Manager's guidebook on intranet redesign projects

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About this guidebook

This guidebook gives a 10,000-foot view of the intranet design or redesign project and is written for managers taking on such a project. However, consultants and designers can also use the guidebook as a reference to anchor their communication with the intranet team and staff.

This guidebook can help managers:

- Get a better picture of what lies ahead
- Communicate a consistent story with staff
- Anticipate and be prepared for the next step
- Ensure that nothing is left out

Part A of this guidebook gives an overview of what goes into an intranet redesign project. It describes the major stages and the activities that go under them.

Part B of the guidebook describes each activity in more detail.

Note on usage: design or redesign

This guidebook can be used for managing intranet redesigns and for managing the design of a new intranet. But it becomes rather redundant to keep referring to this as ‘design or redesign’ all the time. For this reason I am going to stick to one form: **intranet redesign**. Some headings may end up being specifically oriented to redesign, but now you know it can be used for an intranet design project as well!

Create a project blog

Executing an intranet redesign project takes time effort and there will be many decisions made and actions taken during this time. It is important that all of these decisions, comments and suggestions be noted down as and when they take place. The **blog format** is ideal for such note taking.

Start a project blog and have the intranet team use it to document the progress of the project.

If your intranet software has a blog feature then use it to start your blog. Otherwise, you can download and use one of the many blog software packages available on the Internet. For example, *WordPress* (http://www.wordpress.com) is a popular blog software that is easy to implement and use.

Remember to open this blog to all staff. This will help not only in the rollout of the intranet (staff are kept aware) but also in identifying champions who can contribute to the project.

Part A: Overview

An intranet redesign project usually has **eight stages**:

1. Establish an intranet strategy
2. Review information architecture
3. Review content strategy
4. Review collaboration strategy
5. Review branding strategy
6. Implement technology
7. Establish a governance framework
8. Create a user adoption strategy

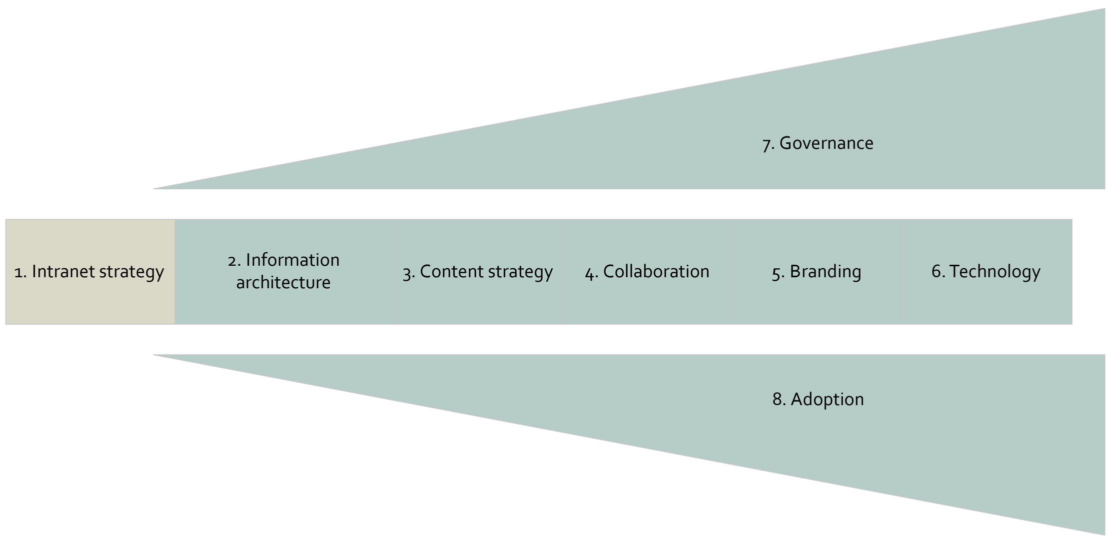


Figure 1: Stages of an intranet redesign project

A couple of points to note from the diagram:

- The strategy needs to be nailed down first
- Governance and adoption start early and continue after the project is completed

The eight stages are briefly described in the following sections.

Stage 1: Establish an intranet strategy

An **intranet strategy** is a high-level plan to make the intranet useful and effective. It gives a direction to everyone working on the project and helps in getting resources and making decisions.

The following activities are done when crafting an intranet strategy:

- Determine intranet owners
- Create a strategic vision
- Establish an intranet team
- Create an intranet charter

Stage 2: Review information architecture

Information architecture (IA) is the art and science of organising information. A good IA helps staff locate information easily. Information here ranges from simple stand-alone pages to large knowledge bases.

The activities in this stage are:

- Create a content inventory
- Conduct card sorting exercises
- Design the intranet site structure
- Design collections
- Design metadata and controlled vocabularies
- Create a prototype
- Test and refine the prototype

Stage 3: Review content strategy

Content strategy refers to a systematic approach to planning, creating and managing content on the intranet.

There are two types of content on the intranet:

1. Common or global content
2. Specific or local content

Common content refers to content that is relevant to all staff. These include the following:

- **Communications**: Company level communications such as news, events, press releases and other company-related information.
- **Shared services**: HR, Finance, Procurement, Communications and Branding, IT, etc.
- **Business unit interfaces**: Forms, procedures and applications required for interfacing with businesses units.

To be effective, content in these common areas should be written and presented in a staff-friendly style. Such a style will help staff find the right information and accomplish tasks with ease, thereby improving trust in the system, which in turn can lead to an increased use of the system.

The activities for common content are:

- Determine a publishing process
- Identify content owners
- Scope common content
- Create content type templates
- Train authors to write effectively
- Write and review common content

Apart from common content, staff have content that is specific to their teams or departments.

For example, engineering and finance teams will have content related to their work. It could be work-in-progress documents or it could be final deliverables. The point here is that these documents are not required outside the team or department, unlike common content.

When you’re doing a redesign, you’ll need to ask the following questions:

- What will happen to such specific or local content after the redesign?
- Will it move to the new system or will it stay in the existing system?
- If you’re planning to move all such content into the new system, how are you going to do it?
- Are you going to have owners review the content before moving?

These decisions are tough. It may take a while before all content successfully moves from the old system to the new system.

The activities for specific content are given below.

- Review existing content
- Create a migration plan
- Migrate content

Stage 4: Review collaboration strategy

Collaboration has become one of the prime drivers for initiating intranet redesign projects.

The reasons are quite clear: collaboration cuts through barriers and allows staff to work across organisational structures, enabling knowledge sharing and improving productivity. It is difficult to argue against such a proposition.

However, collaboration on the intranet still presents a significant challenge: **staff may not be familiar with working in an online environment**. They may know the nuances and exchanges that are needed to collaborate in a face-to-face environment, but when it comes to online collaboration there are fears, uncertainties and doubts that need to be overcome.

Having a clear **collaboration strategy** can help bridge these gaps.

The activities in this stage are:

- Determine a collaboration model
- Establish collaboration roles and responsibilities
- Focus on adoption
- Establish collaboration governance

Stage 5: Review brand strategy

Brand strategy refers to how the brand elements will be addressed during the design of the intranet. The deliverables in this stage usually cover elements such as brand alignment, typography, colours, images, tone and personality.

The activities in this stage are:

- Create the brand brief
- Design visual mocks of key pages of the intranet
- Create the visual style guide

Stage 6: Implement technology

Although this is an important stage, the success of the implementation really depends on the success of earlier stages and on the technical capabilities of the implementation team (internal or external).

The activities in this stage are:

- Gather technology requirements
- Manage the vendor
- Create a sandbox for testing
- Create a migration plan

Note that the implementation team will usually have a software development framework in place. The activities presented here will be part of such a framework. As the project manager, you may not have control over all the technical details, but it is important that you have oversight of the activities mentioned here.

The success of the implementation should be based on **how faithfully it represents the intranet redesign requirements**.

Stage 7: Determine a governance framework

Governance is key to the success of the project and it should not be left to the very end.

A governance framework is a standard approach to governing all areas of the intranet.

Many governance activities involve a **change in culture** or the current way of doing things. It is therefore important that senior management is involved at this stage and supports the cultural change at all levels.

Stage 8: Create a user adoption strategy

Rollout is less about technical delivery and more about **managing the impending change**.

This stage is often missed out or not given the attention that it deserves. While it may be more exciting to just go for the launch, you should not forget the primary target of the change– **the staff**.

Staff need to be informed, trained and supported to make the jump to the new intranet. This stage lists activities that can help staff make the change successfully.

- Identify champions
- Train champions
- Hold briefing sessions with staff on how they can best use the intranet in their work

- Prepare support materials
- Open support channels
- Keep the buzz going

Part B: The activities

Part B of this guidebook describes the activities in the eight stages in detail.

Stage 1: Establish an intranet strategy

Determine intranet owners

What it is

Identifying owners who are going to be responsible for the success (or failure) of the intranet.

Why you need it

You need owners to:

- Give a vision and direction for the intranet
- Rally support from other departments to help in the redesign effort
- Participate in regular project updates
- Sanction important changes and help in decision-making
- Help market the intranet at all levels
- Keep the intranet relevant by using it as a tool to improve the performance of key business initiatives
- Steer the change management effort
- Provide resources to sustain and improve the intranet

How to do it

The owners are usually from the following departments:

- Human resources
- Corporate communications
- IT
- Knowledge management
- Strategy and innovation

Next, plan for a meeting with the contenders. You may already know which departments are powerful or which have vested interests to own the intranet. For example, if the HR department has the most content on the intranet, it will be unwise to leave them out of the meeting.

During the meeting, don't forget to list down the importance of being an intranet owner and the responsibilities that come with this role.

Don't be surprised to find that multiple departments may agree to form a **steering committee** to own the intranet. If this is the case then you need to find out how the responsibilities are going to be shared.

Resources

- StepTwo: Who should own the intranet? (http://bit.ly/n5Orwc)
- Prescient Digital: Intranet Governance: Ownership, Management & Policy (http://bit.ly/3lormy)

Develop a strategic vision

What it is

A **strategic vision** is a short document that gives direction to the intranet. It should, at its very least, help the business stay focused, and at its very best, help the business excel.

All subsequent actions related to the intranet should stem from this strategy.

Why you need it

The vision document forms a base of reference for all discussions on the intranet. Because the intranet owners have endorsed the document it becomes a valuable reference when debating design decisions, features and functions.

Without a strategic vision, you may find yourself in discussions where the base reference for the intranet redesign keeps shifting, sometimes jeopardising the entire project.

How to do it

“Having a central store to keep documents” is not a strategic vision. It does not signify a positive business outcome. It also does not give directions on what to do next.

Given below is an example of a high-level strategic vision.

The intranet will be our online work environment. Staff are required to work in this environment. The intranet will consolidate communications and will help staff share and collaborate to meet business objectives. Information will be organised to support work and to make it more efficient. Key work processes will be supported on the intranet. For example, all leads will be shared on the intranet and so will all project and mission reports. Efforts to improve the intranet will be done regularly and it will focus on making work easier and not the other way around. If legacy business processes are coming in the way of keeping the intranet simple, the legacy business process must be reviewed and aligned to support the intranet.

To keep the focus the following metrics will targeted:

- 100% of news, events and other announcements will be made via the intranet
- 100% of common content will be on the intranet
- 100% of ROT content will be removed from the intranet
- 100% of all customer leads and project and mission reports will be on the intranet
- 80% of all forms will be electronic forms

Note that the above vision has the following features. It is:

- Short and sweet
- Written in plain language that resonates with all staff
- Presents a concept, a vision that is attainable
- Lists metrics to be measured against

Finally, remember to craft this document with the help of the intranet owners. Their endorsement is essential in ensuring that staff take the vision seriously.

Resources

- NetStrategy JMC: Two strategic tools often neglected: the vision and the mission statement (http://bit.ly/n7w2fj)
- Wikipedia: Strategic Planning (http://bit.ly/b3vIMA)

Establish an intranet team

What it is

A team of professionals tasked with running the intranet on a day-to-day basis. This team reports to the intranet owners.

As an intranet manager, you're part of this team. But you'll need more people to support you in this challenging journey.

Why you need it

The intranet caters to different people who have different needs and skill sets. There will be staff who need support and guidance to use the intranet. Some will need to know how to write and publish and some will need to learn how to share. All of this change cannot happen automatically. It needs to be managed. This is the job of the intranet team.

How to do it

Identify existing staff who can fill the different roles required for the team.

There could be a situation where you can’t find the right people with the right expertise within the company and you don’t have the luxury to hire new staff. In such cases you have no option but to select staff with the right attributes **and train them**.

Given below are roles and job descriptions of a typical team:

Role	Responsibilities
Intranet manager *Overall manager of the intranet and responsible for the efficiency and effectiveness of the intranet.* The ideal intranet manager will be a senior-level staff, a degree holder with 5+ years of experience in managing large projects. They will have a strong user-centred focus. They will also have a firm grasp of web-related technologies, especially from the publishing or content-related side of it.	• Build on the vision and mission of the intranet • Keep senior management in the loop • Day-to-day management of the intranet • Audit changes to the common content area • Gather intranet statistics on a monthly basis • Gather and act on feedback from staff (interviews, surveys, usability tests) • Gather, analyse and execute improvements to the intranet (small projects) • Hold monthly intranet reviews • Manage the work of the content strategist and IA/usability specialist • Market the intranet

Content strategist *Responsible for the quality of published content on the intranet.* The ideal content strategist will have a strong web publishing background. They will be a mid-level staff, a degree holder (media and communications) with 5+ years of experience in the web publishing industry. They will have a strong user-centred focus.	• Audit and track common content-shared services • Audit and track common content-knowledge exchange • Create and manage the publishing model • Create and manage content publishing templates • Train intranet authors • Train on the use of collaboration spaces • Train on knowledge capture and representation
Information architect/Usability specialist *Responsible for the ease of use of the intranet and its applications.* The ideal IA/Usability specialist will have 3+ years of experience in information architecture and online usability. They will have done information architecture projects and conducted usability studies. They will be mid-level staff.	• Manage and grow the collections • Train on organising information • Audit organisation of information • Make recommendations and improvements on information access and navigation • Create usability metrics for the intranet • Conduct usability tests on both content and applications • Make usability-related recommendations or improvements • Consult with the IT department on developing intranet applications
Business impact analyst *Responsible for leveraging the intranet to*	• Analyse work practices • Build new work scenarios using the intranet capabilities • Help staff to understand benefits

improve work practices.

This person should have both technical and business knowledge. They should be able to quickly spot opportunities that can make work practices more efficient.

of improving work practices by leveraging the intranet

- Help with the IT department to execute improvements in work practices if necessary
- Train staff on using the new processes
- Measure the impact of the changes

In small intranets, the intranet manager usually performs all the above roles.

You'll need dedicated people if the intranet caters to thousands of staff or has a ton of activity taking place on the intranet.

Resources

- StepTwo Designs: Roles needed in an intranet team (http://bit.ly/A6fO8)
- StepTwo Designs: What every intranet team should know (http://www.steptwo.com.au/products/everyteam)

Create an intranet charter

What it is

An intranet charter describes, in very simple terms, what the new intranet is all about and how it will be useful to staff.

While the intranet vision is a statement of purpose for the intranet team and the intranet champions, the intranet charter is a **statement of promise to staff**.

Why you need it

The charter prepares staff on what to expect when the new intranet is rolled out. It gives them enough time and space to think about how the intranet may affect their work.

How to do it

You can adapt from this sample of an intranet charter given below. Just remember that the message of the charter must be used in all communication to staff. Inconsistent messages will just confuse staff.

> The new intranet [use the eventual name of the new intranet] will make life easier for all staff. It will help you to easily find information that you need for your work. It will also be the platform for you to collaborate with your team and share resources with colleagues across the organisation.
>
> More specifically, the new intranet will allow you to:
>
> - Get up-to-date corporate news and announcements in a consistent way
> - Save time when looking for common information that supports work such as HR, Finance, Training, etc.
> - Easily find and connect with other staff
> - Easily reach out to and share information with all staff
> - Easily collaborate and work together with your team on projects and initiatives
>
> There will be a support team to help you learn about the new features and functions of the intranet.

Once the charter is ready, push it out to staff in a regular and consistent way. This is called 'marketing'!

The charter can be published in poster or brochure form and can be posted in common areas around the offices.

Create an online version of the charter and put it up on the intranet as well.

Resources

- StepTwo: Creating an intranet concept (http://bit.ly/nD0VkN)
- ThoughtFarmer: How to launch an intranet (http://bit.ly/buTIuR)
- Zappos: Family core values (http://bit.ly/dCGKVA)

Stage 2: Review information architecture

Create a content inventory

What it is

A **content inventory** is a list of all pages on your intranet.

This may be a cumbersome, if not impossible, task to do if you have a large intranet. In such a case, it is enough to sample the **different types of content** (e.g. project plans, policies, forms, templates, proposals, etc.) existing on the intranet. This shorter list is called a **content audit**.

Allow selected staff from different departments to go through the content audit and review it. This will help you spot missing content types and other important information.

Why you need it

Doing a content audit has many advantages:

- It presents an overview of common pages
- It opens up the opportunity to analyse the content and identify gaps (such as orphaned content and outdated content)
- It becomes a managing tool during the intranet content writing phase
- It doubles-up as a migration plan when you want to move content to the new intranet

How to do it

Create an MS-Excel spreadsheet with the following columns:

- Name of page
- URL of page
- Owner
- Content type
- Redundant, Outdated, Trivial (ROT)
- Remarks

Go through the pages of the intranet section by section and capture a representative sample of pages within each section.

Resources

- Donna Spencer: Taking a content inventory (http://bit.ly/xpyxL)
- Adaptive Path: Doing a content inventory (http://bit.ly/nZLuyW)

Design the intranet site structure

What it is

The information on an intranet is usually organised like a tree (hierarchical). An **intranet site structure** shows this organisation.

Why you need it

The site structure shows how the intranet is organised. Without it you will have no basis for building the intranet.

Given below are two sample substructures for HR information.

Sample 1	**Sample 2**
Employee info	HR

- Circulars
- Declaration of assets
- Uniform
- Delegation of duties
- READ THIS BEFORE TAKING LEAVE -- leave application
- Service conditions
- Hire2-updated
- First days at work
- Leave & time off
- Pay & benefits
- Medical benefits
- Dental benefits

Notice that Sample 1 seems randomly listed. There is no clear organising principle and the names do not follow a consistent style. Such structures have many disadvantages such as:

- **Low use**: A poorly designed site structure is an effective staff-repellent. It will drive staff away instantly. They will not be able to find information and will feel lost.
- **Lost opportunities**: Every repelled staff is a lost opportunity for the intranet to be useful.
- **Loss of trust**: Staff will lose trust in the intranet. If they lose trust, they will hoard.
- **Information hoarding**: Staff will hoard information and will create local copies for themselves.
- **Increased memory workload**: Staff tend to rely on their memory to remember where content is found instead of being guided by intuitive navigation labels.

Site structures, therefore, must be designed with care.

How to do it

Here are steps to go through:

1. Study the content inventory and look out for areas that can be fixed quickly using site structure best practices (see resources section)
2. If you have doubts on how to arrange some areas, then conduct card-sorting exercises (see next activity)
3. Once you've gone through all substructures, stitch them together. This will give you the overall site structure.
4. Test out the new structure with staff. This is called a 'site structure test'. The test can be done by way of another card sorting exercise or by using software specifically designed for testing site structures (e.g. Treejack, http://bit.ly/g708p).

Resources

- PebbleRoad: Designing site structures for intranets and websites (http://bit.ly/YBYYz)
- Rosenfeld Media: Card sorting: designing useful categories (http://bit.ly/eAzQN)
- UX Booth: Classification schemes and when to use them (http://bit.ly/aUcQPx)
- Boxes and Arrows: Card sorting: a definitive guide (http://bit.ly/16rTpL)

Conduct card sorting exercises

What it is

Card sorting is a method to understand how staff group and arrange content on the intranet.

Why you need it

Content on the intranet can be grouped and arranged in many different ways using many different perspectives. For example, the intranet manager may group items in one way that they think will be useful. The content owners, on the other hand, may think of another way to group content that they think will be useful.

Content on the intranet should be grouped and arranged from the perspective of the people using the content—the staff's perspective.

Card sorting exercises reveal the staff's perspective in grouping and arranging content.

How to do it

Here are the general steps:

1. Use the content inventory and identify sections you want to test out
2. Pick out a representative sample of the content from these sections
3. Write the title of each content item on an index card (you may end up with hundreds of such cards)
4. Recruit appropriate staff for the exercise and instruct them to group content items that they think belong together. You may also want them to label the groups they create.
5. Make a note of their arrangements and labels
6. Conduct several rounds of the same exercise with different staff
7. Analyse the results to get a better picture of how staff see the content on the intranet

Resources

- Rosenfeld Media: Card sorting: designing useful categories (http://bit.ly/eAzQN)
- UX Booth: Classification schemes and when to use them (http://bit.ly/aUcQPx)
- Boxes and Arrows: Card sorting: a definitive guide (http://bit.ly/16rTpL)

Design collections

What it is

A **collection** is used to organise homogeneous content or content that exhibit similar attributes. For example, *Corporate News* is a collection—all corporate news items have a similar content structure. They are also called *structured pages*.

An intranet can have many collections, such as:

Corporate news	Project documents
Events	Trip reports
Customer feedback	Case reports
Customer profiles	Intelligence scans
Sales inventories	

Collections can scale well. If you have a collection of knowledge assets with a well-defined metadata then it does not matter much if you have 50 documents in this collection or you have 50,000 documents. The navigation scheme largely remains the same (the taxonomy may have to scale though).

Why you need it

All intranets will have collections. Some may be general, such as News and Events, while others many be aligned to business needs such as project, sales and trip reports. The big idea behind collections is that they **can be connected**. This has many advantages. For one, staff can easily crosslink different collections such as **country briefs** and **trip reports** for that country. This makes it easily to easily hop, skip, and jump between related information easily. The outcome is that information is easy to find and navigate.

How to do it

Once you’ve identified a collection, you need to identify the scenarios under which the collection will be used. This will also give you a direction for the metadata you need to have.

For example, for the **trip reports** collection, you may want to design for the following scenario: "Find a trip report made to a particular country in a particular year for a particular purpose."

The metadata needed for this scenario are:

- Purpose of the trip
- Country the trip was made to
- Year the trip was made

Note that this metadata will be in addition to the other types of metadata you need to identify (see next activity).

Once you've identified the metadata you can quickly create a flow of the collection such as the following:

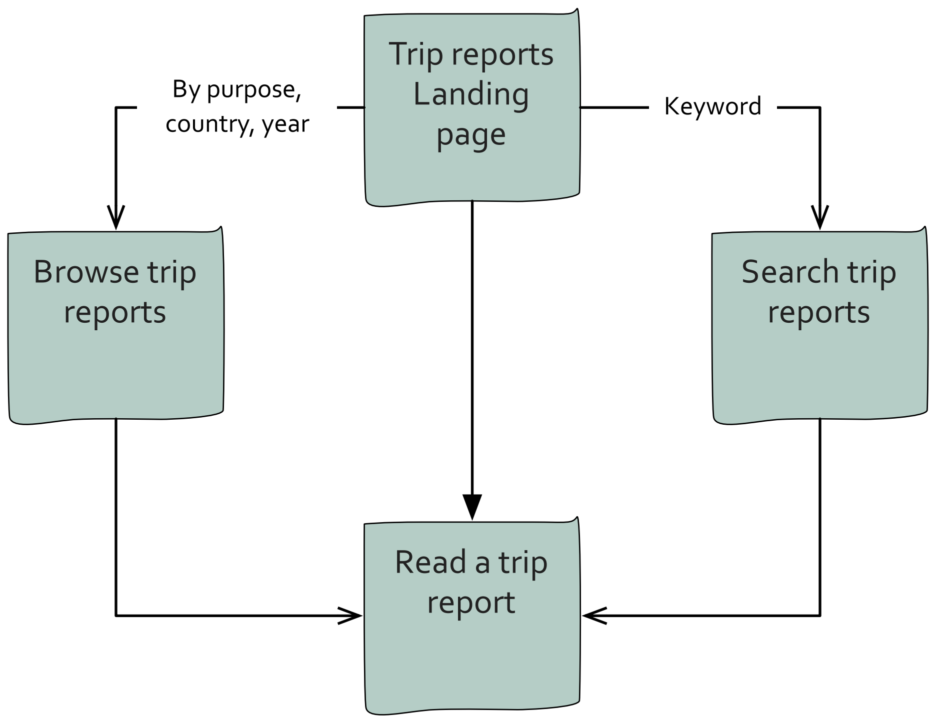


Figure 2: Trip report collection model

Resources

- PebbleRoad: Designing site structures for intranets and websites (http://bit.ly/YBYYz)
- PebbleRoad: Designing collections for the web (http://bit.ly/cfQRpv)
- Ann Rockley: Managing enterprise content (http://amzn.to/oIjzT6)

Design metadata and controlled vocabularies

What it is

Metadata is data that you use to find information. For example, you may want to find trip reports by:

- Title of a trip report
- Purpose of trip
- Country the trip was made to
- Year the trip was made in
- Cost of the trip

Metadata carries values. For example, the country the trip was made to can hold the value 'USA'. Here comes a problem. One staff may enter 'U.S.A.' while another might enter 'US'. So who is correct?

In order to have consistency in what value a metadata item carries, the values are controlled or pre-specified. If a value for the country metadata is specified as 'U.S.A.' then staff will just have to *select* this value (instead of *entering* it manually).

Such controlled values are called **controlled vocabularies**. Controlled vocabularies, or CV for short, are usually presented in a drop-down list for staff to select the values from.

Why you need it

All pages on the intranet should have metadata. Metadata makes it possible to easily identify, co-locate and share information across the organisation.

Without metadata it will not be possible to relate one piece of information to another. For example, one trip report is related to another trip report because they share the same metadata called ‘document type’.

Moreover, if the organisation has a corporate metadata standard then it should be used and applied to information on the intranet as well. This will ensure that the company has an overall view of all the information. Think of this corporate metadata standard as a wide net that is cast over all the information a company owns.

How to do it

Establishing a corporate metadata framework requires specialist expertise. If you have someone with such expertise within the company, then use this person to craft the metadata framework. Otherwise, you have no option but to get a consultant to get this work done.

Resources

- Wikipedia: Metadata – Wikipedia (http://bit.ly/9OBZa6)
- NISO: Understanding metadata (PDF) (http://bit.ly/5dJIHM)

Create a prototype

What it is

A **prototype** gives shape to the intranet information architecture. It is a limited working model of the intranet that visually shows how staff will interface with the new intranet. Just note that the prototype is skeletal, meaning it is without the visual design layer (or skin).

Why you need it

A prototype is primarily used for **communications** with different people. For example:

- It is easier to get feedback from **stakeholders** from a prototype than it is from textual documents.
- It is also easier to get feedback from **staff** by testing the prototype with them.
- Lastly, it is easier for the **development team** to understand the requirements of the new intranet by looking at the prototype than by reading textual requirement documentation.

A prototype shows two aspects of the intranet: **information organisation and navigation.**

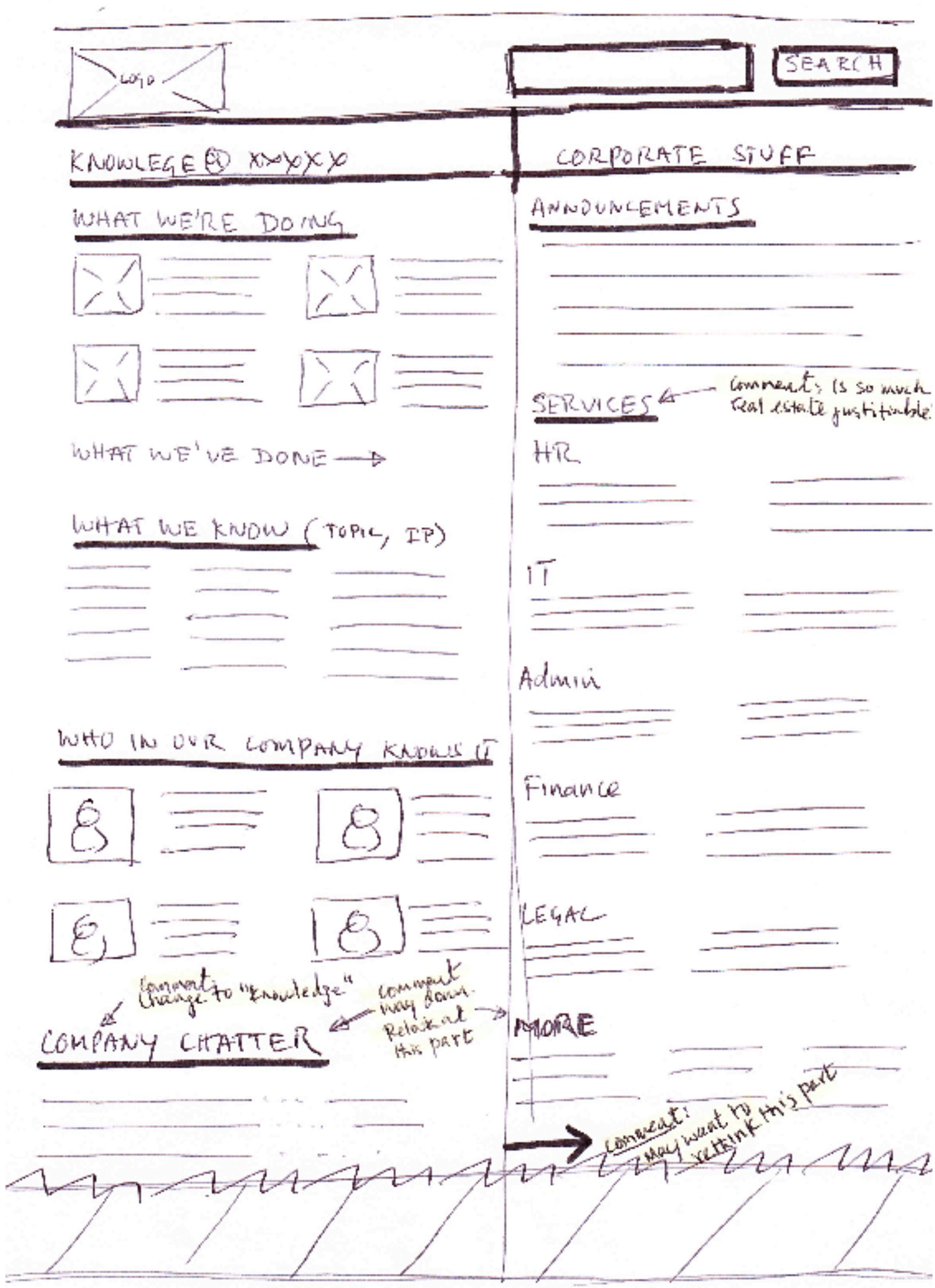


Figure 3: Hand-drawn wireframe

How to do it

There are many different ways to create a prototype. It could be done on paper, PowerPoint, a prototyping software application or even HTML.

Irrespective of how it is created, your prototype should communicate the design requirements well.

Resources

Wireframes magazine

- Smashing Magazine: 35 Excellent Wireframing Resources (http://bit.ly/dJFmS)
- Rosenfeld Media: Prototyping – a practitioners guide (http://bit.ly/9Fa3f)
- Axure (prototyping application): http://www.axure.com

Test prototype

What it is

A prototype test is done to evaluate whether the new design is meeting its objectives or not. The design objectives are usually to enable staff to execute information-seeking tasks quickly and efficiently. A prototype test can be done to test an application workflow as well.

Why you need it

Although the prototype is developed based on research, the information organisation or navigation may not be usable. A prototype test can shed light on whether or not staff can accomplish a set of tasks. The tasks are usually ones that are common or important.

How to do it

Identify key scenarios you want to test. Make sure that the prototype can support these scenarios.

For example, if you want to test if staff can find 'the latest corporate circulars', then your prototype should have pages that lead up to finding the latest corporate circulars. Sometimes, you may need to add more sections to the prototype just to support the scenarios.

A common metric used for a prototype test is '**task-completion**'—whether or not staff can complete the tasks given to them.

Task-completion is a useful metric, but don't accept the results blindly. Sometimes the way the task is staged in the prototype may be a better way of doing things, but because staff are not used to this new process they may not be able to complete the task given to them.

In such cases you should account for the time taken for staff to learn the new process. You could, for example, test two similar tasks at different times during the test. Or, you could have a briefing session before the test to give staff an overview of the new design.

The idea here is not to discount an efficient process just because staff fail to complete the task—they may just need a little more time to understand the new process.

Make changes to your prototype based upon the findings you gather from the prototype test.

Resources

- Smashing Magazine: 35 Excellent Wireframing Resources (http://bit.ly/dJFmS)
- Rosenfeld Media: Prototyping – a practitioners guide (http://bit.ly/9Fa3f)
- Axure (prototyping application): http://www.axure.com

Stage 5: Review content strategy

Determine a publishing process

What it is

An intranet publishing process guides how information is published to the intranet and managed thereafter.

Why you need it

Depending on your intranet, you will be managing a small or a large team of content writers. There will be chaos if there is no standard process to submit and publish content to the intranet. A standard process makes it clear what is to be done and what is expected.

How to do it

There are three common ways to publish to the intranet:

1. **Direct publishing**: Content writers publish directly to the intranet. They take full responsibility for the accuracy and completeness of the content.
2. **Central publishing**: Content writers send content to their department content owners, who then send it to a central publishing team that manages the publication process.
3. **Approver-based publishing**: Content writers send content to an approver. The content is published after it is approved.

Many intranets use a hybrid approach. Corporate News, for example, is usually published directly, while a policy is usually routed to an approver before getting published.

Sit with the intranet team and select a process that will work in your organisation.

The publishing process you select will impact the system implementation. Workflows and notifications that you indicate in your publishing process will have to be factored into the system. It is best, therefore, to involve the system implementers when making this decision.

Take on-the-ground realities into consideration when creating workflows. It will be inefficient and frustrating if there is a serial workflow but staff who are required to provide approval are always travelling. Try to keep workflows simple and practical.

Resources

- StepTwo: Five intranet publishing models (http://bit.ly/BMSCQ)
- Mark Morrell: Publishing great content on BT's intranet (http://bit.ly/cbEus5)
- Content strategy for the web: http://www.contentstrategy.com/
- A list apart: Elements of Content Strategy (http://bit.ly/gHPXM9)

Scope common content

What it is

Common content refers to content that is general or common to all staff. Usual common content includes HR, Finance, IT, corporate communications, etc.

Why you need it

Properly organised and designed common content is one of the most basic and fundamental benefits of the intranet. Staff can self-serve their way to information and tasks, thereby becoming more productive.

How to do it

Common content will be identified during the information architecture study.

Common content must be scoped and respective owners must be identified for each piece of content. This task can be managed using an Excel spreadsheet.

Given below are details that should be captured in this spreadsheet:

- Page
- Owner
- Approver (or editor)
- Location of existing content
- Writing – start date
- Writing – end date

This spreadsheet should contain details of all common content pages and it needs to be managed by the intranet manager (you).

Resources

- NetJMS: When ‘global and local’ becomes ‘common and specific’ (http://bit.ly/oMMbSU)
- Yahoo Style Guide (http://styleguide.yahoo.com/)

Train authors

What it is

Train authors to write content for the intranet in a consistent style.

Why you need it

Training is important because it will allow the content to be written in a consistent and proper style. Otherwise, different pages will look different and there will be no consistency in the way content is presented.

For example, one page may use headers, while the other may not; one page may use legal numbering for bullets, while the other may use roman numbering.

How to do it

You will first need to create an editorial style guide if you don’t already have one.

An editorial style guide contains, but is not limited to, the following:

- Headlines and titles
- Punctuation
- Capitalisation
- Spelling
- Usage

Once you have the editorial style guide in hand, you can then start offering training sessions to staff on how to improve their writing using the editorial style guide. Remember to make these sessions hands-on and practical. You’ll need a wide variety of good and bad examples for exercises.

Resources

Yahoo Style Guide (http://styleguide.yahoo.com/)

Write common content

What it is

This is the actual act of writing common content for the intranet.

Why you need it

After the authors are trained, they need to start writing their content. This writing process needs to be managed.

How to do it

Here is a good process to follow:

1. Have authors write the common content in MS-Word and not directly using the Content Management System (CMS) authoring environment. This way all common content can be screened for consistency and style before it is published to the intranet. In addition, by using MS-Word to write the content, you don't have to wait for the CMS to be up and ready.
2. Create a MS-Word template for content authors. Customise this template to follow some of the rules of the editorial style guide. For example, the template can be used to automatically insert captions for tables and to format the dates correctly.
3. Review the submitted common content. Turn on 'Track changes' when reviewing. This way the authors can be aware of the mistakes they may be committing.

Resources

- Yahoo Style Guide (http://styleguide.yahoo.com/)
- Content strategy for the web: http://www.contentstrategy.com/
- A list apart: Elements of Content Strategy (http://bit.ly/gHPXM9)

Stage 4: Review collaboration strategy

Determine a collaboration process

What it is

Collaboration on the intranet is fast becoming one of the main reasons for having an intranet. A collaboration process sets the standard for collaborating on the intranet.

Why you need it

Staff may know how to collaborate and work on a project through face-to-face meetings and sharing documents through email (not a very efficient process, though) but it is a very different matter when it comes to working in an online environment. The simple basics such as what to do when starting a collaboration space, inviting participants, documenting discussions and closing a collaboration space are very new concepts and needs to be defined and managed.

In addition to putting up a structure, the collaboration process also sets up how discussions and documents can be shared, not only in a project but also across projects.

Finally, a collaboration process is needed to change old habits. Staff may be used to simply creating folders and putting files in them without consideration of how they will be accessed. This will have to change when in a collaboration setting.

How to do it

A good way to establish a collaboration process is to outline what takes place before, during and after collaboration.

The table below shows such a process.

Before collaboration	During collaboration	After collaboration
Introduction to collaboration	Roles & responsibilities during collaboration	Roles & responsibilities after collaboration
Roles & responsibilities before collaboration	Strategies for participation for different collaboration types	Surfacing collaboration lessons learnt
Creating a collaboration space	Housekeeping policies	Housekeeping and archiving a collaboration space
First steps after creating a collaboration space		Collaboration review
Collaboration tools – which to use when		

As you can see, there is a lot that goes into getting the collaboration strategy right. We can’t cover all the points, but let’s take a look at the most important one next.

Establish collaboration roles and responsibilities

What it is

Having a process is not enough. You’ll need people to manage the process.

Why you need it

Collaboration cannot run in autopilot mode. There will be day-to-day training and help that is required. Staff may not know how to collaborate on a complex project or they may have special requirements. A team is required to manage this process.

How to do it

Typically there are three roles that are needed to manage collaboration:

1. **Steering**: People in this role guide the collaboration process. They provide the necessary support and sponsorship needed for collaboration to succeed in the organisation.
2. **Business**: People in this role are closer to the ground. They link the steering to execution. They understand challenges staff face and use that to provide solutions. Their objectives are to help staff collaborate better to support their business goals.
3. **Technology**: People in this role give the technical guidance to support collaboration. They support day-to-day management all the way to designing custom applications.

Put in the effort to get passionate people to fill these roles.

Resources

- Michael Sampson on Collaboration: http://currents.michaelsampson.net/
- Michael Sampson: Seamless Teamwork: http://www.michaelsampson.net/seamlessteamwork.html
- Collaboration roadmap (http://www.collaborationroadmap.com/)

Focus on adoption

What it is

If intranet collaboration is new to your organisation then you may have a challenging time getting your staff to use the collaboration tools in the intranet. Usually, this may less to do with the collaboration tool itself and more to do with the possibility that staff are not seeing the benefits of using it or that they don't have the skills to use the it.

Your job as the intranet manger is to be observant of such gaps and then take action to bridge them.

Why you need it

One of the biggest challenges in getting collaboration to work in an organisation is getting staff to understand how collaboration can help them in their work.

Wikis, blogs, status updates and real-time authoring are all very exciting to the technically inclined. But many other staff, especially older staff, will fear such tools.

A good way to allay their fears is to build their confidence in understanding and using the tools. This is where adoption comes in.

How to do it

There are many adoption tactics that can be used, but before you focus on just the tactics is important you establish and overall adoption strategy. Michael Sampson has written and excellent book on adoption especially for collaboration setups. You can find information on this book and many more resources at http://www.michaelsampson.net/useradoption.html

Also, more on overall adoption is described in Section 8 of this guidebook.

Review collaboration

What it is

A collaboration review is done to understand how the collaboration effort is unfolding in the organisation.

Why you need it

The collaboration should be reviewed regularly to gauge where it is working and where it is not and what can be improved. This sets up an improvement cycle that not only improves the collaboration effort, but also sends an important message to staff: collaboration is important and the organisation is serious about making it work.

How to do it

Review the following areas:

- Were collaboration goals clearly articulated?
- Were members well informed about the process?
- Were processes followed?
- Were the tools used effectively?
- Was support given when needed?

The reason for doing the review is to identify gaps that may be preventing effective collaboration from taking place in the organisation.

Resources

- Reviewing intranet-based collaboration setups (http://bit.ly/1a1LWX)
- Enterprise 2.0: New Collaborative Tools for Your Organization's Toughest Challenges (http://amzn.to/bxp4bK)
- Collaboration roadmap (http://www.collaborationroadmap.com/)

Stage 5: Review brand strategy

Create the brand brief

What it is

A brand brief is a short document that lays down the Who, What, Why, When, Where and the How of applying the brand elements. It gives many examples of how to apply the brand elements in different situations, as well as showing common mistakes and incorrect usage of the elements.

Why you need it

The brand brief sets the visual communication strategy for the intranet. The styles govern how the intranet will look, how visual additions will be made, the design of the marketing materials, and so on.

The brand brief will be used in the content strategy stage (to align with the same principles) and in the rollout stage (to create advertising or promotions that align to the principles).

If you have a small intranet, then you may not need an intranet brand strategy. But if you have a large or multiple intranets, then you should consider having a consistent brand direction across all intranet properties.

How to do it

It's best to get a specialist to create the brand brief. You can do it internally if you have someone with branding expertise, otherwise, get an external brand consultant.

Resources

- Online Journal of Business & Design: What goes into a brand brief (http://bit.ly/fB59uh)

- Roland Smart: The creative brief – branding (http://bit.ly/ro4Stu)

Design visual mocks of key pages of the intranet

What it is

Key pages of the intranet prototype, usually the home pages or the departmental pages or the social pages are **Photoshopped** using the brand elements and guidelines. These are called visual mocks.

Why you need it

Visual mocks are used in a few situations. These are:

- To discuss the visual design
- To present to management
- To discuss with the implementation team about the feasibility of executing the design

How to do it

Get the visual designers to study the prototype and the brand brief. They should also be aware of the overall goals and objectives of the intranet.

Identify key pages of the prototype to mock. The choice of pages should be guided by their ability to present the different brand elements. If a detail page can provide better fidelity, then it should be mocked up as well.

Once the designs are in, do an internal review before showing them to stakeholders or staff.

You should manage this process well. Otherwise you risk getting into a never-ending spiral of small changes. Here is a good practice:

- Take the homepage and create three visual variations

- Discuss with the team and stakeholders and select one design
- Apply the chosen design to several other templates
- Discuss with the team and the stakeholder again and refine the design
- Continue with remaining pages and create the style guide

Create the visual style guide

What it is

A visual style guide lists the design rules used in creating the visual mocks. These rules usually cover the following:

- Layout
- Colour
- Typography
- Content containers
- Images and other media

The sample screens shown below are taken from the Drupal visual style guide. (Drupal is a popular open source content management system.)

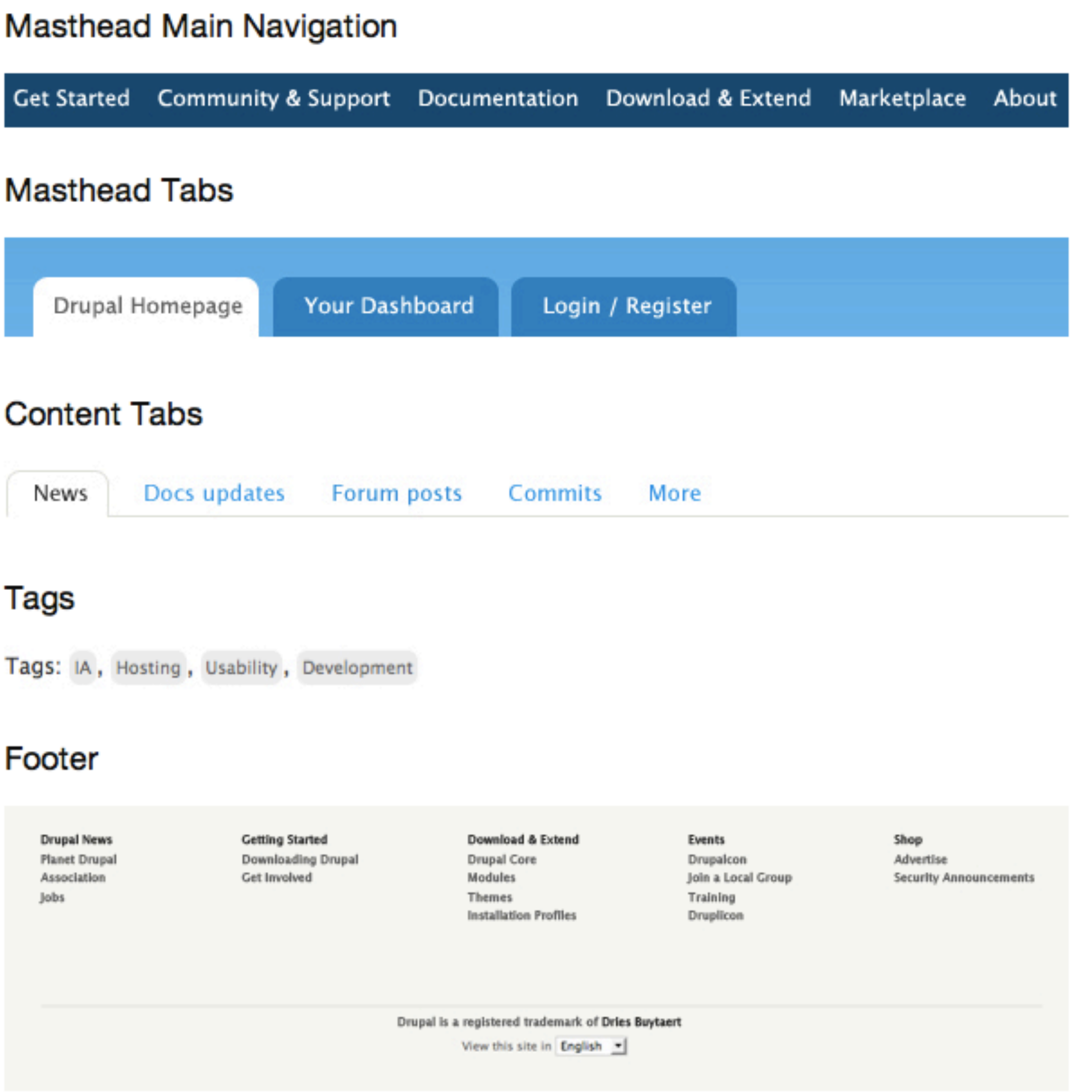


Figure 4: Sample of Drupal visual style guide

Why you need it

Visual style guides govern the look and feel of pages on the intranet. The style guide lays down rules for creating new sections and new pages. Without the style guide there would be no control over the look and feel of pages that go up on the intranet.

Note that although a visual style guide is independent of the underlying technology platform, you could come across situations where the technology platform just cannot deliver a particular style without extensive customisation. In such cases you'll have to look at the costs and benefits to understand the impact of keeping to a particular style.

How to do it

Ask the visual designers to create the style guide. They know the design decisions they made in creating the mocks.

Resources

- PebbleRoad: Creating and Maintaining a Web Style Guide (http://bit.ly/fZF7v)
- Drupal visual style guide (http://bit.ly/7nng6J)
- The UX Bookmark: A huge list of Style guides & UI guidelines (http://bit.ly/9T43Bs)

Stage 6: Implement technology

Gather technology requirements

What it is

Now that the design requirements are done, either an internal team or an external team will be called in to translate the design requirements into technical specifications.

Why you need it

You need the technical specifications because this is the bridge that links what the design phase has spent so much time and effort on and what finally will be implemented as a working intranet.

The technical specifications **may not match the design requirements completely**. This is where you, as a manager, have to be cautious and understand why the technical team cannot build a particular design feature. Is it because the technical team is not competent, or because the product does not support the feature, or because it will be too expensive to customise the feature? More often than not it is the lack of creative skills on the part of the technical team that leads to a feature getting axed and the default being chosen. So be careful here.

How to do it

It is the job of the technical team to draw up the technical specifications. However, you have to sit with them and go through each item and ensure that it does not compromise the intranet design. Yes, this process takes time, but the effort is worth it as it will clear the smoke early on and lay the foundations for the new intranet.

Create a sandbox for testing

What it is

Full development would start after the technical specifications are written down and signed off.

It would be wrong if staff are just ‘given’ the new system six months down the road. Staff need to be involved in the implementation phase as well.

A good way to get this going is to create a sandbox. A sandbox is a testing area where the system functions and features are tested. Selected staff can use the sandbox to test out important features and functions before they are rolled out.

Why you need it

You need a sandbox to ensure the implementation is going according to plan. Staff can test out important features and functions and can identify gaps before the system is fully rolled out. This closes the feedback loop and keeps expectations in check.

How to do it

Ask the appointed technical team to set up the sandbox. Select the right staff (champions or those interested in being a part of it) and brief them on the objectives of the testing. Observe and measure if the features and functions are meeting the design specifications.

Keep a log of the changes and suggestions given by staff. Review this log at regular intervals to ensure the issues are addressed.

Create a migration plan

What it is

A migration plan is one of the **most important deliverables of the implementation stage**. It clearly shows how existing content and applications will be treated and taken over to the new system.

Why you need it

The migration plan is the one that surprises many intranet managers. This is because the amount of time and effort required for the migration is underestimated.

It is much better to iron out all the migration issues as early as possible to avoid delays in the implementation.

Remember that staff not only want a new and more efficient system, but they also want all of **their important content** back.

As an intranet manager, you should be wary of such blanket statements. The old intranet usually will have content that is just not worth keeping, but some staff may request if for the sake of "safety". This is usually a sign that they do not want to invest the time to go through the content and do a bit of housekeeping. Be sensitive to such requests. It could be that the staff or the department needs some help in understanding how to manage content and keep good quality content.

How to do it

You need a technical team that has experience and expertise in managing migrations. There are no two ways about it. There are many things that can go wrong in a migration and having people who have bee**n there and done that** is a real boost.

First, you have to select content that is useful to go into the new intranet. Next, you have to decide if the selected content needs to be rewritten or just copied over. If you find that much of the content needs to be rewritten then you need to dedicate the time, effort and resources needed to get it done. You may be looking at four months to write around 500-700 pages of content. A good tip: **start as early as you can**.

Resources

- CMS Wire: No Small Task: Migrating Content to a New CMS (http://bit.ly/fFqxO)
- CMS Wire: Content Migrations: Options, Strategies and Faux Pas

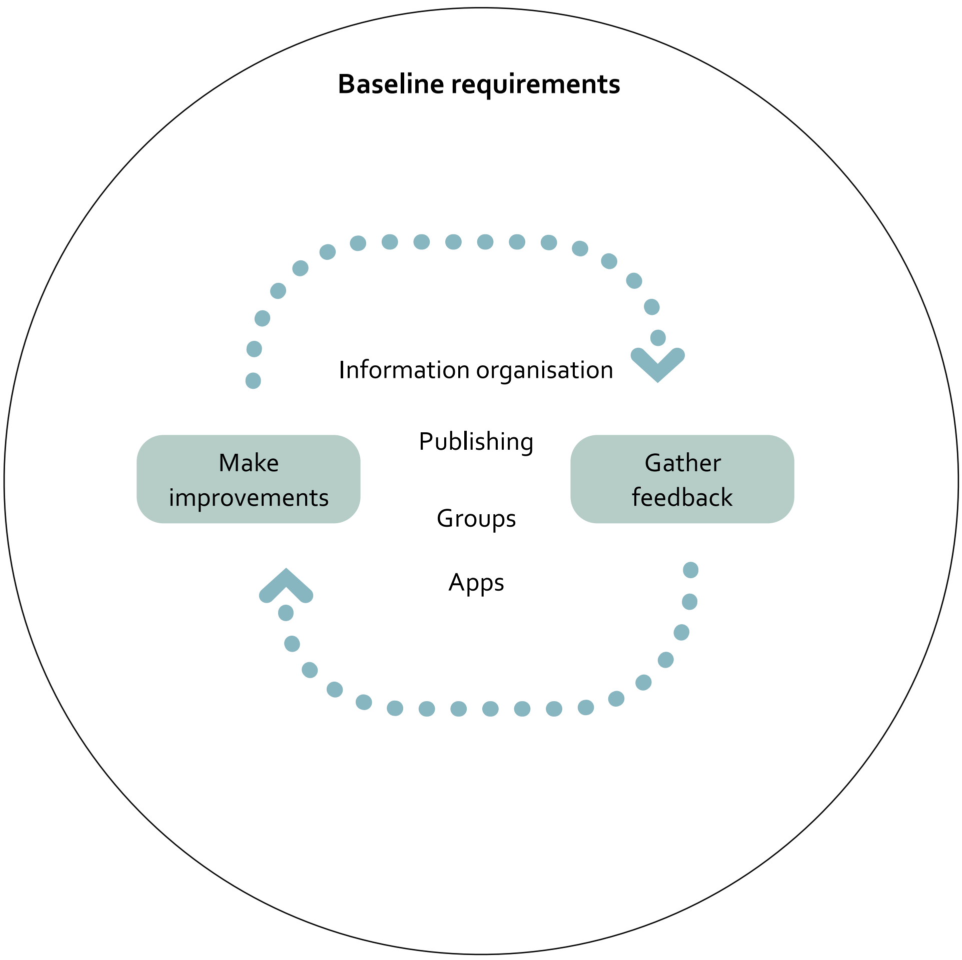
(http://bit.ly/EY2LN)

- Microsoft: Content migration (http://bit.ly/cKU95E)
- PebbleRoad: Planning and coordinating content migrations (http://bit.ly/oispLH)
- ThoguhtFarmer: Content migrations: the iceberg of intranet projects (http://bit.ly/roavRj)
- Website migration handbook (http://migrationhandbook.com/)

Stage 7: Establish a governance framework

Governance is a framework for managing, supporting and improving the intranet over time. This means that after we have certain baseline requirements in place (vision, leadership, team, terms of use), governance is really about making day-to-day decisions to support and improve the intranet.

There are many different ways to govern the intranet, given below is something that has worked for us in our client engagements.



This framework calls for a set of baseline requirements. This should be in place before the improvement loop can take place. There are four key targets for governance: information organisation, publishing, groups and apps.

Given below is a brief description of this framework.

Setting the baseline

Baseline requirements are those that must be in place for successful operation of the intranet. These are:

- Clear vision of intranet
- Leadership support
- Intranet team

We've covered many of these areas in earlier sections.

Governance areas

There are four areas of governance:

1. Information organisation
2. Content
3. Groups
4. Technology

For each area of governance we outline the following:

- **Who**: who is responsible for this item. An item could be publishing procurement policies.
- **Guidelines**: what guidelines are applicable for this item. An example of a guideline can be the Writing Style Guide. This should be referred to when common content is authored or updated.
- **Feedback**. This refers to how feedback is gathered for the item. Using the same example, feedback could be captured using interviews, analytics,

usability testing, etc.

Given below is a sample:

Item	Who	Guidelines	Feedback
Common content	Intranet team	Publishing guidelines Writing guidelines Content review checklist	Staff feedback via the intranet or emails Comprehension testing

The same procedure is applicable for all items under all the four areas of governance.

It is important to note that you cannot expect to get everything ready by the time the intranet launches. However, it is imperative that a deliberate attempt be made to build the guidelines and the feedback mechanisms when the item is encountered for the first time. For example, if the intranet team is focusing on the collaboration then the team should also focus on building the guidelines and the feedback mechanism as well. Do not wait till everything is done and then try to build the guidelines and the feedback mechanisms.

Resources

- Intranet Focus: Governance and Strategy (http://bit.ly/oYQ14e)
- ThoughtFarmer: Why intranet governance matters (http://bit.ly/nMbIKw)
- NetJMC: Governance in the digital workplace (http://bit.ly/e99i9q)
- Martin White: Intranet Management Handbook (http://amzn.to/nKmyuv)

Stage 8: Create a user adoption strategy

There are many ways to get staff ready—from management-driven formal approaches to champion-driven fun approaches. Here is just a small sample of possible strategies.

Identify champions

Who they are

Champions are staff who are motivated and energised by the vision of the new intranet and want to play a part in the change.

Why you need them

You and your intranet team can do only so much. If you have a large organisation then it gets even tougher to get staff to learn and use the new intranet. Champions can help your team out because they are also interested in the new intranet and are motivated to help. With a network of champions across your company you can reach many more staff and are able to support them more efficiently to make the change.

How to do it

Anyone can volunteer to be a champion. However, at times, champions need to be found.

You can find potential champions by noting people who are asking many questions about the new intranet, who are showing keen interest in the progress of the intranet, or who are making suggestions or giving ideas voluntarily. Gather such staff and give them the opportunity to become acknowledged champions.

Even champions need training so that they are better prepared to guide others. Hold a few training sessions for champions and give them access to all the support materials. Teach them the best practices and the common pitfalls.

As with other initiatives, champions should be familiar with the intranet charter and should use the same vocabulary and principles when interacting with others.

Have briefing sessions on new features and functions

What it is

Not all staff have the time to pay attention to an intranet rollout. You may need to hold briefing sessions across the organisation to inform staff that there is something new coming their way, and let them know how they will be affected and how they can prepare for the change.

Why you need it

A briefing session reaches out to many staff and starts the buzz around the new intranet. The session also addresses the ‘What’s in it for me?’ factor—staff know what to expect and how they can better prepare for it.

How to do it

Briefing sessions should reach out to as many staff as possible. You may have to hold multiple briefing sessions, if needed.

Briefing sessions should be organised like an event and not like a classroom training session.

There could be booths set up to showcase important features and functions of the intranet, and to hand out support materials.

Prepare support materials

What it is

Support materials are materials like how-to guides, frequently asked questions, style guides, tips and tricks, templates and process diagrams. These should be prepared and made available to staff before rollout.

Why you need it

A wealth of support materials shows that you care about this new intranet and you’re doing your best to help staff use it. It also motivates reluctant staff to give the new intranet a shot. Finally, the support materials will set the tone for subsequent conversations on the intranet. How you design the support materials, the language you use, the concepts you introduce will find its way into common use.

How to do it

Creating support materials takes time, so it is best to start early. A good time to start will be when the specifications for the new intranet are drawn up and the implementation is underway.

A good way to create support materials is to create a **support wiki.** With a wiki, the process can start early and the pages can be built over time. This creates a nice rhythm for the rest of the project.

Assign the job of building the pages to few interested staffers. They can work out the structure of the wiki and content for the pages.

Try to use media where possible. Short video instructions are better bets than long, bulleted pages.

Open support channels

What it is

Support channels can provide a way for staff to ask their questions and have them answered.

Why you need it

Staff will have many fears, uncertainties and doubts around the new intranet. If these are not addressed they may lead to bigger problems; for example, loss of trust and negative publicity.

How to do it

Two common ways to implement support channels are:

1. E-mail and phone support.
2. Website support that lists FAQs, common practices to follow, etc.

E-mail and phone support are easy to implement. However, you’ll have to ensure that staff are aware of such support channels.

All e-mails need to be archived and available for others to browse through.

A support website is an area on the intranet that hosts all intranet support-related materials. The support materials you create (see previous section) can be housed here.

Note that like other pages on the intranet, the support pages will also grow. Therefore it is best to estimate the time, effort and resources required to keep the support channel running smoothly.

Resources

- Michael Sampson: User adoption strategies (http://www.michaelsampson.net/useradoption.html)
- The Association of Support Professionals (http://www.asponline.com/)

Keep the buzz going

What it is

Keeping staff informed on the happenings on the intranet front.

Why you need it

A common complaint staff have about an intranet rollout is that it takes them by surprise – they do not see it coming. By keeping the redesign buzz going right from the start has many advantages:

- Helps staff prepare and plan
- Gives an opportunity to take part or voice concerns
- Keeps competing or redundant projects at bay
- Keeps a healthy conversation going

How to do it

The easiest way to do this is to communicate frequently about the impending change. The internal communication platform can be leveraged for this purpose, especially for email broadcasts.

If the support website channel is used then it can double up as the primary channel to communicate news and developments on the new intranet.

Here are some tips on keeping the buzz going:

1. The first batch of communications should focus on the goals of the new intranet. The intranet charter can be used for this purpose.
2. The second batch of communications should focus on preparing staff for the change. Providing screenshots or previews of different sections of the new intranet can help.
3. The final batch of communications should start after the intranet is launched and it should address common misconceptions or fears that

staff might have about the new intranet. The support channels can be leveraged for this purpose. Use stories to illustrate the benefits of the intranet. It’s one of the better ways to demystify the intranet.

As mentioned earlier, a blog can be used to inform staff about the new intranet. The blog can be started as early in the process as possible and when enough materials are ready to share. It is also important that this communication is done regularly—infrequent communications will only dilute the ability of this channel to inform staff of the change.

Resources

- Michael Sampson: User adoption strategies (http://www.michaelsampson.net/useradoption.html)
- The Association of Support Professionals (http://www.asponline.com/)
- Microsoft: I Use SharePoint (http://sharepoint.microsoft.com/iusesharepoint/landing.aspx)

Conclusion

Designing or redesigning an intranet takes a lot of time, money and resources. As an intranet manager, you have a lot to look after and be accountable for. This guide will help you plan and manage your resources in the most effective and efficient manner. Armed with this knowledge, you’ll be a confident leader and not be slave to the wishes of an implementation team or the confines of particular software.

It takes patience and perseverance to create a good intranet but the thrill of helping staff and giving them a platform that eases and improves their daily work **is priceless**.

Good luck!