HIT A BULLS-EYE WITH YOUR INTRANET





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Professional Advantage hosted an interactive workshop in September 2014, focussing on how to set up your Intranet to be successful and 'hit the bulls-eye'. During these sessions, audiences were asked to use one word to describe what an Intranet, and in particular SharePoint, means to them.



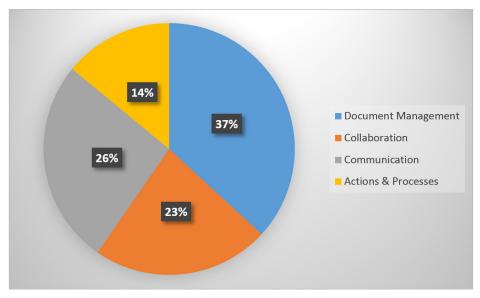
Image 1 – What is one word that comes to mind when talking about 'Intranets'? * Attendees surveyed from event September 2014

There are many reasons why any project can fail, but in essence they all centre around four key contributors: People, Technology, Information and Communication.

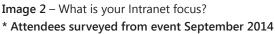
In a perfect world, the people included in a project don't have political agendas, get along perfectly with each other, have all the skills they need at their disposal, communicate well and effectively with each other and have all the technology and resources they need to make the project a success. Sadly, as you already know all too well (or you would not be reading this article), this is rarely the case.

This white paper will focus specifically on Intranet projects, how they can fail, and more importantly what you can do to avoid some of the common pitfalls. It will conclude with some great tips on how to drive the success of your Intranet project from inception through to the continuous success that high user adoption will achieve.





Attendees surveyed from Sydney event September 2014



The case for change

A key to a successful Intranet is to ensure organisational change management principles are applied throughout your implementation – the art of managing expectations, driving behavioural change, communicating openly and ensuring the sustainability of technology and process changes.

The 2014 Prosci Best Practices in Change Management Benchmarking Report surveyed 822 organisations across the globe, and emphasises what many change management professionals have been preaching for decades. The report looks at how organisations have implemented change management practices for their projects. Its findings are quite extensive and some of the key factors include concepts that can easily be applied to Intranet projects. According to their research, "Excellent Change Management programs resulted in faster speed of adoption, greater ultimate utilisation and higher levels of proficiency."

Some successful change management approaches derived from the report include:

- Engage sponsors early and effectively: Early involvement from the sponsors and key stakeholders throughout the whole process is critical as they will own, champion and drive the solution if they are part of the process, and it was not just what IT has implemented.
- Budget for change resources: Ensure that you have identified a resource who will be focussing on the impact to users, and develop ways to help users adapt to the change.

- Emphasise employee buy-in: Users will ask the "What's in it for me?" (WIIFM) question getting their buy-in early will help user adoption when the system is being rolled out.
- Start early in the project: Don't wait until the final stages of a project to raise the question - plan for user adoption early by creating engagement and developing training strategies from day one.
- **Communicate frequently:** Frequent communication and soliciting feedback will allow you to identify barriers early and plan mitigating strategies before it's too late.
- Thorough training and resistance management plans: Don't leave training to the last minute. It takes a lot of work to plan and execute even if formal training will be required. Create online tutorials and cheat sheets to be integrated into inductions and plan for refresher training.
- Integrate change with your project management methodology: Project management often focuses on the tangible deliverables and has its own timeline. Change management will pose a different timeline, and the work involved is often not seen as part of the project. Creating a communication plan, email newsletters, flyers and announcements will all form part of a change management plan but few project managers will include those activities on their timeline – especially when a third party is building your solution.



CHALLENGES BEING FACED?

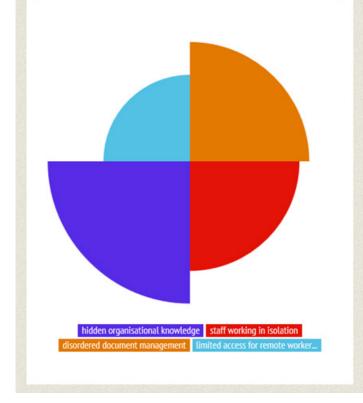


Image 3 – What challenges is your organisation facing? * Attendees surveyed from event September 2014

The importance of Planning and Scope

Often organisations want to implement a new Intranet but have misconceptions regarding the effort involved to make it a success. They commonly assume that a brand new document and information management solution, which integrates with all existing business processes and systems and which will make everyone's lives so much simpler, can be in place within weeks. This symptom is also known as Lack of Planning.

Many failed Intranet projects also try to achieve too much in one go. It is not uncommon for stakeholders to see a brave new world via a demonstration and want to achieve immense organisational and technological change in one swoop. This leads to projects that become unmanageable, are never ending, and which deliver only a fraction of the initial promises, if any at all. This symptom is referred to as Lack of Scoping. To combat these two symptoms of Intranet failure, organising a clear vision, planning and scoping exercise before even starting the project is key. We're not saying we need to go waterfall and define the functionality to the nth degree in a drawn out analysis phase. Please don't! In today's rapidly changing world, where technology changes faster than businesses can hope to adapt, you'd be designing a solution that will become out of date and irrelevant before you've even commenced on the build.

Instead the purpose of the planning phase is to be clear about the big picture goals of the new solution mapped out on a realistic roadmap that is broken down into multiple phases or waves. Here are some key tips on getting the planning phase right:

- Involve key stakeholders from the business in the planning phase - it will be their Intranet, and not the sole domain of the IT department.
- Ensure you identify tangible business benefits that the stakeholders will receive from the new solution. What's in it for them?
 - Benefit 1: Having the capability to co-author a proposal in real time with key participants across the country, across different mobile and desktop devices; now that will push the right buttons for sure!
 - Benefit 2: Being able to compile proposals quicker, responding to tenders better and faster, having extra time for quality control and graphic design - another tangible benefit that will build a business case for a solution.
- Break it down into phases. Each phase needs to focus on very specific goals that are being achieved. Each phase needs to add immediate value to the business.
- Document only what needs documenting. If you have determined that certain business process improvements will be tackled in a later stage, don't spend valuable time documenting those finer details now. Instead focus your documentation and requirements analysis on phase 1 elements.
- Communicate the roadmap early, clearly and transparently. That way end users will get less frustrated when their specific needs are not met instantly, as they will see that they will be addressed in a future phase.



How can you better target your Intranet?

Often, when Intranets fail there are a number of key factors that may have been overlooked. In this section we will take a closer look at four of those key areas that provide insight into how to:

- 1. Define the right Information Architecture
- 2. Build the right governance structure
- 3. Encourage end-user involvement
- 4. Drive and sustain user adoption

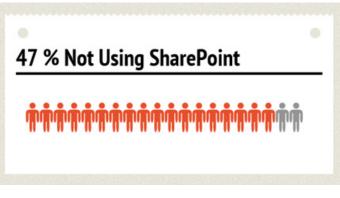


Image 4 - * Registrants surveyed from event September 2014

1. Define the right Information Architecture



Search usability accounted for an estimated 43% of the difference in employee productivity between intranets with high and low usability.

Image 5 – * Nielsen Norman Group "Enterprise Portals are Popping"

Most organisations already have some document or content management solution in place. Whether it is a myriad of file shares or an archaic or restrictive document management system or an outdated or ungoverned Intranet or, even worse, local storage, your users are likely to be already using some form of solution.

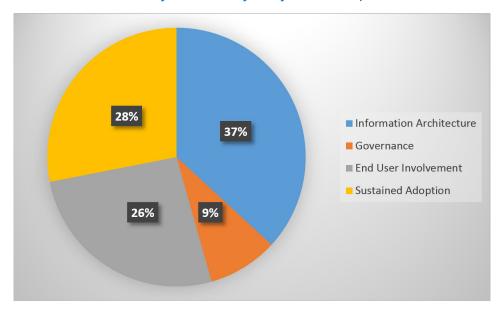
The key first step in defining an effective Information Architecture (IA) is to understand how the users find and feel about the information in their current solutions. This also gives you the opportunity to identify certain groups or roles of users that may not be affected, or are in fact happily using their current solution. This is a key takeaway: an organisation-wide IA re-development doesn't always apply to everyone no matter how strong or compelling the case for change may be. An analysis of the current state will give you an excellent understanding of all of the issues with the current solutions.

Run a workshop with end users to define different ways to store and find information. By conducting it in a group setting they can start to see how much double handling or duplication is occurring. Prior to the workshops distribute and explain audit worksheets and questionnaires. Preparation material of this type helps users think about the information and the current pain points prior to attending the workshop.

This will provide a way to have your Information Architecture defined, documented and agreed upon. Now it's time to think about adoption. Constantly educate and promote awareness with your users about what this change will mean to them. People can become quite content in their own little bubbles and, once you burst these, your new solution better be able to provide similar functionality and then some.



Another important step in the renovation (or demolition) of an existing document and content management solution is to make the changes in phases. Even the most forward-thinking executives can get frightened by the prospect of a big bang organisational migration. Configure the base structure, move the well-defined information first and follow with prioritised consecutive phases of content.



Attendees surveyed from Sydney event September 2014

Image 6 – Intranet Pain Points * Attendees surveyed from event September 2014

Workshop Scenario:

In this session participants described the benefits that information architecture planning would have for their Intranets and their organisations. The pitfalls of missing architecture were also discussed.

Benefits might include being able to find critical information faster; pitfalls might include duplication of content and duplication of effort.

The aim of this session is to not only highlight the benefits of a well-designed Information architecture but also to raise awareness of the impact Information Architecture has on user adoption and the overall success of the Intranet project.



Benefits

Not only will a relevant information architecture provide more accessible and relevant navigation and storage facilities, it will also help provide context, promotion and even facet filtering of search results.

Consider a balanced structure providing navigation and search as interfaces to locate information within the data structure. Different people expect and approach location and storage of information differently. By providing multiple mechanisms such as mega menus, footer navigation, contextual site or audience-targeted navigation for location of information you are accommodating the expectations of a wide variety of end users.

The human brain can remember seven items easily - try to focus on structuring around seven key items. Also bear in mind the unofficial rule for web information architecture - at all times content should be accessible with a maximum of three mouse clicks from the homepage.

Provide a common language for all users; this will simplify the way documents are categorised. Take it a step further by implementing one-to-many tagging; allow enterprise keywords and generation of a folksonomy. This further increases the odds that the end user will be able to store and locate the information effectively.

Investigate and understand existing legacy systems prior to designing your IA. This will provide valuable information about how users currently work with data within your organisation. By focussing on pain points you can very easily work towards a more efficient system.

Risks

Most modern Intranet solutions allow for and promote the collaboration and co-authoring of material. By not having clear locations as to where these activities should happen you can this activity occurring on information that should be quality controlled, introducing risk; conversely, it may not be happening in the locations it could provide the most benefit.

Without a clearly defined and accepted Information Architecture, users will struggle to navigate and find the right information in a timely fashion.

Considering these factors upfront and designing and maintaining an effective Information Architecture significantly reduces the upgrade effort required and improves the scalability of the solution moving into the future. Do the analysis once, do it right and keep it current.



2. Build the right governance structure

Governance is probably the most controversial one of all, as, depending on who you ask you will get vastly different definitions of what it means and encompasses. The level of control that governance exudes can vary greatly from pure control to mere sway. And sadly, there is no silver bullet answer to the extent of governance an Intranet requires, except that it requires governance to one degree or another.

Why do Intranets fail without governance?	Why do Intranets fail when over-governed?
 Users don't know what they can/cannot do Content grows sporadically, organically, chaotically Content is not up to date, timely or relevant to the current business environment Changes become hard to implement as responsibilities are not clear No ownership of the solution, resulting in an orphaned Intranet with no guidance Staff don't develop the skills required to help govern the Intranet 	 Too many hoops to jump through to apply minor changes Staff are discouraged to take ownership of their own Intranet space Permission management is too centralised, making it hard to manage exceptions Change takes forever to trickle through the different environments Solution becomes too rigid and can't adapt quickly to dynamically changing business needs

Ultimately the Intranet project does not finish with the rollout to users, but rather kick-starts a new phase of its lifecycle during which it will grow and evolve. This phase will require maintenance and guidance. Designing a governance plan early in the project that involves all the key stakeholders from the business as well as from IT is important. The components of the governance plan will need to cover:

- Creation of the Intranet Committee
 - Determine who will become members of the committee
 - Responsible for a clear 2-3 year Intranet roadmap
 - Decide how often the committee meets
 - Identify what power and responsibilities the committee has in respect to rolling out changes
- Clearly defined roadmapAll governance activities will evolve around this roadmap
- Training plan going forward
 - Ensuring content, site and IT administrators have the necessary skills to govern
- Content Request Process
 - Allowing users to request a content change
 - Add workflows to ensure new content can easily be added, reviewed and published
- Feature Request Process
 - Define how to handle the need for more major change
 - Wish list form for ad-hoc ideas
 - Structured Intranet project request form for more major solutions
- Permission Request Process
 - Have clear guidelines on who can do what and how to request more permissions
 - Provide documentation on the different roles and responsibilities
 - Provide access to training material

Armed with a clear roadmap, a sound governance plan and a capable Intranet committee, your Intranet will have the stability, structure and processes to grow, adapt and evolve with the business.

Workshop Scenario:

In this workshop the audience deliberated two key governance concepts: The tools required to govern an Intranet effectively and common gaps that can be found in organisational governance plans.

Examples of tools might include a clearly defined training plan, online help and guidance documentation, and FAQ lists. Examples of gaps could include lack of procedure documentation, lack of ownership, and no governance group to steer the Intranet.

The aim of this session is to identify techniques that are working well within organisations and to highlight common pitfalls and risks to avoid.

Benefits	Risks
Provides clarity of ownership for both the overall solution and the ongoing components. With promoted visibility of roles and responsibilities regarding activities such as site content or continuous improvement users will benefit from a clearly defined approach.	One of the risks of not having any governance is that content can become ineffective and lack quality. If users have the ability to update information that should be quality controlled or secure, it will reduce trust for other users of the system.
Governance negates the risk of sites and content spiralling out of control by ensuring that effective controls are in place. That said, it also needs to be flexible enough to ensure users have the opportunity to provide value by creating and collaborating on information.	With no defined ownership of key elements such as news feeds, content can become outdated or may not be relevant to system users. If the organisation's approach is to enforce absolute governance, this can restrict how end users will interact with the solution, and can stifle innovation.
One of the other positives of an Intranet governance team is that it typically provide a business focus to optimisation and further enhancements. This is key to delivering a successful Intranet that grows and matures with the organisation.	
An effective governance structure and plan delivers improved information quality and security.	



3. Encourage end-user involvement

Employees affected by any change need to understand why it is necessary and why the change will benefit both the organisation and them personally. By including them throughout the life of your Intranet journey, you will not only gain valuable insights from those who will be active users, you will build strong advocates that will help drive and sustain its use well into the future.

A good strategy for encouraging end-user involvement is to include impacted stakeholders from the start of your project. Someone who feels they are part of the process, rather than simply a bystander, will be more likely to embrace the change when it occurs and advocate the solution to their network of peers. The ability to provide input into system requirements, process design and end user training requirements will provide real-life validation, as well as provide a feel for how it will resonate with the audiences that it will eventually impact.

Identifying supporters in each business area to act as change champions is a great way to provide additional communications and engagement across your organisation, as well as an informal way to provide education and support to others from a trusted colleague. They can help to provide ongoing informal feedback on how others are adopting the new Intranet, which may lead to follow-up activities as part of continuous improvement, such as additional training.

While it is important throughout the change to seek continual feedback from your Intranet users, it is also important to ensure that those providing the feedback know that they are being listened to and that their suggestions and concerns have, where practicable, been acted upon. When users feel that voicing their questions or concerns will be answered or actioned, they are more likely to provide you with ongoing feedback and be an advocate for the change. A strong feedback loop improves your ability to measure the change, and gives you the opportunity to stop small problems becoming larger issues down the track.

Some great ways to get end-users involved include:

- Conduct Information Architecture workshops
- Identify who will be in your Intranet governance committee
- Delegate training responsibilities to key users to up-skill their team
- Ask users to talk to their team about how they will use the Intranet once it goes live

Workshop Scenario:

In this workshop the participants decided which stakeholders or users they deem necessary to involve early in the project. They drew on both past experience and newly acquired knowledge. The second group identified the potential risks to look out for where end user involvement is concerned.

Examples of stakeholders could include operations managers, C-level officers or factory workers. Risks could range from lack of adoption through to miscommunication and project scheduling difficulties.

The aim of this session is to highlight the different types of stakeholders and the impact they can have when introduced early to the project as well as potential adoption risks and issues to look out for during the project lifecycle.



Benefits

Helps drive early engagement of staff, creating a positive energy and building steady momentum over time. This will also assist with early change management activities relating to stakeholder buy-in and leadership alignment.

Participation in early stages will help ensure the solution better responds to the expectations and needs at an organisational and team level. This helps to get it right the first time, by identifying any issues or information gaps to amend prior to launch.

A bottom up approach gets users involved, allowing them to participate in activities such as workshop, testing or the rolling out of training to others. Involving a wide range of end users also provides opportunities for best practices or common processes to be identified, discussed and shared.

C-level support is needed to help drive corporate ownership and accountability.

Identifying champions that will be early adopters, who are Subject Matter Experts (SMEs) from various departments. Champions need to be influential, knowledgeable, approachable, eager to implement the solution and possess sound communication skills.

Helps to identify what points of resistance may arise so that they can be addressed before they become an issue.

Risks

Unable to capture team specific requirements, leading to gaps in the final solution that may be critical success factors for the impacted team - this will have a direct impact on users' adoption of the solution.

Having too many end users involved can lead to a large and unmanageable scope - "too many cooks" asking for too much too soon.

No upfront involvement from your end users can lead to a lack of commitment to owner responsibilities in the future (i.e. site content, leading to outdated content). Users who were not part of the process may become resistant to the change.

Time-poor staff may not adopt the change without an appropriate level of support (i.e. training time scheduled in advance).

Lack of executive direction and buy-in (top-down) and not ensuring the solution is relevant to end users (bottom up). This may lead to the implementation process being a waste of time, energy and money (delivering no ROI).



4. Drive and sustain user adoption

WHAT DO YOU USE YOUR SHAREPOINT FOR?



Image 7 – * Registrants surveyed from Professional Advantage events over the past 24 months

Many Intranet projects attempt to introduce drastic change to their organisation. New places to find information, new places to put information. New tools to use, new devices to consider and, most importantly, new processes to make it all work. People, process and culture go hand in hand with any Intranet, and are critical to its success. A focus on these areas is important to ensure that user adoption is high from day one and beyond. While commitment to your new Intranet may be high on launch day, ensuring it stays that way is a different matter.

Once live, users will need to move to a new way of doing things, which is why understanding what behaviour changes are needed by your employees to make the shift will be key to success. Without the right level of awareness, guidance and support, they may not change their behaviour. An important point to remember is that users will not be forced to use the Intranet, so unless they make a conscious decision to engage and become an active user you will not see the full benefits that a successful Intranet can provide. In preparing for the launch a good way to drive user adoption is to ensure you have a change strategy in place. The ideal strategy starts early in the implementation for too many organisations change management is an afterthought, coming into play only when the Intranet has gone live, resulting in low user adoption and employees who don't know how to use the new functionality. As go-live approaches, your employees need assistance to develop their skills and be ready to hit the ground running. Providing a combination of initiatives will help to embed the change and may include face-to-face training sessions, quick reference guides or interactive workshops.

You also need to consider identifying and removing barriers that could prevent user adoption and which make it easy for employees to continue doing things the old way – for example, making file shares read only a month after launch will stop the old process. Breaking the cycle encourages users to embrace the new way of doing things and will help reinforce the change, particularly for those who may be resistant to leaving what they know behind.

Measuring and managing user adoption is an ongoing process that ensures users do not revert to old habits. It's important to define what success will look like and set some key change objectives that you can measure against over time to track your progress. Look forward six months after go-live. What needs to have changed in the way your teams work today in order for you to be realising the benefits? While it's important to measure the rate of user adoption at go live, setting regular follow-up activities to measure how user adoption is tracking allows you to identify trends early, and if adoption is falling be able to respond quickly with follow-up activities such as extra training or support.



Workshop Scenario:

This was probably the most creative and vibrant of the workshops. Participants were asked to propose different adoptions campaign strategies and techniques and brainstorm ideas that will help drive user adoption and engagement. On the flip side, participants listed some classic adoption disasters.

Examples of campaign elements included cheat sheets, newsletters and marketing events, while some of the disasters highlighted problems of over-selling and under-delivering.

The aim of the workshop was to build a list of effective adoption techniques while keeping in mind the issues that poorly executed adoption plans can cause.

Benefits	Risks
Helps to keep staff engagement high and provides a continual focus during and after launch activities. This in turn drives adoption and helps ensure a sustained return on investment over time.	If the solution does not meet users' needs, they may start to use workarounds and revert to old processes - remove the ability for users to continue with their old ways. For example, make file share read-only.
Customising adoption campaigns to make sure they resonate with your different departments will help drive adoption. In the short term you could run competitions and incentive programs, which lead in the longer term to KPIs to help sustain the change.	Focusing only on hard data/analytics (i.e. page hits) as a measure of success means that you may miss out on key user experience feedback you would receive through conversations or surveys.
Ensuring the site remains up to date and relevant will help to continually drive and foster adoption. This may include regular news/communications events, social interactions or engagement activities (i.e.	Little or no planning for ongoing user adoption can have a lasting impression on both the users' experience and perception, leading to a slower realisation of benefits.
classifieds, team photos). A simple design will ensure users can find what they are looking for quickly and easily, and help drive the key focus of your intranet. For example a communications-based Intranet may feature news feeds and social tools on its front page.	If user needs are not considered during the design process, users may become resistant as they may feel the solution has been built for them rather than with them. Assuming that you know the wants and needs of your users may mean you miss critical requirements.
Efficiencies can be created via the streamlining and automation of key business processes, ensuring the information being submitted into the process is correct and that errors are reduced or reworked later on.	If there is no ongoing ownership, content can become stale and changes based on continuous feedback cannot be made in a dynamic way. A committee comprised of members with clear roles and responsibilities of ownership is needed to address this.
Keeping track of analytics around user adoption can help measure the success over time, and highlight teams that may need additional support. These may include running surveys / polls or holding follow-up feedback sessions with users.	



Intranet Benefits & Best Practice

The benefits of a successful Intranet might seem obvious to most, but reality is far from the obvious. The key to a successful Intranet lies in defining what success means for your organisation. Each Intranet is as different as each organisation that implements one, and the needs and requirements can differ greatly. Nonetheless, most Intranets focus on one or more of the following four key functional areas:

- Collaboration
- Communication
- Actions & processes
- Information Management

A **highly collaborative** Intranet will focus on working on documents, working in teams, and the sharing of information within teams. Project sites are not uncommon here.

A **Communications-driven** Intranet will aim to provide clear paths to corporate policy and information as well as provide staff with news and updates and the utilisation of new communication channels such as social networking and mobile access. Often the marketing and HR teams will be heavily involved in "getting it right".

An **actions-driven** Intranet has clearly defined purposes. Digital forms guide users through key business processes. Workflows help staff perform segments of the bigger business process. Task lists keep teams on track and reporting allows for faster decision-making processes. These Intranets are more often than not championed by staff in the operations department who are looking at using it as a tool to assist in their day-to-day processes.

An Intranet that focuses on information management will often be document centric. Knowledge is captured in different mediums and business data is integrated into the platform to provide a holistic approach to business classifications and processes. Often these Intranets become integrated with other systems such as CRM or finance systems to enable a 'single source of truth' view of information in the organisation. Often IT is a key driver, backed by the CIO or knowledge manager within the organisation.

One wave at a time

One of the keys to success is to identify each driving force behind the project and to have a clear vision of what the platform should achieve. Attempting to excel in all four areas at once will undoubtedly cause the project team to lose focus and drown the project by attempting too much at once. Instead, each key area that is relevant to your organisation should be tackled in isolation. That could mean that you roll out the solution only to a select group of staff to achieve a direct benefit for them first, or you focus only on communications in the first phase and attempt document management and reporting at a later stage. Applying a staged approach will also ensure that you gain critical skills in adoption planning and governance early in the lifecycle of your Intranet. You can then build on those strengths in future waves and rollouts.

Often organisations ask themselves what to implement in the first wave, and effectively it's the sweet spot between delivering too much at the risk of total failure and delivering too little at the risk of disillusioning your end users. Setting the right expectations and delivering to those expectations will ensure that your users will be excited about the new functionality being proposed.

Choosing the right Partner

When you have the right process, tools and results you achieve great things.

Professional Advantage has an enormous depth of experience and expertise when it comes to Microsoft SharePoint. For more than ten years we have been delivering SharePoint intranets, extranets, websites and mobility solutions for a wide range of public, private and not-for-profit organisations, including NSW Cancer Council, Harbour City Ferries and Panasonic Australia.

A Gold-certified Partner, Professional Advantage has won several awards from Microsoft over the years, and currently hold a Gold certifications including the Collaboration and Content competency with the Microsoft Partner Network.

Our customers are also rewarded, with one of our customer projects, Scott Corporation, accepting a Global Intranet Innovation award for their intranet and many of our other client projects delivering outcomes that are real, measurable and performance-enhancing.

Professional Advantage offers a holistic SharePoint project experience for our customer that includes careful business analysis, user adoption planning sessions, best practice implementations, user centric design approaches, project management and customer specific training delivery.



Enabling High Performance Workplaces

About Professional Advantage

Professional Advantage is one of Australia's most awarded solutions providers, with over 20 years experience in helping organisations improve their business systems through industry leading software solutions. Our 250-strong team in 6 offices across Australia and internationally has successfully worked with over 1000 organisations.

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