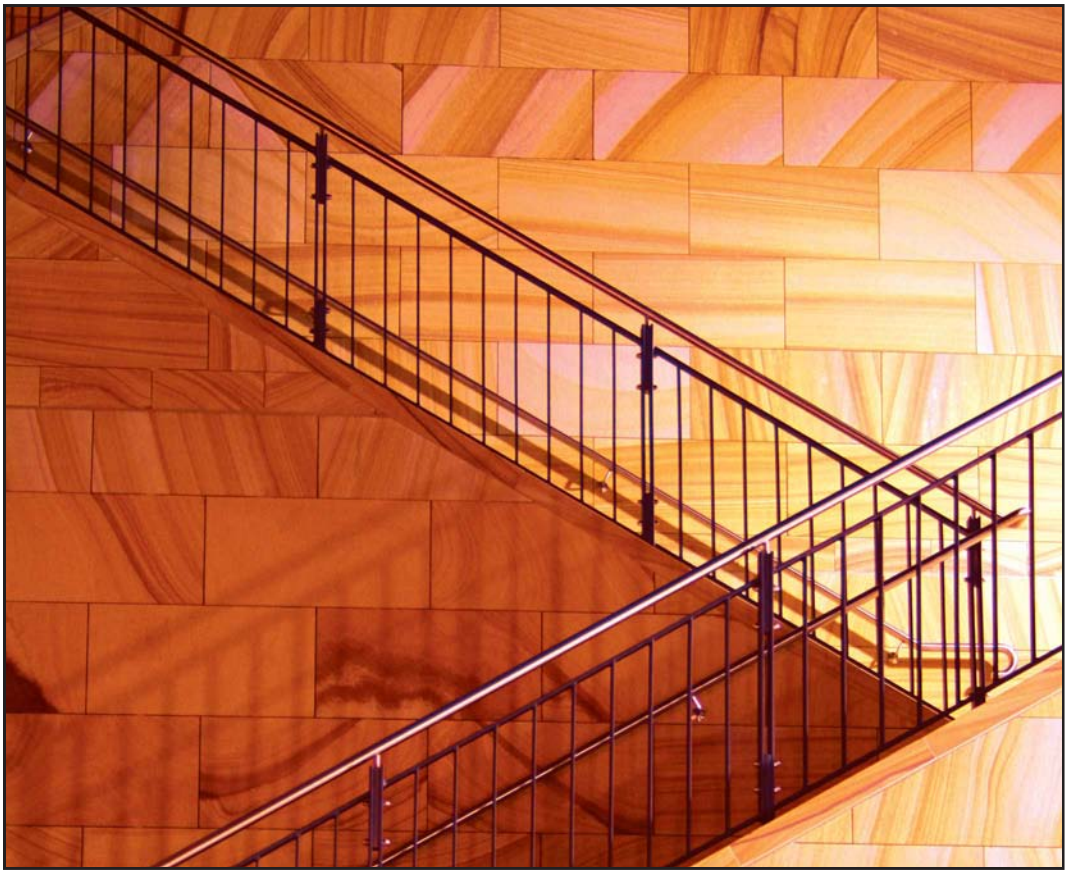

6x2 methodology for intranets

James Robertson

FEBRUARY 2007

Step Two DESIGNS
www.steptwo.com.au

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The 6x2 methodology in detail

Preface

There is no doubt that running an intranet is challenging. Every business area, and every manager, has an opinion about what makes a successful intranet, and where their site should be heading into the future. While these needs and expectations sometimes conflict, the broader problem is the lack of resources available to deliver the desired solutions.

Ultimately, though, intranets *must* succeed. The organisational need for mechanisms to improve business processes, share knowledge and support staff in their daily work is constantly growing. Many organisations have realised that they cannot operate without an intranet (whatever it might be called).

If intranets are to be successful, then intranet teams must be effective. More than that, they must be productive and feel that they are making an impact on the working practices and productivity of staff across the organisation.

We have worked with many intranet teams in both the public and private sectors. This includes Fortune 500 companies, charities, universities, local government bodies, government departments and more.

In all these cases, our task has been to support intranet teams and to assist them to succeed and prosper. To that end, we have steadily worked on developing ideas, tools, techniques and approaches for the use of these teams. Many of these have been documented in articles or reports, while others are communicated more informally.

The *6x2 methodology* represents the latest product of this ongoing evolution in our thinking and practices. Interestingly, it is our smallest methodology yet, and the one most focused on the 'here and now'.

It is ruthlessly pragmatic, concentrating on getting intranet teams 'across the line' despite the challenges confronting them. We have already used it with small teams setting up an intranet for the first time, as well as with intranet teams struggling to bring order to dozens (or hundreds) of intranets scattered across the corporate environment.

Undoubtedly there will be elements that will challenge the assumptions and beliefs of some intranet teams. So much the better, as managing intranets must become less *stressful* than it currently is for most intranet teams, and this will involve revisiting some of our standard practices and approaches.

Ultimately, we share this methodology in the hope that it will be of some practical use for intranet teams. While every intranet team needs to take its own path, we nonetheless believe that there will be key ideas and elements that can be put to use on any intranet.

James Robertson, January 2007

Introducing the 6x2 methodology

Fundamentally, intranet teams are confronted with many business needs and intranet issues, with insufficient resources and support to solve them. With little recognition of the value of the intranet, it is often very difficult to gain the required additional funding (and other resources).

The result is that intranet teams work hard from month to month, but make little apparent progress on the longer-term objectives for the site. Meanwhile, it can be difficult for the intranet team to maintain energy levels and enthusiasm, resulting in many 'burnt out' intranet teams.

The 6x2 methodology works within these constraints to provide a practical approach for intranet planning that delivers additional intranet functionality while building support for the intranet team.

At the heart of the 6x2 methodology is a focus on the coming six months. More than just steadily working on longer-term activities, this approach asks: what can be *delivered* in the next six months? In answering this question, it also identifies those activities that are not just doable, but also *worth doing*.

Detailed project planning is used to ensure that the selected items are actually achievable, as well as giving a clear sequence of activities. The possible activities are then sketched out for the following six months (thus the '6x2' name), giving the intranet team a roadmap for the coming year.

All of this is then used to create a compelling briefing for senior management, as well as a communications message for the wider organisation.

This is a cyclic process, with each six-month period of activity leading into the next. Underlying this is a steady buildup of momentum for the intranet, giving an 'upwards spiral' that allows more to be done in each six-month period.

In this way, the intranet team can steadily work on ever-larger needs and issues, even when the starting point is extremely constrained. They no longer need to wait for the 'right conditions' to arise — instead the intranet team can act constructively and proactively to build an increasingly effective intranet.

This methodology provides a simple and pragmatic approach that can be used by intranet teams of any size (from one person to a dozen or more). It is equally applicable in private and public organisations, and the more complex and difficult the intranet, the better the approach works.

6x2 methodology at a glance

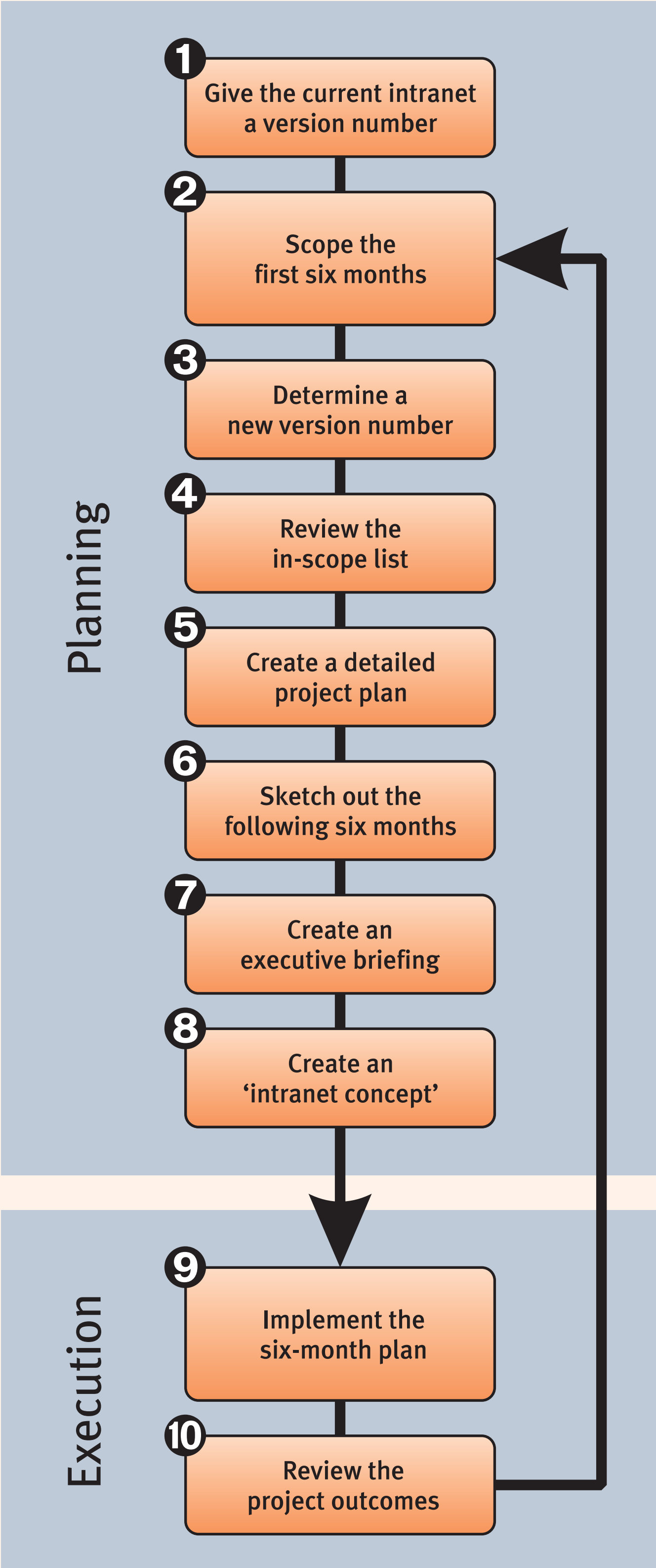


Figure 1: The 6x2 methodology at a glance.

The diagram above outlines the 6x2 methodology, consisting of ten steps from planning through to execution. The approach is then cyclic, with each six month period leading into the next round of planning.

Taking what is most useful

The 6x2 methodology is not intended to be rigid, and does not need to be followed exactly. Instead, intranet teams are encouraged to adapt the approach to fit the unique cultures and environments of their organisations.

Alternatively, it may be valuable to just take some of the core concepts in this approach, and to use these to shape the overall planning and management of the intranet.

The key ideas:

- give the current intranet a version number (eg 3.0)
- break intranet planning down to six-month periods
- identify functionality or content that can be *delivered* within six months
- determine the criteria and constraints that will determine what to include
- focus on delivering *tangible* and *visible* improvements
- convey the scope of the activities by giving the planned intranet release a version number (eg 3.1)
- create an executive briefing that states where the intranet is at, where it is heading, and what will be delivered in the coming six months
- create a one-page sheet that communicates well to the wider organisation

These concepts underpin a new approach to intranet planning that highlights the importance of delivering new functionality and content, rather than just maintaining the current site.

Note that this methodology is also steadily evolving, drawing upon the experiences of an ever-greater number of organisations. The 6x2 methodology is therefore not the last word on the intranet planning, but a trigger for a new wave of discussion and innovation in how intranets are managed and enhanced.

You can take from this document the elements you find most useful, and use them to improve the planning of your intranet.

How to use this report

This report contains both underlying concepts and how-to instructions.

Part A (page 6) contains the core principles that underpin the 6x2 methodology. This can be skipped if you are in a hurry, but you should revisit it when you can.

Part B (page 20) provides high level step-by-step instructions on how to use the 6x2 methodology in practice.

Part C (page 36) covers the 6x2 methodology in greater detail, with supporting suggestions and guidelines.

PART A

Core principles

This section outlines the core principles that underpin the 6x2 methodology.

If you want to jump straight into the methodology itself, skip to Part B on page 20. (But do come back to this section afterwards.)

Principles behind the 6x2 methodology

The 6x2 methodology is drawn from working with many intranet teams, and observing the intranets of a far greater number of organisations.

What can immediately be seen from this perspective is that almost every intranet team is wrestling with the same challenges and constraints. It is very clear *what doesn't work*, but it is harder to identify an approach that will be successful in the face of what can appear to be insurmountable issues.

The 6x2 methodology is designed to provide intranet teams with a much needed framework for planning intranet activities, and it is built on a number of core principles and observations.

A review of the current state of intranets and the challenges facing intranet teams will provide a clear context for the approach taken in the 6x2 methodology.

Common intranet problems and barriers

Most intranets are suffering from one or more common problems, regardless of whether the organisation is large or small, or whether it is in the private or public sector. While every organisation has at least a few unique challenges, the same problems are seen in many organisations.

These problems can include:

- *Intranet is just a collection of unconnected sub-sites*, with little overall management or structure. This is particularly in large or decentralised organisations.
- *Information is unstructured, out-of-date and duplicated*, with content problems affecting most of the site.
- *Publishing processes are fragmentary and ineffective*, with a mix of inexperienced authors and few overall publishing policies.
- *There is little executive sponsorship*, and the intranet is not recognised as a key business tool or core piece of infrastructure.
- *Resources are very limited*, with some intranet teams operating with zero recurrent budget.
- *Insufficient technology underpins the intranet*, such as no site-wide content management system or effective search engine.
- *Lack of clarity about the role of the intranet*, with potentially competing technologies, platforms and business interests.
- *No overall information management strategy exist*, which would determine future directions and platform choices.

- *There is an intranet team of one*, or even fewer, with the intranet manager having to devote some time to other operational tasks.

These problems are significant barriers that reduce the intranet team's ability to deliver an effective and successful site. At the end of the day, they all boil down to: *there is much to be done, but few easy options and too few resources*.

In many ways, these problems are the results of the way intranets have been managed up to this point, and the changing nature of organisational environments. In tackling these issues, the 6x2 methodology is not a 'fudge' or 'workaround', but rather a fresh (and strategic) way of planning intranets to maximise the ability of intranet teams to add real value.

Tip!

Intranet teams in larger organisations may find managing an intranet even more challenging than their counterparts in small to medium-sized firms. While resources are generally greater (at least in theory), a huge organisation often consists of several major 'silos', along with hundreds of business units.

In this situation, it may not be clear what the overall strategy is for the organisation itself, let alone what a coherent intranet strategy would be, given the very different needs of the numerous business units.

The 6x2 methodology is perhaps even more relevant in large organisations. When the scope of potential activities is so huge, the intranet team must redouble their discipline and focus to ensure that their efforts are not lost without trace.

Struggling to deliver big improvements

In the face of these constraints, intranet teams still aspire to deliver significant improvements to their sites, such as:

- Redesigning the entire intranet, including new information architecture (site structure) and page layouts.
- Selecting and implementing a content management system.
- Developing an intranet strategy (or even more broadly, an information management policy).
- Obtaining a consistent look-and-feel across all intranet applications and systems.
- Defining (and enforcing) intranet policies and guidelines.

Many of these projects may take more than a year, alongside day-to-day maintenance and management of the current intranet. Progress, however, is slow. Organisational issues, resource constraints and internal politics all conspire to drag down these longer-term projects.

The result is that months may pass without any apparent improvement to the design or management of the intranet. Meanwhile, the intranet team is fighting battles on multiple fronts, trying to gain the required resourcing and support.

The net result is that in too many cases, intranet teams 'burn out'. The constant struggle against apparently immovable constraints drains intranet teams of their energy and enthusiasm, leaving them struggling to face further battles.

Alternatively, intranet teams may wait for the 'perfect conditions' to arise, where the organisation finally recognises the value of the intranet and provides the required resources and support. This day, however, never comes.

Creating an upwards spiral

One of the fundamental principles underpinning the 6x2 methodology is the *upwards spiral*, where each success (no matter how small) leads onto further improvements.

This is shown in Figure 1, and it works as follows:

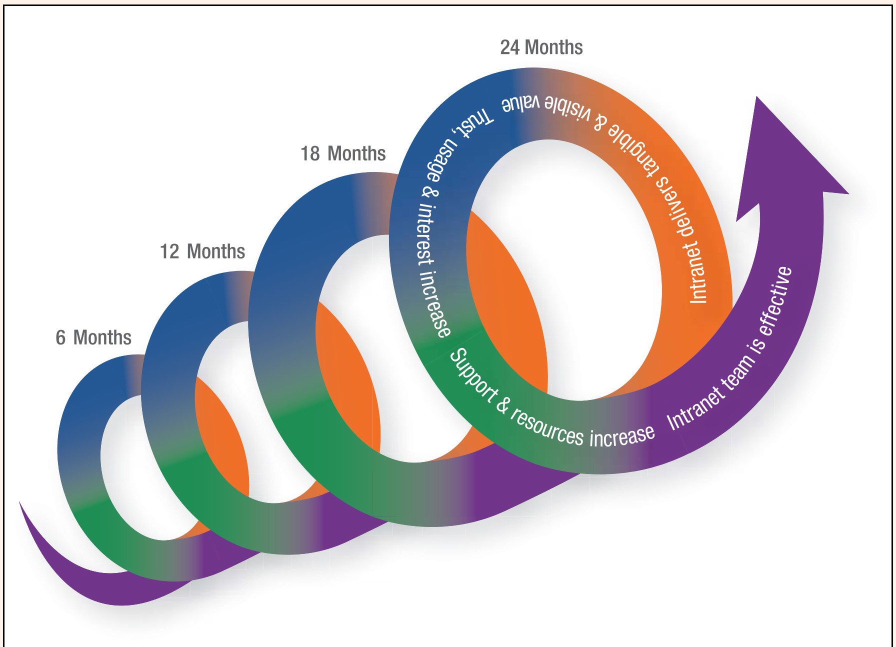


Figure 1: The 'upwards spiral' model provides a framework for progressively tackling ever-larger intranet needs and issues.

- The intranet team delivers new content and capabilities that generate *tangible* and *visible* benefits (see page 12 for more on this).
- This enhances the levels of trust, usage and interest, amongst end-users (staff), content owners and stakeholders.
- Having demonstrated their ability to add value, the intranet team is able to gain some additional support and resources.
- The intranet team is therefore a little more effective, and better-placed, to support the ongoing improvement of the intranet.
- This allows the intranet team to deliver the next pieces of new functionality, and so on…

At the end of each turn of the spiral, new functionality or content is delivered that helps position the intranet (and the intranet team) for the following six months.

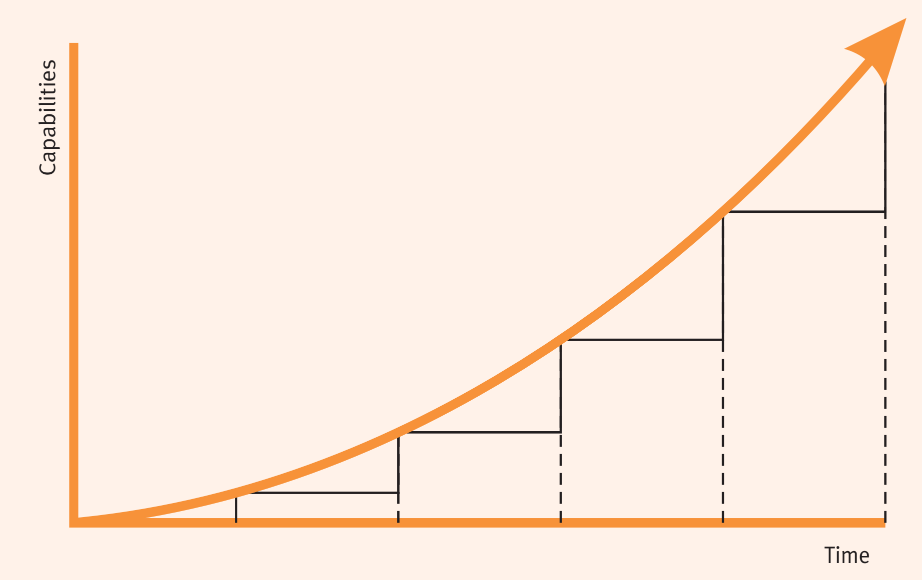


Figure 2: The 'upwards curve' is another way of looking at the same progressive growth in capability and resources.

Initially, the size of the improvements may be very small, almost certainly much less than the intranet team would hope for. The idea though is that, even though the process starts slowly, momentum is being built up at each turn of the upwards spiral.

This gives us another way of looking at the process, as shown in Figure 2. While progress is barely apparent initially, the building momentum generates an upwards curve that ensures (all going well) that the 'big issues' will be tackled as time goes on.

Six months at a time

A key element is to set aside (for the moment) the longer-term considerations, and to focus on the next six months. The goal is then to carefully select the activities for this six-month period, so as to build support for the intranet, and to build the resources for the intranet team.

The lifetime of the intranet is broken down into these six-month periods, because it is vital that the intranet team is seen to steadily deliver solutions.

In the 6x2 methodology, the upcoming six months are carefully scoped and planned in detail. The following six months are then outlined (at a high level), giving a whole year of intranet planning (thus the '6x2' name).

This is more than just targeting the 'low hanging fruit', which implicitly focuses on activities that are easy to do, whether or not they are worth doing. Instead, this methodology uses a simple *scoping technique* to identify those activities that are both doable and worth doing.

> **Tip!**
>
> 'Low hanging fruit' or 'quick wins' can be a significant trap for intranet teams. Since it can be very difficult (or impossible) to make real progress on the 'big issues', teams may focus on the idea of 'quick wins': those things that the intranet team can actually deliver, and quickly.
>
> The problem is that while they may be easy to deliver, they may not be worth doing. Even more significantly, these quick wins may not generate the needed momentum for the intranet, and may not help the intranet team to tackle the bigger picture.

A new metaphor

For the last decade, the dominant metaphor for intranets is that they are an *internal website*. This naturally leads intranet teams to focus on the content, structure and design of the site. The challenge is to ensure the usability of the site, while building sustainable publishing processes that will deliver high-quality content.

This metaphor, however, can only take us so far.

Like painting a bridge, no sooner does the intranet team finish one round of review and auditing then they need to start again from the beginning. Following this 'internal website' metaphor means that intranet teams spend all their time simply *maintaining* the current site, and this legacy is handed down from one team member to the next.

While significant progress was made on intranets in the early years, it can be argued that this progress has stalled. Over the past few years, intranets have improved in design and usability, but not so significantly in terms of functionality or value.

Further improvements can be fostered by letting go of the 'internal website' metaphor, and moving towards a metaphor of 'version numbers'. Like the continual upgrading of a typical piece of software, every version adds some new functionality and fixes some bugs.

When viewed in this way, the intranet is continuously improving, with every 'release' further positioning the site as a business tool rather than a website. Intranet teams can then position themselves as problem-solvers within the organisation, capable of addressing a wide range of business problems and needs.

Problem solving

Taking this approach positions the intranet team as 'problem solvers' rather than 'site owners'. This gives the team the freedom (and the mandate) to seek out opportunities to add value to the business, or to resolve problems.

This is a much more proactive role, and a much for satisfying approach for the intranet, who are no longer boxed into a narrow maintenance role.

This is not to say that the intranet team should look to ursurp the role of the business analysis or e-business teams. What it does mean, however, is that the intranet team should look for opportunities to use the intranet to resolve issues that would otherwise be left unaddressed by existing initiatives or projects.

Tangible and visible

Intranet teams should be guided by two words when planning intranet activities: tangible and visible:

- *Tangible:* the intranet team can clearly demonstrate the impact or value that the activity has had on the organisation. This is about delivering business benefits, beyond the intranet itself.
- *Visible:* the improvement can be seen and recognised by a large number of staff, ideally the organisation as a whole. Better yet, the improvement should target an area that the organisation cares about (often the front-line environment or core business areas).

This is shown in Figure 3, and discussed in the following points:

- *Collaboration for project teams* (tangible and somewhat visible): in many organisations there is a clear need to better support the work of project teams, and collaboration tools can be a valuable way to do this.
- *Improving search* (tangible and visible): this can be a widely recognised improvement, particularly if there are serious problems with the current search engine.
- *Implementing online forms* (tangible and visible): replacing even a few heavily used PDF forms with actual online forms can deliver clear benefits for a large number of staff.
- *Improving the staff directory* (tangible and visible): often the 'killer app' on intranets, improvements to the staff directory (such as staff photos) are both tangible and visible.
- *Creating a new call centre solution* (tangible and visible): as the primary point of contact with customers, improvements to call centre intranets can have a dramatic impact on customer satisfaction and call centre productivity. While these benefits are only for a small number of staff, they can be clearly communicated to the wider organisation.

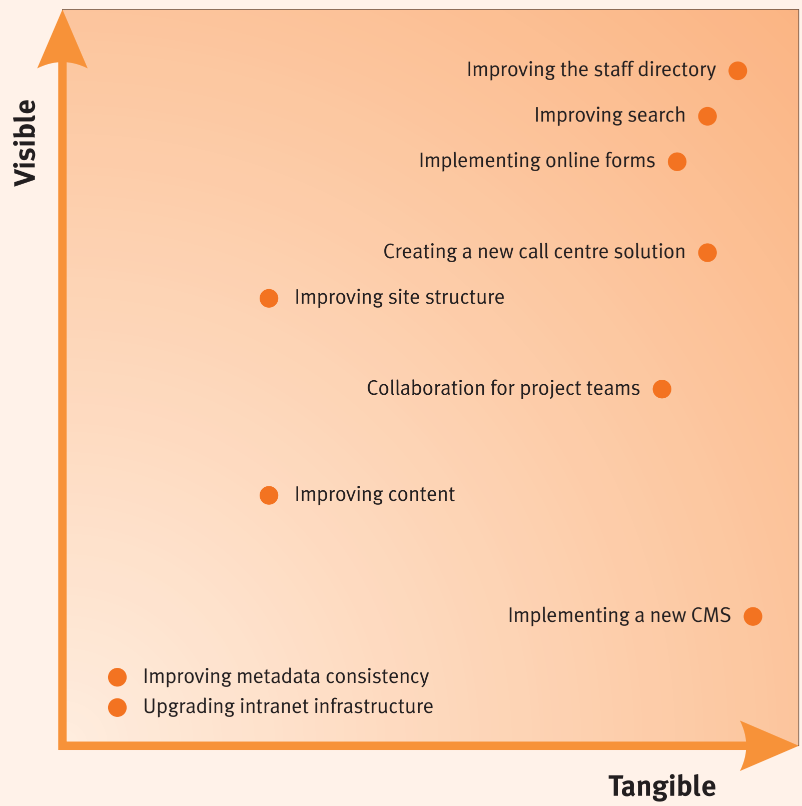


Figure 3: Not all activities are both ‘tangible’ and ‘visible’.

- *Improving metadata consistency* (not tangible or visible)*:* it is difficult for the intranet team to explain this activity, let alone to demonstrate the value to the wider organisation.
- *Implementing a new CMS* (tangible but not visible): this provides direct benefits to the organisation, but these improvements are only felt by the several dozen authors and site administrators, not the wider organisation.
- *Improving the site structure* (visible but not necessarily tangible): while this can address core user issues with the site, it can be hard to explain what has been done and the effort involved.
- *Upgrading intranet infrastructure* (not tangible or visible): new servers may be important for performance and reliability, but these improvements are completely invisible to the organisation, and highly technical in nature. (They may only be visible if there are significant reliability or performance issues with the current intranet servers.)
- *Improving content* (not strongly tangible or visible): where intranet content may desperately need updating and rewriting, this is often a long-term activity that can be hard to clearly communicate.

Use these principles to evaluate planned and current activities, to ensure that the intranet team is building momentum for the intranet.

Also consider including ‘delivers tangible and visible benefits’ as one of the criteria when scoping activities. This will ensure that the intranet team retains a focus on these two key principles throughout the planning process.

(Note that with careful planning it may be possible to convert some activities to be both tangible and visible. This may involve refocusing efforts, or designing them in a way that can be more strongly communicated. At the very least, invisible but important activities can be paired with more tangible and visible deliverables.)

Culture change vs deliverables

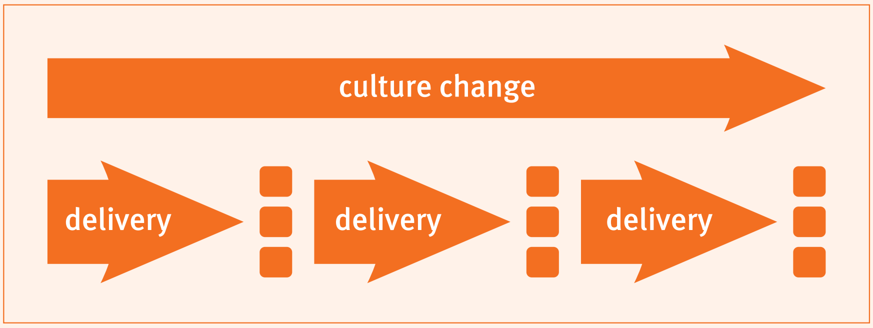


Figure 4: While cultural change can be a long-term objective, it must be supported by regular delivery of new functionality.

Intranet teams often devote considerable effort to creating the right *conditions* for a successful intranet. These cultural change efforts may include:

- building support with senior management
- establishing overall governance models
- creating a steering committee involving branch heads
- conducting training for intranet authors
- evangelising the value of the intranet

While these activities are important, they will not ultimately create the desired effect rapidly enough.

This is not, of course, to say that cultural change activities should be abandoned. Without them, there will certainly not be an overall shift in the way that the organisation interacts with the intranet. These activities will, however, only deliver benefits in the long-term.

Cultural change activities should therefore be run in parallel with the delivery of new functionality, with the cultural work given a lower priority. This ensures that the intranet team itself becomes more effective, ultimately giving more resources for all activities, including the required cultural change.

(The intranet team also needs to assess how well-placed they are to take on these cultural change activities, within their current remit and skill sets.)

Benefits of the 6x2 methodology

The 6x2 methodology is designed to be very practical and pragmatic, and can be used by any intranet team, no matter how difficult their current position. Used effectively, the methodology:

- *Creates a clear roadmap* for the intranet team, both for the next six months and into the future.
- *Provides a simple project management approach* for the intranet, even though the intranet is a 'lifetime' activity that must be sustained rather than a short-term project with a clear delivery date.
- *Works within constraints* that exist for the intranet and intranet team. Even when these constraints are very tight, practical activities can be found.
- *Makes assumptions explicit*, allowing the intranet team to adapt to changes in resources or other constraints.
- *Builds momentum* for the intranet and intranet team, by focusing on tangible and visible improvements that will generate additional support and resources.
- *Builds credibility* of the intranet team, by demonstrating that there is a clear and practical plan for managing and growing the intranet.
- *Helps to communicate intranet activities*, by providing a clear set of criteria and an overall roadmap.
- *Sets senior management expectations*, by clearly stating the short-term resources required while highlighting the need for ongoing activities.
- *Sustains the enthusiasm of the intranet team*, by focusing efforts on activities that can be delivered (and are worth delivering).
- *Clearly articulates the contribution of the intranet team*, by documenting what has been delivered in terms of additional functionality or content.
- *Supports the personal achievements of each team member*, by giving clear targets and activities for each six-month period.
- *Works around lack of clarity about future directions* by making this another constraint to be factored in. There is no requirement to first decide future directions before immediate decisions can be made.
- *Matches the rate of change* within many organisations, by providing a planning framework that can easily adapt to new technologies or platforms.
- *Recognises the shortening of product lifecycles* across the whole industry, thereby taking an approach that matches the overall pace of the organisation as well as meeting ever-increasing expectations on the speed of 'internet time'.

Don't forget the intranet manager

While the intranet team's focus is naturally on improving the site they manage, it is important not to forget their own levels of satisfaction and happiness. In particular, the intranet manager must ensure that they are happy in their roles, and that they see that they are getting value of out of their jobs.

This is more than just warm-hearted rhetoric. Unless the intranet manager sees that they are progressing with their careers, they are likely to move on to other organisations or roles.

While the transition to a new intranet manager may bring the benefits of fresh ideas and approaches, any new manager must rebuild from scratch the relationships and knowledge that are a prerequisite for being effective. In practice, it takes many months before the intranet team re-stabilises, and is able to get stuck back into key projects.

There is no obvious promotion path for an intranet manager, so steps must be taken to ensure that the role grows and evolves in a way that keeps the manager challenged and satisfied.

For this reason, time should be allocated for intranet managers to review their current positions, and to identify where they want to go in the future. This should be factored into the 6x2 planning, and the scoping process in particular.

For example, in one organisation where the intranet team was mentored through the 6x2 methodology, the intranet manager identified the following personal goals:

- Contributing value, more than just treading water
- More achieving, less doing
- Greater confidence, direction and structure
- More credibility
- Management role, not operational
- Leading a team (and building leadership skills)
- Further developing intranet-related skills
- Winning: happy, having fun

Experience across organisations has shown that these are common goals for intranet managers, and they reflect the specific characteristics that generally define successful intranet managers.

In this instance, the goal was that the growth of the intranet would lead to growth of the intranet team, thereby giving the intranet manager an opportunity to be just that: a manager of a *team*.

In this way, the activities can be chosen to just to build the intranet, but to build the role of the intranet manager. This does much to avoid the all-too-common 'burnout' of intranet teams, and beyond this, should improve the overall effectiveness of the intranet manager.

Intranet teams (and managers) should also evaluate what skills they need, and compare these to current skill sets. Building the skills and experience required to be more effective as a team (and as individuals) should then be an ongoing activity.

Gaining mentoring support

It can be difficult for intranet teams to step outside the day-to-day running of the intranet, and get a fresh perspective on how best to improve the site. Because of this, intranet teams may find it hard to generate truly new outcomes when using the 6x2 methodology, particularly during the scoping process.

For this reason, it is often most effective to gain some external support during the planning process. This is best provided as *mentoring*, where teams (or individuals) gain assistance from an advisor (or mentor).

In this way, the intranet team (and the intranet manager in particular) can gain the support of a facilitator and advisor during key phases of the project.

There are many ways that an intranet team can obtain mentoring support, including:

- *Support from another intranet team*. Relationships can be built with an intranet team in another organisation, who can provide a fresh perspective at key points in the planning process. In practice, the amount of support can be limited to specific points of need, and repaid in kind when required. (This type of support works particularly well in the public sector.)
- *Support from another business area*. The intranet manager may be able to establish a mentoring relationship with a manager (or equivalent) in another business area. While this support would be more general (as the mentor may have limited intranet experience), it may still be of great value during the brainstorming and scoping processes.
- *Support as part of a corporate mentoring program.* A growing number of organisations provide a formal mentoring program for managers and senior executives, and the intranet manager may be able to benefit from this. While these programs target the leadership skills of the individual (rather than being focused on the intranet), this may nonetheless be useful and relevant.
- *Specialist intranet mentoring*. Step Two Designs (www.steptwo.com.au) has a well-established mentoring programme for intranet teams based in Australia and New Zealand, with a network of associates in other regions. As the creators of the 6x2 methodology, Step Two Designs are well-placed to support the planning process.

Beyond the planning processes outlined in this report, mentoring can provide considerable ongoing benefits to intranet teams. For example, mentoring can assist with:

- introducing new ideas or approaches
- providing advice on intranet best practice

- building skills within the intranet team
- offering direct support during key activities
- giving access to the experiences gained in the wider industry
- connecting intranet teams with peers in other organisations
- sharing experiences with other intranet teams

Even where the mentoring is provided on a peer basis from a similar organisation, valuable lessons can still be learnt. While few (if any) organisations have all the answers, every intranet team has at least a couple of really powerful ideas or approaches that would benefit other teams.

By 'trading' these ideas, intranet teams can do much to support each other, and to improve the effectiveness of approaches such as the 6x2 methodology.

Tip!

Within Australia and New Zealand, intranet teams can gain support from Step Two Designs:

- *Intranet mentoring programme*. Step Two Designs has a well-established mentoring programme designed specifically for intranet managers and their teams. For more information on this: *www.steptwo.com.au/mentoring*
- *Intranet Leadership Forum*. This is a professional community for intranet managers and their teams. Run throughout Australia and New Zealand, the Forum provides quarterly face-to-face workshops, supported by online discussions and resources. For more information: *www.IntranetLeadership.com.au*

PART B

The 6x2 methodology

This section provides an overview of the 6x2 methodology, and is designed to be a ‘work guide’ to support the intranet manager when working through the steps.

(More information on each step is provided in Part C on page 36.)

Work guide for the 6x2 methodology

While this report devotes considerable space to exploring the key principles behind successful intranet management and growth, the 6x2 methodology is fundamentally a practical approach for intranet teams.

To assist with the implementation of the 6x2 methodology, this section provides a 'work guide' that summarises the core steps of the methodology. Refer to this when conducting the planning session that is at the heart of the 6x2 methodology, as well as using it to guide the rest of the process.

While the rest of this report will need to be read only once, return to this section at the beginning of each six-month period to be reminded of the individual steps.

> **Tip!**
> More information on each of the steps is provided in Part C of this report (page 36). Cross-references are made from each of the steps to the supporting chapters. Use these to answer questions or issues that arise.

Preliminary needs analysis

Before starting the 6x2 methodology, conduct sufficient *needs analysis* to build a strong understanding of the issues and requirements of staff throughout the organisation (as well as understanding strategic business considerations).

More information!
See page 37 for detailed information, guidelines and tips.

A range of techniques should be used:

- staff and stakeholder interviews
- workplace observation
- contextual inquiry
- surveys
- focus groups

These techniques focus on identifying the day-to-day issues and needs of staff. This will generate a large number of ideas for potential improvements to the intranet. The needs analysis will also help the intranet team understand the environments staff work in, guiding the assessment of how practical and valuable potential activities may be.

(See over the page for some sample questions to use during the one-on-one interviews.)

Time should also be spent with senior management to identify overall business goals and drivers. These will guide the selection of criteria for what to include in the coming six months (more on this later).

Sample interview questions

- What is your job role?
- How long have you been working for the organisation?
- What are the main activities that make up your job?
- What information do you rely on during a normal working day?
- Where do you obtain this information from?
- If you have a question, where do you go to find an answer?
- Do you have policies or guidelines for your work?
- How do you get access to these?
- What training or induction did you receive when you started at the organisation?
- How do you find out about what's happening in the organisation?
- Which sources of news do you regularly read?
- What news stories are you most interested in?

The primary purpose of this initial needs analysis is to identify possible activities to be evaluated as part of the 6x2 planning process. This ensures that a broad range of potential activities is captured, drawn from the day-to-day needs of staff.

The 6x2 methodology at a glance

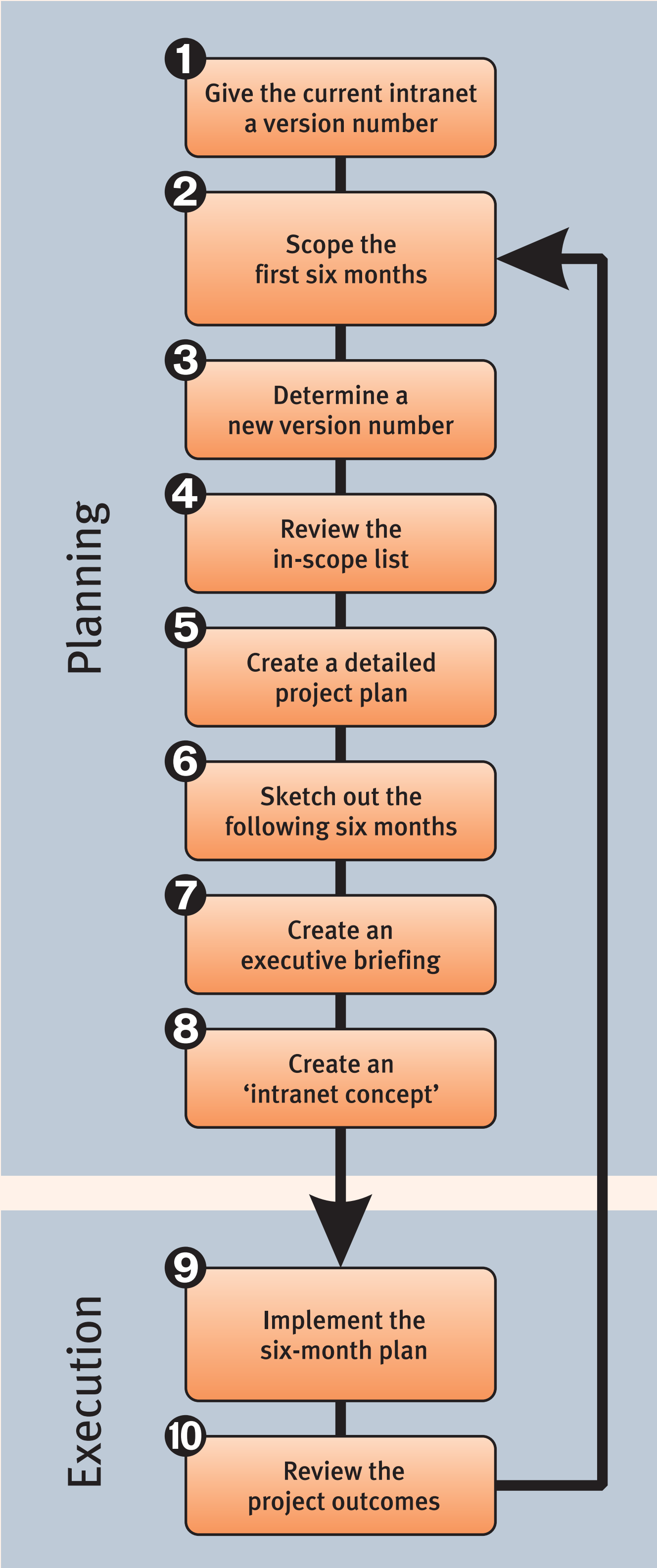


Figure 5: The 6x2 methodology at a glance.

Each of these steps is described in the sections that follow. Supporting information (including guidelines and suggestions) can be found in Part C, starting on page 36.

Step 1. Give the intranet a version number

Start by giving the current intranet a version number. While necessarily somewhat arbitrary, a version number defines a starting point from which to measure future improvements.

For example, the following version numbers could be used:

- *Version 1.0*, if the intranet has been recently launched
- *Version 2.0* or *3.0*, if the intranet is well-established
- *Version 4.0* (or higher), if the intranet is mature and moving towards the next stage of its evolution

> **Tip!**
> This is an optional step, as the use of version numbers may not be meaningful or useful within your corporate culture. If this is the case, version numbers can be omitted without impacting on the rest of the 6x2 methodology.

More information!
See page 48 for detailed information, guidelines and tips.

Step 2. Scope the first six months

The core of the 6x2 methodology is determining what functionality or content will be delivered in the coming six months. These activities will be chosen through the use of a simple but powerful scoping technique.

The core of the scoping process is built around four key elements:

- *criteria* for what to include in the coming six months
- *constraints* that will limit intranet activities
- *possible activities* to include
- *final list* of in-scope activities

By the end of this initial phase, there will be a clear list of activities that will be conducted in the coming six months.

There are six steps in the scoping technique:

2.1 organise a scoping workshop
2.2 identify the criteria
2.3 identify constraints
2.4 list content and functionality ideas
2.5 evaluate ideas based on criteria and constraints
2.6 compile agreed list of activities and enhancements

Each of these steps is summarised in the following sections, with supporting information available in Part C on page 49.

More information!
See page 49 for detailed information, guidelines and tips.

2.1 Organise a scoping workshop

Organise a workshop for the whole intranet team, along with other key stakeholders such as the intranet sponsor, and IT representatives. Make sure there is an electronic whiteboard available (or equivalent), and set aside enough time to allow the whole scoping process to be conducted in a single session.

More information!
See page 50 for detailed information, guidelines and tips.

2.2 Identify criteria

The starting point for the scoping session is to identify the *criteria* for what activities to conduct in the coming six months. Brainstorm a list of possible criteria, using the following questions to guide the discussions:

- *Why would we choose something for inclusion in the next six months?*
- *What would make us choose one item instead of another?*

More information!
See page 51 for detailed information, guidelines and tips.

The list of sample criteria on page 26 can be used to kick-start the brainstorming process, but care must be taken ensure that the session doesn't just become choosing items out of this list. In practice, the best criteria are those that match the specific (and often unique) circumstances of the organisation.

Use the electronic whiteboard to write up all of the possible ideas, avoiding the temptation to evaluate or discuss each item as it is noted down (remember that this is a brainstorming session).

Once all the possible criteria have been identified, select the *six most important criteria*. This will help to focus discussions when evaluating potential activities. These selected criteria can be marked on the whiteboard as shown in Figure 6.

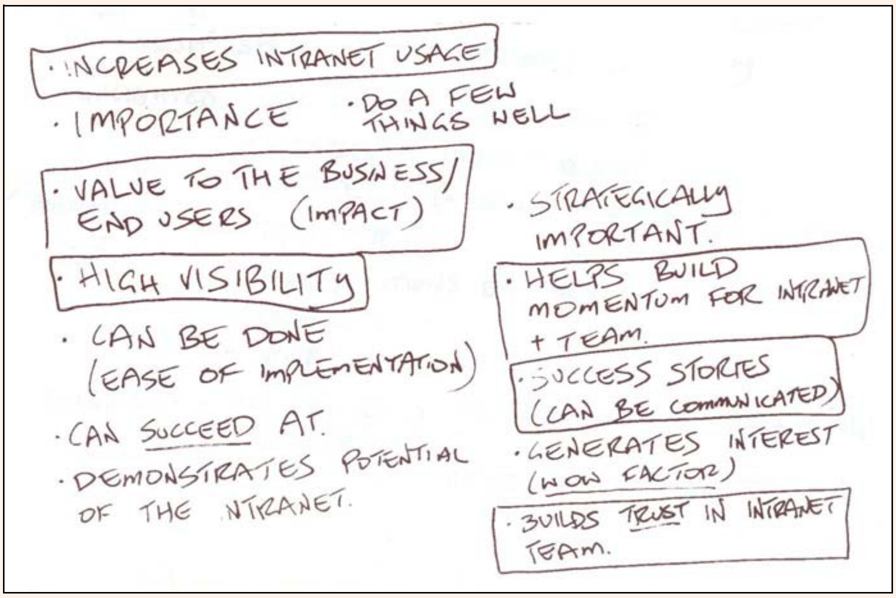


Figure 6: Criteria identified during one scoping process in a large private-sector organisation, captured on an electronic whiteboard.

Sample criteria

- Increases intranet usage
- Delivers value to the business/end users
- Do a few things well
- Demonstrates the value of the intranet
- Builds momentum for the intranet (and intranet team)
- Relevant to the whole organisation
- Must be useful
- Strategically important
- Delivers tangible and visible benefits
- High visibility/impact
- Generates interest and enthusiasm
- Creates success stories (that can be communicated)
- Builds trust (and confidence) in intranet team
- Conveys the longer-term direction of the intranet
- Demonstrates the intranet as a core business tool
- Delivers new content or functionality
- Saves staff time
- Saves money
- Generates increased income/profit
- Reduces business risk
- Reduces costs of providing offline content
- Limits wasted effort (such as the need to later redesign or redevelop)
- Addresses common/frequent user concerns
- Improves cooperation between teams
- Helps build relationships with other teams
- Helps the intranet team
- Addresses or removes an existing constraint
- Has lasting effect

Sample constraints

- Staff resources (eg 2 team members)
- Time (eg need to launch intranet on 1st of December)
- Budget ($)
- Limited time to develop new content
- Limited technology
- Low level of engagement from the business
- No executive sponsorship
- Low confidence in intranet team's ability to deliver
- Lack of overall intranet strategy
- Lack of intranet team experience or skills
- No content management system (CMS)
- Duplicated or competing business (or IT) systems
- Competing visibility of portal
- Lack of clarity around role of intranet
- Limited capability for development of applications
- Lack of content ownership
- Little scope for coordinating other people to provide content
- Limited time available to research and gather content
- Limited coordination with other teams
- No time to train staff on use of the intranet
- No time to enact cultural change
- Not all staff can access the intranet
- Limited IT support
- IT dictating solutions
- Legacy IT systems
- Current low level of intranet visibility
- Existing site is an 'anchor'
- Internal politics
- Business silos
- Organisational culture and processes
- Cynicism/scepticism of staff
- Slow sign-off/approval
- Low web literacy
- Continuing/continuous organisational changes

2.3 Identify constraints

More information!
See page 52 for detailed information, guidelines and tips.

Once the criteria have been captured, the intranet team needs to identify the *constraints* that are restricting the team's ability to deliver an improved intranet.

These should not be hard to list, as intranet teams are keenly aware of the limitations and organisational issues that are holding back their longer-term intranet plans.

The sample list on page 27 can be used to guide the discussions where required. As with the criteria, write the constraints identified during the brainstorm on to the electronic whiteboard.

Once the full list of constraints has been identified, select the top six constraints on the intranet (and the intranet team). This will help to focus discussions when evaluating individual ideas and activities. (Figure 7 provides an example of constraints identified during one session.)

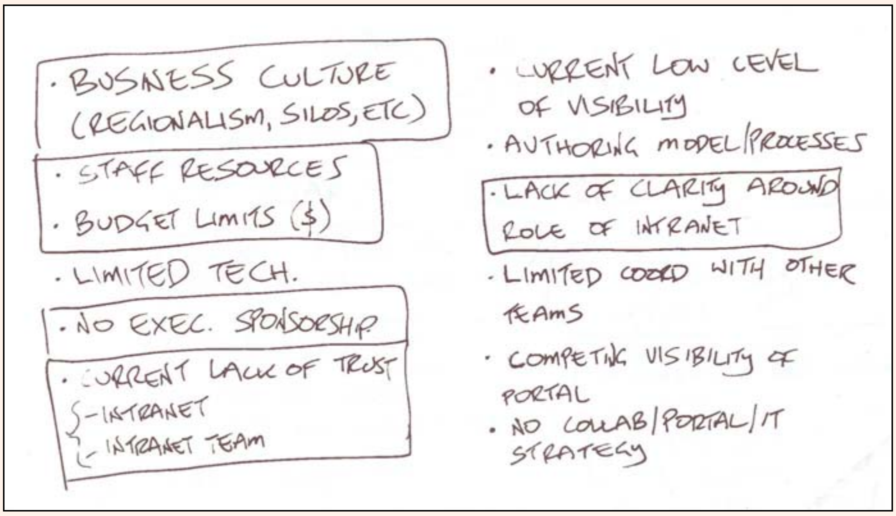


Figure 7: Constraints identified during a scoping process in a large private-sector organisation, captured on an electronic whiteboard.

2.4 List content and functionality ideas

More information!
See page 54 for detailed information, guidelines and tips.

A list of all possible intranet activities should now be gathered together. These can be drawn from a number of sources:

- requests already made to the intranet team
- activities already planned (or considered) by the intranet team
- issues and needs identified during the needs analysis (as discussed on page 21)
- ideas brainstormed by participants at the scoping session

Even if the pre-existing list of ideas is long, time should still be set aside for additional brainstorming. The goal should be to create the longest possible list, and ideas should not be evaluated or discussed while brainstorming.

2.5 Evaluate ideas based on criteria and constraints

The core of the 6x2 methodology is the evaluation of all the possible ideas against both the criteria and the constraints. This ensures that the activities that are chosen are not just doable, but are also worth doing.

Evaluate all the ideas in the context of what can be delivered in the *coming six months*. As a result, there may be many good ideas that are not achievable at this point due to constraints such as lack of resources or IT support (and therefore will have to be left for a later six-month period).

Working down the list of ideas, take one item at a time and evaluate it based on the important criteria and constraints. Ask the workshop participants the following two key questions:

- Does this idea match the key criteria?
- Is the idea achievable within the key constraints?

An idea doesn't have to match all of the criteria, but it must fulfil at least a few. Any ideas that don't match any of the criteria are automatically eliminated, without assessing the constraints. When assessing against the constraints, the idea or activity must be achievable in light of *all* of the constraints.

To ensure that the evaluation process works well, start slowly. For at least the first few items, discuss each of the criteria and constraints point by point. Do this in order, making sure that each has been discussed and agreed before moving on to the next one.

Once a number of items have been discussed, this will become quicker, and a looser approach can be taken to the evaluation of criteria and constraints.

Based on the results of the assessment against the criteria and constraints, place a tick, cross or question mark against each item as follows:

- *Tick:* the idea meets one or more of the important criteria and is achievable within the constraints.
- *Cross:* the idea does not meet any of the important criteria or cannot be achieved given the constraints.
- *Question mark:* it is not clear whether the idea is achievable and may need to be investigated further.

Against each idea, note down a rationale for the decision. This documents the reasons for including (or not including) an item, which is valuable for the team as well as helping when communicating the results to key stakeholders.

It is often easiest to type the results along with the rationale directly into a document as each of the items is discussed. Figure 8 shows an example of how this can be recorded.

More information!
See page 54 for detailed information, guidelines and tips.

Item	In scope?	Notes
Home page redesign	✔	Hard to do well, but high visibility and value. Will increase intranet usage.
Design guidelines	✘	Low visibility, no impact on intranet usage. No momentum, no success story.
World times	✘	Novelty value only, no business impact, doesn't build momentum.
Overall site redesign	✘	Meets criteria. Resource constraints, business culture, lack of executive sponsorship.

Figure 8: Sample showing how the results of the evaluation can be documented.

Each item is given a tick, cross or question mark. Notes are then captured regarding the reasons for the decision.

Noting down the reasons for decisions also means that the team can easily return to the list in the following six months, and quickly identify any ideas that might now be achievable based on the any changes to key criteria or constraints.

By the end of this process, the team will have a list of activities that will be conducted in the coming six months. These activities will be both achievable and of direct value to the organisation (and the intranet team).

2.6 Compile agreed list of activities and enhancements

Transfer the chosen items to a final list containing the specific activities and enhancements that are planned for the coming six months.

More information!
See page 57 for detailed information, guidelines and tips.

Congratulations! You now have a list of activities for the coming six months that is both doable, and worth doing. The next step is to review this list with key stakeholders. The list is then used as the basis for all the remaining steps in the 6x2 methodology.

Summary of the scoping process

The core of the 6x2 methodology is to carefully select which activities to conduct in the coming six months. This is done by first identifying the criteria and the constraints, and then rigorously evaluating all the ideas against these. This generates a list of activities that are not just achievable, but are also worth doing.

The scoping process works as follows:

- organise a scoping workshop
- identify the criteria
- identify constraints
- assemble a list of ideas and activities
- evaluate each item based on the criteria and constraints
- compile the agreed list of activities and enhancements

Step 3. Determine a new version number

More information!
See page 63 for detailed information, guidelines and tips.

As a supplement to the scoping process outlined in the previous section, determine a version number for what will be delivered. This serves two purposes:

- it provides a useful context for discussing how much should (and can) be delivered in the coming six months
- it communicates progress to the wider organisation in an effective way

Use the results of the scoping process to help guide the version number for the next intranet 'release'. For example, if the current version number is 3.0, the next version could be:

- *Version 3.01*, if minor 'bug fixes' are made to the site, as part of ongoing incremental improvements.
- *Version 3.1*, if some improvements are made to the intranet but the overall site is not significantly changed or enhanced.
- *Version 3.5*, if key issues are addressed, or significant functionality is added to the site.
- *Version 4.0*, if there is a major rework of the site, such as developing and implementing a new information architecture.

Use this version number to communicate the size of what is being done, and to set expectations for how much will be delivered. This should be used when reviewing the in-scope list of activities with key stakeholders, and when creating the executive briefing (both of which are discussed on coming pages).

> **Tip!**
> This is another optional step. If the use of version numbers would not be appropriate within your corporate culture, they can be omitted without impacting on the rest of the 6x2 methodology.

Step 4. Review the in-scope list

More information!
See page 64 for detailed information, guidelines and tips.

Once the intranet team has determined the list of activities that will be conducted over the next six months, the next step is to review this list with key stakeholders, including the overall intranet sponsor or owner. The review should be held immediately after the session to:

- explain the approach taken
- provide an opportunity for further strategic input
- allow the scope to be revised as required
- allow the list to be finalised

By the end of this review, the intranet team should have a near-final list of activities for the coming six months.

Step 5. Create a detailed project plan

Now that there is a bullet-point list of activities for the coming six months, this needs to be fleshed out into a detailed project plan.

This project planning should focus on determining that the identified activities are actually achievable within the six months. It should also identify any additional resources required in enough detail to present a compelling case to the intranet sponsor or other manager.

In practice, the detailed project plan should cover:

- specific activities
- actual resources required
- project plan, including sequence and timing
- other implementation details

There are many ways of documenting project plans, and the intranet team should use the one that they are most comfortable with. The specific approach taken doesn't matter, as long as it is sufficiently practical and rigorous.

The detailed project planning will undoubtedly find that some changes to the list need to be made. This may include:

- removing some items, due to issues identified during the detailed project planning
- modifying the scope of some items (either broadening or narrowing the focus of the activities)
- adding new items, where new approaches or ideas arise

The detailed project planning phase also provides an opportunity to define the specific deliverables related to the chosen items. For example, an item may have been documented as 'improve several key intranet sections' during the scoping session, which needs to be defined more concretely.

By the end of the detailed project planning, the intranet should have a clear plan for the coming six months, and the confidence that it can be realistically achieved. Specific responsibilities, dependencies and risks will also have been identified.

The final project plan should be communicated to the intranet owner or sponsor, providing them with an opportunity to give feedback or to provide input. The project plan should then be signed off, and communicated to all relevant stakeholders.

More information!

See page 67 for detailed information, guidelines and tips.

Step 6. Sketch out the following six months

Once the first six months have been fully planned, explore the possible activities that might be conducted in the following six months.

From this, identify a list of activities that may be initiated once the current six months has been completed. With this in hand, the intranet team will have an overall project plan that covers the coming twelve months, six months in detail, six months at a high level.

This is the basis for the naming of the 6x2 methodology, and it gives a clear roadmap (or 'strategy') for the coming year.

Identify the activities in the second six months by returning to the criteria and constraints identified in the first step, asking the questions:

- Should the criteria be adjusted, to reflect any change in priorities or focus?
- Can the constraints be relaxed, on the basis of successfully completing the first six months?

This should allow a revised list of criteria and constraints to be developed, based on the outcomes of the currently planned activities. While these are likely to be similar to the current set, it should be possible to make at least a few adjustments based on the increased effectiveness of the intranet team and the momentum that has been gained.

With the revised criteria and constraints, revisit the list of possible activities. Quickly review the activities that were out of scope for the first six months to determine whether they might be included in the following six months.

The outcome of this activity is a bullet-point list of activities for the following six months, which can then be incorporated into the executive briefing and communicated to the wider organisation.

More information!
See page 69 for detailed information, guidelines and tips.

Step 7. Create an executive briefing

Having completed the core steps of the methodology, the intranet team has now documented:

- criteria and constraints
- list of activities for the first six months
- detailed project plan for the first six months
- indicative list of activities for the following six months

With this information in hand, it becomes quite straightforward to create an executive briefing that clearly outlines the approach that will be taken to improve the intranet.

This executive briefing is vital to building executive support for the intranet, and it is specifically designed to increase momentum for ongoing intranet improvements.

More information!
See page 70 for detailed information, guidelines and tips.

The briefing should be created in a format that matches the standard practices and culture of the organisation. This may mean producing a document, or a presentation.

See page 70 for detailed discussion of how to create the executive briefing.

Step 8. Create an 'intranet concept'

More information!
See page 73 for detailed information, guidelines and tips.

As well as the executive briefing, the team needs to creation a communication to wider organisation, outlining the scope and direction of the intranet activities.

This communications message should be written as an 'intranet concept', which is a one-page narrative document which outlines:

- current situation
- overall strategy/approach
- specific activities to be delivered
- future directions

This single-page intranet concept presents a complete picture of where the intranet is, where it is going, and what this will mean in practice. Written in the right way, this is a compelling story that can be used in many different ways.

See page 73 for detailed information on how to create an intranet concept, including full examples.

Step 9. Implement the six-month plan

More information!
See page 81 for detailed information, guidelines and tips.

With the planning complete, the next step is to initiate the project. While there will be challenges to overcome, this is the phase that the intranet team is most likely to be comfortable with. Psychologically, teams are always at their happiest when they are getting stuck into doing the 'actual work'.

If the detailed project planning has been done correctly, implementation should be relatively straightforward, with resources allocated and staff members assigned.

This all assumes, however, that the organisational environment will not change over the six months, and that additional issues or challenges will not arise.

The reality is that there will need to be careful project planning and monitoring throughout the six months to ensure that the desired functionality and content is delivered successfully.

See page 81 for suggestions and tips on project managing the implementation.

Step 10. Review the project outcomes

Once the six months of activities have been completed, the intranet team should conduct a quick review. This is designed to build the ongoing effectiveness of the intranet team and to provide an input into the next round of the 6x2 methodology.

This 'lessons learned' activity should identify:

- what went well
- what could be improved
- where estimates were (and weren't) met
- specific lessons or insights that can be taken into the next six months

This can be a formal or an informal process, but in either case should be rigorous enough to identify key lessons that will help the intranet team in the future.

See page 85 for more information on how to conduct the 'lessons learned' activity.

More information!

See page 85 for detailed information, guidelines and tips.

Continuing the process

Once the first six months has been successfully completed, the process then starts again from the beginning. This includes conducting a full scoping exercise that creates a new set of criteria and constraints, evaluating the list of possible activities, all the way through to implementing the next six months.

In this way, intranet teams are provided with an ongoing approach to managing and growing their intranets.

More information!

See page 87 for detailed information, guidelines and tips.

PART C

The 6x2 methodology in detail

This section provides supporting information for Part B, giving tips and suggestions on how to approach specific aspects of the 6x2 methodology.

(Read this section in conjunction with the overall summary of the 6x2 methodology contained in Part B.)

Step 0. Preliminary needs analysis

Before starting the 6x2 methodology, intranet teams should conduct initial *needs analysis* activities, to understand what information and tools staff will require. This will also identify the specific factors, features and tools that will drive staff interest and usage of the intranet.

Input will also be required from key stakeholders and project sponsors, in order to understand the *business drivers* for the intranet. These complement staff needs, and ensure that the intranet is aligned with broader organisational strategies and initiatives.

In practice, a structured approach should be taken to the needs analysis, allowing a considerable amount of information to be gained on actual needs in a very short period of time.

This 'step 0' allows the intranet team to meaningfully conduct the rest of the steps in the 6x2 methodology, confident that the broadest possible range of input has been used to shape the direction of the intranet.

Don't ask staff what they need

A common trap to fall into is to just ask staff what they need. This involves asking questions such as:

- What is most useful on the intranet?
- What are the problems with the current intranet?
- What features are missing from the intranet?
- What additional information do you need?
- How else could the intranet help you with your job?

The key problem with these questions is that they require staff to have an understanding of intranets, and how they can support day-to-day work in an organisation.

In general, however, staff have little understanding of intranet technologies or approaches. Their in-depth knowledge relates to their job role and activities.

Asking these questions generates one of two possible responses:

- "I'm not sure. Can you give me some examples of how an intranet *could* help me?"
- "I think it would be great if the intranet provided feature *xyz*!"

In the first case, staff are unable to provide meaningful input into intranet design or strategy. In the second, a 'wish list' of features and tools is collected, but without information about whether these ideas will actually be useful (or used) in practice.

In either case, attempting to gather intranet ideas from staff in this way will not generate a clear and concrete roadmap for how to improve the intranet.

Avoid gathering a wish list

Capturing a 'wish list' of intranet ideas is very dangerous for intranet teams. What is rarely recognised is that once a 'wish list' exists, intranet teams are now implicitly required to select their activities from the list, or at the very least, implement at least a few of the ideas.

What if none of the ideas is likely to be effective or successful? The intranet team is then left with the difficult task of managing stakeholder expectations, losing the trust of staff who were consulted, or being forced to deliver functionality that they know is unlikely to be used.

Even if some items are eventually implemented, it will always be the case that some of the stakeholders will be disappointed that 'their' functionality was not included. This then erodes the benefits gained from the capabilities that are delivered.

Intranet teams should therefore always avoid asking staff 'what they want'.

Structured techniques

A better approach is to use a range of structured 'needs analysis' techniques. These are designed not to gather intranet ideas, but to build a comprehensive understanding of the *needs* and *issues* within the organisation.

These techniques focus on what staff do in their jobs, what activities they are involved in, the information they require, and where this is obtained. Using these techniques helps to build a picture of the day-to-day operation of the organisation, and the environment in which staff work.

Once staff (and organisational) needs are understood, it is a relatively straightforward process to identify potential solutions (these will often be very obvious once the problem is fully understood).

In this approach, staff provide information on how they work, and the intranet team provides the expertise in intranet design, management and strategy. Combined together, many practical activities and improvements will be identified that will build the value and usage of the intranet throughout the organisation.

This information is used as a key input into the 6x2 planning process (as discussed on page 49).

Summary of needs analysis techniques

There are a wide range of needs analysis techniques that can be used, including:

- staff and stakeholder interviews
- workplace observation
- contextual inquiry
- surveys
- focus groups

Each of these techniques is discussed in the following sections.

Staff and stakeholder interviews

One-on-one interviews are a very effective way of gathering information on staff needs and issues. In general, the interviews should focus on operational staff, to build up a picture of key information needs.

Stakeholder interviews can also be conducted, with intranet authors, senior managers and executives. These can complement the staff interviews, and provide top-down strategic input into the process.

As outlined earlier, the interviews should not focus on the intranet itself, and it's not necessary to cover the intranet at all during the interviews.

Instead, the interviews should explore how staff work, what this involves day-to-day, what decisions they make, what information they need and where they currently get this from.

The interviews are designed to build up a picture of staff activities and working environments, which can then be used to determine how the intranet can provide greater assistance and support.

The interviews should be run as 'semi-directed' sessions, with open-ended questions giving the opportunity to explore any issues or topics that arise. This allows the interviews to range widely over any issues of relevance to staff, ensuring that a complete picture is built up. Rigid interview formats should be avoided, as these will miss opportunities to identify unexpected issues or needs.

(See page 22 for a list of sample questions to use during one-on-one interviews.)

Workplace observation

This involves going 'out into the field' to observe the activities of staff, and the environments in which they work. Workplace observation is particularly effective in environments such as call centres, manufacturing areas, field working, or on the road with staff who travel or work off-site.

This technique is less appropriate in environments where activities cannot be easily seen or heard. For example, policy officers working in head office would spend the majority of their time in Word, on email or using the phone. Observing this would provide few opportunities to gain a deeper understanding of activities, issues and needs.

Workplace observation is a very holistic technique that will identify patterns of work and environment issues that are impossible to gather using techniques such as surveys or focus groups

For example, Figure 9 shows one of the primary information sources for staff in a call centre. Understanding this is critical when planning intranet activities, to ensure that delivered content and functionality will be used.

Figure 9: Workplace observation conducted in a cell centre often identifies the use of 'quick references' resources such as this.

These information sources may replace the need for some intranet-based content or functionality.

Workplace observation will also identify the resources that staff use to support their work. For example, call centre staff may have folders of photocopied information that they rely on, more than the intranet.

Similarly, workplace observation may identify that mobile sales people spend little time in the office, and therefore have limited access to the intranet.

In general, workplace observation is a good way to provide a broader context for more detailed research, such as one-on-one interviews or contextual inquiry.

It will also help to identify situations in which the intranet is not the most effective or appropriate solution. In some cases, for example, staff should continue to use their paper resources instead of having these converted to intranet pages.

Understanding where the intranet is not the best solution allows the team to focus on other aspects, thus avoiding the situation where delivered content or functionality is not used (or cannot be used).

Contextual inquiry

This is a combination of staff interviews and workplace observation that involves exploring issues with a staff member in their normal working environment. By conducting the interview 'in context', it becomes possible to see the resources used by staff when conducting work activities.

The interviewer can also ask the staff member to show them how they complete specific activities, for example, showing how they find a piece of information on the intranet.

The key principle underpinning contextual inquiry is that the staff member acts as the 'teacher', while the researcher is the 'student'. The researcher then learns how to do the work of the staff person, including what information to use, and where to obtain it.

This technique is very effective at identifying issues with currently available information sources and tools. Due to its focus on systems and information sources, however, it often provides less insight into broader cultural and business-process issues.

Surveys

Surveys are a commonly used tool to gather the input of staff throughout an organisation. While they can be quickly and widely distributed, they are often not an effective way of gathering meaningful results.

Surveys are best suited to assessing the opinions of staff, rather than needs. As such, surveys work well to assess satisfaction with the current intranet, but do not generate concrete ideas on how to improve the site.

Care must be taken when constructing survey questions. As much as possible, the questions should be specific, focusing on the recent experiences of the survey respondent, rather than on collecting broader opinions or perceptions about the site.

It is also important to communicate the results of the survey back to participants (and the organisation as a whole), and to be seen to act on the findings. Without this step, the apparent lack of impact of the survey can generate further dissatisfaction with the intranet team and the site itself.

Surveys should never be used as the sole mechanism to gather staff input, and should always be complemented with other techniques. Surveys can be most useful in demonstrating problems with the current site, if more support for an intranet redesign is required.

Focus groups

These are facilitated discussions that focus on exploring a topic within a group setting. Often used as a way of gathering input from larger numbers of stakeholders, focus groups must be run carefully if they are to generate meaningful results.

In particular, the group dynamics needs to be closely managed, to ensure that a small number of individuals do not dominate the sessions.

Wherever possible, staff at the same level should be involved in the focus groups. Having a more senior staff member involved can discourage open discussions and reduce the amount of useful debate.

Focus groups are best used to explore current issues and problems, rather than to discuss 'wish lists' of potential intranet ideas. They should always be used in conjunction with techniques such as staff interviews and contextual inquiry, to ensure that the results are meaningful.

Planning the needs analysis

There are a number of key principles to consider when planning the use of needs analysis techniques.

Focus on operational staff

On the whole, the research should focus on the operational staff within the organisation. That is, the staff who do the actual work, rather than managers or corporate services staff.

The key principle is to avoid having people discuss the current situation *on behalf* of other staff (such as managers outlining the needs and issues of their staff). To get a clear and realistic picture of needs, the staff themselves should be involved through interviews or observation.

Use a mix of techniques

A broad range of needs analysis techniques should be used during the research. As outlined earlier, each technique has strengths and weaknesses, and is better suited to certain situations.

For example, some techniques will be suitable for head-office staff, while others will be much more effective in the field. Using a mix of techniques will ensure that the results are meaningful and comprehensive, as well as reducing the possibility of missing key issues.

Overlap techniques

For any one group of staff, multiple needs analysis techniques should be used. Relying on just a single technique introduces the possibility of either missing results, or biasing the results due to the way the technique works.

For example, staff interviews could be supported by workplace observation or a focus group. This would gather quite different information for the one group, broadening the scope (and confidence) of the findings.

Each staff member should not be involved more than once, as this would be intrusive. Instead, using multiple techniques gives the opportunity to involve a larger number of staff within a given area of the organisation.

Involve a wide range of staff

A broad cross-section of staff should be involved during the needs analysis. These staff should be selected according to their job roles, rather than according to their location in the organisational chart.

For example, it is more important to interview both admin staff and nurses, than to talk to one admin from each of the major business units.

Staff should also be drawn from multiple offices and locations (where these exist). This will help to identify any geographic differences in needs or issues.

For example, regional offices often have quite different needs, compounded by slower network connections and limited corporate visibility. Crucially, however, these regional offices are often responsible for much of the operational and service-delivery aspects of the organisation, making them an important audience for the intranet.

Selecting staff

The question of how many (and which) staff to involve requires some careful consideration. As outlined above, a wide range of staff should be involved.

In practice, there are two main ways of selecting staff:

- Horizontal cross-section

  This involves staff from across the organisation, in as many different roles, business units and geographic locations as possible.

  This gives a strong sense of overall needs and issues, as well as the culture of the organisation. This type of needs analysis is very useful when determining intranet goals, or developing an overall intranet strategy.

- Vertical slice

  More in-depth needs analysis can be conducted within a single business unit, or a group of staff with the same role. Staff at all levels within these groups would then be involved to create a complete picture of operational issues and needs.

  This type of research looks in detail at the day-to-day tasks, and the specific information sources used. As a result, this provides concrete information on how to better support the specific group being researched.

In many cases, a horizontal cross-section is used to create the broad intranet strategy, and then followed up by more specific investigation that targets specific groups of users or individual business units.

> **Tip!**
>
> It is also worth involving a mix of experienced staff and new starters in the needs analysis. These two groups will have very different needs, and often the new starters can give the greatest insight into how well the intranet is meeting day-to-day needs.
>
> (New starters are often a key audience for the intranet, as they have the least knowledge about working practices and key company details.)

Amount of research required

The general principle is that the needs analysis should continue until nothing sufficiently new is being identified. In practice, this point is reached a lot quicker than you may expect. In many cases, 3–5 days of needs analysis is enough to gather a substantial volume of information.

The key principle to remember is that the needs analysis is not intended to find every issue and requirement. Rather, it is designed to identify the largest and most important issues and needs.

In practice, the goal is to identify possible activities and improvements for the next six (or possibly 12 months). This means that even in an organisations of 10,000 staff, it may only be necessary to involve a small number of staff to identify the big issues and needs.

Once the first round of improvements has been made, additional needs analysis can be conducted. This is often targeted research (a vertical slice) that looks at the needs of specific groups, once broader issues with the intranet have been resolved.

Tip!

If resources are limited, intranet teams can use external consultants to assist with the needs analysis. In many organisations, training teams are often also well positioned to help with this work, as they already have experience with this type of research.

Protecting confidentiality

It is vital to protect the confidentiality of the research participants, as issues will be raised that could get staff into trouble. The results of the research should be anonymised before being used in reports or recommendations.

The raw notes or audio tapes (if used) should not be provided to anyone outside the direct research team, and should generally be destroyed at the conclusion of the needs analysis.

Using personas

One way to capture and communicate the results of the research is through the use of *personas*.

Personas are archetypal users of an intranet (or website) that represent the needs of larger groups of users, in terms of their goals and personal characteristics. They act as 'stand-ins' for real users and help guide decisions about functionality and design.

Personas identify the user motivations, expectations and goals responsible for driving online behaviour, and bring users to life by giving them names, personalities and even a photo.

They can then be used throughout an intranet project, especially when evaluating what functionality to deliver on the site (as discussed on page 49).

Introducing personas into the planning process can bring a number of benefits:

- users' goals and needs become a common point of focus for the team
- the team can concentrate on designing for a manageable set of personas knowing that they represent the needs of many users

- they help avoid the trap of building what users ask for rather than what they will actually use
- activities can be prioritised based on the personas
- disagreements over decisions can be sorted out by referring back to the personas
- designs and improvements can be constantly evaluated against the personas

For more information on personas, see the article:
www.steptwo.com.au/papers/kmc_personas

Strategic input

In addition to building an understanding of staff needs and issues, the initial needs analysis must involve senior management to understand overall strategic goals and priorities.

While senior management may not have a clearly defined vision for the intranet itself, they will have a strong understanding of organisational issues and directions.

Time should therefore be spent discussing these strategic issues with senior management. This should not just be with the direct intranet sponsor, but also with other senior managers, ideally up to the CEO level (or equivalent)

These discussions will help to identify the overall *business drivers* for the intranet, such as:

- reduce business costs
- help to drive sales
- support the creation of a single corporate culture
- improve staff productivity
- support collaboration and knowledge sharing
- increase customer (and staff) satisfaction

These overarching strategic goals should influence the selection of criteria during the scoping process (page 51).

> **Tip!**
>
> Also read through key strategic documents, such as annual reports and 5-year strategies. Beyond providing additional insight into organisational priorities, these documents also offer a valuable source of language and terminology that can be 'stolen' for use in intranet planning and communication.
>
> Reusing this language helps to build support at senior management, and makes explicit the alignment between the intranet and strategic goals.

Making use of the results

The primary purpose of this initial needs analysis is to identify possible activities to be evaluated as part of the 6x2 planning process. This ensures that a broad range of potential activities is captured, drawn from the day-to-day needs of staff.

The needs analysis activities also provide invaluable context for the planning process, helping to guide the selection of criteria (page 51) and constraints (page 52), as well as assisting intranet teams to evaluate the practicality and value of the ideas.

The strategic input gained will also strongly influence the types of activities conducted, and it is vital to guide the intranet activities from the outset to ensure they are strongly aligned with organisational goals and priorities.

Tip!

Needs analysis activities should generate a wealth of ideas and options for the intranet team. This list is almost always much broader than might otherwise have been identified in isolation, and will contain at least a few surprising ideas not previously considered.

Even four to five days of needs analysis should generate enough ideas to keep the intranet team busy for at least six to 12 months.

Step 1. Give the intranet a version number

One of the key principles behind this approach to intranet planning is to focus on delivering new functionality and content. One very practical way of ensuring that the intranet is steadily moving forward in its capabilities is to give the site a *version number*.

Reflecting the practices of the software world, version numbers are a good way of assessing where the intranet currently stands, and how big an improvement can realistically be made.

To start the ball rolling, an arbitrary number should be assigned to the current intranet. For example:

- *Version 1.0*, if the intranet has been recently launched
- *Version 2.0* or *3.0*, if the intranet is well-established
- *Version 4.0* (or higher), if the intranet is mature and now moving towards the next stage of its evolution

The actual version number chosen is not important, but it should resonate with the intranet team and the wider organisation. It will be used as the basis for communications about the planned improvements (for more on this see page 73).

The use of version numbers should reflect the organisational culture. In practice, they should only be used if they can effectively communicate the state of the intranet to the wider organisation.

The use of version numbers may be less relevant (and less practical) for intranets in very large or multinational companies. In this situation, there are many parallel activities being conducted that contribute to the development of the intranet, and it may be difficult to define a single version number that encompasses all of these changes.

Tip!

If version numbers aren't likely to be meaningful to the executive (and staff), then they can easily be omitted without impacting on the rest of the 6x2 methodology.

More information

The version numbering of intranets is the brainchild of Martin White of Intranet Focus (www.intranetfocus.com). Martin is one of the recognised experts in intranet management, and from his home-base in the UK has seen European organisations struggle with the same issues as their counterparts in other areas of the world.

Step 2. Scope the first six months

The core of the 6x2 methodology is determining what functionality or content will be delivered in the coming six months. Through the use of a simple *scoping process*, the selected activities will deliver tangible and visible wins for the intranet, while better positioning the intranet team to tackle even larger projects in the following six months.

The overall approach to the scoping process is outlined in Part B, starting on page 24. This section provides supporting guidelines and suggestions on how to address specific issues arising from the scoping activity.

Overview of the scoping process

The core of the scoping process is comprised of four key elements:

- *criteria* for what to include in the first six months
- *constraints* that will limit intranet activities
- *possible activities* to include
- *final list* of in-scope (and out-of-scope) activities

By the end of this initial phase, there will be a clear list of activities to be conducted in the first six months, based on a pragmatic set of criteria and constraints that ensures that the activities are both achievable and worth doing.

These deliverables define what will be delivered by the intranet, as well as forming the basis for all the remaining steps.

The steps involved in scoping the coming six months of intranet activities are:

2.1 organise a scoping workshop
2.2 identify the criteria
2.3 identify constraints
2.4 list content and functionality ideas
2.5 evaluate ideas based on criteria and constraints
2.6 compile agreed list of activities and enhancements

Each of these steps is discussed in the sections that follow.

2.1 Organise a scoping workshop

The scoping activity should be run in the format of a group workshop, involving the team members and key stakeholders. This allows ideas to be brainstormed, and a consensus to be quickly gained.

Book a suitable room

A room will need to be booked for the duration of the scoping workshop. Ideally, the same room should be used throughout the session, as moving between rooms is disruptive to the process and wastes time.

The room should be large enough to be comfortable, ideally with natural light. Most importantly, an electronic whiteboard should be available to record the results of the scoping process.

> **Tip!**
>
> If an electronic whiteboard isn't available, a flipchart can be used instead. If necessary, the team can write instead onto large-ish sheets of paper spread out across the conference table.

Invite the right participants

The number of workshop attendees should be kept to a minimum. Only involve the key decision makers, as greater numbers will make it harder to gain consensus within the available time.

In practice, the workshop participants should be those staff responsible for driving (and ultimately managing) the intranet, with perhaps a few other key stakeholders.

At its smallest, the scoping workshop can involve just the intranet team. If it is desirable to include a larger number of participants, try to limit the workshop to no more than five or six staff in total, as larger numbers become unmanageable.

Where appropriate, it may also be valuable to involve a separate facilitator to run the meeting, to allow the intranet manager to focus on the details of the activities. (This is discussed further on page 18.)

Complete the scoping in a single session

All of the scoping activities outlined in this section should be completed in a single meeting. This ensures that momentum is sustained, and that overall context and reasons for decisions are not forgotten or confused.

There is a very real danger that if the steps (identifying criteria, constraints and evaluating activities) are broken across several meetings the overall initiative will 'peter out' before it really gets started.

Ideally, therefore, the team should be 'locked into a room' until the scoping exercise has been completed, and a draft list of proposed activities is finalised.

2.2 Identify criteria

The basis of the scoping process is to determine the *criteria* for what to deliver in the coming six months. This determines the priorities, and focuses attention on those activities that will have a significant impact on the organisation (or on the intranet team).

Criteria vs intranet goals

The word 'criteria' is used very carefully in the scoping process, and it is important to distinguish between criteria and intranet *goals*.

Intranet goals are often high-level statements of overall direction or general principles. For example, common goals include 'providing staff with the information they need to do their jobs', or 'support knowledge sharing and collaboration'.

Criteria are more pragmatic, and they focus on answering the fundamental question: why would we want to do this particular activity? There are two underlying reasons for choosing an activity: it helps the intranet (and therefore staff), or it helps the intranet team.

When brainstorming the criteria, use the following two questions to guide discussions:

- *Why would we choose something for inclusion in the next six months?*
- *What would make us choose one item instead of another?*

These will help to ensure that the criteria don't become too high-level.

Create specific criteria

Wherever possible, the criteria are fairly specific. Ideally, it should be possible to unambiguously say 'yes' or 'no' when evaluating the potential activities against the criteria. While value judgements will have to be made, the more concrete the criteria are the easier the scoping process will be.

In practice, some criteria will be generally applicable, such as 'must be useful', whilst other criteria will be specific to the organisation in question, such as 'content must support product *xyz*' or 'must assist field sales staff'.

Balance inwards- and outwards-focused criteria

The final list of criteria should include a balance between 'outwards-focused' criteria that focus on benefits to the organisation (and the intranet), and 'inwards-focused' criteria that help to build support for the intranet team itself.

For example, outwards-focused criteria include:

- saves staff time
- increases intranet usage
- delivers tangible and visible benefits

Whereas inwards-focused criteria include:

- builds momentum for the intranet (and intranet team)
- helps build relationships with other teams
- builds trust (and confidence) in intranet team

At the end of the day, the chosen activities must help the intranet team to build its resources, as much as delivering direct value to the organisation. This recognises that without an effective intranet team, a successful intranet cannot be sustained.

The criteria must therefore be selected to ensure that the intranet team does not forget its own role in the delivery of solutions. At least a few criteria must be chosen to directly support the intranet team itself.

2.3 Identify constraints

Once the criteria have been captured, the intranet team needs to identify the constraints that restrict the team's ability to deliver an improved intranet.

Constraints are … constraints

Constraints are the primary factors that determine what can be done on the intranet, and it must be recognised that they are exactly that: constraints.

Intranet teams often talk in terms of 'if we could just … then we would be able to deliver that piece of functionality'. While it is possible to eliminate constraints in the longer term, they are essentially immovable over a six-month period.

Intranet teams need to start planning *within their constraints*, rather than trying to remove them (or just waiting for them to go away).

Include all constraints

Some of the constraints are fairly obvious, such as resource and time constraints. Beyond this, however, there is a much wider range of constraints that should be identified and documented, including:

- key organisational issues (such as the lack of an overall strategy)
- cultural issues (such as resistance to change)
- broader information management issues
- issues relating to the intranet team itself (such as a lack of recognition or trust)

The most comprehensive possible set of constraints must be captured as part of the scoping process, to ensure that the activities that are finally selected can actually be implemented in the current circumstances.

Make constraints as specific as possible

Constraints should be as specific as possible. For example, instead of 'limited IT support', it would be better to list 'only 10 days of IT support available'. The more concrete the constraints are, the easier it will be to evaluate whether an activity can be meaningfully completed within the six-month timeframe.

Note that it won't always be possible to quantify specific constraints. For example organisational and cultural issues will always be quite high-level).

Be honest!

It is crucially important that the intranet team is completely honest when documenting the constraints. There is no point in capturing the requirements if sensitivity to internal politics prevents the most significant constraints from being included.

It is also important not to forget the cultural and historical issues that will impact on the intranet, such as a lack of confidence, or a previous track record of failed projects.

If necessary, the intranet team can be selective about the criteria that it conveys to the executive (and other stakeholders), but a complete list must be captured at this point for use in the 6x2 planning process.

2.4 List content and functionality ideas

In preparation for the actual scoping process, a list of possible activities, content and functionality needs to be gathered together. This list should be as long as possible, and drawn from many sources.

- requests already made to the intranet team
- activities already planned by the intranet team
- issues and needs identified during the needs analysis (as explored on page 37)
- ideas brainstormed by participants at the scoping session

Brainstorming ideas

One good way of brainstorming ideas is to give each participant a pad of Post-it Notes® and ask them to write each idea on a separate note. These can be stuck up on a wall to bring all the ideas into a single set.

If useful, similar items can be grouped together as part of this process. This can help when evaluating the ideas, as similar ideas can be combined together. (This technique is known as 'affinity diagramming'.)

Create a long list

You may find that the workshop participants have lots of ideas and the list starts to become fairly long. While it may be tempting to cut short the brainstorming process, it is better to keep going until all the ideas have been captured. This the participants in the session feeling that their options are being ignored.

Even if many of these ideas are not eventually selected for the coming six months, the list of potential improvements will be very valuable for later phases.

2.5 Evaluate ideas based on criteria and constraints

The most important part of the 6x2 methodology is the evaluation of all the possible ideas against both the criteria and the constraints. This ensures that the activities that are chosen are not just doable, but are also worth doing.

When conducting the evaluation of potential activities, consider the following guidelines and tips.

Ruthlessly assess the ideas

It is vital that each idea is assessed ruthlessly against the criteria and the constraints. Without a brutally honest assessment against the key criteria and constraints, the value of the 6x2 methodology is lost.

It is easy for the intranet team to get caught up in unstated assumptions about how the intranet should be improved, or to be swayed by unconscious desires or emotions.

This leads intranet teams to say: "but we must redesign the whole intranet, otherwise we're not doing anything worthwhile at all!". If the constraints mean, however, that this is not achievable, it has to be knocked out regardless of how desirable it may appear to be.

Evaluate against current resources

The evaluation must be done against the resources that are currently available. For example, if 40% of the team's time (and resources) are allocated to ongoing maintenance of the intranet, the activities must be achievable within the remaining 60%.

While the detailed project planning (discussed on page 62) may identify additional resources outside the team that might be used (such as contractors), this should not be a key consideration at this point.

To make the evaluation process as useful as possible, the group should focus on what can be done as things currently stand. Even if there will be a short-term loss of resources (such as a team member going on holiday), this must be factored into the planning.

The goal, after all, is to identify what can be done in the next six months, within the existing constraints, rather than what could (or should) be done.

So throughout the evaluation process, always come back to the timeframe of the next six months, and ensure that pragmatic decisions are made within this overall constraint.

Items must be completed in six months

Initially, every activity included in the project plan must deliver by the end of the first six months (or earlier). This is critical to demonstrating the value of the activity, as well as clearly showing that the intranet team can 'walk the walk' and not just 'talk the talk'.

For the initial six months, if the activity can't be completed in six months, it is automatically ruled out. This is the case even when the activity will deliver large long-term benefits, or address a core infrastructure issue.

Sustaining this discipline will be challenging, as there is always the pressure to address the 'big issues', or at least start them, even if they can't be finished in six months. While there can be no flexibility in sticking to the six-month rule for the initial activities, there are further options in later six-month periods (as discussed on page 89).

Take parts of ideas

It may sometimes be possible to take *part* of an idea, if the whole idea cannot be done within constraints. For example, instead of redesigning the whole intranet, the revised activity might be to update one key section.

This is one way in which the initial list of ideas can be cut down to a set of activities that can be achieved in the coming six months. Note that the individual activities will be further refined during the detailed project planning (see page 67).

'Chunking' items

Another approach to the requirement to deliver the functionality or content within the six-month period is to break longer or bigger activities into smaller 'chunks'.

While this may allow the smaller activities to be delivered within the six-month timeframe, care must be taken to ensure that the items still match the criteria. Even the smaller pieces of work must help to build momentum for the intranet in the short term, and not just support longer-term objectives.

Tackling activities longer than six months

Some activities will unavoidably take longer than six months, even if the intranet team has much greater resources. For example, selecting and implementing a new content management system may require:

- three to six months to select the appropriate CMS
- two months to implement the CMS
- six to 12 months to migrate all the content

Other longer-term activities may relate to developing an information management strategy, creating a complete set of intranet policies, improving the technical architecture, or implementing a new authoring model. While these longer activities cannot be included in the initial six-month period (as discussed above), they must be addressed at some point.

Wherever possible they should be delayed until the upwards spiral of the 6x2 methodology provides the intranet team with sufficient resources to complete the activities within a six-month period.

Where this is not possible, the following rule should be followed: *longer activities can be included in scope, as long as sufficient new functionality is still delivered at the end of six months*. In other words, the longer-term activities must not impact on the resources of the intranet team to the extent that the six-month deliverables are insufficient to support the upwards spiral.

The key to this is taking an uncompromising approach to determining the real resource requirements for these longer-term activities, and therefore recognising the likely impact they will have on the six-month deliverables.

Taking two passes

The approach outlined on page 29 involves assessing each idea in turn against the criteria and constraints. If time is limited, this may inherently favour the items at the beginning of the list, potentially knocking out later items by default.

An alternative approach is to start by assessing each item on the list against the *constraints*, to narrow down the list to a smaller set of achievable items. These items are then evaluated against the *criteria*, to come up with the final list.

Choose this 'two pass' evaluation approach if time is limited, or if the group dynamics are likely to mean that the later items get less consideration when using the standard approach.

2.6 Compile agreed list of activities and enhancements

A final list is then created containing the items chosen for the coming six months, based on the scoping activity.

Sanity check the list

'Sanity check' the list, to ensure that as a whole it can be implemented within resource constraints. In particular, care must be taken to avoid the situation where each individual item is small enough to be done, but when added up, the list as a whole is too large to be achievable.

For this reason, the final list should be evaluated against the constraints to ensure that it can be delivered within the six-month timeframe. If necessary, revise the list to create a more achievable scope.

The list also needs to be assessed against the criteria, to ensure that a sufficiently compelling set of changes will be delivered. This is crucial for building momentum for the intranet, and ensuring that each six-month period generates additional interest and support.

Other notes on the scoping process

Beyond the guidelines provided in the previous sections, consider the following tips and suggestions.

Maintenance work

The focus of the 6x2 methodology is on *enhancements* made to the intranet. Regular maintenance and management of the existing site is equally important in delivering a successful intranet.

In general, any day-to-day management of the existing intranet should not be included in the scoping activity. Instead, the scoping should focus solely on new functionality and content.

The ongoing maintenance of the intranet should be managed separately, using existing processes (although this will be covered by a future resource published by Step Two Designs).

While this ongoing work is not part of the 6x2 methodology, it must be factored in when determining the amount of time and resources available for new activities.

In addition, it is often necessary to look for ways to reduce the amount of time devoted to general maintenance, in order to free up the team to tackle new work.

Infrastructure projects

In many organisations, particularly larger businesses, the intranet may be involved in (or affected by) large infrastructure projects. Typically run by IT, these projects may include:

- deploying a new document management system
- enterprise content management
- enterprise search
- enterprise resource planning (such as SAP, etc)

These projects may deliver key functionality or supporting capabilities that will help the intranet to meet its goals. In practice, many of these projects may take 9–24 months, with initial planning and product selection taking at least a year.

These large-scale and long-term projects clearly do not fit within a six-month delivery cycle, but they don't have to. As these projects are typically run by IT, the answer is to let them operate in parallel to the planning (and delivery) of the 6x2 methodology.

In other words, leave IT to run these projects, but do not include them in the 6x2 planning process. Even though these projects may eventually deliver key functionality, the intranet team must still focus on delivering sufficient new content or capabilities within the six-month timeframe.

Of course, it is critical that the intranet team have direct input into the planning of these projects, wherever possible. The intranet team should also be involved throughout the project, to ensure there is a good fit between the infrastructure projects and the planned direction for the intranet.

In practice, however, this engagement may prove to be difficult, and the intranet team should not allow these projects to cut back on delivery of new features within the six-month timeframe, on the promise of more functionality to come at the completion of the infrastructure project. Intranet teams must also be careful to avoid the situation where long-term infrastructure projects drain too much of the team's resources.

Relying on other teams

In many cases, the intranet team will need to rely on other areas of the organisation to implement changes. For example, IT may be required to install the new search engine, or to implement the required online forms.

These *dependencies* should be added as additional constraints when conducting the scoping exercise. Activities can then be chosen that either avoid or mitigate these dependencies.

Including the dependencies as constraints is particularly important when the intranet team does not have a good or effective working relationship with key teams. For example, there may be a difficult relationship with the IT area which might strongly affect the ability to make platform changes or to conduct additional development.

Adjusting the planning process

Overall, the planning process (including the scoping activity) will need to be adjusted to match the characteristics and size of the organisation.

For example, the planning may take some time in larger, more bureaucratic organisations. It may take three or even six months to finalise the scope for the initial round of work.

In contrast, smaller organisations may be more nimble in their planning, particularly if the intranet (and the intranet team) has low visiblity. In many cases, this allows the intranet to plan and implement the initial round of activities 'under the radar'. The first set of deliverables should then raise the profile of the intranet, and start to establish the site as a more strategic platform.

In practice, sufficient time should always be allocated to the planning, even if it means delaying actual activities. While care should be taken not to get trapped in 'analysis paralysis', the reality is that the initial round of planning may take a little longer.

Once a precedent has been set for this type of planning, following six-month periods should go more smoothly and quickly. Even so, the intranet team may always end up with a one to two month gap between each six-month period, and this should not cause any insurmountable problems.

Alternatively, the planning process may cut into the six months, leaving potentially only four to five months to implement the changes and improvements. If this is the case, this should be factored in when conducting the scoping exercise to ensure that the activities can be completed within this more restricted timeframe.

Case study: new intranet in a small government agency

The scoping process outlined in this section was used very effectively in a small government agency. Recently formed from two earlier organisations, neither of which had an intranet, the merged agency was keen to establish a new intranet.

A new intranet manager was appointed, and she was given the task of launching a new intranet in three months. With a team of one, this was to include selecting and implementing a new content management system and writing new content, over a period that included the Christmas break.

It quickly became apparent that a traditional intranet development (containing common content areas such as HR, IT, forms, etc) was not going to be possible. If anything was to be launched at all, then managing the scope of the project was to be critical.

A scoping session was run early in the project, which revisited how to approach the creation of the new intranet, and what to include. In only 3 hours, this identified an entirely new scope for the intranet, quite different from the content that had been originally assumed.

The scoping session identified the following key criteria:

- Generate enthusiasm
- Useful for all staff
- Develop few things well instead of many things poorly
- Scalable design so no major redevelopments required
- Provide ‘must have’ functionality
- Make information easier to find

These key constraints were also documented:

- Not all content owners are enthusiastic
- Lack of resources
- Content not web ready
- Limited time to launch pilot
- Limited time to employ/deploy CMS
- Limited time to develop content

Out of this came a list of items for the initial launch, of which the following are a subset:

- Staff whereabouts
- Events/Screenings
- Corporate news
- Staff directory
- Resource bookings

This list of items for the initial intranet site was unlike anything we'd seen before. There was almost no content, as the two organisations were in the early stages of merging, and there were few finalised processes or policies. There was also little or no time to write or collate new material.

Instead, the initial intranet primarily consisted of small interactive elements, most of which would be provided out-of-the-box by the content management system (CMS). These then became selection criteria for the CMS.

There were considerable challenges in maintaining a focus on the defined scope, as well as delivering a new intranet with just a team of one. While there was not a strong understanding of the role of the intranet at senior management levels, this did give the intranet manager considerable freedom in tackling the project ('out of sight, out of mind').

Some care also had to be taken in selecting the content management system, to ensure that it delivered the much-needed functionality. There was also an imperative to implement and configure the system as quickly as possible. While timeframes slipped somewhat (mostly due to the vendor's limited resources), it still proved possible to get 95% of the desired features running in time for the launch.

In the end, the new intranet was launched in four months, only a month late. All of the planned functionality was included, and the site was a huge success from day one. Overwhelmingly positive feedback was provided, and the intranet manager was flooded with requests for additional items to be added to the intranet. The process of growing the intranet was then started in earnest...

Step 3. Determine a new version number

As discussed on page 48, the use of version numbers for the intranet is a powerful mechanism for reshaping how the organisation views the evolution of the intranet. The version numbers send the clear message that new functionality will be progressively delivered on the site, and that the intranet will be constantly evolving.

It also helps to build the understanding that there is no 'final intranet', and instead there is a progression of ever-better sites. The careful use of version numbers will highlight that there is much to be done.

The version numbers may help during the budgeting process, giving intranet teams a clear context for requesting funds on a regular basis, tied to the delivery of specific functionality and content.

Discuss during the scoping session

While this is listed as a separate step, it may be valuable to discuss the new version number during the scoping session. This can often help the intranet team determine whether what is being delivered is a 'point release' (ie 5.1) or a new 'version' (ie 6.0). This then assists in the use of the criteria and constraints, and helps to ensure that the outcome is practical and achievable.

Display the version number on the intranet itself

The version number can also be displayed on the intranet itself, on the home page or in the top banner. This can help to build broader awareness of the changes being made to the intranet, as well helping to support cultural changes in the way that the intranet is managed and used.

Tip!

As discussed on page 63, the use of version numbers is an optional element of the 6x2 methodology, and should only be used if it will be meaningful for the organisation.

The use of version numbers can easily be omitted without impacting on the rest of the approach outlined in this document.

Step 4. Review the in-scope list

Once the scoping session has been completed, the list of proposed activities must be reviewed with key stakeholders, including the overall intranet sponsor or owner. This review serves a number of purposes, as discussed in the following sections.

Explaining the approach taken

Applying the 6x2 methodology will often generate a list of activities that does not match the pre-conceived expectations of either the intranet team or the wider organisation.

While all of the chosen activities will (or should) have a strong basis for inclusion, the outcome of the scoping process will need to be communicated and explained to the key intranet stakeholders.

This discussion should focus primarily on the criteria and constraints, thereby giving context to the chosen list of activities. This will also give an opportunity for the use of version numbers to be introduced and reviewed.

Gaining further strategic input

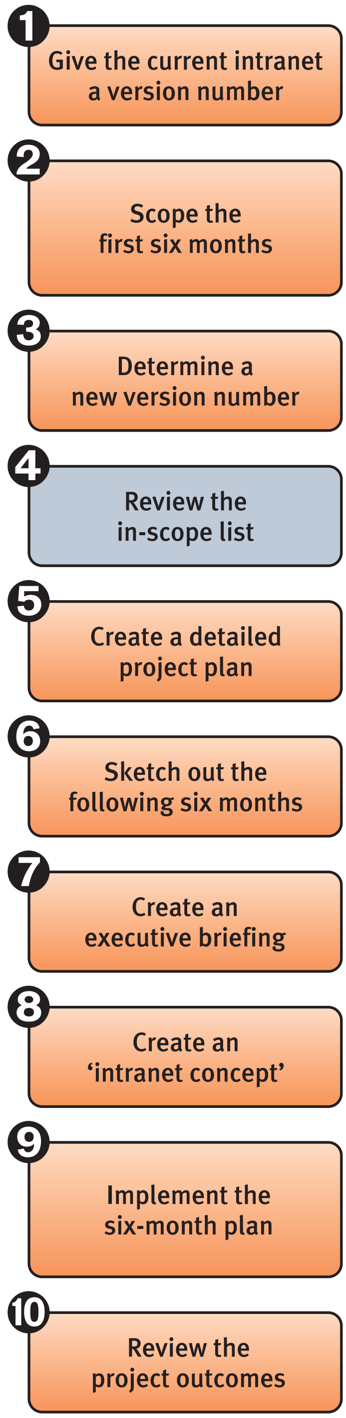
The overall intranet sponsor or owner will have a strong understanding of the broader organisational strategies and directions. This 'top-down' view is critical to the success of the planning process, as it ensures that the intranet is aligned with business goals and objectives.

In addition to the strategic input gained during the needs analysis (page 40), use the review session to gain further insight into organisational goals, and to gain input from the key stakeholders on the chosen activities.

This input can then be used to refine or revise the criteria and the selected activities. This will help to increase both the business value gained from the activities, and the ability of the intranet team to 'sell' the approach to senior management.

Tip!

If the intranet doesn't have a direct sponsor, gain some input from a 'switched on' senior manager who has a clear understanding of the organisation's business strategy.



Revising the scope

It will often be the case that senior management or key stakeholders have a strong desire to see a particular activity conducted, or a specific piece of functionality delivered.

This may have been discussed during the scoping process, but ruled out because it didn't match the criteria or fit within the constraints.

In this situation, there are only two real options:

- The first is to re-set expectations by clearly articulating why it cannot be included in the scope. The intranet team should return to the criteria and constraints, as well as making use of the notes recorded during the scoping session (as discussed on page 29).
- The second is to outline what constraints must be lifted in order to allow the activity to be included. Senior management then has the choice of providing additional resources to allow the activity to take place, or waiting until a later six-month period.

Finalising the list

Regardless of the specific discussions, it is important to 'socialise' the proposed scope before moving onto the detailed planning (outlined on page 67).

If the intranet sponsor responsible for authorising the scope was at the workshop, run through the agreed list of activities and enhancements. If not part of the session, explain the process followed including a high-level overview of the list of criteria and constraints.

Work with the intranet sponsor to identify any concerns they have about the list. Be prepared to make changes to the list based on their concerns, but resist modifying the list too much. Remind the sponsor of the process the workshop participants followed.

If you need to add items to the list, identify items that can be removed. It is important the list remains achievable.

Finalise the list and use it as documentation for the scope of the intranet activities. If the project is required to produce a formal scope document, include the criteria and constraints used to come up with content and functionality, and provide a high-level overview of the process used to define the scope.

Case study: startup intranet project

In one situation, a newly established intranet team within a local government body was given six weeks to launch a new intranet. (This deadline was used by the intranet owner to focus the intranet team, and to break them out of several months of 'analysis paralysis'.)

Six weeks was obviously a very short timeframe for creating an intranet, and it was critical to determine very pragmatically what could realistically be done.

A scoping session was held with the intranet team to identify the criteria, constraints and chosen activities. While this was naturally a comparatively short list, it included several key deliverables that would be of direct value to the organisation.

One item, however, generated considerable discussion. Within the intranet team, there was a strong desire to deliver a new internet-based 'phone directory'. While this had been identified as being very valuable for staff, it was ruled out of scope due to the limited time and resources, and the necessity for additional development.

When the final list of activities was discussed with the intranet owner after the session, the owner also highlighted a strong desire to have a corporate phone directory as part of the new intranet.

When the reasons were outlined for not including it in the scope of activities, the intranet owner asked the team: 'so what would you need to deliver this?'.

The intranet team indicated that they would need another two weeks in order to be able to deliver a new phone directory. The intranet owner was happy with this, and on the spot, the six week project became an eight week project.

Step 5. Create a detailed project plan

It is perhaps surprising that many intranet teams do not have documented project plans for the ongoing work associated with their sites. Worse yet, it can be hard for intranet teams to demonstrate after the fact what they have done in the previous six or twelve months, or to clearly show the benefits they have delivered to the organisation.

In part, the lack of a project plan is due to the inherent difficulties in managing a large and diverse corporate intranet. With much of the content and functionality on an intranet actually produced by other teams or business areas, it can be difficult for the intranet team to generate a concrete project plan.

While these issues are legitimate (and significant), teams still need to have ongoing project plans. Without this, it is not possible to manage resources or to deliver functionality in a timely way.

One of the purposes of the 6x2 methodology is to make it easier to create a project. By simplifying things down to a single six month period with defined deliverables, it becomes relatively straightforward to create a useful project plan.

Lightweight project planning

In general, the project planning should be lightweight but thorough. If there is a corporate-wide methodology for project planning, this should be used where appropriate.

Care should be taken, however, to ensure that the planning process does not get too weighed down by complex and formal methodologies. The 6x2 methodology is by design a fairly 'agile' approach, as the planning only needs to cover six months at any given point, with the scope of the activities limited by current constraints.

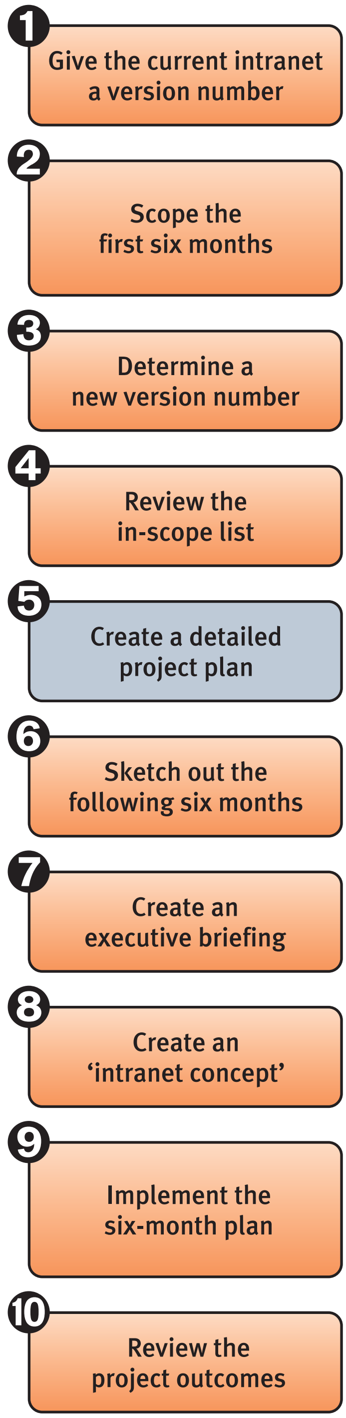
Tip!

If there is a corporate standard for project planning, there is often a 'project office' (or equivalent). This team should be able to provide support and resources to assist with the project planning.

Identifying and mitigating risks

Key risks should be identified at this point in the planning process. These should be documented in a simple but effective way, thereby ensuring that they remain in the minds of the intranet team throughout the implementation of the chosen activities.

Where possible, steps should be taken at the outset of the work to mitigate or eliminate these risks. If this is not possible, the risks should at least be highlighted to the intranet owner and other stakeholders, allowing them to assist where possible.



Building confidence

One of the unstated constraints for many intranet teams is their lack of credibility. This is often reflected in the difficulty in gaining sufficient budget and in overcoming internal politics.

A primary purpose of the detailed project plan is therefore to build confidence that there is a clear and realistic plan that will deliver the stated benefits. Having such a plan can do much for an intranet team when it comes to requesting further funding and support.

Experience has shown that simply having a concrete project plan can be enough to overcome some of the key barriers that block intranet teams.

> **Tip!**
>
> *The Art of Project Management* by Scott Berkun is a book devoted to managing design-intensive initiatives such as intranet projects. It provides many practical tips and approaches, focused on making the project successful even in complex business environments.
>
> One of the suggestions in this book is to use a simple and highly visible way of listing activities and tracking status. For example, a whiteboard in a common area can be used to summarise the project plan at a high level, giving every team member an overview of where the project is up to.

Step 6. Sketch out the following six months

The basis for effective planning is to know three things:

- where the organisation is currently
- what we are doing now
- where we go after that

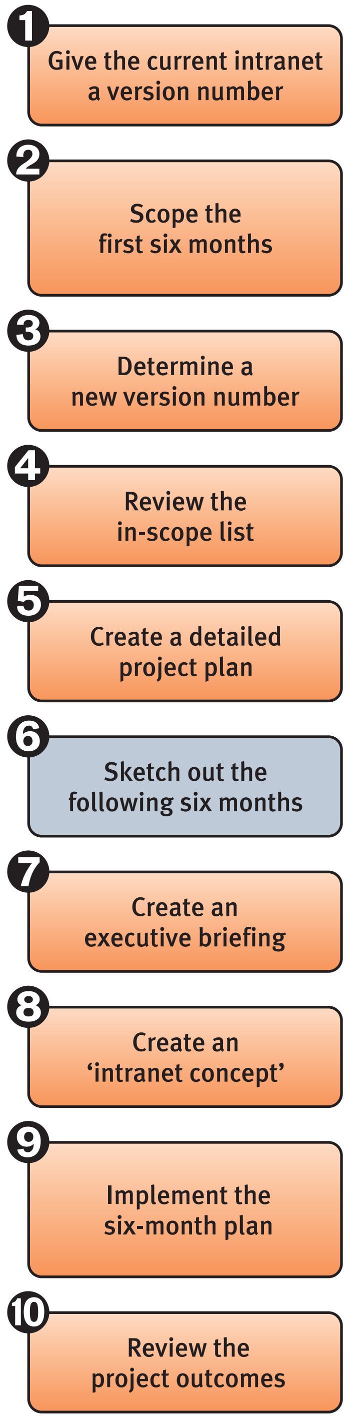
At any given point, if these three things are known, there is a workable roadmap. This is the reason for identifying the potential activities for the second six months: it clearly articulates where the intranet is heading into the future.

For this reason, the specific items are not the important element. Instead, the primary purpose of the second list of activities is to communicate with the organisation, and to help build momentum for further intranet improvement.

The discipline of the detailed project planning (page 66) should provide a strong basis for determining what is likely to be achievable in the following six months.

Use the detailed project plan to ensure that the items being considered are realistic in light of likely resource constraints, reliance on other teams, and internal politics.

This review doesn't need to be as in-depth as the initial scoping exercise, just enough to 'sketch out' what might be included, and to come up with a possible list of activities. The overall goal is to give a sense of where things might head into the future, recognising that a detailed re-scoping exercise will be conducted at the end of the first six months (see page 87).



Step 7. Create an executive briefing

An executive briefing outlining the proposed plan for the improvement of the intranet is a key tool for building support and sponsorship. In practice, there are several possible formats for this briefing:

- PowerPoint presentation (or equivalent)
- Briefing document

Each of these is discussed in the following sections.

Preparing for the presentation

Ideally, members of the executive should be approached before the briefing, to obtain advice on the best way to give the presentation and on the key details that will be expected. The presentation can then be prepared accordingly.

For example, do the executive like visually attractive presentations with diagrams and images, or are they fact-oriented? Either way, the presentation should be designed to match what the executive want (while still conveying the important messages), rather than what the intranet team thinks they should present.

Ideally the intranet owner or sponsor is one of the executive members, and should be well placed to provide this kind of input. Preparing the presentation in this way will do much to ensure that it is well received, particularly if the groundwork has been laid before the meeting itself.

Executive presentation

It is fairly common to produce a PowerPoint file (or equivalent) to support an executive presentation. This can increase the impact of the presentation, and ensure that the key points are clearly communicated.

The presentation can be constructed as follows:

- Slide 1: current situation
- Slide 2: overall strategy/approach (derived from the criteria)
- Slide 3: activities for the first six months
- Slide 4: deliverables and outcomes
- Slide 5: strategic benefits (aligned with organisational goals)
- Slide 6: future directions (indicative list of activities for following six months)
- Slide 7: other desired activities?

Created well, this should be a compelling pitch to the senior executive, and it should help build confidence in the intranet team, and visibility for the intranet. It should also help to put in place the early foundation for additional requests for resources to support future intranet development.

The last slide should also be used to initiate a discussion with senior management about their expectations, giving them a chance to highlight activities that they think should be included in the scope.

Where appropriate, these can be reviewed during the session itself, or taken away to be further considered. Either way, it is vital that a meaningful discussion is held with senior executives to ensure that their satisfaction levels are high.

Detailing the overall strategy/approach

Slide 2 of the presentation gives details on the overall strategy or approach. While this has not been specifically documented earlier in the 6x2 methodology, it is easy to derive from the criteria used during the scoping process (page 32).

For example, the criteria can be rewritten into a narrative:

> The first six months will focus on delivering functionality that will increase overall intranet usage, as well as demonstrating the continuing value of the site. These tangible and visible benefits will generate greater momentum for the intranet, as well as addressing key business issues. Steps will also be taken to build further support for the intranet team, to allow it to be more effective at delivering future intranet improvements.

While the actual words will obviously depend on the situation, it should be possible to write them quite directly from the criteria used to select the first six months' activities.

In this way, the 'strategy' has been developed without having to conduct a separate high-level exercise. Having the approach 'fall out' of the criteria for delivering a better intranet does much to ensure that the overall direction is clear and meaningful.

(For more on the issue of 'intranet strategies', see page 79.)

Document format

Communicating the strategy and direction of the intranet should never be left solely to a PowerPoint presentation. While this is ideally suited to supporting a formal meeting with the executive, it is a poor format to capture the details in a way that will be meaningful to a wider audience.

The presentation should be supported by a brief document outlining the same points. A recommended way for creating this document is outlined in the next step of the methodology (page 73).

Later six-month periods

The creation of an executive briefing is crucial at the outset of the 6x2 methodology, as it gives the intranet team much-needed visibility at senior management levels and communicates the new approach to managing the intranet.

Once a greater level of momentum has been built up, the need for a formal (and highly polished) presentation may lessen. However, it will always be important to communicate clearly and powerfully to management.

For this reason, the intranet team should always have an up-to-date presentation or document that summarises what is being done. This is a living document that concentrates on communicating: where things are, what is being done, and where we go after that.

Once activities have been completed, they are moved from the second section (what is being done) into the first (where we are), allowing the briefing to keep pace with ongoing progress.

Having this document to hand means that the intranet team will always be ready to give informal or off-the-cuff presentations, greatly helping to build buy-in and support.

Step 8. Create an 'intranet concept'

It is easy to get caught up in the day-to-day work of the intranet and to forget to communicate clearly to the organisation as a whole. For this reason, creating a communications message (an 'intranet concept') has been included as a key step within the 6x2 methodology.

Communicating clearly to the organisation as a whole is not easy. Traditionally, the overall direction of the intranet is captured (and communicated) in one of two ways:

- Intranet goals or vision, which are too short and high-level to be meaningful for staff (as discussed on page 73).
- Intranet strategy document, which is too detailed for a broad audience within the organisation (as discussed on page 74).

Intranet goals: too short

There are good goals and bad (useless) goals for an intranet. The worst goals don't really say anything, such as 'create a one-stop shop for corporate information'. These goals are similarly ineffective:

- provide all staff with the information they need to do their jobs
- create a central repository for key corporate info
- efficiently disseminate accurate information in a timely fashion
- improve access to information
- deliver an easy-to-use source of consistent and accurate information

All of these goals provide little or no direction for the site, and do not define what will actually be delivered.

While these are obviously very poor intranet goals, even good goals have limits. This were the goals determined for an educational organisation:

- support and enhance the delivery of education
- provide a single, coordinated communications channel to all staff
- deliver staff productivity benefits
- improve the consistency of operations across the organisation
- support the creation of a single corporate culture
- provide a platform for business tools and systems

While these are not perfect, they are pretty sound. Each one of these has a solid basis, and overall, the goals appear to capture the overall purpose for the intranet.

The problem is that, time after time, these sorts of goals do not have any clear impact on the management or direction of the intranet. Looking at the experiences of many organisations, a number of significant issues and limitations become apparent with the use of goals in this form. These include:

- *Too abstract*. When distilled down to a small list of goals, the purpose of the intranet is inevitably made into something very high-level and abstract.
- *Doesn't resonate*. These types of goals just don't seem to connect (or resonate) with staff, whether stakeholders or end-users.
- *Doesn't create change*. Fundamentally, defining goals in this form seems to have little or no impact on the actual intranet activities being conducted.
- *Difficult to measure*. Defining metrics or success criteria for these goals is often hard, if not impossible.
- *No activities*. Intranet goals often do not make it clear exactly what should be done (or needs to be done).

All of this is not to say that defining intranet goals is a wasted effort, just that they cannot stand alone and be useful. Instead, they should form part of a broader statement of the intranet's direction (as part of the 'intranet concept' discussed in this section).

Intranet strategy: too long

There is something about the format of intranet strategy documents that automatically and unavoidably makes them boring.

Much of the 20+ pages ends up devoted to the overall governance and ownership of the project (and the intranet), with only a little space devoted to the actual activities.

In many cases, the intranet strategy documents becomes more of a business case, targeted solely at the steering committee or other group that has the responsibility for signing off the project (and providing the budget).

Intranet strategy documents are also generally built around a standard project template, with formalised sections and headings. This further reduces their impact and limits their use beyond gaining executive sign-off.

Strategy documents are often strong on theory, but weak on the actual steps that will be taken to deliver an improved intranet. They commonly also fail to clearly articulate the benefits that will be delivered to the business.

Not all strategy documents suffer from these weaknesses, and there are certainly better examples (and worse).

However well written, 20 pages is simply too long. Business stakeholders and end-users are not sufficiently interested in the intranet to set aside the time to wade through (and understand) a document of this length.

As a result, many intranet strategies have been written that are rarely read and little used (even by the intranet team that created them).

Creating an intranet concept

Instead of these two approaches, the communications message must be carefully tailored to ensure that it is meaningful to the broadest possible audience.

For this reason, the communications message should be written in the form of an 'intranet concept', which is a one-page document written in narrative format.

This flexible document can be used in many different ways. For example, it can be published on the intranet, included in the company newsletter, or sent as part of email communications to key stakeholders.

Choosing when to use the intranet concept

In practice, intranet teams should make a pragmatic decision about when to make use of the communications message. Where appropriate, this can be used at the outset of the six months to set expectations and to start to build enthusiasm and interest.

In some situations, however, it may be more prudent to use this communications message at the 'go-live' date, to protect the intranet team against the impact of changing resource levels and other constraints.

Regardless of when it will be used, the intranet concept should be created at the outset of the project, to give another 'sanity check' that what is being delivered will be of interest (and value) to the wider business audience.

Note also that it may not be necessary to create a full intranet concept for later six-month periods. Remember that it will always be important to communicate clearly to staff what is currently being done on the intranet, even if this communication is not done formally.

For this reason, the intranet team should always have an up-to-date version of the intranet concept to hand, even if later six month periods don't require as high a standard. The regular six-monthly planning process provides a good reminder to update the intranet concept as required.

Intranet concept (narrative format)

Figure 10 shows an intranet concept written in narrative format.

One of the major benefits of the narrative structure it is a much more compelling style of writing that will have a stronger resonance with staff. While the appearance of the intranet concept written in this format is not exactly 'sexy', it is both effective and easy to read.

The intranet concept consists of four main sections, each of which is discussed below.

Current situation

The current state of the intranet should be described in a clear and powerful way, with the goal of highlighting the existing deficiencies and issues.

The broader organisational context should also be described, outlining where the intranet activities fit in. The objective is to outline the clear need for the intranet project, and to create a sense of urgency.

In the example, there was less need to discuss the existing intranets, as there was a clear organisational imperative to deliver a new solution, derived from the merger of the existing health care providers to form Eastern Health.

Overall direction

The overall direction of the intranet (and the intranet project) is then outlined. This spells out where the intranet will be heading, as well as clearly stating where the priorities lie.

This is where the criteria from the scoping exercise (page 51) are used to communicate the direction of the project.

Specific deliverables

These are the specific activities identified during the scoping exercise, chosen because they are both doable, and worth doing. (See page 29 for more on this.)

Longer-term direction

Beyond the initial deliverables, the intranet concept should outline the longer-term directions for the intranet, and the broader priorities for the intranet team.

As the team has already sketched out the possible activities for the coming six months (page 69), this should be easy to document. Having a list of concrete (if provisional) activities should do much to give a clear sense of where the intranet is heading.

Creating a regional intranet

Eastern Health has been created with the goal of delivering improved services to the local community, through the development of a more integrated and effective health care system. As part of this, a new regional intranet will be created that will grow to provide a single point of access for all staff across the region. This will replace the current intranets serving the former organisations, all of which were fragmented and operating poorly.

The new regional intranet will start small, and will expand in step with the establishment of new structures and processes across the organisation. More than just a source of information, it will be a key business tool that will support the day-to-day activities of staff, with an equal focus on corporate and clinical needs.

The regional intranet will be developed in stages, to ensure that clear benefits are delivered to staff as quickly as possible. We have clearly defined goals for the regional intranet:

- assisting in the delivery of consistent and effective health care
- streamlining administrative and corporate processes
- reducing duplication and supporting the pooling of resources
- supporting and promoting the regional identity of Eastern Health
- recognising the efforts and achievements of Eastern Health staff

The first stage will involve the creation of a 'core regional intranet' that will deliver a range of simple but effective tools that will provide immediate benefits to staff. For example, we will be delivering:

- A consistent set of clinical reference materials brought together, so that medical staff working across multiple locations have access to the same information.
- All the maps of Eastern Health facilities in a single location, including key supporting information for staff such as parking details and driving directions.
- A single point of access to the current intranets maintained by Eastern Health, Eastern Public Hospital, and others.

Over time, we will build on this starting point to deliver further tools and content. This will involve supporting strategic initiatives such as the 'Improving Care' programme, and other improvements planned throughout the region.

The existing intranets will also progressively be merged into the new regional intranet, to create a single environment that meets both regional and local needs. When completed, this will have a consistent appearance and structure, making it much easier to find and use key information. It will also enable us to rework and restructure the intranet, to make it more relevant to day-to-day activities across Eastern Health.

Your input into this process is critical, and as the project proceeds, we will be spending time talking with staff throughout the organisation to identify key opportunities for improving practices and information.

While Eastern Health has been recognised as an innovative provider of health care services, our information resources for staff have been less than adequate. We will be fixing this, delivering step-by-step improvements that will support staff throughout the evolution of the new region.

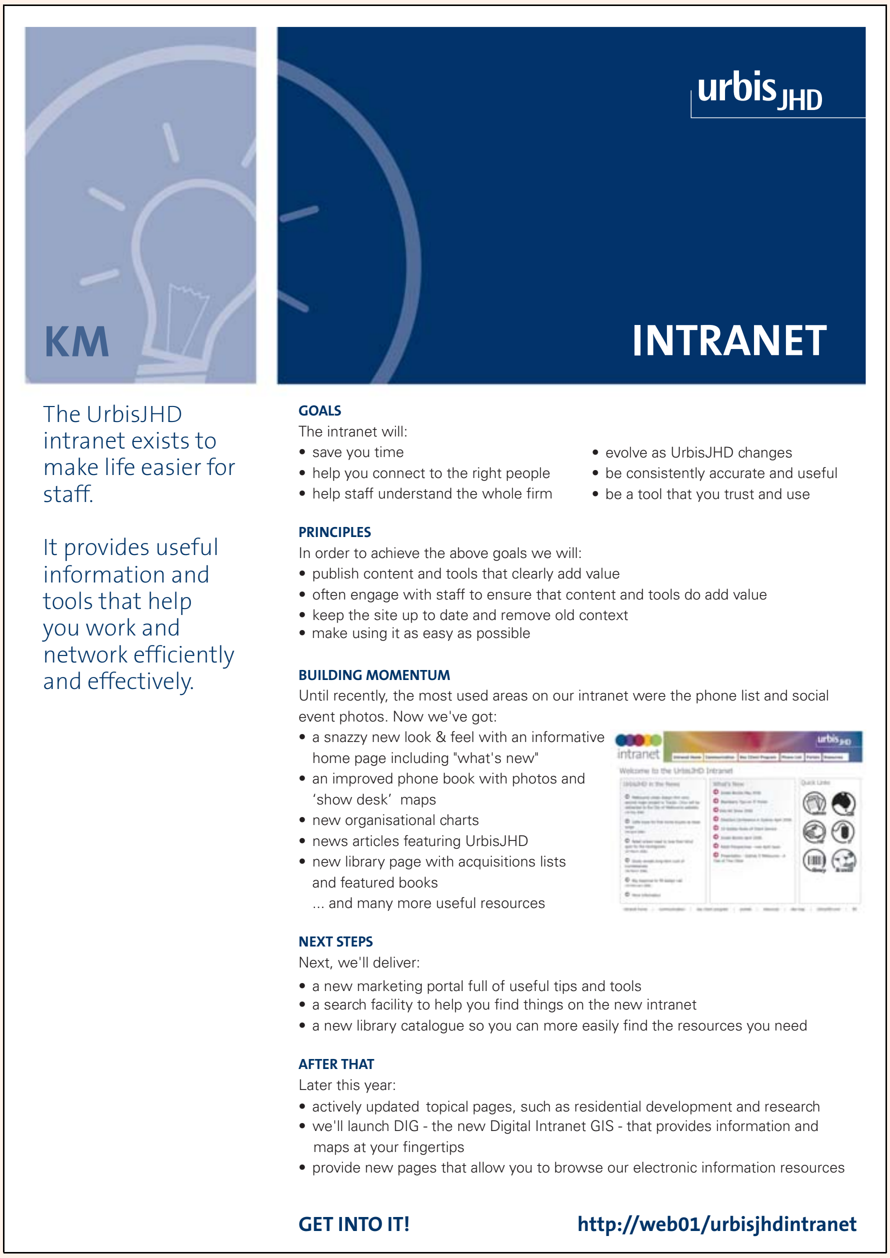
There is still much work to be done, but today we start the process of building a new intranet that will be of real assistance to all staff.

Figure 10: An 'intranet concept' written in narrative format, for the creation of a new intranet to serve a merged health care organisation.

Where appropriate, the intranet team can also indicate longer-term strategies or directions, in addition to the possible activities chosen for the following six months. This can help to give the sense of a roadmap that stretches into the medium term, beyond the focus on immediate activities.

Intranet concept (brochure format)

In contrast, Figure 11 shows an example of an intranet concept, presented in a 'brochure' format. (Thanks to UrbisJHD for providing this real-life example.)



urbisJHD

KM

INTRANET

The UrbisJHD intranet exists to make life easier for staff.

It provides useful information and tools that help you work and network efficiently and effectively.

GOALS

The intranet will:

- save you time
- help you connect to the right people
- help staff understand the whole firm
- evolve as UrbisJHD changes
- be consistently accurate and useful
- be a tool that you trust and use

PRINCIPLES

In order to achieve the above goals we will:

- publish content and tools that clearly add value
- often engage with staff to ensure that content and tools do add value
- keep the site up to date and remove old context
- make using it as easy as possible

BUILDING MOMENTUM

Until recently, the most used areas on our intranet were the phone list and social event photos. Now we've got:

- a snazzy new look & feel with an informative home page including "what's new"
- an improved phone book with photos and 'show desk' maps
- new organisational charts
- news articles featuring UrbisJHD
- new library page with acquisitions lists and featured books

... and many more useful resources

NEXT STEPS

Next, we'll deliver:

- a new marketing portal full of useful tips and tools
- a search facility to help you find things on the new intranet
- a new library catalogue so you can more easily find the resources you need

AFTER THAT

Later this year:

- actively updated topical pages, such as residential development and research
- we'll launch DIG - the new Digital Intranet GIS - that provides information and maps at your fingertips
- provide new pages that allow you to browse our electronic information resources

GET INTO IT! **http://web01/urbisjhdintranet**

Figure 11: An intranet concept in a more graphic-intensive brochure format.

(Thanks to UrbisJHD for providing this real-life example.)

This contains much of the same information as the earlier example, but focuses on creating a high-impact document, rather than on using a narrative structure.

Overall, this creates a much more 'sexy' deliverable, and the high quality of the document itself helps to build trust in the intranet project (and the intranet).

The effort put into creating this type of deliverable sends the message that the intranet team is serious about the project, and equally serious about communicating effectively with the organisation as a whole.

While a description of the current state has been omitted from the brochure, much of the rest of the detail is between the two examples.

Overall, this example uses clear language to paint a picture of what is being done (and why) and shows that an intranet concept can be delivered in a wide variety of ways.

The only defect of this particular example is that some of the items focus more on the details of the intranet itself, rather than on the business-oriented capabilities to be delivered. There are still plenty of excellent items listed, and it is a useful reminder that it is always easy to fall into the trap of focusing on the 'how' rather than the 'what'.

Overall the UrbisJHD team are to be commended for their efforts on this document, and it displays a clear commitment to clear and effective project planning, in the context of a broader intranet strategy.

Tip!

Regardless of the format of the intranet concept (narrative or brochure), there is considerable value to be gained by creating a very professional communications message. The quality of the appearance and layout does much to build confidence and trust in the intranet, and it sends the message that the intranet is committed to working closely with the organisation.

Use the organisation's annual report (or equivalent) as a benchmark. The intranet team's communication messages should be at this standard (or a little below), and this will likely require some assistance from a professional designer and editor.

'Elevator pitch'

Another way of looking at the creation of the communications message is the need for an 'elevator pitch'. This is a 30-second summary of what is being done that can be quickly and easily used when talking with senior management or other staff.

There is often a very limited opportunity to 'sell' the benefits of the intranet and the purpose of the current project. This is particularly the case when dealing with senior management, who have many demands on their time.

The creation of the intranet concept (in either a narrative or brochure format) should also be used as an opportunity to polish a 30-second elevator pitch for the intranet.

This can be refined over time, and adapted to fit the specific audience you are communicating with.

Step 9. Implement the six-month plan

Once the planning has been completed, all that remains to be done is to implement the chosen activities over the coming six months. While this is easy to say, there are obviously many challenges and hurdles to overcome in order to successfully deliver the planned functionality.

There is much that can be written about project management of these types of projects, and to a large extent this is beyond the scope of this report.

The following sections do, however, provide some suggestions and tips for the management of the implementation phase. These have been drawn from observations of successful intranet teams, and are based on the day-to-day challenges faced by many teams.

Identify concrete activities for each team member

Provide each member of the intranet team with a list of their activities for the coming six months, drawn from the overall project plan. This ensures that there is a concrete plan of action for delivering the functionality, as well as clear responsibilities for each individual in the team.

Consult all team members when allocating work, and make sure that staff are engaged and in agreement with what they will have to deliver. Where necessary, adjust the spread of work based on feedback and suggestions from the team.

The result of this process should be a simple 'to-do list' for each team member, along with key dates and deadlines.

Avoid scope creep

Resist the temptation to include any 'wish list' items in the scope at this point in the project. While it is appealing to include some 'if we have the time' items, this sets an unrealistic expectation for the team, as well as affecting the viability of the project planning.

If it proves possible to deliver all of the planned activities before the six months are up, the intranet team can deliver some extra functionality. Experience has shown that it will not be hard to identify some additional items that would be desirable and possible to deliver.

Hold regular meetings

Regular status meetings should be held to assess the ongoing progress of the project, and to identify issues as they arise. This should involve all of the core intranet project team, along with any other key stakeholders (such as the point of contact in IT, or the intranet sponsor).

These meetings should be light on formality, and should focus on working through current issues in a constructive way. The meetings should be documented (even if only quickly), to avoid confusion or revisiting of past issues.

Tip!

Wednesday can be a good day for the regular team meeting, as it allows the last two days of activities to be reviewed, and the coming two days to be planned.

Tip!

If the meetings are held regularly in a single location, considering using a whiteboard (or equivalent) to document the outcomes. This is a quick and easy way of recording the session, as well as providing a very tangible reminder throughout the project of the decisions made.

Keep contact with staff

One of the greatest dangers facing intranet teams during the implementation phase is that they can easily 'lock themselves away' to work on the project, and in the process lose sight of staff needs or issues.

This is only one six-month period of the ongoing work on the intranet, and the intranet team must avoid focusing too narrowly on the immediate deliverables.

Time should still be allocated to talking with staff, to dealing with day-to-day needs, and involving a broad range of stakeholders. Beyond the longer-term benefits, this will allow the intranet team to quickly identify issues or changing requirements that will impact on the current batch of work.

Communicate extensively

Schedule regular opportunities to update key stakeholders and senior management on the progress of the project. Equally importantly, use these sessions to gain input from the stakeholders, allowing the project to successfully adapt to changing needs or internal politics.

The intranet team should devote effort to understanding the interests and motivations of key 'influencers'. Intranet communications should then be made in terms that reflect these interests and points of view.

Only by building relationships with these key influencers will the intranet team be able to build the momentum required to deliver the next round of activities.

Celebrate wins

Many intranet teams are great at delivering new functionality, but are poor at actually communicating these successes to the wider organisation.

Intranet teams should start by celebrating 'wins' within the team, to sustain the enthusiasm and morale of the team members. Even when these successes are small, low-key celebrations can be held (such as a morning tea or a lunch at a nice restaurant).

Larger wins should be celebrated more visibly, ideally involving key stakeholders and influencers. The profile of these successes should also be raised throughout the organisation, by methods such as including an item in the staff newsletter.

Work on relationships within the team

The implementation phase of the project should provide an opportunity to build relationships *within* the intranet team. For the intranet manager, this means understanding the *motivation* of each member of their team, and answering the questions:

- What can each team member do?
- What do they want to do?

Building this understanding allows the intranet manager to allocate work in the most effective way, both to deliver the required functionality and to sustain the motivation and interest of each team member.

Ensure that the intranet team devotes some time to themselves on a regular basis, as this is a marathon, not a sprint. While the 6x2 methodology focuses on just six months at a time (which is a very tight timetable), this is just one cycle of ongoing intranet work.

Actively look for issues

The temptation is always to stick to the project plan, even in the face of organisational changes or issues. The intranet team may also get too caught up in the actual work to spot issues before they become major problems.

The solution to both of these problems is to actively look for potential issues or changes that may impact on the project. Taking this 'eyes wide open' approach will do much to help the intranet team adapt to changes.

Agree on a change process

There will undoubtedly be situations in which the plan or approach will need to be changed during the implementation phase. These changes can potentially be very disruptive, and it is important to agree in advance how the changes will be managed.

Fundamentally, the following questions need to be answered at the *start of the project*:

- What situations or conditions will be required to force a change to the project plan?
- What process will be followed to review and agree to the changes?
- Who has the final say on whether a change will be made?

The last question in the most important one, as there must be a single person who has the authority (and responsibility) to decide on changes to the project plan. This may be the intranet manager, or the project sponsor, but either way this must be agreed in advance.

Step 10. Review the project outcomes

At the conclusion of the six months, the intranet team should review the outcomes of the project using a lightweight 'lessons learnt' methodology. This provides valuable input into the next round of six months, allowing the intranet team to build on its successes.

The focus of the review should be on the detailed project plan, to identify areas where estimates were incorrect, or where dates weren't met. Specific attention should be paid to areas where unexpected issues arose that affected the delivery of project objectives.

It should also be possible to identify at least a few additional constraints that weren't identified at the outset of the project (page 35). Look for situations where the schedule wasn't met, or the planned functionality wasn't delivered. Explore the underlying reasons for these issues, and use these to capture any extra constraints for the next round of planning.

In practice, this 'lessons learned' activity is often skipped, to the considerable detriment of project teams. Since the 6x2 methodology is cyclic, there is a natural point at which to do the review, and a clear way of making use of the results.

This is also a natural point for a celebration within the intranet team, even if this is done informally. It is important to recognise the achievements of the team at the end of each six-month stage, to sustain enthusiasm and energy.

The review process should therefore not just focus on 'what went wrong', but on recognising the value of the functionality or content delivered and the successes of the team.

'Lessons learnt' methodologies

There are many practical methodologies for reviewing the success of a project. These approaches may be called different things, including:

- lessons learned
- post-implementation review (PIR)
- after-action review (AAR)
- project debrief

These methodologies all provide a constructive framework for evaluating the execution of the project, identifying problems encountered, and capturing potential improvements or ideas for future projects.

These types of reviews are well established within many organisations, and are a proven way of building a 'learning culture' within project teams. While they were most notably used first by the US Army, they are now used across many industries.

For more information on some of the common approaches, see:

- A Leader's Guide to After Action Reviews (US Army)
  www.au.af.mil/au/awc/awcgate/army/tc_25-20/table.htm
- Center for Army Lessons Learnt (US Army)
  call.army.mil
- After action reviews (NHS)
  www.nelh.nhs.uk/knowledge_management/km2/aar_toolkit.asp

All these methods use a collaborative approach to discussing the outcomes of the project. Most involve capturing some light weight documentation, for the benefit of future team members.

Continuing the process

Once the first six months has been successfully completed, the process then starts again from the beginning. This includes conducting a full scoping exercise that creates a new set of criteria and constraints, and then evaluating the list of possible activities.

> **Tip!**
>
> New items should be added on a regular basis to the possible list of future activities. When there is a request from a business area, or a new opportunity is identified, note it down.
>
> This ensures that nothing is forgotten, and positions the intranet team for future scoping activities.

The detailed project planning is then redone (which is often much quicker the second time around), leading to the creation of a new executive briefing and intranet concept. The following six months are then sketched out.

This means there is a detailed plan for the coming six months at any given point, along with an outline of the following six months. This rolling 12 month process then continues for the lifetime of the intranet, with progressively larger activities being tackled as a result of the upwards spiral.

Once the intranet planning process is well established, it can then be relaxed as required. For example, the length of the planning and implementation cycle may be increased from six months to nine or 12 months, to allow larger pieces of functionality to be delivered.

The intranet team may also be better placed to conduct longer-term or larger-scale work, which may take more than six months to deliver. This can be done alongside short-term activities, although care should be taken to ensure that there is a steady progression of deliverables.

Regardless of the specific approach taken, there are long-term benefits in continuing to use version numbers for the intranet, as this helps to embed the concept of incrementally improving the site in the organisation's culture.

Use at multiple levels

While the 6x2 methodology has been designed to manage the planning of the intranet as a whole, it can be used in other ways and at other levels.

For example, a redesign of the HR section may be planned as part of the coming six months. This is potentially a very large piece of work, and it will be important to carefully scope this, to ensure that clear benefits and deliverables are generated by the end of the six months.

In this situation, the 6x2 methodology can be repeated at a lower level, focusing on the HR redesign. Done in even a light weight way, it can be a valuable tool to engage key stakeholders, to scope the overall approach, and to set realistic expectations. The output is then feeds back into the broader intranet planning.

The 6x2 methodology can be just as valuable when planning other information management activities (such as portal or collaboration projects).

It can also be used for intranet 'sub-systems' such the staff directory or employee self-service. In these cases, the scoping process can be used to prioritise the additional functionality to be added.

Once the use of the 6x2 methodology has been established for the intranet, explore whether it can be used more widely in your organisation.

Where does strategy fit in?

Keen-eyed readers may have noticed the very few references to an 'intranet strategy'. This may appear odd (or even bizarre) for a methodology that is focused on the ongoing planning of intranet developments. There is, however, a reason for this.

In most organisations the 'intranet strategy' is a document. Generally a fairly large document, it outlines at a high level the goals and directions for the intranet.

In practice, intranet strategies often cover:

- summary of current intranet or information management problems
- high-level intranet goals
- position or vision statement
- framework showing where the intranet fits into overall information management strategies and systems
- guiding principles (such as usability and accessibility)
- intranet governance model
- authoring or publishing models
- intranet responsibilities

As outlined on page 74, there are some common issues with these strategy documents, including, at the most basic level, their length.

Intranet teams generally produce these strategy documents in an attempt to build the legitimacy of the intranet, and to gain a 'mandate' for the intranet team.

There is also the perception that planning must start at the highest level, and then work down to the actual activities. The natural starting point is therefore to create an overall intranet strategy document.

> **Tip!**
>
> In many cases, the organisation is not demanding a 'strategy' from the intranet team. Instead, it is the intranet team itself that identifies the requirement for writing such a document, as part of the ongoing efforts to build support at senior management level.
>
> While a strategy document will certainly be needed at some point, it should not be produced to early. Instead, the intranet team should initially focus on delivering functionality in a quite 'tactical' way, then following this up with a broader strategy when the organisation is receptive to (and ready for) such a document.

There is nothing inherently wrong with the concept of an intranet strategy, and there is no question that one will be needed at some point. The question is, however: when should the intranet strategy be created?

Experience suggests that the intranet strategy should not be created at the outset. The constraints on the intranet (as discussed on page 52) present considerable challenges to creating an effective intranet strategy, namely:

- lack of executive support and sponsorship
- lack of an overall information management policy
- no clear role for the intranet
- lack of credibility of the intranet team
- siloed organisation
- limited engagement from business areas

All of these make it very hard, or impossible, to create an intranet strategy that will have the desired impact on the organisation. Only when some (or all) of these constraints are eliminated does it become possible to create a meaningful intranet strategy.

Thankfully, the 6x2 methodology provides a straightforward answer to these issues. Simply add 'create an intranet strategy' as one of the items to consider as part of the scoping process (page 49), alongside all of the other possible activities.

Evaluate the intranet strategy in the same way as every other activity: does it match the criteria and fit within the constraints? Either it is possible to create the intranet strategy, and valuable to do so, or it should be left for a later six-month period.

In this way, the intranet team has a method to get beyond the default preconceptions about how to best manage the intranet, and instead schedules the intranet strategy for the time when it will be most valuable.

Experiences across many varied organisations have very clearly shown that intranet teams will benefit by focusing on what will be delivered, rather than getting caught up in the very difficult job of creating an 'intranet strategy'.

All of this is not to say that intranet teams should not think about the future. There must still be a clear direction for the intranet (and intranet team) to follow, and this will need to be conveyed most strongly to the senior executive and intranet sponsor.

This intranet 'vision' may be quite high level, and will certainly evolve over time as the intranet shifts in its role. It will often be fairly easy for intranet teams to articulate this long-term direction (this was never one of the real problems), but the challenge remains to come up with a roadmap for how to get there. This is the role of the 6x2 methodology.

End-to-end case study

This case study gives an outline of the process followed within a large corporate environment, with the aim of providing a concrete example of the 6x2 methodology in action.

The message from this project was clear: even when the intranet for a 10,000+ person organisation is managed by an intranet team of less than one, with extremely limited support and resources, there is still productive work that can be done.

It doesn't get much harder than this situation, so if the 6x2 methodology works here, it will work in pretty much any situation.

The firm in question is a large manufacturing firm with more than 15,000 staff, spread across Australia and into South-East Asia. The organisation was very fractured by silos, with many different business units and divisions. There were a handful of core manufacturing facilities, each of which had very different working practices and culture.

Matching the organisational structure, the intranet consisted of many different sub-sites, each serving an individual region or office. These sites were managed in a very decentralised way, using a mix of tools, although the majority of content was published using FrontPage or Dreamweaver.

On top of this, the corporate intranet provided a thin veneer of global navigation and links through to the separate sub-sites. There was no centralised content management system (CMS), and the search worked so poorly as to be useless.

There was little overall management of the site, no defined publishing model, and the intranet as a whole was inconsistent and out-of-date. Individual areas made use of their local site, but usage of the intranet as a whole was comparatively low, and staff consistently had difficulty finding required information.

The intranet 'team' consisted of two-thirds of a staff member, with the sole Intranet Manager often being dragged away to assist with IT projects. Much of the remaining time was spent dealing with operational (rather than strategic) issues.

While the goal was clearly to radically improve the intranet, there was little buy-in from either senior management or regional stakeholders. With very limited resources and a small operational budget, it was also difficult to see how best to tackle these big issues and needs.

Two days were therefore devoted to using the 6x2 methodology to develop a new scope for the intranet. By the end of the first day there was a clear understanding of the current situation. By the end of the second day, the criteria, constraints and activities had all been identified. The results of this are outlined in the following sections.

Key criteria

The following were identified as the top six criteria (out of a longer list):

- increases intranet usage
- delivers value to the business and end users
- high visibility
- helps build momentum for the intranet (and team)
- can be communicated (success stories)
- builds trust in the intranet team

Key constraints

The following were identified as the top six constraints:

- business culture (regionalism, silos, etc)
- staff resources
- budget limits ($)
- no executive sponsorship
- current lack of trust in the intranet (and the intranet team)
- lack of clarity around the role of the intranet

Scoped activities

Item	In scope?	Notes
Home page redesign	✔	Hard to do well, but high visibility and value. Will increase intranet usage.
Design guidelines	✘	Low visibility, no impact on intranet usage. No momentum, no success story.
Communities of practice	✘	Out of scope until communities of practice themselves are fixed.
Intranet end-user guide	✘	Dependent on the intranet being (somewhat) fixed first.
Point solutions	?	Delivers business value and success stories but constrained by resources.
Reposition intranet manager role	✔	Invisible but fundamental, pre-condition for addressing resource constraints.
World times	✘	Novelty value only, no business impact, doesn't build momentum.
Information management policy	✘	Out of scope for the intranet team, hits many of the constraints.
Search	✔ (assuming it can be done well)	Builds usage and interest, generates momentum, delivers value. Resource constraints may be significant.
Visibility at senior executive level	✔	No direct impact on business, but important for building trust in the intranet team. Constraints include the current lack of clarity around current intranet.
Overall site redesign	✘	Meets criteria. Resource constraints, business culture, lack of executive sponsorship.

Item	In scope?	Notes
Authoring models/guidelines	✘	Low visibility, no business impact, doesn't build momentum.
Consistent look-and-feel across site	✘	Doesn't meet criteria, hits resource and cultural constraints.
Intranet goals	✘	Can they be created now?
...	...	...

Executing the plan

One the key constraints identified during the planning sessions was the lack of staff resources. Without a supporting team, the intranet manager had little scope to do more than simply run the intranet day-to-day.

It was therefore agreed that the intranet manager would request an additional contract team member to assist with the ongoing management of the intranet. This would then free up the intranet manager to focus on the identified activities, as well as the longer-term initiatives.

While the extremely limited resources made it hard to fully work through all the steps of the 6x2 methodology, an executive briefing was created. This was well received by the intranet sponsor, and used to communicate to key stakeholders.

From there, it was simply a process of working through each of the items identified for the coming six months. In many ways, this is the easiest phase of the project, as each item is concrete and time can be spent fruitfully on the details of making it all come together.

A final word on delivering successful intranets

While there are challenges and roadblocks confronting intranet teams, these are not insurmountable. Great progress has already been made, and intranets are now recognised as a key part of most organisations.

The 6x2 methodology outlined in this report is designed to help intranet teams take their intranets forward into the future, to position their intranets not just as a platform for information or communication, but as a strategic 'business tools'.

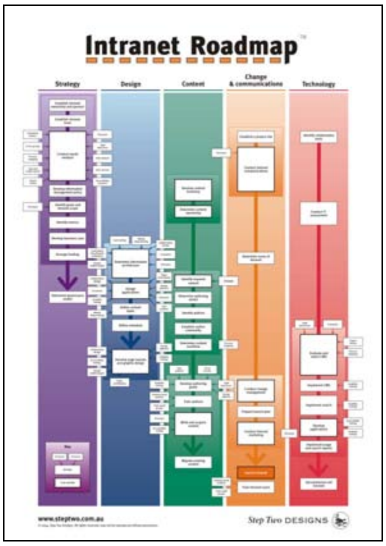
The 6x2 approach is very pragmatic and practical, and scales from the smallest organisations to multinationals. In all cases, it should help intranet teams to focus on what they can deliver, and to guide the selection of activities that will have the greatest impact.

Use this methodology to simplify and improve planning activities, and to put in place a sustainable and ongoing process for enhancing your intranet.

Whether re-starting intranet processes or building on an already successful approach, intranet teams can take concrete steps to deliver an even better site. We therefore encourage intranet teams to focus on the here-and-now, and to ask: what can we deliver that will support the organisation and help staff to do their jobs?

Other Step Two Designs products

Intranet Roadmap™



The Intranet Roadmap™ provides the first truly comprehensive methodology that describes all the activities required to develop (or redevelop) an intranet.

Beyond just implementing software or redesigning the site, the Intranet Roadmap covers activities in five key streams:

- strategy
- design
- content
- change and communications
- technology

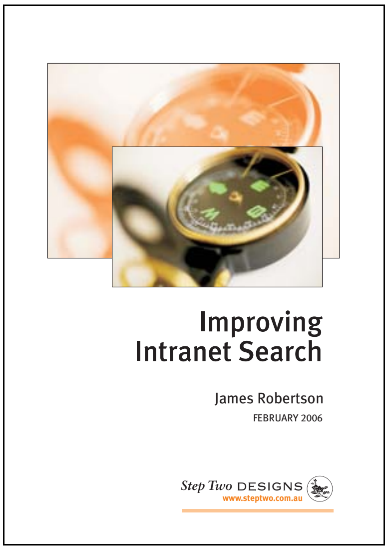
This is a holistic approach to an intranet project, ensuring that all the activities required for a successful launch (or relaunch) are addressed.

For more information:
www.steptwo.com.au/products/roadmap

" The folks at Step Two Designs have released an excellent resource for those involved in the planning, creation, maintenance, and implementation of corporate intranets. It's called the Intranet Roadmap and includes a brief, quick-read 54-page guide to developing an intranet strategy, designing a framework, developing content, managing change, evaluating technology and tools, and selecting techniques that will address your organizational issues. It's one of the best resources available for intranet professionals to date! "

Improving Intranet Search

Poor search is one of the greatest sources of user frustration with intranets. Worse yet, the inadequacies of search may be consigning the intranet as a whole to failure. If staff can't find information on the intranet when they need it, will they even come to the site?

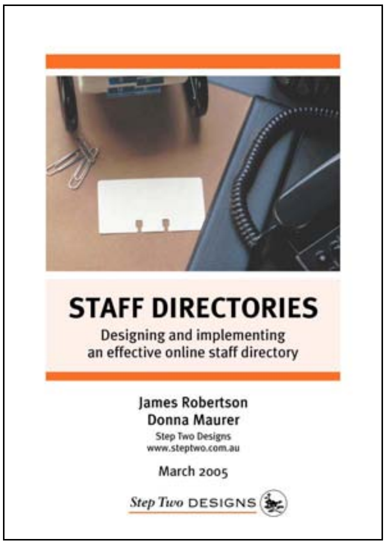


This report provides a practical methodology for improving intranet search, including a wide range of guidelines and approaches that cover every aspect of the search solution. All of the recommendations are designed to be within the reach of every intranet team, and do not require in-depth technical knowledge or unlimited budgets.

For more information:
www.steptwo.com.au/products/search

" Improving Intranet Search demystifies search, making it truly achievable. Overworked intranet managers will discover how a few hours a week – well spent – can improve the user experience dramatically. New intranet managers, still learning on the job, will find it to be a fast track to understanding what search is, what users want, and how to meet their needs. Intranet managers with low budgets will discover numerous tips on how to improve search without spending money. "

Staff Directories report



Also known as phone directories, phone lists and corporate whitepages, "staff directories" are almost always the most-used feature of corporate intranets. More than any other tool, they are used every day throughout the organisation, and as such, can deliver considerable cost savings and productivity gains.

Staff directories can be much more than just a list of names and phone numbers. They can capture organisational structure, locations, photos, skills and expertise, projects, blogs and much more.

Like any tool, however, staff directories must be carefully designed to be effective and usable. This "better practice" report is designed to capture the experience gained across dozens of organisations to give you clear and practical ideas on how to design, implement and maintain your staff directory.

For more information:
www.steptwo.com.au/products/staffdirectories

" The staff directory, the corporate intranet's quiet workhorse, plays a far more strategic role than most realise. Thanks to this excellent report by Step Two, the staff directory finally receives the recognition that's been long overdue. Step Two's report provides a serious and much-needed examination of staff directory characteristics, usage and design. This report maps out dozens of potential practical improvements that can enable enlightened organisations to derive even greater value from their staff directories. "

Content Management Requirements Toolkit

The Content Management Requirements Toolkit provides a comprehensive starting point for identifying the business and technical requirements that will drive your selection process.

The Requirements Toolkit contains 133 fully-developed CMS requirements, across five main categories. These are ready to be cut-and-pasted into your content management tender, saving days of effort and ensuring that nothing is missed.

The first version of the Toolkit has been used by organisations the world over, from Fortune 500 companies to small businesses. This new version builds upon these successes, and delivers even greater value.

For more information:
www.steptwo.com.au/products/toolkit

" As the content management tools and processes become increasingly complex, it's become incredibly hard to know how to evaluate and select the right CMS. That's why all content managers need Step Two's indispensable Toolkit; it's an incredibly useful package of practical guidance, helpful directions, and supporting theory that will lead to better RFPs and ultimately more successful authors and content managers. "

Intranet Review Toolkit


Intranet review toolkit

{Insert organisation / intranet name}

Review conducted by: {insert your name}

Date of intranet review: {insert date}

Version of intranet review toolkit: 1.0 (December 2005)

Step Two DESIGNS

Toolkit produced by **Step Two Designs** (www.steptwo.com.au)

The Information Architecture Institute

Supported through an **IA Institute Progress Grant** (www.iainstitute.org)

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This intranet review toolkit provides intranet managers and designers with an easy-to-use method of assessing the strengths and weaknesses of their intranet. It contains a substantial set of heuristics, allowing a detailed intranet review to be conducted that focuses on a wide range of functionality, design and strategy.

The intranet review toolkit has been published under a Creative Commons license, allowing it to be freely downloaded and used. The heuristics are based on identified best practices in intranet and website design, providing a sound basis for the review. Additional references are included as an appendix to the document.

Free download:
www.IntranetReviewToolkit.org

Intranet Leadership Forum

Introducing the Intranet Leadership Forum: a professional community for intranet managers and teams in Australia and New Zealand.

Successful intranet teams have key skills in a variety of disciplines: strategy, project management, content management, communications, content writing, information architecture, usability, influencing, and stakeholder management to name a few.

The challenge for intranet teams, however, is that learning is usually on the job. While attending conferences can contribute to professional development, they offer limited skill building and practical insights. Beyond this, intranet team members often have few opportunities to connect with their peers in other organisations and cannot, by definition, see other intranet sites.

That's where the Intranet Leadership Forum comes in.

The Forum provides support to intranet teams. Joining the Forum will connect you with other intranet professionals who are tackling similar intranet projects and issues. You'll be part of a community where you can share your experiences, helping to bridge gaps in knowledge and expertise.

You will have access to real-life solutions for your organisation's intranet issues from peers who have already found the answers, saving your organisation time and money.

Your annual membership gives you year round access to:

- Three facilitated ½ day workshops with the topics selected by members.
- Annual two-day intensive workshop that covers the latest techniques and best thinking on intranet strategy, design, management and technology.
- Members-only website with member profiles and activities, screen shots of other member intranets, and more
- "How-to" guides on intranet techniques such as card sorting, selecting a content management system and intranet planning.
- Monthly newsletter with the latest resources and forum activities.
- Members-only email list to allow you to ask questions of all members.
- Full-time dedicated forum manager, Catherine Grenfell.

For more information on the Intranet Leadership Forum, visit: *www.intranetleadership.com.au*