Briefing
INTRANET X.0 - TAKING A STRATEGIC APPROACH TO MODERNIZING YOUR INTRANET

TODD RAY
TECHNOLOGY BUSINESS STRATEGIST
toddray@alumni.stanford.edu

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EXECUTIVE SUMMARY
Organizations wishing to expand, modernize and/or upgrade their intranet/portal(s) typically have a number of choices to make when it comes to services offered, functionality provided, UX focus, delivery mechanism(s), phasing, budget etc. For this reason, leading organizations need to consider the development of an “Intranet X.0 Strategic Plan” prior to making further investments.

This paper highlights the rationale for this type of planning and presents a “10 Step Strategic Planning Model for Intranets” - a prescriptive methodology used to demystify/simplify strategic planning in this area. For reference, the Appendix also provides a number of intranet/UX best practices and trends for consideration when developing your future strategy.

INTRODUCTION
Designers, architects and developers work closely with corporate communications, IT, and other departments to plan/design/build their next-generation corporate portals, often based on Microsoft’s SharePoint 13 (and/or Office 365) platform.

Working in coordination with these stakeholders and other business/corp functions, many of our customers also wish to develop a strategic plan to better leverage their investments in the underlying platform by:

(a) expanding the intranet services/offerings provided
(b) adding capabilities/features compliant with modern, best-of-breed intranets
(c) improving service management and governance
(d) migrating additional, content and applications to it, and
(e) investing in more proactive adoption-related functions.

This sort of “Intranet X.0 Strategic Plan” needs to incorporate inputs from various stakeholder groups and provide guidance, timelines and resource needs for specific recommended changes over time. This includes not only the technical/functional elements of the expanded intranet function, but management aspects as well, including governance, business alignment, service management, and CMT&C (change management, training and communications). Since current intranet (and other) content will often need to be rationalized and then moved/migrated to the next gen intranet (Intranet X.0), specific plans to approach this area are needed as well.

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1 See Appendix A: Re-thinking Portal Designs for Modern Workstyles
2 We will use the term “X.0” as a placeholder to represent the notion of an expanded intranet in its future state
In short, leading organizations need to invest in envisioning the future state of their "Intranet X.0", provide a specific plan of action to build it out and manage it over time (including activities, timing, resource requirements, and budget), and execute against the plan.

At a business level, the need for this sort of strategic planning activity is highlighted in Figure 1, below.

**Figure 1 - Why Invest in an Intranet Strategy?**

<table>
<thead>
<tr>
<th>Why Invest in Intranet Strategic Planning?</th>
<th>Shifts focus to business needs vs. technology fulfillment</th>
<th>Definitions capabilities and service offerings required to meet business needs</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Better Customer Focus</td>
<td>Business and Region-focused Service Delivery</td>
</tr>
<tr>
<td></td>
<td>Defines the right level of service management, governance &amp; adoption req'd to meet user needs</td>
<td>Defines the right metrics and instrumentation to showcase value and ROA</td>
</tr>
<tr>
<td></td>
<td>Balanced Governance &amp; Enablement</td>
<td>Value Realization</td>
</tr>
</tbody>
</table>

With this as background, this paper outlines the basic steps and further rationale for taking a strategic approach to modernizing your intranet/portal.

**APPROACH**

An overall, step-by-step strategic planning approach for intranets - typically applied via an “Intranet X.0 Envisioning, Strategy and Planning (ESP)”-type engagement - is shown in Figure 2 and described below. Specific activities for each step are provided in the next section.
Envisioning (& Discovery). Following the Strategic Planning Model for Intranets applied to the customer’s objectives, a typical ESP engagement will start with the following activity streams (numbers correspond to those in the above diagram).

1. **Focus Area Identification/validation.** Work with customer leads to confirm (and validate) focus areas identified prior to the engagement and included in the detailed scope for the ESP engagement.

For example, a given customer may have articulated interest in defining the path forward for the following four critical areas prior to the engagement:

- **Intranet Functionality/UX Enhancements** (includes current/future state assessment/prescription of capabilities, features, services, technical delivery, etc.)
- **Governance and Management** (includes current/future state assessment/prescription of oversight structure, operational roles and responsibilities, operating model, business alignment and enablement, policies and procedures, etc.)
- **Migration** (mapping of current content repository future intranet, migration method strategy, migration service definition, etc.)
- **Adoption and Value Realization** (future state prescription of CMT&C (change management, training and communication), measurement/reporting and communication of value.)
Based on the selection/validation of these types of focus areas, additional Envisioning work will then take place, including (with reference to the numbering in the above diagram):

2. **Stakeholders and Needs.** Starts with identifying overall business and technical needs from major stakeholders and documentation of any known over-arching business/technical drivers influencing the path forward.

For example, we worked with a major US Bank whose overarching IT transformation strategy dictated the following, which cascaded down to the intranet team’s approach moving forward and the work they needed to do to align with the overall mandate:

**Figure 3 - Example IT Transformation Objectives**

Once this was done, the individual focus area/workstreams were mapped to the overarching objectives as shown in Figure 4 below.
Figure 4 - Example Focus Area/Workstream Mapping

Strategic Workstreams

Also includes identifying stakeholders specific to each focus area identified in Step 1 and staging education/discovery work (virtual and face-to-face workshops/meetings/interviews) with them using structured methods targeted to each focus area.

Note that stakeholder engagement activities need to address the program objectives but also be constrained by the level of effort required, time allowance and required outcomes. This would typically be outlined in a simple “Stakeholder Engagement Plan”.

This step would also involve reviewing any previous user profiling/persona development work performed prior to the ESP engagement and identifying any additional persona development work required moving forward (but not include, as part of the strategic development work, any detailed persona development beyond rough identification).

3. Current/Future State Assessments. Documents the current state relative to each focus area and identifies, based on documented stakeholder requirements and overarching business/technical needs (identified in Step 2), needed progression towards a desired future state, often using maturity/progression models to visualize/plot the desired change. At this point, additional methods may be employed to highlight how making the highlighted

---

3 Some stakeholders may provide inputs across multiple areas
4 Example 1: for the focus area “Expansion of Intranet Service Offerings”, presentation of a strawman set of future offerings and baseline capabilities upon which stakeholder feedback/requirements/input can be layered. Example 2: use of visual reference models and structured questions related to assessment via a governance maturity model.
change(s) would ultimately address overarching business and technical requirements identified in Step 2 (ensures alignment).

An example high level (roll-up) output of such an assessment is provided in Figure 5, below, adapted from the deliverable set from the bank example highlighted above.

**Figure 5 - Example Strategic Progression Model**

Note that each of the dimensions in the above diagram has an underlying progression model that the current/future-state plot is based on. For example, a more detailed progression model for “Service Offerings and Capabilities” is shown in Figure 6, below.
It is important to note that although this shows a step-wise progression, this does not attempt to explain HOW the work will be done, in what timeframe, and which resources are required, all of which is done in later steps.

4. Vision and Objectives. Using the collective input from Steps 1-3, establish the overall vision and objectives (typically in narrative form), highlighting the needed step-wise progression from the current state to the desired future state.

An example high level intranet vision for a large, global organization is provided below for reference:

*<Intranet name>* is about *Employee Enablement*. Having satisfied, informed and productive employees is key to the success of *<customer name>*. and engaging/enabling these employees with modern means of communication and collaboration via *<intranet name>* continues to be an important investment area.
The overall opportunity here is to improve and modernize the user experience of the current <intranet name> with <intranet name X.0) based on an upgrade of the current underlying platform (<platform name>). Specific elements to highlight are listed below.

- Leverage new platform capabilities
  - provided by <product name>
- Improve the current user experience
  - with more modern interface and accessibility features (e.g. in the area of mobile access to content and social feeds)
- Integrate enhanced 'social" features
  - Utilized by other leading Microsoft customers.

**Vision:** deliver a fully baked communication and collaboration platform that addresses current functional and infrastructure needs on top of the latest version of the underlying platform, providing world class, mobile accessible and easy-to-learn/use capabilities that map to the following objective areas:

- **Employee Engagement.** Enable corporate functions and business units to better communicate with and get feedback from employees. Make it easy for content publishers to deliver compelling and fresh content (and rich media) to multiple target end-points. Enable employees to better connect with one another and their organizations.

- **Employee Productivity.** Enable employees to better find and communicate/collaborate with people and information critical to getting their jobs done, both within team and portal sites as well as individually.

- **Business Agility.** Provide business users with a means to easily create and maintain line-of-business (LOB) applications including forms, data, workflow, and other functionality.

- **Quality Delivery Management.** Provide <intranet name> capabilities using best-of-breed delivery management, operations and governance practices.

To provide these capabilities, <intranet name> will be based on an easier to manage infrastructure and delivered through multiple, well-defined (and governed) service offerings, including a "<customer name> Business Platform" that allows business units to develop and host applications utilizing a well-governed set of established (and well-governed) building blocks built on top of the core X.0 platform.

At a more detailed level, organizations looking at more than one major focus area/workstream may develop a more granular set of vision/objectives for each. An organization may also have established either coarse or more granular vision/objectives.
during project framing, so some of this may be re-used from previous activities and just need to be validated/updated.

5. Goals and Metrics. Building on Step 4 (and critical for Step 9), establishing specific goals and measures/KPIs for the desired future state is critical to eventual establishment of the business case (relative to the goals) and eventual measurement, reporting and communication of value.

For example, if the goals include: “Increase employee satisfaction”, “Increase employee productivity”, “Increase knowledge production, sharing and retention”, and “Increase ideation, innovation and commercialization of new products”, KPIs for each of these should be laid out, including benchmarks to compare future measurements to.

Figure 7, below, provides a high level treatment of how you can tie the use of technology to business performance impacts, for reference:

**Figure 7 - Example Information Worker Technology Impact Model**

(Trade-offs & Strategy).

The “Strategy” phase of the ESP project entails taking inputs from the Envisioning phase, developing and evaluating alternative courses of action to address the desired future state, and making recommendations. This critical step provides crucial input for the next phase, “Planning”, where the roadmap and execution plan are formulated, including the business case and communications plan.
6. **Alternatives Assessment.** Based on the defined future state, there may be alternative, feasible courses of action to achieve the stated goals and objectives that need to be rationalized.

In a simple example, if an organization determines in Envisioning that they wish to expand their intranet service offerings beyond a current top level corporate portal (say, based on SharePoint 13) to include additional service offerings such as collaboration/team sites, project sites and personal sites, with social embedded throughout, there may be a number of high level alternatives for delivery of each respective offering, including vendors, product versions, modes of delivery (on-prem, cloud, hybrid) and operations/management sourcing (in house, managed service provider, other internal service provider organization, etc.).

There will obviously be a number of things to consider and document in this step, which enables the trade-off analysis, decisions and recommendations made in Step 7.

7. **Decisions and Recommendations.** Based on the alternatives identified in Step 6, Step 7 involves review, final trade-off analysis and decision making as to the path forward. This is where high level determinations like dependencies, prioritization, approaches, phasing plans, “big-bang” vs. agile, are made.

For example, one recommendation made here could be that portal sites, “special controls” (typically high security, ring-fenced sites for things like M&A activity) and custom apps need to be delivered from on-prem, and team/project-type collaboration sites will be cloud-based.

**Planning.**

The Planning phase is where all the inputs/findings, decisions and recommendations from previous work are translated to actionable roadmaps and execution plans. In addition, high level cost estimates and benefits assessments may be required for budgeting/justification purposes, depending on governance. Finally, all of this needs to be communicated to leadership, and buy-in/ownership needs to be vigorously pursued to ensure proper execution down the road.
Figure 9 - Steps 8-10

8. Roadmap and Execution Plan. The level of granularity needed in roadmapping and execution plan exercises will vary according to intended audience, level of knowledge/certainty (improved greatly if Steps 1-7 are vigorously pursued), and required time horizon. Roadmaps and accompanying high level execution plans should be distinguished from a detailed project plan in that their purpose is to communicate – at the appropriate level of granularity (see previous comment) – the required workstreams, next level activities, broad-brush timing, sequencing and rough resource requirements. Along with the Business Case, which is sometimes required, well done roadmaps enable program budget approvals and serve to get the program/project stakeholder entities aligned on the go-forward plan.

A high level roadmap (i.e. executive view) from the previous bank example is shown in Figure 10 below. In this case, each of the dimensions comprised go-forward workstreams, each of which had their own sub-roadmaps, additional planning requirement specifications, and execution plans (not shown, but an example template is available upon request).

Note that, in this case, the customer wanted different levels of granularity for year 1 vs. longer term, with the variable length light blue bars representing Year 1 duration. Specific execution plan dashboards, additional planning requirements and execution plan details/roadmaps would typically be provided as part of this type of work for each identified workstream/focus area.
9. Business Case. Given that strategies, roadmaps and execution plans are typically developed only for large, complex, enterprise initiatives, there will obviously be cost/budget considerations as well as the question of benefits and ROI. For this reason, a business case is often required, which can vary from qualitative and super high-level (e.g. see Figure 4) to robust (e.g. 2-3 month business case development efforts we’ve done for other customers).

For many projects, a simple business case tying workstream direction to IT/business objectives will likely suffice, and further work can be identified and put into a future “Business Alignment” or “Value” workstream if needed (i.e. would be called out in the roadmap/deliverables).

10. Communication & Buy-In. While it may seem rather obvious, it is important to underscore that the ESP output needs to be communicated to leadership and other select stakeholders/groups to get buy-in and commitment/ownership moving forward. This typically requires successive roll-ups of the envisioning, strategy (e.g. recommendations) and planning artifacts (e.g. roadmaps) into audience-specific formats, including that appropriate for executive consumption.

This may include an uber high level view such as that shown in Figure 11, below, from the previously highlighted bank example.

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### Figure 10 - Example High Level Roadmap

<table>
<thead>
<tr>
<th>See Recommendation</th>
<th>Near Term (Year 1)</th>
<th>Longer Term</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>SP Business Strategy Communication</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Business Engagement</strong></td>
<td>Development → Execution</td>
<td>Ongoing business input Assess &amp; measure Continuous improvement</td>
</tr>
<tr>
<td><strong>Service-Oriented</strong></td>
<td>Service Architecture &amp; Management Plan</td>
<td>Development → Phase 1 Execution</td>
</tr>
<tr>
<td><strong>Bus. &amp; Tech. Svcs Arch.</strong></td>
<td></td>
<td>See “Service Orientation”/Recommendation 3</td>
</tr>
<tr>
<td><strong>SP Governance Model</strong></td>
<td></td>
<td>See “Service Orientation”/Recommendation 3</td>
</tr>
<tr>
<td><strong>Svc Offerings and Capabilities</strong></td>
<td>Expand Business Service Offerings Applied to Planned Capability Release Schedule</td>
<td>Future service offerings and capabilities per business demand and available resources</td>
</tr>
<tr>
<td><strong>Business Enablement and Adoption</strong></td>
<td>SP Adoption Plan</td>
<td>Development → Phase 1 Execution</td>
</tr>
<tr>
<td><strong>Value-Oriented</strong></td>
<td>SP Business Case and Measurement Plan</td>
<td>Development → Communication</td>
</tr>
</tbody>
</table>

1. Includes Governance 2. Work in Progress – Customer SharePoint team
**Figure 11 - Example Business Recommendations Summary**

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Strategy and Business alignment</td>
<td>Intranet Strategy Business alignment Value</td>
<td>Communicate strategy to IT and business leadership</td>
<td>Evolve offerings based on learnings from further business engagement</td>
</tr>
<tr>
<td></td>
<td>End-user enablement Value focus</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Service Architecture and Management</td>
<td>Adopt modern notions of service management to align with business</td>
<td>Service Offerings and Capabilities</td>
<td>Develop new offerings mapping to business needs</td>
<td>Business Enablement and Adoption</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Help users learn and adopt offerings for business value</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Value</td>
<td>Showcase high value use cases and communicate benefits to IT and business leads</td>
<td></td>
</tr>
</tbody>
</table>

**SPECIFIC ACTIVITIES, DELIVERABLES AND TIMING**

**Activities.**

A high level list of activities related to the 10 step strategic planning methodology (presented in the previous section) is provided in the following table.

In general, Envisioning activities (Steps 1-5) take place in the early/middle stages of the strategic planning process, and strategy/recommendations are made starting late in Envisioning and for a short period prior to more intensive planning and final deliverable preparation/communication.
<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>Activities</th>
</tr>
</thead>
</table>
| **General**                 | General project management, kickoff/status meetings, etc.                    | 1. Project management/coordination  
2. Kickoff meeting  
3. Status meetings  
4. Presentation of findings/deliverables |
| **1. Focus Area Identification** | Validation of focus areas that need to be addressed in strategic planning | Work with project sponsors and principal stakeholders to clarify/validate focus areas such as (examples):  
- Service offerings  
- Intranet functionality  
- UX enhancements  
- Governance and management  
- Migration  
- Adoption and value realization |
| **2. Stakeholders and Needs** | Business, technical and end-user requirements/ needs for focus areas (i.e. Voice of the Customer) | 1. Identify business/technical stakeholders  
2. Interview/engage with business/technical stakeholders  
3. Review and discuss provided technical/organizational baseline documentation  
4. Review existing user profiles/personas (if available) and identify additional development needs  
5. Document findings |
| **3. Current/ Future State** | Collection/ analysis of current state data against reference models & future state plotting | 1. Map current/future state data (from stakeholder interviews and documents provided by customer) onto reference and progression models for each focus area  
2. Develop current/future state rollup graphics and summary dashboards |
| **4. Vision and Objectives** | High level vision and objectives reflecting desired future state change | 1. Document business drivers and requirements based on information provided and interviews with stakeholders  
2. Develop/revise vision and objectives based on information provided and interviews with stakeholders |
### Step 5. Goals and Metrics

**Description:** Specific list of things that need to be accomplished with KPIs for each

**Activities:** Closely related to #4, document/develop specific qualitative and quantitative benefit categories and any relevant metrics for each

### Step 6. Alternatives Assessment

**Description:** Analysis of different courses of action to accomplish future state/ vision

**Activities:**
1. Develop options to fulfill what’s needed for each focus area.
2. Assess needed workstream progression and alternatives in terms of efficacy/outcome, timing, cost, complexity, risk, etc.

### Step 7. Decisions and Recommendations

**Description:** Determination of path forward based on alternatives and options, including recommended course of action/ direction that was decided on

**Activities:**
1. Based on output from #6, develop strawman recommendations
2. Review recommendations with project leads/key stakeholders.
3. Revise and finalize recommendations based on input.

### Step 8. Roadmap and Execution Plan

**Description:** Tactics, timing and level of effort estimation for each focus area element

**Activities:** Based on the recommendations and strategy (developed in #6 and 7), develop detailed workstreams, activities, timelines and resource estimates for each focus area

### Step 9. Business Case

**Description:** Costs and benefits of recommended course of action

**Activities:**
1. Develop rough cost estimate for each focus area/workstream defined in #8
2. Align benefits with vision/objectives/goals/metric (defined in #4 and 5)
3. Develop business case documentation (high level)

### Step 10. Communication and Buy-In

**Description:** Communication, buy-in and assignment of ownership to execute

**Activities:**
1. Develop communication plan
2. Preparation of final deliverable and presentation
3. Final deliverable presentation

### Deliverables

The following deliverables would typically be provided as part of an ESP engagement. The relative timing of each is shown at the bottom of Figure 12 in the next section.

- Project Plan
- Weekly Status Reports
- Envisioning Brief
Timing
For reference, the rough layout of the 10 steps process carried out over a 12 week period is shown on the timeline below. Depending on the number of focus areas, stakeholders, level of treatment required, budget and timing, an ESP-type engagement could take more or less time.

*Figure 12 - 12 Week Timeline*

<table>
<thead>
<tr>
<th>Month 1</th>
<th>Month 2</th>
<th>Month 3</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Kickoff</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Focus Area Identification</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Stakeholders and Needs</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Current/Future State</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Vision &amp; Objectives</td>
<td>Vision &amp; Objectives</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Goals and Metrics</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Alternatives Assessment</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Decisions and Recommendations</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Roadmap and Execution Plan</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Business Case</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Communication and Buy-In</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Close-out</td>
<td></td>
</tr>
</tbody>
</table>

### Envisioning (& Discovery)
- Kick-off meeting
- Detailed project plan
- Focus area definition
- Stakeholder engagement plan
- Weekly status

### Trade-offs and Strategy
- Weekly status
- Stakeholder meeting documentation
- Reference models
- Progression models
- Document of Vision, Objectives, Goals and Metrics

### Planning
- Weekly status
- Documentation of alternatives assessment and decisions and recommendations
- Communication plan
- Final report and presentation

Work Completed/ Deliverables
APPENDIX A – RE-THINKING PORTAL DESIGNS FOR MODERN WORKSTYLES

Introduction

When it comes to the enterprise digital landscape, the business, technical and end-user context is constantly evolving. This includes where, how, with whom, and on which devices your employees, customers, suppliers and partners work.

This means that the software applications used by your constituents need to be continuously adapted as well.

This warrants that firms take a closer look at existing solutions like enterprise intranets/portals on a more frequent basis and more rapidly align them to best practices as well as changing end user needs and workstyles.

Organizations should also be thinking about making their solution portfolio (and delivery models) flexible enough to adapt to anticipated future trends.

Extending these themes, this section provides a level set on best practices as well as trends and provides a glimpse into the future.

Properties of Modern Intranets

A point of view on the key elements of a next generation or “Modern Intranet” is provided in the graphic below, highlighting those properties we consider most important to consider when assessing the current state of a portal/intranet solution.
UX Design principles
Extending this a bit further, we recommend that organizations closely follow a set of “UX Design Principles” during intranet project execution, provided below.

- **Consistency, Standards and Affordances.** Users should be presented with a consistent use of words, situations, and actions throughout the experience and should not have to wonder whether different words, situations, or actions mean the same thing. Platform conventions should be followed. Experience functions should be shown in a way that is intuitive for the user to understand and follow standardized web design conventions.

- **Match Between Experience and Real World.** The experience should speak the users’ language, with words, phrases, and concepts familiar to the user, rather than system-oriented terms

- **Minimal Content Design and Progressive Disclosure.** Dialogues should contain information that is relevant and necessary. Every extra unit of information in a dialogue competes with the relevant units of information and diminishes their relative visibility. Experiences should provide information as it is needed, in a logical order, and not overload the user unnecessarily with information.

- **Intuitive Information Architecture and Navigation.** The experience should organize and label content to support usability. Navigation should facilitate uncomplicated access to areas of the experience through multiple paths.

- **Brand Standards Compliance.** The experience should comply with current UNDP brand standards.

- **Personalization.** If possible, information should be personalized for the user based on audience targeting to display more relevant information. Role, location, previous use of the tool, active directory or other system data could be utilized to refine and personalize information displayed to the user.

- **Visibility.** The experience should clearly display the user’s location within the experience, as well as in relation to other areas of the experience. The experience should also keep users informed about what is going on through appropriate feedback within reasonable time.

- **Mobile Optimization.** Consider the appropriate level of mobile optimization and future mobile accessibility. Mobile first, mobile optimized views or mobile accessible approaches.

- **Crawl, Walk, Run.** Create the architectural base for the system to become more sophisticated in the future. Enhanced personalization, views of content, reporting and governance. Define current scope that is achievable to build within the available time and resources as well as future roadmap.

- **Creative Solution with Technical Validation.** Creatively solve for the user and business needs with technical validation of the solution.
Additional Best Practices

**Strategy.** Great strategic planning makes sure the right bets are made, the right level of funding is provided, and things are orchestrated in a rational manner across a portfolio of initiatives. This becomes even more important moving into 2014, as the landscape articulated above becomes more complex and the opportunities for value production greater.

**Execution.** Great execution means that you put all the right pieces in place at the right time to make your initiative successful over what typically amounts to fairly long periods of time in the intranet/portal space.

This starts by developing the right strategy and relies on ample planning, architecture and design followed by development, rollout and progressive management, communication, business enablement and measurement.

**Operating model.** We define the “operating model” to include everything related to the delivery of intranet/portal capabilities to end-users. This includes the organizational functions, business engagement model, services provided, service management, service architecture, technical change management, governance and funding.

This is a critical thing to get right for the ongoing success of your portal/intranet initiative.

**Change Management, Training and Communication.** Also known as “CMT&C”, this can be owned by multiple parties, including IT, the PMO, Comms/HR, and various business roles, depending on governance and organizational structures.

Depending on the nature of the effort, investment in this area can be critical to the adoption of your portal/intranet initiative.

**Value Realization.** Having a value measurement and reporting program in place is akin to having a “business plan” written for a business (or business unit). This involves defining the right set of metrics aligning to business priorities as well as the mechanisms to tie usage scenarios by different personas to an “Impact Space”.

- Ongoing measurement and reporting against this sort of scheme can also be critical to the success of your portal/intranet initiative moving into 2014.
Intranet Trends and Futures

TRENDS

A recent article (December 2013) - Intranets in 2014 - summarized intranet trends from a number of recent studies by Jakob Nielsen and others towards the end of 2013.

An updated list of high level intranet trends here in mid-late 2014 from 3rd party research and customer experience is listed below. This represents a synthesis of what we see happening at a broad scale right now in the world of intranets (and related technologies).

1. ENTER THE SOMO GENERATION.

   • **SoMo (Social/Mobile).** Pretty much everyone in business these days is SoMo (social/mobile) - consuming and/or interacting with information differently than 10 years ago (e.g. at different times, on different devices, in a more social manner), requiring a re-thinking of intranet sites, apps, content and usage expectations.

   • **Impact of “Full-Plate Syndrome”.** Users with limited bandwidth (time) during the day are increasingly challenged when it comes to finding time to navigate to portal and social environments (at least while at work in front of their desktop).

   • **Emergence of “Casual Computing”.** Evolving scenario: workers are interacting with enterprise systems more and more via external/mobile access modes during downtime (e.g., standing in line for the bus, coffee before/during work, at lunch etc.).

2. BYOD 2.0: MOBILE BECOMING A REALITY, WITH RENEWED PRESSURE FROM THE CONSUMER SIDE.

   • **Enterprise Ready.** At the top of everyone’s list but perennially challenged, “Mobile” is continuing to come out of its shell, with organizations finally figuring out the right mobile strategies aligned with business and technical needs across different mobile personas, device types and intranet applications.

   • **Managed Security.** Security remains a concern but technical mitigations prevalent

   • **Continued CoIT Pressures.** Modes of mobile access to information continue to expand with new types of end-point devices emerging from the consumer space (see Futures)

3. BIG TENT SOCIAL

   • **Imbedded Social.** Social is moving out of the "hype" state and into a more reasoned part of the communication and collaboration portfolio - as standalone
enterprise social networks (ESNs) continue to search for a purpose, social stays valid via pervasive incorporation into various content, communication, collaboration and application environments.

- **Balanced governance.** Organizations continue to grapple with and mitigate concerns over open communication vs. compliance risk.

- **Social Moves On.** Organizations continue to leverage learnings from past failures and are re-thinking their social strategies as we start gravitating towards a “post-social” world (see Futures section).

4. **EMERGENCE OF DATA VISUALIZATION AND ANALYTICS**

- **Real-time data-viz.** User expectations about access to real-time data in their intranet environments is on the rise, putting demand on corresponding publishing, integration and delivery systems. For users, information about the environments they’re working in (e.g. who’s there and what are they doing?) will become increasingly important. (See Futures section).

- **Data -> Information...Insights?** Increased emphasis on information rich infographics and data visualization appeal to those looking for the summary view but have the potential downside of dumbing down complex information sets required for proper decision making.

- **Evolution through analytics.** For administrators, analytics will start playing more of a role in understanding internal usage patterns and adjusting information worker (IW)-focused capabilities accordingly.

5. **ENTERPRISE ADHD, INFORMATION OVERLOAD, APPLICATION AND CONTENT DYNAMICS**

- **Minimalist Apps and Content.** Organizations continue to grapple with how to adjust their application and content strategies to increasingly short attention span behaviors coupled with information overload, i.e., adjusting application and content strategies to workers accustomed to numerous, minimalist, small-function applications on their consumer mobile devices, as well as to pre-digested sound bites, top 10 lists, infotainment, etc.

- **New content experiences via aggregation and personalization.** Net new content, delivery vehicles and interactive expectations continue to overwhelm certain subsets of the user base, potentially resulting in avoidance behavior altogether unless creative ways are utilized to target information to different user types. Past visions for personalization and aggregation (driven by information overload and end-user fragmentation) are now becoming reality as the role of search changes to that of a content provider/aggregator. Search evolves to more
of a suggestion-engine and content-surfacing function. Moving into 2014, for example, Office 365 will be providing the Delve social/content aggregation function.

6.  ADAPTING TO “MODERN WORKSTYLES” THROUGH “RESPONSIVE LISTENING”

- **Modern Workstyles.** Organizations will need to double down on their end-user focus and adapt their solutions to new workstyles (and the other dynamics listed above), as users of enterprise applications will increasingly have choices as to where, when and on which device they interact with information provided to them (or by them).

- **Responsive Listening.** Providers of devices, applications and services will need to maintain an even closer connection to the user base as well as technology trends over time and use real-time feedback and analytics to assess efficacy, constantly tuning what’s provided to improve productivity, increase innovation and drive value. *(if they don't, expect pervasive “switching behavior” to other providers)*

FUTURES

1. ENTER THE “HYPER-INTERACTIVE”, “POST-SOCIAL” WORLD.

- **The UX Dilemma.** Capturing the limited mindshare of a “full plate syndrome” user base will remain a challenge, requiring (on one hand) renewed investment in highly interactive, even “Hyper-Interactive” applications driven by social and other streams of new content, data and insights balanced with (on the other hand) minimalist UX designs and alternative access modes (responsive designs for mobile, as well as native applications).

- **Contextual Awareness.** More will be going on within interfaces that provide: (a) information about what’s going on in the environment (e.g. who’s there and what are they doing, top posts, top contributors, etc.); and (b) alerts as to what users need to focus on next.

  - Note: (a) will require higher degrees of integration and state reflection than typically provided today in intranet (and other IW-focused) applications.

- **“Post Social”**. In the meantime, the hype around the term “social” will subside in the next few years, and a “Post-Social” world will result, whereby dynamic information about people and their relationships with other people (and the information they interact with) will be commonplace and just expected, vs. being called out explicitly as “social features”.
2. BROAD-FIELD C3SC\(^5\) INNOVATION THROUGH NUI\(^6\) AND GESTURE-BASED COMPUTING

Hardware/software innovation drives new collaboration scenarios - e.g. larger, multi-function, sensory screen (e.g. Microsoft’s Perceptive Pixel + Kinect technologies), device pairings (e.g. Microsoft’s Surface 3 and Lumia 830), etc. For the foreseeable future, usage scenarios and applications playing catch-up to the hardware and native device software. Niche players rule the application ecosystem.

3. NEAR-FIELD C3SC INNOVATION VIA WEARABLES AND IOT

“Internet of Things” (IoT)-driven decentralization of collaborative signals, functions and inputs (i.e. information inputs and outputs increase reach to the periphery (i.e. beyond phones) into wearables, etc. (watches, glasses, etc.), with (again) scenarios and applications needing to play catch-up to the hardware. Niche players rule the application ecosystem.

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\(^5\) Communication, Collaboration, Content and Social Computing

\(^6\) Natural user interfaces