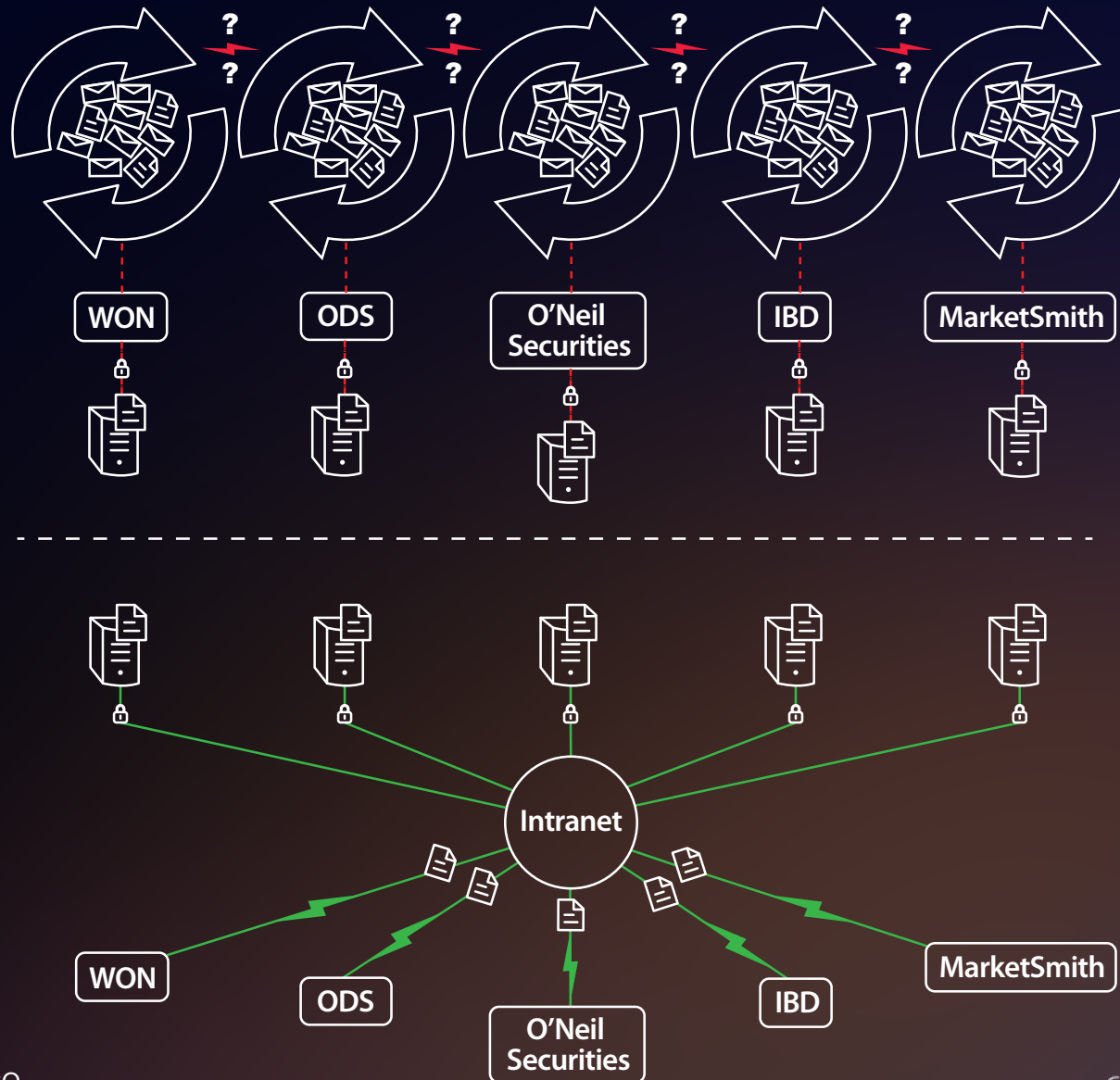# WON Intranet

Discovery Findings 12.21.10

Overview

- Project Objectives

- Stakeholder Interview Findings

- Intranet Features

- Intranet Examples

- Platform options

- Schedules and Next steps

- Appendix

Current Communication vs Intranet

WON
ODS
O'Neil Securities
IBD
MarketSmith

Intranet

WON
ODS
O'Neil Securities
IBD
MarketSmith

Project Objectives

- A centralized structure for information flow

- A place, where employees can listen to leadership messages and also for the leadership to bring its messages to the employees

- An easy way for employees to understand our business, values, vision, mission, products, and competitors

- A fast and easy way to search for people, projects, products, and departments

Project Objectives

- A place for employees to view

  - Corporate news, information, policies, events, announcements

  - HR policies, news, information, and announcements

  - Compliance policies, manuals, webinars

- A platform for users to post their profiles and photos and also look up for other employee profiles

- A document repository with versioning, which is easily searchable, and with access control

Project Objectives

- A place, where employees in a company/department can learn about other departments and companies

- And also let other departments/companies know about their team/department/company

- A space where ideas could be submitted and discussed about.

- A platform to seek and share knowledge

- A highly secured and extensible platform, which could be easily managed by non-techies

Project Objectives

- A well-branded, easy, and interesting platform to author, publish, and consume content

- An engaging experience for users of various age groups and ethnicity, which is not so corporate and dull. Also not cheesy, homey, and high-schoolish

- Look and feel that encourages people to participate

- Cool features that make users love the Intranet and use it more frequently.

Stakeholder Interview Findings

Stakeholder Interview Findings

- Stakeholders:
  - Craig Oldt
  - Jennifer Garcia
  - Angie Chan
  - Richard Markus
  - Elizabeth Wilson
  - Patrick Erickson
  - Jerry Buczek
  - Steve Birch
  - Paul Gin
  - Sarah Schneider
  - Danny for Don Drake
  - Emily Sang
  - Pat Arevalo
  - Gilynn
  - Terry Chan
  - Ed Levy
  - Melody Li
  - Karla Heleine
  - Gail Crozier

- Subject Matter Expert:
  - Salim Hemdani, Razorfish

Stakeholder Interview Findings

- Findings match up very well with project objectives

- Employees really need the Intranet. It is high time

- Intranet as a Central Portal: We are looking forward to it as a one central place where we can get access to all the required documents and work spaces without having to go to several silo systems

- The Intranet has to be strongly tied to the workspace for us to use it frequently

- It should be simple and user friendly and with permission based security

Stakeholder Interview Findings - Themes:

- Search
- Login/Profile
- Navigation
- Social
- HR
- Compliance
- Discussion Forum
- Project Management
- Resource Planning
- Announcements
- Client Information

- Training
- Corporate News and Communication
- Site Management
- Collaboration
- Document Repository
- Approvals
- Notifications
- Links

Stakeholder Interview Findings

Login / Profile
- User name/password
- Personalization
- Language
- Single Sign-on

Navigation
- Homepage
- Site Navigation
- Private access area/Public Access Area

Social
- Blog
- People Profile > "Tell Me about yourself", photos, hobbies, expertise, projects
- Birthday Calendar
- Contests
- Photos > Pics of other offices, party pics
- Review Local Restaurants
- Videos > party videos, virtual walkthrough of other offices

HR
- Policies/news
- Forms/procedures
- Hiring/Termination
  - Job Ads
  - Referral Program
  - Coordinate recruitment process
- FAQ
- "How to" page
  - Set up information for new employees
  - Common admin functions and day-to-day tasks

Benefits
- 401k
- Insurance
- People Movements/changes
- Payroll

Compliance
- FAQ
- Policies/News/Videos/Updates
- Intranet Policy, Documentation of business reasons why information being shared
- Compliance Test/45 mins of video

Discussion Forum
- Submit Ideas
- Share/solicit information
- Comment, receive feedbacks

Project Management
- Post, delete, Share documents
- Collaborate
- View Schedule, releases, reports, status

Resource Planning

Announcement
- Maintenance downtimes
- Holidays

Client Information

Training
- Training Schedules
- Documentation of all job scenarios
- Manuals, wiki of common issues

Intranet

Search
- Product
- Project
- Document
- Client
- Location
- Company/Department

Name, Phone #, E-mail, Compnay/Dept, Role, Supervisor, Photo < People

Corporate News and Communication
- Mission/Vision/About Us/Values
- Info about other Companies/Departments
- Commercials/Advertsements
- Organization Structure
- Live streaming
- Events
- Product Launches
- Meetings/Conferences
- Acquisitions/Changes
- News Letters, Archives
- Corporate Calendar

Stock Info
- E-signal
- Scott O'Neil Speech

Site Management
- Post, edit, delete, and share content < Content Management
- Who can/not view, edit, delete contents < User access control
- Security

Collaboration
- Wiki < Collaboration
- Educational Webinars

Document Repository
- Corporate Style guides
- Common forms and templates
- Conference Materials
- Lay out of printers, installation manuals
- Phone Directory
- List of stocks that are being actively traded by trading desk
- Expense, Travel, and re-imbursement policies

Approvals
- Expense
- PO
- Visitor's Badge
- Leave

Notifications
- E-mail < Notifications

Links
- CRM, WAM, OECS, SharePoint, TeamSystem, ADP, IM, E-mail, IT help desk, PC support < Links

Stakeholder Interview Findings

#	Requirement	Stakeholder
1	Project Management	Patrick, Gail, Angeline
2	Resource Management	Jerry Buscek
3	Collaboration	Richard, Patrick
4	Job Postings and Referral program	HR
5	Client Information	Jerry, Richard, Angeline
6	Approvals	Danny, Emily
7	Links to workspace	Terry

Stakeholder Interview Findings

#	Requirement	Stakeholder
8	List of stocks that are being actively traded by trading desk	Angeline, Richard
9	Notifications	Danny
10	Live feeds from stock market, E-signal	Melody, Ed Levy
11	Sales Contests	Ed Levy
12	Personalization	All
13	Single Sign-on	Gail, Sarah
14	Training:- Documentation of all job scenarios, wiki of common issues	Craig, Jerry
15	List of Bugs	Richard, Angeline
16	Post documents and share it with desired audience	Richard, Angeline, Gail, Patrick

Interview High level Capture: Ordered list & count of requested features

Feature																
News (product, dept, business or Industry)																17
Profile/Projects/Knowledge/Specialties															16	
Communication with Depts or IM															16	
Training/Manuals														15		
Announcements/Events/Stories													14			
User Friendly													14			
Human Resources/Access to Info												13				
Dashboard											12					
Controlled Access/ or Authorization											12					
Employee Contact/Phone List										11						
Document Management/Versioning										11						
General (forms, expense, timesheets)										11						
Share Ideas/Info										11						
Internal Documentation									10							
Policy									10							
Video/Stream (Training/News/Offices)									10							
Bug/Tickets Reporting/Tracking								9								
Calendar/Schedules								9								
Technology/Help Desk/Cheat Sheet							8									
Show/Approve/Track/Projects in Process						7										
Documents for Management						7										
Forum/Blog/Internal Discussion						7										
Centralized Storage/Sharing					6											
Confidental Document Approval Process					6											
File Update Notification					6											
Photos People/Departments/Offices				5												
Tracking PO's				5												
Collaboration/Project Management				5												
Speedy				5												
Notes and ability to update			4													
Org Chart			4													
Lunch/Restaurant/Happy Hour Info/Maps			4													
FAQ		3														
Equipment Manuals		3														
Notifications Visitors/Maintenance		3														
Wiki		3														
Style Guides		3														
Sitemap		3														
Shared Drives		3														
Online Time Tracking	2															
Job Board	2															
Mission Statement	2															
Extensible	2															
Search	2															
Stock List of Clear/Not Clear	2															
Templates/Guidelines	2															
Classified Ad	2															
One Sign In	2															
Attractive																

Intranet Features

Intranet Features

What worked well with others

#	Feature	Company (Top 10 intranets of 2010)
1	Mobile Access	Enbridge Inc, JPL NASA, MITRE Corporation
2	Commenting and Rating Features	GE
3	Project pages where teams collaborate directly and share information	Howard Hughes Medical Institute (HHMI)
4	Technical forums where employees collaborate and share best practices	URS Corporation
5	Discussion and profile pages	Wal-Mart
6	Social bookmarking which lets employees share their favorite links	MITRE Corporation
7	Reward points that accrue to the employees when they contribute to the intranet's community features	Trend Micro Inc.
8	Executive profiles that go beyond work experience and highlight personal experiences and interests	Wal-Mart
9	Expert finder which helps users locatecoworkers who have specific knowledge	MITRE Corporation
10	Role based personalization to focus users on the content and apps most useful to their job	All
11	Dynamic feeds/news streams	All
12	Up-to-date and interesting content	All

Refer Appendix A1

Intranet Features

Few More:

- Book a conference room

- Office layout

- Share a ride

- Review Local Restaurants & Hotels

- Employee Purchase Programs

Lessons Learned

- An intranet is only as good as the **relevancy and currency of its content** [Enbridge]

- **Feedbacks from users is critical** [Enbridge]

- **When content editing is easy, users will be eager to contribute** [HHMI]

- **Different search techniques each have their place** [JPL]

- **A personal touch can go a long way toward getting users on board** [JPL]

- **SharePoint isn't a one-size fits all solution** [Scana Corp]

Refer appendix A2

Intranet Examples

Intranet Examples – Morgan Stanley

Spotlight the lead story

Executive Videos

News, updates and customizable content

Profiles of employees are highlighted

Intranet Examples - NASA JPL Home/Intranet Employee Center

Featured news is updated daily

Very limited personalization

One of the most used sections = Cafeteria Menus

Employee Center = HR and other non-IT support services

Main focus is on Lab-Wide News, Events, and Announcements

Top links appear prominently on the homepage

Top news is published on the intranet portal

Maps are also widely used to help people get around the large campus

Intranet Examples - NASA JPL Search

Searches people, conference rooms, and Intranet link pages.   No integrated document search

Some features and content is only available via the standard SharePoint interface

Acronyms are maintained by the community

Feedback links appear throughout the site

Intranet Examples - Genentech – gBiz Intranet and Intranet Apps

Most used features:
- meeting room finder
- cafeteria menu & catering
- news about product lines
- budget portlet

Less used than expected:
- layout customization
- KPI metrics on homepage

Intranet Examples - Kraft

Central place for dashboard, task list, calendar, project status, collaboration, sharing information, and profiles
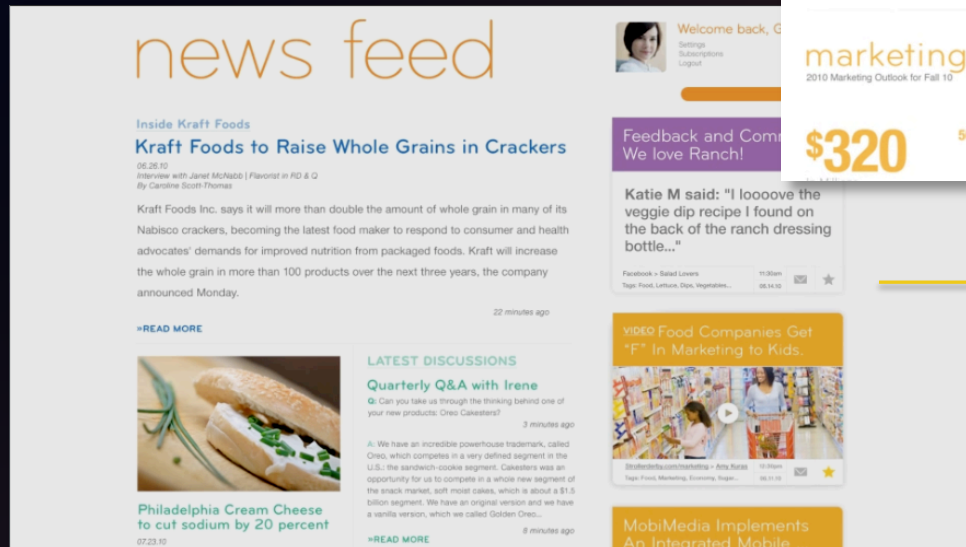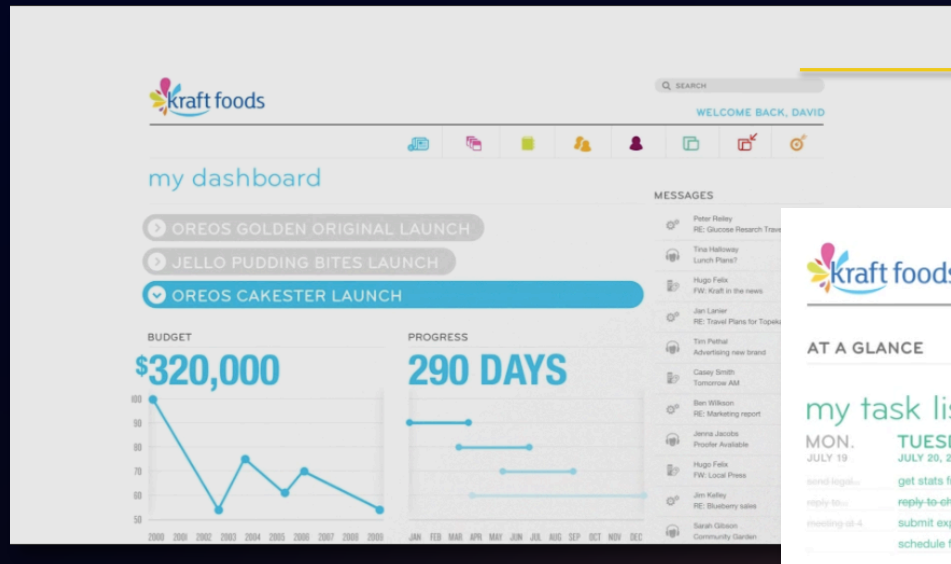
Keeping up to date on the latest company and industry news

Intranet Examples – Razorfish

Most used features:
- Links to shared HR and IT systems
- Discipline specific quick links on homepage
- Access to past client work and outside research
- Ability to search for related client work across multiple RF wiki's and intranet sites

Less used than expected:
- Leadership and department blogs
- Use of the site as a daily resource

Building an Intranet

Pages & structure

Concept

=

Page templates
& guidelines

+
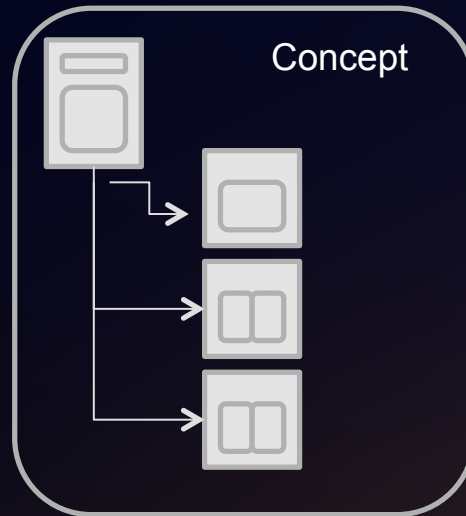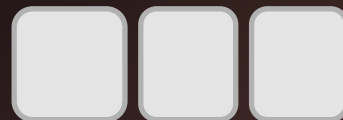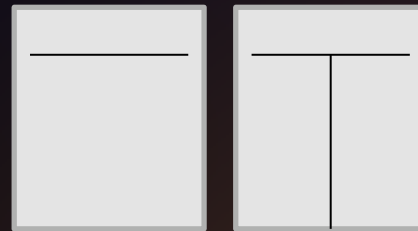
Modules

Foundation

Building an Intranet

Pages & structure

=

Concept

Intranet

Page templates
& guidelines

+
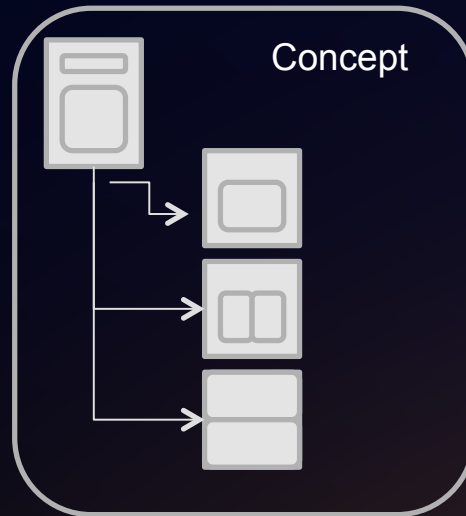
Modules
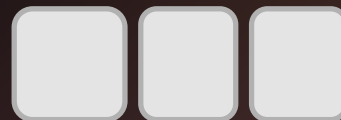
Foundation
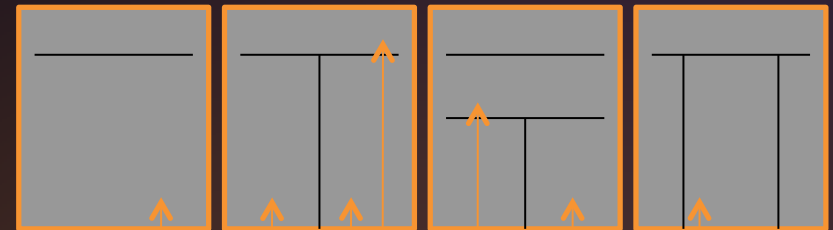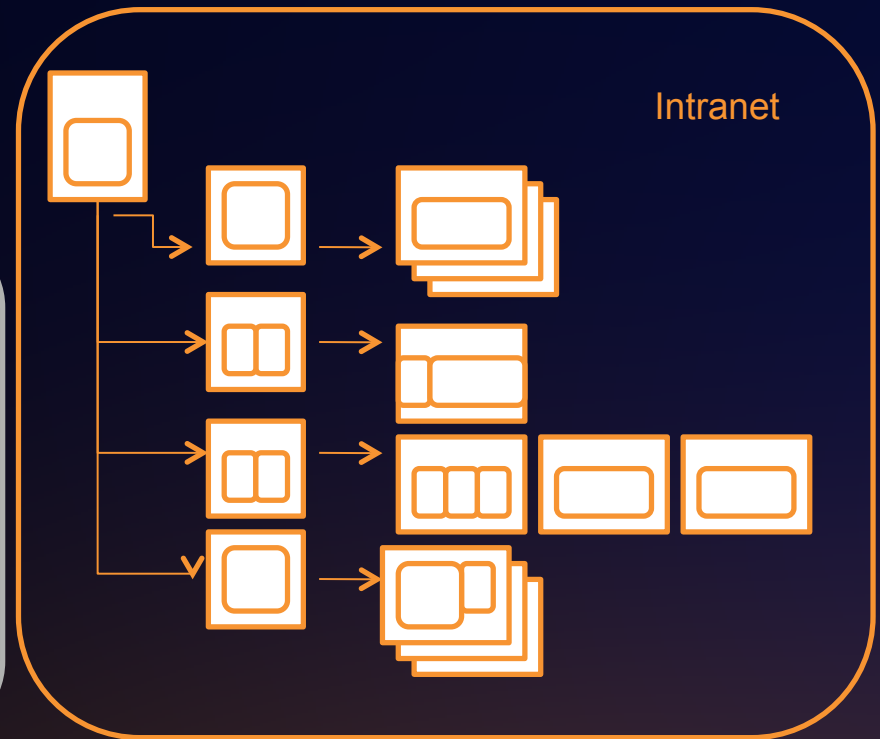
Detailed Design

Platform Options

Platform Options

System/Criteria	MS SharePoint	Telligent Community Server	Newsgator	Liferay
Site URL	http://sharepoint.microsoft.com/	http://www.telligent.com/	http://www.newsgator.com/	http://www.liferay.com/
Content Creation	√	√	√	√
Social	√	√	√	√
Communication	√	√	√	√
People Profile	√	√	√	√
Collaboration	√	√	√	√
Search	√	√	√	√
Flexible UI	√	√	√	√
Integration with Existing Systems	√	√	√	√
User Access Control	√	√	√	√

Platform Options

#	Top 10 Intranet of 2010	CMS
1	Enbridge Inc.	SharePoint
2	GE	InsideGE (In-house, Custom built)
3	Howard Hughes Medical Institute (HHMI)	Alfresco
4	Huron Consulting Group	SharePoint
5	JPL, NASA	SharePoint
6	The MITRE Corporation	Oracle and SharePoint
7	Scana Corporation	SharePoint
8	Trend Micro Inc	SharePoint
9	URS Corporation	In-house, Custom built
10	Wal-Mart Stores Inc	In-house, Custom built

Schedule and next steps

Roadmap

Discovery 12/1-12/22

Direction 12/23-1/10

Foundation 1/10-1/28

Detailed Design 1/31-3/4?

Build Start 2/14?
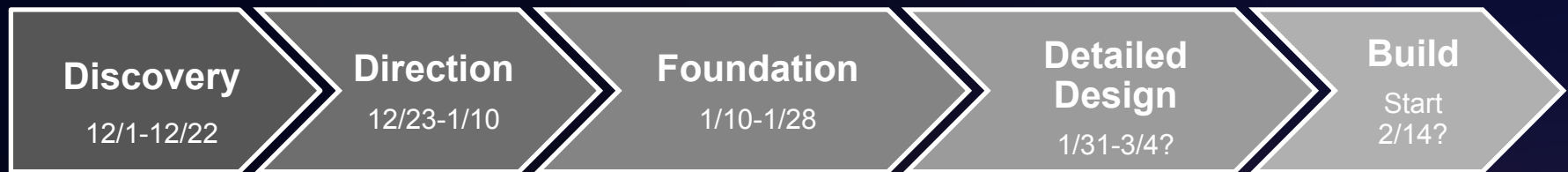
- Stakeholder interviews
- External research
- Discovery findings

- Priorities
- Release roadmap

- UX concepts
- Creative direction
- Platform selection
- Story backlog

- Page template design
- Module design
- Page/Module type specs
- Content and Design guidelines
- management recommendations

- Content (migration)
- Configuration
- Page template development
- Module template development

Project Tracking and review materials; basecamp

Thank You

Appendix

Appendix A1 - NASA JPL Intranet - Mobile
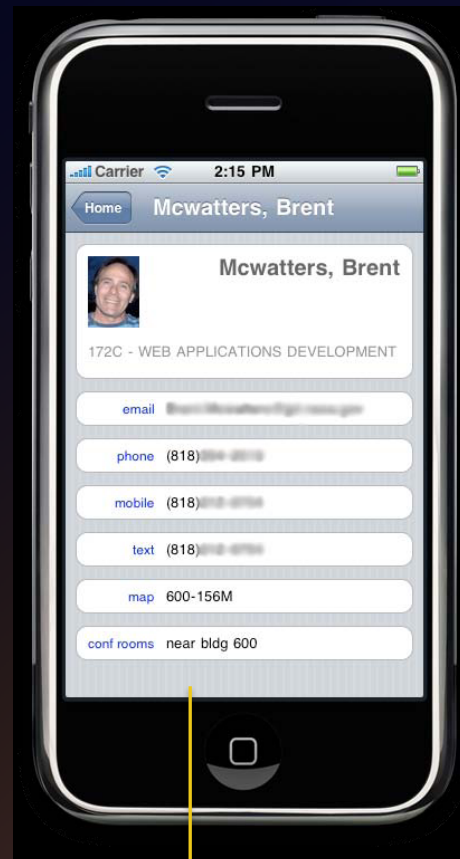
Find a conference room near a person
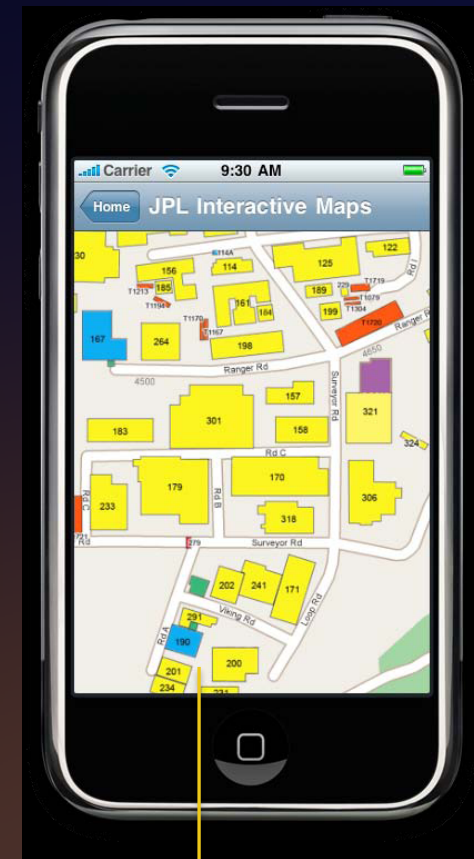
iPhone App allows access to the most used features such as person lookup and interactive maps

Appendix A1 - Top 10 Intranet of 2010
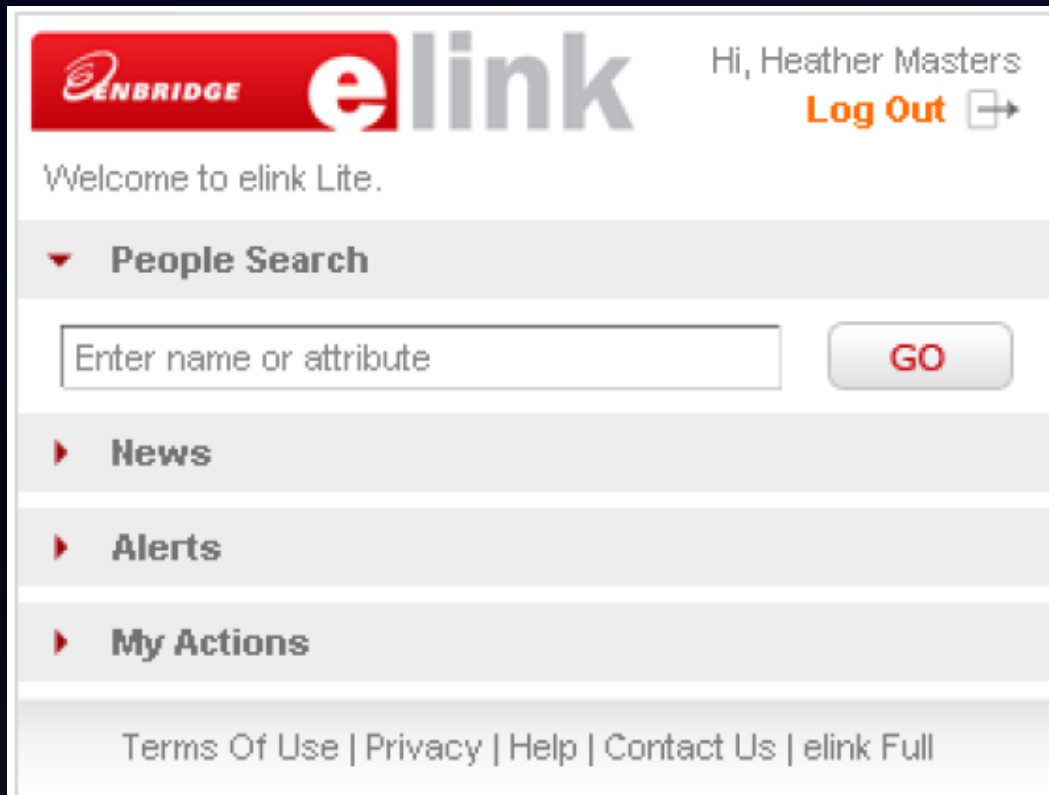
Pictured: The elink Lite mobile homepage offers limited but carefully considered content. The site provides access to mobile users as well as employees in remote locations on slow connections.

Appendix A1 - Top 10 Intranet of 2010
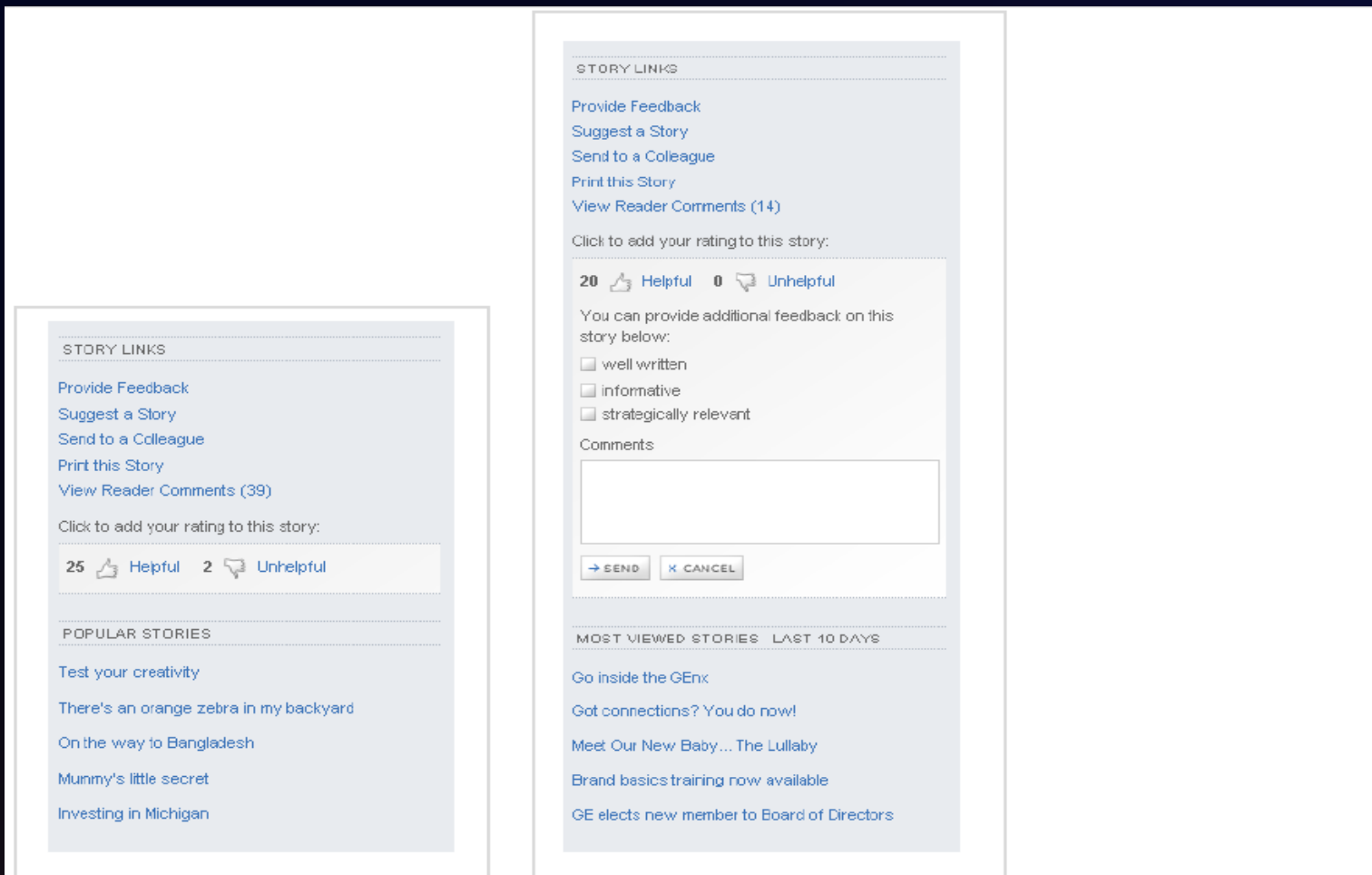
Users can rate a story's quality using *Helpful* and *Unhelpful* icons that appear next to the story. The initial box for feedback (left) expands to allow further feedback (right).

Appendix A1 - Top 10 Intranet of 2010

Appendix A1 - Top 10 Intranet of 2010

Pictured: The *Phytoremediation* forum. As this page shows, forums promote knowledge sharing by acting as central repositories for targeted information.

Appendix A1 - Top 10 Intranet of 2010

Pictured: Discussions are easy to follow on forum pages, and each conversation features large profile images of the participants, giving each a personal feel.

Appendix A1 - Top 10 Intranet of 2010

Pictured: The *Phonebook* employee directory. *Phonebook* acts as a knowledge-sharing resource as well, giving users information about the documents employees have published, communities they're associated with, and projects they're working on.

Appendix A1 - Top 10 Intranet of 2010

Pictured: Employees receive points, or mileage, for participating in interactive site areas. They earn points for contributions such as commenting on blog postings, completing surveys, and providing feedback to colleagues.

Appendix A2 - Lessons Learnt

Enbridge	**An intranet is only as good as the relevancy and currency of its content**. The team went to great lengths to ensure that roles are defined; owners, authors, and approvers are trained; content management functions are built into the job responsibilities.
	Ensure user adoption. Due to the federated structure of the organization, early measures were taken to ensure that the project team Several rounds of usability testing, road shows, timely communications through emails and Web meetings, and efficient marketing through posters and other props.
	Strong search is important. Search is the most frequently used functionality on any intranet, be it people search or content search. Provide different ways of searching, but keep it simple. The majority of users like to just key in a keyword, press 'enter' and be provided with relevant results.
	Feedbacks from users.
HHMI	**When content editing is easy, users will be eager to contribute**. We were surprised by how many people were so eager to have the ability to edit their content. Not having to know HTML' or understand Web publishing.

Appendix A2 - Lessons Learnt

JPL	
	Different search techniques each have their place. Browsing, searching, and using *Quick Find* are all ways for users to get what they want. They each have advantages and disadvantages, but each has its place.

Users have a job to do. Give them tools to do that job. The users came to the intranet portal not to visit it but to find, learn, get information, or access a tool or service. Ensuring the user is efficiently getting value from your site is more important than somehow trying to convince them they should want to go to your site.

Write for the Web. Users will read exceptionally little of what is on your pages, and if things aren't intuitively obvious they won't be understood or used. Make the first few words of each line contain all the key information.

Cross-browser testing is critical. Constant testing of your intranet on a variety of browsers is essential.

The intranet is an ongoing program, not a one-off project. Automate what you can, but manual maintenance will never cease. Change—both within your intranet and with technologies outside your company—will necessitate your intranet portal constantly innovate to stay relevant and valuable.

A personal touch can go a long way toward getting users on board. Sometimes, personal demos are simply the best way to show users what is available from their intranet. Very brief demos in the cafeteria or at team meetings would work well. |

Appendix A2 - Lessons Learnt

Scana Corp	**SharePoint isn't a one-size fits all solution**. We were very lucky that our company had already purchased and implemented it for team sites before we started our project. But with little budget and the fact that SharePoint provided out-of-the-box analytics, search, and an easy to train CMS made the product a big win for us. Despite all that, SharePoint would often throw some curve balls our way when implementing some of our custom Web parts. We built a custom news list for our *Headlines* news listing. When adding a new article, you can set a publish date, an author, and add a photo. After building out the list, we found that when adding a photo, SharePoint would use its out-of-the-box process that involved five pop-up windows for selecting your image. We felt that this out-of-the-box process would be confusing for our non-technical content contributors. We had to go in and custom program the image-selection piece and it added another two weeks onto our project that we weren't planning for. SharePoint may require additional customization to ensure the product meets your needs; however, overall SharePoint is a good product. **Don't assume out-of-the-box functionality will be intuitive**. We also had to custom program the *People* search results. SharePoint doesn't list *People* search results in alphabetical order. Intuitively, our employees are used to a people search that lists individuals alphabetically and wouldn't understand the process SharePoint uses to list the results. So, we had to spend a significant amount of time finding a solution for alphabetizing our results, which ended up being custom code by one of our developers."