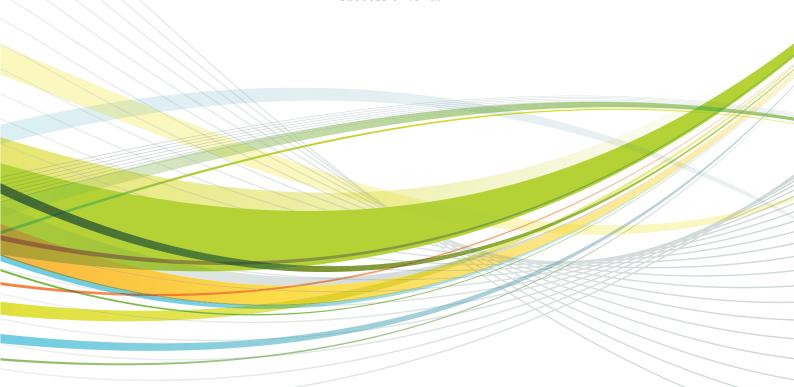


Process model for the creation of an Intranet Concept

White paper written by Volker Grünauer <u>www.advatera.com</u> <u>vg@advatera.com</u>

Advatera stands for the regular exchange of experiences between digital, communication and marketing managers as well as for digital and strategic consulting. Challenges which you have seen in digital, web or intranet projects have most certainly also been experienced by others. The exchange of experiences helps to keep costs down and sharpens one's focus on essential success criteria.





Content

	IMAC	GE INDEX	3		
1	Intr	RODUCTION	4		
	1.1	THE INTRANET CONCEPT	4		
	1.2	WHAT IS MY ROLE AS INTRANET MANAGER?	4		
	1.3	DEFINITIONS	6		
2	INTRANET CONCEPT PHASES				
	2.1	Overview	10		
	2.2	PHASES IN DEPTH	12		
	2.3	PROJECT PLAN	17		
	2.4	Intranet Governance (VI)	17		
	2.5	PROCESS ORGANISATION	19		
	2.6	GUIDELINES	20		
3	WHI	ICH METHODS CAN I USE FOR WRITING AN INTRANET CONCEPT?	20		
	3.1	BALANCED SCORECARD & STRATEGY BLOCKS	20		
	3.2	BENCHMARKING	21		
	3.3	WIREFRAMING, MOCK-UPS	22		
	3.4	USER STORIES	22		
	3.5	TENDERING PROCESS	23		
	3.6	USER INTERVIEWS	23		
	3.7	THE KANO MODEL	24		
	3.8	BENEFIT MAPPING	25		
	3.9	STAKEHOLDER MANAGEMENT	26		

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4	CONT	FACT	. 28
	3.10	CARD SORTING	. 27

Image Index

Figure 1: Phases of the Intranet Concept	4
Figure 2: Intranet management topics	5
Figure 3: Phases of the Intranet Project	10
Figure 4: Classic project management triangle	14
Figure 5: Information Architecture	15
Figure 6: Example of a very rough Wireframe	16
Figure 7: Possible Project Plan Structure	17
Figure 8: Intranet Organisation	18
Figure 9: Rough visualisation of Strategy Map	21
Figure 10: The Kano Model	25
Figure 11: Very simple Benefit Map	26
Figure 12: There is no such thing as an egg-laving, bacon-producing dairy cow :-)	28



1 Introduction

Communication and the transfer of knowledge are the essential foundations for your company's success and are ever gaining in importance. Nowadays most company's use an intranet as an internal communication portal for and with employees. After a number of years it is, however, often time to rethink the existing intranet and to develop a new concept. This guide provides a small aid and aims to outline a process model.

A new intranet lays an important foundation stone for the modern way of working together.

As a modern employee portal, the intranet has three core application areas: Firstly it is a medium for an editorially overseen **internal** communication. Secondly it serves as a **working medium** to support teamwork across departmental or international boundaries. Moreover, it encourages global interaction and networking between employees as a **social medium**.

1.1 The Intranet Concept

The course of an intranet project begins with the creation of an intranet concept. Before the actual implementation can begin, requirements must be set, strategies developed and tasks as well as responsibilities must be allocated.

This document provides a brief overview of the content and functions of an intranet concept.



Figure 1: Phases of the Intranet Concept

1.2 What is my role as Intranet manager?

The following topics should be taken into consideration in the conception of a new intranet:



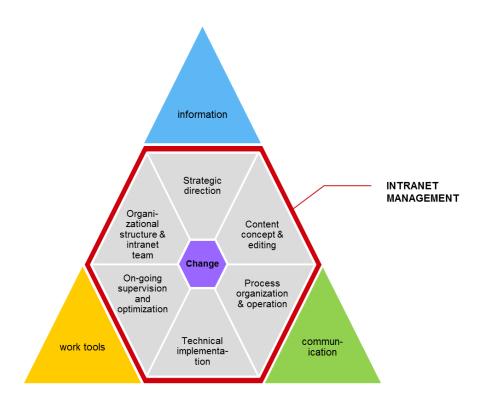


Figure 2: Intranet management topics

Figure 2 shows the main topics an intranet managers has to deal with. You may use these topics as headlines in your intranet concept.

A modern intranet fulfils the three main areas of information, work tools and communication/collaboration.¹

Conceptionally the following topics need to be observed

- o Strategic direction
 - The requirements of the company as well as of each user, so of the employees, should be collected. From the company strategy a strategic direction for the new intranet is derived.
- Organisational structure & intranet team

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¹ Compare: Jane McConnell, online under http://www.netjmc.com/business-value/digital-workplace-in-brief-5-fundamentals/. Jane speaks of managed Managed (information level), social collaboration (communication level) und stuctured collaboration (work medium).

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For a successful intranet the creation of a clear and transparent communicating intranet organisation is essential. After the implementation of the project this is responsible for daily operation and encourages constant further development. As a rule intranet organisation is divided into three areas: intranet management, intranet editing and intranet technology. Within these areas the responsibilities for the intranet project and for daily operation need to be established.

Process organisation & operation

The organisational structure represents a basic set of rules, whether written or simply lived, which guarantee the daily operation of the intranet and clear operational sequences for extraordinary occurrences. Good operational structuring, in combination with a defined structural organisation, serves to create clarity and enables efficient and effective operation.

Content concept & editing

The content concept ensures that the content corresponds with the user and company needs. Alongside an editorial model should be introduced, which would allow for structured editorial discussions and an editorial planning. The creation and moderation of user-generated content should also be considered in the content concept.

On-going supervision and optimisation

A part of the intranet concept is the derivation of KPIs (Key Performance Indicators) from the strategy. These indicators must flow into a reporting system to show which implications exist for optimisation and further development. Alongside classic web analysis, user surveys and quantative analysis (usability tests) should also be carried out.

Technical implementation

The technical implementation constitutes the foundation of the intranet. A holistic integration of the decision-makers into the technical implementation of the master plan is important.

1.3 Definitions

1.3.1 Why do I need a concept?

The idea of an intranet concept may be applied broadly or narrowly: in many projects it purely denotes the development concept from the user needs all the way to the ready implemented



platform, in others it also comprises the topics of structural organisation, organisational structure and the composition of content.

1.3.2 What is Intranet Governance

By governance we understand a guidance system for the intranet. Governance is a constantly accompanying function, it begins with the project implementation, is there for the roll-outs and secures daily operation.

Intranet governance has as its goal the creation of an efficient organisation with binding basic conditions for the daily operation of the intranet. It sets itself critically against the organisation structure and the existing processes.

Dependent upon whether a clear intranet organisational structure and structural organisation already prevails in the company, governance will have a greater or lesser role to play in the intranet concept. In contrast to that part of the concept which flows into the implementation of the new intranet, governance ensures continued operations in excess of the implementation.

The intranet governance pursues the following goals:

- **Strategic direction of the intranet** incl. vision and goals are broadly communicated and are constantly adapted.
- Functioning **Organisation** is introduced, which efficiently operates daily business.
- Clear roles and responsibilities are established in the intranet and there exists transparency in decision competencies.
- Information and functions in the intranet are **current and relevant.**
- Guidelines for responsible handling of information and communication on the intranet are created and used by employees.
- Employees are motivated to use the intranet and recognise the **advantages for daily** work which will then also be realised.
- Stakeholders with differing **interests** are harmonised and taken into consideration.
- It is **established that further development creates advantages for the company** and adds value.
- Figures are identified and quantified and this leads to a continued optimisation and review of target achievement.

Content governance actually represents a part of intranet governance and concerns itself with issues such as:

- Safeguarding the relevance and actuality of content
- Moderation and motivation for user-generated content



- Rules for language and meta tagging in the intranet
- Concept for keywords and search optimisation
- Definition of information architecture and rules for further development

1.3.3 What name to prefer for the intranet?

What is your new intranet called? As an alternative to the name 'intranet' the following have become popular:

- Employee portal
- Digital workplace
- Social Intranet
- Intranet 2.0

Here are a few ideas for specific names²

- BT Intranet (British Telecom)
- iConnect (Coca Cola)
- PfizerWorld (Pfizer)
- Connect (WWF)
- MyPort (HSH Nordbank, derived from 'Harbour')
- InfoLink (Texas Instruments)
- RedNet (Mobiliar, derived from the company colours)
- Brain (Roland Berger, old intranet. The new is called simply 'Intranet')

Ultimately an expressive name is important for an intranet. It should represent the corporate culture and its communication style, appear friendly and motivating and portray the goals and purpose of the intranet.

If a name for the intranet has already been implemented at your company and this does not evoke any negative emotions in users, the existing name should be kept. It is far more important that your intranet is supplied with version numbers. An intranet redesign should always be a

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² Aus Advatera Expertengruppen und Webrecherche. Weitere Informationen: http://www.advatera.com/intranet/digital-workplace-mitarbeiterportal-oder-doch-intranet/

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renewal rather than a complete remake. This is important for your project communication: as even if in your view the internet is being completely newly drawn up, this would appear from the outside as if the old intranet project failed and had to be re-done from scratch. The communication of version numbers at least within the project team helps to create an understanding of an advancement.



2 Intranet Concept Phases

2.1 Overview

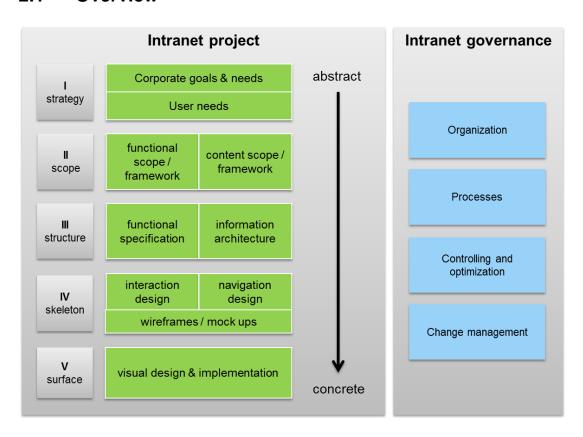


Figure 3: Phases of the Intranet Project³

The conception phase stretches from the strategy, through definition of the project framework (scoping) to the final graphic presentation and implementation. In parallel an organisational structure and a structural organisation in the form of an intranet governance must be created, which will ensure the later introduction and daily operation of the intranet.

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³ The project phases come from Garrett, Jesse J.: The Elements of User Experience. User-Centred Design for the Web. New Riders, 2002. pg 33. The model was adapted and made to suit intranet and governance requirements.

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Various partners will often participate in this process. Roughly represented, there are three approaches:⁴

Conception independent of technology and implementation partners

The concept is developed independently from a technology decision and/or an implementation partner (technical agent). The implementation partner is only brought on board at the end, for example in phase IV or V. A clear disadvantage is that the implementation partner cannot thus be involved in the concept. In return, the concept is created free from any technological restrictions. Sometimes a firm decision for a technological platform already exists, then this model suggests itself.

- Concept together with implementing agency

The concept is created together with the implementing agency. Therefore the tendering takes place before the creation of the concept. An advantage of this is that the implementation partner will have a high level of understanding for the project goals and the individual results of the concept phase. In the Advatera expert groups it has however been shown that only very few companies take this route. Above all, because there are only a few agencies in the market which truly combine a high competence in strategy, conception, design and implementation. In addition, only a very rough tender can be created without an existing concept, so additional project risks arise. In this course of action there is a great danger that individual concept phases may be neglected or even skipped over and that suggestions in the direction of design and implementation will follow too quickly.

- Conception created independently but implementation partner gets involved in an early stage

The concept is created internally or with the help of a strategy advisor. The implementing agency is brought on board between phase II and III. Should the decisions on technology not yet have been made, this will also be kicked off between phase II and III. This model allows for a targeted tendering based on the requirements and strategies which have been identified in phase I and II. Through the earlier involvement of the implementation partner it is ensured that the concept is easily realisable. The implementation partner can co-determine or take over parts of the conception work (for example wireframes, interaction design...)

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⁴ Experiences from the Advatera expert group. Incidentally, Advatera also offers strategy consulting for members, in particular for the creation of concepts. We also help with technology determination and tendering for implementation partners. Members also receive a free template for a tender offer.

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2.2 Phases in depth

2.2.1 Strategy (I)

The strategy presents the direction of the intranet and is derived from the company strategy. An intranet strategy is compulsory for a redesign or new intranet project in order to guarantee that the company's and employee's needs are fulfilled. Instead of hundreds of pages or strategy papers, the creation of a short and concise paper is recommended, which includes the following topics:

- Vision

O A vision statement and a short description of the vision. The vision statement should be easily memorable. Henceforth it will be used at the beginning of every project presentation and on posters distributed to the project team. One idea is to print out the vision statement for each team member and each member signs on every copy. Thus each team member forges a strong connection with the vision and the project.

- Project Aim

 Derived from the company strategy, the employee requirements and the identified advantages, the project goals will be definied. It is important to define measurable goals.

- Identified Strategy Blocks

O A classic display format for strategy is based on the balanced scorecard model (see 3.1). Strategy blocks are identified which can also serve well as work packages. Often an accompanying change management is also necessary alongside the function and content conception, and this can be well presented in these strategy blocks.

Methods which help with the creation of strategies are summarised in chapter 3.

2.2.2 Project Scope (II)

The scope – or project framework – is a derivation of the rough functional and content requirements from the intranet strategy. It presents a weighting of the user requirements which have already been surveyed. During the course of the scoping personas, a prototype description of users which should represent a user group, are also used. If you make use of personas, we recommend a very pragmatic approach. The creation of personas can become very scientific and complex and often takes weeks, if not months. However, personas can also be identified



very pragmatically in a workshop in a matter of hours. Personas aid with scoping as it is continually verified whether the respective content or functions reflect the needs of at least one of the personas.

- Functional framework

In the beginning it makes sense to weigh up the probably numerous existing wishes against goals. *Benefit mapping* is well suited to this. The functional framework is also a good starting point for a technical specification. However, please note that this is a list of functions and their weighting, not a final description of the individual business processes of the intranet.

This phase already lends itself to the 10 most important functions, to describe these textually using rough user stories. These functions can be used also as basis for the tendering of the intranet. The user stories are the best foundation for a well written rfp (request for proposal).

Content framework

The intranet consists, alongside the functions, of a great deal of content. Often there is already a structure through the existing intranet. This structure is reconciled against new requirements and is adapted. The aim of this phase is not a complete navigation concept, but rather the establishment of key aspects to the content and – important for the accompanying governance - the establishment of the individual topic areas.

A content map should be created, which provides a first view of the new content concept.

- Non-targets

Scoping has the main goal of defining a framework for the project. The project triangle is always made up of cost, time and scope. As only limited resources are available, realistic project boundaries must be defined, which are also realisable. The versions of your intranet provide the possibility of delaying individual content and functional goals until the next version. Ensure, however, that the identified advantages (benefits) are still fulfilled by the new intranet. Only when clear advantages for the company and its employees are identified and maintained will you be able to achieve the required level of understanding for the project from those outside of the project team.



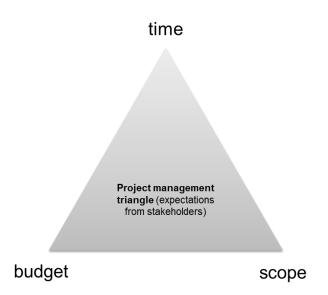


Figure 4: Classic project management triangle

From this scoping process one can derive good tendering material for a technology decision and/or a decision on an agency. Regarding the correct tendering process, a document will be available shortly from Advatera. Templates for tendering offers are available within the Advatera expert groups.

2.2.3 Rough Specification and Information Architecture (III)

After the scoping phase the functions (functional specification) and the content (information architecture) will be specified in detail.

- Functional Specification

The functional specification contains the list defined in the scoping phase of all functions decided upon for the new intranet. Each individual function will be sketched with the aid of a process description from the view of user. A typical project mistake is to describe the functions in too much detail. Think of an agile project environment in which an understanding for every function will be constructed, but in which the finer specifications will first be made in the implementation phase. Naturally the specification should also not be too general. Each function must be described so that a designer and a programmer can use it to derive the implementation. It is advisable to use a structured form for the definition of every function.

A mistake that often happens is that people start thinking about graphical design in

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this phase. Try to focus on business processes and workflows rather than colours and pixels. Never fear, in the next phases you will still have direct influence over the graphical layer.

- Information Architecture

The information architecture is derived from the content framework. One method here is *Card Sorting*. Involve potential users in the workshops. The goal is the determining of an information architecture which usually already looks similar to a site map. Take into consideration the simple and understandable naming of categories and test the information architecture already at this phase with potential users.

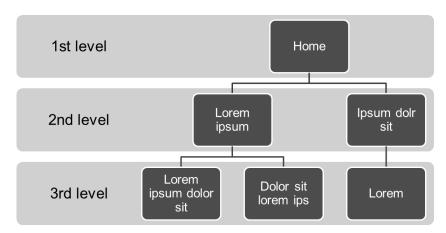


Figure 5: Information Architecture

2.2.4 Interaction and Navigation Design (IV)

A wireframe will be developed from the materials now at hand and templates such as your corporate style guide. On the one hand this depicts a rough framework for the graphic design to be built upon it, and on the other it brings the information architecture and a functional framework together.



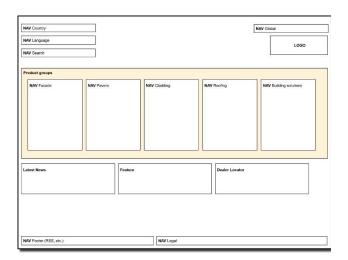


Figure 6: Example of a very rough Wireframe

The wireframes are, incidentally, mostly implemented by an information architect or the designer responsible. It is important that you play an important role in the creation of the wireframe. You know your company and its business processes best.

2.2.5 Visual Design and Implementation (V)

The visual design for the new intranet can be generated from the wireframe and the remaining concept content. Often this is no longer a part of the concept phase, but is rather already a part of the implementation phase.

Good designers and agents will only create a graphic content once a clean wireframe is in place. All other results will already have been anticipated. The designer may be one of the best graphic designers, however that does not mean that he completely understands your business processes and company goals. For this reason the separation between conceptual phases, the creation of the wireframe and the downstream graphic design is so important.

Especially in cases of a separation between the graphic agency and implementation partner you need a good handover process, so that the implementation partner has an integral concept which they can use as a basis.



2.3 Project Plan

For the concept, a phase plan with the individual project steps cannot be missed out. In addition to the phase plan it is recommended to put together a project communication plan and an editing plan and reconcile these with each other. Good content is crucial for the start of the new intranet.

Only when the content for the new intranet is available in time, a roll-out into the organisation can take place. Remind: the real life starts after the roll-out.

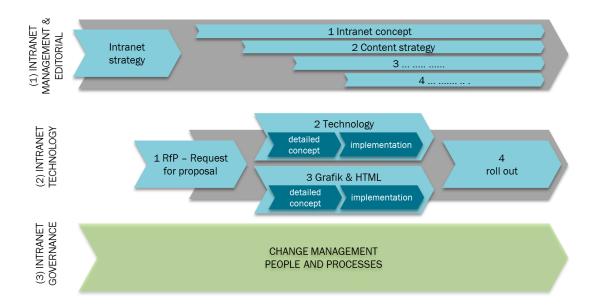


Figure 7: Possible Project Plan Structure

2.4 Intranet Governance (VI)

Intranet governance presents an accompanying phase for the creation of the intraneet concept. Numerous concept topics have an effect on governance. As a result the roles and responsibilities for editing can be derived from the content structure.

2.4.1 Organisational Structure

Typical intranet organisation consists of the following roles:

- **Intranet Management**Responsible for the strategic and conceptual direction and further development of the

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intranet. Responsible for reporting and intranet change management. Also for user motivation and for training and project marketing.

- Intranet Editing

Responsible for content presentation and the continued maintenance of information. Training of editors and identification of information contributors is also the role of editing. Often user-generated content and its moderation falls into the role of editing.

- Intranet Technology

Responsible for realisation and implementation. Also for continuous maintenance, the processing of change requests and support also falls under the tasks of the intranet technology.

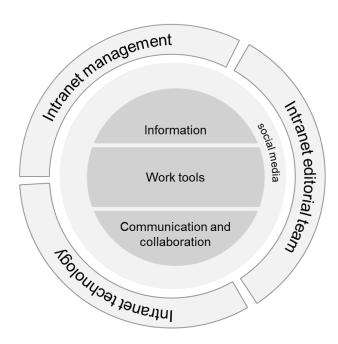


Figure 8: Intranet Organisation

Social media is the layer which sticks together the functions information, work tools and communication.

Every role can be decentralized or centralized:

- Decentralised

A decentralised model is frequently selected by intranet editing. There is an editorship

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which represents the various departments or country organisations. A middle-way is also possible: a centralised editorship however with advisory from assembled decentralised editors.

The intranet management can be assembled from various managers in the form of a board. Mostly, however, a central approach or middle-way is chosen.

Likewise for IT. This is decentralised only if there are several intranets in the company. This is sometimes the case with much diversified business areas or strong country markets. First level support is also often decentralised.

- Centralised

Centralised management offers the advantage of quick decision making and better project control. In most cases the intranet management and intranet technology are centrally located, they are however supported by a decentralised advisor.

In addition a management group can be put together, which makes annual or semi-annual decisions on strategic development. It is important that this management group is located as high up in the company as possible and, of course, buy-in by top management is essential.

A further possibility for guidance is a project sponsor, possible from the management team, who is regularly informed on further development and who can make decisions in consultation with his colleagues.

The involvement of project ambassadors in the intranet organisation can be helpful for the rollout of the project. The ambassadors have the task of managing project marketing in their environment.

The organisational structure must be developed individually for the company. Only an intranet organisation which suits the corporate organisation will have success.

2.5 Process Organisation

The definition of operational structuring means the defining of the processes within the intranet organisation. It ensures that an efficient and effective daily operation of the intranet is possible.

As well as process descriptions, tutorials and trainings are also established.



2.6 Guidelines

The following documents should result from the intranet governance:

- Template for editorial meetings, editorial plan
- Communication code of practice; do's and don'ts on the intranet
- Escalation processes
- Description of Roles and Responsibilities
 - O Who may create content?
 - o Who may approve content?
 - o Who may change the information architecture?
 - o Who generate the reporting?
 - Who is responsible for search optimisation?
 - Who takes care of first-level support questions?
 - o Who decides upon change requests?
 - o Who makes budgeting decisions?
 - 0 ..
- Training plans
- Technical guidelines

3 Which methods can I use for writing an intranet concept?

The methods introduced here provide assistance in the creation of the intranet concept. Of course the classic project management methods apply to the intranet project. This only caters to supporting methods for the conception.

Please see below a selection of possible methods. Not every method is suitable for challenge. These are the methods most often moderated by Advatera.

3.1 Balanced Scorecard & Strategy Blocks

The balanced scorecard and the strategic map resulting from it enables the separation of strategic direction into 4 main areas:

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- Customers (also internal customers/clients)
- Financial (effects of the intranet on financials)
- Processes (internal processes to fulfil client expectations)
- Learning & growth (company potential and the support of this potential by the intranet)

The balances scorecard is recommended above all if the company is also directing other projects on the basis of a scorecard.

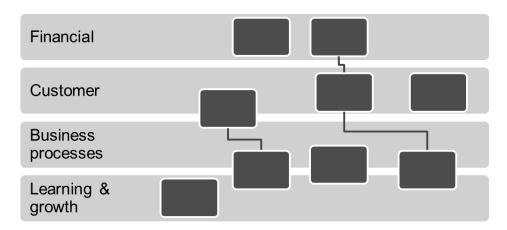


Figure 9: Rough visualisation of Strategy Map

The strategic blocks identified in the strategic map are often also work packages.

It must be said of a balanced scorecard that this sometimes equates to an enormous amount of effort. Certain strategic implications can however be derived from a simplified course of action. It serves simply as an intellectual approach to strategic development.

3.2 Benchmarking

An informal benchmarking can, for example, be created very quickly with the help of Advatera intranet expert groups. It is important to refer to certain core questions. Benchmarking also can be made many times in the project according to current challenges.

Example: a benchmarking of the approach to international versus local content or a small benchmarking of the resources available for an intranet team or for editing.



In the longer term a yearly benchmarking with defined categories is advisable. The intranet satisfaction questionnaire from Basel University enables, for example, a yearly comparison of one's own intranet with those of other companies.⁵

3.3 Wireframing, Mock-ups

An example of a wireframe was already given in 2.5, Interaction and Navigation Design.

The following concept definitions are mentioned:

- Wireframe

Comes originally from a tailor's dummy. Similar to the wire frame model used in earlier times by tailors for their customers to create a rough model, today enables web and internet sites to be more simply developed through the use of a line model.

- Mock-ups

Goes one step further: it consists of the first graphic elements and sometimes is already clickable. Gives a deeper insight into the future intranet.

The difference between wireframe and mock-up is fluid and even among web designers there are discussions on which is which.

3.4 User stories

Everyone can write stories. User stories provide a short and concise, but above all also the most realistic possible depiction of processes. Before you start a user story, give a short description of the user involved and the basic parameters.

An excellent book on this topic is: Story telling for User Experience⁶ by Rosenfeld Media.

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⁵ Intranet Satisfaction Questionnaire from Basel University:

http://www.intranetsatisfaction.com/index_html?content=hintergrund. One of the founders of this survey, Sébastien Orsini, is, incidentally, a part of the Advatera network. Contact details in http://my.advatera.com

⁶ Buch von Rosenfeld Media: <u>http://rosenfeldmedia.com/books/storytelling-for-ux/</u>



3.5 Tendering Process

Often part of the intranet project is also the selection of a CMS (Content Management Software), a technology partner and/or an implementation agent.

An overview of the selection process can be found here: http://www.advatera.com/beratung/cms-auswahl/

3.6 User Interviews

Interviews are a good method of determining the requirements of an individual stakeholder or of a target group. In interviews it is important to create a good atmosphere. Explain the project and the content of the discussion briefly to the interviewees. Make it clear what the intranet project is about.

A guide to typical questions:

- Could you briefly outline for me your role at?
- What does a typical day at work look like?
 - o With whom do you communicate?
 - o What information do you look for?
 - o How much time do you spend in front of your computer?
 - o How do you look up colleague's telephone numbers?
 - o How do you go about finding out where a particular colleague sits?
 - o ...
- What does the intranet mean for you?
- Which part of the intranet are you currently using?
- What does the intranet help you to do?
- What can the intranet currently not do? What is not working well?
- Where do you wish that you had more support through the intranet?
- ...

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3.7 The Kano Model

Noriaki Kano⁷ divided customer's requirements from products into three criteria:

- **Basic requirements** are those requirements which, if not fulfilled, lead to deep dissatisfaction. Example: You check in to a hotel, go to your room and then to the bathroom. There is no toilet paper. A basic requirement has not been fulfilled. However, when booking a hotel you would not ask especially at the reception about toilet paper, you simply expect it to be there.

Such requirements also exist among intranet users. If these are not enquired about in the interview phase and are not considered in the concept, there is a risk that the user will be highly dissatisfied.

- **Comparative requirements** are each requirement which is mentioned in a simple survey. One concentrates on these above all others, because they were articulated and requested by the user. If one successfully fulfils these, the user is happy. If one fulfils them badly, after having raised their expectations, the user will be dissatisfied.
- **Excitement requirements** are functions which the user does not expect, but which they will be excited by. Try to fulfil a few exciting characteristics with your intranet and the users will have a high level of satisfaction. Of course potential exciting characteristics should be tested with users first and afterwards the user should be questioned on whether the function is really beneficial in this capacity.

Ultimately, the Kano model is not an autonomous method, but rather an extension for surveys and the identification of user needs.

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 $^{^7\,}More\ on\ the\ Kano\ Model\ can\ be\ found\ on\ Wikipedia:\ \underline{http://en.wikipedia.org/wiki/Noriaki}\ Kano\ Model\ can\ be\ found\ della \ \underline{http://en.wikipedia.org/wiki/Noriaki}\ Model\ can\ be\ found\ della \ \underline{http://en.wik$

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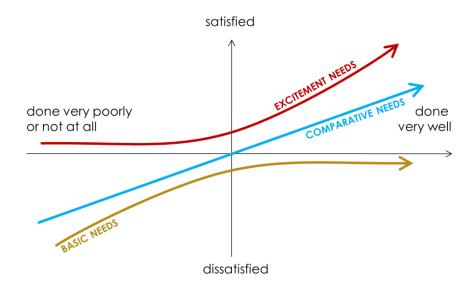


Figure 10: The Kano Model

3.8 Benefit mapping

In projects it is often the case that, in spite of strategy development, the focus gets lost on the course of the project. Topics may be struck from the list because the implementation appears to be too complex, it conflicts with security issues or because the budget is too tight. From the other side new aspects and themes are brought in and then once more set aside.

It is for this reason that benefit mapping may be recommended. It is a simple map which balances the identified project advantages (advantageous functions) against company goals and employee requirements.



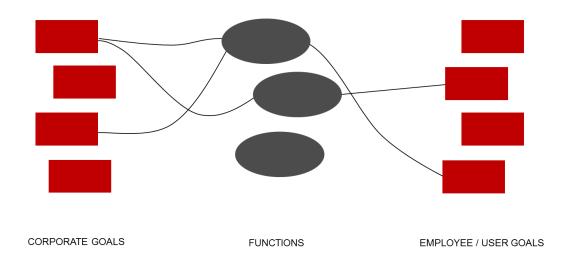


Figure 11: Very simple Benefit Map

An intranet will only be successful if the essential functions simultaneously fulfil company goals as well as user requirements. An imbalance will only create problems: if more company goals are pursued and the employees do not see any advantages, they will be less motivated. If, on the other hand, employee needs are met but the company goals are not, communication with management will become difficult.

Examples:

- How would you arrange a blackboard where employees can sell their cars, pieces of clothing and similar items?
- How would you arrange a project group in which employees can exchange project information and work together more easily?

The clear arrangement of benefits helps to market the project to management as well as to employees.

3.9 Stakeholder Management

The individual stakeholders are identified and classified according to their influence on the project and the interest which they show in the project's success with the aid of a stakeholder map.

The stakeholder map makes a clustering of the stakeholders possible and, in a further step, provides a clear line of communication. It may also establish which topics are communicated to individual stakeholder groups and with what frequency.

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3.10 Card Sorting

Card sorting is recommended for the creation of the information architecture and the navigation structure. One can choose between:

- **Open Card Sorting** the categories are not pre-set and interviewee must set them himself.
- **Closed Card Sorting** categories are pre-set, the interviewee must assign the cards (with the contents) to the respective categories. This is recommended to test an existing structure.

Rosenfeld Media have a very good book on card sorting: http://rosenfeldmedia.com/books/card-sorting/



4 Contact

Advatera stands for the regular exchange of experiences between digital, communication and marketing managers as well as for digital and strategic consulting. Challenges which you have seen in digital, web or intranet projects have most certainly also been experienced by others. The exchange of experiences helps to keep costs down and sharpens one's focus on essential success criteria.

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One final note: the intranet concept should of course be comprehensive and concise. There is, however, no such thing as an egg-laying, bacon-producing dairy cow, focus on the essential elements and let your intranet project develop with a little space to roam.

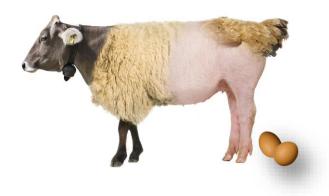


Figure 12: There is no such thing as an egg-laying, bacon-producing dairy cow :-)