Designing and Managing an Intranet

Better Practice Checklist

Practical guides for effective use of new technologies in Government
Most Australian Government departments and agencies have developed intranets to facilitate information sharing and communications across their organisation. These intranets have often grown significantly over time, and a key challenge being faced by agencies is ensuring that their future growth and development remain manageable.

A key role of the Australian Government Information Management Office (AGIMO) is to identify and promote 'Better Practice'. This checklist has been created to help agencies establish and manage intranets that are effective in the short term and will remain viable and sustainable into the future.

This checklist suggests that a number of issues should be considered when designing and managing intranets. The items in the checklist are, however, not mandatory.

This checklist is intended to be a guide to staff responsible for intranets, including those in website or intranet teams. The information within this checklist may also be relevant to Chief Information Officers, IT steering groups, and other senior managers. Other IT managers may also find the checklist useful in dealing with contractors, or where this function is otherwise outsourced. This checklist focuses on non-technical issues.

It should be noted that the checklist is not intended to be comprehensive. Rather, it highlights key issues for agencies. The checklist is iterative and draws on the expertise and experience of practitioners. The subject matter and issues are reviewed and updated to reflect developments.

Comments about the checklist and suggestions for additional checkpoints can be directed to:

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Copies of this and other checklists are available at: www.agimo.gov.au/checklists.

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14. DESIGNING AND MANAGING AN INTRANET

Overview of designing and managing an intranet

An intranet can be a valuable and effective business tool for an organisation. It can be a strategic asset that supports key business processes, improvements in efficiency as well as greater staff and customer satisfaction.

While most agencies have had an intranet for at least several years, many intranets have grown organically, leading to sites that are challenging to manage.

Despite the difficulties, individual agencies have found ways of successfully implementing their intranets, and many have applied innovative approaches. The challenge has been to share this knowledge amongst agencies, when intranets are by definition internal to each agency.

Based on the experiences of a wide range of organisations (including many government agencies), this checklist brings together a range of suggestions for establishing and maintaining an effective and sustainable intranet.

These guidelines are equally appropriate for agencies that currently have an intranet (and may be looking to redevelop it) and for organisations that are implementing an intranet for the first time.

Basic issues associated with managing online content are covered in Better Practice Checklist 8, Managing Online Content.
### SUMMARY OF CHECKPOINTS

#### BEFORE YOU START
- Distinguish between websites and intranets
- Consider the potential of the intranet to enhance the operation of the organisation
- Consider the specific needs of the organisation
- Seek out the experiences of other agencies

#### DESIGN AND CONTENT
- Apply user-centred design techniques
- Schedule regular evaluation of the intranet
- Incorporate ‘killer applications’ and make the intranet a place for ‘doing things’
- Ensure high-quality content
- Consider the most appropriate structure for the intranet
- Establish content review processes
- Ensure that the intranet meets accessibility standards
- Consider recordkeeping issues
- Consider implementing a content management system

#### POLICIES AND PROCESSES
- Identify staff and business needs
- Determine intranet goals
- Establish a cross-functional team
- Seek an intranet sponsor
- Consider appropriate governance models
- Determine an appropriate authoring model

#### COMMUNICATIONS AND CHANGE MANAGEMENT
- Build trust in the intranet
- Market the intranet
CHECKPOINTS

BEFORE YOU START

☐ Distinguish between websites and intranets

Beyond a common use of HTML, intranets and corporate websites differ in many respects. These differences would be expected to be reflected in the design of the intranet and in management processes.

Differences include, but are not limited to, the following:

• business goals
• audience
• users' familiarity with the site
• users' browsers and platforms
• site size content and structure
• appearance of site
• frequency of updates and authoring models
• metadata
• integration with other systems
• legal liability.

☐ Consider the specific needs of the organisation

An intranet reflects the unique culture, structure, processes, staff and resources of the organisation that it serves. Instead of there being a single 'best' intranet design, each intranet must be tailored to fit the organisation's needs and challenges.

☐ Seek out the experiences of other agencies

A range of agencies have developed considerable experience in designing and managing intranets. Sharing experiences between agencies is an effective way of building expertise and supporting the ongoing innovation of the intranet.

A community of practice called 'Intranet Peers in Government' has been established to facilitate this knowledge sharing between Australian public-sector and non-profit organisations. Membership is free, and details on this group can be found at www.intranet-peers.org.
POLICIES AND PROCESSES

The volume of information managed on an intranet demands that policies and processes are put in place to ensure that content and tools remain effective. The intranet must also be positioned to meet the needs of staff and be integrated into the business processes it supports.

Identify staff and business needs

An intranet must be useful for staff if it is to be successful. The information and services it provides must match staff and business needs.

Techniques that can be used to identify staff needs include:

- stakeholder interviews
- surveys
- focus groups
- workplace observation
- usability testing
- usage statistics and search engine logs of intranets to be redeveloped.

Agencies may find it useful to use a number of techniques, to ensure that findings are representative and meaningful.

Determine intranet goals

Based on the needs of users, a set of intranet goals can be identified and documented. These may underpin the design and development of the intranet, form the basis for the internal marketing and communications activities, and outline the strategic direction for the intranet into the future.

Effective intranet goals generally focus on business outcomes, instead of goals such as ‘efficiently disseminate accurate information throughout the organisation’, or on other activity-based measures. Business-focused goals will help ensure that the intranet is valuable to the organisation and may be easier to measure and track.

Goals may include:

- increasing staff efficiency, productivity and satisfaction
- improving decision making
- improving customer service, providing accurate and consistent advice
- supporting internal communications and collaboration
- reducing duplication of effort and costs
- building corporate identity
- improving corporate governance.

The most effective goals may be those directly related to the business activities and nature of the organisation. For example, health organisations may find goals that relate to health outcomes particularly useful, and so on.
Checklist 14

Better Practice Checklists

14. Designing and Managing an Intranet

☐ Establish a cross-functional intranet team

The establishment and ongoing development of an intranet require a diverse skill set as well as the consideration of issues from a number of viewpoints. The roles required within intranet teams may include:

• intranet coordinator (project manager)
• web designer and graphic artist
• usability specialist
• information architect
• technical writer
• subject matter experts
• professional indexer or librarian
• journalist
• communications specialist
• business analyst.

Note that, depending on the size of the organisation, one intranet team member may fill several roles. The roles may also be filled by permanent team members or drawn from the rest of the organisation (or externally) as required.

☐ Consider appropriate governance models

Effective governance mechanisms will enhance the management of the intranet. As the intranet is a resource that supports many areas of the organisation, intranet steering committees or similar groups may involve appropriately senior people from across the organisation.

☐ Seek an intranet sponsor

Project sponsorship can be a critical success factor in information technology projects. With the development and maintenance of an intranet involving many areas of the organisation, it is useful to identify an appropriate intranet sponsor.

Senior intranet sponsors can drive the adoption and growth of the intranet, as well as play a key role in resolving any issues associated with the relationship of the intranet to other information systems and projects.

☐ Determine an appropriate authoring model

There are three main authoring models:

• Centralised authoring. Source material is provided to the intranet team, which publishes and manages all content.
• Decentralised authoring. Individual business units are provided with tools for authoring and maintaining their information.
• Hybrid authoring. Most authoring is done by business units, while a central unit is responsible for overall quality control and strategic intranet management.

The specific needs of the agency will determine the model chosen.

If decentralised or hybrid models are chosen (where business units are involved in authoring content), rather than acting as a ‘gatekeeper’ the intranet team can coach and mentor business units. In this case, activities to be undertaken by the intranet team would include providing training, resources, tools and other support for business authors. Note that intranet teams may wish to review their composition and skill set in order to take on this coaching role.
CHECKPOINTS

DESIGN AND CONTENT

Quality design, structure and content of an intranet are key to ensuring that it is an effective tool for users.

☐ Apply user-centred design techniques

An intranet should be easy and efficient to use for all users, regardless of their level of IT literacy. To meet this goal, agencies may consider following a user-centred design approach. This includes a focus on usability and involving stakeholders (including users) throughout the design process. It may also be useful to test prototype designs with users.

Further information about user testing is available in Better Practice Checklist 3, Testing Websites with Users.

☐ Schedule regular evaluation of the intranet

Following the launch of the new (or redeveloped) intranet, regular usage monitoring and evaluation can help ensure that the site remains effective despite changes in both intranet content and the business environment.

Further information about evaluation methods is available in Better Practice Checklist 11, Website Usage Monitoring and Evaluation.

☐ Incorporate ‘killer applications’ and make the intranet a place for ‘doing things’

Services or applications that are used frequently and particularly valued by staff, ‘killer applications’, generate greater use and awareness of the intranet and other resources it comprises. Examples of ‘killer applications’ may include staff directories and phone books, and access to the employee leave system.

By providing facilities such as online forms, applications and calculators, the intranet can be a ‘place for doing things’. By integrating directly into core business processes, the intranet can become a tool that can deliver concrete and measurable business benefits.

☐ Ensure high-quality content

The primary purpose of most intranets is to provide staff with the information they need for their roles. Unless the information provided is consistent, accurate, comprehensive and appropriate, staff will seek the information from alternative sources.
Consider the most appropriate structure for the intranet

Intranets structured along organisational lines (where each unit publishes its own information in a separate section) may prove difficult for some staff to find the information they require.

Consider structuring intranets according to task and subject, recognising that many activities involve multiple areas of the business. For example, booking an interstate trip may involve information from Finance, Human Resources and other areas of the organisation.

Use of information architecture techniques will help determine the most appropriate structure for the site. Further information is available in Better Practice Checklist 15, Information Architecture for Websites.

Establish content review processes

Content on intranets, as with websites, can quickly become ‘stale’. Processes to review all intranet content on a regular basis can help ensure that it is still up-to-date and accurate. Some content may require more frequent review than other content. Review processes can be automated, such as through the use of a content management system.

Ensure that the intranet meets accessibility standards

Intranets, like other government sites, are required to be accessible by disabled users and users of assistive technology. These requirements have been outlined by the W3C Web Accessibility Initiative (WAI) www.w3.org/WAI/.

Consider recordkeeping issues

With intranets playing an increasingly important role within agencies, the need for keeping records of intranet content is correspondingly important.


Consider implementing a content management system

A content management system (CMS) can support the ongoing development and maintenance of (especially large) intranets. The deployment of a CMS will also support the use of a decentralised authoring model.

If a CMS has been implemented for the external website, it may be possible to use this for the intranet. The specific business requirements for the intranet may be considered as part of the evaluation and selection of any CMS for the external website.

Further information on CMSs is available in Better Practice Checklist 9, Selecting a Content Management System and Better Practice Checklist 10, Implementing a Content Management System.
COMMUNICATIONS AND CHANGE MANAGEMENT

To maximise the potential of the intranet, potential users need to be informed about what it can offer and about how use of the intranet can be integrated into workflows.

Communications and change management activities may be part of managing an intranet throughout the intranet’s lifetime, and not just part of the initial implementation.

Build trust in the intranet

Staff are more likely to use and support the intranet if they have confidence in its content and management. Staff may trust the intranet if they feel that:

• content is complete, accurate and up-to-date
• the intranet will continue to be viable into the future
• it is worth devoting time learning how to use the intranet
• the intranet is being supported and taken seriously by senior management.

Market the intranet

The following activities can generate awareness and interest in the intranet amongst potential users.

• **Name the intranet.** A naming competition can be used to determine a suitable name, with the added benefit of generating awareness and knowledge of the new (or redeveloped) site.

• **Establish clear intranet branding.** This can help distinguish the intranet from the corporate website (or other web-based resources) and can meet both internal marketing and usability goals.

• **Develop a communications plan.** This outlines the ‘message’ about the intranet that will be conveyed, who the target audiences are, and how and when they will be contacted. The internal communications unit should be able to assist with the development and implementation of this communications plan.

• **Other promotional activities.** Many (and varied) methods are used by agencies to promote their intranet, including:
  – intranet launch and birthday celebrations
  – giving presentations
  – emails linking to intranet
  – automatically loading the intranet home page
  – gimmicks and novelties (various)
  – staff training and staff induction.

For further information about marketing the intranet within the organisation, see *Better Practice Checklist 20, Marketing E-government.*
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