Secrets of SharePoint Intranets

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Introduction: Michal Pisarek

- Founder of Dynamic Owl Consulting
- Product Director at Bonzai Intranet for SharePoint
- 5 X Microsoft SharePoint MVP
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- Twitter: @michalpisarek
What We’re All About

**DYNAMIC OWL**

We combine the best business and technical skills to provide pragmatic SharePoint advice to our clients. We build beautiful and functional Intranets based on business needs and create useful collaboration solutions driven by how our clients work and what they do.

**WHAT WE DO**

- SharePoint consulting services
- Microsoft Gold Partner
- Bonzai SharePoint Intranet
- End to End SharePoint Implementations

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WHAT IS BONZAI?

THE SHAREPOINT INTRANET WITH BUSINESS SENSE.
Today’s Agenda

01 What is an Intranet or Portal?
02 Intranet Components and Information Architecture
03 Planning and Implementation
04 Best Practices
What is an Intranet or Portal?
An internal web site that helps employees get things done

Thought Farmer - Vancouver
What is a better question?

"What types of issues and opportunities would you like your Intranet to solve?"
What can Intranets do?

- Provide trusted information
- Deliver internal communication
- Foster staff engagement
- Promote organizational culture
- Streamline business processes
- Knowledge Management
- Find people and expertise
- Access to common documents
- Access to tools to do my job
- Anywhere access
- Help in on/off boarding

What is an Intranet?
What type of information do Intranets have?

<table>
<thead>
<tr>
<th>News</th>
<th>Events</th>
<th>Calendars</th>
<th>Policies/Procedures</th>
<th>Forms</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stock Information</td>
<td>KPI’s</td>
<td>How Do I’s</td>
<td>FAQ’s</td>
<td>Employee Spotlight</td>
</tr>
<tr>
<td>Important Announcements</td>
<td>Employee Directory</td>
<td>Location Directory</td>
<td>Tools</td>
<td>Templates</td>
</tr>
</tbody>
</table>
Intranet Pillars

- Content and Communication
- Tasks and Tools
- Social and Engagement
- Collaboration
What is it

“An Intranet allows you to centralize, organize and control your organizational content”

Benefits

Find content quickly and easily, be able to control that content effectively

Examples

Web Pages, Policies, Procedures, Templates, Safety Documents, Department Information
Communication

What is it
“An Intranet provides a centralized communication medium to the organization”

Benefits
Alignment of message, transparency, ease of publishing, content targeting

Examples
News, Events, Employee Spotlight, My Company in the news
Tasks

What is it
“An Intranet provides the mechanism to perform common tasks in a streamlined fashion”

Benefits
Ease of task access, centralized task area, single platform

Examples
Forms, Policies, Procedures, How Do I’s, FAQ’s
What is it

“An Intranet provides access to tools that help employees achieve a goal or objective”

Benefits

Speed, Efficiency, transparency of tools available

Examples

Finding people, calculators, search, links
Social

What is it
“An intranet where all employees can author content and connect easily as well as use social tools for business value”

Benefits
Transparency, engagement, two way dialogue, capturing corporate memory

Examples
Comments, Likes, Tagging, Employee Profiles, Praising, Working Out Loud, Yammer
Engagement

What is it
“An Intranet allows you to engage employees and make them feel part of the organization”

Benefits
Employee performance, retention, accelerating change

Examples
Innovation Centers, Polls, Photo of the Day, Marketplace
Collaboration

What is it
“An Intranet provides the ability to start to collaborate within the organization”

Benefits
Central launch off point to collaboration activities

Examples
Calendars, Team Site Directory, Document Management
Components and Information Architecture
What is Information Architecture?

"Information Architecture is the art and science of structuring, labelling and categorizing content."
Information Architecture on Intranets

Navigation

Page Structure

Labels
Intranet Navigation

• Most common area of difficulty for organization
• It does not matter how great your intranet is if your users cannot find anything on it!
• There are lots of best practices and research out there to help you on your way!
Intranet Navigation

News and Events
- Communication mechanism to the organization
- Categorization of both news and events is critical

Employee Resources
- Payroll, benefits, career related materials
- Can be either stored within Intranet or links to other systems

How Do I..
- Common list of tasks from a user perspective
- Allows for a common area to guide users

Tools and Resources
- Selection of external or internal tools/applications
- Calculators, links to other systems, policies, procedures

Support Services
- Departments or services to help employees do their job

About
- Company based information such as history, governance
- Can also store business and department based information

Norman Neilsen Intranet Design Annual 2014
Organizational Specific Topics

• Engineering
  • Research, Knowledge

• Banking and Finance
  • Products, Services, Serving Clients

• Energy and Mining
  • Safety, Reporting, Going To Site

Don’t design your Intranet around your organizational structure

Don’t use “cute” labels
  • Policy Pagoda, People Place can be misunderstood
Intranet Navigation Best Practices

• Don’t organize your content around your organizational structure
• Don’t use cute labels
• Think from a task or content based approach
• Understand what your users are doing and how they look for information
• Start with less top level categories as opposed to more
How will I know that people will actually be able to find content on my Intranet?
Information Architecture Testing

- How do you actually know that people are going to be able to find content on your Intranet?
- How do you know that your navigation makes sense?
- Use the same tools that are used out there in the Web!

Image: IA Areas of Practice

Users + Context + Content = IA

Professional Development? Balance your strengths by exploring other areas...

Of course there’s overlap in these skills and roles. Where does card sorting fit in - under Users or Content? The important thing to remember is that we’re a multi-faceted bunch and that it’s a rewarding experience to explore outside your own area of expertise as you develop your career.

IA Practice Model ©2001 Louis Rosenfeld LLC, Diagrams ©2003 Jess McMillan. All rights reserved.
Card Sorting

- Helps us understand how users group related information
- Best Practice approach in User Centered Design
- Great to determine navigation items and content categorization
- Take a subset of content
- Have users categorize them into categories that make sense to them
Tree Testing

- Used to evaluate the find ability of topics in an Intranet
- Test navigation against a set of common user tasks
- Best way to determine if your navigation will actually work before your users start complaining
Impression Testing

- Shows where users think that content should reside based on tasks
- Low fi way to test structure of an Intranet before development
- Great results and engagement from participants
Valuable Intranet Homepages

**News**
- Providing the most visible face of the intranet as an internal communications channel

**Navigation**
- Both to core corporate information, and to information specific to individual business units or geographic regions

**Key Tools**
- Helping staff in their day-to-day work, or to complete administrative tasks.

**Community and culture**
- Helping to foster a sense of identity, reflecting the nature of the organisation, and building engagement

**Internal Marketing**
- Offering business units and projects a space to communicate important updates or recently releases.

**Collaboration**
- Providing both an entry point to collaboration functionality, and surfacing activity within collaboration tools.
Intranet Homepages

- Usually a mix of Communication, Social and Task Based

- Communication
  - News
  - Events
  - Announcements

- Social
  - Photos
  - Buy and Sell
  - Cafeteria Menu

- Task/Transaction
  - Links
  - Forms
  - Self Service/Quicklinks
Planning and Implementation
Intranet Planning

- Define Vision & Success
- Requirements Gathering
- Information Architecture
- Visual Design
- Governance
- Roles & Responsibilities
- Content Audit
- Content Authoring & Migration
- Roll Out Planning
- Planning and Implementation
Wireframes

- A picture tells a thousand words
- An interactive prototype tells more 😊
- Get wireframes in custom hands early and iterate often
- Don’t use Visio
- Example Tools:
  - Balsamq
  - Axure
  - InVisionApp (awesome)
Visual Design and User Experience

- Your Intranet should be beautiful and represent your company
- Making SharePoint look nice is terribly difficult and expensive
- If you are using a designer make sure they understand SharePoint
Content, Content, Content!

• The biggest cause of delays in Intranet projects
• Content doesn’t magically appear on your Intranet so make sure that you have a plan
• Start content planning very early in your Intranet project
Content Ownership

- Defines who owns the content and also other roles such as Author and Reviewer if applicable
- Does not have to be done for every piece of content however should be performed for the most used and valuable to the organization
- Once generated it should be signed off by relevant stakeholders

<table>
<thead>
<tr>
<th>Content Type</th>
<th>Description</th>
<th>Location</th>
<th>Owner</th>
<th>Author</th>
<th>Reviewer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Policies and Procedures</td>
<td>All P&amp;P’s within the organization</td>
<td>/pandps and departmental sites</td>
<td>Department Authors</td>
<td>Department Authors</td>
<td>Compliance</td>
</tr>
<tr>
<td>Forms</td>
<td>Central forms areas</td>
<td>/forms</td>
<td>Compliance</td>
<td>Compliance</td>
<td>Compliance</td>
</tr>
</tbody>
</table>
Content Review Lifecycle

- Content on your Intranet should be periodically reviewed to ensure that it is up to date and current.
- This part of the governance plan establishes the review cycle, if any, of different types of content on the Intranet

<table>
<thead>
<tr>
<th>Content Type</th>
<th>Description</th>
<th>Location</th>
<th>Responsibility</th>
<th>Review Cycle</th>
</tr>
</thead>
<tbody>
<tr>
<td>Policies and Procedures</td>
<td>All P&amp;P’s that are centrally organized, please note this does not include department specific P&amp;P’s</td>
<td>/pandps</td>
<td>Compliance</td>
<td>Yearly review cycle for all content</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Monthly review of updated content</td>
</tr>
<tr>
<td>Forms</td>
<td>Employee Spotlight items that appear on the home page</td>
<td>/empSpot</td>
<td>Human Resources</td>
<td>2 X HR Generated Stories Per Week</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1 X Employee Sourced Per Week</td>
</tr>
</tbody>
</table>
Content Publishing Schedule

• Defines who will be responsible for publishing content on the Intranet, the type of content and the frequency of update
• Aligns expectations around how much content will be produced on your Intranet and most importantly who will be responsible for producing it

<table>
<thead>
<tr>
<th>Content Type</th>
<th>Description</th>
<th>Location</th>
<th>Responsibility</th>
<th>Publishing Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Corporate News</td>
<td>News that is centrally distributed and published within the organization. Appears on the home page</td>
<td>/News</td>
<td>Communications Intranet Team</td>
<td>3 X Corporate Articles Per Week</td>
</tr>
<tr>
<td>Employee Spotlight</td>
<td>Employee Spotlight items that appear on the home page</td>
<td>/empSpot</td>
<td>Human Resources</td>
<td>2 X HR Generated Stories Per Week</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1 X Employee Sourced Per Week</td>
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Questions and Answers
Wrap-up: Contact Details

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Merci à nos commanditaires !
SharePint !

Ce soir à 18h

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