



The Intranet Buyer's Guide

INGENIUXX
Content beyond boundaries

Contents

Why This Guide?	5
What Makes Successful Intranets	6
Social Intranets	12
Beware the Intranet in a Box	13
Why Digital Offices Are Only One Piece of the Solution	14
What About SharePoint?	15
How to Buy Intranet Technology	16
Avoiding Typical Intranet Buying Mistakes	19
Our Best Advice	21

Intranets play a number of important roles in today's enterprises and can create competitive advantages when tools and related processes align well with your organization. It is important to understand your objectives and research software options carefully before you invest what is sure to be considerable amounts of time and money into a new platform.

The first question to answer is, "What is an intranet?" Many definitions exist, but most industry experts consider an intranet to be a key component of a broader hub of collaboration, knowledge management, and communication services. Those services can include customer communities, employee onboarding resources, employee directories, company and group calendars, knowledge bases, customer portals and partner extranets.

An intranet is a key component of a broader hub of collaboration, knowledge management, and communication services.

Keep in mind that there are many adjacent technologies and notions here, such as extranets and social communities. The primary difference is that intranets are typically designed for internal use, while extranets are most widely used for sharing and collaboration with third parties.

Social or community intranets may serve a vastly different purpose than traditional intranets and extranets, as they tend to focus more on social interactions, collaboration and “working in the stream,” as the saying goes.

Because the definition of intranet is so fluid, analysts often differ on their individual assumptions and requirements, and on how they evaluate them in their research. Some analysts may use phrases such as “enterprise social networks,” “digital workplace” or other terminology to describe the ever-evolving concept of intranet technology.

No matter what terminology or definition you employ, it is clear that intranets have evolved into critical enterprise infrastructure, and most commonly serve as a bridge connecting employees and information – and increasingly real-time streams of collaboration activity.

Why This Guide?

This paper is designed to guide your selection of intranet technology, provide you with some critical perspective on the market and help you avoid many of the typical buying mistakes.

When You Need an Intranet

There's a common belief in the software industry that the most successful procurement projects are based on use cases. You can think of use cases as the application of software tools towards a specific user group in your company, for a specific operation or work scenario. If we look at intranets, the most common use cases usually revolve around six things:

- Content aggregation
- Employee self-service
- Human Resources
- Knowledge sharing
- Social sharing and collaboration
- Team collaboration

If you're trying to solve technological challenges in any of those six areas, then some form of intranet technology is almost certainly part of the answer.

Intranets are indispensable and useful across the spectrum of company sizes, purposes, and sectors.

Why? Because digitized information has had a dramatic impact on the working environment and production process. As a result, almost every company could benefit from tools to manage information sharing and collaboration. In fact, it can drive real productivity gains in the information workforce.

You may also need an intranet if you're struggling with unmanageable silos of information that are spread around your enterprise. Consider that the enterprise's work environment has become a series of silos that sequester information. Intranets, when done right, are silo busters.

CIOs and CEOs need to understand that email is not sufficient for getting business done – at least not in a competitive way – and that their key business assets are most likely dispersed around the enterprise, helter-skelter, on the department servers, individual workstations and the countless smartphones of both employees and contractors.

What Makes Successful Intranets

Before you buy the actual intranet product (we'll walk you through that process in the next chapter), let's look at the topic of intranets in more detail.

Document Storage, Sharing, and Collaboration

First and foremost, an intranet is your company's "golden record" content repository, where you centrally store, manage and distribute your enterprise information assets, including PDF documents, PowerPoint presentations, MS Word memos, maybe even images, photos, and videos. An intranet enables you to eliminate those infamous mapped network drives and other fragmented services that disperse information and ultimately make it harder to find and less manageable.

The first step towards intranet success is to use it as your central content repository.

As this first step implies, information governance is a key part of any intranet project's scope. But first, we'll focus on the software component, and how it can make your intranet successful.

Effective collaboration and sharing of information is another important element of a successful intranet. Are your employees able to comment on documents, as well as see and track versions? Do you find your employees relying excessively on email or using Dropbox, Google Docs or another cloud-based application?

Are your employees trying to circumvent some of the inefficiencies you may currently have in your organization by using their personal email or file sharing account? How do you make sure the information that leaves your firewall remains secure as it winds its way through your employees' personal accounts and devices?

By making sure your intranet is your firm's central (and secure) content repository, you should be able to begin centralizing knowledge, collaboration and sharing activities.

Your goal is to have it all in one place, on one platform, behind a firewall, and under secure conditions. Achieving this is a significant step towards intranet success.

Top Down Administration and Publishing

Most organizations have employees across the company that can contribute content to the Intranet, but you want to enable them to do so in a controlled manner to ensure content is findable. A structured content model with clearly defined content types and metadata tagging is necessary to ensure you create content in a consistent, reusable manner.

Most Intranet solutions lack the workflow and publishing capabilities, as well as a structured content model required for professional enterprise Intranet.

If you want to empower departments and teams to manage their own content, look for an Intranet that provides the robust content management capabilities required to support the creation, editing and publishing of content by a large number of employees across departments and teams.

Notifications and Activity Streams

Notifications and activity streams are great ways to engage your employees and keep them informed of the company's activities.

It's not enough to expect employees to come to the internet. Instead, try methods to encourage interaction and activity, bringing the intranet to the employee.

By syndicating information and notifying users, you can encourage more participation in the intranet.

Email notifications and activity roll-ups, SMS messages and mobile notifications are a great way to reach out to employees. By allowing employees to follow topics, work areas or documents, and receive notifications when items of interest are changed, you empower employees to stay more engaged with your organization's knowledge.

Don't want to overwhelm already busy people? A modern intranet should allow you to configure communication cadence and, for example, generate activity roll-ups that are sent weekly by email.

Search and Findability

Without great search functionality, chances are your intranet will never be successful. It is an imperative that your employees can find information as quickly and easily as they do when conducting a Google search.

From the point of view of information organization and Information Architecture (IA), the intranet provides an official taxonomy for the way the organization conceives and organizes its information. With taxonomy, the information becomes findable.

Search is often the most useful and widely used form of navigation.

This is especially true when there are lots of assets, and they are spread out across various sections of the intranet.

Intranet search should provide the following capabilities:

- Search web content and documents and show relevant keyword matches and highlighted text.
- Perform a federated search across external databases, file systems, and websites.

- Filter search results based on employee access level and permissions.
- Provide the ability to do a faceted search to narrow or expand search results based on keywords, category, content type, age and other metadata.

Given that search is often the primary method people use to find content, and that most employees are not technical enough to create complex search queries, the capability to have faceted and guided search is a critical aspect of a successful intranet.

Spend time making sure that search works as your users will use it. Prioritize this functionality.

Directory, Profiles and Membership Management

Employee directories provide quick, easy access to all employees and contractors. They give users the ability to manage their profiles, while the IT ensures that membership management is secured and access is appropriately granted. A profile is essentially a personal page that allows employees to share their contact information, their professional experience, qualifications and areas of expertise and even some of their social activity.

The directory can be viewed by entire intranet community or categorized based on departments, locations, product lines, etc. Information appearing on the directory list view is dynamically pulled from the user's profile page.

Calendaring and Events

Most employees tend to rely heavily on calendaring in organizing their work activities. Intranets can provide company and personal calendaring capabilities to keep users up-to-date on events within the organization, their department or their own daily schedules. With centralized calendars, you can schedule meetings, post company holidays and keep track of important dates. Events can be viewed by department or on a master calendar for the entire organization.

Like search, calendaring is a key functionality. Make sure that intranet-based calendars integrate easily with your existing calendaring environment. Don't expect your employees to adopt a new approach. Instead, make the centralized resource a seamless add-on to existing services and client applications.

Forums and Message Boards

Intranet forums and message boards provide a collaborative communication space. Intranet users should be able to create forums by departments, projects or categories, and post comments and follow other users' comments in one thread. In addition, you can deliver forum updates to users via email notifications or activity streams, so they can follow and re-engage with important discussions as desired in near real time.

Integration with Office 365 and Google Apps

Your Intranet is not complete if it doesn't integrate with your productivity tools. Your office is likely using Office 365 or Google Apps, the two most popular productivity suites available. You spend much of your time working in these tools creating documents and other content.

Some of this content you want to make available from the Intranet, either to all employees or specific groups or teams. In your activity streams, you might want to link to a document to let others know they can review and collaborate on it. For

time tracking, you might want to link to a spreadsheet with detailed activities for each client. In forums and message boards, you may want to let others know of new whitepapers, articles, or templates you are developing so they can read or comment on them.

There are many reasons you want to connect your Intranet to your productivity tools. Together these two tools create the digital workplace your employees use to do their work, collaboration and stay in touch with what is happening across the entire company.

Time-tracking and Reporting

Employee self-service and your manager's ability to easily view and create reports based on data entered by employees – all these are crucial elements in modern work environments.

With time-tracking functionality, for example, site administrators can create projects and keep track of hours as project participants enter them. Managers can view progress through project reports. Users can view their projects, log hours and submit a timecard for approval.

Groups, Roles, and Permissions

Look for intranet tools that can provide sophisticated mechanisms for security management, including groups, roles, and permissions.

Some vendors offer federated identity functionality that integrates with SharePoint, LDAP, etc. The federated approach is critical. You want to find the most effective solution to managing permissions and groups, and defining roles people may belong to as well as what type of access they may need.

Some vendors offer bolt-on solutions here. Look for a vendor that has a good understanding and technical implementation of a permissioning engine that allows for granular management of permissions and access.

Make sure to recognize that every organization typically has a permissions model in place, and your intranet solution will need to integrate natively and flexibly.

Automation, Application Development, and Business Process Modeling

The most successful intranets are applications for streamlining business processes.

Many great applications that automate activities and allow you to engage in business process modeling lie in the foundation of an intranet. From standard services like PTO requests to expense reimbursement to more complex business workflows and project management, the more actionable business processes you put in the intranet, the more ROI and overall engagement the intranet will deliver.

Automating business processes at the most basic level means getting rid of paper forms and static PDF documents, and moving to web-based forms processing. If you already have software tools for managing business processes, then the intranet can act as a portal providing secure access to external applications and single sign-on capabilities.

Mobile Access

Mobile access has become one of the most critical features for any Intranet implementation. While many employees

work in the office, there are an equal amount or more who work offsite. Employees work from home, travel, or spend a lot of time going from client worksite to client worksite, and it's rare to find any employee who doesn't use a mobile device for work.

A modern Intranet provides a responsive framework for enabling mobile access. It should include tools to easily create pages that are mobile-enabled by default. This includes mobile-enabling all the core features mentioned above, and any additional features such as those mentioned in the Social Intranets below.

The Intranet should be able to detect the device and display the appropriate interface. Some Intranet solutions may enable you to preview your Intranet on a mobile device so you can see how your Intranet will look and work.

Cloud Ready

Many employees work remotely and need an easy way to access the Intranet where they have central access to the information and tools they need to do their job. An intranet available via private cloud is easier to access regardless of where the employee is or what device they are using.

Social Intranets

The previous section covered the core features and functions that make up a successful intranet, but let's take it up a notch and look at another flavor of intranets – the social intranet. Social features may or may not rank high on your list of priorities, but considering these things now will enable you to spot some important differentiations among the intranet software vendors.

In the modern working environment, employees want and expect user-friendliness from their business applications.

They expect the intranets to be as easy to use as Facebook. It doesn't necessarily mean they will be using the intranet recreationally, but it does mean that, like it or not, social intranets are now held to a high standard of usability and functionality as they are inevitably compared to Facebook.

Social networking on the intranet is a way for the enterprise to enable employees to follow/share/like/comment with their colleagues, subject matter experts, working groups and topical interest areas in a casual,

real-time manner. Providing a personalized “News Feed” for each employee in the intranet allows people to easily stay up-to-date with new information and connect with important colleagues.

From simple status updates to presence indicators to document and content updates, social activity streams are among the most powerful ways to drive user engagement in a modern intranet.

As a word of caution, don't be too quickly seduced by slick looking social intranet solutions. Make sure you evaluate any platform in the context of your core intranet functionality requirements. Purely social tools often lack maturity across the spectrum of enterprise functionality.

The social element is fun and engaging, but a hyper fast, federated search engine, mature security model and flexible integration with other enterprise infrastructure may be more important to the success of your project.

Beware the Intranet in a Box

There are a few Intranet solutions on the market that claim to provide an “Intranet in a Box.” They offer a standard set of features and can be implemented very quickly. It may seem like a good idea to implement a solution like this. But ask yourself: Do they allow you to grow?

If you have external systems you want to integrate, if you want to customize workflow or governance guidelines for different types of content or different sets of authors and editors, if you want the flexibility to

start with one approach to managing a centralized news center and then modify that approach to support contributions from a wider group, then it’s likely these types of solutions are not the right fit for you.

Enterprise Intranets require the flexibility to customize the solution to meet specific requirements and growing needs. An “Intranet in a Box” is not able to provide this flexibility.

Why Digital Offices Are Only One Piece of the Solution

You might think that Office 365, Google Apps, Box or Dropbox for Business is all you need as an Intranet solution. But these tools provide only part of the capabilities you need for a modern Intranet. These productivity tools help you create, manage and collaborate on documents, but they don't provide the ability to create, manage and publish editorial content, and many don't offer the additional features found in Intranets solutions such as workflow and governance, social capabilities, time reporting, and process automation.

Document and collaboration solutions like Office 365 also do not provide an Intranet homepage that provides a central employee experience for all company related information.

Editorial content such as news, events and other communications often require multiple content creators and reviewers, as well as the need to follow defined publishing schedules.

Today's Intranet must provide a full featured digital workplace which includes not only document collaboration, but also web content management, integration of information and data from other systems and the ability to search across all information to give a single set of search results.

What About SharePoint?

Many organizations also look to SharePoint as a complete Intranet solution. While SharePoint is a fine “out-of-the-box” tool for managing team sites and creating lists of documents, it can be challenging to manage, and many people find that it lacks agility.

One common issue is that SharePoint is somewhat of a misnomer. For most organizations, SharePoint is used in the plural, with each department and organization running one or many SharePoint sites which are disconnected.

In global or company-wide collaboration scenarios it is important to bridge the individual content silos with a unified set of services and information access. Strategists often look at a tactic humorously named the “enterprise octopus” – a strategy to connect multiple “federated” repositories with a collaboration layer that “talks” to all of the silos beneath the global intranet. That can quickly get as messy as it sounds.

While SharePoint may provide some time-to-value for document collaboration, and the latest version does provide some new features for creating and managing news and communication, it still takes a

decentralized approach to information delivery. To make it an Intranet that takes a company-wide view requires customizations that take time and effort. Any early gains in time and value can be lost as you struggle with broader development, integration and governance issues.

Additional SharePoint challenges are scaling the intranet for high performance and supporting geographically dispersed organizations.

The bottleneck for scaling becomes the MS SQL Server database, which is often used to not only store data but also documents and files, which in intranet solutions implies very large datasets. Under higher traffic scenarios you must move to a SQL Server cluster and then jump to more database server hardware and more expensive SQL Server licenses. Most organizations that run large SharePoint deployments encounter database scaling challenges.

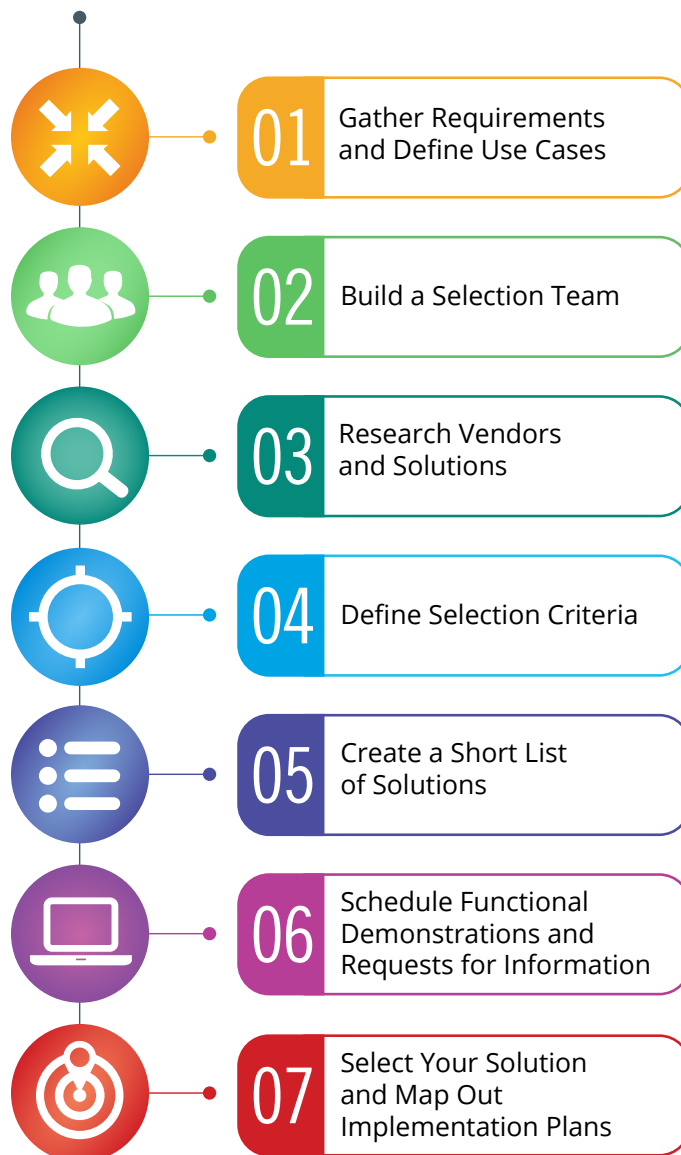
Should you run SharePoint as your entire intranet? This question is often answered through its fitness for your priority use cases (discussed in the next chapter) and your internal technical capabilities.

How to Buy Intranet Technology

Now that you know what to look for in an intranet package and what scenarios you might want to identify in your organization for this particular software project let's look at some of the industry's best practices on buying intranet technology.

A typical process for buying this type of technology involves several steps.

HOW TO BUY INTRANET TECHNOLOGY



Gather Requirements and Define Use Cases

Usually, in the beginning, you'd want to examine your intranet needs and figure out what exactly you want your intranet to be and to do. The use cases we described earlier in this document should aid you in figuring out the various ways you will use your intranet, as well as the various target groups of your users.

Build a Selection Team

In your intranet selection project, you want to include stakeholders from multiple departments within your organization, spanning across HR, legal, marketing and sales, IT, business, etc. All relevant stakeholders should be included and should have a say in the selection of your new intranet software.

You do not need to include your entire organization, but creating a limited and representative sample of employees who can vocalize their current needs is a great idea. These stakeholder interviews should then inform your vendor evaluation process.

Once you have a selection team identified, you should work towards building a short list of candidate software vendors.

Research Vendors and Solutions

You are sure to find a number of different players in the marketplace: from CMS companies that also sell an intranet solution to social collaboration vendors to pure-play intranet software vendors. You want to make sure you research the marketplace to understand its different segments and where your perfect candidate might be. This process will educate you on the various features and functions that exist in the different types of products, how the market is currently organized or defined and help you understand where the bleeding edge of innovation is.

Define Selection Criteria

Along with use cases, you should define key technical and functional requirements. Dig deeper than "easy to use" and "has a robust search." You can start looking at such notions as cost, ROI, support, integration capabilities, technology stack, device support, etc. With that, you can define some key criteria, assign weightings for each one and use this tool to narrow the field of choice.

Create a Short List of Solutions

Moving from a larger set of vendors to a smaller one, also known as creating a “short list,” should bring you closer to the desired state of technologies you seek for your intranet project. And finally, after meeting those short-listed vendors in person or on a call for demonstrations, discussions and getting to know each other, you can move onto selecting the finalist.

Schedule Functional Demonstrations and Requests for Information

Once you have assembled an evaluation team, defined your key requirements and selection criteria, and completed preliminary research for suitable solutions, you should schedule functional demonstrations with vendors and ask for more detailed information about the capabilities in the form of a request for information or “RFI.”

Successful RFIs are relatively short and itemize the key requirements and vendor background information. The key is not only asking “if” a vendor supports a key requirement, but “how” the vendor supports the requirement.

Depending on your budget, you should also consider a “paid proof of concept.” This approach involves working with one to three vendors to implement a handful of top priority use cases, carefully monitoring how hard it is to achieve your goals and then getting your selection team to grade the final outcomes.

Demos can be deceptively impressive. But actual proof of concept exercises are hard to fake.

Select Your Solution and Map Out Implementation Plans

After following some version of the steps outlined in the previous section, you should be able to select a finalist of choice for your next intranet project.

Along with vendor selection, you should keep in mind who will provide implementation services, or whether you also need to select an implementation partner to substitute or supplement your internal IT team.

Avoiding Typical Intranet Buying Mistakes

Buying enterprise software is never an easy journey. In this section, we offer some of the common pitfalls to avoid in your next intranet software selection and procurement project.

Not Evaluating Scalability, Extensibility and Integration Points

So, you like your finalist vendor and the software it has to offer in terms of its features and functions. The next thing you need to be comfortable with is its ability to effectively integrate with other platforms in your technology stack. Remember, you want to try to avoid the silos as much as possible.

Remember, your intranet should serve as a portal to other areas within the business and be a silo buster.

Ask your vendors about their integration points, pre-bundled packages, and APIs. You may find that many platforms are technologically “ancient” and difficult to integrate with. The last thing you want to do is to rewrite your applications to work

with the intranet. But what you do want to do is look at customization and integration as getting “out-of-the-box” features to integrate existing applications and develop new solutions.

Your intranet is a business-critical application, so scalability is important. You need to consider your vendor’s ability to easily scale on commodity hardware with low footprint architecture. For you, it means less IT overhead as you grow and lower total cost of ownership. Of course, if you’re considering cloud-based solutions, this may be less of a concern.

Not Considering Permissions, Security and Identity Management

We touched on the topic of roles, groups, and permissions in one of the previous sections, but this topic certainly deserves a revisit. Make sure to investigate your vendor’s security management strategy before signing the dotted line.

If applications live outside of the intranet, what is the Single Sign-On and portal access strategy? Is SSO even available? Can I get from my intranet securely to Taleo to make a job request, or to Salesforce.com to file a case, or to JD Edwards to do a parts look-up?

These are the types of questions you should be asking your potential intranet vendor. Remember that effective permissions, working groups, and asset sharing is key to a successful intranet.

Not Paying Attention to Mobile Access and Delivery

Employees do not always work from the office. Make sure your intranet is easily accessible from your employees' homes and virtual offices, including planes, trains, and automobiles.

Often, the best mobile strategy for an intranet is a hybrid approach. That is, using responsive design to provide a fallback mobile experience and then enhancing key tasks and capabilities using adaptive approaches.

Disregarding Your Vendor's Product Release Cycles

Intranet software is fairly conservative in relation to some other categories, but you should still consider your vendor's pace of innovation, how often updates are released and how they take customer ideas, qualify them for the product roadmap and eventually implement them.

Does your vendor release via an agile monthly process, or a quarterly or annual waterfall approach? Try to understand how long you might wait for your new favorite feature to come along. Ask your vendor to show you examples of the user community requesting functionality and then it getting released. Did that take months or years? What was the pathway?

This goes hand-in-hand with a general evaluation of your potential vendors, and making sure you understand their licensing model, reputation, credibility, quality of service and customer support.

Our Best Advice

Before you jump into evaluating intranet vendors, do your homework and evaluate your organization, your requirements and your existing processes. Figure out your goals and the objectives of your social intranet project. Determine your timelines, resources, and budget. Think about how you will staff this project throughout its different stages – from research to vendor evaluation to selection and implementation. If you already have an intranet technology in place and will be replacing it with new software, evaluate your content and related processes and think about your content strategy, your migration strategy and how you will implement the new intranet to gain the most benefit for your employees and to establish that collaborative framework you always wanted.

Consider your organizational culture and how this change will affect your organization. Consider implementing change management strategies that will allow for a more seamless transition in this process, while supporting your employees. Make sure to include your key stakeholders (IT and HR, for example) in the process from the very beginning. This will ensure executive buy-in, user adoption, and selection of a proper tool.

Intranets can be a vibrant social hub for organizations, particularly in today's business world where many organizations need to collaborate across national and international locations. With the rise of telecommuting and an increasingly remote workforce, and with the omnipresence of social networking tools changing employee expectations, the intranet has never been a more important tool.

Your intranet should become the central community that informs and engages your organization. Build a great one, and it can be transformational for your company.

About Ingeniux

Ingeniux is the leading provider of web content management and digital experience software. We enable organizations to orchestrate the entire customer experience from acquisition through to sales to support and service, across any device, application, or website.

We build content management software with an unparalleled focus on the content itself. The Ingeniux CMS is designed to manage and deliver modern websites, customer support portals, online communities, and other customer touchpoints.

We believe in intelligent “structured” content. We design our software to enable content reuse, enable true mobile and multi-channel content delivery, and insightful content discovery. Our unique content-as-a-service capabilities deliver content into web and mobile applications, and other key channels.

Ingeniux software is available as a fully managed software service or an on-premise application. Ingeniux delivers unparalleled service and support to customers worldwide.

To learn more, visit us at <http://www.ingeniux.com>.

INGENIUX

1601 2nd Avenue, Suite 1010
Seattle, WA 98101

info@ingeniux.com
877 445 8228