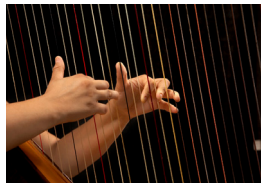# global intranet trends 2011

Jane McConnell

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Preface

2010 was a transitional year for intranet management.

Intranet-related responsibilities are gradually being integrated into job descriptions for business and other managers. Decentralized governance frameworks are giving central teams a more strategic role while at the same time giving regional, country or business managers greater autonomy and account-ability. These are all extremely positive signs for the future of intranets.

Intranet managers are forming large communities using external social media, getting support from peers around the world and gaining visibility for their roles and work. 2010 has seen fast growth in intranet-related groups in LinkedIn where multiple discussions take place 24 hours a day. Twitter has become a fast-moving source of information about what's happening in the intranet space. The hashtag #intranet has many tweets every day with lots of conversations, links and ideas being shared. Many more people blog about intranet matters than 12 months ago. A dynamic, virtual, global intranet community exists, and is getting stronger every day.

However, in some organizations, the intranet may be losing momentum as collaborative and social media features are being implemented and end up competing with the intranet. There is an urgent need in many organizations to define new, global strategies for this expanding online workplace. Whatever you call it - "workplace web" or "digital workplace" or something else - it is now business critical to define strategies that ensure that these different pieces work together and bring value to business.

2010 was a also a transitional year for the Global Intranet Trends report. Over the last 5 years, it has become a unique reference in the intranet world. 2010 saw record-breaking participation from 440 organizations around the world. This year's report focuses on what "leaders" are doing. It will help you define your strategies and build business cases based on evidence: facts, figures, analysis and firsthand learnings from intranet managers around the world.

I hope you will find this report relevant and useful for your work. Please get in touch if you have questions, comments or would just like to "talk intranets".

Jane McConnell

NetStrategy/JMC

EXECUTIVE SUMMARY

The Global Intranet Trends report is unique. Based on an annual worldwide survey now in its 5th year, it provides in-depth insight into what is happening in the "intranet world" inside organizations.

Started in 2006 with 100 enterprises, survey participation has quadrupled to 440 organizations head-quartered in Europe, North America and Asia Pacific. Many have participated in the survey for several years.

They include some of the largest companies in the world with over 100,000 employees along with smaller organizations with fewer than 1,000 employees. They come from private, government and humanitarian sectors.

The survey participants, all of whom have intranet management roles in their organization, answered an online survey of over 100 questions.

Five megatrends are re-shaping the intranet and impacting how people work:

1. The intranet is becoming the **front-door** into the "workplace web" (the overall landscape of content, services, tools and applications people need to do their jobs).

2. The intranet is becoming more **team-oriented**, as project and collaborative spaces are being integrated.

3. The intranet is becoming **people-focused**, as its scope is expanding to include internal networking and social media.

4. The intranet is enabling people to communicate in near **real-time**, through web-conferencing, micro-blogging and other tools.

5. The intranet is **place-independent**, letting people access it from outside the physical walls of the enterprise, and through mobile devices and smart phones.

These five trends were first identified in 2009 and have been reconfirmed by the 2010 data.

Leaders are renewing their strategies and transforming the intranet into a platform that energizes business and people.

Leading organizations merit close observation because there are a number of points where their strategies differ from other organizations:

- Decision-making for the intranet is defined: who makes decisions, who owns what, and how people are accountable

- The intranet, collaborative spaces and social tools and platforms are more integrated.

- Top management has made the intranet part of the objectives of the management team.

- Social media is deployed more widely internally and has gained a certain maturity. Responsibility for social media is part of official job roles.

Organizations and digital teams face two major challenges in 2011:

- How to engage all key stakeholders and make the intranet the "natural" way to work.

- How to integrate the social dimension into intranets and ensure that it brings business value.

An over-arching strategy for the intranet, collaboration and social media is a pre-requisite for ensuring a coherent and effective "workplace web".

An essential step is to define and implement a governance framework that mobilizes the key players. This work must take place with an eye on the big picture and not be limited to the old scope of the intranet.

This report provides evidence and shares good practices as described by the organizations themselves.

Highlights - a 10-page overview of facts and figures around the key learnings.

What leaders are doing - a 65-page presentation of facts, figures and charts showing a detailed view of what leaders are doing differently.

New intranet management - a look at how the role of intranet management is changing, specifically the impact of social media on this role.

Reference information
- Descriptions of the three stages of intranet maturity
- Lists of the megatrend indicators
- More information about the participating organizations, the survey's network partners and NetStrategy/JMC.

HIGHLIGHTS

A brief overview

- 5 megatrends affecting intranets today

- The impact of social media

- The two key challenges facing digital teams in 2011

THE NEW WORKPLACE & THE INTRANET

Five megatrends were identified in 2009. They force a new view on intranets and on what people and businesses need.

1. The front door into the workplace web

The intranet taking on the business role of being the door into the "workplace web". The workplace web is the ensemble of information, collaboration and communication tools, business applications as well as personal and professional networking environments people use to do their jobs.

- "Business needs" and "productivity" are the number two intranet strategy drivers after "communication".

2. Team-oriented

The intranet is becoming more "collaboration-friendly" than in the past.

- 10 % of the organizations say their entire intranet is collaborative; 20 % have integrated collaboration into the intranet; 40 % have linked their collaboration spaces to the intranet.

3. People-focused

The intranet is becoming a place where people can comment directly on published content, connect to others and build networks and communities.

- Social media is now present inside 70 % of the organizations.
- Wikis and blogs are found in 55 % of the organizations. This is an increase of 10 percentage points over the last 12 months.
- 30 % of the organizations have ideation programs. (Structured approaches to generating ideas for improvements directly from employees.)

4. "Real-time"

The intranet is becoming a platform for near "real-time" communication, accelerating the speed at which people communicate and business is done.

- Social networking is present in 22% of the organizations either enterprise-wide, in limited deployment or in pilots
- Micro-blogging (e.g. Twitter, Yammer) is found in 26 % organizations, either enterprise-wide, in limited deployment or in pilots

5. Place-independent

The intranet is now extended beyond corporate walls and beyond the computer. Remote access and mobile optimization are making the intranet available when and where people need it.

- 90 % of the organizations say it is technically possible to access the intranet from home and 30 % say that for many employees, working from home is "a common practice".
- 25 % of the organizations are planning or currently running pilots to optimize their intranets for access by mobile devices such as smart phones.

Exhibit 1.

Some organizations are leading, others are lagging.

Five dimensions: leaders compared to others
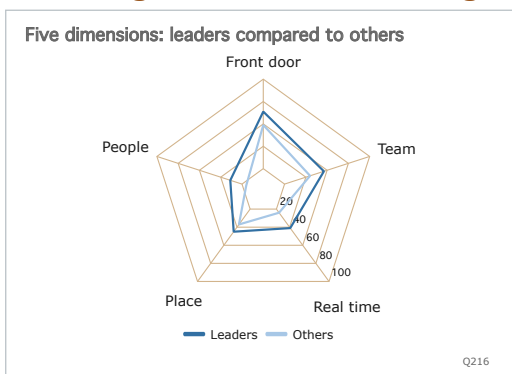
The chart illustrates the five megatrends. Each megatrend is composed of a group of indicators from different questions in the survey. Points are allocated to the indicators and averages calculated for each megatrend. (See page 85 for details.)

The two lines show the difference between "leaders" and "others". The leader group represents 145 organizations or one third of the 2010 survey population.

Leaders show significant differences when compared to the other organizations in the survey. They tend to be approximately 20 percentage points higher.

The purpose of the second and largest section of this report is to look at what leaders are doing differently in their workplace webs and intranets in terms of

- Content, services, social features offered
- Measurement of intranet and social media value
- Governance and decision making
- Roles and responsibilities, management and policies
- Accountability and embedding the intranet into "business as usual".

(See the table of contents for a detailed list of the points covered in "What leaders are doing".)

IMPACT OF SOCIAL MEDIA

The perception of value from social media is primarily in "soft benefits".

Fewer than 20 % of the organizations using social media actually measure or are attempting to measure the value brought by social media. Nearly 50 % intend to measure later.

From 60 to 65% of those with social media say "yes, absolutely" or "yes, quite a lot" when asked if they have observed benefits in these areas:
  • More effective knowledge-sharing
  • Better informed employees
  • More engaged employees

From 30 to 40 % say the same for the following areas:
  • Increased cross pollination and innovation
  • Faster problem-solving and decision-making
  • Decreased use of email
  • Emergence of previously unrecognized experts

Business-related concerns diminish as experience is gained; others remain.

Three types of concerns about social media decrease as the enterprise gains experience:
  • Doubts about the value to the organization
  • Relevancy to business
  • Risk of employees wasting time

Concern about some issues does not decrease with experience:
  • Findability of information produced through social media tools and channels
  • Security of information
  • "Language silos"

It takes at least 3 or 4 years for social media to become established in an organization.

20 % of the surveyed organizations have social media either "well-established enterprise-wide" or "well-established in some parts". 40 % of the organizations have social media initiatives on-going for 2 years or more.

Most organizations report that people's interest and involvement in social media are growing slowly. Only a few say that "the fun, new factor has worn off and people are less interested".

Senior managers are not setting an example.

Senior managers blog in 35% of the organizations. However, many of the blogs seem to be one-way publications rather than true blogs with comments and conversations. While half the senior bloggers write their own posts, only 33 % allow employees to post comments.

Social media management is a new role in the organization.

40% of the organizations have social media responsibility, internal and/or external, included in one or more job descriptions. It is usually one responsibility among others.

This role is relatively new: in 65% of the organizations, it has existed for one year or less.

Governance models are beginning to converge responsibilities for intranet, collaboration and social media.

Governing models combine responsibility for the intranet, collaboration and internal social media in different ways:

- 50 % of the organizations include responsibility for internal social media in the intranet management role.
- 30 % include both social media and collaboration.

The two key challenges for digital teams in 2011

Governance and engaging stakeholders

If the intranet is to become the way of working, it is essential to have the active involvement of all key players in the organization. This requires defining an appropriate governance steering framework in order to mobilize high-level stakeholders.

Governance is a steering framework that defines strategic goals, decision-making, accountability, and procedures for reconciling differences. (It is not to be confused with management which refers to how governance decisions and principles are put into practice through guidelines, rules, processes, editorial policies, standardization, and so on.)

Governance of the intranet requires defining a number of points that require agreement among the stakeholders:

- How the intranet should support the business: specifically who it should serve and how.
- How it fits in the workplace web and relates to the other applications and services including collaboration and social media.
- The responsibilities and roles of the stakeholders.
- How the intranet will be embedded in the organization's processes and activities.

Without agreement, there are likely to be "black holes" in the organization, places where the intranet is absent or failing. This creates confusion and frustration for people and reduces the business value of the intranet.

The challenge is to identify appropriate governance principles for the organization, to include all the right people in this decision-making process, then to invest the time and energy required to transform the principles into reality.

The intranet is a cross-organizational platform and as such, top management has the ultimate responsibility for setting the tone.

- In only 12 % of the organizations, top management sets intranet-related objectives for their management teams.
- In fewer than half the organizations, high-level stakeholders (Directors of HR, Communication, IT and other support functions) are expected to deliver their services to employees using the intranet.

Facilitating the social dimension

Social media is triggering fundamental questions about intranets and their role in the organization. Enterprises are being forced to clarify their strategies for communication, collaboration and "doing business internally".

The intranet and project and collaboration spaces have traditionally been on separate platforms, with different "doorways". Collaboration is now moving into the intranet, potentially bringing the worlds of "information" and "collaboration" together.

Today, the arrival of social media is bringing a third dimension into play. Where does social networking fit? Is it a new layer that fits neatly with the rest or is it an additional platform for people to understand and use?

The fundamental issues to address are:
- What positioning and scope are given to the intranet, social media and collaboration platforms and tools? How do they fit together?
- How can business needs, expectations from people, and organizational needs and constraints be met?
- How can social features serve the processes of the organization? How to best engage stakeholders who are often the process owners?
- What is the balance right between corporate guidelines and local initiatives, between individual empowerment and accountability?
- What is the right balance between top-down strategy and bottom-up initiatives when it comes to social media?

This is new territory for everyone. Organizations are looking for ways to leverage socially-driven information and transform the energy and networking potential triggered by these new tools into business value.

(Technology strategy and choices are outside the scope of this report.)

WHAT LEADERS ARE DOING

A subset of 145 organizations has been qualified as "leaders". This represents one third of the 2010 survey population of 440 organizations. These enterprises have one or more of the following characteristics:

- **The intranet has become the "way of working" for the organization, that is to say essential for people to do their jobs.**
  This is defined as Stage 3 for intranets. (See page 84 in the Reference section for descriptions of the three stages.)
  49 organizations in the 2010 survey meet this criteria, representing 11 % of the full population of 440 organizations.

- **Top management sets intranet-related objectives for the senior management team.**
  Lack of senior management ownership of the intranet has long been an obstacle that holds intranets back from achieving their full potential. As recently as in 2009, 60 % of the participants considered it an obstacle. Organizations where the top management has made specific intranet-related matters part of the objectives for their management team are on the leading edge when it comes to high-level governance and stakeholder engagement.
  51 organizations in the 2010 survey meet this criteria, representing 12 % of the full population of 440 organizations.

- **Social media initiatives inside the enterprise have become "well established" either enterprise-wide or in some parts of the organization.**
  The scope of intranets has expanded significantly over the past couple of years to include social media. Organizations with some degree of maturity in their use of social media are leaders in many ways even if their intranets are not at Stage 3.
  83 organizations in the 2010 survey meet this criteria, representing 19 % of the full population of 440 organizations.

It is worth noting that only four of the organizations meet all three criteria. Another thirty meet two out of the three criteria.

The following pages contain charts showing how "leaders" and "others" compare on numerous points covered in the survey.

Contents

Participating organizations: profiles

Exhibit 71.
Sizes of organizations

Size of participating organizations
Number of employees

Over 100,000
35 (8%)

From 50 to 100,000
39 (9%)

From 30 to 50,000
47 (11%)

From 15 to 30,000
40 (9%)

From 5 to 15,000
86 (20%)

Under 1,000
80 (18%)

From 1 to 5,000
113 (26%)

n = 440   Q5
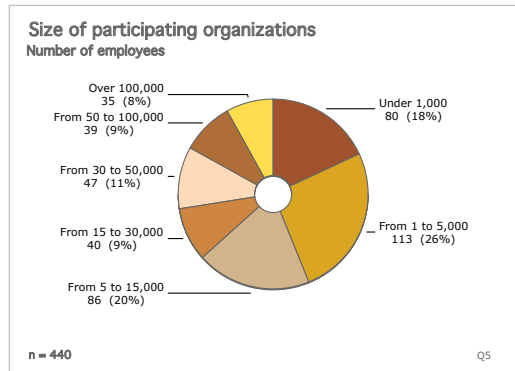
Exhibit 74.
Types of organizations

Type of organization

Non governmental
15 (3%)

Extraterritorial
12 (3%)

Association
13 (3%)

Mixed public-private
20 (5%)

Public
107 (24%)

Private
273 (62%)

n = 440   Q109
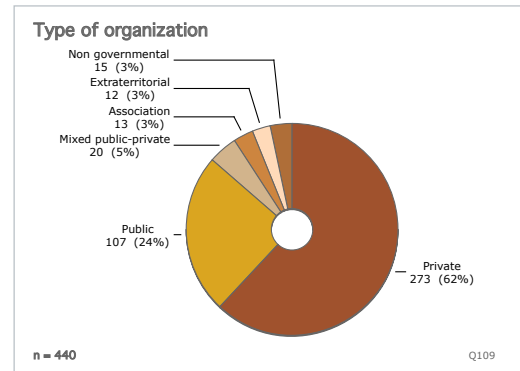
Exhibit 72.
Worldwide participation

Organization headquarters location

Africa
2 (0%)

Asia Pacific
65 (15%)

Central/South America
3 (1%)

North America
124 (29%)

Europe
238 (55%)

n = 440   Q4.5
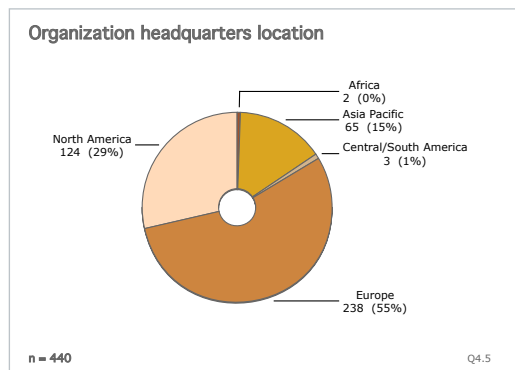
Exhibit 75.
Wide range of sectors

Primary areas of activity

Services	26%
Financial	19%
Healthcare	14%
Administration	11%
Technology	11%
Industrial goods	10%
Consumer goods	10%
Utilities	9%
Education	8%
Basic materials	5%
Humanitarian	4%

n = 440 - multiple answers possible   Q110
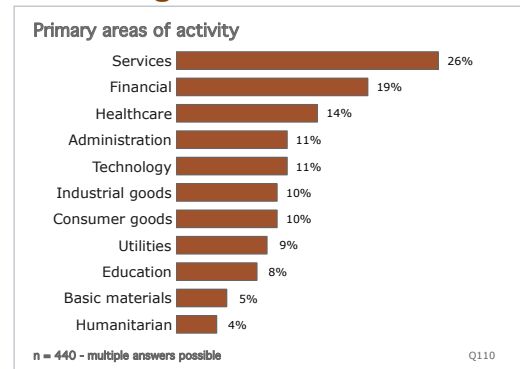
Exhibit 73.
Participant functions

Function or department of respondent

Communication	193
IT	101
Knowledge Management	39
Marketing	32
Information Management	18
Human Resources	17
Administration	3
Finance	2

n = 440   Q107

Exhibit 76.
Global footprint

Global footprint of participating organizations
Number of countries

Over 100 countries
36 (8%)

51 - 100 countries
50 (11%)

20 - 50 countries
62 (14%)

4 - 20 countries
79 (18%)

1 country
168 (38%)

2 - 3 countries
45 (10%)

n = 440   Q108
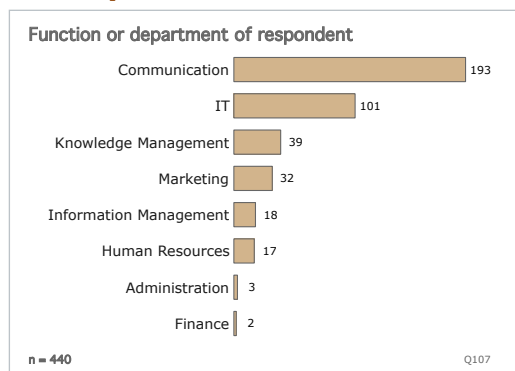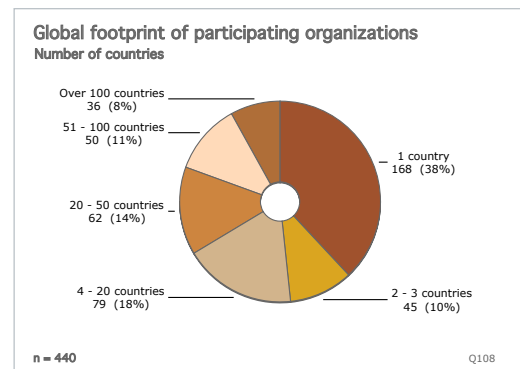
About NetStrategy/JMC

NetStrategy/JMC has been helping some of the world's largest organizations transform their intranets since 1998. The NetJMC experience and collaborative approach are unique in the industry today. It is based on long experience and models & methods developed over a wide range of consulting engagements for global corporations, UN organizations, and large companies in the process of going global.

These engagements focus on defining intranet strategies and governance models that align with business needs, fit the organization's culture, obtain stakeholder buy-in and win executive support.

Information and references are available on netjmc.com/clients.

American based in Grasse, in the South of France, Jane has a working base in Paris and travels to client locations primarily in Europe and North America.

Jane gives private Executive Briefings for organizations on the latest trends in intranets. She is also a frequent speaker at intranet and enterprise 2.0 events.

- Blogger since 2005 at "Globally Local & Locally Global" netjmc.com/blog
- Creator of the largest Linkedin group dedicated to intranet managers. Nearly 600 members worldwide as of October 2010. (www.linkedin.com/groups?home=&gid=1360277)

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More information

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