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How to take your intranet from a maze for the masses to just-for-me communication

In the final installment of our three-part series on intranets, Stacy Wilson looks first at how to best use new portal and content management technologies through sound segmentation strategy. Then, she delves into how the changing face of the intranet has affected communication strategy.

We should have seen it coming. From our dark position in DOS and text-based Internet, the light revealed a remarkably fast, flexible and easy way to communicate with the masses. Like greedy, hungry beasts we grabbed at what we could reach and understand, mastered it and blew our messages out there as if over a megaphone. But that wasn't enough. We grew more sophisticated as we used the new tools. So we questioned, pushed for answers and solutions, envisioned something more relevant to individuals.

Sounds like a medieval fantasy, right? In reality it was probably some marketer who realized over his fifth cup of coffee one day that the web could deliver exactly the content his target wants when she want it. It was the grail of tailored communication. The dollar signs were palpable. But such a notion also represents opportunity for organizational productivity.

In previous articles, we've explored other Intranet strategy elements: measuring your Intranet in ways that connect it to the business; governing your Intranet using sensible processes and roles that offer the optimum in flexibility and support. Still, there are two lingering questions:

1. How can we ensure that Joe's Intranet truly enhances his productivity, while delivering tools that enhance Betty's productivity even though her needs are completely different?
2. How does a personalized and customized Intranet change our communication culture and what does that mean to the communicator?

These are two important elements to consider when building your Intranet strategy. Should you fail to consider them, you will likely never realize the full potential and value of your investment.

It's all in the code, baby

Called segmentation, the process of grouping and defining profiles for individuals is nothing new to a good marketer. But those who work with internal audiences are loath to group employees. "It feels like discrimination," some say. If delivering a better user experience is discrimination, then I'm Bill Gates.

Content management software and portal navigation have made segmentation a "must do" – otherwise you can't really take full advantage of their capabilities. Content management is a way to store pieces of a web page such as content, visuals and links, and dynamically load them into templates for an individual user. Portal is the front-end interface that pulls that all together for the individual in a well-organized and flexible view.

If I'm an engineering manager in Toledo, my home page gives me information on my team, my local benefits and my division's goals – all based on a profile of me coded into the software. Most



organizations already know something about their employees, so they can create an initial profile based on my location, my department, my level, etc. Then, they allow me to add to my profile – I want news from the CNN news feed; because I travel all the time, I want links to the travel planning page and the expense reimbursement tool right up front.

You'll hear both the terms *personalization* and *customization* used to define what the employee sees. I've heard them used interchangeably. In my view, personalization is the employees' ability to personalize their own experience, such as the travel link. Customization, on the other hand, is the company using what it knows to build an employee profile that allows delivery of a custom view. Perhaps an easier way to think about these and avoid any mix up is to call them "user-defined" and "system-defined" preferences.

Establishing a strategy that clearly outlines what the user can define, versus what the system can define, is critical. This is individual to the company – some companies prefer to put the onus on the employees to define all their options, while others don't want to rely on the employee's pro-activity. It's your choice. Somewhere in the middle, using some of both tactics, generally is the best.

It is fair to mention at this stage that some of the tools out there also deliver the ability for the system to track an employee's usage patterns and define preferences based on those patterns. This is an implicit system-defined approach. The system is not explicitly asking the user for input, but instead inferring their needs based upon their actions.

Count off

In order to make the best use of system-defined preferences, you must segment your audience. This isn't unlike what a marketer does to deliver customized marketing materials based on the target's personal interests. The approach you take here is vital to the long-term viability of your Intranet. Regardless, keep it simple.

There are three categories most often considered, but most organizations arrive at these plus more.

- Functional or role-based (may look like a departmental list, or may be strictly role based, such as all engineers, not just the R&D department)
- Geographic (try as we might to avoid consideration of geography, this almost always matters)
- Level (e.g., manager, officer, etc.)

Some also identify categories for special programs or committees that come and go. Be cautious about the latter as the more the people change, the more recoding may be required. Special programs, such as all those who participate in your 401(k), often are easier to maintain.

When you build the segments under these categories, ask yourself what is common between the individuals who make up that group. Look for commonalities in the ways they work, the types of applications they use, the content they require, the business tools and theories they use. Build a chart that demonstrates the answers and you begin to see overlap between segments. When that overlap is extreme, collapse the segments. Also, take a reality check and ask yourself questions such as these before you go off and create unnecessary segments:

- Why do we need to have regional segments?
- Since we only have five facilities per region, can't we just pick those five facilities, thus avoiding creation of a whole new segment?



Once the segmentation strategy is clear, you need to determine your segmentation process. How will new employees, transferring employees, or promoted employees accurately get coded into the system so they see the view you want them to see? When such changes happen today most are managed by Human Resources (e.g., salary adjustments, benefits enrollment, etc.). HR may not be the best team to manage the employee portal profile, but they should play a roll to ensure the vital statistics about each employee are accurate.

The important thing to remember is to focus on segmentation as it applies to the people, not the technology. If you allow your technology to drive your decision-making, you may not come out with the approach your people need, and frankly, the big return on investment is in the people.

Moving the communication mindset

Ask your communication peers how they communicate to employees. Do most respond with channels like newsletters, e-mail, managers? Most of us reach for the channels rather than the audience.

What portals and content management systems do is force us to view our communication strategy by audience segments. While it is certainly still possible to communicate with the masses via a portal, do we want to? Given the capability to tailor communication, do we instead want to tailor content and application delivery? Haven't we been yearning for the chance to tailor our messages? Wait, was it the 80's when tailored messaging became all the rage?

Tailoring communication internally begs some important questions:

- What does this mean for communication resources? Do we have the bandwidth to do tailored communication?
- What does this mean for the organizational messages we want everyone to receive, understand and act upon?
- How will employees respond to and engage with information that is truly targeted to their work experience?
- Can we use tailoring to help the employees understand the full value of their relationships with the company?

Tailoring takes considerable time and energy. For example, when you develop content about a new product, you might want to include small modules that relate to specific segments of employees. When you roll out online information about benefits, you'll need to develop content specific to any benefits that differ by location.

With the internal communication processes changing, it is also important to survey the landscape for related changes to the organizational fabric – the culture. Might tailored communication create silos. How might collaboration be affected by our online tools? What else is changing within the organization? Are employees becoming more empowered because we give them greater control over and access to their benefits and compensation information? Or are they instead making faster, but still poor, choices and decisions?

Take all of these issues in consideration and ask lots of questions as you build a future communication strategy. Some key considerations include:

- Restrict use of other channels and avenues when you want the Intranet to be the sole source
- Acknowledge training may be a necessity – even highly educated employees may need some training and training almost always improves your early return on investment
- Develop better integration between e-mail and the Intranet to enhance the user's experience



- Implement quality collaboration tools and watch productivity rise

Finally, you can't expect your new communication strategy to work if you don't create incentives for use and integration. Holding people accountable is much easier when you incorporate measurements into your performance management system. Then you are measuring everyone's behavior, rather than just readership of a newsletter.

Bringing it home

When you construct your Intranet strategy consider the key points this and the previous two articles encompassed:

- Develop clear metrics and return on investment analysis that feed back into the strategy process
- Establish sound governance workflow and a model that defines clear and distinct roles
- Segment audiences to get the most out of your portal and content management system
- Rethink your communication strategy, taking into consideration the process and culture changes the web has and will effect

In another ten years we'll be talking about all this as if it was the Dark Ages. We'll no doubt have new technology that will make what we are using today appear to be prehistoric. For now, revel in our new-found capability and remember that strategy is fluid – it will change with the next big discovery.

Series resources and related articles

"Developing Your Intranet Strategy," Tim Horgan with Dennis Tsu, www.cio.com

"How to Design Usable Web Sites," Human Factors International, 1999, www.humanfactors.com

"Intranet Organization," Steven L. Telleen, Ph.D., 1996, www.iorg.com

"Plan or Die," Toby Ward, January 2003, www.darwinmag.com

"Web Metrics That Matter," Susannah Patton, CIO Magazine, Nov. 15, 2002, www.cio.com