



**Web 2.0 in practice
Open Publish**

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Step Two DESIGNS

About Step Two Designs

We provide vendor-neutral consulting, coaching and mentoring, in the areas of:

- Identifying IM needs
- Developing an IM strategy
- Improving the structure and design of IM systems
- Selecting a content management system
- Applying knowledge management in practice
- Our focus is on providing organisations with the knowledge and skills they need

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Step Two Designs clients

■ ACT Health	■ Department of Family and Community Services
■ AMP	■ Department of Immigration
■ BHP Billiton	■ Federal Court of Australia
■ Blake Dawson Waldron	■ Harvard Business School (USA)
■ Caloundra City Council	■ Hunter New England Health
■ Caltex	■ IAG
■ CHOICE	■ RailCorp
■ Commonwealth Ombudsman	■ University of Melbourne
■ Deloitte (NZ)	■ St John (NZ)
■ Department of Defence	■ UNHCR (Switzerland)

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Key messages

- ECM (including web 2.0) is a process, not a tool set
- There's not one-size fits all solution
- Solve business problems, make the world a better place
- Understanding how people actually work is paramount to success

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How this is going to work

- Use case studies to demonstrate web 2.0 in practice
- Short amount of time, a lot to say
- Auction speed
- I'm around for the rest of the day if you want to talk things through in more detail

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What is information management?

- 'Information management' is an umbrella term that encompasses all the systems and processes within an organisation for the creation and use of corporate information.
- Encompasses:
 - people
 - process
 - content
 - technology

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What is information management?

- Technology, encompassing:
 - web content management (CM)
 - document management (DM)
 - records management (RM)
 - digital asset management (DAM)
 - learning management systems (LM)
 - learning content management systems (LCM)
 - collaboration
 - enterprise search
 - and many more...

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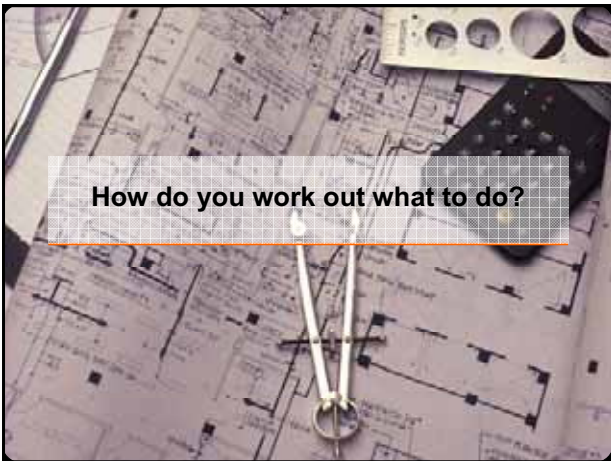
What is information management?

- People and Process:
 - Company culture, business processes and practices that underpin the creation and use of information.
- Content:
 - The information itself, including the structure of information ('information architecture'), metadata, content quality, and more.

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Every organisation is unique

- IM initiatives reflect the organisation served
- Every organisation has unique needs, driven by:
 - nature of the business
 - organisational culture
 - processes
 - staff skills and needs
 - organisational environment
 - size of organisation
- There is no “one-size-fits-all” IM solution



How do you work out what to do?

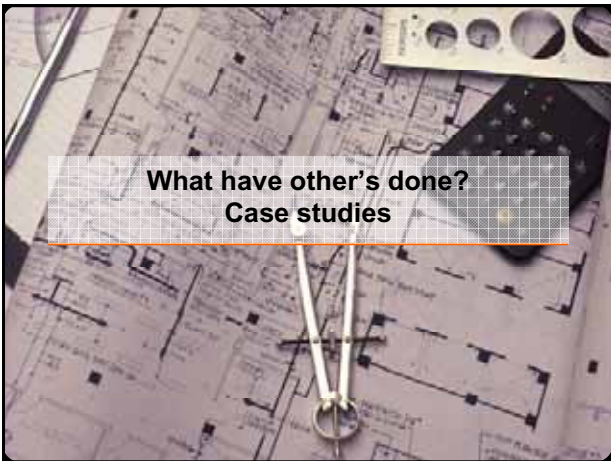
You don't know what you don't know

- Acknowledge that ‘you don't know what you don't know,’ even if you think you already have the answer
- Question everything
- Trust no-one
- Challenge assumptions
- Get out in the business

Steps to knowing what to do

- Identify what is needed
 - needs analysis
 - results in a great list of possibilities....
 - with not enough resources to do them
- Work out what you are actually going to do
 - use the results of the needs analysis
 - take into account constraints
 - use organisational strategy
- Take a leadership role

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Family Law Courts of Australia: background

- Recent changes have resulted in a streamlining of the way family law cases are heard and managed
- A single call centre has been put in place to answer questions from the public
- The call centre does not provide legal advice
- The call centre provides procedural information

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Family Law Courts of Australia: the issue

- Information is contained in huge training folders
- Not useful for the way customer service representatives (CSRs) work
- CSRs have a steep learning curve for first 6 months
- After 6 months want answers to unusual questions

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Family Law Courts of Australia: outcome

- Instant messaging (chat) to get answers to unusual questions
- Socialisation of team
- Team and individual chats
- Chats with associates in court
- Gardening at the end of each day

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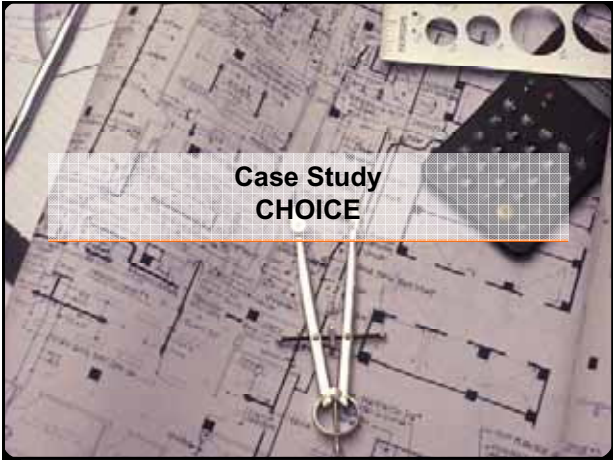


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Making sense of the information

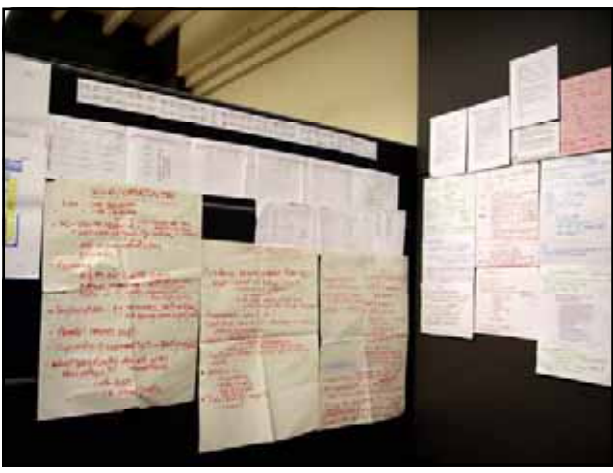
- Work with everything you've collected
- Print out the interviews and read them
- Highlight key information in one colour
- Highlight key quotes in a second colour
- Start to organise the information, group into common themes
- Collate any information that you have been given
- It helps to physically put things up in a room

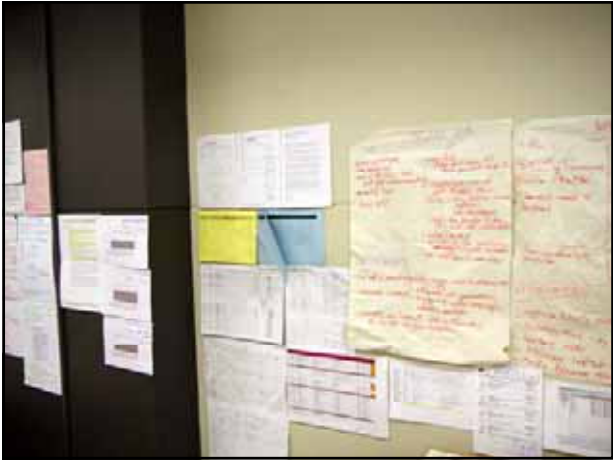
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My office when I am doing this







CHOICE: background

- Policy and advocacy group
- Funded by subscriptions, originally magazine-only, now online as well
- Dated internal processes and systems
- Not meeting publishing industry benchmarks

CHOICE: key systems

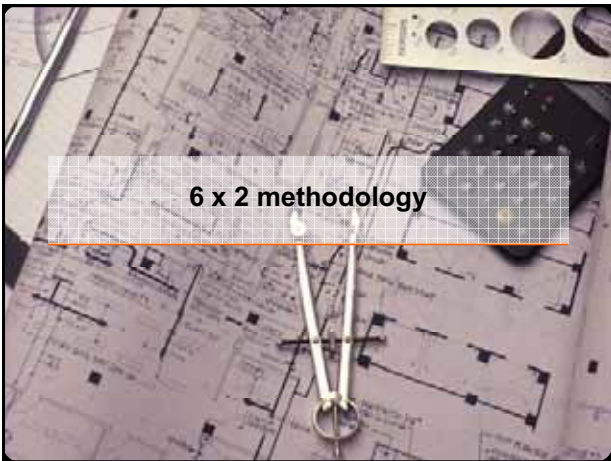
- SharePoint
- Intranet
- CHOICE Online
- Network drives
- TRIM
- Projects database
- MS office suite

CHOICE: the issues

- Speed and real-world reality versus CHOICE quality and reputation
- The role of the consumer, "Is CHOICE the only authority?"
- New systems mirroring old
- I know I don't know, but how do I resolve this?

CHOICE: recommendations

- Information manager across TRIM, Intranet, SharePoint
- CMS for online (and then for the intranet)
- Digital asset management, tactical
- Resolve the question of authority



Too much to be done

- There is too much to do, and not enough resources to do it
- Teams often focus on building the right **conditions** for a successful implementation
- The hope is that the organisation will eventually 'get it'
- Much time has passed, and the organisation is still in the same place...

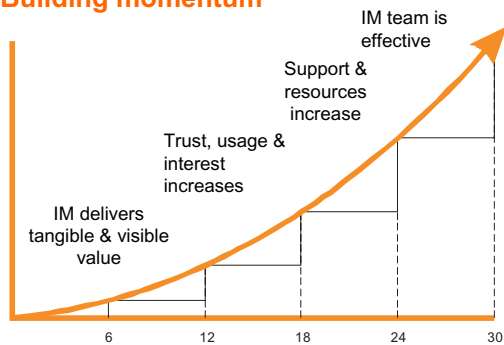
Taking it six months at a time

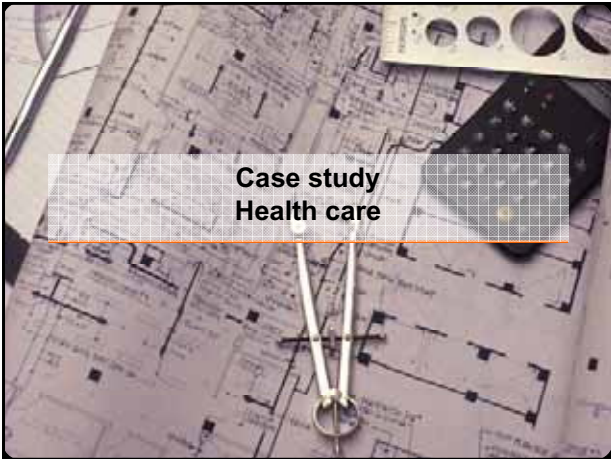
- IM teams need to identify what they can do, and to select activities very carefully
- Focus on the next six months, and what can be delivered in that time
- Choose the activities to grow IM, and build support
- Sketch out the following six months
- Now you have 12 months of an IM roadmap (6 x 2)
- Use this approach to build momentum

How does it work?

- Collate the organisational objectives, as well as those of the IM or intranet team
- Collate the constraints that will impact delivery
- Collate the list of possible activities (from the needs analysis)
- Select the top 6 constraints and objectives
- Assess each activity against these
- Create a project plan

Building momentum





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Healthcare: overview

- Provides high quality telephone-based healthcare throughout Australia and New Zealand
- Large call centre
- Majority of staff work from home
- Built-in support within the applications, online training for core processes but no information management beyond this

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Healthcare: current state

- Fragmented intranet
 - No search
 - Centralised content management
- Difficult to find business critical information
- No overall plan
- Not tied to business indicators and goals
- Information is created in a way that suits owners... but not users

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Healthcare: possible solutions

- Standardise the information architecture
- Provide stewardship in relation to managing information
- Put in place business content owners
- Provide security on some content
- Put in place search
- Move to decentralised content management model
- Find a single owner for IM/ Intranet
- Provide contact details
- Access to call support information
- Real time stats and management tools, including self-measurement for staff
- A reliable system for all operations staff

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Healthcare: possible solutions

- Information presented in the context of the business task it supports
- Role-based view of content
- Socialisation of work-at-home staff
- Focus on organisation of information, including referral information
- Standardise content across regional locations
- Provide access to secure information for team leaders (contact info, nurse registrations etc)
- Integrate operational systems and the intranet
- Put in place document management practices
- Put in place change control on (some) operational practices
- Integrate existing LMS
- Gain detailed understanding of requirement for capability planning

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Healthcare: possible solutions

- Create standards and guidelines for sharing information
- Secure area for sharing reports
- Consider integration with or linking to HR systems e.g. recruitment system
- Revise the contract management process (hard copy and electronic)
- Security role for senior managers
- Investigate ways of carrying out real-time communication to staff
- Revise the process for creating contact information
- Automatically generate addresses

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■ Shopping list of possibilities! And many more on the list

Healthcare: the solution take 1

- Business objectives and intranet objectives
 - Support virtual call centre, work anywhere across the Asia Pacific
 - Spend \$300k by 31st March
 - Easy to use/ simple
 - Saves time
- Constraints
 - \$160k 31st March – end FY06/07
 - Half an intranet manager
 - Deliver within 6 months
 - No CMS, no DMS, limited collaboration (wiki)
 - Centralised content management
 - Program-specific critical information always available

Healthcare: the outcome take 1

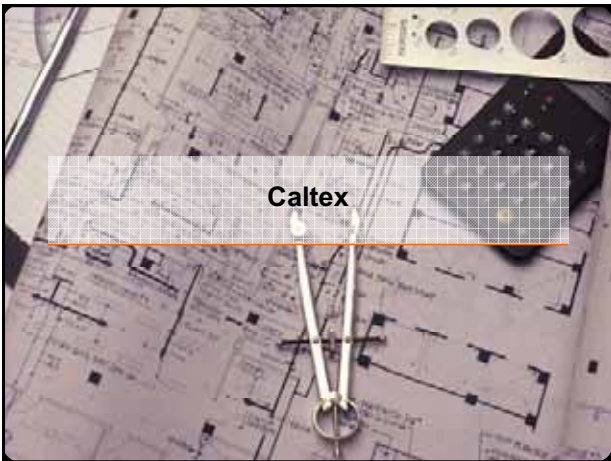
- Put search in place on existing intranet
- Put user metrics in place on existing intranet
- Source new CMS

Healthcare: the solution take 2

- Business objectives and intranet objectives
 - Support virtual call centre, work anywhere across the Asia Pacific
 - Spend \$300k by 31st March
 - Easy to use/ simple
 - Saves time
- Constraints
 - \$160k 31st March – end FY06/07
 - 1 x intranet manager, 1 x developer
 - Deliver within 6 months
 - No CMS, no DMS, limited collaboration (wiki)
 - Centralised content management
 - Program-specific critical information always available

Healthcare: the outcome

- Update/ create new homepages for various operational programs
- Put search in place
- Put user metrics in place
- Put in place distributed content ownership model
- Source new CMS
- Create new Information architecture
- Design new site look and feel



Caltex: overview

- 3,000 employees
- Head office in Sydney, refineries in Sydney and Queensland, Caltex service stations throughout Australia
- Centralising some HR functions into a Human Resources Service Centre (HRSC)
- How to provide current payroll officers with the tools to answer a broad range of HR queries?

Caltex: starting position

- >58,000 documents stored in >6,200 folders
- Duplicate copies, inconsistency, incorrect decisions and advice
- Staff don't know where to find information... even the experts don't know where to look
- Intranet, central content management, Dreamweaver
- 10 weeks to HRSC go-live

Caltex: record daily inquiries

- Every HRSC employee recorded daily inquiries by:
 - Subject area
 - Channel
 - Resolved immediately
 - Time of day
- Helped to organise the information
- Focus efforts on high return areas, gaps in skill set
- 8 key subject areas identified

Caltex: interviewed staff

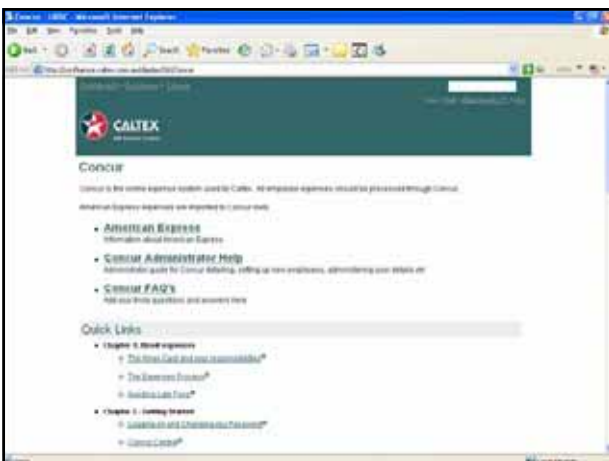
- Interviewed HRSC staff, other HR team members, general staff
- How did they go about doing their jobs? What did they do? What information did they use to do it? Where was it get it from? Where did they really get it from?
- Result:
 - List of specific services for the HRSC to provide
 - Question as to whether the HRSC were on-board

Caltex: the cunning plan

- Common information sets clustered around core HRSC services and inquiries
- Everyone contributes, a 'wiki' approach is defined
- Appoint knowledge custodians for all HRSC supported business processes (knowledge clusters are owned)
- Knowledge custodians work with the business owner to ensure clusters are 100% correct

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Guild Insurance: background

- Insurance company
- Experienced large amount of growth through acquisition
- Valuation June 2000 \$10 mil to \$260 mil now
- Ageing insurance system (business case to replace), lotus notes, no intranet, very limited document management
- Head office in Melbourne, regional offices across Australia, legal, financial and accounting businesses

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Guild Insurance: issues

- Company's IP is its bread and butter
- Point of difference is the relationship with the customer
- Very limited support for remote staff
 - Phone is the only way of providing quotes in the field
- Legal documents require greater control
- Labour intensive processes (due to growth)

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Guild Insurance: Outcome

- A Guild intranet
- Document management
- Not now: collaboration
- Not now: portal

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Leighton Construction: ECM

- Heavy construction company, build highways, railway systems, mining operation, lease equipment
- Pilot of a large content management system covering the business processes part of the business
- What does ECM look like within the business?
- Intranet (portal) built in-house, have document management but not being used, no simple WCM, project management system in place, no overall view of projects

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Leighton Contractors: outcome

- Leverage and improve existing systems
- Governance
- Tactical capability building
 - Digital asset management
 - Simple WCM to complement current portal capability
 - Resurrect old
- Cultural change

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RTA: Motor Traffic Centre

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RTA: Motor Traffic Centre

- What does knowledge management best practice look like
- Major project spanning the next 10 years to upgrade current systems
- New capability required within the new paradigm, particularly around:
 - project management
 - communication
 - general management
 - coordination
 - software development
 - training

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RTA: Motor Traffic Centre

- Information management is the organisation and arrangement of information aiming to facilitate its storage, search, retrieval, and updating
- Knowledge Management aims to accomplish and track processes, procedures and elaborations applied to information, and to document and display the results
- Knowledge Management, maybe later
- Information Management, now

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RTA: existing systems

- File server, shared and personal drives
- Email, Outlook, over-reliance, send and forget
- CARMS, electronic and paper, corporate RMS
- Test Track Pro, defects tracking, web-based
- BSA, Business systems architecture
- Intranet, Team site, corporate info
- Wiki, project management, development
- Clarity, IM&IT tool for managing projects

RTA: existing systems

- No compelling explanation for using wiki
- Wiki being used because intranet expensive (per seat licensing) and not adaptable to business need, not trusted

RTA: wiki ownership

- Put in place IM owner to drive the wiki and any other IM tools
- Not a content publisher
- A leader and a coach that will focus on:
 - Content organisation (information architecture)
 - Search maintenance and labels
 - Governance and rules, including security
 - Training and mentoring for area owners and authors
 - Guidelines, correct content, correct place in the correct way
 - Doing the gardening, or at least getting it done
 - Measurement of systems, search, usage etc

RTA: project management

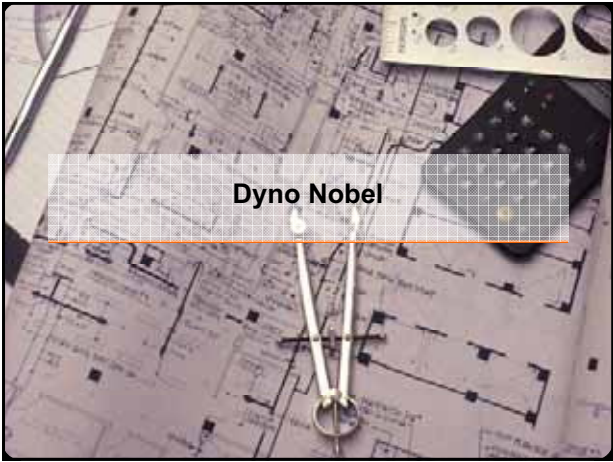
- Systems are already in place for managing projects
- Although a wiki could be used as a team area for projects, the benefit of doing so is not clear
- More of a push/pull mechanism required
- Email is used now, audience expects a prompt
- Project manager blogs accessed via:
 - A browser
 - RSS feed

RTA: possible wiki use

- Develop the wiki around business process-specific areas
- Induction of new project team members
- Software development
- Project prioritisation
- Requirements sign-off (not for managing changes)
- Project start-up procedure

RTA recommendation: Info push and pull

- RSS feeds will help users to keep on top of the things that they need to, including:
 - Project updates where they are a project team member
 - High level project updates from other departments
- Instant messaging deployed to support day-to-day communications one-to-one and one-to-many, for example:
 - As a mechanism to assist an experienced project manager bring a new recruit up-to-speed
 - To enable a project manager to communicate easily with their project team overall, or with sub-sets



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Dyno Nobel

- Early days, however...
- Upgrading from existing IBM portal to IBM Websphere portal and IBM Web Websphere Content Management system (IWWCM)
- Very different, and conflicting business needs
 - Marketing and communications
 - Quick access to applications for new acquisitions

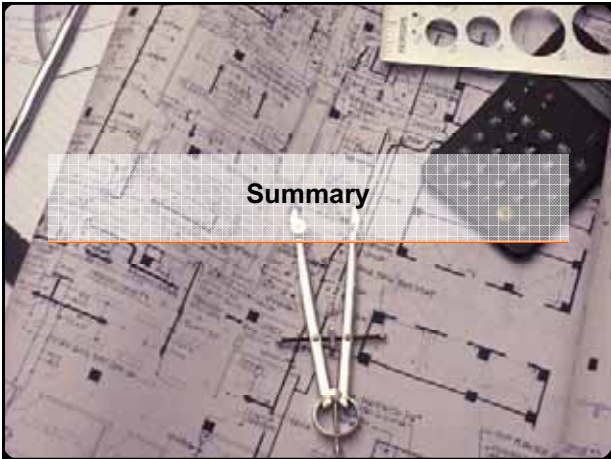
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Dyno Nobel

- May be portal for Lotus Notes and SAP access
- IWWCM used to publish the intranet directly...
- Watch this space to see what happens

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Topics covered

- Case studies to see what others have done
- Use of wiki is popular
- There is a temptation to use web 2.0 technologies for 'the sake of it'
- The best solutions are tied to business process and need
- Ownership and leadership is required if we are to rise above the previous mess that we are seeking to liberate ourselves from

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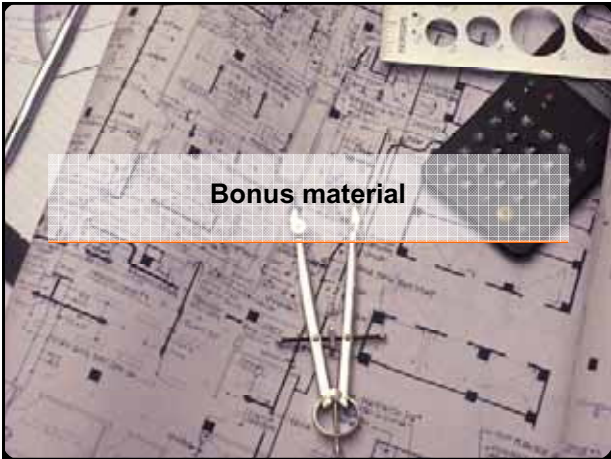
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Questions?

- **Cairo Walker**
- cairo@steptwo.com.au
- Please fill in the feedback form before leaving

- **Website:** www.steptwo.com.au
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- Download many more articles off the site, and read our weblog to keep up-to-date on news, ideas and useful resources

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Bonus material



Ten principles for effective information management

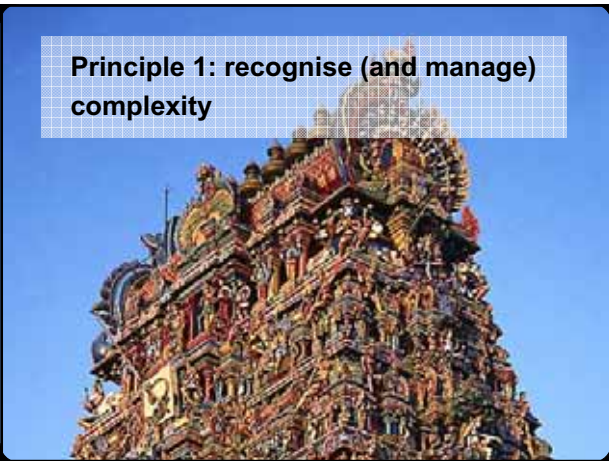
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Ten principles

1. recognise (and manage) complexity
2. focus on adoption
3. deliver tangible & visible benefits
4. prioritise according to business needs
5. take a journey of a thousand steps
6. provide strong leadership
7. mitigate risks
8. communicate extensively
9. aim to deliver a seamless user experience
10. choose the first project very carefully

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Principle 1: recognise (and manage) complexity



Recognise and manage complexity

- Avoid attempting to convert a complex set of needs and problems into simple (even simplistic) solutions
- There is no single technology that should be rigidly rolled out across a whole organisation
- Stop believing “silver bullet” sales pitches from vendors
- Define a clear direction (principle 6)
- Many small activities in parallel (principle 5)
- Identify and mitigate risks (principle 7)

Principle 2: focus on adoption



Focus on adoption

- Systems are only successful if they are actually used by staff
- Identify the “what’s in it for me” factors for end users
- Communicate clearly the purpose and benefits
- Carefully target initial projects to build momentum (principle 10)
- Conduct extensive change management and cultural change activities throughout the project
- Ensure that systems are **useful** and **usable** for staff

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Principle 3: deliver tangible and visible benefits



Deliver tangible and visible benefits

- Improving infrastructure or back-office tasks are important but **invisible**
- Delivering tangible benefits involves identifying concrete business needs that must be met (principle 4)
- When solutions are delivered, the improvement should be obvious, and widely promoted
- Behind-the-scenes improvements should be **paired** with tangible and visible benefits

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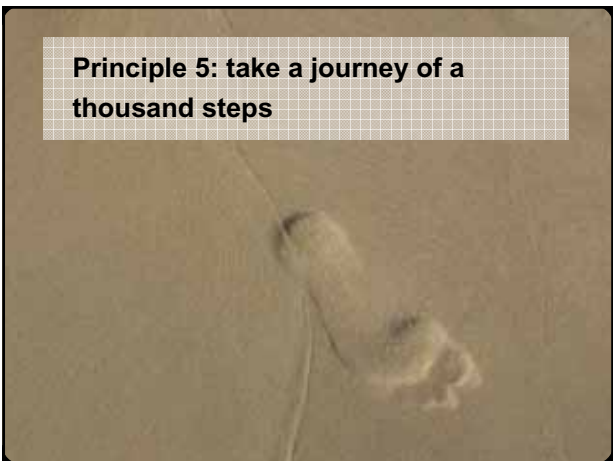
Principle 4: prioritise according to business needs

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Prioritise according to business needs

- Where to start?
- Don't start with the "simplest" technologies, or the "low hanging fruit"
- Instead, identify the most urgent business needs or issues
- These in turn are derived from the overall business strategy and direction for the organisation as a whole
- This will deliver the greatest bang for buck

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Principle 5: take a journey of a thousand steps

Take a journey of a thousand steps

- There is no single application or project that will address and resolve all the information management problems of an organisation
- Let go of the desire for a perfectly planned approach
- Take a 'journey of a thousand steps', often implemented in parallel
- Some changes are organisation-wide, others are at business unit level
- Added up over time, these will have a major impact

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Provide strong leadership

- Successful information management is about organisational and cultural change, and this can only be achieved through strong leadership
- Starting point is to create a clear vision of the desired outcomes
- Effort must then be put into generating a sufficient sense of urgency
- Stakeholders must be engaged to build support
- "Leading Change" by John P. Kotter

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Mitigate risks

- Risks include:
 - selecting an inappropriate technology solution
 - time and budget overruns
 - changing business requirements
 - technical issues, particularly relating to integrating systems
 - failure to gain adoption by staff
- Identify risks at the outset
- Apply risk management approaches
- Eg: spend less money, pilot projects, etc


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Communicate extensively

- Communication ensures that staff have a clear understanding of the project, and the benefits it will deliver
- This is a pre-requisite for gaining adoption
- Develop a clear communications 'message'
- Establish a 'project site' on the intranet from the outset
- With many projects happening simultaneously (principle 5), coordination becomes paramount

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Principle 9: aim to deliver a seamless user experience

Deliver a seamless user experience

- Staff don't understand (or care about) systems
- Staff want a single seamless environment that provides all the information and tools they need
- Deliver a single intranet (or equivalent) that gives access to all information and tools
- Ensure a consistent look-and-feel (and navigation) across all applications
- Provide 'single sign-on' to all applications
- This is a long-term goal, but work incrementally

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Principle 10: choose the first project very carefully

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Choose the first project very carefully

- This project must be selected carefully, to ensure that it:
 - demonstrates the value of the information management strategy
 - builds momentum for future activities
 - generates interest and enthusiasm from both end-users and stakeholders
 - delivers tangible and visible benefits (principle 3)
 - addresses an important or urgent business need (principle 4)
 - can be clearly communicated to staff and stakeholders (principle 8)
 - assists the project team in gaining further resources and support
- Actions speak louder than words

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