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Intranet Development Requires Teamwork

By France Lampron

Before rollout, make sure tech support can handle employee self-service glitches.

Second in a two-part series.

Your company has decided to develop an HR intranet. The project team, which includes representatives from HR, information technology (IT) and management, has chosen the first applications for your new employee communications tool.

Next comes the application planning and development phase. The team must define the audience for various applications and determine each group's needs, then design the applications accordingly. Other key steps include ensuring effective tech support needs, developing rollout strategies and deciding how to use the intranet for corporate branding.

Visualize the Project

The team has determined which functions it will move to the intranet, based on volume, complexity and potential return on investment (ROI). Now consider the audience for each of the HR intranet applications: employees, line managers or HR? The team must address each constituency's set of requirements.

For example, take a simple application such as a change of employee address. The audience for this application is the employee, HR, IT, outside vendors and other internal company resources. The team should look at the paper process in place for disseminating this information to help identify the needs of the different audiences. Also, you should review the reports and interfaces to other systems within the company, and ask why these groups need the information and what they do with it.

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The team should draw a workflow diagram of the application to help identify the audience requirements. For example, for an employee address change function, the diagram should list the audiences and how they currently receive the information. It should highlight the application's action points, such as approving the address change and updating the company's database.

The diagram will help the team visualize an application, determine all of the audience requirements and locate any flaws in the current workflow. It also helps teams focus on the problem. "Too often teams jump ahead to the solution instead of understanding the root cause of the problem," says Linda Koski, senior vice president of Nuvosoft Inc. "By reviewing the change of address workflow diagram, the team can see the problem is that too many people are manually involved in one simple update."

So the team may decide that the employee should enter the address change directly into the company's database, after which the system would trigger e-mail notifications to other audience members.

In a complex application, such as an employee hire or termination, there are more business processes, and additional workflow and approval points. The project team should work through each current business process, such as approving the termination, setting up the exit interview, scheduling a final paycheck and taking care of benefits administration. If any of these processes needs a best practice update, now is the time to make changes.

"Using visual tools such as forms and workflow documents for communication in the project team is extremely helpful," says Julie Boudreau, HR systems manager at IDG. The Boston-based technology media company recently developed an HR intranet. "It allows the team to speak a common language and it speeds the application development process."

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Consider Everyone's Needs

As HR and managers often work together, the project team should consider their needs jointly when developing many applications. For example, in some companies, HR representatives work with a business unit manager and act as the facilitator for all HR-related activities. In other companies, managers handle HR work directly and submit paperwork to HR.

The project team should discuss who—managers or HR representatives—can approve what. It's also important to keep the approval processes simple: The goal of the intranet is to streamline tasks; designing applications with this in mind will eliminate barriers to adoption and use.

It is a good idea for the team to question the necessity and efficacy of the current approval processes. The most accurate information will come from the source closest to it, so the workflow should bring approval or notification closer to the source. This might require thinking differently about the current roles of employees, managers and HR.

One wise action is to re-purpose as many current HR forms on the intranet as appropriate. Employees will recognize the forms and feel comfortable filling them out. This is a logical place to start when developing applications. Electronic forms should also have a similar look and feel to the current paper forms. Familiarity will make the intranet more user-friendly and help ensure its quick acceptance.

Employees will choose the simplest method of making changes in their records. For example, they may try the intranet once or twice, but if it's easier to call or send an e-mail message to HR, then that's what they'll do. If an employee's attempts to use the intranet have been frustrating, it will be difficult to get him or her to try again. Spending the time upfront to make the applications easy to use will go a long way toward ensuring the success of the project.

Develop the Site

After the initial data gathering, the project team should prepare a report that identifies the business requirements and recommends an approach to the intranet applications. Typically, this report will include a site diagram. The report's objective is to define the scope of the application. It sets the stage for the application development, sets priorities and identifies what will and will not be part of the project.

The next process is the functional specifications phase. The developer will produce an application prototype based on the requirements identified in the initial report document. This visual representation will allow the team to see the content, flow, access and rules of the web site. Using the prototype as a walk-through vehicle, the developer will fine-tune the intranet's functional design to the project team's specifications.

After the functional specifications document is approved, the developer will draw up the technical specifications for the project. These include integration with the database, custom routines and table specifications. The developer will use all three pieces—functional specifications, technical specifications and the prototype—to create the final product.

Next comes round after round of testing. Final graphic elements are incorporated, and the team gives final approval to instructions and supporting documentation. Finally, the intranet is ready for employees, if tech support is ready for employees to access the intranet.

Understand IT's Role

The IT department is critical to the success of an HR intranet project. In some cases, IT staff members will design and implement the intranet; in other cases, they will provide technical support and networking services to the HR systems staff. But IT will host the intranet, and, due to the nature of the applications, IT is tied to all of the processes HR will implement on the web.

Having a common communications platform, such as a workflow diagram, is one key to meeting expectations. It's also important that the applications are sketched out, analyzed and decided on with IT before the functional or technical specification is written. This will keep HR and IT in synch with the process and each other.

A worst-case scenario is to leave IT out of the application discussions and then to expect that department to merely implement what the project team has developed.

The IT staff is a wealth of information. They ensure that the project team is making correct assumptions about the data and the technical feasibility of the application. IT knows where all the data is buried. They know how to ensure security and privacy for employee applications, and they know what they can accomplish with the equipment on hand as well as what they will need to purchase.

"Without the involvement and commitment of the IT department, the project will languish," says IDG's Boudreau.

Of course, tech support is key to a successful employee self-service rollout, and that is IT's domain. If your company has an intranet already, the IT department will have insight into issues that arise from opening an application up to the entire workforce.

If not, here are issues the team should address up front:

- What happens when an employee forgets a password?
- How computer literate is the workforce?
- Will a short reference document be enough to help employees log on after they've been trained?
- When an application goes live, is it possible to devote a staff member or two from IT to answer questions?

Introduce the HR Intranet

When tech support issues are resolved, the team is ready to launch the site. The rollout should be fun and rewarding. After months of hard work, the project team can celebrate.

First, work with the company's internal communications or public relations staff to get the word out to each employee. Use the company newsletter, a business unit's newsletter or messages in paycheck envelopes. Display posters. Ask a company executive to send a companywide e-mail message.

Your new intranet is an opportunity for you to reinforce your company's brand. Many companies think of branding as an external exercise, but that's not true. If the internal web site looks completely different from the company's external site, what does that say about the company to its employees? They may think the company doesn't have its act together, that the company cares more about the outside world than its employees or that the company just doesn't know what it's doing.

Work with the marketing communications department to develop the look and feel of the intranet itself. It should be consistent with the company's web site and other external marketing materials.

To help ensure the success of your new intranet, remember to start with a simple application that affects a large portion of your workforce. The team should be able to roll out the new applications within three to four months.

"Today's business environment changes rapidly, and building on short-term success with a project will help the project gain positive momentum," adds Koski.

Following these steps worked for IDG.

"The employee response to the HR intranet has been terrific. Employees comment on its ease of use and its helpfulness," Boudreau says. "While many companies look to the possible ROI involved in developing self-service applications, employee satisfaction is important and very gratifying." HR

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