Company Intro + Intranet Approach

Sara Teitelman, MPH, CEO & Co-Founder

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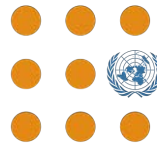**Ideal /State™**

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Trusted Partner to the Social Sector

> " Ideal State has been a true partner to the W.K. Kellogg Foundation in its work to transform the organization and the way it works with and engages partners. Ideal State's strength is their keen strategic vision combined with real get-it-done know-how. "

Ross Comstock
Vice President, Information Systems
W.K. Kellogg Foundation

Ideal State Background

| Founded in	Hours of client work	Successful Projects
2016	**28,000+**	**200+**

Most Common Project Types

- Digital Transformation Roadmap
- Modern Intranet
- M365 Strategy & Adoption
- Knowledge Management Strategy

**Average Client Relationship Length:
24 months
(range 4 mos. to 6 years)**

Microsoft Solutions Partner

Modern Work

Woman-Owned Small Business

Change Management Challenges We Address
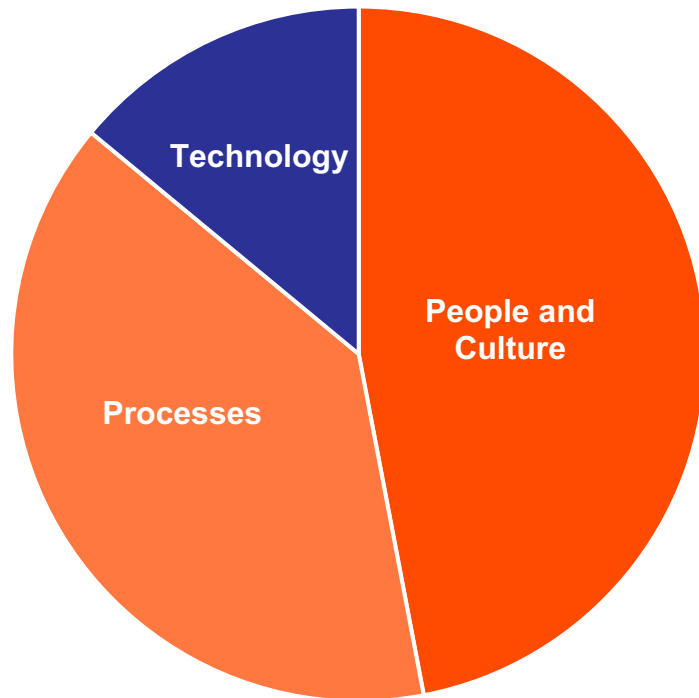
Typical Breakdown of Challenges by Type

Pie chart segments: People and Culture, Processes, Technology

Common Digital Transformation Challenges

1. Lack of shared vision and roadmap
2. Lack of IT governance
3. Lack of stakeholder buy-in
4. Premature software acquisition
5. Disconnect between IT and rest of org
6. Underpowered change management
7. No supporting strategy or prioritization
8. Migration of faulty processes to new tools

Our Toolbox

Human-Centered Design
Listening, empathizing, and co-designing

Knowledge Management
Enabling knowledge exchange & discovery

Change Management
Supporting a pleasant journey from A to B

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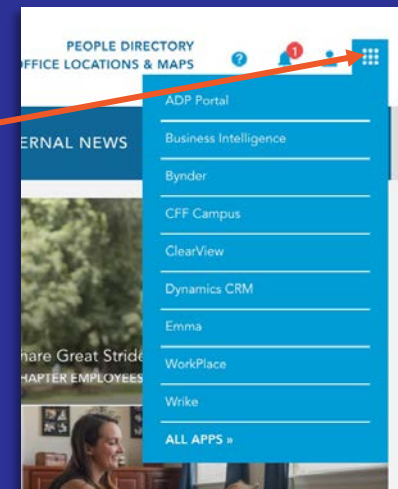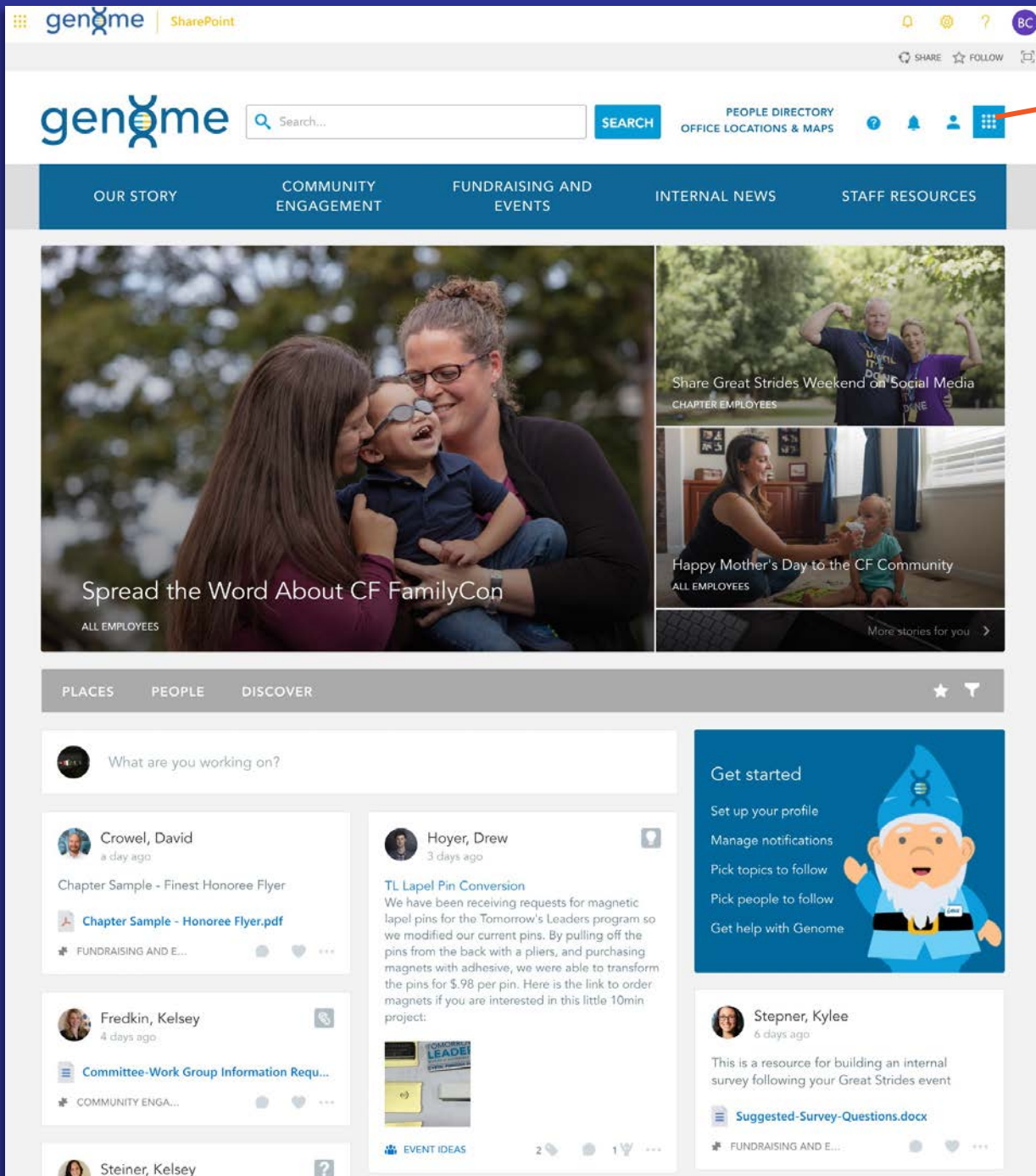
Intranet Project Examples

Intranet Platform Experience

We have led the design and implementation of intranets for many large, complex organizations on a variety of platforms.
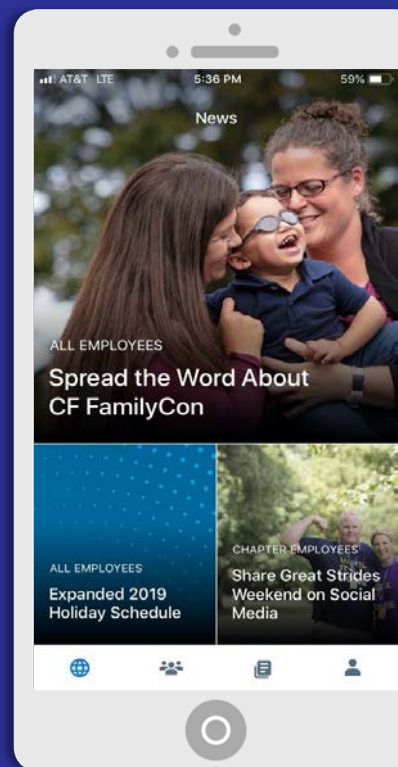
"Genome" Intranet for Cystic Fibrosis Foundation

Built on customized Beezy platform + SharePoint

"Homeroom" Intranet for Start Early

Built on customized Unily platform + SharePoint
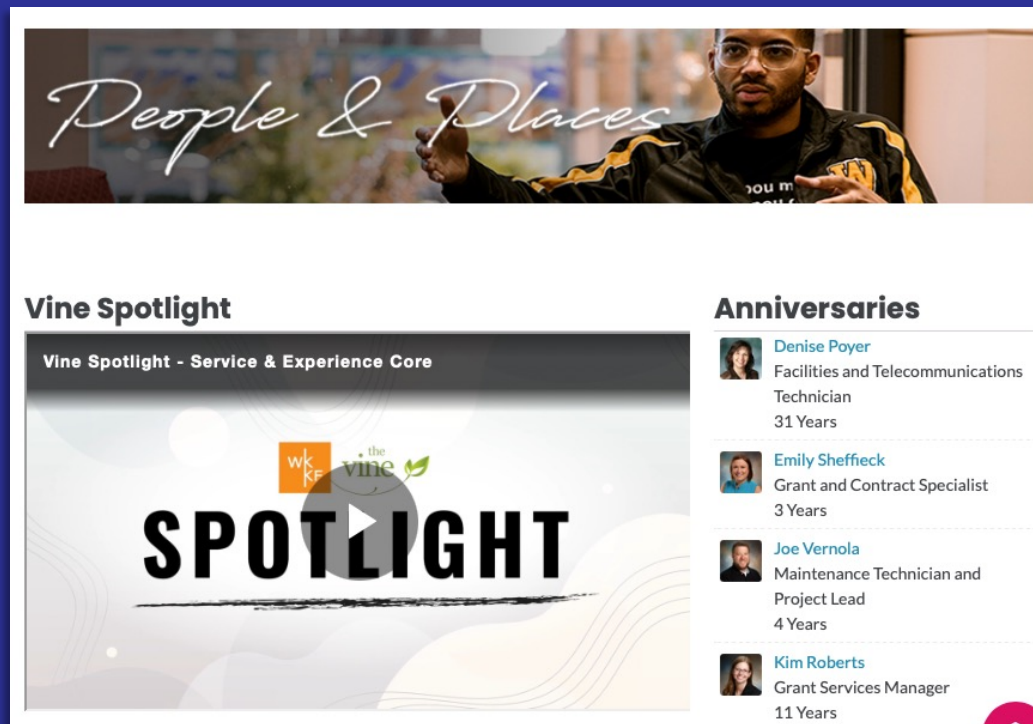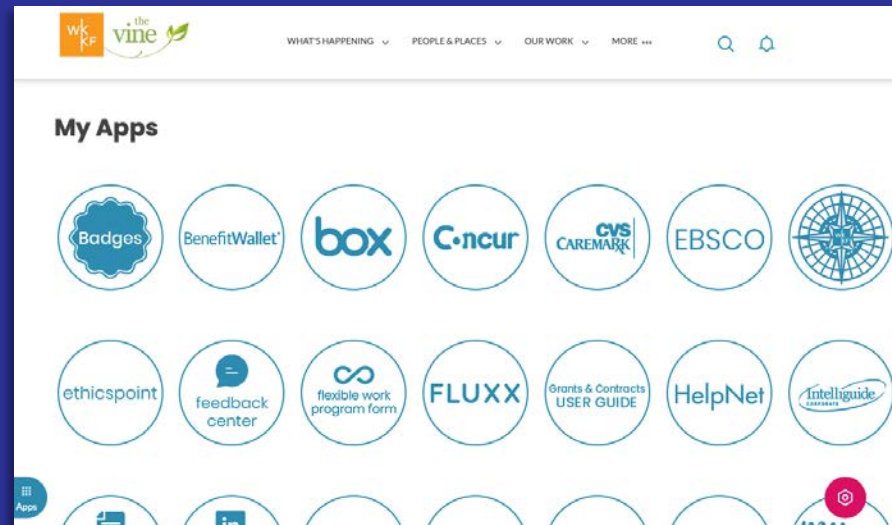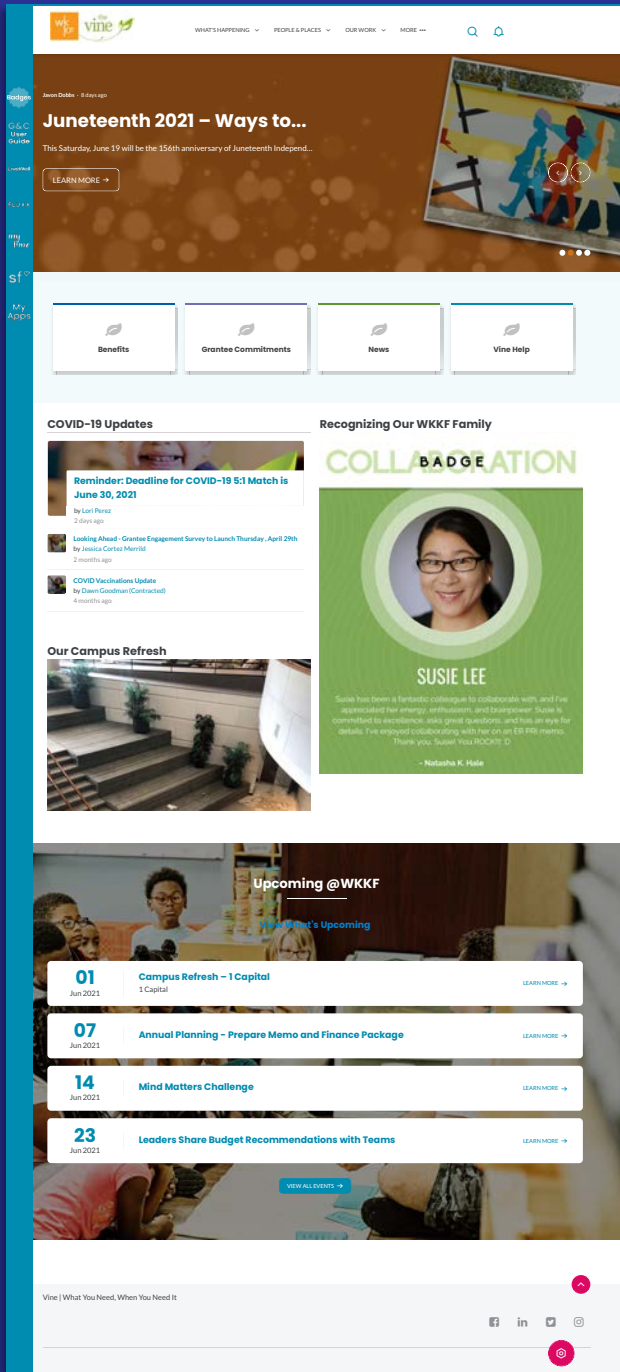
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"The Vine" Intranet for W.K. Kellogg Foundation

Built on customized Interact platform + SharePoint

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"Studio 7" Intranet for Alvin Ailey Dance Foundation

Built using Modern SharePoint Online Sites, no customization

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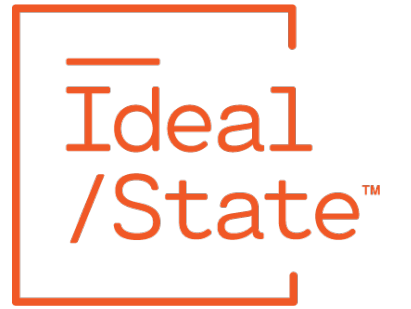
Project Approach

Phase 1: Strategy & Tech Selection (3-4 months)

Discovery

- Lead future-state vision workshop
- Conduct 1:1 interviews and focus groups
- Review existing materials
- Synthesize findings & finalize use cases
- **Deliverable: Findings & Recommendations Report**

Tech Selection

- Landscape analysis of best-in-class platforms
- Evaluate top 3-4 platforms that align with requirements
- Facilitate platform demos
- **Deliverable: Final tech selection**

UX & Design Exploration

- Develop and lead UX research studies (card sort, tree test, etc.) to define and validate site architecture with users
- **Deliverable: Information architecture and site map**
- **Deliverable: Mood boards to define design approach**

Strategic Plan

- Finalize IA
- Define change mgmt. to support user adoption and rollout
- Define success metrics
- Define intranet management and governance model
- **Deliverable: Intranet build and launch plan, including Phase 2 timeline and budget**
- **Deliverable: Intranet management and governance plan**

Tech Selection

Includes detailed evaluation of platforms against org-specific and general intranet requirements

Administration — Count 6

#						
1	Admin console	Must Have	Not Supported	Supported	Supported	Supported
2	Distribute content management by page/section	Must Have	Not Supported	Supported	Supported	Supported
3	Manage permissions using Google User Profiles a...	Must Have	Supported	Supported	Supported	Supported
4	Manage permissions/visibility at page level	Must Have	Not Supported	Supported	Supported	Supported
5	SSO authentication	Must Have	Supported	Supported	Supported	Supported
6	Native analytics dashboard	Nice to Have	Not Supported	Supported	Supported	Supported

Collaboration & Communication — Count 9

#						
7	Collaborative workspaces (groups, etc)	Nice to Have	Not Supported	Supported	Supported	Supported
8	Direct meet or message colleagues	Nice to Have	Supported	Supported	Supported	Supported
9	Enterprise social channels	Nice to Have	Requires Integration	Supported	Supported	Supported
10	Google file collaboration	Nice to Have	Supported	Supported	Not Supported	Not Supported
11	Homepage announcements	Nice to Have	Supported	Supported	Supported	Not Supported
12	In-app notifications	Nice to Have	Not Supported	Supported	Supported	Supported
13	Mandatory read content	Nice to Have	Not Supported	Supported	Supported	Not Supported
14	Push notifications on mobile	Nice to Have	Not Supported	Supported	Supported	Supported
15	Shared team calendar	Nice to Have	Supported	Supported	Supported	Supported

Content Management — Count 5

	Drag and drop page editor	Must Have	Supported	Supported	Not Supported	Supported

Phase 2: Build & Launch (4-6 months)

Build

- Identify technical partner based on platform selected
- Define internal staffing and support roles
- Provide strategic oversight and quality assurance support
- Provide project management support using agile methodology
- **Deliverable: Intranet built in accordance with strategy**

Test

- Conduct QA and user acceptance testing with staff representing different personas
- Manage issue resolution
- **Deliverable: Launch-Ready Intranet**

Launch

- Support end-user adoption through change communication, intranet team training/support
- Develop end-user/manager documentation and provide knowledge transfer to key staff
- **Deliverable: Successful intranet launch**

Continuously Improve

- Implement monitoring and measurement approach
- Define and implement continuous improvement plan
- **Deliverable: KPI dashboard and related processes**
- **Deliverable: Continuous improvement plan**

Intranet Use Cases

Key Features Of A Modern Intranet

Communication & Collaboration

- Company news & announcements
- Searchable staff directory & profiles
- All-staff discussions and groups
- Calendars
- Staff recognition

Modern Work

- Enterprise search
- Mobile app
- Single Sign-On (SSO)
- Apps directory
- Integrations with key systems (HRIS)
- Self-service support pages
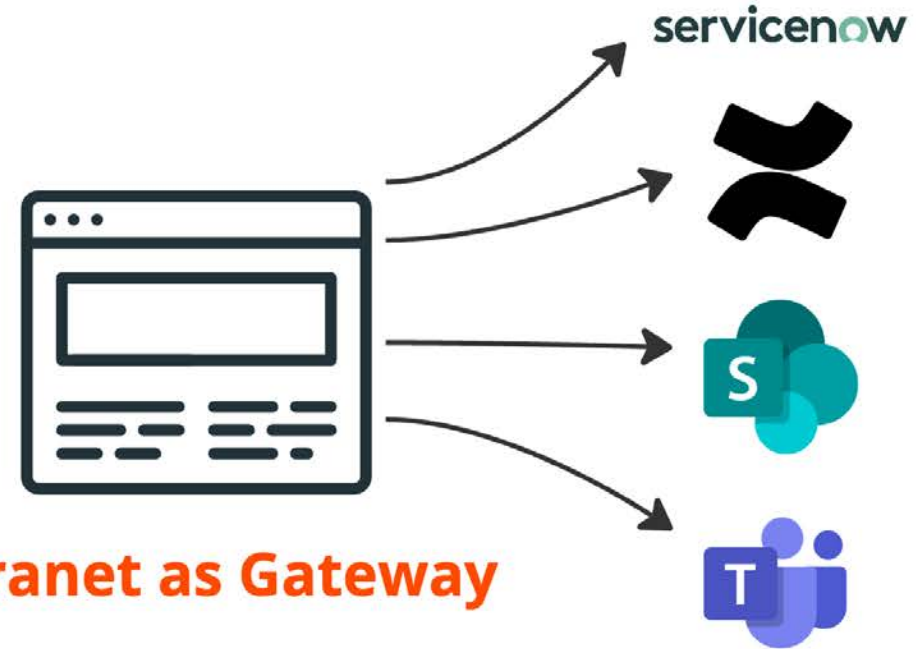- Personalized alerts and notifications

Content

- Video
- Commenting and liking
- Usage and viewer analytics
- Social media feeds
- Visible content owners
- Templates

The Evolution Of The Intranet

Intranet as Respository Vs. Intranet as Gateway
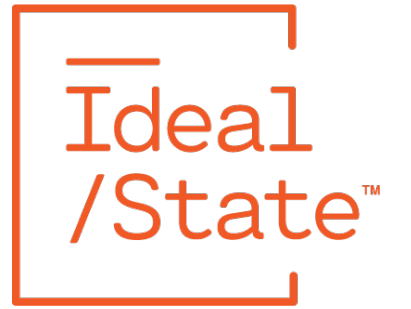
Modern Intranet Tour

Connection

Encourage meaningful connections by enabling employees to easily discover relevant experiences, communications, and communities

Surface a gateway to discover & access data from other systems

Target the right news to the right employees at the right time, right where they work.

Provide employees with a dashboard of their critical apps and resources.

Host company-wide events to spark awareness and engagement.
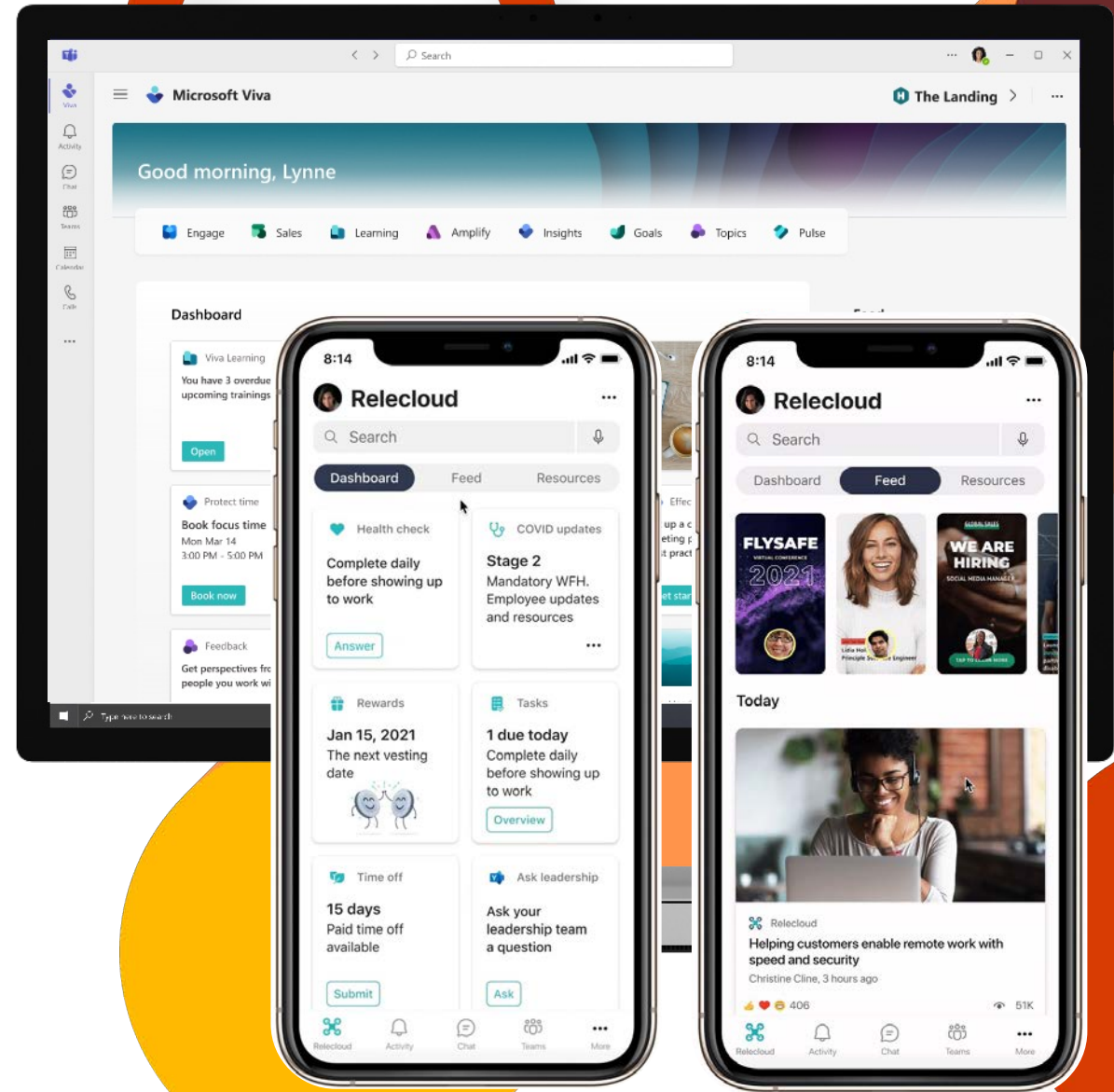
Deliver your entire intranet experience right within the Teams application

Join the discussion

Share and connect with coworkers

Weigh in on important news and events happening at work

Stay on top of conversations from your communities

Ideation

Enable a culture of innovation

Enable employees to ideate and collaborate with peers to innovate.

Gamify employee engagement and encouragement with upvotes.

Ensure proper governance and reviews of ideas by a team of curators to ensure they are appropriately clubbed under categories relevant to the organization.
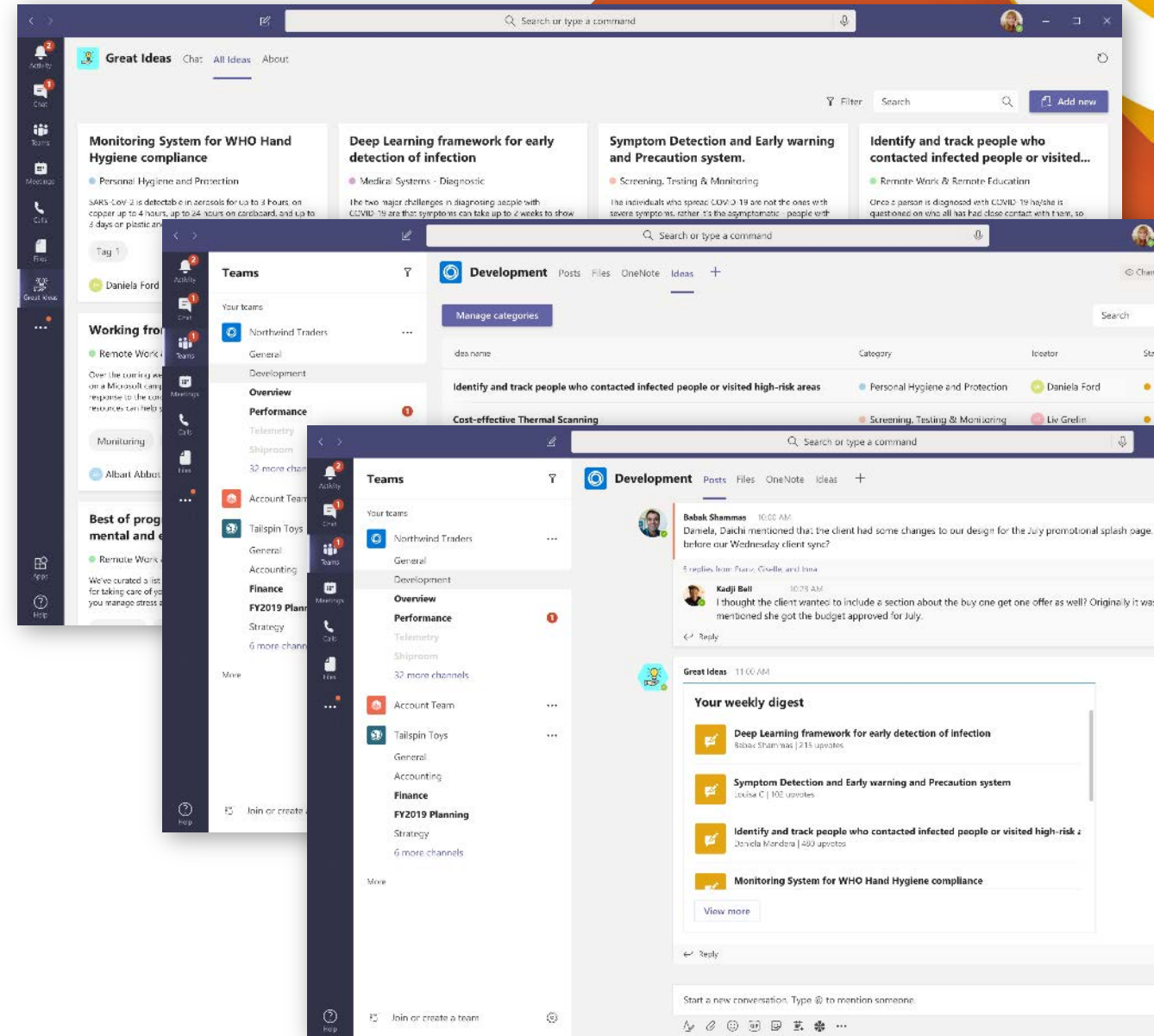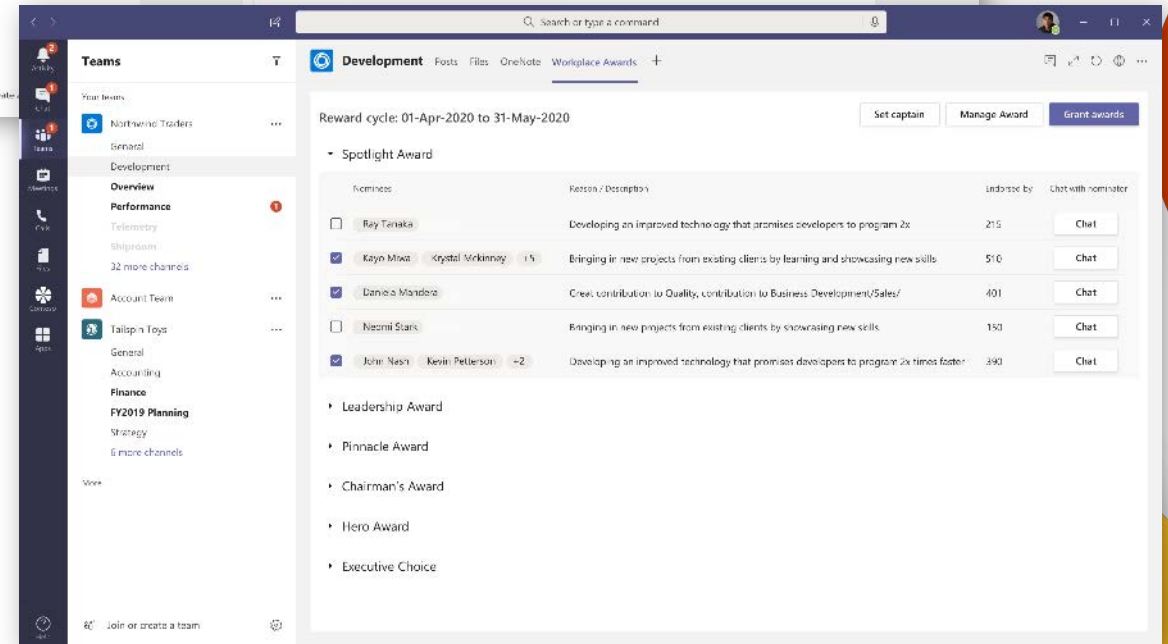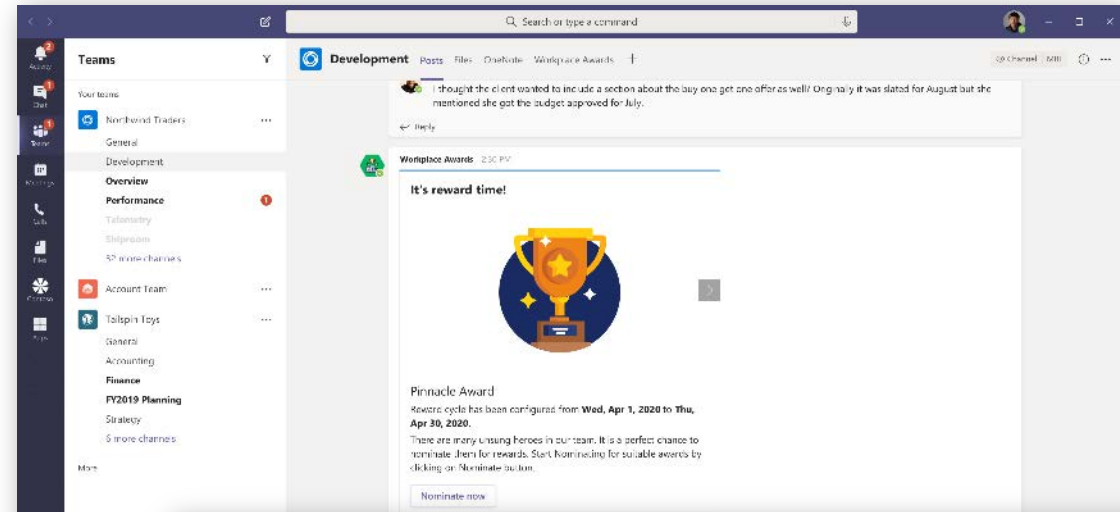
Rewards and recognition

Foster recognition and encourage culture of employee appreciation

Raise employee morale by providing a rewards and recognition program.

Allow employees to nominate colleagues easily for awards and to endorse nominations.

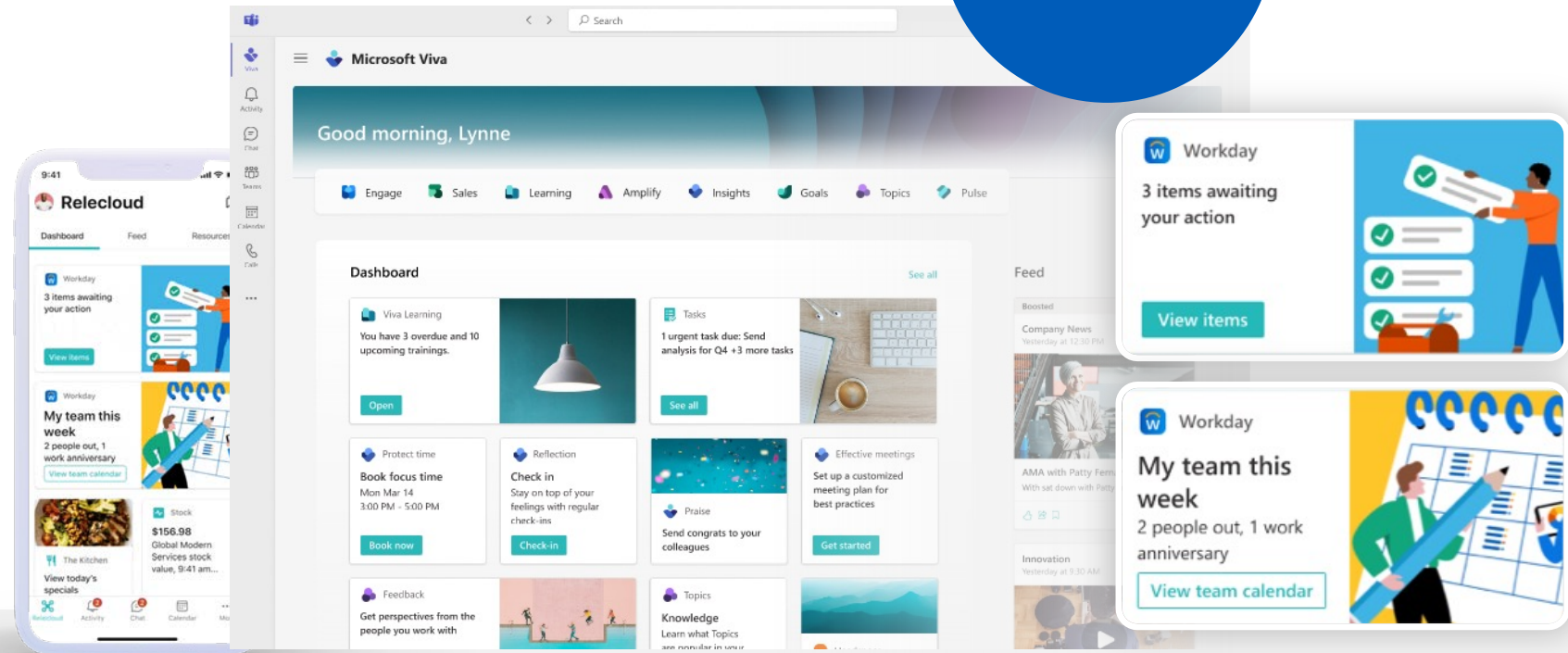Manage the award nomination and granting process.

Realize employee potential and drive productivity with Workday

Deliver personalized recommendations, tasks and actions to people when they need them

Empower leaders with insights that allow them to better understand their people

Enable seamless access to Workday content and actions from a single workspace

Thank you!

For more info, visit www.idealstate.co