

## Introduction

Intranets are web spaces that are used on a daily basis by many different people at the same time. Constantly. They can contain tens or hundreds of thousands of content items. Publishing intranets and maintaining them over time, and making them meaningful for the right people at the right time, is a considerable challenge that lies entirely (or almost entirely) in establishing the best possible organisational structure. Only in this way can we ensure that intranet designs are effective, sustainable, and able to grow organically over time. And only in this way can we ensure that our colleagues are satisfied with them.

Information architecture (which in some cases I'll abbreviate as IA) is the discipline that deals specifically with how information and content are organised. It consists of many elements that need to work together in a coordinated manner. Designing an IA doesn't just mean thinking about menus and labels: it also includes organising pathways, aggregations, filter systems, metadata, profiling models, customisation methods, and shortcuts.

In the world of intranets changes always arrive with a time lag with respect to the external web, but they can have a bigger impact on the organisation as their design, and intranet sites themselves, are “denser” than external ones.

If we also look at research in the field and at the latest publications,<sup>2</sup> we see that many things are moving at the same time, and not just in navigation menus: the technology is evolving, applications are changing and standards are becoming established. E-commerce has led us to appreciate the many virtues of filters and facets, *social* applications have given us a tangible experience of “profiled content”, wherever we look

we find big sites with mega menus, rich *footers* and ways of customising the experience, social filters, mobile navigation, automatic aggregations and personal menus.

All of this is information architecture: a much richer and more powerful toolbox than we had in the past, and which requires new skills if it's to be used to best effect. At all times, we need to keep the following three principles in mind:

1. **always respect employees' mental map**, tasks and expectations with respect to the information and the actions they need to perform
2. **also respect the nature of the content**, whether it takes the form of pages, FAQs, documents, PowerPoint presentations or Excel spreadsheets
3. **adopt a medium-long term view** that can adapt to the many changes and additions that will occur over time.

This discipline has always existed in a paradoxical state. On the one hand we have a sector that is constantly evolving, with interesting national and international events in which we examine and take the pulse of the situation.<sup>3</sup> On the other hand, it is always difficult to bring the subject of IA into clear focus, in view of its very pervasiveness. It is often confused with closely related or even totally separate topics. We find it easy to talk about design, page templates, *layout*, *user experience* or *content management*. But we struggle to focus on navigation, labels, filters, categories or metadata. Like distracted listeners at a jazz concert, we find it easy to discern the blare of a trumpet solo, but harder to follow the line of the double bass. We're fascinated by the melody of the design

<sup>2</sup> We're referring here to research conducted by the Nielsen Norman Group on “Intranet Information Architecture. Design Methods and Case Studies”, 2014, see <https://www.nngroup.com/reports/intranet-information-architecture-design-methods> and by Prescient Digital, on “Intranet information architectures”, 2012, <http://www.prescientdigital.com/articles/intranet-articles/intranet-information-architectures/>.

<sup>3</sup> We'll mention just one of the many introductory sources, one of the shortest: “Complete Beginner's Guide to Information Architecture”, 2015, <http://www.uxbooth.com/articles/complete-beginners-guide-to-information-architecture/>. In Italy, the discipline is being taken forward by an active community that revolves around Architecta <http://www.architector.it/>. The most important IA event in Italy is the IA Summit: <http://iasummit.it/>.

but slow to perceive the complex harmony of content organisation. At company level, there are a number of reasons for this lack of attention. I'll try to list them, half-jokingly but wholly in earnest:

- haste to complete the project (*let's get online, we can change things as we go along*)
- organisational presumption (*I know the company, the content needs to be organised around marketing processes*)
- habit (*but we usually organise things by registration code*)
- strategic underestimation (*never mind the IA, have they sent you the draft layout?*)
- methodological approximation (*I had a chat with the manager in the coffee shop and she liked my idea*)
- low consideration of users (*they can't find it? But it's right there in the "Operational Functions" sub-section!*)
- megalomania (*anyway, the corporate mission needs to be the first thing people see*).

Sometimes specialists in the subject also want to have their say and that complicates the situation even more. They have an exaggerated idea of their role and they imply, with false reticence, that IA is not, in the best of cases, an intelligent service tool but an esoteric, almost *new age*, practice. Sadly for us, we don't live in a commune and we battle each day not with the phases of the moon but with the very earthly problem of simplifying work for ourselves and for our colleagues. And the best way to do that is to work on the IA. Hands-on, intelligently, and solving one problem at a time.

As consultants, we're often asked to help companies with intranets they feel are unsatisfactory or even a failure. But we gradually realise that the main problem is one of content, which over time has become impossible

to find, badly organised, poorly coordinated and out of date. Clients tell us about the need for an update, the fact that the intranet needs to be modernised and the design brought into line with the new standards. At the same time, employees tell us a simpler and more down-to-earth story. They tell us how hard it is to access a system where "you can't find anything" – and that they often simply give up. Behind legitimate and revealing statements like "the site needs an engine that works" lies an unsatisfactory content organisation structure. They tell the story of a great "home" that over time has become unwelcoming, with rooms that are cold and hard to reach; big, empty drawing rooms with no purpose; little box rooms stuffed with junk; tables heaped with tools and gadgets; and, all over the house, piles of rubbish and clutter that simply needs to be thrown away.

And we're certainly not the only ones to experience this. Many observers have tried to list the most common problems affecting information architecture. The Nielsen study mentioned earlier (see footnote 2), conducted on more than 70 intranets around the world, found *the top five* problems to be:

1. confusion between categories
2. unclear terminology
3. lack of consistency
4. department-based vision
5. "findability" of policies.

These are followed by terms like "lack of structure", "too much information", "no profiles", or "low-quality content".

But the problems spotlighted by Nielsen certainly aren't the only ones. We could add, for example, in no particular order:

- **folders to store documents**
- **too many top-level items**
- **“political” use of top-level items**
- **too many layers**
- **inconsistency between page titles and menus**
- **content not updated**
- **poor tagging and metadata**
- **duplication of information.**

We could go on.

This book expands on a specific section of my previous book on intranets.<sup>4</sup> It doesn't enter into the merits of internet design *tout court* (for which please refer to other reference texts, some of them truly excellent).<sup>5</sup> Instead, it focuses on just one, crucial aspect: providing practical tools and a fairly wide overview of IA to understand how to adopt *patterns* in an intelligent and thoughtful manner. Each chapter, and each section, has been conceived to be used on a stand-alone basis, so that readers can dip in and apply them when necessary. I believe all of this is defined, in current use, as the *state of the art*.

In **Chapter 1** we define the general rules that must be observed, regardless of the type of decisions to be made in each individual case. They are like the articles of the Constitution, so none of the specific applications set up in a given IA should infringe them. Although these

---

<sup>4</sup> G. Mason, **Intranet 2.0**, Tecniche Nuove, 2010.

<sup>5</sup> For example J. Robertson, **Essential intranets**, Step Two designs, 2013 or M. White, **The intranet management handbook**, Facet publishing, 2011.

principles are based on abstract concepts, they have applications and consequences, as I hope to show, that are concrete and discernible.

In **Chapter 2**, we address the subject of navigations (note the plural), i.e. the classic navigation menus. But we'll be addressing other things too. We will see that there are some fairly strict rules to observe regarding the primary navigation and we will also see that, over time, other important navigations have taken their place alongside the main navigation system. First and foremost, personal navigation (“*My page*”) which, after many years of conceptual gestation, is beginning to see the light in intranet projects (and none too soon!).

In **Chapter 3** we discuss labels and the sections associated with them. We will see that while each organisation is different, there are some recurring elements (for example “Human Resources”) and will examine how these cases are usually handled.

**Chapter 4** reviews different ways of moving around the IA, or of displaying its structure alongside the navigations. We will review objects such as faceted filters, mega menus, customisation and so on.

In **Chapter 5** we examine the process of building an IA, starting by working alongside and along with employees. We will see how individuals are involved and how the main project output should be produced.

My previous book on intranets came out in 2010, and since then many works on knowledge management in companies have been published. It seems that Italy's academic and consultancy communities have realised that this subject has dignity in its own right and merits deeper investigation. It is a great pity that this investigation sometimes (but not always) lacks “nutritional” value,. What's more, it is marred by flaws that are typical of much home-grown specialist literature, which often diverges widely from the practice and even more widely from the needs of the people working in the companies concerned and fighting their

battles in silence, day by day, one step at a time. The more I delved into these “contributions”, the more aware I became of their complacent abstraction and the more I felt the need to talk about things that can be seen, touched, applied and measured. Readers will assess for themselves whether or not I have succeeded in this. In any case, this has always been the only way I know of to strive to be honest.

I would like to thank everyone who has helped improve this book, in some cases substantially, through their reading, advice, criticism and suggestions. They include: Elisabetta Armentano, Beatrice Monacelli, Michele Melis, Giuliana Mason, Marco Re, Manuela Bussaglia, Susanna Tosti and Maurizio Boscarol. Thanks also to Stefania Genova, Coop Alleanza 3.0, Luciana de Laurentiis, Sara Bruno and all the team at Fastweb, Enrico Soprani di Marazzi, and Teresa Dallera and Bruno Farina of Ariadne Digital, all people with whom I have had the pleasure to work and who gave me permission to publish some of the screenshots you will find in the book.

When you’re writing about intranets you often run the risk of running up a large number of debts of gratitude (which is not in itself necessarily unpleasing), especially for collecting meaningful examples from corporate intranets. So my heartfelt thanks go first and foremost to James Robertson, who, along with the team at Step Two, has been working for years (as, I would hazard to say, a global pioneer) to advance the subject of intranets. Step Two allowed me to publish many of the examples you will find in these pages. For these (and for everything else) I would like to offer him my huge and heartfelt thanks, on behalf also of my readers.

My thanks also to the other companies and organisations from around the world who allowed me to publish their examples: the Canadian teams at Thoughtfarmer and Habanero Consulting, the people from the Digital Workplace group, Toby Ward and Prescient Digital, Milco Forni from Regione Emilia Romagna, and Susanna Orlando from Unicoop Tirreno.

My special thanks go to my friend Luisa Carrada, who gave me on-point and valuable suggestions on style, and to Cristiano Siri, a close friend and sharp observer who helped me improve the content and in some cases compelled me to set out my thoughts more clearly. Thanks also to Stefano Dominici and Maria Cristina Lavazza, of the UXUniversity, for the road we’ve travelled together, and to Maria Bertolini for her support on the design and layout. Lastly, a special thanks to Leuca Alison, my partner in life, for her gaze, her patience and her support.

All that’s left for me to say is “enjoy the read, and best wishes for your intranet’s information architecture”.