

Post Interview Notes/Summary

1. Simon's Role & Responsibilities

Simon works on SharePoint administration across the organization's intranet. His role includes:

- Building and supporting collaboration sites (departmental + project sites).
- Supporting communication sites, including TRS Home and departmental homepages.
- Handling tickets to update or modify communication site content.
- Providing training to the few contributors who are now allowed to edit communication sites.

He notes that SharePoint = the entire intranet, spanning both collaboration and communication sites.

2. Ownership & Governance

Communication Sites

- Owned by the business units.
- Content updates require the business to submit tickets to IT.
- A named point of contact usually appears on the site footer.
- Few contributors are allowed to make changes directly.

Collaboration Sites

- Owned by the business or project team.
- IT creates sites using templates and coordinates with Records Management.
- Permissions are assigned by the business and managed through tickets or GroupID.

Overall Ownership

- IT owns the overarching intranet, especially collaboration components.
- Communication site content is jointly managed: IT for structure, business for content.

3. Design Standards & Guidelines

Collaboration Sites

- A default template is provided by SharePoint.
- After creation, businesses are free to configure as they need.
- No strict design governance.

Communication Sites

- Initially, IT set up consistent layouts for:
 - Tier 1 landing pages (directors, org charts, key content)
 - Tier 2 pages
- Now shifting toward more business-driven page building as certain groups (e.g., IT technical communicators) receive training.
- Aim: maintain consistency, but exceptions are made for special needs (e.g., newsletters).

Design Constraints

- SharePoint has limited design flexibility.
- IT focuses on:
 - Good white space
 - Responsive design
 - Content-focused layouts (not marketing-style designs)

4. Content Management Processes

Communication Sites

- No formal workflow like draft → publish.
- Users typically send mockups (PPTs) to IT for new/updated pages.
- Most changes come through ticketing.

Collaboration Sites

- Content is updated by team members directly.
- Permissions changes are tracked due to compliance requirements.

Frequency of Updates

- Varies widely by department.
- Some pages (e.g., policies & procedures) are updated frequently due to structured review cycles.
- Many small updates may lag because people are busy.

5. Information Architecture & Navigation

- The mega menu (main navigation) is mostly static.
- Built collaboratively with OCM, and difficult to change due to limited space.
- Navigation updates occur via tickets, but rarely.
- On-page links (“quick links”) handle most sub-navigation.

6. Last Intranet Redesign

- Migration from on-prem to SharePoint Online was approx. 4 years ago (Unsure of exact date).

7. Governance Documentation & Access

- Internal governance documentation lives in Confluence.
- Highly restricted; not available outside IT.
- No public PDF or external document exists for intranet governance.

8. Training & Onboarding

- Historically, contributors to communication sites were almost exclusively IT.
- Only recently have business users begun to receive training.
- Fewer than 10 people currently contribute directly.
- Collaboration-site training isn’t formalized — similar to learning standard Microsoft tools.

9. Major Challenges

Top challenge: Understanding SharePoint terminology

People struggle with concepts like:

- Site vs library
- Collaboration vs communication site

- Permissions and inheritance

This makes it hard for users to articulate needs.

Other challenges

- Permissions are complex and hard to explain.
- Limited time for business owners to maintain content.
- No automated triggers for small updates → things get outdated.

10. Opportunities & Improvements

Suggestions:

- Better time allocation for departments to maintain content.
- Possibly clearer governance triggers for content refresh cycles.
- Clarifying SharePoint terminology so business users can communicate needs better.

He does *not* see major governance issues with collaboration sites; most challenges relate to communication sites.

11. Additional Stakeholders

Simon recommends speaking with:

- OCM (Organizational Change Management) — major influence on navigation, homepage, events calendar, etc.
- Specifically Rachel Currier, who took over governance influence after Mark Mendel left.

Interview Questions

“Thanks again for taking the time, Simon. As I mentioned briefly, I am speaking with key stakeholders like yourself to understand how the intranet is governed—things like who owns what, how content gets updated, and what are the branding guidelines, etc.

I am just looking to learn about the governance mode and understand it better from your perspective.”

There are about 20 questions - so I will get started right away.

- To begin with, can you briefly describe your role and how you interact with the intranet?

“Great, thanks for that overview. Now I’d love to shift gears and talk a bit about who owns the intranet and how decisions are made around it.”

- Who owns the overall website experience?
- Who is responsible for creating and maintaining content across different sections?
- Who decides on user experience and design standards?

“That’s helpful context. Let’s move into how content is managed

- How often is content reviewed or updated?
- Is content managed centrally or by distributed teams?
- Are there any content lifecycle rules or auto-expiry processes?

“Thanks! Now thinking about how access is handled—who can make edits, who publishes, that sort of thing...”

- Who can edit or publish content?
- What’s the typical publishing workflow from draft to live?
- How do we handle changes to navigation or information architecture?
- Who signs off on UX changes or site redesigns?
- Just out of curiosity, do you happen to know when was the intranet last redesigned?
- Who is responsible for reviewing sensitive content (e.g., legal, HR)?
- Do we conduct any user testing or accessibility audits periodically?

Now I want to ask a few questions about styling and brand guidelines.

- Do you follow any documented style, tone, or branding guidelines?
- Is there a design system in place? Who owns or updates it?
- Are there rules for labeling, categorizing, or tagging content?

- How do we ensure design and content consistency across departments?

“Got it. And are there any formal policies or documentation that guide how the intranet is used or updated?”

- Are there documented governance policies (e.g., content lifecycle, roles/responsibilities)?
- Is there training or onboarding for new intranet contributors?

“Let’s wrap up with a few questions about challenges and opportunities—what’s working well, and what you think could be better.”

- What are the biggest challenges you face in managing or governing the intranet?
- What changes would help improve intranet governance?
- Are there any other stakeholders you think I should speak with to gather additional information about the governance model?

“That’s all the questions I had for now. But if you think of anything else after this, feel free to reach out. Thanks again for sharing your time and insights—this will really help out with the research and I would be happy to share a summary of findings.”