

How to Launch Your Intranet

Getting started and implementation checklist.

A large, abstract graphic on the right side of the page. It consists of several overlapping, curved, translucent shapes in shades of purple, blue, and yellow, creating a sense of motion and depth against the dark blue background.

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Implementing new intranet software might at first seem overwhelming. But it doesn't have to be that way. Learning how to launch your intranet for your organization is easier than ever. With a little bit of planning and forward thinking, you can be up and running in a few weeks or less.

We've worked with hundreds of customers to launch Axero in organizations of all sizes. Each launch varies, but there are some common threads. We put together this list of best practices to help you with a smooth implementation.

For the best results, we recommend having a project team. Focus on each step together. Because making it a collaborative effort will only benefit you in the long run.

However, if you're a smaller company and don't have a team of people, you can be confident following these steps. They work. And when you're finished, you'll have a functional intranet.

While reading through these tasks, if you find you already have one ironed out, then skip to the next.

Task 1:
Identify your purpose, your "why."



Task 1: Identify your purpose, your “why.”

Since you’re reading this guide, you probably have some idea of the challenges you want to solve with an intranet. That’s great. You’re already ahead of the game. If you don’t know your *why*, then keep reading. Either way, this step is worth your time.

Most organizations can put their “why” into these categories. I’ll list them out below, followed by some of the most common goals.

- **To improve internal communication** – Your goal is to communicate information, like news, announcements, and project updates, to the people inside your organization. You want to make sure everyone knows what’s going on. Do you want to open the dialog and let your people comment on the news and share their ideas? Do you want to allow people to break free from email and communicate in real-time with other people in your organization?
- **To manage organizational knowledge / content** – You want to manage the creation, distribution, and use of organizational knowledge. Your goal is to capture and then make the knowledge and information in your organization easy to find and use. This could be internal (for your employees) and/or external (for your customers or partners).
- **To engage people in an online community** – You want to connect and engage the people inside (employees) or outside (customers, partners) your organization. Your goal is to connect people, let them communicate, and share information.

If you were nodding your head in agreement to the first three categories, this is where we start combining them.

- **To improve productivity & collaboration** – You want a place where your people can work together, share files and documents, communicate, and get stuff done. You want a place where teams of people can work together on projects.
- **Intranet (to do all or some of the above)** – This is where we bring everything together inside one unified platform. With an intranet, the key word here is internal. Intranets are used by the people inside your organization. An intranet

is a place where employees create content, communicate, collaborate, get stuff done, and build the company culture.

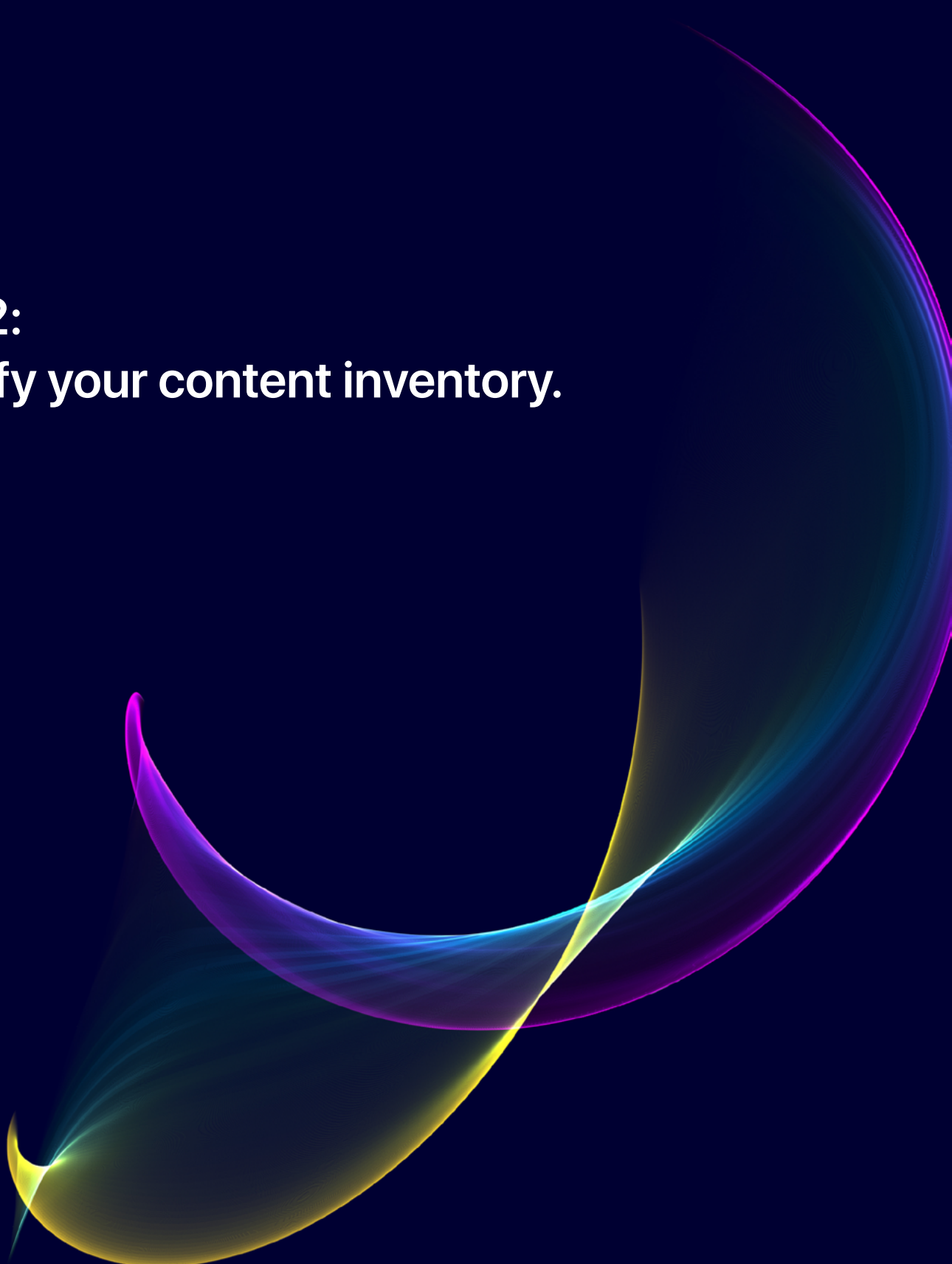
Keep in mind that these categories are not the only use cases of Axero. They are the most typical.

Most of our customers combine these categories and call them different names. Some include: Enterprise Social Network, Social Intranet, Customer Support Community, Collaboration Hub, Online Workspaces, etc. Some customers use Axero internally (as their company intranet).

Some use it externally (to provide customer support). And some do both. It's all possible.

The bullet points provided above should help you get started in defining your *why*. The most valuable part of this step is to understand which categories are the most important to you.

Task 2:
Identify your content inventory.



Task 2: Identify your content inventory.

Your intranet should be the primary source for your people to access organizational information. To keep it useful, engaging, and relevant, populate it with content that people access often. Make it the go-to destination to find this information. Start with content you already have and add to it as you grow. Here's a list to get you started:

- Company policy & procedures
- Benefits materials
- Past and new news articles and announcements
- Frequently asked questions
- Photos of employee activities (volunteering, corporate hang outs, picnics, etc.)
- Promotional or training videos
- Company handbook
- Newsletters
- Upcoming events

Think about how your organization categorizes this information. In the most common scenarios, it might look like this:

- Your HR department handles company policy documents, benefits materials, and your company handbook.
- Your Communications department handles newsletters, company announcements, and updates.

I may be generalizing here, because your company may be different. You can group most content into a company department, project team, or a logical category. Knowing where this content lives in your organization will help you figure out the next step.

Task 3:
Choose your functionality.



Task 3: Choose your functionality.

The Axero intranet software includes a wide range of standard functionality out-of-the-box. You decide which features to use. Do you need every single feature turned on from the start? Maybe you do, maybe you don't.

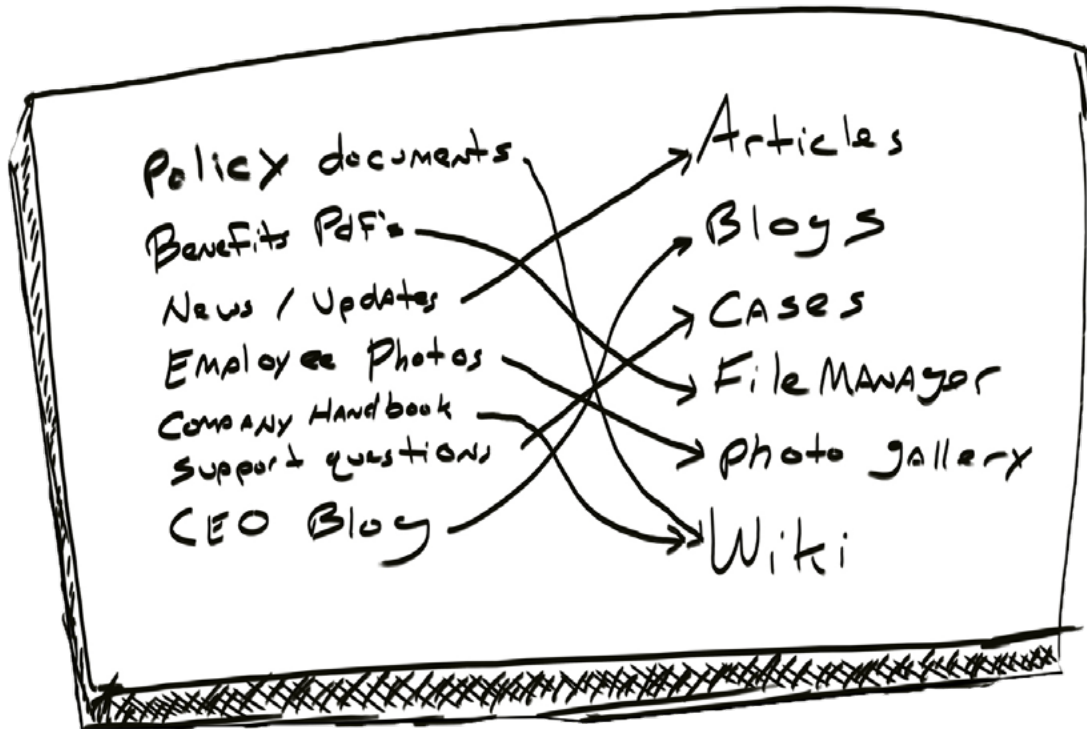
Many of our customers turn off the features they're not going to use right away. They start by mapping the features that will best organize the content they identified in Task 2. For example:

- **Company policy documents** – These are usually written in Word documents or in PDFs. You can upload them into the File Manager and let your people download them when needed. Or, better yet, you can copy-paste the content into Wiki pages. Wikis allow you to organize content and information into a hierarchy. You can read them without downloading and you can update them on the fly.
- **News & company announcements** – Since these happen more often and are ongoing, they work well in a list format. The Articles or Blogs features lend well to this type of information. They show you the latest information at the top of the list, they're easy to scan, and they show up as they happen in the activity stream.
- **Upcoming events** – Think: company meetings, project deadlines, webinars, conferences, or training days. In this case, the Events feature in Axero is a no-brainer. They allow you to see what's upcoming, collect RSVPs, and view it in a calendar format.

To get started, check out the [Axero Feature Tour](#) for an overview of all the features in the platform. Decide which of them best fit to organize or manage the content you identified in Task 2.

Axero's features are already aligned to most types of content. So this should be an easy task.

Here's an example of what this might look like. Please excuse my horrible handwriting. You don't need to get all geeky with sophisticated charting and diagramming software to do this step. A pen and paper can often work just as well.





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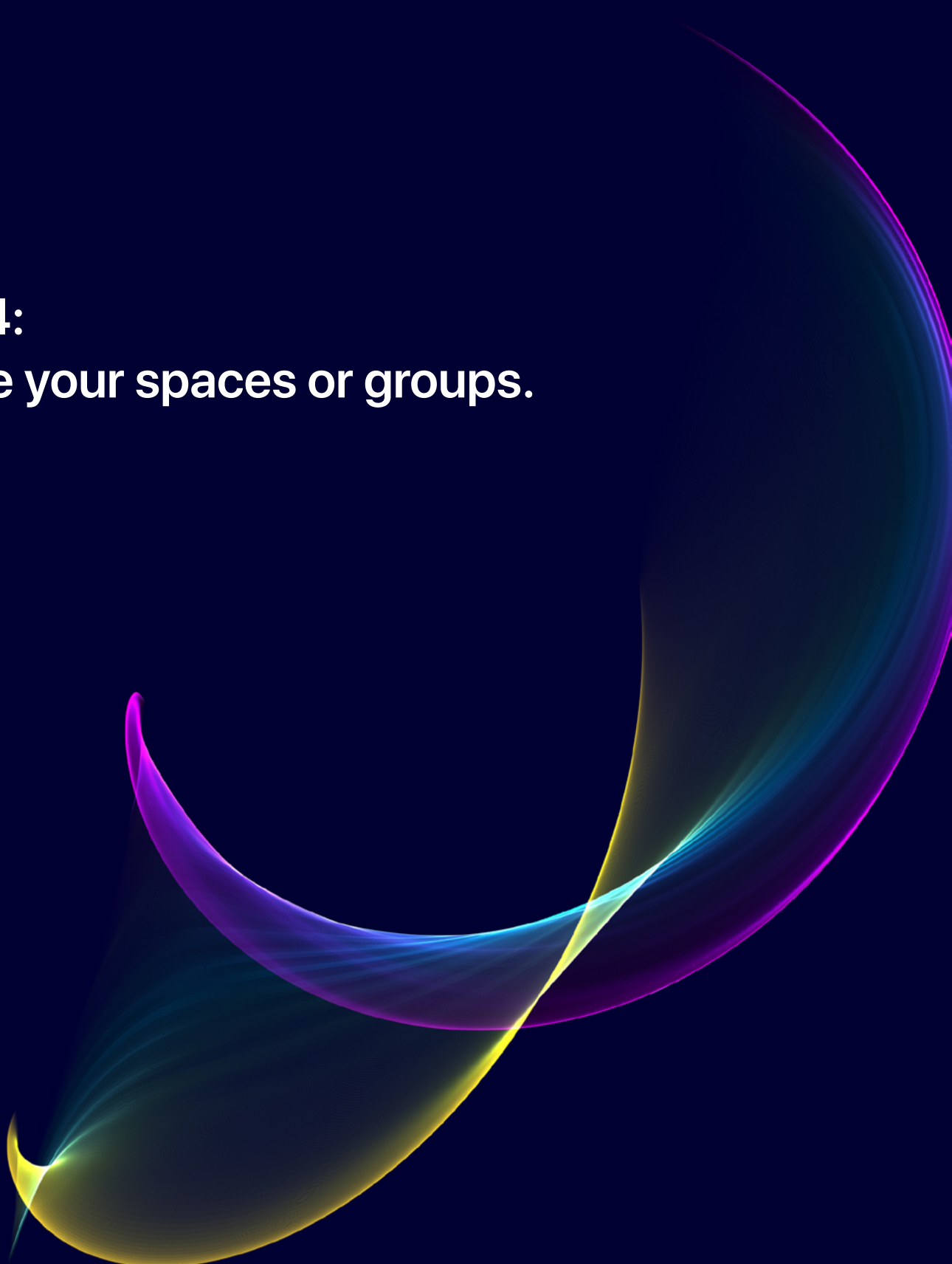
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Task 4:
Define your spaces or groups.



Task 4: Define your spaces or groups.

The goal for this task is to organize your intranet and define your Spaces and groups.

What's a Space?

A Space is a place where you group people, content, and conversations.

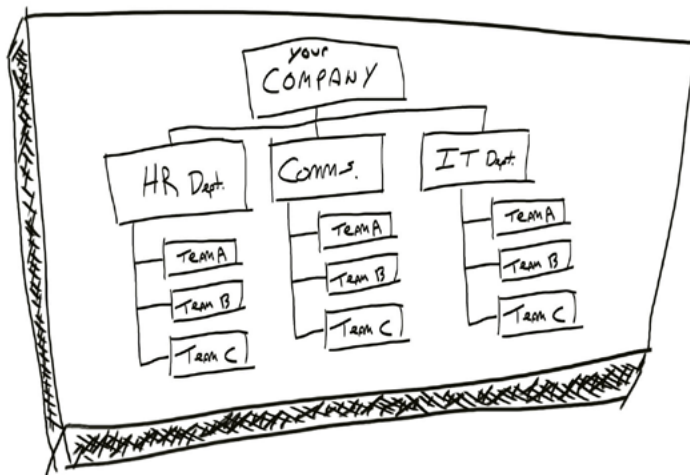
They keep everything organized in a way that is comfortable and familiar to how you already work. These sub-divided areas help make it easy and intuitive for your employees to find what they need.

We have two types of Spaces in Axero:

- **Public Spaces** - Everyone can see them, join them, and view the content inside.
- **Private Spaces** - These are hidden. Nobody will know these exist--unless you invite them.

Begin by creating a space for each of your company departments. So you might have a space for Human Resources, a space for Communications, a space for your IT department, and any others that make sense for you.

From there, you can create more spaces as you see fit. You can even create a hierarchy of spaces inside spaces. It might look something like this:



For example:

HR Department

Wiki Feature – This is where you put your company policy documents, FAQs, and company handbook.

Articles – This is where you post the latest HR news and announcements.

File Manager – Upload PDFs or documents about your benefits or health insurance plans.

Events / Calendar – This is where you'll post info for things like open enrollment deadlines, training sessions, or other HR meetings.

IT Department

Wiki Feature – This is where you put your IT or technology policy documents, how-to's, and guidelines.

Cases – You can use this as your Help Desk, where employees submit IT issues and you can track the progress on solving them.

File Manager – Upload your IT related documents ... best practices, whitepapers, or software documentation.

Events / Calendar – Keep track of meetings, scheduled network updates, and training sessions.

Communications Department

Articles – Great for publishing company wide news, announcements, updates, and press releases.

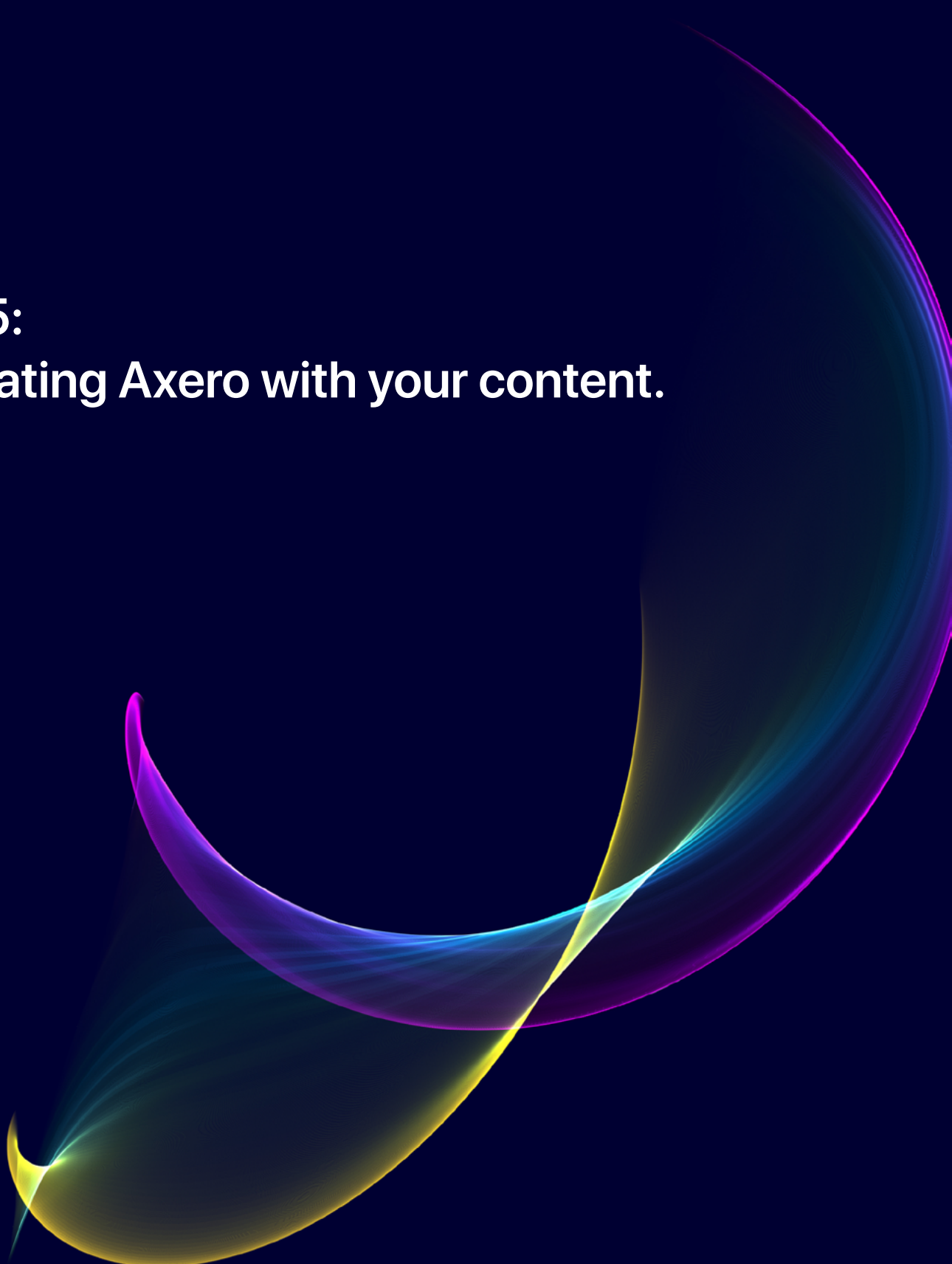
Ideas – Use this as your online suggestion box, where people can submit and surface great new ideas.

File Manager – Upload your PDFs, keep track of Word documents and make them accessible to everyone.

Blogs – Set your CEO up with a blog to share industry and company insights, ideas, and happenings.

Then, once you've defined your spaces, you'll need to decide which features to turn on or off for each space. You already mapped your content to specific features, now you can apply it to your spaces.

Task 5:
Populating Axero with your content.



Task 5: Populating Axero with your content.

Now that you created your content inventory, mapped your content to features, and decided on the spaces that you'll create (and what goes in those spaces), it's time to create them inside Axero.

Content is probably the most important step in creating your intranet. This is where you take all of your company's frequently used information and post it in your new intranet. This is also when your intranet starts to come to life.

It's ideal to have a team of people trained and organized to own their section of the intranet. HR manages their space and populates their content. Comms owns their space, and they populate it. IT, Sales and Marketing. Etc. This will help things go faster, and will give those people a sense of ownership in the process and the success of the intranet.

When people have access to the information they need to do their jobs, they are more productive and more engaged.

Check out the [Create a Space](#) document that explains step-by-step how to create spaces. And also check out [How to Add Content to Your Intranet](#).

Task 6:
**Tailor the look and feel to your brand
and your people.**



Task 6: Tailor the look and feel to your brand and your people.

Axero is flexible when it comes to changing the look and feel of your site. For beginners and non-technical people, it offers a default “template” for making basic customizations. Such as: changing the header color, adding a logo, and making minor visual adjustments.

For more advanced design, the possibilities are endless. If you have designers or developers in house, you can leverage their skills. Even beginner designers/ developers can step right into Axero to adjust navigation or change page layouts.

Goal: Create a design that is appealing and matches your corporate style. Make sure it’s not too “busy” or overwhelming to the point that it distracts the users.

More information: A great place to start is by [uploading your logo](#) and choosing your header color. Then you can also check out [How to Customize Your Intranet](#).



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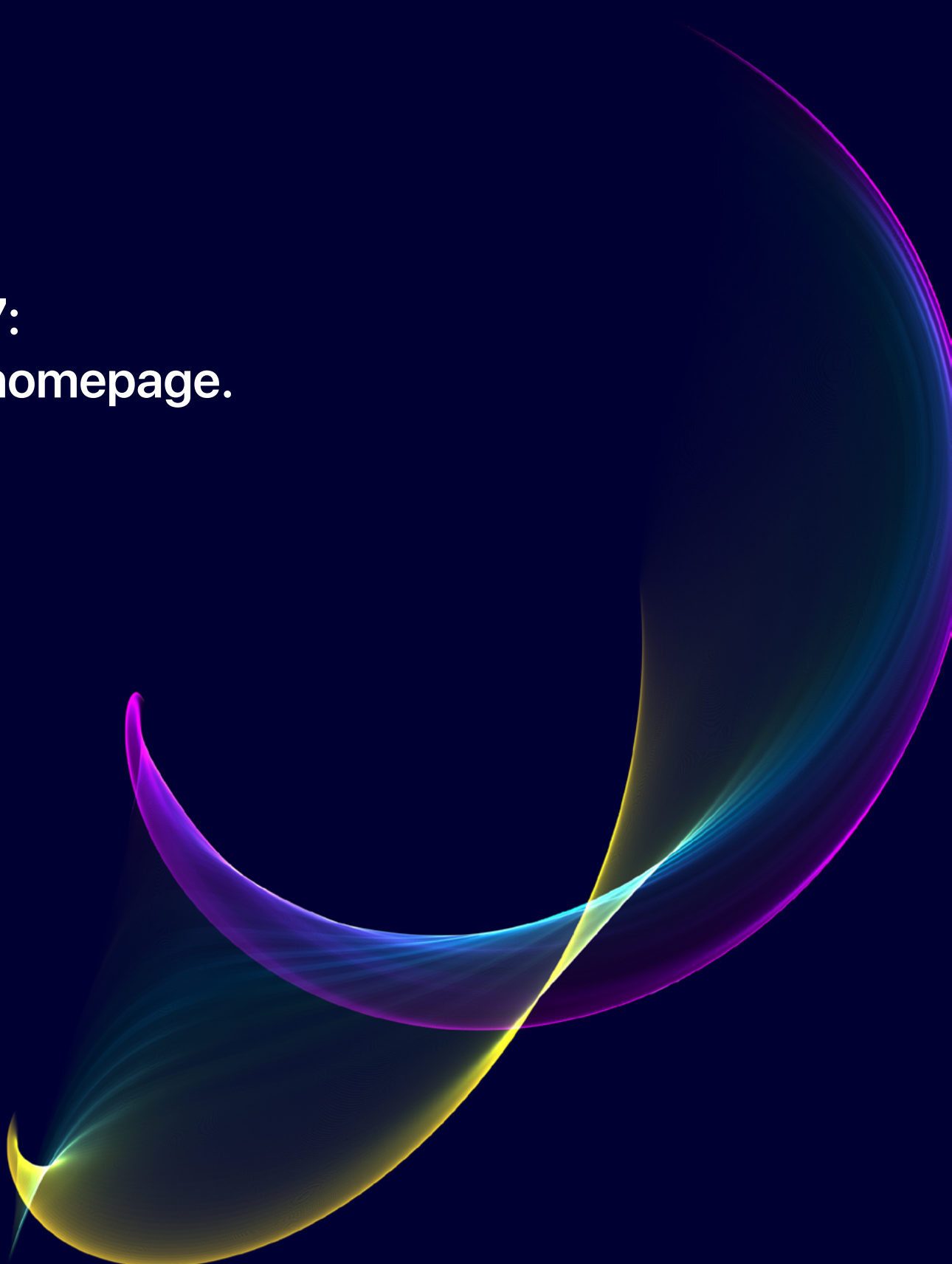
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Task 7:
Your homepage.



Task 7: Your homepage.

First impressions matter. Your intranet's homepage is a mission critical component of success. It makes a statement. It says who you are as an organization through your messaging and branding. It grabs people's attention and influences their time spent on the site. It represents how you care for your organization's members and their well-being. It is critical to the adoption of the platform.

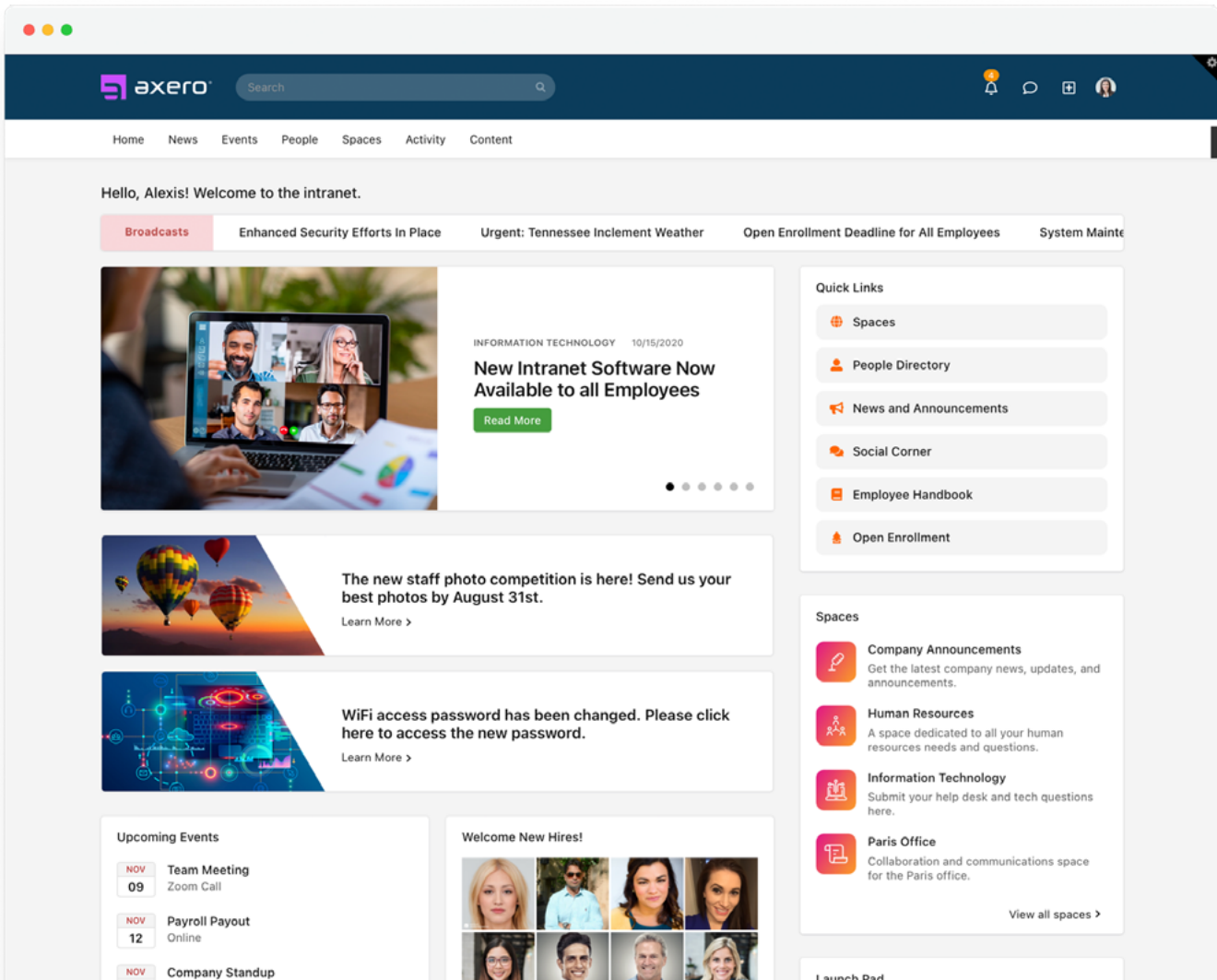
Your Homepage can make or break the success of your intranet project. Treat it with care, just as you would any customer facing home page.

Your Homepage serves as the aggregator. Use it to provide direct access to information your people need and what you want them to access. Here's a list of functionality that is often put on a homepage:

- Corporate News/Announcements
- User Directory / People Search
- Quick Links
- Most Viewed Resources (list)
- Highest Rated Content (list)
- Popular Tags
- Featured Articles (list)
- Photo Carousel (list)
- Quick access to start a support ticket (IT, HR, etc.)
- Featured Spaces & Groups
- Polls or Surveys
- Featured Videos
- CEO or Presidents Blog

Here's what an example homepage might look like:

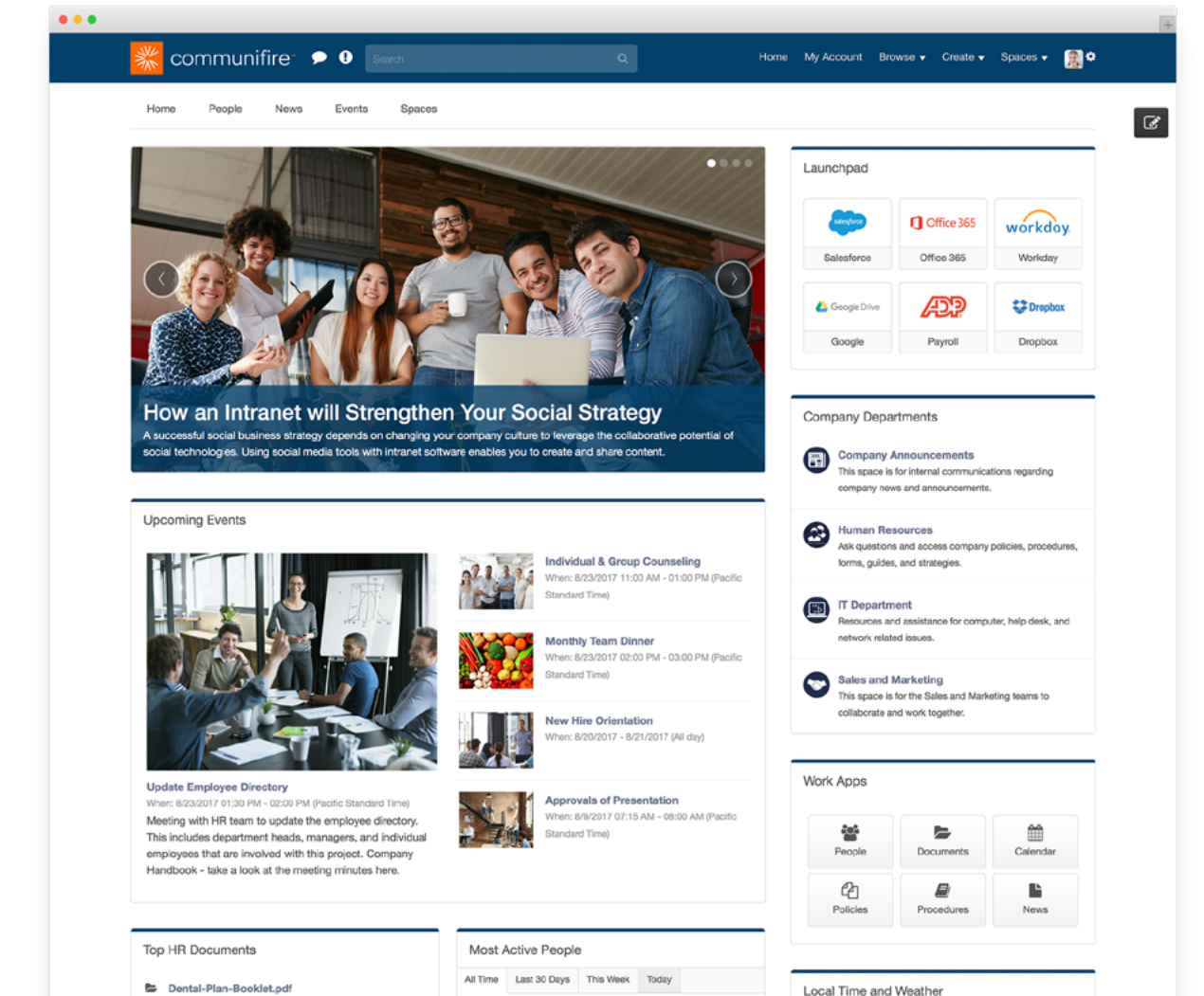
Including the “most viewed” and “highest rated” content on the Homepage allows



people to see what their colleagues are watching, using, and consuming. This helps your content reach everyone in the organization because it plays on their inherent desire to want to know what’s going on.

Here’s another example of an intranet homepage:

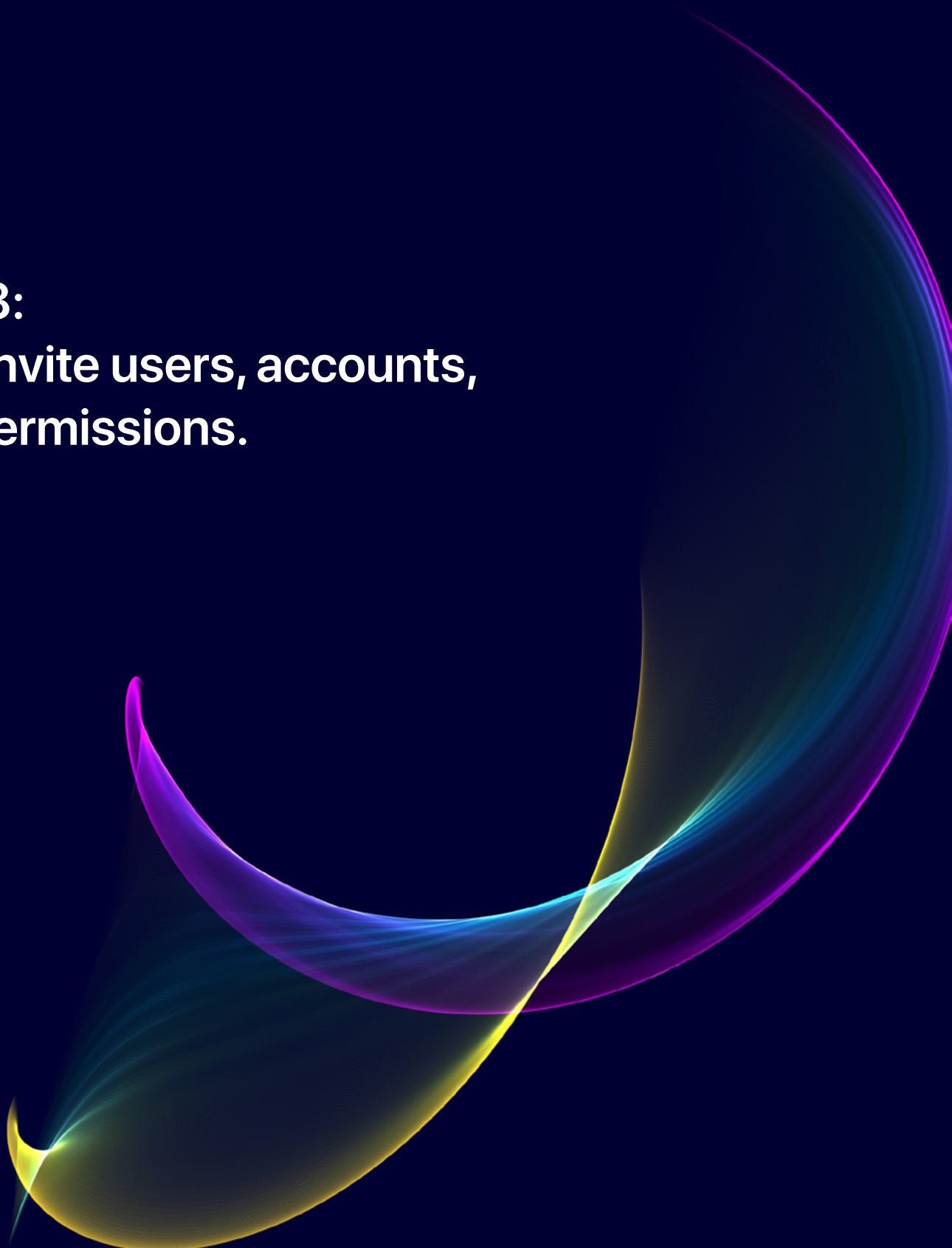
You’ll notice in the right column, we’ve included a few sections: Work Apps, Launchpad, and Quicklinks. Your homepage is also a great place to provide links to important areas in your intranet or additional systems that your employees access frequently.



Goal: Design a Homepage that draws users in. Create a powerful, positive first impression. Your homepage should be dynamic, so that users see new, fresh information each time they visit. And you should provide links to frequently accessed information.

More information: Learn more about how to create your homepage with [Axero's Page Builder tool](#).

Task 8:
Add/invite users, accounts,
and permissions.



Task 8 - Add/invite users, accounts, and permissions.

So far you've documented your "why." You mapped it to Axero's features. And you populated the site with content and made it visually stunning.

Now it's time to start adding users. Just as you wouldn't let anyone walk into HR and start rifling through employee files, make sure users have access to the information they need. While also restricting access to discussions and content they don't.

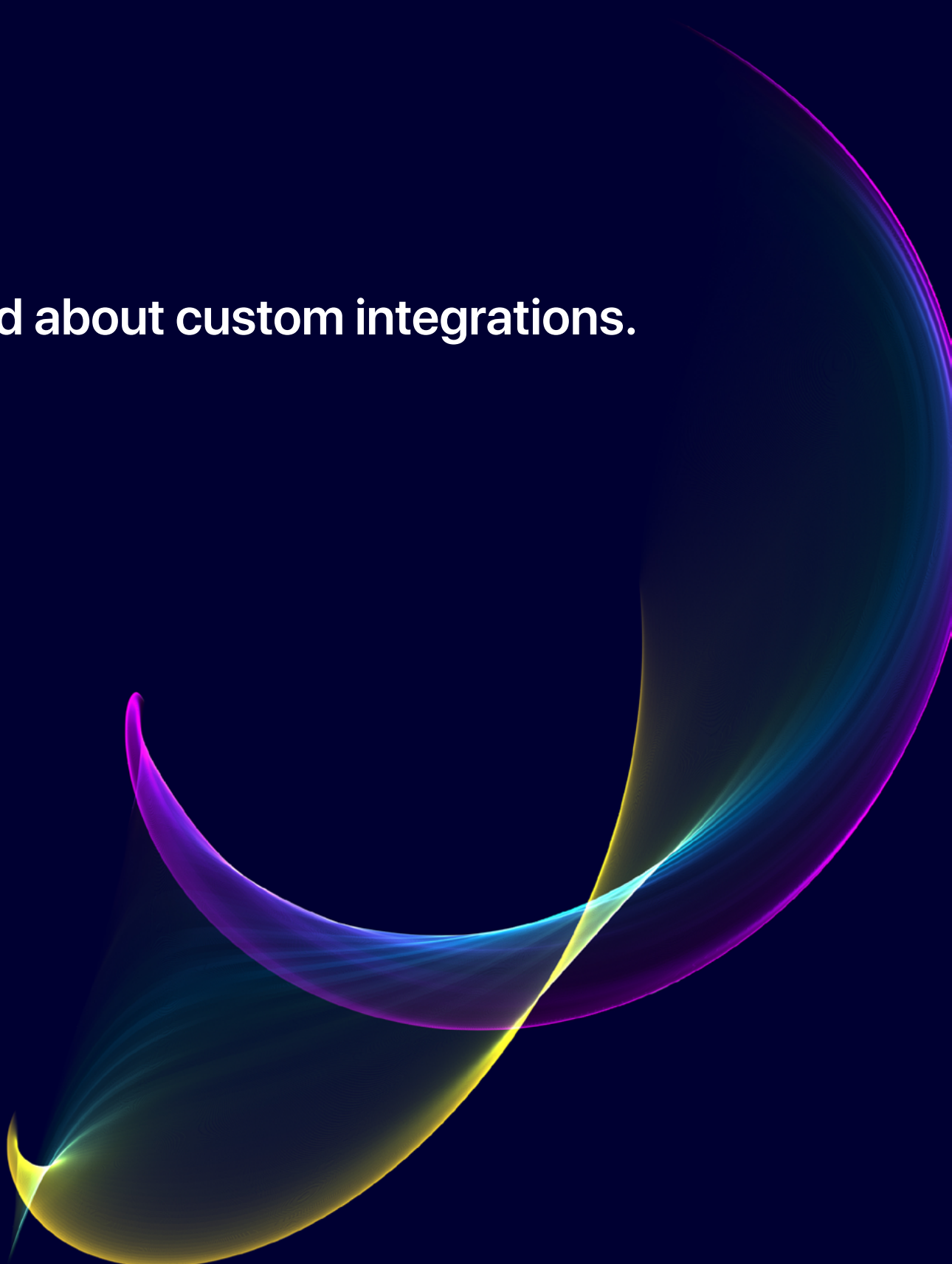
Remember, setting access permissions isn't just about keeping users out of areas they don't belong. It's also about keeping their experience clean and uncluttered. They don't want information they don't need clogging up their activity stream. Setting user access privileges keeps things neat and organized.

Axero's user admin and permissions is intuitive. But if you have questions, our [support community](#) can be a great resource. There's plenty of advice, how-to's, and best practices available to help you learn from the success of others. That's one of the best parts of working with Axero: you never have to do it alone. We encourage you to tap into the vast and valuable experiences of intranet admins who have *"been there, done that"* and are eager to help you learn from their experience.

Goal: Add users and grow adoption by giving them access to the vital content they need.

More information: Learn how to setup [User Roles and Permissions](#).

A word about custom integrations.



A word about custom integrations.

We're often asked about integrations. The topic deserves a small space in this "getting started" guide.

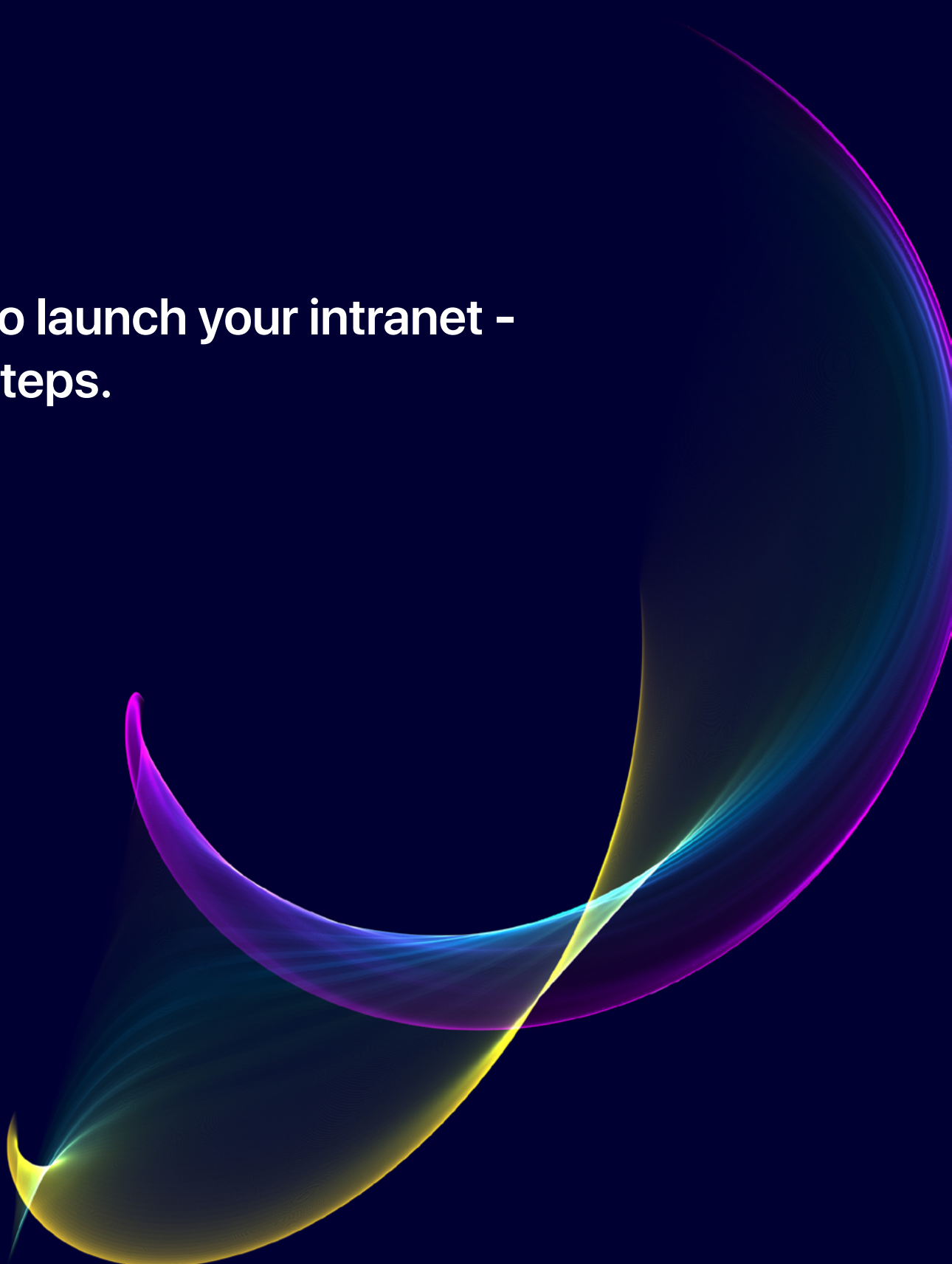
Sometimes integrations with other platforms make sense. For example, using Active Directory (AD) integration to synchronize user account data between systems. Other times, integrations might take more effort than what you need. Rather than direct integration, it might be easier to add a hyperlink to lead people to a time tracking or payroll system.

Let's start by asking the most important question: *why?* What is the purpose for integrating another system or platform? Is it just a novelty? Or does the integration actually add value? If there's a benefit to integration, such as eliminating redundancy, increasing efficiency, or reducing errors and data discrepancy, then an integration makes sense. But, if you can't find value, a simple link from Axero to other system(s) is enough.

If integration does make sense, start by documenting what that integration looks like and how the systems should behave together. Will it be a one-way push of data from one system to another? Or, is a two-way stream of data required to synchronize back and forth between systems? Do these pushes happen instantly or on a timed cycle? Exactly which data fields must transfer? What is the workflow?

While integration work is outside the scope of this guide, it is well within the capabilities of the Axero platform. For more information about integrating Axero with your existing technology stack, please visit the [REST API guides](#) to learn how to work with this tool.

**How to launch your intranet -
next steps.**



How to launch your intranet - next steps.

Getting started with Axero, and learning how to launch an intranet, is a straightforward process when you give it some thought. By following the tasks provided in this checklist, you'll be up and running in a few days or less. If you run into any roadblocks or need help working through these tasks, be sure to [reach out to our team](#). We're very engaged in our customers' success.

Next Steps:

[Axero intranet software](#) - Learn Axero's capabilities, features, and how it can work for you.

[Intranet videos and walkthroughs](#) - These are designed to give you a high-level tour and overview of Axero. Watch step by step while we walk you through features and best practices in Axero.

[Schedule an Axero demo](#) - We'll walk you through the platform and answer any questions you may have.



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