People are not the same. Within an organisation, all staff do not have the same needs for information and tools. These are self-obvious truths.

In the context of enterprise portals and corporate intranets, this means there cannot be any meaningful concept of a generic ‘user’. Yet most portals and intranets focus primarily on delivering corporate content, targeted at the needs of ‘all staff’.

In the long term, portals and intranets will only succeed if they can be made more useful for staff, and more directly tied to their daily activities. Only then will usage increase, and the full value of these tools be realised.

The thought of moving from meeting the needs of one generic ‘user’ to the individual needs of a thousand staff is daunting. What are these individual needs, and how do we address them in a practical way?

‘Personalisation’ offers a potential solution, either by allowing staff to tailor their own working environment, or to deliver information to pre-defined segments.

While personalisation is a core feature (and strong selling point) of portals, success has been harder to achieve. User adoption of personalisation has been patchy, and the effort involved in setting up and maintaining personalisation has proven to be considerable.

The topic of personalisation is a contentious one, and this editorial presents one viewpoint on the situation today, and the potential directions into the future.

UNDERSTANDING STAFF NEEDS

Before starting to discuss the practicalities of personalisation, it is valuable to explore how staff needs can be considered.

In practice, there are three main ways of segmenting staff needs for information, with a number of secondary
considerations. The three primary aspects (or ‘facets’) are:

- job role
- business unit
- geographic location

Of these, job role is the most common way to segment staff needs, recognising that different roles have distinct information needs. For example, a nurse has little in common with an administrator, engineer, call centre operator or sales person.

The seniority of a staff member is also a consideration, as managers and CEOs have different needs from operational staff. (For example, managers would need a range of HR performance management content.)

While this is the most obvious of the facets, it is potentially the hardest one to manage, due to the large number of job roles in any given organisation.

Information can also be segmented according to the business unit that a staff member belongs to. This can take place at many different levels, including division, team and project.

For example, information can be targeted to the ‘consumer products division’, as well as to the ‘personal credit cards unit’ within it.

This type of segmentation is most often seen when implementing news channels, and the required information can potentially be drawn from back-end HR systems or the staff directory.

The last of the three main facets is geography: where a staff member is located. Geography affects how the organisation works, including the underlying legislation, business rules or mix of products and services.

At a simpler level, this also relates to the differing staff services offered in each location. Regional staff have little interest in the head office cafeteria menu.

This is clearly a major consideration for multi-national companies, but should also be addressed by any company whose offices are scattered across multiple sites.

Beyond the three core facets explored above, there are many secondary facets, including:

- project
- nature of employment
- type of customers interacted with
- professional interests or activities
- specific skills or knowledge
- personal interests or hobbies
- length of time with the organisation

While these are considered secondary to the three main facets, they may be very significant in specific organisations or situations. (For example, project is one facet that dominates the way some organisations operate.)

DEFINING PERSONALISATION

‘Personalisation’ is a term very much in fashion at present. It is used by vendors to sell their products, and promoted by website and intranet managers as a way
of delivering a brave new era of functionality.

Separate from debates regarding the merits and approaches to personalisation, there is considerable confusion about the meaning of the word itself.

As the use of personalisation spreads, this confusion has grown. Personalisation is now routinely used for everything from ‘my links’ functionality, to fine-grained targeting of information to specific staff roles.

In order to discuss the current state and future of personalisation, it is necessary to establish some practical definitions. When considering a definition, it immediately becomes clear that there are two separate functionalities and approaches.

At the risk of injecting still more terminology into an already fragmented space, these two approaches will be defined as:

- Personalisation, whereby individual users can choose or configure what is delivered to them.
- Segmentation, where organisations tailor or selectively deliver information or tools to specific audience groups.

**PERSONALISATION**

This covers all situations in which the end user is given the capability to customise or tailor the features provided, or how information is delivered to them.

This includes simple functionality such as:

- my links
- my documents
- choosing portal elements (‘portlets’)

Personalisation also includes richer functionality such as selecting news channels, or setting preferences in HR and travel systems.

This type of personalisation is often assumed in enterprise portal deployments, and is turned on by default. Out-of-the-box, this may allow little more than changing colours and the layout of the portal home page. If more work has been put into personalisation, staff may be provided with richer tools more directly related to their work activities.

While personalisation of this form has been widely deployed, it is far from clear that it has been successful. Anecdotally, only 5-10% of staff within a typical organisation make use of personalisation features, outside of IT or other technical staff.

This means that 90-95% of staff will leave the portal unchanged, returning us to the same ‘one-size-fits-all’ solution we were trying to escape, not the mention the responsibility for designing a solution that meets this broad need.

A survey conducted by Step Two Designs (Grenfell, 2007) tested this anecdotal information. While the results of this survey were somewhat equivocal, what was clear was that there was not a large number of organisations claiming significant user uptake of personalisation features.

With our current organisations, and the staff within them, this type of
personalisation is therefore not a good bet. While easy to implement, it will be of little value unless most staff actively choose to make use of it.

**SEGMENTATION**

Our focus therefore turns to segmentation. Instead of leaving it to end users to configure interfaces, segmentation involves the organisation more actively tailoring what is delivered to specific groups or roles.

This may include:

- targeting the delivery of individual documents
- providing tailored ‘portals’ for specific groups
- segmenting the whole site by audience

There is a strong argument for benefits delivered by segmentation, particular as a way of overcoming the ‘information overload’ experienced by end users.

The challenge is, and always will be, the considerable resources that need to be devoted to planning and managing segmentation, recognising that the responsibility now rests with central teams to ensure that users are provided the right information.

In practice, if five major business units are targeted, this increases the management workload for the portal or intranet by a factor of five or more. Each business unit must be researched to understand the differences in needs. Every piece of new information must now be marked as relating to one of more of the target groups.

With corporate information teams already stretched in resources, it is difficult to see how segmentation can be easily and viably put into practice.

**LOOKING AT THE BIGGER PICTURE**

Stepping back, the interest in personalization can be seen as part of the broader tension between ‘top-down’ and ‘bottom-up’ management of information. Perhaps the goal is then to find the right balance in the short term, rather than one extreme or another.

A model for thinking about this is shown in Diagram 1.

Scenario A is the “now” scenario, typical of most intranets and information management strategies.

Information is mostly published at the corporate level, delivered to “all staff”. The closer you get to any one staff member, the less the information is targeted to their needs. All staff are basically considered the same, and there is no personalisation or tailoring.

Scenario B is the “ideal” state, as outlined in the web 2.0 and enterprise 2.0 world view.

The individual is at the centre of all things, and information is specifically delivered to meet their specific needs. This may be via customisation, tailoring, or self-driven social networks. This recognises that organisations are made of up individuals, who need to be effective and engaged.
There is, however, a huge change from scenario A to scenario B. As discussed earlier, this would require widespread adoption of personalization, and a high degree of sophistication in its use.

Looking beyond traditional personalization or segmentation, the use of “enterprise 2.0” and “social” tools offers another way of delivering this vision, but these approaches are still in a very formative state.

Scenario C is perhaps the middle ground we can work towards in the short term.

While information is still published at the corporate level, there is tailoring of information at business unit level. Call centre staff have relevant information delivered to them, distinct from that delivered to sales staff, engineers, or admin staff.

This is relatively easy for intranet and information management teams to handle. There may be anything from a few to many dozen business groups to target, but this is much easier than trying to address the needs of thousands of individual staff.

Over time, scenario C can then be supplemented by the increasing use of user-driven personalization, deployed to match changing corporate cultures. This allows a steady evolution to scenario B.

**SUMMARY**

Personalisation (and segmentation) are both the potential salvation of portals and intranets, but are also amongst their biggest challenges. While the potential benefits are considerable, so are the costs, and teams must find practical ways of proceeding.
Rather that jumping directly to user-driven personalization, organizations should first consider business-unit level segmentation. As staff skills and behaviours change, the opportunities for personalization can then be explored.

For those organizations taking this path, recognize that this is still uncharted territory. Success can undoubtedly be found, but beware of the rocks.

REFERENCES