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Opinions In Depth

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WEBSITE GOVERNANCE: A HOW-TO GUIDE

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Website creation and maintenance technology has matured over the last decade, but governance has remained a stubborn obstacle. While many other hurdles have been cleared (for example, portal pricing has been helped by a 90% decrease in software costs and product selection has been made easier by standards and better products from established vendors), governance issues are due to deeply seated cultural and bureaucratic circumstances that are difficult to address. From 2001-2003, most of my clients' website questions were about vendor viability, pricing, and product features. By 2005, governance was clearly the leading topic. In a proper project plan, governance would be addressed early - before the website was released into production. Around 20-30% of large organizations implemented website governance before release, but most treated it as an afterthought and only asked for assistance once it was in production and problems emerged. Many site owners feel a need for governance, but what does governance really mean and where should they start?

Behind the Analysis

A view into the historical and market precedents that guide this analysis:

Don't Blame the Tool: Many technology implementation problems are really cultural, process, and organizational problems in disguise.

New Technology Requires Old Disciplines: Basic project management discipline, such as defining goals and metrics, are essential but often overlooked in the rush to implement new technologies. There is nothing new about these disciplines, but applying them to new situations can be challenging.

The purpose of governance is to resolve disputes before they occur. Once website users become embroiled in arguments about how a taxonomy should be laid out,

whether someone had the right to change a document without approval, or whose page design looks best, it is often too late to resolve the issue without political implications. If these issues can be foreseen and settled with a clear head while the issue is academic, these problems can often be avoided.

Website governance is much easier to address in the early stages of project planning, when issues of ownership and responsibility can be treated more academically. Imposing governance later in the cycle is often seen as an immediate change in employee's responsibilities, which may be resisted. By planning ahead, an organization can give advance warning of additional roles or staff that may be needed, which allows time to shift tasks around or hire content reviewers. If governance is being addressed for an existing implementation, it should still be phased in over time to allow affected parts of the organization a chance to accommodate the changes in responsibilities.

ELEMENTS OF GOVERNANCE

An organization reviewing governance needs to address the following elements:

Scope

A governance document should clearly state the scope of the project upfront. For example, a website governance document could pertain to all web sites, the intranet only, an SAP Portal only, or just one division.

Goals

Stating goals should be part of any project. So hopefully this has already been completed for the website project, in which case these goals can be adapted from an existing document to kick start the governance process. If not, they can be written under the auspices of the website governance subproject.

A statement of the purpose of the website is important because:

1. It helps guide the website processes and organizational responsibilities that the governance will address
2. It involves executives at a level they can understand and agree to
3. It provides a basic level of agreement that acts as a foundation to retreat to in

case disputes arise on specific processes later

4. It acts as a safety net to catch situations not specifically addressed by the documented processes, but whose path should be clear once the underlying goals are stated

Sample website goals that could be stated in a governance document include:

- Decreasing ramp-up time for new employees by helping them find information needed to do their jobs
- Fostering communication and collaboration across groups, which in turn breaks down barriers within the organization and improves the efficiency of cross-functional tasks
- Improving the speed at which decisions are made and the quality of those decisions by providing decision makers quick, timely information and providing knowledge frameworks that group all the types of information an expert should review before making a decision
- Gaining control over the explosive increase in the amount of structured and unstructured information being created in the enterprise

Website Processes

The largest portion of the governance document is usually the set of processes required to keep the website up to date. The document should address:

- The Governance Process
 - Connections to other governance committees (for example, corporate governance, privacy/security policies, or web governance)
 - How often the governance committee meets
 - How someone can request a change to the governance
 - How to request representation on the governance committee
 - How to find a committee member
- Compliance Processes
 - How will compliance with the governance procedures and policies be

checked?

- What is the penalty for non-compliance? (Hint: Simple and vague is the best way to go here)
- Maintenance (Runtime) Processes
 - Page design (template standards, toolbar, etc.)
 - Meta-tagging procedures
 - Bulk publishing of a large number of documents
 - New site request
 - Page update/publishing process (usually divided into slow, fast, and critical lanes depending on the type of content)
 - Taxonomy changes
 - Patch and new version installation
 - Feeds to and from other systems
 - How to obtain training (for a new subsite owner or web programmer)

Note: The list of website processes in the governance document should not include the project plan or the processes required for the first deployment. Those should be kept separately.

Organization and Responsibilities

The heart of governance is a description of the roles required and who will assume them. These roles include:

- Executive sponsor
- The governance committee chair and members (necessary in order to give credence to the rest of the governance)
- Web Information Technology Owner (selects technology and technology approaches)
- Website Business Owner (sets goals and priorities)
- Taxonomy Owner (librarian)
- Template Designer (final authority on look and feel issues for the website)

- Departmental website liaisons (coordinate content creation, taxonomy changes, departmental newsletter creation, and other issues relevant to their department)
- Break/fix maintenance (monitors performance and carries pager)
- Code support (creates reusable components for the website for integration, navigation bars, report management, etc.)

Timeline

Since many of the roles and processes associated with website governance are new to the organization, they should be phased in explicitly over time. A timeline section describes how these will be phased in and describes recurring activities as well.

- Organization – Describes how new roles will be phased in
- Technology – When the website will go live, schedule for patches, and maintenance windows (if needed)
- Content - When major content is expected to be ready for publication
- Applications – When major systems will be connected to the website
- Processes – When compliance will be expected with the processes outlined in the governance document

Metrics

Measurement should be a key component of all projects, particularly once goals are clearly stated. Metrics can be created by identifying problems that the website is meant to solve. For example, if a goal of the website is to facilitate inter-departmental communication, a metric for the number of sites that address cross-functional processes could be created. Historically, qualitative measurements (taken through satisfaction surveys) have been more effective at showing improvement than quantitative measurements (from web logs and the like). Targets for metrics should be stated and improve over time. A common metric is the number of sites compliant with design standards, with an increasing goal over several years.

GOVERNANCE MODELS

Formal governance exists on a spectrum from fully centralized to fully decentralized. The sweet spot – a federated governance model - is about two thirds decentralized

and one third centralized. The federated model has proven to be most palatable initially and most resilient over time. However, a website owner must aim for a type of governance that is close to that of the IT organization for the culture to accept it. For example, trying to implement a federated governance model in a command and control centralized environment will probably be resisted by those in control as counterproductive power sharing.

Centralized

The typical command and control structure is the centralized governance model, where a strong central organization owns all roles and sets and enforces all processes. While this was the predominant business model through much of the 20th century, it is now rare in large organizations (>5000 employees) due to the size of the hierarchy needed and the domino effects of weak links in the chain of command.

Decentralized

The governance pendulum has swung towards the decentralized model over the past 20 years. A pure decentralized model is the “Wild West” of governance, with no central rules or authority and each group (often informally defined) sets its own direction and rules (or lack of them). In its pure state, the decentralized model offers total freedom but no consistency, guidance, or dissemination of best practices.

Federated

The federated model exists as a happy medium between command-and-control and the Wild West. Much like the government of the United States, a federated system has a central or federal entity and a number of loosely connected states beneath it. The central authority controls only those roles and processes that benefit all of the states such as purchasing the portal software and setting basic look and feel standards. The states (business units, communities, etc.) are then allowed a great degree of freedom within the basic structure, such as what they wish to publish, if they want a newsletter, and some tweaks to the design template. Most organizations in the U.S. currently have or are moving towards a federated governance model, while western European companies skew more towards decentralization.

SUMMARY: Web governance should address the site's scope, goals, processes, organization, timeline, and metrics. As organizations become increasingly federated, a written governance document is essential to lay the path for clear ownership and responsibility over website creation and maintenance activities.

ENTERPRISE TAKEAWAY: Governance needs to be addressed early in website planning. Formally laying out governance policies in advance will reduce political headaches later.

VENDOR TAKEAWAY: Management facilities, policy-based administration, and delegated administration capabilities (granting access to subgroups to own a subset of a website) need to be present and polished in site building software. Absence of these features implies the software has not been proven in large, complex, hierarchical organizations.

Craig L. Roth KnowledgeForward provides assistance in planning and executing knowledge management and collaboration strategies and marketing programs. Mr. Roth is an alumnus of the META Group, where he covered enterprise portals, web site development and rich internet applications.

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