



# Intranet Governance Playbook

December 12, 2019

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# Overview

A blue-tinted night photograph of a city street intersection. The scene is dominated by tall, multi-story buildings with many lit windows. In the foreground, a wet, reflective street shows long, horizontal light trails from moving vehicles, primarily in shades of red and white. A traffic light pole with yellow lights is visible on the right side. The overall atmosphere is urban and nocturnal. The word "Overview" is overlaid in a large, white, sans-serif font on the left side of the image.





## PURPOSE

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1. Define necessary roles in the governance process  
Product stakeholder, product owner, committee members, content lead, etc.
2. Define roles and responsibilities required for content governance
3. Define ownership of structure and content on the site  
Homepage, News, OpCos, Departments, Facilities, People, Events, Tools & Apps, About Us, Topics, Sitemap, Taxonomy, Analytics, Team Sites, ChatBot, Social, Yammer, etc.
4. Define policies for site maintenance scenarios
5. Determine the processes required for content governance

## OBJECTIVE

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1. Outline the roles, responsibilities, processes, and policies required for each area of content governance for the intranet

# Where we've been

| Date  | Item                                                                   | Description                                                                                                                                                                                                                                                                                           |
|-------|------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 11/07 | <b>Workshop #1</b><br>Ownership / Roles<br>and Responsibilities        | <ul style="list-style-type: none"><li>• Identify and define necessary roles in the governance process (product stakeholder, product owner, committee members, content lead, etc.)</li><li>• Detail out roles and responsibilities</li><li>• Define ownership of structure / content on site</li></ul> |
| 11/08 | <b>Workshop #2</b><br>Process and Policies                             | <ul style="list-style-type: none"><li>• Policy: Sitemap, Taxonomy, Content Maintenance, Integration, Access Document Retention, Naming Conventions, Legal</li><li>• Process: Updating IA, Provisioning Pages/Sites, Granting Access, Auditing Content, Analytics</li></ul>                            |
| 11/12 | <b>Workshop #3</b><br>Content Rules<br>Compliance and<br>Communication | <ul style="list-style-type: none"><li>• Content management workflows</li><li>• Content Rules: example detailed processes</li></ul>                                                                                                                                                                    |



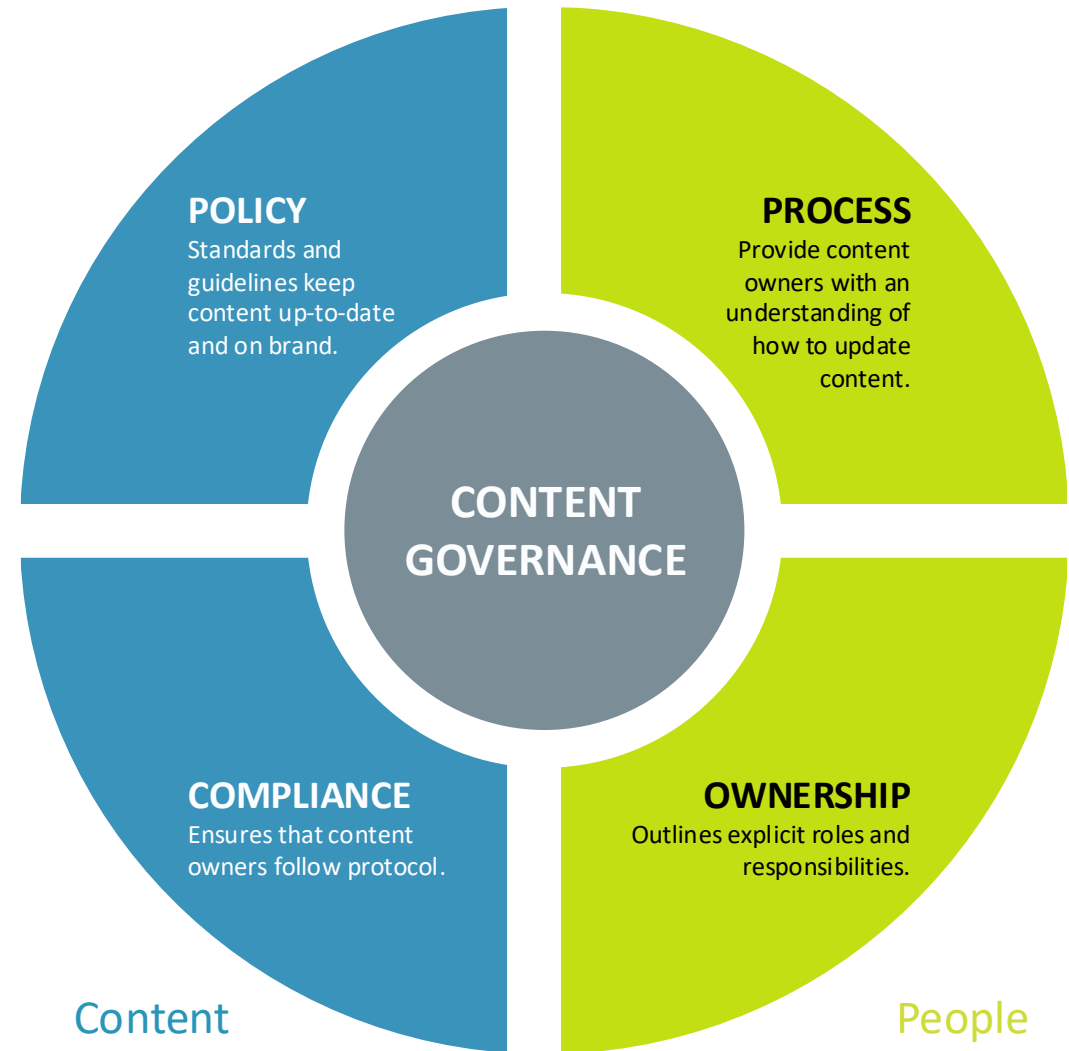
A blue-tinted night photograph of a city street. Tall buildings with many lit windows line the street. In the foreground, there are light trails from cars moving across the wet pavement, which reflects the city lights. The overall scene is urban and dynamic.

# Governance Overview

# What is Content Governance?

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A strong governance plan determines **who** is responsible & accountable for **what**, **when**, and **how**.



# How do we ensure success?

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- 1) Clear ownership
- 2) Adequate authority and empowerment
- 3) Formalized responsibilities; recognized effort
- 4) Enforcement mechanisms
- 5) Proper support, training, and development

CONTENT  
GOVERNANCE



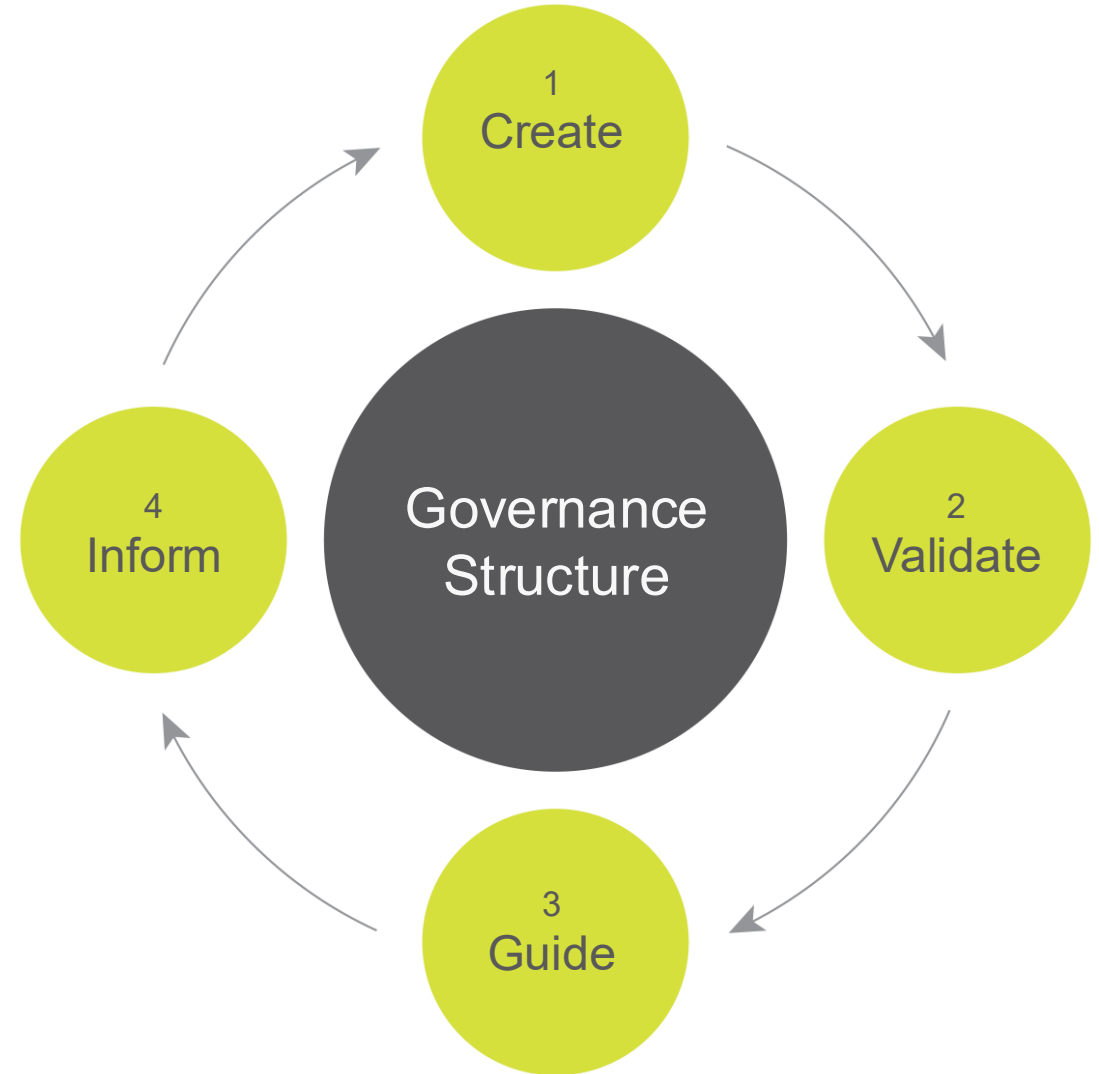
# Content governance steps

Effective governance can help manage content delivery and maintenance, as well as any content model and taxonomy implementation.

Governance board

Intranet center of excellence/Core content team

OpCo/Department teams





# Governance Interview Findings

What we heard



# Employees desire governance

This winter we interviewed employees from various OpCos, departments and locations to:

- Assess understanding of existing ownership, process, policy and compliance
- Clarify nuances and requirements around security, technology and legal risks
- Gather feedback, pain points and goals for the future experience
- Uncover opportunities to establish or improve governance as Exelon knows it
- Present key themes and detailed findings to the core team...

## We heard the intranet is currently lacking

- A clear purpose
- Buy-in from leadership
- Dedicated resources to create and manage content
- Consistency across the experience
- Process to save time
- Policy to support conversation
- Accountability
- Data to inform decisions
- Training for onboarding as well as proper handoffs for changeover
- A centralized hub to store reference documentation
- Regular meetings and communications



## Most employees we spoke to are feeling

- Positive and hopeful for what governance can help accomplish
- Stretched thin with all the work that needs to happen
- Lost in the wild west without guidelines or rules
- Ineffective on a platform/project not prioritized company-wide
- Eager to be partners creating user-centric, data-informed content

## Summary of governance findings

- Structure will bring more freedom
- Prioritizing the intranet requires allocated resources
- Too many unknowns = undeveloped potential
- Make everyone aware of the intranet's presence and purpose
- Partner on data-informed, user-centric content

# Content Governance Models

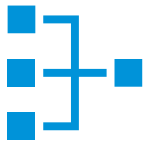
A blue-tinted photograph of a city street at night. The scene is dominated by tall, multi-story buildings with many lit windows. In the foreground, a wet street reflects the lights, and there are long, horizontal light trails from moving vehicles, suggesting a long-exposure shot. The overall atmosphere is urban and modern.



# Content governance factors

Implementing content delivery and maintenance for the intranet requires the management of multiple complexities.

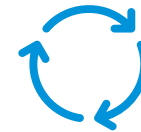
Three stand out:



**Upgraded  
Systems**

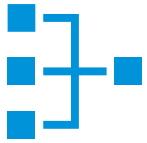


**Many Stakeholders  
+ Content Owners**



**Evolving  
Standards**

# Governance complexity drivers



## Upgraded Systems

Unify content delivery from SharePoint

Potentially integrate APIs from other systems

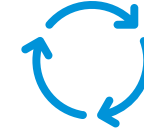


## Many Stakeholders + Content Owners

Drive change and improvement through communication

Collaborate to understand business, market, and technology requirements

Drive consistency of voice and style for all content



## Evolving Standards

Manage digital content processes and tools to meet changing business needs and user preference

Optimize the way we operate and the results that are delivered

# Content governance approaches



## 1 CENTRALIZED

Digital governance and operations aligned in one organizational group / role

Other groups act as customers of a central team



## 2 FEDERATED

Digital governance is centralized

Some digital content is subject to central approvals

Digital operations are shared among entities



## 3 DECENTRALIZED

Digital governance and operations are distributed among various entities and decentralized

Digital content is distributed and approved within distributed teams



# Recommended approach: federated

## Digital Governance

- Members: Comms Team, OpCo Content Teams, IT, Product Owner



## Global Content

- Members: Core content team
- Role: Owns overall digital experience; monitors, enforces, and evolves governance standards; provides product management for CMS and content/experience production support

## Internal Content Providers (Departments)

- Members: Department content teams
- Role: Provides trusted, department content to establish credibility and positions Exelon Connect as the trusted authority

## Content Delivery Management

- Members: IT
- Role: Delivers technology to enable content operations; controls setup of content types, CMS design, etc.

## Digital Governance Board

Provides vision, sets goals and objectives, makes strategic decisions about digital presence, content model and taxonomy, is the final authority on policies and standards

# Content governance: what do we look at?

What are we looking to ensure is cared for through content governance?

- Content guidelines, as they evolve and grow over time
- Content development, managed across the organization
- Editorial calendar, including news and events
- Metadata strategy, such as tagging and page descriptions
- Information architecture and taxonomy
- Process workflows for publishing and requesting features
- Content types updates

## Questions we need to continually ask...

- How do we keep Connect fresh and up-to-date?
- How do we better support our various roles and audiences?
- What structures need to be in place to deliver value?
- What areas offer the most opportunity for improving communication and collaboration?
- How can we align the site activities with the goals of the company and the OpCos?
- Are there synergies that can be created between departments/locations?
- What ways can we reduce inefficiencies and duplication?

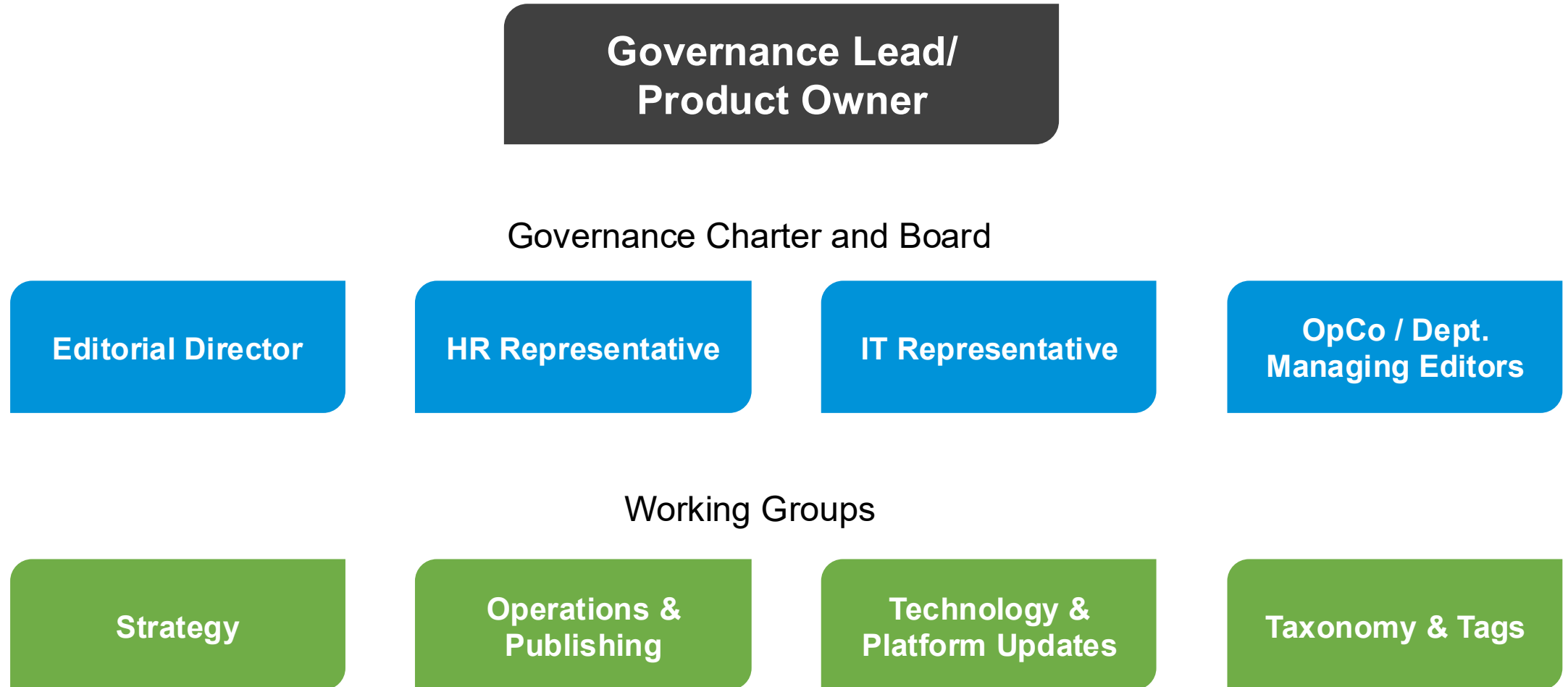


A blue-tinted photograph of a city street at night. The scene features several tall buildings with many lit windows. In the foreground, a wet street reflects the lights, and there are long, horizontal light trails from moving vehicles. A traffic light is visible on the right side of the frame. The overall atmosphere is urban and nocturnal.

# Organizational Roles and Responsibilities



# Content governance board structure



# Content maintenance roles

## Content SME

- Responsible for providing knowledge and subject matter expertise to Editors

## Content Editor

- Responsible for creating and editing content and applying metadata as part of core content team or OpCo content team
- Responsible for making updates to content based upon review or regular reviews
- Responsible to reaching out to Content SMEs to validate and receive the right subject matter expertise

## OpCo Managing Editor

- Responsible for approving content and metadata for publication and determining if Editorial Director or Regulatory review is required
- Responsible for approving updates to content based upon regular reviews and updates
- Responsible for reviewing and validating content to prevent duplication and ensure relevance

## Editorial Director

- Responsible for content experience of digital ecosystem and general oversight of the ecosystem
- Responsible for approving content and metadata for publication when appropriate
- Responsible for recurring audit of Connect content to ensure optimization and relevance in concert with Department Leads and OpCo Managing Editors
- Responsible for approving updates to content based upon regular reviews and prioritized updates

Note: roles ≠ people necessarily

# GOSP = accountability

- **Governance (G)**

The accountability to set policies and practices that create the boundaries that guide the development of methods and procedures to achieve outcomes assigned to that function

- **Oversight (O)**

The accountability to critically monitor, assess and evaluate conduct

- **Support (S)**

The accountability to provide supplemental resources to organizations doing the execution on an agreed-upon basis

- **Perform (P)**

Execution of the function. The accountability to manage, provide appropriate resources, schedules, scope and detailed procedures to implement those plans as necessary and to deliver quality work products of the function



# Roles & responsibilities

|                                   | Content Authoring | Content Editing | Content Review | Content Approval | Publishing | QA    |
|-----------------------------------|-------------------|-----------------|----------------|------------------|------------|-------|
| Product Owner/<br>Governance Lead | O G               | O G             | O G            | O G              | O G        | O G   |
| Editorial Director                | G                 | G P O           | G P O          | G P O            | G P O      | G P O |
| OpCo Managing Editor              | O                 | O               | S              | S                | O          | O     |
| Content Author / Editor           | P                 | P               | S              | S                | P          | P     |
| Content SME                       | O S               | O               | P S            | P S              | S          | O     |

# Roles & responsibilities detailed

- Intranet COE: A group, including the Governance Lead/Product Owner and Editorial Director for people to contact to help them create pages and get guidance on content maintenance
- Governance Lead/Product Owner: responsible for overseeing requested adjustments to processes and policies as well as enforcing current policies. Also responsible for Connect as a whole product, beyond editorial. Will vet features and functionality updates, new templates, and requested webparts
- Connect Editorial Director: Is in lock step with the other OpCo editors and is ultimately responsible for the quality of Connect content. Responsible for meeting with Content Authors/Editors to audit content. Owns metadata, taxonomy, and tagging strategy. Facilitates the proper use of metrics and analytics for the audit process. Ensures continued relevance of content on Connect.
- Department Editors: responsible for producing content for Exelon Connect for their area, such as HR
- OpCo Managing Editor: responsible for the final quality of the content from the OpCo. Will approve the pages created by the Authors/Editors
- OpCo Editors: responsible for producing content for Exelon Connect for their area
- Content SMEs: People that understand what is supposed to be communicated. Would be distributed across the OpCos

# Content governance: proactive vs. reactive

## Proactive:

- Active reviews where required (e.g., company policies and news)
- General editorial processes (outlined below)
- Product ownership
- Taxonomy oversight
- Enforcing editorial oversight of content, where appropriate
- Overseeing the intranet as a whole

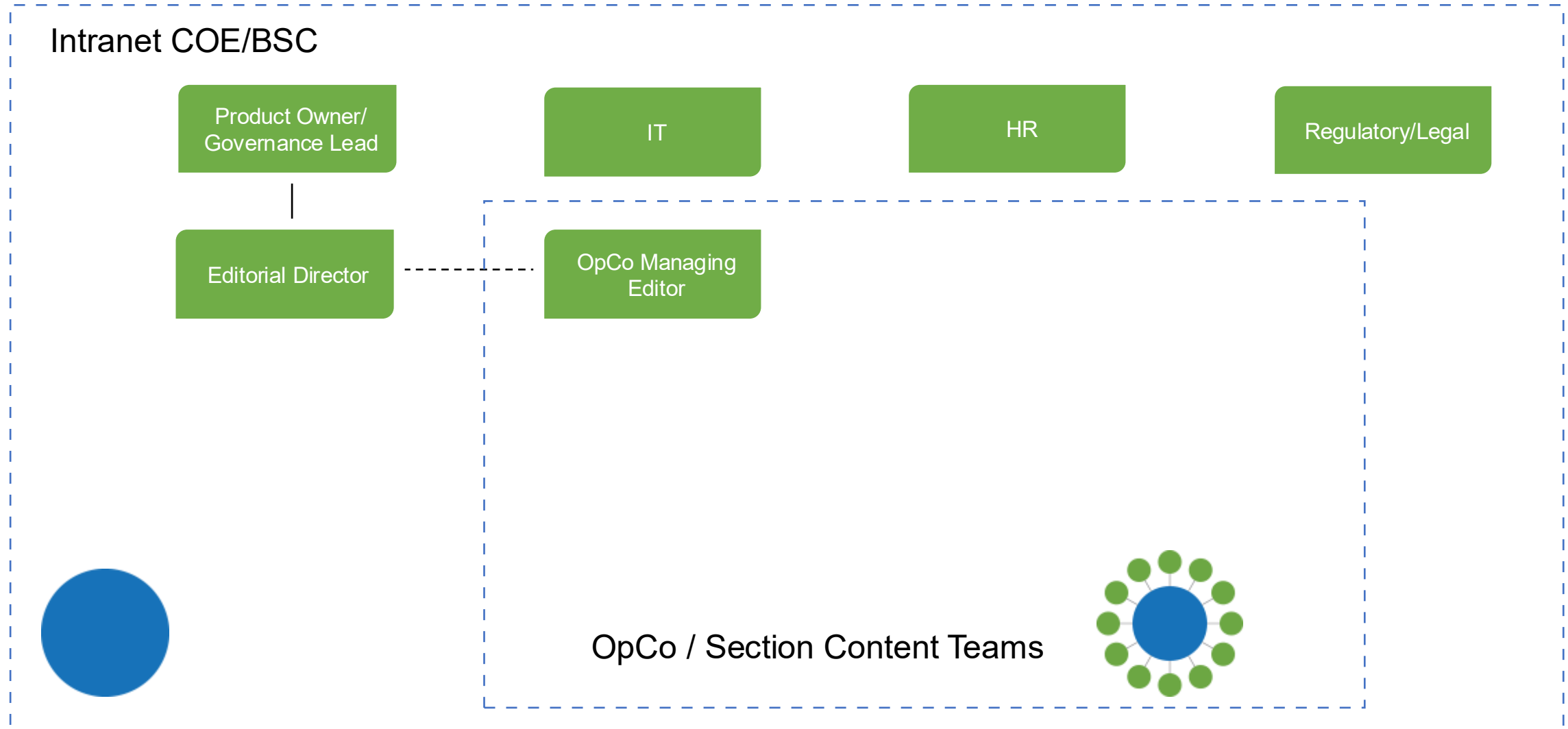
## Reactive:

- Moderating comments on content
- Responding to product enhancements and tools and apps requests
- Assessing proposed changes to taxonomy
- Overseeing the intranet as a whole

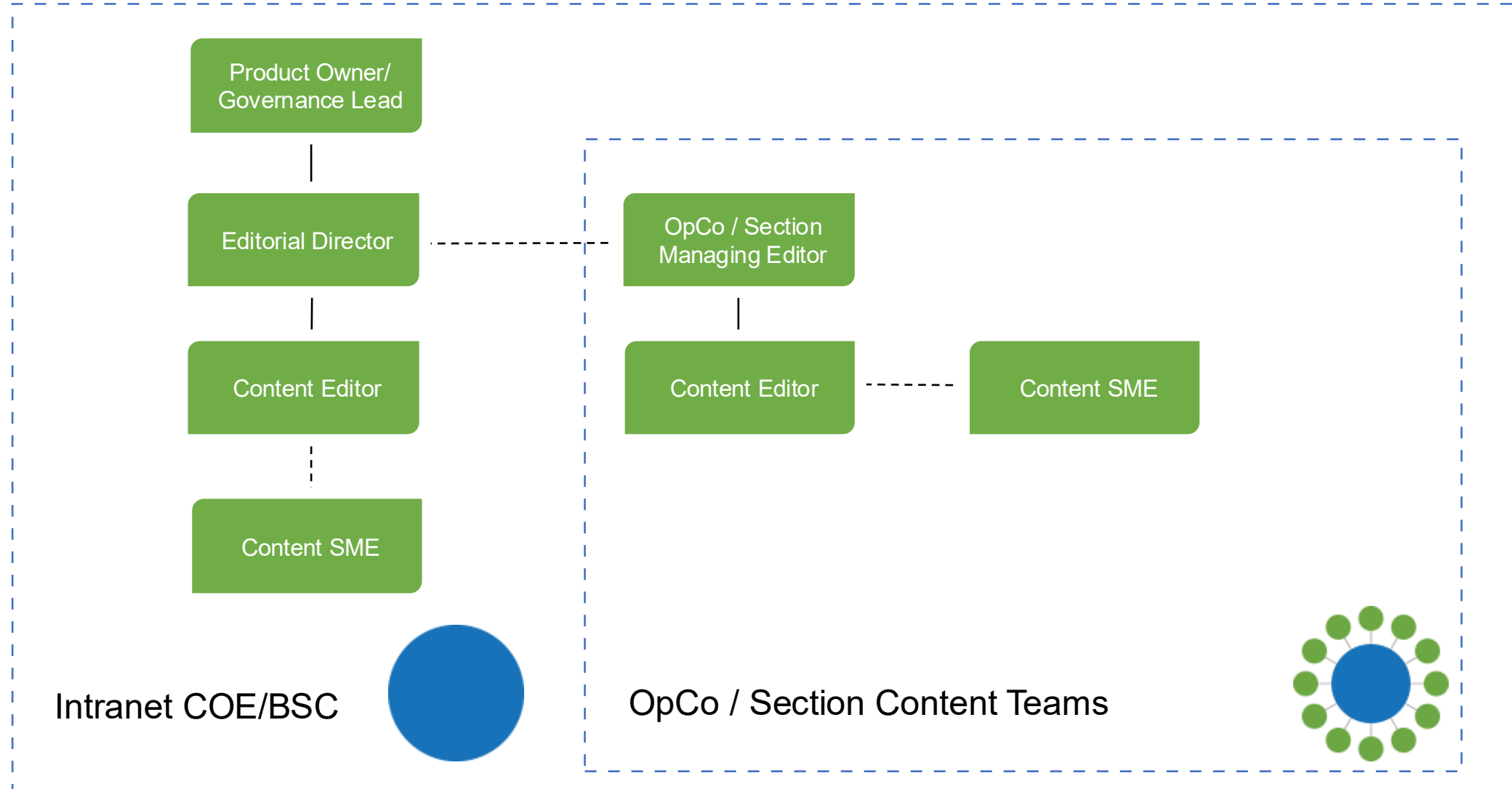
Validate



# Content governance organizational structure



# Content maintenance organizational structure

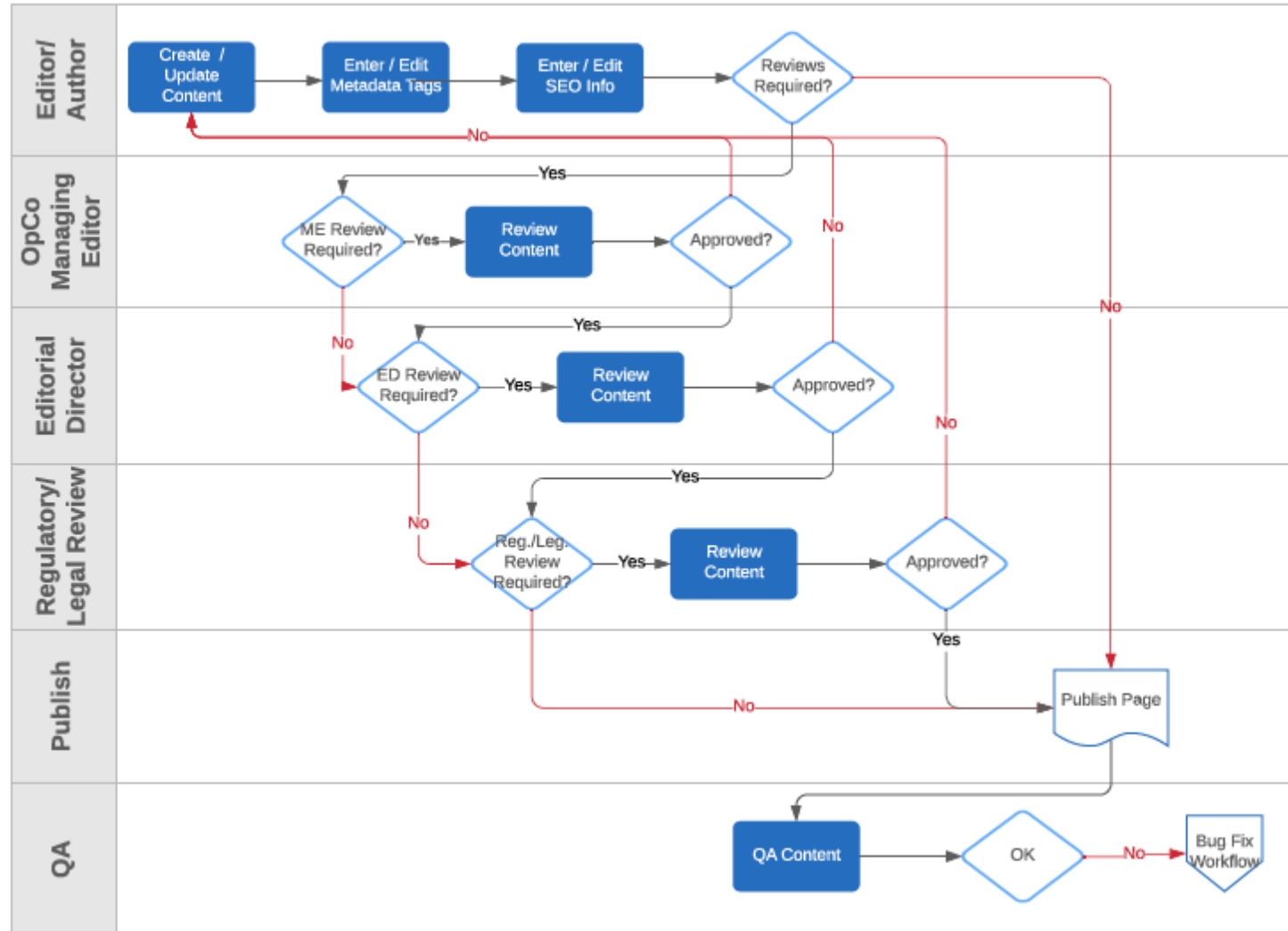


# Editorial Workflows

A blue-tinted night photograph of a city street, likely New York City, featuring tall buildings and light trails from traffic. The text "Editorial Workflows" is overlaid in white.

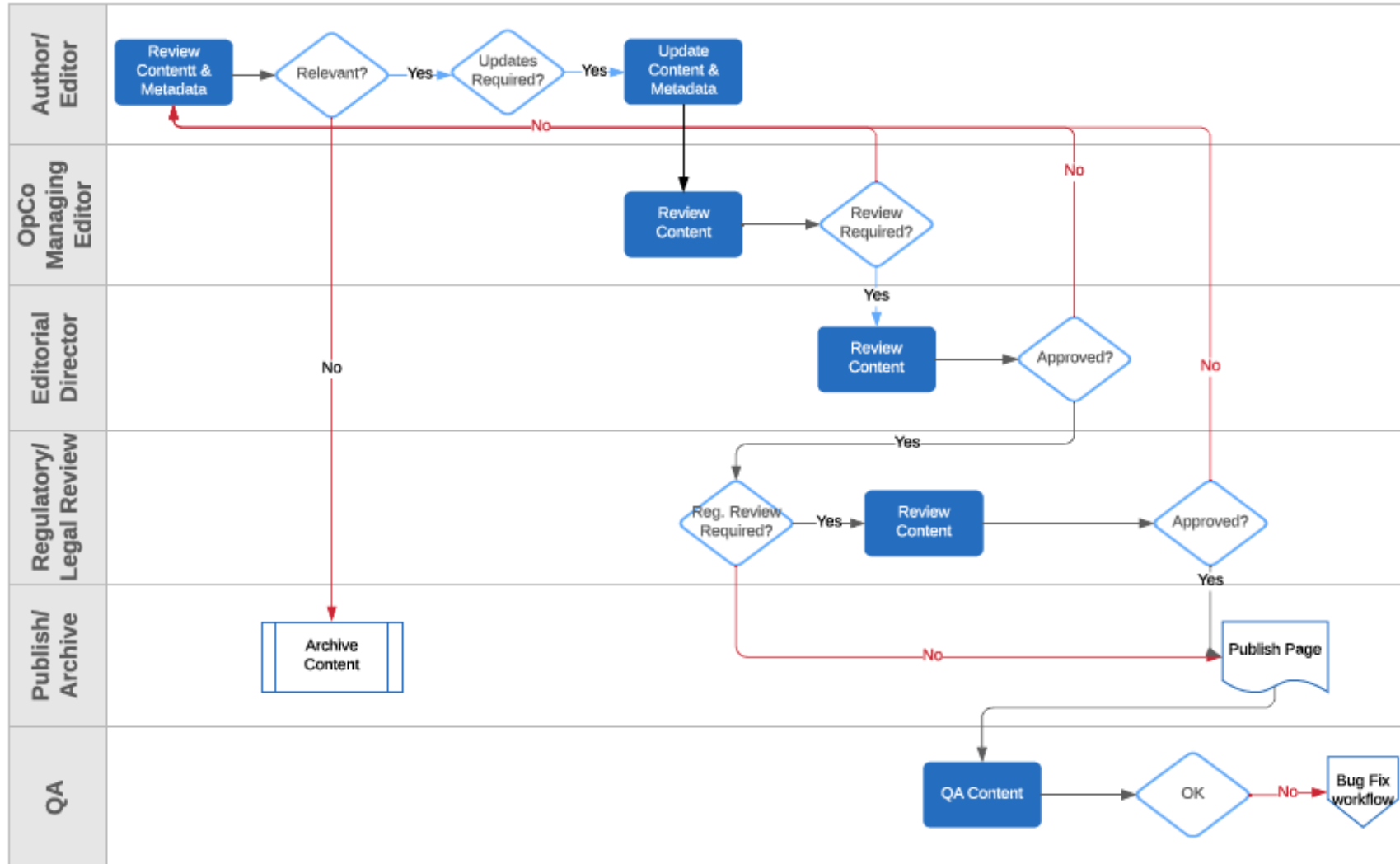


# Base editorial workflow

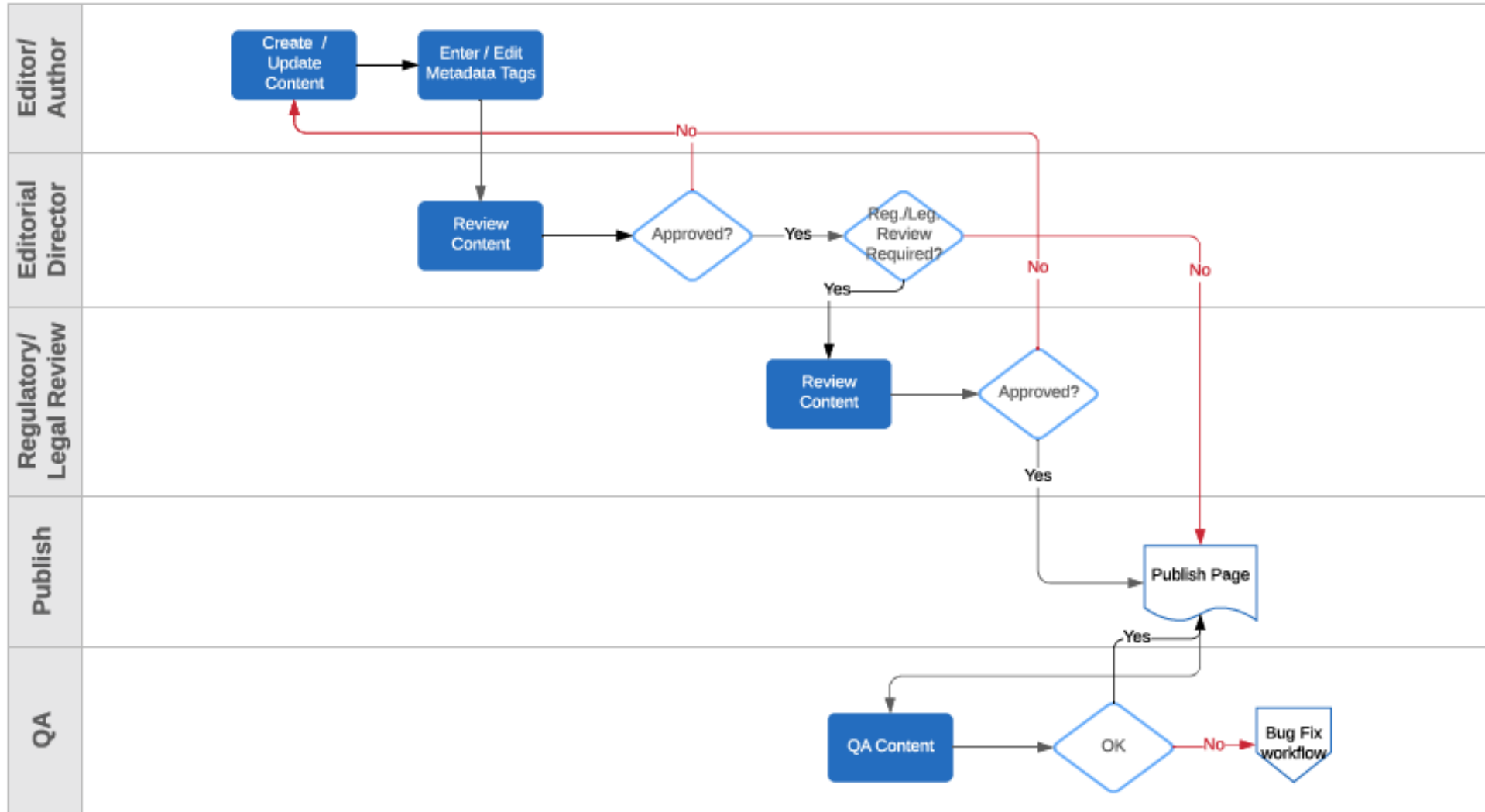




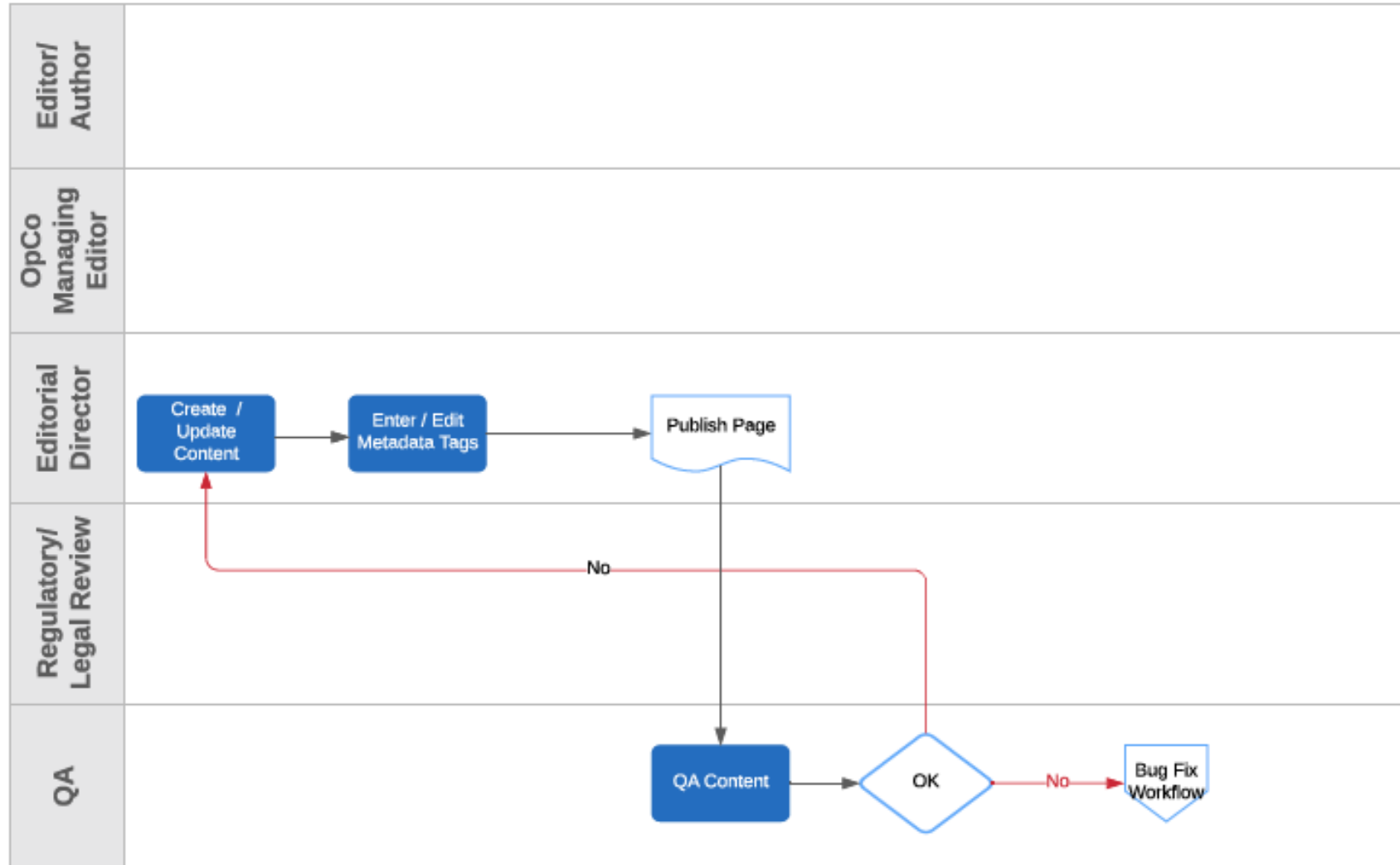
# Update/archive workflow



# Core team/BSC workflow



# Emergency/bug-fix workflow





# Recurring Audit Process

A blue-tinted, long-exposure photograph of a city street at night. Tall buildings with lit windows line the street, and light trails from cars are visible on the wet pavement. The text "Recurring Audit Process" is overlaid in white.



# Recurring content audits and optimization

As part of the Editorial Director's responsibilities, recurring audits of the intranet content should occur. This would entail the following:

- On a quarterly basis, the Editorial Director will meet with the OpCo managing editors or department leads and facilitate a review of existing content on the intranet
- As part of these meetings, together they will determine the relevance of the existing content
- Together, they will also determine whether key updates will be needed
- They will also identify key areas of evolution around the taxonomy and tagging strategy
- Finally, they will identify key areas for platform growth or evolution, which can then be escalated to the Product Manager

# Example audit schedule

| Q1          |            |            | Q2          |            |            | Q3          |            |            | Q4                          |          |          |
|-------------|------------|------------|-------------|------------|------------|-------------|------------|------------|-----------------------------|----------|----------|
| January     | Febuary    | March      | April       | May        | June       | July        | August     | September  | October                     | November | December |
| OpCo Audit  |            |            | OpCo Audit  |            |            | OpCo Audit  |            |            | Exelon Connect Annual Audit |          |          |
| HR/IT Audit |            |            | HR/IT Audit |            |            | HR/IT Audit |            |            |                             |          |          |
| OpCo Audit  |            |            | OpCo Audit  |            |            | OpCo Audit  |            |            |                             |          |          |
|             | OpCo Audit |            |             | OpCo Audit |            |             | OpCo Audit |            |                             |          |          |
|             | OpCo Audit |            |             | OpCo Audit |            |             | OpCo Audit |            |                             |          |          |
|             | OpCo Audit |            |             | OpCo Audit |            |             | OpCo Audit |            |                             |          |          |
|             |            | OpCo Audit |             |            | OpCo Audit |             |            | OpCo Audit |                             |          |          |
|             |            | OpCo Audit |             |            | OpCo Audit |             |            | OpCo Audit |                             |          |          |
|             |            | OpCo Audit |             |            | OpCo Audit |             |            | OpCo Audit |                             |          |          |
|             |            | ERG Audit  |             |            | ERG Audit  |             |            | ERG Audit  |                             |          |          |

# Go Forth and Govern