

Web Content and Usage Analysis Project

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Content

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1. PROCESS FOLLOWED

I was part of the original team and put together the first proposal for the Web Content and Usage Analysis project (WC&UA). I then left the CGIAR and returned nearly a year later about 7 months before the launch.

There are three very distinct components/projects in WC&UA:

Content project – coordination of the selection and presentation/architecture of the content on CGX.

- A survey on information needs was undertaken by ICARDA.
- I took these results to the C4D team at the 2005 workshop.
- At the workshop, the team decided to use the results of this survey as the initial content to be placed on CGX. Some further prioritization of this list of content was identified as important on the grounds of:
 - selecting the content items that would be “big winners” which was particularly important for the launch of CGX as a new product;
 - selecting content that has the highest probability of being able to be achieved in the time frame; and
- having a range of content that caters to different groups (eg scientists, managers, corporate services etc) was considered important for the launch of CGX. I spent a lot of time at the beginning trying to establish the concept/vision of CGX which was not clear. This was important to understand for directing both the content and how CGX was to be marketed. This is detailed further in this paper.
- I initially tried to use a consultant to collect and set up the content. The brief, many discussions and contract were prepared and then the consultant had to pull out because he took on a full time job.
- Time was then very short and I organized one person (Pierre Marchand) from IWMI to collect half the information content and I would coordinate the collection of the other half of the information content. Some content was already delegated to specific teams, i.e.: the CG-wide library, training, and collaboration tools all had their own content and development teams.
 - I used staff or temporary help for some more detailed collection tasks.
- For input and checking of some ideas, I used relevant communities, eg. IT managers, Marketing Group, web masters, as well as the content advisory team which had been set up previously

- There was a fair amount of input. There could have been more and the main hindrance was that we were racing so much just to meet the launch deadline of AGM 05 that the level of review or discussion that would have added value was not always possible.

Marketing project

This project included:

- branding of CGX (including the naming);
 - pre-launch marketing;
 - the launch; and
 - post launch marketing.
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- I developed and presented the overall marketing proposal/approach to the C4D team at the 2005 workshop for their input and agreement.
 - There were 2 attempts to use consultants for the writing of materials and design of the promotional products. The first consultants were not available and the second consultant was too expensive for the available budget. A lot of time was used to find consultants but eventually a good and cost effective solution was found.
 - I worked mainly with Enrica on specific marketing activities and the consultants undertook the required writing, design and organizing of merchandise.
 - For the branding, particularly the name, I worked with the C4D team and involved the Marketing Group for their ideas, and some internal people here (Dario and Paul and Enrica).
 - As this was being launched by Enrica at the AGM, as a major ICT-KM output, this required working closely with Enrica

Evaluation project

There are 2 major documents that will be produced for this project:

- a) guidelines for evaluating CGX usage, usability and usefulness; and
- b) options and guidelines for evaluating web-based products.

The first draft of these reports will be distributed to different communities (eg. IT managers, web masters and the marketing group) for comments. These comments will be collated and analysed and sent to the consultants who are producing the documents for any necessary modifications

Document (a) will then be the guide for the CGX team to undertake future evaluations.

Document (b) will be disseminated around the CGIAR. This may be the basis for future work or applications.

- I developed and presented the overall proposal/approach for the Evaluation project to the C4D team at the 2005 workshop, for input and acceptance.
- I considered contracting any willing CGIAR Center staff to undertake the evaluation project, i.e. setting up guidelines to follow and software to use for evaluating web-based products. There was a concern that this may not be seen as an independent analysis.
- As a result I instead I tried to find consultants that would work closely with the staff in the Centers. Again, finding a good consultant took a lot of time. Twice I went through the whole briefing and quoting process only to have consultants pull out for different reasons. I then asked CGNet to quote. Their quote was initially way outside of our budget but they agreed to a large discount to do the work.
- Pierre from IWMI was to act as go-between, between the consultant and Centers/communities. But as CGNet cost more we couldn't afford this.

The evaluation work was finally started but as CGX was not operational it was difficult for CGNet to do any work on the evaluation as the product was not there to evaluate and no one was sure on all the details of the final product. As a result, we ended up having to delay the start of the evaluation work until there was a product for CGNet to work with. As this product was only coming on line days before the launch this also meant that it was not possible to do any evaluation at the product development stage

2. LESSONS LEARNT & GENERAL COMMENTS

- A lot was achieved in the 7 months leading up to the launch. This was due to a number of factors including: long hours worked; the wide variety of help from across the CG; having budget to bring in help as needed; having a deadline of the launch that was very visible CG-wide.
- More understanding of the capabilities and restrictions of Plumtree were needed so that the best decisions could be made. Understanding Plumtree features and how this affects the content, navigation set up, search abilities etc., was needed. This was not clear as everyone was learning as we went. Therefore there were problems with the content as the knowledge and direction on the technical side was not there. Learning the technology at the same time as the content was being developed when there was a very strict time deadline, lead to decisions that were the best that could be made given the information/knowledge but were not in reality always the best decisions.

This could have been solved through different ways – eg. more time, more emphasis on training early on and to a high level of capability, and/or more use of Plumtree consultants.

There needed to be better links between all content teams: Library, Training, Projects, Applications, and Other information content. This takes a lot of time but would have been worthwhile.

- The way the project was set up, the Content project was only responsible for the ‘other content’ that was not already being looked after by the other content teams and the content project was told to leave these to the other content teams as they were well established . This could have worked if there were overall coordination but there wasn’t. To clarify this, there was overall coordination from an administrative project management angle but not from the angle of the concept and product development. These links and coordination are still important for the future.
- More solutions need to be developed on how Center staff involved in system projects can deal with not getting their own Center’s work done when there is significant time being dedicated to system projects. This is also going to be important for the future CGX work and other ICT-KM projects.

It is noted that this experience strongly indicated the need for significant time to find consultants or internal teams to work on projects. Examples written in the process I followed show how often I had to start from scratch again because the first selection of consultants ended up not being able to be used and the process had to be started again. Preparing written briefings, undertaking verbal briefs and drawing up work plans and contracts is a very time consuming process and often had to be done 2 or 3 times before a final solution was in place. This is time often not accounted for and yet is critical, not just because it does take a lot of time, but because getting this right can significantly affect the outputs and success of the project.

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4. FUTURE MANAGEMENT AND DEVELOPMENT

A. THE OVERALL PARTICIPATORY APPROACH: SHOULD BE RECOGNIZED, COMMENDED AND CONTINUED

I strongly agree with the approach Enrica has pursued in undertaking this project. It parallels what our scientists use when undertaking their research projects, i.e. to work hand-in-hand with the people who will implement and use the final product. This does mean it takes more time, is more complex and more difficult to get agreement and to get work done, much more difficult in quality control, etc. But at the end you are more likely to get uptake and understanding about the product; it becomes easier to market the product and find ambassadors, etc. Ultimately it significantly increases the chances of success.

I have never seen this approach being undertaken to this degree within the CGIAR on any of our own initiatives. I believe this is a 'first' and has taken a lot of commitment from Enrica and the teams of Center staff who put in the effort to make this work. It was a painful process as it takes more effort, involves bringing together people from different disciplines who had different ways of thinking, and trying to come to common understanding and to be able to move ahead and create something that really would mean thinking outside of the box and doing business differently. This was by no means a smooth process, nor could it ever be if done as a genuine participatory approach.

There are also many other advantages to this model, other than the success of a new product, that I felt were achieved eg:

- we built professional relationships across centers and disciplines and communities;
- the multidisciplinary teams made for a more enriched end product; and
- internal capacity was built in skills and knowledge.

These advantages are long lasting and the building blocks of further development and change in the CGIAR.

B. STRATEGIC CONCEPT OF CGX: SHOULD BE CLARIFIED

The concept of what was being developed needed clarifying and took lots of my time because it wasn't clarified.

More work is needed on what the strategic concept is for CGX and how Centers use and link to or integrate with CGX. This needs to be conceptualized from the point of view if Centers do adopt Plumtree and if they do not adopt Plumtree for their intra/internet.

- What is the short, medium and long term 'concept' of CGX?

- What is the concept for how CGX will be used or set up for partners?
- What is this concept from the users' perspective?
- How do we package this and what are we selling?
- What are the key selling points and what are the specific elements that are to be promoted?
- Given a clearer definition of the concept, it should then be finalized what the 'look' and architectural layout should be to reflect this.
- Future Harvest Alliance has asked how they can best become more active participants. This is an excellent opportunity that should not be lost.

C. HOW THE DIFFERENT ELEMENTS OF THE PROJECT WORK TOGETHER

- **PROJECT STRUCTURE:** The content and marketing are subcomponents of the technical project (VRCI) and were technically driven. This should not be the case.

One option could have been to have an overall project manager -but this needed to be someone who can bridge between the technical and the content/marketing elements. This should not be someone who just manages the administrative or operational elements. Or it could have been a joint work between the technical and the content/marketing elements. Whatever solution is selected, the managers need to have significant time available to commit.

D. PROJECT LEADERSHIP AND MANAGEMENT

- **OVERALL MANAGEMENT:** This is more than just project management as it also includes driving of the vision and concept and management of the product development. This is urgently needed that goes across all the areas, technical and content and marketing etc. Particularly what is needed is the link between the 'content and marketing' and the 'technical development'. These 2 areas are too disconnected and being technology driven. This can be linked and driven through overall project coordination or through closer joint management.

I strongly believe that this has been the biggest problem in the first stage of the development of CGX. It has resulted in many problems like the lack of clarity of the concept, content areas not being developed so the appropriate links exist, the whole project being technology driven, etc.

I can see this continuing to be a problem. For example, at the latest workshop, all the CG participants were technology based (eg. IT or web managers) except myself and one other person. CG input to the writing up of ideas for the future

management of CGX has been undertaken by technology specialists.

It is suggested that the overall management and quality control be done in house which has the incentives to produce, meet deadlines and achieve high standards.

E. CONTENT ISSUES

- **CONTENT AUTOMATION:** Further development of content being updated automatically. This was done where possible and when time allowed for the AGM. Each of the content components needs to be reviewed again to see what can still be automated.
- **CONTENT MANAGEMENT:** updating and management of content is needed. This needs to be developed for each content item. This is important as old and low quality content can significantly damage the reputation.
- **OVERALL PRIORITIES FOR CONTENT DEVELOPMENT**

Priorities for content development urgently need to be set. This needs to take into consideration the strategic concept and selling points.

1) Determine what is needed to be able to launch at Centers:
EG.

- Outlook integrated
- Single sign on
- speed and usability
- media section sorted
- policies database

2) Determine what is needed to the end of March 2006.

3) Identify other key content priorities. For example, the projects database was originally the highest priority for content because it was useful, helped scientists and was a political winner.

Text in red is priority.

USABILITY

Overall the usability is not always clear. Until now the focus has been to develop the content and get it up. Now a significant focus needs to be on the usability. Before going into any technical process for this, a large proportion of the usability can be sorted by just

going through the sections with common sense applied. (This couldn't be done earlier as we were still getting the basic content together).

This initial more obvious fixing of the usability should include reviewing menu headings and sub headings, text used, layout, colours used, etc.

- An English check and edit of all current content is needed
- Check on clarity of text (way it is written/introduction/explanations etc) of all current content for the sake of understanding and usability.
- Reassess navigation of menu and sub menu to check logic in the grouping and ordering of content. Take into account also likely future content.

This usability can then be fully assessed as part of the Evaluation Project.

CONTENT

FEATURES

It is unclear what features are in place now and what is planned for the future (and when) eg. low band width and languages options. This hinders the promotional work and must be clarified.

- **SEARCH:** the search feature spans all the CGIAR-related websites and all sections of the intranet sites that Centers and communities are willing to share.
- **LANGUAGE:** There are more than 20 different languages that you can choose from that with one click you can select to put (which?) information into this language. Where is the icon to do this?
- **PERSONALISE YOUR VIEW:** You can change, add or remove features to suit your own needs. Where is this done?
- **LOW BANDWIDTH VERSION:** If you have low band width you can switch to the text only version to make it easier to access the CGX information. (Is this operational? Where is the icon to do this?)

SEARCH

- This should be searching all the CG related web sites. Confirm if this has been set up and let the user know that this is what is being searched on.
- The concept was that all the Centers and communities would also share information from their intranets that is not confidential and is relevant. IPGRI

and Future Harvest Alliance agreed to do this and organized which information was to be shared. I do not know if this is being implemented on CGX.

If this is implemented we need to work with these 2 organizations to set up a process for how new information that goes on there is filtered to also then be shared on CGX when relevant. This was organized with the organizations but needs to be followed up for quite a while to see how this works and to make sure it happens.

- There were supposed to be advanced search capabilities but these don't seem to exist. This means since the search is meant to cover a lot of web sites the results can be very long and the user can't select which web sites they want to search.
- How the results are categorized should be developed/set up.

NEWS TICKERS: Experiment with better usability and effective tickers.

CG INSIDE NEWS

- When you go to the main page of CG Inside News, consider not having a ticker. All the news items could be listed and you have the option to use a scroll bar to move down them.
- Fiona Douglas said that the CG Newsbank on the CG site is set up to make it easy for Centers to upload stories. We should see how this and CGX can work together.

WORLD AGRI NEWS

Needs experimentation with key words. This is currently being done.

NEWSLETTERS

MEDIA

(Note: IITA doesn't need 2 lines; Agroforestry Center – not released or something missing)

IPGRI INTRANET

- but now this doesn't show up for IPGRI staff. This was a key strategic concept and so needs to be discussed how the IPGRI intranet can be accessed through CGX.

LOCATE US MAP

- Difficult to even know what sites are there to look at.
- Difficult to use and understand how to use it.
- **Very awkward map. I recommend replacing it with another and reassess the layout and how content is shown.**

- Need to plan for collecting more location information.
- Strategize how this information can be linked to other information on CGX or searched for through the CGX search.

CALENDAR OF EVENTS

- Calendar to be searchable across themes
- Calendar to be visible across themes (ie a filter applied)
- **How can centers use this to have a filter for their own centers events and only visible to their center? If this could be worked out it is something that can easily be adopted and used by centers because most have this need.**

IARC

- There can be an information section on this and a link to their web site in CG related websites section
- Maria is interested in integrating the web sites more and also developing the IARC site so people can access their own information.

CGVLIBRARY

- Only 8 libraries are connected. What is the time frame for getting the others on board so we know this before we promote the CGV and CGX especially to the Centers who aren't yet connected?
- It is by luck that I know this above information about CGV. There needs to be more formal links including communication links between CGX and CGV. The situation is the same? for On-Line Learning resources and CGX. But someone also needs to have the time to keep these links alive.
- It is said that CGV runs very slowly when accessed through CGX so the Project Coordinator promotes for people to go directly to it and not through CGX. CGX is losing a major promotional opportunity as a result and so this problem should be solved if at all possible and then CGV promoted through CGX.

JOBS

- It doesn't look like all the Centers' job vacancies are there.

RESEARCH PROJECTS

This was the highest priority information content but didn't get set up in time for the launch. This should be given priority still as it is important for scientists and politically.

This could be reviewed also in line with MTPs. If this (or possibly something a little different) could be organized with the team working on the SSA MTP this can be a big winner. I strongly recommend an information specialist be deployed by the ICT-KM Program to work with the SSA MTP team and the Science Council to give advice and organize the collection of the data so that it can usefully be put into a database. This

person should not be a database specialist but an information management specialist and able to work with and preferably influence the high level people.

CREDIT

- add credits to the top of each page (when relevant)

OTHER CGX ELEMENTS

ACCESS

- **FHA (Kerrie and Geoff Hawtin), The Trust (Kerrie) and the Science Council would like access to CGX.**
- **What about other people in similar positions.**
- **Need to develop short and longer-term policies and procedures for non CG but related people having access to CGX. This needs sorting out quickly and then a system set up to reply accordingly and promptly. If not, this can damage the reputation of CGX and the ICT-KM Program.**

SECURITY

This is a commonly asked question. Key elements of the answer have been:

- The team reviewed this
- CG is setting up an enterprise security plan
- Extranet component will not be opened until further security checks
- The language here? password protected using the active directory
- Each community has control on who has access to their community

This should be clarified / updated and central access to this information given. This could even be provided in any more detailed brochure/document.

F. EVALUATION PROJECT NEXT STEPS

This has been reinitiated now that CGX is launched and many technical issues solved. The process to be followed was stated earlier in this document.

G. MARKETING PROJECT NEXT STEPS

MARKETING: SHOULD CONTINUE WHEN THE PRODUCT IS READY

I have not pushed the roll out of the marketing because:

- the concept is still not clear. I ended up commonly using the term, 'CGX is not just another information site' but exactly what it is needs to be clarified.
- some of what I believed were the key features that made CGX more than just an information site were not working and as these were the core of what made CGX different then these needed to be operational before any major marketing and roll out to the Centers.

Consistency in the branding and the way CGX is sold is critical.

Promotional Tools

- Brochure needs updating once the concept is clarified. I suggested that there are 2 'brochures':
 - a short brochure - eg. opening bookmark that is aimed at the end user being able to quickly review what content/features are available for them.
 - a longer brochure that expands slightly on each section.This base information is necessary to be able to go ahead with any more marketing tools/activities, eg:
- Video/wizards on CGX
- Videos on Centers'/communities' intranet sites
- Powerpoint presentation
- Articles in CG related newsletters – eg. ICT-KM, CG News, Center's internal newsletters.
- Flyers/mini posters needed to Center's notice boards.
- Merchandise needed that can list the main content – eg. book mark

Develop ambassadors for CGX

These people should clearly understand the concept and the main product content.

A standard script and FAQ should be prepared for the ambassadors. The script should also include a powerpoint and video presentation.

The ambassadors should also have full access to the promotional tools.

Keep original contributors as ambassadors as well as developing new ambassadors.

Have ambassadors from different disciplines and levels.

Thank and recognize all contributors (and send merchandise to them).

Promotional activities

Promote to different target audiences eg:

- Communities
- Centers
- Key political players

The marketing needs to include a major training component. CGX and its content are far too complex to be able to be marketed with just promotional tools/activities. The training could be done at different levels - eg:

- Identify key political players and give them personal training and set it all up for them.
- Identify some potential big users of some content, eg. a challenge program using some particular collaboration tools and work directly with them in setting this up and how to use it.
- Give some training to key people in each Centers, eg. the Information heads, librarians, IT managers etc.
- Provide simple training materials for key people to use on others.
- Offer a number of on line training (eg. webinars) to all CG staff.

There is a need though to sort out concept and content first (and soon before the momentum is lost).

4. ADVANTAGES OF BEING INVOLVED IN CGX DEVELOPMENT

What can a center like IPGRI get out of being so closely involved with CGX?

Advantages to IPGRI were:

- Understand some features and uses of Plumtree.
- Understand how to use CGX and find information (navigate CGX)
- There was stronger internal commitment to achieve having a Vlibrary operational at IPGRI to feed into the CGX Vlibrary.
- Increased networking and stronger relationships developed with colleagues in other Centers and FAO.
- Being part of and having insight into changes that have a high chance of becoming system standards.

Advantages to the System/ ICT-KM program (as well as to IPGRI):

- This has led to early commitment to using Plumtree at IPGRI for the intranet and the web site.
- Involvement and more understanding of system level developments and advantages led to IPGRI committing to the ICT-KM supported 'project manager' software.
- IPGRI has the understanding of information to put on or link to CGX content.
- People involved in CGX have become ambassadors to system approaches to doing business.
- I have also heard senior team members say how they had been in their job a long time and CGX gave them the opportunity to grow and develop their career without having to resign and find a new job.

It needs to be reviewed how the other Centers that weren't as closely involved can get these advantages/benefits.