

## The Extranet Checklist v1.5

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This checklist is adapted from "Benchmarks for Extranets and Online Communities," written by Jillaine Smith ([jillainedc@yahoo.com](mailto:jillainedc@yahoo.com)) for the Benton Foundation. The original 20-page document may be downloaded from [http://www.benton.org/publibrary/capacity/extranet\\_benchmarks.doc](http://www.benton.org/publibrary/capacity/extranet_benchmarks.doc).

Considering an extranet or "online community"? Here's a checklist to gauge your organization's readiness and willingness to do what it takes for such an effort to be successful. Answers to these questions not only help you keep the project grounded in your overall programmatic goals and objectives, but they can significantly influence the design, maintenance, usage guidelines and outreach activities of the extranet itself. Perhaps even your decision whether or not to build an extranet.

Significant attention is paid to the *process* of planning, designing and working in partnership with the extranet designer or builder (which could even be your internal technology staff). Why so much emphasis on process and partnership? Because this checklist is built upon the experience of many who learned the hard way that without planning as well as clear expectations and roles from the beginning, the benefits of an extranet may never come into existence.

The first section of this checklist is focused on items that, ideally, you address *before you sign a contract with a vendor*—indeed, before you make your final decision about moving forward at all. But if you've already made that decision, signed the contract, or even written the first check, the following checklist can still help you get onto a track that can lead you to success.

<p><b>Purpose</b>                  Many organizations jump into building an online community without identifying what they hope to accomplish with it. They are so eager to get something up and running (and often are being pressured by other forces within their organization) that they are hesitant to spend too much time on the planning required to ensure that the best, most appropriate and useful solution is designed and implemented. But an unplanned extranet often results in a worthless extranet...</p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> We have a clear understanding of how the extranet support the goals and objectives of our organization.</li> <li><input type="checkbox"/> We have identified outcomes and benefits that the intended audience will experience as a result of their use of the extranet.</li> <li><input type="checkbox"/> We know how the extranet will improve upon or support existing online or other resources and approaches that we might use to build community.</li> </ul>
<p><b>The Intended Audience</b>                  While you want to create this extranet to advance your organization's goals and objectives, the bulk of the extranet <i>must</i> serve the needs of its intended audience or it will not fly. <i>It simply won't.</i> If the definition of your intended audience is too broad, and your understanding of their needs insufficient, you will likely end up with a very quiet and empty "online community." For example, being grantees of a particular foundation does not a community make. It is imperative that you understand the perceived value of an extranet to your intended audience.</p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> We have identified an appropriate, targeted audience for the online community.</li> <li><input type="checkbox"/> The intended audience, as a group, already considers itself a community, or its members are already communicating with each other through other means.</li> <li><input type="checkbox"/> The extranet will be technically accessible by the intended audience. (For example, if the majority of intended users are using dial-up modems to access the Internet, the extranet should not have as a primary feature streaming video training sessions.)</li> </ul>
<p><b>Audience Input</b>                  Members of the intended audience should be tapped for their input about using an online community, including what topics might be of interest to them, and what will be of enough value to them that they will take the time to learn and use the extranet. Does this audience have access to the necessary equipment and software to participate? For example, even if all members of the intended audience have Internet access and use email regularly, that does not mean that they are automatically going to incorporate coming to a Web-based extranet into their daily activities.</p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Input—through online surveys, focus groups or interviews—has been sought from the intended audience about their interests in and concerns about an extranet.</li> <li><input type="checkbox"/> Design of the extranet reflects and accommodates current modes of behavior and activities of the intended audiences.</li> <li><input type="checkbox"/> An implementation plan is created that reflects design solutions to meet needs and interests identified through any input methods.</li> </ul>
<p><b>Institutionalization</b>                  Much attention is given to the <i>technological</i> design and creation of the extranet. However, even the most technologically sophisticated extranet will not make an online community. Without the commitment—either in staff time or dollars—to providing the "humanware" components of an extranet, your extranet is likely to fail. In fact, I'll go so far as to <i>assure</i> you that it <i>will indeed</i> fail.</p> <p>Many organizations assume that the vendor who designed, built and hosts the extranet will also "manage" it. But that's like expecting the architect or technical help of a convention center to design the conference program and arrange for speakers. Conference organizers call upon such expertise to hook up the appropriate technology so invited speakers will be physically heard, but they are not asked to design a session or moderate a panel of experts.</p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> We have full leadership buy-in of and commitment to the extranet.</li> <li><input type="checkbox"/> We have examined and modified our existing organizational practices to support the goals of the extranet.</li> <li><input type="checkbox"/> We have committed staff time to promote the extranet to its intended audience.</li> <li><input type="checkbox"/> We will recruit external support as needed to supplement staff resources.</li> <li><input type="checkbox"/> Outreach is coordinated with and integrated into existing outreach or communications efforts going on in our organization.</li> <li><input type="checkbox"/> Specific outreach and follow-up expectations are developed, including responding to needs of extranet participants in a timely manner.</li> <li><input type="checkbox"/> Print and online outreach materials have been created, tested and disseminated.</li> </ul>

<p><b>“Care and Feeding” Roles</b>                  After institutionalization, overlooking the key role of the human facilitator is perhaps the next greatest reason that online communities fail to meet the expectations of their creators. An extranet facilitator or moderator is responsible for such activities as welcoming newcomers, encouraging silent participants (“lurkers”) to speak up, seeding the conversation when necessary and connecting participants with the resources that will keep them coming back for more.</p> <p>More important than technology skills, the moderator/facilitator should have the <i>people</i> skills required to coach participants into active and appropriate engagement. Ideally this person is housed at the organization that originated the extranet, familiar with both the needs of the intended audience and the goals of the organization.</p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> We have identified and support an extranet manager / facilitator.</li> <li><input type="checkbox"/> We have built in staff time to help participants make the best use of the system and to answer any questions they may have about the use of the extranet.</li> <li><input type="checkbox"/> We have a proactive extranet manager who <i>regularly</i> compiles and disseminates news and other resources relevant to the interests of the online community.</li> </ul>
<p><b>Content... content... content...</b>                  An extranet will only be used if such use brings value to the intended audience. Experienced online community builders reiterate the importance of drawing intended audiences to the extranet with content or tools needed to make their days more effective. These content needs will have been identified through target audience input early in the planning phase.</p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Valuable and timely content—especially that not easily found elsewhere—is “pushed” to extranet users to keep them engaged.</li> <li><input type="checkbox"/> The extranet provides access to resources from the field that are relevant to our intended audience. (E.g., how-to’s, vendor recommendations.)</li> </ul>
<p><b>Training and support</b>                  The project examines the relationship of training and usage. Users who are trained are more likely to be active participants in the extranet.</p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> We handle requests for technical assistance in a timely, friendly manner.</li> <li><input type="checkbox"/> We provide hands-on learning focused on incorporating the extranet into the daily operations of our target audience.</li> </ul>
<p><b>Measuring impact</b>                  In order to sustain an extranet, it is essential to assess how the initiative is meeting the needs not only of its intended audience but meeting your objectives as well. How might the project need adjusting in order to sustain the effort into the future.</p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> We have selected as initial participants those people most likely to experience direct and timely benefits from the extranet and who are positioned to communicate those benefits to others.</li> <li><input type="checkbox"/> We will evaluate an initial pilot period with input from all stakeholders through online surveys, email solicitations and interviews.</li> </ul>

**A note about measurement...**

Both the vendor and the organization requesting the extranet need to be very clear with each other *before the design is completed* about what is needed and possible in terms of measuring the activity of the extranet once it is in place. Most vendors of web-based tools include standard usage statistics, but such statistics may not capture information required to understand the success of the extranet. What information does your organization need to capture in order to assess the value of the initiative? This will likely require some customized programming on the part of the extranet vendor. Expect to pay at least an extra \$20,000 for such customization. Although extranet vendors will make themselves more marketable by building such assessment tools into their standard extranet offerings.

**And now onto partnership and process...**

If and only if you have checked off a significant number of the boxes in the above section should you actually decide to move forward with your extranet. But that doesn't mean you've done everything you can to make your extranet a success. While the extranet's ultimate value will be found in its usefulness to the intended audience and its support of your organization's goals, a successful extranet also requires clear expectations and communications between the parties who are requesting, designing and building it. If you are using a third-party web or extranet design firm, this is the relationship between you and the vendor. Or your "vendor" may be the technology staff within your organization if you are building the extranet internally. In either case, even the best-planned extranet may never get off the design table without good, strong *process*.

<p><b>Partnership Roles &amp; Expectations</b>                  Roles and deliverables of all key personnel are clearly understood, delineated and documented, including: project governance, management and marketing. <i>Assume Nothing</i>. State all expectations from the outset. For example, the client may assume that if the vendor builds a good enough tool, it will be used, but the vendor may assume that the client will adequately staff the project. Similarly, are the costs of using third-party services (such as news feeds) included in the budget? From which line item? Get all assumptions out on the table and shared. Even if roles and expectations are defined early on, they continue to need reflection and refinement over the course of the initiative.</p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> All parties understand who the ultimate client is, who has the final "buck-stops-here" decision-making authority.</li> <li><input type="checkbox"/> We have identified an overall "project manager" who is the liaison among all parties and who tracks the progress of the <i>entire</i> initiative (and that person knows their role).</li> <li><input type="checkbox"/> This project manager maintains a check list of who is doing what and by when.</li> <li><input type="checkbox"/> <i>All</i> project-related costs are clearly defined; it's understood who pays for what, and what is and is not covered by the budget.</li> <li><input type="checkbox"/> Each organization is clear about how each will be represented in online and print.</li> </ul>
<p><b>Communications</b>                  What communications devices (phone, email, fax, Intranet) will each organization use to communicate internally? Assess the technological strengths and limitations of each partnering organization. Maintain a balance between personal interactions and electronic communications. Choose the most appropriate methods of communications suited to the resources and habits of each organization. And if one method isn't delivering the results you seek, try another! Remember that the goal is successful communications.</p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> One primary liaison from each partner organization is identified and contact information shared.</li> <li><input type="checkbox"/> All meetings have clear agendas and goals, conveyed in advance.</li> <li><input type="checkbox"/> Agreements reached and action items are documented and shared in a timely manner.</li> <li><input type="checkbox"/> Organizational decision-making processes of each partner are clearly understood and reflected in the work plan and timeline.</li> <li><input type="checkbox"/> External demands are identified and shared, especially if they may affect the timeline (e.g., board meetings, travel, vacations).</li> </ul>
<p><b>Policies &amp; Legal Issues</b>                  Partnerships can be too easily harmed and the entire project threatened if policies and legal issues concerning the extranet are insufficiently addressed. Ownership of content, privacy of posted information, use of the extranet for purposes outside the mission of or that might threaten the sponsoring organization (lobbying or electioneering) are just some of the legal issues that must be identified, and legal advice about them sought. Any ramifications should then be incorporated into both the project work plan, the contract and extranet usage guidelines and policies.</p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> All parties clearly state legal concerns as early as possible.</li> <li><input type="checkbox"/> Ownership of content and licensing of software code is determined.</li> <li><input type="checkbox"/> Copyright issues around site content developed by third parties are addressed.</li> <li><input type="checkbox"/> Editorial control is addressed</li> <li><input type="checkbox"/> A usage policy is in place.</li> <li><input type="checkbox"/> Legal advice is sought to approve policies.</li> <li><input type="checkbox"/> All legal notifications are appropriately addressed in the online environment, easy to find, in understandable language.</li> <li><input type="checkbox"/> A written contract—that includes documentation expectations, legal issues and deliverables—is sufficient, signed and exchanged.</li> </ul>

## Resources for Further Exploration

The lessons reflected in this checklist were informed by a number of resources in the field, including...

**[Benchmarks for Extranets and Online Communities](#)** (MS Word)  
([www.benton.org/publibrary/capacity/extranet\\_benchmarks.doc](http://www.benton.org/publibrary/capacity/extranet_benchmarks.doc))  
Guidelines to help organizations plan, build and sustain online communities.

**[Building Online Communities, Transforming Assumptions into Success](#)**  
([www.benton.org/publibrary/practice/community/assumptions.html](http://www.benton.org/publibrary/practice/community/assumptions.html))  
What an online community can *and can't* do for your organization.

**[Resources for Facilitators and Moderators of Online Discussion](#)**  
([www.emoderators.com/moderators.shtml](http://www.emoderators.com/moderators.shtml))  
An annotated list of articles and other materials to help you set up, maintain, and have a successful experience with online dialogue.

**[Online Community Report](#)** ([www.onlinecommunityreport.com](http://www.onlinecommunityreport.com))  
A twice-monthly email newsletter covering on online community building trends.

**[Full Circle Associates](#)** ([www.fullcirc.com/community/communitymanual.htm](http://www.fullcirc.com/community/communitymanual.htm))  
A rich collection of resources about current trends, technical assistance and advice.

***Community Building on the Web: Secret Strategies for Successful Online Communities***, by Amy Jo Kim, Peachpit Press, 2000.  
Introduces nine essential strategies for creating true community online.

**[Partners in Public Service: A Working Guide for Public Broadcasters and Community Organizations](#)** ([www.benton.org/publibrary/partners/pips.pdf](http://www.benton.org/publibrary/partners/pips.pdf))  
The staff involved in eight partnerships between public television stations and museums, libraries and historical societies share their experiences with collaboration in an effort to help pave the path for organizations breaking similar ground.

**[Twelve Steps for Effective Partnerships](#)**  
([www.benton.org/Practice/Features/truepartners.html](http://www.benton.org/Practice/Features/truepartners.html))  
This overview of the Institute of Museum and Library Sciences' (IMLS) *True Needs, True Partners* report discusses essential elements for successful partnerships.

**[Sound Partners for Community Health Toolkit](#)**  
([www.soundpartners.org/topics1983/topics.htm](http://www.soundpartners.org/topics1983/topics.htm))  
Benton's *Sound Partners* Program supports partnerships between public radio stations and local health organizations. The site's toolkit includes checklists, worksheets and partnership assessments.

***Flawless Consulting***, by Peter Block, Josse-Bass/Pfeiffer, second edition, 2000.  
While aimed at helping consultants be more effective with their clients, the strong advice provided throughout can help any client/vendor partnership set clear expectations and handle "relationship" obstacles that may be encountered during especially the early phases of a technology initiative.