# ISCTE ⬡ IUL

# University Institute of Lisbon

Department of Information Science and Technology

# How Employee Portal Contributes for the Intangible Assets Value Creation

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A dissertation presented in partial fulfilment of the requirements for the degree of

Master of Science in Information Systems Management

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ISCTE-IUL

October, 2013

# Acknowledgements

The work presented in this thesis would not have been possible without the support from many people. I take this opportunity to express my sincere gratitude to all those who made this work possible.

I wish to thank to …

my wife, Cristina, and my lovely children, Maria, Francisco, and Leonor for all their love and patience and for giving me the courage to make it, and to you this thesis is dedicated;

my parents for instilling in me the importance of education;

my supervisor Professor Mário Romão for providing guidance, encouragement, thoughtful criticism and for his availability;

my friends for all the motivation.

I also wish to recognize the support and collaboration received from Dalila Ribeiro Martins, Pedro Esteves de Carvalho and Ana Allen Lima from Portugal Telecom.

## Abstract

Today's increasingly business competition and the information technologies development led to huge corporate organisational changes and pulled intangible assets up in the value chain. Employees' skills, talent and know how, intellectual property, information, information systems, infrastructure, culture, teamwork capacity and other forms of non-physical assets are critical sources of value. But in order to generate value they must be integrated with each other and aligned with the objectives for the internal processes.

To address some organisation concerns related to value creation and change management, a theoretical multi-tier framework was developed. This framework illustrates the path and flows of value-creation, the relationships between "intangible assets" and the representation of "enabling changes projects". Strategy Map and Benefits Dependency Network were combined, resulting in a stronger framework to help organizations enhancing their strategy knowledge, to reduce the risk of projects failure, and to capture real value from their investments.

In order to understand how an employee portal contributes for the intangible assets value creation process, an Employee Portal case study was carried out. The author performed a preliminary study comprising a literature review and data collection followed with semi-structured interviews and analysis of employee satisfaction surveys results to triangulate and confirm all the data gathered.

**Keywords**: Change Management, Strategy Map, Benefit Management, Intranet, Employee Portal, Strategic Alignment, Collaboration, Intangible Assets, Organizational Culture

## Resumo

O aumento da competitividade empresarial aliado ao nível de desenvolvimento das tecnologias de informação provocou enormes mudanças organizacionais e aumentou a importância dos ativos intangíveis na cadeia de valor. As competências, talento e o "saber fazer" dos colaboradores, a propriedade intelectual, informação, sistemas de informação, infraestrutura, cultura organizacional, capacidade de trabalho em equipa e outras formas de ativos intangíveis são fontes importantes de valor. Contudo para gerarem valor, estes ativos devem estar integrados entre si e alinhados com os objetivos para os processos internos.

Para endereçar algumas preocupações, da organização, relacionadas com a criação de valor e com a gestão da mudança, desenvolvemos um modelo teórico com estrutura multicamada. Este modelo ilustra os caminhos e os fluxos de criação de valor, as relações entre os "ativos intangíveis" e a representação dos "facilitadores de mudança". Combinámos o Mapa Estratégico e a rede de dependência de benefícios, resultando num modelo mais robusto para ajudar as organizações a melhorar o conhecimento da estratégia, reduzindo o risco de falha de projetos e captando o valor real de seus investimentos.

Por forma a entender a forma como um portal de colaborador contribui para o processo de criação de valor dos ativos intangíveis da empresa, foi realizado um estudo de caso com um portal de colaborador. O autor realizou um estudo preliminar que compreende a revisão da literatura e coleta de dados, seguida por entrevistas semiestruturadas e análise dos resultados de questionários de satisfação de colaboradores para triangulação e confirmação dos dados recolhidos.

**Palavras-chave**: Gestão de Mudança, Mapa estratégico, Gestão de Benefícios, Portal de Colaborador, Alinhamento Estratégico, Colaboração, Ativos Intangíveis, Cultura Organizacional

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## List of Abbreviations

CBA – Cost-Benefit Analysis

ICT – Information and Communication Technology

IS – Information Systems

IT – Information Technology

HR – Human Resources

CIAT – Capital Investment-appraisal Techniques

BM – Benefits Management

BDN – Benefits Dependency Network

# 1   Introduction

## 1.1   Motivation for research

Over the years working as project manager in ICT projects, the author perceived some problems and worries surrounding these projects that are simultaneously of great interest and concern to organizations: (1) the difficulty to understand the real value and benefits of Intranet sites and Employee Portals; (2) justifying ICT investments in these solutions it's not an easy task; (3) being a solution that implies great changes in culture, behaviour and processes it's essential to build adequate change management programs; (4) since the value of these solutions depend greatly on information, it's essential to keep it updated, consistent, and with the proper orientation to profile and user responsibility.

This dissertation is the last item within the Master of Science in Information Systems Management programme at ISCTE-IUL Lisbon University Institute. The interest in the subject woke up in one of the previous courses – Benefits Management and Information System Governance.

The Benefits Management approach is a way of increasing the value generated from IT investments and it took our attention because "benefits realization" is directly linked to "change management".

"Culture is perhaps the most complex and difficult dimension to understand and describe because it encompasses a wider range of behavioural territory than the others" (Kaplan, et al., 2004).

The main motivation for this research came from the experience the author had while involved in several IT projects related with the creation of a new internal brand within Portugal Telecom (Seruya, 2008).

## 1.2   Problem statement

Employee portals are relevant information capital assets that perform an important role in the organization strategy. But justifying investments in these solutions it's not an easy task and their implementation, demands for great changes in culture, behaviour and processes. Therefore it's essential to understand employee portals business value and build adequate change management programs.

It's obvious the importance of using visual representations of strategic intent to understand how organizational resources are used to create value. And "Strategy Maps" clarify the way

intangible assets are aligned with strategy to create value for the organization. However they don't address organization concerns related to change management.

To conveniently address these matters a framework was developed to help understanding the cause-effect relationships that generates business value, as well as providing top management and decision makers the information needed for a suitable top-down commitment and sponsorship, essential to perform appropriate change management and benefits realization.

## 1.3   Objectives

Strategy Map (SM) and Benefits Dependency Network (BDN) were combined, resulting in what can be considered a stronger framework to help organizations to enhance their knowledge of the strategy, to reduce the risk of investments failure or misuse, and a contribution to capture real value from them.

The objective is to apply this framework to an employee portal case study, as a means to understand how a corporate employee portal contributes for the intangible assets value creation process and what are the relevant Innovation and Support processes involved and the required changes to guarantee benefits realization.

## 1.4   Research questions

The main and unique research question is directly related with the difficulties to understand the role performed by the employee portal in the organization strategy: *"How employee portal contributes for the intangible assets value creation?"*

To answer to this type of explanatory questions, case studies, histories and experiments are the preferred researched methods (Yin, 2009).

## 1.5   Research Methodology

### 1.5.1   Research approach

While qualitative researchers seek to understand the context or setting of the participants through visiting this context and gathering information personally, in quantitative studies, researchers advance the relationship among variables and pose this in terms of questions or hypotheses (Creswell, 2008).

Although case study seems to be the best fitted research method to answer the research question, the author decided to follow a pragmatic approach to research, using mixed methods.

Mixed methods research has been defined by Creswell and Plano Clark as "a research design with philosophical assumptions as well as methods of inquiry. As a methodology, it involves philosophical assumptions that guide the direction of the collection and analysis and the mixture of qualitative and quantitative approaches in many phases of the research process. As a method, it focuses on collecting, analyzing, and mixing both quantitative and qualitative data in a single study or series of studies. Its central premise is that the use of quantitative and qualitative approaches, in combination, provides a better understanding of research problems than either approach alone" (Creswell, et al., 2007 p. 5).

One of the advantages of using mixed methods is triangulation. "Triangulation refers to the use of different data collection techniques within one study in order to ensure that the data are telling you what you think they are telling you. For example, qualitative data collected using semi-structured group interviews may be a valuable way of triangulating quantitative data collected by other means such as a questionnaire" (Saunders, et al., 2009 p. 146).

This study considered the use of a variety of data sources subject to validation through data triangulation.

Figure 1: Creswell's explanatory mixed methods designs (Warwick, 2010)
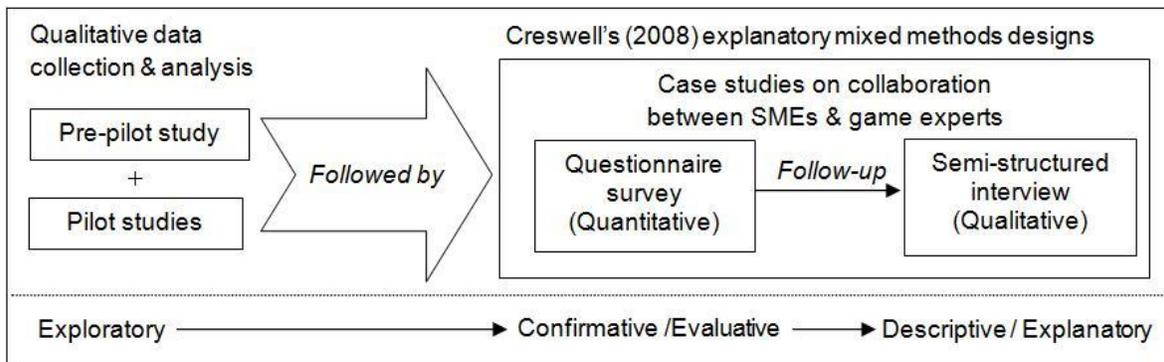


### 1.5.2 Object of study

Portugal Telecom is an international operator focused on three main geographies: Portugal, Brazil and Africa. In addition, PT also has investments in Asia, namely in East Timor and, until 2013, in Macao. PT has more than 100 million customers worldwide and generates 58% of its revenues outside Portugal, including 53% from Brazil.

In the Portuguese market, PT is a customer-oriented company focused on innovation and execution, managing its business along customer segments: (1) Residential: providing a differentiated and sophisticated multi-screen pay-TV experience (having achieved a market

share of 37% in the Portuguese pay-TV market in just over 4 years); (2) Personal: mobile data and convergence as key growth levers, and (3) Enterprise: new ICT services for both corporations and small/medium businesses leveraging PT's unique access networks and next generation data centres.

At an international level, PT is focused on improving the operational performance of its assets and on sharing best practices across the various businesses. The expansion of international operations to multiple geographies is one of the most important catalysts of value creation in the telecommunications sector and PT has built a relevant portfolio of international operations.

The selection of the company was made by convenience.

### 1.5.3   Research design

The methodology used in the research began with a literature review of research/academic papers, books and specialized websites. Literature review was followed by organization data gathering (consisting mainly on internal communication and organizational climate questionnaires) and interviews to selected stakeholders.

Figure 2: Case study research – a linear but iterative process (Yin, 2009)
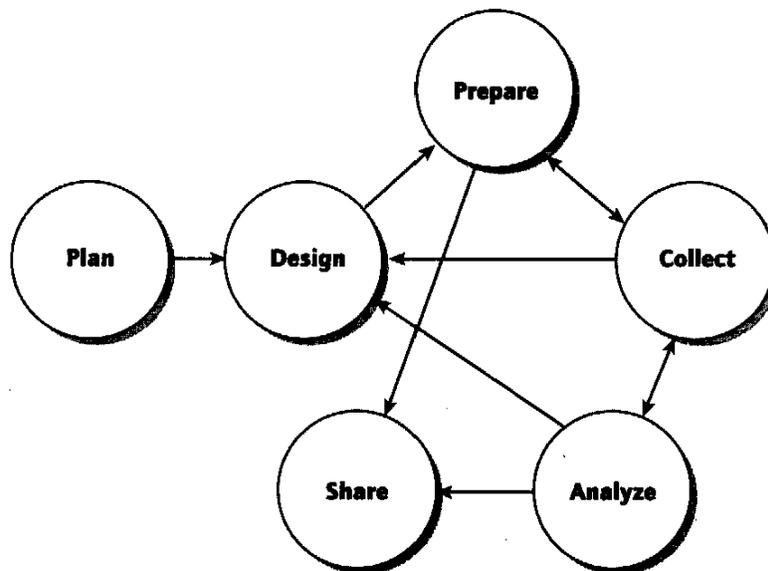


Once this thesis development process is iterative and incremental we used Unified Process framework to illustrate the phases and workload in each main activity performed.

The Unified Process is an iterative and incremental development process, where each iteration results in an incremented version of the thesis that is released. This version is

supposed to offer incremental improvement over the previous one. Most iteration include work in most of the process disciplines with the relative effort and emphasis changing over the course of the project.

Figure 3: Thesis development Unified Process
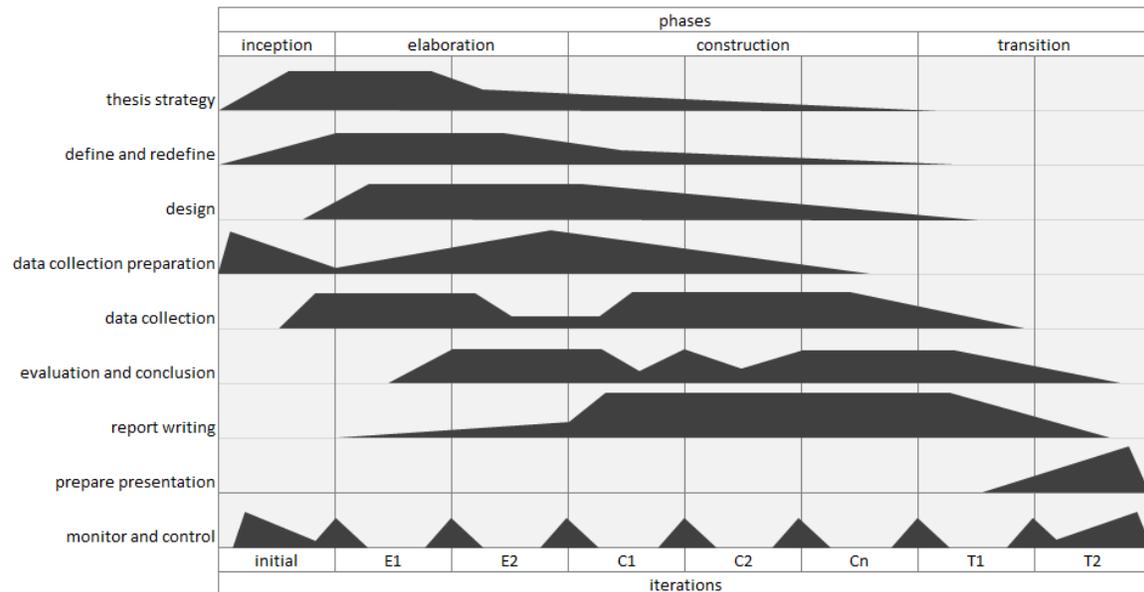


Unified Process phases:

i. In **inception** phase the author established the thesis scope and boundary conditions, prepared a preliminary project schedule and identified major risks.

ii. During the **elaboration** phase, the author organized the main topics and performed preliminary literature review in order to validate the thesis feasibility and mitigate major risks. At this point, scope is refined and project schedule is detailed.

iii. **Construction** is the largest phase and it's when the author performed data collection and thesis development. Each iteration addresses a different partial deliverable and contributes for the overall product.

iv. In **transition** phase the author performed thesis review and refinement and prepared the thesis delivery and presentation.

The author considered nine core process workflows, representing a partitioning of all stakeholders and activities:

i. In **thesis strategy** the author, based on his motivation, established the thesis topic, the object of study, thesis objectives, problem and research questions and according to the type of question selected the adequate research methodology;

ii.    In **define and redefine** activities the author performed literature review and research questions review;

iii.    **Design** activities considered the framework design, case study selection, identification of relevant facts and evidences to collect, sources of information and collection methods;

iv.    In **data collection preparation** activities, the author reviewed data collection techniques, interview structure and identified participants / stakeholders and corporate document sources;

v.    **Collect data** activities considered gathering corporate information and performing interviews;

vi.    **Evaluation** and **Conclusion** activities considered collected data analysis and verification and taking conclusions out of it;

vii.    In **report writing** activities the author finished the thesis report considering the case study report;

viii.    **Monitor and control** activities were dedicated to check and update schedule and to control thesis risk.

Figure 4: Thesis activity diagram
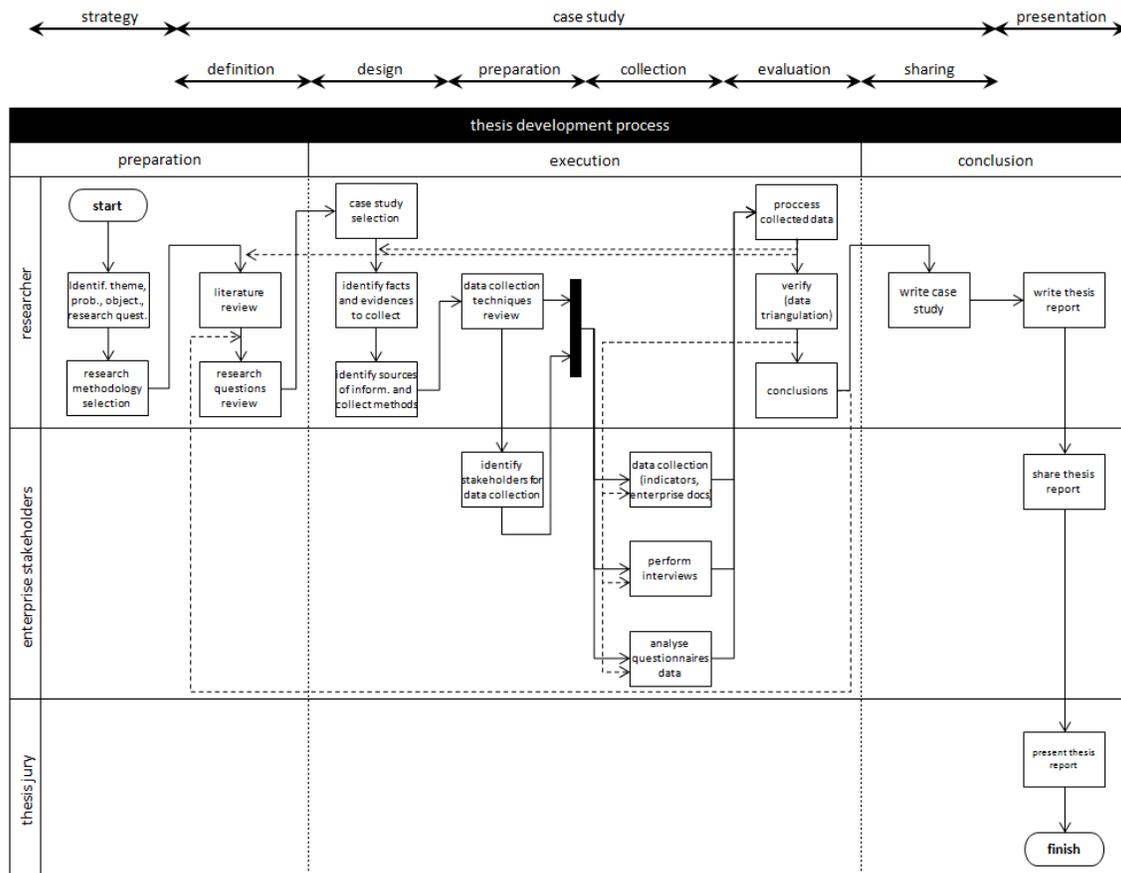
## 2 Literature review

### 2.1 The importance of intangible assets

Today's increasingly business competition and the information technologies development conducted to huge corporate organizational changes and pulled intangible assets up in the chain value.

Intangible assets – skilled workforce, patents and know-how, software, strong customer relationships, brands, unique organizational designs and processes, and the like – generate most of corporate growth and shareholder value (Lev, 2004). In fact these intangible assets may be just as real as other assets in their ability to generate value (Brynjolfsson, et al., 1999).

The significant growth of intangible assets is clear by the change in tangible and intangible asset structure in modern organizations. According to Ocean Tomo, an intellectual property merchant bank, the average market value of a Standard & Poor's 500 company in 1975 consisted only of 17% intangible assets whereas it has grown up to 80% by 2010 (Ocean Tomo, 2011).

Figure 5: Components of Standard & Poor's 500 Market Value (Ocean Tomo, 2011)
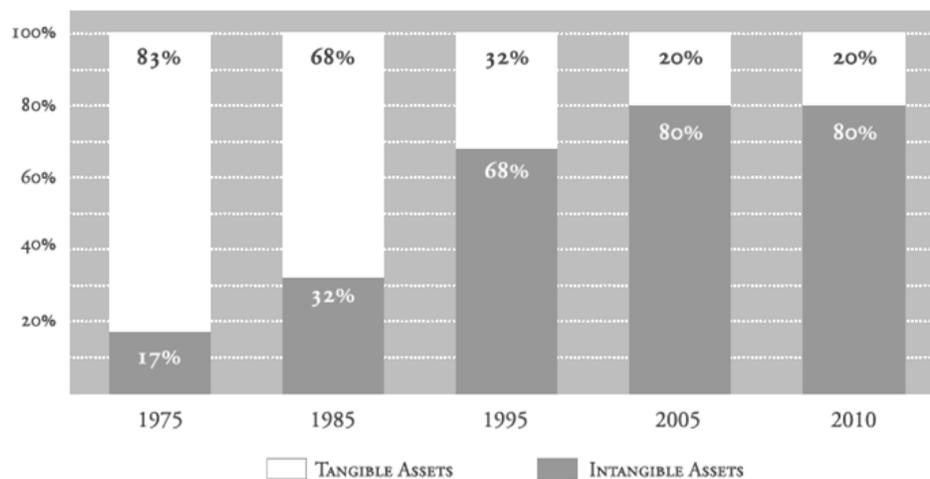


### 2.2 Corporate culture

"Leadership, teamwork and communication are important ingredients in organizational capital. Together, they provide the ability to adapt, and to make the changes required to execute on the strategy" (Armitage, et al., 2006 p. 22).

Marr (2004), following other authors, highlights the relevance of corporate culture and states that it "influences employee competencies and vice versa" (Marr, et al., 2004 p. 317), "reinforces the achievement of the overall goals" (Marr, et al., 2004 p. 315), gives "a common and distinctive method for transmitting and processing information" (Marr, et al., 2004 p. 315), "defines a common way of seeing things, sets the decision-making pattern, and establishes the value system" (Marr, et al., 2004 p. 315), "encourages individuals to operate both as an autonomous entity and as a team in order to achieve the company's objectives" (Marr, et al., 2004 p. 316).

The importance of developing an adequate corporate culture to promote collaboration, sharing knowledge and innovation is consensus among academics and practitioners. In fact Bharadwaj (2000) describes knowledge management as a "social process that requires tremendous organizational change" and he says that creating a culture for knowledge management involves both technological and social aspects like changing the organization structure, control and communication systems and reward structures.

The use of collaboration practices in companies is the starting point to create innovative processes, products or services that differentiate the company from the competition IBM (2008). To make these changes possible, companies must (i) implement a culture of collaboration, trust and share of knowledge and competences; (ii) implement tools to exploit collective knowledge, experience and communities and (iii) create the habit to use those tools (IBM, 2008 and Martinia, et al., 2009).

The development of such skills and abilities are the foundations for the success of Intranet initiatives and they demand both time and investments in communication and education, in order to modify the behaviours and overcome existing "barriers" and "alibi" to the non-use (Martinia, et al., 2009).

## 2.3   Strategy Map, a tool to capture the organization's strategy

"Although intangible assets had become major sources of competitive advantage there were no tools to describe them and the value they create" (Kaplan, et al., 2000 p. 2). The concept of Balanced Scorecards was introduced in 1992 to understand this value creation through the measurement of the organization performance in four perspectives (financial, customer, internal process and learning and growth).

But to capture the organization's strategy in a visual form – to facilitate communication and discussion of the company strategy as it describes how an organization creates value for its shareholders, customers and/or citizens – they developed Strategy Maps (Kaplan, et al., 2004). Strategy maps provides "a visual framework for an organization's strategy – how it intends to create value" (Kaplan, et al., 2004 p. 2) and they clarify all cause-effect

relationships between the same four perspectives of Balanced Scorecard so that an effective strategy can be developed and then optimized over time (Kaplan, et al., 2004).

Kaplan and Norton developed a standard template that "contains four distinct regions – financial, customer, internal processes, and learning and growth – that correspond to the four perspectives of the balanced scorecard. The template provides a common framework and language that can be used to describe any strategy" (Kaplan, et al., 2000 p. 2).

Figure 6: A simplified Strategy Map (Kaplan, et al., 2004)
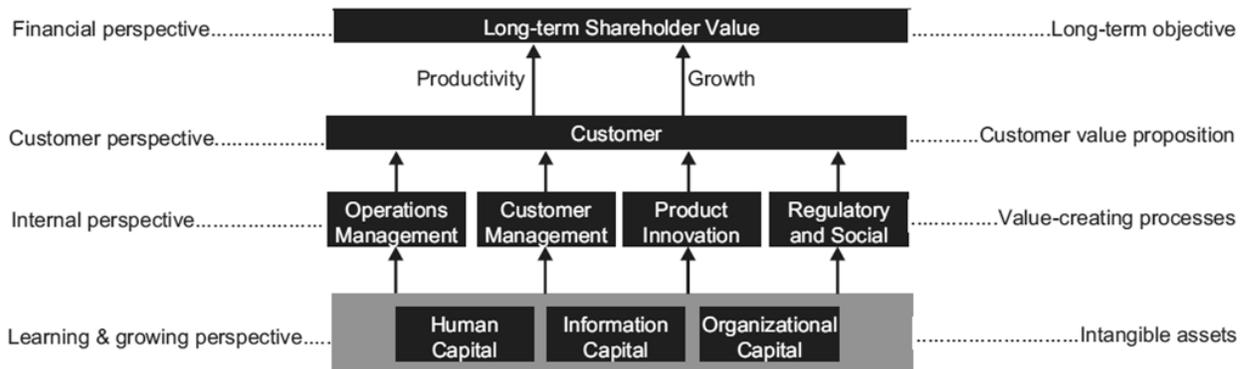


Reading the map "from bottom to top, the template shows how employees need certain knowledge, skills, and systems (learning and growth perspective) to innovate and build the right strategic capabilities and efficiencies (internal process perspective) so that they can deliver specific value to the market (customer perspective), which will lead to higher shareholder value (financial perspective)" (Kaplan, et al., 2000 p. 5).

Armitage, et al. (2006) propose a completed generic strategy map, showing all three types of capital working together to help the company execute the elements of the internal business perspective.

Aligned learning and growth and internal business processes (the "how we plan to accomplish it" part of the map) facilitate achievement of customer and financial strategies (the "what we want to accomplish" part of the map).

Figure 7: Completed Generic Strategy Map (Armitage, et al., 2006)
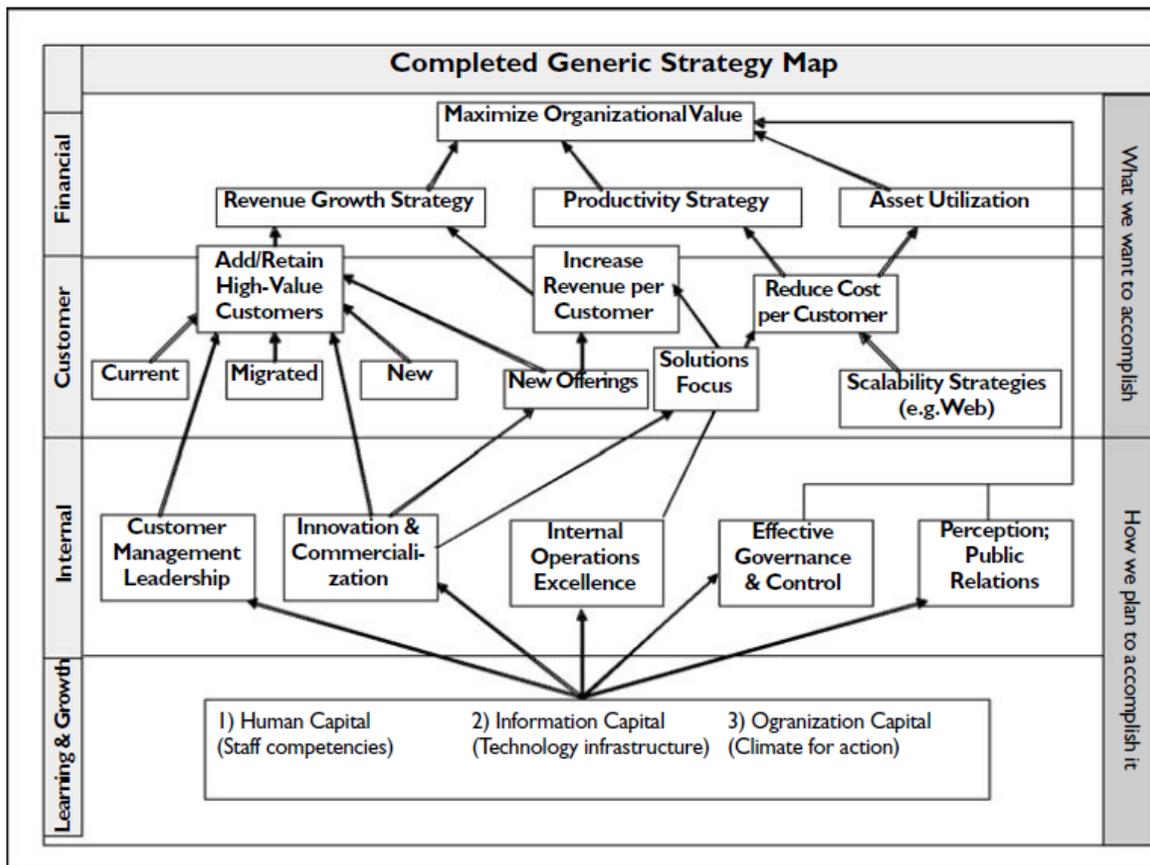


## 2.4 The creation of value from intangible assets

According to Ward and Daniel, "IT, of itself, delivers few benefits. It is the complementary business and organizational changes that produce the majority of benefits" (Ward, et al., 2006 p. 212). Brynjolfsson and Yang, based on empirical evidences, state that up to nine-tenths of the costs and benefits of computer capital are embodied in otherwise unobserved intangible assets (Brynjolfsson, et al., 1999).

Intangible assets are very important because of their ability to generate value. According to Kaplan and Norton, for this to occur they must be adequately aligned with the organization strategy and integrated programs must be undertaken to enhance all intangible assets in a coordinated way (Kaplan, et al., 2004).

Hughes & Morton's research show that the "productivity gains and competitive advantage to be gained from IT lie not in the technology per se but in the way that assets such as organizational processes, embedded know-how, people skills and new organizational structure innovations all can lead to new products and processes creating further sources of sustainable competitive advantage" (Hughes, et al., 2006 p. 52).

"The key to managing intangible assets is to measure their degree of 'readiness' – which is defined as the extent to which the intangible asset meets the requirements of the enterprise's overall strategy" (Kaplan, et al., 2004 p. 1).

Kaplan and Norton group intangible assets into three main categories: Human capital (the skills, talent, and knowledge that a company's employees possess); Informational capital (the network, databases, information systems, and infrastructure of the organization); Organizational capital (culture of the corporation, leadership of the company, how aligned the employees are with the strategy of the organization, and the ability of the employees to share knowledge) (Kaplan, et al., 2004).

"Human capital is the economic value an organization derives from (a) application of knowledge, (b) collaboration, and (c) engaged individuals" (Armitage, et al., 2006 p. 20), "Information capital relates to how organizations utilize their information systems, networks, manuals, databases, files and infrastructure to gain competitive advantage and to execute strategy" (Armitage, et al., 2006 p. 21) and "Organizational capital is the firm's ability to connect employee goals to corporate goals" (Armitage, et al., 2006 p. 22).

## 2.5   The role of the Employee Portal

Intranets, central document repositories and knowledge databases are important information capital assets and perform an important role in the corporation strategy when used effectively (Armitage, et al., 2006).

These tools evolved from a communication and information-sharing stage to a consolidated workplace (Razorfish, 2008) (Forrester Research, 2010) and they are essential to promote communication, collaboration and sharing information within the organization (Urbach, et al., 2009), they contribute to the corporate performance improvement and they seek to improve the ability to deliver the right information to the right people at the right time (Stancich, et al., 2000).

But to be qualified as a source of sustained competitive advantage they must add value to the organization, must be rare, inimitable and non-substitutable (Gomes, et al., 2012 referring to Barney, 1991). Therefore to evaluate the intranet as a strategic tool, its current and potential contribution to the organizational business strategy must be analyzed (Stancich, et al., 2000 p. 262).

Stancich and Curry, conclude that "to obtain maximum value from an intranet, both the 'soft' cultural issues of information sharing and change in work processes must be addressed alongside the 'hard' systems issues of managing the intranet as an information system and a business resource" (Stancich, et al., 2000 p. 255).

In an article about obtaining competitive advantage through employees, Jassim (2002), supports the importance to ensure top management commitment and sponsorship and

evidences that one of the sources of competitive advantage is the employees and "it really depends on employee's attitudes, competencies and skills; their ability to generate commitment and trust, communicate aspirations and work in complex relationships" (Jassim, 2002 p. 1).

"Information and the way it is used can sustain a competitive edge in business but there must be a shift in the perception of time spent looking for learning and best practice as unproductive; willingness has to emerge to foster a networking, information sharing culture, which inevitably has to be a part of organizational culture. Using the intranet has to become part of everyday working life without engendering a feeling that such use is a waste of time and does not constitute 'work'" (Stancich, et al., 2000 p. 250).

Therefore the implementation of intranets must come with an adequate change in culture, behaviour and processes. And for that to occur, change management initiatives, top-down commitment and frequent examination are critical.

Before undertaking the path of researching and understanding how Intranet adds value to the organization, becoming a source of sustained competitive advantage, it's worthwhile setting the standards considering the terms that are used in this field.

It is common understanding among academic through the evidence of the reviewed literature (Gralla, 1996; Blackmore, 1997; Greer, 1998; Stancich & Curry, 2000; Parks cited in Yen and Chou, 2001) that Intranet can be defined as an internal network that uses Internet technologies and standards and that is accessed internally by authorized users to share information and knowledge.

Going a little further on the evolution of these tools according to some known maturity frameworks (Gartner, 2010) (Razorfish, 2008) (Forrester Research, 2010) (Hawking, et al., 2003) Intranet evolved to Portals and they are now much more complex solutions serving other organization objectives. For the Meta Group, Enterprise portals are replacing first-generation intranet Web sites as a more effective, efficient, and flexible means of managing and delivering applications and information to diverse sets of users (Meta Group, 2002).

One of the first definitions of a portal in the corporate context appeared in a Merrill Lynch report. In this report Shilakes & Tylman, consider a portal was "applications that enable companies to unlock internally and externally stored information, and provide users a single gateway to personalized information needed to make informed business decisions." (Shilakes, et al., 1998 p. 8).

Table 1: Portal Definitions over time

| Year | Author | Definition |
|---|---|---|
| 1998 | Shilakes & Tylman | "Enterprise information portals are applications that enable companies to unlock internally and externally stored information, and provide users a single gateway to personalized information needed to make informed business decisions." |
| 2000 | Detlor | "Enterprise portals are single-point web browser interfaces used within organizations to promote the gathering, sharing and dissemination of information throughout the enterprise. As such, these tools offer corporations a means by which to manage and access information from disparate sources across the firm." |
| 2002 | Chan and Chung | "An enterprise portal is any system that allows users to use the web browser to get all corporate information he needs. A portal is a flexible information technology platform that allows dispersed sources of information to be linked together while providing users the opportunity to customize what they need from the information source." |
| 2005 | Daniel and Ward | "Enterprise portals are secure web locations, that can be customized or personalized, that allow staff and business partners access to, and interaction with, a range of internal and external applications and information sources. Uses of the portal may include: improved access to information, increased collaboration, greater use of existing applications, and effective integration between applications." |
| 2007 | Chan and Liu | "A corporate portal is a web-based platform to access with security a broad range of information, services, applications, and expertise." |
| 2008 | Gartner | "Web software infrastructure that provides access to, and interaction with, relevant information assets (for example, information/content, applications and business processes), knowledge assets and human assets by select targeted audiences, delivered in a highly personalized manner." |

Source: A Conceptual Model for Measuring the Effectiveness of Employee Portals, (Urbach, et al., 2009 p. 2); Magic Quadrant for Horizontal Portal Products (Gartner, 2008 p. 4)

According to Urbach et al. (2009), following other authors, to identify some of the main functionalities that incorporated portals and made them more complex and integrated tools. And they say "enterprise portals have evolved from low-end intranets into highly integrated IS. Today, such portals enable the integrated support of information, communication, applications, and business processes." (Urbach, et al., 2009 p. 2).

In terms of their target user group (or audience), enterprise portals can be classified as supplier (or business partners), customer or employee portals (Forrester Research, 2008) (Urbach et al., 2009 following Riempp, 2002) (Gartner, 2008).

Figure 8: Portal categories according to audience. Source: (Forrester Research, 2008)
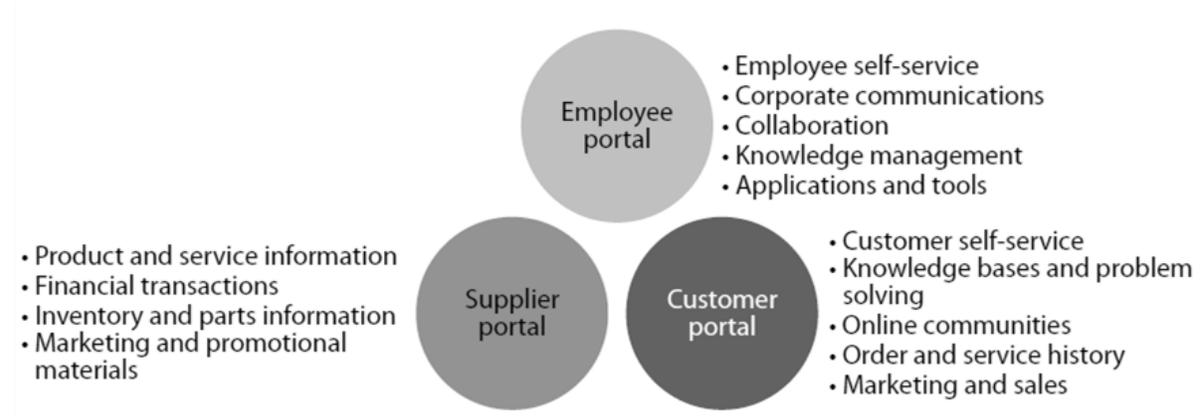


Sugianto & Tojib say employee portal uses "web-based interface to access personalized information, resources, applications, and e-commerce options" that employees can access through a network connection. These portals "are provided with relevant proprietary information displayed in a password-protected setting" (Modeling User Satisfaction with an Employee Portal, 2006 p. 240). Forrester Research defines them as "internally facing sites that serve workers' information and self service needs" (Forrester Research, 2007 p. 1).

The role of the employee portal has become crucial in many organizations, especially because they integrate information, tools and business applications and processes (Urbach et al., 2009 following other authors) and as a tool that drives corporate strategy, improving teamwork, establishing a communications strategy and improving employees career development, training and flexibility (Stancich, et al., 2000).

## 2.6  Employee Portal business drivers and outcomes

The Employee Portal was one of the tools for the new strategy and getting employees into this common platform may drive the company to experience some of the following benefits, among others:

- Improving corporate communication (Razorfish, 2008), (Prescient, 2009);
- Collaboration and sharing information between employees results in Opportunities for new business, faster development of products and services (Razorfish, 2008), (Prescient, 2009), (Nielsen Norman Group, 2009), (IBM, 2008), (Forrester Research, 2007);
- Improved employee service/convenience accessing information and services with moe autonomy of employees in managing HR processes and information, results in reducing costs, improving productivity and increasing satisfaction (Razorfish, 2008), (Prescient, 2009), (Nielsen Norman Group, 2009), (IBM, 2008), (Cisco, 2004);

- Internal processes improvement and break-down bureaucracy (Forrester Research, 2007), (Intranet Road Map, 2000);
- Easy access to integrated applications and information results in improvements of employee performance once they find information more easily and perform their jobs better (Forrester Research, 2007), (Intranet Road Map, 2000);
- Promotes a culture of sharing and collaboration (Intranet Road Map, 2000).

In a survey carried out with 261 US employers that planned to have an employee portal, Forrester Research identified top Business Drivers and Outcomes from Employee Portal Implementations. We noticed that promoting corporate culture and company alignment is not among the frequent answers obtained.

Table 2: Top Business Drivers and Outcomes from Employee Portal Implementations (Forrester Research, 2007)

| Top Business Outcomes | Top Business Drivers |
|---|---|
| "What results have you gained from deploying the employee portal?" (select all that apply) | "What are the most important business drivers behind your decision to consider or implement an employee-facing portal?" (select top three) |
| Improved employee service/convenience (77%) | Facilitate self-service for managers and employees (94%) |
| Greater process efficiency (59%) | Enable collaboration and information sharing (50%) |
| Cost, resource, or maintenance reductions (55%) | Automate business processes (40%) |
| Increased employee satisfaction (41%) | Reduce costs (25%) |
| Better visibility into business operations/metrics (36%) | Provide secure (remote) Web access (25%) |
| Greater employee loyalty/retention (32%) | Provide online training (17%) |
| New product, process, or service innovations (27%) | Control access to content or applications (10%) |
| Reduced cost from decreased Web/intranet design or management (27%) | Better govern corporate intranet (8%) |
| Cost reduction due to consolidated servers or software licenses (23%) | Allow access to operational dashboards on key business metrics (6%) |

## 2.7 Employee portal stages of maturity

An employee portal can be regarded as a specific type of enterprise portal. There are several maturity models and frameworks to analyze Employee Portals. The author has chosen Razorfish Maturity Framework because it is well aligned with the portal definitions used in the literature reviewed (Urbach, et al., 2009), (Gartner, 2008).

Hereafter we resume Razorfish framework different stages. Each subsequent stage of maturity generally includes the features from the stages preceding it.

Figure 9: Intranet maturity framework (Razorfish, 2008)
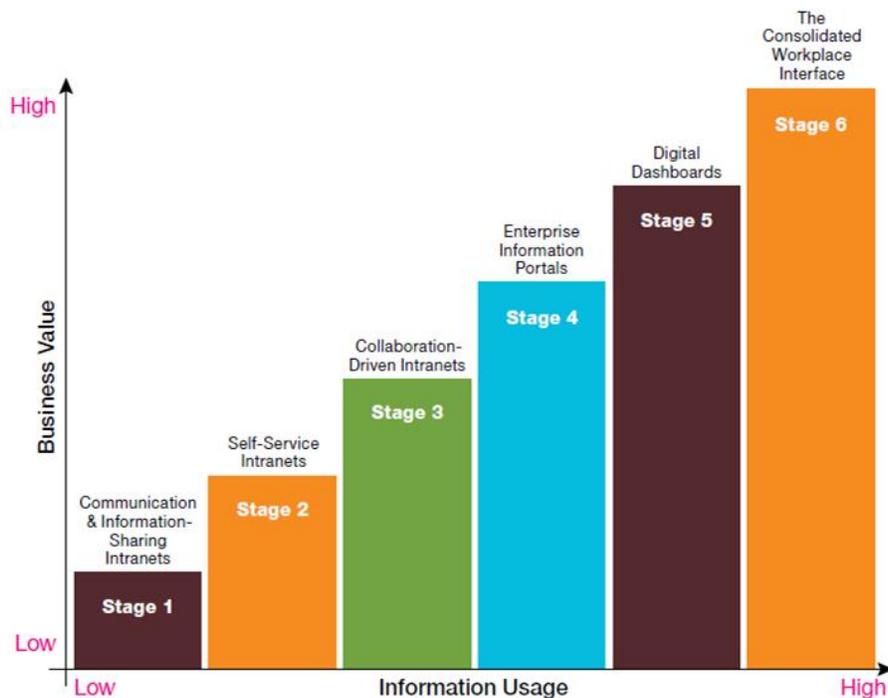


**Stage 1**: First-generation intranets are used primarily for communication and information sharing. Generally established by entrepreneurially-minded employees, they focus on communicating a department's purpose and activities to the rest of the company (Razorfish, 2008).

**Stage 2**: Self-service intranets focus on delivering HR, Finance and Facilities-related services to employees within a department or a company (Razorfish, 2008).

**Stage 3**: As intranets enter this stage, they move their focus to collaboration while continuing to improve the communication, information-sharing and self-service components. These intranets address the needs of project and department teams required to collaborate around specific initiatives and serve as a home for the communities of practices in an organization (Razorfish, 2008).

IBM (2008) refers also to a new form of collaboration that will turn collaboration into innovation. Hewlett-Packard is also using employee prediction markets to help drive sales forecasts.

**Stage 4**: These intranets include significant customization and personalization so that employees are provided only the information and tools needed for them to do their jobs. These intranets truly serve as employee productivity tools that enable employees to perform key business tasks (Razorfish, 2008).

**Stage 5**: Digital dashboards integrate real-time or near real-time information from data warehouses and business intelligence systems into an intranet interface. Targeted toward senior members of an organization, these intranets highlight the key performance indicators with which a company or a business unit can be managed (Razorfish, 2008).

**Stage 6**: These intranets integrate legacy applications, interfaces and partner portals into a single, consolidated dynamic interface for employees. In the organizations where these exist, they're often not even called intranets. They also integrate email, voice (through VoIP), and contextual tools (in other words, every digital artefact in a company is presented through a single interface) (Razorfish, 2008).

Forrester Research refers to the ultimate stage of intranets as the information workplace (Forrester Research, 2010), while IDC calls them the Enterprise Workplace (IDC, 2006), a new user experience platform. In the Razorfish Intranet Maturity Framework this stage is referred as The Consolidated Workplace Interface (Razorfish, 2008).


## 2.8   ICT investments management

Although Employee Portal benefits are widely studied (Razorfish, 2008) (Forrester Research, 2007) (Prescient, 2009) (Cisco, 2004) (Nielsen Norman Group, 2009), it's common understanding the difficulty to identify the Return on Investment of ICT[1] projects, specially because the majority of benefits are intangible.

Intangible assets "aren't easy to measure, so managers often pay far less attention to them than to tangible investments like plants and equipment, but these capabilities give investors confidence in future earnings" (Ulrich, et al., 2004 p. 119).

In ICT projects, networks, computers and software are just a small part of the entire implementation costs and it's the complementary investments that deliver the majority of benefits (Ward, et al., 2006). Brynjolfsson, Hitt, & Yang say that "successful projects require enormous management attention, worker training, and changes in seemingly unrelated areas of the business" (Brynjolfsson, et al., 2002 p. 9).

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[1] In the reviewed literature we found references to Information Technology (IT), Information Systems (IS) and Information and Communication Technology (ICT). In this study we will use ICT as an extended synonym of IT and IS.

It's consensus among academics and practitioners that ICT investments should be carefully justified, measured and controlled (Milis, et al., 2009) but a surprising percentage of enterprises failed to adopt fundamental best practices around portal sponsorship and governance and despite increased pressure to justify portal investments, a remarkable 91% of companies surveyed by Forrester Research report they do not measure or do not know if they measure the returns on their portal investments. This is consistent with broader trends that Forrester sees in which companies measure the expected value of ICT investments upfront to develop a business case, but they often fail to develop ongoing measures to assess the business value they actually realize (Forrester Research, 2007).

"Research strongly indicates that the feasibility study of capital investments in today's companies and organizations is mainly based on financial cost-benefit analysis" (Milis et al., 2009 following other authors, p.4).

This might happen because most ICT investment decisions still remain in finance managers and because capital investment-appraisal techniques (CIAT) are well known, understood and practiced (Milis et al., 2009 following other authors).

All of these techniques consist on comparing costs and the economic benefits. "Benefits generated by an intranet not only serve the case for initial development but also the case for sustainability to ensure that the intranet develops into a genuinely value-added tool for the business" (Stancich, et al., 2000 p. 255).

Forrester Research analysts suggest that exclusively using financial measures has serious flaws: (1) There is a wide variety of financial measures in use today with multiple interpretations; (2) They imply a precision that doesn't exist, because the measures are calculated by a formula and we can only estimate the benefits; (3) They often fail to account for intangible benefits; (4) They don't account for future opportunities; (5) They fail to incorporate risk (Forrester Research, 2006).

Therefore, it is essential to identify all the benefits to perform an adequate Benefits Management.

## 2.9 Benefits Management

Milis, et al. (2009) say the ratio of tangible to intangible and hidden benefits tends to be much smaller for ICT projects than in other projects. They use the term "iceberg investments" used by Hinton & Kaye, 1996 to speak of the large proportion of the benefits that are "hidden" (Milis, et al., 2009).

The need to carefully justify, measure and control benefits of ICT investments should lead to the need of understanding them. Actually, "not all investments will be able to be justified financially". However, the ability to explicitly measure the benefits is essential to their delivery. Additionally "Reviewing the benefits that are, and are not, realized from each

investment, is essential, if an organization is to increase the value it obtains from all its IS/IT investments" (Ward, et al., 2006 p. 356).

Figure 10: The value of benefits management, taking a major pharmaceutical company as an example (Ward, et al., 2006)
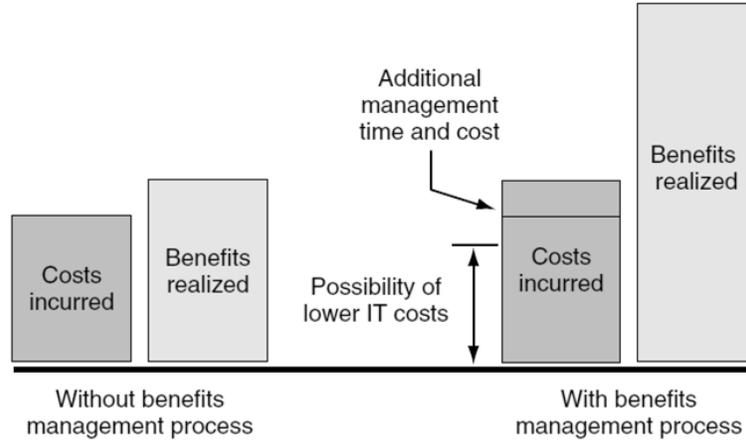


"The benefits management approach was developed to enable organizations to improve the value realized from specific investments" but it can also be used "to formulate, manage and implement strategic change programmes" and to "help formulate and implement business strategies" (Ward, et al., 2006 p. 383). Lin & Pervan agree that "the process model of benefits management developed by the Cranfield research program can be used as the basis for guidelines on best practice in benefits management" (Lin, et al., 2001 p. 15).

John Ward and Elizabeth Daniel propose the following benefit classification matrix according to contribution explicitness, and considering four levels based on the ability to assign a value to the benefit.

Table 3: Benefits classification according to contribution (Ward, et al., 2006)

| Degree of explicitness | Do new things | Do things better | Stop doing things |
|---|---|---|---|
| Financial | By applying a cost/price or other valid financial formula to a quantifiable benefit a financial value can be calculated | | |
| Quantifiable | Sufficient evidence exists to forecast how much improvement/ benefit should result from the changes | | |
| Measurable | This aspect of performance is currently being measured or an appropriate measure could be implemented. But it is not possible to estimate by how much performance will improve when the changes are complete | | |
| Observable | By use of agreed criteria, specific individuals/groups will decide, based on their experience or judgement, to what extent the benefit has been realized | | |

The benefits dependency network is a key output from the activity of determining the changes required for the delivery of each benefit and how the ICT development will enable these to occur (Ward, et al., 2006), (Peppard, et al., 2007).

"The BDN provides a framework for explicitly linking the overall investment objectives and the requisite benefits with the business changes which are necessary to deliver those benefits and the essential IT functionality to both drive and enable these changes to be made" (Peppard, et al., 2007 pp. 10,11).

Figure 11: The benefits dependency network (Ward, et al., 2006)
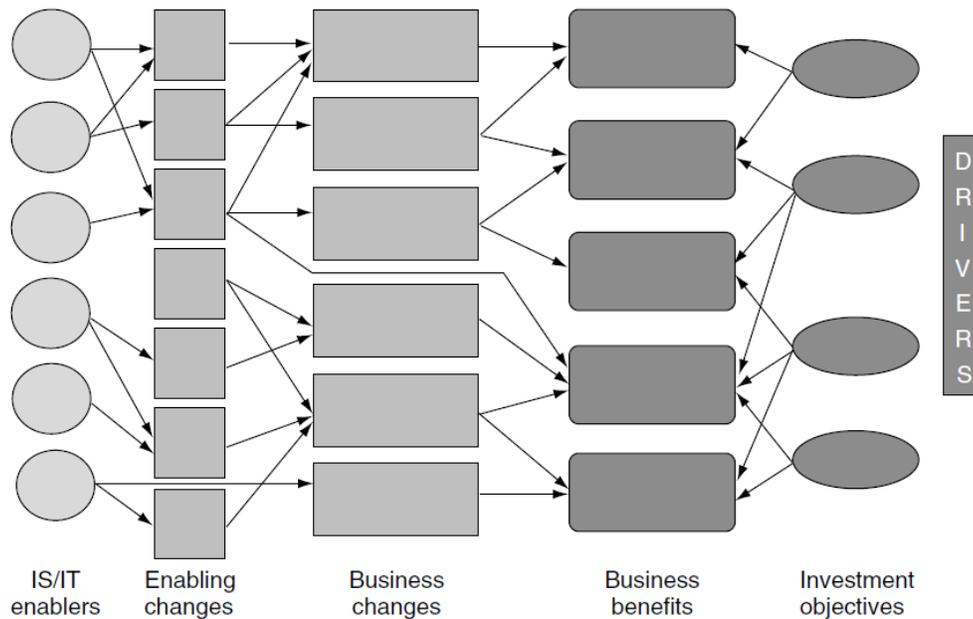


The development of the Benefits Dependency Network varies, depending on whether a problem-based or innovation-based investment is being considered. Whether the case, the "development of the Benefits Dependency Network not only enables the knowledge and experience of business managers to be applied more coherently to planning the investment, but it also creates a clearer understanding of how different groups need to work together to achieve the benefits they and the organization wish to gain" (Peppard, et al., 2007 p. 20) and of the changes needed to deliver those benefits (Peppard, et al., 2007).

"There's a clear understanding that benefits only occur from active involvement of business managers in defining and owning those benefits and carrying out the changes that deliver them" (Ward, et al., 2006 p. 356).

## 2.10 The importance of change management

Change management initiatives seem to be understood as valuable to ensure project delivery and overall success. "New technology is not transformational on its own" (…) "appropriate use requires considerable complementary investment in people, processes, culture and support" (…) "some or all of these things are usually missing" (Ward et al., 2006 p. 33, referring to a Report by the iSociety, 2003).

The delivery of the majority of benefits from ICT initiatives is due mainly to the complementary investments an organization makes in changes to the way business is performed and resources are deployed (Ward, et al., 2006, referring to Brynjolfsson and Hitt, 2000).

Lin, et al. (2001) referring to Truax (1997) suggest a number of reasons for organizations not getting the benefits they expected. Amongst them, they point out: (1) The ''right'' benefits are difficult to identify up front; (2) Organizations often have a limited ability to manage change.

Employee portal projects are complex, time and cost-consuming, with a high risk of failing (Urbach, et al., 2009 referring to Remus, 2006). A recent study from Gartner Research presented at the "2012 Portal, Content and Collaboration Summit", shows that 40% of portal initiatives fail to get adequate adoption to achieve ROI (Prescient, 2009) and the most frequent causes of partial or total failure is the undervaluation of the organizational aspects in change. In fact, most of the companies manage the implementation project in a purely technical perspective without systematically facing the organizational and the change management requirements (Martinia, et al., 2009).

The Standish Group research shows a staggering 31,1% of projects will be cancelled before they ever get completed. Further results indicate 52,7% of projects will cost 189% of their original estimates (The Standish Group, 2009). And although there is some controversy about the Chaos Report figures (Eveleens, et al., 2010), it also shows the results of survey on ICT executive managers opinion about the reason projects succeed, and according to their opinion the three more relevant are (1) User Involvement; (2) Executive Support; (3) Clear Business Objectives (The Standish Group, 2009).

In a detailed study carried out by McGolpin and Ward about strategic ICT investments, "commitment and involvement of senior management has been identified (…) as a success factor, but although all the projects were commissioned by senior management, only the (…) successful ones had involvement maintained throughout the projects" (Ward, et al., 2006 p. 45, referring McGolpin and Ward, 1997).

This study also found that "the highly successful projects, existing change management processes were used to ensure that the business maximized the value of the ICT investment through associated changes to business practices" (Ward & Daniel, 2006 p. 46, referring McGolpin and Ward, 1997).

It's common understanding among academics and practitioners that adequate change management and sponsorship is very important to the success of undertaken projects, which generate benefit and generate value to the organization. Although there's still a high percentage of project failure which clearly demonstrates that this management techniques and behaviours are not being adopted or correctly implemented.

## 2.11 Literature review summary

To better understand the subject under study, we reviewed literature related with the importance of intangible assets, employee portals, ICT investment management and the importance of change management. Some of the major evidences found in this review are:

(i)     Intangible assets relevance is growing;

(ii)    Leadership, teamwork and communication are important ingredients in organizational capital once they provide the ability to adapt, and to make the changes required to execute on the strategy;

(iii)   the development of a corporate culture is essential to promote collaboration, sharing knowledge and innovation;

(iv)    Strategy maps provides a visual framework to communicate strategy and highlighting how the organization intends to create value;

(v)     Intranets and Employee portals are strategic tools;

(vi)    Benefits management is an important approach to improve the value realized from specific investments - it is essential to review the benefits that are, and are not, realized from each investment, to increase the value it obtains from all its ICT investments;

(vii)   Adequate change management is essential to ensure project delivery and overall success of ICT investments.

We also looked into benefits management and Benefits Dependency Network as a tool to identify Benefits and into Strategy Maps as a tool to communicate company strategy. Finally we developed a theoretical framework – described hereafter – to address some of the limitations we believe strategy maps have:

(i)     Strategy maps don't evidence interrelation between assets, which is important to understand each ones' contribution and value;

(ii)    Strategy maps internal perspective doesn't consider support processes;

(iii)   Strategy maps don't show how internal processes impact assets, what we believe it's limitative to understand the processes that create value within an organization;

(iv)    They lack of detail on enabling changes, which is essential to identify strategic projects and programs in the organization.

The development of a framework to address the limitations of a tool of reference, like strategy maps, is itself a contribution of this thesis, which was validated by blind referee of an international conference (How Employee Portal Contributes for the Intangible Assets Value Creation, 2013).

# 3   Framework

As said previously, Strategy Maps are important frameworks to communicate strategy and to show how intangible assets align with strategy to create value for the organization. However somewhat absent from this framework is the evidence of interrelation between assets, the identification of support processes, the positive impact of internal processes in intangible assets and the identification of strategic enabling changes. Therefore in our view, the model (Strategy Maps) can be complemented and reinforced with these elements resulting in a stronger framework to help organizations enhancing their strategic knowledge, to reduce the risk of projects failure, and to capture real value from their investments.

## 3.1   Modifications to Strategy Maps

**i. Strategy maps don't evidence interrelation between assets**

There are many academics supporting the resources-based view of the firm where different assets depend on each other to create value – they are interconnected (Marr, et al., 2004). Marr and his colleagues say that "the contribution of one asset, lets say technology, can rarely be expressed independently from other assets, such as skills, expertise, or corporate culture" (Marr, et al., 2004 p. 318).

In Strategy Maps, Intangible assets are presented separated and categorized, they are connected with value-creating processes independently and there's no connection between them. But they cannot be seen separated from each other and it's obvious that Human Capital (Skills, Talents, Know-how and Information) often depends on the technology available and it's hard to imagine Information Capital (Databases, Information Systems, Networks and Infrastructure) existing without the right skills and know-how. Organization Capital (Culture, Leadership, Alignment and Teamwork) influences Human Capital and vice versa (adapted from Marr, et al., 2004 to fit asset structure used in strategy maps). We believe that, even between different Organizational Capital assets, should be dependencies (the right Culture it's essential to create Leadership, Alignment and Teamwork behaviours).

Exploiting asset complementarity allow assets to be used more efficiently strengthening organization's competitive advantage (Iversen, 2000), (Hughes, et al., 2006). Marr and colleagues believe "that efficient management of organizational assets is impossible without understanding the interrelationships and interdependencies of such assets" (Marr, et al., 2004 p. 318) and Kaplan et al. (2004) say that intangible assets value derives from their interrelation and cannot be measured independently.

The Value Creation Map, developed by Marr to complement Kaplan and Norton's original strategy map, identifies both the direct and indirect dependencies of performance as well as

differences in importance. Understanding the relative importance of specific assets in the creation of capabilities and value enables better resource-allocation decisions (INSEAD, 2005).

Figure 12: An example value creation map (INSEAD, 2005)
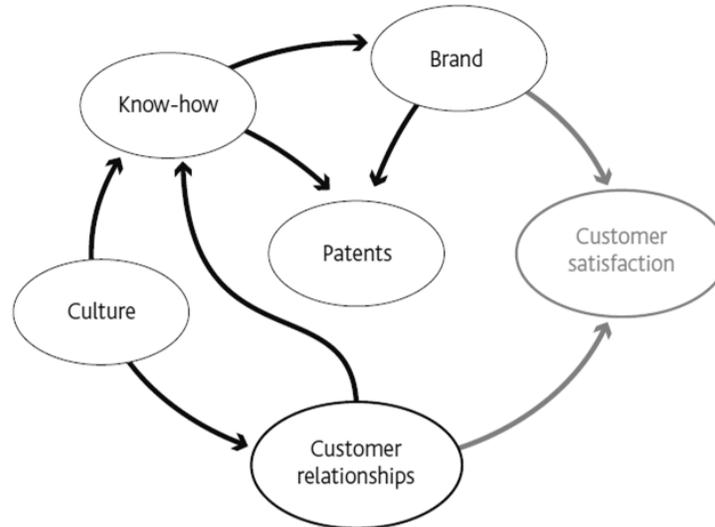


"IT has great enabling capacity for making other organizational resources more easily accessible and shareable. However, to derive competitive benefits from synergy, firms need to create social context and reciprocity inherent in shared practice" (Bharadwaj, 2000 p. 176).

Brynjolfsson and colleagues conclude about their analysis on intangible organizational and ICT assets complementarity that "the market value of a firm that has leveraged computer assets with organizational investments should be substantially greater than that of a similar firm that has not" (Brynjolfsson, et al., 2002 p. 4). Ulrich (2004) also highlights the need to "recognize the interdependence of capabilities. While you need to be focused, it's important to understand that capabilities depend on one another" (Ulrich, et al., 2004 p. 126).

To overcome this limitation in strategy maps, and based on the importance to identify and communicate assets synergies, it is suggested the introduction of the "asset synergies" concept in the proposed theoretical framework (the graphical representation can be seen down bellow in Figure 19).

### ii. Internal perspective doesn't consider support processes

From the literature review, it's understood that in the internal perspective, strategy maps only identify the most important processes that create desired outcomes for customers and shareholders. There is no focus in support processes (i.e.: Corporate Communication, HR management, Project Management or Quality Management). As an example, Corporate

Communication is known as essential to perform adequate change when implementing Corporate Culture (White, et al., 2010).

Organization capabilities like Talent, Speed, Shared mind-set and coherent brand identity, Accountability, Collaboration, Learning, Leadership, Customer connectivity, Strategic unity, Innovation or Efficiency are "the outcome of investments in staffing, training, compensation, communication, and other human resources areas" (Ulrich, et al., 2004 p. 119).

In its Strategic Plan for Knowledge Management, NASA identified culture as one of the critical success factors for knowledge management and they consider that the top management leadership is essential to become an organization that shares knowledge broadly. NASA identifies education and training programs and several knowledge management activities that "will build upon and bridge the existing capabilities and resources to deliver an integrated suite of processes and tools to help share information across the Agency" (NASA, 2002 p. 20).

Figure 13: Critical success factors for knowledge management (NASA, 2002)
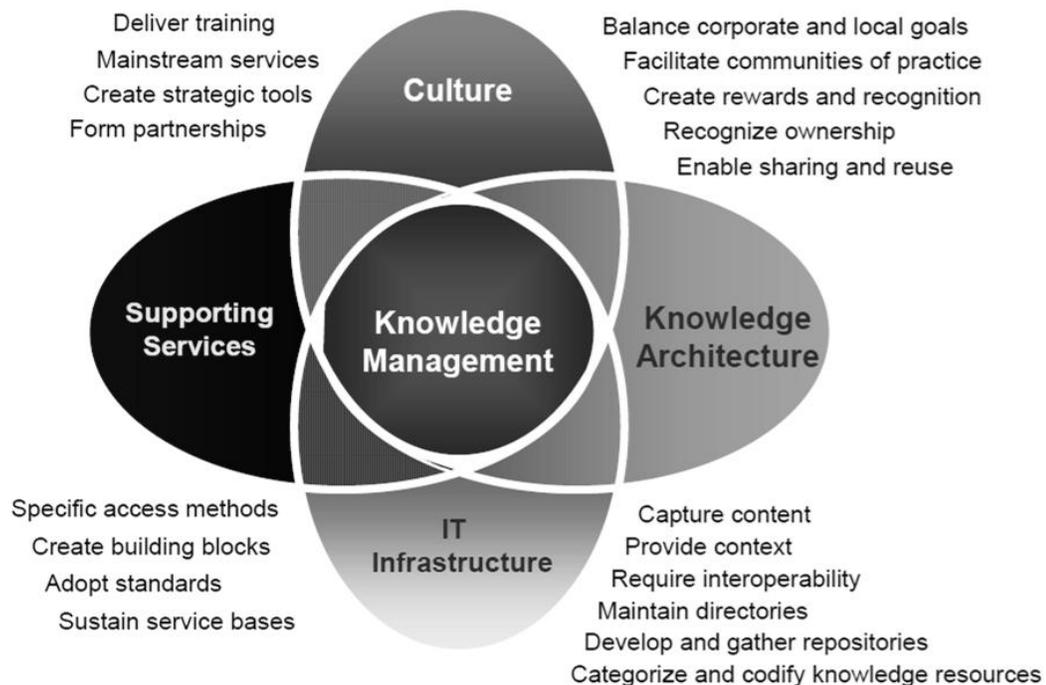


Social aspects related to organizational change needed to implement knowledge management processes (Bharadwaj, 2000) are managed in organizations' support processes.

To overcome this limitation it is suggested the introduction of a "support processes group" in the internal perspective of the proposed theoretical framework (the graphical representation can be seen down bellow in Figure 19).

### iii. Strategy maps don't show how internal processes impact assets

According to Kaplan, et al., value is created in the organization through its managed internal processes and the development of human, information and organizational capital. They group internal processes into 4 main clusters: (1) Operations Management processes, (2) Customer Management processes, (3) Innovation processes and (4) Regulatory and Social processes (Kaplan, et al., 2004).

Figure 14: Value-creating processes in Strategy Maps (Kaplan, et al., 2004)
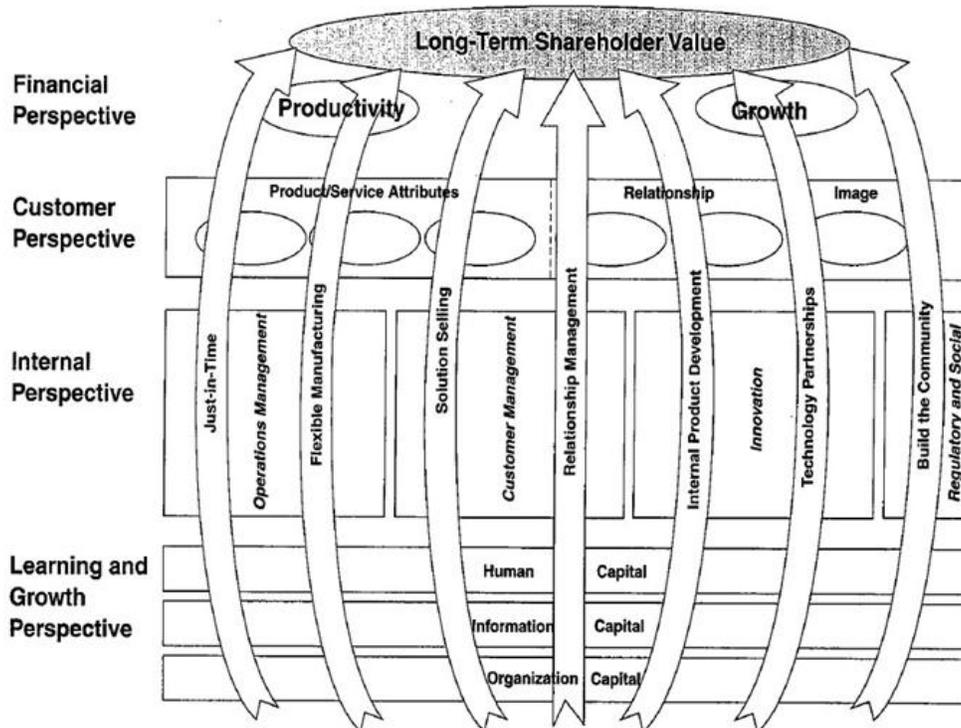


Ulrich, et al., identify organizational capabilities (collective skills, abilities, and expertise) as relevant intangible assets to the value generation. These capabilities "are the outcome of investments in staffing, training, compensation, communication, and other human resources areas. They represent the ways that people and resources are brought together to accomplish work" (Ulrich, et al., 2004 p. 119).

Casadeus-Masanell, et al., (2007 p. 5) define business model as "a set of choices and consequences" and identifies intangible assets as consequences and not choices. They also describe virtuous cycles as feedback loops generated by business models dynamics that iterate and strengthen some components of the business model (Casadeus-Masanell, et al., 2007).

"Communication influences culture and culture influences communication. The perception of a positive sense of community inside an organization contributes to a positive organizational culture" (White, et al., 2010 p. 8).

Another example of this kind of feedback regards to organizational change required to perform efficient knowledge management processes. Creating a culture for knowledge management requires changes to Intangible assets like organization structure, information systems and reward structures (Bharadwaj, 2000).

To overcome this limitation it is suggested the introduction of the "virtuous process feedback" concept in the proposed theoretical framework (the graphical representation can be seen down bellow in Figure 19).

### iv. Lack of detail on enabling changes

From the literature review, it's understood that strategy maps don't identify the enabling changes (i.e.: training, new working practices, communication) that are performed. "Changes that are prerequisites for achieving the business changes or that are essential to bring the system into effective operation within the organization" (Ward, et al., 2006 p. 109).

Bharadwaj (2000) following Marshal, also highlights the difficulty for Organizations to manage effectively both ICT and social aspects of knowledge management. He states that this "social process requires tremendous organizational Change" and identifies organization structure, control and communication systems and rewards structures as the assets that experience changes. (Bharadwaj, 2000 p. 176).

As seen before, the importance of an adequate change management and sponsorship in order to guarantee the success of undertaken projects is common understanding among academics and practitioners and Strategy Maps don't answer to this concern.

To overcome this limitation we suggest the introduction of the "enabling changes layer" in the proposed theoretical framework (the graphical representation can be seen down bellow in Figure 19).

## 3.2 Theoretical Framework

Kaplan and Norton found that it's important to use visual representations of strategic intent to help understand how organizational resources are used to create value (Kaplan, et al., 2004). After understanding what we perceived as Strategy Map limitations, literature was reviewed regarding other models and frameworks to analyse which and how can they be used to complement Strategy Map.

Benefits Dependency Network, Business Model Representations, DeLone and McLean IS success model, Knowledge Assets Map, Organisational Key Resource Map, Success Map, Value Creation Map and Value Network Analysis Diagram were looked (Allee, 2000) (INSEAD, 2005) (Ward, et al., 2006) (Casadeus-Masanell, et al., 2007) (Marr, et al., 2004) (Urbach, et al., 2009).

Most of them follow the creation value flux of cause-effect shown in Soh and Markus's Model (Soh, et al., 1995).

Figure 15: How IT creates business value (Soh, et al., 1995)
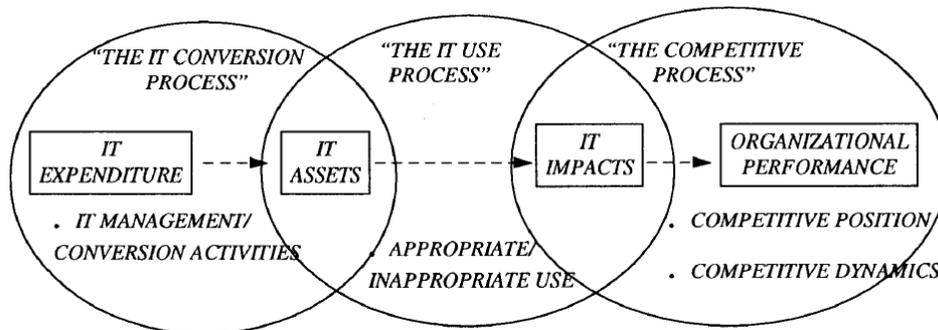


Marshall et al. (2005) proposed a modification to Soh at al. model in order to consider the IT alignment process, showing that IT expenditure is part of strategic imperatives of the organization.

Figure 16: Modified model for business value creation from IT (Marshall et al., 2005)
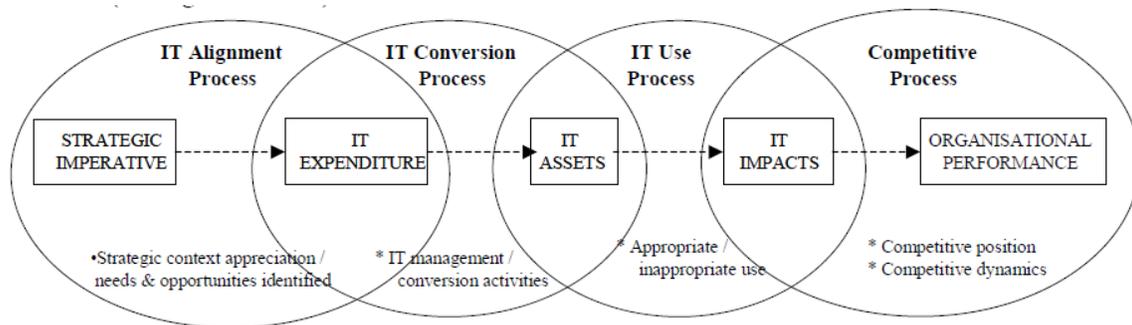


Benefits Dependency Network and Strategy Map are both tools that expose and depict strategic alignment.

"The BM approaches through the benefits dependency network, draw on a map all the objectives, benefits and changes needed from the business drivers and the path to reach them, setting responsibilities, targets and performance measures" (Gomes, et al., 2012 p. 7). Although its main focus is to determine the changes required for the delivery of each benefit and how will ICT assets enable these changes, it's believed that this tool could be

used with Strategy Map, complementing it and helping to overcome some of the identified limitations.

Bradley (2006) states that "end objectives" are ideal for communicating programme purpose to a wider audience. These objectives provide a solid basis for building Benefits Maps and they are determined from strategy maps "long term objectives" (usually two or three primary or bounding objectives) (Bradley, 2006).

Ward (2006) defines "Investment Objectives" as "Organizational targets for achievement agreed for the investment in relation to the drivers. As a set they are essentially a description of what the situation should be on completion of the investment" (Ward, et al., 2006 p. 106). These organizational targets can be related with human or organizational capital.

Throughout the reviewed literature, examples of business benefits that consist in the strengthening of intangible assets were found. The value creation through the strengthening of assets like knowledge, culture, loyalty, image, brand, collaboration, custom orientation is identified as benefits by Allee (2000), Bharadwaj (2000) and Prescient Digital Media (2009). Organization capabilities "are the outcome of investments in staffing, training, compensation, communication, and other human resources areas" (Ulrich, et al., 2004 p. 119).

"Enabling changes layer" consists on the addition of a new layer in Strategy Map corresponding to the Benefits Dependency Network enabling changes Layer. And "virtuous process feedback" should be addressed by the transposition of the BDN "investment objectives" layer into the Strategy Map "Intangible Assets" and "Long-term objectives" layers.

Figure 17: Strategy Map, Benefits Dependency Network "stack" visual presentation
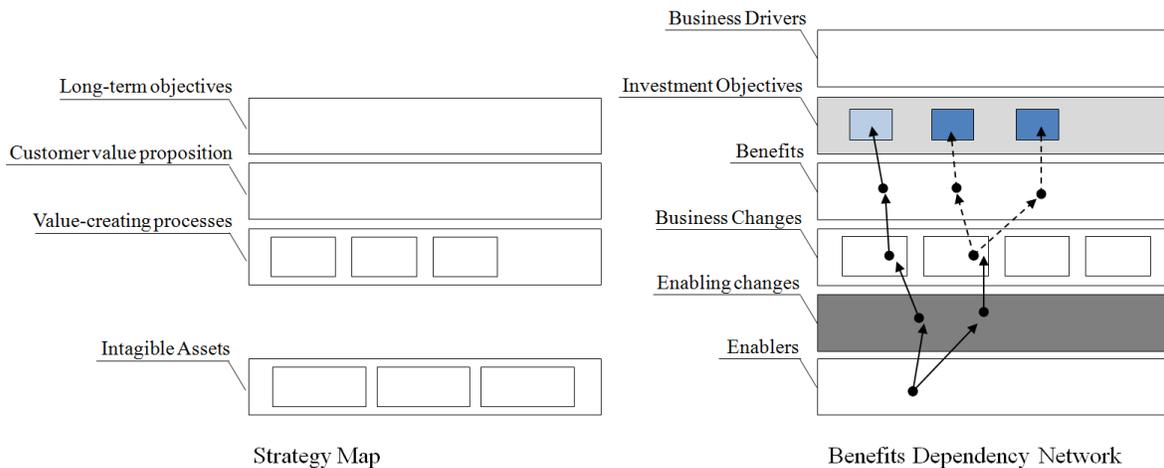
Figure 18: Framework visual presentation
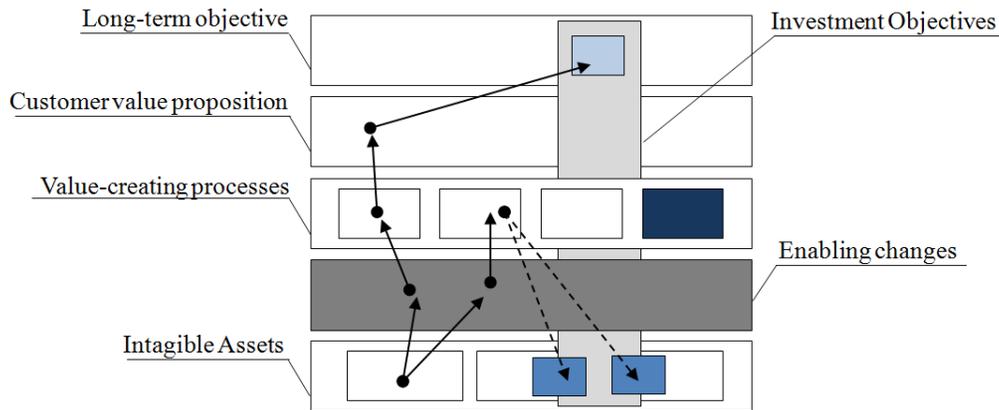


"Support processes group" consists in the addition of this process group and the usage of Benefits Dependency Network to identify all relationships. "Asset Synergies" consist on visual representation of the direct dependencies and interrelation between assets.

Figure 19: Framework visual presentation addressing Strategy Map limitations
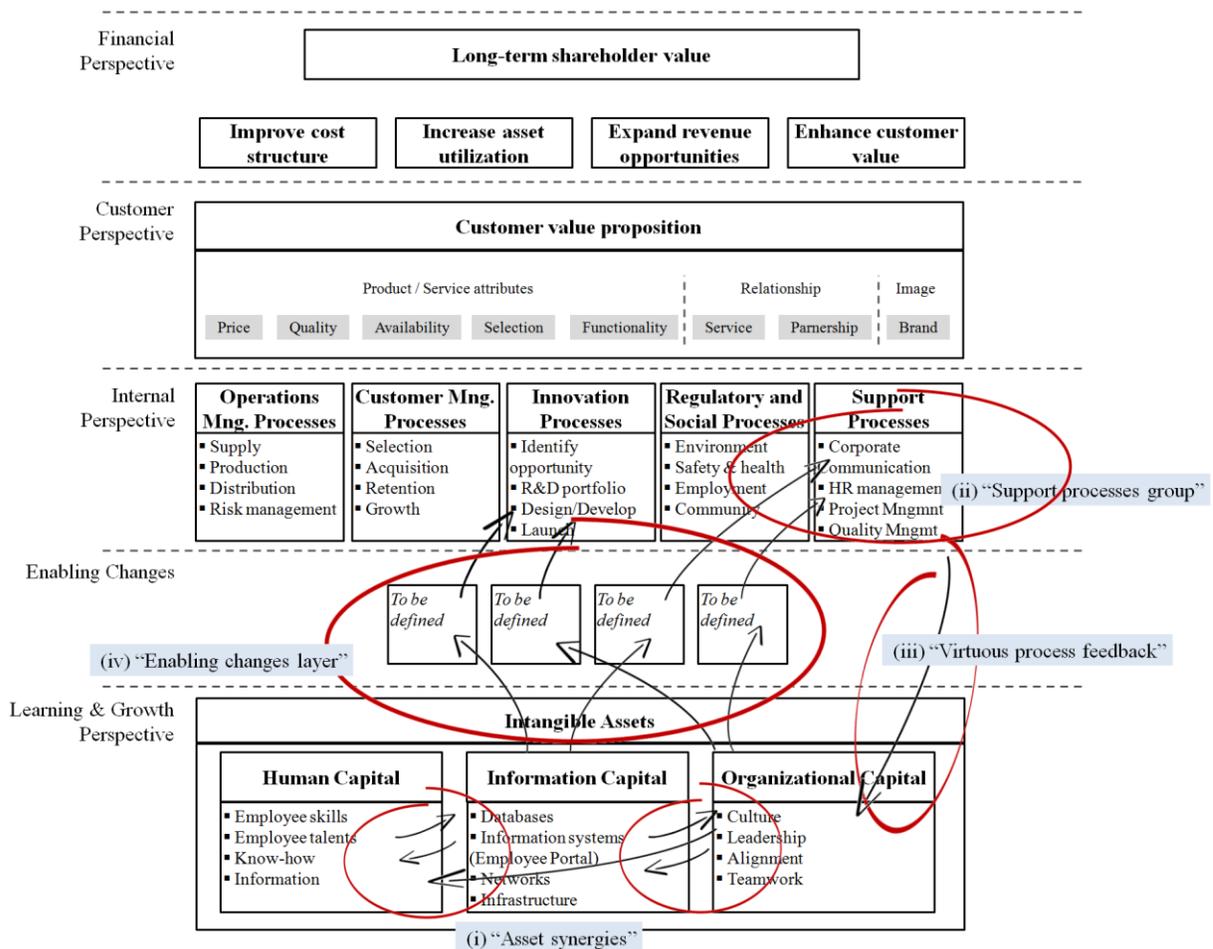
As we noticed in the case study, there is evidence that the proposed framework matches the organization concerns to communicate organization strategy, understanding how business value is generated and providing the information needed for a suitable top-down commitment and sponsorship, essential to perform adequate change management and benefits management. And during the current research there is commitment to prove the usefulness of this framework, via the case study in progress.

This framework was presented in the 15th International Academy of Management and Business (IAMB) Conference held in ISEG, Lisbon, Portugal in April 17-19, 2013 (How Employee Portal Contributes for the Intangible Assets Value Creation, 2013).

## 3.3 Application of the Framework

The literature reviewed is mostly related with (1) the importance of intangible assets in the value creation process of an organization, (2) employee portals as relevant information capital assets that perform important role in the organization strategy and (3) management concerns on justification, measurement and control of ICT investments.

During the literature review, we found significant sources of information regarding strategy maps and their use to communicate strategy. However, there was no evidence of studies on the combination proposed in the theoretical framework.

Strategy Maps are tools to capture organization's strategy in a visual form, in a way to facilitate communication of the company strategy, describing how an organization creates value for its shareholders, customers and/or citizens. Based on this finding we think it's essential to (1) communicate the way the organization enables changes, (2) identify the processes that generate value through positive impact in the organization intangible assets and (3) clarify the relationship and dependencies amongst intangible assets.

The proposed framework was developed to address these matters and to help understanding the cause-effect relationships that generate business value, as well as providing top management and decision makers the information needed for a suitable top-down commitment and sponsorship, essential to perform appropriate change management and benefits realization.

This employee portal case study was performed, as a means to understand how a corporate employee portal contributes for the intangible assets value creation process. And the developed framework was applied to understand if it helps organizations to enhance their strategy knowledge, to reduce the risk of investments failure or misuse, and a contribution to capture real value from them.

The case study developed in this thesis concerns the demonstration of potential linkages between organization's **Culture (OC1)**, **Alignment (OC2)**, **Teamwork (OC3)** and **Employee Portal (IC1)** Intangible assets, **Internal communication support process**

**(SP1)**, **Identification of opportunities** for new products and services innovation process **(IP1)** and the associated **enabling changes (ECn)** performed in the organization.

Figure 20: Elements subject of study
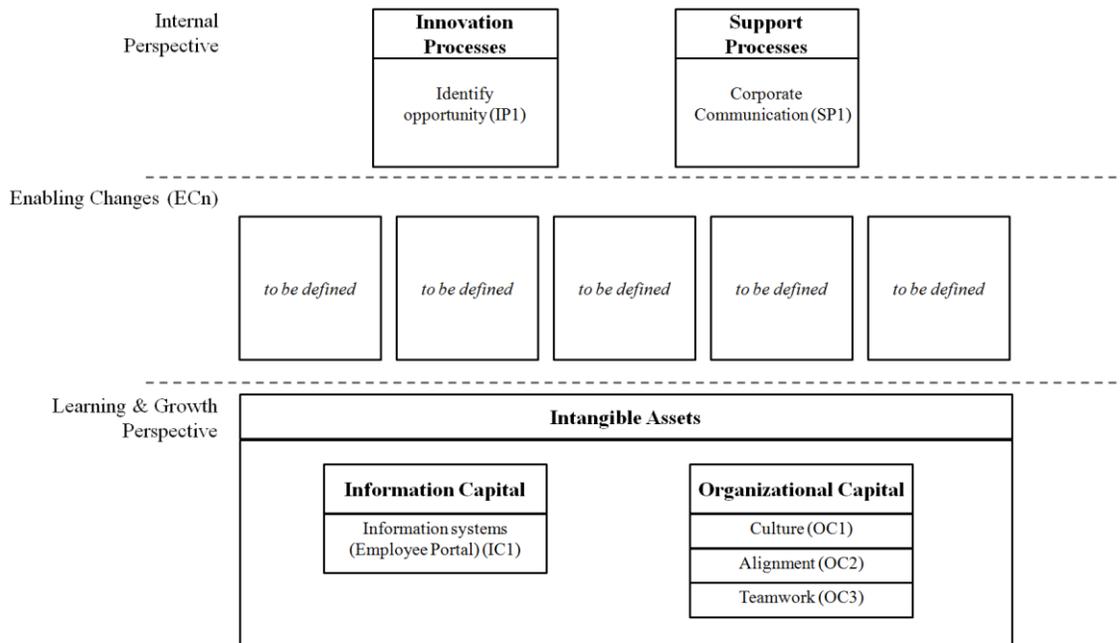


In the literature reviewed we found theoretical relationships of cause and consequence between the studied elements. The references supporting these relationships are identified in the following table.

Table 4: Existing linkage between studies "elements" found in literature review

| Impacts ↑ | OC1 | OC2 | OC3 | IC1 | SP1 | IP1 | ECn |
|---|---|---|---|---|---|---|---|
| OC1 | | | Bharadwaj (2000); NASA (2002) | Ward et al. (2006). | White, et al. (2010) | IBM (2008); Bharadwaj (2000); Sarros, et al. (2008); NASA (2002) | |
| OC2 | Estes (2007) | | | | | | |

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| OC3 | | | | | | Moos, et al. (2011); IBM (2008) | |
| IC1 | Stancich, et al. (2000); Urbach, et al. (2009) | Kaplan et al. (2004); Stancich, et al. (2000) | Stancich, et al. (2000); Urbach, et al. (2009) | | Kaplan, et al. (2004); Urbach, et al. (2009); Stancich, et al. (2000) | Moos, et al. (2011); IBM (2008) | Jassim (2002) |
| SP1 | White, et al. (2010) | Kaplan et al. (2004) | Ulrich, et al. (2004) | Ward et al. (2006) | | Ulrich, et al. (2004) | White, et al. (2010); NASA (2002) |
| IP1 | | | | | | | |
| ECn | Bharadwaj (2000) | Kaplan et al. (2004) | | Prescient Digital Media (2009); Martinia, et al. (2009); Ward, et al. (2006) | Ward, et al. (2006); Bharadwaj (2000) | | |

The case study was developed based on **corporate information review**, **interviews and organizational climate questionnaires** that helped to validate case study data.

We reviewed corporate documentation and conducted interviews to develop a BDN that helped to understand if and how does employee portals' communication, knowledge management and collaboration functionalities **(IC1)** contributes to corporate strategy through corporate alignment **(OC2)**, culture **(OC1)** and teamwork **(OC3)** and its' relationship with internal communication support process **(SP1)** and with the identification of opportunities for new products and services innovation process **(IP1)**. BDN was also helpful to identify Enabling Changes **(ECn).**

Organizational climate questionnaires helped to identify decrease or growth of certain aspects within organization.

### 3.3.1 Information capital

Information capital is the raw material for creating value in the new economy. It includes systems, databases, libraries and networks, and makes information and knowledge available to the organization (Kaplan, et al., 2004). For the current case study we considered only the

Employee Portal and focused mainly on communication, knowledge management and collaboration functionalities.

Information Capital has value only in the context of the strategy and its strategic alignment that determines the value of intangible assets (Kaplan, et al., 2004). Therefore to consider strategic importance of Employee Portal we must demonstrate current contribution and future potential (Stancich, et al., 2000).

Employee portals are essential tools to promote communication, collaboration and sharing information within the organization (Urbach, et al., 2009) and they contribute to improve the ability to deliver the right information to the right people at the right time (Stancich, et al., 2000). They should be seen as a tool that drives corporate strategy, improving teamwork, establishing a communications strategy and improving employees career development, training and flexibility (Stancich, et al., 2000).

### 3.3.2 Organizational capital

Organizational capital is the ability of the organization to mobilize and sustain the process of change required to execute the strategy. It provides the capability for integration and alignment of intangible and tangible assets with the strategy by changing employees' behaviour and it's built on culture, leadership, alignment and teamwork (Kaplan, et al., 2004).

### 3.3.2.1 Culture

Culture reflects the predominant attitudes and behaviours that characterize the functioning of the organization and can be a barrier or an enabler of change (Kaplan, et al., 2004).

Ulrich, et al. (2004) analyses technical and social skills in the individual and organizational perspective and identifies organizational capabilities as an organization's underlying DNA, culture, and personality represented in the organizational-social cell (see cell 4 in table 4 bellow).

Table 5: individual and organizational levels of analysis as well as technical and social skill sets (Ulrich, et al., 2004)

|  | Individual | Organizational |
|---|---|---|
| Technical | (1) An Individual's functional competence | (3) An organization's core competencies |
| Social | (2) An individual's leadership ability | (4) An organization's capabilities |

"These capabilities are the outcome of investments in staffing, training, compensation, communication, and other human resources areas. They represent the ways that people and resources are brought together to accomplish work. They form the identity and personality of the organization by defining what it is good at doing and, in the end, what it is" (Ulrich, et al., 2004 p. 119).

These intangible organizational resources value is well understood in the resources-based theory which recognizes them as key drivers of superior performance (Bharadwaj, 2000).

Estes (2007) defines strategic culture as the "combined effect of behaviors, norms, beliefs, values, heritage, thinking, and relationships and the way they manifest themselves in an organization and its strategic performance" (Estes, 2007 p. 2).

According to Kaplan et al. (2004) measurement of culture should be based on employee surveys and refers to the measurement instrument (the Organizational Culture Profile) developed by Charles O'Reilley and colleagues that maps organizational culture into 8 independent factors. Rather than mapping organizational culture, we intend to find its' linkage to other organization capital and find the contribution of Employee Portal and support processes.

### 3.3.2.2 Alignment

According to Estes (2007), "strategy alignment is the complete integration of every organizational component to the mission, strategic vision, planning processes, day-to-day decision making, and human performance systems" (Estes, 2007 pp. 1-2).

Alignment requires that all employees are empowered in the same direction. Leaders must create awareness of the high-level strategic objectives and then they must ensure that individuals and teams have local objectives and rewards that contribute to achieving targets for high-level strategic objectives (Kaplan, et al., 2004).

Most leaders will agree, the degree by which their vision is communicated effectively to each member of the organization in order that their contribution is aligned with the financial outcomes determines the success of that organization and this process of strategy alignment requires the creation of a "strategic culture" which is often the primary function of strategy alignment initiatives (Estes, 2007).

Kaplan et al. (2004) identifies brochures, newsletters, town hall meetings, orientation and training programs, executive talks, company Intranets, and bulletin boards as mechanisms of communication programs to create strategic awareness. Again, employee surveys are the way organizations use to measure if employees are aware of high-level strategic objectives.

### 3.3.2.3 Teamwork and Knowledge Sharing

According to Stevens and Campion (1994), Communication is one of the three subcategories of interpersonal Knowledge Skills and Abilities (KSA) an individual team

member should have in order to be an effective team contributor (The knowledge, skill and ability requirements for teamwork: Implications for Human Resource Management, 1994). They also say that communication networks or channels "can exert a powerful influence among team performance".

Companies must generate, organize, develop and distribute knowledge (either through a "push system" or by providing easy access when people are searching information relevant to their immediate needs). And there's no greater waste than a good idea used only once (Kaplan, et al., 2004).

Kaplan (2004) considers that Knowledge Management systems are composed by:

a. Database and database management systems that collect and store the knowledge information;
b. Communication and management systems that retrieve and transmit the knowledge material;
c. Secure browsing that allows employees to search databases remotely.

And they are used to support knowledge generation, organization, development and distributing processes (Kaplan, et al., 2004).

To measure the effectiveness of teamwork and knowledge sharing, Kaplan et al. (2004) refer that "organizations can do better at measuring outputs, such as number of ideas transferred or adopted or number of new ideas and practices shared with other teams and organization units" (Kaplan, et al., 2004 p. 306).


### 3.3.3 Innovation processes

Ward, et al. (2006) defines "R&D/innovation" as activities associated with developing new products and services and with the improvement of processes within the organization.

"Sustaining competitive advantage requires that organizations continually innovate to create new products, services and processes" (Kaplan, et al., 2004 p. 131). This innovation capability is directly related with company's success and value proposition (Moos, et al., 2011; Kaplan, et al., 2004; IBM, 2008).

Kaplan, et al. (2004), identifies four important processes included in managing innovation:

- Identification of opportunities for new products and services;
- Managing the research and development portfolio;
- Design and development of new products and services;
- Launching new products and services in the market.

Moos, et al. (2011) recognize the importance of the organization's capacity to acquire and utilize relevant knowledge (both internal and external sources) for innovation success. Their analysis underlines the importance of Knowledge Management Systems and show

that they have significant impact on innovation success. This conclusion can also be taken from IBM's CEO study (2006) that discusses the changing face of collaboration and the ways in which the new collaboration can benefit business. True innovation is virtually impossible without collaboration and smart businesses are already looking for ways to connect with both internal and external communities (customers, partners and other stakeholders) (IBM, 2008).

According to IBM (2008), to achieve true innovation, "companies must make data available to more people in the organization; change the corporate culture to one of collaboration and trust; and implement tools to harness collective knowledge, experience and communities" (IBM, 2008 p. 3). And considering Stancich, et al. (2000), Urbach, et al. (2009), Razorfish (2008) and Forrester Research (2010) these objectives match Employee Portals functionalities.

### 3.3.4 Support processes

As said before, it's obvious that communication systems and processes play an important role in the social process of organizational change (Bharadwaj, 2000) and there's also the perception that communication and culture influence each other (White, et al., 2010).

Knowledge management support processes could also be considered in our analysis as they are supported by Knowledge Management Systems (KMS) (Alavi, et al., 2001) and they have a direct contribution to organization innovativeness (Moos, et al., 2011).

Figure 21: The importance of support processes
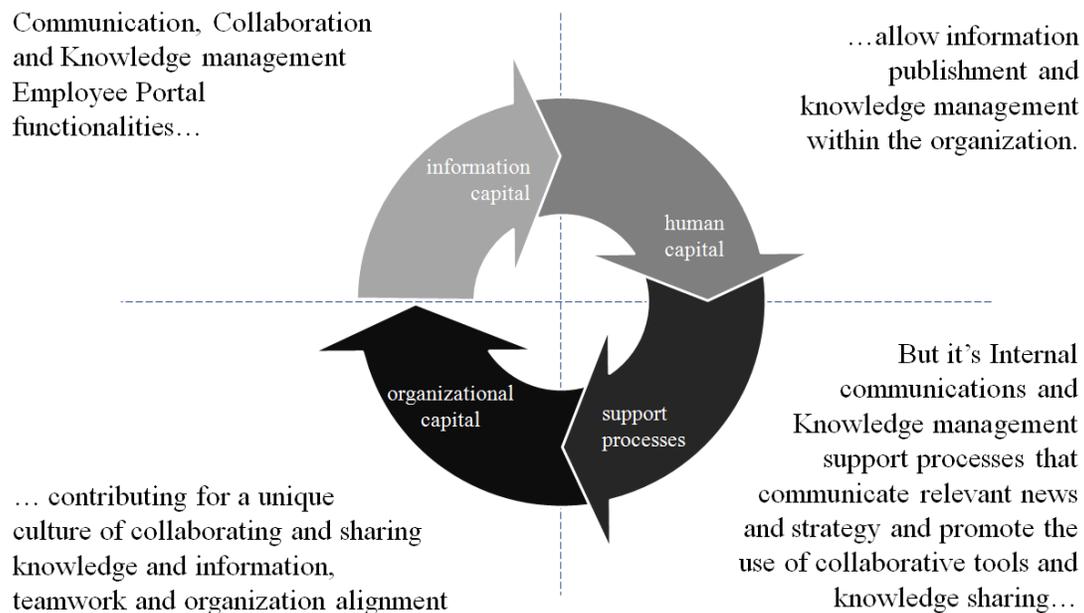
Nevertheless we focused our analysis in internal communication support processes only and tried to understand the possible relation and contribution to corporate strategy through corporate alignment **(OC2)**, culture **(OC1)** and teamwork **(OC3)**.

### 3.3.5   Correspondent enabling changes

Business changes are new ways of working to ensure that the desired benefits are realized and ICT should be considered as just one ingredient that supports or enables the delivery of the identified business objectives (Ward, et al., 2006).

To determine the changes required for the delivery of each identified benefit, and how ICT will enable them to occur, a benefits dependency network should be developed. BDN relates ICT via the business and organizational changes to the benefits identified (Ward, et al., 2006).

Ward, et al. (2006) identifies some of the more often identified enabling changes: (a) defining new working practices, (b) redesigning processes, (c) changing job roles and responsibilities, (d) implementing new incentive or performance management schemes, and (e) training in new business skills.

Employee portal projects are complex, time and cost-consuming, with a high risk of failing (Urbach, et al., 2009), (Prescient, 2009) and adequate change management and sponsorship is very important to the success of these projects and the most frequent causes of partial or total failure is the undervaluation of the organizational aspects in change (Martinia, et al., 2009).

# 4   Case Study

The case study was conducted based on corporate documentation, literature reviewing and the author experience and knowledge of the company, which allowed the development of the Benefits Dependency Network.

This BDN was then validated with major stakeholders (Corporate Communication and Innovation Management) to validate the BDN according to their different perspectives.

The author applied the collected data to the developed theoretical framework and triangulated it with employee satisfaction questionnaires data.

## 4.1   Collected data

### 4.1.1   Corporate documentation

We reviewed public and internal corporate documentation, such as Communication with shareholders, annual reports and investors' day presentations; Internal news magazines, Intranet news and Internal presentations.

### 4.1.2   Interviewed people profile

We interviewed people whose activity was related with Corporate Communication and Image Unit, responsible for the communication through the employee portal; Innovation Management, responsible for the Innovation related processes. Following is the identification of the interviewed people:

**Ana Allen Lima**, Director of Innovation Factories Management, Portugal Telecom

**Dalila Ribeiro Martins**, Head of Corporate Communication and Image, Portugal Telecom

### 4.1.3   Employee Satisfaction Questionnaires

We looked into employee satisfaction survey results (Portugal Telecom, 2002-2011) in order to triangulate and confirm the previous data gathered. These questionnaires were answered by employees of all Portugal Telecom Group companies, considering a universe of more than 11.000 employees.

The overall adherence index grows up from 42%, in 2002, to 65%, in 2005 (Seruya, 2009) and continues to grow until 86%, in 2011 (Portugal Telecom, 2002-2011).

From 2002 to 2006, the answers given are rated in the following way:

    a.   If you totally agree with the sentence, rate 9 or 10

    b. If you agree with the sentence, rate 7 or 8

    c. If you don't have an opinion on the subject, rate 5 or 6

    d. If you don't agree with the sentence, rate 3 or 4

    e. If you totally disagree with the sentence, rate 1 or 2

The final indexes were presented in a scale of 0 to 10 with one decimal place. For the case study we converted the results to a scale of 0 to 100.

Since 2008, the answers given were rated in the following way:

    a. If you totally agree with the sentence, rate 4

    b. If you agree with the sentence, rate 3

    c. If you don't agree with the sentence, rate 2

    d. If you totally disagree with the sentence, rate 1

The final indexes were presented in a scale of 0 to 100.

The organisational climate survey was reformulated throughout 2007, so there was no survey in that year.

## 4.2 Portugal Telecom strategic context

It is said that the history of Portugal Telecom (PT) is often confused with the history of Telecommunications in Portugal. Today, the largest Portuguese Private Business Entity, Portugal Telecom, has over 70 million clients spread throughout various business areas around the four corners of the world (Portugal Telecom).

This national telecommunications operator was created in 1994 with the fusion of "Telefones de Lisboa e Porto" (TLP), "Companhia Portuguesa Rádio Marconi"(CPRM) e "Teledifusora de Portugal" (TDP). PT entered a privatisation phase leaving PT's capital almost entirely in private hands but with the State maintaining a participation of 11% (Portugal Telecom).

The 21st Century started with PT as leader in the Portuguese Telecommunications market and expanding its business areas to new technologies, products, services and unthinkable solutions to pioneers in telephone and telegraphic experiences. Portugal Telecom is a company of reference in the Portuguese market and has million of clients today which are distributed among various business areas and around the four corners of the world. Fixed and mobile communications, multimedia, information systems, research and development, communications via satellite and international investments (Portugal Telecom).

This complex transformation created a "mosaic" of brands and commercial cultures: TV Cabo; Sapo; Telepac; TMN; PT Comunicações; PT Wi-Fi. Each of these brands was formed by a specific group of people, with its own organizational culture. They feel

individually responsible for the success of each of their brands and they characterize a connection with organizational reality with well defined boundaries, sometimes even physical boundaries due to the head quarters localization (Seruya, 2008).

PT group is therefore a "mosaic" of different cultures coming from the diversity of different brands with independent life and history (Seruya, 2008).

Table 6: Major Portugal Telecom brands (Seruya, 2008)

| TV Cabo | Cable TV |  |
|---|---|---|
| Sapo | ADSL Internet, contents portal |  |
| Telepac | Internet for the enterprise segment |  |
| TMN | Mobile |  |
| PT Comunicações | Wireline |  |
| PT Wi-Fi | High-speed Internet in public places |  |

By the year of 2002, six strategic and organizational challenges of the Portugal Telecom Group are more evident (Seruya, 2008): (a) the triple heritage considering its' traditional activity, fixed, still a monopoly but which will disappear in the short term and a shareholder (the state) that will reduce its stake to a golden share; (b) The process of privatization and internationalization (c) who marked its evolution, building a mosaic of activities and trademarks, (d) a mosaic of cultures (e), whose diversity is the dominant trait, and the new administration of the holding (f).

Figure 22: Strategic and organizational challenges of the PT Group (Seruya, 2008)
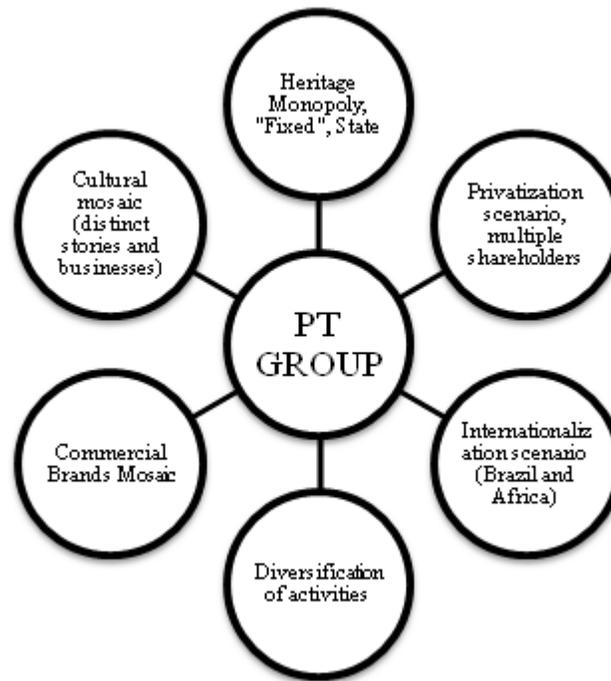


## 4.3 Cultural transformation

In 2002, the shareholders of PT Group and the new administration headed by Horta e Costa, decided to strengthen the strategic orientation towards the development of an economic group with an international dimension, based on the collaboration between activities and enterprises formerly independent (Seruya, 2008). And there are two urgent strategic approaches, consistently affirmed by this administration in all internal and external forums: focus on customers, and further internationalization.

Figure 23: The main strategic and managerial challenges of PT Group (Seruya, 2008)
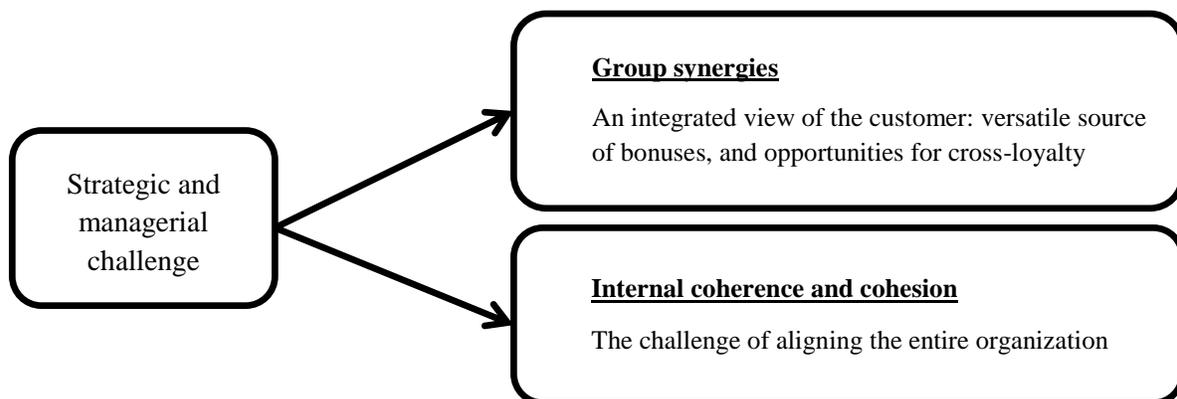
In the 2002 Portugal Telecom Investor Day, PT CEO Horta e Costa identifies "Rethinking the Group organization" and "Committing human resources to process of change" as immediate priorities needed to implement structural changes in PT (Portugal Telecom, 2002) considering the creation of shared services, an integrated perspective of the customer according to the segment and synergies among distinct businesses considering the following four orientations (Seruya, 2008):

- in network management, the Group aims to ultimately advance the implementation of operational synergies among its businesses;
- segment in the 'Personal', continue investment in mobile, which will take more and more as the primary means of offering voice services and custom data;
- in the 'Residential and SoHo' (Small offices, home offices) segment, progress towards an increased focus on the development of the integrated offer of voice, broadband and video;
- Finally, in the segment 'Enterprise', invest more in the emergence of offering integrated solutions (voice and data, fixed and mobile systems).

Figure 24: Portugal Telecom new organization (Portugal Telecom, 2003)
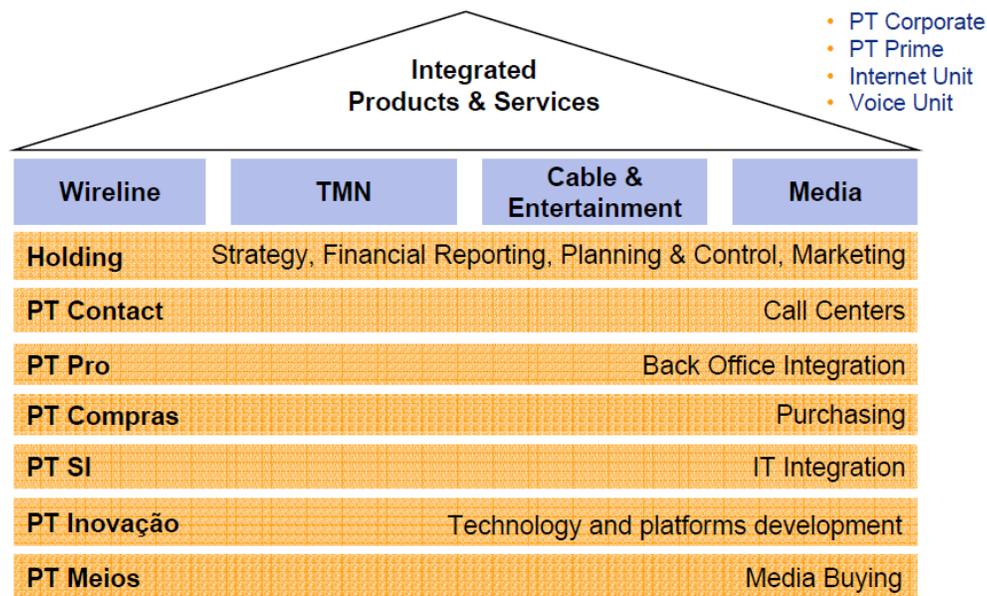


In the 2003 Portugal Telecom Investor Day, "integration" and "synergies" are watchwords and while one of the Strategic Objectives presented is "Position PT as a fully integrated provider of telecoms and multimedia" (Portugal Telecom, 2003), "One company Culture" is one of the operational initiatives presented.

Figure 25: Operational initiatives (Portugal Telecom, 2003)
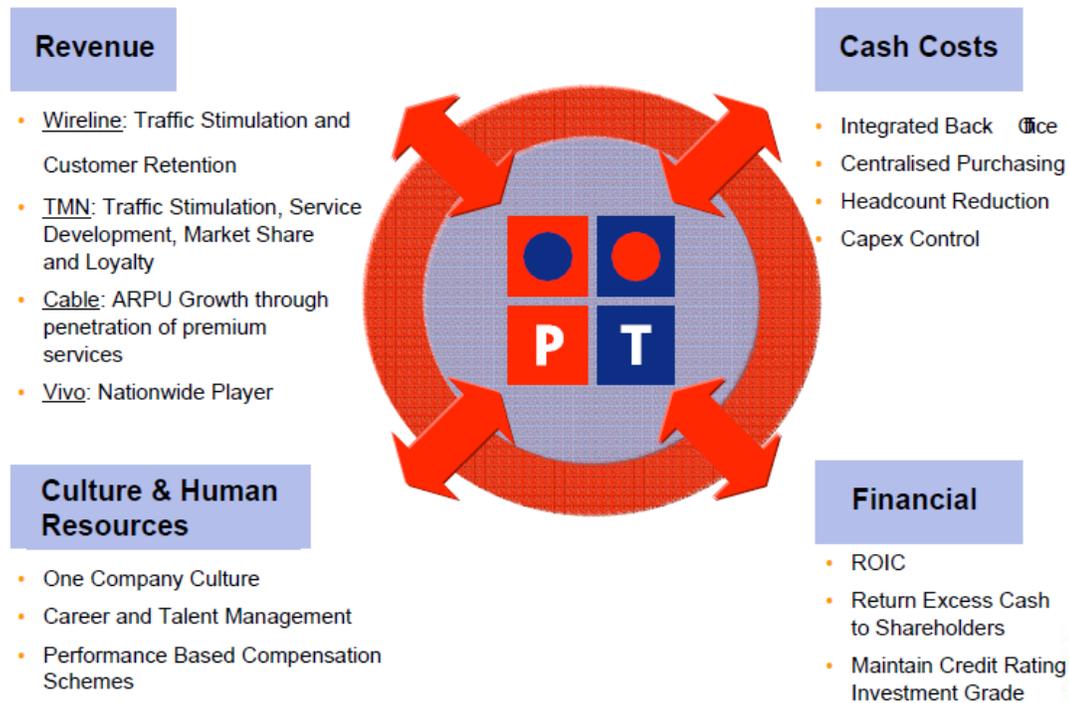


The customer orientation established as strategic by the new PT administration, demands for a new organizational culture, transversal to the group.

A new internal brand is created. éPT! is the internal corporate communication platform and celebrates PT culture. In the first editorial of éPT! magazine, Horta e Costa writes "éPT! is the brand that brings us all together" (Annex 3 – Editorial, éPT! magazine, nº 1, April-May 2003).

Kaplan and Norton (Kaplan, et al., 2004 p. 10) argue that "An organization is aligned when all employees have a commonality of purpose, a shared vision, and an understanding of how their personal roles support the overall strategy".

The Employee portal is one of the internal communication channels created to guarantee the following strategic objectives: **(a) alignment** between internal communication and corporate strategy, to **(b) promote shared culture** within the group and to **(c)** promote a **fluid communication** allowing the **integration** and **exploitation of synergies** between companies and employees of PT (Martins, 2002).

## 4.4 Employee Portal

Considering the strategic objectives of **alignment** between internal communication and corporate strategy, **promotion of shared culture** and promotion of **fluid communication** to **exploit synergies** between companies and employees, we focused our analysis mainly in Corporate Communications and Collaboration functionalities.

For the current analysis we considered that the following areas and sites are part of the **Employee Portal**:

- **Corporate Intranet** (formerly named inSapo and then éPT!) – acts as the entry gate for all employees in PT Group and considers functionalities of corporate communications and applications and tools;
- **éPT! card** – this site considers presenting the portfolio of products and services that integrate corporate benefits package to PT employees and order entry of submitted orders;
- **éPT! Teams** – this site considers collaboration functionalities;
- **Self service employee portal** – this site guarantees the access to HR approval processes (such as vacations, expenses, training), accessing salary payment details and updating personal information;
- **Sábio** – Knowledge Management and collaboration functionalities, gives access to market information, business and technology reports and trends;
- **OPEN website** – collaboration site for employees to share ideas, supports innovation processes. It also considers OPEN star recognition system and OPEN awards annual project championship.

Figure 26: Complimentary employee portal functionalities (Forrester Research, 2008)
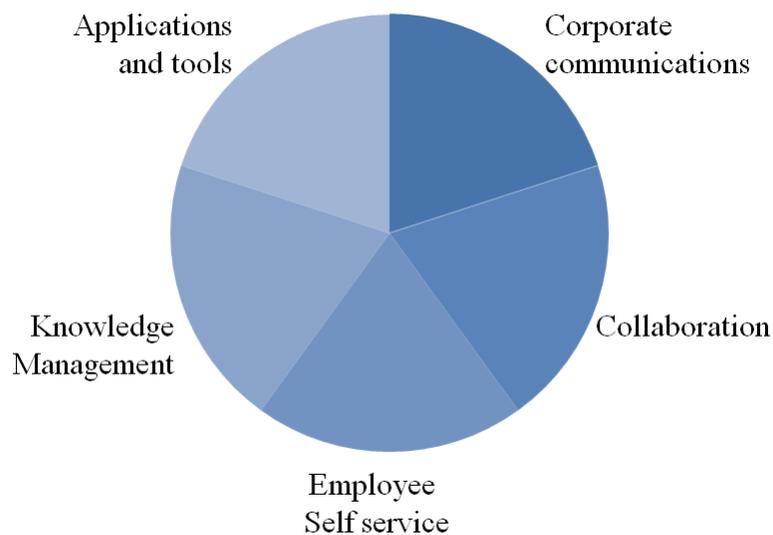
The distinct areas of the Employee Portal were progressively implemented over a period of eight years. This process started in 2003 with the creation of a corporate intranet that acted as the entry point to all employees keeping other intranets and ended with the phase out of all company intranets in 2011. With this the corporate employee portal became the only touching point with all employees.

Dalila Ribeiro Martins agrees that in 2002/2003 there was no corporate culture. There were distinct companies with distinct management teams and, in some cases, with concurrent products and services. There were almost no corporate synergies. PT had around thirteen thousand people, each one focused on his/her own job.

Corporate Communication Unit was created in the end of 2002 with the objective of creating a common communication orientation and unique communication and éPT! brand is born in April of 2003 to prepare the following business changes.

éPT! Emploee Portal started his course with corporate communication: with it there's only one channel to communicate relevant issues of PT to all employees, no matter the company.

In the following years, tools and services of each company are integrated within éPT! and specific company communication functionalities are discontinued. éPT! assumes itself as the only communication channel. And, latter  it assumes the role of culture aggregator of innovation, volunteering, sustainability, employee benefits, internal mobility and recognition programs (like OPEN star or OPEN awards).

For Dalila Ribeiro Martins there's still a way to go and PT has now a new challenge with the merger between PT and OI (two different companies with very different cultures).


Dalila Ribeiro Martins identified éPT! card as an essential tool to promote culture. This initiative enabled the creation fo corporate benefits policies equal to all PT employees, despite their company. As a result a PTC or a TMN employee could access the group products and services in the same conditions. According to Dalila Ribeiro Martins, the launch of the éPT! card was the first time that PT employee felt as a group.

In the next figure we present the timeline of the most relevant employee portal implemented projects. Due to the role played in PT Group, the author was involved in most of the identified projects - as project manager in some of them.

Figure 27: Timeline of employee portal implemented projects
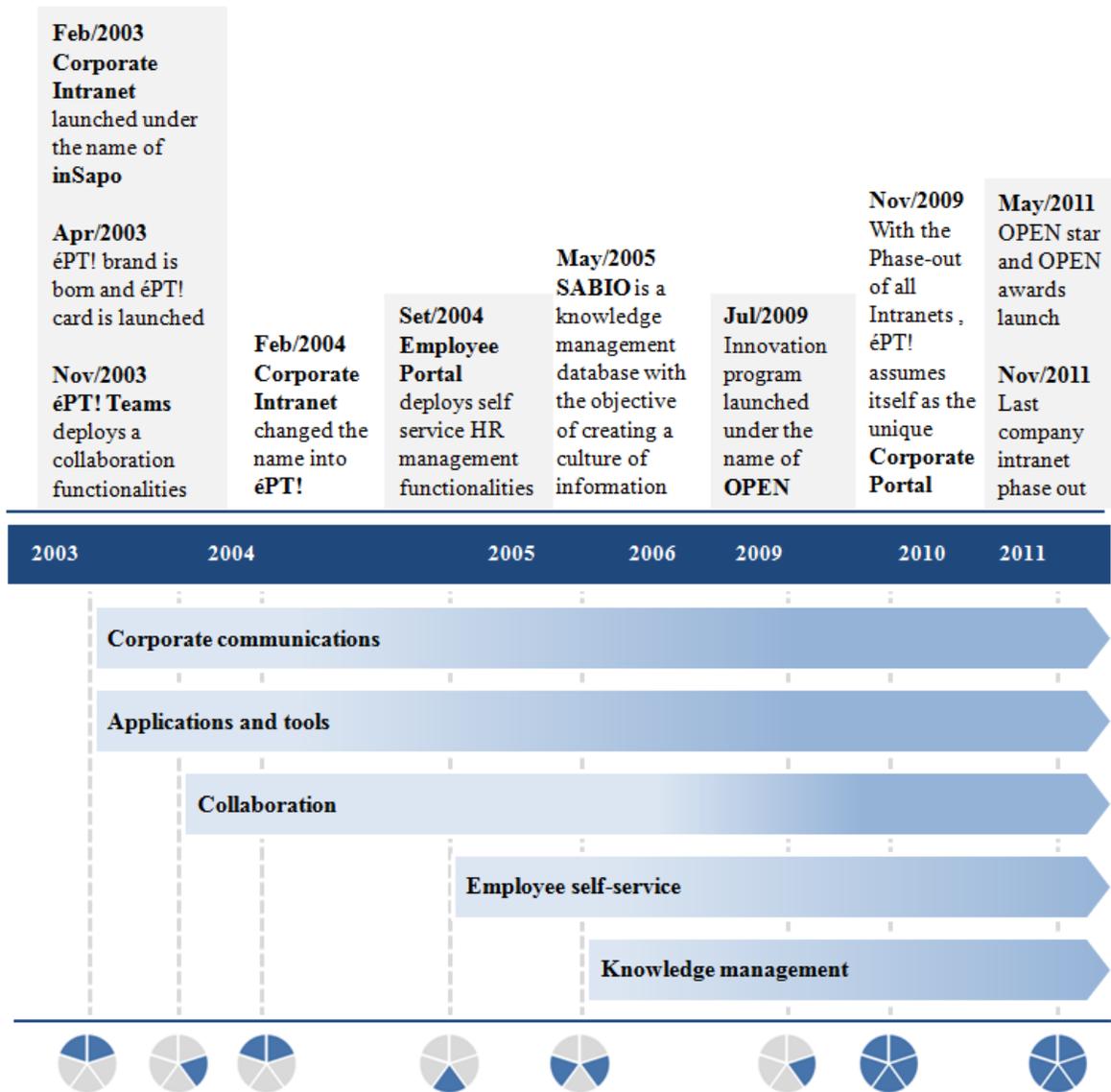


Careful analysis to the Portugal Telecom Employee Portal timeline lead to understand that its' functionality evolution is somehow aligned with the various stages of Razorfish Framework but there's no perfect match because previous company Intranets were older than Corporate Intranet and had their own path of evolution. Analysis of Corporate Intranet against maturity frameworks should take into consideration all Intranets and Corporate Intranet in an integrated viewpoint.

## 4.5   Considered period

Benefits monitoring is a long cycle, it starts with benefits planning, flows over a period of time as people learn to use the new technology and systems and integrate it into business processes and ends with the benefits realization (Bartlett, 2006), (Gartner, 2013).

Figure 28: Benefits dilution from planned benefits to realisation (Bartlett, 2006)
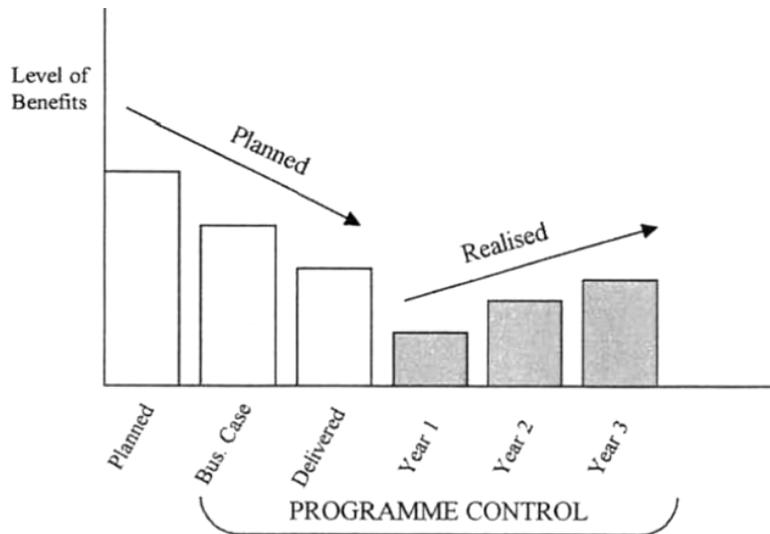


Ward, et al. (2006) argues that benefits review should be held as soon as possible after implementation, to assess (with sufficient evidence) if the planed benefits have been achieved. However some benefits don't occur as planned (Gartner, 2013) others depend on the usage of the new implemented capabilities (Ward, et al., 2006) and, therefore, organizations might need more time to evaluate them adequately.

Transformational efforts often fail because organizations declare success too soon. According to Kotter (1995), "until changes sink deeply into a company's culture, a process can take 5 to 10 years, new approaches are fragile and subject to regression".

To show people how the new approaches, behaviours and attitudes improve performance, communication is essential. And another frequent mistake is the lack of anchoring changes into the corporation's culture. It's essential to integrate new behaviours into corporate culture, which takes time (Leading Change: Why transformational Efforts Fail, 1995).

Because certain benefits take time to reveal themselves in particular when corporate culture is involved, we considered in our analysis the nine year period containing these projects, starting in 2002 (before the first project) and ending in 2011 (after the last intranet phase-out). We focused in the full period when analysing alignment and teamwork but we will focus in the last years when analysing culture.

"Innovation has always been a characteristic of PT, but the company's cultural transformation and change in mentality over the past few years has underlined its importance. The existing innovation management methodology, part of the OPEN Programme, promotes a culture of innovation across the whole company, maximising employees' potential for creativity and innovation" (Portugal Telecom, 2012 p. 64).

## 4.6   Benefits Dependency Network

The development of the Benefits Dependency Network varies, depending on whether a problem-based or innovation-based investment is being considered. Whether the case, its development "not only enables the knowledge and experience of business managers to be applied more coherently to planning the investment, but it also creates a clearer understanding of how different groups need to work together to achieve the benefits they and the organization wish to gain" (Peppard, et al., 2007 p. 20) and of the changes needed to deliver those benefits.

According to Ward, et al. (2006), while constructing the network for problem-based investments it is first necessary to define with precision the improvement targets that can be achieved if the problems or constraints are removed. These form the objectives for the investment. The benefits that achieving the objectives will deliver are also identified. Current processes and ways of working are then analyzed to identify possible combinations of business changes and IT functionality that could deliver the benefits. The objectives and benefits are then finalized for the preferred option. With this information a full business case will be developed, by quantifying the expected levels of improvement and their financial values (Ward, et al., 2006).

Figure 29: BDN construction for problem-based investments (Peppard, et al., 2007)
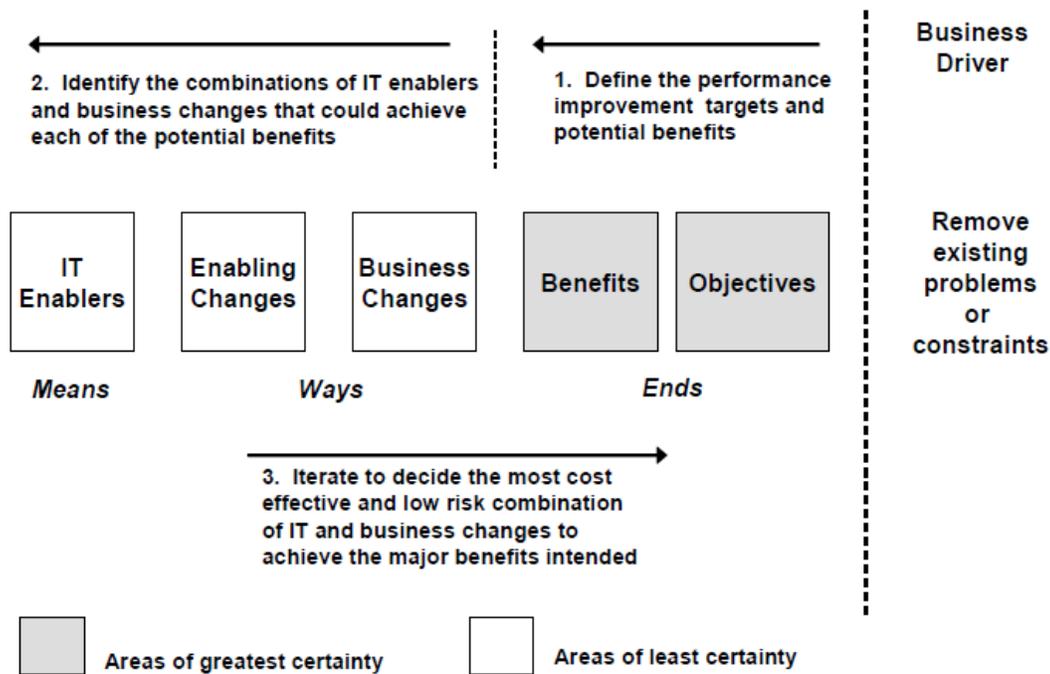


We found plenty of evidences in the reviewed documentation that the employee portal was a tool to guarantee the accomplishment of strategic objectives related with culture and alignment (Annex 3 – Editorial, éPT! magazine, nº 1, April-May 2003; Annex 5 – Launching Employee Portal inSapo in 2003; Annex 6 – éPT! first anniversary; Annex 8 – Unique corporate intranet; Annex 9 – Timeline of Employee Portal related projects, until 2010; Annex 10 – Ninth anniversary of the corporate intranet; Martins, 2002). Therefore we considered that the problem-based approach was the adequate one to this kind of project.

To develop the hypothetical BDN we started by (1) analysing the business drivers to (2) determine the investment objectives, (3) identifying the benefits that would be the consequence of the employee portal implementation and the (4) business changes needed to operate in the organization, the (5) enabling changes and (6) finally the enablers, which in this case are the functional areas of the employee portal.

The BDN was reviewed by the interviewed people to validate the linkages between the various components and to identify other components that are relevant but weren't so obvious in the evidences gathered.

A complete network should contain the full set of benefits, all linked to one of the primary objective(s), in cause-and-effect relationships, however sometimes it is helpful to have a separate Benefits Map for each primary objective (Bradley, 2006).

### 4.6.1 Building the Benefits Dependency Network

### 4.6.1.1 Business Drivers

Benefits management starts with the identification and understanding of the strategic influences or forces acting on the organization, which require the organization to make changes either to what it does or to how it conducts its business activities (Ward, et al., 2006).

Business Drivers match the senior managements' perspective of the organization and reflect the important things to the business and business changes that should take place (Ward, et al., 2006).

In Table 12 we identified the relevant business drivers that influence the organization (Annex 24 – Benefits Dependency Network data).

### 4.6.1.2 Investment Objectives

"Investment objectives should be a set of statements that define the 'finish line' for the project, or paint a picture of the way things will be if the project is successful. Success criteria are therefore often included in the statement of the objective. **However, these tend to be high level statements, rather than detailed operational measures**." (Ward, et al., 2006 p. 128).

It is important that each of the investment objectives explicitly addresses one or more of the drivers, to ensure that the project will clearly contribute to achieving changes that are important to the organization's future (Ward, et al., 2006 p. 128). In Table 13 we identified the theoretical investment objectives (Annex 24 – Benefits Dependency Network data).

### 4.6.1.3 Business benefits

Business benefits are "an advantage on behalf of a particular stakeholder or group of stakeholders" (Ward, et al., 2006 p. 107). Business Benefits linkage with Business Objectives identification is made through Benefits Dependency Network.

Once all the analysed employee portal projects are finished, we didn't execute workshops with the main stakeholders to develop the BDN. Instead and for academic purposes only, the benefits identification was made through literature review of corporate documents and Seruya's book and report about his thesis "éPT! A marca interna da Portugal Telecom". The connections between business objectives, benefits and business changes are identified in Table 15 (Annex 24 – Benefits Dependency Network data) and were subject of validation by the interviewed people.

### 4.6.1.4 Business Changes

Business Changes are "The new ways of working that are required to ensure that the desired benefits are realized" (Ward, et al., 2006 p. 109).

In his thesis about Portugal Telecom internal éPT! brand, Seruya (2008) identifies a collection of new organizational practices within the Group after 2002:

a) Governance model;
b) Model of Individual Performance evaluation;
c) Employee satisfaction questionnaires;
d) Information Systems unification;
e) Shared Services;
f) Employees shareholders;
g) Executive meetings;
h) Internal mobility;
i) Integrated services selling (organize PT by customer segments);
j) Creation of Central Office of Communications.

In our analysis we focused only in those which are more obviously related with the employee portal. We identify the relevant Business changes in Table 16 (Annex 24 – Benefits Dependency Network data) and they were subject of validation by the interviewed people.

When validating the developed BDN based on corporate information, Ana Allen Lima identified the promotion of a "culture of recognition" as a relevant business change operated within PT (C8) and the creation of the Innovation Management Unit in 2009 (C9).

In the interview, Ana Allen Lima, identified other business changes but we didn't include them in the BDN because they're not related with the ICT enablers. Some of these business changesare: (i) the nomination of OPEN team members that work as a depth-gauge inside the business units and supporting change management and promoting sharing and innovation culture; (ii) working together with product management teams and segments in order to help defining segment offering and products roadmap; (iii) producing thematic workshops named "What's next" with the objective of discussing topics related with PT offering, creating awareness and promoting portfolio progress.

Dalila Ribeiro Martins identifies also some additional business changes that were not implemented due to ICT projects: (i) the creation of transversal business units; (ii) the realization of unique Christmas party; (iii) the standardization of employee children Christmas gifts and parties; (iv) the implementation of single career model; (v) trainees and academia programs.

In all of these business changes, the employee portal played a relevant role of communicating change and keeping people informed.

Dalila Ribeiro Martins identified éPT! card project as a relevant area in the Corporate Intranet with the objective of promoting equal benefits to all PT employees and therefore we added Enabling Change C10 in the BDN.

### 4.6.1.5  Enabling changes

Changes that are prerequisites for achieving the business changes or that are essential to bring the system into effective operation within the organization (Ward, et al., 2006 p. 109).

The described enabling changes presented in Table 17 (Annex 24 – Benefits Dependency Network data) were retrieved from corporate literature, reviewed and confirmed in the interviews.

There were other relevant projects but we didn't consider them in the scope of analysis as they're not directly related with employee portal. We draw attention to each of the IS/IT unification project (PT webization program, CRM unification project, SAP unification project, etc.) and the performance evaluation system, for example.

When validating the developed BDN, Ana Allen Lima identified the OPEN star and OPEN awards as important initiatives to human capital recognition. These two initiatives are supported on the Employee Portal and the respective projects were implemented in May of 2011. OPEN star consists on recognizing great performances and distinctive behaviours through the credit of a star badge and OPEN awards consists on an annual championship between the relevant projects implemented in the ending year. These projects are submitted by the teams that worked on them and are voted by all employees.

We considered these functionalities are contained by OPEN platform and we added an enabling change to the BDN (E8 – implement OPEN star and OPEN awards project).

Dalila Ribeiro Martins identified éPT! card project as a relevant milestone in the life of the Employee Portal and therefore we identified the implementation project in the BDN as Enabling Change E9.

### 4.6.1.6  ICT Enablers

Enablers are "the information systems and technology required to support the realization of identified benefits and to allow the necessary changes to be undertaken" (Ward, et al., 2006 p. 136).

They are described in Table 18 (Annex 24 – Benefits Dependency Network data) and they were subject of validation by the interviewed people.

We identified several relevant ICT enablers and correspondent implementation projects (enabling changes) in the analysed period – among them "Flat TV screens", "SMS / MMS", "InfoMail", "Performance Evaluation System", "Unified HR System", "Corporate AD and Network", "Messaging and communication tool" and "Unified CRM" – however we focused only on employee portal functionalities (i) corporate communications, (ii) access to applications and tools, (iii) collaboration, (iv) self service and (v) knowledge management.

Dalila Ribeiro Martins identified éPT! card website as a relevant enabler to promote corporate culture. We reflected this website in the BDN as ICT Enabler E6.

## 4.6.2   Benefits Dependency Network

Figure 30: Developed BDN
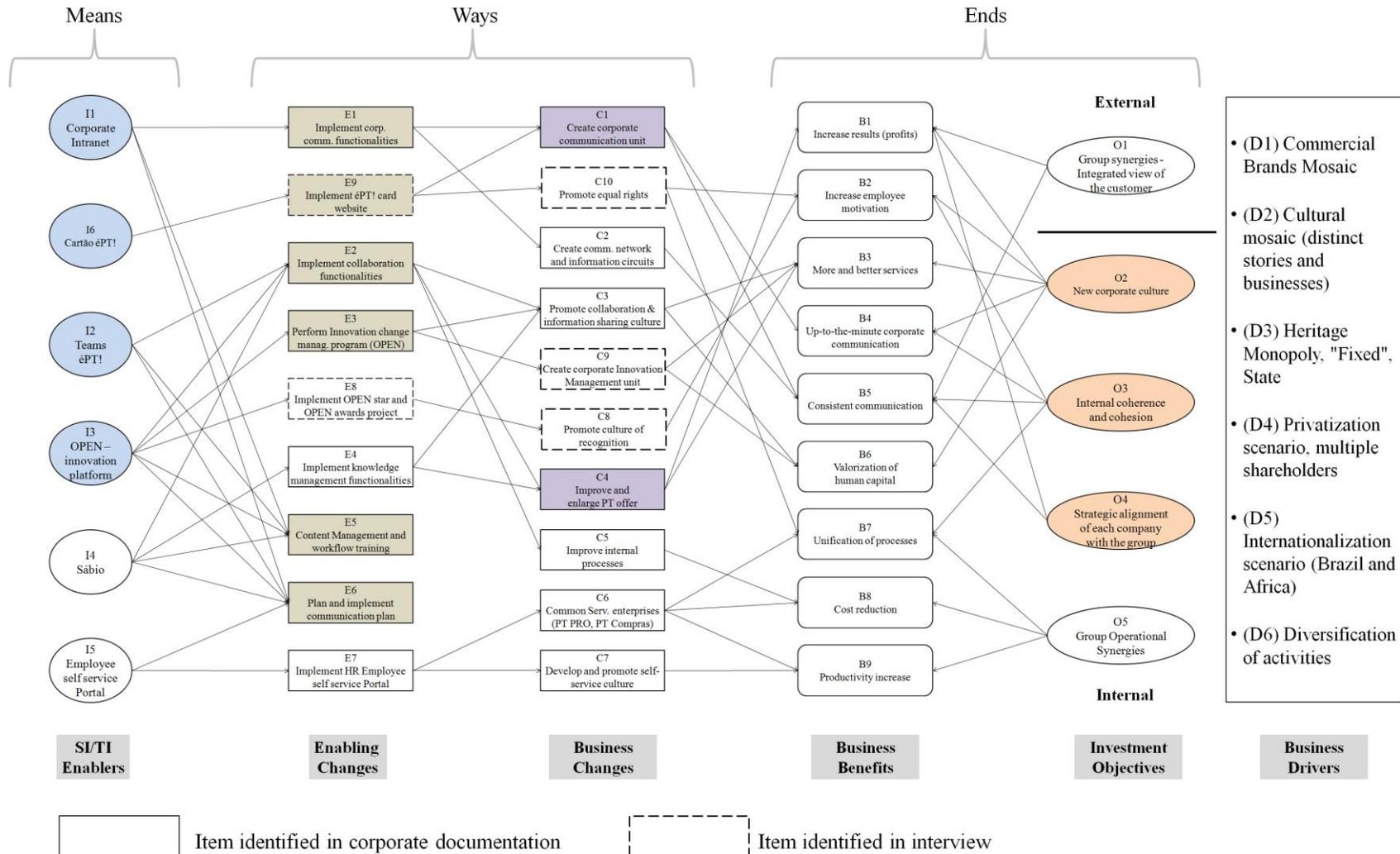
## 4.7   Framework

We used the data gathered in the BDN to load in the framework. In the internal perspective we've chosen two identified Business Changes (one related with innovation: C4; and the other related with communication support processes: C1).

The framework Enabling Changes layer was loaded with the Enabling Changes layer of the BDN. Strategy Map Information Capital matches the ICT enablers of BDN and Strategy Map Organizational Capital matches (internal) investment objectives of BDN. The fluxes were identified from the BDN and from the performed interviews.

Figure 31: Framework linkage evidences
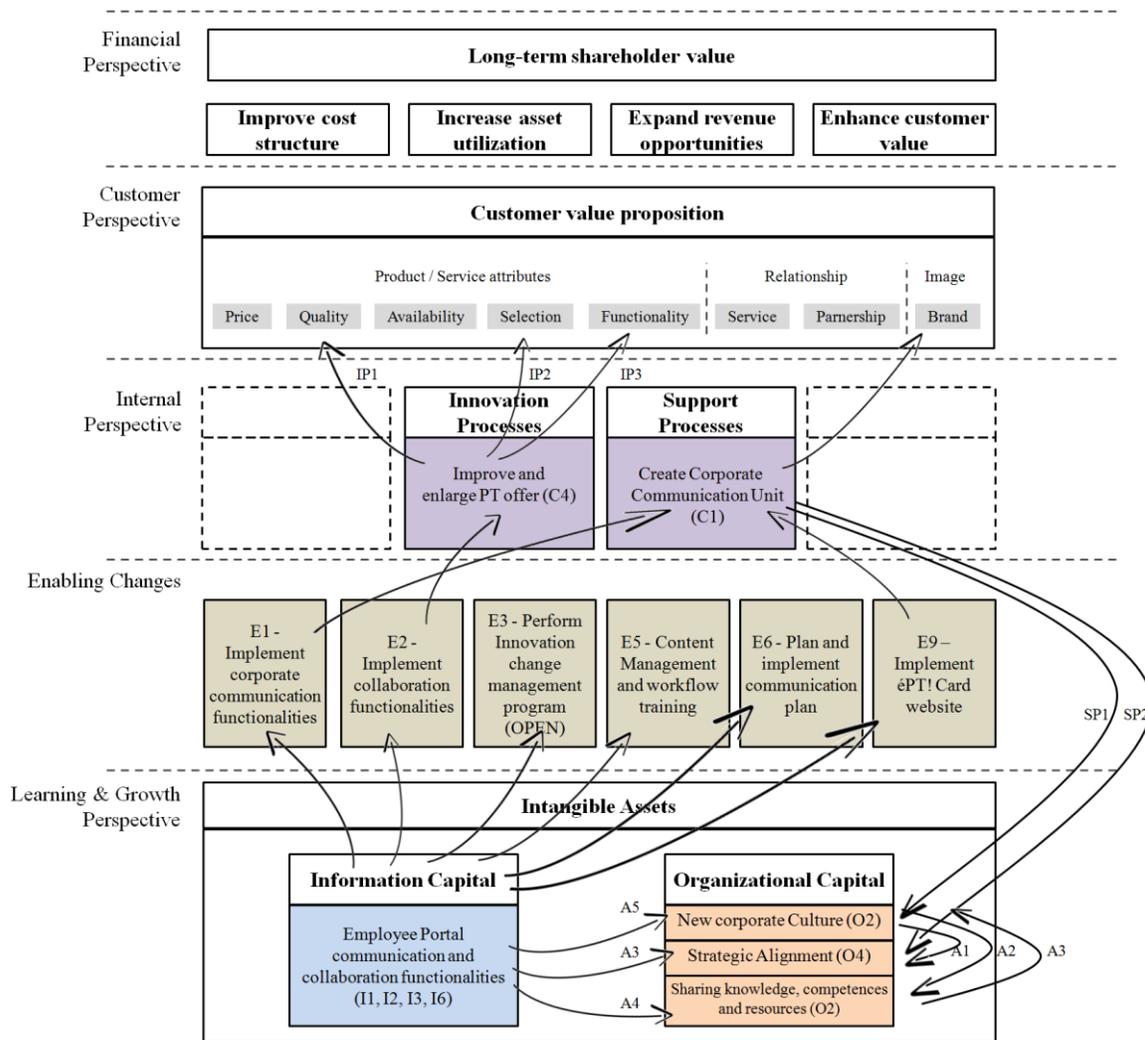
### 4.7.1 Learning & Growth Perspective

To build the framework we focused only on two main objectives: new corporate culture (O2) and strategic alignment of each company with the group (O4). These Objectives map with organizational capital intangible assets **Culture (OC1)**, **Alignment (OC2)**.

The article "New Objectives, New Attitude" on éPT! magazine (number 5, 2004) explains the strategic guidelines to realize the challenge of having "a single PT". This new corporate culture consists of (Annex 13 – éPT! magazine, nº 5, 2004):

a) Developing a culture of information sharing;
b) Creating a culture of accountability;
c) Creativity and innovation;
d) Team spirit;
e) Customer orientation.

Therefore we considered that the identified Business Objective in the BDN "**new corporate culture (O4)"** includes "team spirit" and "information sharing" that matches organizational capital intangible asset **Teamwork and Knowledge Sharing (OC3)**, in the framework. The Business Change identified as C3 (Promote collaboration & information sharing culture) in the BDN also highlights the importance of this organizational capital intangible asset.

We considered Employee Portal communication and collaboration areas and functionalities as the **Information capital (IC1)** analyzed.

According to Ana Allen Lima's viewpoint, corporate culture helps alignment and teamwork and the employee portal works as a vehicle to alignment through information and to teamwork through collaborative functionalities (see links A1, A2, A3 and A4 in Figure 31).

Dalila Ribeiro Martins agrees that "the development of a corporate culture is essential to promote collaboration" because one only shares something with other if both have something in common (see link A2 in Figure 31).

#### 4.7.1.1 Corporate Culture

According to Kaplan et al. (2004) measurement of culture should be based on employee surveys. As said before, we wanted to find evidences on culture linkage to other organization capital and the contribution of Employee Portal and related support processes. éPT! Employee Portal is part of the strategy to change corporate culture (Seruya, 2009 p. 7) but integrating new behaviours into corporate culture takes time (Leading Change: Why transformational Efforts Fail, 1995) therefore we must analyse the last few years which is when the company's cultural transformation and change in mentality took place (Portugal Telecom, 2012).

The main Employee Portal events in this period were (i) the launching of the innovation program "OPEN" in 2009, (ii) the phase-out of all company intranets and consequent settlement of éPT! as the unique employee portal, which took place between 2009 and 2011 and (iii) OPEN star and OPEN awards project which took place in 2011.

Table 7: Corporate culture related indicators (Portugal Telecom, 2002-2011)

| Indicator analysed | First year considered | Last year considered | increase (+) or decrease (-) [2] |
|---|---|---|---|
| There is a common culture shared by the entire organization | 2008 | 2011 | +17 |
| I identify myself with corporate culture | 2008 | 2011 | +11 |
| I identify myself with PT external institutional image | 2008 | 2011 | +10 |
| I'm proud to work in PT Group | 2002 | 2011 | +11 |

The increase of these indicators alongside the successive employee portal phases is consistent with the literature that refers to Corporate Communication as an essential tool to perform adequate change when implementing Corporate Culture and the influence that communication has on culture and vice-versa (White, et al., 2010) (see links A5 and SP1 in Figure 31). This data is also relevant in the benefits monitoring once evidences the achievement of one of the business objectives.

Speaking about corporate culture and the importance of distinct aspects to promote it, Dalila Ribeiro Martins highlights the importance of having common processes because it enables common experiences and the existence of a dedicated team to manage corporate communication because it's a way to empower the team giving also clear signs to the organization on the importance of internal communication (see link SP1 in Figure 31). Employee portal functionalities allow the execution of the plan and information quality is essential but is only relevant when the other aspects are covered.

Dalila Ribeiro Martins also says that the employee portal had an integrator and opinion maker role towards the creation of a unique corporate culture (see link A5 in Figure 31). It started by gathering and providing a common ground and later integrated and replaced sub-cultures. Today the employee portal is the official source of information and corporate PT culture.

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[2] Considering a scale of 0 to 100

We found plenty of evidences in the reviewed documentation (Annex 3 – Editorial, éPT! magazine, nº 1, April-May 2003; Annex 5 – Launching Employee Portal inSapo in 2003; Annex 6 – éPT! first anniversary; Annex 8 – Unique corporate intranet; Annex 9 – Timeline of Employee Portal related projects, until 2010; Annex 10 – Ninth anniversary of the corporate intranet; Martins, 2002) that the employee portal was a tool to enable the creation of corporate culture (see link A5 in Figure 31).

The indicator "There is a common culture shared by the entire organization" was the one with the greatest increase which is consistent with the settlement in 2011 of éPT! as the unique employee portal.

In another evaluated indicator in 2004 and 2005, PT employees strongly believe that "The internal communication media (Intranet, Newsletters, news Magazine, SMS, plasma TV, Infomail and posters) contribute to the creation of a culture of Group". This indicator has an evaluation above 75% and Intranet is identified as the more relevant tool of the internal communication tools used. This shows that employees also see the employee portal as a tool to "promote shared culture within the group" (Martins, 2002) (see link A5 in Figure 31).

For Ana Allen Lima, the employee portal gave a great contribution to a general feeling of belonging that didn't exist before. Dalila Ribeiro Martins, highlights the importance of ePT! card promoting an equity culture of common benefits to all employees (see link A5 in Figure 31).

Table 8: Level of relevance to perform activities in 2005 (Portugal Telecom, 2002-2011)

| Tools to perform activities | Level of relevance [3] |
|---|---|
| Intranet | 8,0 |
| e-mail communications | 7,3 |
| Infomail (press clipping) | 6,7 |
| Newsletters | 5,9 |
| Magazine | 5,7 |
| sms communications | 5,4 |

[3] Level of relevance: 1 - low relevance; 10 - high relevance

### 4.7.1.2  Alignment

Company Intranets are among the mechanisms of communication programs to create strategic awareness and to measure if employees are aware of high-level strategic objectives, organizations should use employee surveys (Kaplan, et al., 2004).

Alignment requires that all employees are empowered in the same direction. Leaders must create awareness of the high-level strategic objectives and then they must ensure that individuals and teams have local objectives and rewards that contribute to achieving targets for high-level strategic objectives (Kaplan, et al., 2004).

Most leaders will agree, the degree by which their vision is communicated effectively to each member of the organization in order that their contribution is aligned with the financial outcomes determines the success of that organization and this process of strategy alignment requires the creation of a "strategic culture" which is often the primary function of strategy alignment initiatives (Estes, 2007). For Dalila Ribeiro Martins, corporate culture is essential to promote alignment (see link A1 in Figure 31).

Table 9: Alignment related indicators (Portugal Telecom, 2002-2011)

| Indicator analysed | First year considered | Last year considered | Growth (+) or Reduction (-) [4] |
|---|---|---|---|
| There is a good communication between the company and its employees | 2002 | 2005 | +5 |
| Management discusses and disseminates polices and business objectives | 2002 | 2005 | +6 |
| Business strategies are published in an understandable way with employees | 2002 | 2006 | +8 |
| My company informs me of the relevant business events before any other source | 2002 | 2005 | +9 |
| My company informs me of the relevant business events before any other source | 2005 | 2011 | +19 |
| I know PT strategy | 2008 | 2011 | +11 |
| My team knows what is their contribution to achieving PT strategic objectives | 2002 | 2005 | +1 |
| Acknowledgement of my contribution to the achievement of PT strategic objectives | 2005 | 2011 | +6 |

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[4] Considering a scale of 0 to 100

In another evaluated indicator in 2004 and 2005, PT employees strongly believe (with an evaluation above 70%) that "The topics covered in the internal communication media promote inner values and objectives of the Group". In 2011 employees recognize that "through various media's corporate (intranet; clipping, email, sms, etc.), they have timely and useful information about PT" and they rate it over 80% (Portugal Telecom, 2002-2011) (see links A3 and SP2 in Figure 31).

We believe that the general increase of all alignment related indicators (see table above), aligned with the implementation of employee portal communication functionalities (in 2003) and the settlement of éPT! as unique intranet (in 2011) are strong evidences that the employee portal can be seen as a tool to promote "alignment between internal communication and corporate strategy" (Martins, 2002) (see link A3 in Figure 31).

For Dalila Ribeiro Martins the employee portal had an important role towards the creation of corporate alignment (see link A3 in Figure 31). The employee portal impersonated "the voice in command", aggregated functionalities to enable employees to recognize corporate objectives and understand the structure of the group and enabled teams to know each other enabling teamwork. Today éPT! is the official internal spokesperson of the group. It has all relevant corporate information, tools and services and aggregates common corporate policies and guidelines. éPT! has became so essential to all employees that the phase-out of company intranets happened softly and with almost no impact in business activities.

When speaking about "alignment", Dalila Ribeiro Martins, underlines that corporate culture is as essential to enable alignment as corporate initiatives and cascade communication (see links A3 and SP2 in Figure 31).

### 4.7.1.3 Teamwork and knowledge sharing

Companies must generate, organize, develop and distribute knowledge (either through a "push system" or by providing easy access when people are searching information relevant to their immediate needs). And there's no greater waste than a good idea used only once (Kaplan, et al., 2004).

To measure the effectiveness of teamwork and knowledge sharing, Kaplan et al. (2004) affirm that "organizations can do better at measuring outputs, such as number of ideas transferred or adopted or number of new ideas and practices shared with other teams and organization units" (Kaplan, et al., 2004 p. 306). And Portugal Telecom OPEN innovation platform registered more than 9 thousand ideas between 2009 and 2012).

Speaking about teamwork and the importance of the distinct aspects to promote it, Ana Allen Lima recognizes commitment and sponsorship of top management as essential aspects to promote collaboration (creating a culture of sharing) and therefore communicating it to employees is of major relevance (see link SP1 in Figure 31). If there's

not a sharing culture there's no relevance in implementing innovation processes and procedures (see links A2 in Figure 31).

Considering the relevance of interrelationship between different organization units of the company and the mechanisms for knowledge distribution, we analysed the following indicators that were evaluated by employees under the Employee Satisfaction Questionnaires performed between 2002 and 2011.

Table 10: Teamwork related indicators (Portugal Telecom, 2002-2011)

| Indicator analysed | First year considered | Last year considered | increase (+) or decrease (-) [5] |
|---|---|---|---|
| There is a good functional interrelationship between different areas of the company where I work | 2002 | 2005 | +7 |
| I can rely on the cooperation and involvement of other directions with whom I interact | 2008 | 2011 | +5 |
| I am able to get the information I need to perform my job well | 2002 | 2005 | +4 |
| I am able to get the information I need to perform my job well | 2005 | 2011 | +11 |

The increasing of the climate of cooperation and good functional interrelationship can be related with éPT! Teams project implementation and other collaboration functionalities (see link A4 in Figure 31). We can read in the article published in éPT! magazine that the objectives surrounding this new area consider promoting interrelationship between companies, teams and employees, with the final goal of promoting group culture (Annex 12 – Launching Equipas éPT!, éPT! magazine nº 4 – Christmas special, 2003) (see links A4 and A6 in Figure 31).

Ana Allen Lima argues that before éPT!, there was lack of knowledge on each units' responsibilities and performed activities. Now everyone knows what each other do.

About getting the information needed to perform well each employee's job, the increase in the evaluated indicator is consistent with the creation of the employee portal (in 2003) and latter on with the launch of Sabio (in 2005) and the phase-out of other company intranets (see links A4 in Figure 31).

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[5] Considering a scale of 0 to 100

### 4.7.2 Enabling Changes

The Enabling Changes tier of the framework was mapped with the identified enabling changes in BDN, which are related with the selected communication and collaboration Employee Portal areas and functionalities:

a) E1 - Implement corporate communication functionalities
b) E2 - Implement collaboration functionalities
c) E3 - Perform Innovation change management program (OPEN)
d) E5 - Content Management training
e) E6 - Plan and implement communication plan

We found plenty of evidences in the reviewed corporate documentation (Annex 3 – Editorial, éPT! magazine, nº 1, April-May 2003; Annex 5 – Launching Employee Portal inSapo in 2003; Annex 12 – Launching Equipas éPT!, éPT! magazine nº 4 – Christmas special, 2003; Annex 14 – Visão magazine, 29th January, 2004; Annex 20 – Article about the launch of OPEN, éPT! news, 2009) about the involvement of top management commitment and sponsorship on employee portal implementation. Ana Allen Lima also identified some initiatives to manage change, namely OPEN training, identified in BDN and the appointment of OPEN team members and Dalila Martins highlights the importance of managing change and empowerment of internal communication team.

### 4.7.3 Internal perspective

The Internal Perspective tier of the framework considers the Business Changes identified in the BDN that match the selected processes:

a) **Identification of opportunities** for new products and services innovation process **(IP1):** C4 - Improve and enlarge PT offer;
b) **Internal communication support process (SP1):** C1 – Create Corporate Communication Unit with all inherent communication processes and procedures.

#### 4.7.3.1 Innovation Processes

True innovation is virtually impossible without collaboration and to achieve it, "companies must make data available to more people in the organization; change the corporate culture to one of collaboration and trust; and implement tools to harness collective knowledge, experience and communities" (IBM, 2008 p. 3). Some of these are functionalities made available by employee portal. In the analysed period the main employee portal events were the launching of éPT! Teams in November of 2003 and the innovation program "OPEN" in July of 2009.

In 2005, PT introduces a new group of indicators related with Innovation. This block had an excellent debut demonstrating the recognition of employees that their companies are - in

fact - encouraging the use of creativity to innovate and customer satisfaction (Portugal Telecom, 2002-2011). Ana Allen Lima refers that the OPEN program showed the company dynamic, once evidences the motivation of employees who want to contribute to improve processes, products and services. And it's very exciting to see how the ideas market auto regulates due to a sort of "company collective conscience" present in employees.

In 2008 the indicator "PT invests in developing innovative products and services" is introduced in the corporate employee satisfaction questionnaire. And from this year until 2011, this indicator had an increase of 16 points in the employee appraisal.

This increase together with the innovation program "OPEN", released in 2009 is consistent with the literature that refers to use of collaboration practices as the starting point to create innovative processes, products or services IBM (2008). This is also evidenced in Ana Allen Lima interview.

Once the development of a corporate culture is essential to promote collaboration, sharing knowledge and innovation (Marr, et al., 2004), we might be witnessing a cause-effect of the change performed in corporate culture. This is also evidenced in Ana Allen Lima and Dalila Ribeiro Martins' interviews.

Table 11: Innovation related indicator (Portugal Telecom, 2002-2011)

| Indicator analysed | First year considered | Last year considered | increase (+) or decrease (-) [6] |
|---|---|---|---|
| PT invests in developing innovative products and services | 2008 | 2011 | +16 |

Ana Allen Lima refers to a large number of employee ideas that ended up impacting PT commercial portfolio (see links IP1, IP2 and IP3 in Figure 31).

But there was also a major improvement in internal processes. The great number of employees' ideas in this area was especially affected by the change in mindset (that innovation is reserved for products and services only) for which corporate communication was essential. Some of processes and behaviours improvements include, for example: (i) the encouragement of employees to use the stairs instead of the elevators allowed great energy consumption reductions; (ii) internal auctions of discontinued equipment allowed releasing large areas of warehouse space; (iii) implementing a concept of copy-points with network printers improved employee convenience, resulting in greater satisfaction and productivity increase; (iv) creating corporate printing profiles to print "by default" on both sides allowed great cost reductions.

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[6] Considering a scale of 0 to 100

### 4.7.3.2 Support Processes

As said before, it's obvious that communication systems like Intranets play an important role in the social process of organizational change (Bharadwaj, 2000) and in the corporation strategy when used effectively (Armitage, et al., 2006).

Ana Allen Lima and Dalila Ribeiro Martins agree that communicating objectives and strategic initiatives, showing top management commitment and sponsorship as well as empowering communication team is essential to success. Dalila Ribeiro Martins adds that to be used effectively, information must be consistent, aligned with strategy, up-to-the-minute and with quality although this is only relevant when common processes are established and the organization perceives the importance of change.

In the corporate information reviewed we found a large amount of news and articles showing sponsorship of top management and communicating change associated with new projects (see annexes).

To Dalila Ribeiro Martins "Corporate Culture", "Alignment" and "Teamwork" are affected by corporate communication practices in the way that it's a tool that communicates ("to tell") a way of being but must reflect corporate policies, cross organization management actions and corporate initiatives ("to do") .

## 4.8 Discussion

This chapter discusses the validity of the results and whether they could be generalized to other domains than Portugal Telecom Employee Portal. The discussion serves as the basis to our conclusions that will give answer to the applicability of the theoretical framework in practice.

The framework combined Strategy Map and Benefits Dependency Network to illustrate the path and flows of value-creation, the relationships between "intangible assets" and the representation of "enabling changes projects".

With literature review of corporate documents, we developed the theoretical BDN framework that helped filling in the framework and after that we validated the information through interviews. Both of these tasks resulted in validating the initial literature review.

We cross-checked the information, triangulating with the Employee Satisfaction Questionnaire results, that together with the employee portal projects timeline, confirmed the previous statements.

But although all the validation and triangulation, we understood that Portugal Telecom went through a big cultural transformation with multiple initiatives and a big technological transformation with various distinct projects. And this scenario of change could have affected the results.

From the case study data analysis, we've collected some evidences to sustain the following statements:

a) The introduction of internal support processes might only be of relevance for internal projects like knowledge  management, quality, internal communication, business process improvement, i.e.;

b) The framework might be more applicable to longer complex projects and programs where strategic systems are considered;

c) The addition of internal support processes to the framework and the consequent value-fluxes towards intangible assets are only possible in ("internal") projects like Quality, Communication and Knowledge Management, i.e.;

d) When addressing corporate alignment and corporate culture, communication seems to be essential to promote it. Therefore the quality, coherence and frequency of communication should be subject of analysis and our framework doesn't address this thematic.

# 5   Conclusion

This chapter presents the conclusions of the research thesis, addressing the issues raised. It also presents some limitations to the study carried out, recommendations and suggestions for future work.

Employee portals are relevant information capital assets that perform an important role in the organization strategy and it's essential to understand the role performed by the employee portal in the organization strategy.

We performed a preliminary study comprising a literature review and data collection followed by semi-structured interviews and employee satisfaction questionnaire results analysis to triangulate and confirm all the data gathered. To help understanding the cause-effect relationships that generates business value, as well as providing top management and decision makers the information needed for a suitable top-down commitment and sponsorship, we developed a framework combining Strategy Map and Benefits Dependency Network (BDN).

## 5.1   Answering the research question

The major intention of this thesis was to understand how does employee portal contributes for the intangible assets value creation. We found several evidences corroborating literature review establishing that Employee Portal works as a strategic tool that promotes corporate culture and alignment through information and communication fluxes and teamwork through collaborative functionalities. These findings were identified in corporate literature and interviews and validated through employee satisfaction questionnaires results.

From the case study we could also confirm that communication processes and practices are essential to the implementation of corporate culture, alignment and teamwork and that corporate culture is very important in creating alignment and promoting collaboration, sharing knowledge and innovation and teamwork can help to reinforce corporate culture.

These findings allow us to conclude that although "promoting corporate culture" and "company alignment" are not among managers' most frequent expected outcomes or business drivers on Employee Portal implementations it should be strongly considered.

Looking into Employee Portal implementations and Employee Satisfaction Questionnaires we've concluded that Corporate Communication that has positively impacted on alignment which became even more evident when all company intranets were phased-out between 2009 and 2011.

We developed a framework illustrates the path and flows of value-creation. The literature review chapter helped us identifying some relevant aspects we took into consideration when combining Strategy Map and Benefits Dependency Network. This case study allowed

us to validate the importance of identifying strategic projects and change management initiatives ("enabling changes"). The case study also allowed validating the importance of integrating internal support processes that generate value to intangible assets – mainly organizational capital – into the strategy map and the representation of flows of value-creation between the "intangible assets".

## 5.2   Contributions

The Employee portal is one of the internal communication channels created to guarantee the following strategic objectives: (a) alignment between internal communication and corporate strategy, to (b) promote shared culture within the group and to (c) promote a fluid communication allowing the integration and exploitation of synergies between companies and employees of PT (Martins, 2002).

In a survey carried on with 261 US employers that planned to have an employee portal, Forrester Research identified top Business Drivers and Outcomes from Employee Portal Implementations. We noticed that promoting corporate culture and company alignment is not among the frequent answers obtained.

Therefore, we understand that our study contributes to the body of knowledge surrounding leadership and organizational behaviour by revealing a successful Employee Portal implementation as a strategic tool with a relevant role in corporate culture and alignment.

Evidence in this study suggests that implementations of employee portals must consider transformational changes within organizations in order to implement new support processes and communication fluxes that guarantee cohesion and quality of information. This concern is addressed by the developed framework.

This framework combines Strategy Map and Benefits Dependency Network introducing new elements to Strategy Map that show the synergies between intangible assets, identifies support processes and their impact on intangible assets ("virtuous process feedback") and enabling changes, essential to manage change.

We believe that this framework may contribute to the discussion and possible evolution of strategy maps and will help organizations enhancing their strategy knowledge, to reduce the risk of projects failure, and to capture real value from their investments. However, the theoretical framework should be used and applied in other case studies in order to be generalized.

## 5.3 Limitations

We must acknowledge some limitations to the study. Portugal Telecom faced a great cultural and technological transformation in the last years and there were other projects we did not took into account due to time restrictions. As an example, the unification of networks and the unification core information systems could also have contributed to the creation of a unique identity and therefore introducing some bias in our analysis of the Employee Satisfaction Questionnaire indicators. There were also multiple initiatives implemented since 2008 (such as transversal business units, realization of unique Christmas party and standardization of employee children Christmas gifts and parties and implementation of single career model) that were not technological but could have affected positively corporate culture (Portugal Telecom, 2008)(Portugal Telecom, 2009).

For the thesis purpose we focused on communication support processes and didn't consider the validation of the framework with knowledge management support processes which we believe are also relevant to the creation of value process and have a direct contribution to organization innovativeness and to human capital valorisation.

The Benefits Dependency Network was developed with the objective of contributing to the framework. The identification of all BDN components was based on existing corporate information and, although it was validated by the major stakeholders, it was made post project implementation. We believe that in a conceptual approach this doesn't affect the framework but can introduce some bias in the benefits identification.

## 5.4 Future work

We developed a framework that combined Strategy Map and Benefits Dependency Network to help organizations addressing concerns related with value creation and change management and applied it to this Employee Portal case study, as a means to understand how a corporate employee portal contributes for the intangible assets value creation process, and how can we predict, measure and evaluate the impacts generated by those assets.

Our research unfolds the application and validation of the framework in the case study above, and should be extended to other cases.

This would include applying the framework to similar projects in the company or to similar projects in other companies of the same and distinct industry (e.g. industry and manufacturing, banking, or public sector). Another possibility is to evaluate completely different investment projects related to areas such as knowledge management, human resources, marketing or customer relationship management. Future work should also consider quantitative approach towards the statistical validation of results and performing workshops to develop the BDN.

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## Annexes

### Annex 1 – Context of thesis delivered in interviews

To build the information foundations needed to perform the interview, this document makes an introduction to the thesis theme, to Benefits Management and to the usage of Benefits Dependency Network.

a) Short introduction to the study

Employee portals are relevant information capital assets that perform an important role in the organization strategy. But justifying investments in these solutions it's not an easy task and their implementation, demands for great changes in culture, behaviour and processes. Therefore it's essential to understand employee portals business value and build adequate change management programs.

The main and unique research question is directly related with the difficulties to understand the role performed by the employee portal in the organization strategy:

*"How employee portal contributes for the intangible assets value creation?"*

This thesis considers an employee portal case study performed as a means to understand how a corporate employee portal contributes for the intangible assets value creation process.

The case study concerns the demonstration of potential linkages between organization's **Culture (OC1)**, **Alignment (OC2)**, **Teamwork (OC3)** and **Employee Portal (IC1)** Intangible assets, **Internal communication support process (SP1)**, **Identification of opportunities** for new products and services innovation process **(IP1)** and the associated **enabling changes (ECn)** performed in the organization.

b) Benefits Management

The need to carefully justify, measure and control benefits of ICT investments should lead to the need of understanding them. Actually, "not all investments will be able to be justified financially". However, the ability to explicitly measure the benefits is essential to their delivery. Additionally it is essential to review the benefits that are, and are not, realized from each investment, allowing an organization to increase the value it obtains from all its ICT investments (Ward, et al., 2006 p. 356).

"The benefits management approach was developed to enable organizations to improve the value realized from specific investments" but it can also be used "to

formulate, manage and implement strategic change programmes" and to "help formulate and implement business strategies" (Ward, et al., 2006 p. 383). Lin & Pervan agree that "the process model of benefits management developed by the Cranfield research program can be used as the basis for guidelines on best practice in benefits management" (Lin, et al., 2001 p. 15).

The following picture represents Cranfields' benefits management model. In the first phase (Identify and structure benefits) it's used the tool Benefits Dependency Network to identify benefits.

Figure 32: A process model for benefits management (Ward, et al., 2006)
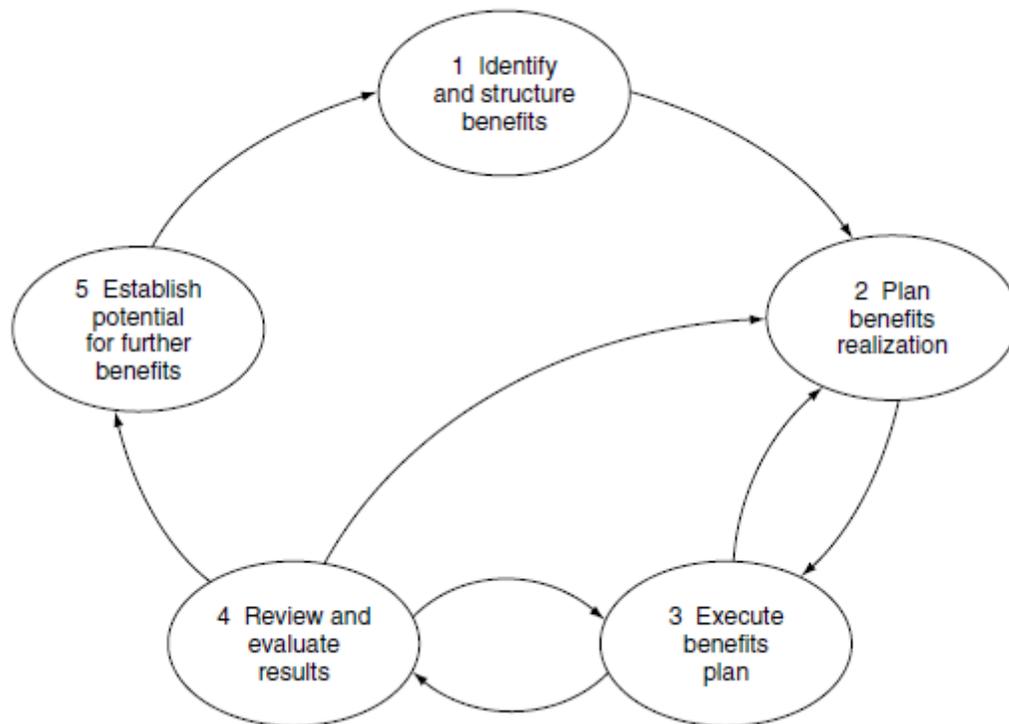


c) Benefits Dependency Network

The benefits dependency network is a key output from the activity of determining the changes required for the delivery of each benefit and how the ICT development will enable these to occur (Ward, et al., 2006), (Peppard, et al., 2007).

Figure 33: The benefits dependency network (Ward, et al., 2006)
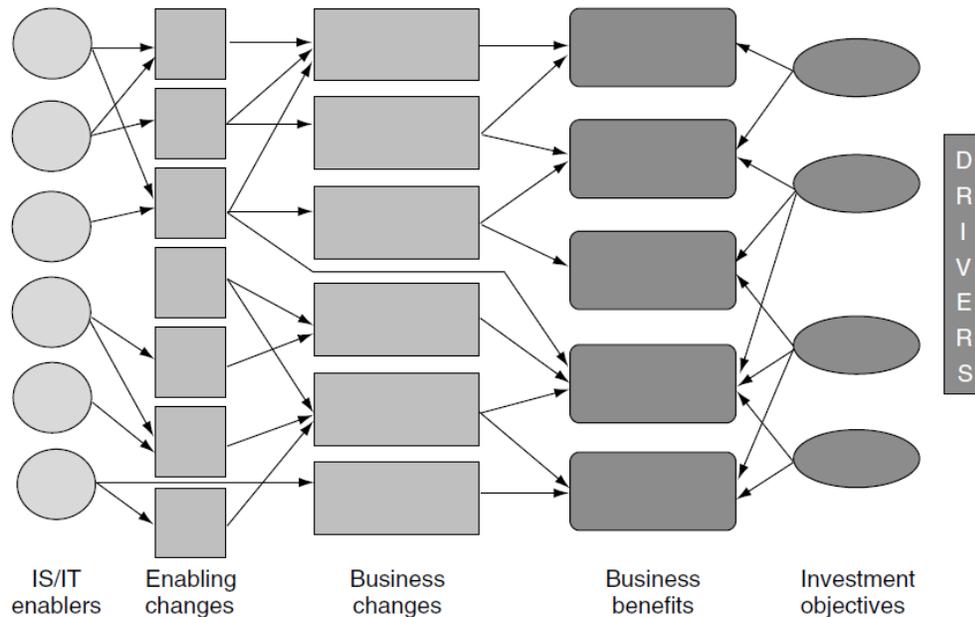


The development of the Benefits Dependency Network varies, depending on whether a problem-based or innovation-based investment is being considered. Whether the case, the "development of the Benefits Dependency Network not only enables the knowledge and experience of business managers to be applied more coherently to planning the investment, but it also creates a clearer understanding of how different groups need to work together to achieve the benefits they and the organization wish to gain" (Peppard, et al., 2007 p. 20) and of the changes needed to deliver those benefits (Peppard, et al., 2007).

d) Building the Benefits Dependency Network

According to Ward, et al. (2006), while constructing the network for problem-based investments it is first necessary to define with precision the improvement targets that can be achieved if the problems or constraints are removed. These form the objectives for the investment. The benefits that achieving the objectives will deliver are also identified. Current processes and ways of working are then analyzed to identify possible combinations of business changes and IT functionality that could deliver the benefits. The objectives and benefits are then finalized for the preferred option. With this information a full business case will be developed, by quantifying the expected levels of improvement and their financial values (Ward, et al., 2006).

Figure 34: BDN construction for problem-based investments (Peppard, et al., 2007)
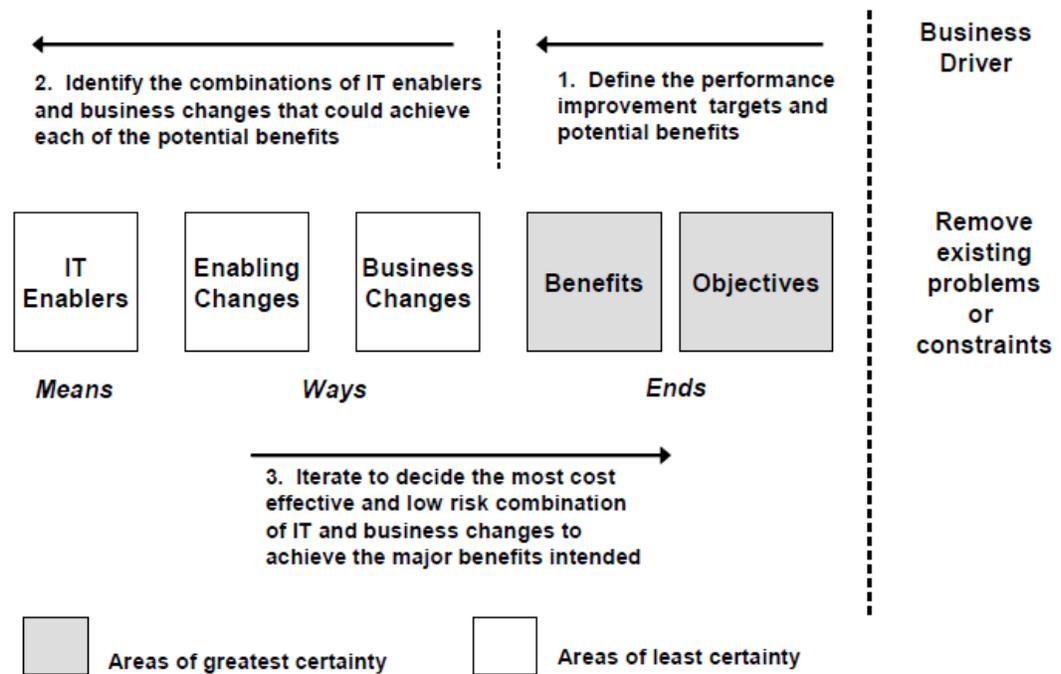


Hereafter we'll present an hypothetical BDN, constructed based on corporate documentation, literature reviewing (namely Seruya's Thesis "La marque interne éPT! au service du management de l'identité organisationnelle du Groupe Portugal Telecom", Seruya, 2008 and his book "éPT! A marca interna da Portugal Telecom", Seruya, 2009) and the authors' experience and knowledge of the company.

The objectives of this interview are (a) to validate the linkages between the various components of the hypothetical BDN and (b) to identify other components that weren't obvious in the evidences gathered but are still relevant.

e) Employee portal implementation timeline

In the following image we identify the major milestones related to the projects that implemented the distinct employee portal areas and functionalities.

Figure 35: Employee portal implementation timeline
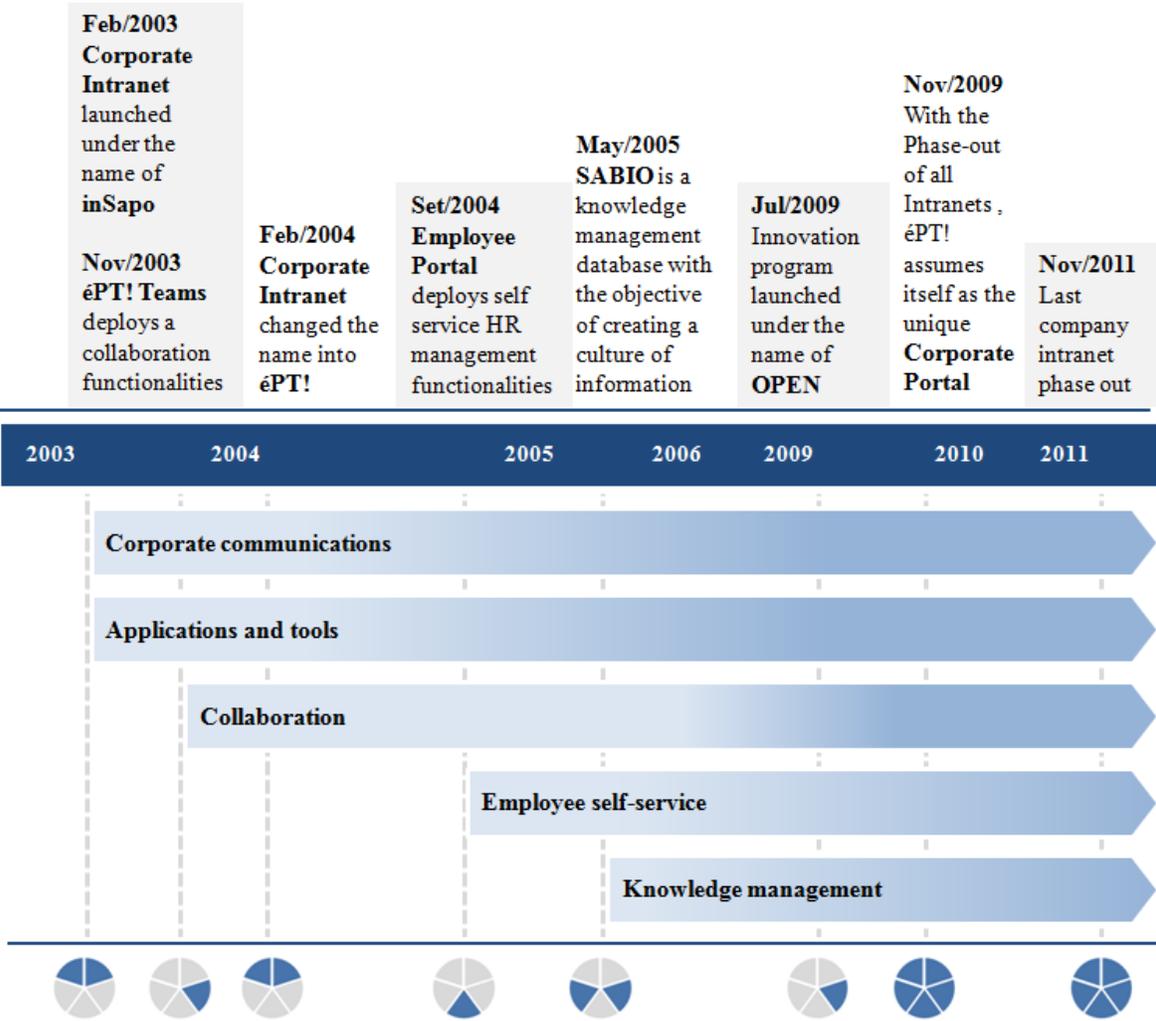
f)   Developed Benefits Dependency Network

Figure 36: Developed BDN based on literature review of corporate documents
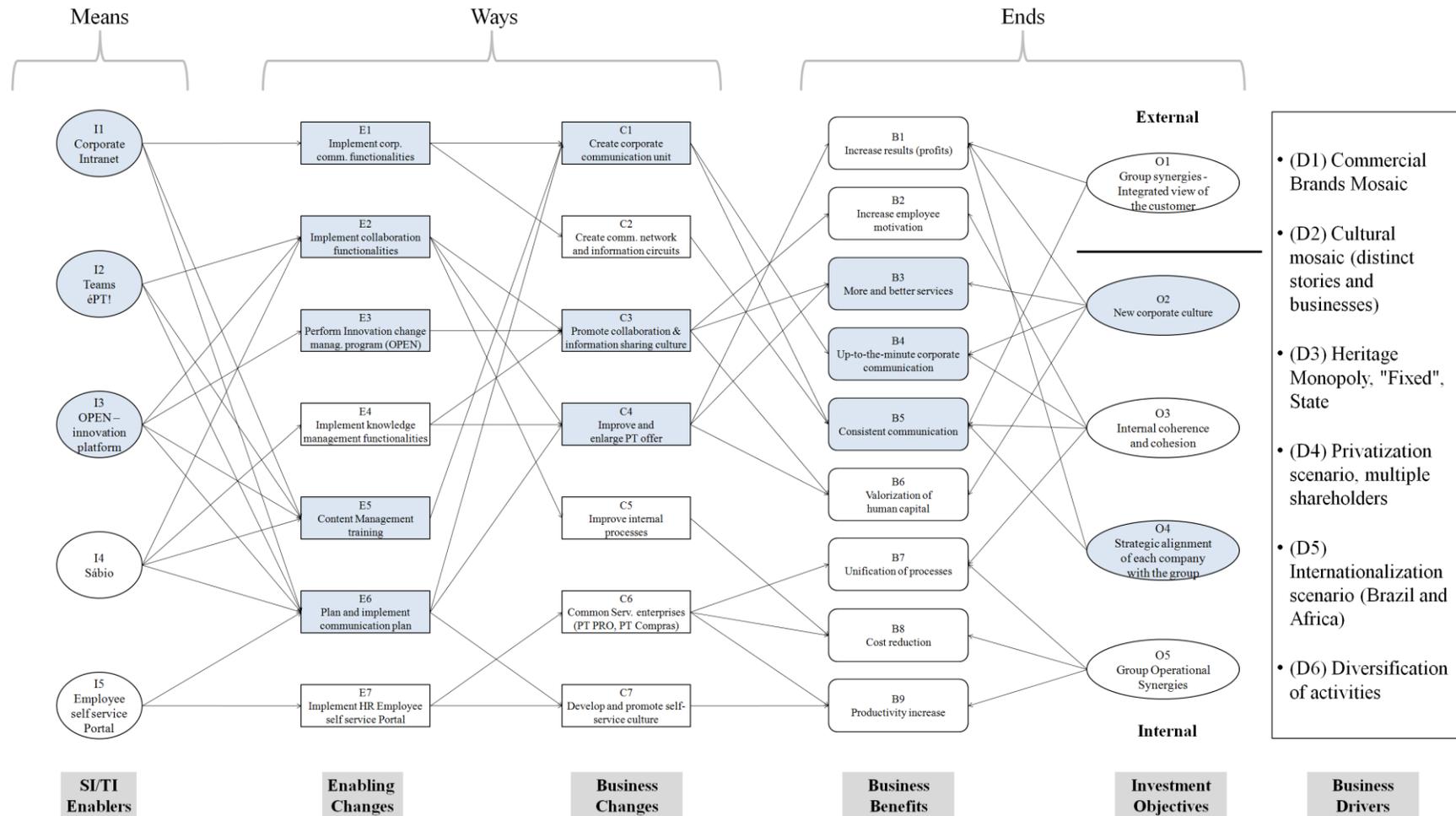
## Annex 2 – List of questions of semi-structured interviews

### I. Questions addressed to Corporate Communication and Image

**Q1**: **Do you agree with the links considered in the RDB** to connect the distinct elements (business drivers, business objectives, business benefits, enablers, enabling changes and business changes)?

**Q2**: Was there any relevant **Enabler** (major functionality or system) or **Enabling Change** (project or major activity) that **we didn't identify** in the Benefits Dependency Network?

**Q3**: Do you agree with the **business changes identified**? Did we fail to see some relevant business change?

**Q4**: Do you agree with the **business benefits identified**? Do you think we left any relevant business benefit out?

**Q5**: Was there any other **business benefit realized and not planned**?

**Q6**: Considering "**Corporate culture**", organize the following issues according to the **relevance to promote it**:
    a) Corporate Intranet **functionalities**;
    b) Existence of a **dedicated team** to communicate with the organization;
    c) Quality of the **information published**;
    d) **Processes and procedures** implemented.

**Q7**: In your opinion is there any **relationship** between "**Corporate Culture**", "**Alignment**", "**Teamwork**", "**Employee Portal**" and "**Information**"?

**Q8**: Do you think "**Corporate Culture**", "**Alignment**" or "**Teamwork**" **can be** directly **affected by the existence of corporate communication** practices?

*Communication is essential to guarantee that employee understand top management commitment and sponsorship* (Jassim, 2002) *and can promote a networking, information sharing culture, which has to be a part of organizational culture* (Stancich, et al., 2000).

*The importance of developing an adequate corporate culture to promote collaboration, sharing knowledge and innovation is consensus among academics and practitioners. In fact Bharadwaj (2000) describes knowledge management as a "social process that requires tremendous organizational change" and he says that creating a culture for knowledge management involves both technological and social aspects like changing the organization structure, control and communication systems and reward structures.*

**Q9**: In your opinion what **was the role of the employee portal** towards the creation of a **unique corporate culture**?

*Corporate Communication as an essential tool to perform adequate change when implementing Corporate Culture and the influence that communication has on culture and vice-versa* (White, et al., 2010). *This data is also relevant in the benefits monitoring once evidences the achievement of one of the business objectives.*

**Q10**: do you agree that "the development of a **corporate culture is essential to promote collaboration**, sharing knowledge and innovation" (Marr, et al., 2004)?

*Alignment requires that all employees are empowered in the same direction. Leaders must create awareness of the high-level strategic objectives and then they must ensure that individuals and teams have local objectives and rewards that contribute to achieving targets for high-level strategic objectives* (Kaplan, et al., 2004).

*Most leaders will agree, the degree by which their vision is communicated effectively to each member of the organization in order that their contribution is aligned with the financial outcomes determines the success of that organization and this process of strategy alignment requires the creation of a "strategic culture" which is often the primary function of strategy alignment initiatives* (Estes, 2007).

**Q11**: In your opinion what was **the role of the employee portal** towards the creation of **corporate alignment**?

**Q12**: Considering "**Alignment**", organize the following issues according to the **relevance to promote it**:
    a) Corporate Intranet **functionalities**;
    b) Existence of a **dedicated team** to communicate with the organization;
    c) Quality of the **information published**;
    d) **Processes and procedures** implemented.

## II. Questions addressed to Human Resources and Leadership Management

**Q1**: **Do you agree with the links considered in the RDB** to connect the distinct elements (business drivers, business objectives, business benefits, enablers, enabling changes and business changes) in the scope of the Employee self service Portal (I5)?

**Q2**: Was there any relevant **Enabler** (major functionality or system) or **Enabling Change** (project or major activity) **related with HR** that **we didn't identify** in the Benefits Dependency Network?

**Q3**: Do you agree with the **business changes identified**? Did we fail to see some relevant business change related with employee portal?

**Q4**: Do you agree with the **business benefits** related to human capital that we identified (B2 - Increase employee motivation, B6 - Valuation of human capital, B9 - Productivity increase)? Do you think we left any relevant business benefit out?

**Q5**: Was there any other **business benefit** realized and **not planned**?

**Q6**: In your opinion **what was the role of the employee portal towards the creation of a unique corporate culture**?

**Q7**: **do you agree** that "the development of a **corporate culture is essential to** promote **collaboration**, sharing knowledge and innovation" (Marr, et al., 2004)?

## III. Questions addressed to Innovation Factories Management

**Q1**: **Do you agree with the links considered in the RDB** to connect the distinct elements (business drivers, business objectives, business benefits, enablers, enabling changes and business changes) in the scope of the Open Innovation platform (I3)?

**Q2**: Was there any relevant **Enabler** (major functionality or system) or **Enabling Change** (project or major activity) that **we didn't identify** in the Benefits Dependency Network?

**Q3**: Do you agree with the **business changes identified**? Did we fail to see some relevant business change?

**Q4**: Do you agree with the **business benefits identified**? Do you think we left any relevant business benefit out?

**Q5:** Was there any other **business benefit realized and not planned?**

**Q6**: In your opinion is there any **relationship between** "**Corporate Culture**", "**Alignment**", "**Teamwork**", "**Employee Portal**" and "**Information**"?

*According to IBM (2008), to achieve true innovation, "companies must make data available to more people in the organization; change the corporate culture to one of collaboration and trust; and implement tools to harness collective knowledge, experience and communities" (IBM, 2008 p. 3).*

**Q7**: **Do you agree** that "*the development of a corporate culture is essential to promote collaboration, sharing knowledge and innovation*" (Marr, et al., 2004)?

**Q8**: Do you agree that "The use of **collaboration practices is the starting point to create innovative processes**, products or services" IBM (2008)

***Communication*** *is essential to guarantee that employee understand* ***top management commitment and sponsorship*** *(Jassim, 2002) and can* ***promote a networking,***

*information sharing culture, which has to be a part of organizational culture* (Stancich, et al., 2000).

**Q9**: Considering "**Teamwork**", organize the following issues according to the relevance to promote it:

    **a)** Employee Portal collaboration **functionalities**;

    **b)** Existence of a **dedicated team** to manage the process of innovation;

    **c) Commitment and sponsorship of top management** communicated in the intranet;

    **d) Processes and procedures** implemented.

*Kaplan states that "organizations can do better at measuring outputs, such as number of ideas transferred or adopted or number of new ideas and practices shared with other teams and organization units"* (Kaplan, et al., 2004 p. 306).

**Q10**: **Can you share some information on the number of ideas**, in terms of growth and the number of ideas (coming from the market or from workshops) that resulted in commercial products and services and those which resulted in internal processes and procedures improvement? Can you share de **website usage statistics** over the years?

**Q11**: Do you think that **the increase of** Employee Satisfaction Questionnaire **indicator** "**PT invests in developing innovative products and services**" from 2008 to 2011 **is related with the employee portal**?

## Annex 3 – Editorial, éPT! magazine, nº 1, April-May 2003

é

## cultura PT

Miguel Horta e Costa,
Presidente Executivo do Grupo PT

A criação da marca éPT! surge como um acto de celebração da nossa cultura comum. A celebração dos nossos sucessos, da nossa liderança e da nossa unidade. A primeira condição para uma celebração conjunta é a possibilidade de comunicarmos uns com os outros. É por essa razão que a comunicação representa um dos eixos de transversalidade do Grupo PT - é através da sua actuação que se unem pessoas, projectos e empresas. A Portugal Telecom, que tem sido uma empresa atenta aos sinais do mercado, nivelando as suas opções pelas melhores práticas, quer também, nesta matéria, ser uma empresa de referência. Comunicar com os clientes, parceiros, público em geral é determinante para o sucesso de uma empresa. Comunicar com os seus colaboradores é a garantia desse sucesso.

A necessidade de comunicação num grupo como a PT é ainda mais acentuada pela sua dimensão e diversidade. Somos um grupo que reúne várias dezenas de empresas, localizadas em vários pontos do globo e com um total de 22 mil colaboradores activos. Apostamos, por isso, numa grande amplitude de abordagens e mesmo de linguagem. O ponto de partida do projecto éPT! foi o lançamento, em Fevereiro último, do portal corporativo InSapo. A partir de uma marca líder no universo PT, o Sapo, construímos uma plataforma de comunicação online que, pela primeira vez, colocou todo o grupo em contacto ao minuto. Este é o momento em que damos mais um passo em frente no desafio de sermos um grupo cada vez mais forte, integrado e unido. A marca éPT! será, doravante, o nosso suporte de comunicação interna. O cartão de colaborador PT – um cartão de vantagens e descontos que será oferecido aos colaboradores do Grupo - , a nossa revista corporativa – a primeira a incorporar uma proposta de comunicação comum a todas as empresas do grupo – e uma newsletter mensal são já projectos com a chancela éPT!.

A revista que agora chega às vossas mãos desempenha um papel fundamental na celebração éPT!. É nas suas páginas que nos vamos encontrar a cada edição, é nas suas histórias que vamos fazer a ponte entre todos os colaboradores do Grupo PT.

éPT! é a marca que nos une.
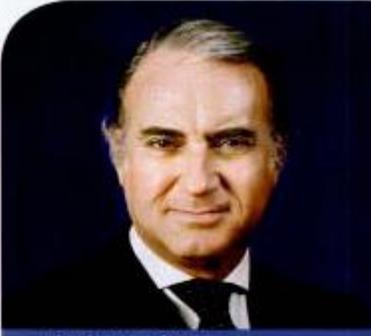
*As opções culturais condicionam cada vez mais o destino de povos, nações e também das empresas.*
*A Portugal Telecom é uma empresa de bem com as suas raízes culturais.*
*São essas raízes que nos permitem no século da informação viver numa cultura forte, rica e líder.*
*Uma cultura que se renova todos os dias, cresce e reforça-se nos rituais diários.*

3

**Annex 4 – Editorial, éPT! magazine, nº 3, September-October 2003**

# éPT! Editorial

## Futuro Partilhado

Miguel Horta e Costa,
Presidente Executivo

Em Outubro, a Portugal Telecom associou-se, na qualidade de patrocinador, à conferência que trouxe o ex-presidente americano, Bill Clinton, ao nosso país. Em conjunto com o Diário de Notícias, jornal detido pelo Grupo PT, e com o Diário Digital, fomos assim responsáveis por uma das conferências mais importantes na agenda de 2003, em Portugal.

Ao ouvir Bill Clinton discursar sobre globalização e os caminhos do futuro, não pude deixar de reflectir sobre quão a par andam os destinos das nações e das empresas. Uma das principais mensagens do ex-presidente americano era precisamente sobre a necessidade de partilha. A interdependência, a diversidade e a cooperação, afirmou, são linhas incontornáveis nos dias que correm. Para concluir que o desafio está na resposta que temos para dar a essas grandes questões.

Na PT, como em qualquer organização do nosso tempo e em especial as que têm maior dimensão, estas são igualmente questões críticas. E, estou convencido, na Portugal Telecom estamos a encontrar as respostas certas.

Somos um Grupo que cada vez mais tem de funcionar de forma interdependente. Na abordagem ao nosso cliente – que é o mesmo em vários momentos e com produtos e serviços distintos –, no nosso relacionamento interno e no nosso enquadramento no mercado. A Portugal Telecom, é importante não esquecer, actua como agente único do Serviço Universal de Telecomunicações em Portugal e esse é, provavelmente, o selo maior da nossa interdependência com a sociedade.

*"A interdependência, a diversidade e a cooperação,(...), são linhas incontornáveis nos dias que correm."*

Somos também um grupo onde a diversidade marca pontos. Diversidade de negócios, geográfica, de idades e de competências. É essa diversidade que nos faz fortes, é essa diversidade que temos de saber potenciar.

Por último, a cooperação. Não é por acaso que a Comissão Executiva que lidero tem assumido um patrocínio permanente e activo da causa da transversalidade e do espírito de equipa. Sabemos bem o quão importante é trabalhar com, bem mais do que trabalhar para. A mesma atitude move-nos no nosso relacionamento com os vários parceiros de negócio, de projecto e, no limite, parceiros no mundo onde em conjunto vivemos. É esse entendimento que nos faz, apenas a título de exemplo, sermos há tanto tempo tão actuantes e mesmo pioneiros em matéria de cidadania empresarial. É essa cooperação – entre equipas, entre empresas e entre colaboradores – que permite que a Portugal Telecom alcance os níveis de excelência que os prémios que nos são atribuídos evidenciam. Numa edição que destaca um conjunto assinalável de distinções, obtidas por todas as empresas, não posso deixar de destacar todo o trabalho que sustenta esse reconhecimento. Um trabalho de equipa, um trabalho de equipas e, se me é permitido usar um estrangeirismo, um trabalho *oriented-for-good*.

O futuro que nos aguarda é aquele que em conjunto construímos. Eu acredito, tal como referiu Bill Clinton, que todos contamos, todos merecemos uma oportunidade e, sobretudo, trabalhamos melhor em equipa do que isoladamente.

## Annex 5 – Launching Employee Portal inSapo in 2003

éPT > **Empresa** > **Em Foco** > **Notícias** > **2003**



24-10-2003
**InSapo é projecto-chave no Grupo PT**

Que significado atribuí ao portal corporativo do Grupo PT? Qual a importância do InSapo? Quisemos saber o que pensavam os membros da Comissão Executiva. Miguel Horta e Costa, Zeinal Bava, Carlos Vasconcellos Cruz, Iriarte Esteves, Paulo Fernandes e o secretário-geral Luís Sousa Macedo deram-nos os seus testemunhos.

**Miguel Horta e Costa, presidente executivo**
"Numa empresa de comunicação, que é líder quer em Portugal, quer noutros países designadamente no Brasil, não faria sentido que nós não tivéssemos soluções de excelência na área da comunicação dentro da própria empresa. Temos de ter soluções que não só estejam na vanguarda da tecnologia, mas acima de tudo soluções que permitam à empresa cada vez funcionar com mais eficiência, ser cada vez mais competitiva e isso passa por ter toda a massa humana, que é o principal capital deste Grupo, coeso, sólido, através duma rede, que no fundo interaja, todas as boas vontades de cada colaborador do Grupo. Isso consegue-se através de soluções como esta. O portal corporativo é uma algo que faltava e em boa hora o estamos a lançar".

<u>Testemunho de Miguel Horta e Costa</u>


**Zeinal Bava, administrador financeiro**
"Somos fortes, porque somos um grupo: é essa característica que nos traz excelência. O InSapo é uma iniciativa decisiva no reforço da nossa cultura de grupo e na construção de uma pista de aterragem comum a todos os colaboradores do Grupo PT".

<u>Testemunho de Zeinal Bava</u>


**Carlos Vasconcellos Cruz, administrador e presidente da PT Comunicações**
"O portal corporativo tem a missão de ser uma porta de entrada comum a todos os colaboradores do grupo. Pertencemos ao maior grupo privado português, portanto primeiro que tudo está o grupo, depois estão obviamente as várias unidades de negócio. Espero que as pessoas quando cheguem à empresa, a primeira coisa que façam é ligar os seus computadores e passar os olhos sobre o Portal do Grupo e a partir daí então avançarem para todas as aplicações, noticias, enfim, o normal num dia de trabalho. Penso que é uma iniciativa de grande importância e que dá grande coesão ao grupo Portugal Telecom".

<u>Testemunho de Carlos Vasconcellos Cruz</u>


**Iriarte Esteves, administrador e presidente da TMN**
"A transformação da PT num conjunto de empresas separadas, num grupo actuando coordenadamente em equipa exige meios de comunicação interna poderosos e este portal InSapo vai contribuir decisivamente para esse objectivo".

<u>Testemunho de Iriarte Esteves</u>


**Paulo Fernandes, administrador e presidente da PT - SI**
"O Portal InSapo corporiza um conjunto de ferramentas que agora temos ao dispor de todo o Grupo e que nos vão permitir construir novas aplicações e redesenhar processos para melhorar a performance. As pessoas vão passar a sentir-se parte de uma grande comunidade, podendo interagir dentro dessa comunidade por forma a aumentar as sinergias entre as diferentes empresas do Grupo".

<u>Testemuho de Paulo Fernandes</u>


**Luís Sousa Macedo, secretário-geral da Comissão Executiva**
"O portal corporativo é da maior importância por duas razões: mais informação para todos os colaboradores do grupo e um espírito de corpo".

<u>Testemunho de Luís Sousa Macedo</u>

## Annex 6 – éPT! first anniversary

29-04-2004

**Parabéns éPT!**
Há exactamente um ano, o Grupo PT lançou a sua marca de Comunicação Interna, a éPT!. Iniciativa pioneira em Portugal, a éPT! deu nome a um conjunto amplo de iniciativas que envolveram colaboradores de todas as empresas do Grupo. É por isso hoje um símbolo de partilha, coesão e sentimento de pertença ao Grupo PT:
No dia em que assinalamos o primeiro aniversário da marca de todos nós, fazemos um balanço das principais iniciativas.

A marca éPT! é criada com um objectivo bem definido: num universo vasto como o do Grupo PT, envolvendo 24 mil colaboradores, presente nos cinco continentes e com negócios diversificados, era necessário encontrar um elemento agregador da comunicação. Adesão, participação, partilha por cada um dos colaboradores foram as premissas utilizadas no desenvolvimento de uma marca que se tornaria a primeira marca de comunicação interna em Portugal. A éPT! nasce a partir de uma expressão positiva que apela ao sentimento de pertença de todos, de uma forma simples, directa e de compreensão imediata – é nosso, é da PT!. Que correspondia em pleno à nova forma de encarar os colaboradores e a comunicação.
A nova marca apresenta-se aos colaboradores, a 29 de Abril de 2003, concretizada em dois suportes de comunicação de grande impacto: o cartão éPT! e a Revista éPT!. Arrancava assim uma marca de comunicação que ao longo do primeiro ano esteve presente nos principais momentos da vida do Grupo, agregando colaboradores de todas as empresas do grupo em torno das iniciativas.
Hoje recordamos estes principais momentos éPT! e fazemos o balanço da utilização dos principais suportes de comunicação.

**InSapo agora éPT! – O portal corporativo do Grupo PT**
Um portal de intranet corporativo que junta as componentes de informação e ferramenta de trabalho. Funciona como porta de entrada no ambiente Web, comum a todos os colaboradores, e a partir do portal é possível aceder ao universo particular de cada empresa. A vida diária das empresas PT é neste portal comunicada aos colaboradores, assegurando um fluxo regular de informação interna baseado numa estratégia editorial de qualidade e transversalidade a todas as empresas do grupo.
Uma média de 650 mil visitas mensais e um total de cerca de 6 milhões de visitas no ano de 2003 são números que expressam a adesão do universo de colaboradores ao portal corporativo.

**Equipas éPT!**
Com o objectivo de dar a conhecer reciprocamente as diversas equipas que trabalham no universo das empresas do Grupo Portugal Telecom, este é um suporte que dinamizou os contactos internos, oferecendo visibilidade a todos quanto diariamente contribuem para a vida da empresa. Com a identificação das diferentes equipas, líderes, colaboradores e projectos, este projecto promove a consolidação de uma cultura de grupo e a partilha das melhores práticas. Uma forma de todos os colaboradores conhecerem e se darem a conhecer, através da fotografia, do vídeo e da informação sobre o conteúdo funcional do trabalho de cada departamento. Permitirá no limite a elaboração de um verdadeiro Mapa PT.

## Annex 7 – Launching Employee self service portal

éPT > **Empresa** > **Em Foco** > **Notícias** > **2004**

07-09-2004
**Arranque do Portal do Colaborador no Grupo PT**

O Portal do Colaborador está disponível desde o dia 6 de Setembro para cerca de 11.300 colaboradores. Uma nova ferramenta desenhada a pensar na simplificação do dia a dia de todos os colaboradores do Grupo PT

Após a disponibilização do portal aos colaboradores da PT PRO e TMN (para gestão de dados do cadastro) e da entrada em produtivo para a PT Comunicações nos Açores e Madeira, o Portal do Colaborador chegou no dia 6 de Setembro, aos restantes colaboradores da PT Comunicações, assim como à PT Prime, PT SGPS, PT Inovação, Tradecom e PT Meios.

No final do primeiro dia de entrada em produtivo do Portal nestas empresas, registaram-se inúmeras tentativas de acesso, resultando num total de 4042 sessões (incluindo os acessos da PT PRO, TMN e PTC Açores e Madeira).

Ainda durante o dia 6 de Setembro, verificaram-se cerca de 157 pedidos relacionados com a assiduidade, 40 pedidos de alteração do estado civil e 70 pedidos de alteração de morada.

A partir de agora, cerca de 11.300 colaboradores, têm a possibilidade de aceder à nova ferramenta que de um modo geral, permite simplificar os seus pedidos, aumentar a rapidez de resposta às suas solicitações e disponibilizar de forma mais imediata toda a informação que necessitam consultar.

Aceda aqui ao curso do portal

Sempre que tenha alguma questão ou dúvida referente à utilização do portal poderá aceder a este curso.

Terá ainda ao seu dispor o serviço de suporte e gestão aplicacional, todos os dias úteis das 8:30 às 19:30, através dos seguintes **contactos**:

Telefone: 21 500 33 24
E-mail: ptpro.portaldocolaborador@telecom.pt

Contamos consigo para nos apoiar na introdução do Portal do Colaborador, o sucesso da transição para os novos sistemas também depende de si!

## Annex 8 – Unique corporate intranet

éPT > **Empresa** > **Em Foco** > **Notícias** > **2009**



12-11-2009
**A nova intranet de todos e para todos**
Ela é para todos, é nossa, é única. É a nova intranet éPT!, uma nova porta de entrada para um mundo que é construído por todos, todos os dias. Navegue neste novo espaço

A nova intranet éPT! vem reunir num espaço comum os colaboradores de todas as empresas da Portugal Telecom. Todos partilham da mesma porta de entrada para o mundo PT. Esta mudança simboliza o caminho que a empresa tem vindo a percorrer para o reforço de uma cultura única, a cultura PT.

As intranets de cada empresa são assim descontinuadas, contudo, todos os colaboradores continuam a ter acesso a informação específica relativa à empresa em que exercem actividade, ao nível das áreas "empresa", "colaborador", "aplicações", "serviços" e também em termos das áreas de "destaques" e "notícias".

Conheça a nova intranet através do Guia Virtual disponibilizado na homepage da intranet.

Com esta mudança, a PT prevê incrementar o sentimento de identificação organizacional de todos os colaboradores. Mas a promoção de uma identidade única passa também pelo reforço da participação e respeito pela visão de todos.

Neste momento de viragem queremos conhecer a sua opinião acerca da nova intranet éPT!. Envie-nos as suas observações sobre este espaço que é de todos e para todos através do e-mail ept@telecom.pt.
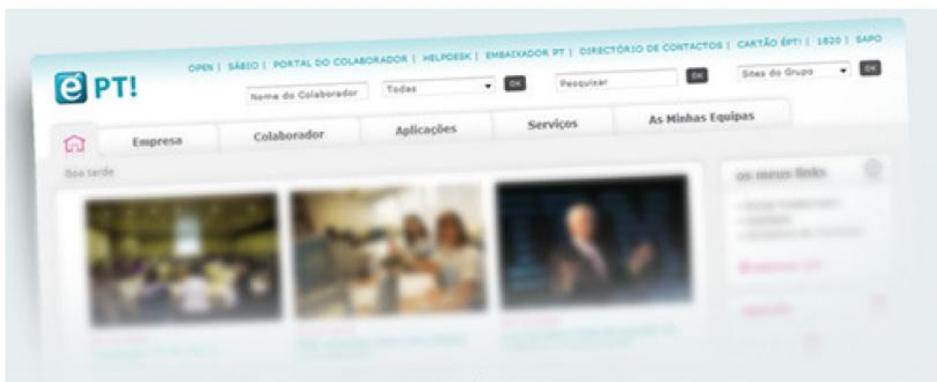


**PT sempre na liderança Tecnológica**

A nova Intranet está suportada em tecnologias de virtualização, permitindo a racionalização de recursos, assegurando na área de tecnologias de informação o cumprimento da estratégia de sustentabilidade da PT. Esta infra-estrutura é a base da plataforma de "private Cloud Computing" que permite a agilização do fornecimento das necessidades computacionais da PT, numa lógica de "Dynamic IT".

## Annex 9 – Timeline of Employee Portal related projects, until 2010

éPT > **Empresa** > **Em Foco** > **Notícias** > 2010



**15-02-2010**
**éPT! sete anos de ligações PT**
A história da Intranet éPT! cruza-se com a história de todos os colaboradores e empresas da Portugal Telecom. Há sete anos – 14 Fevereiro de 2003 – surgiu com o objectivo de reforçar uma cultura em prol do crescimento do Grupo. São sete anos de mudanças, melhoramentos, novos espaços, funcionalidades e serviços que hoje fazem da intranet éPT! a única porta de entrada para o mundo PT.

A Portugal Telecom tem vindo a promover o reforço de uma cultura única, a cultura PT, com o objectivo de incrementar o sentimento de identificação organizacional de todos os colaboradores. A promoção de uma identidade única foi reforçada em Novembro de 2009 com a criação da nova Intranet éPT!. As intranets de cada empresa foram descontinuadas para dar lugar ao novo portal único, um espaço agregador de informação e ligação ao mundo PT.

Mas para chegar a 2010 como intranet única, o éPT! escreveu uma longa história, com início em Setembro de 2002. Nesta altura, os responsáveis de comunicação das empresas PT, que operavam em Portugal e no Brasil, reuniam-se no Workshop de Sesimbra. Este foi o primeiro passo para a adopção da nova estratégia de comunicação e criação do Gabinete de Comunicação Corporativa, projectos que cruzavam esforços com a estratégia de webificação do Grupo PT.

Em Dezembro de 2002 a aposta no reforço da cultura PT resultou na criação do InSapo, o portal corporativo do grupo, efectivamente lançado a 14 de Fevereiro de 2003. Com esta iniciativa reforçava-se uma cultura de Grupo comum a todas as empresas, sem se esquecer a identidade própria de cada unidade de negócio e, paralelamente, disponibilizava-se informação de uma forma mais eficiente, de modo a aumentar a competitividade do Grupo. A escolha inicial do nome InSapo justificava-se pelo apoio e inspiração no Sapo, o maior portal português e uma das bandeiras do Grupo PT.

Da procura de novos desafios registou-se a primeira mudança: nascia o éPT, a nova marca do portal corporativo, com um novo layout, que passou a identificar todos os suportes e projectos de comunicação interna.

Em Julho de 2003, no dia em que se comemoravam os cinco anos sobre a compra da Telesp Celular no Brasil, uniram-se numa só as redes de todas as empresas do Grupo e, pela primeira vez, os colaboradores do Grupo PT em Portugal puderam aceder à intranet brasileira.

A par da nova organização da informação e das novas funcionalidades, o sucesso da aposta era visível também pelo número de adesões ao Cartão éPT! e pela criação do Informail éPT!, que passou a reunir todas as notícias da Portugal Telecom publicadas na Comunicação Social. No primeiro ano o portal recebeu cerca de 6 milhões de visitas, com uma duração média por visita de 12,5 minutos.
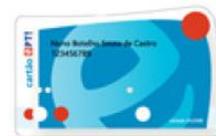
Em 2005 novas áreas foram criadas. O Sábio éPT!, o portal do conhecimento da Portugal Telecom, o canal do éPT éDirecto ao assunto!, que surge com o objectivo de trazer respostas a todas as solicitações dos colaboradores, o canal PT TV e o renovado Directório de Contactos.

Em parceria com a PT-ACS, foram criados em 2006 dois novos subcanais



relacionados com a Saúde. "Temas Clínicos" e "Informações Úteis" passavam a estar disponíveis na área de Colaborador.

Uma nova plataforma de comunicação surgiu em 2007, o Clipping éPT!, que reunia oas extintos Resumo Diário e Infomail. Também neste ano foi renovado o site do Cartão éPT! e nascia um novo espaço de partilha de informação com a área "As minhas equipas".



A pensar na satisfação dos clientes PT foi criado, em Janeiro de 2008, o "Eu Resolvo!". Através deste serviço os colaboradores passaram a entrar no desafio da qualidade de serviço, ao intermediar a resolução de problemas e esclarecimento de dúvidas a clientes.

Outubro de 2009 marca o surgimento de um novo espaço de conhecimento. Os "Dossiers éPT!" passaram a disponibilizar informação com foco nos diversos negócios da empresa e convidam os colaboradores a colocarem à prova os seus conhecimentos com os Quizz Time, testes de conhecimento cujas respostas certas valem prémios.

Ao longo destes sete anos o portal cresceu, ambicionando aproximar colaboradores e empresas. Este crescimento teve o seu ponto alto com a apresentação da nova intranet única, a 12 de Novembro de 2009.

Novo layout, novos espaços, novas experiências. Agora, na "Minha área", os colaboradores podem personalizar a sua página com os seus dados pessoais e seleccionar informação consoante os seus interesses e necessidades diárias. No que concerne a Responsabilidade Social Interna na PT foi criado um espaço, na área Colaborador, dedicado ao éConsigo. Esta é uma área privilegiada de divulgação e promoção das acções que visam o envolvimento da empresa com os seus colaboradores e respectivas famílias.
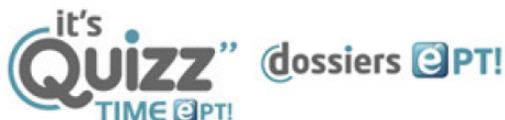




Um único espaço, uma história comum a toda a empresa. O éPT! completa sete anos. Parabéns!

## Annex 10 – Ninth anniversary of the corporate intranet

éPT > **Empresa** > **Em Foco** > **Notícias** > **2012**



14-02-2012

**"O que é isto" 9 anos depois?**
A esta pergunta hoje respondemos: - O nosso mundo, um espaço único de todos e para todos na Portugal Telecom. Falamos da intranet éPT!, que hoje celebra 9 anos, um meio privilegiado de comunicação interna que possibilita que seja celebrada uma cultura comum na empresa.

Há 9 anos que a Portugal Telecom faz uma aposta diária na comunicação com os seus colaboradores, através da intranet éPT!. O objetivo? Fomentar uma cultura comum a todos, ao mesmo tempo que se estimula a identificação dos colaboradores com a organização. Para o cumprimento deste objetivo tem sido decisiva a partilha de informação e conhecimento e a disponibilização de aplicações e serviços que visam facilitar o relacionamento entre as pessoas e o exercício das suas funções na empresa.

Os resultados alcançados não deixam margem para dúvidas. A intranet éPT! mudou ao longo destes 9 anos para melhor responder aos desafios de comunicação atuais e às necessidades dos colaboradores. A intranet cresceu em termos de conteúdos, aplicações, funcionalidades e tornou-se única para toda a empresa.



14 de fevereiro de 2003 - Lançamento do InSapo



29 de abril de 2003 - lançamento da marca éPT!

Hoje, a marca éPT! simboliza uma cultura que une todo o universo PT. Mas nem sempre foi assim. Começou como **InSAPO**, a 14 de fevereiro de 2003. Dois meses mais tarde lia-se na intranet "é meu! é teu! é nosso! O que é isto? é a hora! de todos ficarmos a saber!". E o que todos ficaram a saber é que nascia uma nova marca interna – **éPT!**.

As novidades não se fizeram esperar e três semanas depois do lançamento da marca, foi anunciado um mundo de vantagens para os colaboradores, materializado no **cartão éPT!**.

Mas o foco não se ficou pelo que cá dentro se dizia da PT. Para dar destaque ao que diariamente lá fora era notícia sobre a empresa, foi criado, em janeiro de 2004, o **Infomail éPT!**, que acabaria por ser substituído em fevereiro de 2007 pelo **Clipping éPT!**.

No fundo, tudo isto resume uma aposta na informação e no conhecimento, que veio a ser reforçada, em maio de 2005, com o lançamento do **Sábio éPT!**.

Depois, a resposta para todas as dúvidas puderam ser encontradas no **éDirecto**, um canal que contou com uma equipa especializada que respondia às solicitações dos colaboradores.



A partir de 1 de fevereiro de 2007 o Clipping éPT! passa a substituir o Infomail éPT!

A comunicação em vídeo também não foi descurada, para isso foi criado em setembro de 2005 o **canal PT TV**, um espaço em que ganham visibilidade os anúncios publicitários de televisão, reportagens, entre outros conteúdos.

A resposta às necessidades diárias dos colaboradores também surgiu, em 2006, com a criação do Diretório de Contactos, a par da criação d' A Minha Área, uma página que pode ser personalizada por cada colaborador e que, em fevereiro de 2010, evoluiu disponibilizando **novas funcionalidades**.

**12 de julho de 2005 - lançamento do éDirecto**

O potencial de partilha de informação e colaboração entre as pessoas na PT também aumentou com a criação da área **As Minhas Equipas**,

uma ferramenta de fácil utilização que possibilita, dentro de cada espaço, fazer votações online, criar arquivos com contactos, visualizar tarefas, realizar fóruns de ideias, criar um repositório centralizado de documentos, gerir a comunicação em equipa, entre outros.

Através da criação do canal "**Eu Resolvo!**", os colaboradores também passaram a poder intermediar o atendimento a clientes, seus familiares, amigos ou conhecidos, gerando assim maiores níveis de satisfação e assumindo um papel mais ativo no alcance dos objetivos do Serviço ao Cliente da Portugal Telecom.

**A 1 de fevereiro de 2010 foi lançada uma nova versão d' a minha área**

Em novembro de 2009, o éPT! mudou. Este momento veio assinalar uma nova etapa na comunicação com todos os colaboradores, lançando-se uma nova imagem e melhores funcionalidades. Este foi um importante momento de viragem que previu a descontinuação das intranets de todas empresas e a criação de uma **intranet única**.

Em julho de 2010, o éPT! também se tornou num espaço privilegiado de celebração dos aniversários dos colaboradores. Com este objetivo, e no âmbito do éConsigo! Celebrar, a PT passou a disponibilizar uma ferramenta– **Aniversários do Dia** – que permite saber quem são os aniversariantes do dia e enviar um sms ou um cartão de parabéns.

**A 12 de novembro de 2010 foi lançada a nova intranet éPT!**

Todas as vantagens e benefícios para colaboradores PT, que anteriormente eram abrangidas pelo Cartão éPT! e pela área Vantagens e Protocolos, passam, no início de 2012, a estar disponíveis na nova área **Vantagens éPT!**.

A partir de janeiro de 2012, todos os colaboradores passam a ter ao seu dispor no Campus PT a nova área **Comunidade**, onde podem aceder a fóruns e chat e lançar temas para debate, partilhar conteúdos, colocar questões e sugestões. Uma nova área à medida de cada um!

**A 9 de janeiro de 2012 chegaram as Vantagens éPT!**

## Annex 11 – First anniversary of the Employee self service portal

éPT > **Empresa** > **Em Foco** > **Notícias** > **2005**
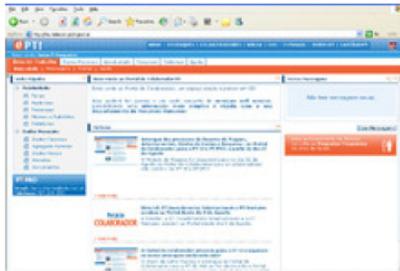


08-09-2005
**Portal do Colaborador Celebra 1 Ano**
Há um ano que a vida dos colaboradores do Grupo PT mudou... para melhor. Com cerca de 14000 utilizadores o Portal do Colaborador celebra o seu 1º aniversário

No dia 6 de Setembro de 2004 foi lançado o Portal de Colaborador com o objectivo de simplificar e melhorar a vida do colaborador dentro da empresa.
Hoje cerca de 14000 mil colaboradores do Grupo PT acedem diariamente ao Portal através do seu PC ou via quiosques que se encontram nas instalações da PTC em todo o país e fazem dele uma ferramenta de trabalho diária.
O nº de acessos contabiliza-se na casa dos milhões. As funcionalidades mais utilizadas são as relacionadas com o registo de assiduidade (presenças/ausências) abonos e subsídios (prevenção, trabalho suplementar, etc) e marcação/autorização de férias.
Refira-se que nesta área de gestão de férias a PT Comunicações foi pioneira em termos de implementação do módulo de gestão de tempos e disponibilização do mesmo, via Portal, o que permitiu agilizar e simplificar todo o processo de registo, controlo e aprovação das actividades relacionadas com a gestão da assiduidade dos colaboradores.
Um saldo bastante positivo ao fim de um ano de existência e que se espera melhor todos os dias.

**Annex 12 – Launching Equipas éPT!, éPT! magazine nº 4 – Christmas special, 2003**

Tudo começou com uma verdadeira azáfama de marcações. "Bom dia, gostávamos de marcar uma entrevista com a sua equipa. Para além da entrevista, será feito um pequeno filme e realizadas fotografias individuais. Quando pode ser?" Os responsáveis pela agenda da Iniciativa Equipas éPT! repetiram esta frase um sem número de vezes. Tantas quantas as necessárias para chegar ao fim de Dezembro com a primeira etapa do projecto concluído: no total, 132 equipas estão agora *online*.

"Equipas éPT!? Mas o que vai acontecer? E para que irá servir?". Do outro lado da linha, as perguntas também se multiplicaram. Curiosidade, sugestões e, sobretudo, um grande espirito de colaboração ajudaram a colocar de pé um projecto que em Janeiro conhecerá a sua segunda etapa. Mais equipas serão entrevistadas, novos projectos, rostos e contactos ficarão à distância de um clique. Equipas éPT! é uma iniciativa que visa conhecer e dar a conhecer as equipas que trabalham no Grupo PT, tornando-se assim numa ferramenta de trabalho para uma maior interactividade entre empresas, equipas e trabalhadores. A explicação chegou a todas as empresas do grupo. Objectivos? Consolidação da Cultura de Grupo e elaboração de um verdadeiro Mapa PT.

O primeiro passo deste trabalho foi o levantamento das primeiras equipas a serem entrevistadas. Num universo vasto como o da Portugal Telecom, as centenas de equipas foram divididas de forma a fasear o trabalho em várias etapas. No final, todas estarão devidamente identificadas: as duplas de jornalistas e fotógrafos irão visitar todas as empresas e todas as equipas, até o mapa ficar completo. No futuro, o projecto tornar-se-á exigente sobretudo ao nível da actualização da informação, necessária sempre que se registam novas entradas ou mudanças de equipa. "A participação de todos é e será fundamental. O que se pretende é que, independentemente de também existir uma coordenação central, cada equipa cuide deste seu espaço no mundo PT, assumindo a responsabilidade pelos nomes e projectos listados", refere Abílio Martins, director central de Comunicação Corporativa.

A primeira etapa desta iniciativa envolveu as direcções de primeira linha das empresas Lusomundo Audiovisuais, Portugal Telecom SGPS, PT Multimédia, PT Sistemas de Informação, TV Cabo, PT Comunicações, PT Inovação, PT PRO e TMN.

No mês de Janeiro vai ter início a segunda fase das Equipas éPT! durante a qual vão ser visitadas as direcções de segunda linha. " Queremos mudar a cultura da empresa, isto é, passar do *save*, onde cada um guarda a informação para si, para o *upload*, onde se partilham as mesmas práticas, passamos a transmitir e partilhar conhecimento. Esperamos que esta iniciativa seja um contributo útil nesse sentido", sublinha Abílio Martins. é

*por Diana Nigra*

éPT! Especial Natal 2003

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**Annex 13 – éPT! magazine, nº 5, 2004**

TEMA DE CAPA

# NOVOS OBJECTIVOS NOVA ATITUDE

Adoptar uma abordagem integrada perante o cliente e procurar oportunidades de crescimento internacional são os pilares da nova estratégia da Portugal Telecom. Porque a PT é só uma, é importante uma nova atitude.

Fixo, móvel, televisão por subscrição, sistemas de informação, inovação, internet, audiovisuais, media e investimentos internacionais. Estes são, entre outros, negócios que fazem parte do portfólio do Grupo Portugal Telecom, aos quais estão ligadas marcas como TMN, PT Comunicações, Netcabo, TV Cabo, Telepac, Sapo ou Lusomundo. Até agora, todos estes negócios têm sido encarados de uma forma individualizada. Contudo, a evolução das tecnologias alterou por completo as tendências do mercado e os hábitos de consumo obrigam a uma nova forma de actuação.

Hoje, já é possível que o mesmo terminal funcione como um telefone fixo quando se encontra dentro de sua casa ou na sua empresa e como um telefone móvel quando sai para a rua. Voz, dados e vídeo também já podem ser transmitidos sobre qualquer uma das redes, fixo, móvel e cabo. Daqui decorre que os clientes sejam cada vez mais neutros relativamente à tecnologia utilizada, exigindo em contrapartida soluções integradas para as suas necessidades de comunicações. Estes factos constituem, nas palavras do Presidente Executivo, "uma razão poderosa para que todos compreendam que a PT é só uma e que é necessário actuar como tal".

Miguel Horta e Costa realça: "temos cerca de 33,5 milhões de clientes e somos a empresa nacional com maior projecção no mundo. Este é, sem dúvida, um motivo de orgulho muito especial. Estamos à frente do maior operador móvel da América do Sul e o quarto maior do mundo. O top 5 do negócio móvel mundial fala português e isso acontece por causa da Portugal Telecom".

São estes os principais motivos que justificam a reestruturação recentemente anunciada. Os pilares desta nova estratégia estão bem definidos: enfoque no cliente e crescimento internacional. De acordo com a gestão, estes não são mais dois chavões tantas vezes utilizados pelos gestores, existindo medidas concretas que pretendem dar respostas aos desafios que se colocam.

Com estes objectivos foi desenhada uma nova estrutura organizativa que, de acordo com o Presidente Executivo, Miguel Horta e Costa, "permite-nos tornar numa empresa centrada no cliente e prepara-nos para novas oportunidades de crescimento internacional".

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## O enfoque no cliente:
### Transformar a PT numa "love brand"

A necessidade de concentrar atenções no cliente não é, segundo a gestão, um mero acaso. Parafraseando o presidente da Cisco, Miguel Horta e Costa afirma que "o importante é saber gerir permanentemente a mudança e saber onde é o meu foco".

Assim, esta estratégia está baseada numa mudança de paradigma. Nas últimas duas décadas, dominou um paradigma do crescimento, onde importava ocupar espaço, desenvolver tecnologias e criar mercados. Hoje a realidade é outra. "A nossa liderança não pode ser feita usando fórmulas do passado", explica.

O paradigma da indústria de telecomunicações é agora um paradigma de serviço ao cliente.

No III encontro de quadros estratégicos do Grupo Portugal Telecom, em Dezembro de 2003, Miguel Horta e Costa afirmava que a PT deveria ajustar-se ao novo paradigma do mercado, que tem como elemento central o cliente. "O paradigma do fixo-móvel-cabo está a mudar. Temos os melhores engenheiros, gestores e produtos mas, o foco tem de ser no cliente. Todos juntos temos de transformar a empresa numa máquina comercial. Se não vencermos este desafio não vencemos o futuro", dizia então o Presidente Executivo.

Surge então a necessidade de desenvolver a área da qualidade em termos transversais de todo o Grupo. "Temos de ter uma maior percepção do serviço prestado", reitera Miguel Horta e Costa recordando um exemplo já seguido pela congénere espanhola Telefónica, em que um administrador não executivo lidera a Comissão da Qualidade.

Ao nível nacional, Miguel Horta e Costa esclarece que o modelo de desenvolvimento assenta na captura de oportunidades transversais de melhoria de eficiência, apoiando-se para isso, não só nas redes e funções de suporte partilhados, mas também numa nova orientação ao cliente, abordagem esta que se divide nos segmentos pessoal, residencial e soho (pequenos negócios) e empresarial.

"A hora chegou para que o Grupo Portugal Telecom se organize por segmento de clientes", sublinhou. De uma forma mais detalhada, na gestão de redes, o Grupo tem como objectivo avançar de forma decisiva na captura de sinergias operacionais entre empresas. No segmento "Pessoal" a aposta continua a ser inequivocamente no negócio móvel que, de acordo com o Presidente Executivo, "se assumirá cada vez mais como o meio principal de oferta de serviços de voz e dados personalizados para o indivíduo".

Ao nível de "residencial e soho", o objectivo é avançar no sentido de um maior enfoque no desenvolvimento da oferta de voz, banda larga e vídeo. Finalmente, no segmento "Empresarial", é objectivo do Grupo apostar cada vez mais na emergência de ofertas de soluções integradas empresariais (voz e dados, fixo, móvel e sistemas).

"A PT posiciona-se, doravante, inequivocamente como uma empresa ao serviço do cliente. É essa a nossa prioridade, é essa a nossa missão. É também essa a minha prioridade pessoal e a minha missão mais importante enquanto presidente da comissão executiva: ser o guardião dos interesses dos clientes. São esses interesses e o respeito e satisfação exemplar dos mesmos que permitirão à PT manter e melhorar o seu estatuto de referência nacional de excelência, inovação e rentabilidade. Por consequência, é também esse o caminho que assegura a criação de valor accionista, meta que assumi como prioritária quando aceitei liderar esta comissão executiva", conclui.

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### A aposta na internacionalização

Os desafios ao nível do mercado internacional, onde reside parte substancial do potencial de crescimento do Grupo, exigem nas palavras de Miguel Horta e Costa, "um acompanhamento ao nível da Comissão Executiva". Por este motivo, está a proceder-se à criação de uma nova unidade, a PT Investimentos Internacionais, que irá supervisionar os negócios no exterior, com destaque para o Brasil, Marrocos e Angola e analisar oportunidades de crescimento nestas e noutras geografias. "O Brasil é cada vez mais merecedor de uma atenção privilegiada". Em termos de mercado brasileiro destaca-se a Vivo, "onde os principais desafios consistem na manutenção de uma liderança de mercado rentável e na concretização do potencial de melhorias resultante da integração operacional".

O Presidente Executivo chama ainda a atenção para a importância desta nova área, tendo em conta a onda de Fusões e Aquisições que se adivinha no futuro do sector. "A empresa deve antecipar esses movimentos, encarando a necessidade de entrar noutros mercados, não emergentes, mas sim maduros, criando valor accionista", explica.

*"A empresa deve (...) entrar noutros mercados, não emergentes, mas sim maduros, criando valor accionista."*
Miguel Horta e Costa

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## A PT é só uma

"Quero deixar claro que a grande mudança está na atitude. É importante que, cada vez mais, esta empresa se sinta uma só". É desta forma peremptória que Miguel Horta e Costa se refere à reestruturação. Uma atitude que pretende fazer da PT uma só. Para tal, o Presidente Executivo reitera a necessidade de "todos os colaboradores trabalharem em conjunto colocando a competência e as capacidades ao serviço de uma única entidade que realmente conta para quem anda no mundo dos negócios: o cliente".

Mas o que significa "a PT é só uma"? Este é um desafio que a gestão coloca a todos os colaboradores do Grupo. Para que seja ganho foram definidas algumas orientações estratégicas:

- Desenvolver uma cultura de partilha de informação
- Criar uma cultura de responsabilização de forma a resolver as solicitações dos clientes em todos os pontos de contacto
- Criatividade e inovação
- Espírito de equipa
- Orientação para o cliente

Os dados estão lançados. "O sucesso deste trabalho depende da nossa actuação como equipa. Esse é o grande desafio de todos nós", conclui Miguel Horta e Costa.

## Como se organiza a Portugal Telecom

O primeiro passo na implementação da estratégia delineada consistiu na reestruturação do actual modelo de governo do Grupo, nomeadamente através da realocação de cargos, negócios e áreas de responsabilidade pelos membros da Comissão Executiva.

A PT Comunicações, maior empresa do Grupo, passará a ter a sua actividade estruturada em dois grandes eixos de actuação: a área residencial e soho e as empresas.

Cada uma destas áreas será coordenada por uma das vice-presidências da empresa, cabendo a Zeinal Bava a liderança do segmento Residencial (residencial e soho) e a Iriarte Esteves a liderança do segmento Empresas (grandes clientes, negócios empresariais, clientes operadores e operações).

A Miguel Horta e Costa (Presidente Executivo) e a Zeinal Bava e Iriarte Esteves (vice-presidentes), juntam-se na comissão executiva da PT Comunicações Graça Bau, Carlos Duarte, Manuel Rosa da Silva, Alfredo Baptista, Pereira da Costa e David Lopes. Esta reestruturação conduz igualmente a alterações na PT Multimedia, nomeadamente na TV Cabo, empresa cujo presidente executivo Graça Bau integra agora a Comissão Executiva da PT Comunicações. O presidente executivo da PTM, Zeinal Bava, assume assim a presidência da TV Cabo, cabendo a Luís Pacheco de Melo acompanhar de forma operacional a actividade da empresa, assegurando a coorde-nação com as restantes áreas de negócio da PT Multimedia.

O desenvolvimento do negócio internacional fica agora sob a liderança de Carlos Vasconcellos Cruz um gestor que, nas palavras de Miguel Horta e Costa, "tem grande sensibilidade para a condução desta área estratégica".

Nas palavras de Miguel Horta e Costa, as alterações decorrentes desta reestruturação deverão aprofundar o modelo de governance do Grupo PT. "Não posso estar mais satisfeito com o modelo que defendi para a gestão dos vários negócios. Se hoje superámos, com muitíssimo bons resultados, o período conturbado que as empresas de telecomunicações e as demais atravessaram e estamos em condições de dar este passo, que quase diria histórico, no sentido de nos transformarmos numa empresa centrada no cliente, tal só foi possível porque todas as quintas-feiras, na reunião da comissão executiva, se sentam à mesa os responsáveis pela condução dos negócios do Grupo. Que debatem ideias, discutem estratégias, mas, sobretudo, assumem a gestão da empresa como uma só e não como a soma das partes. Esta é, sem dúvida, uma vitória deste modelo de gestão. O que iremos fazer daqui para a frente é aprofundar ainda mais este modelo".

*por Nuno Sequeira*

## Annex 14 – Visão magazine, 29th January, 2004



Comunicar para dentro
Visão, 29 de Janeiro de 2004

éPT!. É este o nome da primeira grande acção maciça de comunicação interna feita em Portugal, com o objectivo de transformar os 24 mil colaboradores em 24 mil porta-vozes da Portugal Telecom. A Visão visitou os bastidores da comunicação interna do Grupo PT e conheceu a estratégia do projecto que revolucionou a comunicação interna da Portugal Telecom. InSapo, Cartão éPT!, SMS Corporativo, Newsletter mensal e revista éPT! são exemplos de iniciativas que já mereceram reconhecimento externo.

Em declarações à Visão, Abílio Martins, director de comunicação corporativa da PT sublinha "comunicamos para dentro como se comunica para fora". O Presidente Executivo, Miguel Horta e Costa referiu que, "um dos principais ganhos é a motivação", para a qual a partilha transparente de informação é um factor chave. Sublinhou ainda que "para mim, a PT é só uma".

## Annex 15 – Sabio launch, éPT! magazine nº 11, 2005

|MUNDO PT ▪▪▪▪▪

# Se quer saber...
## pergunte ao Sabio

O novo sistema avançado de *business intelligence on-line* do Grupo PT, o Sábio, revela-se um livro aberto para o sector e para o mundo. Uma ferramenta indispensável à gestão e um recurso valioso para a empresa, para o sector e para o país

>> O conhecimento só é útil se for partilhado. É esse o objectivo do Sábio éPT!, uma marca que junta a estrutura e *know-how* do centro de gestão do conhecimento (CGC) da direcção de comunicação integrada (DCI) da PT Comunicações, a uma ferramenta *on--line*, que tem como principal desafio construir uma verdadeira cultura de informação e conhecimento no Grupo PT. Com a escolha da designação Sábio, pretende-se transmitir uma marca atractiva e intuitiva para quem usa. Uma *one stop information shop*, verdadeiro consultório onde se pode saber tudo sobre o sector. O reforço da vertente digital na disponibilização da informação assume-se como vector principal deste projecto, coordenado pela DCI em parceria com a PT – Sistemas de Informação.

Mas "desenhar dia a dia o panorama do sector, não é tarefa fácil". Quem o diz é Conceição Casanova, responsável, desde 1982, pela estrutura em que trabalham cerca de sete colaboradores a gerir um dos activos estratégicos do Grupo: o conhecimento. Uma "vantagem competitiva" só possível pelo *know-how* de quem está habituado a acompanhar a dinâmica das telecomunicações. Como sublinha Conceição Casanova, este "é um trabalho que passa muito pela experiência e sensibilidade". Unir a empresa ao sector e ao mundo, através do conhecimento, implica um planeamento que passa pelo "diálogo interno" e por "estar atento" aos projectos em curso, às preocupações da gestão e aos novos modelos de negócio.

Por outro lado, é importante acompanhar o que se passa no exterior em termos da estratégia dos outros operadores e também dos fornecedores de informação. Qualquer colaborador do Grupo PT pode recorrer ao Sábio éPT! através do portal éPT!, a intranet corporativa do Grupo ou da intranet da PT Comunicações, a Zoom. Oferece serviços de consultoria especializada e realiza pesquisas a pedido da gestão das empresas do Grupo, o Sábio éPT! está aberto às solicitações dos colaboradores. Paralelamente, externamente à empresa, todos os que tenham interesse em consultar informação sobre telecomunicações podem contactar o CGC e solicitar apoio nas suas pesquisas. ⓔ

## Sabe como pode melhorar o seu trabalho?
é conhecimento! Pergunte ao Sábio.

"Sempre que posso compro informação em formato digital. Em cinco minutos tenho um relatório sobre determinado tema no meu computador e em mais cinco minutos distribuo pelas pessoas que necessitem de trabalhar com esses dados"

éPT! | 7

**Annex 16 – Sábio, éPT! magazine nº 12, 2006**

# Sábio abre portas aos Autores PT

Com a nova área "Autores PT" disponível no Sábio éPT!, os colaboradores do Grupo podem agora partilhar o seu conhecimento com toda a organização



Sabe tudo sobre a sua concorrência?

Pergunte ao Sábio.
é conhecimento! Na nossa intranet ept.telecom.pt

>>O portal Sábio passou a integrar documentação produzida por colaboradores do Grupo PT. Na área Autores PT poderá encontrar artigos e apresentações de colaboradores do Grupo nas diversas áreas do conhecimento, tais como engenharia, redes, sistemas de informação, telecomunicações fixas e móveis, inovação, segurança, economia e gestão, recursos humanos, formação, finanças, organização, direito, comunicação e saúde. Com esta nova funcionalidade expandiu-se o alcance da base de dados já existente, essencialmente focada em documentação externa, para uma perspectiva global, interna e externa ao Grupo. Este projecto visa optimizar o tempo de preparação e desenvolvimento de novas acções e projectos, facilitar a identificação de especialistas e potenciais fontes de conhecimento em diferentes áreas de actuação do Grupo PT. Contribui ainda para a construção de uma forte cultura de grupo. Se ainda não conhece o Sábio visite http://sabio.telecom.pt. é

**Annex 17 – The new éPT!, éPT! magazine nº 12, 2006**

ePT! | B O A S   P R Á T I C A S

Se conversar com alguém especializado em redes, essa pessoa certamente dirá que uma intranet é... uma rede privada de computadores. Isto do ponto de vista estritamente técnico.

Às vezes, as intranets são usadas de forma pontual, para apoiar um projecto específico ou como uma mera porta de acesso a sistemas desenvolvidos para acessos internos. Na realidade, a intranet não é apenas uma rede física, mas, sim, "ponto de encontro da informação", restrito ao ambiente interno da empresa. O seu objectivo é ligar toda a empresa e contribuir para uma maior conexão. As intranets reflectem o perfil da organização, e são o local onde podemos encontrar a sua estrutura e a sua cultura. Pensar em intranet leva-nos a pensar também em comunicação interna, cultura organizacional, gestão do conhecimento.

## >> Um longo caminho desde 2004

O portal éPT! é a intranet corporativa do Grupo PT desde 14 de Fevereiro de 2004. A nova versão, lançada no dia 5 de Dezembro, procurou melhorar em tudo. Um projecto conjunto da direcção de comunicação corporativa e da PT – Sistemas de Informação possibilitou que, a partir de agora, o novo éPT! passe a ser a sua porta de entrada na empresa. O grande objectivo é melhorar a organização, melhorando também a forma que cada colaborador tem de encontrar a informação que precisa, através de uma navegação mais intuitiva e integrada.

O objectivo é que cada colaborador possa potenciar cada vez mais as capacidades do novo éPT!. A mudança assenta em três pilares essenciais: na informação, na colaboração e nos serviços. Ao

**O grande objectivo é melhorar a organização, melhorando também a forma que cada colaborador tem de encontrar a informação que precisa, através de uma navegação mais intuitiva e integrada**

nível da informação, os padrões de qualidade vão melhorar, mudando a fórmula de organização. Os destaques e as notícias mantêm-se, tal como a área de colaborador, aparecendo a informação corporativa e financeira com um novo visual e com uma utilização ainda mais simples.

### >> Colaboração *on-line*

No que se refere ao pilar da colaboração, este será uma das grandes novidades do novo éPT!. A colaboração *on-line* vai possibilitar, no futuro, organizar os contactos, os projectos, entre outras soluções das equipas com quem trabalha. Vai facilitar também as reuniões, pois vai ter a opção de reuniões virtuais, bem como videoconferências, e vai oferecer também a possibilidade de realizar fóruns temáticos e grupos de discussão. No que se refere ao último pilar, os serviços, o portal do colaborador, o Sábio éPT! e o SMS corporativo continuam a estar disponíveis. Os novos serviços a integrar serão as aplicações de negócio consoante cada empresa, a gestão de projectos bem como o *helpdesk on-line* (este já em funcionamento). Com o novo éPT! o objectivo é dar valor ao seu tempo. Agora venha conhecê-lo. é

*Bernardo Rodrigues*
*bernardo.s.rodrigues@telecom.pt*

*Mais apelativo e funcional: dois atributos que se destacam de imediato no novo portal éPT!*

**Annex 18 – Group Culture, éPT! magazine, special number "Inovar, mudar, melhorar", 2005**

Miguel Horta e Costa | E N T R E V I S T A

# Cultura de grupo
# Serviço ao cliente

Cultura de grupo, trabalho de equipa, sinergias e coesão. Estas são, para Miguel Horta e Costa, palavras-chaves do seu mandato. "Em nenhuma empresa os resultados acontecem sem uma estratégia bem definida, concretizada no trabalho de equipa. A liderança da Portugal Telecom é fruto de uma estratégia consciente e bem executada"

>> Miguel Horta e Costa
>> Presidente Executivo
>> 2002-

*por Rute Sousa Vasco*
*rute.s.vasco@telecom.pt*

Quando chegou a número 1 da Portugal Telecom, em Julho de 2002, o actual presidente executivo assumia a liderança de uma casa que conhecia bem. "Como CEO, uma das minhas primeiras preocupações centrou-se no modelo de governo do negócio. Assumimos então um modelo de gestão dos negócios simplificado, acabámos com um conjunto de *subholdings* e estruturas intermédias. Passámos a debater, a analisar e a planear a empresa como um todo coeso e integrado", refere Miguel Horta e Costa.

No terreno, a eficiência foi assumida como a prioridade. Da criação de unidades de serviços partilhados (como a PT PRO), à centralização de compras (com a PT Compras) e à própria reestruturação da PT Comunicações, foram dados passos para tornar o grupo mais eficiente. "Paralelamente, e quando a crise era o fantasma que assombrava todos os negócios, tivemos a coragem de encetar um programa de reestruturação financeira determinado e audaz. É a nossa situação financeira que nos permite hoje sonhar e ter ambições", observa.

Ao nível dos negócios, a inovação, um eixo estratégico no Grupo PT, voltou a dar frutos. O lançamento em antecipação ao resto do mercado da terceira geração móvel, a expansão da digitalização no cabo, o lançamento do VoIP pelo Sapo, a implementação do Wi-Fi são marcos dos últimos três anos, espelhados na realidade brasileira. Da concretização da *joint-venture* com a Telefónica, em 2002, resultou o lançamento e implementação da Vivo, hoje o maior operador de telecomunicações móveis do Brasil e da América Latina e o quarto maior a nível mundial.

O profundo processo de reestruturação da oferta do serviço fixo foi outra das frentes de referência no mandato de Miguel Horta e Costa que, em Janeiro de 2004, assumiu também a presidência executiva da PT Comunicações. No negócio de voz, a PT Comunicações lançou um conjunto de planos de preços e de novos serviços e oleou a máquina de acordo com um desígnio muito claro para todo o Grupo PT. "Ainda em 2002, quando me desloquei a Nova Iorque para a cerimónia de abertura da Bolsa, ela própria um indicador interessante de como o mercado internacional e os investidores olhavam para a Portugal Telecom, participei num conjunto de eventos que me fizeram reflectir sobre o futuro empresa. Ficou claro nessa viagem que o paradigma do negócio estava a mudar e que tínhamos de agir de forma rápida e incisiva. Tomei aí a decisão de passar o negócio de internet (PTM.COM) da PT Multimédia para a PT Comunicações. Esta decisão foi tomada numa altura em que a quebra do fixo ainda não era um tema em destaque como mais tarde veio a acontecer. Como hoje já se tornou claro para todos, o ADSL é o elemento revitalizador do negócio fixo, uma aposta que a Portugal Telecom teve a coragem de fazer em antecipação face a muitos concorrentes."

No ano em que completa 10 anos sobre a sua privatização, a Portugal Telecom conta com 43 milhões de clientes, opera em todos os continentes e é um agente comprometido com a mudança, inovação e melhoria da vida das comunidades em que se insere. Para o actual presidente executivo, essa é a grande conquista. "Somos a empresa nacional com maior projecção no mundo. Este é, sem dúvida, um motivo de orgulho muito especial. O *top five* do negócio móvel mundial fala português e isso acontece por causa da Portugal Telecom." é
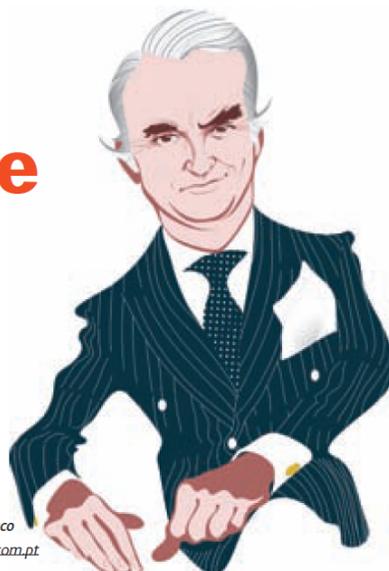
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## Annex 19 – Article about PRO UNO, éPT! magazine, nº 3, September-October, 2003



"O sistema SAP é um edifício estruturado que tem todos os pisos em open space. As infraestruturas básicas já estão instaladas, mas cada ocupante tem liberdade de adaptação do espaço às suas necessidades", exemplifica Paulo Leite.

A adopção do novo sistema será faseada no tempo. Precisamente porque, como refere o responsável do PRO Uno, "o primeiro grande obstáculo é a gestão do tempo". Ou seja, como passar dos sistemas antigos para o sistema novo sem causar disrupção.

O primeiro grande momento irá acontecer em Janeiro de 2004 – os sistemas de processamento de salários da TMN e do universo Lusomundo serão transpostos para o PRO Uno.

Uma das valências mais interessantes do PRO Uno – para alémda uniformização de processos para todos os que trabalham no backoffice do Grupo – diz directamente respeito ao colaborador ao nível individual. Porque nesta plataforma será inserida uma ferramenta designada por portal do empregado que vai permitir aos colaboradores acederem online, através do InSapo, casa-mãe do PRO Uno, a funcionalidades como marcação de férias, alteração de morada, justificação de faltas, etc.

A segunda fase do projecto acontecerá em 1 de Março de 2004, altura em a PT PRO irá aderir ao PRO Uno. Dar armas ao guerreiro é como se poderá classificar esta etapa, atendendo a que residem na PRO os colaboradores que mais utilizarão, no seu dia-a-dia profissional, o novo sistema.

**GERAÇÃO éPT!**

## Parceiros PRO Uno

O projecto PRO Uno tem o alto patrocínio de dois membros da Comissão Executiva da Portugal Telecom, Zeinal Bava, na qualidade de presidente do conselho de administração da PT PRO, e Paulo Fernandes, enquanto presidente da PT-Sistemas de Informação. As duas empresas desempenham um papel determinante em todo o projecto, funcionando como motor de todas as iniciativas em curso.

Atendendo à multiplicidade de áreas de actuação, foi escolhido um conjunto de entidades para dar acompanhamento às várias etapas do projecto.

A saber:
**Delloite & Touche** – gestão da mudança
**Accenture** – definição de processos
**KPMG** – quality assurance
**HP** – parceiro tecnológico

*Nesta etapa existe um grupo de key-users (...) que irão trabalhar com a PRO Uno, cujo papel é fundamental. Estamos a falar de cerca de 250 pessoas de um total de 5500 profissionais distribuídos maioritariamente pelas três maiores empresas (PT Comunicações, TMN e PT Multimedia)*

**Paulo Leite**
Director de Unidade na PT-SI e responsável pelo projecto PRO UNO

Em Abril de 2004 será a vez de todos os processos da PTC transitarem para o novo sistema. Da gestão de frotas à gestão de equipamentos nas lojas ou à marcação de férias, tudo passará a estar residente no PRO Uno. TMN e TV Cabo juntam-se a 1 de Junho, seguindo-se todas as outras empresas em Setembro de 2004. O ciclo fecha-se a 31 de Dezembro de 2004 com a entrada no sistema da Lusomundo Media e da Lusomundo Audiovisuais.

### Aprendizagem contínua

Os profissionais que diariamente utilizarão o PRO Uno no desempenho das suas funções serão alvo de uma atenção especial. A formação é também aqui uma palavra preciosa e está previsto um detalhado programa de formação presencial e em regime de e-learning. Com uma ressalva, alerta Paulo Leite: o conteúdo destas acções não é propriamente uma novidade para o grupo de profissionais envolvido. "Não estão a tirar a carta pela primeira vez; é um upgrade, porque já trabalham com o sistema SAP há algum tempo". O mais importante é mesmo a definição dos novos processos de trabalho, uma vez que foi a este nível que o grupo verificou que é possível melhorar.

Nesta etapa, existe um grupo de key-users, dentro deste universo de profissionais que irão trabalhar com o PRO Uno, cujo papel é fundamental. Estamos a falar de cerca de 250 pessoas de um total de 5500 profissionais distribuídos maioritariamente pelas três maiores empresas (PT Comunicações, TMN e PT Multimedia). Em cada uma destas empresas e também na PT PRO por ser o back office comum a todas, existe a figura do coordenador do PRO Uno: Filipe Rodrigues, na PTC, Carlos Soares, na TMN, Carlos Palito, na PTM, e Manuel Alfredo, na PT PRO são o elo de ligação com as empresas. "A expectativa é que sejam os nossos evangelistas", acentua o coordenador do projecto.

Para os colaboradores em geral, as mudanças serão sentidas de forma gradual. Que tipo de mudanças irão ocorrer? A 1 de Janeiro de 2004 nasce o Portal do Empregado, uma ferramenta do PRO Uno que permitirá aos colaboradores realizarem online uma série de operações, desde pedir certidões de IRS, marcar férias, consultar folha de vencimento. "No futuro, queremos que o portal do empregado seja a porta de entrada para todos os processos, como despesas de serviço, requisição de economato, etc", acrescenta Paulo Leite. Paralelamente, com o novo sistema será possível atribuir um número único de colaborador, medida que potencia a mobilidade e a simplicidade de processos.

Tudo isto no ambiente do InSapo, uma vez que o portal corporativo do Grupo PT será a casa do projecto PRO Uno. A informação quer ao nível de cada uma das empresas, quer ao nível do grupo é uma prioridade. "Há um grande esforço de comunicação no sentido de tornar evidentes as vantagens do PRO Uno para o colaborador", frisa Paulo Leite. É com este objectivo em mente que está já em desenvolvimento um canal informativo no InSapo, estando também a ser preparados conteúdos específicos de formação no Campus PT, utilizando nomeadamente a plataforma de e-learning com tecnologia da PT Inovação.

*por Rute Sousa Vasco*

## Annex 20 – Article about the launch of OPEN, éPT! news, 2009
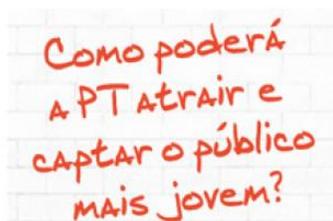


23-03-2009
**Aceite o desafio OPEN (actualizado)**
***"Como poderá a PT atrair e captar o público mais jovem?"*** Este é o primeiro desafio do OPEN. O programa que é hoje lançado e que foi desenhado para desenvolver uma cultura de inovação em toda a organização e transformar cada colaborador num inovador. A iniciativa foi apresentada por Zeinal Bava a administradores, directores de primeira linha e trainees, no Fórum Telecom. Conheça o site OPEN e descubra este Programa. Aceite o desafio

Reportagem PT TV

Notícia_Expresso_21 de Março

A partir de hoje, inove e partilhe as suas ideias. Participe e faça parte da mudança. Está aí o Programa OPEN. Uma iniciativa transversal a toda a organização que exige o compromisso de todos. Desenhado para transformar cada colaborador num inovador, o programa vai alastrar uma cultura de inovação às diversas áreas da empresa, em busca de crescimento e diferenciação.

Através de um conjunto de actividades, desde a partilha de ideias e sugestões, passando pela participação em sessões de formação, vamos desenvolver competências que vão permitir construir o futuro do Portugal Telecom.

Conheça o mundo OPEN

Uma das principais actividades do Programa OPEN consiste no lançamento de desafios regulares para estimular o nosso poder criativo. É através do Mercado de Ideias que vamos dar resposta a esses desafios. Mas atenção, não se pretende que o Mercado de Ideias seja "uma caixa de sugestões". O objectivo é contribuir de forma construtiva e planeada para este projecto.

**O primeiro desafio OPEN**

O primeiro desafio OPEN está lançado: **"Como poderá a PT atrair e captar o público mais jovem?"**. Contribua já com as suas ideias no Mercado. Aceda ao site OPEN.

Além de responder aos desafios regulares lançados pela PT, pode contribuir com outras ideias de valor para a empresa. Não se esqueça que, ideias originais, simples e importantes podem ser pensadas por qualquer um de nós e que pequenas soluções podem fazer toda a diferença.

Participe:

- Coloque ideias no Mercado de Ideias
- Invista em ideias. Terá uma carteira com 5.000 opens para investir nas ideias que considera mais relevantes para a empresa.
- Comente construtivamente nos fóruns de discussão. Acrescente valor às ideias disponibilizadas.

E porque o OPEN é um Programa de todos e para todos, vamos aprender mais sobre inovação. A PT vai promover um plano de formação que envolverá sete mil colaboradores.

Juntos, vamos fazer com que este programa seja um sucesso. Só tem a ganhar com a sua participação. Poderá trocar os opens obtidos com os seus investimentos, ver reconhecidas as suas ideias e fazer parte do Quadro de Honra do OPEN.

**"Queremos industrializar a inovação"**

O Fórum Telecom, em Lisboa, foi palco para a revelação do Programa OPEN. Em encontro marcado para o final de 18 de Março, Zeinal Bava apresentou o projecto a administradores e primeiras linhas das empresas PT bem como aos cerca de 140 jovens que frequentam o programa trainees.

Zeinal Bava, presidente executivo da PT, apresentou o Programa OPEN

A inovação faz parte do ADN da PT e está, desde sempre, presente na empresa. O lançamento do primeiro cartão pré-pago Mimo e do portal móvel multimédia (i9 e Vivo Play) pioneiro a nível mundial, do picoDSLAM (que transformou Portugal no 4º País do mundo com cobertura integral de banda larga) e as centrais automáticas (Portugal foi o 1º país europeu a automatizar toda a rede telefónica) são apenas alguns exemplos que demonstram que a Portugal Telecom está sempre um passo à frente. "Somos a empresa que mais investe em inovação em Portugal", confessou o presidente executivo da PT.

A inovação é uma prática que tem que estar presente em todos os nossos passos. O mundo em constante mudança requer a busca de novas formas de actuação e de oportunidades únicas. Superar expectativas, vencer fronteiras, reinventar regras, promover a diferença e aprender fazem também parte da nossa missão. Ao envolver-se no Programa OPEN, vai acrescentar valor a si próprio, ao seu trabalho e à sua empresa.

eficientes, antecipar e capturar novas oportunidades. Pretende-se que "este programa seja mais um contributo para que 2009 seja o melhor ano de sempre da PT".

"Temos que ser actores e não meros espectadores", independentemente do lugar que cada colaborador ocupa na hierarquia. "A nossa missão tem que ir para além da mera entrega de resultados". A inovação não pode ser um exclusivo da PT Inovação. "Queremos industrializar a inovação na empresa, em que todos e cada um de nós é um actor e participa na inovação. Para isso, temos que atacar alguns dos mitos". E quais são esses **mitos**?

- "As melhores ideias vêm apenas do I&D"
- "A inovação é só em novos produtos e tecnologias"
- "A inovação não pode ser ensinada"
- "A tomada de decisão deve ser centralizada só em alguns"
- "Maior experiência e senioridade é sinónimo de melhor inovação"



Um dos aspectos fundamentais do programa está relacionado com a criação de mais tolerância em errar, arriscar, tomar decisões e corrigir. Segundo Zeinal Bava, "a razão pela qual os americanos têm mais sucesso é porque não têm medo de falhar".

Durante o encontro, o CEO da PT falou ainda dos desafios que se impõem à empresa, dos resultados obtidos no 4º trimestre de 2008 e da questão do investimento. "O investimento vai potenciar o nosso negócio. Através do investimento é que as empresas vão conseguir lidar com este enquadramento económico difícil" e são quem tendem a recuperar mais rapidamente nos períodos de crise.

"O nosso desígnio é só um: crescer a nossa empresa". O objectivo da PT é crescer em todos os mercados em que marca presença. "Somos a única verdadeira multinacional portuguesa. Temos mais de 70 milhões de clientes e temos negócios em mais de 14 países." O CEO da operadora reforçou que a empresa não quer ser Nº2 em nenhum mercado mas sim liderar todos os segmentos.

**Annex 21 – Article about éPT! card, éPT! magazine, nº 1, April-May, 2003**



- Oferta da instalação na adesão à TV Cabo e de três mensalidades na adesão à Sport TV, Telecine, Disney e outros canais premium.
- 36% de desconto no Serviço Parabólica Mágica.
- Grátis Kit Netcabo e primeira mensalidade / Grátis a primeira anuidade da TV Interactiva.
- Oferta da Assinatura anual do telefone fixo + 38,20 euros em chamadas.
- 20% de desconto na compra do PT Free e do PT Conforto Gold.
- Oferta do PT 1ª Vez e Grátis o Kit Sapo ADSL + Instalação.

- 50% de desconto em todos os planos de assinatura TMN e na aquisição de um de três telemóveis: NOKIA 7650, NOKIA 3510 e Siemens A36.
- 32% de desconto nos cinemas Lusomundo e Warner-Lusomundo, em bilhetes para duas pessoas, todos os dias da semana.
- 30% de desconto em livros editados pela Editorial Notícias e na assinatura do Diário de Notícias, Jornal de Notícias, Grande Reportagem, Volta ao Mundo, National Geographic e outras revistas da PressMundo.
- 33% de desconto no Jornal 24 Horas.

São estas as vantagens iniciais do éPT!, criado para reforçar os sentimentos de pertença dos colaboradores ao Grupo Portugal Telecom. Pretende-se que seja a plataforma para o futuro lançamento de produtos e serviços das empresas em condições únicas para os colaboradores do Grupo, bem como o suporte para integrar possíveis futuras vantagens negociadas com parceiros externos do Grupo PT.

'Criamos o cartão de colaborador no ano em que afirmamos a cultura do nosso Grupo e em que criamos novos suportes de comunicação interna, com o objectivo de transmitir a todos os colaboradores a satisfação de pertencer a uma grande e mesma família, o Grupo Portugal Telecom", refere o Presidente Executivo, Miguel Horta e Costa,

a propósito da criação do cartão éPT!. O cartão corporiza a consciência que se pretende transmitir a todos os colaboradores e respectivas famílias de um Grupo, formado por várias empresas, presentes em diversas áreas de negócio, mas unido nas mesmas vantagens e na mesma vontade de afirmar uma cultura.

"Crescermos e criarmos valor como Grupo passa também por dar-mo-nos a conhecer aos nossos colaboradores, através das vantagens possíveis no nosso universo empresarial, envolvendo-nos todos com todos", sublinha Miguel Horta e Costa.

O cartão éPT! não implica qualquer custo para os colaboradores da empresa, sendo apenas necessária a adesão ao programa, que será feita voluntariamente, através do preenchi-

mento do formulário de adesão que chega ainda este mês a casa de todos os colaboradores abrangidos.

Nesta fase inicial, só estarão abrangidos os colaboradores no activo pertencentes ao quadro de empresas e respectivas participadas, com sede em Portugal e em que o Grupo PT detenha o controle de gestão e/ou uma participação no capital social superior a 50%.

O portal corporativo Insapo funcionará como suporte de apoio a todos os eventuais esclarecimentos no âmbito do programa. Com o mesmo propósito foi criada uma linha verde de apoio telefónico – 800222555 - disponível em horário laboral.

Agora é só preencher o pedido de subscrição, esperar uns dias e usufruir todas as vantagens do mundo PT.

abril/maio 2003 |

## Annex 22 – Article about the launch of OPEN star, May of 2011
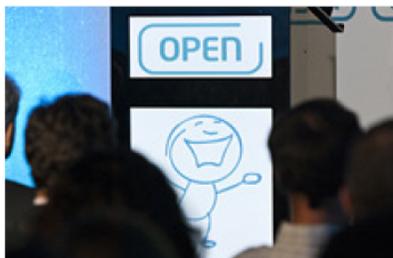
03-05-2011                                                              97
**Dois anos depois, a PT está mais OPEN**
Contam-se dois anos desde que a PT assistiu ao lançamento do Programa Open. O momento é de renovação, por isso, numa sessão em que foi dada a conhecer à organização uma nova imagem, um novo website e novas iniciativas, foi tempo também de fazer o balanço da evolução do tema da inovação na PT. A sessão decorreu a 2 de Maio, em Lisboa, e foi transmitida para todos os colaboradores através de webcast.

**Veja aqui o vídeo OPEN**

**Veja aqui a reportagem PT TV**

**Consulte o novo site Open**

**Para atribuir um OPEN star clique aqui**

Zeinal Bava começou por salientar que o Programa OPEN é efectivamente representativo de uma mudança de atitude à volta do tema da inovação, susceptível de dotar a empresa da flexibilidade necessária para concorrer no mercado de uma forma diferenciadora. E as primeiras referências foram precisamente para a missão que tanto a PT Inovação, como o Sapo assumem neste contexto.

Mas a missão de inovar não é apenas de alguns. O compromisso é de todos e foi precisamente esta atitude e esta transversalidade que o OPEN veio criar na empresa. Quando a atenção é posta nos dois anos deste programa, Zeinal Bava destaca a evolução que o grupo viveu na avaliação face aos mitos da inovação, tornando-o mais pró-activo a este nível.

A abordagem do programa, de acordo com um horizonte temporal, permitem à PT alavancar esta temática de uma forma estruturada. Falamos, portanto, das três fábricas em que é estruturado o OPEN. O presidente executivo relembrou que, ao nível da Fábrica Incremental, melhoria contínua são palavras de ordem, em termos de projectos e processos. No contexto da Fábrica Planeada, salientou o importante papel desempenhado pela PT Inovação e as vantagens da empresa estar mais perto dos segmentos de negócios, a par da capacidade que a empresa tem demonstrado para fazer roadmaps de inovação. Finalmente, ao nível da Fábrica Exploratória, com um horizonte temporal de 3 a 5 anos, o objectivo passa por continuar a implementar projectos, sendo esta a forma mais avançada de trabalhar a inovação, refere.

De acordo com Zeinal Bava "o programa amadureceu, ganhou vida própria" e é simbólico da capacidade criativa e de execução operacional

De acordo com Zeinal Bava "o programa amadureceu, ganhou vida própria" e é simbólico da capacidade criativa e de execução operacional. Neste sentido, Ana Dias, responsável pela Direcção de Gestão da Inovação, agradeceu a todos os colaboradores que directa ou indirectamente contribuem para que a inovação seja estimulada, destacando a importância do envolvimento de toda a organização no OPEN.

**OPEN envolve colaboradores reconhecendo o mérito**
O programa OPEN assinalou também o lançamento de um novo website, com uma nova imagem e funções reforçadas, com a colaboração da Direcção de Comunicação e Imagem Corporativa. O novo website, que está integrado no éPT!, reflecte a abrangência, transversalidade e transparência do programa de inovação.

Ana Dias agradeceu a todos os colaboradores que directa ou indirectamente contribuem para que a inovação seja estimulada

"Para abrir um espaço para celebrar grandes projectos", Zeinal Bava anunciou a criação de uma nova iniciativa – o OPEN Awards – que prevê que sejam reconhecidos projectos já implementados e com resultados observáveis em 2010 e 2011. Na prática foram definidas quatro categorias em linha com os objectivos estratégicos da PT, no âmbito das quais poderão ser inscritos projectos – eficácia e eficiência organizacional, produtos e serviços, sustentabilidade e experiência do cliente.

Em cada uma das categorias serão distinguidos três projectos e, entre estes, eleito o melhor. Dentro de algumas semanas, as inscrições serão abertas. Os vencedores serão conhecidos no final do ano, na tradicional Festa de Natal da PT.



Paralelamente, surge o OPEN star, uma forma de reconhecimento a 360º que permite que qualquer colaborador PT, de modo autónomo e imediato, identifique, reconheça e dê visibilidade aos seus colegas (para atribuir um OPEN star clique aqui).



Zeinal Bava explicou que todos os colaboradores passam a ter 12 estrelas para atribuir a colegas que tenham superado expectativas no desenvolvimento de um projecto, na disponibilidade que demonstraram para colaborar, pela atitude ou forma de estar positivas. O presidente executivo atribuíu as duas primeiras OPEN stars a Celso Martinho, do SAPO, e a Bernardo Cardoso, da PT Inovação, pelo desenvolvimento do MEO Remote.

As novidades não se ficaram por aqui. Com o intuito de tornar o diálogo sobre inovação mais aberto, Ana Dias anunciou a criação da OPEN Team, constituída por um conjunto de embaixadores espalhados pela organização, cuja missão é a de promover a inovação no dia-a-dia da empresa.

Adicionalmente, foram também identificados Opinion Leaders, colaboradores que se destacaram na participação no Mercado de Ideias e que têm vindo a ter um importante papel ao nível da auto-regulação do mesmo.

A sessão contou, ainda, com a participação de diversos colaboradores de áreas distintas. Em foco estiveram projectos em fase de planeamento ou desenvolvimento que têm como máxima a inovação.

## Annex 23 – Article about the launch of OPEN awards, May of 2011

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**OPEN awards distinguem projectos de excelência**
Chegaram os OPEN awards, a iniciativa que vai distinguir o talento, competência, criatividade e capacidade de concretização da Portugal Telecom. Lançados com o objectivo de reconhecer e disseminar projectos e trabalhos excepcionais, os OPEN awards retribuem o empenho dos colaboradores na superação dos desafios propostos pela empresa, disseminando boas práticas junto de toda a organização.

Os OPEN awards são uma iniciativa conjunta da Direcção de Gestão da Inovação e da Direcção de Comunicação e Imagem Corporativa e pretendem difundir projectos e trabalhos, cuja implementação contribua para a conquista dos cinco objectivos estratégicos da PT:

- atingir 100 milhões de clientes;
- gerar dois terços das receitas no mercado internacional;
- liderar em todos os segmentos e geografias onde opera;
- situar-se no 1º quartil de retorno accionista, resultados operacionais e financeiros;
- ser uma referência sectorial na sustentabilidade ao nível social, económico e ambiental.

A partir de agora, e até 31 de Julho, os colaboradores das empresas PT podem inscrever projectos e iniciativas já implementadas, com resultados observáveis em 2010 e 2011, e que se enquadrem nas categorias: eficácia e eficiência organizacional, produtos e serviços, sustentabilidade e experiência do cliente e redes e sistemas. Em cada uma das categorias serão distinguidos três projectos e, entre estes, eleito o melhor. De salientar que, os doze trabalhos finalistas serão apresentados a toda a organização e colocados à votação online na intranet éPT!. A votação dos colaboradores terá um peso de 25% na avaliação final e os restantes 75% serão definidos pela apreciação do grande júri.

Para participarem, os colaboradores ou as equipas de projectos devem inscrever o seu caso, através do formulário de inscrição disponível no site OPEN. Para mais informações devem aceder ao regulamento.

Os vencedores dos OPEN awards serão divulgados no final do ano.

**Annex 24 – Benefits Dependency Network data**

Table 12: Business Drivers

| ID | Driver | Type | Justification |
|---|---|---|---|
| D1 | Commercial Brands Mosaic | External | In the history of PT Group companies and their brands are built over the years, especially through the acquisition, which are not merged thereafter remaining independent (Seruya, 2008 p. 55). |
| | | | The PT Group presents with a mosaic of unrelated distinct brands (TV Cabo, Sapo, Telepac, TMN, PT Comunicações, PT Wi-Fi). Most designations do not even allow disclosing membership PT (Seruya, 2008 pp. 55-56). |
| | | | Each of these brands is supported by distinct groups of employees who live their own brands in a special way. They feel solely responsible for their success and these brands mean to them the commitment to an organizational reality with clear and even physical boundaries, sometimes (the organization's headquarters) and not to PT Group (Seruya, 2008 p. 56). |
| D2 | Cultural mosaic (distinct stories and businesses) | Internal | The PT Group is defined as a mosaic, an adequate metaphor for an organization that was created and has evolved as an assembly of several parts (activities, enterprises, strategic goals, brands, technological know-how and commercial, etc.). Is a cultural mosaic and output in particular the assembly of disparate activities and companies with disparate stories (Seruya, 2008 p. 57). |
| | | | Great heterogeneity of firms, in terms of objectives, stories, professional groups, business cultures. Because of their origins and contexts of market maturity levels and their activities are of particular identities, clearly distinct from each other (Seruya, 2008 p. 61). |

| ID | Driver | Type | Justification |
|----|--------|------|---------------|
| D3 | Heritage Monopoly, "Fixed", State | External | At its foundation, the PT Group inherits a traditional activity, fixed, which is still a monopoly but will disappear in the short term (Seruya, 2008 p. 47).<br><br>The idea that fixed cannot survive anchored in the traditional paradigm of activity can increase its importance if "reinvented" and associated with other telecom activities (Seruya, 2008 p. 48).<br><br>"Reinventing fixed" is part of the "official voice" of internal documents of the holding company shall refer to changes in the telecom sector, and in particular the role that is attributed to PT. This "Reinvention" also means the development of new activities that the company has never touched and this rejuvenation of activity, change positioning, is evident in the technological dynamism of the market that is fixed on his own in the 2000s (Seruya, 2008 pp. 48-49). |
| D4 | Privatization scenario, multiple shareholders | External | The admission to Exchange Markets enhances the visibility of the Group and contributes to the pressure on the administration of the holding company and the expectations of shareholders. Media exposure is in the last ten years an important factor in the construction of perceptions of the identity of the Portugal Telecom Group (Seruya, 2008 p. 51).<br><br>Increasing and expected pressure from investors around dividend distribution to shareholders will be an important lever in driving strategy and activity of the company. While revealing an attitude of shareholders whenever most influential and interventionist, which requires greater flexibility in the management of the company (Seruya, 2008 p. 50).<br><br>Capital distribution by geographic origin confirms the identity as dispersion characteristic of the shareholder, suggests a portfolio of interests in various positions in terms of the investment strategy (Seruya, 2008 p. 50). |

| ID | Driver | Type | Justification |
|---|---|---|---|
| D5 | Internationalization scenario (Brazil and Africa) | Internal | It's the launch of 'VIVO' (the brand has become synonymous, at the time, to the largest mobile company in South America) that pushes the inner consciousness, in Portugal, on the extent of the Group. The act of creating a brand, with the investments and risks, to strengthen the ability to compete in a huge market like the Brazilian market, provides all the Group an idea of size and power, which is not comparable to the organization in Portugal although used to be a leader and making one of the largest economic groups in the country (Seruya, 2008 p. 53). |
| | | | At the international level, PT Group also advances to Africa and Asia. This increased experience in terms of internationalization challenges PT Group abilities to manage in the system of joint ventures, social, technological and commercial realities distinct from that the Group has in Portugal (Seruya, 2008 p. 53). |
| D6 | Diversification of activities | Internal | The diversification of activities and organizational matrix (considering the PT holding, 6 instrumental enterprises, 4 enterprises related to Wireline, 2 enterprises related to Wireless, 1 holding and 4 enterprises related to Multimedia and 10 international enterprises) highlights the strategic positioning and organizational profile which helps to further define the identity PT, and contextualize the emergence of internal brand (Seruya, 2008 p. 54). |

Table 13: Business Objectives

| ID | Description | Justification |
|---|---|---|
| O1 | Group synergies – integrated view of the customer with cross opportunities | New goals, a new attitude: an integrated perspective of the customer is a pillar of the new strategy of Portugal Telecom Group. Because PT is only one, a new attitude is important. |
| | | The official brochure "éPT! Investor Day 2003" concludes that integrating for market leadership (means that) the future |

| ID | Description | Justification |
|---|---|---|
| | | of Portugal Telecom is in maximizing the synergies between all Group companies (Seruya, 2008 p. 69), (Annex 18 – Group Culture, éPT! magazine, special number "Inovar, mudar, melhorar", 2005). |
| **O2** | New corporate culture | Focus on customers, established by the new administration of the Group as strategy involves a whole new organizational culture, cross the Group (Seruya, 2008 p. 67). |
| | | Miguel Horta e Costa refers that "More important than finishing the dispersion of cultures was to create a new culture, young, dynamic, of a company determined to lead and that wants to affirm itself both nationally and internationally" (Seruya, 2009 pp. 5, 7). |
| | | With the new model in place, communication was changed into a management tool that generates cohesion, adds value and contributes decisively to the creation of a strong group culture. – Zeinal Bava in the preface of "éPT! a marca interna da Portugal Telecom" (Seruya, 2009 p. 6). |
| | | Miguel Horta e Costa refers to the éPT! brand as a result of a strategic option based on transversality and sharing knowledge, competences and resources (Seruya, 2009 p. 7). |
| | | (Annex 18 – Group Culture, éPT! magazine, special number "Inovar, mudar, melhorar", 2005) |
| **O3** | Internal coherence and cohesion | In strategic terms, upon his appointment in 2002, the aim of the new administration of the PT Group is primarily coherence: must clear the "confusion" (Miguel Horta e Costa) on the concept of Group recorded internally. In their view, the idea of group among employees is "blurred" (Miguel Horta e Costa) (Seruya, 2008 p. 71). |
| | | In the strategic plan is also cohesion: it is to build the "union" employees around the Group's strategy, which strategies inherent in each business activity and must report. Diversification is a striking feature of the history of the PT Group. Cohesion between its various activities and services, distributed between organizational "silos" employees, must |

| ID | Description | Justification |
|---|---|---|
| | | manage to create more positive results of the entire Group (Seruya, 2008 p. 72). |
| | | With the new model in place, communication was changed into a management tool that generates cohesion, adds value and contributes decisively to the creation of a strong group culture. – Zeinal Bava in the preface of "éPT! a marca interna da Portugal Telecom" (Seruya, 2009 p. 6). |
| | | (Annex 18 – Group Culture, éPT! magazine, special number "Inovar, mudar, melhorar", 2005) |
| **O4** | Strategic alignment of each company with the group | "PT is one" and "transform the group commercial machine" are guidelines involving alignment and total cooperation strategies of each company, customer strategies (...), with consequences for the commercial work (Seruya, 2008 p. 68). |
| | | The choice of an "internal brand" is actually based on a single goal: to contribute to the entrenchment of organizational identity group, which is managed with the ultimate intention to align employees on the Group Policy (Seruya, 2008 p. 87). |
| | | (…) involving alignment and total cooperation strategies of each company, customer strategies (...), with consequences for the commercial work (Seruya, 2008 p. 68). |
| **O5** | Group operational synergies | Miguel Horta e Costa refers in "the group has the objective of moving decisively capturing operational synergies between companies" (page 26, Annex 13 – éPT! magazine, nº 5, 2004). |
| | | (Annex 18 – Group Culture, éPT! magazine, special number "Inovar, mudar, melhorar", 2005) |

Table 14: Business Benefits

| ID | Description | Justification |
|---|---|---|
| **B1** | Increase results | Transform the group into a "commercial machine" (…) |

| ID | Description | Justification |
|---|---|---|
| | | Cohesion between the various activities, services and employees of distinct organizational "silos" must be created in order to generate more positive results of the entire Group (Seruya, 2008 pp. 68, 72). |
| **B2** | Increase employee motivation | "motivation is one of the major gains" Miguel Horta e Costa in Visão magazine, 29th January, 2004 (Annex 14 – Visão magazine, 29th January, 2004). |
| **B3** | More and better services | "The internal brand allowed the re-found corporate rites and the opening to a new era, also of communication, where technology allows, everyday more, shortening distances, moving people near to management, potentiate ideas and the process of ideas generation to develop more and better services to our customers." – Zeinal Bava in the preface of "éPT! a marca interna da Portugal Telecom" (Seruya, 2009 p. 6). |
| **B4** | Up-to-the minute corporate communication | (…) we built an online communication platform that, for the first time, has put the whole group in contact up-to-the-minute (...), Miguel Horta e Costa in the editorial of the first magazine éPT! (Annex 3 – Editorial, éPT! magazine, nº 1, April-May 2003) |
| **B5** | Consistent communication | In internal document "A Comunicação como Ferramenta de Gestão", Abílio Martins refers to Corporate Communication as a tool based on consistent, clear and ethical values (Martins, 2002). |
| **B6** | Valuation of human capital | In the Editorial of the 3rd number of éPT! Magazine, Miguel Horta e Costa refers: It's the cooperation – between teams, between companies and between employees – that allows Portugal Telecom to achieve the excellence levels that received awards make evident (Annex 4 – Editorial, éPT! magazine, nº 3, September-October 2003). |
| **B7** | Cost reduction | PT PRO and PT Compras are two transverse Group 'back-office' companies, created in 2003 to support the Group and growing synergies and to reduce structural costs (Seruya, |

| ID | Description | Justification |
|---|---|---|
| | | 2008 p. 157). |
| **B8** | Productivity increase | PT PRO and PT Compras exist for the PT companies involved in the market to focus on business and customers without spending their energies with the organizational processes that are not "core." (Seruya, 2008 p. 157). |
| | | "Continuous improvement of productivity made through optimization of processes" (Portugal Telecom, 2003). |
| | | "Redesign and standardization of all back office processes and procedures increasing its efficiency, verifiability and reliability" (Portugal Telecom, 2003). |

Table 15: Business Benefits relationship with objectives and changes

| ID | Description | Benefit Type | Benefit owner | Related objectives | Related changes |
|---|---|---|---|---|---|
| B1 | Increase results | Financial | Commercial Units | O1, O2, O4 | C4 |
| B2 | Increase employee motivation | Quantifiable | Corporative Human Resource Management | O2, O3 | C8, C10 |
| B3 | More and better services | Measurable | Product Management Units | O2 | C3, C4, C9 |
| B4 | Up-to-the minute corporate communication | Measurable | Corporate Communication | O2, O3 | C1 |
| B5 | Consistent communications | Observable | Corporate Communication | O1, O3, O4 | C1, C2 |
| B6 | Valuation of human capital | Measurable | Corporative Human Resource Management | O2 | C3, C9 |

| ID | Description | Benefit Type | Benefit owner | Related objectives | Related changes |
|----|-------------|--------------|---------------|--------------------|-----------------|
| B7 | Unification of processes | Measurable | Distinct Support Units (HR, Finance, etc.) | O3, O5 | C6, C10 |
| B8 | Cost reduction | Financial | Human Resources, PT PRO | O5 | C5, C6 |
| B9 | Productivity increase | Quantifiable | Corporative Human Resource Management, Each Business Unit | O5 | C6, C7 |

Table 16: Business Changes

| ID | Description | Justification |
|----|-------------|---------------|
| **C1** | Create corporate communication unit | In the end of 2002 the Group approved the creation of a "Central Office of Communications - CCC". <br><br> The CCC will evolve rapidly to the creation of a "Central Communication Unit", in the beginning of 2003, which will seat of the launch of the éPT! brand amidst profound changes in the governance of Portugal Telecom Group. <br><br> According to the initial definition of its role, the CCC is the "internal team responsible for coordinating network communication and a cohesive team, fast and aligned with the administration, capable of manage the information produced or to be produced within the PT Group". This office assigns tasks of the "collection of information from all sources of the Group, production editorial daily and continuous updating of the intranet. <br><br> (Seruya, 2008 p. 152) (Martins, 2002) |
| **C2** | Create communication network and information circuits | The CCC is the "internal team responsible for coordinating network communication and a cohesive team, fast and aligned with the administration, capable of manage the information produced or to be produced within the PT Group". This office assigns tasks of the "collection of |

| ID | Description | Justification |
|---|---|---|
| | | information from all sources of the Group, production editorial daily and continuous updating of the intranet. (Seruya, 2008 p. 152) (Martins, 2002) |
| **C3** | Promote collaboration and information sharing culture | Equipas éPT! promotes a group culture and sharing best practices (Annex 6 – éPT! first anniversary). The sharing of information and knowledge and the applications and services in the employee portal promote a common culture (Annex 10 – Ninth anniversary of the corporate intranet). Abílio Martins says "we want to change the corporate culture, going from 'save', where each one keeps the information to himself to 'upload', where practices are shared achieving knowledge broadcast and sharing" (Annex 12 – Launching Equipas éPT!, éPT! magazine nº 4 – Christmas special, 2003). |
| **C4** | Use ideas to improve and enlarge PT offer | "The internal brand allowed the re-found corporate rites and the opening to a new era, also of communication, where technology allows, everyday more, shortening distances, moving people near to management, potentiate ideas and the process of ideas generation to develop more and better services to our customers." – Zeinal Bava in the preface of "éPT! a marca interna da Portugal Telecom" (Seruya, 2009 p. 6). "In order to continue to surprise the market consistently with innovative services, we took important steps to reinforce our internal culture of innovation and risk–taking, as one of the main drivers of growth and performance at PT. We thus created the conditions for the development and sharing of new and differentiating ideas, involving the whole organisation in the innovation process of new products and services, business concepts, customer experience levers and operational efficiency improvements." (Portugal Telecom, 2008 p. 12) |
| **C5** | Improve internal | "Continuous improvement of productivity made through |

| ID | Description | Justification |
|----|-------------|---------------|
| | processes | optimization of processes" (Portugal Telecom, 2003). "Redesign and standardization of all back office processes and procedures increasing its efficiency, verifiability and reliability" (Portugal Telecom, 2003). |
| C6 | Create common services enterprises (PT PRO and PT Compras) | In the 2002 Investor day, PT presented as underway initiatives related with organization and human resources, the creation of shared services, focusing on functional areas (finance, accounting, wages' processing, etc.) and purchasing (Portugal Telecom, 2002). |
| C7 | Develop and promote self-service culture | Besides the creation of shared services and the convergence of information systems, employees will experience changes in a progressive way. With Employee Portal self service functionalities, employees will be able to perform several operations (related with wages' processing, holydays and absences, personal data, etc.) in a full self-service way (Annex 19 – Article about PRO UNO, éPT! magazine, nº 3, September-October, 2003). |
| C8 | Promote culture of recognition | Ana Allen Lima identified OPEN star and OPEN awards as enablers that promotion a recognition culture which awards those who are great performers and show distinctive behaviours. |
| C9 | Create Corporate Innovation Management team | The Corporate Innovation Management team was gathered in 2009, with the objective of leading the Innovation program OPEN and managing innovation processes. |
| C10 | Promote equal rights | Dalila Ribeiro Martins identified éPT! card project as a relevant area in the Corporate Intranet with the objective of promoting equal benefits to all PT employees. |

Table 17: Enabling changes

| ID | Description | Justification |
|----|-------------|---------------|
| **E1** | Implement corporate communication functionalities | Employee portal communication functionalities started with inSapo released in February of 2003 to support the Central Office of Communications – CCC. inSapo became éPT! in February of 2004, integrating the éPT! brand and assuming the main communication vehicle with employees. In November of 2009 éPT! assumed the role of unique corporate intranet with the phase out of remaining company intranets that ended in November of 2011. |
| **E2** | Implement collaboration functionalities | Employee portal collaboration functionalities started with the implementation of "Equipas éPT!" in November 2003 with main objectives of sharing knowledge (Annex 12 – Launching Equipas éPT!, éPT! magazine nº 4 – Christmas special, 2003). In May of 2005, Sábio was launched and considered the sharing of PT employee knowledge (Annex 16 – Sábio, éPT! magazine nº 12, 2006). Finally, in July of 2009 another big step towards collaboration. This time with the OPEN program which promoted the sharing of ideas by employees to improve internal processes and better and new services (Annex 20 – Article about the launch of OPEN). |
| **E3** | Perform innovation change management program (OPEN) | While the Innovation Management Unit launches the first challenges to collect employee ideas, an extensive change management program is performed. This change management program considers the involvement of top management (the first challenge is presented in March, 2009 by PT CEO, Zeinal Bava to the group administrators, directors and trainees) and training plan involving all employees (Annex 20 – Article about the launch of OPEN). |
| **E4** | Implement knowledge management functionalities | Employee portal collaboration functionalities became available with the implementation of Sábio website in May 2005 (Annex 15 – Sabio launch, éPT! magazine nº 11, 2005). There were other collaboration projects within the PT Group but we didn't considered them because they |

| ID | Description | Justification |
|----|-------------|---------------|
| | | were company initiatives and not corporate projects. |
| **E5** | Content Management training | inSapo, éPT!, SABIO and OPEN projects considered Web Content Management functionalities. Therefore all these project implementations were followed by training to the supporting teams. |
| **E6** | Plan and implement communication plan (manage change) | Seruya (2008, 2009) describes some of the change management initiatives preceding the launch of the employee portal. Some of these initiatives consider the usage of a mascot, distribution of stickers, the placement of banners in all internal websites and the involvement of top management in the portal itself (right after launch) but also in the magazine and through sms and video. |
| **E7** | Implement HR Employee self service Portal | Employee portal HR self service functionalities were implemented in September of 2004 (Annex 7 – Launching Employee self service portal). This project was included in the major program of unification of HR systems. |
| **E8** | Implement OPEN star and OPEN awards project | OPEN star and OPEN awards functionalities were implemented in May of 2011. This project considered implementing a badge system integrated with corporate active directory and content publishing and voting functionalities. |
| **E9** | Implement éPT! card website | éPT! card website was launched in April of 2003, along with the éPT! brand. |

Table 18: ICT enablers

| ID | Description | Justification |
|----|-------------|---------------|
| **I1** | Corporate Portal (now éPT!, formerly inSapo) | Corporate Intranet (formerly named inSapo and then éPT!) – acts as the entry gate for all employees in PT Group and considers functionalities of corporate communications and applications and tools. This corporate intranet was launched in February of 2003 under the name of inSapo and changed to éPT! in February of 2004. In November of |

| ID | Description | Justification |
|---|---|---|
| | | 2009 éPT! assumed the role of unique corporate intranet with the phase out of remaining company intranets that ended in November of 2011 (Annex 5 – Launching Employee Portal inSapo in 2003, Annex 6 – éPT! first anniversary, Annex 8 – Unique corporate intranet, Annex 9 – Timeline of Employee Portal related projects, until 2010, Annex 10 – Ninth anniversary of the corporate intranet, Annex 17 – The new éPT!, éPT! magazine nº 12, 2006). |
| I2 | Teams éPT! | Employee portal collaboration functionalities started with the implementation of "Equipas éPT!" in November 2003. With main objectives of sharing knowledge (Annex 12 – Launching Equipas éPT!, éPT! magazine nº 4 – Christmas special, 2003) this website considers collaboration functionalities based on web content management and interaction capabilities like blogs, forums, document sharing, etc.. |
| I3 | OPEN – innovation platform | The ideas market was the visible contact point of the extensive OPEN program with employees. Its main goal was to promote ideas sharing, supporting the innovation processes. The ideas submitted are commented and rated by all employees and the approved ones are analysed by the innovation management team and product areas. OPEN star consists on a recognition system where great performances and distinctive employee behaviours are acknowledged through the credit of a star badge (Annex 22 – Article about the launch of OPEN star, May of 2011). OPEN awards consists on content publishing and voting functionalities that will enable the annual championship between the relevant projects implemented in the ending year. These projects are submitted by the teams that worked on them and are voted by all employees (Annex 23 – Article about the launch of OPEN awards, May of 2011). |
| I4 | Sabio | Employee portal collaboration functionalities became available with the implementation of Sabio website in May |

| ID | Description | Justification |
|---|---|---|
| | | 2005. There were other collaboration projects within the PT Group but we didn't consider them because they were isolated company initiatives. |
| | | Knowledge Management and collaboration functionalities, gives access to market information, business and technology reports and trends. Latter allowed the sharing of contents produced by employees to all (Annex 15 – Sabio launch, éPT! magazine nº 11, 2005, Annex 16 – Sábio, éPT! magazine nº 12, 2006); |
| **I5** | Employee self service portal | This site provides access to HR approval processes (such as vacations, expenses and training), accessing salary payment details and updating personal information. |
| | | These employee portal HR self service functionalities were implemented in September of 2004 (Annex 7 – Launching Employee self service portal, Annex 11 – First anniversary of the Employee self service portal). This project was part of a major program of unification of HR systems. |
| **I6** | éPT! card website | This website considers presenting the portfolio of products and services that integrate corporate benefits package (Annex 9 – Timeline of Employee Portal related projects, until 2010, Annex 10 – Ninth anniversary of the corporate intranet, Annex 6 – éPT! first anniversary, Annex 21 – Article about éPT! card, éPT! magazine, nº 1, April-May, 2003). |