



WHITE PAPER

Building an Intranet Business Case

**A STEP-BY-STEP GUIDE TO ENSURING
THE BEST POSSIBLE OUTCOME FOR
YOUR INTRANET PROJECT**



ThoughtFarmer

Where Teams + Ideas Grow



WHAT'S INSIDE

So you have begun the journey of acquiring an intranet. You have done the research, and perhaps even identified your preferred intranet software vendor.

Now the real challenge comes in: getting stakeholder approval!

If you have never built a business case, it can feel like tireless exercise. But it's a crucial step and necessary for educating decision makers, and encouraging them to take some level of action.

Fortunately we have created this guide to arm you with every bit of information necessary to successfully gain support and approval for your intranet project.

Good luck!

The ThoughtFarmer Team

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PART ONE

IDENTIFYING AND DEFINING THE OPPORTUNITY

Organizational goals and how an intranet helps

If you have begun the journey of acquiring an intranet, you likely already understand its value. But that doesn't mean what is obvious to you is obvious to everyone else—especially when you have a panel of decision-makers in front of you.

So before we go any further you need to understand how (or if) the intranet you are proposing aligns with your business strategy. From there you can work to align your intranet goals directly to your business strategy.

For example, if you are a large retail organization, your core business may be focused on selling and promoting your goods. For your employees to excel at their job they require knowledge of the products, and even some industry knowledge and insight. But where is this information currently located? And is it easily accessible and shareable?

Or perhaps your business is a franchise, and your franchisees need access to branded documentation and collateral to maintain your corporate look and feel. Where are your franchisees currently accessing these resources? And how can you ensure they are using current and updated collateral?

Once you envision how your proposed intranet can align with your business strategy, it's time to come up with actual intranet objectives. These objectives can come from multiple sources such as focus groups or online surveys, but regardless of where they come from, there are typically five reasons organizations pursue intranet software:

KNOWLEDGE MANAGEMENT

An opportunity to capture, organize, and diffuse knowledge.

COMMUNICATION

A platform to disseminate news and important announcements.

COLLABORATION

A centralized platform for teams and projects to succeed.

EMPLOYEE ENGAGEMENT/WORKPLACE CULTURE

A virtual location for personal employee interaction.

BUSINESS EFFICIENCY

Automating tasks and processes, and supporting the simplification and automation of internal processes and practices.

If we look closely at each of these elements individually, we can see exactly how an intranet can make a positive impact.

KNOWLEDGE MANAGEMENT

Almost every company struggles with isolated knowledge. Capturing relevant knowledge trapped inside the minds of employees isn't easy to do—especially without processes or tools in place to facilitate it. Organizations who fail to capture employee knowledge suffer from reduced productivity, low employee awareness, and crippled innovation. In fact, according to a study by the International Data Corporation (IDC), employees spend approximately 2.5 hours per week searching for people and information within the company, which costs companies on average \$7,000 per employee, per year. For an organization of 500 employees, that equates to \$3.5 million dollars!

How an intranet helps

An effective intranet will break down communication barriers. By enabling people, information, and processes to come together, employees have access to more tools and information to effectively complete their job. An intranet helps an organization become more agile, productive, collaborative, and competitive.

COMMUNICATION AND EMAIL MANAGEMENT

A typical knowledge worker spends seven hours per week reading, sorting, and replying to emails. This equates to 432 hours or 54 days per year. One-third of this time is spent on questionable tasks, like reading *reply all* messages, reverse engineering email threads, and trying to locate attachments. The IDC estimates these tasks can cost companies on average \$8,000 per employee, per year.

How an intranet helps

An intranet helps reduce email usage as informal discussions now move to the intranet platform, where information is conveniently captured and stored. This information then becomes searchable and browsable, creating a knowledge repository the entire business can benefit from.

COLLABORATION

A Salesforce survey of more than 1400 corporate executives, employees, and educators found that 86% of the participants believed that lack of collaboration was responsible for workplace failures. As more and more businesses offer telecommuting and remote working options for their employees, we can no longer rely solely on in-person collaboration.

How an intranet helps

An intranet solves collaboration challenges by providing a central platform for employees and teams to connect, engage, and succeed. Whether it's through shared documentation or discussions, an intranet helps reduce unnecessary meetings or incorrect or outdated

document versions. It also helps organizations adapt to changing workforces, making collaboration asynchronous.

EMPLOYEE ENGAGEMENT/WORKPLACE CULTURE

There is no shortage of stats that correlate workplace culture and employee engagement with higher levels of productivity. In a recent engagement report by [Gallup](#), it was revealed that highly engaged business units achieve a 10 percent increase in customer metrics and a 20 percent increase in sales. In other words, an engaged culture improves performance, not the other way around.

How an intranet helps

An intranet is a great tool for combining professional and social in a way that enhances your organization's culture and employee engagement. It's also a great way to surface communities of practice within your organization.

BUSINESS EFFICIENCY

While many of us would like to avoid them, workplaces are full of necessary processes. From operations and customer service, to regulatory management, processes are imperative to organizational efficiency, and sometimes even safety. However, because many of us perform these tasks in a perfunctory sort of way, we may not always be accomplishing these as quickly or as efficiently as we could be.

How an intranet helps

By streamlining business processes and simplifying access, intranets can deliver huge value. Things like vacation request forms or other common workflows can easily be automated from within the intranet.

Examine department objectives

It's also worth breaking down objectives by department, and considering how an intranet will impact and benefit each one. For example:

Department	Example department objective	Intranet approach to achieve objective
Sales and Marketing	Increase brand awareness and sell product/service	Up to date sales collateral and templates
Customer Service	Reduce call handling times	Structured knowledge base of previous issues and resolutions
Human Resources	Improve employee experience	Dedicated area for new employees to access onboarding content Onboarding FAQ to address common questions new employees have
Executive team	Keep employees focused and informed on organizational objectives	Create a dedicated and secure area to retrieve documents Share goals and strategies

CONDUCT A SURVEY

Now is a good time to conduct an employee survey. Employee surveys are a great way to solicit feedback on a wide variety of workplace issues.

The information you collect here will be valuable data to present to your stakeholders and highlight the same pains and frustrations that led you to first consider purchasing an intranet.

Here are some sample questions that you can ask your employees to understand their pains with the current system:

- Are you able to keep up with your current email load?
- Are you satisfied with the length of time it takes to complete an internal form?
- Are you aware of the projects other colleagues and departments are working on?
- Do you feel as though internal collaboration can be improved?
- Where do you currently access important internal information?

As you can see, an intranet has the ability to provide tremendous value to your organization, but it should always be tied in with the bigger picture. Review some of the sample intranet objectives outlined in this section and see if they align with your organizational goals. Once you have identified this you can start defining how you will measure intranet success.

PART TWO

MEASURING SUCCESS

Measuring outcomes against business objectives

Drawing on the objectives we've already outlined, it's now time to look closer and determine what goals you want your intranet to help you achieve. As mentioned before, you are likely to be asked what the tangible outcome of a proposed intranet is. And as great as *stronger employee engagement* is, your decision makers are going to expect something more concrete and measurable.

Most people understand the value of employee engagement, improved communication and collaboration, and increased knowledge share. Unfortunately measuring these things is a different beast. Not that it isn't possible to measure, but it's certainly not as obvious of a measurement as something like accounting software.

We talked in part one about the common reasons most organizations choose to acquire intranet software. Now let's look at how each one of these objectives can be measured. This will not only help reinforce the frustration that likely got you to this point, but it will also help your decision makers recognize the specific outcomes of what you are proposing.

ThoughtFarmer has analytics built into the platform, making it easy to measure a lot of the below KPIs. We also suggest running an additional survey about six months after your intranet is launched to further reaffirm the success of your goals and objectives.

Knowledge management

We've already established that an intranet can facilitate and improve knowledge management. This can be measured by baselining how employees share new ideas and then measuring once an intranet is in place. You could also measure how many of these ideas were implemented. Discussion forums are ideal for generating ideas. An intuitive intranet with a user-centric information architecture and a robust search engine will also help staff find content faster and save time.

OVERALL OBJECTIVE: Increase the amount of knowledge within an organization.

Target KPIs:

- Employees are sharing knowledge
- Employees are commenting on content

Communication

Communication may feel like a broad objective, but that doesn't mean it can't be quantified. For example, if your organization is struggling with email overload, you may choose to pursue a goal related to reducing email traffic or its burden and cost on servers. For example, you can measure how many all-staff emails were sent right before launch, and then measure again six months later.

OVERALL OBJECTIVE: Improve internal communication throughout the organization.

Target KPIs:

- Employees are reading corporate newsletters
- Email usage is down
- New content is being created

Collaboration

The definition of collaboration is two or more people working together towards shared goals. But how do we measure this? Collaboration can be measured by counting things like the number of teams or groups created, or through the number of files added or shared to these groups. You can also measure collaboration through comments.

OVERALL OBJECTIVE: Improve collaboration company-wide.

Target KPIs:

- More groups are created
- Comments have increased
- Updates are being shared

Employee engagement/workplace culture

We often think of culture and employee engagement as a touchy-feely thing that cannot be measured. However what happens when your employees feel engaged and included in a strong culture? They stay longer. In other words, you can relate your objectives to employee turnover. Include how turnover is currently calculated, what it is now, and the associated reduction of costs by lowering it.

OVERALL OBJECTIVE: Improve workplace culture.

Target KPIs:

- Employees express satisfaction
- Decrease in turnover
- Employees are liking content
- Employees are praising other employees (e.g., Shout-outs, comments)

Business efficiency

Measuring business efficiencies should be fairly straightforward. You will want to begin by baselining current processes (like submitting a vacation request via PDF form), and how long that takes from start to finish. Once your intranet is up and running, you can measure again, and calculate the ROI based on time saved. Automating business processes (including forms) is one of the best ways to achieve immediate efficiency.

OVERALL OBJECTIVE: Improve overall internal efficiency.

Target KPIs:

- Employees can easily find information
- Employees are creating and sharing content
- Intranet usage is increasing
- Employees are viewing/downloading content

The KPIs mentioned above are based off thousands of hours of research, discussion, and work by our internal professional services team. They may not apply specifically to your organization, but they should give you enough inspiration and ideas to hit the ground running.

PART THREE

IDENTIFYING COSTS AND POTENTIAL RISKS

Understanding costs, hosting options, and regulatory requirements

Now that you have determined how you will measure success, it's time to identify potential costs and risks.

Your audience may not be familiar with intranet software, how it is deployed, and how long it would take to launch. As such, a new intranet may be viewed with skepticism. It is therefore important that you demonstrate to your decision-makers that all possible risks have been considered and potential solutions have been identified.

When identifying potential risks, first start by spelling out your goal in simple terms. This will clarify what it is you are trying to achieve. Then include a list of things that might derail your objective. For example, you might want to say something like:

Our main goal is to acquire intranet software that improves employee collaboration, centralizes employee communication, and increases internal knowledge share. It should take approximately two months to migrate previous documents and educate employees. The project will require the help of X, Y, and Z. Potential risks may include A, B, and C.

Regulatory requirements

Depending on your industry, you may have additional considerations to address that will go beyond a typical business case. For example, if you operate in industries such as finance, healthcare, or government, you may be subjected to increased levels of compliance or restrictions that may impact your project. Or, you might be part of an industry where annual budgets determine—or dictate—when technology can be purchased. If this is the case you should aim to fit your project into this purchasing window.

The 'other' risk

We talked about various potential risks related to your intranet project, but there is one other risk worth mentioning: the risk of doing nothing at all.

If we go back to your original objectives outlined in section one, we can now envision how each department could be impacted by avoiding an intranet altogether. For example, we discussed how an intranet can benefit a sales team by providing them with a central location to access critical and up-to-date sales documentation. Now consider how this sales team could be adversely impacted by not having an intranet. This would likely equate to time spent locating documents or incorrect document versions.

Estimating costs

Where will the money come from? Are funds already available? Or will they be shifted from another current allocation?

Obviously, the new software will have an associated cost and your stakeholders will expect this. This is why it's important to first estimate the amount of money and hours you may need to complete the project.

Total costs should include any hardware, third-party software, or additional vendors. There is also the cost of having staff manage and maintain it.

Hosting requirements

Traditional intranet solutions focused primarily on in-house deployments, especially in more industries where concerns about security and control, are critical. However, an in-house intranet project requires associated infrastructure and hardware. On-premise deployments can be large, complex, and costly. For example, a SharePoint implementation can take months or even years of migration.

It's important to weigh the merits of a cloud-hosted option and subscription-based license that spreads out the cost of ownership over time, against a potentially more expensive up-front investment required by on-premises platforms.

Cloud-based intranets typically cost less and are more sustainable. Cloud-based solutions also tend to have lower occurrences of downtime and fewer open support tickets compared to on-premise. Also, updates and upgrades can be rolled out remotely and instantly, therefore limiting the impact on business operations.

If you are unsure about hosting options, these questions may give you some direction:

- Will we need an in-house or cloud-based intranet solution?
- What upfront investment is there for new infrastructure and hardware?
- Are there associated costs for storage, upkeep, and licensing?
- Could there be any potential impact on existing systems?
- Do we need a dedicated IT resource to manage and maintain it?
- What are the risks and financial implications of server downtime for our business?

Identifying potential costs and risks is one of the most important elements of your business plan. Yes, it requires some hefty research, but as with all the other elements of your business plan, the more information you can obtain ahead of time, the more likely your project and plan will be accepted and approved.

PART FOUR

IDENTIFYING YOUR STAKEHOLDERS

How an intranet will help individual and departmental roles and goals

Determining the stakeholders who are responsible for signing off on your project is a critical step in building your business case. While it may be tempting to underestimate this step or skip it altogether, identifying these individuals early in the process ensures that someone won't voice their concerns too late and potentially derail your project, or catch you off guard. Knowing your decision makers ahead of time also helps you recruit potential ambassadors for your intranet project. Who doesn't want that?

Who are these people?

There may be different stakeholders throughout the life of your intranet project. These stakeholders could be team members who are directly engaged in the project, external consultants brought in to manage the project, or even end-users who also play a critical role.

Typically an intranet project (depending on the size and the scope) will involve someone from Information Technology (IT), Human Resources (HR), Communications, and your Executive team.

Some of these people will be invested in carrying the project forward, but others may be intent on preventing it from happening at all. For this reason, it's important to understand which stakeholders have the most influence over the success of your project, which may be your largest supporters, and which might be your most important opponents.

If you have doubts about what matters most to your stakeholders, don't be afraid to ask them. Most stakeholders will be more than willing to discuss how they feel about a potential new project, and what their influence may or may not be.

What are their concerns?

Presuming your stakeholders fall into the four categories (IT, HR, Communications, and Executives), let's take a closer look at what specific concerns or questions they may have that relate to your intranet project:

INFORMATION TECHNOLOGY

Whether it is a senior IT manager or a junior IT administrator, this group will have some important concerns that need to be considered. You should begin by addressing the overall security of the intranet solution you are proposing, as well as discussing where it will be hosted, any potential integrations, and whether it requires IT resources to build.

HUMAN RESOURCES

With a mandate of ensuring the hiring, retention, and overall happiness of employees, human resources has a vested interest in the success of your intranet platform. Discuss elements such as employee onboarding, employee engagement, and workplace culture.

COMMUNICATIONS

Often a huge driver of intranet software, communication professionals desire tools and processes that allow them to disseminate important corporate news, events, and employee information. Discussing how the intranet will impact their ability to reach staff and ensure their messages are read is a good place to start with this group.

C-SUITE

As long as you focus on decreasing costs and increasing revenue, you are speaking the c-suite language. For example, rather than saying, “We need a document collaboration solution,” you can position it as, “We are spending too much money on challenges related to poor document collaboration, so here is what I am proposing as a fix for that.”

END-USERS

Your end users might not get a vote in which intranet vendor you choose, but don't lose sight that communication, knowledge share, and employee engagement affects every single department. If you don't address their concerns from the start, you risk low engagement with your new intranet, and that's not good for anyone.

As you can see, identifying and involving stakeholders can be a large part of ensuring the success of your project. But to gain their participation and support you need to understand their interests and influence. From there you will have the knowledge to address their concerns and demonstrate how the project will benefit them individually, as well as the overall organization.

PART FIVE

OUTLINING YOUR PROJECT PLAN

Project details, resources, budget, timeline, etc.

We've analyzed the opportunity, examined risks, and identified stakeholders. Now it's time to outline your project plan.

A project plan is a formal document designed to guide the control and execution of a project, outlining the scope of work, schedule, and responsibilities in a single place.

If you have already determined a potential vendor, now would be a good time to inquire about their proposed project plan. For example, do they offer professional services? If so, you will need to include that within your project plan. Some vendors even offer plan templates based on their experience working with clients.

It's easy to get stuck at this stage of the process or to assume a project plan is a complex document, but ultimately, it will help you identify the milestones, tasks, and other things that are critical to your project's success.

Your project plan will also reveal the necessary resources, budget, and a timeline of measurable goals. It aims to answer important questions such as:

- Can it be done?
- How much will it cost?
- Is it viable?
- Will it work?
- How can we be sure it will deliver the right benefits?

If started early enough, project planning will support an assessment of value and the overall business benefits. Your project plan acts as the basis for communication and is important in gaining senior management support.

Your plan should consider the following:

SCOPE

- What are the requirements for a successful project? (In the early stages, it's important to have an [intranet strategy workshop](#) so the team understands the main objectives. These objectives will align with future KPIs.)
- What is *in scope* for this project?
- What is *out of scope* for this project?
- Are there any timeline constraints that will impact the amount of work that can be completed?

TASKS AND MILESTONES

- What are the phases and deliverables of our project?
- Is each phase and deliverable broken down into manageable tasks?
- What resources are needed internally for each phase/activity?
- Have you included milestones for your team to work towards and to celebrate wins during the project?

LABOR AND RESOURCES

- Whose labor hours are required? What departments do they impact?
- How many people are involved?
- What is their availability to work on the project? Does this change over time?

SCHEDULING

- What is the proposed timeline/launch date?
- Are your estimates achievable? Have any team members confirmed these estimates?
- Does your project plan account for dependencies?
- Have you completed critical path analysis to determine the tasks that cannot be delayed without impacting the completion date?
- Are there any tasks that can be completed in parallel?
- Have you considered the time required for time-intensive tasks such as the content inventory, content audit, and content migration?

TRAINING

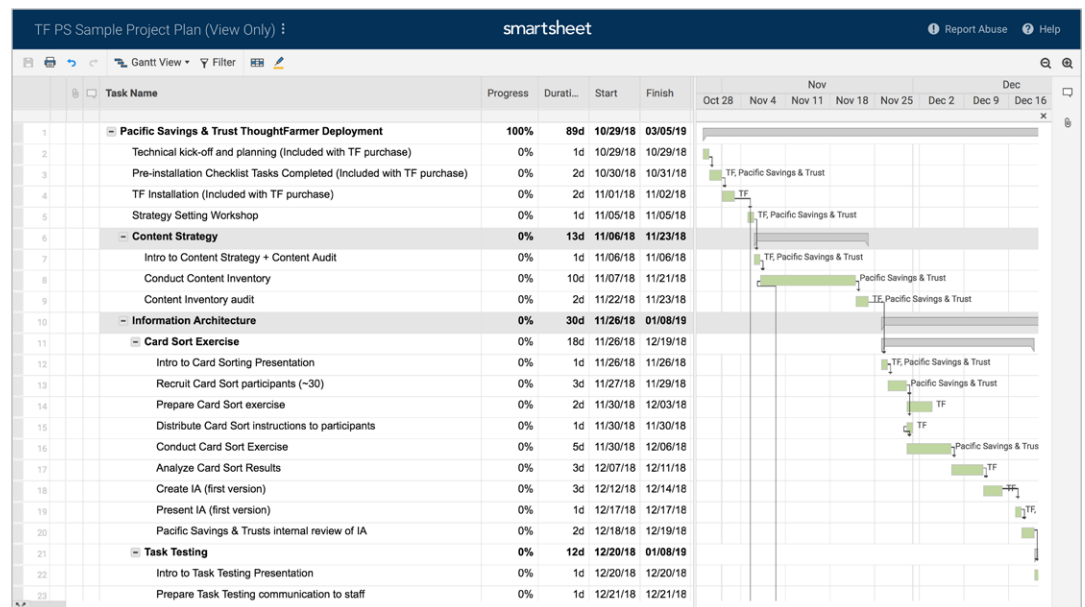
- Will training be remote? Or will it be offered onsite?
- Have you included the necessary product training to ensure that your team is ready to use the new intranet software?
- Does your team have the skills and expertise needed to launch the new intranet? (IA, content, launch, and communications planning.)

COSTS

- Will there be hourly costs?
- Will there be any travel expenses?

While it isn't necessary, it is certainly advisable to create your project plan within a spreadsheet or a specific project planning template. This will help you assign accountability and keep tasks and people on track. We recommend using [Smartsheet](#), an application for collaboration and work management.

Below is a sample of a high-level project plan:



A project plan requires low-level effort, but it's a necessary document to keep your intranet implementation moving forward. It will keep your stakeholders happy because they understand the scope and you can feel good knowing you've done your due diligence.

PART SIX

PRESENTING YOUR BUSINESS CASE

Choosing a format, predicting objections, etc.

It's now time to tackle the final step in your intranet business case: revealing your plan.

Pick a format

There are many different ways to present your plan. Some of you may choose to keep it simple and stick with a PDF document, while others may want to construct an elaborate video and PowerPoint presentation. Remember that beautifully illustrated data can go a long way in persuading your audience, but overwhelming slides with unnecessary details can bore or even confuse them. In the end, one method is not better than the other. You know your audience best, so we encourage you to choose the format that will resonate with them the most.

Lead with the need

Start by describing the purpose or pain point the intranet will be addressing. No matter how well researched or innovative the solution, you likely won't get support from your audience if the need isn't clear from the start. Ask yourself, "What is the message I'm trying to convey?"

Tell a story

Facts and figures are great but a strong narrative will really connect your audience on a deeper emotional level. Don't be afraid to share all the frustrations and challenges you feel contributed to your intranet journey. Let them know why you began this quest, and how you arrived at your decision.

You might even want to create a hypothetical narrative, and invite your audience into a scenario of how a new intranet could benefit and impact employees.

For example, you could say something like this:

Imagine our company just completed an exhausting search to hire Erin—a Product Management superstar. Day five into the new job and Erin is already overwhelmed. She cannot remember her colleague’s names, doesn’t know where new employee information is located, and isn’t sure if the task she is working on has already been completed by someone else. To make matters worse, she has four different documents to sign and cannot recall who to submit them to. Is this how we want our new employees to feel during their first few weeks? What if Erin quits? Can we afford to go through another candidate search? What if there was a way for all employees, new and existing, to feel connected to each other, locate important documentation, and share relevant information?

Anticipate objections

Imagine that you’re in the room with the executive team. You can feel your message resonating. You are so close to successfully making your pitch, and then out of nowhere, one of them drops a bomb on your presentation and asks a question you were not expecting. You do your best to answer, but in spite of your efforts, you realize that your audience now has doubts.

Yes, there will be questions. And yes, there will be objections. But don’t let them derail your business case. You need to be ready for all the expected (and unexpected) questions that may come your way.

OBJECTION: *Why should we invest in a new intranet when employees rarely visit the existing one?*

Adoption is a huge and valid concern. Be sure to convey why any previous platforms were not adopted and how you plan to overcome that with a new one. Better yet, have an adoption plan already in the works! This is also a good time to provide strong data that supports your argument.

OBJECTION: *Can we afford this?*

Cost is typically the number one objective, and a critical metric for CIOs or anyone else overseeing budgets. The initial set-up and costs to acquire technology, as well as any expenses to maintain it, are important measures of success and provide a benchmark for calculating a return on the proposed improvements. It’s important that you articulate not just why you can afford it, but also the potential cost of not pursuing a new platform.

OBJECTION: *Can we spare the resources?*

Most organizations are regularly subjected to cost and resource pressure, so it’s important to express how and when resources are required.

Include references

The right vendor will likely have an assortment of case studies that speak to various verticals and markets. Select a few and include it in your presentation. Not only will this demonstrate the vendor’s credibility, but it will also outline how organizations similar to yours overcame specific challenges with their intranet.

Conclusion

Congratulations! You are now finished.

If this entire process felt like a lot of work, that's because it was. Building a solid business case is an in-depth process but it has its merits. Arming yourself with relevant research, data, and options is the most compelling way to present a clear argument to win over any skeptics. In other words, investing the time and effort will almost always result in a positive outcome.

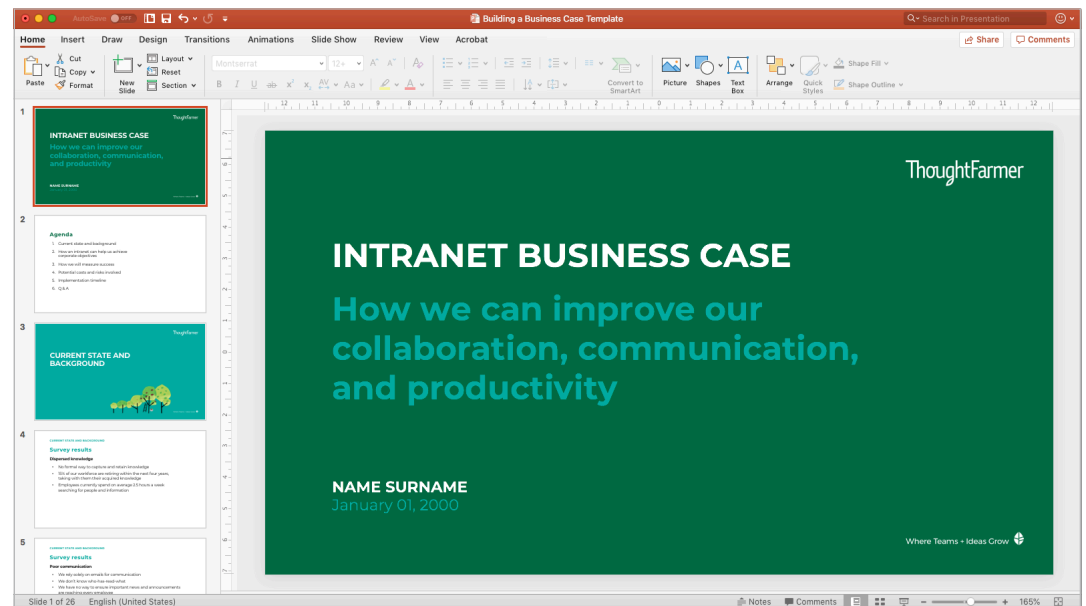
PART SEVEN

TEMPLATE FOR BUILDING YOUR BUSINESS CASE

Free template to help bring your business case to life

Now it's your turn to collect all the relevant research you've accumulated and present it to your stakeholders. To complete the guide here is a free template to create your own business plan:

[Download PowerPoint template](#)



THANK YOU FOR READING!

We want to help make your intranet project a success. If you have questions, need additional resources, or simply want to check out what our award-winning intranet ThoughtFarmer has to offer, [get in touch with us](#). We'd love to chat.

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