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HOW TO CREATE THE BUSINESS CASE FOR NEW INTRANET

Articulating your project correctly is The key
to getting organisational lift-off



LET US BEGIN

Writing a business case to justify the investment of both time and capital into a new intranet can be tricky.

Whereas many other technology efforts have a more linear impact on revenue that's easy demonstrate, an intranet is, by its very definition, internally focused and not strictly dedicated to improving cash flow.

Here's something unpopular to say about the business case for an intranet: there's unlikely to be an easily measured, definable ROI that you can base it on.

Few mid-market organisations have the time or resources to measure how long it takes a representative individual from each area to carry out every function on an intranet and then work out an average, before then changing the process, repeating the measurement and then working out the time saving and thus cost saving based on time x wage measurement - the cost involved in undertaking the scoping project will far outweigh any provable return.

Instead, a business case for an intranet needs to focus on the benefits it could provide; intangible things that support overall strategic goals, such as creating a place to define and promote organisational culture or where digital-first goals, processes, and procedures can be articulated and enforced.

Regardless of where the merits lie, what's clear is that, with an ever-increasing number of divergent technologies and processes within every organisation, having somewhere where they can be effectively accessed is critical to preparing every organisation for future success.

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01. DEFINE YOUR VISION AND DRIVERS

It's important upfront to create a vision statement that quickly conveys why you think a new intranet is a good idea for your organisation. In it, you should try and answer:

- What are the top line reasons for investing in your intranet?
- What should your intranet be?
- What will it do for your organisation and its employees?

That's quite a lot to cover in a few paragraphs, however brevity really is the key to creating an effective one that will capture the imagination of your senior management team and set your stall out for what is to come.

An example of a vision statement is to the right:

“Intranet technology has significantly moved on since we last invested in our intranet and, based on the amount of money that's required to keep it functioning vs. the benefit that it provides, it's no longer cost-effective or meeting wider organisational needs.

Through investing in a new intranet platform, we will save money, increase productivity/efficiency, enhance customer service, and improve internal culture and employee engagement, thereby reducing staff turnover.

This can be achieved through adding new collaboration functions, automating and stream-lining processes and workflows, as well as reducing the time needed to carry-out necessary tasks. Additionally, a new platform will provide the organisation with deeper insights as to staff engagement and provide leaders with insights that will allow for better decision-making.”

02. ARTICULATE YOUR GOALS AND OBJECTIVES

Nailing this part of the business case is really the key to defining the opportunity and future success of your new intranet project.

Here, you need to outline what the goals are for your intranet and how they can be achieved through it.

Generally, for most intranet projects, there are four key goals that organisations are looking to achieve, namely:

- Improving efficiency/productivity
- Increasing staff engagement, collaboration and retention
- Cutting costs
- Enhancing customer service

Of course, there could be more, such as issues around regulatory compliance or wider 'digital transformation', but through following these (as this guide will do), you can't go too far wrong.

When stating a goal, you shouldn't just say what it is, but also explain why and how to provide context. Through doing this, you'll add colour and a better understanding at every stage for your actions (see right for examples).

Top-tip: By tying your goals to wider organisational ones, you'll give yourself a leg-up on getting management buy-in. For example, if your organisation is looking to digitise and digitally transform, then you can emphasise aspects that speak to that, such as around productivity. Another option is to include a strategic alignment statement where you can articulate exactly how a new intranet fits in.

With a clear set of goals, you should then break that down a little further into smaller objectives that will help you reach them.

What's the difference between goals and objectives?

At Brennan, we look at the difference as a goal being the overarching ambition or theme, whereas the objectives are things/features that want to add to help you to get there. Yes, it's largely a semantic exercise trying to split the two terms, but it helps to provide you with clarity as to what it is that you're trying to achieve and how you'll get there.

Overleaf are some examples of goals and objectives, as well as the features of an intranet that will help you to reach them.

GOAL 1: Make staff more productive and improve employee efficiency through providing new digital-first tools, streamlining processes, and reducing the need for manual inputs

OBJECTIVES	FEATURES TO SOLVE
Provide new, more effective communication channels to improve organisation-wide and inter-departmental working	Team collaboration spaces, social channels, personalisable news feeds, optimised user experience (UX) design
Implement new processes, workflows and automations that save time	Workflow mapping and management tools, integrations with CRM/ Marketing Automation/Finance technology
Better information management will reduce duplication of efforts	New multi-authoring cloud tools, enterprise search, managed libraries, redesign information architecture (IA)
Allow for remote access and working across all devices	Responsive design, security policy changes
Standardise processes/documentation across entire business	Review, Wiki, team sites
Engineer solutions to manual, repetitive tasks	Workflow mapping and management tools
Clear audit trails	Access/permission management tools, document audit trail
Improved analytics to identify and fix problems	Added analytics, reporting functionality
Standardise, stream-line, and speed-up employee onboarding	Create pre-packaged onboarding assets, support video content, team sites

GOAL 2: Improve staff satisfaction, enhance culture, and reduce churn by fostering an open and collaborative working environment

OBJECTIVES	FEATURES TO SOLVE
Give all employees a space to be heard, ask questions and comment	Team sites, comment/like functionality, feedback forms, staff directory
Inform them of and offer them the opportunity to become involved with projects outside of their normal scope	News feed, team sites
Provide evidence of who is engaged, who isn't, and analysis of most read content can inform you of strengths and weaknesses in your approach	Improved configurable analytics, automatic report set-ups
Ensure that employees and teams are better-informed about things that affect them	Personalisation based on team/department, support interest tagging
Provide an effective channel for HR culture initiatives to launch and be carried through	Create new comms channels for espousing culture, post management, permissions
Create spaces for extra-curricular, staff-owned initiatives	Interest-tagging, team sites, social channels, Wiki
Provide you with the opportunity to readily seek input and discover sentiment	Survey tool, voting, like/comment functionality

GOAL 3: Cut costs by reducing maintenance and support costs by sourcing a more effective platform and utilisation automation and integration technologies

OBJECTIVES	FEATURES TO SOLVE
Save time looking for assets/information	Improved IA, enterprise search, clearly defined structure, maintenance logs and alerts, improved UX design, resource library, staff directory
Provide self-served role-based training and advice	Wiki, document library, video content compatibility
Save other, more time-consuming forms of communication	Team sites, social channel, news feed
Stream-line processes and automate workflows	Workflow mapping and management tools, integrations with CRM/ Marketing Automation/Finance technology, forms
Reduce employee admin	Workflow reengineering, integrations, implementing self-service features

GOAL 4: Improve customer service by providing employees with the tools, resources and information necessary to provide an optimal customer experience

OBJECTIVES	FEATURES TO SOLVE
Provide all your employees with access to the latest service/product documents	Resource library, advanced permission management, enterprise search, stream-lined IA
Keep staff informed of important individual customer news	News feed, team sites, multi-channel publishing, social feed
Inform employees of changes to standard operating procedures or service pathways	News feed, team sites, multi-channel publishing, social
Provide a single view of the customer	Integration with CRM/marketing automation/finance technology
Provide spaces for better knowledge sharing and collaboration around customers or service/product problems (crowd-sourcing)	Team sites, collaboration spaces, Wiki, resource library, staff directory
Save time on manual inputs to allow time for more-personal, improved service	Workflow reengineering, integrations, forms

03. GATHER INFORMATION AND SET MEASURES

Senior management are unlikely to be totally out-of-the-loop when it comes to the imperfections of your existing intranet, however it could be that they're unaware of how difficult it is to undertake necessary tasks or how much your current system is costing your organisation to maintain.

To understand the impact, you need to interview key personnel involved in running the platform (usually IT and HR/Comms) and extract metrics from your existing platform to provide evidence for your assertions. Through doing this, you'll establish what the hard costs of your intranet are to the organisation as well as quantify some of the softer ones around engagement and productivity/efficiency.

With a view of these, it's also time to set some goals for improvement.

Basic information to collect

First-up, you'll need to collect some general information to set the scene. There are two key areas:

Information about your old intranet:

- What technology is your intranet on?
- When was your intranet implemented?
- When was your intranet upgraded?
- Who supports your intranet?
- Who's responsible for development?

- What is it integrated with?
- What isn't it integrated with?
- Who's responsible for maintaining your intranet content?
- What's your current intranet strategy?

General organisation metrics:

- Average meeting size
- Average meeting length
- Average length of time taken to go from one intranet page to another
- Average salary of employees per hour (p/h)
- Average salary of those responsible for supporting your intranet p/h
- Average salary of those responsible for maintaining your intranet p/h
- Average salary of those responsible for supporting your customers p/h
- Average recruitment costs per role
- Average time to recruit a new role

Measure setting

Here's where you get to demonstrate current difficulties using insights provided through some research and analytics.

For each, it may be necessary to explain why there's a problem there, so be ready to discuss why a measure needs to improve and what the impact of that change would be to benefit your organisation.

It doesn't need to be a huge list, but providing some evidence for your assertion that you need a new intranet is a good idea!

Overleaf are some examples of measures for the previously mentioned goals.

Targeted improvement

This is where you're going to need to go state how much you're going to improve with a new intranet.

Again, there is no exact science to this, but look at each measure and wider statistics (some are included later) to try and benchmark and proffer an opinion on what results you can hope for.

This isn't a time for stretch goals, but realistic expectations for improvement.

Top-tip: With these measurements, don't stress that these are correct to the decimal point. Approximations and best-bets, if consistently used and reasonable, will provide a benchmark to measure against.



Goal 1: Make staff more productive and improve employee efficiency through providing new digital-first tools, increasing collaboration, streamlining processes, and reducing the need for manual inputs	Goal 2: Improve staff engagement, enhance culture, and reduce churn by fostering an open and collaborative working environment	Goal 3: Cut costs by reducing maintenance and support costs by sourcing a more effective platform and utilisation automation and integration technologies	Goal 4: Improve customer service by providing employees with the tools, resources and information necessary to provide an optimal customer experience
How many physical meetings are occurring a month?	How useful do your employees rate your intranet?	What are your current staff travel costs for internal meetings?	How many fields of information are recorded against contact?
What's the organisations email volume per month?	How easy do your employees think your intranet is to use?	How much are you spending on paper per month?	How often are policy/product/ service documents accessed?
How many video conferences are occurring per month?	What's your current staff turnover rate?	What's the ongoing licensing cost of your intranet?	How many conversations are there about projects/ customers?
What are your key page bounce rates?	How long does it take to onboard them?	What are the other hard costs (servers etc)?	How do customers rate your organisation?
How long are people's journeys to key pages/ systems?	On average, how frequently are users logging in to your intranet?	What's the cost of supporting it per month?	How do customer rate your support channel?
How long does it take to complete common tasks?	What % of employees are authoring posts or commenting?	What's your annual development cost?	What's your current number of customer support cases?
What's your average product/ service delivery timescales?	How many pages are there?	What's the cost of additional intranet software?	How long does it take to resolve support cases on average?
How long does it take to compose and distribute a post to a group?	How many comments are there?	What's the cost of maintenance per month?	How often are customers visiting your website?
How long does it take to train someone to use the intranet?	How often is your intranet's news feed being updated (hours)?	How many queries do they field a month?	How often are customers engaging with your content?

04. DISCOVER CURRENT BEST-PRACTICE

As you've outlined your organisation's problems, it's now worth outlining the case for change.

Use data and 3rd party expertise to demonstrate what an intranet (or if someone's being fancy: 'Digital Workplace') can do, as well as the effect of having a bad intranet is having on your company.

To help you get started, here are some of the things that we think most relevant:

How your intranet is costing you

- 66% of employees are unhappy with their organisation's intranet ⁱ
- Your employees spend 36% of their time searching for information and only find it 56% of the time ⁱⁱ
- A good intranet can increase employee engagement by 53% ⁱⁱⁱ
- 31% of employees never use their organisation's current intranet ^{iv}

How a new intranet will improve your organisation

- 55% of employees in mid-market organisations require mobile access to data ^v
- Organisations that roll-out internal social media tools increase staff satisfaction by 20% and productivity by 7% ^{vi}

- Mid-sized organisations could gain AU\$6.6m p.a. in employee productivity by improving intranet design ^{vii}
- By using social technologies, companies can raise the productivity of knowledge workers by 20 to 25% ^{viii}
- When employee engagement goes up, there is a corresponding increase in employee retention of up to 78% ^{ix}
- Top-quartile engaged employees outperform bottom-quartile by 10% on customer ratings, 22% in profitability, and 21% in productivity ^x

It could also be worth featuring any case studies that you think relevant to your organisation to outline real-life examples of how an intranet change or upgrade has impacted them. For the best impact, focus on those that relate directly to your expressed goals and objectives from within your sector.

Want more stats? We've three infographics that can support you in your assertions with careful researched facts, including one on the benefits of an out-of-the-box intranet. **Download them here!**

ⁱ Nielsen Norman Group, Intranet Usability Guidelines: Findings from User Testing of 42 Intranets Vol. 07: Navigation and Page Layout, [Online], [Link](#)

ⁱⁱ IDC, The Knowledge Quotient: Unlocking the Hidden Value of Information Using Search and Content Analytics, [PDF], [Link](#)

ⁱⁱⁱ Avanade, Digital Workplace Global Survey, [PDF], [Link](#)

^{iv} Prescient Digital Media, State of the Social Intranet Report, [PDF], [Link](#)

^v Techaisle, 2015 SMB Mobility Adoption and Trends survey, [Online], [Link](#)

^{vi} Deloitte, The digital workplace: Think, share, do, [PDF], [Link](#)

^{vii} go-globe.com, [Link](#)

^{viii} McKinsey, The social economy: Unlocking value and productivity through social technologies [PDF], [Link](#)

^{ix} Deloitte, The digital workplace: Think, share, do, [PDF], [Link](#)

^x Gallup, How Employee Engagement Drives Growth, [Online], [Link](#)

05. DETAILS ABOUT YOUR PROPOSED SOLUTION

Here's where you get to lay-out how you'd go about putting together this new intranet.

You've not undertaken a full technical assessment of your existing system, developed an intranet strategy, can't scope out full project costs, or even know what solution you want to implement but, in order to get buy-in, you're going to need to be able to outline what a solution could look like and outline the costs that are likely to be involved, as well as the potential ROI.

Unless you've large budgets then self-hosted, individually-developed intranets are likely to be beyond your budget. Therefore, to demonstrate the likely costs, it's worth considering solutions that will fit your existing wider technology stack, that have the functionality it's critical to add, and how you're going to be able to support it into the future. For many, this immediately lends them to looking in the direction of Microsoft and a SharePoint-run, Cloud-based, managed solution.

Why? SharePoint is a Cloud-based solution that readily integrates with your existing Dynamics and Office technologies, is easy-to-use, easily-supported, offers remote access from anywhere, and is always being built-on, meaning that it's almost future-proof.

There are also several vendors in Australia (including Brennan) that can provide out-of-the-box SharePoint solutions that are quick-to-deploy, personalise and get up and running - all for a relatively modest outlay - and who can provide ongoing support as part of the fee, saving you significant amounts of money on internal costs.

So what should you include in this section?

What the solution could look like

It's important to be able to add some colour to the conversation by showing annotated screenshots or short video demonstrations of what a potential solution could look like, outlining how it can be used, and how it departs from what you have now.

Another good inclusion here could be a list of the new features that you're hoping to include and then describing how they'll bring value and/or a benefit to your employees. Don't go crazy, but explaining the use of things such as social channels, internal Wiki, enterprise search,

CRM/Marketing Automation/Finance technology integration, video content support, mobile optimised remote access, or new collaboration tools/spaces are great things that can capture attention.

Project plan

We've another asset, 'How to implement an intranet in 12 steps' which can help you with this part (download it here now), but to summarise, we see it as a 12 step process:

1. It's not about management buy-in, it's about a top-down approach -hopefully you've just secured this!
2. Build the (multi-disciplinary) team
3. Understand your key organisational goals
4. Analyse your old platform
5. Fact-finding - technical and users
6. Plan your intranet and long-term strategy
7. Pick a solution

8. Implementation and migration, planning and execution
9. Launch your intranet
10. Train
11. Measure, analyse and optimise
12. Maintain and enforce

When outlining the project plan, make sure you indicate timelines and project phases.

Top-tip: Long project timescales increase the risk of time and cost overruns, as well as reducing the likelihood of success by lengthening the time it takes to decide on the solution and deploy it i.e. it may no longer be fit for purpose. Articulate what the likely timescales involved are from scoping to deployment and set some expectations.

You'll also need to outline who needs to be involved, when, and the amount of time that needs to be given to the project. Beyond deployment, there's likely to be a longer-term change management exercise to be had, so remember to include those that will be at the coalface long after the project has been deployed.

Outline costs and savings

It's critical to analyse the old vs. new, to give clarity around the costs involved and any potential savings. There are three types of costs to consider:

- The upfront costs
- The implementation costs
- The ongoing costs

When doing this it's important to remember that, whilst a new intranet might be initially more expensive due to deployment costs, a new system could quickly become cheaper than what came before it. Therefore, do analyse the impact over several years.

Do you want to know how to structure the rest of your intranet project?

You can download Brennan's 'How to implement an intranet in 12 steps' here.

COSTS		CURRENT SYSTEM	NEW SYSTEM
Upfront costs:	Access fee		
	Hardware		
Implementation costs:	Deployment		
	Configuration		
	Development		
	Training		
	Licensing		
Ongoing costs:	Secongary tools/plug-ins		
	Support		
	Maintenance		
	Development		
	Training		
TOTAL COST in first year			
DIFFERENCE in first year			
TOTAL COST in second year			
DIFFERENCE in second year			
TOTAL COST in third year			
DIFFERENCE in third year			

Demonstrating ROI and value

Demonstrating the value that your new system can bring to your organisation is a matter of bringing together the measures initially outlined in part three and then calculating the ROI that can be derived from them.

As previously discussed, you can go about measuring the time to complete actions and then extrapolating the cost from that, but the question you really need to ask is: is it worth it?

Some measures mightn't be easily quantifiable in terms of value. If so, leave them as soft measures (some people only use them when judging value) - it's really about your goals and what you're hoping to achieve with the project.

Focussing on savings and the things that are easily attributed and measured is nearly always the best approach; it should be appreciated that this is not an exact science, so don't panic if you can't add a monetary value to everything, as improving employee satisfaction is important and a measure of project success if your organisation has a stated goal of bettering it.

Top-tip: Pick just a handful of key measures to convert to a dollar return, this is largely a demonstrative exercise, rather than a complete cost/benefit analysis. Also, as with costs, remember that the value is likely to come over the course of several years, so don't forget to compound the benefits.

ROI formula for bottom-line-affecting activities:

$$\left(\frac{\text{Net profit from investment} - \text{Investment}}{\text{Investment}} \right) \times 100$$

Below, we've listed some examples of return calculations ranging from the simple, to the more complex, to demonstrate how granular you can get:

Example 1 - monetary value:

Organisations that roll-out internal social media tools increase productivity by 7% ^{xi}

You've 100 employees with average output per staff member = \$200,000 p.a. $100 \times \$200,000 = \20m .
 $(20,000,000 / 100) \times 7 = \mathbf{\$1.4\text{m p.a.}}$

Example 2 - soft-to-money value:

Reduce employee turnover rate from 15% to 10%.

100 person organisation, that means five fewer people.
Average recruitment cost is \$15,000, so $\$15,000 \times 5 = \$75,000$.
Average gap between employee departure and getting new employee fully functioning = 1 month. Productivity drop for a team due to short-staffing 10% per day. Team value per day = \$1,000. $\$100 \times 20$ (working) days = \$2,000.
+
Employee onboarding takes HR 3 days. Average HR wage is \$90,000 p.a. We're at work circa 240 days a year. $\$90,000/240 = \375 per day. $\$375 \times 3 = \$1,125$.
= \$78,125 p.a.

^{xi} Deloitte, The digital workplace: Think, share, do, [PDF], [Link](#)

Risk identification and mitigation

Any new piece of technology comes with risks, so it's important to outline the particular ones to your intranet project, the likelihood of them occurring, and how they could be mitigated.

Firstly, discuss the risks involved with a new intranet, such as overspending, before examining who it's a risk for, how likely it is to occur, and then the steps that be taken to avoid them.

Inaction could be worse...

You also need to talk about the risks of doing nothing. What's the likely, growing cost to your organisation going to be if you do nothing? How might it get in the way of other projects, objectives or strategies?



06. CRAFT YOUR EXECUTIVE SUMMARY

Members of your senior leadership team aren't likely to (or interested in) going through your whole assessment, so crafting an effective single page executive summary is critical in getting the project off the ground or peaking interest.

Take everything that you've just discussed and condense it to cover:

- The nature and rationale for the project
- Your goals and the benefits of achieving them to your organisation
- The costs and timescales involved
- The key value that you're expecting (cost saving, ROI, or soft value)

Your executive summary should always be presented at the beginning of any business case, so chop and change the document to include it first.

07. NEXT STEPS

You've should now have everything that you need to demonstrate why you should be investing in a new intranet.

To summarise, your business case should be structured like this:

- Title page
- Contents
- Executive summary
- Your vision and drivers
- Goals and objectives:
 - Goal 1:
 - Objective 1 + features to reach
 - Objective 2 + features to reach
 - Objective 3 + features to reach
 - Objective 4 + features to reach
 - Goal 2:
 - Objective 1 + features to reach
 - Objective 2 + features to reach
 - Objective 3 + features to reach
 - Objective 4 + features to reach
 - Goal 3:
 - Objective 1 + features to reach
 - Objective 2 + features to reach
 - Objective 3 + features to reach
 - Objective 4 + features to reach
 - Goal 4:
 - Objective 1 + features to reach
 - Objective 2 + features to reach

- Objective 3 + features to reach
- Objective 4 + features to reach
- Information gathering, assessment of your existing intranet and measurement setting:
 - Basic information
 - Measurements:
 - Goal 1 measures + target change
 - Goal 2 measures + target change
 - Goal 3 measures + target change
 - Goal 4 measures + target change
- Best-practice and external evidence
- The new intranet:
 - What it could look like and include
 - Project plan:
 - Timescales
 - Who's needed (and why)
 - Costs and savings
 - ROI and value
 - Risk identification and mitigation

From here, it's down to you to present and argue your case with management to secure your time and budget.

If you want help with crafting your business case or the next stages of your intranet project, then do get in contact with Brennan - we've even got some easy-to-deploy, quick-to-value pre-built solutions that could be exactly what your look for and can save you a lot of time and effort.

Good luck!

WHY ARE WE DIFFERENT?

We are uniquely positioned to design, manage, and optimise your complete IT environment, or just the parts you need help with, so your people can have a truly seamless technology experience, wherever they are working.

Our teams are crazy about delivering exceptional customer experience for our clients, which is why we continue to invest in our people, systems, and automation. This has resulted in us achieving world class NPS ratings of 80+.

Unlike nearly every other Managed Services Provider, Brennan offers a complete range of services across infrastructure, networking, end-user support, UC & telephony, IT security, hardware & software procurement, pre-paid support & project services, as well as bespoke business application development, such as CRM, intranets, and automation.

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