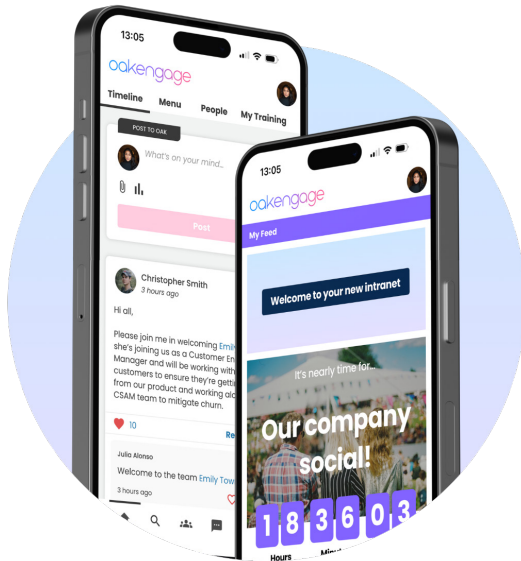


How to create an intranet business case

Step by step guide and template



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Creating an intranet business case

You know the importance of employee engagement, connectivity and effective communications, but does your leadership team?

With something as crucial to productivity and business performance as employee engagement, it's critical that your senior leaders understand how an intranet platform can help you to achieve your organisation's overall business goals.

What is a business case?

A business case was traditionally used to justify the cost and resource requirements. However, it is now one of the most powerful tools at your disposal when it comes to re-designing, investing or building an intranet.

When produced and delivered effectively, a business case will:

- Define the opportunity and business need
- Clearly set out the value and return on investment (ROI)
- Outline the scope, including resources, timing and cost
- Evaluate options and make a recommendation
- Ensure you gather the support needed to deliver on the project

A business case can make or break your project, so take the time to make sure you have been thorough and specific in your reasoning.

Preparation: Components of the business case

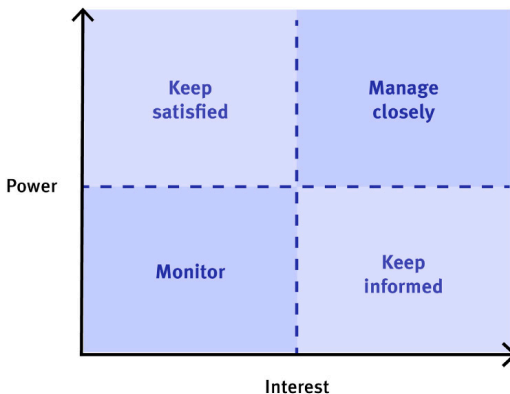
For many, the process of compiling a business case can seem a daunting task. In this guide, we'll outline the key steps you'll need to help you build an efficient business case.

Identify your stakeholders

The best way to identify your stakeholders and determine the level of investment they carry is by creating a simple stakeholder map.

Assign each stakeholder group a power level in the grid to visualise which decision maker you should speak to first. The key stakeholders whose buy-in you will need are likely to span IT, HR, internal comms, executive team and of course the day-to-day users, your colleagues.

The Power-Interest Matrix



Next, consider the priorities for each decision maker and any potential concerns about how an intranet could impact their role or processes.

Stakeholder priorities

IT

You should begin by addressing the overall security of the intranet platform that you are proposing. They will also want to know where it will be hosted, any potential integrations and whether it requires IT resources to build.

Internal communications

If you're reading this, you're most likely in internal comms. Reinforcing the ease with which you would be able to reach employees and ensure their messages are received and being read is a good place to start.

HR

Onboarding, employee happiness and retention will be big focal points for your HR colleagues, especially if these are already problem areas. Discuss elements such as streamlined and personalised employee onboarding, employee engagement and company culture.

End users

If you don't address the end-users concerns from the start, you risk low engagement with your new intranet. They will be looking for simple navigation and a user friendly, intuitive experience. Connecting and collaborating with colleagues across the wider business is also likely to appeal.

While day-to-day users may not have the power to make decisions, they will be the ones who contribute to its success, so having them on-side and catering to what they need remains important.

Requirements and timescales

You should always speak to stakeholders and/or any decision makers to identify any potential restrictions before beginning your intranet project and plan.

For example, some industries will likely have increased levels of compliance or restrictions when it comes to having company information on their intranet. If this factor concerns your company, all of these things will need to be considered in your project.

Timing can vary across different industries in terms of how long the project will take to develop. You will need to take into account when yearly budgets for your company are decided. This will also have an impact on when you'll be able to start implementing your intranet.

Assess your existing intranet or digital workplace

Audit your current intranet if you have one and identify areas for improvement, considering user needs. You should also identify the strengths and specific challenges of your current internal communications or intranet software to understand your needs from a new platform. Having this awareness will enable you to provide real life examples with clear reasoning for an upgrade to your decision makers.

Assessing the problems with your current intranet or digital workplace helps to provide a full picture of the challenges your people face on a day-to-day basis when trying to do their job. Visibility of this gives you a framework to work with, so you can start looking for possible intranet solutions that work for you.

Frequent intranet issues that companies face can include:

Technical issues

- Low performance
- Uploading errors
- Poor search engine
- Accessibility

Social & community

- Low engagement
- Lacks collaboration
- Declining usage
- Lacks connectivity

Productivity issues

- Can't prove ROI
- System inefficiencies
- Outdated documents
- Multiple platforms

Establish your opportunity

What needs are not met within your business that an intranet could solve?

Establishing your opportunity means outlining the specific problems in your company that your intranet is supposed to solve. To increase the opportunities for your intranet, you need to explore your business objectives.

There are two categories for business objectives:

- General objectives
- Specific objectives

Set your general objectives

General objectives are usually high-level and may be difficult to quantify. However, these objectives should be thought about in full detail as they will become the core objective for your solution.

Start by answering these questions:

- What are the current challenges each department is facing?
- Have departments already set any general objectives? If so, could an intranet help address these?

Some examples of general objectives could include:

- Improve connectivity and communication
- Increase collaboration
- Increase employee retention
- Make knowledge sharing easier
- Increase employee engagement

Set your specific objectives

Specific objectives are usually more specialised than general objectives.

They are often of value such as cost or percentage and you may know them as SMART objectives: Specific, Measurable, Achievable, Relevant and Time-bound

Some examples of specific objectives could include:

- Enhance knowledge sharing among store based colleagues by 50% in the next 6 months
- Improve building site staff retention by 40% in the next 18 months
- Increase overall employee engagement by 30% in the next 6 months

Identify pain points and challenges

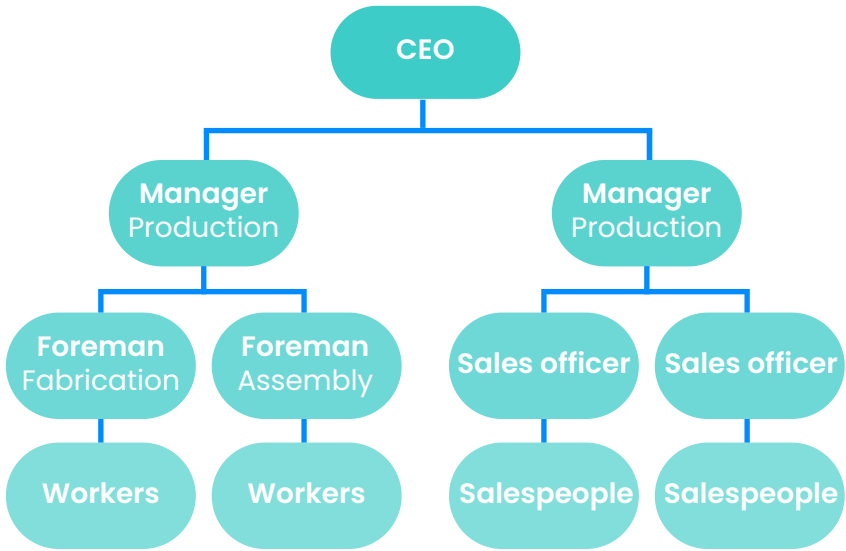
Getting the support you need for your intranet project means that you will have to start asking company-wide questions.

You need to listen to the different requirements and priorities of each department and understand what those at different levels within your organisation require from an intranet.

For example, do some staff require easy access to process documentation whereas others require collaboration spaces where they can engage with other departments?

Start with an organisational chart and identify the potential individuals and departments you'll need to speak to in order for you business case to get the backing it needs.

It's worth breaking down objectives by department and consider how an intranet will impact and benefit each one. We have visualised this on the next page.



Department	Example objective	Intranet approach
Sales & marketing	Speed up access to company information	Advanced search & integrations
HR	Faster onboarding & training	Knowledge base & information
Admin	Reduce email traffic & streamline comms	Targeted news & community hubs
Exec team	Keep staff informed on company news	Timeline & news features

Intranet requirements

Requirements for a new intranet could vary, depending on who you ask. Generally speaking, the requirements are usually divided into four groups:

The technical aspect:

Your company should require an intranet system that can provide modern features and performs a lot better than your current system.

Usability and information structure:

Your new intranet system should be easy to use.

Productivity:

Employees should save time by using the intranet.

Communication and collaboration:

Your new intranet system should encourage employees to communicate across departments.

Once you have identified your digital workplace requirements, this will form the basis of your business case.

It can also help to establish success criteria if, or when, the system is implemented, which will help you prove the return on investment. The process will ultimately increase the success of your new company intranet.

How does your organisation measure success?

You need to ensure that you are taking the right approach and using the correct metrics, before you begin calculating the return and value to your business.

These may include:

- ROI of intranet implementation
- Cost-benefit analysis
- Total cost of ownership
- Internal rate of return
- Employee retention & turnover

By identifying the metrics used by your stakeholders, it will ensure you answer all their priorities when evaluating the return cost.

Prioritise your objectives and key results

An intranet project is a large-scale transformation process which may need a few months to start seeing the true impact. Although the business case process is designed to provide a thorough overview, it can't realistically work out the return or value of every single objective.

That's why you should narrow your objectives down to 4 or 5 priorities that your stakeholders will deem the most important:

- Which objectives do they tend to use as the basis for decision making?
- Which key results are likely to deliver the most significant returns for your organisation?

Once you align the vision for your intranet with the business strategy, you can plan out your objectives. These objectives can come from employee focus groups or pulse surveys and existing data you have, but they're likely to fall into one of four categories.

Workplace culture and employee engagement

There are multiple statistics that correlate workplace culture and employee engagement with higher levels of productivity.

In Gallup's state of the global workplace report, it was revealed that highly engaged business units achieve a 10% increase in customer loyalty and engagement, and a 23% increase in profitability. Essentially, an engaged culture improves employee performance.

How an intranet helps

An intranet solution is a fantastic tool for combining the professional and social environments in a way that enhances organisation's culture and employee engagement. Using applets such as hubs, communities and timelines all helps improve workplace culture.

Collaboration

As more businesses offer remote working options for their employees, we can no longer just rely on in-person collaboration.

How an intranet helps

Solve collaboration challenges by providing a central platform for employees and teams to connect, engage, and collaborate, no matter where they are based. An intranet helps reduce unnecessary meetings and reduces the risk of staff working with incorrect or outdated document versions. It also helps organisations adapt to the change of new working ways.

Knowledge management

Almost every company struggles with isolated knowledge, especially when you don't have the right tools you need to facilitate it. From outdated versions to duplicated documents, it's no surprise that organisations who have poor knowledge management suffer from poor productivity and low employee engagement.

How an intranet helps

An intranet allows users to find the resources they need with ease. User permissions-based access to ensure the right people can access the relevant documentation for their day to day work. Short on time? Advanced search functionality can find what you're looking for in seconds. Empower your people to use an intuitive modern intranet with built-in FAQ's, how-to guides and walk-through videos with an always-available knowledge base.

Expected business impact

Once your objectives have been identified, it's important to determine the value of each one and how an ROI can be attributed to them.

If you've identified a broad objective, here are five questions that can be used to strip away the layers until you find a measure to assign to it.

- How is it measured?
- What is it now?
- What would you like it to be?
- What is the value of the difference?
- What is the value over time?

Here is an example of how to break down an objective to create a specific measure:

Decreasing the information search time

How is it measured?

Time spent searching/average of employees x100

What is it now?

2 hours a day spent searching for information

What would you like to be?

Reduced to 15 mins

What is the value in the difference?

2 hours a day = 10 hours a week per employee

What's the value over time?

10 hours x 1 year = approx. 60 days gained per person per year

Identifying the return for soft measures

Quantifying the impact for a broad objective can be difficult to measure. However, you can instead relate the achievement of that objective to wider business objectives.

Here is an example of a broad objective with soft measures:

Improved productivity

How is it measured?

Pulse Survey results (e.g. how productive do you feel at work?)

What is it now?

Average score 3/10

What would you like to be?

Average score 8/10

What is the value in the difference?

When employees are more productive, the workforce will become more engaged

What's the value over time?

Increased engagement, increased sales and improved company culture

Intranet marketplace

You've identified your stakeholders and established your opportunities, now it's time to start outlining your intranet plan.

Looking for alternatives

By the time you reach the point of developing a business case, you may have already selected an intranet solution that you hope to progress with.

It will, however, help your case if you can demonstrate to the decision makers that you have taken a detailed approach to researching all possible options.

When deciding on an intranet, options that are typically evaluated at this point include:

- Do nothing
- SharePoint
- Oak Engage
- Self-build
- Other vendors

But how do you identify the right intranet option for you?

You can quickly identify the big players using a Google search. You can also reach out to your network or online communities on LinkedIn for feedback and insight from others who use a particular platform.

A key factor that your decision makers will want to understand is the cost.

Analysing alternatives

Next, it's time to analyse each of your selected options in line with your objectives that we went through earlier.

Even if you know which option you will be putting forward to your decision makers, it's best to be as transparent as possible.

Your list of vendors will usually fall into three categories:

Functionality

- Consider the specific features and capabilities of the solution
- Compare and align the features from each option to your objectives

Cost-benefit analysis

- Consider the direct and indirect costs of investment versus returns
- Include any spend that falls outside the software itself (e.g. launch and training activities)

The perfect match

- Consider the bigger picture of your potential intranets (e.g. customer base, experience, reputation, stability of company, cultural match)

Direct costs

Your direct costs will vary depending on the solution you select. However, you will need to consider both the upfront and future cost.

Technology

- Software
- Maintenance
- In-house expertise
- Integration
- Development

Implementation

- Strategy
- Project Management
- Design
- External Training

Don't be tempted to downplay or cut back on the anticipated implementation costs. Evidence shows that 75% of business and IT executives anticipate their software projects will fail due to cutbacks so be clear from the outset and highlight its importance.

Indirect costs

Your indirect costs will involve activities and resources that fall outside the quoted direct cost from your preferred intranet vendor.

A successful intranet will often include launch activities which will have an additional cost that you will need to consider.

These components are key to both the initial and long-term success of your intranet and should therefore be considered within your business case.

Indirect costs could include:

- Employee resources
- Management changes
- Launching activities such as a launch party or learning sessions
- Support costs
- Internal training for employees & leadership

Cost-benefit analysis

The next step is to compare like-for-like costs for different intranet vendors. Building a cost comparison and analysis on your selected options will bring together all the information you need in a clear and concise view for your stakeholders and decision makers.

Assessing risk

Following your analysis, you can identify any possible risks. A risk assessment within your business case is crucial to persuading decision makers that you have thought about what to do if anything goes wrong.

Risk can be associated with either the implementation or the outcome.

Implementation risk refers to the proposed investment , i.e. your chosen intranet software, that may deviate from the original plan.

Outcome risk refers to the needs of your organisation. Consider the scenario if they are not met. Lay out the potential risks in terms of how likely they are to occur and the impact that they could have on the project or business.

By writing out each of your objectives in simple terms, you can clarify what you want to achieve and identify any associated risks.

It could look something like this:

“Our main goal is to acquire intranet software that improves employee engagement, centralises company information and increases business connectivity. It should take approximately two months to migrate previous documents and train all employees on the software. The project will require the help of and the potential risks include...”

Choosing your intranet solution

The final step is to evaluate all of the information you have collected and decide on the intranet solution you will progress with. Make sure you deliver your intranet business case in a persuasive way to get your stakeholders and decision makers on board with your decision.

Here at Oak, we combine all the intranet features that employees love, to create an innovative workspace solution to suit your company needs.

Choosing the best company intranet for your organisation can be a daunting process. That's why we support you every step of the way. You'll receive help and guidance from our experts right from the beginning and have regular check-ins with the team to make sure you get the most out of our platform.

If you decide we're the perfect match for you, you'll have access to regular, free online webinars and strategy days to maximise your knowledge and make your intranet work in the best way for your business.

Intranet business case template

Now it's your turn to collect all the research you've accumulated and present it to your stakeholders.

To help bring your business case to life, we've created a free template to create your own business plan.

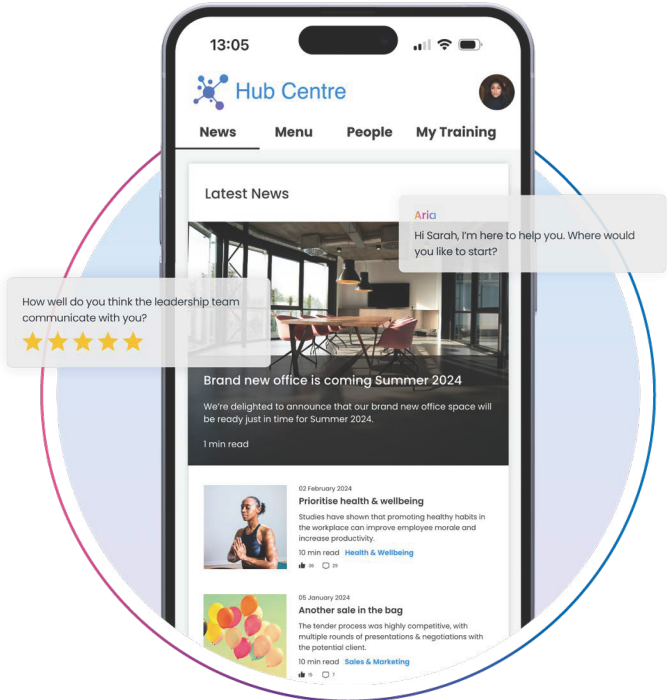
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