

ThoughtFarmer

WORKBOOK

Intranet Buyer's Guide

A clear path to a new intranet



— Trying to select a new intranet?

This easy-to-read guide leads you through the 10 key steps that are critical to the evaluation and purchase process.

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STEP ONE

Determine business objectives

You need to decide why you need a new intranet. The most reliable method for researching intranet needs is via interviews, either in-person, email, or by phone. You should aim to conduct interviews with both key stakeholders and five or more representative end users. The goal of the workshop is to achieve consensus on the purpose of the new intranet and how you will achieve it.

Action Plan

Select 5–10 questions you will use for your live interviews.

Sample interview questions

- Describe the function of your team / department.
- Describe your role.
- What does a typical day look like for you?
- How do you find the information you need to do your job?
- What activities do you like most? Least? What is the most time consuming?
- Who do you work with closely? What do you work on? How?
- Who do you communicate with regularly? Why? How?
- What are some of the communication and collaboration barriers you see in today's workplace?
- What are the most important priorities and goals in your team / department right now?



- What applications does your team / department use to get work done?
- Tell me about the current intranet. What do you like most? Least?
- How do you think the intranet could help you achieve the goals you mentioned?
- Additional questions you will use:

Your interviews will uncover dozens of business objectives. While some may be unique, many will be related. Find the top 3–5 business objectives for your intranet. Remember, these are not features. These are business needs or pain points that your new intranet will help solve.

Action Plan

Pick the top 3–5 business objectives for your intranet.

Sample business objectives for your intranet

- Ensure all employees receive important company communication.
- Improve findability of information and documents needed to do daily tasks.
- Improve employee engagement scores.
- Allow employees to access information and documents from home and mobile.
- Provide easier ways for geographically dispersed teams to collaborate on projects or documents.
- Simplify and standardize onboarding processes.
- Reduce time spent reading and answering email.
- Fix intranet technical issues like slow speed and broken search.
- Target communication to certain groups/teams/individuals
- A place for employees to connect and feel connected to their culture.
- Opportunity to broadcast critical information
- Integrate with existing applications (Google/Slack)



STEP TWO

Assemble your team

Select a team that:

- has the authority to get things done
- is committed to your business objectives
- is small enough to act with efficiency

The following list includes some of the roles and job titles that are common on intranet teams.

Action Plan

Pick the top 3–5 business objectives for your intranet.

Sample business objectives for your intranet

- Communications Manager / Director:
- HR Manager / Director:
- IT Director or CIO:
- Executive Sponsor:
- Project Manager:
- Intranet Manager:

Representatives from departments impacted most by the intranet:

Title**Role**



STEP 3

Communicate your requirements

Expand the business objectives you defined in Step 1 into more granular and specific requirements. Using the information gained from your interviews, plus any additional research and observations, ask yourself the following:

- Who's the user?
- What do they want?
- Why?

Including the context (who and why) allows vendors to recommend alternative solutions that may better accomplish your goals. Here are three examples of user requirements:

AS A... (WHO)	I WOULD LIKE... (WHAT)	SO THAT... (WHY)
User	To be able to post blogs about the things I am working on	People can keep up to date with things I do, which may be relevant for them as well
Intranet Manager	Usage statistics	I can see how the intranet is being used and report back to the intranet team
IT Director	Active Directory integration	We can manage intranet users using our existing IT provisioning process



Action Plan

Select the requirements for your intranet. Then add additional ones specific to your company. Make sure the business objectives you defined in Step 1 are fully satisfied.

AS A... (WHO)	I WOULD LIKE... (WHAT)	SO THAT... (WHY)
User	One place to go where I can access all the tools I need	I don't have to keep track of numerous URLs and log-ins
IT Director	Active Directory integration	We can manage intranet users using our existing IT provisioning process
Communications Director	Newsfeeds that display updates from the company, department, team, and location	Employees receive timely, relevant communications that are tailored to them
Project Manager	A team area where we can store file versions and updates	Cross-functional teams can easily organize documents and collaborate on projects
Marketing Director	Integration of external newsfeeds, like company blog, Twitter, and Facebook	Employees can have two-way conversations on the intranet and increase engagement and trust
HR Director	Improve new employee onboarding while having tools to promote collaborative working including forums, groups, comments, and likes.	My staff can efficiently find the information they need
Intranet Manager	Usage statistics	I can see how the intranet is being used and report back to the intranet team
CEO	A blog to post company updates to all staff	I can engage with our employees in a personal way, and read and respond to their comments



STEP FOUR

Define business constraints and limitations

Consider your business constraints and limitations, including budget, timeline, languages, and specific IT requirements. Also consider if you have the resources to implement the intranet yourself or if you want professional consultation and support.

Action Plan

Fill in the business constraints that you must work within.

Budget

One-time cost: \$..... *minimum* to \$..... *maximum*

Recurring cost: \$..... *minimum* to \$..... *maximum* per *month/year*

Timeline

Intranet launch date: *dd-mm-yyyy* to *dd-mm-yyyy*

Languages for user interface

<input type="checkbox"/> Chinese Simplified	<input type="checkbox"/> Japanese	<input type="checkbox"/> Turkish
<input type="checkbox"/> Dutch	<input type="checkbox"/> Korean	<input type="checkbox"/> Other:
<input type="checkbox"/> English	<input type="checkbox"/> Portuguese	
<input type="checkbox"/> French	<input type="checkbox"/> Russian	
<input type="checkbox"/> German	<input type="checkbox"/> Spanish	



IT constraints

- Cloud-based (software and hardware managed by vendor)
- Integrated with Active Directory
- Microsoft server hardware only (e.g., Windows Server, SQL Server)
- Other IT constraints:

Required professional services / consultants

- Installation and configuration
- Navigation design / information architecture
- Training
- Custom coding / extensions / integrations
- Other required services:



STEP FIVE

Research your options

Research the available options. There are dozens of potential solutions. You may find it helpful to quickly eliminate some options based on the preferences below.

Action Plan

Consider the following broad categories of solutions.
Circle the option you require.

Build or buy

How unique are your requirements? Building your own intranet (using SharePoint, an open-source CMS like Drupal, or some other platform) allows for many customizations, but comes with a high labor cost, lengthy development times, and potential difficulty with future updates. Choosing an out-of-the-box solution allows fast deployment, frequent software upgrades, and ongoing maintenance and support. Which is best for you?

Centralized or Distributed

Websites, often powered by a CMS like WordPress, are typically centralized systems: a small group of administrators maintains content that is consumed by a large group of users. Intranets traditionally followed the same model, but today many intranets are distributed: most users of the system are also, to some extent, authors. Can your business objectives be met by a system that is centralized? Or do they require a system where authorship is distributed?

Self-Hosted or Cloud

Host your intranet remotely in the cloud to ease your workload, or self-host your intranet for complete control. While both have benefits, Cloud-based solutions don't require an install, and are built to be scalable, making it easier to add users, storage space, and additional functionality as needed. Cloud-hosted intranets are also actively monitored and optimized for intranet security, fast speed, and high concurrency to ensure customers get up and running quickly.



Action Plan

Research available intranet solutions. Make a list of solutions that appear to meet your criteria, and a list of solutions that do not.

Intranet solutions: Potential fit

These solutions address our business objectives and fit within our limitations and constraints.

Solution name	Notes

Intranet solutions: Not A fit

These solutions **do not** address our business objectives or fit within our limitations and constraints.

Solution name	Notes

Notes

The balance of the Intranet Buyers Guide assumes the decision is to Buy rather than Build.



STEP SIX

Request initial demos

Choose three or more vendors who appear to meet your needs

Intranet solutions are typically much more complex and configurable than consumer software. Therefore, the fastest way to find out whether a potential solution is a good fit is to request a live conversation and demonstration. An effective salesperson will ask questions and demonstrate scenarios that will help both parties determine whether there is a potential match.

Spending time with a free trial is also very beneficial, but it will be much more productive after an initial demo.

Action Plan

Evaluate each vendor against the business objectives you identified in Step 1, and the constraints and limitations you defined in Step 4.

Vendor 1

- Can address our top business objectives from Step 1
- Meets most of our requirements from Step 3
(you will evaluate this more closely in Step 7)
- Fits within our constraints and limitations from Step 4:
 - Budget
 - Timeline
 - Language
 - IT requirements
 - Professional services



Vendor 2

- Can address our top business objectives from Step 1
- Meets most of our requirements from Step 3
(you will evaluate this more closely in Step 7)
- Fits within our constraints and limitations from Step 4:
 - Budget
 - Timeline
 - Language
 - IT requirements
 - Professional services

Vendor 3

- Can address our top business objectives from Step 1
- Meets most of our requirements from Step 3
(you will evaluate this more closely in Step 7)
- Fits within our constraints and limitations from Step 4:
 - Budget
 - Timeline
 - Language
 - IT requirements
 - Professional services



STEP SEVEN

Request free trials

Shortlist 2–3 vendors and request a free trial

Which of the vendors you met with:

- Can address your top business objectives?
- Meets most of your requirements?
- Fits within your constraints and limitations?

Contact those vendors and request a free trial. During the trial period, systematically test the software against the requirements you defined in Step 3. It is easy to get sidetracked by features that may be interesting but do not address your business needs. Stay focused on your objectives and requirements.

Action Plan

Collect a matrix based on your requirements from Step 3.

Here's a sample fragment of a matrix:

Action Plan
Evaluate each vendor using your matrix.

As a... (who)	I would like... (what)	So that... (why)	Vendor 1	Vendor 2
User	To be able to post blogs about the things I am working on	People can keep up to date with things I do, which may be relevant to them as well	Yes	Yes
Intranet Manager	Usage statistics	I can see how the intranet is being used and report back to the intranet team	Yes Included	Yes. Add-on cost
IT Director	Active Directory integration	We can manage intranet users using our existing IT provisioning process	Yes	No Can do one-time import



STEP EIGHT

Conduct stakeholder demos

Request an in-depth meeting or demo with shortlisted vendors and your key stakeholders

This final demo serves two purposes:

- Gain full support from your key stakeholders to move forward with one of your shortlisted vendors.
- Evaluate vendor intangibles. Can they deliver? Will they be a pleasure to work with?

Use the sample agenda below to accomplish this.

Action Plan

Book a final demo with vendor and stakeholders. Use sample agenda below.

Stakeholder demo agenda

5 min **Introductions**

40 min **Business objectives**

Vendor demonstrates how software addresses your top three business objectives from Step 1. Allow plenty of time for Q&A after each objective.

15 min **Requirements**

Vendor demonstrates how software meets 3–5 of your functional requirements from Step 3—particularly ones that were difficult to evaluate during free trial. Allow time for questions throughout.

15 min **Constraints**

Discuss constraints and limitations from Step 4—especially where there could be a potential issue, such as cost, timeline, or IT infrastructure.



5 min	Experience and Customer Support
	Vendor shares screenshots and case studies from implementations where the organization or user scenarios are similar to yours. Allow time for questions throughout.
5 min	Implementation
	Vendor discusses how the implementation would proceed. How soon can it be delivering business value? What are the key steps? What assistance will the vendor provide?
5 min	Q&A
	Open questions and answers.



STEP NINE

Pick your preferred product, check references

By now you have a preferred vendor. Just as you would when hiring an employee, an important final step is to request and check references. There are many questions you could ask the vendor's clients, but the most revealing one is this:

If you could do it over again, would you buy from them?

Action Plan

Request 2-3 reference clients from the vendor. Phone or email each one.

Reference 1

Name

Title/Company

Phone/Email

If you could do it over again, would you buy from them? Why / why not?



Reference 2

Name	Title/Company	Phone/Email
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If you could do it over again, would you buy from them? Why / why not?

Reference 3

Name	Title/Company	Phone/Email
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If you could do it over again, would you buy from them? Why / why not?

Additional questions to ask references:

If you could do it over again, would you buy from them? Why / why not?

How easy was it to set up, and now to use?



STEP TEN

Finalize purchase

Request an official proposal or contract from the vendor. Depending on the size of your organization, your procedure for reviewing contracts and finalizing procurement will vary.

Some key points to review in the proposal:

- Aside from use of the software, what is / is not included in the price?
- What is the total year one cost? Year two cost? Year three cost?
- What are the payment terms?
- What happens if our company grows?
- How can we terminate the agreement? What happens?

Action Plan

Request an official proposal. Review, considering the points above. Revise if necessary. Sign!

Hopefully these 10 steps lead you through a straightforward but thorough evaluation and purchase process. Once you actually commit to a vendor, however, that's when the real work begins. Further assistance and advice is available on our [Resources page](#), or our [Intranet Blog](#).

Thanks for reading!

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