

Chapter 1: Building the business case

Introduction

Your firm has asked that you explore what it would take to develop an intranet or whether you think the firm's existing intranet needs updating, right-sizing, etc. No matter how the project begins and ends, somewhere along the way you will need to justify the resources used to do the work. While many think that building an intranet is more about the technology, creating a successful intranet, like any big project, starts with building support for it within your firm. Building a justification for the expense, doing the upfront planning and the thinking that goes into a business case will put structure around the project.

What is a business case? Briefly, a good business case includes the following seven components:¹

- Identifying the situation or current problem;
- Describing the project;
- Describing a potential solution;
- Providing a cost and benefit analysis;
- Identifying an implementation timeline;
- Identifying critical assumptions and risks; and
- Conclusions and recommendations.

While developing a business case, ask a few questions. What makes an intranet successful? Why do intranet projects fail? Why invest in a redesign or significant change to the firm's intranet? Thinking through these issues and others and writing a good business case are

critical to getting the support necessary to make an intranet project successful.

What is a business case?

According to the Association for Project Management (APM) in its *APM Body of Knowledge*,² a business case provides justification for undertaking a project, in terms of evaluating the benefit, cost and risk of alternative options and rationale for the preferred solution. Its purpose is to obtain management commitment and approval for investment in the project. In terms of justifying an intranet project, a well-thought out and well-written business case does the following for its readers:

- Describes the business issue(s) a new or redesigned intranet will solve;
- Describes what to expect during the project;
- Provides an outline for a project management plan;
- Confirms the need;
- Verifies that the solution meets the business need;
- Creates a level of comfort about cost and risk; and
- Improves communication regarding the project for all involved.

Who should write the business case?

Before beginning to draft a business case, it is important to think about who needs to be involved in the writing. While it is tempting to do it alone or ask for input from

a few people close by, involving others in the organisation who can look at it from different perspectives will make the case stronger while building support within the organisation for moving forward. In essence, the writing should be done by one writer with multiple contributors.

Contributors

Ask for thoughts from those who will be using the intranet. To do that, spend time talking to potential users about what keeps them from doing what they need to do, when they need to do it. What do they want from an intranet? What impediments do they have in their work? How hard is it to locate information when they need to? What is the biggest issue they deal with on a regular basis? Record the answers and deliver them to the writer.

Writer

The writer should be someone who understands the business issues/needs, has an overall understanding of what an intranet can do and understands the basics

of business cases. They not only have to write from their viewpoint but will also need to synthesise the multiple and varied contributions into one document.

Elements of the intranet business case

1. Situational assessment and problem statement

Assess the issues an intranet would solve. Don't problem solve yet. Just state what problems are behind the decision to want to build or redesign the intranet. Statements within this section could include:

- It takes too long to update the intranet;
- We have a backlog of work that needs to be done but find that we don't have time to develop new features and functions;
- Lawyers don't have access to marketing materials at the point of need; and
- Matter information, documents, billings, etc., are all kept in disparate systems – there is no central location where one

Problem statement	Goal
It takes too long to update the intranet.	All content management will be distributed to content owners who will be able to update their own intranet web pages.
We have a backlog of work that needs to be done but find that we don't have time to develop new features and functions.	Development of intranet applications will be done at two levels. One – work on more complex applications and web pages will be done by developers using development tools and custom coding. Two – the work to set up simple pages and content repositories will be done using a tool that non-programmers can use.
Lawyers don't have access to marketing materials at the point of need.	The intranet will provide a central location for marketing materials along with best practices in the use of those materials.
Matter information, documents, billings, etc., are all kept in disparate systems – there is no central location where one can find all the information on a matter that the law firm keeps.	The intranet will provide a matter-centric view of firm systems where there is a single location to find all content, data, knowledge, billing data, etc., regarding a client's matter.

Table 1: Example project description

can find all the information on a matter that the law firm keeps.

Keep the assessment and problem statement at the highest level by focusing on the big picture rather than details. Address the details in the solution description.

Describe whatever issues should be included in relation to the firm's historical and current environment. For example:

- How does the issue affect the firm?
- What external forces are in play?
- Who is affected by the issue?
- What actions have been tried before?
- What were the outcomes of those attempts at solving the problem?

Finally, think about the firm's business goals. How can the intranet support them?

2. Project description

The project description defines the issue resolution or objective of creating an intranet. Include goals, timeframe, resources needed and cost. This element is most similar to a project plan and restates the issues in the style of a goal. This is where problem-solving begins. Depending on the input from contributors, the statements made during the situational analysis can become goals for how the intranet will work and what it can provide the firm. See Table 1 for an example.

The timeframe tells the decision makers when they can expect the project to start and end, while resources needed describes the people, software and other resources that will need to be dedicated to the intranet to insure its success. Finally, the cost provides a breakdown of what each resource will cost.

3. Solution description

The solution description goes further to describe in some detail how the project will

be conducted and what the specific solutions will be. It identifies processes and outcomes, and includes an overview, detail and alternatives. This is where you can use the process model described in Chapter 3.

- **Research** – conduct a needs assessment including user needs, technology options, etc.;
- **Design** – design the site architecture and look and feel of the site;
- **Develop** – develop based on needs and design;
- **Rollout** – rollout to end users; and
- **Measure and maintain** – measure success, make improvements as needed and conduct maintenance on an ongoing basis.

The chapters that follow will provide more detail that may be included here as necessary.

4. Cost and benefit analysis

Cost/benefit analysis includes the cost of the project, along with the benefits and any estimates of the return on investment (ROI). Begin by stating the total cost of the project, providing more details as requested. Once that is stated, list the benefits – they can be the goals restated as benefits. After a simple list of the benefits, repeat each benefit with a description and specific examples of the return on investment. See Table 2 for an example.

5. Implementation timeline

This section provides a list of tasks with due dates. It also identifies which tasks are milestones (significant tasks where the project will have a problem being completed on time if the due date slips). Table 3 shows some examples.

<p>The cost for building [redesigning] the intranet including all phases is [\$\$\$\$]. The benefits of going ahead with the project are:</p>		
Goal	Benefit	Return on investment
<p>All content management will be distributed to content owners who will be able to update their own intranet web pages.</p>	<p>The intranet will be kept up-to-date, reducing the time spent in search of information by lawyers and staff and providing more productive time for client work.</p>	<p>(Time saved that would have been spent in searching for information) x (average of lawyer billing rates) = potentially billable time</p> <p>(Time saved that would have been spent in searching for information) x (average of staff salary) = money saved by not hiring staff who would spend time on other tasks</p>
<p>Development of intranet applications will be done at two levels. One – work on more complex applications and web pages will be done by developers using development tools and custom coding. Two – the work to set up simple pages and content repositories will be done using a tool that non-programmers can use.</p>	<p>Faster turnaround to enhancement requests for improvements or new features on the intranet, as well as the developer’s time being available to spend on more complex tasks.</p>	<p>Individual assessment of user time spent before and after applications or functions are developed. Time spent at task before new functionality is added minus time spent using new intranet tool. For example:</p> <p>(Time spent manually filling out administrative forms and delivering to accounting) – (time spent filling out electronic forms and submitting them electronically to accounting) = time saved for other tasks</p>
<p>The intranet will provide a central location for marketing materials, along with best practices in the use of those materials.</p>	<p>Lawyers will be better prepared to meet with prospects and/or cross-sell to existing clients.</p>	<p>(New matters during a specific number of weeks before putting the marketing material repository in place compared to new matters opened during the same number of weeks after the repository is put in place) x the value of those matters</p>
<p>The intranet will provide a matter-centric view of firm systems where there is a single location to find all content, data, knowledge, billing data, etc., regarding a client’s matter.</p>	<p>Lawyers will have a desktop they can work from that has the documents, billing information, etc., they use most often.</p>	<p>Anecdotal evidence that time is saved that can be repurposed.</p>

Table 2: Cost/benefit analysis

Research	Date due
Conduct attorney and staff interviews	
Review helpdesk logs	
Gather site metrics	
Research technology solutions	
Design	
Review feedback from interviews, identifying patterns and initial recommendations	
Develop design based on patterns in feedback	
Develop	
Prepare request for proposal (RFP) sections to send to developers	
Send RFP to selected vendors	
Respond to questions, collect responses	
Schedule and facilitate product demonstrations	
Compare selected vendors side-by-side based on RFP requirements	
Select appropriate vendor and document decision process	
Communicate decision to vendors	
Manage software installation	
Manage vendor customisations	
Rollout	
Develop and initiate communication plan	
Develop and conduct training	
Measure and maintain	
Manage set up of initial monitoring for site usage metrics compared to initial benchmarks	
Develop satisfaction survey	
Conduct satisfaction survey and analyse responses to gauge success	

Table 3: Implementation timeline
 Note: The tasks listed are not meant to be exhaustive.

6. Critical assumptions and risks

This component deals with assumptions that were they not to occur would have a dramatic effect on the project, and risks that are being taken that may create adverse issues. For example, an assumption would be that the IT staff has time to work on

the development of the intranet. If this assumption is untrue, the project would be delayed as other IT projects take priority. A risk might be that the intranet does not meet firm needs as intended.
 Besides stating these risks and assumptions, the intranet project team would

also want to state what actions could be taken to prevent problems occurring or the project being delayed.

7. Conclusions and recommendations

This part of the business case provides decision makers with a review of the business case, including:

- Summary of the issues;
- Restatement of the goals; and
- Review of the cost, benefits and ROI.

Make sure to convey that issues raised need immediate attention and that it is time to move ahead when the proposed intranet project is approved.

8. Executive summary

Once the business case is completed, create an executive summary. This summary will be located at the beginning of the document. Executive summaries provide a high-level discussion of the larger document. To write it, select the most important points and keep it to one or two pages.

How to get decision makers to read your business case

The final step in writing a business case is to review it for readability. When reviewing the document consider the following.

Did you:

- Make it interesting?
- Keep it clear and concise?
- Minimise jargon?
- Communicate facts? Don't conjecture.
- Size the document to fit the size of your project?
- Provide a picture or vision of the outcome?
- Demonstrate the value?

Conclusion

A successful law firm intranet does not happen without planning or support. Creating a business case will provide both the support needed to get started and the beginning of a plan to continue moving forward. The time spent up front will be well worth it.

References

1. Prosci, *BPR Business Case Toolkit*. Retrieved 13 May 2009 from www.prosci.com/t3.htm.
2. Association for Project Management, *APM Body of Knowledge*, 2006. See www.apm.org.uk.

Chapter 2: Governance and staffing

Introduction

As part of getting buy-in for your intranet project, the governance model has already begun to form. This important step of defining governance and staffing will help set expectations, assign priority and make decisions.

There are two types of governance that should be in place for a law firm intranet – project and long-term. Before starting an intranet build or redesign, it is critical to identify and communicate the criteria that will govern the roles, responsibilities, decision-making, success measurements and accountability of all members of the project team. Once the intranet is launched, these same things need to be addressed, especially if members of the team change.

Four important areas of governance should be considered:

- Who to include;
- Critical roles;
- How to make good decisions; and
- How to measure success.

The following sections go over these areas in detail.

Who to include

Intranet staffing or intranet team size is often an issue once an intranet goes into production or as the demand for new resources/content grows. To many firms, the idea of having even one full-time person assigned to manage the intranet

seems excessive. Additionally, what works for one firm may not work for others because their needs are so different. Still, using benchmarks to determine the size of the team can be a good start. Jane McConnell's 'Global Intranet Trends' survey report contains benchmarks and provides a summary of the numbers from her survey:¹

- Fewer than 1,000 employees – three intranet headcount;
- 1,000 to 5,000 employees – eight intranet headcount;
- 5,000 to 15,000 employees – 12 intranet headcount; and
- 15,000 to 30,000 employees – 19 intranet headcount.

These numbers are not specific to law firms, of course, but do give a good idea of how other companies handle intranet staffing as a general rule. Each law firm must determine what makes the most sense to manage its own intranet effectively. The main things that any intranet needs to be successful are a governance board to get things started and make decisions, a project team to manage the project from beginning to end, and a task force of users to provide testing and ongoing feedback.

Governance board

Assigning and utilising a governance board, also called a steering committee or advisory group, is a way to keep your intranet project on track and moving forward

with the support it needs. The governance board provides input on critical content and requirements, supports the basic functions of the intranet, agrees with and promotes the intranet strategy, and aligns that strategy with the overall firm business strategy. Included on the governance board should be a combination of the following:

- Chief information officer (CIO);
- Administrative director;
- Management committee member;
- Technology partners;
- Senior partners;
- Practice group or practice area leaders;
- Intranet manager or project manager;
- Department heads; and
- Senior managers from the information technology (IT) department.

Including high-profile members on the governance board can help remove potential political obstacles by creating very visible and respected advocates for the intranet project. Ideally, the governance board members will speak out in favour and defence of the intranet and how it benefits the firm. They can also provide an official 'sign off' of the project and the implications for the firm as a whole.

Project team

The intranet project team is the group that will carry out the directions of the governance board and implement the actual tasks and plan for the intranet project. This group membership may be wide and varied, but all will most likely be united and dedicated to the intranet project. Some key project team members include the following.

Intranet manager/project manager

If your firm is lucky enough to have a dedicated staff member who oversees the

inner workings of the intranet, that person is going to play a key role in a redesign. The intranet manager typically co-ordinates and oversees all intranet projects, leads the development of the intranet strategy, owns policies, procedures and guidelines, approves requests and communicates with the rest of the firm. In a redesign project, however, the intranet manager need not be the official project manager to be a critical member. In fact, sometimes it is a better idea to have a separate project manager who can be a task master and facilitator of the project team, while the intranet manager contributes directly to the project by collaborating and sharing expertise.

Librarian/researcher

The firm librarian or library department should be involved in developing and choosing the content of your intranet and in ongoing intranet projects. Their interaction with practices, administration and all levels of staff provides them a unique view of how the firm works and how information flows through the firm. They also have a lot to add around the topics of categorisation, taxonomy and content organisation. They work heavily with websites and services and possess skills in the evaluation of web services for content and usability.

Part of a law firm librarian's job is to foster relationships with partners, associates and new lawyers surrounding resources and library services training. If you also have them involved in your intranet project (whether on the governance board, project team or task force), they will be armed with good information to pass along to the people they talk to and train on a daily basis.

Designer

The designer(s) on the project team will create and own the look and feel of your

intranet project. This may include, but is not limited to: interface design, colour scheme, font selection, use of style sheets and general appearance. This role might also be involved in usability testing and user-centred design and functionality.

The designer could be part of the firm's marketing or communications department, in charge of firm branding issues or involved with the firm's external website initiative. Conversely, the designer could be an outside contractor scheduled to work on the intranet project for a specific period of time, if no existing resources are available at the firm.

Developer/information technology

The developer(s) on the project team will create and/or manage the creation of the technology and applications for the intranet project. This role will also develop code, determine needs and requirements, and provide insight on platform, programming and technology issues related to the intranet project.

The developer(s) can be internal existing staff dedicated to the intranet project, or they could be hired outside consultants who have specific expertise that is necessary to further the intranet project's progress. It all depends on the firm resources available to work on the intranet project.

Content manager

If you are tackling a full intranet redesign or major project at your firm, the role of the content manager is vital. This person will be in charge of tracking the current content, importing old content into potential new formats, performing a site audit, determining shelf-life and managing outdated information. The content manager will be involved with more of the day-to-day functions of the intranet project and rollout.

Task force

The task force is made up of users and led by the intranet manager or project manager. The role of the task force is to assist with testing, participate in pilot groups, provide feedback and liaise with the rest of the firm. Specific roles on the task force include:

Subject matter expert

The people in each administrative or practice group or area who maintain and manage the information for their group are considered subject matter experts who own their areas of content. These people can update and maintain information specific to their groups or areas on an ongoing basis. They are also the most familiar with existing available information, whether it is intranet-based or not. Use subject matter experts to identify issues, new content, existing gaps, expired content, points of failure and opportunities for improvement.

Practice group/area liaison

Every firm relies heavily on legal administrative assistants and paralegals for core business activities to support lawyers, associates and other legal staff. Identify the people (whether secretaries, paralegals or associates) to whom everyone else goes when they have questions. Those people will serve as excellent references to help promote the intranet project to others, as well as to give insight into specific practice issues or areas of need.

Knowledge worker

Knowledge workers are those at the firm who, whether in title or not, manage the information that can be internally shared and reused for the benefit of the firm. They might be involved with a contact relationship management system, a judges database, a collateral collection, deal tracking software