**Intranet Solution Evaluation Workbook**

This workbook, along with other resources like whitepapers and videos, is designed to not only educate you on what you want and need from an Intranet but also provides a printable checklist that can be used to compare different Intranet solutions.

Evaluating Intranet solutions and packages for your organization can be daunting and time-consuming. Whether it is a new Intranet your organization is looking to deploy or just replacing an existing one, the objective is often the same: ***to provide an organizational hub for employees to more effectively communicate and collaborate, and make it easy to do business internally.***

The key to a successful Intranet that will work with your organization both now and in the future is determined by how you set it up, deploy it, and the type of package you choose. With the introduction of new cloud platforms like Microsoft's Office 365, organizations have a wealth of powerful, versatile options.

This checklist was developed by Office 365 and SharePoint experts who have deployed more than 700 Intranets across all industries around the world. Because an Intranet affects your entire organization, the decisions you make today will greatly impact effectiveness tomorrow.

**Before you begin with the checklist, here are some basic questions to ask yourself:**

**1. What does our organization want to accomplish with an Intranet?**

Improve communication by providing a central place for organizational announcements, news, and events

Increase collaboration and facilitate sharing of ideas, tips, and competitive information

Consolidate siloed departmental processes, procedures, and policies

Create an organizational hub that will grow with our organization

**2. How will the Intranet fit in with your platform and organization?**

Will the Intranet be standalone OR part of a larger platform like Office 365

Will the Intranet need to integrate with email, an office suite, document management, and online meetings

Is the Intranet built on a standard platform that we can use for other purposes and be trained on

In the future, will the Intranet look separate OR be part of an overall organizational ecosystem

Will the Intranet be able to leverage new technologies in the future AND will these new technologies be able to integrate naturally with the Intranet’s design

What is our vision for the Intranet in five years? Can the solution we choose grow with our platform and our business needs?

**3.** **How much control over the Intranet will our organization have?**

Are we able to update, modify, and make changes to the Intranet ourselves internally OR will we need to hire an outside consultant

If we choose to do it ourselves internally, are we willing to train an Application Administrator to manage the Intranet portal internally

Does the Intranet solution allow Content Managers and end users to work with it without requiring heavy formal training

If you choose to hire an outside consultant, is management willing to pay monthly fees associated with that

***To learn more about choosing an Intranet solution, read our whitepaper***[***Deploying an Intranet on Office 365***](http://www.spmarketplace.com/sp-marketplace-white-papers.html)

**Using the Comparison Worksheet**

*The worksheet is broken up into the following sections:*

**Core Platform**

This section goes into the type of platform on which your Intranet solution is or will be deployed. When comparing different Intranet solutions, look at the Intranet features and whether they conform to Microsoft guidelines. This section also will go into how the Intranet will be impacted by future updates.

**Intranet Structure**

This section goes into what comes with the Intranet you choose, out of the box, and how the Intranet’s structure is set up to meet the needs of your organization.

**Intranet Branding**

This section will ask about how the Intranet solution your organization chooses fits in with Office 365 and Microsoft branding guidelines. It also will ask about the level of difficulty involved with changing the branding and customizing it to your organization’s needs.

**Content Management**

This section goes into the types of content that will be displayed on the Intranet and how the content is updated and added. Additionally, choices in this section will ask about automating content and the roles of content managers with updating the content.

**Flexibility and Customization**

This section goes into the flexibility of changes to the Intranet and the role that an administrator has with the Intranet and the level of training required. This section also will touch on updating and modifying the look of the Intranet, such as lists, libraries, fields, forms, report views etc.

**Office 365 and SharePoint Enhanced Functionality**

For your Intranet to be effective it needs to bring in data from other sources, notify users of activities, and allow end users to adjust or create new business processes, such as approvals. This section will go into how your Intranet solution will integrate with other software programs and applications. This section also will ask about how your Intranet solution will incorporate with Office 365 and augment the platform’s tools and utilities.

**Deployment and Service Options**

This section goes into the tools that come with the Intranet solution you choose. It asks about implementations and customizations to the Intranet solution, as well as the training and follow up after purchasing an Intranet Solution.

**Price and Total cost of Ownership**

This section goes into the costs associated with your Intranet solution and if it is in line with what you are receiving in return. Are you paying for a beautiful home page with custom graphics but getting little functionality? What is the five year cost and the impact of required ongoing consulting?

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| --- | --- | --- | --- | --- |
| **Intranet Solution Feature Comparison** | | | | |
|  |  |  |  |  |
| **FEATURE** | SP Intranet | Competitor 1 | Competitor2 | ***Notes*** |
| **Core Platform** |  |  |  |  |
| Built on Office 365 or SharePoint On-Premise  *Leverage powerful platform or standalone* | ✓ |  |  |  |
| No additional hardware or software required  *Do you have to buy anything else to run it?* | ✓ |  |  |  |
| Runs "native" as part of the Office 365 Ecosystem  *Runs on standard SharePoint rather than hiding it* | ✓ |  |  |  |
| Can leverage all Office 365 features  *Access features like Delve, Yammer, Skype and OneDrive* | ✓ |  |  |  |
| Uses SharePoint and Office 365 data integration features  *Connect external data sources using SharePoint* | ✓ |  |  |  |
| Can use Office 365 future updates and features  *As a native Office 365 solution will it benefit from new ones* | ✓ |  |  |  |
| Single sign-on for email, Office products, meetings, messaging, etc. | ✓ |  |  |  |
| Will not crash or be negatively impacted when Microsoft makes Office 365 changes | ✓ |  |  |  |
| Can access portals and applications from the Office 365 app launcher  *Core part of Office 365 navigation design* | ✓ |  |  |  |
| Uses standard Office 365 and SharePoint permissions | ✓ |  |  |  |
| Follows "No Code" solution design  *Does it require programmers or consultants to change it* | ✓ |  |  |  |
| 100% customizable without coding  *Can it change with your business? By Power Users?* | ✓ |  |  |  |
| Home page layout flexibility  *Can you pick your layout and change it?* | ✓ |  |  |  |
| Role based menu structure and forms  *Can users be presented with different navigation by role* | ✓ |  |  |  |
| Syncs with Microsoft Outlook (tasks, calendars, contacts, file explorer)  *Is it fully integrated with your office automation?* | ✓ |  |  |  |
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| **Intranet Structure**  *Is it just a home page or a structure on which to build* |  |  |  |  |
| Home Page | ✓ |  |  |  |
| **Employee Self-Service** | ✓ |  |  |  |
| *Central Help Desk* | ✓ |  |  |  |
| *Employee Directory* | ✓ |  |  |  |
| *Central Common Processes* | ✓ |  |  |  |
| *Central Approvals* | ✓ |  |  |  |
| *Purchase Requests* | ✓ |  |  |  |
| *Time Off Requests* | ✓ |  |  |  |
| *Time Sheets* | ✓ |  |  |  |
| *Time Off Calendar* | ✓ |  |  |  |
| *Expenses* | ✓ |  |  |  |
| *Rooms and Reservations* | ✓ |  |  |  |
| *Policies and Procedures Library* | ✓ |  |  |  |
| *Forms Library* | ✓ |  |  |  |
| Create new icon links to existing systems (ERP, Payroll) | ✓ |  |  |  |
| **Department Portals – Template**  Use for any department | ✓ |  |  |  |
| *Service Request Tracking* | ✓ |  |  |  |
| *Staff Portal* | ✓ |  |  |  |
| *Employee Portal - MyHR, MyIT etc.* | ✓ |  |  |  |
| *Department Document Libraries* | ✓ |  |  |  |
| *Task Tracking* | ✓ |  |  |  |
| *Staff Calendar* | ✓ |  |  |  |
| *Department Meetings Calendar* | ✓ |  |  |  |
| *Department Announcements* | ✓ |  |  |  |
| *Individual Staff Workspace* | ✓ |  |  |  |
| CEO or company blog site | ✓ |  |  |  |
| Community sites for groups | ✓ |  |  |  |
| Sub Intranet sites for divisions or locations | ✓ |  |  |  |
| Consistent site design and structure across departments | ✓ |  |  |  |
| Modular design allows phased deployment | ✓ |  |  |  |
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| **Intranet Branding** |  |  |  |  |
| Uses standard Office 365 branding  *Does it fit in with the rest of Office 365?* | ✓ |  |  |  |
| Follows Microsoft Guidelines and Rules (no changes to Master Pages)  *If not, you risk breaking it when Microsoft changes* | ✓ |  |  |  |
| Responsive design for tablets and smart phones | ✓ |  |  |  |
| Change colors, logo, layout, and background | ✓ |  |  |  |
| Choose from several out-of-the-box home page layouts | ✓ |  |  |  |
| Modify layout using standard SharePoint page edit  *Can you change the layout yourself?* | ✓ |  |  |  |
| Looks like other Microsoft products (MS Word, Excel, Outlook etc.)  *Is it intuitive for your user?* | ✓ |  |  |  |
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| **Content Management** |  |  |  |  |
| Pick and choose content and location to populate site | ✓ |  |  |  |
| Configurable Content Zones  *Home page zoned areas for content placement* | ✓ |  |  |  |
| Configurable Content Links  *Links to internal and external pages* | ✓ |  |  |  |
| Quick Links - in Navigation  *Permissions based content links* | ✓ |  |  |  |
| Easy to use Content Manager dashboard  *Add content without knowing SharePoint* | ✓ |  |  |  |
| Display content based on group or permissions  *Show specific content to groups* | ✓ |  |  |  |
| Active Content feature  *Capture news automatically from operations (new employee, new sales win)* | ✓ |  |  |  |
| Roll-up announcements from department portals  *Automatically display selected department news* | ✓ |  |  |  |
| Roll-up events from department portals  *Capture important events from departments* | ✓ |  |  |  |
| Content catalog for organization-wide content links  *Links you want to give everyone* | ✓ |  |  |  |
| MyContent - Personalized content for individual users  *Allow employees to pick their own content links* | ✓ |  |  |  |
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| **Available Content – out-of-the-box** |  |  |  |  |
| *Organization Announcements* | ✓ |  |  |  |
| *Organization Events* | ✓ |  |  |  |
| *Organization News* | ✓ |  |  |  |
| *CEO Message* | ✓ |  |  |  |
| *Company Forum and Discussions* | ✓ |  |  |  |
| *Company FAQ* | ✓ |  |  |  |
| *Company Alerts* | ✓ |  |  |  |
| *Message from the CEO* | ✓ |  |  |  |
| *Employee Birthdays* | ✓ |  |  |  |
| *Employee Recognition* | ✓ |  |  |  |
| *Industry News Feeds* | ✓ |  |  |  |
| *Social Network Updates - Twitter, LinkedIn, Facebook* | ✓ |  |  |  |
| *Local Weather Feed* | ✓ |  |  |  |
| *Stock Ticker* | ✓ |  |  |  |
| *Tip of the Day* | ✓ |  |  |  |
| *Surveys and Polls Feature* | ✓ |  |  |  |
| *Maps* | ✓ |  |  |  |
| *World Time Clock* | ✓ |  |  |  |
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| **Flexibility and Customization**  *Can it meet your specific needs and grow with you* |  |  |  |  |
| 100% customizable without code by business power users | ✓ |  |  |  |
| Change site page layouts | ✓ |  |  |  |
| Add or change content parts | ✓ |  |  |  |
| Add your own images and logos | ✓ |  |  |  |
| Change navigation and menus | ✓ |  |  |  |
| Add new portal sites anywhere in the structure | ✓ |  |  |  |
| Link your existing portal sites into the structure | ✓ |  |  |  |
| Inherit look and feel for new and in-house created sites | ✓ |  |  |  |
| Add or change data lists, such as new calendars, contacts, tasks etc. | ✓ |  |  |  |
| Add or change document libraries | ✓ |  |  |  |
| Add new data fields and columns | ✓ |  |  |  |
| Change or design forms as needed without code or SP Designer | ✓ |  |  |  |
| Add new report views as needed | ✓ |  |  |  |
| Change notification email alerts without workflow changes | ✓ |  |  |  |
| Change process workflows to meet your needs | ✓ |  |  |  |
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| **Office 365 and SharePoint Enhanced Functionality** |  |  |  |  |
| Included tool to capture data from web forms into SharePoint | ✓ |  |  |  |
| Included tool to migrate data from legacy systems into SharePoint | ✓ |  |  |  |
| Included tool to integrate data from back office or external systems into portals | ✓ |  |  |  |
| Included tool to manage SharePoint data (import, migrate, update, clean, backup) | ✓ |  |  |  |
| Create your own email notifications, reminders, follow-up | ✓ |  |  |  |
| Create your own business process workflows | ✓ |  |  |  |
| Allow users to submit Excel form data (expense forms, timesheets) | ✓ |  |  |  |
| Create Word or Excel documents from list data (quotes, proposals) | ✓ |  |  |  |
| Capture or create PDF form data from SharePoint | ✓ |  |  |  |
| Enhanced SharePoint forms utility to provide rich designed, rules driven forms | ✓ |  |  |  |
| Enhanced charting tools for creating vibrant dashboards | ✓ |  |  |  |
| Monitoring tools detect events to drive "Active Content" for Intranet portal | ✓ |  |  |  |
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| **Deployment and Service Options**  *What tools are included to go beyond standard O365* |  |  |  |  |
| Out-of-the-box with do it yourself customizations  *Can you do it yourself if you know SharePoint?* | ✓ |  |  |  |
| Control your own destiny - Mentored DIY  *Vendor implements, mentors and trains in-house personnel* | ✓ |  |  |  |
| Full-service implementation and customizations  *Vendor implements, customizes, and trains users* | ✓ |  |  |  |
| Business process design services  *Transform existing processes to new cloud processes* | ✓ |  |  |  |
| Full training available  *Product, O365, SharePoint training* | ✓ |  |  |  |
| Ongoing managed service options  *Ongoing monthly* | ✓ |  |  |  |
| Support and maintenance only option | ✓ |  |  |  |
| Guaranteed ongoing Office 365 support | ✓ |  |  |  |
| **Price and Total Cost of Ownership** |  |  |  |  |
| Pricing model requires per user subscription  *Pay every time you add a user?* | 🗶 |  |  |  |
| High subscription renewal rate every year | 🗶 |  |  |  |
| Price |  |  |  |  |
| 5 year Total Cost of Ownership |  |  |  |  |