



# Intranet Buyer's Guide: 10 steps to evaluate intranet software

# 10 Steps of evaluating intranet software

---

01

Determine the problem

06

Start discovery calls

02

Invite others to the party

07

Demo candidates

03

Fill in the gaps

08

Price & vendor comparison

04

Build a requirement list

09

Pitch to leadership

05

Research potentials

10

Presentations, proposal & procurement

# What's an intranet and why do i need one ?

## How do your employees start their workday?

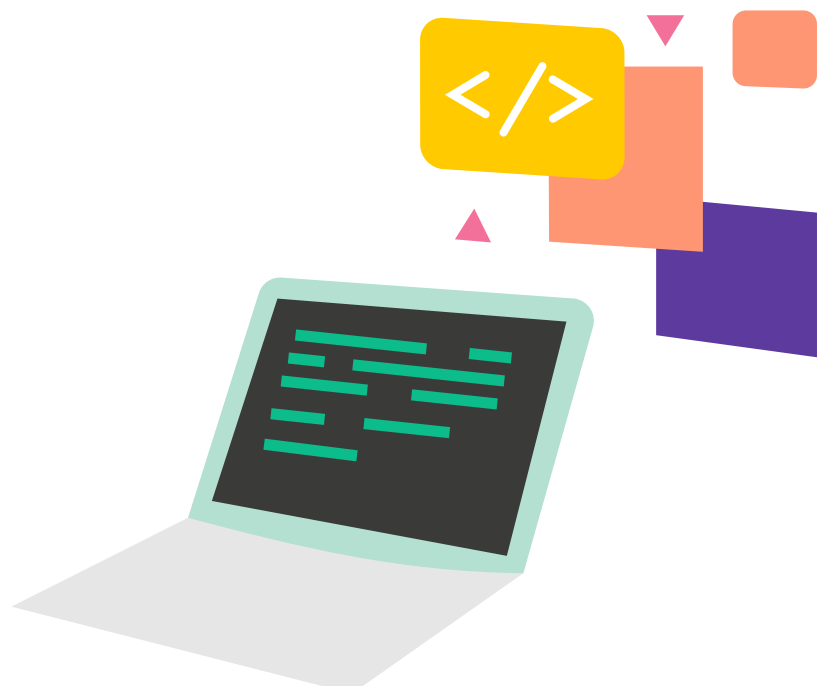
Maybe they check their email inbox. Maybe they go to Slack. Maybe they open up Salesforce, Asana, or bounce between a bunch of platforms before jumping into actual items on their to-do lists.

The modern workplace is driven by technology and the majority of employees start their day by using it. **So, the tools you invest in matter and set the tone for everyone on a daily basis.**

Just as important, today's employees use *a lot* of tools. In our quick example we listed 5 apps, and by today's standards, any employee would be lucky to have *just those* in their daily arsenal. [According to Gartner](#), the average worker uses 11 apps to complete their tasks!

Before finishing that first cup of coffee, employees are already discombobulated moving through platform to platform. Key information gets missed in the sea of platform overload and it becomes nearly impossible for organizations to manage who sees what, when, and where.

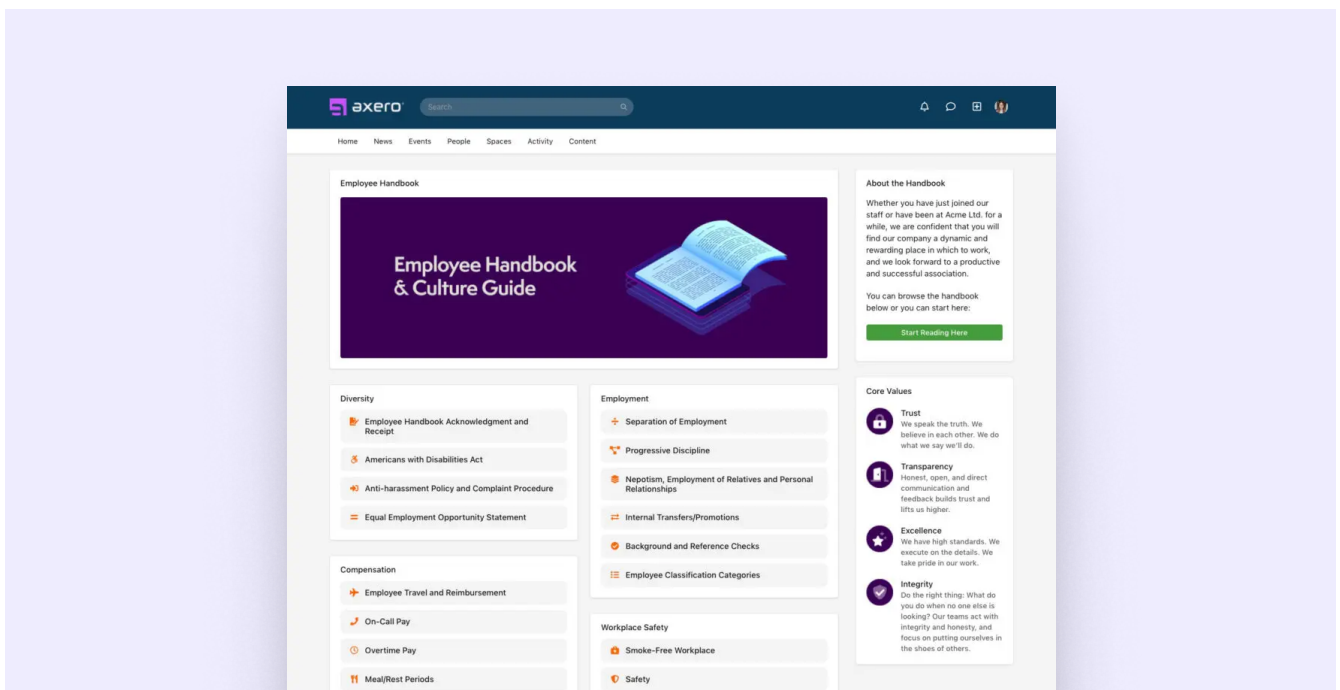
**This is where the intranet enters the chat!**



# What's an intranet, exactly?

**Intranet software**, also called a digital workplace and employee experience platform, is one digital hub workplaces use to streamline communication, centralize and share information, and drive culture company-wide.

Intranets solve common challenges by **centralizing the tools employees need**, while making the workplace more productive and boosting engagement with staff, stakeholders, and even customers.



Over the years, intranets have become increasingly essential because workplaces are drastically different than they were even a couple of years ago. Today, employees are remote, have hybrid setups, or work in large companies with scattered locations. Pair that with mountains of organizational data to manage, and you have yourself the perfect example of why intranets exist.

# The benefits of a modern intranet.

More than ever, workplaces need a secure piece of technology that unites their people, connects them with information, and builds a community so employees are engaged and feel part of a mission. Every workplace is different and because of that, there's a lot that you can do. Here's some real life examples!

## Improve customer support and customer experience

Have a large support team or franchises? An intranet connects your reps to frequently asked questions, product information, or menu updates on any device. Employees can support customers because they, themselves, are supported.

## Simplify employee onboarding

The onboarding process directly impacts how long people stick around (33% of respondents to [this survey](#) quit their job within the first 90 days 😞). An intranet streamlines the entire process so new hires are equipped with exactly what they need.

## Support remote teams securely

There's no way to successfully have remote teams if they don't have a secure piece of technology that connects them with information and builds a community so employees are engaged and feel part of a mission.

## Streamline communication and company goals

An intranet clears out the clutter and delivers tailored information to every user. From leadership to employees, employees to leaders, and employees with each other, everyone has an easy place to receive and engage with comms.

## Accelerate knowledge sharing & finding

Everyday your workplace is accumulating more information, more projects, more documents. By bringing it together in one place, modern intranets organize and segment that information so that the right person can find the right data.

## Amplify company culture

Company culture brings everyone together and inspires your employees to work with a purpose. With an intranet, you can give your culture a digital identity and recognize the achievements, value, and wins of your people.

### How this guide will help you ?

The sky is blue and evaluating intranets can be...overwhelming. With so many options to consider, factors to think about, and questions to ask, this guide will set you up for success! In the end, you'll have a thorough understanding of what the intranet buying process entails so you can land on the right solution. Let's get started! 😊

## Step 1

# What's your problem ?



Before you look at solutions, you need to understand why you're doing it in the first place. Identifying your problems and the gaps you want to fill will guide your entire process and get your leaders on board because you'll be able to present the need and value for this investment.



Get input from teams across the company. We also recommend sending out a survey to gather as much feedback as you can—every department has unique perspectives of what's working, what could improve, and what's missing. (But not to worry if you're not ready for an employee survey, there's a couple more opportunities in steps 3 and 4.)

**To help you get started, here's common problems organizations solve with an intranet on the next page!**

# Common problems organizations solve with an intranet.

## Poor communication

**74% of employees** feel they're missing out on company information.

Communication is the number one complaint from employees. Often, workplaces struggle with adding visibility and transparency to communications between leadership, managers, and teams.

## Disengaged employees

An actively disengaged employee cost their org. **\$3,400 per \$10k salary.**

There's many culprits behind employee turnover, but a lot of the time, disengagement is part of the problem. If people aren't present in their work and who they work with, why be present at all?

## Lack of support for hybrid workplaces

**87% employees** will say yes to flexibility with workplace options.

It's not just about productivity and having the right project management tools. Workplaces need software that overcomes distance and prompts team interactions like everyone's in the same room.

## Company culture is lagging

Workplaces with strong culture saw a **4x increase** in growth revenue.

Leaders are responding to a shift in employee behaviour: a people-centric culture is a huge motivator for employees productivity. This falls back on your culture—how you integrate your values into everyone's day.

## Scattered information

**83% of respondents** say that they have problems accessing the data they need to do their jobs.

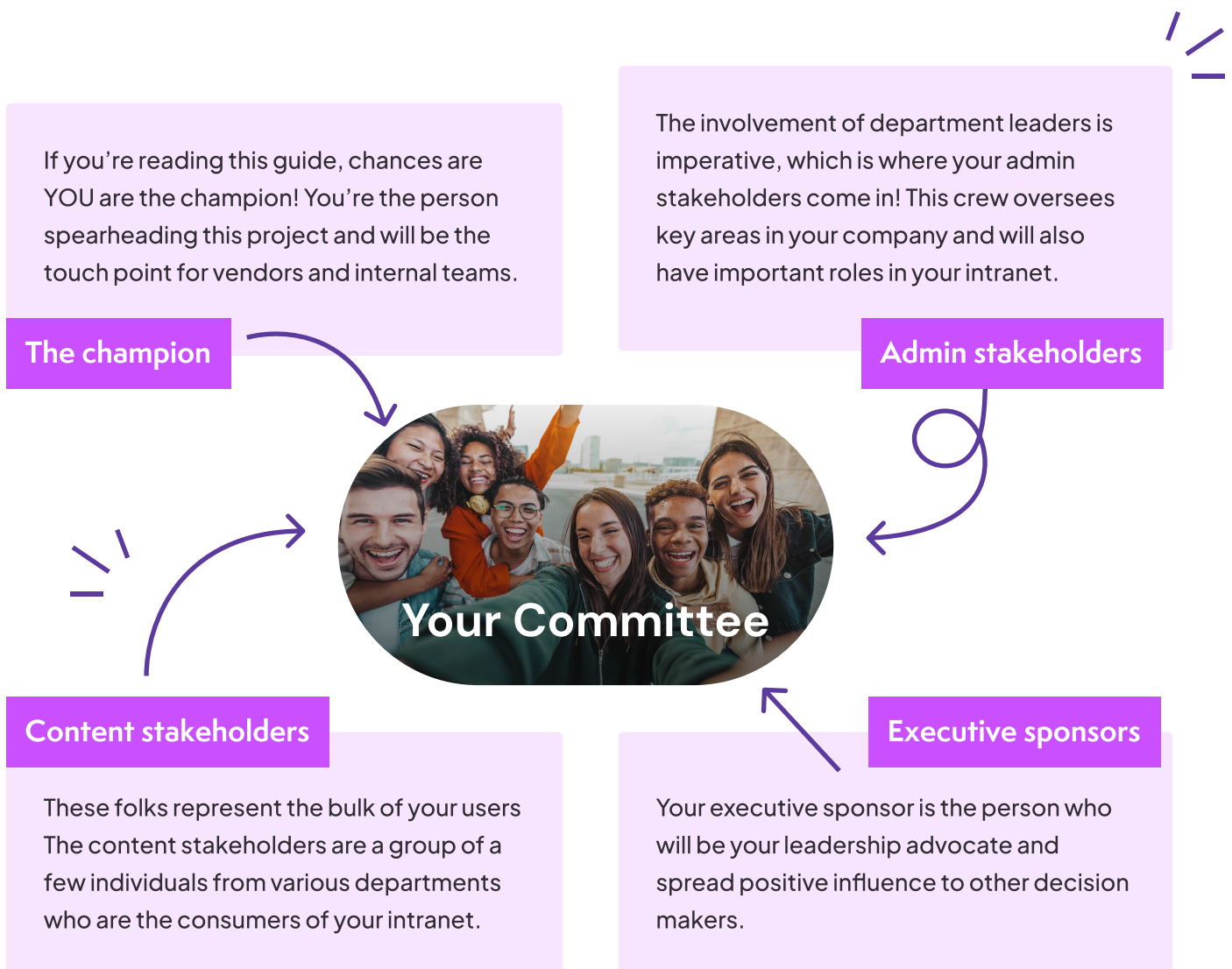
A lot of companies struggle with managing their information and finding the best way to segment it all, so people can actually find and receive important information.



## Step 2

# Invite others to the party

Once you figure out your key problems, it's time to build a committee! This will involve influential players in your organization, usually directors from each department, who have unique insight into how their teams work today and what they need to work stronger in the future. The majority of these people will also play an ongoing managerial role in the use of your new intranet—so their involvement is imperative.



## Have a smaller team ?

We know you're a jack of all trades! You'll take this project over the finish line working alongside an Executive Sponsor to get sign off on your new intranet.



## Step 3

# Fill in the gaps

You understand, at least at a high level, why you need an intranet. But how do you envision your intranet to solve those needs? This is where your trusty intranet committee comes in handy. Have a brainstorming session to dig deeper into what challenges your workplace faces today. Here's a few examples of gaps you may discover as a team.

### It's the wild, wild west for onboarding

Your admin stakeholders agree: new hires need a special hub for policies, manuals, and FAQ pages. After some discussion, Sarah from the comms team has an idea. Video tutorials with mini quizzes would also really help!

### Leadership wants to offer hybrid workdays

There's been a lot of talk about adding optional work-from-home days but leadership is worried about losing that connection and productivity that people get when they're together. Can we find a platform that has a recognition program to keep momentum high?

### System overload

It's a known fact that your workplace uses too many tools. No one knows where to find specific files, some information is in a legacy platform that the average user can't access, causing numerous people to get looped into a Nancy Drew investigation. Can we tie all that scattered information into one federated search?



Employee feedback doesn't always align with leadership's. Send out a company-wide survey!

### Cluttered with outdated content

Today there's a lot of documents across the company and no one can keep up with maintaining it. It's discovered that you need expiration dates for the legal team and approval workflows for all managers.

### Our in-house intranet is more trouble than it's worth

You've been using an in-house intranet that's nearly impossible to use effectively. It's static, only the IT can upload new content, & the user experience feels like it's 1998. Can we give IT well deserved relief & turn to an expert to get situated with an intranet that works how we want it to?



## Step 4

# Build a requirement list

In a perfect world, you wave a magic wand and the intranet of your dreams appears. While we want that for you (really, we do!), there's many elements that go into your decision making, including budget, implementation timeline, and ease of use, which is why it's important to understand what you need versus what you want.

Create a list of what you have today, what you wish you had, and what specific gaps currently exist. We recommend dividing your list into a couple categories: must-have, integrations, security, and want. The must-haves are the tools you need to accomplish your goals established in Step 3. Here's an example of what your list might look like:

### Must- Haves

- Federated Search
- Document storage
- Company directory
- Org chart
- Wikis/knowledge mgt.
- Video library
- Mandatory reading
- File exporting capabilities
- Email automation
- Tasks/project mgt.
- Permissions
- Mobile app
- Custom branding
- Push alerts
- Language translation
- Engagement analytics
- Personalized newsfeed
- Launchpad

### Integrations

- Active Directory SSO
- SharePoint
- Outlook Calendar

### Security

- HIPAA Compliance
- On-prem hosting
- GDPR compliant
- SOC 2 compliant

### Nice to have

- Integration with HR system
- Polls/Surveys
- Idea management
- Content expiration dates
- Tagging
- Social media integration

## Step 5

# Research potentials

You have your team, you understand your pain points, and you have a requirements list. Now it's time to see what's out there! Because there's so many platforms who promise similar benefits, this is where it can feel overwhelming.

Take a deep breath. We outlined for you a plan to navigate vendors and create a strong list of candidates.

12 best intranets [↗](#)

## Read reviews

*"Axero is incredibly easy to use and the Axero team is SUPER helpful on all ends. I feel so supported by the software AND the team."*

-Liz K., Content & Business Process Manager

Go to trusted sources who are experts and collect reviews from real-life users who have the best insight. Sites like Capterra, G2, and Source Forge gather feedback from users about what they like, but just as importantly, what they don't like about their software.

## Vendor history

Are they established in the market? The About Us section on a site can be very telling. Vendors who have been around for over a decade come with fine-tuned knowledge and processes.

## Case studies

Take a deeper dive into the journey of a current user. From the selection process to interactions with the sales team and post launch, have they successfully solved challenges like yours?

## Check out ratings

  4.5

The rating score and number of reviews will show you how people feel about the features, support experience, and platform.

## Awards

Have they won any accolades? If customers are happy with their product, it'll show in awards and badges.

## Explore vendor websites

Explore what features they promote and meet their brand. Do they seem like someone you would want to work with? Do you see any of the items on your requirements list being discussed?

## Download industry reports

Read reports from market experts, such as Gartner, Forrester & Software reviews. These guides are great resources to find vendors & deepen your knowledge about the intranet landscape and current trends.

## As you research, make a list of who stands out.

Create a list of 5–10 vendors to schedule initial calls. These platforms appear to check off the boxes on your must-have list. But don't worry—you'll dive deeper into the platforms during the discovery and demo calls (and we'll make sure you're prepped and ready to go!). Here's what to expect next:

### Step 1

#### Discovery call

A chance to ask preliminary questions and for the vendor to learn about you. Based on what you share, they'll prepare a demo to showcase how you'd use their intranet.

### Step 2

#### Demo call

See what's possible! The sales rep will walk you through their platform and highlight capabilities on your must-have list.

### Step 3

#### Strategy session

You might need a follow-up demo call to dive deeper into functionality or invite other stakeholders who weren't on other calls.

### Step 4

#### Procurement

Get into the fine print, review contracts & get budget approval.

### Step 5

#### Sign

Secure your new intranet!

### Pro Tip

If you've never been part of the buying process, now is an excellent time to check in with the right people and get an understanding of how the approval process works. Will you need to pass off paperwork to security, legal, or internal procurement teams? This will keep your timeline on track.

## Step 6

# The dos and don'ts of discovery

You've already met with teams, researched vendors, made lists, made newer lists, and did we mention meet with teams? You're probably ready to jump into demos and see what the platforms can do. Before we get there, it's time for the discovery call! Discovery calls are one of the most important steps and they're all about you!

The purpose is twofold: the discovery call is a chance for the vendor to learn about your goals so they can set up a demo site for your specific needs. For you, this is an opportunity to ask deal breaker questions before you invest more time in the vendor.

## Dos and Don'ts

---

**Do** if possible, have your key admin stakeholders on the call—especially from the IT team! When it comes to security, implementation, & integrations, having an expert from your team run through the basics will help make selections for who you want to demo.

**Don't** push for a demo before the discovery phase. There's no way to see an effective demo before discussing your specifics.

**Do** submit your RFP if this is part of your internal process.

**Don't** cancel out a vendor if the price doesn't fit your budget within reason, of course. Intranet vendors want to partner with you and a strong sales team will try to be flexible.

**Do** ask preliminary questions. If, let's say, the vendor doesn't have a built-in SharePoint integration, which is mandatory for you, hooray! You saved yourself time down the road by getting that information now.

**Don't** involve your executive sponsor yet. You want to make sure your executive sponsor forms opinions about solid candidates only.

## Speaking of questions, if you don't already have a list, consider asking these on your calls:

### What does the buying process look like ?

Most vendors follow a similar process, but it's always a good idea to confirm so you can keep your timelines in check.

### How much time does it take to implement ?

Some platforms take a few weeks and others can take months depending on your user count, internal requirements, and use case.

### How does implementation work?

Adding a new software can be a massive undertaking, especially when it involves all of your documents and workers. Learn what the vendor's process looks like, what training services exist, and if there's additional costs.

### How is the software deployed ?

Are they SaaS based or also on-premise? Depending on your infrastructure needs, this is an imperative question.

### How is the mobile app deployed ?

If you need a mobile app, ask how users access the app, how it's managed, and what's possible for branding, customization, and functionality.

### Can we use our existing single sign-on?

SSO is a HUGE priority for most organizations. Does the vendor support your current system?

### Does your platform integrate with our systems?

You can consolidate a lot of tools but there will always be some legacy platforms that you can't part with, such as SharePoint, calendar systems, and email providers.

### Can we add our own functionality/integrations?

If the vendor doesn't have a built-out integration, find out if you can embed third party sites into the platform. Some providers have REST APIs, widgets, and custom tools to support this.

### How customizable is the layout and design?

If branding is a priority, ask how it works. Is it easy to change colors, labels, and page templates? Do you need to purchase an additional package or can your internal team manage it?

### What's the cost ?

The \$1 million question (hopefully not literally 😊). Get a price estimate so you can gauge what's realistic.

As you power through discovery calls, start refining your list to 3-5 vendors who check off your initial boxes! These are the solutions you'll book demo calls with to see their platform in action.

## Step 7

# All about your demo

Now's the fun part—time to see what these vendors can do! Gather your admin stakeholders for your first round of demos. Be sure to ask for a recording of each demo so you can show your decision makers when you have a final list. Not to worry, though—we'll talk more about this in Step 9.

**As you conduct demos, here's key intranet features you'll want to see:**

### User Experience

For an intranet in particular, an easy-to-use interface will make or break the overall success, adoption, and value of your digital workplace. A lot of people will be using the intranet so keep an eye out for a clean platform with an easy and familiar navigation layout.

### Workspaces

You'll likely be using the intranet to give departments, teams, and projects dedicated hubs to centralize relevant documents and people. See in real-time how people get there and what customization options exist for individual spaces.

### The homepage

First impressions are everything and in most cases, the homepage will be the first thing your users see. Are there different layout options and can you create unique experiences for different users when they log in?

### Admin Experience

Intranets have different role options, so admins and moderators have even more tools than the average member. See what this looks like for admins and how key managerial tools work.

### Content options

Depending on your goals, take a tour of the content tools and what the creation and publishing experience is like. The ability to include tables, embed videos, create templates, and add images and colors is what will take your information to the next level.

### Search function

The search bar is a fundamental component for every intranet because at its core, a digital workplace needs to connect people to someone or something. Make sure the experience is intuitive and comprehensive—you may need a search to surface content in third party systems.

### People directory and the org chart

Where do people go to find a colleague and what do individual profiles look like? A great intranet will go beyond stiff charts with custom fields, engaging templates, and an easy way for people to network.





## Collaboration tools

Particularly for large workforces and remote teams, the ability to collaborate is how projects get completed efficiently and successfully. Your intranet should have collaboration tools, such as tickets, cases, and integrations with Google Workspace or Microsoft 365 so users from any location can work together.

## Analytics and engagement metrics

Most intranets offer an array of analytics, from member usage to content statistics and search reports. This information can be powerful to track the effectiveness of your platform and content.

## Support experience

A vendor doesn't just sell you intranet software, they create a lasting partnership. Find out what continual support services each intranet vendor offers and if there's additional costs. This includes problem resolution but can also cover feature ideas from customers and periodic training services.

## Customization abilities

The ability to customize your intranet is how you make an out-of-the-box site your own to increase engagement and connect users to the company culture. Can you drag and drop widgets? What elements can you adjust? How deep does customization go?

## Recognition and engagement tools

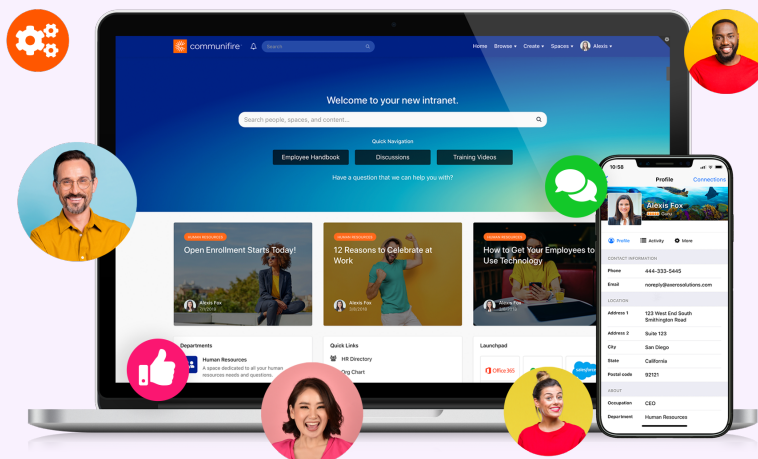
Here's where employee engagement and intranets collide. Aside from social tools such as likes and comments, does your vendor have built-in recognition features?

## Files and document management

Most companies have a lot of files—and yours is likely no different. See how files are organized and what options are available for permissions. Can you make content viewable to certain users? Can you flag, tag, and set expiration dates?

Here's a quick and easy way to add Axero to your vendor list!

Book a Call ↗



## Let's get deep

You've already asked basic questions during the discovery call, but the demo is the perfect place to get into the nitty gritty—especially when your entire committee is there. To make sure you cover your bases, here's some of our recommended points to cover:

### **1. Can you easily customize the platform and are there specific adjustments that only the vendor can do?**

You may have touched on customization already, but now's the time to understand what's possible and what is not. Some vendors appear to be easily customizable when in actuality performing a simple action like changing banner colors and logos has to be done by their support team.

### **2. How segmented can you get with communications?**

Most organizations use intranets to streamline communication and knowledge sharing. Think about specific scenarios your teams may find themselves in. How do managers send communications out to different teams? Can admins create custom lists of employees to send targeted announcements?

### **3. What integrations are available and how in depth are they?**

Hearing a “yes” to integrations on your list is a promising sign, but that's not enough. You need to understand what the integration entails and how deep it goes. There's nothing worse than thinking you have an integration only to find out it doesn't support your actual need.

### **4. How does the mobile app compare to the desktop experience?**

For many workplaces, an accompanying mobile app is a must for frontline workers that need access to communications and internal knowledge. Oftentimes, the mobile app does not have the tools you'd expect. Customization, for instance, can be limited, and mobile intranets tend to lack key features on the desktop version.

### **5. What's the hosting environment?**

Does the vendor use a single-tenant or a multi-tenant host & is this amenable to your security requirements?



## Step 8

# Compare your vendors & set your price

At this point, you may have eliminated some vendors during the demos, but now it's time to narrow down your list to ideally 3 contenders if you're not there already. Meet with your committee to review your checklist and do a side by side with potential candidates. Be sure to find a balance between budget versus functionality—if you're spending any amount of money, you want it to be for the right solution.

## Things to know about the price.



Not every intranet is built the same and the same goes for the price.

You likely have a loose budget for the project, but it's important to understand general ranges and pricing structures for different software. Some vendors have packages based on user count and features, while others have one fixed price. Some offer one year contracts, while others have three years. Payment schedules and the amounts in those periods may vary, too. **Here's what you need to know:**

### On-premise vs SaaS

You have two hosting options for an intranet: on-premise and SaaS. Many organizations go with SaaS, Software as a Service, because it's cloud-based—so ongoing maintenance, feature updates, and fixes are all taken care of by the vendor. It's also the cost-efficient option typically paid monthly or annually. For on-premise, your intranet is hosted on your own server. This option gives you more control and security over your intranet but requires higher upfront costs for set up and continual site management.

### Advanced features

Some vendors offer different price packages based on features. REST APIs, integrations, and white label mobile apps, for instance, may be in a more expensive subscription.

## Implementation options

Implementing your intranet is imperative because you need your platform to be set up correctly for every person to use it successfully. That's why vendors usually offer different deployment experiences depending on the scope of the organization.

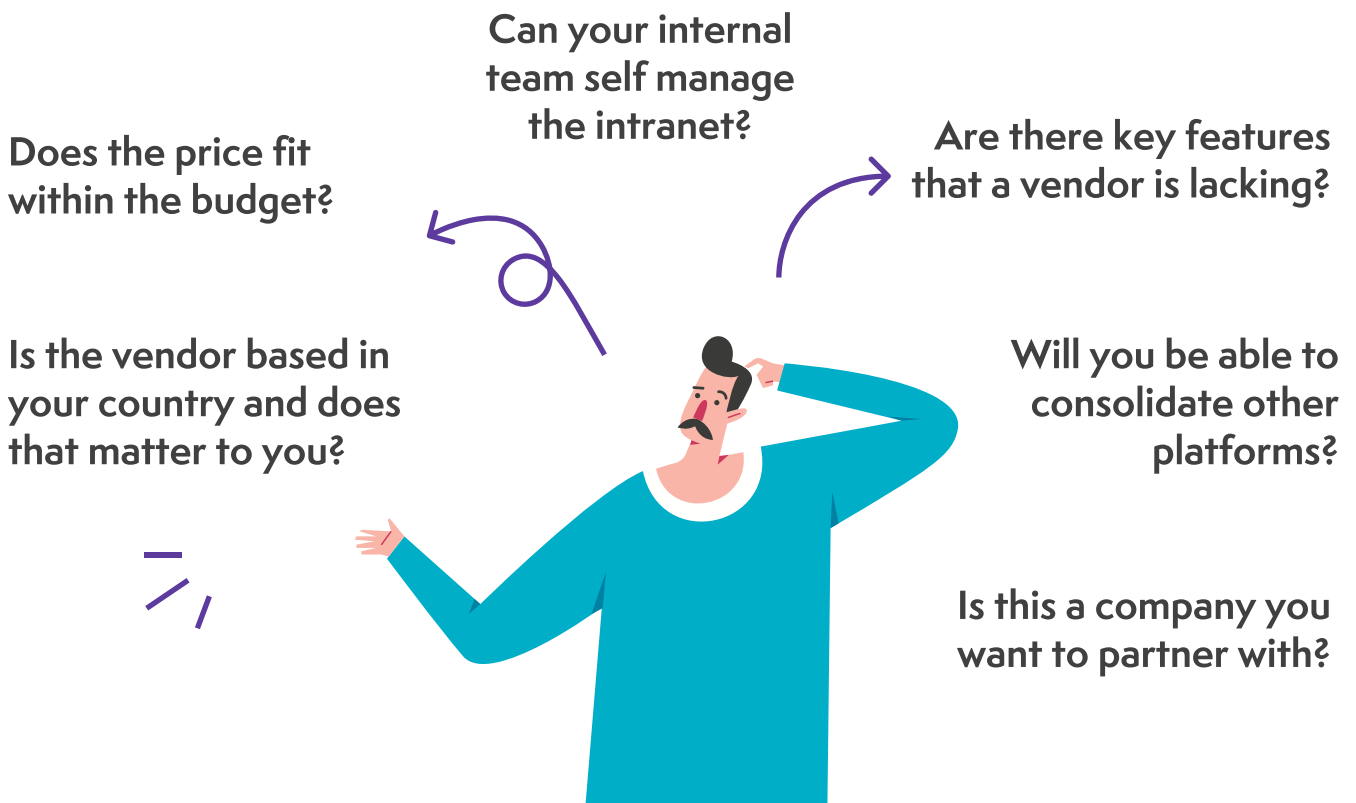
## Ongoing support services

You may notice different support options as well. Depending on what kind of service you want—a dedicated success rep, guaranteed response times, or a purely self-service experience with online tutorials and videos—these support plans will influence your overall investment.

## User count

Before incorporating add-on services, some vendors break down their pricing structures based on the user count. There may be different packages for small businesses, mid-size, and enterprise organizations. It's important to land on an option that's scalable with your workplace. Typically, the price per user for larger organizations will be lower than other subscriptions.

Still working through your finalists? Here's determining questions



## Step 9

# Pitch to leadership

Sometimes the biggest hurdle is getting leadership on board. Now that you have a list of committee-approved finalists, here enters the powerful role of your executive sponsor! Because the executive sponsor is the player on your committee who can sway other decision makers, you'll want them to understand the need for a new intranet & believe in the carefully selected platform(s).

Give a presentation of the top 3 intranets and highlight the value and cons of each. You can also use recordings of each demo to give a tour.

Depending on your organizations' processes, you may also need to present to a leadership board. You'll want to be prepared to make a thoughtful pitch that demonstrates the value of your top choice and helps them see beyond the price tag. Here's some best practices, which you can also use for your executive sponsor:

### Lead with the need

The only way to get your leaders to buy into an intranet is to have them buy into the need. Focus on what's hurting business results and how it can be solved with a new digital workplace. For instance, it's far less effective to say, "the search on our current intranet is annoying to use." Reframe this to highlight the ROI. "It's taking our support team 10 minutes to find the right resources for customer tickets. With X intranet we can cut that time in half and tackle more tickets in a day."

### Point to a ROI

Most CEOs want to know that investing in something or someone new will generate more revenue or value for the organization. They want numbers and evidence. Use this [intranet ROI calculator](#) to measure the business impact of a new digital workplace.

### Highlight what you can consolidate and eliminate

Are there applications your workplace can replace? If you currently use a ticketing system, for instance, your new intranet can replace that tool while streamlining communications, company wide. Get an idea of potential costs that could be saved—this is compelling information for executives.

## Best practices, which you can use for your executive sponsor:

### Make sure the timing is right

We've found that timing can be one of the biggest derailers for an intranet project. Before meeting with leadership, check in with your procurement team. Are there overlapping systems being implemented? Is there a timeline for budgets tied to this fiscal year versus next year? Is everyone who needs to sign a document available? We've seen too many projects delayed because Tim from legal was away on vacation!

### Prepare to defend buying

"Why buy when we can build?" It's the eternal question that many executives love to ask. Be prepared with a rebuttal. The amount of internal resources and budget that's required to build a fully functional intranet, let alone continued maintenance, can be astronomical. That's why leaning on a vendor for upkeep and upgrades are a huge driver. You can even share [this case study](#) about the cautionary tales of building.

#### QUICK RESOURCES

- [Intranet ROI Calculator](#)
- [Numbers and stats about intranets](#)
- [Value points about knowledge management systems](#)
- [Tips for persuasion](#)



## Step 10

# Presentations, proposal & procurement

You're almost in the final stretch. You presented final options to your leadership team and either got approval to make the final selection or your board picked the vendor!

**GOOD JOB!**

Before you can officially run across the finish line, make sure you've completed every other step in your internal buying process before passing the contract off for final signatures. You want to eliminate any barrier that could prolong getting a signed contract.

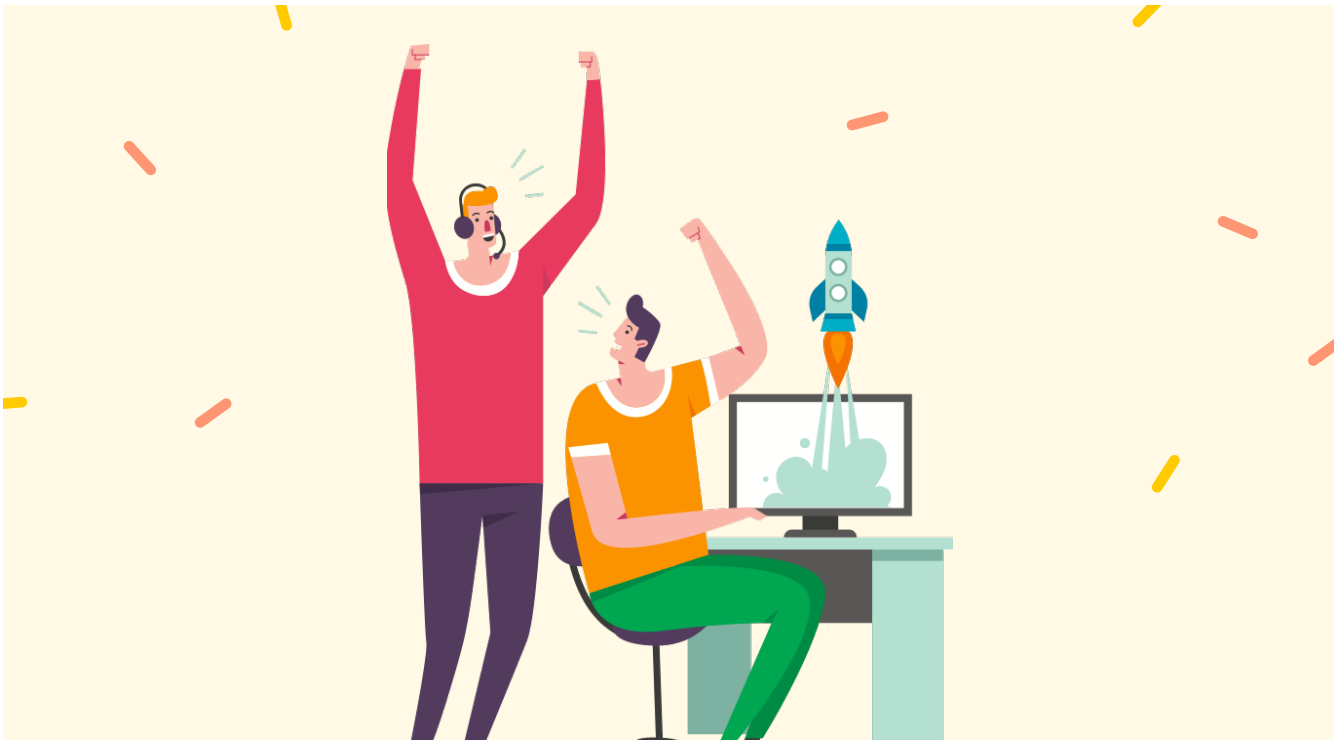
Are there final security, legal, or internal procurement procedures?  
If so, cross those t's and dot the i's.

Once you've taken care of lingering requirements, all that's left is **signing the contract...**



## CONGRATULATIONS!

You successfully lead an entire intranet project, which as you know is no small feat! All of the time, energy, meetings, and emails were worth it—and your entire workforce will soon experience the benefits.







# Curious about Axero ?

Not to toot our own horn, but Axero is the leading intranet software that unifies teams and accelerates growth. Hundreds of organizations worldwide trust us to support their internal communications, collaboration, and document management to boost productivity and build a culture that employees love ❤️.

We're also pretty great to work with ([see here!](#)) Find time below to see what's possible.

Hi, I'm Amy! Whenever you're ready to see Axero in action, I'm here as your guide. To learn more about our platform and how Axero can work as your new company intranet, you can always find time below.

➤ Let's Chat!

