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# How To Sell MOSS To Your Boss

## Building the Business Case for MOSS

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“Many consider 2009 to be all about cost reduction, with IT investments being relegated.”

### INTRODUCTION

Looking to introduce a new information management system to your company, with your sights firmly set on the Microsoft Office SharePoint Server (MOSS) platform?

We all know it's a tough year to be proposing new technology projects to business leaders. Many consider 2009 to be all about cost reduction, with IT investments being relegated. This article provides valuable insights into crafting a compelling business case to introduce MOSS to your organisation.

In short: how to sell MOSS to your boss.





## ARTICLE

Take a deep breath. You're about to step into the boardroom and present a business case for a new MOSS-based information management system to your organisation's CEO and executive team. One of your colleagues has just left the room, shoulders drooping, having had his proposal for a so-called 'discretionary' project knocked back. Maybe 2009 is just not the year for you, the company's IT Director, to pitch a project around information sharing, communication, and collaboration? Time to take centre stage and find out...



“The challenges we face in the current economic climate are changing the way businesses make decisions on their technology spend.”

The challenges we face in the current economic climate are changing the way businesses make decisions on their technology spend. While many organisations have responded by shrinking IT teams or delaying projects, forward-thinking CEOs are looking to do much more than just reduce their cost base. They are identifying new ways to assist the business to deliver on strategy effectively: grow market share, improve customer intimacy, protect margins, reduce risk, innovate and much more. In fact, doing this in today's economic climate provides an opportunity to create even greater differentiation and competitive advantage.

So how do you capture the attention of your executive team with your aspirations for a new MOSS system within your organization? What is the key to getting them as excited as you are about what MOSS can deliver? A killer MOSS business case is the lynch pin. Let's talk about tightening that business case and loosening your executives' purse strings.



“Work on your understanding of the business environment, the drivers and the strategic imperatives.”

### **ALIGN YOUR PROJECT GOALS WITH BUSINESS STRATEGY**

Easy right? Not always.

Sometimes the business strategy is not filtered down, is lost in translation, is not in good shape to start with, or worse still, doesn't exist at all. Seek it out. Work on your understanding of the business environment, the drivers and the strategic imperatives. Engage with the business leaders and decision makers. Be sure to craft your MOSS business case and presentations in their language.

### YOU CAN'T BUY A KILLER BUSINESS CASE OFF-THE-SHELF

Build your killer case around hitting the hot buttons for your organization: your strategy, your maturity level in information management and your culture. The one-size-fits-all benefits list from the Microsoft website just won't cut it. Sure, there will be common threads across most organisations' strategic plans: driving costs out of the business, improving customer retention rates, increasing customer service. And did I say driving costs out of the business? For clear linkage of project outcomes with business objectives, offer more than 'better document management increases the bid team's productivity'. Be sure to answer the so what? 'This means the bid team can spend less time searching for documents and more time improving the quality of the bid, and ultimately, impacting our win rate'.

“Be sure to answer the so what?”

If your organisation has elements of an information management system already, focus on how MOSS complements it, addresses remaining gaps, or why it's time to move on from legacy systems. Can the move from a legacy system allow for a rationalisation of hardware, application portfolio and support costs, by allowing content to be managed effectively within a single infrastructure? Or is there already some subterfuge that the CIO needs to rein in, such as instances of Windows SharePoint Services springing up around divisions. 'If we don't respond to demand and introduce a structured, secure MOSS foundation, think of the risk to our business.'





“Consider the efficiency gain if every user has an extra fifteen minutes every week that would have otherwise been spent searching for a form, policy, process or colleague’s details.”

### OTHER ANGLES TO CONSIDER

- MOSS can be used to create a sensational intranet. Business users can be trained to create great looking web pages, with document libraries providing easy access to corporate policies, processes and forms. No bottlenecks. No specialist skills required. Help your people to connect with each other using personal sites to create a corporate directory, featuring contact details, pictures, skills and current projects. Consider the efficiency gain if every user has an extra fifteen minutes every week that would have otherwise been spent searching for a form, policy, process or colleague’s details. An engaging, well structured intranet can also contribute to breaking down silos and building a sense of community across your organisation.

- There’s often enormous headroom for efficiencies with organisations through further automation of business processes. Sometimes a small change, such as a new online approval process for a frequently-used form, can have a big impact when calculating time savings over a year. Leverage MOSS’s onboard workflows for review and approval, or create custom workflows to collect and validate data that drives your business processes.

- Give your business teams a repository for project documents, and web-based tools to manage tasks lists, issues, risks and reporting via a team site. With the gentlest of learning curves, they can coordinate their activities more effectively.

And yes, it’s extremely difficult to tabulate the return on investment figures for projects of this nature. Do be prepared to substantiate any dollar savings you put forward.



## RECORDS MANAGEMENT AND RISK

Long before the global financial crisis hit our shores, company boards and executives had become sensitised to risk management and their increasingly stringent legal and regulatory obligations. To meet these requirements, companies need to manage more complete and accurate records of business information, sparking renewed interest in records management solutions. The out-of-the-box MOSS records management capability is basic. But partner solutions are available that significantly enhance this basic functionality to provide records management at a level compliant with Australian standards and regulations.

Some solutions keep the records management action behind the scenes, so users don't need to understand the specifics around what constitutes a record and how to get it logged in the system. This is arguably the biggest barrier to success in records management implementations. Secure the comfort of your executives by offering a solution that facilitates compliance without a daunting change management challenge. You will also be helping your legal team quickly retrieve that crucial contract document, or your customer service team locate a vital piece of customer correspondence, right when they need it.

If the records management necessity hasn't surfaced from the business as yet, it's just a matter of time. Consider relevant legislation and assess the business requirements for records management in this context. Appropriate risk management and legal compliance will add weight to your MOSS business case.

“Secure the comfort of your executives by offering a solution that facilitates compliance without a daunting change management challenge.”



“For the cynics on your decision panel, who question why...”

### **A COMPELLING USER EXPERIENCE**

These days web-savvy users have much loftier expectations of the user interface for business applications. Information management systems can live or die by their ease of use. You’ve heard Microsoft milk this one: MOSS has unparalleled integration with desktop productivity applications like Office. For the cynics on your decision panel, who question why MOSS will get higher adoption levels than the current system, demonstrate the comfortingly familiar user interface. Remind them that there’s often no need to step out of MS Word or Outlook to execute many tasks.

“Don’t overlook the power of conducting your own market research...”

### **WILL YOUR CUSTOMERS BENEFIT TOO?**

#### **WHAT ARE YOUR COMPETITORS DOING?**

Recognise which aspects of the information management system provide your organization with real competitive advantage. Need to build customer intimacy? Need to deepen their connection to your brand, not your competitors’? Can improved collaboration be part of your response? A client extranet could be a valuable tactic within your customer relationship strategy. Don’t overlook the power of conducting your own market research with your customers on this. Would they appreciate a more effective way for you to share information with them? Ask them.

Appeal to your executives’ competitive streak. Paint a future vision where your executives have made smart decisions on technology enablers that propelled your company right to the lead in the information management game.



### HARNESS THE POWER OF STORY TELLING

There are plenty of success stories for MOSS around. Uncover a story that best matches your industry, your business, and your objectives. Provide a real-world example of another company's investment and returns. Seek out those powerful anecdotes about fast adoption and benefits in organizations with a similar level of readiness.

One of my favourites: Transfield Services, a leading operations and maintenance service provider, implemented MOSS in 2007. In the ensuing twelve months, the system has been rolled out to its operations around the world. Among key objectives for the project was a desire to provide a better connection between experts working in different sites, industries and regions, and to promote knowledge sharing. Within weeks of deployment, colleagues working in similar disciplines had created team sites to share tools, resources and innovations. Clients and partners can be invited into team sites to participate. Among other benefits, it has helped position Transfield Services as trusted advisor to clients on their industry's best practice. The system got (and still gets) a big tick from the board, executive team, and from over 5,000 happy, empowered users.

“Provide a real-world example of another company's investment and returns.”





“...allow solutions to be developed from experts across the company...”

**ACKNOWLEDGE BUSINESS TRENDS:**

**ENTERPRISE 2.0 IS NO LONGER JUST COOL FOR CIOs**

We’ve watched on as web 2.0 has begun to pervade organizations. Companies have noted the intense consumer engagement and creativity surrounding these technologies, and recognise that harnessing web 2.0 internally (aka enterprise 2.0) can be similarly used engage a broad base of workers. The resultant mass participation and internal social networks can create rich content, allow solutions to be developed from experts across the company, and promote generation of ideas.

Consider the role of enterprise 2.0 within your information management strategy, and how MOSS’s on-board tools, like wikis, can facilitate innovation and value creation.

“Shed light on the opportunity cost.”

**ARTICULATE THE OPPORTUNITY COST**

What if your MOSS business case is broadly supported, but won’t make the top 3 must-do projects for FY09/10? Clarify the productivity losses, compliance risks, and other pain to bear by holding off another year. Shed light on the opportunity cost. It will be hard for your executives to swallow.



### KEEP IT FOCUSED

As tempting as it is, don't pitch MOSS as the 'answer to all woes'. Pick the areas that matter most, and craft your business case around those. There's room for the other advantageous pieces of the MOSS pie on your roadmap in the years ahead. There's an impressive, growing ecosystem of MOSS partner products that augment MOSS's flexibility even further.

Get the focus right, and get MOSS in the door by demonstrating how well it responds to the most pressing requirements.

“There's room for the other advantageous pieces of the MOSS pie on your roadmap...”

### AND THE VERDICT IS...

Now back to your MOSS business case presentation to the executive team. You've completed your pitch, and breathe a sigh of relief. You've nailed it. Your executive team knows the economic recovery will start soon (if it hasn't already). They want the right technology enablers in place for them to take full advantage of the upswing. You got the all-important nod to start a pilot project.

But wait, there's more! Now for the easy part – a superb design and implementation. Pull together a strong delivery team and consider a partner to help you move you efficiently along your MOSS roadmap with best-practice by your side. Enjoy the journey and have lots of fun along the way.

“But wait, there's more!”





## ABOUT THE AUTHOR



### *Jane Headon*

*Jane Headon is the Managing Consultant at Unique World. Jane specializes in the field of information management, and has over twenty years experience gained across a variety of industry sectors.*

*Jane has played a pivotal role in the implementation of enterprise information portals for a number of companies, most recently at Transfield Services - a global outsourced services provider. Her achievements with MOSS were recognized with an Intranet Innovation Award in 2008. Jane's work has covered business case preparation through to solution design and implementation. She is passionate about getting the business requirements right, and delivering systems that maximize return on investment.*

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