

KORBYT™

**Build Your Business Case for
the Korbyt Anywhere Platform**



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Table of Contents

Initial Planning	2-3
Stakeholder Alignment	4-6
Gathering Requirements	7-8
Defining the Return of Investment	9
Defining Metrics & KPIs	10
Handling Objections	11
Creating Your Roadmap	12
Build Your Business Case	13

Initial Planning

Plan for Your Success

Your organization now has the opportunity to reach employees anywhere, through a consistent, engaging experience tailored just for them. Korbyt Anywhere helps you do just that. Engage all your employees through a combination of digital signage, mobile app, and desktop experience to:

- Deliver targeted, relevant messages that matter to employees in specific locations, roles, or teams
- Encourage employee participation through sharing, commenting, polls and submission
- Provide personalized access to important business apps to employees on-the-go

Organizations that use Korbyt Anywhere to transform the employee experience unlock the power of their greatest asset – their people. Engaged employees are more productive, offer better customer service, and drive more sales and innovation.

You understand the advantage. Now it's time to convince your key people of the same. This playbook on How to Build a Business Case will help you get approval and funding for your Korbyt Anywhere investment. Build consensus and momentum with this proven approach that makes it easy to get started and to collaborate with other stakeholders in your organization.

What Goes Into Your Business Case?

A standard business case includes:

- 1. Executive summary.** Convey the most important recommendations and rationale in 1-2 pages.
- 2. Return on investment (ROI) model.** Identify and measure the benefits of your organization's Korbyt Anywhere investment. You may need a spreadsheet to build your ROI model, but either way your business case document will include a summary visual.
- 3. Case for change.** Make the connection between your organization's strategic priorities, business objectives, and Korbyt Anywhere capabilities that help to resolve business issues. Spell out the benefits to overcome potential objections from each stakeholder group.
- 4. Business requirements for technology.** Outline the goals, context, and the capabilities or platform features needed to achieve the outcomes you've described.
- 5. High-level roadmap.** Identify and visually present the phases of the implementation and rollout of Korbyt Anywhere across your organization. This is your plan for how you will use Korbyt Anywhere's technology, what resources and processes you will need, and how you will measure success.



PRO-TIP

If your organization already has a standard format for a business case, use that template. Ask your leadership for guidance on the level of detail to include. Your finance and procurement professionals can also offer advice for first-time business case writers.

Initial Planning

First Time Writing a Business Case? No Worries.

Start strong with an outline.

Create a document and define sections with headers. Use those sections to organize your initial thoughts. As you gather new information, add what you learn into the relevant sections. Having even a rough draft documented and organized makes it easier to collaborate with others and helps you build a better final output.

Gather your stakeholders.

Enlist corporate communications, HR, IT, operations and facilities managers, and finance business partners. Then consider other communicators in different regions and business functions that may have an interest in workplace experience technology.

Create a shared vision.

Discover and document the value of Korbyt Anywhere for each stakeholder's business function. This will build momentum with receptive stakeholders already excited about the platform, and help win over hesitant stakeholders who are initially uninterested. In both cases you will be creating relationships with content contributors in advance of your implementation.

Finish strong with the executive summary.

Write a tight, persuasive summary based on the accumulated insight you have at the end of engaging with stakeholders and building the business case.

Where Do You Start?

1. Put your thoughts into written or visual form.

Choose a tool that helps you think and articulate your ideas. Bullet points in a document, sticky notes, a whiteboard – whatever works best for you works. Start with these questions:

- Why are you considering Korbyt Anywhere?
- What issues or problems are you trying to solve?
- What are the benefits for your company? (Think beyond your department or function.)
- What do you need? What are your basic requirements?
- Who else in the organization may have the same needs or concerns?
- Who could be the executive sponsor for Korbyt Anywhere?

2. Organize these in a shareable format, so others can follow your thought process.

Know your audience: some prefer presentations and others prefer documents.

What's an executive sponsor?

This is your senior executive who can establish the vision and is accountable for the success of your Korbyt Anywhere investment. An executive sponsor is a champion who can secure support from cross-functional departments and funding for the investment.

Stakeholder Alignment

Strike Up a Stakeholder Partnership

Look for your Korbyt Anywhere stakeholders among corporate communications, HR, IT, operations and facilities managers, business function leaders, and finance business leads. Partner with the decision-makers as well as their trusted team members who can help you with different parts of the business case. Titles vary, so use this list as a jumping off point to find the right stakeholders in your organization.



PRO-TIP

Responsibility for workplace experience strategy and outcomes may be shared by several groups, such as Communications, HR, and IT. Build a team to co-own your workplace experience strategy. Doing so now will help you build interest and support for investing in Korbyt Anywhere.

Stakeholder Group	Leader / Decision Maker	Trusted Team Member(s)
Corporate Communications	Head of Internal Communications	Content Strategist Content Manager
Human Resources	SVP of HR Head of Diversity & Inclusion (if different than SVP of HR) Head of Talent Management	Employee Experience Manager Benefits Manager Talent Management Manager
IT	CIO / CTO CISO (if different than CIO)	Digital Workplace Lead Security Lead Digital Communications Lead
Operations, Facilities & Real Estate	Head of Operations Head of Real Estate Head of Facilities	Operations Manager Real Estate Manager Facilities Manager
Contact Center	VP of Customer Contact Center	Contact Center Managers & Supervisors Contact Center IT Leads
Finance	Finance Business Partner	Financial Analyst
Legal & Compliance	Chief Compliance Officer	Data Privacy Lead
Regional, Business Functional Communicators	Internal communication is a fraction of their overall job Country Leaders Business Function Leaders Regional VPs of HR Regional Marketing Communications Leaders	Varies

Stakeholder Alignment

Stakeholder Best Practices

- Contact the leaders of each stakeholder group. Let these leaders know you plan to work closely with their trusted team members to explore a potential investment in Korbyt Anywhere.
- Collaborate with those trusted team members in each stakeholder group to identify potential benefits and gather requirements.
- Provide regular progress updates to the leaders. When you are confident that each document is reasonably complete, invite those leaders to review your requirements document and business case for their feedback.

Build the Case for a Workplace Experience Platform

Take a top-down approach to identify key issues and business improvement opportunities. This can be effective as you seek to align stakeholders across business units and functions.

1. Outline your organization's strategic priorities.

You can find these in many places. These would be your CEO's key goals in the year's first All-Hands meeting. For publically traded companies, top priorities can be found in the quarterly earnings presentations on the Investor Relations web page. For top-down organizations, priorities are often highlighted in the tool used for annual performance goal-setting. Or simply ask your business leader directly.

2. Engage leaders of each stakeholder group.

Understand their strategic objectives and how these map to your organization's overall priorities.

3. Connect the dots to Korbyt Anywhere.

Provide examples how this technology can deliver the strategic objectives for these stakeholder groups.

Use these conversation starters to guide your discovery with stakeholder groups.

Stakeholder Group	Example Strategic Objectives	How Workplace Experience Technology Makes This Happen
Corporate Communications	Increase employee engagement Drive organization culture Drive diversity & inclusion initiatives Support & reinforce change management initiatives	Reach all employees, deliver targeted, relevant, timely communications Streamline deployment of critical communications Enable two-way communications
Human Resources	Increase employee retention Reduce voluntary turnover Drive organization culture Drive diversity & inclusion initiatives	Optimize employee experience Greater consistency of D&I messaging across worksites Activate employee's use of their benefits and total rewards
IT	Enable change readiness & organizational change agility Enable business to self-serve (digital transformation) Drive greater productivity through digital tools	Reduce organizational risks of insecure / undocumented systems Rationalize variety of hardware, software & systems Enable secure and easy access to all data, enterprise systems and apps
Operations & Facilities	Reduce overhead costs Improve worksite safety Drive environmental & quality initiatives Reduce voluntary turnover	Reinforce training Replace manual processes, like printed handouts & signs Process excellence

Stakeholder Alignment

Continue your discovery with additional stakeholder groups, such as Finance; Legal & Compliance; and Regional, Business Unit & Functional Communicators and Leaders.

In each stakeholder group discovery session:

1. Present and discuss the shared vision for Korbyt Anywhere in your organization.
2. Confirm the group's strategic objectives.
3. Identify and prioritize their current business issues, areas for improvement, and obstacles to their improvement plans.
4. Review how they can attain their strategic objectives with Korbyt Anywhere.
 - Identify use cases and outcomes that would create business value.
 - Recognize implications of new technology, such as the need for resources and training. (Note these implications for your high-level roadmap.)

What's a use case?	This is a simple narrative which explains how a person or team who uses Korbyt Anywhere will accomplish a goal.
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5. Discuss how each stakeholder measures progress and defines success.
 - Identify behaviors that signal a transformation is underway.
 - Determine the metrics or KPIs stakeholders use to evaluate success.
6. Root out potential objections and alternative solutions under consideration.
7. Clarify jargon or acronyms. (Even in the same company, the same term can mean different things.)

Example Use Cases	Potential Business Benefits
Enable faster organization-wide response to evolving situations	Increased employee retention
Reduce duplication of communications effort across teams	Reduced costs
Deliver consistent, timely information across employee touch points	Increased first-call resolution in contact centers
Increase employee recognition across locations	Decreased absenteeism
Improve worksite safety communications	Decreased workplace injuries
Simplify the employee communications tech stack	Reduced time and cost to maintain disparate communication tools

Gathering Requirements

Meeting the Requirements

1. Define categories of requirements

Think about your different stakeholder groups, and partner with the individuals who can provide input and approve of new technology as it relates to:

- a. Employee experience (front-end/user experience)
- b. Communicator experience (content management/back-end)
- c. Integration with existing hardware, data sources, and business applications
- d. Information security and infrastructure
- e. Legal and compliance

2. Create a section in your requirements document for each category.

Give each requirement a unique identifier, such as “EE” for “Employee Experience”, “CE” for “Communicator Experience” or “LC” for “Legal and Compliance.” This will help to simplify discussion and any changes needed to your requirements document. Spreadsheets can be helpful here! For example:

Requirement ID	Business Requirement
EE-01	Employees can receive timely communications anywhere – mobile, desktop, and digital signage

Requirement ID	Business Requirement
CE-01	Ability to update on-site signage remotely
CE-02	Technology enables different levels of access to create communications
CE-03	Ability to deliver targeted messaging to employee groups by work site or business unit

Gathering Requirements

Meeting the Requirements


3. Use documented business requirements as a starting point.

Leverage high-quality examples and resources from your IT business partner, and specialists in Information Security, Compliance, and Data Privacy.

Requirement ID	Business Requirement
CE-01	Ability to update on-site signage remotely
CE-02	Technology enables different levels of access to create communications

4. Plan and lead discovery sessions to build one section at a time

Collaborate with other Stakeholders and process owners to discuss what requirements should be added, modified, or removed from the starting list you created.

 PRO-TIP	Small group conversations are often more effective to produce requirements.
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5. Schedule follow-up and review sessions as needed.

Defining the Return of Investment

Make Your Investment Count

Your discovery sessions with stakeholders provide a strong foundation for building the Return on Investment (ROI) model you'll need to justify the financial investment in Korbyt Anywhere.

You can build an ROI model that is cost-focused or revenue-focused. How will you know which approach to take?

Start with your organization's strategic priorities. This is the information you gathered in the previous step. Evaluate what you learned.

- If your organization is in cost-cutting mode: build your ROI model around reducing costs and avoiding future costs.
- If your organization is in revenue-growth mode: build your ROI model around capturing and monetizing new opportunities.
- If your organization is in business transformation mode: use a hybrid ROI model.

Identify common business benefits across stakeholder groups. Choose a maximum of three categories of high-value business benefits that line up with your discovery sessions and your business case recommendations.

- Saving costs
- Growing revenue
- Improving customer and employee experience metrics, such as customer satisfaction (C-SAT), net promoter scores (NPS), and/or employee engagement scores
- Driving other corporate priorities, such as digital transformation; diversity & inclusion (D&I); corporate social responsibility (CSR); or environmental, social, and governance (ESG)

Calculate the expected financial benefits in each category. Work with your finance business partner and stakeholder groups to gather data, test assumptions, and create estimates you can defend.

- Saving costs
- Growing revenue
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PRO-TIP

Collaborate to learn from others in your organization.

- Identify baseline costs or revenue data.
- Estimate the expected decrease in costs or growth in revenue.
- Determine when benefits will become real. Some benefits happen immediately after implementation, while other benefits will manifest over time. For example, if you will rollout Korbyt Anywhere in phases, your benefits will likely be realized in similar steps.



PRO-TIP

Your high-level roadmap for implementation and rollout will help you figure out which benefits will be realized over time, and when. (See the roadmap section for more advice.)

- Establish preconditions for success, such as the need for resources and training.
- Analyze the risks-to-benefits ratio.
- Define the metrics and KPIs each stakeholder group will use to evaluate success.

Defining Metrics & KPIs

Measure Progress with the Right Metrics & KPIs

Your discovery sessions and work on the ROI model will uncover key information about the metrics and KPIs each stakeholder group will use to evaluate success.

Use this to now plan how you will monitor your organization’s progress toward reaping financial benefits from an investment in Korbyt Anywhere.

1. Start with the high-priority metrics and KPIs defined in the previous step.

2. Build a benefits realization dashboard.

If your company has a standard approach, use that. Otherwise, ask your finance business partner or management reporting team for support. At a minimum, plan to include:

- Each metric or KPI
- Baseline value (starting point) with an as-of date
- Target value (desired result) with a target-by date
- Current value with current date
- A percent-to-completion calculation

Example Success Metrics for Human Resources				
Success Metric	Baseline as of 1/1/21	Target by 12/31/21	Performance as of 4/30/21	%-to-Completion
Decrease voluntary turnover	36%	25%	31%	45%
Increase employee engagement scores	45%	70%	52%	28%
Increase employee referrals per month	4	12	8	50%

3. Update your executive sponsor and stakeholder groups at planned intervals.

Provide a link to the dashboard or copy of the report. Include any success stories with your update. If certain metrics appear as if they will improve faster than others, be prepared to explain the reason behind the numbers.

Metrics Best Practices

- Build a prototype and get feedback before you create your dashboard. It’s easier to get feedback on the design with something tangible to show stakeholders.
- Double-check your data by comparing it to other sources. Make sure each number makes sense.

Handling Objections

From Objection to Agreement

Your conversations with stakeholders may have revealed a few objections.

How can you manage these challenges?

Here are some recommended approaches to manage objections in your organization.

Potential Objection	Most Often Heard From	Ways to Manage Objections
That costs too much	Finance Senior Executives	Engage finance in deeper conversation around the ROI model and identified benefits. Meet one-on-one with senior executives to discuss the areas they prioritize. Identify what existing technology can be replaced by Korbyt Anywhere. Explore alternatives, such as a phased rollout or narrower scope of implementation.
We do not have the resources to support that	IT	Clarify what resources your IT team needs to support Korbyt Anywhere. Clarify if this is a “not now” or a true no.
We already have other technology we can use instead	IT Senior Executives	That technology doesn’t have the same Korbyt Anywhere capabilities that we need

Take into account any objection from every stakeholder, and brainstorm how you could manage and overcome each. A winning business case will address the potential objections and articulate why Korbyt Anywhere remains a smart investment for your organization in the case for change.

Creating Your Roadmap

Mapping Your High-Level Roadmap

A high-level roadmap is a visual representation of the work required to implement and rollout your new workplace experience technology. A three-phase roadmap is common, but feel free to add more phases if your organization’s rollout will be complex.

Your roadmap is a framework to improve planning across your organization. As you discuss the roadmap with each stakeholder group, you are getting buy-in and reinforcing the shared vision for how your organization will succeed using Korbyt Anywhere.

Phase 1	Phase 2	Phase 3
Create Master Project Plan	Create Governance Strategy, Playbooks & Policies	Engage Site Leaders & HR Teams Ahead of Launch
Technical Planning & Implementation	Plan Launch, Campaigns & Content, Create Early Content	Execute Launch Campaign
Data Integration	Define & Test Employee Segments	Rollout Korbyt Anywhere to Employees Across Worksites
Train Primary Communicators	Recruit & Train Regional Communicators	Recruit & Train Functional Communicators
Develop Comms Strategy & Launch Plan	Create Change Management Plan	Document Quick Wins

Build Your Business Case

Produce the Final Business Case

Let's recap the work you've completed so far. You identified and aligned with stakeholders; gathered business requirements; determined ROI; defined the right metrics & KPIs to measure progress; managed objections; and created a high-level roadmap.

Now you're ready to produce the final business case.

1. Review your outline and your notes.

2. Finalize the case for change.

Ensure your case for change answers:

- How does Korbyt Anywhere enable our organization to achieve its strategic priorities?
- What business issues does Korbyt Anywhere resolve, for key stakeholder groups?
- Why is Korbyt Anywhere better than the current state or alternatives?
- Who are the Stakeholders who contributed to and support this business case?

3. Finalize the business requirements file.

Attach or embed the document in your business case.

4. Finalize the ROI model.

Insert a summary visual and 1-2 paragraphs describing the sources of value and expected time to achieve that value. Attach or embed the spreadsheet in your business case.

5. Finalize the high-level roadmap.

Include a list of resources, processes, and tools which you will need for a successful implementation and rollout of Korbyt Anywhere.

6. Write your executive summary.

Use the key points from each section.

7. Proofread and submit your business case and attachments to your business leader for approval.

Congratulations on making your case!



Learn more about the
Korbyt Anywhere Platform.

www.Korbyt.com/demo