

How to Build a Business Case for IT Glue



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Secure, Mature, Integrated

You understand the value of documentation and are eager to get a new documentation solution up and running.

If only it were that easy.

If the cost of the solution is below your approval threshold, you're golden.

However, for most folks, whether you're the IT manager, on the service desk or even higher up in your company's IT department, you probably have to get approval from someone else — and that approval might be contingent on getting buy-in from some other stakeholders as well.

So, you temper your excitement about the new documentation solution, take a deep breath and dive into what for most folks is the most painful part of the process — the paperwork.

There's a good way to do this, and also a bad way. What we'll be talking about in this eBook is how to build your arguments in such a way that everybody, even the folks in the finance department, can understand.



Salesperson or advocate?

If you're in IT, you probably don't think of yourself as a salesperson. Heck, you probably have an active dislike of the idea of sales. However, if you're trying to convince somebody of something, aren't you "selling"?

The good news is that making a business case for a new piece of software isn't the same thing as being a sales rep. You're not grinding out a living on the used car lot — you're advocating for something you genuinely want and need.

The difference is huge, because when you're invested in something, you'll sell it without even realizing you're selling it. You are advocating for yourself — for your free time, peace of mind and job performance. Think about why you want this IT documentation solution and tap into that positivity when advocating for it during the approvals process.

Although the end result is the same — you get the approval for the next purchase — the advocacy approach is a lot easier for anybody who doesn't have a sales background.



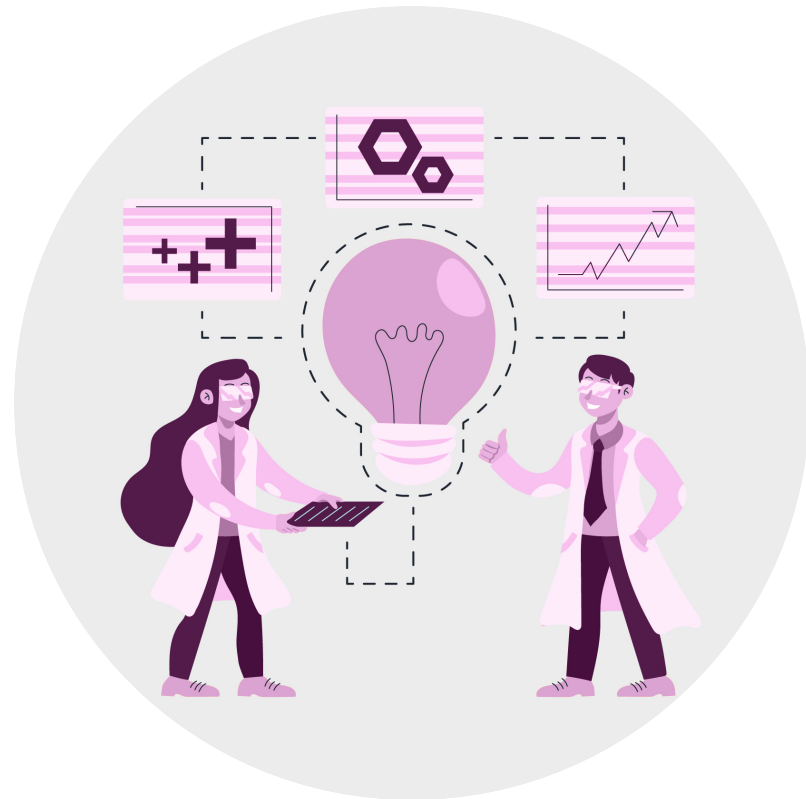
What does your audience care about?

You can probably explain why you care about IT documentation, but other stakeholders might not care at all. However, they do care about something. Once you know what they care about, you can make the case that IT documentation helps them with things that matter to them.

Finance might want to see some sort of ROI. The CTO might not care about the help desk but might really care about a big cybersecurity project that's been slow to get off the ground due to bandwidth issues. The COO might be worried about containing overall costs in an inflationary environment.

There's always something. Figure out what that something is and then you'll be better equipped to advocate for your new solution.





Explaining the concept

You may or may not have to explain the concept of IT documentation to someone during the approvals. Your CTO should get it right away. However, if the person approving is in Operations or Finance, you may need to explain the concept.

The best approach to explaining the concept is to start with the current state and then elaborate on the state the software will get you. Then, compare that difference with the cost of achieving it.

For IT documentation, you can obviously document things just about anywhere, and that's what most people do, including those signing off on your budget request. However, the key to documentation goes beyond having stuff written down. The key to great documentation is finding the information you need when you need it. Whether it's policies, procedures, asset information or passwords, the more consistent the documentation, the more likely you can find and use that information later.

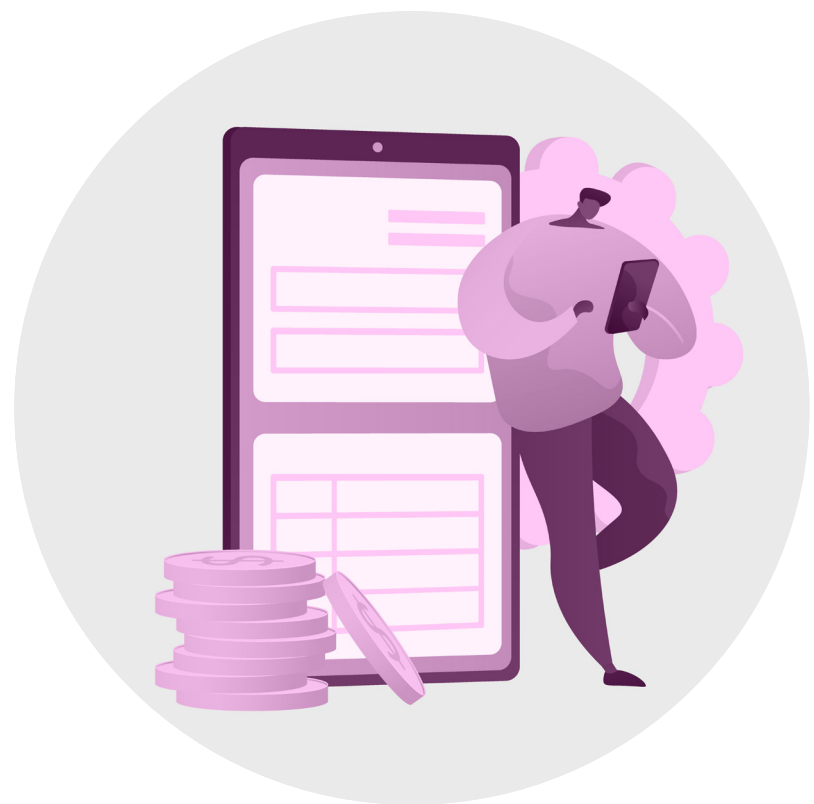
Being able to find and use that documentation, in turn, improves the time to handle tickets, reduces cybersecurity risk and allows you to standardize both your customer service and your technology stack. All of these things result in positive financial impacts.

Every team in every business, more or less, faces a similar challenge. The Finance or Accounting team doesn't care about IT assets, but they also have a lot of information and need to keep it in a structured, centralized location for easy access. If they are being audited or need to produce reports for the executive team, having that information at their fingertips makes it easier to do so.

Smart IT documentation works the same way. You get everything done faster and more efficiently because the information you need is intelligently presented at your fingertips.

Intelligence-driven IT documentation is structured, automated and centralized.





Replacement costs

One of the benefits of IT Glue, which is likely apparent to you from an operational perspective, is that you can use IT Glue to replace a number of other tools. Suppose you're using a password manager, spreadsheets to document serial numbers, Wiki or Knowledge Base software, or whatever you're doing about network diagramming. In that case, that's a lot of knowledge spread across multiple tools — and you might be paying a fair bit of money for everything combined.

It's not uncommon that companies adopting IT Glue end up spending less on software because they end up with one tool to perform many functions, and it's actually cheaper when the costs are compared.

If that's not the case, no worries. There's still the ROI conversation.

Where's the ROI?

The ROI question can be quite daunting. That's because many people are accustomed to thinking of ROI in direct terms. Direct ROI is the easy-to-measure stuff, like adding a new sales rep or launching a new product.

Indirect ROI is trickier, but once you get the hang of thinking about it, you can make a case for just about anything.

You can make an ROI case for playing video games on your lunch hour instead of working. That's right. A refreshed brain is more efficient in the afternoon and better equipped to solve problems than a brain that worked through lunch.

The ROI for IT documentation starts with an intelligence-driven structure that helps you get started the right way from day one, setting you up for success with an easy and intuitive setup process.

With out-of-the-box templates and deep workflow integrations with the rest of your tool stack to automate every step of your tasks, the power of smart IT documentation is manifested through improved technician efficiency, better compliance standards, lower cybersecurity insurance premiums and opportunity costs related to what you'll do with the extra time you have (i.e., other IT projects that you need to do).

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A great way to spur the right person to think about this is to ask them what it costs when systems or departments go down. If they don't know, they'll start to wonder, quickly realizing that investing in preventing or reducing downtime is a wise choice.

Intelligent IT documentation streamlines every part of your operations, including onboarding, daily tasks, collaborating with clients and everything in between. The ROI instantly becomes clearer when you highlight the main problem with which the stakeholder you are conversing is most directly involved. A structured and smart documentation tool can help answer the ROI question.



To put this in monetary value, you must calculate your ROI in terms of technician time saved, technician cost, number of technicians and opportunity cost. Our ROI calculator can give you a good starting point when selling your documentation dreams internally.



Why?

Ultimately, the approvals process is about making sure that you know the answer to the question “why?” and that the answer makes business sense. So, let’s get into the why.

Write down three answers to why you want to invest in IT documentation. With this investment, you’re solving problems related to organization and time waste as well as being able to stretch your budget further by making your team more efficient. In some businesses, IT documentation is part of the cybersecurity strategy or at least a means of demonstrating compliance.

Once you’ve identified the three biggest business challenges you’ll be solving with IT documentation, ask “why?” again. Pretend you have to explain this to a toddler. Not because your approvals people are toddlers but because they don’t know your operations as well as you do. They need you to highlight the connection between IT documentation and solving each of the three biggest challenges.

Have an example ready for each point, preferably with numbers. If there’s one thing Finance people and budget holders like, it’s numbers.

Challenge #1

Hypothetical problem #1: The help desk techs are swamped all the time, and we don't have the budget for more headcount.

How IT documentation helps: Our techs end up spending a couple of hours every day looking for information. If we make it easy to find the information they need, we can get 1.5 of those hours back every day. On our team, that's 0.75 FTEs.

Hypothetical problem #2: The internet went down at the Albuquerque warehouse the other day, and it took four hours for us to troubleshoot the issue because the documentation was incomplete. If we had IT Glue, we would have had complete documentation and been able to resolve the issue three hours sooner.

How IT documentation helps: Every hour Albuquerque is offline costs us \$100,000. With IT Glue, we could have fixed the problem in one hour instead of four hours. That's \$300,000 in savings for the company, just based on a single incident.

Challenge #2

Hypothetical problem #1: We got audited, and it took forever to find the information the auditors needed.

How IT documentation helps: The documentation system provides a means to have all our mission-critical documentation in one place. The structured nature of this documentation also means that our documentation is complete, which auditors tend to prefer.

Hypothetical problem #2: We had an annual disaster recovery audit. Last year, we were missing a lot of documentation pertaining to the hardware at our different facilities. This lack of knowledge meant we paid more for our cybersecurity insurance and were covered for less.

How IT documentation helps: This year, we have discussed the matter with our insurance company, and they believe that with complete and easy-to-access documentation, we can reduce our cybersecurity insurance premiums by \$100,000 on an annual basis.

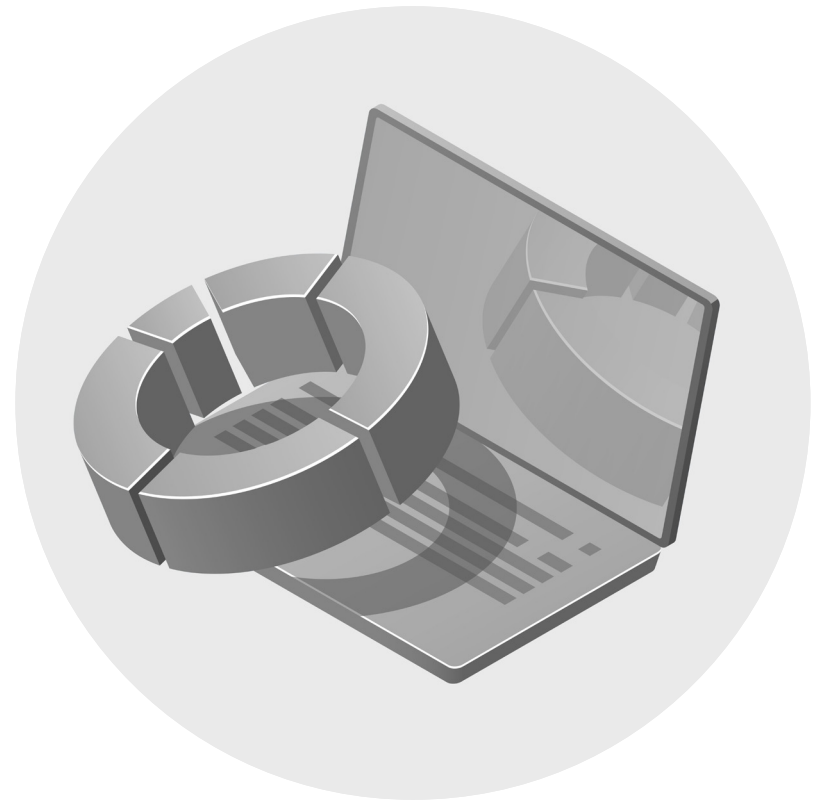
Post-hoc justification

You may also, at some point, do a budget review to justify the expenditure and its ongoing nature.

If you did see your cyber insurance premiums decline as predicted, or see your service desk metrics improve, you want to be able to show that. After writing out what you believe will be the benefits, measure the current state of your key metrics to compare them with next year.

This way, not only will you know the impact of your new documentation system, but you'll also be able to show it.

A few numbers go a long way if you ever need to revisit this.





Conclusion

Ultimately, advocating for an intelligent tool that will save the company a lot of money and make your life easier shouldn't be that difficult. In some companies, it won't be, but in other companies, you need to be prepared to convince a few folks.

The key is just to outline your different arguments ahead of time, back them up with research and then advocate for yourself.

Secure, Mature and Integrated Documentation



Make documentation easy

Create and store KB, checklists and SOP articles effortlessly, embed rich network diagrams or import Word documents so your team is empowered to train and help themselves.



See the complete picture

Link related items together, so that all the information you need is at your fingertips. Rapidly define and understand relationships between various elements of your documentation.



Secure your critical information

Sleep better with next-level password management featuring access control, host-proof hosting, at-risk password report and audit trail.



Build a documentation culture

Edit and collaborate directly within the platform. Automatically save and sync to ensure your documents are always up to date for all team members.

Trusted by More than 13,000 Partners in 70+ Countries



STREAMWOOD
ILLINOIS

REVO
HEALTH



Safeguard Your IT Operations With Secure Documentation

Request a Demo

When it comes to data security, [IT Glue](#) is second to none. We have achieved a SOC 2 Type-2 attestation, a set of data security and service controls that can only be maintained through ongoing, company-wide commitment.

