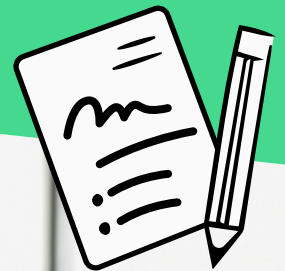




How to Build a Business Case for Internal Communications Software



contactmonkey.com



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1. Introduction

The role of internal communications is becoming increasingly central to how companies navigate uncertainty, retain talent, and maintain a cohesive culture. In the face of rapid change, clear and consistent messaging doesn't just reduce confusion—it builds trust, aligns teams, and creates the necessary conditions for an engaged workforce.

Yet despite its growing strategic value, internal communications often remain underfunded and underappreciated. According to our Global State of Internal Communications Report 2025, 52% of IC pros work with zero fixed budget and 8% of communicators report having less than a \$50K budget to work with. For internal communicators, there is an obvious challenge when it comes to securing a healthy budget. And unfortunately, we've seen time and time again that it's up to the communicators themselves to advocate for the funding they need to hit their departmental goals. This starts and stops with a strong business case.

In this guide, we'll share how to structure a strong business case with the fundamentals, tips and tricks for success, and an editable PDF template plus a BONUS presentation that you can leverage. By the end of this guide, you'll have a better understanding of the next steps to secure budget for your game-changing IC software!

Here's what your business case for internal communications software should highlight:

- **Time savings:** Automated, streamlined comms mean less time hunting for info—and more time spent doing what really matters.
- **Increased productivity:** When people have access to the right information at the right time, they're empowered to work smarter, not harder.
- **Happier employees, lower turnover:** Clear, transparent communication fosters trust and belonging, which are key ingredients for satisfaction and retention.
- **Improved efficiency per employee:** Fewer misunderstandings and miscommunications lead to smoother workflows and better use of everyone's time.
- **Higher eNPS scores:** Engaged employees are proud employees—and proud employees are far more likely to recommend your company to others.

When you present these benefits to leadership in a compelling and data-backed way, you're not just asking for a budget—you're making a business case for better collaboration, a stronger culture, and a more efficient organization.



As you follow along to learn how to build your business case for internal comms software, click on each section header to be re-directed to the corresponding template section.

2. Building Your Business Case for Internal Communications Software: Step-by-Step

A strong business case should tell a clear, compelling story. To make your proposal for internal email software stand out, you'll want to structure it in a way that's easy to follow and hard to ignore. Let's walk through each key section to help you build a persuasive case that gets leadership buy-in.

2.1 Executive Summary: Set the Stage

Your executive summary is the elevator pitch of your business case for IC software budget—it should clearly state what you're proposing and why it matters. This is where you introduce the core goal of your proposal and the value it brings to the business.

The length of your summary depends on the complexity of your proposal. Some may include subsections that briefly outline the different parts of the case. The golden rule? Be concise, but informative—every word should earn its place.

PRO TIP

Match the flow of your summary to the order of the rest of your business case. It helps readers follow your logic more easily as they dive deeper into each section.

2.2 Problem Statement: Paint a Fuller Picture

Here's where you roll up your sleeves and dig into the problem your proposal solves. Start by outlining the core issue, then walk readers through the current state of your internal communications and what's not working.

Include key details like:

- How internal communications are currently handled
- Time and costs associated with current processes
- How growth is (or will be) putting strain on your comms setup

The goal here is to show the gap between where things are now and where they need to be—making a strong case for change.

Why this matters: If leadership doesn't fully understand the problem, they won't feel the urgency to solve it. So be specific and quantify the impact wherever possible.

Here's a simple structure to follow:

- **Problem Statement:** A short, sharp summary of the issue—just one or two sentences.
- **Description:** Give the full context. What challenges are employees or comms teams facing? What opportunities could open up by investing in the right software?
- **Risks:** Spell out the consequences of not taking action. These might include low employee engagement, high turnover (and the associated costs of rehiring, onboarding, and training), increased time spent managing comms for a growing workforce etc.

PRO TIP

Use real-life examples from your company (or anonymized industry examples) to illustrate what these risks look like in action. And if you have benchmarks or metrics (like from the [Internal Email Benchmark Report](#)) you want to improve—like open rates, engagement scores, or employee feedback—this is the place to highlight them.

2.3 Proposed Solution: **Introduce the Game-Changer**

Now that you've made a compelling case for why your current approach isn't cutting it, it's time to spotlight your proposed solution—and show exactly how it addresses the problems you've just laid out.

Think of this section as your chance to connect the dots between your internal communication challenges and the powerful capabilities of [internal email software like ContactMonkey](#).

Here's a simple solution structure to follow:

- **Solution:** Start with a one- or two-sentence summary of what you're proposing. Keep it clear and straightforward.
- **Description:** Now zoom in. Break down the key features of the solution and what they actually do. Don't just list tools—tie each one to a specific challenge you mentioned earlier.

PRO TIP

If a feature is especially relevant to your audience, like email analytics for data-driven leaders or survey tools for HR teams, consider including a screenshot or simple graphic. Just keep it focused—quality over quantity.

2.4 Alignment with Business Goals: **Show the Strategic Fit**

To get leadership on board, connect your proposed solution to broader company goals. This section highlights how investing in internal email software supports (and accelerates) the organization's top priorities.

Answer the question: *How does improved internal communication help us meet our business objectives faster or more efficiently?*

Here are a few examples of strong alignment:

- **Goal: Improve employee engagement and retention**

ContactMonkey's analytics help you know what engagement initiatives are working or not. Plus, access two-way communications that offer insights and help improve decision-making.

- **Goal: Scale operations effectively**

As your company grows, ContactMonkey enables you to maintain clear, consistent communication without ballooning your internal comms workload.

- **Goal: Increase productivity and operational efficiency**

Reduce time spent on email creation and distribution, freeing up your team to focus on higher-value work.

- **Goal: Strengthen company culture and transparency**

Encourage open communication and real-time feedback to build trust between leadership and employees.

Make this section specific to your organization's strategic plan. When you speak the language of leadership, your case becomes much more persuasive.

2.5 ROI and Value Proposition: **Prove the Payoff**

It's not enough to say a tool is helpful—you need to show the return on investment (ROI). This section is all about making the value of internal email software tangible and measurable.

Start by outlining the key areas of ROI:

- **Time saved:** Streamlining email creation, sending, and follow-up = fewer manual tasks, faster turnaround times.
- **Improved engagement:** More relevant, personalized comms drive better open and click rates.
- **Faster decision-making:** Real-time feedback and analytics give leadership immediate insight into what's working (and what's not).
- **Retention & morale boost:** Transparent communication builds trust—and reduces costly turnover.

Use metrics where possible: project percentage increases in email engagement, reductions in email creation time, or estimated savings from reduced turnover. Even rough estimates can be powerful.

2.6 Cost Analysis: Lay Out the Investment

Decision-makers will want to know: How much will this cost, and what exactly are we paying for?

This section should clearly outline:

- License or subscription fees (monthly/annually)
- Number of users or departments included
- Training or onboarding support
- Estimated internal resource time (if applicable)

Be transparent and realistic—it builds trust.

PRO TIP

Include a basic cost-benefit comparison. Show how the investment compares to potential cost savings from time saved, reduced turnover, or improved productivity.

2.7 Risk Assessment: Address Concerns Head-On

No business case is complete without acknowledging potential risks. But rather than avoiding them, this section shows you've done your homework—and have a plan to mitigate them.

Consider including:

- **Risk: Low adoption from employees**

Mitigation: Easy-to-use interface and integration with familiar tools like Outlook and Gmail reduce learning curve. Include training and internal champions.

- **Risk: Data privacy and security**

Mitigation: ContactMonkey is SOC 2 compliant and built to meet strict data protection standards.

- **Risk: Lack of measurable ROI**

Mitigation: Built-in analytics provide detailed reporting on email engagement and sentiment, allowing for continuous optimization.

- **Risk: Budget limitations**

Mitigation: Show how costs are offset by measurable gains in time savings and employee retention.

Keep it honest, but confident. This section reassures decision-makers that the benefits outweigh the risks—and that you're prepared to navigate challenges.

2.8 Onboarding Roadmap: From Approval to Implementation

A solid project plan shows stakeholders you're ready to roll. Use this section to outline key phases and timelines, so leadership knows exactly what to expect.

Suggested project phases:

- **Approval & procurement** (Week 1-2)

Finalize the budget, secure vendor agreement and start your prep work for implementation.

- **Onboarding & training** (Weeks 2-3)

Team setup, admin training, and content import.

- **Pilot launch** (Weeks 4-5)

Test with one department or campaign; gather feedback and measure early results.

- **Full rollout** (Week 6 onward)

Launch across departments, with ongoing support and optimization.

- **Review & optimize** (30/60/90 day checkpoints)

Use analytics and feedback to refine your comms strategy.

PRO TIP

Include milestones, responsible teams, and estimated timelines for each phase. The more prepared you look, the easier it is for leadership to say yes.

2.9 Conclusion & Recommendations: **Bring It All Home**

When building a business case, one size doesn't fit all. Different departments view investments through different lenses—what resonates with Finance may not carry the same weight with IT or HR. That's why it's essential to align your messaging with the specific priorities of each stakeholder group.

Wrap up your business case with a strong, confident conclusion. Summarize:

- The problem at hand
- The proposed solution (ContactMonkey)
- The strategic benefits and ROI
- The low risk and high reward
- A clear plan for success

Recommendation: Move forward with implementing ContactMonkey to modernize and scale our internal communications, drive engagement, and align with company goals.

Remind stakeholders that this isn't just a software purchase—it's a step toward a more connected, informed, and engaged workforce. And, make sure that your conclusion and recommendations are specifically tailored to the various stakeholders you will be sharing your business case with.

Actioning the Insights: **Ready to Bring It All Together?**

Now that we've covered each component of a strong, persuasive business case—from identifying the problem to mapping out the solution and proving ROI—it's time to put it all into action. Below you'll find a complete, business case template that brings everything you've read about above, together. You'll also find a business case example in the section that follows if you prefer to present your business case via PDF or a Word document.



Presenting your business case to leadership? Download our **FREE Business Case for Internal Communications Software** slide deck! We've covered the ideal format, you just input your own copy!

Business Case for Internal Email Software: Elevating Internal Communications with ContactMonkey



*Here, you'll find a fully completed business case example. You can use this example as is, or copy the content into a Word doc and customize it as you see fit. You'll also find editable fields under section 6. **Cost Analysis** and an editable PowerPoint case study at the end of this section.*

1. Executive Summary

In a time of continued workplace evolution—marked by hybrid work, tightening budgets, and shifting employee expectations—clear, consistent internal communication has become a strategic imperative. However, many organizations are still relying on outdated tools that make it difficult to engage employees effectively, measure impact, or scale communications with agility.

This business case proposes the adoption of ContactMonkey, an internal email software that integrates directly with Outlook and Gmail. ContactMonkey empowers communications and HR teams to send beautifully designed, targeted, and measurable internal emails without IT dependency—helping organizations strengthen culture, improve alignment, and make data-informed decisions.

2. Problem Statement

As our business grows and adapts to a more complex, fast-paced work environment, our internal communication tools haven't kept up. What once worked for a smaller, more centralized team is now falling short—leading to inefficiencies, missed messages, and disengaged employees. Without a clear path to scale communication effectively, we risk falling behind in both performance and culture.

Problem: Our current internal communications processes are fragmented, time-consuming, and offer limited insight into whether messages are reaching or resonating with employees.

Description: Internal emails are often built manually, sent via traditional email clients, and lack analytics capabilities. Messages are not consistently reaching the right employees, and there's no way to measure open rates, click-throughs, or employee sentiment. As our workforce grows and evolves, this approach is increasingly unsustainable.

Challenges:

- Growing demand for timely, relevant employee communications
- Limited visibility into internal email engagement
- Increased workload for comms and HR teams
- Lack of personalization or segmentation
- Missed opportunities for employee feedback

Risks of inaction:

- Declining employee engagement and morale
- Increased turnover and rehiring costs
- Misinformation or disengagement in times of change
- Weakening trust in leadership
- Poor ROI on internal initiatives due to lack of visibility

3. Proposed Solution: ContactMonkey

To address these challenges, we propose adopting ContactMonkey, an internal email software that integrates directly into Outlook and Gmail. It enables teams to send engaging, measurable, and targeted communications—while eliminating manual processes and guesswork.

Solution: Implement ContactMonkey's internal email software to streamline employee communications, improve engagement, and enable data-driven decision-making—directly from Outlook or Gmail.

Key features

- Email templates & drag-and-drop editor: Quickly create branded, mobile-responsive emails without relying on design or IT. Perfect for fast-growing teams that need to scale comms quickly.
- Dynamic content and distribution lists: Send the right messages to the right people without manual updates, even in rapidly evolving org structures.
- Email tracking & analytics: Gain real-time insights on open rates, click-throughs, read time, and more—so you know what's landing and what's being missed.

- Pulse surveys & emoji reactions: Collect instant feedback from employees and measure sentiment directly within the email.
- Integration with Outlook & Gmail: Send personalized, targeted communications at scale—without leaving your inbox.

Benefits

- **Time savings**: Mettler Toledo reduced comms workload by 25+ days annually
 - **Increased engagement**: BASF used analytics to optimize content and improve open rates
 - **Better insights**: Real-time metrics support smarter decisions and better content strategies
 - **Improved alignment**: Ensures the right people receive the right message at the right time
 - **Employee feedback loop**: Enables two-way communication with built-in survey tools
-

4. Alignment with Business Goals

ContactMonkey isn't just a tool for the comms team—it's a strategic investment in operational efficiency, employee experience, and long-term business health. ContactMonkey directly supports several of our current and future priorities:

- **Employee engagement & retention**: Engaged employees are more likely to stay—and to advocate for the organization.
 - **Operational efficiency**: Streamlined communication processes reduce workload and improve productivity across teams.
 - **Culture & transparency**: Better communication fosters trust and a stronger, more connected workplace culture.
 - **Data-driven decision making**: Analytics enable continuous improvement and alignment of comms strategy with business outcomes.
-

5. ROI and Value Proposition

Internal communications often gets overlooked in budgeting conversations—but the value it brings is real and trackable. ContactMonkey delivers a strong return on investment by saving time, improving engagement, and reducing employee churn.

Estimated gains:

- **Time saved:** Equivalent of 2+ days/month on email creation and distribution
- **Reduction in turnover:** Even a small improvement in retention translates into thousands in savings
- **Improved engagement:** Higher email engagement can lead to more informed, productive teams
- **Smarter investments:** Data helps focus efforts on what's working

Example: ContactMonkey saves 25 days per year or 4 hours of work a week by eliminating manual content creation. Learn more here by reading about [Mettler Toledo's story](#).

6. Cost Analysis

ContactMonkey offers a flexible pricing structure that adjusts to the size and needs of our organization. The costs are minimal compared to the measurable gains in efficiency and engagement.

While the upfront investment in ContactMonkey depends on your user count and selected features, the value it delivers far outweighs the cost—especially when measured against time saved, reduced turnover, and improved employee engagement.

Estimated costs include:

- **Annual license:** Scales based on the number of users and features selected (custom quote available).
- **Onboarding and training:** Often included in the license fee; otherwise available at minimal cost.
- **Internal admin time:** Minimal; most teams are fully onboarded within two weeks.

Cost savings and value:

- **Time savings:** Companies like Mettler Toledo saved over 25 days/year by streamlining email creation.
- **Improved engagement:** More effective messaging means employees are more informed, aligned, and productive.
- **Retention benefits:** Better communication contributes to reduced turnover, which lowers hiring and training costs.

- **No IT overhead:** Seamless integration with Outlook and Gmail means no new platforms or infrastructure.

Use this template and populate the the editable fields with custom pricing information you've received:

Cost Category	Estimated Cost	Notes
Annual License		
Onboarding & Training		
Internal Admin Time		
Other (if applicable)		

7. Risk Assessment

Every investment comes with risk—but ContactMonkey's low learning curve, enterprise-grade security, and proven ROI significantly reduce the likelihood of issues. Here's how potential risks are mitigated:

1. Risk: Low employee or team adoption

- **Mitigation:**
 - Easy-to-use interface
 - Built into Outlook/Gmail—no new logins required
 - Hands-on training and internal champions encourage adoption

2. Risk: Data security and privacy

- **Mitigation:**
 - SOC 2 compliant
 - Data encryption and strict access controls
 - Aligns with corporate IT and security policies

3. Risk: Difficulty measuring ROI

- **Mitigation:**
 - Real-time analytics dashboard shows open rates, engagement, and read time
 - Pulse surveys and feedback tools measure employee sentiment
 - Enables continuous optimization and reporting

4. Risk: Budget constraints

- **Mitigation:**
 - Clear cost-benefit case
 - Time saved, increased engagement, and improved retention offset cost
 - Scalable pricing makes the tool accessible for growing teams
-

8. Onboarding Roadmap

ContactMonkey's onboarding is fast, easy, and designed to get your team up and running with minimal disruption. The full process typically takes 2–3 weeks from installation to complete team enablement.

Week 1: Quick Start & Setup

1. Install ContactMonkey

- **Time required:** 5–10 minutes
- **Details:** Lightweight installation for Outlook or Gmail. No IT lift needed.

2. Intro to Customer Success Manager (CSM)

- **Timing:** Within the **first week of signing**
- **Purpose:** Meet your dedicated CSM who will guide you through onboarding, training, and ongoing support.

Week 1–2: Training & Enablement

3. First One-Hour Training Session

- **Timing:** Within the **first or second week**
- **Audience:** Admins, HR/comms teams, or key users
- **Focus:**
 - Navigating the platform
 - Creating and sending emails
 - Using analytics and feedback tools
 - Customizing templates and dynamic distribution lists

Week 2–3: Continued Learning & Optimization

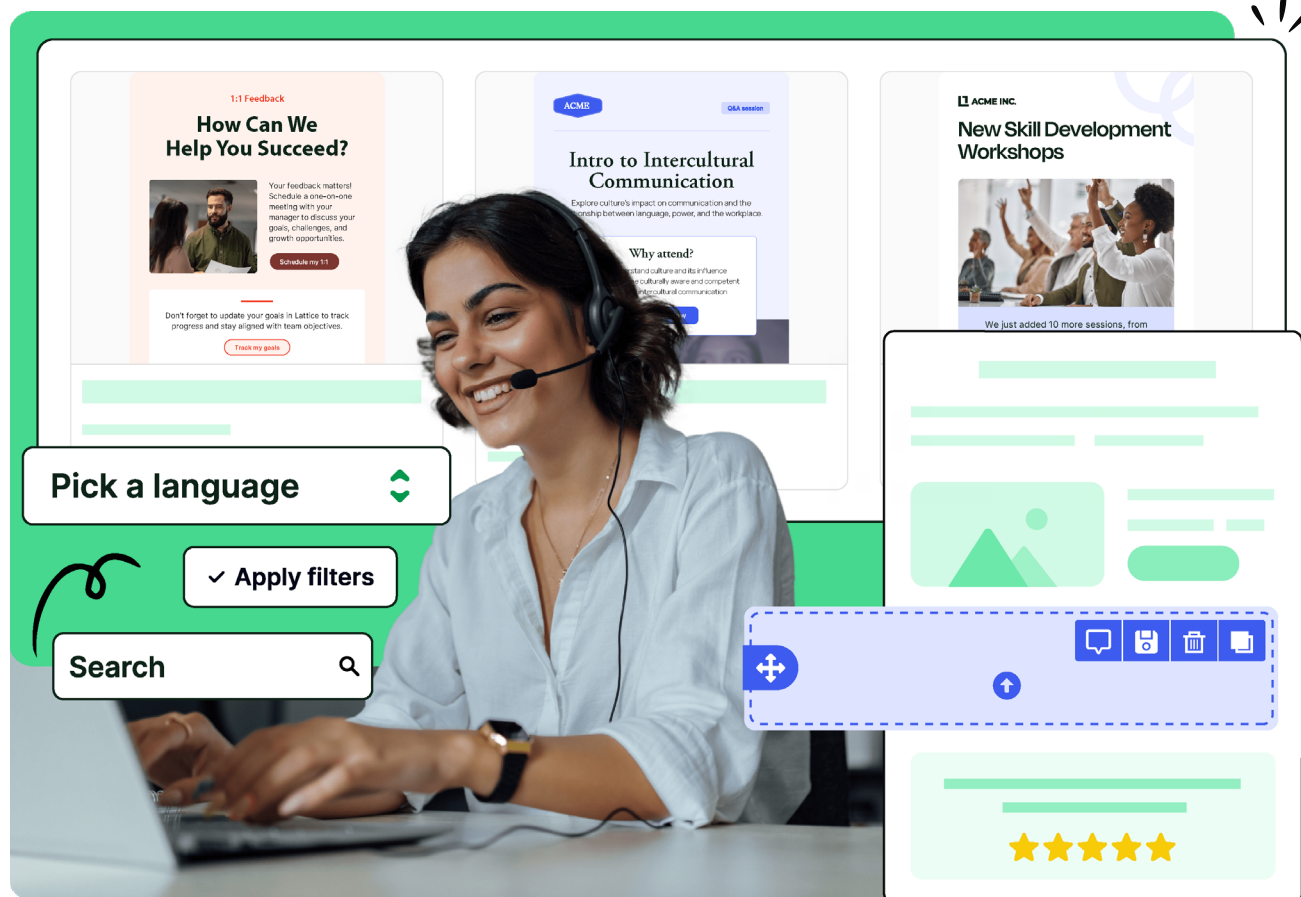
4. Second One-Hour Training Session

- **Timing:** Also held **within the first or second week**, but can be scheduled flexibly
- **Purpose:**
 - Deep dive into advanced features
 - Q&A and troubleshooting
 - Review early results or pilot email metrics
 - Finalize rollout best practices

Onboarding Close & Next Steps

5. Handover & Close

- **Timing:** End of Week 2 or beginning of Week 3
- **Purpose:**
 - Confirm successful onboarding
 - Set goals for continued optimization
 - Establish cadence for check-ins with Customer Success Manager



Tailored Recommendations for Key Stakeholders

Below, you'll find customized **conclusions and recommendation** statements for key decision-makers, including the **Executive Leadership Team, Finance, IT, and HR**. Each version is designed to speak their language, address their concerns, and demonstrate how ContactMonkey supports their unique goals—while still reinforcing the overarching value to the business.

Use these tailored messages in presentations, emails, or supporting documents to strengthen your case and secure cross-functional support.

Audience: Executive leadership

Organizations that communicate clearly, consistently, and measurably are more agile, more aligned, and more trusted by their employees.

Right now, we face communication challenges that limit our ability to scale, engage, and retain top talent. ContactMonkey offers a secure, scalable solution that transforms internal emails into powerful engagement tools—equipping leadership with real-time insights into what's resonating across the organization.

This enables smarter decision-making, reducing risk during times of change, and strengthening the connective tissue that holds our business together. The ROI is clear: better retention, faster execution, and a stronger company culture that drives performance.

Recommendation: Endorse and invest in ContactMonkey as a strategic tool for enabling internal alignment, supporting organizational resilience, and driving measurable business outcomes.

Audience: Finance leaders

Internal communications may not always show up on a balance sheet, but its impact is felt across the business—from employee retention and productivity to reduced risk and operational efficiency. Investing in ContactMonkey enables measurable cost savings by reducing manual workload, streamlining processes, and lowering employee turnover.

With a minimal upfront investment, the organization stands to gain a 3–5x return through time savings, improved engagement, and reduced rehiring costs. ContactMonkey's built-in analytics also ensure that every communication is data-backed, enabling continuous ROI tracking.

Recommendation: Approve the purchase of ContactMonkey as a cost-effective, high-impact solution that supports financial discipline while enabling smarter, leaner internal operations.

Audience: IT leaders

The demand for seamless, scalable digital tools continues to grow—and internal communications must keep pace. ContactMonkey integrates directly into Microsoft Outlook and Gmail, meaning no new platforms to onboard and minimal IT involvement. It requires no additional infrastructure, no new login credentials, and can be centrally managed by approved users.

The platform meets enterprise-grade security standards, including SOC 2 compliance, and offers data encryption and access controls that align with our IT governance policies.

Recommendation: Support the deployment of ContactMonkey as a secure, low-maintenance solution that reduces shadow IT risks and enhances digital workplace capabilities—without adding to IT’s workload.

Audience: HR leaders

Clear communication is at the heart of employee engagement, trust, and retention—all top priorities for HR. ContactMonkey empowers HR and comms teams to send targeted, visually engaging emails, track their impact, and gather real-time feedback—all without relying on external tools or departments.

By improving how we reach and connect with employees, we create a more transparent, responsive, and inclusive workplace. The ability to measure engagement at the message level helps HR better understand employee sentiment, identify trends, and proactively address issues before they escalate.

Recommendation: Adopt ContactMonkey to strengthen the employee experience, support a culture of transparency, and give HR the tools to drive engagement and retention through smarter communication.



Presenting your business case to leadership? Download our **FREE Business Case for Internal Communications Software slide deck!** We've covered the ideal format, you just input your own copy!



ContactMonkey integrates with Outlook or Gmail to elevate the design, deployment, and data of your internal communications.

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