Quick Guide

7 Step Guide to Buying an Employee Engagement App

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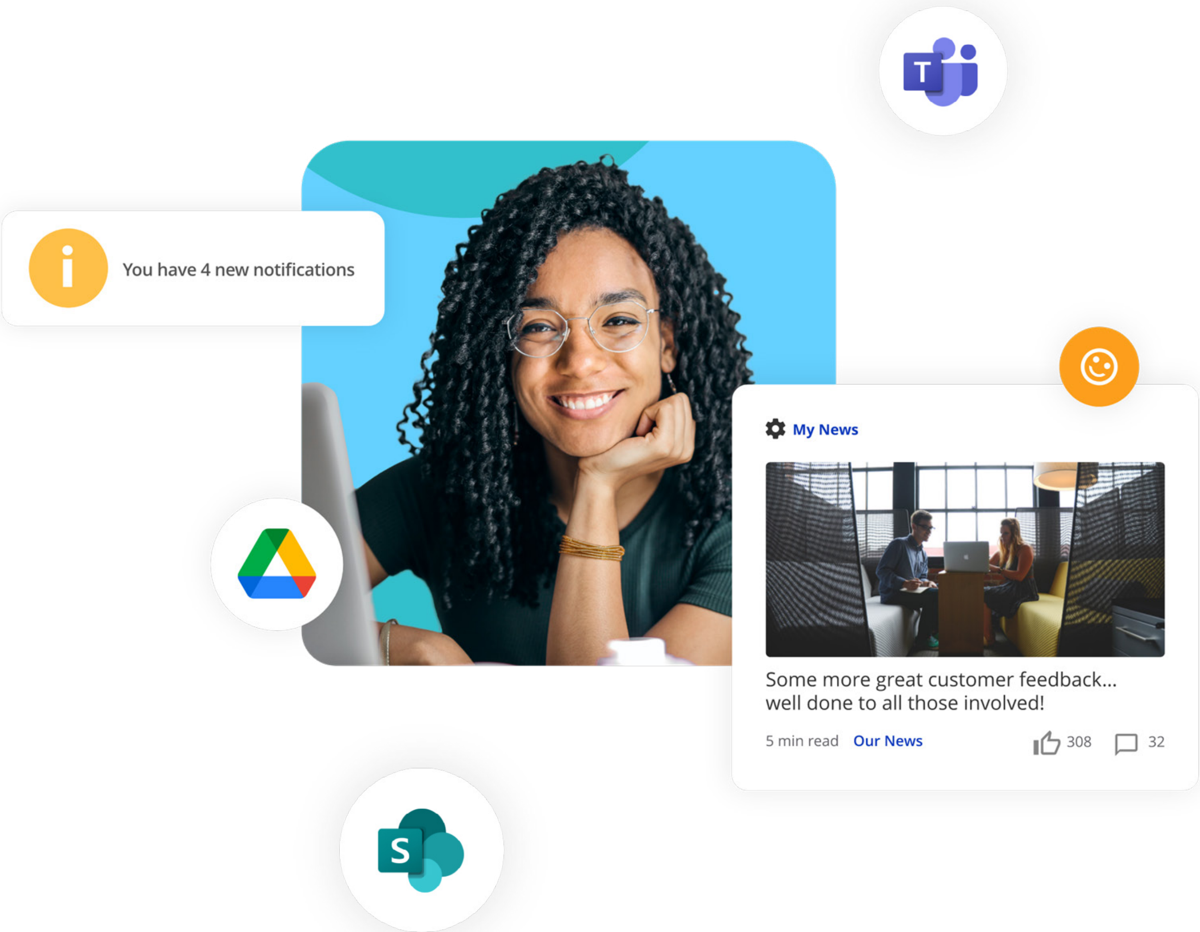
Introduction to Oak Engage

We are Oak Engage. An employee engagement platform and intranet solution that empowers you to reach every employee, every time. Our combined modern intranet, curated content and mobile solutions are a better way to engage and mobilise your employees.

Over our many years of experience in implementing solutions for global organisations of all sizes and industries, we tailor our approach to different customers based on their needs. We pride ourselves on our core values of being engaging, caring and innovative, nurturing our relationships with customers and prospects. This is what makes us so unique.



Understanding the Buying Process: Your Guide

Every organisation faces different challenges and has different requirements, which is why it's so important to be as informed as possible when entering into any sales process.

Especially in the purchase of a new system, which brings pressures of its own from all areas of the organisation,whether that be stakeholder buy-in or ROI.

That being said, each business will be in a different position. You may have no intranet or may even have a good intranet that just won't support the evolution of your goals . Our guide is a blueprint to understand your own situation and maximise the buying process to align with your needs.

By following this guide to buying an intranet, you will learn:

- How to identify your needs and goals
- Which stakeholders to include in which phases
- The buying schedule
- What happens next?

7-Step Guide to Buying an Intranet

Step 1: Identify your needs

Picture the scene; you are contacted by a representative of an intranet provider just at the moment you've been considering replatforming or implementing a new employee system. You need to make an informed decision to save time, money and meet your organisational goals.

What you need to do first:

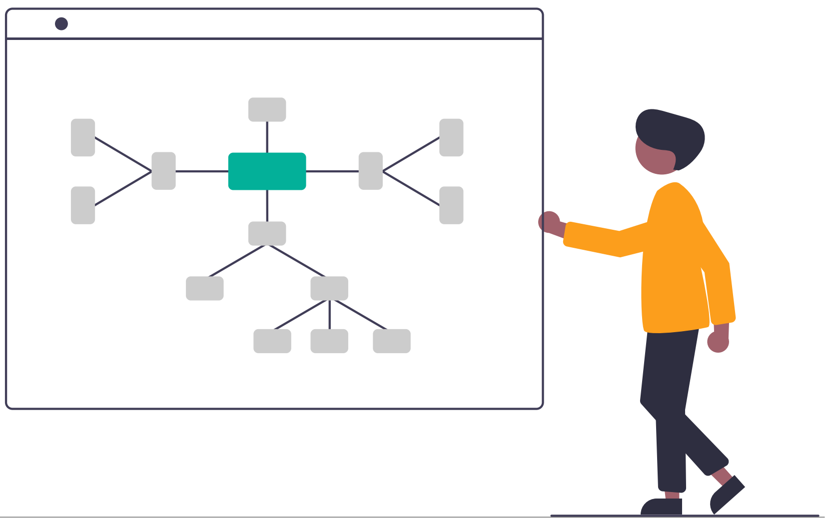
Think about what you like, dislike about your current system and what do you need from a new system

What are your organisational and internal communication objectives and what will get you from where you are now to where you want to be

Decide what would you might need to improve or change within the organisation

In addition to your own needs, it's important to get a view across the business to make a truly informed decision that will meet everyone's needs.

Mapping out pain points for specific internal stakeholders can help you determine objectives across departments. It may be useful to consult with the wider business at this early stage if needed.



Use the example table below to separate the issues for each stakeholder group.

Stakeholder	Pain Points
Communications	No way of measuring comms campaigns
IT	Limited capacity to provide support for all current systems Some employee's without access to current systems
Executives/Leadership	Low trust from employees in leadership
HR	Limited policy access for deskless workers
Marketing	Brand guidelines for external comms are unclear
Deskless workers	Regularly miss urgent notices regarding their shift patterns

Step 2: Define your Requirements

From Step 1 you know why you need an intranet. To get ensure the process goes as smoothly as possible you should define the following:

- Number of users/potential users - (The results of the below will be far more accurate if you do this)
- Who will sign off the project? Will it be yourself, or will you need wider approval?
- Timeframe/schedule/ go live date- According to your needs, so an implementation plan can be put in place to achieve this.
- Budget - establish how much budget you have available for the project
- You're now ready to have a fully-informed discovery call with the outreach representative you've been speaking to.

If You're Not Sure Where to Start...

Maybe you know you need an intranet, but you just find the whole process overwhelming. You would be surprised how many people are in the same boat.

We pride ourselves on building a rapport, so we will walk with you on your journey. We can listen to your queries and pinpoint exactly where we can help. You'll get advice on how to get the information from the previous section, without the obligation of a formal sales call.

Given the variety and size of our customer base, it is highly likely that we have encountered several issues or needs that you flag up in your call. You'll be sent some helpful customer references that you may be able to relate to and learn from.

Step 3: Discovery Call

Our first meeting will be a discovery call. This is key to understanding your issues and requirements, and of course answer any questions you might have about Oak or the process.

Some people like to include other stakeholders on the call to ensure an aligned vision. Don't worry if it's just you at this stage, there will be other phases where you can bring in the necessary departments.

Prior to the call we will send you an agenda so you know what to expect. It may differ from this, but the agenda of the call will generally be to gain a better understanding of:

- Your current situation as an organisation
- Your employee engagement methods
- What you require and what you need to move forward with the project

We will also give you a pricing estimate based on your user base, solutions, etc.

After the call we will send out any supporting material that will be relevant to you.

Step 4: Vision Call

We will organise a vision call with one of our sales team, you can include as many or as few stakeholders as you wish, but it may be helpful to create an aligned vision if you do.

On the vision call we will discuss the requirements outlined in your discovery call, so we can gain a greater understanding and map out appropriate Oak solutions based on them.

This is so we can shape an experience that is tailored to your needs and capabilities.

Step 5: Wider Business Meeting(s)

The next stage will involve bringing in members of your team, other departments and decision makers into the project.

This is where it is essential to include people from the wider business, such as IT, compliance and perhaps employees who will be using the system at ground level.

We will delve deeper into the requirements across the organisation, any concerns they may have and how we can address them in line with solution capabilities and budget.

These calls can also be done separately with different areas of the business if necessary.

We will also further discuss pricing and packaging options in-line with your requirements.

Step 6: Product Demo

After these conversations we will be in a position to create a demo site that we have tailored to your needs. You will be able to see all the functions and features of your potential bespoke site, branded to your requirements.

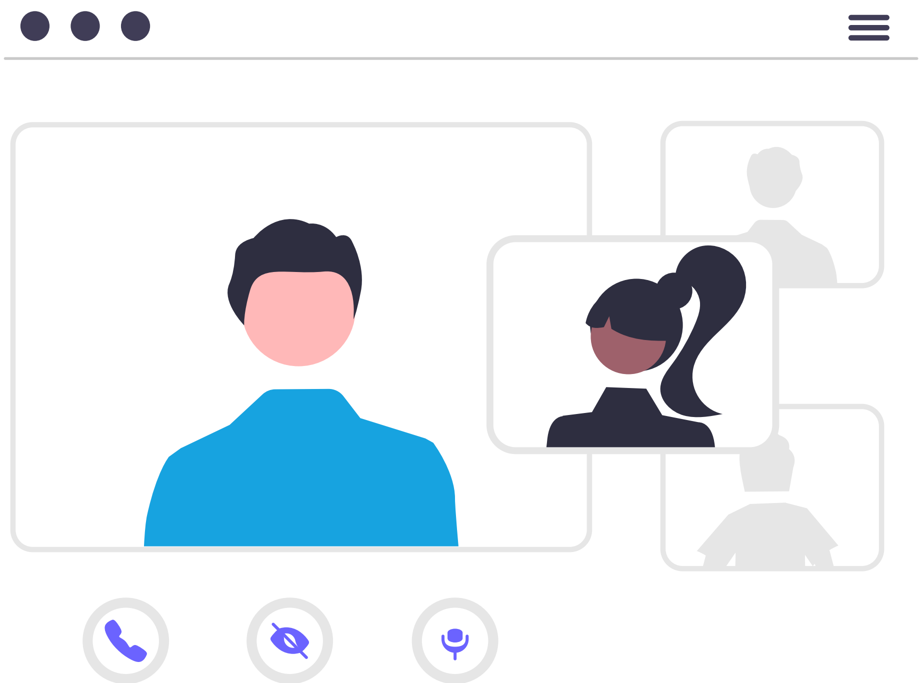
You will get an idea of how the site will look in action and feel to users from an immersive and interactive demonstration.

Again, bring any relevant stakeholders into the demo, which can help you to get buy-in if you wish to proceed.

Step 7: Follow Up

After you've had your demo and had a chance to talk it through with all the relevant people, we will schedule a follow up call to discuss the next steps.

Once an agreement has been made in principle, we will put together a bespoke plan, which can be in-line with your own business procedures if required. We do all the legwork for you!



If you're not in a position to make a decision or feel like you need to include more people from across the organisation, we can repeat any of the previous steps.

Need more help?