Quick Guide

7-step guide to buying an intranet

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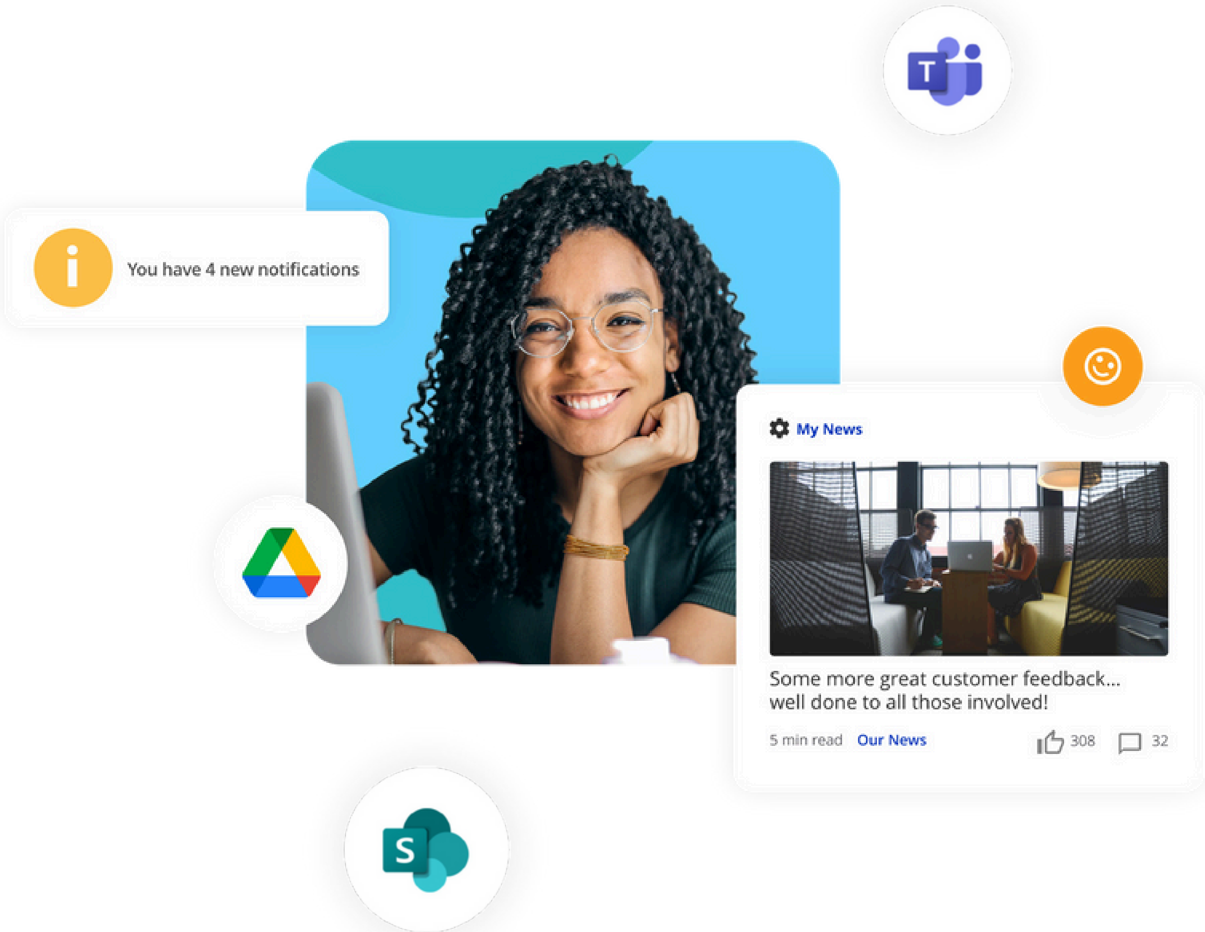
Introduction to Oak Engage

We are Oak Engage. An employee engagement platform and intranet solution that empowers you to reach every employee, every time. We transform how businesses work and communicate, wherever they are.

With many years of experience in implementing solutions for global organisations of all sizes and industries, we tailor our approach based on each customer's needs. We take pride in 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 varied requirements, which is why it's so important to be as informed as possible when entering into any sales process.

The purchase of a new system can bring pressures of its own from all areas of the organisation, from stakeholder buy-in to ROI. That being said, each business will be in a different position. You may have no intranet yet or may be looking for a new platform to 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 each phase
- The buying schedule
- What happens next

7-Step guide to buying an intranet

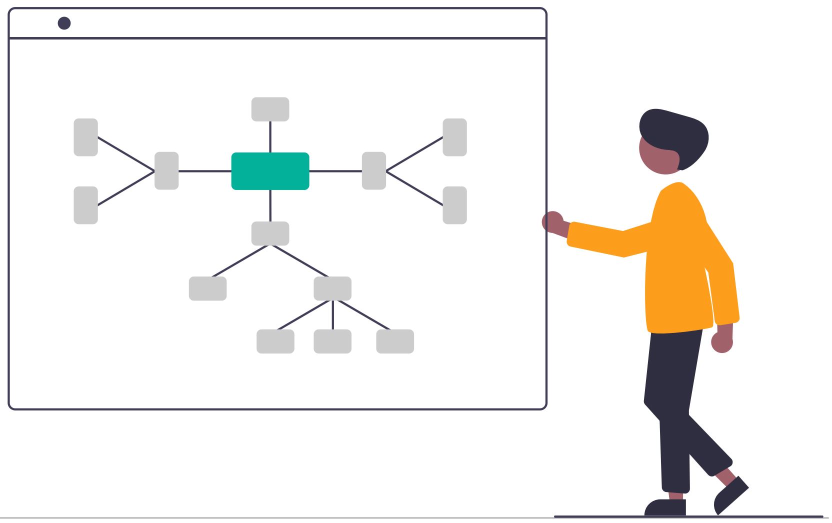
Step 1: Identify your needs

Picture the scene; you are contacted by a representative of an intranet provider just at the moment you've been considering re-platforming or implementing a new employee engagement 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 and dislike about your current system and what you require from a new one
- Consider your organisational and internal communication objectives and how you can achieve them
- Decide what you might need to improve or change within the organisation
- It's also important to get a view across the business to make a truly informed decision that will meet everyone's requirements

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 success of campaigns
IT	Limited capacity to provide support for all current systems Some employees don't have access to systems such as email
Executives/Leadership	Low trust from employees in leadership
HR	Limited policy access for deskless or frontline workers
Marketing	Brand guidelines for internal 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 ensure the process runs smoothly, you should define the following:

- Number of users/potential users: the below will be more accurate with this
- Who will sign off the project: will it be yourself, or will you need wider approval?
- Timeframe and go-live date: an implementation plan can be put in place according to your needs
- 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 are finding the whole process overwhelming. You would be surprised how many people are in the same boat. We'll take the time to understand your requirements and walk you through each step of your journey. We can listen to your queries and pinpoint exactly where we can help. You'll get advice on how to get the required information from internal stakeholders, 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 and overcome several issues or needs that you highlight on your call. We can also send helpful customer references and success stories 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, requirements and 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.

The agenda will generally help us to gain a better understanding of:

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

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

Following the call, we will send out any relevant supporting material.

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 have a small group to create an aligned vision.

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

This enables us to shape an experience that is tailored to your needs and capabilities.

Step 5: Wider business meeting

The next stage will involve bringing members of your team, other key 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 the wider team may have and how we can address them in line with solution capabilities and budget. These calls can 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

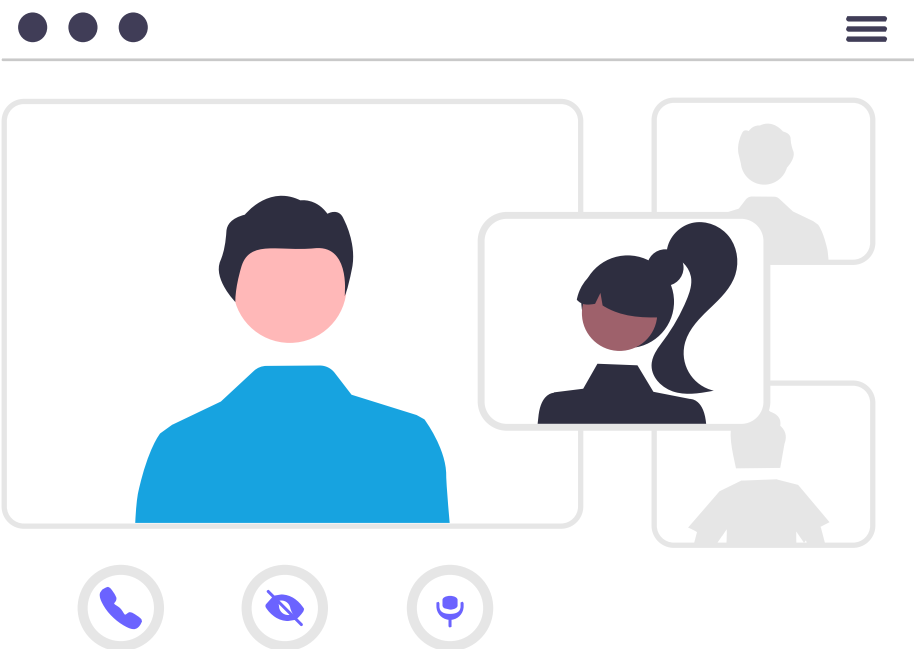
After these conversations, we will be in a position to create a demo site that is tailored to your needs. You will be able to see all the functions and features of your potential bespoke site, branded to your requirements.

You will get an idea of how the site will look 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 debrief and discuss with the relevant people in your organisation, 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 yet 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?