

worktango

Buyer's Guide

# **EMPLOYEE EXPERIENCE PLATFORM**



**So, you're looking for a solution to manage your employee experience. It's a big undertaking — and we're here to help.**

### What is the employee experience?

The employee experience is an employee's total experience at your organization. It encompasses every point from onboarding to exit, including career growth, productivity, company culture, and relationships with peers, managers, and leadership. In short, your employee experience is everything. Which is why it's critical to find the solution that supports your company's needs, vision, and employees.

### What can an employee experience platform do for you?

An employee experience platform brings each of the integral pieces of the employee experience — including individual goals and business OKRs (objectives and key results), employee recognition, feedback, performance conversations, and incentives — into one place. With all these elements in conversation together, your workforce becomes aligned and connected. And you have radical transparency into the result.

**Our guide walks you through the key questions you should ask at every step of your consideration process so you can confidently choose the employee experience platform that best serves your organization.**

1. PRE-PLANNING	2. EVALUATING OPTIONS	3. DECISION & PURCHASE
Outline current challenges and goals for changing your process	Use our detailed question lists to find the features you need	Use our checklist to make the right choice

# Pre-planning: What to do before beginning your search

The employee experience at each organization is unique, with its own needs and challenges. Before you evaluate solutions, it's important to understand the challenges you currently face in your employee experience, and what your desired outcomes are for your new system.

**Download our worksheet to outline:**

## PRE-EVALUATION CHECK

What challenges does your company currently face? What are you currently doing well?

### Including:

- Are your employees routinely setting and meeting goals?
- Do you feel confident everyone is working on the right things?
- Are your performance appraisals effective?
- And more

# Evaluating options: Vendor and business fit

With your goals and needs clear in your mind, it's time to evaluate solutions. We've compiled a detailed list of questions to ask vendors to help you confidently choose the right platform.

## Questions about the vendor

Remember, this isn't just a one-time transaction: The vendor you select will be your employee experience partner through onboarding and beyond. They should not only provide an easy-to-use platform, but also help with program design, collaborate with your internal teams about change management, and offer ongoing support to refine your program over time.











### ASK

- How will you help support my organization's unique mission, vision, and goals?
- How will you help us prioritize our employee experience?
- What is your point of view on performance management (which we at WorkTango approach as Employee Success). How do you support employee performance programs and processes?
- What is your internal adoption rate of your platform?
- How do you use it internally?
- How many customers do you have, and what is their average tenure?
- What is your customer retention rate?
- In what ways do you enable your customers to learn and share best practices from each other?
- How do you measure, monitor, and ensure customer satisfaction?
- What makes you stand apart from your competitors?

# Evaluating options: Platform and features

## Questions about the platform and features

Your pre-planning worksheet helped you identify the metrics you want to change: Now it's time to dig into the functionality of the solutions that will help you get there.

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# Evaluating options: Platform and features



## REWARDS

### Why it matters

Employees who feel their organization's rewards meet their needs are 7x as likely to be engaged as those who don't. Use a strong rewards program to drive employee engagement.

**What you're looking for**  
A robust, customizable rewards catalog with no hidden markups or penalties.

### ASK

- Do your rewards have markup? If so, are they at or above cost?
- What sort of variety is included in your rewards offerings? (e.g., gift cards, experiences, donations, products, etc.)
- How can rewards be customized to fit my organization's values and culture? (e.g., team rewards, local merchants, mentoring, etc.)
- Does your platform support service awards and other milestones?

# Evaluating options: Platform and features



## INDIVIDUAL GOALS & BUSINESS OKRS

### Why it matters

Transparent organization-wide goals — and individual goals that clearly support them — are key to aligning and driving your business.

### What you're looking for

A goal process that is intuitive and easy to use, and offers transparency and tracking across all levels.

### ASK

- How many steps does it take for an employee to set and update a goal in real time?
- What visibility do employees have into company goals, peer goals, and team goal progress?
- How does your platform enable HR executives to track organizational and individual goals over time?
- What is the process for approving new goals? Closing completed goals?

# Evaluating options: Platform and features



## CONVERSATIONS (Check-Ins and 1-on-1 Sync Ups)

### Why it matters

Performance conversations are key to coaching and connection — you want a platform that facilitates them to help you boost employee engagement.

### What you're looking for

A flexible, easy-to-use solution for managers and employees that allows scheduling, review, and access to past Check-In and Sync-Up notes.

### ASK

- What types of performance conversations does your platform support? How are they distinct? How would you use each one?
- Describe the process for requesting/completing a one-on-one Sync-Up.
- Can managers access past Sync-Up notes?
- How have your customers used performance reviews (Check-Ins) to improve employee performance?



# Evaluating options: Platform and features



## FEEDBACK

### Why it matters

Feedback is key to employee development and establishing a company-wide growth mindset.

### What you're looking for

Make sure the vendor's feedback feature is easy and appealing to use, and the feedback itself is actionable and stored for appropriate use.

### ASK

- Describe the process for requesting feedback in your platform.
- Who can see feedback given in the platform?
- How does your platform encourage or promote feedback requests?
- Can managers access past feedback notes in performance reviews?
- What kind of feedback options does your platform support? (e.g. Start, Stop, Continue, Feed Forward, Strengths & Opportunities, Surveys & Insights, etc.)

# Evaluating options: Platform and features



## INCENTIVES & GAMIFICATION

### Why it matters

A platform is only as effective as its adoption rate. Ask your vendor what options they have to drive desired employee behaviors and get the most out of their platform.

### What you're looking for

A simple, appealing system that allows employees to earn points, badges, or other incentives for activities like staying healthy, completing surveys, and more.

### ASK

- Do you offer any incentives, behavior boosts, or other gamification?
- Describe the process for creating an incentive for employees who complete safety training.
- Describe the process for the employee redeeming that incentive.
- How do your incentives support adoption of your platform?

# Evaluating options: Platform and features



## EMPLOYEE SURVEYS

### Why it matters

Engagement surveys are key to learning what's happening on the ground for your employees — and either fixing or celebrating it.

### What you're looking for

Customizable survey options with clear insights reporting and the ability to store responses over time.

### ASK

- What kind of surveys do you offer?
- Are your surveys scientifically validated?
- Describe the process for creating and sending a custom questionnaire.
- How do your customers gain insights from responses to your survey tool?
- Does your platform allow admins to store and track survey responses over time?

# Evaluating options: Platform and features



## INSIGHTS & REPORTING

### Why it matters

You can't measure what you can't track. You're investing in your employee experience — it's critical to know how and where you're moving the needle.

### What you're looking for

Look for dashboards that allow for easy tracking and actionable insights.

### ASK

- What reporting capabilities are available in your system?
- Does your platform allow admins to share reports across the organization?
- What sort of visualization of data and insights does your platform offer?
- How do insights from different features correlate together?
- How can a customer track overall usage of the platform?

# Evaluating options: Platform and features



## CONFIGURABILITY

### Why it matters

Your EX solutions should fit your organization — not the other way around. Your company's culture and needs are unique, so make sure you can customize your platform accordingly.

### What you're looking for

The ability to make the platform your own — and reflect your company culture, brand, language, and values.

### ASK

- What options exist to change the platform visually (colors, logo, etc.) to reflect our organization's visual brand?
- What options exist to change the names of specific features or elements in the platform?
- Does your platform allow for modular addition of features and functionality?
- Does your platform include widgets?

# Evaluating options: Platform and features



## INTEGRATIONS

### Why it matters

You've invested in your existing solutions already (and your employees are comfortable using them). Your new tool should work with and empower your existing ones, rather than conflict and slow things down.

### What you're looking for

The platform can easily integrate with your existing solutions and software.

### ASK

- What products does your technology integrate with?
- Which integrations do you plan to add in the future?
- Which data is important for your company to see across your technology stack?
- How does your company select its API integrations?
- How do you keep your customers' information secure?

# Evaluating options: Platform and features



## QUESTIONS ABOUT SUPPORT

### Why it matters

Whether you go for something simple or for all the bells and whistles, a platform is only useful if you know how to use it.

Get the most out of your investment: Ensure that your vendor of choice offers clear implementation and ongoing support.

### ASK

- What change management support can I expect during the onboarding experience? After?
- What are the greatest challenges your customers experience during and post-launch, and how do you support them?
- How do you set your customers up for success using your platform?
- What educational resources do you offer customers for using and getting the most out of your platform?
- What internal adoption rate do your customers see post-launch?

# Decision and purchase: Time to make the right choice

**Have you narrowed it down to a few great options? Fantastic.**

**Run through our checklist before you commit:**

- Make sure pricing is transparent — you know exactly what you're spending, and why
- Look for positive customer testimonials, case studies, and awards
- Ensure your vendor of choice is a long-term partner who offers valuable analytics and ongoing coaching/guidance
- Make sure you have internal buy-in from movers and shakers key to adoption
- Good to go.



**We believe companies flourish when their employees are both inspired and aligned. This only happens when employees have opportunities for performance and growth in the work itself, and feel appreciated by and connected to their colleagues and company.**

To achieve this, companies need to turn outdated approaches to performance management, recognition, and engagement on their heads. They need to adopt a new way that's continuous and people-first.

We believe this vision is not just possible — it's critical to the future of work. And, it's made possible by WorkTango.