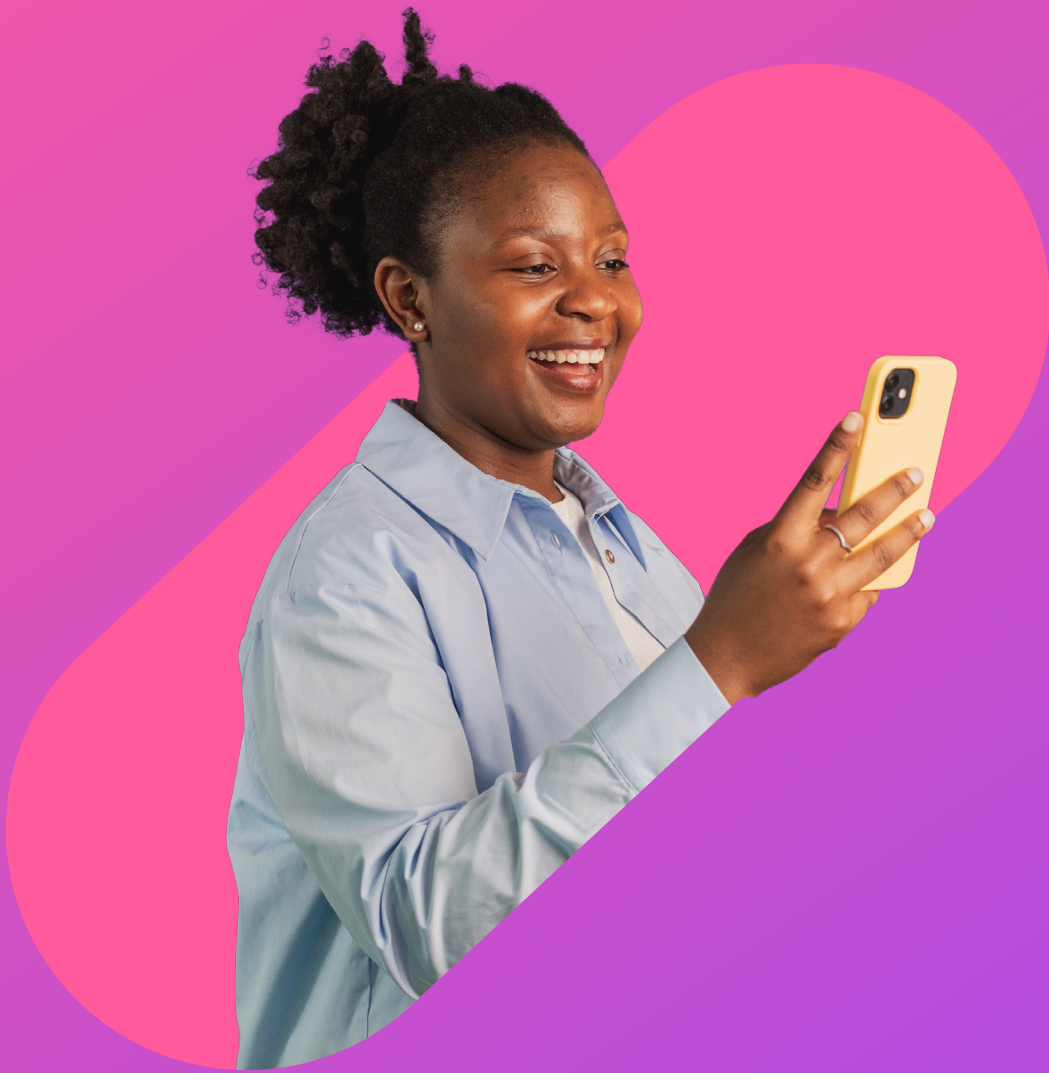




workvivo
by zoom



The Employee Experience Platform Migration Toolkit

Every Workvivo migration worksheet,
template and checklist, all in one place.



WHAT'S INSIDE?

1. Intranet Requirements Checklist
2. Qs to ask potential vendors
3. Building your Request for Proposals (RFP)
4. Building an Internal Comms and Change Management Plan
5. Building your Content Migration Plan
6. Building your migration taskforce
7. Tracking your EXP's Return on Investment (ROI)





1

EXP Requirements Checklist

What are the basic elements your new intranet or EXP should have? It can be tricky to know what 'baseline' looks like. Here's a handy checklist to help you keep track of the must-haves.



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1 General requirements

- ☐ **User-friendly interface.** Ensure the EXP is intuitive and easy to navigate for all users. This includes clear menus, simple layouts, and accessible design elements that reduce the learning curve.
- ☐ **Mobile accessibility.** The EXP must be accessible on mobile devices, providing a responsive design that adapts to different screen sizes for on-the-go access.
- ☐ **Scalability + flexibility.** The EXP should easily scale with the organization's growth and allow flexibility in features and user numbers without performance degradation.

2 Technical requirements

- ☐ **Integration with existing systems.** The intranet should seamlessly integrate with existing platforms (like CRM, ERP, or HR systems) to enhance workflow efficiencies.
- ☐ **Security features and compliance.** Must include robust security protocols, such as encryption and multi-factor authentication, and comply with relevant data protection regulations (e.g., GDPR, HIPAA).
- ☐ **Customization capabilities.** Ability to customize features and interfaces according to specific organizational needs and preferences.

3 Content management

- ☐ **Easy content creation and management.** Users should be able to create, edit, and manage content without needing technical expertise. This includes intuitive content editors and templates.
- ☐ **Document storage and sharing.** The intranet should provide secure and efficient document storage solutions with version control, easy retrieval, and sharing capabilities.
- ☐ **Search functionality.** Powerful search tools that enable users to quickly find documents and content within the intranet.

4 Communication tools

- ☐ **Messaging + chat features.** Real-time communication tools, such as instant messaging and chat, can enhance team collaboration and reduce email dependency.
- ☐ **Forums + discussion boards.** Platforms within the intranet for hosting forums and discussion boards to foster community and shared learning.
- ☐ **News + announcement sections.** Dedicated areas for company news, updates, and announcements keep everyone informed and engaged with organizational developments.

5 Collaboration tools

- ☐ **Project management features.** Integrated tools to plan, execute, and track projects within the intranet.
- ☐ **Task tracking + workflows.** Systems to assign, track, and manage tasks efficiently with capabilities to create custom workflows.
- ☐ **Team spaces + collaboration areas.** Designated spaces that allow teams to collaborate effectively, share resources, and maintain project-related discussions and files.

6 User support

- ☐ **Training + onboarding resources.** Comprehensive resources, such as tutorials, guides, and videos, to assist users in understanding and utilizing the intranet effectively. Integrated support tools, such as helpdesks and FAQs, provide users with assistance and troubleshooting options.
- ☐ **User feedback mechanisms.** Tools to collect and analyze user feedback on intranet usage and satisfaction to guide continuous improvement.



2

Qs to ask potential vendors

To make migration as smooth and stress-free as possible, you're going to want to feel confident that your chosen vendor is truly a match. Otherwise, you could be in for nasty surprises down the line. Here are the questions we recommend quizzing potential partners with!



THE BIG FAT MIGRATION QUIZ

STILL CAN'T
DECIDE?

Need a little extra help with your decision? Take the quiz!

LET'S GO

Is your potential vendor Meta's
only official migration partner?

NO

YES

Was the vendor's migration tool
developed by a non-Meta third-party?

NO

YES

Does the vendor charge
for the migration?

NO

YES

How long will it take the vendor to
import your data into their platform?

- 1 DAY

WEEKS +

What's the biggest migration the
vendor has handled to date?

< 50K EMPLOYEES

> 50K EMPLOYEES

WARNING!

Scalability and robustness
questionable. Be wary..

Can the vendor share testimonials of
at least 10 satisfied customers that
have successfully migrated?

NO

YES

UH OH



The migration process is
unproven. Take caution.

BINGO!!!



workvivo is your perfect match!
by zoom

- Official migration tool co-developed with Meta
- Free migration with zero hidden costs
- Track record of migrating large enterprises with ease
- Migration complete in just 1 day



3

Request for Proposals (RFP)

This RFP is your project's foundation, and you're going to be strategic about it. Dedicate time to be sure you identify the ideal vendor that aligns with your distinct needs and goals.

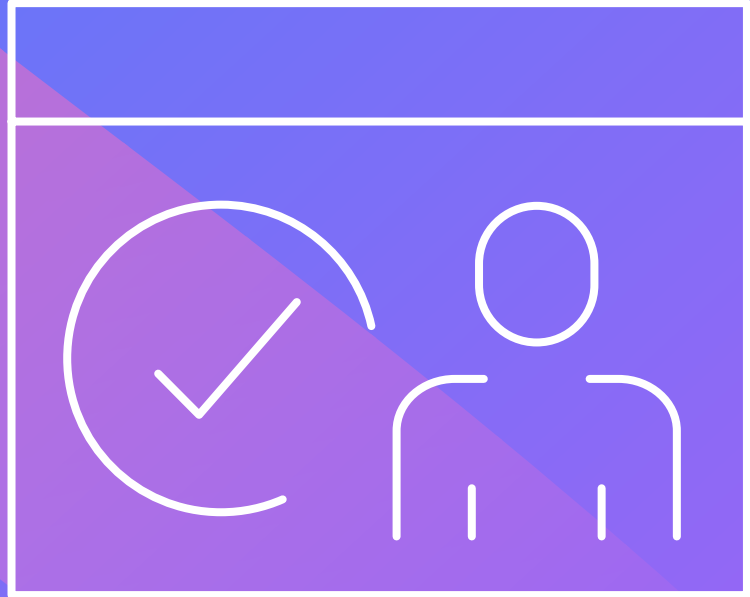


Sample Request-for-Proposals (RFP) Template

Use this sample to inform your own RFP design, or download and edit it for extra convenience!

Section		Points to consider
1	Executive Summary	
2	Company Background	
3	Project Scope & Objectives	
4	Detailed Requirements	
5	Implementation & Support	

Section		Points to consider
6	Budget & Pricing	
7	Evaluation Criteria	
8	Vendor Qualifications	
9	Legal & Compliance Requirements	
10	Timeline	
11	Principal Point of Contact	
12	Submission Requirements	



4

Internal Comms and Change Management Plan

To get your migration right and reap the full benefits, it's essential you build a robust internal communications and change management plan.



(Sample) EXP Migration Internal Communications & Change Management Plan

1 Be clear on your business objectives

A crystal-clear business rationale for your EXP migration serves as the foundation for your communications and change management plan. Objectives could include:

- Improve productivity
- Increase employee engagement and satisfaction with workplace technology
- Reduce IT costs

Your objectives will be specific to your organization. Being clear on your 'why' gives you an anchor point to refer to for all your messaging, communications, and change management.

3 Agree on your key messages

Your key messages need to cover both the business reasons for the change, and the people side of it. The business messages should be drafted at the start and remain consistent throughout, while your people messages will be tailored to your audience and will evolve as more is discovered about impacts and benefits.

- **Business messages** – for example, what are we doing, why are we doing it, and why are we doing it now?
- **People messages** – to answer the questions, what does it mean for me? (impact) and what's in it for me? (benefits)

Agreeing your key messages with your Project Sponsor and Team will make your communications more efficient and effective, saving you precious time on drafting and approvals.

5 Do a change impact assessment

Once you've mapped your stakeholders and determined their level of influence and the impact of the change on them, the next step is to assess this impact in more detail. Here you want to be looking at:

- **Impact level** – high, medium, low
- **Anticipated resistance** – high, medium, low
- **Anticipated advocacy** – high, medium, low

From this, you can use a simple scoring system to work out the degree of change management that will need to be involved, and therefore what the purpose of communications to these groups should be.

7 Keep training and communications simple

Adoption of the new EXP platform will hinge on the quality of your training and the simplicity of your communications. Put yourself in your people's shoes and ask:

- What do we really need them to do? Is this clear?
- Have we provided training that is quick, easy, and user-friendly?
- Are we offering training that is asynchronous?

With our ever-busier work lives, it's imperative that you meet your people where they are, make your migration seamless for them, and be there to help them when they need it.

9 Provide an information hub and forum for feedback

With any change, there will be questions you haven't anticipated and communications that people don't receive, understand, or pay attention to. That's only natural, so you need to:

- Create a channel where people can find information – FAQs etc.
- Enable employees to ask questions, voice concerns, and talk about how the change is impacting them

A simple, streamlined EX app like Workvivo is ideal in such cases, as it has built-in social features where people can share how they're feeling, stories, and support each other.

2 Build a business-aligned internal communications and change management plan

Your internal communications and change management plan needs to support the delivery of your business objectives. As such, you need to consider:

- What are your key messages?
- What impact will the change have on your people?
- What is in it for them – the benefits?
- Which channels will best engage your various stakeholders and audiences?
- Determine roles and responsibilities between EXP Migration Sponsor, Programme/Project Director, and the comms and change management teams

Putting the time and effort in to build a comprehensive plan will provide clarity, engender confidence, and enable you to stay on track.

4 Map your stakeholders

Identifying your stakeholders is one part of the plan. The next is to start categorizing them according to:

- What do you need them to do?
- What level of influence do they have?
- What level of impact will the change have on them?

Once you have this map, you can determine your appropriate change management and communications effort. For example, those with a high level of influence who are significantly impacted by the change will need to be involved regularly, including face-to-face, to ensure they understand the change, act as allies, and promote it within their area of the business.

6 Create a network of change champions and change agents

Change champions are committed to the change and will help you drive it forward. Change agents are those who are responsible for implementation, for example training.

- **For change agents** – choose these people on attitude vs. ability. Look for natural networkers, people who welcome new ideas, and those with influence and gravitas
- **For change champions** – identify people who are quick learners, excellent communicators, and with experience of advocating for change

Your network is going to be vital to your success, so choose wisely, involve them early on so they can input into your plan, and have a forum to keep them engaged.

8 Can you make it fun?

Employee experience apps should be fun, so use your migration as an opportunity to involve your people, pilot creative ideas, and show a different side to your organization. How could you do it?

- Run a competition to name your platform
- Give out prizes for adoption
- Reward high engagers

If your migration is handled thoughtfully, and with a bit of fun thrown in, it will really help your change to stick.

10 Keep up the momentum

Many change management programs run out of steam because the business loses interest, is impatient with a perceived lack of progress, or simply moves on to the next project. But to truly embed an EXP migration, you need to:

- Commit to it over the long-term
- Dedicate ongoing resources to ensure it maintains momentum
- Communicate, communicate, communicate – people need to hear the same message many times before it sinks in

Employee apps can help with this, by enabling you to keep employees up to date through push notifications, curated news, and showcasing stories.



5

Content Migration Plan

Using this checklist can help guide you through the process of creating a content migration plan that fully considers your needs, available resources, and internal and external deadlines – while also helping you identify the best solution available to support your goals.



Checklist: Building Your Content Migration Plan

Successful migration to a new EXP or employee app relies largely on planning and strategy. Using this checklist can help guide you through the process of creating a content migration plan that fully considers your needs, available resources, and internal and external deadlines – while also helping you identify the best solution available to support your goals.

Assess your needs:

- ✓ Outline worker types and accessibility requirements
- ✓ Consider security needs and vendor capabilities and certifications
- ✓ Evaluate the available customer support (types, availability, response times, etc)
- ✓ Get clarity around your budget
- ✓ Peruse user reviews and customer case studies
- ✓ Look at personalization options and features
- ✓ Learn about integrations available for your other systems

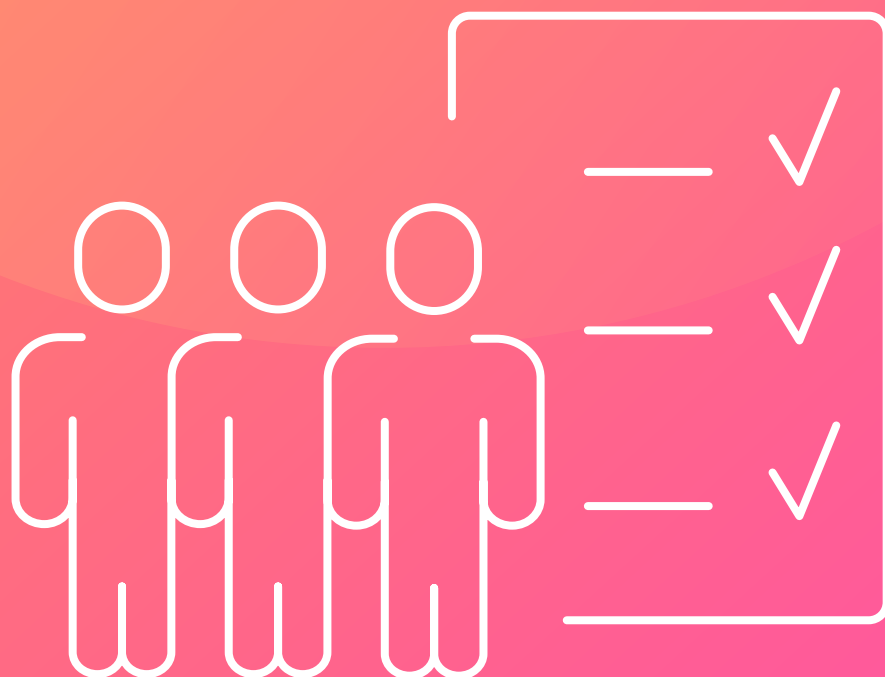
Using this criteria, evaluate potential vendors carefully and look for a partner who offers industry expertise and experience to help guide you through your migration process.

Steps to include in your migration strategy:

- ✓ Evaluate current content inventory
- ✓ Perform a content audit
- ✓ Identify opportunities to update/improve content, make more user-friendly
- ✓ Create a vision or wishlist for your new EXP
- ✓ Form a task force to perform content migration
- ✓ Keep track of migration progress (find a spreadsheet lover and put them in charge of this)
- ✓ Proofread all content assets during migration
- ✓ Launch to employees!

Launch steps to consider:

- ✓ Before migration, let employees know a new EXP is coming soon
- ✓ Before migration, poll employees about desired content for the new EXP
- ✓ After migration, host informational sessions/trainings as needed to introduce employees to new EXP
- ✓ After migration, make it easy for employees to get assistance with EXP if needed (e.g. designate a support person or email)



6

Building your taskforce



Checklist: Building your taskforce

Nobody chooses, onboards, implements, and rolls out a new EXP alone. What your taskforce looks like will vary depending on the size and structure of your business, as well as the number of external partners you need to involve. The only way to create the best team for your organization is to take your unique needs and resources into consideration. It can be helpful to refer to the migration steps and migration checklist we've shared before to determine who the best people are for each task in the process.

✓ HR reps

Whatever you call your frontline HR folks – generalists, coordinators, business partners, etc – you'll need to [tap a number of them](#) to inventory and audit your current content in preparation for migration.

✓ HR managers

Once HR reps have created (in a spreadsheet, say) an inventory of current content, HR managers can help identify opportunities for updates and additions, assign those tasks to HR reps, and oversee completion of those tasks.

✓ IT support

Implementing any new software solution needs guidance from your IT team. Ask your IT leader to assign one or more IT reps who can weigh in on system requirements, security issues, and integrations. (If you're integrating third-party solutions into your EXP, you might need some support from those folks but generally they don't actually need to be part of your migration taskforce.)

✓ Internal comms support

A big part of a successful migration relies on educating employees about the change and providing resources and training to help them use the new platform. Working with your internal comms team, you'll want to create a change management plan and, most likely, you'll need their help getting the word out.

✓ C-Suite buy-in

You may not need someone from your executive leadership team to take on any tangible actions in implementing your new EXP, but having their [support and buy-in](#) is key. You'll need them to sign off on the decision to move to a new EXP in any case, so their backing is crucial from the outset. But you'll also need them on board to help get the rest of the organization excited about the new platform, and to keep engaging with it long-term.

✓ EXP partner

Last but certainly not least, your new EXP provider will be a big part of your migration taskforce. Likely, you'll work with a number of different people during the process, including your account executive and other implementation experts. These are the folks who can guide you through the process, and they should be able to answer all your questions and interact with other members of your migration taskforce for a successful rollout. The right partner will be with you for the long haul, arming you with tips and tricks for a great launch, sharing ways to keep people engaged, simplifying leadership engagement, and much more.

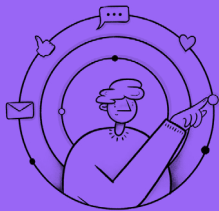



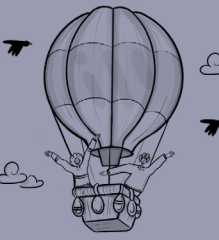



7

Tracking EXP ROI

The KPIs you choose will vary depending on your objectives, so getting them right from the outset is essential. Here's what to focus on so that your EXP's return-on-investment is clear and easy to report back to the C-Suite.



Goal	Metric	Insight	How to Measure
 Employee Engagement	Active Users	Shows adoption and interest	Track unique users logging in daily, weekly, or monthly through intranet analytics tools.
	Content Engagement	Measures content interaction	Monitor page views, downloads, and time spent on specific content using analytics dashboards.
	Social Interaction	Helps gauge community and engagement	Track likes, comments, and shares on intranet posts to assess engagement levels.
 Communication & Collaboration	Internal Messaging	Indicates efficiency of communication	Compare the volume of internal messages exchanged through the intranet platform to email usage.
	File Sharing	Shows the level of collaboration and knowledge sharing	Track the number of files uploaded, downloaded, and shared within the intranet.
	Teamwork Features	Helps assess the impact on teamwork and unity.	Analyze usage of workspaces, task management tools, and collaborative document editing features.
 Productivity & Efficiency	Time Saved	Highlights efficiency gains	Conduct employee surveys to understand how information access and communication improvements impact project timelines and working hours.
	Project Completion Rates	Measures project management improvements	Track project timelines and completion rates to identify efficiency gains.
	Help Desk Tickets	Reviews impact on self-service capabilities	Analyze trends in help desk tickets related to information access or technical issues — a decrease suggests the intranet knowledge base is driving better self-service.
 Cost Savings	Reduced Turnover Costs	Highlights savings from lower employee turnover	Compare employee turnover rates before and after intranet implementation.
	Lower Administrative Costs	Indicates reduction in operational expenses	Measure reductions in paper, printing, and administrative costs after moving processes to the intranet.
	Decreased Training Costs	Shows savings from streamlining training on the intranet	Compare training costs before and after using the intranet for onboarding and training purposes.
 Organizational Objectives	Employee Satisfaction	Measures overall employee happiness	Use employee satisfaction surveys to gauge employees' sentiment about their jobs and the intranet.
	Employee Turnover Rates	Indicates employee retention	Measure employee turnover rates before and after intranet implementation to identify retention improvements.
	Advocacy	Measures employee support for the company and brand	Track the number of shares on social media and blog articles created by employees, and consider survey results.
 Content Management	Information Accessibility	Assesses ease of finding information	Analyze search queries and success rates to understand how effectively employees can find information.
	Content Freshness	Measures how current and relevant content is on the intranet	Regularly audit content for relevance and accuracy; track updates and remove outdated information.
	User-Generated Content	Reflects employee engagement in content creation	Track the number of content pieces created by employees and their interactions, such as views and shares.

Meta's ONLY official migration partner

Don't waste valuable resources on risky alternatives. Choose Meta's official migration partner for a seamless transition — no data loss, no extra work, and no surprises.

www.workvivo.com/workplace



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