



TIPS &  
TRICKS

THE ULTIMATE GUIDE TO

# Migrating

EXP





Internal Communicators aren't from Mars, and EXPs aren't from Venus. In fact, they work together incredibly well. Here's how to leverage the former to successfully navigate the latter – and you don't even need to install Tinder!



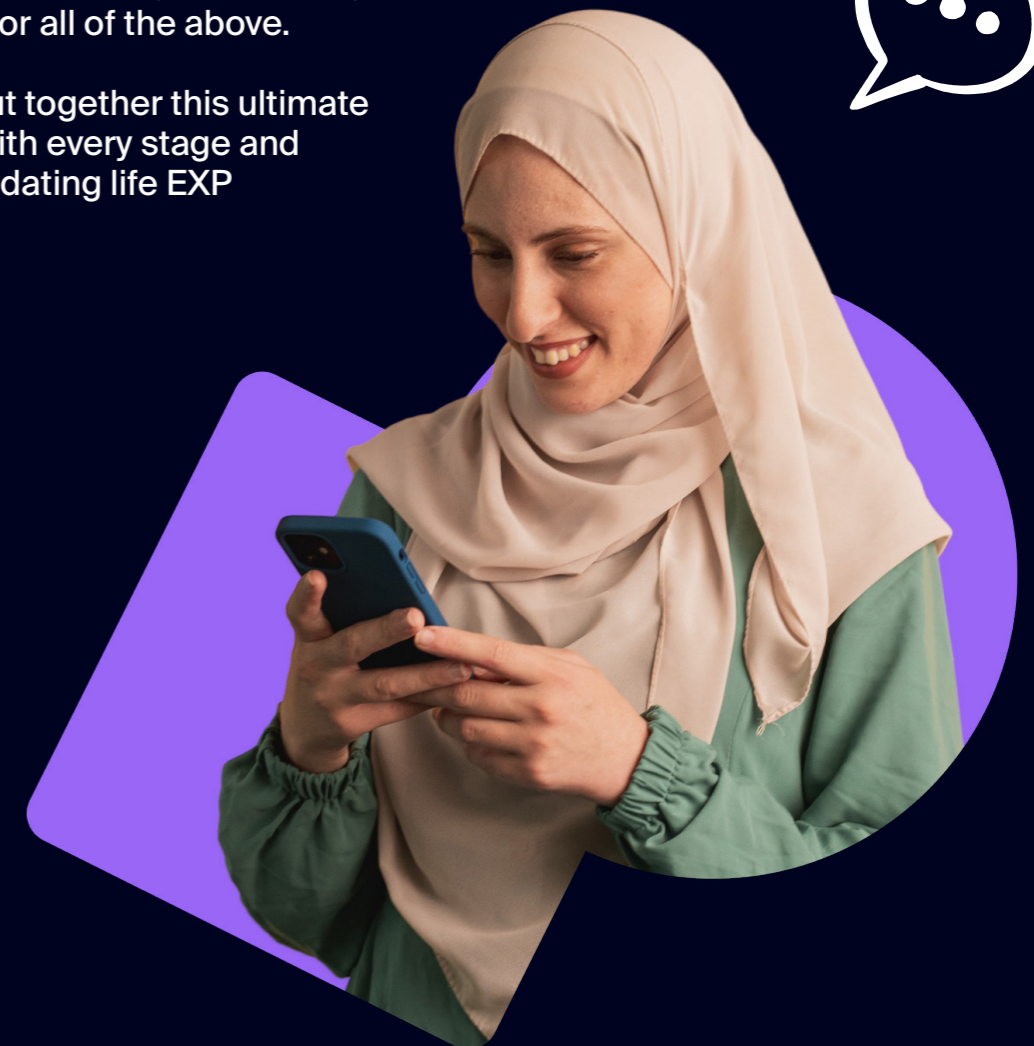
## HEY THERE!

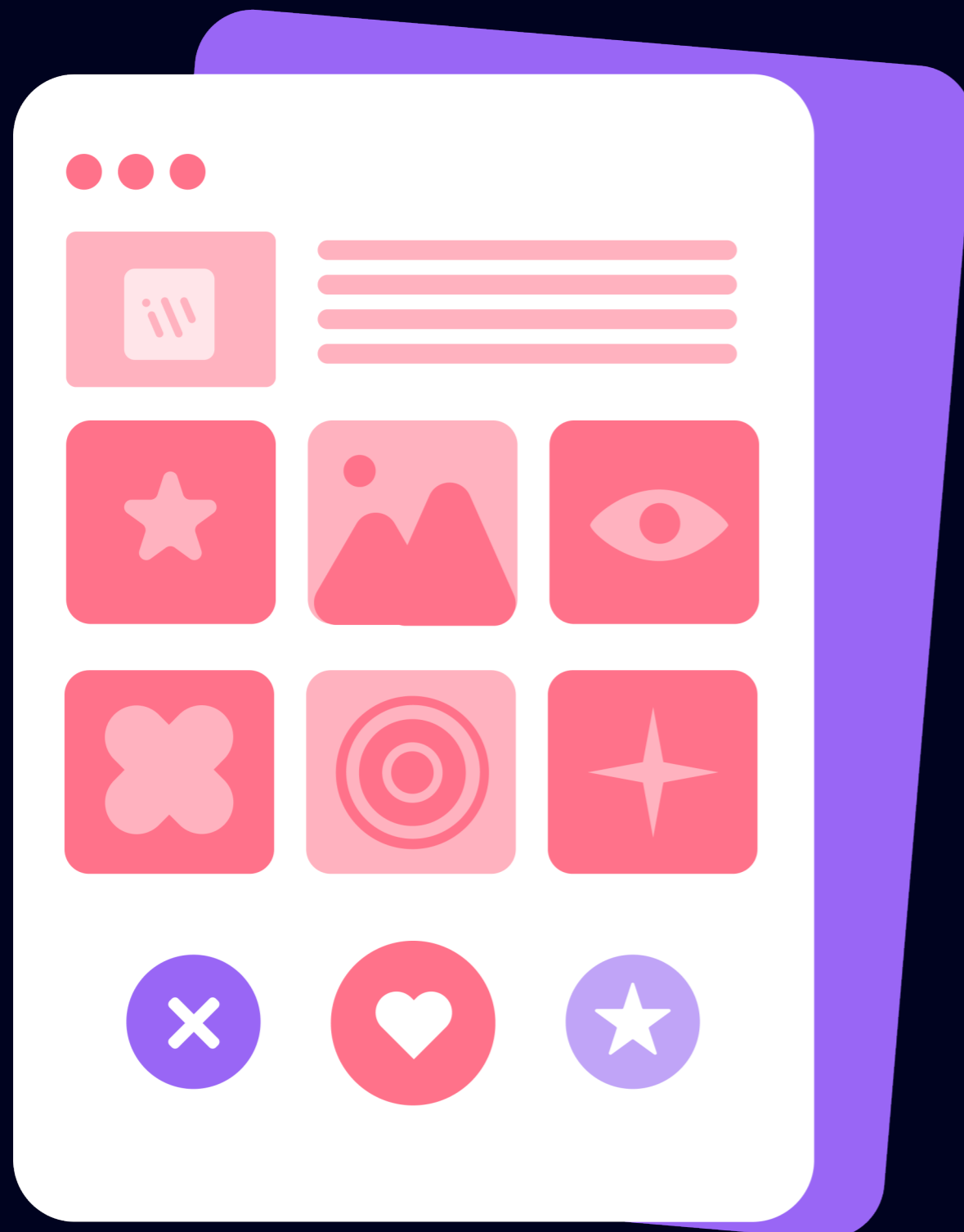
So, you're putting yourself out there and migrating.

You've arrived at a point where you have to move everything on your employee app – aka your intranet or employee experience platform (EXP) – to a new home.

It can be a roller coaster, we get it: you may be feeling apprehension, excitement, stress, confusion... or all of the above.

Thankfully, we've put together this ultimate guide to help you with every stage and every angle of your dating life EXP migration process!





# Getting started: Building your dating profile

Before you set sail on this journey, you need to set some ground rules. The simplest and most effective way to do this is through a Request for Proposals (RFP) document.

Treat your RFP as your EXP dating profile, and include things like...

- Basic information about you.
- Clear info on what you're looking for in a potential match
- A corny pick-up line to entice engagement [optional]

As IC expert Dafna Arad describes it, finding the right EXP is a little like “planning a wedding – only for software”.

“You’re working on a big, exciting project that requires careful planning and tight collaboration,” she says. And thankfully, she’s put her skills and experience into this helpful RFP guide and template.

**Here are Dafna’s five key steps to creating an awesome RFP.**

## 1. Assembling your dream team

[Recruit a diverse group of stakeholders](#) from all relevant departments – HR, IT, internal comms, and procurement, for example. This diverse group of stakeholders will help you cover all bases and ensure you don’t miss anything crucial. Some might even have experience crafting their own RFPs. Plus, it’s more fun to plan with your bachelorette gang by your side, right?

## 2. Understanding your needs

Your first task as a team is to understand why you need an employee experience app. Are you aiming to boost employee engagement, streamline communication and collaboration, or just improve your company culture?

Run a SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis, gather your team, have a brainstorming session, and write down all the reasons you think an employee experience app is necessary.

Then, leave the Zoom room and interview your colleagues.

After all, they are going to be the end users of this platform, and it’s a good idea to engage them with this project from an early stage.

You can also conduct surveys or invite colleagues to focus groups to gather their insights and preferences.

## 3. Defining your requirements

This is the fun part, where you get to dream big! Now that you understand your problems and have collected intel on needs from various teams, departments, and stakeholders, you get to suggest what features you want in your app.

A user-friendly interface? Seamless integration with existing systems? Automatic translation that leaves nobody behind? Live streaming of company updates? Badges and awards that celebrate individual and team accomplishments? Document storage to build a single source of truth? Advanced reporting and analysis? Create a spreadsheet, group your needs into must-haves (non-negotiable requirements tied to core objectives) and nice-to-haves (that add value), and attach this document to your RFP.

Trust us, this evaluation criteria is going to serve you well.



# DETERMINE WHAT IS ✨ IMPORTANT FOR YOU. 🤔

Reaching your **entire workforce** with a comprehensive suite of internal comms tools? e.g.

- Content calendar
- Campaigns
- News articles and posts
- An email channel for newsletters
- Read Receipts
- Options for top down and open comms
- Digital signage
- Auto translations
- Podcasts and Livestreams
- AI content generation
- Two-way chat and a frontline ready mobile app

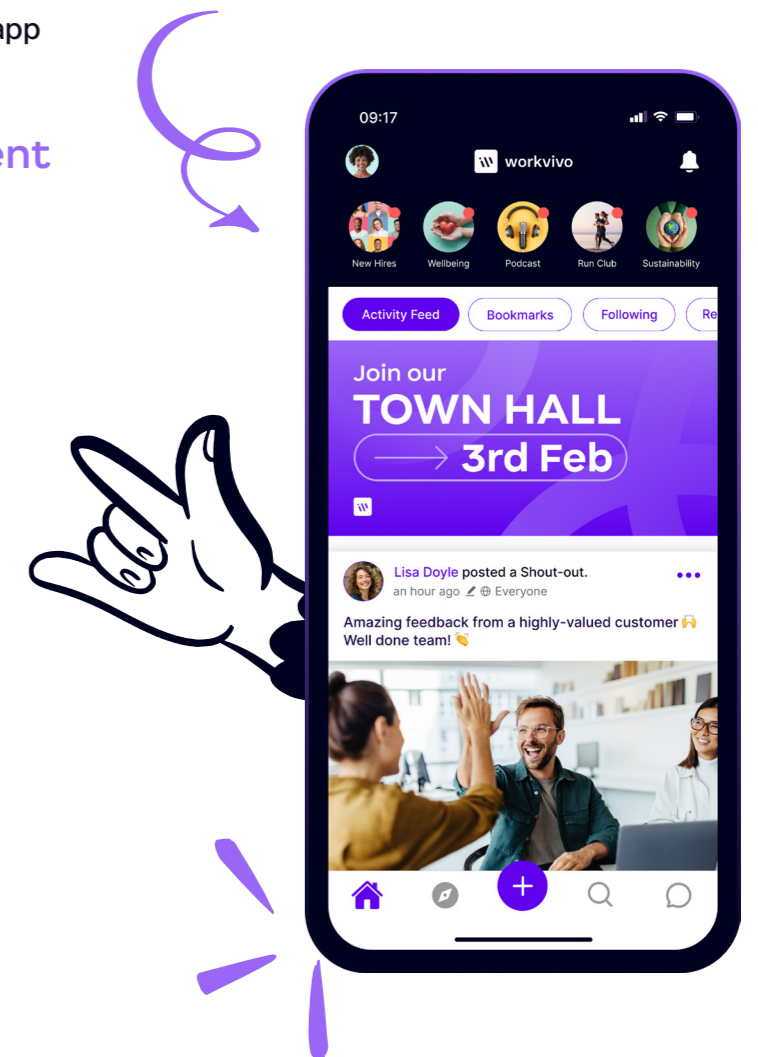
Boosting **employee engagement** and company culture? e.g.

- Community Spaces
- Shoutouts
- Badges and Awards
- Company Values
- Polls and Surveys
- Employee Listening

Creating a **clear centre of gravity** for employees? e.g.

- Integrations with your current tools tech stack
- Document storage and management
- Custom widgets
- Org charts and people directory
- Landing pages
- Personal profiles
- Wiki's

## ALL OF THE ABOVE?





#### 4. Researching potential vendors

Do some market research to identify potential vendors and assess their product fit, known clients, implementation approach, pricing models, and support structure.

There's no Tinder for vendors... so, ask for recommendations from your network, find review websites for software comparisons, search for analyst reports, read customer reviews, and check out their websites.

Look for blog posts, case studies, or even social media mentions where companies discuss their experience with employee experience apps. Find out which employee experience apps your competitors are using. (Your manager is going to love hearing this!)



#### 5. Drafting the RFP document

This is where you clearly define terms, requirements, and evaluation criteria. Add strong visuals like charts and tables to clarify your needs.

Remember: a well-done RFP leads to better proposals, seamless work relationships, and the outcomes you desire.

Don't be afraid to inject a bit of personality into your RFP. After all, you're not just looking for a new platform – you're looking for a partner that understands your company's culture and values.

Dafna's breakdown of the essential elements is [ready and waiting here](#).

And here's a bonus: [our RFP template](#) to help you get started! Use it to inspire your own creation, or download and edit it for added convenience.



## Assessing your Potential Matches

Wahey, the potential matches have started coming in! Whether you've got three or 30 potential partners, being organized is key to helping you choose.

What's crucial here is employing your vendor criteria, which you'll have set out in your RFP and decided on internally.

It's like selecting a venue for your first date. Try to picture your most precious moments in each one!

### Assessment step #1

Evaluate each proposal against your criteria and shortlist the top contenders based on their capabilities and alignment with your needs.

### Assessment step #2

Here, you can enlist the help of a [vendor comparison matrix](#) – a grid-style tool used during the RFP evaluation process that makes the key differences between the proposals you got crystal clear.

Alongside your RFP, the matrix is a grid that lists your evaluation criteria down the left side (the y-axis) with potential vendors listed across the top (the x-axis). But you can totally make it your own, too!

### Assessment step #3

Invite the shortlisted vendors for presentations and demos. This will give you a better idea of what they can offer and a vision of how well they understand your needs. Prepare a list of questions and don't hesitate to dig deep to gain precious insights into each vendor's capabilities and fit for your project.

As Dafna says, "This step is just like meeting the parents... we're getting serious here!"

### The final step: making your decision!

After the presentations, gather your team and discuss the pros and cons of each vendor. Consider all factors, including price, functionality, and vendor support.

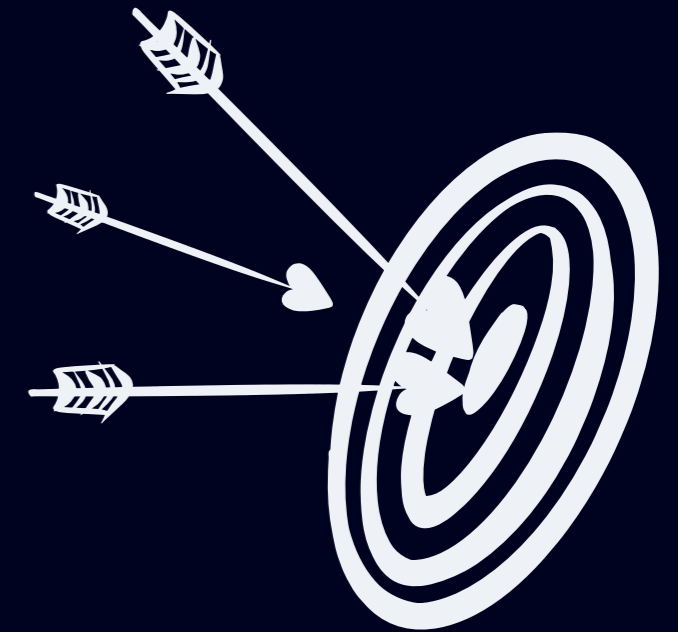
Looking for advice more specific to your situation? We've also put together these resources:

→ [Choosing the right EXP as an SMB](#)

→ [Choosing the right EXP as an Enterprise](#)

→ [Choosing the right EXP as a CIO](#)

→ [Choosing the right EXP as an internal communicator](#)



# KEY FACTORS FOR YOUR DECISION

## What to look out for...

If you're still not totally confident on who to go with based on your evaluation criteria, here are [some of the most important things to look out for](#) in the proposals you receive. It's really worth making as informed a decision as possible before committing to a long-term relationship that leaves you stuck in a rut.

## Worker types + accessibility

Are your employees primarily hybrid or remote? Do your teams work on the front line, behind a desk, or a combination of both? Whatever EXP you choose to migrate to should be proven in its ability to engage all types of workers, whether that's through a strong mobile app, podcasts shift employees can listen back to in their own time, and more.

## Security

Whether you're a financial services company or a medical institution, the information you store on your new platform and the conversations it makes possible should be secure. Nobody – from your CIO to junior team members – should have to worry about privacy and data safety when they engage with their new EXP.

## Customer support

How much help does the team behind the tool you're considering offer? Can they tailor packages to your needs and share expert advice and additional consulting? Will they continue to guide you after your new platform has been built and launched?

These are all important things to gauge before you commit, and could be the deciding factor between two strong candidates.

## DID YOU KNOW

*Workvivo has a customer satisfaction score of 98%? Pretty impressive, if you want our totally unbiased opinion...*

## Budget

Maybe an obvious one, but having a good handle on your budget could make all the difference. You might have different opinions on what you're willing to pay that bit extra for if a tool seems like the perfect match, for example.

## Reviews

Do your research. Trusted review sites like G2, TrustRadius, and Gartner Peer Insights feature comments and scores for different apps from real users. You can learn a lot about how a tool truly functions and whether people actually like using it or not by reading them.

## Personalization + features

The features you want in your new EXP will probably depend on a few things, like how and where your people work, the industry you're in, the size of your team, how dispersed your organization is, and the kinds of communication you want to use it for.

Consider these areas and how features – from activity feeds, private group spaces, and livestreaming to employee shoutouts and badges – align with your needs and priorities.

## Integrations

If integrations are among your evaluation criteria, how does each proposal hold up in this category? Will it provide your people with a seamless experience as they begin their day in a central platform and then navigate to things like rosters, payslips, PTO dashboards, and more?

## Do a landmine discovery Q+A with potential migration tools

A large, stylized graphic of the letters 'Q+A' in a light purple color, set against a dark blue background with faint, abstract shapes. The 'Q' is on the left, followed by a plus sign, and the 'A' is on the right.

Ask your vendor **these questions**. You don't want to set yourself up for nasty surprises down the line.

**Was your migration tool developed by a non-Meta third party?** Yes → Risk alert! → Don't go there.

**Do you charge for the migration?** Yes → This means it's primarily manual and requires a heavy lift to execute → Unreliable → We define this as a no-go.

**Can you share cases of at least 10 satisfied customers that have successfully migrated?** No → Unproven → Another no-go.

**What's the biggest migration you have handled to date?** Less than 50k employees → Scalability and robustness questionable → Be wary.

**How long will it take to import our data into your platform?** More than a day → Uh oh... Workvivo can import hundreds and thousands of data points in minutes → No comparison.



# Laying the groundwork – the nitty-gritty of your migration



Now that you've made your decision, and taken a breather to give yourself a well-deserved pat on the back and copious amounts of celebratory chocolate, it's time to kick off the migration.

Once again, planning and organization are key. [Use our handy Migration Plan Checklist](#) to set out your next steps with confidence.

But what are those next steps, exactly? One of the biggest parts of your project will be figuring out what you need to migrate to your new EXP. A sample content-migration strategy, as [outlined by Cat DiStasio for us here](#), might look like this.

- Evaluate your current content inventory
- Perform a content audit
- Identify opportunities to update or improve content, such as making it more user-friendly
- Create a vision or wishlist for your new EXP
- Put together a taskforce to perform content migration
- Keep track of migration progress (find a spreadsheet lover and put them in charge of this)
- Proofread all your content assets during migration

Once you have an idea of what you're bringing with you, it's time to actually do it. Scary, we know. [Here's what you can expect.](#)



## Content and data inventory

Migrating to a new platform is a great opportunity to do a little spring cleaning! But before you start throwing things in the junk pile, invest time in taking stock.

Whichever tool you've been using up to this point, you'll undoubtedly have stored information on it. That could be anything from important policy documents and PTO instructions to leadership podcasts and video recordings of town halls.

The most reliable way of making sure nothing gets lost that shouldn't is to know exactly what you have and where you have it. That can be as simple as setting up a spreadsheet with different tabs dedicated to categories, Marie Kondo-style, like HR Documents, Team Photos, and more.

## Auditing your content

Now, on to that spring cleaning we mentioned. Since you've put the work into documenting every piece of content that exists on your legacy platform, you're all set up to go through it with a red pen.

Lean on your taskforce to help make decisions on what you should migrate and what you should lose. You don't want to delete something another team uses just because it doesn't spark joy for you! (Yes, we're having a Marie Kondo moment.)

These are the kinds of questions you and your colleagues should ask when determining what stays and what goes.

Is this content accurate and up to date?

When was the last time this content was opened or downloaded?

Does this content still align with our organization's goal, culture, values, and vision?

Is there an obvious place this content will be stored on our new platform?

Does this content contain enough information, or are supporting docs needed?

## Migrating your content

Once you've finalized what needs to be migrated over, it's time to – that's right – ask yourself yet more questions.

- How it will be transferred or recreated?
- Is it a case of downloading documents to a secure folder and reuploading them to the new platform?
- Who will migrate it?
- Will we assign a task force to copy over a certain amount of content per day?
- What areas of content should the task force prioritize?
- What's the deadline for migrating our content across?
- Where will each piece of content live on our new platform?
- Will employees be able to find it easily?\*

*\*Side note: With the right EXP, one that's intuitive and built with the user in mind, this should be covered!*

We have advice and a lovely [content migration checklist from expert contributor Cat DiStasio](#) for you to use when working through this part of your project. Check them out here!

## Building your user journeys

Like we said, your EXP migration is a great opportunity to clear out some clutter. That doesn't just apply to content – it's also a chance to improve your employees' experiences by rethinking their user journeys!

For example, maybe your legacy tool meant that frontline employees, like those working in a warehouse or driving delivery trucks, had to spend time they didn't have trawling through irrelevant and overwhelming resources.

With your shiny new EXP, you could house all your frontline-specific documentation in one place, like a Frontline Space, to keep everything tidy and accessible. If your company is big enough, it might even be worth breaking this part of your EXP down further into user personas, like Warehouse Staff, Delivery Drivers, and more.

Something to remember here is that you shouldn't just assume what employees want to change, or how they want their journeys to evolve; your best bet is to do some internal user research to deduce what exactly they want from their new EXP and to refine your user journeys accordingly.

Ideally, you'll also involve employees themselves in the journey mapping. You can host workshops that invite people to share what their go-to interaction with your EXP to find a certain document would be, for example.

The outcome is a significantly better chance of genuine employee engagement.

PSSST... 

if you're here because you're looking for information on the specific migration process from Workplace from Meta to Workvivo [you're better off with this guy.](#)



# Setting yourself up for a lifetime of love (and long-term success)

You've trekked through the RFP and migration processes like the fellowship of the ring, but hopefully you haven't ended up at Mordor. You've still got some work to do, though – namely, making it through the honeymoon phase and enjoying long-term EXP success.

The goal is to run off with your new EXP into the sunset, and getting there takes the right balance of change management, internal communication, employee engagement, and data analysis.

## Change management + internal comms planning

If you want people to engage with your new EXP, you need to include them in as much of the journey as possible. Just like with any relationship, communication is king!

That's why [building a robust internal communications and change management plan is a non-negotiable](#) for both initial and long-term success.

## Here are some key pointers to keep in mind:

Be honest and clear about your business objectives

Be honest and clear about the potential impacts of your new EXP on employees

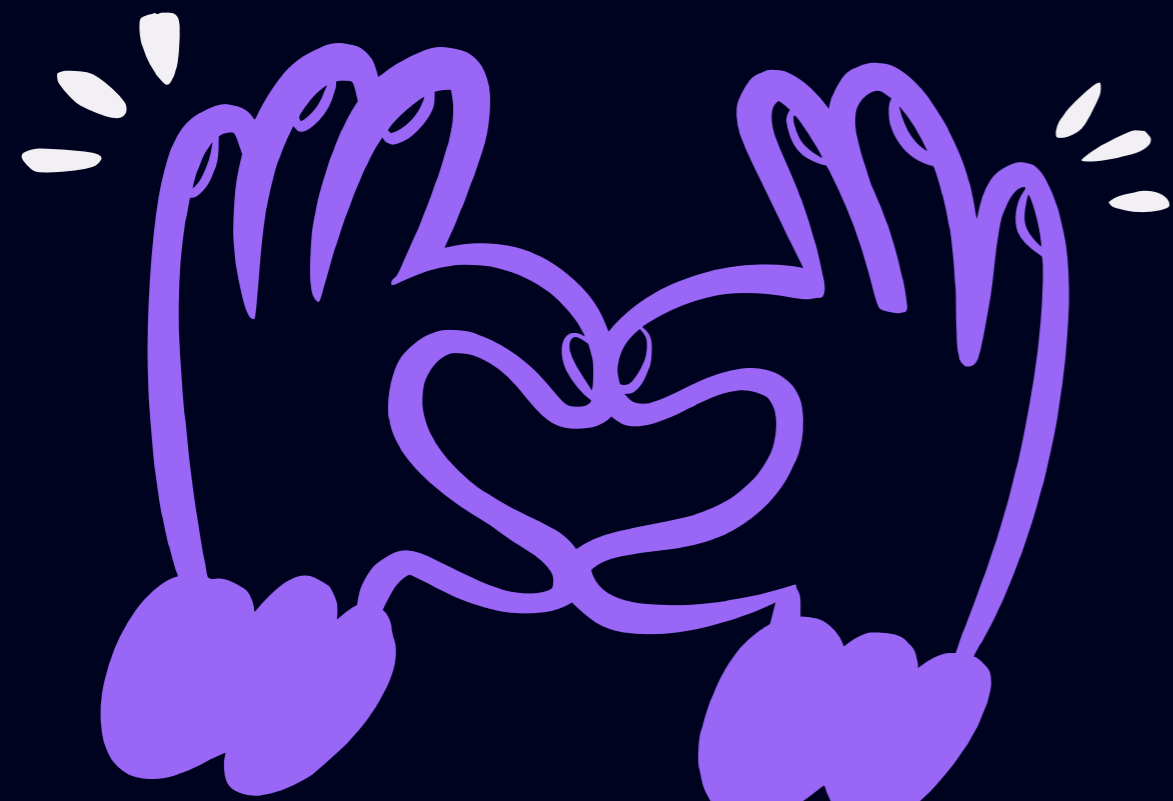
Do a change impact assessment: examine impact level and anticipated resistance + advocacy

Keep training and communication simple

Ask for – and listen to – concerns and feedback  
Expect lots of questions ([and prepare for them with these tips](#))

Again, be honest and be clear: if you don't know the answer to something, it's better to say that instead of waffling\*

*\*Waffles during EXP migrations? Bad. Waffles for your loved one as a heartfelt treat? Good.*





# ENGAGING EMPLOYEES WITH YOUR NEW EXP



## The simplest ways to engage people with your new EXP

One of the simplest ways to [engage people with your new EXP is to lean on its features](#). With Workvivo, for example, you can incorporate livestreams, [podcasts](#), and Shoutouts into your launch, giving teams a taste of what they can expect.

An easy but effective way to achieve this is by nominating EXP Champions. Caitlin Kirwan writes, “These employees can become ambassadors for your migration, helping to drive engagement and create awareness and understanding among their colleagues. It’s a well-known fact that people tend to have a higher level of trust in information that comes from a peer, so your platform champions will help build employee confidence in the new platform.

“Make sure you recruit and involve your platform champions at the start of the migration process to give them a chance to offer feedback and be involved with the development of your launch plan. They’ll probably be more keen to get stuck in than you think!”

Caitlin also recommends hosting leader previews of your new EXP, so that they can spread the word and lead by example from the outset, and incorporating some fun into your company-wide launch, like branded merch and competitions.



## Measuring success

Finally, if you’re in it for the long run, measuring the success and ROI of your EXP is an absolute must.

There are a few ways to do this, which include actions like defining your goals and choosing the right KPIs – examples of which can include Active Users, File Sharing, Time Saved, Lower Admin Costs, Employee Satisfaction, User-Generated Content, and more.

(For a longer list, [click here!](#))

With the right EXP, you’ll be able to measure many of these KPIs (and more) through analytics functions in the platform itself. [Workvivo has Advanced Analytics and Employee Insights capabilities](#), which help employers delve deeper through actions like [employee listening](#).



# PS. CONSIDERING WORKVIVO?



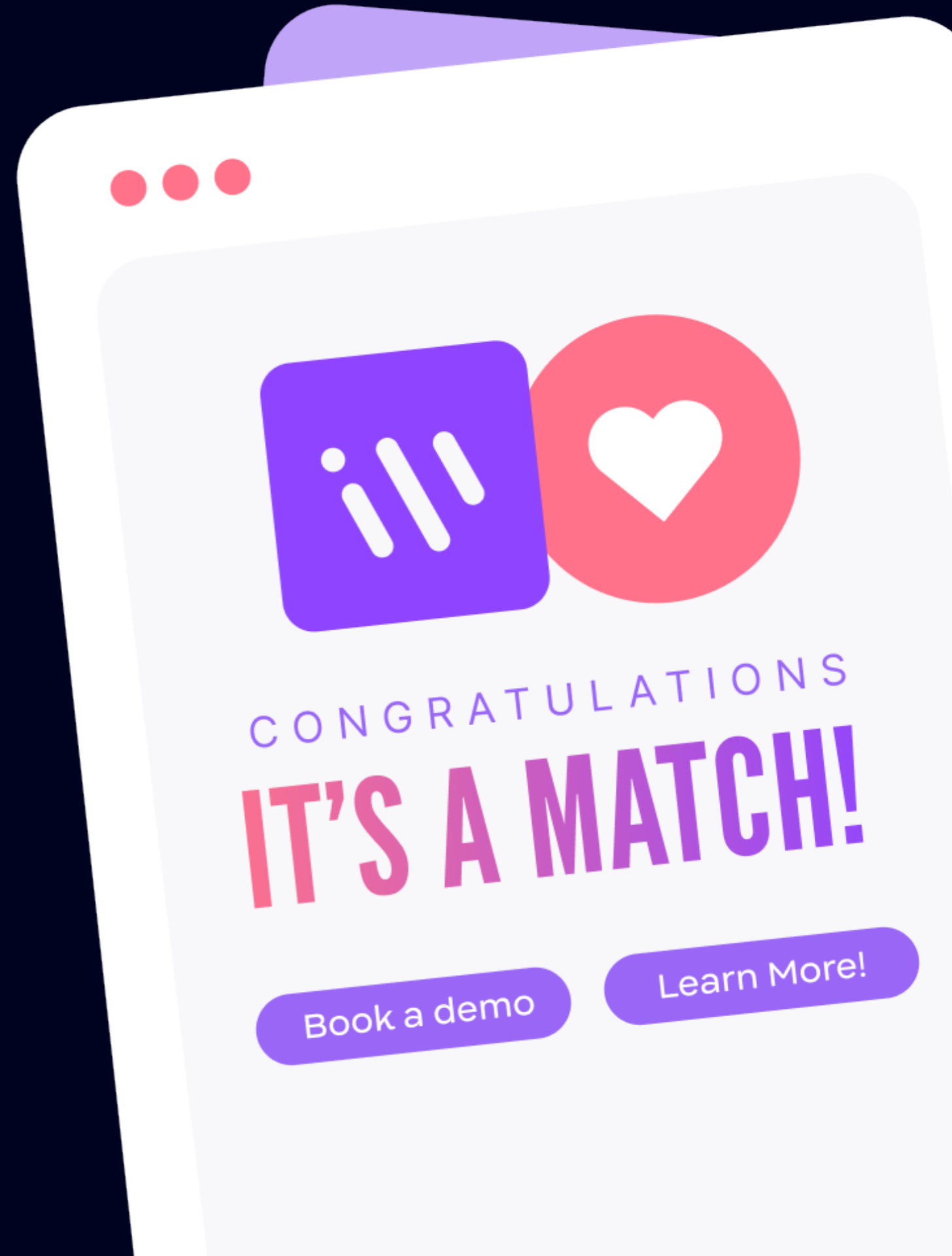
If you're coming from Workplace from Meta, there are lots (trust us, loads) of [reasons to seriously consider Workvivo](#) as your new home.

- Our stellar customer support team
- Our 3 big promises
- Our easy-as-pie and super-secure migration tool
- Guaranteed seamless EX continuity
- We're Meta's official migration partner

And if you're thinking of migrating from another platform, or browsing for your first-ever employee app, then we can give you plenty more reasons to keep us top of your list. All you have to do is book a demo and we'll do the rest.

[Book a Demo](#)

[workvivo.com](https://workvivo.com)







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by zoom