# The Ultimate Guide to Choosing an HR Technology Partner

Nine critical checkpoints on the path to a winning technology partnership

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# Introduction

Hi there,

My name is Sharon Fagan, and I'm the U.S. Director of Client Success at Reward Gateway. My team and I have worked with many companies to take their engagement strategies to the next level. In that time, I've seen hundreds of new technology companies enter the market, providing HR professionals plenty of choice when it comes to choosing solutions that address their employee engagement needs.

We understand that while having options is a great thing, having too many can become overwhelming. The last thing we want is you spending your time building a solid business case working with a company that wins your business' tick of approval, only to realize that the long-term costs will be detrimental to driving business value, or that your people aren't going to receive the experience you were originally promised.

Whether you're selecting a new employee engagement platform for the first time or looking for a different partner, we all start out unsure: We don't yet know what we don't know.

That's why we've developed this eBook to help you navigate your own decision-making journey. Like any great guide, we hope you find it informative, practical and inspiring!

Let's make the world a better place to work,

**Sharon Fagan**
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# Part 1:
# **Defining Your Engagement Objectives**

**As a buyer, you first need to understand what sparked your search for new technology in your business. Perhaps your business is going through rapid growth or significant change, or feedback from your people highlighted cultural issues that need to be addressed.**

It might be your goal to improve employees' understanding of your company's purpose, mission and values, provide a channel for more open and honest communication, or practice better and more consistent recognition. Finding a platform that can address many of your needs, or can grow with you over time, will ultimately be more valuable to your business.

Think of the real value of your solution – is it a tick box solution or a higher-value solution that will drive your strategy forward?

It probably goes without saying, but selecting an employee engagement company is a big commitment. Even if you opt for the minimum contract length available, it's a choice that will likely affect your employees' day-to-day experience, especially if you aim to launch a platform that you want your people accessing on a regular basis (which an employee engagement platform most certainly is!).

**Start here:**

☐ **Will this company help me address my employee engagement goals?**

☐ **Can this company evolve with my engagement strategy?**

☐ **Does the solution cover a broad scope of needs (e.g. recognition, communications and a variety of surveys) or just one tick box feature?**

> Studies show that organizations with engaged teams experience lower turnover, 21% greater profitability, 17% higher productivity and 10% higher customer ratings than disengaged teams.
> (Source: Gallup)

Choose poorly, and the negative impact can take years to undo. But choose wisely, and the positive impact on employee motivation, productivity, communication, alignment, customer service, employer branding and ultimately, your business' bottom line, is something your people and you will be able to experience (and measure and celebrate!) every day.

It makes sense that you want to make the best possible decision for your employee engagement provider. But how do you know which one is the best one for your business?

**We've outlined nine different elements that you should consider before making your choice, which we'll detail later in the eBook:**

**Budget**
What is your solution really going to cost you?

**Security**
Keeping your employee data safe

**Integrations**
Working seamlessly with current technologies

**Implementation**
Building a platform to perfection

**Design**
Create something unique to your business

**Launch**
Get everyone excited and on the same page

**Usage**
Maintaining momentum to increase ROI

**Support**
Will you (and your people!) be looked after?

**Customer Success**
Will this be a long-term relationship?

# Part 2:
# Finding Your Perfect Solution

There's nothing more disappointing than getting your favorite pizza delivered, opening up the box and finding out they gave you the completely wrong toppings. The anticipation of that meal was built up, and now you've wasted your hard-earned money on something that just doesn't quite satisfy what you were craving.

**It's the same as dealing with a new partner. You should be up front with your questions and needs so that when you finally open up that "box," you're getting exactly what you paid for!**

Use this time to ask your potential partner as many questions as you can and take a closer look at what they're offering. Let's first walk through three core pieces of your partner puzzle: **Budget, Security and Integrations.**



### Budget
What will this platform really cost you?

### Security
Will your employees' data be safe?

### Integrations
Will the new platform work alongside your existing software?

## Budget

One of the questions you should be asking about is your **partner's pricing model**. A low, upfront setup fee might look enticing at first, but beware of what additional costs you might incur if it doesn't include what you expect.

You may see one low cost up front, but dig in to find out what you're *actually* getting.

**Core budget questions:**

- What do the service costs look like? Is this one-time, or will there be ongoing fees? Will your annual fee change?

- What about back-end fees?

- Is there additional cost for changes to the platform post-launch?

In the case of reward and recognition providers, transparency is a buzzword I often hear. With a traditional points system, there can often be administrative or delivery fees to redeem points for a reward, plus the points currency can also be confusing, eroding that reward's true value. Giving employees a choice in what they want to be rewarded with and that has a dollar-for-dollar value not only creates a better experience for your people, but also eliminates potential backend fees that can add up from your partnering company!

### Finding a partner, not just a vendor

If you go to a dollar store for a premium product, you probably will wind up disappointed. The same is true for your vendor relationship, where the real value is in the partnership they'll provide, which starts with your contract management. Consider these questions as you evaluate your new partner:

- Is the entire payment required upfront?

- When it comes to product feedback and requests, do you feel like you're being heard?

- Does the company work with you to find the best solution?

- Do you feel like you are dealing with humans, or just a company?

# Security

With over 5 billion people around the world using the internet and thousands of new apps being created each week, it makes sense to use technology to improve efficiency and visibility both in our personal and professional lives. But with the advantages come risks, and it is critical to choose a vendor that is committed to keeping your employee data safe and secure.

At Reward Gateway, security is our top priority – it's one of the reasons we exist and why companies can confidently partner with us. We ensure the products we create do not erode our customers' privacy and do not facilitate surveillance and monitoring.

**Consider... what is your partner's approach to security?**

Reward Gateway has a multilayered or "onion" approach to keeping company data safe and sound. This is known as "defense in depth" – we're protecting our critical assets in the middle of the onion: our customer data. We then add layers upon layers around our assets to protect them. We are ISO 27001 certified and have been since 2010.
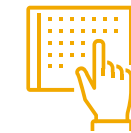
## How will your employees access the system?

Having the option for single sign-on so that employees can access the platform without having to remember additional credentials can help increase login and participation rates and makes for a seamless user experience.

# Integrations

Speaking of a seamless user experience, now is a good time to consider how this new platform will talk to the rest of your existing tech stack. You don't want to add to the long list of administrative tasks already on your plate, so choosing a platform that automates the administration for you is going to be a big bonus.

**Can your new platform talk to and share information with other communication channels?**

Sharing information like recognition moments or important company news automatically from one system to another helps spread the message far and wide, which keeps your employee engagement initiatives front of mind for your people. Practice efficient and effective communications by reaching employees where they are. Look for opportunities to integrate employee recognition or communication into channels your people are already using, like instant messaging apps, staff intranet pages or even TV screens around the office.

## Three common integration types

With thousands of products available to assist the day-to-day of HR, looking for technology that works seamlessly together is critical to keep the wheels on your people-centric bus moving. Here are three common integrations to ask about:

**User provisioning:** Can your partner assure you that your system will keep up with new starters and leavers? How is their data handled?

**RSS feeds**: When you publish new content, or recognition stories, where does it go? Can you automatically publish it on multiple forums?

**Single sign-on:** How hard is it to navigate passwords and usernames for your employees? Will they have to remember a variety of logins, or can the system do it for them, safely and securely?

**Learn more at rg.co/integrations**

## How much time will you spend on user provisioning?

A common concern for any HR team is how many systems you're going to need to administer on a day-to-day basis. Choosing a system that integrates with existing information systems can save you time spent on data-entry or data-checking as people move in, out and through your organization.

## How easy is it to add integrations?

With a self-service dashboard like the one that Reward Gateway provides on the back end, you have instant access to all our integrations, including easy-to-follow, detailed instructions for your IT team to get dozens of integrations up and running.

## Here are just some of the integrations that can help HR teams save valuable time.
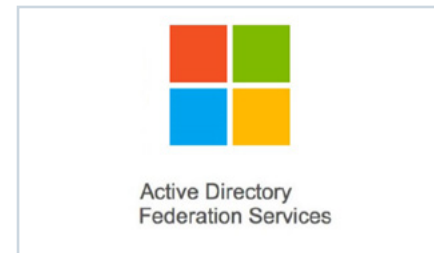
# Part 3:
# **Building Platform Success**

Finding a platform is only part of your journey — next, you'll have to work with your partner company to actually build and launch your platform. From my experience, this is where many buyers experience frustrations because they're not given clear guidance, or may be dealing with a less-experienced team that can't take the reins for an effective and successful launch.

Achieving business results begins the proper relationship once the i's are dotted and the t's are crossed. That comes with our next three elements on the company checklist: **Implementation, Design and Launch.**



### Implementation
Will your partner build a platform that suits your needs?

### Design
Will your employees recognize your platform within your employer brand?

### Launch
How will you build excitement to make sure people engage with your platform?

# Implementation

## What happens after you sign the contract?

Up until the time you sign a contract with a company, you've probably been dealing with a consultant. But this doesn't mean the consultant is the same person who will lead you (and your people or tech team) through the platform set up, design and configuration. It's a good idea to find out exactly who will be involved in helping you set up your new tech.

Ask the company if there is a specialist at each stage of the implementation process who you can turn to for guidance. Who will be available to do some of the heavy lifting for you?

## A winning team

At Reward Gateway, we assign each new client a project team that helps them through the process and beyond. That team consists of the following people:

**Employee Engagement Consultant:** Helps with the program's overarching employee engagement strategy to determine how we can best help you reach your goals.

**Implementation Specialist:** Your dedicated project manager, responsible for building your unique, tailored solution. Oversees all the details from kickoff to launch and serves as your liaison to other Reward Gateway technical resources to get your program up and running with ease.
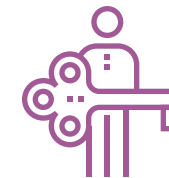
**Client Success Manager:** Once your program is up and running, your Client Success Manager will be your go-to partner for ensuring long-term success, advising you on best practices to make continuous improvements and drive business results.

## What will your project look like?

Depending on the type of platform you launch, your partner may need things like your company's brand guidelines and photographs of your employees, a map of your reward and recognition workflows and user lists in specific file formats. Ask if the company will provide a list of these items and explain what is required at different points of the project, and the areas their specialists can help in.

## Who will be responsible for what?

Be clear early in the process who will be responsible for different parts of the platform set up and design, and what you will need to drive and take a lead on internally, versus what your vendor will manage for you.

Reward Gateway's expert Implementation Team provides an Implementation Guide that details your entire project, with relevant links to resources such as guides on how to navigate your platform or how to add content. It also covers timing for key milestones to make sure your project hits the agreed upon launch date, and how the team will help guide you through every phase and decision.

## Design

At Reward Gateway, we provide a complete design service for our employee engagement solutions, both during implementation and ongoing. Some clients choose to DIY if they have an in-house design team, but most clients prefer to use our services since we've done it so many times. Because of our experience, we're in a position to make recommendations on best practice site layout and offer creative ideas to develop a true brand for your platform.

**Will your employees associate your platform with your company, values and mission, or is your employer brand lost in what the platform delivers?**

**Here are some things to consider:**

- Are you paying someone to just configure a system, or will they partner with you to design and create something unique to your business?

- How deep does the design go? Is it just putting a logo in a corner and calling it a day, or do they offer a variety of layout ideas and specialized design?

- Are they happy to liaise with the right people – be it your team or directly with internal marketing and communications – to make life a bit easier and efficient?
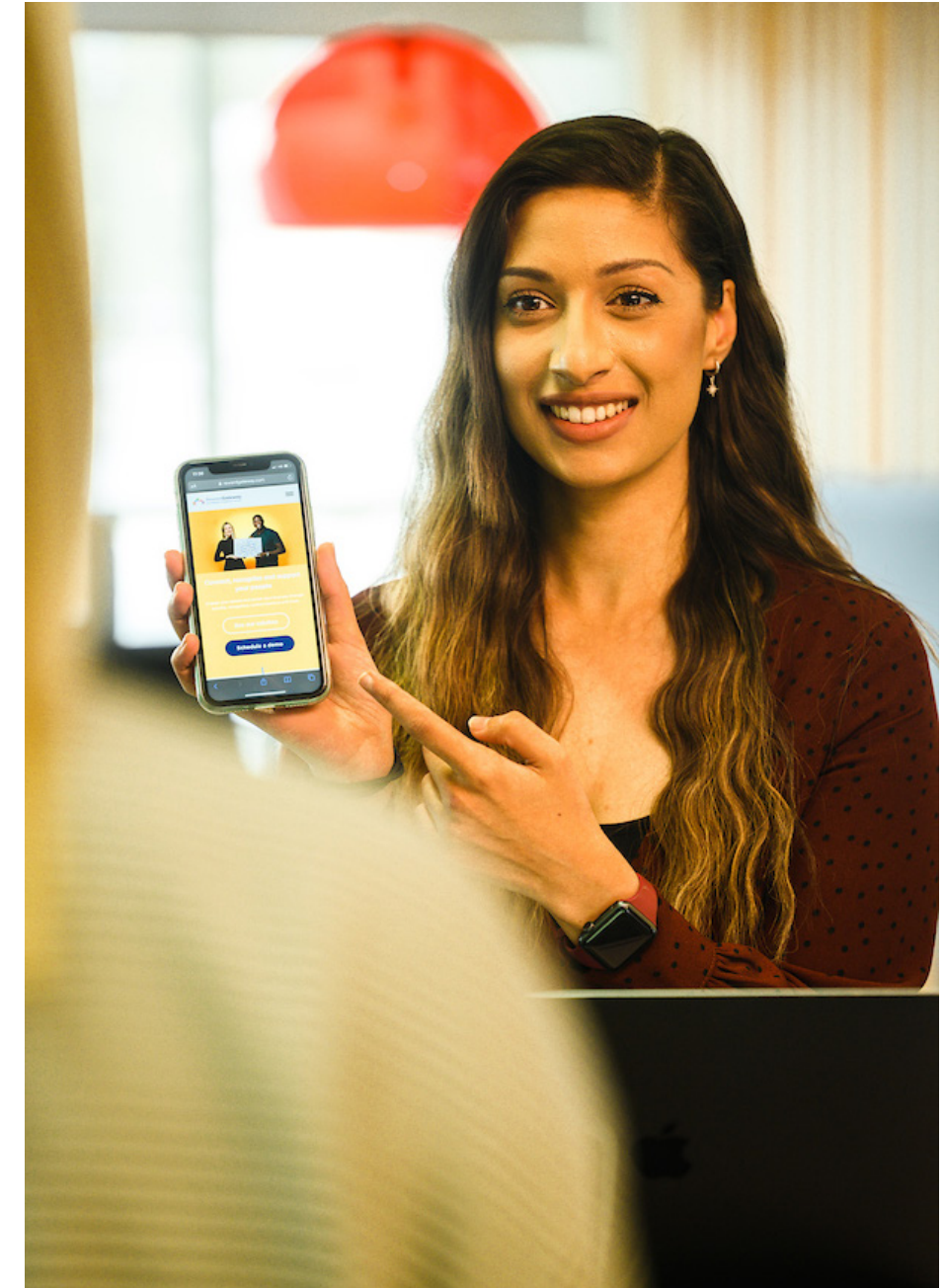
# Launch

Given all the hard work that will go into getting your new platform up and running, the last thing you want is low adoption from your employees!

> **The key to success is usage. You can have the flashiest platform in the world, but if your employees aren't using it, you aren't getting the true value of your investment.**

The launch is arguably one of the most important pieces to pave the way to success. That's why you should never skip over asking companies how they'll help you launch your hub with a bang. Consider:

- Are you provided with an expert implementation and launch team to give you guidance?

- Do you have support in creating launch materials (e.g. posters, flyers, direct-mailers or launch videos) to get your people excited?

- Is there manager or leadership training available to support driving adoption?

And while it's good to spend a lot of time on this up front, pre-launch, make sure it doesn't stop once your platform is live. Continued employee communications is the key to success, using insights from platform usage to drive ongoing engagement.

# Part 4:
# Continuing the Engagement Journey

As the saying goes, "Success is a journey, not a destination." And while Arthur Ashe probably wasn't talking about how to engage employees (he was definitely talking about tennis), his words still ring true – success doesn't happen overnight. When defining your own version of successes – whether that's higher engagement scores, better communications among leaders and team members, reduced turnover or something else – success will only come if you have the right teammates on your side.

Set yourself up on a path to success by making sure you're building a team around your needs, and those of your business. Let's go over the last batch in our company checklist: **Usage, Support and Success.**



### Usage
Will people actually use the technology?

### Support
What happens if there are problems with my solution?

### Success
How do I prove the ROI of my program to my leadership team?

# Usage

Investment in technology is rising, but employee engagement remains flat. And why is this? We believe it's because without usage, technology has little impact. It's so important to get the right team on your side from the get-go who can help you effectively roll out your platform and walk you through all of its features. Your people won't use what you put in place unless they understand how it benefits them — high participation and positive results, that's what you're after, right?

Getting excited about what the platform will provide is one thing, but learning how to access and use it is another.

- Is manager training available? Or, is there enough self-guided training that your employees can easily understand?

- What tools and techniques do they have up their sleeves to ensure everyone is equipped with the know-how to use and manage the program, or where and when to access support?

- Is the company knowledgeable about best practices to ensure optimal usage of the platform to make your investment worth it?
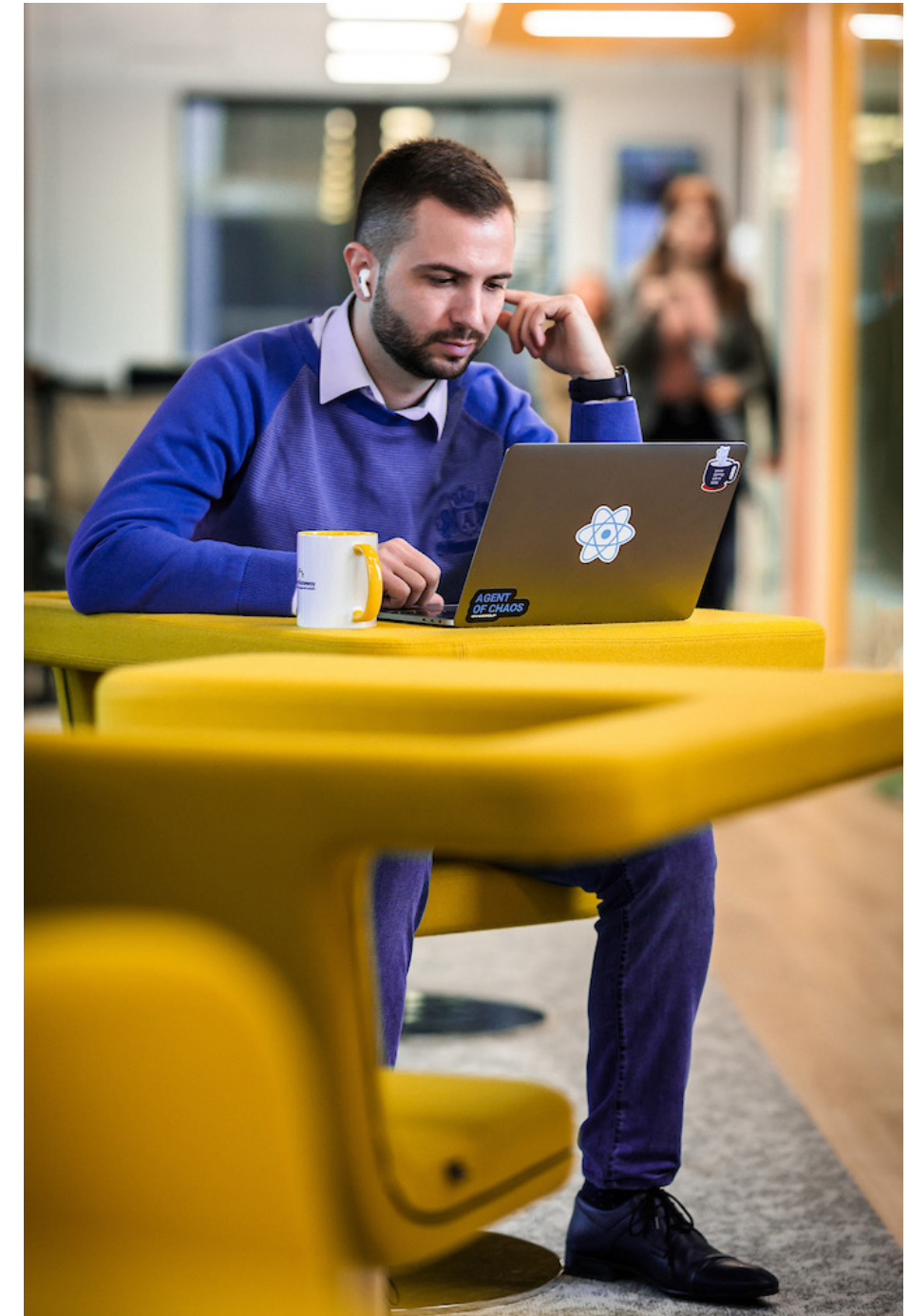
## Support

If employees have trouble using the new system, do queries go to the HR team, or do they contact the partner for support? Not every engagement program is going to be accessed within business hours. Employees might access their employee discounts when they're at the grocery store on a weekend, or redeem a reward during the commute home. If you're providing them this type of program, then 24/7 program support means you don't walk into an overflowing inbox of employee questions when you get into work the next day!

**Core questions to consider:**

- What happens if something on the platform doesn't work? Is additional support an extra cost?

- Does platform management fall solely with the buyer? How does the partner support with day-to-day queries and needs?
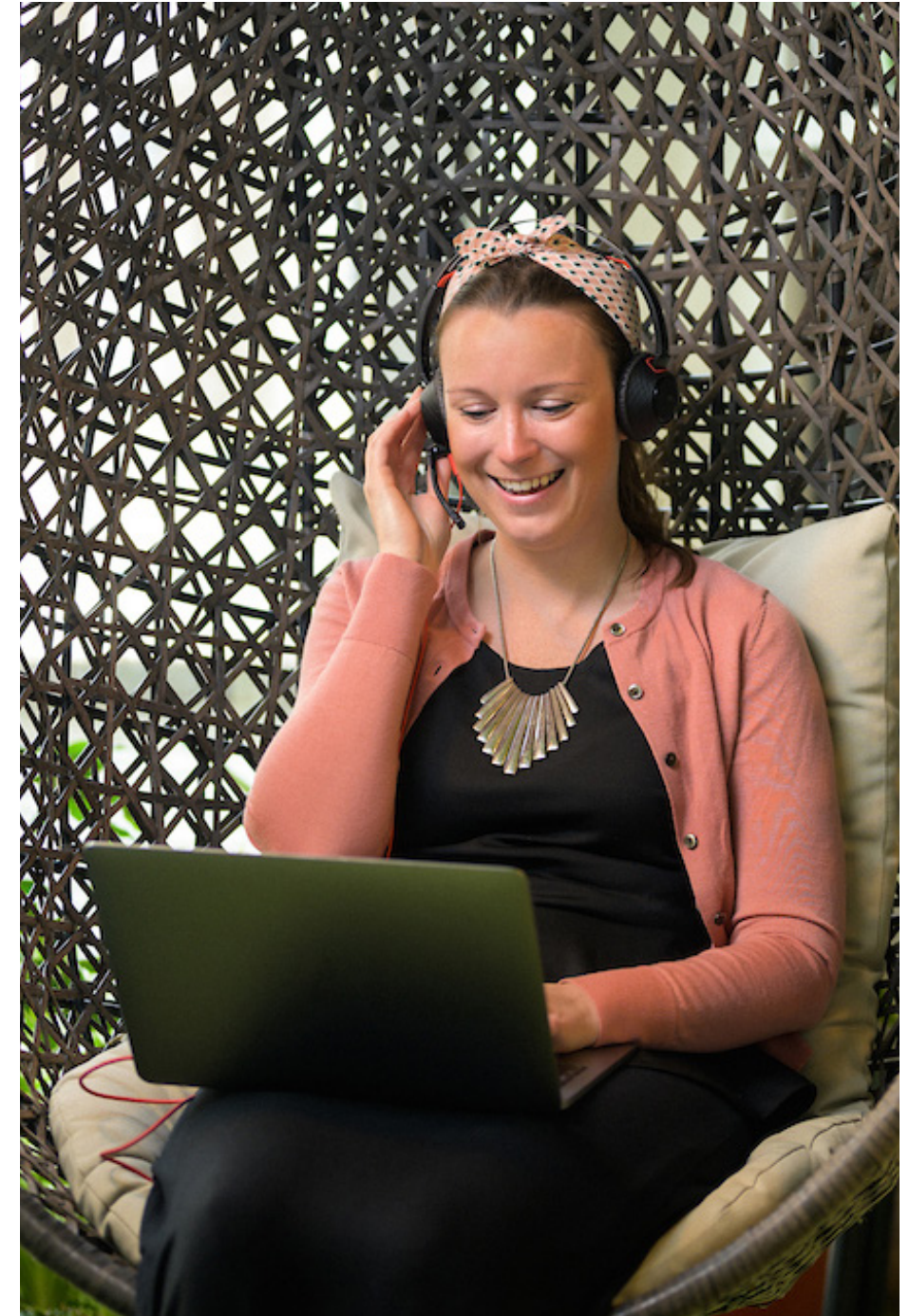
# Success

While some HR programs are designed for self-service and a "set it and forget it" approach, employee engagement platforms are a bit different. Normally, you'll want someone in-house who keeps an eye on usage and adoption, and then an expert on the technical side of your platform. These two pieces fit together to make sure your technology moves the needle on employee engagement in your organization, long after the platform is launched.

This is what our Client Success Managers are for — we work closely with our clients to help them make the most of the platform's reporting capabilities, and articulate real-time and long-term progress during their organization's engagement journey. It's worth identifying what the equivalent is for your chosen partner. If your partner company has an account manager function, it's worth getting more detail on how exactly that individual will support you, your people and your platform.

**The best partners will be able to describe a collaborative account management environment where best practices are shared, dots are connected between your platform and other people/HR initiatives and you understand how your program is driving ROI and business results for the company.**

**What does the company do with customer feedback or feature requests?**

Ask your potential partner about their channels for providing feedback and feature requests, and whether they have a dedicated product or development team working on improving the user experience. Technology is constantly evolving, as are employee expectations, and it's important to partner with someone who is equipped to adapt.

**What does your company partnership actually look like?**

While reliable technical support is critical, consider what support you'll want for the ongoing success of your employee engagement initiatives.

Will you have someone with experience in your line of business dedicated to helping you drive higher visibility and usage of your platform?

Will you have easy access to real-time engagement analytics or will you have to wait for someone to do this for you?

Do you have the option to design elements of your program in-house or can your employee engagement partner provide on-brand elements to give your platform a "wow" factor?

> **Our Client Success team follows the mantra to "Strengthen Relationships, Inspire Results" making sure each and every touchpoint with our clients is an opportunity to deliver value and make the most of their investment.**

**Will you (and your people!) be treated as a valued client?**

Your solution shouldn't be cookie cutter, and neither should the tactics you put in place. That's why finding a partner with a client success team who strives to deliver value by deeply understanding your business is the key to success. Ask yourself:

- What does the company's client satisfaction/ Net Promoter Scores look like?

- What's the tenure of the account executive that will be managing your account?

- Is there help for not only your admins – but also your end users? In what timeframes?

- Does anyone really monitor/ care about your success?

- What touchpoints will you have to measure success?

# The Ultimate Checklist to Choosing an Employee Engagement Tech Partner

### Defining Your Engagement Objectives

- Will this company help me address my employee engagement goals?
- Can this company evolve with my engagement strategy?
- Does the partner cover just one functionality or does the platform cover a broad scope of needs?

### Budget

- What is the partner's pricing model?
- What do the service costs look like? Is this one-time fee, or will there be ongoing fees?
- Will your annual fee change?
- What about back-end fees?
- Is there additional cost for changes to the platform post-launch?

### Security

- What is the company approach to security?
- Is the company ISO27001 certified?
- How will my employees access the system?
- Is single-sign on an option? Is there an additional fee?

### Integration

- Can your new platform talk to/ share information with other HRIS or communication channels?
- What is the process to update employee data?
- Does my team have clear direction on how to set up integrations?

### Implementation

- What happens after you sign the contract?
- Who is involved in the implementation project? Who will be responsible for what?
- What is required from me to get the platform up and running?
- Does the partner have experience?

### Design

- Are you paying someone to just configure a system, or will they partner with you to design and create something tailored to your business?
- How deep does the design go? Is there specialized design available?
- Can I get support on creative branding and platform naming?
- Will the company liaise with your team, marketing and communications to make sure design work is efficient?

## Launch

- [ ] Are you provided with an expert implementation and launch team to give you guidance?
- [ ] Do you have support in creating launch materials to get your people excited?
- [ ] Is there manager or leadership training available to support with driving adoption?

## Usage

- [ ] What tools and techniques does your partner have to ensure everyone is equipped with the know-how to use and manage the program?
- [ ] How do your people know where to go for support?
- [ ] Is your partner knowledgeable about best practices to ensure optimal usage of the platform to make your investment worth it?

## Support

- [ ] What happens if the platform doesn't work?
- [ ] Is additional support an extra cost?
- [ ] Does platform management fall solely with the buyer?
- [ ] Can the partner support in loading content or changing files if needed?

## Customer Success

- [ ] What does the company do with customer feedback or feature requests?
- [ ] Will you have someone with experience in your industry dedicated to helping you drive higher visibility and usage of your platform?
- [ ] Will you have easy access to real-time engagement analytics, or will you have to wait for someone to do this for you?
- [ ] Do you have the option to design elements of your program in-house, or can your partner provide on-brand elements for a "wow" factor?

## Your value as a client

- [ ] What does the company client satisfaction/ Net Promoter Scores look like?
- [ ] What's the tenure of the account executive that will be managing your account?
- [ ] Is there help for not only your admins – but your end users? What timeframes?
- [ ] Does anyone really monitor/ care about your success?
- [ ] What touchpoints will you have to measure success?

## And finally...

- [ ] Does this feel like a true partnership, or are you being ignored during your buying journey?

# About Reward Gateway

Reward Gateway helps companies engage, motivate and retain people – every day, all over the world. Partnering with over 4,000 companies in 23 countries, we empower more than 6.5 million employees to connect, appreciate and support one another to make the world a better place to work. Our unified employee engagement hub provides the best of recognition, reward, surveys, benefits and discounts that support the overall wellbeing of our client's employees, enriching their talent acquisition, retention and values-driven growth. Our clients include American Express, Unilever, Samsung, IBM, McDonald's and more.
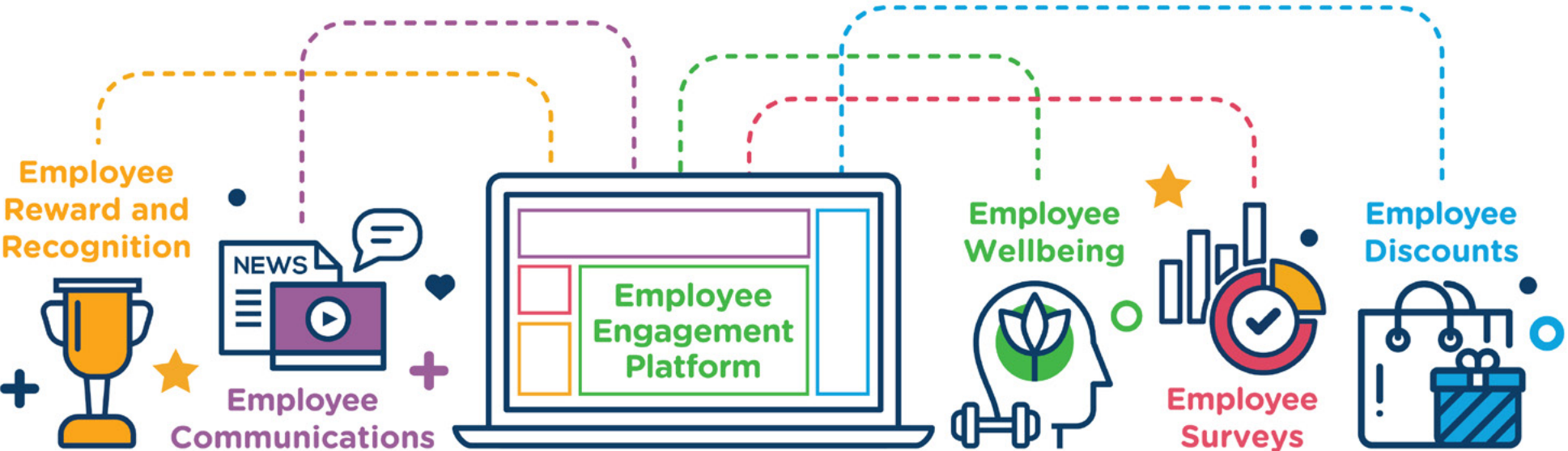
# Conclusion

Choosing a partner isn't easy, but knowing some of the critical checkpoints on your decision-making journey can make it more manageable. The best working relationships are founded on mutual trust and a clear understanding of what to expect from both parties.

Ideally, the relationship you begin with your engagement provider is a long-term one, and that means you will have someone supporting you in achieving your business' unique employee engagement goals. We understand that it affects your employees and their experience at work, so it is an important decision to make.

I hope the points we've run through in this eBook will give you a clear idea of what to consider in your next steps.

If you have any questions on what to look for, or how Reward Gateway can help you put in place a platform to be proud of, then please get in touch with my colleagues and me.

We're here to help you make the world a better place to work. Together.

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