

# Officetalk® Evaluation Guide

OfficeTalk can provide you and your organisation with a comprehensive set of tools to co-ordinate and communicate more efficiently with your workgroup. Planning your OfficeTalk evaluation will allow you to achieve the maximum benefit with the least possible operational interruption.

We have set out the evaluation process in 7 steps. These are intended as guidelines and you should select those that are the most appropriate to the way your organisation works.

## Step 1: Assessing Your Company's Needs

The first step is to consult your potential OfficeTalk users and determine what their needs are. Do they require diary management, group scheduling, meeting management, project management, contact management, remote working or e-mail. After identifying their needs, you can associate them with the features available in OfficeTalk. Sareen Software's support team can help you match your requirements to OfficeTalk's features.

## Step 2: Establishing A Pilot Group

Once you have established your users' needs, you will need to establish a small user group to pilot OfficeTalk. Ideally this should be a group of users who work in the same department or area, and who need to communicate on a regular basis. This will allow you to judge the impact of OfficeTalk effectively. Once you have established your pilot group, create an evaluation criteria that will determine your targets for the evaluation. Nominate a user to co-ordinate feedback from the group and who can act as a single point of contact for the group.

## Step 3: Assessing OfficeTalk's Technical Requirements

OfficeTalk can run across any network that has the ability to share a DOS directory. Consult with your IT department and Sareen Software's Technical Support team about the best solutions. You should consider the type of network, operating system, number of users and whether there are any other Btrieve applications on your network.

## Step 4: Install and Implement OfficeTalk across your Pilot Group

Co-ordinate with your IT department to find the most suitable time to implement OfficeTalk. You should choose a time that will cause the minimum amount of disruption to your pilot group. Avoid implementing OfficeTalk in stages, as it will result in longer period of time before you get any valuable feedback from your pilot group. Establish an OfficeTalk bulletin board to co-ordinate your users' feedback.

Once you have installed OfficeTalk, you should decide how much training you need to give the pilot group. This will depend on the evaluation criteria you have agreed on in Step 2. If you want to test how quickly your users can get to grips with OfficeTalk, present it to your pilot group with the minimum of training. However, if you want to view the potential organisational and communication benefits of OfficeTalk, give your users the appropriate training. Consult Sareen Software's Support team on the best course of action.

### Step 5: First Week Discussion Meeting

After the first week of implementation, hold a meeting to discuss how the evaluation is progressing. Extract information from your OfficeTalk bulletin board to create an agenda and book the meeting using OfficeTalk. Areas you may wish to discuss might be OfficeTalk's usability, how easily your users adopted OfficeTalk, the features they used and what benefit these features brought. You should also discuss which features were not used and the reasons for them not being used.

By the end of the meeting you should be able to gauge OfficeTalk's initial impact on your pilot group. Based on the conclusions of the meeting you should create a timetable for the rest of the evaluation. This should include revised targets for the evaluation, future discussion meetings and an evaluation end date. Project Mode in OfficeTalk can be used to create such a timetable.

If the initial trial was judged to be a success you may wish to expand the pilot group to include users from other departments. Any technical queries or problems that were raised during the meeting, and that cannot be resolved internally, should be directed to Sareen Software's Technical Support department.

### Step 6: Subsequent Meetings

Depending on the results of previous meetings, you should use these meetings to resolve any questions or problems that have arisen during the week. Once you have finished your evaluation process and you decide to purchase OfficeTalk you should move onto Step 7.

### Step 7: Purchasing OfficeTalk

Once you have decided to purchase OfficeTalk, organise a meeting which will include all the people involved in implementing OfficeTalk across your workgroup/company. This may include representatives from the IT department, purchasing department, departmental heads, senior management and any other departments who will be involved in the purchase and implementation of OfficeTalk. Use this meeting to explain the impact and benefits of implementing OfficeTalk.

You should also use this meeting to decide the best way to implement OfficeTalk throughout your department/company, the timescale, and whether training is to be provided internally by your own staff or by one of Sareen Software's trainers. The recommended timescale is 30-40 days.