



Oak Engage Service Definition

G-Cloud 15

2026

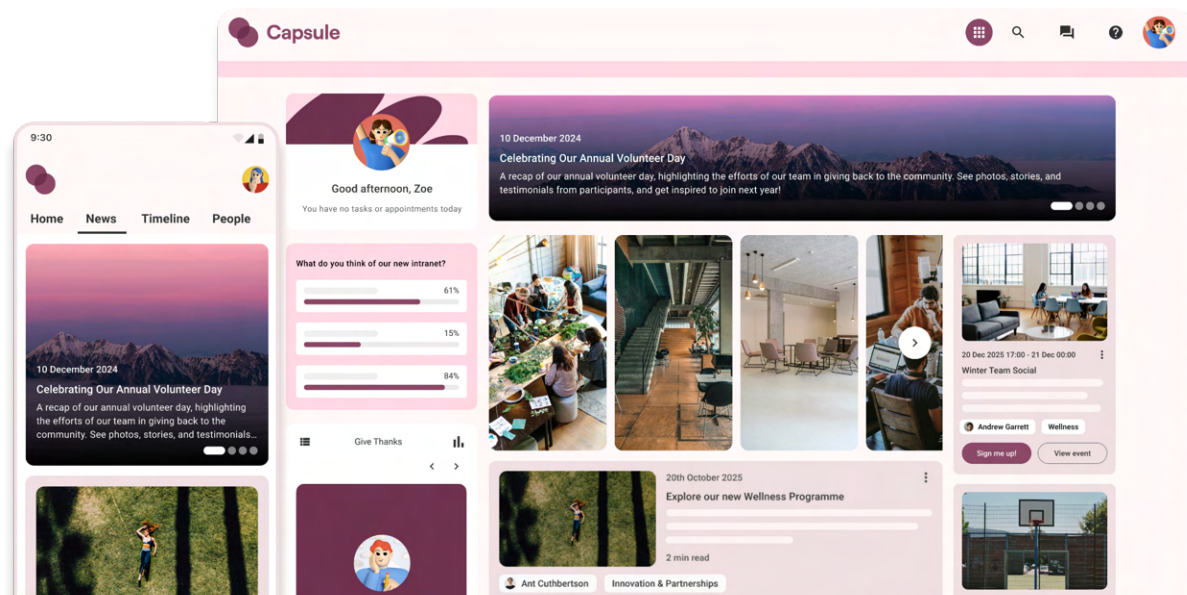
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1. Service Summary

Oak Engage is a **cloud-based employee engagement, intranet and internal communications tool** designed for organisations with large, complex and distributed workforces. The service enables organisations to **reach every colleague, improve engagement, support operational efficiency, and meet governance and compliance requirements** through a secure, mobile-first digital workplace.

Oak Engage is delivered as a **fully managed Software-as-a-Service (SaaS)** solution hosted on **Microsoft Azure**, with integrated implementation, training, customer success and 24/7 support services delivered entirely in-house by Oak.



2. Supplier Information

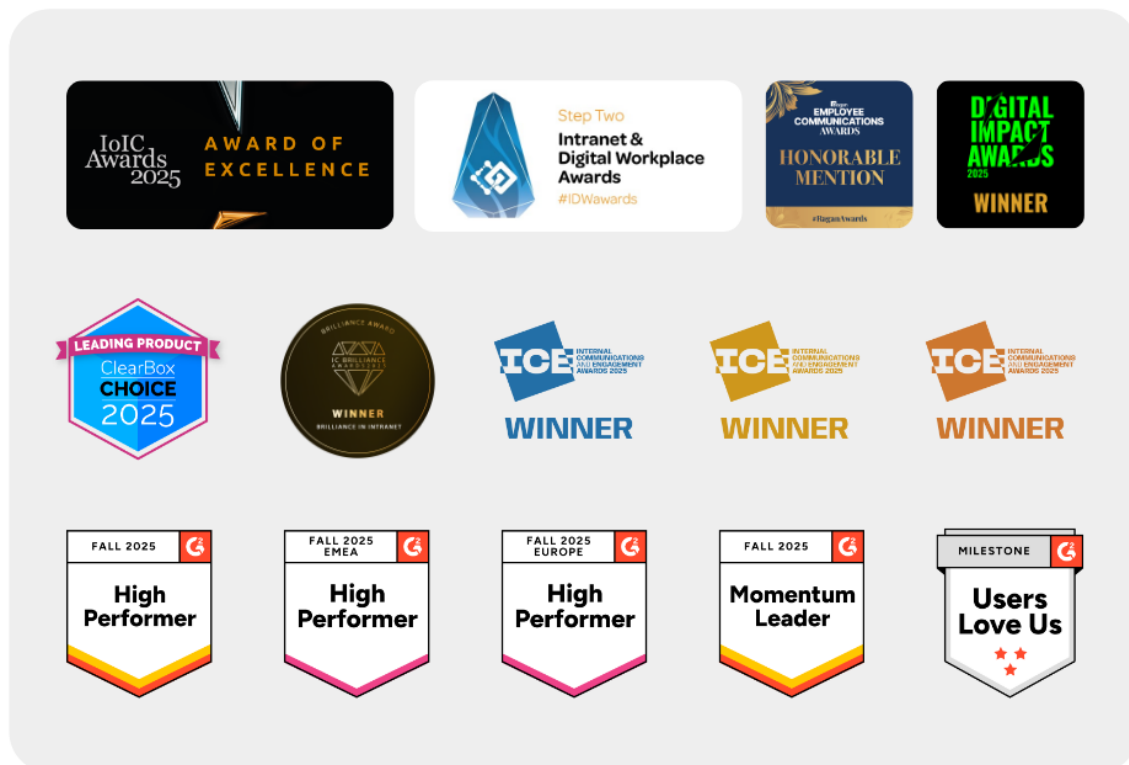
Supplier name: Oak Engage Limited (www.oak.com)

Company registration number: 03734477

Founded: 1999

Delivery model: Fully in-house (no subcontracting)

Oak Engage has over 25 years' experience delivering digital workplace and communication services to organisations with frontline, deskless and operational workforces, supporting engagement, compliance and organisational performance at scale.



3. Benefits & Outcomes Summary

Oak Engage delivers measurable benefits across **communication effectiveness, employee engagement, operational efficiency, compliance, and insights**. The service is designed to support public sector organisations in reaching dispersed workforces, reducing operational friction, and delivering value through clear metrics.

Improved Communication Reach and Effectiveness

Oak Engage ensures that important messages reach the intended audience through targeted, mobile-first delivery and intelligent segmentation.

Outcomes:

- Increased reach of critical communications
- Reduced reliance on email and informal channels
- Faster dissemination of operational and policy updates

Metrics: open/read rates, mandatory read completion, reduction in missed communications

Higher Employee Engagement

Two-way communication, recognition and feedback tools support a more engaged and inclusive workforce. Find out how we helped **Natwest hit 99% monthly engagement** [here](#).

Outcomes:

- Increased employee participation and interaction
- Improved inclusion across roles and locations
- Stronger organisational culture and alignment

Metrics: engagement actions, survey response rates, engagement scores

Increased Operational Efficiency

Oak Engage reduces time spent searching for information and managing manual communication processes. More detail on how we achieved a **40% reduction in new starter drop outs for Burger King** can be found [here](#).

Outcomes:

- Faster access to accurate information
- Reduced administrative burden on HR, communications and operations
- Streamlined workflows and approvals

Metrics: time-to-information, reduction in duplicate queries, time saved on content creation

Stronger Governance and Compliance

Built-in controls support regulatory and internal compliance requirements.

Outcomes:

- Improved assurance that critical information has been received
- Reduced audit and compliance risk
- Consistent document control

Indicative metrics: acknowledgement rates, audit findings, document accuracy

Better Insight and Evidence of Value

Real-time dashboards and AI-generated insights support evidence-based decision-making.

Outcomes:

- Clear visibility of engagement and adoption
- Ability to demonstrate ROI
- Continuous improvement driven by insight

Indicative metrics: active usage trends, engagement by audience, leadership reporting quality.

4. Service Scope

Oak Engage supports:

- Internal communications and campaigns
- Employee engagement and collaboration
- Knowledge management and document control
- Frontline and deskless workforce enablement
- Compliance communications and governance
- Insight, analytics and reporting
- Secure integration with enterprise systems

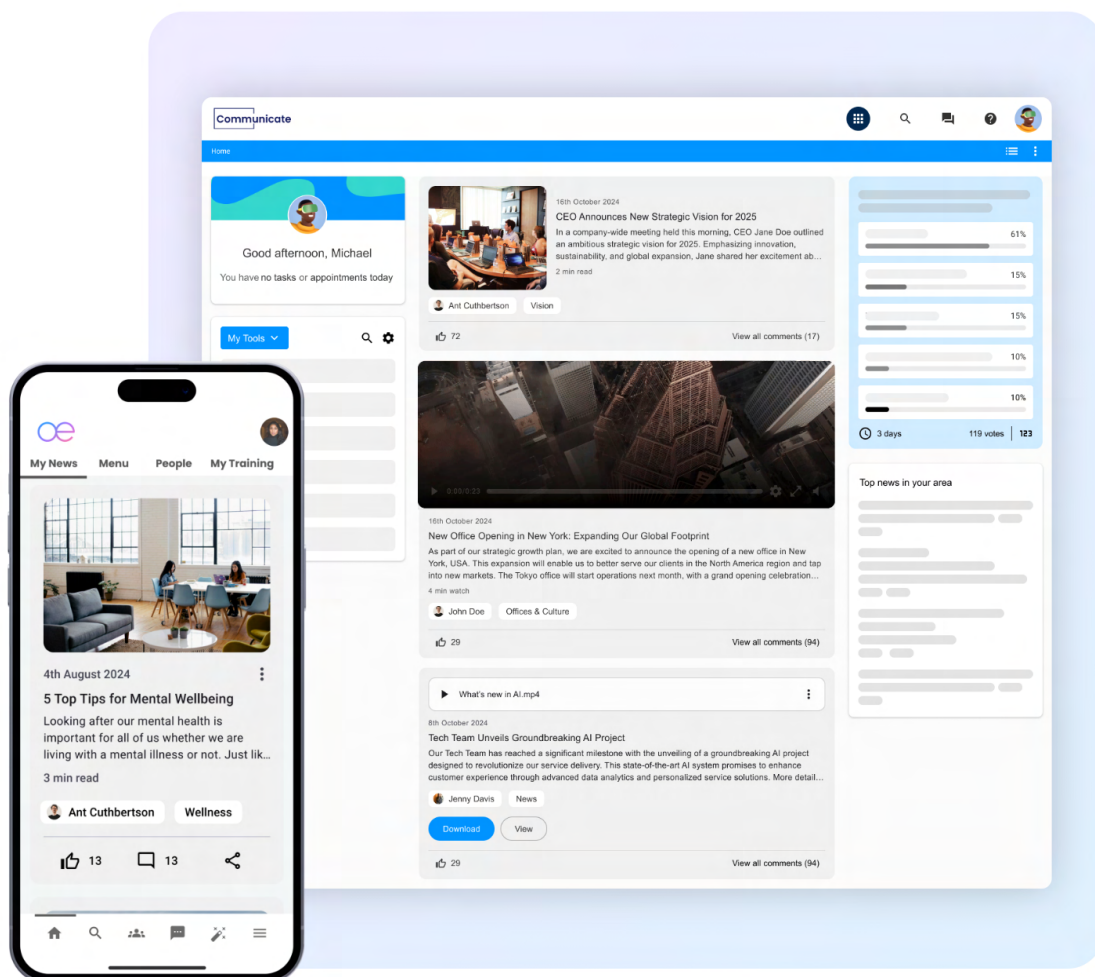
The service is suitable for **public sector organisations**, including central government, local authorities, NHS bodies and education providers.

5. Service Features and Capability Model

Oak Engage is delivered through a **tiered capability model**, providing a complete, end-to-end digital workplace service. The product has the following feature tiers:

- **Engage and Unite Your Talent**
- **Translate Comms into Connection**
- **Turbocharge People Operations**
- **Harness AI**
- **Integrate Seamlessly**

All customers receive the **full capability** as part of the Oak Engage service.



Content Management System

The CMS is the core publishing and governance engine of the intranet, enabling structured, scalable, and compliant content delivery across the organisation. It is designed to support both central communications teams and distributed content creators.

Content Creation & Editing – The CMS includes a flexible content editor with support for news articles, community blogs, events, policies, and multi-column page layouts. Content editor restrictions allow administrators to control who can create, edit, or publish content, ensuring consistency and quality.

Homepage Builder, Audience Targeting & Scheduling – Editors can build personalised homepages using drag-and-drop components, with content targeted to specific audiences and scheduled in advance. This ensures employees see relevant information at the right time without being overloaded.

Navigation & Structure – Features such as mega menus, area menus, site-level menu management, site icons, and footers provide intuitive navigation across the intranet. Core themes and advanced branding ensure alignment with organisational identity.

Content Types & Libraries – The CMS supports news articles, events, media libraries, blank or custom pages, and community blogs. A central media library ensures assets are reusable, version-controlled, and easy to manage.

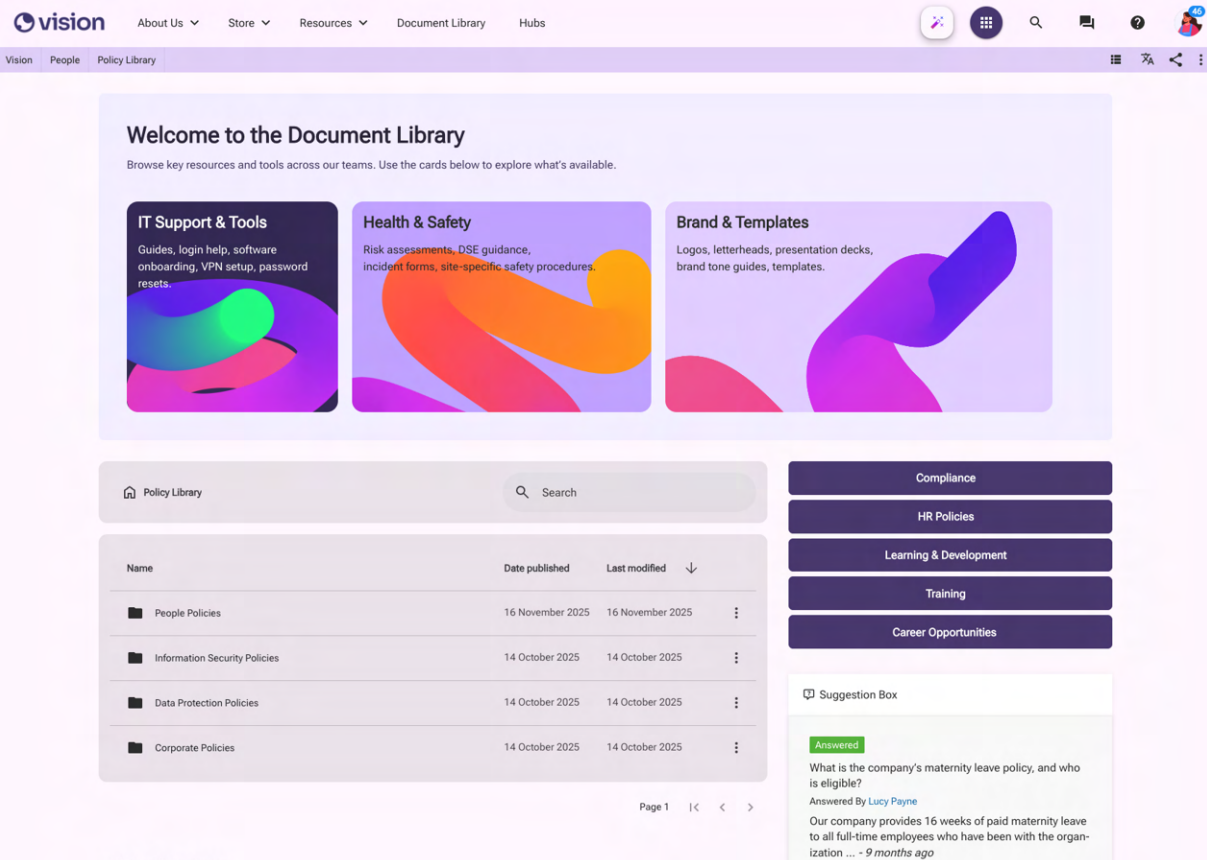
Discovery & Engagement – Built-in search, trending content, topics, and “time to read” indicators help employees quickly find and engage with relevant information. Notifications on desktop and mobile apps ensure important updates are not missed.

Compliance & Governance – Oak brings together compliance activities in one place with, policies library and workflows to support regulated environments. Features such as mandatory reads, audit trails, and review cycles help organisations meet governance and regulatory requirements.

Accessibility & Localisation – The CMS supports standard languages, auto-translation, and accessibility best practices, ensuring content is inclusive and usable across diverse workforces.

Breaking News – The Breaking News feature enables organisations to rapidly publish and distribute urgent or high-priority communications. Content published as Breaking News is displayed as a yellow ticker tape banner to ensure maximum visibility. This capability is particularly suited to crisis communications and key business updates.

Extranet – Extranet allows you to give external partners and suppliers a tailored experience within your site to securely share information and updates.



The screenshot displays the 'Vision' Document Library interface. At the top, a navigation bar includes the 'vision' logo and links for 'About Us', 'Store', 'Resources', 'Document Library', and 'Hubs'. A secondary bar shows 'Vision', 'People', and 'Policy Library'. The main content area is titled 'Welcome to the Document Library' and provides a brief instruction. Below this, three cards represent different resource categories: 'IT Support & Tools' (guides, login help, software onboarding, VPN setup, password resets), 'Health & Safety' (risk assessments, DSE guidance, incident forms, site-specific safety procedures), and 'Brand & Templates' (logos, letterheads, presentation decks, brand tone guides, templates). A 'Policy Library' section features a search bar and a table of policies. To the right of the table are buttons for 'Compliance', 'HR Policies', 'Learning & Development', 'Training', and 'Career Opportunities'. At the bottom right, a 'Suggestion Box' shows a question about the company's maternity leave policy, answered by Lucy Payne, with a response stating 16 weeks of paid leave for full-time employees.

Welcome to the Document Library
Browse key resources and tools across our teams. Use the cards below to explore what's available.

IT Support & Tools
Guides, login help, software onboarding, VPN setup, password resets.

Health & Safety
Risk assessments, DSE guidance, incident forms, site-specific safety procedures.

Brand & Templates
Logos, letterheads, presentation decks, brand tone guides, templates.

Policy Library

Name	Date published	Last modified	
People Policies	16 November 2025	16 November 2025	
Information Security Policies	14 October 2025	14 October 2025	
Data Protection Policies	14 October 2025	14 October 2025	
Corporate Policies	14 October 2025	14 October 2025	

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Compliance

HR Policies

Learning & Development

Training

Career Opportunities

Suggestion Box

Answered

What is the company's maternity leave policy, and who is eligible?

Answered By **Lucy Payne**

Our company provides 16 weeks of paid maternity leave to all full-time employees who have been with the organization ... - 9 months ago

Engage and Unite Your Talent

Mobile-first intranet

Oak provides a responsive intranet accessible via desktop browsers and native iOS and Android mobile applications. This ensures all users, including deskless and frontline staff, can securely access information regardless of location or device.

Timeline

The Timeline provides a social, real-time activity feed that aggregates organisational updates, colleague posts, and engagement activity. It encourages two-way communication by allowing users to react, comment, and contribute content, fostering a sense of community and shared purpose across the organisation.

Recognition & Awards

Recognition & Awards applets allows employees and managers to publicly recognise achievements aligned to organisational values. Colleagues can nominate peers, celebrate milestones, and reinforce positive behaviours, strengthening culture and morale. While the Recognition applet is designed for a “quick thanks”, the Awards applet allows organisations to run more formal “employee of the year” type initiatives using a STAR based model.

Quick Polls

Quick Polls provide a lightweight mechanism for gathering instant feedback from targeted audiences. Results are available in real time, enabling leaders to quickly gauge sentiment and support rapid decision-making.

Hubs

Hubs are dedicated community spaces that bring together employees around shared interests, departments, or initiatives. They support knowledge sharing, discussion, and collaboration beyond formal organisational structures.

Conversation Management

Conversation Management tools enable moderation, expert comment highlighting, and content controls to ensure discussions remain respectful, compliant, and constructive. This creates safe spaces for open dialogue while maintaining governance.

Mobile App

The Mobile App delivers full intranet functionality on personal devices, ensuring equitable access for deskless and frontline workers. The app is branded to the organisation and supports secure access, offline use, and push notifications.

Short Form Video (Moments)

Moments enables the creation and consumption of engaging, bite-sized video content in a familiar, social-style format. This supports high engagement levels, particularly for deskless and frontline employees, and is optimised for mobile consumption.



Translate Comms into Connection

Teams App

The Microsoft Teams App embeds the intranet directly into Teams, allowing employees to consume, react to, and comment on content without leaving their primary collaboration tool. This reduces friction and increases engagement.

Notifications and Mandatory Reads

Targeted notifications and mandatory read confirmations ensure critical communications are seen and acknowledged. Administrators can track compliance and demonstrate that key messages have reached the intended audience.

Analytics & Success Management

Analytics dashboards provide insight into engagement, reach, and content performance. These insights enable continuous optimisation of communication strategies and demonstrate ROI.

Surveys

Oak's Process application supports structured employee feedback, from pulse checks to annual engagement surveys. Distribution can be targeted, and results analysed to inform organisational decisions.

Dynamic Groups

Dynamic Groups automatically segment employees based on profile data such as role or location. Groups update in real time, enabling accurate, scalable targeting without manual administration.

Email Channel

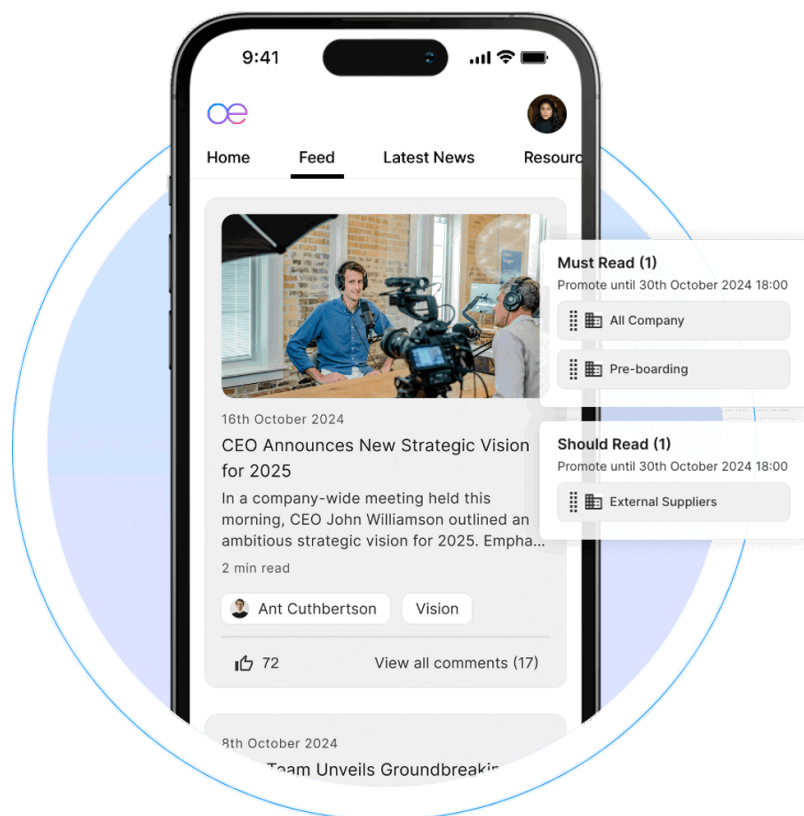
The Email Channel extends intranet communications beyond the platform by delivering targeted summaries and alerts to employee inboxes. This ensures reach even for infrequent users.

Planner

Planner provides a centralised content calendar for planning, scheduling, and coordinating communications. It supports collaboration across teams and visibility of upcoming activity.*

News Roundup & Smart Feed

Automated news roundups and personalised smart feeds curate content for each employee based on role, location, and preferences. This reduces noise while ensuring relevance.



Turbocharge People Operations

SSO Connections

Single Sign-On (SSO) provides secure, one-click access using existing identity providers. This reduces password fatigue and simplifies user management.

App Launcher

The App Launcher offers centralised access to enterprise applications and tools from within the intranet. Users can personalise shortcuts to the systems they use most.

Meet the Team

Meet the Team features introduce colleagues through profiles and team pages, supporting connection and collaboration across locations and departments.

Process

Process tools enable the creation of structured workflows and forms for operational tasks such as onboarding or approvals. This standardises processes and improves efficiency.

Org Chart and Directory

The organisational chart and people directory provide a searchable view of reporting structures, roles, and contact details, improving transparency and accessibility.

Expenses

Expenses functionality provides guidance, forms, and links for expense management processes, centralising information and reducing administrative overhead.

Absences

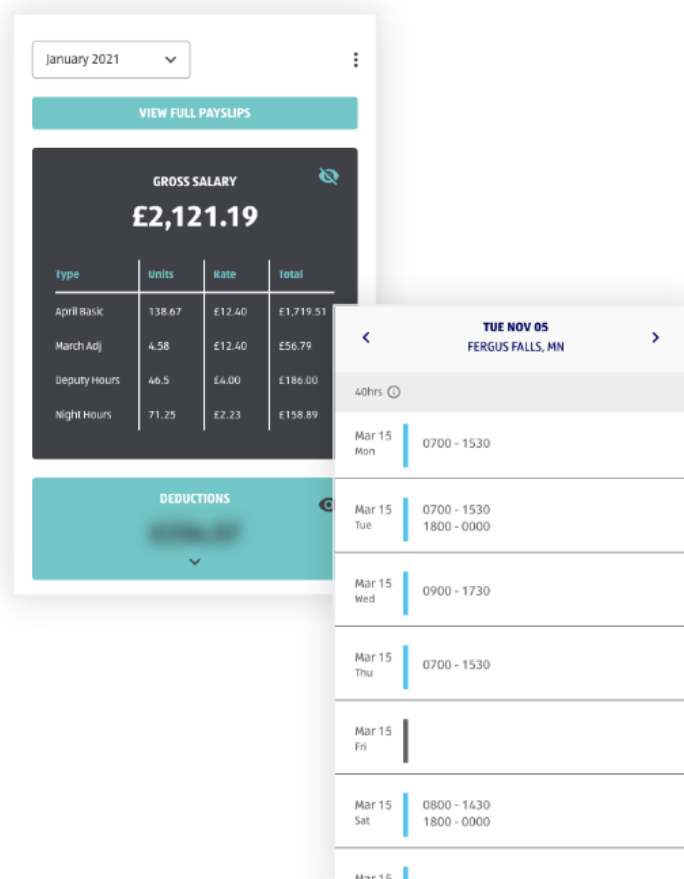
Absences support visibility of leave and requests, helping employees and managers manage availability consistently.

Service Desk & People Case Management

Oak's Service Desk provides a secure, structured way to raise and track HR or support cases. It creates a single source of truth for employee queries and resolutions.

Payslip & Rota Integration

Payslip and rota integration allows employees to securely access payroll and shift information from within the intranet, improving convenience and trust.



Harness AI

Aria Content

Aria Content uses AI to assist with creating policies, news articles, and updates from simple prompts. This reduces publishing time while maintaining editorial control.

AI Search

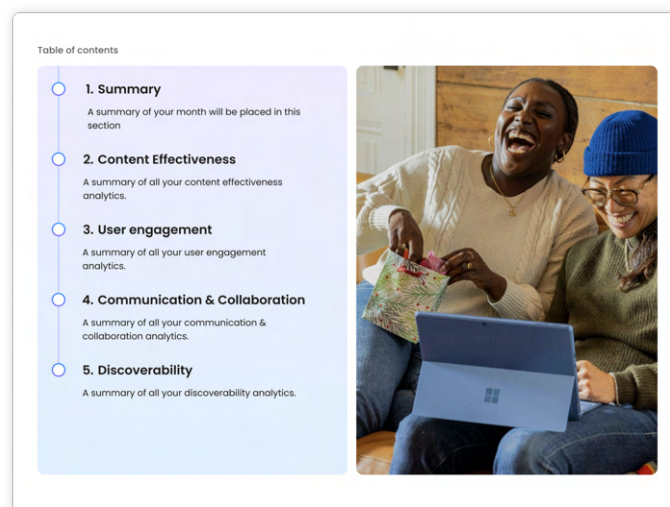
AI Search delivers intelligent, federated search across intranet content and integrated systems, summarising results and highlighting the most relevant information.

Auto Translations and Subtitles

Auto Translations and Subtitles automatically translate content into multiple languages and generate captions for video, ensuring inclusive communication, improved accessibility, and better comprehension for global or multilingual audiences.

AI Insights Report

AI Insights Reports provide automated, monthly analysis of engagement data with actionable recommendations, supporting continuous improvement.



Integrate Seamlessly

M365 and SharePoint Integrations

Oak allows you to integrate with the Microsoft 365 suite while directory browsing enables employees to navigate SharePoint directories directly from the intranet, maintaining a single user experience without duplicating content.

Federated Search

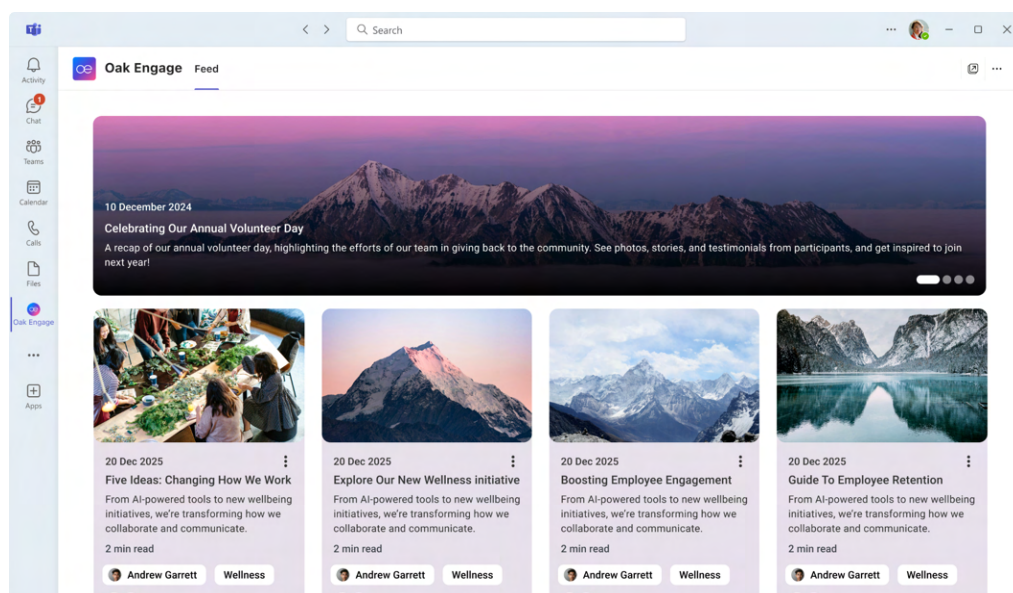
Unified search across Oak, SharePoint, OneDrive, and Google Drive, enabling employees to quickly find information from a single search bar, reducing wasted time and improving operational efficiency.

SSO Authentication

Single Sign-On (SSO) provides secure, one-click access using existing identity providers. This reduces password fatigue and simplifies user management.

Microsoft Teams App

The Microsoft Teams integration ensures the intranet complements existing collaboration tools, embedding news feeds, content, and engagement features directly into Teams.



Add Ons

Additional costs apply as outlined in Pricing Document

Dev Centre and API Access

The Dev Centre and API Access capability enables organisations to extend and customise the intranet by securely integrating with internal systems and third-party applications. Through documented APIs, developers can programmatically read and write data such as users, groups, content, and engagement signals, supporting automation and system interoperability. This allows organisations to build bespoke workflows, synchronise data with HR, finance, or operational platforms, and future-proof their digital workplace without reliance on proprietary tooling.

App Store Presence

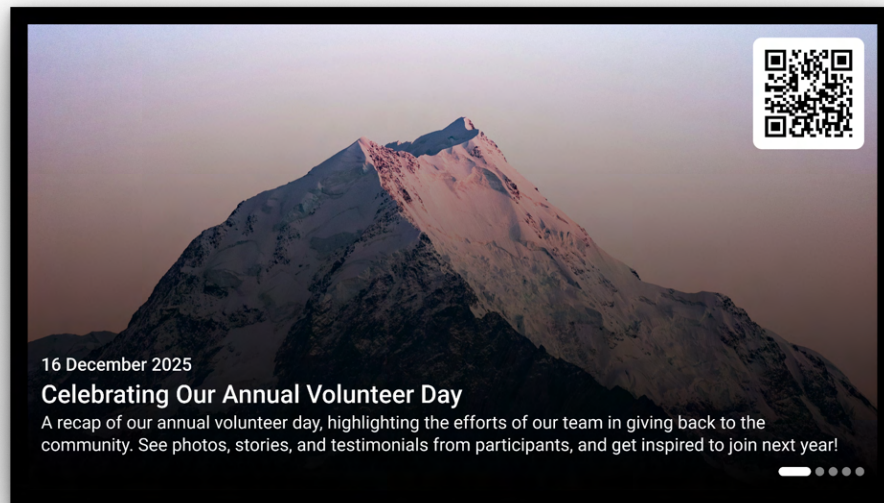
App Store presence uses a branded app icon, bespoke site URL, and deep linking to create a recognizable, trustworthy, and cohesive user experience. Together, these elements build a sense of identity, improve visibility and recall, encourage engagement, and ensure consistent communication, while deep linking supports seamless onboarding and reinforces culture from first touch to ongoing use.

Messenger

Messenger is a secure, enterprise-grade instant messaging capability embedded directly within the intranet platform. It enables real-time, one-to-one and group conversations between colleagues, supporting fast, informal communication while remaining compliant and auditable. Designed as a controlled alternative to consumer messaging tools, Messenger keeps conversations within the organisation's digital workplace, ensuring data security, visibility, and alignment with internal communication policies, while improving collaboration for frontline and desk-based employees.

Digital Signage

Digital signage extends internal communications by showcasing real-time news, updates, and targeted campaigns across physical locations like offices and communal spaces.



6. Service Management Definition

Overview

The service provides a structured, secure and outcomes-focused approach to the delivery, operation and continuous improvement of a cloud-hosted employee engagement and communications platform for public sector organisations. The service is designed to meet public sector requirements for governance, transparency, risk management, service continuity and value for money.

Delivery follows a proven implementation methodology combined with agile practices, ensuring services are deployed efficiently, risks are actively managed, and users are supported throughout the service lifecycle.

Implementation and Onboarding

Delivery Approach

The service is implemented using a **structured, agile delivery approach** designed to meet public sector expectations for transparency, control, and risk management. The approach combines defined governance and documentation with iterative configuration and regular stakeholder engagement.

Implementation is delivered in partnership with the customer, ensuring organisational objectives, user needs, accessibility considerations, and internal governance requirements are understood and embedded from the outset.

Key principles of the delivery approach include:

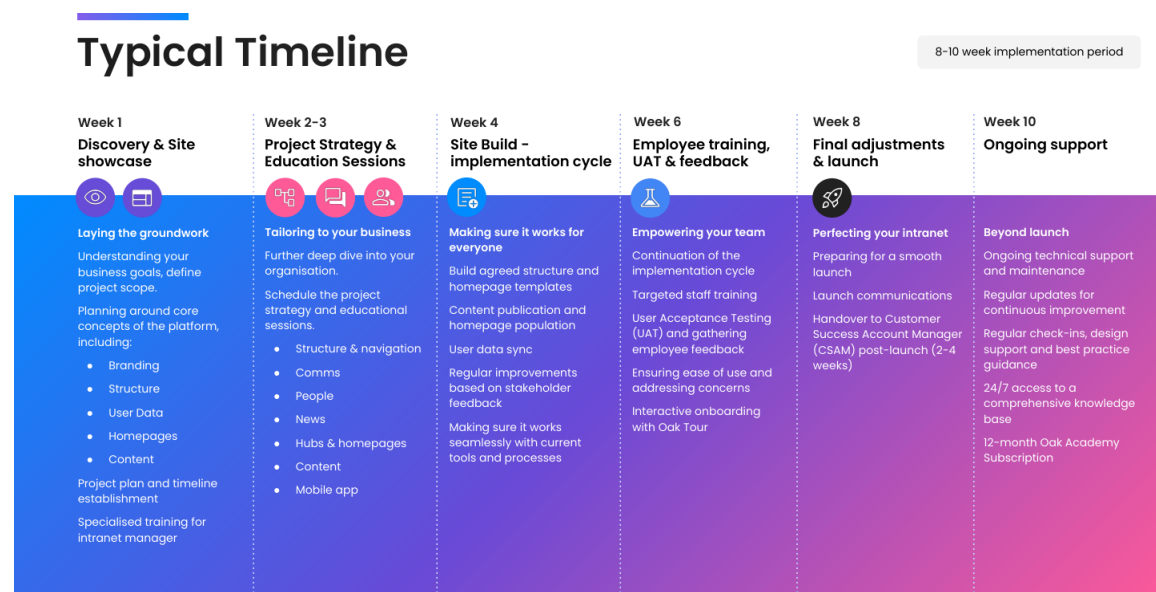
- **Clear governance and accountability**, with a named Implementation Manager acting as the primary point of contact
- **Agile, iterative delivery**, allowing feedback to be incorporated at each stage
- **Early risk identification and mitigation**, supported by a maintained risk register
- **Regular checkpoints and progress reporting**, ensuring visibility and assurance throughout delivery

- **Knowledge transfer and enablement**, ensuring internal teams are prepared to manage the service post-launch

This approach ensures predictable delivery, reduces implementation risk, and supports adoption across complex public sector environments.

Implementation Phases

Implementation typically takes place over **8–10 weeks**, depending on scope and organisational complexity, and is delivered through the following phased model.



Phase 1: Discovery

This phase establishes a clear foundation for delivery by aligning the service to organisational objectives and governance requirements.

Activities include:

- Project initiation and confirmation of scope
- Stakeholder identification and engagement planning
- Discovery sessions covering:
 - Organisational structure and user groups
 - Communications objectives and content strategy
 - Governance, approval workflows and data considerations
- Agreement of delivery roadmap, milestones, and success criteria

Outputs from this phase include a confirmed project plan, agreed priorities, and shared understanding of risks and dependencies

Phase 2: Strategy and Design

During this phase, the service is shaped to meet user needs while aligning with organisational standards and public sector best practice.

Activities include:

- Information architecture and navigation design
- Content structure and homepage planning
- Branding and visual configuration (where required)
- Definition of user roles, permissions, and access controls
- Strategy sessions covering:
 - Communications and engagement models
 - News and content governance
 - Mobile and accessibility considerations

This phase ensures the service is usable, accessible, and aligned to internal policies before build commences.

Phase 3: Build and Configuration

The service is configured iteratively, with regular reviews to ensure requirements are met.

Activities include:

- Platform configuration based on agreed designs
- Migration of any existing content where possible / required (CSV format)
- User data setup and integration activity (e.g. SSO where applicable)
- Content population and template setup
- Incremental reviews with stakeholders
- Adjustments based on feedback and testing

Regular checkpoints are held to review progress, manage risks, and resolve issues promptly.

Phase 4: Testing, Training and Readiness

This phase ensures the service is ready for operational use and that users are confident and supported.

Activities include:

- User Acceptance Testing (UAT)
- Issue resolution and final refinements
- Role-based training for administrators and content owners
- End-user onboarding support and guidance
- Pre-launch checks and readiness assessment

Training is delivered through a mix of live sessions and self-service resources to support long-term capability building.

Phase 5: Launch and Transition to Live Service

The final phase focuses on a controlled and well-communicated launch.

Activities include:

- Go-live support and monitoring
- Launch communications planning support
- Formal handover to the Customer Success Manager
- Post-launch review and stabilisation period

This ensures continuity of service and a smooth transition into business-as-usual operations

Post-Implementation Support

Following launch, the service moves into ongoing service management and continuous improvement, with dedicated support and customer success resources to ensure sustained value and adoption.

Governance and Risk Management

The service is delivered using strong governance and proactive risk management practices aligned with public sector expectations.

This includes:

- A **documented project plan and decision log**
- A **shared risk register**, reviewed regularly
- Clear scope definition and change control
- Active mitigation of key risks, including:
 - Delivery and timeline risks
 - Resource availability
 - Technical and integration risks
 - User adoption and change management risks

These controls ensure transparency, accountability and predictable delivery throughout the implementation and operational phases.

Service Management and Customer Success

Following launch, the service transitions seamlessly into an ongoing support and service management phase, led by a **dedicated Customer Success Manager (CSM)**.

The Customer Success service includes:

- Regular service and business reviews at an agreed cadence
- Ongoing engagement monitoring and performance insights
- Advice on best practice, accessibility, and content optimisation
- Support for continuous improvement initiatives with support from the Customer Engagement team.
- Collaborative projects to support evolving organisational needs

This ensures the service continues to deliver measurable value, high adoption, and sustained engagement over time.

Training and Knowledge Transfer

The service includes comprehensive training and knowledge transfer to ensure public sector teams are self-sufficient and confident in operating the service.

Training options include:

- Role-based onboarding sessions during implementation

- Live online workshops and webinars
- Access to a structured learning management system (Oak Academy)
- Self-service knowledge base resources
- Bespoke training sessions tailored to organisational requirements

This blended learning approach supports long-term capability building and reduces dependency on supplier intervention.

Support Services and Service Levels

The service includes a fully managed, in-house support function with clearly defined service levels.

Support features include:

- **24/7 support for critical (P1) incidents**
- Support portal with ticket tracking and live chat
- Email and telephone support options
- Dedicated escalation routes via the Customer Success Manager
- No third-party outsourcing of support services

Service performance includes:

- Average response time: **1.5 hours**
- Critical incident response: **~25 minutes**
- Contracted service availability: **99.9% uptime**
- Hosting on Microsoft Azure with resilient primary and secondary data centres

This model ensures service resilience, rapid incident response, and continuity aligned with public sector operational requirements

Continuous Improvement

The service is designed for continuous improvement throughout the contract term. This includes:

- Regular performance reviews and engagement reporting
- Annual site audits and recommendations
- Ongoing platform updates delivered through standard release cycles

- Optional consultancy support for enhancements or re-designs

This ensures the service remains compliant, effective and aligned to changing organisational needs over time

7. Security, Compliance & Data Handling

Oak is a highly secure multi-tenant software as a service platform hosted on Azure and integrated to Power BI. We can connect to on-prem systems using our proprietary tenant secure OIS technology for AD user and group sync single sign-on SharePoint and HR people data as well as enabling data synchronisation for payroll and rotas through automated uploads.

We use the OAuth2 and SAML standards for authentication, and integrate with popular federated identity platforms such as OKTA and AzureAD as well as working with all major office productivity email and calendaring systems.

You can extend Oak with modules built in the Oak Dev Center application using the API to access the Oak Service (See Extending Oak White Paper which also includes information about our integrations).

Architecture & Multi-Tenancy

Oak is a multi-tenant application, and tenant isolation is baked in at the lowest level of the architecture ensuring that client data on shared services is always completely isolated. In cases where customers have specific security needs, we can provide a physically isolated set of servers..

Data Protection

We comply with the Data Protection Act 2018 and the General Data Protection Regulation (EU) 2016/679.

We cover these matters in our standard service agreement. For platinum customers we are open to discussing specific customer requirements with a view to meeting additional compliance obligations.

ISO 27001

Microsoft's Azure platform, which is certified to ISO27001 (see <https://www.microsoft.com/en-us/trustcenter/compliance/iso-iec-27001>).

Oak complies with the requirements of ISO 27001 and forms part of the Company's Information Security Management System (ISMS). We are externally audited and demonstrate Oak's commitment to the ISO 27001 framework.

Information Security is covered in our employee handbook which forms part of our contracts of employment and is supported by ongoing Information Security Training.

Cyber Essentials Security+

Oak is fully compliant with the requirements of Cyber Essentials Plus, as evidenced by our current certification, which was awarded following a rigorous assessment conducted by an external auditor. This certification underscores our commitment to maintaining robust cybersecurity measures across our corporate infrastructure.

To ensure adherence to these standards, all elements of our corporate infrastructure are governed by comprehensive policies and meticulously applied protections. These measures are designed to guarantee secure access to corporate data, thereby safeguarding our operations and the information entrusted to us by our clients.

Employee Vetting

We conduct comprehensive Disclosure and Barring Service (DBS) checks on all personnel who access client data. This rigorous screening ensures all employees uphold our high standards of integrity and professionalism, crucial for protecting the confidentiality, integrity, and security of sensitive information. Oak also has a core group of employees who are checked at NPPV Level 2 in order to comply with increased checks required by some organisations.

Employee Security Training

Oak employs a proactive approach to cybersecurity through continuous training initiatives. We utilise KnowBe4's automated training platform, which simulates cyberattacks and assesses employee responses. This system allows us to enhance our team's readiness against real-world threats by grading their reactions and providing targeted feedback to improve security awareness and response strategies.

Data Centres

Microsoft's Azure data centres are strategically located around the world to ensure robust global coverage and low-latency access for users. Each data centre is paired with another in the same region and used for synchronised backups and disaster recovery failover procedures.

United Kingdom South – London, UK (paired with Cardiff, UK)

The Azure data centre in London, UK, is a critical hub for Microsoft's cloud services in Europe. It offers a range of services including compute, storage, databases, and AI capabilities. London's Azure data centre benefits from the city's robust infrastructure, proximity to financial and commercial institutions, and adherence to stringent data protection regulations, making it an ideal location for businesses requiring compliance with GDPR and other data privacy laws.

North Europe – Dublin, Ireland (paired with Amsterdam, Holland)

Dublin, Ireland, houses another key Azure data centre that serves as a significant node for Microsoft's cloud network in Europe. Known for its cool climate, which is advantageous for energy-efficient data centre operations, Dublin provides extensive cloud services to businesses across the continent. This facility supports a wide array of applications and workloads, offering reliable, scalable, and secure cloud solutions. Dublin's Azure data centre is also a part of Microsoft's commitment

to sustainability, leveraging renewable energy sources to minimise its carbon footprint.

Data Access

Access to customer data for support services is undertaken using a client-specific and dedicated support account. The password to access this account has to be regenerated and issued to an individual each time before the account can be used, and the provision of the password to an individual is logged, maintaining traceability and accountability for the shared user account.

The Oak Operations Team manages the data centres and all aspects of the service. The accounts Oak Operations uses are protected using complex passwords and mandatory two-factor authentication.

Oak Customer Success and Oak Operations teams are trained in data security and data protection compliance to;

- protect the confidentiality, availability and integrity of customer data
- implement, maintain and improve an ISMS that is ISO 27001 compliant
- comply with all applicable laws, regulations and contractual obligations

We follow the principle of least privilege so that our teams are given the minimum levels of access required to perform their role responsibilities. We allocate privilege rights (e.g. local administrator, domain administrator, super-user, root access) to teams, based on role, which shall be restricted and controlled, and authorised jointly by the relevant information owner and IT Manager.

Data Backup and Recovery – Daily Backups

We perform continuous backups of your data using a full weekly backup, daily differentials and 10-minute transaction logs. These backups are securely retained for seven days. This daily backup routine ensures that you can recover your data from any point within the last week, providing a robust safety net against data loss.

Data Encryption at Rest and in Transit

All backup data is encrypted at rest using at least 256-bit AES encryption, meaning your information is protected using advanced encryption techniques when stored. This ensures that your data remains confidential and secure from unauthorised access.

Furthermore, the Oak application is delivered over an SSL/TLS encrypted connection, which is the only way data can be consumed. This encryption protocol provides a secure channel for data transmission, protecting your information from potential eavesdropping or tampering during transit.

Our APIs are also secured by SSL/TLS, ensuring that any data exchanged between your applications and our servers is encrypted and secure. Additionally, our APIs are protected by industry-standard authentication mechanisms, adding an extra layer of security to prevent unauthorised access and ensure that only authenticated users can interact with our services.

Secondary Data Centre Copy

To further enhance data security, a copy of your data is transferred to a secondary, physically separate data centre within the same territory. This transfer occurs at least once an hour, providing an additional layer of protection against data loss due to site-specific incidents.

Backup Recovery Validation

We validate our backup recovery process **every** month. This routine testing ensures that we can reliably restore your data in case of an emergency, giving you peace of mind that your backups are effective and dependable.

Business Continuity & Recovery

If a disaster affects the Microsoft Azure platform, we will promptly notify designated contacts within your organisation. We will provide detailed information about the event, the anticipated

The Oak service can be redeployed and the restoration of customer data (if required) can be initiated within two hours of the Azure platform being restored.

We will restore client data in batches, prioritising based on the timing of the outage and your business hours. We will provide an estimated timeline for when your site will be recovered and available for use. Should there be any changes to this timeline due to other ongoing restorations, we will keep you informed and updated.

Microsoft Azure's business continuity capabilities are certified under ISO 22301, which ensures a robust framework for maintaining and restoring business operations. Details on this certification can be found [here](#). These capabilities are included in our service agreement with Microsoft Azure.

In the rare case that an Oak instance is compromised within an Azure data centre, we anticipate that the Oak platform will be fully operational within 24 hours. We aim to have all customers online within three days and complete data restoration within 1-7 days, depending on the volume and size of the data backups involved.

We conduct an annual review of our Business Continuity Plan (BCP) and perform tests on our disaster recovery procedures every six months to ensure effectiveness and readiness.

8. Termination & Exit

The buyer always retains full ownership of their data, and Oak Engage makes no claim to ownership of, or rights over, customer data at any time. Customer data is used solely for the purpose of delivering the contracted services and in accordance with agreed terms.

Upon termination of the service, the buyer's data is exported and provided to the client via secure blob storage. All exported files and data are made available through this secure mechanism to support retrieval in a controlled and reliable manner.

Customer data is securely destroyed after the agreed termination timeframe. This is achieved through the destruction of all storage resources and databases associated with the buyer's data, alongside the purging of all related caches, ensuring that data is no longer accessible or recoverable.

To support service transition, the platform is kept operational ("warm") for a minimum of 30 days following termination. This transition window allows for orderly handover and data access, with additional transition days available subject to an agreed fee.