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How connected are our sales reps to key sources of customer insights & product expertise	

How connected are our sales reps to key sources of customer insight & product expertise?

Increase customer focus

Rapid Insights

Collaboration Time Allocation¹ between key functions and sales regions

	n =	Product	Mktg	Legal	Region 1	Region 2	Region 3	
Product	47	45%	13%	21%	2%	7%	11%	<i>How to Read:</i> Product Management spends 11% of its overall collaboration time with sales reps assigned to Region 3
Marketing	115	9%	52%	20%	2%	11%	6%	
Legal	221	9%	13%	31%	13%	18%	16%	
Region 1	27	3%	14%	19%	61%	2%	2%	
Region 2	53	7%	18%	22%	2%	44%	7%	
Region 3	90	11%	10%	15%	2%	7%	56%	

Related Metrics			
# People Connected	Generated Workload	Generated Workload Received	Hours per Person

¹ Collaboration Hours – total time spent in meetings and sending / receiving emails that are returned by search query referenced. Rows in graphic sum to 100%, representing all collaboration for individuals at that row's brand

DISCOVER

Demographic and Confidential Information

172

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Module 1: Organizational Resilience Framework

Complete the Discover Microsoft Workplace Analytics module at aka.ms/discover-wpa

Summary

The Workplace Analytics app as part of **Viva Insights** is a **cloud-based solution** that uses the power of **Microsoft 365 collaboration data** for creating analysis about

- how your **organization spends its time**,
- the **ways people network**, and
- the **effectiveness of team collaboration**.

With the **Workplace Analytics features**, you can:

- See **business outcomes** and their related **research-based behavioural** insights that show **how things** get done in your organization starting with the **Home page**.
- Use the **Explore the stats**, **Explore in Power BI**, and **Plans** options for **more in-depth analysis** specific to **your organization's data**.
- Use the **Query designer's templates** and queries **to jump-start your analysis** and customize them for more **focused or in-depth analysis**.
- **Analyze a specific business process** with the *Business process analysis* feature.
- Compare metrics between groups with **the Peer analysis** feature.
- Select targeted change
 - Plans to **improve focus**,
 - **collaboration**,

- **wellbeing**, and
- **sales success**.
- Use the **Controls** pages to **validate uploaded data sources** and to **set up analyst settings**, system defaults, and privacy settings.
- **Privacy** is key.
 - Workplace Analytics only uses **header level metadata**.
 - **Attachments and text in the body of email and meetings** are never used. Furthermore, rights-managed, confidential, and private email and meetings are excluded altogether.

Now that you have completed this module, you should be able to:

- Identify how **Workplace Analytics** can help improve **collaboration** behaviours in your organization.
- **Recognize** the **sources of data** that are used in **Workplace Analytics**.
- **Navigate** and use the features in **Workplace Analytics**.
- **Understand tasks** and considerations for setting up Workplace Analytics and managing privacy.

Summary and knowledge check

The Workplace Analytics app as part of **Viva Insights** is a **cloud-based solution** that uses the power of **Microsoft 365 collaboration data** for creating analysis about

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- **Understand tasks** and considerations for setting up Workplace Analytics and managing privacy.

Knowledge Check

1. What are the **required** and **optional data sources** included in Workplace Analytics?
 - a. **M365** and HR Organizational data
2. where can **leaders go** to view **out-of-the-box insights** on important **business outcomes** in Workplace Analytics?
 - a. Home-page
3. **What type of data** does **Workplace Analytics use** within the **Microsoft 365 collaboration data**?
 - a. Header-level data

Check your knowledge

1. What are the required and optional data sources included in Workplace Analytics?

☒ Microsoft 365 and HR organizational data are required; CRM data is optional. ✓
 Correct. Microsoft 365 data and HR organizational data are required in Workplace Analytics; CRM data is optional.

☐ Microsoft 365 and CRM data are required; HR organizational data is optional.

☐ HR organizational and CRM data are required; Microsoft 365 data is optional.

2. Where can leaders go to view out-of-the-box insights on important business outcomes in Workplace Analytics?

☐ Query designer

☐ Peer analysis

☒ Home page ✓
 Correct. The Home page provides leaders with quick insights into research-based business outcomes.

3. What type of data does Workplace Analytics use within the Microsoft 365 collaboration data?

☐ Email attachments

☒ Header-level data ✓
 Correct. Workplace Analytics does not look at email body text.

☐ Body of emails

Watch video [Part 1: Sales Flow and Organizational Resilience](#)

Today we cover Organizational Resilience with Workplace Analytics

Module	Total Duration	Units	Description	Duration (min)
Pre-read		Discover Workplace Analytics	MS Learn modules on Workplace Analytics	45
Organizational Resilience with Workplace Analytics	3 hours includes 2 x 10 min breaks + 20 min closing Q&A	Introduction	Introductions of students and faculty	10
		Review of Sales Flow	Review of Microsoft's sales process & customer flow	30
		Organizational Resilience	The 3R (Respond, Recover, Reimagine) framework with WpA	20
		Appendix	Additional content to tailor your pitch	10
		Case Studies	Case studies mapped to the 3R framework	30
		Home Work Blog	Summary of our internal research on our Response + Recovery	10
		PowerBI Templates	Review of self-service PowerBI templates powered by WpA	30
Data-driven insights and action	4 hours with 3 x 10 min breaks	Introduction	Introductions of students and faculty; overview of the training	10
		Services overview	Typical service packages and their outputs	30
		WpA metrics	How WpA works and key measures of collaboration	30
		PowerBI solutions	WpA dashboards and the Ways of working assessment	30
		Insights to action	Taking action on insights and services opportunities to help drive organizational change	75
		Privacy & Trust	Handling privacy & trust conversations	30

Agenda for Day 1: Organizational Resilience with Workplace Analytics			
Introductions		10 min	
Review of Sales Flow	Review of Microsoft's sales process & customer flow	30 min	Organizational Resilience_L200_Master Deck.pptx (section <i>Insights Partner Sales Flow</i>)
Organizational Resilience	The 3R (Respond, Recover, Reimagine) framework with WpA	20 min	Organizational Resilience_L200_Master Deck.pptx (section <i>'L200 - Organizational Resilience'</i>)
	-break-	10 min	
Appendix	Additional content to tailor your pitch	10 min	Organizational Resilience_L200_Master Deck.pptx (section <i>'Guiding questions' and 'Appendix'</i>)
Case Studies	Case studies mapped to the 3R framework	30 min	Organizational Resilience_L200_Master Deck.pptx (section <i>'Case Studies'</i>)
	-break-	10 min	
Home Work Blog	Summary of our internal research on our Response + Recovery	10 min	Organizational Resilience_L200_Master Deck.pptx (section <i>'Home Work Blog'</i>)
PowerBI Templates	Review of self-service PowerBI templates powered by WpA	30 min	Power BI web environment (MSFT internal) Power BI docs site (MSFT external)
Closing Q&A		20 min	
Feedback Survey		5 mins	

45 minutes - Microsoft Learn

Any questions about today's pre-work materials?



Discover Microsoft Workplace Analytics

42 min • Module • 5 Units

★★★★★ 4.7 (59)

Beginner Business Analyst Microsoft 365 Workplace Analytics

Learn what Microsoft Workplace Analytics is, how it works, and key features that allow you to generate insights and improve collaboration in your organization.

Learning objectives

At the end of this module, you should be able to:

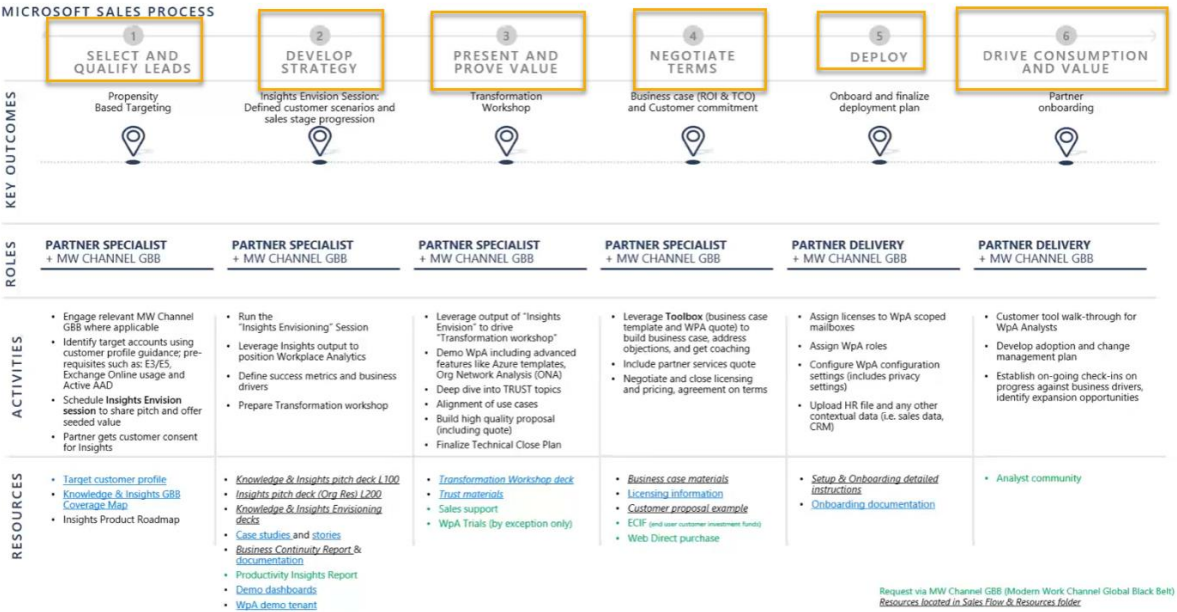
- Identify how Workplace Analytics can help improve collaboration behaviors in your organization.
- Discover the sources of data used in Workplace Analytics.
- Learn how to navigate and use the features in Workplace Analytics.
- Understand tasks and considerations for setting up Workplace Analytics and managing privacy.



<https://docs.microsoft.com/en-us/learn/modules/workplace-analytics-discover/>

Insight Partner Sales flow

INSIGHTS PARTNER SALES FLOW



Org Characteristics

Who is a Workplace Analytics Target?

Org Characteristics:

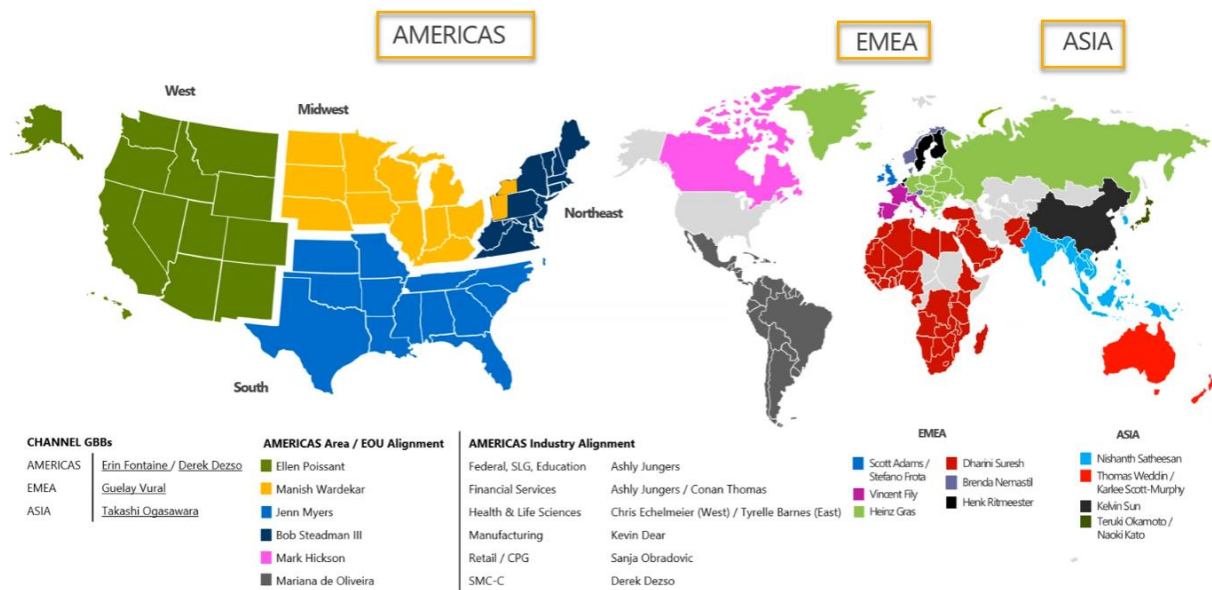
- Knowledge workers
- O365/M365 licenses
- Exchange Online P1 or P2, Exchange Kiosk
- 100+ active users (statistical relevance)
- All industries

Customer Personas:

- C-Suite
- HR
- Transformation Officer
- IT

Coverage

FY21 Knowledge & Insights GBB Coverage



Customer Stories and Microsoft Stories

Workplace Analytics is a data-driven solution that reveals **aggregated and de-identified** insights about the **way work gets done**, empowering business leaders to explain and predict the impact of day-to-day actions on **business outcomes**, and then **drive and measure change**.

Customer Stories

- Fortune 500 software company** uses Workplace Analytics to understand top-performer/HiPo behaviors.
Results: after implementation, sales reps that adopted top-performer habits outperformed others by \$237M in incremental closed deals (equaling 10% of company's overall top line revenue).
- Top financial industry company** uses Workplace Analytics to prove that orgs were either under-utilized or close to burnout.
Results: after implementation, over-stretched orgs were freed up by 25%, shifting to under-utilized groups; now CFO can make data-driven staffing decisions for better capacity balance.
- BP** improves decision-making agility with Workplace Analytics about where to place oil drills worldwide going from a 55-day process down to 10 days.
- Rand Mutual Assurance** used Workplace Analytics to break down silos and increase cross-departmental collaboration by 22%. [Customer Video](#)
- AB InBev** – the world's largest brewery – reduced meeting hours company-wide and optimized processes resulting in happier, more productive and innovative employees. [Customer Video](#)
"Workplace Analytics is the tool that really allowed us to convert data into dollars in a way that was novel for us."
- Craig Katerberg, VP and General Counsel, North America Zone, **AB InBev**
- LITE-ON** transforms culture with Workplace Analytics by increasing team agility and efficient collaboration.
"We opted to use Workplace Analytics because we wanted to increase team agility and efficient collaboration. What we got was the perfect tool to strengthen our Group CEO's vision of digital transformation during a particularly opportune time for us to increase our foothold in the global technology sector."
- Crystal Liu, Corporate Vice President of Human Resources, **LITE-ON**

Microsoft Stories

- Microsoft Australia** uses Workplace Analytics to reduce time in internal processes, increase time with customers and give managers more time with their sellers
- Microsoft Netherlands** reinvents its workspace to increase collaboration and customer face time as well as fuel innovation
- Microsoft Sales** uses Workplace Analytics to 'pressurize the system' and increase seller performance and sales manager effectiveness
- Microsoft Hardware Engineering** transforms its ways of working to improve work-life balance
- Microsoft Canada** reduces overall collaboration time for Monthly and Quarterly Business Reviews for finance employees by 15%
- Microsoft France & Microsoft Germany** Works Councils approve Workplace Analytics to find root causes to and decrease after-hours work with the intention of improving overall employee experiences

"With the Workplace Analytics (business continuity) dashboard, we've been able to apply real evidence to the anecdotal feedback, ... to help us really understand and validate how patterns are shifting. A world without using WpA data, it would be very subjective."
- Rob Gillard, VP of Planning and Enablement, **Lumen (CenturyLink)**



Workplace Analytics Licensing

Workplace Analytics Licensing

Standard offerings			
	WpA Standalone	WpA Add-on to E5	WpA Add-on to non-E5
SKU	GWZ-00002	GWZ-00006	GWZ-00027
List Price ¹	\$6/u/m	\$2/u/m	\$2/u/m
Prerequisite	Exchange Plan 1 or 2	O365 E5	Any O365/M365 plan
Notes	\$2 price (GWZ-00027) is FY21 promo.		Available as VL SKU beginning 8/1/20 and via Web Direct promocode beginning 7/1/20. Contact Channel GBB for Web Direct purchase option. Available until 6/30/21.

Contact MW Channel GBB with any questions.

Typically 1000 licenses example

Use case

Mailbox

Core Pitch

Autosave On | Organizational Resilience_L100_Master Deck (New & copy) | Scott Hadley

File Home Insert Draw Design Transitions Animations Slide Show Review View Help

INTERNAL USE ONLY

Choreography of our core pitch

Challenger Sales Pitch Choreography: 6 core pitch slides

Customer Emotional State

Warmer

Disruption: The new normal

Share reframe & introduce impact

Introduce value

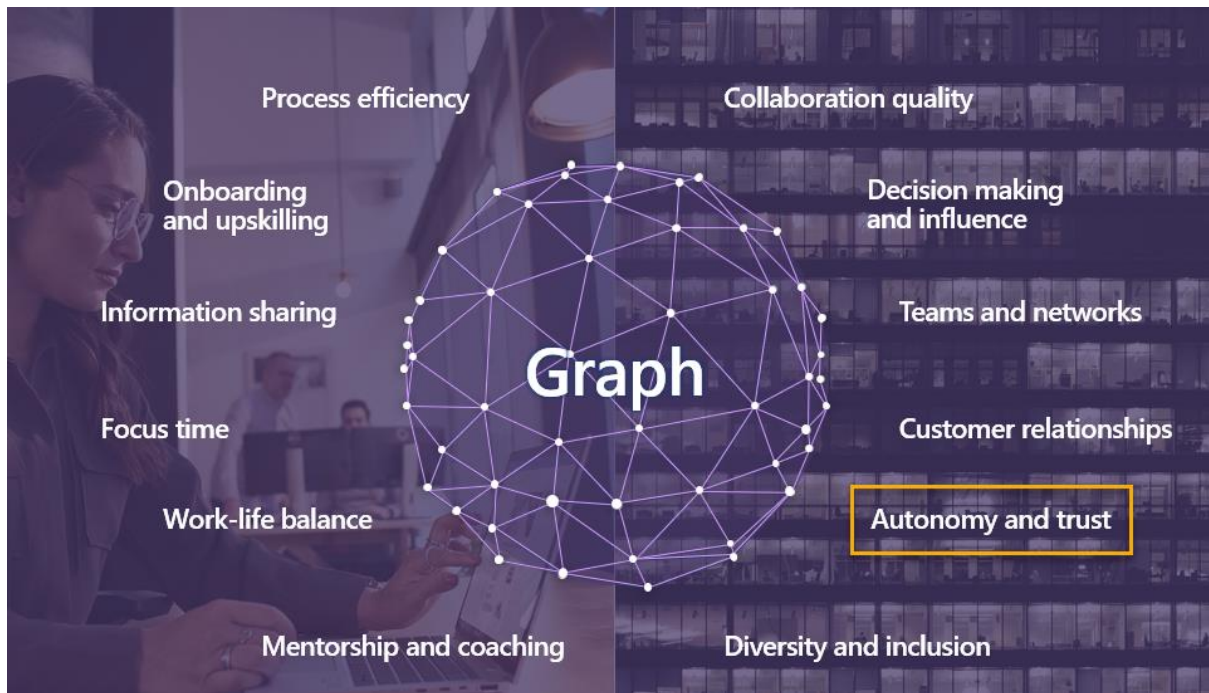
Our solution

Graph

Stage of Choreography

20

Graph

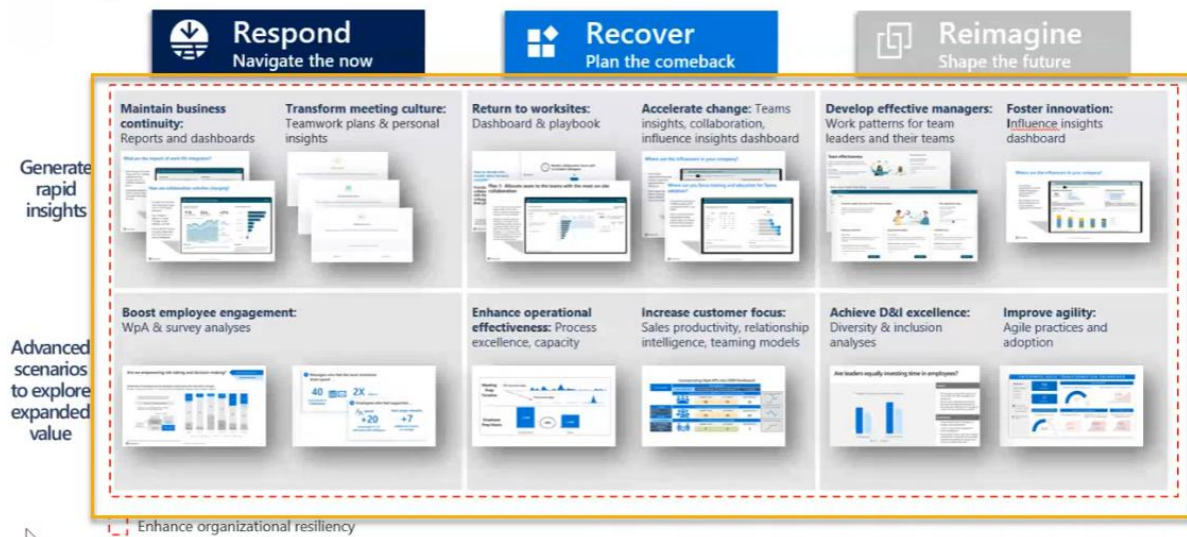


Respond , Recover and Reimagine

Equip leaders to respond to this disruption, plan their recovery, and reimagine their organization to grow resilient

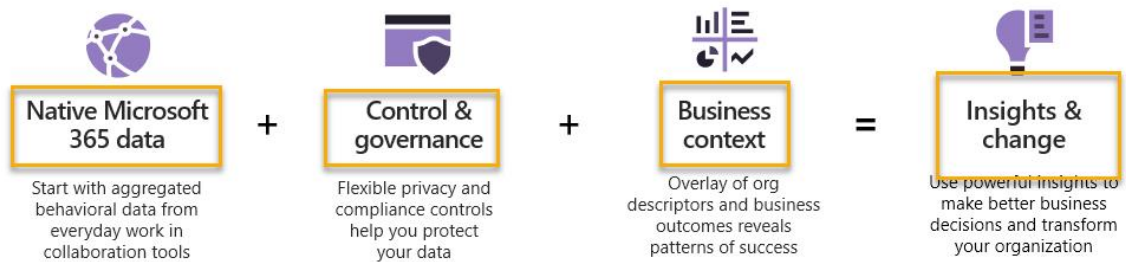


Insights that drive business outcomes



Privacy

How does it work?



Watch video [Part 2: Case Studies](#)

Use case examples

- Large MNCs
- Protecting well being
 - 1) Reduce the force
 - How many they field for remaining staff questions
 - 1.5 times job with new responsibilities
 - 2) How productive the staff was
 - 3) Protect people and staff with the company.

Transform productivity with data-driven insights

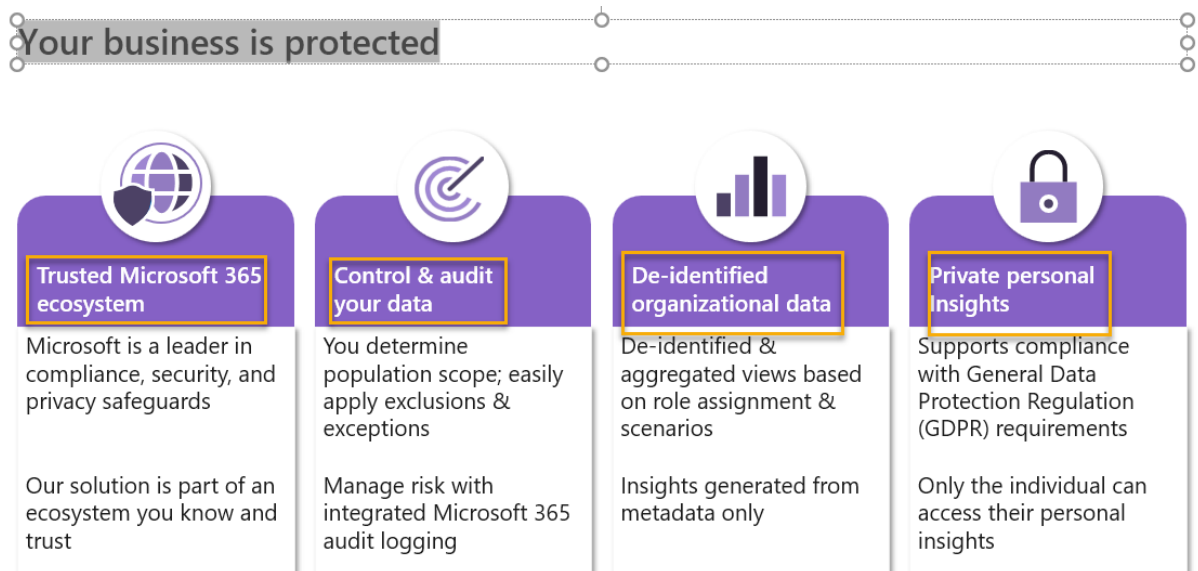
Transform productivity with data-driven insights



Demo Environment

- We don't give a demo...
- **Show the technology**
-

Your business is protected

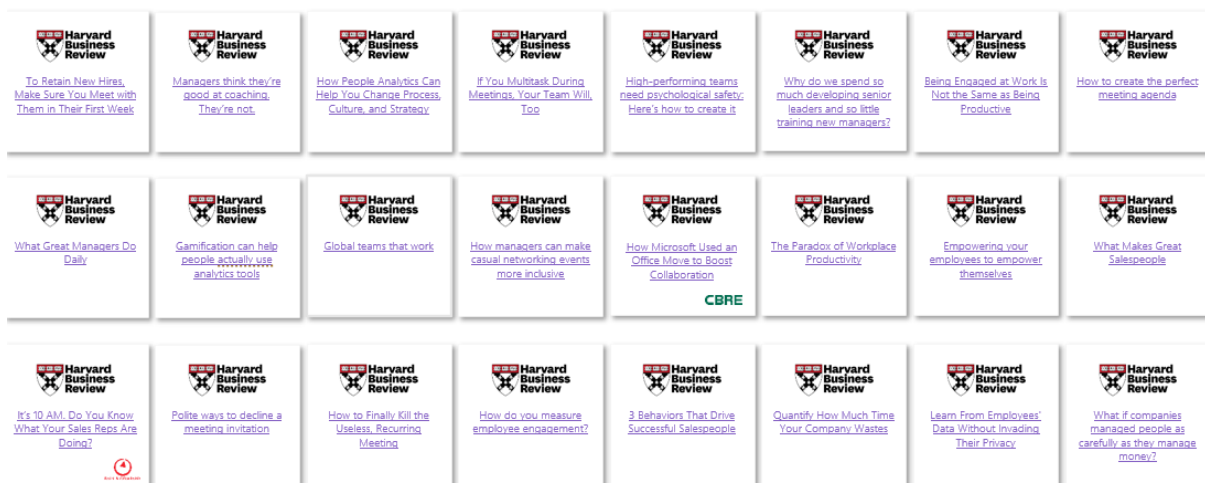


Partnering on research and with companies leading the way

Partnering on research and with companies leading the way



Real-world research fuels product development



Visit insights.office.com for research and inspiration

insights.office.com

Organizational resilience

Organizational resilience

RESPOND



- Which groups are at risk of burnout due to over-collaboration?
- Which groups are isolated or disconnected?
- Are our external relationships at risk?

RECOVER



- Which groups are most interdependent and may need colocation?
- Are we collaborating efficiently within our critical processes?
- What collaboration practices do top performers exhibit?

REIMAGINE



- How well do we integrate new hires during onboarding?
- What informal, organic teams have formed?
- How can we reimagine customer and supplier outreach?

"We wanted to know:

- Are we still maintaining the level of productivity that we aspire to provide for our customers?
- Is there a technology gap with some groups of employees?
- Are some roles easier to transition to remote work than others?

Instead of relying on intuition, Workplace Analytics gave us real data about this new world of remote working."

– Fortune 500 Agile Transformation Leader

What are the impacts of work-life integration?



How are collaboration activities changing?



Customer feedback

Customer feedback



"We find Workplace Analytics really helpful as we navigate remote working for nearly 10,000 staff... Having real information about how our teams are adapting helps us make better decisions."

– Tom Kilroy, COO, Finastra



"It (Workplace Analytics) gives us amazing rapidly moving insights into connectivity across the organization, as well as the way people are spending their time."

– Sally Smith, People Insights & Research Manager, National Australia Bank



"With the Workplace Analytics (business continuity) dashboard, we've been able to apply real evidence to the anecdotal feedback, ... to help us really understand and validate how patterns are shifting. A world without using WpA data, it would be very subjective."

– Rob Gillard, VP of Planning and Enablement, CenturyLink



"Shortly into this transformation, we realized the pace of change and the new communication pathways required a check-in on our business, to identify risks and codify the outcomes of our changes. The business continuity dashboard gave us an elegant solution to an otherwise complex problem, allowing us to measure the impact of change, and identify and respond to our new normal."

– Victor Bilgen, Partner, McChrystal Group

Resilient businesses act concurrently throughout three phases

Resilient businesses act concurrently throughout three phases



Equip leaders to respond to this disruption, plan their recovery, and reimagine their organization to grow resilient

- **Respond**

- Protect employee wellbeing
- Sustain org connectivity/
digital collaboration
- Maintain customer/
supplier continuity

- **Recover**

- Enable employee wellbeing
- Manage the return to office/ Enhance operational effectiveness
- Strengthen customer and supplier relationships

- **Reimagine**

- Boost employee engagement/ develop effective managers
- Improve agility/
foster innovation
- Reinvent customer and
supplier journeys

Equip leaders to respond to this disruption, plan their recovery, and reimagine their organization to grow resilient

Solutions that support:	 Respond Navigate the now	 Recover Plan the comeback	 Reimagine Shape the future
Individual employees	Protect employee wellbeing	Enable employee wellbeing	Boost employee engagement/develop effective managers
Teams and organizations	Sustain org connectivity/digital collaboration	Manage the return to office/Enhance operational effectiveness	Improve agility/foster innovation
External stakeholders	Maintain customer/supplier continuity	Strengthen customer and supplier relationships	Reinvent customer and supplier journeys

RESPOND: Gain immediate visibility to maintain business continuity

- Individual Employees

- Which groups are at risk of burnout?
- Which groups might be isolated or disconnected?
- What are the collaboration behaviours of teams that are performing well?

- Teams and Organizations

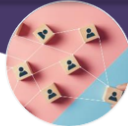
- Where do we have gaps in communication?
- Which teams have strengthened or lost connections?
- Which organizations need coaching and support?

- External Stakeholders

- What external relationships are most at risk?
- Are we investing enough time in our mission-critical suppliers?
- Are we matching our investment in customers based on value-at-risk?

RESPOND: Gain immediate visibility to maintain business continuity



	Individual Employees	Teams and Organizations	External Stakeholders
Organizational needs	Protect employee wellbeing 	Stay connected/adopt digital collaboration 	Maintain customer and supplier continuity 
Typical insights	1 Which groups are at risk of burnout? 2 Which groups might be isolated or disconnected? 3 What are the collaboration behaviors of teams that are performing well?	1 Where do we have gaps in communication? 2 Which teams have strengthened or lost connections? 3 Which organizations need coaching and support?	1 What external relationships are most at risk? 2 Are we investing enough time in our mission-critical suppliers? 3 Are we matching our investment in customers based on value-at-risk?

RECOVER: Return business to stability and set solid foundations for change

- **Individual Employees**

- How long/how much time do we spend on specific processes?
- How can you activate influencers to drive change?
- Which behaviours help optimize our use of various collaboration tools?
- How can we support remote or hybrid office collaboration?
- Which teams need more support from managers?

- **Teams and Organizations**

- How is overall collaboration impacted by a WFH or hybrid office?
- How can I adjust my office to meet employees' preferred collaboration styles?
- Which groups and teams would benefit the most from returning to office?
- How to adjust to limited on-site capacity constraints

- **External Stakeholders**

- Are we matching our investment in customers with value potential?
- What practices do our top performers exhibit?
- How can we improve our teaming model to better serve our customers?

RECOVER: Return business to stability and set solid foundations for change

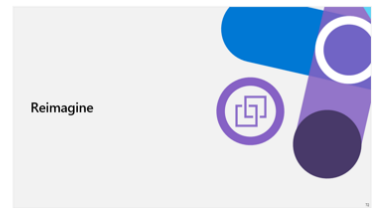
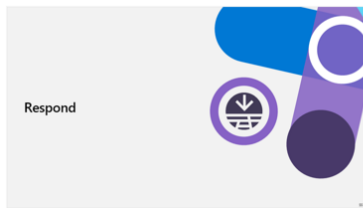


REIMAGINE: Prepare for future uncertainty with resilient culture and processes

REIMAGINE: Prepare for future uncertainty with resilient culture and processes



Case Studies examples



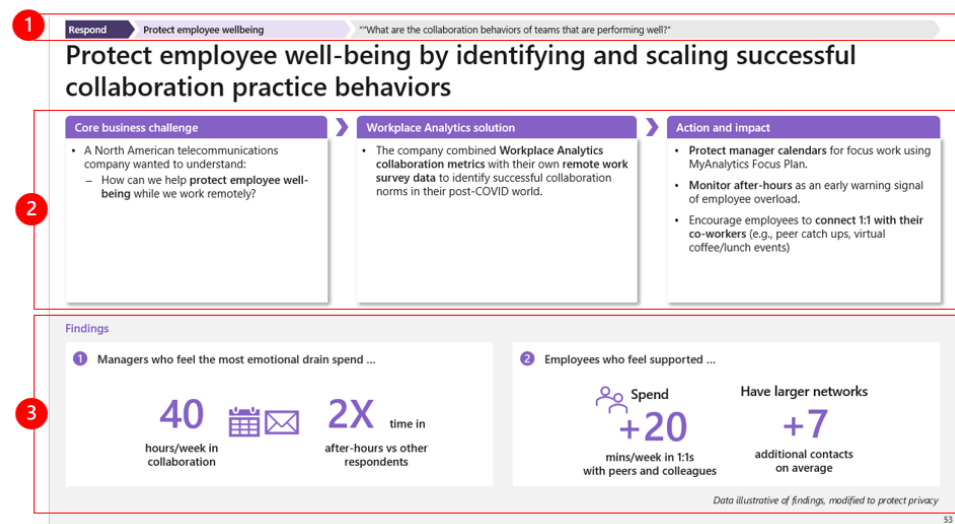
Structure of the case study

Mapping to 3R framework

Structure

- Business challenge
- Solution
- Action & impact

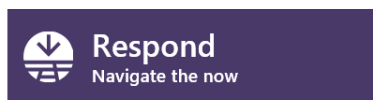
Illustrated findings



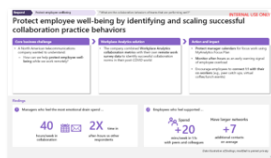
Case studies we will cover today ("double-click" to navigate)

Case studies we will cover today ("double-click" to navigate)

INTERNAL USE ONLY



Respond
Navigate the now



Protect employee wellbeing



Recover
Plan the comeback



Enhance operational effectiveness



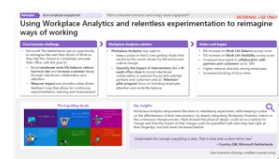
Reimagine
Shape the future



Improve agility

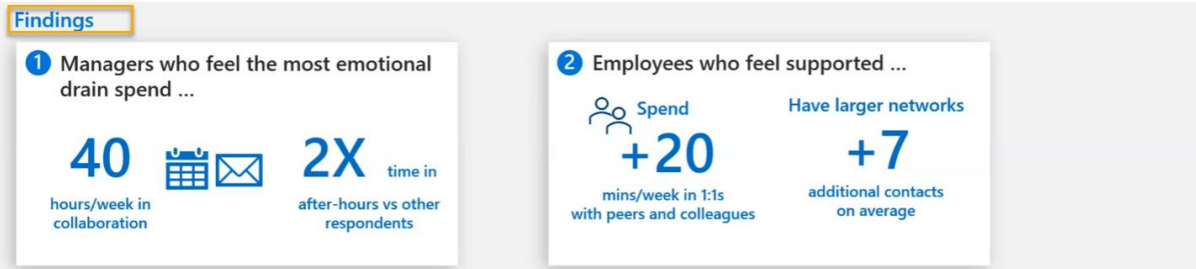
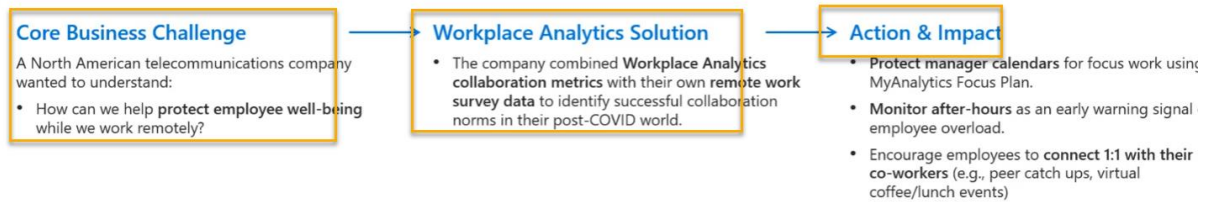


Maintain customer/supplier continuity



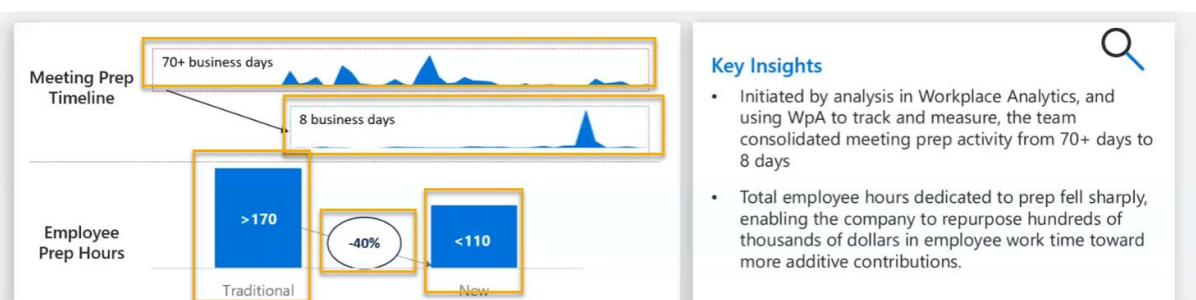
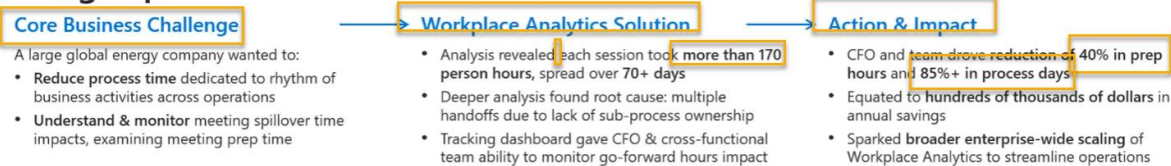
Boost employee engagement

Protect employee well-being by identifying and scaling successful collaboration practice behaviors.



Enhance operational effectiveness

Reclaiming thousands of process hours at a global oil & gas company using WpA



Improve agility

Driving an agile transformation journey using Workplace Analytics

Core Business Challenge

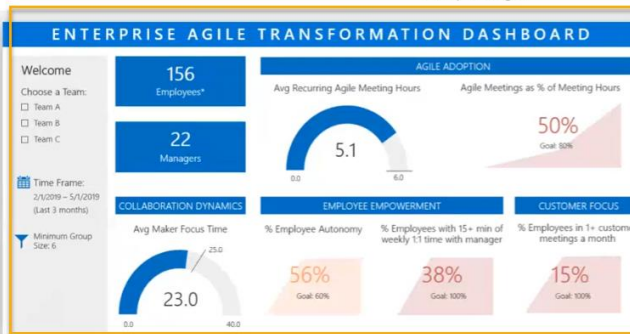
- Measure impact of pilot transformation program
- Boost agility and customer focus across all business segments
- Prepare to expand pilot program enterprise-wide

Workplace Analytics Solution

- Spotted blockers and proactively created solutions ahead of scaled rollout
- Agile pilot dashboard to track org's progress and identify opportunities
- Streamlined push toward multi-year migration to Enterprise Agile

Action & Impact

- Modified enterprise agile rollout & created an agile playbook based on WpA insights
- At scale, enterprise agile program will boost customer interaction and engagement
- Early detection of blockers will save hundreds of hours and deliver quicker time-to-value



Key Insights

Workplace Analytics showed that agile transformation created greater team focus & employee autonomy, but had not yet boosted customer interaction.

"We never thought we would be able to put numbers on cultural transformation. This was a real eye opener for us."

Agile Transformation Leader

Watch video [Part 3: Power BI Demo Dashboards](#)

Microsoft's Findings: What happens when work goes remote?

- Workdays are getting longer
 - After-hours collaboration increased by 30%
 - Nearly 7 out of 10 people experiencing workweeks that expanded by +3hrs
- Managers bearing a high collaboration load
 - 65% increase of time spend in chats
 - 2x increase in time spend in Teams calls

Microsoft's Findings: What happens when work goes remote?

Home | Work

A research project and blog series chronicling the use of Workplace Analytics by Microsoft teams to measure how our working lives are impacted by the shift to 100% remote work in response to Covid-19

Example Findings from Articles

1 Workdays are getting longer

After-hours collaboration increased by **+30%**

Nearly 7 out of 10 people experiencing workweeks that expanded by **+3hrs**

2 Managers bearing a high collaboration load

65% increase of time spend in chats

2x increase in time spend in Teams calls

All blog articles

1. [When office work goes remote, what will we learn?](#)
2. [In China, managing relationships, teams, and more meetings from home](#)
3. [The rise of 30-minute meetings, and other ways collaboration is changing](#)
4. [Balancing work and life under one roof](#)
5. [The human side of business continuity](#)
6. [The new manager 1:1: nurturing employee resiliency during disruption and change](#)
7. [Uncovering resilience: measuring organizational networks during crisis](#)
8. [Supporting customer and supplier relationships in uncertain times](#)
9. [Lessons from China: A return to the office, but not to the old way of working](#)

*Related publication: HBR article highlighting top findings

Microsoft China: Managing relationships, teams, and more meetings from home

Microsoft China: Managing relationships, teams, and more meetings from home

Home | Work

Core Business Challenge

We studied changes in collaboration patterns amongst employees in Microsoft China, who were among the first Microsoft employees globally to move to a 100 percent remote work plan

Findings

Expected people's networks to shrink, but this didn't happen

1 Remote work doesn't necessarily yield smaller network size

2 out of 3 employees

2 Managers bearing a high collaboration load

65% increase of time spend in chats

3 Multitasking in meetings doesn't appear to be an issue

90% of people multitasked (sent/read emails or chats)

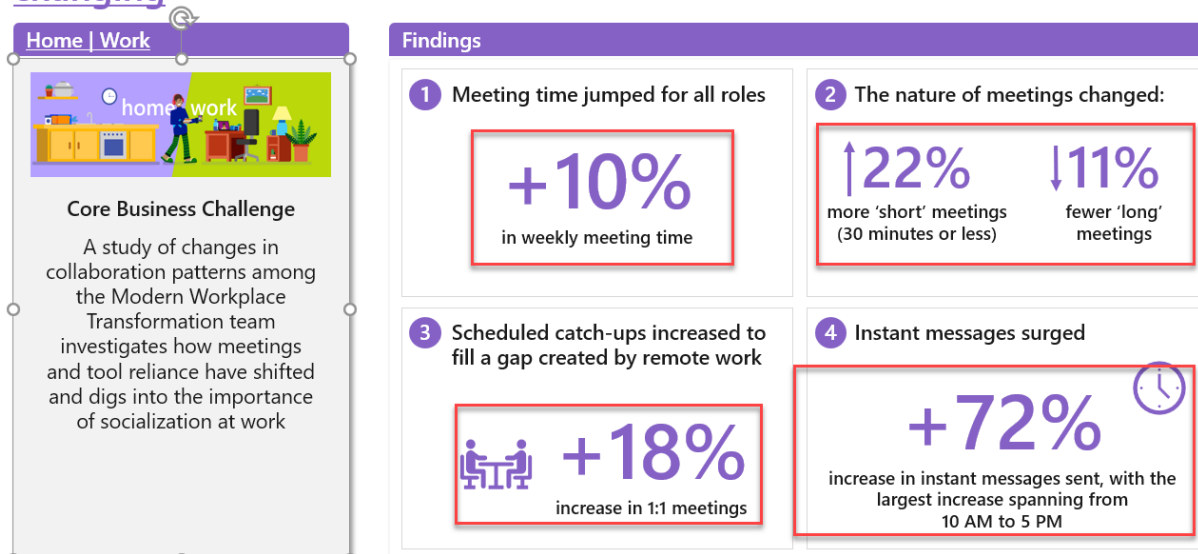
<30% change in network size

2x increase in time spend in Teams calls

<10% of meetings

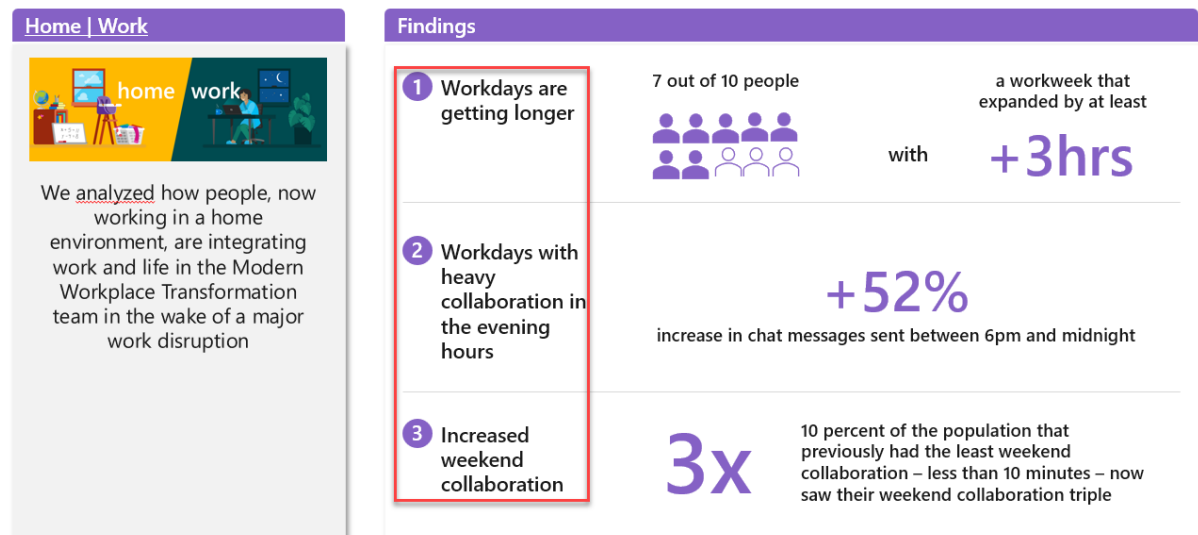
The rise of 30-minute meetings, and other ways collaboration is changing

The rise of 30-minute meetings, and other ways collaboration is changing



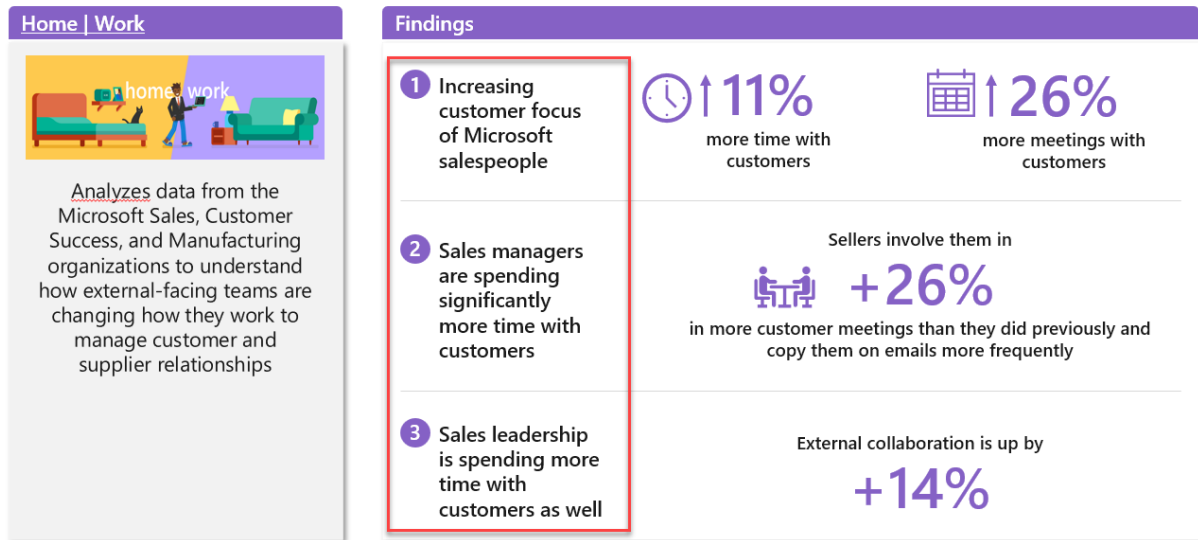
Balancing work and life under one roof

Balancing work and life under one roof



Supporting customer and supplier relationships in uncertain times

Supporting customer and supplier relationships in uncertain times



Settings

Select settings for your report

Select an earlier time period to use as a baseline for comparison. This should not overlap with the current time period.

1/1/2020 2/29/2020

Select the current time period to measure against the baseline.

3/1/2020 4/25/2020

Select an organizational attribute to view the report by.

Organizational Attribute
Organization

To filter employees, select the organizational attribute and values you would like to filter by.

Organizational Attribute
Organization

Select filter values
All

Clear filter

Measured employees (No filters applied)

352

Note: Groups with less than 5 people will not be displayed in the report.

[Documentation](#)

[Feedback survey](#)

Power BI at 17 mins

Introduction

Track behavior change and target opportunities to improve employee wellbeing, meeting culture, and manager effectiveness

1) How have the KPIs evolved over time?

2) How have KPIs changed in the last week?

3) How do organizations compare?

4) Have any key scorecard metrics changed?

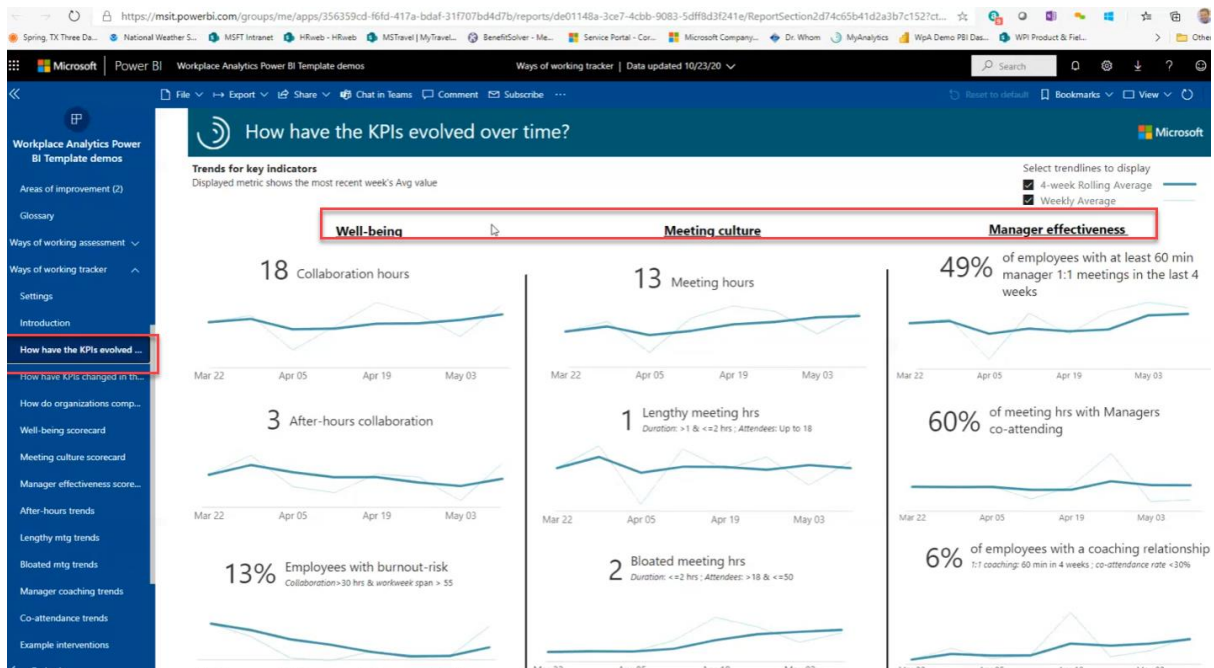
5) Are trends moving in the right direction?

Why it matters

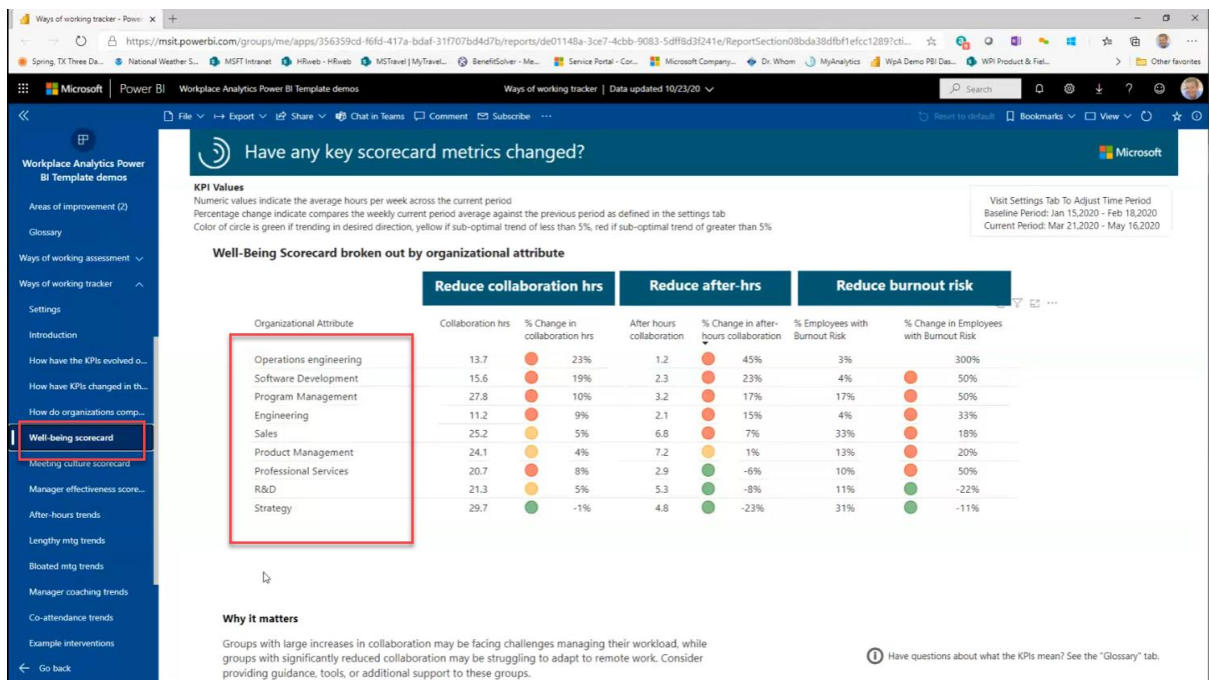
Protecting the wellbeing of employees, establishing a meeting culture where employees are enabled to do their best work and ensuring that managers are effective at coaching employees are key considerations in optimizing work behaviors.

Workplace Analytics data helps you track behavior change over time. It also provides an avenue for identifying where opportunities to optimize work behaviors may lie.

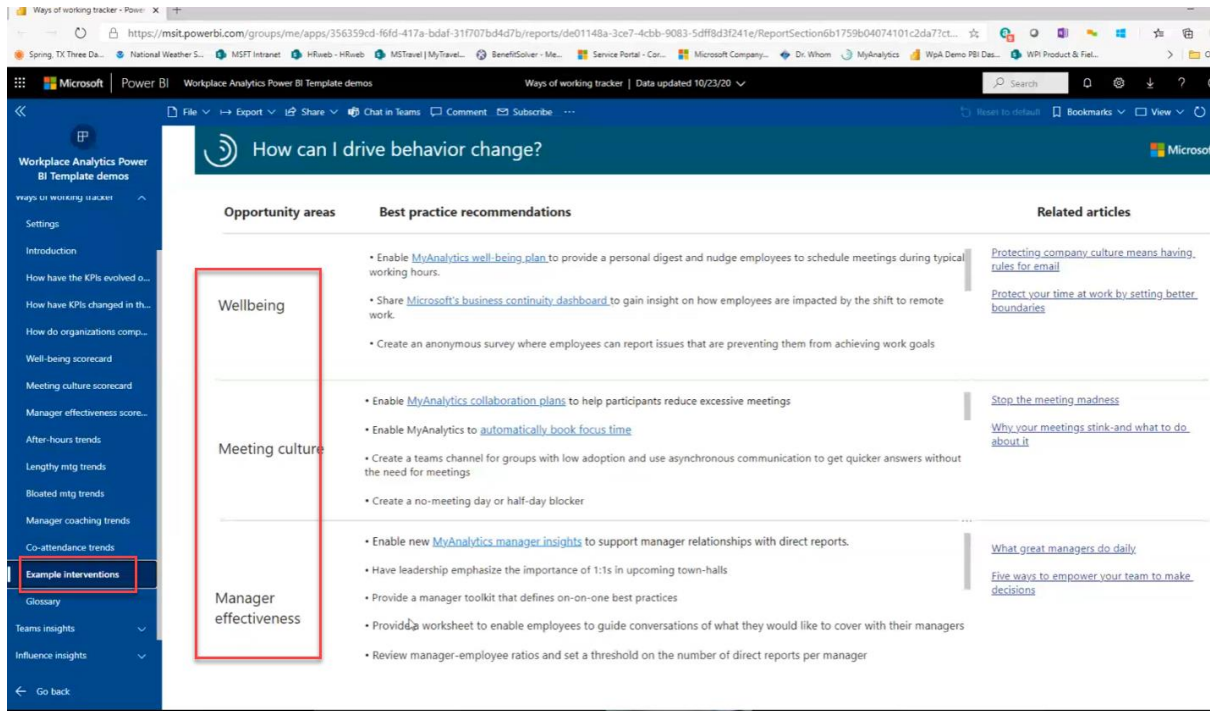
KPIs



Wellbeing Scorecard



Example interventions



Answer by Global Black belts

- What use case they are working?
 - Which specific business case they need to address?
 - Try with smaller use population for POC.
- HR has better visibility
IT is supporting only

Module 2: Data-driven Insights and Action

Watch video [Part 1: Intro & Services Overview](#) (35 min)

Data-driven insights and action

Today we cover Data-driven insights and action

Module	Total Duration	Units	Description	Duration (min)
Pre-read		Discover Workplace Analytics	MS Learn modules on Workplace Analytics	45
Organizational Resilience with Workplace Analytics	3 hours includes 2 x 10 min breaks + 20 min closing Q&A	Introduction	Introductions of students and faculty	10
		Review of Sales Flow	Review of Microsoft's sales process & customer flow	30
		Organizational Resilience	The 3R (Respond, Recover, Reimagine) framework with WpA	20
		Appendix	Additional content to tailor your pitch	10
		Case Studies	Case studies mapped to the 3R framework	30
		Home Work Blog	Summary of our internal research on our Response + Recovery	10
		PowerBI Templates	Review of self-service PowerBI templates powered by WpA	30
Data-driven insights and action	4 hours with 3 x 10 min breaks	Introduction	Introductions of students and faculty; overview of the training	10
		Services overview	Typical service packages and their outputs	30
		WpA metrics	How WpA works and key measures of collaboration	30
		PowerBI solutions	WpA dashboards and the Ways of working assessment	30
		Insights to action	Taking action on insights and services opportunities to help drive organizational change	75
		Privacy & Trust	Handling privacy & trust conversations	30

The final day we discuss how to sell with a Transformation Workshop

Module	Total Duration	Units	Description	Duration (min)
Pre-read		How-To Guide	How-To Guide for Transformation Workshop	30
Transformation Workshop	3 hours includes 2 x 10 min breaks + 20 min closing Q&A	Workshop Preparation	Review objectives, best practices, roles, and preparation tips	30
		Customer Journey and Goals	How customers adopt & scale WpA + business goal alignment	30
		WpA Outcomes	Review of WpA outcomes and sample supporting analyses	45
		WpA Business Case	Review the steps to develop a business case for WpA	25
		Workshop Follow-Ups	How to proceed after the workshop	10

Services Overview

- delivering services to customers along a spectrum depending on their needs and readiness

		Workplace Analytics Services		
Option	Customer self serve	① Training – WpA Academy	② Services – Ways of working assessment	③ PREVIEW Services - 360 Diagnostic
Scope	- Onboard WpA, including setting up WpA data file, structuring organizational data, and assigning licenses to their population - Access to pre-built queries and templates, allowing out-of-the-box functionality to measure collaboration patterns, business continuity, and more - Online documentation and customer service available to answer questions as customer analysts work through setup and deploying the tool	2-day analyst training + up to 8 "office hours" over 4 weeks to help your analysts get up to speed on WpA - Mix and match modules with content covering all WpA topics and potential analyses. Modules focused on analysts currently (data scientist, developer, and business leader modules) under construction	- WpA experts help customer onboard WpA, structure their organizational data file, and assign WpA licenses - Take customer analyst(s) by the hand in setting up templates - Help them glean insights from the data and communicate effectively with an executive ready PowerPoint deck - Prioritize opportunities and next steps	8-12 week services engagements with dedicated WpA experts - Uncover insights through deep-dive analytics that build on top of pre-built queries and templates to solve high-value business challenges, including around employee performance, engagement, and productivity - Analyze multiple data sources (e.g., CRM, performance management, engagement surveys)
Timeline	Dependent on customer resourcing and goals	2-day analyst training + 8 office hours over 4 weeks	~1 month	8-12 weeks <i>COMING IN EARLY 2021!</i>

1) WpA Academy - Offerings

WpA Academy is a set of offers that provide

- hands-on training,
- targeted at key user personas.
- Each offer consists of modules that customers can select from to meet their needs.

WpA Academy at-a-glance:

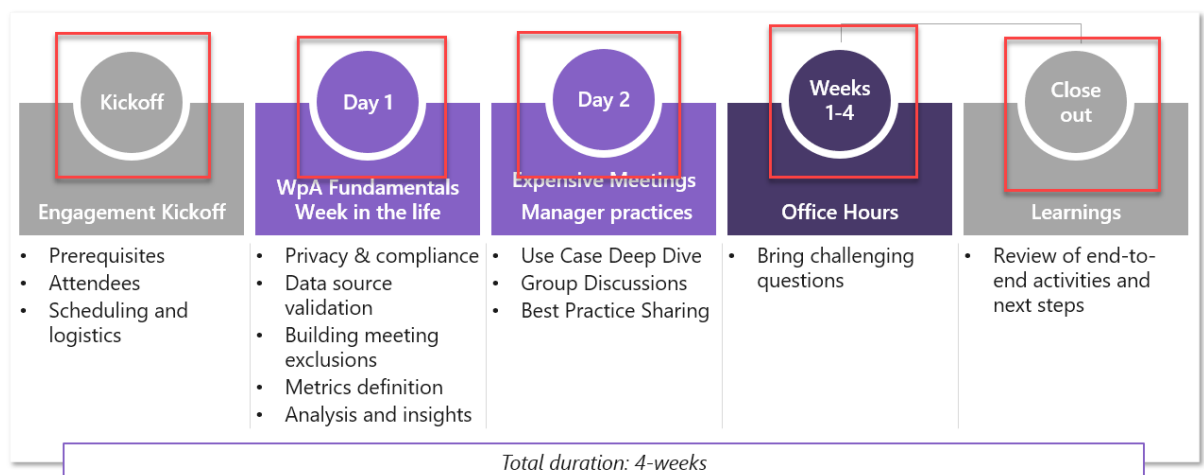
- 2-days + 8-hrs* Office Hours
- In-person or virtual training
- *Pre-Req: WPA live; Attendees handle data*
-

Schedule at-a-glance

Schedule at-a-glance

Analyst Essentials

Overview: Kickoff followed by two days of training and post-training office hours for a total duration of 4 weeks



Results for Analyst Essentials

Results for Analyst Essentials

Empowered analyst capable of delivering insights using Workplace Analytics

Leverage Explore dashboards for rapid hypothesis testing

Run custom queries for in-depth analysis

Validate source data and build customizable filters

Share findings and communicate insights

Preparing for Analyst Essentials

- Workplace Analytics enabled and licensed
- Attendee access to Workplace Analytics data
- 2 days of dedicated time from attendees
- Location for delivery

2 Ways of working assessment – Offerings

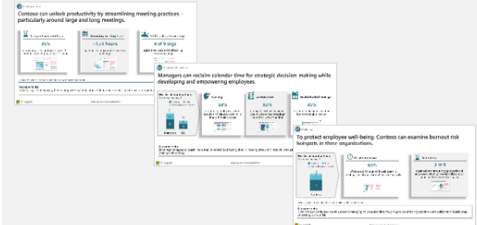
2 Ways of working assessment

Discover your organization's collaboration patterns

Get analyses and actionable insights across 3 common business outcomes

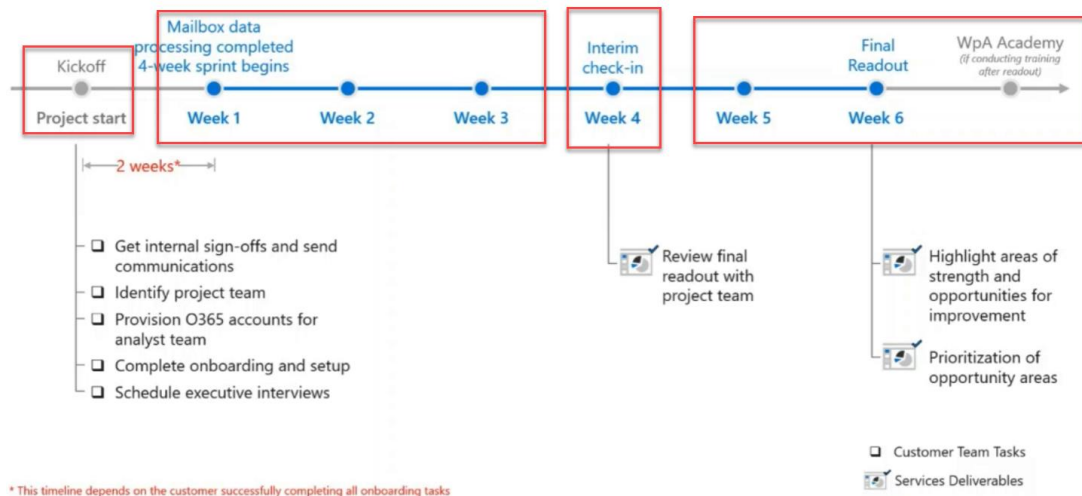
Identify the biggest opportunity areas, and how to tackle them

Ways of working assessment covers 3 common business outcomes

Transform meeting culture	• How much time do employees spend in long / large and recurring meetings? • Are employees wasting time in low quality meetings?	Opportunities that align to the 3 business outcomes:  2-day WpA Academy (analyst training)
Develop effective managers	• Are managers having regular 1:1s with employees? • Do managers delegate and empower their teams? • Do managers have capacity to guide their teams and focus on strategic work?	
Boost employee engagement	• Wellbeing focus – How are employees currently collaborating? – Do employees have high after-hours? – Are employees at risk of burn out?	
Logistics	• 4-6 week engagement • Includes Readout + WpA Academy • Week 1 begins after – Customer WpA Instance is up and running – MSFT project team is credentialed in customer O365 tenant	

- Ways of working assessment: High Level Workplan
-
- Preview: Workplace Analytics 360 Diagnostic

Ways of working assessment: High Level Workplan



3) Preview: Workplace Analytics 360 Diagnostic – Offerings

3 Preview: Workplace Analytics 360 Diagnostic

COMING IN EARLY 2021!

Uncover insights through deep-dive analytics to solve high-value business challenges around employee performance, engagement, and productivity

Identify highest value business opportunities and dive deep into root cause analysis

Analyze multiple data sources (e.g., CRM, engagement surveys, performance management) to uncover correlations

Develop a data-driven action plan, testable through customized Power BI dashboards

Deliverables

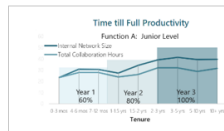
✓ Data Insights

- Establish collaboration baseline
- Capture assumptions and create testing plan
- Perform root cause analysis



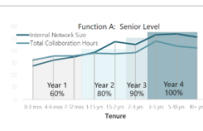
✓ Opportunity Map

- Build opportunity catalog
- Conduct high-level sizing of opportunities



✓ Prioritization Workshop

- Prioritize key initiatives based on impact size, time horizon, and fit with business objectives
- Align key stakeholders



✓ Real-time Dashboards

- Design ongoing operational dashboards to track progress
- Establish cadence to monitor progress



Timing and Logistics

- 8-12 week engagement
- 3-4 readouts/workshops

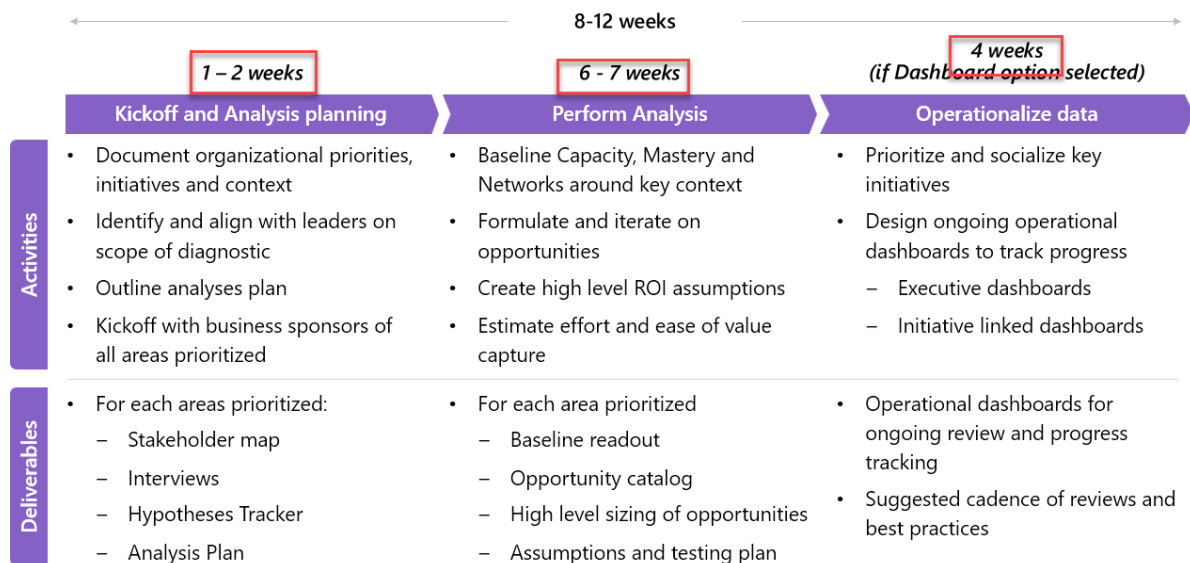
Engagement prerequisites:

- Customer Workplace Analytics environment is up and running
- Project team is credentialed in customer Office 365 tenant

16

360 diagnostic: Detailed workplan

360 diagnostic: Detailed workplan



360 services package – Core Topics – Offerings

360 services package – Core Topics

Duration: ~8-12 weeks

Each topic goes deep within ONE business outcome area

Each topic is fixed in scope

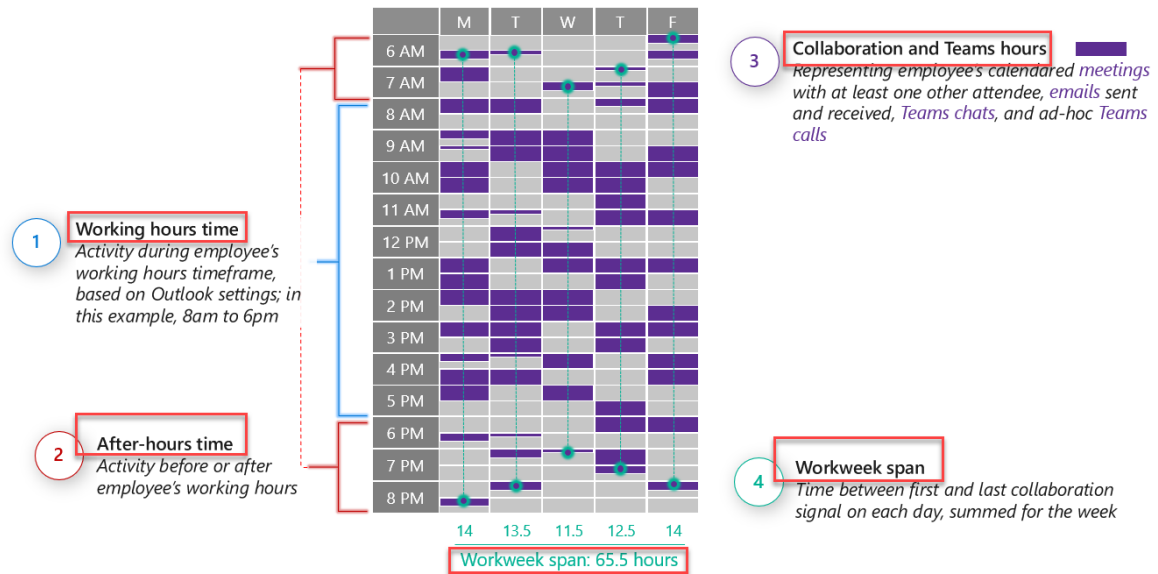
#	360 Topic	Data requirements	Other dependencies
1	Boost employee engagement	Person-level Survey/Engagement score data	
2	Diversity & Inclusion	WpA attribute that flags the under-represented groups of interest	- Scope limited to analyzing 2 diversity attribute - Sufficient number of employees in each under-represented attribute - Approval to analyze them
3	Improve agility (Spotify, SAFe frameworks)	Agile team and Agile role markers	Effectiveness depends on some production or output measure (e.g., # of features released, SLAs)
4	Enhance operational effectiveness	Process-related keywords	- Process analysis scope limited to 1 process - Effectiveness depends on including 1 or more output or productivity measures
5	Increase customer focus	- CRM data (Account and Contact) - Performance/quota attainment data	Scope limited to one single sales/BU segment
6	Inform return to worksites	- WpA attribute reflecting location (building, campus) - Floor plan for each building/campus	Scope limited to one office building

* If Microsoft performs the services for ALL desired office locations then this work can be accomplished without standing up Azure templates in the customers' environment. There is an internal-only version of the workplan planning tool that our internal consultants can use to deliver the work.

Watch video [Part 2a: Workplace Analytics Metrics](#) (9 min)

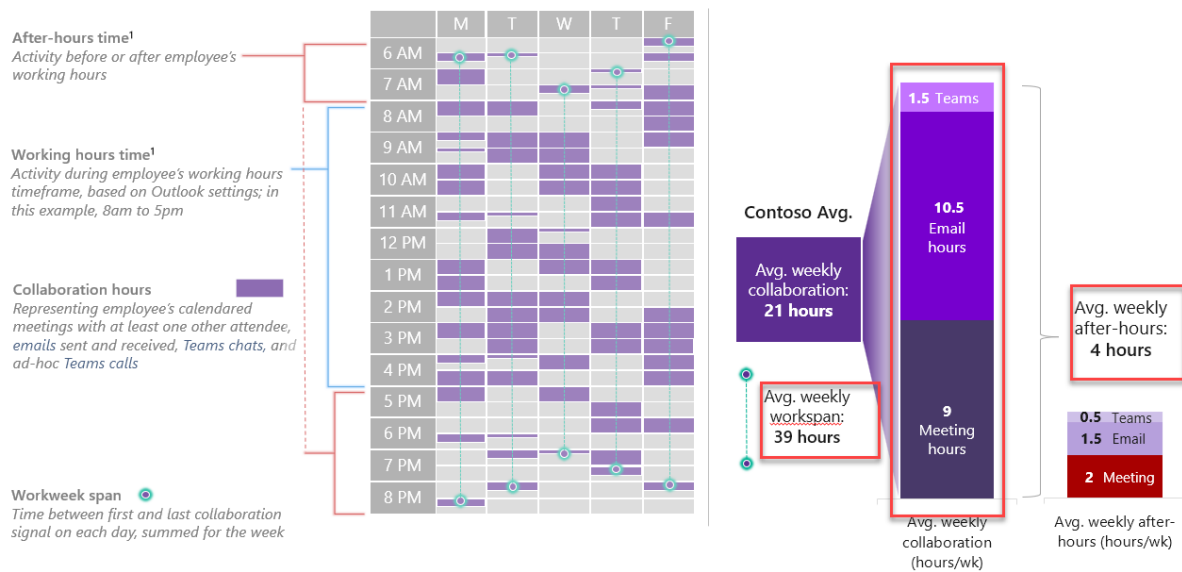
Workplace Analytics metrics represent the way people work

Workplace Analytics metrics represent the way people work



Here's how those numbers break down for Contoso

Here's how those numbers break down for Contoso

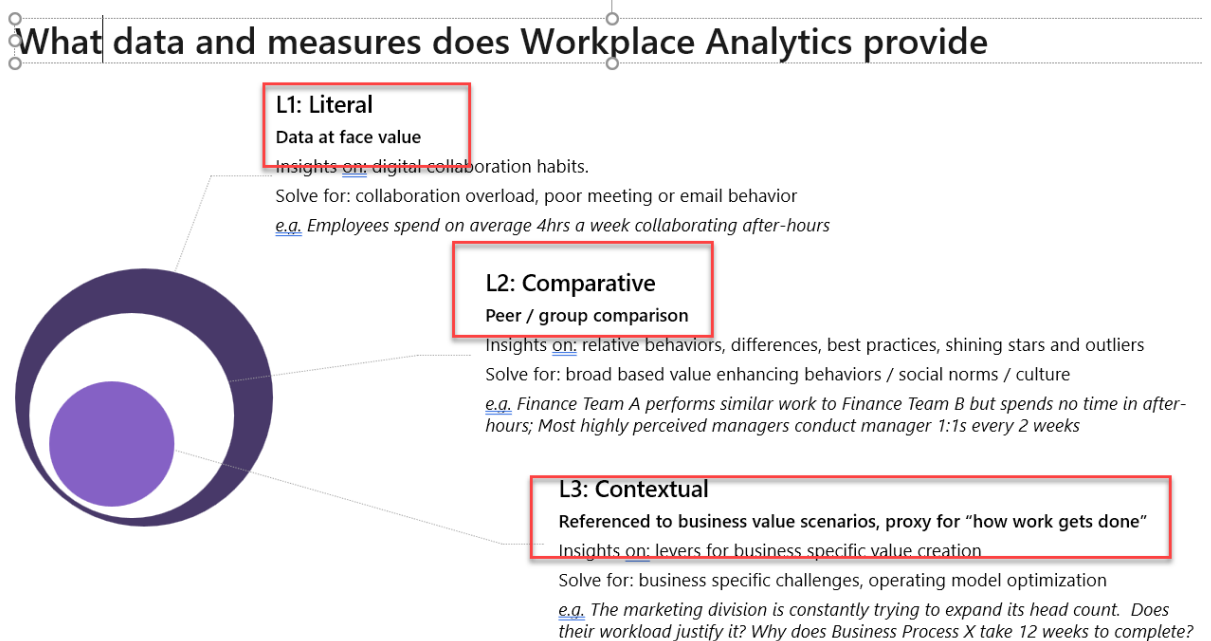


Watch video [Part 2b: Workplace Analytics Tool Demo](#) (21 min)

Watch video [Part 2c: Workplace Analytics PowerBI Solutions](#) (30 min)

What and measures does Workplace analytics provide

- **L1 – Literal (Data as face value)**
e.g. Employees spend on average 4 hours a week collaborating after-hours
- **L2 – Comparative**
Peer / group comparison
- **L3: Contextual**



Pre-Built Templates / Power BI Reports

WpA has a host of self-serve Power BI dashboards that customers can use once they have completed onboarding. These dashboards can be easily set up at any skill level

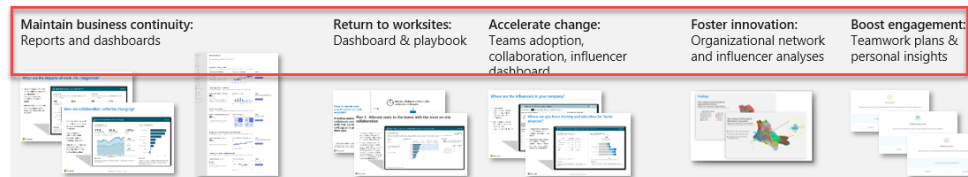
For **Sales purposes we have set up a few pre-built Power BI Dashboards** with Demo Data that can be used to showcase WpA operational capabilities

What do these Dashboards do ?

Generate self-serve insights that can be operationalized/monitored

- **Framing question:** what insight is this tab providing for the organization being analyzed?
- **Data visualizations:** bar charts, bubble charts, tables, and other visualizations answering the framing question
- **What to examine:** things to notice and areas to explore
- **Why it matters:** context for how the collaboration patterns described on the page affect teams and organizations

Aim to answer relevant Business Questions



Types of Workplace Analytics Solutions

Effort to deploy:

L Low M Medium H High

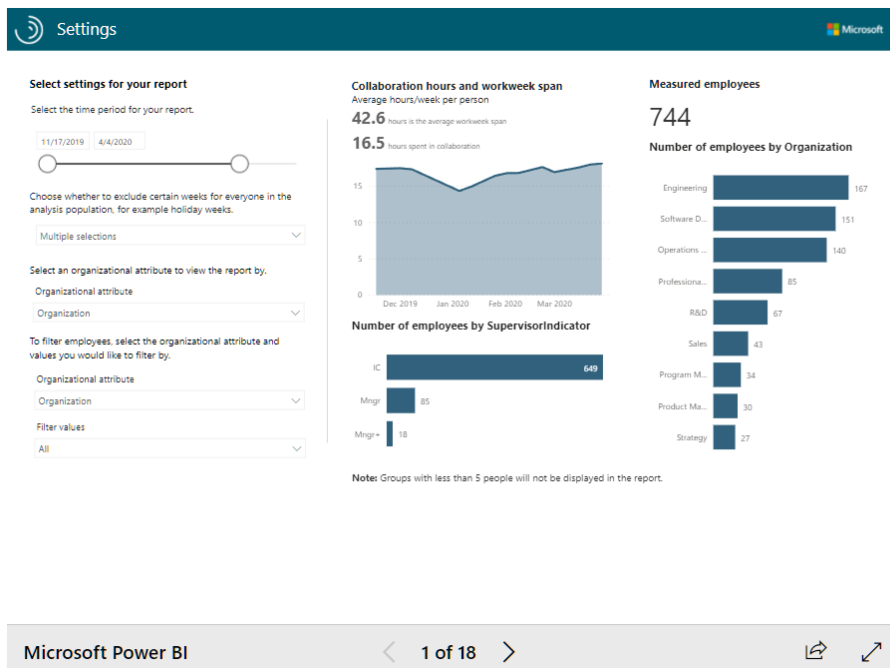
I want...		Solution	Surface	Value	Effort	Audience	End user can customize
Quick insights with no extra analysis effort	1	Workplace Analytics built-in "Home" metrics and "Explore" dashboards	Workplace Analytics	Introduction to key metrics and tracking over time	L	Leaders or program managers	Not customizable beyond filtering + drill-down
	2	Workplace Analytics Manager Insights	Workplace Analytics	Tracking of direct report well-being and team productivity over time	L	People Managers	Not customizable beyond filtering + drill-down
Scenario-specific dashboards that my analysts can customize if needed	3	Workplace Analytics Power BI templates: Business continuity, Teams adoption, Ways of working tracker etc.	Microsoft Power BI	Tracking over time for specific use cases that require flexibility beyond "Explore" dashboards	M	Leaders or program managers	Yes
Tools to kickstart deeper exploration and custom analysis	4	Workplace Analytics analysis kickstart: Ways of working assessment	Microsoft Power BI	A broad scan of collaboration culture, good for engaging leaders with selected charts and insights for their group	M	Business/function leaders	Yes
	5	Custom Workplace Analytics analysis and reporting	Custom	Export row-level Workplace Analytics data to analyze or visualize in other applications (Excel, Power BI, R, Python, etc.)	H	Analysts (on behalf of leaders)	Yes
To help individual employees manage their own time and networks	6	Workplace Analytics Plans	Workplace Analytics ; MyAnalytics	Tracking progress towards goals for after hours, focus, and meeting hours as a team	M	Individual employees as a team	N/A
	7	MyAnalytics	Outlook add-in, MyAnalytics	Smart assistance and habit tracking	L	Individual employees	N/A

<https://docs.microsoft.com/en-us/viva/insights/Tutorials/power-bi-intro>

- Client love PBI Demos
- If I turn on WpA analytics with license , in 2 weeks you can get data about your organization.
- This is plain Vanilla implementation.
- Client is already overwhelmed .

Ways of working assessment

<https://docs.microsoft.com/en-us/viva/insights/Tutorials/power-bi-collab-assess>



- Minimum of 90 days of reassignment
[Commercial Licensing Terms \(microsoft.com\)](https://www.microsoft.com/commerciallicensing/terms)

change during Customer's subscription for that Online Service. When Microsoft introduces software that are new (i.e., that were not previously included with the subscription), Microsoft updates to the terms that apply to Customer's use of those new features, supplements or related software.

Electronic Notices

Microsoft may provide Customer with information and notices about Online Services electronically, including via email, through the portal for the Online Service, or through a web site that Microsoft identifies. Notice is given as of the date it is made available by Microsoft.

Licensing the Online Services

Customer must acquire and assign the appropriate subscription licenses required for its use of each Online Service. Each user that accesses the Online Service must be assigned a User SL or access the Online Service only through a device that has been assigned a Device SL, unless specified otherwise in the Online Service-specific Terms. [Subscription License Suites](#) describes SL Suites that also fulfill requirements for User SLs. Customer has no right to use an Online Service after the SL for that Online Service ends.

License Reassignment

Most, but not all, SLs may be reassigned. Except as permitted in this paragraph or in the Online Service-specific Terms, Customer may not reassign an SL on a short-term basis (i.e., within 90 days of the last assignment). Customer may reassign an SL on a short-term basis to cover a user's absence or the unavailability of a device that is out of service. Reassignment of an SL for any other purpose must be for the remaining term of that License. When Customer reassigns an SL from one device or user to another, Customer must block access and remove any related software from the former device or from the former user's device.

Multiplexing

Hardware or software that a Customer uses to:

- pool connections or reduce the number of OSE's, devices, or users a Product directly manages;
- reduce the number of devices or users that directly or indirectly access or use a Product;
- or access data a Product itself processes or generates;

Watch video [Part 3: Insights to Action](#) (28 min)

What may customers need help with?

What may customers need help with?

- 1 Can you help me identify where there is an **opportunity** to improve work culture?
- 2 Can you help me identify which **groups** to target for change?
- 3 Can you help ensure that we leverage **M365 tools** to drive change?
- 4 Can you help provide me with **change tactics** that are specific to my organization's culture?
- 5 Can you help me measure the **effectiveness** of my change interventions?

Step 1: Identify opportunities

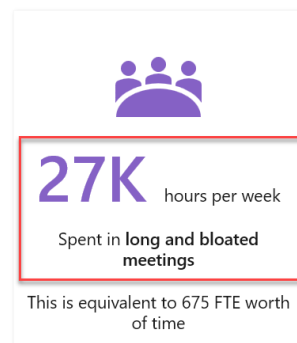
Case Study: A Global FinTech Company

Case Study: A Global FinTech Company

After analysis, the customer identified two key opportunities that were prioritized



Identify Priorities



What else might you consider selling?

What else might you consider selling?

Partner Support	
Type of Service	Description
 Analytics Diagnostic	Provide a quick analysis that builds on existing dashboards and identifies quick win opportunities
 Analytics Service	Provide a larger services package that enables the analysis of collaboration behaviors with further customization, and additional scenarios
 Qualitative Service	Provide the opportunity to augment quantitative data with stakeholder interviews, surveys, and qualitative research

Step 2: Determine change readiness & pilot populations

Case Study: A Global FinTech Company

The customer identified two pilot groups to drive measurable change



Priorities

- Increase manager mentoring and coaching
- Free up and spend less time in unnecessary meetings



Target Population

Selection Criteria

Opportunity for Improvement

Influence

Sponsorship for Change

Capacity for Change

Privacy Compliant

Pilot Group 1



Pilot Group 2



What else might you consider selling?

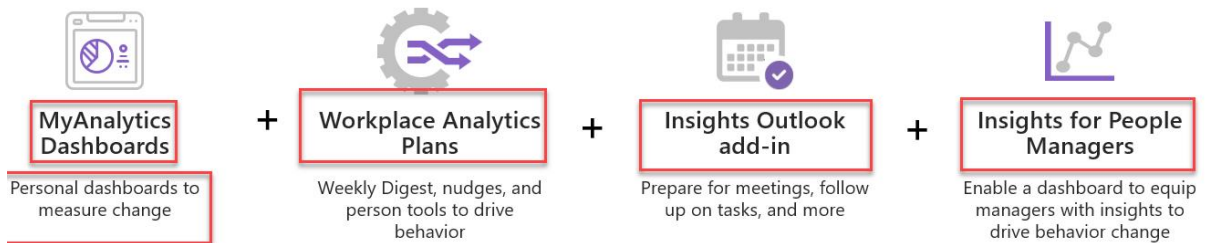
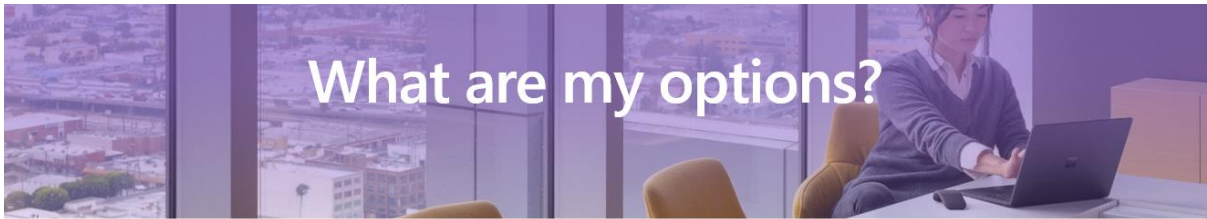


What else might you consider selling?

Partner Support	
Type of Service	Description
 Change Readiness Assessment	Help identify which groups have readiness for change
 Change Strategy	Identify key stakeholders, target populations, and strategy to drive change

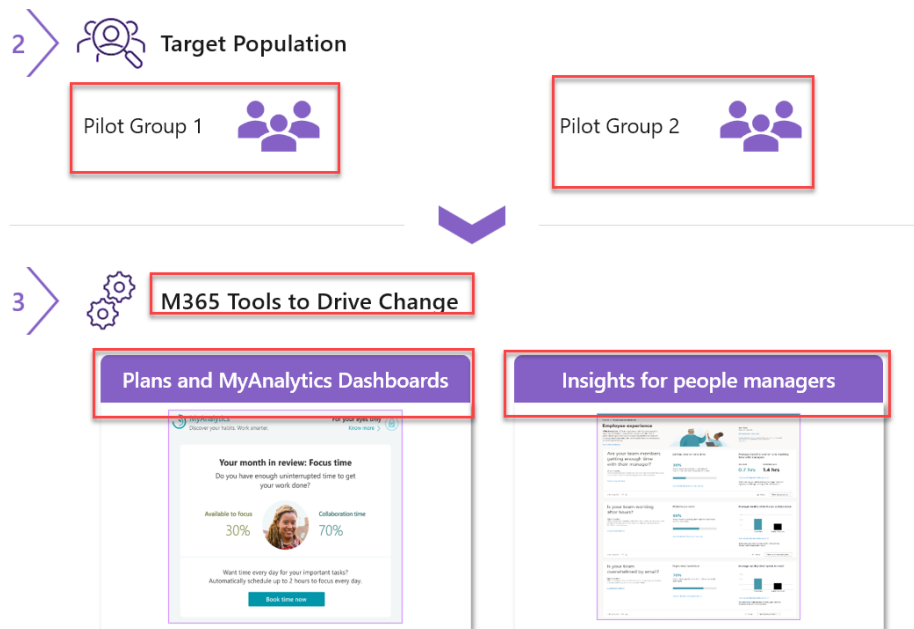
Step 3: M365 tools to drive change

What are my options?



Case Study: A Global FinTech Company

Work with the customer to enable M365 tools



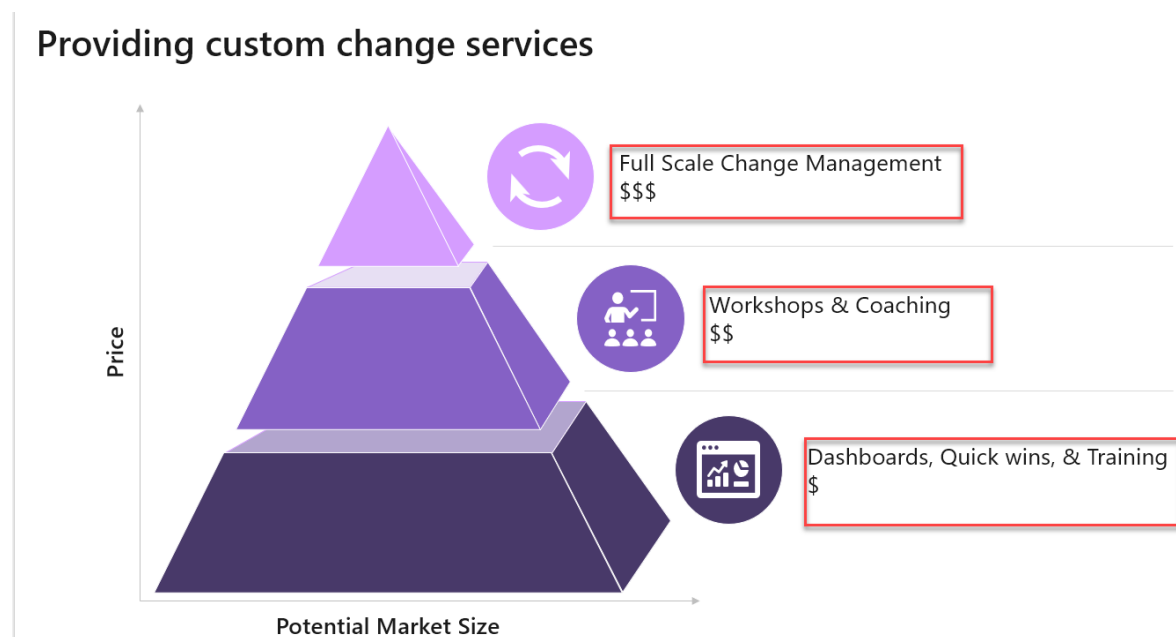
What else might you consider selling

What else might you consider selling?

Partner Support	
Type of Service	Description
 Communication Plans	Help the customer develop the right way to rollout and communicate about M365 tools including how to communicate the value and navigate privacy conversations
 Training & Onboarding Service	Provide training on M365 tools and help customers launch product features to maximize adoption

Step 4: Designing custom change interventions

Providing custom change services



Case Study: A Global FinTech Company

Help the customer
design custom
interventions
through a change
workshop

3 >



M365 Tools

The customer wanted to go beyond the M365 tools and asked for tailored assistance

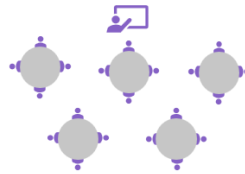


4 >



Custom Change Interventions

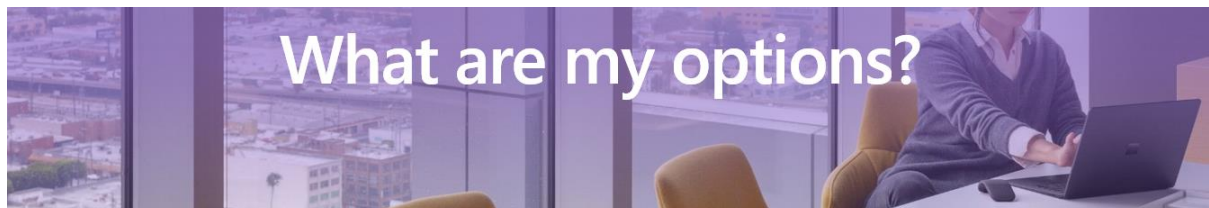
Change Champions or Business Unit Sponsors that represent the target population were invited to a workshop



New Champion
behaviors and change
tactics identified



Step 5: Measure and operationalize



In-Product Metrics

M365 tools such as insights for people manager dashboard help you share insights

Customizable



PowerBI Templates

Pre-built and designed to measure effectiveness of change interventions

Customizable



Custom Dashboards

WpA queries can be used to develop custom dashboards

Customizable



Case Study: A Global FinTech Company

Help the customer
measure and
operationalize



4



Custom Change Interventions

New Champion behaviors and change tactics identified



5



Operationalize

Custom Dashboards



Champion Forums



6



Measure and Iterate

After one month

Lengthy Meetings

Employees meeting coaching goal

Pilot Group 1	- 11%	+26%
Pilot Group 2	- 5%	+11%

What else might you consider selling?



What else might you consider selling?

Partner Support

Type of Service

Description



Data Operationalization

Integrate Workplace Analytics data into existing dashboards or build new tools to surface insights

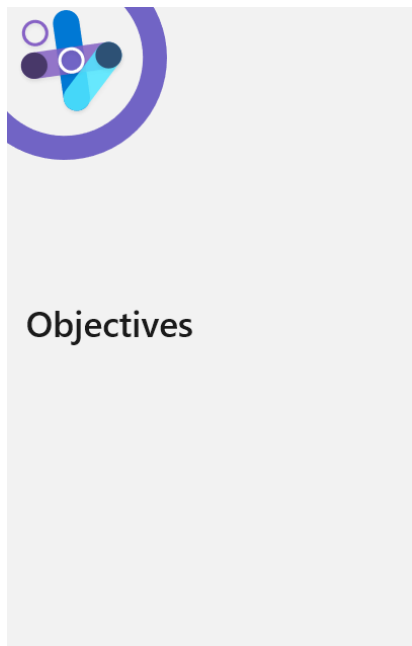


Retainer Services

Ongoing monitoring and reporting of metrics with custom recommendations to drive improvements

Watch video [Part 4: Privacy and Trust](#) (31 min)

Objectives



Introduce core concepts for Privacy, Security, and TRUST for WpA



Show where to find further resources and documentation

Our goal is not to make you an expert today, but to equip you to find out more about how to manage this important conversation with customers and where to go when you need help

Customers may expose themselves to risks in the way they handle the data and insights

Customers may expose themselves to risks in the way they handle the data and insights

Illustrative Customer Asks

“ I'd like to see data at **the individual level** to identify our key influencers ”

“ We should **provide managers these data** on each person in their organization ”

What concerns could employees have?

- Why do you want to know who's an influencer?
- What else are you doing with this data?
- If I'm not an influencer, will I be fired?

- Are you spying on us?
- What will my manager do with this data?
- Do I need to hit certain collaboration metrics to keep my job / get promoted?

Risks to customer

- Legal risks from misuse of data, violation of local laws (e.g., GDPR, CCPA),
- Reputational risks from misuse of data, employee profiling, or perception of surveillance
- Culture risk from the type of culture the customer is creating

Risks to us

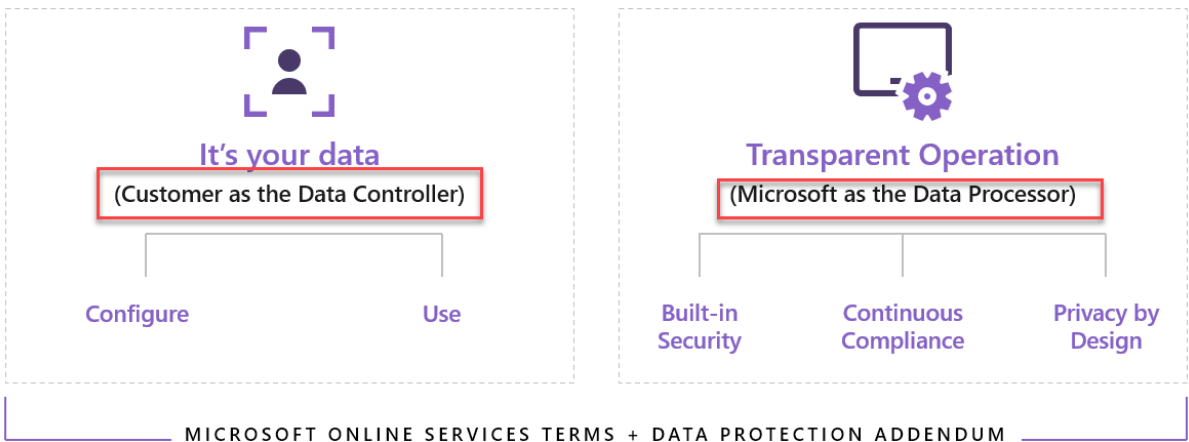
- Reputational risk from a customer misusing our insights and product for unethical or ethically questionable purposes

Earning Trust is a shared responsibility

- Customer is Data Controller
- MS is data controller
- Microsoft Online services terms + data protection
[Commercial Licensing Terms \(microsoft.com\)](https://www.microsoft.com/en-us/commercial-licensing/terms)

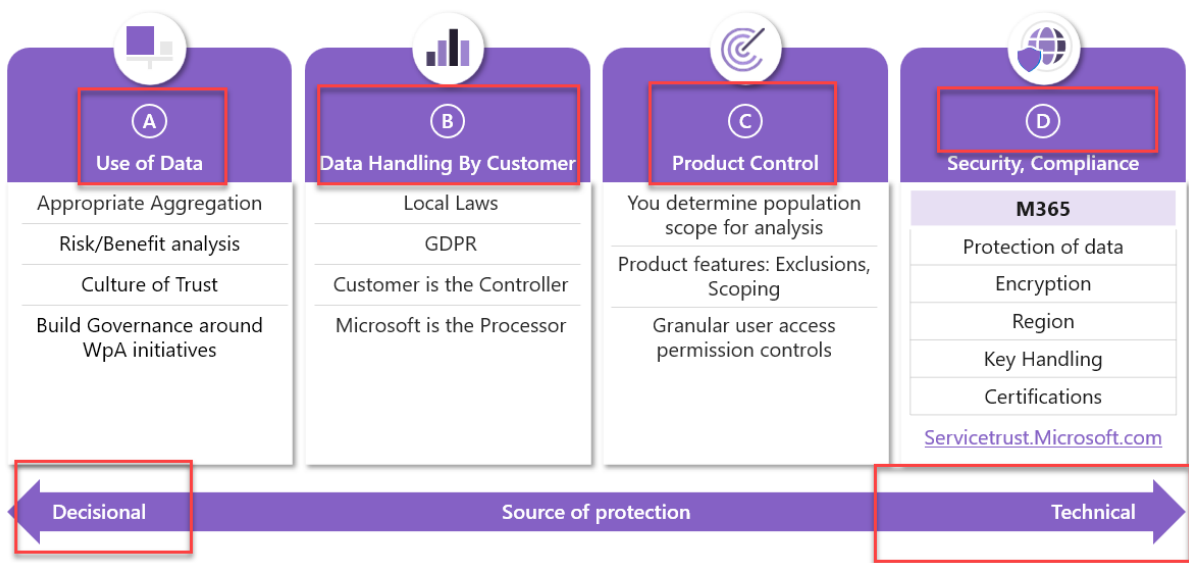
Workplace Analytics Compliance and Privacy Framework

Earning Trust is a shared responsibility



Workplace Analytics Compliance and Privacy Framework

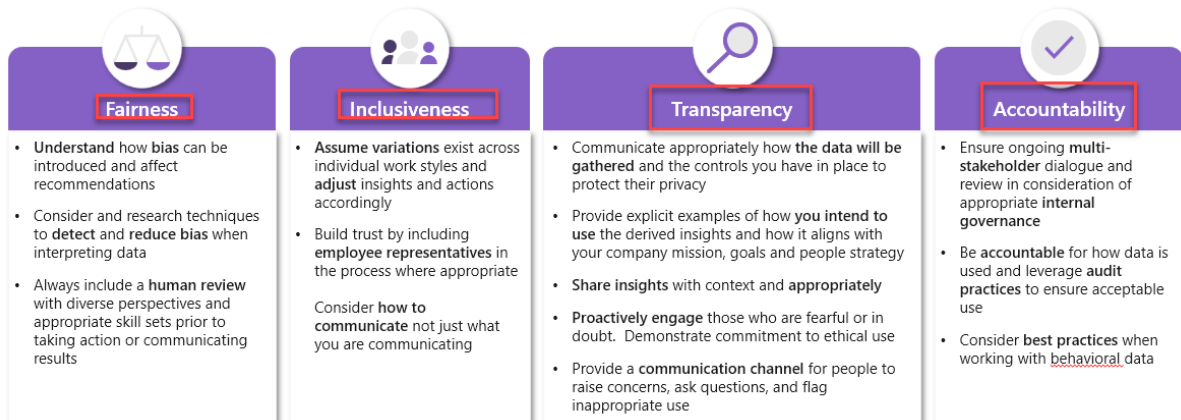
Workplace Analytics Compliance and Privacy Framework



The workplace intelligence trust framework helps customers think about how to properly use the data and analysis

USE OF DATA

A The workplace intelligence trust framework helps customers think about how to properly use the data and analysis



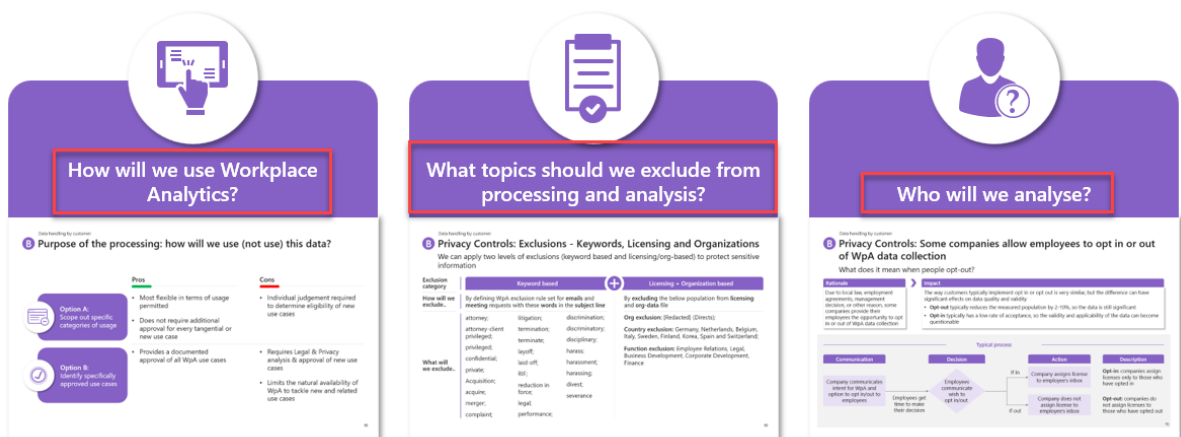
Discussion questions

- What can you do if you think your customer will use WpA in a way that is risky to them and us?
- How can you confirm your intuition?

Customers make their own decisions about processes, scope, and handling of the data and analysis

Data handling by customer

B Customers make their own decisions about processes, scope, and handling of the data and analysis



Purpose of the processing: how will we use (not use) this data?

B Purpose of the processing: how will we use (not use) this data?

	Pros	Cons
 Option A: Scope out specific categories of usage	• Most flexible in terms of usage permitted • Does not require additional approval for every tangential or new use case	• Individual judgement required to determine eligibility of new use cases
 Option B: Identify specifically approved use cases	• Provides a documented approval of all WpA use cases	• Requires Legal & Privacy analysis & approval of new use cases • Limits the natural availability of WpA to tackle new and related use cases

Privacy Controls: Exclusions - Keywords, Licensing and Organizations

B Privacy Controls: Exclusions - Keywords, Licensing and Organizations

We can apply two levels of exclusions (keyword based and licensing/org-based) to protect sensitive information

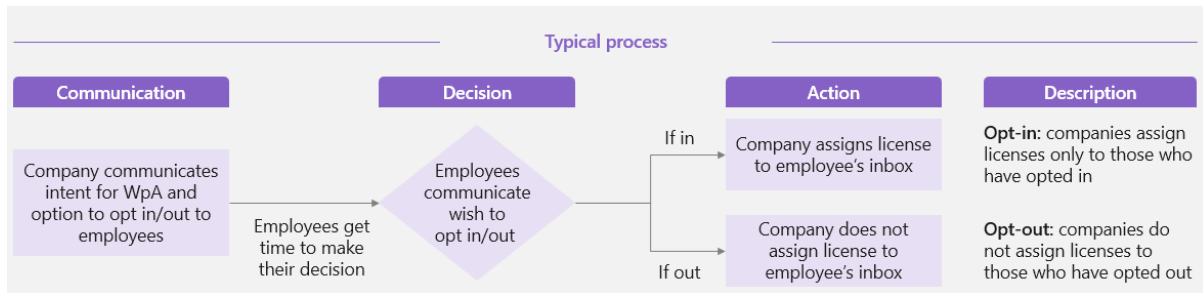
Exclusion category	Keyword based	Licensing + Organization based																														
How will we exclude..	By defining WpA exclusion rule set for emails and meeting requests with these words in the subject line	By excluding the below population from licensing and org-data file																														
What will we exclude..	<table border="0"> <tr> <td>attorney;</td><td>litigation;</td><td>discrimination;</td></tr> <tr> <td>attorney-client</td><td>termination;</td><td>discriminatory;</td></tr> <tr> <td>privileged;</td><td>terminate;</td><td>disciplinary;</td></tr> <tr> <td>privileged;</td><td>layoff;</td><td>harass;</td></tr> <tr> <td>confidential;</td><td>laid-off;</td><td>harassment;</td></tr> <tr> <td>private;</td><td>RIF;</td><td>harassing;</td></tr> <tr> <td>Acquisition;</td><td>reduction in</td><td>divest;</td></tr> <tr> <td>acquire;</td><td>force;</td><td>severance</td></tr> <tr> <td>merger;</td><td>legal;</td><td></td></tr> <tr> <td>complaint;</td><td>performance;</td><td></td></tr> </table>	attorney;	litigation;	discrimination;	attorney-client	termination;	discriminatory;	privileged;	terminate;	disciplinary;	privileged;	layoff;	harass;	confidential;	laid-off;	harassment;	private;	RIF;	harassing;	Acquisition;	reduction in	divest;	acquire;	force;	severance	merger;	legal;		complaint;	performance;		Org exclusion: [Redacted] (Directs); Country exclusion: Germany, Netherlands, Belgium, Italy, Sweden, Finland, Korea, Spain and Switzerland; Function exclusion: Employee Relations, Legal, Business Development, Corporate Development, Finance
attorney;	litigation;	discrimination;																														
attorney-client	termination;	discriminatory;																														
privileged;	terminate;	disciplinary;																														
privileged;	layoff;	harass;																														
confidential;	laid-off;	harassment;																														
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acquire;	force;	severance																														
merger;	legal;																															
complaint;	performance;																															

Privacy Controls: Some companies allow employees to opt in or out of WpA data collection

B Privacy Controls: Some companies allow employees to opt in or out of WpA data collection

What does it mean when people opt-out?

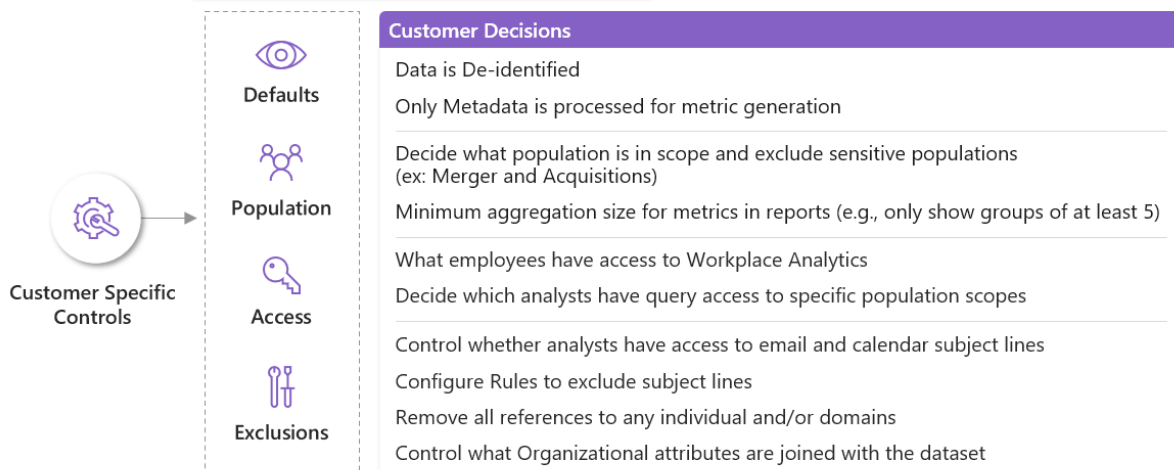
Rationale	Impact
Due to local law, employment agreements, management decision, or other reason, some companies provide their employees the opportunity to opt in or out of WpA data collection	The way customers typically implement opt in or opt out is very similar, but the difference can have significant effects on data quality and validity Opt-out typically reduces the measured population by 2-10%, so the data is still significant Opt-in typically has a low rate of acceptance, so the validity and applicability of the data can become questionable



Customers decide what privacy options to use when configuring Workplace Analytics

C Customers decide what privacy options to use when configuring Workplace Analytics

Configurable Privacy Policies for Workplace Analytics



Screenshot from WpA Drivers and Controls Dashboard <https://aka.ms/wpacontrols>

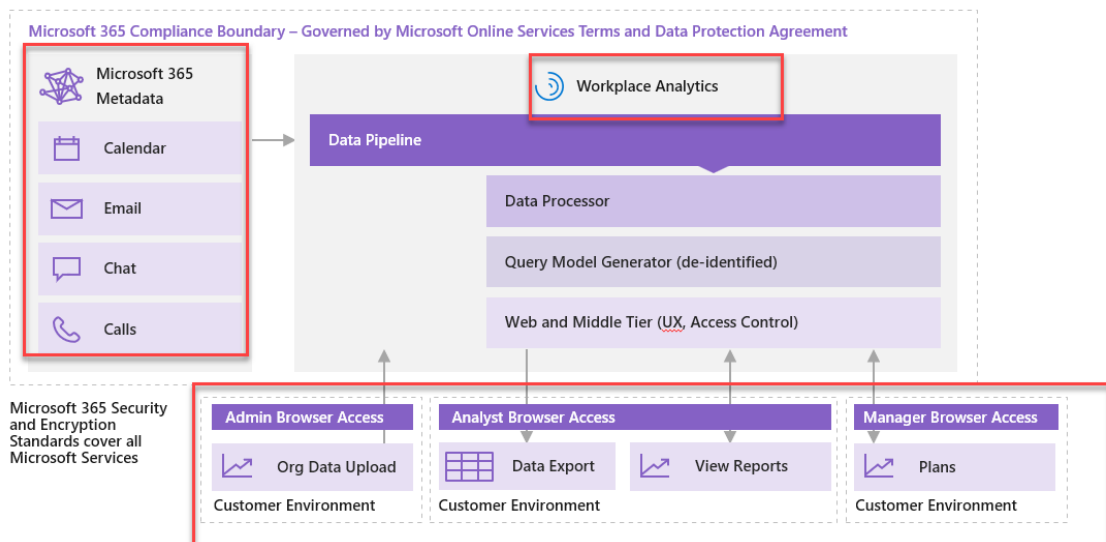
Each role has its own visibility and permissions

C Each role has its own visibility and permissions

	Settings Options	Explore Dashboard	Flexible Queries	Plans
Administrator	✓			
Analyst		✓	✓	
Analyst Limited		✓		
Program Manager				✓
Group Manager				✓

Data processing and storage remains within the M365 Compliance Boundary and with same security/encryption standards as M365

D Data processing and storage remains within the M365 Compliance Boundary and with same security/encryption standards as M365



Sourced from M365 TRUST Deck

This training is only the start - refer to these resources for the answering TRUST and privacy questions

This training is only the start - refer to these resources for the answering TRUST and privacy questions

Resource	Description	Microsoft reference	Partner reference
WpA TRUST Site	Internal site for TRUST and privacy resources	http://aka.ms/wpatrust	Request access to http://aka.ms/wpatrust
Microsoft Online Services Terms (OST)	Contract governing all Microsoft Online Services	Licensing Terms Microsoft Volume Licensing	Licensing Terms Microsoft Volume Licensing
Microsoft OST Data Protection Addendum	Microsoft responsibilities	Microsoft Volume Licensing - Product Licensing Search	Microsoft Volume Licensing - Product Licensing Search
Privacy in product documentation	An overview of data-protection and privacy in WpA	Data-protection in Workplace Analytics -- Introduction - Workplace Intelligence Microsoft Docs	Data-protection in Workplace Analytics -- Introduction - Workplace Intelligence Microsoft Docs
WpA Privacy & Security deck	Details of how WpA is configured to protect privacy and security	http://aka.ms/wpatrust	Request access to http://aka.ms/wpatrust
WpA TRUST deck	Framework for conversing on TRUST and WpA implementation	http://aka.ms/wpatrust	Request access to http://aka.ms/wpatrust
WpA TRUST Bot	Chatbot to answer questions and path for escalation	http://aka.ms/wpatrust	Not available outside of Microsoft

Module 3: Viva Insights Workshop

Read through the [How-to Guide to Viva Insights Workshop](#) to understand the objectives of a Viva Insights Workshop

Watch video [Part 1: Workshop preparation and customer journey](#) (51 min)

Agenda for Day 3: Transformation Workshop

Agenda for Day 3: Transformation Workshop	Workshop Preparation	Review Objectives, best practices, roles, and preparation tips	30 min	Transformation Workshop – Toolkit.pptx (section 'READ ME', 'Agenda', 'WpA Overview', 'Organizational Resilience with WpA')
	Customer Journey and Goals	How customers adopt & scale WpA + business goal alignment	30 min	Transformation Workshop – Toolkit.pptx (section 'WpA Customer Journey and Goals')
	Break		10 min	
	WpA Outcomes	Review of WpA outcomes and sample supporting analyses	45 min	Transformation Workshop – Toolkit.pptx (slides 34-173) (section 'Introduction to WpA Outcomes' + 9 outcome sections)
	Break		10 min	
	WpA Business Case	Review the steps to develop a business case for WpA	25 min	Transformation Workshop – Toolkit.pptx (section 'WpA Business Case Development', 'DISCOVERY', 'COMMUNICATION') WpA Business Case Calculation.xlsx
	Workshop Follow-Ups	How to proceed after the workshop	10 min	Transformation Workshop – Toolkit.pptx (section 'WpA Services', 'Next Steps')
	Closing Q&A		20 min	

Guidance for review of WpA outcomes and example analyses

Guidance for review of WpA outcomes and example analyses

INTERNAL USE ONLY

There are 9 sub-sections grouping example analyses by WpA outcomes. See the following slide that maps the Organizational Resiliency framing to the 9 outcomes.

1. Enhance organizational resiliency

2. Boost employee engagement

3. Improve agility

4. Foster innovation

5. Develop effective managers

6. Enhance operational effectiveness

7. Transform meeting culture

8. Accelerate change

9. Increase customer focus

There are additional sections detailing specific WpA capabilities for:

1. Return to worksites (and the related PowerBI dashboard)

2. Diversity and inclusion

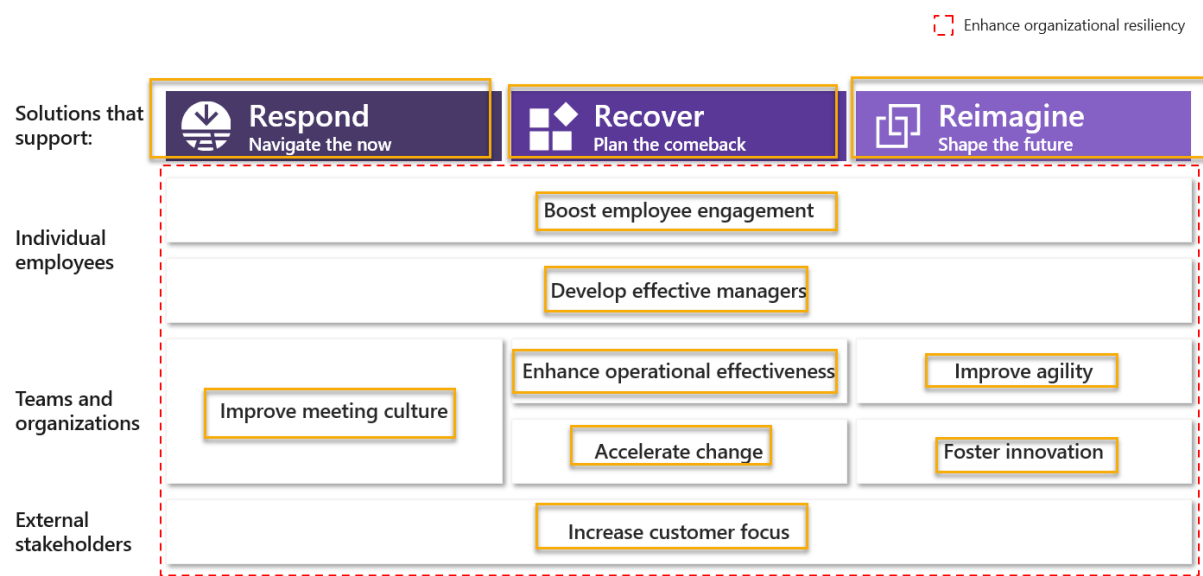
DO NOT present all of these examples to the customer! Pre-select 2-4 outcomes that will resonate with the customer based on your previous conversations leading up to the workshop.

Analyses are marked as **Rapid Insights** if we have generally seen WpA customers successfully produce these queries/views on their own. Customers may still want/need services to deliver these analyses depending on the skill and capacity of their internal resources.

Analyses are marked as **Advanced Scenarios** if we have generally seen WpA customers require support from Microsoft or an external partner to successfully produce these queries/views. Customers may opt out of services to deliver these analyses depending on the skill and capacity of

Workplace Analytics supports leaders to improve business outcomes

Workplace Analytics supports leaders to improve business outcomes



Boost employee engagement

Boost employee engagement

Boost retention, job satisfaction and performance through coaching, empowerment, and workload management

Insights developed for business leaders

Answers to pressing questions

Building the business case

- CHRO/CPO | Director of People Analytics | Line of Business leaders
- What is the threshold for burnout?
- What activities are driving after hours work?
- How much time is diverted to activities outside team members' focus areas?
- Are "Flex" practices having a measurable impact on how our people are working?
- Is our level of collaboration harming engagement and efficiency?
- Boosting employee engagement can lead to business value via:
 - **Increasing capacity for work:** After-hours collaboration
 - **Optimizing employee productivity:** Manager coaching; Team cohesion
 - **Improving employee autonomy:** Manager co-attendance

Generate rapid insights

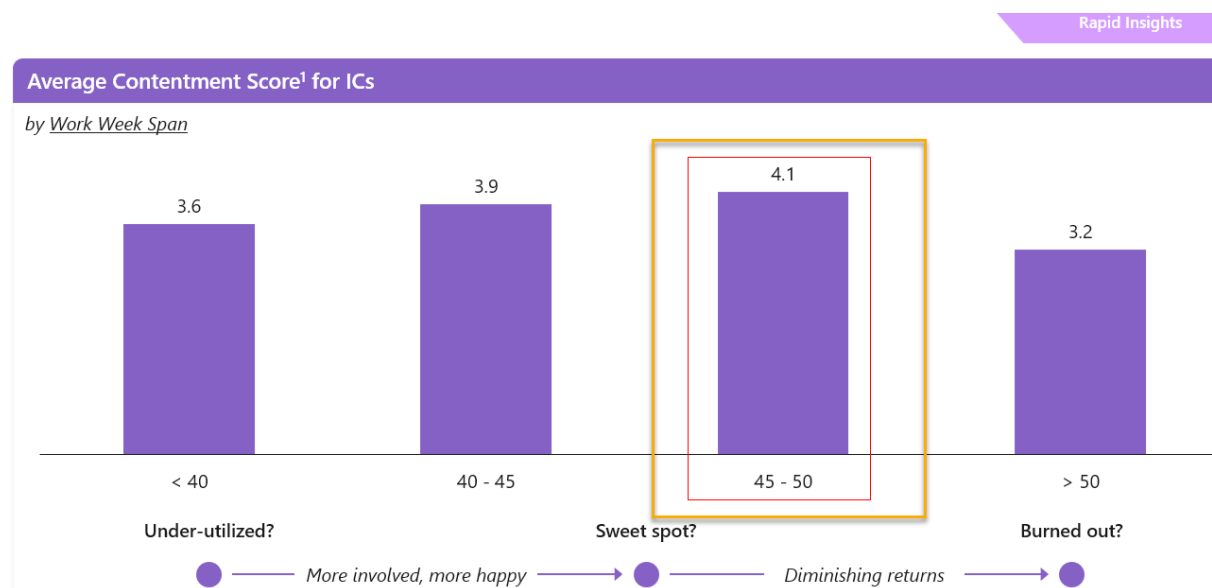
Workplace Analytics Insights

Power BI templates:

- Collaboration overload
- Manager impact
- Ways of working assessment
- Ways of working tracker

Teamwork plans & personal insights

What is the threshold for burnout?



Which daily behaviors are correlated with positive work perceptions?

Boost employee engagement

Advanced Scenarios

Engagement Survey / Workplace Analytics Metrics Correlation Matrix					
		KPIs significantly correlated to survey response:			
Theme	Workplace Analytics KPI	Engagement	Innovation	Enablement	
Meeting Sprawl	% Meeting hours with 21+ attendees	↓	↓	↓	Positive Correlation
	% Recurring Meetings		↓		
Manager Access	Manager conflicting meeting rate	↓	↓	↓	Negative Correlation
	% Meeting Hours with Manager			↑	
Network Growth	Network Insularity	↓	↓	↓	
	Manager's Internal Network Growth	↑	↑	↑	

Increase customer focus

Increase customer focus

Companies that prioritize customer relationships and satisfaction can grow revenue 2.5 times faster than their competitors

Insights developed for business leaders

- VP of Sales Ops | CCO, CRO, COO | Chief Data Officer

Answers to pressing questions

- How connected are our sales reps to key sources of customer insight & product expertise?
- How are my salespeople allocating their time internally?
- Are our sellers being impacted by long or large meetings?
- How well are we managing the scope of our key relationships?
- What do our best sellers do differently than their peers?

Building the business case

- Increased customer focus can lead to business value via:
 - Improving sales effectiveness: Manager coaching
 - Maximizing sales efficiency: External collaboration
 - Increasing customer satisfaction: Internal network size
 - Enhancing customer engagement: Internal network breadth

Generate rapid insights

Workplace Analytics Insights

Power BI templates:

Sales business continuity

How connected are our sales reps to key sources of customer insight & product expertise?

How connected are our sales reps to key sources of customer insight & product expertise?

Increase customer focus

Rapid Insights

Collaboration Time Allocation¹ between key functions and sales regions

	n =	Product	Mktg	Legal	Region 1	Region 2	Region 3	
Product	47	45%	13%	21%	2%	7%	11%	How to Read: Product Management spends 11% of its overall collaboration time with sales reps assigned to Region 3
Marketing	115	9%	52%	20%	2%	11%	6%	
Legal	221	9%	13%	31%	13%	18%	16%	
Region 1	27	3%	14%	19%	61%	2%	2%	
Region 2	53	7%	18%	22%	2%	44%	7%	
Region 3	90	11%	10%	15%	2%	7%	56%	

Related Metrics			
# People Connected	Generated Workload	Generated Workload Received	Hours per Person

¹ Collaboration Hours – total time spent in meetings and sending / receiving emails that are returned by search query referenced. Rows in graphic sum to 100%, representing all collaboration for individuals at that row's brand

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Soft Skills are important

How does teaming model efficiency vary across account tiers?

How does teaming model efficiency vary across account tiers?

Increase customer focus

Advanced Scenarios

Account Distribution by FY19 Net New Sales

% of total collaboration hours invested by key sales roles

Account Tier by FY19 Net New Sales	Top 3 Teaming Models per Account Tier (% accounts covered)	How much sales value can each model drive?		How efficient is each model?		
		Avg FY19 Sales per Account per Teaming Model		Avg \$Sales/ Hour per Acct. per Teaming Model		
Top 10% Accounts (97)	 55%					 FLS (Incl. Dir)
	 25%					 Sales Engineer
	 5%					
Middle 80% accounts (779)	 37%					 Other Support
	 15%					
	 13%					
10% Long Tail Accounts (97)	 46%					
	 13%					
	 9%					
Top 50 New Logos (50)	 24%					
	 18%					
	 16%					

Return to worksites

Return to worksites

Inform the limited capacity plans for each worksite with an objective, data-driven approach

Insights developed for business leaders

- Post-COVID “re-entry” team – a cross-functional team composed of HR, Real Estate, Strategy, Legal, Compliance and Risk - responsible for limited capacity “soft” openings of each worksite around the globe

Answers to pressing questions

- Which teams to bring back first to each worksite?
- Which teams can continue working remotely?
- How to schedule alternating shifts to optimize for office collaboration?
- What should the seating map look like?
- What are the meeting usage needs at each capacity constrained worksite?

Building the business case

- Optimizing the return to each office building or worksite can lead to business value via:
 - **Optimizing employee productivity:** Manager coaching, Team cohesion, influencer presence and reach
 - **Accelerating speed to market:** Information flow, cross-group collaboration

Generate rapid insights

Power BI templates:

Return to Worksites

Workplace Analytics provides an objective and data-driven

Workplace Analytics provides an objective and data-driven approach for worksite-reentry coordinators, informing their limited capacity plans for each worksite.

Limited-capacity worksite challenges	What Workplace Analytics informs	How?
Who?	Team-based seat allocation optimized for co-located collaboration for each worksite	Use <i>Return to worksites</i> Power BI template
When?*	Alternating shifts schedule that optimizes cross-team collaboration with colleagues on the same shift	Run work-site specific analyses following the <i>Return to worksites</i> Playbook
Where?*	A floor plan optimized for cross-team collaboration	
How?	Meeting room usage projections that ensure employees interact safely	

How to decide who should return to each worksite?

How to decide who should return to each worksite?

Prioritize teams* that collaborate extensively with their co-located colleagues to perform their jobs.

Allowing team leaders to take into account the personal circumstances of individual team members and their ability to



Weekly collaboration hours with co-located colleagues

Example:



Project Manager Amy

Coordinates projects primarily with off-site collaborators

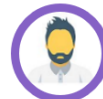
Weekly collaboration hours: 24
Weekly collaboration with co-located employees: 4

4

Amy

15

Jay



Product Developer Jay

Collaborates extensively with co-located colleagues

Weekly collaboration hours: 18
Weekly collaboration with co-located employees: 15

The underlying premise

Teams that spend more time collaborating with co-located employees benefit more from returning to the workplace

The Workplace Analytics Return to worksites Power BI template

The Workplace Analytics *Return to worksites* Power BI template provides two options to create a limited capacity seat allocation plan

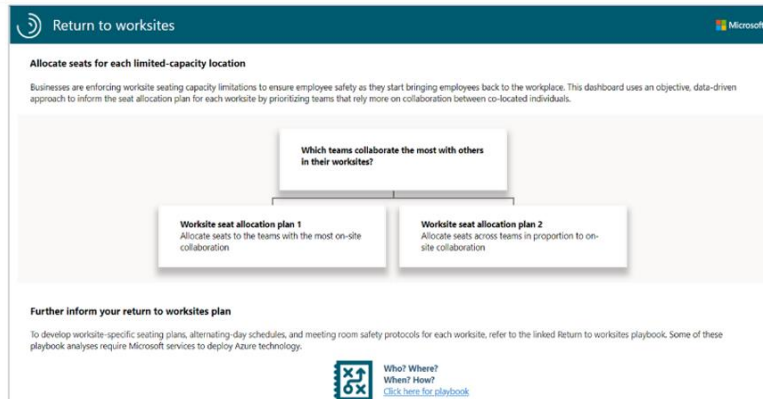
Return to worksites

Rapid Insights

Introductory context describes two seat allocation plan options to address who to return to the worksite:

- **Plan 1:** Allocate seats to the teams with the most on-site collaboration
- **Plan 2:** Allocate seats across teams in proportion to on-site collaboration

You can further inform your plans using the *Return to worksites* playbook, which guides the analyst through additional analyses requiring worksite-specific queries and Microsoft services to deploy Azure technology.



Diversity and inclusion

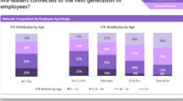
Diversity and inclusion

Measure inclusive leadership, practices and climate of opportunity with an objective, data-driven approach

 Insights developed for business leaders	CHRO/CPO Director of People Analytics Line of Business leaders
 Answers to pressing questions	- How are the organization, leadership and fellow employees creating a sense of belonging for all? - Is leadership role modelling inclusive behaviors? - Are we cultivating and fostering an inclusive and collaborative environment where employees can thrive? - Are we ensuring an equitable path to success for all employees?
 Building the business case	- Building an inclusive organizational culture can lead to business value via: - Optimizing employee productivity: Network breadth and diverse ties, team cohesion, manager coaching, influencer presence and reach, influencer roles

Workplace Analytics measures inclusiveness in your workplace

Workplace Analytics measures inclusiveness in your workplace

	Sample questions	Sample analyses
 Inclusive Leadership Ensure leadership is role-modeling inclusive behaviors and educating the next generation of leaders	- Are leaders maintaining diverse networks? - Role-modeling inclusive behaviors? - Creating shared goals of inclusion?	 
 Inclusive practices Cultivate and foster an inclusive and collaborative environment where employees can thrive	- Are employees participating equitably in high-visibility work? - Can employees choose how and where they work? - Does membership in affinity groups help establish a larger network?	 
 Inclusive climate of opportunity Ensure equitable paths to success for all employees	- Are employees onboarded at same pace? - Gaining access to 'best practice' teams and projects? - Receiving career development opportunities?	 

Click on slide for detail

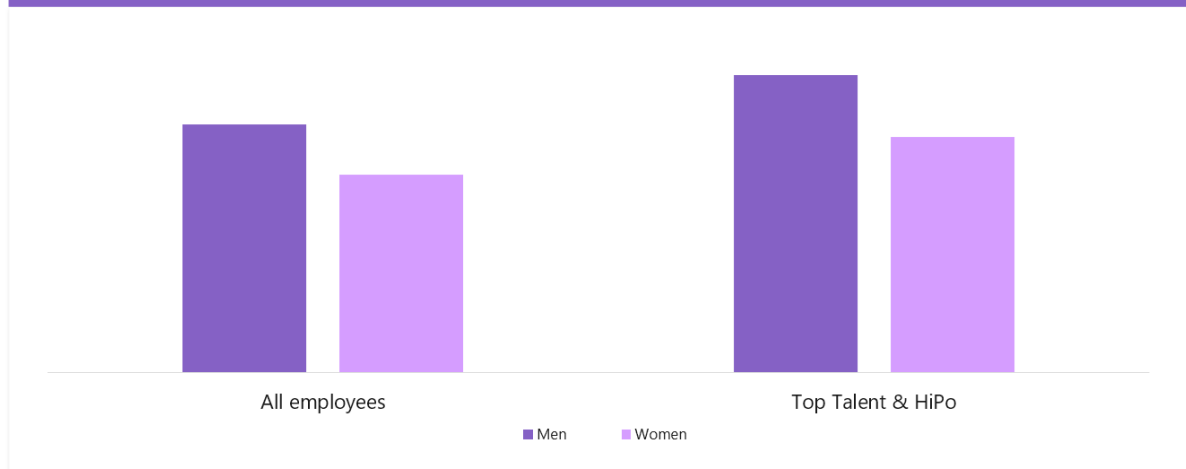
Are leaders equally investing time in employees?

Are leaders equally investing time in employees?

Diversity and inclusion

Rapid Insights

Manager time spent with direct reports



Aligning customer Org Resilience goals to WpA outcomes

Watch video [Part 2: WpA Outcomes](#) (34min)

Guidance for review of WpA outcomes and example analyses

Guidance for review of WpA outcomes and example analyses

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5. Develop effective managers
6. Enhance operational effectiveness
7. Transform meeting culture
8. Accelerate change
9. Increase customer focus

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1. Return to worksites (and the related PowerBI dashboard)
2. Diversity and inclusion

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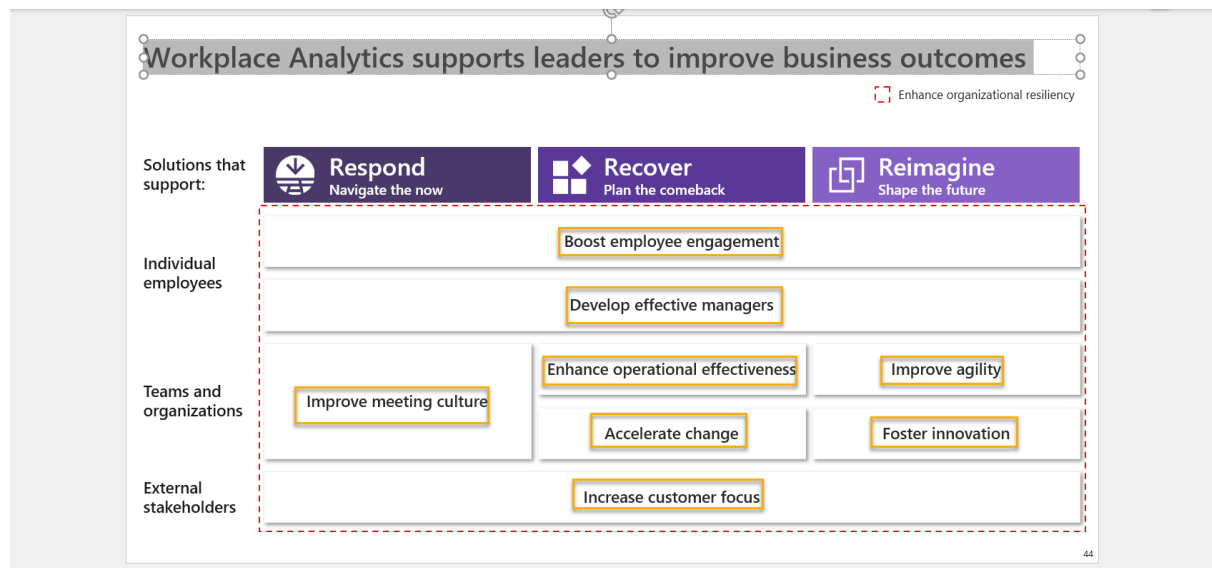
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notes

Workplace Analytics supports leaders to improve business outcomes



Go to 9 different outcomes

01 Viva Insights Workshop - Toolkit_June 2021.pptx

File Home Insert Draw Design Transitions Animations Slide Show Record Review **View**

Normal Outline View Slide Sorter Notes Reading View Slide Master Handout Master Notes Master Ruler Gridlines Guides Notes Zoom Fit to Window Color Grayscale Black and White Color/Grayscale

Organizational Resilience with WpA (7 slides)

WpA Customer Journey and Goals (8 slides)

Introduction to WpA Outcomes (3 slides)

Enhance organizational resiliency (20 slides)

Boost employee engagement (12 slides)

Improve agility (10 slides)

Foster innovation (9 slides)

Develop effective managers (13 slides)

Enhance operational effectiveness (11 slides)

Transform meeting culture (8 slides)

Accelerate change (6 slides)

Increase customer focus (26 slides)

Return to worksites (7 slides)

Diversity and inclusion (9 slides)

How To: aligning goals to outcomes (8 slides)

WpA Business Case Development (3 slides)

WpA Business Case: DISCOVERY (19 slides)

WpA Business Case: COMMUNICATION (9 slides)

WpA Services (2 slides)

Next Steps (2 slides)

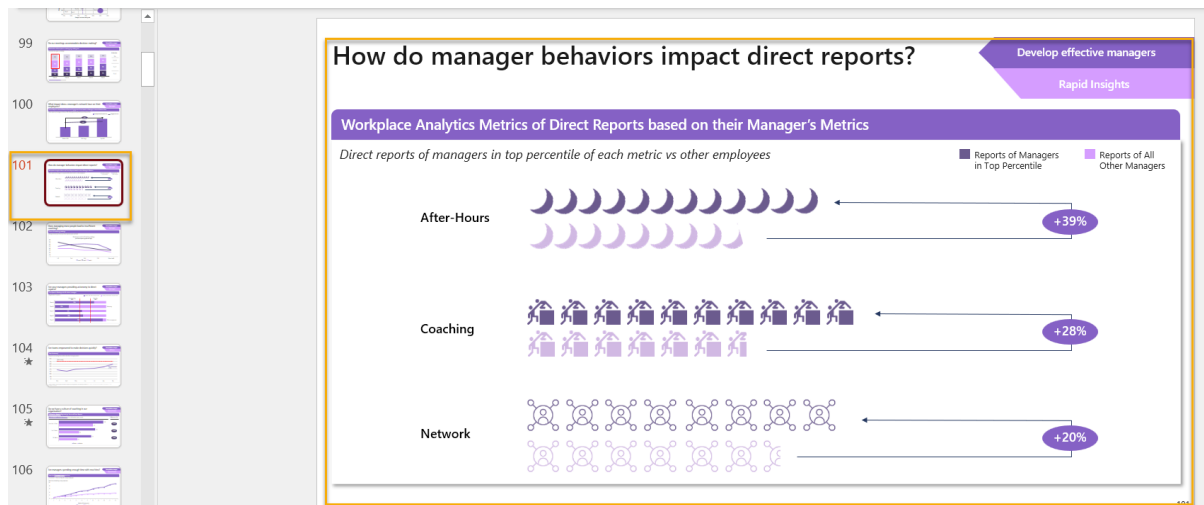
Survey

Enhance organizational resiliency

Navigate business disruptions by responding nimbly, recovering quickly, and reimagining ways of empowering teams and customers

 Insights developed for business leaders	CEO Line of Business leaders CHRO/CPO Director of People Analytics	Generate rapid insights
 Answers to pressing questions	- Do employees have time in the day to focus and get work done? - Do capacity imbalances within team roles create productivity bottlenecks? - What is the threshold for burnout? - How do manager behaviors impact direct reports? - How are managers impacting after hours work?	Business Continuity Report 
 Building the business case	Enhancing organizational resilience can lead to business value via: Increasing capacity for work: After-hours collaboration; Long and large meetings; Total collaboration Optimizing employee productivity: Manager coaching, Team cohesion	Power BI templates: - Business Continuity Dashboard - Sales business continuity dashboard  

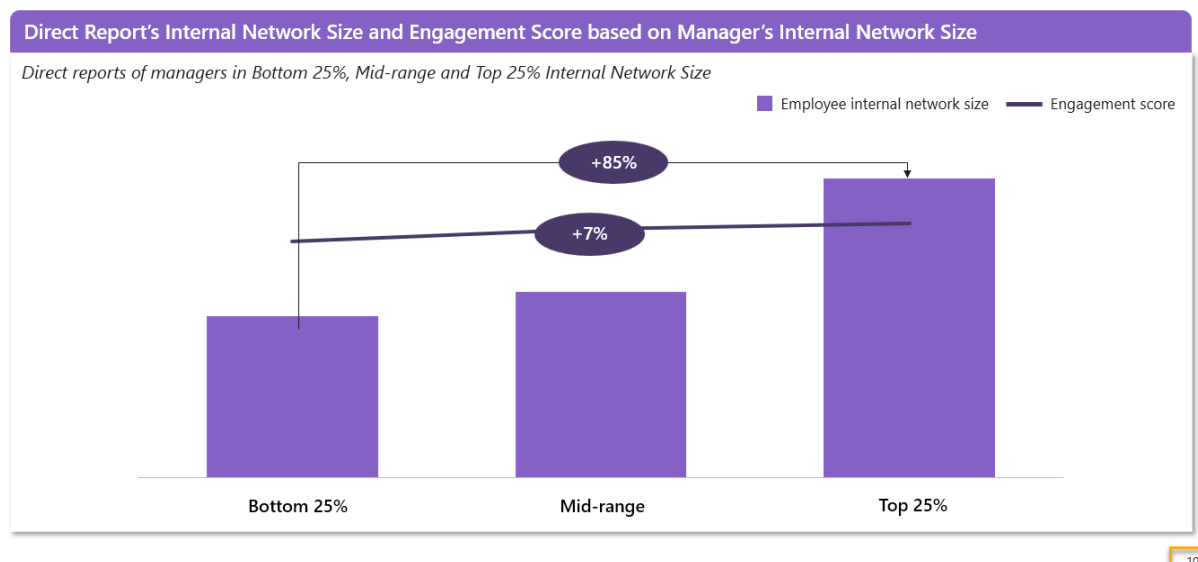
How do manager behaviours impacts direct reports



- Groups of managers only
- WpA 13 months of data.
- You can check month by month.

What impact does a manager's network have on their employees?

What impact does a manager's network have on their employees?



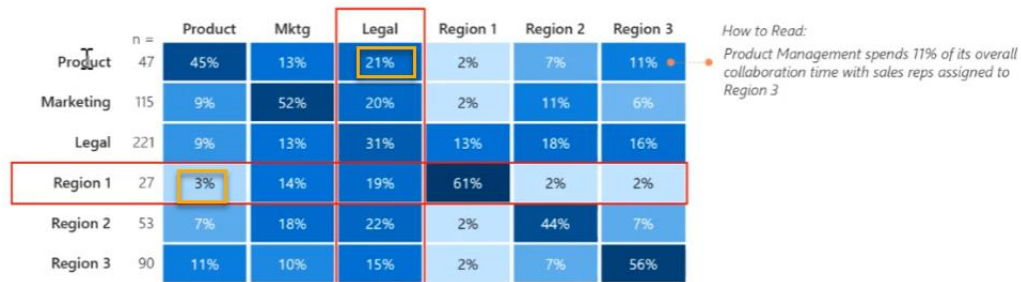
How connected are our sales reps to key sources of customer insights & product expertise

How connected are our sales reps to key sources of customer insight & product expertise?

Increase customer focus

Rapid Insights

Collaboration Time Allocation¹ between key functions and sales regions



Related Metrics			
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Microsoft

Proprietary and Confidential Information

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Are our sellers being impacted by long or large meetings?

Are our sellers being impacted by long or large meetings?

Increase customer focus

Rapid Insights

Internal meeting types by attendees and duration
(% of total time in internal meetings)



Microsoft

Proprietary and Confidential Information

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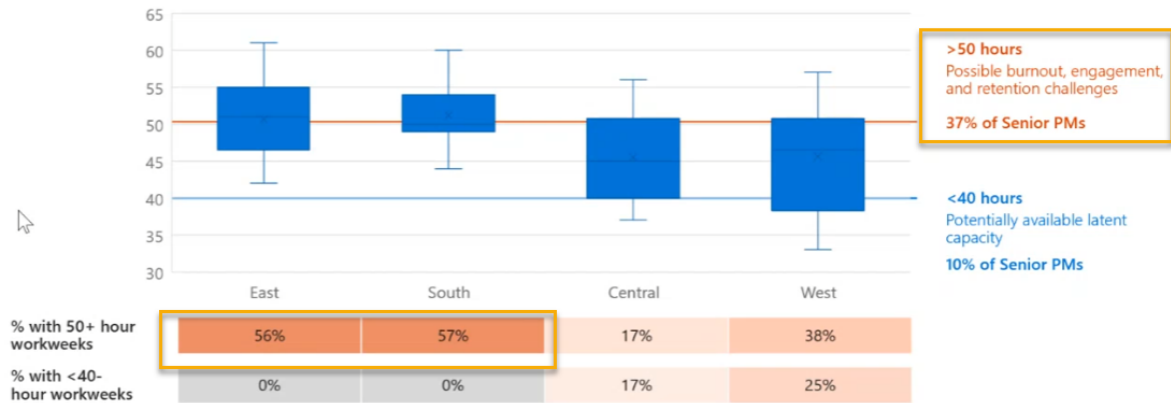
Can we reallocate employees

Can we reallocate employees with similar roles to alleviate overload?

Transform meeting culture

Rapid Insights

Distribution of Senior Project Manager roles
by Work Week Span



Proprietary and Confidential Information

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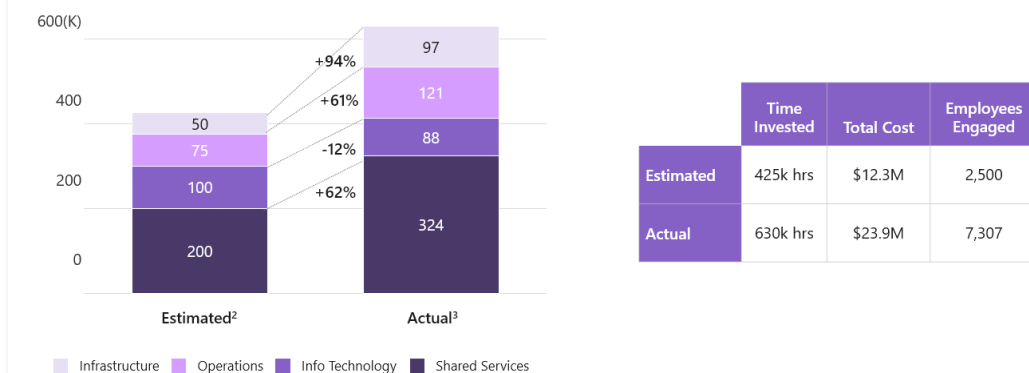
Do our core processes create resource inefficiencies?

Do our core processes create resource inefficiencies?

Enhance operational effectiveness

Advanced Scenarios

Annual Hours Dedicated to Escalations Process (thousands)



¹ Collaboration Hours – total time spent in meetings and sending / receiving emails that are returned by search query referenced

² Estimates are based on Executive Sponsor's estimate of what the time investment "should" be.

³ Actuals are calculated by defining a keyword-based query and summing the time in meetings and emails.

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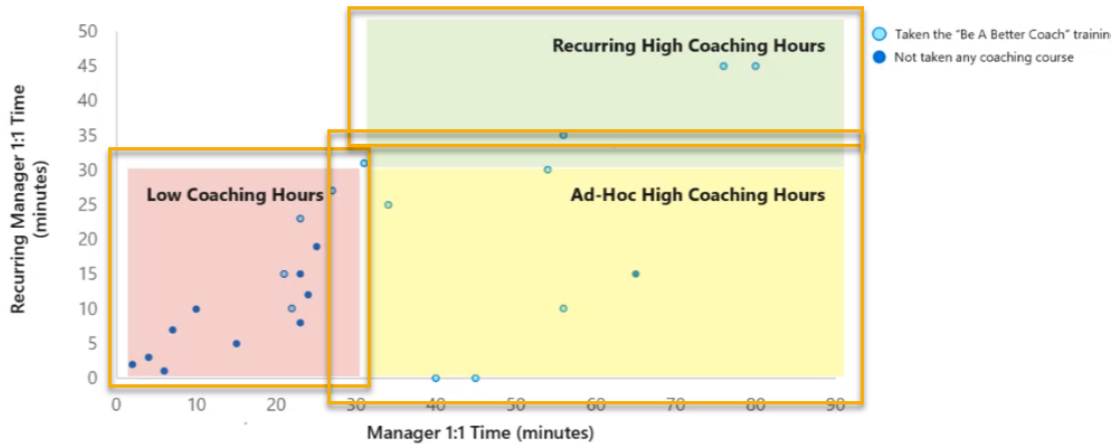
Impact of "Be a better coach" on managers' coaching ability?

Impact of “Be A Better Coach” on manager’s coaching ability?

Develop effective managers

Advanced Scenarios

1:1 coaching time per direct report overall and recurring



Which daily behaviours are correlated with positive work perceptions?

Which daily behaviors are correlated with positive work perceptions?

Enhance operational effectiveness

Advanced Scenarios

Engagement Survey / Workplace Analytics Metrics Correlation Matrix

		KPIs significantly correlated to survey response:			
Theme	Workplace Analytics KPI	Engagement	Innovation	Enablement	
Meeting Sprawl	% Meeting hours with 21+ attendees	↓	↓	↓	
	% Recurring Meetings		↓		Positive Correlation
Manager Access	Manager conflicting meeting rate	↓	↓	↓	
	% Meeting Hours with Manager			↑	Negative Correlation
Network Growth	Network Insularity	↓	↓	↓	
	Manager’s Internal Network Growth	↑	↑	↑	

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Watch video [Part 3: WpA Business Case and Follow-up](#) (48 min)

WpA Business Case Development

WpA Business Case Development



Goal:

- We identify three sequential phases in the crafting of a Business Case: **DISCOVERY, CALCULATION, AND COMMUNICATION**
- These slides support the **DISCOVERY and COMMUNICATION** of the Business Case for Workplace Analytics. There are 8 unique Business Cases, and they are not mutually exclusive
- **CALCULATION** should be done in an accompanying Excel workbook
- These slides can be used by specialists, sellers, partners, and members of the Workplace Analytics community. They may also be shared with customers
- These slides can best be leveraged in the Transformation workshop, and in proposals for Workplace Analytics licenses and associated consulting services



Caution:

- The business case materials are a starting point, and meant to provide you guidance for framing the DISCOVERY of the business case that will resonate for your customer.

Viva Insights Business Case Calculation: <https://aka.ms/VivaInsightsBusinessCaseCalculation>

READ ME for DISCOVERY content

READ ME for DISCOVERY content

INTERNAL USE ONLY

Use the slides in this section for **DISCOVERY** of the Business Case(s) that best capture(s) the Business Value aligned to the customers' needs and will justify their investment in licenses and optional services.

There are 2 mapping slides that relate the Business Case to the Workplace Analytics Outcomes.

Each Business Case has the following supporting content:

- Discovering the "why"
- An example case study or studies
- A summary of the related Workplace Analytics Outcomes, and related Metrics
- A summary of the Opportunity, what a Future State informed by analysis+action looks like and a description of the resulting Business Value
- You might find all or a subset of these slides useful to meet your needs; they are intended to be modular

Mapping of Business Cases to Workplace Analytics Outcomes

Mapping of Business Cases to Workplace Analytics Outcomes

Business Cases	Workplace Analytics Outcomes
Improve employee autonomy	Boost employee engagement, develop effective managers
Increase capacity for work	Boost employee engagement, develop effective managers, foster innovation, improve agility, enhance operational effectiveness, enhance organizational resiliency, transform meeting culture
Enhance customer engagement	Increase customer focus
Increase customer satisfaction	Increase customer focus
Optimize employee productivity	Accelerate change, boost employee engagement, develop effective managers, enhance organizational resiliency
Improve sales effectiveness	Increase customer focus
Maximize sales efficiency	Increase customer focus
Accelerate speed to market	Foster innovation, improve agility, enhance operational effectiveness

Mapping of Workplace Analytics Outcomes to Business Cases

Mapping of Workplace Analytics Outcomes to Business Cases

Workplace Analytics Outcome	Business Cases
Accelerate Change	Productivity
Boost Employee Engagement	Autonomy, capacity, productivity
Develop Effective Managers	Autonomy, capacity, productivity
Enhance Operational Effectiveness	Capacity, speed to market
Enhance Organizational Resiliency	Capacity, productivity
Foster Innovation	Capacity, speed to market
Improve Agility	Capacity, speed to market
Increase Customer Focus	Customer engagement, customer satisfaction, sales effectiveness, sales efficiency
Transform Meeting Culture	Capacity

Why...improve employee autonomy?

Why...improve employee autonomy?

What is the current state?

- How many levels of approval are required in a typical decision-making process?
- How do managers trust their employees to make decisions independently?
- What is the practice of managers delegating tasks or meetings to their direct reports or teams?

What is the impact of inaction?

- High rates of manager co-attendance at meetings reduces managers' capacity to get work done
- Reduced manager capacity can lead to increased after-hours work and lead to burnout
- Disempowered employees can have higher rates of burnout, disengagement, and can be attrition risks
- Employees are 57% more likely to experience high levels of burnout when they lack job autonomy (<https://www.gallup.com/workplace/237185/employee-burnout-part-organizations-stop-burnout.aspx>)
- Ignoring the role of employee autonomy in agile performance can negatively impact customer engagement (see following case study for agile transformation)

- Changes is more attainable in Workplace Analytics in bigger Organizational

Why...increase capacity for work?

Why...increase capacity for work?

What is the current state?

- What do employees say about the amount of time they spend in meetings? Does this vary by level of leadership in the organization?
- What are the norms around after-hours IM, meeting, and email activity? What are the standards set by leadership and management?
- What are the norms around blocking time for "focus" work or tasks that do not involve collaboration?
- What is the practice of quantifying employee time spent in recurring business processes?

What is the impact of inaction?

- Employees must have capacity in their workday for their tasks and collaboration responsibilities before an organization can drive any improved business outcome – capacity is the first and fastest "win"
- Organizations have an opportunity to reduce the duration of processes by up to 85% with up to a 40% resource reduction (see following case study for a global oil and gas company)
- Organizations can free up 10% of their standard work week with improvements to meeting habits (see following case study for improved ways of working)

Reclaiming thousands of process hours at a global oil & gas company with WpA

Reclaiming thousands of process hours at a global oil & gas company using WpA

Core Business Challenge

A large global energy company wanted to:

- Reduce process time dedicated to rhythm of business activities across operations
- Understand & monitor meeting spillover time impacts, examining meeting prep time

Workplace Analytics Solution

- Analysis revealed each monthly session took more than 170 person hours, spread over 70+ days
- Deeper analysis found root cause: multiple handoffs due to lack of sub-process ownership
- Tracking dashboard gave CFO & cross-functional team ability to monitor go-forward hours impact

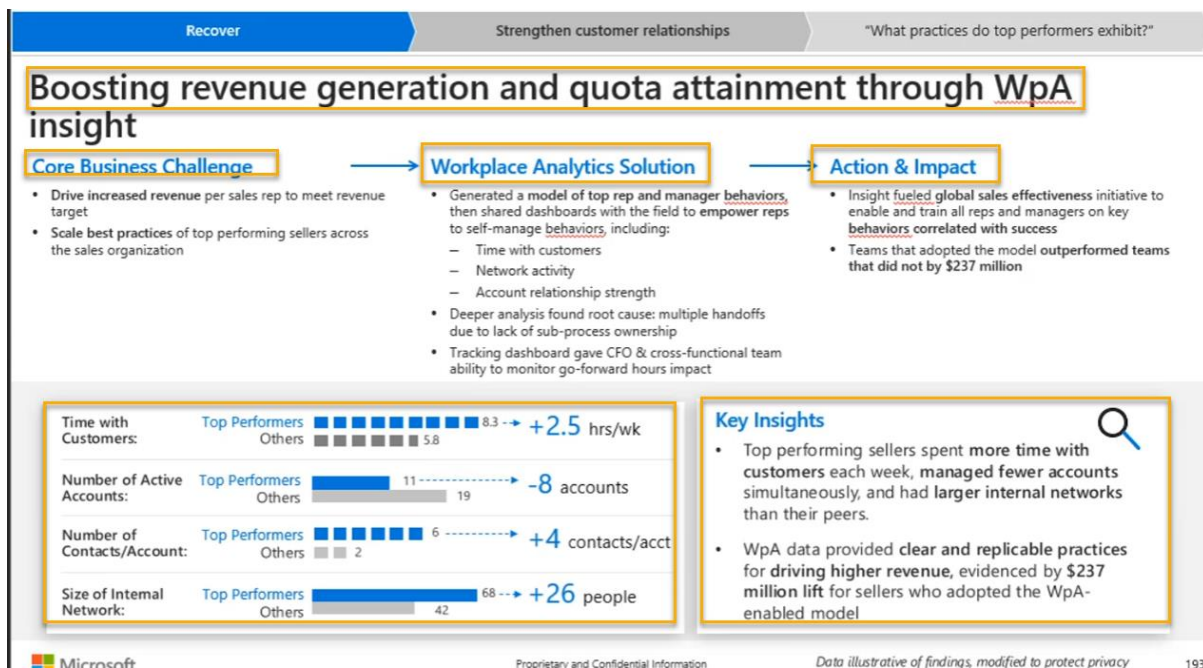
Action & Impact

- CFO and team drove reduction of 40% in prep hours and 85%+ in process days
- Equated to hundreds of thousands of dollars in annual savings
- Sparked broader enterprise-wide scaling of Workplace Analytics to streamline operations



Highlight this business case to customer.

Boosting revenue generation and quota attainment through WpA Insight.



So you want to...increase capacity for work

So you want to...increase capacity for work

Related Outcomes	Opportunity	Future State	Business Value
• Boost Employee Engagement • Develop Effective Managers • Foster Innovation • Improve Agility • Enhance Operational Effectiveness • Enhance Organizational Resiliency • Transform Meeting Culture	Organizations have an opportunity to uncover employee capacity through analysis of collaboration patterns to inform more efficient habits.	Analysis could inform actions to increase employees' time for focused work and learning and development activities by reducing the load of low-quality meetings - those with redundant leadership attendance, multi-tasking, long duration, or large attendance	The business value of the restored capacity may be to reduce new hiring costs by freeing up capacity of existing employees. Existing employees may also produce incremental revenue as a result of time spent in learning and development or innovating product development or business efficiencies or delivering high customer value.
Related Metrics			
• After-hours collaboration • Conflicting meetings • Focus time • Long and large meetings • Multi-tasking meetings • Recurring meetings • Total collaboration			

- **Related Outcomes**
 - Boost Employee Engagement
 - Develop Effective Managers
 - Foster Innovation
 - Improve Agility
 - Enhance Operational Effectiveness
 - Enhance Organizational Resiliency
 - Transform Meeting Culture
- **Related Metrics**
 - After-hours collaboration
 - Conflicting meetings
 - Focus time
 - Long and large meetings
 - Multi-tasking meetings
 - Recurring meetings
 - Total collaboration

READ ME for COMMUNICATION content

READ ME for COMMUNICATION content

The **COMMUNICATION** phase follows the **DISCOVERY** phase and the **CALCULATION** phase

Recall **CALCULATION** is supported by the accompanying Excel workbook

Use the following slides as a template for **COMMUNICATION** of the Business Case(s) that best capture(s) the Business Value aligned to the customers' needs and will justify their investment in licenses and optional services.

Note: the numbers and assumptions are for visual example only and may not reflect your customers' needs and assumptions.

In advancing the Business Case(s) with the customer, you may also choose to share the Excel calculation detail to facilitate further refinement of the assumptions to the customer's business, industry, and/or geography.

Keep in mind that **the primary input needed to draft a Business Case is the number of employees (licenses)**. Other assumptions may be tailored based on specific geographic averages and/or further conversation with the customer

02 Viva Insights Business Case Calculation

Basic Inputs to Populate Business Case Calculators			Mapping Inputs to Business Cases							
Assumption Description	Assumption Value	Assumption Guidance	autonomy	capacity	customer engagement	customer satisfaction	productivity	sales effectiveness	sales efficiency	speed to market
Number of Licensed Employees	10000	size of total licensed population	x	x			x			x
Number of Managers in Licensed Employees	1000	the number of managers within the total licensed population	x							
Number of Sellers in Licensed Employees	1000	the number of sellers within the total licensed population			x	x		x	x	
Average Hourly Wage	\$50	average hourly wage of the employees within the licensed population (may use regional average if not available; used to calculate the value of employees' time)	x	x			x			x
Cost of License per user per month	\$2	Based on pricing for customer according to their Enterprise Agreement and discount structure	x	x	x	x	x	x	x	x
Annual Cost of Consulting Services	\$0	Expected cost of optional consulting services (defaults to \$0K USD for no services, otherwise a range of \$5K up to \$500K+ depending on scope)	x	x	x	x	x	x	x	x
Please note each Business Case Calculator has additional inputs that may be further tailored to the Customer's geography, business, and analytic scope.										

- Capacity is easy to explain to the customers
- Tabs are business cases such as **capacity**, **autonomy**, **customer engagement** etc.
- How you handle ROI?

Insert your Microsoft Services or External Partner content here

Next Steps



Goal

- Align and prioritize on priorities discussed in the meeting
- Close the workshop with clearly defined next steps
 - Commit to sending recommendations and proposal. Provide ETA
 - Clearly define customer asks discussed during the workshop (Examples: socialize next steps internally and lock on scope and timing of next steps)
 - Agree on the timing of the next check-in to move forward



Tip

- Schedule the next check-in before you leave the room

Next Steps

- Align on and prioritize top priorities discussed today
- Discuss immediate next steps
- Schedule next check-in
- ... To be filled out based on the discussion ...

- Customer more questions than any workshop.
- WpA not just nice to have and but must have.
- Some customer not head around.
- Other customer have no clue and no visibility .
- Uncover that they wpA help them.

Knowledge Check

1. What are some **typical applications for Workplace Analytics**? (choose all that apply)

What are some typical applications for Workplace Analytics? (choose all that apply)

- a) Improving organizational agility
- b) Replacing CRM in managing sales and account management
- c) Understanding working patterns and how they vary in time
- d) Augmenting employee sentiment measurements (e.g. surveys) for managing the employee experience
- e) As a clock-in clock-out time recording system

2. What are some analysis approaches you can take using Workplace Analytics data? (choose all that apply)

What are some analysis approaches you can take using Workplace Analytics data? (choose all that apply)

- a) Comparative – data for peer/group comparison
- b) Personal – data for mailbox identification
- c) Literal – data at face value
- d) Contextual – data referenced to business value scenarios
- e) All of the above

3. Which of the following can a customer use to **identify opportunities** to improve work culture?

Which of the following can a customer use to identify opportunities to improve work culture?

- a) Workplace Analytics Pre-Built PowerBI Dashboards
- b) The Workplace Analytics Admin Portal
- c) Their personal fitness tracker

4. Which of the following types of partner services can help customers take action and drive change on Workplace Analytics insights?

Which of the following types of partner services can help customers take action and drive change on Workplace Analytics insights?

- a) Azure IT training courses
- b) Privacy and security audits
- c) Consulting services that develop change management plans

4. What are the **required** and **optional data sources** included in Workplace Analytics?
 - a. **M365** and HR Organizational data
5. where can **leaders go** to view **out-of-the-box insights** on important **business outcomes** in Workplace Analytics?
 - a. Home-page
6. What **type of data** does **Workplace Analytics use** within the **Microsoft 365 collaboration data**?
 - a. **Header-level data**

Check your knowledge

1. What are the required and optional data sources included in Workplace Analytics?

☒ Microsoft 365 and HR organizational data are required; CRM data is optional. ✓

Correct. Microsoft 365 data and HR organizational data are required in Workplace Analytics; CRM data is optional.

☐ Microsoft 365 and CRM data are required; HR organizational data is optional.

☐ HR organizational and CRM data are required; Microsoft 365 data is optional.

2. Where can leaders go to view out-of-the-box insights on important business outcomes in Workplace Analytics?

☐ Query designer

☐ Peer analysis

☒ Home page ✓

Correct. The Home page provides leaders with quick insights into research-based business outcomes.

3. What type of data does Workplace Analytics use within the Microsoft 365 collaboration data?

☐ Email attachments

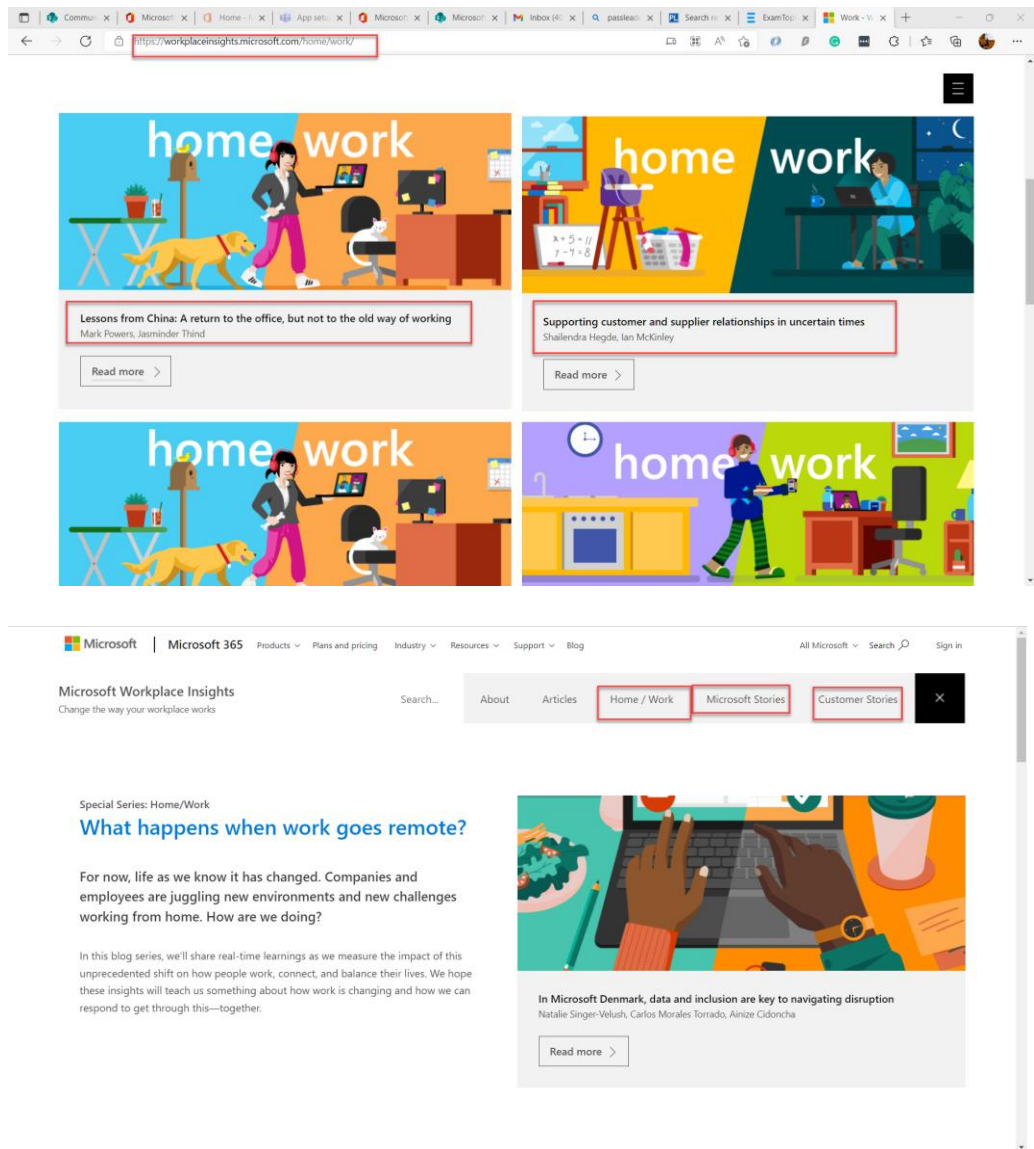
☒ Header-level data ✓

Correct. Workplace Analytics does not look at email body text.

☐ Body of emails

References

2. [New tab \(office.com\)](https://insights.office.com/home/work)
<https://insights.office.com/home/work>



3. [Power BI Intro](#)
4. Workplace Analytics Home page <https://workplaceanalytics.office.com/en-us/Home/>
5. Viva Insights Business Case Calculation: <https://aka.ms/VivaInsightsBusinessCaseCalculation> This Excel workbook provides templates for business case calculation, accompanying the Viva Insights Workshop Toolkit.