Contents

Viva Insights Practitioner Self-Serve Training 2

Module 1: Viva Insights Fundamentals (**2 hours of video** and **30 minutes of exercises**) 2

Components of Viva Insights today ..... **Error! Bookmark not defined.**

What is Workplace Analytics? 7

Intro to the Workplace Analytics tool 12

Data sources 23

Meeting exclusions 25

Overview for admins 29

Assigning licenses 31

Privacy options 35

Working with organizational data 37

Watch the Structuring organizational data video (5 min) 42

- Structuring organizational data 42

Working with queries 54

4. Privacy and Security 64

Workplace Analytics 64

Earing trust is a shared responsibility 65

Product Control 67

Matrix 67

Security 68

Module 2: Ways of Working Assessment 90 minutes of video, and 30 minutes of exercises) 69

Complete Ways of working assessment module (Microsoft Learn) 69

Ways of Working and Services Overview 84

Introduction and Delivery Approach video 85

Power BI Walkthrough video 87

Emerging Stories video 91

Complete the Ways of Working assessment exercise (Microsoft Learn) 101

Discover Workplace Analytics with Microsoft Viva Insights 101

See how it works 104

Explore Viva Insights with Workplace Analytics 109

Create custom analysis with Workplace Analytics for Viva Insights 115

Module 3: Viva Insights Analysis **(2 videos, 2 exercises)** 139

References 157

Viva Insights Practitioner Self-Serve Training

Module 1: Viva Insights Fundamentals (2 hours of video and 30 minutes of exercises)

1. Watch the Customer story video (3 min)

   AB InBev harnesses data to help simplify process and empower employees

   As a leading global brewer, AB InBev aspires to support a culture of community among its 180,000 employees and the satisfaction of customers around the world, in tandem with its successful growth. Watch the video below to learn how AB Inbev used Workplace Analytics and MyAnalytics, part of Office 365, to improve employee experience, simplify processes, and create workplace efficiencies.

   Work Analytics

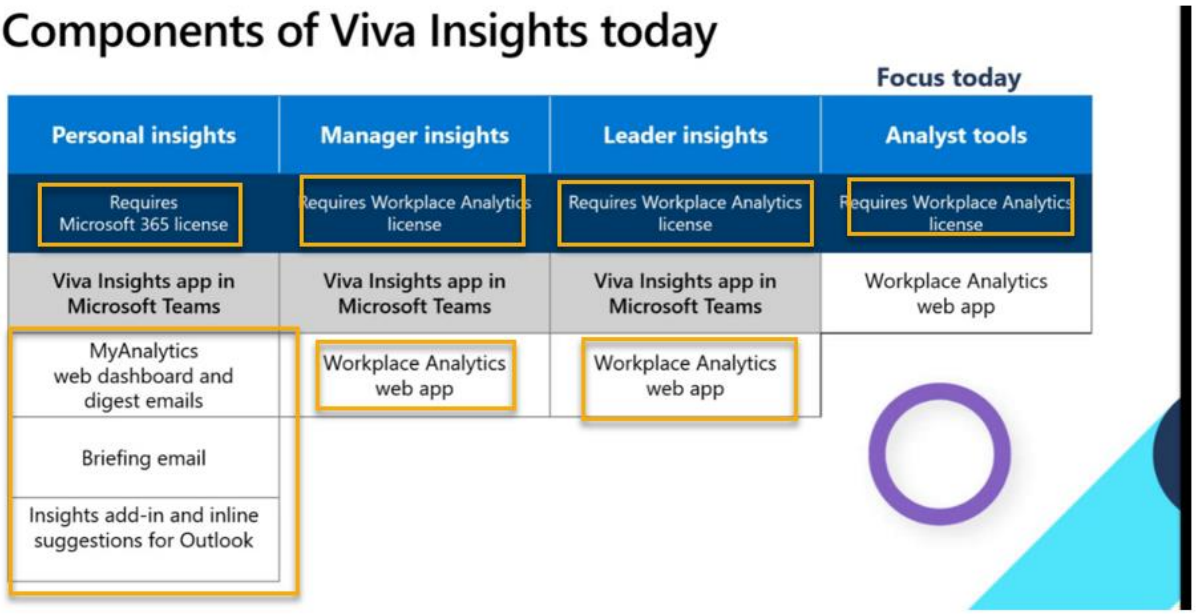
2. Watch the Introduction to Viva Insights (10 min)

   Module 1: Viva Insights Fundamentals
   Components of Viva Insights

   Module 1: Viva Insights Fundamentals

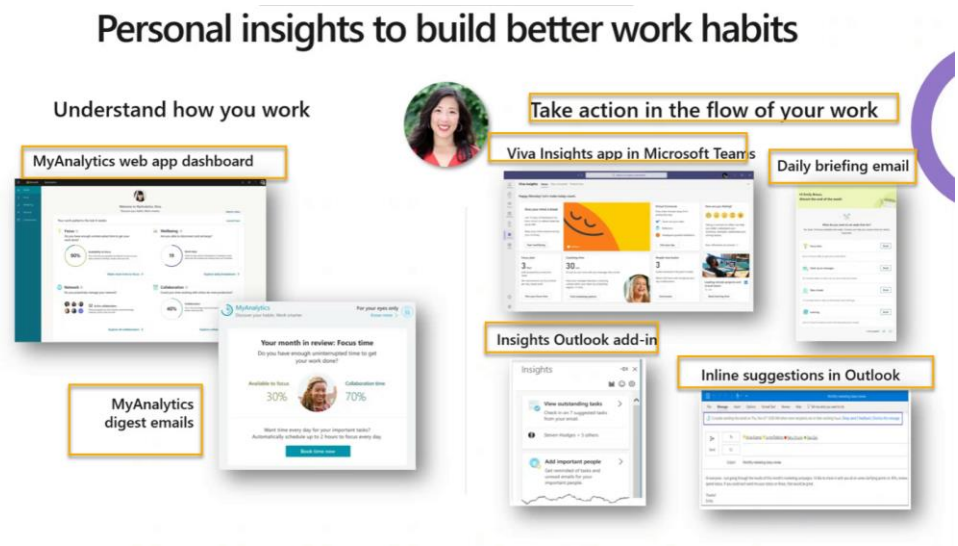
Components of Viva Insights

Components of Viva Insights today

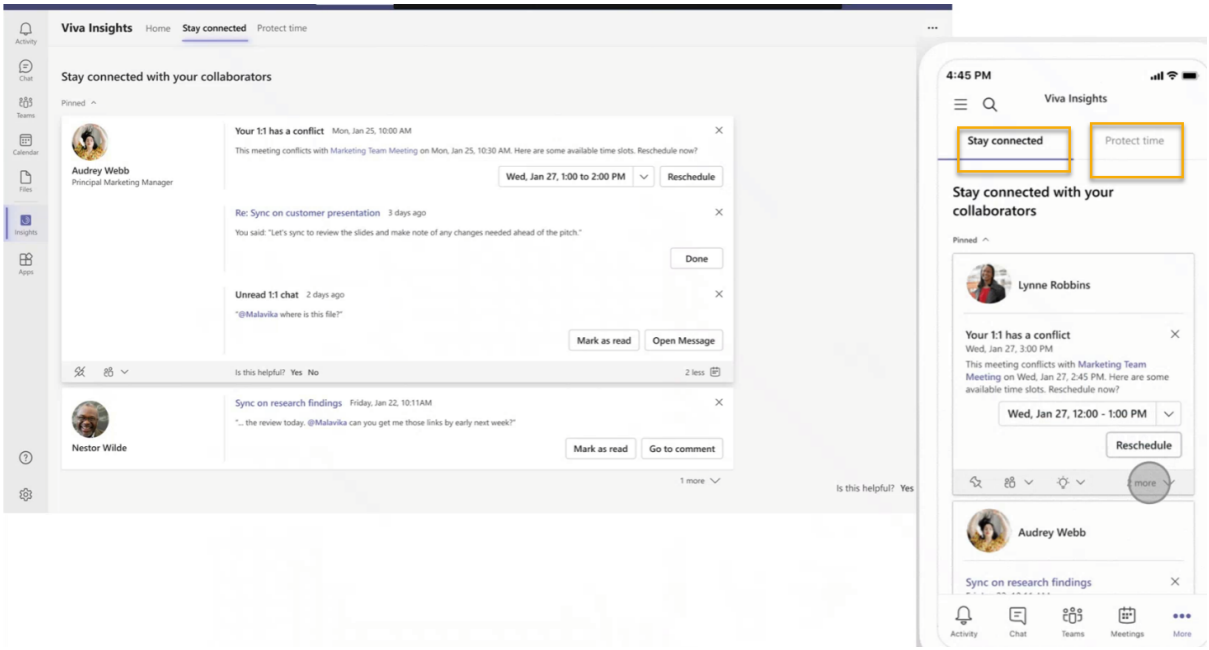


a) Personals Insights

- Only Individual data
- Work patterns and habits
- No Personal Identifier information is shared.

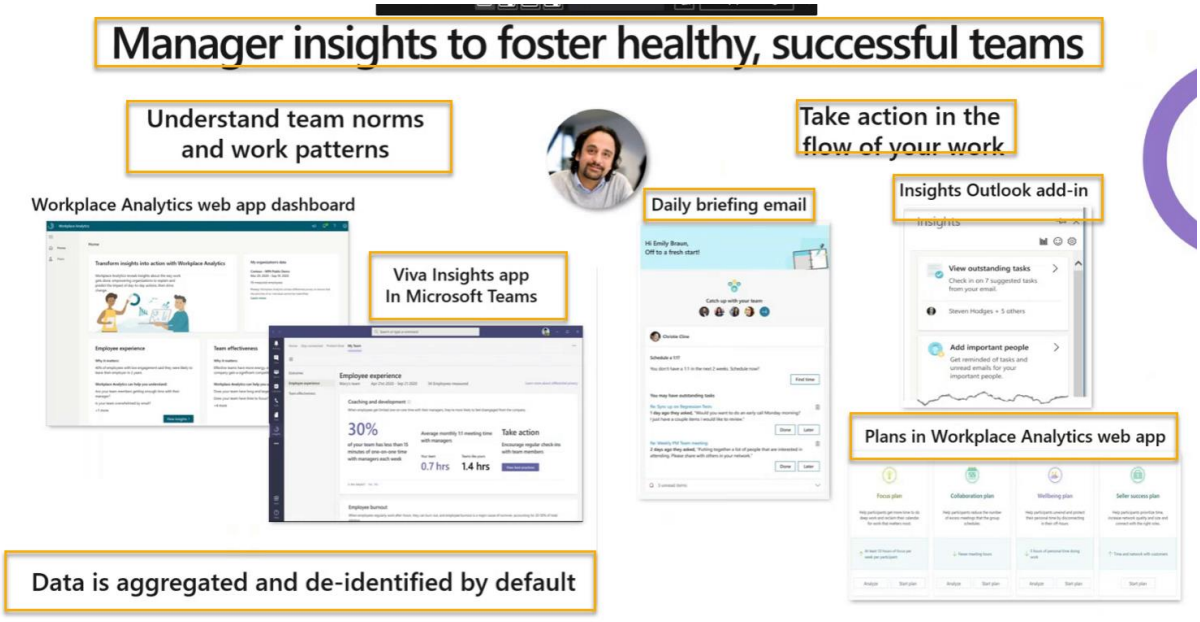


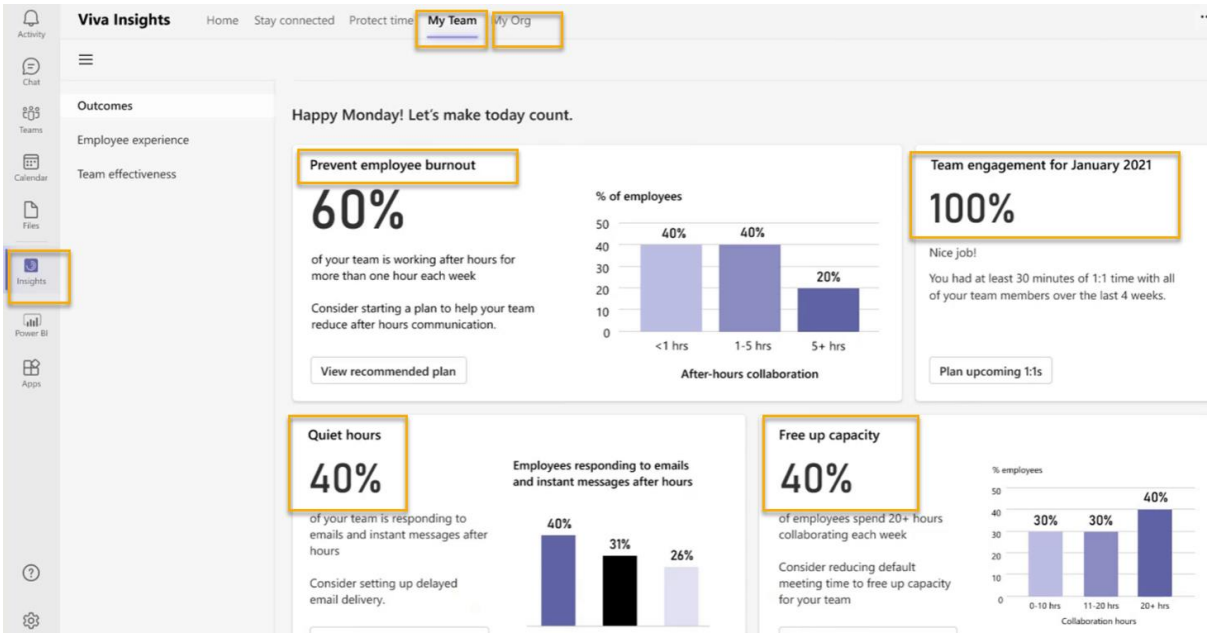
Teams App

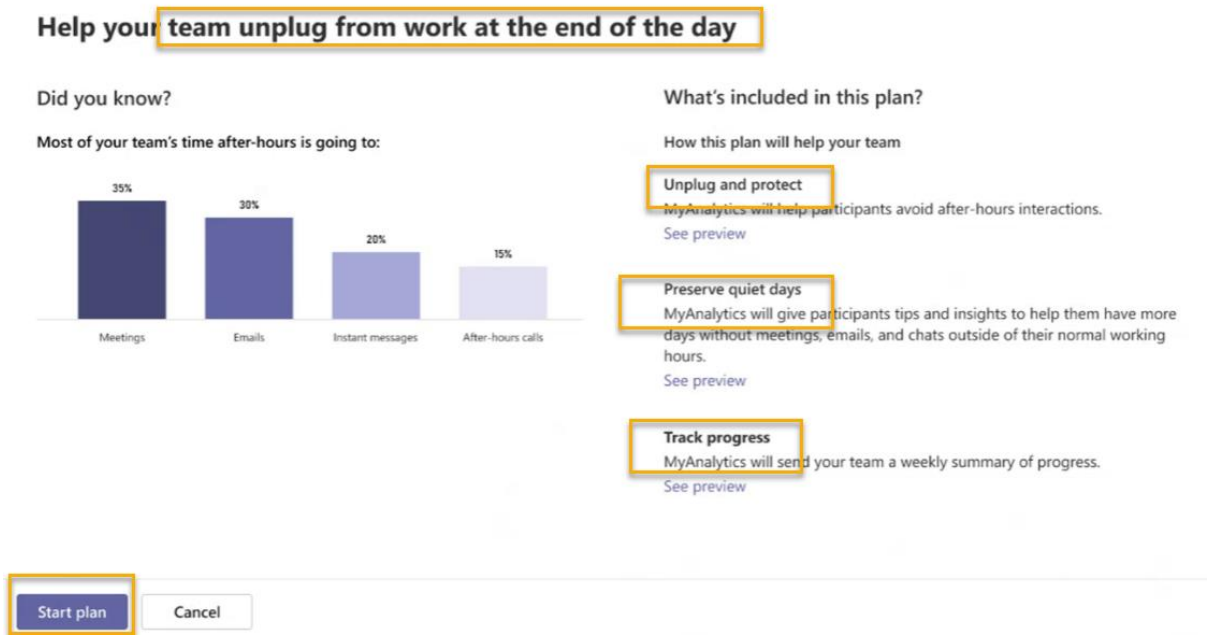


b) Managers Insights

- Meeting overload
- Burn out

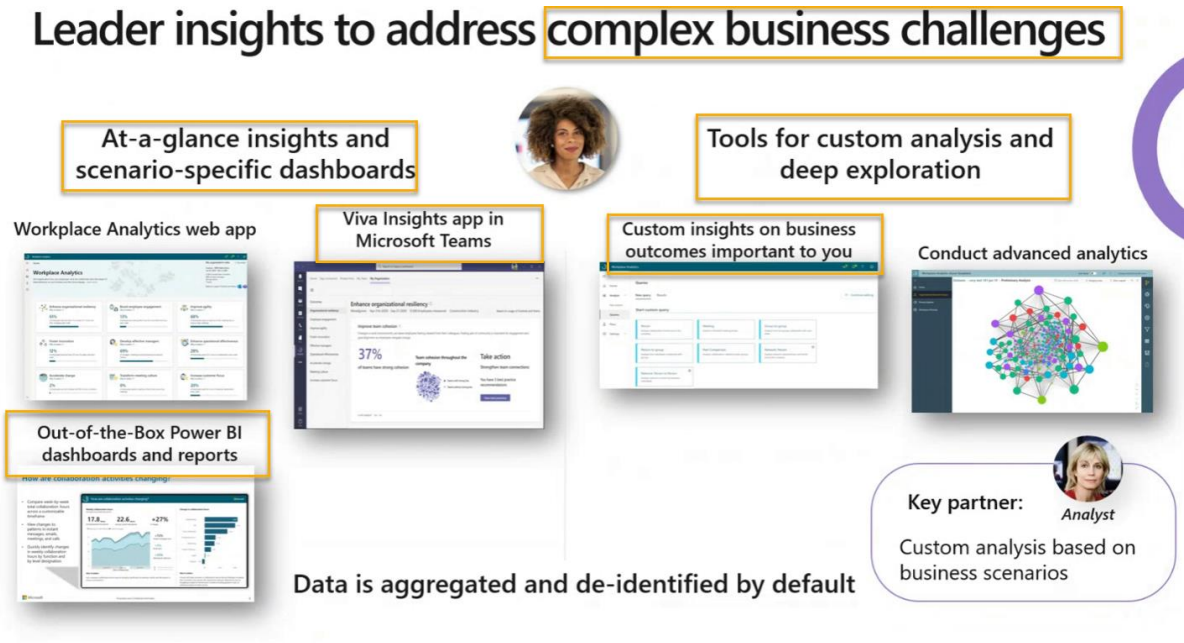




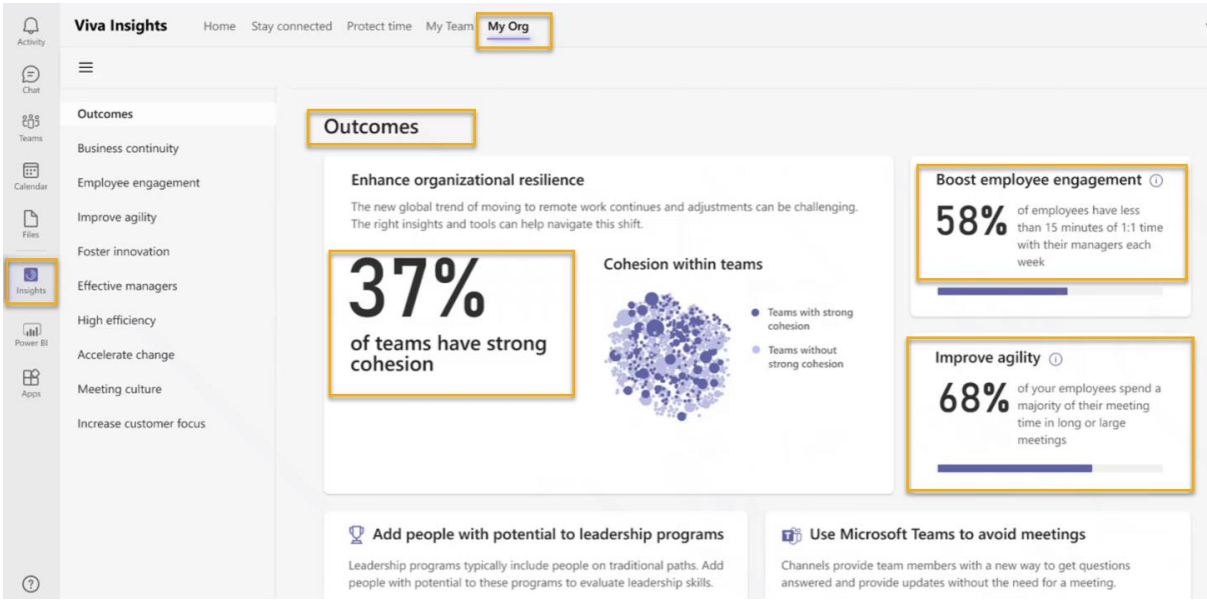


c) Leaders Insights

- Data is aggregated and de-identified

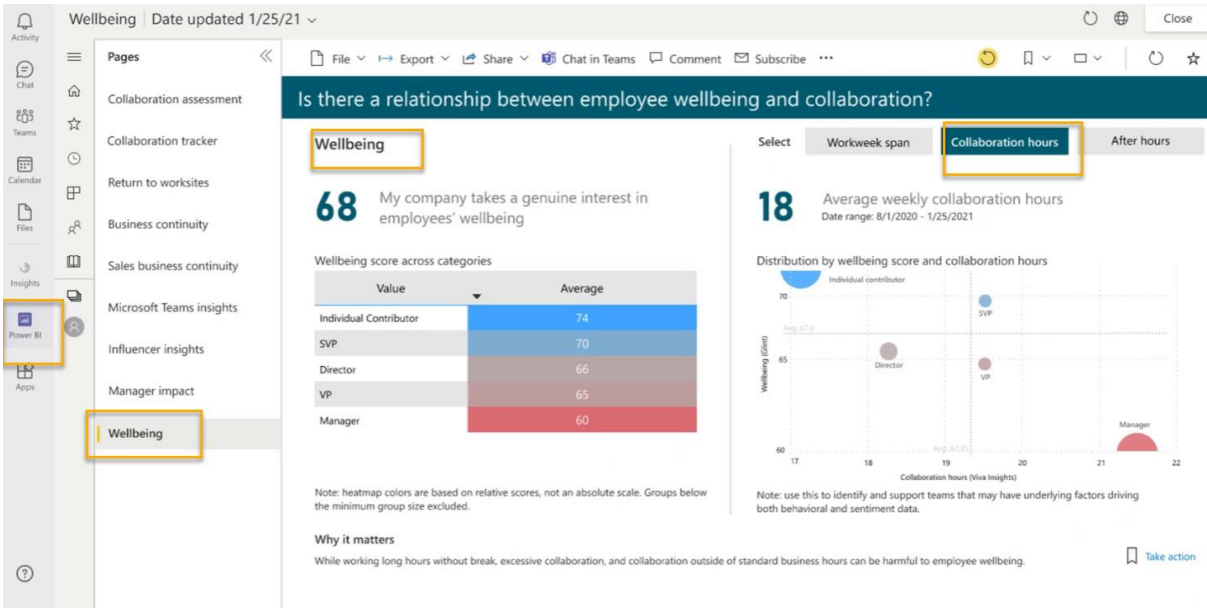


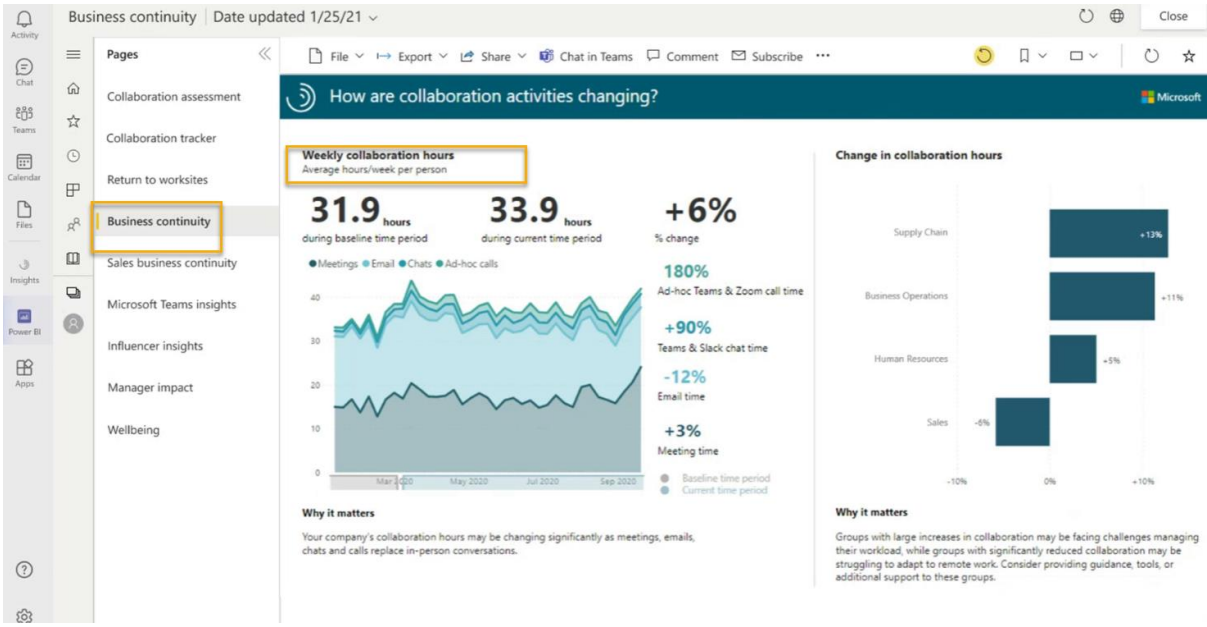
Test



Well Being

-
- Power BI





What is Workplace Analytics?

- Watch the Introduction to Workplace Analytics video (6 min)

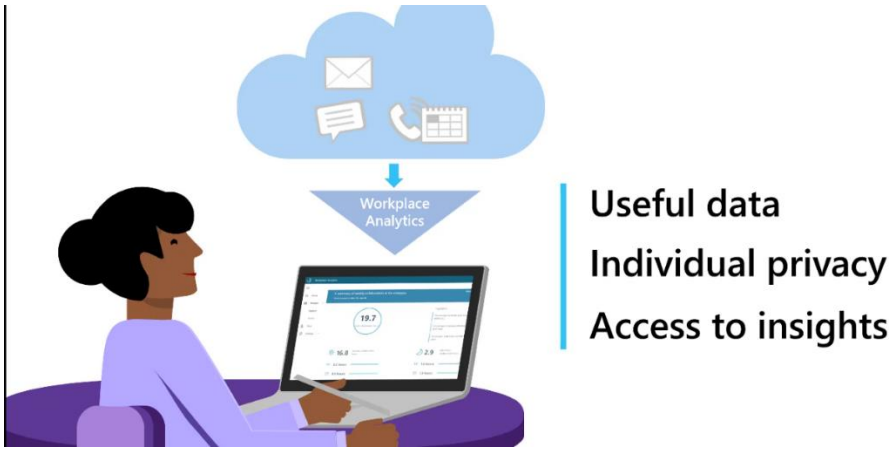
- For Stakeholder

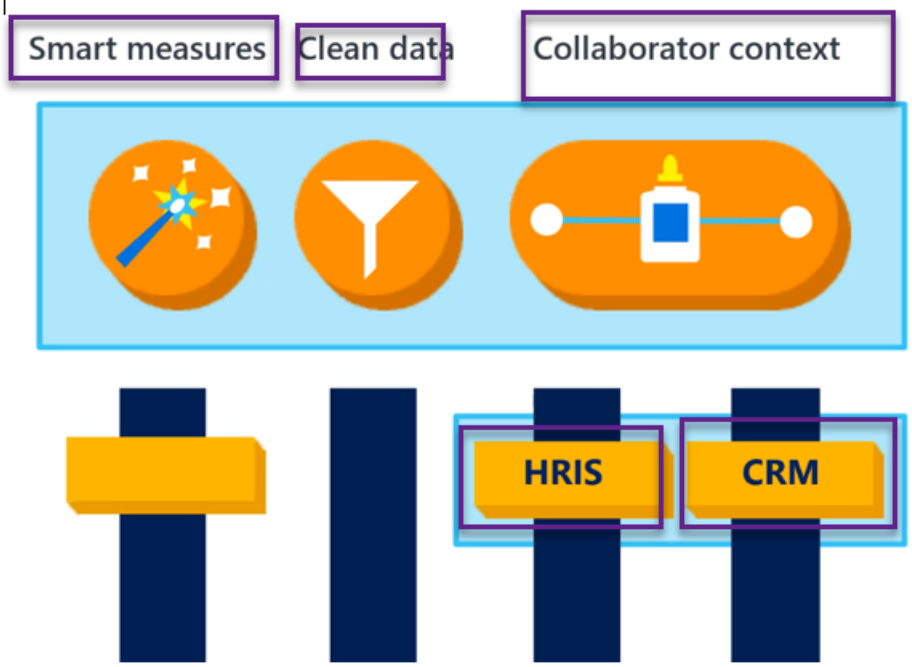
    1. Exchange

2. How organization works cohesively

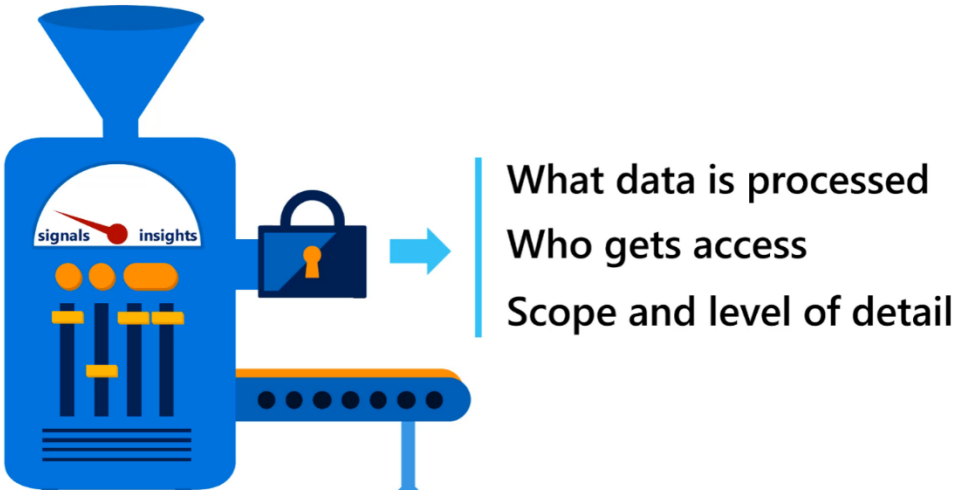


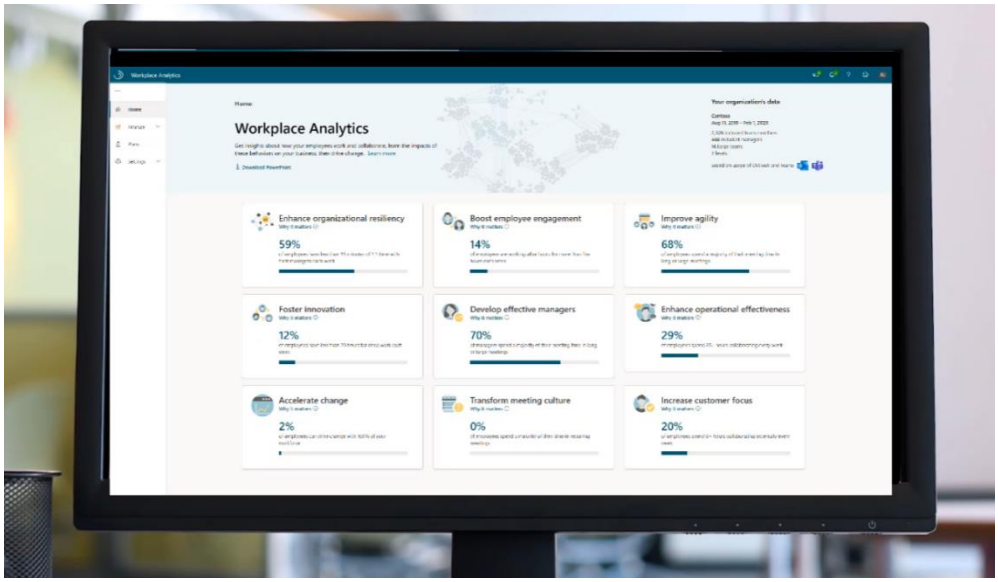
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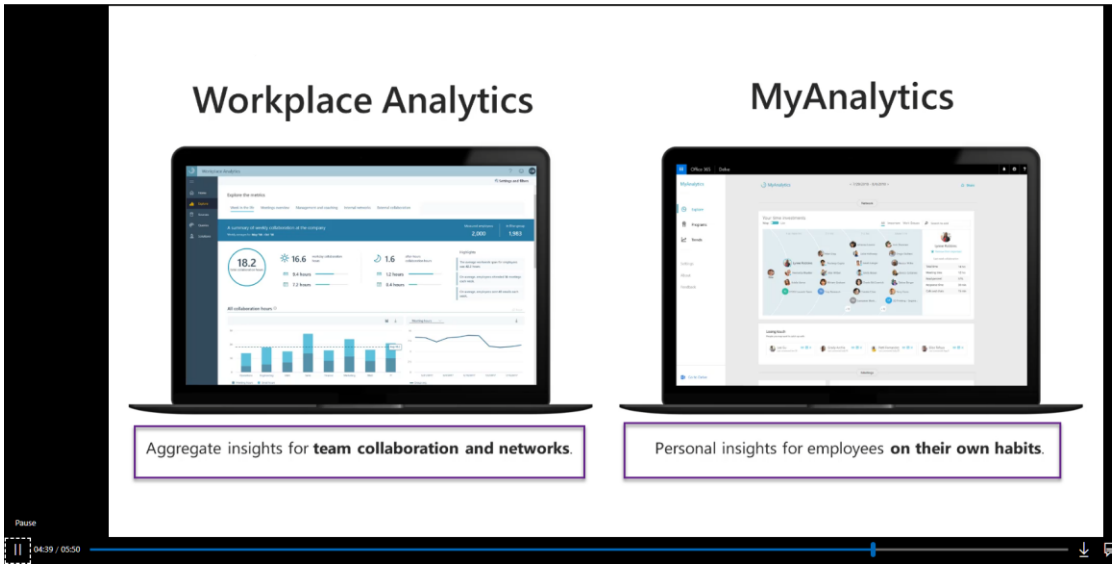


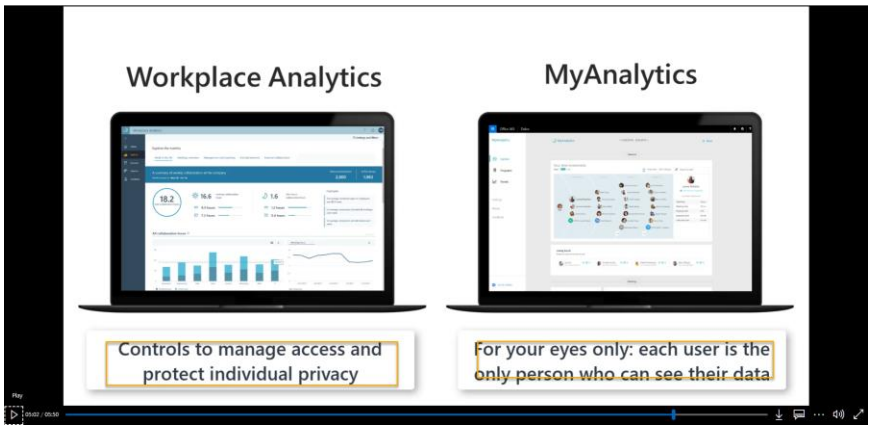

Smart measures
Clean data
Collaborator context
HRIS
CRM

3. s


signals
insights
What data is processed
Who gets access
Scope and level of detail







4. Check Stakeholder if they are familiar about MyAnalytics and Workplace Analytics

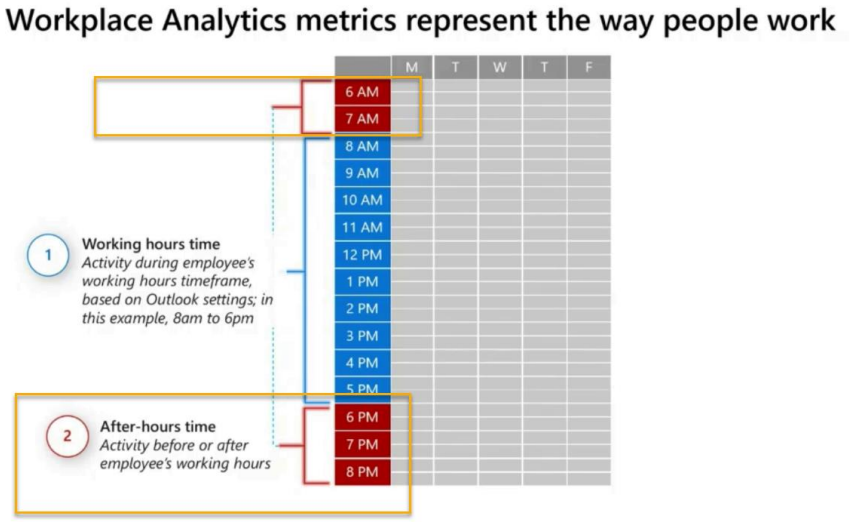
    1. Explain the difference

2. How they complement each other.

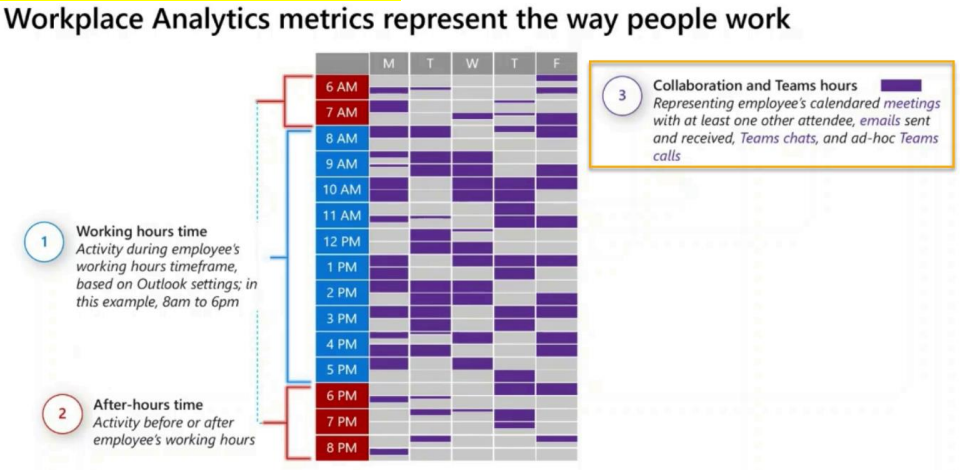
- Watch the [Introduction to Workplace Analytics metrics video](#) (9 min) [1]

Calendar of an employee (Outlook)

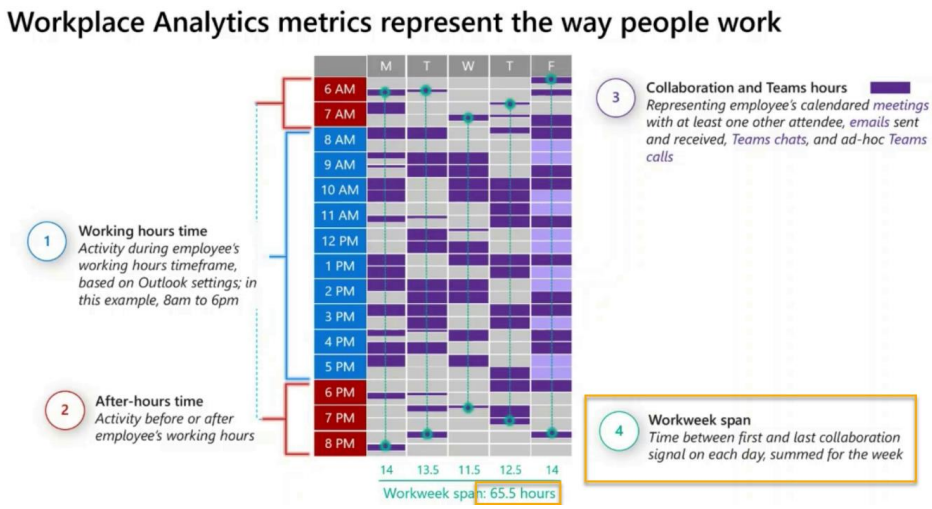
Working Hours, After Hours,



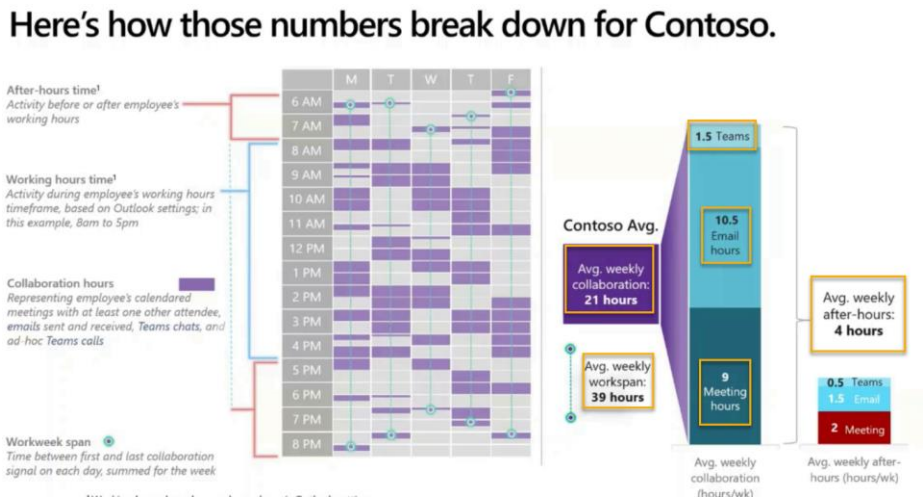
Collaboration and Teams hours



Workweek span (Metric)



Contoso Avg.



Week in a life.

- Does not measure phone number, face to face. S
- High email hours means Teams Adoption
- Meeting Effectiveness, may be they are using long hours.

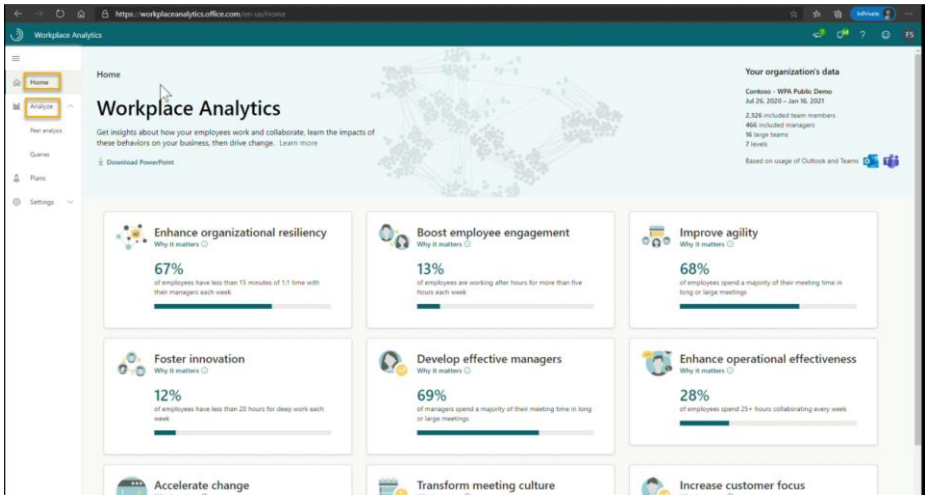
- If organization has not set Outlook setting properly, then numbers will be skewed.

Intro to the Workplace Analytics tool

- Watch the Introduction to the Workplace Analytics tool video (21 min)

Workplaceanalytics.office.com

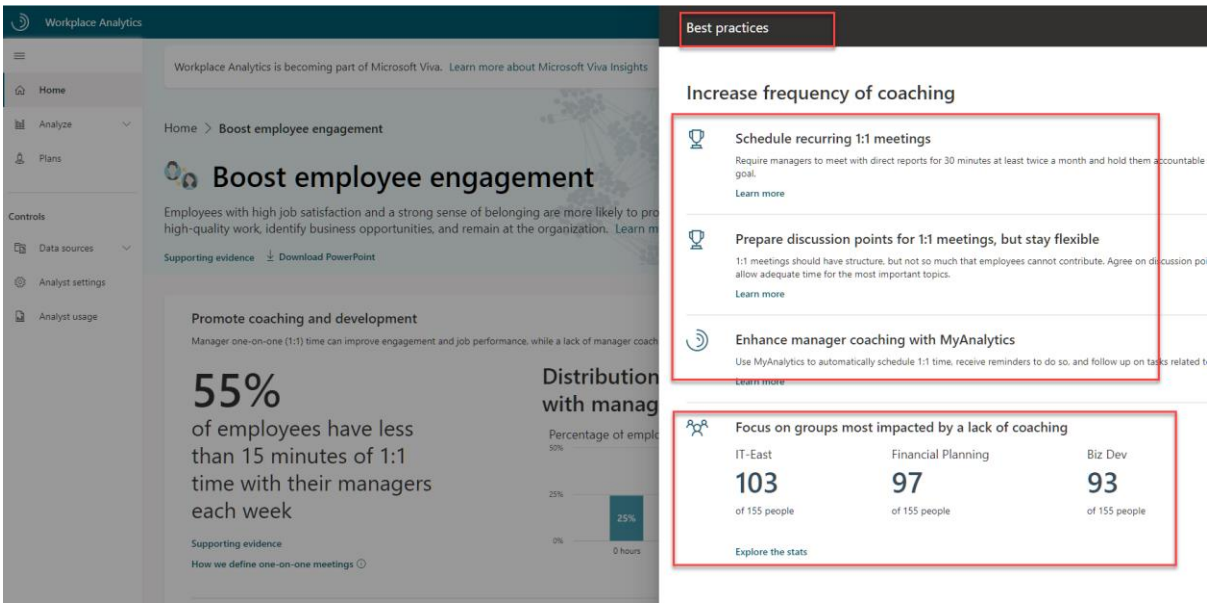
Home has 9 cards ..



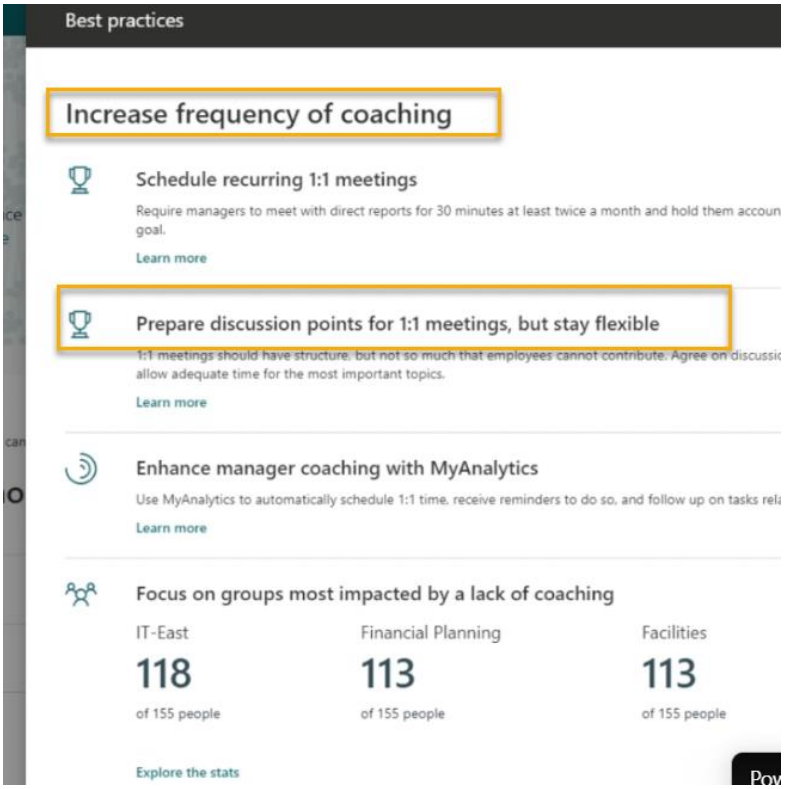
Boost employee engagement

- Boost employee engagement

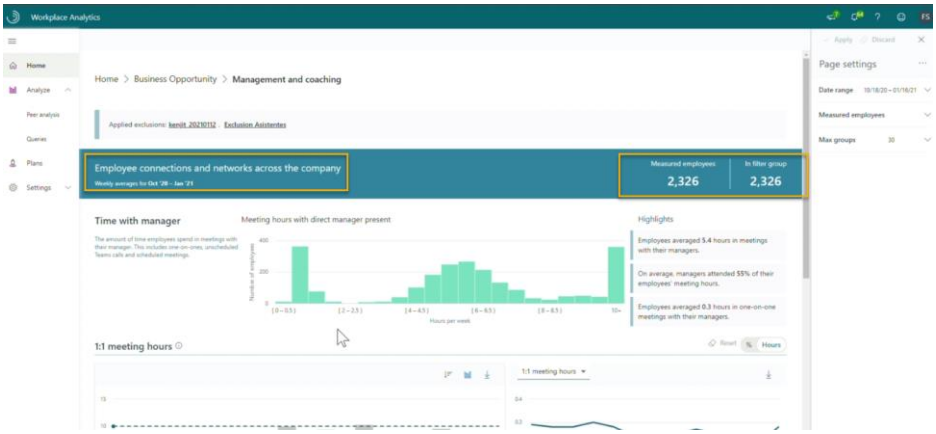




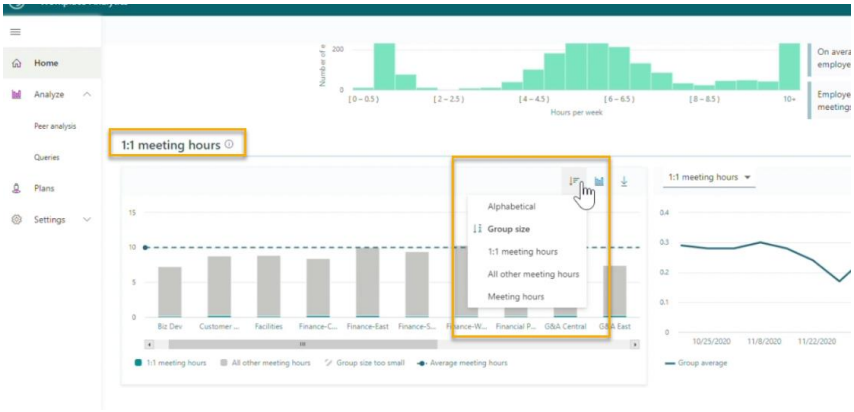
- Find my Insights



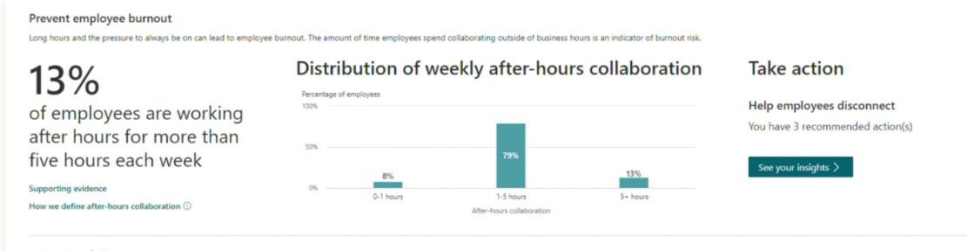
- Explore



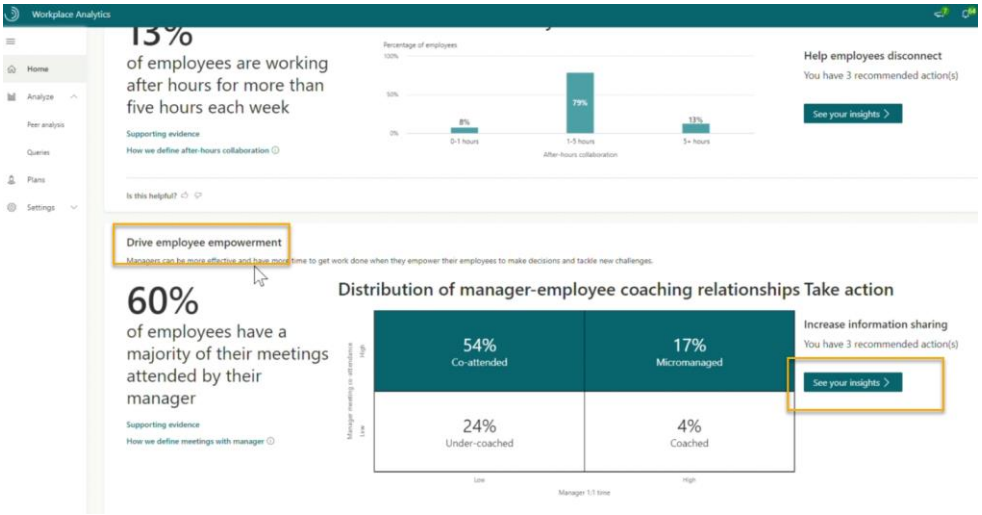
- 1-1 , download data



- Prevent employee burnout



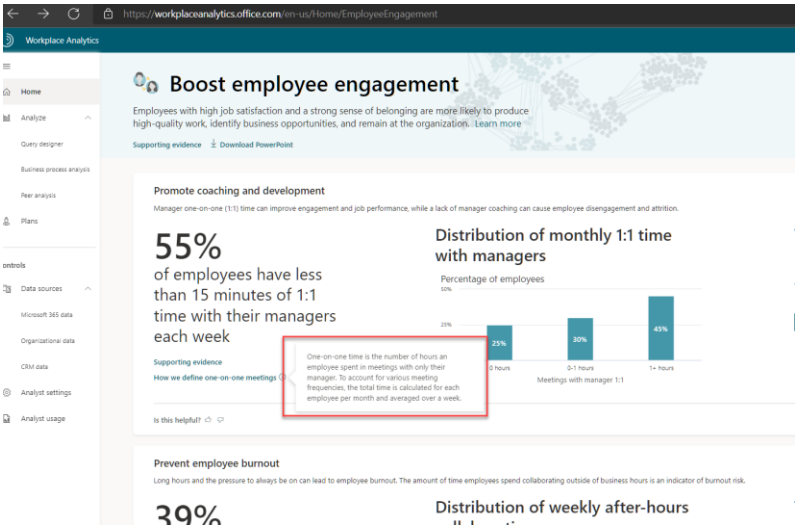
- Drive Emp Empowerment



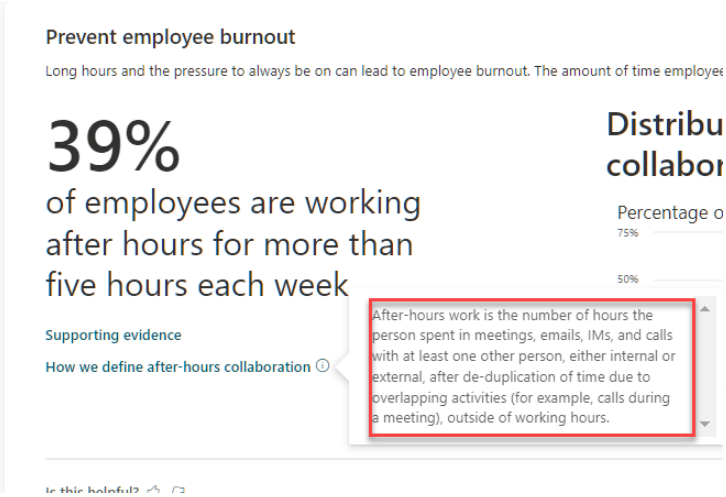
- Enhance organizational resiliency

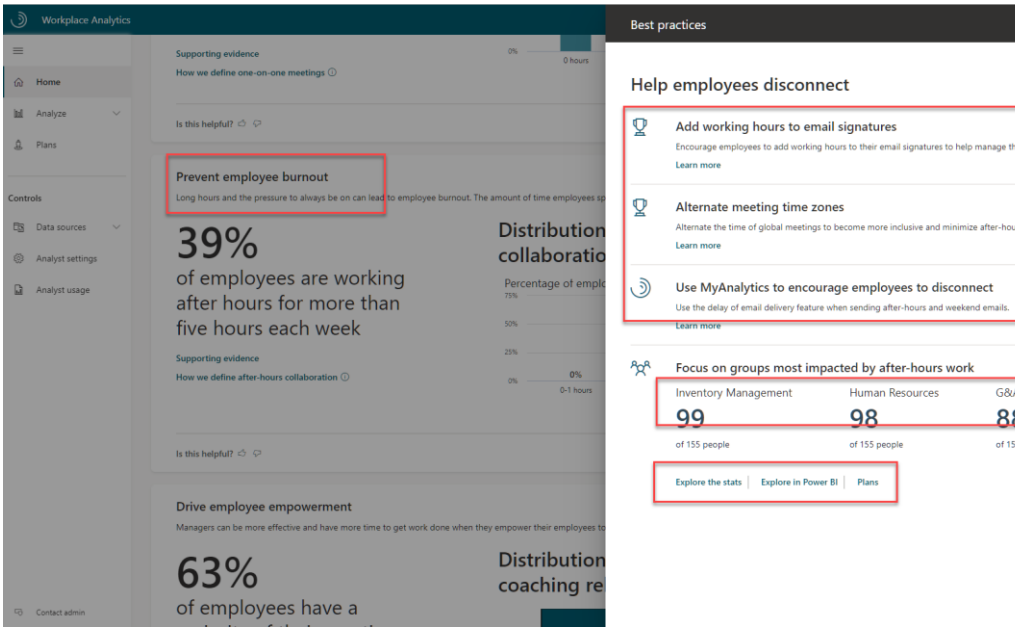
- **Promote coaching and development**

1. **Manager one-on-one (1:1)** time can
    1. **improve engagement** and **job performance**,
    2. while **a lack of manager coaching** can cause **employee disengagement** and **attrition**.

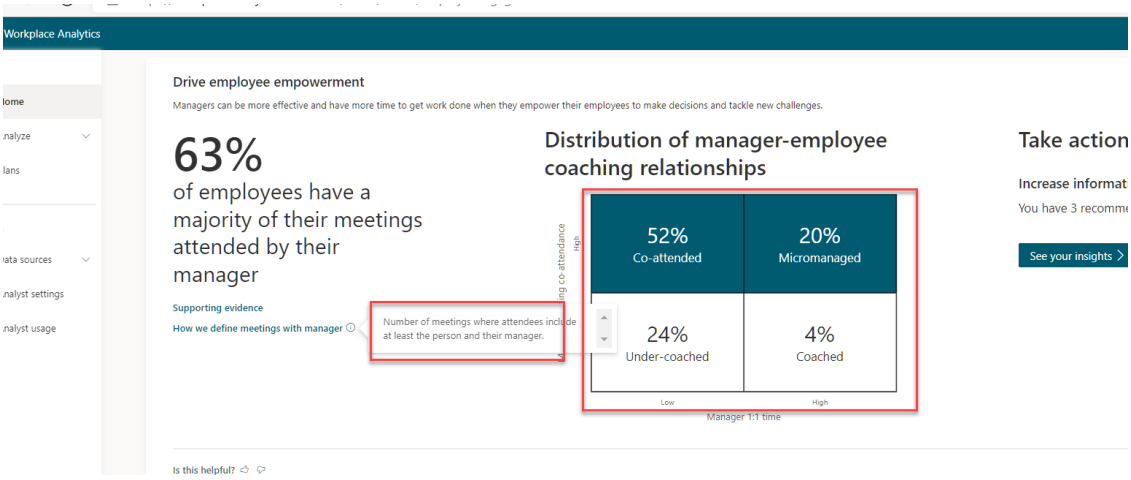


- **Prevent employee burnout**

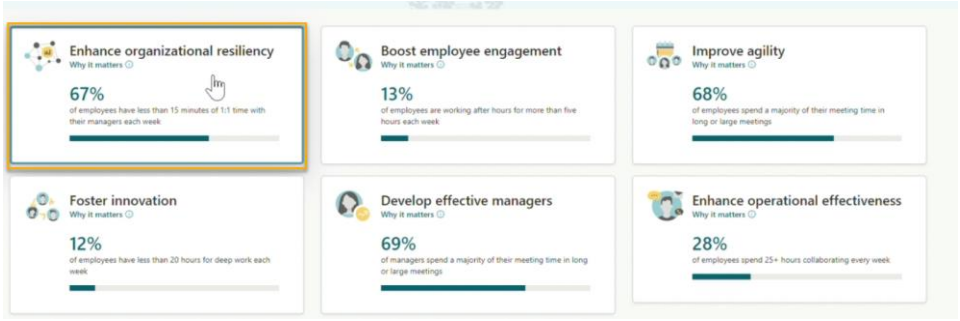


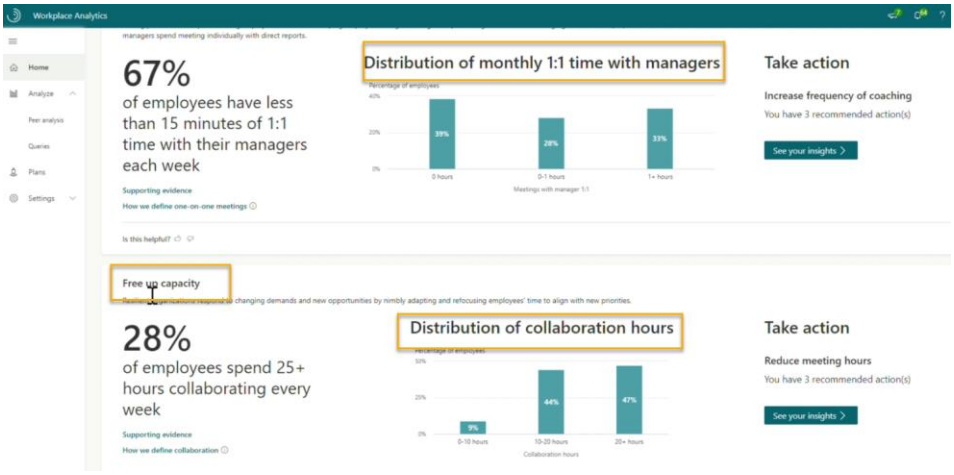


- **Drive employee empowerment**

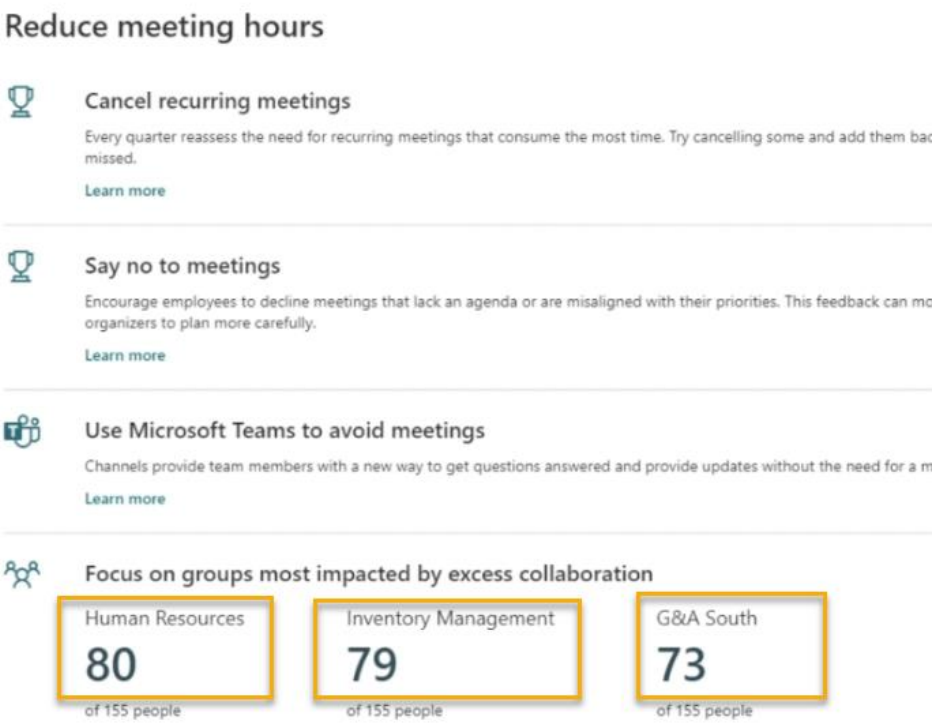


- **Improve team cohesion**

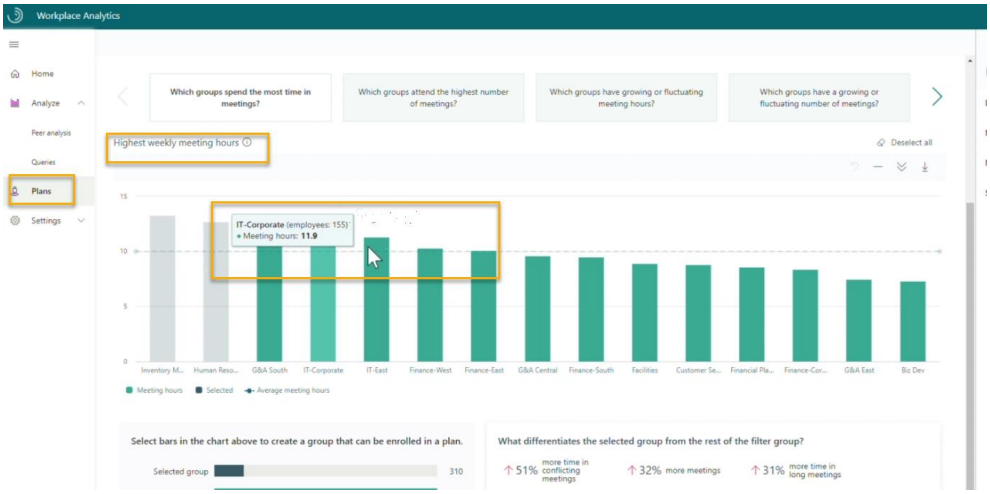




- Focus groups



- Explore the stats



- 4 Plans

1. Focus plan

Help participants get more time to **do deep work** and reclaim their calendar for **work that matters most.** **Increase ^**

2. Collaboration plan

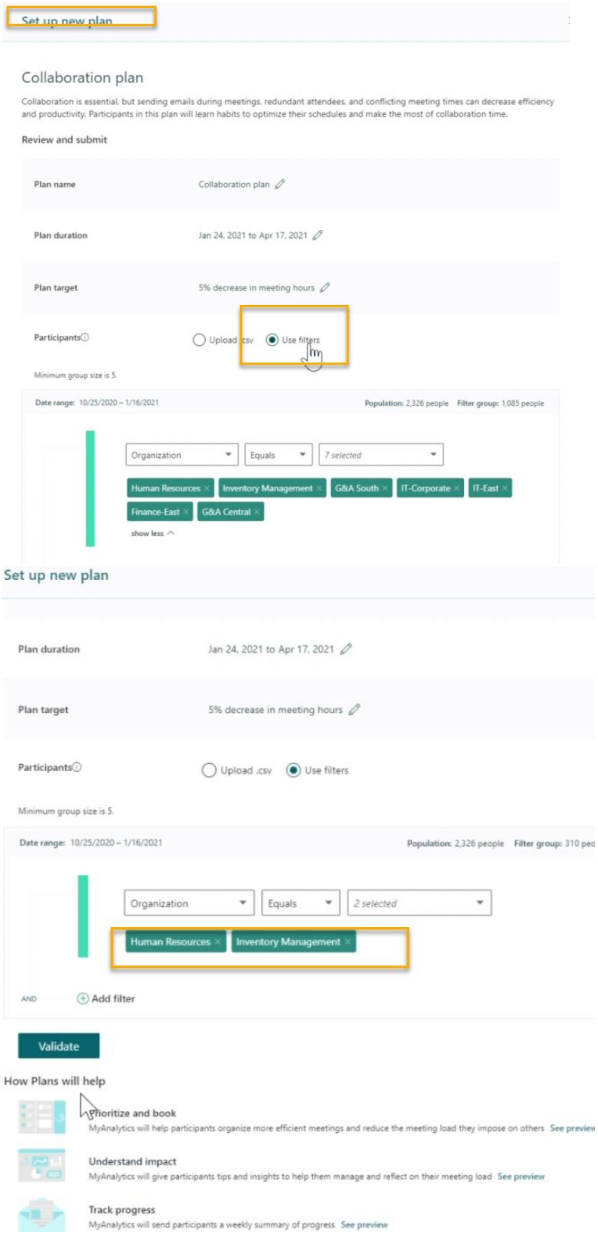
Help participants **reduce the number of excess meetings** that the group schedules.
Decrease V

3. Wellbeing plan

Help **participants unwind** and protect their **personal time** by **disconnecting in their off-hours.**
Decrease V

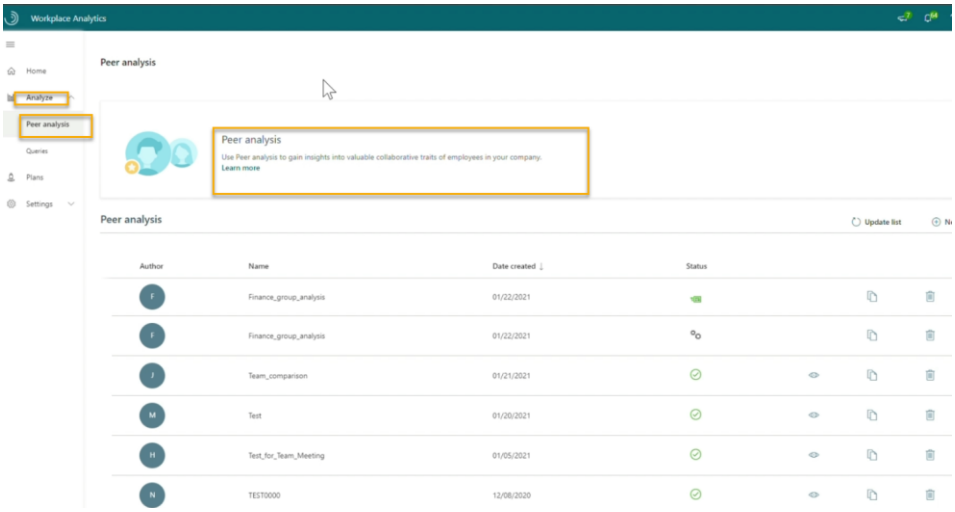
4. Seller success plan

Help participants prioritize time, **increase** network quality and size and connect with the right roles.
Increase ^

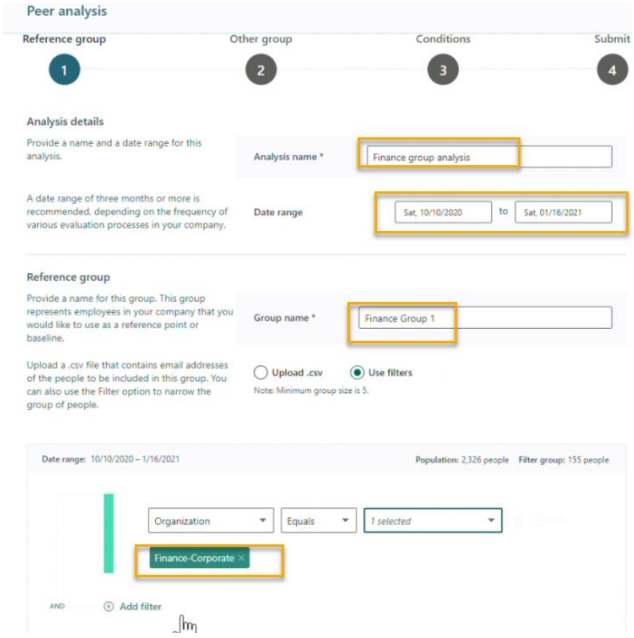

Set up new plan
Collaboration plan
Collaboration is essential, but sending emails during meetings, redundant attendees, and conflicting meeting times can decrease efficiency and productivity. Participants in this plan will learn habits to optimize their schedules and make the most of collaboration time.
Review and submit
Plan name
Collaboration plan
Plan duration
Jan 24, 2021 to Apr 17, 2021
Plan target
5% decrease in meeting hours
Participants
Upload .csv
Use filters
Minimum group size is 5.
Date range: 10/25/2020 – 1/16/2021
Population: 2,326 people
Filter group: 1,085 people
Organization
Equals
7 selected
Human Resources
Inventory Management
G&A South
IT-Corporate
IT-East
Finance-East
G&A Central
show less

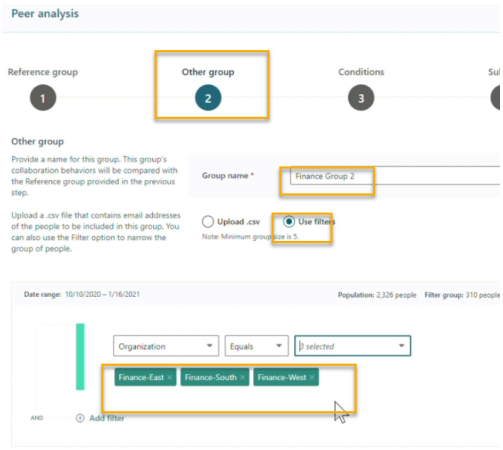
Set up new plan
Plan duration
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Plan target
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Participants
Upload .csv
Use filters
Minimum group size is 5.
Date range: 10/25/2020 – 1/16/2021
Population: 2,326 people
Filter group: 310 pe
Organization
Equals
2 selected
Human Resources
Inventory Management
AND
Add filter
Validate
How Plans will help
Prioritize and book
MyAnalytics will help participants organize more efficient meetings and reduce the meeting load they impose on others See preview
Understand impact
MyAnalytics will give participants tips and insights to help them manage and reflect on their meeting load See preview
Track progress
MyAnalytics will send participants a weekly summary of progress See preview

- Analyze



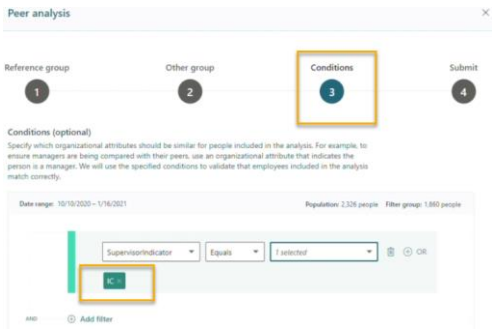
- Use Peer analysis to gain insights into valuable **collaborative traits** of employees in your company.



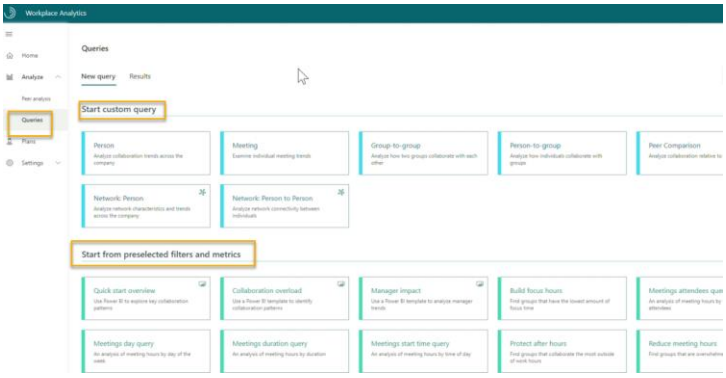
- 

  Other Groups

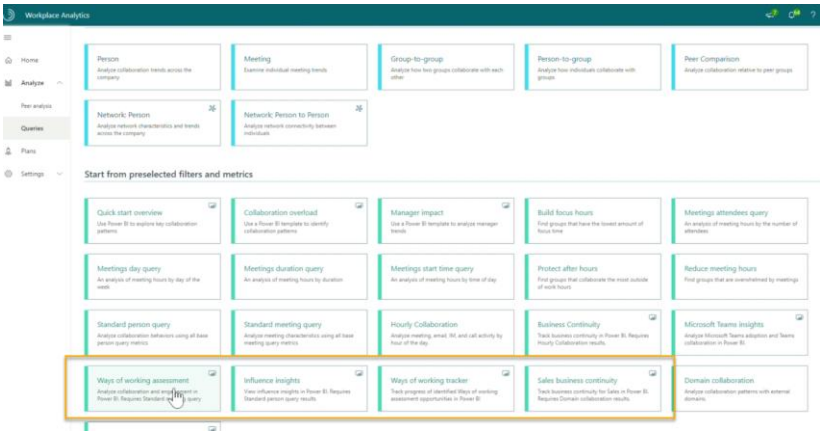
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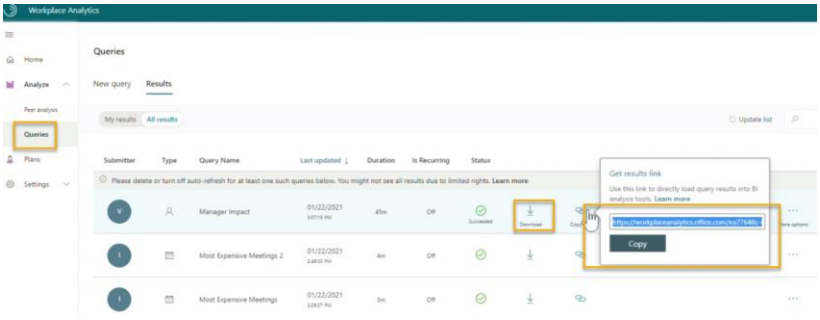


- Queries



- Power BI

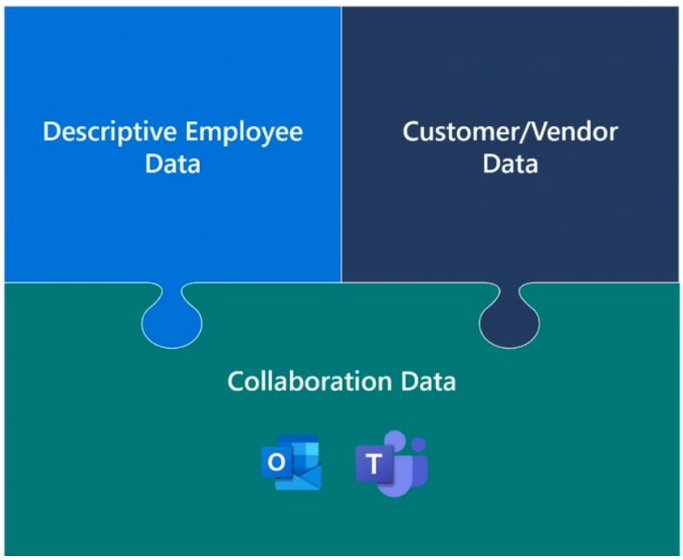


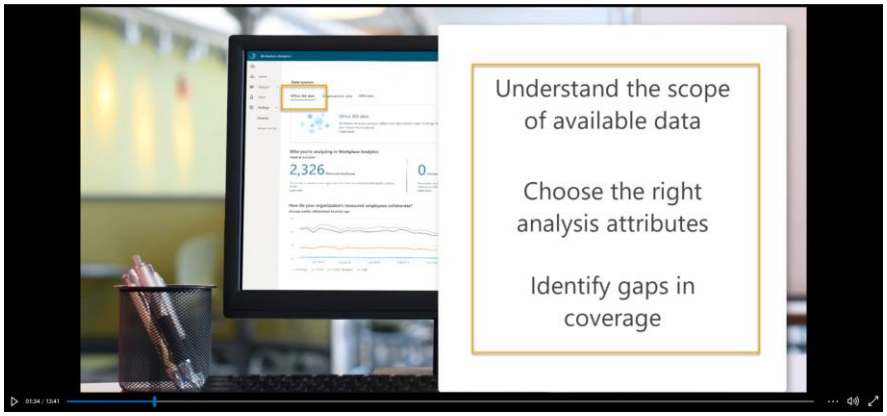


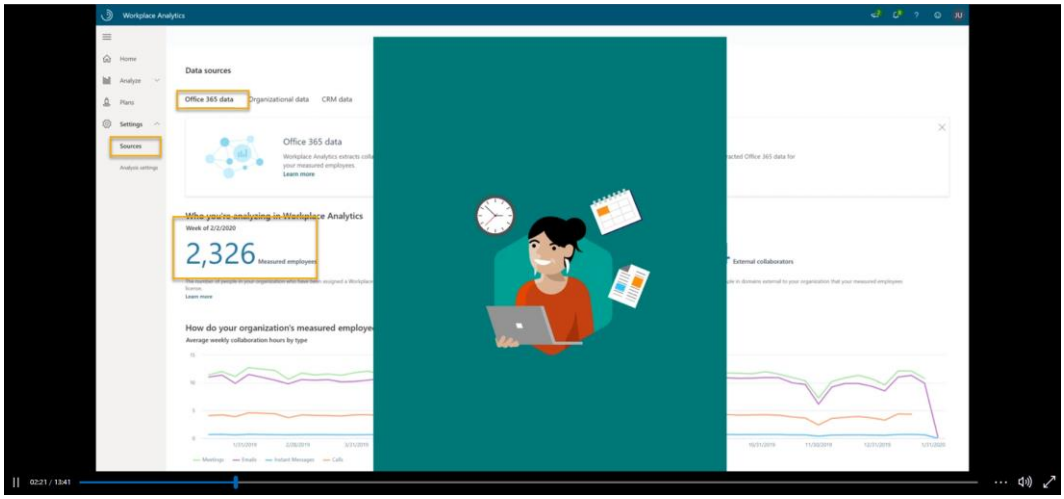
3. Before you begin

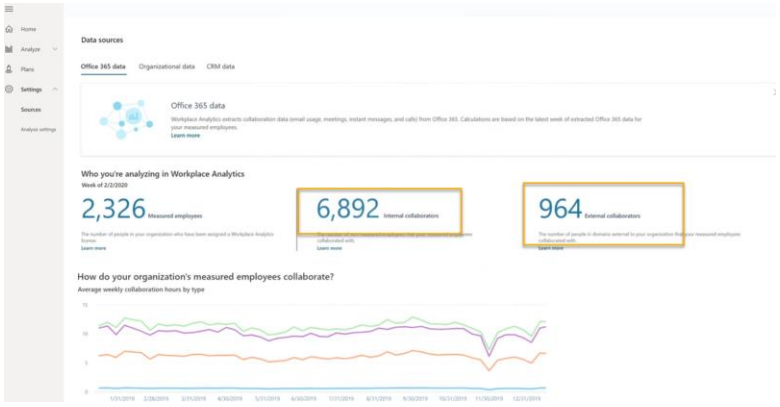
Data sources

- Watch the Data sources video (14 min)

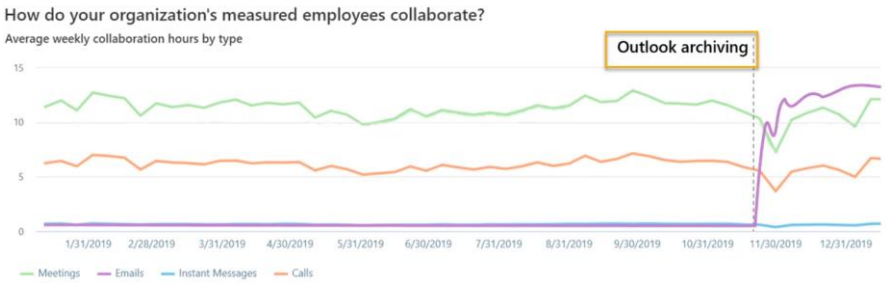
1. 

2. 

3. 

4. 

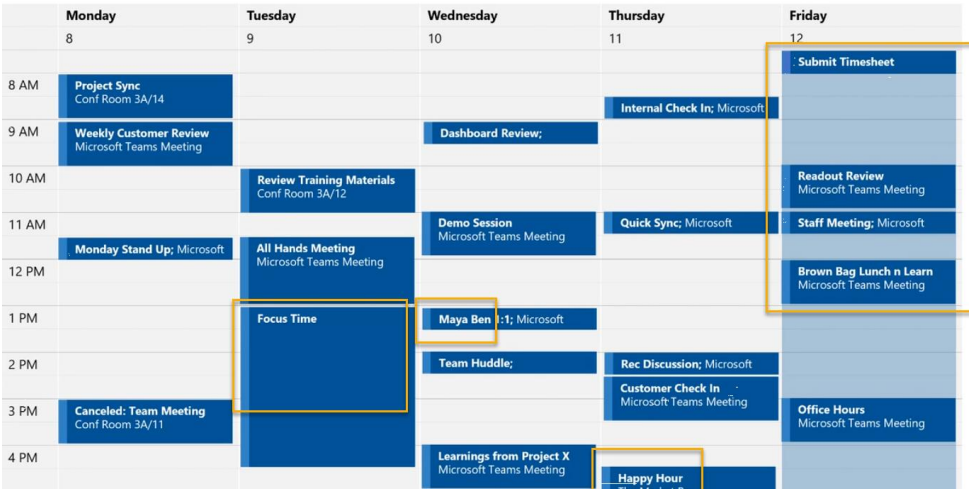
5. Last **13 months** and then **weekly**

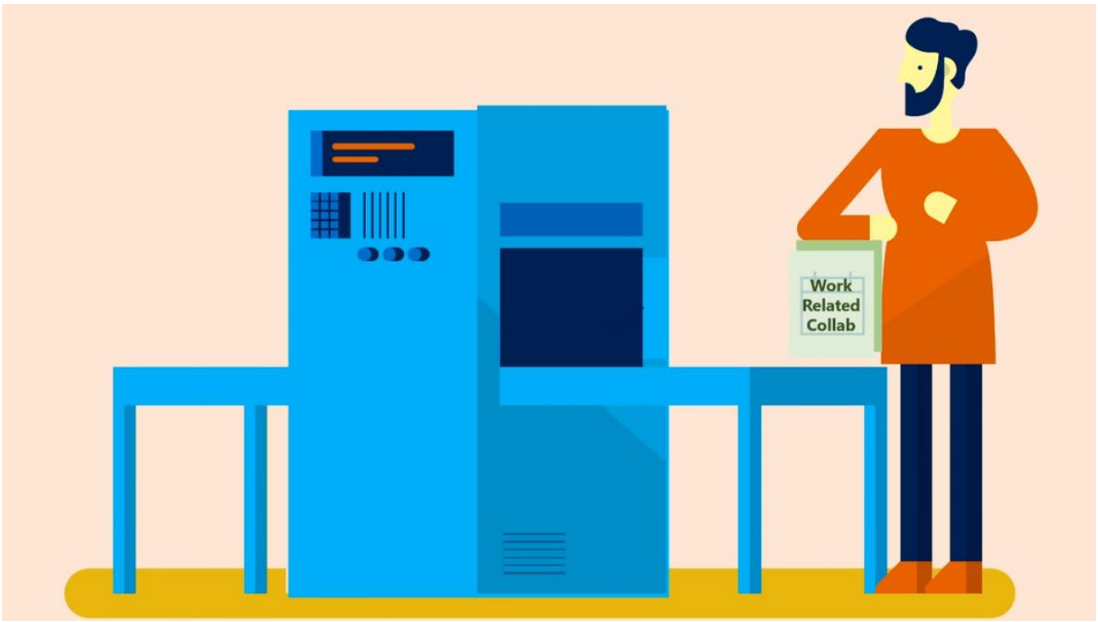
6. 

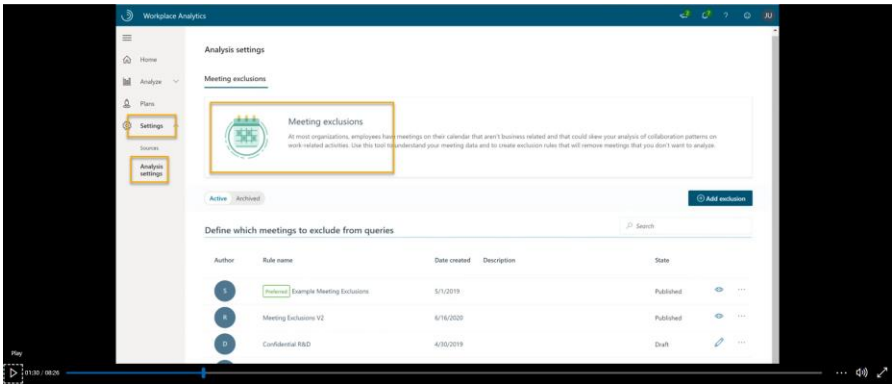
Meeting exclusions

- Watch the Meeting exclusions video (8 min)

Exclude happy hour etc.

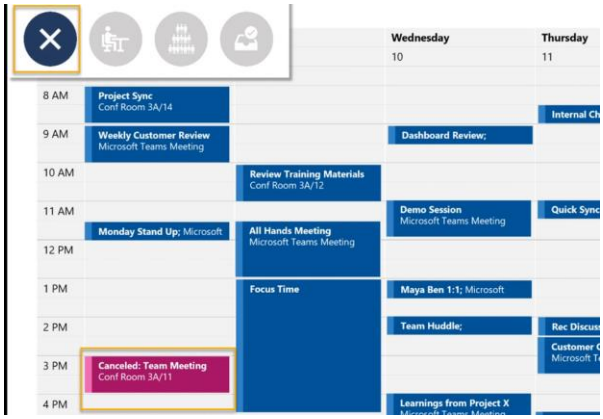




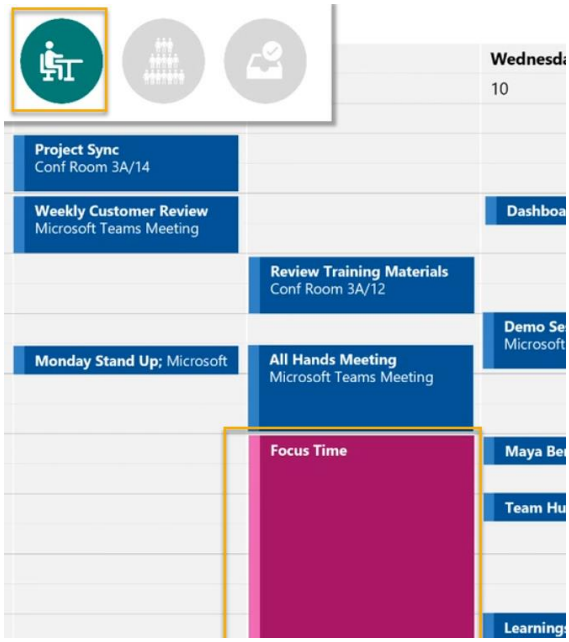


Default rules for **meeting exclusion rules**:

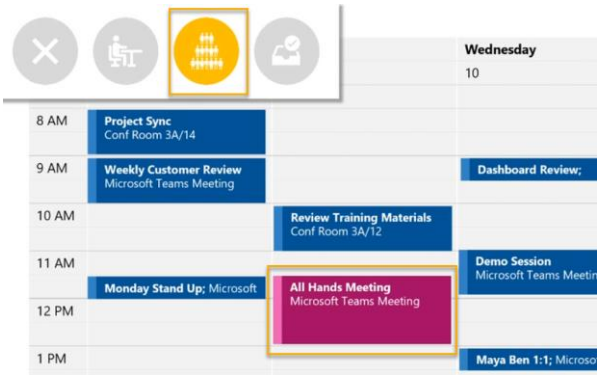
1. **Cancelled** Meetings



2. Only 1 attended like **Focus time.**



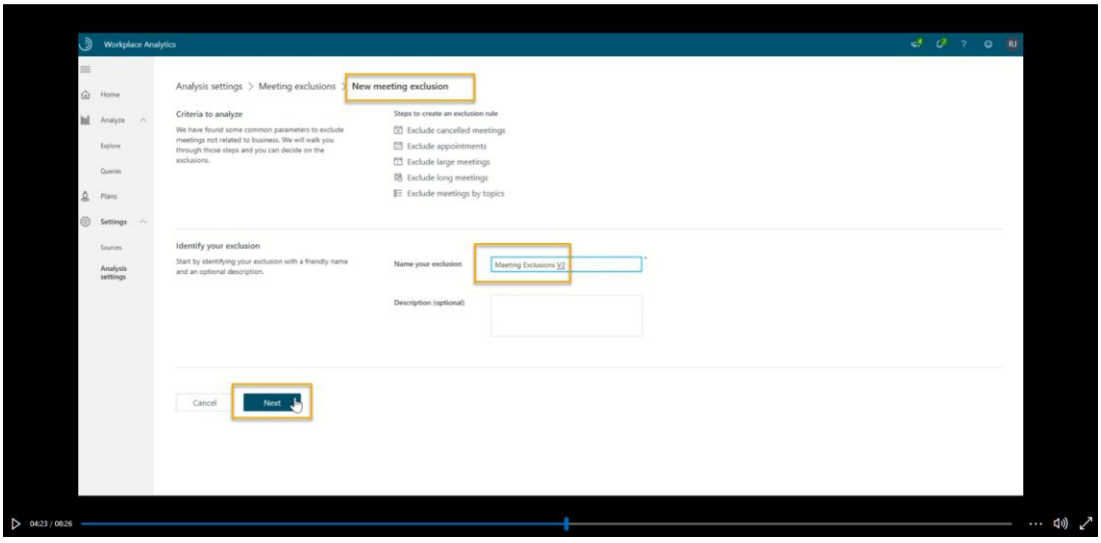
3. More than **250 attendees**



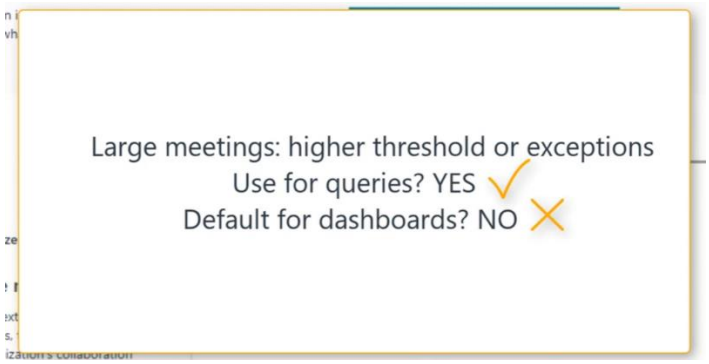
4. If meetings are more than **8 hours**



- Can customize rules.



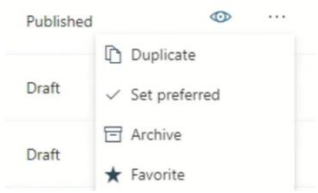
- > No of 250 attendees



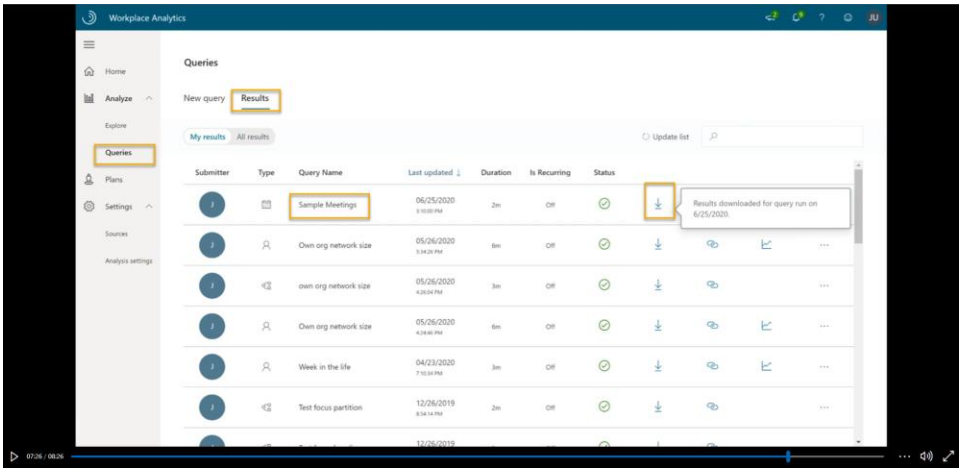
- Cad add more keywords



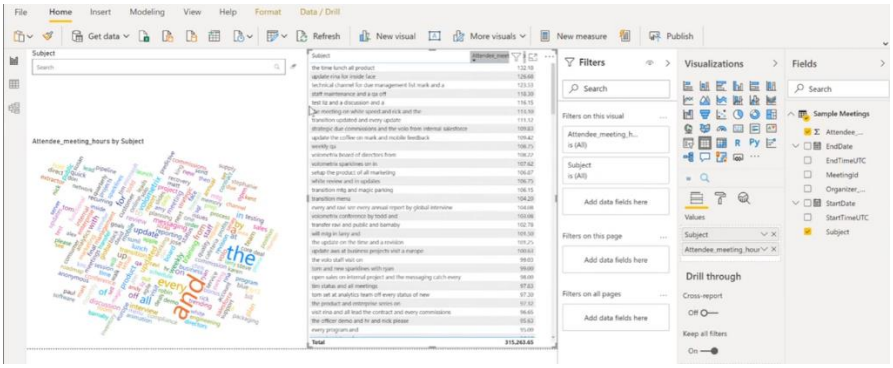
- Then you can set this as preferred rule set



- With new Meeting **(Sample meetings),** you can download locally.



- See data in Power BI.

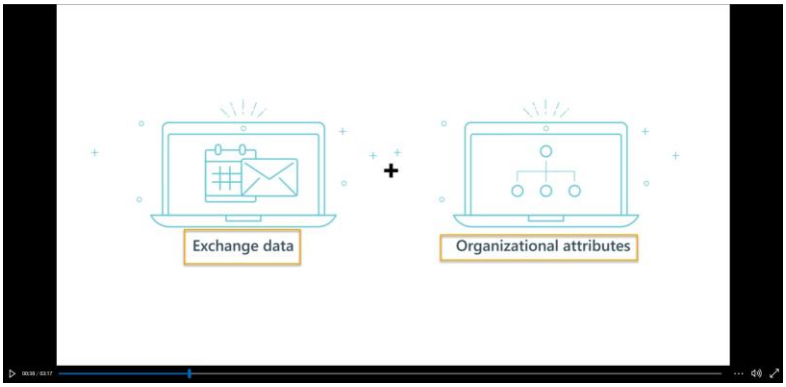


4. Onboarding process

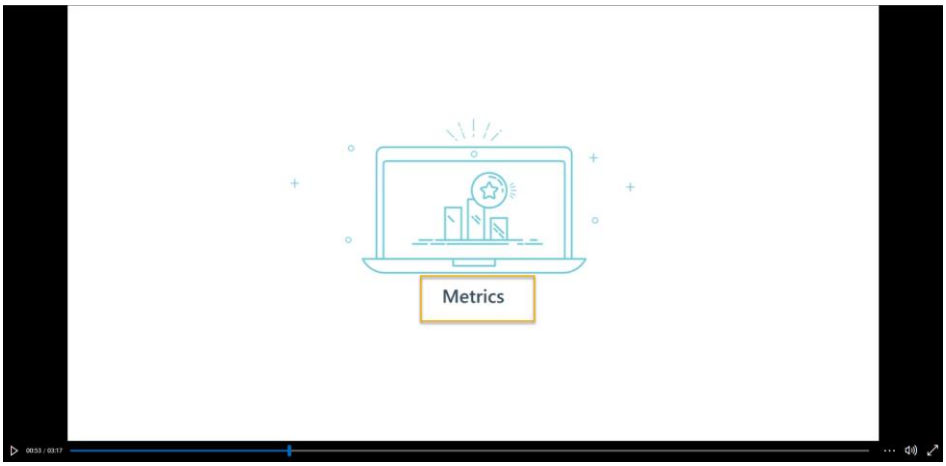
Overview for admins

- Watch the Overview for admins video (3 min)

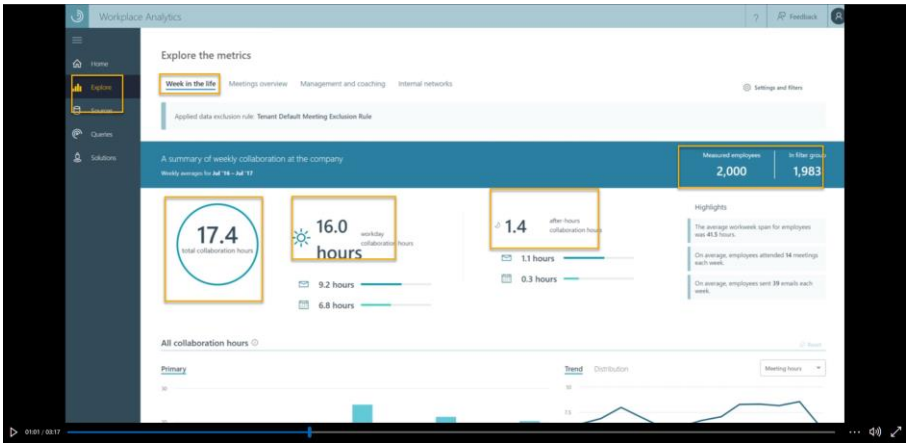
1. Use Exchange data
   +
2. Organizational attributes



3. Then we can see the **metrics**



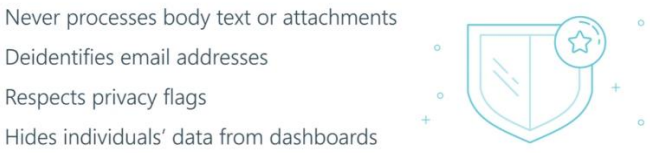
4. Dashboard



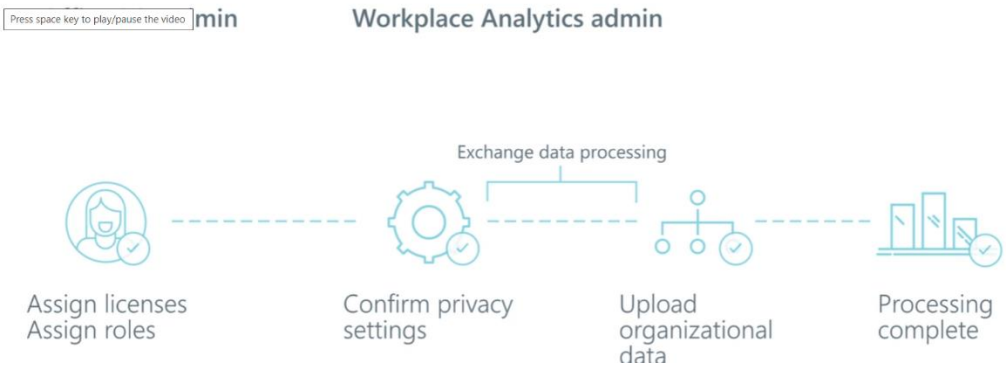
5. Workplace analytics

    1. **Never processes body test** or **attachments**
    2. **Deidentifies email addresses**
    3. **Respects privacy flags**

4. Hides Individual's data from Dashboard



- 4 Places to turn on Workplace analytics
    1. **Assign licenses** - Define scope of collaboration data
    2. **Assign roles** - Manage access to data.
    3. **Configure privacy settings** - Protect sensitive details
    4. **Upload Organizational data** - Select appropriate descriptive data



Assigning licenses

- Watch the Assign licenses video (1 min)

1. Role of Workplace Analytics licenses
2. How to assign licenses.

   Should have **E1, E3 or E5 license**.

   a) Can be assigned in the same way
   b) O365 Admin Center
   c) PowerShell
   d) Group-based licensing

- aka.ms/AssignWpALicenses

Ways to assign Microsoft 365 licenses | Microsoft Docs

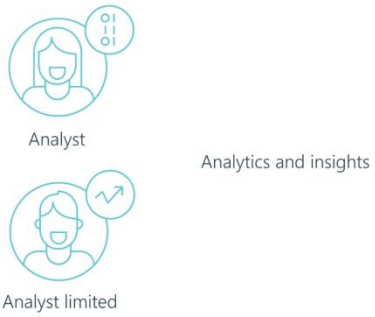
- Watch the Assign roles video (3 min)

- Types are 4 roles
    1. Admin
    2. Analysts
    3. Analysts limited
    4. Program manager

- Admin –
    1. Settings and privacy
    2. Upload Organizational data



- Analysts and Analysts limited
    1. Analytics and Insights



- **Program Manager**

    1. **Teamwork solution**



Press space key to play/pause the video

Teamwork solution

- Work on 3 roles

Press space key to play/pause the video



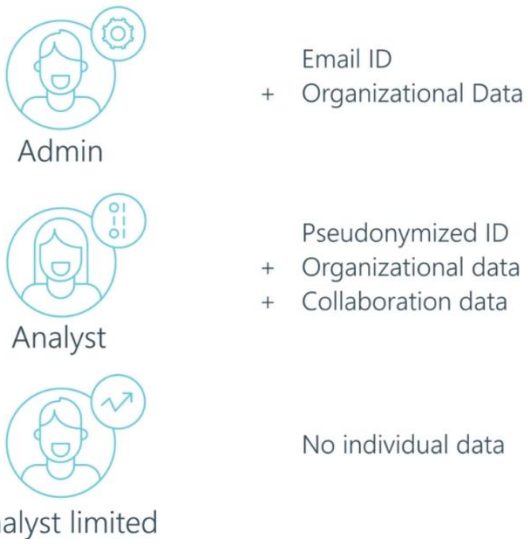
1. Admin - Settings page test

2. Analysts –
    1. Explore Dashboards
    2. Flexile queries

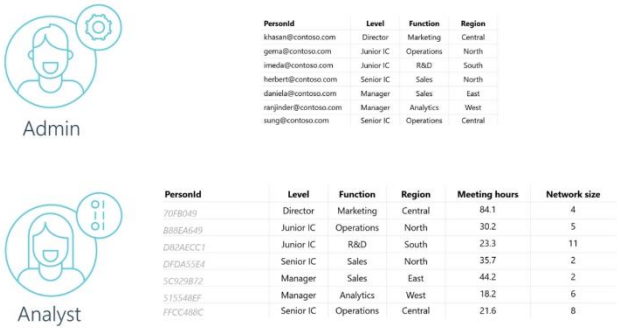
3. Analysts limited
    1. Explore dashboards



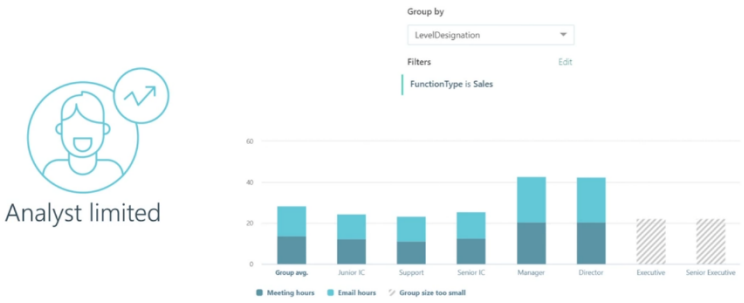
-

- 

- Admin vs Analyst pseudonymized



- Analyst limited

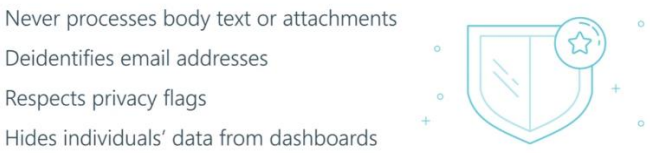


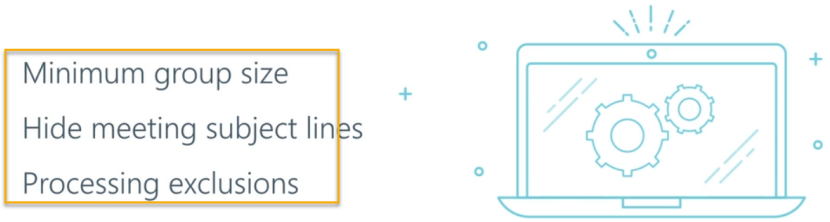
-

Privacy options

- Watch the Privacy options video (5 min)

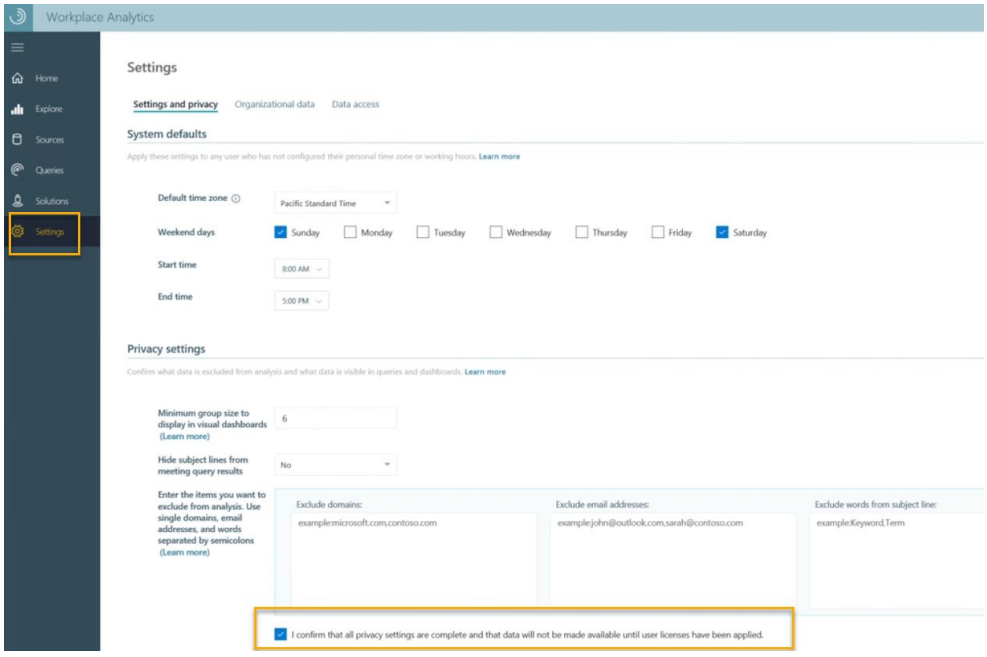
1. Never processes body test or attachments
2. Deidentifies email addresses
3. Respects privacy flags
4. Hides Individual's data from Dashboard





2.

3. Done in **Settings** page



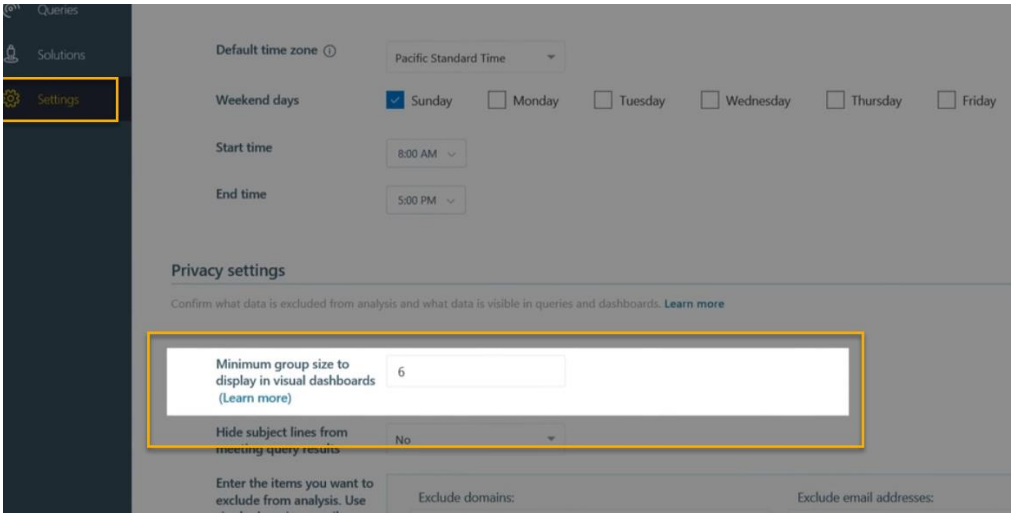
Different privacy options

1. **Minimum Size Group**

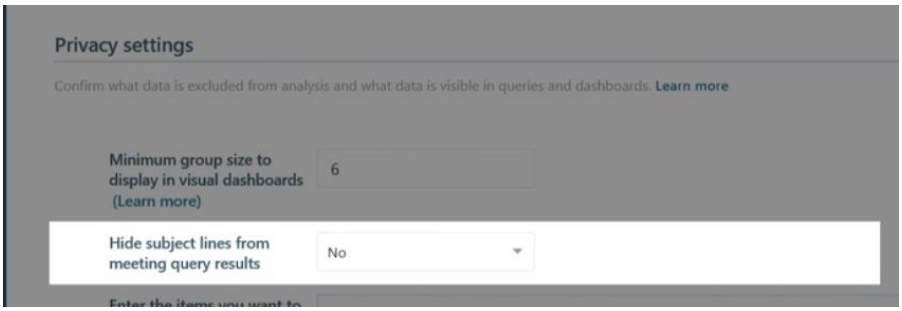


No Induvial and only groups

Admin can add Minimum Size Group



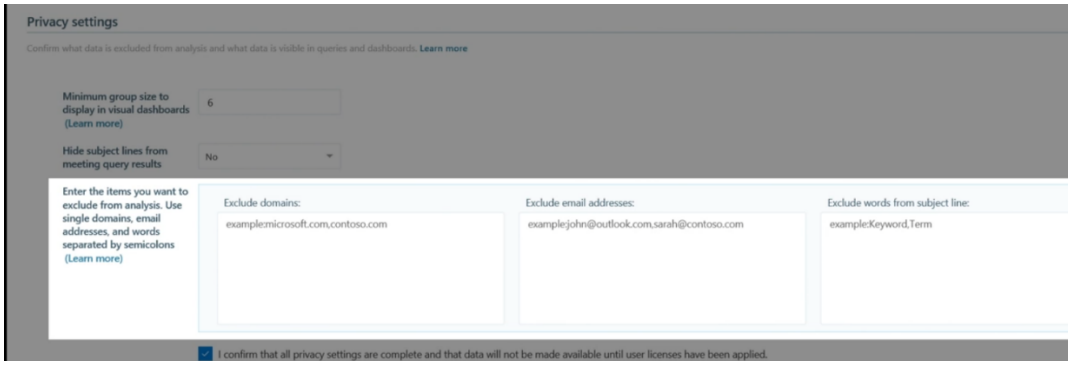
2. Hide subject lines from meeting query results



Can use **Meeting Query** or **Custom metric**



3. Enter items you want to exclude
   Exclude domains, Exclude email, Exclude subject line.

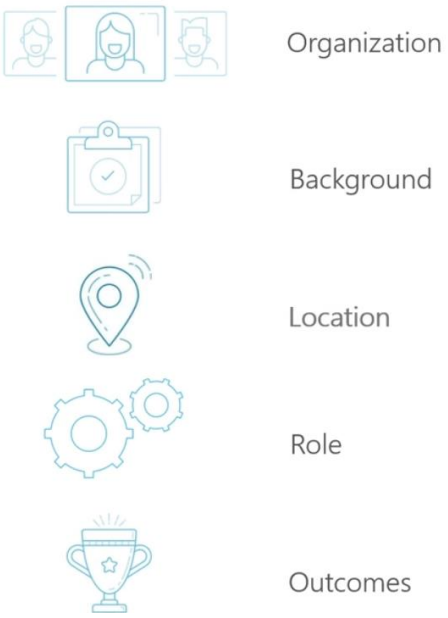


Working with organizational data

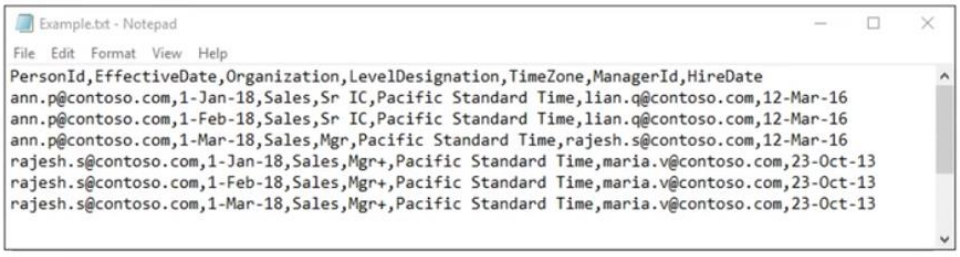
- Watch the Purpose of organizational data video (5 min)

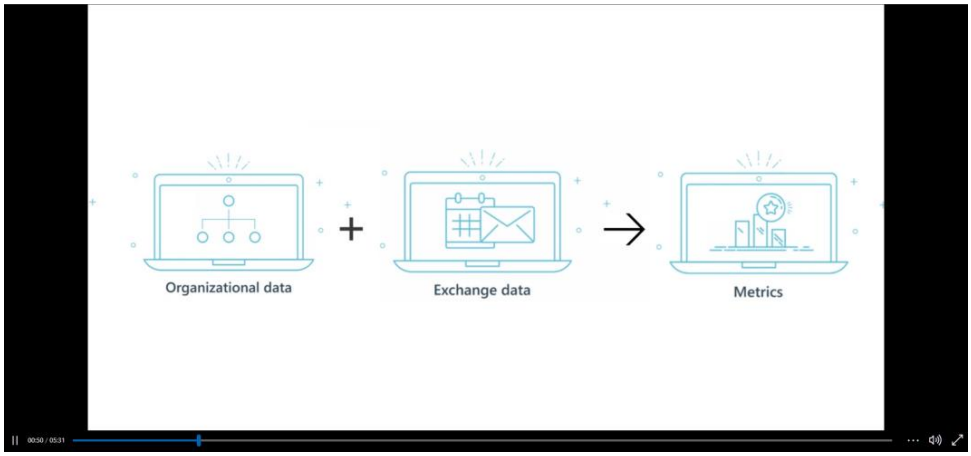
1. Organization
2. Background
3. Location
4. Role

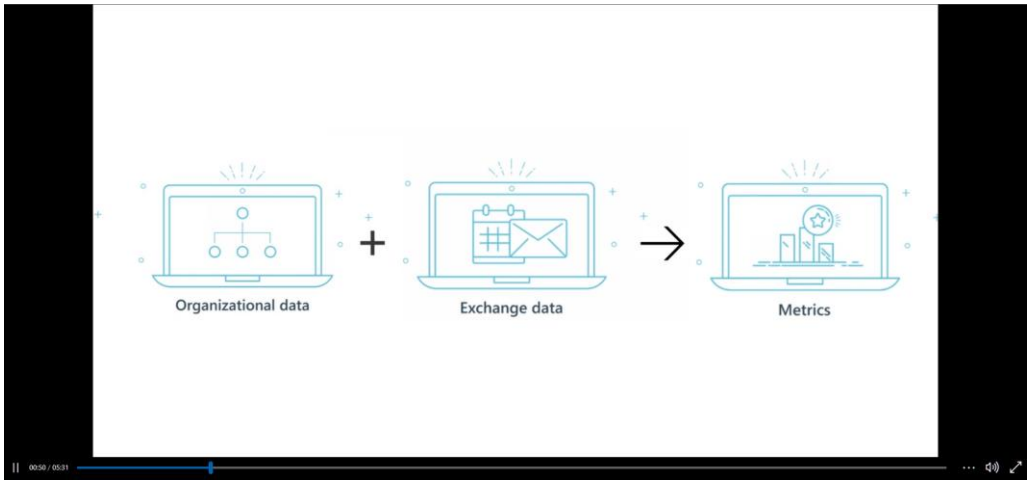
5. Outcomes

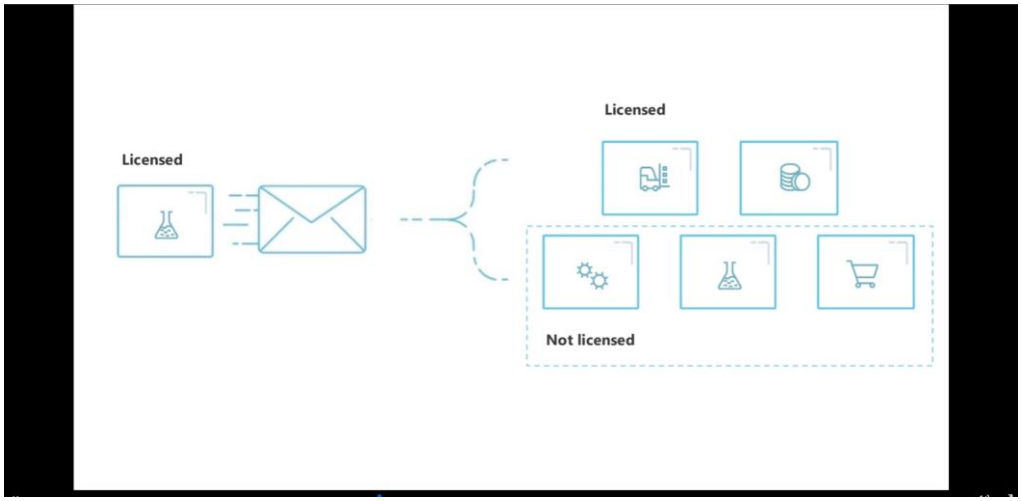


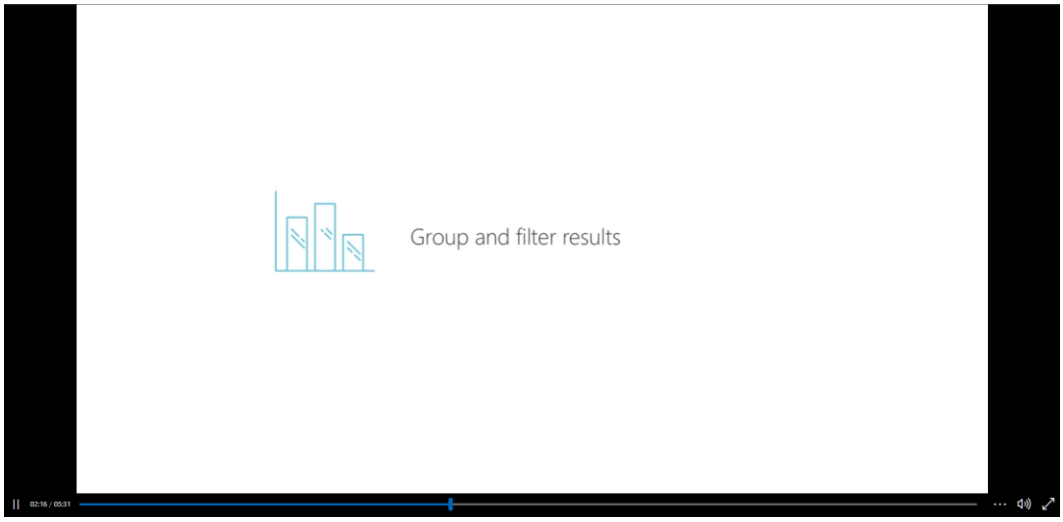
Uploaded as CSV file



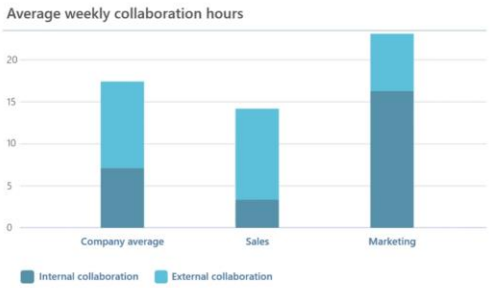



Organizational data
Exchange data
Metrics
00:50 / 05:31


Licensed
Licensed
Not licensed


Group and filter results
02:16 / 05:31

Group and filter results





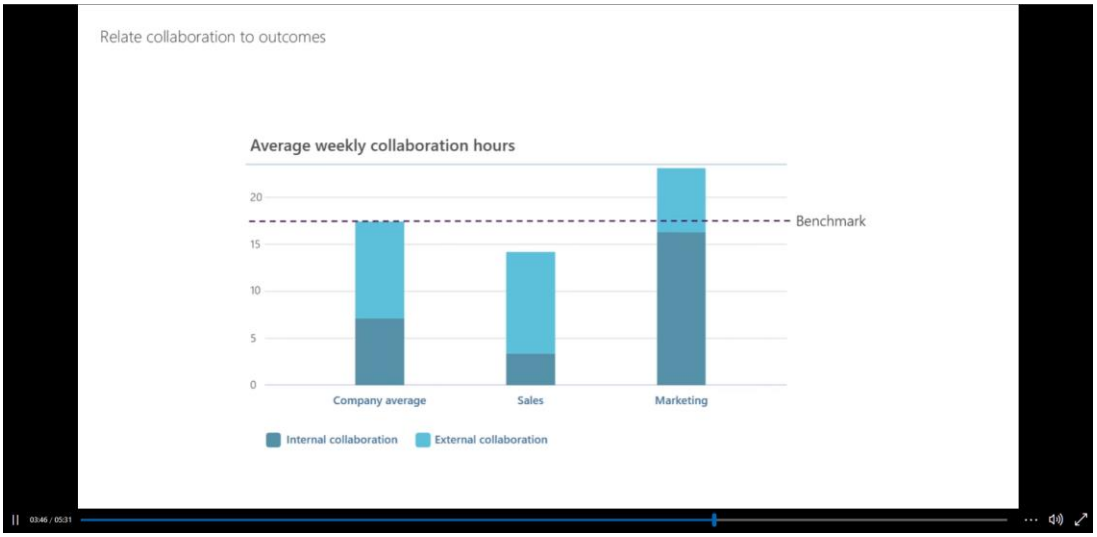
Relate collaboration to outcomes

Relate collaboration to outcomes

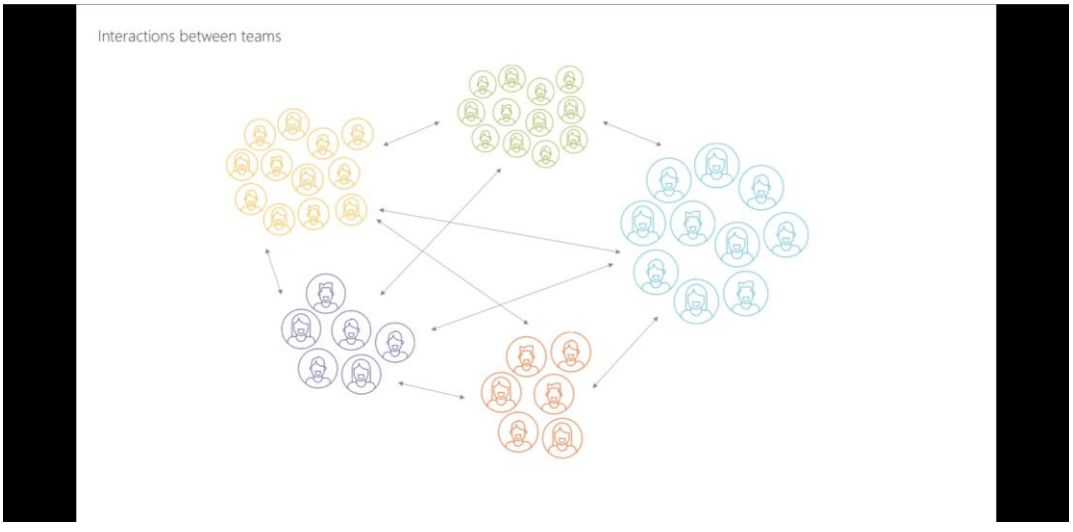


Performance rating
Engagement-survey responses
Sales-quota attainment
Team revenue
Manager-effectiveness rating

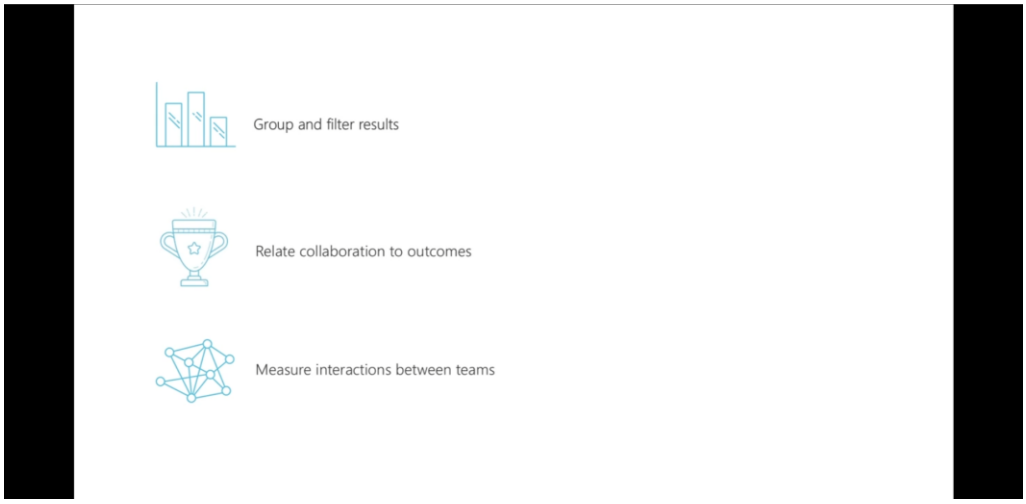
Pause
03:31 / 05:31


Relate collaboration to outcomes
Average weekly collaboration hours
20
15
10
5
0
Benchmark
Company average
Sales
Marketing
Internal collaboration
External collaboration
03:46 / 05:31


Relate collaboration to outcomes
Average weekly collaboration hours
20
15
10
5
0
Sales average
Top performing Sales
Other Sales
Internal collaboration
External collaboration
04:02 / 05:31


Interactions between teams

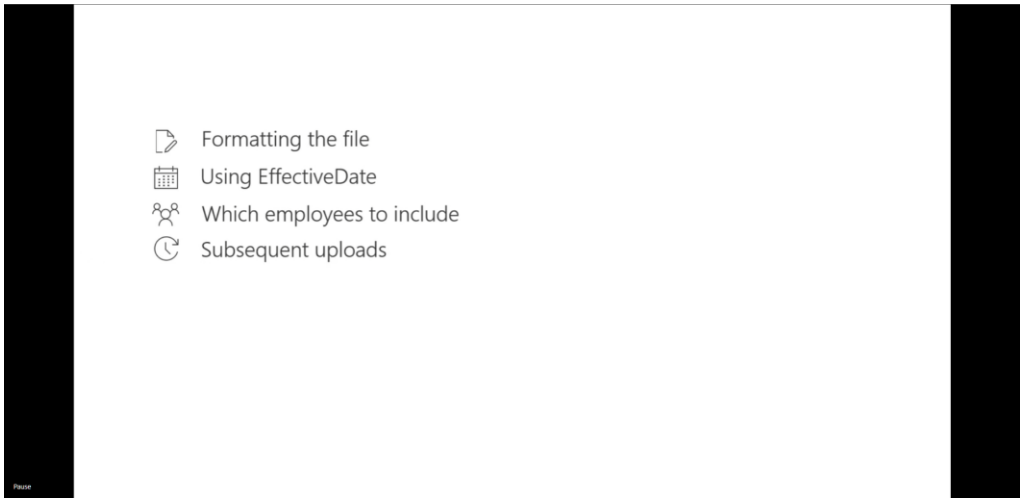


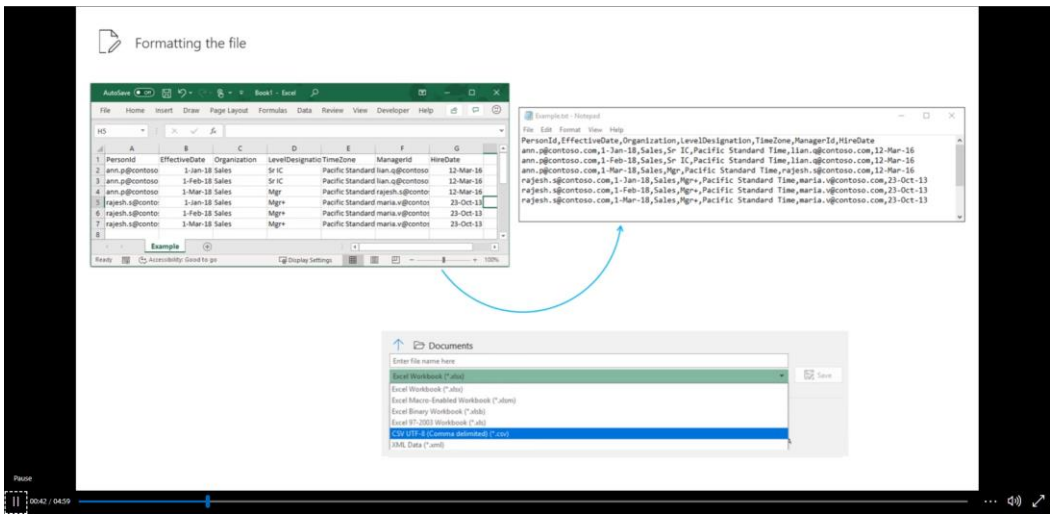


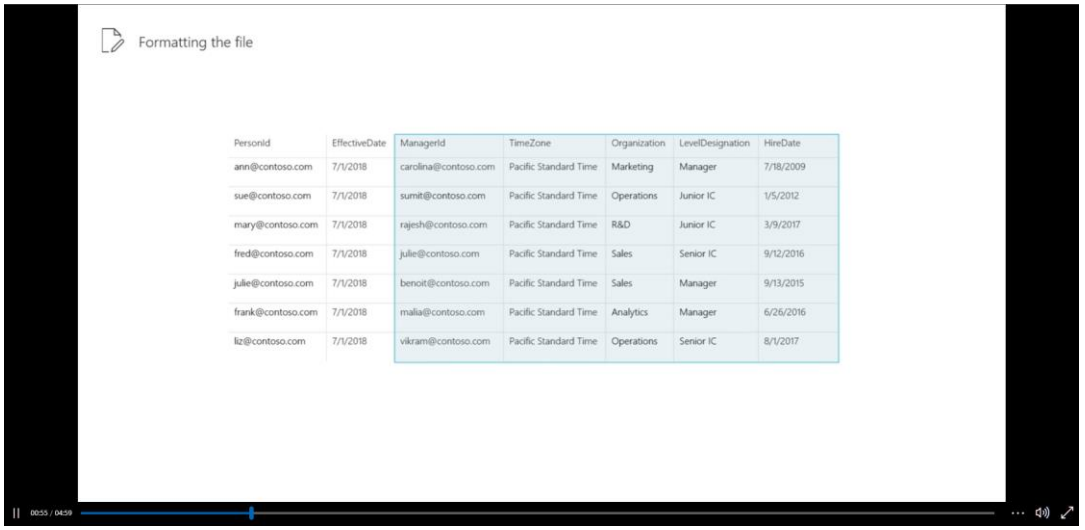
Watch the Structuring organizational data video (5 min)

- Structuring organizational data rules

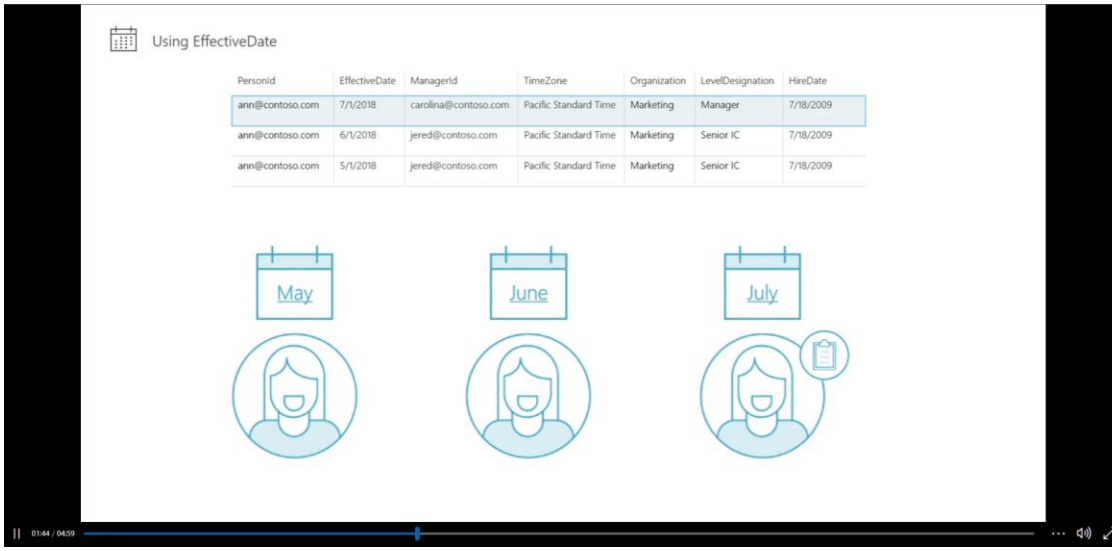
    1. Format the file
    2. Use Effective Date
    3. Which employees to include
    4. Subsequent uploads

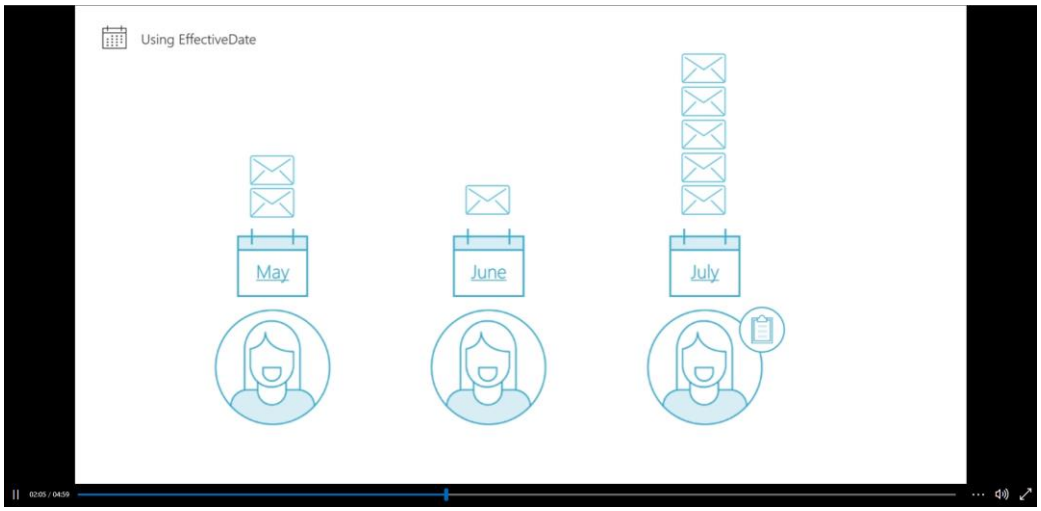


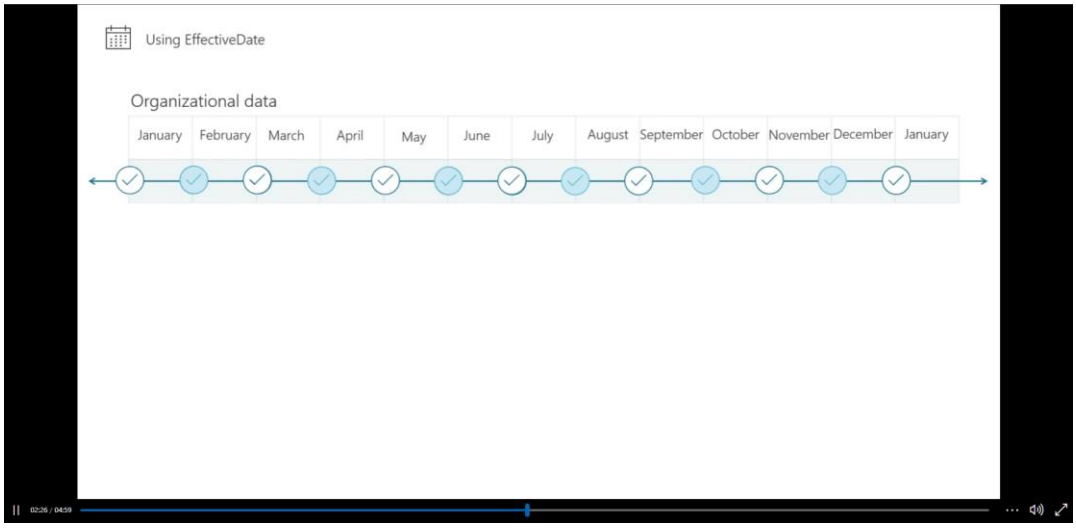


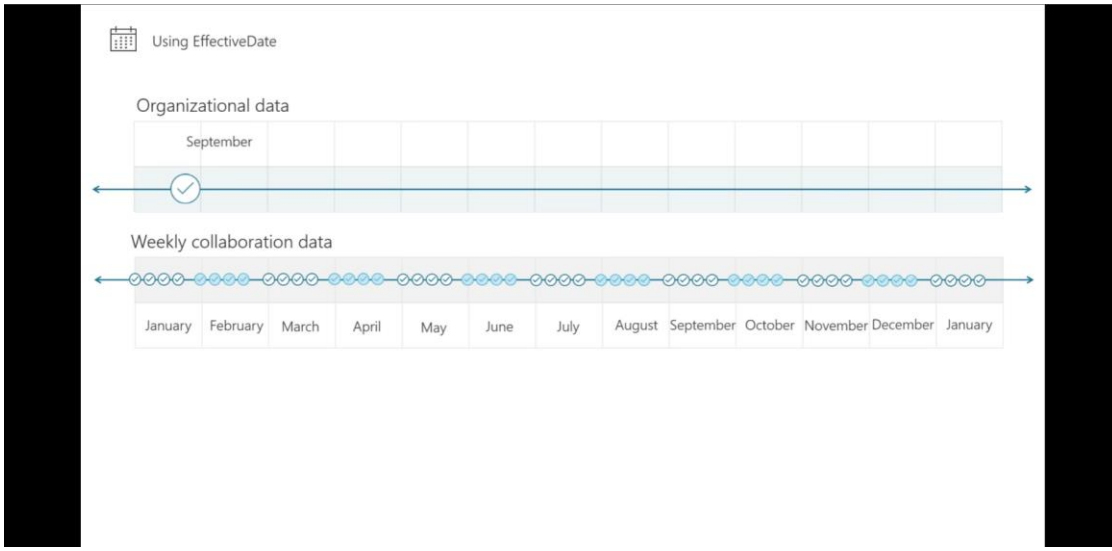


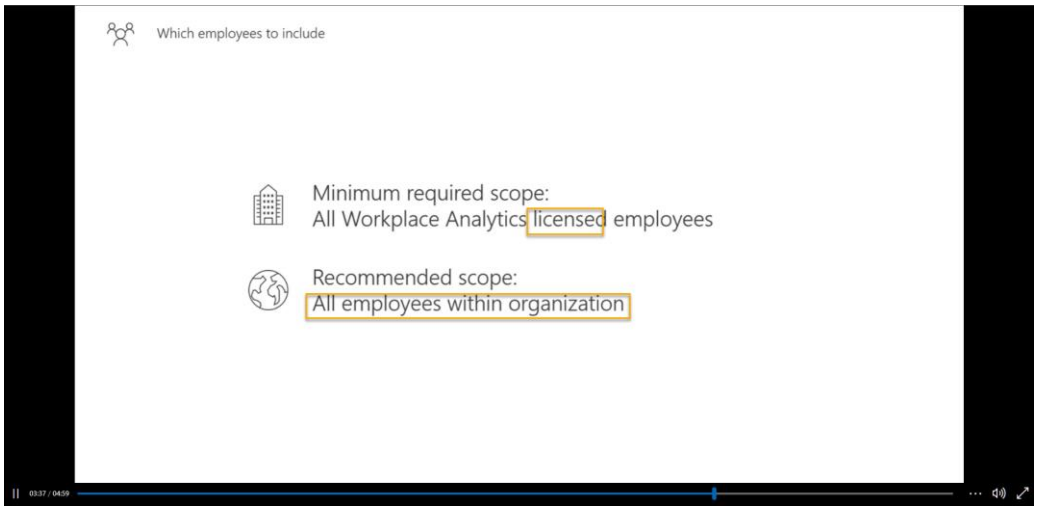
PersonId	EffectiveDate	ManagerId	TimeZone	Organization	LevelDesignation	HireDate
ann@contoso.com	7/1/2018	carolina@contoso.com	Pacific Standard Time	Marketing	Manager	7/18/2009
sue@contoso.com	7/1/2018	sumit@contoso.com	Pacific Standard Time	Operations	Junior IC	1/5/2012
mary@contoso.com	7/1/2018	rajesh@contoso.com	Pacific Standard Time	R&D	Junior IC	3/9/2017
fred@contoso.com	7/1/2018	julie@contoso.com	Pacific Standard Time	Sales	Senior IC	9/12/2016
julie@contoso.com	7/1/2018	benoit@contoso.com	Pacific Standard Time	Sales	Manager	9/13/2015
frank@contoso.com	7/1/2018	malia@contoso.com	Pacific Standard Time	Analytics	Manager	6/26/2016
liz@contoso.com	7/1/2018	vikram@contoso.com	Pacific Standard Time	Operations	Senior IC	8/1/2017

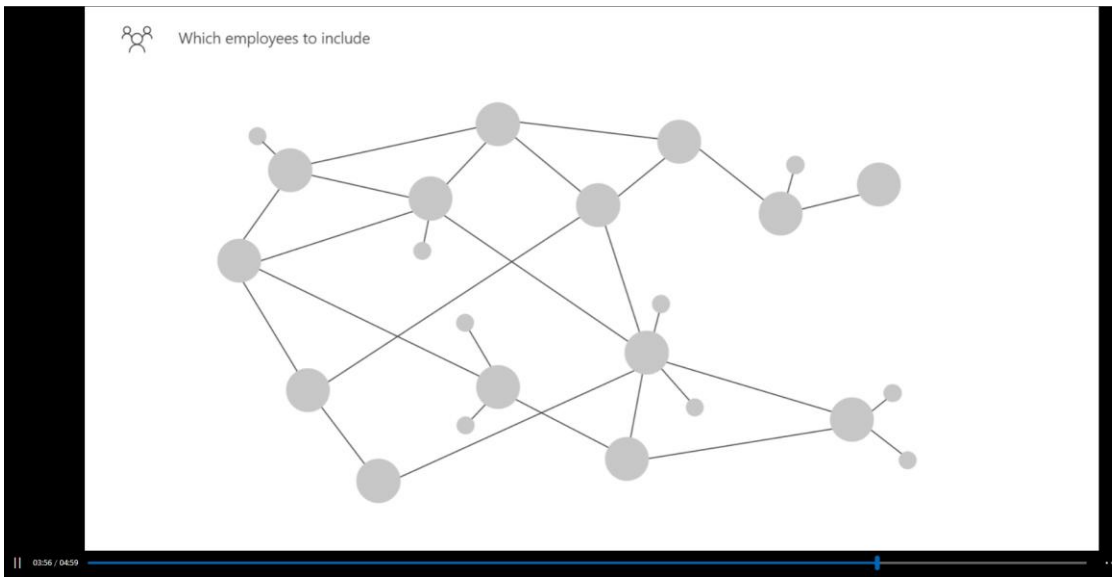

Using EffectiveDate
PersonId EffectiveDate ManagerId TimeZone Organization LevelDesignation HireDate
ann@contoso.com 7/1/2018 carolina@contoso.com Pacific Standard Time Marketing Manager 7/18/2009
ann@contoso.com 6/1/2018 jered@contoso.com Pacific Standard Time Marketing Senior IC 7/18/2009
ann@contoso.com 5/1/2018 jered@contoso.com Pacific Standard Time Marketing Senior IC 7/18/2009
May
June
July
01:44 / 04:59

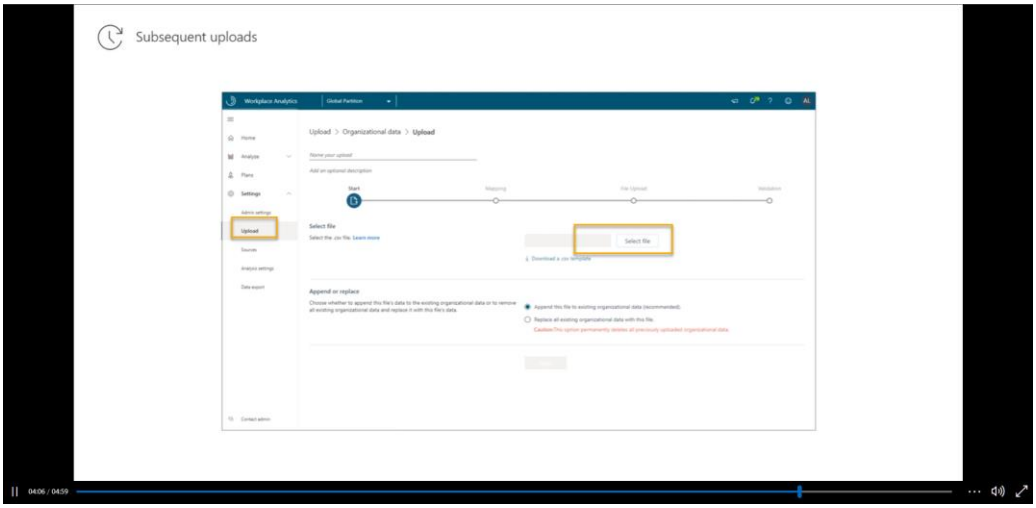

Using EffectiveDate
May
June
July
02:05 / 04:59


Using EffectiveDate
Organizational data
January February March April May June July August September October November December January
02:26 / 04:59


Using EffectiveDate
Organizational data
September
Weekly collaboration data
January
February
March
April
May
June
July
August
September
October
November
December
January

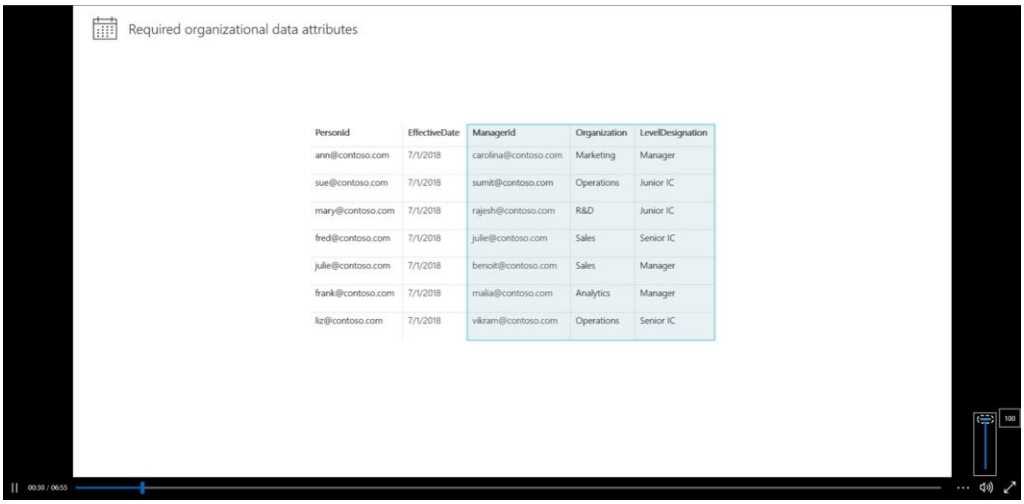

Which employees to include
Minimum required scope:
All Workplace Analytics licensed employees
Recommended scope:
All employees within organization
03:37 / 04:59

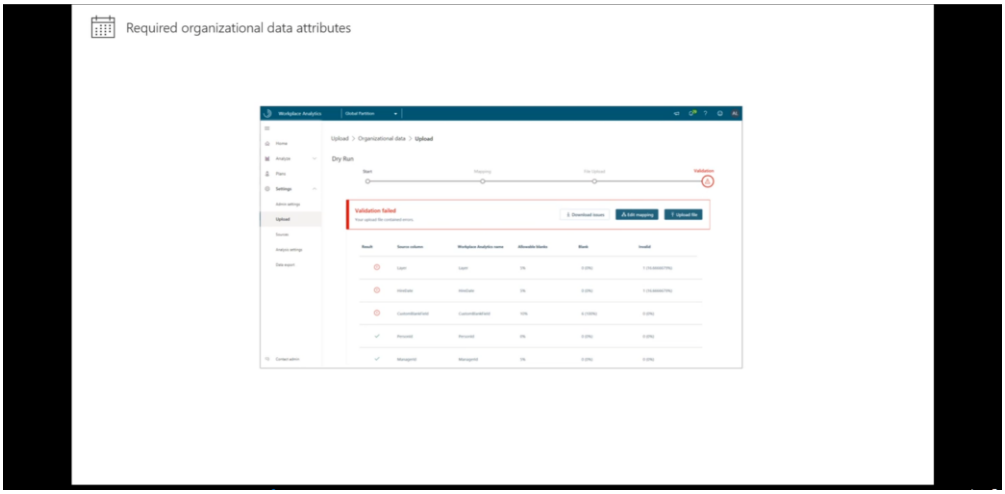

Which employees to include
03:56 / 04:59

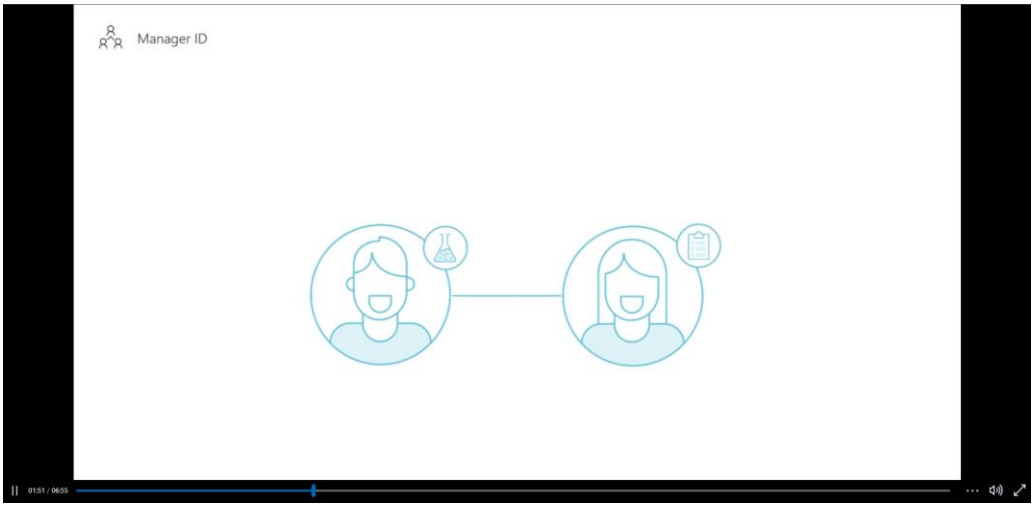


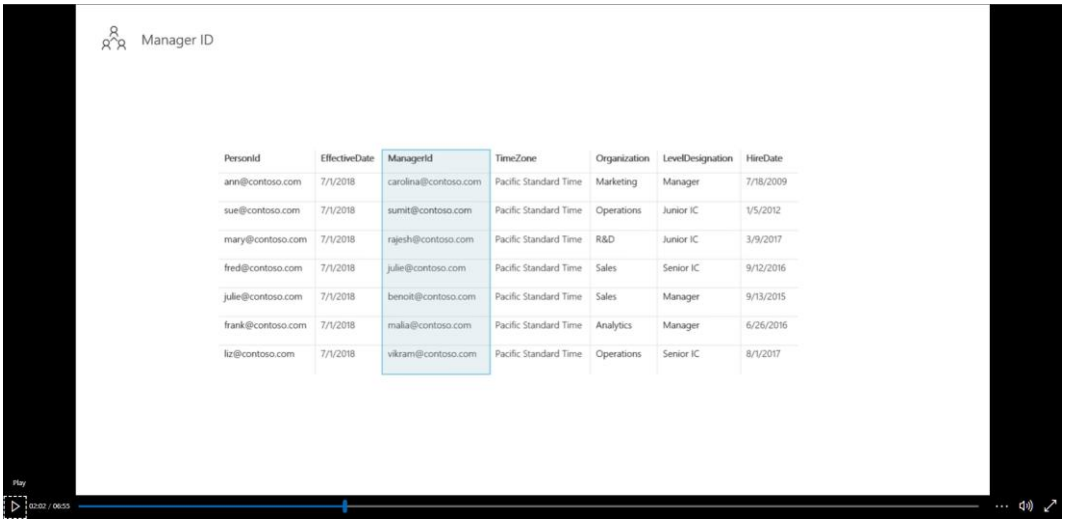
Required and optional organizational data

- Watch the [Required and optional organizational data] video (7 min)

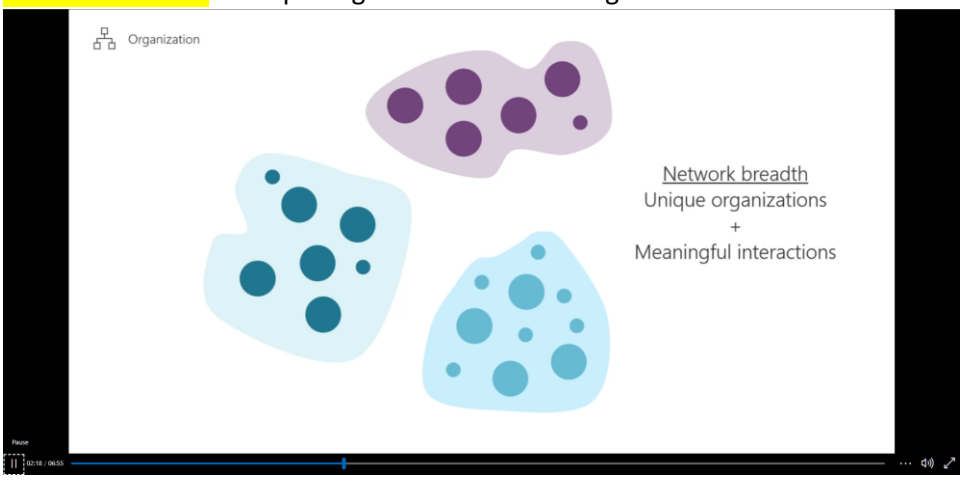


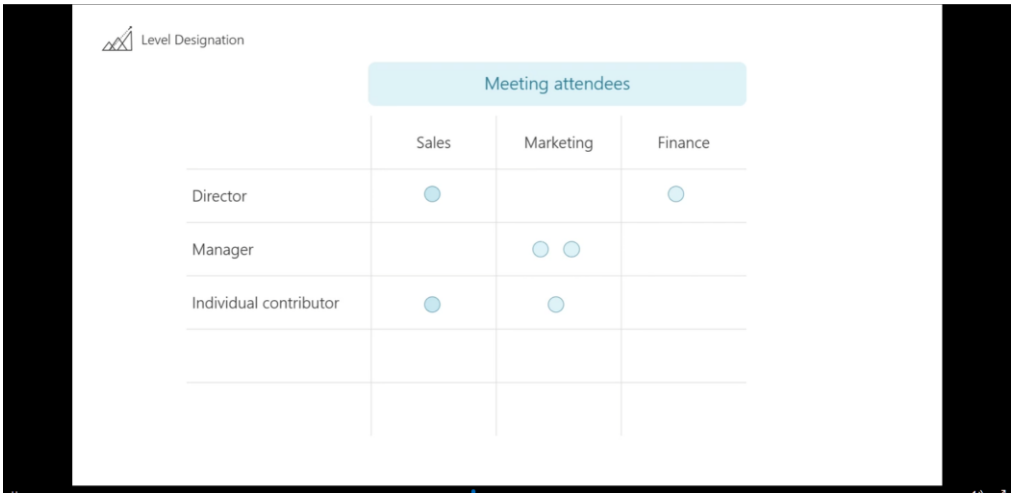






- Network breadth = unique organizations + Meaningful interactions



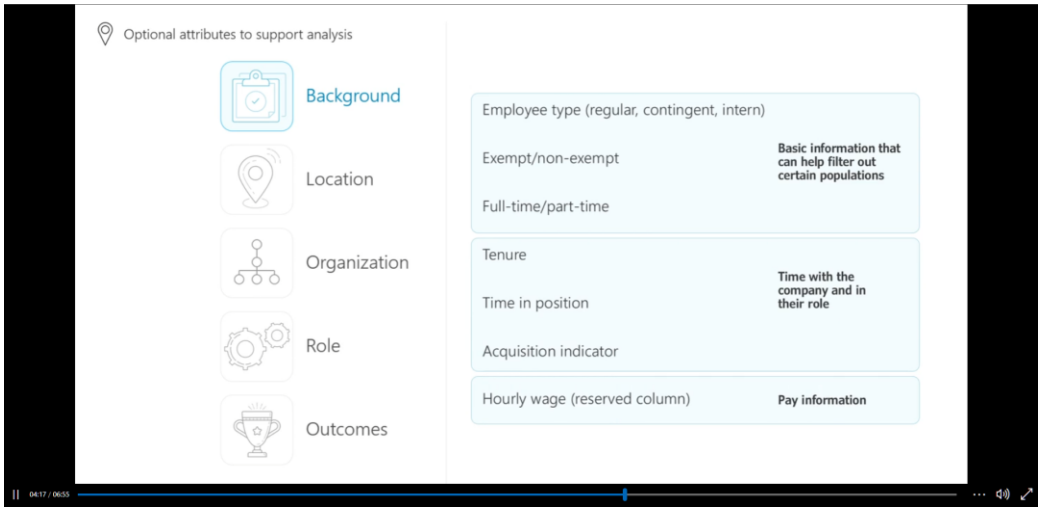


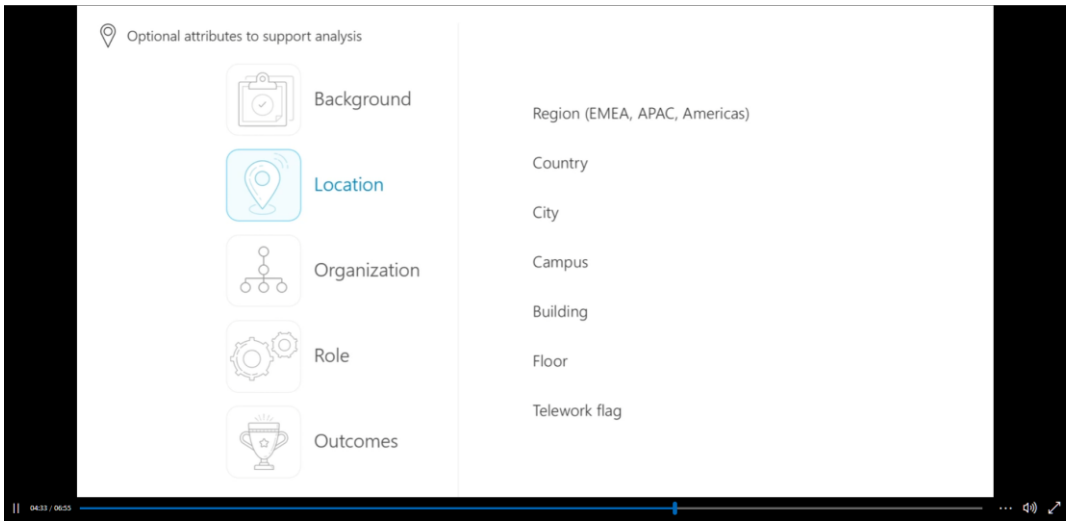
required and optional

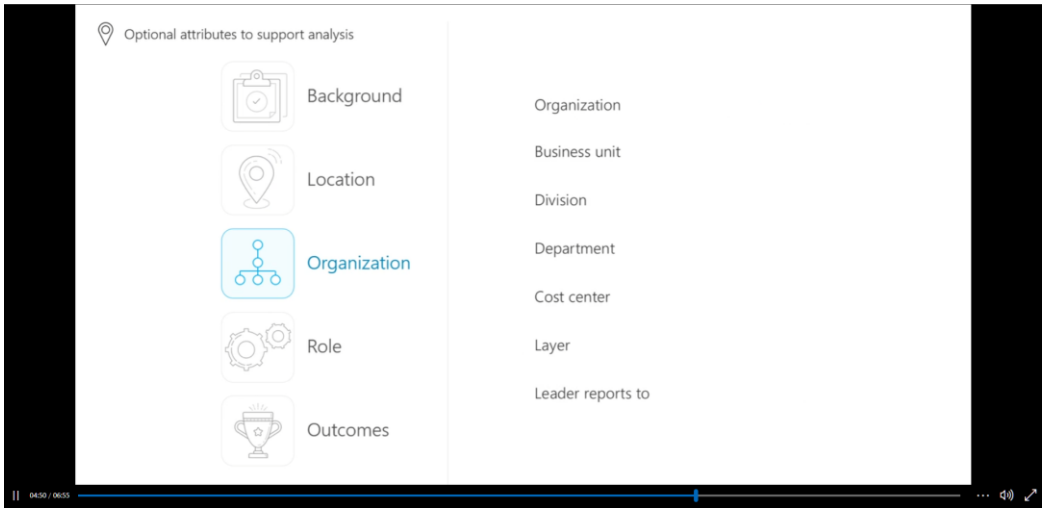
Optional attributes to support analysis

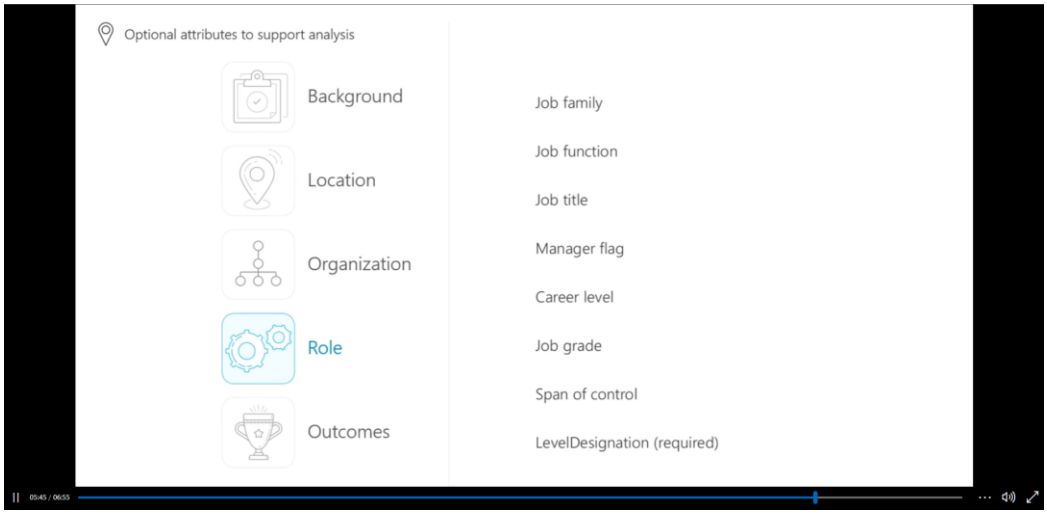
Required	Optional
PersonId	Up to 60 additional columns
EffectiveDate	
Organization	
LevelDesignation	
ManagerId	

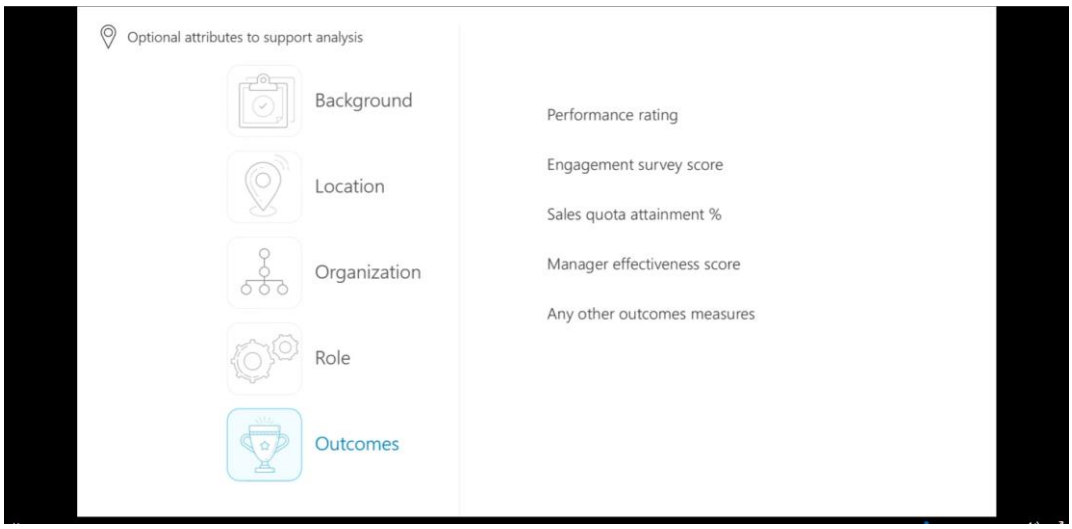
-
    1. Background
    2. Location
    3. Organization
    4. Role
    5. Outcomes







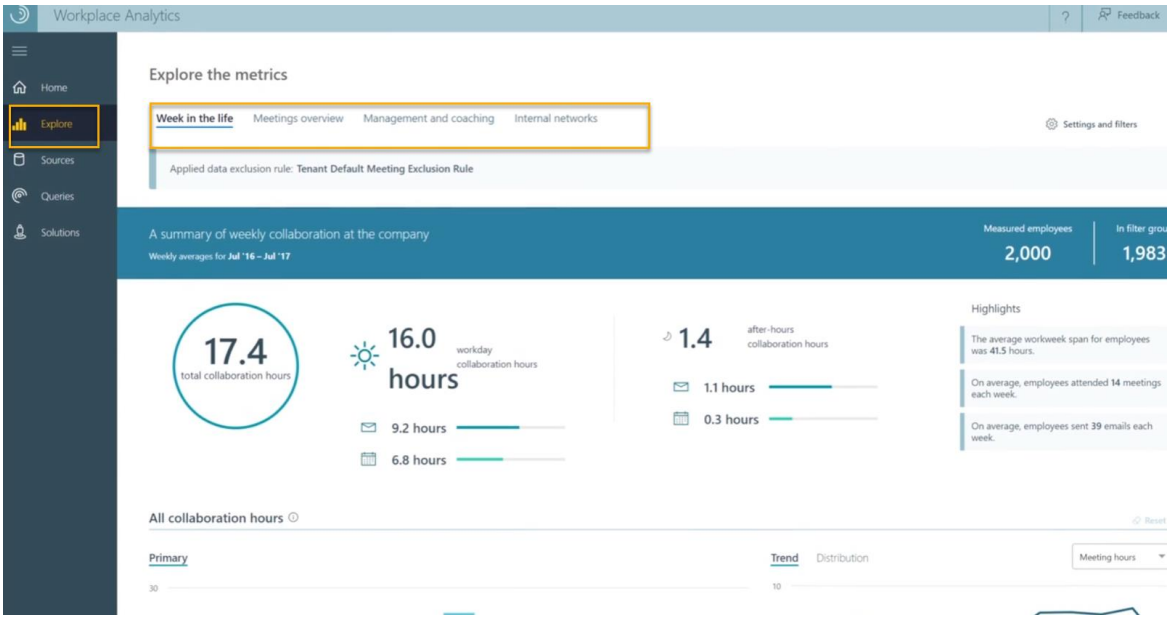




Uploading organizational data

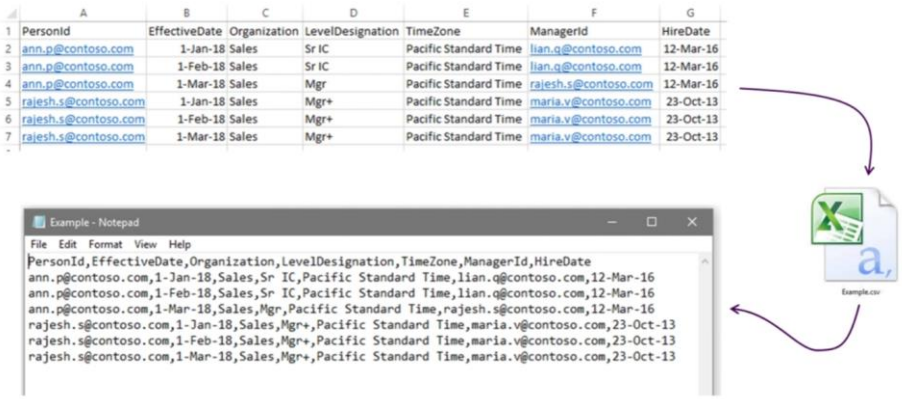
- Watch the Uploading organizational data video (3 min)

Uploading organizational data

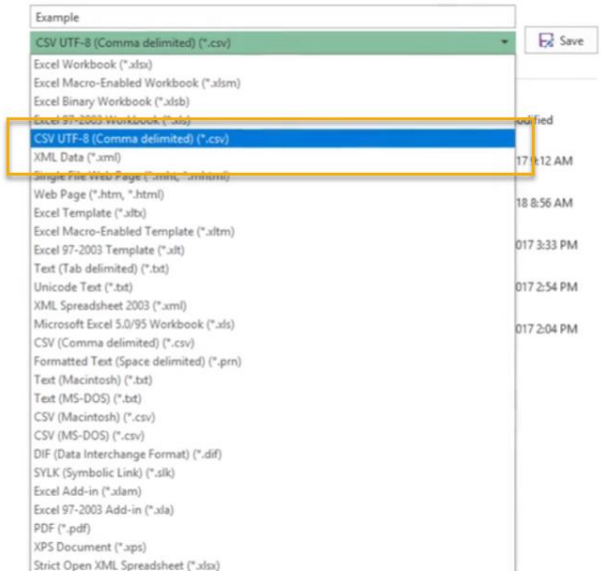


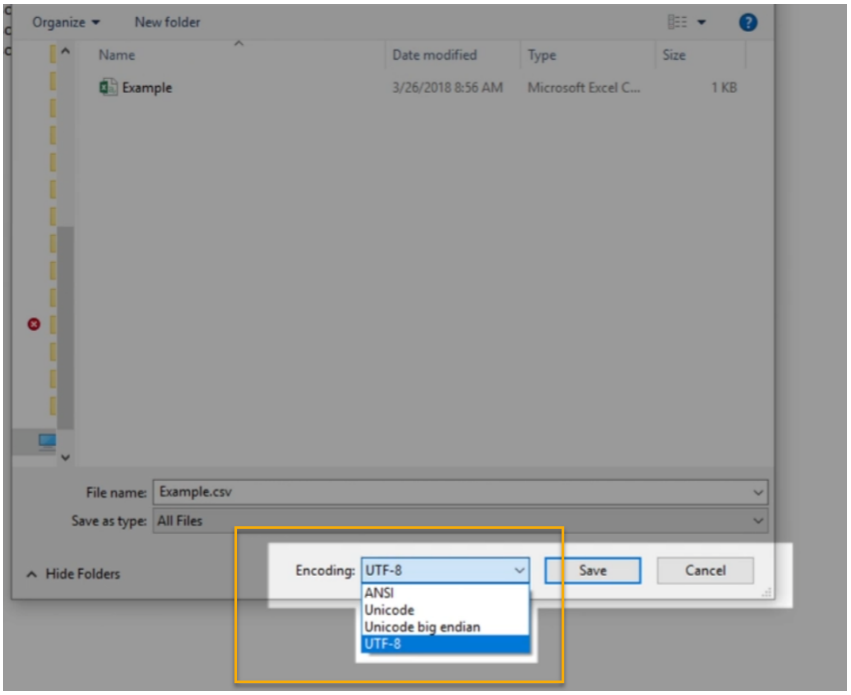
3 steps

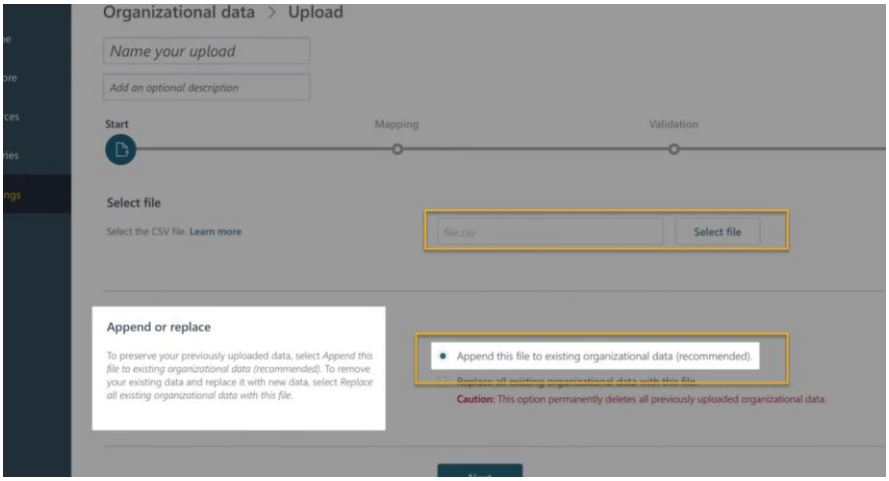
1. **Confirm file encoding**

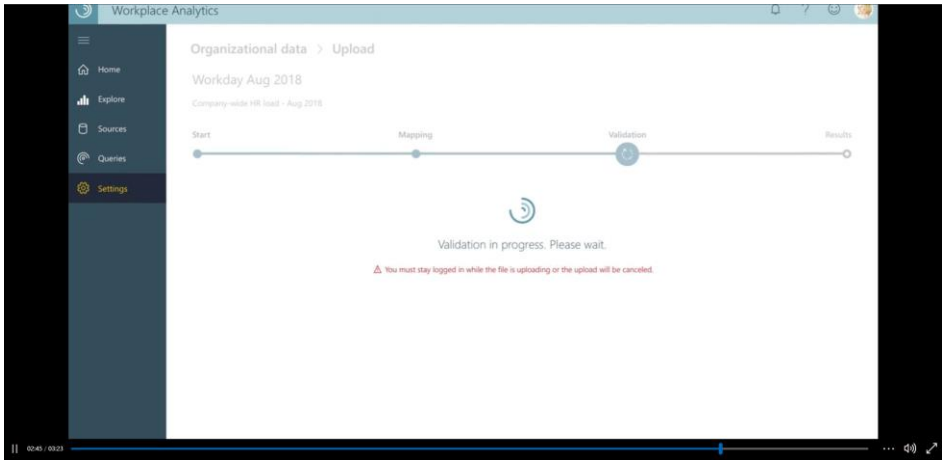


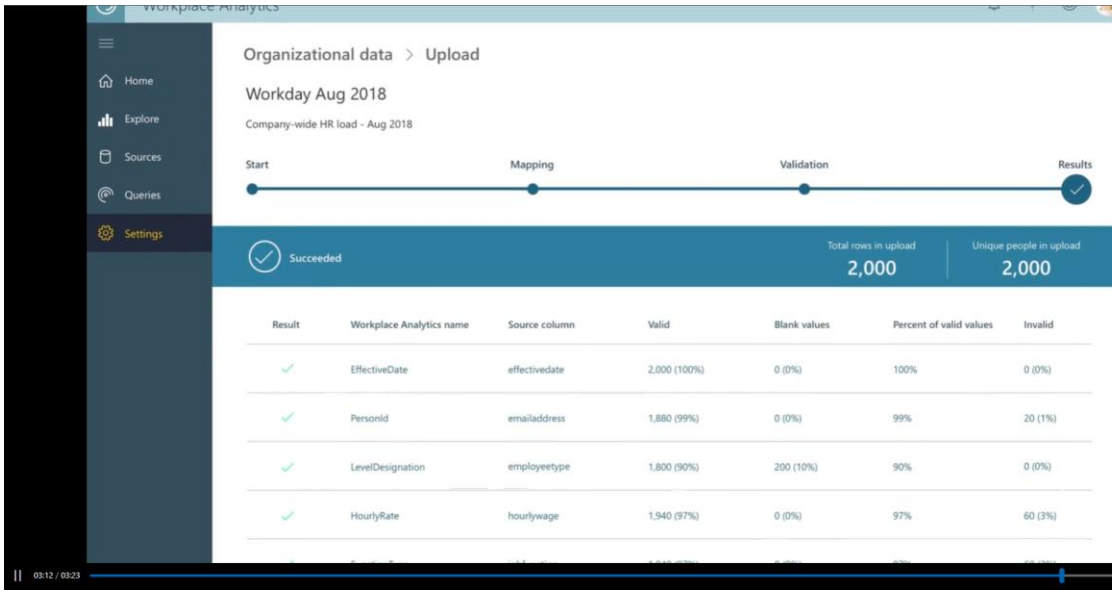
UTF-8 encoding


Example
CSV UTF-8 (Comma delimited) (*.csv)
Save
Excel Workbook (*.xlsx)
Excel Macro-Enabled Workbook (*.xlsm)
Excel Binary Workbook (*.xlsb)
CSV UTF-8 (Comma delimited) (*.csv)
XML Data (*.xml)
Web Page (*.htm, *.html)
Excel Template (*.xltx)
Excel Macro-Enabled Template (*.xltm)
Excel 97-2003 Template (*.xlt)
Text (Tab delimited) (*.txt)
Unicode Text (*.txt)
XML Spreadsheet 2003 (*.xml)
Microsoft Excel 5.0/95 Workbook (*.xls)
CSV (Comma delimited) (*.csv)
Formatted Text (Space delimited) (*.prn)
Text (Macintosh) (*.txt)
Text (MS-DOS) (*.txt)
CSV (Macintosh) (*.csv)
CSV (MS-DOS) (*.csv)
DIF (Data Interchange Format) (*.dif)
SYLK (Symbolic Link) (*.slk)
Excel Add-in (*.xlam)
Excel 97-2003 Add-in (*.xla)
PDF (*.pdf)
XPS Document (*.xps)
Strict Open XML Spreadsheet (*.xlsx)


Organize
New folder
Name
Date modified
Type
Size
Example
3/26/2018 8:56 AM
Microsoft Excel C...
1 KB
File name: Example.csv
Save as type: All Files
Hide Folders
Encoding: UTF-8
Save
Cancel
ANSI
Unicode
Unicode big endian
UTF-8


Organizational data > Upload
Name your upload
Add an optional description
Start
Mapping
Validation
Select file
Select the CSV file. Learn more
file.csv
Select file
Append or replace
To preserve your previously uploaded data, select Append this file to existing organizational data (recommended). To remove your existing data and replace it with new data, select Replace all existing organizational data with this file.
Append this file to existing organizational data (recommended).
Caution: This option permanently deletes all previously uploaded organizational data.





2. **Map Column headers**

3. **Validate file**

Confirm file encoding

Map column headers

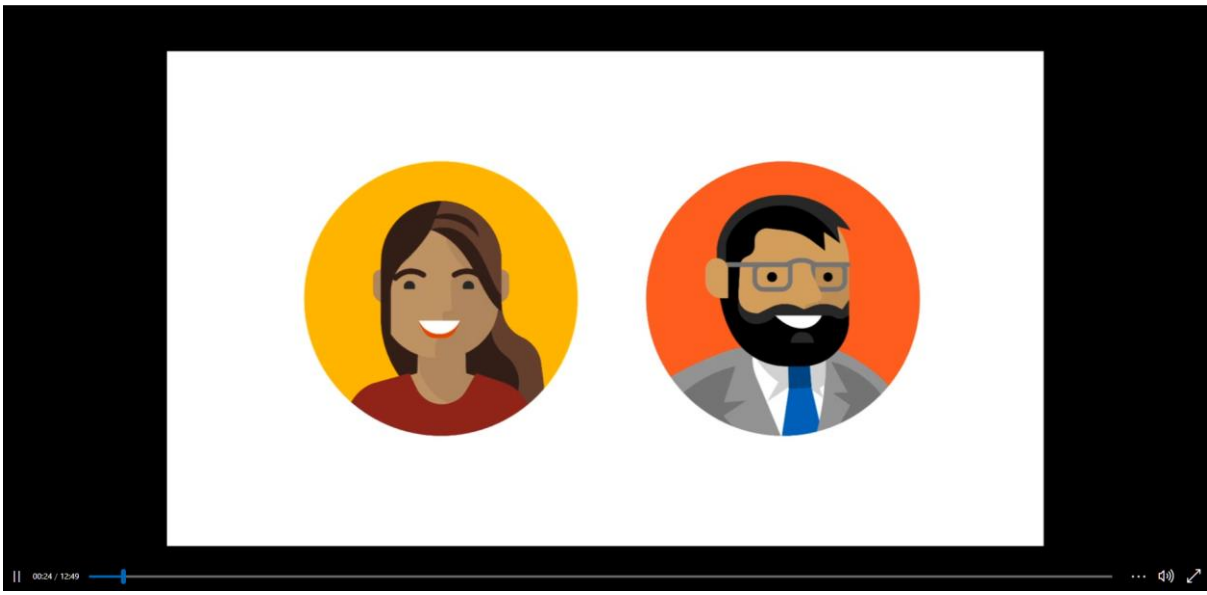
Validate file

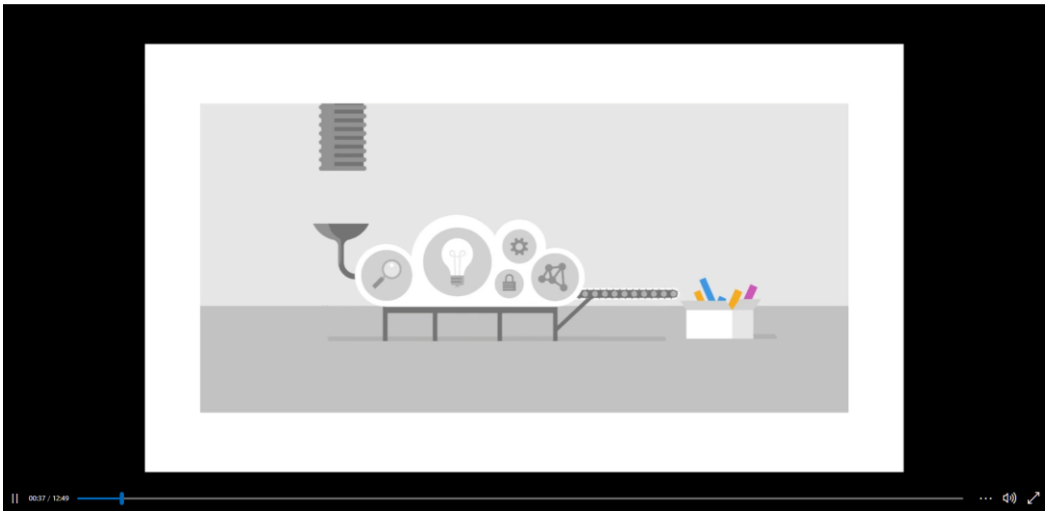
Working with queries

- Complete the hands-on exercise in the Using Person Queries: “Week in the Life” analysis video (13 min) [1]

  For Stakeholder

  Person query





Introduce a stakeholder to Workplace Analytics

Highlight a few easy-to-understand metrics

Show them numbers for their own team

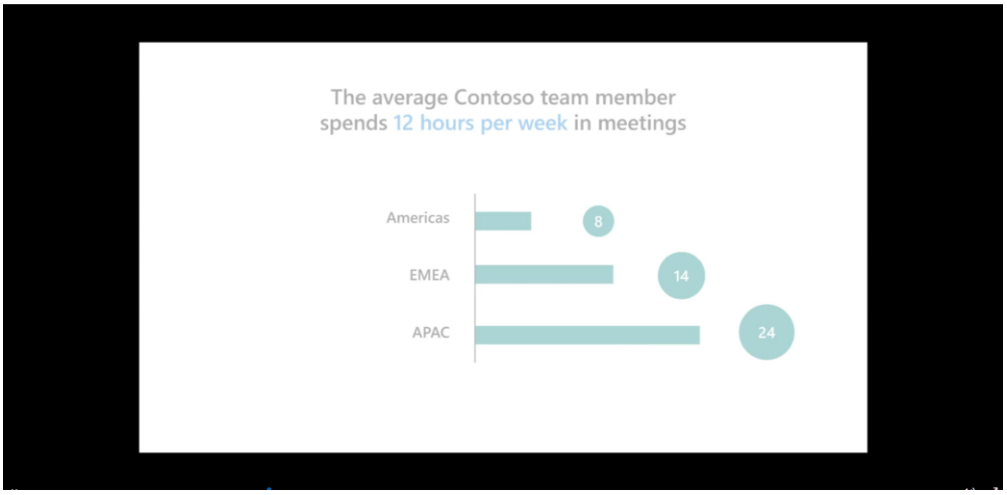
Pause

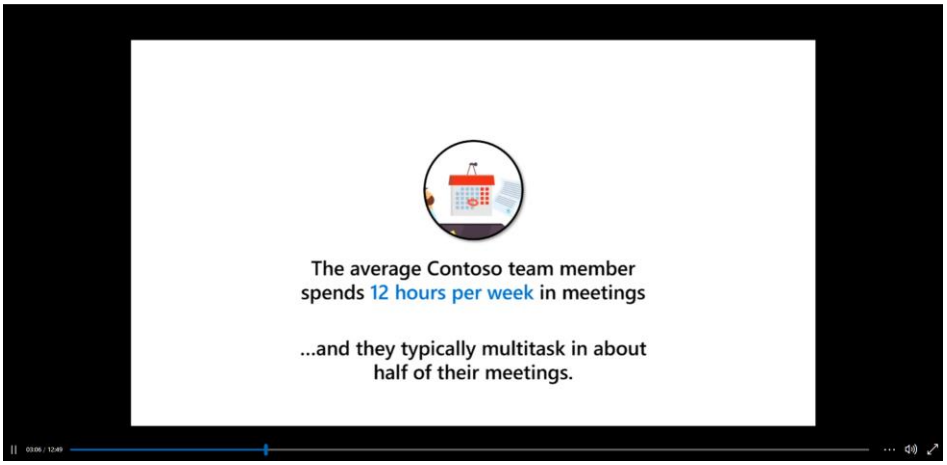
01:05 / 12:49

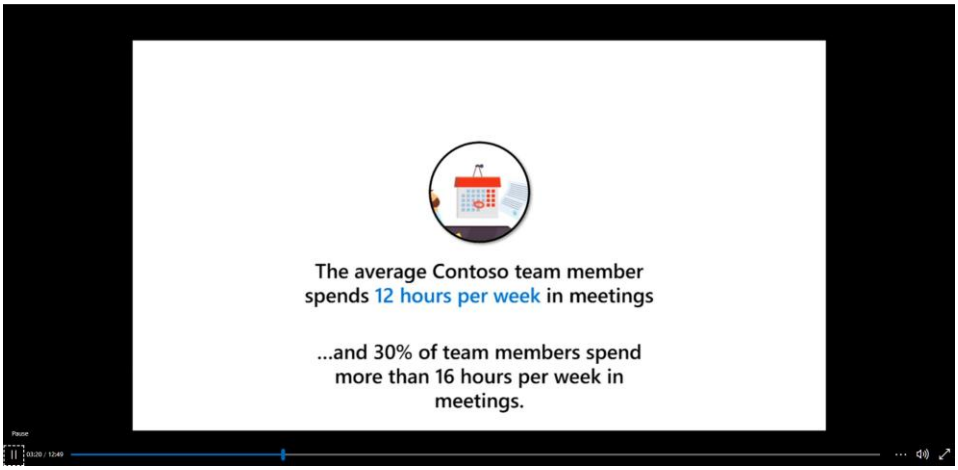


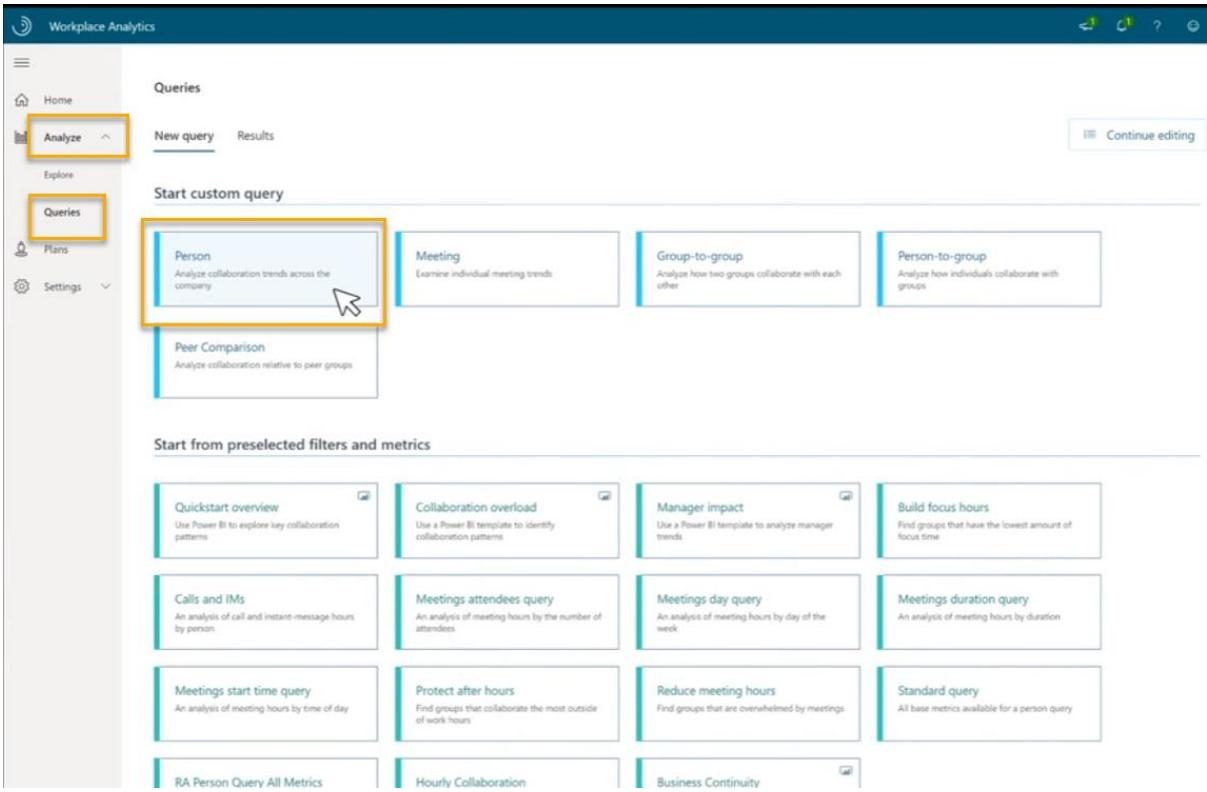


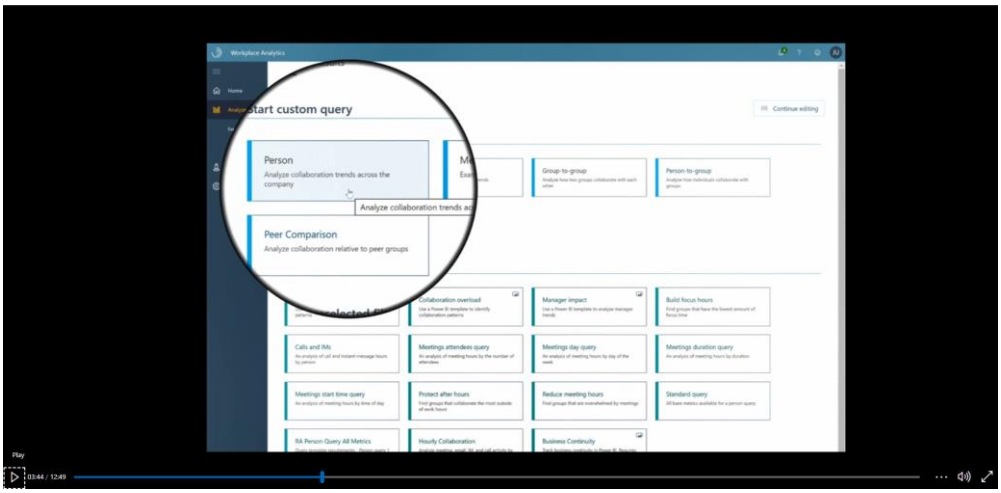
The average Contoso team member
spends 12 hours per week in meetings

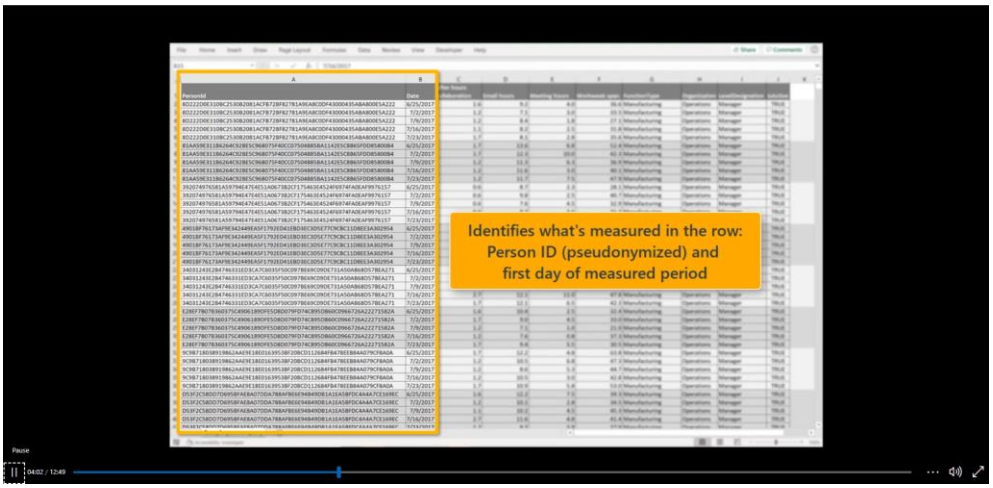

The average Contoso team member
spends 12 hours per week in meetings
Americas
8
EMEA
14
APAC
24

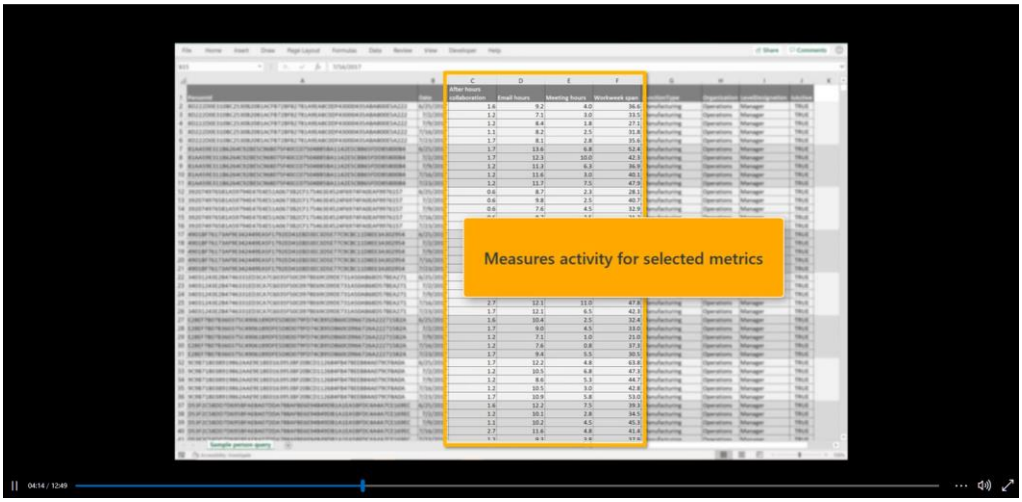

The average Contoso team member
spends 12 hours per week in meetings
...and they typically multitask in about
half of their meetings.

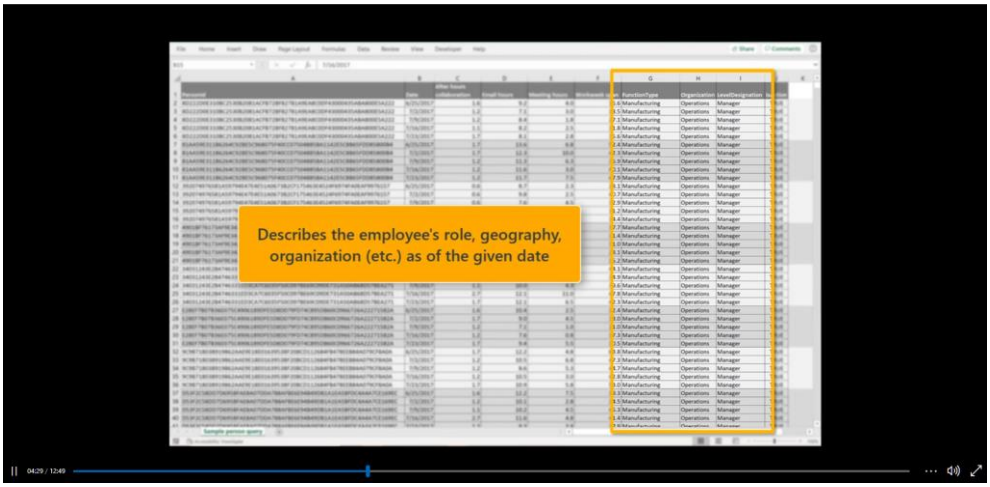

The average Contoso team member
spends 12 hours per week in meetings
...and 30% of team members spend
more than 16 hours per week in
meetings.

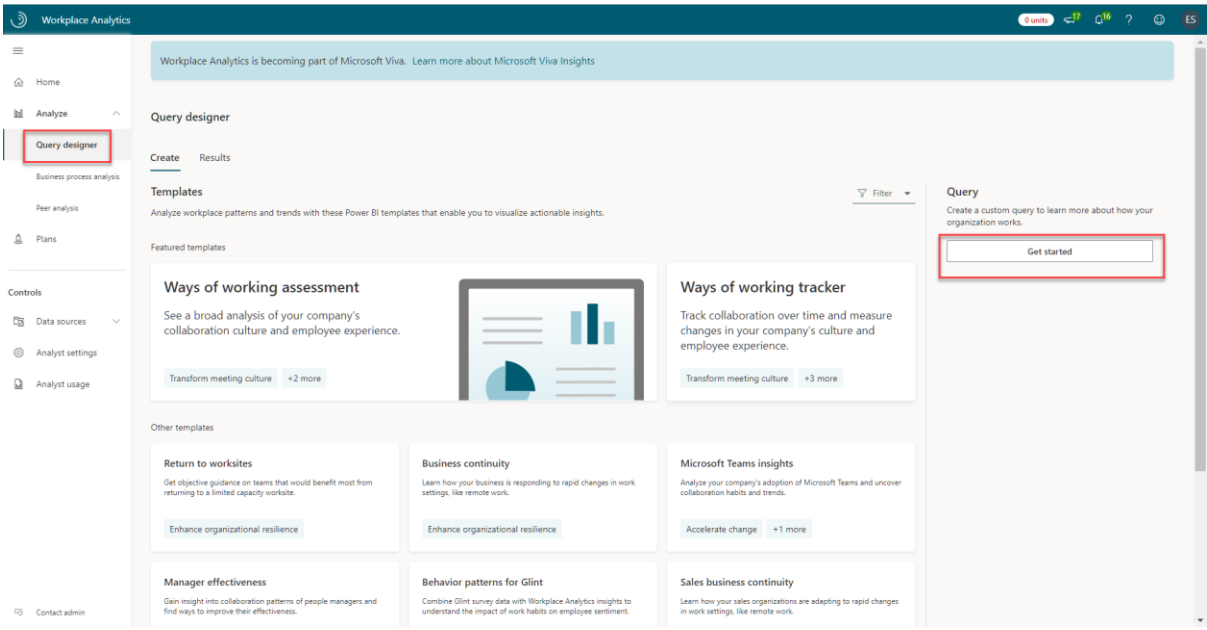

Workplace Analytics
Home
Analyze
Explore
Queries
Plans
Settings
Queries
New query
Results
Continue editing
Start custom query
Person
Analyze collaboration trends across the company
Meeting
Examine individual meeting trends
Group-to-group
Analyze how two groups collaborate with each other
Person-to-group
Analyze how individuals collaborate with groups
Peer Comparison
Analyze collaboration relative to peer groups
Start from preselected filters and metrics
Quickstart overview
Use Power BI to explore key collaboration patterns
Collaboration overload
Use a Power BI template to identify collaboration patterns
Manager impact
Use a Power BI template to analyze manager trends
Build focus hours
Find groups that have the lowest amount of focus time
Calls and IMs
An analysis of call and instant-message hours by person
Meetings attendees query
An analysis of meeting hours by the number of attendees
Meetings day query
An analysis of meeting hours by day of the week
Meetings duration query
An analysis of meeting hours by duration
Meetings start time query
An analysis of meeting hours by time of day
Protect after hours
Find groups that collaborate the most outside of work hours
Reduce meeting hours
Find groups that are overwhelmed by meetings
Standard query
All base metrics available for a person query
RA Person Query All Metrics
Hourly Collaboration
Business Continuity

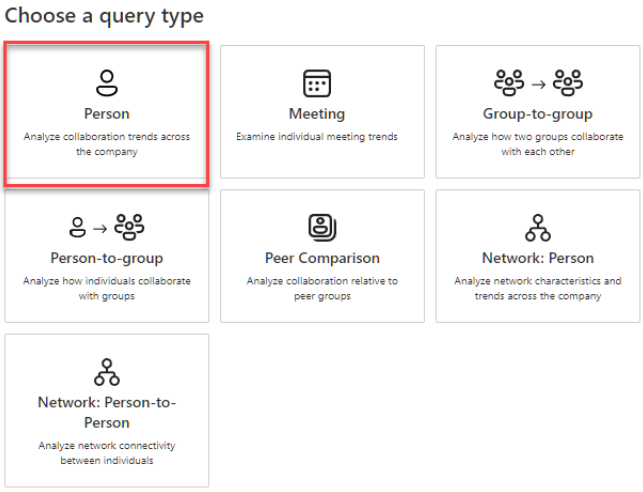

Start custom query
Person
Analyze collaboration trends across the company
Peer Comparison
Analyze collaboration relative to peer groups
Play
03:44 / 12:49

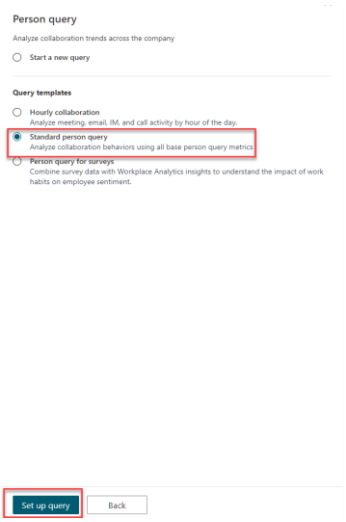

Identifies what's measured in the row: Person ID (pseudonymized) and first day of measured period
Pause
04:02 / 12:49


Measures activity for selected metrics

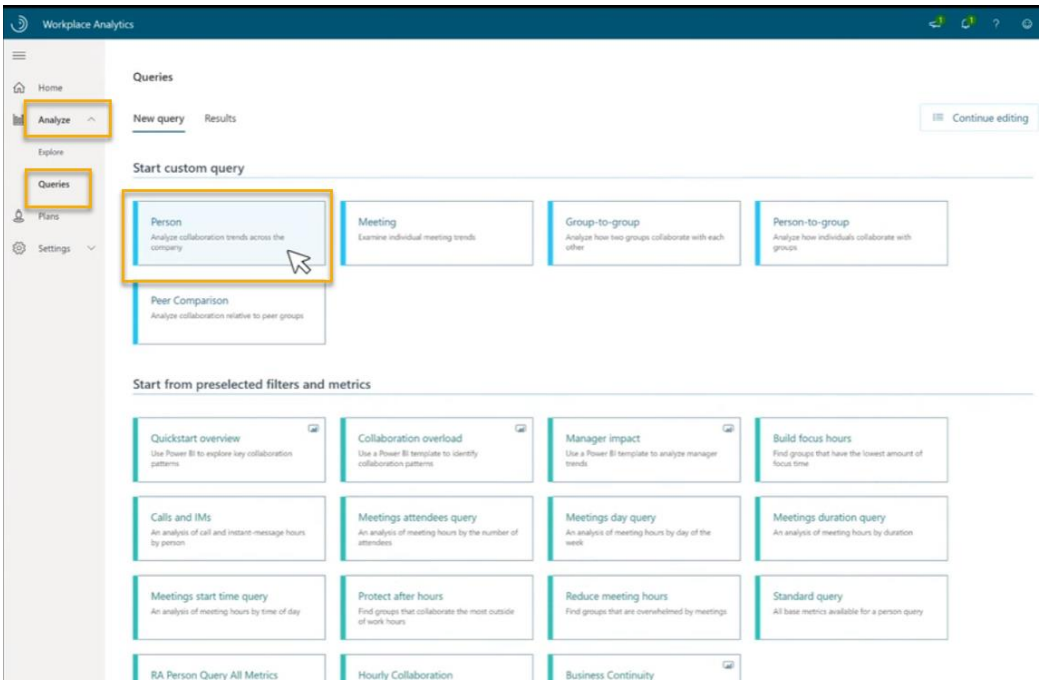

Describes the employee's role, geography, organization (etc.) as of the given date


Workplace Analytics
Workplace Analytics is becoming part of Microsoft Viva. Learn more about Microsoft Viva Insights
Home
Analyze
Query designer
Business process analysis
Peer analysis
Plans
Controls
Data sources
Analyst settings
Analyst usage
Contact admin
Query designer
Create
Results
Templates
Analyze workplace patterns and trends with these Power BI templates that enable you to visualize actionable insights.
Filter
Featured templates
Ways of working assessment
See a broad analysis of your company's collaboration culture and employee experience.
Transform meeting culture
+2 more
Ways of working tracker
Track collaboration over time and measure changes in your company's culture and employee experience.
Transform meeting culture
+3 more
Other templates
Return to worksites
Get objective guidance on teams that would benefit most from returning to a limited capacity worksite.
Enhance organizational resilience
Business continuity
Learn how your business is responding to rapid changes in work settings, like remote work.
Enhance organizational resilience
Microsoft Teams insights
Analyze your company's adoption of Microsoft Teams and uncover collaboration habits and trends.
Accelerate change
+1 more
Manager effectiveness
Gain insight into collaboration patterns of people managers and find ways to improve their effectiveness.
Behavior patterns for Glint
Combine Glint survey data with Workplace Analytics insights to understand the impact of work habits on employee sentiment.
Sales business continuity
Learn how your sales organizations are adapting to rapid changes in work settings, like remote work.
Query
Create a custom query to learn more about how your organization works.
Get started

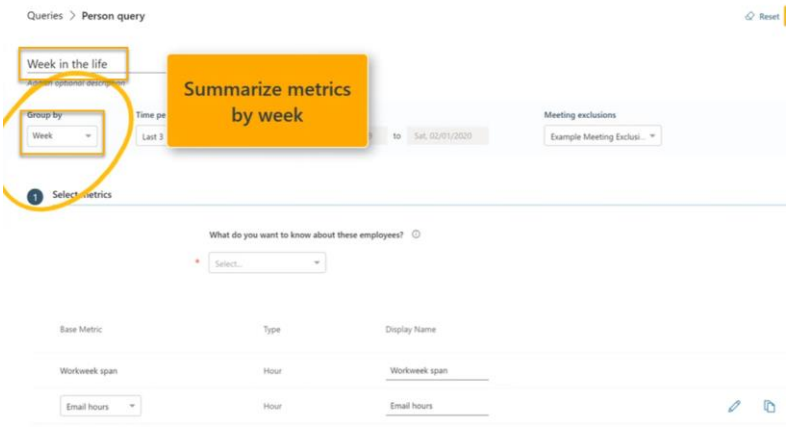

Choose a query type
Person
Analyze collaboration trends across the company
Meeting
Examine individual meeting trends
Group-to-group
Analyze how two groups collaborate with each other
Person-to-group
Analyze how individuals collaborate with groups
Peer Comparison
Analyze collaboration relative to peer groups
Network: Person
Analyze network characteristics and trends across the company
Network: Person-to-Person
Analyze network connectivity between individuals
Not sure which one to choose? Learn more


Person query
Analyze collaboration trends across the company
Start a new query
Query templates
Hourly collaboration
Analyze meeting, email, IM, and call activity by hour of the day.
Standard person query
Analyze collaboration behaviors using all base person query metrics
Person query for surveys
Combine survey data with Workplace Analytics insights to understand the impact of work habits on employee sentiment.
Set up query
Back

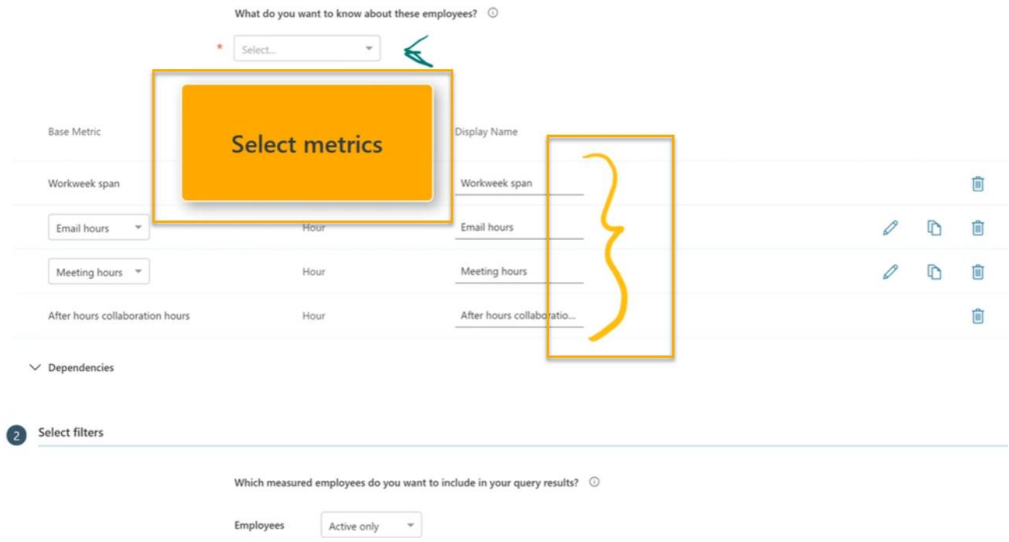
-


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All base metrics available for a person query
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Business Continuity

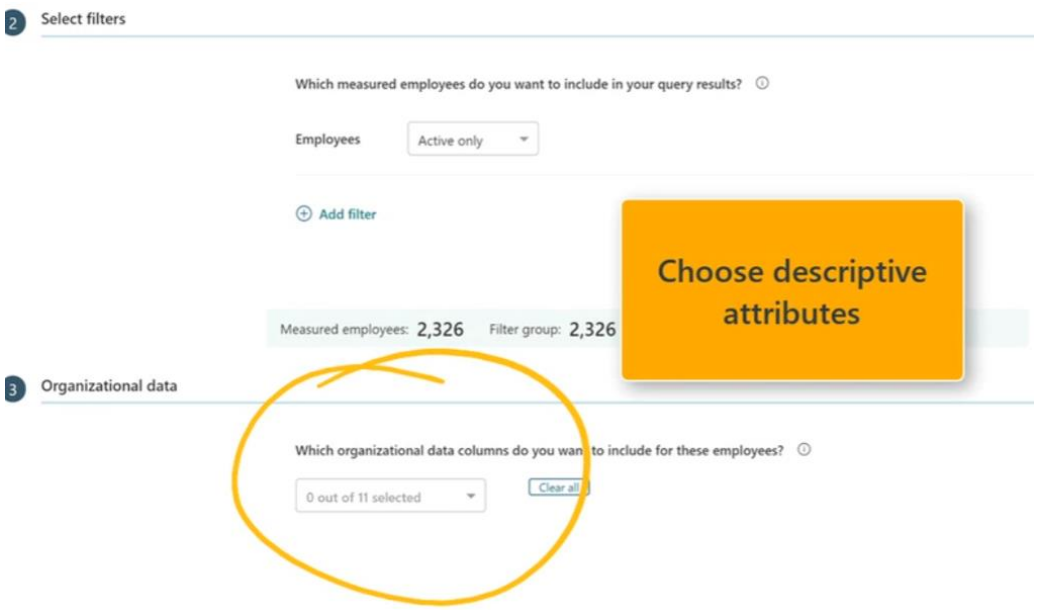
1. **By Week**



2. **Select Metrics**

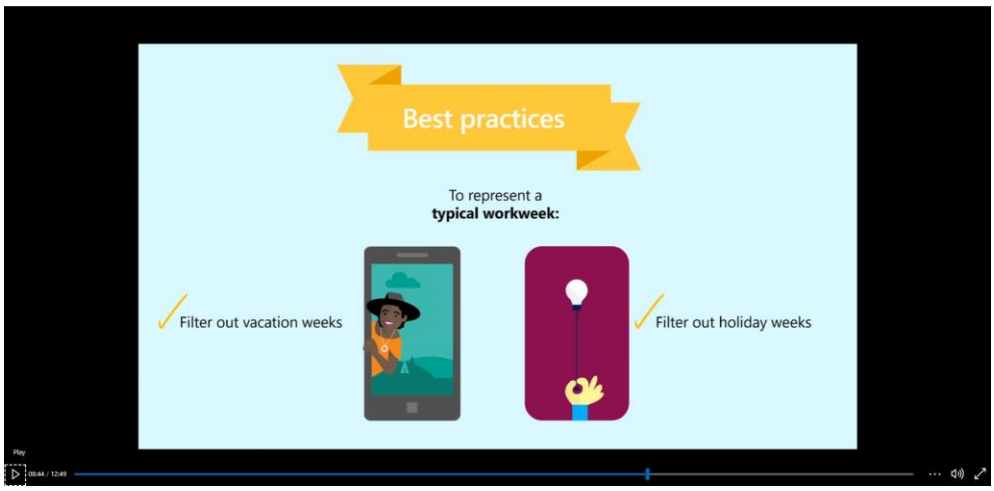


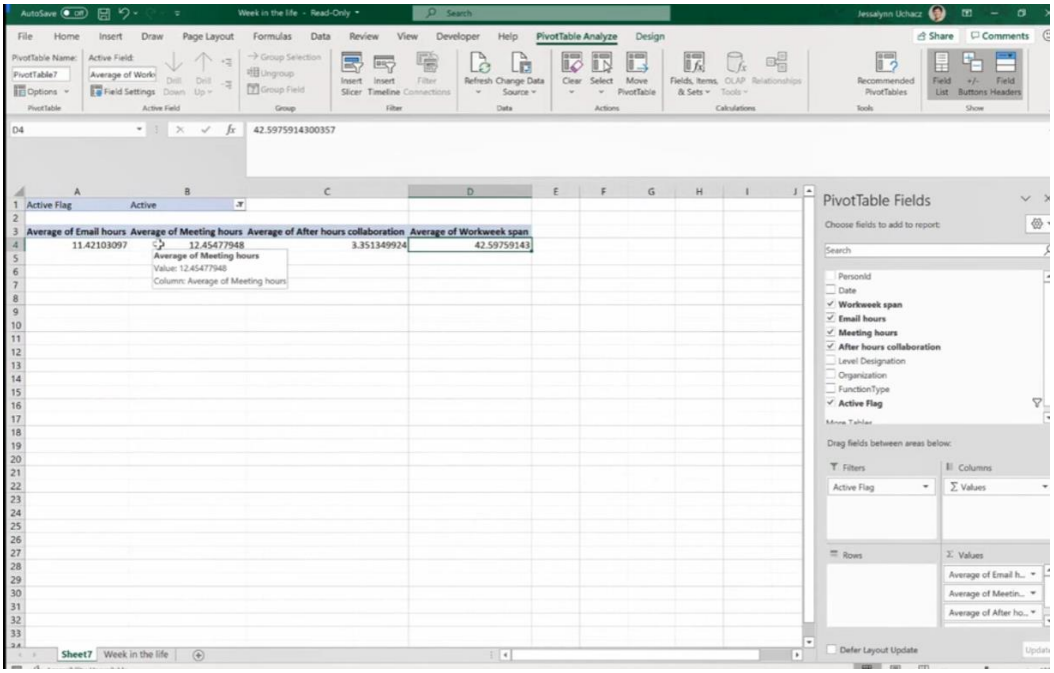
3. Choose descriptive attributes

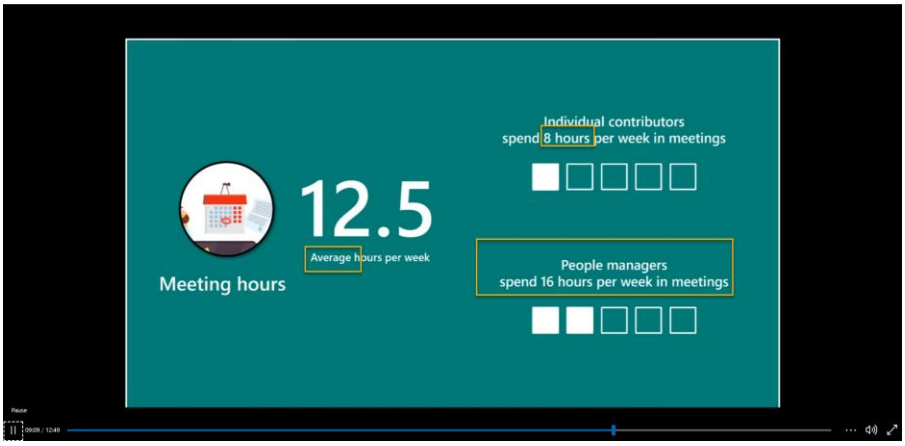


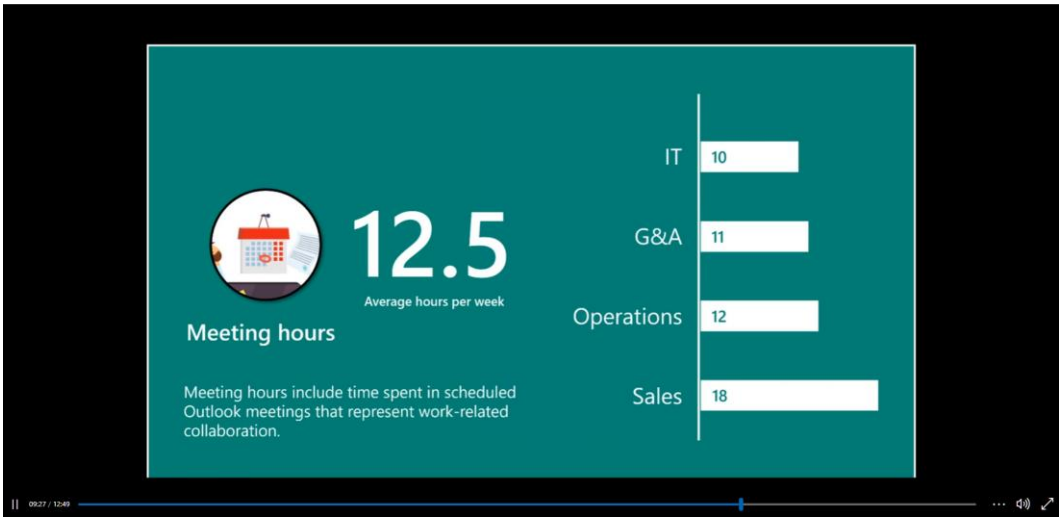
- Best practise

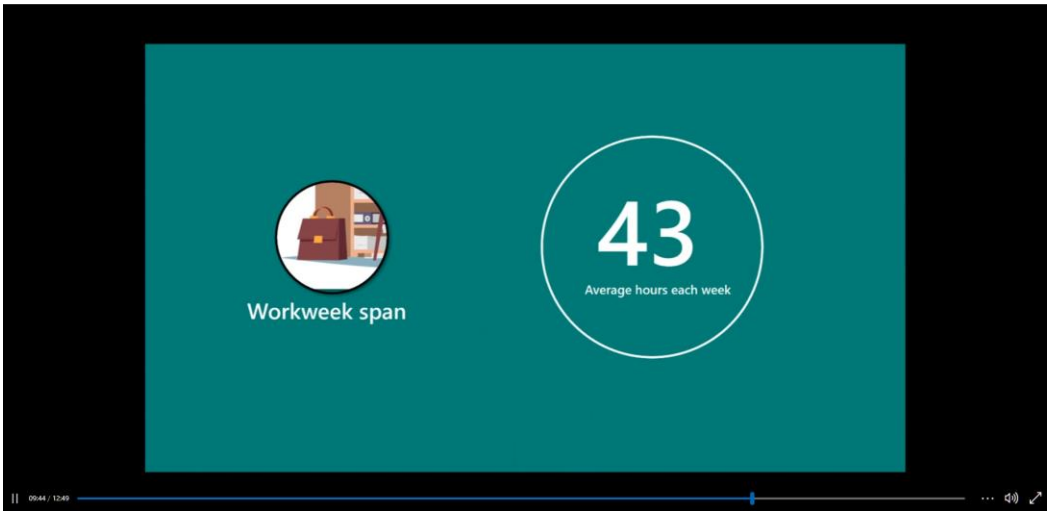
1. represent typical workweek

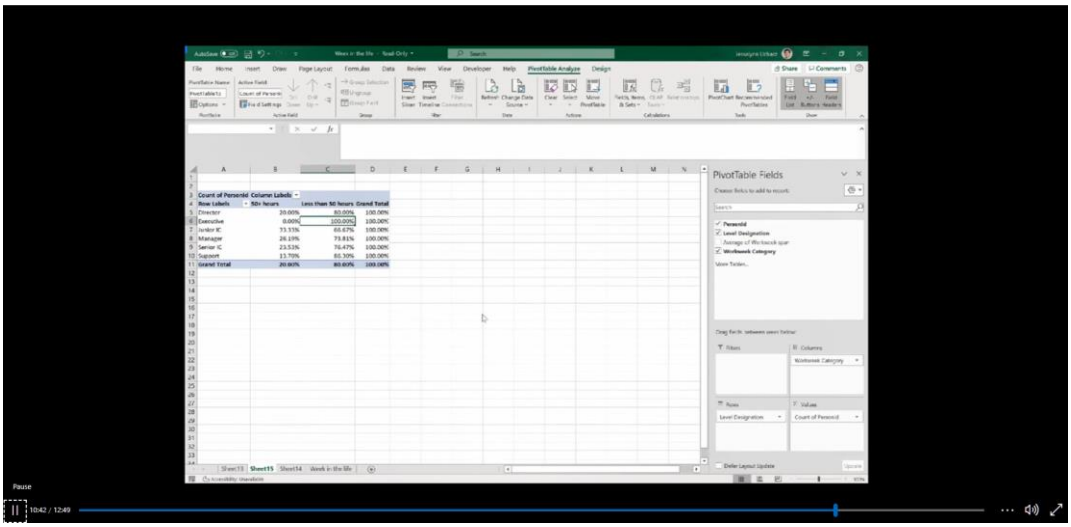


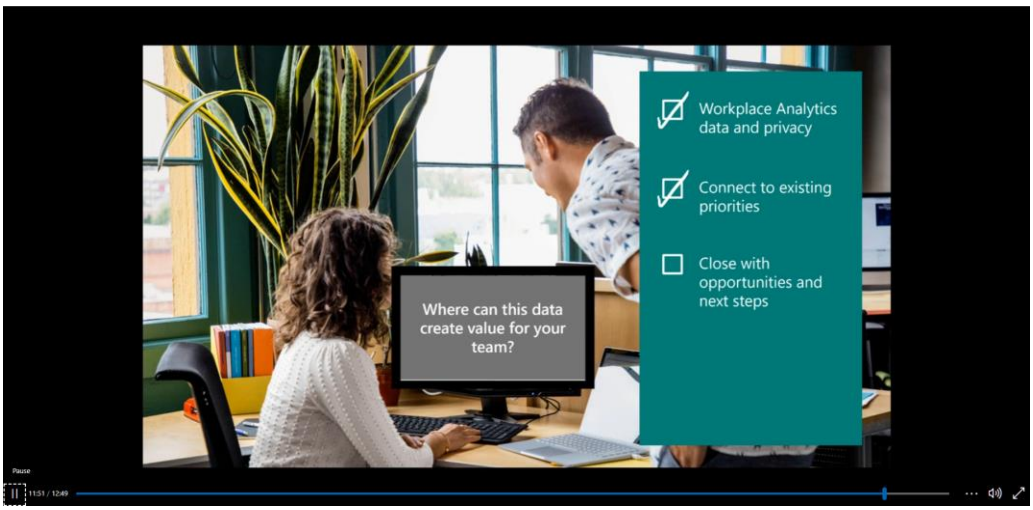

Active Flag
Active
Average of Email hours
Average of Meeting hours
Average of After hours collaboration
Average of Workweek span
11.42103097
12.45477948
3.351349924
42.59759143
PivotTable Fields
Sheet7
Week in the life


Individual contributors
spend 8 hours per week in meetings
12.5
Average hours per week
Meeting hours
People managers
spend 16 hours per week in meetings


12.5
Average hours per week
Meeting hours
Meeting hours include time spent in scheduled Outlook meetings that represent work-related collaboration.
IT
10
G&A
11
Operations
12
Sales
18


Workweek span
43
Average hours each week
09:44 / 12:49


PivotTable Fields
Pause
10:42 / 12:49


Workplace Analytics data and privacy
Connect to existing priorities
Close with opportunities and next steps
Where can this data create value for your team?
Pause
11:51 / 12:49

Start simple and add complexity gradually

Pause frequently to ask and answer questions

Learn what is important to your stakeholder

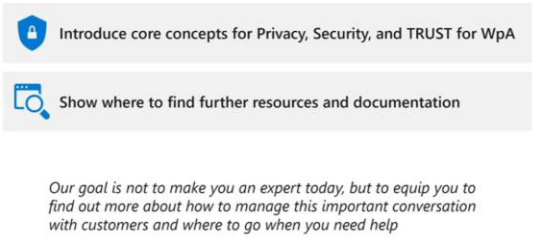
- **Filter out holidays**
- **Low meeting and email hours.**

2. Watch the Privacy and Security video (29 min) [1]

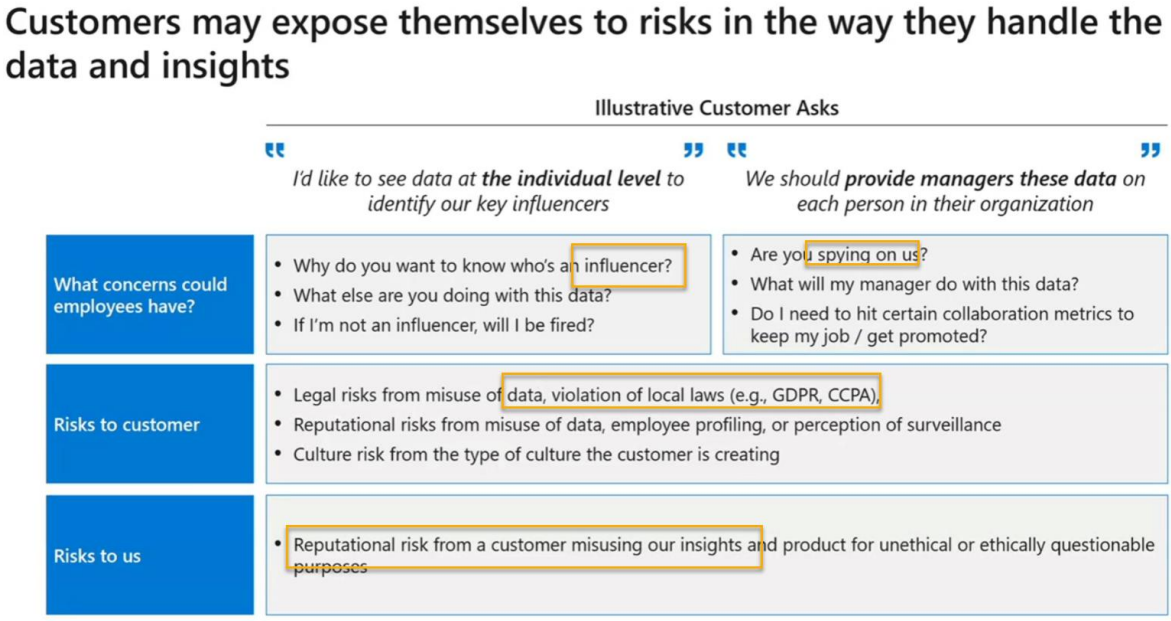
4. Privacy and Security

Workplace Analytics

Objectives



How data is used?



resources

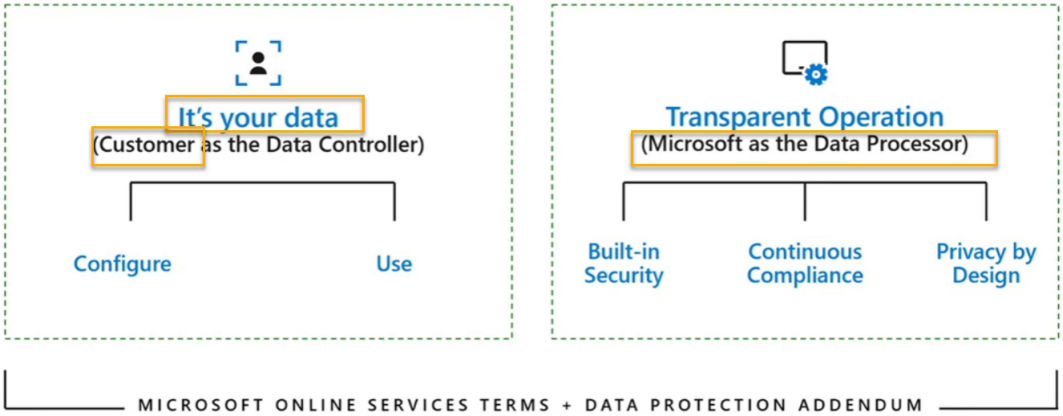
This training is only the start - refer to these resources for the answe TRUST and privacy questions

Resource	Description	Location
WpA TRUST Site	Internal site for TRUST and privacy resources	http://aka.ms/wpatrust
Microsoft Online Services Terms (OST)	Contract governing all Microsoft Online Services	http://aka.ms/ost
Microsoft OST Data Protection Addendum	Microsoft responsibilities	http://aka.ms/dpa
OnRamp	Site for customer-facing resources	http://aka.ms/onramp
Product documentation	How WpA works	Link
WpA Privacy & Security deck	Details of how WpA is configured to protect privacy and security	http://aka.ms/wpatrust
WpA TRUST deck	Framework for conversing on TRUST and WpA implementation	http://aka.ms/wpatrust
WpA TRUST Bot	Chatbot to answer questions and path for escalation	http://aka.ms/wpatrust

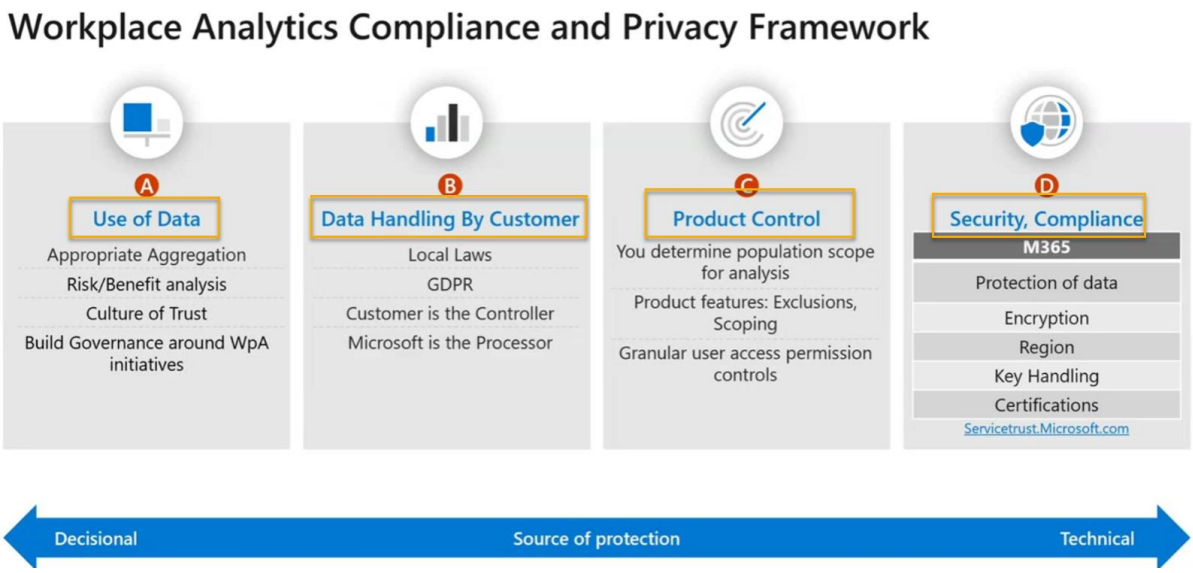
Earing trust is a shared responsibility

- Customer as the **Data Controller**
- Microsoft as the **Data Processor**
    - Built-in Security
    - Continuous Compliance
    - Privacy by design

Earning Trust is a shared responsibility

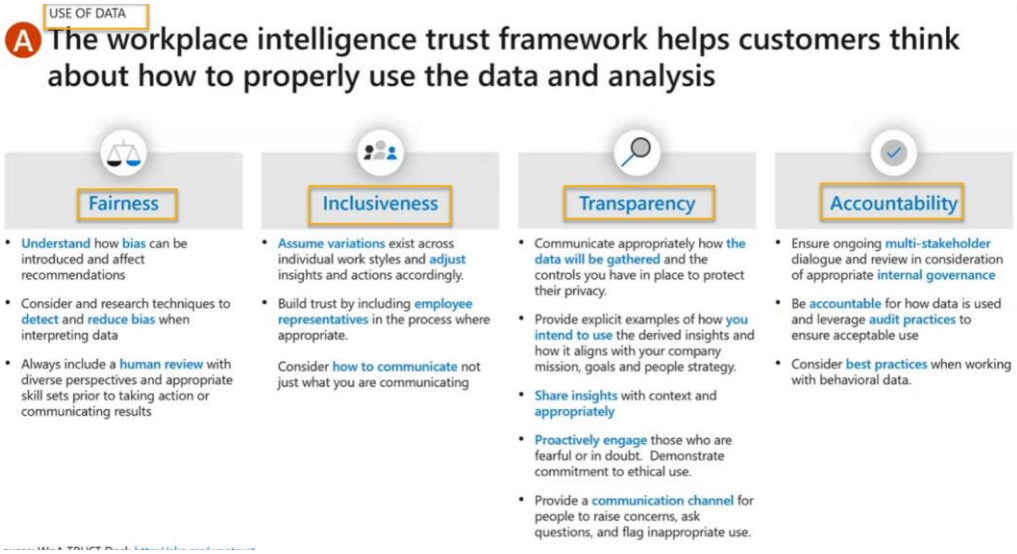


WpA Compliance and privacy framework



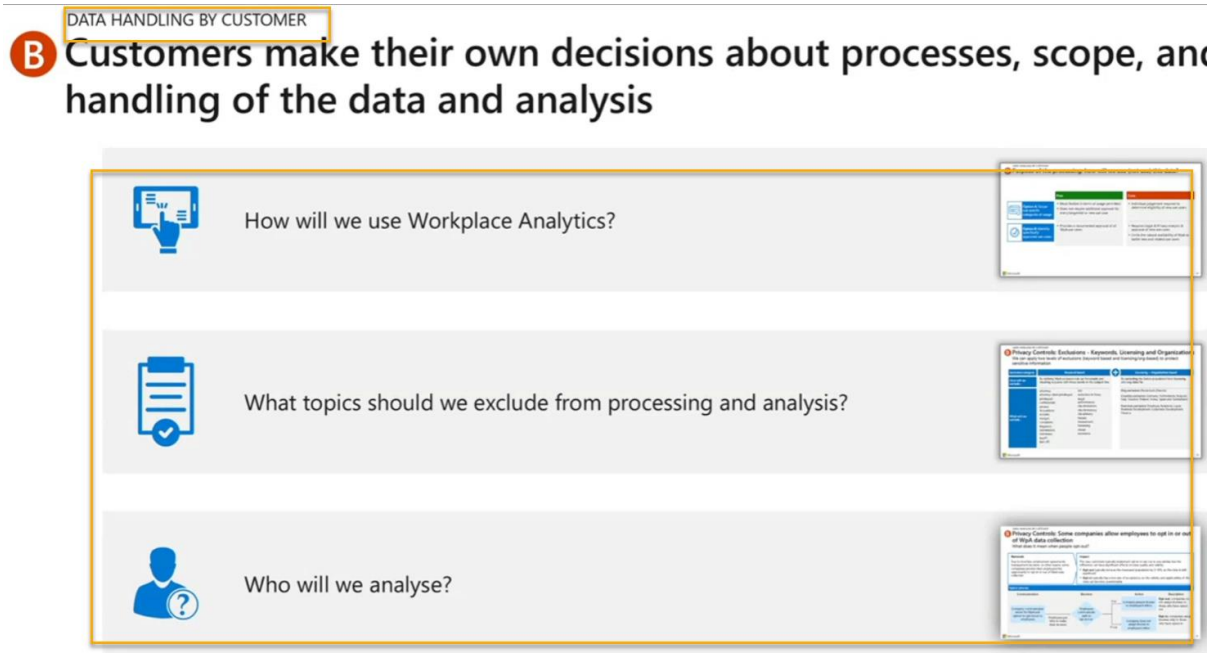
1. Use of data Control

- Fairness
- Inclusiveness
- Transparency
- Accountability



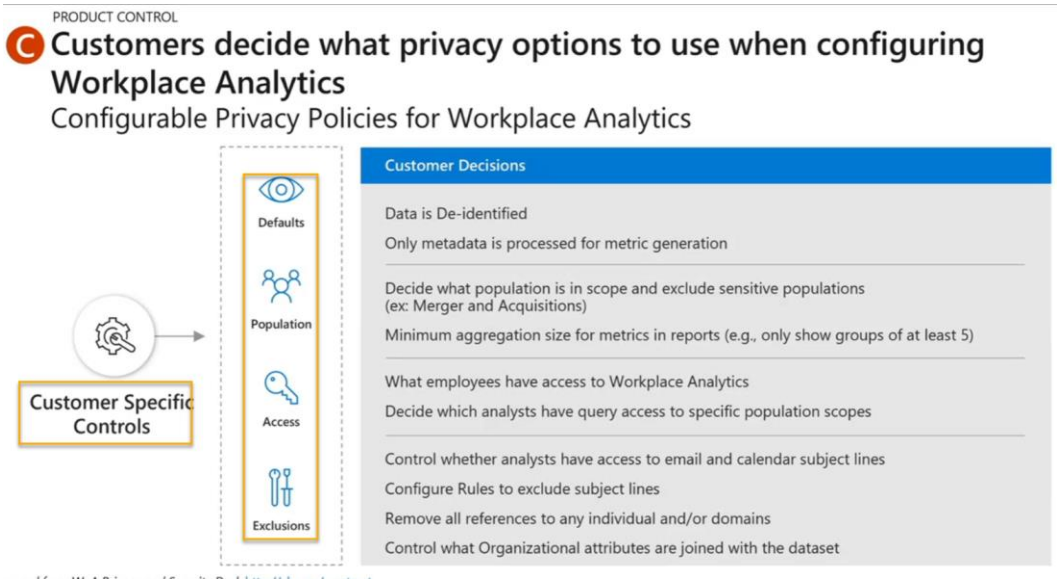
2 Data handling by customer

- Local laws
- GDPR
- Customer is the controller
- Microsoft is the processor

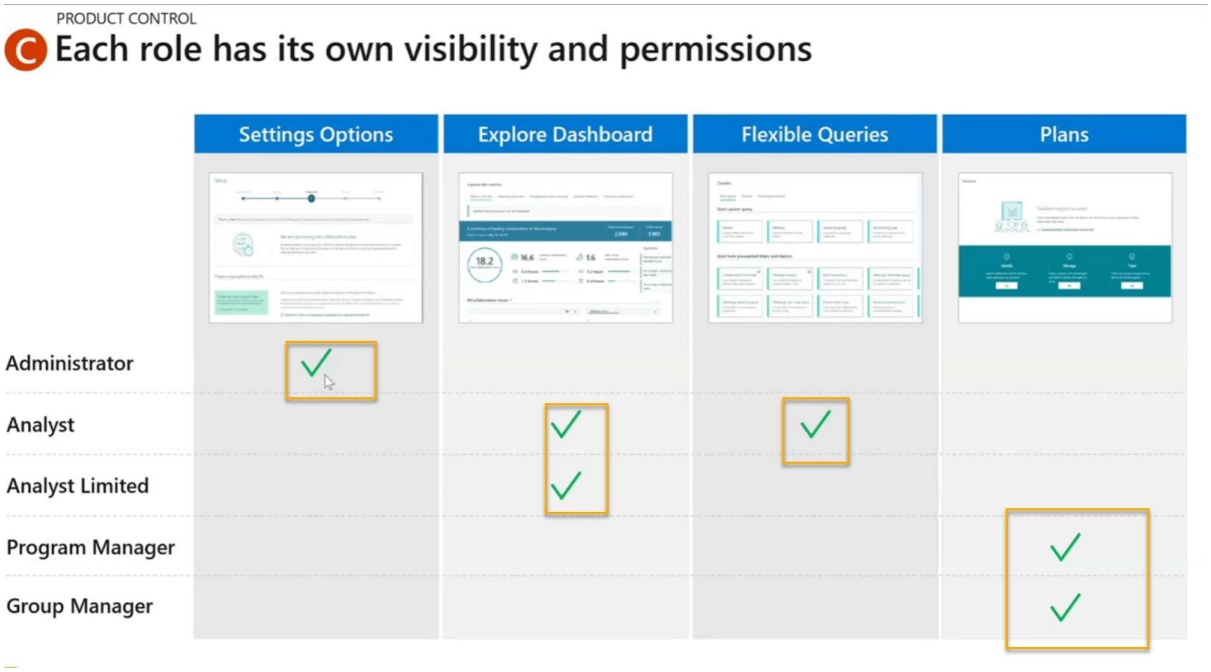


3. Product Control

- Define **population scope**
- Usage of **exclusions**
- Granular user access **permission**
- Data is de-identified
- Only **metadata is processed** for metric generation



Matrix (visibility and permissions)



5. Security

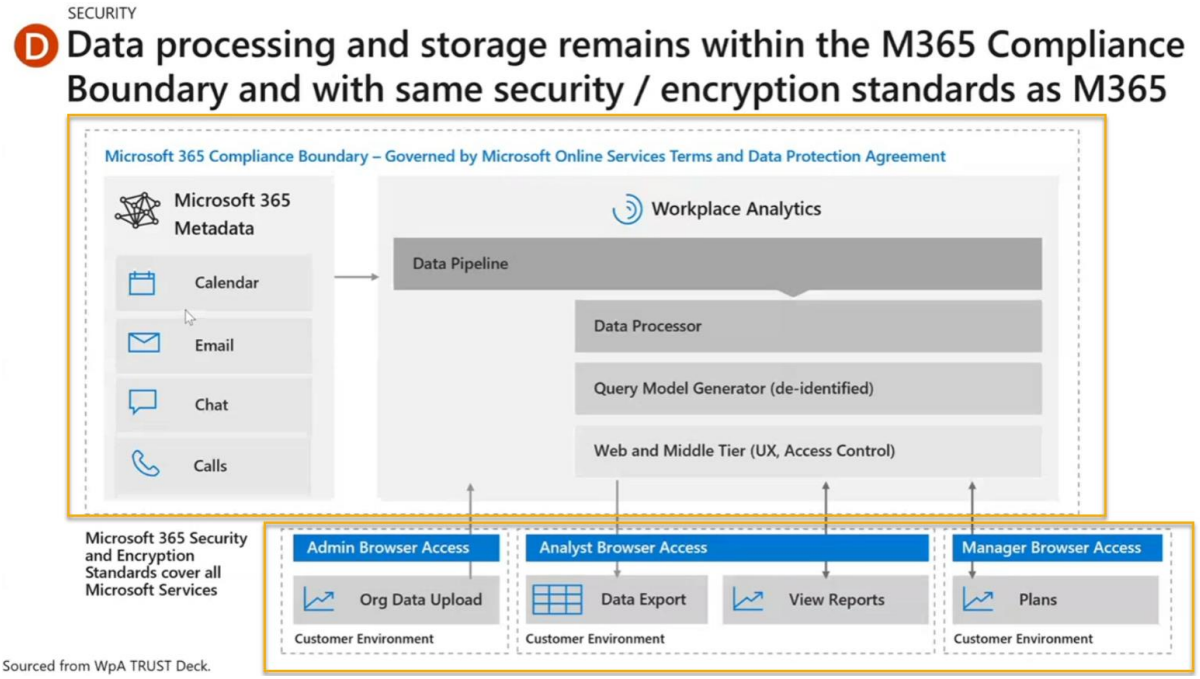
M365 Metadata

- Calendar
- Email
- Chat
- Calls

Workplace Analytics

- Data Pipeline
    - Data Processor
    - Query Model Generator (de-identified)
    - Web and middle tier (UX, Access Control)
- Admin Browser Access (Org Data Upload - Customer Environment)
- Analyst Browser Access (Data Export, View Reports - Customer Environment)
- Manager Browser Access (Plans - Customer Environment)

M365 Security and Encryption standard cover Microsoft Services



Module 2: Ways of Working Assessment 90 minutes of video, and 30 minutes of exercises)

Complete Ways of working assessment module (Microsoft Learn)

Analyze collaboration and engagement using the Ways of working assessment dashboard in Power BI

Learn to evaluate collaboration culture and employee experience with a Power BI template by using Viva Insights data through Workplace Analytics.

Learning objectives

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

- Explain what the **Ways of working assessment dashboard** in **Power BI** is, and why it provides an **important perspective**.
- Use the **Query designer** for the template setup, and then **load the data** and select the **dashboard settings** in Power BI.
- **Interpret the results** from multiple reports in the dashboard.

Prerequisites

- Familiarity with **Workplace Analytics data sources** in Microsoft Viva Insights
- **Basic knowledge** of Microsoft Power BI software
- **Basic knowledge** of the Query designer and query results

Introduction

Completed100 XP

- 5 minutes
- The Ways of working assessment dashboard in Power BI uses a Power Business Intelligence (BI) template that's populated with **Viva Insights** through **Workplace Analytics data**.
- You use this behavioural data to **gain insights** into **how employees collaborate** in an organization.

  This **dashboard directionally highlights collaboration patterns** for **different levels** and **groups**, offering a **starting point** for **identifying opportunities** to **streamline collaboration** and improve the **employee experience**.

- **Scenario**

  Imagine you are an **HR people analytics manager**. Your **Chief Human Resources Officer (CHRO)** is overseeing some initiatives designed to **streamline ways of working, reduce burnout risk and boost manager effectiveness**.

- The initiatives will require continuously **piloting interventions, measuring their impact**, and refining execution as they **roll out across the company**. To date, information about your **company's working styles** has come primarily from **employee surveys**, which, while **valuable**, are **subject to completion bias** and not conducive to tracking real-time change.

- To bridge **that gap with objective, dynamic metrics**, you set up the **Ways of working assessment template** and **dashboard** – providing your **CHRO** with a data-driven baseline about **employee working patterns** and **manager practices**, which enables the **leadership team to identify opportunities** and measure the impact of their initiatives.

Learning objectives

In this module, you'll learn to:

- Explain what the **Ways of working assessment dashboard** in **Power BI** is, and why it provides an important perspective.
- Use the **Query designer** template to **run the queries**, **load the data**, and select your **settings**.
- **Interpret the results** from multiple reports in the dashboard.

Prerequisites

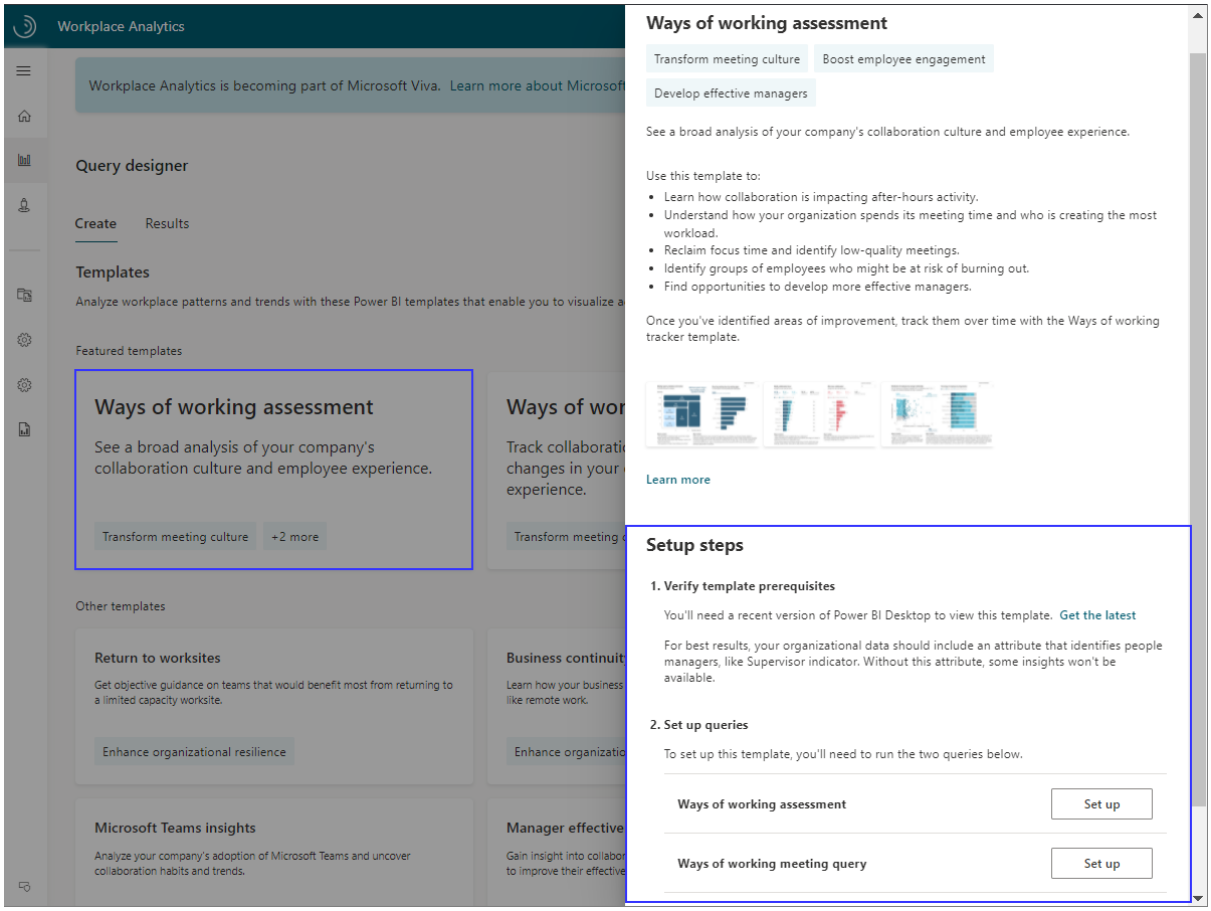
- Familiarity with the Workplace Analytics data sources in Viva Insights
- Basic knowledge of Microsoft Power BI software
- Basic knowledge of the Query designer and query structure

Prepare the Ways of working assessment dashboard

Completed100 XP

- 8 minutes

The Ways of **working assessment dashboard** uses a prebuilt Power BI template **populated by output (OData)** from the **Ways of working assessment** and **Ways of working meeting** queries available through the **Query designer** template setup steps.



To set up the dashboard:

1. **Set up the template**.
2. **Download the template** and load **the query output**.
3. Select the **dashboard settings**.

After the data is loaded, the dashboard reports will generate automatically in Power BI, resulting in multiple pages of organizational insights, called reports. These reports give a broad, diagnostic view of collaboration in your organization.

1. Set up the template. In **Query designer**, select the template and follow the on-screen instructions to set it up.

Important

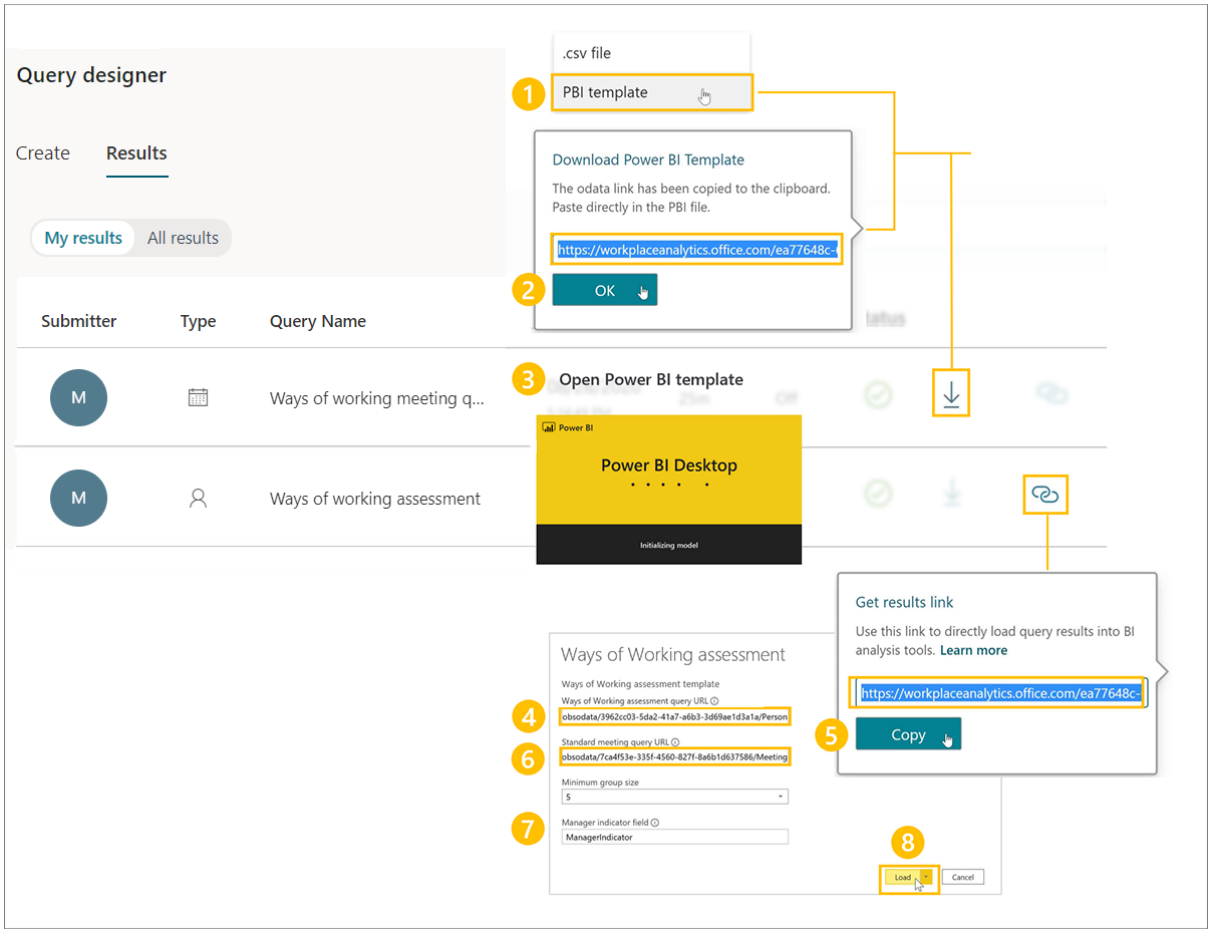
Be sure to **download** and **install** the most recent version of **Microsoft Power BI desktop** to avoid any issues with setting up and loading data into the dashboard.

For each query, give it a **descriptive name and select your date range** and exclusions. Use the same date range and filters for both queries. To create a report that updates weekly, select **Auto-refresh** for each query.

Tips when running the queries:

- For best results, select the **Last 6 months** or **Last 3 months** for the time period to see a diagnostic view of recent behaviour.
- In **Select metrics**, keep all preselected metrics. Do not delete any of these metrics. The dashboard uses them to create the **charts**, **graphs**, and **insights** in the reports.
- In **Select filters**, you can optionally filter by organizational data attributes to further refine the population.
- If you're filtering for a subset of the population, you'll need to use the same metrics and filters in both queries. For example, if you want to only view collaboration activity for Human Resources, for each metric in each query, you'd select the **Edit** (pencil) icon and filter by **Organization = Human Resources**.
- For the Ways of working assessment query, in **Select Organizational attributes**, leave the default attributes (Organization, LevelDesignation) selected. Then locate and select the attribute that identifies **people managers** (if you cannot find a manager indicator field in the menu, contact your Workplace Analytics Admin to confirm it's availability). Optionally, select additional attributes you'd like to include in the reports.
- For the Standard meeting query, in **Select Organizational attributes**, leave the default attributes (IsRecurring, Subject, and DurationHours) selected. Don't delete these attributes as they're needed for the meeting-related charts and graphs in the reports.

2. Download the template and load the query data. After the queries successfully run, in **Query designer** > **Results**, copy the OData URL for the Ways of working assessment query results.



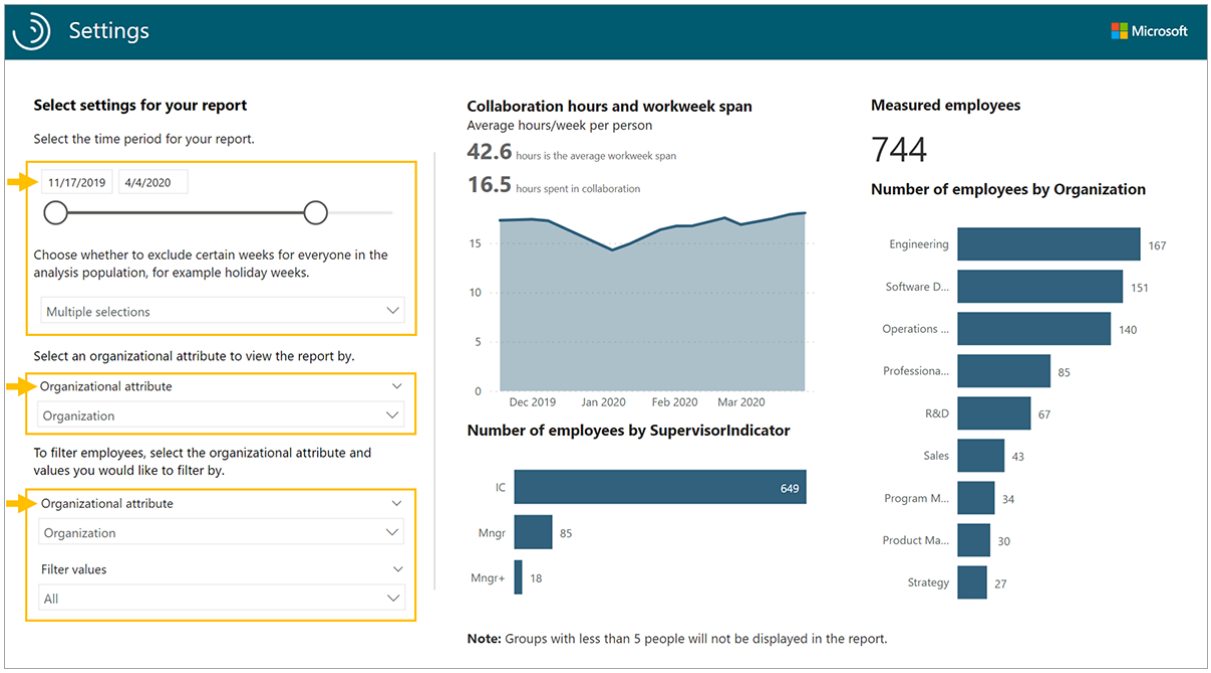
To download the template and load the data into the Power BI dashboard:

1. In **Query designer** > **My results**, download the template from the **Ways of working assessment** query result.
2. When prompted to copy the OData link, select **OK**.
3. Open the downloaded **Power BI template**.
4. When prompted by Power BI, paste the OData link in the **Ways of working assessment Query URL** field.
5. In **Query designer** > **My results**, copy the OData link for the **Ways of working meeting query** result.
6. In Power BI, paste the OData link in the **Ways of working meeting query URL** field.
7. Enter the name of the supervisor indicator field you selected when running the Ways of working assessment query.
8. Select **Load** to load the data.

The dashboard visualizations on each page of the report populate with Workplace Analytics data.

3. Select the dashboard settings. After the data is loaded and the report is generated, you'll see Settings in the dashboard, where you can confirm and change the dashboard settings for your analysis.++9

- Select the **time period** for your report and choose whether to exclude certain weeks from the results, such as holiday weeks.
- Select an **organizational attribute** to view the report by.
- Filter to your population of interest (if needed) along any organizational attribute.



After confirming the settings for the population you want to analyze, you can start using the dashboard. This dashboard includes reports about total collaboration, after-hours work, meeting culture, multitasking behaviours, manager relationships, and more.

See the documentation link in Learn more for template updates, setup instructions, tips on sharing the dashboard, FAQs, and troubleshooting.

Learn more

Ways of working assessment dashboard

Assess collaboration culture and employee experience

Completed100 XP

- 10 minutes

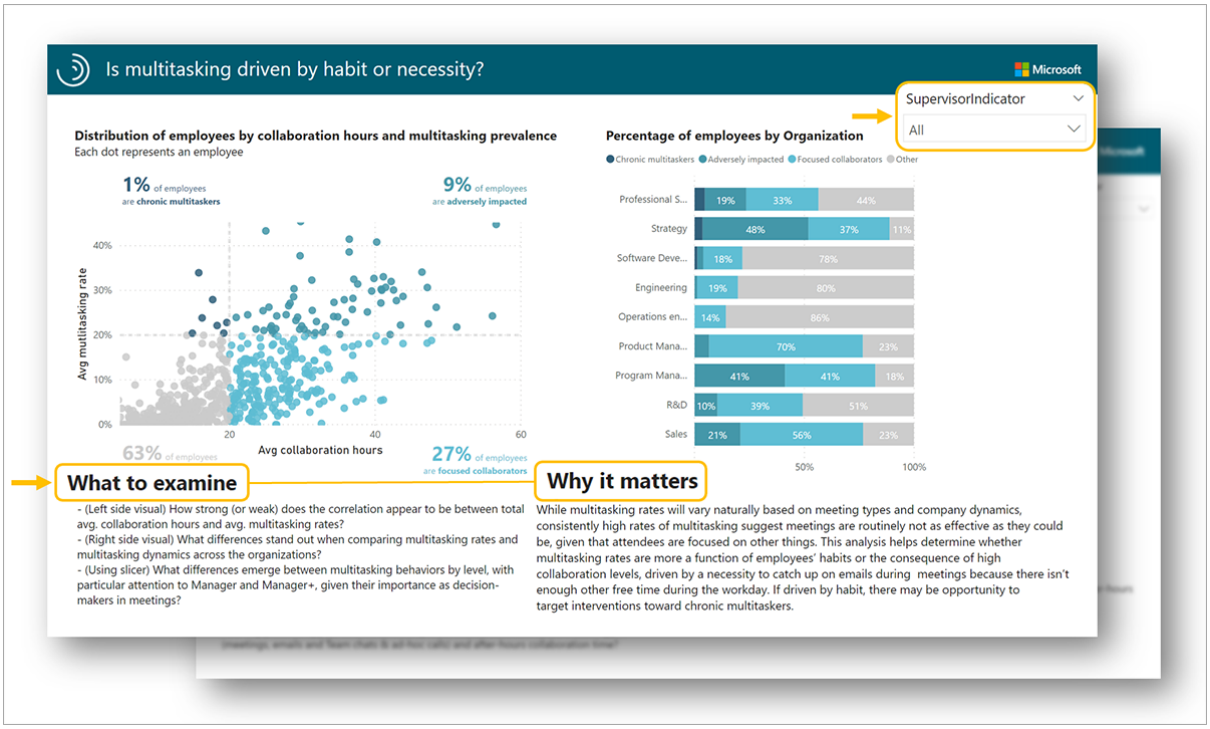
The **Ways of working assessment dashboard** in **Power BI provides a quick and easy way** to conduct a broad diagnostic about *Collaboration culture* and *Employee experience*.

So how does it work?

Each report page provides views into **one of the themes laid out** on the introduction page. Dynamic filtering and embedded guidance let users **uncover useful** insights quickly:

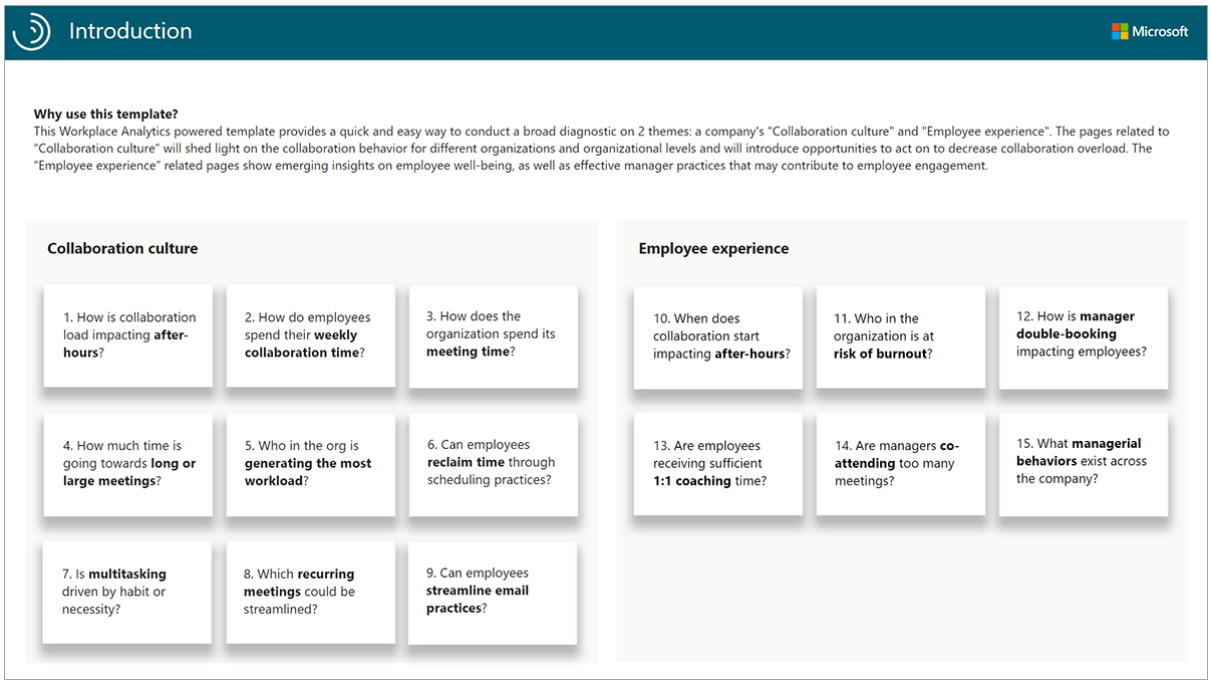
- **Data filtering** by **managerial level** and **organization** enables analysts to d**rill down to root drivers** of collaboration behaviours.

- **Embedded analysis guidance** within each page helps users to systematically identify the most significant insights.
- **Broader contextual guidance** within each page helps users ground their findings in business context.



The Introduction page

The Introduction page of the report helps create the context around what questions the **Ways of working Assessment** will address, and **why it matters**.



The Introduction page sets the stage for dashboard recipients who are unfamiliar with insights generated from Workplace Analytics.

The pages related to ***Collaboration culture*** will shed light on **employee collaboration practices**, **including email** and **meeting behaviour**. The ***Employee experience*** pages show insights on employee wellbeing, including time spent **after hours** and **employee-manager relationships**.

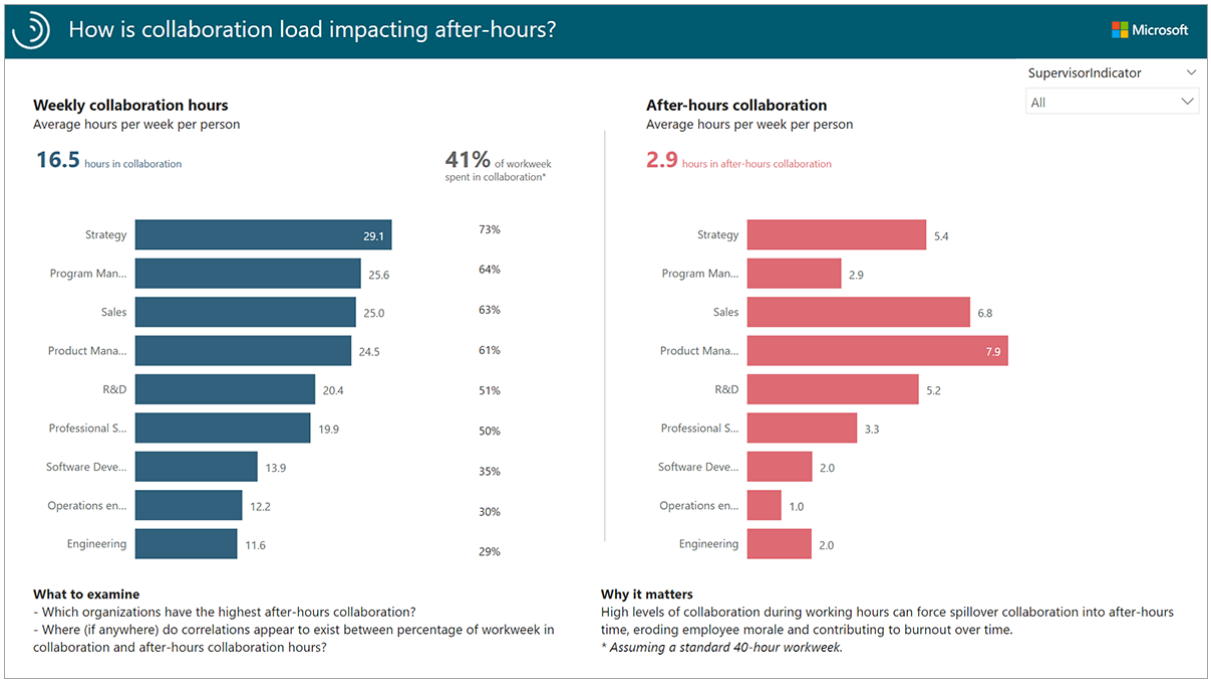
Report: How is collaboration load impacting after hours?

The ***Collaboration & after-hours*** report helps you uncover how much time each team spends **collaborating outside working hours**. It shows how after-hours time differs by level.

- The **metrics across the top of the page** display the **average weekly hours** spent in collaboration during the analyzed time period.
- The chart on the **left** displays the **average weekly collaboration hours** for each Organization.
- The chart on the **right** displays the **average weekly after-hours collaboration** hours for each Organization.
- For example, employees in the **Strategy team spend** about **73% of their workweek** in collaboration. It also looks like a **significant chunk of that collaboration**, 5.4 hours, is being pushed into after hours.

Note

The percentage of workweek spent in collaboration is calculated using a standard 40-hour workweek.



Tip

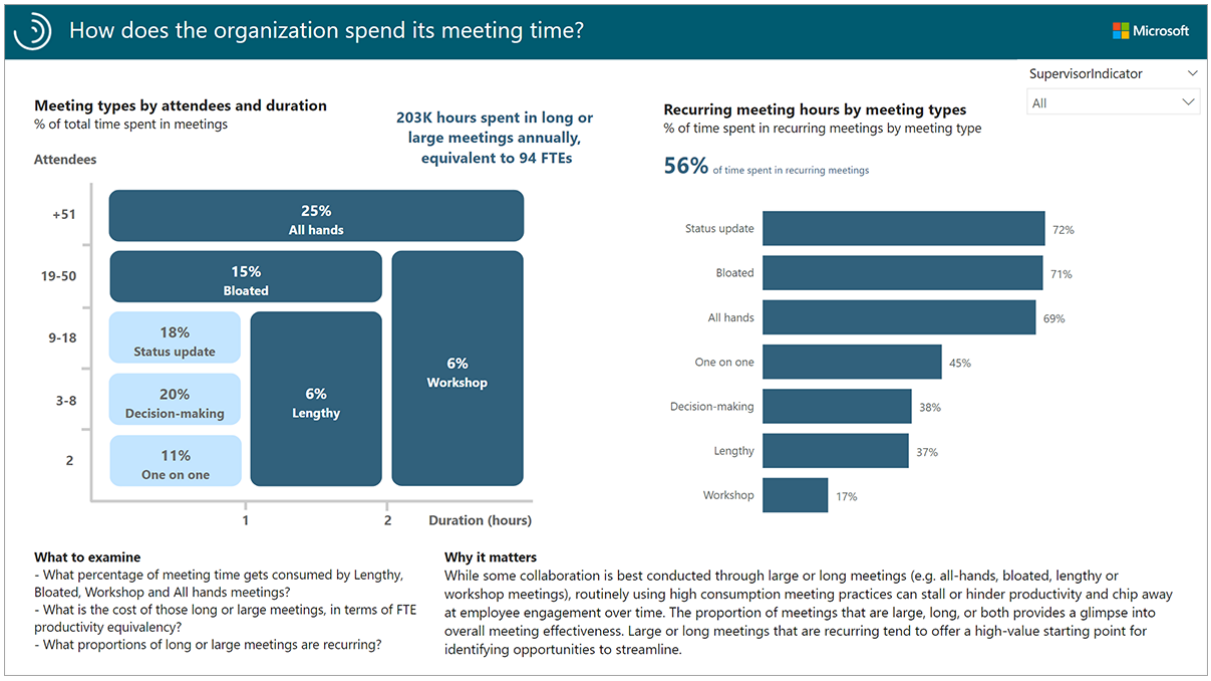
Use the drop-down menu in the top-right corner to filter by managerial level.

High levels of collaboration coupled with high after-hours collaboration can indicate opportunities to make collaboration more efficient in the organization. The *Collaboration & after-hours* report helps you identify groups of employees who may need to **improve meeting practices and streamline communication.**

Report: How does the organization spend its meeting time?

The *Meeting culture* report gives insight into *how an organization spends time in meetings* by breaking them down into categories defined by **meeting size and duration**. This report shows how much meeting time is **consumed by large and/or long meetings** as well as what proportion of the most "**expensive**" meetings (in terms of attendee hours) are recurring.

- The chart on the left shows the percentage of **total meeting hours spent** in each meeting type. Meeting types include
    - All hands,
    - Bloated,
    - Lengthy and
    - Workshop meetings and are created using the **number of attendees and duration**.
- Above and to the right of the meeting type chart, the report shows the **total number of hours spent in long** or **large meetings annually**, and for comparison, the **number of equivalent full-time employees** (FTEs) that would work the same number of hours.
- The chart on the right shows the **percentage of recurring meeting hours** for each meeting type by group.



Too much time in long and/or **large meetings** can **signal** an opportunity to **make meetings more efficient and effective.** Meetings that are longer than one hour can make it difficult for attendees to maintain focus, and meetings with too many attendees can make it difficult to make decisions.

The *Meeting culture* report allows you to identify and quantify pockets of large and long meetings. Recurring large and long meetings offer a high value starting point to improve meeting culture and reduce collaboration overload.

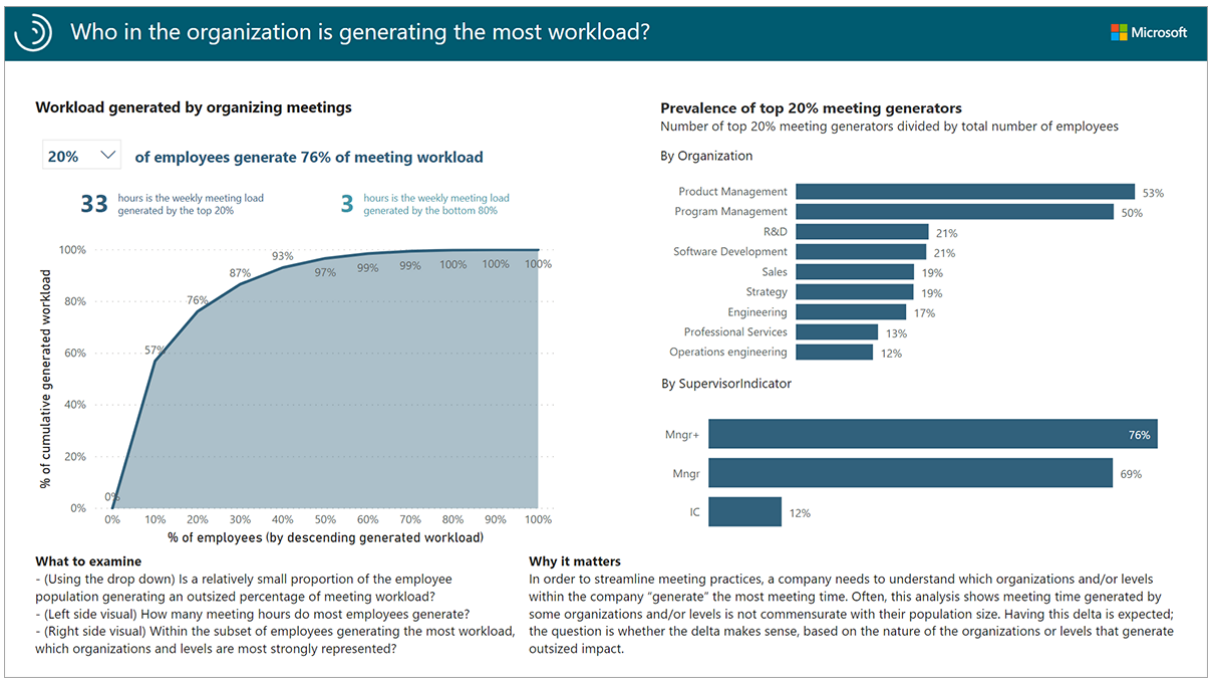
Report: Who in the organization is generating the most workload?

The *Generated workload* report helps organizations understand the **source of meeting overload** by looking at **who is generating the most meetings**.

Note

Generated workload meeting hours are **the number of meeting hours an employee** created for internal attendees by organizing meetings.

- The **drop-down menu** on the top allows you to play with the "**prevalence of top X% meeting generators**." In the example here, the slider is **set to 20%,** meaning that **20% of the employees generate 76% of the meeting** workload in the organization.
- The chart on the left shows the distribution of employees by Generated workload meeting hours, for example, **50% of employees** generate **97% of meeting hours**.
- The charts on the right display the percentage of top meeting generators—as defined by the slider—by Organization and by Supervisor Indicator. In the example here, Product Management and Program Management have the highest representation of meeting generators, at 53% and 50%, respectively.



The *Generated workload* report helps you answer questions about **whether meeting time reflects widespread company scheduling** behaviour or if it's the result of the behaviours of a subset of employees who schedule lots of meetings. It also provides the predominant functions and levels of the biggest meeting load generators.

Employee Experience

The *Employee Experience* related pages relay information on **employee wellbeing, including time spent after hours and the amount of time employees spend in meetings with their manager**. The Employee Experience reports let you visualize and explore the following business questions:

- When does collaboration start impacting after hours?
- **Who in the organization is at risk of burnout?**

- How is manager double-booking impacting employees?
- Are employees receiving sufficient one-on-one coaching time?
- Are managers co-attending too many meetings?
- **What managerial behaviours exist across the organization?**

These reports can help identify workplace behaviours that may be impacting employee engagement. The insights they generate can be used to target areas to improve employee-manager relationships and reduce the risk of burnout.

The two Employee Experience reports in bold above are highlighted here.

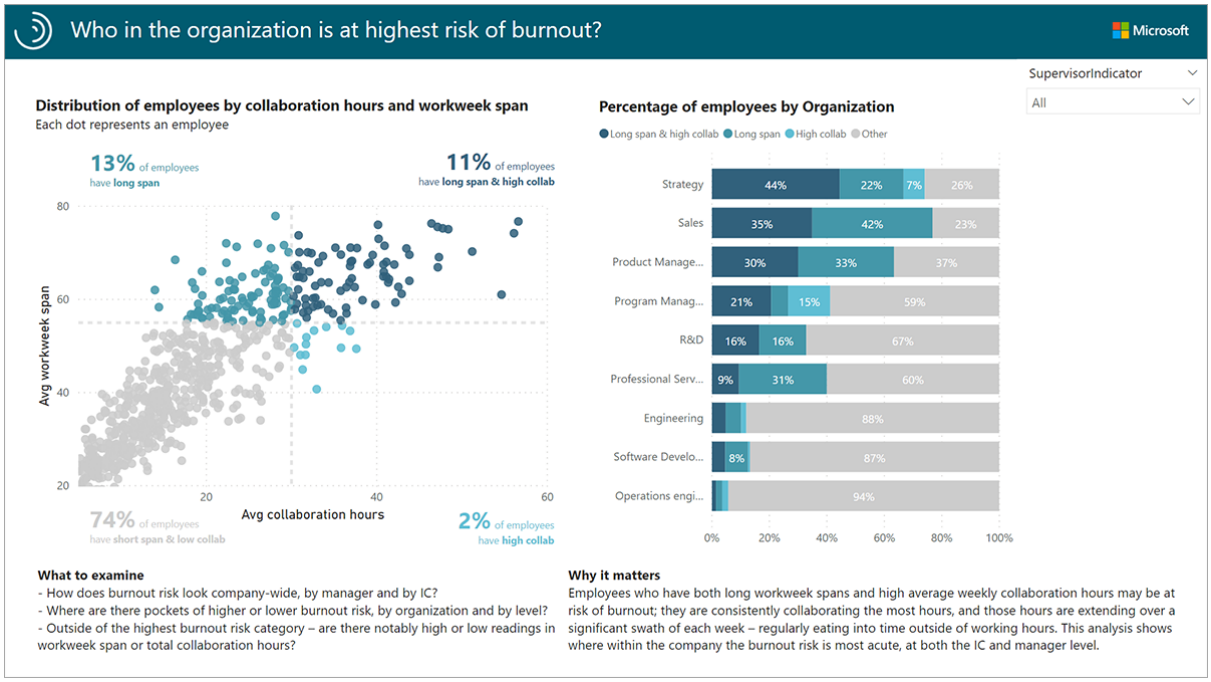
Report: Who in the organization is at highest risk of burnout?

The *Burnout risk* report helps you identify groups that may be at r**isk for burnout by giving an organization-wide look at average collaboration** hours and workweek span.

Note

Workweek span is the time between the **person's first collaboration activity** (*email*, *Teams call/chat, meeting*) and the **last collaboration activity of each day**, summed over the **work week**.

- The chart on the left is a **scatterplot of employees by average collaboration hours** (X-axis) and workweek span (Y-axis). Each dot represents an employee. Employees are classified into the following categories:
    - **High collab** - Employees with high collaboration hours but short workweek span
    - **Long span** - Employees with long workweek span but low collaboration hours
    - **Long span and high collab** - Employees with high collaboration hours and high workweek span
    - **Other** - Employees with low collaboration hours and short workweek span
- The chart on the right shows the distribution of employees by collaboration hours and workweek span by group. In the example here, **44% of employees** in the Strategy organization have both **long workweek spans** and **high average weekly** collaboration hours.



Tip

Select any bar on the right to filter the chart on the left by the data in the selected bar (this filter is only applied in the context of this report page).

If employees have **consistently high collaboration hours and not enough time to complete tasks**, work can **spill over into after hours**, resulting in a **longer workweek**. These employees may have **difficulty managing their workloads**, which may lead to **stress and eventual burnout**. The *Burnout risk* report provides a starting point for organizations to identify **at-risk groups** who may benefit from **task prioritization** and **workload balancing**.

Report: What managerial behaviours predominate in the organization?

Manager *relationship* report

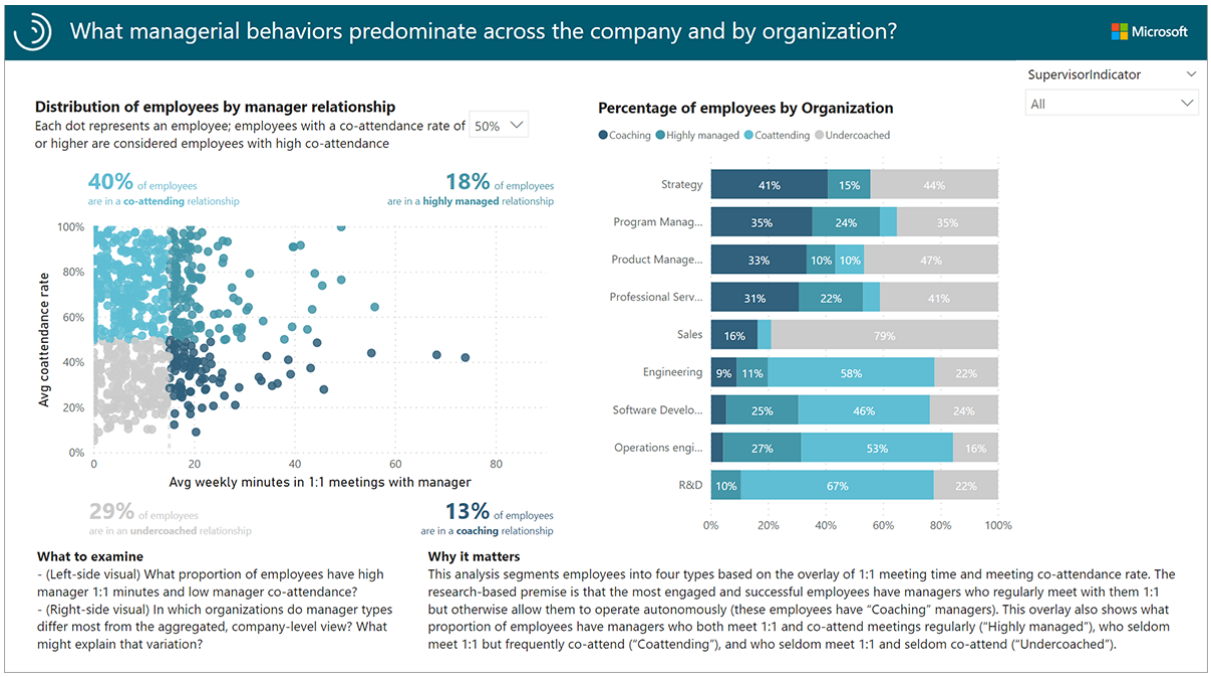
a) Coaching
b) Highly Managed
c) **Coattending**
d) **Under coached**

The *Manager relationship* report provides a view of managerial behaviours in terms of **one-on-one coaching time** and **manager co-attendance** in meetings.

- The chart on the left is a scatterplot of employees by **average weekly minutes in one-on-one meetings with their manager (X-axis) and average co-attendance in meetings with their manager (Y-axis).** The combination of one-on-one time and co-attendance for each employee classifies them into one of the following manager relationship categories:
    - **Coaching** - Employees who have managers who regularly meet with them **one-on-one** but otherwise **allow them to** operate autonomously.

- **Highly managed** - Employees who have managers who both meet **one-on-one** with them and **co-attend meetings regularly**.
- **Coattending** - Employees who have managers who seldom meet with them one-on-one but frequently co-attend in meetings.
- **Undercoached** - Employees who have managers who seldom meet with them one-on-one and seldom co-attend in meetings.

- In the example here, only **13% of employees throughout the organization have a "coaching"** relationship with their managers. These employees have sufficient one-on-one time with their managers and are empowered to operate autonomously in most of their meetings.
- The chart on the right shows the percentage of employees in each of these manager relationship categories by group. In the example here, Strategy has the highest proportion of employees with a **coaching relationship** on the team, but at **41% there is still significant room left for improvement.**

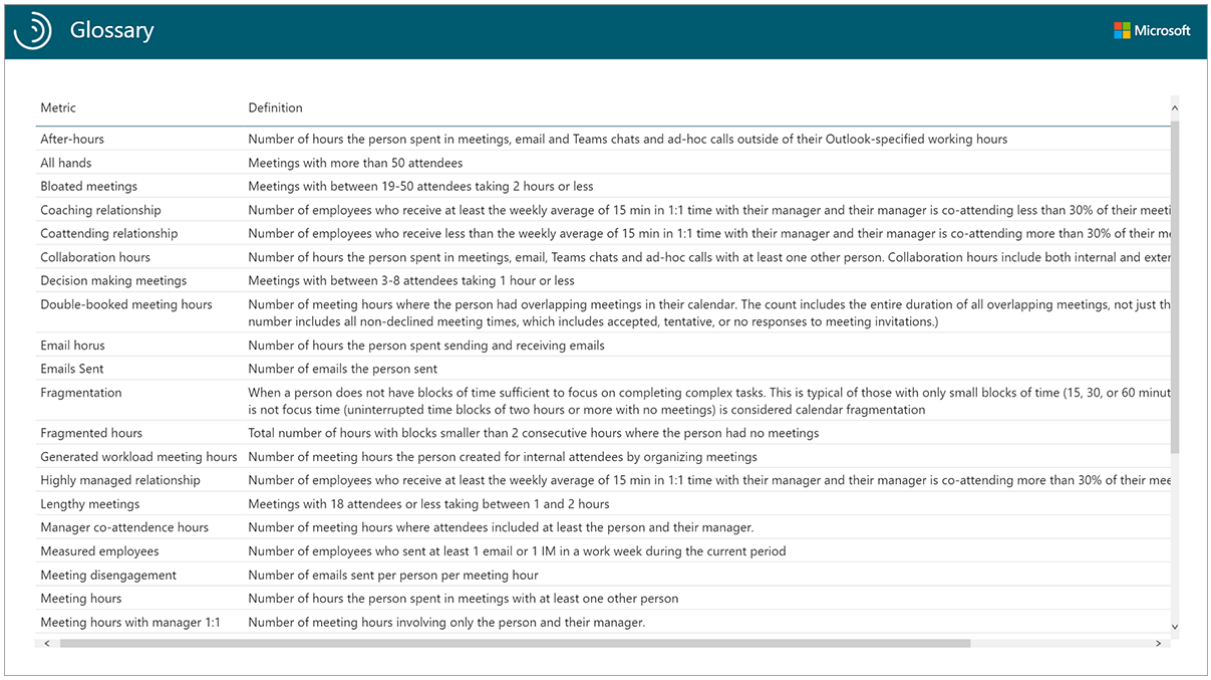


The most engaged and successful employees get plenty of **coaching time** with their **managers**, but are also empowered to **operate autonomously in meetings**.

The ***Manager relationship*** report helps answer questions about the **managerial practices** that predominate across an organization, **allowing you to identify** where the **most effective manager** practices are occurring, and where opportunities exist to increase coaching and delegation.

Report: Glossary (All hands, Double Booking, Meeting disengagement)

A *Glossary* is also included in the dashboard, **providing a reference for the metrics** and terminology used across the **Ways of working assessment**.



Metric	Definition
After-hours	Number of hours the person spent in meetings, email and Teams chats and ad-hoc calls outside of their Outlook-specified working hours
All hands	Meetings with more than 50 attendees
Bloated meetings	Meetings with between 19-50 attendees taking 2 hours or less
Coaching relationship	Number of employees who receive at least the weekly average of 15 min in 1:1 time with their manager and their manager is co-attending less than 30% of their meeti
Coattending relationship	Number of employees who receive less than the weekly average of 15 min in 1:1 time with their manager and their manager is co-attending more than 30% of their m
Collaboration hours	Number of hours the person spent in meetings, email, Teams chats and ad-hoc calls with at least one other person. Collaboration hours include both internal and exter
Decision making meetings	Meetings with between 3-8 attendees taking 1 hour or less
Double-booked meeting hours	Number of meeting hours where the person had overlapping meetings in their calendar. The count includes the entire duration of all overlapping meetings, not just th number includes all non-declined meeting times, which includes accepted, tentative, or no responses to meeting invitations.)
Email horus	Number of hours the person spent sending and receiving emails
Emails Sent	Number of emails the person sent
Fragmentation	When a person does not have blocks of time sufficient to focus on completing complex tasks. This is typical of those with only small blocks of time (15, 30, or 60 minut is not focus time (uninterrupted time blocks of two hours or more with no meetings) is considered calendar fragmentation
Fragmented hours	Total number of hours with blocks smaller than 2 consecutive hours where the person had no meetings
Generated workload meeting hours	Number of meeting hours the person created for internal attendees by organizing meetings
Highly managed relationship	Number of employees who receive at least the weekly average of 15 min in 1:1 time with their manager and their manager is co-attending more than 30% of their mee
Lengthy meetings	Meetings with 18 attendees or less taking between 1 and 2 hours
Manager co-attendence hours	Number of meeting hours where attendees included at least the person and their manager.
Measured employees	Number of employees who sent at least 1 email or 1 IM in a work week during the current period
Meeting disengagement	Number of emails sent per person per meeting hour
Meeting hours	Number of hours the person spent in meetings with at least one other person
Meeting hours with manager 1:1	Number of meeting hours involving only the person and their manager.

Learn more

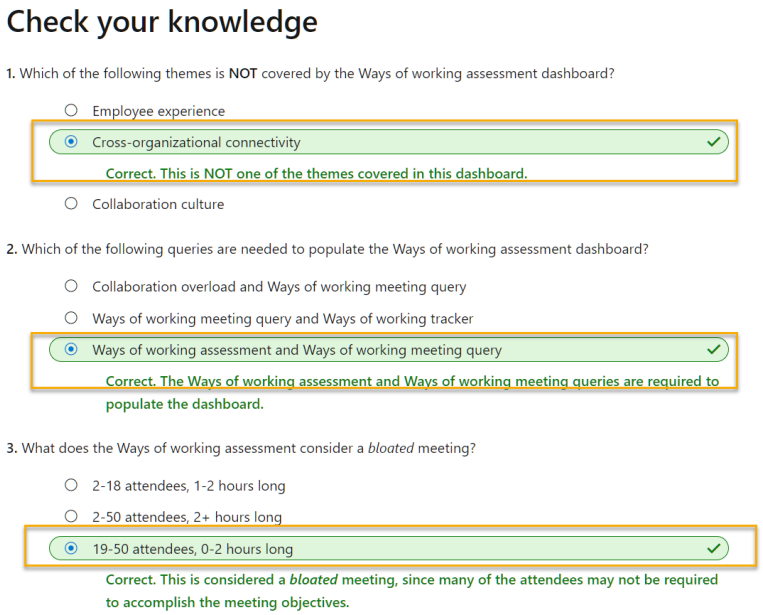
- Metric descriptions
- About the reports

Knowledge Check

1. Which of the following themes is **NOT** covered by the Ways of working assessment dashboard?

2. Which of the **following queries** are needed to populate the **Ways of working assessment dashboard**?

3. What does the Ways of working assessment consider a ***bloated*** meeting?



Summary for the Ways of working assessment dashboard

Completed100 XP

- 3 minutes

Your company wanted to **effectively deploy and measure the impact of some** initiatives designed to streamline ways of working, reduce burnout risk, and boost manager effectiveness. To do this, you needed data **tracking employees' work behaviours** and *collaboration patterns*.

By using the **Ways of working assessment dashboard** in Power BI, you got the insights that enabled your CHRO to understand how long and through what modes people across your company collaborate. You identified **pockets of burnout risk and trends in manager coaching**. Your CHRO can now prioritize transformation initiatives based on need, and **focus interventions on the employee groups** who will benefit the most.

It would be difficult to build a similar report from scratch without the **Viva Insights data** in Workplace Analytics and the Ways of working assessment dashboard. Even if your CHRO has approval to access raw collaboration data, you would have to figure out how to gather it for all users, make sense of it, calculate business metrics, and maintain employee privacy and data security. Only then could you build your Ways of working assessment report.

The Ways of working assessment helped **you quantify the impact of your company's cultural transformation and recommend measurable changes** that boost employee engagement, increase productivity, and unlock more agile ways of working, saving valuable time for people across the entire organization.

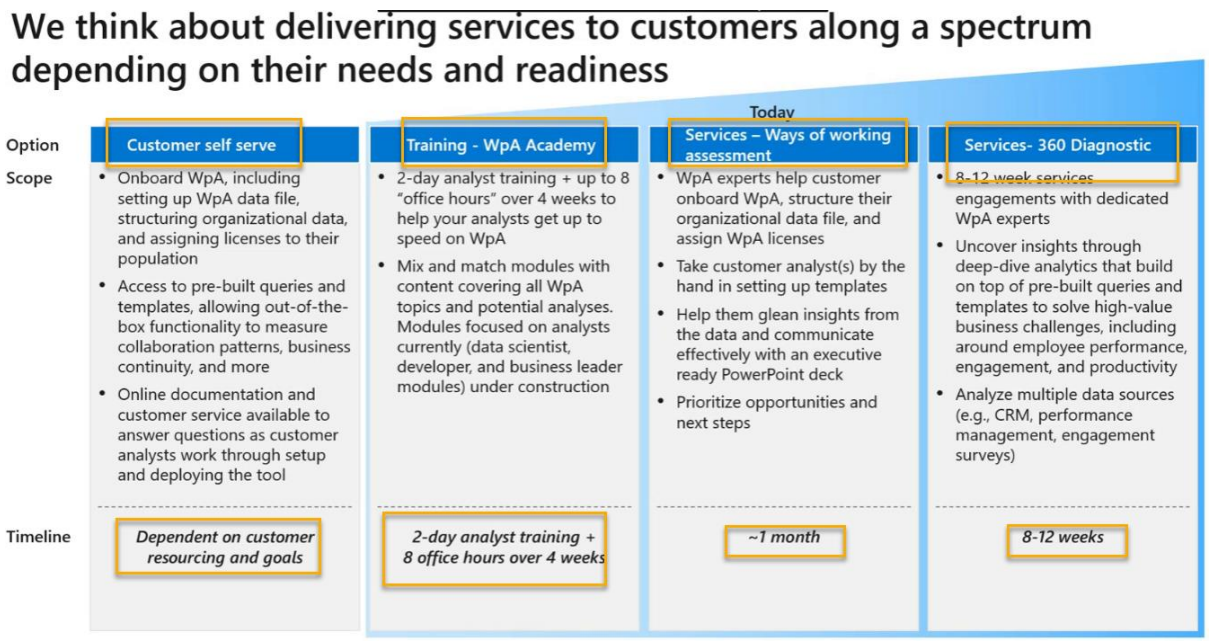
Now that you have finished this module, you should be able to:

- Explain what the **Ways of working Assessment dashboard** in Power BI is, and why it provides an important perspective.
- Use the **Query designer** for template setup and to load the data and select the dashboard settings in Power BI.

- Interpret the report results in the dashboard.

Ways of Working and Services Overview

- Different Services
  - Customer self server
  - Training – WpA Academy
  - Services – Ways of working assessment
  - Services – 360 Diagnostic



- What is the **Ways of Working assessment**

What is the Ways of Working assessment?

- A common set of diagnostic analyses to provide customers with a collaboration baseline
- Delivered in presentation deck/PowerPoint format
- A stepping stone to a larger opportunity/ engagement :
  - Collect inputs through **executive interviews**, **regular check-ins**, **readout**
  - Identify:
    - What other opportunities can Workplace Analytics help address?
    - How can Workplace Analytics be tied to business priorities and initiatives?
- Usually 4-8 weeks in duration after onboarding and data setup is complete, depending on customer availability for check-ins and readout

- Workplace Analytics **Power BI** Template

Workplace Analytics Power BI templates

Workplace Analytics currently has a Ways of working prebuilt Power BI dashboard available:

1 Business continuity	Gain insights into how your organization is being impacted by remote work.
2 Microsoft Teams insights	Analyze Microsoft Teams collaboration and adoption across your organization.
3 Ways of working assessment	Conduct a broad diagnostic of your organization's collaboration culture and work experience.
4 Influence insights	Visualize and explore where influencers exist and who makes decisions in your organization.
5 Ways of working tracker	Track changes in collaboration over time and target opportunities to improve work culture.
6 Sales business continuity	Gain insights into how sellers and Sales are being impacted by the shift to remote work.
7 Return to worksites	Determine how to allocate limited capacity seats to employees.
8 Behavior patterns for Glint	View workplace behavioral patterns with employee sentiment scores.
9 Quickstart overview	Get a quick perspective on how your organization is collaborating.
10 Collaboration overload	See where overall collaboration patterns, time fragmentation, or meeting quality could improve.
11 Manager impact	Measure behaviors and trends of people managers across your organization.

Introduction and Delivery Approach video

- Workplace Analytics Assessment

What is the Ways of Working assessment?

- A common set of diagnostic analyses to provide customers with a collaboration baseline
- Delivered in presentation deck/PowerPoint format
- A stepping stone to a larger opportunity/ engagement :
  - Collect inputs through **executive interviews**, **regular check-ins**, **readout**
  - Identify:
    - What other opportunities can Workplace Analytics help address?
    - How can Workplace Analytics be tied to business priorities and initiatives?
- Usually 4-8 weeks in duration after onboarding and data setup is complete, depending on customer availability for check-ins and readout

- **Project roles** and **responsibilities**

Typical project team roles and responsibilities



Delivery Lead (EM)

- Provide day-day oversight for engagement activities
- Define roadmap, plan
- Manage relationship with customer sponsors and leadership, through executive interviews, readouts, and other relevant engagements[1]



Analyst(s)

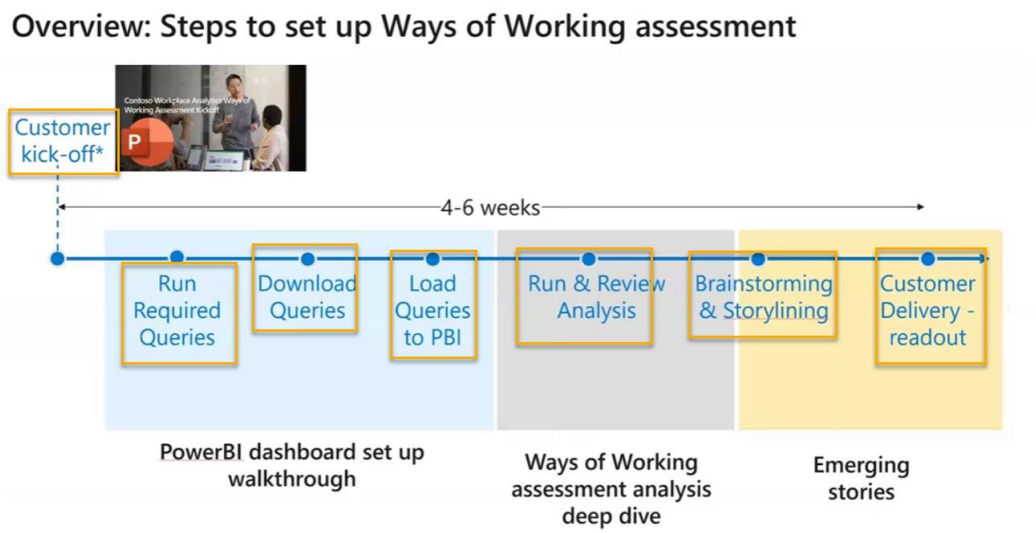
- Lead and perform Workplace Analytics analysis
- Drive daily communication with customer working team and analysts
- Train customer analysts

Typical customer team structure

Executive Sponsor	• High-level oversight and support • Workplace Analytics advocate
Program Lead	• Overall direction • Deliverable review • Project support
Analyst(s)	• Get trained in using WPA • Provide necessary support on data requests and organizational contexts

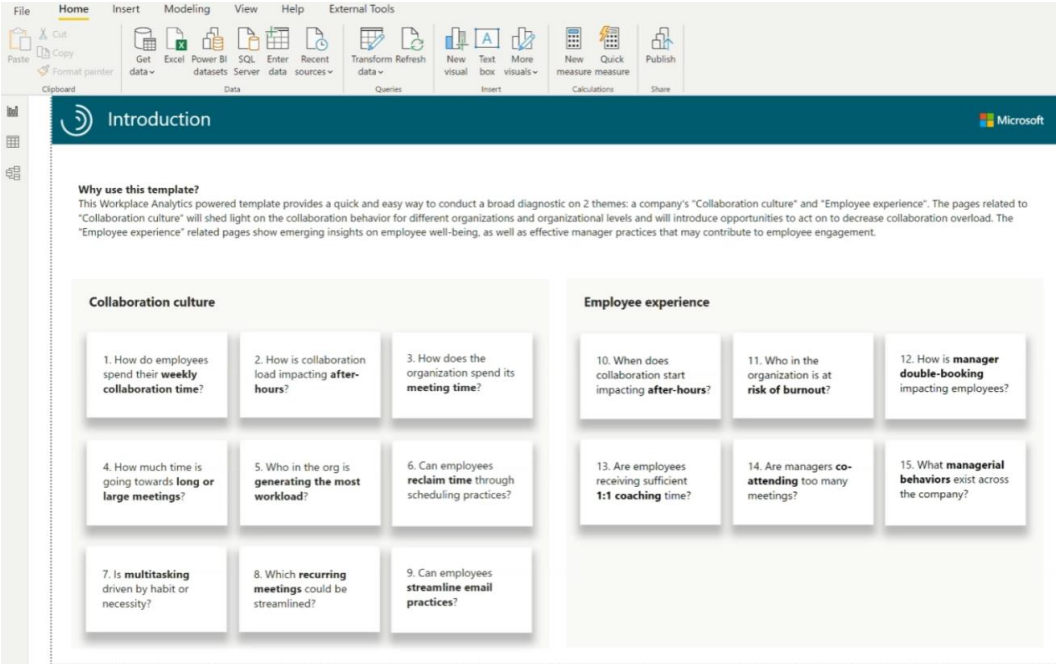
1. Bring in Workplace Analytics team members, GBB and AE based on activities

- 4-6 weeks (**Power BI dashboard**, **Ways of thinking assessment**, **Emerging stories**)

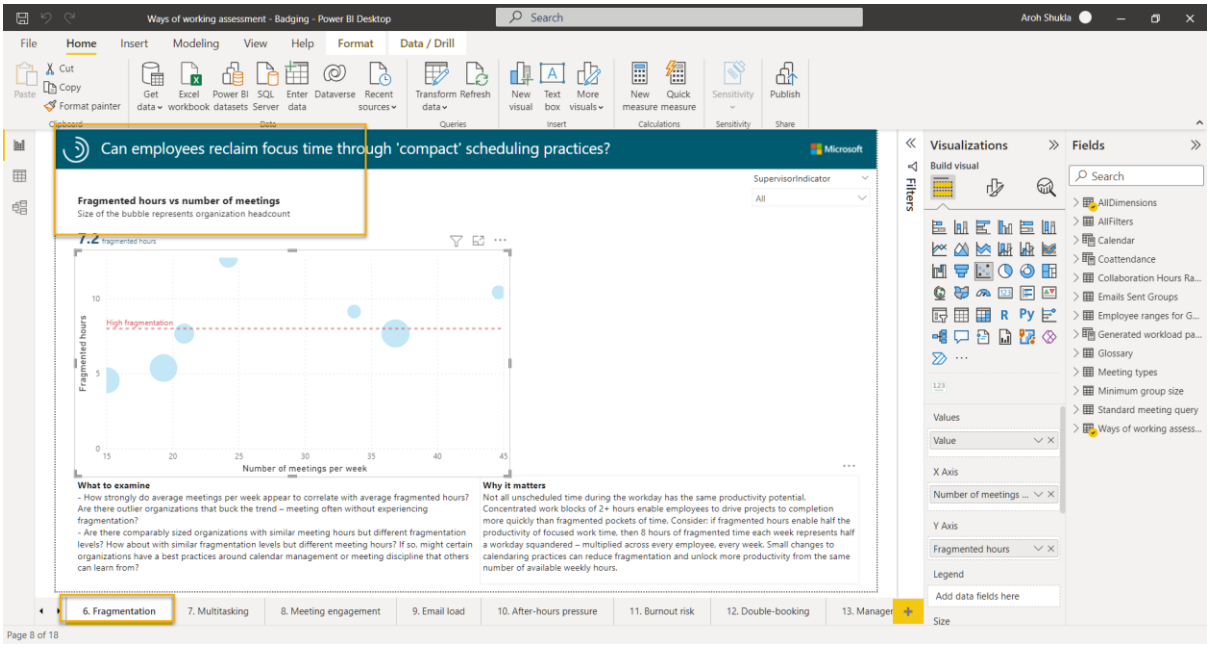


Power BI Walkthrough video

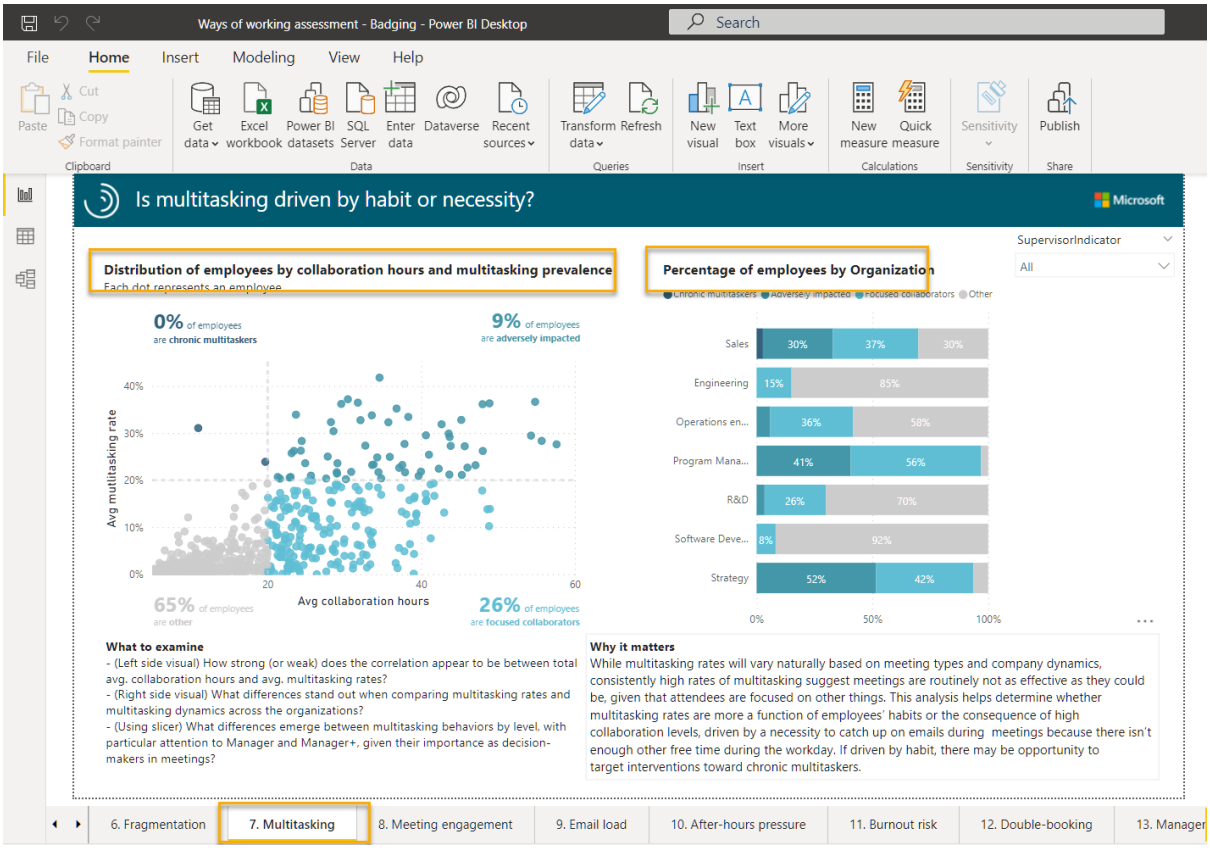
- 6 tabs



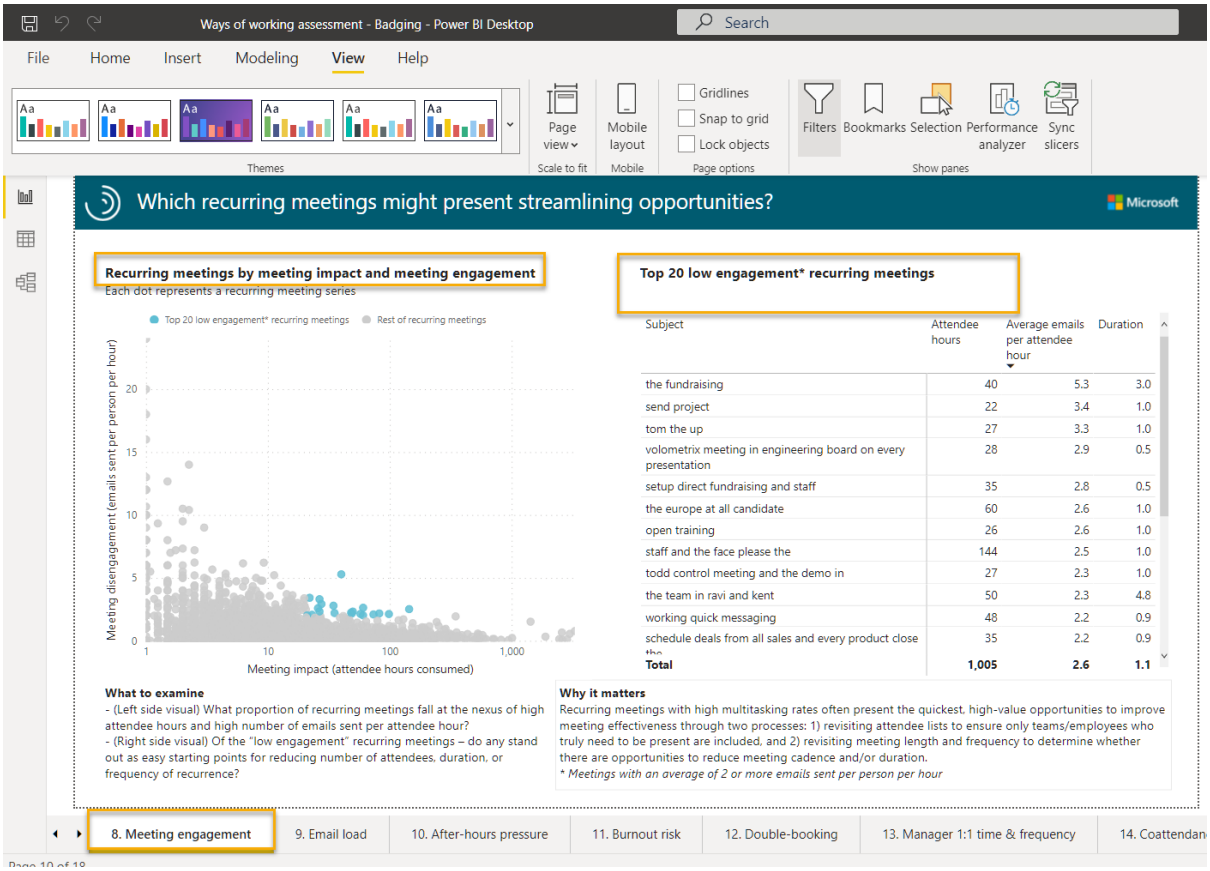
- 6 Fragmentation



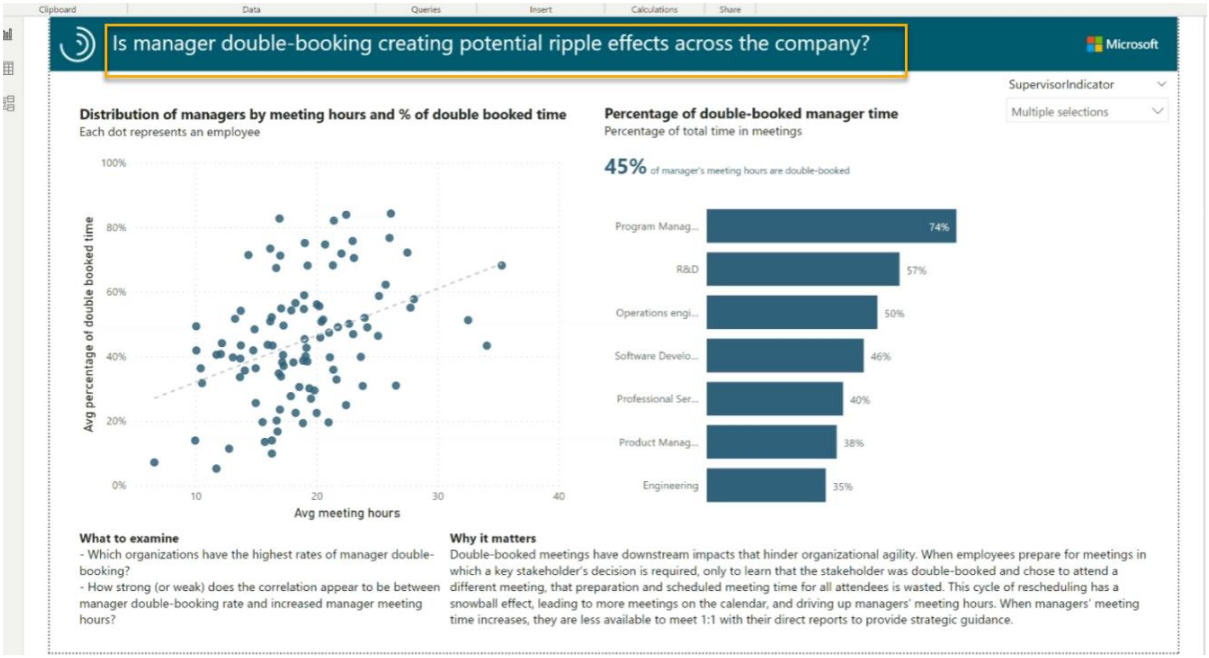
- 7 Multitasking



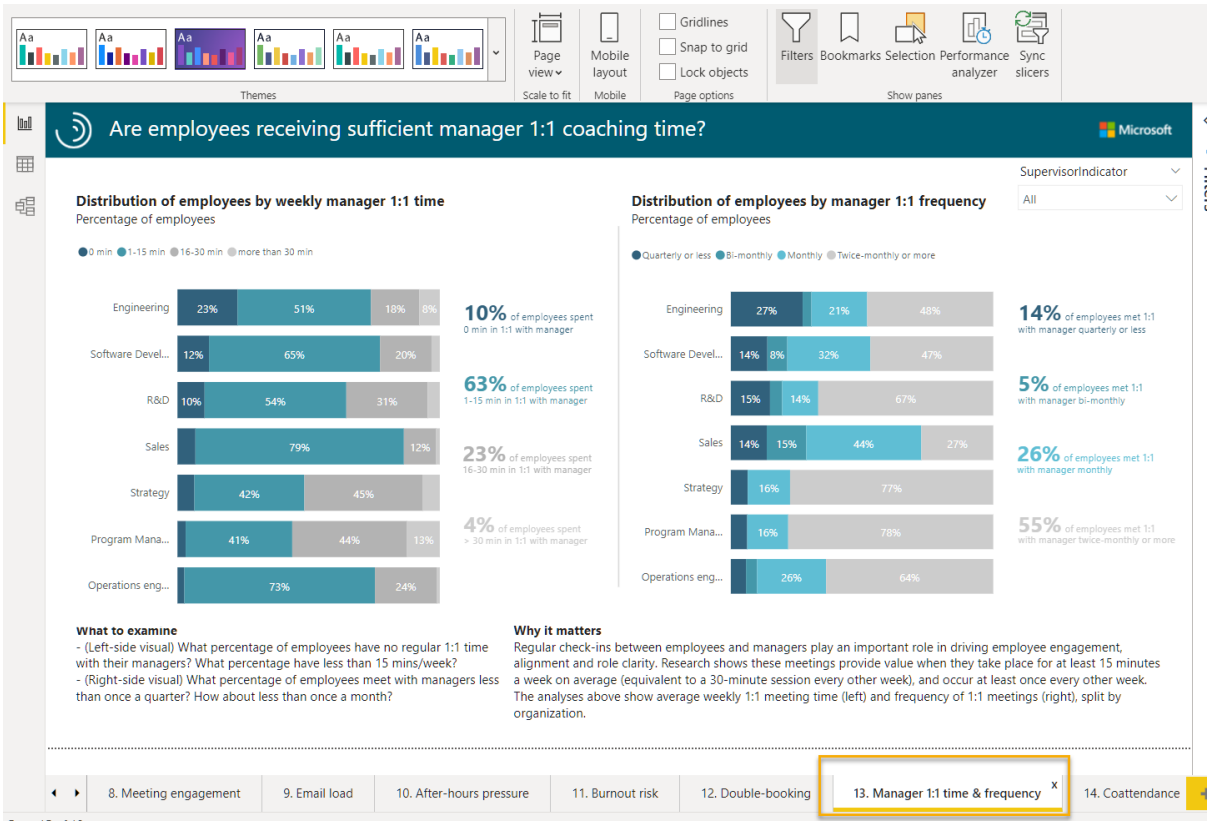
- 8. Meeting engagement



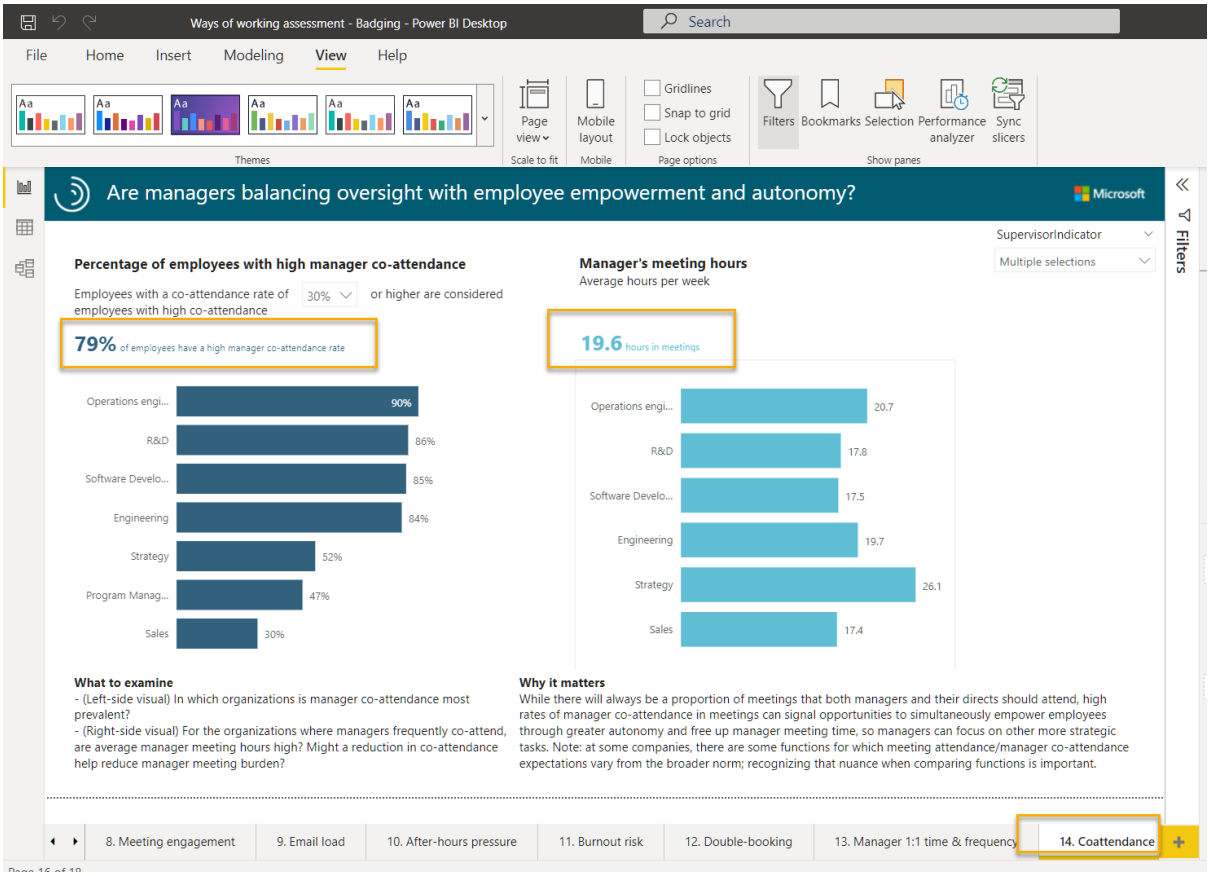
- 12. Double-booking



- 13. Manager 1:1 time & frequency

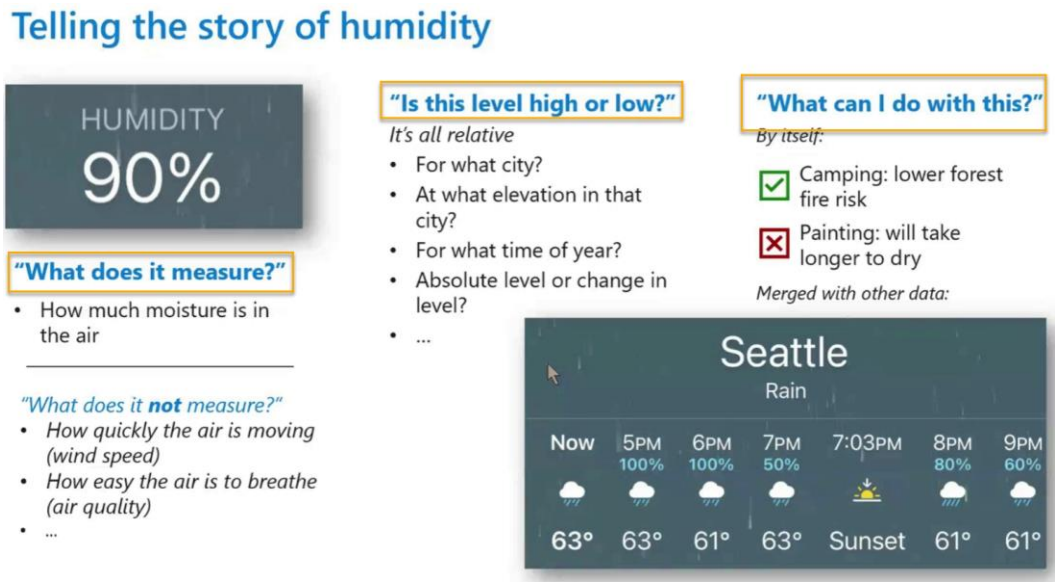


- 14. Co attendance

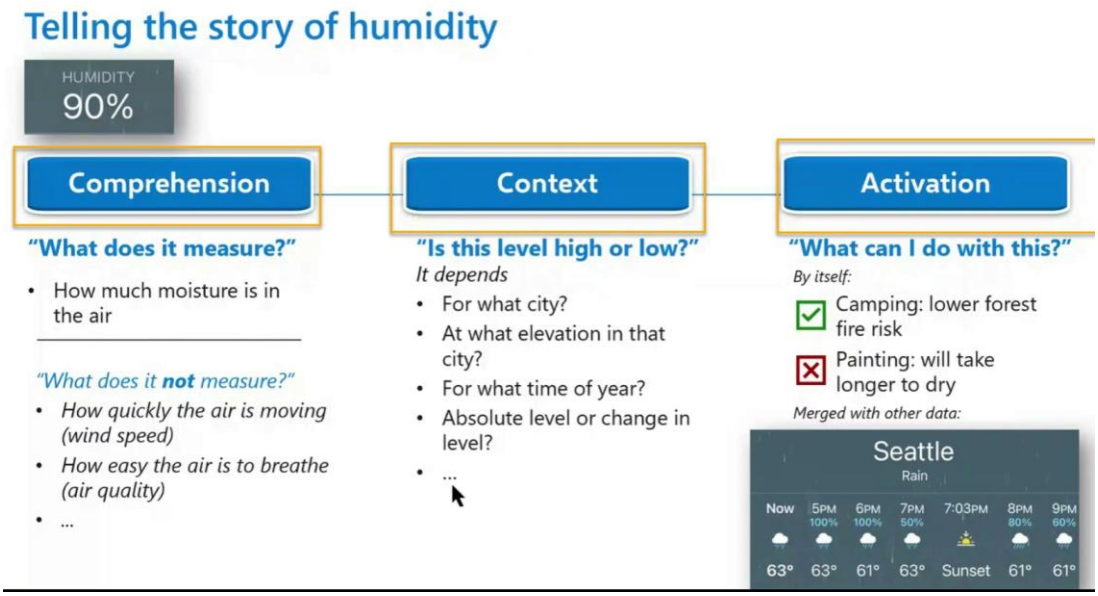


Emerging Stories video

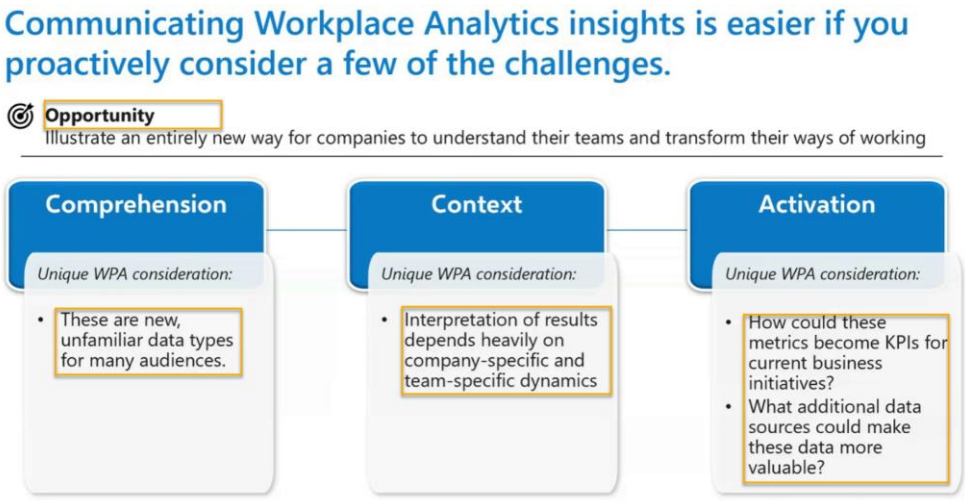
- **Humidity** , 3 main data points
  - What does it measure?
  - Is this level high or low?
  - What can I do with this?



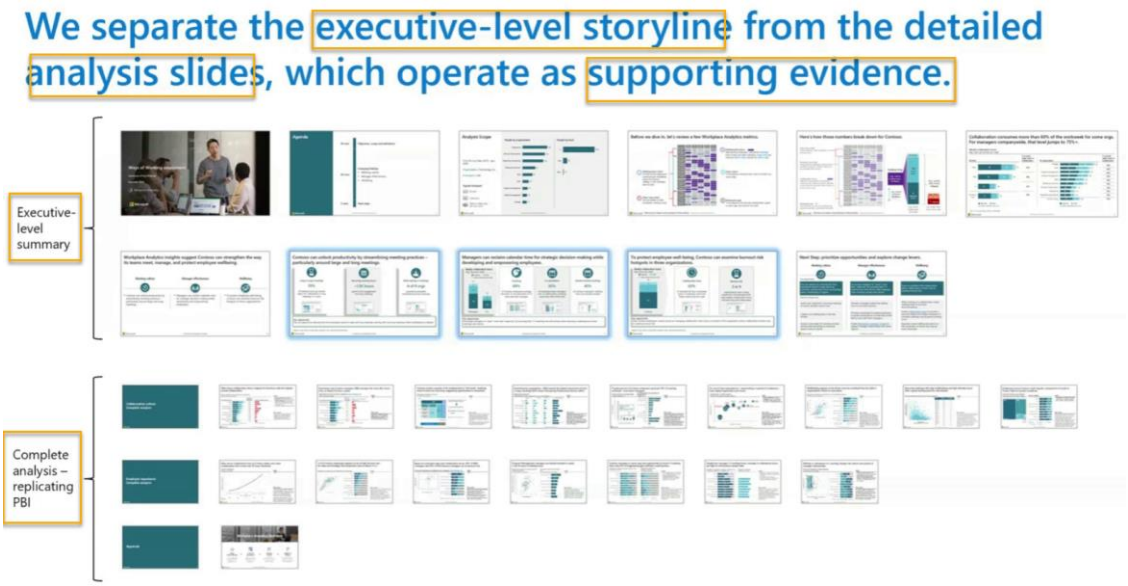
  - CCA – **Comprehension**, **Context**, and **Activation**



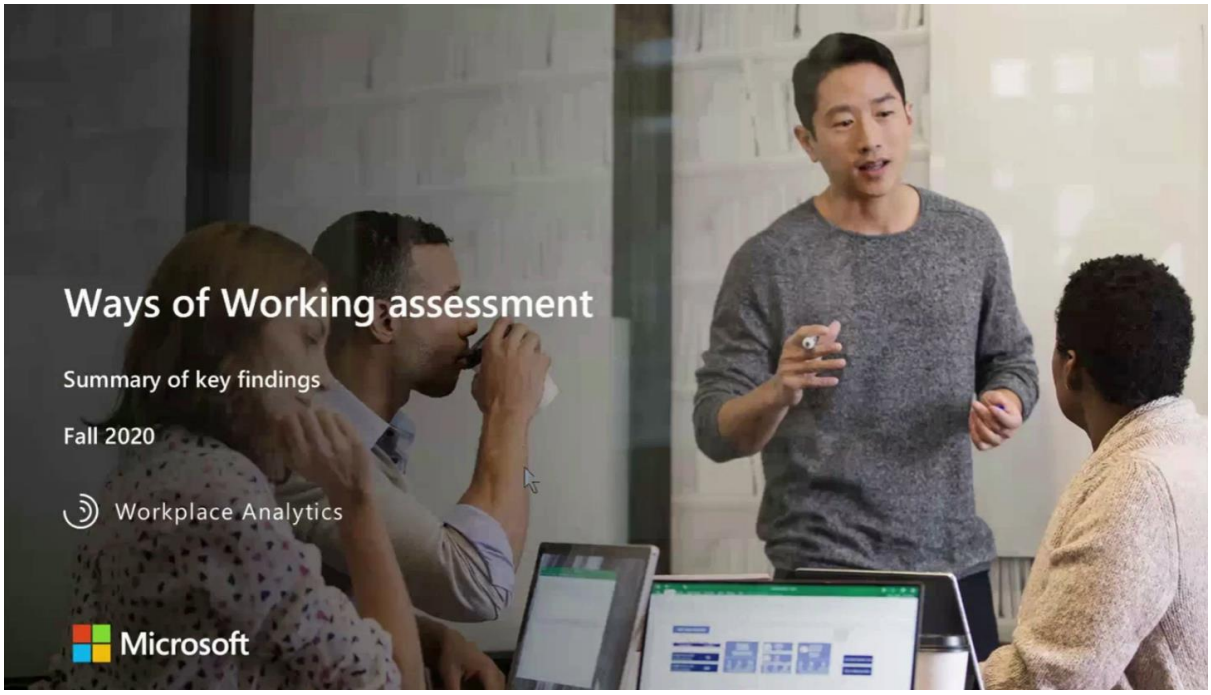
  - Opportunity



- Executive-level story line



1) Ways of working assessment (Summary of key findings)



Agenda

10 mins	Objectives, scope and definitions
45 mins	Emerging findings • Meeting culture • Manager effectiveness • Wellbeing
5 mins	Next steps

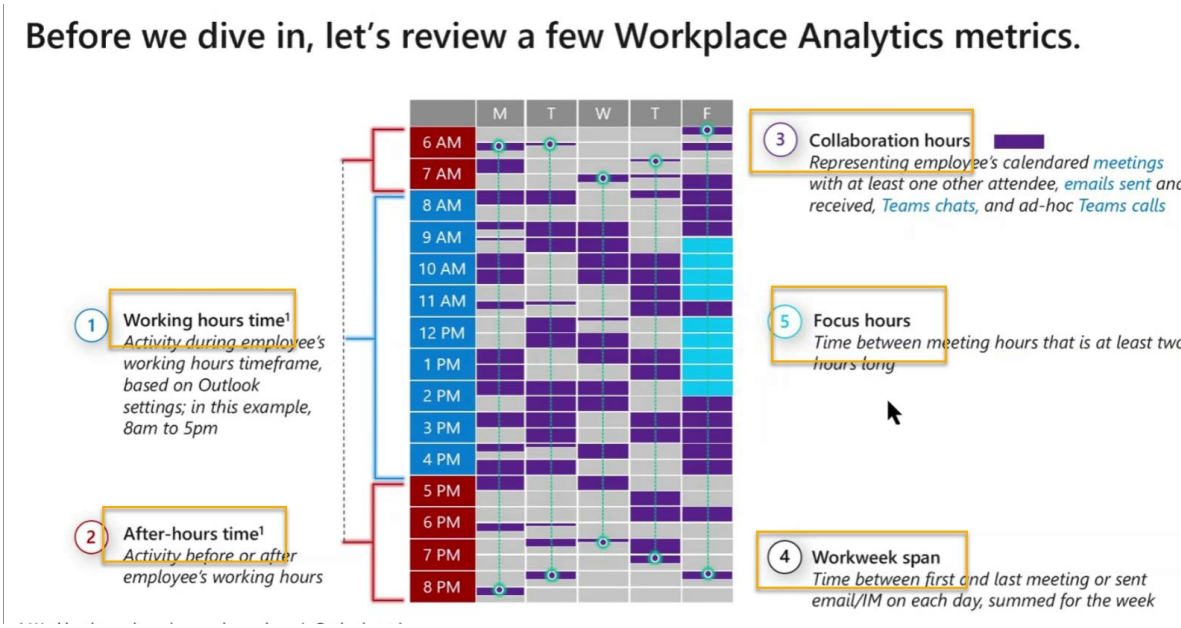
Analysis scope and Signals

a) Emails
b) Calendar
c) Teams chats & ad-hoc calls



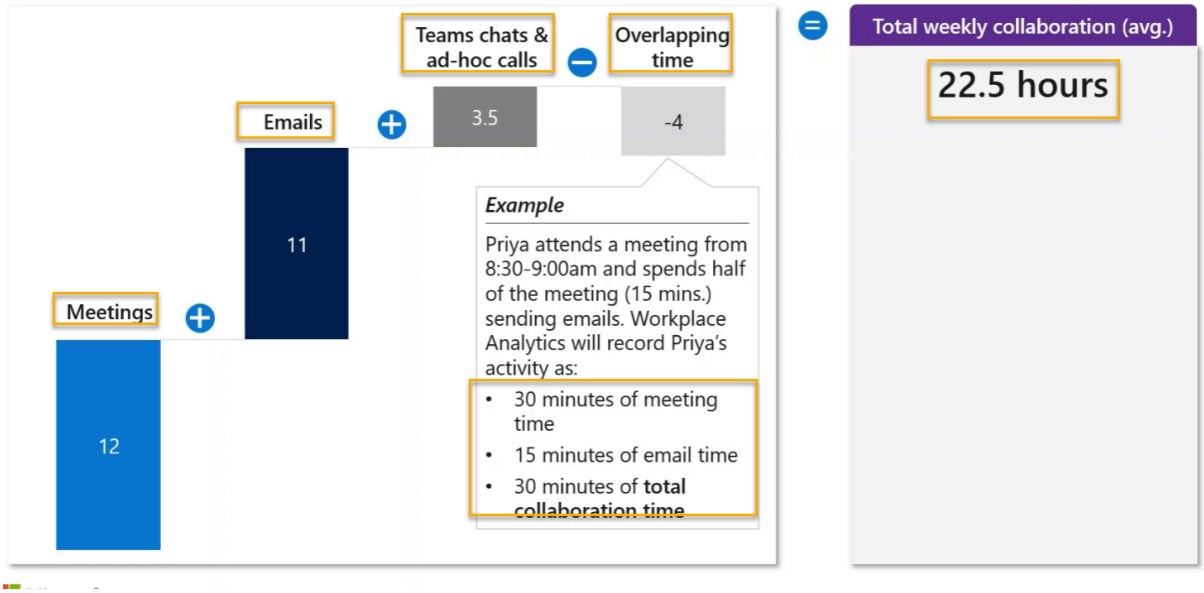
Workplace Analytics metrics

a) Working hours time
b) After-hours time
c) Collaborative hours
d) Focus hours
e) Workweek span



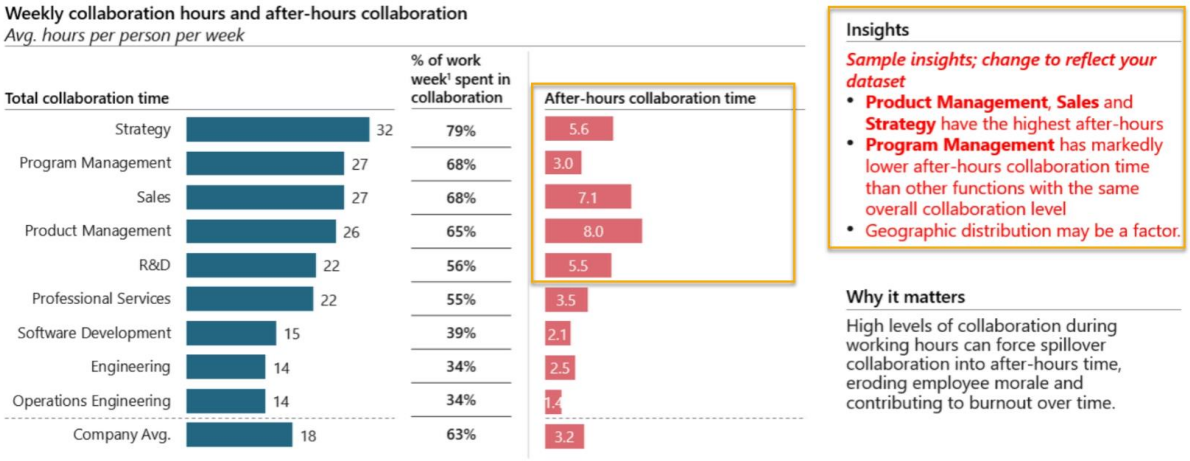
Breakdown for Contoso

Here's how those numbers break down for Contoso



After hours

After-hours collaboration time is highest for functions with the highest overall collaboration.



Insights

Sample insights; change to reflect your dataset

- **Product Management**, **Sales** and **Strategy** have the highest after-hours
- **Program Management** has markedly lower after-hours collaboration time than other functions with the same overall collaboration level
- Geographic distribution may be a factor.

Why it matters

High levels of collaboration during working hours can force spillover collaboration into after-hours time, eroding employee morale and contributing to burnout over time.

Workplace Analytics Insights

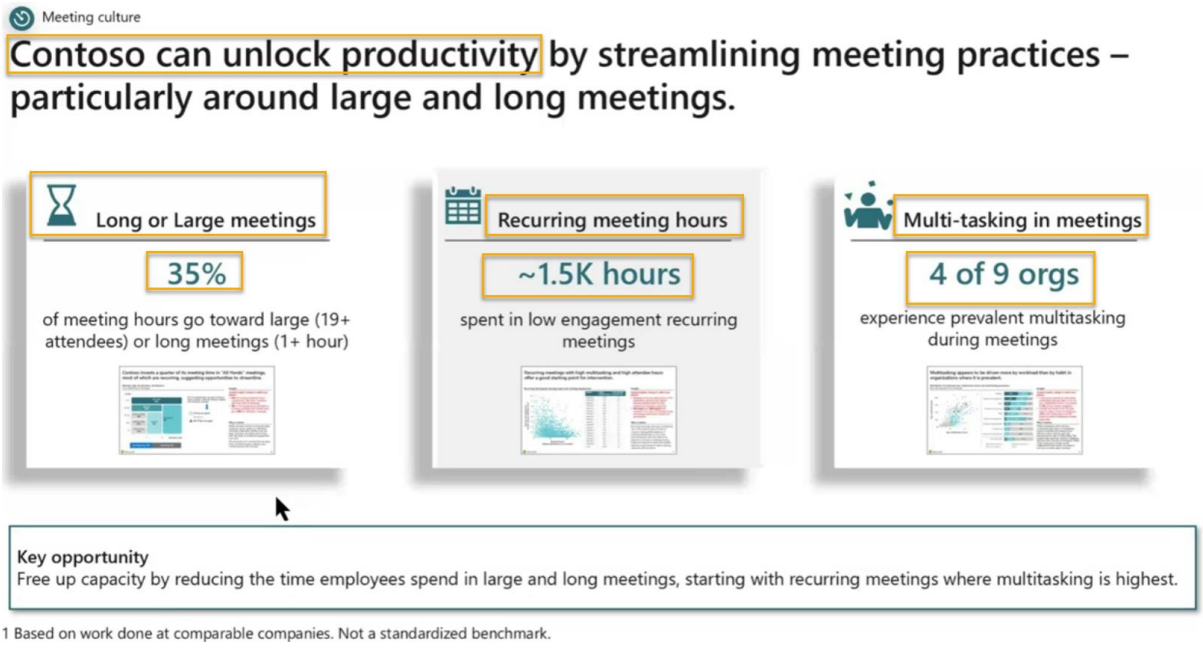
a) Meeting Culture

b) Manager effectiveness

c) Wellbeing



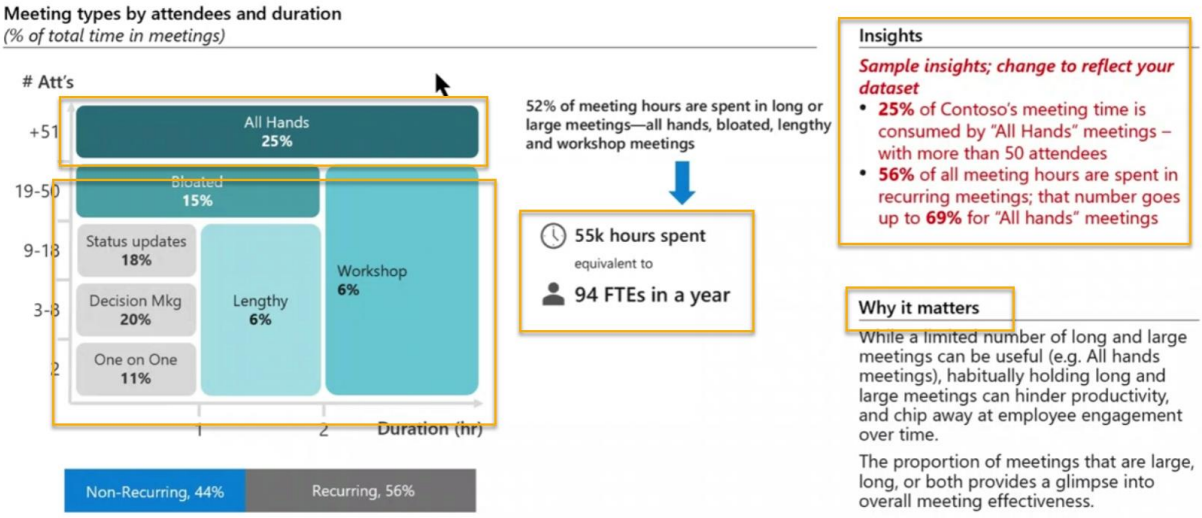
Contoso can unlock productivity



1 Based on work done at comparable companies. Not a standardized benchmark.

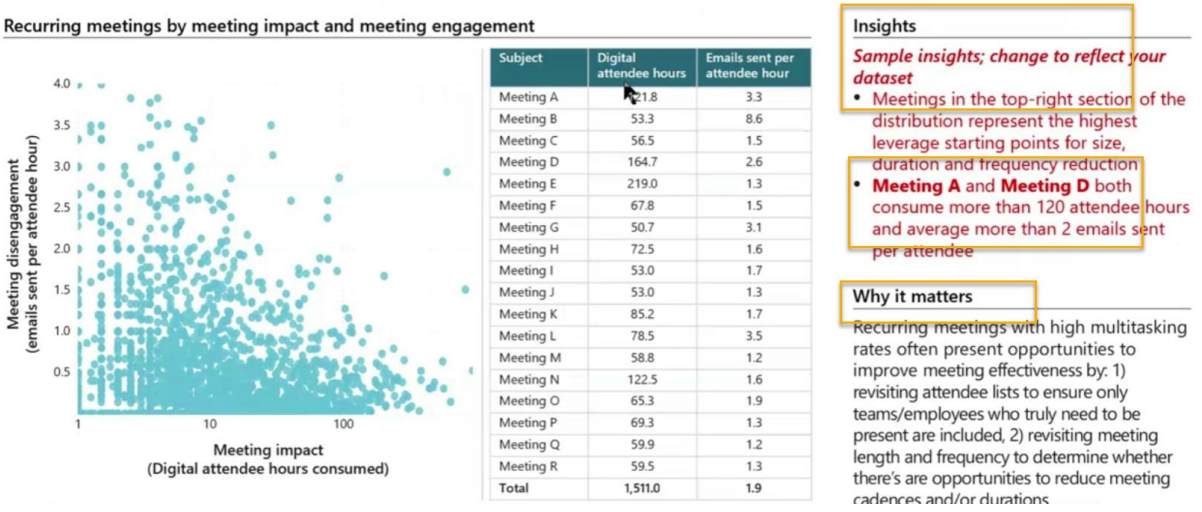
Zoom into Long or large meetings

Contoso invests a quarter of its meeting time in "All Hands" meetings, most of which are recurring, suggesting opportunities to streamline.



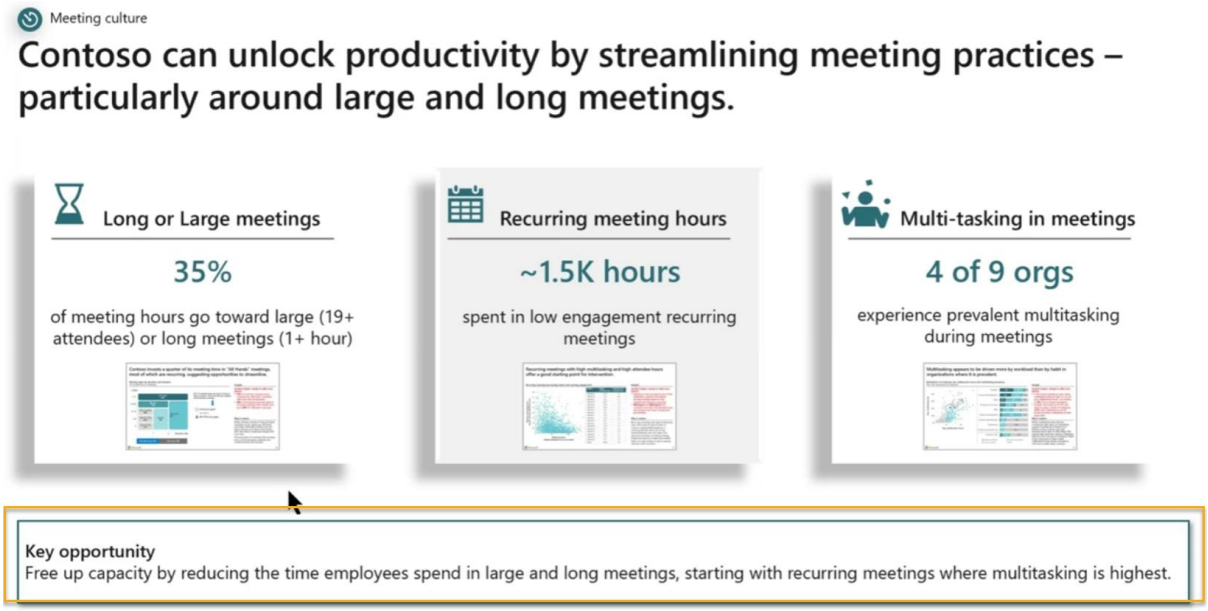
Recurring meeting hours

Recurring meetings with high multitasking and high attendee hours offer a good starting point for intervention.



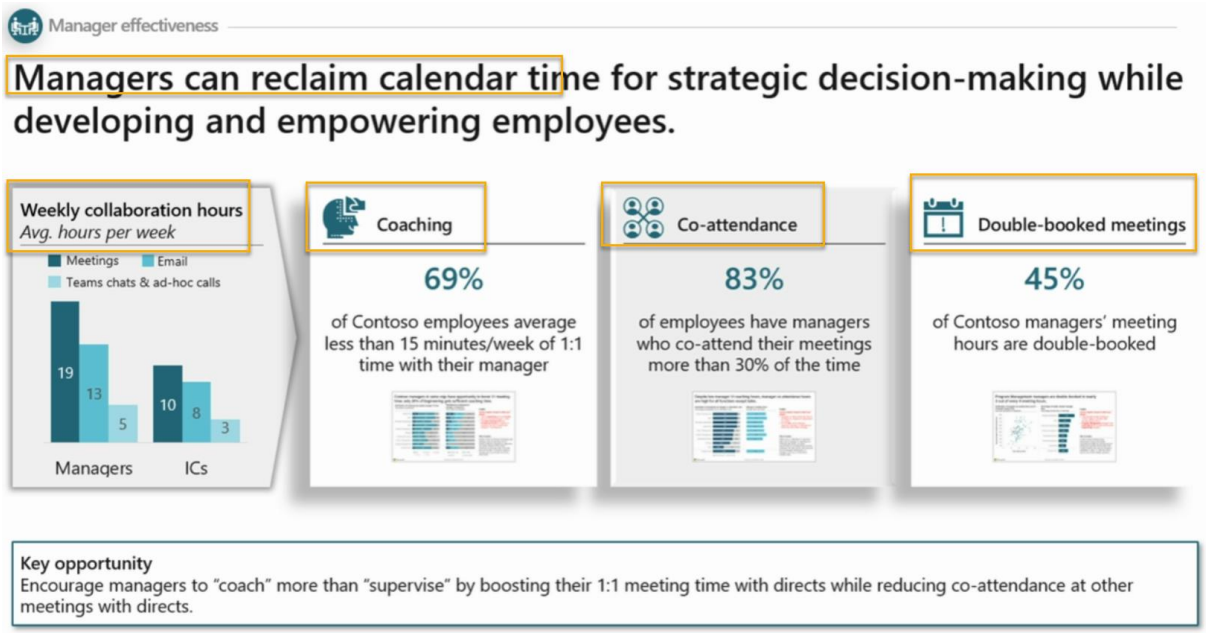
Subject	Digital attendee hours	Emails sent per attendee hour
Meeting A	121.8	3.3
Meeting B	53.3	8.6
Meeting C	56.5	1.5
Meeting D	164.7	2.6
Meeting E	219.0	1.3
Meeting F	67.8	1.5
Meeting G	50.7	3.1
Meeting H	72.5	1.6
Meeting I	53.0	1.7
Meeting J	53.0	1.3
Meeting K	85.2	1.7
Meeting L	78.5	3.5
Meeting M	58.8	1.2
Meeting N	122.5	1.6
Meeting O	65.3	1.9
Meeting P	69.3	1.3
Meeting Q	59.9	1.2
Meeting R	59.5	1.3
Total	1,511.0	1.9

Key Opportunity

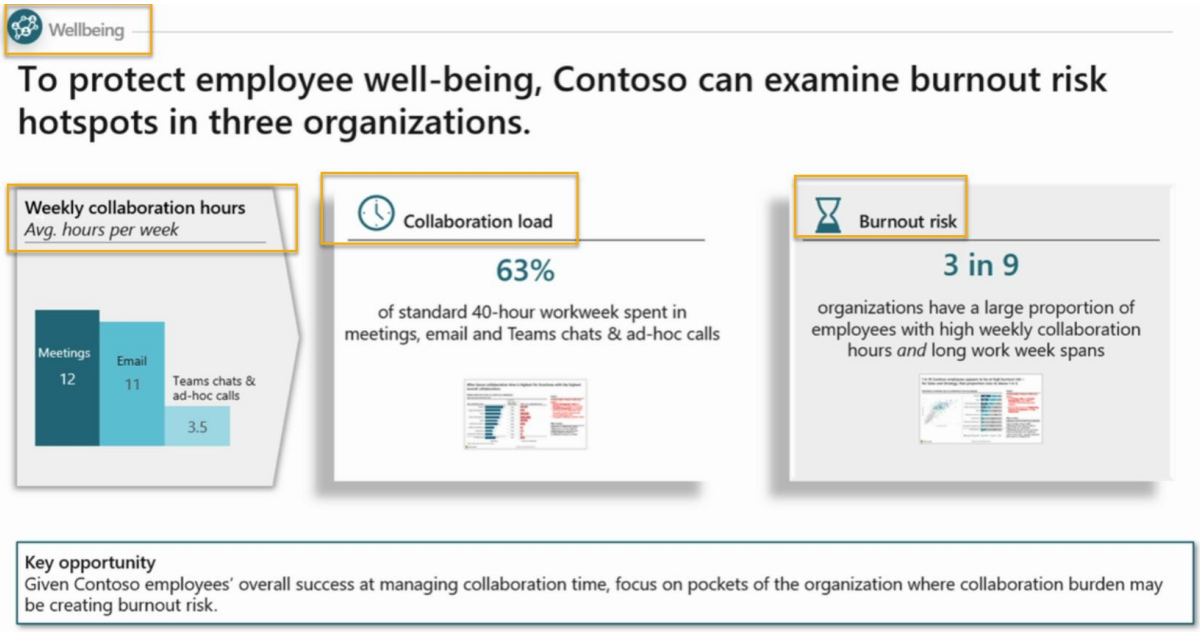


1 Based on work done at comparable companies. Not a standardized benchmark.

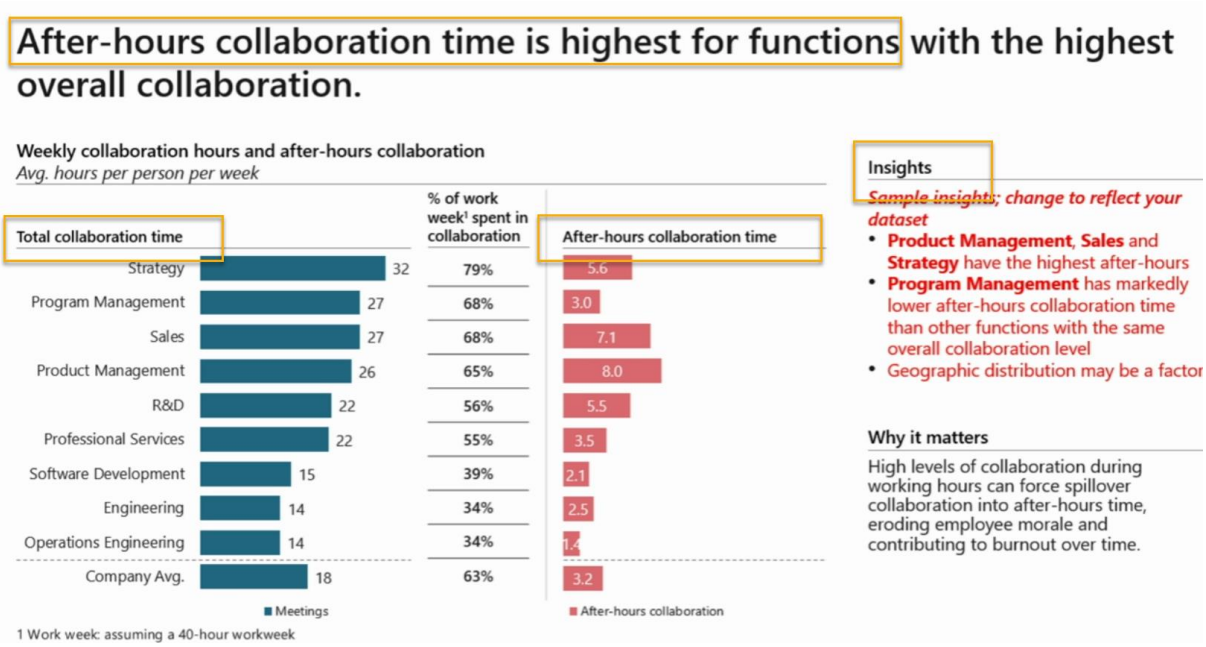
Manager's effectiveness



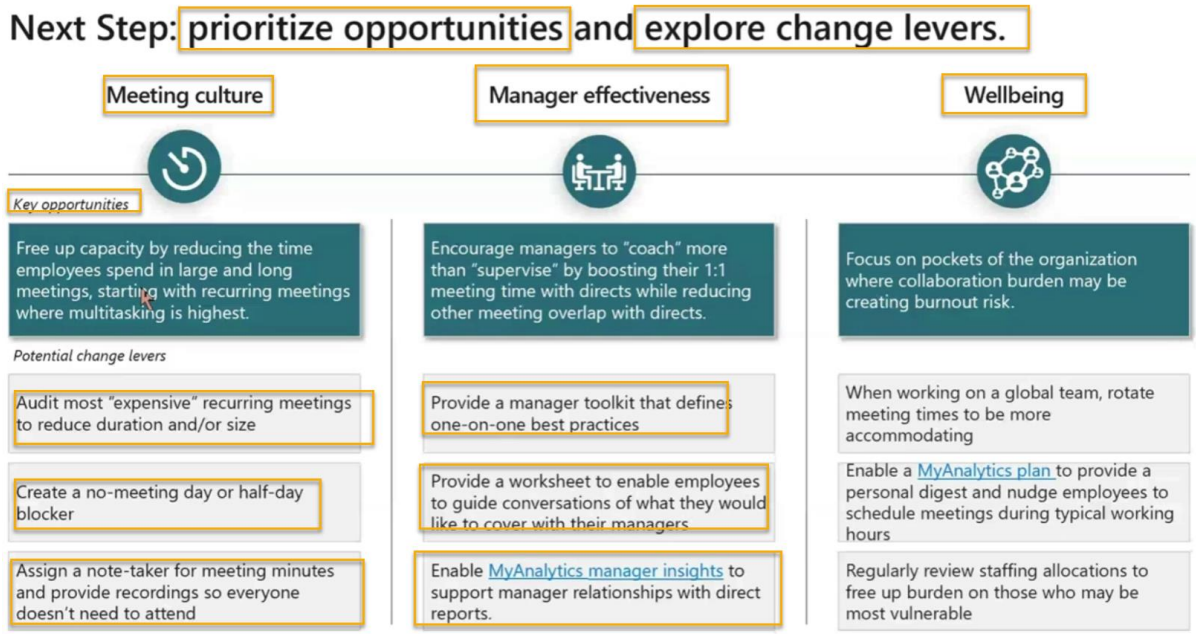
Wellbeing



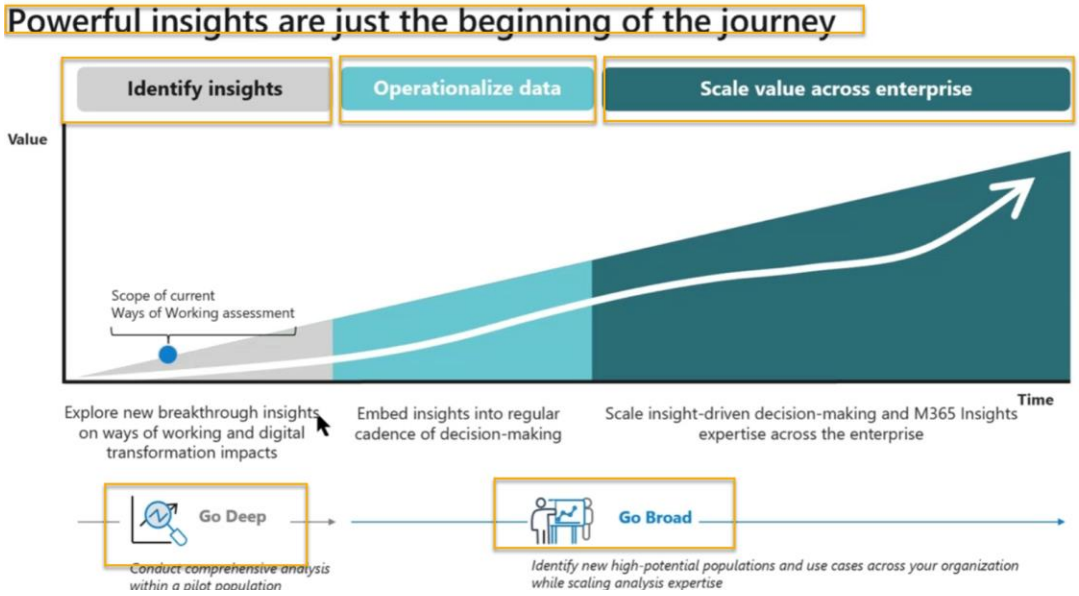
After hour collaboration time



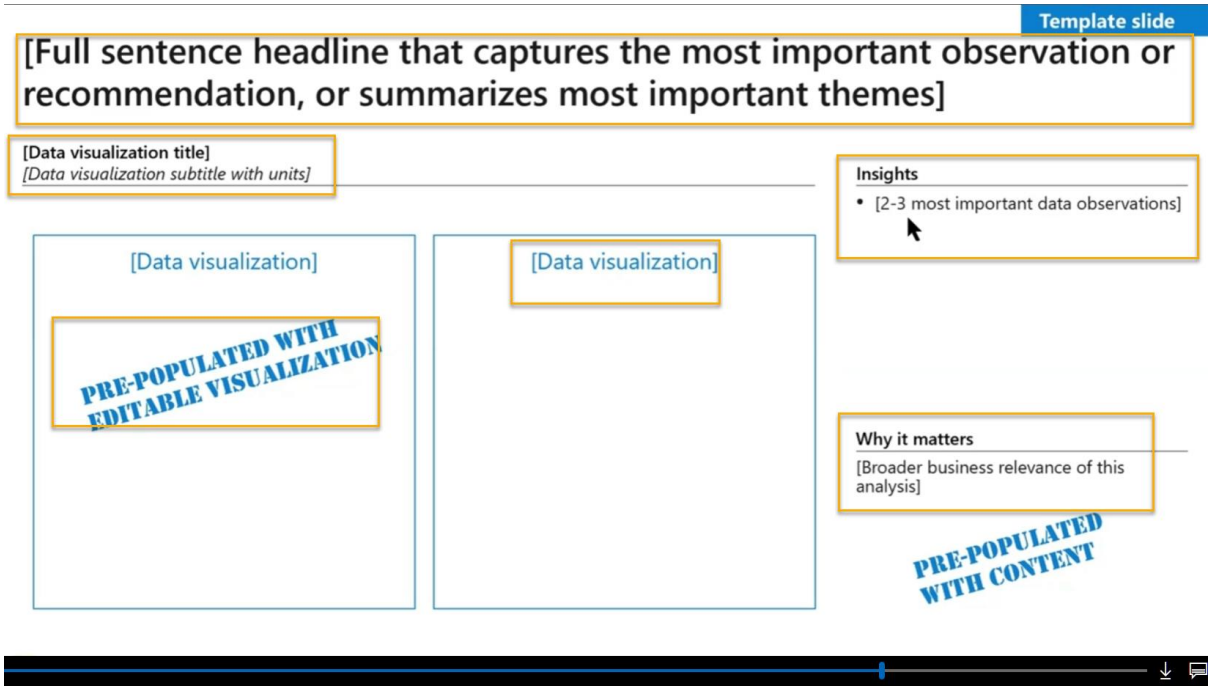
Next steps



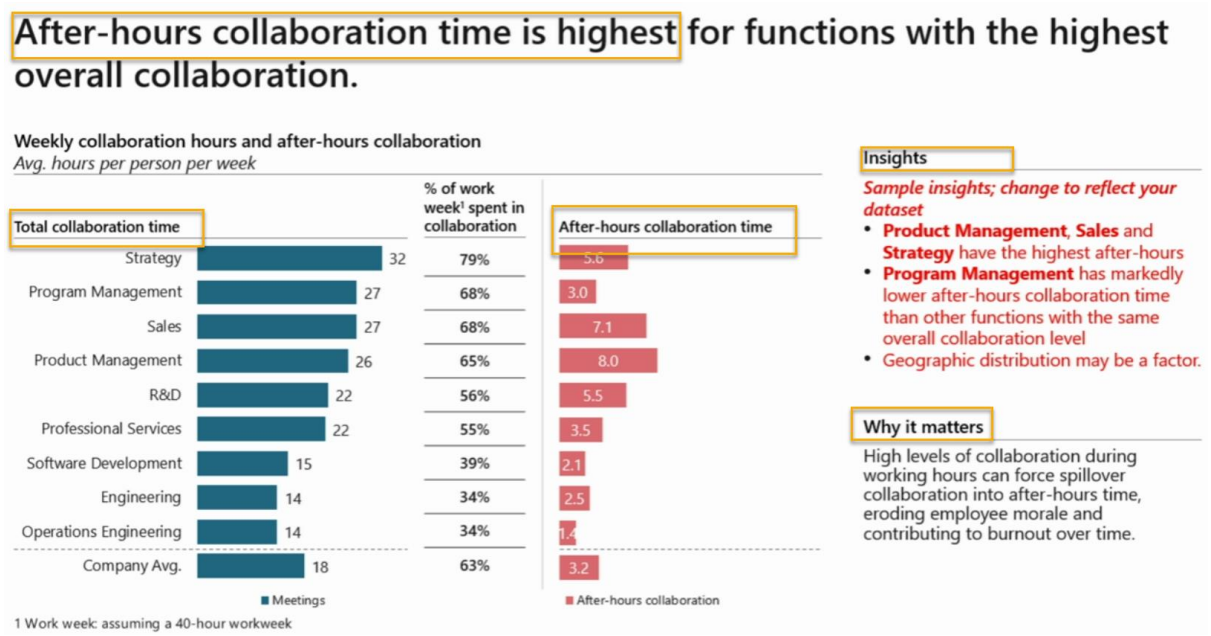
Powerful insights are just the beginning



Template slide



After-hours



Complete the Ways of Working assessment exercise (Microsoft Learn)

Discover Workplace Analytics with Microsoft Viva Insights

- 52 min
- Module
- 6 Units

4.8 (247)

Rate it

Beginner

Business Analyst

Microsoft 365

Workplace Analytics

Note: The Workplace Analytics web app is being rebranded to **Viva Insights** in the next few months. As mentioned in this module, **Workplace Analytics refers to the web app** with *advanced analysis* tools and accelerators available to those who are assigned **the Analyst, Limited Analyst, or Admin role.**

Learn what Microsoft **Viva Insights** (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 behaviours** in your organization.
- Discover **the sources of data used in Workplace Analytics**.
- Explore the **high-level insights available** through Workplace Analytics for Viva Insights.
- Create **custom analysis with Workplace Analytics.**
- **Summarize tasks** and considerations for setting up **Workplace Analytics** and managing privacy.

Learn about Workplace Analytics with Viva Insights

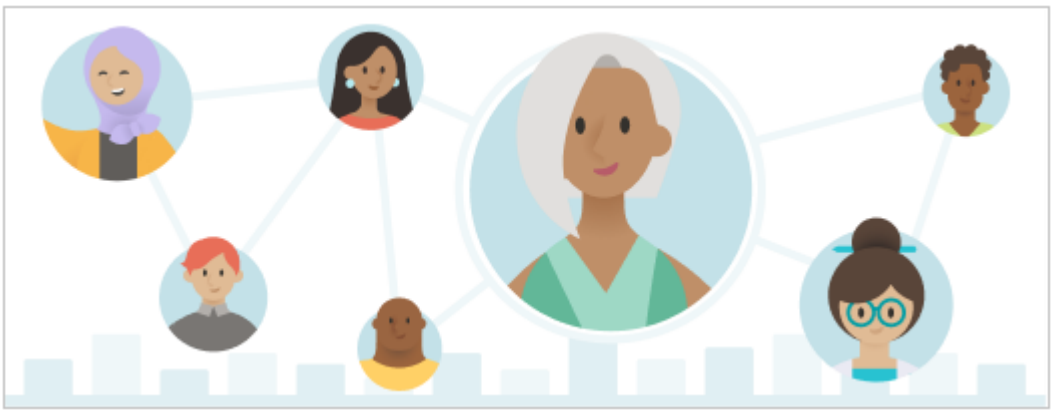
Completed100 XP

- 5 minutes

Note

*The Workplace Analytics web app is being rebranded to **Viva Insights** in the next few months. As mentioned in this module, Workplace Analytics refers to the web app with advanced analysis tools and accelerators available to those who are assigned the Analyst, Limited Analyst, or Admin role.*

Successful organizations track their business outcomes, but how do you **measure the day-to-day actions** that create those outcomes? **Collaboration is a key component** of knowledge worker success.



- Employees work through **networks**, **interacting** with **co-workers** and **leaders**. With Microsoft 365 data, you can measure these interactions.

- **Microsoft 365 captures signals** from
    - meetings,
    - email,
    - Teams calls, and
    - messaging activities.

      It's the **largest existing dataset** of how people **spend time at work**, passively generated from **everyday work activities**.

Workplace Analytics and Viva Insights provides visibility into:

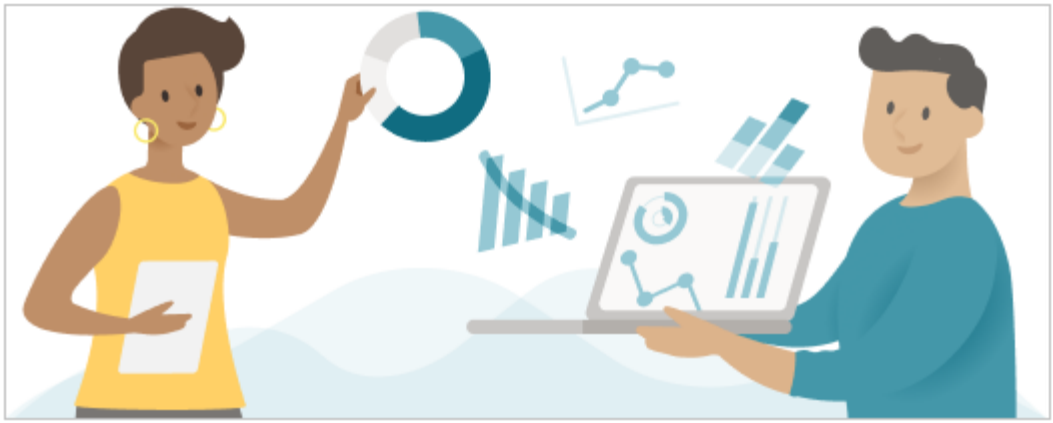
- How people **invest their time** through different **types of activities**.
- How they **share information** with **other individuals** in their team and beyond.
- How teams interact with **other teams, geographies, lines of business**, and **external contacts**.

This understanding can help organizations and their employees develop **stronger work habits** and **team norms** and do their **jobs more effectively**. But to turn the data into **insights**, **raw signals** need to be converted into **useful information**, as follows:

- Translate interactions into aggregate measures of **time** and **relationships.**
- Join collaboration information with contextual data about **employee** and **customer organizations, roles, geographies**, and **outcomes**.
- Provide options and controls to protect **individual privacy** while getting insight from the data.

- Workplace Analytics turns data into useful insights by providing **measures**, **context**, and **privacy controls**, as well as **dashboards** and other **tools** for access to those **insights**.

- It's a **cloud-based solution** that uses the power of **Microsoft 365 collaboration data** to provide actionable information into how **your organization spends its time**.



Workplace Analytics helps **decision makers identify opportunities** to effectively execute **change** and improve **organizational outcomes**, such as:

- *Collaboration overload*
- *Manager effectiveness*
- *Sales productivity*
- *Employee engagement*

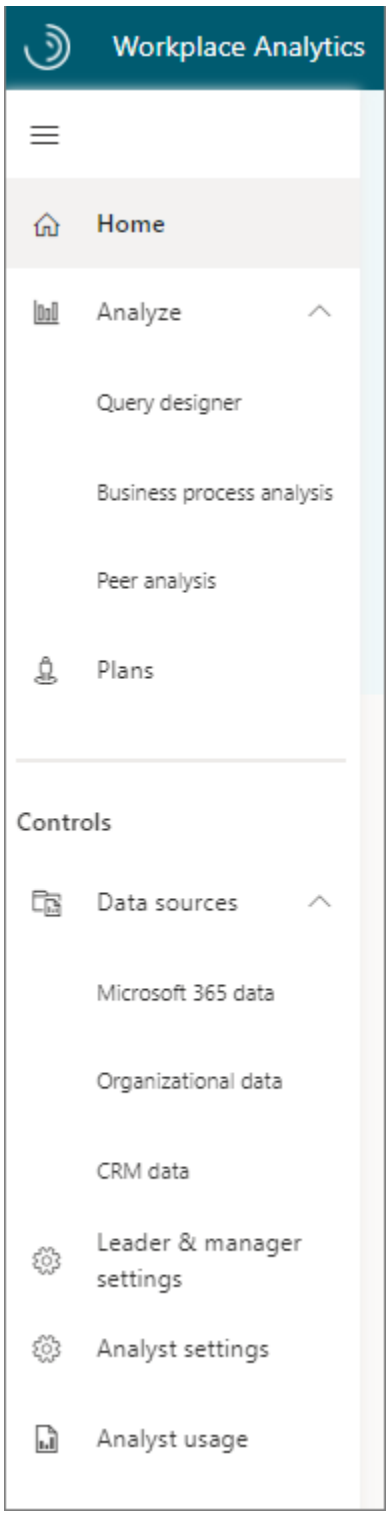
See how it works

Completed100 XP

- 9 minutes

Workplace Analytics users can analyze and explore the data in multiple ways:

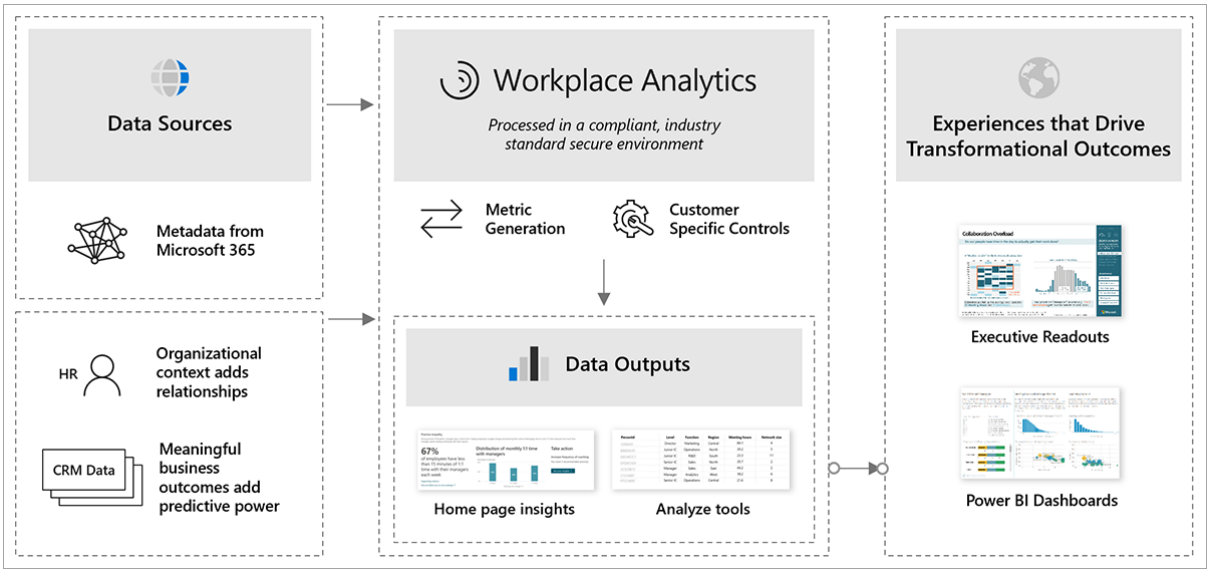
- The **Home** page shows high-level insights about your organizational data, with recommendations and options for in-depth analysis about research-based behavioural outcomes.
- The **Analyze** page enables more in-depth analysis with the **Query designer, Business process** analysis, and **Peer analysis** features.
- The **Plans** page works with **personal insights**, where available, to show targeted suggestions to help improve **focus, collaboration, wellbeing, and sales success**.
- The pages in the **Controls** section allow you to validate your **data sources,** define **leader** and **manager settings**, and define the analyst settings for **system defaults, privacy**, and **meeting** and **attendee exclusions.**



Note

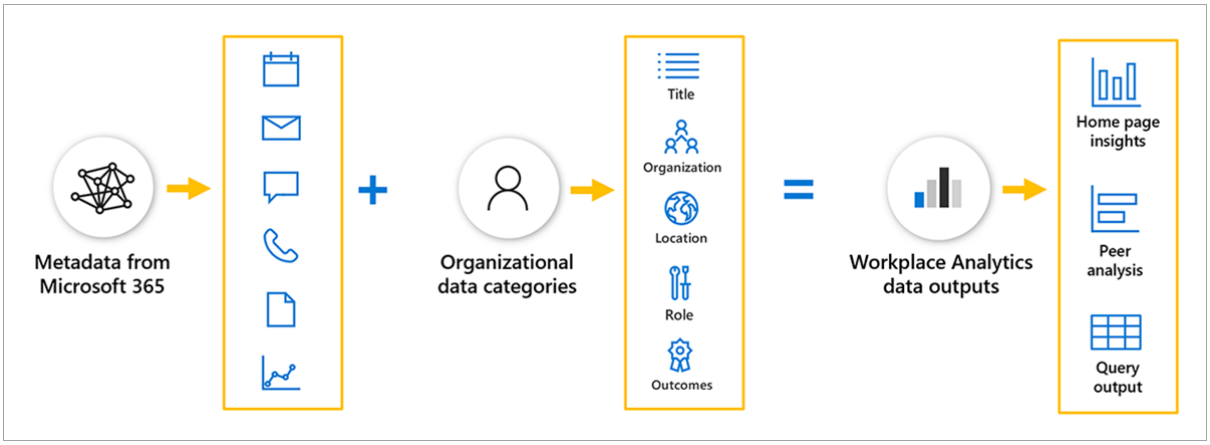
Select the **menu** (top) icon in the left navigation to toggle whether to show or hide the menu names.

The following shows how you can use these outputs to create executive presentations and business intelligence tools to drive transformational outcomes.



Data sources

- What's under the hood? Workplace Analytics processes collaboration data from **Microsoft 365**.
- It then maps descriptive employee attributes, usually from the organization's **human resource information system** (HRIS) with the **collaboration data**.
- The following shows this process:



- The descriptive employee attributes from HRIS are known as **organizational data** in Workplace Analytics.
- This **organizational data** is uploaded by the **Workplace Analytics admin**.
- Because **employee roles** and positions **do change**, analysts can get more accurate information when this data is updated **monthly** or **quarterly**.
- You can use **organizational data** to **group** and **filter** employees and understand how behaviours correspond to **employee attributes**.

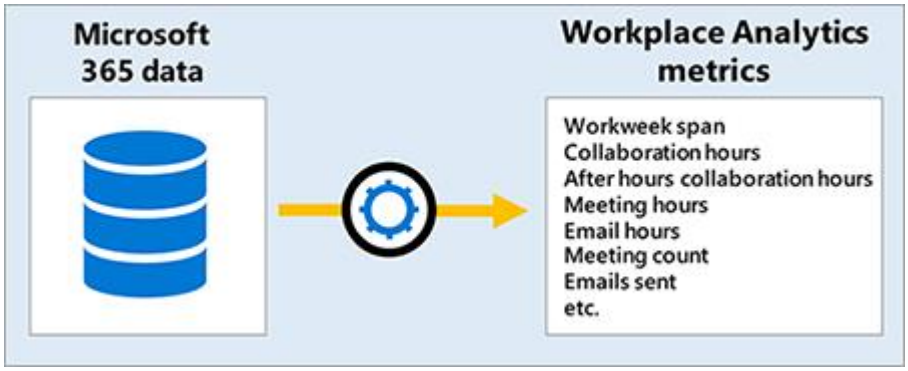
- **Workplace Analytics** only requires a few basic **organizational attributes**, but the more data your admin adds, the more value added for analysis.

- When Workplace Analytics processes collaboration data from Microsoft 365, it only **processes metadata**. Metadata is information **about** collaboration, like when and where items are sent (to and from), subject lines, and meeting attendee status. Workplace Analytics uses this **metadata** to generate metrics related to
    - **email usage,**
    - **meetings,**
    - **Teams instant messages, and calls.** The collaboration data refreshes weekly.

Workplace Analytics joins the **organizational data** to the **collaboration data** to generate its data model for out-of-the-box insights and analysis.

Organizational metrics

After the **data sources** are processed, employee data is **de-identified** and filtered, creating a **large library of behavioural base metrics** related to **workplace behaviours**, **time use**, and networks.



The **Home** page is a high-level look at these metrics within **the top business outcomes** for visibility into how work gets done.

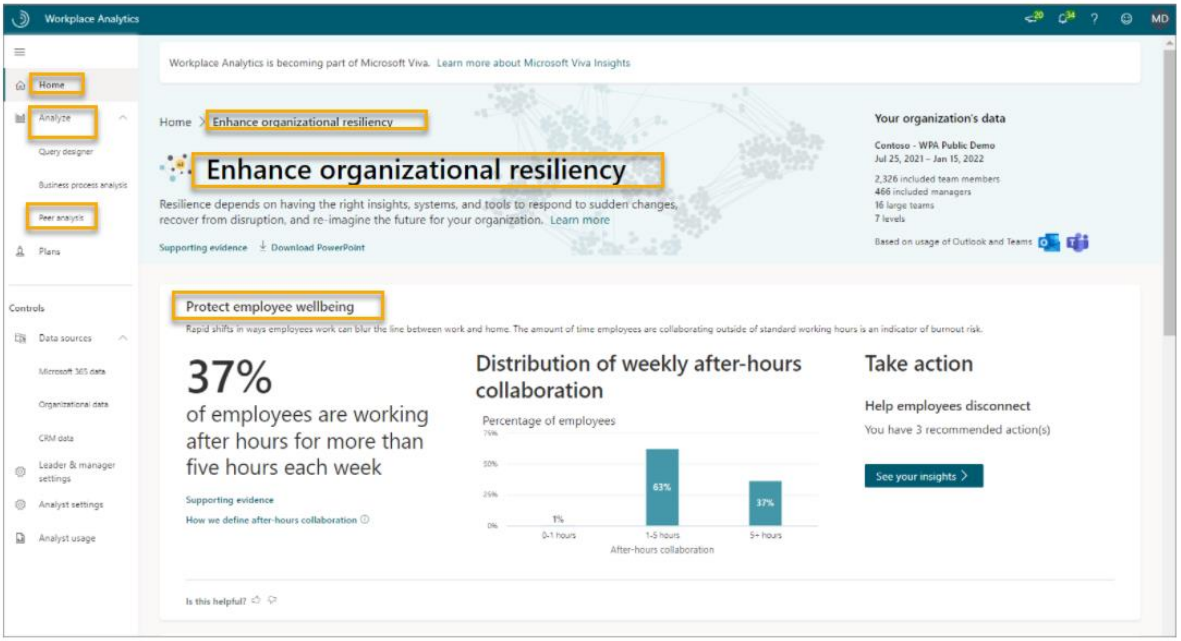
Peer analysis compares **base metrics between groups**, allowing you to use **organizational attributes to filter each population**. The Query designer allows you to go one step further and customize base metrics. For example, measuring "**recurring meeting hours**" as compared to the base metric of "meeting hours."

See Learn more for links to the metric descriptions and the glossary for more details about what metrics are used in Workplace Analytics.

Analysis outputs

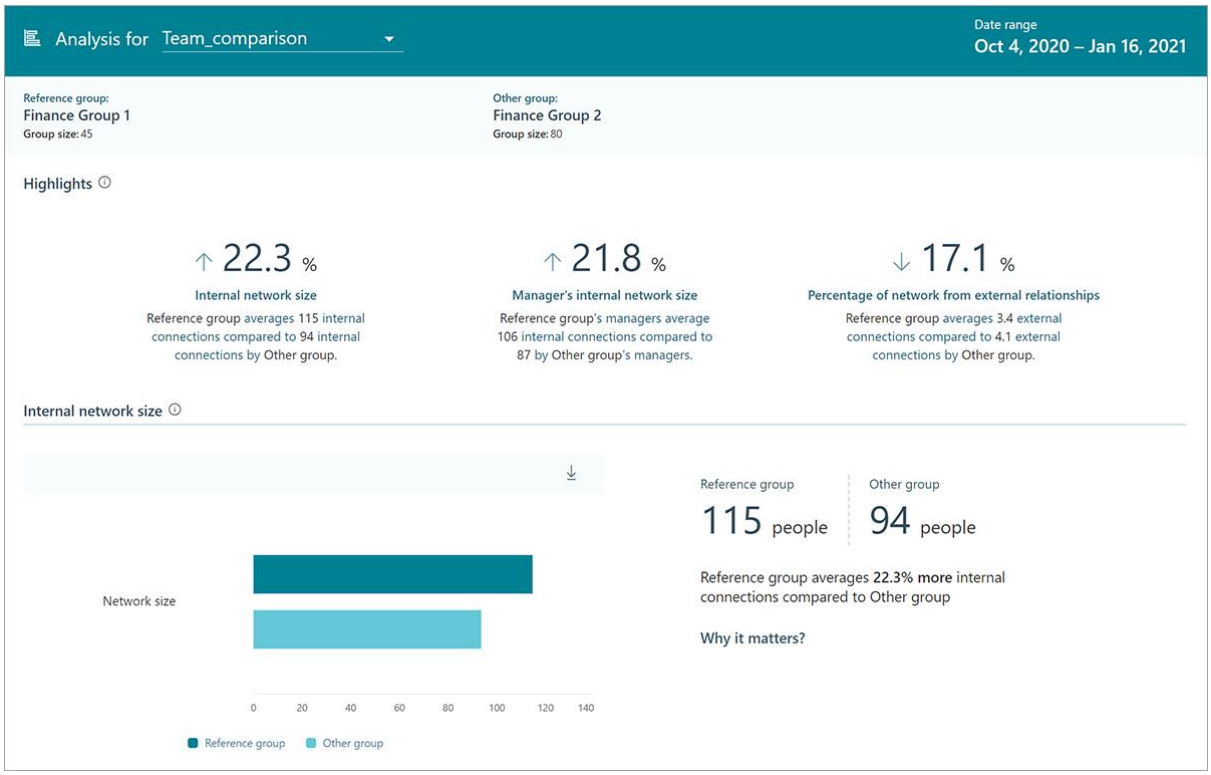
Each themed business outcome on the **Home** page leverages multiple key indicators to offer views of how work happens, with links to further explore the stats and evidence-based suggestions on how to drive change for business success.

The following is a snapshot of the **Protect employee wellbeing** view, which can be found by selecting the **Enhance organizational resiliency** outcome.



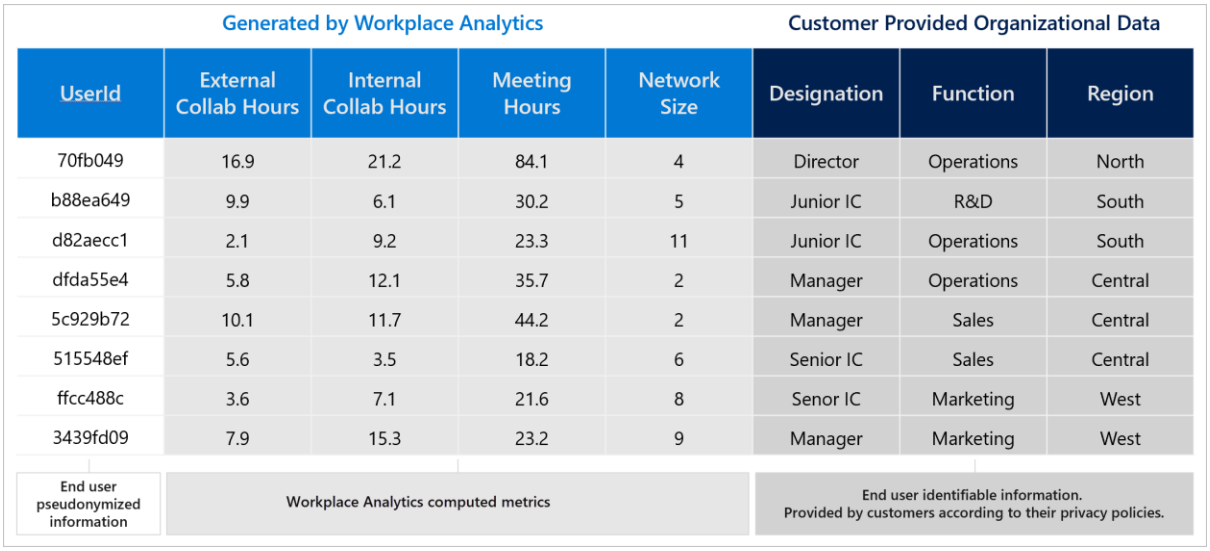
Peer analysis helps you discover differences in **collaboration behaviour** between **groups**.

The following is an example of **Peer analysis** output that highlights the metrics with the most **variation** and **charts** that compare metric averages between groups.



Query designer gives you access to **row-level data** and **customizable metrics**.

The following is an **example of query output with organizational attributes** (level, function, and region) and other related metrics (external and internal collaboration hours, meeting hours, and network size).



Generated by Workplace Analytics					Customer Provided Organizational Data		
UserId	External Collab Hours	Internal Collab Hours	Meeting Hours	Network Size	Designation	Function	Region
70fb049	16.9	21.2	84.1	4	Director	Operations	North
b88ea649	9.9	6.1	30.2	5	Junior IC	R&D	South
d82aecc1	2.1	9.2	23.3	11	Junior IC	Operations	South
dfda55e4	5.8	12.1	35.7	2	Manager	Operations	Central
5c929b72	10.1	11.7	44.2	2	Manager	Sales	Central
515548ef	5.6	3.5	18.2	6	Senior IC	Sales	Central
ffcc488c	3.6	7.1	21.6	8	Senor IC	Marketing	West
3439fd09	7.9	15.3	23.2	9	Manager	Marketing	West

Query output is available as a **downloadable .csv file** or as an *OData link* that can be loaded into other business intelligence tools, such as **Power BI** for impactful reports and presentations. For some queries, you can also visualize the results directly in **Workplace Analytics**.

Explore Viva Insights with Workplace Analytics

Completed100 XP

- 10 minutes

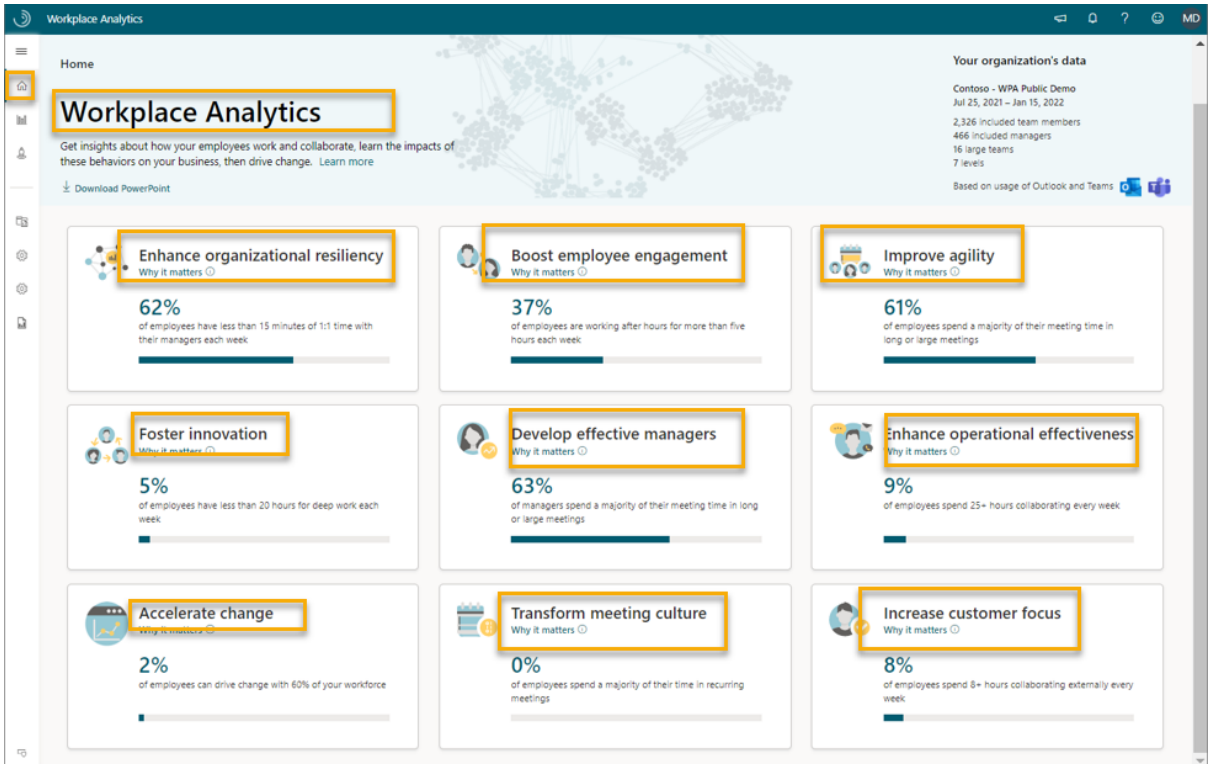
Workplace Analytics has high-level insights about how your employees spend their time, with recommendations and analysis to empower leaders to drive positive change.

Home

The **Home** page shows **leadership insights** about the most **popular business outcomes**. Each outcome has a **high-level insight** based on your specific organizational data, with links to supporting evidence and more in-depth analysis. Leadership can use these insights to quickly identify work patterns requiring further investigation.

At the top right, **Your organization's data** shows the date range and the number of measured employees that are included in the analysis. **Measured employees** are assigned a Workplace Analytics or Viva Insights license.

Scroll down to see all of the themed business outcomes.



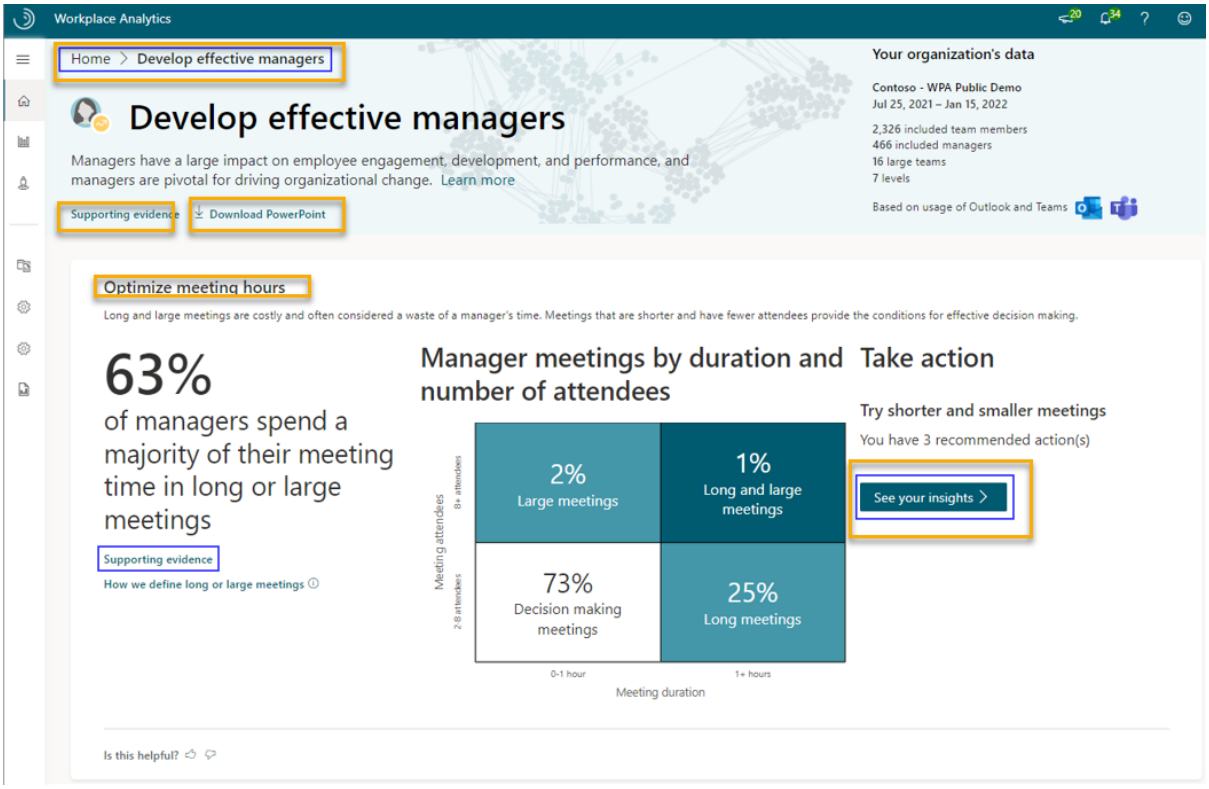
Note

This analysis reflects a rolling window of **the six most recent** months of weekly collaboration data.

The following business outcomes are shown on the Home page:

- **Enhance organizational resiliency** - Discover ways to prepare your organization to respond to **sudden changes, recover from disruption, and prosper**.
- **Boost employee engagement** - Identify opportunities to **promote job satisfaction and sense of belonging.**
- **Improve agility** - Assess metrics related to **your organization's ability** to quickly adapt.
- **Foster Innovation** - **Uncover if employees have enough time for deep work** and are effectively sharing information **to generate new ideas**.
- **Develop effective managers** - Investigate **how managers collaborate to improve employee engagement, development, and performance**.
- **Enhance operational effectiveness** - Improve collaboration **habits to transform organizational productivity.**
- **Accelerate change** - Leverage **influential groups to drive change** in your organization.
- **Transform meeting culture** - **Explore and optimize meeting habits** to reduce **collaboration overload** and **promote wellbeing**.
- **Increase customer focus** - Target behaviours that **engage employees** and **prioritize customer relationships.**

Select any of the business outcomes to see high-level analysis based on the key leading indicators. The following example is a glimpse into the **Develop effective managers** outcome.



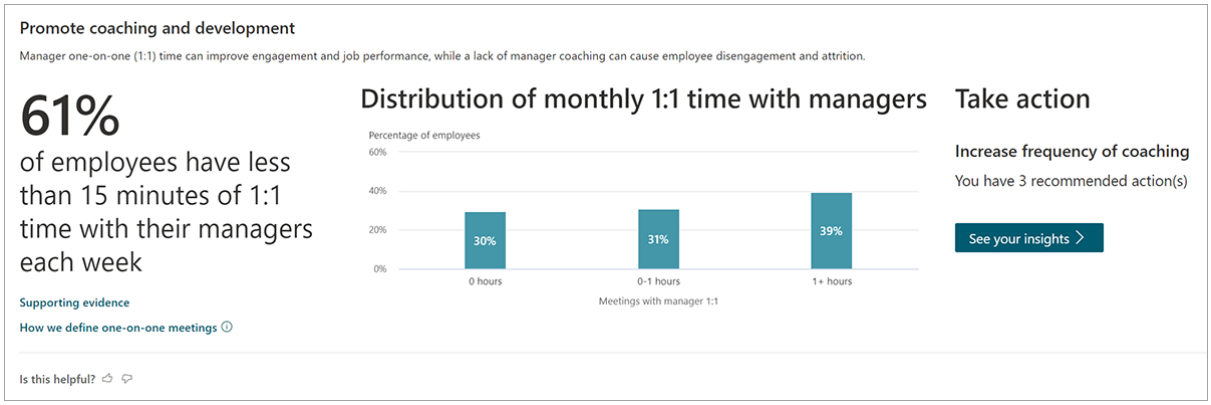
For additional resources and analyses, you can explore the following links:

- **Supporting evidence** - Get links to **research articles** and related information about **organizations** who have successfully used Workplace Analytics.
- **See your insights** - **Get recommendations** and deeper analysis to **drive positive changes** in your organization.

Home page insights example scenario

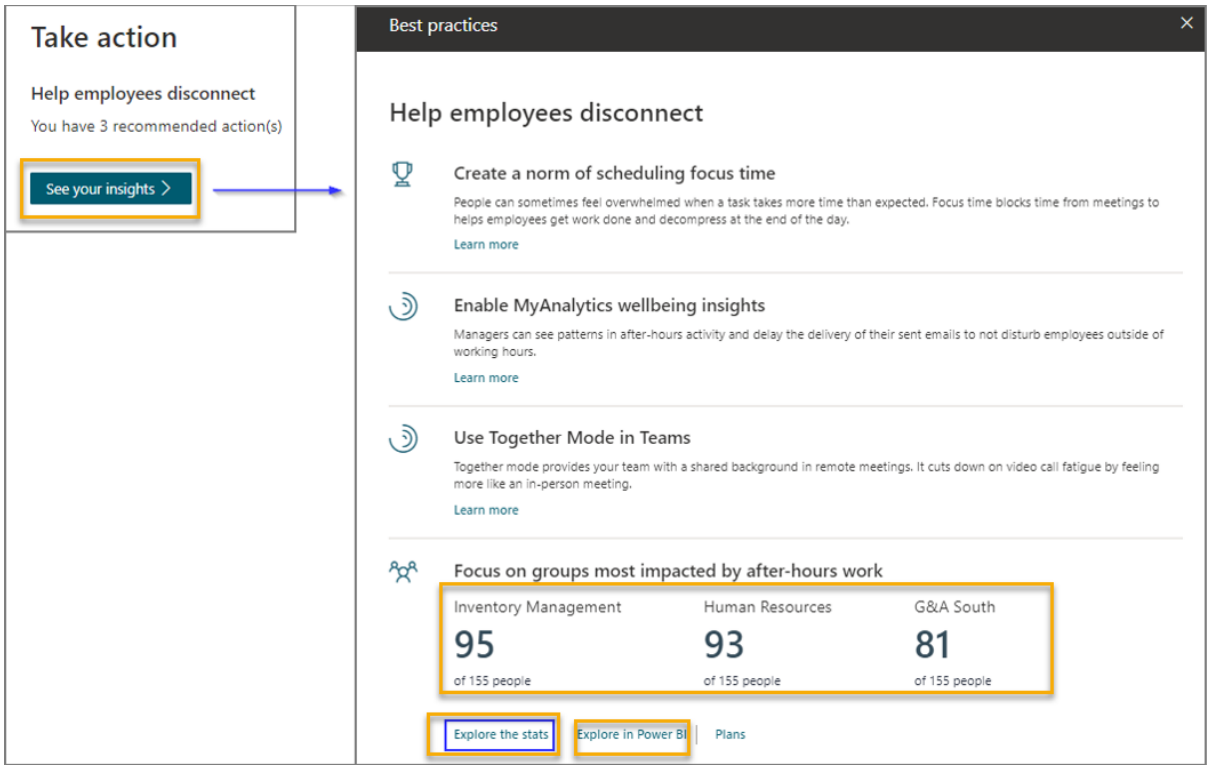
- You are an **HR executive at Contoso Corporation** and have been asked to work with your team to determine **if managers** are **spending enough** time **developing employees** in the organization.

- Using Workplace Analytics, you navigate to the Home page, select the **Develop effective managers** outcome, and scroll down to the **Promote coaching and development** insight. There, you find that over **60 percent of employees** at Contoso get **less than 15 minutes of one-on-one time** with their manager in a month, indicating a need for **more coaching**.



- In the **Take action** section of the insight, you can select **See your insights** to see impactful next steps you can take to drive change in your organization.

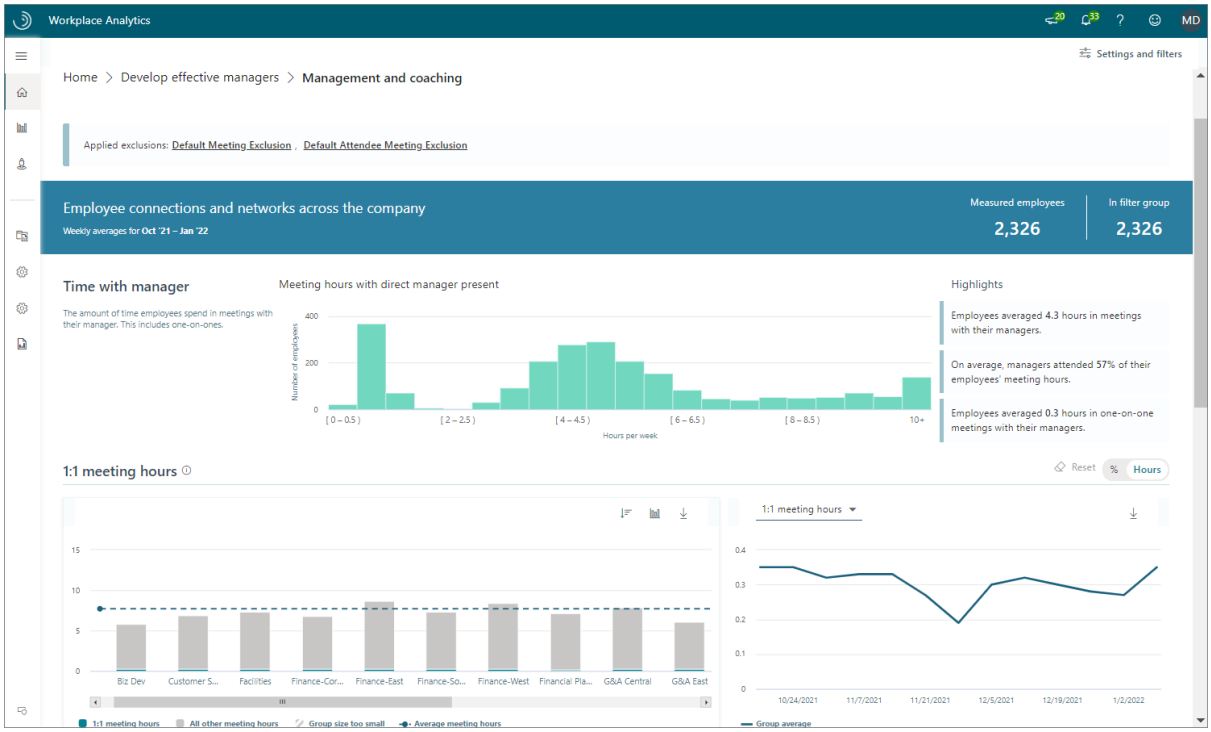
- For example, in **Develop effective managers > Increase frequency of coaching > See your insights**, you'll see recommendations, such as scheduling recurring one-on-one meetings, and groups that could benefit the most from these recommendations. This example also provides a link to **Explore the stats** for more analysis.



Note

In addition to recommendations in the **Take action** section, you might also see links to **Explore the stats**, **Explore in Power BI**, or the option to create **Plans** and track their success. The combination of these depends on the insights and your assigned role.

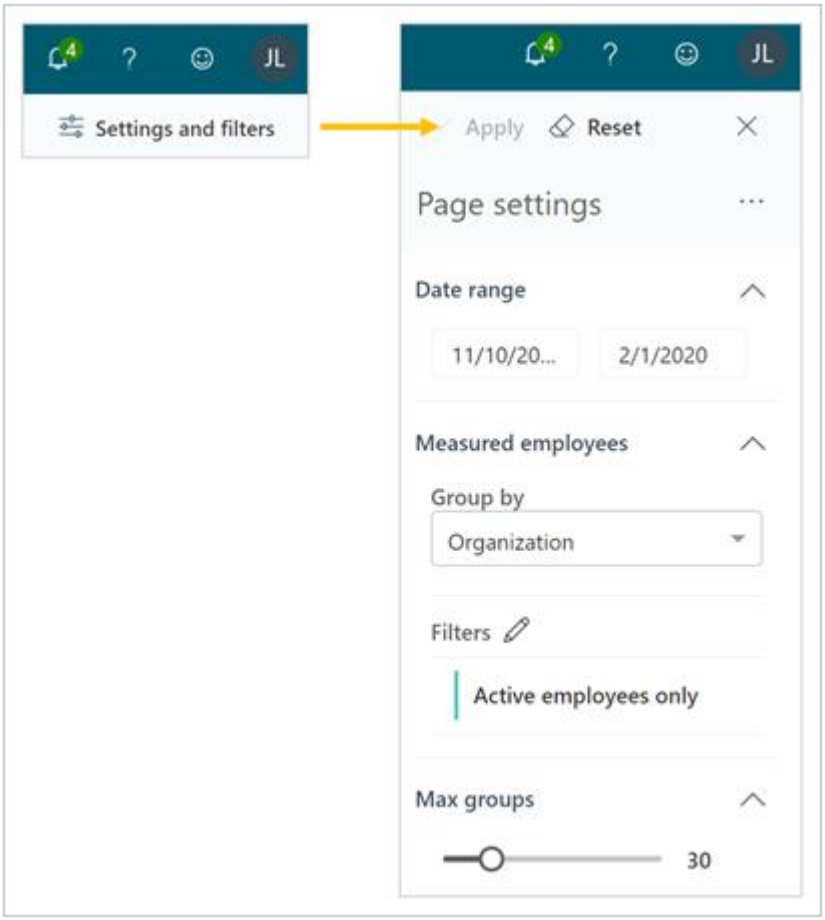
Explore the stats is a quick way to look at metrics summarized by groups over time. While the Home page shows high-level insights related to business outcomes, **Explore the stats** cover a wider range of metrics.



Note

Explore the stats analysis reflects a **rolling window** of the **six most recent** months of weekly collaboration data.

Within the **Explore the stats dashboards**, you can change the filters and settings for the data shown on the page. At the top right of the page, select **Settings and filters** to open **Page settings**. In Page settings, you can change the date range of the data, how the measured employees are grouped, add filters, and change the maximum number of groups shown in the data.



Explore the stats example scenario

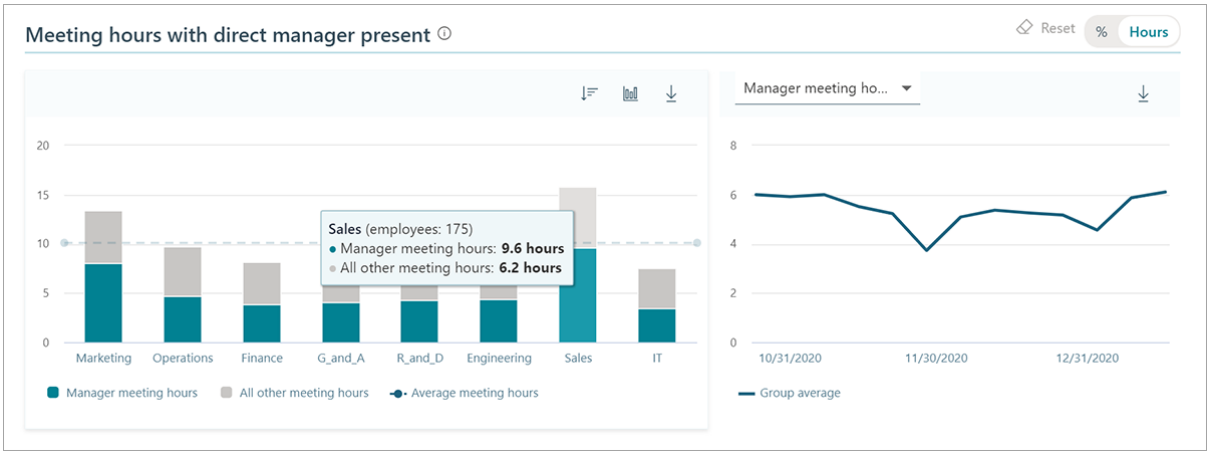
- As an **executive on the HR team**, you learned from a recent engagement survey that some employees at **Contoso are not feeling empowered** in their work.

- You decide to dive deeper into metrics relating to **manager-employee relationships** to investigate **opportunities for improving manager effectiveness.**

- In **Develop effective managers** > **Promote coaching and development** > **See your insights**, you select **Explore the stats** to view the **Management and coaching** dashboard.

- You would like a **recent snapshot of the data**, so in the upper right corner of the dashboard, you confirm the date range in **Settings and filters** is set to the last three months, group by **Organization**, and select **Apply**.

- In the **Meeting hours with direct manager present** chart, you notice that over half of the **Sales group's meeting time** includes their manager, indicating an opportunity to simultaneously empower employees through delegation and free up manager time for strategic tasks.



Create custom analysis with Workplace Analytics for Viva Insights

Completed100 XP

- 16 minutes

You can customize analysis in a multiple of ways with Workplace Analytics.

Workplace Analytics Analyze page

In addition to the business outcomes and associated insights on the Home page, there are two main ways of analyzing data in Workplace Analytics**: Peer analysis** and **Query designer**.

Query designer

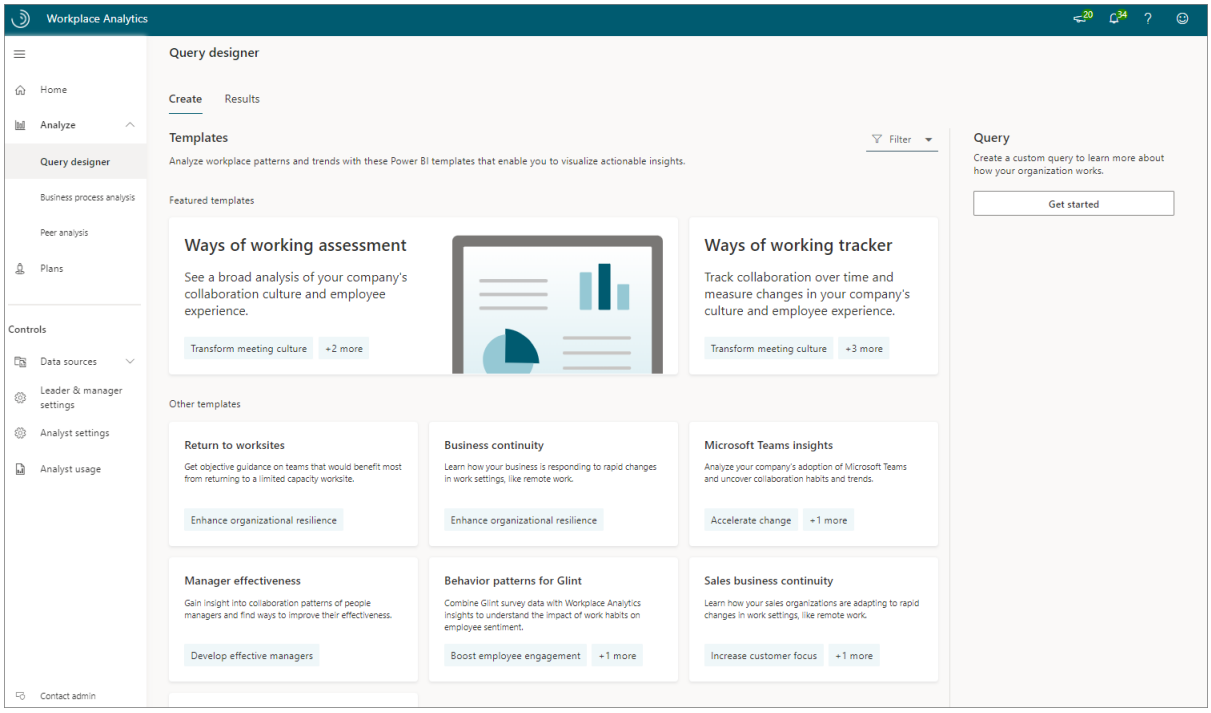
In **Templates**, you can select from a *list of predefined templates with preselected filters and metrics*. These are a great starting point for specific analysis, yet give you the flexibility to add new metrics and customize them, as needed.

Most of the templates are designed for Power BI with a download option to set up automatically refreshed reports **in Power BI through an OData link**. The setup for the predefined templates vary depending on what's required for setting up its **Power BI dashboard**. Select the template you'd like to use in Power BI dashboards for more details about setup and how to use them in Power BI.

Queries in the Query designer give you access to **row-level data** and **customizable metrics**. You can import the row-level data into other analysis tools to create custom analyses, models, and dashboards.

The most common query types include:

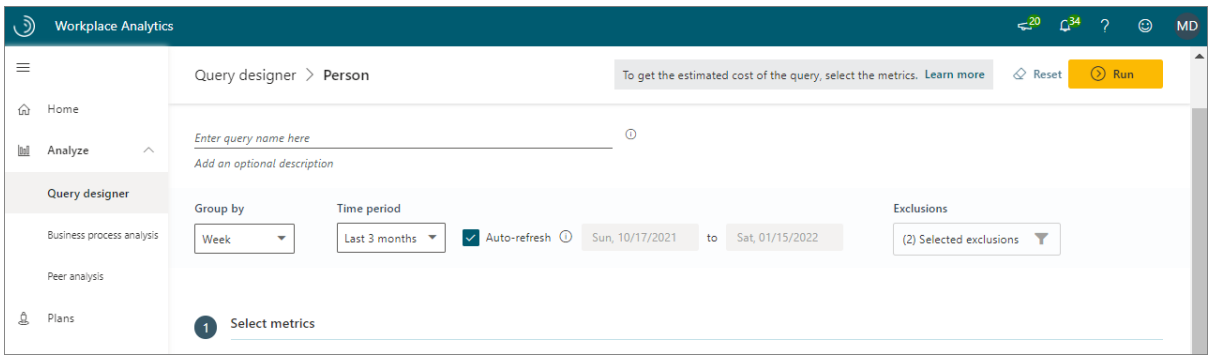
- **Person query** - Extract person metrics for analysis of aggregated **employee** data.
- **Meeting query** - Extract meeting-related metrics for analysis of aggregated **meeting** data.



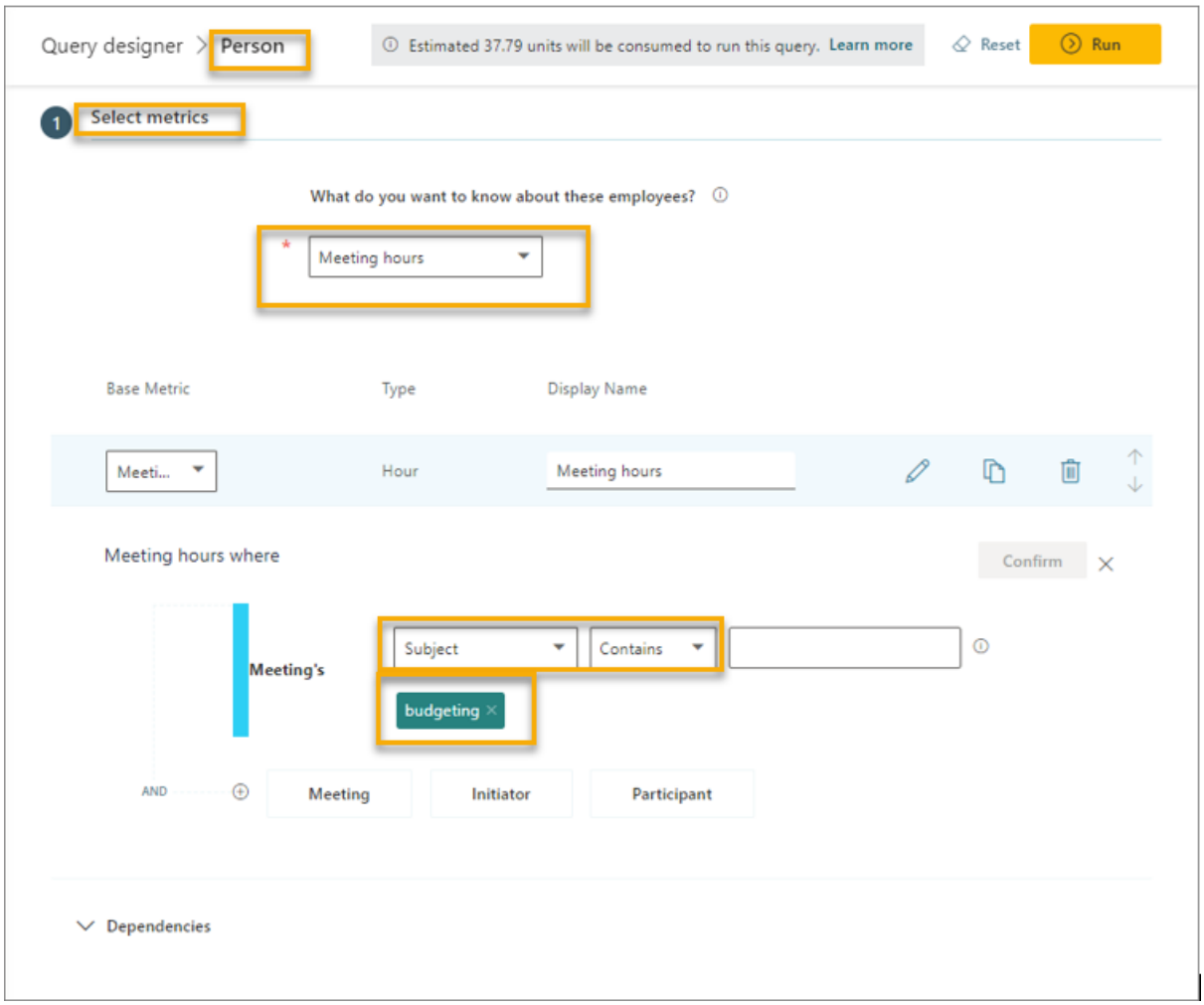
Queries report the same underlying data, but the type of query determines the structure of the output. For example, each observation in a **Person query represents a person**, their measured collaboration, and their descriptive attributes. Each observation in **a Meeting query represents** a meeting, its attributes, and the total collaboration associated with the meeting attendees.

Query steps

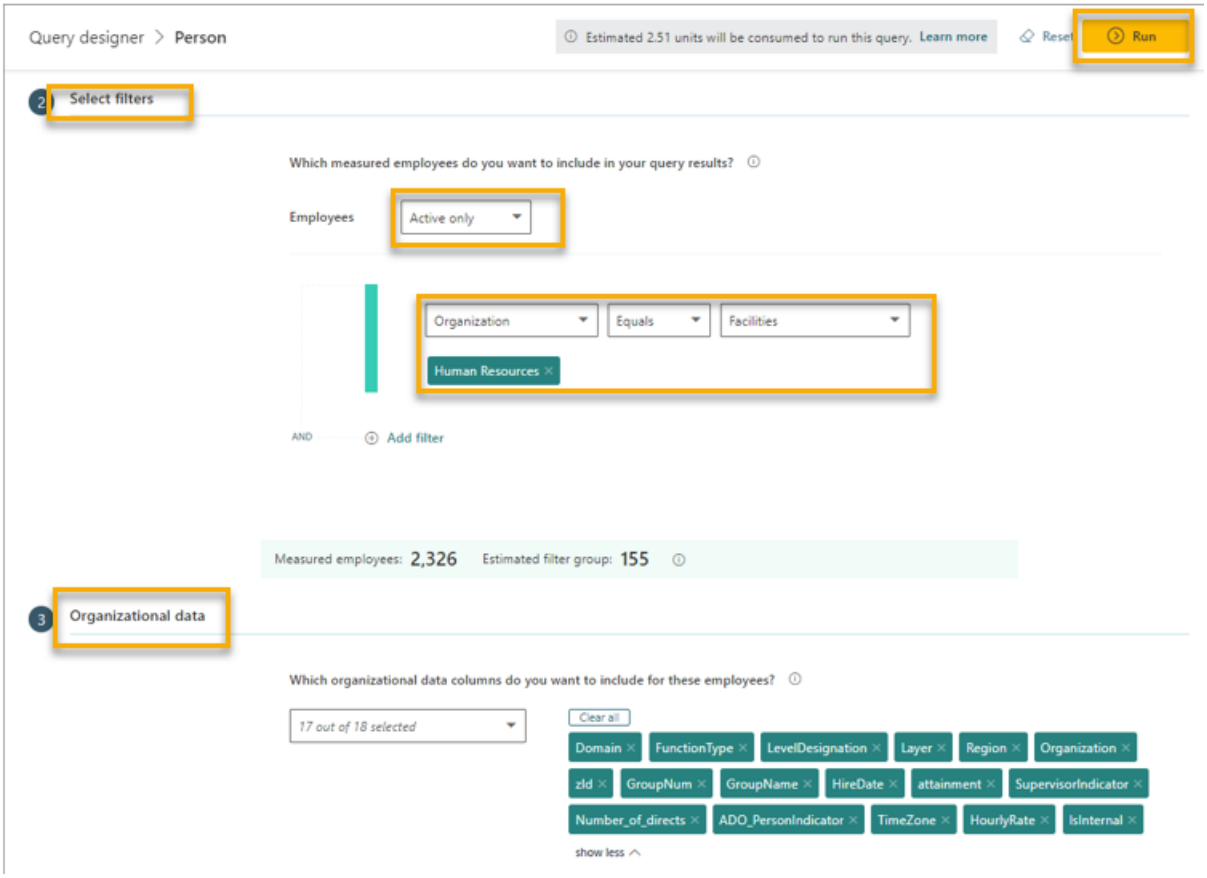
1. Open the Query designer.
2. Select **Get started** under **Query**, and then select the query type, such as **Person** for this example.
3. Select **Start a new query**, and then select **Set up query**.
4. Enter a name and description for the query.
5. Select the **Group by** timeframe (day, week, or month), the applicable **Time period**, and if you want the query to **Auto-refresh**.
6. In **Exclusions**, select the meeting and attendee exclusions to exclude any irrelevant calendar activity from this analysis.



7. In **Select metrics**, select what metrics you want to include from the list. You can also customize one or more metrics by using filters. For example, the following shows how to filter for meeting hours with the word "**budgeting**" in the **subject line.**



8. In **Select filters**, you can change the scope of the data you'd like to analyze by limiting it to **active employees** and applying **additional filters** to **organizational attributes**. In this view, we've applied a filter to look at the **Human Resources group at Contoso**. (Active employees are defined as employees who sent at least one email or Teams chat in a given week.)



9. In **Organizational data**, select which organizational attributes to include in your output, and then select **Run** (top right) to run the query.

10. In **Query designer** > **Results**, you can select to view only your results (My results) or all query results. Select the **Download** icon to download a query's results as a **.csv file** or to copy the OData link for loading the data into other **business intelligence apps** (such as Power BI). For queries that show the **Visualization** icon, you can also visualize the results directly from this page.

Business process analysis

Business process analysis can help you

- **identify seemingly well-defined** and
- **undefined business processes that have quietly grown** beyond their intended scope.

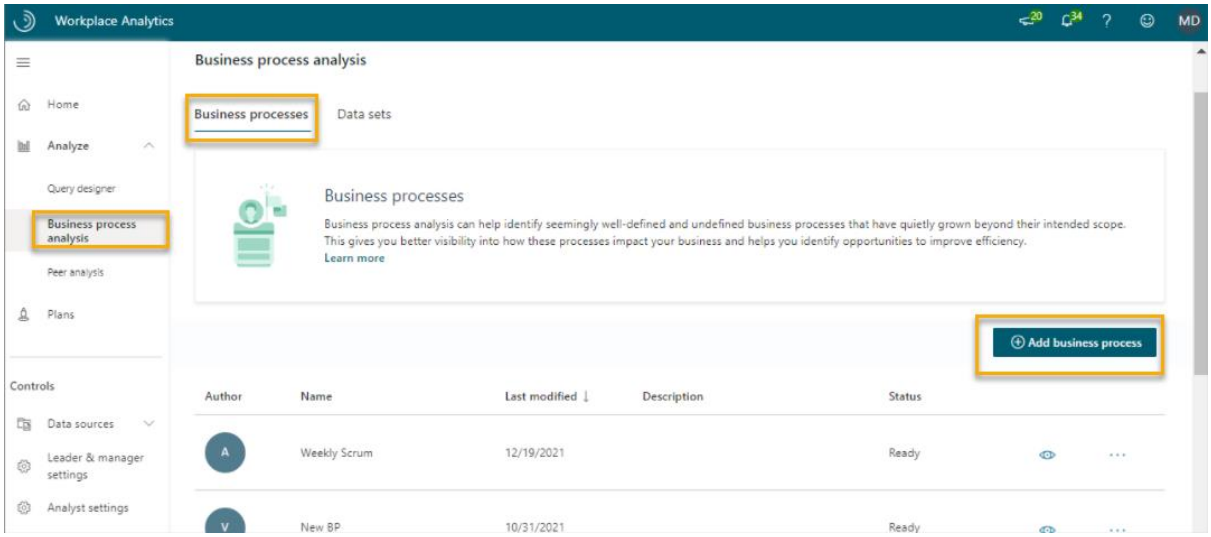
  This gives you better visibility into how these **processes impact your business** and helps you identify **opportunities to improve efficiency**.

To analyze a business process:

1. Define a dataset that only analyses the data that's relevant, such as organizationally and geographically.

2. Define a business process to analyze within the dataset that you defined in the preceding step.

3. Analyze a business process through a query where you select the business process as a parameter.

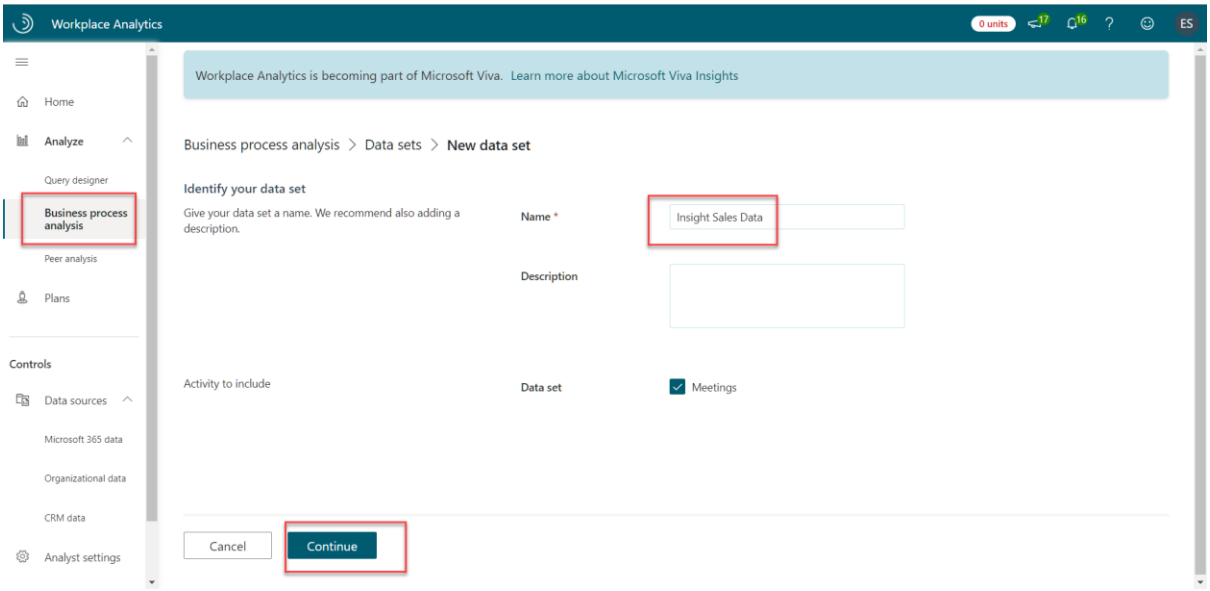


Define a dataset

- Before you can **analyze a business process**, you need to **create a dataset** for it.

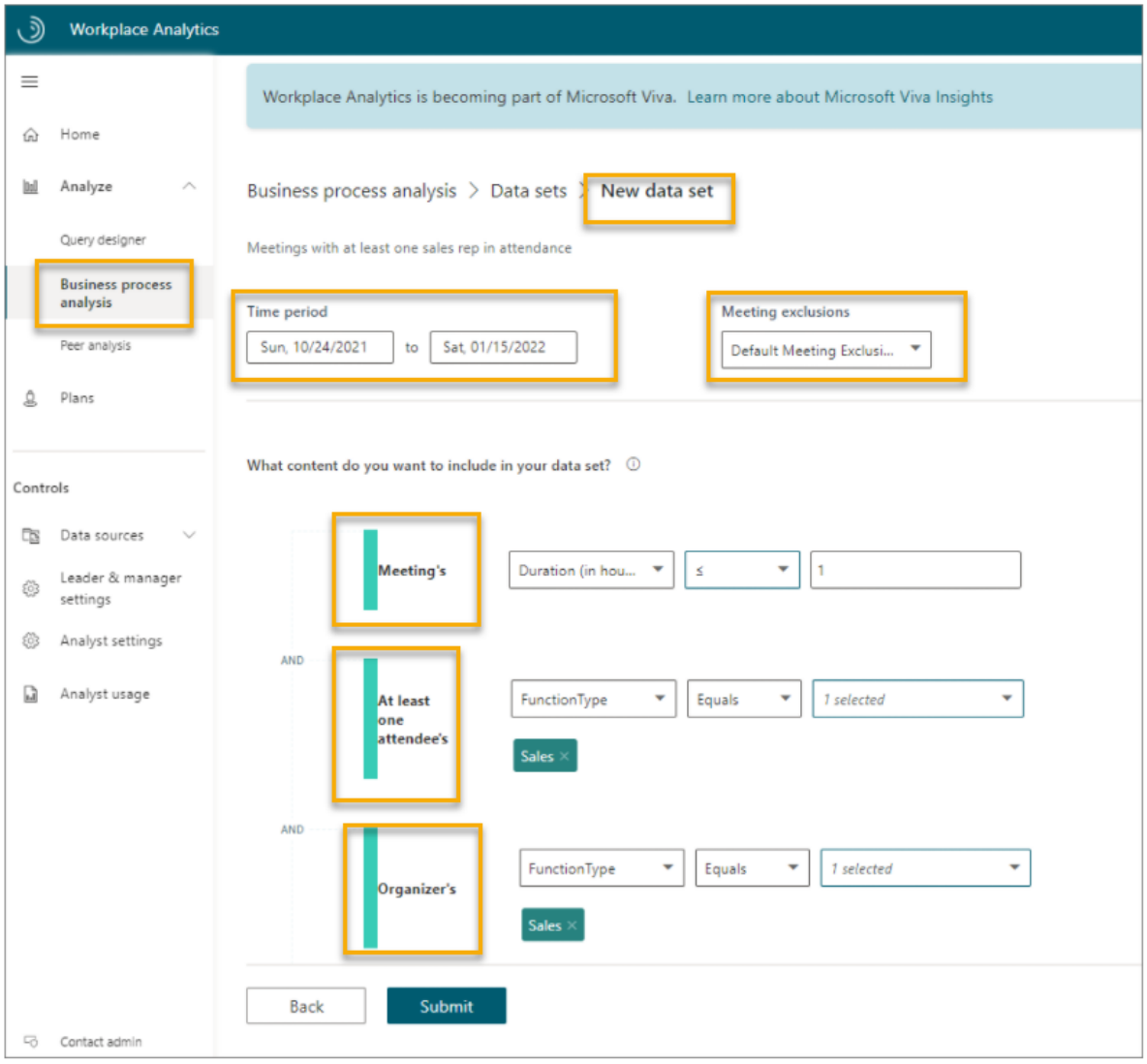
- Use the **Query designer** to create a query that **includes only the organizational** data required for this analysis. For example, the following steps define a query for meetings of a particular length that were attended by at least one sales representative.

1. Open Business process analysis.
2. Select **Data sets**, and then select **Add data set**.



3. In **New data set**, enter a name (for example, Sales data) and a description, and then select **Continue**.
4. For **Time period**, select the start and end dates. For this example, all meetings that occurred outside of this time period are excluded from the dataset.
5. For **Meeting exclusions**, specify a meeting exclusion rule or accept the default.

6. For **Which meetings do you want to include in your query results**, define the filters to scope the dataset for the analysis. For example, to filter out specific meetings, select **Add filter**, and then select **Meeting** with a **Duration** of less than or equal to one hour. Or specify the duration you want to analyze or don't define this filter if you want to include all meeting hours regardless of their duration.
7. Select **Attendee**, and then select the group (such as Sales) for the meeting attendees.
8. Select **Organizer**, and then select the group (such as Sales) for the meeting organizer.



9. Select **Submit** to create the dataset that matches these criteria (and no other data). The process time for the dataset varies depending on its size.

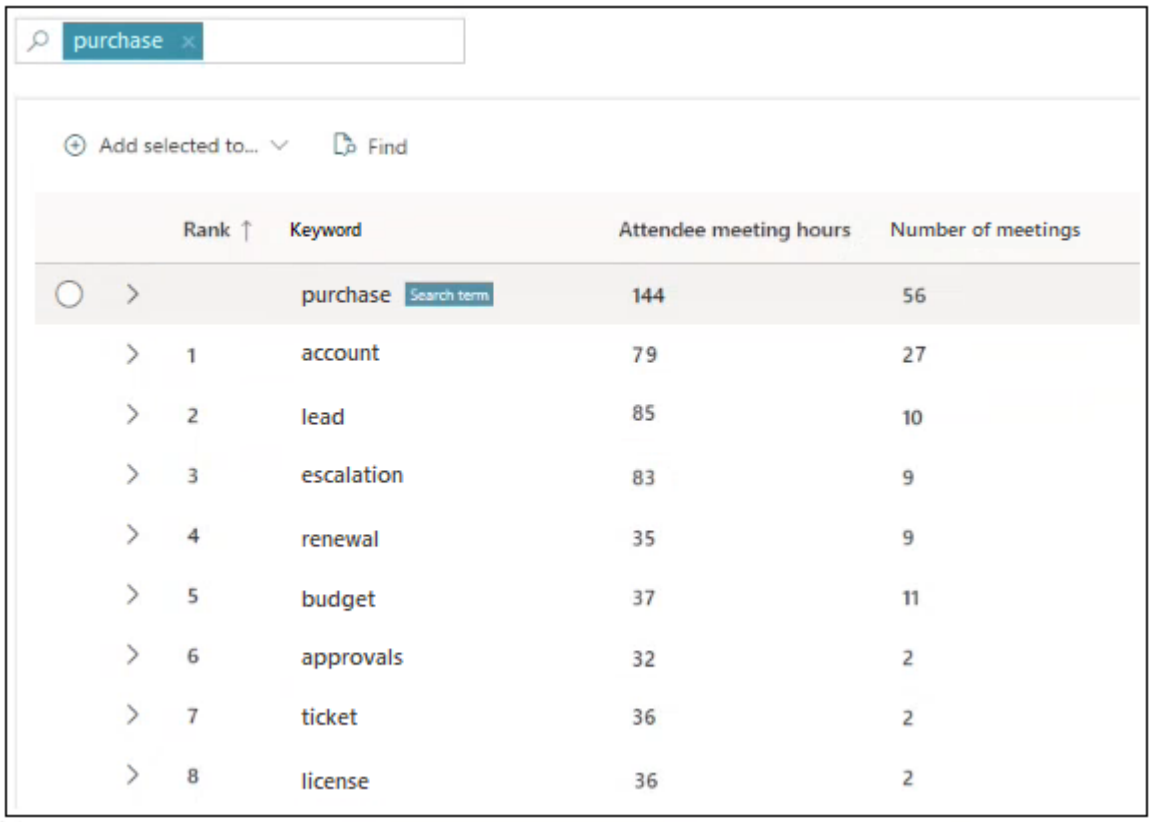
Define a business process

- Before you can **analyze a business process**, you need to define it.
- You do this **by assembling a list of keywords** that are typically found in the dataset that are associated with the process **you want to analyze**, such as in **meeting subject lines**.
- This list defines the business-process filter.

Note

Currently, you can only use **English keywords** for defining a business process, even when your instance of Workplace Analytics is in a language other than English.

1. Open **Business process analysis**.
2. Select **Add business process**.
3. In **New Business process**, enter a name and an optional description for it, such as **Sales interactions**, and then select **Continue**.
4. In **Data set**, select what to use for this analysis.
5. For **Content type**, keep **Meetings** selected, and then select **Continue**.
6. In **Enter a search term**, enter a keyword that represents a common term about this business process. The system then uses this to show you related words found in the dataset. For example, the following shows words related to **purchase**.



7. Optionally, you can sort the keyword columns by selecting a header in the table, such as **Rank**.

Note

The **Rank** column indicates relevance ranking. In the preceding image, a rank of **1** indicates the "account" keyword is the most relevant to the specified search term "purchase," which is similar to the ranking in a browser search.

8. Scan the words in the **Keyword** column to find what closely relates to this business process, such as "Sales activities." To confirm relevance, do the following:

- **Find related keywords** - Expand the keyword by selecting the **>** (greater-than) sign to see multiple-word phrases that include it. For each keyword, you can see the **Number of meetings** with this word in the subject line and the amount of time spent in those meetings (Attendee meeting hours).
- **View the meeting metadata** - Select a keyword to see a list of meetings with this word in the subject line, the number of attendees, and whether the meeting is recurring. If these meetings are relevant, select them.

9. After you decide that a keyword is relevant, hover your cursor over the keyword's row to see and select the checkbox to the left of the word. Then select **Add selected to**, and then select **Included keywords**.
10. After you include a term, you'll see it in the **Included keywords** list to the right of the results table.
11. Optionally, you can explicitly exclude terms from the keyword list by repeating these steps and select **Excluded keywords** in the previous step.

Note

As you add keywords, the system becomes more context-aware and will automatically start uncovering more content that's relevant to the keywords that you've added and will show them in the results list.

12. You might already know the keywords your company uses for a business process. To manually enter them, select **Included keywords** > **Add**, and then enter the keyword (or multiple words separated with a semicolon), and then select **Enter**. Similarly, for keywords you want to explicitly exclude, use the **Excluded keywords** option.
13. Confirm the totals at the top of the page that reflect meeting hours and meetings in the entire dataset. The smaller totals reflect the number of meeting hours and meetings in the data that are associated with the currently selected keywords. These smaller numbers change as you add or delete keywords. If you are familiar with the hiring process, these numbers could indicate that your defined keywords are too narrow (too few meetings and hours) or too broad (too many), after which you can adjust accordingly by adding or deleting keywords.

Note

If you're not finished, but want to save what you've entered so far, select **Save draft** to return later and resume where you left off.

14. Select **Submit**, which is only available when at least one keyword is listed in **Included Keywords**, to start the processing. You'll see **In progress** status during this phase.

Analyze a business process

You analyze real-world business processes by creating a query with metrics that filter by a digital business process to focus it on a set of collaboration activities, such as relevant meetings.

You can filter by business processes wherever the **Meeting** is available as a filter or a customizable metric. For example, the following steps use **Meeting** as an available filter.

1. Open the Query designer.

2. Select **Get started** under **Query**, and then select **Meeting** > **Next**.
3. Select **Set up query** and enter the initial information about it, such as a name, time period, and which exclusions to use.
4. In **Select filters**, select **Meeting**.
5. Select **Business process**, and then select an available business process. Only business processes with a **Ready** status are available.
6. In **Organizational data**, select **BusinessProcesses** as an attribute to include in the query.
7. Finish defining your query, and then select **Run**.

Interpret the results

- The meeting query results will include a **BusinessProcesses** column where each meeting row that matches the business process name will show it.
- If multiple business processes **match a single meeting**, this column will contain a **comma-delimited list of matched business process** names for the meeting.

For general information about query results, see View, download, and export query results.

Peer analysis

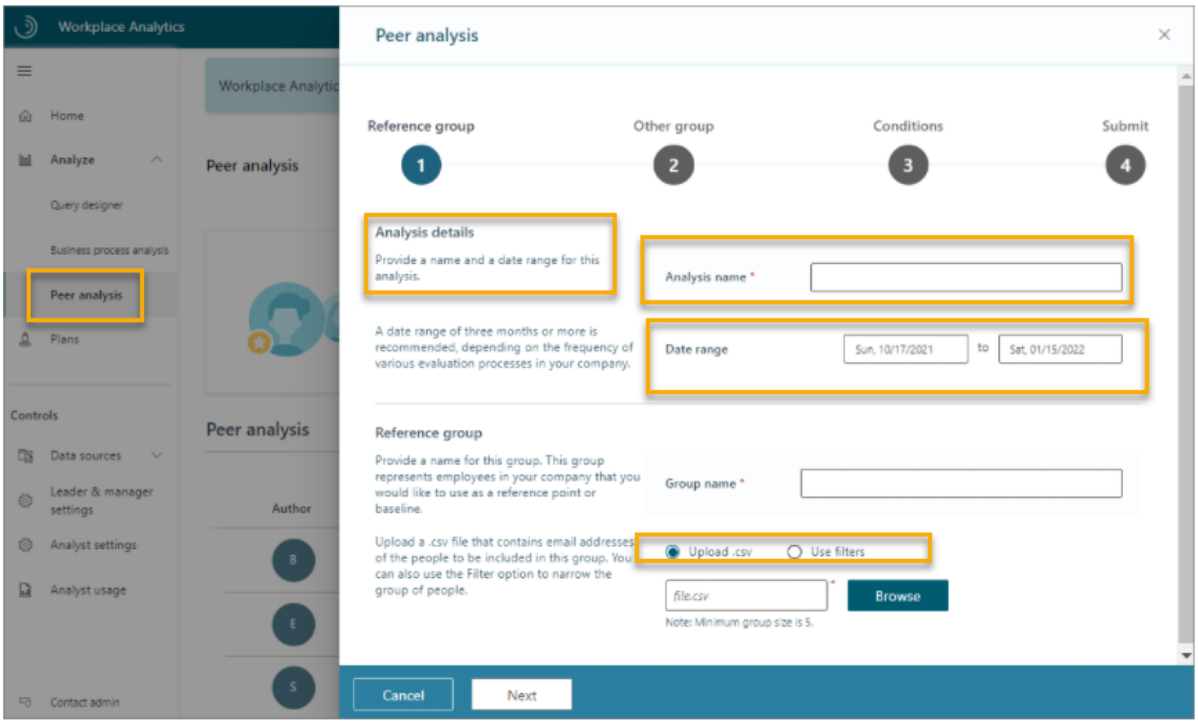
You can use **Peer analysis** to compare the collaboration behaviours of two different groups within your organization. This can help you understand how two teams in the same function work differently, or how work-life activities differ across the organization.

To create peer analysis:

1. Open Peer analysis in Workplace Analytics.
2. Select **New analysis**, select your **Reference group**, enter a name and date range for this analysis, and then enter a name for the reference group.
3. Identify the group members, as follows:
    - **Upload a .csv file** with the email addresses of the people you want to include in the reference group.
    - **Use filters** to filter by the HR (organizational) attributes in the uploaded .csv file (with the group's email addresses) or by applying filters to the organizational data attributes within Workplace Analytics.
4. Choose the **Other group** as the comparison group and enter a name for that group.
5. Identify the group members, as follows:
    - **Upload a .csv file** with the email addresses of the people you want to include in the other (comparison) group.
    - **Use filters** to filter by the HR (organizational) attributes in the uploaded .csv file (with the group's email addresses) or by applying filters to the organizational data attributes within Workplace Analytics.

6. Apply **Conditions** (optional) with filters that specify the attributes that should be similar for comparing the groups. For example, to compare Reference group's managers to the Other group's managers, add a conditional filter to include only managers in the output.

7. Select **Submit**. When the analysis is ready, select the **View** (eye) icon to see the results on the **Peer analysis** page.

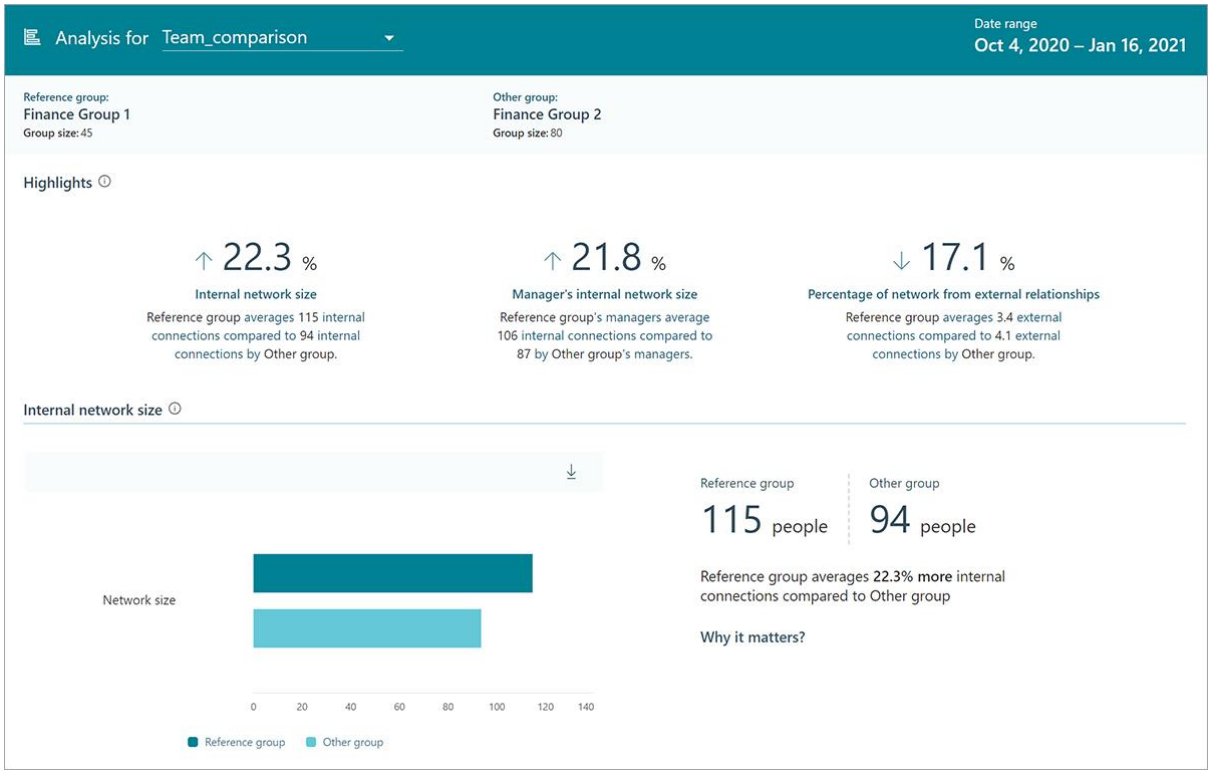


Peer analysis results include the date range, a **Highlights** section with differences in the three most variant metrics between the groups, and charts that compare raw averages for multiple metrics.

Peer analysis example scenario

You would like to understand the difference in collaboration patterns between the corporate finance office and regional finance offices at Contoso. In **Peer analysis**, create a new analysis with **Corporate finance** as the **Reference group**, and **Regional finance groups** as the **Other group**, and then select **Submit**.

The results show that Corporate finance employees have 22 percent larger internal networks, but their external network connections are 17 percent smaller.



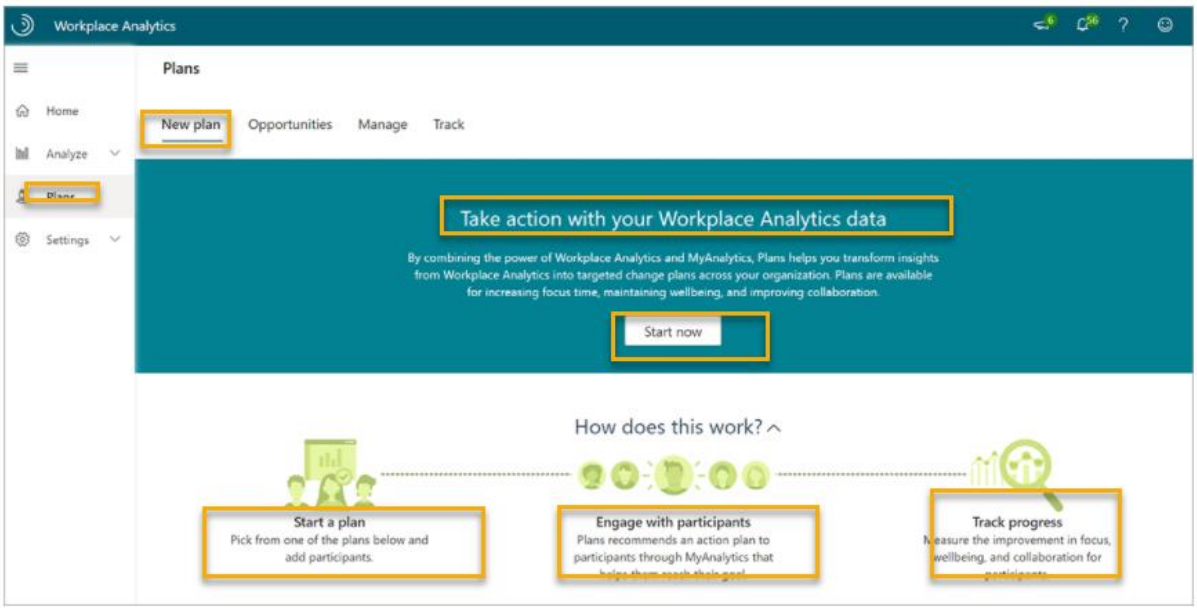
Plans

- You can gain a lot of information about how employees in your organization get work done from the other Analyze features.

- With **Plans**, you can transform these insights into **actions.**

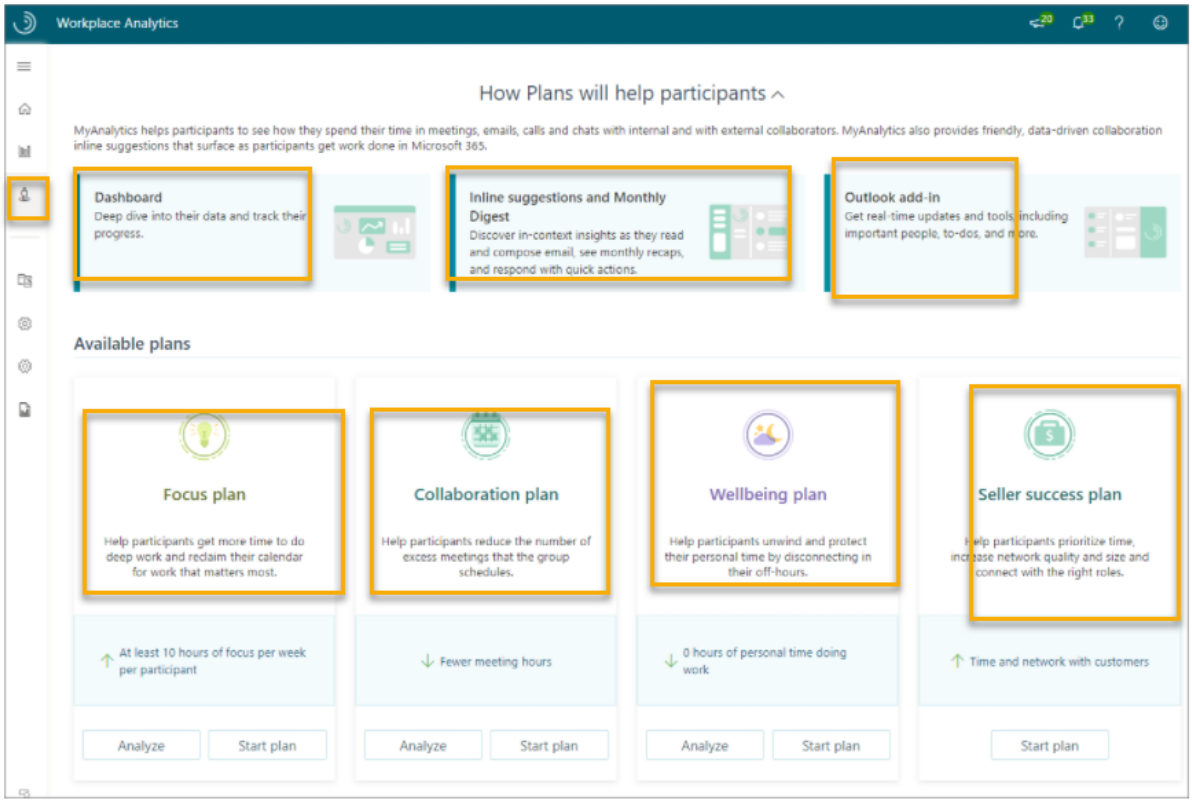
- Enrolment in a **Plan** requires that an employee has access to **Personal** insights in Viva Insights.

- A **Plan** combines the **team goal setting** and tracking with **useful suggestions** through their personal insights with Viva Insights to help them shift their ways of working.



The following plans are currently available:

- **Focus plan** - Helps participants get more time to do **deep-dive work** and reclaim their **calendar for work that matters most**.
- **Collaboration plan** - Helps **participants reduce the number of excessive meetings** that the group schedules.
- **Wellbeing plan** - Helps **participants unwind** and protect **their personal** time by disconnecting outside of work.
- **Seller success plan** - Helps participants **prioritize time**, increase network **quality and size**, and connect with the right roles.

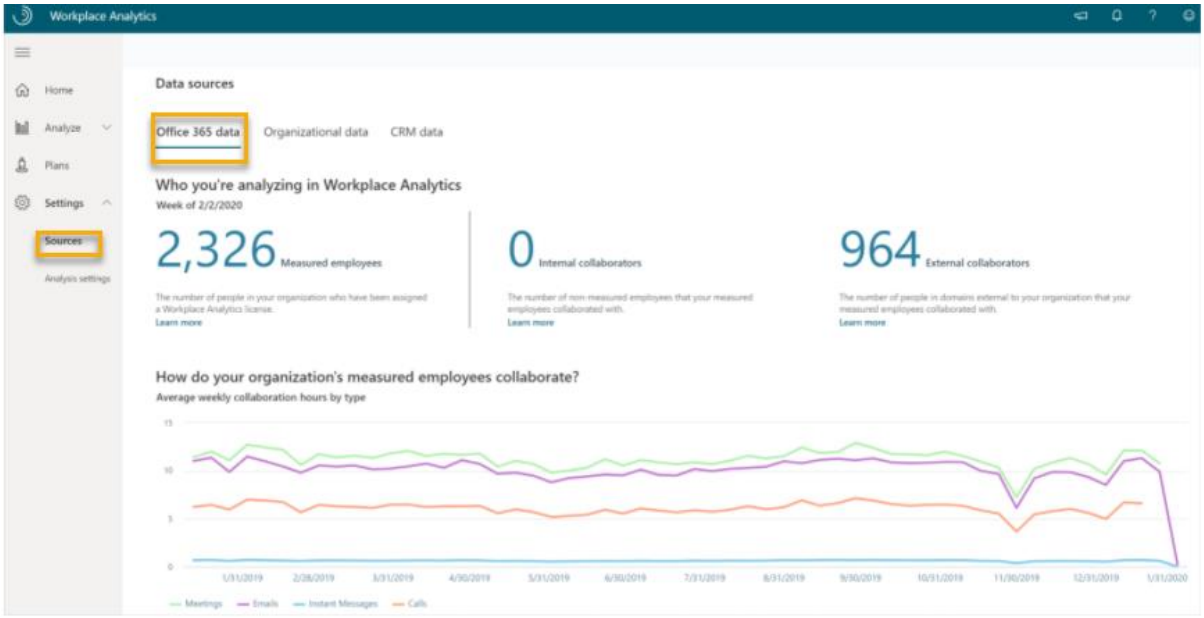


For each plan type, you can select **Analyze** and get answers to questions involving relevant metrics. Then select **Start plan** to create, manage, and track a specifically targeted plan for employees in your organization.

Plans help give managers and employees visibility into how they are spending time to increase their focus and improve collaboration and wellbeing.

Data sources

- Workplace Analytics enables analysts and admins to check the quality of the data sources.
- In **Data sources**, view the **Microsoft 365 collaboration** data for your measured population over time. Use this view to identify any dates or date ranges you should include or exclude from your analysis, such as scheduled holidays.



You can also assess the quality and completeness (coverage) of the uploaded organizational data (HR attributes) for your measured population as the following shows.



Additionally, if your admin has uploaded CRM data, you can also confirm the quality of join coverage (the percentage of CRM contact and sales assignment data associated with CRM accounts).

Example scenario for Data sources

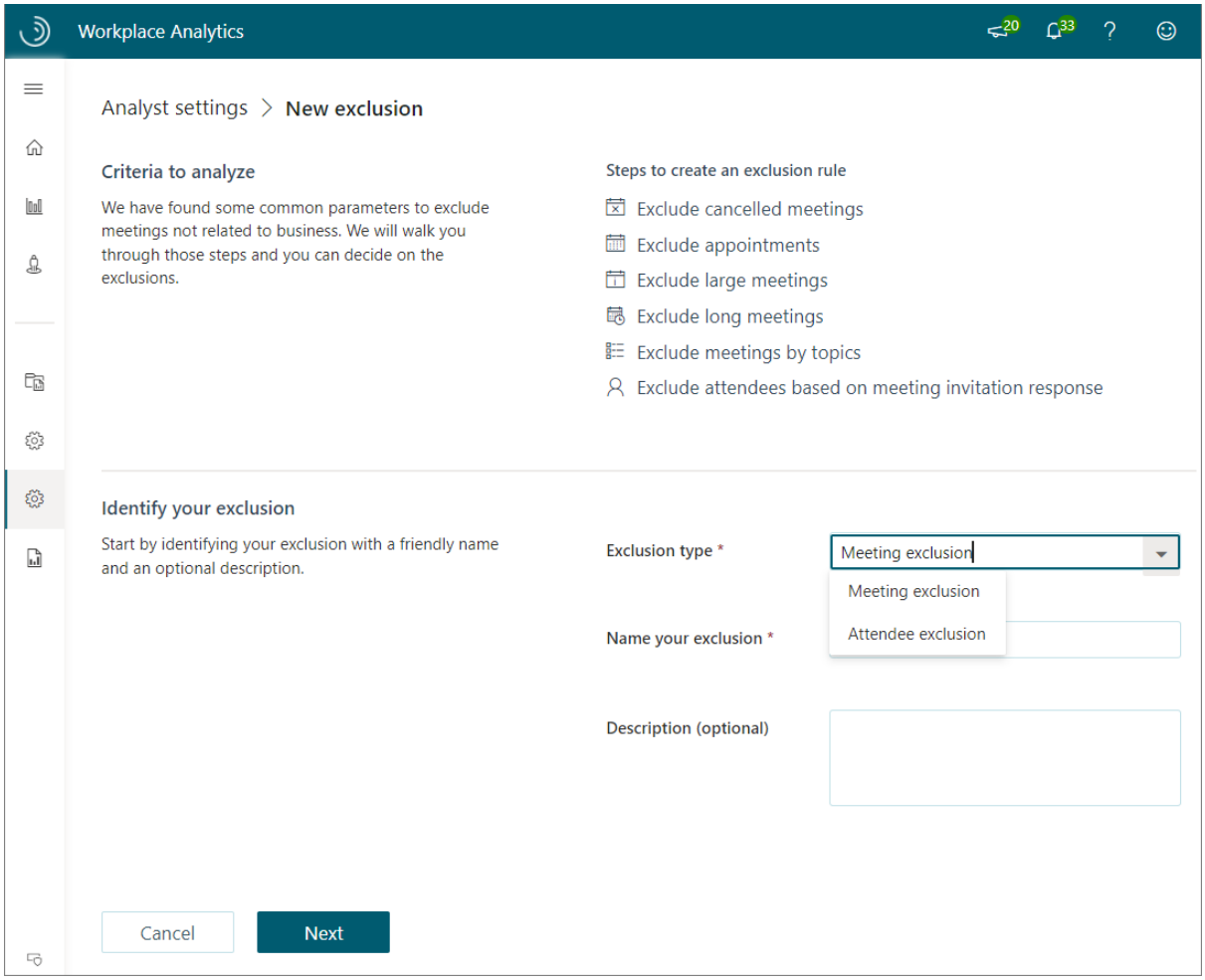
You want a high-level look at some **fourth-quarter custom metrics** by using a query and you probably need to exclude specific dates as outliers.

Go to **Data sources** and look at the collaboration data over time for the measured population. For this example, you see **two dips in the data**, both **national holidays**. So when you run the query, you can filter out the holiday dates from the query results for more accurate analysis.

Exclusions

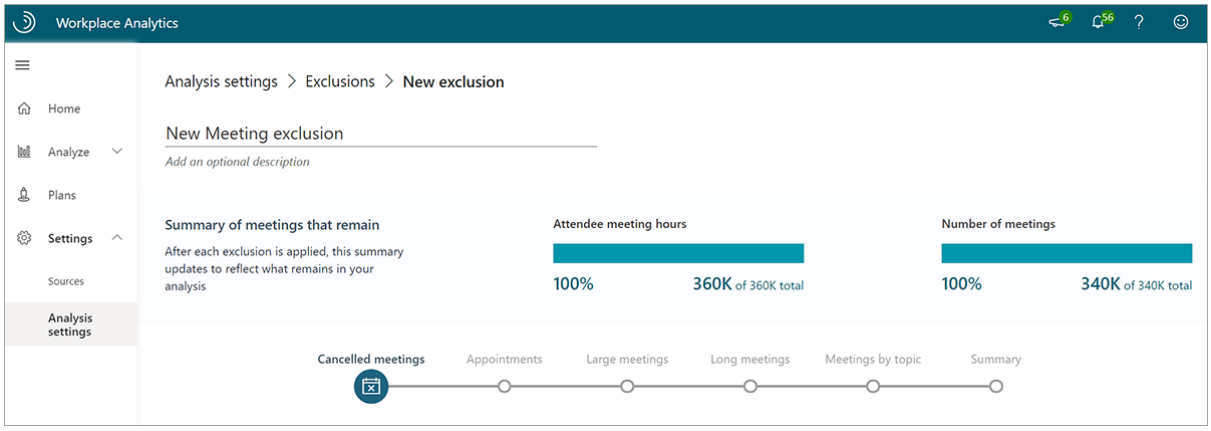
Not **all scheduled meetings are business-related**. People often have personal appointments or holidays scheduled in their work calendars. For analysis in Workplace Analytics, you might also want to exclude excessively long or large meetings, or attendees who haven't responded or have responded as "tentative."

Workplace Analytics has a **built-in solution** to address these issues called **Exclusions**. Analysts can use meeting or attendee exclusions to create specific rules for which meetings or attendees to exclude while adding each rule to a dropdown list of rules for specific analyses.



With meeting exclusions, you can:

- Exclude **cancelled meetings**.
- Exclude **appointments** (time schedule with only **one attendee**).
- Set thresholds for **attendance size** and **duration of meetings** to include.
- Exclude **meeting subjects by topic**.



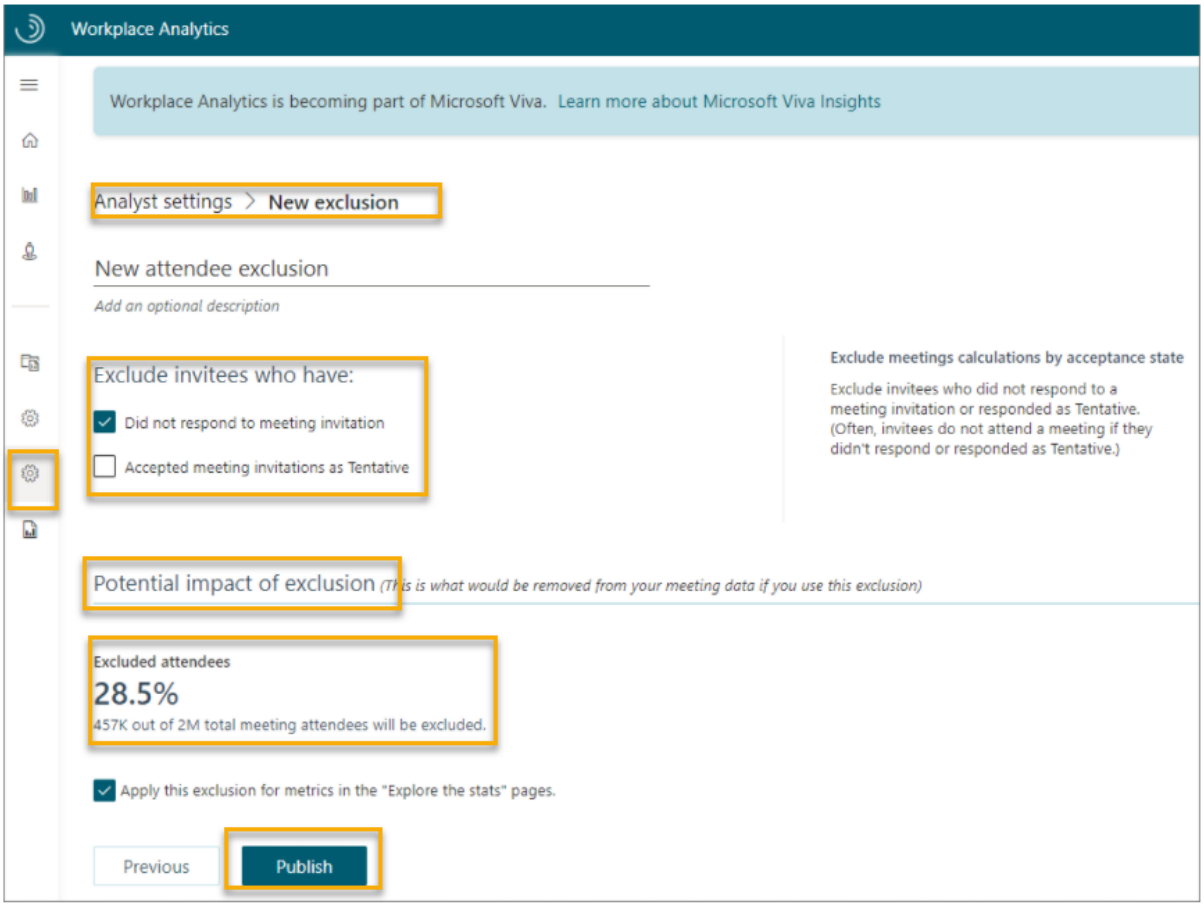
Workplace Analytics has a default **meeting exclusion** rule that excludes meetings with

- only one attendee,

- meetings longer than eight hours,
- meetings with **250 or more participants**, and
- cancelled meetings. This rule is used if no other meeting exclusion is selected.

With **attendee exclusions**, you can:

- **Exclude invitees** who **did not respond** to meeting invitations.
- Exclude invitees **who accepted meeting** invitations as **tentative**.



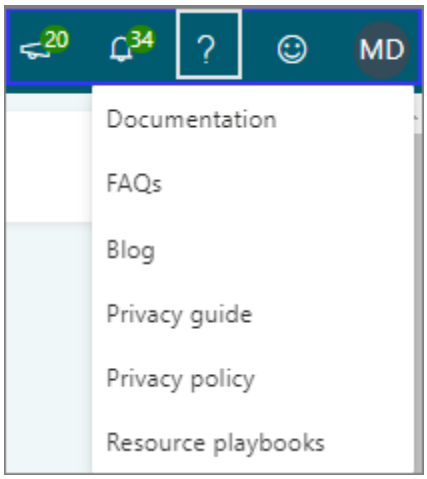
You can use meeting and attendee exclusions to exclude meetings or attendees you don't want to include in your analysis (or include meetings excluded in the default meeting exclusion rule).

Example scenario for exclusions

- You want to analyze when people are **working remotely from home**.
- People at Contoso let their managers know they are **working from home** with a one-person meeting that's titled **Remote day**.
- Because the *default meeting exclusion rule excludes these meetings*, you need to create a new rule.
- To do so, go to **Analyst settings** > **Meeting exclusions** and select **Add exclusion** to create a new meeting exclusion rule that includes meetings with only one person and with that meeting title.

Additional resources

You'll find the following additional resources in the upper right of the Workplace Analytics app.



- Select the **New features** (megaphone) icon to get information on new feature updates and releases.
- Select the **Notifications** (bell) icon for notifications and alerts about recent activity in Workplace Analytics. These show dates for recent data refreshes, organizational data uploads, newly created exclusions, and query auto-refreshes. They also alert you when a query finishes running.
- Select the **Help** (?) icon for the following:
    - **Documentation** - Links to product documentation with more extensive information about Workplace Analytics and Viva Insights.
    - **FAQs** - Find frequently asked questions with the answers you are looking for.
    - **Blog** - Learn about past feature updates and product releases. See the new Viva Insights Community that's replacing the blog for the latest news about feature updates, new releases, industry articles, learning paths, and community forums.
    - **Privacy guide** - Links to in-depth information about data protection, how you can control your data, and who has access to that data.
    - **Privacy policy** - Shows the general privacy policy.
    - **Resource playbooks** - Links to a list of available playbooks for more in-depth information about how to use the features in Viva Insights and Workplace Analytics.
- **Feedback** - Use to send Microsoft your comments and questions.
- **User icon** - Shows your account information, including what roles you're assigned, and the **Sign out** option.

Understand setup and privacy

Completed100 XP

- 7 minutes

Set up Workplace Analytics

Setting up **Workplace Analytics** is a straightforward process. Here's an overview of the primary steps:

1. Your **Microsoft 365** or **Azure Active Directory** admin assigns the licenses and roles.
2. The designated **Workplace Analytics** admin sets up the **system defaults** and **privacy settings**.
3. The **Workplace Analytics admin** then prepares and **uploads** the organizational data.
4. **Workplace Analytics validates** the upload and then **processes the data.**

After these steps are complete, your organization has **full access to all service features** (except for **admin-only settings**, such as for uploading **HR data and** the **privacy and system default settings**).

- Organizational data contains **effective dates that map to the Microsoft 365 data**.
- This data should be uploaded on a **regular (monthly) schedule** to reflect changes in your organization.
- The Microsoft 365 **collaboration data** updates **weekly**.

For more information on system requirements and data processing, see Learn more.

Workplace Analytics and data privacy

- As a Microsoft 365 service, Workplace Analytics resides within the **Microsoft 365 trust boundaries** as defined by organization for **privacy safeguards** and **protections** of individual employees.
- By default, **only metadata is processed** for generating metrics that do not include personal information.
- Your organization has **full control over how Workplace Analytics is used, deployed,** and the **visibility** it has in your organization.

The following **are user-specific controls**.

- **Scope of population (**with the option to exclude sensitive groups).
- **Analyst (role-based) access** to Workplace Analytics analysis and to **specific population scopes.**
- Visibility to meeting **subject lines**.
- **Exclusion**s set for **all meetings and emails based on keywords** (in subject lines) that you deem sensitive.
- **Specific individuals** or **domains.**
- **Organizational attributes** loaded.

- With Workplace Analytics, the objective is not **to examine individual activity**, but to recognize **group-level trends** occurring in your organization.
- It uses **header level metadata** and not content, such as body of **emails** or **email attachments**

- Features in Workplace Analytics default to **non-personal information** and a **minimum aggregate threshold of five**

Summary and knowledge check

200 XP

- 5 minutes
- 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.

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.

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

3.

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

Email attachments

Header-level data

Body of emails

Check your answers

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?

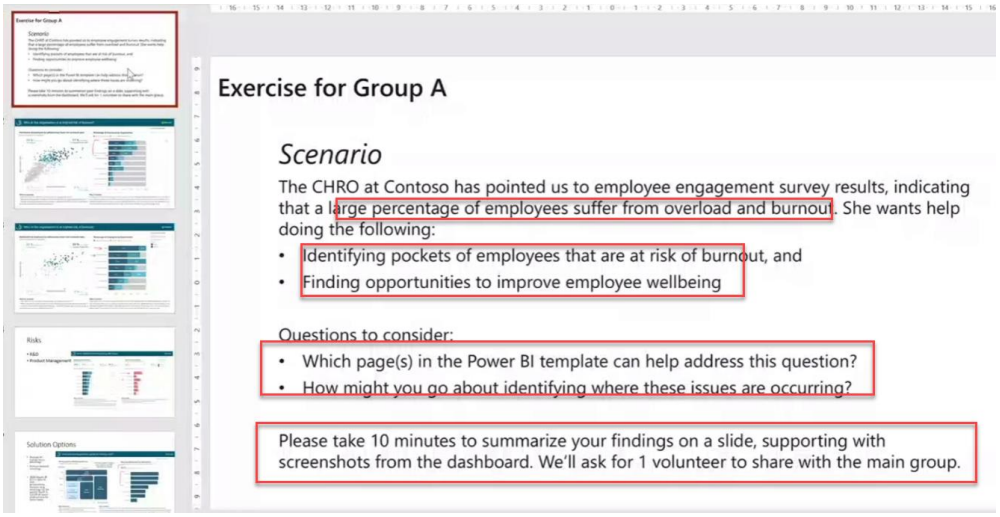
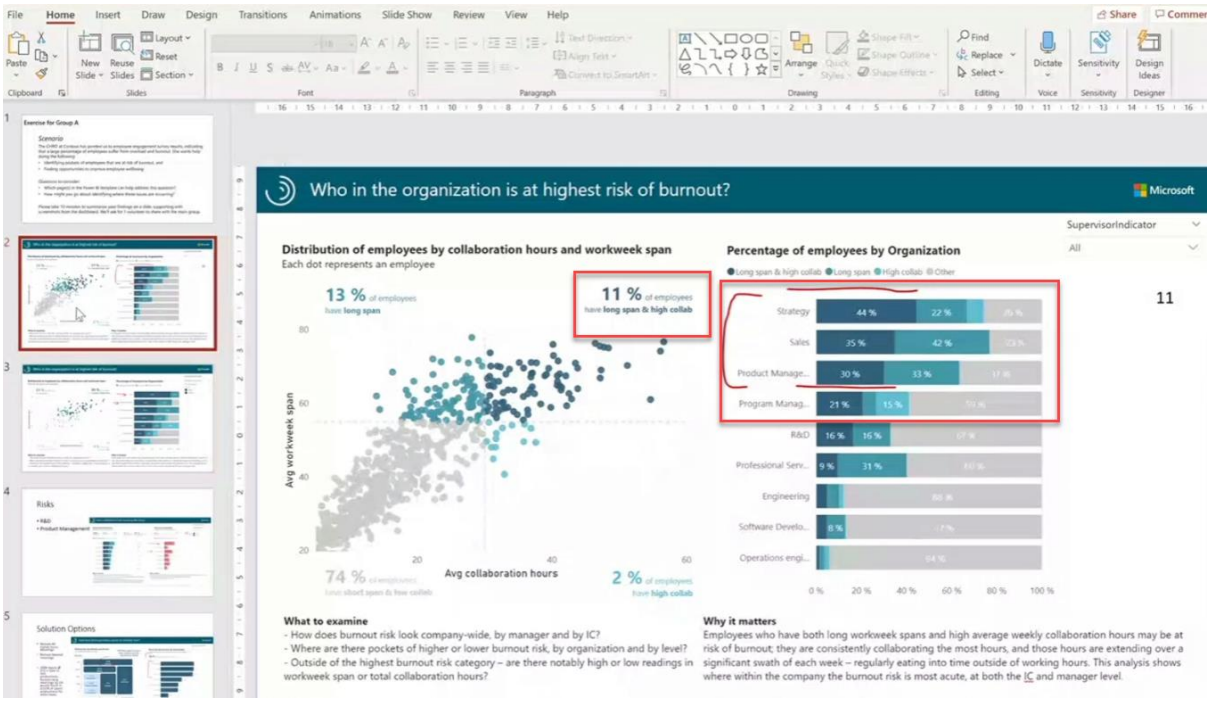
- ( ) Email attachments
- (●) Header-level data ✓

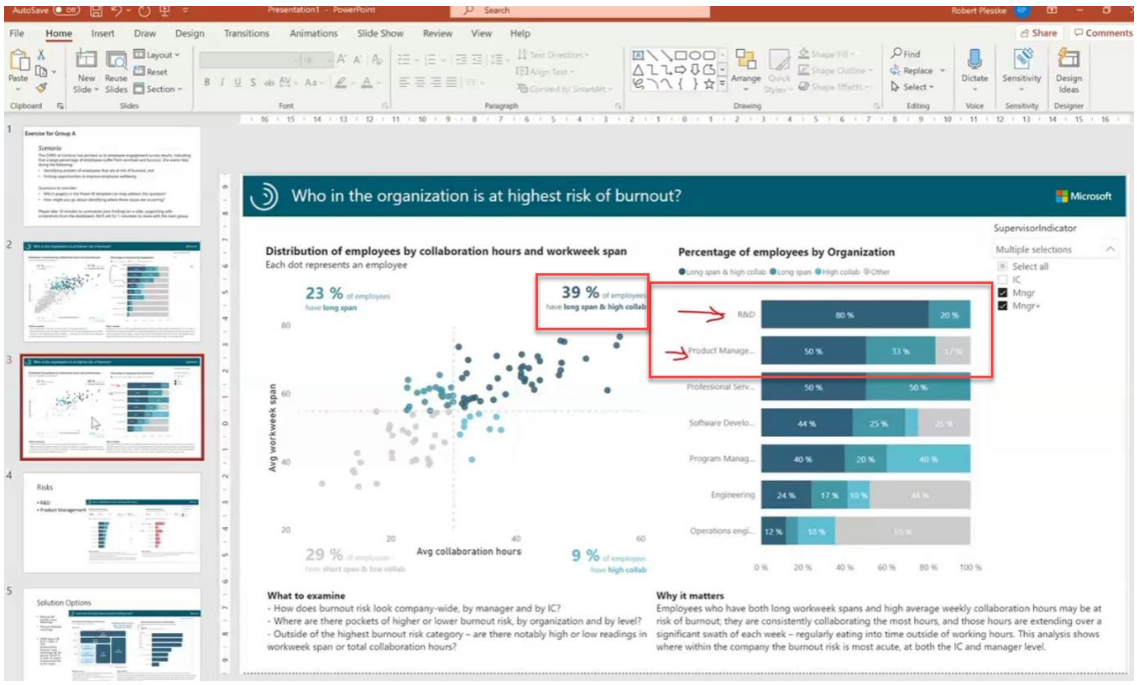
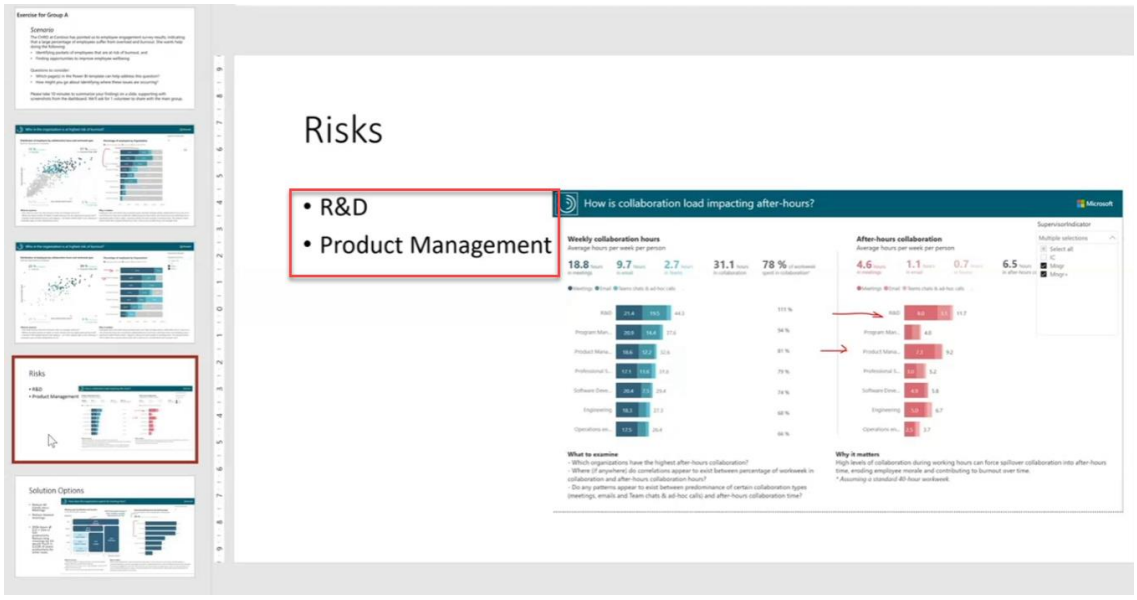
  Correct. Workplace Analytics does not look at email body text.

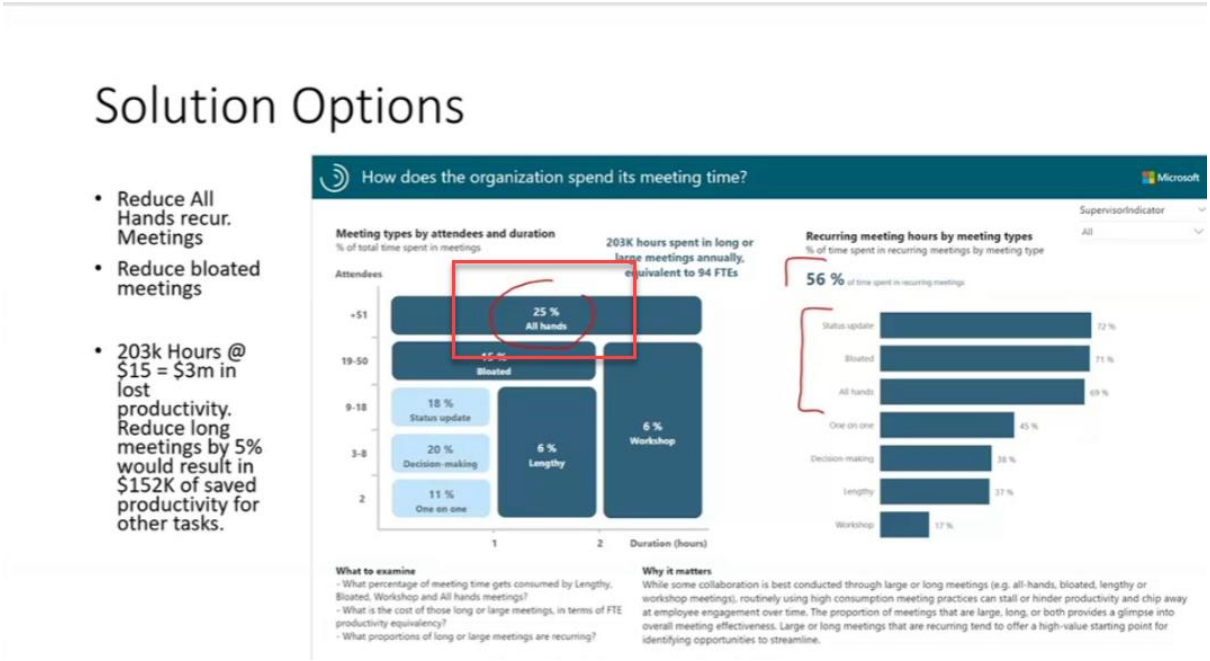
- ( ) Body of emails

Module complete:

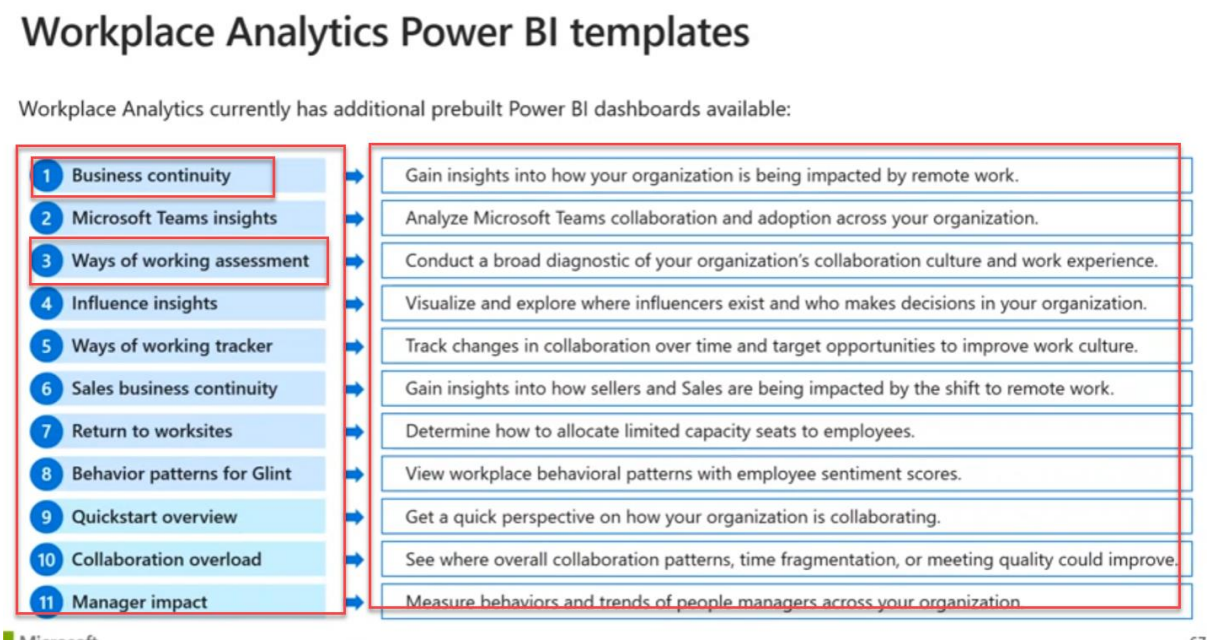
Watch the Sample Exercise Output video

- 
Exercise for Group A
Scenario
The CHRO at Contoso has pointed us to employee engagement survey results, indicating that a large percentage of employees suffer from overload and burnout. She wants help doing the following:
• Identifying pockets of employees that are at risk of burnout, and
• Finding opportunities to improve employee wellbeing
Questions to consider:
• Which page(s) in the Power BI template can help address this question?
• How might you go about identifying where these issues are occurring?
Please take 10 minutes to summarize your findings on a slide, supporting with screenshots from the dashboard. We'll ask for 1 volunteer to share with the main group.
- 
Who in the organization is at highest risk of burnout?
Microsoft
Distribution of employees by collaboration hours and workweek span
Each dot represents an employee
13 % of employees have long span
11 % of employees have long span & high collab
74 % of employees have short span & low collab
2 % of employees have high collab
Avg workweek span
Avg collaboration hours
Percentage of employees by Organization
Long span & high collab Long span High collab Other
Strategy 44 % 22 % 25 %
Sales 35 % 42 % 23 %
Product Manage... 30 % 33 % 37 %
Program Manag... 21 % 15 % 64 %
R&D 16 % 16 % 67 %
Professional Serv... 9 % 31 % 60 %
Engineering 60 %
Software Develo... 8 % 92 %
Operations engi... 94 %
0 % 20 % 40 % 60 % 80 % 100 %
SupervisorIndicator
All
What to examine
- How does burnout risk look company-wide, by manager and by IC?
- Where are there pockets of higher or lower burnout risk, by organization and by level?
- Outside of the highest burnout risk category – are there notably high or low readings in workweek span or total collaboration hours?
Why it matters
Employees who have both long workweek spans and high average weekly collaboration hours may be at risk of burnout; they are consistently collaborating the most hours, and those hours are extending over a significant swath of each week – regularly eating into time outside of working hours. This analysis shows where within the company the burnout risk is most acute, at both the IC and manager level.
11

- 
Who in the organization is at highest risk of burnout?
Microsoft
Distribution of employees by collaboration hours and workweek span
Each dot represents an employee
23 % of employees have long span
39 % of employees have long span & high collab
29 % of employees have short span & low collab
9 % of employees have high collab
Avg workweek span
Avg collaboration hours
Percentage of employees by Organization
Long span & high collab
Long span
High collab
Other
R&D
Product Manage...
Professional Serv...
Software Develo...
Program Manag...
Engineering
Operations engi...
SupervisorIndicator
Multiple selections
Select all
IC
Mngr
Mngr+
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- 
Risks
• R&D
• Product Management
How is collaboration load impacting after-hours?
Microsoft
Weekly collaboration hours
Average hours per week per person
After-hours collaboration
Average hours per week per person
What to examine
Why it matters

- 

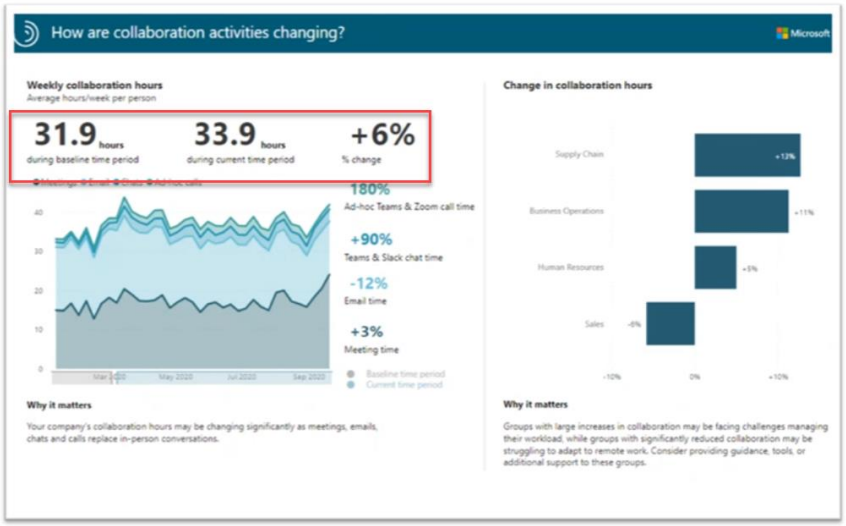
Watch the video about additional PBI templates including the Business Continuity Dashboard

- 

Business Continuity Dashboard

Gain insights into how your organization is being impacted by remote work.

- **How are collaboration activities changing?**
- **What are the impacts of work-life integration?**
- **Are external relationships being maintained?**
- **Are employees engaged and connected?**
- **How are work patterns evolving?**
- **How can remote work effectiveness be improved?**



-

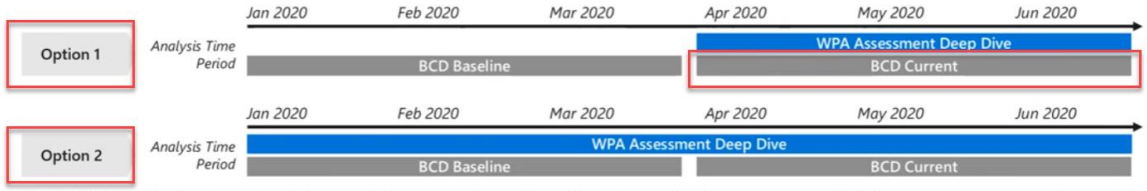
Comparison between Ways of working Assessment and BCD

Internal Microsoft Only

Business continuity dashboard (BCD)

- Comparison of pre and post shift to remote work collaboration patterns and answers high-level questions for the business:
  - How are collaboration activities changing?
  - What are the impacts of work-life integration?
  - Are external relationships being maintained?
  - Are employees engaged and connected?
  - How are work patterns evolving?
  - How can effectiveness be improved?
- The customer can customize the dates for pre and post shift to remote work that better reflect their reality.
- Provides comparisons and trendlines for selected collaboration metrics

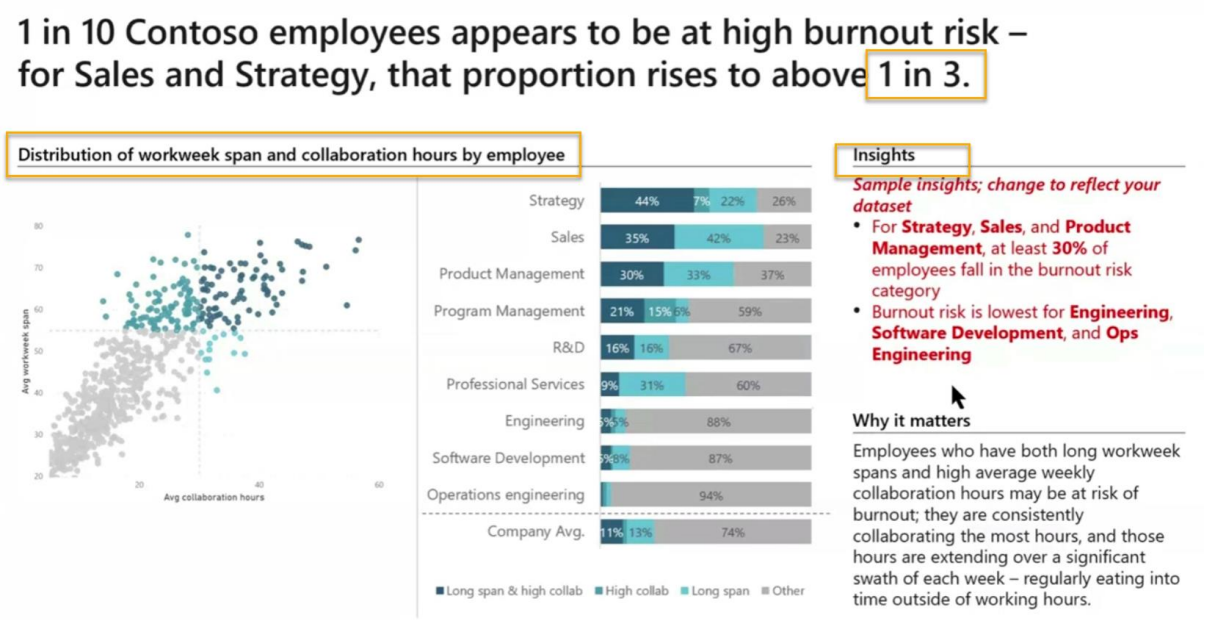
Two examples of how a customer might want to approach time periods in Ways of working Assessment and Business continuity dashboard



The Business continuity dashboard provides a comparison between both periods, but it does it from a high-level perspective. If the customer wants a detailed comparison of the specific business outcomes in the Collaboration Assessment, they can focus the Collaboration Assessment on either pre or post shift to remote work and after or during the engagement, their analyst can run the Collaboration Assessment template and do the comparisons.

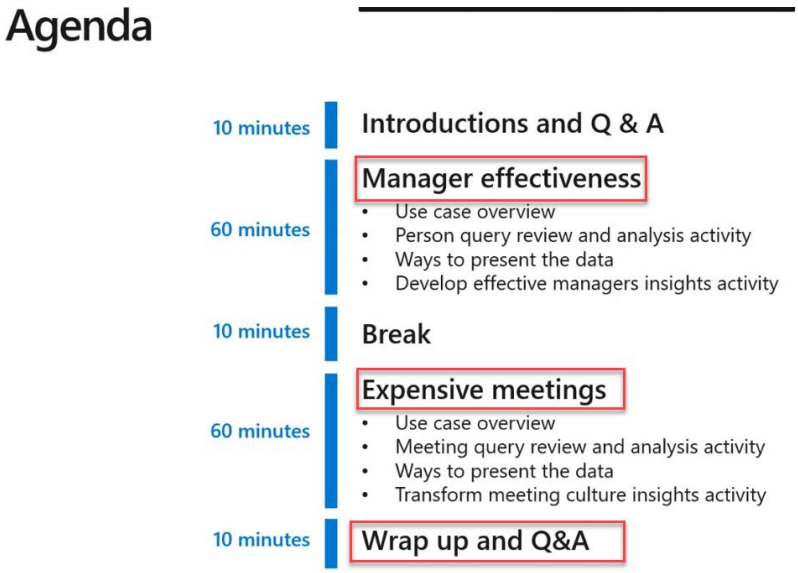
-

Burnout risk



Module 3: Viva Insights Analysis (2 videos, 2 exercises)

Watch the Workplace Analytics Analysis training video



-

Why learn about WpA queries and custom analysis?

- A pre-built Power BI template may not answer every customer question
- Learning how to build custom queries will enable you to develop you own unique capabilities
- Building this skillset will help you explore custom hypothesis and expand the scenarios in which you can apply Workplace Analytics data

Manager Effectiveness

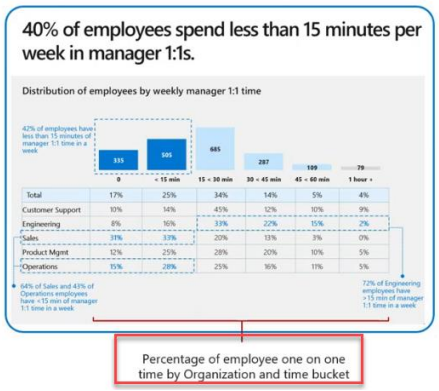
Use case overview: Manager effectiveness

Management and Coaching metrics measure collaboration between leaders, managers, and employees. Time with leaders and managers is often a key factor of employee engagement. Using the metrics, we can identify areas of manager effectiveness and begin to identify opportunities for delegation and coaching.

Time in Meetings with Manager:



One on one time with Manager:



- Why it's important?

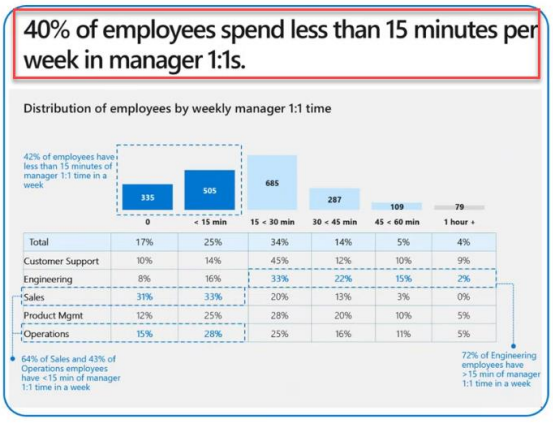
Management and Coaching

Why it's important:

Depending on roles and tenure, it can be important for employees to have time with their manager on a regular basis to encourage open communication, feedback cycles, and opportunities for growth.

Data can reveal inconsistencies in how managers collaborate with their teams and whether leaders and managers are available to their employees.

One on one time with Manager:



- Person queries

Person Queries

Use a person query to analyze data from the person point of view. You can aggregate metrics by attribute – like team, level, or location – to compare and contrast behaviors of different groups in the organization.



Use the person query to learn:

- How specific groups spend their time
- How time use varies between groups
- How one aspect of collaboration influences other workplace behaviors

Person queries return one row per person, per period (day, week, or month).

Each row includes:
- Standard or customized metrics you specify
- Organizational attributes you select for summarization

Options for metrics can include criteria related to their work activities, such as:
- Day of week and time of meeting
- How many people were invited
- Attendee/organizer attributes
- When emails were sent
- How many people were included in emails
- Recipient/sender attributes
- Email and meeting subject line keywords

- Metric Definitions

Metric Definitions – Develop effective managers

Meeting hours with manager 1:1

Total number of meeting hours involving only the person and their manager.

Meeting hours with manager one on one is from the employee's perspective.

Meeting hours

Number of hours the person spent in meetings with at least on other person

Meeting hours with manager

Total number of meeting hours where attendees included at least the person and their manager.

- Activity

Activity – Query Exercise: Develop effective managers

10 min.

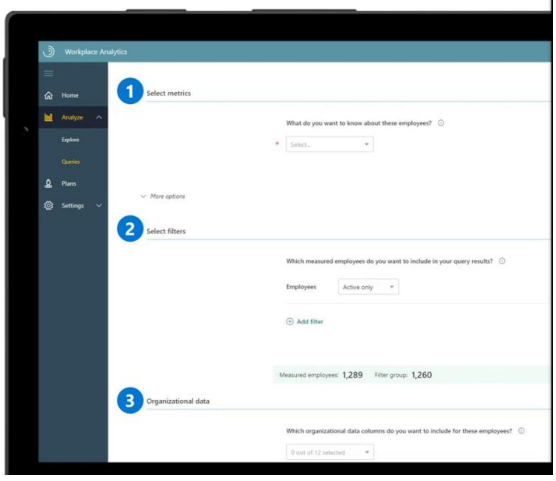
www.workplaceanalytics.office.com

Select Person Query

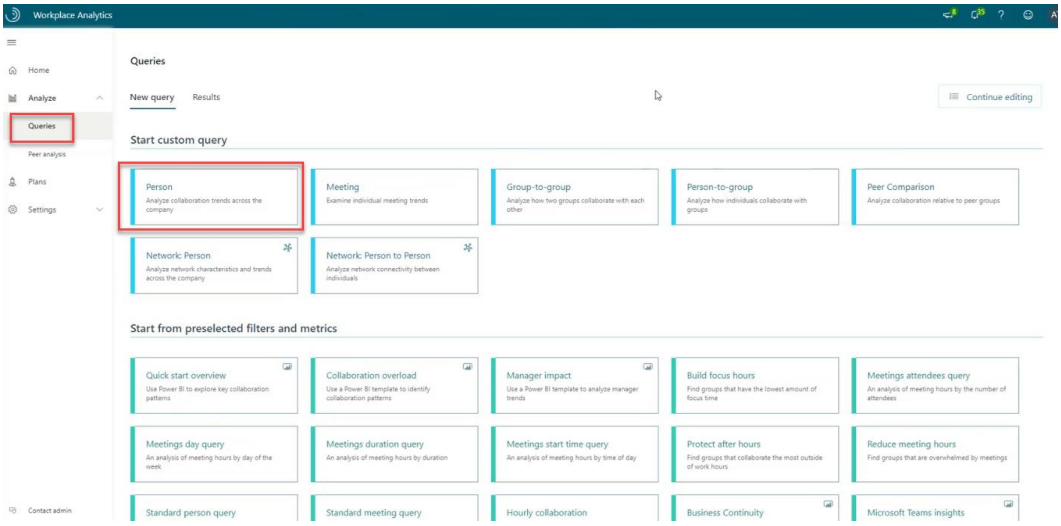
Choose metrics, filters, and organizational attributes

1. **Select metrics:**
   - Meeting hours with manager 1:1
   - Meeting hours with manager
   - Meeting hours
2. **Select filters:** None required, unless there is a specific group you want to analyze
3. **Organizational data:** Select all

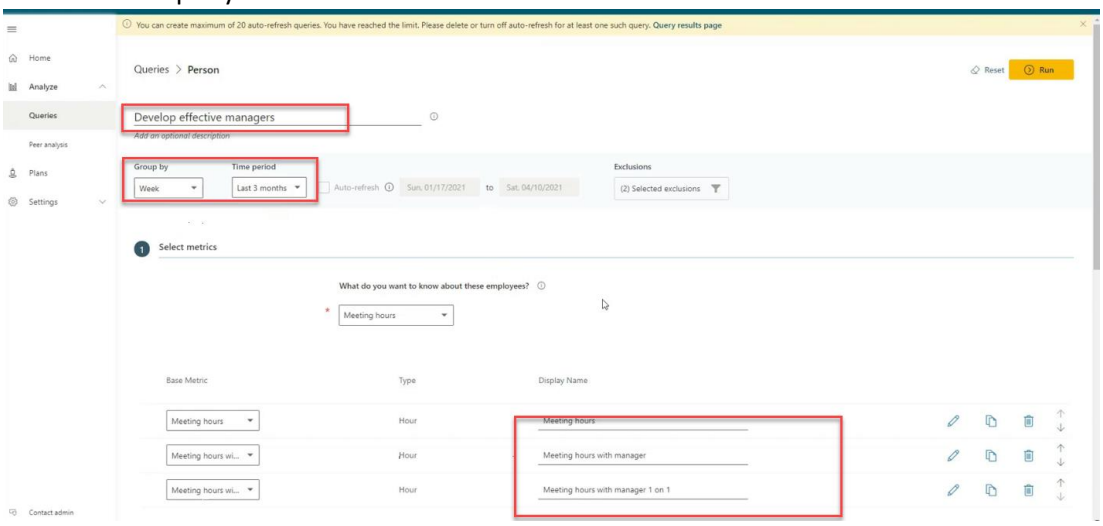
Download CSV from:
Effective manager query, from
In the Class folder

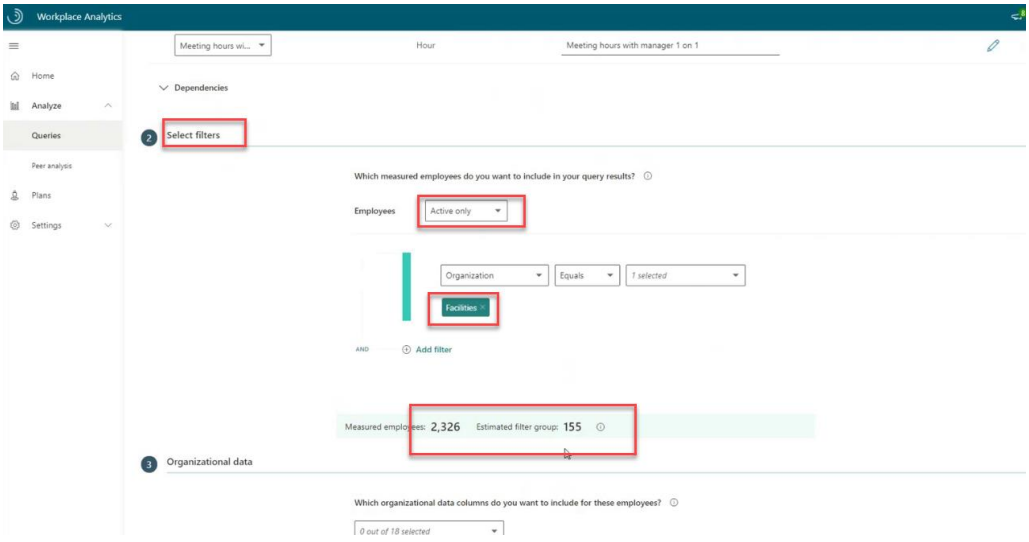


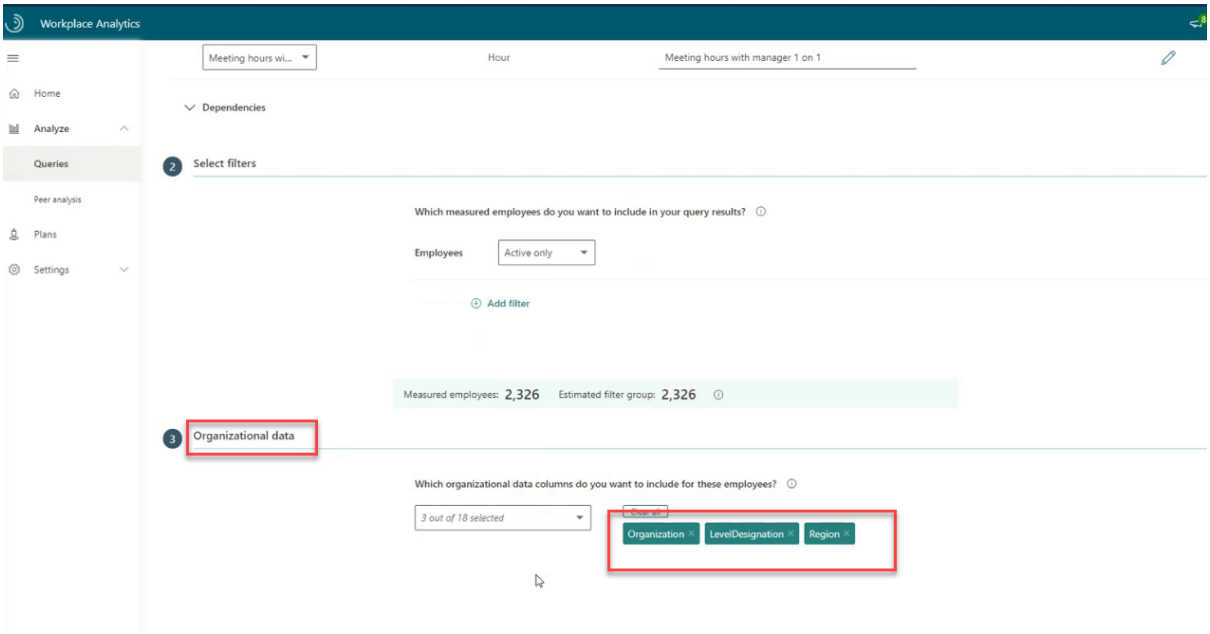
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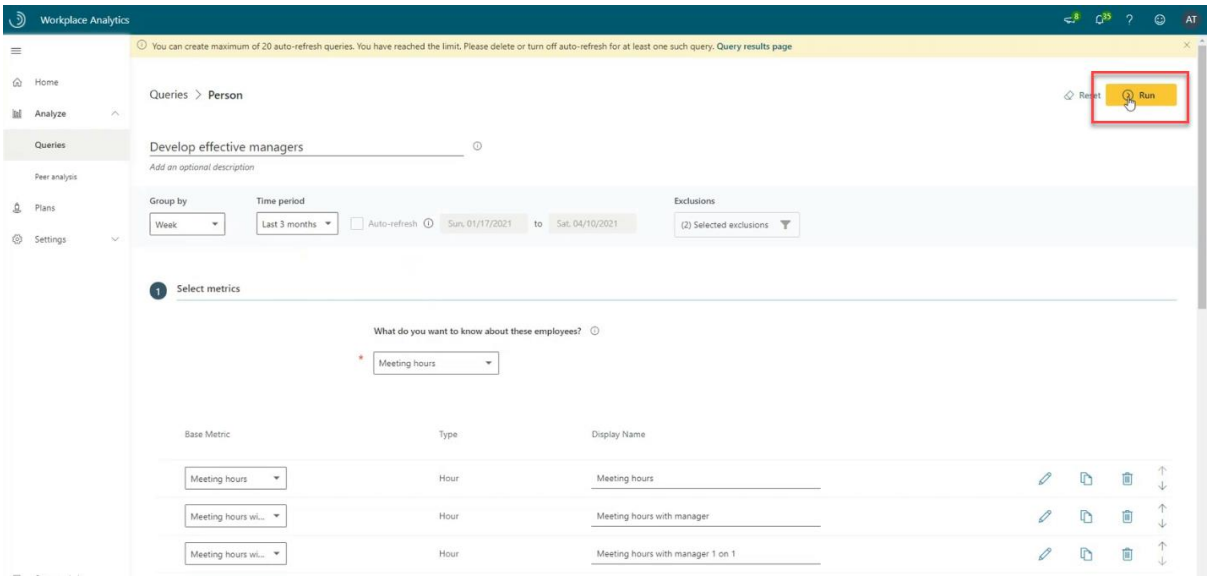


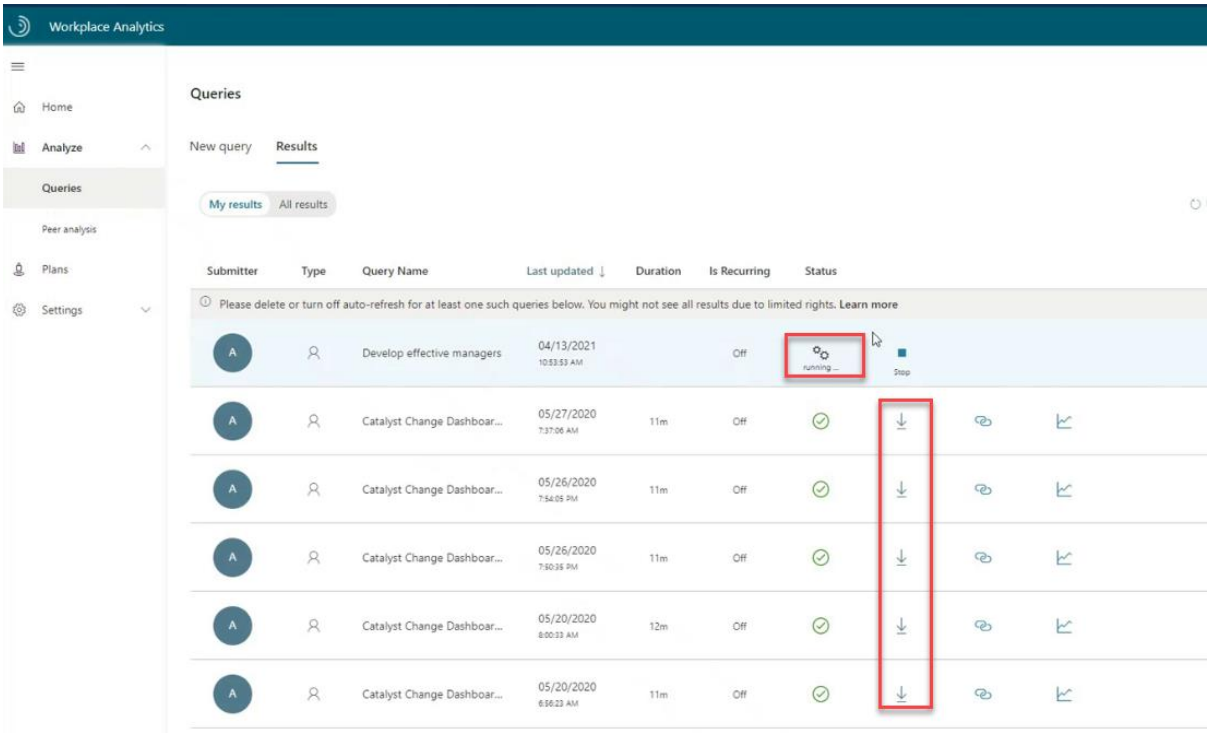
- Create a new query



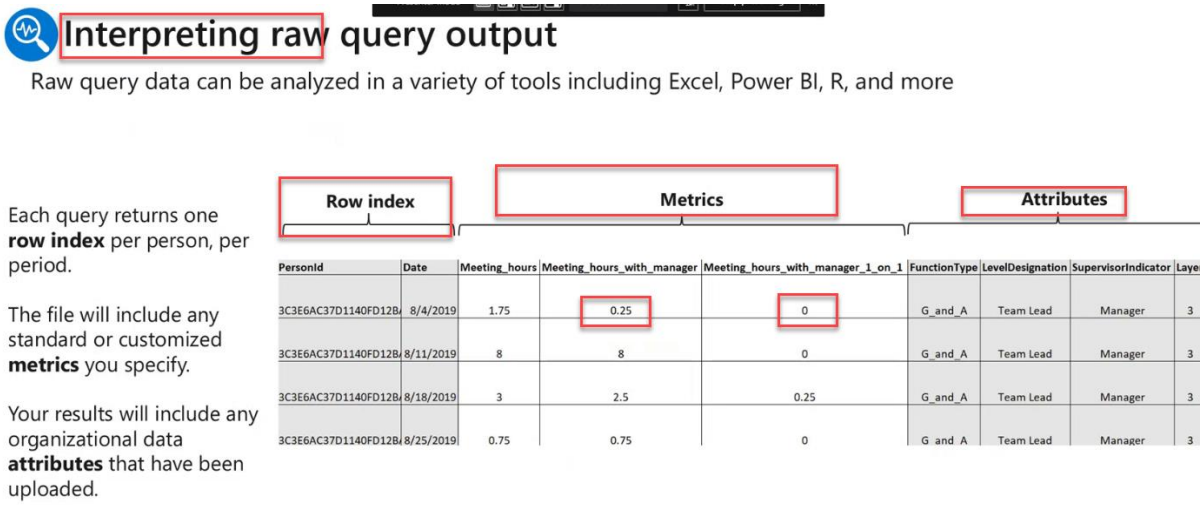



Workplace Analytics
Meeting hours wi...
Hour
Meeting hours with manager 1 on 1
Home
Analyze
Queries
Peer analysis
Plans
Settings
Dependencies
2
Select filters
Which measured employees do you want to include in your query results?
Employees
Active only
Add filter
Measured employees: 2,326
Estimated filter group: 2,326
3
Organizational data
Which organizational data columns do you want to include for these employees?
3 out of 18 selected
Organization
LevelDesignation
Region

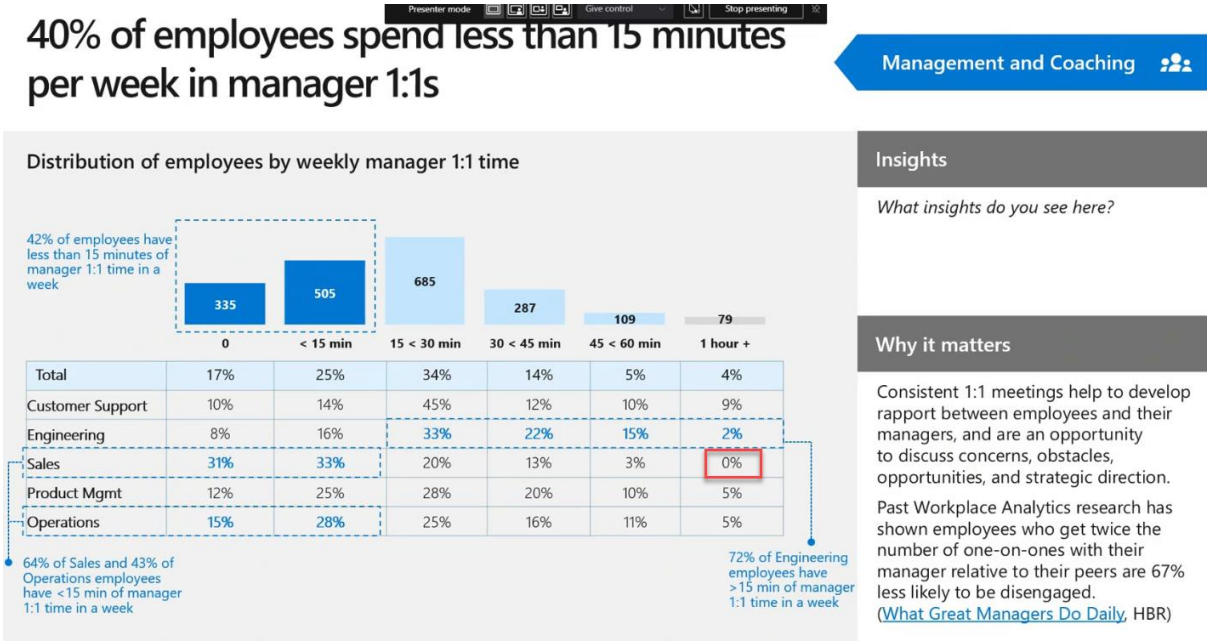

Workplace Analytics
You can create maximum of 20 auto-refresh queries. You have reached the limit. Please delete or turn off auto-refresh for at least one such query. Query results page
Home
Analyze
Queries
Peer analysis
Plans
Settings
Queries > Person
Reset
Run
Develop effective managers
Add an optional description
Group by
Week
Time period
Last 3 months
Auto-refresh
Sun, 01/17/2021
to
Sat, 04/10/2021
Exclusions
(2) Selected exclusions
1
Select metrics
What do you want to know about these employees?
Meeting hours
Base Metric
Type
Display Name
Meeting hours
Hour
Meeting hours
Meeting hours wi...
Hour
Meeting hours with manager
Meeting hours wi...
Hour
Meeting hours with manager 1 on 1

- 

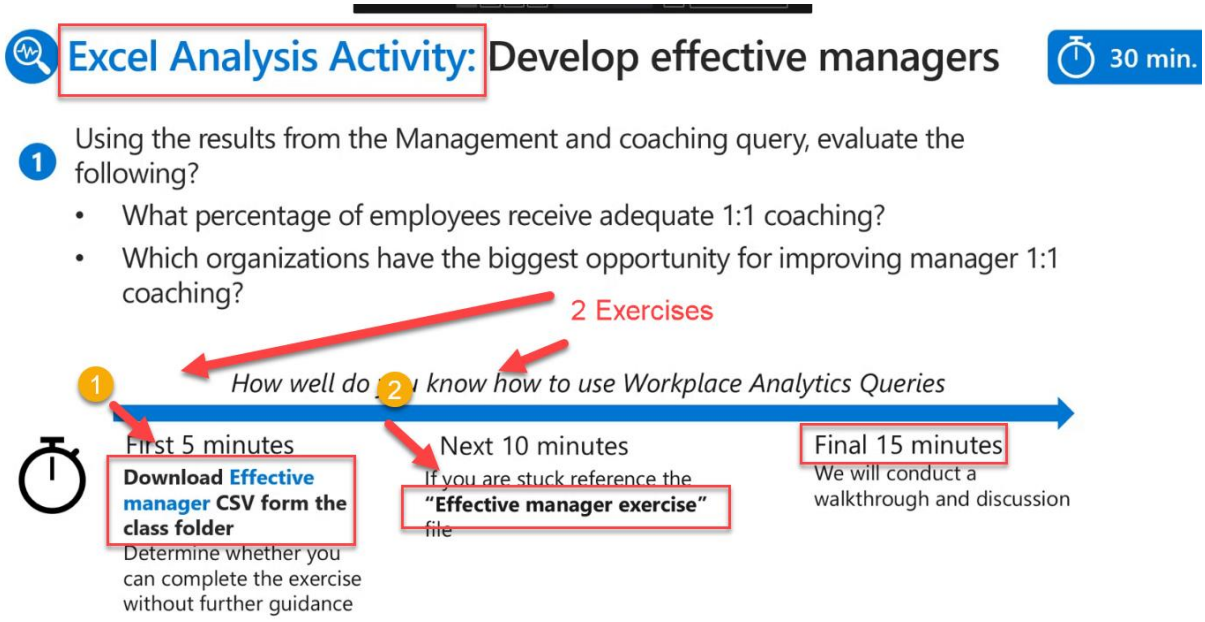
- It's in **class folder**.
- Interpreting raw query output.



- Management and Coaching

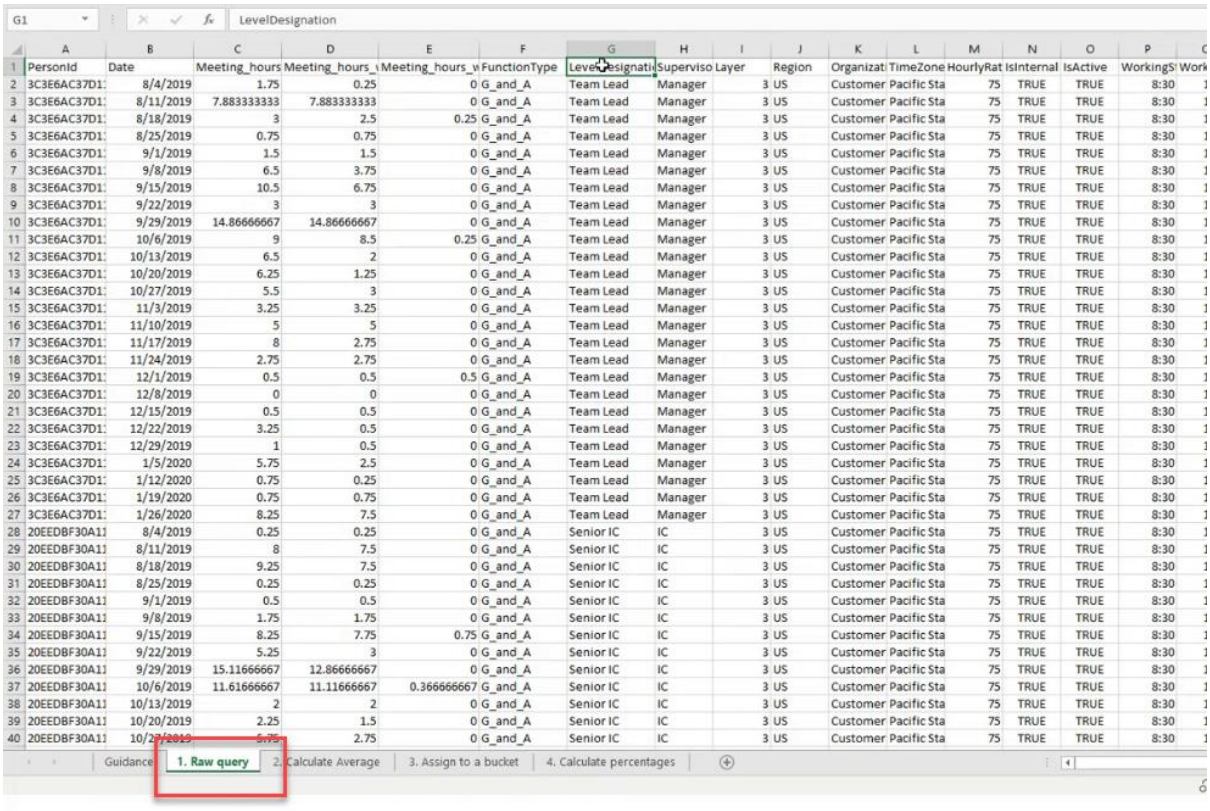


- Excel Develop effective managers



- Walkthrough and Discussion

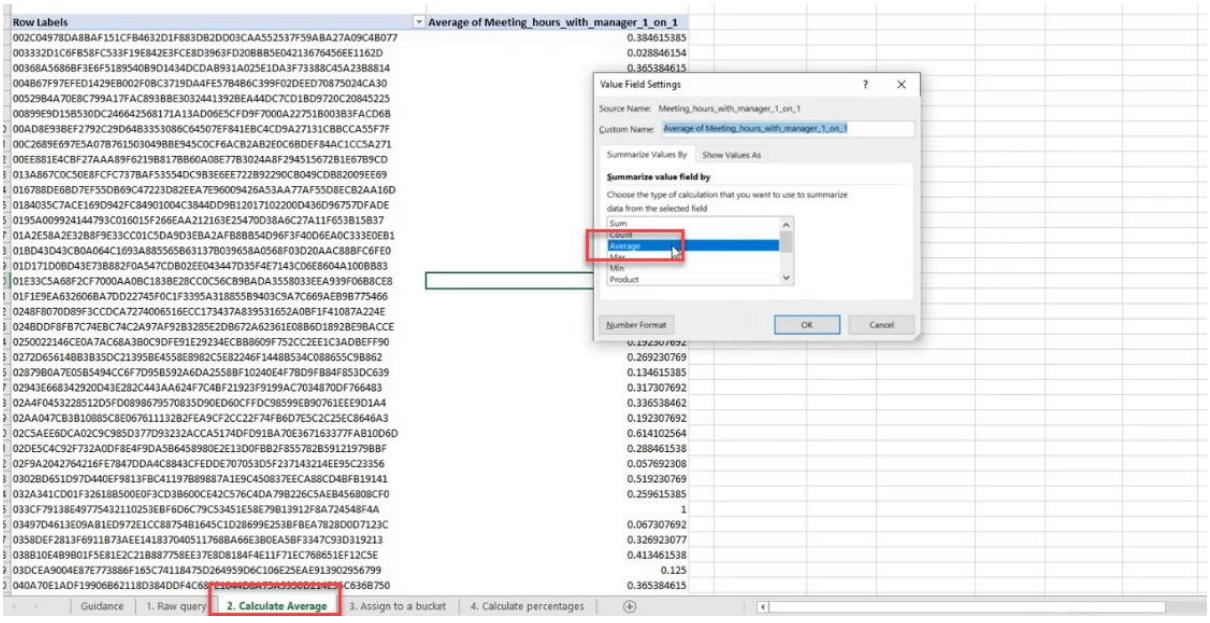
Raw Query



PersonId	Date	Meeting_hours	Meeting_hours_	Meeting_hours_w	FunctionType	LevelDesignati	Supervisor	Layer	Region	Organizati	TimeZone	HourlyRat	IsInternal	IsActive	WorkingSt	Work
3C3E6AC37D1	8/4/2019	1.75	0.25	0	G_and_A	Team Lead	Manager	3	US	Customer	Pacific Sta	75	TRUE	TRUE	8:30	1
3C3E6AC37D1	8/11/2019	7.883333333	7.883333333	0	G_and_A	Team Lead	Manager	3	US	Customer	Pacific Sta	75	TRUE	TRUE	8:30	1
3C3E6AC37D1	8/18/2019	3	2.5	0.25	G_and_A	Team Lead	Manager	3	US	Customer	Pacific Sta	75	TRUE	TRUE	8:30	1
3C3E6AC37D1	8/25/2019	0.75	0.75	0	G_and_A	Team Lead	Manager	3	US	Customer	Pacific Sta	75	TRUE	TRUE	8:30	1
3C3E6AC37D1	9/1/2019	1.5	1.5	0	G_and_A	Team Lead	Manager	3	US	Customer	Pacific Sta	75	TRUE	TRUE	8:30	1
3C3E6AC37D1	9/8/2019	6.5	3.75	0	G_and_A	Team Lead	Manager	3	US	Customer	Pacific Sta	75	TRUE	TRUE	8:30	1
3C3E6AC37D1	9/15/2019	10.5	6.75	0	G_and_A	Team Lead	Manager	3	US	Customer	Pacific Sta	75	TRUE	TRUE	8:30	1
3C3E6AC37D1	9/22/2019	3	3	0	G_and_A	Team Lead	Manager	3	US	Customer	Pacific Sta	75	TRUE	TRUE	8:30	1
3C3E6AC37D1	9/29/2019	14.86666667	14.86666667	0	G_and_A	Team Lead	Manager	3	US	Customer	Pacific Sta	75	TRUE	TRUE	8:30	1
3C3E6AC37D1	10/6/2019	9	8.5	0.25	G_and_A	Team Lead	Manager	3	US	Customer	Pacific Sta	75	TRUE	TRUE	8:30	1
3C3E6AC37D1	10/13/2019	6.5	2	0	G_and_A	Team Lead	Manager	3	US	Customer	Pacific Sta	75	TRUE	TRUE	8:30	1
3C3E6AC37D1	10/20/2019	6.25	1.25	0	G_and_A	Team Lead	Manager	3	US	Customer	Pacific Sta	75	TRUE	TRUE	8:30	1
3C3E6AC37D1	10/27/2019	5.5	3	0	G_and_A	Team Lead	Manager	3	US	Customer	Pacific Sta	75	TRUE	TRUE	8:30	1
3C3E6AC37D1	11/3/2019	3.25	3.25	0	G_and_A	Team Lead	Manager	3	US	Customer	Pacific Sta	75	TRUE	TRUE	8:30	1
3C3E6AC37D1	11/10/2019	5	5	0	G_and_A	Team Lead	Manager	3	US	Customer	Pacific Sta	75	TRUE	TRUE	8:30	1
3C3E6AC37D1	11/17/2019	8	2.75	0	G_and_A	Team Lead	Manager	3	US	Customer	Pacific Sta	75	TRUE	TRUE	8:30	1
3C3E6AC37D1	11/24/2019	2.75	2.75	0	G_and_A	Team Lead	Manager	3	US	Customer	Pacific Sta	75	TRUE	TRUE	8:30	1
3C3E6AC37D1	12/1/2019	0.5	0.5	0.5	G_and_A	Team Lead	Manager	3	US	Customer	Pacific Sta	75	TRUE	TRUE	8:30	1
3C3E6AC37D1	12/8/2019	0	0	0	G_and_A	Team Lead	Manager	3	US	Customer	Pacific Sta	75	TRUE	TRUE	8:30	1
3C3E6AC37D1	12/15/2019	0.5	0.5	0	G_and_A	Team Lead	Manager	3	US	Customer	Pacific Sta	75	TRUE	TRUE	8:30	1
3C3E6AC37D1	12/22/2019	3.25	0.5	0	G_and_A	Team Lead	Manager	3	US	Customer	Pacific Sta	75	TRUE	TRUE	8:30	1
3C3E6AC37D1	12/29/2019	1	0.5	0	G_and_A	Team Lead	Manager	3	US	Customer	Pacific Sta	75	TRUE	TRUE	8:30	1
3C3E6AC37D1	1/5/2020	5.75	2.5	0	G_and_A	Team Lead	Manager	3	US	Customer	Pacific Sta	75	TRUE	TRUE	8:30	1
3C3E6AC37D1	1/12/2020	0.75	0.25	0	G_and_A	Team Lead	Manager	3	US	Customer	Pacific Sta	75	TRUE	TRUE	8:30	1
3C3E6AC37D1	1/19/2020	0.75	0.75	0	G_and_A	Team Lead	Manager	3	US	Customer	Pacific Sta	75	TRUE	TRUE	8:30	1
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20EEDBF30A11	8/4/2019	0.25	0.25	0	G_and_A	Senior IC	IC	3	US	Customer	Pacific Sta	75	TRUE	TRUE	8:30	1
20EEDBF30A11	8/11/2019	8	7.5	0	G_and_A	Senior IC	IC	3	US	Customer	Pacific Sta	75	TRUE	TRUE	8:30	1
20EEDBF30A11	8/18/2019	9.25	7.5	0	G_and_A	Senior IC	IC	3	US	Customer	Pacific Sta	75	TRUE	TRUE	8:30	1
20EEDBF30A11	8/25/2019	0.25	0.25	0	G_and_A	Senior IC	IC	3	US	Customer	Pacific Sta	75	TRUE	TRUE	8:30	1
20EEDBF30A11	9/1/2019	0.5	0.5	0	G_and_A	Senior IC	IC	3	US	Customer	Pacific Sta	75	TRUE	TRUE	8:30	1
20EEDBF30A11	9/8/2019	1.75	1.75	0	G_and_A	Senior IC	IC	3	US	Customer	Pacific Sta	75	TRUE	TRUE	8:30	1
20EEDBF30A11	9/15/2019	8.25	7.75	0.75	G_and_A	Senior IC	IC	3	US	Customer	Pacific Sta	75	TRUE	TRUE	8:30	1
20EEDBF30A11	9/22/2019	5.25	3	0	G_and_A	Senior IC	IC	3	US	Customer	Pacific Sta	75	TRUE	TRUE	8:30	1
20EEDBF30A11	9/29/2019	15.11666667	12.86666667	0	G_and_A	Senior IC	IC	3	US	Customer	Pacific Sta	75	TRUE	TRUE	8:30	1
20EEDBF30A11	10/6/2019	11.61666667	11.11666667	0.366666667	G_and_A	Senior IC	IC	3	US	Customer	Pacific Sta	75	TRUE	TRUE	8:30	1
20EEDBF30A11	10/13/2019	2	2	0	G_and_A	Senior IC	IC	3	US	Customer	Pacific Sta	75	TRUE	TRUE	8:30	1
20EEDBF30A11	10/20/2019	2.25	1.5	0	G_and_A	Senior IC	IC	3	US	Customer	Pacific Sta	75	TRUE	TRUE	8:30	1
20EEDBF30A11	10/27/2019	5.75	2.75	0	G_and_A	Senior IC	IC	3	US	Customer	Pacific Sta	75	TRUE	TRUE	8:30	1

Guidance | 1. Raw query | 2. Calculate Average | 3. Assign to a bucket | 4. Calculate percentages

Power Pivot



Row Labels	Average of Meeting_hours_with_manager_1_on_1
002C04978DA8BAF151CFB4632D1F883DB2DD03CAA552537F59ABA27A09C4B077	0.384615385
003332D1C6FB58FC533F19E842E3FCE8D3963FD20BBB5E04213676456EE1162D	0.028846154
00368A5686BF3E6F5189540B9D1434DCDAB931A025E1DA3F73388C45A23B8814	0.365384615
004B67F97EFED1429EB002F0BC3719DA4FE57B4B6C399F02DEED70875024CA30	
00529B4A70E8C799A17FAC893BBE3032441392BEA44DC7CD1BD9720C20845225	
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00C2689E697E5A07B7615030498BE945C0CF6ACB2AB2E0C6BDEF84AC1CC5A271	
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0195A009924144793C016015F266EAA212163E25470D38A6C27A11F653B15B37	
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01D171D0BD43E73B882F0A547CDB02EE043447D35F4E7143C06E8604A100BB83	
01E33C5A68F2CF7000AA0BC183BE28CC0C56CB9BADA3558033EEA939F06B8CE8	
01F1E9EA632606BA7DD22745F0C1F3395A318855B9403C9A7C669AEB9B775466	
0248F8070D89F3CCDCA7274006516ECC173437A839531652A0BF1F41087A224E	
024BDDF8FB7C74EBC74C2A97AF92B3285E2DB672A62361E08B6D1892BE9BACCE	
0250022146CE0A7AC68A3B0C9DFE91E29234ECBB8609F752CC2EE1C3ADBEFF90	
0272D65614BB3B35DC21395BE4558E8982C5E82246F1448B534C088655C9B862	0.269230769
02879B0A7E05B5494CC6F7D95B592A6DA2558BF10240E4F7BD9FB84F853DC639	0.134615385
02943E668342920D43E282C443AA624F7C4BF21923F9199AC703487DDF766483	0.317307692
02A4F045322851 2D5FD089867957083 5D90ED60CFFDC98599EB90761EEE9D1A4	0.336538462
02AA047CB3B10885C8E067611132B2FEA9CF2CC22F74FB6D7E5C2C25EC8646A3	0.192307692
02C5AEE6DCA02C9C985D377D93232ACCA5174DFD91BA70E367163377FAB10D6D	0.614102564
02DE5C4C92F732A0DF8E4F9DA5B6458980E2E13D0FBB2F855782B59121979BBF	0.288461538
02F9A2042764216FE7847DDA4C8843CFEDDE707053D5F237143214EE95C23356	0.057692308
0302BD651D97D440EF9813FBC41197B89887A1E9C450837EECA88CD4BFB19141	0.519230769
032A341CD01F32618B500E0F3CD3B600CE42C576C4DA79B226C5AEB456808CF0	0.259615385
033CF79138E49775432110253EBF6D6C79C53451E58E79B13912F8A724548F4A	1
03497D4613E09AB1ED972E1CC88754B1645C1D28699E253BFBEA7828D0D7123C	0.067307692
0358DEF2813F6911B73AEE14183704051176 8BA66E3B0EA5BF3347C93D319213	0.326923077
038B10E4B9B01F5E81E2C21B887758EE37E8D8184F4E11F71EC768651EF12C5E	0.413461538
03DCEA9004E87E773886F165C74118475D264959D6C106E25EAE913902956799	0.125
040A70E1ADF19906B62118D384DDF4C68[illegible]C636B750	0.365384615

Value Field Settings

Source Name: Meeting_hours_with_manager_1_on_1

Custom Name: Average of Meeting_hours_with_manager_1_on_1

Summarize Values By | Show Values As

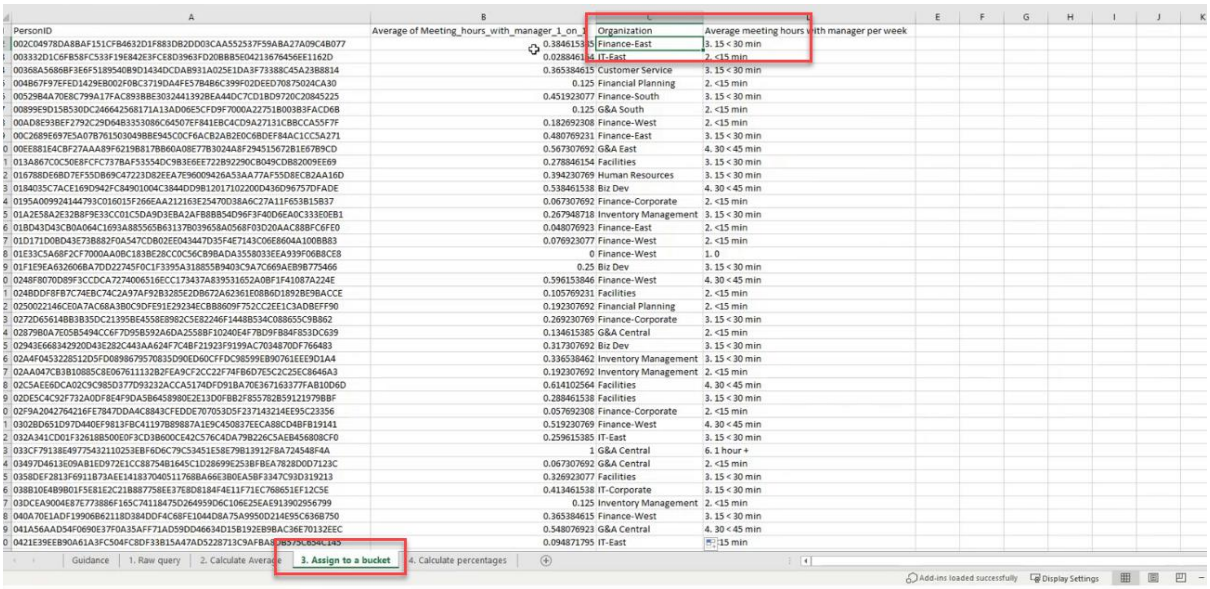
Summarize value field by

Choose the type of calculation that you want to use to summarize data from the selected field

Sum
Count
Average
Max
Min
Product

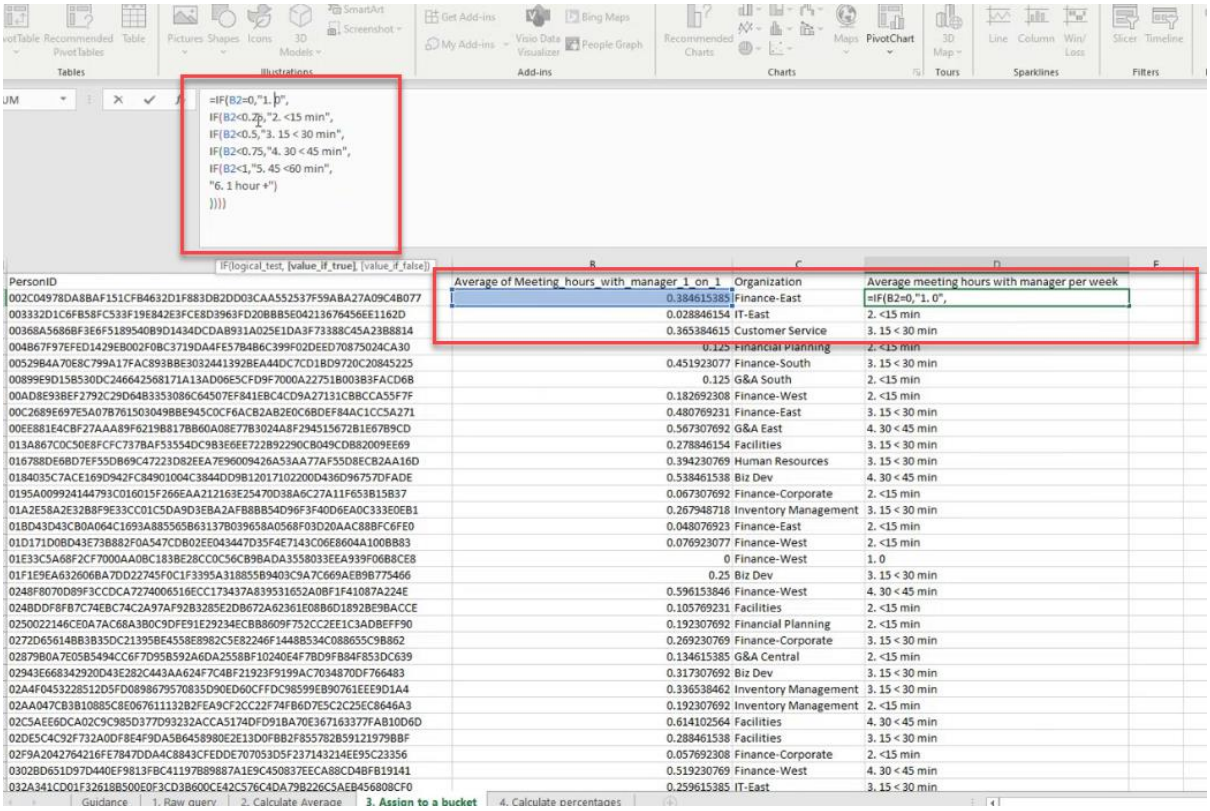
Number Format | OK | Cancel

Guidance | 1. Raw query | 2. Calculate Average | 3. Assign to a bucket | 4. Calculate percentages



PersonID	Average of Meeting_hours_with_manager_1_on_1	Organization	Average meeting hours with manager per week
002C04978DA8BAF151CFB4632D1F883DB2DD03CAA552537F59ABA27A09C4B077	0.384615385	Finance-East	3. 15 < 30 min
003332D1C6FB58FC533F19E842E3FCE8D3963FD20BBB5E04213676456EE1162D	0.028846154	IT-East	2. <15 min
00368A5686BF3E6F5189540B9D1434DCDAB931A025E1DA3F73388C45A23B8814	0.365384615	Customer Service	3. 15 < 30 min
004B67F97EFED1429EB002F0BC3719DA4FE57B4B6C399F02DEED70875024CA30	0.125	Financial Planning	2. <15 min
00529B4A70E8C799A17FAC893BBE3032441392BEA44DC7CD1BD9720C20845225	0.451923077	Finance-South	3. 15 < 30 min
00899E9D15B530DC246642568171A13AD06E5CFD9F7000A22751B003B3FACD6B	0.125	G&A South	2. <15 min
00AD8E93BEF2792C29D64B3353086C64507EF841EBC4CD9A27131CBBCCA55F7F	0.182692308	Finance-West	2. <15 min
00C2689E697E5A07B761503049BBE945C0CF6ACB2AB2E0C6BDEF84AC1CC5A271	0.480769231	Finance-East	3. 15 < 30 min
00EE881E4CBF27AAA89F6219B817BB60A08E77B3024A8F294515672B1E67B9CD	0.567307692	G&A East	4. 30 < 45 min
013A867C0C50E8FCFC737BAF53554DC9B3E6EE722B92290CB049CDB82009EE69	0.278846154	Facilities	3. 15 < 30 min
016788DE6BD7EF55DB69C47223D82EEA7E96009426A53AA77AF55D8ECB2AA16D	0.394230769	Human Resources	3. 15 < 30 min
0184035C7ACE1690942FC84901004C3844DD9B12017102200D436D96757DFADE	0.538461538	Biz Dev	4. 30 < 45 min
0195A009924144793C016015F266EAA212163E25470D38A6C27A11F653B15B37	0.067307692	Finance-Corporate	2. <15 min
01A2E58A2E32B8F9E33CC01C5DA9D3EBA2AFB8BB54D96F3F40D6EA0C333E0EB1	0.267948718	Inventory Management	3. 15 < 30 min
01BD43D43CB0A064C1693A885565B63137B039658A0568F03D20AAC88FC6FE0	0.048076923	Finance-East	2. <15 min
01D171D0BD43E73B882F0A547CDB02EE043447D35F4E7143C06E8604A100BB83	0.076923077	Finance-West	2. <15 min
01E33C5A68F2CF7000AA0BC183BE28CC0C56CB9BADA3558033EEA939F06B8CE8	0	Finance-West	1. 0
01F1E9EA632606BA7DD22745F0C1F3395A318855B9403C9A7C669AEB9B775466	0.25	Biz Dev	3. 15 < 30 min
0248F8070D89F3CCDCA7274006516ECC173437A839531652A0BF1F41087A224E	0.596153846	Finance-West	4. 30 < 45 min
024BDDF8FB7C74EBC74C2A97AF92B3285E2DB672A62361E08B6D1892BE9BACCE	0.105769231	Facilities	2. <15 min
0250022146CE0A7AC68A3B0C9DFE91E29234ECBB8609F752CC2EE1C3ADBEFF90	0.192307692	Financial Planning	2. <15 min
0272D65614BB3B35DC21395BE4558E8982C5E82246F1448B534C088655C9B862	0.269230769	Finance-Corporate	3. 15 < 30 min
02879B0A7E05B5494CC6F7D95B592A6DA2558BF10240E4F7BD9FB84F853DC639	0.134615385	G&A Central	2. <15 min
02943E668342920D43E282C443AA624F7C4BF21923F9199AC7034870DF766483	0.317307692	Biz Dev	3. 15 < 30 min
02A4F0453228512D5FD0898679570835D90ED60CFFDC98599EB90761EE9D1A4	0.336538462	Inventory Management	3. 15 < 30 min
02AA047CB3B10885C8E0676111132B2FEA9CF2CC22F74FB6D7E5C2C25EC8646A3	0.192307692	Inventory Management	2. <15 min
02C5AEE6DCA02C9C985D377D93223ACCA5174DFD91BA70E367163377FAB10D6D	0.614102564	Facilities	4. 30 < 45 min
02DE5C4C92F732A0DF8E4F9DA5B6458980E2E13D0FBB2F85578259121979BBF	0.288461538	Facilities	3. 15 < 30 min
02F9A2042764216FE7847DDA4C8843CFEDDE707053D5F237143214EE95C23356	0.057692308	Finance-Corporate	2. <15 min
0302BD651D97D440EF9813FBC41197B89887A1E9C450837EECA88CD4BFB19141	0.519230769	Finance-West	4. 30 < 45 min
032A341CD01F32618B500E0F3CD3B600CE42C576C4DA79B226C5AEB456808CF0	0.259615385	IT-East	3. 15 < 30 min
033CF79138E49775432110253EBF6D6C79C53451E58E79B13912F8A724548F4A	1	G&A Central	6. 1 hour +
03497D4613E09AB1ED972E1CC88754B1645C1D28699E253BFBEA7828D0D7123C	0.067307692	G&A Central	2. <15 min
0358DEF2813F6911B73AEE14183704051176BBA66E3B0EA5BF3347C93D319213	0.326923077	Facilities	3. 15 < 30 min
038B10E4B9B01F5E81E2C21B887758EE37E8D8184F4E11F71EC768651EF12C5E	0.413461538	IT-Corporate	3. 15 < 30 min
03DCEA9004E87E773886F165C74118475D2649590D6C106E25EAE913902956799	0.125	Inventory Management	2. <15 min
040A70E1ADF19906B62118D384DDF4C68FE1044D8A75A9950D214E95C636B750	0.365384615	Finance-West	3. 15 < 30 min
041A56AAD54F0690E37F0A35AFF71AD59DD46634D15B192EB9BAC36E70132EEC	0.548076923	G&A Central	4. 30 < 45 min
0421E39EEB90A61A3FC504FC8DF33B15A47AD5228713C9AFBA5D8575C854C145	0.094871795	IT-East	15 min

Guidance | 1. Raw query | 2. Calculate Average | 3. Assign to a bucket | 4. Calculate percentages

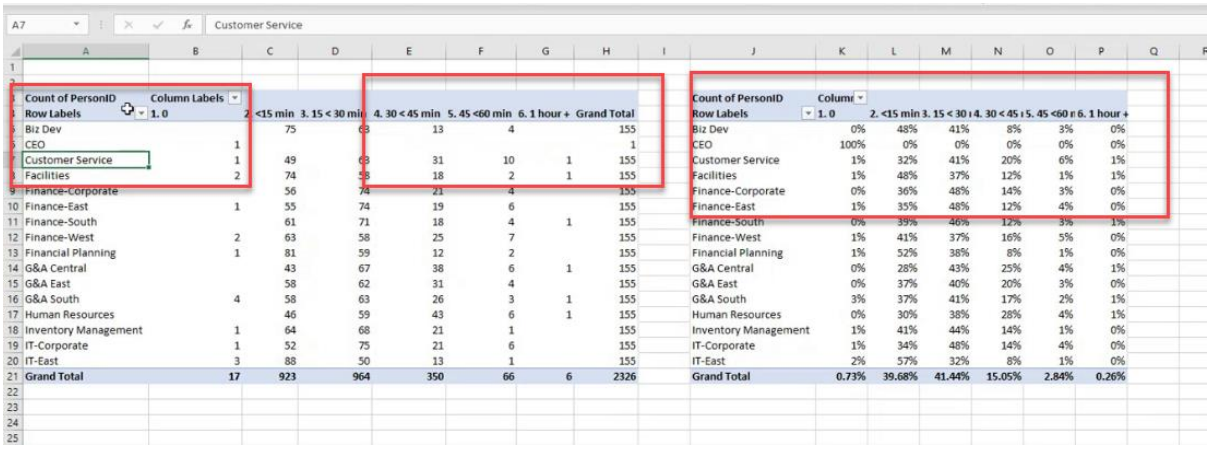


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IF(B2<0.25,"2. <15 min",
IF(B2<0.5,"3. 15 < 30 min",
IF(B2<0.75,"4. 30 < 45 min",
IF(B2<1,"5. 45 <60 min",
"6. 1 hour +")
))))
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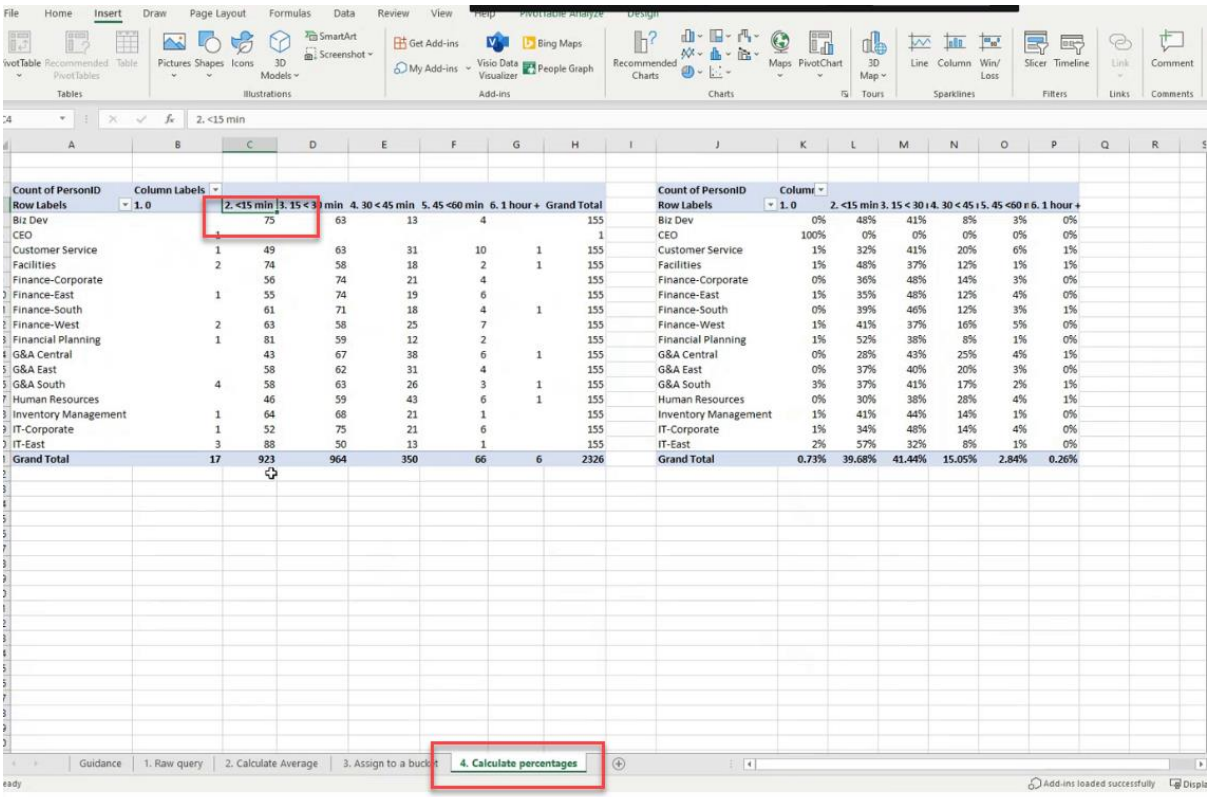
PersonID	Average of Meeting_hours_with_manager_1_on_1	Organization	Average meeting hours with manager per week
002C04978DA8BAF151CFB4632D1F883DB2DD03CAA552537F59ABA27A09C4B077	0.384615385	Finance-East	=IF(B2=0,"1. 0",
003332D1C6FB58FC533F19E842E3FCE8D3963FD20BBB5E04213676456EE1162D	0.028846154	IT-East	2. <15 min
00368A5686BF3E6F5189540B9D1434DCDAB931A025E1DA3F73388C45A23B8814	0.365384615	Customer Service	3. 15 < 30 min
004B67F97EFED1429EB002F0BC3719DA4FE57B4B6C399F02DEED70875024CA30	0.125	Financial Planning	2. <15 min
00529B4A70E8C799A17FAC893BBE3032441392BEA44DC7CD1BD9720C20845225	0.451923077	Finance-South	3. 15 < 30 min
00899E9D15B530DC246642568171A13AD06E5CFD9F7000A22751B003B3FACD6B	0.125	G&A South	2. <15 min
00AD8E93BEF2792C29D64B3353086C64507EF841EBC4CD9A27131CBBCCA55F7F	0.182692308	Finance-West	2. <15 min
00C2689E697E5A07B761503049BBE945C0CF6ACB2AB2E0C6BDEF84AC1CC5A271	0.480769231	Finance-East	3. 15 < 30 min
00EE881E4CBF27AAA89F6219B817BB60A08E77B3024A8F294515672B1E67B9CD	0.567307692	G&A East	4. 30 < 45 min
013A867C0C50E8FCFC737BAF53554DC9B3E6EE722B92290CB049CDB82009EE69	0.278846154	Facilities	3. 15 < 30 min
016788DE6BD7EF55DB69C47223D82EEA7E96009426A53AA77AF55D8ECB2AA16D	0.394230769	Human Resources	3. 15 < 30 min
0184035C7ACE169D942FC84901004C3844DD9B12017102200D436D96757DFADE	0.538461538	Biz Dev	4. 30 < 45 min
0195A009924144793C016015F266EAA212163E25470D38A6C27A11F653B15B37	0.067307692	Finance-Corporate	2. <15 min
01A2E58A2E32B8F9E33CC01C5DA9D3EBA2AFB8BB54D96F3F40D6EA0C333E0EB1	0.267948718	Inventory Management	3. 15 < 30 min
01BD43D43CB0A064C1693A885565B63137B039658A0568F03D20AAC88FC6FE0	0.048076923	Finance-East	2. <15 min
01D171D0BD43E73B882F0A547CDB02EE043447D35F4E7143C06E8604A100BB83	0.076923077	Finance-West	2. <15 min
01E33C5A68F2CF7000AA0BC183BE28CC0C56CB9BADA3558033EEA939F06B8CE8	0	Finance-West	1. 0
01F1E9EA632606BA7DD22745F0C1F3395A318855B9403C9A7C669AEB9B775466	0.25	Biz Dev	3. 15 < 30 min
0248F8070D89F3CCDCA7274006516ECC173437A839531652A0BF1F41087A224E	0.596153846	Finance-West	4. 30 < 45 min
024BDDF8FB7C74EBC74C2A97AF92B3285E2DB672A62361E08B6D1892BE9BACCE	0.105769231	Facilities	2. <15 min
0250022146CE0A7AC68A3B0C9DFE91E29234ECBB8609F752CC2EE1C3ADBEFF90	0.192307692	Financial Planning	2. <15 min
0272D65614BB3B35DC21395BE4558E8982C5E82246F1448B534C088655C9B862	0.269230769	Finance-Corporate	3. 15 < 30 min
02879B0A7E05B5494CC6F7D95B592A6DA2558BF10240E4F7BD9FB84F853DC639	0.134615385	G&A Central	2. <15 min
02943E668342920D43E282C443AA624F7C4BF21923F9199AC7034870DF766483	0.317307692	Biz Dev	3. 15 < 30 min
02A4F0453228512D5FD0898679570835D90ED60CFFDC98599EB90761EEE9D1A4	0.336538462	Inventory Management	3. 15 < 30 min
02AA047CB3B10885C8E0676111132B2FEA9CF2CC22F74FB6D7E5C2C25EC8646A3	0.192307692	Inventory Management	2. <15 min
02C5AEE6DCA02C9C985D377D93223ACCA5174DFD91BA70E367163377FAB10D6D	0.614102564	Facilities	4. 30 < 45 min
02DE5C4C92F732A0DF8E4F9DA5B6458980E2E13D0FBB2F85578259121979BBF	0.288461538	Facilities	3. 15 < 30 min
02F9A2042764216FE7847DDA4C8843CFEDDE707053D5F237143214EE95C23356	0.057692308	Finance-Corporate	2. <15 min
0302BD651D97D440EF9813FBC41197B89887A1E9C450837EECA88CD4BFB19141	0.519230769	Finance-West	4. 30 < 45 min
032A341CD01F32618B500E0F3CD3B600CE42C576C4DA79B226C5AEB456808CF0	0.259615385	IT-East	3. 15 < 30 min

Guidance | 1. Raw query | 2. Calculate Average | 3. Assign to a bucket | 4. Calculate percentages

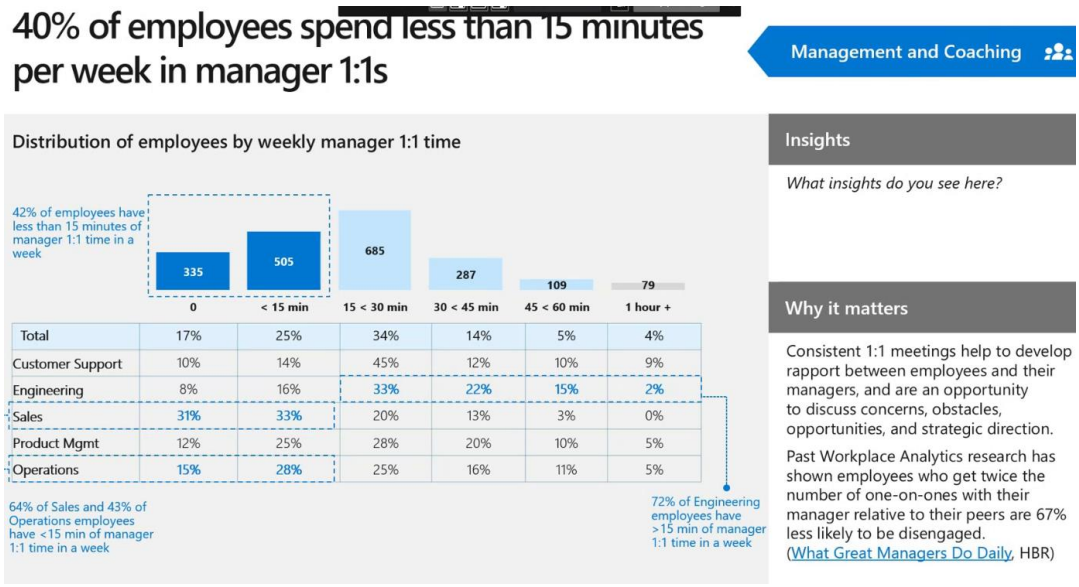
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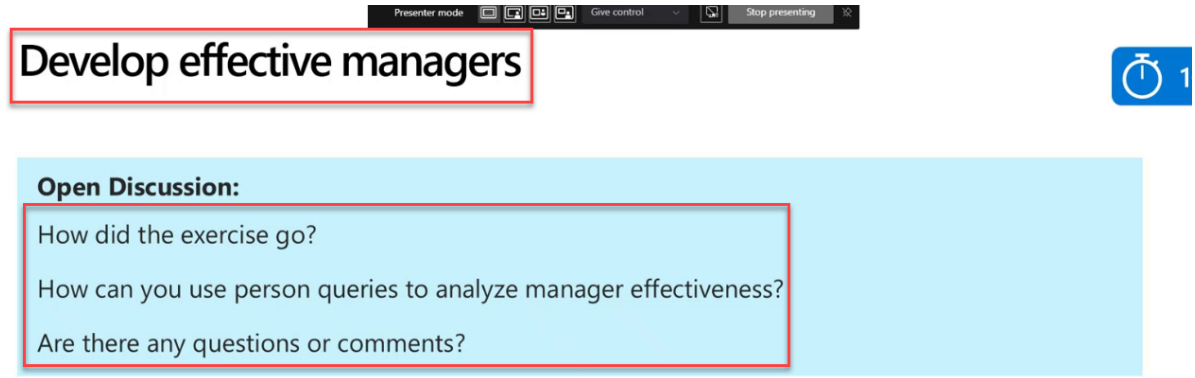
Count of PersonID	Column Labels						
Row Labels	1. 0	2. <15 min	3. 15 < 30 min	4. 30 < 45 min	5. 45 <60 min	6. 1 hour +	Grand Total
Biz Dev		75	63	13	4		155
CEO	1						1
Customer Service	1	49	63	31	10	1	155
Facilities	2	74	58	18	2	1	155
Finance-Corporate		56	74	21	4		155
Finance-East	1	55	74	19	6		155
Finance-South		61	71	18	4	1	155
Finance-West	2	63	58	25	7		155
Financial Planning	1	81	59	12	2		155
G&A Central		43	67	38	6	1	155
G&A East		58	62	31	4		155
G&A South	4	58	63	26	3	1	155
Human Resources		46	59	43	6	1	155
Inventory Management	1	64	68	21	1		155
IT-Corporate	1	52	75	21	6		155
IT-East	3	88	50	13	1		155
Grand Total	17	923	964	350	66	6	2326

Count of PersonID	Colum					
Row Labels	1. 0	2. <15 min	3. 15 < 30	4. 30 < 45	5. 45 <60	6. 1 hour +
Biz Dev	0%	48%	41%	8%	3%	0%
CEO	100%	0%	0%	0%	0%	0%
Customer Service	1%	32%	41%	20%	6%	1%
Facilities	1%	48%	37%	12%	1%	1%
Finance-Corporate	0%	36%	48%	14%	3%	0%
Finance-East	1%	35%	48%	12%	4%	0%
Finance-South	0%	39%	46%	12%	3%	1%
Finance-West	1%	41%	37%	16%	5%	0%
Financial Planning	1%	52%	38%	8%	1%	0%
G&A Central	0%	28%	43%	25%	4%	1%
G&A East	0%	37%	40%	20%	3%	0%
G&A South	3%	37%	41%	17%	2%	1%
Human Resources	0%	30%	38%	28%	4%	1%
Inventory Management	1%	41%	44%	14%	1%	0%
IT-Corporate	1%	34%	48%	14%	4%	0%
IT-East	2%	57%	32%	8%	1%	0%
Grand Total	0.73%	39.68%	41.44%	15.05%	2.84%	0.26%



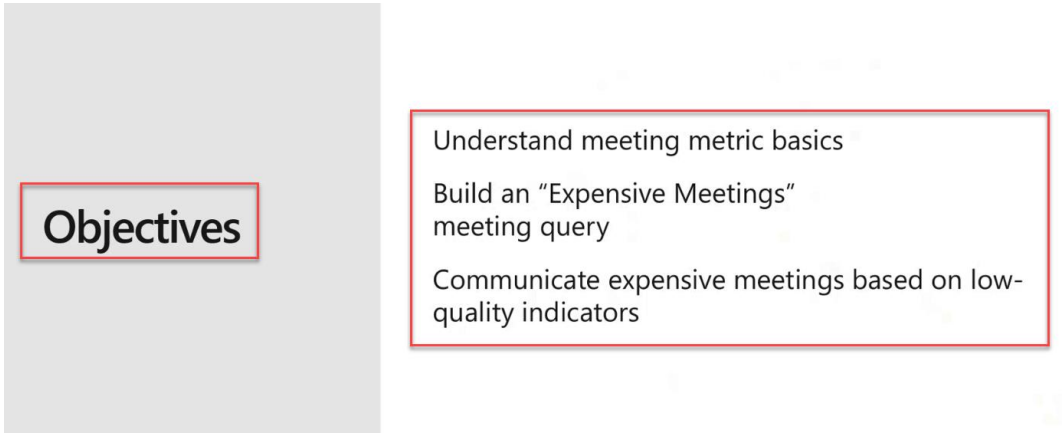
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Watch the Expensive Meetings training video

- Custom queries



- *Use case overview*

Use Case Overview: Expensive Meetings

Most Expensive Meetings provides leaders with visibility into costly meetings in the organization and gives them a simple, actionable insight and the opportunity to weigh in to ensure that time investments are aligned to their objectives for the team. Expensive meetings can be calculated in terms of time and actual cost.

List of "Expensive" meetings:

Selected high impact meetings with high multitasking rates
recurring meeting total hours are summed

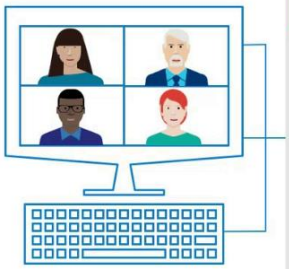
Subject	Total Attendee Hours	Emails Sent per Attendee Hour
Daily Standup Call	232	3.6
Weekly Customer Review	209	3.3
Pipeline Review	197	3.1
Design Brainstorming	173	2.9
Training Development	103	2.7
Analytics Office Hours	278	2.7
Biweekly Report Review	167	2.4
Excellence Forum	245	2.3
Sourcing Weekly Sync	109	2.2
Operations Review	118	2.1

Expense in hours and multitask rate

Meeting queries

Meeting Queries

Use a meeting query to analyze data from the meeting's point of view. Use meeting queries when you want to understand the relationship between different meeting attributes.



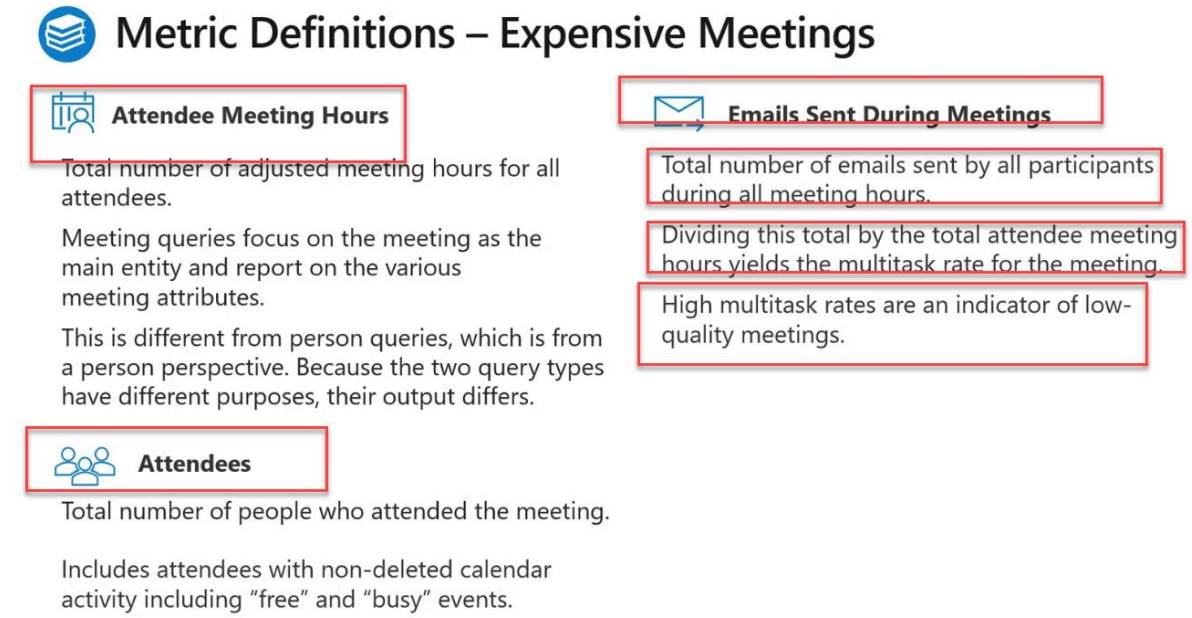
Use the meeting query to:

- Analyze metrics based on meeting attributes, such as duration, subject line, or if the meeting is recurring
- Examine meeting metrics based on organizer, attendee, and invitee attributes
- Use metrics such as attendees multitasking to identify and streamline inefficient or low-quality meetings

Meeting queries return a row-level list of single meetings.

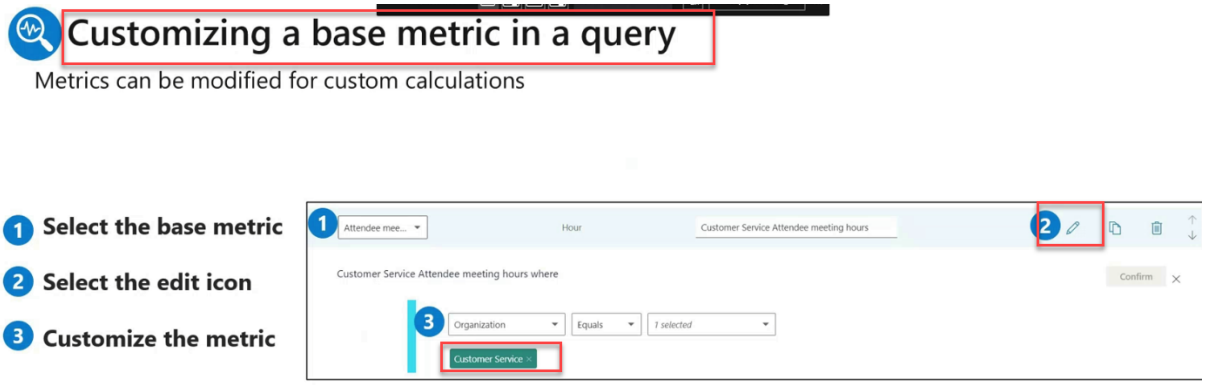
Each row includes:

- Meeting ID
- Start Date and Time
- Duration Hours
- Is Recurring
- Is Canceled
- Number meeting rooms reserved
- Alias of meeting room primary SMTP
- Total Number Emails Sent During Meeting
- Subject line
- Total Accepted/Declined/No Response
- Total Number of Double-Booked
- Meeting organizer organizational attribute
- Standard and customized metrics you specify



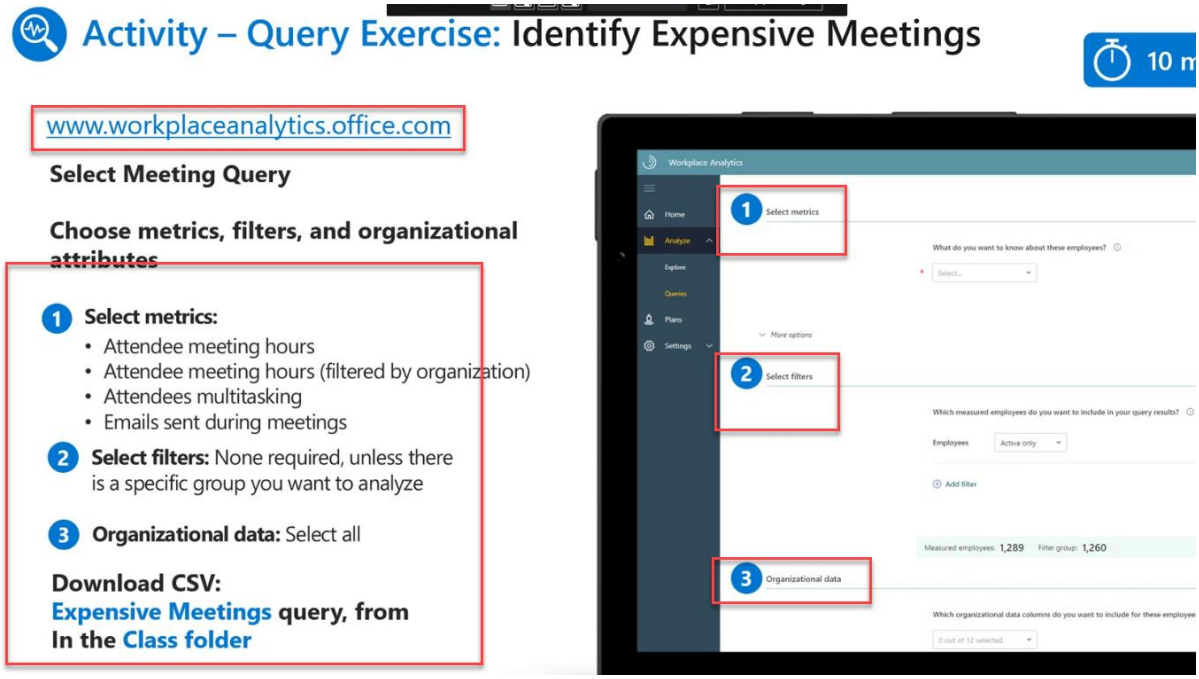
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Customize a base metric in query

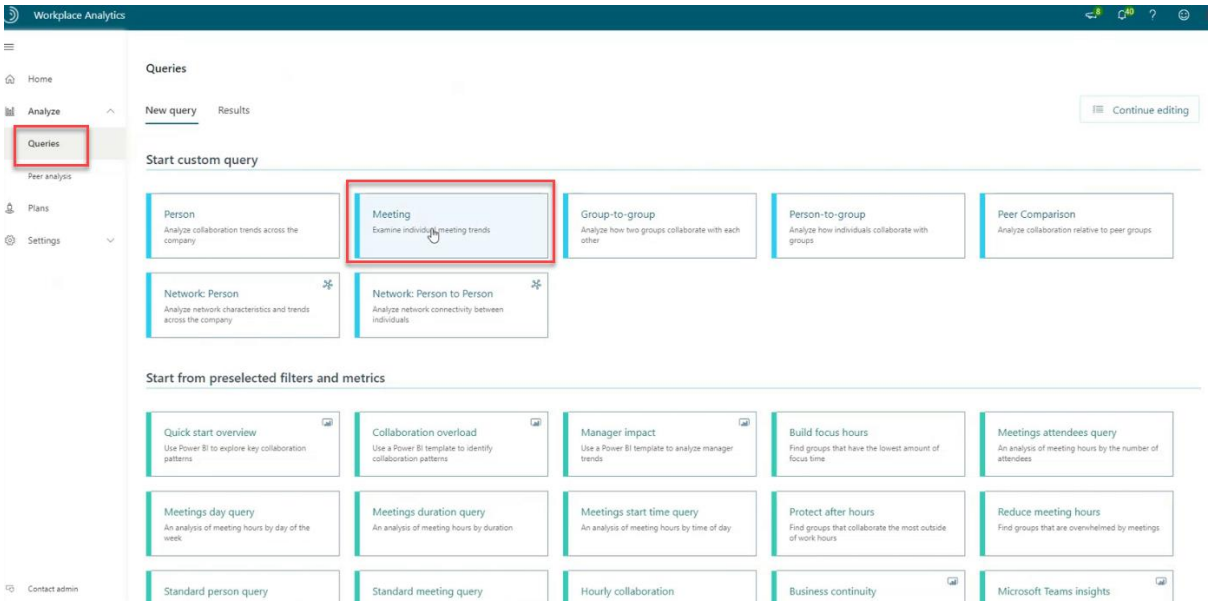


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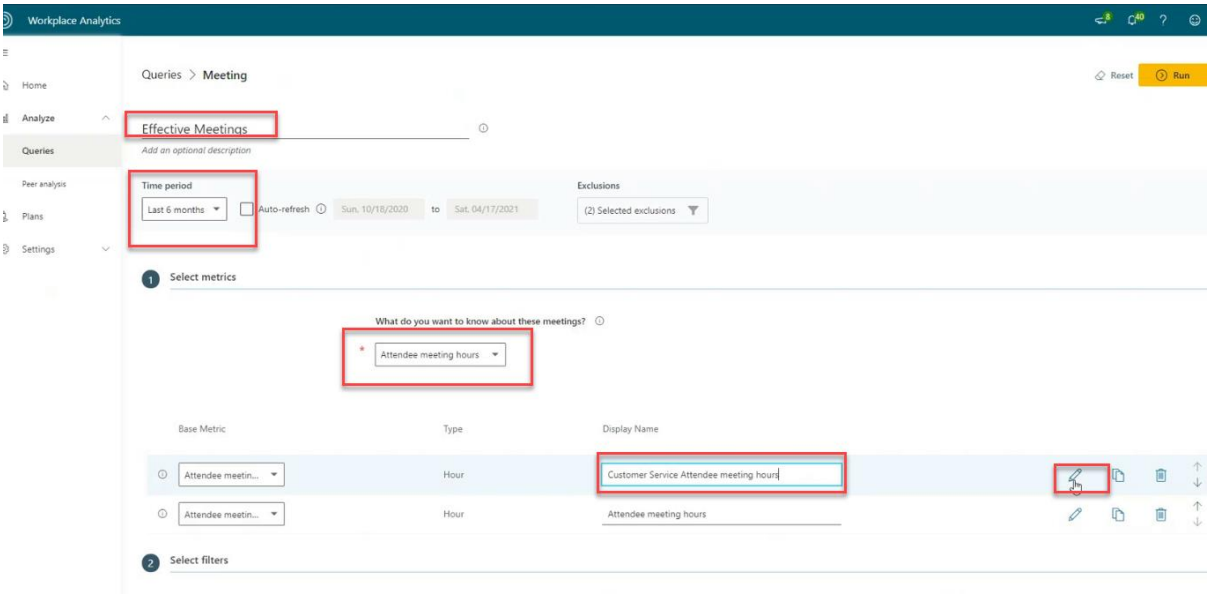
Activity: Identify expensive meetings



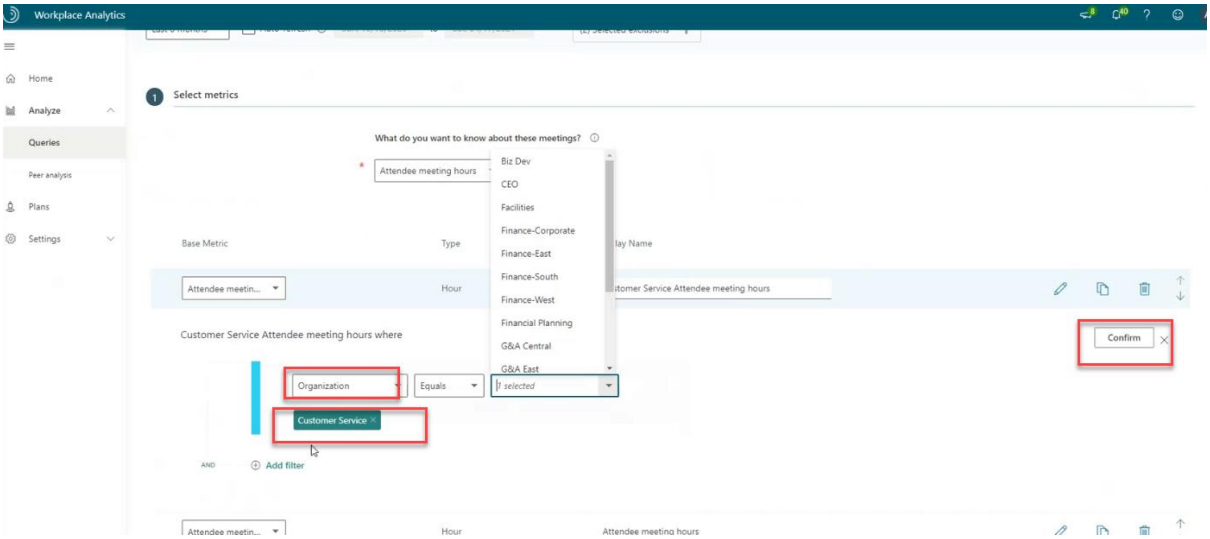
Ee

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- 1) Name the query, select time , type of metric, type Customer Service Attendee meeting in pencil icon

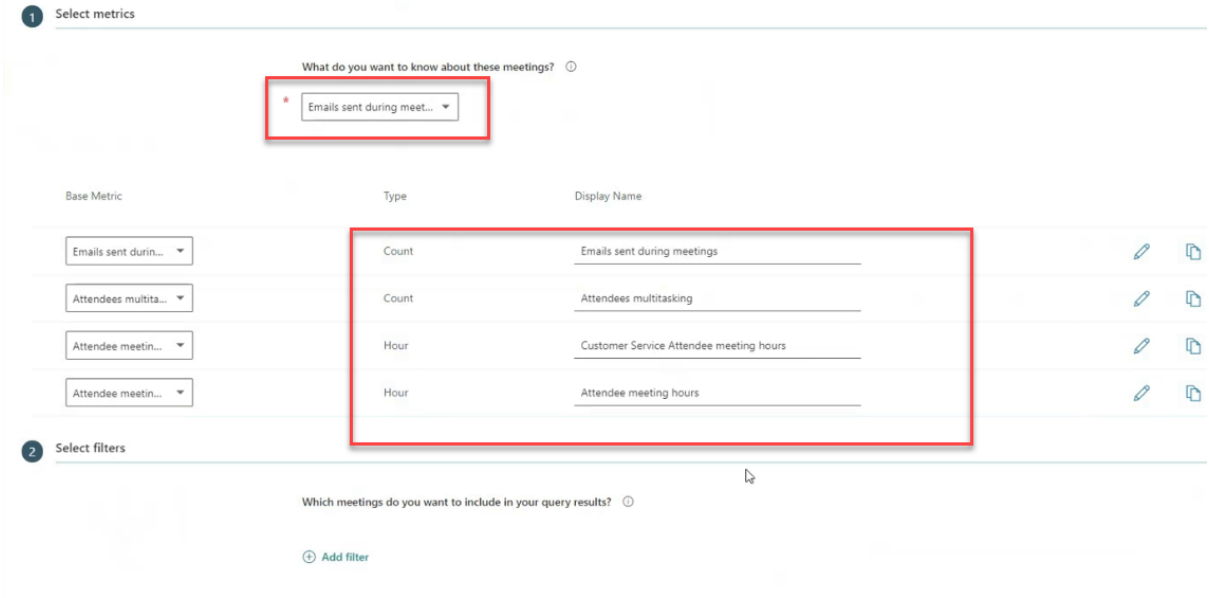


Add filter and choose any organizational data

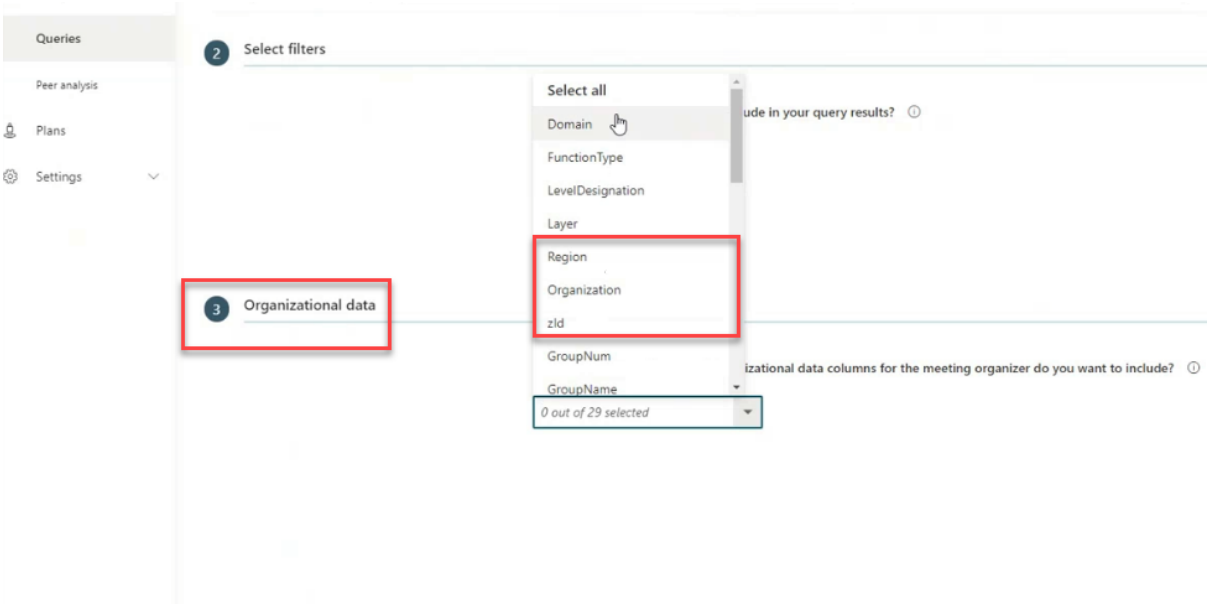


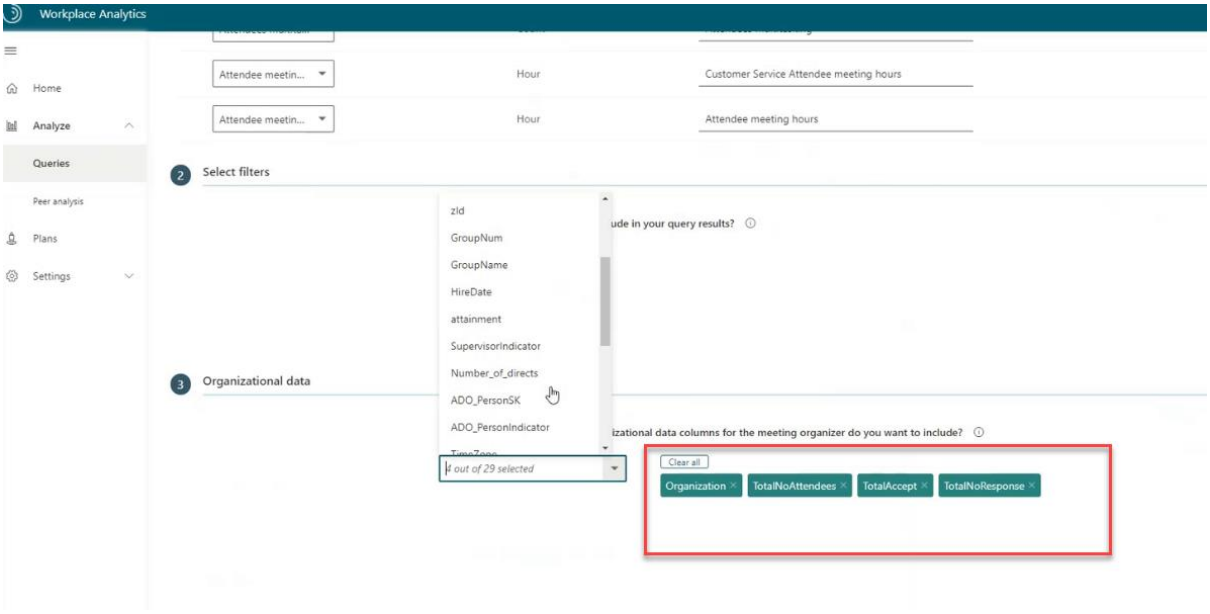
Add more filters such as Attendees multitasking, Email sent during meeting etc

dd

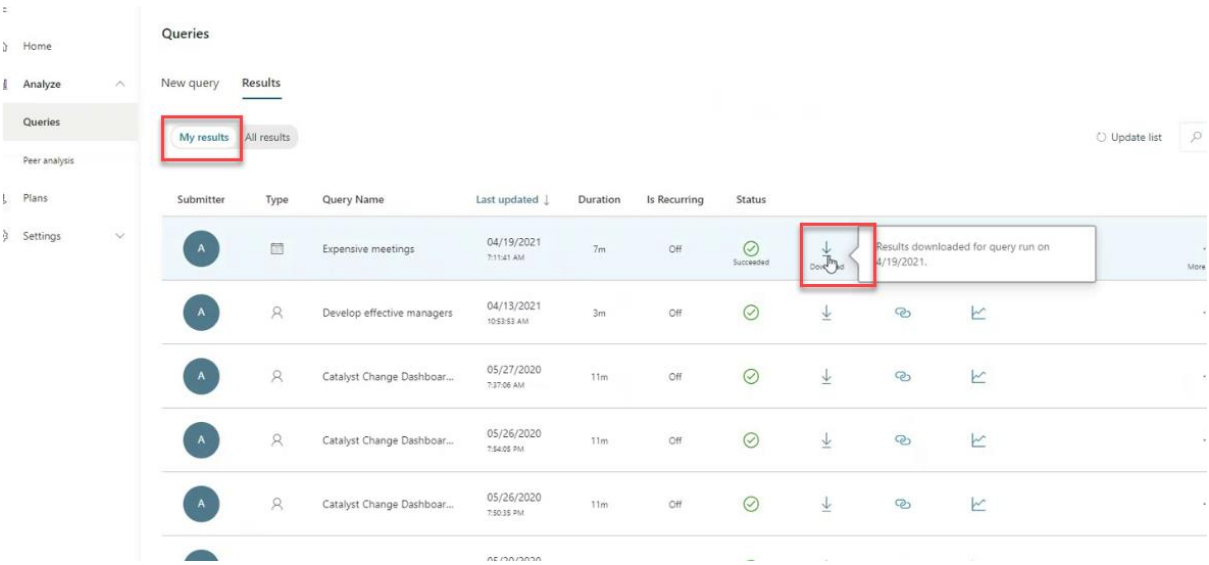


- Select **Organizational data**





- Download as CSV



- Or **Copy Link in Power BI.**

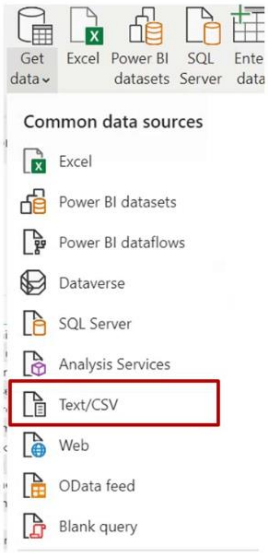
- Importing a CSV into Power BI

Importing a CSV into Power BI

Open Power BI

Select Get data> Text/CSV

The table will load for analysis

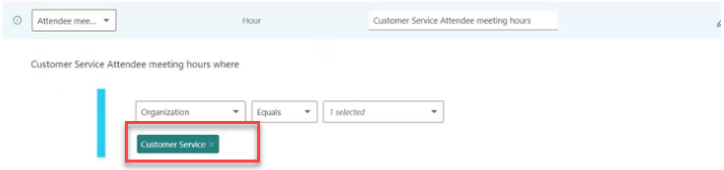


- Eee

Customizing filters

Metrics can be customized

For example Attendee meeting hours can be customized to show meeting hours where the organization of the attendee is customer service



- Activity Power BI Analytics Activity

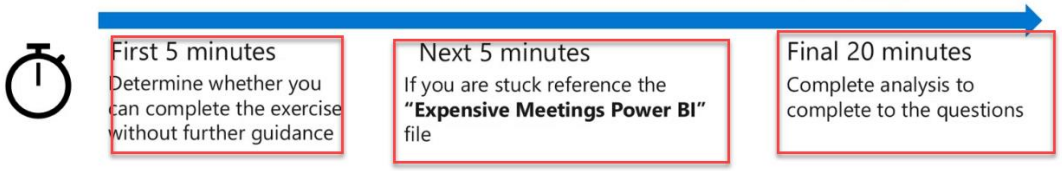
Power BI Analysis Activity: Identify expensive meetings

25 min.

1. Create a list of expensive meetings
   - Identify the subjects of the top 10 most expensive meetings
   - Identify the total attendee meeting hours sent during each of the meetings
   - Identify the number of attendees multitasking during each of the meetings

Note: If you don't have the Power BI application you can try this activity in another program or Excel

How well do you know how to use Workplace Analytics Queries



Expensive Meetings discussion

10 min

Open Discussion:

How did the exercise go?

How can you use meeting queries to analyze expensive meetings?

Are there any questions or comments?

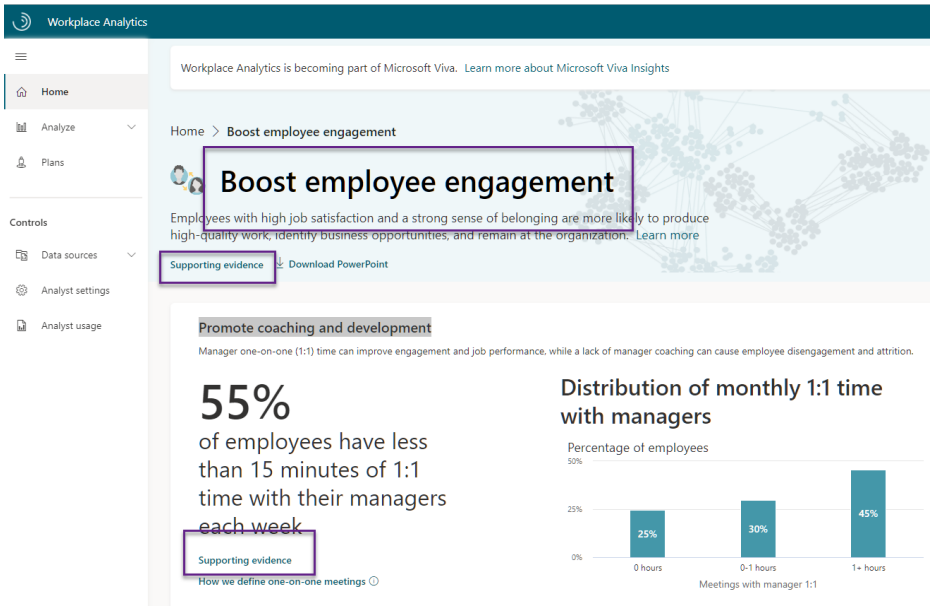
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References

2. www.workplaceanalytics.office.com
3. Microsoft Learn (Module 2)
   a) Ways of working assessment module
   b) *Discover Microsoft Workplace Analytics* module
   c) *Ways of Working Assessment* module
4. https://www.aka.ms/AssignWpALicenses
5. https://www.aka.ms/wpatrust
6. aka.ms/ost
7. aka.ms/dpa
8. aka.ms/onramp

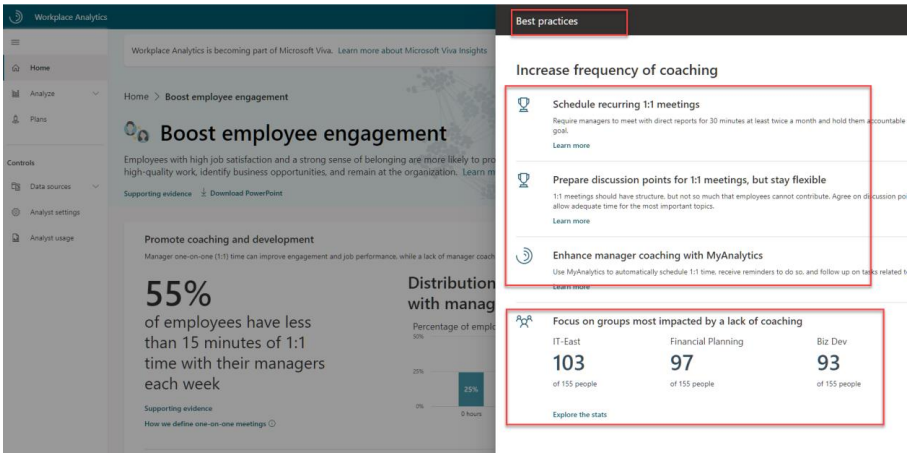
Global Benchmarks

Boost employee engagement



1. **Promote coaching and development**
   Employee engagement does more than boost s productivity [Engaged employees do more than boost productivity (microsoft.com)]
   If Employees are engaged then Organizations will get **22% higher productivity**

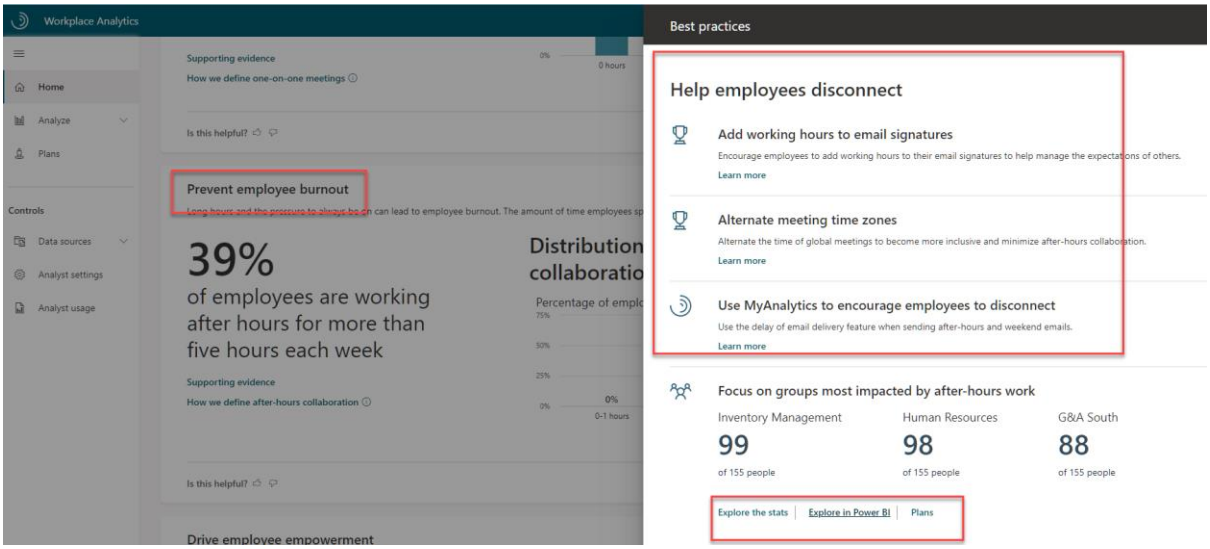
   - Distribution of monthly 1:1 time with managers [What Great Managers Do | Microsoft Workplace Insights]
     Employee engagement scores and Motivation is linked with manager. 70% of an employee's engagement is influenced by his or her manager.
     1-1 meeting would really help.
     Recommended **1 hour per month.**



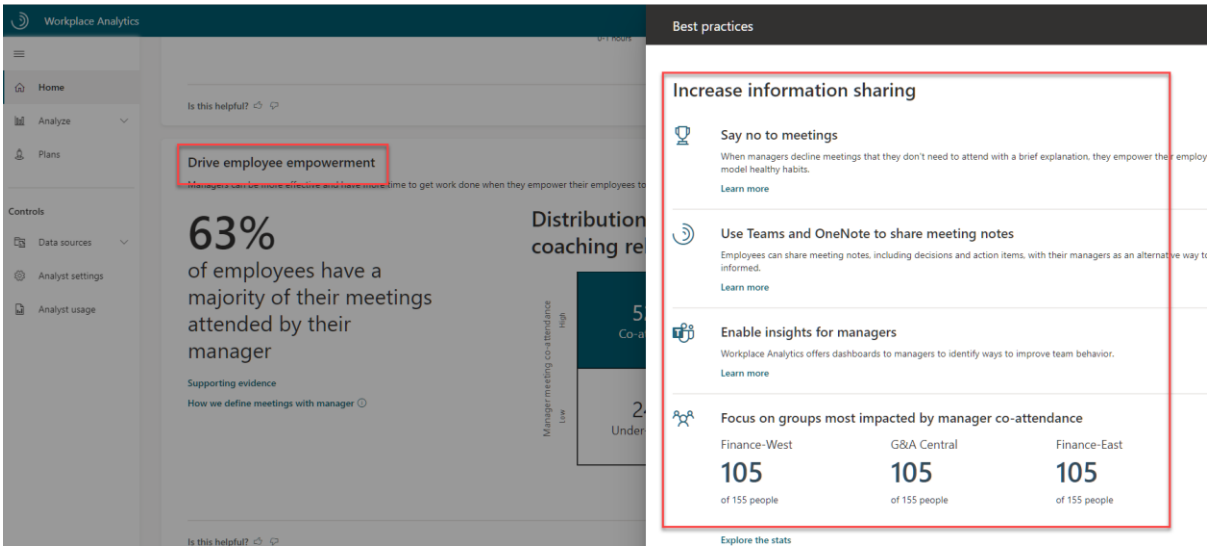
2. **Prevent employee burnout** - **[Help your team achieve work-life balance, even when you can't (microsoft.com)]**
   Nearly half of **human resource leaders** reported that **employee burnout** accounts for 20-50

percent of their companies' annual turnover.

40 % of our creative ideas come when we are **taking breaks** or allowing **our minds** to wander



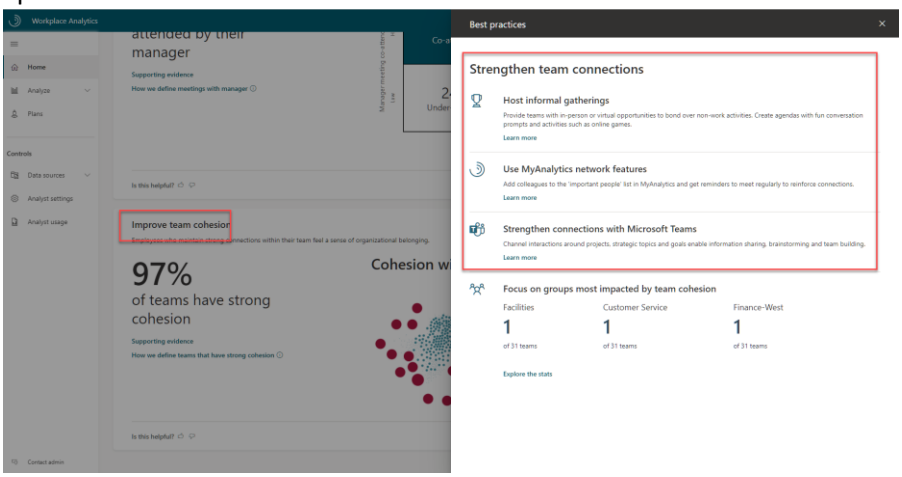
3. **Drive employee empowerment**
    - your team manage **its time well** is a critical factor
    - Set an **example**
    - Set **Goals**
    - Clarify **expectations**
    - Encourage open communication
    - Give **team members autonomy**
    - **Rethink meetings**
      Research Average of 30 minutes of 1-1 with you and your manager every 2 weeks



4. Improve team cohesion [High-performing teams need psychological safety: Here's how to create it - % (microsoft.com)]
    - There's no team **without trust**

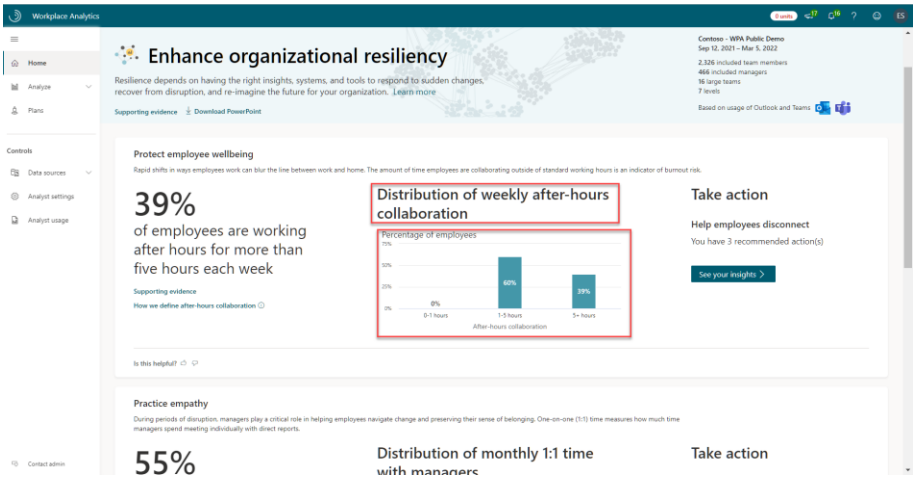
- Approach **conflict** as a collaborator, not an adversary

- Speak **human to human**



Enhance Organizational Resiliency

1. **Protect Employee well being** - After-hours Collaboration



testff

Nearly half of **human resource leaders** reported that employee burnout accounts for 20-50 percent of their companies' annual turnover. **40 %** of our creative ideas come when we are **taking breaks** or allowing **our minds** to wander