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## **Anticipating Training And Support Requirements For The New Microsoft Office User Interface**

A Commissioned Study Conducted By Forrester  
Consulting On Behalf Of Microsoft Corporation

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## Introduction

Microsoft will make its next version of Microsoft Office, the popular suite of applications that includes Excel, Word, Outlook, and PowerPoint, available to the public in early 2007. This new version represents one of the most significant changes to the vendor's office productivity package since Microsoft Office 1997. Changes include a new user interface, improved integration of client tools, and the introduction of a host of Microsoft SharePoint based collaboration and enterprise content management server capabilities.

While the new user interface promises significant end user benefits, the changes raise some concerns to IT managers currently evaluating or planning Office migrations. IT managers not familiar with the new user interface may ask questions such as:

- What key benefits will end users gain from the new version of Microsoft Office?
- What type and how much training will be required?
- What volume of help desk calls should an IT department expect when planning for the Office implementation?
- What are the best strategies for reducing user-interface-related help desk call volumes?

Microsoft commissioned this study to provide preliminary answers to these key questions by studying the experience of early user enterprises. The results of this study are designed to be shared with IT organizations. Forrester's key findings include:

1. Respondents believe that the new Microsoft Office user interface represents a substantial improvement over previous versions.
2. Respondents expect a short-term negative impact on end user productivity but believe long-term benefits will outweigh challenges.
3. Most respondents do not anticipate significantly increased demand on IT desktop support resources, other than costs to establish reasonable end user training programs, supported by ongoing self-service help based on Microsoft Office Online training content.

In addition to these key findings, Forrester has compiled a summary of lessons learned by these beta user enterprises for transitioning to the 2007 release and new user interface.

## **Study Methodology**

### **Company Overview**

Forrester conducted a series of 16 in-depth interviews with individuals overseeing use of the new version of Office client applications in their enterprises. Forrester's research team interviewed each participant for approximately 45 minutes. The research team looked for usage and support trends that spanned across most organizations.

Forrester interviewed a diverse set of companies. Sample companies included large multinational companies and small companies with a local/regional focus:

- Six had fewer than 10,000 total end users.
- Four had 10,000 to 100,000 total end users.
- Six had greater than 100,000 total end users.

Individual respondents were geographically distributed: Nine were located in the US, five in Europe, and two in Asia-Pacific.

### **Respondent Overview**

All of the respondents Forrester interviewed understood issues associated with the new user interface and spoke to the usability/training program considerations being made to support their Office adoption. Titles varied across interviews but included such titles as CIO, VP of strategic IT planning, IT department head, and IT consultant. All of the organizations interviewed had been using the new Office client applications for several months — the average use time was approximately nine months — and most had been working with Office client applications since the initial Alpha version was made available.

Forrester interviews focused on the experience of end users and their transition to the new user interface. We did not discuss issues related to installation and beta code stability.

Forrester's research team prepared all study questions and conducted all interviews. Microsoft provided the study's respondent set but was not involved in the interviews.

## Status Of Adoption

Most user companies were using the beta release of Office to understand what impact, if any, the new release will have on their IT organizations and end users. At the time of the study, these companies had implemented the early version of Office within their IT departments and/or small groups of functional or cross-functional business user groups relying heavily on Microsoft Office in their day-to-day work.

The composition of users included:

- Six organizations with more than 100 end users.
- Five companies with 20 to 100 end users.
- Five companies with fewer than 20 end users.

## General Study Findings

Forrester heard several key trends throughout the course of the 16 interviews. Unless otherwise noted, these trends applied across the general respondent population and were not significantly affected by such variables as company size, geography, or number of end users.

### **1. Respondents believe Microsoft Office's new user interface represents a substantial improvement over previous versions.**

Throughout the interviews, respondents identified high end user satisfaction with the new user interface. Respondents noted that end users like the user interface's new look and feel, saying it has a more "polished" look and is more "stylish" than previous versions of Microsoft Office.

Respondents also claimed that changes made in the new version did not overwhelm end users, and believe that most users who are familiar with Office 2003 will have little trouble in their initial navigations through the new version. For example, hot keys and many popular commands remain the same – (i.e., the "italics" command is still a slanted *I*, the "format bullets" command is still depicted by three bullets in a column), but the commands may be located in a new place.

Respondents commented that the new user interface improves the end user's experience with Microsoft Office's client applications by exposing users to functions that, while available, may have been less accessible to the average user in previous Office versions. They commented that the new "Ribbon" — the banner at the top of the client applications displaying functions and commands — was an improvement over the toolbars and menus found in previous versions. Respondents noted that the Ribbon allowed average users to more easily access

an increased number of high-value commands related to document publishing, spreadsheet formatting, and presentation graphics creation. In addition to the Ribbon, a few respondents noted that improvements to some core functions applicable to more advanced users, such as Excel pivot tables and PowerPoint charting, made the user experience more pleasurable.

When Forrester asked respondents what value and benefits they expect end users to receive from the 2007 Microsoft Office client applications, respondents commented that based on their preliminary experience, they expect: increased personal productivity, improved quality of interaction with the user interface, and the ability to create higher-quality deliverables (e.g., documents, spreadsheets, presentations) using the Office suite. No respondent was able to quantify these benefits with monetary or time metrics.

*“The new user interface makes it much easier to find things. It’s friendlier and more inviting, like Microsoft wants you to know how to do a few key things. Users love the ease of the drop downs [galleries], the new color palettes, and the enhancements in programs like Excel pivot tables and PowerPoint diagrams.” – IT consultant*

*“With the new version, users will be exposed to a much greater portion of the application’s total capability. They can accomplish their goals much more easily and are much more likely to find improved ways of doing things.” – Senior IT architect*

*“In the end, I think our users will have greater productivity. There are a lot of features and functionality that people weren’t aware of that will be easy to access. The value we see is that we’ll get a lot more utilization of the basic tools that currently exist within the programs.” – IT director*

## **2. Respondents expect a short-term negative impact on productivity but believe long-term benefits will outweigh challenges.**

Though the advantages of the new user interface seemed relatively clear, respondents believe that transitioning to the new user interface will present some challenges. In particular, respondents noted that users face a “learning curve” associated with the new user interface — one that they believe will not be difficult for the average user to overcome but will require the average user to re-learn how he or she accesses and uses some familiar commands and functions.

Most respondents initially expected little impact to their more advanced Office users. However, these respondents now believe that the new user experience may affect these more advanced users the most, since many commands that have become “second-nature” to these advanced users may be in new locations. The consensus among respondents was that the changes may result in some initial

advanced user frustration as these users become accustomed to the new user interface. Respondents believe that their IT managers may hear questions such as “why did Microsoft change this . . . I didn’t think it was broken” or “why have they moved things around on me just when I was getting used to it” from these more advanced users.

Most IT managers we spoke with claimed that the learning curve would be short-term, stating that users who take the time to find their core group of commands and functions and have a little patience were satisfied with the new user interface soon after their initial training. Further, respondents claimed advanced users may be more likely to gain long-term benefits from the changes. As noted, Microsoft’s improvements to Excel pivot tables and PowerPoint diagramming, popular functions among more advanced users, were cited as significantly improved in this version of Office.

At the other end of the spectrum, average users of Office — those using common functionality — were the users who found it easier to adapt to the new user interface. Feedback from these end users indicated that they were more likely to access new functions and experienced improved ease-of-use.

While the exact time frame will vary, most respondents expected an average user to take one to four weeks to become “very comfortable” with the new user interface, though this will depend on the individual end user and the amount of initial training received. Most respondents expect to provide end users with some structured training. It should be noted that most of our respondents were users of Office 2003 or XP. Forrester spoke with two respondents at companies that were Office 2000 users who expected the transition to be more difficult.

Forrester explores methods for reducing the impact that the transition will have in the “lessons learned” section of this document.

*“The general consensus is that there is a learning curve that takes a few weeks to get completely over. During that period there’s going to be some frustration because users have to hunt around for things. Once people get used to the new Ribbon, they realize it’s a great system and people don’t want to go back.” – IT manager*

*“It took a little while for the more advanced users to get used to the changes. They became much more satisfied with it after about a week of using it — they converted from being a bit frustrated with the user interface to being pretty positive.” – Deployment executive*

*“Beginner and intermediate users loved the new interface because it exposed the basic functionality of Office much better than previous*

*versions. They can do the basics — fonts, colors, tables, etc. — very easily.” – VP and director of strategic planning*

**3. Most respondents do not anticipate significantly increased demand on IT desktop support resources, other than costs to establish reasonable end user training programs, supported by ongoing self-service help based on Microsoft Office Online training content.**

Forrester asked respondents to try to estimate or quantify the impact that transitioning to new Office client applications would have on their IT organizations — in terms of dollars allocated to training and/or the anticipated increase in IT help desk call volumes. In most cases, respondents noted that it was too early to say with clarity what the impact would be — they could not quantify their resource requirements as they moved from a small group of beta users to broader use in their organizations and were hesitant to guess. Thus, the findings in this section are based on their comments and estimates.

When asked to estimate the impact the implementation of the new version of Office would have on IT resources, the majority of respondents did not anticipate a substantial impact. While some companies predicted an initial rise in help desk call volume, they expected the number of calls to return to normal shortly after the initial trial. Forrester heard respondents say that help desk call volume could increase during the initial implementation stages (typically first few weeks) — though respondents had difficulty distinguishing between calls related to installation/integration issues and calls related to new user interface.

Almost all of the organizations Forrester spoke with were planning to rely on existing IT resources to manage the increase in help desk call volumes. Very few companies were adding incremental resources, though a few of the largest organizations were considering adding one to two incremental IT headcount or temporary IT workers to help support their transition. Companies that outsource their help desk work to third-party vendors expected to rely on their outsourced service providers to staff appropriately and did not expect to incur substantial additional costs.

Overall, the greatest “cost” organizations expected was related to lost productivity as employees experiment with and get accustomed to the new user interface. As noted, this cost was difficult for most organizations to quantify. Many respondents stated that users would be productive after a few hours of training and/or experimenting, and expect that within one to four weeks these same users would be “very comfortable” with the new user interface.

Many of the organizations we spoke with planned to rely on Microsoft training tools to provide users with “self-service” training resources. They expected these to reduce the impact on the IT helpdesk and the amount of lost productivity.

The concern about lost productivity was most acute in companies that have a greater intensity of Office use and in companies that use Microsoft applications in highly analytical operations. For example, a large financial services company relying heavily on Microsoft Excel for complex financial modeling is likely to face a more difficult transition to the new version of Office than companies of similar size relying on Microsoft Office applications for general information work.

*“If the users always call the help desk when they have a question, we might anticipate several calls to the help desk per person in the first week. But I don’t think people call every time they have a problem — I think users will rely on more informal channels to get help from their coworkers, rather than through official channels.” – IT Consultant*

*“Everything related to the transition will be handled with existing, internal resources. If we come out of the initial pilot and everyone is having significant difficulty, then we might have to get some external training, but I don’t see it coming to that.” – IT Architect*

## Lessons Learned

Some organizations Forrester spoke with were positioning themselves to implement the new version of Office in a manner that would result in minimal end user disruption. These organizations had carefully considered their organizations’ reliance on Microsoft Office client applications, designed customized training programs leveraging Microsoft’s Office online training materials, and were planning clear consistent communication about the benefits of the new Office suite. Forrester has outlined “lessons learned” from these organizations below:

1. Assesses the organization's reliance on Microsoft Office

Forrester did not observe significant differences in UI-related challenges by company size or number of end users. Several of the largest organizations we interviewed faced the same challenges as their smaller counterparts. Instead, Forrester found the key issues in anticipating challenges related to how intensely workers rely on Office client applications for highly analytical activities and core business operations. This finding also implies that more advanced users may be the users who will benefit the most from structured training sessions. Ironically, these may be the users who think they need the least training in the transition.

Based on these findings, Forrester believes that planning for implementation should start with an enterprise-wide self-assessment. Companies should carefully answer such questions as:

- What percentage of the company relies on Microsoft Office for highly analytical purposes?

- How are core business operations affected by workers' proficiency in Microsoft Office?
- How willing is the company to allow users to experiment and “self-solve” the challenges that may be posed by this transition, even when this may require some loss of productivity?

Companies that believe a large percentage of their user base to be more heavily reliant on Microsoft Office in highly analytical and business operations activities should consider more in-depth, structured training programs. These programs should include more advanced users.

## 2. Leverage Microsoft's training tools and resources

Throughout interviews, respondents noted that end users exposed to Microsoft training tools had a more positive experience with the new user interface and felt that they were better positioned to overcome initial user hurdles. For example, interviewees that leveraged Microsoft training materials (such as 7-minute training video, online training tools, etc.) had more positive feedback on the product.

With these tools at their disposal, end users had a road map with which to navigate the interface changes and had a better understanding of why key changes to the Office client applications were made. Using the Microsoft training also prepared users for the “excitement” of experimenting with the new product. Some respondents were surprised at the breadth and depth of the online tools available to them, noting that these tools are an upgrade over the tools available in previous versions of Microsoft Office.

*“There is quite a bit of richness and breadth of training that Microsoft offers online for the 2007 products. They are very strong.” – IT director*

*“With the Enterprise Learning Framework that Microsoft provided, we've been targeting users with emails before changes are made and with appropriate follow-up, and we're finding that is working quite well. . . That coupled with the 2-hour training session should make this whole transition much more effective.” – Chief information officer*

## 3. Integrate Microsoft's training tools and resources with user-specific materials

The most prepared organizations we spoke with were using the new version of Office to understand the unique challenges it would pose for their organizations. In these early-use cases, companies were considering factors such as level of Office awareness, distributed versus centralized users, level of reliance on Microsoft Office (general use versus very specific applications), and which users would be

most likely to be excited about the Office transition. A few organizations were starting their early use with a set of “first responders” or “evangelists” or “interested early adopters” to generate excitement about the program and minimize disruptions.

Once organizations had analyzed their user base, they were able to create targeted, custom training programs. These custom programs were seen as critical, since Microsoft’s online training tools cannot anticipate every organization’s unique needs. Particularly for advanced users, or highly specialized functions within a business, the Microsoft training tools may not go to the level of depth required to fully reduce transition challenges.

To fully leverage the training resources Microsoft provides, most organizations were planning for 60-minute to half-day in-person end user training, whenever possible. One IT manager noted the importance of getting advanced users into training sessions, since these users may be the most affected by the changes. Most managers were planning to provide quick reference cards or other custom training materials that would walk people through common user issues — and to make these cards specific to their organizations whenever necessary.

#### 4. Create clear, consistent employee communications about upgrade plans and anticipated benefits of the new user interface

One of the easiest and most effective tactics that companies were using to prepare for the new version of Office was proactive employee communications: making end users aware of how the transition would affect their daily business activities and communicating the level of challenges they might face.

These internal employee communication campaigns had the effect of generating excitement among the end user groups before the transition and preparing users for the change. Though not every organization Forrester spoke with was actively working on such communications, the respondents that were felt more confident that they were preparing their users for the changes that lie ahead. The type of organization implementing these programs varied: Campaigns were being rolled out at very large organizations with significant IT marketing & communications budgets and at small organizations that were planning for simple, informal communications to users.

A key aspect of these marketing programs was creating highly visible, consistent communication through traditional company resources:

- Corporate Web sites: corporate intranet, “Transition Web sites,” self-service pages.

- Email communication: education campaigns before, during, and after the transition.
- In-person campaigns: posters, displays of the new UI in the hallway or cafeteria.

*“The goal is to make users feel that they are getting a better product when they move to this new tool. We need to get them excited about the capabilities and make them anticipate the value before they even experience it . . . . It’s about creating the buzz around it.” –Innovation director*

*“We set up a help desk session in the hallway for users to stop by and experiment with the new applications. It was a small cost in terms of getting the hardware set up and should get people used to the new functions and commands. It also creates some excitement.” – Manager, IT services group*

## Conclusion

The early adopters Forrester interviewed believe that the significant user interface changes improve the user experience and allow users to access a larger portion of existing Office functionality. Throughout Forrester’s interviews, respondents claimed that there was high user satisfaction with the new user interface, and after their initial training period, few users wanted to return to their previous versions.

Nonetheless, any transition involving the heavily used Office Suite is likely to present challenges. While most users should recognize the same commands and functions that were available to them in previous versions of Microsoft Office, some re-learning will be required. The most advanced users of Microsoft Office, for whom access to more advanced commands and functions has become “second nature,” may have the most difficulty getting adjusted in the near term.

Careful planning is the key to success in any transition. The respondents Forrester spoke with that were anticipating challenges, communicating the benefits of the transition, leveraging Microsoft training tools, and creating custom training programs appeared to be more strongly positioned for a smooth transition to the new user interface. For these companies, the challenges associated with transitioning to the new version of Office were relatively minor compared with the anticipated business benefits.