Microsoft Workplace Analytics

Manager Insights Rollout Guide

Define the strategy

1 | **Define objectives**

2 | **Select participants**

3 | **Roll out approach**

Define objectives

As with every initiative, before getting to work, it's essential to define the objectives you want to achieve. This ensures a program that is focused, adds value, and is relevant to your leaders and employees.

Identify relevant stakeholders

Gather a group of stakeholders that will define and own the overall objectives for this program. Ideally, choose from a selection of relevant roles, such as the following:

- **HR leader** - Owns the employee experience and leadership development in your organization

- **IT leader** - Owns the tools and systems that support implementation

- **Business leader** - Owns business outcomes and can tie value from this work to broader strategic intent

- **People leaders** - Represent the people managers in your organization

Brainstorm and agree on objectives

Spend some time exploring possible objectives for the program. A structured brainstorming session is a good way to get a working list. Make sure you document the objectives you agree on, but also those that are explicitly out of scope. It might be a good idea to create a program charter at this stage.

Try this

Tying objectives to existing business initiatives and priorities is a great way to ensure the program remains relevant and isn't seen as "just another initiative" that has limited value or longevity:

- Write down all existing strategic priorities, challenges, and initiatives that are applicable to your organization's leaders for the current planning horizon.
- Does the program support attainment of any of those? Which specific elements resonate most strongly? What are the possible conflicts?
- What formal or informal sentiment information do you have that could be relevant to this decision?

Test your objectives

Make sure your objectives are clearly defined and deliver business value.

Define success criteria

Consider the following questions:

- How will you know if the program is accomplishing its objectives? Do you have intermediate milestones you can track? What outcome metrics can you use to track progress?

- How will you know when you achieve success? What will that look like?

More specific objectives will have quantitative success measures, while more loosely defined ones will need to rely on subjective judgement.

Loosely defined objectives   Clearly defined objectives

Qualitative success measures   Quantitative success measures

Try this
Your organization might already have a defined process to set goals and objectives for programs. In this case, use the framework already in place to ensure that the existing governance processes can be applied seamlessly.
If not available or applicable, any standard framework for objective setting will be a helpful tool in testing objectives, such as a SMART objective test (**S**pecific, **M**easurable, **A**chievable, **R**elevant, **T**imely).
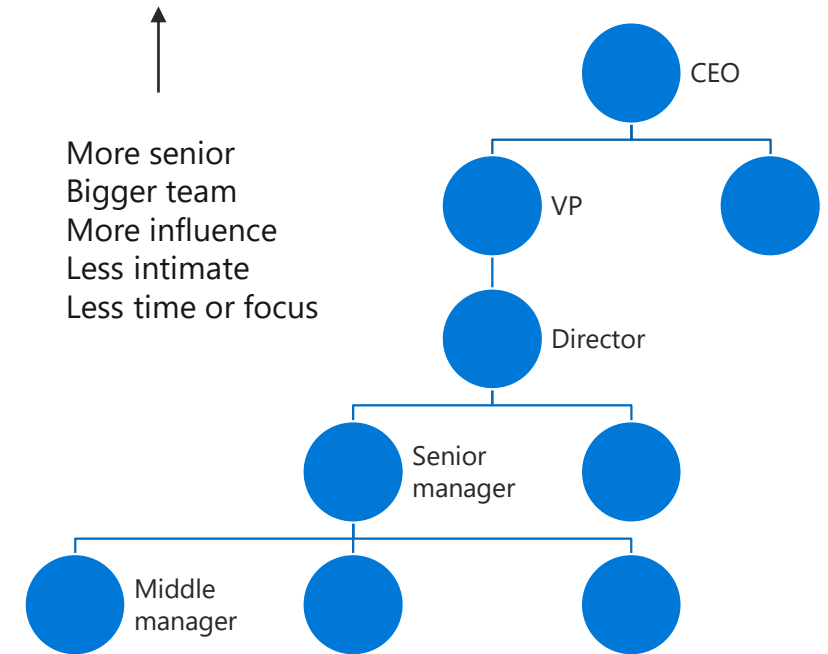
Select your target manager population

You can now choose the target manager population, which is your participant group. The optimal group depends on the objectives of the program and your organization's structure and culture.

Workplace Analytics data requires the following:

- Confirm that the latest organizational hierarchy is reflected in the Organizational data uploaded into Workplace Analytics.

- A manager must have 9 or more employees in their team.

- A manager's team includes everyone below them in the hierarchy (immediate reports plus their reports and so on).

- For optimal results, consider at which level of the organizational hierarchy defines your managers.

More senior
Bigger team
More influence
Less intimate
Less time or focus

Less senior
Smaller team,
Less influence
More intimate
More time or focus

CEO

VP

Director

Senior manager

Middle manager

Try this

How do you know if you've selected the right level in the hierarchy for your manager persona? There is no formula for this. Instead, try the following:
- Imagine you are the manager in question – how will you react to this program? How do the objectives relate to your day-to-day work and priorities?
- What sort of conversations will you have with your reports as a result of this?
- What about with your leaders?

Agree on your rollout plan

Do you start with a pilot first or a full rollout?

Pilots are an excellent way to test a program before going big. But it's important to know what you want to test before the pilot starts. Most importantly, make sure your test criteria extends beyond a simple technical evaluation.

The following are the more common areas to test:

- **Technical tool evaluation** - *Does the tool work as expected?*

- **Privacy and data protection** - *Are you confident that how the data is managed and shown protects individuals' privacy and can you reassure employees that their privacy is protected?*

- **Understanding and validity** - *Do managers understand how to use the tool and interpret the data how it is intended? Is the guidance provided or planned sufficient? Do you need to document or explain how to use Microsoft 365 tools required for the rollout?*

- **Business value realization** - *Can you see a clear path to attaining the agreed objectives for the program? Do any of them need to be revisited? Are there any additional steps that should be planned to maximize value?*

If deciding to pilot first, make sure you agree and document which tests the pilot must satisfy, and how long the pilot will run for. Also thoughtfully choose your pilot population. A pilot can be an effective way of creating internal testimonials that you can use to promote adoption during a full organizational rollout.

Try this
- Mentally fast forward to the end of the pilot. It was a huge success, and you are now gathering one or two success stories to include in the communication for the broad rollout.
- Write the story you will tell, as if it was an intranet article. Include a headline, the main findings, and a few quotes. Now go back to your pilot design and check if your pilot will deliver the necessary results.

Set up and launch the program

1 | **Program roles**

2 | **Program structure**

Executive sponsor

The executive sponsor is an influential senior leader who actively promotes the value of developing better management habits.

Core responsibilities

- Participate in defining and communicating the goal's purpose.
- Remove obstacles in the way of the team's success.
- Build excitement for the program.
- Participate in select program activities.
- Serve as a role model for behaviors that you want to promote.
- Encourage managers to participate and support the change.

Program manager

The program manager is the main architect of the program and leads implementation.

Core responsibilities

- Secure support from an executive sponsor.
- Identify, train, and manage change agents.
- Remove any obstacles that might affect the team's success.
- Lead program communications and regularly reinforce the program's purpose.
- Structure the change program and lead activities.
- Lead discussions and idea sharing at check-ins and through collaboration channels.
- Collect, manage, and analyze program feedback and data.

Change agents

Change agents are influential leaders who help drive program awareness and engagement. They are great communicators, enthusiastic and forward thinking.

Core responsibilities

- Amplify program communications.
- Build excitement for the program.
- Champion Workplace Analytics managers and act as internal product experts.
- Lead select program activities, such as program check-ins.
- Prime discussions and idea sharing through collaboration channels.
- Collect and share program feedback with the program manager.
- Serve as a role model for behaviors that you want to promote.

Program structure

Program duration and dates

Program components

Communication plan

Supporting activities

Program duration and dates

While the manager experience in Workplace Analytics is intended to be an ongoing part of how leaders work, you can also set up a program structure to ensure adoption, learning, and iteration. Depending on your team's needs and where they are in the behavior-change journey, this initial phase can be shorter or longer.

Best practices

- Plan launch to avoid periods with high levels of distractions (such as planning cycle or holiday season).
- Instead try to plan it during times of changes, encouraging new habits to form during times of fluctuation.
- Consider your team's rhythm of business. Avoid peak workload periods or around big or unusual projects.
- Lay out a program of work with major milestones including:
    - Launch communications and events.
    - Routine process check-ins to confirm all is working as planned.
    - Group sessions for participants' learning and feedback sharing.
    - Milestones for value check-ins that evaluate progress as compared to program objectives and reports these to the stakeholders or broader business.

Program components

Design your program to meet the needs of your team. Familiarize yourself with the resources available, either from Microsoft or an alternate source, and then select those that work best. For example, if your group communicates well through a collaboration app and you want to minimize their weekly time commitment, you might reduce or skip the weekly check-in meetings, and rely more on the app for program discussions.

Best practices

- Determine the right dates and frequency for each component.
- Consider what apps your team already uses to collaborate and minimize their time commitments by using them for more of the program discussions.
- Estimate a weekly time commitment for your team and include the estimate in program communications.
- Consider when you want the executive sponsor to be most visible and active during the program. Include these touch points in your schedule.

Communication plan

Successful change programs rely on consistent and transparent communication. Use these communications to address expectations, communicate the plans, and explain how the change will affect employees.

Best practices

- Focus on the impact of the change on the employee.
- Be clear about what you know now and do not know now.
- Let employees know when more information will be available.
- Be clear how employees can provide program feedback.
- Use known language and framing, including anchors to other known initiatives.

Program launch email

Have the executive sponsor send a launch email.

Keep it as short as possible. Rely on links to more detailed information when available.

Personalize the message to draw attention.

Frame the program as an opportunity for learning and experimentation.

Provide employees with program contact information and easy feedback channel.

Include Privacy information.

Use Microsoft's communication guidance.

Supporting activities and resources that drive change

Kickoff meeting

- Schedule a one-hour kickoff meeting as the first event in your program, following the program launch email.

Surveys

- In addition to the quantitative data that Workplace Analytics provides, you can use surveys to collect qualitative data before, during, and after your program. See Create surveys for survey recommendations.

Check-ins

- Check-in meetings let you and program participants discuss program learnings and the experience in general. See Check-ins for check-in meeting best practices.

Collaboration channel

- Adding a social component to your program will help spread new habits. Set up a collaboration channel, such as a Microsoft Teams channel, to support your program. See Establish a collaboration channel to get more best practices relating to collaboration channels.

Spread the change

1 | **Habit formation**

2 | **Best practices**

Habit formation

Rewards are critical to habit formation. We all have heard about how animals such as rats, dogs, and monkeys can learn new behaviors in labs when given rewards such as food. Human beings are no different from other animals when it comes to habit formation.

In his book *The Power of Habit*, Charles Duhigg describes the habit-formation process as a three-step loop. "First there is a cue, a trigger that tells your brain to go into automatic mode and which habit to use. Then there is a routine, which can be physical or mental or emotional. Finally, there is a reward, which helps your brain figure out if this particular loop is worth remembering for the future."

Rewards can come in many forms and can be delivered in many ways. Structures, processes, systems, target setting, and incentives all offer ways to reinforce and embed the changes that you want. The challenge is selecting the right reinforcement mechanism. The way a reward is delivered also matters – timing of rewards and perceptions of fairness also impact effectiveness ([The four building blocks of change](#) by McKinsey & Company).

Best practices to spread change

- Send ROI and analysis to sponsors and managers.
- Present progress, feedback, and next steps to the participants.
  - Ask questions like: What did you get out of the program? What would you do differently?
- Conduct post-mortem.
- Determine next steps, such as repeat the process with another team.
- Periodically and publicly recognize a member of your team for demonstrating healthy collaboration habits, and explicitly state the reason they were selected.
- Make a routine of sharing stories at team meetings about how healthier collaboration habits have enhanced performance and culture. For example, a reduction in after-hours work has enabled team members to attend more family events in the evening.
- Restructure a current highly visible system or process, such as a weekly team meeting or periodic business review, to reflect new team-collaboration norms.
- Require managers and executive sponsors to commit to consistently and visibly role-modeling new behaviors.
- Continue to offer learning opportunities. For example, send articles about healthy work habits and offer specific additional training about facilitating meetings and writing skills.

Go team!