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## **The Microsoft Office Fluent User Interface: Information Worker Perception Of Productivity, Training, And Support Requirements**

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

August 2007

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## Introduction

In November 2006, Microsoft made its new version of the Microsoft Office system, including the popular suite of applications that includes Excel, Word, Outlook, and PowerPoint, available to the public. This new 2007 Office release represents the most significant change to the company's Office productivity package since Microsoft Office 1997. Changes include the new Microsoft Office Fluent user interface, improved integration of desktop tools, and the introduction of a host of Microsoft SharePoint-based collaboration and enterprise content management server capabilities.

While the Fluent user interface (UI) promises significant benefits to the typical Office end user, the changes to the UI may raise questions among IT managers or end users evaluating or planning for Office migrations. Questions may include:

- What are the overall benefits end users can expect from the new user interface?
- What is the overall ease of use and level of satisfaction experienced by end users?
- Will there be an effect on the productivity of end users? If yes, how significant and long-lasting will the impact be?
- What are the most popular methods of training? What will be the effect on help desk support requirements?

Microsoft commissioned this study to provide answers to these questions. This study is designed to help organizations and individuals understand the benefits of the Fluent user interface and address some of the challenges they may have in transitioning to Office 2007.

The primary findings of the study include:

1. End users react very positively to the benefits of the Fluent user interface.
2. The average end user experiences a short-term reduction in productivity, but becomes more productive within a few weeks.
3. The majority of users do not see significant changes in their help desk requirements compared with their experience on previous versions of Office.
4. A majority of respondents are not using training during their transition, though some do indicate that training would be beneficial.

## Study Methodology

To conduct this study, Forrester Consulting administered an online survey of 1004 users of Office 2007 programs. The survey questions focused on the respondent's use of Microsoft Office programs, their level of satisfaction with the Fluent user interface, the level of impact on their productivity, and their training/support requirements.

- All respondents used the Office 2007 Release (not pre-release versions).
- The survey focused on the experience of end users in business roles outside of information technology. Individuals that identified themselves as having a professional information technology role, or the equivalent of an information technology role, were screened out of survey participation.
- Respondents had to use at least one of the following programs to qualify for the survey: Microsoft Word, Excel, Access, PowerPoint, or Outlook.
- A cross-section of industries, age groups, and professional titles was represented.
- Respondents were all from North America.
- For clarity purposes, Forrester Consulting referred to the Fluent user interface as the "Office 2007 user interface" in the survey.

Throughout these study results, Forrester Consulting distinguishes between "advanced" and "general" user groups. For this study, we defined advanced users as those who use a major Office 2007 program (Word, Excel, PowerPoint, Access) on a daily basis, and also use its more advanced features. The general user group consisted of all non-advanced users.

Additional information about the study methodology, interview respondents, and user groups can be found in the Appendix.

## Study Findings

Overall, end users express positive sentiments about the benefits of the Fluent user interface. They cite the access to new features and functions, the improved look and feel, and the ability to create high-quality documents as the primary benefits. Almost half of all respondents said that they are more satisfied with the new user interface compared with previous versions of Microsoft Office; the majority of users indicate that the interface is about the same, or easier, to use than previous versions.

The study indicates that users may face an initial decline in productivity during their transition to the Fluent user interface. This is a result of the changes and improvements to the overall user experience, which will require users to spend some time locating their favorite features and commands and experimenting with new ones. The impact of this productivity decline is likely to be limited in scale and duration for most end users. On average, end users experience a two- to three-week period in which they are “slightly less productive” compared to previous versions of Office. The majority of respondents indicate that they are eventually able to become more productive on the new version compared with previous versions.

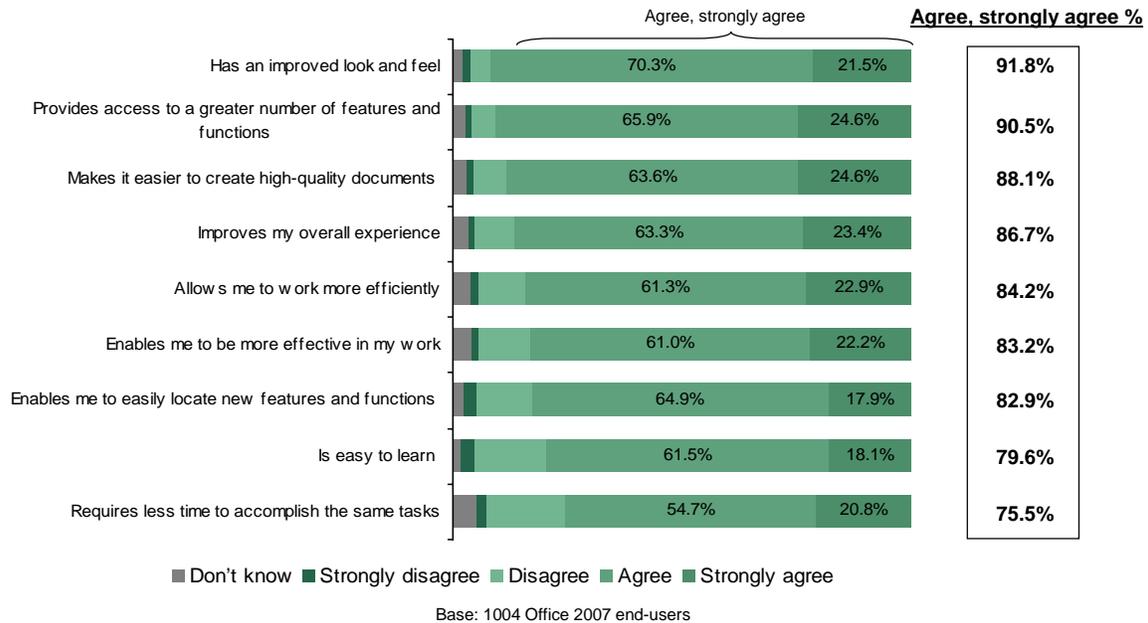
The majority of respondents are not using any training in their transition. Those who are using training rely primarily on online, interactive training; a smaller percentage of respondents use classroom-based training. A large percentage of respondents indicate that some training is necessary to get up to speed on the UI, and online training is the preferred method. However, more than a third of respondents believe that training isn’t necessary.

### **1. End users react very positively to the benefits of the Fluent user interface.**

Forrester Consulting asked respondents to indicate the level to which they agreed with a series of statements about the Fluent user interface (see Figure 1). Respondents were very positive about the benefits they have received. Respondents agreed most strongly with statements related to improved access to features, to the improved look and feel of the new interface, the new features and functions, and the ease with which they are able to create high-quality documents. More than 88% of respondents said that they “agree” or “strongly agree” with statements related to these benefits.

**Figure 1: Benefits Of The Fluent User Interface**

“Please indicate the degree to which you agree or disagree with the following statements about the new user interface.”



Source: A commissioned study conducted by Forrester Consulting on behalf of Microsoft.

The reaction to these statements varied slightly within user segments.

- Advanced users were more likely to “strongly agree” than to simply “agree” with the statements. This indicates that advanced users are more enthusiastic about the changes that have been made, in terms of overall features and impact on daily work activities. It is also likely that these advanced users are more reliant on Microsoft Office for their daily work, compared with general users, and therefore recognize the more immediate benefits from the changes to the interface.

It is worth noting that Forrester Consulting found little difference between the advanced and general user groups in terms of the percentage of respondents who *disagreed* with the statements. The primary difference in these user groups was between the percentage of “agree” or “strongly agree” responses.

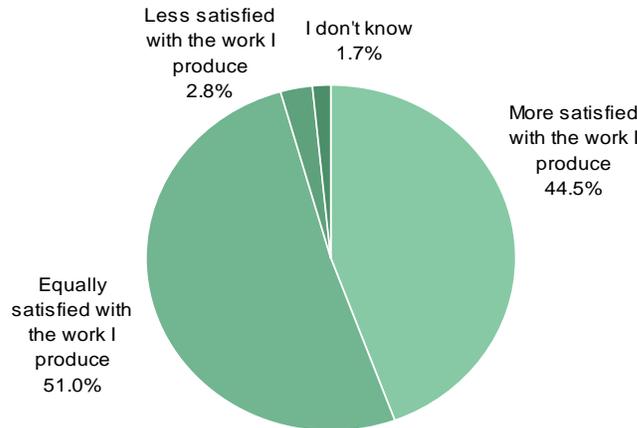
- At the same time, younger users were, in general, more positive about the new user interface. They were more likely to “strongly agree” with statements about the benefits of the UI than older respondents, but the differences were not as high as the differences between advanced and general users.

Forrester Consulting asked all respondents whether they are more satisfied, equally satisfied, or less satisfied with the work they produce using the new user interface, when compared with their previous versions of Office; 44.5% said that they are more satisfied, and only 2.8% said that they are less satisfied (see Figure 2).

- Again, we found more enthusiasm for the UI among advanced users, who were slightly more inclined to be “more satisfied” (51.8% for advanced respondents versus 38.0% for general respondents) with the user interface.

**Figure 2: Level Of Satisfaction Compared With Previous Versions Of Office**

*“When I compare my previous version of Office with the new version, I am . . .”*



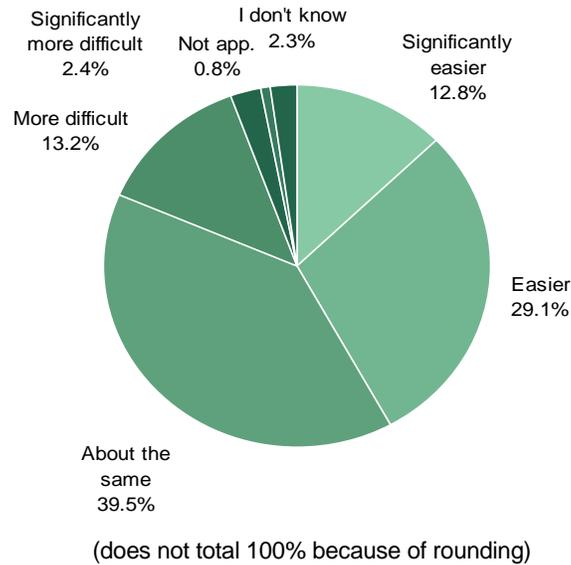
Base: 1004 Office 2007 end users

Source: A commissioned study conducted by Forrester Consulting on behalf of Microsoft.

Since considerable changes have been made to the Office 2007 user experience, Forrester Consulting expected some users to express less positive statements about its ease of use. For example, in Figure 1 “is easy to learn” and “requires less time to accomplish the same tasks” are lower in the ranking of benefits (though the statements still have greater than 75% agreement). In separate questions, however, Forrester Consulting found that respondents are still generally positive about the Fluent user interface’s ease of use. In comparison to their experience with previous versions of Office, 41.9% of respondents indicate that the new user interface is “significantly easier” or “easier” to use (see Figure 3). Only 13.2% said that the new user interface is “more difficult” to use, 2.4% said that it is “significantly more difficult.”

**Figure 3: User Interface Ease Of Use**

*“Which of the following best describes your experience with the new user interface compared with previous versions of Office?”*



Source: A commissioned study conducted by Forrester Consulting on behalf of Microsoft.

Advanced users were generally more positive about the ease of use, with 17.1% saying that the Fluent UI is “significantly easier” than previous versions, compared with 8.9% of general users.

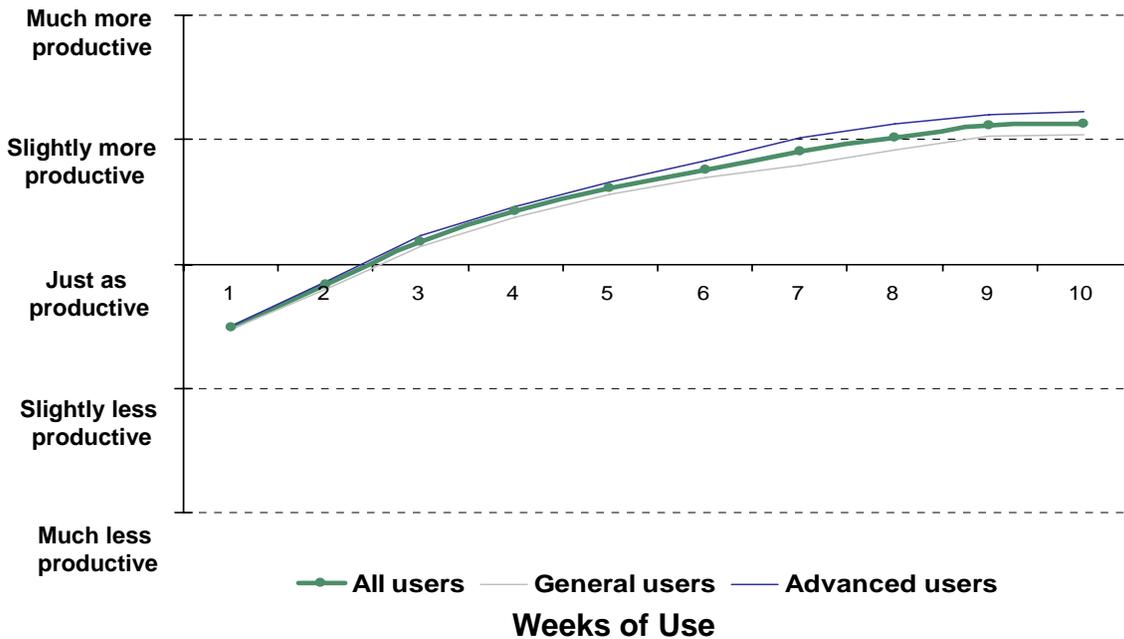
## **2. The average end user experiences a short-term reduction in productivity, but becomes more productive within a few weeks.**

Many users reported a short period of reduced productivity during the transition to the Fluent user interface. This is because changes have been made to the way end users access features within the Office programs. For example, the toolbars and menus found in previous versions of Microsoft Office have been consolidated into a new banner at the top of client applications called “the Ribbon.” Additionally, Microsoft has made several changes to the core functions applicable to more advanced users, such as Excel pivot tables and PowerPoint charting. These changes expose users to functions and commands that, while available, may have been less accessible in previous versions of Microsoft Office. This could result in a preliminary period of lost productivity as users experiment with the user interface and locate their favorite features and commands.

To understand the impact that the transition has on end user productivity, Forrester Consulting asked each respondent to score his level of productivity during the first 10 weeks of use on a five-point scale, ranging from “much less productive” to “much more productive” (see Figure 4). The results show that on average, users experience a short-term negative impact on productivity, followed by improved productivity. By week 8, the average respondent indicated that he was “slightly more productive” compared with the user experience on previous versions of Office.

**Figure 4: Weeks To Productivity Among Office 2007 Users**

*“Please use the scale below to indicate your productivity using the new version compared with your previous version of Office. Select one response for every week you have used the new version.”*



\*Base: 1004 Office 2007 end-users; Number of respondents varies by weeks of use. Chart represents a weighted average of valid responses.

Source: A commissioned study conducted by Forrester Consulting on behalf of Microsoft.

To quantify the average short-term loss in productivity, Forrester Consulting asked respondents how long, in the first two to three days as an Office 2007 user, it took them to perform work that would normally take 30 minutes to complete. The average response to this question was 33.8 minutes, a 12.7% increase over the 30-minute activity.

To understand productivity improvements over time, we asked respondents how long it would take them to accomplish a similar 30-minute task *today*. The average response was 24.7 minutes, a 17.4% *reduction* in time required to complete the 30-minute task.<sup>1</sup> While these productivity measures were likely only estimates for most respondents — and do not represent a comprehensive productivity study — they are reflective of an overall trend in the data: a short term productivity reduction, followed by some recognizable productivity improvements as users become accustomed to changes in the interface.

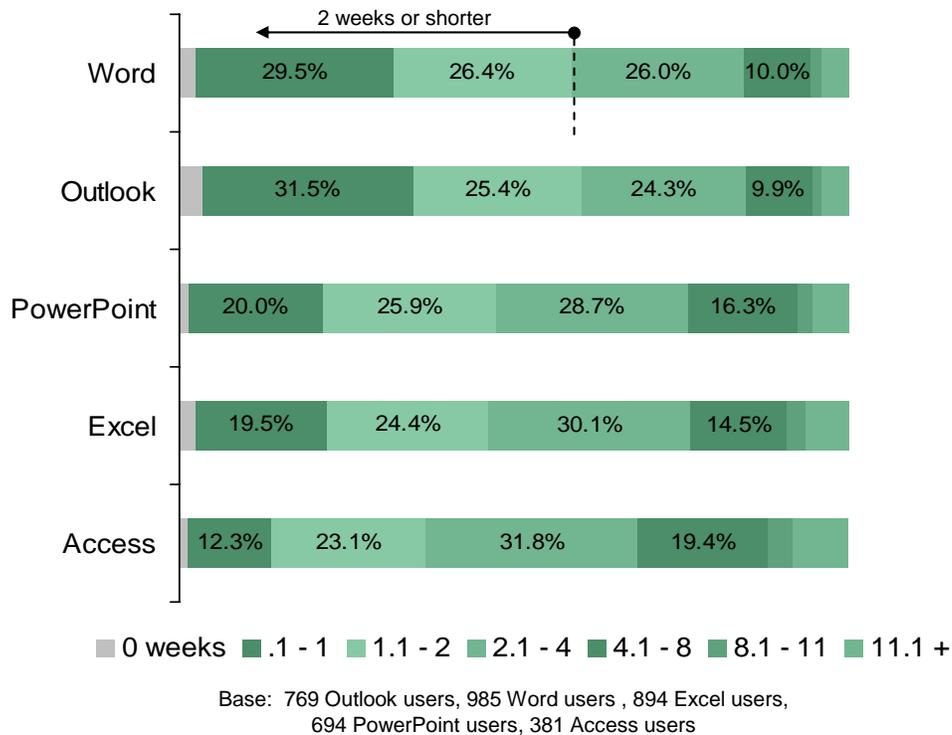
Forrester Consulting also found that the time required to return to full productivity may vary slightly, depending on the specific Office program being used. We asked regular users of the most popular Office programs — Word, Outlook, PowerPoint, Excel and Access — to estimate the time (in weeks) required to return to full productivity on each program (see Figure 5). Of Word users, 58.5%

<sup>1</sup> Five responses of more than 200 minutes, to either question, were removed from this analysis.

expected to return to full productivity within the first two weeks, compared with 46.5% of Excel users, and 36.7% of Access users.

**Figure 5: Productivity Versus Previous Versions Of Office**

*“For the following programs, approximately how many weeks did it take you to become as productive as you were on previous versions of Microsoft Office?”*

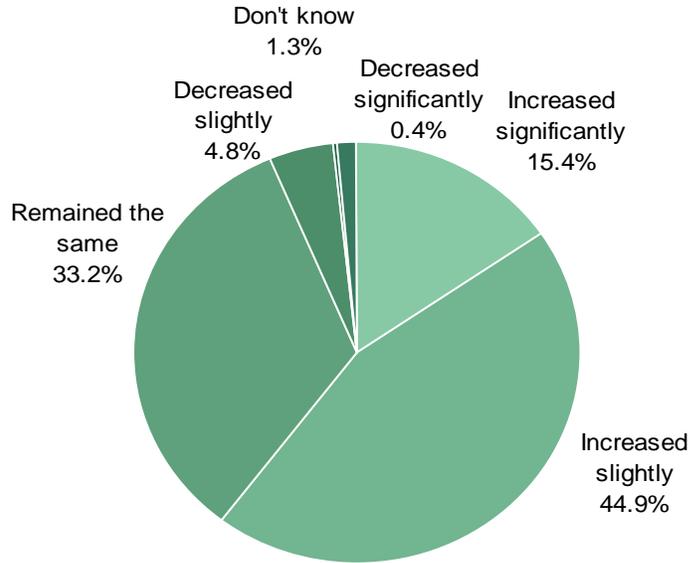


Source: A commissioned study conducted by Forrester Consulting on behalf of Microsoft.

Finally, we asked respondents to compare their productivity today with their productivity on previous versions of Microsoft Office (see Figure 6). Consistent with our other productivity findings, 60.4% said that their productivity “increased slightly” or “increased significantly,” 33.2% said their productivity “remained the same.” Only 4.8% said that their productivity “decreased slightly” and 0.4% said their productivity “decreased significantly.”

**Figure 6: Productivity Versus Previous Versions Of Office**

*“How would you compare your productivity on your previous version of Microsoft Office to your productivity today?”*



Base: 1004 Office 2007 end-users

Source: A commissioned study conducted by Forrester Consulting on behalf of Microsoft.

- Advanced users were more likely to say that their productivity “increased significantly” than general users.

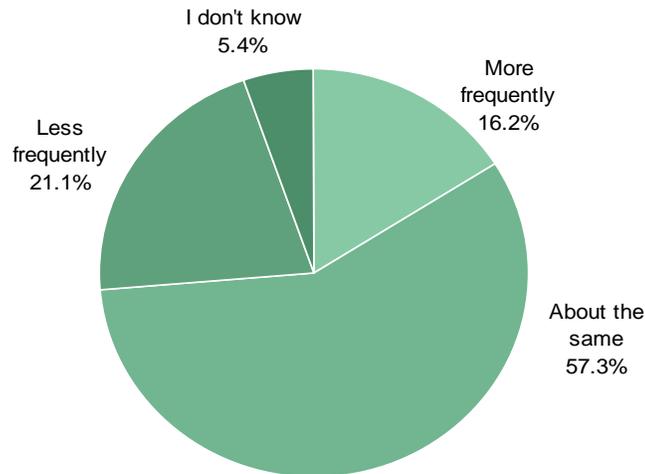
	General users	Advanced users	Total
Increased significantly	10.4%	21.1%	15.4%
Increased slightly	44.1%	45.9%	44.9%
Remained the same	39.4%	26.2%	33.2%
Decreased slightly	4.3%	5.3%	4.8%
Decreased significantly	.4%	.4%	.4%
Don't know	1.5%	1.1%	1.3%

**3. The majority of users do not see significant changes in their help desk requirements compared with their experience on previous versions of Office.**

To understand what effect the UI interface has had on IT help desks, we asked respondents whether they were seeking assistance more frequently, less frequently, or as frequently as with their previous versions of Office (see Figure 7). Of the respondents, 57.3% indicated that they sought assistance about the same as with previous versions. The percentage who sought assistance more frequently was slightly less than the percentage that sought assistance less frequently, 16.2% and 21.1%, respectively. Between advanced and general users this percentage did not vary significantly.

**Figure 7: Help Desk Requirements, Compared With Previous Versions Of Office**

*“Have you needed to seek assistance in figuring out how to get things done on the new version more frequently, less frequently, or about the same as the previous version?”*



Base: 1004 Office 2007 end-users

Source: A commissioned study conducted by Forrester Consulting on behalf of Microsoft.

While these results indicate that users are, for the most part, neutral about their assistance requirements, Forrester Consulting believes that this is a generally positive sign for end users considering an Office 2007 adoption – since only 16.2% indicate an increase in assistance requirements compared with previous versions.

We also asked respondents how many times they called the help desk while learning the Fluent user interface — 61.1% said that they did not call the help desk at all. The most common reasons for calling the help desk were “figuring out a new program feature” (65.0% of respondents) and “finding a specific feature” (46.5% of respondents). The nature of these responses is reflective of the changes in location of popular features and functions, and the access to new features and functionality that the UI provides.

#### **4. A majority of respondents are not using training during their transition, though some do indicate that training would be beneficial.**

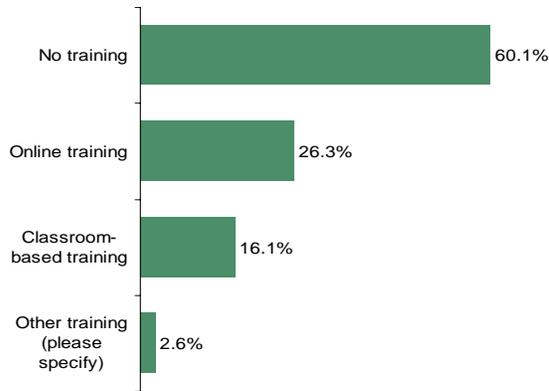
To gain a better understanding of the most popular methods of training, Forrester Consulting asked respondents what type of training they used as they started using the Fluent UI (see Figure 8). The majority of the respondents (60.1%) indicated that they did not use any training at all. Of the respondents who did use training, online training was the preferred method.

As a follow-up to the first training question, Forrester Consulting asked respondents what training they believed was *necessary* to get up to speed on the new user interface. While 26.3% indicated that they used online training, a larger percentage, 46.9%, indicated that online training was necessary. While 16.1% said that they used classroom-based training, a slightly larger number, 23.7%, said that classroom-based training was necessary. The results indicate that despite

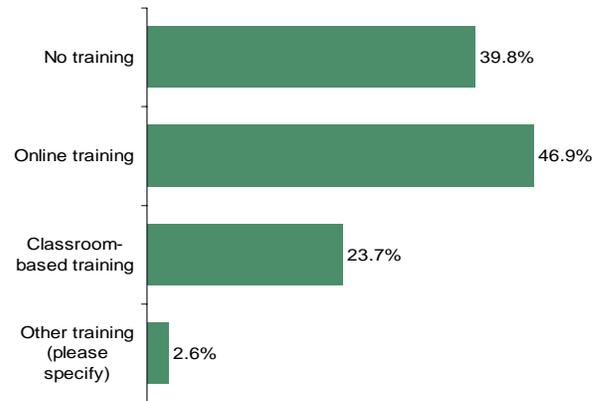
common practice, respondents believe that some training programs — particularly online training — would be beneficial for a typical end user.

**Figure 8: Training Among End Users**

*“Which of the following types of training did you use as you started using the new user interface?”*



*“Which of the following types of training do you think are necessary to get up to speed on the new user interface?”*



Base = 1004 (multiple responses accepted)

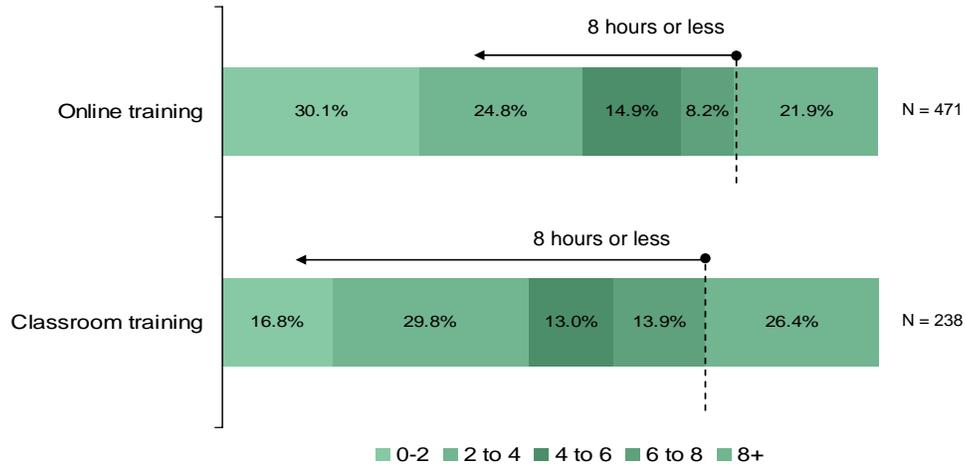
Source: A commissioned study conducted by Forrester Consulting on behalf of Microsoft.

Younger respondents were more likely to say that they used “no training,” and less likely to say that they thought training was necessary. Of the younger respondents, 46.3% said that training isn’t necessary, versus 29.9% of older respondents.

We asked respondents saying that online training or classroom-based training was necessary how many hours of training they thought was required (see Figure 9). The majority indicated that 8 hours or less of training would be sufficient.

**Figure 9: Training Among End Users**

*“How many hours of the following types of training do you think are necessary to become proficient with the new version of Microsoft Office?”*



(percentages do not total 100 because of rounding)

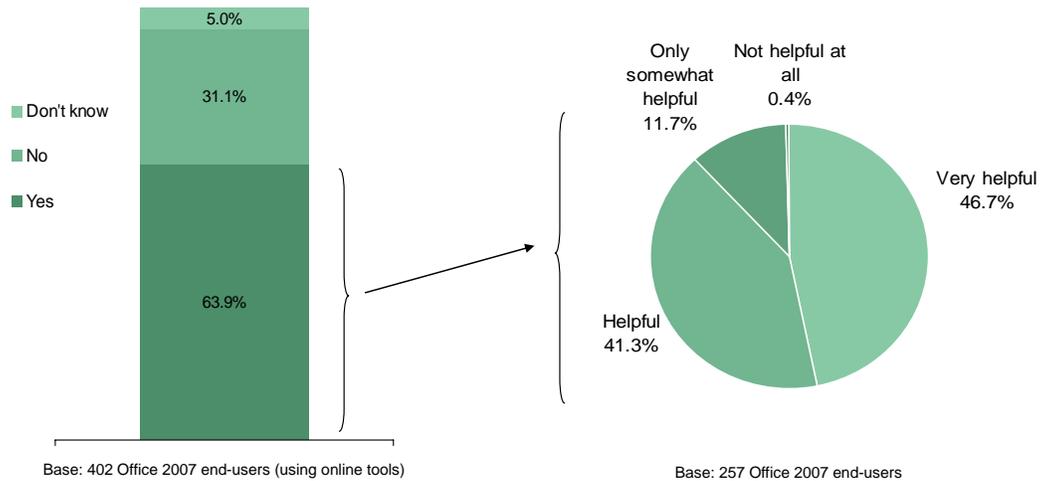
Source: A commissioned study conducted by Forrester Consulting on behalf of Microsoft.

Microsoft’s online training tools are a popular method of online training (see Figure 10). Of the respondents using online training, 63.9% indicated that they are using Microsoft tools. Microsoft’s Office Online “Up to Speed Training,” online training courses, and interactive command references were all used by between 43.6% and 54.5% of the respondent base. Of those respondents using Microsoft’s tools, 88.0% said they were “helpful” or “very helpful.” Only 12.1% responded that they were “only somewhat helpful” or “not helpful at all.”

**Figure 10: Training Among End Users**

*“Did you use any of Microsoft’s online training tools in your transition to the new user interface?”*

*“How helpful have Microsoft’s training tools been in addressing the user-interface-related questions among end users?”*



(totals may not total 100% because of rounding)

Source: A commissioned study conducted by Forrester Consulting on behalf of Microsoft.

- Advanced users were more likely to rely on Microsoft’s training tools than general users were. While 57.5% of general users said that they used Microsoft’s online training tools, this percentage rose to 71.3% for advanced users.

Finally, more structured training programs (whether classroom or online) are not the only options available to end users with Office 2007. When we asked about the other forms of help respondents received while getting up to speed on the Fluent UI, 59.5% of respondents indicated that they relied on coworkers to help them as they navigated the new interface, and 8.2% said that they relied on newsgroups. From our open-ended responses, other popular forms of training include tutorial books, training manuals, blogs, and friends.

## Implications For End Users

The data gathered in this study indicates that the Fluent user interface represents an improvement for a large percentage of end users. Individuals considering an Office 2007 adoption and IT decision-makers overseeing Office 2007 deployments can learn from the experiences of those surveyed to minimize the level of disruption their organization may face.

- **Anticipate overall benefits.** A large percentage of users say that the user interface is easy to use and that they are more satisfied with the work they produce using the new applications. A majority of users indicate that they are more productive with the new version compared with their previous versions of Office. Keeping these benefits in mind will help IT managers and users prepare for any challenges associated with the transition.
- **Expect some preliminary challenges.** Microsoft has introduced some significant changes with the Fluent user interface, all designed to improve the overall user experience. Users will notice changes to the look and feel of the Office applications and to the location of some of their favorite features. Due to these changes, users can expect a moderate decline in productivity as they familiarize themselves with the new user interface. However, this study shows that these challenges should be short term compared with previous versions. After two to three weeks, the average user achieves a slightly improved level of productivity.
- **Invest some time in training.** Forrester Consulting believes that some preliminary training, whether online or classroom-based, will help users navigate the user interface. Some training programs will help users understand the more fundamental changes to the programs they use most often, and allow them to become more productive in a shorter amount of time.

Careful planning is the key to success in any transition. The Fluent user interface has been designed to improve the overall experience of end users, and respondents in this study were very positive about the benefits they have received from the improved user experience. Still, the changes that have been made to the user experience may present some preliminary challenges for end users. Individuals who anticipate some short-term challenges, and mitigate any negative impact by leveraging a moderate amount of training, can keep any productivity loss to a minimum. For these individuals, the user-interface-related challenges associated with deployments of Office 2007 should be minor compared with the benefits.

## Appendix: Methodology Details

### Methodology Overview

- The survey was conducted online through an online survey panel generated by Forrester Consulting. No sample lists were provided by Microsoft.
- Forrester Consulting and Microsoft prepared study questions. Both Microsoft and Forrester Consulting made efforts to keep survey questions objective. To provide objectivity, Forrester maintained editorial control of the survey questions.
- Forrester Consulting maintained editorial control over the presentation of results.

### Demographics And Other Respondent Detail

- Respondents ranged background:
  - Ratio of males to females was 47.2%/52.8%.
  - Ages 18 to 65+ were represented.
- A variety of educational backgrounds were represented:
  - 36.8% have high school, some college, or an associates degree.
  - 36.3% have a bachelor's degree or some graduate work.
  - 24.0% have masters degree or other professional degree.
  - 2.9% have a doctorate (PH.D, EdD).
- A cross-section of job functions and industries was represented.
- Respondents were asked what operating system they used:
  - 4.5%: Windows 2000.
  - 69.0%: Windows XP.
  - 14.6%: Vista.
  - 11.8%: Don't know/can't answer.

### Advanced Versus General Users

To differentiate between advanced and general users, Forrester Consulting asked two questions: one related to frequency of use, one related to use of advanced features.

- Forrester Consulting considered an “advanced” user to be any respondent who said that she used an Office application on a daily basis and used the more advanced features and functions in that program.
- The split of general to advanced users was 48% to 52%.
- Examples of advanced features and functions were provided to respondents and included table editing commands within Word, pivot tables within Excel, and custom animations within PowerPoint.

The following questions were used. The bolded responses were, in combination, what defined as user as “advanced”:

*Q: How would you describe your frequency of use of the following Microsoft Office programs?*

- a. Have never used.
- b. Used in the past, but don't use now.
- c. Only use several times per year.
- d. Use monthly.
- e. Use weekly.
- f. Use several times per week.
- g. Use daily.**

*Q: How would you describe your frequency of use of the following Microsoft Office programs?*

- a. I use very few of the features and functions within this program.
- b. I use several of the features and functions within this program, but few of the more advanced ones.
- c. I use many of the features and functions within this program, including the more advanced ones.**