



Taking Insights To Action Playbook

Use cases for Workplace Analytics

April 2021



Taking Insights To Action Playbook goals and audience

Playbook goal



- This playbook introduces analysts and change practitioners to ways of uniquely measuring and driving organizational change with Workplace Analytics. The playbook provides a robust understanding of how to use Workplace Analytics and serves as a demonstration of the art of the possible, including:
 - *A Taking Insights To Action framework* and supporting evidence from academic research
 - *Sample analyses* by framework topic and why they matter
 - Taking Insights To Action project guidelines
- This playbook is NOT a tutorial on Workplace Analytics or a how-to analysis guide. For tutorials on Workplace Analytics, see [Discover Microsoft Workplace Analytics](#). To learn about Viva Insights, see [Drive organizational change with Microsoft Workplace Analytics and MyAnalytics](#).

Target audience



The target audience for this playbook include *analysts* who are analyzing and tracking the state of change initiatives and change management practitioners who are seeking measures for driving more efficient organizational collaboration.

Note: *References to product features in this document are subject to change and are accurately reflected at the time of this document's creation.*

Table of contents

Introduction

- Taking insights to action overview
 - Workplace Analytics case study for behavioral change
-

Framework

- A model for driving behavior change with insights
-

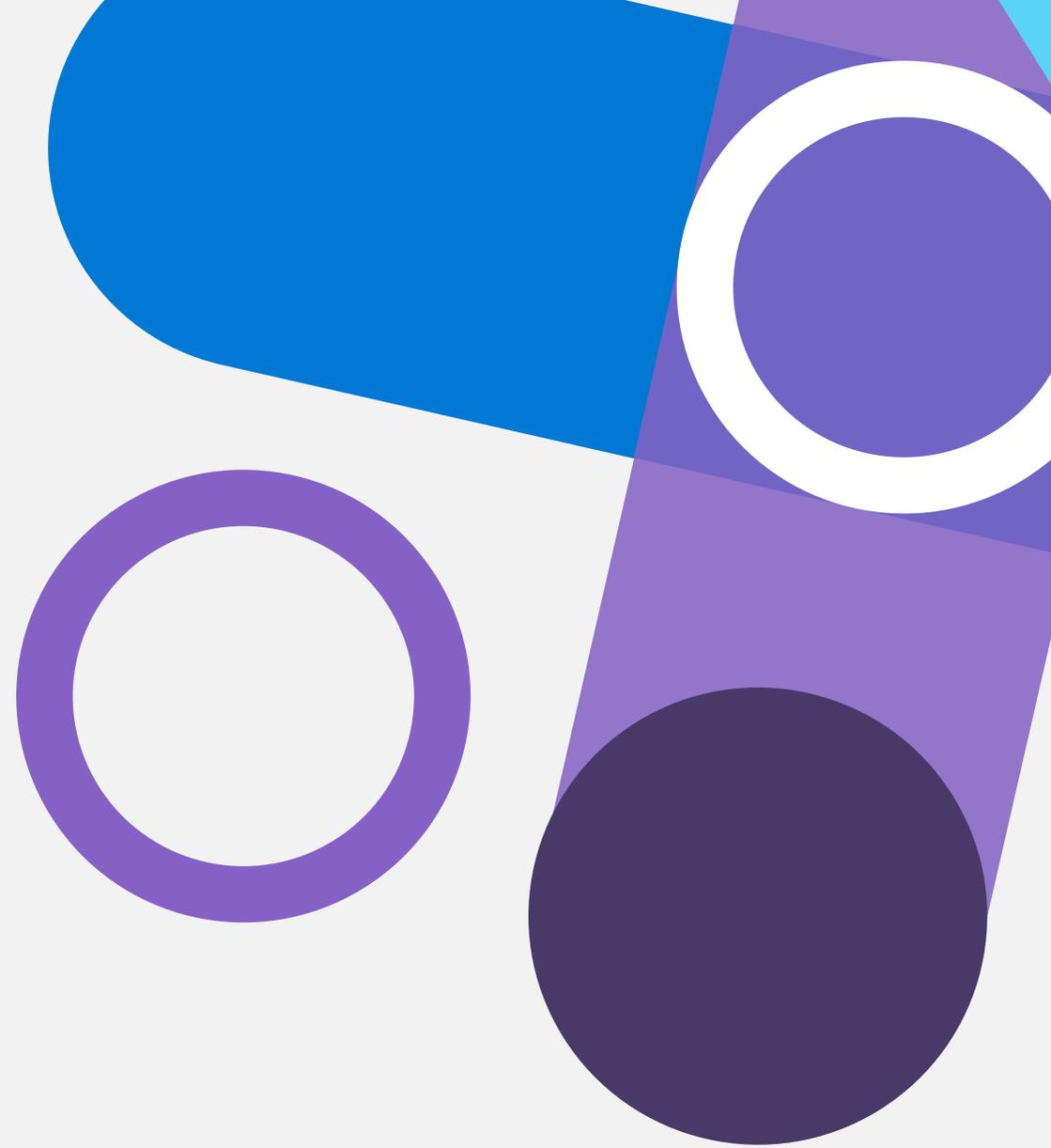
Project guidelines

- Project approach and getting started with a project
-

Appendix

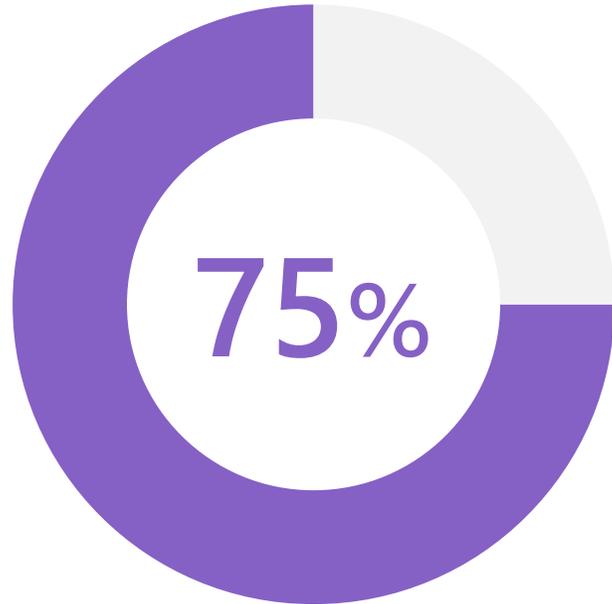
- Deep dive examples
- Example co-creation sessions
 - Co-creating change tactics with managers
 - Manager-Team discussion guide
 - Co-creating change tactics with employees and champions

Introduction

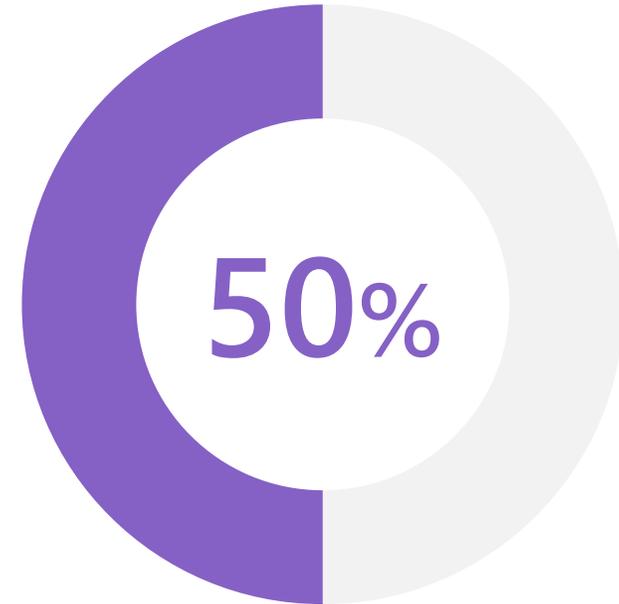


Transformation is frequent but failing

75% of organizations
are transforming to keep pace with a
rapidly evolving world



50% of transformations
are failing to deliver impactful results
because people's behavior doesn't change



Why might your change initiative fail

1



There is a lack of prioritization or a well-defined outcome

2



The change is too large resulting in too much opposition

3



There is a lack of understanding for why the change is failing

4



You have not considered the mindset of those who are impacted by the change

5



There is an ineffective means to measure and reinforce change

6



Employees are not empowered to drive their own change

7



There is no way to learn what works and what doesn't

What can you do to ensure that your change initiative is successful

What can you do

1 Prioritize opportunities

Before worrying about how to change executive teams need to figure out what to change- in particular, what to change first¹

2 Prioritize groups for change

Most successful transformations begin with small groups that are loosely connected but united by a shared purpose²

3 Integrate with qualitative insights

An iterative process starts with what the data can reveal, and proceeds to the next step of diagnosing the "why," which the data cannot typically reveal³

4 Design custom change tactics

A surefire way to shoot yourself in the foot when you're leading a large-scale change effort is to ignore what's on the mind of employees⁴

5 Set a metric indicator

The missing links are the platforms which put the right data, the right leading indicators, in the hands of decision makers in real time⁵

6 Create measurement dashboards

Smart companies today ensure that many of their employees can speak the language of data and use it to improve work outcomes. By empowering employees with these fundamental skills, companies are realizing tremendous levels of innovation and efficiency⁶

7 Experiment and iterate

Introduce the change in some places in the organization ("the treatment group") but not in the others ("the control group")⁷

Supporting research

1. [What everyone gets wrong about change management, Harvard Business Review \(HBR\) 2017](#)
2. [Workplace Analytics Four tips for managing organizational change](#)
3. [EAST: Four Simple Ways to Apply Behavioural Insights, The Behavioural Insights Team, 2014](#)

4. [Getting personal about change, McKinsey & Company 2019](#)
5. [Workplace Analytics Lagging Indicators & Measuring Success](#)
6. [The Democratization of Data Science, HBR 2014](#)
7. [Experiment with Organizational Change Before Going All In, HBR 2014](#)

Integrate analytics and action to drive strategic outcomes



“

Though both OD and analytics are essential for strategic HR, they are treated as two entirely different disciplines, with virtually no overlap in the expertise needed for success.

The solution requires building greater capability for doing organizational diagnosis and action among analytics professionals and building greater analysis capability among OD professionals and HRBPs.



Alec Levenson
Professor USC Center for
Effective Organizations

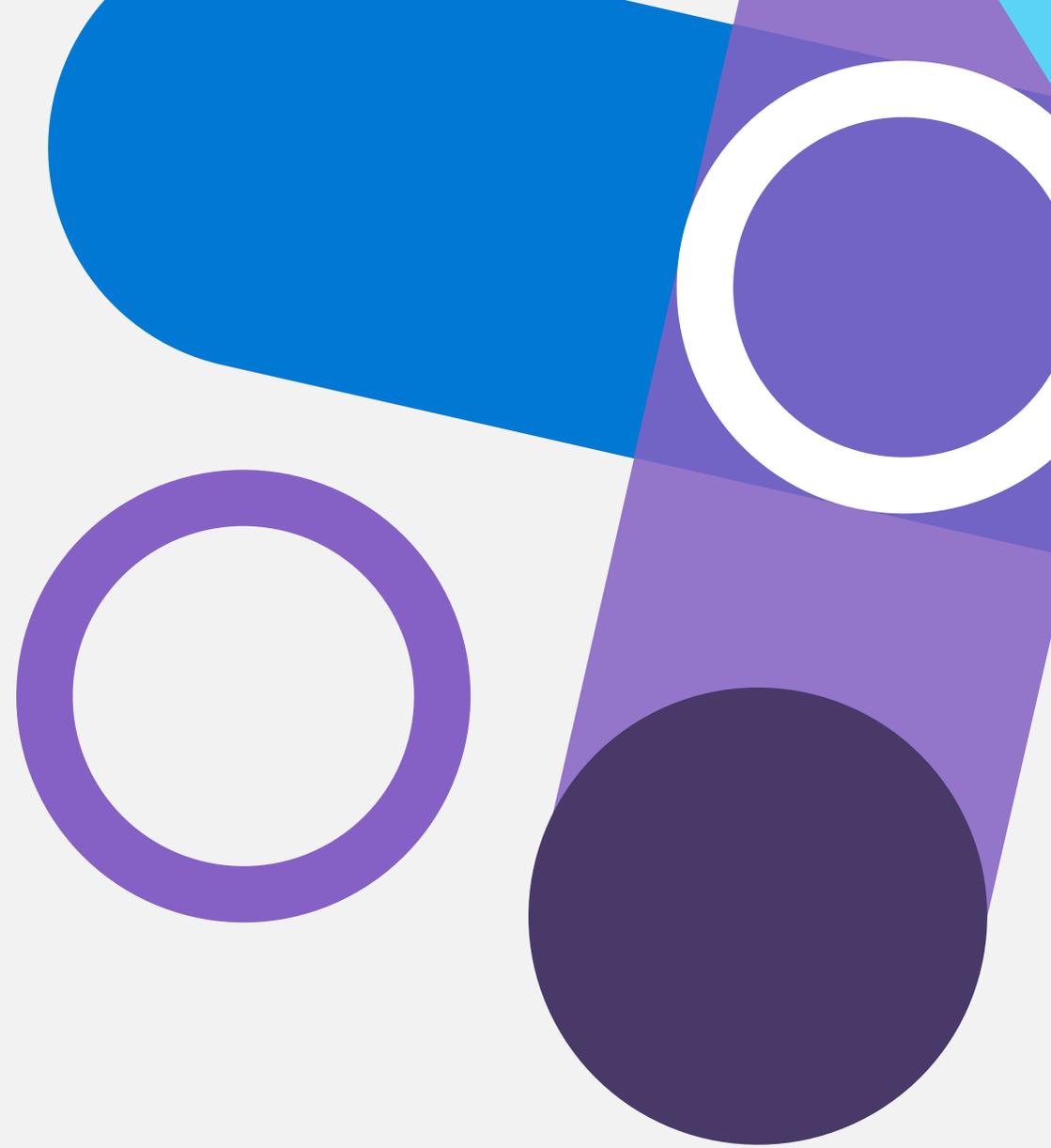
Types of changes with Viva Insights

A sample of scenarios and metrics for which Viva Insights can help drive and measure behavior change

	Focus areas	Key metrics
Transform meeting culture 	<ul style="list-style-type: none"> Optimize meeting hours Examine recurring meetings Promote healthy meeting habits 	<ul style="list-style-type: none"> Meeting hours Multitasking meeting hours
Develop effective managers 	<ul style="list-style-type: none"> Optimize meeting hours Prevent burnout Strengthen management pipeline Promote coaching and development 	<ul style="list-style-type: none"> Meeting hours After hours collaboration Influence score Time in one-on-one meetings with manager
Boost employee engagement 	<ul style="list-style-type: none"> Promote coaching and development Prevent employee burnout Drive employee empowerment 	<ul style="list-style-type: none"> Time in one-on-one meetings with manager After hours collaboration Time in meetings with manager present
Increase customer focus 	<ul style="list-style-type: none"> Optimize time with customers Promote coaching and development 	<ul style="list-style-type: none"> External collaboration hours Time in one-on-one meetings with manager
Foster innovation 	<ul style="list-style-type: none"> Enable deep work Utilize influencers 	<ul style="list-style-type: none"> Focus hours Influence score
Enhance operational effectiveness 	<ul style="list-style-type: none"> Free up capacity Improve meeting quality Keep employees engaged Protect time to get work done 	<ul style="list-style-type: none"> Collaboration hours Meeting hours Multitasking meeting hours Focus time
Enhance organizational resiliency 	<ul style="list-style-type: none"> Protect employee wellbeing Practice empathy Free up capacity Accelerate decision making 	<ul style="list-style-type: none"> After hours collaboration Time in one-on-one meetings with manager Collaboration Hours Conflicting meeting hours
Improve agility 	<ul style="list-style-type: none"> Organize better meetings Accelerate decision making Improve management practices 	<ul style="list-style-type: none"> Meeting hours Influence score Conflicting meeting hours

See [Workplace Analytics metrics](#) for details.

Workplace Analytics case study



Ways of working through change program to foster innovation

Core business challenge

- Attracting and retaining top talent in a **tight labor market** with shifting employee expectations
- **Inefficient ways of working** reducing innovation and employee engagement

Workplace Analytics solution

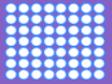
- Workplace Analytics metrics **correlated to engagement data** identified key areas for improvement including meeting sprawl and manager access
- **MyAnalytics** dashboards selected as primary tool for employees to **track and improve working norms**

Action and impact

- Company **implemented change program** built around Workplace Analytics insights and MyAnalytics
- **Ways of working improved** where meeting hours decreased, focus hours increased, and after-hours work was better managed
- **Significant improvement in perception** of company as innovative and flexible

Reduced meeting hour attendance by up to **4 hours per week**

Meeting sprawl reduction



Calendar focus blocks up to **4 hours more per week**

More focus time



Even with increased demand, **maintained or decreased** after-hours work

After-hours workload reduction



Reduced organizational load by **up to 50%**

Collaboration norm improvements



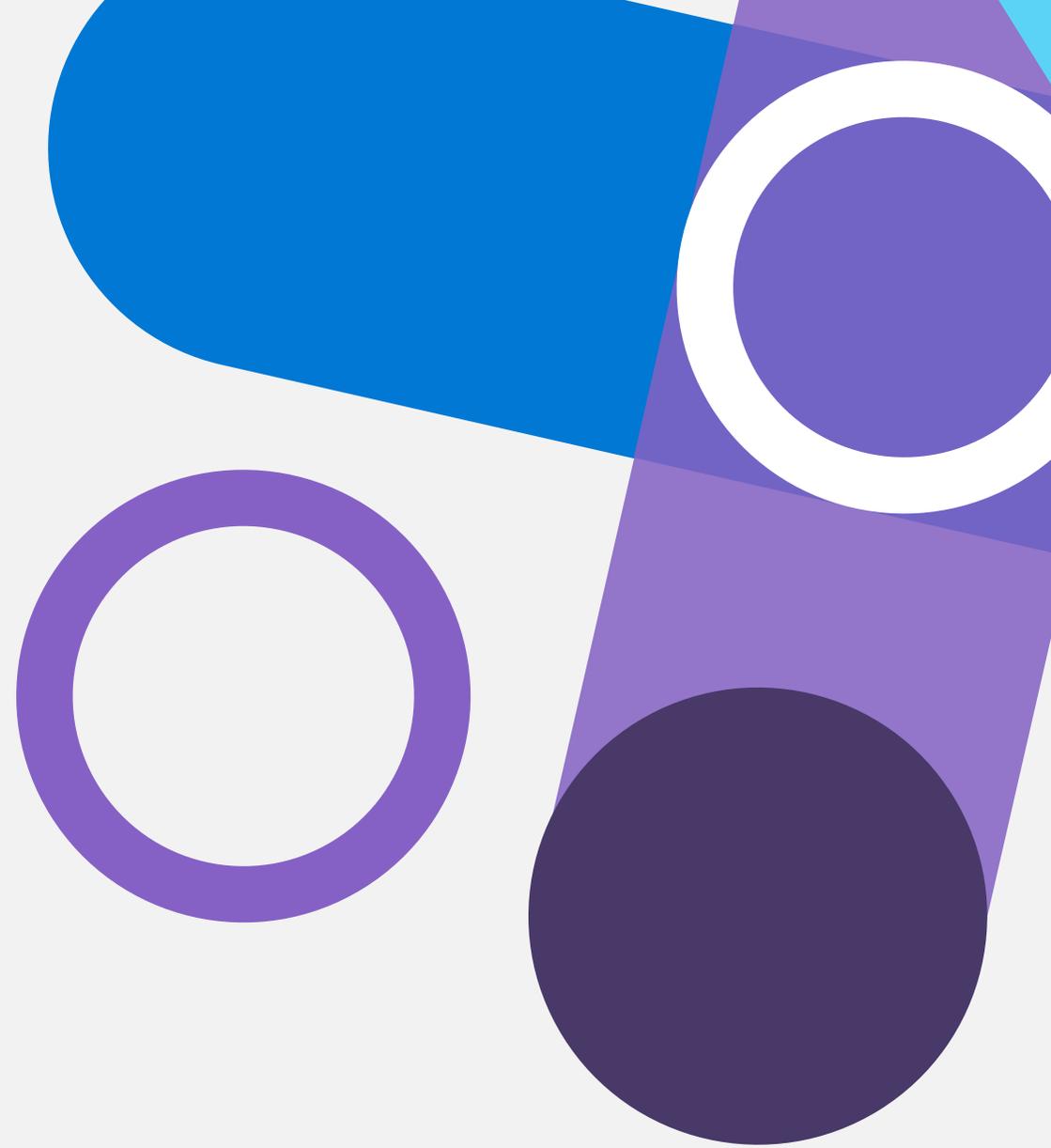
Key insights

Workplace Analytics uncovered the behavioral drivers of engagement and MyAnalytics powered an effective “ways of working” change program

“MyAnalytics shifted the way we get our work done”

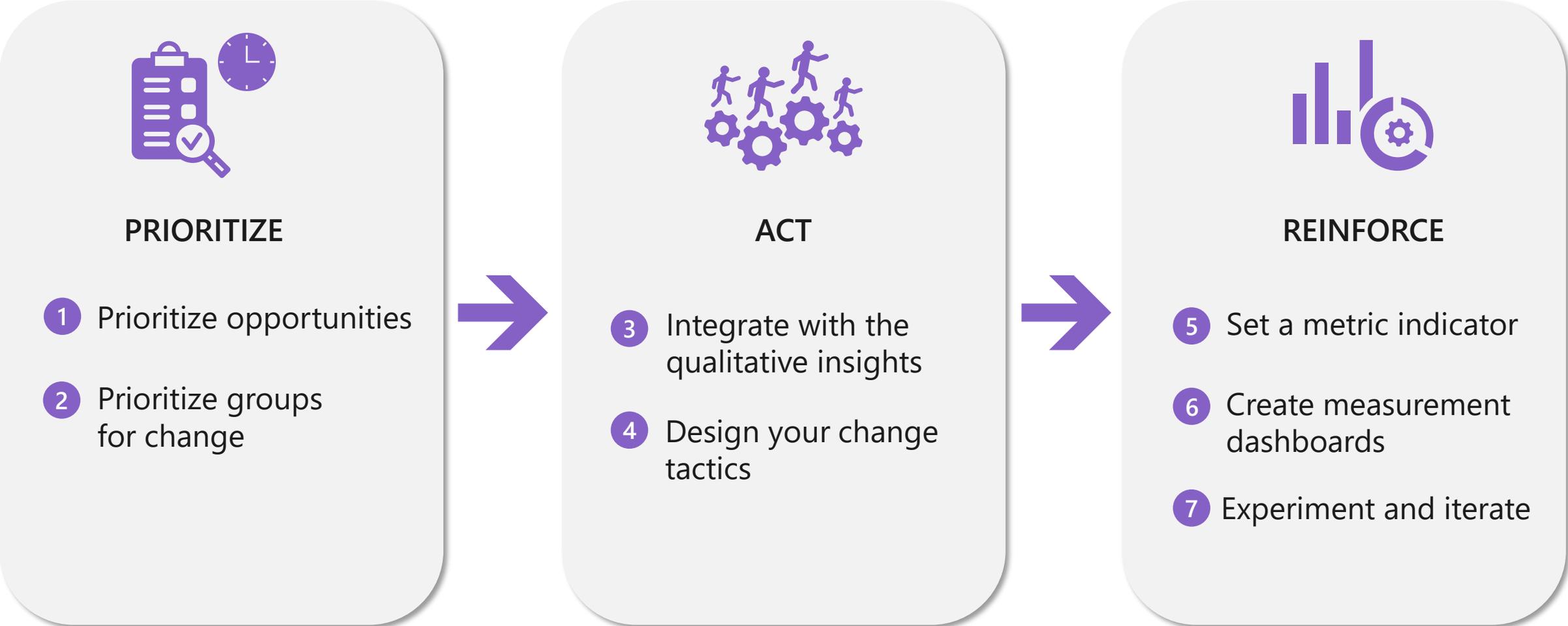
“We saw a huge shift in how people talked about their time and how they used their time”

Framework



Drive change and increase the likelihood of success

Note: This framework is a good start but is NOT the only way to drive change with Viva Insights. When available consider integrating with your existing change methodology or as an inspiration for new ways to act on insights.





Prioritize opportunities

Align Workplace Analytics with the company strategy and core business challenges

Consider the following

Identify business challenges that you would like to address

Determine which Workplace Analytics scenarios apply

Identify associated metrics that are relevant

What it says

Which scenarios to prioritize based on business impact.

See related playbooks for information on scenario-based analysis

The organization's current gaps in executing business strategy

Difficult to attract and retain top talent in a tight labor market with shifting employee expectations

Inefficient ways of working are reducing innovation

How you can use Workplace Analytics to address your top priorities

Boost employee engagement



Transform meeting culture



Key metrics associated with business goals

- Time in one-on-one meetings with manager
- After-hours collaboration

- Meeting hours
- Multitasking meeting hours



Prioritize opportunities

Use data to identify opportunities and act

Consider the following

Identify business challenges that you would like to address

Determine which Workplace Analytics scenarios apply

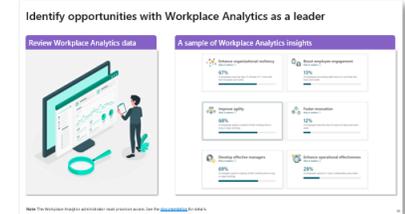
Identify associated metrics that are relevant

What it says

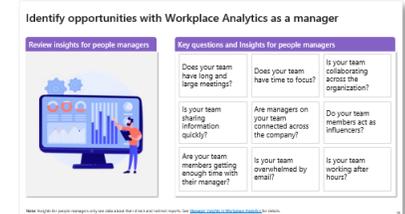
Which Workplace Analytics scenarios can we prioritize based on business impact.

See related playbooks for information on scenario-based analysis

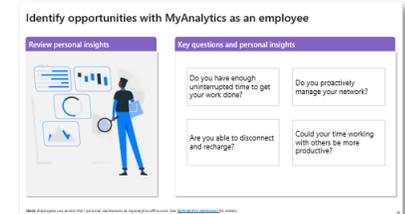
Leaders can identify opportunities with the Workplace Analytics Insights



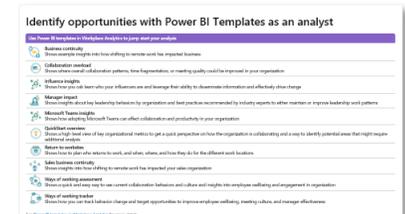
Managers can identify opportunities with the Insights for people manager's page



Employees can view personal insights through MyAnalytics



Analysts can identify opportunities with custom analysis and Power BI templates





Prioritize groups for change

Identify pilot groups that have a network influence and a large potential impact

Opportunity for improvement

Example signs of a group with a high opportunity for improvement include:

- A large percentage of employees that spend excessive time in long and large meetings
- A large number of managers with low 1:1 coaching rates
- A large number of employees with time spent in after hours collaboration

Network impact

Examples of a group with high network impact are those who might:

- Have a high influence rank
- Have a large network size
- Have a large network breadth
- Generate a large workload for other groups

Opportunity for improvement	High	Within team enablers <i>These groups exhibit insular collaboration but have an opportunity to improve their own team's behaviors</i>	High potential pilots <i>These groups have a large opportunity for improving their own team's behaviors and have networks that span across groups</i>
	Low	Low potential pilots <i>These groups exhibit the desired behaviors but lack the networks to reinforce these behaviors with other teams</i>	Change advocates <i>These groups already exhibit the desired behaviors but have networks that can help establish new social norms and impact behaviors across teams</i>
		Low	High

Network impact



Prioritize groups for change

Identify pilot groups that have an opportunity to improve and where a change could have large impact

Consider the following

Identify groups with a large opportunity for improvement

Identify groups with networks that might help drive success

What it says

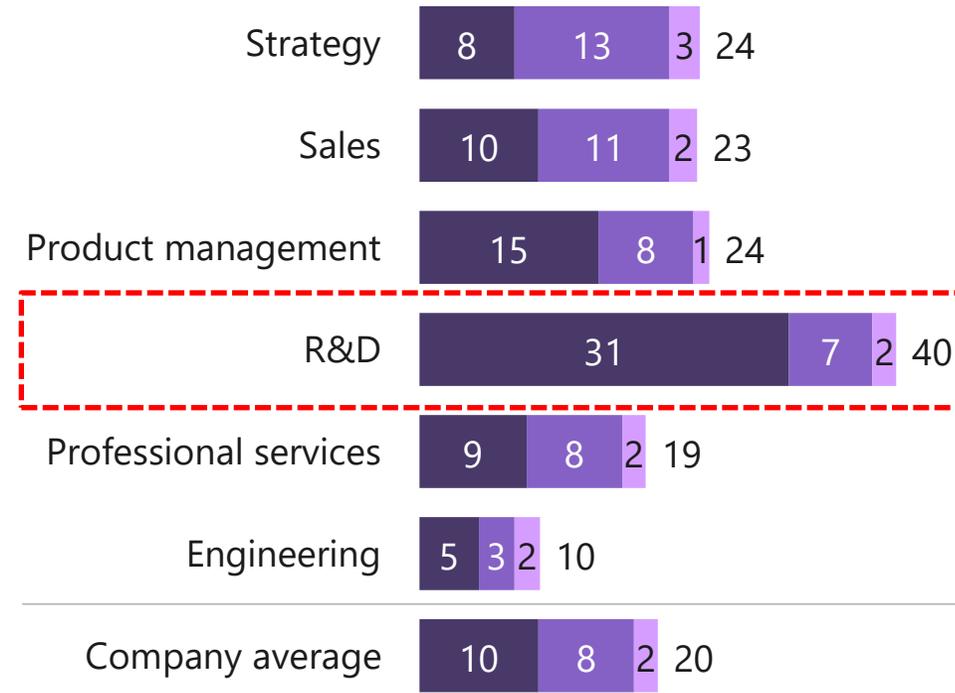
- The R&D organization has the highest amount of **time spent in meetings** and the largest amount of time spent in **after-hours collaboration**.
- High levels of collaboration during working hours can force spillover collaboration into after-hours time and contribute to burnout over time.

See [scenario-based analysis playbooks](#) for additional examples

Weekly collaboration hours and after-hours collaboration

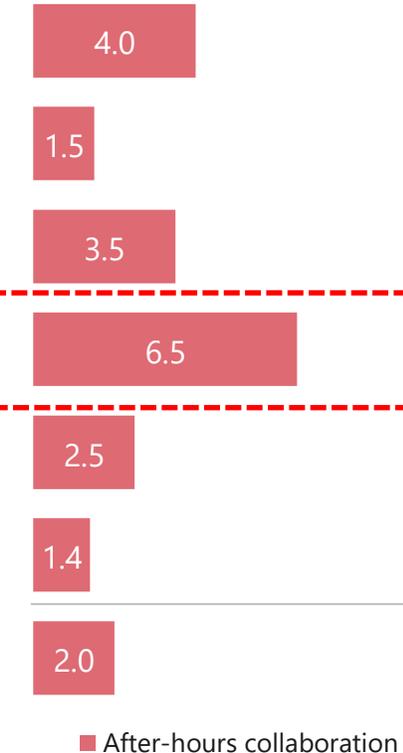
Average hours per person per week

Total collaboration time



■ Meetings ■ Email ■ Teams chats and ad-hoc calls

After-hours collaboration time



■ After-hours collaboration



Prioritize groups for change

Identify pilot groups with cross-organizational networks and where change might have a large impact

Consider the following

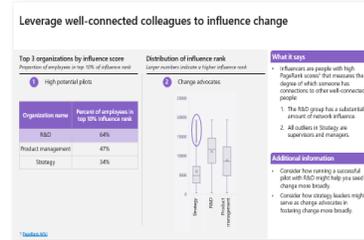
Identify groups with a large opportunity for improvement

Identify groups with networks that might help drive success

What it says

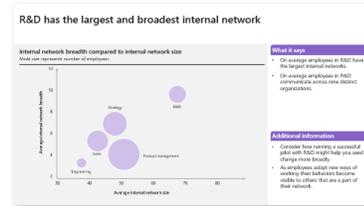
Which groups have networks that can help establish new behaviors across teams.

Network influence



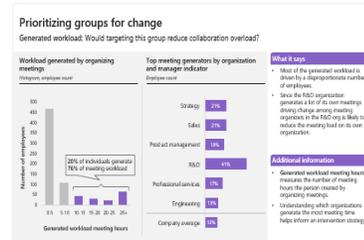
Successful transformations involve advocates who drive change and social norms through their network. Tapping into well connected colleagues can help accelerate change.

Network size and breadth



As employees adopt new ways of working their behaviors become visible to others that are a part of their network.

Generated workload



Generated workload meeting hours measures the number of meeting hours the person created by organizing meetings. Understanding which organizations generate the meeting time for other groups can help inform an intervention strategy.



Integrate with qualitative insights

Integrate qualitative insights to understand the “why”

Consider the following

Validate the insights

Identify causes

Crowdsource solutions

Measure progress in sentiment

Example questions

[Likert rating]

I am invited to too many meetings where my attendance is unnecessary.

[Ranking]

Rank the following top reasons for why you might be invited to an unnecessary meeting.

[Open Text]

What can be done to ensure that you and your team are not negatively affected by unnecessary meetings?

[Likert rating after time has elapsed]

I am invited to too many meetings where my attendance is unnecessary.



Integrate with qualitative insights

Integrate qualitative insights to understand the “why”

Consider the following

Validate the insight

Identify causes

Crowdsource solutions

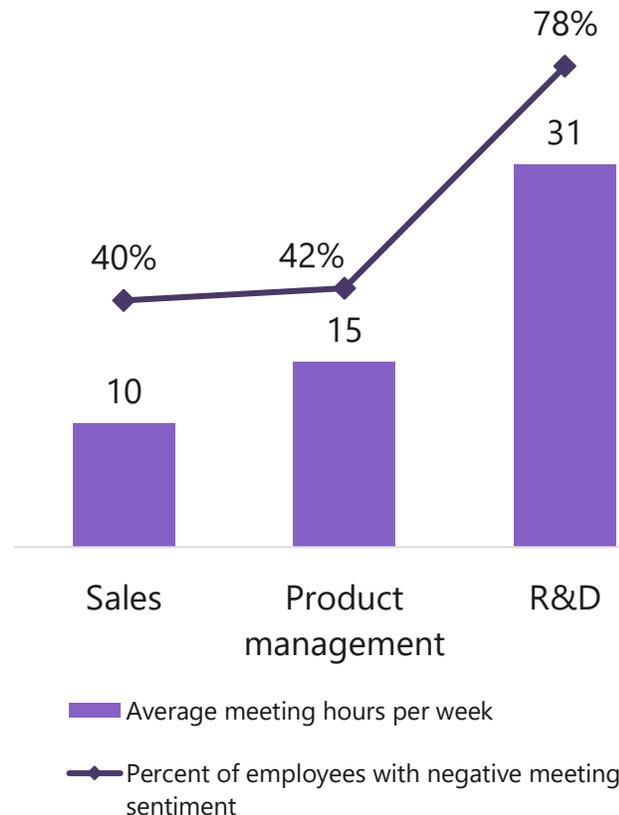
Measure progress in sentiment

What it says

- 78% of employees in the R&D group believe they are invited to too many meetings.
- The top reason for attending an unnecessary meeting is a lack of context provided prior to the meeting.

Example meeting culture sentiment

Validate the insight



Identify causes and crowdsource solutions

Which of the following is a top contributor to the time that you spend in unnecessary meetings?

	Percent of respondents
Meeting invites lack context or an agenda	71%
Information from meetings can be as effectively shared over an email or in Teams	36%
Leadership does not emphasize the importance of efficient meetings	34%
I don't want to leave anyone out on the invite	21%
I feel uncomfortable declining meeting invites	15%



Integrate with qualitative insights

Integrate qualitative insights to baseline and measure progress

Consider the following

Validate the insight

Identify causes

Crowdsource solutions

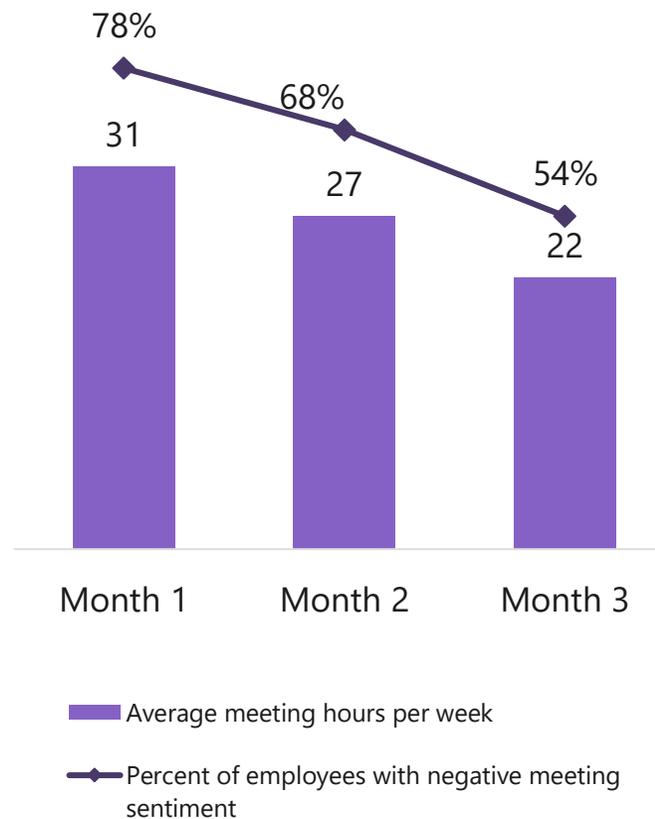
Measure progress in sentiment

What it says

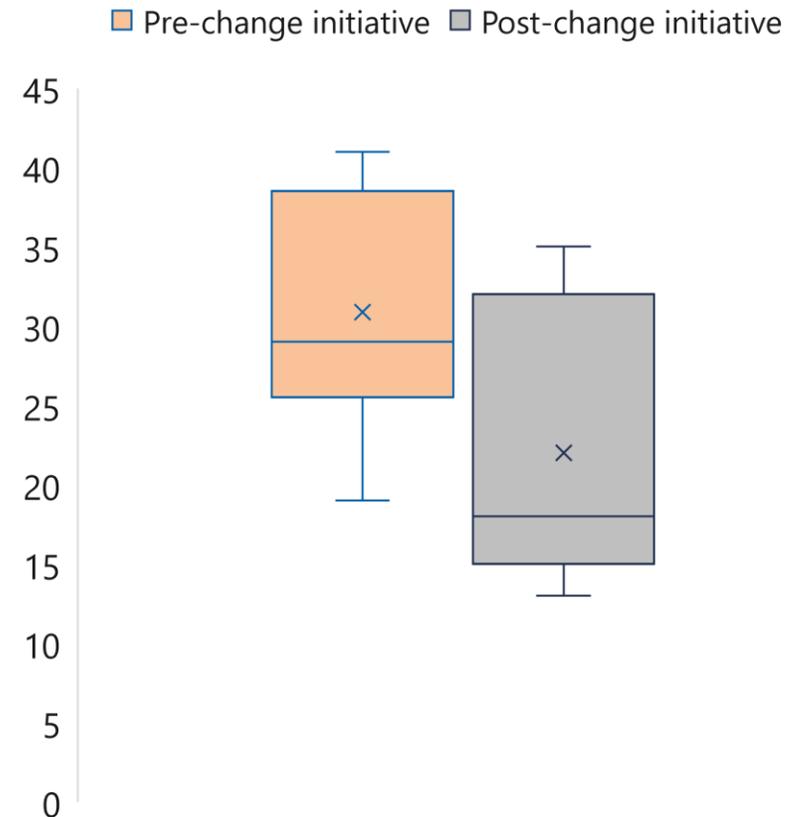
- Negative meeting sentiment and average meeting hours per week decrease three months after changes.
- An opportunity might exist to address those who have not experienced a change in meeting sentiment.

Example meeting culture sentiment

Measure progress in sentiment



Change in distribution of average meeting hours





Design your change tactics

Integrate technology solutions with your existing change methodology

Consider the following

Use technology to help drive the change

Communicate and provide training to drive adoption

Review existing change tactics

Leverage your employees to co-create solutions

Plans

Use Plans in Workplace Analytics to create improvement plans for employees, with the goal of changing their work habits for the better



- Leaders, and analysts can use Plans in [Workplace Analytics](#)
- Managers can create plans in [Insights for people managers](#)
- Anyone can use a [focus plan](#) in their MyAnalytics dashboard

Insights Outlook add-In

This Outlook add-in extends the Outlook experience to help gain focus time, maintain work relationships, plan time away from work, and improve overall work-life balance



Anyone with a MyAnalytics license [can use this](#)

Inline suggestions

Inline suggestions in Outlook are brief, AI-driven notifications that are shown in Outlook when either reading or composing an email or a meeting invitation



Anyone using Outlook with Microsoft 365 licenses [can use this](#)

MyAnalytics productivity insights

Educational cards that give work productivity and wellbeing tips. MyAnalytics refreshes these cards periodically to reflect a person's most recent work patterns



Anyone with a MyAnalytics license [can use this](#)



Design your change tactics

Integrate technology solutions with your existing change methodology

Consider the following

Use technology to help drive the change

Communicate and provide training to drive adoption

Review existing change tactics

Leverage your employees to co-create solutions

What should you communicate to employees?

Product descriptions: Include product purposes and benefits in the descriptions

Business reasons: Communicate the top reasons why these products will help the business

Employee benefits: Communicate the benefits of the products from the employee perspective

Data and privacy: Address data and privacy concerns

Rollout details: Include information on when people will have access (after considering available licenses)

Support: Communicate where employees can go for more information



Design your change tactics

Leverage learnings and best practices to build additional change tactics

Consider the following

Use technology to help drive the change

Communicate and provide training to drive adoption

Review existing change tactics

Leverage your employees to co-create solutions

Review best practices and research



Manager coaching

Learn how to best mentor and support your employees, including regularly scheduled one-on-ones.



Wellbeing

Discover best practices to improve work-life balance and increase team productivity and wellbeing.



Meetings

Learn how to plan and facilitate meetings that best meet the goals of your team and organization.



Focus

Learn why it's important that you and your team plan and schedule focus time to get independent work done.



Manager connectedness

Learn why sharing ideas and expertise across the company make for more successful organizations.



Email overload

Learn how to minimize email by setting up team rules that match up to with well-known best practices.



Efficient communications

Learn how to set up team communication to improve agility, speed up access to information, and increase productivity.



Cross-group collaboration

Learn how to network with other managers to share information and skills across the different groups.



Influencers

Learn how more change agents can lead your team and your company to be more agile and competitive.



Customer focus

Learn how spending time collaborating with customers helps you better anticipate customer's needs and develop products and services that create real value.



Community connectivity

Learn how creating a work community helps improve overall team wellbeing and productivity.

[Best practices in Workplace Analytics](#)

Review research and change tactics

- [The condensed guide to running meetings](#) explains a few new ideas that help make meetings more effective
- Enable [Manager insights in Workplace Analytics](#) to help managers identify ways to improve team behavior
- Work expands to the time allotted for it. Change meeting length defaults from 60 to 45 minutes and from 30 to 25 minutes



Design your change tactics

Involve people who will be impacted by the change to help be advocates

Consider the following

Use technology to help drive the change

Communicate and provide training to drive adoption

Review existing change tactics

Leverage your employees to co-create solutions

Example manager workshop

Review insights

- Review your manager insights
- Select one to three areas to improve
- Set a goal

Choose change tactics

- Review and select change tactics
- Add additional actions you and your team can take

Take action

- Share in your next team meeting and collaborate with your team to improve
- Set a checkpoint to re-visit progress

Example:

Long and large meetings

Insight

70%

of your team spends a majority of their meeting time in long or large meetings.



What can you do?

Suggested Interventions

- Support shortening meetings and inviting fewer people
- Reduce duration and attendees with a meeting attendance checklist and meeting audit
- Empower employees to say no to meetings

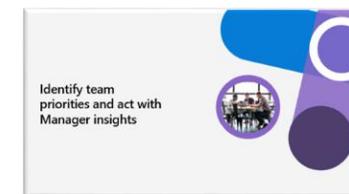
Share and track progress

Actions

- Schedule recurring manager-team discussions to define opportunities and next steps
- Check in regularly with the team to track progress to team goals

Examples

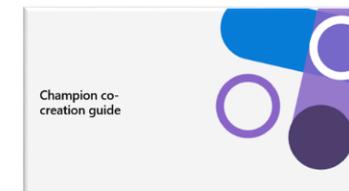
Manager action plan guide



Manager discussion guide



Champion co-creation guide





Set a metric indicator

Use data to understand what “good” looks like and to predict when action is needed

Consider the following

Set an indicator based on research

Set an indicator based on the distribution

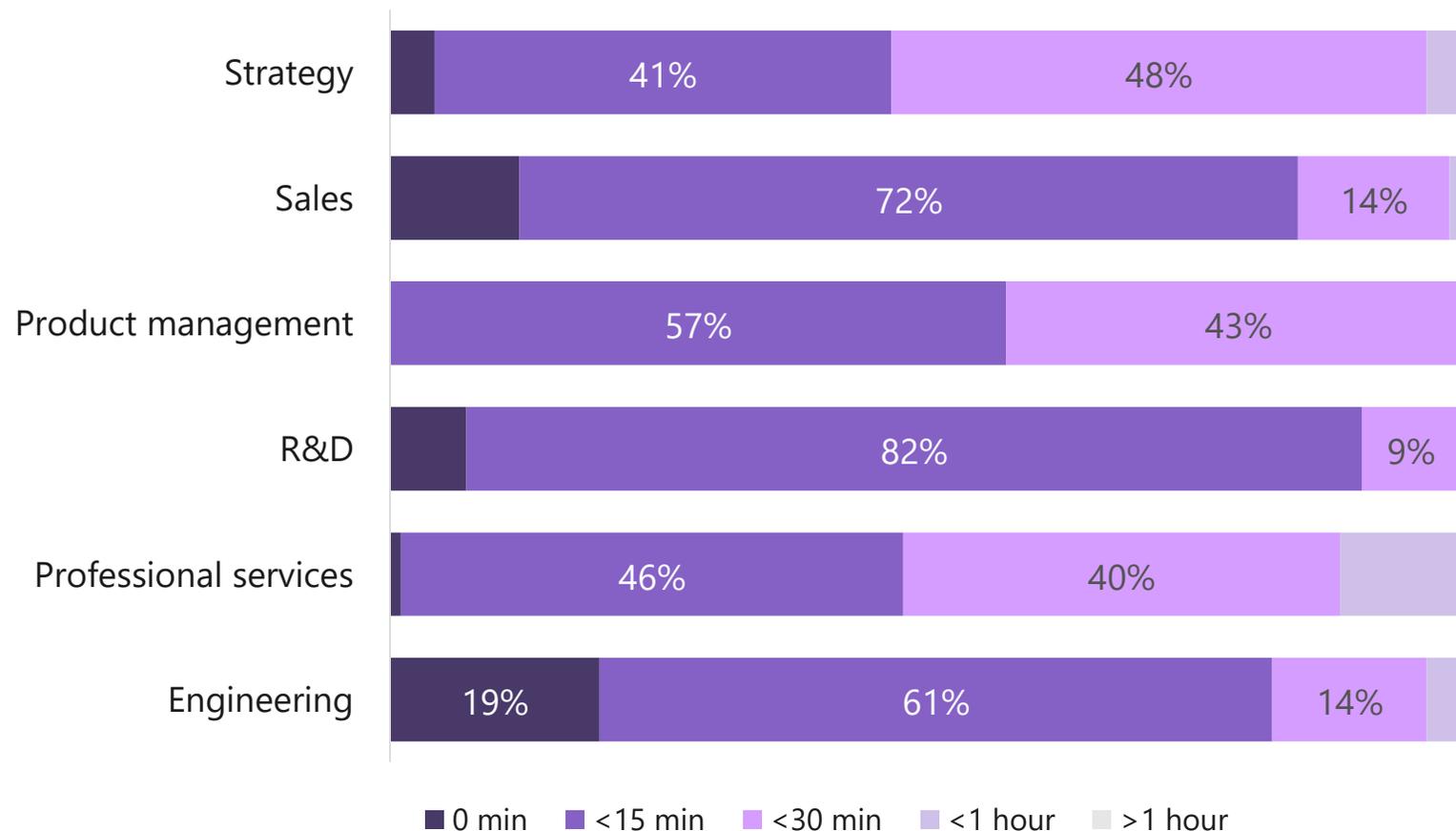
Set an indicator based on relationships with survey data

What it says

- [Research shows](#) that employees who regularly have 1:1 time with their managers are more likely to be engaged.
- Weekly manager 1:1 time indicates that many employees have regular 1:1s.
- Employees with less than 15 minutes a week of manager 1:1 time, might benefit from more regular check-ins and manager coaching.

Distribution of employees by weekly manager 1:1 time

Percentage of employees





Set a metric indicator

Use data to understand what “good” looks like and to predict when action is needed

Consider the following

Set an indicator based on research

Set an indicator based on the distribution

Set an indicator based on relationships with survey data

What it says

There is a statistically significant connection with after-hours meetings and teams that respond negatively about work-life balance as compared to other teams. Using a threshold of three weekly after-hours meetings might help highlight those risks.

Identify an indicator using survey outcomes

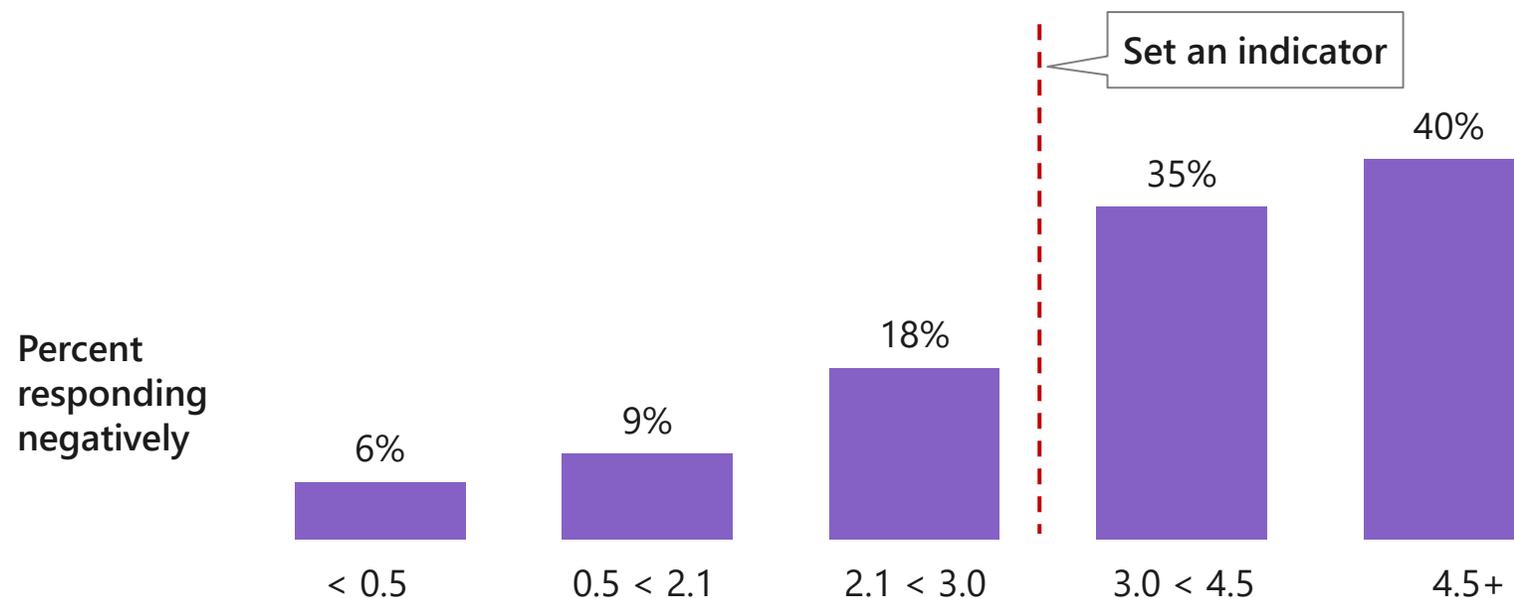
After-hours meetings and wellbeing

Average weekly hours in after-hours meetings

Outcome: Employees can maintain a reasonable balance between personal life and work life

Negative responses: Disagree or strongly disagree

P-value¹ = 0.02



¹ Leverage a test to determine if there is a significant difference between the means of two groups



Create a measurement dashboard

Empower employees to track progress and measure results

Consider the following

Create a new dashboard

Integrate with an existing dashboard

What it says

- The main dashboard tracks the progress over time.
- A metric indicator of 3 hours in after-hours meetings is used to identify the potential impact to employee work-life balance.

Main dashboard

		Metric value (over time)		
Desired outcome	Metric title	May	Jun	July
Work-life balance	After-hours meeting fatigue	70%	60%	32%

Glossary

Desired outcome	Metric title	Metric definition	Supporting research
Work-life balance	After-hours meeting fatigue	Percent of employees with more than 3 hours in after-hours meetings	Pressure to "always be on" and long hours can lead to employee burnout HBR: How to cope with that "Always-On" feeling



Create a measurement dashboard

Empower employees to track progress and measure results

Consider the following

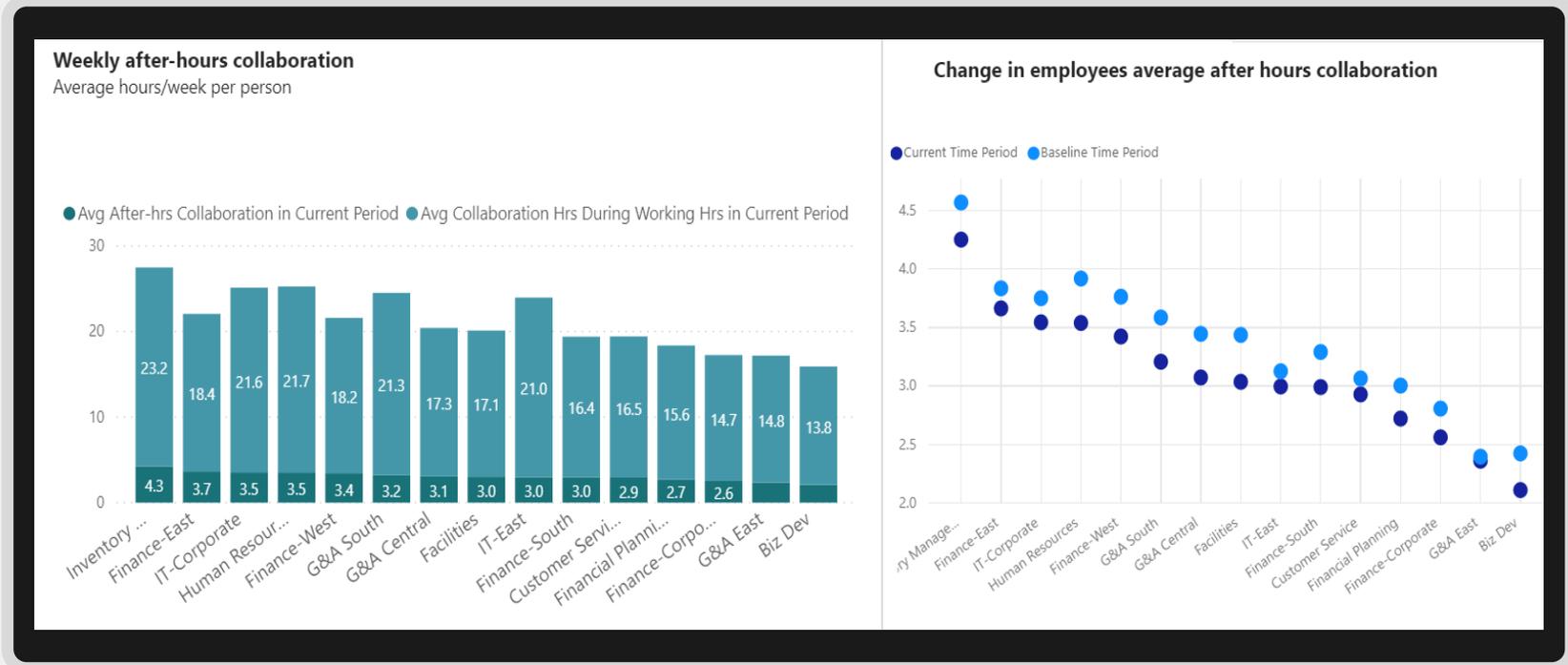
Create a new dashboard

Integrate with an existing dashboard

What it says

- The ways of working tracker shows how you can track behavior change and target opportunities to improve employee wellbeing, meeting culture, and manager effectiveness.
- Consider integrating with other dashboards you might already be visible to business leaders.

Ways of working tracker



See [Power BI Ways of working tracker](#) for setup instructions

See [Power BI templates in Workplace Analytics](#) to learn what's available



Experiment and Iterate

Learn what works and address what does not

Consider the following

Conduct experiments within groups

Experiment across groups

What it says

- The lack of behavior change could indicate that the change tactic is not addressing the root cause of meeting fatigue.
- Leverage qualitative insights to iterate the change tactics and leverage quantitative insights to measure changes in behavior.

Experimenting within groups

Primary Change Tactic	Results after 3 months	Result	Action
Bi-monthly meeting free day	1% of employees with after-hours meeting fatigue	No significant change	Determine root cause and if the change team can help

Brainstorm root causes of time spent in after hours meetings?	Validate with others and consider a survey or co-creation workshop	Modify change tactic
Too many meetings during working hours lead to increased after-hours collaboration	Unlikely to be the primary problem	Rotate meetings across different time zones
Inconvenient timing of meetings due to a headquarters centric mindset	Rated as a common occurrence	
Lack of visibility into colleagues' working time zones	Unlikely to be the primary problem	



Experiment and iterate

Learn what works and address what does not

Consider the following

Conduct experiments within groups

Experiment across groups

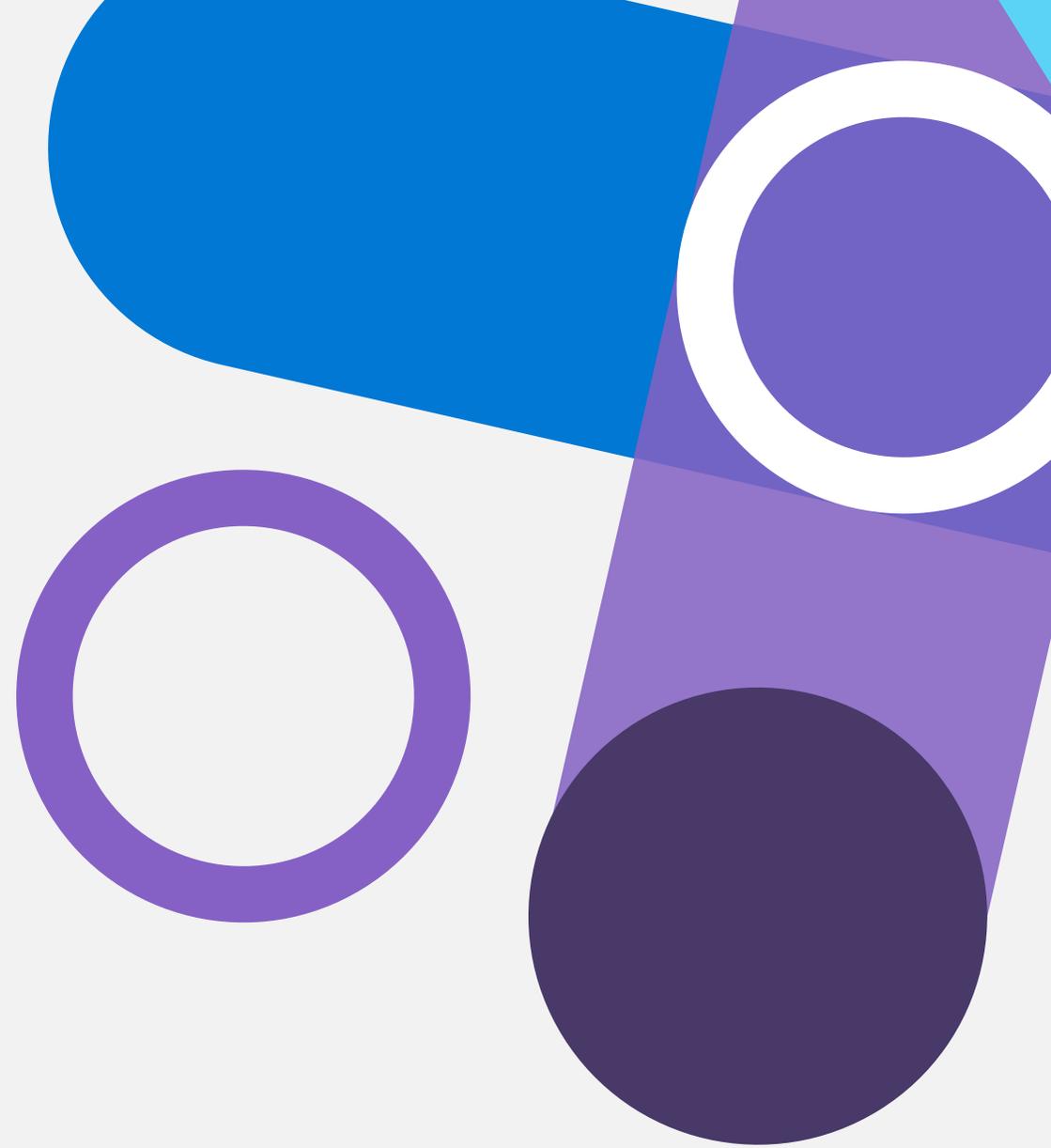
What it says

By measuring the effectiveness of your change interventions, you can identify what works and iterate on your approach when it doesn't. Compare progress across multiple populations to identify root causes and improve the likelihood of behavior change.

Experimenting within groups

	Primary Change Tactic	Result after 3 months	Result	Action
Group 1	Bi-Monthly meeting free day	28% employees with after hours meeting fatigue	Strong trend in direction of successful change.	Consider promoting and scaling bi-monthly meeting day to other groups
Control group 1	No change tactic	2% employees with after hours meeting fatigue	No significant change	
Group 2	Rotate cross-geo team meetings	11% employees with after hours meeting fatigue	Moderate trend in direction of successful change	
Group 3	Automatic out of office messages after-hours	2% employees with after hours meeting fatigue	No significant change	

Project guidelines



Getting started and driving behavior change with insights

Consider the following when embarking on your change journey

Stakeholder engagement



- Have you informed all the key stakeholders in your analysis?
- Have you secured sponsorship, data usage approvals, and commitment from these stakeholders in compliance with all local laws and regulations concerning the use of this data?
- Are there existing change initiatives already underway that your analysis will inform and measure?
- Who will drive the change? Will change practitioners and champions be involved?
- How will employees be held accountable for their role in driving the change?

Employee scope



- What types of employees are being considered in the analysis? Note that work patterns of employees whose work is primarily transactional (customer service, call centers, operations) will not be well-represented by Workplace Analytics metrics.
- Are you focusing on a specific region or taking a global view? Cultural differences might need to be taken into consideration when examining how to best drive change.
- Are you able to identify comparison populations that can serve as control groups when implementing change interventions?
- Have contractors and consultants been excluded from scope?

Organizational data and optional survey data



- Do you have all relevant attributes to ensure you can identify peer groups by level, function and region?
- Are selected survey question responses either uploaded as organizational data or available for merging through an anonymized key?
- Is the organizational data in Workplace Analytics reflective of the time frame you plan to select below?

Timeframe



- What timeframe should be used for this analysis?
 - When creating a measurement dashboard consider a rolling three-to-six-month time frame
 - When measuring the effectiveness of change interventions use the next month to measure immediate impact and a three-to-six-month time frame to measure sustained change
 - When examining survey relationships, select the 3-6 months of Workplace Analytics data leading up to the engagement survey

Create value by driving data-backed behavior change

Tiered process to take insights to action

Prioritize

The most impactful initiatives address core business issues

- 1 *Prioritize opportunities by aligning analytics to business strategy*
- 2 *Prioritize groups based on potential impact and network influence*

Act

Develop plans to maximize the likelihood of successful change

- 3 *Integrate with qualitative insights to understand the "Why"*
- 4 *Design your change tactics with a combination of technology and tailored change strategy*

Reinforce

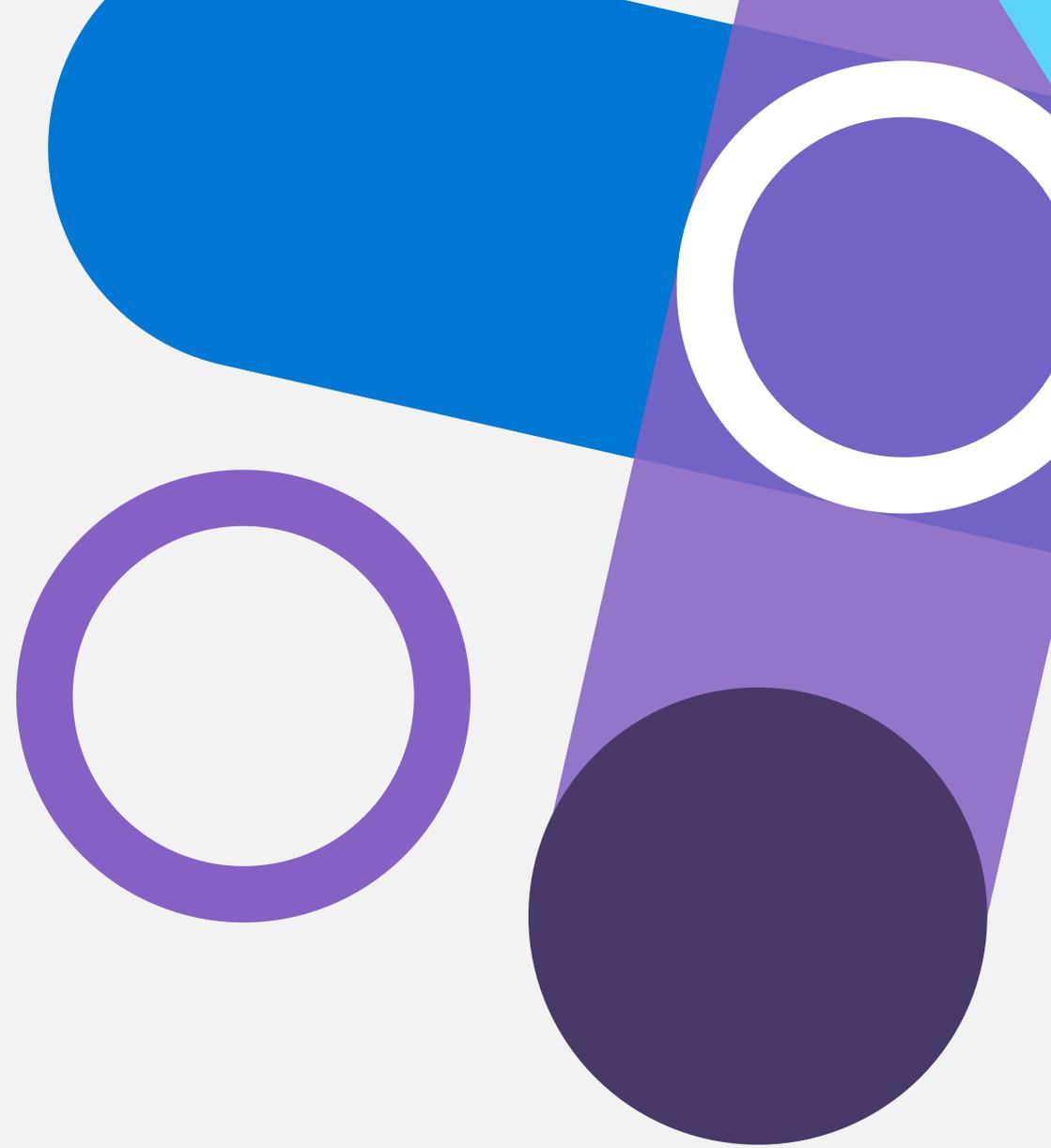
A project is only successful if it delivers quantifiable business value

- 5 *Set a metric indicator to track progress*
- 6 *Create measurement dashboards to drive accountability*
- 7 *Experiment and iterate to drive measurable results*

Reinforce accountability at all levels of the organization

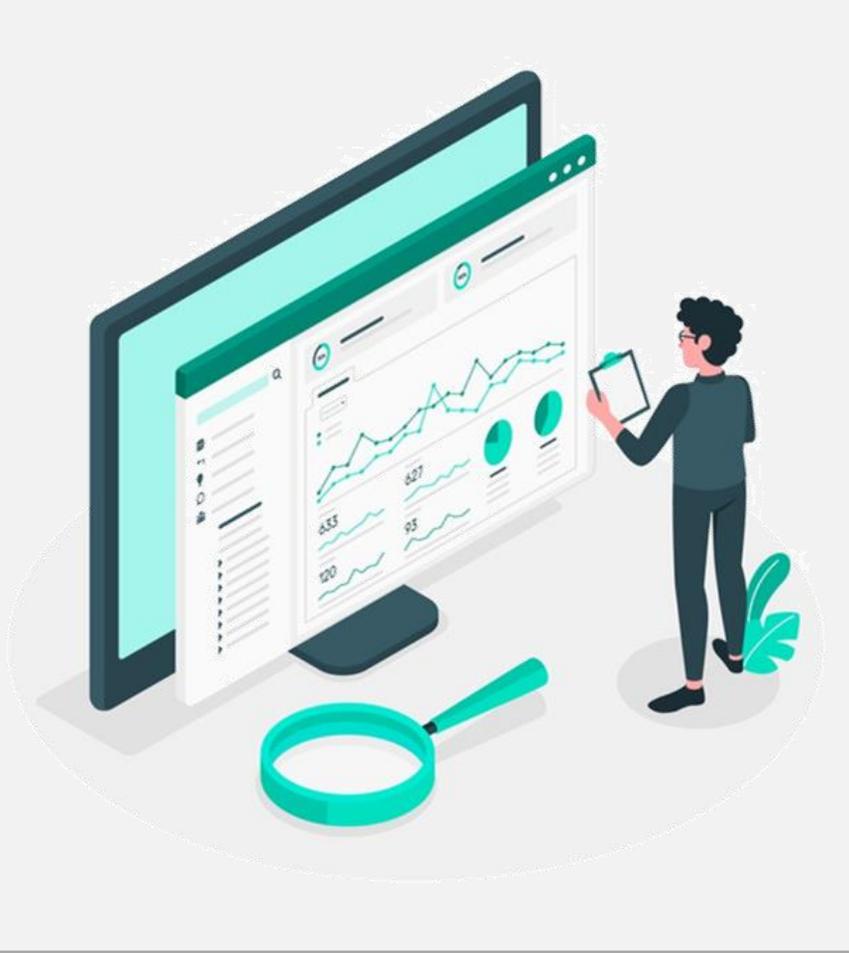
Example change team resources		
Category	Role	Examples
Sponsorship	An executive sponsor	<ul style="list-style-type: none"> • COO • CHRO • VPs
Analytics and measurement	Workplace Analytics lead	<ul style="list-style-type: none"> • Director of people analytics • Director of Organizational development
	Workplace Analytics analyst	<ul style="list-style-type: none"> • Data analyst • Data scientist
Change management	Change management lead	<ul style="list-style-type: none"> • Director of change management • Director of transformation
	Project coordinator	<ul style="list-style-type: none"> • Communications specialist • Project manager
	Champions	<ul style="list-style-type: none"> • Business unit sponsors • Managers • Culture champions

Appendix: Deep dive examples



Identify opportunities with Workplace Analytics as a leader

Review Workplace Analytics data



A sample of Workplace Analytics insights

 Enhance organizational resiliency Why it matters ⓘ 67% of employees have less than 15 minutes of 1:1 time with their managers each week 	 Boost employee engagement Why it matters ⓘ 13% of employees are working after hours for more than five hours each week 
 Improve agility Why it matters ⓘ 68% of employees spend a majority of their meeting time in long or large meetings 	 Foster innovation Why it matters ⓘ 12% of employees have less than 20 hours for deep work each week 
 Develop effective managers Why it matters ⓘ 69% of managers spend a majority of their meeting time in long or large meetings 	 Enhance operational effectiveness Why it matters ⓘ 28% of employees spend 25+ hours collaborating every week 

Note: The Workplace Analytics administrator must provision access. See the [documentation](#) for details.

Identify opportunities with Workplace Analytics as a leader

Review insights for people managers

1. **Understand** how after-hours work can impact employee burnout and use the supporting evidence to learn more
2. **Identify** the percentage of employees who spend a significant amount of time collaborating during after hours
3. **Review** your recommended actions and begin your plan to drive change

Review and decide whether you would like to act on this insight

Prevent employee burnout

Long hours and the pressure to always be on can lead to employee burnout. The amount of time employees spend collaborating outside of business hours is an indicator of burnout risk.

1

79%

of employees are working after hours for more than five hours each week

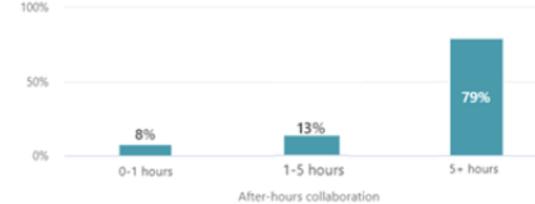
Supporting evidence

[How we define after-hours collaboration](#)

2

Distribution of weekly after-hours collaboration

Percentage of employees



3

Take action

Help employees disconnect
You have 3 recommended action(s)

[See your insights >](#)

Identify opportunities with Workplace Analytics as a manager

Review insights for people managers



Key questions and Insights for people managers

Does your team have long and large meetings?

Does your team have time to focus?

Is your team collaborating across the organization?

Is your team sharing information quickly?

Are managers on your team connected across the company?

Do your team members act as influencers?

Are your team members getting enough time with their manager?

Is your team overwhelmed by email?

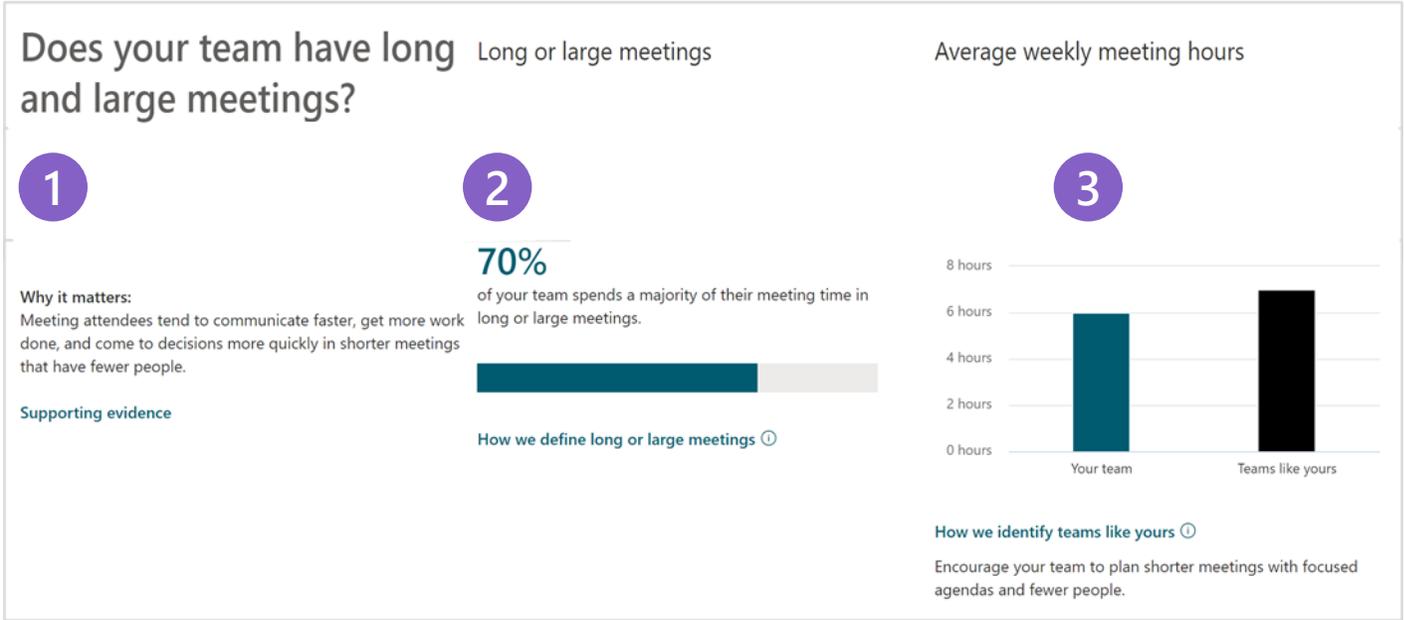
Is your team working after hours?

Identify opportunities with Workplace Analytics as a manager

Review Insights for people managers

1. **Understand** how long and large meetings factor into Wellbeing. Use the supporting evidence to learn more
2. **Identify** the percentage of your team who spend over half their meeting time in long or large meetings (greater than or equal to one hour or with more than eight attendees)
3. **Compare** average weekly meeting hours between your team and teams like yours that also report to your manager

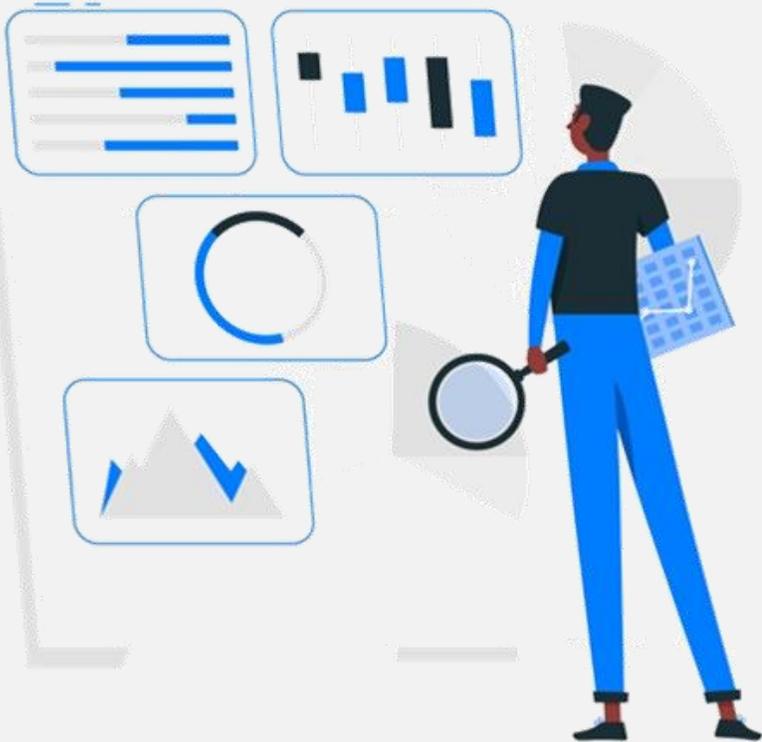
Review and decide whether you would like to act on this insight



Note: Insights for people managers only see data about their direct and indirect reports. See [Manager insights in Workplace Analytics](#) for details.

Identify opportunities with MyAnalytics as an employee

Review personal insights



Key questions and personal insights

Do you have enough uninterrupted time to get your work done?

Do you proactively manage your network?

Are you able to disconnect and recharge?

Could your time working with others be more productive?

Identify opportunities | As an employee with MyAnalytics

Review personal insights

- 1. Review the home page for high-level insights
- 2. Select the links to dive into the more data for each topic area
- 3. Review productivity insights for trends from recent work habits

The screenshot displays the MyAnalytics dashboard with the following components:

- 1. Overview:** "Your work patterns the last 4 weeks" with a "Launch tour" link.
- Focus:** "Do you have enough uninterrupted time to get your work done?" with a 90% "Availability to focus" gauge. Description: "This is the time you typically have leftover to focus on your tasks outside of meetings, emails, chats and calls." Link: "Make more time to focus >".
- Wellbeing:** "Are you able to disconnect and recharge?" with a 19 "Quiet days" gauge. Description: "These are days without interruptions of meetings, emails, chats and calls outside your working hours set in Outlook." Link: "Explore daily breakdown >".
- Network:** "Do you proactively manage your network?" with a 32 "Active collaborators" gauge. Description: "These are people you have recently contacted through meetings, emails, chats and calls." Link: "Explore all collaborators >".
- Collaboration:** "Could your time working with others be more productive?" with a 40% "Collaboration" gauge. Description: "This is the percentage of your time spent in meetings, emails, chats and calls." Link: "Explore collaboration habits >".
- 2. Navigation Menu:** A vertical teal sidebar with icons and labels for Home, Focus, Wellbeing, Network, and Collaboration.
- 3. Detailed Insight:** A card titled "Respond to meetings on time" with an icon of an envelope and a clock. Text: "You did not respond to 10% of your meeting requests last month." Link: "View Suggestions". Feedback: "Is this helpful?" with thumbs up/down icons.

Note: Employees can access their personal dashboards at myanalytics.office.com. See [MyAnalytics dashboard](#) for details.

Identify opportunities with Power BI Templates as an analyst

Use Power BI templates in Workplace Analytics to jump start your analysis



Business continuity

Shows example insights into how shifting to remote work has impacted business



Collaboration overload

Shows where overall collaboration patterns, time fragmentation, or meeting quality could be improved in your organization



Influence insights

Shows how you can learn who your influencers are and leverage their ability to disseminate information and effectively drive change



Manager impact

Shows insights about key leadership behaviors by organization and best practices recommended by industry experts to either maintain or improve leadership work patterns



Microsoft Teams insights

Shows how adopting Microsoft Teams can affect collaboration and productivity in your organization



QuickStart overview

Shows a high-level view of key organizational metrics to get a quick perspective on how the organization is collaborating and a way to identify potential areas that might require additional analysis



Return to worksites

Shows how to plan who returns to work, and when, where, and how they do for the different work locations



Sales business continuity

Shows insights into how shifting to remote work has impacted your sales organization



Ways of working assessment

Shows a quick and easy way to see current collaboration behaviors and culture and insights into employee wellbeing and engagement in organization



Ways of working tracker

Shows how you can track behavior change and target opportunities to improve employee wellbeing, meeting culture, and manager effectiveness

Leverage well-connected colleagues to influence change

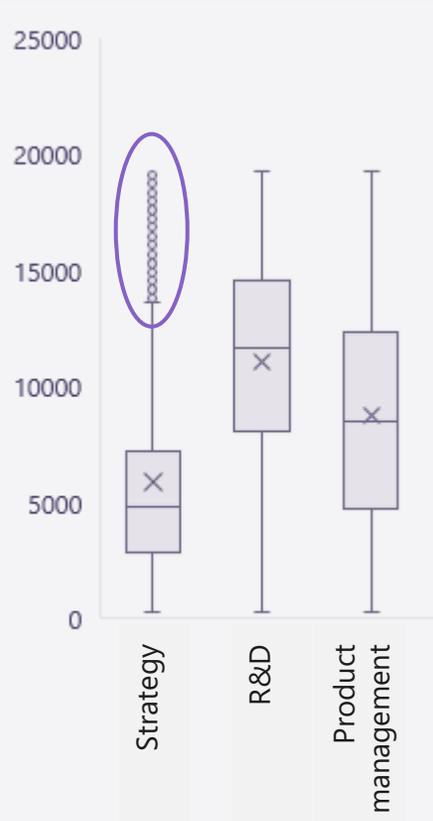
Top 3 organizations by influence score *Proportion of employees in top 10% of influence rank*

1 High potential pilots

Organization name	Percent of employees in top 10% influence rank
R&D	64%
Product management	47%
Strategy	34%

Distribution of influence rank *Larger numbers indicate a higher influence rank*

2 Change advocates



What it says

- Influencers are people with high PageRank scores¹ that measures the degree of which someone has connections to other well-connected people:
 1. The R&D group has a substantial amount of network influence.
 2. All outliers in Strategy are supervisors and managers.

Additional information

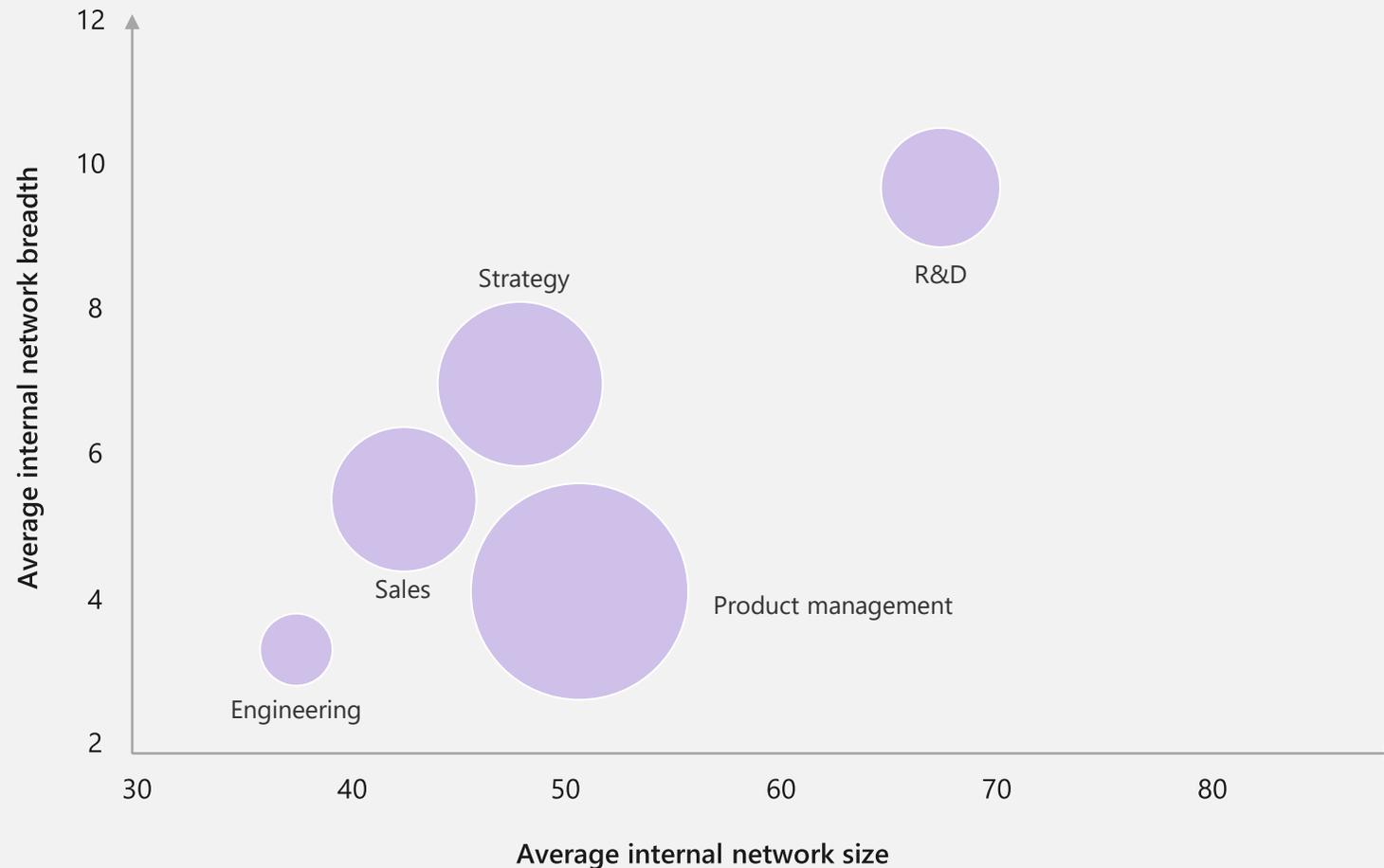
- Consider how running a successful pilot with R&D might help you seed change more broadly.
- Consider how strategy leaders might serve as change advocates in fostering change more broadly.

¹ [PageRank Wiki](#)

R&D has the largest and broadest internal network

Internal network breadth compared to internal network size

Node size represents number of employees



What it says

- On average employees in R&D have the largest internal networks.
- On average employees in R&D communicate across nine distinct organizations.

Additional information

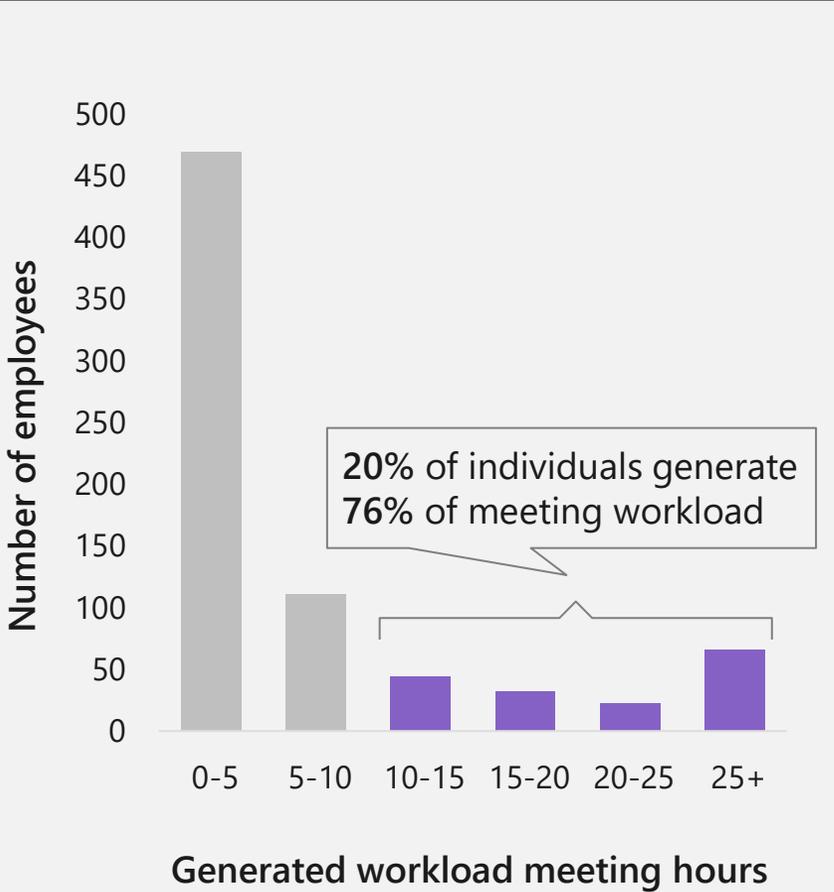
- Consider how running a successful pilot with R&D might help you seed change more broadly.
- As employees adopt new ways of working their behaviors become visible to others that are a part of their network.

Prioritizing groups for change

Generated workload: Would targeting this group reduce collaboration overload?

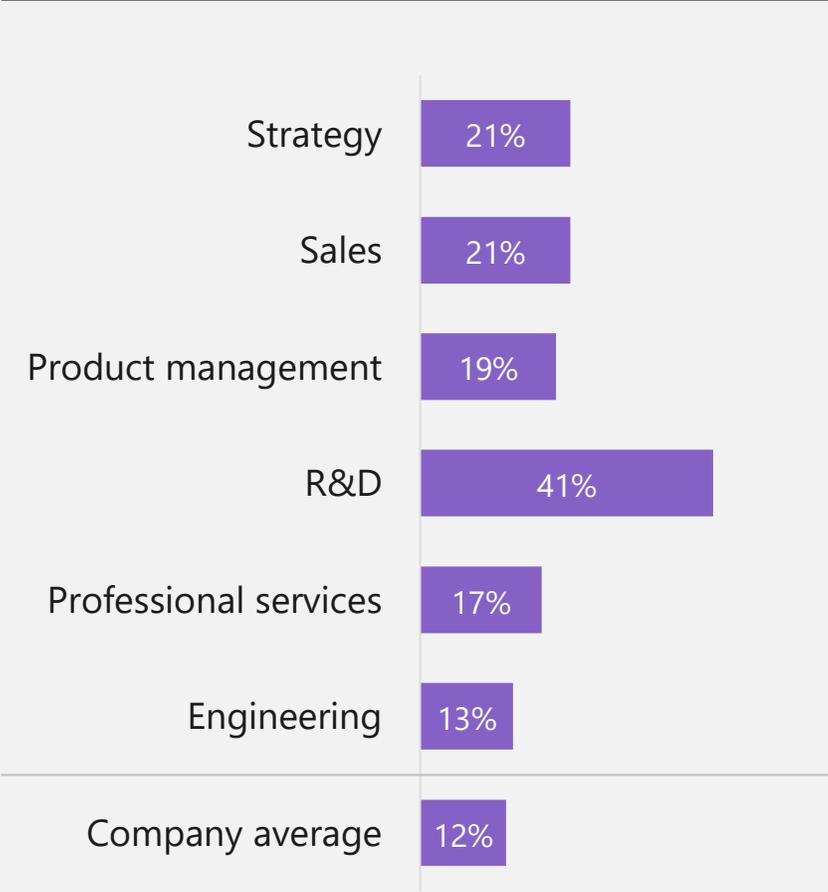
Workload generated by organizing meetings

Histogram, employee count



Top meeting generators by organization and manager indicator

Employee count



What it says

- Most of the generated workload is driven by a disproportionate number of employees.
- Since the R&D organization generates a lot of its own meetings driving change among meeting organizers in the R&D org is likely to reduce the meeting load on its own organization.

Additional information

- **Generated workload meeting hours** measures the number of meeting hours the person created by organizing meetings.
- Understanding which organizations generate the most meeting time helps inform an intervention strategy.

Plans

Note: Product features are subject to change. For the latest information, see the [documentation](#).

Leaders, managers, and analysts who launch a plan can:

- Identify groups whose workplace effectiveness could be improved
- Set up 12-week plans for the identified groups
- Measure the progress of the plan while it's underway

Focus plan: Help participants get more time to do deep work and reclaim their calendar for work that matters most

Collaboration plan: Help participants reduce the number of excess meetings that the group schedules

Wellbeing plan: Help participants unwind and protect their personal time by disconnecting in their off-hours

Seller success plan: Help participants prioritize time, increase network quality and size and connect with the right roles

The participant of a plan

- Get access to Team plans in MyAnalytics
- Get additional section in weekly email digests that summarize plan progress

Collaboration and Wellbeing plans only

- Additional inline suggestions are enabled for *(broadly available suggestions will be in regardless of plan enrollment)*

Focus plan only

- [Automatic booking of focus time](#) reserves time in calendars two weeks in advance

Outlook Insights add-in

Note: Product features are subject to change. For the latest information, see the [documentation](#).

What can the Outlook Insights add-in help with?

1. [Prepare for your meetings](#): Prepare for your meetings and then drive more effective meetings
2. [Track email and document open rates](#): Track readership of emails that you've sent by viewing the percentage open rate, the percentage attachment click rate, and so on
3. [View outstanding tasks](#): Make sure nothing falls through the cracks by seeing reminders of tasks that you've agreed to do
4. [Follow up on your requests](#): Receive reminders to follow up on commitments made by your colleagues or on requests that you have made
5. [Book time to focus](#): Protect your calendar by reserving focus time before meetings take over
6. [Catch up on email](#): Cut through the clutter with a summary of unread email from your more important contacts
7. [Catch up on documents](#): See a list of shared OneDrive and SharePoint documents that you need to catch up on
8. [Add important people](#): Manage your list of important contacts. You'll see reminders when you have tasks to complete for these people or unread emails from them
9. [Set lunch hours](#): Use to protect your lunch hours and personalize your insights
10. [Plan your time away](#): Use to plan your time away from work
11. [Catch up with your team](#): Stay on top of your team's needs with insights for 1:1 meetings, outstanding tasks, and so on
12. [Meeting suggestions](#): Grow and nurture your network by staying connected with important colleagues
13. [Check quiet hours impact](#): Help your team achieve work-life balance by reviewing the impact of sending email outside of working hours

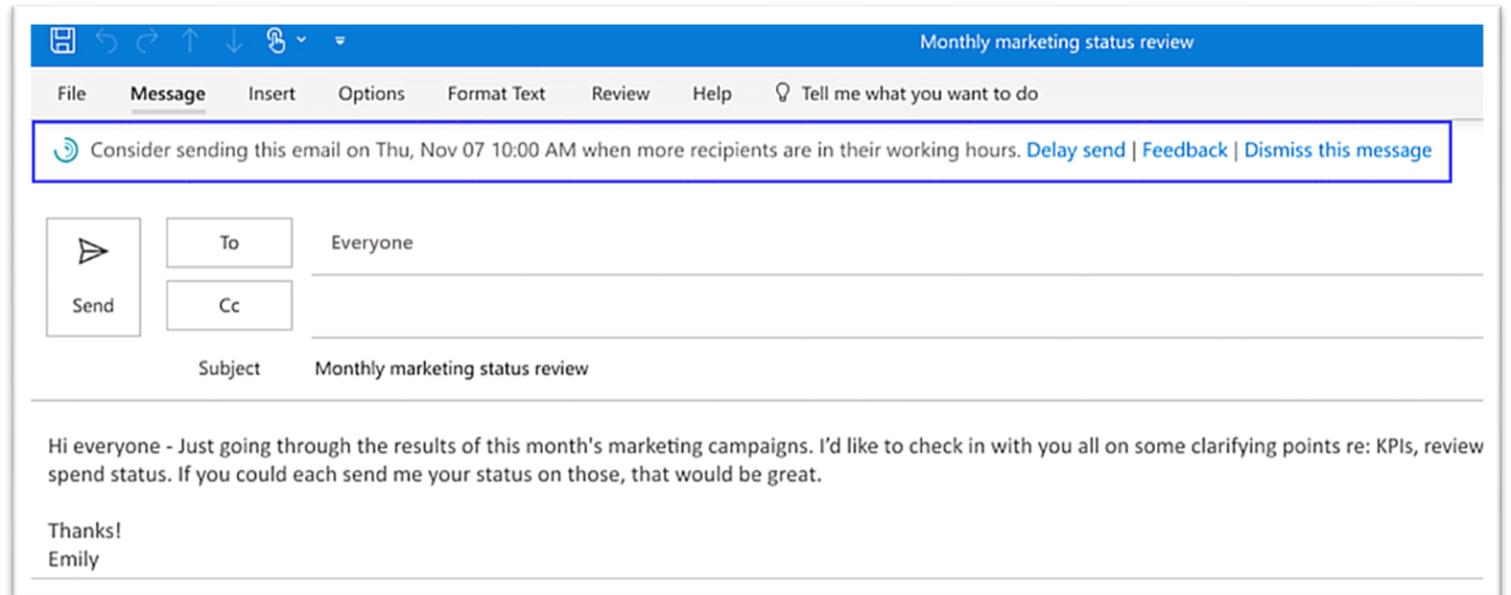
Inline suggestions

Note: Product features are subject to change. For the latest information, see the [documentation](#).

What can the inline suggestions help with?

- Delay email delivery
- Suggested outstanding tasks
- Get more time to focus
- Plan your time away
- Protect your focus time
- Shorten a meeting
- Track email open rate
- Track email

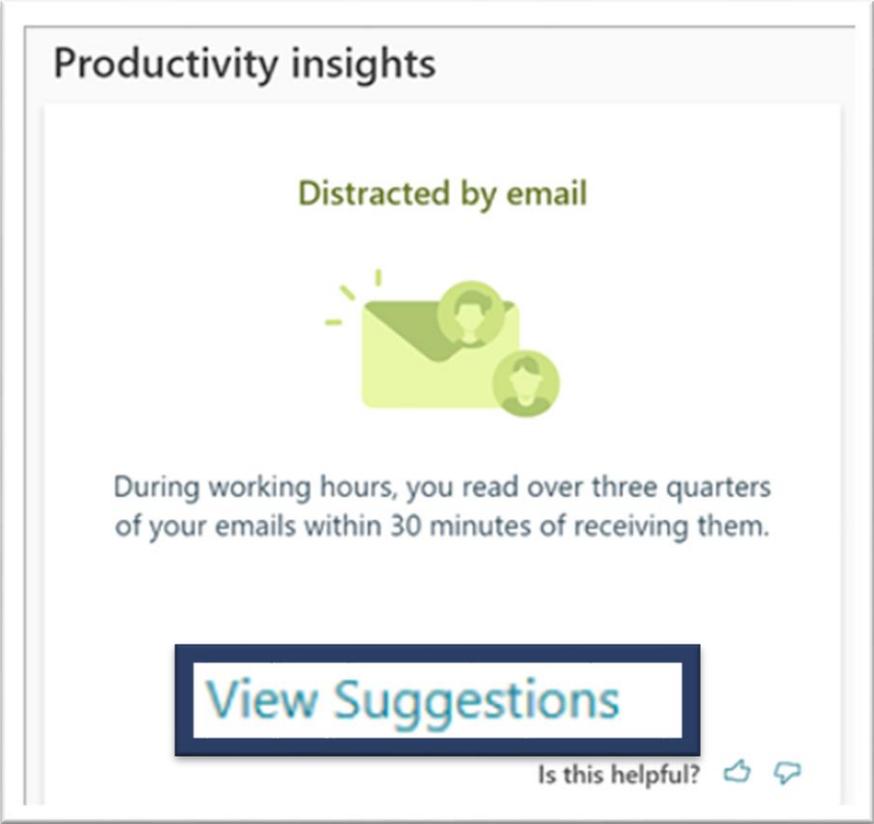
Show up in Outlook when reading or composing email or meeting invitations



Productivity insights with MyAnalytics

Note: Product features are subject to change. For the latest information, see the [documentation](#).

1 View productivity insights in the MyAnalytics dashboard



Productivity insights

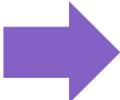
Distracted by email



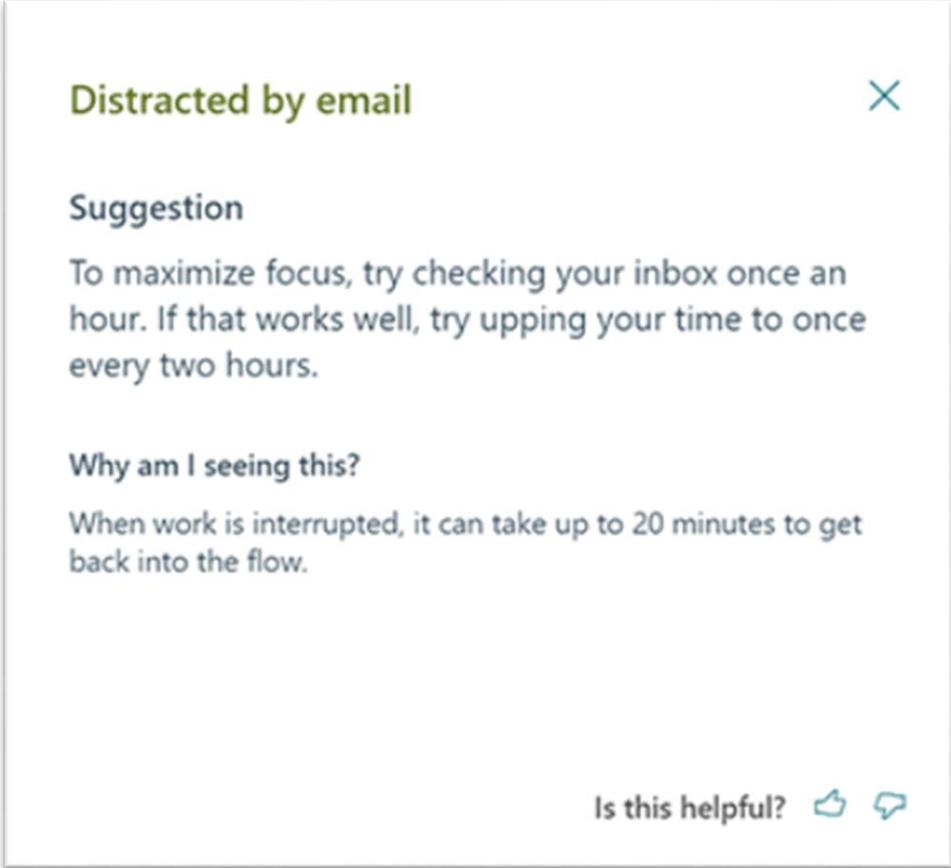
During working hours, you read over three quarters of your emails within 30 minutes of receiving them.

View Suggestions

Is this helpful?  



2 Select View Suggestions for an educational tip



Distracted by email 

Suggestion

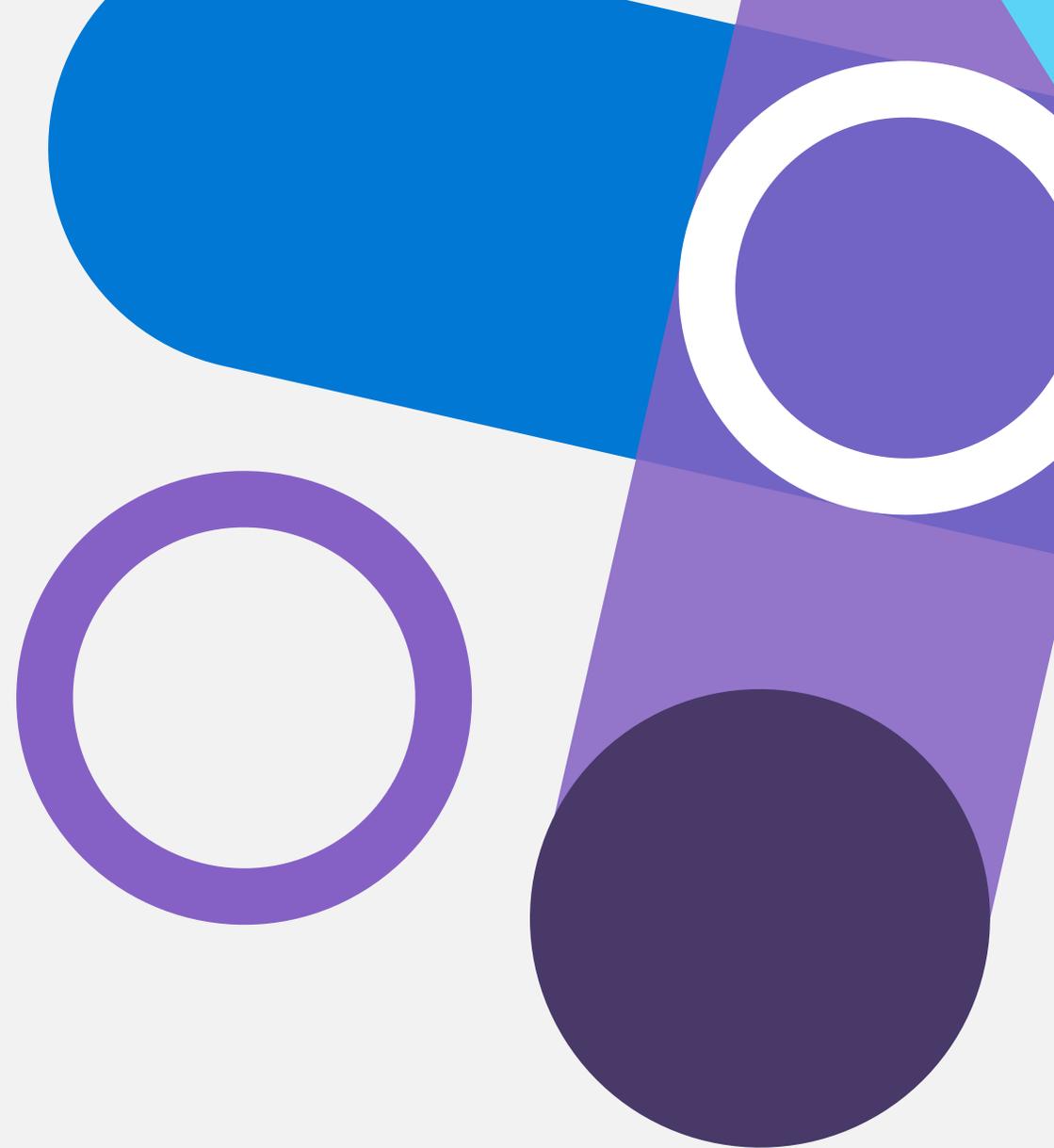
To maximize focus, try checking your inbox once an hour. If that works well, try upping your time to once every two hours.

Why am I seeing this?

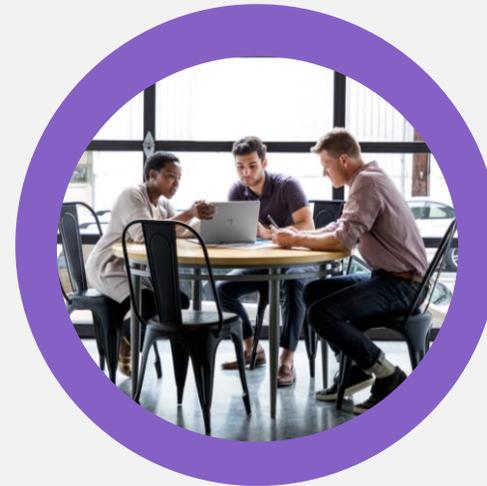
When work is interrupted, it can take up to 20 minutes to get back into the flow.

Is this helpful?  

Appendix: Co-create solutions



**Identify team
priorities and act with
Manager insights**



Manager experience: Steps from insights to action

1

Review insights

- Review your manager insights
- Select 1 to 3 areas that you would like to improve
- Set a goal

2

Choose change tactics

- Review and select change tactics
- Add additional actions you and your team can take

3

Take action

- Share in your next team meeting and collaborate with your team to improve
- Set a checkpoint to revisit progress

Example:

Long and large meetings

Insight

70%

of your team spends a majority of their meeting time in long or large meetings.



What can you do?

Suggested Interventions

- Support shortening meetings and inviting fewer people
- Reduce duration and attendees with a meeting attendance checklist
- Empower employees to decide if they attend

Share and track progress

Actions

- Schedule recurring manager-team discussions to define opportunities and steps to take
- Check in regularly with the team to track progress to team goals

Promote employee **wellbeing** with Manager insights

Manager insights help managers identify opportunities to reclaim time and find opportunities to help employees protect their time by establishing cultural norms that reduce excess collaboration and burnout risk.



Opportunities

- 1** *Long and large meetings*
Understand how long and large meetings contribute to collaboration overload, and how you can establish new norms to increase wellbeing.
- 2** *Time in email*
Learn how email can negatively impact wellbeing, and how you can reduce time spent in after hours emails and the stress it can cause.
- 3** *After-hours work*
Understand how time spent in after-hours puts your team at risk for burnout and how you can help your team to achieve work-life balance.

Wellbeing: Review meeting culture insights

Does your team have long and large meetings?

Why it matters:

Meeting attendees tend to communicate faster, get more work done, and come to decisions more quickly in shorter meetings that have fewer people.

Supporting evidence

Understand how long and large meetings factor into wellbeing. Use the supporting evidence to learn more.

See [Best practices for meetings](#) for more ideas.

Long or large meetings

70%

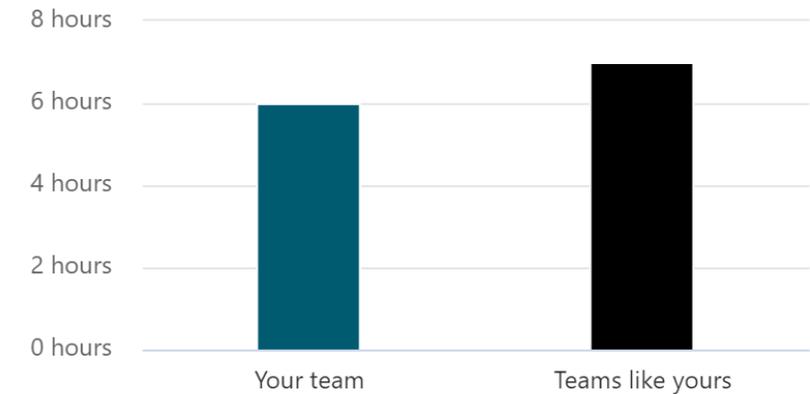
of your team spends a majority of their meeting time in long or large meetings.



How we define long or large meetings ⓘ

Identify the percentage of your team that spends over half their meetings in long and large meetings.

Average weekly meeting hours



How we identify teams like yours ⓘ

Encourage your team to plan shorter meetings with focused agendas and fewer people.

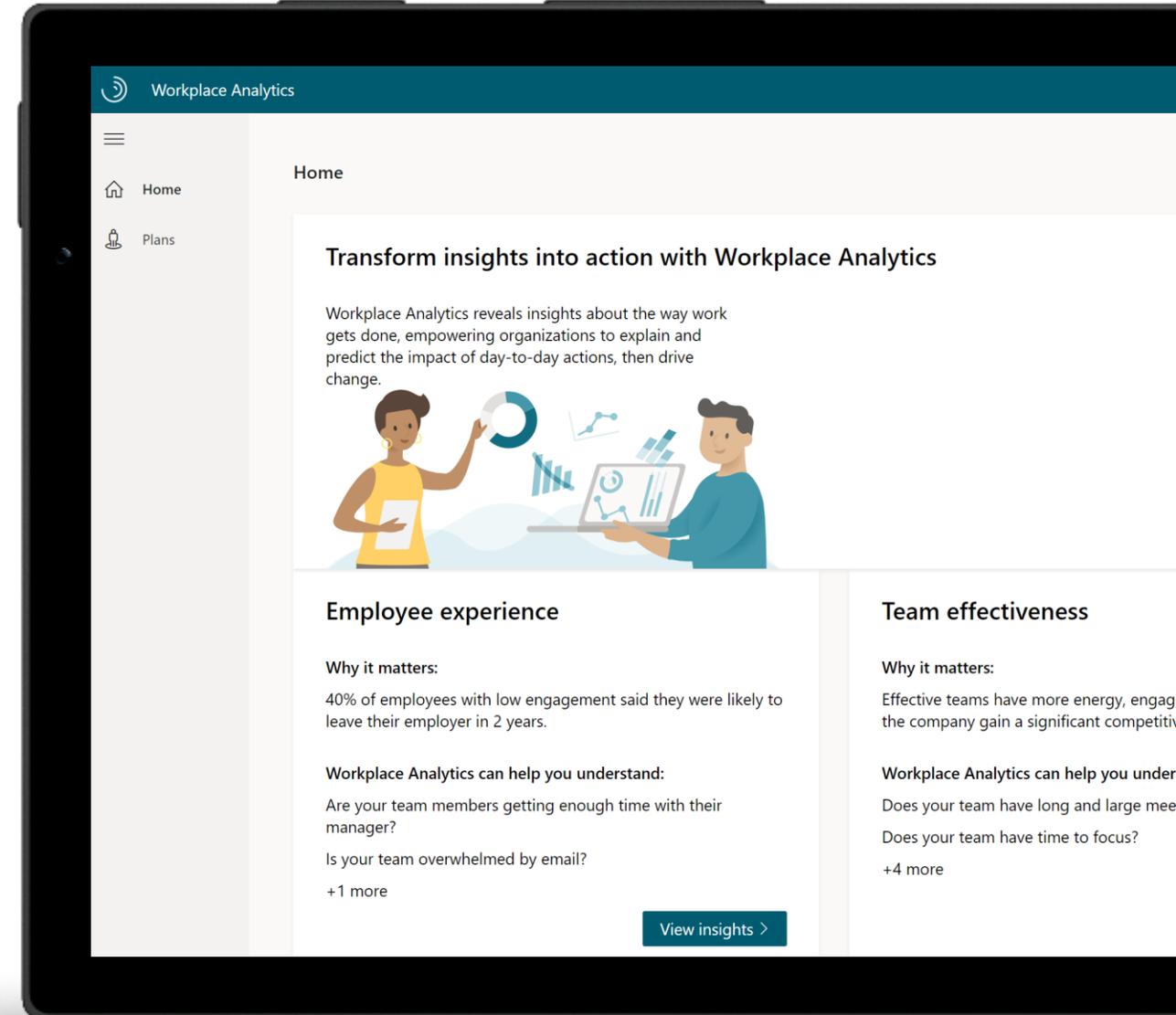
Compare average weekly meeting hours between your team and teams like yours who also report to your manager.



Exercise: Review Manager insights and choose tactics

1 Review Manager insights in Workplace Analytics

- Employee experience
- Team effectiveness



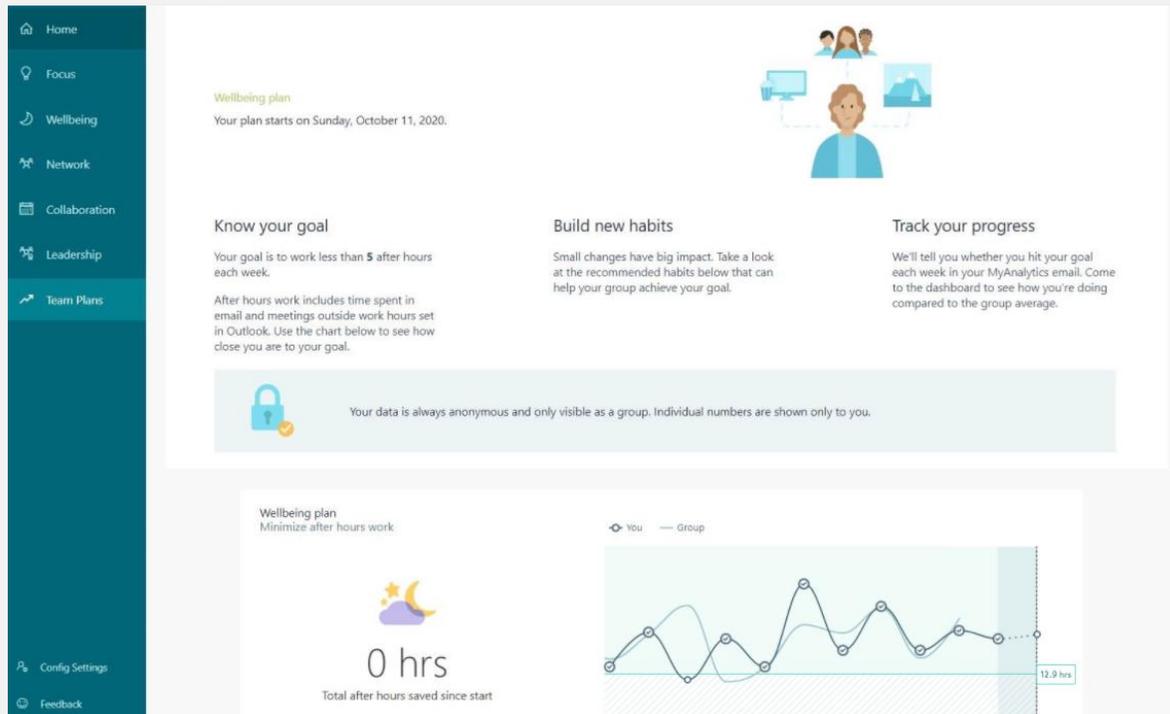
Plans overview

Focus: Participants in this plan will be encouraged to adopt work and collaboration habits that help boost innovation.

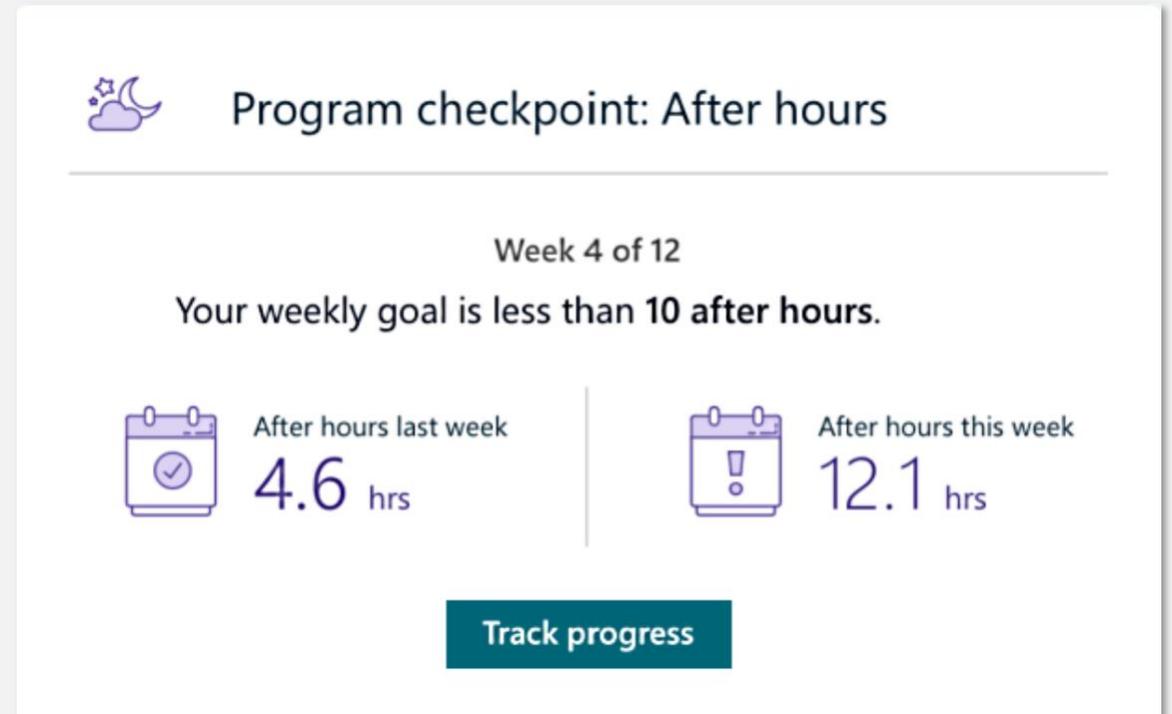
Collaboration: Participants in this plan will learn habits to optimize their schedules and make the most of collaboration time.

Wellbeing: Participants in this plan will learn tactics for achieving and maintaining an optimal work-life balance.

MyAnalytics dashboard



Weekly email digests





Change tactics

Delete boxes that are not relevant. The remaining boxes make up your action plan.

What can you do as a manager?

Limited one-on-one time

Schedule a recurring 1:1 invite with all your direct reports (at least 30min twice a month)

If you must miss a 1:1 reschedule don't cancel

Leverage online training resources on how to be on manager coaching

After-hours work

Start a Workplace Analytics Wellbeing plan

Review project allocation to ensure that commitments are not impacting wellbeing

Ensure that recurring meetings with cross-geography teams rotate time zones

High email workload

Set expectations on how often you will check your email and share your intention with your team

Review decision making processes so employees don't need to reach out for email follow ups

Set an example by removing yourself and others from unnecessary email threads

What can you encourage your team to do?

Co-create a conversation topics to make the next 1:1 meetings more effective

Share regular feedback on what is working well and what aspects of coaching can be improved

Delay emails sent after colleagues work hours

Define your working hours and share them with others including in your email signature

When replying to emails reduce the use of reply all and remove unnecessary participants

Use IMs to send chat-based communication that might work better on Microsoft Teams

Any additional ideas that are not listed above?

""

""

""

""

""

""



Change tactics

Delete boxes that are not relevant. The remaining boxes make up your action plan.

What can you do as a manager?

Limited one-on-one time

Enable a Workplace Analytics Collaboration Plan

Establish a bi-weekly meeting free day

Audit the current largest recurring meetings

Limited focus time

Enable a Workplace Analytics Focus Plan

Cancel recurring meetings and if necessary, reschedule with a smaller set of attendees

If a meeting doesn't seem necessary request that the meeting be canceled and resolved via Teams

Low instant message use

Send team members relevant Teams online training resources

Each week give a team member kudos for a job well done on your Teams channel

When receiving an email respond via Teams to establish new habits

What can you encourage your team to do?

Prepare agendas that assign roles and provide context for which participants are required

Decline unnecessary meeting invites

Leverage and don't remove the Workplace Analytics automatic booking of focus time

Record meetings and share notes so others can keep their focus time and catch up later

Take communication that you usually send by email and move it to teams

Set a goal to communicate to communicate with at least three contacts via Teams per week

Any additional ideas that are not listed above?

""

""

""

""

""

""



Change tactics

Delete boxes that are not relevant. The remaining boxes make up your action plan.

What can you do as a manager?

Few cross-team connections

Introduce managers to others in your network that have similar areas of interest

Create a contact checklist for new managers to reach out to as onboarding after a promotion

Create a mentorship program and assign matches beyond silos

Low cross-company collaboration

Create a cross-functional Teams channel for collaboration

Set up virtual sessions to share expertise across communities of practice

Invite guest speakers to your team calls

What can you encourage your team to do?

Use Teams to reach out to one new colleague per month

Use MyAnalytics to keep track of those who you are connecting with or losing touch with

Become an interdepartmental liaison

Use MyAnalytics to keep track of those who you are connecting with or losing touch with

Any additional ideas that are not listed above?

""

""

""

""

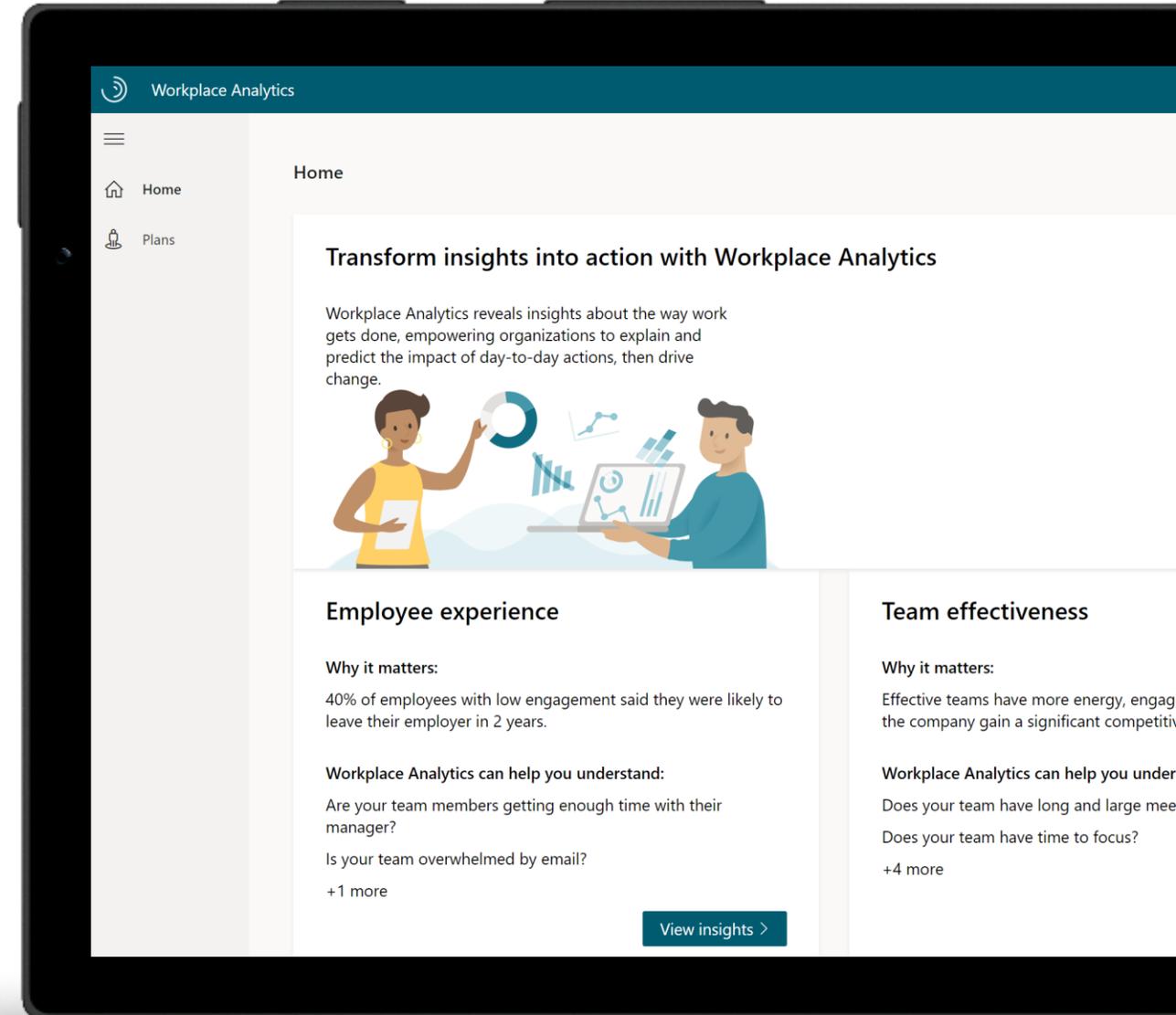


Exercise: Review Manager insights and choose tactics

2 Choose change tactics



Using the change tactics resources pages, choose your tactics and delete those that are not relevant. The remaining boxes make up your action plan.



Manager roll up of findings, goals, and next steps



Opportunity areas 

...

...

...

Baselines 

- ...

- ...

- ...

What steps can you take as a manager? 

- ...

- ...

- ...

What steps can you take as a team? 

- ...

- ...

- ...

Metric-based goals? 

- ...

- ...

- ...

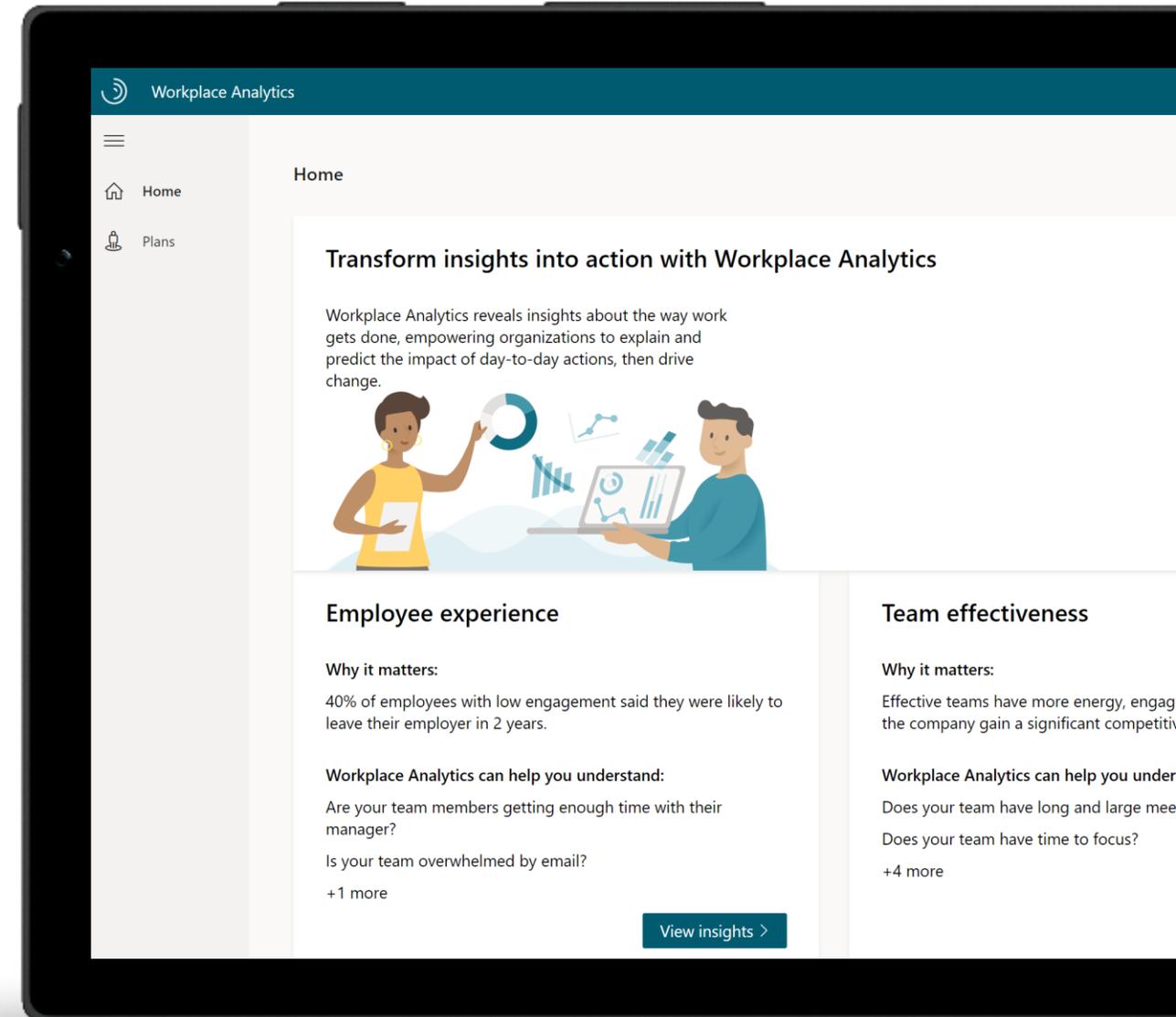


Exercise: Review Manager insights and choose tactics

3 Finalize action plan



Use the Manager roll-up slide to define your goal and complete a summary of your action plan



Next steps

Learn about existing best practices

i See [Best practices](#) for more details

Communicate your findings in your next team meeting

Share actions from your perspective

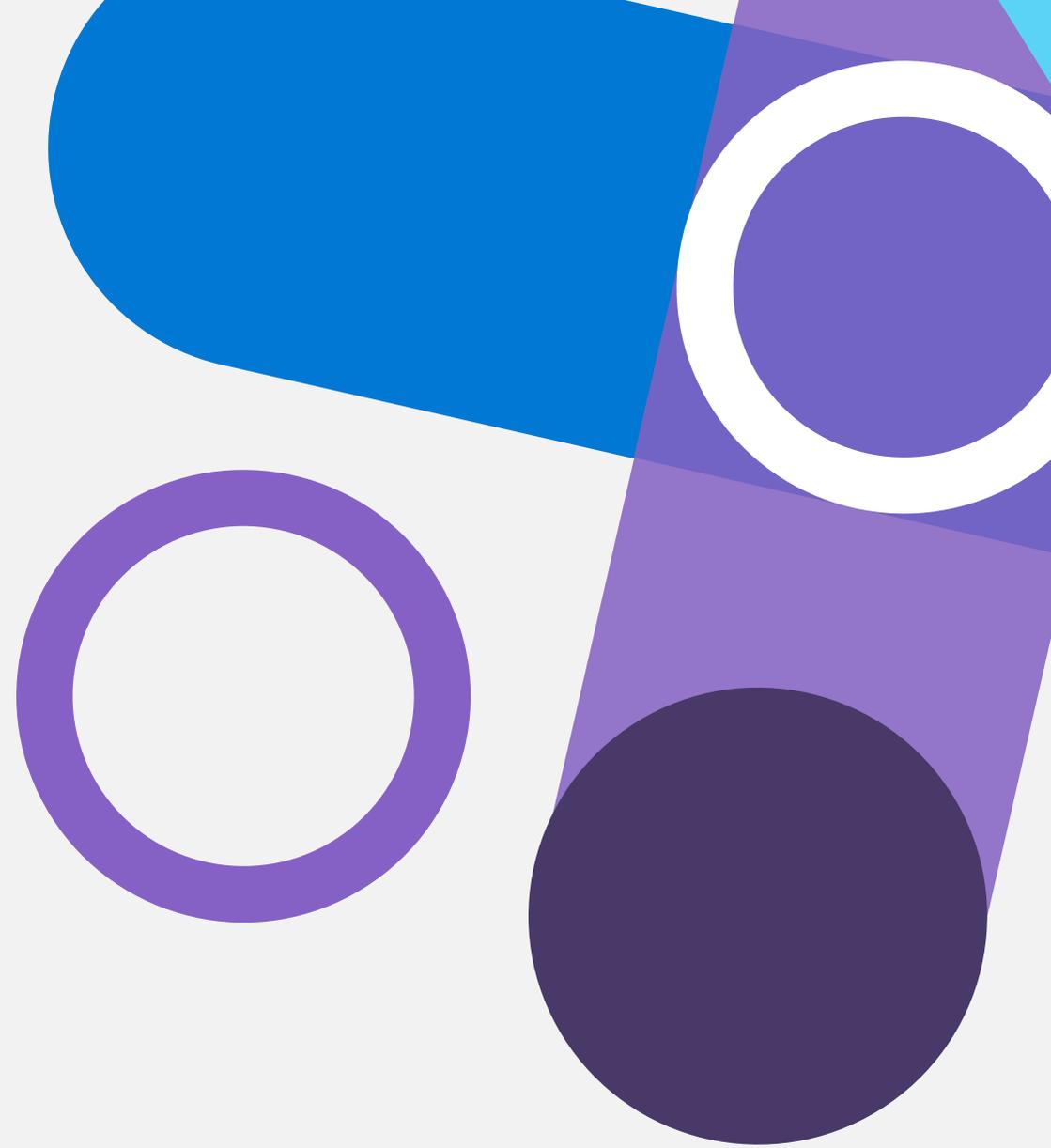
Discuss actions from your team's perspective

i Use the following [discussion guide](#)

Reinforce with a recurring cadence to revisit progress and discuss with your team



Manager-team discussion guide





Questions to consider for each of the findings



What are our biggest opportunities?



What steps can we take as a team?



What steps can I take as a manager?

Opportunity 1: Long and large meetings

Manager insights finding

Does your team have long and large meetings?

Why it matters:

Meeting attendees tend to communicate faster, get more work done, and come to decisions more quickly in shorter meetings that have fewer people.

Supporting evidence

Long or large meetings

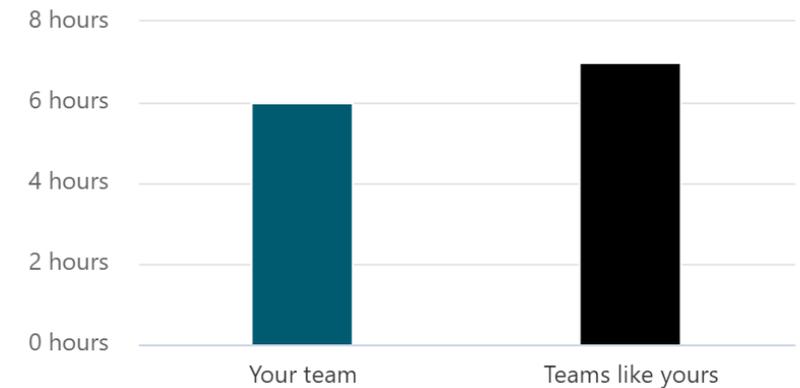
70%

of your team spends a majority of their meeting time in long or large meetings.



How we define long or large meetings 

Average weekly meeting hours



How we identify teams like yours 

Encourage your team to plan shorter meetings with focused agendas and fewer people.

Set goals for long and large meetings

Finding



Does your team have long and large meetings?

Why it matters:
Meeting attendees tend to communicate faster, get more work done, and come to decisions more quickly in shorter meetings that have fewer people.

Supporting evidence

Long or large meetings

70%

of your team spends a majority of their meeting time in long or large meetings.



How we define long or large meetings ⓘ

Average weekly meeting hours



How we identify teams like yours ⓘ

Encourage your team to plan shorter meetings with focused agendas and fewer people.

Goal



Reduce long or large meetings by 10% to 60% by next quarter

What steps can we take as a team?



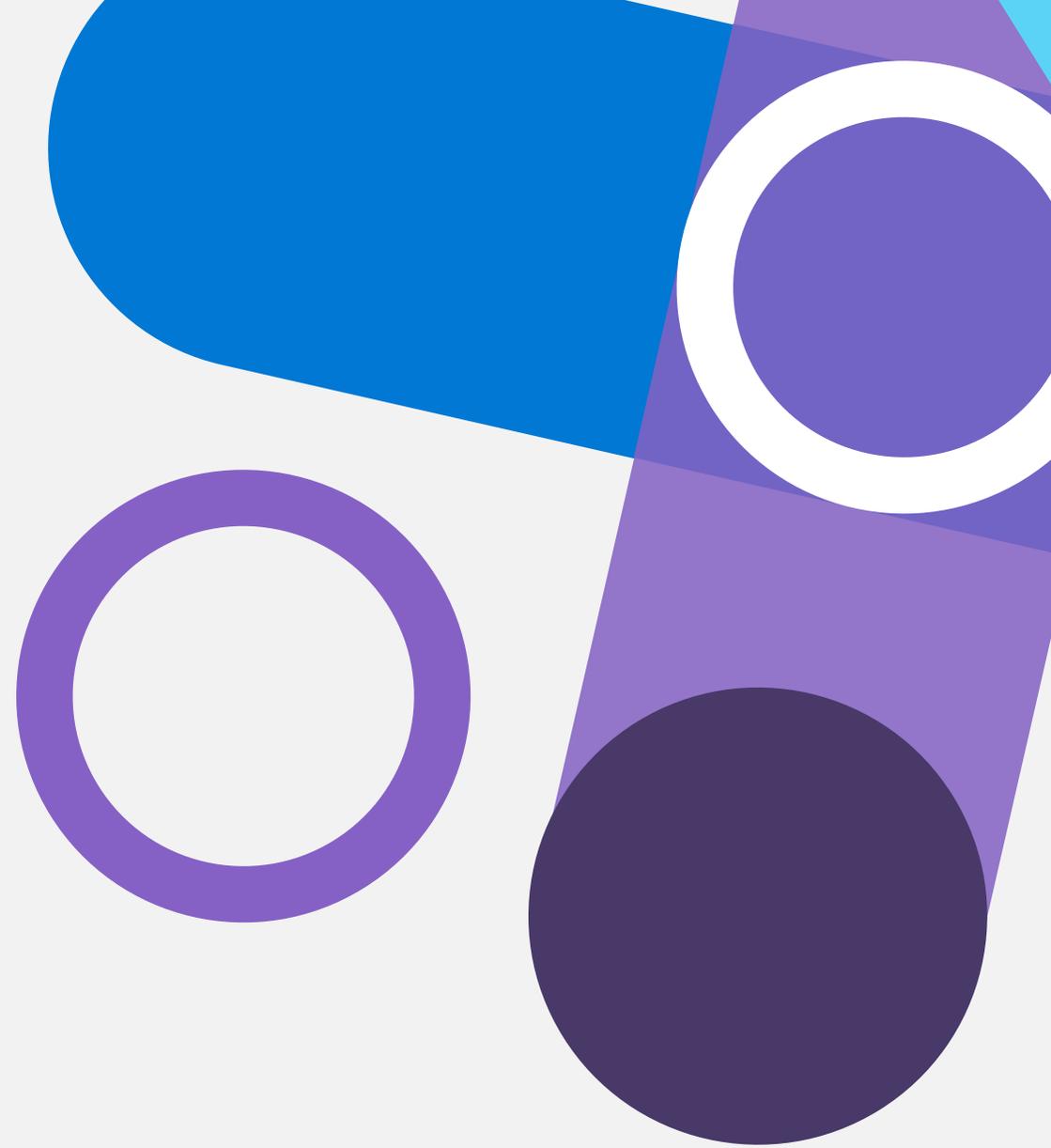
- Send agendas prior to any meeting
- Decline unnecessary invites

What steps can I take as a manager?



- Enable collaboration plan
- Establish a bi-weekly meeting free day
- Audit the current largest recurring meetings

Champion co-creation guide



Adjust and customize

It is recommended that you incorporate your own analysis, training materials, or custom content prior to using this template

This is an example template and by no means intended to be the only way to run a workshop

Remote Workshop setup

Prior to the workshop

- Use the attendee roster to divide participants equally among groups.
- Host the participant activity guides in a shared location so participants can co-author. Create one copy for each group.
- Create a Microsoft Teams meeting link for each of the groups.
- Familiarize yourself with the agenda and timing so you can keep things on track on training day.
- Assign the Microsoft Learn module [Driving organizational change with Workplace Analytics and MyAnalytics Module](#) to participants as pre-work.

Tips

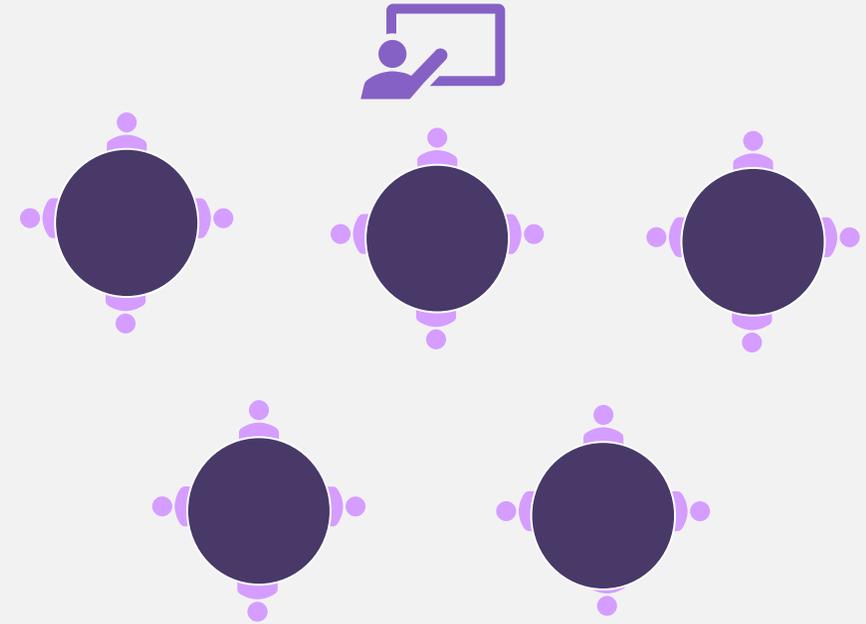
- Be mindful of the timing. Send reminders to each group when there is five minutes remaining in the activity to push groups forward if they are spending too much time on one part of the activity.
- Post the links to each breakout group in the IM before breaking out into the activity groups.
- Each time you breakout for an activity state the slide numbers for the activity guide that the participants will fill out.

In-person workshop setup

Room setup

The room where the workshop takes place should contain:

- A projector or method to present content
- Wi-Fi
- Whiteboards, flipcharts, markers, and post-it notes
- An interactive group layout



Tip: The facilitator will be key in driving engagement by floating around during activities



Today's context

Scenario

[Scenario description]

[What are the key metrics that you are trying to improve on?]

[Why is this important to the organization?]

[Why is this important to those attending this workshop?]

Add additional analysis slides to set context for the day when available



[Example]

Improve our meeting culture to focus on the work that matters most

At Contoso we are committed to promoting an inclusive culture that enables our employees to perform at their best. As a part of our *Work that matters* initiative, we would like your help in improving our culture with the following goals:

- Free up time spent in low-quality meetings
- Ensure that your time is spent in ways that enable you to focus on the work that matters most

Provide an overview of Viva Insights

Refer to the “Taking Insights to Action Playbook” to build slides that provide an overview of relevant features. This section might include an overview of the following:

- Workplace Analytics
- Manager insights
- MyAnalytics
- Plans
- Insights Outlook add-In
- Inline suggestions
- MyAnalytics productivity insights

Breakout 1: Enable Viva tools



1

Consider which features would be most helpful in driving change



2

Decide what features you will go back and communicate with your team

Stuck? Consider the following:

- Workplace Analytics Plans
- Insights for People Managers
- MyAnalytics

Need more information:

Use the documentation links

[Your scenario]

What features will you go back and communicate with your team?

- X

Need help:

- [MyAnalytics Elements](#)
 - [Dashboard](#)
 - [Insights add-in](#)
- [Workplace Analytics plans](#)



Design custom tactics

The new Viva tools can be helpful but would like to do more. Let's determine what **additional tactics** or interventions we can execute to increase the likelihood of behavior change.

Breakout 2: Propose change tactics



Target behaviors

1

List new behaviors that champions can role model

Prioritize one



Change tactics

2

Identify change tactics that can help drive behavior change

Prioritize one

Stuck? Consider the following:

- What do employees need to do differently?
- What are the best practices?

Need more information:
[Workplace Analytics best practices](#)



Example: Identify the target behavior



Activity description

1. Create a **list of behaviors** that people can start or stop doing to address the root cause
2. Identify the **level of impact** that the new behavior would have on addressing the root cause
3. Identify the **likelihood** that employees would adopt the new behavior
4. Prioritize one **target behavior**

Root cause:

Minimal or no context is provided prior to the meeting

Target behavior

Identify a specific behavior to start doing

Impact

Likelihood of adopting the new behavior

Start sending meeting agendas

High

High

Start marking attendees as optional

Medium

Medium

Start assigning roles to meeting attendees

Medium

Low



Example: Define change tactics



Activity description

1. Generate a list of interventions to drive the new **target behavior**
2. Prioritize one to three **change tactics**

Example target behavior:
Start sending meeting agendas

Change tactic examples

Establish a new social norm

Have champions send and encourage meeting agendas for all meetings

Make it easy

Provide an example template and promote the use of a consistent structure to reduce cognitive burden of creating from scratch.

Provide an example of success

Conduct a pilot and leverage data to show the impact on number of attendees in meetings

1 Define what you would like people to start doing differently

Consider:
Create an exhaustive list of possible behaviors prior to prioritizing

Root cause: One on one's are not perceived as valuable

Target behavior

Identify a specific behavior to start or stop doing

Impact

Likelihood of adopting the new behavior

X

(Low, medium, or high)

(Low, medium, or high)

Y

(Low, medium, or high)

(Low, medium, or high)

2 Define your change tactics

Target behavior: [Insert your target behavior]

Potential interventions

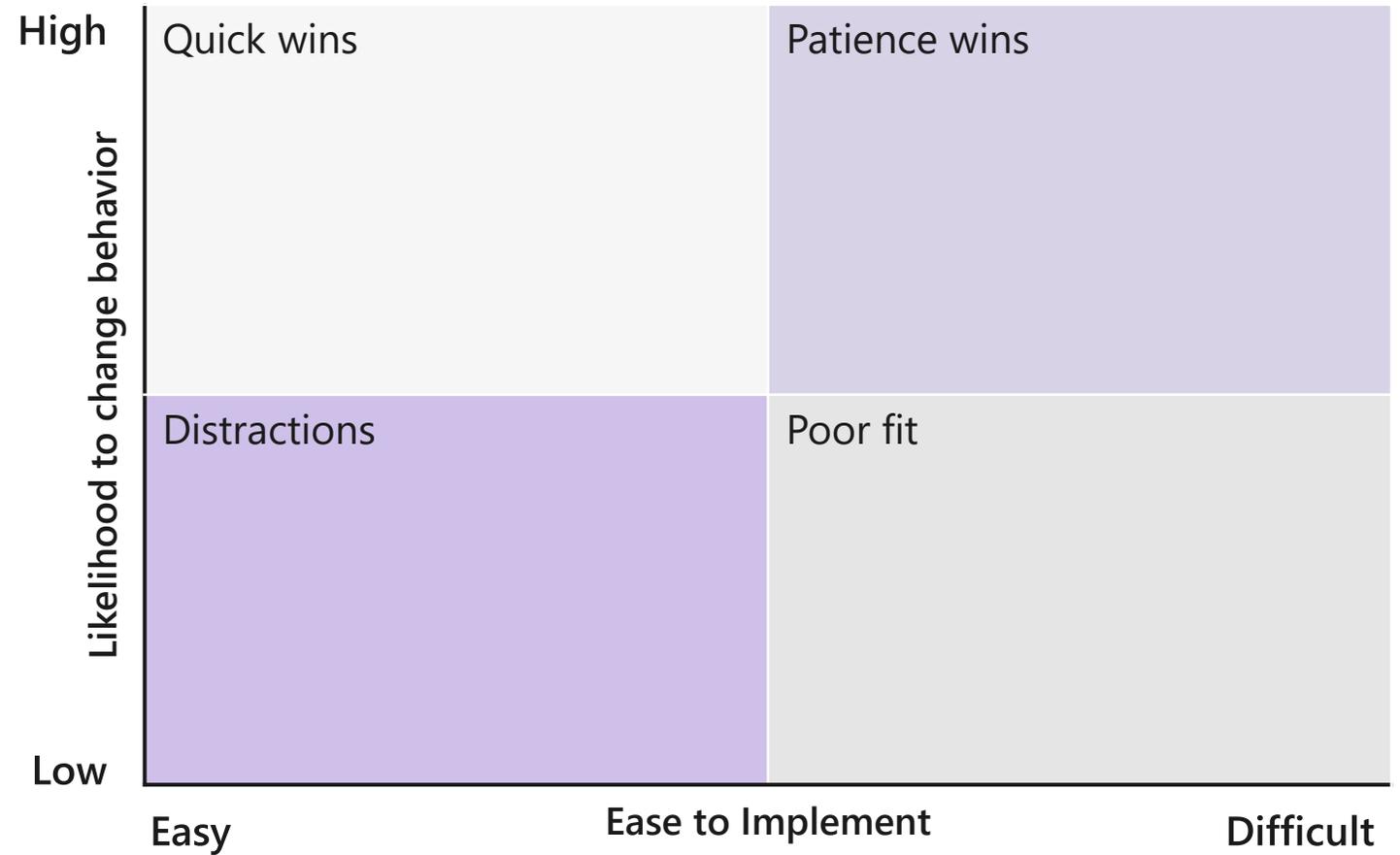
1. X
2. X
3. X

2 Prioritize change tactics

Place brainstormed interventions in the correct quadrant. To plot behaviors, answer the following questions:

1 How likely is it that the intervention will be effective at changing behavior?

2 How easy is it to implement?





Take action and measure

We can now summarize our action plan. Our next steps include:

- Behaviors that we can role model
- Viva features that we can encourage our team to use
- Change tactics that the change team will help implement
- Measurement of results
- Sharing of successes

Insert your timeline, next steps, and summary

Your next steps might vary. Include any additional next steps that you would like to share.

Champion roll-up of findings, goals, and next steps

1 Review insights

Opportunity areas



...

Baselines



• ...

...

• ...

...

• ...

2 Choose change tactics

What actions can I
role model as a
champion?



• ...

• ...

• ...

What additional
change tactics will
we implement?



• ...

• ...

• ...

3 Take action

(Next Month)
Find 1 success to
share



• ...

• ...

• ...