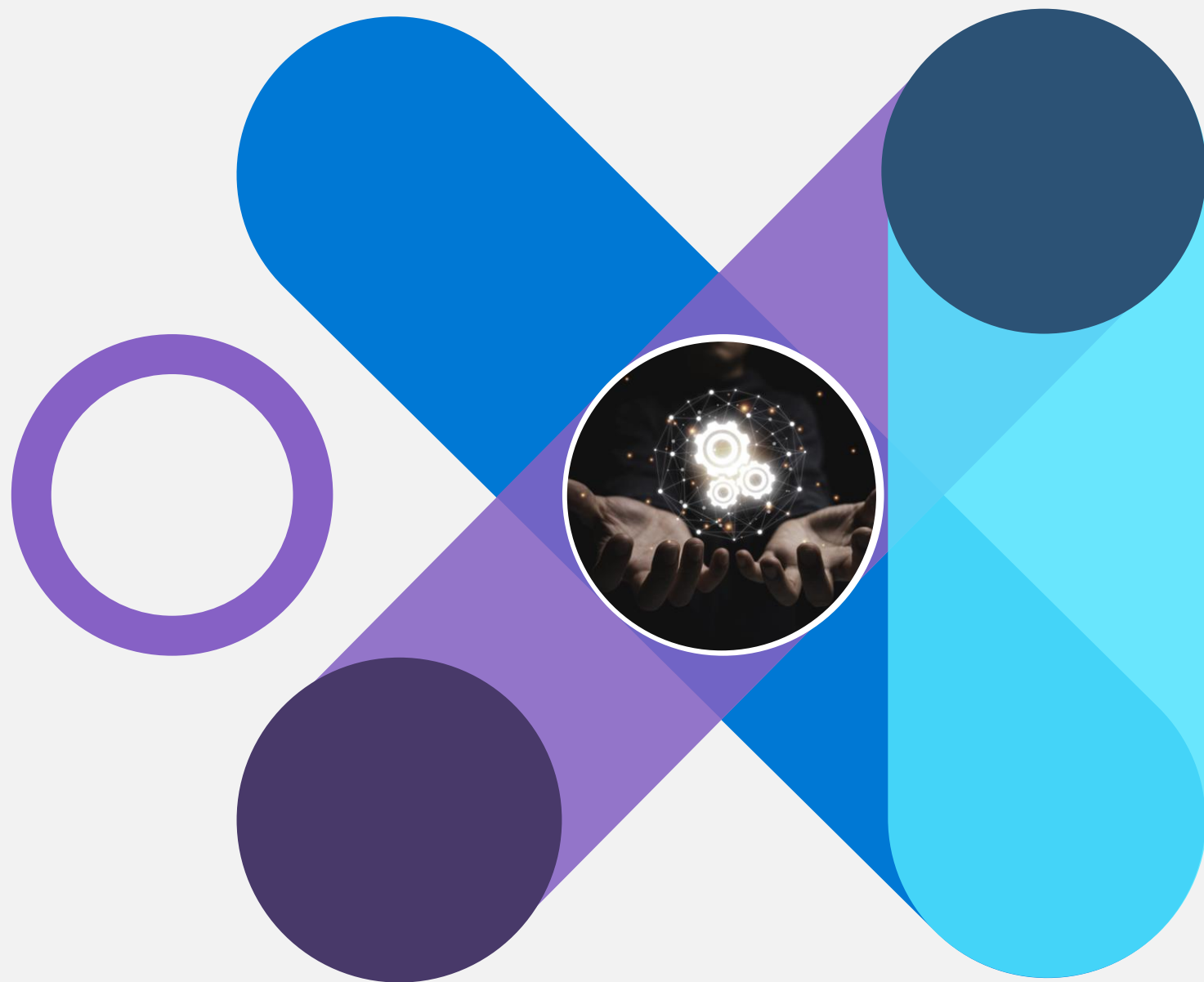




Operational Effectiveness Playbook

Use cases for Workplace Analytics

April 2021



Operational Effectiveness Playbook goals and audience

Playbook goal



This playbook introduces operational effectiveness practitioners to how they can use Workplace Analytics to uniquely inform and measure day-to-day operations within an organization. This playbook gives you a robust understanding of how you can use Workplace Analytics and demonstrates the art of what's possible, including:

- *An Operational effectiveness framework* and supporting evidence from academic research
- *Sample analyses* by framework topic and why they matter
- *Operational effectiveness analytic project guidelines*
- Starter pack for *actionability and operationalization*

This playbook is NOT a Workplace Analytics tutorial or a how-to analysis guide. For an introductory tutorial, see [Discover Microsoft Workplace Analytics](#).

Target audience



The target audience for this playbook includes *analysts* who are analyzing and tracking the state of operational effectiveness within the organization and *operations practitioners* who are seeking measures for driving more efficient organizational collaboration. The audience includes roles such as:

- Operations program managers
- Operations business analysts
- Operations consultants

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- How to measure operational effectiveness with Workplace Analytics
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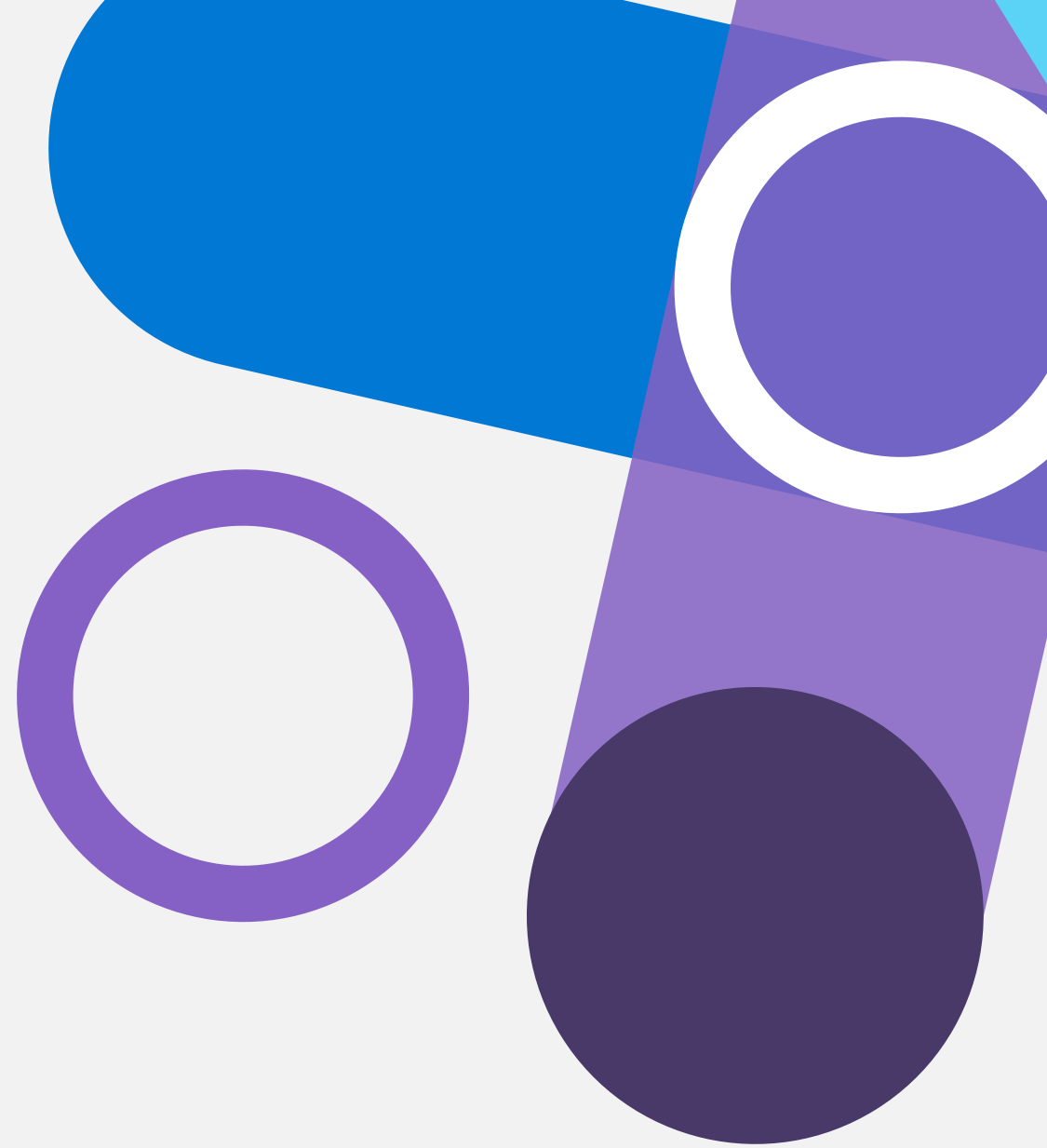
Take action

- Create accountability for change
- Starter pack of action levers

Introduction

"Until we can manage time, we can manage nothing else."

– Peter Drucker



Employees are your most valuable asset – As an operational leader, investing their time wisely is critical for driving unit productivity

Operational effectiveness

- Which projects consume the **most time and resources**?
- Do you have the **right people on the right projects** and processes?
- Who do your teams need to collaborate with to deliver successful outcomes?
- Where can you **reduce the time required** or improve results?

Workplace Analytics can identify labor unit productivity gains, and...

- Analyze collaboration metadata to **learn where time and resources are invested**
- Learn where you have **opportunities to streamline**
- Determine **which processes need to change** their approach, timing, and staffing model



...help you drive better business outcomes

- ✓ Time to market
- ✓ Product quality
- ✓ Customer satisfaction
- ✓ Employee engagement

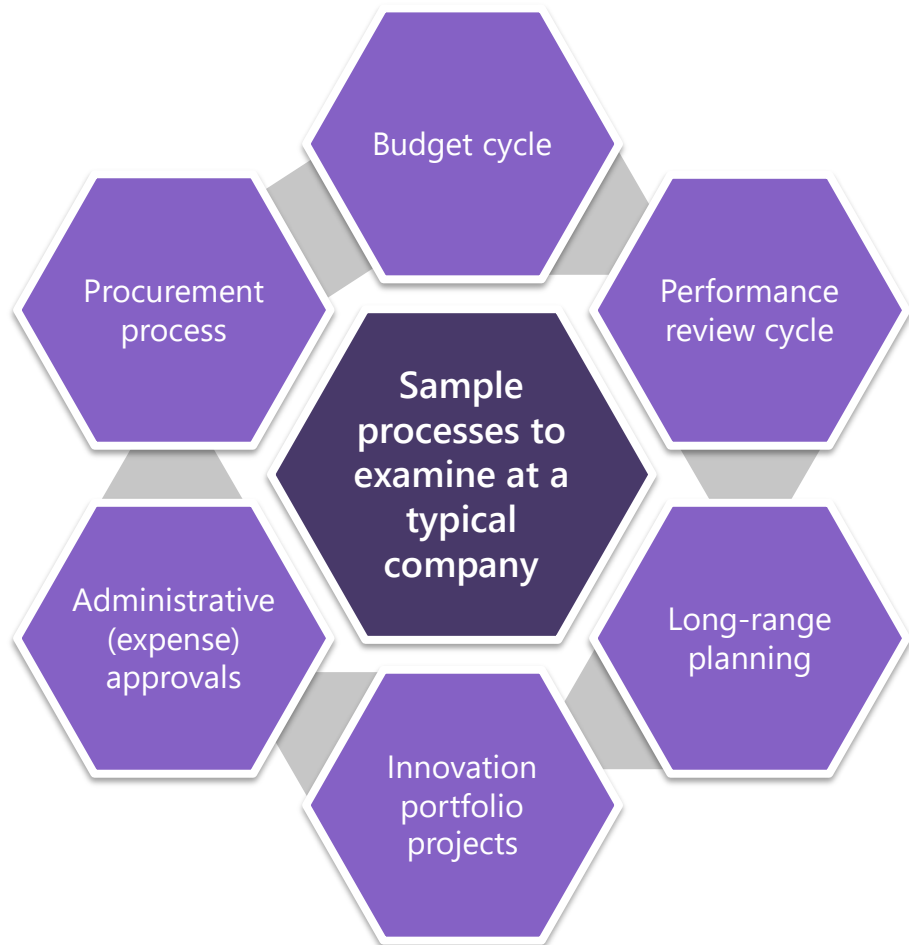


[How People Analytics Can Help You Change Process, Culture, and Strategy](#)



[Quantify How Much Time Your Company Wastes](#)

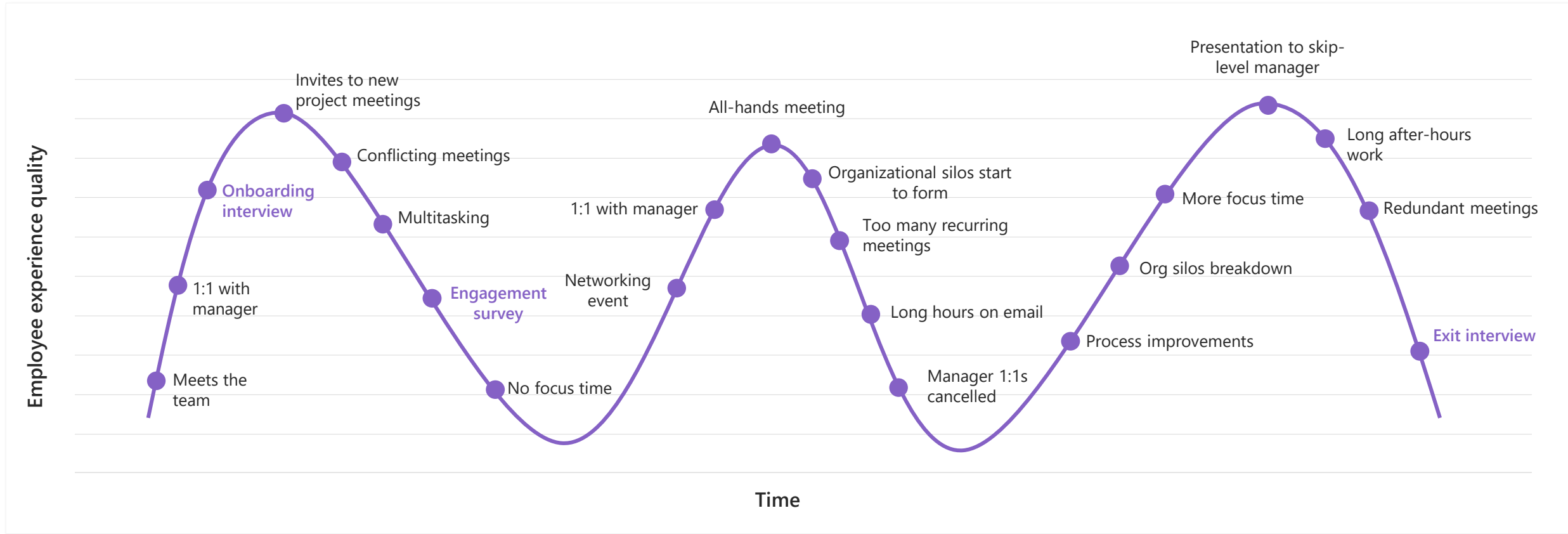
Use Workplace Analytics to identify labor unit productivity gains across a wide set of processes and industries



How have companies used Workplace Analytics to improve their processes and Rhythm of Business activities?

- A financial services company used Workplace Analytics to reduce the collaboration cost of their long-range planning cycle
- A global beverage company removed a bottleneck in their process by staggering the peak activity periods of two of their main processes
- A multinational energy company reduced process time dedicated to rhythm of business activities across operations
- A digital services firm transformed their sales teams to better focus their attention on customer interactions and deal flow activities

Workplace Analytics reveals what you could not see before



Passively gathered, objective, end-to-end employee lifecycle data provides the opportunity to measure and improve workplace inclusiveness

How does it work?



Native Microsoft 365 data

Start with aggregated behavioral data from everyday work in collaboration tools



Control & governance

Flexible privacy and compliance controls help you protect your data



Business context

Overlay of organizational descriptors and business outcomes reveal patterns of success



Insights & change

Use specific insights to make better business decisions and transform your organization

Framework





How to use this playbook

Aligning common scenarios to the modules

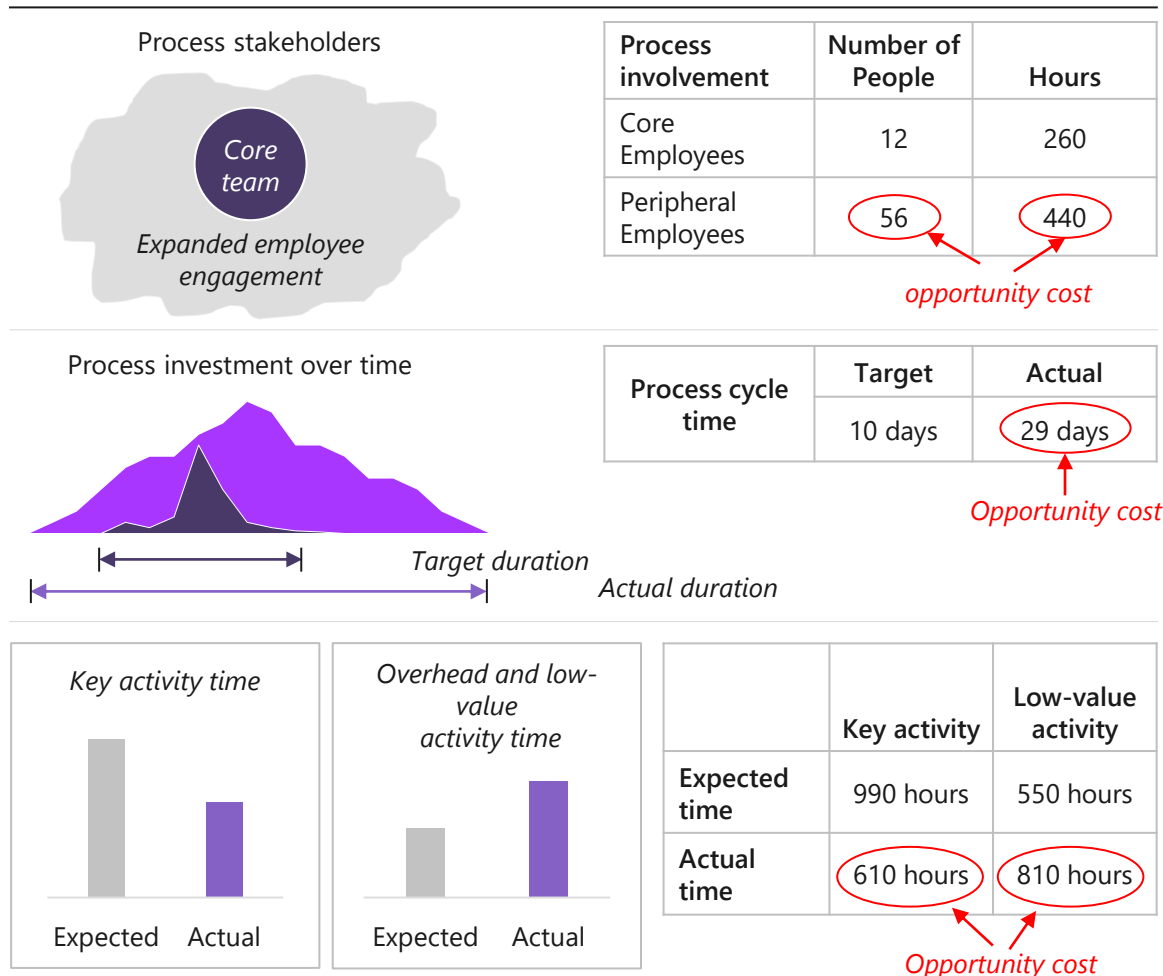
Common business challenges

Lack of role clarity

Process waste

Poor time management

How can Workplace Analytics help you demonstrate it?

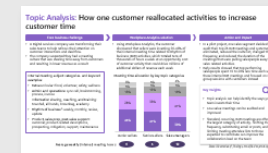


Playbook section

Process analysis



Topic analysis



Considerations

- There is a **specific process** in mind that leadership wants to improve, such as stakeholder involvement and process cycle time.
- The process is both specific and relevant enough to be able to be captured through collaboration activities.
- No specific process in mind.
- Open to **explore areas** of unknown time burdens to groups that may be taking away from otherwise important business activities.

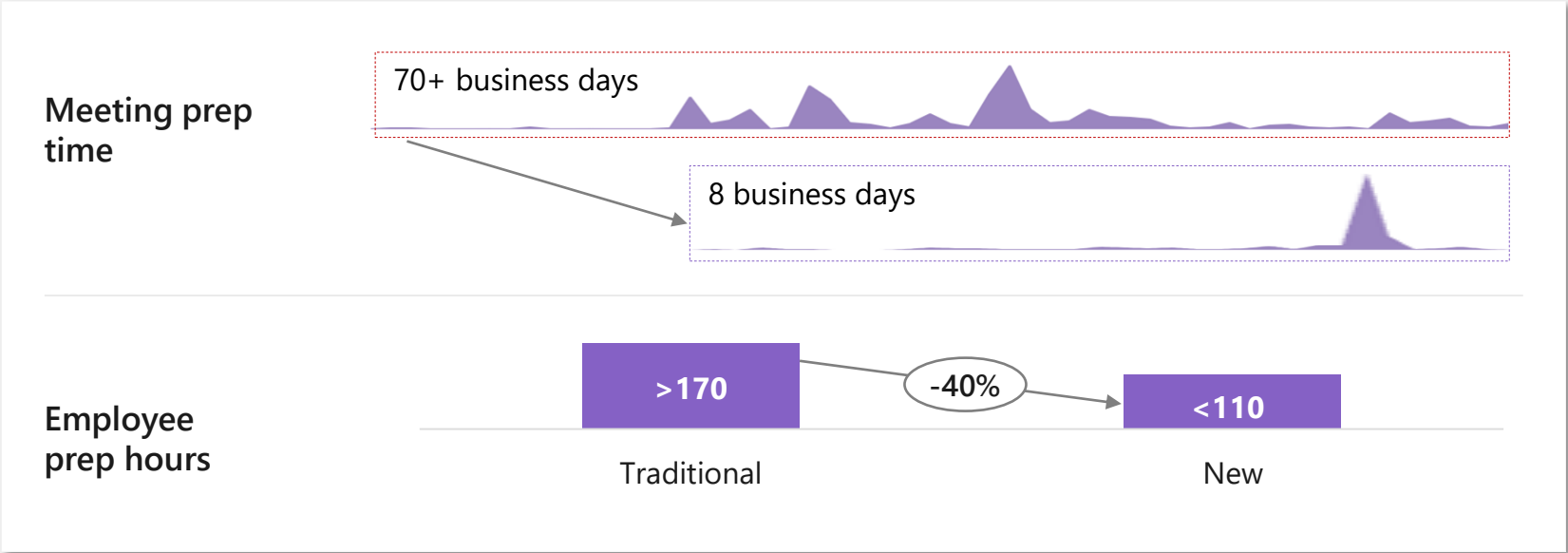


What's required?

Module	Data requirements	Resource requirements	Risks
Process analysis	<ul style="list-style-type: none">• Process related keywords (QBR, budget planning, LRP, and Process X)• Organizational, group, or team classifications	<ul style="list-style-type: none">• Subject matter expert context on the process (start and end dates, workflow, key roles, and so on)• Analyst support to refine the training data set	<ul style="list-style-type: none">• Relatively low volume processes have lower improvement opportunity• Important to capture true start and end dates
Topic analysis	<ul style="list-style-type: none">• Topic categories (Rhythm of business, Contracting, Strategic planning, or Contracting)• Topic related keywords (Monthly all hands, Contract war room, or daily huddle)	<ul style="list-style-type: none">• Subject matter expert context on the process (start and end dates, workflow, key roles, and so on)• Analyst support to refine the training dataset	<ul style="list-style-type: none">• Spending time up front to categorize topics is critical• Many categories will have a mix of high-value and low-value activities (Rhythm of business)

Process analysis: Reclaim thousands of process hours at a global oil and gas company with Workplace Analytics

Core business challenge	Workplace Analytics solution	Action and impact
<ul style="list-style-type: none">A large global energy company wanted to:<ul style="list-style-type: none">Reduce process time dedicated to rhythm of business activities across operationsUnderstand and monitor meeting spill over time impacts and examining meeting prep time	<ul style="list-style-type: none">Analysis revealed each monthly session took more than 170 person hours, spread over 70+ daysDeeper analysis found a root cause of multiple handoffs due to lack of sub-process ownershipTracking dashboard enabled the CFO and cross-functional team to monitor the going forward hours impact	<ul style="list-style-type: none">CFO and team drove reduction of 40% in prep hours and 85%+ in process daysEquated to hundreds of thousands of dollars in annual savingsSparked broader enterprise-wide scaling of Workplace Analytics to streamline operations



Key Insights

- Initiated by analysis in Workplace Analytics, and using it to track and measure; the team consolidated meeting prep activity from 70+ days to 8 days
- Total employee hours dedicated to prep fell sharply, enabling the company to repurpose hundreds of thousands of dollars in employee work time toward more additive contributions

Data illustrative of findings, modified to protect privacy

Topic Analysis: How one customer reallocated activities to increase customer time

Core business challenge

- A Digital services company was transforming their sales teams to help refocus their attention on customer interactions and deal flow.
- The company suspected they had a meeting culture that was stealing time away from customers and resulting in lower revenue as a result

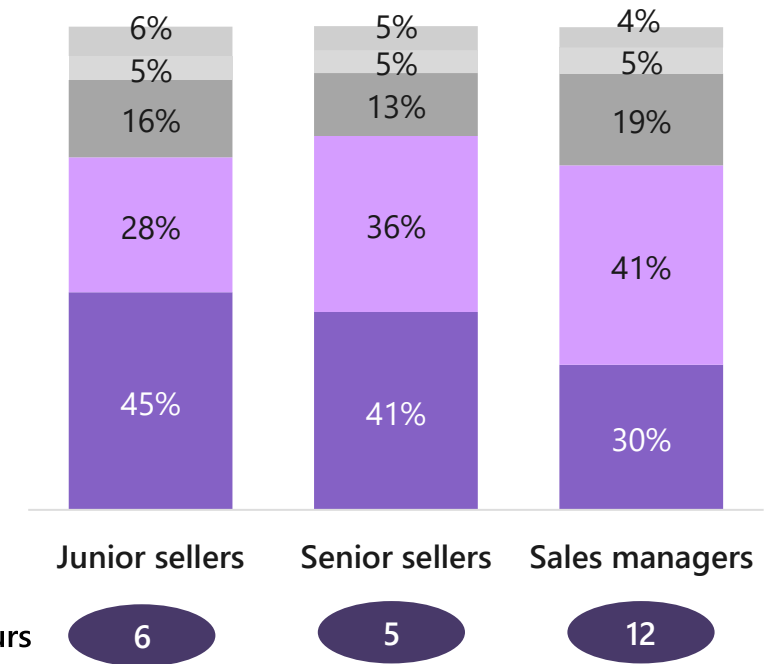
Internal meeting subject categories and keyword examples:

- **Extracurricular:** food, volunteer, safety, wellness
- **Admin and operations:** sync call, brainstorming, process, invoice
- **Information sharing, coaching, and training:** townhall, all hands, brownbag, academy
- **Rhythm of business²:** weekly, monthly, review, update
- **Product, sales prep, post-sales support:** customer, product-related descriptions, prospecting, mitigation, support, maintenance

Workplace Analytics solution

- Using Workplace Analytics, the customer discovered that sellers were investing 30-40% of their internal meeting time related to Rhythm of business (RoB) activities, which totaled tens of thousands of hours a week at an opportunity cost of customer activity that could drive millions of additional dollars of revenue each week

Meeting time allocation by key topic categories



Action and impact

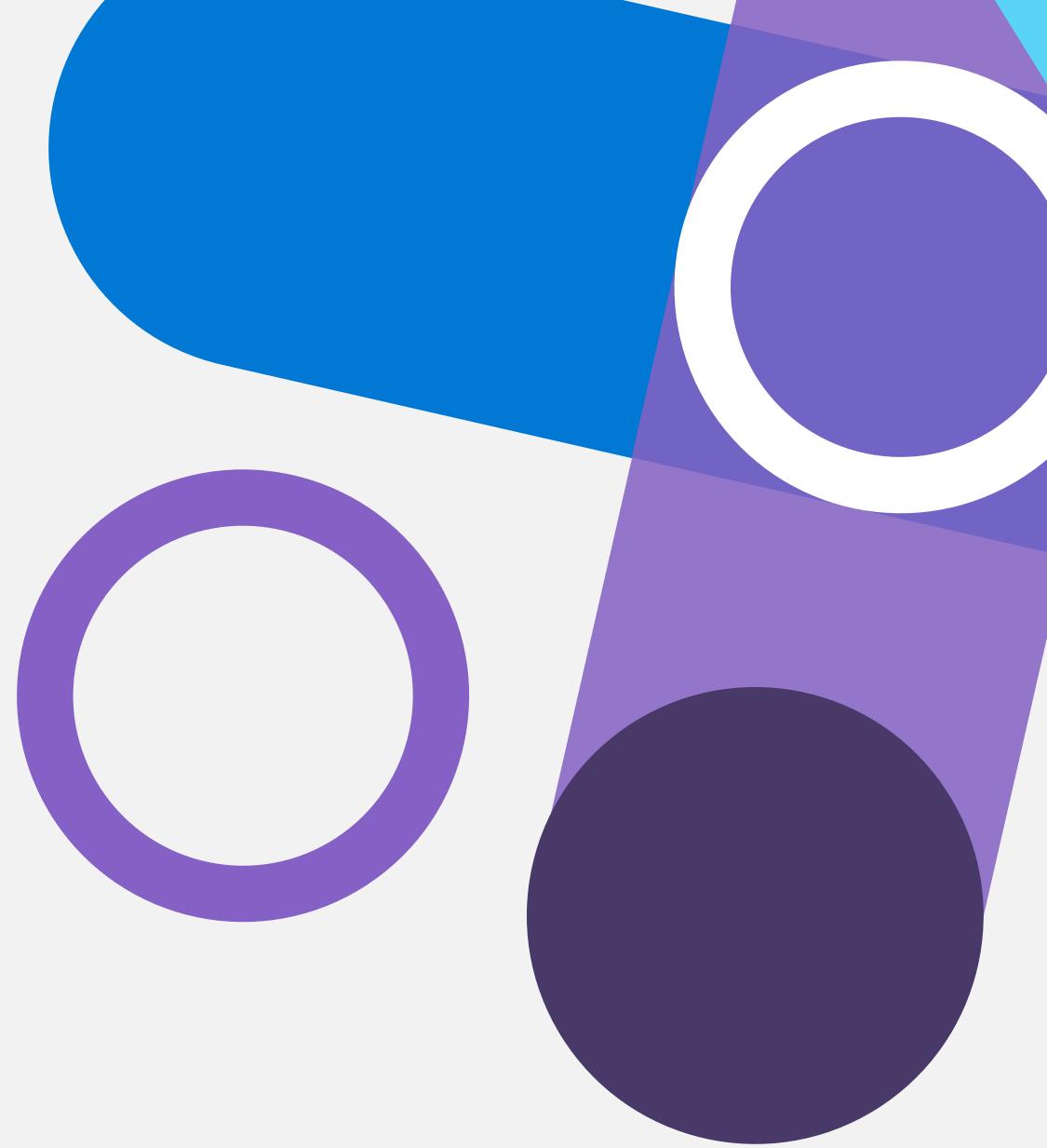
- In a pilot project, one sales segment decided to audit their top 25 RoB meetings and systematically eliminated, reduced the invite list, changed the frequency, and reduced the duration of the meetings that were pulling salespeople away from sales related activities.
- Early results showed that top performing salespeople spent 10 to 20% less time each week in these internal RoB meetings and focused on small-group sessions with customers instead

Key Insights

- Topic analysis can help identify the ways your team invests their time
- Low-value meetings can be audited and improved
- Standard, recurring, RoB meetings are often the largest category of activity. Shifting the frequency, substituting email or posts, and limiting meeting attendee lists to those expected to contribute can improve the collaboration load on the team

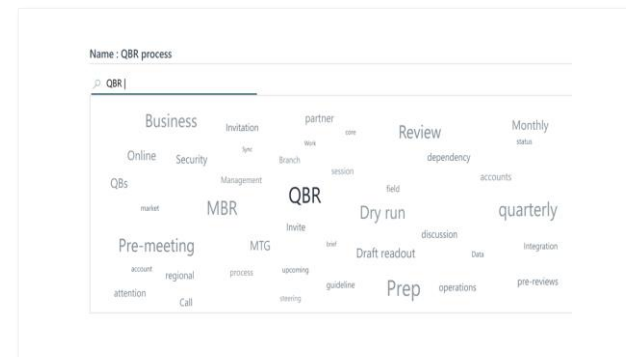
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Process analysis guidelines



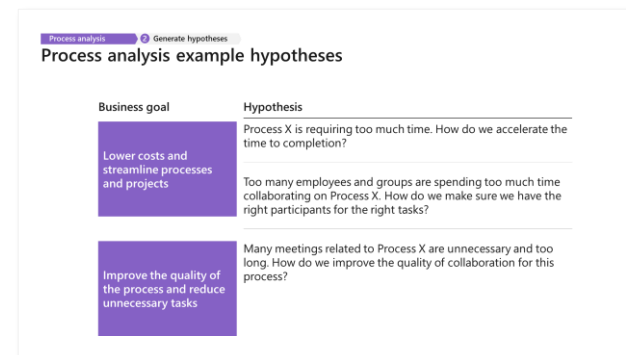
Define the process or project

Example: "Our *Quarterly Business Review* (QBR) preparation process is important, but it could be streamlined because it might currently involve too many stakeholders for too much time."



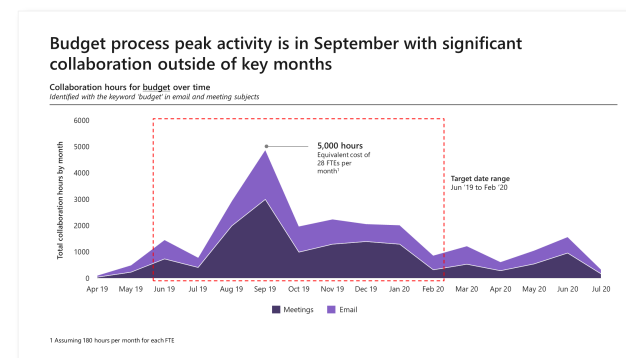
Generate a hypotheses

Example: “The highest volume of prep effort for QBR should only occur the last two weeks of the quarter but it’s suspected that an ongoing prep off-cycle might be occurring.”



Build the analysis

Example: "Observed some expected peaks but had no idea the process took over 4,000 hours of employee time!"



Process analysis scoping workshop

Step 1

Identify words or phrases that are frequently used to describe this process

Quarterly Business Review

QBR

QBs

Biz Rev

Q1 BR Prep



Step 2

Run queries to test and check that keywords are "catching" and comprehensive

"Requires 10% of the Finance team's workweek, which seems accurate"



Iterate keyword search until satisfied you are describing a unique process

To help refine your keyword search, you can:

- Hold interviews with peers and leaders involved in the process
- Use advanced analytics methods, such as the wpa R package
- Use word clouds to visualize the frequency and pattern of prospective keywords

Example

Process name: Contoso finance quarterly business review

What do you want to change or solve about this process? *See the following Hypothesis guide*

Process owners: Finance planners, Budget committee, LRP team, Product owners, Sales leadership, and so on

Estimated time of process output: Roughly 20 people who spend about two hours of prep time per person over two weeks each quarter

Process analysis example hypotheses

Business goal

Lower costs and
streamline processes
and projects

Hypothesis

Process X is requiring too much time. How do we accelerate the time to completion?

Too many employees and groups are spending too much time collaborating on Process X. How do we make sure we have the right participants for the right tasks?

Improve the quality of
the process and reduce
unnecessary tasks

Many meetings related to Process X are unnecessary and too long. How do we improve the quality of collaboration for this process?

Data query recommendations

For this analysis, create a **Person query** and a **Meeting query** in Workplace Analytics and do the following:

- For the [Person query](#), in [Select metrics](#), select: **Email hours**, **Meeting hours**, **Generated workload email hours**, and **Generated workload meeting hours**
- Edit the metric names and use a filter to focus the analysis to data with a **Subject** that **Contains** the applicable process keyword. For example, the graphic shows the edited **Process X Generated workload email hours** metric has a filter where the **Email's Subject Contains Process X**
- For the [Meeting query](#), select the same time periods as you did for the Person query.
- In [Select metrics](#) for the Meeting query, select: **Attendee meeting hours**, **Attendees**, **Attendees multitasking**, **Attendees with conflicting meetings**, **Emails sent during meetings**, **Invitees**, **Redundant attendees**, and **Total redundant hours**
- In [Select filters](#), select **Meetings** where the **Subject Contains** the applicable process keyword. For example, the graphic shows the **Meeting's** filter where the **Subject Contains Process X**

1

Select metrics

What do you want to know about these employees? ⓘ

*

Generated workload me... ▼

Base Metric	Type	Display Name			
<div>Gene... ▼</div>	Hour	Process X Generated workl...			

Process X Generated workload email hours where

Confirm

×

Email's

Subject ▼

Contains ▼

Process X ×

2

Select filters

Which meetings do you want to include in your query results? ⓘ

Meeting's

Subject ▼

Contains ▼

Process X ×

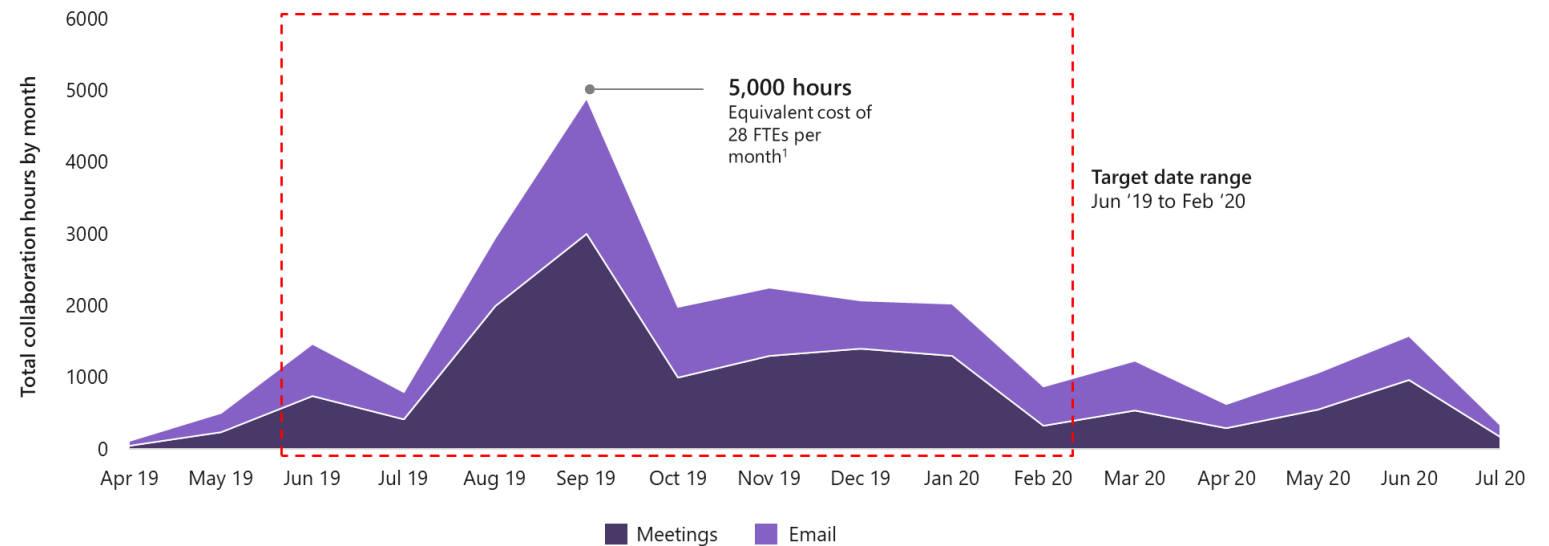
Hypothesis: The process is too long; how to accelerate completion?

- For a longitudinal view of the process collaboration time, you can use a Process cycle chart to show the peak activity period, and subsequent “waves” of activity, which is a great introduction into the collaboration effort for the process
- This example chart shows how the collaboration hours equate to months of full-time employees (FTEs) time to further quantify the collaboration load
- Additional exploration:
 - Is the peak longer or higher than expected?
 - Are there unexpected subsequent waves of activity that could indicate a break in the process?

Sample visualization

Budget process peak activity is in September with significant collaboration outside of key months

Collaboration hours for budget over time
Identified with the keyword 'budget' in email and meeting subjects



¹ Assuming 180 hours per month for each FTE

Hypothesis: Process X requires too much time; how to get the correct people to do the correct tasks?

- This example graphic shows how converting the collaboration hours to the number of months of employees' (FTEs) time can help further quantify the collaboration load
- This visualization introduces the total collaboration effort for the process
- Additional exploration:
 - What groups or functions are collaborating the most on this process?
 - Are employees working after hours to complete this process?

Sample visualization

Average of 448 hours per week spent collaborating on Process X

Total time invested over business cycle

Process X

Date range: week of 2 June 2019 to week of 23 Feb 2020 (38 weeks)



	Total	Weekly
Hours in meetings	9,000	237
Hours on emails	8,000	211
Total collaboration hours	17,000	448
Total meetings	3,452	91
Total emails	55,155	1451

➤ Estimated \$29K per week
Assuming \$65 per person hour

7,200 employees overall collaborated on Process X

¹ Includes all attendees, such as external collaborators and unlicensed populations

² Assuming 180 hours per month for each FTE

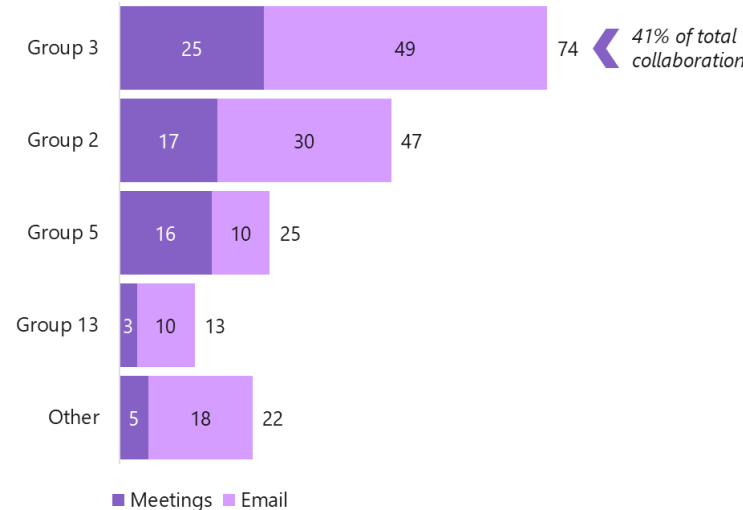
Hypothesis: Process X requires too much collaboration; how to confirm the correct participants are doing the work?

- Highlight the key functions, regions, and departments involved in the process
- Depending on the process, analyze the collaboration effort that is most likely concentrated to a few groups or is it more distributed; using organizational context is key in building your insights
- Additional exploration:
 - Are mostly managers or leaders working on the process?
 - Are relevant parts of the organization participating actively in the process?

Sample visualization

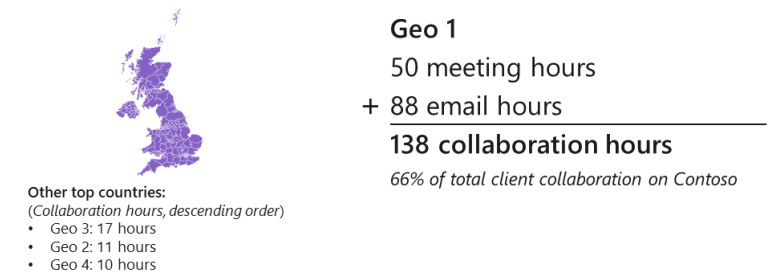
The **North sales team** spends the most time at one third of total collaboration hours, primarily in Geo 1 on Contoso

Total weekly collaboration hours on Contoso
By Organization



Date range: May '19 – July '20

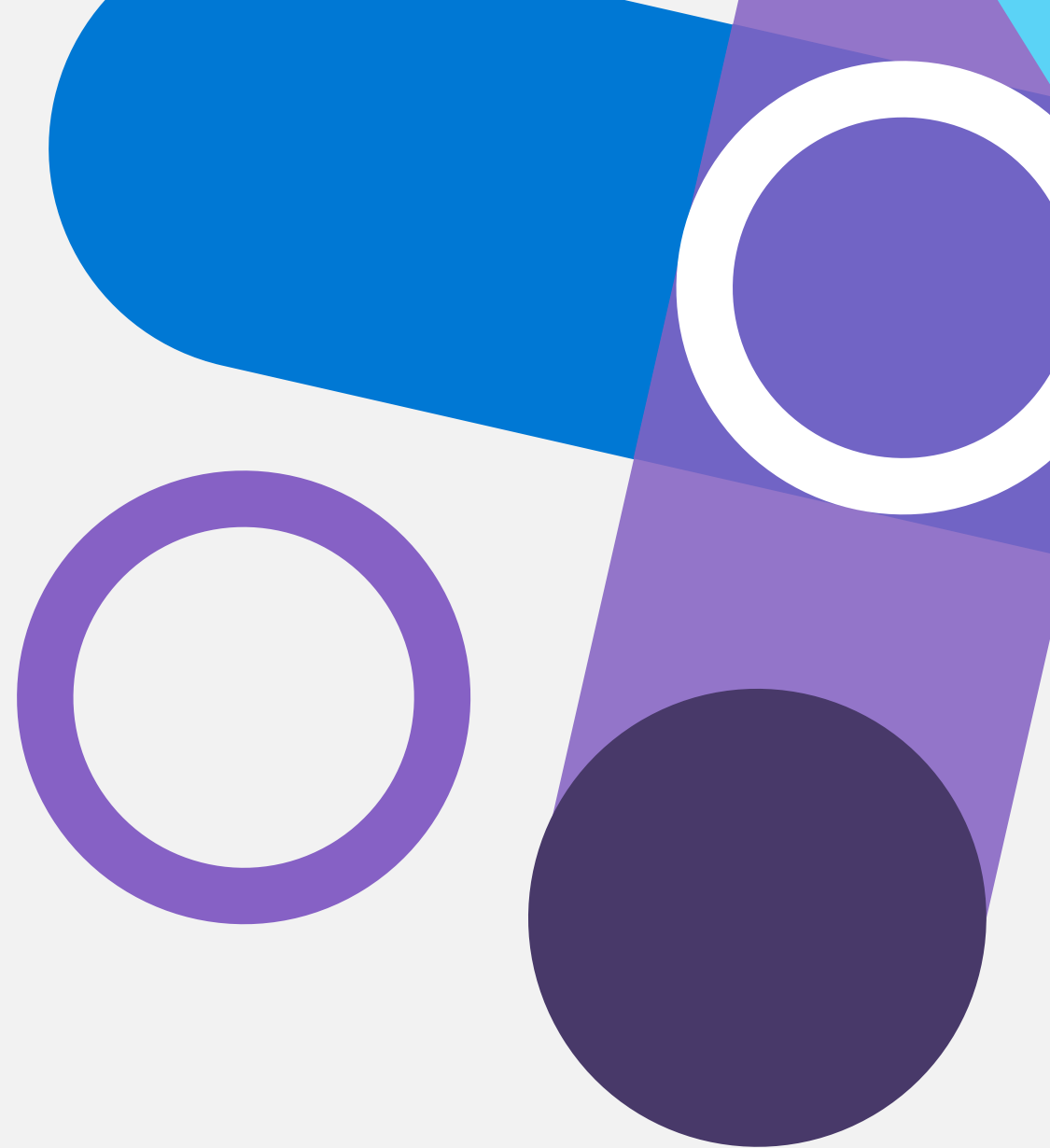
Total weekly collaboration hours on Contoso
By Country



Top 5 collaboration pockets for Contoso

Organization	Location	Collaboration hours	Percentage	Size
Group 3	North	1,600	33%	400
Group 2	North	720	15%	330
Group 5	North	349	7%	415
Group13	North	255	5%	55
Group 2	South	160	3%	230

Topic analysis guidelines



Define the scope of topics

Example: “A number of project reviews, approvals, and the time devoted to these activities continues to grow.”

Generate a hypotheses

Example: "Certain groups disproportionately own the rhythm of business activities. Can time be redirected to more impactful activities?"

Build the analysis

Example: "Analyzing where time is spent can help you redirect time to more impactful activities."

Sprint, Standup, agile, scrum

Team Synch, Weekly Synch, Group meeting

Project __, Review, project __ status

Business Goal	Hypothesis	Resources
Identify and reduce unnecessary tasks	Certain groups disproportionately own rhythm of business activities. Can we redirect time to more impactful activities?	Person Query Guide Visualization Guide
	What is the cost of our rhythm of business activities for the organization and where is there room to reduce costs?	Person Query Guide Visualization Guide
Increase capacity for revenue generating activities	Our customer facing teams are allocating too much time to internal activities	Person Query Guide Visualization Guide



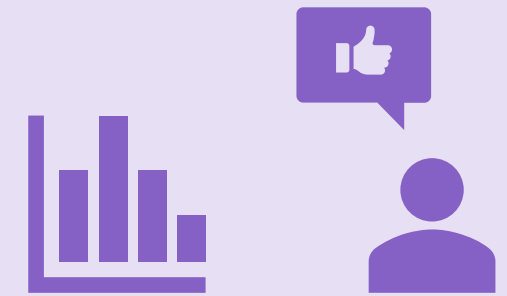
Common collaboration categories in an organization

Use the following common collaboration categories and keywords to get your topic analysis started

Parent category	Subcategory	Keywords
Team and process governance	Team meetings	Team synch, weekly synch, group meeting
	Process or project review	Process X, review, process X status
External focus	Customer and partner	Customer names (metric filters for external domains)
	Internal coordination	Customer names (metric filters for internal domains)
Project (or process) teams	Products and offerings	Product names
	Internal projects	Process or project name (metric customization with internal domains)
Coaching and development	Readiness and upskilling	Workshop, office hours, learn, series, education, career
	Coaching and 1:1s	1:1, coaching, (meeting category with 2 participants)
Strategic planning and review	Business review	Business review, quarterly review
	Planning	Strategic planning, strategy, governance
	Information sharing	Status update, all hands, summit, townhall
Admin	Administration	Action required, feedback, financial, safety, register, give

Run queries to test and check that keywords are "catching" and comprehensive

"Requires 10% of Finance's workweek, seems correct"



Topic analysis example hypotheses

Business goal

Identify and reduce unnecessary tasks

Hypothesis

Specific groups disproportionately own the rhythm of business activities. Can these groups' time be redirected to more impactful activities?

What is the cost of the rhythm of business activities for the organization? Where can costs be reduced?

Increase capacity for revenue generating activities

Customer facing teams are allocating too much time to internal activities. Where can time be made available to spend with customers or closing deals?

Data query recommendations

For this analysis, create a [Person query](#) in Workplace Analytics with the following customizations:

- In [Select metrics](#), select: **Email hours** and **Meeting hours**
- Edit the metric names as applicable and use filters for the Subject and Domains with the applicable keywords. For example, the graphic shows the **Email hours for Process X** metric where the filter is **Subject Contains Process X**
- Also add additional Meeting and Email hours metrics for customer collaboration, including a custom **Meeting hours with customers** metric with a filter where at least one of the meeting participants are outside the company domain. For example, the graphic shows the **Meeting hours with customers** metric that filters for **At least one attendee's and/or recipient's Domain** does not contain **contoso**

Email ho...	Hour	Email hours for Process X			
Email hours for Process X where					
		Subject	Contains		①
		process X ×			

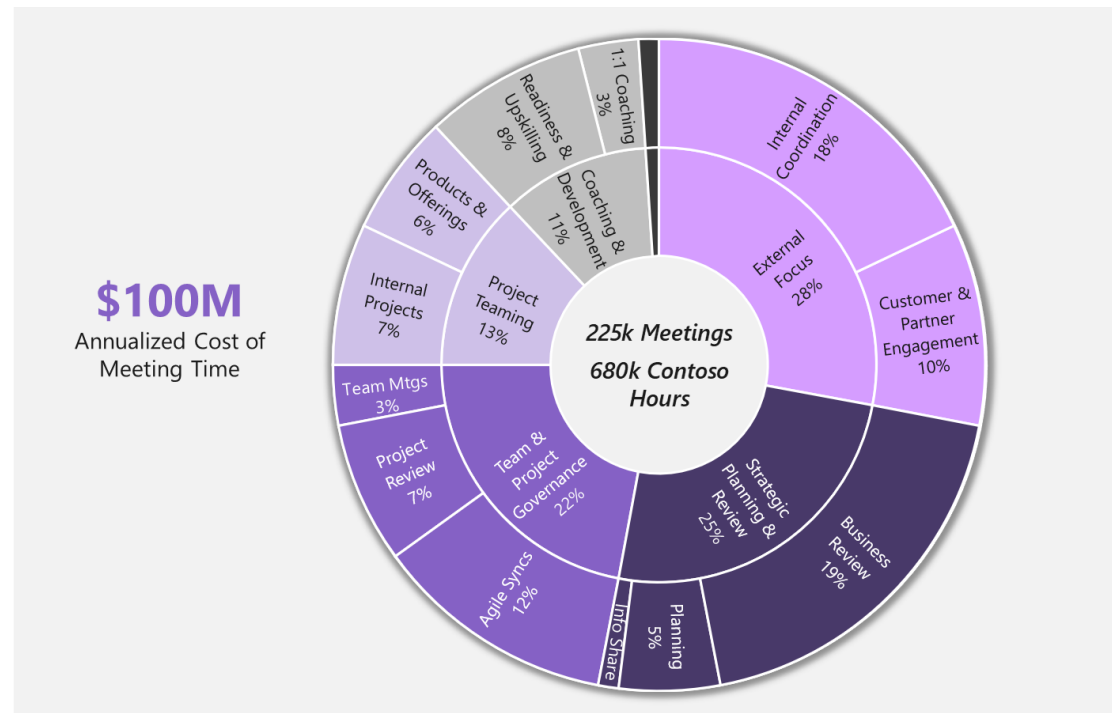
Base Metric	Type	Display Name			
Meeting...	Hour	Meeting hours with customers			
Meeting hours with customers where					
		At least one	attendee's and/or recipient's	Domain	Not cont...
				contoso ×	1 selected

Hypothesis: Cost of the rhythm of business activities and where can costs be reduced?

- This shows a sunburst chart with the categories and subcategories of related collaboration activities
- To quantify the cost, a standard hourly rate of \$75 is used for knowledge workers' time
- Additional exploration:
 - Which organizations collaborated the most in each activity area?
 - How was the quality of collaboration compared to the time invested in each category?

Sample visualization

Analyze how time is spent to redirect focus to more impactful activities



Insights

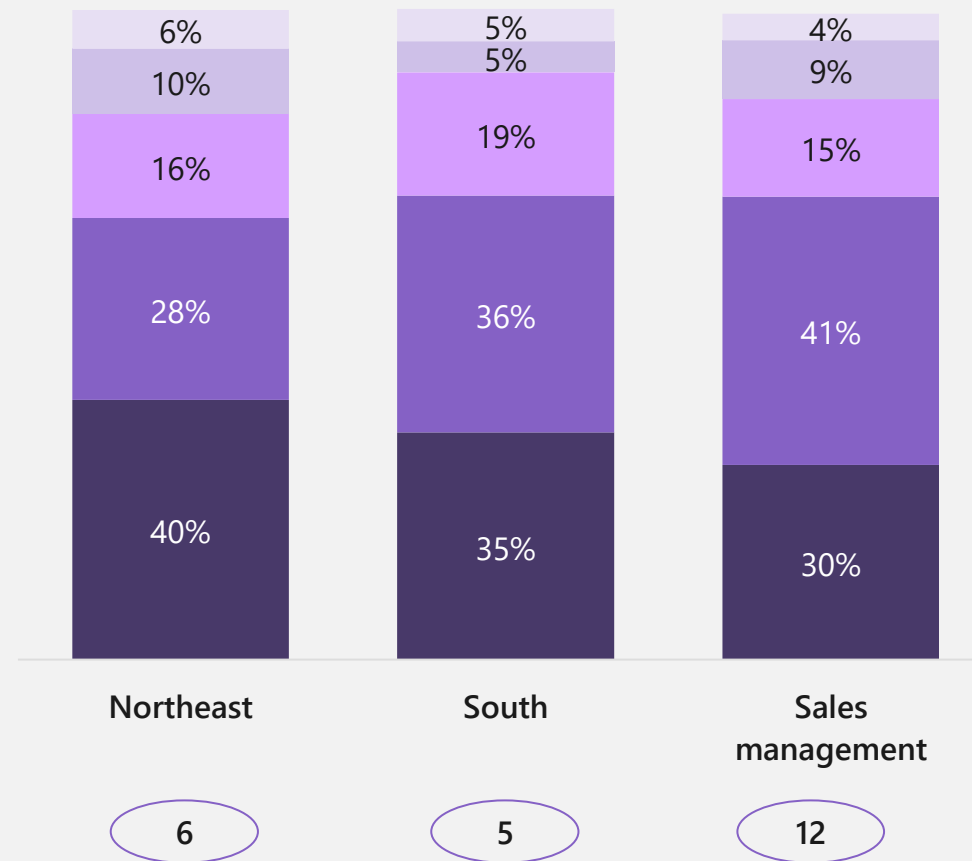
- 57% of Contoso meeting time is spent on Strategic Planning & Review + Team & Project Governance. This represents a \$55M annual investment in employee time, and is likely one of the drivers behind engagement survey results highlighting excessive levels of bureaucracy, process bloat, and a lack of agility at the organizational level.
- 28% of meeting time on Go-to-Market activities, but only 1/3 of that time is spent engaging directly with customers and partners
- Coaching and Development activities consume 11% of meeting time. Only about a quarter of that time is spent in 1:1 activities.

Sellers spend 30 to 40% of their time on internal rhythm of business activities

Internal meeting time allocation by keywords

Internal meeting subject keywords¹:

- Extracurricular:** food, volunteer, safety, wellness
- Admin and Operations:** sync call, brainstorming, process, invoice
- Info sharing, coaching, and training:** townhall, all hands, brownbag, academy
- Rhythm of business²:** weekly, monthly, review, update
- Product, sales, post-sales support:** customer, fiber, prospecting, mitigation, outage, maintenance



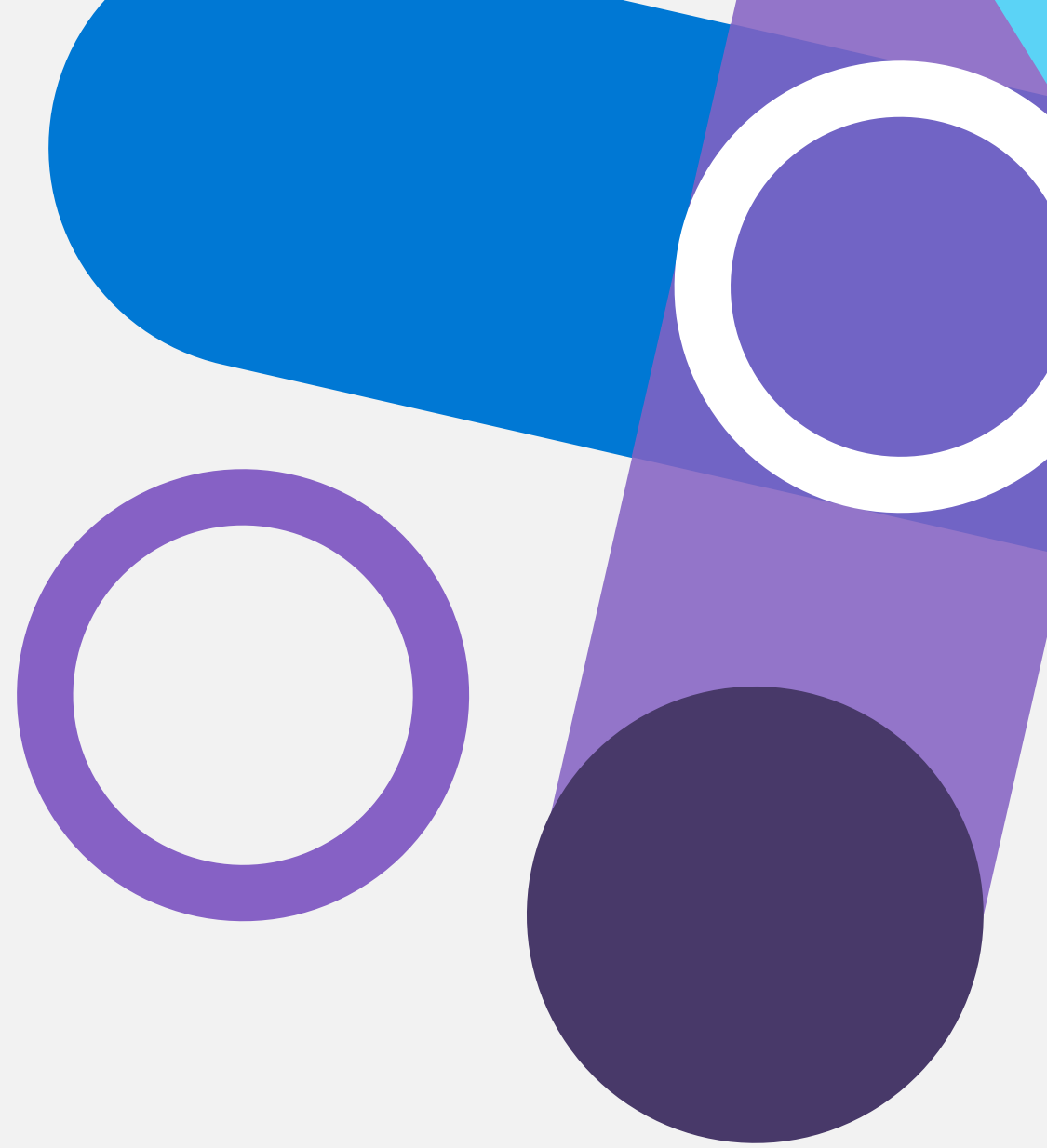
Insights

- After reviewing the top meeting topics and subjects, create a table. This shows a stacked bar chart that characterizes the meeting subject categories. In this example, the Rhythm of business (RoB) meetings consume 30 to 40% of the salespeople's time, which could be spent in with customers or internally on sales and customer related activities.
- This example quantifies the value of the time spent internally by calculating the average sales volume for a seller (by role) and dividing it by a 2,000-hour work year. This helps reveal the potential opportunity cost of RoB related meetings. With this logic, sellers who generate an average \$1M in annual sales volume could generate \$500 in additional revenue for every hour of capacity made available for related sales activities. Removing one hour a week in RoB time could provide sales related time that yields \$25K more per seller, per year.

1. Refer to the Appendix for a full list of meeting keywords by topic

2. Assuming \$500 in revenue per seller per hour, removing one hour from RoB activity per week could unlock capacity to generate \$25,000 in revenue each year per seller

Take action



Drive behavioral change with Workplace Analytics insights

Analyze to identify opportunities

Operational effectiveness use case




Process analysis

Topic analysis

- Identify the opportunities
- Define the target group for change initiatives

Design change interventions

Design change interventions: Opportunities and actions



Opportunity	Interventions	KPIs
 Address collaboration overload in groups affected by excess or unneeded business activity (such as high admin email and meeting load)	<ul style="list-style-type: none">• Rollout a Workplace Analytics Collaboration plan. Use in-product inline suggestions to encourage less meetings.• Communicate to the team that leadership and managers want to change collaboration activity and should model change by declining meetings they do not need to attend and request their team do the same.	<ul style="list-style-type: none">• Weekly meeting hours• Weekly email hours
 Reduce size and frequency of recurring meetings and reallocate or increase effort for strategic priorities	<ul style="list-style-type: none">• Quickly identify the costliest meetings and determine which leaders are generating the most meeting hours (or analyze by topic area).• Display a public counter with time and money saved. Connecting the time spent in meetings to the cost of all employee time will increase awareness of cost of meetings to organizers.	<ul style="list-style-type: none">• Percentage of meeting hours focused on strategic activity (such as Product or Sales)• Percentage of meeting hours with 11+ attendees• Percentage 11+ attendee meetings that are recurring
 Discourage multitasking and track conflicting meetings KPIs to reduce collaboration overload	<ul style="list-style-type: none">• Streamline behaviors needed to achieve better meetings through crowdsourcing best practices for meetings and posting them to promote positive change.• Track KPIs weekly to evaluate what teams or initiatives are most effective.	<ul style="list-style-type: none">• Low-quality meeting hours• Conflicting meeting hours• Multitasking meeting hours

Change opportunity worksheet

Define change tactics to implement and leverage Workplace Analytics [best practices](#)

Measure and iterate

Measure and iterate: A starter pack of change levers

Change lever	Recommended actions
 Process redesign	<ul style="list-style-type: none">• Reduce process cycle time, such as shorten or concentrate the peak activity periods of collaboration.• Move relevant processes to automation, such as automate workflow, approvals, and handoffs.• Stagnate the process start and end dates to prevent overlapping high collaboration periods.
 Behavioral change management	<ul style="list-style-type: none">• Redefine roles and responsibilities of groups involved in the process.• Conduct a meeting audit to remove unnecessary meetings and reduce meeting length.• Allocate a meeting "zero based budget" initiative to empower employees to optimize their time.• Create a collaboration dashboard for each major process to track collaboration costs.




Measure and iterate: Use scorecards and dashboards to monitor process improvements

Organization	50 process time	100 process time
Group 1	1,000 hours	877 hours
Group 2	800 hours	1,000 hours
Group 3	300 hours	800 hours
Group 4	200 hours	300 hours

Tracking dashboard

Create custom analysis with Workplace Analytics [Power BI templates](#) or integrate with existing Power BI dashboards to track progress

Design change interventions: Opportunities and actions

Opportunity	Interventions	KPIs
 <p>Address collaboration overload in groups affected by excess or unneeded business activity (such as high admin email and meeting load)</p>	<ul style="list-style-type: none">Rollout a Workplace Analytics Collaboration plan. Use in-product inline suggestions to encourage less meetings.Communicate to the team that leadership and managers want to change collaboration activity and should model change by declining meetings they do not need to attend and request their team do the same.	<ul style="list-style-type: none">Weekly meeting hoursWeekly email hours
 <p>Reduce size and frequency of recurring meetings and reallocate or increase effort for strategic priorities</p>	<ul style="list-style-type: none">Quickly identify the costliest meetings and determine which leaders are generating the most meeting hours (or analyze by topic area).Display a public counter with time and money saved. Connecting the time spent in meetings to the cost of all employee time will increase awareness of cost of meetings to organizers	<ul style="list-style-type: none">Percentage of meeting hours focused on strategic activity (such as Product or Sales)Percentage of meeting hours with 11+ attendeesPercentage 11+ attendee meetings that are recurring
 <p>Discourage multitasking and track conflicting meetings KPIs to reduce collaboration overload</p>	<ul style="list-style-type: none">Streamline behaviors needed to achieve better meetings through crowdsourcing best practices for meetings and posting them to promote positive change.Track KPIs weekly to evaluate what teams or initiatives are most effective.	<ul style="list-style-type: none">Low-quality meeting hoursConflicting meeting hoursMultitasking meeting hours

Measure and iterate: A starter pack of change levers

Change lever

Process redesign









Recommended actions

- Reduce process cycle time, such as shorten or concentrate the peak activity periods of collaboration.
- Move relevant processes to automation, such as automate workflows, approvals, and handoffs.
- Stagnate the process start and end dates to prevent overlapping high collaboration periods.

Behavioral change management

- Redefine roles and responsibilities of groups involved in the process.
- Conduct a meeting audit to remove unnecessary meetings and reduce meeting length.
- Allocate a meeting “zero based budget” initiative to empower employees to optimize their time.
- Create a collaboration dashboard for each major process to track collaboration costs.


Measure and iterate: Use scorecards and dashboards to monitor process improvements

Use key metrics in Workplace Analytics to analyze process impact (such as time investment, cycle time, and number of people involved in a process) and to track the progress and status of implemented process changes	Organization	Q1 process time	Q2 process time
	Group 3	 1,599 hours	 977 hours
	Group 2	 865 hours	 1,222 hours
	Group 5	 341 hours	 663 hours
	Group 13	 249 hours	 265 hours

Take action: Additional resources

Resource

Description



Drive organizational change with Microsoft Workplace Analytics and MyAnalytics

40 min • Module • 7 Units

★★★★★ 4.9 (20)

Intermediate Business Analyst Data Analyst Business Owner Microsoft 365 Workplace Analytics Power BI

After using Microsoft Workplace Analytics and Power BI to generate insights about your employees' work behaviors, you'll learn about the Microsoft 365 features that can be tools to implement and measure the changes you've identified. You'll learn how to initiate common change practices and what tools and tactics are the most useful.

Learning objectives

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

- Define the Microsoft 365 tools that drive behavior change.
- Identify common practices you can use to improve workplace scenarios.
- Design custom tactics to drive change.
- Identify methods to measure behavior change.

[Drive organizational change with Microsoft Workplace Analytics and MyAnalytics](#)

An online, self-paced Microsoft Learn module that helps you understand:

- Microsoft 365 tools that help drive change
- Common change practices and tactics

Workplace Analytics best practices



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
Discover why sharing ideas and expertise across the company makes 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.

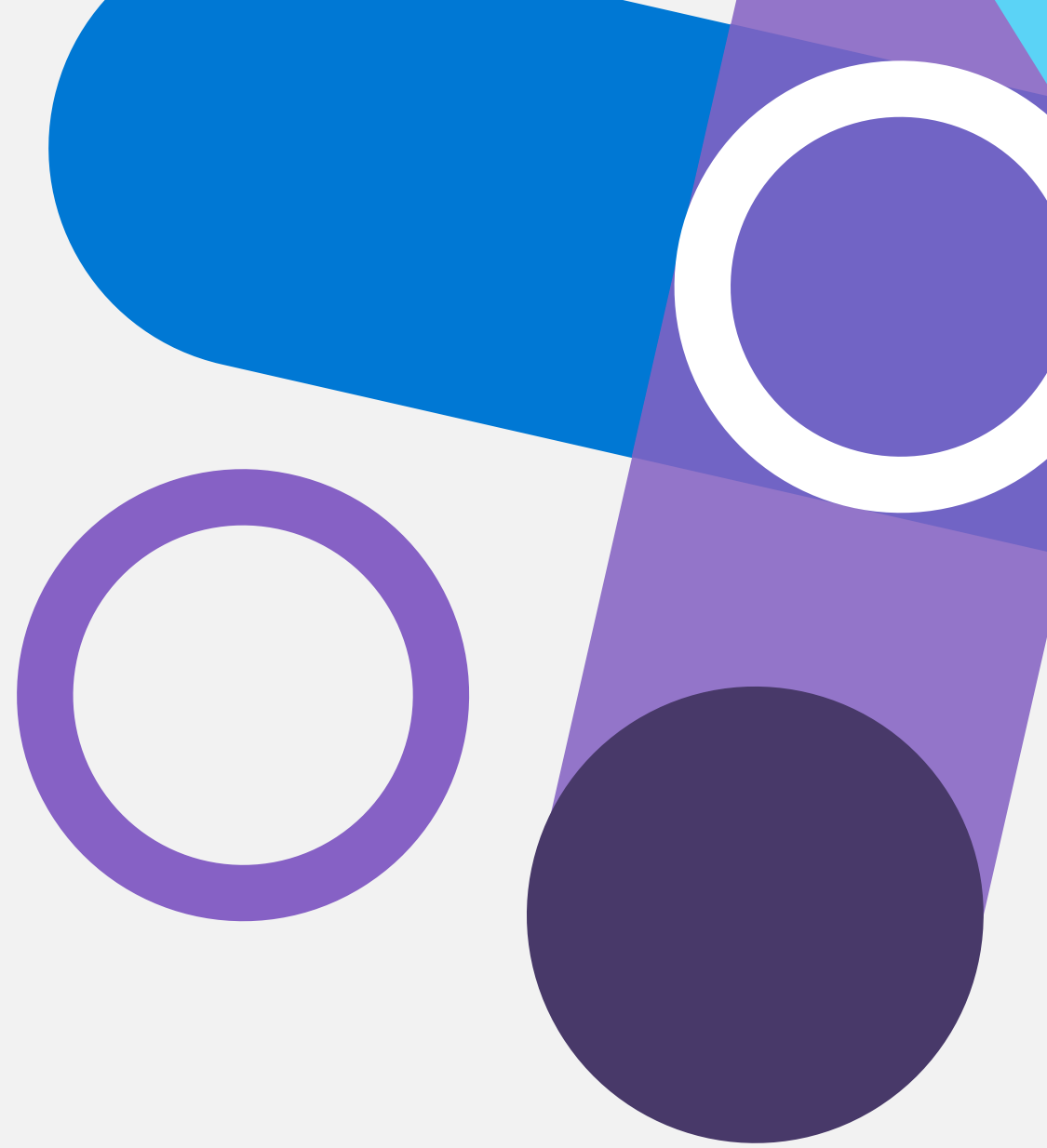


Community connectivity
Learn how creating a work community helps improve overall team wellbeing and productivity.

[Workplace Analytics best practices](#)









An online site with best practices and change strategies for related business outcomes

Appendix



Measure and iterate: Use scorecards and dashboards to monitor process improvements

Use key metrics in Workplace Analytics to analyze process impact (such as time investment, cycle time, and number of people involved in a process) and to track the progress and status of implemented process changes

Organization	Q1 process time	Q2 process time
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Meeting topic keywords

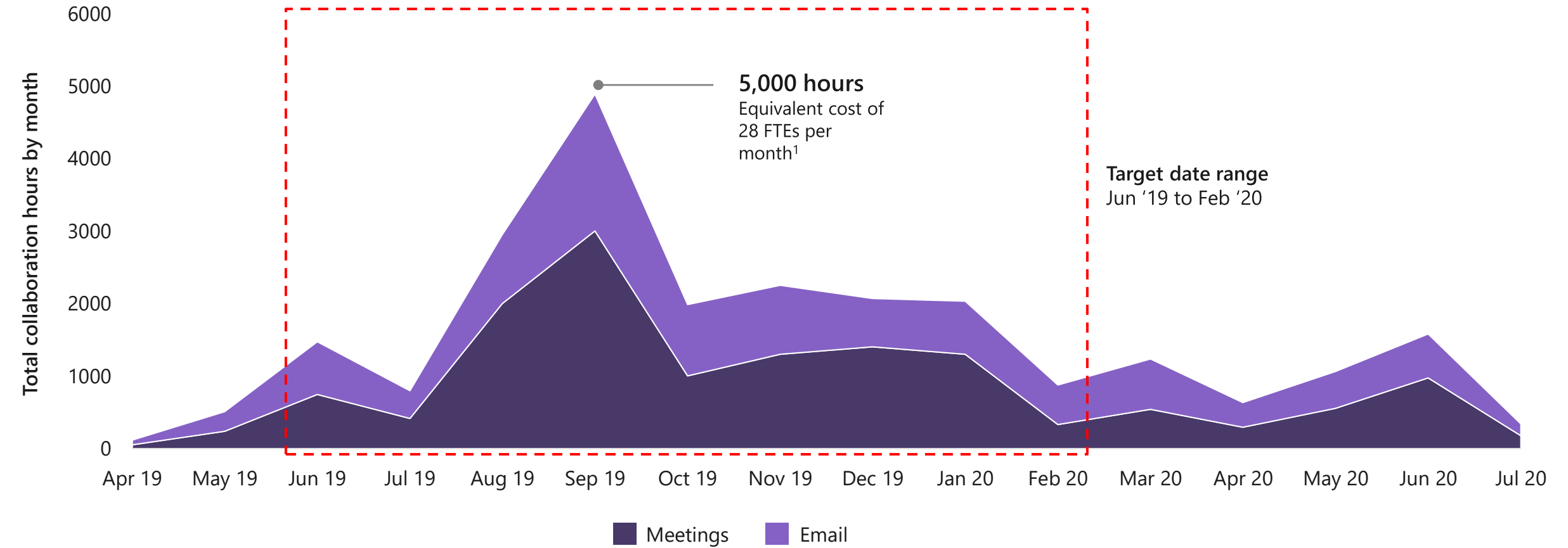
Info Sharing, Training & Coaching		Product & Sales Prep	Post-sales Support		Rhythm of Business	Admin & Ops	Extracurricular & Others	
Information sharing	Training and Coaching	Sales and Product (1/2)	Post-sales Support (1/2)	Post-sales Support (2/2)				
Investor relations	Webinar	Selling	Root cause investigation	Migration	Virtual offsite	Business committee	Going away	Flu shot
Shakeout	User group	Telecom	Site work	Mitigation	Review	Synch call	Fall harvest	Anniversary
Earnings	Leadership connect	Market meeting	Defect	Phase	Forecast	Sync call	Commencement	Award
Town	Practitioner	Prospecting	Reboot	Pre-stage	Financial	Sync	Funrun	Give
Hands	Conference	Customer	Reboots	Cut-over	Huddle	Synch	Day out	Farewell
Global	Tabletop	Quote	Intrusive testing	Install	Month	Stakeholder meeting	Picnic	Social
Hall	Membership	Quotes	Stress test	Deployment	Sales planning	Coalition	Bring a dish	Lunch
Save the date	Courses	Pricing	Impacted	Replacement	Funnel	Board retreat	Reception	Ceremony
Townhall	Training	Proposal	Services request	Maintenance	Report	Board and committee	Casino	Women
Summit	1:1	Sow	Testing	Command center	Planning	Committee meeting	Celebrating	Employee
Kickoff	Learn	Activation	Cutover	Prod rollout	Base	Board meeting	Celebration	Volunteer
Kick	Workshop	Prep	Sprint	Hotfix	Team call	Council meeting	Ribbon cutting	Safety
All hands	Office hours	Strategy	Hot cut	All day swat call	Quota	Turnover	Nacho	Rally
Allhands	Boot camp	Rfp	Ticket	Failure	Monthly	Project	Eat for a cause	Register
All-hands	Curriculum	Rfq	Ticketing	Day of action	Biweekly	Program	Hike	Survey
Announcement	Career	Contract	Troubleshooting	Resolve	Every week	Sourcing	Hh	Diversity
Broadcast	1 on 1	Presentation	Task force	Apply patch	Status	Vendor	Oktoberfest	Wellness
	Education	Reseller meeting	Salesforce		Update	Process	Mixer	Retreat
	1x1	Sales	Sfdc		Updated	Contractor	Teambuilding	Thanksgiving
	Forum	Launch	Stability		Recurring	Brainstorm	"Team building"	Farewell
	Seminar	Product	Replace		Cadence	Brainstorming	Outing	Bake
	Session	Partner	Issue		Qbr	Sap	Cookout	Surprise
	Mentor	Ethernet	Transition		Staff	Master plan meeting	Cook off	Golf
	Academy	Customer	Damage prevention		Daily	Coordination mtg	Pot luck	Remote
	Office hour	Customers	Support		Quarter		Potluck	Soccer
	Bootcamp	Account	Expansion		Quarterly		Celebration	Cricket
	1on1		Failover		Executive		March madness	Basketball
	Lunch and learn		Impact		Steering		Debate	Practice
	Lunch talk		Emergency		Governance		Community service	Coffee
	Orientation		Release		Budget		Celebratory	Bowling
	Onboard		Outage		P&I		Cook-off	Beer
	Knowledge share		Touch point		Business update		Hurrah	Drinks
	Brownbag		Problem solving		Weekly		Festivities	Trivia
	Brown bag		Construction		Bi-weekly		Team building	Field day
	Roadshow		Implementation		Off-site		Food	Campus tour
			Critical		Qmb		Friendship	Bbq
			Upgrade		Annual		Happy hour	Open house
			Flash cut		Q1		Happyhour	Send-off
			Bridge		Q2		Santa	Extravaganza
			Bill		Q3		Cupcake	Arriving later in the day
			Billing		Q4		Social	Shenanigans
			Working bridge				Grill	Club

Meeting example categories and subjects

Information sharing, training and coaching	Product and sales	Post-sale support	Rhythm of business	Admin and operations	Extracurricular and others
Weekly all hands call Field marketing update	Team prospecting	Scheduled maintenance	December EOM review	Technology RFI and vendor selection process review	Conquest volunteer program
Product and service training with sales and engineering	Team sales blitz	\$150K Shortfall mitigation	Central region EcoSystem, funnel weekly call	New hire process	Volunteering at hospital
Integration product brown bag training	Prospecting calls	Follow up internal call about template outage, ticket 1234567	Weekly big deal (\$100+)	Next steps on pricing process	Safety meeting
Outreach quick start or basic training	National enterprise sales Blitz: Cloud, Outsourcing, East region	Review catalyst outage path update	****Mandatory****EOM review call	Review invoices	Wellness check In
Learn more about the cloud	Central region account strategy series	Support	Texas sales funnel Management meeting	Comp questions	Food truck day
Weekly learning presentations and feedback	Quotes	AAON voice complete implementation update	Weekly large deal Optimization session	Account sync lunch	US Bakery get well plan status
Bootcamp part 1	Activation call	TEAM Industrial, order tracker, issues	Daily call	Internal – Weekly Escalation Forum – Process Issues, Service Escalations, General Questions, etc.	Young life club
1:1	Afternoon blitz	Discuss analysis group renewal and upgrades	Daily team meeting	Expenses, SFDC Updates	College connect
CEM office hour	Dallas sales team meeting	Upgrades	Order status call	Project reviews	Lunch guaranteed rate
Mentorship meeting	Sales high priorities call	Financial migration project	Weekly team meeting	Weekly review Operational meeting	Lunch with ABC

Budget process peak activity is in September with significant collaboration outside of key months

Collaboration hours for budget over time
Identified with the keyword 'budget' in email and meeting subjects

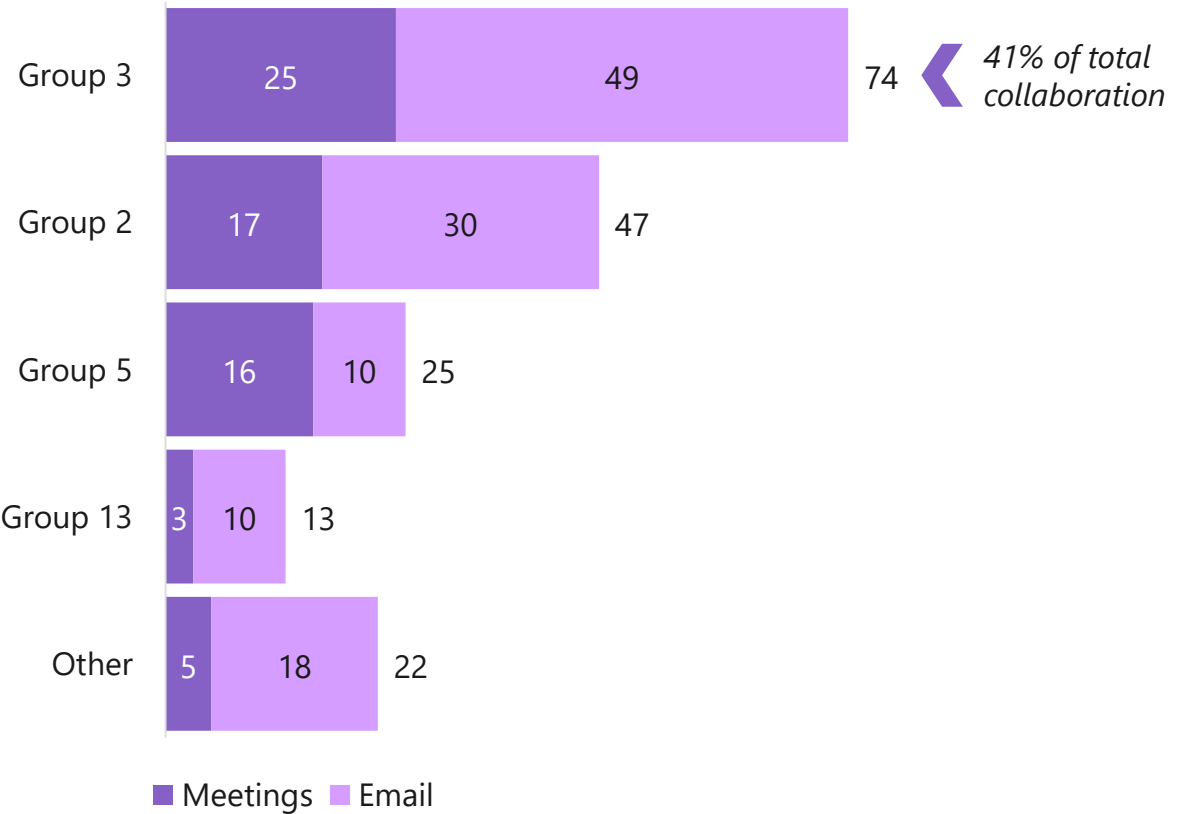


1 Assuming 180 hours per month for each FTE

The North sales team spends the most time at one third of total collaboration hours, primarily in Geo 1 on Contoso

Total weekly collaboration hours on Contoso

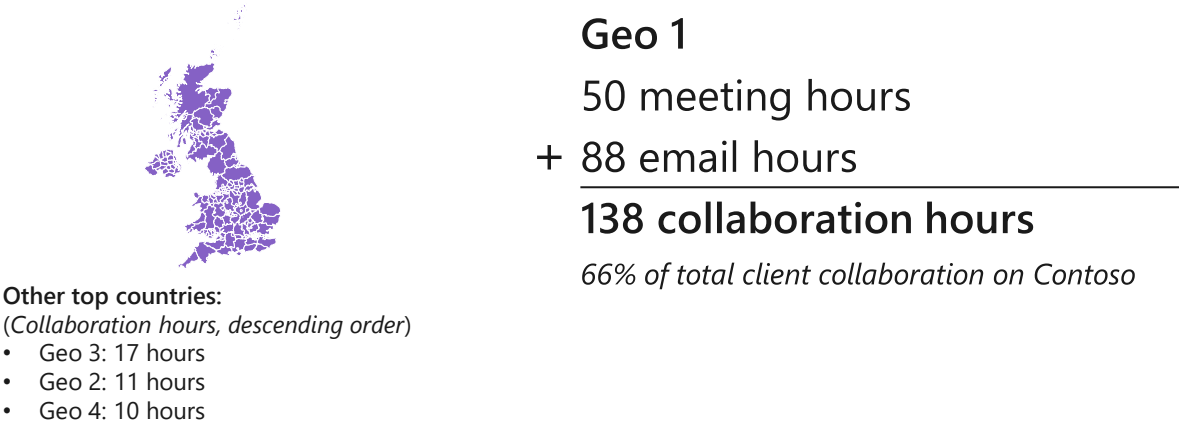
By Organization



Date range: May '19 – July '20

Total weekly collaboration hours on Contoso

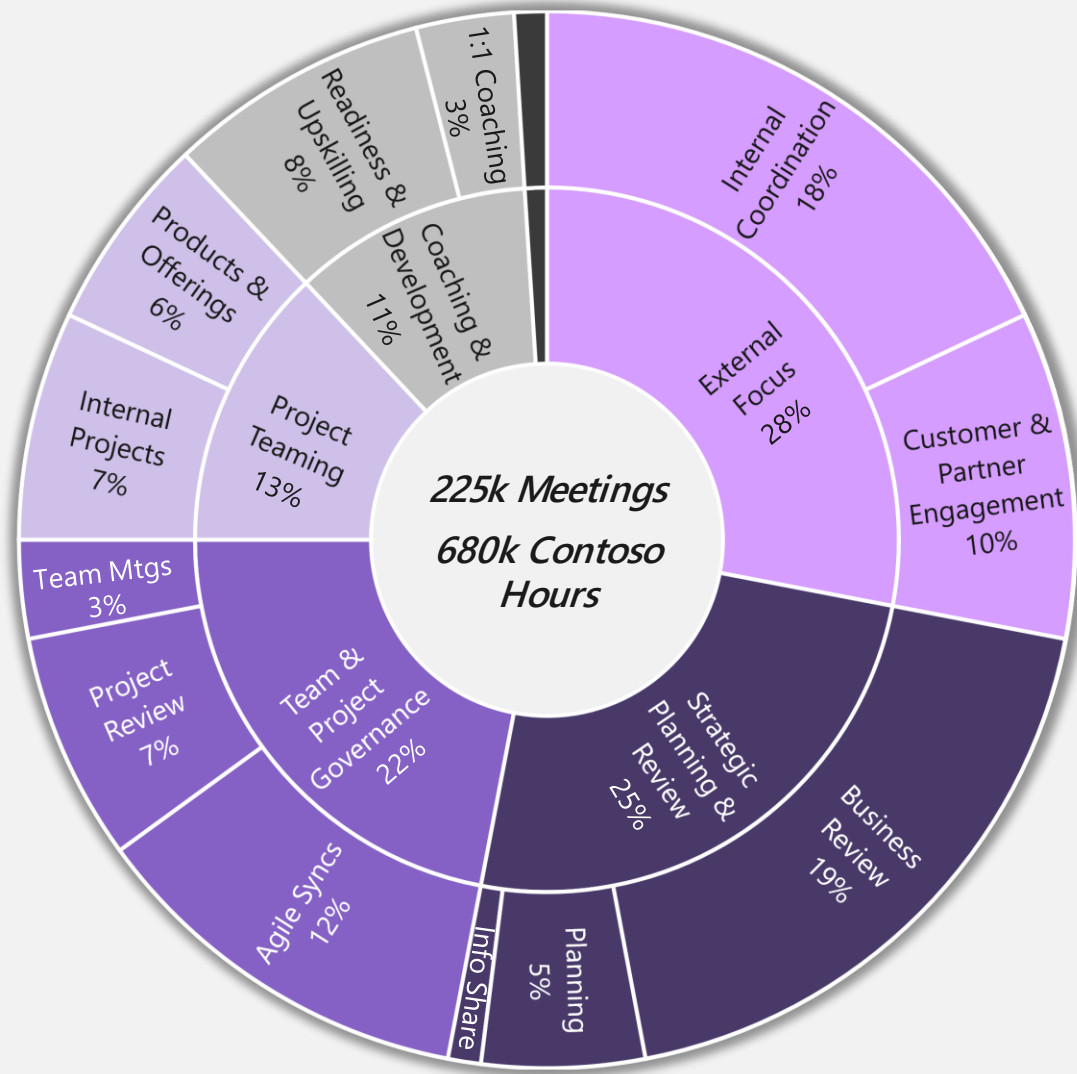
By Country



Top 5 collaboration pockets for Contoso

Organization	Location	Collaboration hours	Percentage	Size
Group 3	North	1,600	33%	400
Group 2	North	720	15%	330
Group 5	North	349	7%	415
Group13	North	255	5%	55
Group 2	South	160	3%	230

Analyze how time is spent to redirect focus to more impactful activities



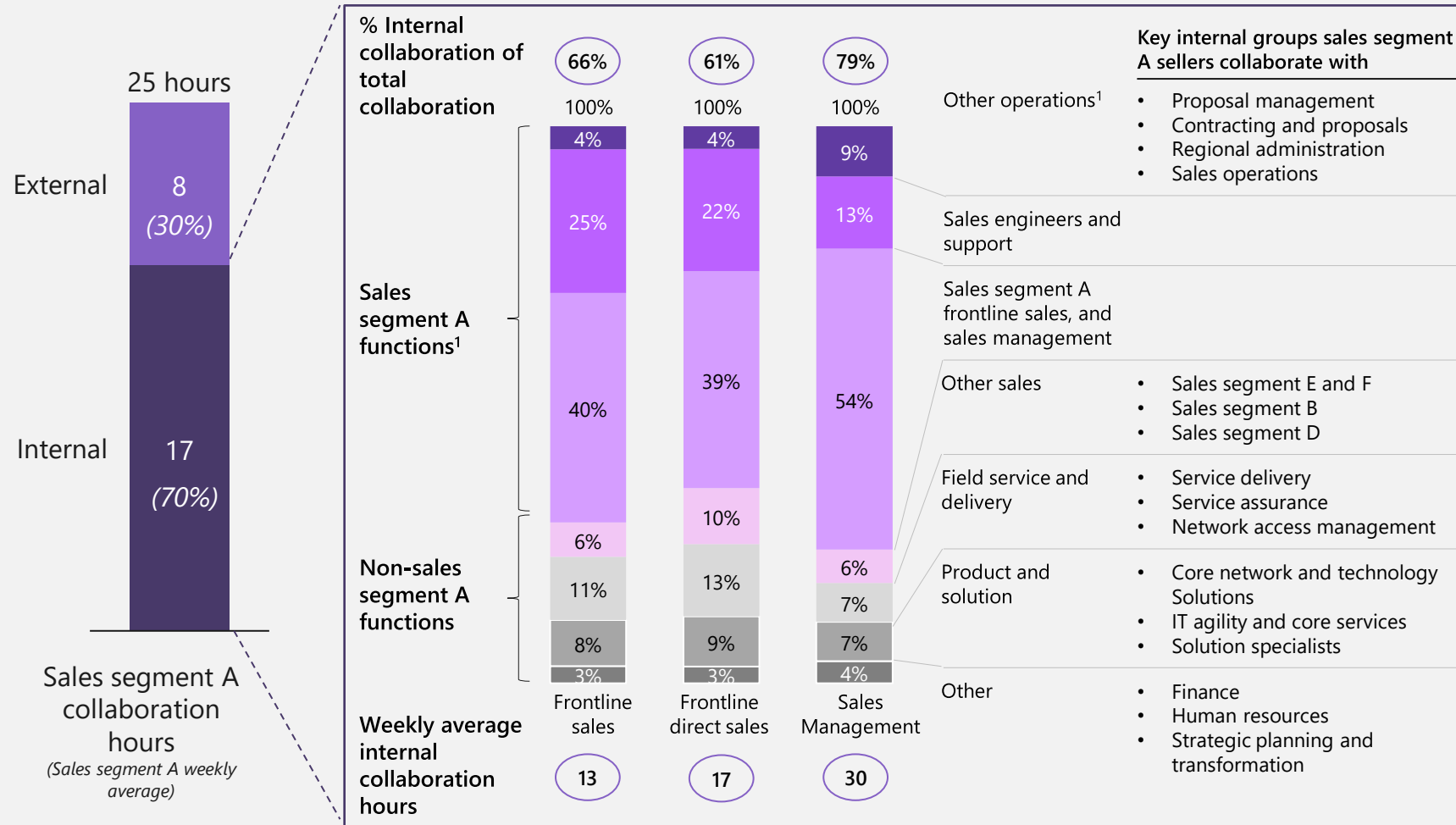
\$100M
Annualized Cost of Meeting Time

Insights

- 57% of Contoso meeting time is spent on Strategic Planning & Review + Team & Project Governance. This represents a \$55M annual investment in employee time and is likely one of the drivers behind engagement survey results highlighting excessive levels of bureaucracy, process bloat, and a lack of agility at the organizational level.
- 28% of meeting time on Go-to-Market activities, but only 1/3 of that time is spent engaging directly with customers and partners.
- Coaching and Development activities consume 11% of meeting time. Only about a quarter of that time is spent in 1:1 activities.

Sales invest 20 to 35% of internal collaboration on non-sales tasks

Internal collaboration allocation within Contoso by sales role



Insights

- Sales management spend 14% of their time with Field service delivery and Product teams, which might partly be due to escalations needed to push deals through.
- Though the percentage mix of most categories might be inline with expectations, there might be opportunities to streamline and reduce the absolute volume of hours needed for internal collaboration, which is currently ranging from 13 to 30 hours per week across various roles.

1. Including Operations teams under other sales segments