Microsoft 365

Customer Focus Playbook

Use cases for Workplace Analytics

April 2021

Intended audience

Primary users

Workplace Analytics end users (project lead and analysts) that plan to explore the business values and/or kick off analysis project(s) in this topic area

Note: Playbook content is designed for users with a basic level of understanding in Workplace Analytics

Workplace Analytics service delivery partners that plan to deliver service engagements in this topic area

Note: Partners are expected to be badged before accessing and utilizing the playbook content

Microsoft sales, external sales partners, or other users that hope to acquire an understanding of how Workplace Analytics can be utilized in this topic area

Note: This is not intended to be a "scoping document" for service offerings

Notes

- The playbook aims to showcase the art of the possible, therefore you will find the latest thinking and analysis by using Workplace Analytics data.

- This playbook provides high-level guidance and considerations to run projects and analysis. It is not intended to be a technical how-to guide. For how-to instructions, see the Workplace Analytics training resources or documentation.

Overview

Introduction provides a high-level understanding of the business values and how to use Workplace Analytics.

Use case framework uses the guiding themes and business hypotheses in this use case, along with sample analyses that can be used for research and relevant projects.

Project guidelines provides key principles and considerations in launching and managing projects, including a three-tier process of project scoping, data analysis, value creation.

Take action provides general guidance and resources to drive a successful change initiative.

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- Framework for measuring sales collaboration effectiveness
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Improving sales productivity is critical for reaching revenue goals

79%
of companies believe improving productivity of existing salespeople is a top driver for reaching higher revenue goals

$24,000
is the annual cost per person for a typical organization to increase sales productivity

49%
of companies have limited means to measure sales productivity

Understanding 'quality of time spent' and 'networks' of salespeople are key to optimizing effectiveness

> " We do all kinds of analytics around sales data and a lot of other pieces of information. What if we start bringing that same amount of rigor to **how people spend time.**
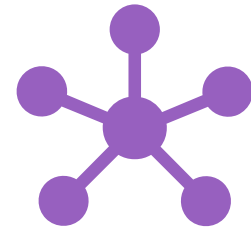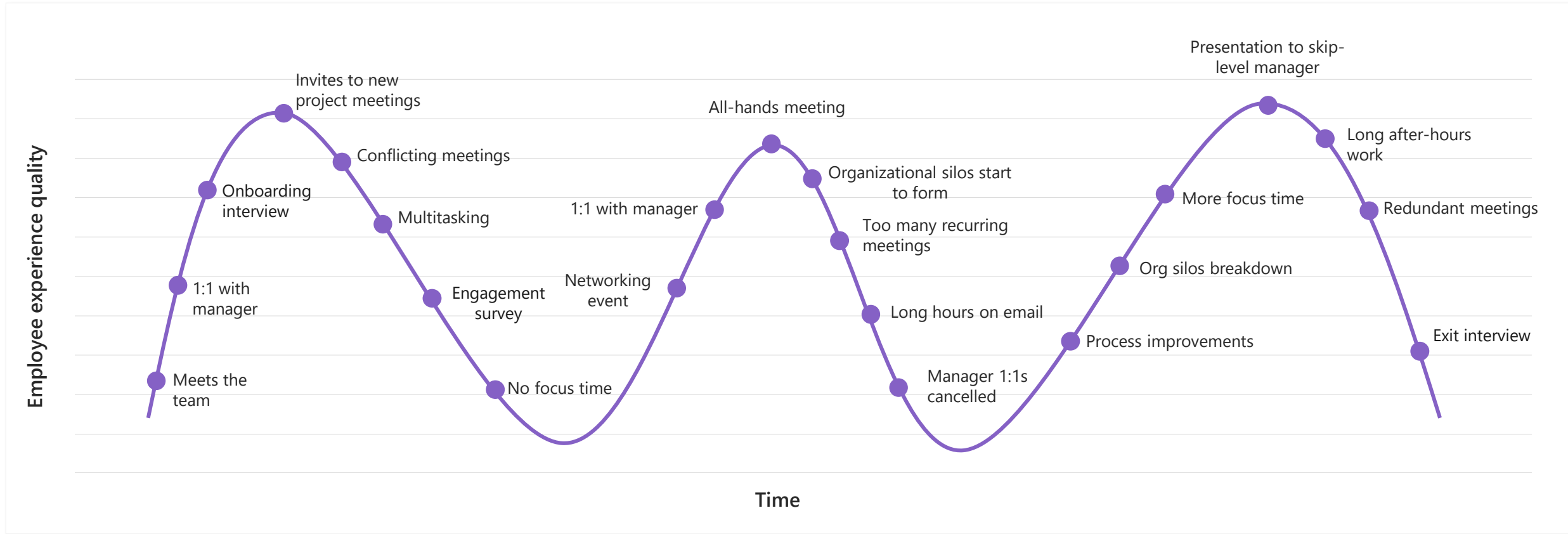>
> – *Satya Nadella,*
> *CEO, Microsoft*

Time spent in collaboration

Networks

Workplace Analytics reveals what could not be seen before

Employee experience quality (vertical axis) vs Time (horizontal axis)

- Meets the team
- 1:1 with manager
- Onboarding interview
- Invites to new project meetings
- Conflicting meetings
- Multitasking
- Engagement survey
- No focus time
- Networking event
- 1:1 with manager
- All-hands meeting
- Organizational silos start to form
- Too many recurring meetings
- Long hours on email
- Manager 1:1s cancelled
- Process improvements
- Org silos breakdown
- More focus time
- Presentation to skip-level manager
- Long after-hours work
- Redundant meetings
- Exit interview

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

+

Business context

Overlay of org descriptors and business outcomes reveals patterns of success

+

Control and governance

Flexible privacy and compliance controls help you protect your data

=

Insights and change

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

While this playbook focuses on sales, the methodology and analysis can also be applied to other external-facing functions

Sales

- Are the salespeople spending enough time with customers?

- Are we investing the right time and resources with the right accounts?

- How do internal employees collaborate to ensure success?

Procurement and supplier management

- How much time are we spending with suppliers?

- Are certain suppliers consuming a significant number of resources?

- How has supplier relationships shifted throughout time?

Business development

- How many external parties have we approached and how much time are we spending with them?

- Are we spending enough time with high-value external parties?

- Do we have good returns on our investments?

Marketing

- How much time are we spending with marketing and media partners?

- Are we engaging the right partners at the right time (such as events and product launches)?

- Do employees have enough time to focus on internal and individual tasks?

▲
Key focus of this playbook

Microsoft 365 Insights help drive sales productivity

Digital footprints reveal how work gets done to help business leaders make better business decisions

Sales leaders ask

- What do our top salespeople do differently in terms of collaboration?
- Are we spending the most time with the best revenue opportunities?
- How are internal processes inhibiting time with customers?
- Are salespeople effectively leveraging internally resources?

How we help

- Quantify collaboration patterns of top salespeople.
- Map collaboration time as compared to revenue potential.
- See how much time is spent across various processes.
- Visualize relationship within the organizational network.

How organizations benefit

- Increased sales revenue:
  - Better individual performance
  - Allocation of more time to higher potential opportunities
  - Increased exposure to valuable sources of sales support and customer insight
- Reduced sales cycles:
  - More time with customers due to less time spent on low-value processes
  - Improve responsiveness by bringing relevant internal resources more quickly

Research shows

Harvard Business Review Top 3 behaviors that drive successful salespeople[1]

- ✓ Time with customer
- ✓ Leverage internal network
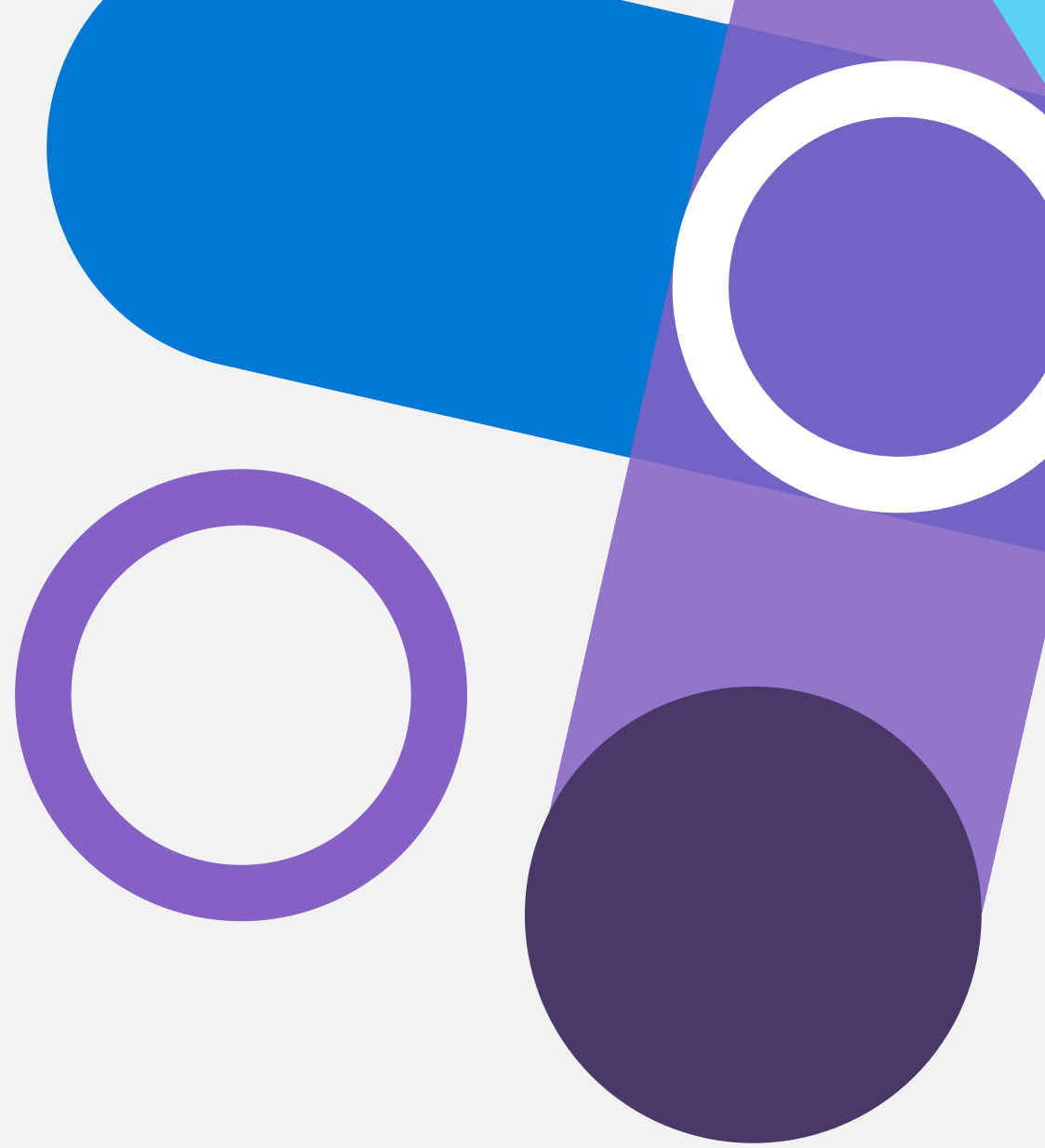- ✓ Connect with leadership

BAIN & COMPANY ◔

The Analytics of Sales Time Well Spent

Is Your Sales Organization a House Divided?

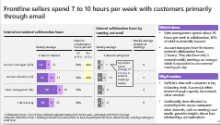1 3 Behaviors That Drive Successful Salespeople

Framework

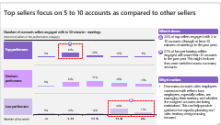# What type of collaboration ensures sales effectiveness (customer focus)?

External collaboration
Spend more time with the best customer opportunities

Sales effectiveness (customer focus)

Internal collaboration
Get the right support without internal hurdles

Coaching and onboarding
Build knowledge and skills for success

Key modules and questions

External collaboration

Subtopic	Sample analysis (click to expand)	Business hypothesis	Why does it matter?
External time allocation		Are external-facing employees spending most of their time with customers or external parties?	Time allocated to external parties across communication channels, such as meetings, emails, might indicate employees' preference and surface insights about how relationships are maintained.
Account portfolio management		External-facing employees, especially sales, usually have a portfolio to manage. How many accounts do they talk to?	How many accounts sales employees connected with reflects how employees, especially sellers, are managing their territory and portfolios, and whether the assigned accounts are being maintained. This information can provide guidance for capacity planning and sales territory design.
Teams model		How do internal employees team up to ensure successful customer relationship management and value generation?	Constructing the right team based on account types enables effective account communication and productive internal collaboration. This view provides insights on how sales employees by role or level work together to generate sales and maintain account relationship.
External contact analysis		How many external individuals do our employees usually talk to, and are they the right customer contacts (decision maker)?	Locating and maintaining relationship with the right external contacts, based on the nature of the product or services of your organization, leads to effective sales conversations.
CRM augmentation		Is our CRM database up-to-date on account and contact information?	An up-to-date CRM database is usually the foundation to effective sales planning, projection and coaching conversations. Given the remote work environment, an accurate database is even more critical for keeping the team informed and the operations running smoothly.

Require advanced data science capability to export data from Workplace Analytics

Key modules and questions

Internal collaboration

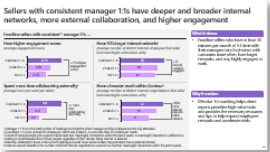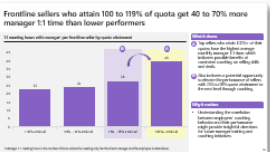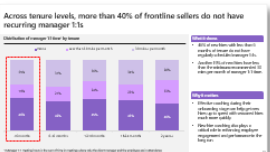| Subtopic	Sample analysis (click to expand)	Business hypothesis	Why does it matter?	
Cross-team collaboration		How are teams collaborating on internal activities?	The proportion of time consumed with internal employees determines how much remaining capacity sales employees have to connect with external customers, generate leads, and secure deals. Effective internal communication patterns provide more time for external value creation while maintaining sufficient internal support and connections.	
Internal Meeting culture		What's the meeting pattern for external facing employees on internal activities?	Meetings become a significant part of employees' daily collaboration, especially since remote work. Meetings that are in the right size and length promote efficient communication and accelerates decision-making. Longer or larger internal meetings sometime drain up employees' energy and leave them limited capacity for external activities.	*Research shows* *How to know if there are too many people in your meeting* *The Condensed Guide to Running Meetings*
Topic analysis		What topics do internal teams usually discuss, and is the time allocation across topics reasonable?	Employees time allocation across business topics (such as product, training, and administrative) indicates how topic-based interactions and processes are constructed. Releasing capacity from unnecessary collaboration and investing in high-value activities can further improve employees' productivity and engagement.	*See Operational Effectiveness Playbook*
Process analysis		How are employees spending time in a specific process, and how to further streamline the process?	Streamlining internal processes that appear to be lengthy and redundant can further free up employee capacity and leave room for more external-facing value creation activities.	*See Operational Effectiveness Playbook*

Key modules and questions in customer focus use case

Coaching and onboarding

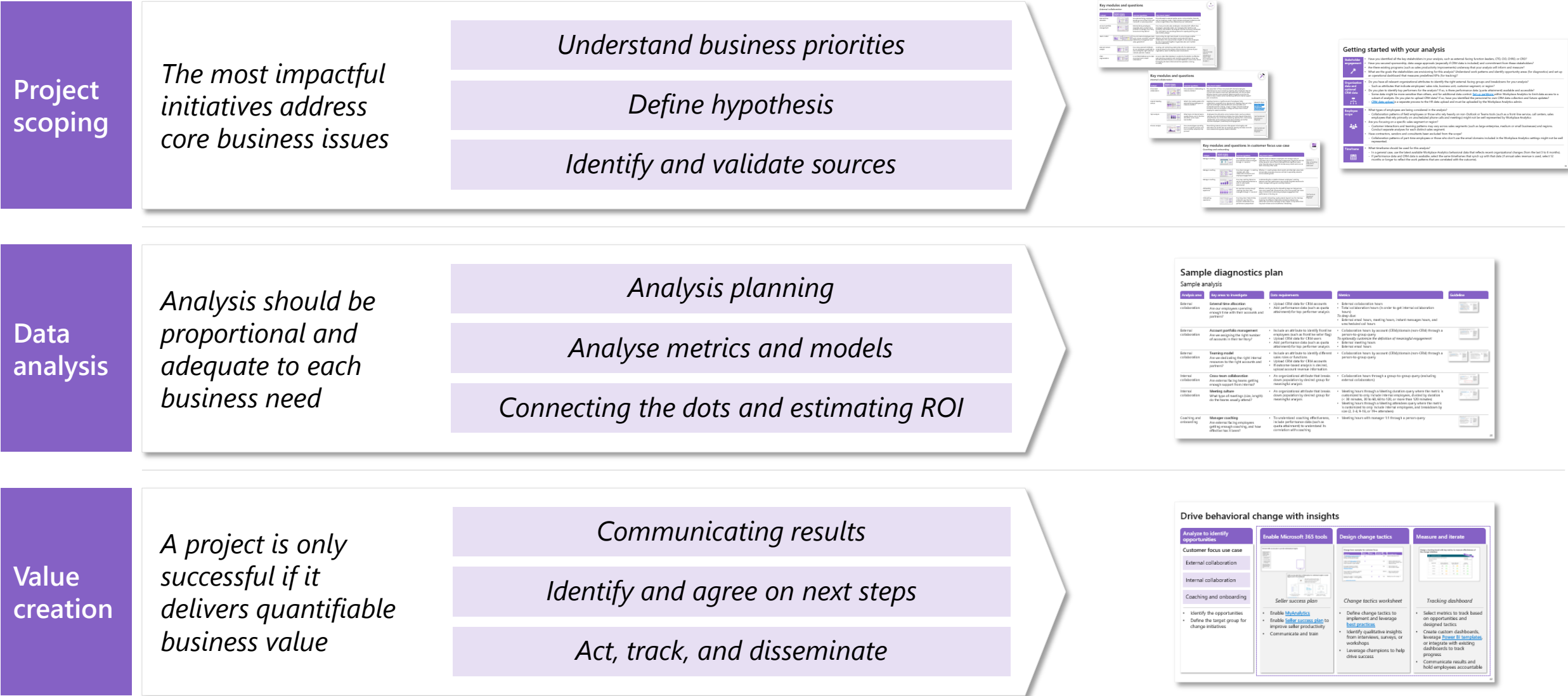| Subtopic	Sample analysis (click to expand)	Business hypothesis	Why does it matter?	
Manager coaching		Do employees spend enough time with their direct managers through 1:1 sessions?	Regular check-ins between employees and managers play an important role in driving employee engagement, alignment and role clarity. Research shows these meetings provide significant value when they take place at least 60 minutes every month and occur at least once every other week.	*Available in Ways of working assessment dashboard*
Manager coaching		How does manager 1:1 coaching correlate with other collaboration behaviors and employee engagement?	Effective 1:1 coaching helps direct reports prioritize high-value tasks and provides necessary resources and tips in expanding networks and accelerating deals.	
Manager coaching		How may coaching behaviors vary by employee performance (such as sales quota attainment)?	Understanding the correlation between employees' coaching behavior and their performance may provide insightful directions for future manager training and coaching initiatives.	
Onboarding experience		Do new hires receive enough coaching time from their managers through 1:1 sessions?	Effective coaching during the onboarding stage can help get new hires up to speed with seasoned hires much more quickly and it also plays a critical role in enhancing employee engagement and performance in the long run.	*See Employee Experience Playbook*
Onboarding experience		How long does it take to fully onboard a new hire from business collaboration and performance perspectives?	A successful onboarding usually extends beyond new hire trainings. Exploring the different collaboration behaviors between top performers and other employees brings insights on key factors that may lead to faster and more effective onboarding.	

Project guidelines

Create value with data-backed initiative

Tiered process to identify value-add opportunities, deliver high-quality analysis, and drive decision making

Project scoping

The most impactful initiatives address core business issues

- Understand business priorities
- Define hypothesis
- Identify and validate sources

Data analysis

Analysis should be proportional and adequate to each business need

- Analysis planning
- Analyse metrics and models
- Connecting the dots and estimating ROI

Value creation

A project is only successful if it delivers quantifiable business value

- Communicating results
- Identify and agree on next steps
- Act, track, and disseminate

Getting started with your analysis

Stakeholder engagement

- Have you identified all the key stakeholders in your analysis, such as external-facing function leaders, CTO, CIO, CHRO, or CRO?
- Have you secured sponsorship, data usage approvals (especially if CRM data is included) and commitment from these stakeholders?
- Are there existing programs (such as sales productivity improvements) underway that your analysis will inform and measure?
- What are the goals the stakeholders are envisioning for this analysis? Understand work patterns and identify opportunity areas (for diagnostics) and set up an operational dashboard that measures predefined KPIs (for tracking)?

Organization data and optional CRM data

- Do you have all relevant organizational attributes to identify the right external-facing groups and breakdowns for your analysis?
  - Such as attributes that indicate employees' sales role, business unit, customer segment, or region?
- Do you plan to identify top performers for the analysis? If so, is there performance data (quota attainment) available and accessible?
  - Some data might be more sensitive than others, and for additional data control. Set up partitions within Workplace Analytics to limit data access to a subset of analysts. Do you plan to upload CRM data? If so, have you identified the personnel to own CRM data collection and future updates?
  - CRM data upload is a separate process to the HR data upload and must be uploaded by the Workplace Analytics admin.

Employee scope

- What types of employees are being considered in the analysis?
  - Collaboration patterns of field employees or those who rely heavily on non-Outlook or Teams tools (such as a front-line service, call centers, sales employees that rely primarily on unscheduled phone calls and meetings) might not be well represented by Workplace Analytics
- Are you focusing on a specific sales segment or region?
  - Customer interactions and teaming patterns may vary across sales segments (such as large enterprise, medium or small businesses) and regions. Conduct separate analyses for each distinct sales segment.
- Have contractors, vendors and consultants been excluded from the scope?
  - Collaboration patterns of part-time employees or those who don't use the email domains included in the Workplace Analytics settings might not be well represented.

Timeframe

- What timeframe should be used for this analysis?
  - In a general case, use the latest available Workplace Analytics behavioral data that reflects recent organizational changes (from the last 3 to 6 months).
  - If performance data and CRM data is available, select the same timeframes that synch up with that data (if annual sales revenue is used, select 12 months or longer to reflect the work patterns that are correlated with the outcome).

The following additional data fields are typically helpful to the analysis

Include these attribute types but are not limited to them:

| | Organizational attribute | Outcome-based attribute | CRM attribute (Sales) |

Attribute	Example	Application
Job title	Sales rep, Account executive, or Sales engineer	• Identify role-based work patterns • Understand teaming models with external parties
Region	Global: APAC, EMEA, or NA U.S: East, South, or West	• Understand region-specific work patterns and cross-region collaborations
Segment or category	Customer segment: strategic or enterprise Supplier category: tier 1 or tier 2	• Identify segment-based work patterns • Compare collaboration models across segments
Employee performance	Sales quota attainment: below quota, meet quota, or exceed quota	• Identify top performers and consolidate top performer behaviors
Account segment *(CRM account table)*	Strategic, enterprise, or small to medium sized businesses (SMB)	• Understand account-based interactions by segment
Account revenue data *(CRM account table)*	Annual, quarterly, or monthly sales revenue ($) Year-to-date sales revenue ($)	• Understand the correlation between collaboration and outcome to evaluate the return of investment (ROI)
Account opportunity Data *(CRM account table)*	Account potential revenue ($)	• Understand the correlation between current collaboration behaviors and account potential
Account parent name *(CRM account table)*	If applicable, parent company that the CRM accounts roll up to - For example, Contoso U.S., Contoso India, and Contoso Japan all roll up to Contoso Corp	• Understand the consolidated investment and ROI in key parent accounts, usually the strategic accounts

See Prepare and upload CRM data in Workplace Analytics for details

Sample diagnostics plan

Sample analysis

Analysis area	Key areas to investigate	Data requirements	Metrics	Guideline
External collaboration	**External time allocation** Are our employees spending enough time with their accounts and partners?	• Upload CRM data for CRM accounts • Add performance data (such as quota attainment) for top performer analysis	• External collaboration hours • Total collaboration hours (in order to get internal collaboration hours) *To deep dive:* • External email hours, meeting hours, instant messages hours, and unscheduled call hours	
External collaboration	**Account portfolio management** Are we assigning the right number of accounts in their territory?	• Include an attribute to identify frontline employees (such as frontline seller flag) • Upload CRM data for CRM users • Add performance data (such as quota attainment) for top performer analysis	• Collaboration hours by account (CRM)/domain (non-CRM) through a person-to-group query *To optionally customize the definition of meaningful engagement:* • External meeting hours • External email hours	
External collaboration	**Teaming model** Are we dedicating the right internal resources to the right accounts and partners?	• Include an attribute to identify different sales roles or functions • Upload CRM data for CRM accounts • If outcome-based analysis is desired, upload account revenue information	• Collaboration hours by account (CRM)/domain (non-CRM) through a person-to-group query	
Internal collaboration	**Cross-team collaboration** Are external facing teams getting enough support from internal?	• An organizational attribute that breaks down population by desired group for meaningful analysis	• Collaboration hours through a group-to-group query (excluding external collaborators)	
Internal collaboration	**Meeting culture** What type of meetings (size, length) do the teams usually attend?	• An organizational attribute that breaks down population by desired group for meaningful analysis	• Meeting hours through a Meeting duration query where the metric is customized to only include internal employees, divided by duration (< 30 minutes, 30 to 60, 60 to 120, or more than 120 minutes) • Meeting hours through a Meeting attendees query where the metric is customized to only include internal employees, and breakdown by size (2, 3-8, 9-18, or 19+ attendees)	
Coaching and onboarding	**Manager coaching** Are external facing employees getting enough coaching, and how effective has it been?	• To understand coaching effectiveness, include performance data (such as quota attainment) to understand its correlation with coaching	• Meeting hours with manager 1:1 through a person query	

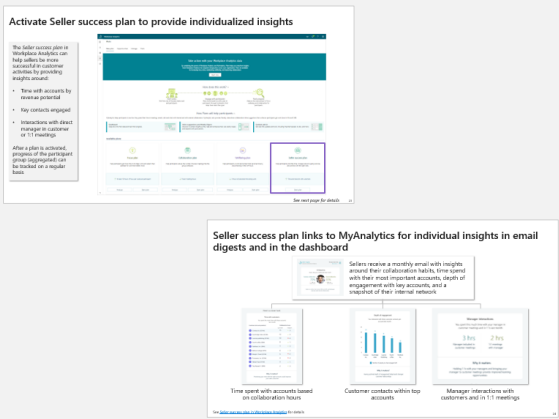# Take action

Drive behavioral change with insights

Analyze to identify opportunities

Customer focus use case

External collaboration

Internal collaboration

Coaching and onboarding

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

Enable Microsoft 365 tools

Seller success plan

- Enable MyAnalytics
- Enable Seller success plan to improve seller productivity
- Communicate and train

Design change tactics

Change tactics worksheet

- Define change tactics to implement and leverage best practices
- Identify qualitative insights from interviews, surveys, or workshops
- Leverage champions to help drive success

Measure and iterate
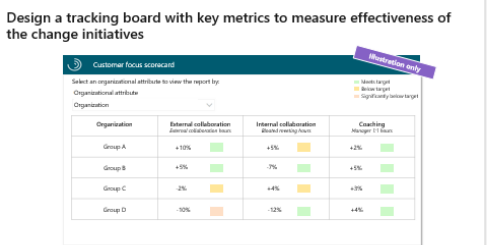
Tracking dashboard

- Select metrics to track based on opportunities and designed tactics
- Create custom dashboards, leverage Power BI templates, or integrate with existing dashboards to track progress
- Communicate results and hold employees accountable

Activate Seller success plan to provide individualized insights

The *Seller success plan* in Workplace Analytics can help sellers be more successful in customer activities by providing insights around:

- Time with accounts by revenue potential

- Key contacts engaged

- Interactions with direct manager in customer or 1:1 meetings

After a plan is activated, progress of the participant group (aggregated) can be tracked on a regular basis

Seller success plan links to MyAnalytics for individual insights in email digests and in the dashboard
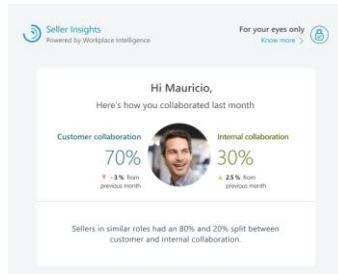
Sellers receive a monthly email with insights around their collaboration habits, time spend with their most important accounts, depth of engagement with key accounts, and a snapshot of their internal network
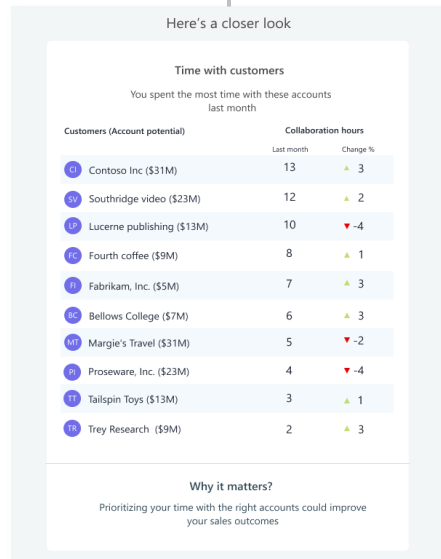
Time spent with accounts based on collaboration hours
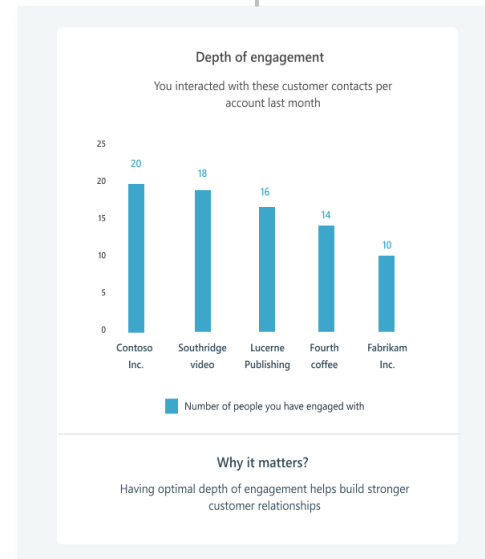
Customer contacts within top accounts
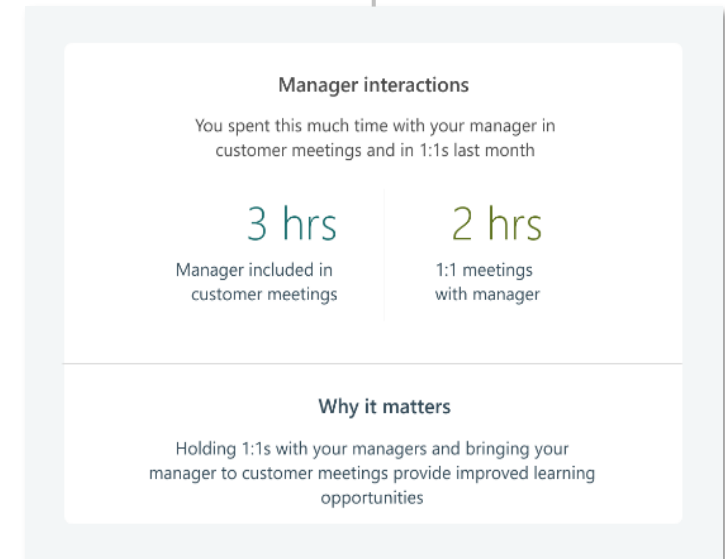
Manager interactions with customers and in 1:1 meetings
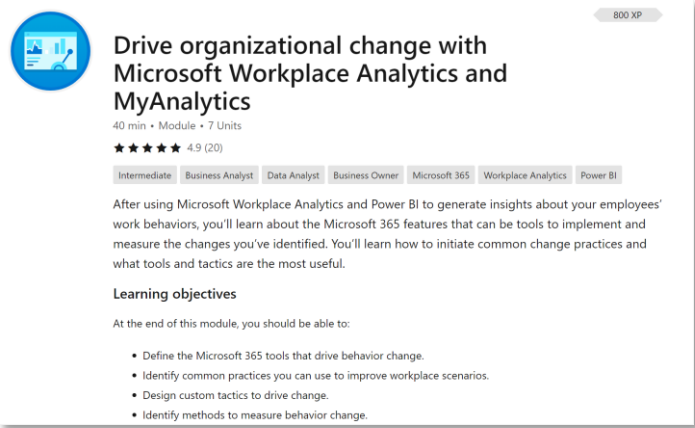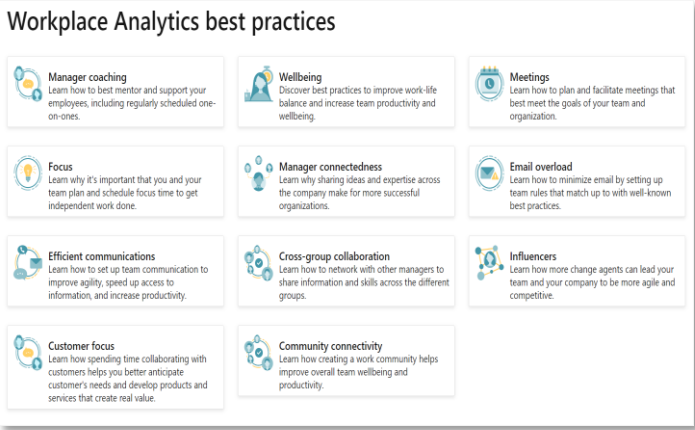
Change lever examples for customer focus

Change lever	External collaboration	Internal collaboration	Coaching and onboarding	Effort	Accountability metrics
Use MyAnalytics Important people list to enable immediate notifications and reminders for key external contacts	✖			Low	External collaboration hours
Create a shared Teams channel with key customers for direct, informal chats and prompt responses to urgent requests	✖			Low	• External collaboration hours • External instant messages hours • External call hours
Encourage employees to maintain diversified internal networks using MyAnalytics Network		✖		Low	• Internal network size • Internal network breadth
Free up capacity by conducting a quarterly meeting audit to reassess the need for recurring meetings		✖		Medium	• Recurring meeting hours • Bloated meeting hours
Enhance the manager 1:1 practice through MyAnalytics manager 1:1 inline suggestions		✖	✖	Low	Meeting hours with manager 1:1

Source: Workplace Analytics best practices

Design a tracking board with key metrics to measure effectiveness of the change initiatives

Customer focus scorecard

Select an organizational attribute to view the report by:

Organizational attribute

Organization ⌄

- 🟩 Meets target
- 🟨 Below target
- 🟧 Significantly below target

Organization	External collaboration *External collaboration hours*		Internal collaboration *Bloated meeting hours*		Coaching *Manager 1:1 hours*	
Group A	+10%	🟩	+5%	🟨	+2%	🟩
Group B	+5%	🟩	-7%	🟩	+5%	🟩
Group C	-2%	🟨	+4%	🟨	+3%	🟩
Group D	-10%	🟧	-12%	🟩	+4%	🟩

Resources for more change initiation and management information

Resource	Description
[Drive organizational change with Microsoft Workplace Analytics and MyAnalytics](#)	An online, self-paced Microsoft Learn module that helps you understand: 1) Microsoft 365 tools that can help drive change 2) Common change practices and tactics
[Workplace Analytics best practices](#)	Provides best practices and changes strategies for specific business outcomes

Appendix:
Analysis guidelines
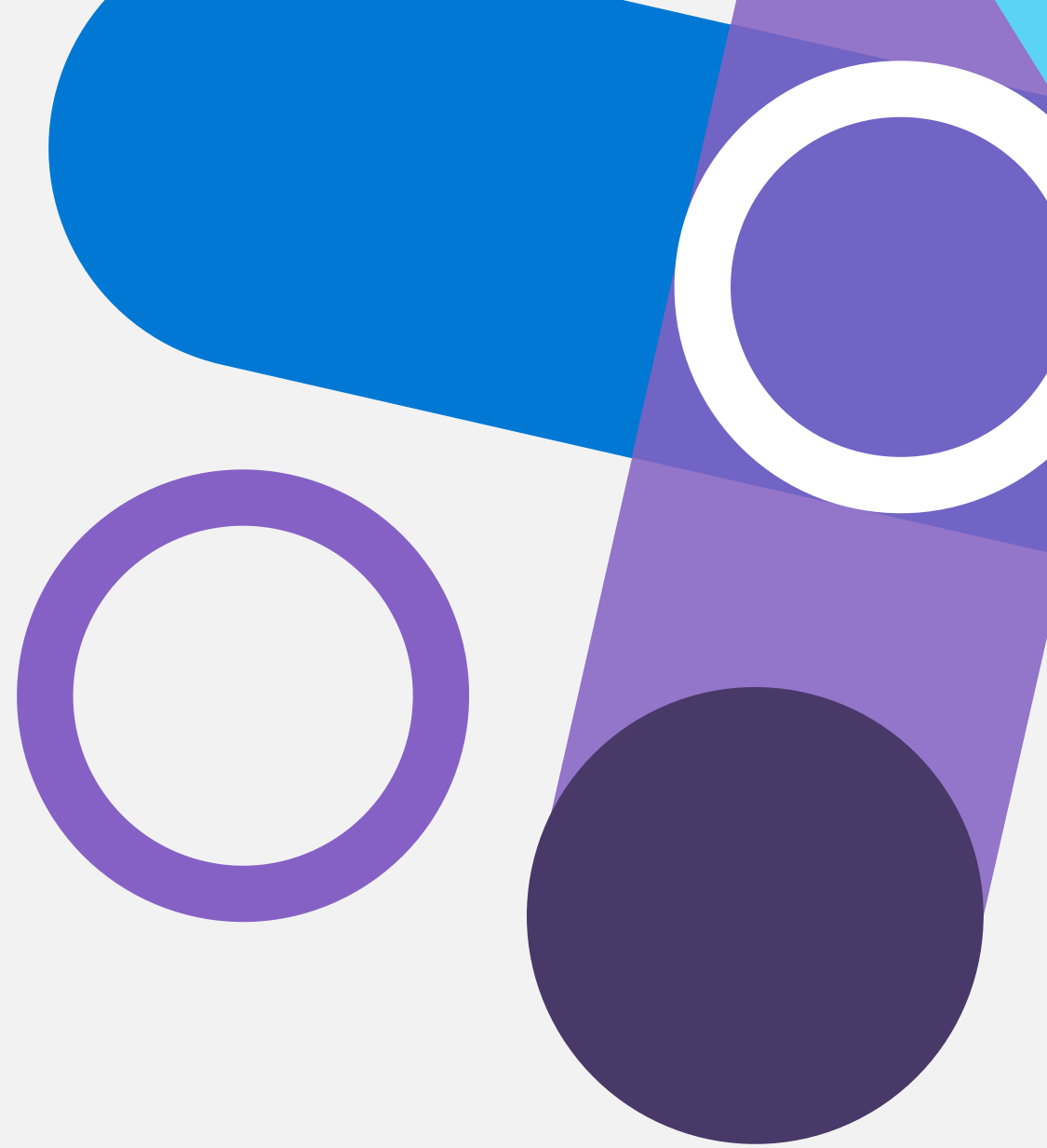
Use a person-to-group query for CRM and non-CRM users

Use a **person-to-group** query for analysis that captures account-based (CRM) or domain-based (non-CRM) collaboration

Apart from other customizations based on your analysis needs, here are some basic setups in the person-to-group query that ensure a meaningful query result:

1 In "Their collaborators" section, "*Do you want to exclude any collaborators?*"
- Exclude all internal employees to ensure a meaningful time allocation to external parties
- Add the filter: Employee's "IsInternal = True"

2 In "Their collaborators" section, "*How do you want to group the people who collaborated with the time investors?*"
- For CRM users: select "AccountName" as the grouping criteria
- For non-CRM users: select "Domain" as the grouping criteria

Illustration of the person-to-group query concept

Employee A → Account X (CRM) or Domain X (non-CRM)
Account Y (CRM) or Domain Y (non-CRM)
Account Z (CRM) or Domain Z (non-CRM)

For details, see CRM queries in Workplace Analytics
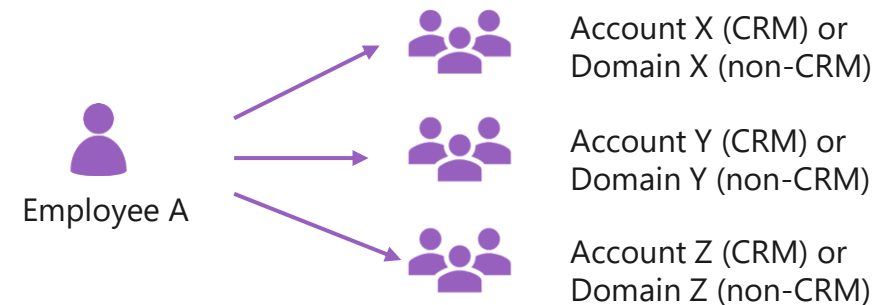
External time allocation: How much time do external facing employees spend with external parties?

To create custom analysis with Workplace Analytics queries:

- Create a person query and include the following metrics.
  - External collaboration hours
  - Collaboration hours (to calculate *internal collaboration hours* by subtracting external collaboration hours from this metric)
  - *Optional*, for collaboration channel deep dives: External meeting hours, External email hours, External instant messages hours, and External unscheduled call hours[1]

- For CRM users that plan to identify CRM-specific collaborations (as a subset of total external collaboration hours), open a person-to-group query and include the Collaboration hours metric. See Create a person-to-group query for how-to instructions.

- For top performer analysis, upload performance data (such as sales quota attainment) ahead of time and identify top performer group by adding another grouping value in your analysis tool.

Click to expand

What to examine:

- How much collaboration time (in both percentage and absolute hours) is allocated to external parties?

- How does that compare to employees in different sales group or job levels?

- How do they allocate time across multiple channels (email, meeting, Teams), and do they have enough face time with the external parties?

1 To get unscheduled call hours, customize "call hours" metric where scheduled call equals **False**

Account portfolio management: How many external parties do employees engage with on a regular basis?

To create custom analysis with Workplace Analytics queries:

- Create a person-to-group query and add the **Collaboration hours** metric. See [Create a person-to-group query](#) for how-to instructions.

- Consider breaking employees down by number buckets of external parties they (meaningfully) engaged with for insights on territory management.

- For top performer analysis, upload performance data (such as sales quota attainment) ahead of time and identify top performer group by adding another grouping value in your analysis tool.

Click to expand

What to examine:

- How many external parties do employees, especially the frontline sellers, connect with regularly, and how many of those do employees engage deeply (such as have more or longer interactions)?

- How does the number compare with the organization's current strategy in territory management?

Engagement model: How do internal employees team up in external interactions?

To create custom analysis with Workplace Analytics queries:

- Create a person-to-group query and add the **Collaboration hours** metric. See [Create a person-to-group query](#) for how-to instructions.

- Include an organizational attribute (such as sales role or title) as employee grouping criteria for the average team mix.

- Regroup the collaboration hours spent by each employee group by the account group that identifies the average team mix for each account group.
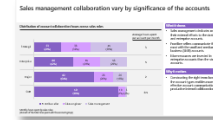
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What to examine:

- How does the relative time spent by different roles or levels with the external parties compare across account or sales groups?

- Are they inline with the expected engagement model based on nature of the account or sales groups?

Engagement model: Are we investing resources in the right external parties?

To create custom analysis with Workplace Analytics queries:

- Follow the guidance in the previous page (engagement model) to identify the team mix based on collaboration hours; make sure to include outcome data (such as account revenue) for the ROI analysis.

- Leverage your analysis to identify the coverage of each engagement model within the account groups and highlight the top three with the highest account coverage.

- Identify the total collaboration hours of the top engagement models and use outcome data to calculate the ROI.

- Review the engagement models with low ROI and investigate further the effectiveness of those models.

- Identify the models that generated high ROI and study the feasibility of replicating the models for effective sales conversations.
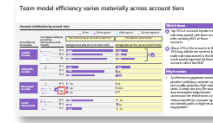
Click to expand

What to examine:

- Whether the ROI for a particular engagement model meets the expectation? For example, are we investing too many internal resources on low-value accounts, and too few resources on strategic accounts?

Internal Collaboration: How are the internal teams collaborating?

To create custom analysis in Workplace Analytics:

- Create a [group-to-group query](#) and add the Collaboration hours metric.

- Identify the right grouping attributes for "time investors" and "their collaborators."

- In "Their collaborators" section, exclude any non-internal collaborators for more accurate internal collaboration data.

  – Exclude Employee's "IsInternal equals False"
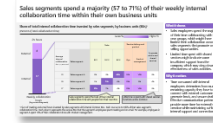
Click to expand

What to examine:

- How do sales or external-facing groups allocate their time across other internal functions and groups?

- Are some group interactions greater or smaller than expected? For example, are the external-facing groups getting enough support from shared service groups (such as IT or HR)?

Internal meeting culture: What are the internal meeting patterns?

To create custom analysis with Workplace Analytics:

- Create a [Meetings duration query and Meetings attendees query](#) in the query template section for the analysis

- In *each* metric listed in the query templates, add a filter where "*all attendee's IsInternal = True*" to focus on internal only meetings

Click to expand

What to examine:

- How much of the employees' internal meeting time is spent in extra long (2+ hours) or extra large (19+ attendees) meetings?

- Which groups adopt shorter sprints in meetings and potentially have best practices to learn from?

Manager coaching: Are employees getting enough manager 1:1 time and how effective has it been?

- See [Ways of working assessment](#) for how to analyze data in Power BI

- Or create a person query and include the **Meeting hours with manager 1:1** metric to replicate the dashboard visual

Click to expand

To understand how manager 1:1 time might be impacting the employees' collaboration patterns and engagement, select the metrics your organization wants to explore, and bring in outcome data to identify top performer best practices. Metrics and outcome data include but are not limited to the following:

- *Collaboration metrics* - Internal network size and breadth, External network size and breadth, and External collaboration hours

- *Outcome data* - Engagement survey score* and employees' performance data* (such as quota attainment)
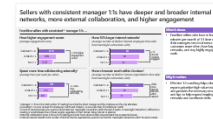
Click to expand
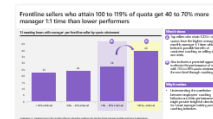
Click to expand

What to examine:

- How many employees do not have regular manager 1:1 sessions at all?

- How are the manager 1:1 time correlating with the collaboration metrics, for example, external collaboration hours, external and internal networks?

* Requires an additional data upload in Workplace Analytics

Appendix:
Analysis examples

Frontline sellers spend 7 to 10 hours per week with customers primarily through email

Internal and external collaboration hours[1]

	Weekly average		External collaboration hours percent	
	Internal — External		All sellers	Top sellers
Account managers (260)	14 / 7	21	34%	**40%**
Account directors (26)	17 / 10	27	39%	**40%**
Sales management (84)	30 / 8	38	21%	
Total average	18 / 8	26	30%	
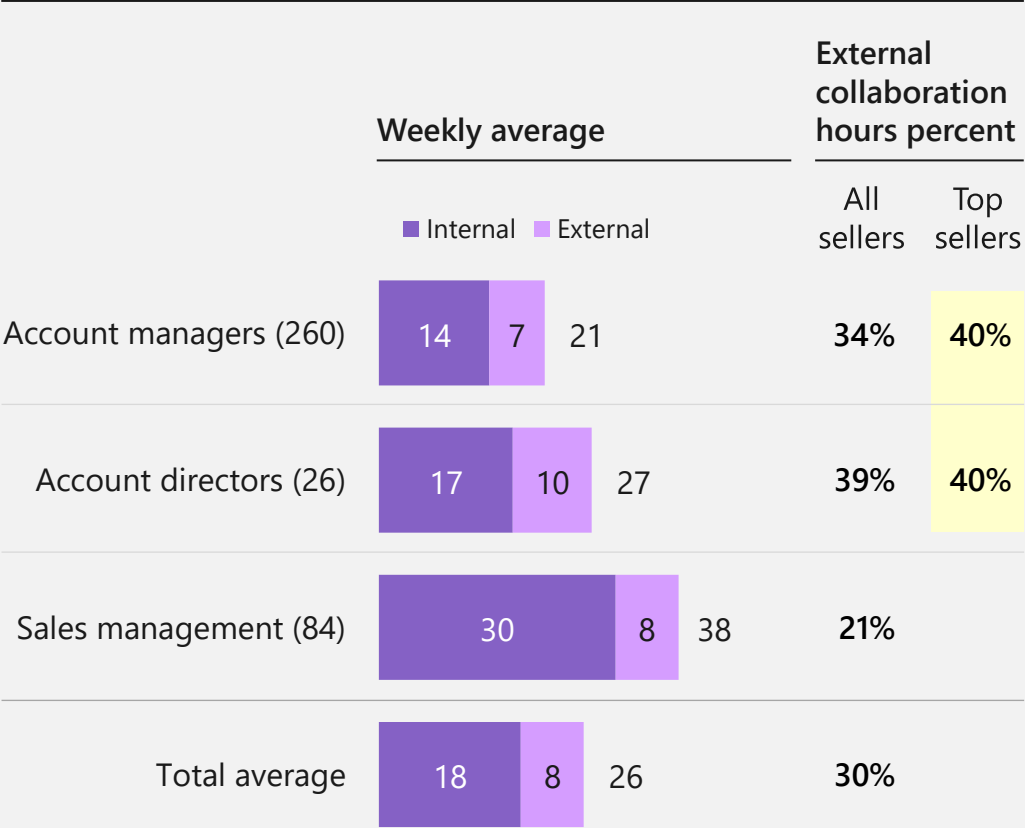
External collaboration hours by meeting and email

	Weekly average		Weekly average of external meetings
	External meeting hours		
	3 / 4	7	5
	5 / 5	10	7
	5 / 3	8	9
	4 / 4	8	6

> Top sellers spend average of **5 hours** in external meetings weekly
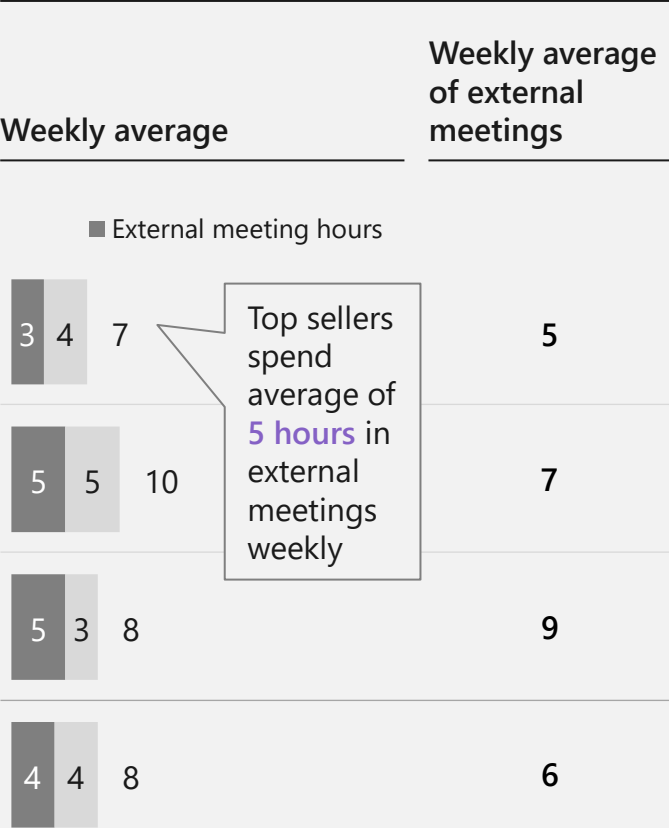
What it shows

- Sales management spends about 38 hours per week in collaboration, 80% of which is internally focused.

- Account managers have the lowest external collaboration hours (7 hours). They also have only 5 external weekly meetings on average, which is *equivalent to one external meeting per day.*

Why it matters

- Sufficient time with customers is key to landing deals. Successful sellers reserve enough capacity for external value creation.

- Additionally, time allocated to external parties across communication channels, such as meetings and emails, provides insights about how relationships are maintained.

1 Collaboration hours = Sum of every individual's adjusted meeting hours for the week + estimated email time for the week
2 External collaboration hours = Meeting and email hours where there's at least one participant that has an external domain, including meeting and email hours

Top sellers focus on 5 to 10 accounts as compared to other sellers

Number of accounts sellers engaged with in 30-minute+ meetings

(Percent of sellers in the performance category)

Top performers

9% A 53% 20% 10% 8%

Medium performers

8% 24% 31% 20% 16%

Low performers

9% 10% 14% B 50% 17%

Number of accounts   <5   5-10   11-15   15-20   20+
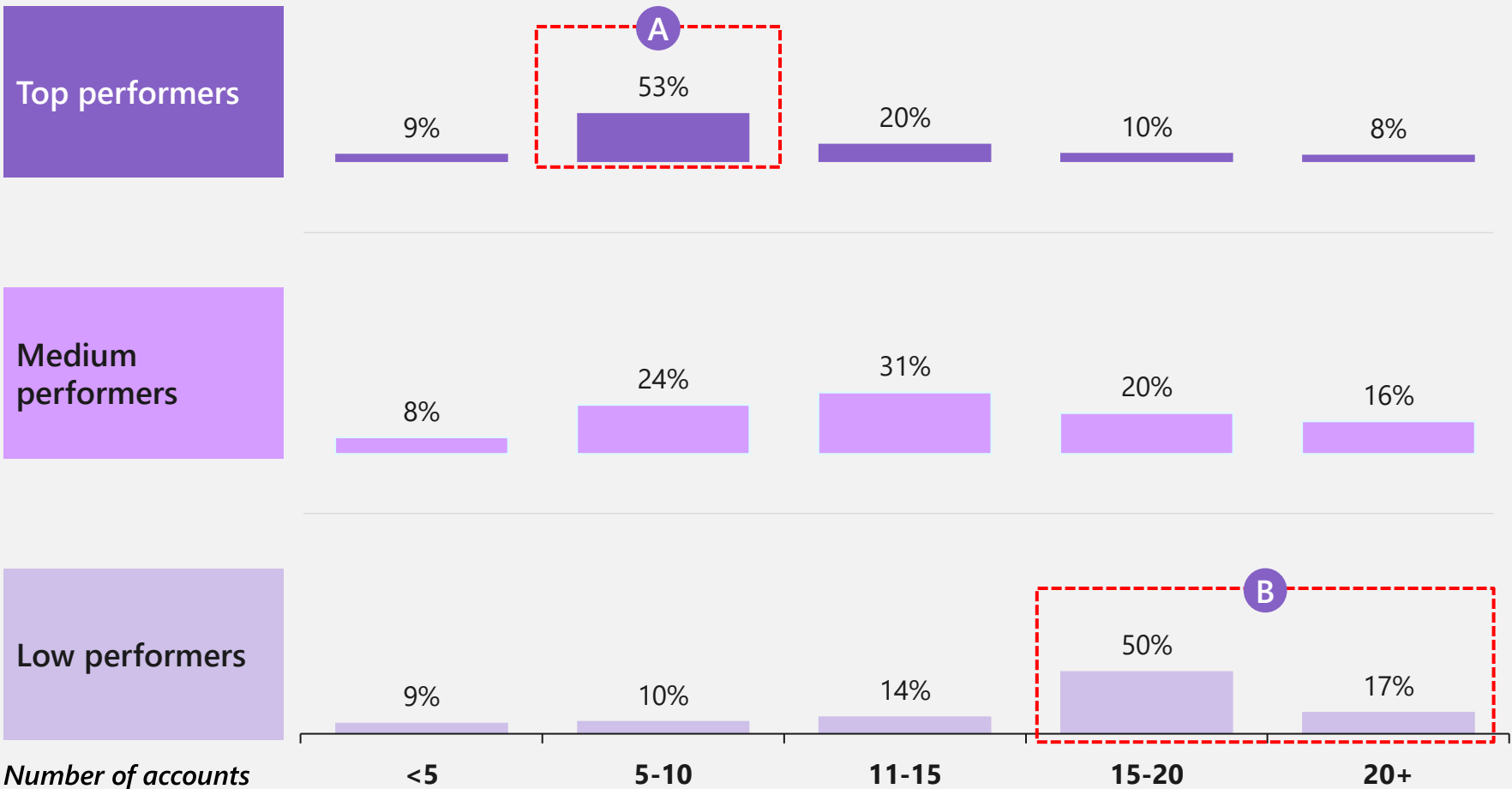
What it shows

A 53% of top sellers engaged with 5 to 10 accounts (through at least 30 minutes of meetings in the past year).

B 67% of low performing sellers engaged with more than 15 accounts in the past year. This might indicate they were stretched across too many accounts.

Why it matters

- How many accounts sales employees connected with reflects how employees, especially sellers, are managing their territory, and whether the assigned accounts are being maintained. This can help provide guidance for capacity planning and sales territory design moving forward.

Sales management collaboration vary by significance of the accounts

Distribution of account collaboration hours across sales roles

				Average hours spent per account per month
Strategic	33 (29%)	36 (32%)	45 (39%)	3
Enterprise	80 (42%)	55 (29%)	56 (29%)	5
Major	82 (64%)	26 (20%)	20 (16%)	2
SMB	121 (90%)	10 (7%)	3 (2%)	0.5

■ Frontline seller   ■ Sales engineer   ■ Sales management
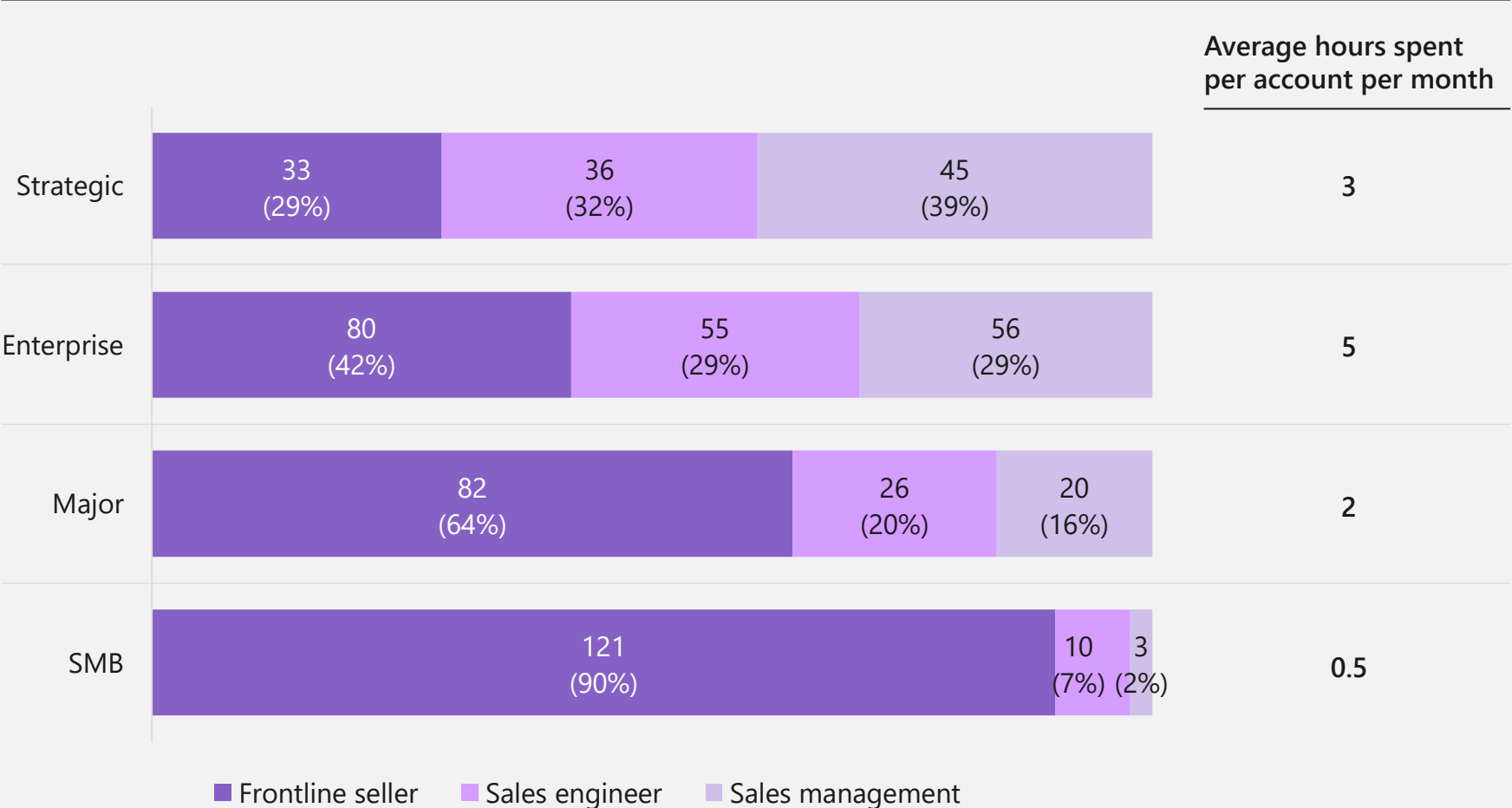
Monthly hours spent by sales roles
(Percent of the total time spent with the account group)

What it shows

- Sales management dedicates most of their external efforts to the strategic and enterprise accounts.

- Frontline sellers communicate the most with the small and medium business (SMB) accounts.

- More resources are invested in enterprise accounts than the strategic accounts.

Why it matters

- Constructing the right team based on the account types enables more effective account communication and productive internal collaboration.

Team model efficiency varies materially across account tiers

Account distribution by annual sales

Account tier by annual sales	Top 3 team models per account tier (Percent of accounts covered)		How much sales value can each model drive?	How efficient is each model?
			Average annual sales per account per model	**Average sales per hour per account and model**

👤 Sellers 👤 Sales engineer 👤 Other support 👤 Sales management

Top 10% accounts
- 55% — 648K — 19K
- 25% — 502K — 18K } **A**
- 5% — 561K — 30K

Middle 80% accounts
- 37% — 16K — 24K
- 15% — 52K — 2K
- 13% — 39K — 10K

10% long tail accounts
- 46% — .3K — .6K
- **B** 13% — .4K — 0.01K
- 9% — .3K — .1K

Top 50 new accounts
- 24% — 36K — .5K
- 18% — 6K — 3K
- 16% — 21K — 2K

What it shows

A Top 10% of accounts require a multi-role team model, with three or more roles servicing 85% of those accounts.

B About 22% of the accounts in the 10% long tail tier are serviced by a multi-role team model. Is this high touch model expected for these accounts with a low ROI?

Why it matters

- An effective engagement model provides satisfying customer support and usually generates high value deals. A deep-dive into the return of time investment helps leaders understand the effectiveness of various models by customer types and identify paths to high-return engagement.

Are we spending enough time with account contacts in leadership roles?

Contact type breakdown by account
Number of contacts by role

Account name	Number of contacts by account based on contact roles	Average hours invested in customer leaders per month
Account X	4 4 5 13	2.1
Account Y	2 4 2 8	1.1
Account Z	1 5 3 9	0.4
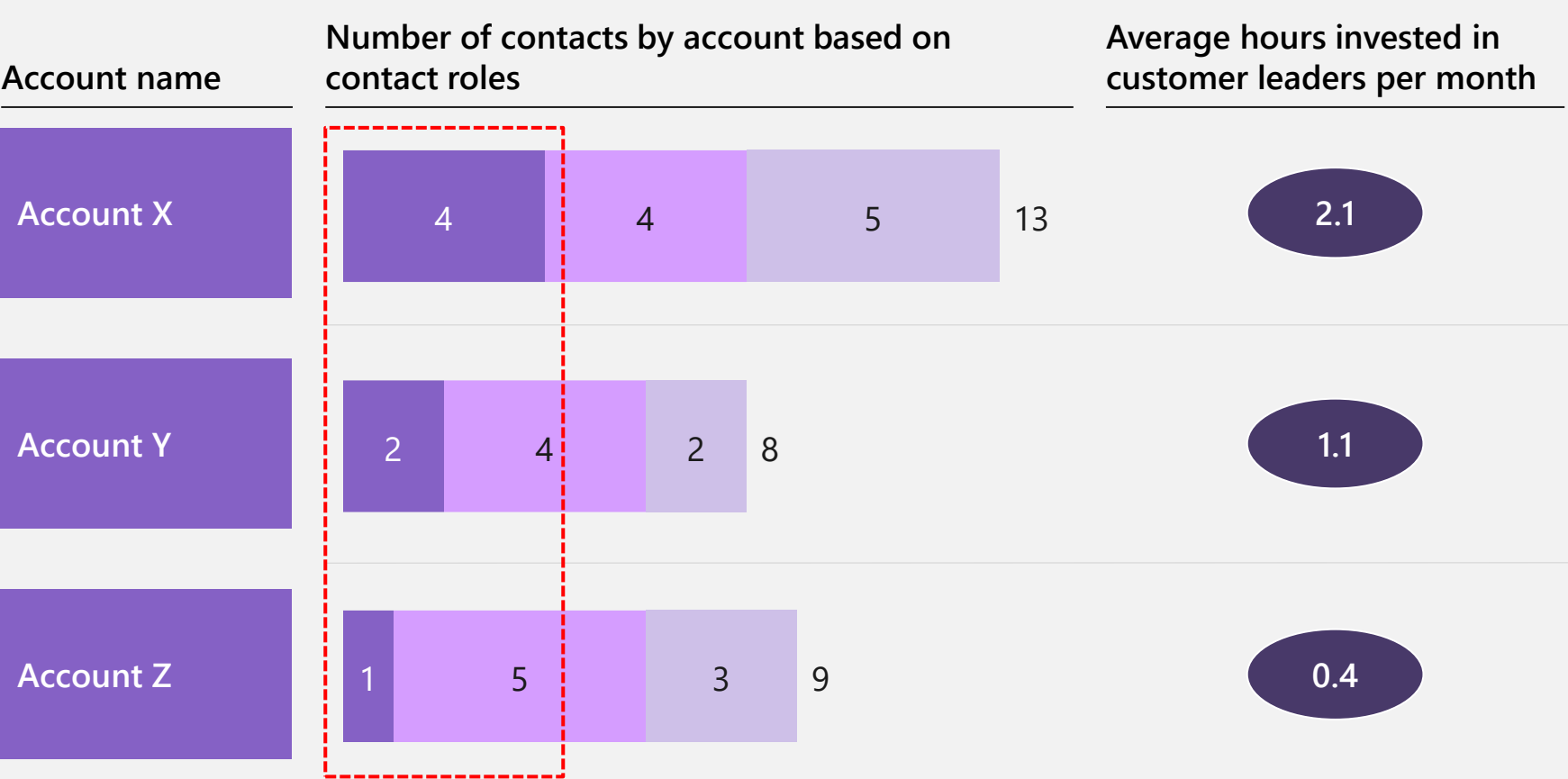
■ Business leaders   ■ IT services   ■ Business development

What it shows

- Sellers at Account X were able to locate and engage with four key contacts that are likely in decision-making roles.

- An average of 2.1 hours were invested in business leaders at Account X every month as compared to 0.4 hours in Account Z, who is also a strategic customer.

Why it matters

- Locating and maintaining relationships with the right external contacts, especially those in leadership roles and are decision makers, leads to more effective sales conversations.

Less than 20% of contacts that sellers interact with get logged in CRM

Account distribution by annual sales
Percent of total collaboration hours invested by key sales roles

Account tier by annual sales	Number of contacts interacted with by account and type of contact	Percent of CRM contacts per account	Average hours invested per contact per account
Tier 1 accounts	4 / 4 / 17 → 25	16%	1.6
Tier 2 accounts	2 / 4 / 7 → 13	15%	0.5
Tier 3 accounts	2 / 4 / 7 → 13	15%	0.4
Top 50 new accounts	4 / 5 / 11 → 20	20%	1.3

■ Contacts in CRM   ■ Non-CRM contacts tagged along in meetings or cc'd in emails with CRM contacts
■ Non-CRM contacts who were not involved in activities related to CRM contacts

- Only 15% of the account contacts that sellers interacted with are logged in CRM. This indicates an opportunity to audit and update CRM.

- Sellers talk to almost double the contacts in Tier 1 accounts as compared to the Tier 2 and Tier 3 accounts.

Why it matters

- An up-to-date CRM database is usually the foundation to effective sales planning, projection, and coaching conversations. Given the remote work environment, an accurate database is even more critical for keeping the team informed and the operations running smoothly.

Sales segments spend a majority (57 to 71%) of their weekly internal collaboration time within their own business units

Share of total internal collaboration time invested by sales segments, by business units (BUs)[1]
(Percent of total collaboration time)

Weekly collaboration hours
(Avg across all segments)

- 25 hours total
- External: 8
- Internal: 17

Lower % ◼◼◼◼ Higher %

Average internal collaboration *hours, per week*	Sales segment	Sales			Service delivery and product		Corporate admin and shared services
		BU 1	BU 2	BU 3	Ops	Product management	
19	Sales segment A	2%	3%	69%	13%	10%	3%
18	Sales segment B	1%	71%	6%	10%	8%	4%
17	Sales segment C	57%	7%	4%	19%	10%	3%

> Sales segments spend the bulk of their internal collaboration time with people from their own BUs

> Little time is spent with shared services functions across Contoso

1 Sum of meeting and email hours invested by sales segments with internal Contoso BUs. Each row sums to 100% of that sales segment's collaboration time. Each column represents the various BUs that the segment's employees spent meeting and on email. For example, employees in segment A spent 10% of their collaboration time with Product management.

What it shows

- Sales employees spend the majority of their time collaborating with their own groups, which might have limited their collaboration across sales segments that promote cross-selling opportunities.
- Limited time spent with shared services might indicate some insufficient support from the company, which may drag down effectiveness of sales activities.

Why it matters

- Time consumed with internal employees determines how much remaining capacity they have to connect with external customers, generate leads, and secure deals. Effective communication patterns provide more time for external value creation while maintaining sufficient internal support and connections.

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Top sellers differ from other sellers by spending less time in large and long meetings

Time in meetings by meeting size and length buckets

(Percent of total time in meetings)

Number of attendees

- ■ 18+ attendees
- ■ 9-18 attendees
- □ Top Seller (dashed red)
- ■ 3-8 attendees
- ■ 2 attendees
- Ⓧ x% PP difference

	Top account managers		Other account managers	Account directors	Sales management
18+ attendees	25%	7%	33%	22%	24%
9-18 attendees	18%	-2%	16%	18%	18%
3-8 attendees	33%	-8%	25%	30%	35%
2 attendees	25%	1%	26%	30%	22%

Length of meeting

- ■ >4 hours
- ■ 2-4 hours
- ■ 1-2 hours
- ■ 30 mins - 1 hour
- □ < 30 mins

	Top account managers		Other account managers	Account directors	Sales management
>4 hours	5%	5%	3%	4%	3%
2-4 hours	7%		14%	9%	7%
1-2 hours	17%	6%	23%	19%	16%
30 mins - 1 hour	29%	0%	29%	29%	34%
< 30 mins	42%	-11%	31%	39%	40%

What it shows

- Top account managers focus their time in shorter, more intimate meetings:
  - Less time in meetings with 18+ attendees (25% as compared to 33%) and more in meetings with 3 to 8 attendees
  - 11% more time in short (less than 30 minutes long) meetings than other sellers

Why it matters

- Meetings become a significant part of employees' daily collaboration, especially with a shift to remote work.

- Meetings that are the right size and length promote more efficient communication and can accelerate decision making.

1 Internal meeting hours is the sum of all individuals' adjusted meeting hours for the week where all participants are internal to the organization.

Rhythm of business, post-sales support, and admin meetings consume more than half of sellers' internal collaboration time

Internal meeting time allocation by key topic categories

Internal meeting subject category and keyword examples[1]

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 business: weekly, monthly, review, update

Product, sales prep, post-sales support: (customer name), (product brand) prospecting, maintenance

	Account manager	Account director	Sales management
Extracurricular	2%	5%	4%
Admin and Operations	5%	5%	5%
Info sharing, coaching, and training	10%	13%	19%
Rhythm of business	31%	36%	41%
Product, sales prep, post-sales support	52%	41%	30%

Average internal meeting hour per week

Account manager	Account director	Sales management
6	5	12

What it shows

- 31-41% of internal hours are ROB-related.
- Management spends the largest proportion in ROB (41% of their total meeting hours).
- Training and coaching consume only 19% of sales management's internal collaboration time.

Why it matters

- Employees time allocation across business topics (such as product, training, and administrative) indicates how certain topic-based interactions and processes are constructed.

- Releasing capacity from unnecessary collaboration and investing in high-value activities can further improve employees' productivity and engagement.

1 Examples are for illustration purposes only.

Process A reaches peak collaboration in September

Collaboration hours for process A over time
Identified with the keywords in email and meeting subject lines

■ Meetings ■ Email

Total collaboration hours by month

5000
4500
4000
3500
3000
2500
2000
1500
1000
500
0

4,408 hours
Equivalent to 24
FTEs per month[1]

Target date range
Jun '19 to Feb '20

Apr 19 | May 19 | Jun 19 | Jul 19 | Aug 19 | Sep 19 | Oct 19 | Nov 19 | Dec 19 | Jan 20 | Feb 20 | Mar 20 | Apr 20 | May 20 | Jun 20 | Jul 20

1 Assumes 180 hours per month for each full-time employee (FTE).
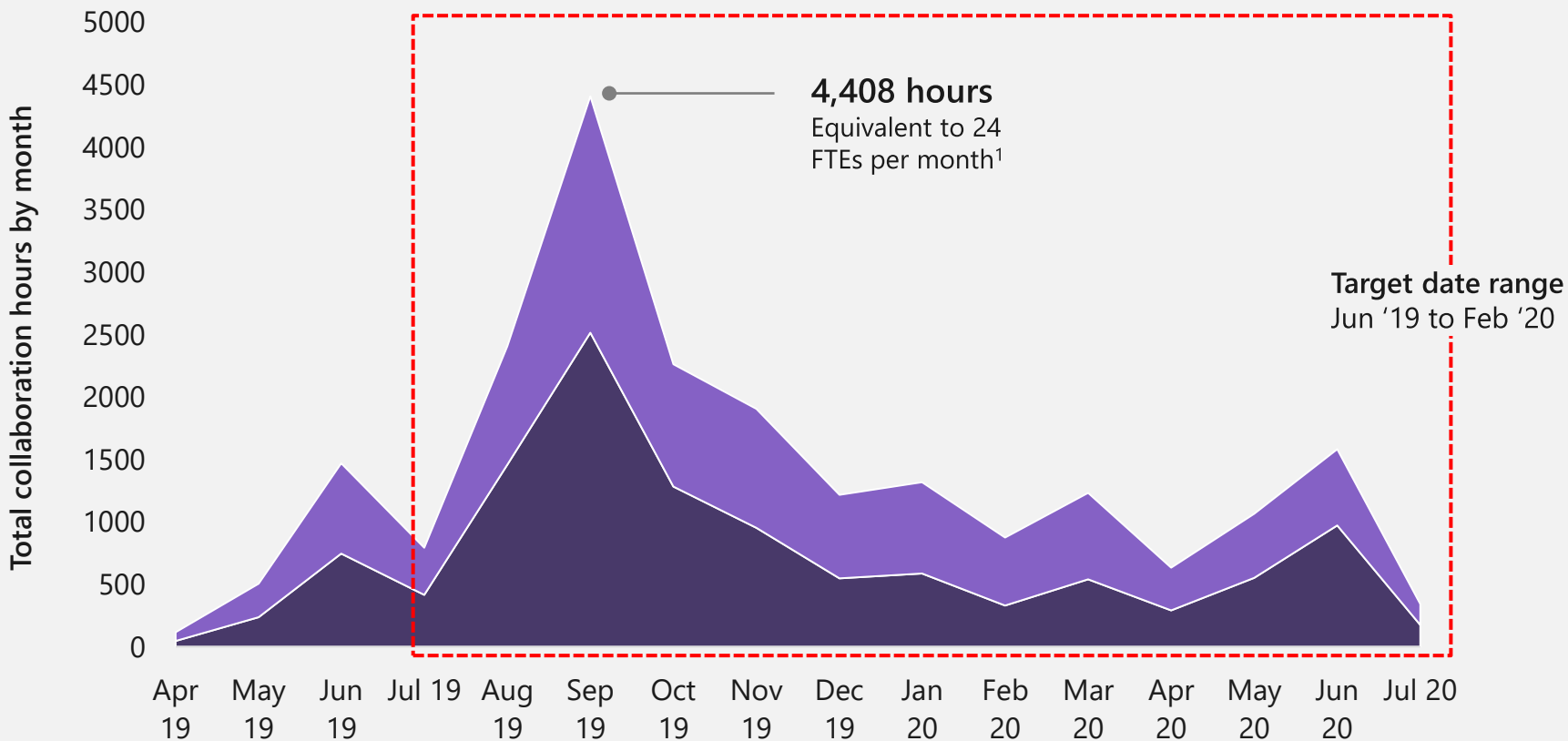
What it shows

- Efforts spent on process A extend beyond the process start date – *opportunity to review and streamline the time spent on this process before Jul 19, likely the preparation efforts to get process started.*
- Process A efforts peaked in Sep 2019, which is equivalent to a workload of 24 full-time employees for that month. *Is this as expected?*

Why it matters

- Streamlining internal processes that are lengthy and redundant can further free up employee capacity and leave room for more valuable, customer related activities.

Are employees getting sufficient manager 1:1 coaching time?

Available in the Ways of working assessment dashboard

Are employees receiving sufficient manager 1:1 coaching time?　Microsoft

SupervisorIndicator — All

Distribution of employees by weekly manager 1:1 time
Percentage of employees

● 0 min ● 1-15 min ● 16-30 min ● more than 30 min

Engineering	19% / 61% / 14%	
Sales	12% / 72% / 14%	
Operations eng...	11% / 57% / 31%	
R&D	7% / 82% / 9%	
Software Devel...	65% / 28%	
Strategy	41% / 48% / 7%	
Professional Se...	46% / 40% / 13%	
Product Manag...	57% / 43%	
Program Mana...	41% / 50% / 9%	

9% of employees spent 0 min in 1:1 with manager

60% of employees spent 1-15 min in 1:1 with manager

27% of employees spent 16-30 min in 1:1 with manager

4% of employees spent > 30 min in 1:1 with manager

Distribution of employees by manager 1:1 frequency
Percentage of employees

● Quarterly or less ● Bi-monthly ● Monthly ● Twice-monthly or more

Engineering	25% / 7% / 30% / 38%	
Sales	14% / 16% / 28% / 42%	
Operations eng...	18% / 9% / 11% / 61%	
R&D	9% / 40% / 45%	
Software Devel...	11% / 8% / 24% / 58%	
Strategy	15% / 78%	
Professional Se...	19% / 74%	
Product Manag...	10% / 17% / 67%	
Program Mana...	9% / 91%	

13% of employees met 1:1 with manager quarterly or less

8% of employees met 1:1 with manager bi-monthly

23% of employees met 1:1 with manager monthly

56% of employees met 1:1 with manager twice-monthly or more

What to examine
- (Left-side visual) What percentage of employees have no regular 1:1 time with their managers? What percentage have less than 15 mins/week?
- (Right-side visual) What percentage of employees meet with managers less than once a quarter? How about less than once a month?

Why it matters
Regular check-ins between employees and managers play an important role in driving employee engagement, alignment and role clarity. Research shows these meetings provide value when they take place for at least 15 minutes a week on average (equivalent to a 30-minute session every other week), and occur at least once every other week. The analyses above show average weekly 1:1 meeting time (left) and frequency of 1:1 meetings (right), split by organization.

What it shows

- 9% of employees don't get regular manager 1:1 time and another 60% spent less than 15 minutes per week with managers through 1:1s.
- 56% of employees met with managers 1:1 less than 6 times a year.

Why it matters

- Regular check-ins between employees and managers play an important role in driving employee engagement, alignment, and role clarity.
- Research shows these 1:1 meetings provide significant value when they occur at least 60 minutes each month and at least once every other week.

See Ways of working assessment for more details.

Sellers with consistent manager 1:1s have deeper and broader internal networks, more external collaboration, and higher engagement

Frontline sellers with consistent[1,2] manager 1:1s ...

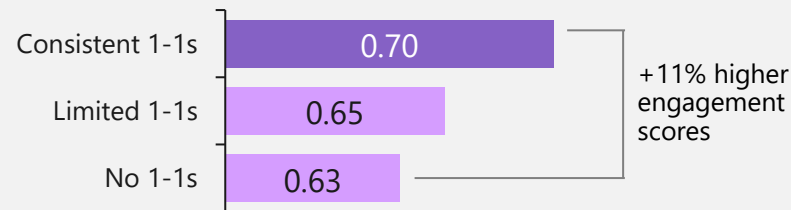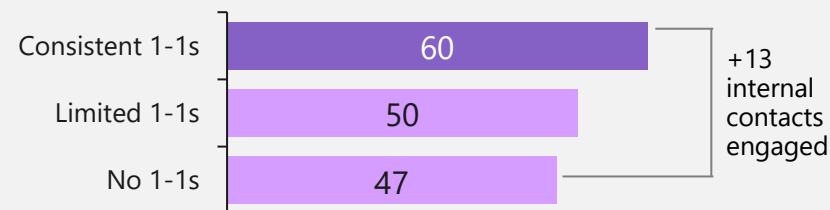### Have higher engagement scores
(Average engagement score)

Consistent 1-1s	0.70	
Limited 1-1s	0.65	
No 1-1s	0.63	

+11% higher engagement scores

Have 30% larger internal networks[3]
(Average number of distinct internal employees that seller had meaningful connections with)

Consistent 1-1s	60	
Limited 1-1s	50	
No 1-1s	47	

+13 internal contacts engaged

Spend more time collaborating externally[4]
(Average hours per week per seller)

Consistent 1-1s	9.8	
Limited 1-1s	9.0	
No 1-1s	8.6	

1+ more hour collaborating externally
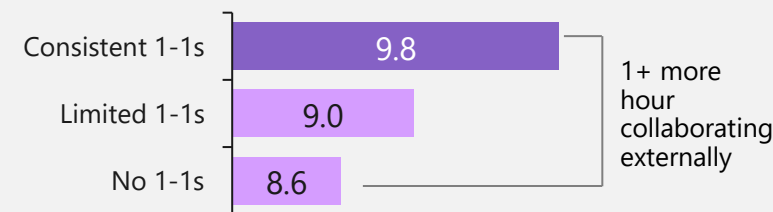
Have a broader reach within Contoso[5]
(Average number of distinct Contoso organizations that seller had meaningful connections with)

Consistent 1-1s	12	
Limited 1-1s	10	
No 1-1s	8	

+50% more internal divisions within network
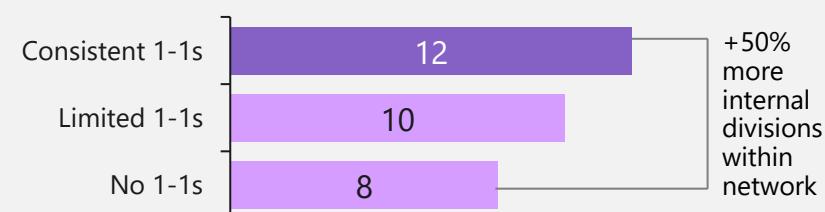
What it shows

- Frontline sellers who have at least 30 minutes per month of 1:1 time with their managers tend to interact with customers more often, have larger networks, and stay highly engaged at work.

Why it matters

- Effective 1:1 coaching helps direct reports prioritize high-value tasks and provides the necessary resources and tips to help expand employees' networks and accelerate deals.

1 Manager 1:1 time is the total number of meeting hours that the direct manager and the employee are the only attendees.
2 Consistent 1:1s occur at least 30 minutes per month and limited 1-1s occur less than 30 minutes per month.
3 Count of internal people who a person had at least two meaningful connections within the past 4 weeks. A meaningful interaction is defined as a meeting or email between five or fewer people, regardless of their domain being internal or external.
4 External collaboration hours is the sum of meeting and email hours where at least one participant has an external domain.
5 Internal network breadth is the number of distinct internal organizations a person has had two meaningful interactions within the past 4 weeks.

Frontline sellers who attain 100 to 119% of quota get 40 to 70% more manager 1:1 time than lower performers

1:1 meeting hours with manager[1] per frontline seller by quota attainment

Quota attainment	1:1 meeting hours
< 50% attained	23
50% - 74% attained	24
75% - 99% attained (B)	28
100%+ attained (A)	40

1 Manager 1:1 meeting hours is the number of hours where the meeting only has the direct manager and the employee in attendance.
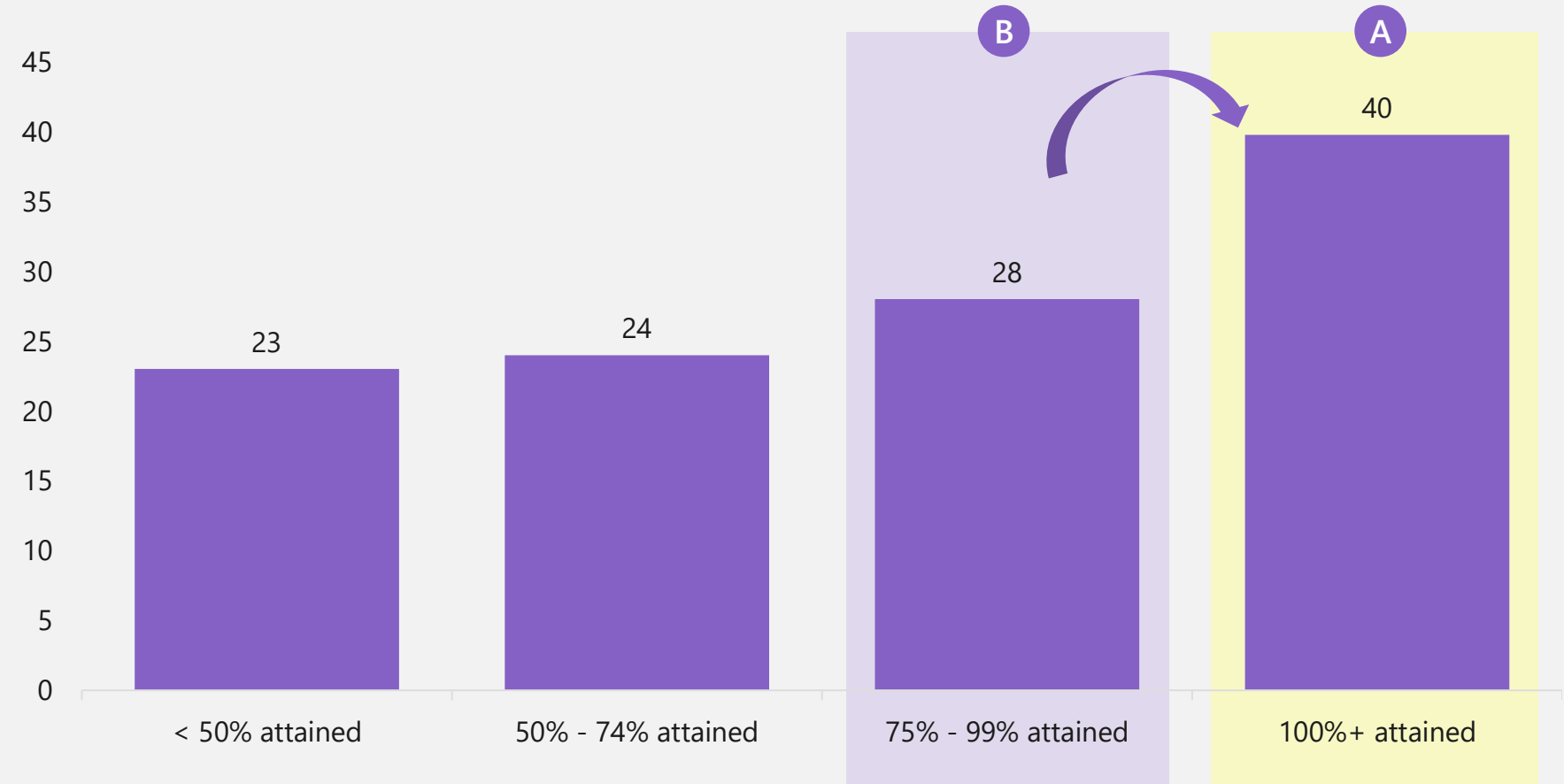
What it shows

A Top sellers who attain 100%+ of their quotas have the highest average monthly manager 1:1 time, which indicates possible benefits of consistent coaching on selling skills and deals.

B Also indicates a potential opportunity to elevate the performance of sellers with 75% to 99% quota attainment to the next level through coaching.
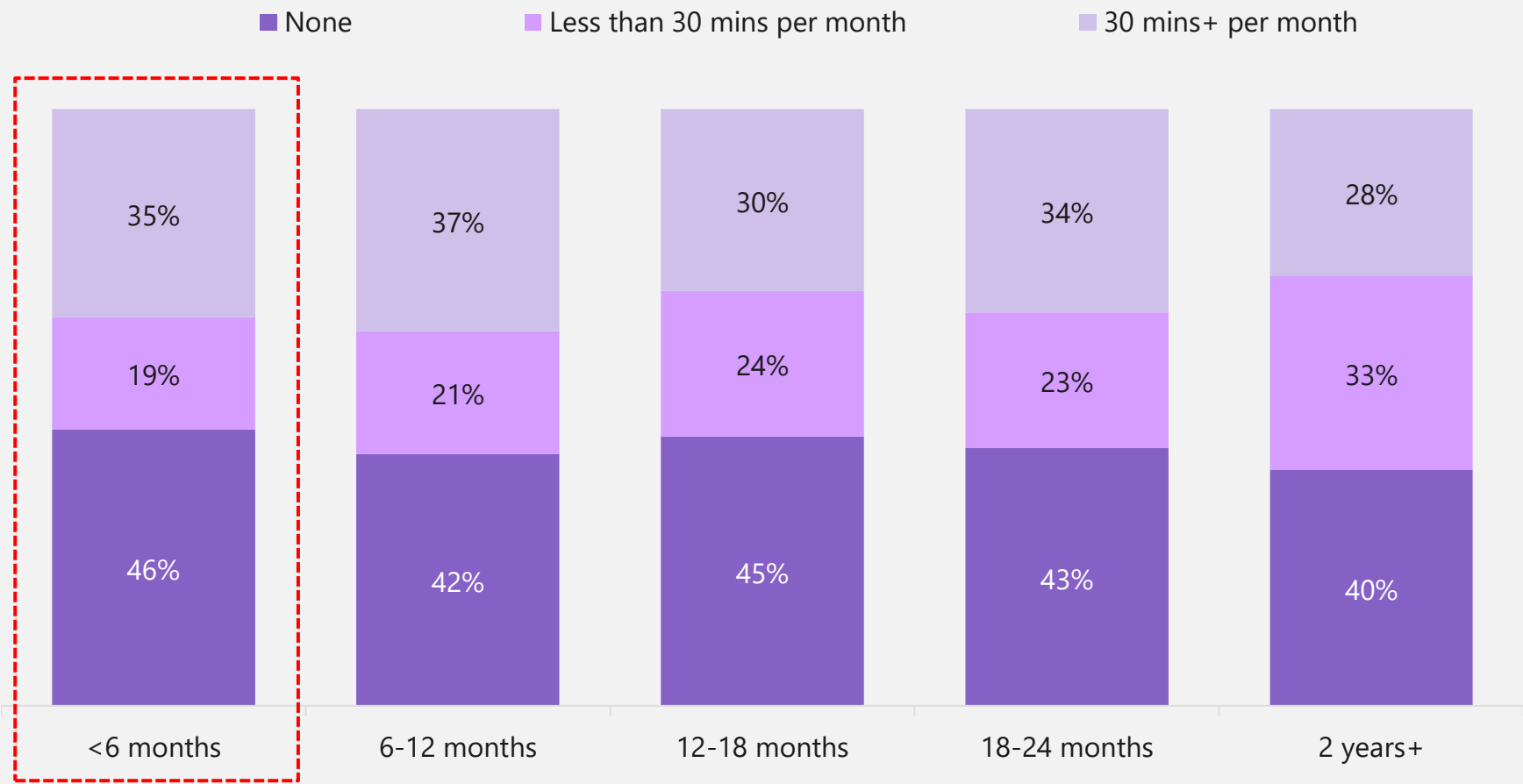
Why it matters

- Understanding the correlation between employees' coaching behavior and their performance might provide insightful directions for future manager training and coaching initiatives.

Across tenure levels, more than 40% of frontline sellers do not have recurring manager 1:1s

Distribution of manager 1:1 time[1] by tenure

- ■ None
- ■ Less than 30 mins per month
- ■ 30 mins+ per month

	<6 months	6-12 months	12-18 months	18-24 months	2 years+
30 mins+ per month	35%	37%	30%	34%	28%
Less than 30 mins per month	19%	21%	24%	23%	33%
None	46%	42%	45%	43%	40%

1 Manager 1:1 meeting hours is the sum of time in meetings where only the direct manager and the employee are in attendance.

What it shows

- 46% of new hires with less than 6 months of tenure do not have regularly scheduled manager 1:1s.

- Another 19% of new hires have less than the minimum recommended 30 mins per month of manager 1:1 time.
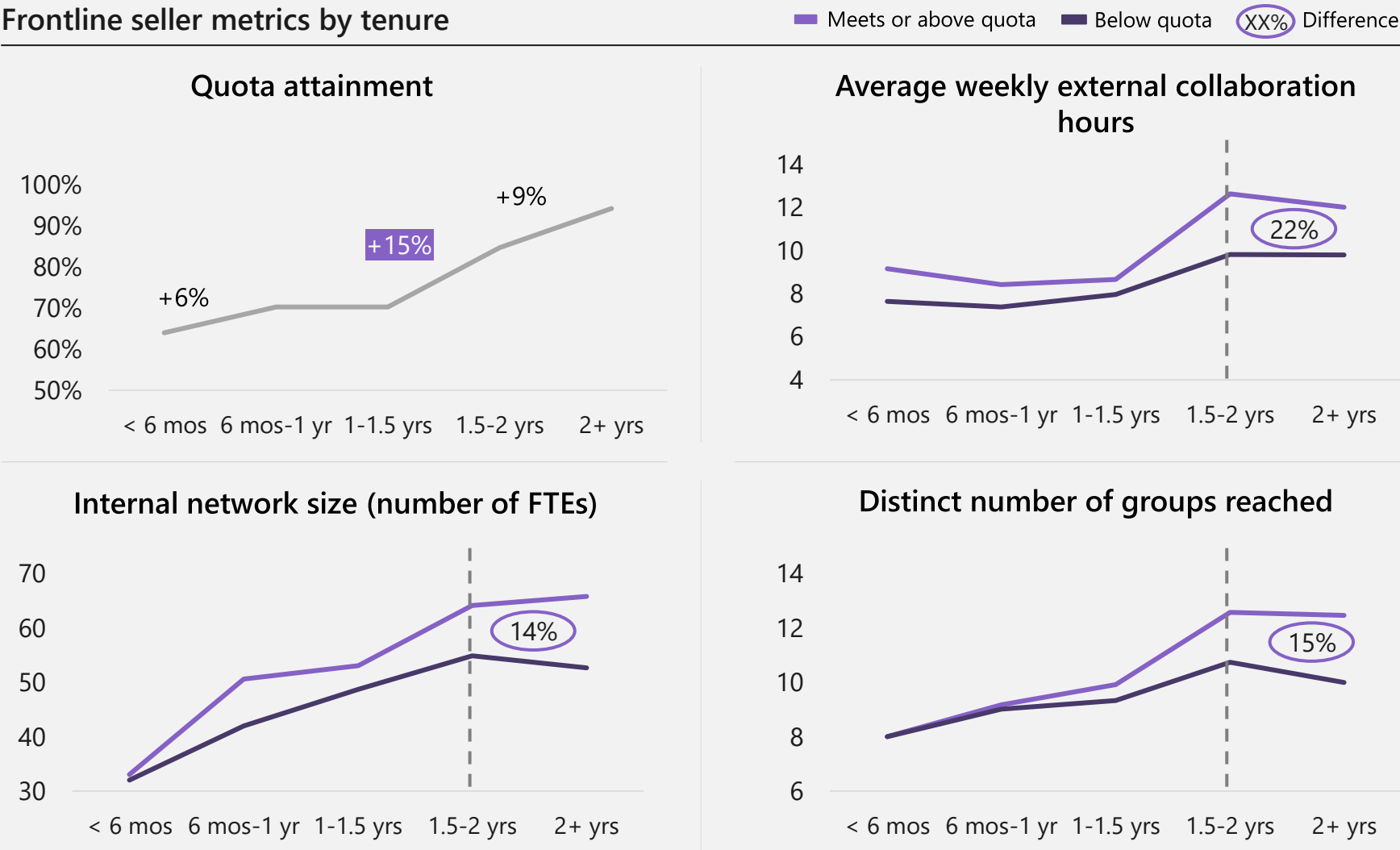
Why it matters

- Effective coaching during their onboarding stage can help get new hires up to speed with seasoned hires much more quickly.

- New hire coaching also plays a critical role in enhancing employee engagement and performance in the long run.

Quota attainment accelerates between 18 and 24 months when internal networks and external collaboration hours are high

Frontline seller metrics by tenure

Legend: ■ Meets or above quota ■ Below quota (XX%) Difference

Quota attainment

100%
90%
80%
70%
60%
50%

+6% +15% +9%

< 6 mos   6 mos-1 yr   1-1.5 yrs   1.5-2 yrs   2+ yrs

Average weekly external collaboration hours

14
12
10
8
6
4

22%

< 6 mos   6 mos-1 yr   1-1.5 yrs   1.5-2 yrs   2+ yrs

Internal network size (number of FTEs)

70
60
50
40
30

14%

< 6 mos   6 mos-1 yr   1-1.5 yrs   1.5-2 yrs   2+ yrs

Distinct number of groups reached

14
12
10
8
6

15%

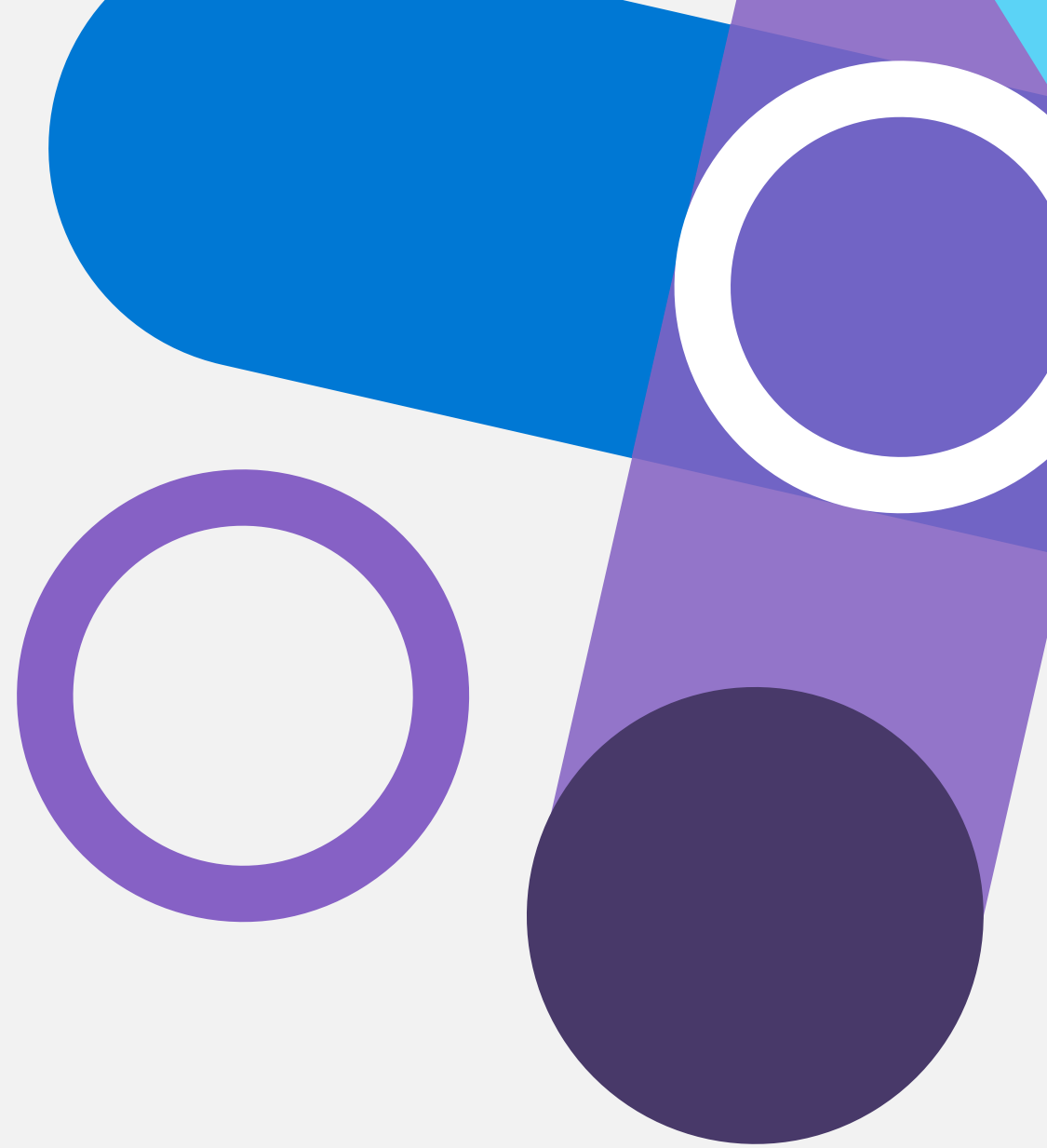< 6 mos   6 mos-1 yr   1-1.5 yrs   1.5-2 yrs   2+ yrs

What it shows

- Ramp up time for frontline sellers is between 1.5 to 2 years based on how their quota attainment accelerates for that tenure mark.

- Internal network size and breadth, along with external collaboration hours, also start peaking around a similar tenure mark.

Why it matters

- Successful onboarding usually extends beyond new hire trainings. Exploring the different collaboration behaviors between top performers and other employees provides insights about key factors that might lead to faster and more effective onboarding.

Appendix:
Case studies

Boosting revenue generation and quota attainment through Workplace Analytics insights
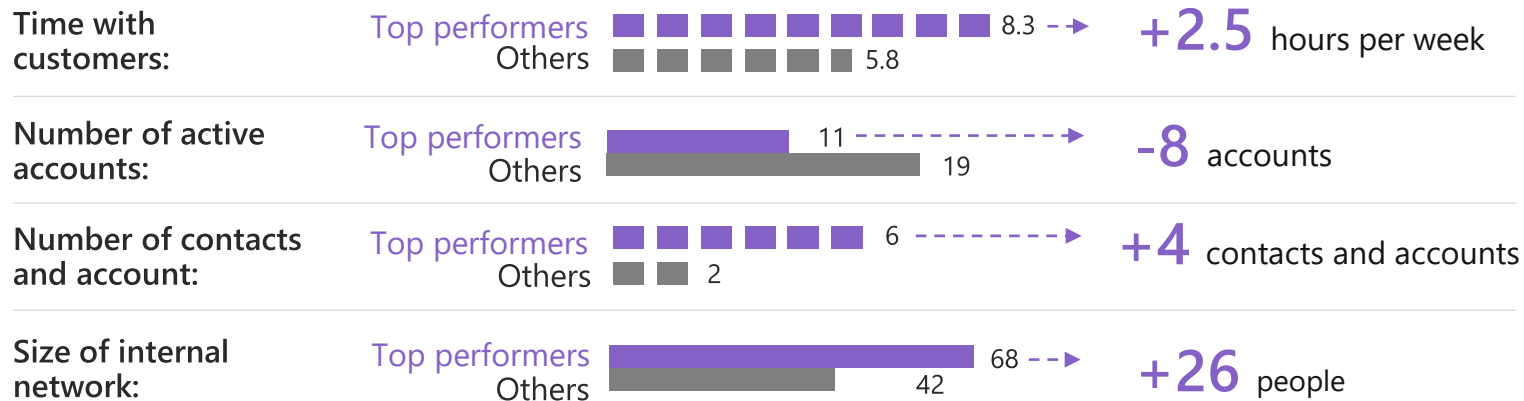
Core business challenge

- **Drive increased revenue** per salespeople to meet revenue targets.
- **Scale best practices** of top performing sellers across the sales organization.

Workplace Analytics solution

- Generated a **model of top salespeple and manager behaviors,** then shared dashboards with the field to **empower reps** to self-manage behaviors, including:
  – Time with customers
  – Network activity
  – Account relationship strength
- Deeper analysis found root cause was multiple handoffs due to lack of subprocess ownership.
- Tracking dashboard gave CFO and cross-functional team ability to monitor impact moving forward.

Action and impact

- Insights fueled **global sales effectiveness** initiative to enable and train all reps and managers on key **behaviors correlated with success.**
- Teams that adopted the model **outperformed teams that did not by $237 million.**

Time with customers:	Top performers — 8.3 / Others 5.8	**+2.5** hours per week
Number of active accounts:	Top performers 11 / Others 19	**-8** accounts
Number of contacts and account:	Top performers 6 / Others 2	**+4** contacts and accounts
Size of internal network:	Top performers 68 / Others 42	**+26** people

Key insights

- Top performing sellers spent **more time with customers** each week, **managed fewer accounts** simultaneously, and had **larger internal networks** than their peers.

- Workplace Analytics data provided **clear and replicable practices** for **driving higher revenue,** evidenced by **$237 million lift** for sellers who adopted this enabled model.

Data illustrative of findings, modified to protect privacy

Building sales excellence teams through KPIs and insights

Core business challenge

- The sales enablement organization from a Telco company wanted to improve sales effectiveness. They used Workplace Analytics insights to help answer these questions:
  - How much time do our sellers have with customers each week?
  - What types of **internal collaboration** consume the most seller time?
  - How much **formal 1:1 manager time** do our frontline sellers get?

Workplace Analytics solution

- Sales enablement analysts **combined CRM data with Workplace Analytics data to identify which practices top performing salespeople exhibit** around these three main areas and three KPIs and targets were identified.
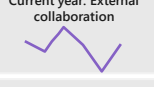
Action and impact

- Deployed **dashboards tracking KPIs**, giving General Managers and VPs ability to monitor progress for their teams.
- Change management focused on:
  - **Boosting sellers' externally focused** time allocation
  - Spending **less time in large and long internal meetings**
  - **Increasing formal 1:1 manager coaching** for sellers

Findings

1. Top performing sellers spend **more time collaborating externally.**

2. Top sellers spend **less time in large, internal meetings** with 18+ people and spend **more time in short, 30-minute meetings** than the low performers do.

3. Top sellers get **more manager 1:1 time** than the lower performers do.

Dashboards that track KPIs

Incorporating KPIs into CRM dashboard

BU1 scorecard	SCORECARD		
	SCORECARD	Internal collaboration	External collaboration	1:1 coaching

	CORRUPT INTERNAL COLLABORATION* (average hours per month)		
	CURRENT YEAR	LAST MONTH	BEST PRACTICE
	43	55	30

Current year: Corrupt Internal collaboration

FILTERS	EXTRNAL COLLABORATION (average hours per month)		
SALES VP All ▼	CURRENT YEAR	LAST MONTH	BEST PRACTICE
GM All ▼	29	30	60
OPTIONS			

Current year: External collaboration

BU 1 SCORECARD	1:1 COACHING (average hours per month)		
BU 2 SCORECARD	CURRENT YEAR	LAST MONTH	BEST PRACTICE
COMBINED			
HELP	2	2	2

Current year: 1:1 coaching

Data illustrative of findings, modified to protect privacy

* Corrupt internal collaboration is the total collaboration time spent in internal meetings with more than 18 attendees.

Accelerate growth by prioritizing key relationships

Core business challenge

- An EMEA Energy and Utilities wanted to know:

  - Are we dedicating enough resources to the **clients that will push our business forward?**

  - Are we wasting time supporting **opportunities with low upside potential?**

Workplace Analytics solution

- The company sought to evaluate time invested with clients relative to the strategic importance those clients held for their organization.

Action and impact

- Ensure values determining the strategic importance of clients **accurately reflect organizational priorities.**

- Monitor monthly collaboration on a per client basis **to ensure time investments with clients align with organizational priorities.**

- **Consider where cross and up-sell opportunities might exist** based on existing relationships.

Findings

1 Some clients generated

10X revenue per hour of employee time invested

relative to low-ROI clients

2 Many clients with growth opportunities of more than $1M received less than

50 hours per year

of support, as measured through time spent on email and in meeting interactions

Data illustrative of findings, modified to protect privacy

Help external-facing employees successfully adjust to new ways of working

Core business challenge

- An EMEA Energy and Utilities company wanted to know:
  - How can we **enable our sellers** to serve clients through **digital tools?**
  - Are all of our internal departments engaged in **client-centric practices?**

Workplace Analytics solution

- The company analyzed Microsoft 365 collaboration data for their onsite salespeople to try and help them better leverage digital tools as they shifted to remote work.

Action and impact

- The Workplace Analytics insights enabled the company to identify and internally share collaboration best practices, including:
  - Shift audio calls and in-person meetings to Teams video calls **to facilitate remote communication.**
  - Use instant messages and email **to promote asynchronous communication** within project teams.
  - **Store and share client information** through Teams channels.

Findings

1 Account managers spent just

3 hours per week

in digital collaboration with clients

2 66% of onsite engineering consultants averaged fewer than

10 Email and instant messages per week

to other members of their project teams

Data illustrative of findings, modified to protect privacy

Predicting customer churn to proactively retain and grow accounts
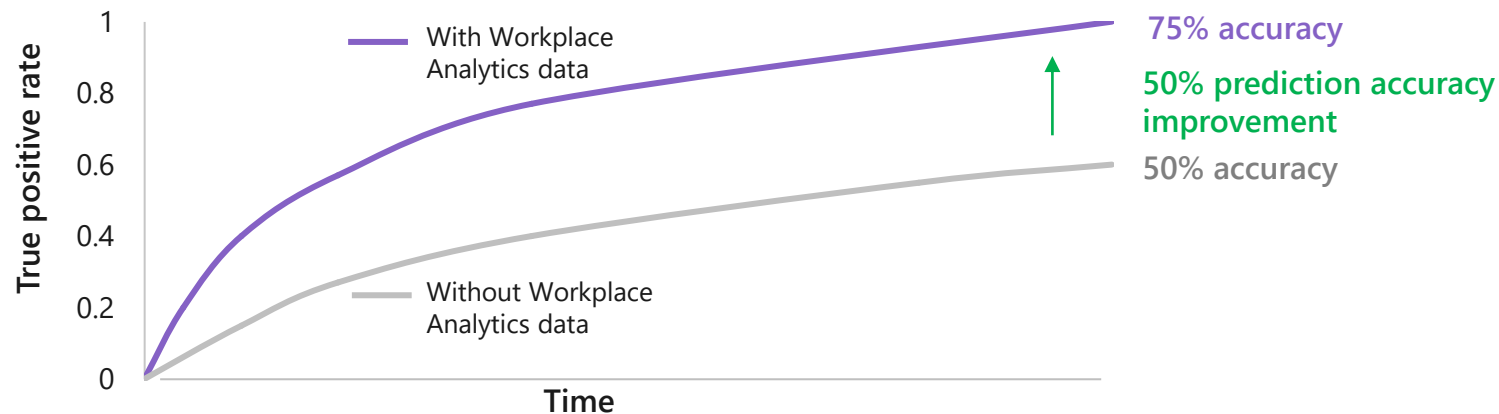
Core business challenge

- Proactively **predict customer satisfaction** to project a customer's likelihood of **renewing or churning.**
- **Optimize customer experience** to delight customers in a changing technology marketplace.
- Transform customer touchpoint data and survey information into a model with sufficient accuracy to deploy inform Sales team decisions.

Workplace Analytics solution

- *Before* using Workplace Analytics data, the model predicted customer satisfaction with approximately 50% accuracy. This model relied primarily on customer survey data.
- *To improve accuracy*, the team incorporated Workplace Analytics data into the model, including collaboration time, frequency, and breadth across each customer.
- *After* incorporating Workplace Analytics data, without any other data source changes, model's predictive accuracy improved to **75%** accuracy.

Action and impact

- Improvement in model **enabled team to begin deploying and improving** in the flow of work.
- Model to **drive better forecasting, planning and targeted training across** the field.

75% accuracy

50% prediction accuracy improvement

50% accuracy

With Workplace Analytics data

Without Workplace Analytics data

True positive rate — Time (1, 0.8, 0.6, 0.4, 0.2, 0)

Key insights

Workplace Analytics signal data improved the customer satisfaction model prediction accuracy model by **50%**, demonstrating the relevance of Microsoft 365 behavioral analytics in customer relationship management intelligence.

Data illustrative of findings, modified to protect privacy

Strategically matching time investments with top-line outcomes using Workplace Analytics

Core business challenge

- How can we **strategically dedicate organizational time** toward cultivating the most **demonstrably beneficial channel selling partners?**

- Are we delivering an **efficient and consistent experience** to all channel **seller partners,** across internal touchpoints?

Workplace Analytics solution

- Calendar, email, and CRM data indicated **mismatches between company time investments and partner value**. The analysis showed:

  – Time invested with partners not commensurate with partner-facilitated revenue generation.

  – Redundant and inconsistent interactions with the same partners.

Action and impact

- Analysis informed a **data-driven reorganization** of channel resources and a **measurement mechanism** and baseline benchmark for strategic channel investment decisions.

- Unlocked **true cost** to maintain each channel partner.
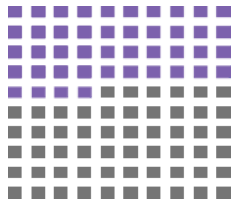
Workplace Analytics showed that **44% of employees** spent at least one hour per week with channel partners

Only **17% of total hours** with channel partners comes from employees in the channel

Note: Each dot represents one partner

Key insights

The company was investing significant time into cultivating channel partner relationships, but there was little correlation between time invested in a partner and that partner's revenue generation.

Data illustrative of findings, modified to protect privacy

Ensure clients receive holistic support and value from your organization

Core business challenge

- An EMEA raw materials supplier wanted to know:
  - Are account teams **fully leveraging internal support functions** when engaging with clients?
  - Are account teams **maximizing client value by coordinating their activity** with other internal lines of business?

Workplace Analytics solution

- The company completed a deep-dive analysis to better understand seller activity within one of their highest revenue-generating business units.

Action and impact

- Centralize client insights and activity through CRM dashboards **enriched with Workplace Analytics data.**
- Monitor and improve KPI's that measure **cross-functional client activity.**
- Consider **reorganizing account teams** to serve a small set of clients across a wide range of products, as opposed to having multiple account teams with limited product spans servicing the same clients.

Findings

① Frontline sellers brought support functions, such as supply chain, R&D, and manufacturing, to only

27% of their client meetings

② Frontline sellers spent only

4 hours per week

with employees outside their own business units

Data illustrative of findings, modified to protect privacy