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Microsoft 365
COMMUNITY CONFERENCE

MAY 6-8, 2025 • LAS VEGAS, NV

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NextGen 365 Events *presents*

Microsoft 365
COMMUNITY CONFERENCE

Upgrade your Company Operating System with Microsoft Viva

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NextGen365Events.com

Agenda

INTRODUCTIONS

THE COMPANY OPERATING SYSTEM

SIGNS YOU MAY NEED (A NEW) COS

COS Implementation & Case Study

USING VIVA IN A COS

Microsoft VIVA

Conclusion

INTRODUCTIONS

ABOUT SYNOZUR

Making the desirable achievable

Synozur – the **transformation company** - is a woman-owned **advisory agency** that transforms business for clients, making the desirable achievable.

We help clients reimagine how they do business and evolve to succeed. Our **empathetic** approach is **tailored** to your unique journey, navigating the complexities of leadership and strategy with ease.

Our consultants have decades of experience delivering **global strategic advisory services** that elevate you to achieve breakthrough innovation.

Synozur illuminates the pathway for **excellence and success**.

Synozur at M365 Conference

Information Architecture (IA) for Enterprise AI

Michelle Caldwell / Chris McNulty | Sunday May 4 9am-4pm

Upgrade Your Company Operating System with Microsoft Viva

Chris McNulty | Tuesday May 6 12:15pm

From Scratch to Spectacular: Starting Out with Power Pages

Shari Oswald | Wednesday May 7 8:00am

Quick, Creative, and Compelling: Unleash Clipchamp to emPOWER! Your eLearning!

Shari Oswald | Wednesday May 7 11:20am

Meet Synozur at Booth 412

Win prizes and find your North Star

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Find your North Star with Synozur

Visit **booth 412** for a chance to win a **Karaoke Machine, Mini Video Projector, starry skylights, sunglasses,** or any of our other prizes! (Yes, our **socks** are back too!)

Raffle times:
Tuesday **5:30pm**, Wednesday **5:30pm**, Thursday **2:00pm**
You must be present to win!

Sunglasses

Mini video projector

Karaoke Machine

Starry Sky Light

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CHRIS MCNULTY

Chief Technology Officer

Chris is an award-winning seasoned **product, marketing and technology executive** with experience spanning generative AI, Copilot, and Microsoft 365 for knowledge management, content management, and automation.

Chris McNulty leads marketing and strategic customer engagement for Synozur.

Prior to working with Synozur, Chris was Director of Product Marketing for Microsoft 365, Copilot, SharePoint Premium, Teams, OneDrive, SharePoint, and Stream as Microsoft, where he oversaw customer communications, go-to-market, field readiness, channel partners and executive briefing engagements.

A co-creator of Microsoft Viva and Syntex, Chris's experience as CTO includes companies such as Dell and Quest Software and executive IT leadership at Santander, GMO, and State Street. He was first recognized as a SharePoint MVP in 2013. A frequent speaker at events around the globe, Chris is the author of the "SharePoint 2013 Consultant's Handbook" among other works, and holds several patents. He holds an MBA from Boston College in Investment Management and also cohosts the Intrazone podcast at https://aka.ms/TheIntrazone

Microsoft DELL Technologies Santander STATE STREET Manulife John Hancock Quest

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Ask!

Please,
we invite you to ask questions
during the presentation.

Please interrupt!

THE COMPANY OPERATING SYSTEM

Setting the stage

2023 Vistage CEO survey

Only **35%** say their resources are well-aligned to priorities

Only **50%** regularly measure progress on goals using defined measures

Only **17%** of companies have an established framework

What is a Company Operating System?

An intentional, documented framework that:

1. Creates clarity and focus on business priorities
2. Maintains focus on those priorities
3. Measures the effectiveness of the business
4. Maintains awareness of business performance on a regular meeting rhythm

Purpose of a Company Operating System?

Align people, resources, and plans for more predictable attainment of goals

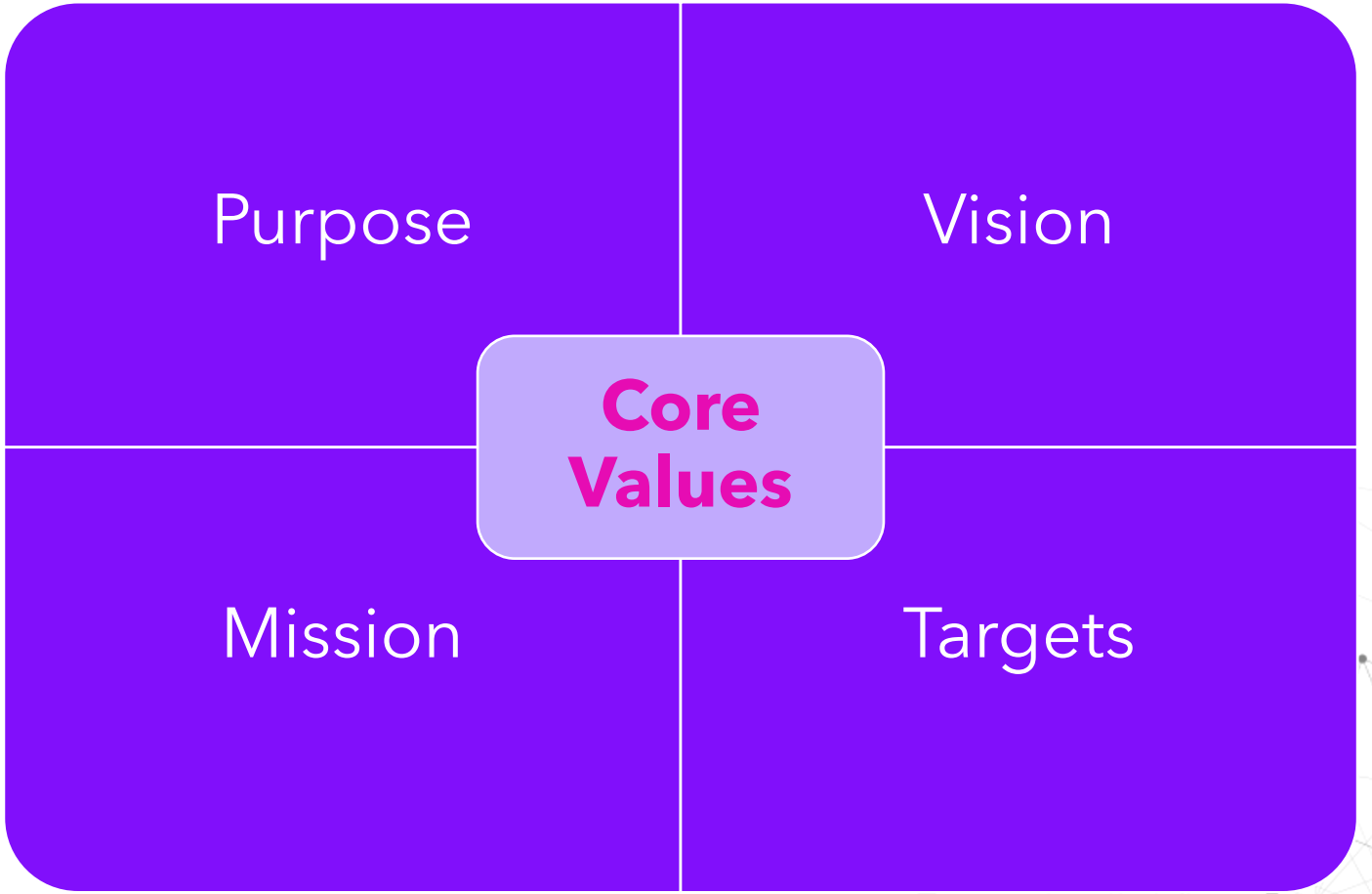
Analogy to Computer Operating System

- COS serves as the 'operating system' for a business
- Ensures smooth and coordinated operations within the organization

Key Components of a COS

- Business foundation
- Strategy
- Annual Plan
- Focus rhythm

COS Component 1- Biz Foundations



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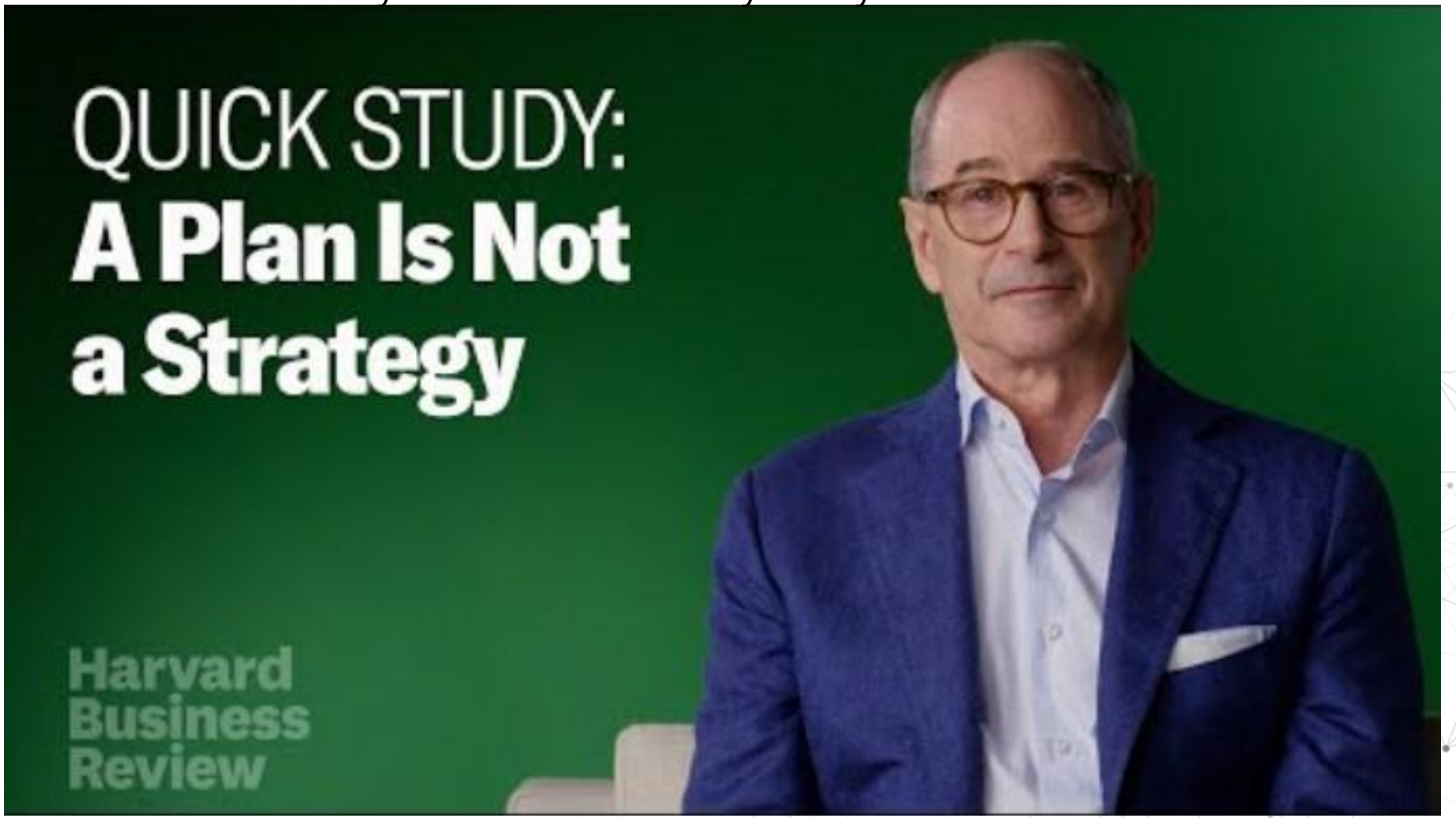
COS Component 2 – Strategy

Definition of Strategy:

An integrated set of choices that position you on the playing field of your choice in a way that you will win.

Part 1



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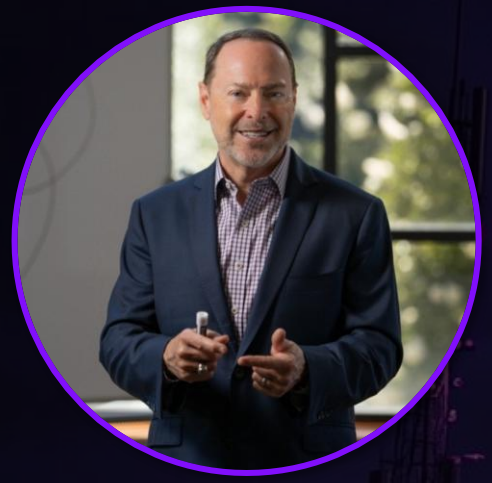
polaris
PODCAST
Streaming now at polaris.synozur.com

Strategy Unplugged: The Strategy Dialogues



Dr. John Hillen

Board Chairman, Author, & Professor

"If you wait until you need a strategic relationship, it's too late to form it."

polaris PODCAST

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Dr. John Hillen

Board Chairman, Author, & Professor

"Instead of seeking out the most competitive environment where everybody's fighting for the customers …go to where the customers 'ain't', but you could …draw new customers there."

polaris PODCAST

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Dr. John Hillen

Board Chairman, Author, & Professor

"Everybody's got the strategic thinking muscle, even though only a small percentage ... naturally think strategically, but everybody can build that muscle."

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COS Component 2 – Strategy

Strategy vs. Planning

	Strategy	Planning
End goal	Outcome	Output
Control	Customers	You
Comfort level	UNcomfortable	Comfortable
Purpose	"Here's what we think will happen with these choices"	Identify actions to execute the strategy choices
Risk and unknowns	High	Low - mid

COS Component 2 – Strategy

Strategic vs. Operational

	Strategic	Operational / BAU / FTB
Nature	Transformative and forward-looking	Maintenance and continuous improvement
Focus	Objectives / Outcomes. New states of being - new capabilities, new market position	Efficiency / effectiveness
Emphasis	Planning	Execution
Measures	"Are our strategy choices working?"	"Is the business healthy?" KPI's; Improve the engine

COS Component 3 – Annual Plan

1. Annual Objectives –
   Move the needle, New capabilities, New market position

2. Annual Targets –
   Measured targets to reach

3. Quarterly Rocks –
   Incremental things to achieve to reach the Annual Objectives

How to create it: Workshops

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COS Component 4 – Focus Rhythm

1. Scorecard

- "What gets measured gets managed"
- "If you can't measure it, it doesn't exist"

2. Annual Planning

- Retrospective: Objectives, Strategy
- Next year's Annual Plan

3. Quarterly Planning

- Retrospective
- Next Quarter's plan

4. Weekly Focus Meeting

- Rock review
- Scorecard review
- To-do's
- Problem solving

SIGNS YOU MAY NEED (A NEW) COS

COS Maturity Model

The Company Operating System Maturity Model					
	100 - Initial	**200 - Managed**	**300 - Defined**	**400 - Quantified**	**500 – Integrated**
Business Foundations	Undocumented	There is a mission statement, but it's not well known	Mission, vision, values are documented and available to all	Components are deeply integrated into comms and regularly used by leaders and staff	Alignment with components is measured and reviewed on a regular schedule.
Goals	Undocumented	Defined at high level with some ad hoc, divisional work; often not measurable	Goals are established and shared annually	Goals have clear owners and are routinely reviewed	Data is automatically gathered and used to evaluate goals
Strategy	Siloed plans are mistaken for integrated strategy choices	Divisional plans are cherry picked as top level "strategy"	Strategy choices are created annually.	Strategy choices are clear to leaders and appropriate staff with periodic updates	Strategy effectiveness is routinely evaluated with metrics.
Management Framework	Ad hoc, flavor of the month for what's important	Regular meetings and communication.	Consistent approach to annual planning and strategy development	Strategy is implemented according to a hierarchy of SMART goals.	A framework with foundations, strategy, planning, and regular evaluation of metrics is integrated at all levels
Founder dependence	Founder has distributed little authority – all decisions run through founder.	Decisions are sometimes deferred to individual leaders	Leadership team is established, no consistent process or decisions and reviews	Founder operates a Board/CEO; organization understands and works with LT	Org structure and distributed responsibilities are clear to all with founder in a Board role

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COS Upgrade Signals

- Misalignment of Efforts
- Lack of Clear Direction
- Ineffective Communication
- Low Employee Engagement
- Inconsistent Decision Making
- Resistance to Change
- Talent Retention & Development
- Operational Inefficiencies
- BOPSAT (Bunch Of People Sitting Around Talking)
- Goals aren't being attained

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6 benefits of a COS

6 Benefits of a COS

Clarity & Focus

Improved Business Performance

Increased Accountability

Honest Measurement & Decisions

Agility & Responsiveness

Reduced anxiety

Clarity and Focus

- Provides a clear vision and **prioritizes** actions
- Allows businesses to **measure effectiveness**
- Maintains **awareness** of performance
- Enables organizations to scale **predictably**
- Ensures every member understands their contribution
- Aligns contributions with broader strategic objectives

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Improved Business Performance

Streamlined Processes

- Boost productivity
- Reduce wasted time and resources

Clear Guidelines

- Ensure actions align with strategic goals
- Minimize redundancies

Structured Framework

- Optimize resource allocation
- Enhance overall operational efficiency

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Increased Accountability

Clearly Defined Roles & Responsibilities

- Improves accountability & performance
- Employees understand their responsibilities
- Reduces confusion and aligns efforts across teams

Fosters a Culture of Accountability

- Individuals take ownership of their tasks
- Encourages delivering results

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Honest Measurement and Decisions

Importance of Measuring What Matters

- COS enables organizations to focus on key metrics
- Provides insights that inform business decisions

Honest Evaluation of Strategic Decisions

- Assess if plans are yielding expected results
- Ground decisions in empirical evidence

Leveraging Data for Informed Decisions

- Move away from intuition or conjecture
- Make decisions based on data-driven insights

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Agility and Responsiveness

Importance of Agility in Business

- Respond quickly to market changes
- Adapt to customer feedback
- Seize emerging opportunities

Maintaining a Competitive Edge

- Flexibility to pivot strategies
- Adapt strategies as needed
- Ensure organizational responsiveness

Resilience in the Face of Change

- Remain resilient amidst changes
- Implement a well-structured COS

Reduced Anxiety

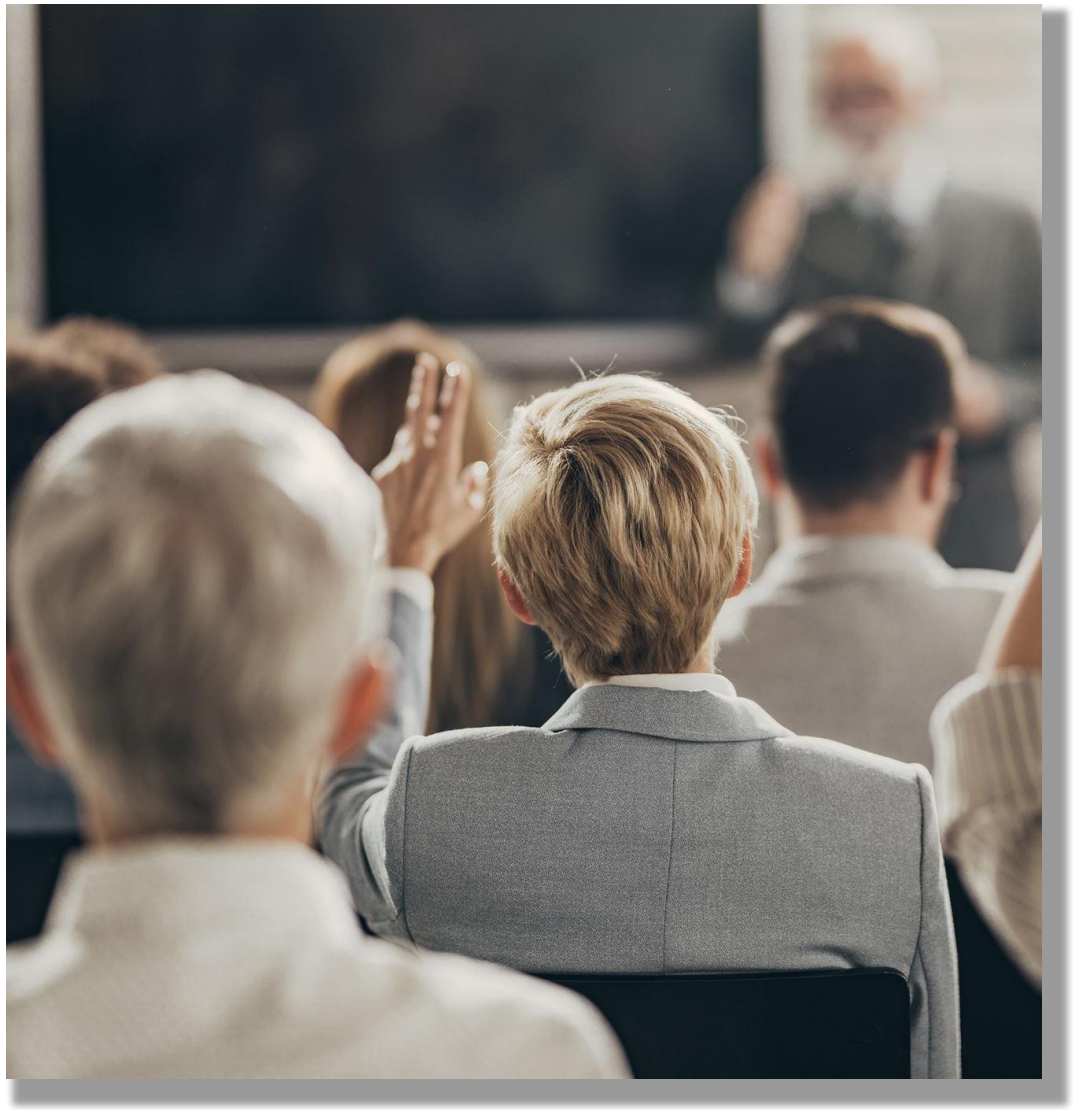
My boss and peers have agreed on our priorities

Leaders and staff aren't wondering if their efforts and plans fit into the big picture
"…am I spending my energy on the right things?"

"When everything is a priority, nothing is a priority"

COS Implementation & Case Study

How do you implement a COS?



Educate

Obtain buy-in

Tailored Approach

- Customizable to fit specific needs

Various Formats

- Paper
- Digital: Microsoft Viva and others

Flexibility

- Format choice is not critical

Good Practices

1. Educate, educate, educate!
2. Design / choose your framework
3. Determine your taxonomy
4. Hire a consultant to facilitate
5. Be honest, let data be the bad guy

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Microsoft Case Study

TRANSFORMING MARKETING MANAGEMENT

Microsoft needed to reinvent annual planning and execution for marketing teams. Key challenges for Microsoft' included an outdated management framework, siloed operations leading to lack of cohesion, and operational delays creating limited impact on market and customer engagement

Synozur's Approach:

- Conducted a comprehensive review of existing frameworks
- Designed and implemented a new, agile management framework
- Facilitated a transformative two-day offsite annual planning event
- Created a clear management roadmap and OKRs for the upcoming fiscal year
- Delivered coaching and change management to drive adoption of the new operating plan

Benefits to Microsoft:

- Achieved higher revenue and customer engagement metrics
- Improved team productivity and interdepartmental cohesion
- Fostered a culture of innovation and dynamic goal setting
- Prepared the team for future challenges with a robust management system

"I couldn't be happier with the results. We had a great offsite that brought the team together on common goals instead of running as a band of disconnected individuals. We were able to achieve more on our objectives and share them like never before."

- Microsoft senior director of product marketing, Microsoft 365

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Learn more at https://aka.Synozur.com/msft-cos

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USING VIVA IN A COS

Microsoft VIVA

What is Microsoft Viva?

Microsoft Viva Overview

Employee experience platform

Composed of different apps

Customizable and Extensible

Can be tailored to organizational needs

Accessible from anywhere

Integration with Existing Tools

Works with tools already in use

Supports various partner integrations

Key components for COS

Viva Goals

- Used for OKR definition, management, and reporting

Viva Amplify

- Facilitates communication

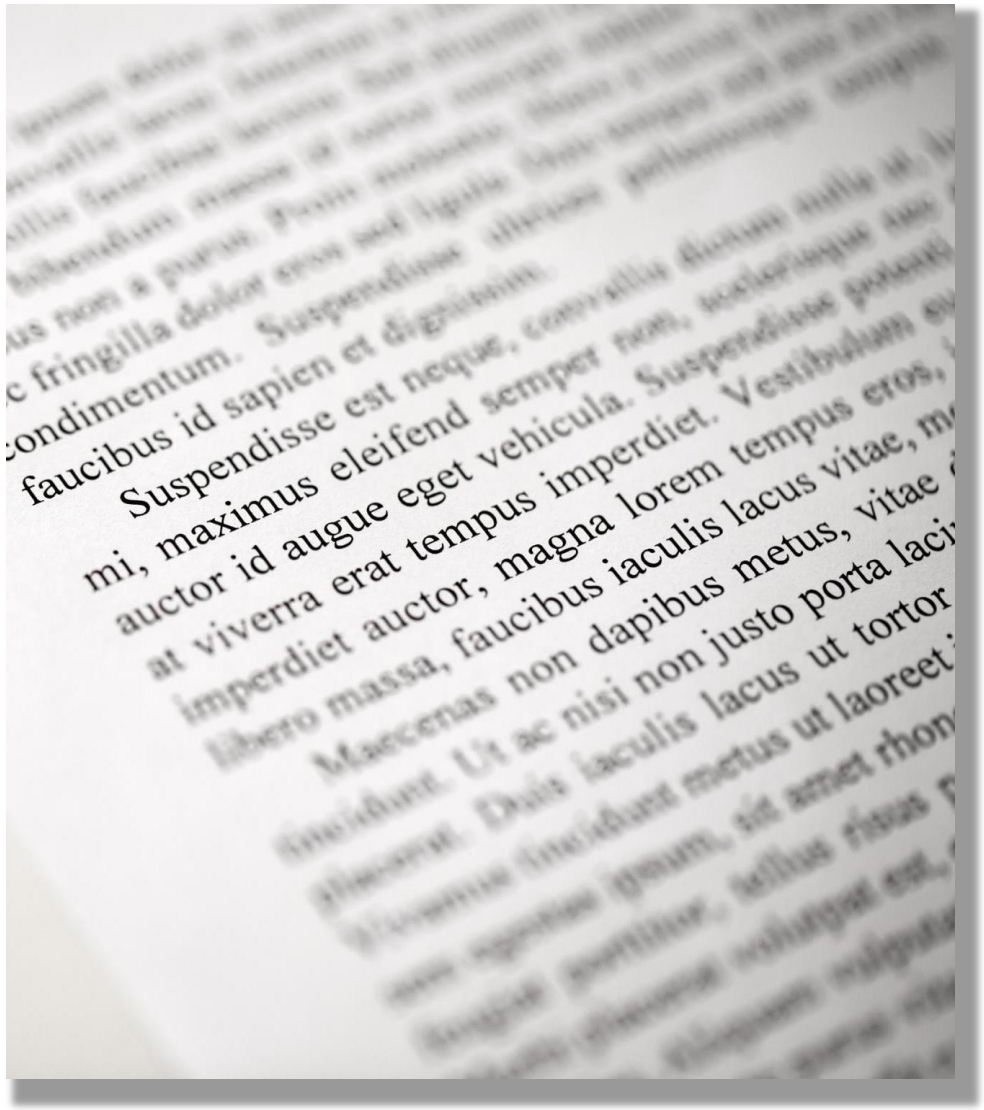
Viva Connections

- Used for distribution along with other tools

Copilot

- Assists with reporting, communications, and meetings

Using Word, PowerPoint, Whiteboard



Implementation of COS

- Can be done using Word
- Can be done using PowerPoint
- Can be done using Whiteboard

Viva's Role

- Viva is not a Company Operating System
- It is a tool to help deliver and optimize your Company Operating System
- Based on OKR framework

Setting up Viva Goals

Microsoft Viva Goals

Setting up organization ad teams

- Terminology
- Permissions

Creating OKRs

- Manual
- Imported
- Copiloot assisted

Creating key results

- Assigning tasks and responsibilities
- Integrating projects and other data (Excel & Planner)

Reporting features

- Dashboards
- PowerPoint
- Other…

Replacing Viva Goals

Microsoft Recommended Replacements

Attribute	Workboard	Workpath	Quantive	Perdoo	Profit.co
Customer segment / Markets served	**Enterprise**: 33% **Midmarket**: 45% **SMB**: 22% **Primary Focus**: Enterprise customers and Midmarket	**Enterprise**: 22% **Midmarket**: 55% **SMB**: 23% **Primary Focus**: Midmarket and enterprise customers	**Enterprise**: 30% **Midmarket**: 40% **SMB**: 30% **Primary Focus**: Enterprise customers and Midmarket	**Enterprise**: 20% **Midmarket**: 40% **SMB**: 40% **Primary Focus**: Midmarket and SMB customers	**Enterprise**: 10% **Midmarket**: 55% **SMB**: 35% **Primary Focus**: SMB and Mid-market
Goal Frameworks Supported	OKRs	OKRs, Goals, KPIs	OKRs, SMART	OKRs, KPIs, SMART	OKRs, SMART
Collaboration Features	OKR-centric collaboration, collaboration boards, file sharing, discussions, meetings and agenda	OKR-centric collaboration for business units and cross functional alignment check-ins, feedback.	OKR-centric collaboration like check-ins, discussions, boards, reviews, cross functional OKRs	OKR centric collaboration, check-ins, feedback + meetings, 1:1s, reviews	OKRs centric collaboration like check-ins reviews + emp engagement like 1:1s, reviews, feedback

Power BI

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DEMO
Power BI

Microsoft VIVA

Viva Amplify / SharePoint News

Microsoft Viva Amplify

- What goes into a report
- Who gets it and how
- Creating campaign
- Designing templates
- Selecting channels
  - Outlook
  - SharePoint
  - Teams
  - Viva Engage [coming now]
- Reporting

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DEMO
VIVA AMPLIFY

Microsoft VIVA

Viva Connections

Microsoft Viva Connections

Setup

- Root site
- Hub
- Look and feel
- Registration

News

Integration with SharePoint & Teams

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DEMO VIVA CONNECTIONS

Microsoft VIVA

Conclusion

Resources

- Events
  - Mastering your AI Rollout: June 12 aka.synozur.com/strategy-masterclass
  - Business Strategy Master Class: June 17 aka.synozur.com/master-ai-2025
  - TechCon 365 Seattle: June 23-27 https://aka.synozur.com/tc365sea
- Solutions:
  - Strategy Transformation https://aka.synozur.com/CoS
  - Employee Empowerment https://aka.synozur.com/services/exp
  - Copilot Strategy & Design https://aka.synozur.com/AI
  - GTM Transformation https://aka.synozur.com/services/partners
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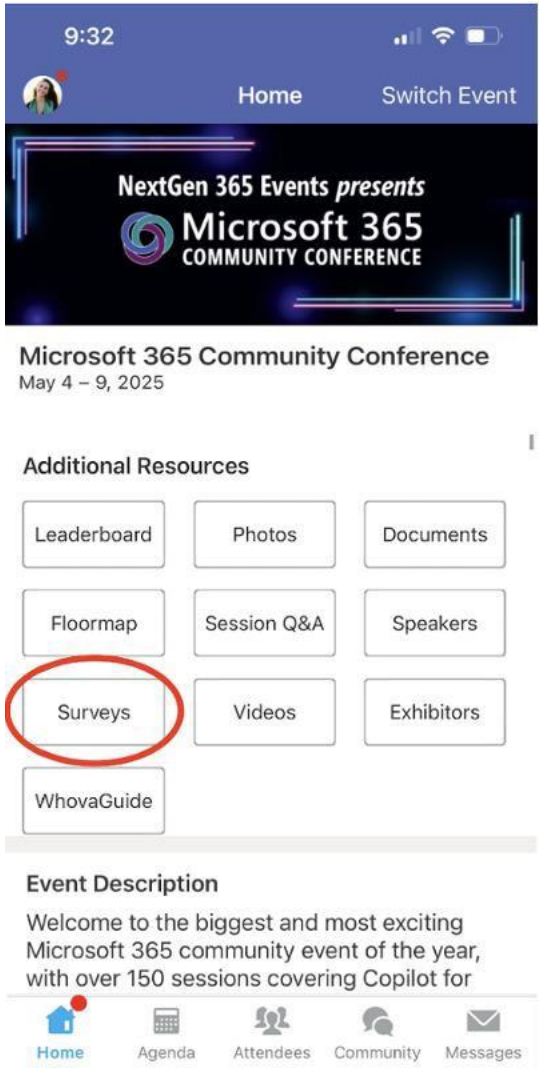
The official event app for the Microsoft 365 Community Conference

Join the event app to access:

- Event announcements
- Personalized agenda, session details
- Speaker & attendee profiles
- Networking, meet-ups, messages
- Event documents

Event Invitation Code:
NextGen2025

Session Feedback Surveys



We really want to hear from YOU!

In the pursuit of making next year's Microsoft Fabric Community Conference even better, we want to hear your feedback about this session.

Here's How -

- *Simply go to the Whova App on your smartphone*
- *Scroll down on the M365 Community Conference Homepage to 'Additional Resources' to click "Surveys'.*
- *Click Session Feedback.*
- *Scroll down to find this session title.*
- *Complete the session feedback survey.*
- *Finally, click 'Submit'*

UPCOMING 2025 EVENTS

next GenAI CONFERENCE

OCTOBER 7-9, 2025

WORKSHOPS: October 5, 6 & 10

Lowes Sapphire Falls Resort, Orlando, FL

NextGenAIconf.com

Power Platform COMMUNITY CONFERENCE

OCTOBER 28-30, 2025

WORKSHOPS: October 26, 27 & 31

MGM Grand, Las Vegas, NV

PowerPlatformConf.com

Thank you.

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