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| Logo  Description automatically generatedLogo  Description automatically generated with medium confidence  Expert Insights Playbook | FY22 | | |
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Created by: Erika Whinihan | Last Edited: August 12, 2021

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# Background on Expert Insights and Goal for Microsoft Library

The Expert Insights Playbook is a guide for the MS Library to use to create an event for library customers to learn from a third-party market research firm or third-party research database firm directly. These events are intended to be focused on topics that are relevant to Microsoft’s business goals, priorities, and customer needs.

These events will provide an opportunity for third-party firms to offer MS Library customers the following benefits:

* + Specific and meaningful expertise provided to the MS Library community and an opportunity to give an inside look into the company to showcase the services, information, and resources they have to offer Microsoft employees.
  + Opportunity for Microsoft Executive(s) to engage with third-party research firm and Microsoft employees to garner further visibility into specific topic areas.
  + Opportunity for firm(s) to show how to best utilize their website and tips for best searching practices.
  + Opportunity for firm(s) to share what is unique about their company and how they can help Microsoft employees in a specific industry or topic area.
  + Chance for market research firm or research database firm to promote future partnership with Microsoft.

# Timeline

Expert Insights events will occur on a quarterly basis during H2 FY22 and can be reevaluated at the end of Q4 to determine whether cadence is appropriate based on customer interest and engagement. If these events are well received, they could potentially move to a monthly basis in FY23.

These events could be integrated into the MS Library office hours FY22 schedule to see if this is a useful approach to increase attendance and awareness of the event or be facilitated as a stand-alone event.

FY22 Q3 event: Date TBD 2022 | (Expert: Omdia) | Topic: Cloud Gaming

FY22 Q4 event: Date TBD 2022 | (Expert: IBISWorld) | Topic: Software Development in China or Video Games

# Experts and topics

## Expert #1: [OMDIA](https://omdia.tech.informa.com/)

Expert Analysts:

[Dom Tait](https://nam06.safelinks.protection.outlook.com/?url=https%3A%2F%2Fomdia.tech.informa.com%2Fauthors%2Fdom-tait&data=04%7C01%7Cerikaw%40microsoft.com%7C19ad93d7669c4b3458b708d952d20152%7C72f988bf86f141af91ab2d7cd011db47%7C1%7C0%7C637631884397073294%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C1000&sdata=pQoXQxYR%2BmKkJUD1G3czN82Wb01MdRAwgilZeLDbs70%3D&reserved=0) – Gaming Practice Lead

[George Jijiashvili](https://nam06.safelinks.protection.outlook.com/?url=https%3A%2F%2Fomdia.tech.informa.com%2Fauthors%2Fgeorge-jijiashvili&data=04%7C01%7Cerikaw%40microsoft.com%7C19ad93d7669c4b3458b708d952d20152%7C72f988bf86f141af91ab2d7cd011db47%7C1%7C0%7C637631884397083286%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C1000&sdata=RSL1amfa%2FTtb%2FrJJ%2FzbEUuV5iJrK0zqsY6O7PFFEWMo%3D&reserved=0) – Cloud Gaming

[Steven Bailey](https://nam06.safelinks.protection.outlook.com/?url=https%3A%2F%2Fomdia.tech.informa.com%2Fauthors%2Fsteve-bailey&data=04%7C01%7Cerikaw%40microsoft.com%7C19ad93d7669c4b3458b708d952d20152%7C72f988bf86f141af91ab2d7cd011db47%7C1%7C0%7C637631884397083286%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C1000&sdata=fEMgzZDh9s8TBPFFNyl9ohjdBCchv4wjRL3cAEyq93Y%3D&reserved=0) – Convergence of OTT and Gaming (Netflix announcement)

[David Tett](https://nam06.safelinks.protection.outlook.com/?url=https%3A%2F%2Fomdia.tech.informa.com%2Fauthors%2Fdavid-tett&data=04%7C01%7Cerikaw%40microsoft.com%7C19ad93d7669c4b3458b708d952d20152%7C72f988bf86f141af91ab2d7cd011db47%7C1%7C0%7C637631884397093285%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C1000&sdata=sLlEBAdCK%2FgmlzAwdD62H9ywQ%2FyEMbPSSqBhnZhbdEE%3D&reserved=0) – Consumer Trends and Connected Devices

Omdia business partner contact: [Alex Deschamps](mailto:Alex.Deschamps@omdia.com)

Topic: Cloud Gaming

Cloud gaming allows customers to play games using remote servers in data centers and streams them directly to an app or browser that is installed on a device. Cloud gaming is a key part of the future of cloud services that will be offered by Microsoft through Game Pass and is a crucial part of the company’s mission and future ambitions to continuously bring people together.

Tentative Agenda:

* *Media & Entertainment: 2021 research themes*
  + Thriving, not just surviving, post-COVID-19
  + Competing in the new attention economy
  + Taking “big content” to the next level
  + New dynamics in advertising and monetization
  + Harnessing the power of video gaming
  + Disruptive or disrupted? Big tech in 2021
  + New-wave bundling and partnership strategies

Areas of interest and talking points:

* Related article: [Microsoft's future vision sees premium gaming on every screen :: Omdia (informa.com)](https://omdia.tech.informa.com/OM019024/Microsofts-future-vision-sees-premium-gaming-on-every-screen)
* Related article: [Bringing the Joy and Community of Gaming to Everyone - Xbox Wire](https://news.xbox.com/en-us/2021/06/10/whats-next-for-gaming-highlights/)
* How to best continue and enrich partnership with Microsoft
* Competition with Google Stadia and PlayStation Now
* Key trends in cloud gaming and subscriptions; what are the most interesting opportunities that will shape the market in 2022 and beyond?

Additional notes:

* How to cite Omdia: email [citations@omdia.com](mailto:citations@omdia.com) and a member of the Omdia team will be in touch to approve data/research citation requests

## Expert #2: [IBISWorld](https://my.ibisworld.com/)

*Potential topic #1:*

Expert Analyst: To be confirmed closer to event date (IBISWorld business partner contact: [Chris O’Brien](mailto:chris.obrien@ibisworld.com))

Topic: Video Games Software Developers | Industry IEXPERT [Report](https://my.ibisworld.com/us/en/iexpert-specialized/od4570/iexpert#key-industry-data) or Video Game Software Publishing in the US | US Industry (NAICS) [Report](https://my.ibisworld.com/us/en/industry/51121e/about) 51121E

This industry focuses on development of video game software for use on computers, video game consoles and mobile devices/applications. The major products and services in this industry are action games, shooter games, sports games, casual games, and other games.

Areas of interest and talking points:

* How to navigate IBISWorld website; best searching practices and how to read/navigate industry reports (Chris to demo)
* Industry operations
* Market share overview
* Outlook for industry revenue decline in 2020 and anticipated growth to 2026
* Industry threats/opportunities
* Future impact on cloud gaming

*Potential topic #2:*

Expert Analyst: To be confirmed closer to event date (Contact: [Chris O’Brien](mailto:chris.obrien@ibisworld.com))

Background on Topic: Software Development in China | Source: Industry [Report](https://my.ibisworld.com/cn/en/industry/6211/about) 6211

This industry primarily focuses on establishments that provide software products, including applications software, system software and support software. Industry operators also provide software-related services, such as software design, testing, outsourcing, programming and analysis. This industry is projected to grow continuously strong over the next five years through 2026.

Areas of interest and talking points:

* Discussion of major player in this industry: Huawei Technologies Ltd.
* Primary activities of this industry including designing software and software programming
* Related/similar industries; related international industries
* Future impact on cloud gaming
* Related topic paper by ProResearch: [The China Market](https://microsoft.sharepoint.com/sites/library/KeyTopics_Documents/Research/Research_TopicPaper_China.pdf) (July 16, 2021)

# Communications and Promotions

These events should be promoted via MS Library distribution list, CI Champs distribution list, Yammer channel, library orientation, partner channels, and on the library portal. Suggested language for several platforms is below. “Save the Date” communication should be sent out four to six weeks in advance of each event.

**MS Library News: Join us for our first Expert Insights Event! | Date 2022 TBD | Time TBD**

Join your MS Library team and CVP from Cloud Gaming (Kareem Choudhry) for our first *Expert Insights* event where we will be joined by expert analysts from Omdia and learn about their research in the cloud gaming space. Learn more about Omdia at: [Home Page :: Omdia (informa.com)](https://omdia.tech.informa.com/)

Please join the Teams Event here: *<insert link>*

**CI Champs Email: Get Your Gaming Gear Ready & Pass Along This Exciting News!**

Hi CI Champs,

Forward this email! Your MS Library team is excited to bring you our first *Expert Insights* event, which will feature expert analysts from Omdia and the CVP of Cloud Gaming (Kareem Choudhry) in a presentation and fireside chat. Omdia experts will share their research and knowledge of cloud gaming, consumer trends and connected devices, and the convergence of OTT and Gaming.

This event will take place on *Month, Day, 2021* at *Time PT.*

Learn more about Omdia at: [Home Page :: Omdia (informa.com)](https://omdia.tech.informa.com/)

Please join the Teams Event here: *<insert link>*

**Yammer:**

Attention Gamers! Upcoming Event Alert! Join your MS Library team and CVP from Cloud Gaming (Kareem Choudhry) for our first *Expert Insights* event where we will be joined by expert analysts from Omdia and learn about their research in the cloud gaming space.

This event will take place on *Month, Day, 2021* at *Time PT.*

Learn more about Omdia at: [Home Page :: Omdia (informa.com)](https://omdia.tech.informa.com/)

Please join the Teams Event here: *<insert link>*

**Library Portal: add to Upcoming Events section with following language:**

Join your MS Library team and CVP from Cloud Gaming (Kareem Choudhry) for our first *Expert Insights* event where we will be joined by expert analysts from Omdia and learn about their research in the cloud gaming space.

This event will take place on *Month, Day, 2021* at *Time PT.*

Learn more about Omdia at: [Home Page :: Omdia (informa.com)](https://omdia.tech.informa.com/)

Please join the Teams Event here: *<insert link>*

# Example Agenda

Assuming one hour will be allotted for these events, below is a sample agenda of how to best utilize time:

00:00-02:00 – Welcome to Omdia presenter and library customers to event with background on purpose of *Expert Insights* event (Library FTE) and introduction of Microsoft Exec/CVP

2:00-05:00 – Omdia presenter(s) to give background on company and brief overview of website, content, and partnership with Microsoft

05:00-30:00 – Experts to present on Cloud Gaming topics

30:00-45:00 – Fireside chat discussion with experts and CVP of Cloud Gaming, Kareem Choudhry

45:00-55:00 – Open Q&A with audience

55:00-60:00 – Wrap up & Thank you (Library FTE to mention follow-up survey and iterate the importance of filling it out; link will be sent out in chat)

# Presentation Guidance

Prior to event, MS Library will send presenters the timeline for the event along with *Presenter FAQ* (see Appendix A).

Guidelines for Presenter deck:

* Please see Microsoft Brand Central guidelines for third-party presentations and how to use Microsoft logo should you include in your presentation: [External Parties and Our Brand Assets](https://1drv.ms/b/s!AmJbSLE3XmvupIM5BJqPCjPe515OBg?e=ZjiQxf)
* Microsoft Trademark and Brand Guidelines: [Trademark and Brand Guidelines | Microsoft Legal](https://www.microsoft.com/en-us/legal/intellectualproperty/trademarks)
* Accessibility Tools: [Supplier Web Accessibility Tools | Microsoft Accessibility](https://www.microsoft.com/en-us/accessibility/supplier-toolkit-resources)
* Refrain from including information related to sales, any copyrighted content, or other questionable content.
* Please send deck to MS Library staff for review ten business days before event.
* Optimize slides for viewing on desktop computer or laptop as this is a virtual event.

## Helpful links for presenters

MS Library adheres to the [Microsoft Data Protection Notice](https://nam06.safelinks.protection.outlook.com/?url=https%3A%2F%2Fcomm.microsoft.com%2FPoliteMail64%2Fdefault.aspx%3Fpage%3Dt9Rv3hjXAUWbfZBS4XjvhQ%26ref_id%3DXvSA296MakmNhZCGLXJPpg&data=04%7C01%7Cerikaw%40microsoft.com%7C92b5e1cb35c8428896de08d94230c71f%7C72f988bf86f141af91ab2d7cd011db47%7C1%7C0%7C637613599531913194%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C1000&sdata=UEWrYOSFpAEaviLadJrzXDZADnZlSXAcsXoTYJfj4ws%3D&reserved=0)

Data Privacy: [Data Privacy Notice – Microsoft privacy](https://privacy.microsoft.com/en-US/data-privacy-notice)

# Hosting Guidance

MS Library staff will be the primary hosts of these events, but it may be beneficial to select a Microsoft host from within Gaming or Business Development groups.

Suggestions for hosts from Gaming for Omdia Event: [Kareem Choudhry](https://whoplus.microsoft.com/Org/KAREEMC), CVP Cloud Gaming (Chief of Staff: [Juliana Tioanda](https://whoplus.microsoft.com/Org/JULIAT), Executive Assistant: [Julie Thomas](https://whoplus.microsoft.com/Org/JPAYTON))

MS Library staff to introduce CVP after presentation by experts concludes and let audience know that an informal fireside chat conversation will proceed for the next 15 or so minutes and will be followed by open Q&A from the audience.

An email introduction between the CVP, their EA or COS is a good idea so that they can virtually meet and exchange emails/information as they see fit. The CVP could ask follow-up questions if they desired or following the fireside chat the event could proceed immediately into audience Q&A. The fireside chat is meant to be informal in nature around the topics of cloud gaming and priorities for Microsoft in this area.

In addition, as the host of this event, the MS Library will need to take the following steps to ensure the event is supported from a Teams/AV perspective. Guidance is also provided around cadence for Q&A and questions to consider as you determine how the MS Library will want to staff and engage in this event.

* Visit Eventions AV site ([Eventions AV (sharepoint.com)](https://microsoft.sharepoint.com/teams/EventionsRedmond/SitePages/Eventions-AV.aspx)) to determine what AV support is needed. More than likely, the MS Library will want to use ***Teams Meeting Platinum*** services, which will support up to 250 online participants and supports remote participants and presentation. For more than 250 participants, M365 Live Event will be needed. Make sure to confirm that the event will be recorded and link to recording sent to LibArc staff in shareable format. Usually, the recording will be emailed to point of contact as a downloadable .mp4 format from a SharePoint site.
* Email [evention@microsoft.com](mailto:evention@microsoft.com) to be assigned an event planner. They will help guide you through the process and ensure you are set up for full AV/Teams support for the event. Make sure your event planner creates the Teams meeting link for you (rather than creating one yourself in Outlook). You can then use this link to post on Yammer, DLs, and other methods of communication.
* Cost for [Teams Meeting Platinum](https://microsoft.sharepoint.com/teams/EventionsRedmond/SitePages/Eventions-AV.aspx) service is $370 (up to 250 participants).
* Accessibility features include real-time transcription, captioning and translation and are offered by Eventions AV at an additional cost: 1-2 hours is $785 (see Accessibility section on this [page](https://microsoft.sharepoint.com/teams/EventionsRedmond/SitePages/Eventions-AV.aspx#accessibility)).
* Determine who will be monitoring chat for questions (suggestion: two FTE LibArc staff members).
* Determine whether to create a MS Form and ask for pre-submitted questions prior to event.

## Helpful links for hosts:

MS Library staff will need to create an NDA with Omdia, IBISWorld, and any other outside company involved in these events.

CELA Information Exchange Agreements / NDA Information: [Information Exchange Agreements (sharepoint.com)](https://microsoft.sharepoint.com/sites/CELAWeb-Contracts-And-Licensing/SitePages/Information-Exchange-Agreements.aspx)

Tips for NDA submission:

* From the Information Exchange Agreements page, click Legal Contracting Experience and then “Create NDA” (several existing contracts may come up but you will need to create a new one)
* Use the default selections in the NDA Template Details section
* Supplier/Second Party Details:
  + Omdia (Company)
  + Address: 5 Howick Place, London, SW1P 1WG, United Kingdom
* Microsoft Information:
  + Deal Owner: MS Library FTE Contact
  + CELA Contact: [Ann Cooper](https://whoplus.microsoft.com/Org/ANCOOPER)
* Signatory Information:
  + Signature Type: Electronic
  + Supplier Signer Full Name: Alexander Deschamps
  + Supplier Signer Title: Corporate Account Manager
  + Supplier Signer Email: [Alex.Deschamps@omdia.com](mailto:Alex.Deschamps@omdia.com)
* Click Continue and Review & Submit

Check with CELA Rep if you have any questions or concerns: [Find Contact (microsoft.com)](https://findcontact.microsoft.com/)

## Host Q&A

LibArc staff should have several back-up questions should no audience member ask a question (below are example questions for Omdia):

1. Can you tell us more about your background and how you became involved with this particular topic area and how long you have been researching cloud gaming?
2. Where do you see cloud gaming in the next 5 years? The next 10 years?
3. What is your favorite Xbox game to play?
4. Any insights into how Microsoft competitors view our products and services?

# Pre-Event Checklist

* Presenter deck reviewed by LibArc staff for quality assurance ten business days prior to event.
* Ensure that deck follows [Microsoft brand guidelines](https://microsoft.sharepoint.com/teams/BrandCentral/Pages/Help-FAQs.aspx)
* Ensure that any multi-media videos will play without sound/visual errors.
* Confirmed day/time with presenter one week prior and 24 hours before event.
* Confirmed arrangements with Teams Live recording crew 48 hours before event; make sure to confirm how they will handle technical issues from audience (e.g., is there a URL for viewing that can be pasted in the chat when event starts?).
* Checked to ensure correct Teams link is posted on Library portal, Yammer, other communication channels and was sent to presenter.
* Bios and photos of presenters obtained and shared via communication channels along with event announcement (with permission from presenters).

# Post-Event Checklist

* Follow-up Forms survey sent to all participants ([Example survey](https://forms.office.com/Pages/DesignPage.aspx?fragment=FormId%3Dv4j5cvGGr0GRqy180BHbR0MwGkIMtz9GqCys8VPGyiFUQko1R0RMSkJESk1RTEtRME5HR0xKNktMOS4u%26Token%3D9814ebd492634d39a084ea1041a7d7aa))
  + Attendee names captured on the survey (voluntary)
  + Business group, title, location
  + Survey to be sent out by MS Library staff in follow-up email communication same day as event and survey link to be posted in the chat five minutes before event ends.
  + *Sample questions*:
    - What was your overall impression of this event?
    - How satisfied were you with the content presented at this event?
    - Did you find the experts engaging to listen to?
    - Did you learn information that will help you in your role?
    - Would you attend another Expert Insights event hosted by the MS Library?
* Email to presenter(s) from MS Library FTE thanking them for participation
* Send presenter(s) MS Library swag bag if possible
* Recording of Teams event shared via Yammer and uploaded to library portal (content removed after two years)
* Debrief of Expert Insights event at next LibArc staff team meeting

# Measurements for Success

* Engagement during and after event measurements:
  + number of questions asked (10-15 would show high level of engagement)
  + response rate on follow-up survey (aim for at least 50%)
  + other feedback collected post-event via chat, email, Yammer
* Attendance at event over 50 employees
* Presentation skills displayed and quality of materials presented by expert
* Increase in traffic on library portal and with Omdia / IBISWorld sites

# Post-Mortem Questions

* How many hours were spent on this event planning from beginning to end and was the effort worth the result?
* Was time spent planning the event in excess of what would be expected while following this playbook?
* Did we receive 50% response rate from the survey and what was the general impression of the event from library users?
* How easy was it to secure commitment from Microsoft Executive?
* Did MS Library contacts and experts from third-party firms feel the event was successful?
* Did they feel the amount of preparation time was reasonable for this event?

# Future Topic Ideas

Should the *Expert Insights* program move forward, consider including the following future topic ideas in the ProResearch publication calendar:

* Future of Work/Modern Workplace: opportunity to provide technology-based solutions for future of work/hybrid workplace in a post-pandemic world.
* Responsible AI Partnerships
* Competition with China: How can we create opportunities to come out ahead in the race towards cloud infrastructure capabilities?
* Knowledge Management: opportunity to provide solution ideas for capturing knowledge before employee transition
* Digital Transformation: How can we do more with less as a company and for our customers?

# Appendix A: Presenter FAQ

***Can I get attendee names?***

We generally do not share names and emails to protect the privacy of Microsoft employees. This event is being shared on multiple channels and attendance RSVPs are not being tracked. We do expect between 50-100 employees to attend based on our promotions through our library communications channels. This event is not being promoted company-wide but target primarily to existing MS Library customers.

***Can I get a recording and share it publicly?***

We will share the recording with the Omdia team but we ask that you not share it publicly as it potentially contains confidential information pertaining to Microsoft and our partners.

***How is the event being promoted?***

The MS Library team will promote this event through multiple channels including email distribution lists, our Yammer channel, and our internal SharePoint portal. This event is not being promoted company-wide.

***Who will be attending the event?***

Primarily library customers and those subscribing to the library promotion channels mentioned above. We will not be tracking the exact number of people who will attend the event but expect to have at least 50-100 employees attend this event.

***Can we promote the event with our Microsoft base?***

Upon request, we can provide you language to share with your Microsoft base.

***Do I need to fill out an NDA form?***

Yes, a MS Library staff member will submit an NDA on your behalf and send to you for electronic signature prior to the event. See *Helpful Links for Presenters* for more information on how Microsoft is committed to Data Privacy.