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The Definitive Guide to Measuring Microsoft 365 Business Impact

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Table of Contents

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1. INTRODUCTION

As is typical for many technologies used in the enterprise, building the business case for Microsoft 365 usually comes down to three simple words: Return on Investment. Executives and technology evangelists alike constantly search for ways to quantify ROI, providing tangible proof that the money put into these technology solutions produces a worthwhile and measurable payback.

Certainly, Microsoft 365 is not immune to the basic laws of economics. Suppose the technology does not help increase company revenue, improve employee productivity or cut expenses. In that case, few executives will commit time and resources to deploy or invest in improving adoption and usage.

But while many can agree that measuring ROI is important, little consensus exists on just how to gauge the effectiveness of Microsoft 365 and its solutions.

This whitepaper is designed to provide practical advice for leaders who want to put Microsoft 365 to work but wrestle with the challenges of justifying its value after deployment. All corporate champions of Microsoft 365 deployment want to prove how the technology can pull its financial weight. The path to achieving this lies in understanding the variables that impact ROI evaluation. Some of the metrics discussed in this whitepaper may vary based on how you use Microsoft 365, but the economic principles remain the same. The economic principles

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boiled down to: Identify the business value generated by Microsoft 365 deployments and measure it against the costs of implementing these technologies or improving their usage.

2. MEASURING & IMPROVING BUSINESS IMPACT

Measuring the business impact is critical. There are a few key considerations for determining business impact and measuring that impact.

1. Identify ways Microsoft 365 can drive business impact.
    a. Just knowing that there is an impact is the first step.
    b. This whitepaper is meant to address and accelerate this step.
2. Measure the business impact.
    a. This should be done before Microsoft 365 technologies are implemented, while adoption/usage is being improved, after and during investment activities or as new capabilities are introduced.
    b. Within this whitepaper, we have provided suggestions for how you might approach measuring some of these business impacts.
3. Take proactive steps based on the measurements and insights shared.
4. Measure the business impact.
5. Repeat steps 1-4.

2.1. Establishing Your Baseline

Customers frequently ask, "what is a good adoption rate?" or "what should my target # of uses or % of user satisfaction be?". As you consider the measurement for each Microsoft 365 goal, keep in mind that there is no right or wrong number. Every organization has different definitions of value and success, varied employee culture for adopting new technologies, and other factors which will guide these answers.

For example, if we take something like Microsoft Teams, 1,000 meetings per month may be ideal for one company but low for another and excessive for another. Focus on defining the right metric for your organization by establishing your baseline, the current standard of operating today. It's critical to understand how your business operates today and where you want to go to establish baselines.

Another example is user satisfaction. Conduct a pre-pilot or pre-rollout survey to understand how satisfied users are with their current tools and processes. Your goal should be to sustain or increase that satisfaction rating through your rollout.

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You may have to find a qualitative metric - to serve as your baseline - that you capture by collecting stories or anecdotes to demonstrate the current problem. You may need to quantify the current problem through stories, anecdotes, interviews, surveys, and other qualitative measures. As long as you apply consistent assumptions in your baseline and post-project metrics, you should be in a good position to demonstrate a positive impact.

There are numerous baselines you should generate before implementing Microsoft 365. If you haven't yet gathered this kind of insight, then begin by looking at the business impacts outlined in this whitepaper. For each one, consider whether or not you have suitable baseline measurements in place today.

2.2. Measure Quantitatively & Qualitatively

Some quantitative measurements can be obtained automatically from native Microsoft 365 usage data and require third-party tools. Qualitative measurement approaches, often referred to as "soft" data, include stories, anecdotes, and future scenarios. When it is difficult to capture meaningful quantitative metrics (for example, at the beginning of a project), qualitative metrics can have a significant benefit. The best measurement programs incorporate both quantitative and qualitative measurement. The qualitative metrics - especially those that correlate with quantitative evidence - add additional depth and value to your metrics.

2.3. Define Measurements for Each Microsoft 365 Project

When you implement a technology solution or run a technology project, it is important to create and plan appropriate metrics to help track the project's efficacy and success. When deploying new Microsoft 365 workloads, you should also plan for appropriate metrics.

What follows is an example of how you would work through the metric planning process.

Metric Planning Sample

Your organization is going to roll out a new people search experience as part of their Intranet launch.

When rolling out this new capability, it is always good to start with a smaller pilot.

What follows are suggested considerations for measuring the success of a pilot around people/expertise search.

Identify and engage those who will participate (preferably your pilot users).

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- Ensure that those who agree to participate will create an expertise profile.
  - *Consider having a team of experts ready to help them create their expertise profiles and have associated time to review key profiles of leaders to ensure they are filled out correctly.*
- Ensure that those who agree to participate will query and search for expertise at least weekly in the course of their work.
  - *Consider asking participants to keep a diary or note the times they did expertise searching and follow up with anyone who hasn't shared their updated diary periodically during the pilot. This may create an opportunity to remind or further encourage expertise searching. Or it may help identify good stories/opportunities where expertise searching could help other participants or the broader user base upon pilot completion.*

Plan for the pilot to take place over a specific period.

- As a suggestion, for a smaller solution, doing a pilot over 90 days should provide adequate time to gather results and evidence of success. Shorter pilots may also result in success if you believe there is a clear need for the solution (meaning usage is more frequent).

Define your approach to metrics and measurement.

- In this scenario, tracking the number of queries performed and the number of profiles created would be a basic starting point.
- An initial baseline survey and a final survey would also be recommended.
- Interviewing participants to capture specific anecdotal evidence about the value of the tool is also recommended. In particular, look for scenarios where the participant can describe the problem effectively and where the new expertise search provided clear value.
  - You are looking for some baseline benefit analysis numbers to support your assessment of efficacy. How much time did they save? How much time would it have taken? What kind of costs could have been accrued if they hadn't been able to find that expert so readily?
  - Many stories discuss the value of finding a person with a skill that they didn't know existed in the company. In one story, the individual stated: "If we hadn't been able to identify someone with the right skills quickly, we would have

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avoided following up on a multi-million-dollar opportunity from the client out of fear and uncertainty as to whether we had the skill to do it."

- It's impactful quotes like this that will be remembered by those who review the results of any pilot. They allow stakeholders who aren't as involved or engaged to better understand the kind of impact new technologies or capabilities are having within the organization.

2.4. Using Surveys Effectively

One of the great ways to establish a baseline or provide progress on key elements of change management, adoption, or impact is to perform surveys with targeted users or groups of users. While broader audience surveys can also be helpful, they often cannot be as specific and lead to bias based on who responds to the survey (unless it is mandatory).

- Does your organization run an annual survey?
- Do you run an annual survey on collaboration, productivity or communication in your organization (or incorporate those kinds of questions into a broader annual survey)?
  - Do you publish the annual survey results (or collaboration, productivity or communication surveys) to users?
  - Do you communicate the actions you plan on taking or have taken in response to the feedback provided?

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3. UNDERSTAND & ALIGN BUSINESS OBJECTIVES

For a technology investment to be relevant, and for key stakeholders to care about that technology, it is critical to show that the technology has a positive impact on helping realize important business objectives.

It is often extremely difficult to map the technology solutions and uses we have for technology to business objectives. This is difficult for two key reasons. The first reason is that most business objectives are not specific enough, clear enough, or detailed enough. The second reason is that it can be difficult to visualize the relationship in a way that key stakeholders will immediately recognize.

3.1. Identifying Business Objectives

Everything starts with a business objective, requirement, or identified need. For any technology to have an effective impact, the purpose and its intended use must be understood. In the context of Microsoft 365, this means understanding what business challenges it is solving or supporting.

Often businesses focus on the technology and solutions when they discuss the impact and forget about how important it is to have the business provide clear objectives, priorities, and direction for the technology leadership to develop their solution roadmaps and multi-year technology strategies.

The biggest offender for these scenarios is when the business comes up with vague objectives like "enhancing collaboration" or "automating and improving business processes" and assumes that, by using these "positive" statements, it will provide the direction necessary for technology investments like Microsoft 365.

If you take the example of "automating and improving business processes," that objective is difficult to measure. How do you know when you have successfully automated and improved business processes? What kind of business processes are you automating and improving? Which business processes are we targeting? What specifically about these processes are the existing pain points/issues right now? By getting down to a much more precise level, it becomes obvious what potential solutions Microsoft 365 (or any technology) can provide.

While this may sound simplistic, it can be difficult to do this in an engaging way that encourages organizational participation and fairness. Often while you cannot get the complete

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agreement in a room, you can create a sense of shared understanding through the use of visual techniques. One such technique called *mind mapping* is visualized below as a sample of how vague or generalized objectives can be broken down into much more specific objectives through stakeholder participation.
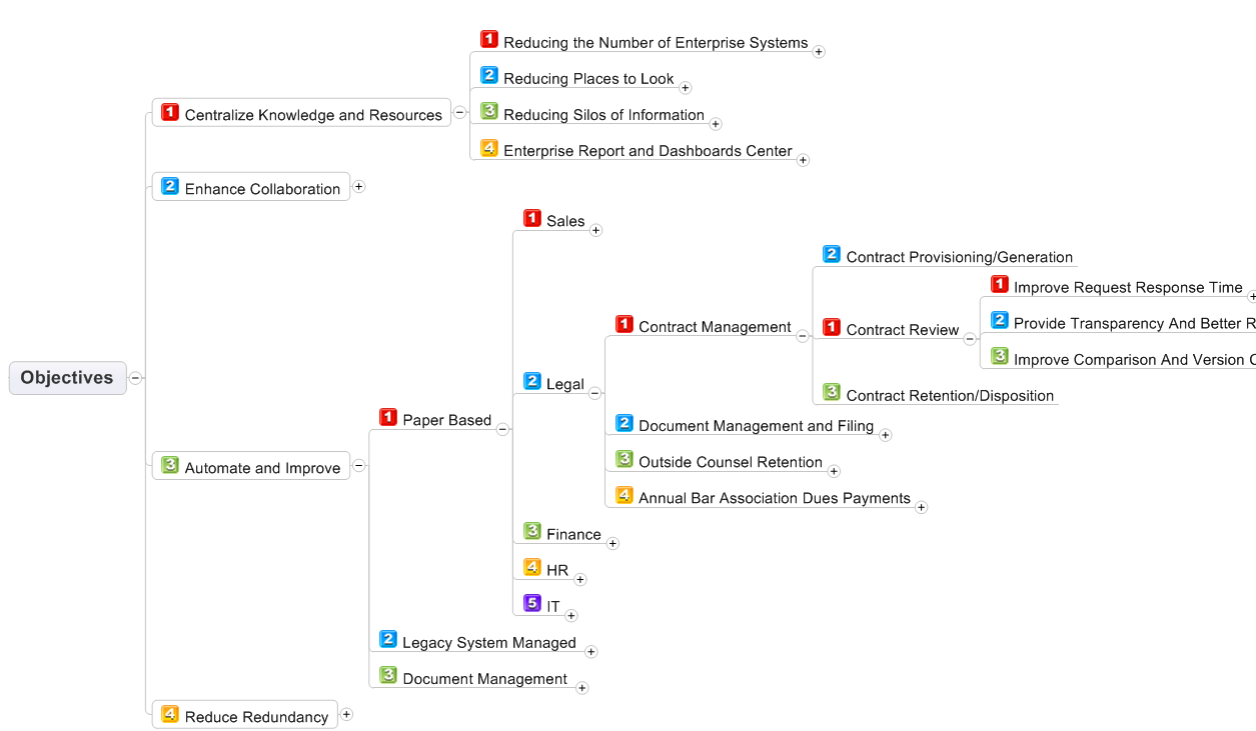
Figure 1 - A visual example of how these platitudes (or meaningless objectives) might break down into something that has meaning to the organization. This "mind map" was developed using Mindjet Mind Manager.

The only way to achieve a measurable level of success (and to be able to define clear solutions) is when we break down these vague objectives into real business concerns, issues, challenges, and pain points and then address them through technology leadership.

S.M.A.R.T. Business Objectives

In the earlier section on identifying business objectives, we focused on the importance of objectives being **specific.** S.M.A.R.T. is an extremely popular mnemonic acronym that gives a set of criteria to guide setting objectives. Ideally speaking, each corporate, department and/or team objective should be specific, measurable, achievable/assignable, relevant, and time-bound. What follows is high-level guidance on using this mnemonic acronym and some considerations around defining objectives.

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S for Specific – This criterion stresses the need for a specific objective rather than a more general one. This means the objective is clear and unambiguous, without vagaries and platitudes.

- **Why is this important?**
  This is the single most important consideration for an objective because, without objectives being specific, you can't effectively proceed with other criteria. In most cases, business objectives are not specific enough. Even if you fail to review your objectives against other SMART criteria, ensure you challenge or help them be more specific.
- **How can we improve this?**
  Consider asking probing questions like:
  - If you could imagine the organization, department, or team after X happens, what would be different?
  - Can you give me a specific example of a pain point that would be resolved by achieving or meeting this objective?
  - Can we break this objective down?
  - Is there a way we can categorize this objective?

M for Measurable – This criterion stresses the need for concrete criteria for measuring progress towards objective attainment.

- **Why is this important?**
  The thought behind this is that if a goal is not measurable, it is impossible to know whether a team is making progress toward successful completion. Measuring progress is supposed to help a team stay on track, reach its target dates and experience the exhilaration of achievement that spurs it on to the continued effort required to reach the ultimate goal.
- **How can we improve this?**
  Consider asking probing questions like:
  - What does this objective impact directly?
  - What does this objective impact indirectly?
  - What data do we have that relates to this objective?
  - How much of X improvement do we expect to see?
  - How many of X is needed to meet the objective?
  - How will we know when it is accomplished?
  - How can we track positive progress towards the objective?

       o   How can we track negative progress towards the objective?

A for Achievable – This criterion stresses the need for objectives to be either achievable (is it realistic given available and assigned resources).

- **Why is this important?**
  Having each objective be able to be assigned to an individual, team, or organization is important. It stresses who is needed to achieve the objective and potentially who is agreed in driving towards objective completion. "A for Achievable" could also be "A for Assignable," which means who will be the individual who leads the measurement of this objective and potentially is responsible for its attainment. Or it can be "A for Agreed", which is also an important facet for determining whether an objective is effective.
- **How can we improve this?**
  Consider asking questions like:
    - Who is involved?
    - Where would this objective be realized?
    - Who do we need to realize this objective?
    - Who can lead achieving this objective or tracking its achievement?
    - Do we have an agreement on the objective?
    - Do we have an agreement on how we should achieve the objective?

R for Relevant – This criterion stresses the need for ensuring that the objective is relevant and that achieving the objective would have clear and impactful (or meaningful) results.

- **Why is this important?**
  Sometimes we can define an objective successfully, but when it comes to prioritizing which ones we should focus on first, it can be a challenge. While there are other thoughts on this, we find that whether the objective matters or is relevant is a fair check that we should always do to assist in prioritization or help identify just how much of an impact the objective would have.
- **How can we improve this?**
  Consider asking questions like:
    - Why is this objective important?
    - If we didn't achieve this objective, what would happen?
    - Does this objective relate to other objectives (are there dependencies or benefits to doing prioritizing this one)?

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T for Time-Bound – This criterion stresses the need for ensuring objectives are trackable and have a clear time horizon.

- **Why is this important?**
  This ensures that objectives are specific enough to be measured as attained within a time horizon. This leads to better coordination and understanding around expectations on when we expect to be meeting an objective. It also goes hand in hand with the measurement of the objective. By making objectives specific enough and evaluating relevance, we can use this last criterion to determine a targeted date/time when we need to or would like to achieve or meet an objective.

- **How can we improve this?**
  Consider asking questions like:
    - When do we expect to start achieving or meeting this objective?
    - When do we need to revise the objective?
    - When do we need to know with assurance that we have achieved the objective?
    - When do we want to target for achieving this objective?

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3.2. Business Objective Mapping

When asked the question "why are you implementing a technology or creating a solution?" many people don't know how it will benefit the organization as a whole. If a solution targets improving how users act. "A" we need to validate that performing action "A" more quickly or accurately will have a meaningful impact on an important business objective. Otherwise, there are likely other, more important, solutions that individuals can be working on.

Tracking objectives is extremely important, but there is also importance around understanding how a solution or technology benefits the organization and what business objectives it helps to meet. Stating that a solution or technology solves a problem isn't enough. You have to understand what solving that problem means to the business. By aligning solutions and technologies to business objectives, you can properly prioritize whether to do "solution 1" or "solution 2" more effectively. It also greatly helps in getting stakeholder commitment as the objectives are important to leaders, but the specific problem may not be seen as a significant priority. Or it may not be understood by those same leaders/stakeholders.

So how do we show this kind of business alignment? One easy-to-describe method is to map the objectives in the table to specific technologies, solutions, capabilities, or business scenarios.

In the table to the right, we can see an icon of ● representing a direct relationship, which means that implementing and adopting Solution 1 will have a meaningful and direct impact on achieving Business Objective 1. The ○ represents an indirect relationship. Meaning that Solution 1 will also help achieve Business Objective 2, but it may not be critical or extremely impactful in driving progress towards achieving Business Objective 2.

	Business Objective 1	Business Objective 2	Business Objective 3
Solution 1	●	○	
Solution 2	○		○
Solution 3		●	●

Figure 2 - Sample of business objective and solution mapping.

The value of creating an objective mapping table, like the one explained above, is that with a glance, we can see exactly how the Solutions map to Objectives. This can also help with a broader value priority (remember, priority is based on value and difficulty). If, as a stakeholder/leader, Objective 3 was the most important objective for me, I would rather the team or organization prioritize implementing Solution 3 first. Or, at a minimum, I may want to

understand better how Solution 3 is helping achieve Business Objective 3. This leads to stakeholder involvement and enables you to explain the business impact you will have by implementing a new solution or getting better adoption around a specific technology.

	Technology 1	Technology 2	Technology 3
Solution 1	●		
Solution 2	○	●	
Solution 3		●	

Figure 3 - Sample of technology and solution mapping.

The same table format for Solutions and Objectives also could be used to identify technologies leveraged or critical to specific solutions. On the left side, you might have solutions listed, and along the top, you might list technologies that enable those solutions or ones that are directly leveraged by the solution. Doing this allows you to identify from only two tables how a technology or platform does in fact, improve business objectives (by enablement and leverage).

High-Level Walkthrough Of Business Objective Mapping

Let's walk through an example of this exercise together. I am an organization that sells and repairs cars.

Where do my business objectives come from?

Typically, business objectives start from a vision statement or mission for what the organization is striving towards and breaking down what that means into several major business objectives. Often many people in the business will be able to identify what the business objectives are for you. Or it should be easy to come up with some of your own objectives that ring true for the business as a whole.

Our Sample Vision Statement:

To offer our customers the most affordable, best-valued cars while providing them with a complete car maintenance solution and unrivaled customer service.

Business Objectives:

- o   Improve Customer Service
- o   Improve Sale of Cars
- o   Improve Sale of Maintenance Services

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Those are some very generalized objectives. They certainly aren't specific or "S.M.A.R.T". But that may be similar to the objectives you have in your business, so let's use them as our starting point. Johnny in the Technology Department comes up with a couple of wonderful solutions for our car company.

Johnny's solutions are:

- o Implement a File Sharing Solution that will enable salespeople, customer service people, and maintenance people to share information more easily.
- o Implement a Mobile Workforce Solution that will enable employees to communicate via wireless devices anywhere in the company building.
- o Implement a Sales Tracking Solution that will help track all sales providing better visibility and forecasting.
- o Implement a Maintenance Inventory System that will help track tools and maintenance supplies.

How do these solutions map to the objectives of the business?

First, Johnny needs to understand better how those objectives should be broken down. The only way to do that is to understand how the business works and what they have to do to be successful today. When Johnny explores how customer service works, by doing interviews and exploring their usage of other legacy systems, he finds some challenges today. These challenges include being able to share maintenance reports and customer service templates with each service representatives. Many of the customer service representatives believe it would make their tasks much easier if reports and templates were easier to access and share.

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Based on this insight from the customer service group, Johnny is confident that the new file sharing solution will positively impact customer service. It will reduce the number of steps required to share resources and grant users access to see and share information they previously couldn't utilize.

Johnny uses the business objective mapping approach, mentioned earlier in this whitepaper, to show his bosses how these solutions benefit the organization and relate to those objectives. This will allow them to prioritize the solutions based on their immediate business needs easily. And this map may initiate a deeper conversation specifically around how they believe the solutions will impact those objectives, which can lead to more specific objectives and a better breakdown of those broader solutions mentioned above.

	Improve Customer Service	Improve Sale of Cars	Improve Sale of Maintenance Services
File Sharing Solution	●	○	○
Mobile Workforce Solution	○	○	○
Sales Tracking Solution		●	●
Maintenance Inventory Solution			○

Figure 4 – Simplified example of technology-based solutions mapping to business objectives.

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4. BUSINESS IMPACT BY MICROSOFT 365 CAPABILITY

This subsequent section will outline examples of business impact and how they correlate to key apps and services provided by Microsoft 365.

At this time, we have mapped examples and correlations between the following technologies:

Microsoft Teams: The unified communication and collaboration platform that combines persistent workplace chat, video meetings, file storage and more.

Microsoft Yammer: The connection and communities' platform combines communication, questions and answers, live events, social networking and more.

Microsoft SharePoint: The content services, knowledge, and communications layer that houses intranets, extranets, sites, and solutions.

Microsoft OneDrive For Business: The service and app for individual file sharing, management and access within an enterprise.

Microsoft Outlook: While Exchange and more provides the services this ubiquitous tool centrally provides effective scheduling and messaging support.

Microsoft Power Platform: The Power Platform is comprised of PowerApps, Power Automate, Power Virtual Agents, Power Portal, and Dataverse.

Microsoft Viva: The Microsoft employee experience & engagement platform is comprised of Viva Connections, Viva Topics, Viva Insights & Viva Learning.

Microsoft Stream: The seamless video experience for communicating, sharing, connecting, educating, and engaging with video across an enterprise.

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The following are examples of business impacts that can be measured and suggestions for which technologies would be applicable for the business impact. Each technology alignment has been as either a filled circle to show a direct relationship (●), an empty circle to show an indirect relationship (○), or blanks to show difficulty in identifying a measurable relationship between the impact and technology ( ).

Business Impact	T	Y	S	OneDrive	O	Power		Arrow
Reduced Technology Costs	●	●	●	●	●	●	●	●
Reduced Travel Expenses	●	○	○				○	●
Improved Process Efficiency		○	●			●	○	
Saved Employees Time	●	●	●	●	●	●	●	●
Preserved More Institutional Knowledge	●	●	●	●			●	●
Improved Employee Satisfaction	●	●	●	○			●	●
Reduced Hiring Costs	●	○	○				●	●
Improved Training Relevance	○	●	●				●	●
Improved Compliance Support	○	○	●	○			●	●

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5. BUSINESS IMPACT EXAMPLES

The following are categories of business impact that Microsoft 365 influences and suggestions for measuring each one. Our intention with this approach is to help organizations understand that these benefits can be quantified and that it may not be as challenging due to richer availability of data and insights that the Microsoft 365 platform can directly provide.

Throughout these measurements, it's important to understand that each customer is unique. Here are a few high-level suggestions when you calculate your own ROI:

- We often **calculate real-world numbers using estimates for** the **inefficiency of productivity or cost transfer** as not every resource that gets time back will be able to apply it to productive benefits for the organization at the same efficiency level.
- **Never do single-point estimates.** A range is extremely valuable as it communicates confidence. If it helps, consider creating a low, medium, and high value for each if a range won't work for your decision criteria. Even with further discounting for risk, if the low value is a favorable investment with a good return, that should be enough for the business decision.
- **Measuring over time is important.** We are cautious about doing multi-year ROI calculations where we don't discount the benefit over time since digital patterns, industry patterns, and your own employee patterns change over time.
- **Keep track of all your assumptions.** If someone disagrees with your calculations or is not confident in them, you can always input different assumptions or let them experiment with your model (Excel is great for this). Disagree with the suggested salary or cost of the employee? Just change those values to create more variations or professional perspectives on the ROI parameters.

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5.1. Reduced Technology Costs

This is the most obvious and immediate benefit from a cloud technology implementation. By shifting technology workloads to the cloud, costs can be avoided in the initial and ongoing costs of maintaining on-premise software, including hardware, software, and qualified staff to support its needs. When combined with its Azure-based capabilities, it also avoids additional challenges of securing data while providing users with flexible remote access.

What Microsoft 365 Capabilities Can Influence This?

Business Impact								
Reduced Technology Costs	●	●	●	●	●	●	●	●
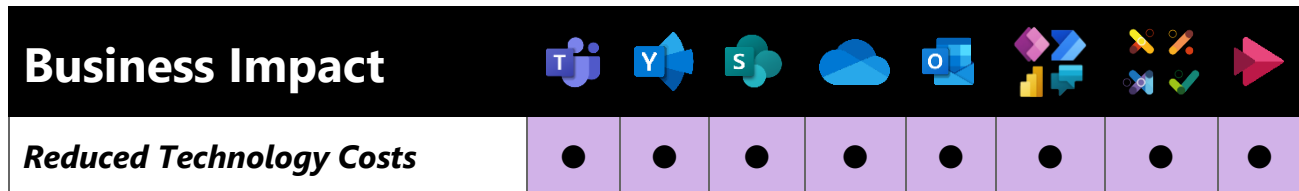
How May This Be Realized?

There are many reasons running or powering your organization on Microsoft 365 saves money and delivers more value for the technology investment. Here are a few of the most significant technology cost reasons.

1. **Infrastructure Cost Savings**

    There are significant costs to maintaining a highly available server farm for equivalent Microsoft-powered services on-premises. Especially when hardware investments are necessary, it also requires a team with knowledge and specialized skills to maintain the infrastructure and application.

2. **No More Upgrades**

    Once you are effectively leveraging Microsoft 365, there are no significant upgrade costs or cycles. Your users can use new features and updates as they are released. That doesn't mean there isn't a cost every few years as you look to optimize your communications, messaging, portal, knowledge management, project management, and social experiences across the organization. Still, it does mean that your investments will be focused on activities that drive more value instead of infrastructure or technical upgrades.

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3. Pay Per User Per Month

Microsoft 365 licensing plans are based on assigned active users. This enables you to pay based on usage of the platform and adjust your user count based on changes in your business.

4. Price Bundling & Pricing Innovation

Microsoft 365 bundles the suggested capabilities you would leverage with Microsoft 365 in-suite pricing that includes capabilities your organization will most likely or already has a need for such as Messaging & Calendaring (Exchange Online), Communication & Collaboration (Microsoft Teams), Intranets & Document Management (SharePoint Online), Search (Microsoft Search), and Enterprise Social (Yammer) to name a few.

5. More For Your Money

Microsoft 365 provides additional capabilities like Ready-To-Go experiences that are extremely valuable in the bundled suite pricing such as a Enterprise Streaming & Video Portal as well as a series of emerging experiences like Microsoft 365 Knowledge Management via Viva Topics, "Employee Experiences" that enhance the Intranet, Microsoft Teams or connect people to content and information that matters to them (Viva Connections), Task & Project Management (Planner), Learning Management & Social Learning (Viva Learning), Personalized Insights (Viva Insights) and Business Intelligence Portals (Power BI for Microsoft 365).

What is included in the suite pricing continues to improve with more and more new capabilities being added that are critical to your organization and can augment other costs. Another example of this might be the level of Mobile Device Management that is built into Microsoft 365.

6. Empower & Accelerate Solutions On An Integrated Platform

Power Platform is pre-integrated into Microsoft 365 and is even provided at an entry-level for each user in the suite licensing options available today. The proven impact that Power Platform has is incredible.

Microsoft provides no-code/low-code application development solutions via the Power Platform that help its customers speed up application development and empower both pro developers and non-developers (citizen developers) to create applications better and faster.

For example, prior to using Power Apps, organizations often use traditional tools for all application development, and only "high-code" developers are engaged in these activities. This means a large, ever growing, backlog of IT projects, and developers never translate many business ideas into system improvements because the cost and effort are too high. Adopting Power

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Apps transform the IT function from one perceived as a blocker to an Enabler because it enables the business to accelerate application development responsibly.

This benefit also directly impacts IT development efficiency. Using the Power Platform solutions often make certain development activities such as front-end development and automating workflows much faster than when completed using traditional development tools. Additionally, using the plethora of integrated services within Azure increased code reuse and automation, saving developers time. This means the development team can deliver much more value to the organization without increasing their team size. This allows the organization to avoid additional labor costs while getting more out of the resources you already have.

How Could We Measure This?

Direct benefits quantified typically include the initial and ongoing cost savings associated with avoiding the investment in software, hardware, and IT support personnel that would have been needed to deliver the same increase in productivity associated with the move to Microsoft 365.

Not included in many calculations are the increased productivity delivered by Microsoft 365, as quantifying both the gains and the cost avoidance would be double-counting the same benefit. For those kinds of gains, we have covered differing approaches in the other business impact sections.

On the Power Platform side, this could be measured in a few ways, such as looking at the application development costs, eliminated vendor costs, or increased efficiencies.

You could measure the average cost to develop an application before the use of Power Platform and after. Typically for applications that can be developed using these new tools and included connectors, the internal development effort, professional services fees, and/or vendor applications, purchase costs are much lower. A Forrester TEI report suggested that the average cost to develop an application is 74% less with Power Apps[1].

On the efficiency front, since these applications often digitize existing manual and often paper-based activities, efficiency gains can be measured through productivity improvements (how long did related activities take before the automation and digitization, and how long do they take now).

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[1] The Total Economic Impact™ Of Power Apps

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Keep in mind that you can also measure significant improvements in ongoing maintenance costs. Today you can measure how much the IT department spends in maintaining and developing solutions. When those are built with Power Apps and the Power Platform you should see a significant cost of maintenance decrease.

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5.2. Reduced Travel Expenses

In many organizations today, the costs associated with traveling to conduct business-related activities can be significant. Many see travel expenses as one of the necessary costs of doing business. But what could your company be doing to help reduce those costs? Implementing Microsoft 365 can significantly help reduce travel expenses in several ways.

What Microsoft 365 Capabilities Can Influence This?

Business Impact	T	Y	S					
Reduced Travel Expenses	●	○	○				○	●
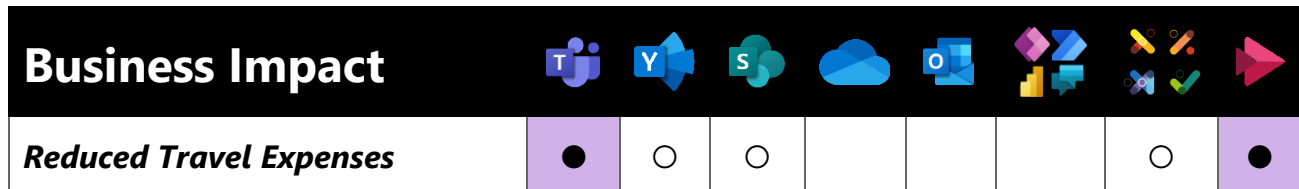
How May This Be Realized?

Online video, online meetings, and virtual conferences can be used to deliver a consistent message in an engaging manner, allowing employees to forego road trips to attend in-person company meetings, summits, and training sessions. The savings realized from keeping employees off of airplanes and out of hotel rooms, taxis, and rental cars are substantial and grow exponentially when reused numerous times over an extended period in Microsoft Stream. This is especially true as it relates to onboarding employees by reducing travel-related time expenditure for both participants and presenters. Beyond the hard-dollar expenditures associated with travel, employees also save time – and, hence, are more productive – when they stay close to home. Employee time wasted in airports, waiting in security lines, and dealing with flight delays all add up.

How Could We Measure This?

By measuring the baseline of employee travel costs in a period before and after implementing a technology, you can determine the potential impact in cost savings the technology has had. Additionally, when you factor in related organization changes and seasonality, take the remaining amount and assume that other factors are not accounted for by only assuming a certain percent of the amount is attributable to the technology implementation or investment. Typically, this variance ranges from 20-60% of the estimated amount. Where Microsoft Teams and Microsoft Stream are noted to have the most meaningful and direct impact (as they both heavily relate to meetings).

Calculate how much time workers spend in transit and estimate the value of the work that employees could have completed in that time. One easy method is to tally the total salary and benefits paid to workers for time on the road beyond the time spent engaged in training sessions.

Holding virtual events in place of previously physical ones like virtual conferences can also be a way to isolate the costs and measure the impact. Many of the same measurement methods are applicable. The reduced costs around the event (since there is no need to travel) is the first number that should be calculated. Once this is understood, you can still perform surveys or ask for evaluations based on the pre-recorded sessions. The difference in satisfaction (if lower) may suggest that the reduced costs are not worth the same amount (since the efficacy may be diminished), but in many organizations that did not record or share previous internal conference sessions – the impact is much greater and suggests greater efficacy.

Tracking attendee engagement can be difficult in an in-person event (beyond evaluation forms), but engagement levels can be tracked much easier in Yammer and Microsoft Stream. This improved visibility can enable more interaction with speakers and allow for greater networking and linking, especially for remote or excluded employees who would not have participated in the event. To understand the impact, each virtual event/conference should determine how they will measure their desired impact/outcomes, then tie these outcomes to measurements in Yammer, SharePoint, and Microsoft 365 that can help indicate impact and any financial measures identified.

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5.3. Improved Process Efficiency

Improvements to business processes and business process automation are by far the most significant and measurable contributors to Microsoft 365 ROI beyond technology cost reduction. On the surface, this is most applicable to SharePoint and workflow activities but is applicable from a broader perspective in the way that Microsoft Teams, Yammer, Outlook, OneDrive for Business, Delve, Office, or Microsoft Stream all create opportunities where a process could be improved by using their capabilities.

What Microsoft 365 Capabilities Can Influence This?

Business Impact	T	Y	S	☁	O	📊	✏	▶
Improved Process Efficiency		○	●			●	○	
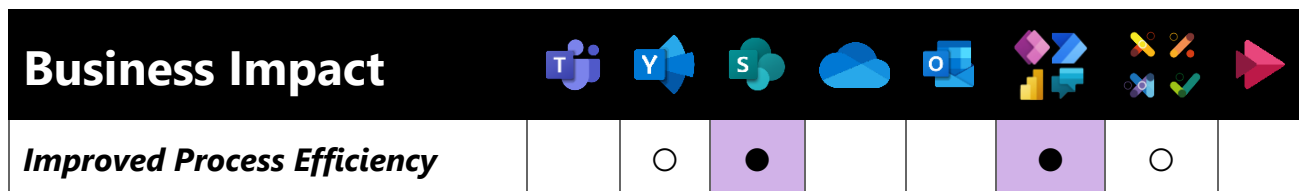
How May This Be Realized?

To improve a process, it is important first to understand it, and to have identified pain points and challenges within the process. Once these two requirements have been met, you can break the process down and outline ways to improve by leveraging capabilities within Microsoft 365. The most notable capability set in Microsoft 365 that impacts processes are the features found in the Microsoft Power Platform (Power Automate), Microsoft Teams, and SharePoint Online. These features (when used right) can often reduce the time and effort it takes to do many activities within the enterprise.

Here is a simple example of how Excel capabilities with SharePoint online might improve a process.

Often when employees work with Excel spreadsheets that require input from many parties, there can be a need to collate reports, merge datasets, and some reports may need to be updated simultaneously. Doing this using email, file shares, or other less efficient mechanisms will result in a missed opportunity to improve productivity. A shared excel document in a SharePoint library or Microsoft 365 group that supports co-authoring and/or a SharePoint list that represents the same data often will result in reports taking less time to update, reduce management costs for the report, and can improve visibility or frequency of updates (as it may have been done weekly, or monthly using alternative approaches.

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It's important to note that both Power Platform and capabilities in SharePoint Syntex also have a significant impact on improving process efficiency. For example, with SharePoint Syntex, companies train models to recognize business data and extract and classify structured and unstructured data. Automatic form processing and metadata extraction reduces manual processing efforts and saves between $541,435 and $1.3 million[2].

How Could We Measure This?

Determine your business objective first. Let's say your business objective is to reduce the amount of time it takes to execute a specific task. The first thing you need to do is get a baseline measure for the current process. You can use some techniques, ranging from asking the people who are doing the job today to timing them either informally or with a time and motion study.

If users had to spend 8 hours completing one report previously which was collated and prepared once a week. Now, due to a workflow or better technology usage the report can be done in 2 hours or automatically as users perform the related tasks – a marked and measurable improvement was made.

Many of Microsoft 365 projects involve using the technology to assist or help automate and improve an existing process or workflow. Consider how a small team supporting the organization in this effort would prioritize which processes and workflows they should focus on.

To determine which projects to work on, you could calculate a baseline metric for executing the process before Microsoft 365 or SharePoint impacts it. One way of doing this is by measuring process throughput, and another is by observing the time it takes to do a task. Based on this it should be possible to estimate the process or throughput times expected in the "after" situation based on the improvements planned with Microsoft 365 support. This can then be multiplied by the number of times the process is executed in a year and then calculated based on an average fully loaded hourly cost for employees involved.

The initial calculation helps prioritize which projects to work on. Then, to ensure that the solutions deliver the expected value, we recommend the team go back to each project after about 90 days and measure actual results. These new metrics help provide insight into potentially repeatable solutions for other business areas.

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[2] New Technology: The Projected Total Economic Impact™ Of Microsoft 365 Knowledge & Content Services

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While the metrics are not precise measures of ROI because no costs are analyzed, since the same approach is used for all projects, the result provides a repeatable calculation that can be used to establish priorities and disseminate best practices, which are important elements of an overall measurement program.

There is a great example of a simplified formula for measuring process improvement by [Sarah Haase](#). In essence, you measure the time it takes to complete a single iteration of the process and times that by the number of iterations and an estimated hourly rate to determine the current costs of the process. You then calculate that same process cost once you have made improvements and compare the difference.

This approach can be used to predict continued benefits as well such as a reduction in manual effort and metadata processing for a few sets of documents with SharePoint Syntex could be abstracted in terms of it's longer time savings based on an estimated percentage of all organizational documents that fit those document sets and accounting for minor retraining/calibration costs for the models.

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5.4. Saved Employees Time

At the end of the day many improvements to productivity map to giving employees time back, or allowing employees to focus on more important tasks. In essence, this is the act of saving an employee time by improving how they work, their options, or the way in which we communicate and collaborate.

What Microsoft 365 Capabilities Can Influence This?

Business Impact								
Save Employees Time	●	●	●	●	●	●	●	●

How May This Be Realized?

There are a number of ways in which Microsoft 365 can save employees time. Here are a few examples:

1. **Faster access to knowledge.**

    Often employees, especially information workers, spend time each day searching for files and content to be used in their daily activities. Reducing the time it takes to find and discover content can save your employees time and enable them to do more productive activities. Providing a way to search for specific types of documents, making it easier to know where to look, automatically discovering relevant content and recommending it to the user all improve the speed and accessibility of corporate knowledge. What's more, implementing successful Intranets can have a big impact here.

    While search and intranets or structured team sites are common examples of saving employees time, even improving a directory structure can go a long way. In most file shares there are many nested sub-folders. In SharePoint, when metadata is effectively used it saves time by avoiding users needing to review and click through the hierarchal navigation.

    This is further amplified by solutions that bring the knowledge to the employee in the context of their work. With Viva Connections, key curated Intranet experiences are brought to the user in Microsoft Teams.
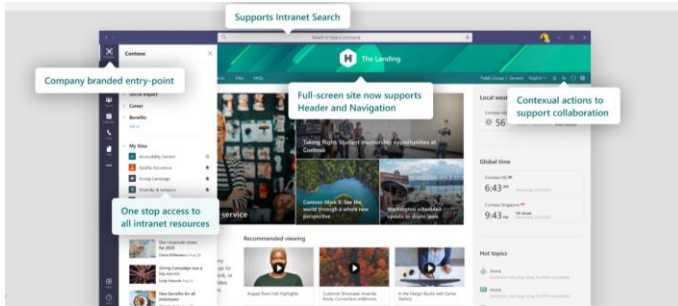
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Figure 5 - Viva Connections In Teams

Whether the employee is in Outlook, Teams, SharePoint, the Office applications or other key digital workplaces with Viva Topics the knowledge can come to them. This optimized content discovery reduces time previously lost in inefficient search efforts and can save employees between 1 and 3 hours each week[3].

2. **Reduce demand on presenters, time-shift business communications and increase the frequency of communication.**

By reducing the cost of a presenter's time. In addition to employee salaries, consider the strategic value that comes from extending the reach of a single presentation by an executive, a training instructor or a business leader. Rather than having a top executive or an expensive training resource travel from company location to location to deliver a consistent, standardized message, all employees can access the same content via a single video production, live in a Microsoft Teams meeting or viewed on-demand. By reducing the time needed to communicate their message, executives and leaders can focus more attention on addressing their primary business tasks.

By time-shifting business communications, more employees can view and gain the benefit from it, and they can avoid conflicts with other job duties. Consider the value associated with time-shifting business communications. Attending a live event may conflict with other job duties. On-demand alternatives enable employees to view the same message at a more convenient time.

Additionally, organizations can leverage streaming to increase the frequency of top executive messaging to employees. Repeated communications give workers a better understanding of the management's vision for the organization. This potentially helps boost productivity.

3. **Optimizing Information Architecture & Group Structures**

Sometimes the structure of information and communities can improve business impact. As an example in Yammer, we would suggest that fewer, larger groups contribute to better and more effective content consumption (generally speaking). Measuring the

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[3] New Technology: The Projected Total Economic Impact™ Of Microsoft 365 Knowledge & Content Services

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activity levels and memberships of groups can support identifying opportunities to merge these groups. Effectively reducing noise and potential confusion from similar groups.

Consider the number of search results that turn up when you search for a topic in search today. After cleaning up the content and adding additional metadata compare the improved result set. Each time you make the result set more tailored or consumable to users you are helping them save time.

Another example would be the saved time resulting from taking distinct documents in document libraries and collecting them in an easy-to-navigate wiki.

4. **Improve meeting coordination.**

   Presence monitoring in Microsoft Teams enables employees to see when their colleagues are online so they can more quickly initiate communications. Shared calendars often have been a particularly valuable feature for managers, who can now view team members' available times online and schedule a meeting in one step instead sending out and reviewing multiple meeting requests and responses.

5. **Improved usage of document templates and document sharing.**

   In many organizations, some documents are regularly created, and that follow a similar pattern. Creating a document template library that users can access and leverage to create new documents can save time at a team or departmental level. At an organizational level identifying the types of documents in use can support not just the development of document templates, but the design of improved search experiences and information protection.

6. **Reduced time spent due to email inefficiencies.**

   Reading email messages that aren't targeted to you takes time - time that could be spent focused on your critical tasks. Also, un-targeted emails have a cost to the organization regarding mailbox storage. Transferring even a small portion of the "All" emails to targeted SharePoint news or announcements, Yammer conversations or announcements, or Microsoft 365 groups can have a direct positive impact on productivity and email cost.

   If you are looking for a great way to estimate the cost related to email, take a look at [*The Hamster Revolution*](#)*. Within this book, they estimate that if you send and receive as few as 60 emails per workday and spend on average 2 minutes per email, that you are spending a total of 60 days per year just on email.*

   Additionally, when users reduce the number of email attached documents that they send it prevents duplications of documents and brings contributors and readers to a

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single document source which tracks changes, provides version history, enables co-authoring and significantly saves time in managing, coordinating and tracking changes/feedback.

How Could We Measure This?

To measure employee time savings, it requires understanding how much time an activity or task would take before Microsoft 365 helped facilitate a new way of working. By comparing the time, energy and costs it takes after the change to the previous baseline, we can indicate an approximate value for how much time Microsoft 365 has saved.

While this may sound simple, this is one of the most complex things to track. Many organizations use anecdotal evidence and qualitative stories from employees to present how they have changed or improved how they work. In these scenarios, it can communicate how the quality of work and work experience has improved, and if the measurement can be added to quantify some of those improvements, it may be possible to make an assumption for other similarly situated users/roles.

Example: *A story around how a manager in a has 30 minutes more each day to focus on other things. This is outlined as a result of not having to track people down for their availability and the time saved by recording their meetings, so they don't have to repeat meeting content. If we know how many other managers in the organization would have similar needs and responsibilities, we could estimate that any number of managers we can prove are using these methods (by meeting video upload count/frequency and surveys on usage), are also gaining a similar benefit.*

This means that if we identified 80 other managers with similar needs who are using these new methods and assumed a conservative savings of 20 minutes for each manager a day it would result in 1,600 minutes of time saved each business day. There are 260 business days a year, suggesting a potential savings of 416,000 minutes per year or just about 6,934 hours. If we can also identify an average hourly rate of $34.00 representing the manager cost, we could come to a potential savings of 235,756.00 per year.

The point is not to determine an exact value with time saved, but an approximate amount to provide evidence that even if the value was grossly overestimated, it would be well worth the training, education, and awareness activity investment or technology investment that may be required.

5.5. Preserved More Institutional Knowledge

One of the important steps that an organization can take is improving its knowledge management programs. Knowledge management can be used to describe numerous initiatives, but the central goal is to preserve institutional knowledge.

Organizations spend a lot of time and resources developing knowledge and capability. While some of it gets translated into procedures and policies, most of it resides in individual managers and functional experts' heads, hands, and hearts. Over time, much of this institutional knowledge moves away as people take on new jobs, relocate, or retire. Knowledge also degrades when a new senior executive or CEO introduces a different agenda that doesn't build on earlier knowledge or contradicts what was done previously. And knowledge disappears even more rapidly when a firm reorganizes or merges with another, and there is a subsequent reshuffling of the staff.

Specialized information is the lifeblood of many organizations. Established practices for handling production snags on the factory floor, for instance, are handed down from shop veteran to rookie and can play a key role in keeping a production line rolling. These solutions sometimes are developed only through experience – experience that can suddenly disappear if a key employee leaves the company for any reason. SharePoint, Yammer, Microsoft Stream, and Microsoft 365 Groups are all tools that organizations can use to capture the unique set of knowledge held by workers and institutionalize the employee-to-employee sharing of that information.

What Microsoft 365 Capabilities Can Influence This?

Business Impact	T	Y	S	☁	O	📊	✶	▶
Preserved More Institutional Knowledge	●	●	●	●			●	●

How May This Be Realized?

There are countless ways that Microsoft 365 improves the preservation of institutional knowledge. Here are a few examples:

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Automatic discovery and recommendation.

Automatically discover and recommend connections to topics, documents, sites, teams, people, questions, and their answers is possible today with Microsoft Viva Topics. This means that human moderation and involvement is streamlined and able to produce far more relevant knowledge and resources to users where they already work while AI regulates and recommends content and topics to keep the organization current and provide adaptive and dynamic results. As an example, this AI assisted content classification and curation could result in savings of $1.2 million to $3.3 million.[4]

Because this comes to the user where they already work (in Teams, SharePoint, Office, Outlook etc.) it also significantly improves productivity. Conservative estimates suggest that this could save employees between 1 and 3 hours each week, avoiding time previously lost to search efforts. [5]
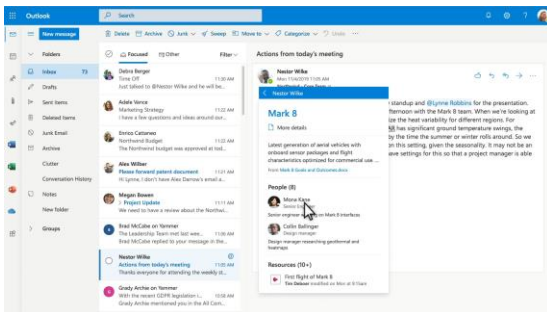

Figure 6 - Viva Topics in Outlook

Employees are working out loud.

Having employees work out loud can create new opportunities for other employees to gain value from the information shared or the conversations and discussions that sharing sparks.

Recording exit interviews and award interviews.

Another example of how you can get unexpected value is by standardizing the use of recording Microsoft Teams meetings when conducting exit interviews of employees as they leave the organization. Whether or not they are recognized as key employees at the time of their departure, the interviews provide a valuable record of the scope of their duties. Alternatively, making an interview process a part of awarded employee activities can be a great way to capture some insights into how an employee did more or achieved more so that others can replicate or learn from their accomplishments. This

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4 & 4 [New Technology: The Projected Total Economic Impact™ Of Microsoft 365 Knowledge & Content Services](#)

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can easily be shared on the Microsoft Stream portal and surfaced throughout Microsoft 365 (like on your Intranet) via embedding options available.

Improve the reuse of best practices across the enterprise.

Sharing and capturing best practices in a SharePoint site, Yammer group or throughout Microsoft 365 can enable the organization to replicate successful business practices in all geographies.

How Could We Measure This?

One way to track the impact of working out loud is to count the number of messages that were responded to by users who were not @mentioned in Yammer. This shows the number of people who would not have been able to respond, participate, add, or gain value if the conversation had been in email.

If you can connect this to a few user stories where a user explains or outlined how this serendipitous response from someone helped them in concrete terms, it can act as a qualifying example.

Consider the ROI of preserving institutional knowledge by comparing it to the cost of insurance for your operations. Identify at least a portion of your total bill for insurance designed to mitigate the cost of a catastrophic event at one of your facilities. When institutional knowledge can be distributed more readily to more employees, it is akin to buying another form of corporate insurance. And its value should be reflected accordingly.

One possible metric for a best practices library or collection is to track the number of times the library or site has been accessed. A larger number of accesses or "hits" for the library or an individual best practice page/document suggests that people are reading and referencing this. This does not definitively indicate whether the content was useful to anyone or whether it improved operational efficiency or quality. It is possible to get a better measure of value for the best practices content by enabling ratings with a clear context for the ratings (a good rating means you were able to reuse this) or by extrapolating conversations referencing the document from Yammer.

When this additional data is combined with the view/usage data for the best practice content, it can indicate the frequency of use and its potential value. Lastly, a user survey could be used in combination with the approaches above to seek out specific cases where the best practice information helped and how it was used – because this would provide specific examples that stakeholders and other users can relate to (and share with others).

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Gathering anecdotes can be a labor-intensive process and may require some creativity to obtain. You may want to consider a success story contest (with prizes) to get Microsoft 365 users to share high-quality success stories.

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5.6. Improved Employee Satisfaction & Engagement

Employee Satisfaction is a measurement of an employee's "happiness" with current job and conditions; it does not measure how much effort the employee is willing to expend. Employee Engagement is a measurement of an employee's emotional commitment to an organization; it takes into account the amount of discretionary effort an employee expends on behalf of the organization.

Within your organization, is a yearly survey done? These surveys can support this activity by providing visibility to how engaged employees feel by asking various questions.

What Microsoft 365 Capabilities Can Influence This?

Business Impact	T	Y	S		O			
Improved Employee Satisfaction	●	●	●	○			●	●
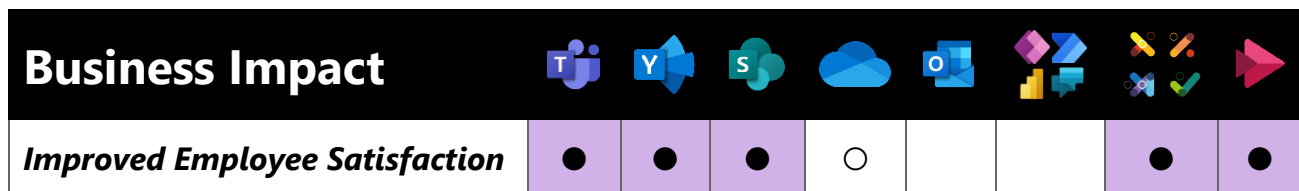
How May This Be Realized?

Evaluate employee satisfaction surveys and employee turnover rates to determine if increased use of the technology is impacting the number of employees retained by your organization in a given year.

Often, standardized or consistent messaging can improve employee understanding, trust, and alignment with organizational priorities. One-to-many video presentations allow management to inform employees about corporate initiatives. Video allows top executives to convey their message to global workforces fast, with maximum engagement and authenticity that nearly matches an in-person presentation.

Job satisfaction is also about employee well-being and managing productivity. It's here that Viva Insights can have a significant impact. Empowering employees to champion changes, highlight digital metrics to their managers, or improve how they manage their digital connections and daily activities.
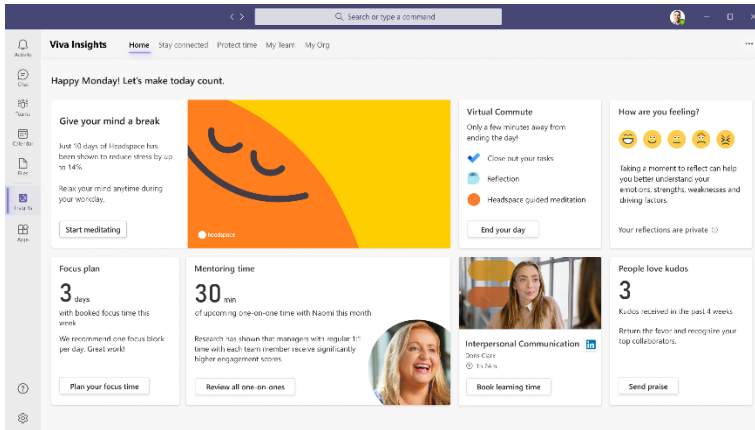
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Figure 7 - Microsoft Viva Insights

How Could We Measure This?

Suppose you are able to link a reduction in employee turnover to the adoption of a technology (by employee surveys and feedback collection). In that case, you can make the ROI tangible by multiplying the costs of hiring a new worker (identifying candidates, management interview time, and on-the-job training for new employees) by the number of employees saved per year.

The benefits of satisfied employees who align with strategic messaging are powerful but are not necessarily easy to measure. One way to gauge the value of such messaging in our is to assume that remote workers become at least 0.X% more productive once they develop a better understanding of the organization's goals and strategy, communicated by management. Multiplying that 0.X% by the total salaries and benefits paid to remote workers who view an executive broadcast meeting, participate in executive YamJams, or can connect with leaders gives an estimate of the potential financial benefit associated with improved employee satisfaction with the corporate strategy.

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5.7. Reduced Hiring Costs

By employing creative recruiting strategies in tandem with the latest technology developments, you can reduce recruiting costs while driving exceptional business results.

What Microsoft 365 Capabilities Can Influence This?

Business Impact	T	Y	S					
Reduced Hiring Costs	●	○	○				●	●

How May This Be Realized?

Use video to capture interviews of job candidates that can be shared internally. Have HR personnel conduct and record opening interviews of job candidates, sharing videos of the best prospects with relevant hiring executives. (Videos could be generated from in-person interviews and from the capture of online interviews conducted via webcam conversations enabled by services such as Microsoft Teams.)

The ability to review videos saves time in the interviewing process by allowing hiring executives to see and hear prospective candidates for themselves before scheduling a follow-up interview with the candidate. The video approach also eliminates the inefficiencies of scheduling interview time and coordinating appointment calendars when multiple top-level executives or managers are needed to approve a prospective job candidate.

By pre-screening videos, hiring executives may be able to winnow a field of four candidates offered by the human resources department to two finalists before even conducting second-round interviews.

What's more, Viva Topics plays a valuable role in onboarding new employees, reducing their time-to-productivity, and helping embed them into the collective knowledge of the enterprise more quickly. This accelerated time-to-productivity could total between $9.8 million and $17.1 million for an organization of 40,000 knowledge workers.[6]

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[6] New Technology: The Projected Total Economic Impact™ Of Microsoft 365 Knowledge & Content Services

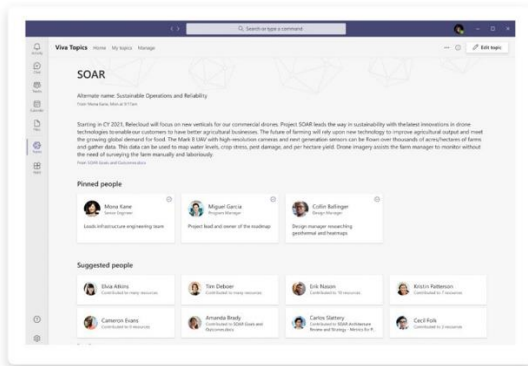YOU WILL LOVE THE WAY WE WORK.
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Figure 8 - Viva Topics Pages

How Could We Measure This?

Calculate the ROI of this application by identifying the actual number of interview candidates eliminated by hiring executives during the video review round and then tally the resulting value of executives' time saved along with any reduced travel costs realized when out-of-town candidates are removed from consideration.

When calculating time-to-productivity, you can evaluate (by role, department, or business unit) how long an employee is estimated to be non-productive while they ramp up. Then you can calculate how this changes once Viva Topics, effective Intranet investments, social and dynamic learning with Viva Learning, onboarding automation with Power Platform, and other Microsoft 365 capabilities have impacted this metric.

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5.8. Improved Training Relevance

The corporate ideal would be to have staff in place that is well-versed in all aspects of business operations. This level of worker expertise is difficult to attain. More realistic is a working structure that provides employees with training and reference material on-demand that they can access to learn about a relevant product or best practices as needed.

What Microsoft 365 Capabilities Can Influence This?

Business Impact	T	Y	S	OneDrive	O	Planner	Power	Power BI
Improved Training Relevance	○	●	●				●	●

How May This Be Realized?

Within most organizations, a resource/knowledge hub for learning exists. These hubs should exist in multiple technologies using the power of community engagement in a social platform like Yammer and the content management and communication capabilities in a SharePoint site. These centers of excellence or knowledge hubs contain how-to guidance, common errors, questions, answers, and training material.

How Could We Measure This?

Suppose you have measurements of the time it took to educate your user base before creating the resource/knowledge hub. In that case, you could compare this with the time it takes as the knowledge hub gets more actively used and becomes more meaningful/helpful within the organization. One way to track this is to have coaches or trainers track how long they sit with users teaching them a topic.

After adding this topic and supportive materials to the resource/knowledge hub, they refer users to this material and then schedule a follow-up – the time saved as a result of this is savings related to the usage of the knowledge hub. While this is indirect (as Microsoft 365 houses the knowledge hub), it can still be used to provide related evidence for the value Microsoft 365 provides.

One way to measure "just-in-time" training is to identify the value of customer contracts closed in a short timeframe after a sales representative views a product instruction video in the

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Microsoft Stream portal. If "just-in-time" options enable your organization to forego more generic training sessions not applicable to any specific project, a second way to gauge the benefit comes in tallying up the hours in productivity savings that result from irrelevant training sessions that can be eliminated for training content that is accessed when needed.

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5.9. Improved Compliance Support

Knowing that non-compliance is a non-option, companies have shifted their focus from the costs of non-compliance to the costs of compliance. Microsoft 365 has some significant compliance features that can offset compliance costs, while at a business level by performing certain activities through the platform.

What Microsoft 365 Capabilities Can Influence This?

Business Impact	T	Y	S		O			
Improved Compliance Support	○	○	●	○			●	●
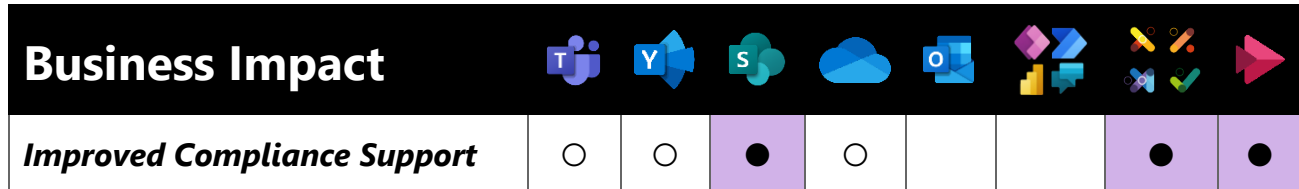
How May This Be Realized?

In highly regulated industries such as financial services, insurance, and healthcare, new regulations are released on a regular basis. This necessitates a steady flow of training sessions and compliance material to be shared to keep employees aware of compliance rules.

You could use SharePoint services, but with Viva Learning, you can also assign and track the completion of the consumption of key presentations, documents, videos, course work, or more.
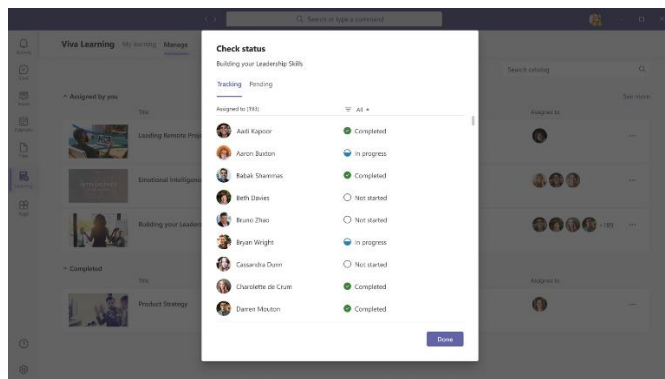
Figure 9 - Viva Learning Status

How Could We Measure This?

While online video and SharePoint sites provide a venue that simplifies the process of delivering frequent compliance training sessions to many employees, its greatest ROI contribution results from how the technology can be used to track employee viewership patterns. Suppose an organization can show evidence that an employee watched a training

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video, or read a document. In that case, such records demonstrate an organization's engagement in educating its workforce and provide a tool to demonstrate that they were not negligent even if one of their employees ultimately winds up violating compliance rules.

Such information may help an organization limit its liability exposure and avoid bad outcomes. As such, we suggest that ROI value of compliance training conducted via streaming, and shared resources could be measured by identifying a value amount based on the costs for liability insurance used to insulate an organization from compliance risks.

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6. KEY TAKEAWAYS

Measuring "return on investment" is important to managers and leaders seeking to win approval for the deployment of Microsoft 365 in the enterprise. As discussed in this whitepaper, a myriad of approaches can be used to justify the benefits that result from Microsoft 365 usage and adoption. Ultimately, executives and leaders should expect to stitch together a series of these ROI rationales relevant to their organization when justifying their proposed budget for Microsoft 365 implementation, adoption, and improvement activities.

This whitepaper is designed to be a starting point in an organization's ROI evaluation journey. While extensive, the suggestions listed here should not be viewed as the only way that the return on Microsoft 365 can be measured. Each organization will have a different set of business objectives and key performance indicators. And some of these may spark more creative thinking that leads to additional innovation in ROI measurement.

Your journey in identifying hidden ROI will be easier once you recognize the unique and growing role of collaboration, productivity, and communication technologies like Microsoft 365 in boosting operational performance. Identify the benefits that accrue from making Microsoft 365 more reliable, ubiquitous, and easy-to-use, and you will have a head-start on the path to identifying the value that it generates for your organization.

We hope you are inspired by the stories of other organizations being successful with driving real business impact in Microsoft 365. And we hope you will also share your story as loudly and as broadly as you can in the future.

NOTE: We tried throughout this whitepaper not to highlight our services, but this is a subject we are passionate about and help many organizations with. Please do not hesitate to give us a shout at Hello@2toLead.com if you are interested in getting some additional advice or assistance from our team of experts, it never hurts to ask.

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7. RESOURCES

We leverage our many years of expertise to put together these whitepapers. We have learned from our awarded-efforts and alongside our friends in the Microsoft 365 community. We like to highlight both in the section below.

7.1. Our Whitepapers & Related Resources

A few of our popular (and comprehensive) whitepapers:

The Definitive Guide to SharePoint Online and 2019 Migrations

This 70+ page whitepaper has over 100 different questions that your organization should be able to answer, your migration vendor should be able to answer, and your migration partner should be able to answer, along with essential insights you should consider.

Core Whitepaper Topics

- o Business Drivers For Migration
- o Migration Planning, Migration Strategy & Migration Roadmap Planning
- o Risks To Success

Most Common SharePoint and Teams Sprawl Issues and How to Find Them

This eBook covers 8 of the most common sprawl issues organizations face today. These issues plague organizations everywhere, and solving them is crucial to increasing employee time and cost. Not only will you gain insight into the ways you can solve these issues, you will also learn why these issues matter to both IT and end-users.

Core eBook Topics

- o Understanding Digital Workplace Sprawl
- o The Most Common Sprawl Issues and How to Solve Them

Microsoft 365 Intranets: What You Need To Know

This 160+ page whitepaper has everything you need to know to successfully leverage Microsoft 365 Intranets and Digital Workplaces and amplify internal communication and collaboration to new heights.

YOU WILL LOVE THE WAY WE WORK.
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Core Whitepaper Topics

- o   Understanding Microsoft 365 Communication and Collaboration Tools
- o   Benefits of a Microsoft 365 Intranet and Digital Workplace
- o   Best Practices Across Technology, Design, and Leadership

Driving Microsoft 365 Adoption & Usage: What You Need to Know

This [70+ page whitepaper](#) outlines all of the key considerations when planning and improving Office 365 technology and end-user adoption.

What to expect

- o   Driving Adoption Best Practices
- o   Comprehensive Guidance On Building An Effective Adoption Campaign
- o   Adoption Activities Checklist

Many other great resources and samples can be found and are regularly posted on our resource site at http://Office365Resources.com.

7.2. Recommended Industry Perspectives

There are great reports and articles on what's new in Intranets, what is innovative, and what makes for an award-winning Intranet. Are you looking for more interesting perspectives on what makes a good Intranet? Be sure to check out the latest trends in popular annual reports like [Nielsen Norman report on Intranet design](#), [Step Two's report on Intranet Innovations,](#) which is well worth reading. We are humbled to have brought together a team of Neilson Norman, Step Two, and various other award winners, along with other incredible industry professionals.

Tipping our hat to other industry experts

As we mentioned, we have also learned alongside some talented experts that we have crossed paths with on more than one occasion in the community in general or at the many Microsoft 365 events globally. We would like to shine a light on them here.

[Susan Hanley](#)

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"Sue is a recognized expert in the design, development, and implementation of successful portal solutions, with a specialization in Microsoft SharePoint. Since 2015, Sue has been recognized as a Microsoft MVP for Office Apps and Services. She is a frequent writer and speaker on the topic of building effective collaborative portals, portal governance, user adoption, and information architecture, as well as building communities of practice and measuring the value of knowledge management investments."

Michal Pisarek

"Michal Pisarek, CEO of Orchestry Software, is a Microsoft SharePoint MVP, an award that is given to experts in the Microsoft SharePoint community for sharing their passion, technical expertise, and real-world knowledge. Acknowledged as a thought leader in the SharePoint space, he is a frequent speaker at many international events and has been referenced in publications and presentations by organizations such as Gartner and StepTwo."

Joanne C Klein

A key area Joanne focuses on "... is the Microsoft 365 tools built to help organizations protect, retain, and secure their unstructured content now being produced at an exponential rate. This is an important shift for organizations and their information workers to make in today's modern, digital workplace."

Vlad Catrinescu

"Vlad is also a Microsoft Most Valuable Professional (MVP) since 2013 and has his own blog at https://VladTalksTech.com. He also shares his knowledge by speaking at conferences around the globe and at local community events. Vlad is often featured as an expert on other industry-related websites and blogs."

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8. About 2toLead

2toLead has been labeled as a generous Microsoft consulting company by its clients and employees. 2toLead employs trusted, passionate and experienced consultants who work hard to solve the most challenging business and technology problems that face our clients.

Awarded Experience, Here to Help

Whether you are reinvigorating your Microsoft 365 digital workplace or thinking about starting your journey, Microsoft 365 is a sure-fire way to improve digital communication and collaboration.

Microsoft 365 out of the box is already a massive step in the right direction, but the advantages can be astronomical with the proper guidance. We would love to be the consultants who help guide you to your optimal digital workplace. Our team is ready to show you that "*You will love the way we work. **Together.***"

Top 3 Ways 2toLead Helps Customers

INCREASE ADOPTION by going far beyond just deploying things right and ensure your organization is being pro-active in getting the maximum value out of your technology investments.

IMPROVE EXPERIENCES & ENGAGEMENT by understanding where, how, and why users interact with your business while building world-class portals, social networks, and websites that your customers, partners and users love.

LEVERAGE THE CLOUD to reduce costs, improve business agility and capabilities inside and outside of your organization by leveraging cloud technology like Office 365 and Azure.

For more information:

- Visit our website at 2tolead.com
- Follow us on LinkedIn
- Like us on Facebook
- Follow us on Twitter @2toLead

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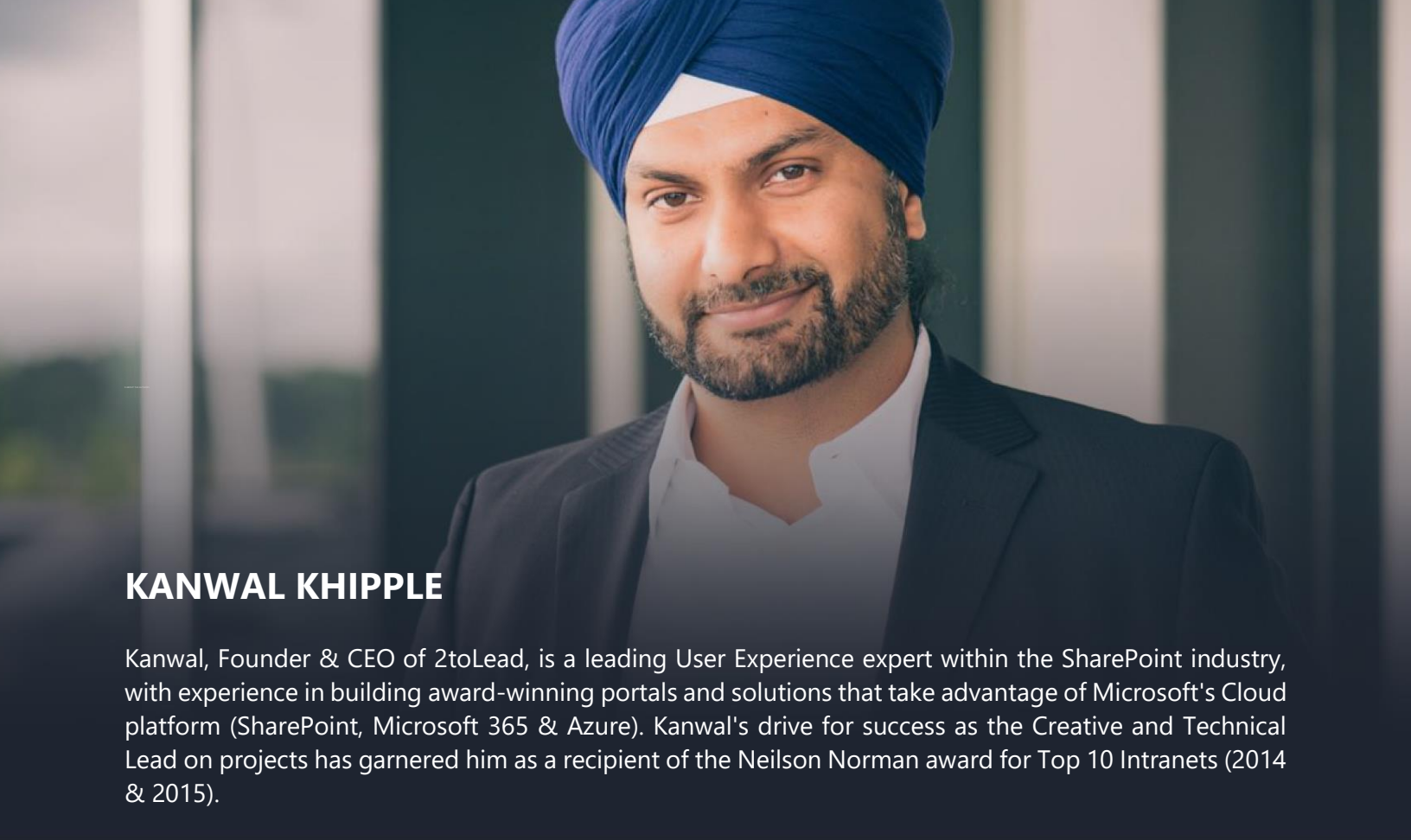
KANWAL KHIPPLE

Kanwal, Founder & CEO of 2toLead, is a leading User Experience expert within the SharePoint industry, with experience in building award-winning portals and solutions that take advantage of Microsoft's Cloud platform (SharePoint, Microsoft 365 & Azure). Kanwal's drive for success as the Creative and Technical Lead on projects has garnered him as a recipient of the Neilson Norman award for Top 10 Intranets (2014 & 2015).

Kanwal's passion lies in continuing to push for user experience innovation when redesigning intranets for the majority of the largest brands in the world. He continues to preach on the importance of designing with usability as the primary focus. Kanwal's thirst to share knowledge has made him a prominent figure within the SharePoint community. Because of his passion and his involvement in many community driven events including launching successful user groups in Canada and the USA, Kanwal has been recognized as a SharePoint MVP by Microsoft (2009 to 2013) and most recently as an Microsoft 365 MVP (2014-2016). He's also co-authored a book on Pro SharePoint 2013 and Responsive Web Development http://amzn.to/sp2013rwd

Feel free to reach out to him if you'd like to discuss your project, want to run an idea by him or just want to reach out to a friendly technologist.

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RICHARD HARBRIDGE

Richard is the Chief Technology Officer and an owner at 2toLead. Richard works as a trusted advisor with hundreds of organizations, helping them understand their current needs, their future needs, and what actions they should take to grow and achieve their bold ambitions.

Richard remains hands-on in his work and has led, architected, and implemented hundreds of business and technology solutions that have helped organizations transform both digitally and organizationally. Richard has a passion for helping organizations achieve more; whether it is helping an organization build beautiful websites to support great content and social strategy, or helping an organization leverage emerging cloud and mobile technology to service better their members or the communities that they serve.

Richard is an author, MVP and an internationally recognized expert in Microsoft technology, marketing, and professional services. As a sought-after speaker, Richard has often had the opportunity to share his insights, experiences, and advice on branding, partner management, social networking, collaboration, ROI, technology/process adoption, and business development at numerous industry events in around the globe. When not speaking at industry events, Richard works with Microsoft, partners, and customers as an advisor to business and technology, and serves on multiple committees, leads user groups, and is a Board Member of the Microsoft Community Leadership Board.

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BORIS BAITSOV

Boris has a mission to constantly deliver exceptional work and to never shy away from big challenges. With a background in molecular genetics, management, and technology innovation he works with customers to develop better technology strategies, prioritized business objectives and clear requirements.

As a senior consultant aligned with Communications, Media and Technology, Boris delivers high-tech solutions and software to a variety of companies and industries. He's helped design and deliver innovative sales origination software for frontline Financial Advisors, tested and deployed novel public transportation fare-payment systems, and helped create cloud-based CRM solutions for Commercial Leasing and Investing organizations.

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JUST THE BEGINNING

We have **helped over 100 organizations** build stronger Digital Workplaces.

With the guidance of our **Multiple Microsoft MVPs & Neilson Norman Award Winners**, we would love to show you how we can elevate your Intranet and Digital Workplace.

Your journey to a better digital workplace starts with a **Free 2-Hour Assessment**, with no obligations or commitments, of your digital workplace.

GET MORE OUT OF MICROSOFT 365

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