

The Definitive Guide to Employee Experience with Microsoft 365, Viva, and Copilot

How to Improve Retention, Employee Engagement & Performance

WRITTEN BY | Richard Harbridge & Kanwal Khipple



WHITEPAPER

You will love the way we work. Together.™

Table of Contents

Introduction.....	7
What is the Employee Experience & Why it Matters	9
What Is Employee Experience?	9
Key Aspects or Environments of a Great Employee Experience	11
Cultural	12
Technology Or Digital	13
Physical	16
Why Is Digital Employee Experience So Important?	17
Benefits Of A Good Employee Experience	18
Increased Performance	19
Higher Engagement.....	19
Lower Absentee Rates	19
Greater Employee Satisfaction	19
Higher Quality Work.....	19
How To Measure the Success of Employee Experience Initiatives	20
Basic Trends for A Positive Employee Experience	20
Being Empathetic.....	21
Flexible Working Options	21
Employee Feedback.....	21
Better Culture	21
More Learning Opportunities	21
A Sense of Belonging.....	22
How much should you spend on enhancing the employee experience today?	22
Why do Microsoft 365 & Microsoft Viva Matter?	23
Reason #1: Boost Employee Engagement	23
Reason #2: Built For Hybrid & Mobile Work.....	24
Reason #3: Enable Greater AI & Automation	25

Reason #4: Improve Wellbeing & Retention	28
Reason #5: Remain Secure & Compliant.....	29
Reason #5: Provide More Consistency	29
Why does Microsoft Copilot matter?	31
Employee Communication Experiences	31
Accelerate and Optimize Communication with AI.....	32
Accelerate and Optimize Collaboration with AI	35
Accelerate and Optimize Management with AI.....	37
Use AI for Summarization and Simplification of Communication.....	39
Use AI to Provide Research Assistance	40
Use AI to Provide Intelligent Recaps.....	43
Use AI to Help with Tone Awareness and Messaging Style.....	47
Use AI to Provide Writing Support in the Flow Of Work	49
Use AI to Provide Suggestions and Recommendations.....	50
What key things do Microsoft 365, Viva, and Copilot bring to the Employee Experience?	56
Viva Amplify	56
Microsoft Viva	58
Viva Goals	58
Viva Insights.....	59
Viva Topics	60
Viva Connections	61
Viva Amplify	62
Viva Learning.....	63
Viva Engage	64
People In Viva	65
Viva Pulse.....	66
Microsoft & GLINT.....	67
Microsoft Loop.....	68

Microsoft Search	68
Microsoft Teams.....	70
Power Platform	70
SharePoint.....	71
Yammer.....	73
Microsoft Copilot.....	73
Microsoft Places	75
Understanding Each Stage of the Employee Experience.....	78
Stage 1 - Pre-recruitment or attract.....	79
Stage 2 - Recruitment or hiring.....	79
Stage 3 - Onboarding	80
Stage 4 - Engagement	80
Stage 5 - Performance	81
Stage 6 - Development.....	81
Stage 7 - Departure	82
Stage 8 - Post Departure or Alumni	82
How Microsoft 365 and Microsoft Viva Impacts Each Stage.....	84
Stage 1 - Pre-recruitment or attract with Microsoft 365 and Microsoft Viva	84
The Microsoft 365 Advantage	84
Collaborate & Engage At Scale.....	84
Stage 1 Highlights & Stats.....	86
Stage 2 - Recruitment or hiring with Microsoft 365 and Microsoft Viva.....	87
Pre-onboarding or Pre-boarding Experiences	87
Streamline The Interview Process.....	88
Stage 2 Highlights and Stats.....	90
Stage 3 – Onboarding with Microsoft 365 and Microsoft Viva	91
New Employee Onboarding Assistance, Icebreaking & Badging.....	91
New Employee Onboarding Targeting, Sites, Teams & Communities	93

Stage 3 Highlights and Stats.....	98
Stage 4 – Engagement with Microsoft 365 and Microsoft Viva	99
Viva Engage Communities & Storylines	100
Viva Insights & Glint.....	101
Stage 4 Highlights and Stats.....	103
Stage 5 – Performance with Microsoft 365 and Microsoft Viva	104
Connect Work To Outcomes & Elevate Team Performance.....	104
Pro-active Support For Continual Transformation	105
Stage 5 Highlights and Stats.....	108
Stage 6 – Development with Microsoft 365 and Microsoft Viva	109
Connected, Collaborative Learning With Microsoft Viva Learning	109
Support Growth & Learning With Centers For Excellence	110
Stage 6 Highlights and Stats.....	112
Stage 7 – Departure with Microsoft 365 and Microsoft Viva	113
Forms, Surveys & Interaction Opportunities.....	113
Clarity On Impact Even On Exit	113
Stage 7 Highlights and Stats.....	115
Stage 8 - Post Departure or Alumni with Microsoft 365 and Microsoft Viva	116
Alumni Extranet Portals & Experiences.....	116
Manage Alumni Communications.....	117
Stage 8 Highlights and Stats.....	118
RESOURCES	119
Our Whitepapers & Related Resources	119
Ideas That Will Transform Your Digital Employee Experience	119
Most Common SharePoint and Teams Sprawl Issues and How to Find Them	120
Microsoft 365 Intranets: What You Need To Know.....	120
External Sharing With Office 365: What You Need To Know .	Error! Bookmark not defined.
"When to Use What" In Office 365	120

Measuring the Business Impact & ROI of Office 365	121
Driving Office 365 Adoption & Usage: What You Need to Know	121
Recommended Industry Perspectives.....	122
Tipping our hat to other industry experts.....	122
About 2toLead.....	123
Awarded Experience, Here to Help.....	123
Top 3 Ways 2toLead Helps Customers	123

Introduction

For many organizations, employee experience can mean different things to different people. Regardless of how you describe or define it, almost everyone agrees that improving it should be one of the top priorities in every organization today.

So how does an organization successfully plan, outline, and drive change in their employee experience? We all want a strategy that results in not just an improved employee experience but a strategy that gets us there faster, with less cost, and with less risk.

Within this whitepaper, we will explore how to improve your employee experience strategy based on the following key questions:

1. What is the Employee Experience, and why does it matter?
2. Why do Microsoft 365 and Microsoft Viva matter?
3. Why does Microsoft Copilot matter?
4. What key things do Microsoft 365, Viva, and Copilot bring to the Employee Experience?
5. What are the stages of an Employee's Employee Experience?
6. How do Microsoft 365 and Viva impact each stage of the Employee Experience?

There are important things that leaders or stakeholders should understand before they begin on a journey of improving the employee experience.

- **Setting expectations for the employee experience must always be based on the provable ways the organization works.** This may seem obvious, but employee experience dissatisfaction is often driven by employees having unmet expectations. In an effort to attract employees, many organizations set unrealistic or ambiguous expectations for employee experience (especially on the culture side), so it is always more optimal to use evidence/examples to set employee experience expectations. Instead of saying we value work-life balance, highlight with specific and real examples how you measure this, how you proactively support it, what systems and processes are in place, and more.
- **Employee engagement is an essential aspect of employee experience.** The employee experience directly affects how engaged and satisfied employees are. Measuring employee engagement is one of many great ways to better understand how the employee experience is changing for better or worse.
- **Our employee experience strategy must always see employees as humans, not as resources.** Understanding that human experience matters just as much, if not more, than processes is critical.

- **The employee experience starts before the employee is hired and lasts after they depart.** Most methodologies frame the cycle needing to represent seven stages of recruitment, onboarding, engagement, performance, development, and departure. Two areas many orgs underestimate how much influence they have on are the pre-recruitment and post-departure phases of an employee's journey. We see it as a 9-stage journey based on the importance of those additional or extended stages.

What is the Employee Experience & Why it Matters

[92% of employers](#) have identified that enhancing the employee experience is an important priority and plan to improve employee experiences within the next three years. So, with so many organizations prioritizing EX, it is essential to understand what employee experience is, why it matters, and how it impacts an organization.

In this section, we will help you understand:

- [What Is Employee Experience?](#)
- [Key Aspects or Environments of a Great Employee Experience](#)
- [Why Is Digital Employee Experience So Important?](#)
- [Benefits of a Good Employee Experience](#)
- [How To Measure the Success of Employee Experience Initiatives](#)

What Is Employee Experience?

[Employee experience](#) relates to the impact a workplace has on an employee. The experience comprises every touchpoint and interaction an employee has in an organization. This can range from human interactions to how a system works.

Employee experience encompasses several aspects. Some include:

- How an employee feels
- Employee perception
- Employee wellbeing
- Impact of the organization on an employee's life

Employees have more expectations of employers than ever before. Employees want to be engaged and feel like their job makes an impact and that an organization values them. They also desire career progression and development opportunities.

The employee experience is more important than ever for employers to consider. Today, employers are competing for employees more than ever, and employees are rethinking what they should expect from their employers.

Luckily, companies are waking up and prioritizing the employee experience more than ever.

*"... we're seeing a "great EX awakening" — one that has **92%** of organizations prioritizing EX enhancements over the next three years. This figure is up from **52%** prior to the pandemic."*

– [2021 Employee Experience Survey Highlights – WTW \(wtwco.com\)](#)

Key Aspects or Environments of a Great Employee Experience

So, how do you create a great employee experience? What steps are needed to adjust operations to incorporate an employee experience strategy? In his book ["The Employee Experience Advantage," Jacob Morgan](#) has led the way with great explanations for how these interwoven and reinforcing environments might be broken down, so let's use that as our foundation.

The Three Environments That Impact Every Employee Experience



©Jacob Morgan (thefutureorganization.com)

Source: The Employee Experience Advantage

["The Employee Experience Advantage," Jacob Morgan](#)

Businesses should focus on three main areas or environments that impact employee experience:

- Cultural
- Technological
- Physical

When approaching employee experience, we must consider what we can change and influence. At the end of the day, an organization is responsible for improving the work environment so that employees can have the best experience. These environments are interwoven and all-important, but with the continued shift towards hybrid work, the importance of a physical workplace environment has decreased, and cultural and technological advantages have become more evident.

Cultural

Company culture is how connected teams feel within an organization. Culture also represents how employees think about the company and customers perceive a business. A great, positive culture can create an excellent reputation for a business.

Culture is grounded in shared values, visible in day-to-day practices, exemplified by the words of leaders and managers, and actuated in the organization's processes and structure – the "vibe" of the workplace.

Companies should create a culture around making employees feel valued and appreciated, which will go a long way in developing a better employee experience. Employers should align the organizational vision and experience strategy with cultural values. Doing this the right way can impact motivation, performance, and satisfaction.

The problem with the cultural environment is that many see it as largely intangible, and thereby while it can influence employee experience, it can be harder to action.

The reality is it can be tangible, and there are concrete ways to improve it. Still, it requires being far more specific about the cultural expectation and current work pattern so that the gap between the two becomes easier to identify and improvements or solutions are easier to define.

So how do we improve our cultural employee experiences?

Cultural environments can be improved by aligning your employee experience with your purpose, brand, and the culture you want to create. While this may sound simple, it is pretty complex because you reinforce the culture you want by proactively planning, optimizing, and understanding how moments in an employee's journey signal the kind of culture you want or the kind of culture you don't. We must optimize the employee experience and how they interact with your culture. This includes how an employee is onboarded, how their performance is reviewed, how they are recognized, how they recognize others, how we interact and treat an employee as they move on or retire, and much more.

For example, let's say you want to establish a culture that encourages and celebrates collaboration. This would be a great idea as it's something every culture should probably do in today's world of increasing velocity, volume, and variety of collaboration needs. For example, look at something like an employee's quarterly review (optimally, not a yearly performance evaluation). You could see if the questions you ask beyond the obvious ones, such as "what kind of business impact have you had," provide sufficient focus on how others have helped you and how you have helped others.

Validating questions like these ensure that understanding how we help others and how they help us is part of crucial performance discussions. This is strategically valuable for every manager, as most know what impact a direct report is having but do not know its effect on others or who is impacting their direct reports.

- What have you done that has had a **positive impact** on the team, business, or customer results?
- What have you done that leverages **the work of others** in our organization?
- What have you done to contribute to the **success of others**?
- What contributions have you made in any **special projects**?
- What personal contributions have you made towards your **self-development**?

The above is an example of something we can evaluate, something we can take clear action against, and something we can measure in a few ways. If we ask employees if they feel the performance process encourages our cultural values and then break down what those values are and how people feel about them, it is extremely likely we will see a positive increase in experience from the change outlined above.

Technology Or Digital

Technology and tools make work easier in most industries. It's just a fact. So, companies should think of how digital enhancements will impact their employees and improve the employee experience.

Technological environments that impact the employee experience include technologies like hardware and software, but it also sometimes contains technologies represented as methodologies such as Agile.

Technological or digital advancements will streamline operations and make employees more efficient. Leveraging technology will also improve productivity. Employees can worry less about mundane tasks and more about important, revenue-generating duties.

Tackling the technology or digital employee experience can be done by thinking about it as a set of complementary digital experiences working together. Each requires effective software, services, and systems to improve the employee experience.

When we consider the technological environment, we break this down into three categories of digital employee experience:

- **Employee Communication Experiences** – Employees' digital experiences when interfacing with organizational communication, such as Intranets, or how they access, navigate, search, discover, and find the knowledge or content they need.
- **Employee Collaboration Experiences** – Employees' digital experiences when interfacing with teams, groups, and communities within (and without) the organization. This also includes how employees connect, network, and work together.
- **Employee Management Experiences** – The digital experiences employers, managers, leaders, and employees use to manage themselves, their teams, their groups, or their communities. This is one of the most significant areas undergoing considerable acceleration on the digital side today.

The Three Environments That Impact Every Employee Experience



In the technology environment of the organization, we've highlighted the focus areas employees leverage solutions to get their jobs done.

©Jacob Morgan (thefutureorganization.com)
Source: The Employee Experience Advantage

["The Employee Experience Advantage," Jacob Morgan](#)

As a brief example, consider how the hybrid work experience is multi-faceted with communication, collaboration, and management, all having different digital tools and ways they impact or enhance culture and the physical environment.

- The modern intelligent Intranet may be a great example of a critical communications experience for hybrid employees to get what they need to be effective remotely while feeling engaged and connected.
- Collaboration may be greater in volume, velocity, and variety and require better experiences that make meetings more effective and help with the collaboration leading up to and after the meetings.
- Lastly, employee management may require new experiences that help employees manage their work-life balance. Managers understand where they may be losing touch or organizations where they can proactively nudge and improve outcomes, all with digital tools that use our work data to inform us on how to improve.

Why are technical or digital employee experience investments potentially challenging?

These digital employee experiences often require continual intervention (more frequently than most organizations recognize), optimization over time (as they improve and the org's needs

increase), and adoption support (if we want to maximize the benefit they bring). Simply investing in, enabling, or empowering employees with these tools is necessary but insufficient. The real impact is driven by optimizing, configuring, and supporting meaningful adoption over time.

Many employees also have very different digital experiences today. This could be due to where and how they work. For example, an information worker who sits at a desk each day may interface with many applications and live a very different digital experience from a front-line worker who does most of their work on a mobile device. This means that the digital experience challenges faced by employees can vary.

While we know many employees are dissatisfied with their digital experience, we often need to better understand where and how they are dissatisfied if we hope to improve the situation. We need to approach improving the digital employee experience in a way that takes the variation of needs into account and, where possible, improve the experience to be more cohesive across both groups so that key investments benefit both role types of desks and deskless workers.

For example, when we focus on information workers or desk workers, we may emphasize simplification, integration, connection, and more to reduce the complexity and effort involved in getting their work done as they work across many apps, systems, services, and interruptions. Today many front-line or deskless workers may have a similar need that isn't being addressed (as many lack access to the same or similar digital experiences). While it may be intentional that they have different apps, systems, and services, digital employee experience strategies will often spend considerable energy determining one program of improvement actions which may have a far less beneficial impact on the other group because they haven't adequately explored or validated these workers' needs.

Physical

Historically, the office environment was where organizations had the greatest degree of control. Now, for many organizations, that has now changed as work environments no longer have to be in an office. The COVID-19 pandemic proved many companies could easily move to a remote or hybrid model and employers and employees took note.

When companies allow employees more flexibility in working, a greater experience is created. If working at an office is necessary, employers should ensure the environment is positive and allows for efficiency. Transitions into hotelling and collaborative spaces that provide an experience that complements a hybrid or remote workforce are especially important today.

Employees take note of employers who also work to improve their home working environments or physical environments. Employees have their eyes open, from ergonomic consulting to perk/purchase programs to provide employees with the hardware, furniture, or assets they need, even when working remotely.

The last primary consideration for the physical environment is how this is being transformed by the metaverse and mixed reality technologies. While this paper will not go into great depth around this subject, it is essential to acknowledge that the employee experience is being transformed already by these technologies in a very real way.

- Virtual Office Tours are not only easier to capture and render now but provide rich 2D/Flat Screen and VR immersion options that enable employees to explore and engage in physical environments from a digital footprint.
- Mixed Reality (VR & AR) is augmenting physical environment experiences and empowering entirely new ways to vet and test simulations of these environments thanks to innovations in IoT, Digital Twins, and much more.

Why Is Digital Employee Experience So Important?

We elaborated on the digital employee experience the most above because today, it is where the most significant and accessible change is made possible.

Cultural environments are as important as ever but advancing the employee experience here often requires the support of catalysts for the change, and digital and technological innovations can often provide significant support here.

Decreased emphasis on physical environments has transitioned towards greater emphasis on digital environments. Further accelerated over time by mixed reality, better physical and digitally integrated meeting experiences, and potentially by the metaverse.

Moreover, the technology marketplace has tremendously accelerated offerings and capabilities in this space over the past few years.

A great employee experience in a digital environment is empowering. Employees with positive experiences are more likely to stay loyal to a company. When an organization uses a remote or hybrid work model, an effective digital employee experience platform is a must if you expect engaged employees.

Remote work can leave employees feeling disconnected if not done correctly. Businesses can mitigate this with a digital workplace focused on culture and collaboration.

Employees want meaningful work with a purpose. And the impact of employee experience can make or break an organization. Those with bad experiences have higher turnover and less productivity.

Benefits Of A Good Employee Experience

A great employee experience benefits not only workers but also the organization. Engaged and satisfied employees are more productive and happier to be at work.

Key benefits include:

- Increased performance
- Higher engagement
- Lower absentee rates
- Greater employee satisfaction
- Higher quality work

You can learn more about each of these benefits below.



Increased Performance

Satisfied and happy employees tend to be more productive. And higher productivity leads to better performance. Employees are a key aspect of a successful organization, so creating a positive experience for them is vital.

Companies that score in the top 25% on employee experience report a **2x return on sales and nearly a 3x return on assets** – [IBM's Smarter Workforce Institute](#)

Higher Engagement

Employees with the systems and tools to make their jobs easier will have higher engagement ratings. When employees are engaged, performance will increase and improve.

Disengaged employees can cost companies **between \$450 and \$550 billion dollars a year** – [Gallup](#)

Lower Absentee Rates

Absenteeism rates are higher when an employee really dislikes a work environment or culture. Companies can mitigate this problem by focusing the entire culture on a great employee experience.

EX leaders have 4x higher average profits, 2x higher average revenues, **40% lower turnover** and 24% smaller headcount – [Jacob Morgan](#)

Greater Employee Satisfaction

Engaged and happy employees are satisfied. Satisfaction increases when workers don't have to struggle to do their jobs due to ineffective systems. And when the culture focuses on them as individuals, satisfaction increases.

Employees who are satisfied with their organization's flexibility are **2.6x more likely to be happy working for their employer** and are 2.1x more likely to recommend working for their employer. – [Glint](#)

Higher Quality Work

When you add all of this together, you get higher-quality work. When employees are happy with their jobs, the quality of their work increases alongside their happiness.

EX leaders beat out the average S&P by 122% – [Accenture](#)

How To Measure the Success of Employee Experience Initiatives

Employers should consider a few different aspects of an employee's experience. To get a clear picture, companies have to look at all activities. When assessing the success of a business's initiatives, consider the following:

- Wellbeing
- Connection
- Focus
- Empowerment
- Growth opportunities
- Purpose

Are employees impacted positively in all these areas? Do they understand their purpose within the organization? That's the first step to driving success across the other areas.



Basic Trends for A Positive Employee Experience

Leaders should have a strong strategy and employee experience management practices. There are several ways to [strengthen employee experience](#) across an organization. Those include:

- Being empathetic
- Flexible working options
- Employee feedback
- Better culture
- More learning opportunities
- Offer a sense of belonging

Discover the impact on employee experience for each of these components below.

Being Empathetic

A little empathy can go a long way with employees. Consider the employee experience from an employee's perspective. A lot of employees leave organizations due to management teams without empathy.

So, be authentic. Think of employees as human beings with lives outside of work. And add a personal touch when communicating with workers.

Flexible Working Options

As discussed above, workers want flexibility. If possible, add this to your working model. Remote options make employees happier and more productive.

Employee Feedback

Before deciding on how to improve the employee experience, ask employees what they'd like to see changed. Going straight to the source before making changes will save time and money. And experiences will improve because you'll be resolving specific concerns.

Better Culture

Also discussed above, a better culture focused on valuing employees is an important step. Small changes to the company culture can go a long way in improving employee experiences.

More Learning Opportunities

Employees want to grow and advance in their careers. Offering more learning opportunities enables employees to strengthen their skills. This leads to a better experience.

Allow management teams to discuss career paths and give employees the time and resources needed to meet their goals is a must.

A Sense of Belonging

Employees want to understand their purpose in the organization. And feel like they belong. Creating a culture focused on value and collaboration will help employees feel a sense of belonging.

How much should you spend on enhancing the employee experience today?

You can start with industry baselines and insights, but we recommend investing more than this baseline, especially in today's competitive employee marketplace.

According to Gartner, in 2019, companies spent an average of \$2,420 per person on efforts to enhance the employee experience, and this number has continued to grow. Some analysts believe it may have doubled. We can use industry baselines like these as a starting point but assessing how much you spend today is the first step to establishing your benchmark that can be used to evaluate the benefits it might be providing.

It is important to note in multiple surveys, studies, and extensive research we have done with our partners and customers, most employees feel not enough investment is spent on employee experience. So, it is safe to say that more investment than whatever your current baseline is will almost certainly be encouraged.

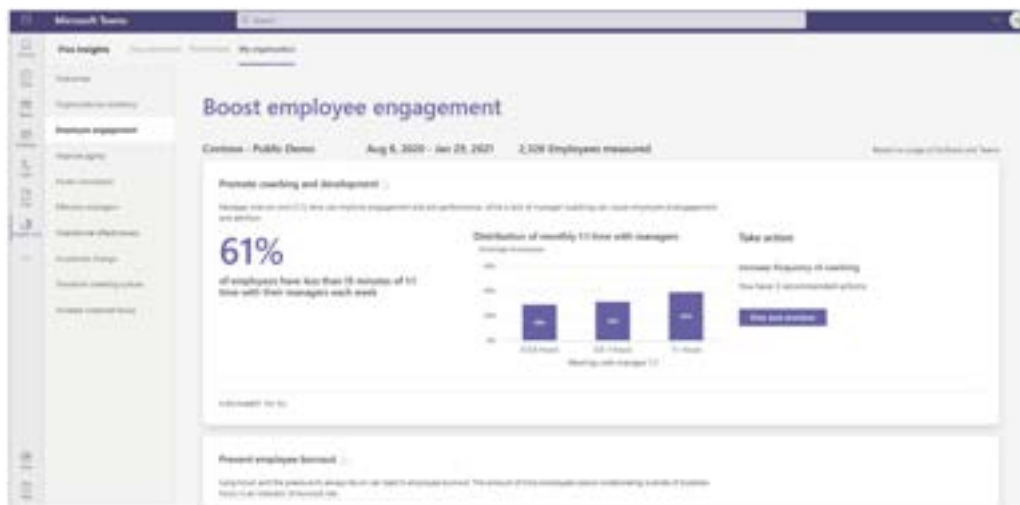
Why do Microsoft 365 & Microsoft Viva Matter?

Microsoft 365 offers a [suite of tools](#) and capabilities for all of the employee experience touchpoints. Here are some of the reasons why we recommend maximizing Microsoft 365 to build a positive employee experience at your organization:

- Boost Employee Engagement
- Build For Hybrid & Mobile Work
- Enable Greater AI & Automation
- Improve Wellbeing & Retention
- Remain Secure & Compliant
- Provide More Consistency

Reason #1: Boost Employee Engagement

Every organization wishes to maximize its employees. Employees with high job satisfaction and a strong sense of belonging are more likely to produce high-quality work, identify business opportunities, and remain at the organization. The most successful organizations have learned that to maximize employees, we need to ensure we are helping them effectively be engaged in their work, workforce, workplace, and vision.



Microsoft 365 and Microsoft Viva provide rich experiences that offer significant opportunities to increase employee engagement, better understand and monitor it, and action or mitigate potential communication, collaboration, management, social, or organizational disconnects that lead to decreased employee engagement.

A recent poll from the Harvard Business Review found:

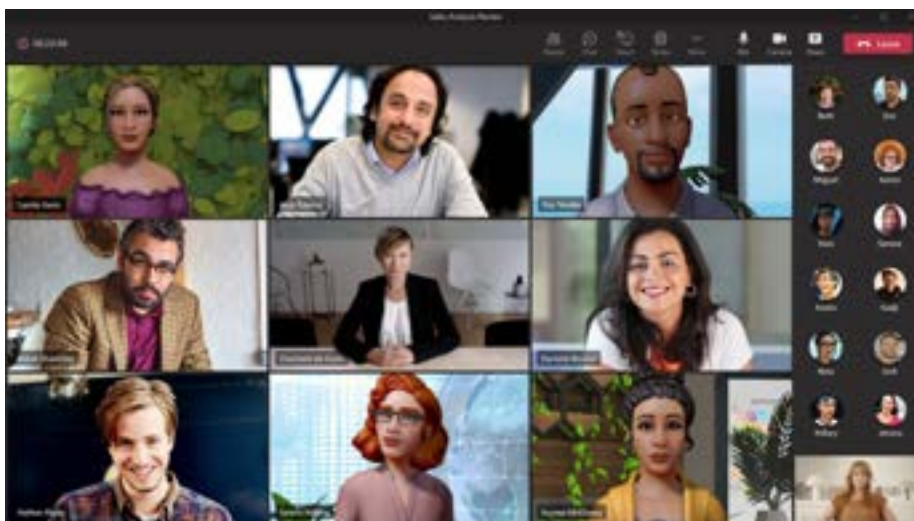


Reason #2: Built For Hybrid & Mobile Work

Microsoft 365 enables companies to create a digital workplace. Its suite of applications allows teams to communicate and collaborate from anywhere. It gives companies the ability to modernize the employee experience.

Having mobility within your employee experience is a must. The COVID-19 pandemic proved that many companies must be ready to work from anywhere and that employees may prefer hybrid or fully remote arrangements. Likewise, employees may be at their most productive in a mobile or remote arrangement. Depending on the nature of the business, a mobile or remote work environment can also provide significant cost savings to the organization.

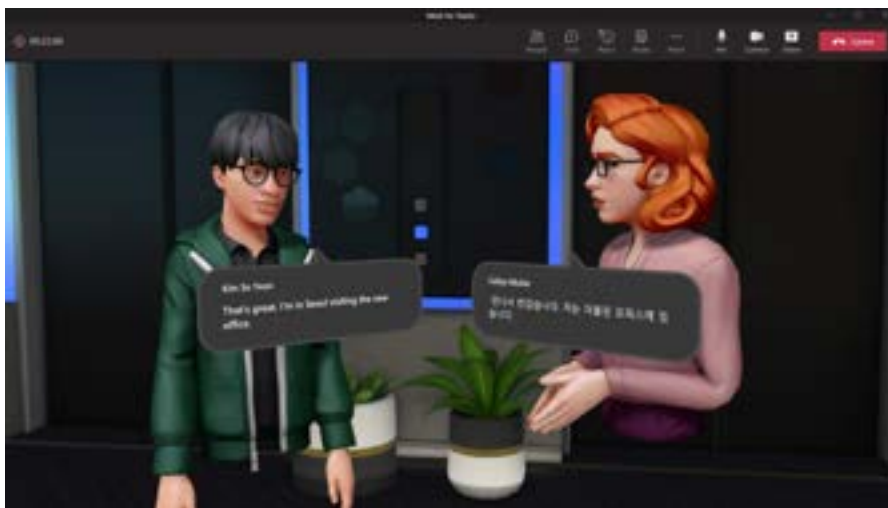
Microsoft 365 and Microsoft Viva are built from the ground up for mobile and remote ready. Each app and solution that improves the employee experience has targeted designed experiences for the more rapid and frequent interaction experiences we have on mobile.



These technologies are also hybrid first. Organizations can take advantage of legacy, server, or hardware investments while embracing the full capabilities, connections, and integrations with hundreds of popular services out-of-the-box. This is the most connected enterprise technology platform in the world today.



If that wasn't enough Microsoft has made significant investments in mixed reality and the metaverse and is even now bringing that capability to Microsoft Teams providing entirely new ways for employees to work remotely and virtually.



Reason #3: Enable Greater AI & Automation

Automated tasks lead to higher efficiency and productivity of team members, and automation should always be a cornerstone of a compelling employee experience. Artificial Intelligence (AI) technology is rapidly changing today's workforce, creating new skill needs and displacing

others. At the same time, AI-empowered experiences support your employees in various ways. AI and automation today may be affecting your employee experience by:

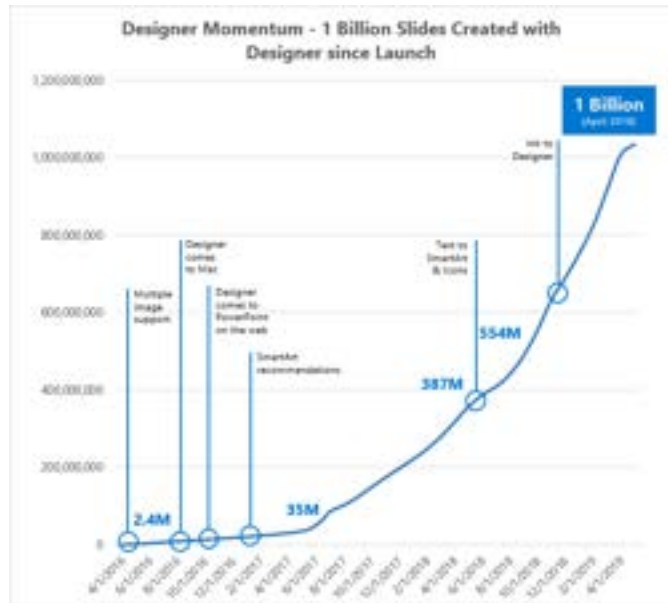
- Providing predictive routing and engagement to match interactions and business needs with the ideal employees where and when they can most effectively succeed.
- Insights into work habits and behaviors provide contextualized and targeted guidance that empowers employees, managers, processes, and organizational improvements.

The Microsoft 365 platform and Microsoft Viva take advantage of the extensive Microsoft Graph, the world's largest and most robust collection of digital signals for employee work. Hundreds of millions of interactions—aggregated, anonymous signals from Microsoft users—are training machine learning models to provide better and better results over time.

AI services, solutions, and enhancements are interwoven throughout the experiences where and when it makes sense while still empowering organizations to leverage this data, connect to the graph, or further integrate with it to enrich additional AI improvements into the Employee Experience.

What are some brief examples of AI at work in Microsoft 365 today, working in the background to improve the employee experience?

- Improved Content & Messaging:
 - Using Microsoft Teams, employees can communicate with colleagues who speak different languages by providing a real-time translation of chat messages, subtitles, or transcription in meetings.
 - In PowerPoint, Ideas automates the creation of slides and presentations with a cloud-powered recommendation engine. Anyone can create polished slides and stunning motion effects with just a few quick steps. Employees can spend less time figuring out how to produce high-quality designs and more time preparing for their presentations. More than 1 billion slides have already been designed with Design Ideas in PowerPoint.



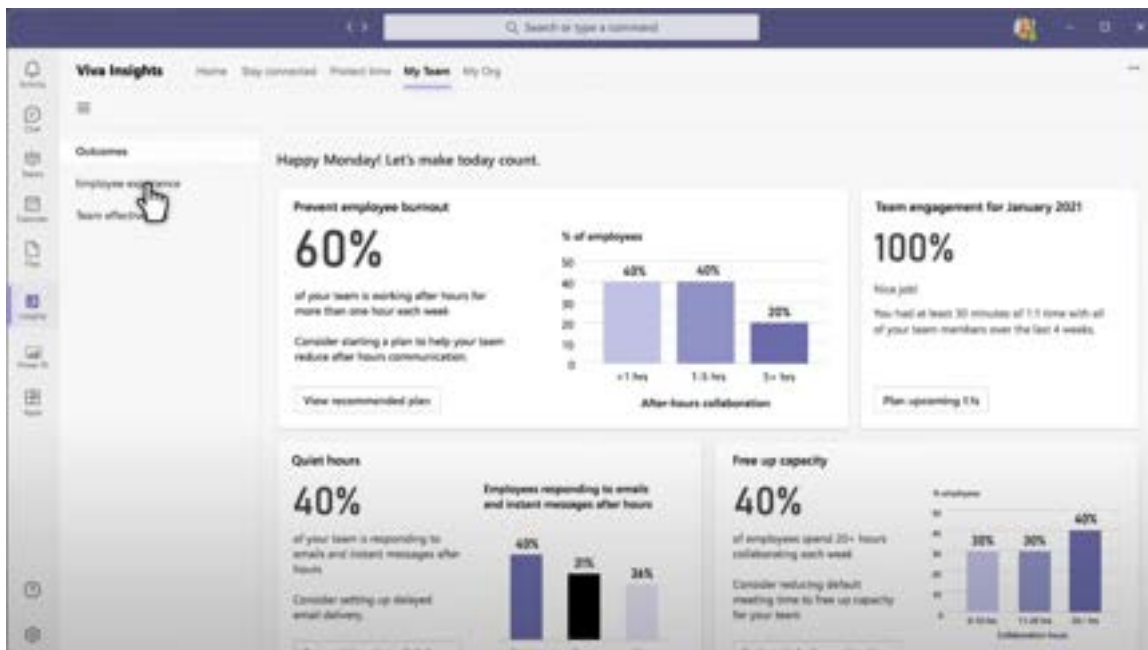
- AI capabilities in Outlook amplify employee skills such as the focused inbox that helps filter out the noise, suggested replies that speed up responses when all you need is a short message, and intelligent technology that helps employees find the best room for a meeting based on attendees, time, availability and their preferences.
- Viva Insights:
 - Identifies how employees across an organization spend their time and provide insights into how groups collaborate. Dashboards highlight potential problem areas, while custom queries offer flexible data access to create valuable insights. By quantifying Microsoft 365 collaboration data, Viva Insights gives business decision-makers a powerful tool for evidence-based cultural transformation.
- Microsoft Search:
 - Learns from past actions to provide results spanning apps, files, settings, and people in the context of an individual's current work. With the power of zero-entry queries, employees often won't even have to begin typing; Microsoft 365 will present the desired result based on recent activities. And search isn't just for text anymore. Microsoft 365 can determine where photos were taken, recognize objects, extract text in photos, and search audio and video files. This object recognition and text extraction help make searching for images as easy as searching for documents. It can also enable facial recognition to jump to a point in a video where a specific person is speaking, or a specific name is mentioned.

Microsoft 365 and Microsoft Viva also have many options for automation, including many integrated ones out of the box and extensive opportunities with SharePoint Syntex, the Microsoft Power Platform, Microsoft Azure, and hundreds of vendor solutions. Microsoft 365 also provides comprehensive insights into teams, their operations, and their usage of these automation tools. The insights can be used to improve processes. It can even be used to create personalized improvement plans for employees.

Reason #4: Improve Wellbeing & Retention

The concept of employee wellness and wellness at work is changing and evolving to suit the needs of our modern workforce better and keep employees happy and healthy. The employee experience is vital to enable employees to produce their best work and feel good about their work and themselves. Everyone deserves and wants to feel important and supported at their jobs; this is a principal aspect to consider when dealing with talent attrition.

Microsoft's capabilities also allow for employee wellbeing monitoring. The platform uses artificial intelligence to recommend better working methods, suggested time off, and more efficient calendar scheduling. It also submits personalized content to increase skills and knowledge. For example, the platform integrates with Headspace to provide a mindfulness experience for employees. Employees can take breathing breaks, guided meditation sessions, listen to focus music, or learn about productivity hacks that could improve their day.



Speaking of wellbeing, watch our CTO (Chief Technology Officer) and Microsoft MVP, Richard Harbridge, provide an overview of a recent Employee Wellbeing Report [in this linked video](#).

Reason #5: Remain Secure & Compliant

Employees want to know their information is safe and secure. Microsoft applications use world-class cybersecurity processes to help make this happen. Still, even then, when the employee experience isn't well supported, they can encounter frustrating security challenges, often due to a beleaguered IT workforce struggling to keep up with security demands. With growing governance, enforcement, and expectations, compliance has never been more important or complex. Unfortunately, most employees are overwhelmed by security and compliance requirements and underwhelmed by their organization's proactive planning, design, optimization, and support efforts to empower responsible work.

The Microsoft 365 and Microsoft Viva platform allow companies to consolidate information on one platform to make security seamless. Tools such as multi-factor authentication, automated information protection, and a fully integrated permissions experience make security easier for IT and more frictionless for the employee. Enabling an improved employee experience responsibly today requires the effective use of these key capabilities Microsoft and its connected ecosystem provide.

The breadth of Microsoft 365's security services and their intelligent security graph has led to Microsoft seeing more than five billion threats per month. Microsoft sees over 400 billion emails get analyzed by the Outlook.com and Office 365 email services every month, over 1.2 billion devices get scanned by Windows Defender, and over 450 billion monthly authentications occur on Azure Active Directory and Microsoft Accounts. This direct experience provides information from defending from these attacks to help protect your employee experience by providing customized, dynamic lists of clear, actionable recommendations in security and compliance.

Reason #5: Provide More Consistency


Consistent processes and operations significantly improve productivity among teams. Using Microsoft 365 allows for [consistency across the organization](#), as all employees use the same apps for content management, collaboration, messaging, and team engagement. These services and apps are further enriched with Microsoft Viva experiences that integrate more

systems, new ways of working, and entirely new employee experiences in a familiar and connected way.

With streamlined and consistent work applications, most companies save significantly on costs as well, as there is only one set of licenses to manage.

Why does Microsoft Copilot matter?

The evolution of the digital workspace necessitates innovative solutions to enhance productivity, personalize learning, and empower employees to become more self-sufficient. Microsoft Copilot, an AI-powered virtual assistant integrated within the Microsoft 365 and Microsoft Viva platform, is a pioneering tool designed to fulfill these requirements.

A dark blue rectangular graphic with white text. The text is a quote about AI's role in employee experience. In the bottom right corner, there are two logos: "reworked CONNECT" and "CHSWIRE CONNECT".

AI enables entirely new ways to scale and support employee experience, but, at the core, the **intent around AI communication, collaboration and management is the same.**

In the following section, we will delve into the primary use cases of Microsoft Copilot that make it a game-changer in the modern workspace environment: its ability to provide contextual guidance, deliver personalized learning experiences, and reduce employees' dependence on organization understanding or IT support. These features streamline work processes and foster a more efficient, engaging, and independent work culture. Through an in-depth exploration of these use cases, we will uncover how Microsoft Copilot is reshaping the employee experience in the digital age.

When we look at Microsoft Copilot, we must recognize that it and AI affect each digital experience, whether communication, collaboration, or management experiences today.

Employee Communication Experiences

Let's start with the Employee Communication experiences and use cases that benefit from AI. We have identified eight use cases where AI is improving Employee Communication.

- Accelerate and Optimize Communication
- Summarization
- Research Assistant
- Intelligent Recap
- Tone Awareness and Messaging Style
- Writing Support
- Writing Suggestions

Employee Communication Is Benefiting From AI

Whether you use GPT or other industry tools, or whether you embrace copilot soon; the reality is that these tools can have an immediate and notable impact and are in use by many organizations today.

- Accelerate & Optimize Communication
- Summarization
- Research Assistant
- Intelligent Recaps
- Tone Awareness & Messaging Style
- Writing Support
- Writing Suggestions

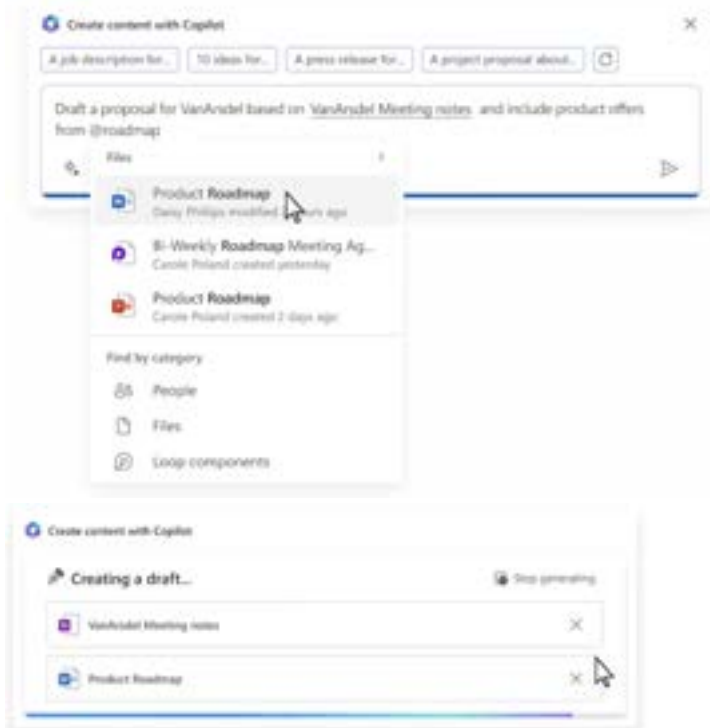


Accelerate and Optimize Communication with AI

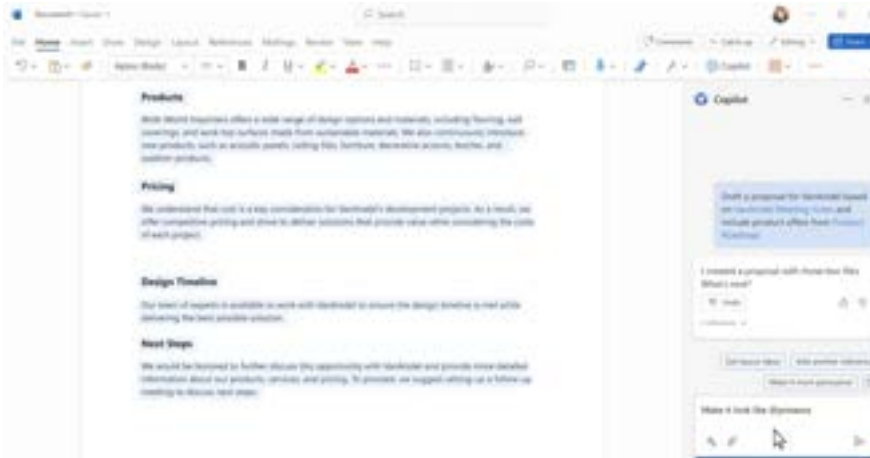
Microsoft Copilot excels in accelerating and optimizing communication within organizations. It accomplishes this by utilizing its state-of-the-art Natural Language Processing (NLP) capabilities to interpret and respond to queries or commands conversationally. This feature allows users to interact with data and systems more naturally and intuitively, significantly reducing task time. In addition, it encourages clearer communication by providing real-time suggestions to improve clarity and coherence. This way, Microsoft Copilot fosters an environment where communication is not a hurdle but a conduit for productivity and collaboration.

For example, AI can draft communication and documents using input from multiple sources. By sharing a command like "Draft a proposal for CustomerX based on yesterday's notes," AI will automatically suggest sources for the OneNote from yesterday. The user could select that

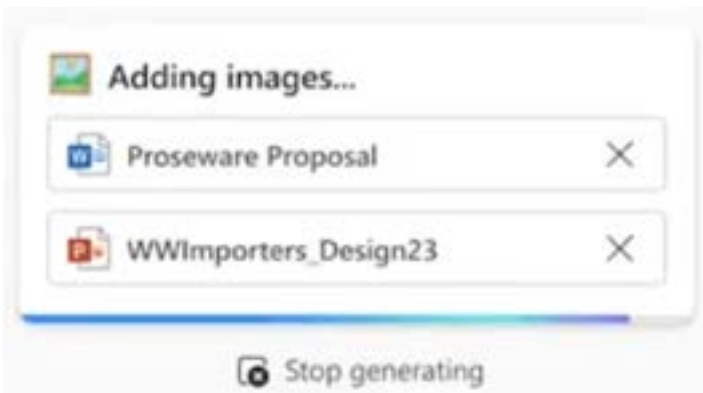
OneNote source and continue writing "and include product offers from @Roadmap," which would then surface likely files based on a contextual search enabling them to select a Word document based on a Product Roadmap. At this point, if they executed that initial command, Copilot would create a Word document for them that combines input from the meeting notes with content from the product roadmap in a proposal format.



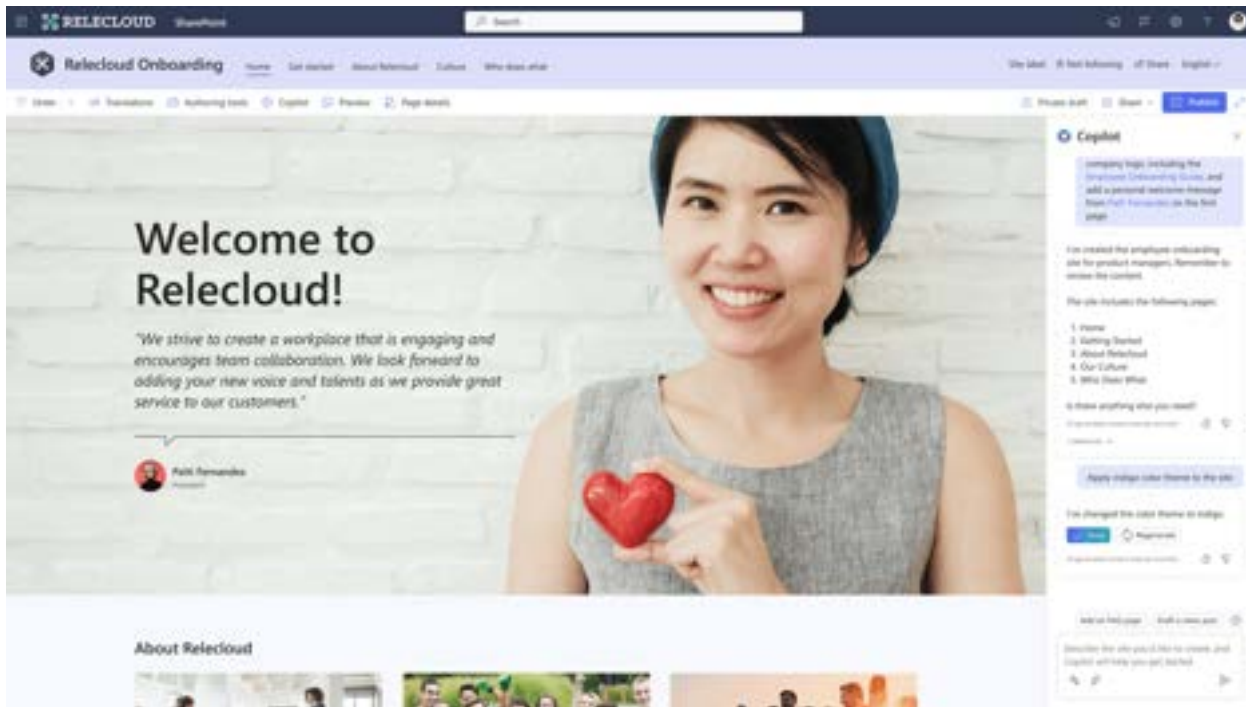
This saves considerable time initially, but it's not just the initial creation where Copilot and AI drive acceleration or optimization, but even in the continued refinement and editing experience.



The user might then continue the process by telling Copilot, "Make it look like @prosewa" which triggers a natural contextual search and allows them to select a recent proposal they formatted. They could continue the natural discussion with AI by adding "and pull images from @design" and selecting a recently modified Design document about the product. Copilot will update the document formatting, style, and more while adding images contextually based on what is available in that product-related PowerPoint presentation.



This works similarly for other content, not just Word, including PowerPoint, Excel, Power BI, and even SharePoint Intranet pages. That doesn't even include how authors can use AI to engage in psychographic profile-based discussion about the content they created to further refine and improve it or how they can create content related to existing content to connect, amplify or improve engagement with it.

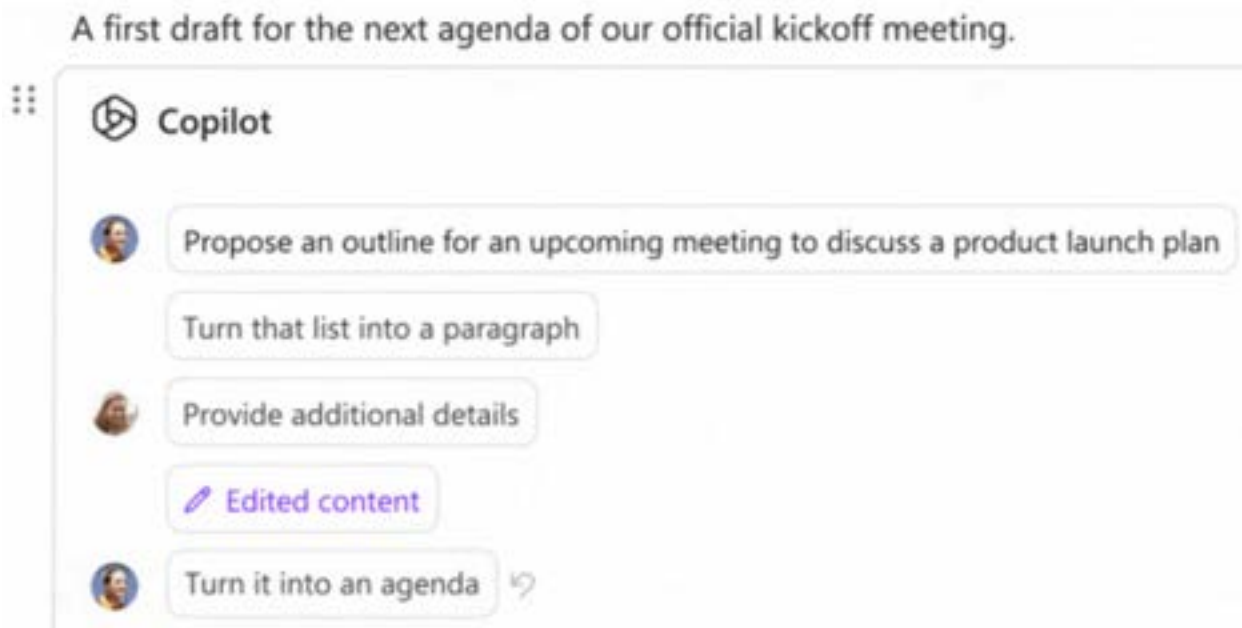


In the image above, we see an example where based on simple input of a PowerPoint and a reference to an individual, we have an entire Intranet site created with the support of AI.

Accelerate and Optimize Collaboration with AI

When individuals collaborate, we know it leads to better results in almost every business task. There is a saying that $1+1=3$ when it comes to collaboration because the sum is greater than the whole of the parts, which means that what people can accomplish together is more significant than what they can ever do individually. When you introduce Microsoft Copilot it acts as an AI copilot to each individual, so when two individuals collaborate and both have access to Microsoft Copilot, you don't just see the benefit from one, but an exponential benefit from each individual as they each use AI in different ways during the collaboration process.

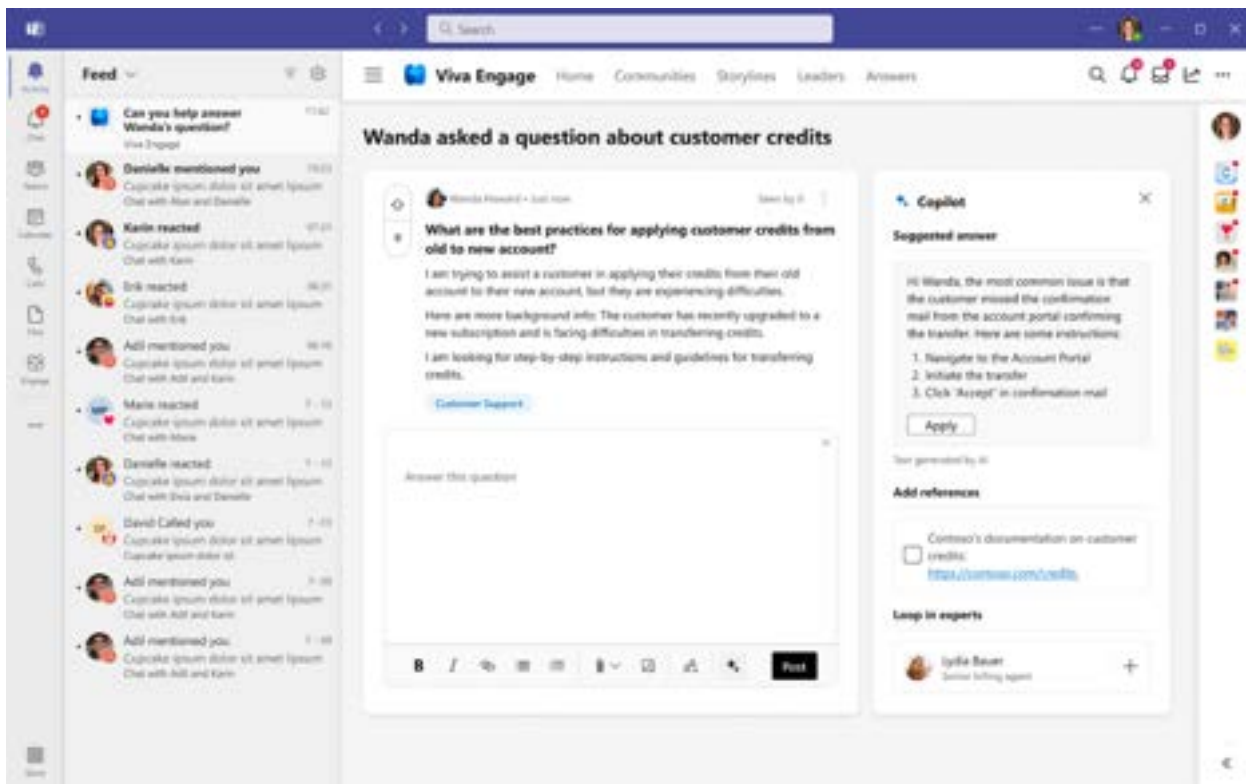
In the simple image below, see how each individual uses Copilot to accelerate the work involved in establishing an agenda for an upcoming meeting.



In this way, instead of $1+1=3$ as our formula for collaboration outcomes, we should look at it as $1 \times \text{AI} + 1 \times \text{AI} = \text{Exponentially more impact than before.}$

Unfortunately, collaboration comes with some costs. Not only are there costs because each individual collaborating must take the time to collaborate, but often there is a premium on work that has to be split across people with communication overhead, miscommunication, and more. An advantage of AI accelerated collaboration is that AI is an active participant in the collaboration experience and often provides the skills, knowledge, and support we would have had to leverage another person's time for. This often leads to significant cost benefits in collaboration outcomes when AI is leveraged. Some estimates today show not only 2x but 3x or 4x the cost benefit when an individual collaborates with AI versus one who does not.

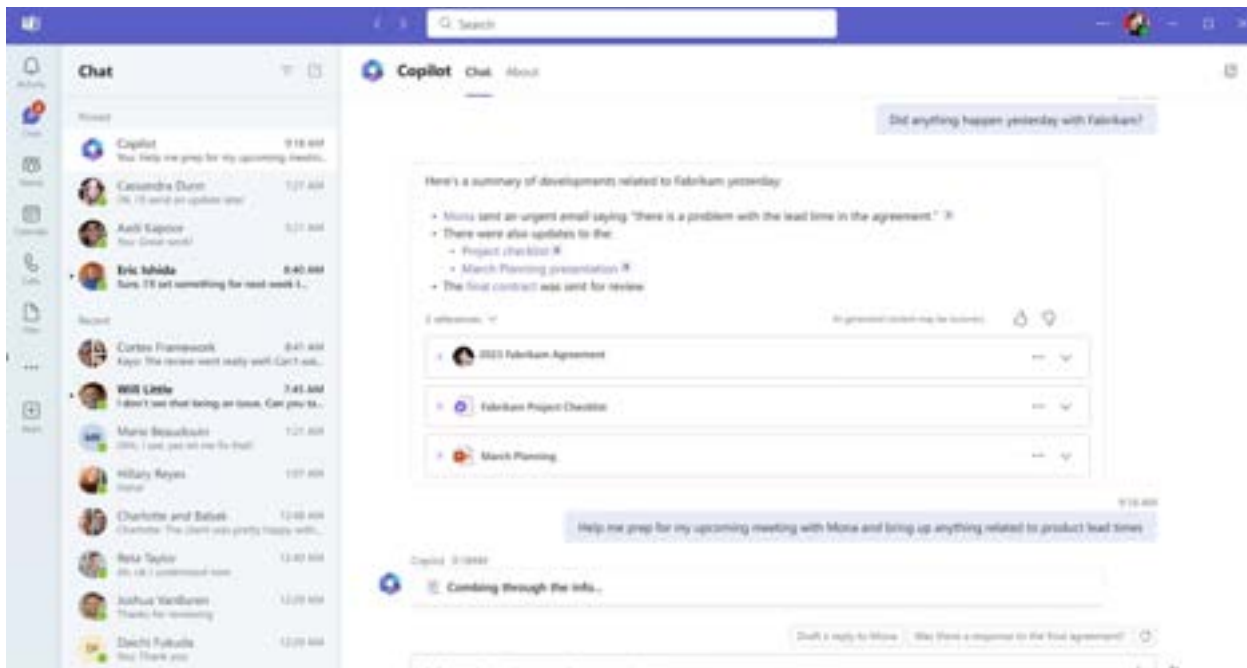
This can also be a boon when we consider how collaboration often occurs. Determining who to collaborate with, who to share and ask questions to can be a challenge. But by leveraging AI, we can evaluate potential topic experts. Then, suppose those experts are confirmed either through the Viva Topics experiences or other methods. In that case, we can have questions suggested to them based on their interests and proven expertise in topics. In this way, the image below doesn't just show an example where AI suggested but where AI helps in the collaboration process by providing a potential answer, related resources, and additional experts/individuals.



Accelerate and Optimize Management with AI

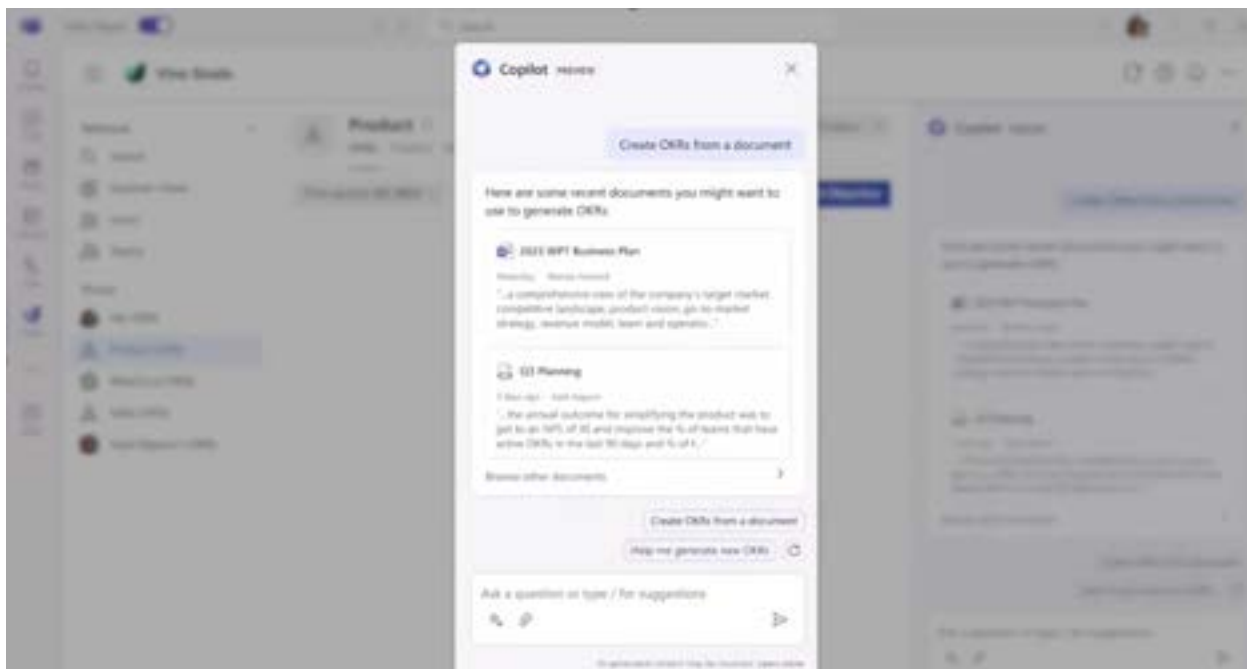
AI can provide skills not just to skills in apps or technology but also in other fields and areas of expertise. The data it was trained on includes massive information on business best practices, management theory, psychology, and more.

We always recommend thinking about management as it relates to technology first, from managing yourself as an employee or leader, then managing your team, and finally managing your group or organization. When it comes to Microsoft Copilot, it can provide intelligent benefits at each level. For example, using the image below, we can ask a simple question about what happened yesterday with a customer Fabrikam. Remember that this question could have been asked about your team, a department, or more enabling employees, managers, and leaders to be empowered with more insight than ever before, helping them drive decisions based on data instead of dogma.

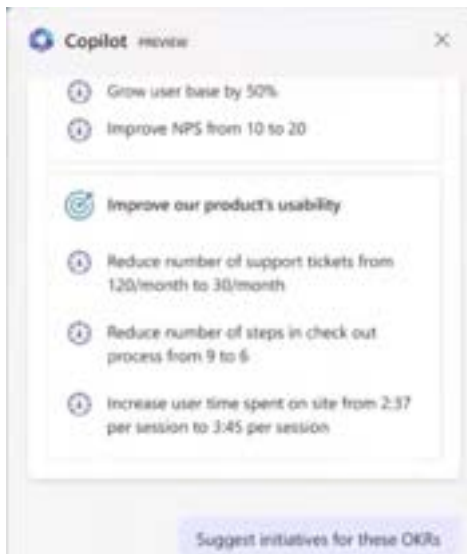


When combined with other Microsoft Viva technologies like Viva Insights, Viva GLINT, Viva Pulse, Viva Engage, and Viva Goals, it can provide even more value.

In the example below, we can use AI via Microsoft Copilot to create OKRs from an existing set of meeting notes or business plan documents and then work with it to refine the objectives and key results to make them more specific, measurable, relevant, time-bound, and more.



This helps with the initial acceleration of creating better alignment, visibility, and prioritization via Viva Goals and working on making it more actionable and understandable to all involved.



Use AI for Summarization and Simplification of Communication

In the information-laden business world, quickly summarizing and condensing information is paramount. Microsoft Copilot's summarization feature comes into play here, processing large volumes of data and presenting essential information concisely.

It can analyze documents, emails, and other written content, drawing out key points and summarizing them effectively. This functionality aids employees in digesting information more quickly and making informed decisions without spending excessive time on data processing.

For example, consider how it can help create too long didn't read or TLDR; news summaries and how that can work not just for one news page but across multiple news pages based on a theme or what was released this past week. Summarization can also be about making content more accessible. Consider how using things like ELI5 or explaining like I am 5 might improve the accessibility of dense engineering material or scientific content in existing Intranets and organizations today.

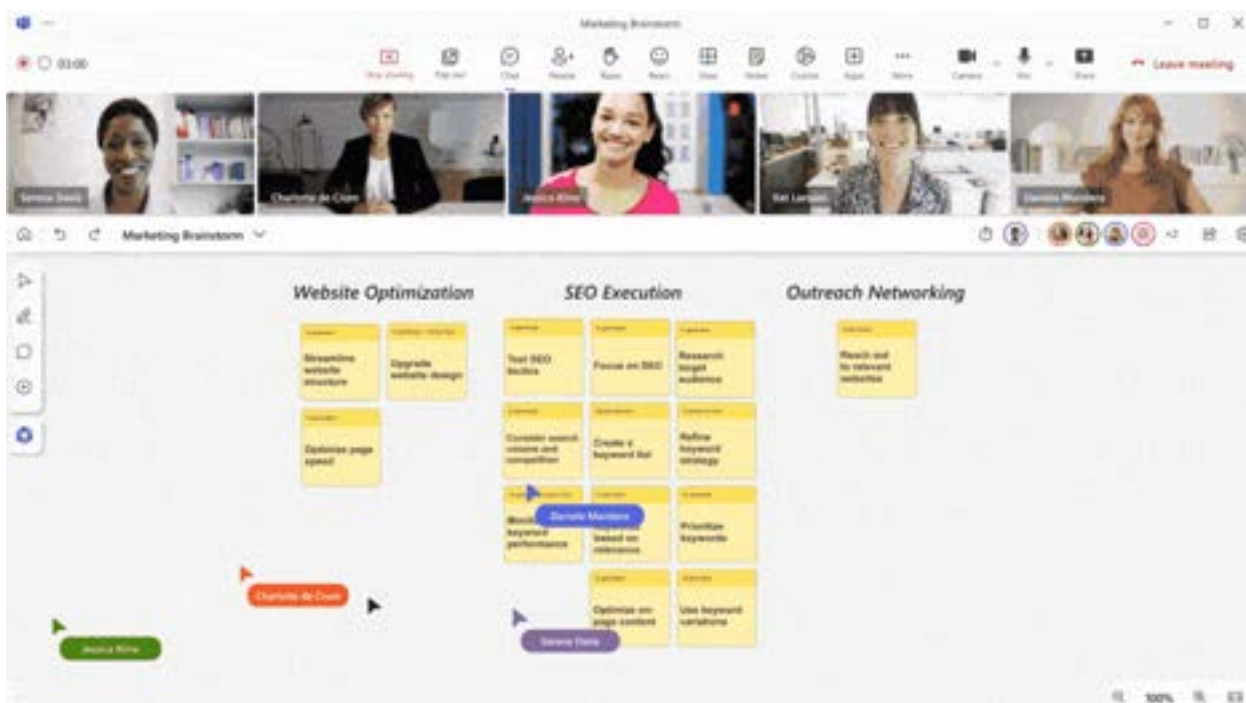
You can even use this not just for new content but to improve the accessibility or connectedness of older content as well. For example, when working with customers, we often enhance the Microsoft 365 Intranet experience and have implemented summarization capabilities to the top of pages via a custom header control. This way, older pages can have

summaries like the one visualized below based on this [great community example](#) to bring AI to older pages and content and improve it in new ways.



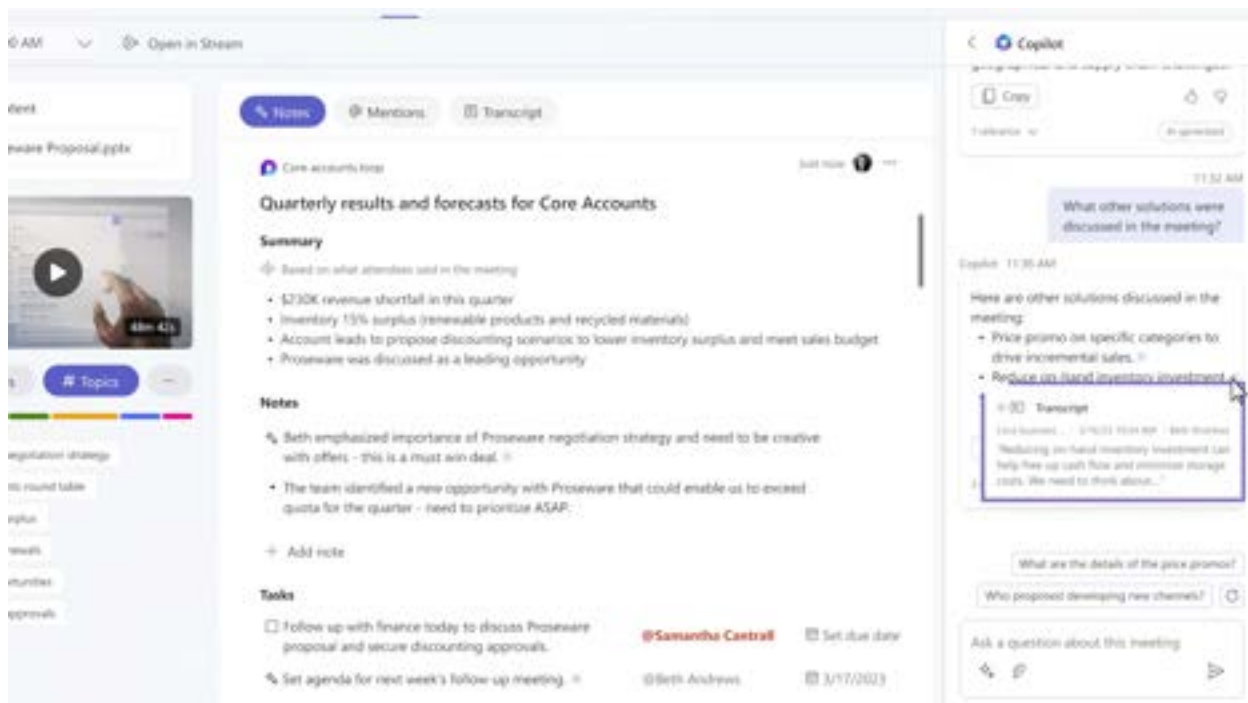
Use AI to Provide Research Assistance

Microsoft Copilot is an invaluable research assistant, simplifying the often time-consuming information-gathering process. By leveraging its advanced machine learning capabilities, Copilot can perform comprehensive research on a broad range of topics, retrieve relevant data, and present it in an organized manner. This feature empowers employees to focus on higher-order tasks, reducing the burden of information retrieval and promoting a more efficient workflow.



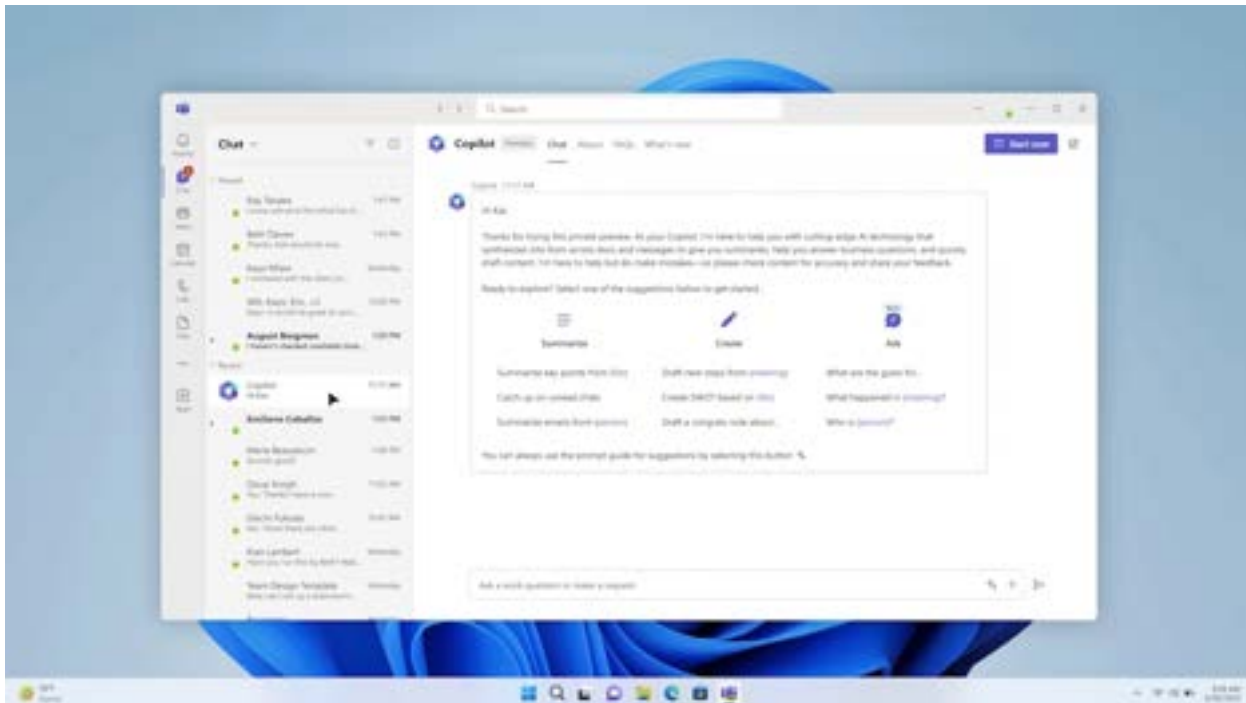
The whiteboard is summarized after an interactive brainstorming session for continued discussion and uses in this simple example above.

One of the advantages of the system and the way AI is integrated into the flow of our work in Microsoft 365 and Microsoft Viva is that it works to show the source of AI-generated content. In this way, when AI suggests action items for a meeting, it doesn't just share the potential action item but allows the 'Pilot' or employee to validate or verify that the AI system made the right decision. This is critical because trust but verify remains at the forefront of the employee decision-making process.

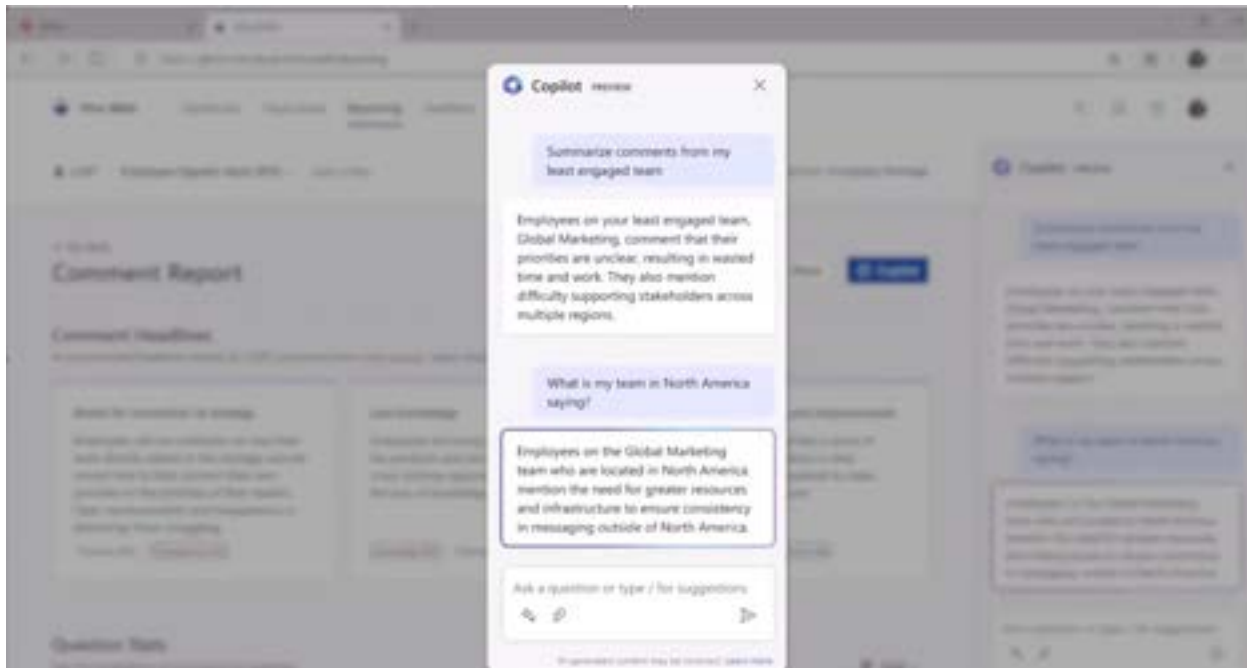


In the image above, it's important to note that not only is it identifying action items summarized from the meeting transcript, but it is keeping the connection to where it discovered and identified the action item providing much-needed context.

Another key to its ability to act as an amazing assistant is that the content indexed in Microsoft 365 is done via a Semantic Index. The Semantic Index for Copilot is a sophisticated map of your user and company data. For example, when you ask about the "March Sales Report," it doesn't simply look for documents with those words in the file name or body. Instead, it understands that "sales reports are produced by Kelly on the finance team and created in Excel." And it uses that conceptual understanding to determine your intent and help you find what you need.



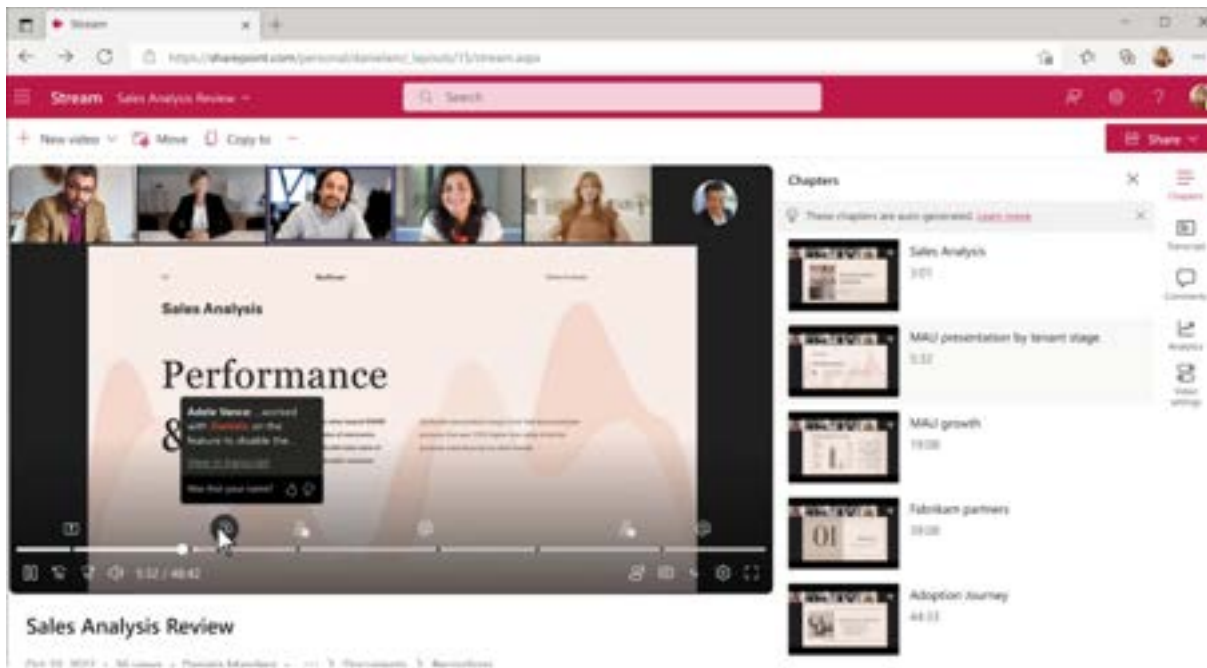
This is taken even further when considering AI's scale and how fast it can analyze data. For example, most large organizations might run employee engagement surveys with a great tool like Microsoft Viva GLINT. You might get thousands of comments or direct feedback signals in response when you run these surveys. Usually, this might take weeks to rationalize and explore manually. Still, with AI assistance, we can ask questions about the comments right away and, more importantly, respond to questions from managers as we work out actionable plans to improve outcomes with managers and leaders in the organization.



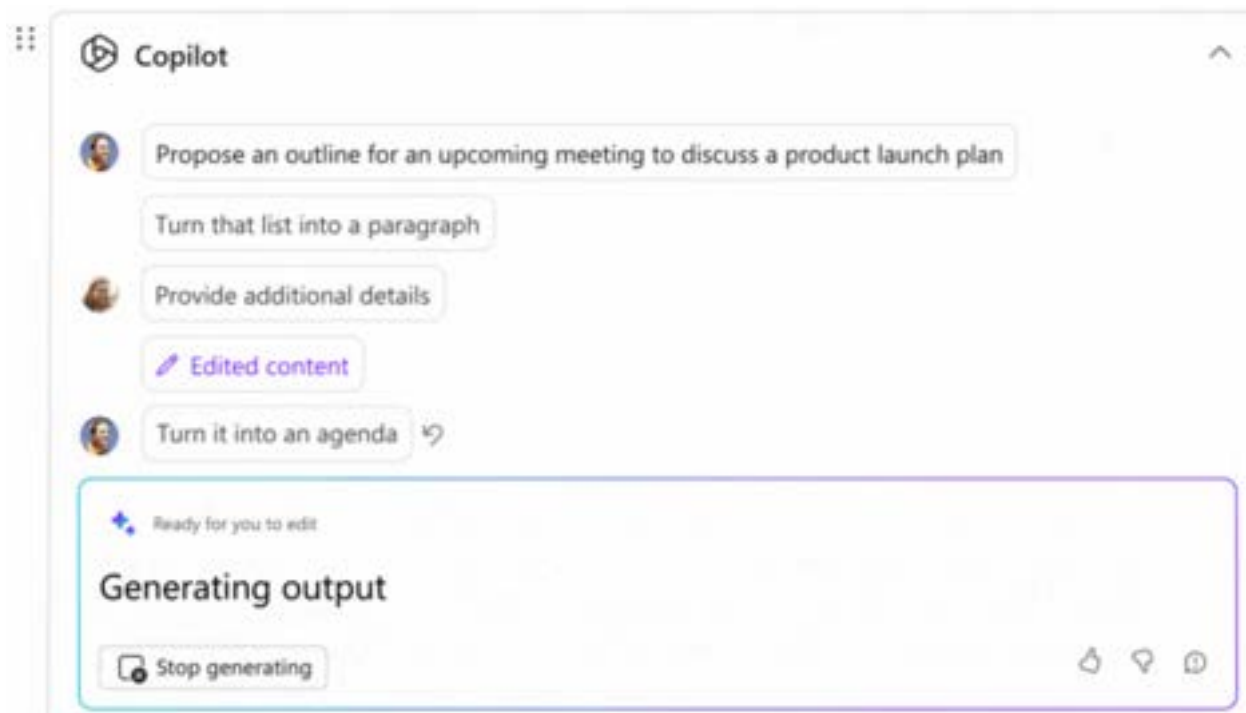
Use AI to Provide Intelligent Recaps

One of the standout features of Microsoft Copilot is its intelligent recap capability. This feature is designed to keep track of the progress of various tasks and discussions, providing a concise recap when necessary. It automatically generates summaries of meetings, tasks, or projects, ensuring all team members are updated with the latest information. This results in greater alignment within the team, reducing the possibility of miscommunication and enhancing overall execution.

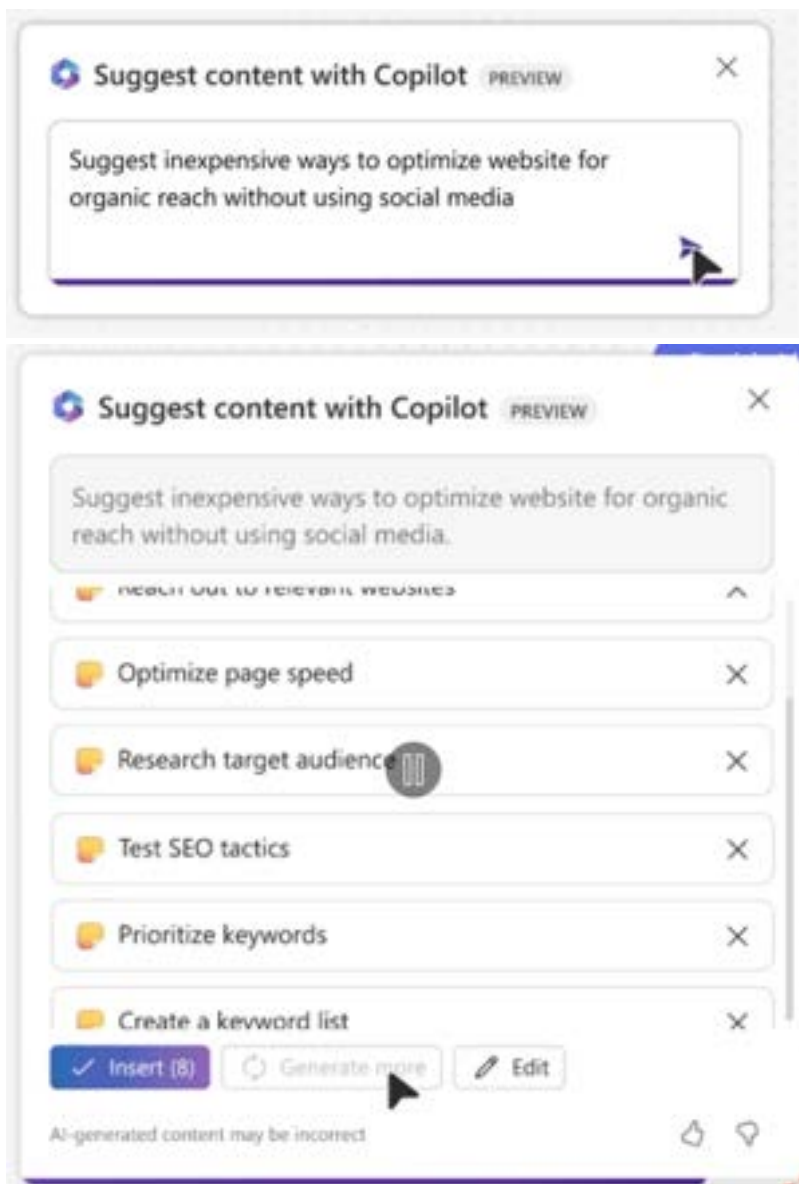
The most immediate example most people think of is how it can affect the post-meeting experience. Enabling quick visibility of autogenerated chapters that help us streamline our review, show us when we joined the meeting, exited it, or were mentioned in the meeting, and more.



The reality is that this also affects the in-meeting experience as well as the pre-meeting experience. Before the meeting, you might use it to create a compelling agenda by collaborating with your peers, with each of you using AI and Copilot creatively.

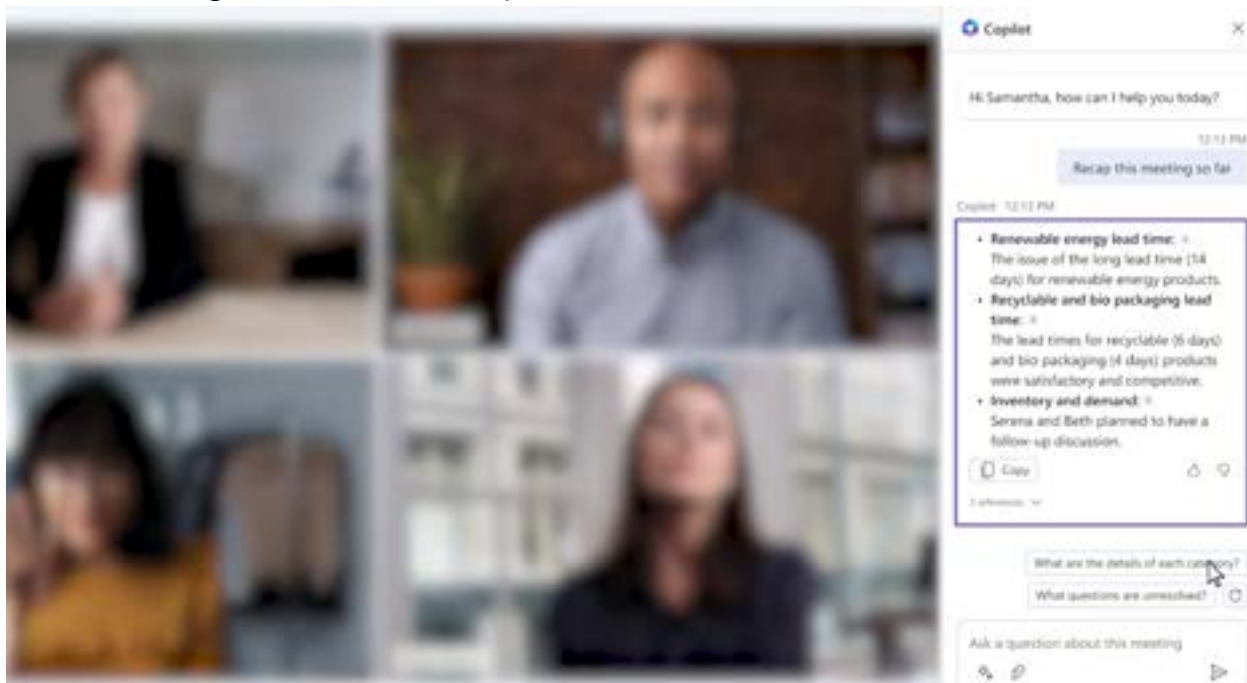


Or you might use it to suggest ideas for a brainstorming session on optimizing the website without using social media.

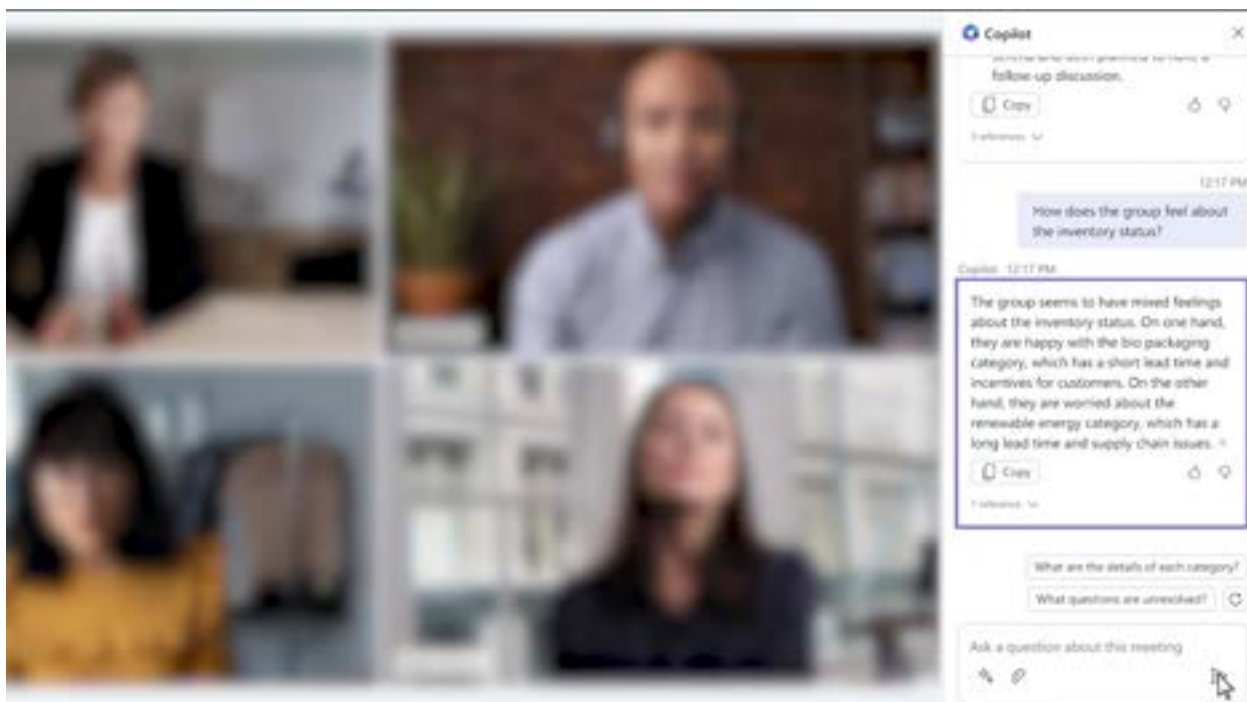


During a meeting, it can also drive considerable value by enabling more meetings to start on time because anyone can join and immediately get a private recap of the meeting so far

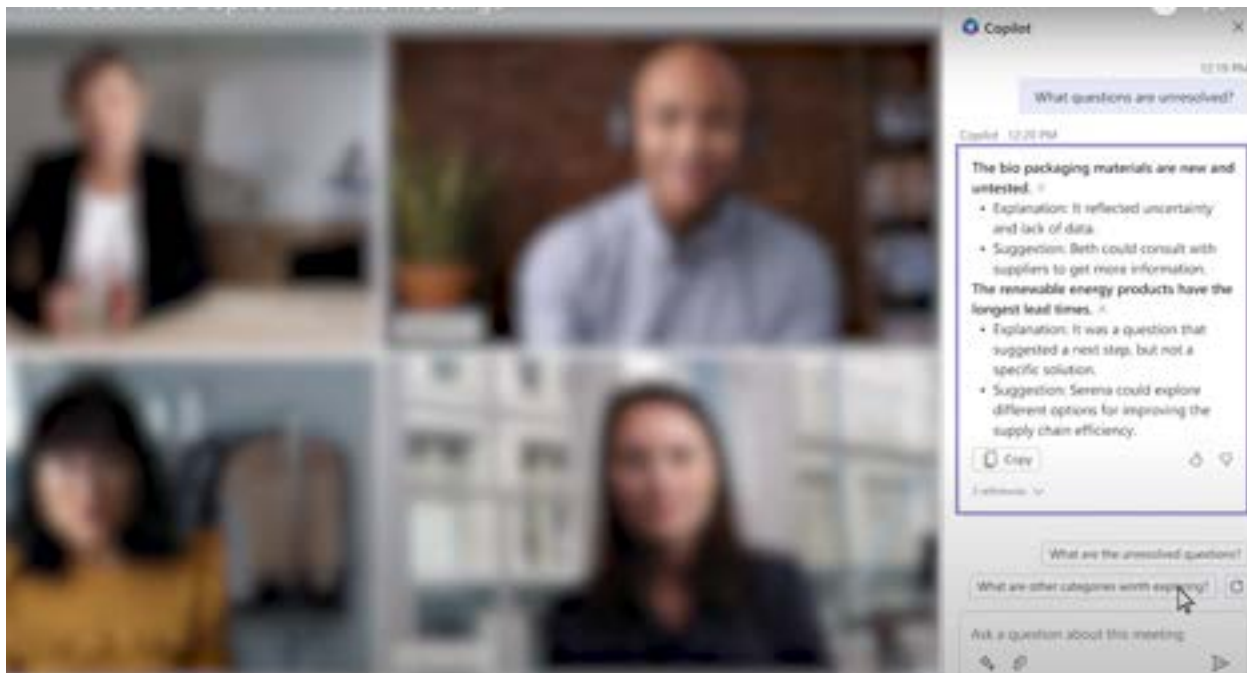
(without having to read the transcript).



This can even help understand concerns before they are missed or become an issue. For example, let's say you are on a Teams meeting and want to understand how people on the call feel about a topic. You could ask AI privately, and Copilot could share a summary of what it interpreted based on the discussion so far and the source(s) for its insights.



Then as the meeting wraps up, you could use it to ensure you understand what might still be unresolved or open that might need a follow-up discussion or notes prepared.

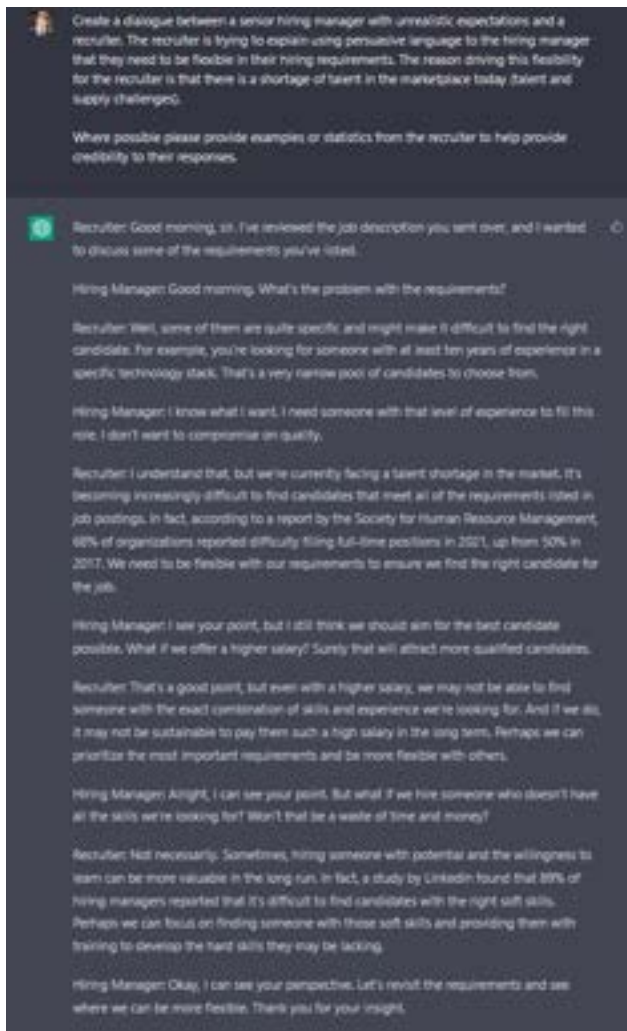


These are all just examples of working before, during and after a meeting. The way it can be used to analyze and understand transcripts from town halls, live events, and more can greatly benefit organizations and create new ways to provide better employee experiences and advance employee understanding.

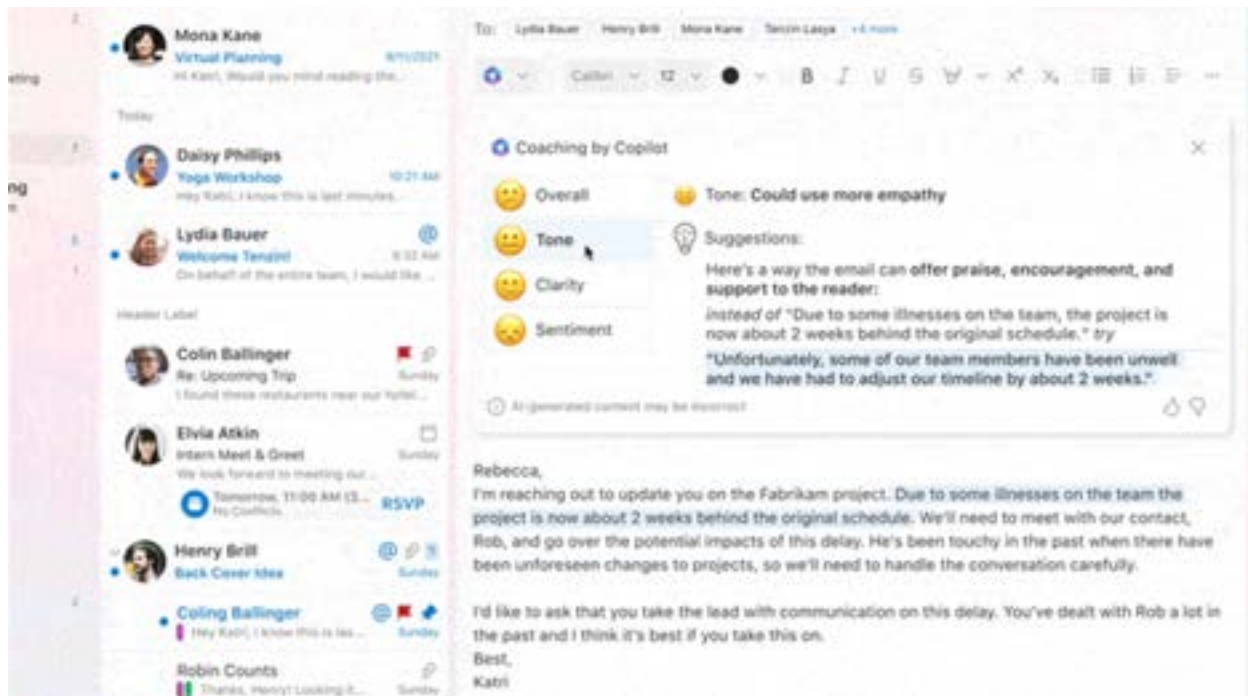
Use AI to Help with Tone Awareness and Messaging Style

When it comes to optimizing communication, you may have already used AI tools like Microsoft Copilot to take on a persona enabling interactive dialog and feedback or leveraging a particular person's writing can help craft your writing to mimic that style when writing for someone else or working to elevate your own communication.

This can even be used in testing or preparing for interactive discussions. In the below example using OpenAI ChatGPT, which you could recreate easily in Microsoft Copilot, you can see an example of a complete sample dialog that might help someone in the learning process or improve their pre-planned responses to get the desired communication outcome.



Understanding the nuances of human communication is a challenging task. Still, Microsoft Copilot's tone awareness and messaging style capabilities can provide these skills to many who can use them like a personal coach. For example, the tool can analyze the tone and style of draft messages, helping users respond appropriately. It can also suggest changes in the tone or style of outgoing messages to make them more effective. This ensures clear and effective communication and contributes to maintaining a positive and respectful workplace environment.



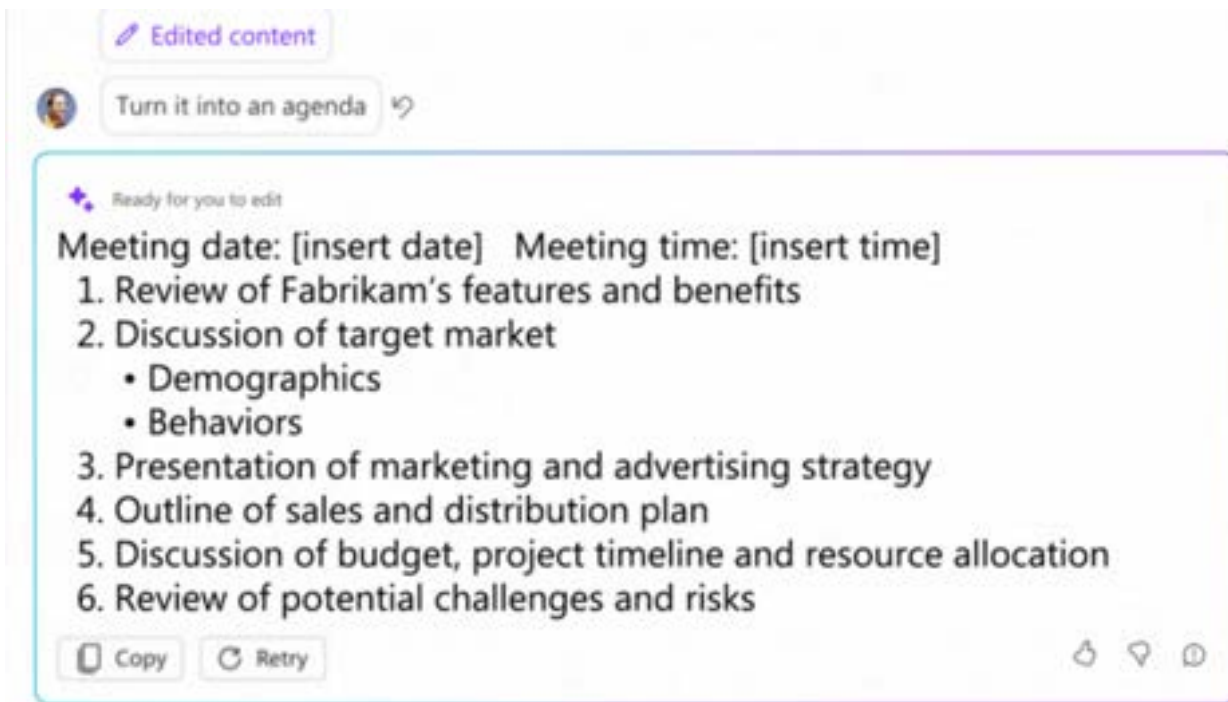
Shown above is an example where the writing process occurs, or you review your previously sent emails, you can find the right way to augment and improve your writing based on the outcome you want to achieve. Giving literary knowledge and mastery of effective communication that many individuals may not possess without the benefit of AI tooling.

Use AI to Provide Writing Support in the Flow Of Work

Microsoft Copilot's writing support is another feature that significantly enhances work efficiency. It offers real-time grammar and spelling checks, ensuring professional, error-free content creation.

It also provides contextual writing suggestions, helping users express their thoughts more clearly and persuasively. This feature is handy in today's remote work environment, where written communication is vital in daily operations.

This often doesn't just mean summarizing, optimizing, or researching, as noted before, but actively being a part of the process in aligning styling and improving the writing, formatting, and editing process itself.



Finally, Microsoft Copilot's writing suggestions feature is a boon to all professionals, regardless of their writing prowess. The tool uses machine learning to provide real-time suggestions on sentence construction, word choice, and grammar, helping users create high-quality content.

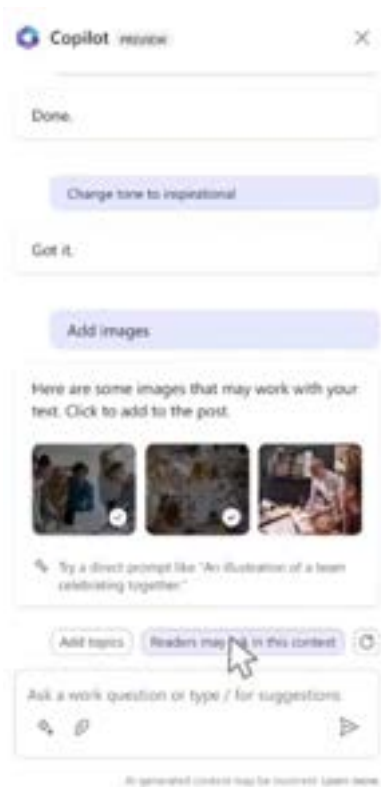
Moreover, inputting select information can leverage this to adapt future content to the user's writing style, providing personalized suggestions that align with their unique voice and tone. This feature not only boosts the quality of communication but also saves considerable time, allowing employees to focus on more critical tasks.

Use AI to Provide Suggestions and Recommendations

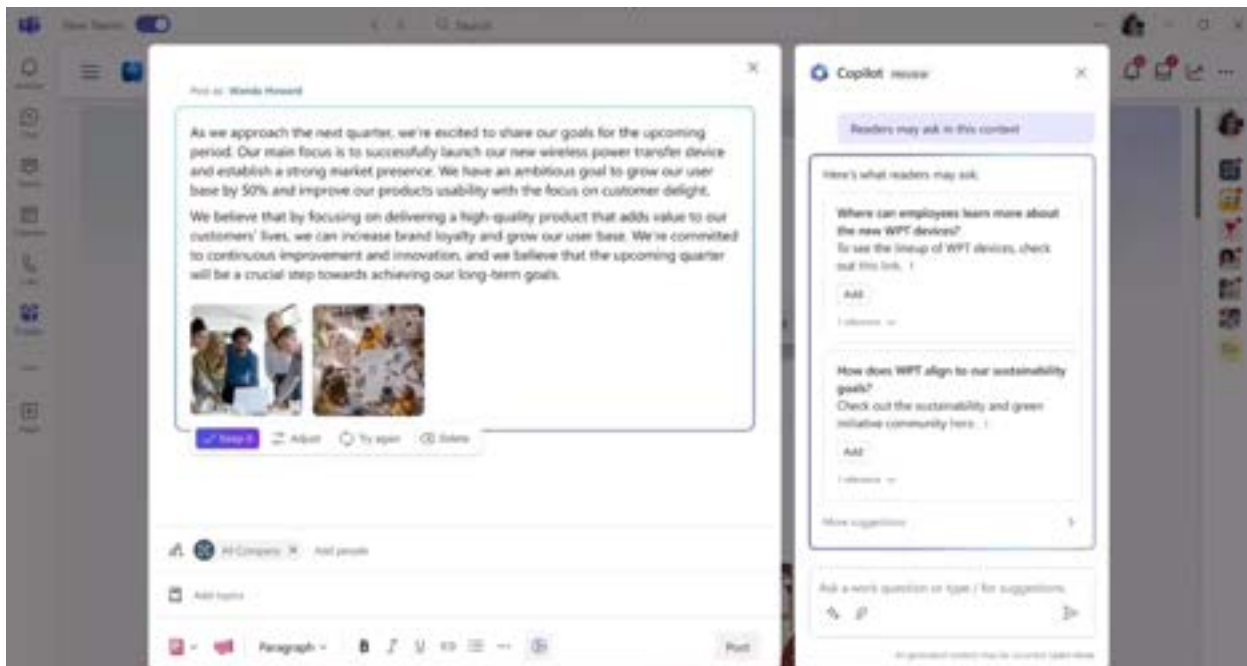
Whether you are looking for brainstorming support, starter content, best practices feedback, or more, Microsoft Copilot provides many ways to leverage it to provide recommendations and support the process. Like the acceleration and optimization of communication and collaboration, it's worth noting this is the beginning of the AI journey for many. Over time we will probably all use AI to provide recommendations to us outside of the context of our active and planned work.

This might naturally happen when writing and crafting content, such as a good enterprise social post in Microsoft Viva Engage, suggesting step-by-step ways to improve the content or quality of the social post. These recommendations naturally appear in the prompt itself based

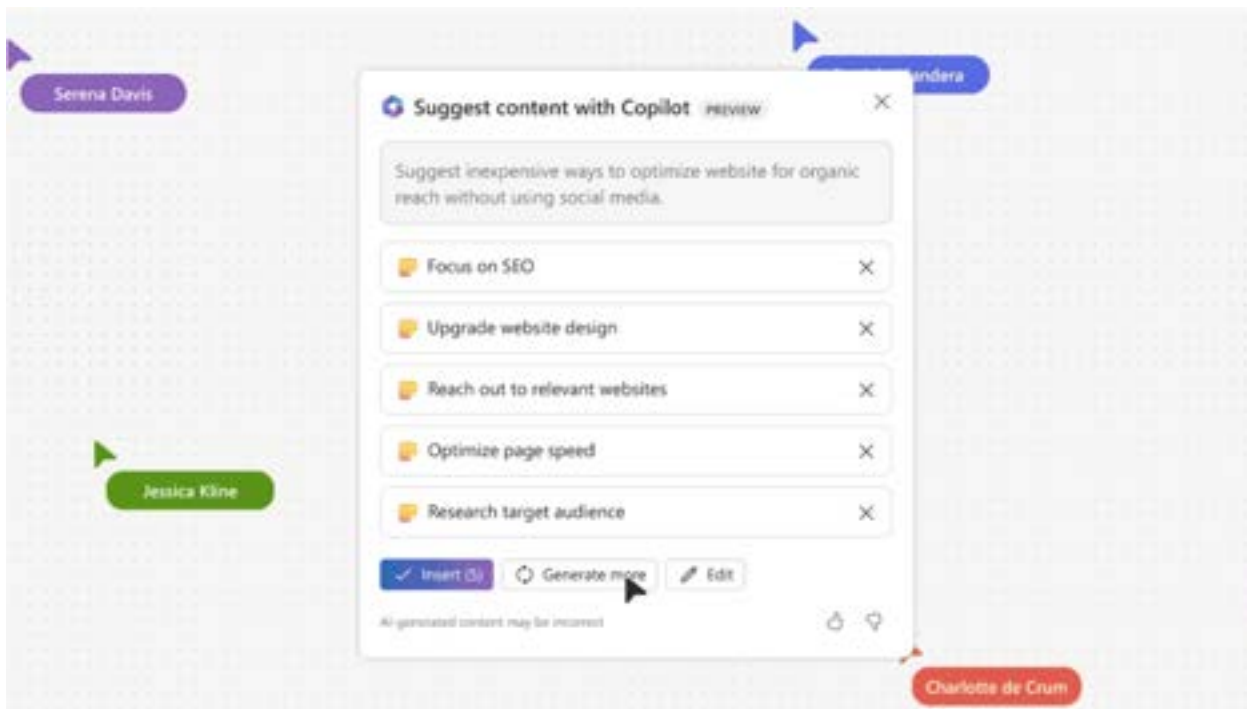
on the context of the previous copilot discussion and where and what you are working on, such as in the image below.



This results in suggested questions based on other contextually relevant references/information available within your organization, such as the two questions outlined in the image below.



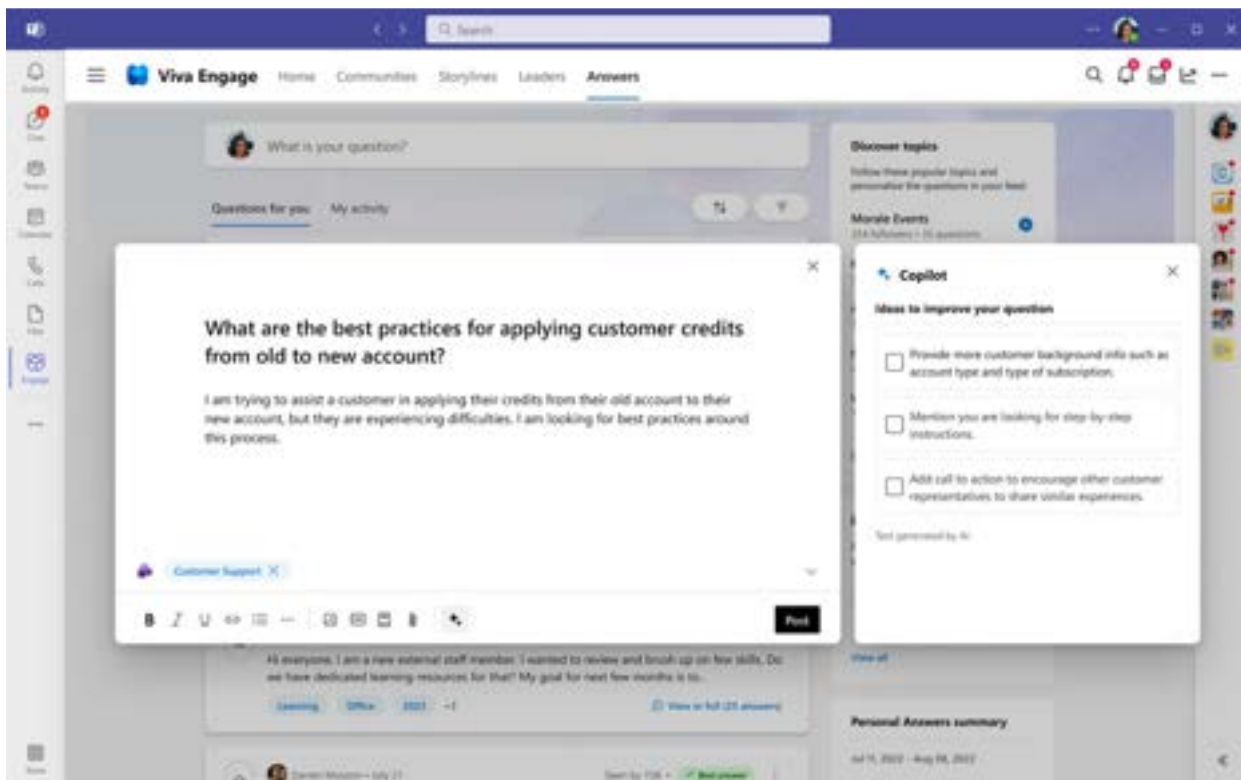
This doesn't just lead to better content, but it leads to more usage of Microsoft Copilot's AI-powered capabilities in all parts of the digital employee experience.



In the image above, we see another good example where a group of individuals are in an active whiteboarding session. Together each individual can use the AI capabilities of Microsoft

Copilot to provide contextual recommendations giving them all access to more information, knowledge, and ideas than before.

In another example image below, a common mistake people make when writing questions is not to include enough information, leading to the most popular initial response to request more insight. In this example, that step might be skipped leading to a faster response and a more effective capture of information relevant to future consumers of this question, and its answers.

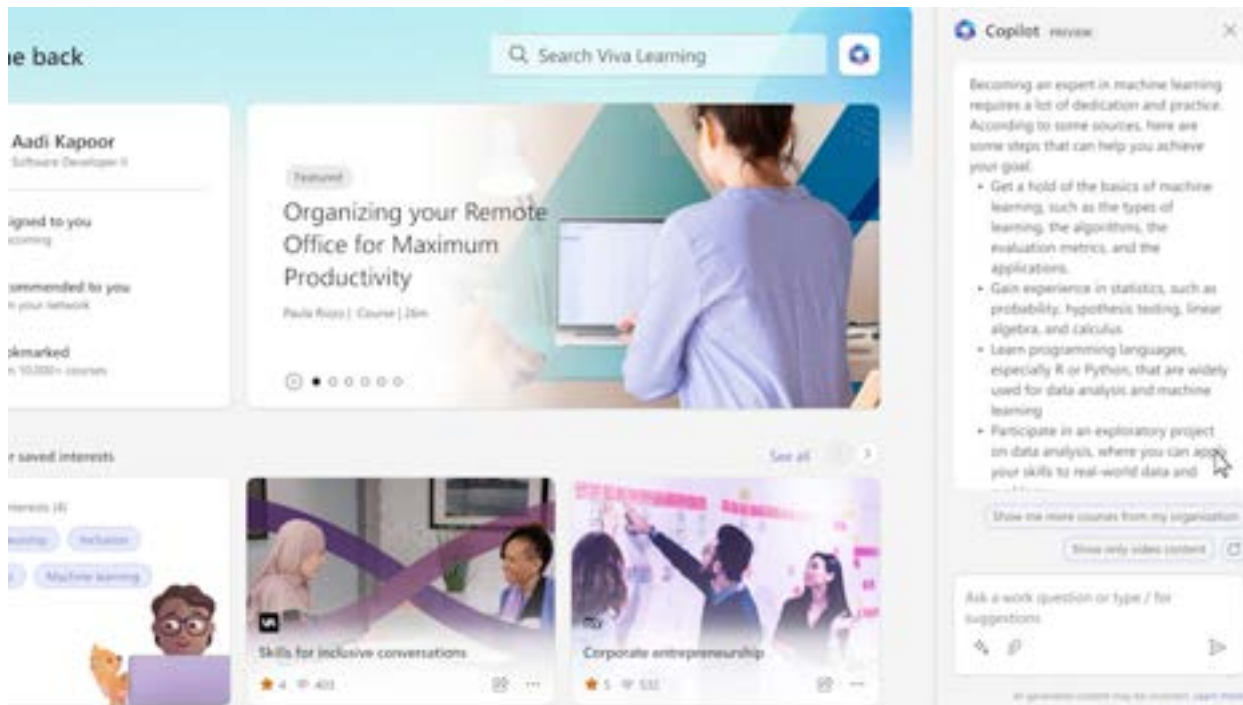


Imagine a scenario where your goal is not to write or collaborate on something, but instead to learn about something. In that scenario, the value of AI being able to reason over organization data and the skills/knowledge of the large language models provides an unprecedented way to explore and learn at your own pace with your own focus.



In the image above, you can see an interactive dialog with a topic identified within the organization. This topic understands contextual information around the topic, its content, people, and more, allowing for interactive knowledge discovery, interrogation, and exploration.

Below is an image showing how a user in Microsoft Viva Learning might ask a natural question about how to become an expert in machine learning. In the example, it provides broad-based guidance, but can also help the individual employee explore learning options in the organization, other topic experts, and more.



In one final example, imagine as a human resources or career development leader. You want to help an employee discover and understand other roles and opportunities in the business. You might have them do a common experiment by writing a dream job description. In this dream job description, they should write out the responsibilities they would like to have and the skills they want to leverage. Historically this would take considerable human effort to read over the job description and compare it to others across the business. Today that can be done with AI at a much more accelerated pace enabling the analysis of hundreds of existing job descriptions with this dream one to map out alignment and pathways while also being able to be used for the skill development and learning plan based on the examples above.

What key things do Microsoft 365, Viva, and Copilot bring to the Employee Experience?

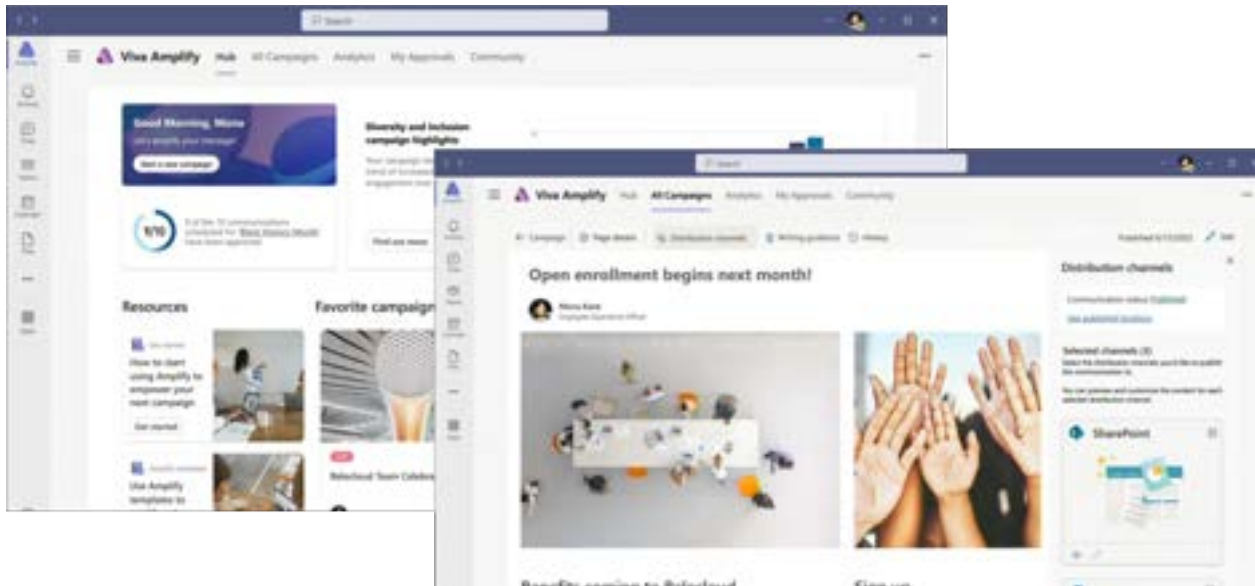
The following are the top applications within Microsoft 365 that impact the employee experience. Let's explore each of them from a high level and how they impact the employee experience.

- Microsoft Viva
 - Viva Goals
 - Viva Insights
 - Viva Topics
 - Viva Connections
 - Viva Amplify

Viva Amplify

Employee communication is a critical part of the digital employee experience. One of the biggest challenges with digital communication today is how to craft it well, how to distribute it effectively, how to amplify it, and how to understand and learn from its impact. These are areas of experience that are improved by using Microsoft Viva Amplify.

Viva Amplify provides writing guidance to help craft a message that resonates with targeted audiences. It provides a way to organize, collaborate and share campaign resources to set and measure communication outcomes. Analytics based on the campaign and its distribution channels can help gauge message impact and continuously improve communications.



Some of the biggest capabilities it provides are:

- Use one space to create, collaborate, publish and measure all your communication campaigns.
- Share communication across multiple channels at once and optimize content for chosen distribution channels such as Outlook, SharePoint, Viva, Windows 11, or elsewhere.
- Find writing guidance and preview content before publishing.
 - Viva Learning
 - Viva Engage
 - People In Viva
 - Viva Pulse
- Microsoft & GLINT
- Microsoft Loop
- Microsoft Search
- Microsoft Teams
- Power Platform
 - Power Apps
 - Power Automate
 - Power Virtual Agents
 - Power BI
 - Power Pages & Power Portals
- SharePoint
- Yammer
- Microsoft Copilot

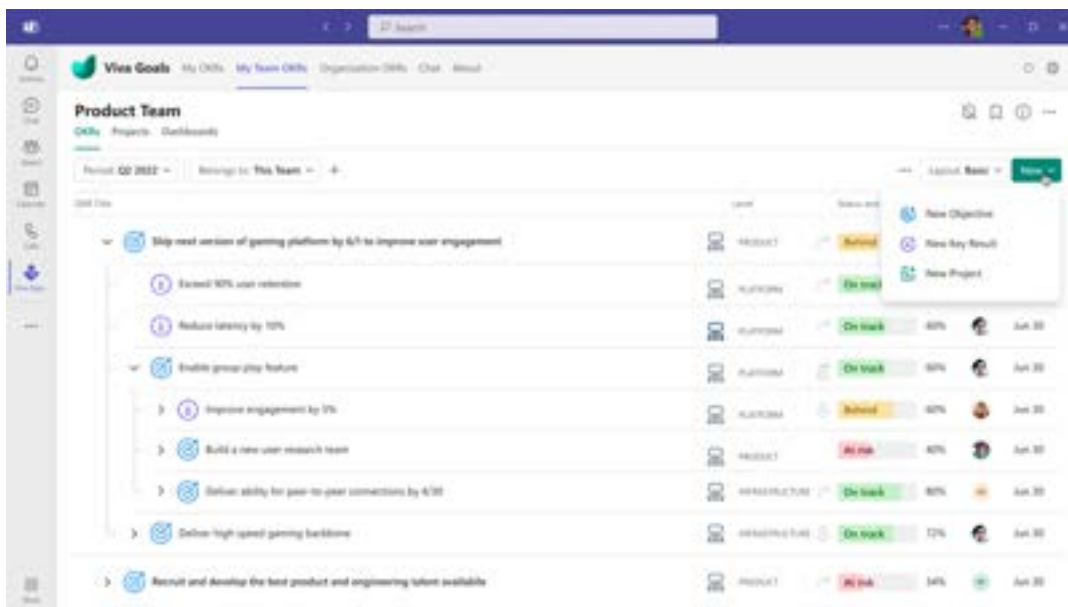
- Microsoft Places

Microsoft Viva

Microsoft Viva is Microsoft's employee engagement and employee experience platform. It has multiple components that relate to the employee experience and how they can greatly improve it.

Viva Goals

Viva Goals connects teams and individuals to your organization's strategic priorities, uniting them around your mission and purpose.



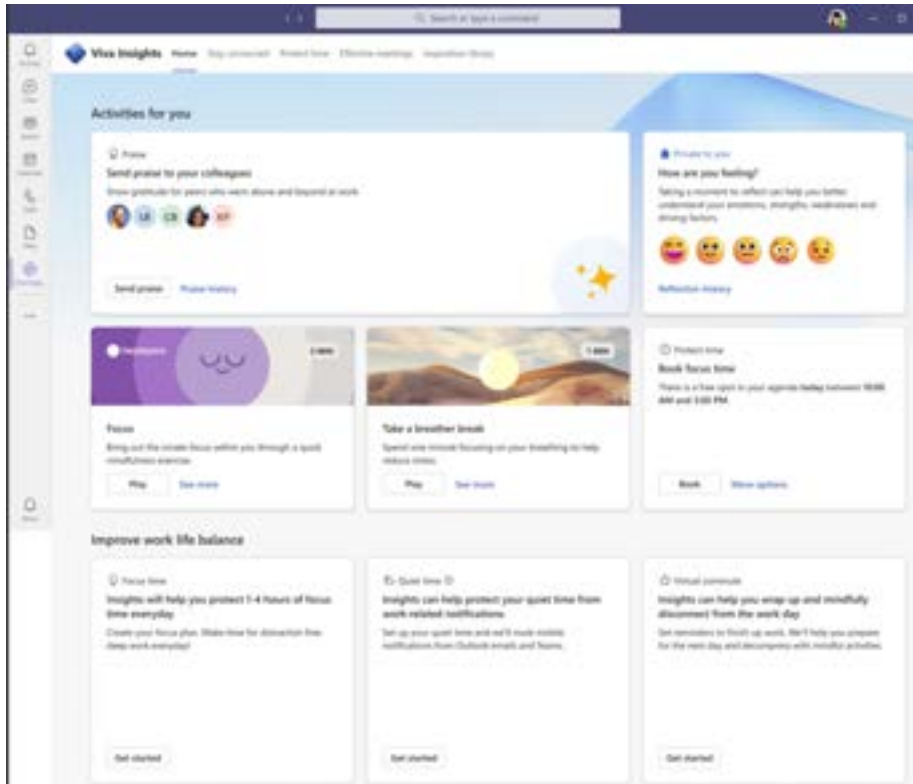
Some of the most significant capabilities it provides are:

- Improving clarity and staying aligned at scale: This enables organizations to create clarity by having one centralized source of truth for goal setting, monitoring progress, and assessing success across the organization.
- Prioritization and focus support: By having the ability to easily share progress across your organization and team with customizable dashboards, it can help everyone focus on the impact that matters most instead of just the effort or activities involved in the work.
- Keeping goals top of mind: By bringing goals and their related data and actions into the spaces teams are already using, like Microsoft Teams, ADO, and the most popular data

and project management tools, we can make goal engagement and visibility much higher.

Viva Insights

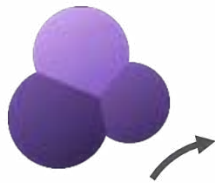

Viva Insights gives everyone a look into how they might be able to improve their performance, their team's performance, or the entire organization's performance as it relates to digital behaviors.



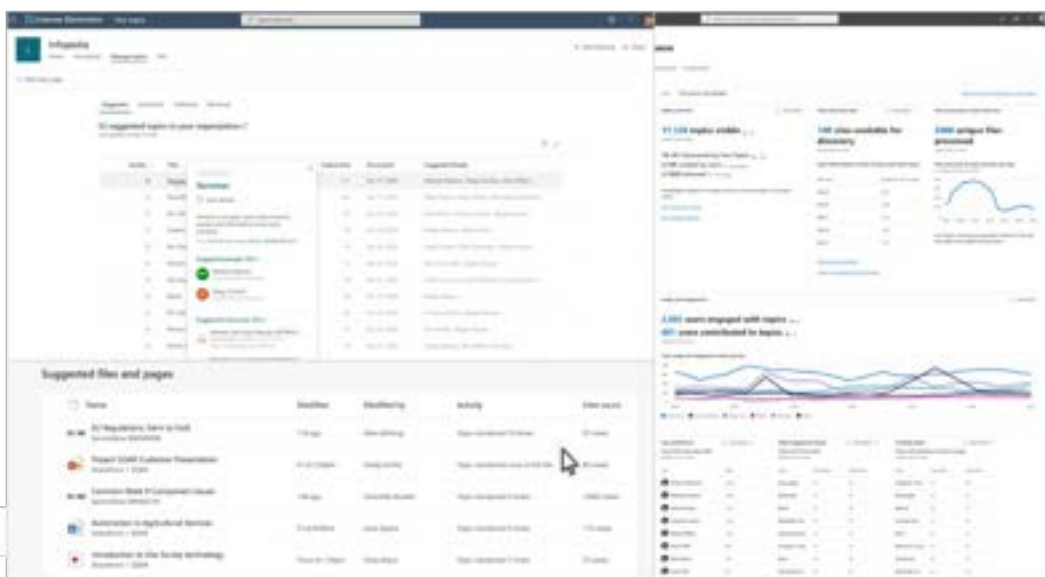
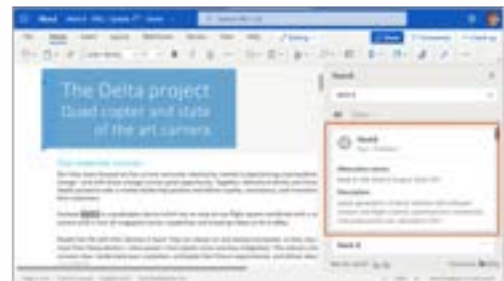
Some of the most prominent capabilities it provides are:

- **Personal insights:** By allowing employees to monitor their insights into how they digitally work. This can empower employees with insights that improve their collaboration, focus, and wellbeing. This might be actioned by taking recommended breaks between meetings, having AI support in suggesting when and where to protect time for focused work, and providing ways to disconnect after hours mindfully.
- **Manager and leader insights:** By allowing leaders to leverage insights and AI-assisted guidance to improve wellbeing, engagement, and effectiveness across their teams or the organization.

- ## Viva Topics



The screenshot displays the Microsoft Dynamics CRM 2013 user interface. On the left, a navigation pane shows various entities like Accounts, Contacts, Leads, and Opportunities. The main area is divided into two panes. The left pane shows a list of 'Accounts' with columns for Name, Address, and Phone. The right pane shows a detailed view of a selected account, including fields for Name, Address, Phone, and a list of related entities like Contacts and Opportunities.



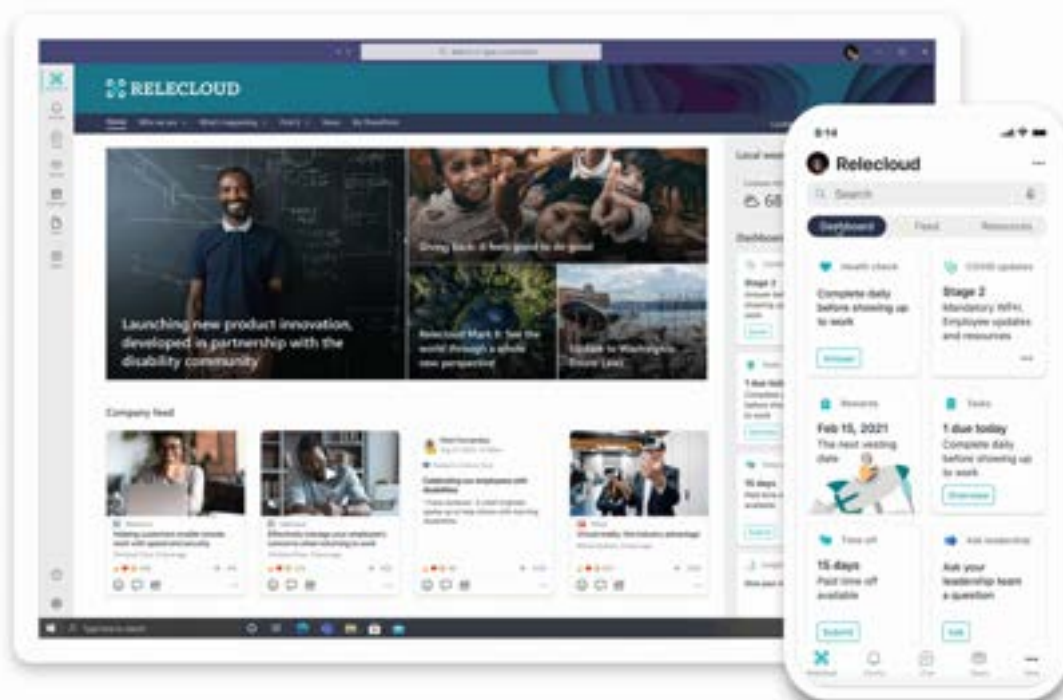
Page 60 of 126

**YOU WILL LOVE THE WAY WE WORK.
TOGETHER.**

- Turn content into knowledge: Use AI to identify, process, and organize people, content, spaces, and more across your organization's data automatically and continually. You are empowering an employee experience with access to more intelligent content and people than ever before.
- Curate and organize knowledge: Help your organization's experts identify, refine and cultivate topics and related resources with topic pages and topic cards. Providing AI-supported insight for those who have curated content for years on what content, people, spaces, and more they may have never had the time to effectively address in the past.
- Make knowledge easy to discover: Automatically display topic cards across Microsoft 365 apps to help employees discover knowledge in the context of their work. This rich experience brings knowledge, people, and content to the employee when and where they need it without them having to find it.

Viva Connections

Viva Connections helps teams collaborate and communicate in one location. It promotes inclusion by placing value on each member's ideas. It also aligns vision and mission within the hub for work of the organization, Teams.



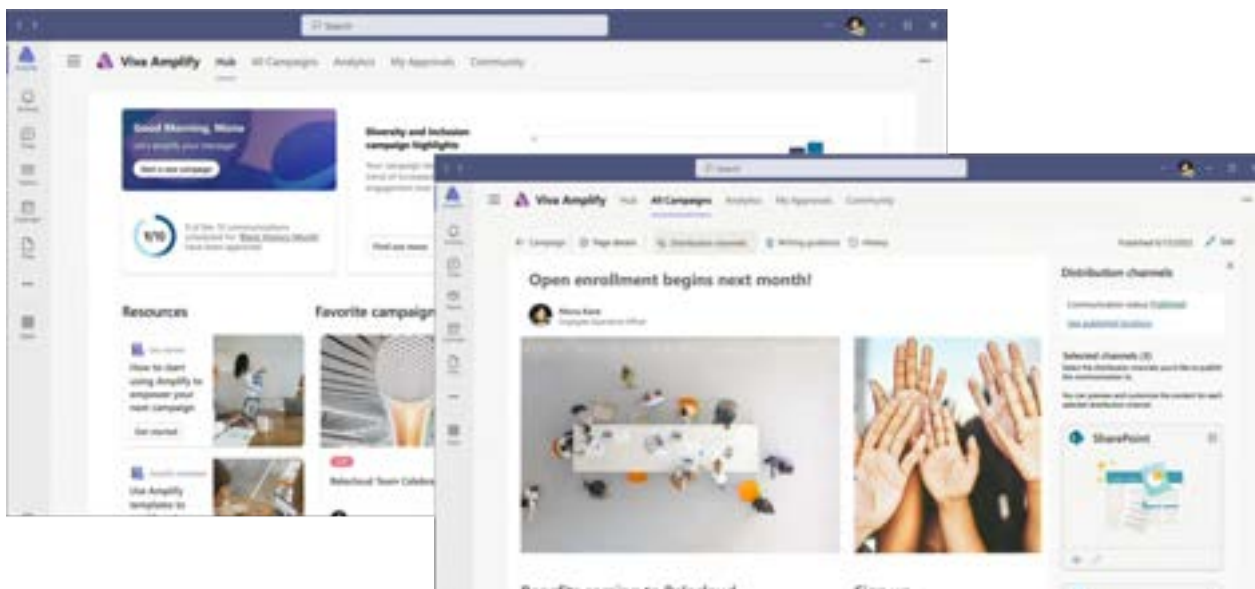
Some of the biggest capabilities it provides are:

- Connect people: By amplifying culture Viva Connections can promote workplace communication by bringing together news, conversations, and resources that inform, inspire, and engage.
- Empower employees: By rallying and motivating employees with a more connected experience we can foster a culture of inclusion, manage organizational change with transparency, and encourage meaningful workplace connections.

Viva Amplify

Employee communication is a critical part of the digital employee experience. One of the biggest challenges with digital communication today is how to craft it well, how to distribute it effectively, how to amplify it, and how to understand and learn from its impact. These are areas of experience that are improved by using Microsoft Viva Amplify.

Viva Amplify provides writing guidance to help craft a message that resonates with targeted audiences. It provides a way to organize, collaborate and share campaign resources to set and measure communication outcomes. Analytics based on the campaign and its distribution channels can help gauge message impact and continuously improve communications.



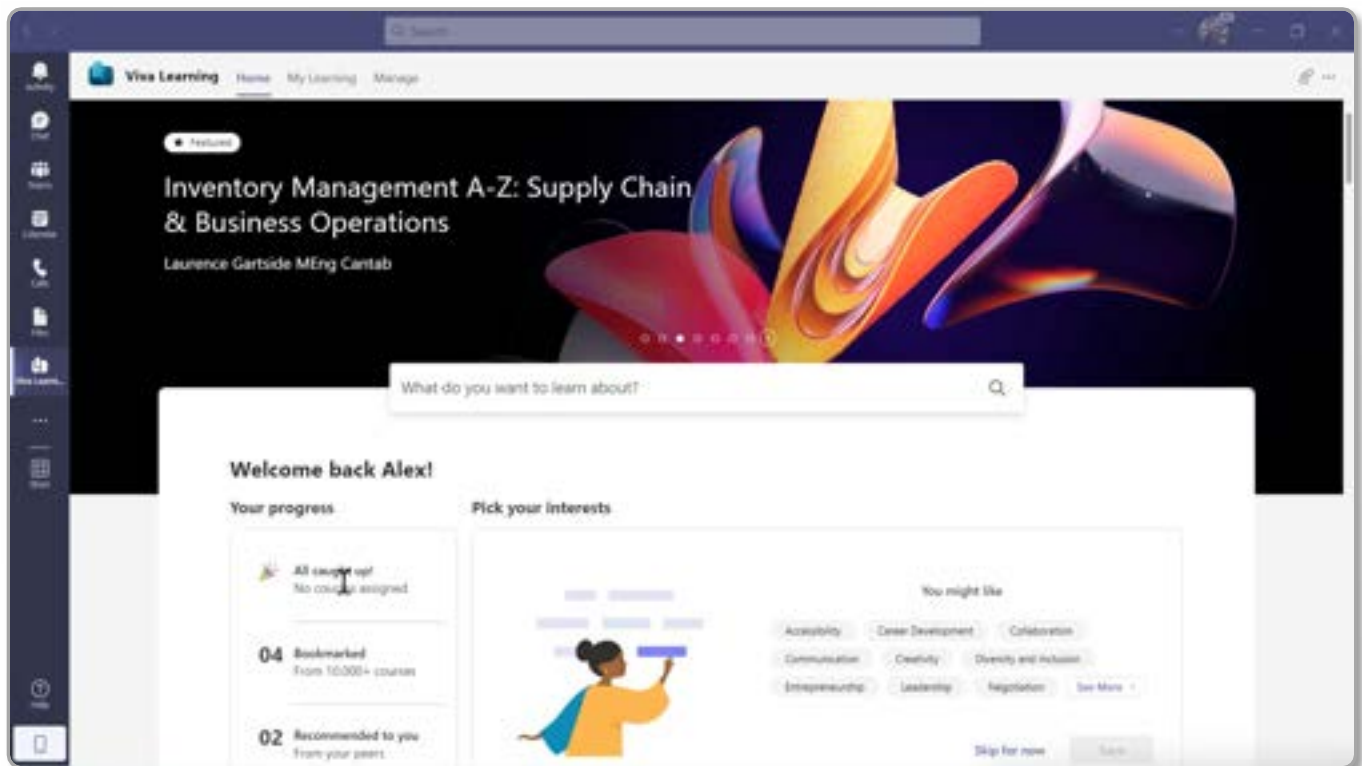
Some of the biggest capabilities it provides are:

- Use one space to create, collaborate, publish and measure all your communication campaigns.
- Share communication across multiple channels at once and optimize content for chosen distribution channels such as Outlook, SharePoint, Viva, Windows 11, or elsewhere.

- Find writing guidance and preview content before publishing.

Viva Learning

Viva Learning is a learning and development platform. It can be customized based on personal career paths. It also incorporates learning into everyday tasks, processes, and the tools people already use with Microsoft Teams and Microsoft 365.

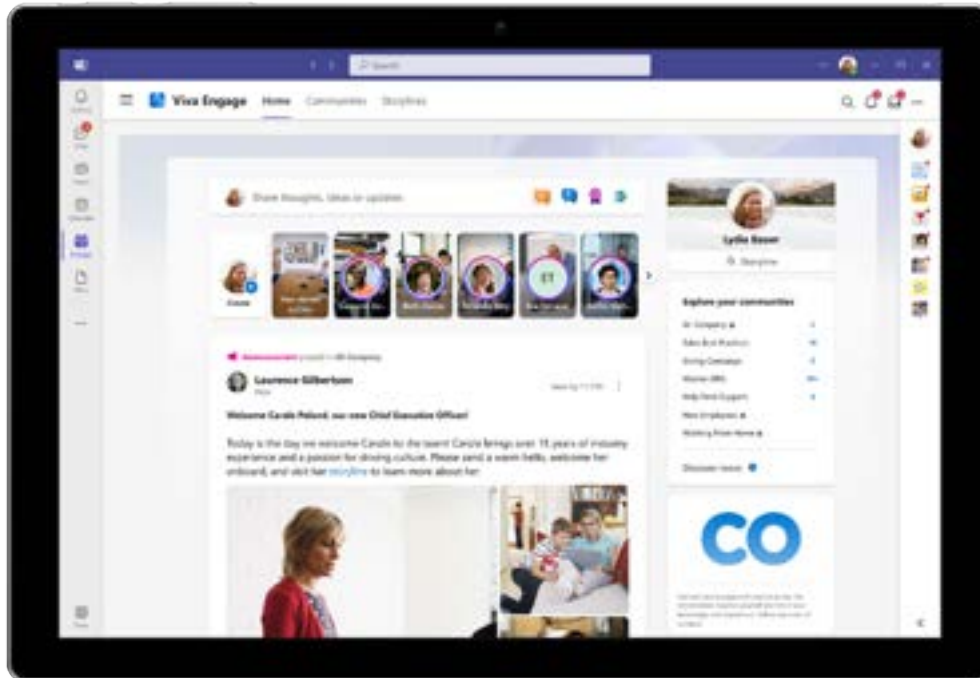


Some of the biggest capabilities it provides are:

- Make learning collaborative: Encourage social learning with Teams chat, tabs, and peer recommendations.
- Empower employees to control their learning journey: Support employees' learning goals with bookmarks, assignments, personalized suggestions and calendar prompts.
- Aggregate learning from your organization: Help employees find relevant content from connected learning providers, learning management systems, and your company resources.

Viva Engage

Many organizations can elevate employee experience by adding the ability to have a space shaped for social interaction, including stories, that can facilitate employee connectivity between in-person, remote, and hybrid workers to create moments that matter. This can help to foster and build meaningful relationships at work while giving employees a place to connect, express themselves, and find belonging.



Some of the biggest capabilities it provides are:

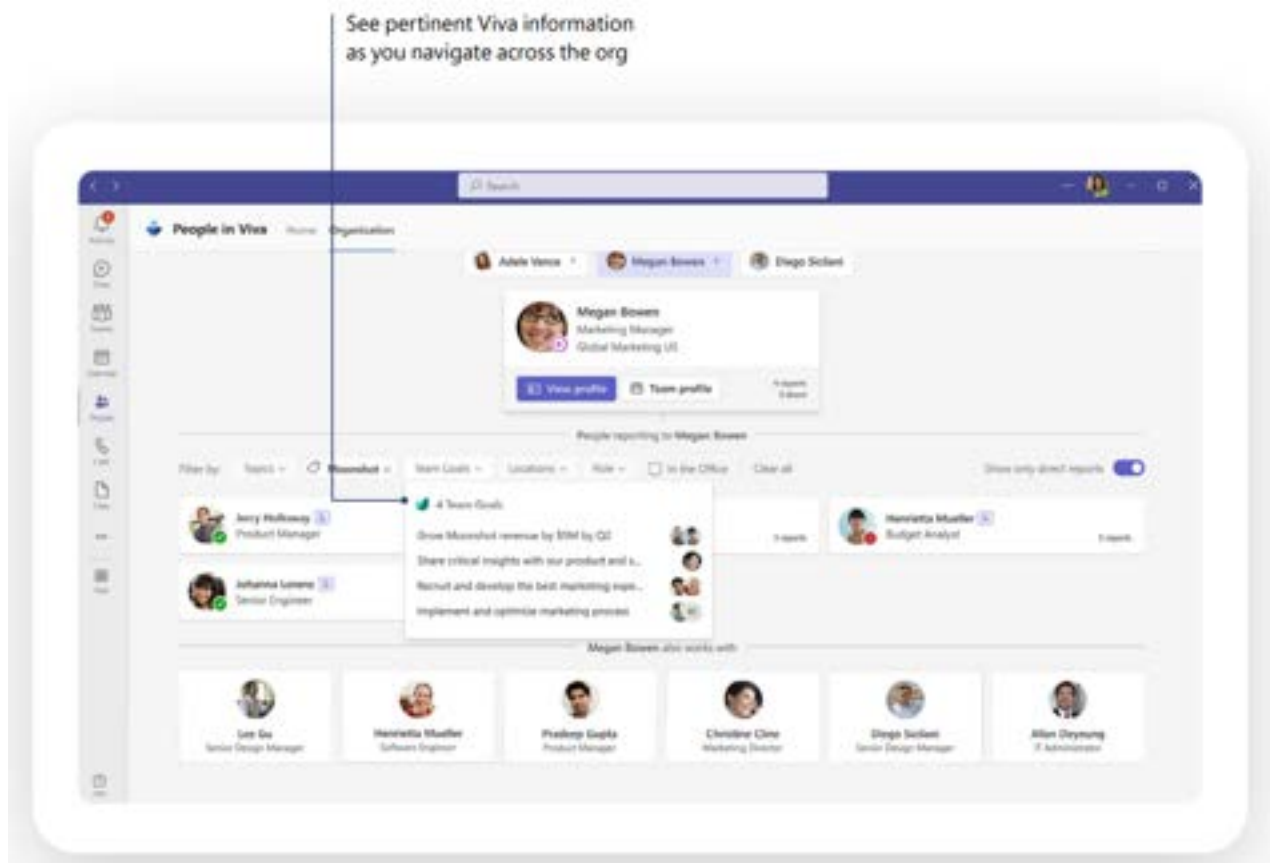
- Create, build and join employee communities: Connect with coworkers in communities built around interests, job types, departments, and everything else to find belonging at work.
- Share and discover knowledge: Encourage open sharing and exchanging of ideas, questions, answers, and best practices.
- Encourage self-expression and share your unique voice: Use Viva Engage to share what you're passionate about and connect with people who share your interests.
- Leadership corner experiences such as the "Ask Me Anything" format let leaders connect with employees where they are already engaging and building communities while providing leaders with deeper insights and actionable recommendations into what's top of mind for employees.

- Match questions to answers from experts across the organization and put collective knowledge to work, leveraging AI to highlight approved responses, recommended topics, and experts for greater context.

Note: It's important to note that while Viva Engage has an answers experience and Viva Topics has an answers experience Microsoft over time may elevate this as it's own set of experiences. This super experience around answers would be called Answers in Viva.

People In Viva

People are at the center of employee experience. People in Viva is a digital experience that helps colleagues discover connections and experts across their organization. Available through Microsoft 365 profile cards and as a new app, People in Viva is powered by AI to unlock information across interests, knowledge, and goals to improve collaboration and team building.

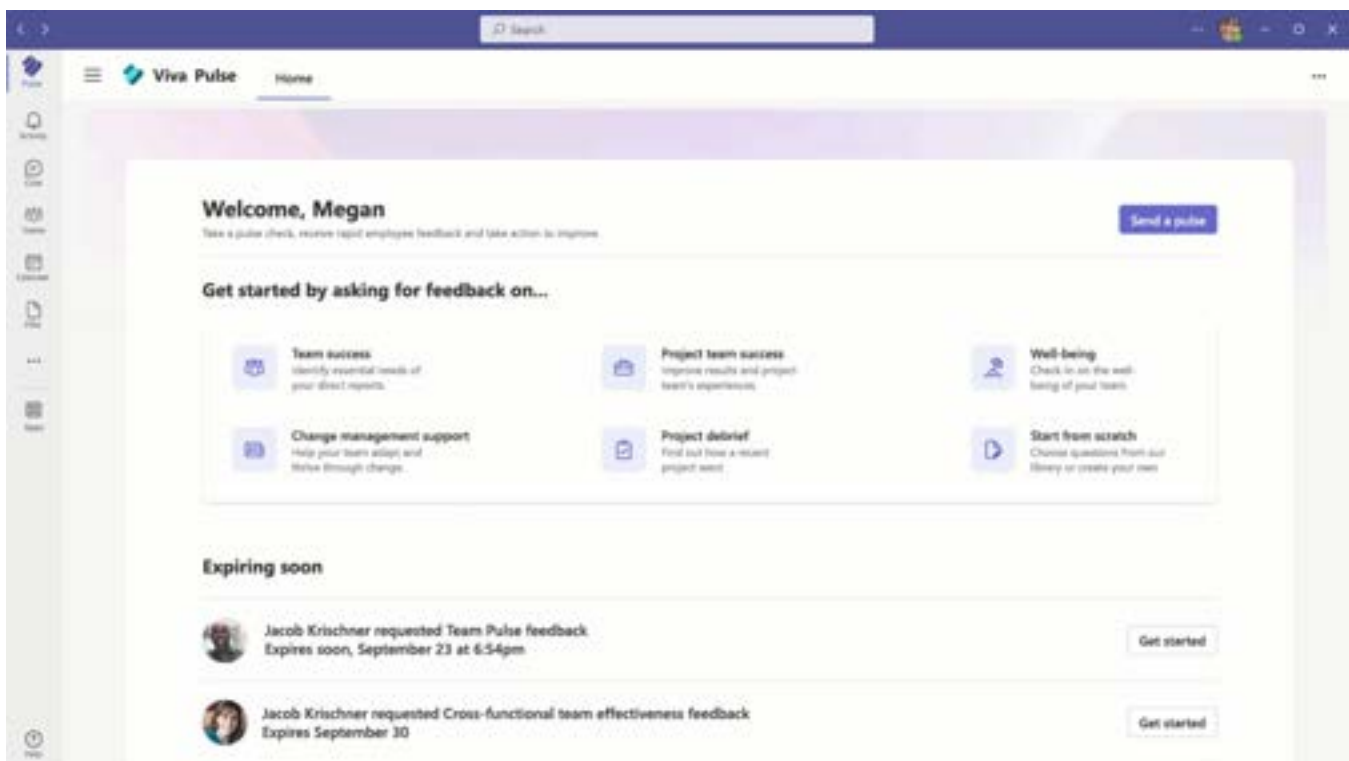


Some of the biggest capabilities it provides are:

- The ability to not just navigate organization charts but to further refine and filter these to discover people (and where they fit) based on topics, goals, work modes and more.
- Integrated where people already work throughout the Microsoft digital experience via people cards. Available also through a more focused app experience in Microsoft Teams.

Viva Pulse

Enabling managers and team leaders to seek regular and confidential feedback on their teams experience is a critical capability to remain informed and to action employee experience improvements. Viva Pulse uses smart templates and research backed questions to help managers pinpoint what's working well and where to focus, and also provides suggested learning and actions to address team needs.



Some of the biggest capabilities it provides are:

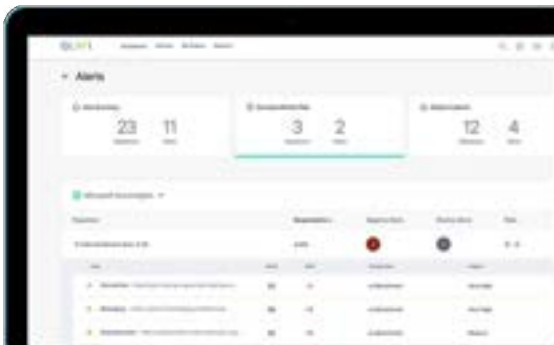
- Through the use of smart templates, research-backed questions, and more managers and team leaders can request regular, confidential feedback on their teams experience.
- Along with results that include sentiment analysis and trends, Viva Pulse provides next steps, suggested actions, and recommended learning based on the feedback received.

- Managers can choose to share de-identified and aggregated results with their teams to spark conversations on important topics to help drive team success and outcomes.

Microsoft & GLINT

Today Viva Pulse and Microsoft GLINT helps organizations to create a thriving culture of engaged employees and inspiring leaders through automated programs that make gathering feedback simple, giving your people a steady voice and helping you better understand your organization. Viva Insights, Pulse and Glint help organizations capture valuable employee feedback and translate insights into actions, allowing managers and teams to measure and improve the employee experience.

Note: Keep in mind that some experiences in GLINT are NOT represented in Viva Pulse today.



Some of the biggest capabilities it provides are:

- Keep your finger on the pulse: Business is always changing, so measure employee sentiment in real-time with survey programs spanning engagement, lifecycle, manager and team effectiveness, culture, D&I, and development.
- Get AI-driven insights: Capitalize on the latest science of happiness in the workplace. Proprietary AI for HRTM and predictive intelligence aggregate and analyze feedback, surfacing opportunities and issues and helping you connect the dots between how work is happening and how employees feel.
- Equip every manager to take effective action: Empower managers to understand and respond to their team's needs, invite their employees into the conversation to identify solutions, learn through integrated LinkedIn Learning content in the Glint platform, and build better team practices over time.

Microsoft Loop

Microsoft Loop is a new app that combines a powerful and flexible canvas with portable components that stay in sync and move freely across Microsoft 365 apps. Work in chat, meetings, or documents using portable components that are always up to date. Connect naturally with emojis and expressions. Easily collaborate and track progress with notifications, highlighted changes, status labels, task lists, and more.

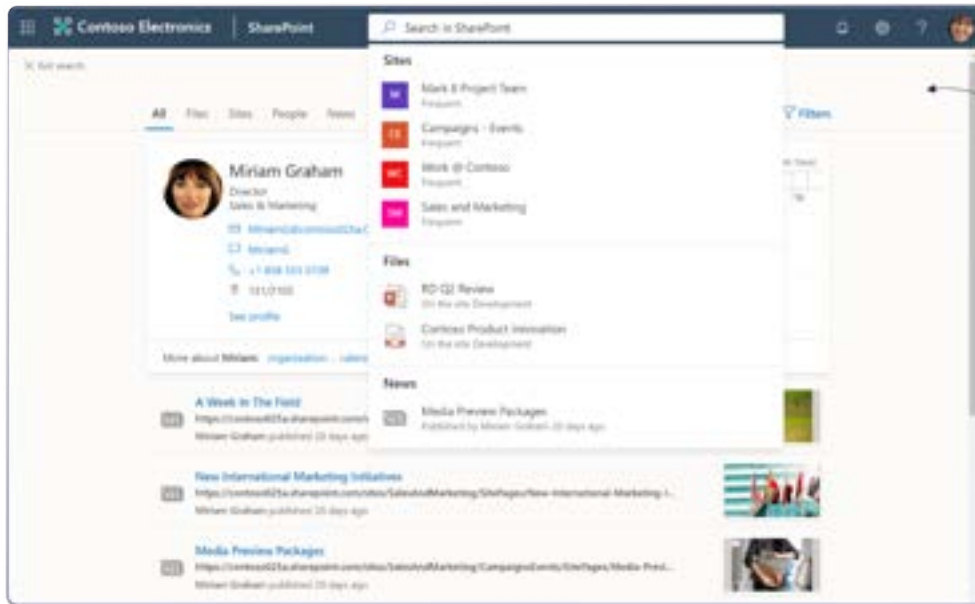


Some of the biggest capabilities it provides are:

- **Workspaces:** Organize what you need for your project, such as files, links, and data from other apps, in a single workspace.
- **Pages:** Organize your Loop components and important elements in your project, such as links, files, and data in Loop pages; flexible canvases that can grow to match the size of your ideas.
- **Components:** Collaborate in the flow of work with Loop components. Work together on lists, tables, notes, or even a customer sales opportunity from Dynamics 365 on a Loop page or in a chat, email, meeting, or document.

Microsoft Search

Microsoft Search helps you find what you need to complete what you're working on. Whether you're searching for people, files, organization charts, sites, or answers to common questions, you can use Microsoft Search throughout your workday to get answers.



Microsoft Graph gleans insights from the people, sites and documents you work with, and ranks search results relevant to your needs.

You'll still be able to see all the results that satisfy your query, but personalized search will prioritize the results that are most likely to achieve your objective.

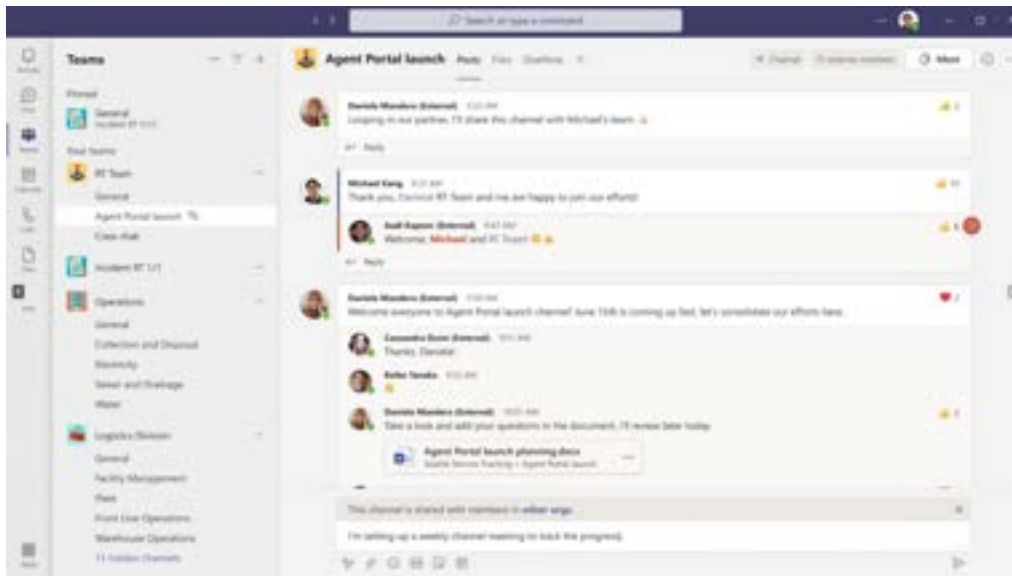
Some of the biggest capabilities it provides are:

- Available across the employee experience: From SharePoint, OneDrive for Business, Teams, Office Applications, Windows, Bing For Business, and more, you can run a search and find the content, people, or answers you need while quickly getting back to what you were doing.
- Easy to search: Microsoft Search suggests results based on an employee's previous activity in Microsoft 365, right in the search box.
- Find shared files faster: Microsoft Search uses advanced query understanding to make finding shared files simple, making it easier for employees to find files they are collaborating on.
- Show relevant content and promote results: Microsoft Search will promote the information and answers employees need to complete tasks such as policies, benefits, resources, tools and more with the ability to target specific groups, like new hires, remote workers, or different geographies to provide more targeted experiences or results.
- Integrated and extensible: Microsoft provides connectors to 17 systems and services today as a 1st party and there are [hundreds of pre-built connectors from vendors](#) available for an organization to use to create a truly integrated employee search experience.

Microsoft Teams

Teams is an application that helps teams communicate and share knowledge. It has chat grouping capability through Teams and Channels, allows employees to conduct video meetings, supports employees with file storage, and enables direct chat.

Teams is the hub for work within the organization and act as the window into many of the other applications of Microsoft 365.



Some of the biggest capabilities it provides are:

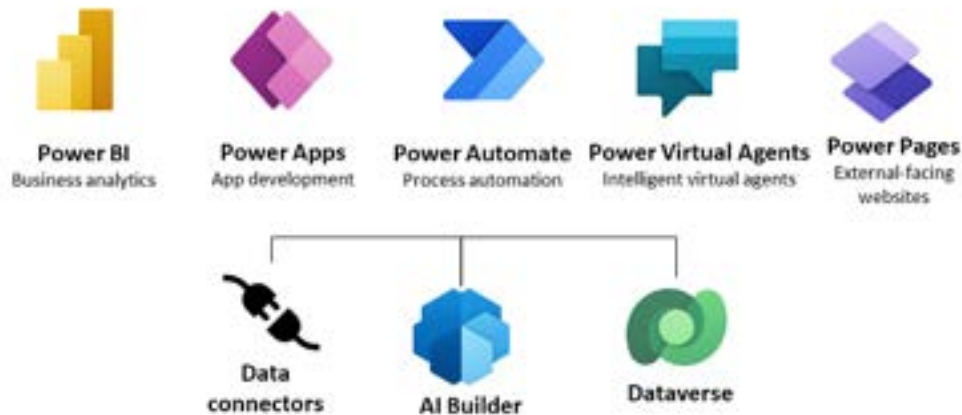
- Connect naturally: Chat, call and share videos simply from one place that helps you stay close to everyone in your life.
- Make something great together: With shared documents and files always available, you can create, share, and exchange ideas whenever you want to and keep things moving forward together.
- Stay in the flow: When all the best apps and features that you need are at your fingertips, you become more focused and efficient.

Power Platform

The Power Platform is an extensive business process automation and analytics application suite. The Microsoft Power Platform is powerful alone but even better together as it's more than the sum of its parts. If you connect Power Platform's parts together along with Microsoft

365, Dynamics 365, Azure, and hundreds of other apps, you can build end-to-end business solutions more efficiently and faster.

The low code platform that spans Microsoft 365, Azure, Dynamics 365, and standalone apps.



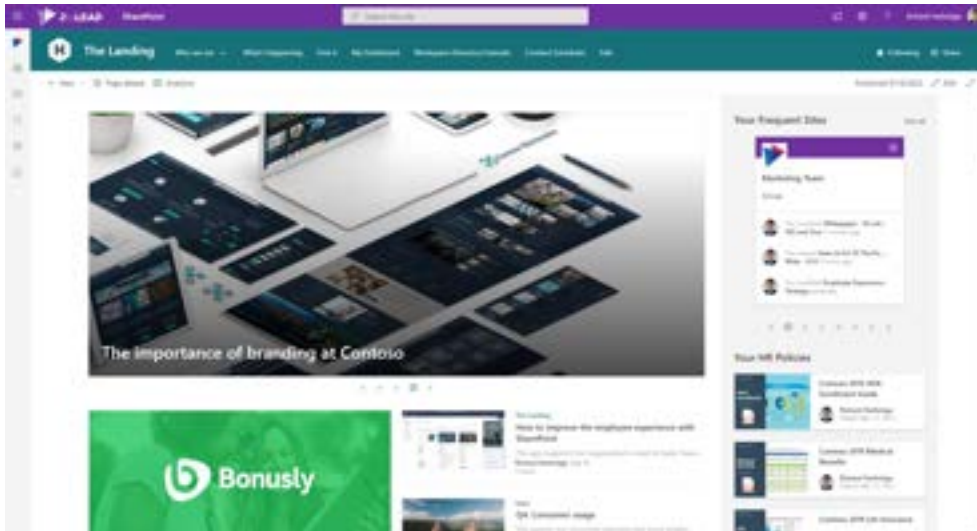
Key capabilities within the Power Platform include:

- PowerApps: Turn ideas into organizational solutions by enabling everyone to build custom apps that solve business challenges
- Power Automate: Boost business productivity to get more done by giving everyone the ability to automate organizational processes.
- Power Virtual Agents: Work with the Teams app. It allows for easy scheduling and task management. Dataverse works with Teams to allow users to create chats and apps within the app.
- Power BI: A very powerful analytics platform that allows for data visualization and AI-based information insights. This enables employees to make informed, confident business decisions by putting data-driven insights into everyone's hands.
- Power Pages & Power Portals: This Enables employees to quickly build low-code business websites for delivering vital information and services to your partners and customers.

SharePoint

SharePoint is a powerful and streamlined way for teams to share and communicate. It allows employees to house content, engage on intranets, and collaborate with external partners on extranets.

SharePoint allows users to collaborate from anywhere. It also allows them to share and create new ideas. If digital transformation is a goal of your organization, SharePoint can help achieve it.

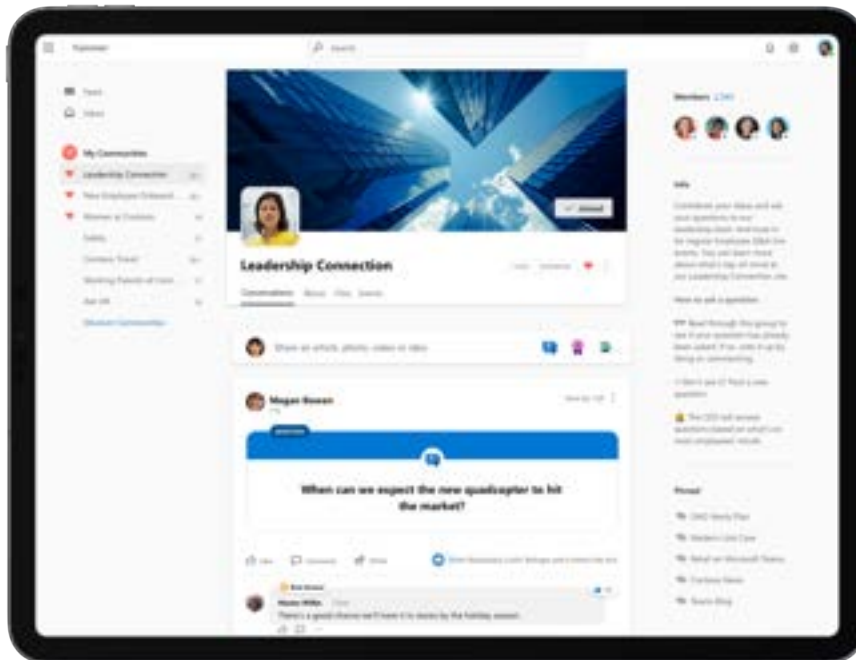


Some of the biggest capabilities it provides are:

- Simple sharing and seamless collaboration: SharePoint empowers teamwork with dynamic and productive team sites for every project team, department, and division. Share files, data, news, and resources. Customize your site to streamline your team's work. Collaborate effortlessly and securely with team members inside and outside your organization across PCs, Macs, and mobile devices.
- Engage and inform your organization: Build cohesion and inform your employees throughout your Intranet. Drive organizational efficiency by sharing common resources and applications on home sites and portals. Tell your story with beautiful communication sites. And stay in the know with personalized, targeted news on the web and the SharePoint mobile apps.
- Harness collective knowledge: You're just a click away from what you are looking for, with powerful search and intelligent ways to discover information, expertise, and insights to inform decisions and guide action. SharePoint's rich content management and valuable connections and conversations surfaced in Yammer enable your organization to maximize the velocity of knowledge.

Yammer

Yammer is a social network for businesses. It allows you to engage with leadership, ask questions and promote answers, and host live events for the entire organization.



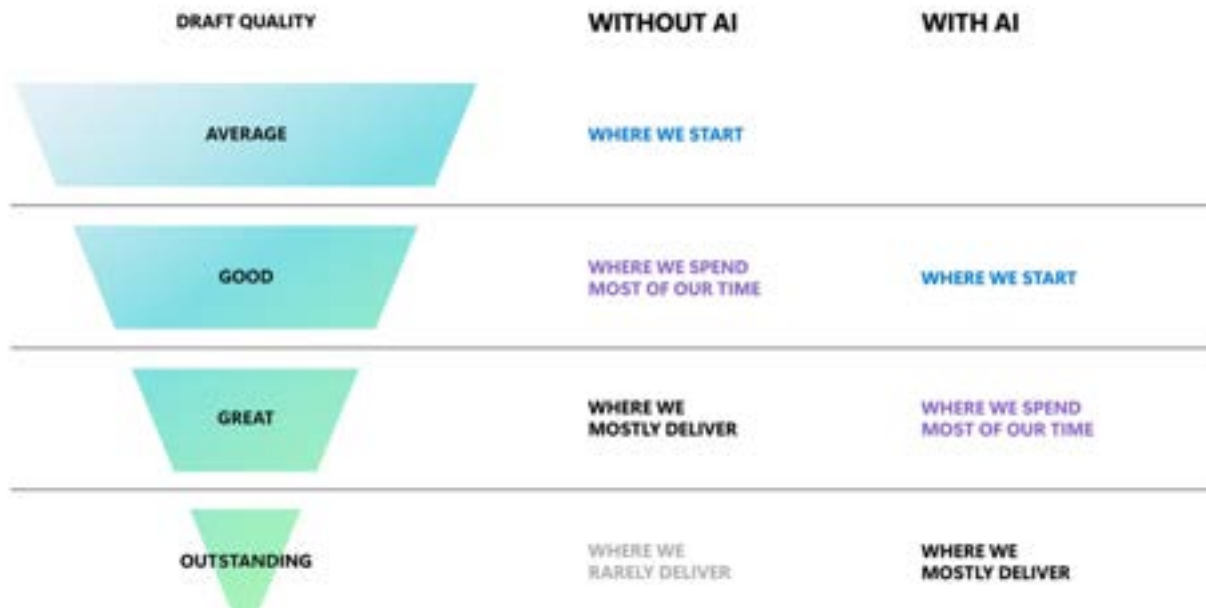
Some of the biggest capabilities it provides are:

- Open and dynamic communication across your organization: Improve engagement and enhance communication in your organization. Build communities of interest, gather ideas and feedback, and keep everyone informed, aligned, and moving forward with help from Yammer.
- Conversations and communities across Microsoft 365: Join the conversation and connect with coworkers in the apps you use everyday. Refer to Viva Engage for more insights here.

Microsoft Copilot

Microsoft Copilot, embedded within Microsoft 365 and Viva, assists employees in being more productive by providing contextual help within the workflow. It's like having an intelligent assistant always ready to guide you through complex tasks or offer information to boost your proficiency in using Microsoft applications.

AI, in this way, doesn't just lead to faster and more skilled communication, collaboration, and management but delivers better results. This is often due to the focus on how Copilot collaborates with the employee, but the employee is always in the pilot role. AI systems like Microsoft Copilot start employees further ahead in the process by doing some of the initial work and accelerating the work involved in improving the quality of the content or collaboration that occurs in the workplace.



The figure above is a good visual that outlines how we often start further into the process when we use AI, saving valuable time and getting assistance where the technology can aggregate, format, and prepare the draft we need. What's more, because AI systems like Microsoft Copilot understand the technology we are interfacing with, they can often do this faster and more efficiently than we can, enabling more people to deliver higher quality because they no longer need to understand each option, capability, or command in the apps we use it with.

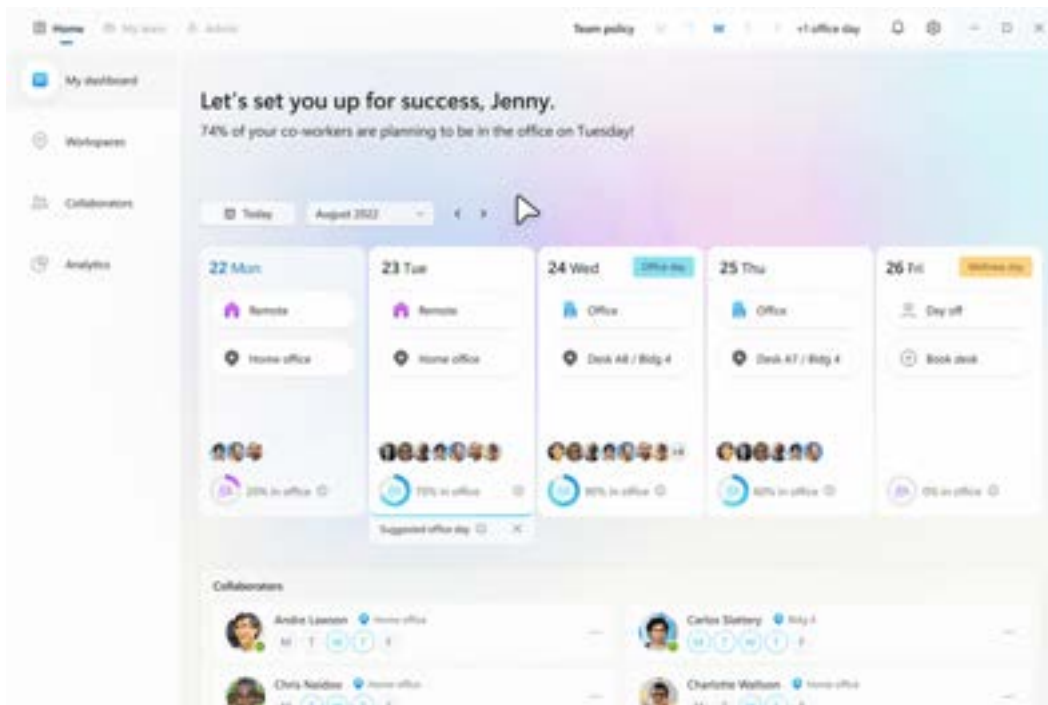
Some of the primary features it delivers are:

- Available throughout the employee experience: Copilot, as a part of Viva, integrates seamlessly with other Microsoft 365 services, such as Teams, SharePoint, OneDrive, and various Office Applications. This integration allows you to have in-context help and suggestions, enabling you to stay in the flow of your work.

- **Adaptive learning:** Microsoft Copilot utilizes AI to understand employees' learning needs based on their current tasks and past activities within Microsoft 365. This personalized approach ensures you receive relevant tips, guides, and resources.
- **Task-oriented assistance:** Microsoft Copilot uses a sophisticated understanding of your task to offer step-by-step guidance and best practice suggestions, making it easier for employees to navigate complex tasks and enhance their skills.
- **Personalized and context-specific content:** Copilot can promote relevant learning materials and support resources employees need to complete tasks efficiently. With the capacity to target particular groups, such as new hires or remote workers, Copilot offers a more personalized support experience.
- **Integrated and extensible:** Copilot can securely pull resources and provide guidance across numerous systems and services within Microsoft's ecosystem, ensuring a truly integrated learning and support experience for employees.

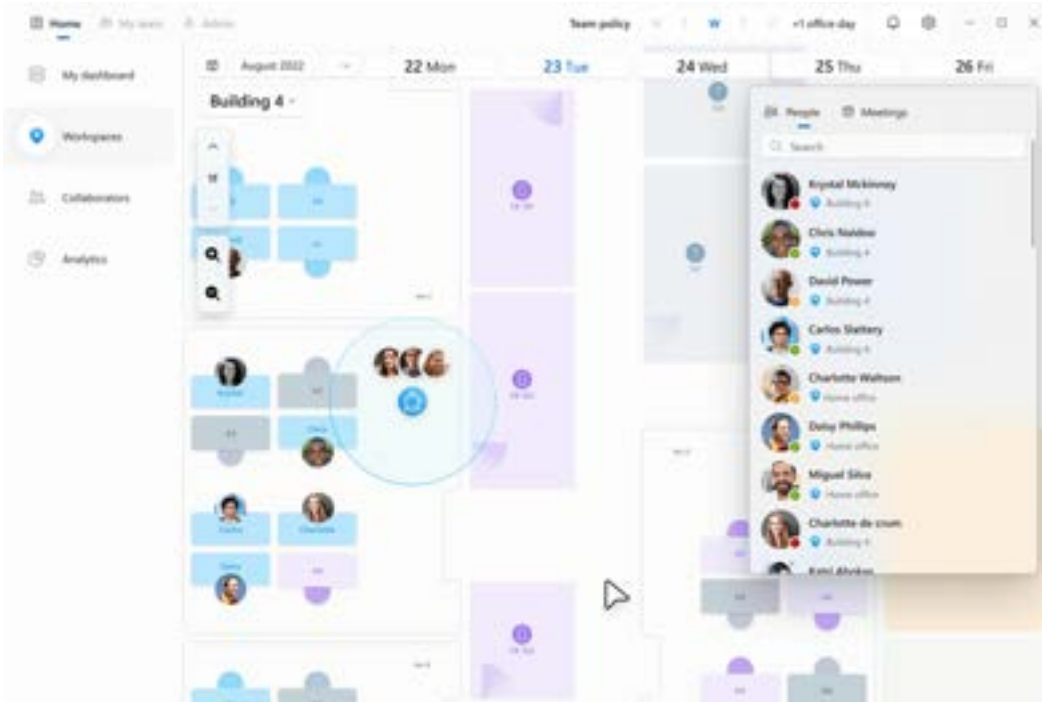
Microsoft Places

Microsoft Places is a new, innovative platform integrated within Microsoft 365, designed to facilitate and enhance hybrid and in-person work by intelligently coordinating and optimizing workspaces. It's like having an intelligent assistant that helps you manage your schedule, find your colleagues, and navigate your work efficiently.



Key features it offers include:

- **In-context workplace planning:** Integrated seamlessly with Microsoft 365 services such as Outlook and Teams, Microsoft Places uses common data signals to provide a view of the upcoming week, showing when colleagues plan to be in the office. This lets you align your schedule with the days of highest office attendance, maximizing opportunities for in-person collaboration.
- **Intelligent workspace discovery:** Microsoft Places uses innovative booking capabilities to help you find available spaces suitable for your meeting needs. This includes accommodating a mix of in-person and remote participants and recommending spaces with the necessary technology for your meetings.
- **Optimized commuting:** The platform offers recommendations for the shortest commute times, giving you prompts on when to leave based on current traffic conditions and your meeting schedule. This allows you to plan your workday more effectively.
- **Navigation and hot desk booking:** Through features such as wayfinding and hot desk booking, Microsoft Places enhances the in-office experience. You can access a map on your mobile device to guide you to your meeting location and see where your colleagues are seated, helping you choose your workspace accordingly.



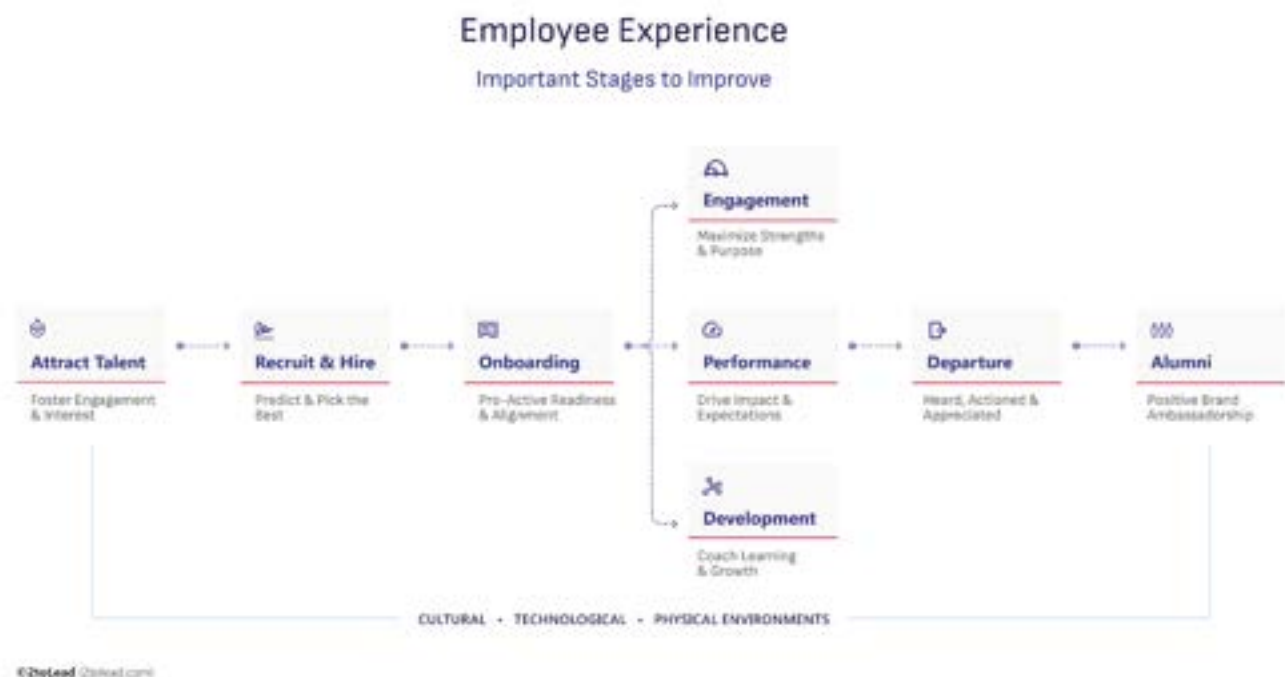
- **Insights for workspace planning:** Microsoft Places also helps managers understand office space usage patterns. It can guide decisions on future space requirements by highlighting how spaces are used. It also provides sentiment-related insights on hybrid policies to assist managers in organizing their remote teams.

Please note that at the time of writing, Microsoft Places is not yet released and is expected to launch soon in beta.

Understanding Each Stage of the Employee Experience

Most methodologies frame the cycle needing to represent 7 stages of recruitment, onboarding, engagement, performance, development, and departure. While all are important, two areas many orgs underestimate how much they can influence are the pre-recruitment and post-departure phases of an employee's journey.

We see it as an 8-stage journey based on the importance of those additional or extended stages.



Focusing on the employee experience can feel like a daunting task when reviewing the many different stages. This blog will help you understand how the different stages impact employee-related business outcomes and how to gain competitive advantages if actioned.

However, suppose you aren't too familiar with employee experience as a concept. In that case, we strongly suggest you read our blog that answers, ["What is the employee experience, and why does it matter?"](#)

Still with us? Excellent! Let's dive in.

The following are the 8 stages we will be reviewing. Understanding and improving these stages can lead to a positive employee experience, from beginning to post-departure.

- Stage 1 - Pre-recruitment or attract
- Stage 2 - Recruitment or hiring
- Stage 3 - Onboarding
- Stage 4 - Engagement
- Stage 5 - Performance
- Stage 6 - Development
- Stage 7 - Departure
- Stage 8 - Post Departure or Alumni

Stage 1 - Pre-recruitment or attract

This stage in the employee experience is often underestimated, or not enough time and effort is spent. If EX is tackled well, there will be significant benefits to the pre-recruitment or attracting step in an employee's journey. Still, if we forget to engage here, it can lead to missing out on some of the best talents the industry has to offer.

Employees who are satisfied with their organization's flexibility are [2.6x more likely](#) to be happy working for their employer and are [2.1x more likely](#) to recommend working for their employer.

For many companies, when you think of your brand, you think of how it relates to attracting more customers or increasing customer loyalty. In this same way, we need to consider how our brand, purpose, and culture should attract more employees and increase employee loyalty. Workplaces today are highly transparent, especially as it relates to what the employee experience is like within your organization. Internal employee experiences can significantly impact your organization's external reputation and the signals for what your organization stands for make highly valuable talent interested.

Stage 2 - Recruitment or hiring

In the recruitment step, the second employee experience stage, it is essential to have an excellent EX that aligns with your cultural environment.

Every hiring process should be clear, engaging, and fair for the new hire. As a result, we need to ensure that the employee experience is supported by transparency, streamlined processes,

high manager and peer engagement, and uses objective evaluations that help predict fair expectations and optimal performance and balance out manager bias.

It's important to have employee experiences that improve the recruitment process for prospective employees who haven't been selected or identified yet. This is because while **on average, top candidates are only on the job market for 10 days it takes an average of 42 days to fill a position**. The more we can improve the employee experience for candidates, the greater our chances of keeping the best ones.

Stage 3 - Onboarding

If a train is stopped, it is very easy to get on. However, jumping on a moving train can prove, well, difficult. The same scenario, minus the bumps and bruises, can be applied to organizations. Very few employees typically agree that their organization does a great job of onboarding and the reason is because moving trains are hard to board.

Successful employee experience-centric onboardings need to start before the first day of employment. At the same time, onboarding shouldn't end in the first week either. Every onboarding process should engage the employee and not focus on one-way communication.

This engaged onboarding should be evident in the employee experience, whether it be helping employees socialize with their team, understanding how the organization functions, or learning its purpose and where their team and contributions fit in.

Stage 4 - Engagement

Engagement is how we sustain a vital connection between the employee and their workplace. Employee engagement is about more than making sure employees are satisfied with where they work. Instead, it's about ensuring they have the right conditions to give their best each day, are committed to the organization's goals and values and are motivated to contribute to its success.

This is based on a two-way commitment between the organization and the employee and can often be measured based on employee experience. **58% of employees wish their employer would conduct employee engagement surveys**.

When supporting this step of the employee experience, it is important not to emphasize perks over relationships. A manager who is engaged in coaching, keeping the organization

accountable, and focusing on the individual's potential and growth all matter far more than workplace perks or programs will.

So, our employee experience investments here have to foster the right outcomes as there are big mistakes companies can make here. The manipulation of an employees' commitments or emotions should be avoided at all costs, as it can lead to employees becoming cynical or disillusioned, leading to poor business performance.

Take a look at this video on how employee engagement has evolved [and staying connected in a hybrid](#) world to make sure your approach this stage responsibly.

Stage 5 - Performance

Only **[1 out of 5 employees](#) believes they can meet their career goals where they work today**; and have both their manager and organization's support to pursue those goals – even in another part of the business. This is about more than just an annual performance evaluation. Performance evaluation is a core part of the employee experience. It is optimal when done more regularly (at least quarterly), combined and based on informal feedback (for a complete picture), and includes significant praise and recognition. This should be driven by peers and managers.

It should be reflective of individual achievement and a comprehensive review that incorporates impact on others, the impact others have had on them, whether that be team collaboration, organizational impact, or a measure of customer and partner value.

Stage 6 - Development

When considering an organization as a potential place of employment, **[81% of employees](#) say it is important to them that an organization offers training programs to help keep their skills up to date**. It is easy to think of this step of employee experience being represented by the training offered by an organization. However, improving outcomes in this step of the employee experience require us to think of development more comprehensively.

Employees need to be engaged (a parallel step mentioned earlier), and they need to be able to see a path of growth in the organization. That growth might include job title changes, pay raises, new skills, doing less of what they don't like, working with new people, having more autonomy, and/or more support.

This is often heavily supported through ongoing coaching conversations and led by peers, managers, and business leaders. These ongoing coaching opportunities may take the form of short discussions measured in minutes to deeper and more structured feedback from peers, managers, or self-reviews.

Make sure your on top of [corporate communication by understanding how its changed](#), in our video below.

Stage 7 - Departure

This stage can be one of the most impactful events in the employee experience. More so, arguably, than any other for the employee. The departure is a great opportunity to have an exiting employee help us understand what the employee experience has been like, how it could be improved, and their perceptions of the organization. It is a very real challenge that organizations must address today as **40% of employees stated that they are at least somewhat likely to leave their current job in the next 3-6 months.**

Every exit program always works to meet the needs of an employee being heard, their feedback being actioned, being appreciated for the work they have done, and being seen for the potential they possess. The last item of potential importance, as it leads to a stronger post departure or alumni stage, is ensuring that even if it didn't feel like it was the right fit for either side, the engagement ends on the right foot.

This process can potentially lead to better chances of re-recruitment or positively supporting future recruitment efforts.

Stage 8 - Post Departure or Alumni

Each departed employee should be seen as a brand ambassador. They either bolster, harm, or are neutral to your organization's reputation. Engaged alumni further increase brand sentiment and can often act as highly effective brand advocates (**far more so than an average customer – with some predictions evaluating their worth as at least 5X more**).

Investing in a departed employee's experience is a great way to increase the long term likelihood of them returning or helping positively influence your recruitment efforts to find top talents that align with your organization's culture, purpose, and brand.

As your cultural environment, technology environment, or the physical work environment changes, finding ways to inform these alumni can be extremely valuable. An employee may depart due to one or more of those environments not meeting their needs.

How Microsoft 365 and Microsoft Viva Impacts Each Stage

Now that we understand the 8 stages of the Employee Experience, how might Microsoft 365 and Microsoft Viva technologies impact each of these stages?

Stage 1 - Pre-recruitment or attract with Microsoft 365 and Microsoft Viva

Gen Z and millennials are digital natives who care about the digital experience. To further attract Gen Z and millennials, organizations must rapidly improve their digital employee experience and accelerate digital adoption.

The internal employee experience should be as transparent as possible for non-employees to understand. Consumerization has gripped the virtual economy through digital experiences, and organizations need to ensure a similar experience in the enterprise world. In the enterprise world, leveraging the latest modern technology is a key cornerstone to bringing in a consumerized (or consumer-inspired) experience to the workplace.

We know that highly satisfied, engaged, and connected employees will actively advocate, promote and support finding and introducing talent leading to an employee-led pipeline for new potential hires.

The Microsoft 365 Advantage

If you are maximizing a Microsoft 365 employee experience today, then you can easily share insight into what your digital employee experience looks like with prospective employees before they begin the application or recruitment process. Microsoft 365 enables an unparalleled hybrid and remote work experience, a differentiator for many looking for opportunities in today's post-pandemic marketplace.

Collaborate & Engage At Scale

Microsoft 365 provides world-leading external business-to-business as well as business-to-consumer collaboration experiences. They make it easier to take advantage of the growing independent group of talent, gig economy, and crowdsourcing trends that are changing the shape of the future of work today. All while enabling secure and compliant approach that

ensure this is done responsibly without risking competitive advantage, business data, and more.

Stage 1

Pre-recruitment with Microsoft 365 & Microsoft Viva

Top Takeaways



01 / New High Standards

Gen Z and millennials are digital natives who care about the digital experience. To further attract Gen Z and millennials, **organizations must rapidly improve their digital employee experience** and accelerate digital adoption. Finding the right combination of **Microsoft 365 and Microsoft Viva** applications can dramatically improve EX across all stages.



02 / Transparency Is Key

The **internal employee experience should be as transparent as possible for non-employees to understand**. Consumerization has gripped the virtual economy through digital experiences, and organizations need to ensure a similar experience in the enterprise world. **Microsoft 365 and Microsoft Viva** make it easier than ever to stay transparent, when desired, across the digital workplace.



03 / Investing in EX Leads to New Hires

Highly satisfied, engaged, and connected employees will actively advocate, promote and support finding and introducing talent leading to an **employee-led pipeline for new potential hires**. Leverage solutions like **Yammer and Viva Engage** to build strong communities that enable EX.

Consider This



50%
of leaders say their company already requires or plans to require, full-time in-person work in the year ahead.

SOURCE: Microsoft

Make sure that whatever direction your company is headed, stay transparent from day one. This will allow you to avoid any candidates that don't fit the new or traditional road ahead.

Creating a Q&A site that answers common questions about the employee experience can set applicants up for a greater understanding and your organization apart from others.



62%
of all frontline workers say leadership does not prioritize building culture.

SOURCE: Microsoft

Right the wrongs of the past by building a sense of culture from the start and following through during the various EX stages.

Building pre-recruitment SharePoint sites can highlight the best parts of your organization now, and where you're headed.

Stage 2 - Recruitment or hiring with Microsoft 365 and Microsoft Viva

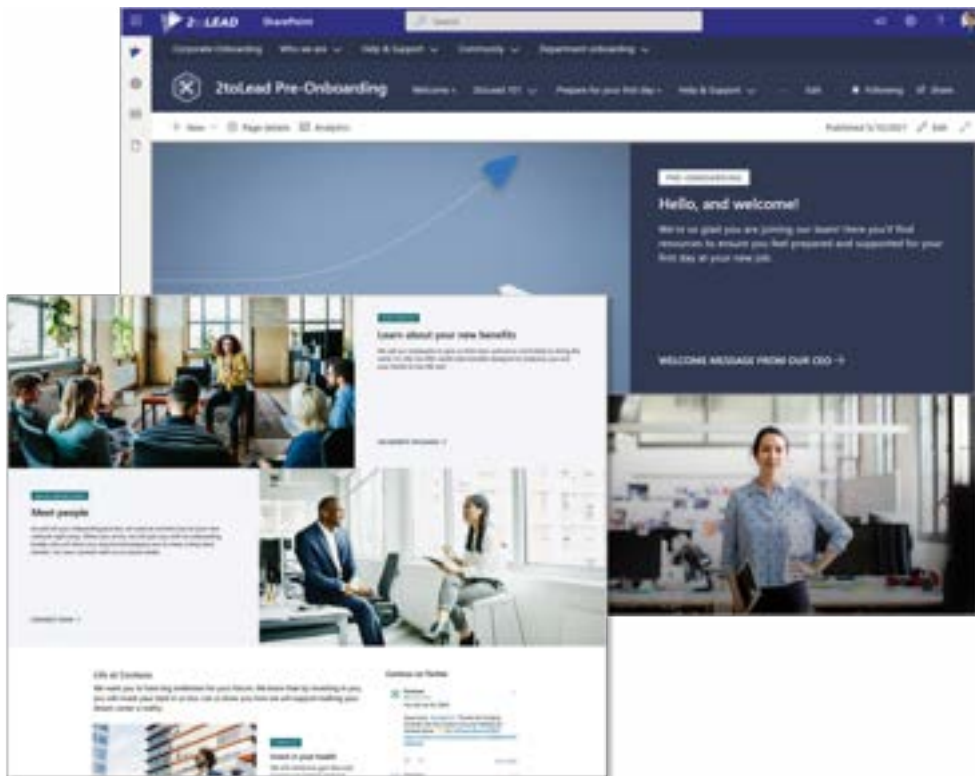
The employee experience for application, recruitment, and hiring processes all benefit from digital and technological improvements that Microsoft 365 can provide. From automating and streamlining processes that help accelerate the hiring and evaluation process to providing experiences for employees during the interview cycle, there is much you can do to get started here.

Pre-onboarding or Pre-boarding Experiences

Use a SharePoint, Teams, and/or Yammer Pre-onboarding space to welcome prospective (booked for interviews) or new employees (who don't have accounts yet) much earlier. This includes people who may not have made it to the final selection but may be great candidates for other roles or in the future.

By having a digital pre-employee experience like this we are both signalling the excellence in the organization while providing an effective way to connect further and inform potential hires. This could have frequently asked questions to cut down on HR requests during the interview cycles, inspire interest and excitement around what differentiates the organization, or share insight on what to expect when they work at the organization, for a department, or even in a patterned role. By customizing pre-populated site content and pages, you can fit your organization's needs while also providing an experience that allows them to log in securely with their consumer identity.

To get started you can even use this [Microsoft Employee Pre-Onboarding Site](#) template.



Using the pre-boarding site, share insight about why your organization is a great place to work for prospects while familiarizing them with what to expect as an employee. Enable new employees who haven't even received their credentials to begin exploring more about the organization and what the onboarding experience will be like before they transition into the corporate/org-wide or departmental onboarding experiences that follow.

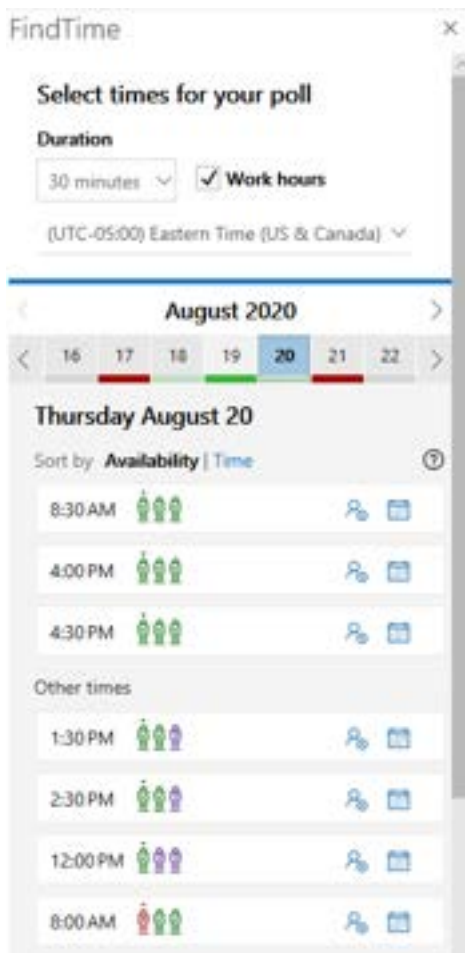
Leverage SharePoint's rich capabilities to share resources securely, onboard and offboard users, and control information access. External guest access can be used for providing pre-start hires, with no corporate credentials, access to the Pre-onboarding site only.

Streamline The Interview Process

During interviews with potential candidates, a process that doesn't just enable great online meetings like Microsoft Teams but also automatically enables subtitles via live captions, transcripts, and intelligent recordings greatly minimize the effort for each interviewer. This helps understand what questions and insights have been gained from prior interviews leading to a much better candidate and interviewer experience today.



Even before many interviews start, the scheduling process greatly benefits from features like advanced scheduling support, like find time features that automatically suggest the best dates/times. When that doesn't work, you can always use meeting polls that automatically integrate with employee calendars.



Stage 2

Recruitment or hiring with Microsoft 365 & Microsoft Viva

Top Takeaways



01 / Build Pre-onboarding or Pre-boarding Experiences

Use a **SharePoint, Teams, and/or Yammer** Pre-onboarding space to welcome prospective (booked for interviews) or new employees (who don't have accounts yet) much earlier. This includes people who may not have made it to the final selection but may be great candidates for other roles or in the future.



02 / Streamline the Interview Process

During interviews with potential candidates, a process that doesn't just enable great online meetings like **Microsoft Teams** but also automatically enables subtitles via live captions, transcripts, and intelligent recordings greatly minimizes the effort for each interviewer. Focus on the interview, and let Microsoft Teams take care of the rest.



03 / Don't Worry, Your Information Is Safe

It can be worrisome to wonder if you've opened up your organization to malware. Leveraging **SharePoint's** rich capabilities to share resources securely, onboard and offboard users, and control information access is the reassurance you need. Also, External guest access can be used for providing pre-start hires, with no corporate credentials, access to the Pre-onboarding site only.

Consider This



53%

of employees are more likely to prioritize health and well-being over work than before the pandemic.

SOURCE: Microsoft

Ensure employee happiness is highlighted during the onboarding phase to start the relationship off on the right foot.



54%

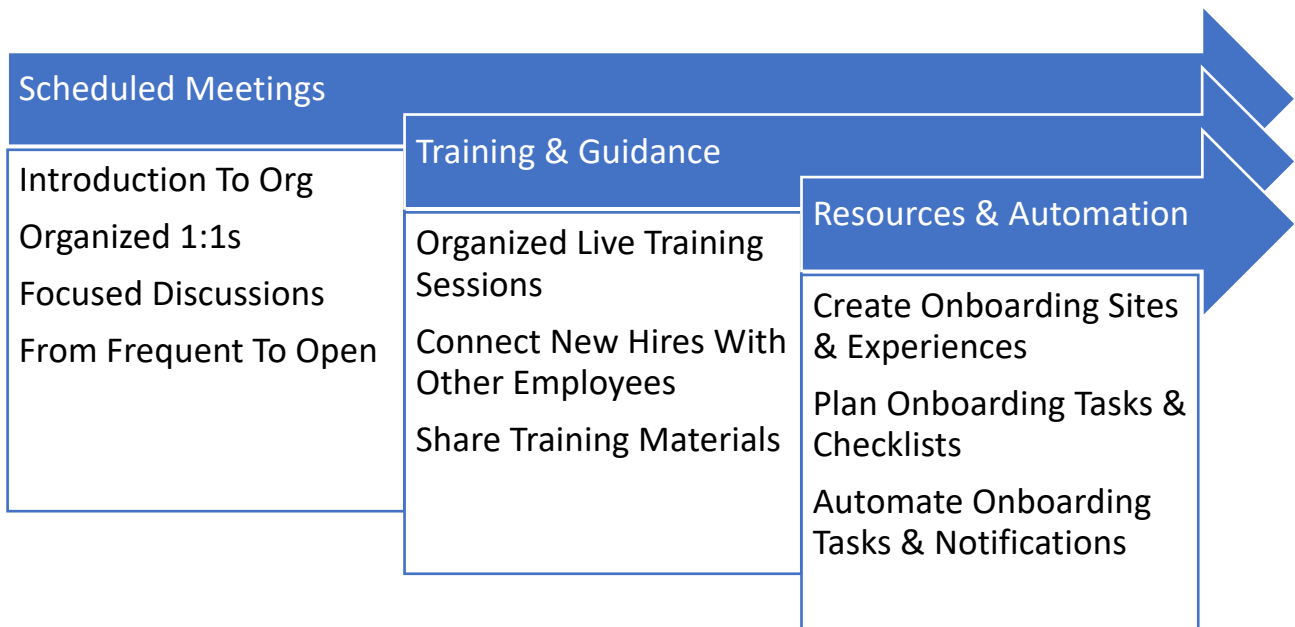
of leaders fear productivity has been negatively impacted since the shift to remote or hybrid.

SOURCE: Microsoft

Calm the fears of leaders and start the employee journey with tools and experiences that enable productivity remotely. Microsoft 365 and Microsoft Viva have various solutions and experiences that can help.

Stage 3 – Onboarding with Microsoft 365 and Microsoft Viva

The onboarding process's lack of structure and planning can be a big challenge. Spending time here is important to improve, automate or simplify the process and prioritize the right steps. Consider the core tasks in virtual onboarding and how Microsoft 365 correlates to each of them.



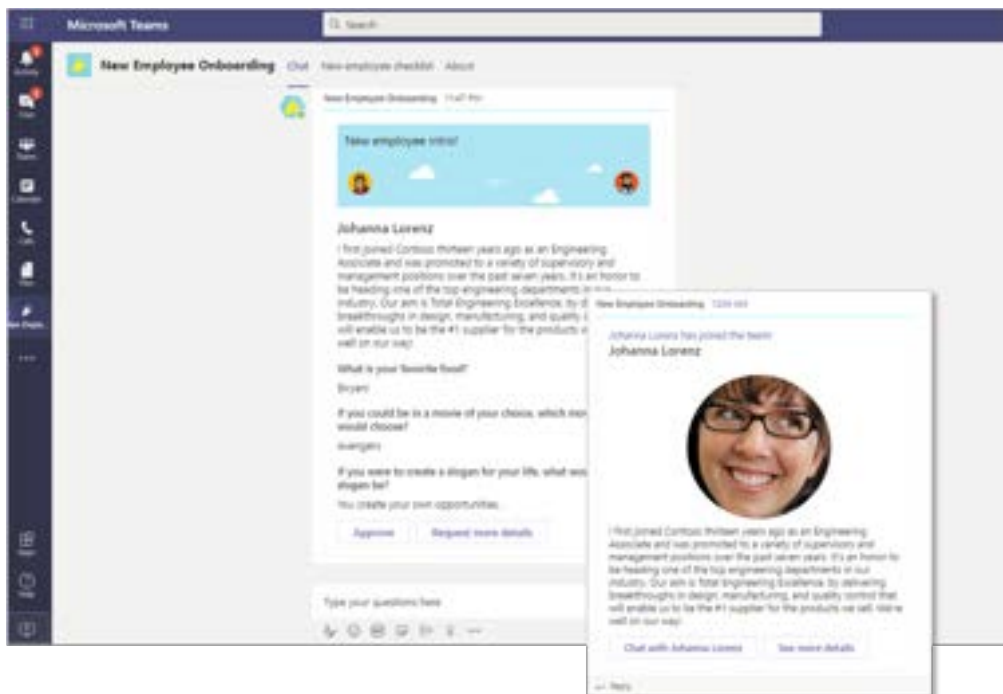
Emails may be one way to introduce an employee to the org, but Yammer communities, Viva Engage, Teams channel messages, bots and more can enrich introductions. Integration with many services like LinkedIn make it easy to understand who might already know the new employee and the comprehensive people card experiences, people search, Viva Topics and other related experiences make it easy for an employee to connect with or understand who's who within the org. Even sharing materials, planning and attending training sessions with Viva Learning, Microsoft Teams, SharePoint and more is made richer due to how each of those experiences can personalize themselves based on how the employee prefers to work and learn.

New Employee Onboarding Assistance, Icebreaking & Badging

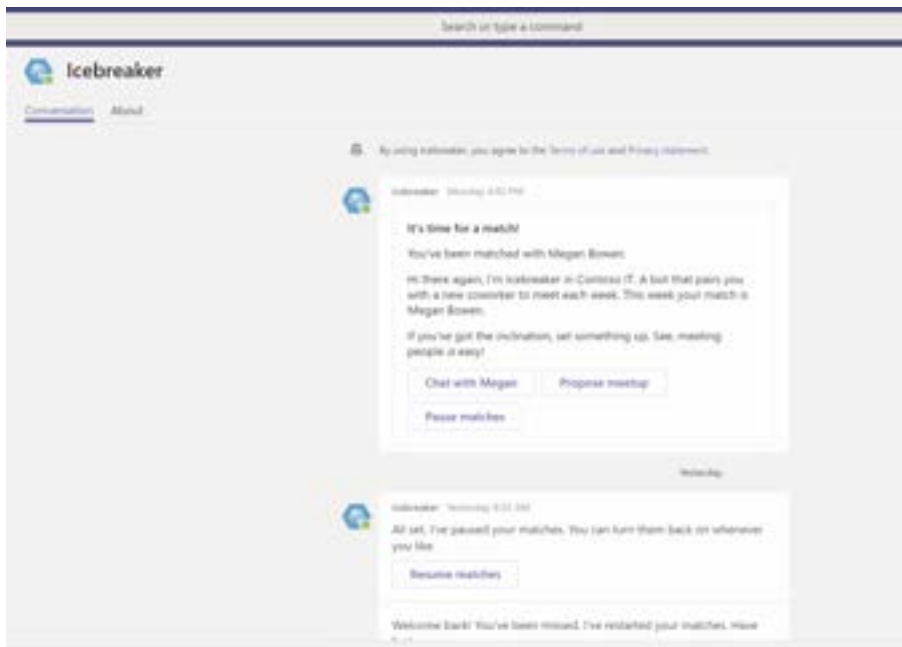
Sometimes clever solutions can go a long way in improving the employee experience further as it relates to onboarding. One challenge with new employees is that it can be hard to connect with others, especially if the mode of work preference is mostly remote or hybrid. Even before

the pandemic, **42% of IWs rarely meet new people at their company**; when they do meet new people, it's most often through a formal or informal company event. Managers rarely make those connections. So, we need to create employee experiences that further connect new employees.

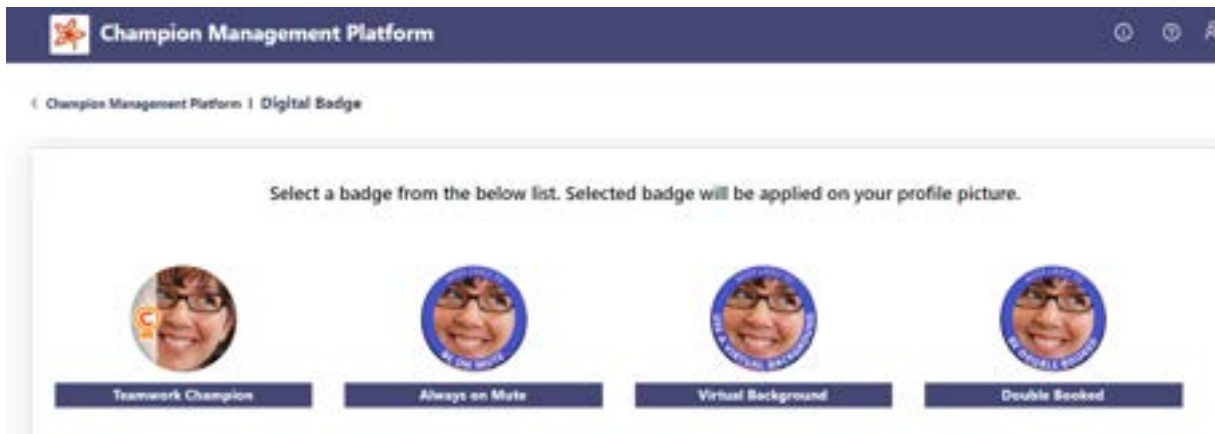
Consider automating the introduction or icebreaking of a new employee. If you are looking for an example you can build on, feel free to download and install this integrated [bot onboarding assistant](#) for Microsoft Teams.



Or consider pairing team members up for a meet up every week and let the bot help find an available timeslot for both parties with something like this [Icebreaker Teams app experience](#) that you can install and begin leveraging as a starting point.



Another effective technique is to badge the profile image of new employees so that everyone who sees them in email, in meetings, in communities, on Teams, and throughout the Microsoft 365 experiences can see at a glance that this is a new employee. This leads to people providing more proactive support in onboarding, connecting further to improve the new employees network, and much more. You can do this by leveraging the underlying capabilities of this [champion management platform solution](#) or by developing it yourself.



New Employee Onboarding Targeting, Sites, Teams & Communities

Optimally throughout your employee experience in the context of users' work you will target information to new employees. You can do this by starting with audience targeting against a

new employee group, or more optimally a new employee group for a specific department. There are many out-of-the-box aspects of the employee experience that Microsoft 365 has built-in audience targeting support:



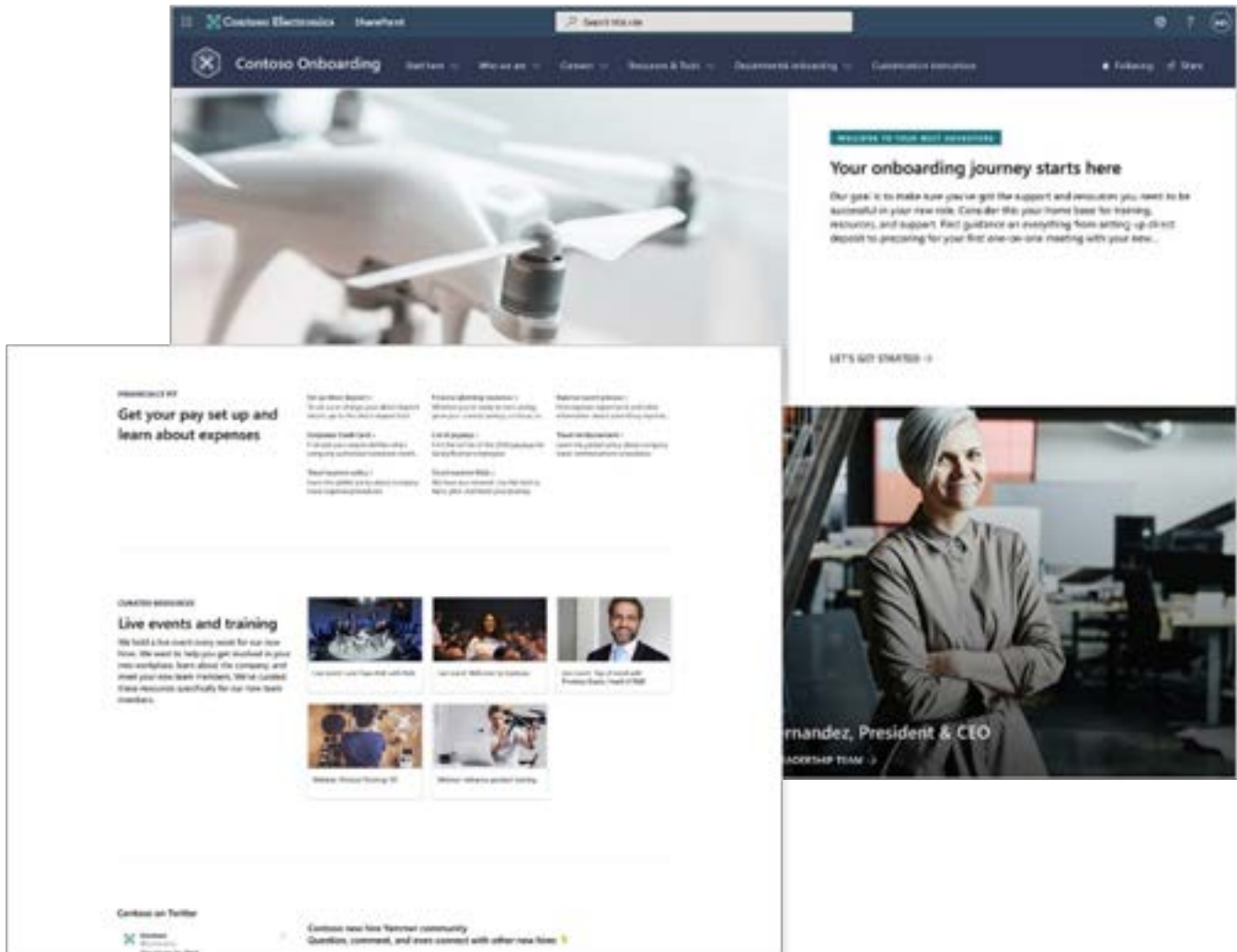
For example, you could organize news with a special news item that shows up first for new employees, or the navigation you use should have some 'getting started' links and material for new employees.

That doesn't have to be the only way you help new employees. This new employee content such as checklists, insights into the departmental culture or how the department works, and much more, could be empowered by creating corporate onboarding sites, departmental onboarding sites, and other targeted onboarding experiences.

Microsoft has created great samples for these new employee onboarding sites, such as the [New Employee Corporate Onboarding Site](#) and the [New Employee Departmental Onboarding Site](#).

New Employee Corporate Onboarding Site

Streamline and refine your new employee onboarding process by creating a new employee experience that connects new hires to resources, people, culture, and access to a new hire onboarding checklist. These sites include pre-populated content and pages that can be customized for your onboarding processes.



The corporate onboarding site is the landing place for the new employee onboarding experience. It provides a high-level view of organizational goals, leadership, team structure, and resources. In this phase, users seek guidance, support, and clarity.

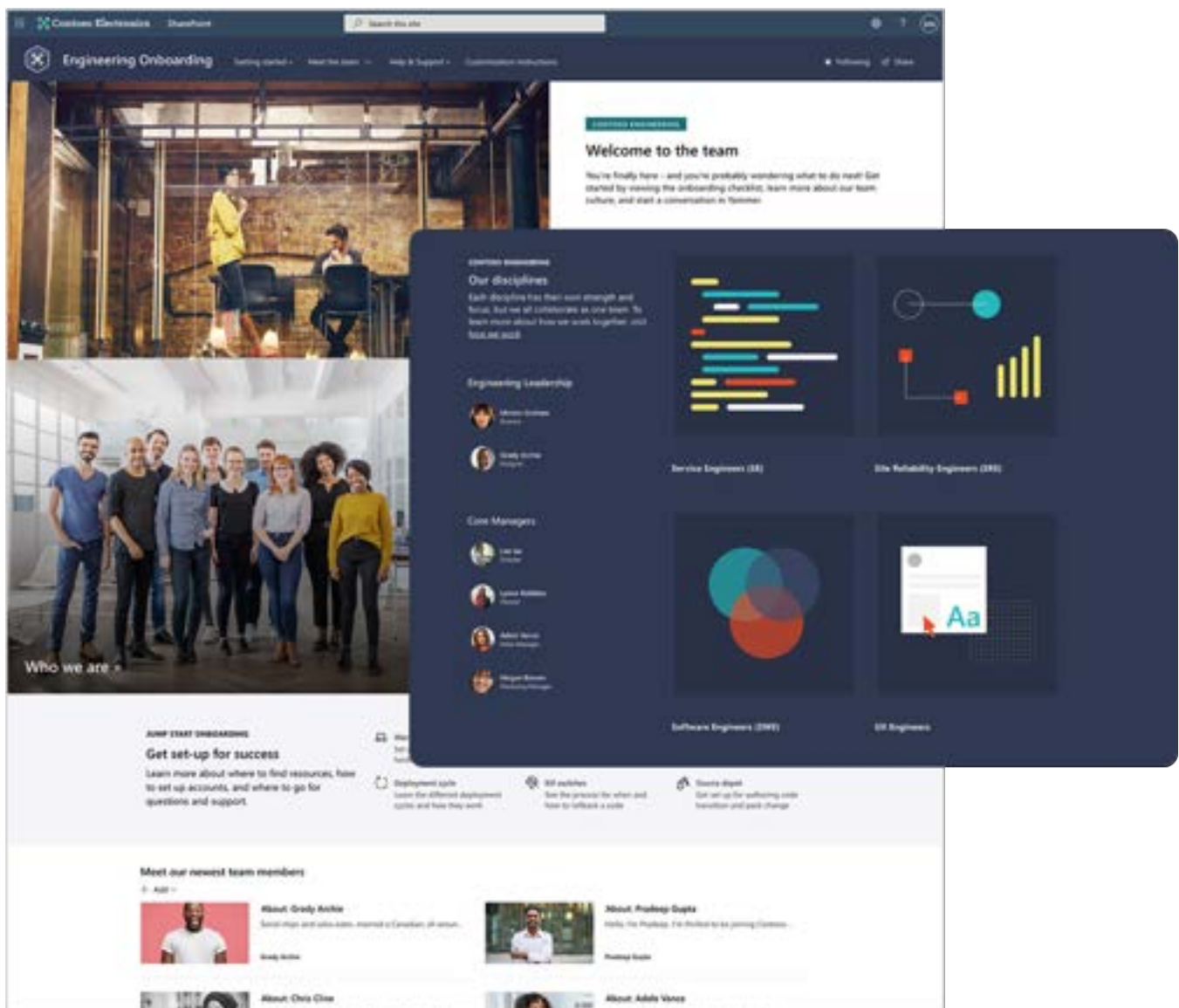
Use this site to outline onboarding details and expectations during the first months of onboarding.

Ensure users have access to support channels like Yammer, write FAQs relevant to your organization, and customize the onboarding checklist to include the activities you want all new hires to do in their first 30, 60, and 90 days.

New Employee Departmental Onboarding Site

Set new hires up for success by connecting them to their division or region teams. Share departmental announcements and news, welcome new hires, and build community and culture

among workgroups by customizing the Department onboarding site to fit your organization's needs.



Here, users need to learn about departmental leadership, culture, goals, and resources. Use the departmental onboarding site to provide access to communication channels, training guides, and events relevant to new hires. Consider associating departmental onboarding sites with existing department portals if you have them.

Pre-populated content:

- Home page - Provide a high-level view of significant concepts relevant to new hires.

- Getting started – Help users quickly understand onboarding tasks, departmental procedures, and anything else that will help new hires be successful.
- Meet the team – Introduce new hires to people, the organization structure and goals on the Leadership, The organization, and Our priorities pages. Edit the Call-to-Action web part to include links and images. Or, link to an existing team page instead.
- Help & support - Highlight where to go for support and consider creating a FAQ section.



Stage 3

Onboarding with Microsoft 365 & Microsoft Viva

Top Takeaways



01 / Create Personalized Onboarding Experiences

Emails may be one way to introduce an employee to the org, but Yammer communities, Viva Engage, Teams channel messages, bots and more can enrich introductions. Integration with many services like LinkedIn makes it easy to understand who might already know the new employee and the comprehensive people card experiences, people search, Viva Topics and other related experiences make it easy for an employee to connect with or understand who's who within the org.



02 / Make It Easy for New Employees to Break the Ice

One challenge with new employees is that it can be hard to connect with others, especially if the mode of work preference is primarily remote or hybrid. Even before the pandemic, **42% of IWs rarely meet new people at their company**; when they do meet new people, it's most often through a formal or informal company event. Managers rarely make those connections. So, we need to create employee experiences that further connect new employees.



03 / Introduce Them to the Company but Don't Forget their Team

Create new employee departmental onboarding sites to set new hires up for success by connecting them to their division or region teams. Share departmental announcements and news, welcome new hires, and build community and culture among workgroups by customizing the Department onboarding site to fit your organization's needs.

Consider This



60%
of people say they feel less connected to their teams.

SOURCE: Microsoft
That is why it is so important to incorporate team elements like org structure and employee profiles in the onboarding experiences.



20%
of new hires' reliance on their managers for onboarding support increased compared to before the pandemic

SOURCE: Microsoft
Hybrid and Remote work create an even greater need for curated general EX and onboarding experiences. Luckily, Microsoft 365 and Microsoft Viva are primed to help, and with a variety of solutions, select the approach that fits your organization and culture.

Stage 4 – Engagement with Microsoft 365 and Microsoft Viva

Employee engagement is now critical to business success. The 2021 Work Trend Index data revealed that 41 percent of employees were considering leaving their current employer. Today there is no more apt stage of the employee experience journey than the stage of engagement, where Microsoft 365 has more purpose-built digital experiences.

- Today employees can connect with others and share their voice with Microsoft Viva Engage and Yammer in communities or in individual or leader storylines.
- Live events, virtual conferences with Altspace VR, mixed reality events with Microsoft Mesh for Microsoft Teams, and many other experiences can improve where, how and when we drive engagement together.
- Employees can engage with company announcements, news, and insights in SharePoint and Viva Connections-powered Intranet experiences, whether it be just sharing a reaction, comment, or sharing information.
- Employees can understand engagement patterns, challenges, risks, and more with Microsoft Viva Insights while enabling them to action these insights with a platform that has the breadth and depth needed to adjust the employee experience, nudge behaviors and improve outcomes.
- Microsoft Viva Topic pages don't just help users find experts and resources but can help find experts identified by engagement in Yammer discussions, such as those related to questions and answers.
- With Q&A in Teams webinars, live events, and Teams meetings or Viva Engage and Yammer experiences to provide a place to run AMAs, we have more ways to share our questions and answer than ever before. In fact, when employees have a question or need support, Microsoft 365 can provide new ways to meet those needs, from simple Q&As in Yammer to advanced and integrated experiences that leverage Dynamics 365 and Power Platform, such as the one represented by [Microsoft's own "AskHR."](#)

AskHR case management lifecycle



Viva Engage Communities & Storylines

For many organizations, the Intranet has continued to evolve and transform. We believe we are in the midst of another major transformation of the Intranet, and the impact of Microsoft Teams, Microsoft Viva, and more is important to understand. If today is indeed near the birth of Intranets 3.0, then a big driver beyond AI improvements and where people work (Microsoft Teams) is the considerable progress in digital employee engagement.



Viva Engage represents this new form of employee engagement pretty well today as it is an improvement on an old communities employee experience with Microsoft 365 that further enriches it and connects people across the company, wherever and whenever they work so that everyone is included and engaged. The Viva Engage app in Teams helps organizations build communities powered by Yammer. Still, it also allows employees to spark engagement with leadership, harness knowledge and answers, and build personal networks.

It's not just that we can use and create Viva Engage to share stories, but that these are more engaging, to begin with since they are often highly visual with photos, images, or video content all accessible from the places we already work in such as Microsoft Teams and the employee Intranet (via Viva Connections).



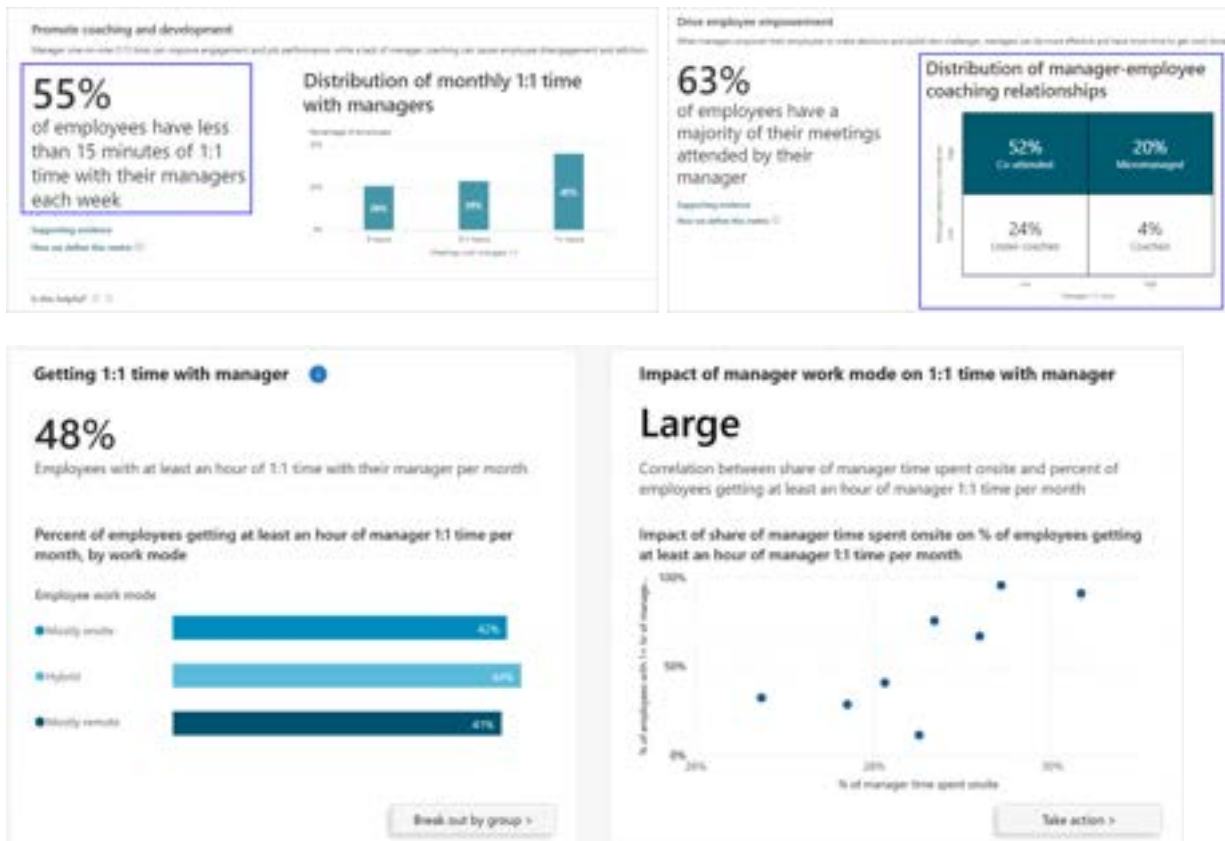
Keep in mind that the Viva Connections feed features relevant content from Viva Engage, including announcements, mentions (@ mentions), and storyline posts from people you follow. This can help bring deeper engagement to the same feed that powers news today.

Employee engagement must certainly move beyond the Intranet as we look forward and Microsoft 365 gives us many tools and ways to further our journeys today.

Viva Insights & Glint

Microsoft Viva Insights and Glint blend AI technology and people science to power predictive insights that help human resources, leaders, and managers quickly make sense of engagement data, connect insight with outcomes, and take meaningful action.

As an example, are employees routinely getting one-on-one time with their managers? You can get these kinds of insights from Viva Insights and refine them by comparing them against different departments, business units or work modes (mostly remote, hybrid, and onsite). Moreover, it might be worth exploring the other side of manager time, such as how managers engage in employee meetings. Cultivating autonomy and development is essential for employee engagement. Empowering employees to make decisions and tackle new challenges enables managers to be more effective and reclaim time.



Employee Signals takes advantage of Glint’s modern and agile listening approach. Rolling out Glint across your organization allows you to provide more actionable insights to your managers to help your employees thrive. Glint and Microsoft 365 bring feedback directly into the flow of work, ensuring leaders and managers have an easy way to access employee engagement insights and respond to their team’s needs.



Stage 4

Employee Engagement with Microsoft 365 & Microsoft Viva

Top Takeaways



01 / Create Multiple Ways for Employees to Engage

Today employees can connect with others and share their voice with **Microsoft Viva Engage** and **Yammer** in communities or individual or leader storylines. They can also engage with company announcements, news, and insights in **SharePoint** and **Viva Connections**-powered Intranet experiences, whether it be just sharing a reaction, comment, or sharing information. Also, **Microsoft Viva Topic** pages don't just help users find experts and resources but can help find experts identified by engagement in Yammer discussions, such as those related to questions and answers. Of course, many more ways are included in the whitepaper, and you should choose what fits your organization best.



02 / Get Ahead of Where Engagement Is Heading

Viva Engage represents this new form of employee engagement pretty well today as it is an improvement on an old communities employee experience with Microsoft 365 that further enriches it and connects people across the company, wherever and whenever they work so that everyone is included and engaged. The **Viva Engage app in Teams** helps organizations build communities powered by Yammer.

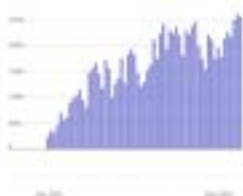


03 / Understand Your Employees with Greater Depth

Microsoft Viva Insights and **Glint** blend AI technology and people science to power predictive insights that help human resources, leaders, and managers quickly make sense of engagement data, connect insight with outcomes, and take meaningful action.

As an example, are employees routinely getting one-on-one time with their managers? You can get these kinds of insights from Viva Insights and refine them by comparing them against different departments, business units or work modes (mostly remote, hybrid, and onsite).

Consider This



252%
increase in weekly time
spent in meetings for the
average Teams user since
February 2020

SOURCE: Microsoft
Engagement doesn't mean meetings.
Look for alternative ways to engage
employees with Yammer, Viva
Engage, and more.



51%
of hybrid employees say
they're likely to go remote
in the year ahead.

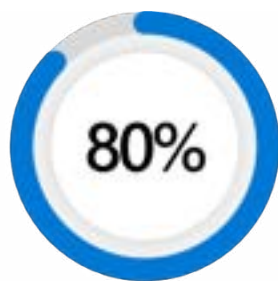
SOURCE: Microsoft
While organizations are getting more
restrictive when it comes to hybrid
and remote work, employee desire for
it is still trending up! Providing
employees with the environment that
fits their life best, is proven to lead to
a more engaged workforce.

Stage 5 – Performance with Microsoft 365 and Microsoft Viva

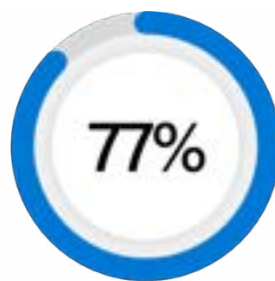
It is absolutely true the Microsoft 365 and Microsoft Viva provide new ways for employees to share praise and recognition from Microsoft Viva Engage storylines to praise in Viva Insights, Teams, and Yammer. Where performance is taken to the next level by employee experience is where the employee experience elevates performance and performance insights by enabling greater clarity, prioritization and alignment. Few things do that better today than Microsoft Viva Goals.

Connect Work To Outcomes & Elevate Team Performance

Ally.io, now Microsoft Viva Goals, has a rich history of creating higher-performing teams, stronger cultures, and faster business growth.



Say Ally.io helped create a
higher performing team



Say Ally.io helped create a
stronger culture



Say Ally.io led to faster
growth for the business

Taken from Ally's 2021 Goal Management Report reviewing over 4,500 knowledge workers in North America and the UK. Read the full report [here](#).

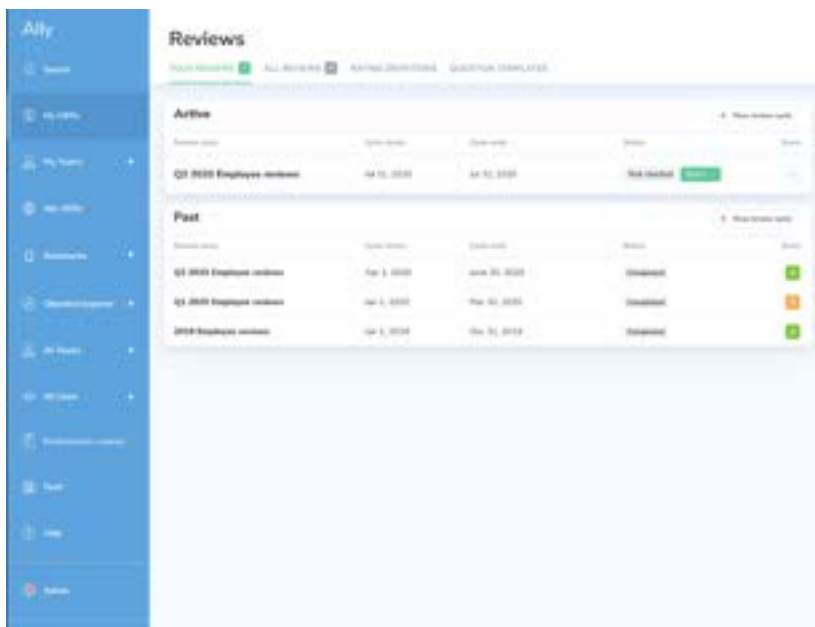
This is made possible by providing employees with rich goal management, objectives, and key results capabilities. This accelerates organizational alignment from 40% to 90% in less than one year. So how do Viva Goals align work to corporate objectives?

- Align at all levels of the organization with OKR approval workflows, Organizational, Team, and Individual goal pages, and Chart View.
- Connect work to outcomes with Projects and Tasks aligned to OKRs with automatic and built-in integration.
- Focus discussions, provide context, and simplify reporting with custom dashboards and OKRs that dynamically update.
- Share progress and insights across your organization with shareable links to dashboards and with pinned apps and resources in Teams.

This is important because all of this goal alignment capability and Viva Goals also bring to the table the ability to explore performance effectively for the individual and the entire team. It enables us to track a rich history, context, 1:1s, reviews, and feedback together in one place.



Did you know that Ally has performance review capabilities in addition to its OKR ones? For many organizations who may not have a robust system in place or wish to align their goal and performance management more closely, this can be a great benefit that is well worth exploring.



The screenshot shows the 'Ally Reviews' dashboard. It features a table with columns for 'Review cycle', 'Cycle start', 'Cycle end', 'Status', and 'Action'. The table lists several review cycles, including 'Q1 2020 Employee reviews', 'Q2 2020 Employee reviews', 'Q3 2020 Employee reviews', and 'Q4 2020 Employee reviews'. The status of each cycle is indicated by a colored dot (green for 'On track', yellow for 'At risk', and red for 'Off track').

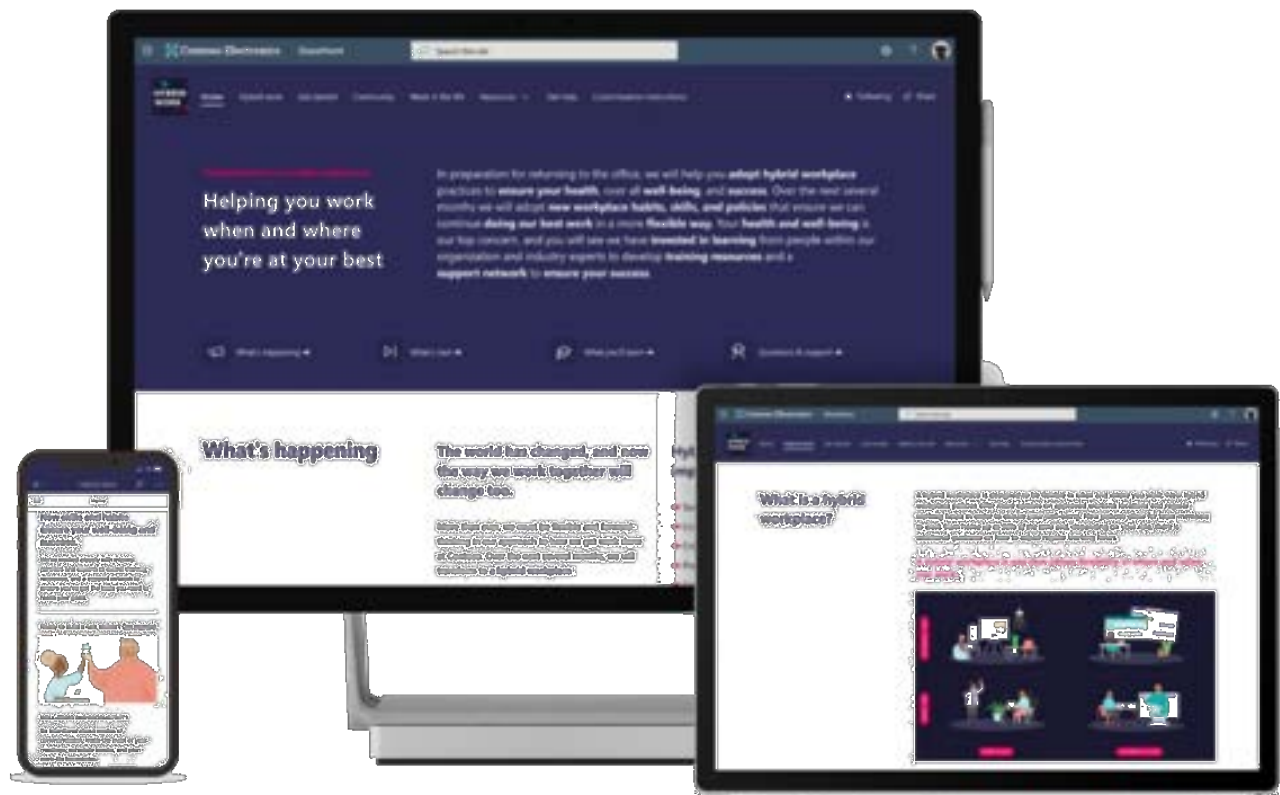
Review cycle	Cycle start	Cycle end	Status	Action
Q1 2020 Employee reviews	Jan 1, 2020	Mar 31, 2020	On track	View cycle
Q2 2020 Employee reviews	Apr 1, 2020	Jun 30, 2020	At risk	View cycle
Q3 2020 Employee reviews	Jul 1, 2020	Sep 30, 2020	Off track	View cycle
Q4 2020 Employee reviews	Oct 1, 2020	Dec 31, 2020	On track	View cycle

Pro-active Support For Continual Transformation

Help your organization implement and manage change initiatives such as new processes, systems, or mergers and acquisitions. Establish content centers that help your organization adopt key skills and habits and customize them to meet the needs of any organizational change management project.

In fact, you can get started on this with a simple workplace transformation site focused on hybrid work and how your organization is tackling this—providing insight into why, where, and how you are transforming the employee experience matters for existing employees and new ones. You could use this [Microsoft template](#) as a starting point.

This produces a sample site designed for helping an organization adopt hybrid workplace skills and habits using research insights from Microsoft’s Research lab and can be customized to meet the needs of any organizational change management project.



It contains the following:

- A custom home page using out-of-the-box web parts
- 11 customizable pages, related to hybrid work, using out-of-the-box web parts
- A custom illustrations throughout the sites and pages
- A hybrid work checklist in the form of a Microsoft List
- 2 news templates
- 4 news articles with example content
- A custom illustration of “A week in the hybrid workplace”

- Some hybrid workplace tips
- A pre-populated FAQ section
- A managers-only page with pre-populated quick tips for managing remote workers
- A champions page that helps recruit and engage new change champions
- A message from our CEO page that helps endorse change management projects
- Some provisioning and customization guidance



Stage 5

Increased Performance with Microsoft 365 & Microsoft Viva

Top Takeaways



01 / Leverage the Latest Technology to Dramatically Improve Performance

It is true that **Microsoft 365** and **Microsoft Viva** provide new ways for employees to share praise and recognition from **Microsoft Viva Engage** storylines to praise in **Viva Insights, Teams, and Yammer**. Where performance is taken to the next level by employee experience is where the employee experience elevates performance and performance insights by enabling greater clarity, prioritization, and alignment. Few things do that better today than **Microsoft Viva Goals**.



02 / Outcome-Driven Work

Provide employees with rich goal management, objectives, and key results capabilities. **This accelerates organizational alignment from 40% to 90%** in less than one year. **Viva Goals** aligns all levels of the organization with OKR approval workflows, Organizational, Team, and Individual goal pages, Chart View, and much more!



03 / A Successful Employee Experience Is One That Continuously Transforms

Microsoft 365 and **Microsoft Viva** help your organization implement and manage change initiatives such as new processes, systems, or mergers and acquisitions. Establish content centers that help your organization adopt key skills and habits and customize them to meet the needs of any organizational change management project.

Consider This



50%

of surveyed employees say they are more productive thanks to thriving relationships.

SOURCE: Microsoft
Fostering greater relationships, in and outside employee's direct teams is proven to drive better performance.



59%

of hybrid employees and 56% of remote employees have fewer work "friendships" since going hybrid or remote.

SOURCE: Microsoft
While employees are generally happier in hybrid and remote roles, the sense of disconnect is real. Investing in DEX with Microsoft 365 and Microsoft Viva can greatly help close those loneliness gaps.

Stage 6 – Development with Microsoft 365 and Microsoft Viva

Every employee wishes to develop and grow, and the employee experience needs to facilitate, foster, and engage with that development and growth. Microsoft 365 and Microsoft Viva provide a better employee experience that furthers employee development in several ways, from unlocking and enabling employee innovation with low code solutions like those represented in the Power Platform by providing nudges and recommendations as they work like those in Microsoft Viva Insights.

There are countless examples of how Microsoft 365 and Microsoft Viva enrich and enhance development, such as the obvious way. Microsoft Viva Learning directly plays to this need, so we have prepared two sample solutions or key investments below.

Connected, Collaborative Learning With Microsoft Viva Learning

What if learning didn't require multiple apps? Week-long training sessions or endless scrolling to discover and finish the necessary courses to unlock the career opportunities you want? What if all it took to discover learning content, share it with teammates, add to your library, and reserve time to pursue your learning goals was embedded in a tool you use every day?

That is what Microsoft Viva learning provides within Microsoft Teams today. A connected, customized experience for bringing learning into everyday tasks, processes, and tools. Implementing Viva Learning doesn't just mean having access to learning libraries you build and manage. It enables your organization to deploy partner integrations that promote a seamless experience to help employees focus on their work across their entire learning landscape.

Here are just a few of the partners whose solutions are integrated with Microsoft Viva Learning providing a highly connected employee learning experience that can further elevate your current employee experience.

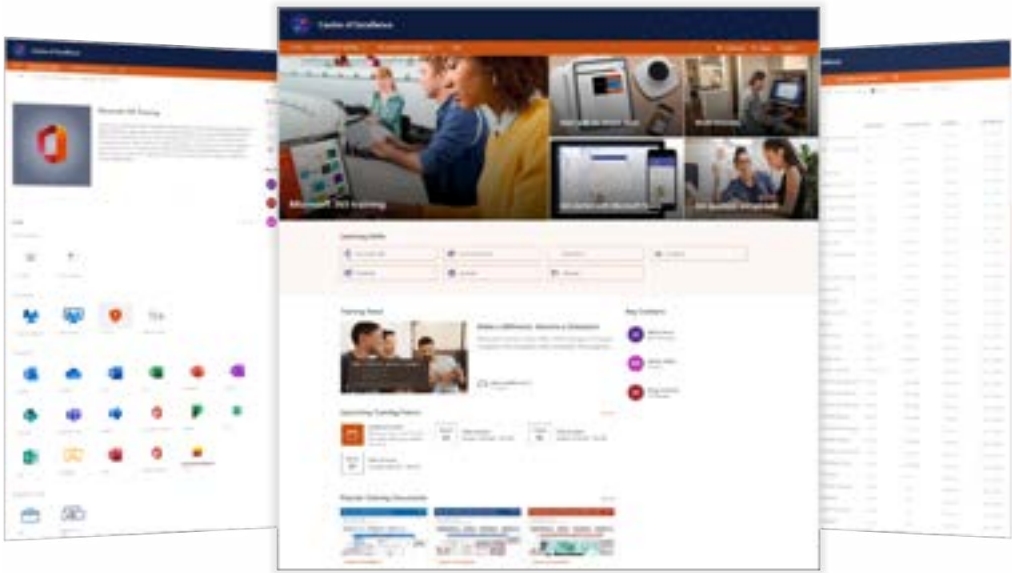
- Cornerstone OnDemand
- Coursera
- edX
- Go1
- Infosec

- Josh Bersin Academy
- Pluralsight
- Saba
- SAP SuccessFactors
- Skillsoft
- Udemy

Support Growth & Learning With Centers For Excellence

We can support many forms of excellence in our organizations, and there are many ways the employee experience serves to support this excellence. Still, none is clearer than where the digital employee experience supports digital excellence. Every organization is working hard to improve digital excellence. Having a center for digital excellence is a foundational solution that will work to reinforce and communicate governance, provide a hub for self-service learning, connect champions, mentors, and experts, and house tips, tricks, and considerable adoption material.

- Acting as a hub for digital excellence, this templated or customized site, yammer community, and connected teams experience serves as a place to store, share, monitor, and manage digital excellence within the organization.
- It can surface and connect users to learning programs, materials, and resources when combined with Viva Learning and other technology investments such as [Microsoft Learning Pathways](#).
- The Digital CoE is also a foundational investment for governance as it provides a precise location for sharing, storing, and enabling a richer understanding of your digital governance policies and guidance. Many house champion programs, lists, mentorship, Q&A-driven communities, and much more.





Stage 6

Development with Microsoft 365 & Microsoft Viva

Top Takeaways



01 / One Of, If Not the Best, For Employee Development

Every employee wishes to develop and grow, and the employee experience needs to facilitate, foster, and engage with that development and growth. **Microsoft 365 and Microsoft Viva** provide a better employee experience that furthers employee development in several ways, from unlocking and enabling employee innovation with low code solutions like those represented in the **Power Platform** by providing nudges and recommendations as they work like those in **Microsoft Viva Insights**.



02 / Learn to Prioritize and Optimize Learning

What if learning didn't require multiple apps? Week-long training sessions or endless scrolling to discover and finish the required courses to unlock the career opportunities you want? What if all it took to discover learning content, share it with teammates, add to your library, and reserve time to pursue your learning goals was embedded in a tool you use every day? That is what Microsoft Viva learning provides within Microsoft Teams today.



03 / Support Growth & Learning with Centers for Excellence

We can support many forms of excellence in our organizations, and there are many ways the employee experience serves to support this excellence. Still, none is clearer than where the digital employee experience supports digital excellence. Having a center for digital excellence is a foundational solution that will work to reinforce and communicate governance, provide a hub for self-service learning, connect champions, mentors, and experts, and house tips, tricks, and considerable adoption material.

Consider This



43%

of workers are somewhat or extremely likely to consider changing employers this year (vs. 41% in 2021). 52% of Gen Z and Millennials are somewhat or extremely likely to consider changing employers this year (vs. 49% in 2021).

SOURCE: Microsoft

Worried your employees are considering the same? Working on employee development will ensure your employees feel valued and help prevent departures.



74%

of people managers wish they could do more to implement change for their team but do not have the influence or resources.

SOURCE: Microsoft

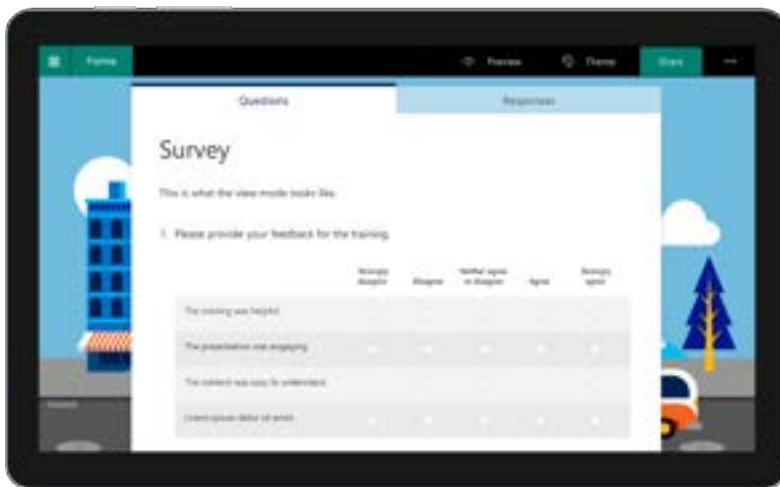
Resources like this can help explain and detail to the C-Level why they should be focusing on all stages of EX including development.

Stage 7 – Departure with Microsoft 365 and Microsoft Viva

The departure stage is critical, and Microsoft 365 does a lot to keep things secure and compliant post-departure and provide rich ways to ensure employees feel heard, seen, and appreciated.

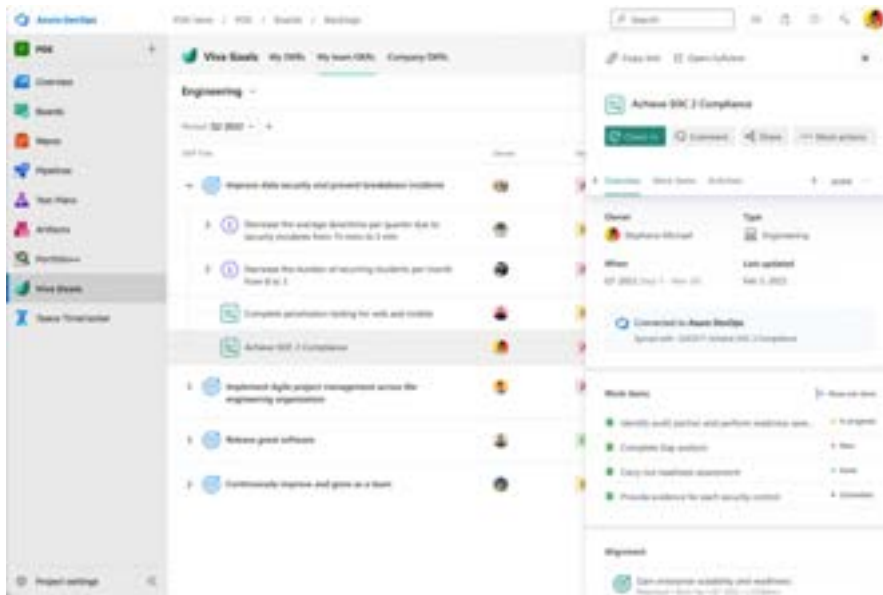
Forms, Surveys & Interaction Opportunities

While every departure should have a supportive exit interview, you could also consider complimenting these motions with feedback forms like those that can be easily powered by Microsoft Forms, Power Apps, Microsoft Lists, or more. These can empower anonymous feedback or can be designed to streamline and simplify the feedback experience, so it's easier for the existing employee and more insightful for the organization.



Clarity On Impact Even On Exit

Solutions like Microsoft Viva Goals are valuable even when an employee is exiting as it gives them a richer understanding of how they have impacted goals, and they can take that knowledge with them as they pursue future opportunities (working as a great way to summarize their impact) while also making it clear for both parties if some goals were left unmet or had not advanced in the way that both parties would have preferred





Stage 7

Departure with Microsoft 365 & Microsoft Viva

Top Takeaways



01 / Balance Security with Prioritizing Exit Experience

The departure stage is critical, and **Microsoft 365** does a lot to keep things secure and compliant post-departure and provide rich ways to ensure employees feel heard, seen, and appreciated.



02 / Go Beyond A Basic Exit Interview

While every departure should have a supportive exit interview, you could also consider complementing these motions with feedback forms like those that can be easily powered by **Microsoft Forms**, **Power Apps**, **Microsoft Lists**, or more. These can empower anonymous feedback or can be designed to streamline and simplify the feedback experience, so it's easier for the existing employee and more insightful for the organization.



03 / Highlight the Positive Impact They Had When Exiting

Solutions like Microsoft Viva Goals are valuable even when an employee is exiting as it gives them a richer understanding of how they have impacted goals, and they can take that knowledge with them as they pursue future opportunities (working as a great way to summarize their impact) while also making it clear for both parties if some goals were left unmet or had not advanced in the way that both parties would have preferred.

Consider This



54%
of people managers say
leadership at their company is
out of touch with employees.

SOURCE: Microsoft
The departure stage is the perfect time
to gain valuable information that
employees might hesitate to give while
employed at your organization.



56%
of pandemic hires are
considering changing employers
in the next year.

SOURCE: Microsoft
Prevent this from happening at
your org by identifying 'whys' in
the departure stage.

Stage 8 - Post Departure or Alumni with Microsoft 365 and Microsoft Viva

Companies that actively support an alumni experience drive business, recruitment, and bottom-line growth by creating a post-employee experience that reinforces engagement and advocacy.

- Engaging your alums will increase net new business through referrals and connecting on opportunities.
- Engaged alumni further increase brand sentiment and can often act as highly effective brand advocates (far more so than an average customer – with some predictions evaluating their worth as at least 5X more). Often leading to tangible increases in Glassdoor CEO Approval ratings and more.
- Engaging alumni can lead to significant cost savings by yielding a much greater rehire rate, with millennials especially being ready to return to an employer if engaged as alumni.
- Engaging alumni can mean a higher retention rate and longer term of engagement with boomerang hires or enabling them more easily to engage in contract work as many are willing to do project-based work even as ex-employees.

Alumni Extranet Portals & Experiences

Alumni portals can help maintain relationships with important influencers and referrers or even people who may come back to work for you one day. With either Power Pages, Power App Portals, or SharePoint-based extranets, we can create environments where alumni can use their consumer (B2C) credentials to access resources, get insights into opportunities, or further connect with others via events and experiences.

What could be in this space?

- News and messaging.
- Job opportunities.
- Events (virtual, in-person, or hybrid).
- Projects, groups, communities, and more.

Manage Alumni Communications

Microsoft Lists, Power Platforms Dataverse, Azure, and more provide easy ways to manage alums and then target them with key communication. Deep integration with the Dynamics 365 experiences and an extensive vendor ecosystem of hundreds of vendors means building simple, complex, or integrated solutions to manage communications. Keeping in touch with Alumni is possible with Microsoft 365.



Stage 8

Post Departure or Alumni with Microsoft 365 & Microsoft Viva

Top Takeaways



01 / Improve the First Stage of EX with the Last

Companies that actively support an alumni experience drive business, recruitment, and bottom-line growth by creating a post-employee experience that reinforces engagement and advocacy.



02 / Create An Experience Post-Departure

Alumni portals can help maintain relationships with important influencers and referencs or even people who may come back to work for you one day. With either Power Pages, Power App Portals, or SharePoint-based extranets, we can create environments where alumni can use their consumer (B2C) credentials to access resources, get insights into opportunities, or further connect with others via events and experiences.



03 / Stay On Top of Alumni Communication

Microsoft Lists, Power Platform Dataverse, Azure, and more provide easy ways to manage alums and then target them with key communication. Deep integration with the Dynamics 365 experiences and an extensive vendor ecosystem of hundreds of vendors means building simple, complex, or integrated solutions to manage communications. Keeping in touch with Alumni is possible with Microsoft 365.

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.

Our Whitepapers & Related Resources

A few of our popular (and comprehensive) whitepapers and eBooks:

Microsoft Copilot Rollout Companion – Prepare, Pilot, Scale, and Extend

Get ready to rollout Microsoft Copilot in your organization with our [Copilot Toolkit](#)! This toolkit features a 4-step series with videos and accompanying checklists, offering valuable insights into preparing, scaling, and extending this innovative tool. With a focus on practical tips and best practices, this resource is a must-read for you and your organization!

What to expect

- Step 1 – Preparing for Microsoft Copilot
- Step 2 – Piloting Microsoft Copilot
- Step 3 – Scaling Microsoft Copilot
- Step 4 – Extending Microsoft Copilot

Transform your Employee Experience with Microsoft 365, Viva, and Copilot

Dive into optimizing employee engagement and productivity with our free [100+ page whitepaper](#). Whether you are new to Microsoft 365, Viva, Copilot or looking to enhance your existing setup, this guide offers expert insights and practical advice to elevate your organization's employee experience to new heights.

Core Whitepaper Topics

- What is the Employee Experience and Why is it Important?
- Understanding the 8 Stages of the Employee Experience
- M365, Viva, and Copilot Impact on Each Stage of the Employee Experience

Ideas That Will Transform Your Digital Employee Experience

[This eBook](#) provides 40 solution ideas to help various areas of employee experience. Save valuable time searching through various sites and find the solution to your EX roadblocks in our eBook.

Core eBook Topics

- DEX Solution Index
- DEX Solution Use Cases

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

- Understanding Digital Workplace Sprawl
- 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.

Core Whitepaper Topics

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

"When to Use What" In Office 365

This [70+ page whitepaper](#) is a guide to providing the right kind of enterprise user guidance for Office 365.

What to expect

- Which Tool When: Options, Scenario Recommendations & Examples

Measuring the Business Impact & ROI of Office 365

This [60+ page whitepaper](#) outlines many key considerations around how to measure the impact Office 365 has on a business while also outlining how Office 365 provides effective reporting capabilities today.

What to expect

- Understanding & Aligning Business Objectives
- Business Impact & ROI By Office 365 Capability Mapping
- Business Impact & ROI Calculation & Measurement Examples

Driving Office 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

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

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

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](#)

"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."

[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."

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 www.2toLead.com
- Follow us on LinkedIn
- Like us on Facebook

Kanwal Khipple

Founder & Chief Executive Officer

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 a recipient of the Neilson Norman award for Top 10 Intranets (2014 & 2015).

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.



www.linkedin.com/in/KanwalKhipple



Kanwal@2tolead.com



+1 416-888-7777



Richard Harbridge

Chief Technology Officer

Richard works as a trusted advisor with hundreds of organizations, helping them understand their current needs, future needs, and actions they should take to grow and achieve their bold ambitions.

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 worldwide. When not speaking at industry events, he serves on multiple committees, leads user groups, and is a Board Member of the Microsoft Community Leadership Board.



www.linkedin.com/in/rharbridge



Richard@2tolead.com



+1 416-300-3678



