



# Microsoft Viva Insights adoption guide



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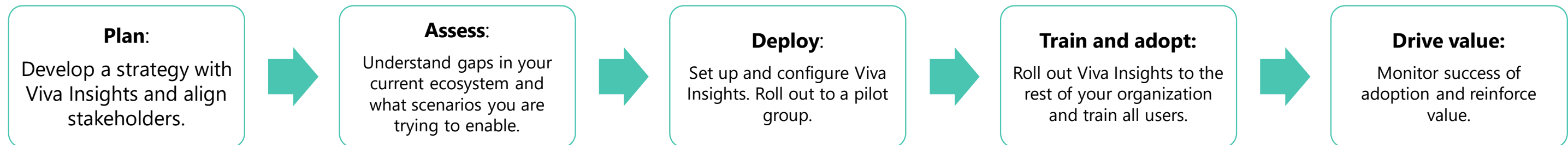
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# Adoption guide overview

## Purpose of this document

Adopting new technology brings change, and change can be daunting. The purpose of this document is to help you successfully navigate attaining company-wide adoption of Microsoft Viva Insights. This how-to guide will walk you through the steps of deploying Microsoft Insights to your organization and driving adoption to help ensure your employees reach their learning objectives.

## Adoption steps



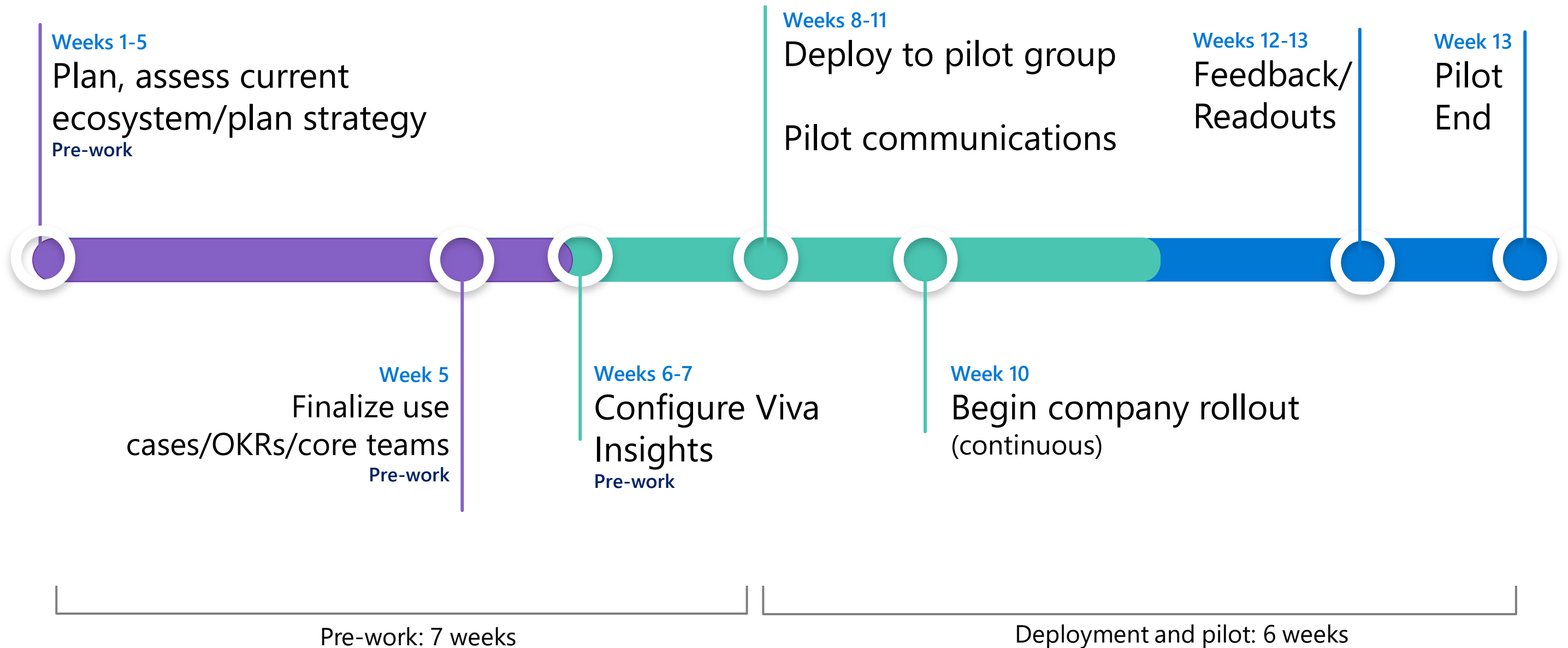
# Sample project plan

Step	Task	Accountability (SAMPLE)	Target Completion (SAMPLE)
<b>Plan</b>	Identify core team and R&Rs	Customer organization, service partner (opt)	[Fill out with dates]
	Identify target scenarios	Customer organization, service partner (opt)	
	Define success criteria and OKRs	Customer organization, service partner (opt)	
<b>Assess</b>	Assess organizational readiness	Customer organization, service partner (opt)	
	Understand your environment and gaps	Customer organization, service partner (opt)	
	Technical readiness checklist	Customer organization, service partner (opt)	
<b>Deploy</b>	Deployment resources	Customer organization, service partner (opt)	
	Advanced Deployment Guides	Customer organization, MSFT support, service partner (opt)	
<b>Train and adopt</b>	Communication plan	Customer organization, service partner (opt)	
	Training strategy	Customer organization, MSFT support for training	
	Align training strategy to launch plan	Customer organization, service partner (opt)	
<b>Drive value</b>	Gather insights – monitor satisfaction and success metrics	Customer organization, MSFT support, service partner (opt)	
	Reinforce adoption	Customer organization	

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# Sample timeline



# Introduction

Microsoft Viva Insights empowers individuals, teams, and organizations to build better work habits, achieve balance, and improve business outcomes with personalized insights and recommended actions.

- **Individuals** receive personal insights visible only to them to help identify opportunities to change how they work so they can do their best work.
- **Manager** insights make it easy to understand current team norms and take action to foster engaged and high-performing teams.
- **Leader** insights provide broad visibility across the organization, identifying opportunities to improve effectiveness and create business outcomes.
- Advanced tools and capabilities enable even deeper analysis to help address the targeted challenges most important to your organization.



# Audiences for this document



**IT leads/admins** in charge of deployment and adoption, and who need to frame adoption requirements, resourcing, and effort to business stakeholders.



**Business users looking to revitalize their organization's Employee Experience**, including, but not limited to, Champions, change management/adoption specialists, HR, and internal communications teams. Also, the person (or persons) made accountable by the business stakeholders to achieve maximum satisfaction of the Employee Experience.

**Plan**

# Assemble your team

Adopting new technology requires buy-in and support from across the business. Below are key groups and team members who can help bridge technology and business outcomes that matter to your organization. Note that for successful rollout, IT, and HR departments will have to partner to align technical and employee experience scenarios and goals.

	Role	Responsibilities
Key roles	Executive Sponsor	Communicate high-level vision and values of Viva Insights. Help identify and prioritize top HR needs. Connect regularly with HR and IT leaders across the organization. Actively participate in and use Viva Insights capabilities to help drive and reinforce adoption.
	Success Owner	Ensure the business goals are realized from adoption of Viva Insights.
	Program Manager	Oversee Viva Insights deployment process and logistics.
	Champions	Help evangelize Viva Insights and manage objection handling.
	Training lead	Help train the early adopters and oversee training content. Could also be a Champion.
	Department Leads (Stakeholders)	Identify how department will use Viva Insights and encourage engagement.
	IT Specialists	Oversee all technical aspects of the setup, deployment, and rollout. Partner with HR to develop plan for fitting Viva Insights into company technology stack. IT specialists must have necessary admin permissions to set up and configure the product.
	Communication Lead	Oversee company-wide communications about Viva Insights.
	HR Manager	Help develop plan for how Viva Insights will fit into the rest of the employee ecosystem, inform company rollout, and drive adoption.



# Identify target scenarios

Target scenarios describe how your employees will use Microsoft Viva Insights to address business challenges.

## Scenario identified

Enhance business performance

Foster high performing teams in a hybrid era

Boost employee engagement and retention

## How it applies to the organization

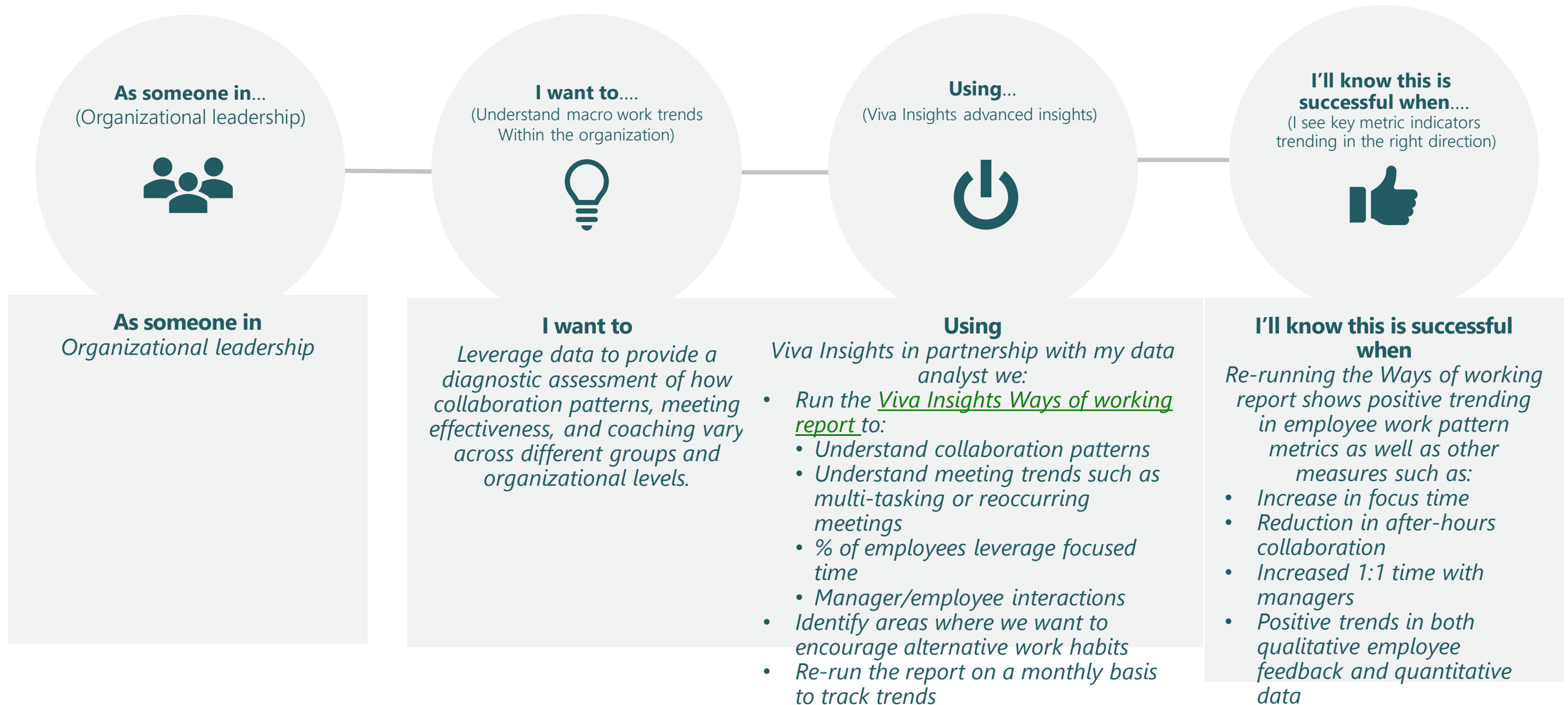
Improve meeting effectiveness, address meeting overload, help managers keep a pulse on team needs, help employees manage time better and stay focused.

Develop an inclusive and adaptable hybrid work plan, support flexible work schedules

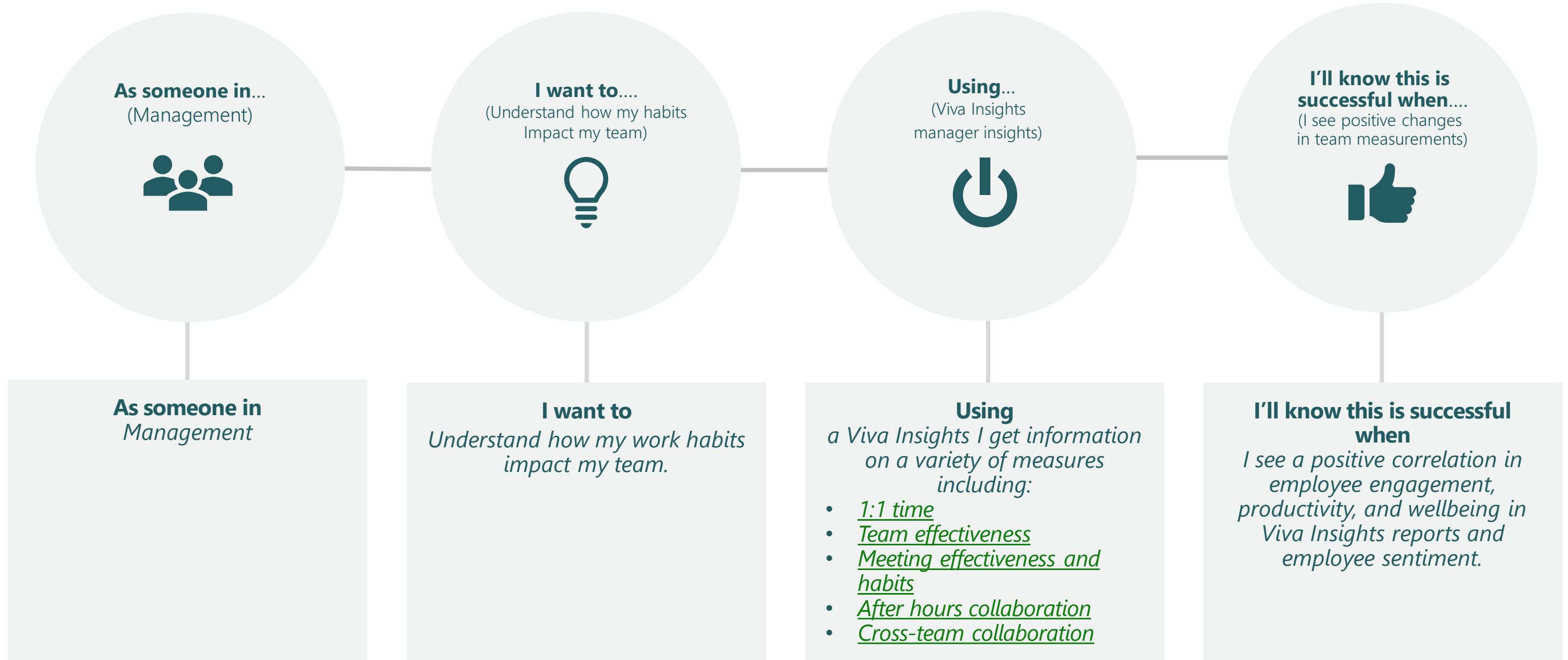
Reduce employee burnout, prioritize wellbeing, be mindful about after-hours collaboration, "always-on" culture, encourage praise and recognition, foster connection and fulfillment

For more details on how to leverage Viva Insights for business scenarios see: <https://aka.ms/VivaInsightsJumpstartChange>

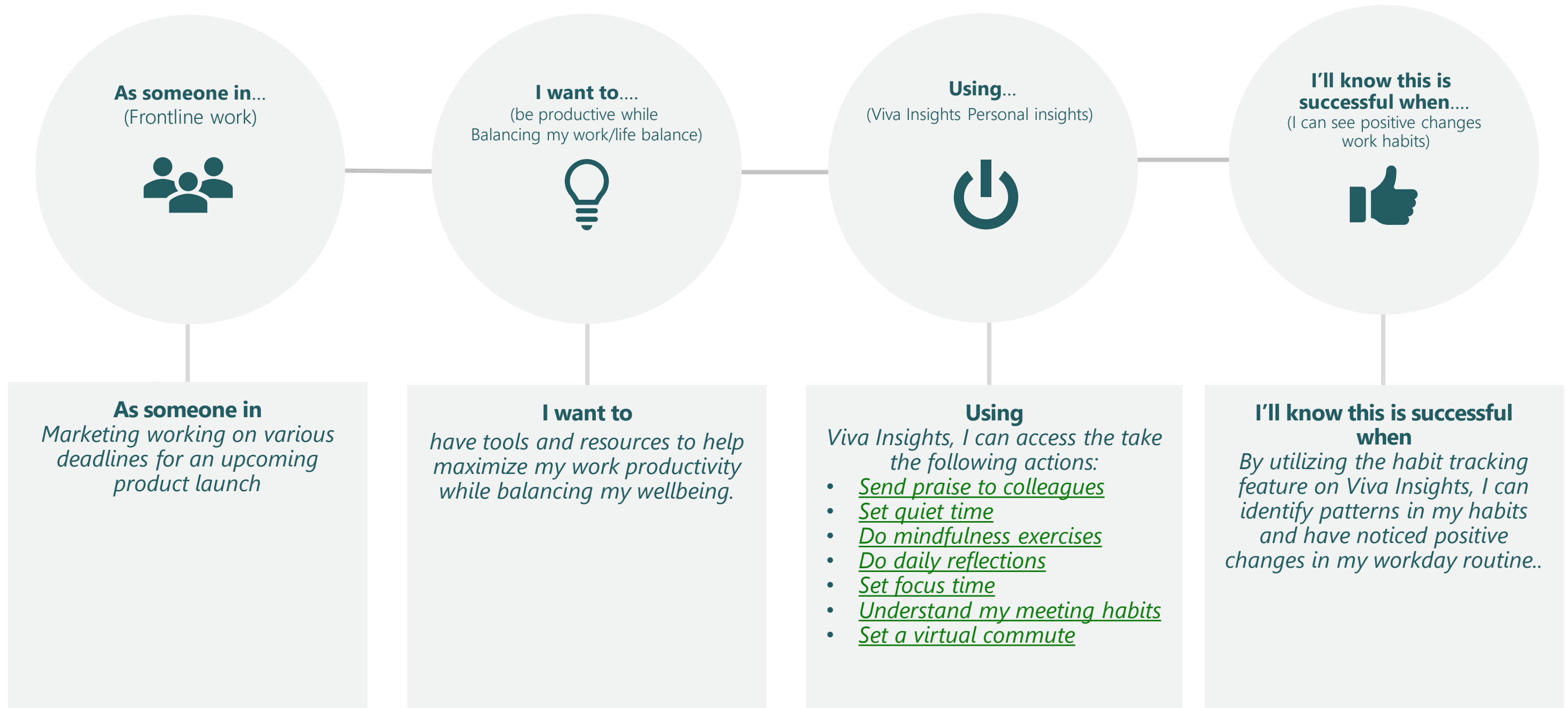
# Target adoption scenario example: Organizational Leader



# Target adoption scenario example: Manager



# Target adoption scenario example: Individual Contributor



# Define success criteria



## Define goals

- What are you trying to accomplish?
- What does success look like?
- i.e., increase in individual focus hours, reduction in long, reoccurring meetings, increased regularity of 1:1 time.



## Identify key performance indicator (OKRs)

These should improve based on adoption and will show leadership the impact of Microsoft Viva Insights



## Establish OKR benchmarks



Determine ways to gather and measure user satisfaction and progress against benchmarks



# OKR examples

Choose criteria to demonstrate the impact of Microsoft Viva Insights against each success measure. Below are examples of success measures, methods for measuring, and desired goals.

Success measure	Method	Goal
<p><b>Enhance business performance</b> Improve meeting effectiveness, empower managers, and help increase employee focus time.</p> <p><b>Foster high performing teams in a hybrid era</b> Develop an inclusive and adaptable hybrid work path. Support flexible work schedules.</p> <p><b>Boost employee engagement and retention</b> Reduce employee burnout, prioritize wellbeing. Foster a culture of praise and recognition. Foster connection.</p>	<p><b>Quantitative</b></p> <ul style="list-style-type: none"> <li>• <a href="#">Ways of working report</a></li> <li>• <a href="#">Business resilience report</a></li> <li>• <a href="#">Wellbeing report</a></li> <li>• <a href="#">Manager effectiveness report</a></li> <li>• <a href="#">Hybrid workforce experience report</a></li> <li>• <a href="#">Meeting effectiveness report</a></li> </ul> <p><b>Qualitative</b></p> <ul style="list-style-type: none"> <li>• Employee sentiment data through employee engagement/listening tools</li> </ul>	<p>Comparison of pre and post Viva Insights reports/dashboards will show positive trends on the measurable criteria based on business priorities.</p> <p><b>Reduction criteria</b></p> <ul style="list-style-type: none"> <li>- X decrease in hours spent collaborating outside working hours</li> <li>- X decrease in meeting multi-tasking</li> <li>- X decrease time spent in reoccurring meetings</li> <li>- X decrease in % of meetings that overlap of meeting attendance with manager and employees</li> <li>- X decrease in large and lengthy meetings</li> </ul> <p><b>Growth criteria</b></p> <ul style="list-style-type: none"> <li>- X Increase in uninterrupted focus hours</li> <li>- X increase in employees who are receiving 1:1 time with managers</li> <li>- X increase in internal connections/network size</li> <li>- X increase of hours collaborating across functional teams</li> </ul>

**Assess**

# Assess organizational readiness

## What is readiness



Willingness and preparedness of your users and your organization to use Microsoft Viva Insights.

It's important to determine how receptive your users will likely be to changing the way they work and adopting new technology. Your rollout plan should reflect the readiness of your organization.

## Readiness factors



Determining readiness and appetite for change requires:

- Clear vision of organization shift
- Clear vision of user shift
- Amount of overall change required
- Executive alignment

## Readiness assessment questions



Determine readiness by asking these questions:

- What were the success factors when previously rolling out new technology? What were the pitfalls?
- Are there other major rollouts happening in the organization?
- What internal resources can be leveraged to help spread awareness? (i.e., communication channels, training cadence, leadership events, etc.)
- What are the benefits and risks with this roll out?
  - o How can you highlight benefits?
  - o How can you mitigate the risks?

## What will the impacting changes be?

Identify who will be most impacted by the change of Viva Insights adoption. Create a collaboration space for these individuals to discuss experiences, tips/best practices for driving adoption, and scenarios. For example, this may be the early adopter leads for each team at your company who wouldn't normally interact much with each other.

# Assess your technical readiness


Technical readiness is key to ensuring your organization is ready for launch. Use this checklist to identify items that need to be completed before go-live.

Readiness Item	Complete? Y/N	Plan to Complete
Understand the different <a href="#">Viva Insights roles and access levels</a>		
<a href="#">Prepare organizational data</a> in Viva Insights		
Identify the appropriate <a href="#">rollout scenario</a>		
Set the Viva Insights <a href="#">configuration</a> to identify which elements users have access to		
Run a <a href="#">pilot rollout</a>		
Assess the <a href="#">pilot lessons</a> to inform larger organizational rollout		
<a href="#">Assign licenses</a> to users in Microsoft 365		
<a href="#">Configure access</a> at the tenant level		
Prepare help desk		

**Deploy**

# Resources for planning your deployment

Leverage these resources to plan for your Viva Insights deployment.

 **Microsoft** | [Learn](#) [Documentation](#) [Training](#) [Certifications](#) [Q&A](#) [Code Samples](#) [Assessments](#) [Shows](#) [Events](#)

**Microsoft Viva** [Viva Connections](#) [Viva Insights](#) [Viva Learning](#) [Viva Topics](#) [Viva Goals](#) [Viva Sales](#) [Viva Engage](#)

- Introducing Microsoft Viva Insights
  - Introducing Microsoft Viva Insights
  - Privacy and data protection
  - Environment requirements
  - Setup introduction**
  - Personal insights
  - Team and organization insights
  - Advanced insights

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## Viva Insights setup overview

Article • 01/26/2023 • 2 minutes to read • 1 contributor [Feedback](#)

Depending on the insights you want to see and which features they need, the setup process for Microsoft Viva Insights varies. This article gives a quick overview of the different types of insights available in Viva Insights and what you need to do to get things up and running.

### Personal insights

Your admin needs to set up Viva Insights for personal insights before you can start using the different personal insights apps that are available. For details, refer to the [Admin guide for personal insights](#).

[\*Viva Insights setup overview\*](#)  
[Microsoft Learn – Documentation.](#)

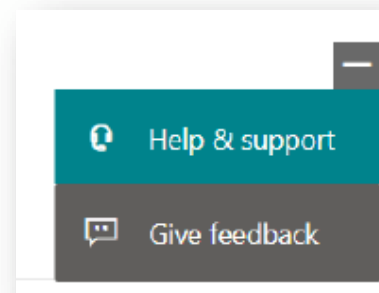


Be sure to review and understand the adoption recommendations detailed in this document **before** you begin the deployment phase.

# Advanced Deployment Guides

Advanced Deployment Guides are step-by-step online guides that are **embedded within your tenant's administration experience**. They allow you to track every step of your deployment journey, and in some cases help you automate it.

To locate the Advanced Deployment Guide, click on the **Help & Support** button in your Microsoft 365 admin center and search using the plain text search. Here is an example for Viva Connections.



**Microsoft Viva Insights**

Microsoft Viva Insights boosts your organization's productivity by giving users insights about their work habits and suggestions to work smarter. [Learn how other organizations are using Viva Insights today.](#)

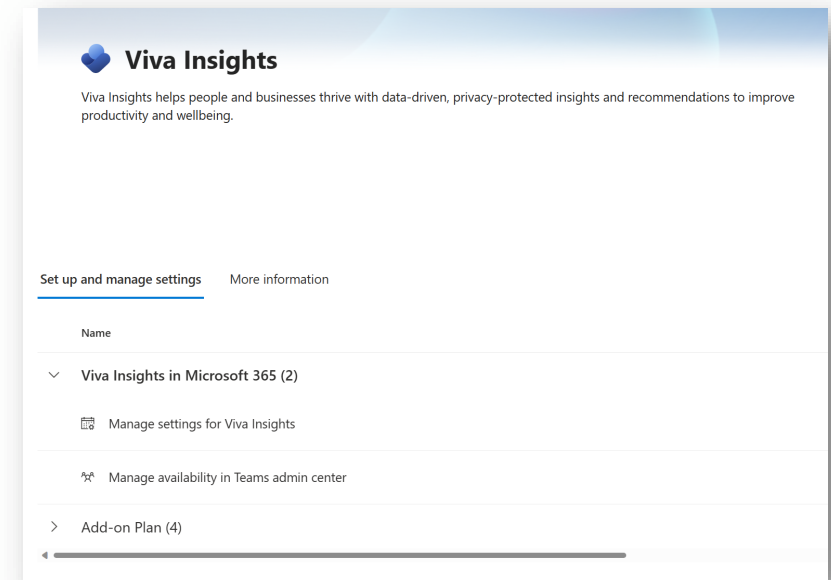
[Find out how Viva Insights protects user privacy.](#)

Which Viva Insights elements should users have access to?

These will be the default settings for all users. Users can change them at any time from their dashboard settings page. It may take up to 24 hours for all changes to take effect. [Learn more about Viva Insights elements.](#)

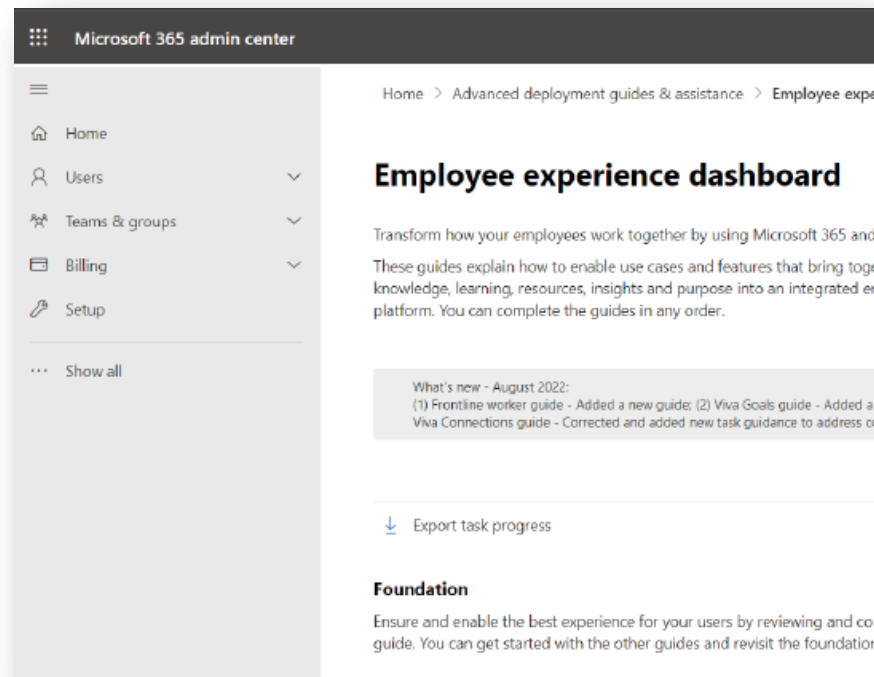
- Viva Insights web experience
- Digest email
- Insights Outlook add-in and inline suggestions
- Meeting effectiveness surveys
- Schedule send suggestions  
In Outlook, show suggestions to align email delivery with working hours. [Learn more about schedule send suggestions](#)

Save Cancel

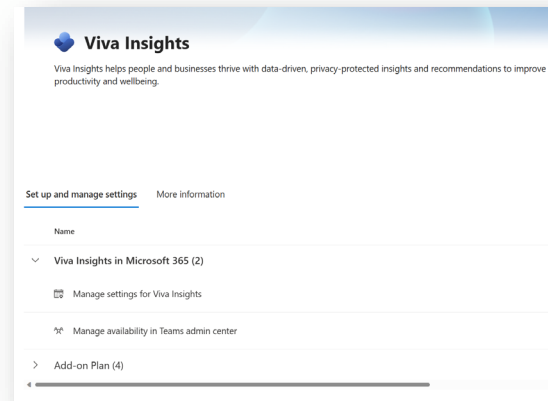


You can also go directly to your tenant's Advanced Deployment Guides repository for Employee Experience by visiting <https://aka.ms/EmployeeExperienceDashboard>.

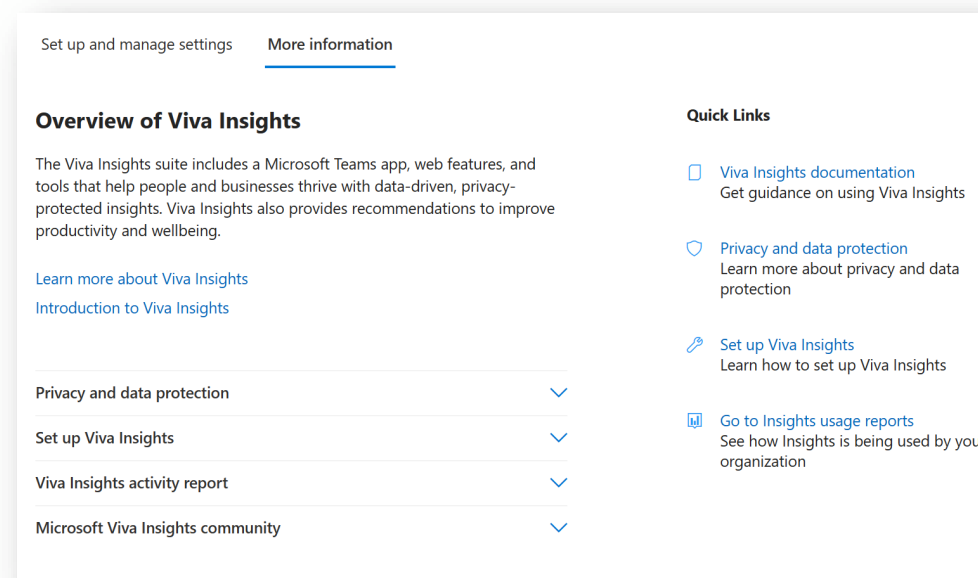
# Advanced Deployment Guides



The Employee Experience dashboard in Microsoft 365 admin center.



The two Advanced Deployment Guides currently available for Viva Insights



Each guide allows you to track every step in the deployment, provides detailed guidance, and allows you to assign tasks with due dates to your team and track progress.

**Train and adopt**

# Communication plan

## Teaser campaign

Campaign to raise awareness across your company about the value Viva Insights will provide.

- Email blast to company introducing Viva Insights. Highlight scenarios of value that Viva Insights will provide to the organization and key roles (refer to scenario slides in Plan section).
- Generate excitement and awareness regarding the app.
- Gain staff buy-in for project by outlining 'what's in it for them'.

Download email/communication templates from the <https://aka.ms/VivaInsightsCommunicationPlan>.

PRE-LAUNCH



## First day set up

Share user guides and help articles to help employees get set up quickly and easily.

## Launch/buzz campaigns

- Quick demo in company Town Hall
- Announcement email with links to [how-to instructions](#) to help end users get set up quickly and easily.
- Scenario-focused events and email campaigns that showcase the user experience.

LAUNCH



## Tips campaign

Campaign focused on key scenarios and tips to help employees get the most value from using Viva Insights.

- Make it top of mind for staff regarding how to work in new ways with Viva Insights.
- Reinforce new behaviors and resources to support – outline key stop, start, continue behaviors.

Share common scenarios with the Viva Insights

- [Personal insights day in the life guide](#).
- [Manager insights day in the life guide](#).

POST-LAUNCH



# Training strategy



## Focus on the why

Make sure employees know why the change is happening, what's in it for them, and why they're being asked to change.



## Use real work scenarios

Use tasks or processes familiar to your audience to draw them into learning how to use the technology.



## Use multiple formats

Training end users should take on multiple forms to accommodate different learning styles, geographical barriers, and resource constraints.



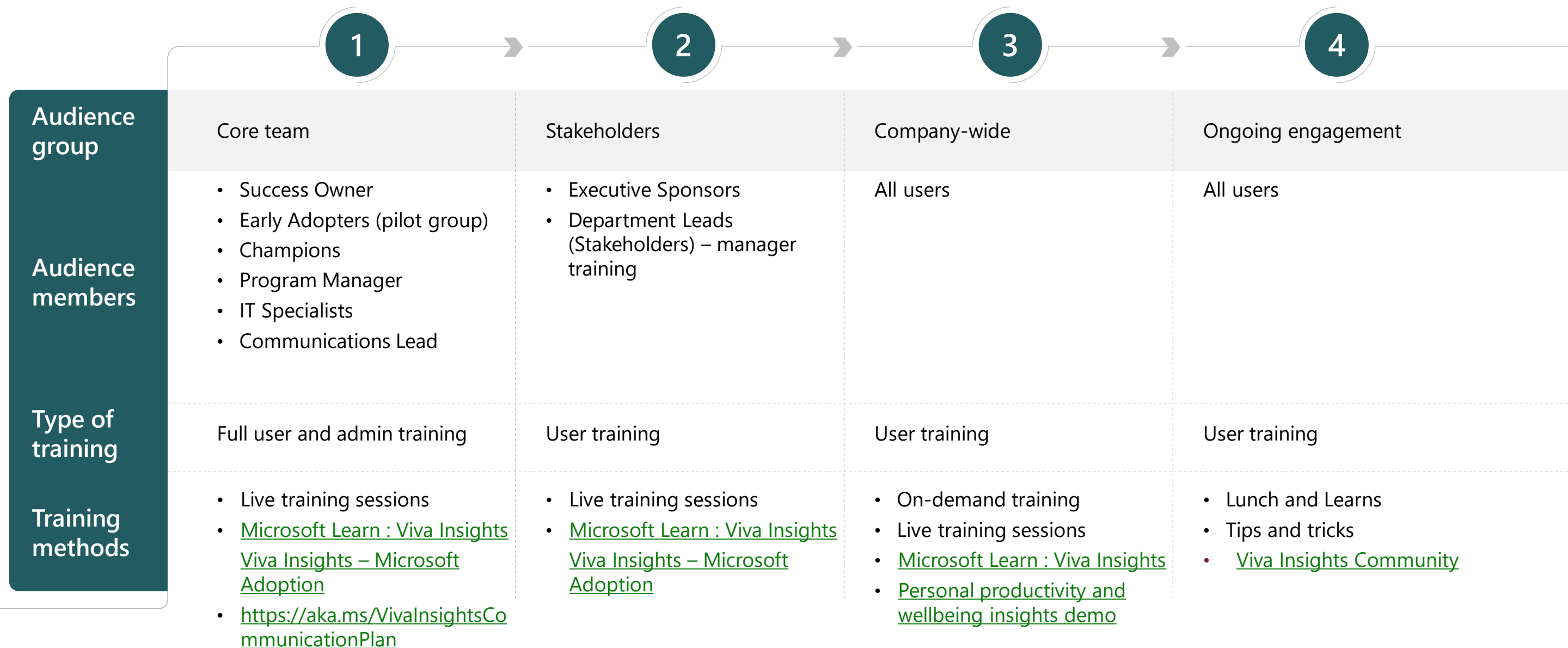
## Reinforce

Make the training stick with reinforcement options like on-demand training, lunch and learn sessions, and new employee training options



# Align training strategy to launch plan

Design your training strategy to scale with your launch. Start with the groups that will champion Viva Insights and IT, before launching to the broader organization.



**Drive value**

# Gather insights

- Leverage built-in [Viva Insights reporting](#) (available in the Microsoft 365 admin center) to monitor product adoption and understand learning behavior in your organization. Refer to OKRs identified in Plan stage.
- Present trends and progress on KIPs identified earlier to leadership.



# Monitor satisfaction

Surveys are a great tool to gather data about user sentiment toward Viva Insights. The results can help you determine the success of the rollout and get you thinking about necessary next steps.

- 1 Circulate a baseline survey shortly before users begin using Microsoft Viva Insights.
- 2 Conduct a survey halfway through launch to gather data about users' experiences.
- 3 Use the results to make any necessary adjustments.
- 4 Create new awareness or training content to address outstanding needs that arise.
- 5 Release final survey 90 days after launch, and then in quarterly increments, to help measure user satisfaction and productivity.

## Example questions for survey:

Please indicate how much you agree or disagree with the following statements (on a scale from strongly disagree to strongly agree):

- I have access to tools and resources that help me maintain clear work/life balance.
- I have access to tools and resources to help maximize my effectiveness at work.
- I have access to data that helps me understand my work habits.
- I regularly engage with my manager in 1:1's where I can discuss my career development.
- I have the tools to ensure my meetings are more focused and effective.
- As a manager, I have a better understanding of my team's work habits.

Compare results before and after rolling out Viva Insights.

# Reinforce adoption

Cultural evolution is critical to adoption. Continuous adoption activities are the key to long term engagement.



Update examples and trainings often so employees can relate to them. Share success stories of Viva Insights



Add Microsoft Viva Insights training to employee onboarding process



Teach people to use the tools as a set –talk about Microsoft Teams and Microsoft Viva Insights together



Continue to find your Champions – advocates for change within the business – including executives, managers, and admins



# Adoption best practices

# Adoption best practices

- Viva Insights should be complementary to your culture and values.
- Set a hard date for transitioning employees to Viva Insights.. For example, introduce Viva Insights as part of an HR work initiative or program.
- Test and rollout Viva Insights to a pilot group first before rolling out to your whole organization. Continuously gather feedback from pilot group.
- Continue leveraging the pilot group throughout broader rollout. The process is iterative – don't be afraid to go back and adjust parts of the rollout plan based on feedback from the pilot.

## Viva Insights to the rescue: Read Haris's story

"Microsoft Viva has rescued me, more than once, from missing important deadlines. It's keeping me on track."

 Microsoft [aka.ms/VivaVoices-Haris](https://aka.ms/VivaVoices-Haris)



## Tanita used Viva Insights to balance her workload

"It gave me and my manager the info we needed to guide workload changes and bring my best to my customers."

 Microsoft [aka.ms/VivaVoices-Tanita](https://aka.ms/VivaVoices-Tanita)



# Recommended best practices from the Viva Insights community

## Include Viva Insights in relevant executive communications

- Ensure executive sponsorship and support
- Create relevant communication connections to Viva Insights when executives are communicating re: workplace flexibility, work-life balance, employee experience, work culture

## Use your employee communication channels to share *high-value scenarios*.

- Share best practices, tips & tricks directly from employees
- Show common usage scenarios such as “improving meeting habits, creating time for focused work, and email best practices to build healthy work habits.”

## Plan and resource your adoption team for long-term adoption efforts.

- Resource an Employee Experience lead from the planning phase onwards
- Set and track targets for success with [Viva Insights activity reporting](#).
- Monitor activity reporting to understand gaps and opportunities in usage and refine message accordingly

Plan and resource your adoption team for long-term adoption efforts.



# 1 Plan and resource your team for a *weekly* usage cadence.



**Creating habits using Viva Insights doesn't "just happen."  
Successful companies have a plan for deeper employee  
engagement in place.**



## Employee Experience Data Point

Organizations who have deployed Viva Connections but have not defined a strategy for how to engage their employees into frequent usage of the platform have seen less than one in ten employees using Viva Connections once per week or more frequently; and a significant drop of monthly active users within an 8-to-12-week timeframe.

Use your employee  
communication channels to share  
*high-value scenarios.*



## ② Use your employee communication channels to share *high-value scenarios*.

What internal employee communication channels can you leverage?

What creative spins are at your disposal? Incentives, swag, etc. to help drive attention, excitement, and action?

Leverage your champions to create and share best practices, tips & tricks, and most importantly show how they are maximizing their work experience with Viva Insights.

who wants  
to win...  
by sharing\* your ❤️ for Viva?

What about Microsoft Viva makes my life better?  
It blocks focus time automatically

Post your **original video** in the All Company Yammer community sharing what you love about your favorite Microsoft Viva feature. Include the hashtag **#VivaVoices!**

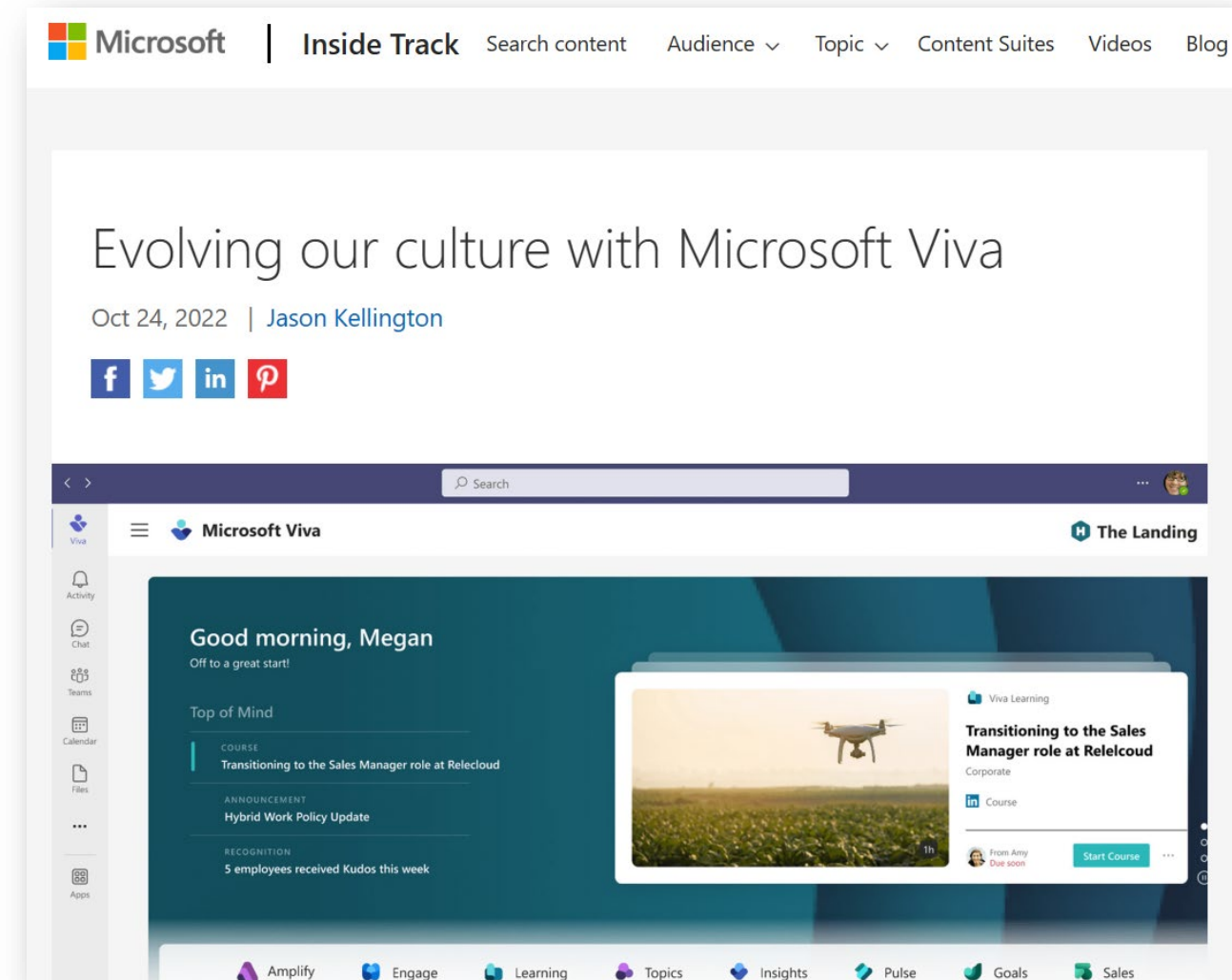
Include Viva Insights in relevant executive communications



# ③ Include Viva Insights in relevant executive communications

At the beginning of your adoption journey an executive sponsor was key to communicate high-level vision and values of Viva Insights.

Create relevant communication connections to Viva Insights when executives are communicating re: workplace flexibility, work-life balance, employee experience, work culture, morale, productivity, and wellbeing.



# Additional resources

# Additional resources



## Microsoft adoption resources

- Review and download Viva Insights resources on [adoption.microsoft.com](https://adoption.microsoft.com)
- [Microsoft FastTrack for Viva](#): Deployment assistance including support from Microsoft engineers with technical expertise on Microsoft Viva and other Microsoft tools.
- [Viva Insights Admin Guide](#): self-service help tool for admins to deploy Viva Insights.
- [Viva Insights privacy resources](#) – videos and eBook to understand privacy and safeguards within Viva Insights
- [Viva Insights rollout and adoption communication guide](#) – Get sample email templates and workback schedule for your rollout
- Other Microsoft reps: contact your account lead to see what is available to you for adoption support, i.e., customer success reps, consultants, etc.



## Learn more about Viva Insights

- Check out the [Viva Insights guided simulation](#) for a walkthrough of using the product.
- Watch the [Viva Insights overview video](#).
- Read the [Viva Insights technical documentation](#) articles for detailed instructions on technical deployment and admin setup.

