



Knowledge & Learning Solutions in Microsoft 365

Playbook Overview

Purpose of this document

Knowledge Management (KM) is the process of identifying, collecting, storing, organizing, and sharing information & learning within an organization. Ensuring that relevant knowledge is easily attainable can be incredibly valuable for an organization, as costly time is saved for outcome-focused tasks, rather than struggling to find needed information.

This document will outline some apps & features available to your organization that are already included in Microsoft 365 through SharePoint, as well as premium apps designed with the *employee experience* in mind, such as Answers in Viva Engage, Viva Learning, and a partnership with Artificial Intelligence through M365 Copilot.

Audience

- Knowledge Managers
- Information Workers
- Administrators



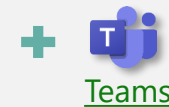
Apps & Tools



[Viva Engage](#)



[Copilot](#)



[Teams](#)

and



[Viva Learning](#)



[SharePoint](#)

Microsoft 365
Chat

Microsoft
Loop

Answers
in Viva

Skills
in Viva
(releasing in 2024)

Challenges for Knowledge Management



Deficient Knowledge Socialization



- Employee tacit knowledge is lost, disorganized, or discouraged.
- Socialization of Knowledge Management strategy is missing or lacking.
- Employee collaboration & crowdsourcing is difficult, blocked, or discouraged.



Lost & Concealed Knowledge



- Unclassified information is lost, or lacks required security and compliance.
- Knowledge is kept within silos or permission governance is blocking employee access
- Awareness of knowledge is concealed within disorganized data repositories.



Complex Knowledge Discovery



- Knowing where & what to search for is challenging, results may be hard to trust.
- Using multiple tools drives context switching, creating frustration that drains productivity.
- Reading & classifying large sets of documents causes information overload and is low value use of employee time.



Lack of Employee motivation & time



- Low or no incentive to help others with time & expertise
- Convoluted processes, bottlenecks, & poorly functioning tools cause motivation loss.

Solutions for Knowledge Management



Deficient Knowledge Socialization



- Create employee connections, streamline collaboration, crowdsource knowledge & feedback.
- Motivate & reward employees to help others by sharing knowledge.
- Optimize knowledge sharing with AI, integrate socialization & knowledge platforms & tools.



Lost & Concealed Knowledge



- Use analytics to organize & optimize data storage, permissions, and classification.
- Optimize knowledge discovery with AI indexing
- Create curated knowledge & learning repositories and platforms
- Empower SMEs to share & curate expertise



Complex Knowledge Discovery



- Streamline knowledge seeking journey with AI
- Organize & optimize data for ideal Searchability
- Streamline sharing, collaboration, and crowdsourcing



Lack of Employee motivation & time



- Motivate & reward contributions to knowledge
- Optimize intranet to reduce bottlenecks and barriers
- Streamline knowledge discovery with AI
- Introduce knowledge into the flow-of-work



Knowledge Management with Copilot & M365 Chat



[Helpful Documentation](#)
[Sales & Pricing](#)



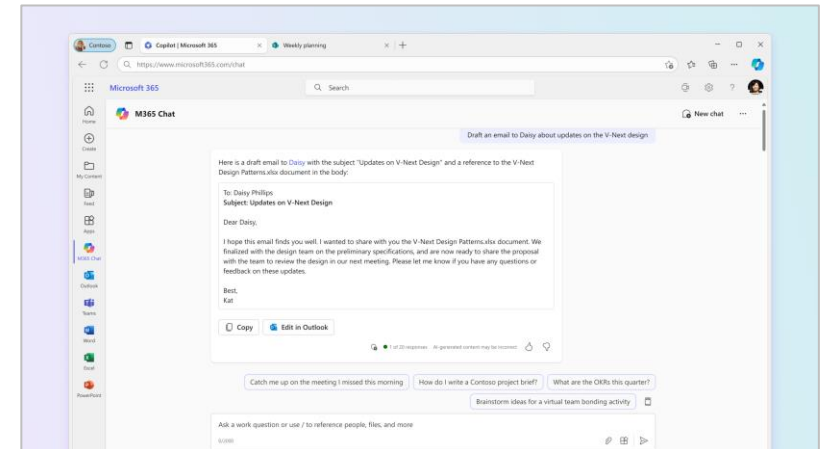
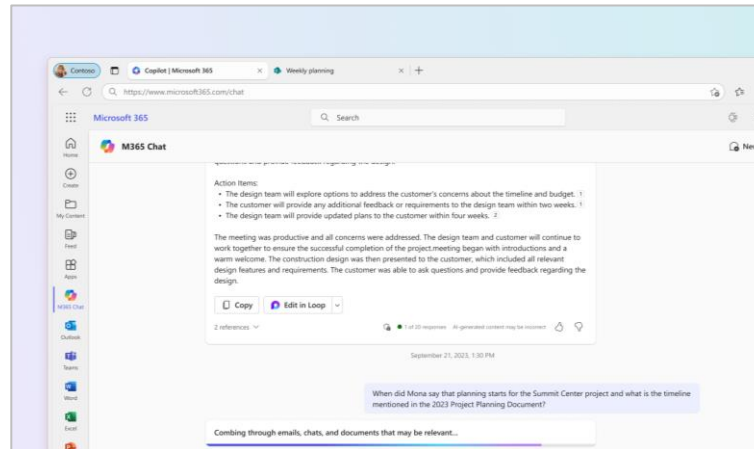
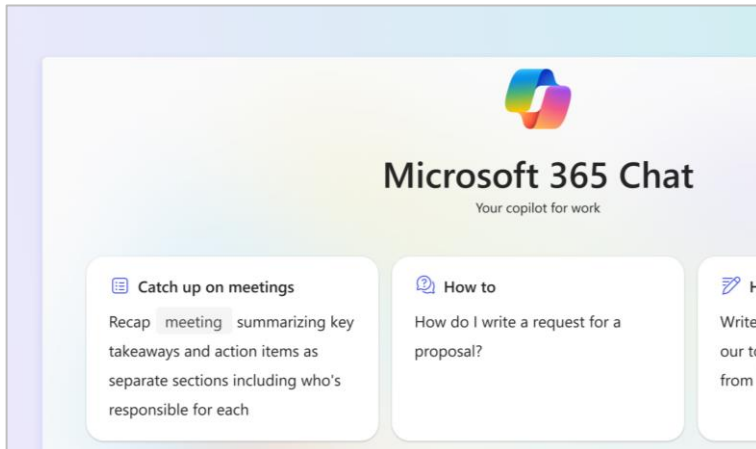
Copilot and Microsoft 365 Chat

for AI *Connected* Knowledge Management

What is Copilot and Microsoft 365 Chat?

[Microsoft Copilot for Microsoft 365](#) enables the people in your organization to discover and learn more about topics, projects, and concepts in a more natural and automatic way, while remaining integrated across the Microsoft 365 suite.

By creating a partnership with Artificial Intelligence & using [Microsoft 365 Chat](#), Copilot can be used as a personal knowledge assistant; by streamlining the discovery of clarity & context, answering questions, & delivering conversational knowledge that is already integrated across the Microsoft 365 suite.



Using Copilot and Microsoft 365 Chat

Copilot with Microsoft 365 Chat provides you with a digital assistant that can be used to unleash productivity by making the search for answers, information, and resources incredibly quick and easy.

Some of the advantages of using Copilot & Microsoft 365 Chat to find & expand on knowledge are:



Stay in one place to learn about concepts “just-in-time” & within the flow of work, without searching for another destination.



Save time by asking Copilot to explain acronyms, project names, platforms, and Organizational concepts you don't yet understand.



Break down knowledge silos by allowing AI to reason over content spread *throughout* the Microsoft 365 suite.

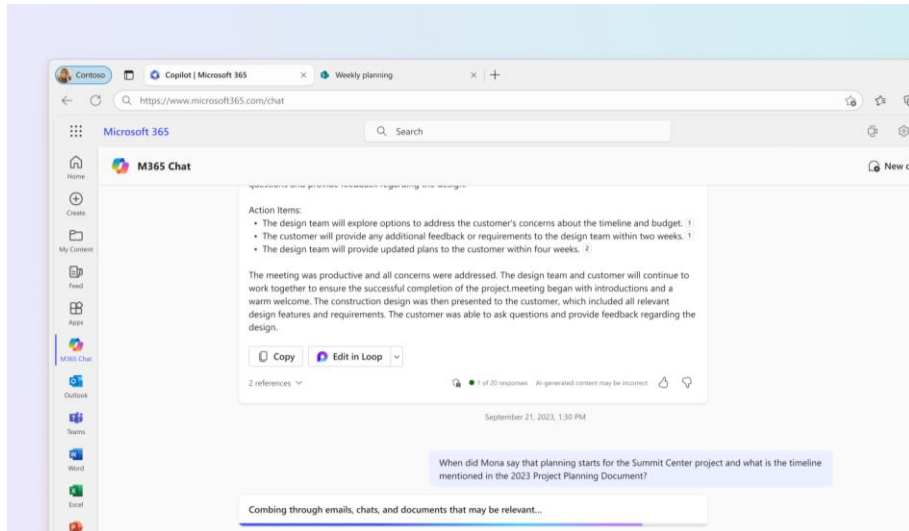


Find experts & resources by asking Copilot about specific projects, and who is working on them.

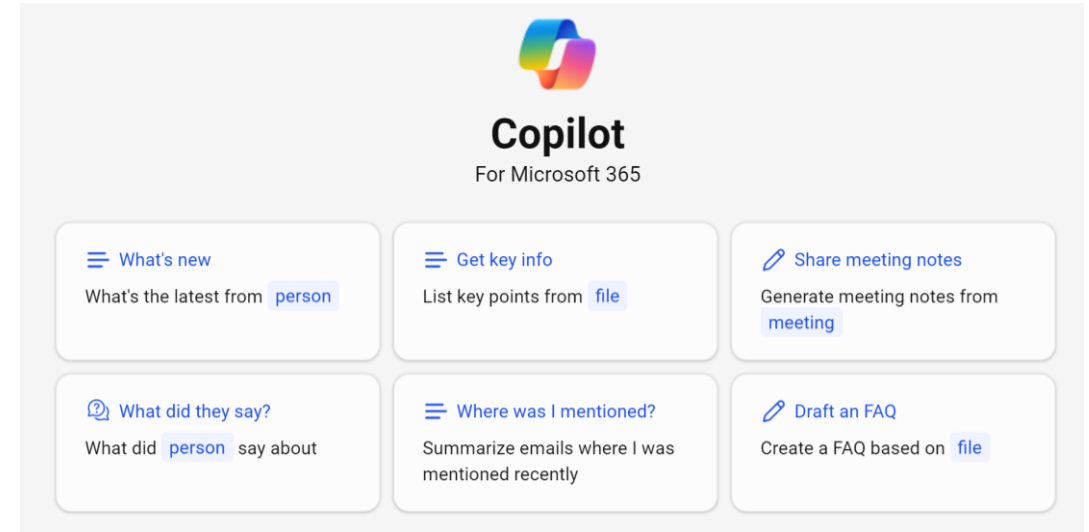
Using Copilot and Microsoft 365 Chat



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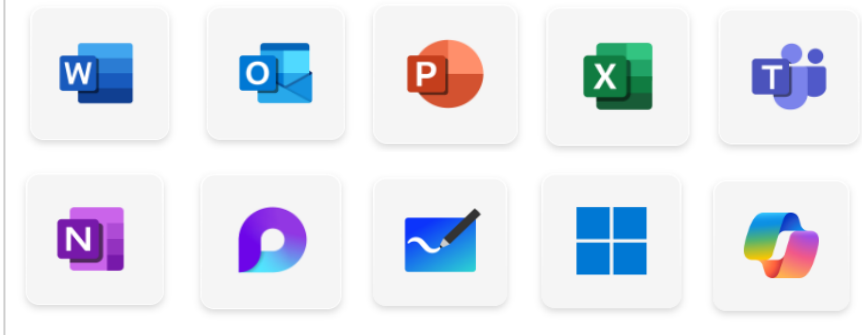
Using Copilot and Microsoft 365 Chat



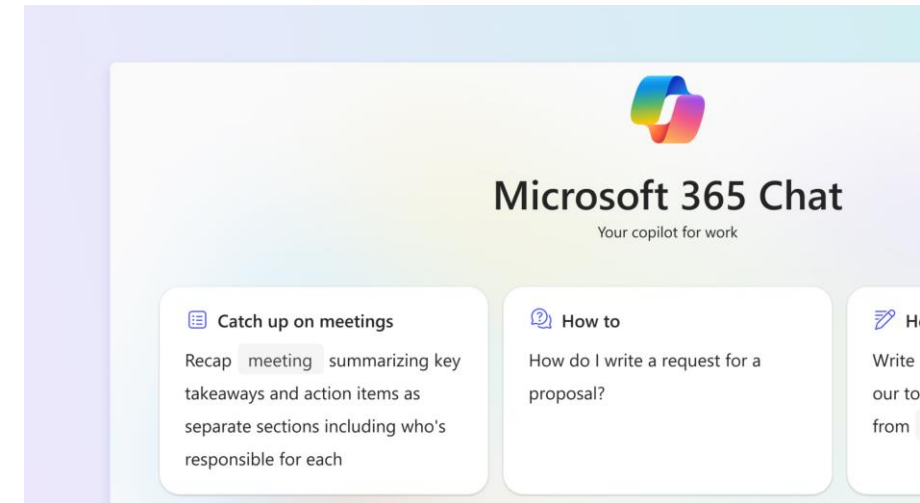
Break down knowledge silos by allowing AI to reason over content spread throughout the Microsoft 365 suite.

Ask

“Who is working on this project?”



Ask Copilot for more information about a project or find experts by asking who is working on that project & product



Better Together

Copilot &
Microsoft 365 Chat



*Consider the following apps, add-ons, and integrations to **enhance** your experience*



[Add the Microsoft 365 Chat App to Teams](#)
And ask Copilot for help



Ask Copilot for answers and find resources with Microsoft 365 Chat in Bing



Ask Copilot to help find additional details to enhance and support your documents in Word, PowerPoint, & Excel



Plan, brainstorm, and collaborate easier with Copilot in Loop.



Use Copilot to transform long emails into short summaries in Outlook



Openly chat with Copilot to get responses to your unique prompts and notes in OneNote



Get formula column suggestions for complex calculations with Copilot in Excel



Kickstart & accelerate your ideation process by generating, categorizing, and summarizing your ideas with Copilot in Whiteboard

Helpful Resources



[Learning Path MS-012: Prepare your organization for Copilot for Microsoft 365](#)



[Cloud Skills 30-Day Challenge: Get AI-Ready with Microsoft 365 Admin](#)



[Microsoft Learn: Microsoft Copilot for Microsoft 365 overview](#)

Customer Story

**HARGREAVES
LANSDOWN**



Financial services leader Hargreaves Lansdown adopts Microsoft Copilot for Microsoft 365 and Microsoft Teams Premium to drive productivity and improve customer experiences

...Rob Compton, Unix Infrastructure Manager at Hargreaves Lansdown, describes his role as one that requires constantly staying up to date on lengthy documentation, sending and reading a large volume of emails, and attending countless meetings, "some of which overlap," he says. In short, his role is well-placed to benefit from the time-saving potential of AI. Working in combination, Teams Premium and Copilot empower employees like Compton with unique AI capabilities distinct to each experience. [Read More Here...](#)

"These tools are helping us make it more enjoyable to be at work. Employees are no longer struggling to complete tasks or find the information they need."

- Vicki Holman; Collaboration Platform Owner

Hargreaves Lansdown



Knowledge Management with Viva Engage & Answers



[Helpful Documentation](#)
[Sales & Pricing](#)

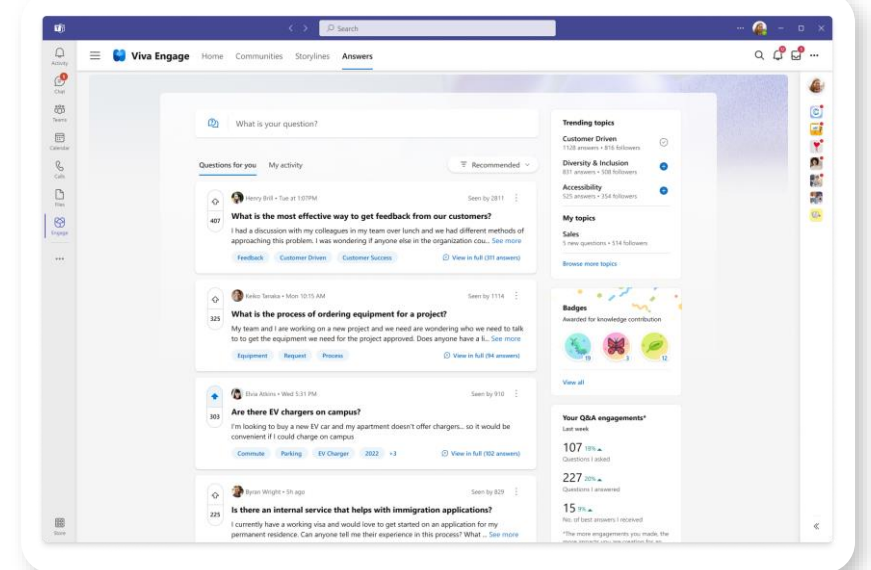
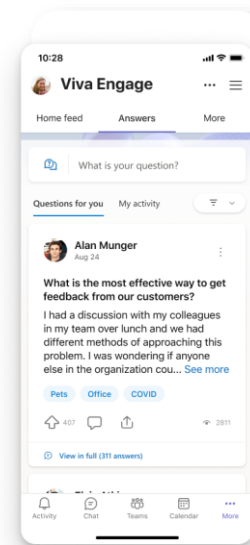
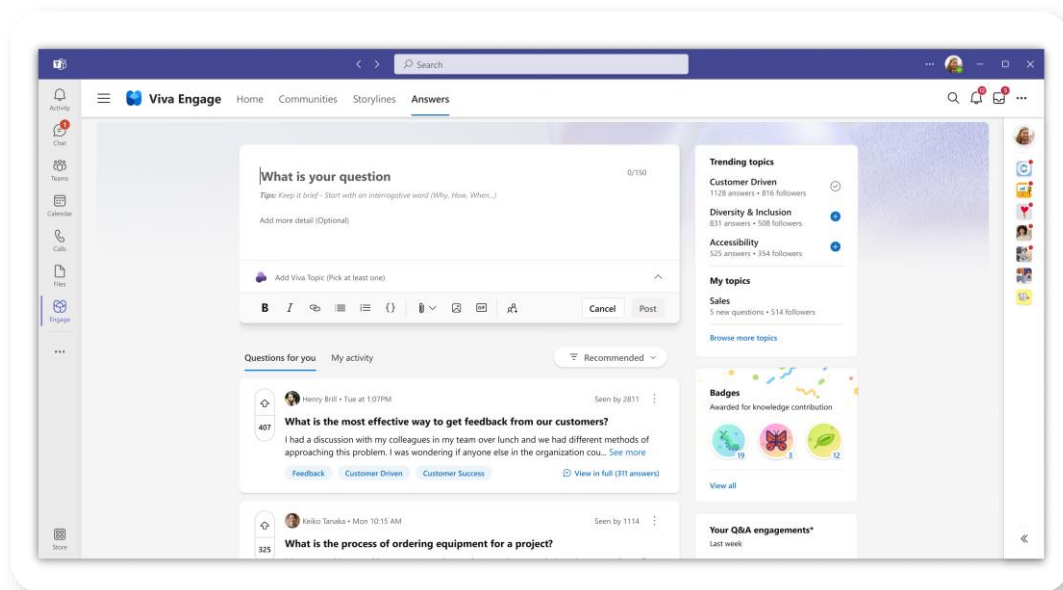


Using Viva Engage and Answers for Socialized & Crowdsourced Knowledge Management

What is Viva Engage and Answers?

Viva Engage provides your company with a powerful tool that your employees can use to connect with leaders, colleagues and communities.

Answers in Viva, part of the Viva Engage experience within the Viva Suite or Employee Communications & Communities bundle, enables users to ask questions across Viva Engage – in the Answers tab and Viva Engage communities – and encourages subject matter experts to provide answers. With capabilities such as AI-driven related questions and a *personalized* feed of questions for each user; Answers in Viva helps save time and retain focus, while connecting employees to people across your Viva Engage network.



Using Viva Engage and Answers

Some of the advantages of using Answers in Viva to gather knowledge from your employees and experts include:



Stay within the flow of work by using Viva Engage , Workplace Search, and soon Copilot, to access the valuable source of knowledge that your Answers in Viva questions, answers, and conversations provide.



Answers in Viva can supercharge existing Viva Engage communities and create quick wins for new communities; by providing *trusted* answers & curated content all while building connection & collaboration between colleagues.



Subject matter experts save time by not answering the same question multiple times, while keeping an eye on personalized feeds of questions relevant to their expertise that help them support those needing *their* help.



Helping others by contributing to Answers in Viva, provides collectable rewards and recognition. Access personal analytics to see how you are helping others and your organization.



Admins can see analytics on time saved, top questions being asked, and frequency of answers. Combine with other Viva Engage analytics to breakdown themes that can inform your knowledge and socialization content.



The Intelligent Importer can scan & ingest Q&A pairs from documents and use the Answers API in MS Graph to ingest knowledge from across other systems, removing additional knowledge barriers without requiring employees to switch tools.

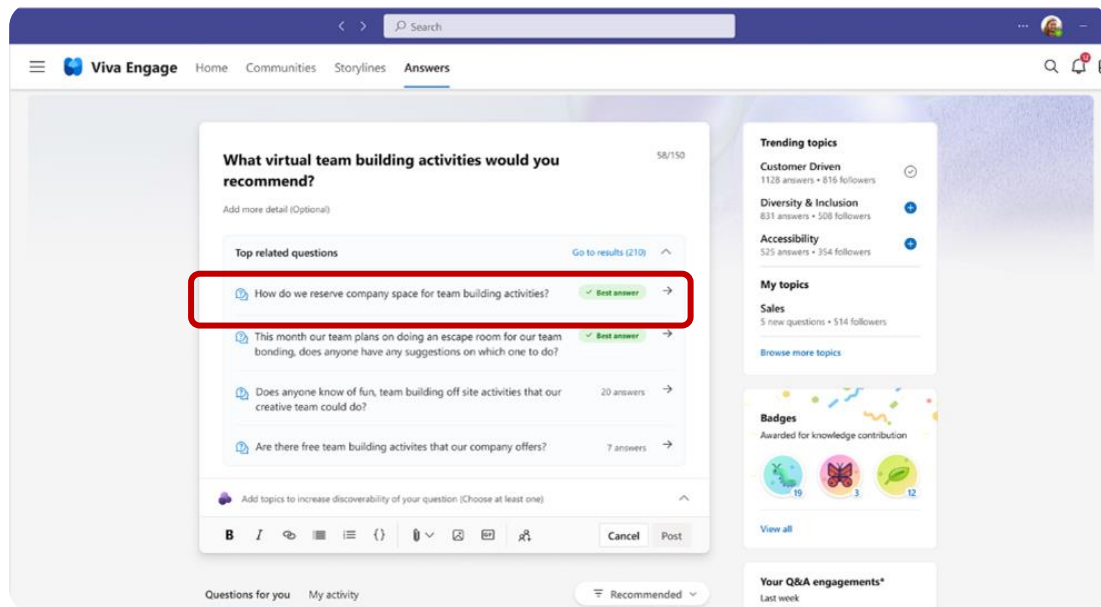
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QUESTION

Find questions that you share or can provide an answer to.

new

Surface the *newest* questions that require an answer you may already have on you.

Best answer

User votes indicate which answers are *the best*.

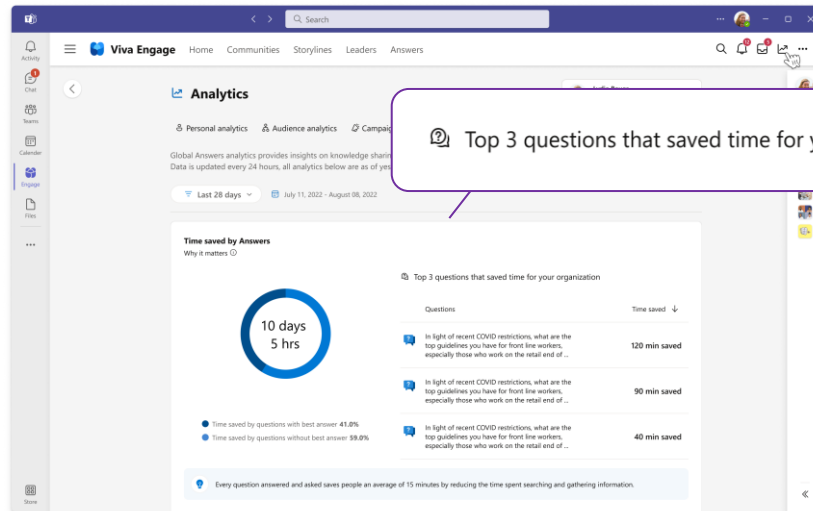
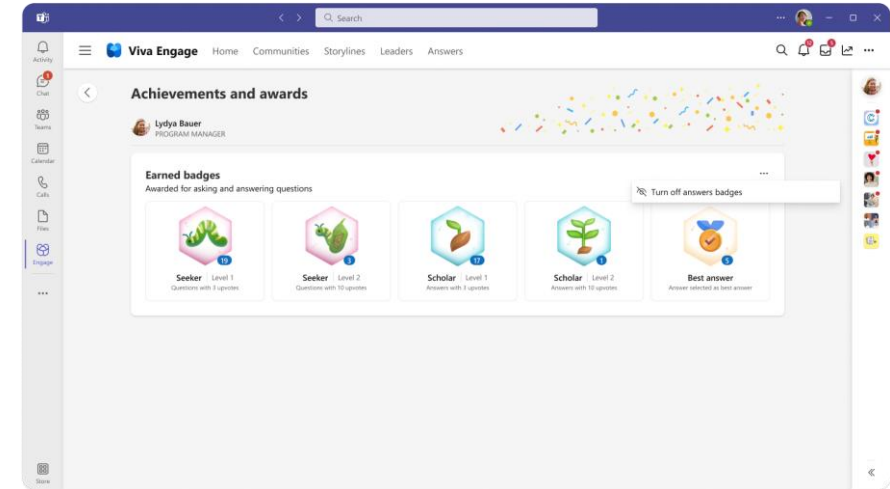
Viva Engage

Tagging helps categorize posts by *topic*, helping with context setting & discoverability.

Using Viva Engage and Answers



Helping others by contributing to Answers in Viva provides collectable rewards and recognition. Access personal analytics to see how you are helping others and your organization.



Top 3 questions that saved time for your organization



Admins can see analytics on time saved, top questions being asked, and frequency of answers. Combine with other Viva Engage analytics to breakdown themes that can inform knowledge and learning content.

Better Together

Viva Engage
with Answers



*ⓘ Consider the following apps, add-ons, and integrations to **enhance** your experience*



Surface Viva Engage conversations on your Viva Connections feed



Embed Engage feeds within your existing content management system or Intranet



Add a Viva Engage tab to a Teams channel



Use Power Automate to send RSS news to an Engage group, post tweets matching hashtags, or post from Facebook or X (Twitter)



Add a Viva Engage web-part and/or feed to your SharePoint pages.



Integrate Engage with Salesforce to deliver Salesforce CRM activity to Engage in real-time.



Add a social layer to your CRM by integrating Engage with Dynamics CRM



Create your own apps with the Yammer APIs to export & use data from Viva Engage & provide an HTTP interface for Engage Web features.

Helpful Resources



[Microsoft Viva Engage Adoption Guide \(PDF\)](#)



[Microsoft Viva Engage Advance Deployment Guide](#)



[Microsoft Viva Engage Microsoft Learn Documentation](#)



[Answers in Viva Adoption Guide \(pptx\)](#)



[Microsoft Viva Engage More Adoption Resources](#)

Customer Story



The Domino's Difference: Uniting more than 100,000 frontline workers with Microsoft Teams and Viva Engage

...Using Viva Engage, frontline workers in every market can connect with each other and the support offices, which in turn can reach every individual—to share information and updates, facilitate connections, and offer a platform to find a community—in their own language.

“Previously, all the markets were segmented, but now for the very first time, we’re opening that door, with Viva Engage” explains Amanda Mains, Corporate Communications Manager at Domino’s. [Continue Reading...](#)

“While we operate in different time zones with different languages in different countries, we are all united under the same purpose, and Viva Engage provides untapped potential for information sharing, knowledge, and inspiration.”

- Amanda Mains; Corporate Communications Manager

[Domino's](#)



Knowledge Management with Viva Learning



[Helpful Documentation](#)
[Sales & Pricing](#)

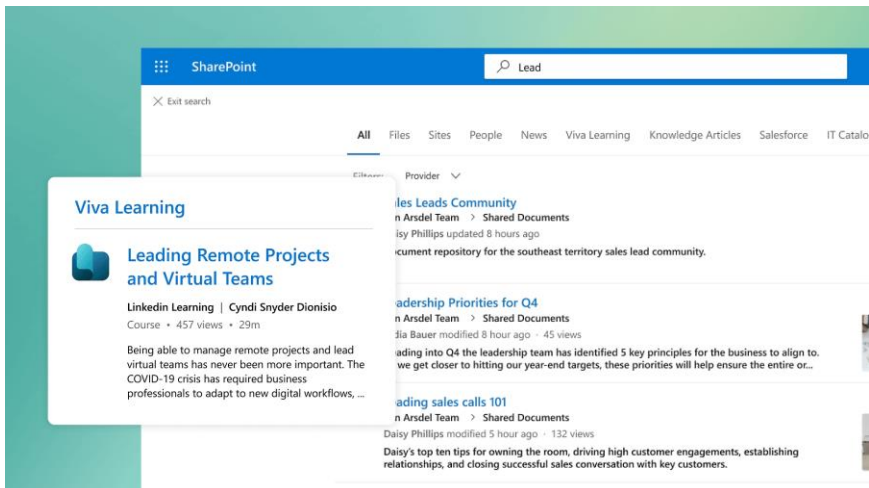
Viva Learning

for Curated & Customized Knowledge Management

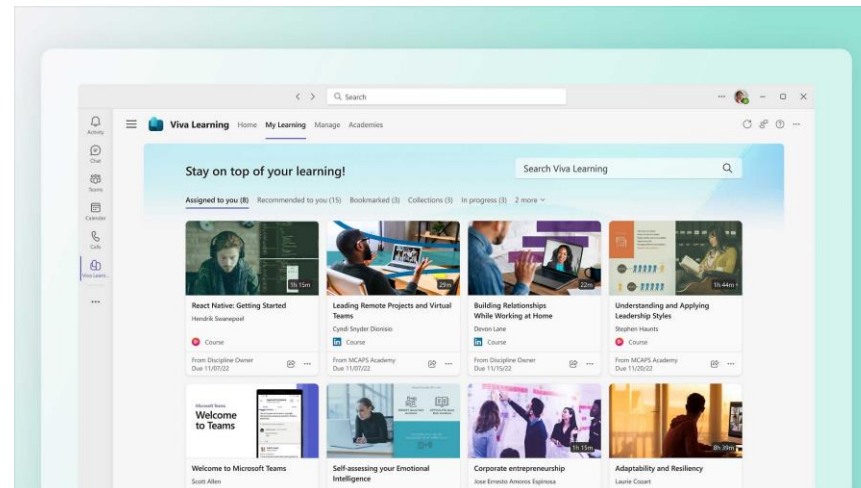
What is Viva Learning?

Built for Microsoft 365, and available through Microsoft Teams or on the Web, Viva Learning connects employees to required training & skilling content within the flow of work.

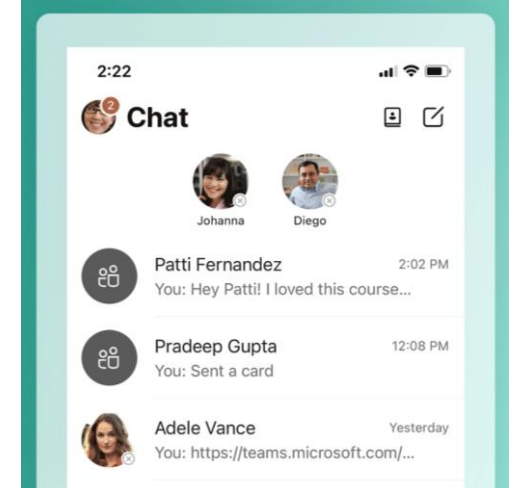
With Viva Learning; your teams can discover, share, recommend, and explore content across sources; including your LMS, LinkedIn, and many other sources, to create a learning culture at both the team and organizational levels. Viva Learning can be [purchased separately](#) or [is included with the full Viva Suite](#).



A screenshot of a SharePoint page showing the Viva Learning integration. The Viva Learning card is overlaid on the page, displaying a search bar and a list of learning content. The top navigation bar includes 'SharePoint' and a search bar with the text 'Lead'. Below the navigation, there are tabs for 'All', 'Files', 'Sites', 'People', 'News', 'Viva Learning', 'Knowledge Articles', 'Salesforce', and 'IT Catalog'. The Viva Learning card shows a search bar and a list of items, including 'Leading Remote Projects and Virtual Teams' by Cyndi Snyder Dionisio, 'Leadership Priorities for Q4' by Jia Bauer, and 'Adding sales calls 101' by Daisy Phillips.



A screenshot of the Viva Learning web interface. The page features a search bar at the top and a navigation menu on the left. The main content area is titled 'Stay on top of your learning!' and displays a grid of learning cards. The cards include 'React Native: Getting Started', 'Leading Remote Projects and Virtual Teams', 'Building Relationships While Working at Home', 'Understanding and Applying Leadership Styles', 'Welcome to Teams', 'Self-assessing your Emotional Intelligence', 'Corporate entrepreneurship', and 'Adaptability and Resiliency'. Each card shows a thumbnail image, a title, and a brief description.



A screenshot of a Microsoft Teams chat conversation. The chat is titled 'Chat' and shows a conversation between Patti Fernandez and Pradeep Gupta. Patti Fernandez has sent a message: 'You: Hey Patti! I loved this course...'. Pradeep Gupta has responded: 'You: Sent a card'. Below the messages, there is a card for Adele Vance with the text: 'You: [https://teams.microsoft.com/...](https://teams.microsoft.com/)'. The chat interface includes a search bar, a list of participants (Johanna and Diego), and a time indicator of 2:22.

Using Viva Learning

Some of the advantages of using Viva Learning to organize and share knowledge to your employees are:



Learn how to optimize productivity using Artificial Intelligence by beginning your AI training using Viva Learning.



Curate organized learning paths & collections for employees to discover, consume, and share in Viva Learning.



Enable employees to easily track learning assignments, learning collections, recently viewed & completed courses (and more) in the My Learning view.



Enable social learning using collaboration capabilities in Teams.

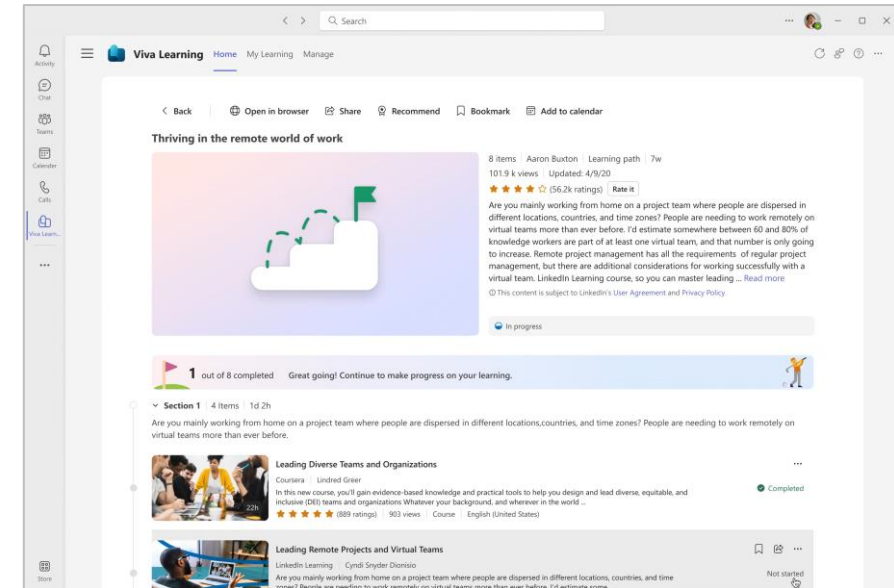
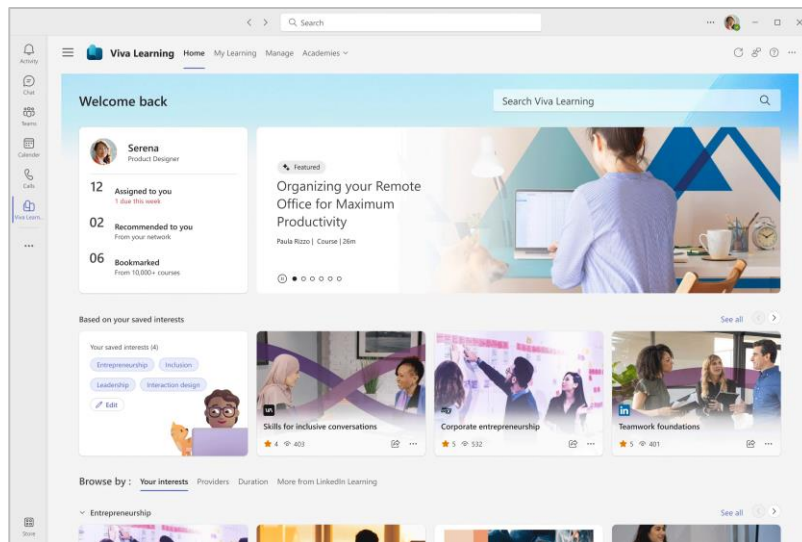


Serve relevant learning content to employees with system-generated suggestions based on their personal interests and trending content.

Using Viva Learning



Curate learning paths for employees to discover, consume, and share in Viva Learning. Employees can create learning collections for themselves or to share.

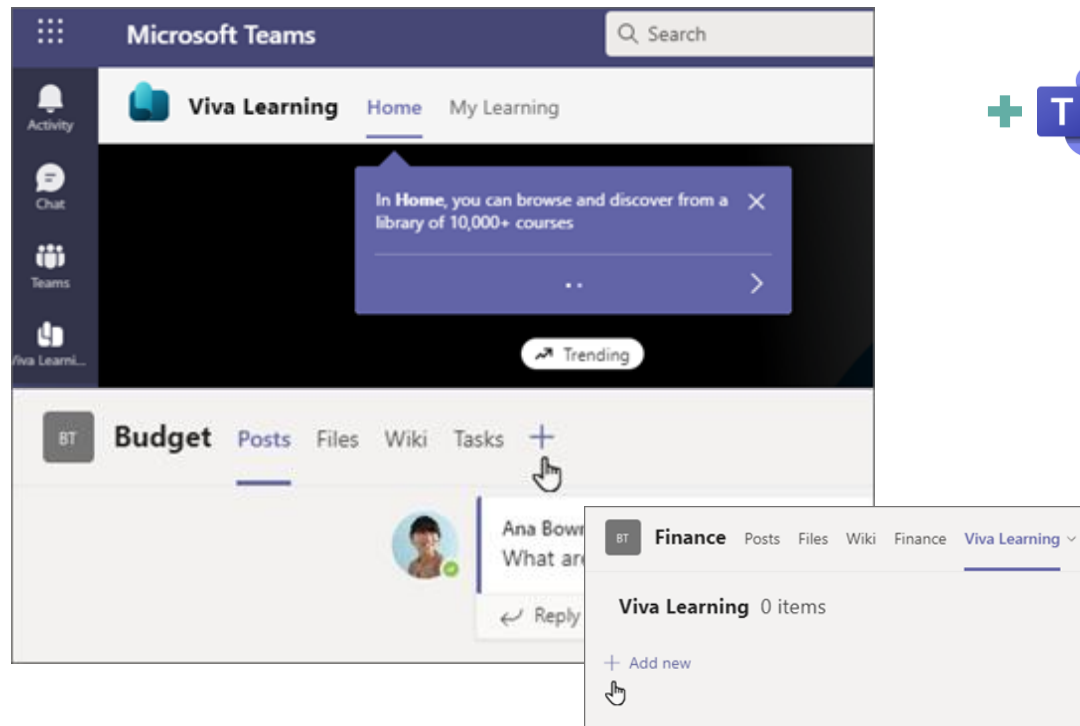


Use the My Learning view to Enable employees to easily track learning assignments and recommendations, bookmarked content, learning collections, and recently viewed and completed.

Using Viva Learning



Enhance social learning & empower collaboration by enabling the Viva Learning app in Microsoft Teams



Enable the Viva Learning app to Microsoft Teams for quick access & seamless learning.

- Add a Learning tab to your Teams channels for collaboration with members.
- Curate & pin Learning content in Learning tab on Teams channels.
- Share Viva Learning content in Teams messages or channels.

Using Viva Learning



Save employees time & energy by servicing relevant learning content to employees with system-generated suggestions based on their personal interests and trending content.

Browse Courses

Your interests Providers Duration

∨ .NET

Create microservices with .NET and ASP.NET Core

Microsoft Learning

0

power platform

< Back Your interests × Providers ∨ Duration ∨

159 results

Your interests Clear

- .NET
- Business Analysis
- Civil Engineering
- Collaboration
- Communication
- Creativity
- Cryptocurrency

Platform Foundations

Platform Administration F

2h 7m Video

- Discover engaging learning opportunities by picking and saving your interests.
- Surface learning content in your Learning Home that are *based on your interests*.
- Filter by your interests on Search results to easily show available & related Learning content.

Better Together

Viva
Learning
+

① Consider the following apps, add-ons, and integrations to *enhance* your experience



Add the Viva Learning app tab to Teams



Integrate with SAP SuccessFactors as a content source for Viva Learning



Enable the Learning tab for M365 Search to provide learning results from Office, SharePoint, and Bing Search



Integrate with Workday as a content source for Viva Learning



Connect to your existing Learning Management Systems



Integrate with Cornerstone on Demand as a content source for Viva Learning



Add SharePoint as a content source for Viva Learning



Access free Global Skilling courses from LinkedIn Learning

Helpful Resources



[Microsoft Viva Learning
Adoption Guide \(PDF\)](#)



[Microsoft Viva Learning
Advance Deployment Guide](#)



[Microsoft Viva Learning
More Adoption Resources](#)



[Microsoft Viva Learning
Microsoft Learn Documentation](#)

Customer Story

musictribe

We Empower. You Create.



Music Tribe *tunes* in to a culture of learning with Microsoft Viva Learning

...One of the most popular requests among Music Tribe employees was the ability to curate their own learning paths. "People don't want to be told what they need to learn," says Stubbs. "They want to create their own learning journeys, and Viva and Go1 have created an amazing platform for them to be able to do that."

The anytime, anywhere access that Teams provides has been another popular feature, even encouraging the company's employees to share courses with family members. "It's been really satisfying to get feedback from people who use the Viva platform to learn when it suits them, or even to help their high school or university-aged children learn new skills," observes Stubbs. [Continue Reading...](#)

"Changing organizational culture is more than hanging posters on a wall, it's about listening, engaging, and taking action."

- Amanda Mains; Corporate Communications Manager

Music Tribe



Knowledge Management with SharePoint



[Helpful Documentation](#)
[Sales & Pricing](#)



SharePoint

for Organized & Customizable Knowledge Management

What are the advantages of SharePoint?

SharePoint has long served as secure place to store, organize, share, and access information.

Here are some of the tools & advantages of using SharePoint Online for an all-up Knowledge Management strategy:



Wiki templates enable you to curate organized knowledge destinations and permission-trimming ensures that the most sensitive information is securely shared with the right people



Collaboration tools help to create a robust communication & feedback loop that captures employee tacit knowledge



Managed metadata and/or Microsoft Syntex can help further optimize organization & enhance searchability.



Automated workflows help provide useful knowledge base support tools & optimization processes

Using SharePoint



Wiki templates enable you to curate organized Knowledge Bases in SPO Sites & Pages

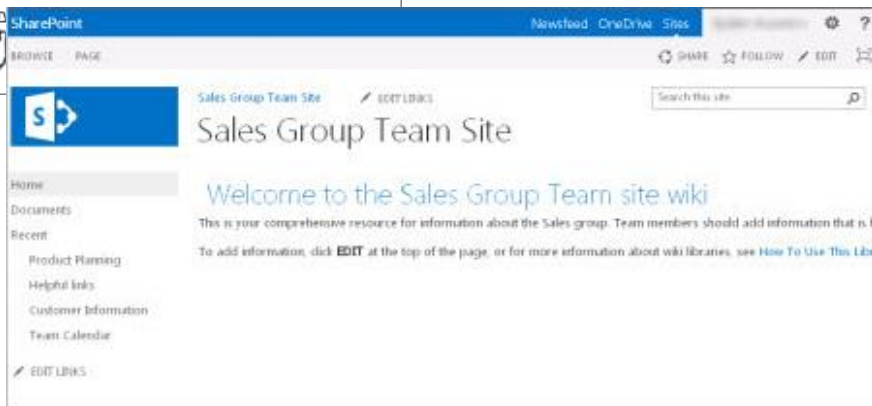
Site Contents · Your Apps

wiki

1 app matches your search [Newest](#) [Name](#)



Wiki Page Library
App Details



On a large scale, you can share large volumes of information in an Enterprise wiki. On a smaller scale, you can use a team site as a wiki to gather and share ideas quickly about a project.



permission-trimming ensures that the most sensitive information is securely shared with the right people

Using SharePoint



Taxonomy & adding additional custom columns to the Site Pages Library will improve Searchability of knowledge

The screenshot shows a SharePoint library view with a list of documents and a 'Refine by tag' filter. The document list includes:

- [Frequently Asked Questions: Worm Gears](#)
common technical questions about the different by Authors: Vladimir Egorov Date: 3/15/2010 Size: http://contoso05/Engineering/TechnicalPublication/Drives.docx
- [Frequently Asked Questions: Ring Gears](#)
common technical questions about the different by Authors: Vladimir Egorov Date: 3/17/2010 Size: http://contoso05/Engineering/TechnicalPublication/Drives.docx
- [Product Line Comparison: Worm Gears](#)
All Materials 1456789-9876-4321-9999-8888

The 'Refine by tag' filter is set to 'Sort: Alphabetically | By Size' and shows the following tags:

Ad campaigns Brochures Campaign
analysis Conferences Forecasting I like it
Metrics Return on Investment Strategic
Planning



Collaboration tools help to create a robust communication & feedback loop that captures employee tacit knowledge

The screenshot shows a SharePoint channel interface for 'Mark 8 Project Team - Architecture'. The channel name is 'Mark 8 Project Team - Architecture'. The channel actions are:

- + New
- Upload
- Copy link
- Sync
- Go to channel**
- ...

The channel actions are displayed in a dropdown menu with the following options:

- Channel notifications
- Pin
- Hide
- Manage channel
- Get email address
- Connectors
- Leave the channel
- Open in SharePoint**

Using SharePoint



Use SharePoint with Power Automate to build knowledge base supporting workflows

Search connectors and triggers

Triggers Actions Help

- When an item is created SharePoint
- When an item is created or modified SharePoint
- When a file is created in a folder SharePoint
- For a selected file SharePoint
- For a selected item SharePoint
- When a file is classified by a content understanding model SharePoint
- When a file is created (properties only) SharePoint
- When a file is created or modified (properties only) SharePoint
- When a file is deleted SharePoint
- When a site has requested to join a hub site SharePoint
- When an item is deleted SharePoint

Search connectors and actions

Triggers Actions Help

- Add attachment SharePoint
- Approve hub site join request SharePoint
- Cancel hub site join request SharePoint
- Check in file SharePoint
- Check out file SharePoint
- Copy file SharePoint
- Copy folder SharePoint
- Create file SharePoint
- Create item SharePoint
- Create new folder SharePoint
- Create sharing link for a file or folder



Admins can automate SharePoint page approvals with PowerApps, to create an authoritative process.

Create a page approval flow

Submit SharePoint page for approval
By Microsoft

Flow name
Submit SharePoint page for approval

Approvers *
ML <approver> X

Create

Flows

My flows Team flows Business process flows

	Name	Modified	Type
	Submit SharePoint page for approval	1 min ago	Instant

New Item

New page name:
New page for testing page approval

Find it at: https://netorg-cid>_sharepoint.com/SitePages/New%20page%20for%20testing%20page%20approvals.aspx

Create Cancel

Status: Waiting for approval

Using SharePoint Premium



Experts can curate repositories for a specific use, [and use the many tools in SharePoint Premium](#), to optimize organization & searchability, while increasing employees trust that the information is authoritative. Read more about the evolution of Microsoft Syntex to Microsoft SharePoint Premium here [in this blog post](#).



[Use unstructured document processing to automatically classify documents and extract information from them](#). It works best for documents that vary in composition, such as letters or contracts. This model type supports the widest range of file types.



[Microsoft 365 Archive \(Preview\) is a cost-effective, long-term storage solution for inactive or historical data in SharePoint](#). Because the data is archived in place, the content retains Microsoft 365 security, compliance, search, and rich metadata.



Use a [prebuilt model](#) to save time processing and extracting information from [contracts](#), [invoices](#), or [receipts](#). Prebuilt models are pretrained to recognize common business documents and the structured information in the documents.



[Use taxonomy tagging to find and manage terms in SharePoint document libraries](#). Automatically tags documents with terms or terms sets configured in your taxonomy store using AI. These terms are stored in a managed metadata column, making the documents easier to search, sort, filter, and manage.

Helpful Resources



[Overview of SharePoint Premium](#)



[SharePoint Premium Adoption Guidance](#)



[SharePoint Premium More Adoption Resources](#)



[Microsoft SharePoint Microsoft Learn Documentation](#)

Customer Story

TOYOTA



Toyota Motor Europe: Building a happier workplace by putting people first

...To do this, they used Microsoft SharePoint to establish a broader community. “We established the Know It community, a portal on Teams and SharePoint where people can find key information about the Microsoft 365 tools with FAQ's and videos,” says Slabbinck. “It’s a space for employees to ask questions and for our digital influencers to contribute and guide people.” “

We used Microsoft reporting tools to look at data from users and the influencers, to think of ways to enhance engagement,” says Dröge. [Continue Reading...](#)

“This has brought our IT&D, HR and Administrative functions closer to focus on collaboration, open sharing and innovation.”

- Kylie Jimenez;
Sr. Vice President of People, Technology and Corporate Affairs
[Toyota Motor Europe](#)



Enhance Knowledge Management with

Skills in Viva, People in Viva, LPC

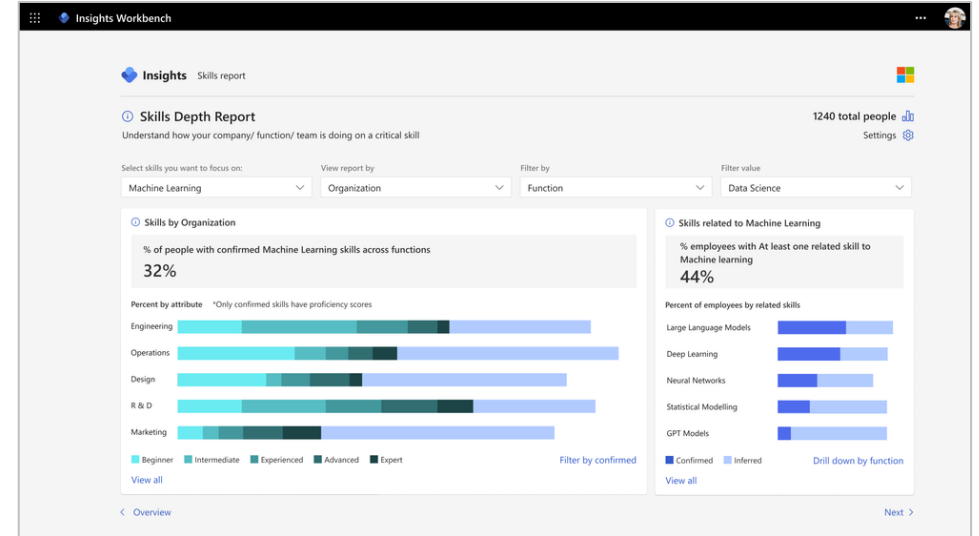
Profile Cards, & Loop

Skills in Viva



Skills in Viva is an AI-powered service that delivers personalized skills-based experiences throughout supported Microsoft 365 and Viva applications for employees, business leaders, and HR.

The screenshot shows the Microsoft Viva Skills profile for Cameron, a Senior Project Manager. The interface includes a navigation sidebar on the left with options like Viva, Amplify, Connections, Engage, Drive, Glance, Insights, Learning, and Pulse. The main content area features a welcome message, a search bar for adding skills, and a 'Skills profile' section with the tagline 'Excel in your role'. Below this, there's a notification about completing Agile Coach training. The 'Trending skills in Relecloud' section displays three skill cards: 'Large Language Models' (435 colleagues), 'Security controls' (326 colleagues), and 'Python' (225 colleagues). A 'Suggested skills' section lists various skills with toggle switches, such as Stakeholder Management, AI Ethics, Problem Solving, Market Research, Planning, Critical Path Method (CPM), Machine Learning, Natural Language Processing, Business Operations, Program Management, Account-Based Marketing, and Data Modeling. At the bottom, there's a section for 'All your skills' explaining visibility settings.

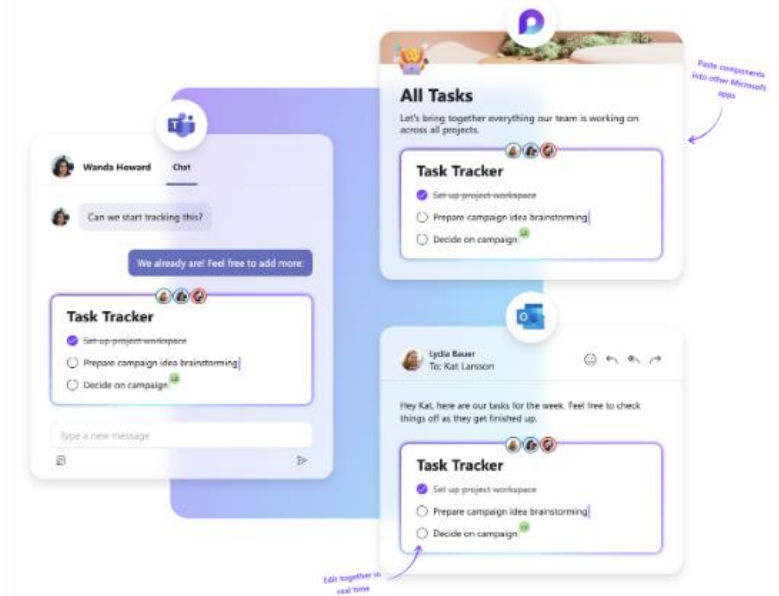
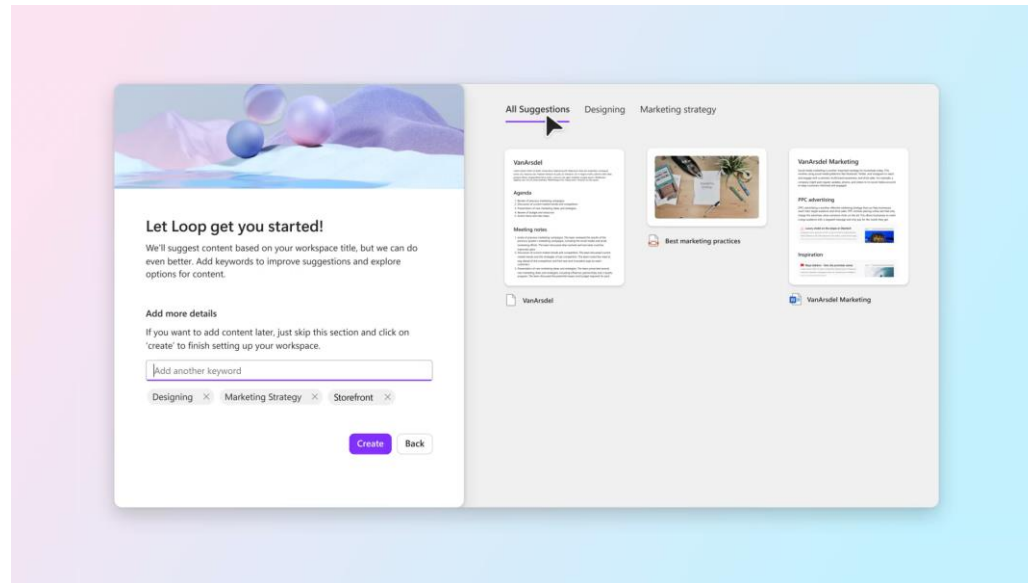


Skills in Viva generates skill inferences from various sources, such as emails, documents, meetings, chats, top contacts, LinkedIn & more

Microsoft Loop



Enable a common view of knowledge between team members with different components that sync across their Microsoft 365 apps in real-time.



Save time by starting off right. Loop can find the most relevant files and documents for your new workspace, or use templates to enable users to co-create and organize knowledge,

People in Viva & Profile Cards (LPC)



People in Viva, with Org Explorer, helps you visualize and explore your company's internal structure, its teams, and people and is available to enterprise users with a Microsoft Viva license.

Selecting someone's name or picture in Teams, Outlook, or other Office apps and services, will help you find information related to them on their profile card.

The screenshot shows the Viva Org Explorer interface. Callout 1 points to the search bar at the top. Callout 2 points to the list of people reporting to the selected manager. Callout 3 points to the 'People reporting to Wanda Howard' section. Callout 4 points to the 'View profile' button for Wanda Howard. Callout 5 points to the 'Expand team' toggle. Callout 6 points to the 'Expand team' toggle. Callout 7 points to the 'Works with' section at the bottom.

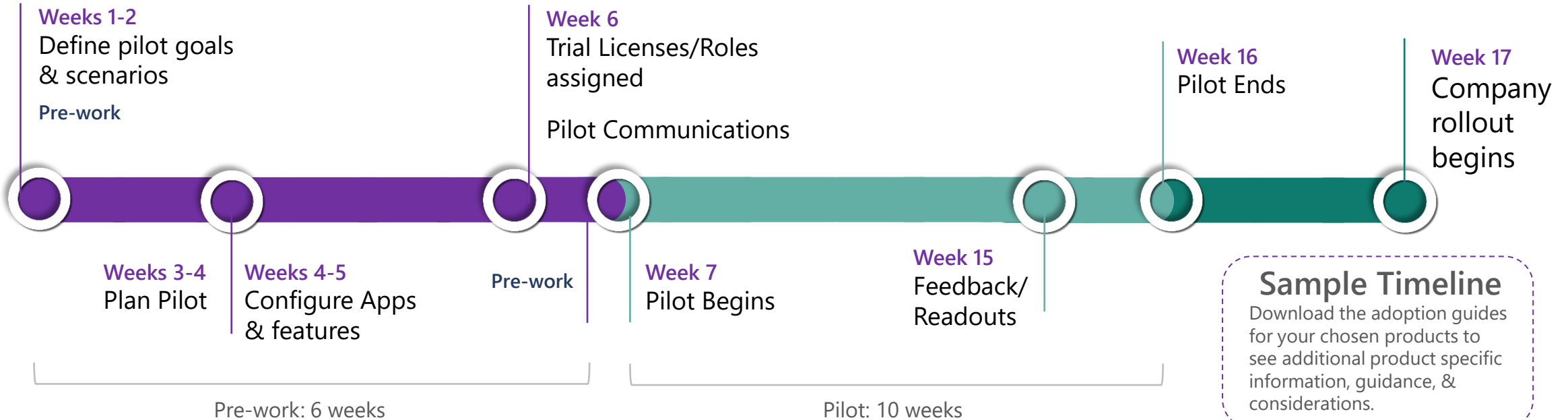
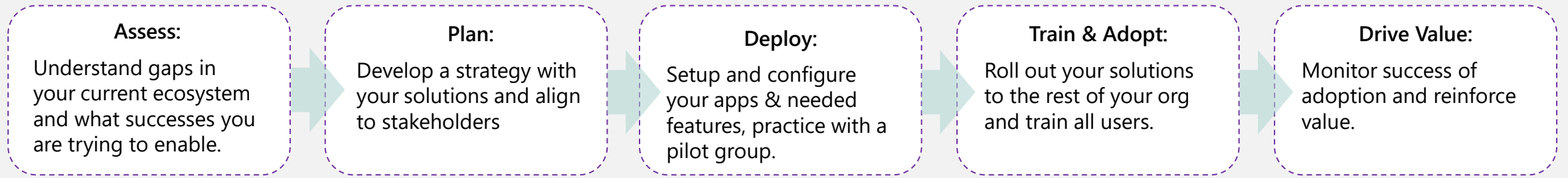
#	Element	Function
1	Search	Type a person's name or alias and select from the suggestions that appear.
2	Manager chain	The manager chain shows all the managers above the person in focus. The number of reports will show to the right of the person. You can hover over the number to view both direct and indirect reports.
3	Peers	Peers are people who report to the same manager as the person in focus. If the peer has people reporting to them, the number of reports will show. You can hover over the number to view both direct and indirect reports.
4	Person in focus	When you select a person in Org Explorer, the page displays org information about them. For example, contact information, who their manager is, people reporting to them, and who they collaborate with. You can also select View profile to view their profile card .
5	People reporting to	People reporting to the person in focus are listed in the section below the person.
6	Expand team	Use the toggle to show/hide next-level reports and expand teams.
7	Works with	The people in the Works with section represent people who are relevant to or working with the person in focus . The relevancy is based activities like in-common meetings, emails, and other collaboration patterns.

The screenshot shows a profile card for Courtney Rees. It includes a profile picture, name, and contact information (Send email, Start chat). Below the profile information, there are sections for 'Today', 'This week', and 'This month', each containing a list of people and their roles.

Designing Your Strategy

More info & thought exercises

Adoption Planning



Define Success Criteria



Define goals

- What are you trying to accomplish?
- What does success look like?
- i.e., increase engagement with learning, accelerate onboarding, train sales and service teams, enable upskilling across roles



Identify key performance indicator (OKRs)

These should improve based on adoption and will show leadership the impact of your solutions



Establish OKR benchmarks



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

Download the adoption guides for your chosen products to see additional product specific tips, guidance, & nuances

Scenario Worksheet



- Poor knowledge socialization
- Low Sharing
 - Low Collaboration



- Poor knowledge organization
- Knowledge loss
 - Knowledge silos



- Difficult Knowledge Discovery
- Convoluted process
 - Too many/lack of knowledge destinations



- Low employee time/motivation
- Poor incentives to adopt
 - Time-consuming/disruptive process



Microsoft 365 Copilot

- AI powered assistant
- Microsoft 365 Chat
- Integrated across M365 apps
- Integrated across Viva Suite



SharePoint

- Microsoft Syntex add-ons
- Customizable wiki's
- Rules & PowerApps workflows
- Viva web-parts
- Copilot integration



Microsoft Viva Suite

- + Skills in Viva
- + People in Viva



Viva Engage

- Knowledge Socialization platform
- Answers in Viva
- Teams integration
- SharePoint web-parts



Viva Learning

- Learning curation & collection platform
- Access external sources
- Teams integration
- SharePoint web-parts



Tip: Teams integrates with each of the apps in this guide. Try to use Teams in all of your scenarios.

As someone in...
[department/team]

I would like to solve...
[KM challenge]

Using this feature...
[feature name]

Within this product...
[product name]

Integrated with...
[product/feature name]

I know I'm successful when...
[solution success measure]

Stakeholder R&Rs

Sample roles and responsibilities for running a successful Knowledge Management pilot. Business units, HR and IT departments should work in tandem to evaluate both technical capabilities as well as company fit and understand the employee experience through using Viva Topics.

<u>Role</u>	<u>Responsibilities</u>
Knowledge Program owner	Lead development of organization's knowledge strategy, deliver on objectives and champion knowledge discovery across organization. Responsible for planning pilot and determining what feedback/metrics to collect, identifying pilot participants and where to test. Must be familiar with products, internal learning, and company structure to inform rollout plan.
Knowledge managers and champions	Responsible for managing knowledge, encouraging knowledge contribution, monitoring creation of new knowledge. Identify top organization knowledge that requires more governance and assist IT Admin to identify sensitive sites, information, & users to exclude from project.
Project manager: communications	Responsible for writing communications/emails, creating and sending communication assets.
Project manager: feedback	Responsible for running discussion groups and surveys, gathering feedback
IT Lead	Responsible for purchase decision for new technology
IT administrator	Responsible for configuring apps for pilot group



Download the adoption guides for your chosen products to see additional product specific tips, guidance, & nuances

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.



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Adoption Resources



 Microsoft 365 Copilot	 Microsoft Viva Engage	 Microsoft Viva Learning	 Microsoft SharePoint
<u>Microsoft Adoption hub</u>	<u>Microsoft Adoption hub</u>	<u>Microsoft Adoption hub</u>	<u>Microsoft Adoption hub</u>
<u>Microsoft Copilot Adoption Kit (download)</u>	<u>Viva Engage Adoption Guide</u>	<u>Viva Learning Adoption Guide</u>	<u>SharePoint Training for IT Pros</u>
<u>Microsoft Copilot Adoption Workbook</u>	<u>Answers in Viva Adoption Guide</u>	<u>Viva Learning Pilot Guide</u>	<u>SharePoint Training for End-Users</u>
<u>Microsoft Copilot Rapid Adoption Guide</u>	<u>Viva Adoption Project Template</u>	<u>Viva Adoption Project Template</u>	<u>SharePoint Look-Book</u>
<u>Microsoft Copilot Productivity Gains</u>	<u>Viva Engage Analytics</u>	<u>Viva Learning Analytics</u>	<u>SharePoint Envisioning & Value Realization</u>
<u>Microsoft Copilot User Help & Learning</u>	<u>FastTrack Self-Service Deployment Guide</u>	<u>FastTrack Self-Service Deployment Guide</u>	<u>SharePoint Live & On-demand Training</u>