

Adoption Recommended Practices from successful Viva Connections customers

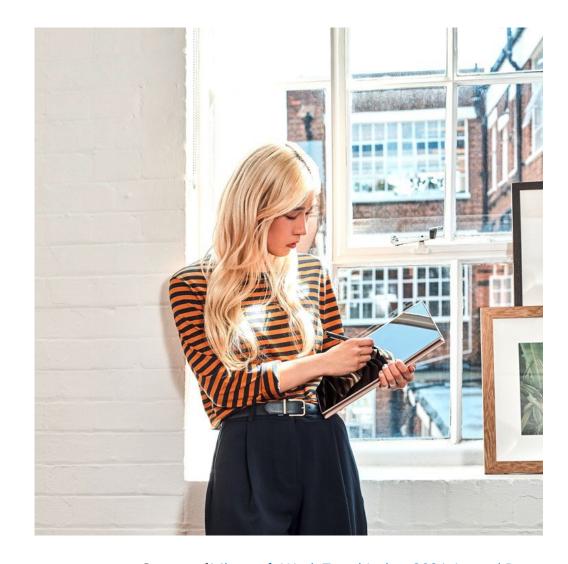


Introduction

Viva Connections is the hub of the Viva Suite and entry point to Microsoft's Employee Experience vision. As Hybrid Work trends become more durable, 73% of employees want flexible remote work options to stay¹; 80% of leaders say they plan to make major changes to their flexible work policies¹; and yet 67% of employees want more in-person work or collaboration post-pandemic¹.

Microsoft Viva Connections aims to help organizations bring into employees' hands the wealth of Employee Experience scenarios provided by the Viva suite. By enabling a seamless, common experience across Teams (desktop and mobile) and the web, and by catering to both Information Workers and Front-line Workers, Viva Connections empowers employees wherever they are and engages them with the company's culture and messages, as well as with their colleagues.

This guide has been created for organizations looking to learn what makes for high-engagement Viva Connections deployments. It will share examples and recommended practices from customers worldwide who have deployed Viva Connections and assembled teams to manage it, and have achieved deep and successful use of the product as well as increased satisfaction from their users.





Audiences for this document



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



- Business stakeholders looking to revitalize their organization's Employee Experience (including, but not limited, to HR and internal comms teams).
 - · Also the person (or persons) made accountable by the business stakeholders to achieve maximum satisfaction of the Employee Experience. In this document, we will call this person the **Employee Experience Lead.**



Viva Connections: The mobile hub for your organization's Employee Experiences

Dashboard

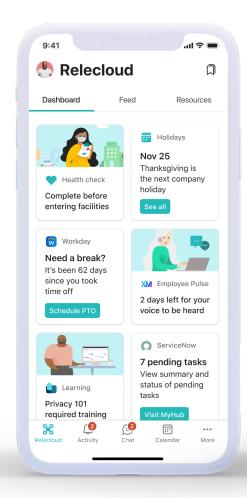
Complete tasks and focus on critical information

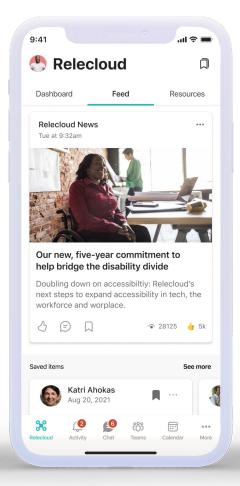
Feed

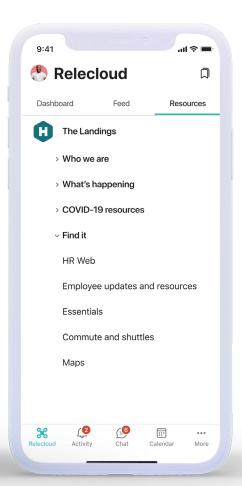
Discover and engage with news and conversations

Resources

Find what you need across your digital workplace









The gateway to the desktop employee experience

Bring together Dashboard, Feed, & Resources on desktop, aligning to the mobile IA

A gateway to discover & access Viva modules

Easily access your home site via a direct link

Provide substantially shorter time to value with an out of the box experience

Enable broader adoption among customers with frontline workers and other customers who don't have intranets

You can find more info about Viva Home here.

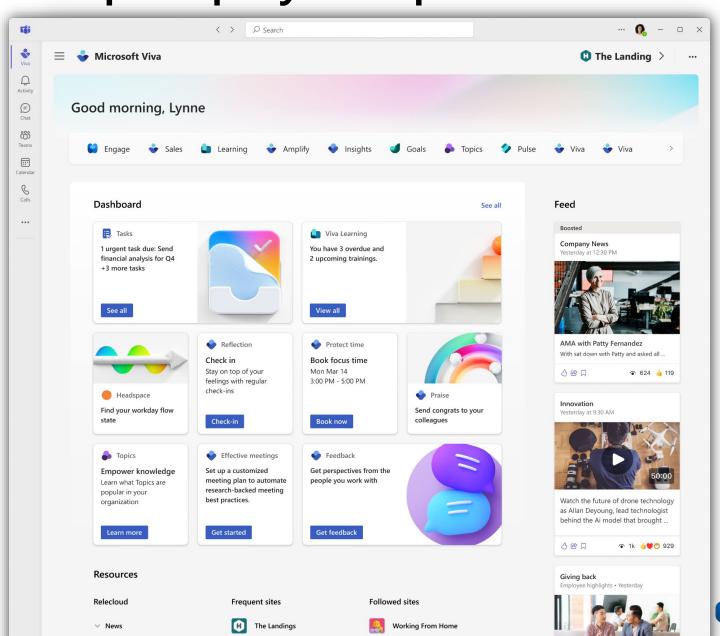




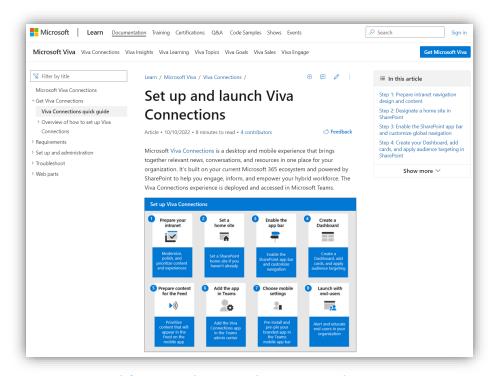
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 - Keep the Feed fresh and compelling.
 - Prioritize the mobile experience.
 - Pin... but only at the *right time*.
- Helpful Resources

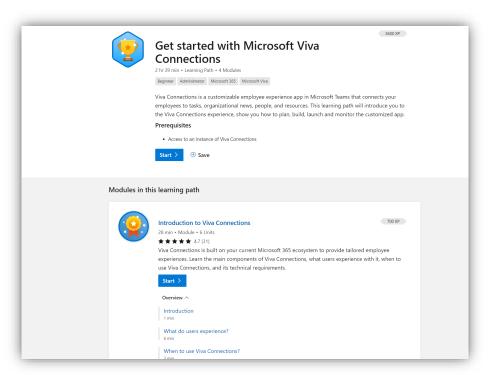


Resources for Planning your Deployment

You have several resources available to plan for your Viva Connections deployment. The following pages will list the main ones.



<u>Guide to setting up Viva Connections, at the docs.microsoft.com site.</u>



Get started with Viva Connections Learning Path at the learn. Microsoft.com site.



Be sure to review and understand the adoption recommendations detailed in this document (especially around resource planning) before you begin the deployment phase. Planning for high engagement might entail modifying your expectations or development work around Adaptive Card Extensions, Feed news posting processes, and more.



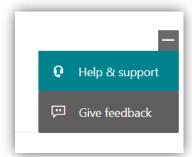


Advanced Deployment Guides

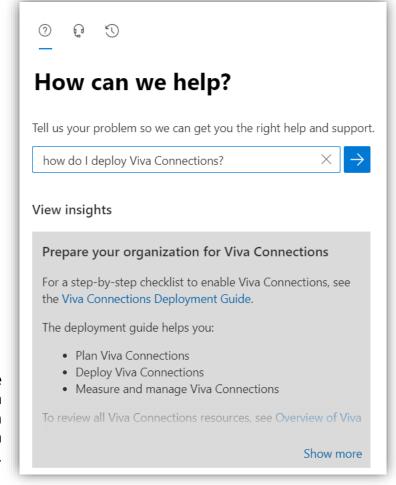
A new way to plan and execute your deployment

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 the **Help & Support** button on your M365 Admin experience...



... and search for the Guide you're looking for using a plain text search. Here is an example for Viva Connections.



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

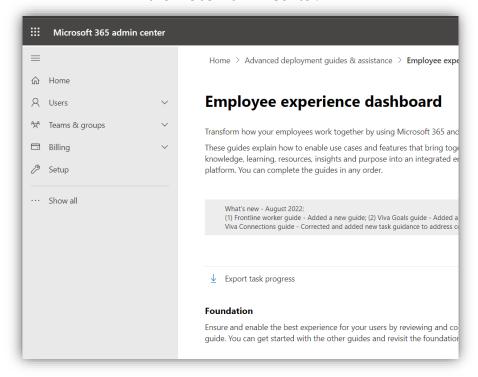




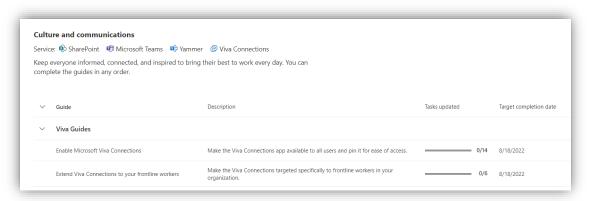
Advanced Deployment Guides

A new way to plan and execute your deployment

The Employee Experience dashboard within the M365 Admin Center.



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



The two Advanced Deployment Guides currently available for Connections: *Enable Microsoft Viva Connections* and *Extend Viva Connections to your frontline workers*.

ect one of the tasks to get start ask doesn't apply to your enviro		ınder Update your progress . Select Not applica	ble it	
ask	Priority	Assigned to	Due date	Update your progress
customize the Viva connections app	Required	Enter a name or email address	Wed May 25 2022	○ Not Started ∨
et up Viva Connections ashboard and feed	Recommended	Enter a name or email address	Wed May 25 2022	O Not Started
oll out Viva Connections	Required	Enter a name or email address	Wed May 25 2022	○ Not Started ∨
et up Viva Connections app ackage for Microsoft Teams	Optional	Enter a name or email address	Wed May 25 2022	O Not Started
Measure adoption and ngagement	Recommended	Enter a name or email address	Wed May 25 2022	O Not Started



Adoption Recommended Practices from successful Viva Connections customers

- 1. Plan and resource your team for a weekly usage cadence.
- 2. Identify and build cards for your employees' high-value scenarios.
- 3. Keep the Feed fresh and compelling.
- 4. Prioritize the mobile experience.
- 5. Pin... but only at the *right time*.

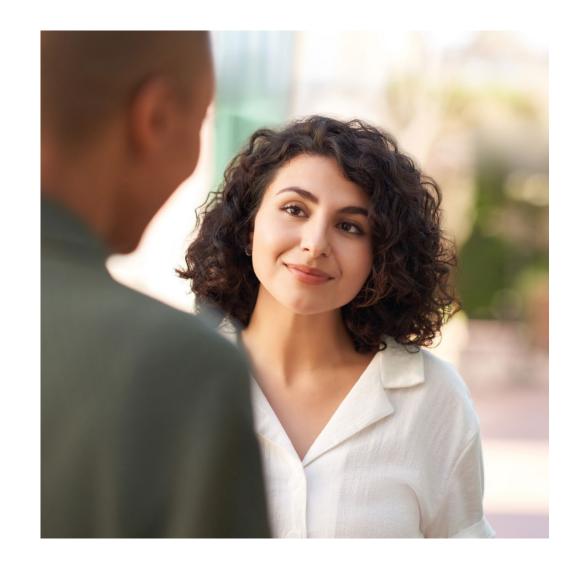
Recommended Practices for Connections High Engagement success

Viva Connections is the hub of the Employee Experience. Wouldn't you expect it to be used frequently?

Since before the product launched, the Viva Connections Engineering team has worked with 30+ Early Adopter Program customers, and has collaborated with FastTrack, our Field teams, and our partners in hundreds of additional engagements. These are customers from different geographies, industries, and with different sizes. Some of the questions explored were:

- What deployment, development, and adoption strategies translated into deeper, more stable use of Viva Connections?
- How were the various features of Viva Connections used to provide value and lasting engagement for users?
- What are the pitfalls that these customers avoided or, in hindsight, would have liked to avoid?

The rest of this document will summarize the resulting recommendations. The main conclusion: **High user engagement** is the secret to Viva Connections success.





Five Adoption Recommended Practices from successful Viva Connections customers



Plan and resource your team for a weekly usage cadence.

2

Identify and build cards for your employees' high-value scenarios.

3

Keep the Feed fresh and compelling.

4

Prioritize the mobile experience.



Pin... but only at the *right time*.



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

What is Engagement?

Engagement can be understood as an indicator of the degree of usefulness of Viva Connections to your employees.

- Early customer feedback suggests that <u>once-per-week or greater</u> engagement is a good reflection of these behaviors.
- The upcoming Viva Connections Analytics (<u>roadmap link</u>) will allow you to analyze the engagement of your users by presenting, among others, the following data points:
 - Unique Active Users: The total number of individual viewers across all Viva Connections platforms.
 - Unique Engaged Users: The total number of individual viewers who interact with Viva Connections experiences
- · These two data points will be shown:
 - For the last 7 days (~ "weekly")
 - For the last 28 days (~ "monthly")

On average, how frequently do you expect one of your employees to:

- Prepare an expense report?
- Check the cafeteria menu?
- Review their paycheck?
- Present a health insurance claim for their family?
- Ask for sick leave or vacation?
- Request IT or building facilities help?
- Take up a learning or skilling class?
- Give or provide feedback to others?
- Review their work shift (for multi-shift employees)?



Employee Experience Lead: How can you track and measure the success of their Connections engagement strategy?

For a healthy, high-impact Connections implementation, aim to keep these values as close as possible:



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



Deep, engaged usage of Viva Connections 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.



Is Viva Connections a replacement for your Intranet?

While Viva Connections shares many aspects in common with an intranet, there are two differentiating factors:

Viva Connections is the hub and entry point to the company's employee experience. While there is overlap with an intranet, the intranet has several purposes beyond the employee experience.

Connections' Dashboard and Feed have been designed with a high degree of engagement in mind. The ideal Connections experience requires a more frequent update cadence than a typical intranet.

The intranet is automatically included as a core ingredient in Connections via the Resources tab, which provides an audience-targeted view into the existing intranet experience.

That second point is very important. Just like a team of editors and reporters is needed to keep a news site's content fresh and value-infused, your **Employee Experience lead** (or similar role) needs to identify top employee experiences scenarios, implement them via value-infused ACE cards, keep the beat of the Feed moving forward, and continue refreshing cards and content in response to employee feedback and seasonal activities.

The questions to address at this stage are: Does this role exist? Have they been assigned the right resources to ensure your engagement goals?



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

Designing a Viva Connections implementation that will achieve sustained weekly engagement introduces additional considerations to consider in the planning phase.

- Adaptive Card Extensions (ACE Cards): What daily/weekly value are your users expecting from the cards? Have you identified (or developed) the right cards to provide it? What is your plan for gathering card feedback and responding to seasonal updates?
- Feed News and other data sources: What will be your publishing and news refresh frequency? How will you keep it up?

The next sections will provide recommendations on how to address these challenges. At this stage the most important thing is to answer this question: Who's going to do all this work during and after deployment? Who within your organization is accountable for this degree of engagement?

Work with your business stakeholders to ensure an Employee Experience Lead is resourced from the planning phase onwards. Have a person or team assigned and resourced to explore these questions, plan for the appropriate solutions, implement them, and guide the process going forward.

Plan and resource the continuous adoption process with weekly outcomes in mind and multiple activities per week.

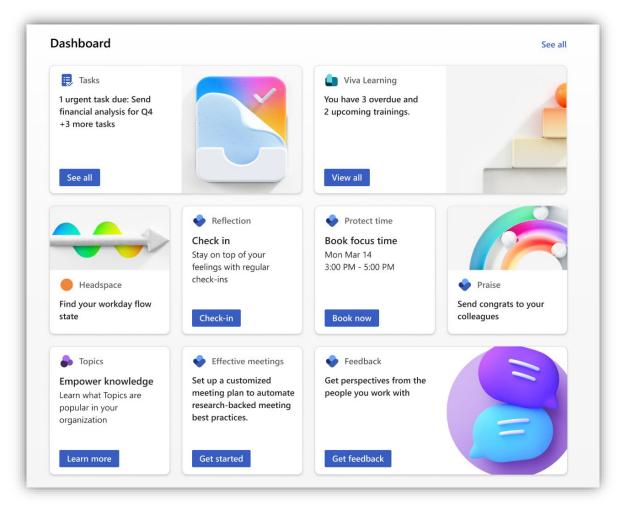
Leverage the upcoming Viva Connections Analytics feature to set and track targets for deep usage and engagement of Connections.





Adaptive Card Extensions (ACE) are critical to achieving satisfying employee experiences for users within Viva Connections. ACE Cards are self-contained sets of features that allow user to interact with specific company features, processes and day-to-day needs. The upcoming Viva Home experience within Viva Connections will help bring these cards to the front and center.

Microsoft provides a broad set of <u>first-party ready-to-run cards</u> including Tasks, Shifts, Top News, and more, as well as cards for other Apps in the Viva Suite. In addition, <u>integration cards for a broad set of partners</u> are available or announced. Finally, it is possible to <u>build your own</u>, leverage dozens of samples at the <u>Viva Connections sample solution gallery</u>, or take advantage of the <u>Viva Connections sample app</u>.





Q: What is the "winning" Viva Connections card that achieves high engagement?

A: Viva Connections isn't 'one size fits all.' Different customers have different needs, cultures, processes and tools, which is why the Employee Experience lead needs to analyze users' needs and expectations for value before deciding on what cards to use.

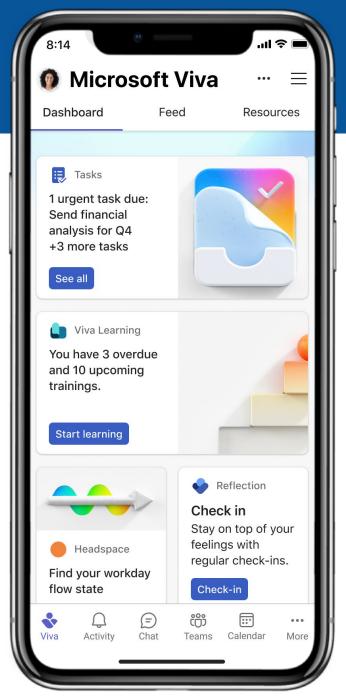


Top dashboard-use customers have many high-value cards!
Dashboards with 10+ cards covering multiple user needs have 3x the engagement of those with <5 cards.

- There are some broad patterns, which you should validate for your employees. For example, companies with Frontline Workers see value from custom "Working Shifts," "PayCheck Update," and "Daily Cafeteria Menu" cards.
- Another pattern: employees click far more in "me" cards (my paystub, my bonus, my vacation, my insurance claims, even my lunch menu) than in "company" cards (today's tasks, sales app links, etc).
- High-value cards may have a seasonality. For example, does your company have a yearly bonuses or vesting month? Donation matching period? Benefits/insurance registration period? These are all opportunities for seasonal high-value cards.
- Don't overdo it either! Too many cards increases user overload and confusion, and fosters disengagement.
- · After setting up Feed strategy (next section): Leverage the Top News card.
- Have you set up a user feedback process (or user group) for dashboard feedback and high-value cards strategy course correction?



The Employee
Experience
lead should be
accountable
for identifying
opportunities
to increase
card
engagement
and value,
including
seasonality.





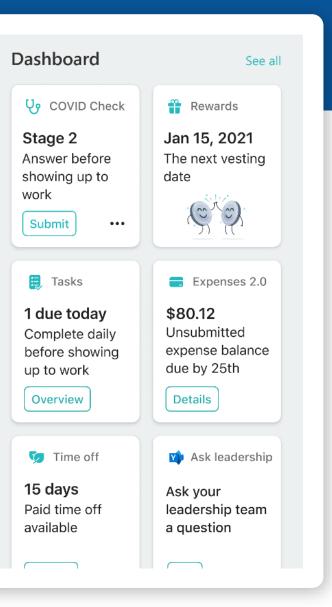
In order to build an effective Viva Connections Dashboard, start by identifying your users' high-value scenarios. What do they need most? Having access to what action would save them the most time? What actions do they do most frequently or expect to have at their fingertips? Can you confirm that if those employee experiences were available in the dashboard, your users would use them frequently?

Once you know your users' preferred actions and scenarios, and the value they expect to get from Connections, identify the cards or sets of cards that fulfill that functionality:

- Do the <u>first-party, ready-to-run cards</u>, fulfill these goals? Then use these first.
- Do <u>third-party ISV cards from partners</u> address these needs? Explore obtaining them and connecting them to your internal ISV systems.
- Can your value scenario be solved (with value) simply by leveraging the <u>Adaptive Cards Card Designer</u>? (The card designer is also a great quick prototyping tool to communicate a vision to SPFx developers).
- Do you need to <u>build your own custom cards</u>? Involve your development teams or partners, leveraging the <u>Viva Connections sample solution gallery</u> and the <u>Viva Connections sample app</u>.

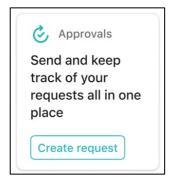


A large manufacturing customer used **User Centered Design**processes to map and understand personas within the organization, and what was important to them. They leveraged surveys and listening sessions, and mapped their Connections needs to the feedback from these groups of users.

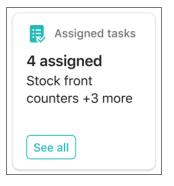




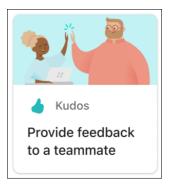
Some <u>first-party cards</u> that are currently available.



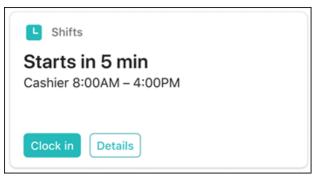




Assigned Tasks



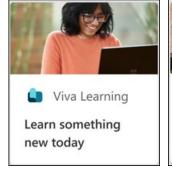
Teams App



Shifts











Top News Web link Viva Learning



Take advantage of the broad ecosystem of partners supporting Viva Connections via custom cards.

- Work with seamless integration with many of the leading apps and services
- Easily extended to integrate with existing internally created applications
- Connects to other Microsoft 365 and Microsoft Viva apps and services with a few clicks

Review the full list of available integrations <u>here</u>.





Q: Are Web link cards the best conduits for high engagement?

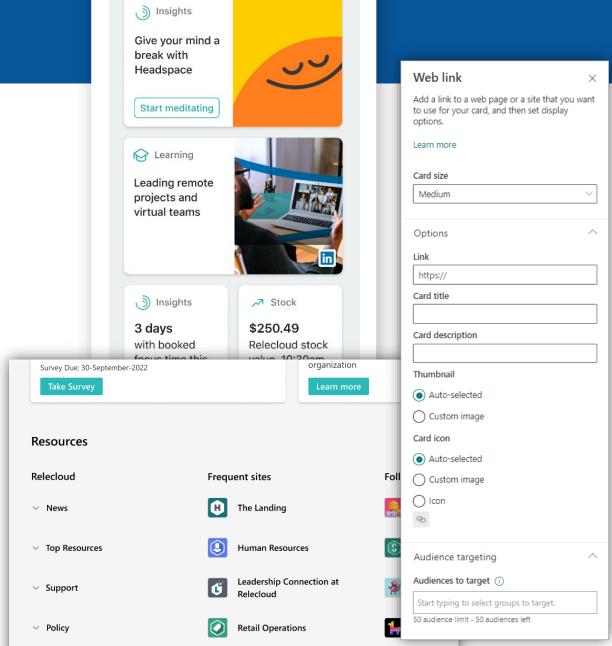
A: While web link cards are the easiest to create, as they just require an URL and an optional image (see pane to the right), data shows usage quickly drops in URL/linkheavy dashboards. There are several reasons why they *are not usually* good vehicles for high engagement.

- Web link cards tend to be static and have zero-to-low refresh. Users expect the Viva connections experience to show customized value even before the card is used (example: number of vacation days available).
- Web link cards take users out of Viva Connections, thus creating a disjointed experience.

There are exceptions:

- Web cards can be temporary placeholders for customers who want to get started quickly and afterwards swap the "sending you to a page" experience with higher value cards with inline actions and task completion.
- Customers with well-designed, high-value, easy to access solutions via a link have used web link cards for high engagement (example: a web link to a day's shifts and payment information, stored on a mobile-friendly intranet page).
 However, even in these scenarios, customers are planning to migrate from web link cards to Connections-native ACE card experiences for paychecks and shifts.

Don't over rely on Web link cards. The Resources tab is the recommended location to place web links.



Viva Connections leverages Adaptive Card Extensions to provide a rich canvas to custom-build satisfying employee experiences for your users.

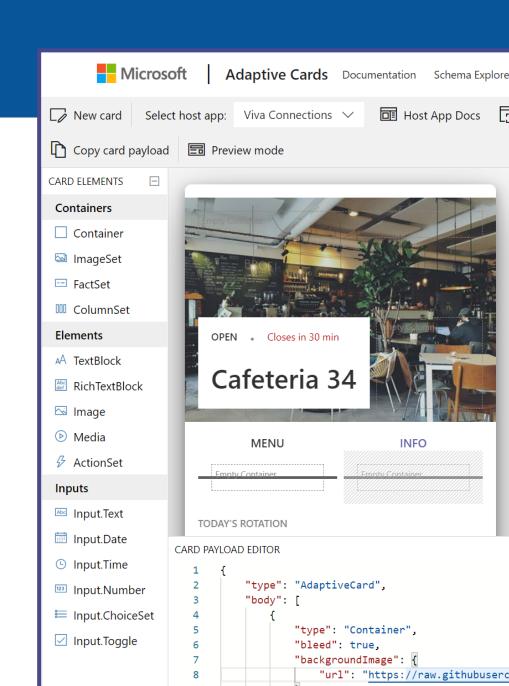
If the high-value scenarios you have identified require you to build cards, you can start your journey by prototyping the experience leveraging the <u>Adaptive Cards</u> <u>Card Designer</u>.



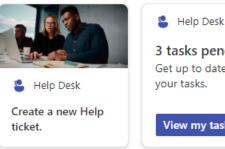
Customers that have built custom Cards have seen that those cards have ~3x the engagement of other cards.

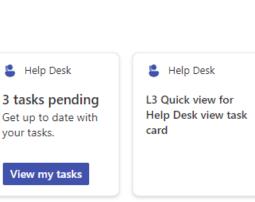
In order to develop more powerful experiences, your developers will leverage the SharePoint Framework (SPFx). This is a robust platform, with significant developer resources available across the Microsoft partner ecosystem, that extends Adaptive Card Extensions to complex scenarios. Review the <u>tutorial for building your first ACE card</u>, leverage the 57+ ready-to-use samples at the <u>Viva Connections sample solution gallery</u>, or take advantage of the <u>Viva Connections sample app</u>, which includes a gallery of 12 cards, 15 quick views, and a Teams Personal App with guidance for an end-to-end experience.

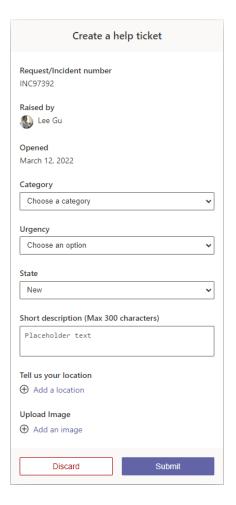
What can be done with custom ACE cards? See some examples from the <u>sample solution gallery</u> in the following pages. As you examine them, consider the differences between the Connections experience and a traditional intranet.

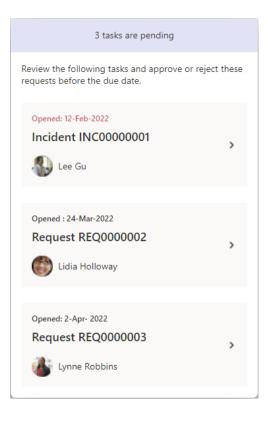


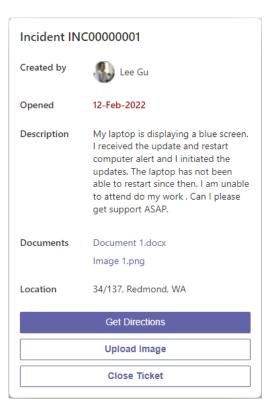
Art of the Possible: Help Desk Tickets.





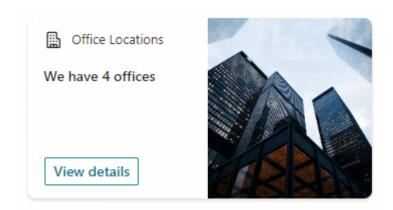








Art of the Possible: Office Locations.

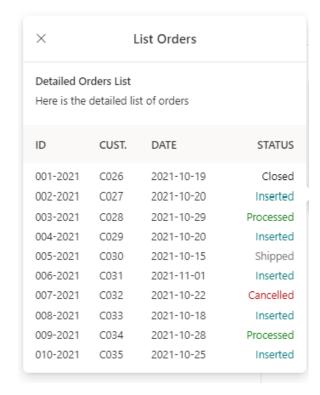


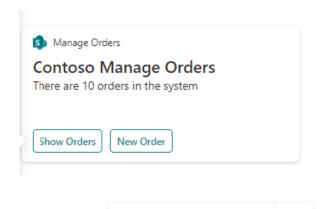


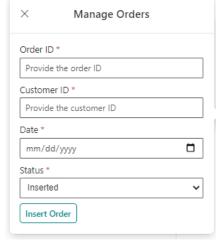


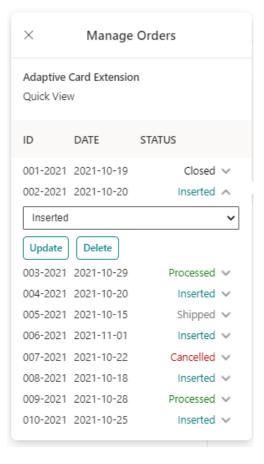
Art of the Possible: List / Manage Orders





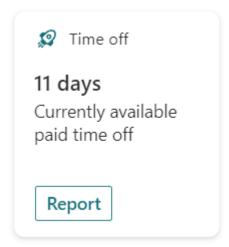


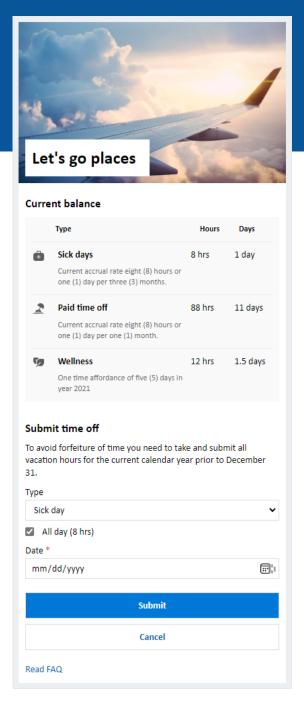






Art of the Possible: Time Off.





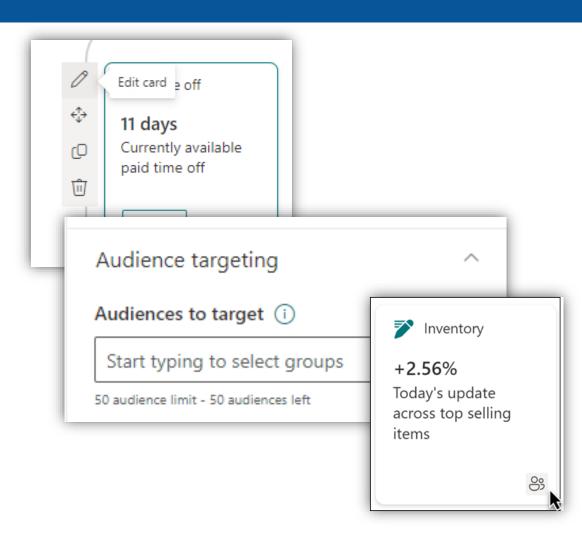


Leverage Connections' <u>Audience Targeting features</u> to make cards more relevant to your employee scenarios.

Audience targeting allows you to define static or dynamic groups of users and make sure some cards are only seen by those groups of users. This will ensure most of the cards your users see are high-value to them, thus increasing their relevance.

Audience targeting doesn't negate the need for quality analysis of 1) the various cohorts your users belong to and 2) your users' expectations of the value provided by ACE cards. In fact, the value of Audience targeting is only apparent once you have made these analyses and created the right cards for their need.

On the other hand, if you have identified the right customer cohorts, and built the right cards for them, Audience Targeting will make those cards more relevant still.







Design a compelling value proposition that takes into account your various users' needs for engagement. Identify or build ACE cards that deliver the value proposition.



Remember to provide scenarios for both your **Information**Workers and your Front Line
Workers.



Consider leveraging **ISV cards** to increase value and reduce time/cost of building.





The key to Feed engagement is to keep your content fresh and compelling.

How fresh is "fresh?" Less than one week old is best. Users don't engage with older news. Also consider that in order to have each user engage with the feed at least once per week, you might need several news per week, as not every user reads every piece of news.

- If you want to know more about how News work, <u>catch</u> up with this introduction.
- Have you set up Organization News sites in your tenant? These are the main source for news in the Viva Connections feed.
- Did you know you can also <u>target news to specific</u> <u>audiences</u>? Leverage this feature to create news that are of interest to particular cohorts of employees.



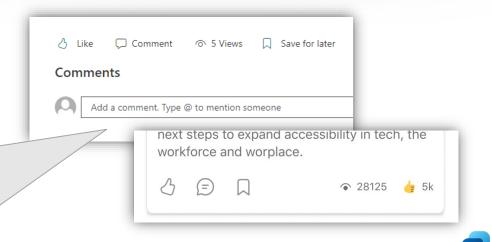
Freshness is not automatic! Your **Employee** Experience lead, or a similar comms role, is needed to make the Feed work.



Images add sizzle! Invest in images for your posts: Relevant Imagery in news and Yammer posts obtain deeper user engagement in Feed.



Teach your users to engage with newsfeed posts to make them more compelling. Likes and Comments are available on desktop and mobile experiences, and @mentions provides a feedback loop and keeps users coming back.



DIVERSITY & INCLUSION

Doubling down on

3

next steps to expand

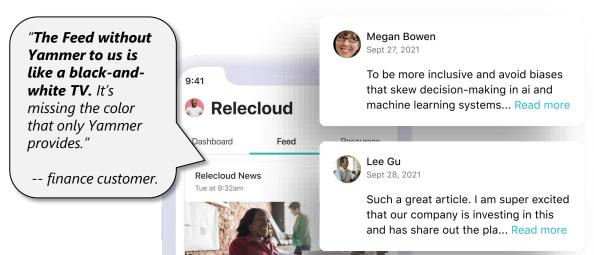
Our new, five-year commitment to help bridge the disability divide

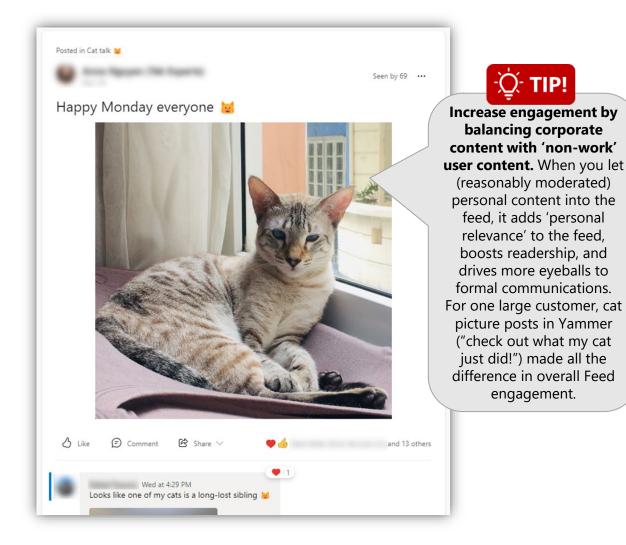
accessibility: Relectoud's

accessibility in tech, the workforce and workplace

Besides News, the Feed takes content from Yammer and Stream. Posts from Yammer communities are great sources of fresh information that helps employees feel more connected with their peers and promotes company culture. The Viva Connections feed leverages Posts to "All Company" as well featured posts and announcements from communities followed by employees. Review more details on how the Feed consumes content from Yammer.

Stream videos shared with the entire organization will also appear in the feed.





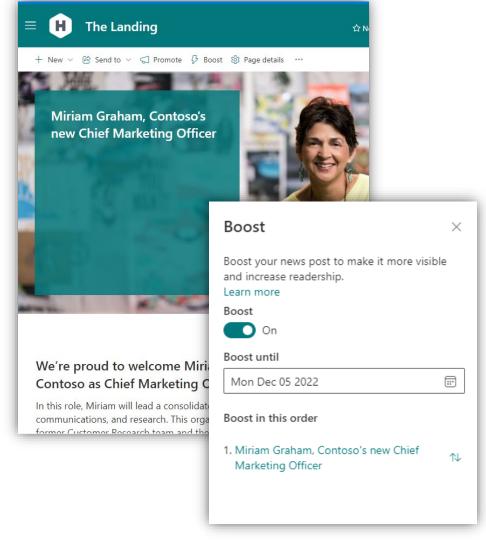
Boosted News increases news visibility and readership in Viva Connections experiences. Read more about how News boosts work.

Can boosting news increase engagement? Telemetry suggests that while News boosts increase visibility of the news post itself, it doesn't increase feed discovery or continued engagement as much as the quality of the news post itself, and the frequency of news posts.

Plan your Boosting strategy carefully. An overuse of boosts defeats the purpose, as you might end up with everything being boosted (the overall limit to boosted news is designed to help you with this). The idea is to boost the posts with the best possibility of engagement *and* relevance to both your users and the company.

Consider that boosting can be done on any Organizational news site, not just on your home portal. This may be good, as it democratizes boosting, but it might also could impact how many boosted articles users see, thus contributing to clutter.









Identify and resource the role in charge of keeping the beat of Feed freshness (Employee Experience lead or similar).

Create quality,
value-infused posts
for the right
audiences,
leveraging images,
targeting, and
boosts when
applicable.

To achieve weekly engagement, **plan multiple posts per week** (as users don't read them all).

Leverage Yammer and Stream as sources for weekly feed activity, and foster reasonably moderated personal content posts from your users.







Providing your users with the Viva **Connections mobile** experience is fundamental to achieving deep, sustained engagement.



Employee Experience Data Point

Viva Connections mobile users' engagement is double that of desktop users.

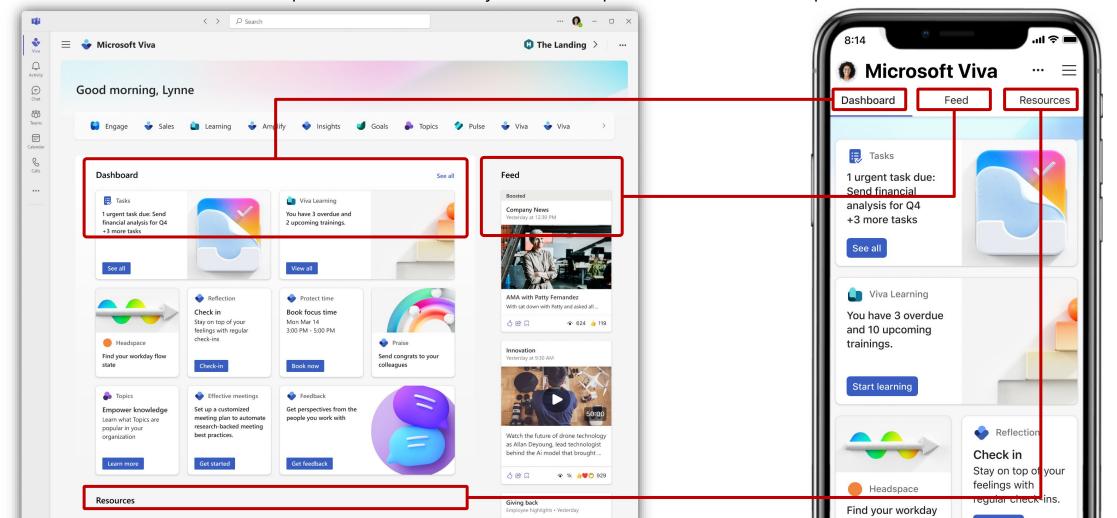


Employee Experience Data Point

Front-line Workers, who tend to be heavy users of mobile devices, have approximately three times the weekly engagement of traditional desk-based Information Workers.



With the release of Viva Home, the User Experience between desktop and mobile (and soon, tablet!) has been unified. This makes it easier than ever to enable a mobile experience that matches your users' expectations on the desktop.

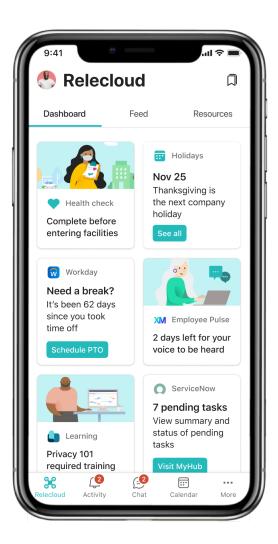




Why is mobile better for engagement? Here is what some of our customers have said...

> "The value prop perception for our users increases when they can activate company processes on the go; for example, when they're at the doctor's office and can access an insurance claim ACE card while waiting. "

> > "The mobile experience around the feed, with the 'swiping' gesture, is more intuitive for our users than mouse scrolling."



"For our Front Line Workers, mobile is the only way to interact with Connections."

"Our Information Workers tell us they can focus in the mobile app. In contrast, they have a lot more distractions when they're on their desktop."





Include mobile deployment as a key part of your **Viva Connections strategy.** Foster mobile with both FLW and IW audiences.



Ensure the dashboard and feed experience are optimized for mobile use.







Pinning brings
Connections to the attention of your users... but doesn't necessarily generate lasting engagement.



Employee Experience Data Point

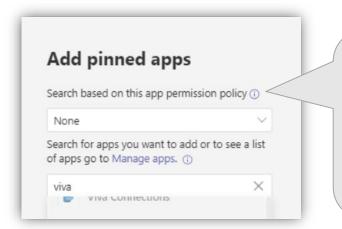
75% of Connections Weekly Active Usage comes from customers who have pinned the Viva Connections app globally.



Pinning works... but only if the value prop already exists.

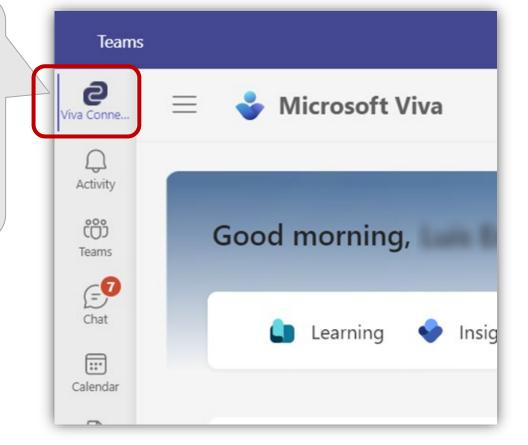
Data also shows customers who have <u>pinned Connections to</u> <u>the Teams bar</u> but have designed low-value ACE cards and Feed refresh rates lose engagement very quickly. Unfortunately, un-pinning and re-pinning the app seldom brings these users back.

Conversely, pinning an app once the value prop for ACE cards and feed has been implemented is very effective in driving traffic, especially mobile traffic!





Top-pinning will increase Viva Connections visibility. It will also reduce overflow of the Connections pin, and allow more people to visit Viva Home. This assumes that you have already created value content for Connections.



Test whether your experience is ready for fullorg pinning by leveraging Teams app policies to pin Connections for a small subset of users first.

Measure feedback and usage and decide whether your Connections experience is ready for full-org pinning.





Don't pin until you have designed and implemented a solid value prop and resourcing.



Sync pinning with mobile deployment and adoption.



Use Teams app policies to test the experience with a small subset of users before pinning to the entire org.



Adoption recommended practices from successful Viva Connections customers



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

- Resource an Employee Experience lead from the planning phase onwards
- Plan and resource with weekly outcomes in mind, multiple activities per week.
- Set and track targets for success with Viva Connections Analytics.

2

Identify and build cards for your employees' high-value scenarios.

- Create a compelling value proposition for your ACE cards, based on your users' needs for engagement.
- Provide scenarios to both your information workers and your first line workers.
- Consider leveraging ISV cards to increase value and reduce cost of building.

3

Keep the Feed *fresh and* compelling.

- Create quality, valueinfused posts, for the right audiences, and with the right cadence (ideally, multiple times per week)
- Identify and resource the role in charge of keeping the beat of Feed freshness
- Leverage Yammer and Stream to foster reasonably moderated personal content posts.

4

Prioritize the *mobile experience*.

- Include mobile deployment as part of your Viva Connections high engagement strategy.
- Ensure the dashboard and feed experience are optimized for mobile use

5

Pin... but only at the *right* time.

- Don't pin until you have designed and implemented a solid value prop and associated resourcing.
- Sync pinning with mobile deployment and adoption.



Helpful Resources

The following resources are referenced and linked throughout this guide

- Microsoft Work Trend Index: 2021 Annual Report
- Guide to setting up Viva Connections.
- Get started with Viva Connections Learning Path
- Employee Experience Advanced Deployment Guide (within tenant)
- Viva Connections Analytics roadmap.
- First-party Adaptive Card Extensions
- Information on Web Link cards
- Third-party partner integrations and ISV cards
- Guidance on building your own cards

Helpful Resources (Continued)

- Adaptive Cards Designer
- Viva Connections sample solution gallery
- Viva Connections Sample App
- Introduction to the M365 News Infrastructure
- How to set up Organization News sites
- News targeting
- Sources for the Viva Connections Feed
- News Boosting
- How to Pin apps for all users in Teams



Thank You

