

# Viva, Teams or SharePoint.

Understanding how they fit together

A report for DWG members only Confidential

Updated January 2023

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## 1

# Introduction.

In this report, we unpack the factors teams need to consider when figuring out the best deployment of Microsoft tools to deliver a fit-for-purpose digital workplace that both meets organizational objectives and supports a strong employee experience.

Microsoft 365 (M365) and related tools like the Viva Suite provide exciting opportunities to deliver comprehensive and integrated digital workplace environments that support a strong employee experience. It's not surprising then that many organizations have chosen the M365 path, with high levels of adoption across Teams and the ability to leverage SharePoint Online for a robust intranet solution, sometimes with no additional licensing costs.

But planning the detail of a M365-powered digital workplace that supports various business and communication goals is not straightforward. Tools across the M365 suite and the Microsoft stack have overlapping capabilities; there is considerable flexibility in how to configure and even customize tools; and different tools can be easily integrated. In particular, the mix of SharePoint, Teams, Yammer and now Microsoft Viva (particularly Connections) requires IT, digital workplace and intranet teams to make specific decisions on which tools to deploy and how to offer them to employees.

The rapid evolution of these tools brings additional dilemmas for digital workplace teams too. Microsoft continues to invest at breakneck speed, particularly in Microsoft Viva, adding new features and opening up capabilities – and it is safe to say that by the time you are reading this report there will have been further developments of the suite.

Digital workplace teams are asking questions such as:

- Which is the best combination of these tools to issue to users?
- How should tools integrate with each other?
- What is the relationship between these different tools?
- When should we introduce a new technology like Microsoft Viva?
- What are the new tools and features available, particularly with Viva?

In this report, we unpack the factors teams need to consider when figuring out the best deployment of Microsoft tools to deliver a fit-for-purpose digital workplace that both meets organizational objectives and supports a strong employee experience.

The report does not attempt to provide a simple answer on how to set up or improve your M365-powered digital workplace, or offer recommended guidance on the best interplay and integration between the different channels. The reason for this is that there are no simple answers. What is a good fit for one organization and its employees may not be so for another. Instead, we try to provide a framework for teams to think about when planning their M365 digital workplace as well as noting the factors that should be considered when making these decisions.

We also focus in detail on the attributes of Microsoft Viva, in particular Viva Connections, which is currently the focus for many digital workplace teams. This new edition of the report (published in January 2023) updates the many new apps and features in Viva that have emerged since the first edition was published in July 2022. Finally, we look at how three organizations – [Avanade](#), [BCD Travel](#) and [Play'n GO](#) – are organizing their M365-powered digital workplaces.



## 2

## Context.

In this section we explore the context behind the Microsoft 365-powered digital workplace and the questions digital workplace teams are asking.

### Channels in scope

In this report, we focus on the three main Microsoft solutions that are delivering employee experience, internal communication and collaboration capabilities, and the interplay between them: SharePoint Online, Microsoft Teams and Microsoft Viva. We also mention Yammer, which can be integrated with all three, and how the Yammer Communities app within Teams has been rebranded as Viva Engage. In particular, we look at the emerging capabilities of Viva, which many digital workplace teams are actively considering and starting to deploy.

Note that the levels of access organizations have to these tools will depend on their licensing agreement with Microsoft. For example, some apps within the Viva suite come at an additional price. For convenience, we tend to use Microsoft 365 or M365 to collectively describe this set of tools, although Office 365 and Microsoft 365 are distinct, albeit related, offerings.

Below, we consider the context of the main solutions covered in the report.

### About SharePoint and SharePoint Online

SharePoint is an extremely mature content, collaboration and document management platform provided by Microsoft, which has been around in one form or another since 2003. It has been the dominant base technology for intranet and employee portals for nearly two decades and has gone through various releases and evolutions.

The most significant developments in recent years have been the release of SharePoint Online and the modern framework, which has a more contemporary and user-friendly user interface (UI) than classic SharePoint. SharePoint is heavily integrated with Teams, providing the document library capability within Teams. Microsoft SharePoint is bundled with most M365 licences.

Modern SharePoint Online offers opportunities to deploy an enterprise-level intranet out of the box with minimal customization and without having to invest in additional intranet-specific software; this provides an attractive option for enterprises who can fully leverage the value of their Microsoft 365 investment. Although there is less flexibility around design, and some capabilities are limited, major companies such as [Southwest Airlines](#), [BCD Travel](#), [VELUX Group](#) and [LEGO Group](#) have chosen this path.<sup>1</sup> This has been achieved because Microsoft has invested in features that deliver enterprise intranet qualities such as a global navigation, personalization and the roll-up of news.

In addition, modern SharePoint communication sites also offer a convenient way to provide sites that can act as local communication hubs to distribute news, documents, events, links, and more. Typically, an organization may have a SharePoint intranet but also many additional communication sites that sit outside the intranet estate.

Modern SharePoint Online offers opportunities to deploy an enterprise-level intranet out of the box with minimal customization and without having to invest in additional intranet-specific software; this provides an attractive option for enterprises who can fully leverage the value of their Microsoft 365 investment.

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### About Microsoft Teams

Microsoft Teams is a collaboration and communication platform that was launched in 2017. While initially Teams seemed to be a rival to collaboration platform Slack, since then Microsoft has invested heavily in the product, evolving it as a unified communication platform, facilitating calls, online meetings, chat and messaging, document collaboration and even live online events.

Teams has also emerged as a place to access different aspects of the digital workplace, including the ability to view content, share documents, complete transactions and search for items. This has been partly enabled through a growing library of apps and integrations both from across the Microsoft 365 suite and increasingly from other popular enterprise digital workplace platforms such as ServiceNow, with an expanding set of connectors out of the box.

Microsoft Teams has been a remarkable success, with huge levels of adoption which increased significantly during the pandemic; in July 2021, there were approximately 250 million monthly active users.<sup>2</sup> Anecdotally, Teams adoption within some companies is very high, with users spending most of their working day in Teams. The twin factors of high adoption and easy integrations mean that organizations are increasingly choosing to push content and services through Teams, including access to a SharePoint intranet. Some organizations, such as [Avanade](#), are also making it the centre of their digital workplace.

### About Microsoft Viva

Microsoft Viva is a suite of apps viewed through Microsoft Teams, which launched in early 2021. Microsoft has positioned it as an employee experience platform (EXP) that helps *“people and teams reach their potential with communications, knowledge, learning, resources and insights”*.

Initially, it focused on four different apps, with a further app (Viva Goals) announced in 2022:

- **Viva Topics:** automatically organizing content and knowledge into different topics.
- **Viva Connections:** a personalized overview of news, conversations and tools.
- **Viva Learning:** access to relevant learning resources directly in the flow of work.
- **Viva Insights:** wellbeing and productivity analytics, and related insights for individuals, managers and organizations.
- **Viva Goals:** objectives and key results (OKR) software resulting from Microsoft's acquisition of Ally.io.

However, Viva has now expanded significantly with the following apps and capabilities either live already or due for release in 2023:

- **Viva Engage:** social collaboration and communities through a rebrand of the Yammer Communities teams app.
- **Viva Amplify:** a hub for internal communicators to plan, create and analyse their communications and campaigns.
- **Glint:** an integration of an enterprise-wide employee survey and feedback tool offered through Viva, which may be rebranded once integrated.
- **Viva Pulse:** a survey and feedback tool for managers and their teams.
- **Viva Sales:** a role-based app aimed at those involved in sales, delivering sales and customer data into Teams and Outlook, and automating data capture into a CRM system.
- **Answers in Viva:** social Q&A capability backed up by AI.
- **People in Viva:** ability to view an interactive organizational chart.

To a certain extent, Microsoft Viva is a rebranding of different Teams and Microsoft 365 roadmap features and initiatives that were already in flight prior to the 2021 launch. It is in a state of constant evolution and a heavy focus for investment, which is resulting in more features, integrations between the constituent apps and new licensing arrangements. The 'Viva' brand is also being applied to services outside the suite of Teams apps, such as personalized briefing emails received by individuals.

Of the different Viva apps, Connections and Engage are provoking the most interest amongst intranet and internal comms teams. This is partly because these are bundled free with most M365 licences, but also because they help to deliver communications and engagement-led content, as well as to enable connection across different channels. In this report, we focus more on Viva Connections than the other apps in the suite. Once released in 2023, we expect Viva Amplify to be on the radar of internal communicators too.

### About Yammer

Yammer is a mature social collaboration platform or enterprise social network (ESN), which was created in 2008 and acquired by Microsoft in 2012. Many organizations use Yammer for community, discussion and social networking capabilities, with varying success. Some organizations report high adoption, while others have more modest use. Increasingly, it has been used by internal communicators for engagement purposes, and even to distribute news. It can be integrated into SharePoint and Teams using web parts, while Viva Connections can surface Yammer conversations.

In the summer of 2022, the previous Yammer Communities app for Teams was rebranded and revamped as Microsoft Engage, bringing new features such as Stories and Storylines, which have also been introduced in Yammer. Some have speculated that the whole of Yammer may be rebranded as Viva Engage at some time in the future.

The high use of Microsoft Teams has highlighted an overlap in some capabilities with Yammer, causing some to question which should be used for engagement-led discussions. We don't explore this topic in detail in the report. However, the general consensus is that Teams is designed for more closed, smaller-scale discussions across teams, groups or projects, while Yammer is better suited for wider, more community-focused and even enterprise-wide communications and conversations.

### Key questions for digital workplace teams

Microsoft 365 is a versatile, powerful and flexible suite of tools with a number of interlocking and overlapping features and capabilities that enable collaboration, communication and content publishing, plus simple transactions and workflow. This means there are multiple options for digital workplace, intranet and Microsoft 365 teams in achieving their objectives, often presenting them with a conundrum on how to plan or best improve a specific deployment. An added complication is that the tools keep on evolving – and rapidly – for example, with Microsoft Viva now opening up new opportunities to deliver content and services to employees.

Key questions that intranet, digital workplace and digital communications teams are asking include:

#### Which tool and channel should be used for what purpose?

'Which tool to use when' is at the heart of many digital workplace- and employee experience-related decisions, and is commonly pondered in relation to the M365 platform. Which is the best of the Microsoft suite tools and channels to use for a range of different scenarios and use cases, including internal communications, frontline communications, social collaboration, knowledge management, employee self-service, and more?

#### What are the relative strengths of SharePoint, Teams, Yammer and Viva?

For digital workplace and intranet professionals, much of the 'overlap' between communication and collaboration features occurs between SharePoint, Teams and Yammer. Microsoft Viva (especially Viva Connections) then adds even more options on how to provide access to this content.

The ability to integrate these tools further complicates the issue. You can access SharePoint documents through Teams, and Yammer conversations through a SharePoint intranet or Teams, but Viva Connections alters the way you access Yammer and SharePoint content through Teams – and you can access a Viva Connections dashboard through SharePoint! However, there are differences between all these experiences in terms of the user experience, findability, personalization and targeting, and more.

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### Should I provide multiple routes to the same content and services?

Microsoft 365 presents opportunities to build a multichannel environment that provides different routes to the same content and services; for example, a user may be able to access the same news item through a SharePoint intranet, via Yammer or through Microsoft Teams/Viva Connections. Are there any downsides to working like this – for example, overloading employees with the same content, generating confusion over the use of different channels, or reducing the impact, findability or adoption of content by changing how it is accessed?

### As an internal communicator, how can I use Microsoft Teams and Viva to deliver communications?

When Microsoft Teams has good levels of adoption and is where much of the daily flow of work is happening, internal communicators are often keen to try and take advantage and deliver internal communications that have the potential to increase the reach and views of news stories.

### Should I make my SharePoint intranet available via Teams – and, if so, should I use Viva Connections?

Similarly, intranet teams may be keen to take advantage of the high usage of Teams and provide access to the intranet through it, again to drive good intranet adoption. Here, there are questions on how to do this – for example, whether to use Viva Connections, or potentially just pin a link to the intranet through the global Teams navigation. There may also be an impact on how content is consumed and even how your intranet is managed; for example, are you designing an intranet to be primarily experienced through Teams or the browser?

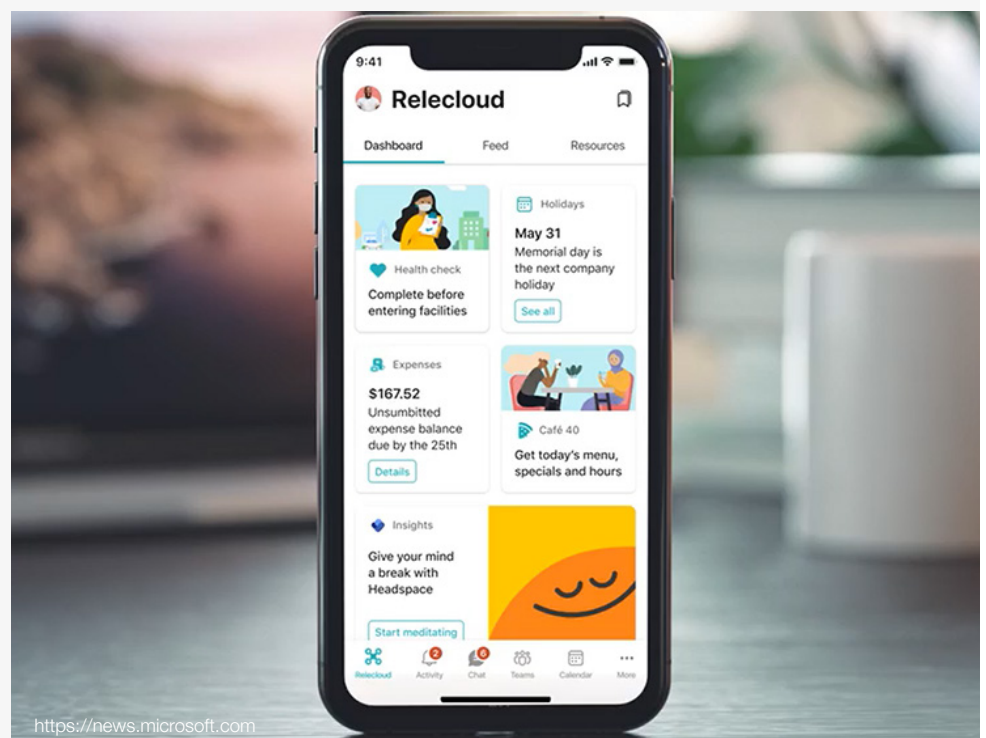
### How do I set up SharePoint to deliver Viva Connections?

Setting up Viva Connections has a dependency on how you set up SharePoint. You need to establish a home site (a communication or hub site that acts as a main landing site), consider the global navigation, focus on how news rolls up across different sites, and more; this has the potential to impact how your users experience their SharePoint intranet through the browser.

### Other questions

Of course, the above are just some of the specific questions that arise; there are also many others relating to the impact on different aspects of managing a M365-powered digital workplace, including:

- How can we make content findable across multiple channels?
- How do users navigate between different channels and tools?
- What is the impact on analytics when content is accessed via multiple places?



## 3

# Factors influencing set-up and delivery.

In this section, we introduce a framework to help digital workplace teams consider some of the key factors that will influence how to deploy the different Microsoft 365 channels; their specific integrations with each other; details of how they are set up; and what they offer.

These different influences are quite granular and operational and are not clear-cut, with no single optimal set-up across all organizations or one-size-fits-all approach. Bearing that in mind, we attempt to unpack the different factors influencing set-up and delivery across seven key areas:

1. Employee experience.
2. Communication and adoption.
3. User experience and findability.
4. Risk and compliance.
5. Support and governance.
6. Costs and licensing.
7. Other Microsoft 365 characteristics.

In doing this, we are assuming that the strategic goals of your digital workplace or intranet have been clarified and agreed upon; these will undoubtedly influence the prioritization that guides any decision-making relating to specific areas.

## 1. Employee experience

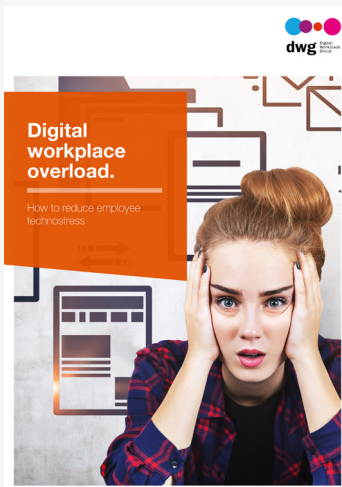
At a high level, employee experience is regarded as important by HR functions and leadership, having an impact on employee retention and attraction, customer service and even profitability. Supporting strong employee experience is a common goal for digital workplace teams, with the aims of driving productivity, raising efficiency, supporting wellbeing, and more. In turn, this has an influence on the set-up of Microsoft 365 and the relative tool/channel mix.

### The desire for a single pane of glass

A common aim for digital workplace professionals – but also often requested by users – is the idea of an integrated digital workplace ecosystem, a ‘single pane of glass’ that provides an effective and convenient entry point and ‘front door’ to the wider portfolio of digital workplace applications, all underpinned by single sign-on (SSO).

Some digital workplace teams want to go further still and integrate services so that employees can also complete simple transactions and find personalized information from one place, without the need to visit separate applications or face inconsistent experiences. Some vendors, such as Workgrid, strongly associate the idea of the ‘single pane of glass’ with improved employee experience and providing an ‘experience layer’ to ensure a consistent interface.<sup>3</sup>

The Microsoft 365 universe can be confusing and bewildering, with multiple branded apps and channels, plus a pace of change and evolution that is very hard for users to keep up with. It may be that, technically, the digital workplace team have delivered a shiny, integrated digital ecosystem – but this might not be how users actually experience and perceive it.



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It is argued that if a person can stay within Teams and access all they need, they will have a more frictionless and unfragmented experience.

An integrated digital workplace or front door helps reduce the need to enter different applications, which can be time-consuming, frustrating and overwhelming for users. It also gives users the confidence that they can find what they need for the working day and keep on top of different tasks and notifications. The M365 digital workplace provides opportunities to create a more integrated digital workplace experience, not just with Microsoft tools but adding in non-Microsoft systems and applications as well.

At the same time, there is also the potential for the opposite to happen, with the introduction of additional M365 tools creating more channels and tools, and therefore some confusion (or at least that perception among employees) – for example, introducing Yammer on top of Teams where there is some overlap of capability.

The Microsoft 365 universe can be confusing and bewildering, with multiple branded apps and channels, plus a pace of change and evolution that is very hard for users to keep up with. It may be that, technically, the digital workplace team have delivered a shiny, integrated digital ecosystem – but this might not be how users actually experience and perceive it.

#### Delivering content and services in the flow of work

Another disadvantage of a digital workplace with multiple apps, where employees need to keep visiting different systems to get things done, is the impact this can have on both productivity and wellbeing. 'Context switching' is inefficient and interrupts the flow of work; 43% of employees believe that switching tasks causes them fatigue.<sup>4</sup> Delivering content and services in the systems that employees are using so that they don't have to break their concentration is increasingly becoming a dynamic in designing digital workplaces; teams are therefore thinking of how they can provide access to communications and transactional capabilities *in the flow of work or where work happens*, such as Microsoft 365 or Salesforce.

In terms of M365 digital workplaces with high Microsoft Teams adoption, this thinking provides a rationale for delivering content through Teams. For example, learning content and course details, which are not usually integrated into a SharePoint intranet but instead reside in a learning management system (LMS) or third-party site, can now be surfaced in Teams through Microsoft Viva Learning, providing greater visibility, proximity and findability, with opportunities to discuss and share.

Anecdotal, providing content in the flow of work is also being suggested as an antidote to the sometimes poor adoption of intranets where the time and effort of having to boot up a browser and access a separate channel out of the flow of work is positioned as a barrier to intranet use. Instead, it is argued that if a person can stay within Teams and access all they need, they will have a more frictionless and unfragmented experience, although it is worth remembering that a person using Teams will likely have to switch Teams space or channel, or open up a new Teams window, multiple times per day.

#### Multiple entry points into the digital workplace to meet diverse needs

Workforces in large, global organizations are complex and diverse, with different needs, preferences and modes of access to digital tools. Digital employee experience, by definition, places users at the centre of the digital workplace and therefore must meet a range of needs, by providing different entry points into the digital workplace and corresponding relevant experiences. For example, this might mean providing:

- choice on how users access the digital workplace
- different front doors and entry points into content and services
- access from multiple devices, including mobile.

The Microsoft 365 suite provides an opportunity to offer an integrated and consistent ecosystem with multiple entry points into the same content, features and apps, which can be accessed across different devices and working from anywhere. This rationale is particularly important in supporting hybrid and remote working.



### Example: Entain Group

**Entain Group**, a global online betting and gaming company, headquartered in the UK, created a new single digital workplace ecosystem that incorporates SharePoint, Teams and Yammer as well as non-Microsoft tools, offering different entry points to content, including:

- a SharePoint intranet with Yammer feeds integrated
- the ability to view the intranet through Teams
- mobile access to the intranet via the mobile Teams app
- a consistent dashboard through to a range of digital services including non-Microsoft tools such as ServiceNow, available both through the SharePoint intranet and within Teams.<sup>5</sup>

### Adding specific integrations

One way in which digital workplace teams are creating the 'single pane of glass' is by adding specific integrations into the environment. Microsoft 365 enables this for tools across the suite and it has generally become easier to do, with the ability now to add M365-related web parts into SharePoint or drop M365 apps into Teams.

However, providing this consistent experience across all the different strands of M365 remains some way off, with anomalies in what you can and can't do dependent on how you are accessing content and features. For example, what you can view and the level of interaction you have with Yammer is different across feeds integrated into SharePoint and Teams, as well as in Yammer itself.

Another challenge is that adding integrations for non-Microsoft tools is less straightforward. Currently, many teams are using the intranet to create that 'digital workplace front door' to non-Microsoft tools principally through:

1. Creating central directories of apps, tools and sites.
2. Allowing users to personalize a list of links to favourite tools and apps.
3. Aggregating 'to-do' notifications and reminders for the individual user.
4. Adding custom 'micro-apps', where users can perform transactions and see data without entering an app, e.g. to view and book annual leave.

However, the opportunities to use SharePoint Online straight out of the box to deliver capabilities relating to points 2 and 3 are limited without using an intranet in-a-box product, some level of customization or acquiring a commercially available web part. These are currently key missing features in SharePoint Online and it may be that Microsoft chooses to rectify this in the future.

The ability to add 'micro-apps' for non-Microsoft 365 tools in SharePoint Online is also difficult without customization. Here, Microsoft Teams and Microsoft Viva provide some alternative options – for example, in Teams, it is possible to add apps from the Teams store:

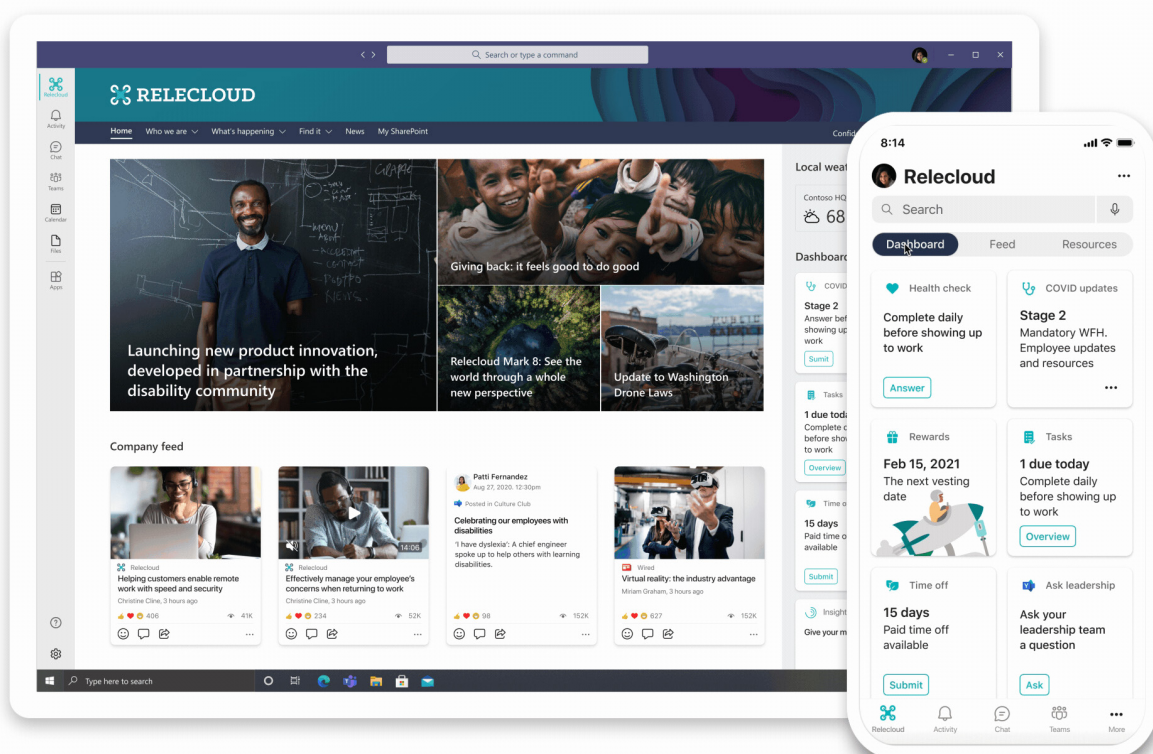
- from across Microsoft 365
- from a library of external apps and connectors from popular systems<sup>6</sup>
- using Teams' in-built apps and workflows that can be configured and cover several types including bookings, lists, tasks, praise and approvals (note that the latter requires a Power Automate licence).<sup>7</sup>

You can also integrate into Teams bots that can perform simple transactions through a conversational interface, potentially using Power Virtual Agents within the Microsoft Power Platform.

The Microsoft Viva Connections dashboard is evolving as an option to embed cards that can deliver some integrations with non-M365 tools and then be added as a web part into your intranet.

## Summary

Element	Benefits	Opportunities	Challenges
<b>Single pane of glass</b>	<ul style="list-style-type: none"> <li>Drives efficiency and productivity.</li> </ul>	<ul style="list-style-type: none"> <li>M365 supports an integrated experience.</li> <li>Single sign-on supported.</li> <li>Reduces proliferation of apps in use.</li> <li>Creates a starting point into the digital workplace.</li> <li>Provides a more consistent experience for employees.</li> </ul>	<ul style="list-style-type: none"> <li>Adding tools within an integrated ecosystem may actually increase apps in use.</li> <li>M365 tools are numerous and can be overwhelming.</li> <li>Pace of change can be confusing.</li> </ul>
<b>Content and services in the flow of work</b>	<ul style="list-style-type: none"> <li>Supports good adoption.</li> <li>Drives efficiency and productivity.</li> </ul>	<ul style="list-style-type: none"> <li>Many people are working in Teams.</li> <li>Reduces context switching.</li> <li>Greater visibility of and proximity to content and services.</li> </ul>	<ul style="list-style-type: none"> <li>Not everyone is working in Teams, e.g. Salesforce, Slack.</li> <li>Experiences within Teams are still sometimes fragmented.</li> </ul>
<b>Multiple entry points</b>	<ul style="list-style-type: none"> <li>Supports diverse needs, preferences and scenarios.</li> <li>Supports hybrid and flexible working.</li> </ul>	<ul style="list-style-type: none"> <li>Easy integrations between M365 apps provide easier multiple entry points.</li> </ul>	<ul style="list-style-type: none"> <li>Hard to provide 'entry points' via non-M365 tools where employees may be working.</li> <li>Creating a 'single' entry point via mobile might not be possible.</li> </ul>
<b>Add specific integrations</b>	<ul style="list-style-type: none"> <li>Helps task completion.</li> <li>More consistent user experience.</li> </ul>	<ul style="list-style-type: none"> <li>Easy integrations between M365 apps.</li> <li>More out-of-the-box connectors from Microsoft.</li> <li>Growing options to add apps in Teams.</li> <li>Using the Viva Connections dashboard for integrations.</li> </ul>	<ul style="list-style-type: none"> <li>Integrating non-M365 tools is not always easy.</li> <li>SharePoint Online out of the box may require an in-a-box product or customization to integrate apps.</li> <li>Experiences between M365 applications can be inconsistent.</li> </ul>



<https://news.microsoft.com>

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The ability to deliver successful notifications can also influence the channel tactics used by internal communicators. One of the problems across different channels is making employees aware that new stories have arrived, and Teams and Yammer don't have a purpose-built way to do this.

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## 2. Communication and adoption

A key consideration for the deployment and interplay of different M365 tools is ensuring that communication and adoption goals are met. In particular, the high usage of one system – likely to be Microsoft Teams – may present itself as an opportunity for internal communicators and intranet teams to piggyback off that success to achieve better adoption as well as greater reach with internal communications and related content.

### Better adoption across different channels

Every intranet team wants better intranet adoption. When Teams usage is high, invariably employees are spending more time in that platform than in a SharePoint intranet. Delivering intranet access through Teams is therefore regarded as helpful in supporting adoption by removing the need to enter the intranet as a separate platform, where even the modest additional time and effort involved can be a barrier to higher usage of the intranet.

Digital workplace professionals may also want to encourage better adoption of Teams, Yammer or Viva through integrations or references to these tools within SharePoint, such as providing a list of relevant Teams spaces inside a SharePoint intranet, enabling Viva Connections web parts within a SharePoint intranet, or offering a directory of Yammer spaces that people can browse and then join.

### Greater reach and engagement around internal communications

Internal communicators are also keen to maximize the reach and impact of their messages, increasing the number of reads of stories and levels of engagement with content. Using both Teams and Yammer to deliver internal communications has the potential to increase the number of readers, especially if adoption of these tools is high or if particular groups of employees are using these channels rather than a SharePoint intranet.

The use of discussion threads within Yammer and Teams has the potential to increase engagement. For example, [Play'n GO](#) reports better reach and more engagement with intranet stories that have been cross-posted onto Microsoft Teams. However, there is less control over users receiving the same message across multiple channels – but this can be a price that internal communicators are prepared to pay in order to get the message out to the maximum number of people.

Note that the ability to deliver successful notifications can also influence the channel tactics used by internal communicators. One of the problems across different channels is making employees aware that new stories have arrived, and Teams and Yammer don't have a purpose-built way to do this. To get round this, the Play'n GO team @mention the whole organization when a new story is posted onto Teams, activating the red dot to show that there are items for attention. This might help to drive reach but it's a less than ideal situation and, when used too often, employees may end up just ignoring these notifications or even mute an internal communications channel in Teams.

### Easier to reach frontline staff via a mobile experience

Communicating digitally with frontline staff has traditionally been harder than with deskbound staff; historically, there have been various reasons for this, including limitations around access to different channels and a lack of Microsoft 365 licences and related digital identities. However, in recent years, things have tended to get easier, mainly by delivering content and services through mobile apps, which can be accessed via employee-owned devices.

The ability to deliver an effective mobile experience to frontline staff can influence the choice of channels and tools used; for example, Microsoft F3 licences designed for frontline staff focus on using Microsoft Teams for a number of specific use cases, while the Viva Connections dashboard is currently oriented around a mobile experience, again specifically with frontline employees in mind.

### Audience targeting

Personalization and the ability to target content are core tenets of any digital workplace and usually a must-have element for complex and diverse organizations to ensure that internal communications are relevant. Audience targeting is normally done through using Active Directory (AD) profile data, which ideally should synchronize with an organization's HR system of record. Having complete and reliable AD profile data is therefore often a dependency for delivering successful personalization and content targeting.



There are some operational constraints around delivering more complex audience targeting using only SharePoint Online out of the box – and this is often one of the many reasons organizations choose to buy ‘in-a-box’ intranet software that can deliver this more easily. For example, there is a limit to the number of personalized navigations that can be delivered (at the time of writing, a maximum of 10 different versions of the navigation) and some variation across web parts in the ability to target to different audiences.

Viva Connections allows audience targeting, for example with the ability to target the various cards in the dashboard to different audiences. Although the Viva Connections feed has audience targeting as a factor and SharePoint home site news can be ‘boosted’ for prominence, it is driven by an algorithm. The sense of a loss of full control over what goes in the feed is a concept that might not sit fully comfortably with all communicators.

### Content strategy and governance

Successful intranets tend to have a content strategy behind them that spells out where content should reside or which channel should be used based on its audience and purpose. A commonly seen delineation for content that is either restricted because it is sensitive or has related privacy issues, or of limited interest to an enterprise audience because it is only used by a specific group, team, function or location, is for this to go into Teams, while other more universal and public content will go into a SharePoint intranet. This helps to support content quality, relevance and findability on your intranet and, arguably, leads to better usage of Microsoft Teams.

### Summary

Element	Benefits	Opportunities	Challenges
<b>Better adoption of digital workplace channels</b>	<ul style="list-style-type: none"> <li>Stronger adoption and usage.</li> <li>ROI on channels.</li> <li>Helps introduce new tools.</li> </ul>	<ul style="list-style-type: none"> <li>Leverage high adoption of Teams or other channels.</li> <li>Easy integration between different M365 tools.</li> </ul>	<ul style="list-style-type: none"> <li>Good adoption might not be there in the first place.</li> <li>Good adoption doesn't always equate to business value.</li> </ul>
<b>Better reach of internal communications (e.g. news)</b>	<ul style="list-style-type: none"> <li>Better and wider impact of internal communications.</li> </ul>	<ul style="list-style-type: none"> <li>Use Teams and Yammer to post stories to increase reach.</li> <li>Discussions can increase engagement.</li> </ul>	<ul style="list-style-type: none"> <li>Notifications are not straightforward.</li> <li>There is no control over repetition of messages across different channels.</li> </ul>
<b>Easier to reach frontline staff through out-of-the-box mobile capabilities</b>	<ul style="list-style-type: none"> <li>Supports digital communications and services to a harder-to-reach audience.</li> </ul>	<ul style="list-style-type: none"> <li>Viva Connections dashboard is optimized for mobile.</li> <li>Frontline use cases have more impact.</li> </ul>	<ul style="list-style-type: none"> <li>Lack of M365 licences.</li> <li>Mobile enablement can have operational hurdles.</li> </ul>
<b>Audience targeting</b>	<ul style="list-style-type: none"> <li>Helps drive relevance of messaging and experiences.</li> <li>Supports better adoption.</li> </ul>	<ul style="list-style-type: none"> <li>Audience targeting built into SharePoint, Viva, etc.</li> <li>Viva Connections feed provides additional criteria.</li> </ul>	<ul style="list-style-type: none"> <li>Some variations and constraints in targeting in SharePoint Online.</li> <li>Dependency on good AD data.</li> <li>The practice is sometimes harder than the theory.</li> <li>Some internal communicators may not like loss of control in the Viva Connections feed.</li> </ul>
<b>Content strategy and governance</b>	<ul style="list-style-type: none"> <li>Supports content and communication goals.</li> </ul>	<ul style="list-style-type: none"> <li>Defines the right channel for localized or sensitive content.</li> </ul>	<ul style="list-style-type: none"> <li>Ensuring the content strategy is adhered to.</li> </ul>

### 3. User experience and findability

There will always be differences of opinion but, generally, the design of Microsoft 365 products, including modern SharePoint, Teams, Viva Connections and Yammer, offers levels of usability and accessibility that are perfectly acceptable to the vast majority of organizations – and are often appreciated, although not always loved.

#### Branding

Microsoft 365 tools come with limited opportunities for custom branding. In practice, this is usually far more of a problem for internal communicators than it is for end users. The environment that offers most flexibility is SharePoint, with some options around colours, fonts and logos, but ultimately it requires customization to get a look and feel that fully aligns with corporate branding. Microsoft Teams simply looks like Microsoft Teams. Viva Connections now has some options to put a custom logo and name on the global Teams navigation, allowing Connections to align with your intranet name and logo, for example.

#### Consistency

There are opportunities to provide a consistent view via the browser using SharePoint and through the Teams environment. The global navigation enhances consistency across different apps, but there are other challenges relating to navigation, which are outlined below.

As already noted, there are also some anomalies, for example around the level of interaction with Yammer, which can be integrated into SharePoint and Teams in different ways and further experienced through Connections, which means viewing the Yammer integration in SharePoint within the Teams environment.

#### General search experience

Good findability is critical for a successful Microsoft 365 implementation and can be an influencing factor in where to deploy content. Inconsistent search experiences across different apps further complicate matters. For example, channel proliferation in Microsoft Teams is a real problem, meaning it can be hard to find what people want if there are too many Teams spaces and channels. A Teams search looks through your Team channels; it's not the same as a full Microsoft search experience, which is more likely to be delivered through your SharePoint or SharePoint intranet search. The proliferation of Microsoft communication sites can make pinpointing what you need very hard.

Search and Microsoft search are huge topics in themselves and there isn't space to explore all the issues here, but the search experience always needs to be considered when deciding which channel to deploy and where your content will sit.

#### Navigation

Establishing navigation across the digital workplace with Microsoft 365 remains a challenge. Although there is more consistency with the establishment of the global navigation feature, the overall relationship between the enterprise-wide navigation of your intranet, your Teams environment and overall M365 global navigation remains unclear.

Most digital workplace teams want to provide an intuitive and consistent navigation in order to support findability, but that's not necessarily how navigation tools have been built by Microsoft. You can set a global navigation that helps employees navigate across different applications, but it might not be consistent with the core navigation of your SharePoint intranet or Teams environment; you can also effectively end up with both navigations being exposed at once in the same view, which causes confusion.

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Good findability is critical for a successful Microsoft 365 implementation and can be an influencing factor in where to deploy content. Inconsistent search experiences across different apps further complicate matters.

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## Summary

Element	Benefits	Opportunities	Challenges
<b>Usability and accessibility</b>	<ul style="list-style-type: none"> <li>A good user experience.</li> </ul>	<ul style="list-style-type: none"> <li>M365 tools have an experience that most organizations are happy with.</li> </ul>	<ul style="list-style-type: none"> <li>Specific content may not meet standards.</li> </ul>
<b>Branding</b>	<ul style="list-style-type: none"> <li>Corporate branding helps to drive engagement and validate official channels.</li> </ul>	<ul style="list-style-type: none"> <li>Some branding options, mainly in SharePoint.</li> </ul>	<ul style="list-style-type: none"> <li>Branding is generally limited without customization or using a third-party product.</li> </ul>
<b>Consistency</b>	<ul style="list-style-type: none"> <li>A good user experience.</li> </ul>	<ul style="list-style-type: none"> <li>Generally consistent experience of content through Teams and SharePoint.</li> </ul>	<ul style="list-style-type: none"> <li>Some inconsistencies, e.g. access to Yammer.</li> </ul>
<b>General search experience</b>	<ul style="list-style-type: none"> <li>Supports good findability.</li> </ul>	<ul style="list-style-type: none"> <li>Leverage Microsoft search.</li> </ul>	<ul style="list-style-type: none"> <li>Channel and site proliferation.</li> <li>Inconsistent search experiences across channels.</li> </ul>
<b>Navigation</b>	<ul style="list-style-type: none"> <li>Supports good findability.</li> </ul>	<ul style="list-style-type: none"> <li>Some consistency in the global navigation.</li> </ul>	<ul style="list-style-type: none"> <li>Inconsistencies in the navigation across different channels.</li> <li>More than one navigation exposed in the same view.</li> </ul>

## 4. Risk and compliance

There is a range of risk and compliance factors that can impact decision-making on which tools to deploy.

### Limiting factors

Most risk and compliance considerations are very important but limiting, and could result in:

- stopping the deployment of cloud solutions for particular uses and, for example, forcing an organization to use SharePoint on-premises, which might, in turn, influence the ability to successfully launch a solution such as Viva Connections
- blocking access to use of a mobile app that might be available on employee-owned devices
- preventing the roll-out of a particular Microsoft 365 app or capability that is deemed to be risky.

Specific risk and compliance factors that can impact decisions limiting the use of tools include:

- regulatory compliance across various sectors – for example, in financial services, forcing the use of on-premises solutions
- discoverability and auditing: the need to ensure audit trails etc. for compliance purposes
- legal or security considerations relating to the employment status of the workforce, for example on-the-clock workers in the US, furloughed employees during COVID, or employees who are outsourced
- the legal jurisdiction where servers hold information and data, although this is generally less of an issue as Microsoft now provides more options
- the influence of employee bodies like workers' councils and trade unions which might need to be consulted and agree on the use of tools
- data privacy and GDPR issues, for example preventing access to sensitive customer data
- policies of national governments which might prevent or restrict access to Microsoft or other digital workplace tools
- the trust placed in employees by senior management, which has in the past restricted access to social platforms for frontline employees
- the level of support within individual tools to ensure organizational IT security policies and standards, such as delivering multifactor authentication
- restrictions to mobile apps available on employee-owned devices
- data and information management dependencies in order to deliver channel objectives, for example having robust and complete AD data to support effective personalization and audience targeting.



Risk and compliance factors tend to be deal-breakers when implementing digital workplace tools. Microsoft knows this and now has a relatively robust approach to various security factors across the main platform, while also ramping up governance options for individual tools such as Microsoft Teams.

### Supporting factors

Risk and compliance factors tend to be deal-breakers when implementing digital workplace tools. Microsoft knows this and now has a relatively robust approach to various security factors across the main platform, while also ramping up governance options for individual tools such as Microsoft Teams.

Because of this, introducing Microsoft 365 and its tools can help with risk and compliance issues, including:

- providing capabilities and plugging gaps, thereby limiting the need for employees to use shadow IT solutions that might be high risk
- ensuring more work is carried out within the Microsoft 365 universe so it is discoverable, controllable and has an audit trail, with proper access control in place
- using Microsoft 365 credentials to support and secure robust authentication processes, for example involving multifactor authentication
- ensuring better control over mobile use of apps through AD/Microsoft-friendly mobile device management software, such as Microsoft Intune
- reducing risks by using AD credentials to align with overall processes around shutting off access to systems for people leaving the company
- leveraging the power of SharePoint libraries to ensure there is versioning control over documents.

Much of the argument above is about the general rationale for rolling out Microsoft 365 but it can influence what you choose to implement. For example, in most organizations, the use of the consumer version of WhatsApp on mobile devices is rife with multiple risks around security, safeguarding and GDPR. Launching a Microsoft Teams mobile app might not be at the top of your list in terms of what you want to deliver, but there may be a compelling business case to launch it if it can act as an effective WhatsApp alternative and reduce the associated risks.

### Summary

Element	Benefits	Opportunities	Challenges
<b>Risk and compliance</b>	<ul style="list-style-type: none"> <li>• Reduces risk around many different areas.</li> <li>• Ensures regulatory and legal compliance.</li> <li>• Allows companies to execute security policies.</li> <li>• Enables companies to meet standards.</li> </ul>	<ul style="list-style-type: none"> <li>• Reduce use of shadow IT.</li> <li>• More control over environment with audit trails, access control, etc.</li> <li>• Secure authentication.</li> <li>• More control over mobile apps.</li> <li>• Robust starters and leavers process.</li> <li>• Document versioning.</li> </ul>	<ul style="list-style-type: none"> <li>• Access to cloud solutions in some regulated industries.</li> <li>• Restrictions on mobile use.</li> <li>• Auditing and compliance issues.</li> <li>• Legal status of the workforce may limit access.</li> <li>• Influence of workers' councils or similar.</li> <li>• Data privacy and GDPR issues.</li> <li>• National government policies.</li> <li>• Level of trust from senior leaders.</li> <li>• Data dependencies, e.g. AD data.</li> </ul>



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## 5. Support and governance

Having the right support and governance in place can dictate which tools to launch and when.

### Experience with Microsoft

The general domination of Microsoft 365 and the Microsoft stack makes delivering a digital workplace using M365 tools a relatively easy and straightforward decision. Because of the ubiquity of Outlook and Microsoft Office, most IT functions are already going to have a licensing agreement with Microsoft in place. Many IT functions will also have solid experience of managing Microsoft products and, increasingly, of using Azure. Microsoft's partner ecosystem is very mature and extensive. The fact that so many organizations are on the M365 journey, with some proven success and high adoption, provides some comfort to IT functions and digital workplace teams that they will be able to execute and adequately support the organization's M365 journey.

### Product management and support resourcing

Tools within Microsoft 365 don't look after themselves; they need the right levels of ongoing resourcing to cover:

- implementation
- change management and launch communication
- technical support and development
- product lifecycle management
- business ownership and stewardship
- business support and adoption
- local site ownership, distinct from the central team.

Without the right support in place, it may not be beneficial to launch a particular tool. The different apps within the Viva suite require varying degrees of change management, implementation and set-up, as well as ongoing management and governance. Without the resourcing to cover these areas, Viva might not be as successful or sustainable as it could be. Having the right team and adequate resourcing can make all the difference. The DWG research report *Digital workplace management: Teams, structures and methods* details various aspects of product management and resourcing that influence decisions around tool use.<sup>8</sup>

### Other areas of governance

Ideally, tools that are launched will have adequate governance to be able to support value, minimize risks and offer a good experience, having in place, for example:

- adequate controls, monitoring tools and levels of access control over tools to stop misuse
- control of a site, group or space provisioning process to stop site sprawl (a common issue with Yammer and Teams)
- governance relating to which content goes where, e.g. in SharePoint, Yammer or Teams.

### Example: Digital workplace governance at Aviva

A common governance challenge for Microsoft 365 teams is dealing with the new tools that regularly appear on the platform and deciding if, when and how these should be launched to employees. **Aviva** has defined standards and a set process to minimize risks and ensure that such tools are properly supported.

The company has a clearly defined 'service fundamentals' checklist that covers all the criteria a tool must meet before being launched to the business. There is also an agreed set of processes related to launch, including:

- security assessment
- data privacy assessment that includes GDPR
- business and service impact analysis
- defined service and support model
- onboarding process with global IT care and adoption teams
- pilot conducted with an internal early adopter tech user group, called the 'Gurus', consisting of around 200 global volunteers, where feedback is gathered.

The team has launched various Microsoft 365 tools through the business using this approach.<sup>9</sup>

### Summary

Element	Benefits	Opportunities	Challenges
<b>Microsoft experience</b>	<ul style="list-style-type: none"> <li>• Comprehensive management and support for the platform.</li> </ul>	<ul style="list-style-type: none"> <li>• Leverage in-house IT experience of Microsoft &amp; Azure.</li> </ul>	<ul style="list-style-type: none"> <li>• Can create pro-Microsoft bias in decision-making.</li> </ul>
<b>Product management and support resourcing</b>	<ul style="list-style-type: none"> <li>• Support Microsoft 365 tools from a technical and business perspective through the product lifecycle.</li> <li>• Increase adoption and value.</li> <li>• Make a platform more sustainable.</li> </ul>	<ul style="list-style-type: none"> <li>• Create stewardship and ownership.</li> <li>• Put adequate support in place.</li> </ul>	<ul style="list-style-type: none"> <li>• Ensuring the right levels of resourcing are in place.</li> </ul>
<b>Other areas of governance</b>	<ul style="list-style-type: none"> <li>• Ensures a sustainable platform.</li> <li>• Reduces risks.</li> </ul>	<ul style="list-style-type: none"> <li>• Monitoring tools and access control.</li> <li>• Provisioning and lifecycle management processes.</li> <li>• Deciding where content resides.</li> </ul>	<ul style="list-style-type: none"> <li>• Inadequate governance and controls leading to issues such as site sprawl and content proliferation.</li> </ul>

## 6. Costs and licensing

Cost is always a highly significant factor in choosing whether to deploy any digital workplace tool – and it is a major factor in decision-making relating to Microsoft 365.

The bundling of core digital workplace tools such as SharePoint, Teams and Yammer into most M365 licences that would need to be in place to get access to Office and Outlook, makes their use highly attractive from a cost perspective; IT functions and digital workplace teams want to get the most out of their M365 investments. Procuring an alternative also takes time, effort and additional cost. The continued inclusion of tools such as Viva Connections at no extra cost makes their deployment even more attractive, while the potential to deploy SharePoint Online out of the box provides an opportunity to reduce reliance on additional intranet software. [BCD Travel](#) followed this option, although this decision was not made on cost alone.

However, there can sometimes be differences of opinion across functions; if Microsoft 365 comes out of the IT budget, then communicators or HR teams may be less invested in using it, particularly if this means accepting compromises on functionality and features.

When considering cost, it is always important to think about whether there will be any additional costs involved, particularly around technical development, implementation, change management or any additional licensing required. Introducing Yammer, for example, might appear logical from a licensing perspective, but there may be additional costs associated with change management. Rolling out Microsoft Teams to frontline employees might make a lot of sense, but you may have to pay for additional frontline licensing.

Some apps and capabilities also come at extra cost above and beyond the core Microsoft 365 licence. This is certainly the case for some of the Viva suite in terms of full access to Topics, Insights and Learning, although a new overall Viva suite licence is likely to make this a more viable option for some organizations.

When taking any decisions, it is important to have a view of what is included and not included in your licence agreement with Microsoft. This might sound obvious, but licensing can be complex and is not always transparent; larger companies built up by acquisition may have several licences running at the same time, and assumptions can also be made about what is available. It's important that teams based outside of the technology organization talk to their colleagues in IT, as this is likely to be where the relevant licensing information is held.

### Summary

Element	Benefits	Opportunities	Challenges
<b>Cost and licensing</b>	<ul style="list-style-type: none"> <li>Significantly reduce licensing costs.</li> <li>Get better ROI on Microsoft 365.</li> </ul>	<ul style="list-style-type: none"> <li>Launch apps at no extra cost.</li> <li>Reduce reliance on additional software.</li> <li>Launch a SharePoint Online intranet without in-a-box or SharePoint enhancer software.</li> </ul>	<ul style="list-style-type: none"> <li>Additional costs around change management, customization and deployment need to be factored in.</li> <li>Additional licences may be required, usually for frontline staff.</li> <li>Some features come at an extra cost, including in Viva.</li> <li>There may be differences in stakeholder opinion about cost-driven decisions.</li> </ul>



7. Other Microsoft 365 characteristics

There are also some overriding characteristics of the Microsoft 365 platform that present both attractive benefits but also particular constraints relating to its tools and channels.

Capabilities

Microsoft has continued to invest in the platform and its constituent tools that serve some of the aims of digital workplace teams, allowing them to achieve more straight out of the box. For example:

- **Multiple capabilities:** Microsoft Teams continues to add additional capabilities that can be delivered through it, for example unified communications and, more recently, live events.
- **Easier integration:** Integrating M365 and non-Microsoft tools together is generally becoming easier through standard sets of web parts and libraries of connectors.
- **Enabling intranet deployment:** Modern SharePoint Online has added more features that are ‘intranet-ready’, for example introducing home sites and the ability to create a global navigation.

The continued investment and intended future roadmap for different tools also offer confidence that the capabilities possible with a M365 digital workplace will continue to evolve and deliver value.

Constraints

The very characteristics that make Microsoft 365 attractive can also result in challenges. Its speed of evolution can make supporting users demanding at times, while in truth some teams find multiple capabilities present a ‘tyranny of choice’.

More specifically, there are some particular constraints from these platforms that can determine the detail of what can be achieved and how things must be set up. For example, to deliver Viva Connections, a SharePoint communication site must be set as the ‘home site’, which then determines some of the characteristics inherited by other SharePoint sites. But you can currently have only one home site per Microsoft tenant; and if you have two distinct entities operating within one tenant (as did [BCD Travel](#)), this can create some logistical challenges as both entities will need to inherit a common navigation. Microsoft has said that having multiple home sites is on the future roadmap, but it shows that sometimes organizations can’t achieve everything they want to straight out of the box.

Other challenges include missing capabilities in SharePoint and Teams, and the relative ability to deliver effective audience targeting, personalization or findability.

Summary

Element	Benefits	Opportunities	Challenges
M365 characteristics	<ul style="list-style-type: none"><li>• Meets future roadmap capabilities.</li><li>• Supports employee experience goals.</li></ul>	<ul style="list-style-type: none"><li>• Microsoft continues to invest.</li><li>• Tools continue to evolve and improve.</li><li>• Easy integrations between tools.</li><li>• Faster deployments.</li></ul>	<ul style="list-style-type: none"><li>• Pace of evolution outstrips support and adoption.</li><li>• Constraints around details of specific tools.</li><li>• Gaps in capabilities.</li></ul>

## 4

# Microsoft Viva.

Microsoft Viva was launched in February 2021 and, according to Microsoft, has already gained 10 million monthly active users and over 1,000 paying customers in its first year.<sup>10</sup> In 2022, many organizations were still experimenting with Microsoft Viva, particularly the services that are free and bundled within Microsoft 365 subscriptions. Throughout the year a number of new apps and capabilities were announced, with some becoming generally available, while others will be introduced later in 2023.

In this section, we take a deeper dive into the main capabilities of Microsoft Viva Connections as well as the other modules within the Viva Suite, as well as drawing some general observations. This section has been extensively updated from the first edition of the report which was launched in June 2022.

## General observations

### Microsoft Viva is not plug and play

Although Microsoft Viva uses artificial intelligence (AI), and some features, such as the Viva Connections feed, don't necessarily need additional ongoing management once set up, it is a mistake to think that Viva is 'plug and play'. To get value, most of the modules require thought, planning and ongoing governance and curation; Microsoft has also been emphasizing this message.

### Microsoft Viva is being integrated and embedded into the rest of Microsoft 365

In a similar way to other tools across the Microsoft 365 suite, Viva apps are being integrated seamlessly with the rest of the M365 platform. For example, Viva Topics cards can now be referenced in Teams discussions, Yammer threads, Outlook emails, SharePoint pages and Delve profiles; Viva Sales is delivered through both Teams and Outlook; web parts that originate from Viva are deployable in SharePoint. This process is likely to continue with deeper integrations as Viva is delivered beyond just Teams.

### Expect the Viva brand to become more visible

As adoption of Microsoft Viva rises and its features become increasingly integrated across the wider digital workplace, the Viva 'brand' is likely to become more visible. Some have speculated that, for example, Yammer will eventually be renamed Viva Engage to match the Viva app. It is conceivable that other Microsoft products that focus on areas of employee engagement could be folded into the Viva brand at some stage too.

### Expect more role-based Viva apps

Viva Sales is the first role-based Viva app, being aimed at those involved in the selling process only rather than all employees. We can expect more Viva role-based apps targeted at specific groups – for example, this might include managers or frontline employees.

### Expect more integration between the apps

When first launched, Viva did not particularly feel like a single platform, appearing instead to be a series of separate and distinct apps. However, we are seeing more integration between apps, with some capabilities such as People in Viva being available across more than one app. The Viva Connections home page is also starting to become established as a way to navigate between Viva apps.

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There is certainly some overlap between Viva Connections and intranet capabilities. However, Viva Connections doesn't really replace your SharePoint intranet.

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### Microsoft is adding connectors

Microsoft continues to add value to Viva with more new libraries of out-of-the-box connectors to common enterprise applications, such as ServiceNow and Workday. These particularly impact the ability to add learning content and systems surfacing in Viva Learning, as well as adding cards to the Viva Connections dashboard that can deliver content and transactional capabilities.

### There is a gap emerging between premium and free elements

Microsoft continues to offer some free elements of Viva apps, but with others being paid for. We believe a clear gap will emerge between the free elements and those that are premium.

### Licensing options may continue to evolve

Although some of Viva is bundled within Microsoft 365, much of it is paid for. To make it more accessible and attractive to digital workplace teams, Microsoft has created a per user licensing option that provides access to all of the apps, bar some of the more specialist features. As Microsoft continues to push Viva, it may be that more licensing options will be offered.

### Viva Connections doesn't replace your SharePoint intranet

There is certainly some overlap between Viva Connections and intranet capabilities. However, Viva Connections doesn't really replace your SharePoint intranet. Arguably, setting up a home site in Viva Connections in order to make the most of what it offers means creating something equivalent to a simple SharePoint intranet anyway. However, the new Viva Connections homepage may start to be regarded as more of an alternative to a SharePoint intranet homepage.

## Viva Connections

Microsoft positions Viva Connections as: *"a curated company-branded experience that brings together relevant news, conversations and resources in the apps and devices you use every day"*. In other words, it is trying to bring capabilities that are very close to that of an intranet homepage, but within Teams. Viva Connections comes bundled with most Microsoft 365 subscriptions at no additional cost.

Connections having features that may overlap with your intranet helps to deliver internal communications, and even arguably to connect you to the wider digital workplace (through the dashboard) – and also comes at no extra cost to most organizations' M365 licensing – it has received the most attention from DWG members. We therefore cover it in more depth than the other Viva apps and modules.

Viva Connections consists of the following main features:

- home site
- a new homepage experience (to be launched in 2023)
- dashboard
- feed
- resources
- mobile experience.

### Home site and new homepage experience

Currently, the homepage experience in Viva Connections is based on the contents of a SharePoint communications site that has been designated a home site and makes it viewable within Teams. However, in 2023, the default homepage experience will be a new Connections homepage that include elements of the home site, the dashboard and the feed. Organizations with an existing home site will be able to keep their current home site as the Connections home experience, or switch to the new homepage. Note that the new homepage is currently going to be desktop only.

The new homepage experience aims to offer a better and more attractive single entry point into the content surfaced via Viva Connections. It has a hero area with actions and reminders that are 'top of mind', the Connections dashboard, the Connections feed, and icons to reach the other Viva suite apps. It also includes all the Connections resources, with the ability to access the navigation, plus the addition of frequently visited and followed sites.

It appears there will also be opportunities to add custom branding to the Connections homepage, with Microsoft saying this will be able to be 'fully branded', making it more identifiable as a company-provided tool and positioning it more closely to the role of an intranet homepage where employees can surface whatever they need for their working day.

Another feature will be the ability to add multiple homepage experiences within one organization (and specifically on one Microsoft tenant), which will suit multibranded and complex organizations, and has sometimes been a barrier to introducing Viva Connections.<sup>11</sup>

### Dashboard

The Viva Connections dashboard consists of a number of cards that support the completion of various tasks; these may integrate with other apps and third-party solutions across the digital workplace, for example relating to logging and tracking a ServiceNow ticket, or viewing and requesting annual leave in Workday. Cards can also just focus on linking to content, including from third-party sites.

The cards on the dashboard can be targeted by Active Directory profile data organized into groups, such as role, location, market and division. These cards are similar to 'micro-apps' that sometimes appear within intranet homepages.

Currently, there are a number of cards available that can be configured and targeted to different audiences at the card level:

- various approvals including annual leave requests, expenses, etc.
- assigned tasks for individuals utilizing the Teams app
- custom cards designed through the Adaptive Cards framework
- shift and roster information for frontline employees via the Shifts Teams app
- Teams app card – opening up an existing Teams app
- third-party cards from a growing library of connectors to other enterprise systems
- top news card, for 'boosted' news delivered from SharePoint
- link to an external web source.

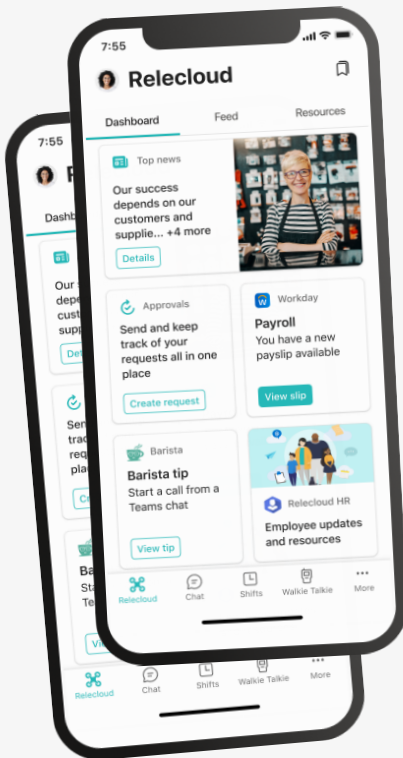
Initially, the dashboard was created to be consumed through Microsoft Teams and specifically within the Teams mobile app, for example targeted to the needs of frontline employees. However, there is now a web part which can embed the Viva Connections dashboard into your SharePoint home site.

### Viva Connections feed

The Viva Connections feed attempts to aggregate communications and engagement-led content across SharePoint, Microsoft Stream and Yammer, with each piece of content represented by a card. Viva Connections creates a personalized feed for the individual, which is driven by:

- audience targeting
- Yammer group memberships
- content popularity
- 'boosted' news from the home site (admins can set SharePoint to 'boost' their news)
- SharePoint sites a user has followed.

In addition, Stories from Yammer/Viva Engage will also be added to the feed.



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The Viva Connections feed attempts to aggregate communications and engagement-led content across SharePoint, Microsoft Stream and Yammer, with each piece of content represented by a card.

Besides being accessible through Microsoft Teams, the Viva Connections feed tends to differ from feeds you might find on an intranet homepage in three main ways as it:

- aggregates various sources, bringing together news items, conversations and videos (these content types are more likely to be presented in separate feeds on a homepage)
- is not curated by internal communications being instead driven by an algorithm – although internal communicators can influence it through boosted news; this can involve a loss of control that some communicators may find uncomfortable but does remove the need for active management
- is potentially unique for every individual as there are more factors influencing the personalization beyond profile-based content targeting.

A Viva Connections web part also means that intranet teams can easily embed the feed within a SharePoint page.

At **BCD Travel**, the team launched the Viva Connections feed web part on the intranet homepage in March 2022, labelled 'News selected for you'.

### Viva Connections Resources

Viva Connections Resources essentially brings an intranet-style global navigation into Microsoft Teams, which is displayed within the Viva Connections app as well as being the top item in the SharePoint app bar. Audience targeting can be applied to ensure that relevant resources are displayed.

Generally, intranet teams have three choices when defining the global navigation. They can either:

- inherit the navigation from the home site
- inherit from a defined hub navigation if that is also being used on the home site
- create a custom global navigation.

Both **Play'n GO** and **BCD Travel** have created a custom global navigation.

An additional capability on the roadmap will make it easier for employees to access frequently used sites and tagged resources within Connections Resources.<sup>12</sup>

### Viva Connections mobile app

The mobile experience in Connections displays the Dashboard, Feed and Resources, with the Dashboard as the default homepage. Users can switch between these across three tabs on the app. There are also some differences in the experience across desktop and mobile.

## Viva Topics

Viva Topics is a knowledge management solution that uses AI to automatically identify topics of interest across content and conversations, and helps to build topic-based pages around these, automatically adding relevant content and discussion threads to these pages. Although it is driven by AI and machine learning, Viva Topics is not positioned as a fully automated solution, but rather one that works best in conjunction with a curation process led by a subject matter expert (SME) or experts.

Viva Topics requires an individual subscription but is also bundled into the general Microsoft Viva licence.

Viva Topics includes the following features:

- Topic cards that provide a quick summary of a Topic with a brief description, experts and links, and can be viewed by hovering over when a Topic term appears, for example within a Teams discussion, SharePoint page or Outlook email
- Topic pages that can include summary information, acronyms, files, experts, conversations and related Topics, and can be reached by expanding a Topic card
- A 'Topic Center' to manage Topics.



Topic pages are initially put together by AI, but a SME can then curate the suggestions on the page to ensure relevancy and value. Each page has a relevant Topic card that can be referenced within Teams discussions (with details revealed when hovered over) and integrated into the Microsoft search. Suggestions for Topic pages are also driven by AI.

Since launching, Viva Topics has continued to have enhancements, including the integration of Answers in Microsoft Viva (described later in this section), as well as the ability to view Topics on a person's profile card (Microsoft Delve), the introduction of Topic categories, and additional analytics to suggest connected Topics.<sup>13</sup>

The digital workplace team at [Avanade](#) suggest that, to get value out of Viva Topics, you need to:

- have a large enough volume of documents for Viva Topics to analyse in order to discover Topics that will be relevant (they suggest a minimum of at least 20k documents within Microsoft 365, which may need to have sufficient density to be able to yield meaningful results)
- have a network of SMEs who agree to curate relevant knowledge pages
- open up Topics to a wide enough set of areas and big enough group of SMEs (they found value in this approach at Avanade)
- set up the necessary governance to assign Topic curators.<sup>14</sup>

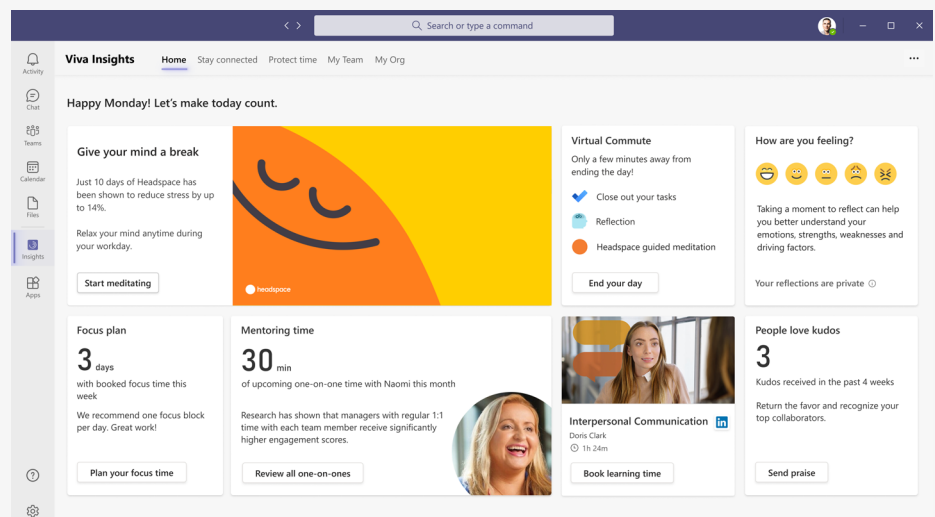
Getting the right number of Topics is key, but this may not always be straightforward. When the [Play'n GO](#) team first started experimenting with Topics, they received over 1,000 suggestions from AI. Meanwhile, at Avanade, when they were first piloting Topics, the team started out with a very narrow set of Topics with related experts, but actually found they got more value once they opened up Topics to a broader set of areas and involved a wider group of SMEs.

## Viva Insights

Viva Insights is another app consumed through Microsoft Teams, which delivers productivity and wellbeing analytics and insights at the personal, team and organizational levels, while also acting as a dashboard to perform related actions. Data privacy is a strong element within the platform, so personal analytics are kept private. There is also some use of the Viva branding in related insight briefings that are sent via Outlook.

Core features of Viva Insights include:

- a personalized dashboard with wellbeing and productivity-related analytics derived from use of the Microsoft 365 platform
- the ability to perform related tasks, such as send praise, book specific meetings with individuals, allocate 'focus' time in an Outlook calendar or use the Headspace app, which is integrated with Viva Insights
- a dashboard for team managers that also reveals analytics and insights relating to working patterns at the team level



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Microsoft has tended to emphasize the wellbeing aspects of Viva Insights, and the features designed to promote focus, connection with others, mindfulness and limiting working hours may align well with other health and wellbeing initiatives organizations are implementing.

- a dashboard aimed at leaders and HR functions, which reveals analytics and insights relating to working patterns at the organizational level
- access to advanced analytics, where teams can perform custom queries that analyse how groups are using their time, and how different demographics meet and collaborate, perform network analysis, etc.
- from 2023, some insights from the Glint employee survey tool will be available from Viva Insights (more details about Glint are covered below).

Since the initial launch, there has been an additional set of reports that focus on hybrid work and more effective meetings, through a Power BI template.

These include:

- a hybrid workforce experience report covering elements such as work-life balance and long working hours
- a meeting effectiveness report, providing an overview of meeting hours and behaviours.

Another new feature is a 'shared focus plan', which allows managers and team leaders to invite team members to book up to four hours of uninterrupted time per day.<sup>15</sup>

While access to some of the personalized dashboard comes with some Microsoft 365 subscriptions, the rest of the features incur additional costs.

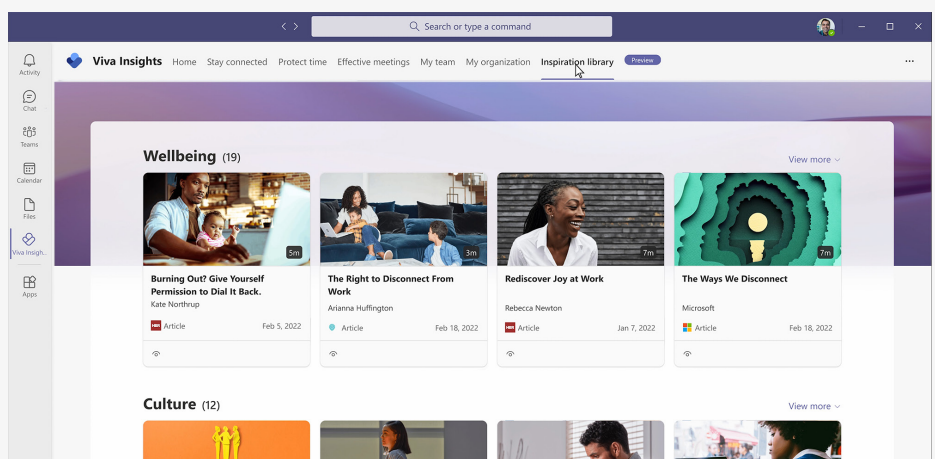
Microsoft has tended to emphasize the wellbeing aspects of Viva Insights, and the features designed to promote focus, connection with others, mindfulness and limiting working hours may align well with other health and wellbeing initiatives organizations are implementing.

The value of purchasing the team- and organization-level analytics will depend on what organizations are hoping to achieve and whether the analytics are actually going to be acted upon. As the numbers are derived from Microsoft 365, those organizations who are extensively communicating and collaborating with non-Microsoft tools may find less value.

When implementing Viva Insights, and to derive the most value from it, adequate planning is needed. Based on their experiences, the digital workplace team at [Avanade](#) advise:

- devising a stakeholder map to work out who is being impacted by Insights and in what ways
- having a detailed communication plan to activate the experience, in particular ensuring that any fears or misconceptions around data privacy are covered
- establishing well-considered business objectives (for example, around the behaviours you want to change) and then working on a measurement plan based on these.<sup>14</sup>

The team also emphasize the importance of considering all the issues around data privacy, fully understanding where Insights will pull its data from and identifying any underlying issues around who has access. For example, at Avanade, they excluded sensitive content from Viva Insights to mitigate privacy concerns and risks.



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## Viva Learning

In its current form, Viva Learning is not a learning management system or platform; essentially, it is an app that can bring together learning content from multiple different repositories into Microsoft Teams. Employees can then more easily discover this, share it with others and receive recommendations for relevant learning material. In order for Viva Learning to work, it is therefore recommended to have a base LMS.

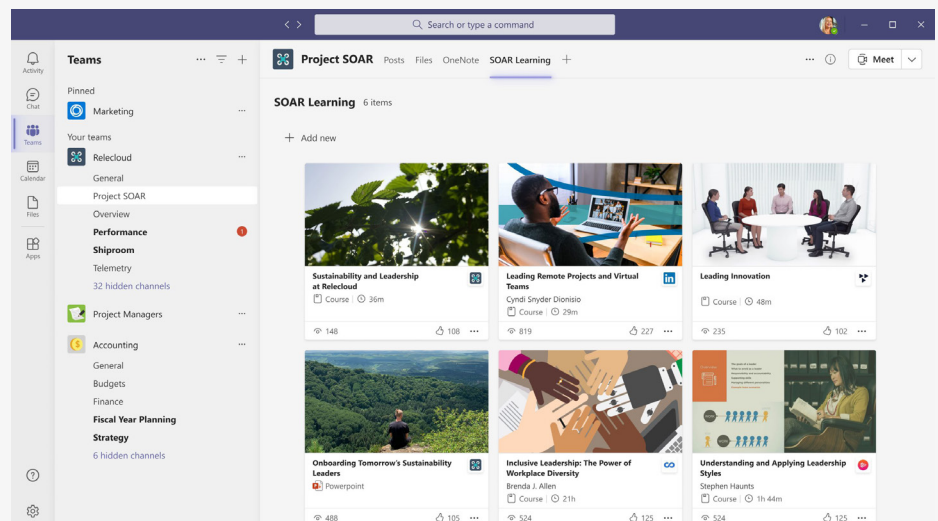
Core features include:

- ability to access Microsoft Learn and M365 training libraries
- access to the top 125 LinkedIn Learning courses
- ability to add a learning tab into different Teams channels
- option to surface organization-generated learning content within SharePoint through Viva Learning
- people can recommend courses to one another (for example, a manager to their team)
- a personalized learning dashboard for learners to see assigned, recommended, recently viewed and completed courses
- managers can track progress on different courses and see who has actually taken them
- integration with core learning content providers such as Skillsoft and learning management systems such as Cornerstone.

A number of additional capabilities were announced in October 2022 and although these aren't live at the time of writing they will be available soon<sup>16</sup>:

- the ability to create learning paths within Viva, grouping courses together which could be from different base sources
- the ability for individuals to create their own personal collections of learning content
- adding a permissions layer to learning content within Viva Learning, so users can only see learning to which they should have full access
- the ability to view learning content via the Viva Learning mobile app
- enhancements to Viva Learning's integrations with LinkedIn Learning Hub allow employees to access content from both systems and admins to surface content from LinkedIn Learning Hub, including custom-made content.

Viva Learning content is also now integrated into the Viva Connections homepage, as well as the briefing email from Viva Insights.



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The full Viva Learning suite of capabilities, including the out-of-the-box integrations, course recommendations and progress tracking, comes at a cost; however, a limited version of Viva Learning comes with some Microsoft 365 licences and includes the basic capabilities.

The advantages of Viva Learning include being able to:

- bring learning material and recommendations more directly into the flow of work, rather than in a separate repository or repositories
- make Microsoft's own learning material more accessible in Teams
- enable easier access to learning at the point of need, so it can be searched for
- facilitate social learning – where one person shares learning material with another
- make it easier for managers to recommend learning to individual members of their team and track progress
- allow users to track their own learning via the dashboard.

In an expert blog for DWG, Patrik Bergman, DWG Associate and Digital Workplace Architect at Play'n GO, discussed the features that Viva Learning doesn't offer and that are more likely to be available through your LMS or learning experience platform (LXP). However, he does advise organizations to investigate the possibilities offered by Viva Learning: *"If you don't have an LMS/LXP today, then Viva Learning could be an excellent start for your formal and social learning via MS Teams. If you do have an LMS/LXP, you can investigate whether that platform is stronger than Viva Learning, including the MS Teams integration, which several platform vendors have. For some of you, the LMS/LXP will far surpass that which Viva Learning offers, while for others an integration of the LMS/LXP into Viva Learning will be the best option"*.<sup>17</sup>

## Viva Engage

Viva Engage was announced in July 2022. Essentially this is an upgrade of the previous Yammer Communities app designed for Microsoft Teams – and it's now generally available to anyone with a M365 licence or subscription to Yammer. Customers previously using the Communities app have been automatically upgraded to Viva Engage.

While there are some new features in Viva Engage that are not currently available in the general Yammer platform, many have observed that Viva Engage is essentially a Yammer app, yet the branding of Yammer has not been changed. Initially, this caused some confusion in the market and led to speculation as to whether Yammer might also be rebranded at some stage.<sup>18</sup>

New features in Viva Engage include:

- a personalized homepage, which uses AI to bring in a feed of conversations
- a new 'Communities Hub', which encourages users to explore communities to join and features recommendations; it also has a new menu allowing users to favourite communities and access their most frequented ones
- 'Storylines' and 'Stories' (more details below)
- Leadership Corner
- Campaigns, although this also may be part of Viva Amplify.

These features all expand the power of Viva Engage and Yammer, particularly in the area of leadership communications.<sup>19</sup>

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One of the most exciting new features to be introduced across both Viva Engage and Yammer is 'Storylines'. This is essentially a personalized feed within Yammer.

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### Storylines and Stories

One of the most exciting new features to be introduced across both Viva Engage and Yammer is 'Storylines'. This is essentially a personalized feed within Yammer. Storylines allows an individual to post to their profile, which their followers can then be notified about. This means that Yammer becomes more of a social network, in the same vein as Facebook or Instagram, with people now able to follow each other as well as become members of communities.

'Stories' is another new feature that appears on both Viva Engage and Yammer. This allows users to add photos, photo montages or very short video clips, and then to annotate these with elements such as stickers. Again, Stories has elements in common with external social media platforms like Instagram and TikTok, with Facebook also having introduced this feature. Stories appear in a horizontal carousel at the top of someone's Storyline. However, unlike in Instagram, they do not disappear but stay there permanently.

The combination of Storylines and Stories enables both leaders and employees to:

- share updates, experiences and perspectives to followers
- follow others for interesting Storyline posts
- grow their personal network and make connections
- provide a more rounded view of a person and help people to get to know each other
- encourage those serendipitous connections that can prove very valuable
- encourage open sharing of knowledge, answers and ideas.

It also allows leaders to humanize themselves by showing their activities close up.

### Leadership Corner

Leadership Corner is a feature in Viva Engage for staff to engage with leaders, for example through facilitated Ask Me Anything sessions. It rolls up the Storylines and Stories from a personalized group of leaders for an individual based on their profile – for example, from a division, country or function, as well as leaders from the overall C-suite. It also brings analytics and reporting to measure engagement and track success.

### Campaigns

This supports campaigns that are delivered through Yammer or Viva Engage and automatically rolls up all the Stories, Storyline posts and community posts that are tagged with a campaign hashtag. It also displays elements such as a campaign sponsor. Again, there are numerous analytics to measure the success of a campaign, as well as insights, for example identifying people who have contributed the most posts.

### Viva Goals

Viva Goals is an OKR software app, based on Microsoft's acquisition of Ally.io, a leading OKR solution. Ally.io was founded in 2018 and acquired by Microsoft in late 2021.<sup>20</sup> OKR software helps individuals, teams and organizations to track their success against defined goals and can help place individual and team actions and projects in the wider context of organizational aims.

Like other Viva tools, Viva Goals is principally experienced through Teams, bringing an OKR capability that potentially complements other Viva tools, particularly Viva Learning. Viva Goals has been generally available since August 1, 2022 and is bundled in with the general Viva licence, as well as being available separately.

Viva Goals brings a number of new capabilities, including:

- defining and creating OKRs, either from scratch or by using various templates
- viewing OKRs at the individual, team and organizational level
- aligning OKRs with project tasks and outcomes, including those defined in popular software like Jira, Salesforce and Zendesk, with many integrations available
- creating custom OKR dashboards that can be used in anything from town hall meetings to project reviews or one-to-one appraisals
- viewing and discussing OKRs and dashboards within Teams conversations.<sup>18</sup>



For anyone with a Microsoft Teams-driven digital workplace and wanting to use OKR software, or with the need for OKRs in the everyday flow of work, Viva Goals looks worth investigating. It also complements other areas of employee experience and HR that are touched upon by Microsoft Viva. Play'n GO was already researching acquiring OKR technology (with Ally.io as a potential solution) and may now be able to introduce this via Viva.

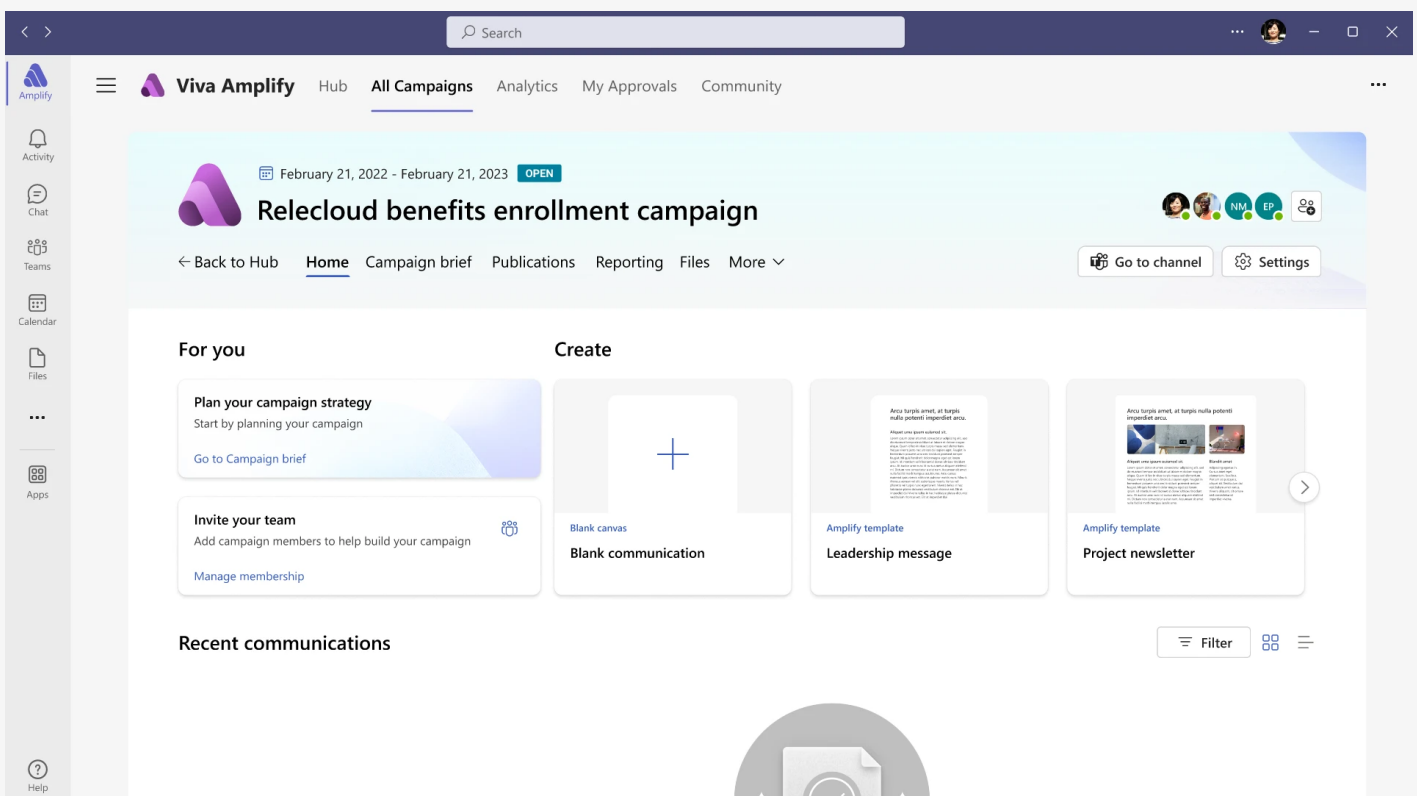
## Viva Amplify

Microsoft Viva Amplify is a new app announced in September 2022 that Microsoft says “empowers employee communication teams and leaders to elevate their message and energize their people” and allows you to “plan, create and analyze all your communications in a single hub.”<sup>21</sup>

More specifically, Viva Amplify aims to:

- support communicators by centralizing employee communications within a single space
- allow for the creation of communications within the tool through an easy and intuitive editing experience
- provide AI-powered writing guidance and tips for different parts of the organization including leaders and corporate communications
- help communicators push messaging to multiple channels – likely to include SharePoint, Teams, Yammer, Outlook and potentially non-Microsoft channels
- allow communicators to create and manage campaigns from one place covering elements such as defining goals, previewing posts across different channels and scheduling
- facilitate approvals for employee and campaign communications
- allow stakeholders to gain access to metrics to plan better communications.

Amplify looks as if it will almost certainly include the Campaigns functionality already described that is also available via Viva Engage. It is set for release sometime in 2023 and, at the time of writing, Microsoft is inviting organizations for private preview and testing.



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## Glnt

Glnt is an enterprise-wide employee survey and feedback tool that is already being offered as an add-on to Microsoft Viva at an additional fee. Previously provided by an independent software vendor, Glnt was acquired by LinkedIn in 2018 and subsequently moved into the Microsoft family when LinkedIn was acquired. The Glnt tool will be fully brought into the Viva suite in 2023 to become a 'core part' of the offering, although it is not clear what this will look like or whether it will be as a separate app.<sup>22</sup> It is not inconceivable that it will be branded as a premium part of Viva Pulse (see below), although this is completely our speculation.

Microsoft positions Glnt as a tool to: *"capture valuable employee feedback and translate insights to actions, helping managers and teams to measure and improve the employee experience"*.<sup>23</sup> Glnt allows you to create surveys and gather feedback, and then monitor this in real time covering aspects such as engagement, culture, productivity, DE&I, and more. It can cover established talent management and appraisal processes such as 360-degree feedback and provide ongoing any-time feedback.

Glnt comes with a variety of reporting features such as the ability to compare a team with organization-wide results. There is a reporting integration with Viva Insights to interpret results too. There are then suggested actions for HR and managers to share with teams, for example through integrated learning content from LinkedIn Learning, and even 'nudges' for managers to act on the results.

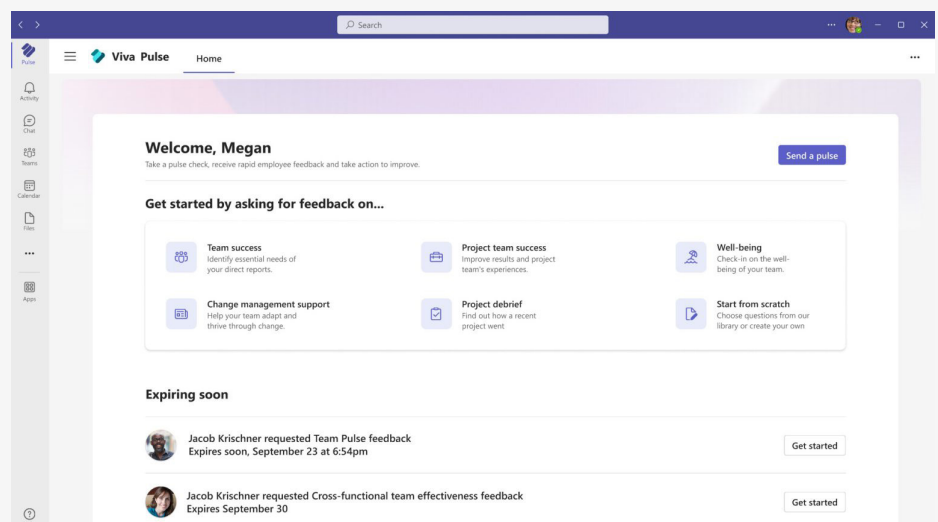
## Viva Pulse

Viva Pulse was announced in September 2022 as a new module to be part of the Viva suite that will act as a feedback tool for managers and team leaders, allowing them to gather both regular and anonymous feedback through Microsoft Teams.<sup>21</sup> Although not yet launched or even in preview at the time of writing, it appears that Pulse will help managers to create, launch and analyse feedback surveys through a number of different features including:

- survey templates
- 'research-backed' questions
- the ability to launch the survey from within the tool
- aggregated responses
- analytics.

Viva Pulse will also then make suggestions for learning and actions, as well as suggested next steps for the manager, which are likely to be AI-driven and could have the potential to link up with other modules like Viva Learning, Viva Goals and Viva Engage.

Viva Pulse is a distinct offering to Glnt and is described as 'complementary'. The announcement also hints that Glnt is being positioned as 'company-wide' while Pulse is aimed at the team level. With the overlap in functionality, it is possible there could be some potential integration between the two in the future, although this is only our speculation.



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## Viva Sales

Viva Sales is the first in a series of 'role-based' Viva apps targeted at particular groups rather than all employees. Viva Sales is positioned as a 'seller experience application' rather than a general employee experience app, so is designed for those in roles that involve sales and business development.<sup>20</sup> It aims to bring sales information closer to everyday work processes, as well as to support better capture of customer data.

One key selling point is that it uses AI to facilitate the automatic capture of data into a customer relationship management (CRM) system, reducing the need for manual data entry. Viva Sales presents an intriguing option for organizations that use Microsoft 365 for sales activity but struggle to keep their CRM systems up to date, or where CRM data remains hidden from the systems where most of the sales activity takes place.

Viva Sales features include:

- viewing CRM data while in Outlook and Teams, which can provide valuable side-by-side context to conversations about sales and prospects, as well as the ability to find specific contact details or opportunity information
- providing connectors for both Salesforce and Microsoft Dynamics to cover two of the major CRM platforms on the market
- creating a new contact in your CRM system from within Teams or Outlook
- analysing opportunities through a new AI facility (Sales Conversation Intelligence), which examines conversations and meetings with customers on Teams to provide summaries, sentiment analysis and suggestions for follow-up actions
- sharing CRM information on Teams to enable conversations, again providing more contextual information about sales and opportunities.<sup>18</sup>

The screenshot displays the Microsoft Outlook web interface. On the left, the navigation pane shows folders like Inbox, Drafts, Sent, Deleted, Junk, and Archive. The main pane shows an email thread titled "[EXTERNAL] Printers Catalog". The email is from Alberto Burgos to Daisy Phillip, with Kathryn Murphy and Ruth Bengtsson in the Cc. The email content discusses a printers catalog and a vacation. On the right, the Viva Sales app sidebar is visible, featuring a "Welcome to Viva Sales!" message and prompts to sign in to Dynamics 365 and Salesforce CRM.

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## Viva capabilities

Microsoft has also announced a number of new ‘capabilities’ within Microsoft Viva that are not restricted to just one of the apps, so are helping to make Viva feel more like a coherent single platform for both users and administrators. However, what is an ‘app’ and what is a ‘capability’ is fuzzy, and it is possible that a capability, such as People in Microsoft Viva, may also end up as a separate app.

### Briefing email

The Viva briefing email is something that many of us have received in our inbox; it includes useful (and less useful) reminders and nudges based on our interactions using Microsoft products. The briefing email is being revamped to include cards with calls to action to interactive elements, for example relating to booking time left in your Outlook calendar, or attending a relevant learning event.<sup>21</sup>

### Common navigation

A left-hand navigation for Microsoft Viva is being introduced in order to allow employees to navigate between different Viva apps. This will be dynamic and display only the apps to which an individual has access. It will also provide automatic prompts to suggest Viva apps that have yet to be installed by an individual.<sup>11</sup> We think this, combined with the new Connections dashboard, will be a major step forward in presenting Viva as a single, unified platform to end users rather than a series of disparate apps.

### Answers in Microsoft Viva

‘Answers’ in Microsoft Viva takes a structured approach to Q&A, providing a place for employees to ask questions, find answers that have previously been given and seek responses from SMEs. Answers uses AI to identify the experts who might be best placed to answer a question, but also recommend similar questions topics, experts and solutions. Users can follow topics and also get notified when questions or answers are provided.

Answers will be available through Viva Engage and also Viva Topics, so answers can appear on a Topics page. There are plans to enable integrating other answers from systems such as ServiceNow. Again, there are multiple useful analytics, such as who is asking and answering questions, surfacing experts who perhaps weren’t previously recognized, and more. Answers will be made available in early 2023.<sup>24</sup>

### People in Microsoft Viva

‘People in Viva’ is a new capability that helps employees to navigate an org chart to discover other employees, make connections and find experts. Microsoft says this will be *“available through Microsoft 365 profile cards and as a new app”*, so it does appear that it will be a separate app within the Viva suite.

People in Viva provides an interface to navigate your organizational chart with people represented by profile cards that offer a link to a full profile, which we assume will be based on Delve. You can view the direct reports to a person just like an existing org chart, but then there are filters to search, for example using information from other Viva apps such as Viva Goals (OKRs), but also on location, areas of expertise, role and even if they are present in the office, a feature which could be useful to support hybrid working. People in Viva will be introduced in 2023.<sup>25</sup>

## 5

# Case studies.

## Launching a modern SharePoint intranet and Viva Connections at BCD Travel.

### About BCD Travel

*BCD Travel is a global travel management company providing a range of corporate travel solutions. The company has a highly complex structure, including multiple business lines, and has operational ownership in 30 countries.*

In June 2021, the company launched a brand new intranet based on SharePoint Online, utilizing out-of-the-box modern SharePoint; since then it has also launched Viva Connections. We spoke to Beth Gleba, BCD Travel's Senior Director, Digital Workplace, about their work in building a digital workplace built on the M365 platform. (Beth is also a content producer, researcher and consultant at DWG.)

### A new intranet

At the start of 2020, BCD Travel used an 'in-a-box' intranet or SharePoint enhancer product that worked alongside SharePoint in order to deliver a global, modern intranet. However, when COVID-19 hit, it forced the intranet team into a rethink.

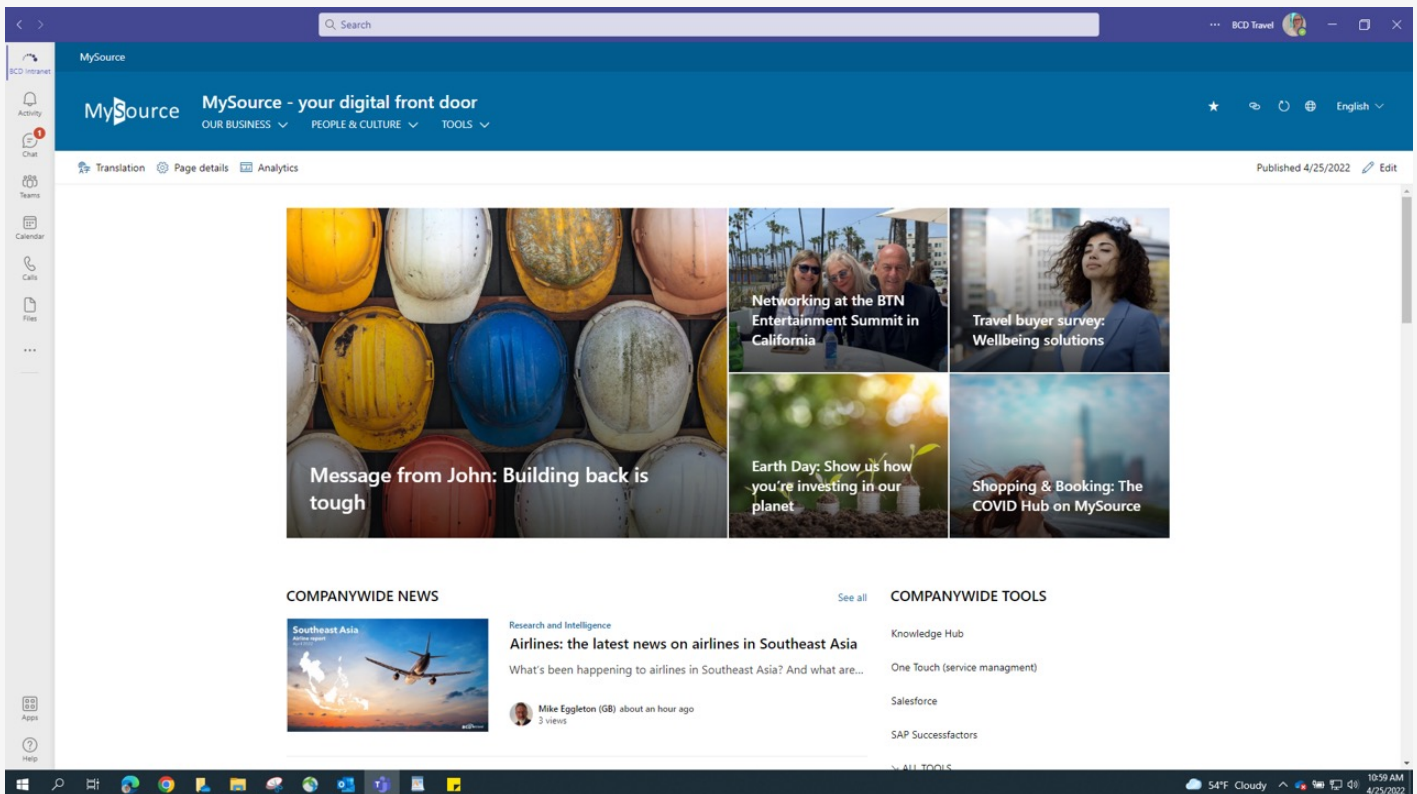
Beth Gleba explains: *"The pandemic hit the travel industry hard and we were forced to reduce our costs. The intranet enhancer product we were using wasn't really delivering value, so we decided to relaunch our intranet using SharePoint Online straight out of the box, saving us a significant amount of money. We've been surprised at how much we can do! We have lost some flexibility over branding, but gained many capabilities, such as the ability to easily integrate collaboration."*

Working over the course of a year, the intranet team designed an intranet that aims to be:

- the employee digital front door to a myriad of systems in use throughout the company
- the company-wide news centre, covering global, regional and country-level communications
- a front end to employee support, including IT and HR services
- the company-wide 'employee connector'.

Finally launching in June 2021, the new intranet is highly personalized, with navigation and content personalized to more than 35 different groups, reflecting BCD Travel's highly diverse workforce and complex structure.





**Figure 1:** The BCD intranet homepage experienced through Teams via Connections.

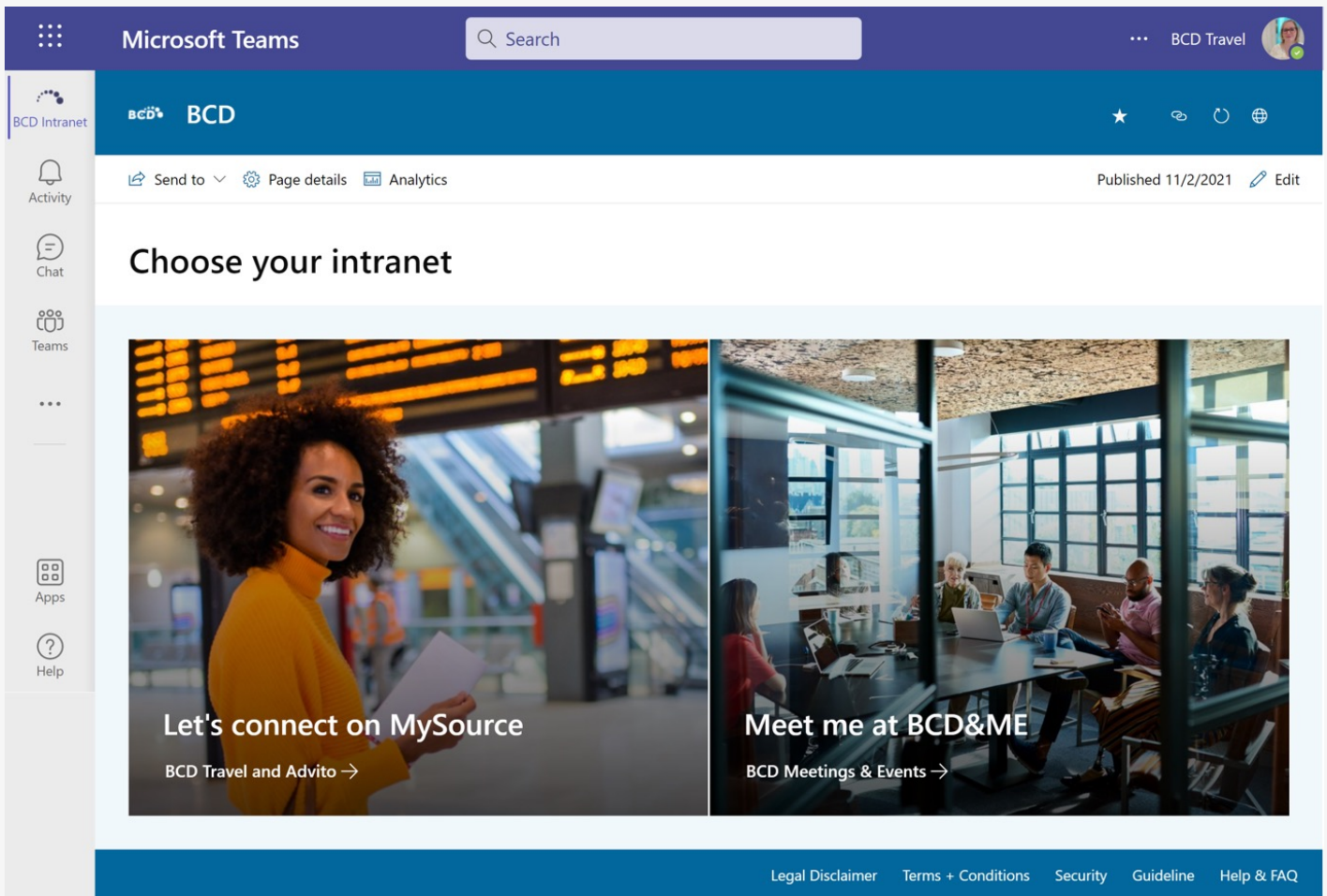
### Launching Viva Connections

Since the launch of the intranet, the team have continued to leverage their investment in Microsoft 365, exploring the potential of other tools. For example, despite BCD Travel using Chatter for social collaboration, the digital workplace team have launched a number of pilots for Yammer use, focusing on enterprise-wide conversations on topics such as wellbeing and sustainability. Feeds from these groups have been embedded into dedicated SharePoint intranet pages.

The team have also launched Viva Connections, allowing the SharePoint intranet to be accessed within Microsoft Teams, which continues to have high usage throughout BCD Travel. The idea behind this is to allow the intranet to be easily accessible from whichever system people are working within, supporting the delivery of relevant, personalized communications and content, while also driving good adoption.

### Challenges

Setting up Viva Connections means intranet teams must establish a SharePoint modern communications site as a 'home site'; this decides the default intranet homepage that employees will see within Teams, as well as the default global intranet navigation and branding. However, this process proved more challenging than expected.



**Figure 2:** The home site experienced through Teams via Connections – it is effectively a landing page to two different intranet homepages.

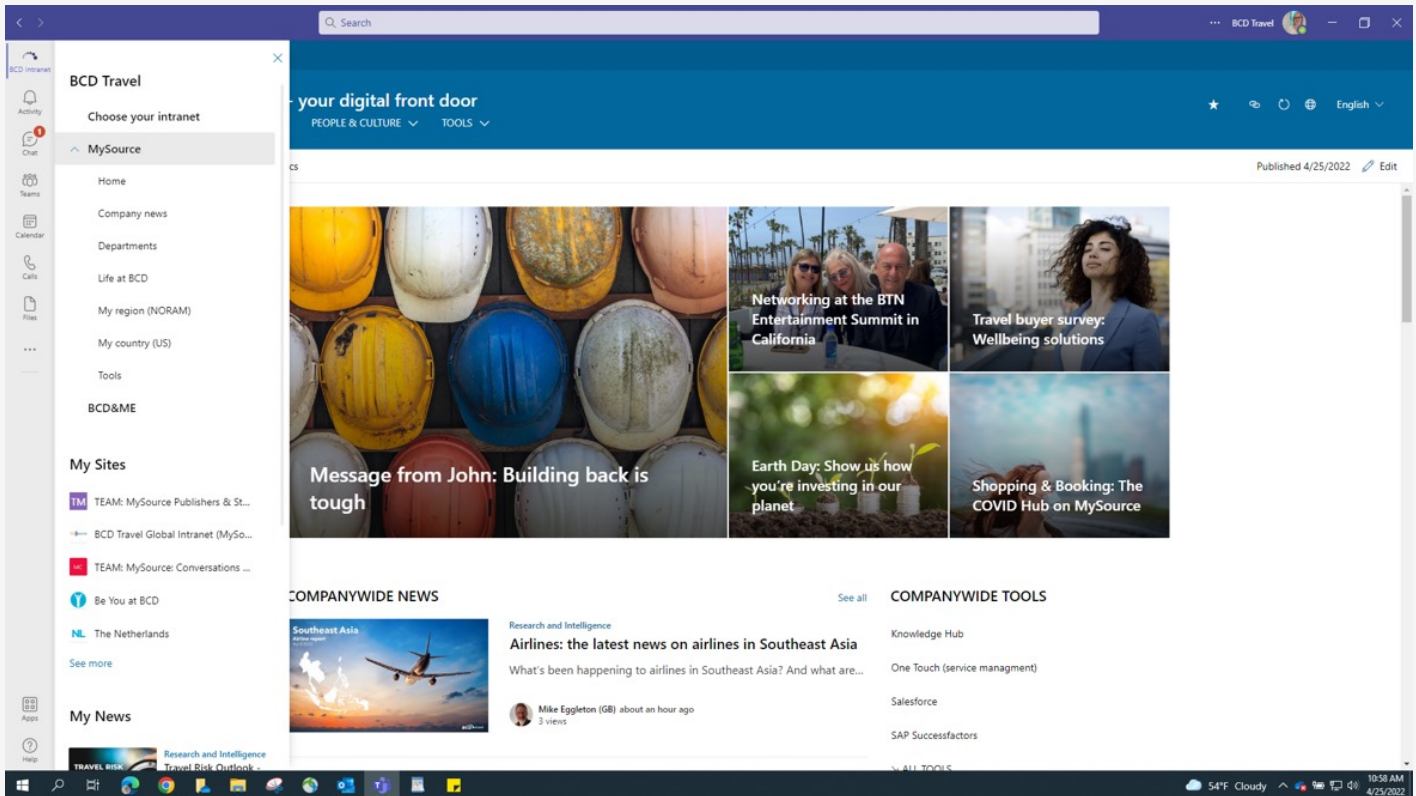
Beth explains: “One of the issues with Viva Connections is that you can only set one home site per Microsoft tenant. At BCD, two business lines share a tenant: BCD Travel and its meetings division, BCD Meetings & Events. The Meetings business has a separate intranet (BCD & ME) based on classic SharePoint. Because there are two intranets, we had to create a stripped-down home site that basically acts as a linking page to both intranet homepages. It’s a workaround; ideally, we would have two separate home sites and therefore two separate Viva Connections experiences.”

Within Viva Connections, it is possible to either set the ‘global navigation’ to default to that of the home site or instead to a separately defined customized navigation; because of the limitations of their home site, the team have opted for a customized global navigation that takes BCD & ME users to their homepage, while BCD Travel users are taken to a wider selection of content within their new SharePoint Online. Beth acknowledges that this is a “little messy” but it has been a practical workaround that has allowed the team to move forward with Viva Connections.

### Navigation

With Viva Connections launched in September 2021, employees can click on the top-level item of the standard menu within Microsoft Teams to view the home site content and reveal the ‘global navigation’. This same global navigation is also available in SharePoint by clicking on the top item of the left-hand vertical SharePoint app bar, which appears on every SharePoint site. While this brings some consistency across Teams and SharePoint, Beth has some general concerns about the SharePoint app bar where employees can also access news, sites and documents: “I wish I had more resources to teach people about this bar. It feels like it should be easy and people should just understand it. It’s a little bit invisible – some users never click it, while others get confused.”

More specifically, the list of SharePoint sites does not delineate between those sites that make up the intranet estate and those that don't; for intranet managers and digital workplace teams who usually try to design, manage and control the intranet navigation to support findability, this does take a little getting used to.



**Figure 3:** The global navigation experienced through Microsoft Teams.

### Analytics

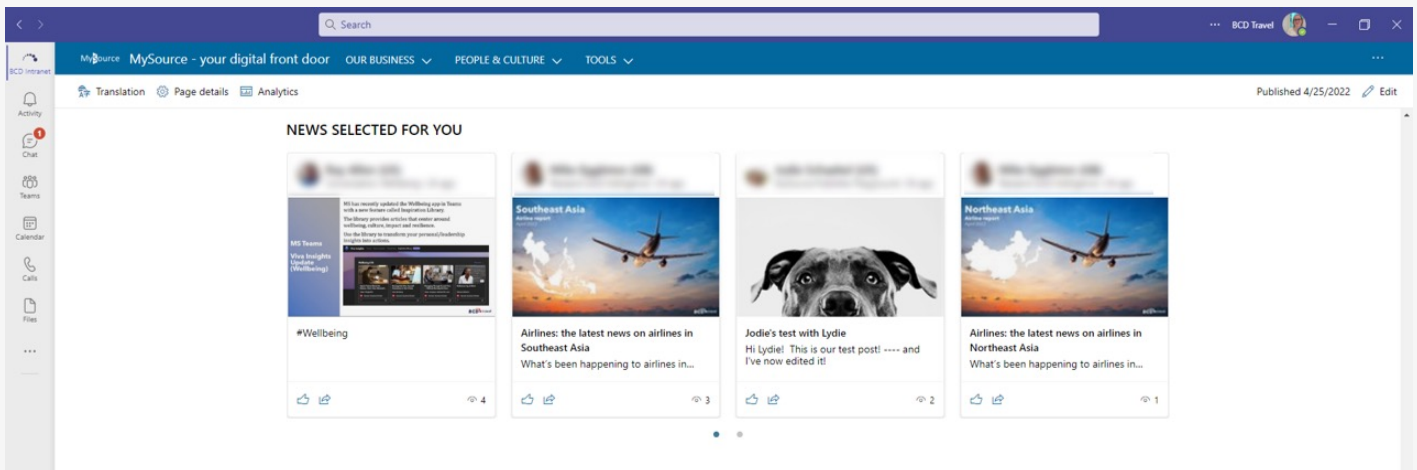
BCD Travel is happy with the new out-of-the-box analytics in SharePoint Online, with metrics at the site and page levels clear and easy to access. However, there are some challenges with Viva Connections around analytics that do not fully capture the system in which employees are viewing content. Beth explains: *“Ideally, I'd like to know how many people are viewing content through the browser versus via Teams. Microsoft has greatly improved the page-level analytics on SharePoint, but not being able to know how people are experiencing it is a big barrier to me investing resources.”*

### Personalization and content targeting

Because of the complexity of BCD Travel, personalization and audience targeting are major elements in the new SharePoint intranet. Targeting is applied to the main intranet navigation but also to the global navigation experienced through Viva Connections, as well as news and pages, driving relevance and enabling communications across different regions and locations.

Preparing for personalization involved a considerable amount of foundational work, defining the distribution lists required from a communications perspective, which have resulted in the creation of several dynamic Azure AD groups. Beth comments: *“We have invested a lot in preparing the groundwork for audience targeting. I think that's been essential in letting us have the building blocks in place to make both the SharePoint intranet and Viva Connections work well.”*

Even here, much thought has gone into how these groups are structured; for example, modern SharePoint Online currently allows you to create targeted navigations for up to 10 groups only, so ensuring that some more granular country lists roll up to different regional groups has enabled effective targeted navigation, at least at the regional level.



**Figure 4:** The Viva Connections feed on the intranet homepage (renamed 'News selected for you').

### The Viva Connections feed

The latest feature to be introduced by the intranet team is embedding a Viva Connections feed web part into the intranet homepage. This uses AI to deliver a personalized feed covering SharePoint pages and items, Yammer discussions and Stream videos. The feed is labelled 'News selected for you' and, following a pilot, was made live in March 2022. The feed can also be accessed via Viva Connections.

Items in the Connections feed are ranked based on various factors, although the team have not yet configured the ability to 'boost' homepage news items in the feed as the workaround solution for their home site does not feature any intranet news.

The team have also not yet fully investigated the potential for the Viva Connections dashboard. One of the reasons for this is that most BCD Travel employees are deskbound and do not use a mobile experience. However, the team plan to leverage the dashboard as they learn more about Viva Connections and its ability to deliver targeted transactional features.

### Improving the digital workplace

Overall, like many other aspects of the new BCD Travel intranet and digital workplace, the team will continue to leverage Viva Connections and SharePoint Online, monitoring current activity and making improvements based on feedback. *"It's been a very exciting learning curve,"* reflects Beth, *"and we're getting great feedback from our employees as our digital workplace is getting better and better!"*



# Case studies.

## SharePoint, Teams and Microsoft Viva at Play'n GO

### About Play'n GO

*Play'n GO is an online gaming company with approximately 600 employees across international locations including Sweden, UK, Hungary and the Philippines. The company has a digital workplace based on Microsoft 365 and uses modern SharePoint communication sites for an intranet, as well as Microsoft Teams.*

The company's digital workplace also aims to support a strong employee experience. Niclas Dahl, Digital Workplace Architect, comments: *"The digital workplace must always be user-centric. My role is to help people out and to leverage Microsoft 365 tools in their daily work. There's definitely a spirit where we want to create the best user experience."*

### Launching Viva Connections

Microsoft Teams is well adopted within Play'n GO. To take advantage of this, the team have launched Viva Connections to allow users to view SharePoint content within the Teams environment.

Niclas says: *"We use SharePoint as our intranet, with communication sites for global functions and departments. We try to connect them with different hubs to roll up information. When Microsoft launched the home site function, we swapped that for our root site in order to display a new modern communication site and enable us to be ready for Viva Connections."*

This home site features a roll-up of global news, events, people news and even some Office 365 elements from Outlook with an inbox and calendar, although these are being reviewed due to privacy concerns.

Niclas acknowledges that there is still some work to do to streamline the intranet: *"We're looking to create a more centralized and streamlined version where users get information and content that is relevant to them based on what they are working on."*

However, the ability to view the intranet homepage through Teams is providing value. Niclas comments: *"The end goal is that people should be consuming the SharePoint intranet through Microsoft Teams. It's the main hub for collaboration and much of our daily work. We want to make the intranet an integral part of it so that you don't have to leave Teams to read news or articles."*

### User experience issues

In launching Viva Connections, the team have observed some user experience issues, particularly when comparing accessing SharePoint intranet content through Teams rather than the browser. For example, if you are working in Teams and want to look up some information via Connections, you can't always open a new window without interrupting your current Teams view, space or conversation.

Navigation can also be confusing. At the moment, the team use the SharePoint app bar as the global navigation within Connections rather than the home site navigation as they didn't want that to be inherited across all the other SharePoint sites; it was felt there are simply too many communication sites throughout Play'n GO for this inherited navigation to be successful.



When users come into Viva Connections, they have to click twice to get the menu to appear – once via the Viva Connections button and then again after the home site has been displayed, something that has caused some confusion among users. When navigating different sites through Connections, the appearance of hub- and site-level navigations used to jar, so the hub site navigation has basically been removed, while department sites use a hover navigation. *“It felt too much with navigation on navigation on navigation!”*, remarks Niclas.

### Viva Connections dashboard

At the moment, the team don't utilize the Viva Connections dashboard but see great potential in it. Niclas says: *“It should be possible to personalize the experience for users. I want the dashboard to focus on action items, like you have a task or approval waiting from across different systems. And if you know the dashboard is clean, then you know there's nothing you have to follow up on.”*

### Internal communications

To extend the popularity of internal communications, news items are posted across both Teams and the SharePoint intranet. Niclas explains: *“We want to push messages to both systems. We create a SharePoint news item but then also add a message in Teams with a link to the story. Because our global company channel has a tag for the whole organization, we can create a notification for everybody. They get a little red dot and know a new story is there.”* This has some advantages over Viva Connections where there is not currently an equivalent notification feature.

Cross-posting in this way has been successful in driving reach and engagement. Niclas comments: *“The good thing about pushing a message through Teams is that the number of reactions and comments are way higher and the reach is much greater. When it's only on SharePoint the engagement is nowhere near the level we get also posting on Teams.”*

### Other Microsoft Viva apps

The team at Play'n GO are also investigating the potential of the other apps across Viva Connections. Niclas comments: *“I think Viva Topics has the best potential to really deliver the information you need on specific subjects. But there's also a lot of work to do because it needs to be curated. When I tested it, it suggested over 1,000 different topic suggestions!”*

Viva Learning is also being evaluated, but the team feel there are a lot of different elements that need to be added to get real value, including a learning management system. It also comes with additional licensing costs. Niclas sees potential but it needs to be a more personalized experience: *“It just pulls in different courses from everywhere, but it doesn't give me the ability to say I want to see this or that type of material.”*

Meanwhile, Viva Insights has been enabled but the team are still investigating the best use. Niclas says: *“It's a pretty nice feature. I'm most interested in the organizational insights, but I haven't gotten them to work properly yet – and to get them to work you have to have licences across all users, so it comes at a cost.”*

# Case studies.

## Using Microsoft Teams and Viva Connections at Avanade

### About Avanade

Avanade is a global IT consulting and implementation company that provides a range of professional services around the digital workplace. Employing 56,000 employees globally, the company is principally focused on the Microsoft stack and is co-owned by Microsoft and Accenture.

Avanade is focused on advancing employee experience with its clients, but also within the company itself, using a range of tools such as SharePoint, Microsoft Teams and Microsoft Viva.

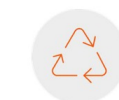
Avanade has developed its own employee experience platform model called the 'Workplace Experience Operating System', which "empowers hyper-personalized employee experience at scale". It includes a focus on 'moments that matter' through the employee lifecycle; the commitment to being built upon insights and analytics; and a foundation of improvement and evolution.<sup>26</sup>

From an IT perspective, digital employee experience is delivered following a set of principles:

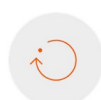
- **Connected and intuitive services:** ensuring apps are easy to use and introduced with a holistic view in mind.
- **Only what matters:** ensuring value for the technology and tools introduced.
- **User context driven:** ensuring the technology is deployed from a user-centric point of view and recognizes the needs of different groups.
- **Enable employees where they 'hang out':** making sure tools are accessed directly within the flow of work.
- **Personal choice:** allowing some choice for employees based on their preferences and working plans.<sup>26</sup>

### Avanade Workplace IT Experience Principles

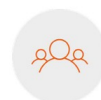
Help our **organizations** work better/smarter | Help our **teams** work better/smarter | Help our **individuals** work better/smarter



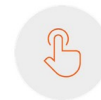
Connected &  
Intuitive Services



Only What  
Matters



User Context  
Driven



Enable  
employees where  
they "Hang Out"



Personal  
Choice



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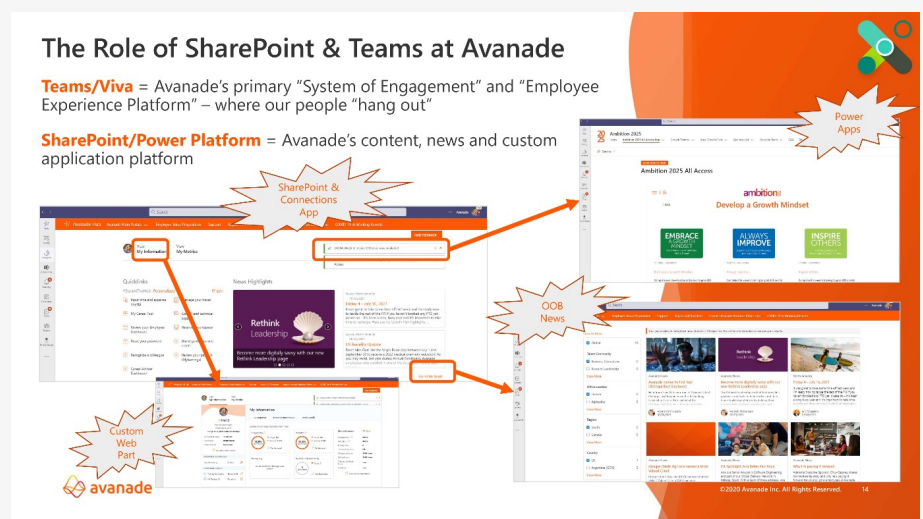
Figure 5: Avanade's principles for the workplace IT experience.

At Avanade, this vision of digital employee experience is delivered principally through Microsoft Teams. With the majority of staff spending most of their day in there, Teams is regarded as the main place that employees interact and consume information, and is now essentially the front door to the wider digital workplace.

As the apps within Microsoft Viva are consumed through Teams, its use aligns with Avanade's existing delivery model for digital services and experiences. Along with Viva, Avanade has sought to bring various apps into Teams to drive different integrations with other applications, both through out-of-the-box connectors but also through custom apps built in-house.

### Using Viva Connections

The Avanade team are using Viva Connections to allow users to view personalized communications and content principally from SharePoint within the Teams environment. SharePoint is used to deliver news and communications through a combination of out-of-the-box news web parts, custom-built Power Apps and a custom web part that creates a personalized, HR-related dashboard.



**Figure 6:** The role of SharePoint and Teams at Avanade.

Digital communications are also available from a variety of different sources to ensure better reach and to give choice to users over how they consume their content. Besides being available inside Teams through Viva Connections, there is also news via email and email newsletters, and content available via an intranet-like experience and through the SharePoint mobile app.

Avanade is also deploying other Viva modules, including Viva Topics, to use AI to support knowledge sharing.

## 6

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## 7

# Acknowledgements.



## About the author

**Steve Bynghall** is Research & Knowledge Lead at DWG, where he works as a research associate, author, benchmarker and consultant.

Steve is also an independent digital workplace consultant and writer, working with a number of other organizations, including Step Two and CMSWire. He recently co-founded Spark Trajectory, a training and consulting company helping intranet and digital workplace teams. Steve is based in London, UK.

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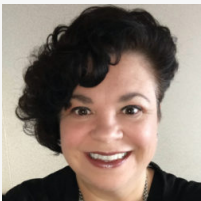
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### Why do so many leading companies choose Digital Workplace Group?

**Large company expertise:** We've worked with Fortune 1000 / FT 500 (and comparable) organizations for more than 18 years. Our expertise and insights focus on the successes, challenges and needs of such major organizations.

**Measurement and research focus:** Our consulting and evaluations rely on measurement derived from more than 700 benchmarks and our robust research programme, to provide a unique reservoir of statistics and case studies.

We provide 'data and metrics in a world of opinion'.

**Real-world practitioners:** Our benchmarkers and consultants have previously managed intranets and digital workplaces at major organizations. Our expertise is rooted in experience.

**Independence:** All our work is vendor neutral and our consulting and evaluation framework is proudly technology agnostic.



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