Microsoft 365

Diversity and Inclusion Playbook

Creating a more inclusive organization informed by behavioral data

September 2021

Intended audience

Primary users

Workplace Analytics users are project lead and analysts who plan to explore the business value and kick off one or more Diversity and Inclusion (D&I) analysis projects.

Note: *Playbook content is designed for users with a basic level of understanding of how to use Workplace Analytics.*

Workplace Analytics service delivery partners who plan to deliver Diversity and Inclusion service engagements.

Note: *Partners are expected to be badged before accessing and utilizing the playbook content.*

Diversity and Inclusion practitioners or other users that hope to acquire an understanding of how Workplace Analytics can be utilized in this topic area.

Notes

- The playbook aims to showcase the art of the possible for fostering an inclusive culture. You'll find the latest thinking and analysis with Workplace Analytics data combined with this playbook.
- This playbook is not intended as a technical how-to guide. To learn how to use Workplace Analytics, see the Workplace Analytics Learning modules.

User guide

Introduction section provides users with a high-level understanding of the business value of building an inclusive culture and how Workplace Analytics can be utilized to inform and improve it.

Inclusive organization framework section provides users with the guiding themes and business hypotheses for building an inclusive culture, along with sample analyses.

Project guidelines section provides users with the key principles and considerations in launching and managing projects. A three-tier process of project scoping, data analysis, and value creation is introduced in this section.

Drive to action section provides users with the general guidance and resources to drive a successful inclusivity initiative.

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Introduction

Diversity's dividend

Gender-diverse companies	Ethnically diverse companies
21%	33%
More likely to outperform	More likely to outperform

> Finding new and better solutions – innovating – requires thinking differently. That's why diversity powers innovation.

Dr. Scott Page
Professor of Complex Systems
University of Michigan

> We need to not just value differences, but also actively seek them out, invite them in, and, as a result, our ideas will be better, our products will be better, and our customers will be better served.

Satya Nadella
in *Hit Refresh*

* Delivering through Diversity, 2018 McKinsey report

Diversity without inclusion is not enough

Harvard Business Review

DIVERSITY

Diversity Doesn't Stick Without Inclusion

by Laura Sherbin and Ripa Rashid

FEBRUARY 01, 2017

Companies with inclusive cultures

Achieve stronger business outcomes

- 2x more likely to exceed financial targets
- 3x as likely to be high-performing
- 6x more likely to be agile and innovative[1]

Experience lower turnover

- 39% of US full-time employees would leave their current organization for a more inclusive one
- 23% of US full-time employees indicated they had already left[2]

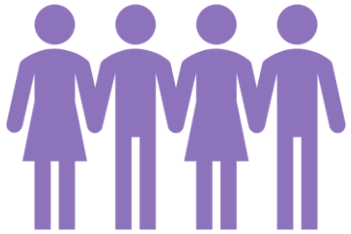
Have happier and healthier employees

- 4x more likely to rate themselves as favorably engaged
- 2.5x more likely to rate their wellbeing favorably[3]

1 The Diversity and Inclusion Revolution: Eight Powerful Truths, Deloitte Review, January 2018
2 Unleashing the power of inclusion, Deloitte University, 2017
3 2021 Employee Experience Trends, Qualtrics

Easier to measure diversity and tougher to measure inclusion

DIVERSITY
Who



Who is being recruited?

Who is being promoted?

Who is choosing to leave?

Diversity can be measured with ethnographic data and employment history

INCLUSION
How

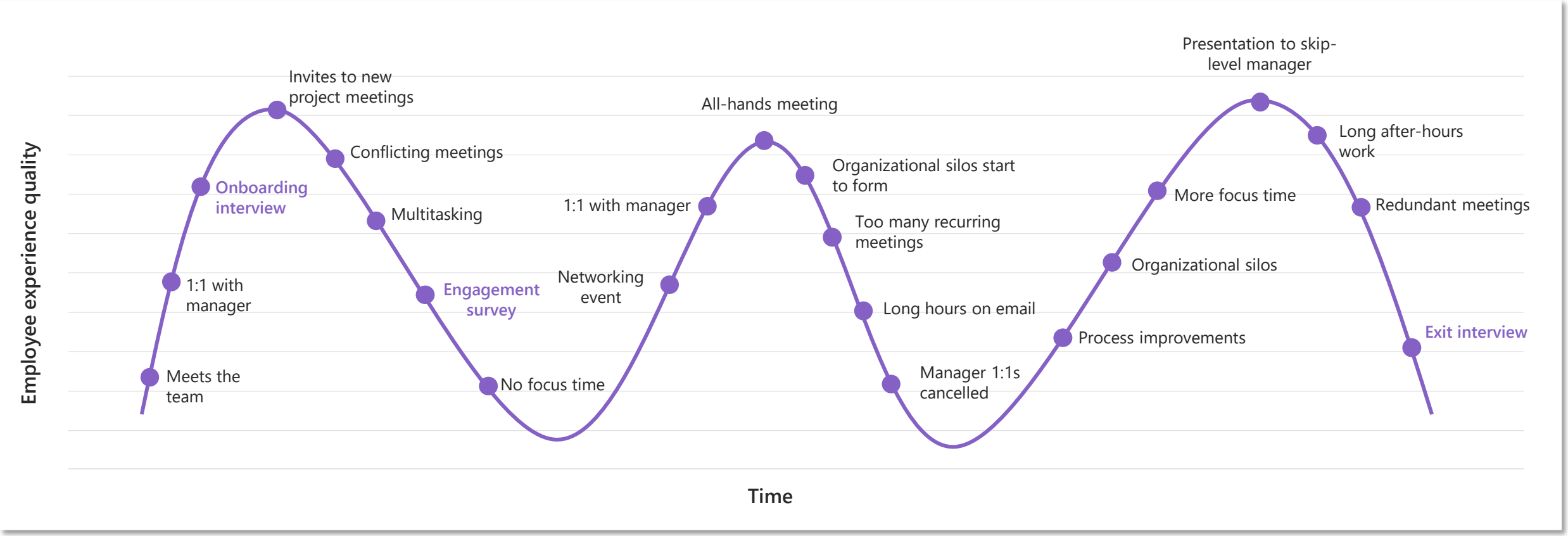
Is leadership role modeling an inclusive behavior?

Are team practices inclusive?

Are our processes unbiased and inclusive?

Inclusive behaviors can be measured with **Workplace Analytics** and attitudinal surveys

Workplace Analytics is uniquely positioned to measure and improve the inclusive workplace



Passively gathered, objective, end-to-end employee lifecycle data provides the opportunity to measure and improve inclusive workplace behaviors and practices

How does Workplace Analytics work?

Native Microsoft 365 data

Start with aggregated behavioral data from everyday work in collaboration tools

+

Control and governance

Flexible privacy and compliance controls help you protect your data

+

Business context

Overlay of organizational descriptors and business outcomes reveals patterns of success

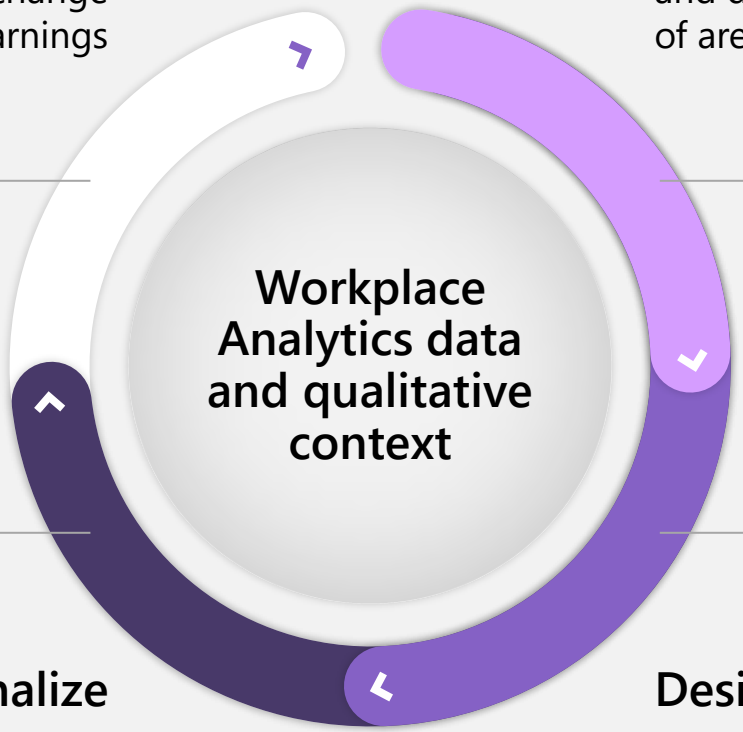
=

Insights and change

Use powerful insights to make better business decisions and transform your organization

Driving change with Workplace Analytics

A continuous and experimental data-driven process that cultivates a culture of change and leads to success



Generate insights

Quantify the impact of employee actions on business outcomes and develop recommendations of areas to improve

Design interventions

Bridge gap between recommendations and change by developing interventions that enable workers to adopt new behaviors

Operationalize

Pilot interventions and utilize dashboards to monitor change while maintaining a pulse on the behaviors of the overall organization

Transform workplace

Scale successful interventions, observe the spread of behaviors, and adapt change programs based on learnings

CASE STUDY

Identifying opportunities to fix the broken rung in career development for under-represented groups

Core Business Challenge

- A U.S. Financial Services company wants to fix the broken rung for females and under-represented ethnicities as they progress from associate to director levels in the company.
- Are existing initiatives, such as for leadership mentoring, and employee resource groups (ERGs) having a positive impact?

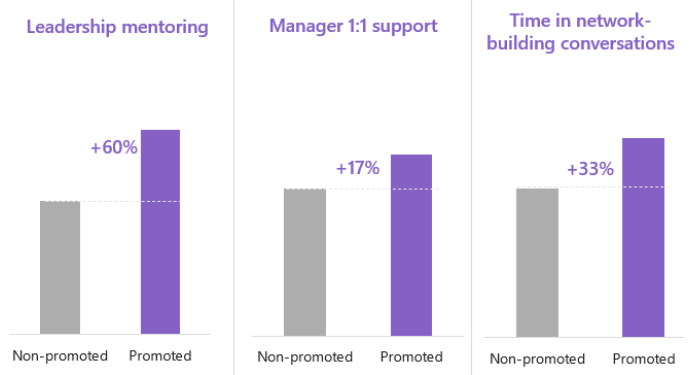
Workplace Analytics Solution

- Demonstrated positive impact of ERGs and mentoring programs on leadership exposure, network connectivity, promotions.
- Defined organizational behavioral goals for improving likelihood for promotion.
- Identified opportunities for improvement: addressing "the only" in meetings and leadership network disparities.

Action & Impact

- Using positive findings around impact of existing initiatives for internal promotional campaigns.
- Improving leadership network diversity by committing 3 hours each week to under-represented employees.
- Holding leaders accountable for inclusive behaviors with a new dashboard.

Employees with increased leadership, manager and peer support are more likely to be promoted



Key Finding

Regardless of ethnicity or gender, employees with increased leadership, manager, and peer support are more likely to be promoted. Existing leadership mentoring programs and ERGs are helping the company fix the broken rung.

"Workplace Analytics has reaffirmed that many of our D&I efforts are the right approach in making our company more equitable and inclusive and is also enabling us to refine next year's strategy to address additional insights that Workplace Analytics helped us uncover."

– Managing Director and Head of Diverse Talent Management & Advancement

Data illustrative of findings, modified to protect privacy

CASE STUDY

Creating a more inclusive environment in Microsoft's new hybrid workplace

Core business challenge

Microsoft's Denmark office is using the office soft-opening to re-imagine the workplace experience, as part of its workforce returns to the office while others continue to work from home.

Workplace Analytics solution

- Used Workplace Analytics to generate profiles about the diverse impact of remote work on employees, in order to move beyond a one-size-fits-all mentality.
- Generated reporting on key behavioral metrics, such as peer-to-peer connectivity, manager 1:1s, and network size, to ensure all employees are feeling included.

Action and impact

- Adoption of new inclusivity best practices, such as using Teams' video even when in the office, creating Teams channels devoted to community building, and daily morning leadership office hours.
- Increased awareness and KPI-based accountability for intentional inclusivity.

7 profiles of the diverse impact of remote work

Key finding

Increased manager support through regular 1:1s are helping employees with a diverse set of remote work issues stay connected, included, and heard. Manager 1:1s particularly aided the "risk of overload" employees with work prioritization assistance and faster issue resolution.

"It's fantastic to have data on organizational productivity and health during this shift to a new and fast-evolving hybrid model, requiring an added layer of conscientiousness to achieve the same experience for all."

– Nana Bule, Microsoft Denmark General Manager

Data illustrative of findings, modified to protect privacy

CASE STUDY

Uncovering leadership network biases using Workplace Analytics

Core business challenge

- Large multi-industrial company in EMEA wanted to address a gender gap by improving the network connectivity of female employees

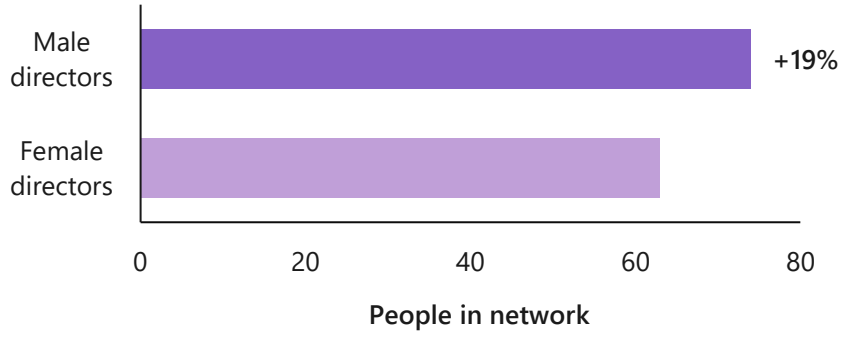
Workplace Analytics solution

- Using Workplace Analytics, the company found that male directors were statistically more likely to invest time with male colleagues one level below than with female colleagues one level below
- Male directors' internal networks were **19%** larger than those of female directors

Action and impact

- Based on the findings, the company developed plans to foster internal networking among female employees, connecting female directors and senior leaders with women at different levels across the organization

Internal network size by gender



Key finding

Workplace Analytics data showed male directors were more likely to spend time with male colleagues than female colleagues one level below, and that female employees at the company had smaller average internal network sizes

Data illustrative of findings, modified to protect privacy

CASE STUDY

Disrupting bias in the employee talent management lifecycle by identifying behaviors most linked to employee success

Core business challenge

US Fortune 500 financial company wants to de-bias the talent and performance management process across the employee lifecycle.

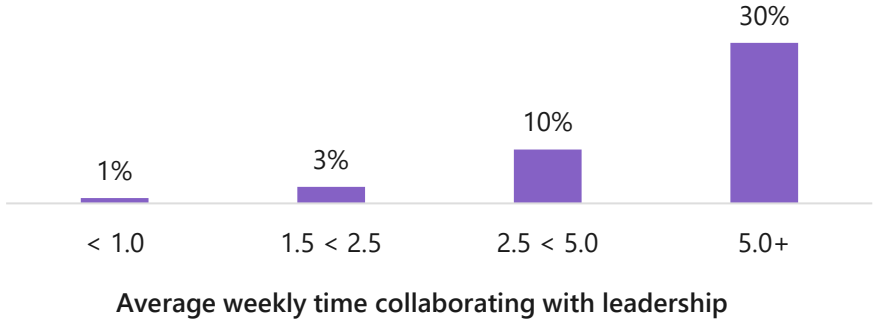
Workplace Analytics solution

- Assessed likelihood of promotion and pay raise using Workplace Analytics metrics reflecting leadership access, relationship building, career development opportunities, and ways of working.
- Leadership access, leadership mentoring, and large internal networks were the consistent factors contributing to success across employee levels.

Action and impact

Based on the findings, the company is re-evaluating its career development tracks, investing in career development training for its people managers and revisiting each stage of the HR employee life cycle process to reduce bias.

Promotion rate as a function of weekly leadership exposure



Key finding

Workplace Analytics data provided quantitative evidence that who you know is as important as what you do. Employees who spend 5+ hours per week collaborating with leadership are **30x more likely to get promoted** than those who spend less than one hour per week with leadership.

"The Workplace Analytics findings influenced how we think about bias disruption throughout the employee lifecycle and broad HR processes."

– HR Director

Data illustrative of findings, modified to protect privacy

Inclusive organization framework

Model of the inclusive organization

Committed leadership

Ensure leadership is role-modeling inclusive behaviors and educating the next generation of leaders

Inclusive practices

Cultivate and foster an inclusive and collaborative environment where employees can thrive

Inclusive and unbiased processes

Ensure equitable paths to success for all employees

Employee impact

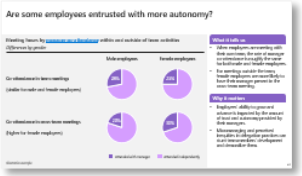
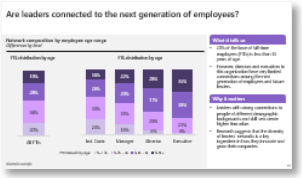
- Sense of belonging
- Employee engagement
- Wellbeing
- Job performance
- Intent to stay

Business outcomes

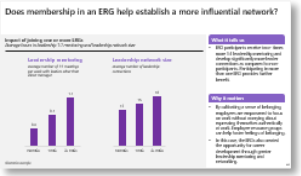
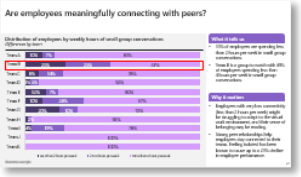
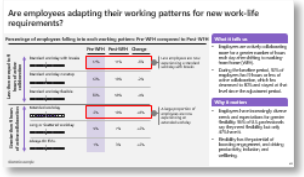
- Diverse leadership pipeline
- Reduced attrition
- Higher product quality
- Greater innovation and agility

Source: Inclusion and Diversity in Work Groups, Shore, et al. Journal of Management, 2011

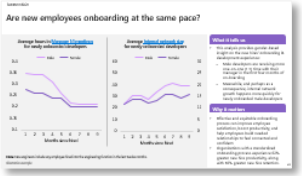
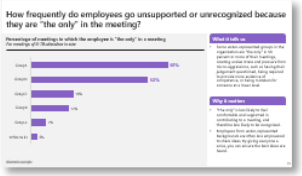
Committed leadership

Topic	Sample analysis (click slide to expand)	Guiding business questions	Why does it matter?	Research
Coaching and Empowerment		Are leaders providing equal empowerment and coaching to under-represented groups? Are leaders mentoring employees in under-represented groups?	Employees' ability to grow and advance is impacted by the amount of support, trust and autonomy provided by their managers. Empowering employees cultivates an organizational culture of trust, which creates more efficient processes, boosts employee morale, and fosters initiative.	Paradigm: Inclusive Leadership: Unlocking the power of diversity through inclusion HBR: Leaders, Stop Denying the Gender Inequity in Your Organization HBR: Signs that You are a Micromanager
Fair task assignment		Are leaders assigning tasks in a fair and equitable manner?	Studies show that women and other underrepresented groups do more "office housework" and have less access to high visibility work than white men do. Office housework, like taking meeting notes or organizing team activities, often goes unnoticed while high visibility work gives greater opportunity for promotions and career development.	HBR: For Women and Minorities to Get Ahead, Managers Must Assign Work Fairly
Networking		Are leaders maintaining diverse networks? Are female and male leaders maintaining the same proportion of females in their network?	Leaders with strong connections to people of different demographic backgrounds and skill sets create higher firm value. This greater firm value comes from better corporate innovations and successful diversified initiatives. Research suggests that the diversity of leaders' networks is a key ingredient in how they grow their companies.	HBR:Research: CEOs with Diverse Networks Create Higher Firm Value

Inclusive practices

Topic	Sample analysis (click slide to expand)	Guiding business questions	Why does it matter?	Research
Belonging: Employee resource groups		Does membership in an Employee Resource Group help establish a more influential network?	Employees with higher workplace belonging demonstrate better job performance, an increase in their employer promoter score and a drop in turnover risk. By cultivating a sense of belonging, employees are empowered to focus on work without worrying about expressing themselves authentically at work. Employee resource groups can help foster feelings of belonging.	HBR: The Value of Belonging at Work HBR: Be a Better Ally
Belonging: Peer-to-peer connectivity		Are all employees connecting meaningfully with their teams?	Strong peer relationships help employees stay connected to their teams. Feeling isolated has been shown to cause up to a 21% decline in employee performance. Help employees maintain strong employee connections through recreational meetings and instant messages, in addition to regular work meetings.	Virtual First Toolkit: How to Support Your Team (drop box) HBR: When Female Networks Aren't Enough HBR: Men and Women Need Different Kinds of Networks to Succeed HBR: Restructure Your Organization to Actually Advance Racial Justice
Uniqueness: Flexibility and support		Are all employees able to adapt their working patterns to deal with new work life requirements?	Employee diverse needs and expectations in the workplace create a demand for higher flexibility. For example, 96% of U.S. professionals say they need flexibility, but only 47% have it. Flexibility has been reported as a key benefit of working from home across surveys in different geographies, but companies should be aware of the potential blurring of work-life boundaries, requiring managers to keep tabs on employees' wellbeing.	HBR: Increase Workplace Flexibility and Boost Performance HBR: Off-Ramps and On-Ramps: Keeping Talented Women on the Road to Success HBR: Don't Let the Pandemic Set Back Gender Equality HBR: 3 Ways to Advance Gender Equity as We Return to the Office HBR: Your Company Needs a Better Retention Plan for Working Parent HBR: Adapt Your Diversity and Inclusion Efforts to the Reality of the Crisis

Inclusive and unbiased processes

Topic	Sample analysis (click slide to expand)	Guiding business questions	Why does it matter?	Research
Onboarding		Are new employees onboarding at the same pace?	Effective onboarding processes improve employee satisfaction, boost productivity, and help employees build relationships that enable work and grow engagement. Organizations with a standardized onboarding process experience 62% greater new hire productivity, along with 50% greater new hire retention.	HBR: To Retain New Hires, Make Sure You Meet with Them in Their First Week HBR: Every New Employee Needs an Onboarding Buddy HBR: To Retain New Hires, Spend More Time Onboarding Them Deloitte Insights DEI Tech: Tools for Equity
Career development		What employee behaviors lead to promotion?	Designing structured and transparent people processes ensures that outcomes are fair and that employees perceive them as such. When a promotion process isn't transparent, for example, employees from underrepresented backgrounds may be concerned they will be overlooked for a promotion because they don't "fit the mold" of a typical leader.	WSJ: Research suggests women are assessed differently, affecting their advancement HBR: Why Men Still Get More Promotions Than Women HBR: When Female Networks Aren't Enough
Inclusive meetings		Are employees provided the required support to make them meeting contributors? How frequently is an employee "the only" in a meeting?	Meetings continue to be the prime venue to build and foster an inclusive culture. When employees feel like they have a voice and say in decision making, they are most satisfied and committed to their jobs. Remote, junior, and introverted employees frequently feel less empowered to share ideas. By giving everyone a voice, you can ensure the best ideas are on the table.	HBR: To Build an Inclusive Culture Start with Inclusive Meetings HBR: Women Directors Change How Boards Work HBR: To Understand Whether Your Company Is Inclusive, Map How Your Employees Interact

Project guidelines

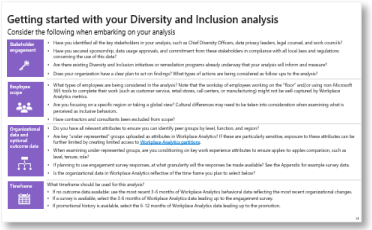
Create value by delivering a data-backed use case initiative

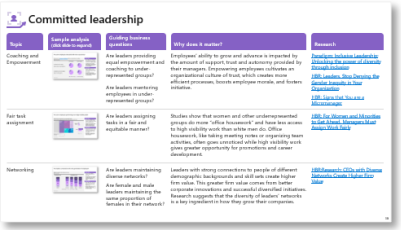
Three-tier process to identify value-adding opportunities, deliver high-quality analysis, and drive decision-making

Project scoping

The most impactful initiatives address core business issues

- *Understand business priorities*
- *Define hypotheses or guiding questions*
- *Identify and validate sources*

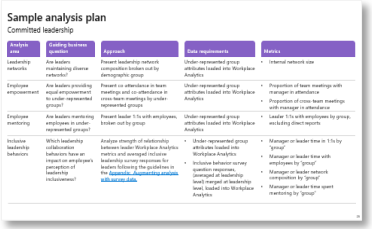




Data analysis

Analysis should be proportional and adequate to each business need

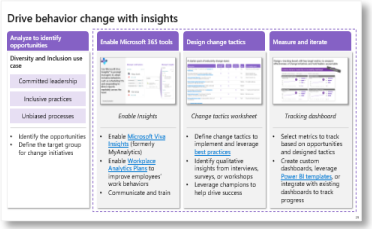
- *Analysis planning*
- *Analyse metrics and models*
- *Connecting the dots and estimating ROI*



Value creation

A project is only successful if it delivers quantifiable business value

- *Communicating results*
- *Identify and agree on next steps and actions*
- *Act, track, and disseminate*



Click slides to expand

Due to sensitive nature of data and potential findings, consider these items when embarking on a D&I project

Item	Description
Business sponsorship, laws and regulations	Have you secured sponsorship, data usage approvals, and commitment from these stakeholders in compliance with all local laws and regulations concerning the use of this data?
Plan to act on findings	Does your organization have a clear plan to act on findings? What types of actions are being considered as follow-ups to the analysis? The organization is subject to legal risk if issues are identified, and no action is taken.
Sensitive organizational data and attributes	Are key "under-represented" groups uploaded as attributes in Workplace Analytics? If these are particularly sensitive, exposure to these attributes can be further limited by creating a special limited access to a partition (instructions).
Ensure apples-to-apples comparisons	When examining under-represented groups, are you conditioning them on key work experience attributes to ensure an apples-to-apples comparison, such as level, tenure, or role? Zoom in and out to avoid misleading conclusions at a high-level aggregated view.

Getting started with your Diversity and Inclusion analysis

Consider the following when embarking on your analysis

Stakeholder engagement

- Have you identified all the key stakeholders in your analysis, such as Chief Diversity Officers, data privacy leaders, legal counsel, and work councils?
- Have you secured sponsorship, data usage approvals, and commitment from these stakeholders in compliance with all local laws and regulations concerning the use of this data?
- Are there existing Diversity and Inclusion initiatives or remediation programs already underway that your analysis will inform and measure?
- Does your organization have a clear plan to act on findings? What types of actions are being considered as follow-ups to the analysis?

Employee scope

- What types of employees are being considered in the analysis? Note that the workday of employees working on the "floor" and/or using non-Microsoft 365 tools to complete their work (such as customer service, retail stores, call centers, or manufacturing) might not be well-captured by Workplace Analytics metrics.
- Are you focusing on a specific region or taking a global view? Cultural differences may need to be taken into consideration when examining what is perceived as inclusive behaviors.
- Have contractors and consultants been excluded from scope?

Organizational data and optional outcome data

- Do you have all relevant attributes to ensure you can identify peer groups by level, function, and region?
- Are key “under-represented” groups uploaded as attributes in Workplace Analytics? If these are particularly sensitive, exposure to these attributes can be further limited by creating limited access to Workplace Analytics partitions.
- When examining under-represented groups, are you conditioning on key work experience attributes to ensure apples-to-apples comparison, such as level, tenure, role?
- If planning to use engagement survey responses, at what granularity will the responses be made available? See the Appendix for example survey data.
- Is the organizational data in Workplace Analytics reflective of the time frame you plan to select below?

Timeframe

What timeframe should be used for this analysis?

- If no outcome data available: use the most recent 3-6 months of Workplace Analytics behavioral data reflecting the most recent organizational changes.
- If a survey is available, select the 3-6 months of Workplace Analytics data leading up to the engagement survey.
- If promotional history is available, select the 6-12 months of Workplace Analytics data leading up to the promotion.

Consider the following data fields to support your analysis

Fields to consider but are not limited to:

Candidate diversity attribute | Other organizational (HR) attribute | Non-HR organizational attribute | Outcome attribute

Attribute	Example	Application for inclusivity
Work style	Office, remote, hybrid	• Evaluate organizational inclusivity by work style
Region	Asia, Europe, North America, and so on	• Evaluate organizational inclusivity by region
Worker type	Full time, part time, or contractor	• Evaluate organizational inclusivity by type of worker
Gender	Organizationally-approved gender values	• Evaluate organizational inclusivity by gender
Ethnicity	Organizationally-approved ethnicity values	• Evaluate organizational inclusivity by ethnicity
Age and generation	Organizationally-approved age brackets	• Evaluate organizational inclusivity by age range or generation
Supervisor indicator	Individual contributor, manager, manager+, and so on	• Mechanism to identify leadership
Months since hire	0 to 999	• Track onboarding progress over time
ERG membership	Name of ERG group	• Evaluate impact of ERG membership
ERG membership date	MM/DD/YYYY	• Track impact of ERG membership over time
Inclusivity survey question response	Response of 1-5 for the statement of "I am treated as a valued member of my team"	• Correlate employee perception to employee, team, and leader behaviors • Ideally uploaded at the employee level
Performance rating	Exceeds expectations or meets expectations	• Correlate employee success to employee, team, and leader behaviors
Promotion history	Promotion in the last 12 months	• Correlate employee success to employee, team, and leader behaviors

Sample analysis plan

Committed leadership

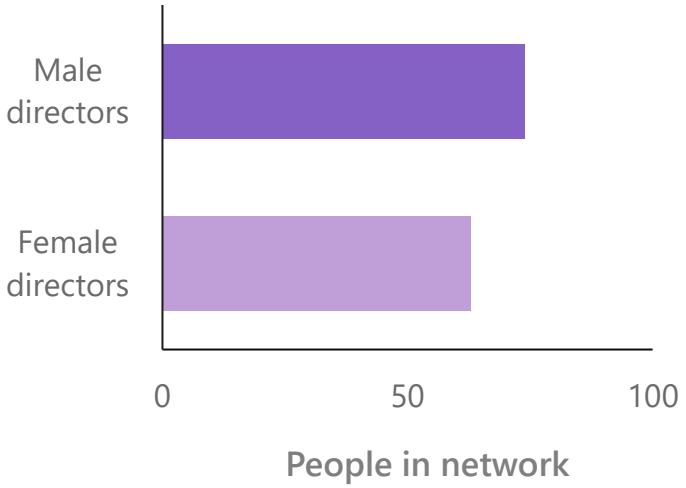
Analysis area	Guiding business question	Approach	Data requirements	Metrics
Leadership networks	Are leaders maintaining diverse networks?	Present leadership network composition broken out by demographic group	Under-represented group attributes loaded into Workplace Analytics	• Internal network size
Employee empowerment	Are leaders providing equal empowerment to under-represented groups?	Present co-attendance in team meetings and co-attendance in cross-team meetings by under-represented groups	Under-represented group attributes loaded into Workplace Analytics	• Proportion of team meetings with manager in attendance • Proportion of cross-team meetings with manager in attendance
Employee mentoring	Are leaders mentoring employees in under-represented groups?	Present leader 1:1s with employees, broken out by group	Under-represented group attributes loaded into Workplace Analytics	• Leader 1:1s with employees by group, excluding direct reports
Inclusive leadership behaviors	Which leadership collaboration behaviors have an impact on employee's perception of leadership inclusiveness?	Analyze strength of relationship between leader Workplace Analytics metrics and averaged inclusive leadership survey responses for leaders following the guidelines in the Appendix: Augmenting analysis with survey data.	• Under-represented group attributes loaded into Workplace Analytics • Inclusive behavior survey question responses, (averaged at leadership level) merged at leadership level, loaded into Workplace Analytics	• Manager or leader time in 1:1s by "group" • Manager or leader time with employees by "group" • Manager or leader network composition by "group" • Manager or leader time spent mentoring by "group"

Sample Diversity and Inclusion findings

Address network imbalance

Connect female leaders to narrow gender gap within organization

Internal network size by gender

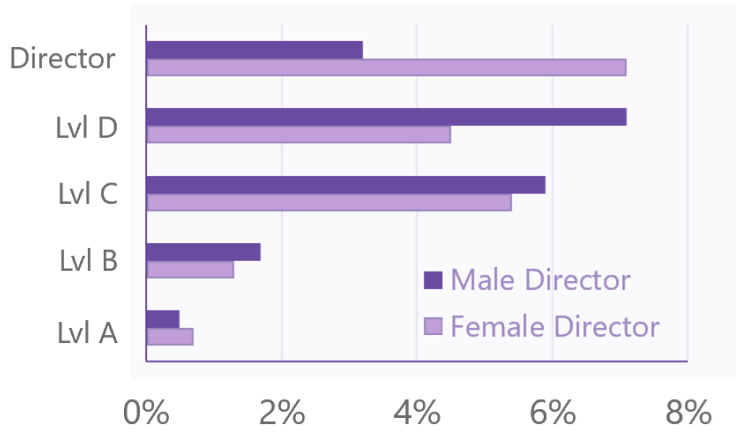


Male directors benefit from internal networks that are **19%** larger than those of Female directors. This could impact performance and career prospects.

Promote workplace diversity

Leverage female directors as role-model of inclusivity

Time invested in male colleagues

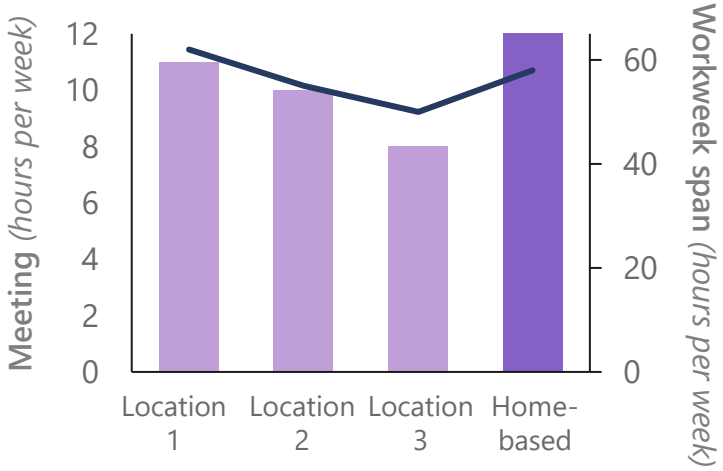


Male directors **over invest** in male colleagues one level below them, potentially hampering inclusivity within their leadership teams.

Enable remote working

Build on experience from Organization 5 to promote productive flexibility elsewhere

Productivity of remote workers (Organization 5)



Home-based sales employees spend the **most time in meetings** and have workweek spans that are similar in length to office-based employees.

Identify metrics that define your intended cultural traits and use them to measure and drive cultural transformation

Drive to action

Drive behavior change with insights

Analyze to identify opportunities

Diversity and Inclusion use case

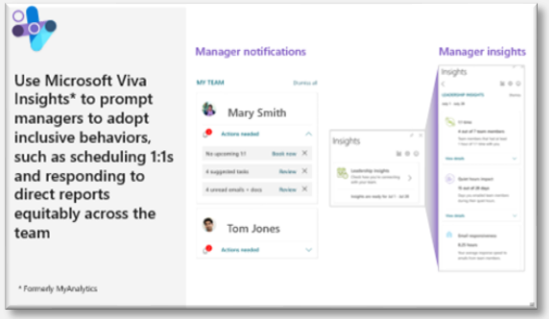
Committed leadership

Inclusive practices

Unbiased processes

- Identify the opportunities
- Define the target group for change initiatives

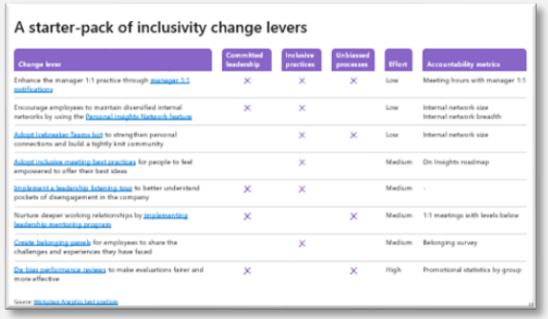
Enable Microsoft 365 tools



Enable Insights

- Enable Microsoft Viva Insights (formerly MyAnalytics)
- Enable Workplace Analytics Plans to improve employees' work behaviors
- Communicate and train

Design change tactics



Change tactics worksheet

- Define change tactics to implement and leverage best practices
- Identify qualitative insights from interviews, surveys, or workshops
- Leverage champions to help drive success

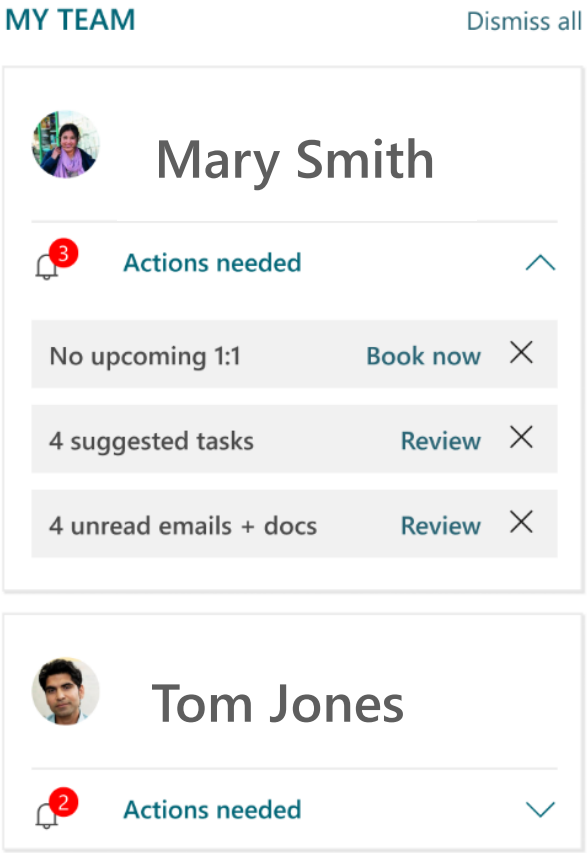
Measure and iterate

Tracking dashboard

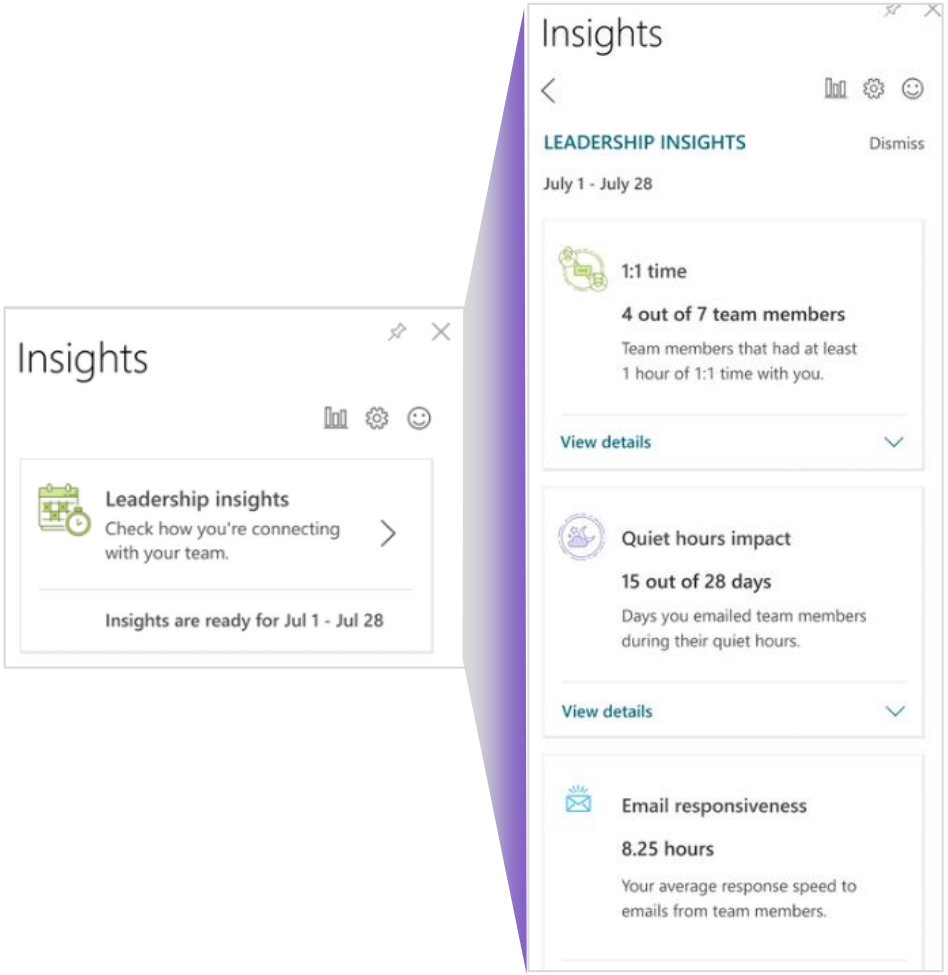
- Select metrics to track based on opportunities and designed tactics
- Create custom dashboards, leverage Power BI templates, or integrate with existing dashboards to track progress

Use Microsoft Viva Insights* to prompt managers to adopt inclusive behaviors, such as scheduling 1:1s and responding to direct reports equitably across the team

Manager notifications



Manager insights



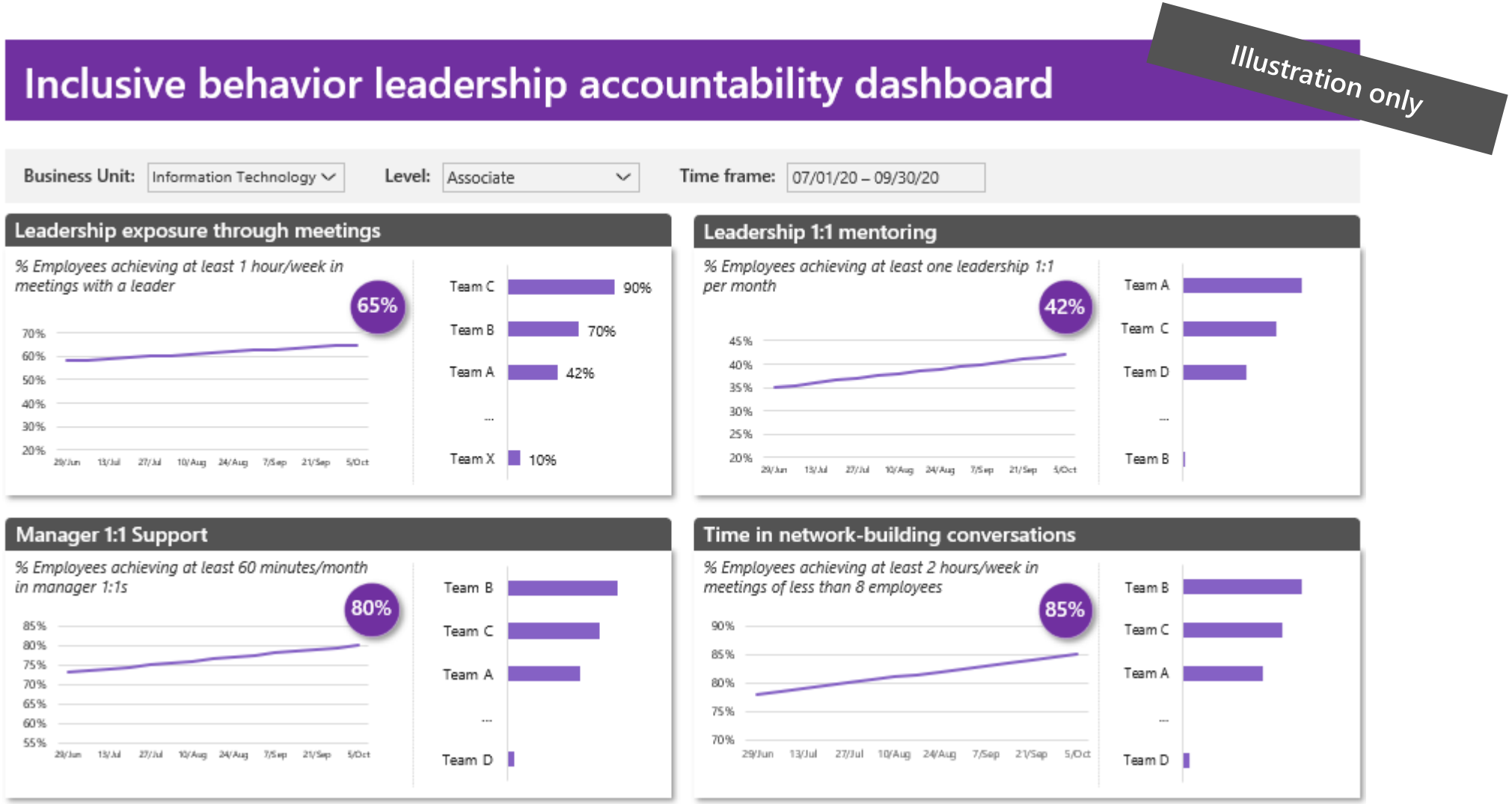
* Formerly MyAnalytics

A starter-pack of inclusivity change levers

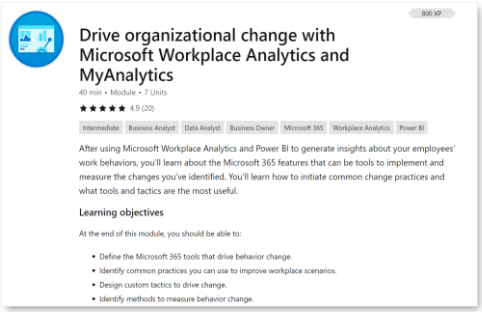
Change lever	Committed leadership	Inclusive practices	Unbiassed processes	Effort	Accountability metrics
Enhance the manager 1:1 practice through manager 1:1 notifications	✕	✕	✕	Low	Meeting hours with manager 1:1
Encourage employees to maintain diversified internal networks by using the Personal insights Network feature	✕	✕		Low	Internal network size Internal network breadth
Adopt Icebreaker Teams bot to strengthen personal connections and build a tightly knit community		✕	✕	Low	Internal network size
Adopt inclusive meeting best practices for people to feel empowered to offer their best ideas		✕		Medium	On Insights roadmap
Implement a leadership listening tour to better understand pockets of disengagement in the company	✕	✕		Medium	-
Nurture deeper working relationships by implementing leadership mentoring program	✕		✕	Medium	1:1 meetings with levels below
Create belonging panels for employees to share the challenges and experiences they have faced		✕		Medium	Belonging survey
De-bias performance reviews to make evaluations fairer and more effective	✕		✕	High	Promotional statistics by group

Source: Workplace Analytics best practices

Design a tracking board with key target metrics to measure effectiveness of change initiatives and hold leaders accountable



Resources for more detailed considerations in change initiation and management



Item	Description
[Drive Organizational Change with Microsoft Workplace Analytics and MyAnalytics]	An online self-paced Microsoft Learn module that aims to help users understand: • Microsoft 365 tools that can be used to drive change • Common change practices and tactics

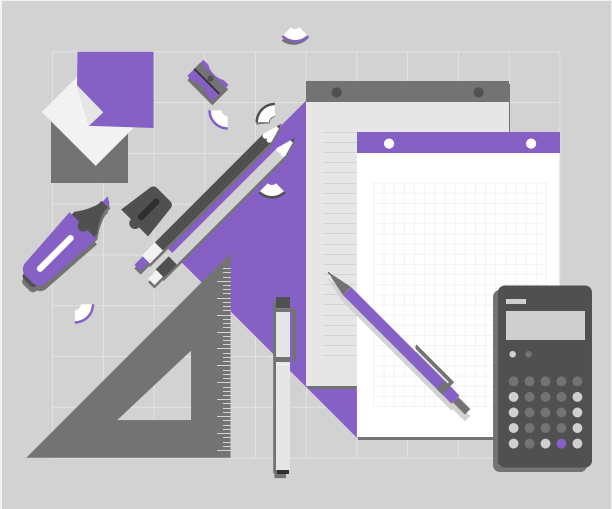
[Workplace Analytics best practices]	An online site that aims to provide readers with best practices and changes strategies by business topics

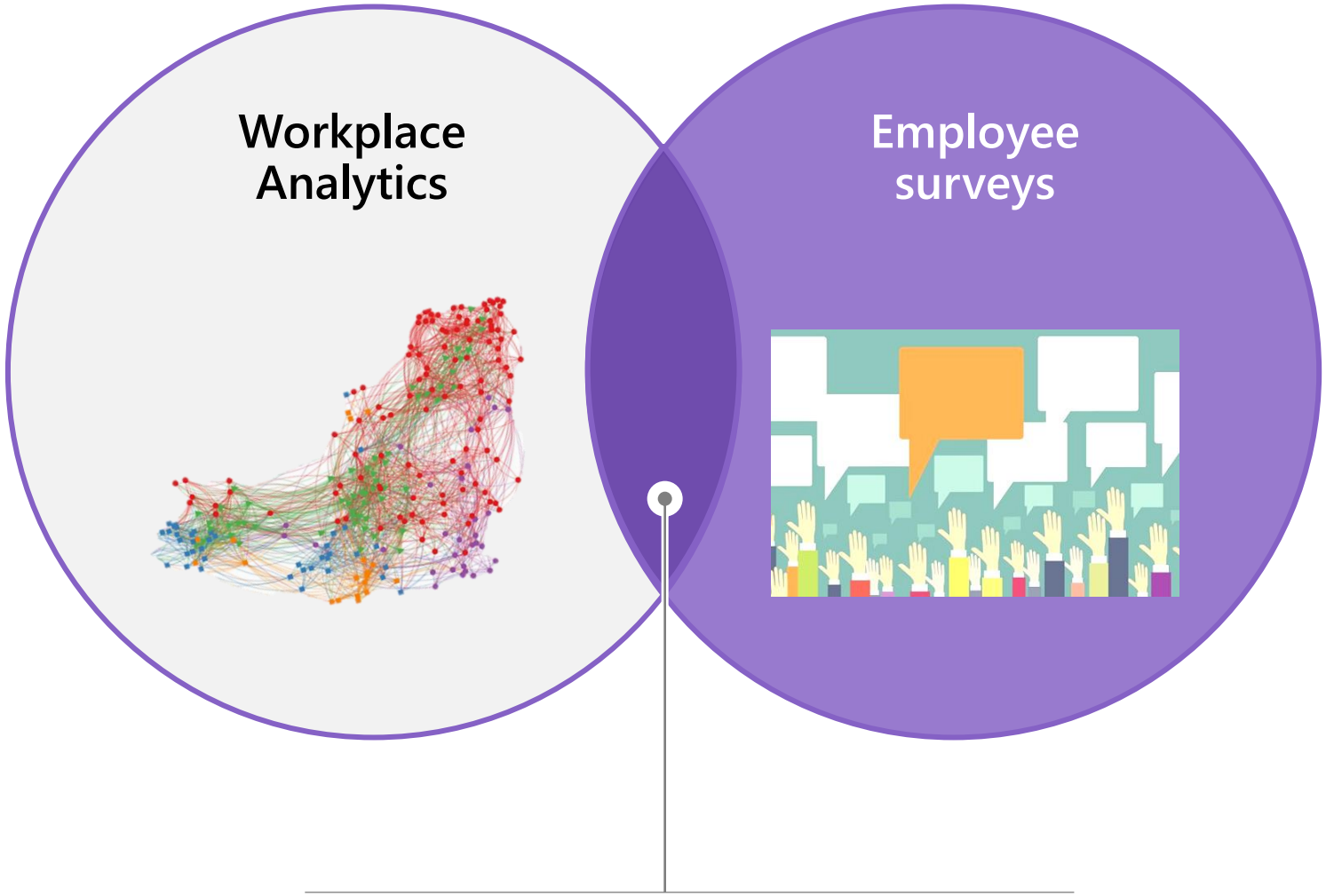
[Taking Insights to Action Playbook]	A playbook that lays out key considerations along change initiation and management: • Preparing for change • Enable with Microsoft 365 • Design custom tactics • Measure

Appendix:
Augmenting analysis with engagement survey data

Employee surveys can pinpoint *which* groups are doing poorly across engagement metrics, but it is difficult for them alone to extrapolate *why* this is the case

Workplace Analytics provides an objective and data-driven approach to understanding factors that may be impacting employee sentiment





Deeper insights to develop effective interventions and accelerate change

Engagement survey

How employees feel

Am I treated as a valued member of my team?
Do my opinions count?
Do I have opportunities to achieve my work goals?

Quarterly, subjective, and non-responder bias

Survey provides the **who** and **what**:

- Teams that needs help
- Areas of improvement

Workplace Analytics

What employees do

Decision meetings organized and attended
Collaboration time with team members
Manager 1:1s relative to peers

Weekly, objective, and unbiased

Workplace Analytics provide the **how**:

What behaviors does my team need to change to achieve improvement?

Workplace Analytics tracks **progress** of behavioral change:

Are desirable behaviors being achieved over time?

Merging survey data with Workplace Analytics data at the individual level provides the greatest analytic flexibility and insights

		Option A	Option B	Option C	Option D
Description		Individual survey results for each survey category	Individual survey results for overall survey score	Team/org level survey results for each survey category	Team/org level survey results for overall survey score
Value prop	PID-level responses	More factors to slice analysis by	More factors to slice analysis by	Less access to identifiable data (at time of upload) for Workplace Analytics admin	Less access to identifiable data (at time of upload) for Workplace Analytics admin
	Survey category responses	More nuance about specific engagement categories (such as career path and connectivity)	Simple, single engagement score to judge outcomes by	More nuance about specific engagement categories (such as career path and connectivity)	Simple, single engagement score to judge outcomes by
Risks		(Only) Workplace Analytics admin can see individual survey scores prior to upload ***or*** Outside vendor merges the data at the individual level outside of Workplace Analytics using a key	(Only) Workplace Analytics admin can see individual scores prior to upload ***or*** Outside vendor merges the data at the individual level outside of Workplace Analytics using a key	**Unknown how members of a team vary in their responses about inclusivity** **Can't pivot and aggregate analysis for individuals by any dimension other than team**	**Unknown how members of a team/org vary in their responses about inclusivity** **Can't pivot and aggregate analysis for individuals by any dimension other than team**
Recommendation		Best	Good	Limiting	Limiting

Recommend Option A or B

Engagement survey data is added to Workplace Analytics by an HR-based Workplace Analytics admin. Identifiable, individual scores are not visible to analysts in Workplace Analytics. Alternatively, the survey data can be provided to an outside vendor who will perform the merging of Workplace Analytics and survey data based on a mutually-approved match key.

Step 1: Brainstorm hypotheses for each survey question

Survey questions	Hypotheses	Workplace Analytics metrics
"I am treated as a valued member of my workgroup"	Employees feel part of a team when ...they are networked with their team ...they are influential in their network ...they are included in decision-making meetings ...they participate in peer-to-peer conversations ...they feel comfortable organizing meetings ...they are not the only one from their group at the meeting table	• Internal network size • Network influence • Meetings attended with less than 8 people • Time in team conversations • Number of meetings organized • Meetings where they are the only one from their group in attendance • Meetings in which 3+ of the same group are present
"I have opportunity to achieve my career goals"	Employees feel like career development opportunities are inclusive and equitable when ...they receive equivalent manager 1:1s relative to their peers ...they have equivalent leadership access relative to their peers ...they are receiving equivalent mentorship relative to their peers	• Manager 1:1s relative to peers • Time with leadership relative to peers • Mentorship relative to peers

Step 2: Identify behaviors significantly correlated to survey response

Workplace Analytics behavior metrics[1] leading up to employee **engagement** survey

Workplace behaviors

- Internal network size
- Time with leadership
- Network influence
- Time in team conversations
- Workweek span
- Time in training
- Manager 1:1s
- Manager network
- Organized meetings

...are merged with employee-level responses to each selected survey question

Positive[3]
Neutral (3)
Agree (4)
Strongly agree (5)

Negative
Strongly disagree (1)
Disagree (2)

...to find statistically significant[2] behavioral differentiators of positive and negative responses to each survey question

***Note**: frequently useful to split out view of individual contributors as compared to supervisors*

1 Timeframe = 3 to 6 months prior to employee engagement survey
2 Statistically significant at a p-value of 0.05 or less
3 What gets grouped into "positive" category might depend on distributions, such as "3s" might look more like 1s and 2s

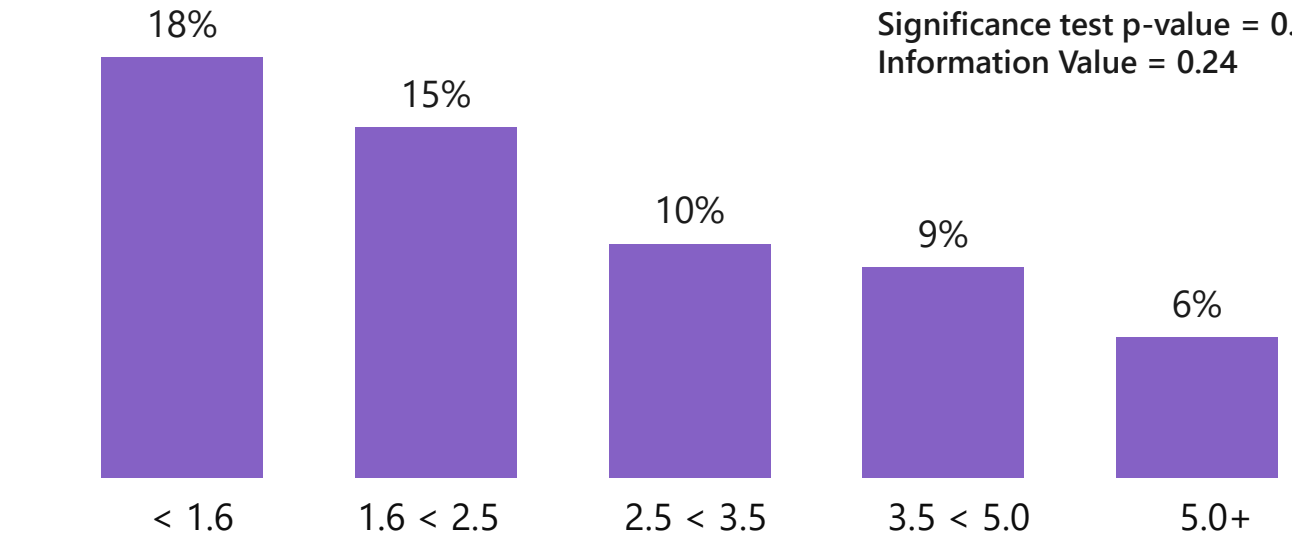
Step 3: Examine the significance of the relationship and if it passes the test

Employee segment: Individual contributor

Outcome: "I have opportunities to achieve my career goals"
Equals 1 if strongly disagree or disagree, otherwise equals 0 (zero)

Metric: Average weekly collaboration hours with above average levels

Significance test p-value = 0.00
Information Value = 0.24



Average weekly collaboration hours with levels above grouped by quintile
(20% in each range)

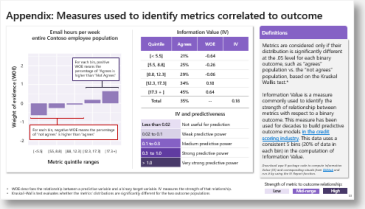
How to read

The 20% of individual contributors who collaborate an average 5+ hours each week with above average levels are 3X less likely to respond negatively to the question about achieving their career goal.

Statistical measures

- Significance test: Kruskall-Wallis test
- Predictive content measure: Information Value[1]

Click this slide for more detail



Download wpa R package code to compute Information Value (IV) and corresponding visuals on GitHub and run it by using the IV Report function.

1 A measure of the predictive content of a variable with respect to a binary outcome, used widely in credit scoring

Sample inclusivity survey responses, hypotheses, and metrics

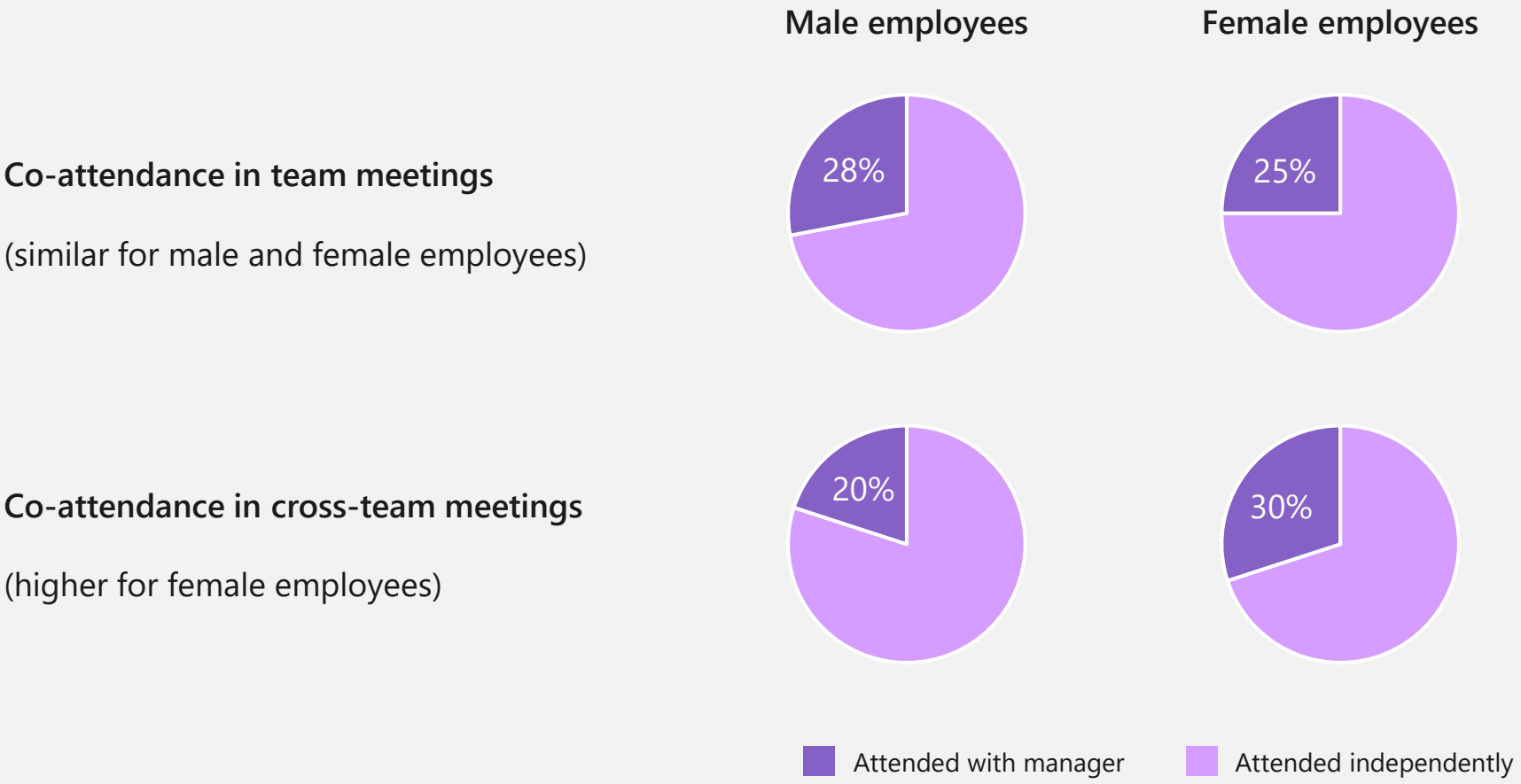
	Survey question responses	Hypotheses (to further expand through interviews and focus groups)	Workplace Analytics metrics
Committed leadership	Rolled up from direct reports to an average for each manager or leader: "Leaders' value different perspectives" "My manager or leader treats employees with respect and dignity"	Employees (or specifically under-represented employees) consider leaders or managers more inclusive when: ...they maintain diverse networks ...they provide equal access to under-represented groups ...they mentor employees in under-represented groups	• Manager or leader network composition by "group" • Manager or leader time with employees by "group" • Manager or leader time spent mentoring by "group" • Manager or leader time in 1:1s by group
Inclusive culture	At the employee level: "I am treated as a valued member of my work group" "My opinions seem to count"	Employees feel part of a team when: ...they are networked with their team ...they are influential in their network ...they are included in decision-making meetings ...they participate in peer-to-peer conversations ...they feel comfortable organizing meetings ...they are not the only one from their group at the meeting table	Relative to peers or well-represented group: • Internal network size • Network influence • Meetings attended with less than 8 people • Time in team conversations • Number of meetings organized • Meetings where they are the only one from their group in attendance • Meetings in which 3+ of the same group are present
Unbiased processes (career development or onboarding)	At the employee level: "I have opportunity to achieve my career goals" "My job performance is evaluated fairly"	Employees feel like career development opportunities are inclusive and equitable when: ...they receive equivalent manager 1:1s relative to their peers ...they have equivalent leadership access relative to their peers ...they are receiving equivalent mentorship relative to their peers ...they are rarely "the only" in meetings	Relative to peers or well-represented group: • Manager 1:1s relative to peers • Time with leadership relative to peers • Mentorship relative to peers • Percent of meetings where "the only" occurs

Appendix:
Sample analyses

Are some employees entrusted with more autonomy?

Meeting hours by manager co-attendance within and outside of team activities

Differences by gender



Illustrative example

What it tells us

- When employees are meeting with their own team, the rate of manager co-attendance is roughly the same for both male and female employees.
- For meetings outside the team, female employees are more likely to have their manager present in the cross-team meeting.

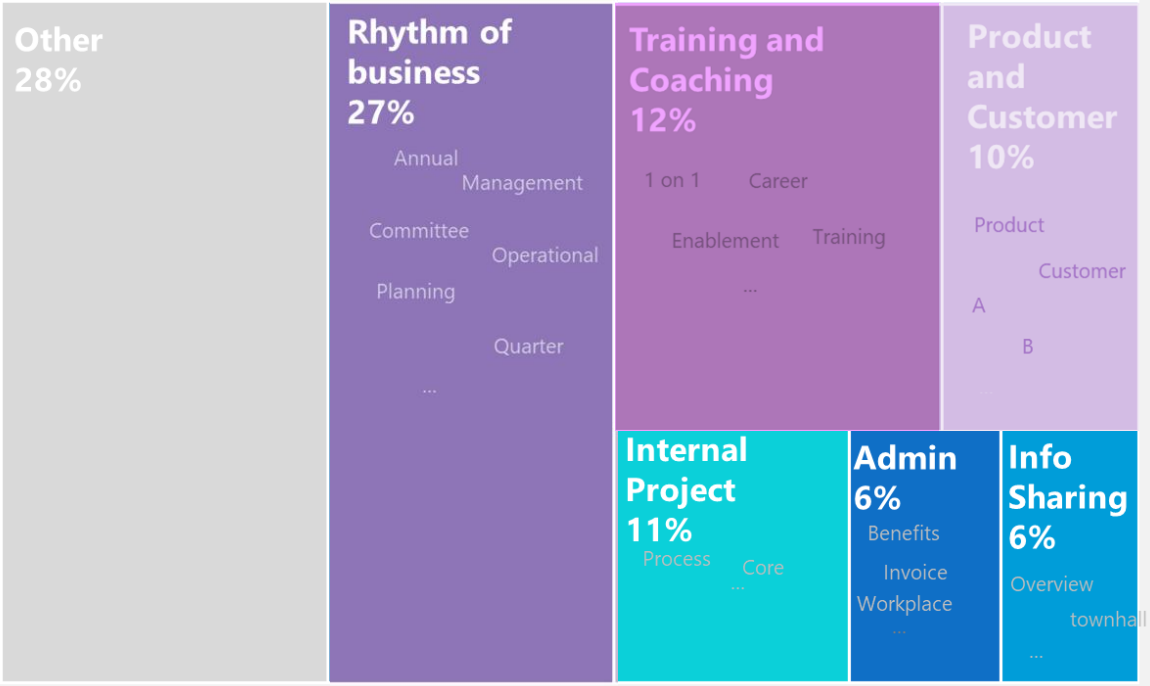
Why it matters

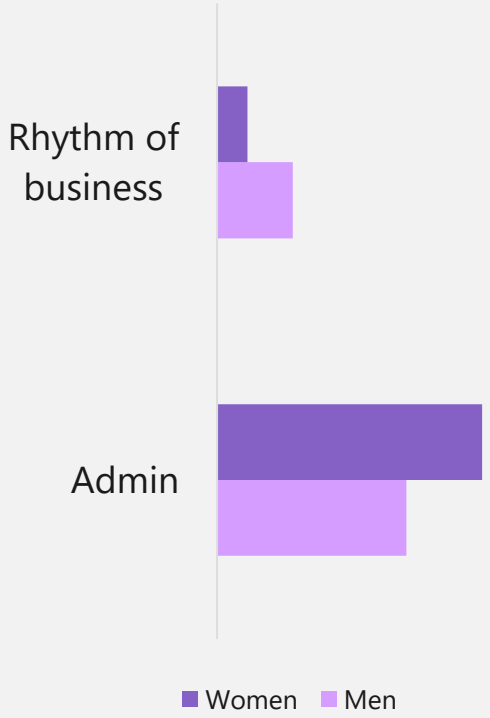
- Employees' ability to grow and advance is impacted by the amount of trust and autonomy provided by their managers.
- Micromanaging and perceived inequities in delegation practices can stunt team members' development and demoralize them.

Are some employees performing more high visibility tasks?

Collaboration hours by keywords and grouped by topic

Company average and differences by gender for rhythm of business and admin work





Sample key word classification

Illustrative example

What it tells us

- On average an employee spends about 27% of their time on rhythm of business activities and 6% of their time on administrative tasks.
- Examining these by gender, female employees are more likely to be performing administrative tasks relative to their male colleagues.

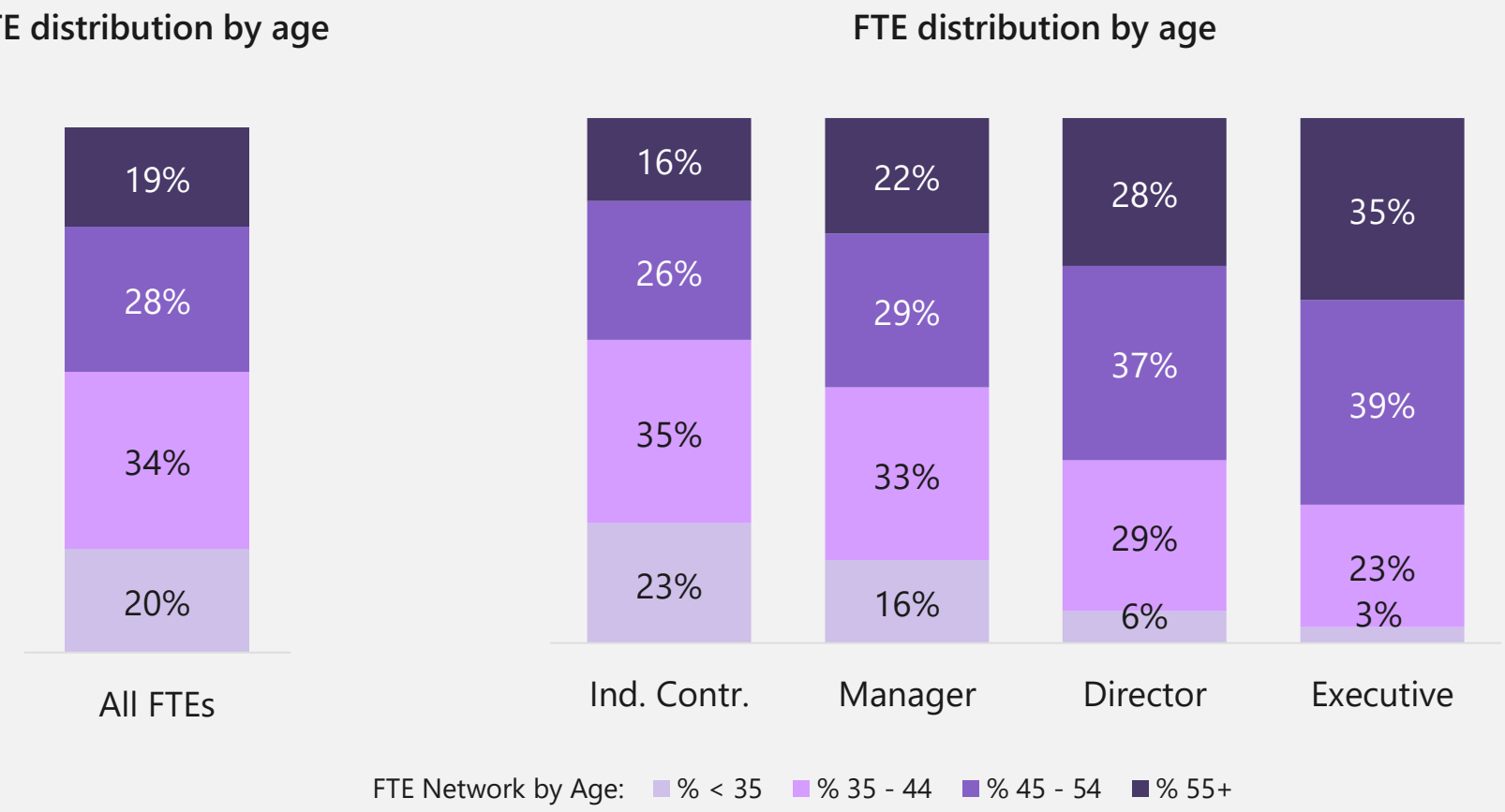
Why it matters

- Studies show that women and other underrepresented groups do more “office housework” and have less access to high visibility work than white males do.
- High visibility work gives greater opportunity for promotions and career development.

Are leaders connected to the next generation of employees?

Network composition by employee age range

Differences by level



Illustrative example

What it tells us

- 20% of the base of full-time employees (FTEs) is less than 35 years of age.
- However, directors and executives in this organization have very limited connections among the next generation of employees and future leaders.

Why it matters

- Leaders with strong connections to people of different demographic backgrounds and skill sets create higher firm value.
- Research suggests that the diversity of leaders' networks is a key ingredient in how they innovate and grow their companies.

Does membership in an ERG help establish a more influential network?

Impact of joining one or more ERGs

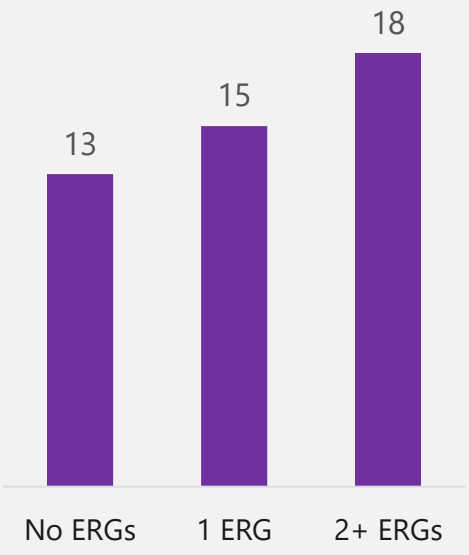
Average hours in leadership 1:1 mentoring and leadership network size

Leadership mentoring

Average number of 1:1 meetings per week with leaders other than direct manager

Leadership network size

Average number of leadership connections



Illustrative example

What it tells us

- ERG participants receive two+ times more 1:1 leadership mentoring and develop significantly more leader connections as compared to non-participants. Participating in more than one ERG provides further benefit.

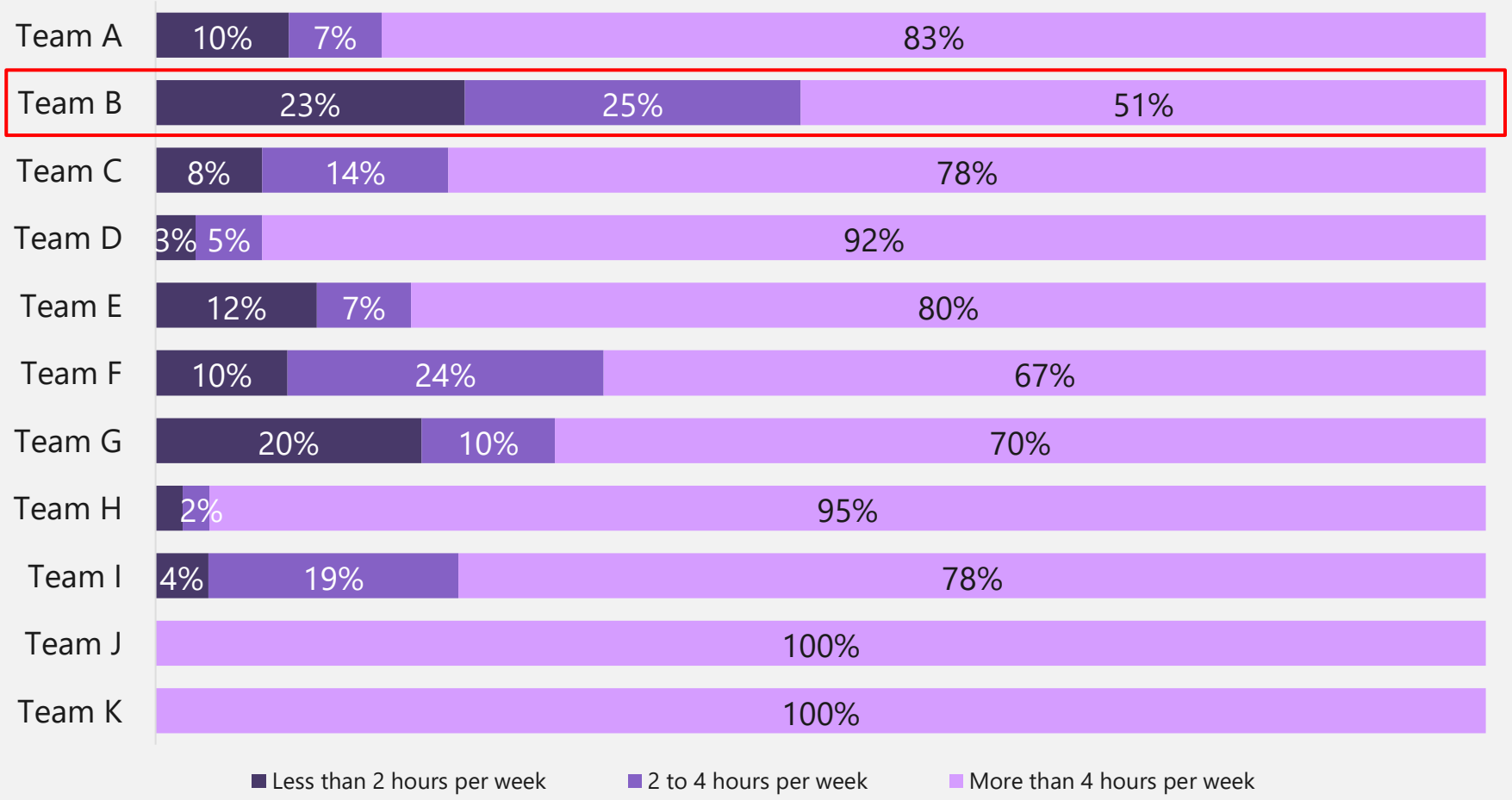
Why it matters

- By cultivating a sense of belonging, employees are empowered to focus on work without worrying about expressing themselves authentically at work. Employee resource groups can help foster feelings of belonging.
- In this case, the ERGs also created the opportunity for career development through greater leadership mentoring and networking.

Are employees meaningfully connecting with peers?

Distribution of employees by weekly hours of small group conversations

Differences by team



Illustrative example

What it tells us

- 11% of employees are spending less than 2 hours per week in small group conversations.
- Team B is a group to watch with 49% of employees spending less than 4 hours per week in small group conversations.

Why it matters

- Employees with very low connectivity (less than 2 hours per week) might be struggling to adapt to the virtual work environment, and their sense of belonging may be eroding.
- Strong peer relationships help employees stay connected to their teams. Feeling isolated has been known to cause up to a 21% decline in employee performance.

Are employees adapting their working patterns for new work-life requirements?

Percentage of employees falling into each working pattern: Pre-WFH compared to Post-WFH

		Pre-WFH	Post-WFH	Change
Less than or equal to 9 hours of active collaboration	Standard workday with breaks	17%	11%	-6%
	Standard workday nonstop	12%	10%	-2%
	Standard workday flexible	63%	59%	-4%
Greater than 9 hours of active collaboration	Extended workday	2%	10%	+8%
	Long or Scattered workday	5%	7%	+2%
	Always On 13h+	1%	3%	+2%

Less employees are now experiencing a standard workday with breaks

A large proportion of employees are now experiencing an extended workday

Illustrative example

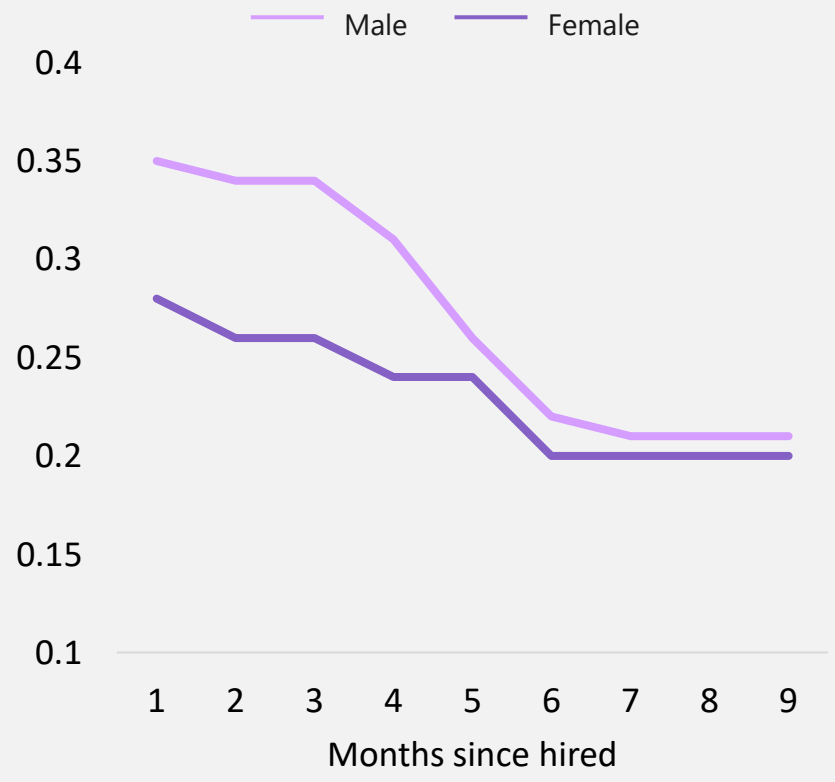
What it tells us

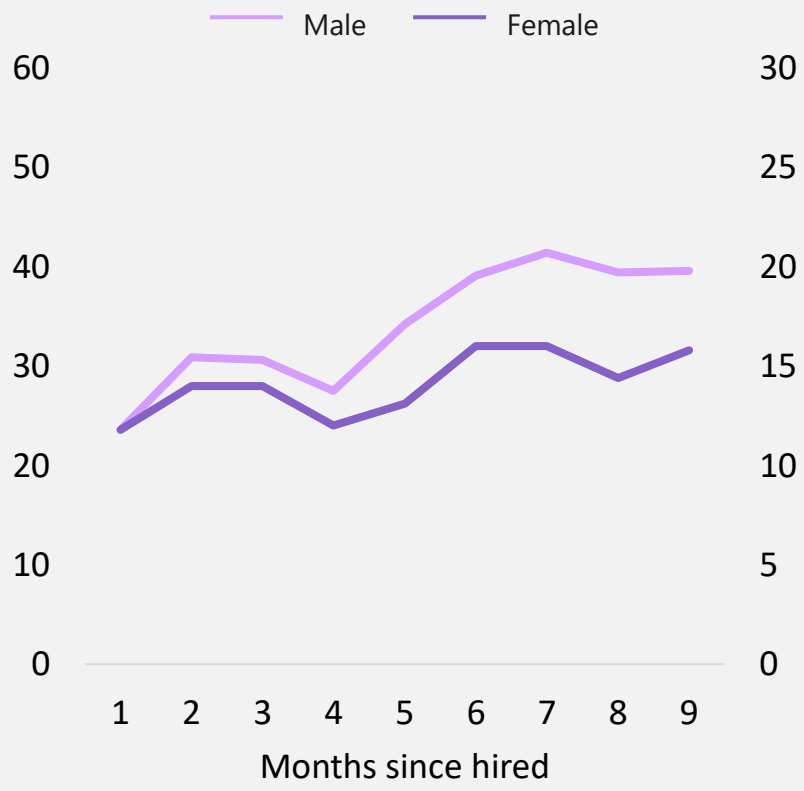
- Employees are actively collaborating more for a greater number of hours each day after shifting to working-from-home (WFH).
- During the baseline period, 92% of employees had 9 hours or less of active collaboration, which has decreased to 80% and stayed at that level since the adjustment period.

Why it matters

- Employees have increasingly diverse needs and expectations for greater flexibility. 96% of U.S. professionals say they need flexibility, but only 47% have it.
- Flexibility has the potential of boosting engagement, and driving productivity, inclusion, and wellbeing.

Are new employees onboarding at the same pace?





Note: New engineers include any employee hired into the engineering function in the last twelve months.

Illustrative example

What it tells us

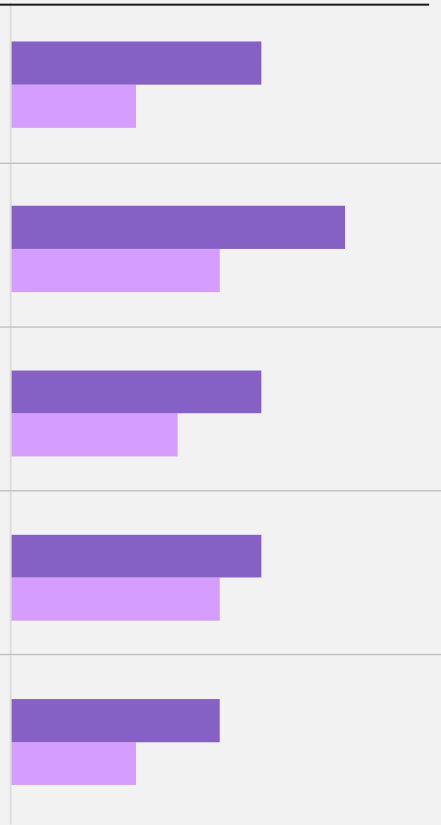
- This analysis provides gender-based insight on the new hires' onboarding & development experience:
  - Male developers are receiving more one-on-one (1:1) time with their manager in the first four months of on-boarding
  - Meanwhile, and perhaps as a consequence, internal network growth happens more quickly for newly onboarded male developers

Why it matters

- Effective and equitable onboarding process can improve employee satisfaction, boost productivity, and help employees build needed relationships to feel connected and confident.
- Organizations with a standardized onboarding process experience 62% greater new hire productivity, along with 50% greater new hire retention.

What employee behaviors lead to promotions?

Organizational factor	Measured by	Promoted employees…
Mentorship	Time with mentor	Spends 2.1X more time in 1:1s with a mentor
Leadership access	Leadership network size	Have 1.9X larger leader networks
Empowerment	Percent of meetings with no manager	Attend 50% more meetings without manager
Workweek expectations	Workweek span	Work 4 hours more per week
Career development	Time in training	Spend 1.6X more time in training



■ Successful employees* ■ Other employees

* Employees promoted in last 6 months

Illustrative example

What it tells us

- Mentorship and leadership access are key factors in employee promotions in this organization.
- Additionally, promoted employees exhibit more autonomy and initiative than their non-promoted peers.

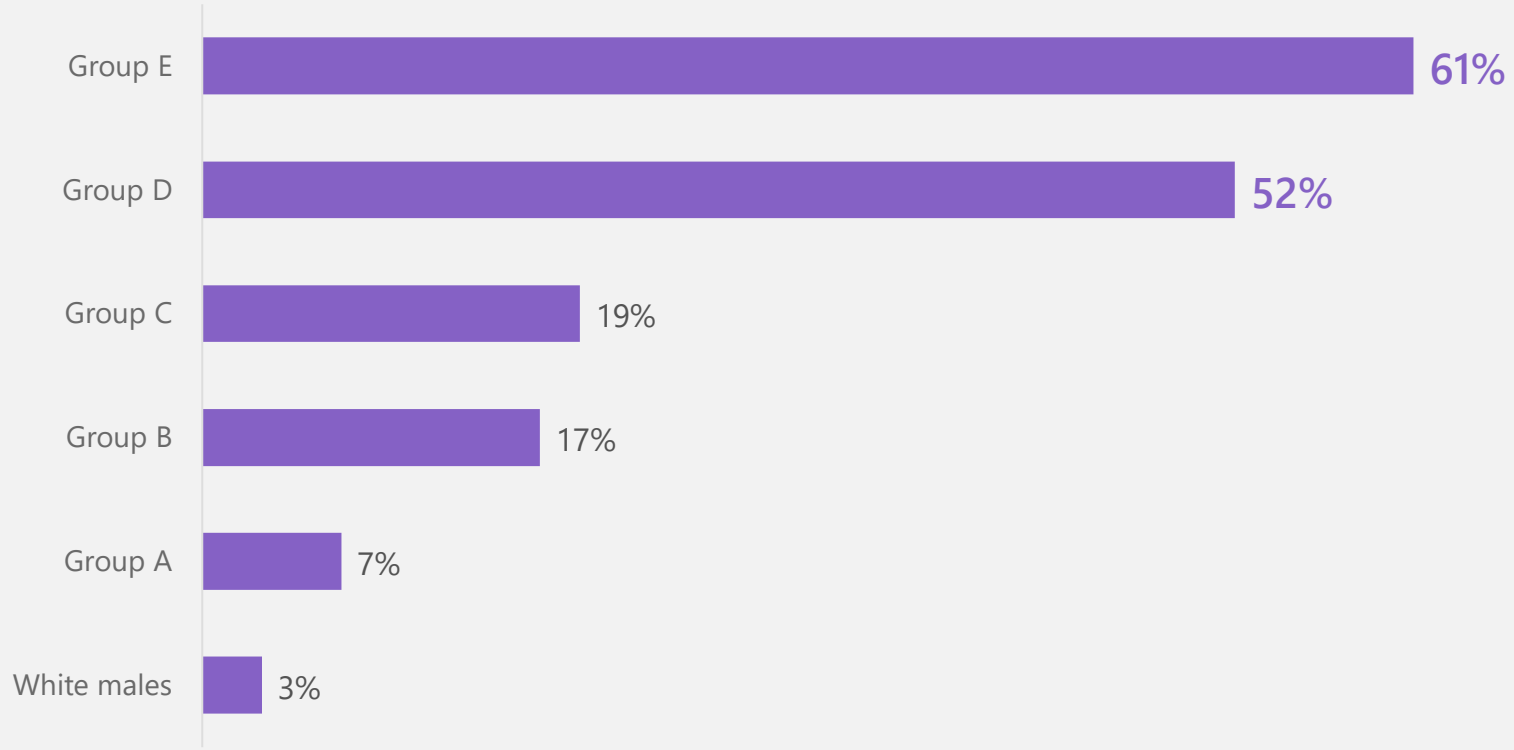
Why it matters

- Designing structured people processes and communicating those processes clearly helps ensure that outcomes are fair and that they are also perceived that way.
- When a promotion process isn't transparent, employees from under-represented backgrounds might be concerned they will be overlooked for a promotion as they don't "fit the mold" of a typical leader.

How frequently do employees go unsupported or unrecognized because they are “the only” in the meeting?

Percentage of meetings in which the employee is “the only” in a meeting

For meetings of 6-18 attendees in size



Illustrative example

What it tells us

- Some under-represented groups in the organization are “the only” in 50 percent or more of their meetings, creating undue stress and pressure from micro-aggressions, such as having their judgement questioned, being required to provide more evidence of competence, or being mistaken for someone at a lower level.

Why it matters

- “The only” is less likely to feel comfortable and supported in contributing to a meeting, and therefore less likely to be recognized.
- Employees from under-represented backgrounds are often less empowered to share ideas. By giving everyone a voice, you can ensure the best ideas are heard.

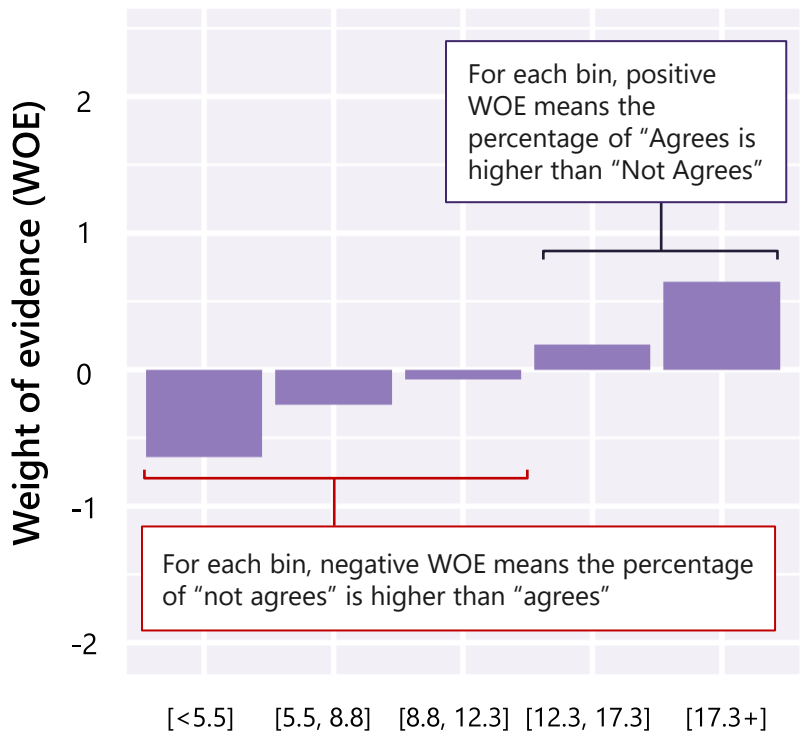
Sample keyword classification

Business process analysis in Workplace Analytics gives you insight into meeting composition and time spent on specific processes by different employees. Keywords help classify meeting and email activity. The following is a good sample list of keywords.

Rhythm of business	Administrative	Training and learning
Monthly	Event planning	Development
Weekly	Expense	Conference
Quarterly	Itinerary	L&D
EOM	Accommodation	Curriculum
Status	Survey	Skills
Business update	License	Onboarding
Annual	Benefits	Education
Team meeting	Overdue	Course
QBR	Award	Training
Steering committee	Reminder	Learn
Board	Booking	Brown bag
	Meeting notes	Enablement

Appendix: Measures used to identify metrics correlated to outcome

Email hours per week
entire Contoso employee population



Information Value (IV)

Quintile	Agrees	WOE	IV
[< 5.5]	21%	-0.64	
[5.5, 8.8]	25%	-0.26	
[8.8, 12.3]	29%	-0.06	
[12.3, 17.3]	34%	0.18	
[17.3 +]	45%	0.64	
Total	35%	--	0.18

IV and predictiveness

Less than 0.02	Not useful for prediction
0.02 to 0.1	Weak predictive power
0.1 to 0.3	Medium predictive power
0.3 to 1.0	Strong predictive power
> 1.0	Very strong predictive power

Definitions

Metrics are considered only if their distribution is significantly different at the .05 level for each binary outcome, such as "agrees" population vs. the "not agrees" population, based on the Kruskal Wallis test.*

Information Value is a measure commonly used to identify the strength of relationship between metrics with respect to a binary outcome. This measure has been used for decades to build predictive outcome models in the credit scoring industry. This data uses a consistent 5 bins (20% of data in each bin) in the computation of Information Value.

Download wpa R package code to compute Information Value (IV) and corresponding visuals from GitHub and run it by using the IV Report function.

- WOE describes the relationship between a predictive variable and a binary target variable. IV measures the strength of that relationship.
- Kruskall-Wallis test evaluates whether the metrics' distributions are significantly different for the two outcome populations

Strength of metric to outcome relationship:

Low	Mid-range	High

Microsoft 365