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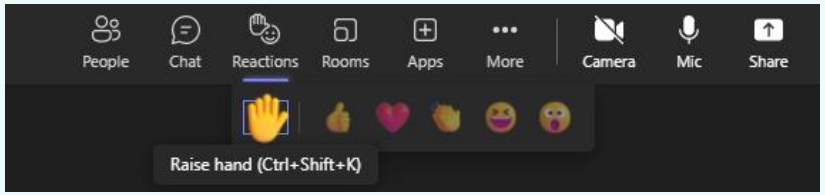
Using Microsoft 365 as a knowledge platform

Webinar, February 7th

www.gravityunion.com

Housekeeping

1. The video **recording** and **slides** will be shared in 1-2 days
2. Use the **chat** for questions, or raise hand to speak
3. Using the arrows under the slides will put you out of sync - use the **Sync** button to get back
4. Captions available under the ellipses (more) menu



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What we're covering

In this session, learn strategies for designing an effective knowledge platform.

Takeaways :

- The benefits of investing in better knowledge sharing
- Tips for adopting new knowledge sharing habits and tools
- Understanding of the knowledge sharing capabilities in Microsoft 365 including search, people profiles and Viva Topics

Note: The focus of this webinar is strategic; please let us know if there is a technology component you would like to "deep dive" in a future webinar.

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Jas Shukla

Senior Consultant

- 10+ years of SharePoint intranet consulting experience
- 15+ years of UX design, consulting, marketing, and product management experience
- Previously with Microsoft as a Program Manager in their SharePoint team
- Collabware Specialist
- University of Waterloo: Management Science and Human Computer Interaction Options

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Dale Arseneault

Chief Knowledge Officer

- 20 years experience in knowledge and information management with the Bank of Canada
- 20 years experience in management consulting, technical consulting, and learning and development
- Former Advisory Board Member for Conference Board Council for Information and Knowledge Management
- Participated in numerous international communities and groups on information and knowledge management
- Business lead for numerous projects including KM, service management, Collabware CLM, Collabspace, SharePoint, digital and business transformation

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About Gravity Union

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Who we are

A boutique compliance-inspired services firm helping organization in digital transformation journey

Microsoft
Solutions Partner

Modern Work

Gold Certified

Collabware Partner

collabware

We're certified as a Great Place to Work!

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Services

SharePoint Microsoft 365 Collabware Collabspace

Vision

Planning

Strategy

Design

Build

Evolve

Using M365 as a knowledge platform

Let's get started!

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Modern Origins of KM

- 1970s – business thinkers – how to improve productivity and competitive advantage
- 1990s and 2000s – height of popularity – books, papers, consulting services, benchmarking organizations (APQC), and communities (SIKMLeader's Forum)
- KM is still used today as valuable lens in context of modern workplace priorities such as innovation, data and AI, decision intelligence, and working with a hybrid workforce.

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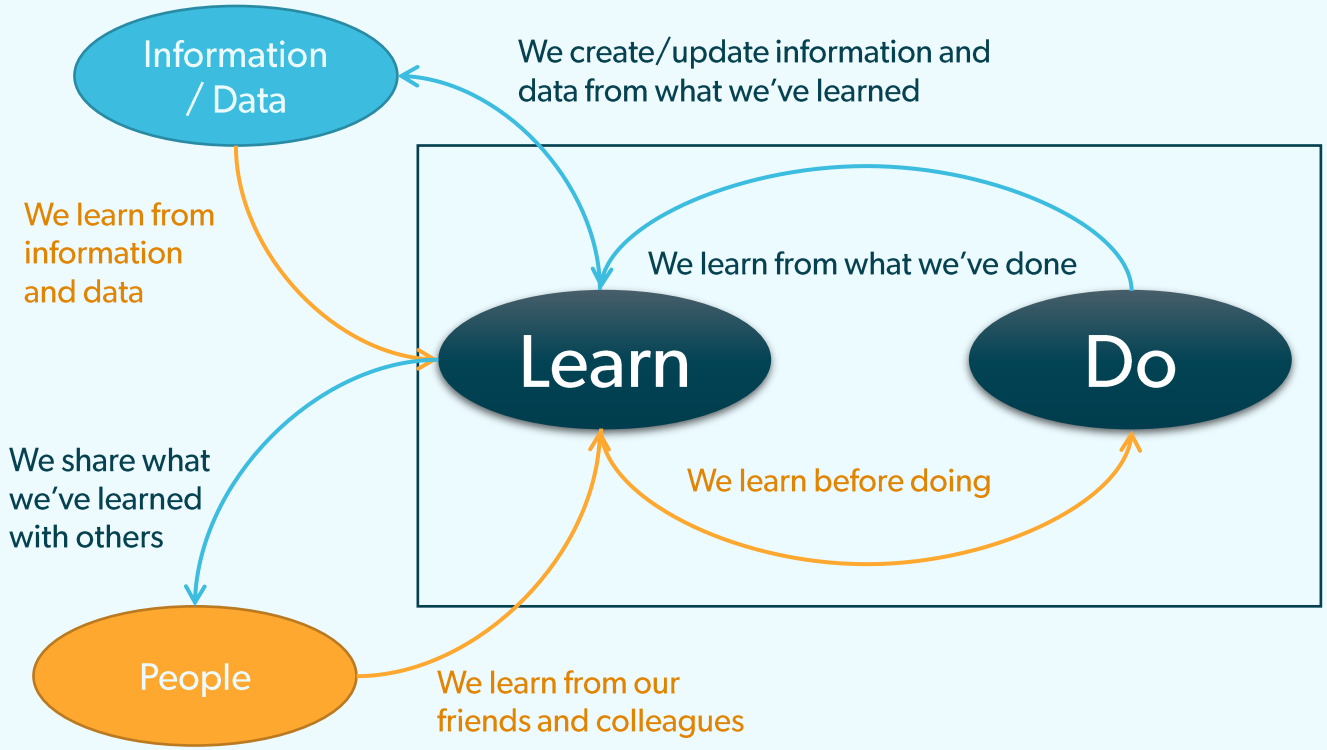
Why do organizations invest in KM?

- In a simplistic form, knowledge management **removes or reduces barriers for people to learn** from data, information, and each other.
- In the context of work, the reason for learning is to get the job done.



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What is your top knowledge management challenge?

Answer in the poll!

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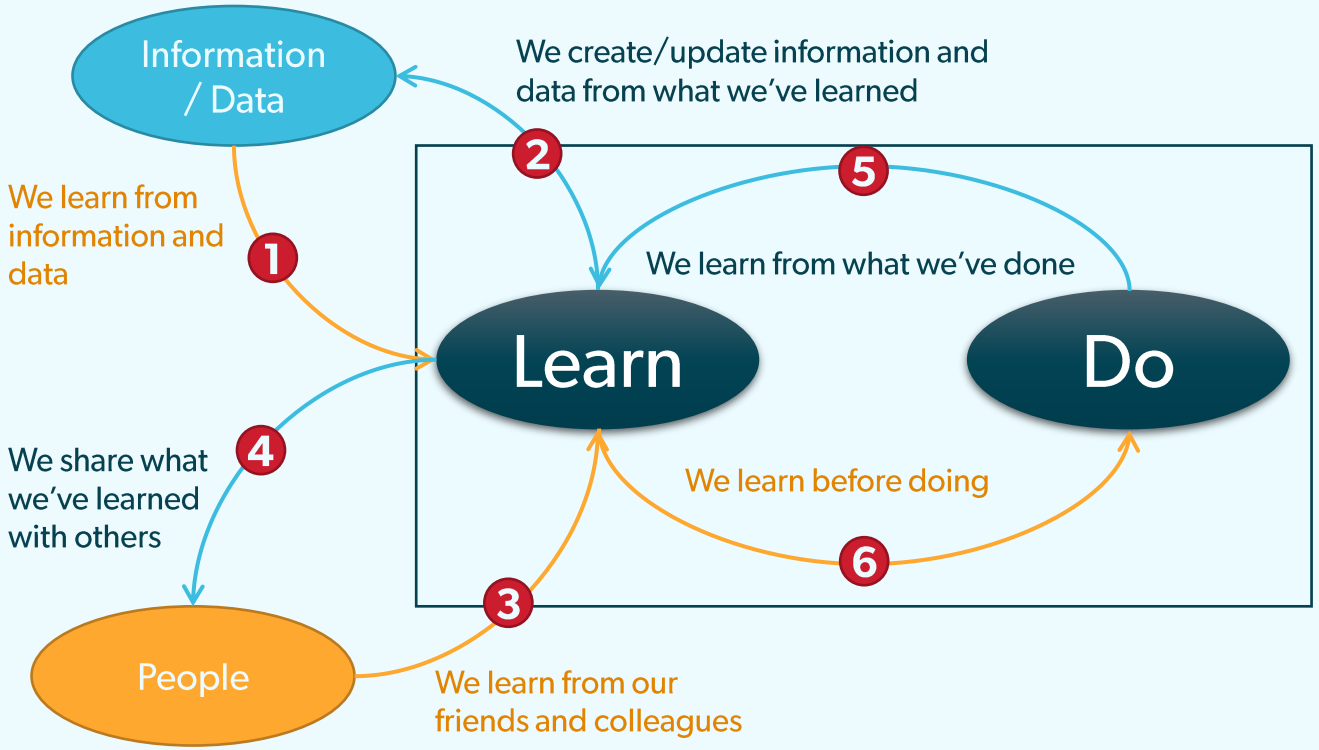
Knowledge Management Pain Points

Though every organization context is unique and solutions must be localized, common **pain points** exist



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1 We (can't) learn from information and data

- Don't know where to look
- There are too many places to look
- Don't know what's most recent, relevant, quality or "authoritative"
- Don't know how to find it
- Don't know that it even exists

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2 We (can't) create/update information and data from what we've learned

- Don't know what's worth saving
- Don't know where to put it
- Don't know how to describe it
- It takes too long and is too difficult
- Don't know if it's important to do or even our "job"

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3 We (can't) learn from our friends and colleagues

- Don't know who knows something that can help me
- Don't know how best to ask for help
- The person who can be most helpful isn't interested in helping

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4 We (can't) share what we've learned with others

- Don't know what has value
- Don't know who needs to know
- Don't know who is even interested in what we can share
- Don't know how to share what we've learned

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5 We (can't) learn from what we've done

- We don't know how to reflect on and learn from what we experience
- We don't reflect and learn consistently for a host of reasons

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6 We (can't) learn before doing

- Too difficult to find relevant information and experts to help
- Don't know how to best engage with and learn from these resources

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Why invest in KM?

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Reducing Pain Points Has Business Impact

- Personal productivity
- Job satisfaction and employee retention
- Creates a work environment that supports hybrid work
- Expedited onboarding
- Organizational performance
- Risk management
- Legislative compliance

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An example of quantifying the benefits

Benefits of Viva Topics (as part of Viva Suite)

75%

Improves productivity via a 75% reduction in content and expert discovery effort

50%

Reduces onboarding time-to-full-productivity by 50%.

$13.1M

Improved employee retention over 3 years for average 7000 person organization

$1.8M/yr

Revenue increase from enabling productivity, increased innovation, and faster time-to-market

Improved productivity from content & expert discovery

Before Viva, knowledge workers spend 1 hour per week and frontline workers spend 30 minutes per week on content and expert discovery.

Faster Onboarding Process

The CEO in real estate shared that it could take two to three years to get employees fully ramped and armed with the information to do their job properly. With Viva Topics, employees fully ramped within six to nine months

Improved Employee Retention

CEO shared "We are getting a bump in retention from the shininess of Viva's functionality. People stay with us because they have a better knowledge experience with Topics."

Improved business outcomes

Large CPG company said that Viva Topics helped with cross-team collaboration and learning. This directly increased shared knowledge and knocked down silos, which ultimately improved R&D potential.

Forrester TEI Viva Sept 2022

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Strategies for Addressing Pain Points

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Strategies for Addressing Pain Points

Connect People

Make it easy to find out who knows what and connect with them:

- Optimize contact cards
- Ensure everyone knows how to access
- Link Microsoft and LinkedIn accounts
- Link to Viva Topics for expertise
- Use Microsoft Delve while available
- Use Teams, SharePoint or Yammer to support community collaboration

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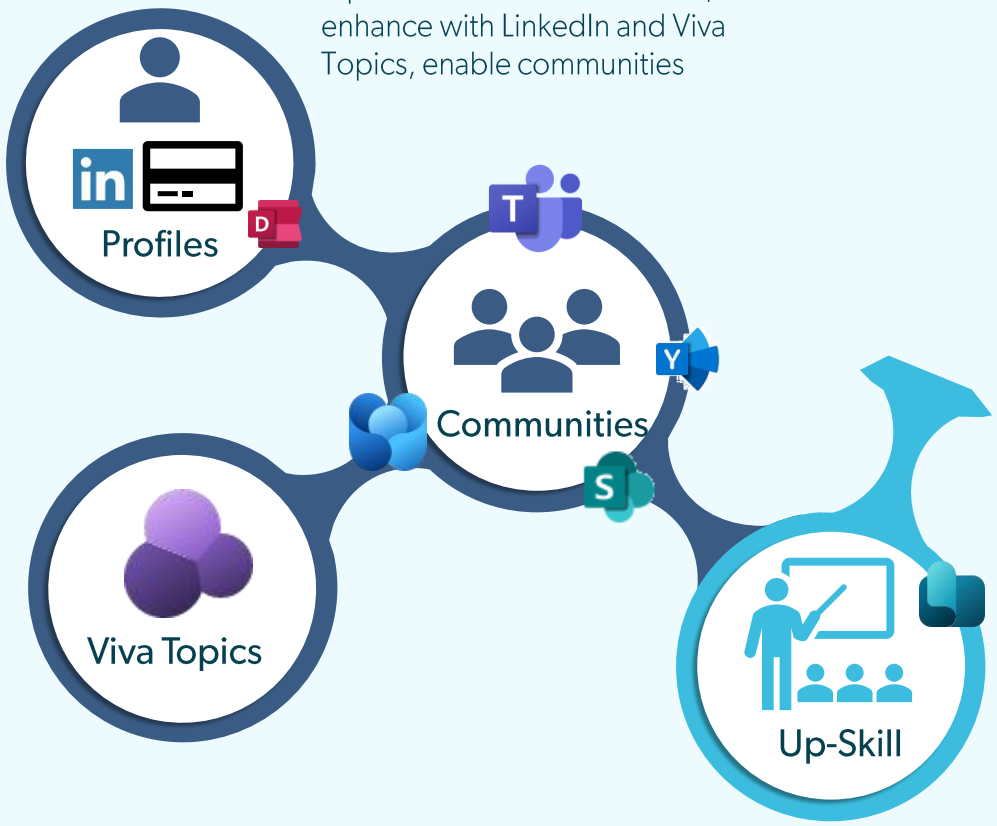
Strategies for Addressing Pain Points

Connect People

Optimize use of contact cards, enhance with LinkedIn and Viva Topics, enable communities



Boost Knowledge and Skill

- Viva Learning for access to learning content developed internally or from 3rd parties
- Partner with HR to define and validate learning content that supports core skills and competencies, including collaboration and knowledge sharing
- Partner with your library to source quality 3rd party learning and information resources
- Continuously curate learning content for quality and relevance
- Target "collections" of learning content to specific communities

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Strategies for Addressing Pain Points

Connect People

Optimize use of contact cards, enhance with LinkedIn and Viva Topics, enable communities

Boost Knowledge and Skill

Partner with HR and others to present relevant learning content in Viva Learning

Manage Content Intentionally

- Store content where it can be accessed and managed rather than siloed repositories
- Adopt an "open access" model to facilitate search and access
- Use thoughtful flat information architecture
- Default and auto-generate metadata wherever possible
- Improve search experiences with features like customized "verticals," Bookmarks, Q&As, customizable web parts
- Extend search to content repositories using Graph Connectors
- Reduce redundant, obsolete and transitory content using Purview for retention /disposition management
- Use Viva Topics in Microsoft Teams to connect people and content

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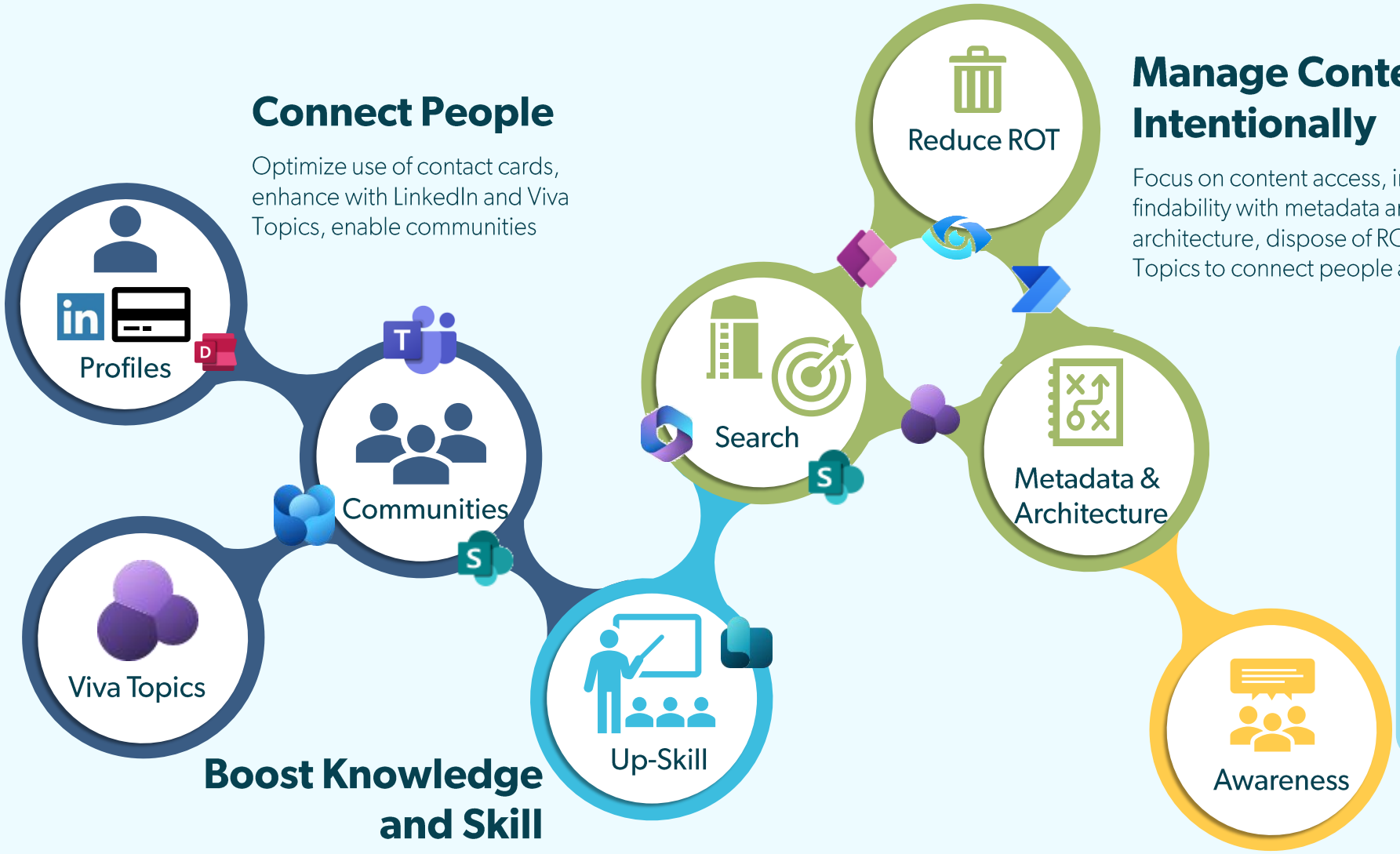
Strategies for Addressing Pain Points

Connect People

Optimize use of contact cards, enhance with LinkedIn and Viva Topics, enable communities

Manage Content Intentionally

Focus on content access, improved findability with metadata and architecture, dispose of ROT, use Viva Topics to connect people and content



Boost Knowledge and Skill

Partner with HR and others to present relevant learning content in Viva Learning

Keep everyone "in the loop"

- Inform everyone about significant changes by publishing a technology evolution roadmap
- Provide a vehicle for regular end-user feedback and input
- Make change management part of the process – help people adapt to ongoing changes

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Strategies for Addressing Pain Points

Connect People

Optimize use of contact cards, enhance with LinkedIn and Viva Topics, enable communities

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Manage Content Intentionally

Focus on content access, improved findability with metadata and architecture, dispose of ROT, use Viva Topics to connect people and content

Keep Everyone "in the loop"

Publish a technology evolution roadmap, provide a vehicle for end-user feedback and input. Make change management part of the process.

Monitor and Evolve

- Access the wealth of M365 data to understand content and actions taken
- Use tools like PowerBI and Gravity Union's MOAT to visualize and analyze M365 data
- Use month over month / year over year trend analysis to monitor progress and changes

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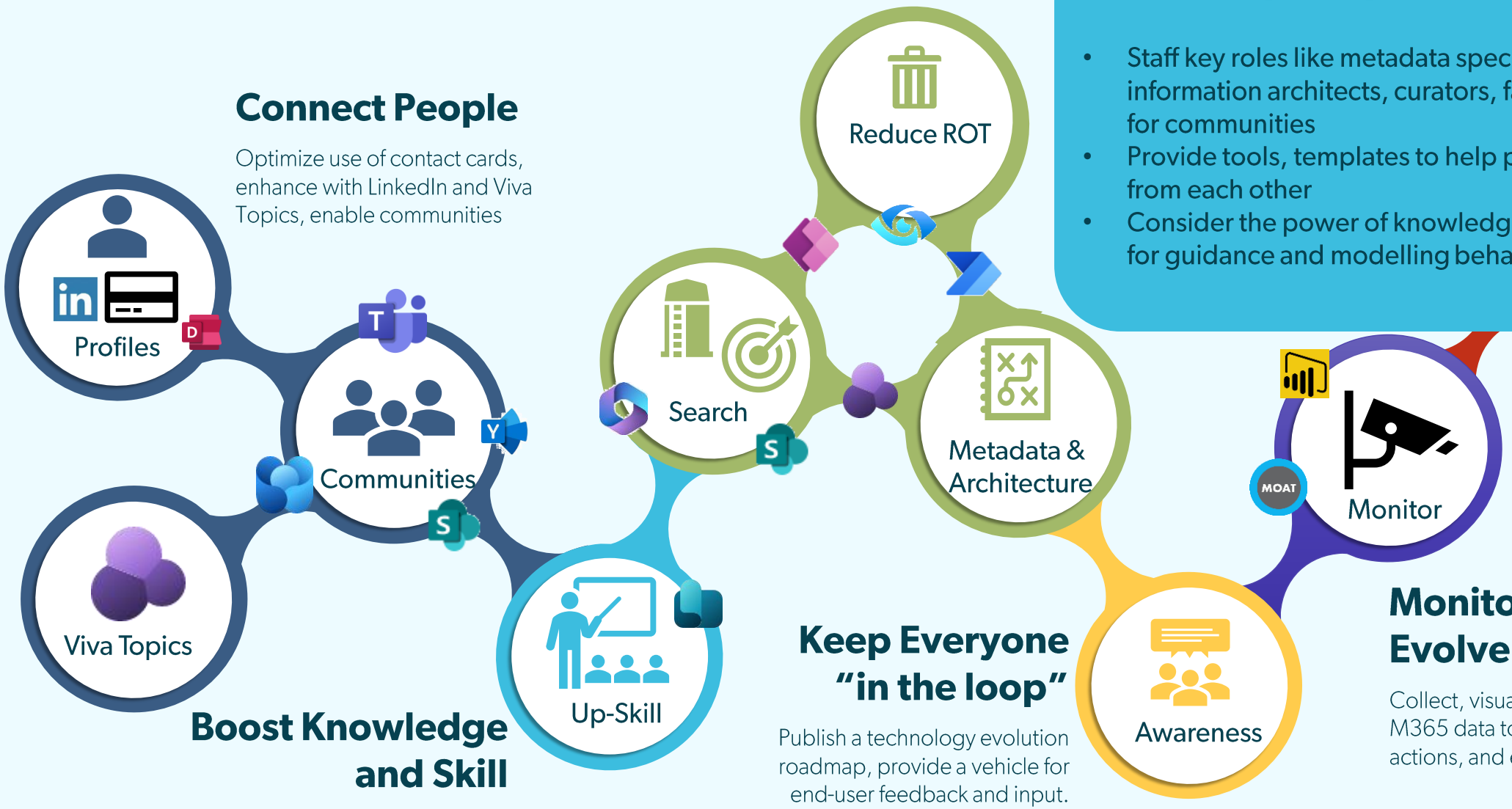
Strategies for Addressing Pain Points

Keep People in Mind

- Staff key roles like metadata specialists and information architects, curators, facilitators for communities
- Provide tools, templates to help people learn from each other
- Consider the power of knowledge leadership for guidance and modelling behaviour

Connect People

Optimize use of contact cards, enhance with LinkedIn and Viva Topics, enable communities



Boost Knowledge and Skill

Partner with HR and others to present relevant learning content in Viva Learning

Keep Everyone "in the loop"

Publish a technology evolution roadmap, provide a vehicle for end-user feedback and input. Make change management part of the process.

Monitor and Evolve

Collect, visualize and analyze M365 data to learn, inform future actions, and evolve.

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Strategies for Addressing Pain Points

Connect People

Optimize use of contact cards, enhance with LinkedIn and Viva Topics, enable communities

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Manage Content Intentionally

Focus on content access, improved findability with metadata and architecture, dispose of ROT, use Viva Topics to connect people and content

Keep Everyone "in the loop"

Publish a technology evolution roadmap, provide a vehicle for end-user feedback and input. Make change management part of the process

Keep people in mind

Metadata and IA specialists, curators, facilitators, knowledge leadership, knowledge processes

Monitor and Evolve

Collect, visualize and analyze M365 data to learn, inform future actions, and evolve

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Demos

Connect people

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Finding “who knows what”

- People are embedded throughout Microsoft Search
- Dynamic profile cards with content that is shared to you
- Connect to external knowledge on LinkedIn

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Topic Center - | Expanding our | Mail - Megan | The Landing - | using microsoft | SharePoint ad | Settings - Mic | People Search | New tab

https://m365x69363625.sharepoint.com

Subscriptions - Mic... | SharePoint admin c... | Teams Admin | Topic Center - Home | Contoso Learning -... | Operations - Home

Contoso Electronics SharePoint

Search in SharePoint

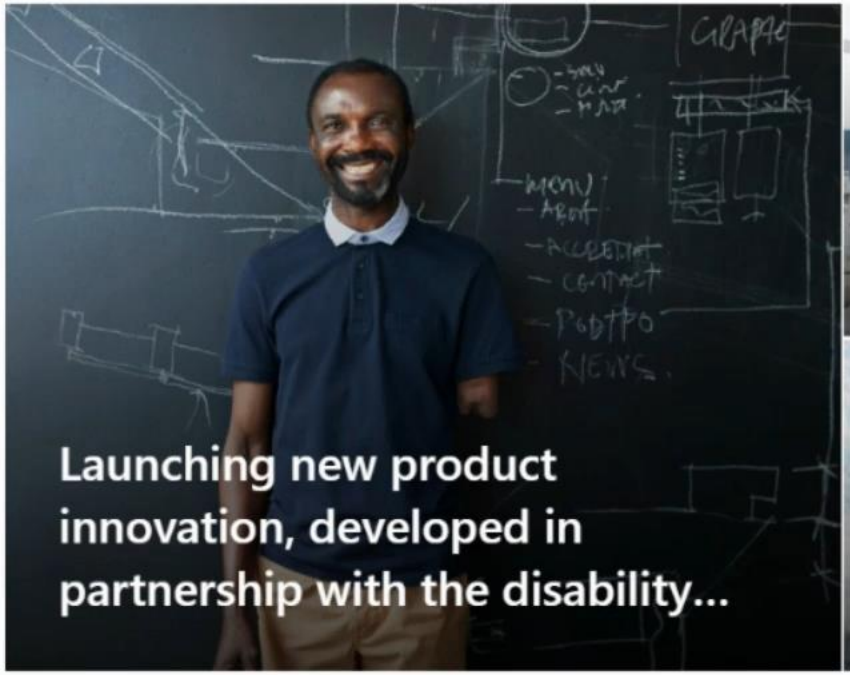
The Landing

Who we are | What's happening | Find it | My SharePoint | Dashboard | Edit

Not following | Share

New | Page details | Analytics

Published | Edit



Contoso HQ

10:50 AM Tuesday, 1/10/2023

Employee updates and resources

What you need to know about Contoso's workplace policies during...

Dashboard

See all

Time off

11 days

Currently available paid time off

Company feed

Topic Center - Home | Expanding our business | Mail - Megan Bowen - Outlook | The Landing - Search

https://m365x69363625.sharepoint.com/_layouts/15/search.aspx/people?q=sales

Subscriptions - Mic... | SharePoint admin c... | Teams Admin | Topic Center - Home | Contoso Learning -... | Operations - Home

Contoso Electronics SharePoint

sales

All Files

Feedback

Miriam Graham

Director • Sales & Marketing

Send email Start chat

Overview | Contact | Organization | Files | LinkedIn

Contact information

Email
miriamg@m365x69363625.

Chat
miriamg@m365x69363625.o...

Work phone
+1 858 555 0109

Office location
131/2103

Job title
Director

Department
Sales & Marketing

Show more contact information

Organization

Manager

People reporting to Miriam Graham (9)

Patti Fernandez
President

Alex Wilber
Marketing Assistant

Christie Cline
Buyer

Isaiah Langer
Sales Rep

Adele Vance
Retail Manager

BP

+5 others
Bianca Pisani, Cameron White and

Marketing Assistant

AlexW

Communities

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Connecting through communities

Communities:

Typically, horizontally connected people in an org

Places where people discover what's happening, share news and knowledge, and build relationships

Examples: PM group, managers @ Contoso, technology champions

Workgroups:

Typically, task-based or org-structure based

Places where people collaborate on work through chat, meeting virtually and sharing files

Examples: 2023 marketing strategy, beta product release, finance team

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Search

Gravity Un

Learning Center | Posts | Files | Home | Channel calendar | Lunch & Learns | M365 Training | Yammer Community | Teams Training Centre | +

Consolidate Teams chats, SharePoint content and Yammer with tabs

Reply

December 27, 2022

Jeff Dunbar 2022-12-16 12:25 p.m.

Deeper SAP Integration for Power Platform

Here's a blog article highlighting some new pre-built apps and flows available for SAP integrations. This was a question I had from a client previously about M365 and SAP and how they integrate (if at all). It leads to a larger question around the future of "integrations". As we move to the cloud the way we integrate 3rd party systems and tools, perhaps is changing. Many companies or even Microsoft themselves are building connectors, power automate actions, prebuilt apps, etc. leveraging open api's. This makes our lives easier in a sense, but can also

See more

Announcing Deeper SAP Integration for the Power Platform

Microsoft's acquisition of Clear Software has led to new functionality for organizations running SAP in Power Apps, Power Automate, and Logic Apps that will enable large-scale adoption of the Power...

powerautomate.microsoft.com

2

7 replies from Ashley, Charles, Dale, and Jonathan

Reply

January 9, 2023

Jeff Dunbar Monday 3:24 p.m.

Excels new Automate tab

If you haven't noticed it yet, there is a new Automate tab in excel. You can create scripts or configure and launch Power Automate workflows directly out of your excel file. This adds a lot of potential to automation efficiency. Instead of trigger things out of SharePoint you could trigger them directly out of the file itself.

See more

Get more done with Excel and Power Automate!

Excel's new Automate tab allows you to tackle your automation needs quickly using Power Automate. All from within the same tab, you can build Office Scripts and enhance their capabilities using Pow...

powerautomate.microsoft.com

3

Reply

New conversation

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Lunch & Learns

What are Lunch & Learns?

Lunch & Learns (L&L) are internal learning sessions hosted by someone on our team. We usually host them starting at 12:15pm Pacific, so that the majority of the team can tune in while having their lunch. We don't have to host them at lunch, but it does help with participation.

You can watch previous recordings and view past presentation PowerPoints here. L&Ls are grouped by the nature of the presentation topic (marketing and brand, people and culture, and technology)

Please follow-up with the presenter if you have any questions.

Do you have a topic you'd like to share with everyone? Contact:

Mami Parsons
Vice President

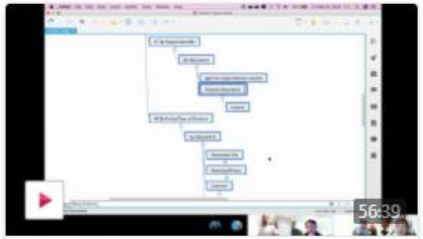
Jeff Dunbar
Digital Transformation Analyst

Most recent Lunch & Learns

Learning Laboratory

BA Huddle - AMA (Ask me anything)

Jas Shukla
Edited December 14, 2022



Learning Laboratory

BA Huddle

Jeff Dunbar
Edited December 13, 2022

Learning Laboratory

Jeff Dunbar
Edited December 13, 2022

Learning Laboratory

BA Huddle: Changing landscape of M... oint as a platform (hosted by Jeff)

Jeff Dunbar
Edited December 13, 2022

Organize and tag recordings

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Boost knowledge and skill

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Viva Learning

- Embed learning into Teams by connecting to 3rd party catalogues and SharePoint content
- With M365 licenses, you get access to **LinkedIn** Learning select free content, Microsoft Learn, Microsoft 365 Training and **content in SharePoint**
- A Viva license is required to connect to other learning management systems (e.g. SuccessFactors)
- Is Viva Learning an LMS? Sort of

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The Landing - Search | Expanding our business | (9) Viva Learning | Microsoft Tea

https://teams.microsoft.com/_#/apps/2e3a628d-6f54-4100-9e7a-f00bc3621a85/sections/MyLearning

Subscriptions - Mic... | Intranet Home | SharePoint admin c... | Teams Admin | Topic Center - Home | Contoso Learning -... | Operations - Home

Microsoft Teams

Search

Activity | Chat | Teams | Calendar | Calls | Files | Viva Conne... | Insights sim | Viva Insights | Viva Learni... | Apps | Help

Viva Learning | Home | My Learning | Manage | Admin

Welcome back

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Megan
Marketing Manager

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06 Bookmarked
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Featured

Managing Projects with Microsoft Teams

Heather Severino | Course | 2h 8m

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Your saved interests

Business Strategy | Collaboration | Marketing | +1 other | Edit

Mobile Marketing Strategy 0

Scaling Your Cybersecurity and Pri... 0

B2B Marketing: Pricing Strategies 0

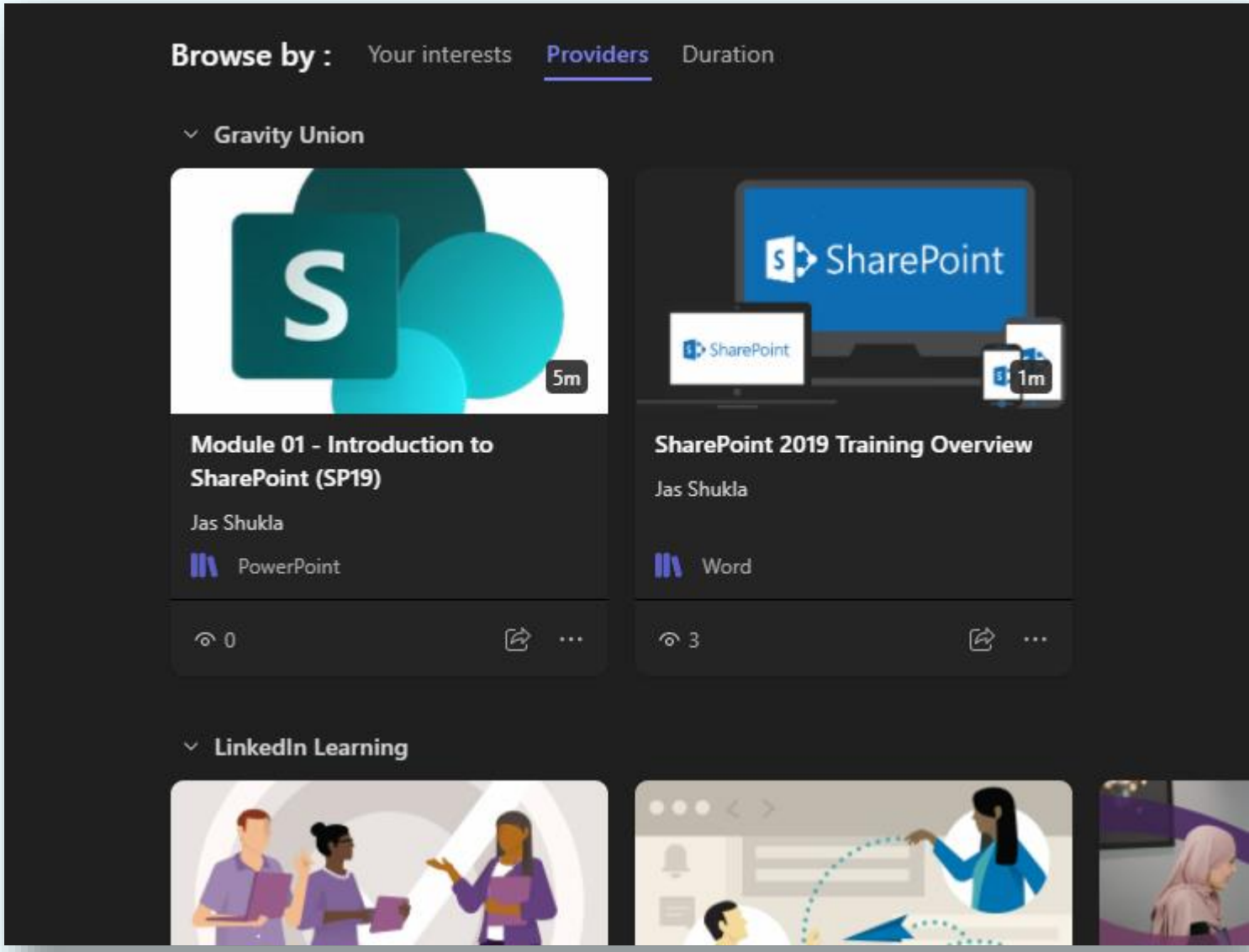
Browse by : Your interests | Providers | Duration

Business Strategy

See all

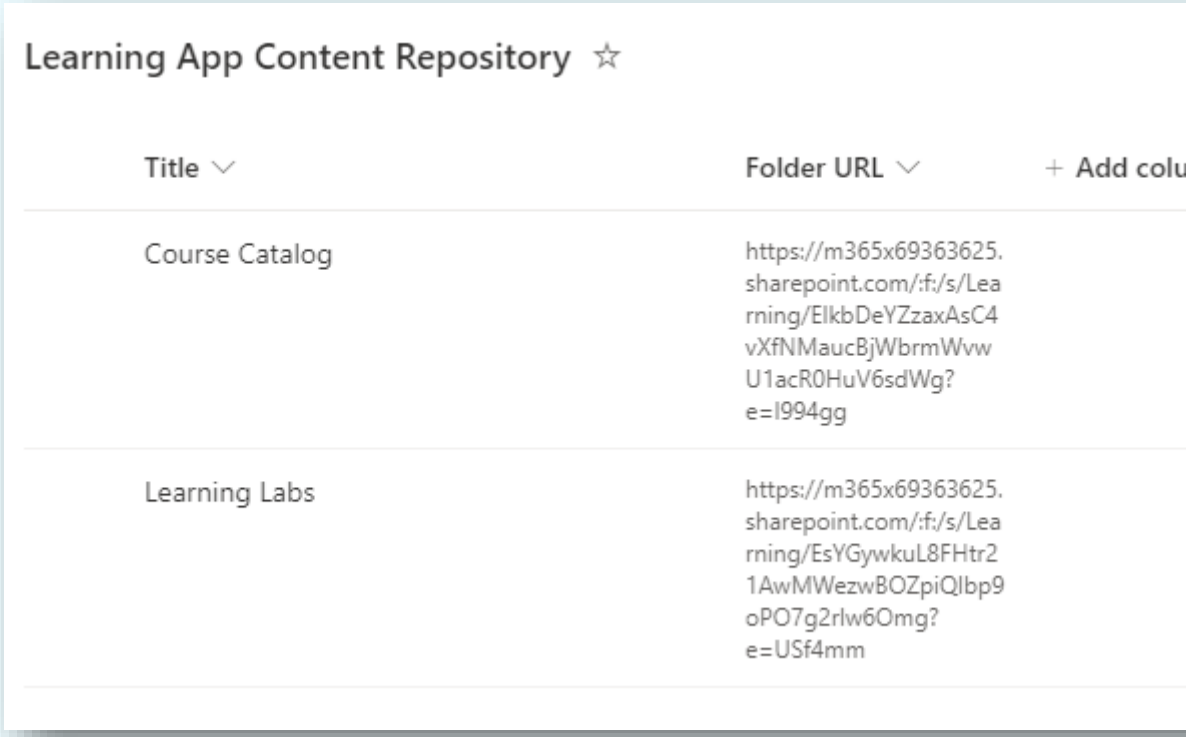
Bring content from SharePoint

- Upload and share SharePoint pages, Streams, files
- Assign learning curators to make learning content available for their team



Checklist: connect Viva Learning to SharePoint

- [x] Choose a main Learning site in your employee portal for the connection
- [x] Group learning content into folders in a document library (!)
- [x] Set permissions on each folder to a Microsoft 365 group
- [x] Point the Viva Learning admin setting to learning site, add items to the list it creates
- [x] Be patient - wait a day or so for Viva Learning to sync into Teams



Learn more: https://learn.microsoft.com/en-us/viva/learning/configure-sharepoint-content-source

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Manage content intentionally

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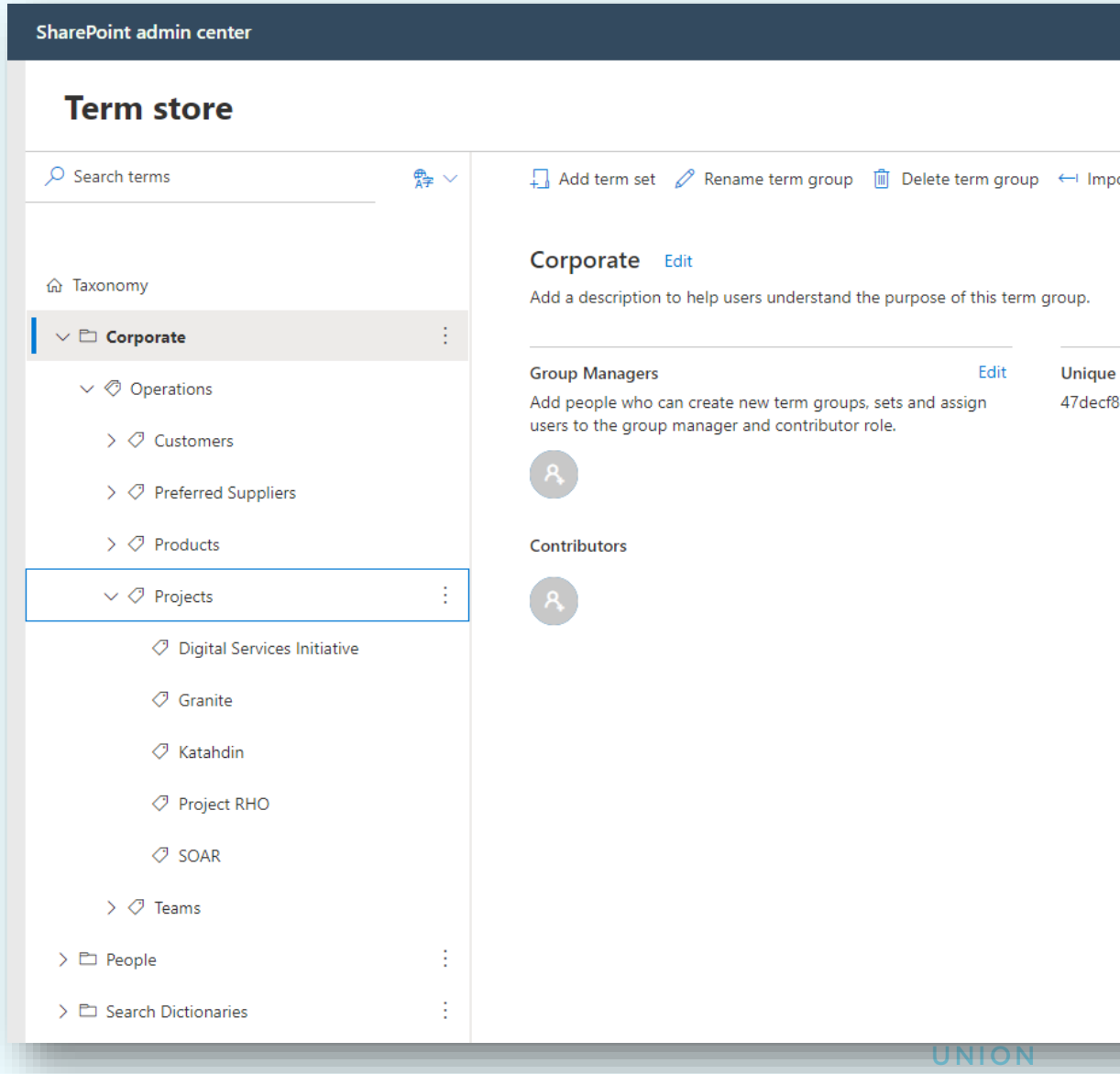
Metadata and IA

- Don’t bring your folder structure into SPO!
- Plan your metadata approach with **Content Types** and the **Term Store**
- A great user experience means more focus on getting value from information and knowledge



Viva Topics

- “Internal Wikipedia”
- Generate 1000s of Topics from your organization’s data, securely
- Suggested drafts of Topics pages created by AI
- Save time with company wide understanding on “who knows what” and key resources to access
- Share and reuse #topics across apps, intranet, email, chats
- Requires a Viva license

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Topic Center - Home | Expanding our business

https://m365x69363625.sharepoint.com/sites/operations/SitePages/Expanding-the-Digital-Services-Initiative.aspx

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Contoso Electronics SharePoint

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Operations

Public group | Not following | 19 members

Home
Conversations
Notebook
Pages
Digital Services Initiative
Documents
Site contents
Recycle bin
Edit

New | Send to | Promote | Page details | Immersive Reader | Analytics | Published 11/21/2022 | Edit

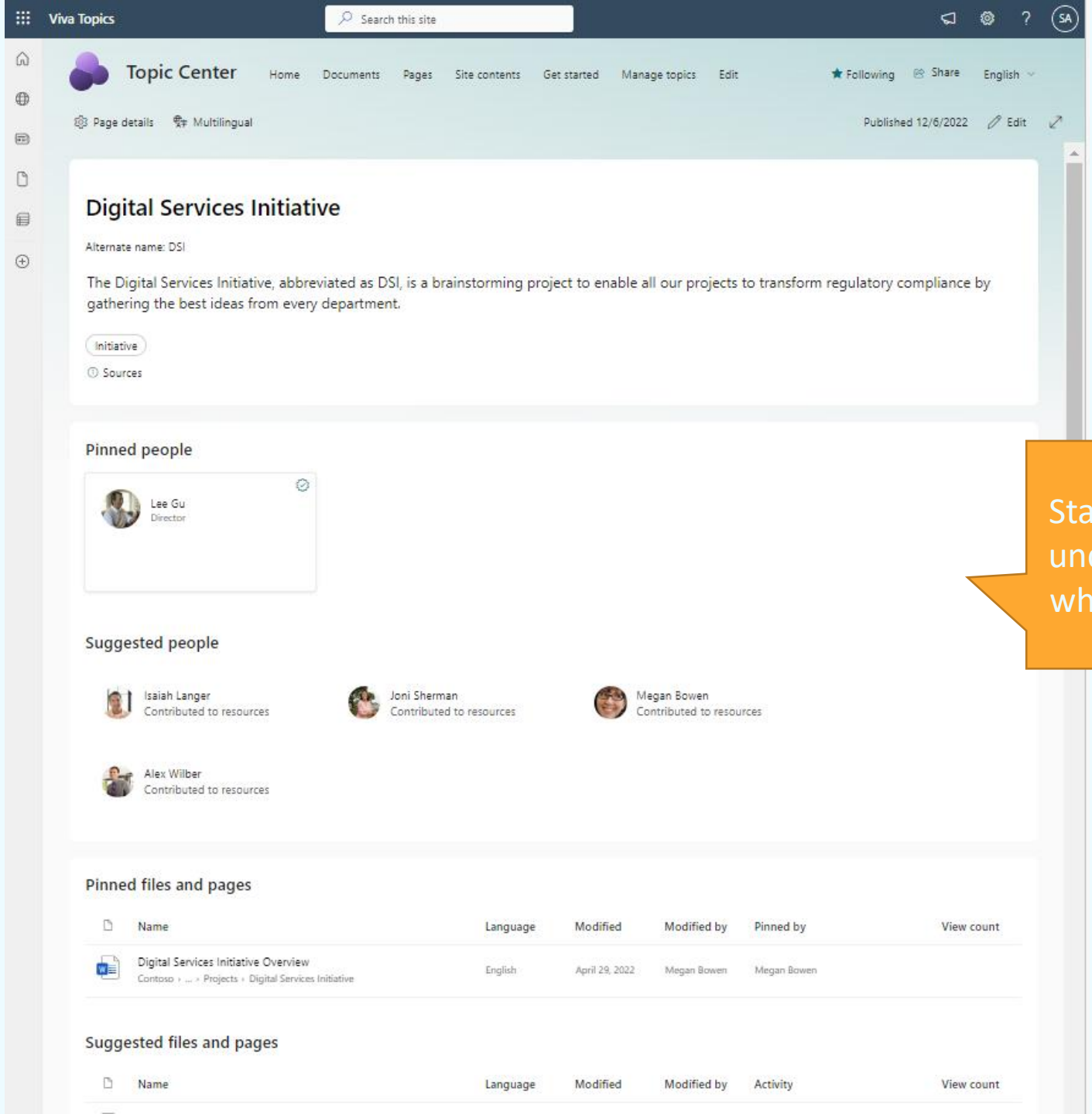
Expanding our business

Alex Wilber
Marketing Assistant

Contoso's Operations team is proud to announce the Digital Services Initiative. This initiative is a brainstorming project to enable all our teams to transform regulatory compliance by gathering the best ideas from every department. We've already piloted it in the Operations team, and we're very pleased with the success.

In addition, we've rolled out this plan as an innovative value-add service to three of our strategic partners. The success of this proof of concept was phenomenal. Now we're planning to expand this project to several of our top regional customers!

Like | Comment | Save for later



Starts to build an understanding of who knows what

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The Landing - Search | Expanding our business | Digital Services Initiative | (9) Viva Learning | Microsoft Tea

https://m365x69363625.sharepoint.com/sites/TopicCenter/SitePages/Digital-Services-Initiative.aspx?ls=Annotation_ANNOTATION

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Contoso Electronics | Viva Topics | Search this site

ContosoPedia

Home | Documents | Pages | Site contents | Get started | Manage topics | Edit

Not following | Share | English

Page details | Multilingual | Published 12/6/2022 | Edit

Digital Services Initiative

Alternate name: DSI

The Digital Services Initiative, abbreviated as DSI, is a brainstorming project to enable all our projects to transform regulatory compliance by gathering the best ideas from every department.

Initiative

Sources

Pinned people

Lee Gu
Director

Suggested people

Joni Sherman
Contributed to resources

Isaiah Langer
Contributed to resources

Megan Bowen
Contributed to resources

Viva Topics

Search this site

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Page details | Multilingual | Published 12/6/2022 | Edit

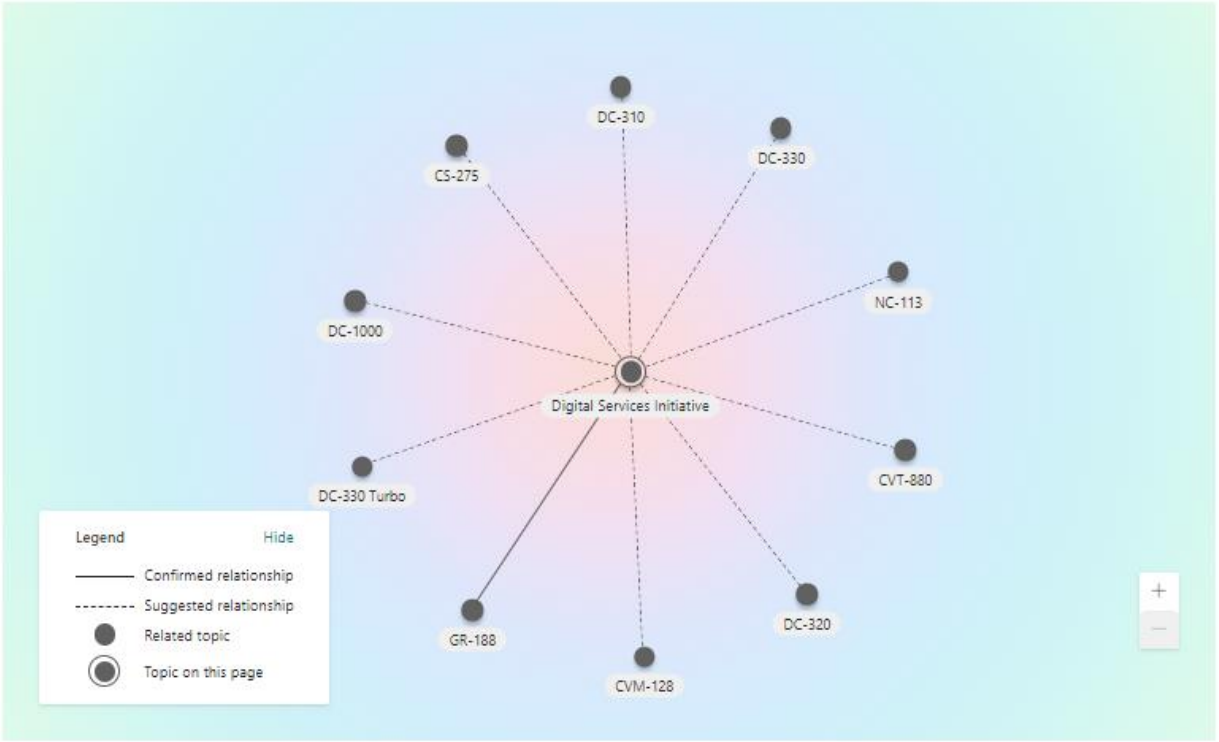
Digital Services Initiative Datasheet SalesAndMarketing › ... › Digital Services Initiative	English	October 20, 20...	Megan Bowen	Topic mentioned 4 times
Digital Services Initiative Milestones operations › ... › Digital Services Initiative	English	September 26,...	Joni Sherman	Topic mentioned once in this file

See more

Suggested sites

- Operations — Suggested based on resources
- Contoso — Suggested based on resources
- Sales and Marketing — Suggested based on resources
- U.S. Sales — Suggested based on resources
- Contoso Team — Suggested based on resources
- Leadership Team — Suggested based on resources

Related topics



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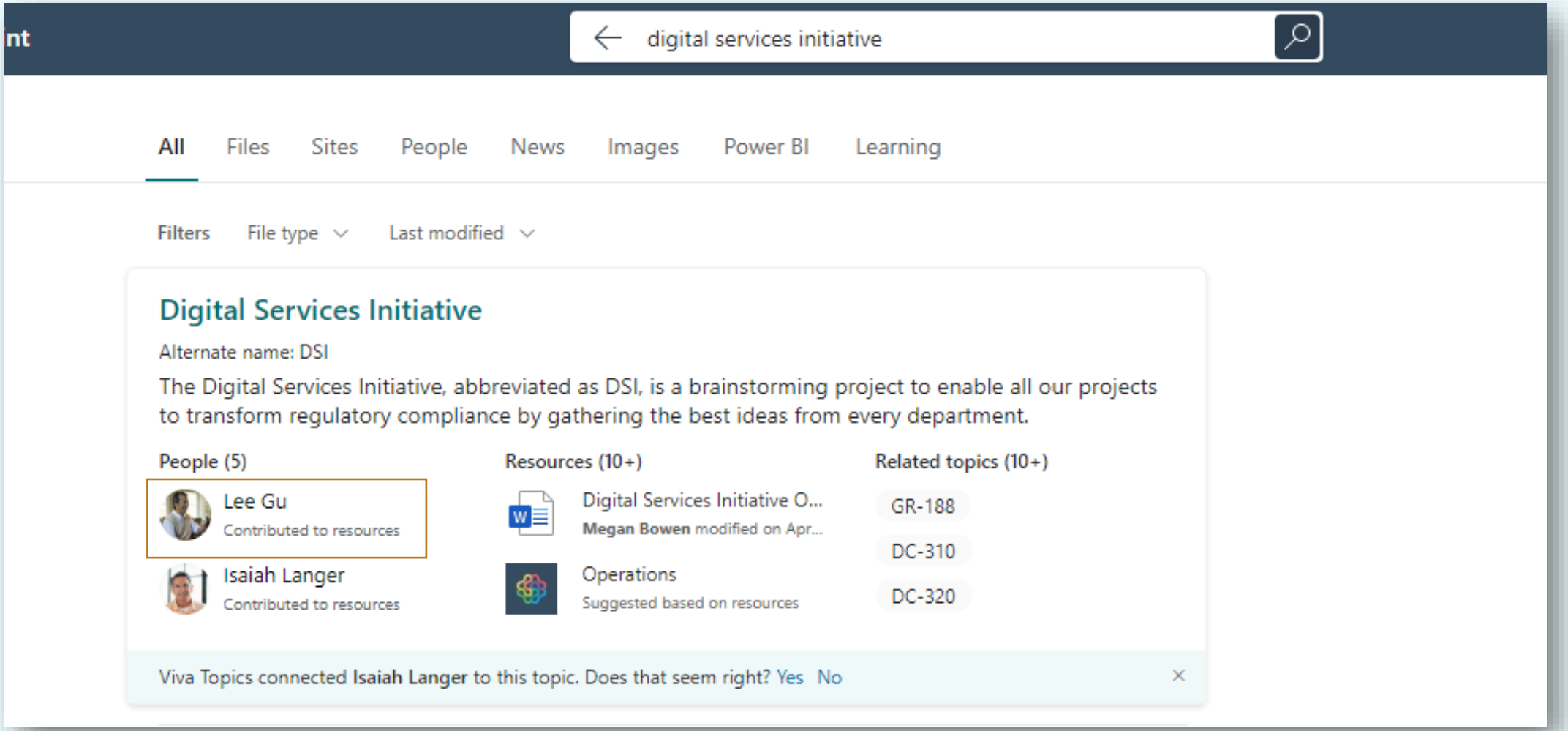

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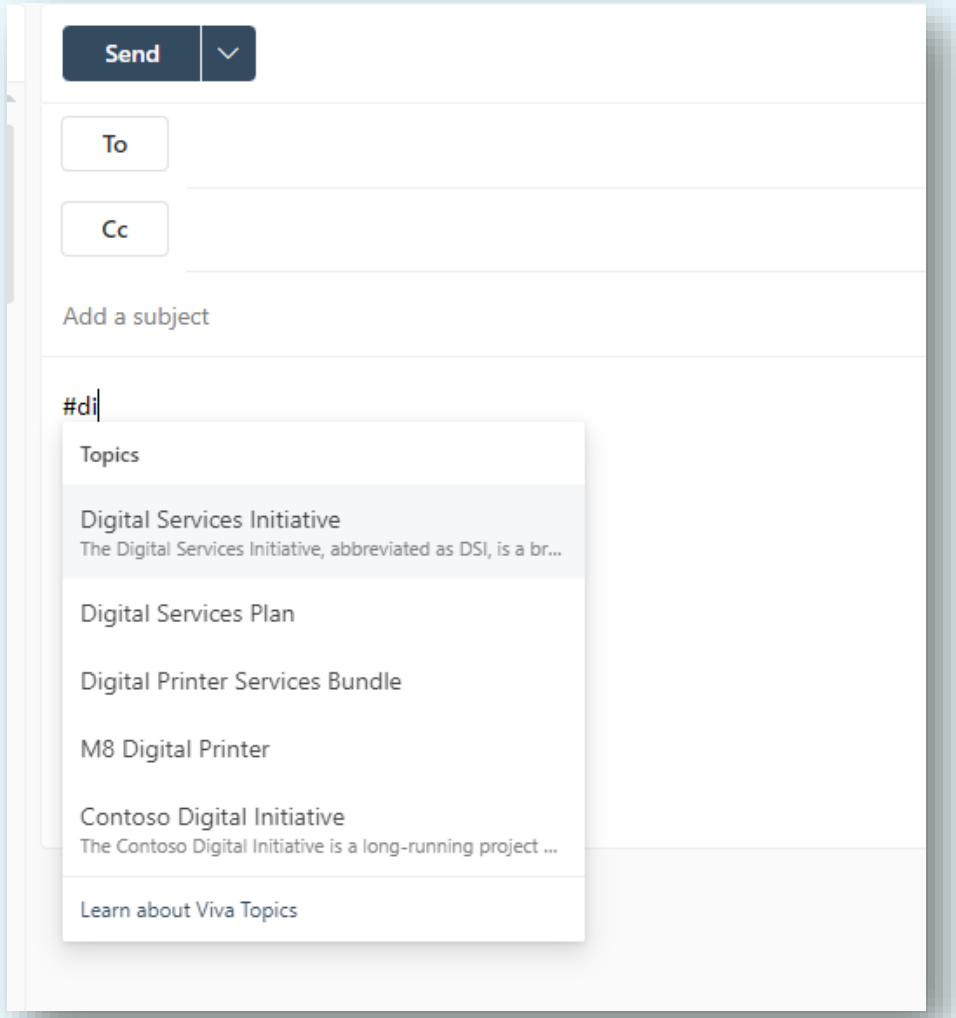
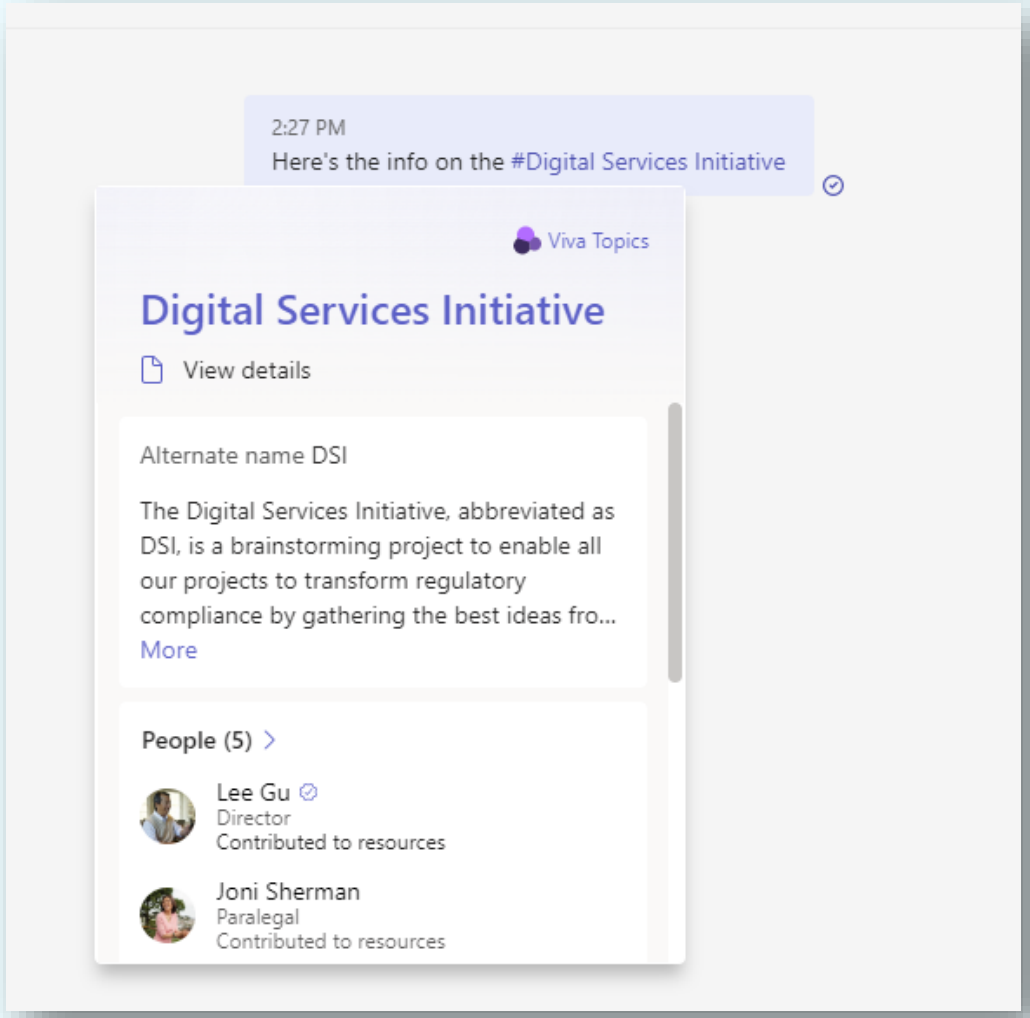
Discover topics throughout M365

Outlook



Teams



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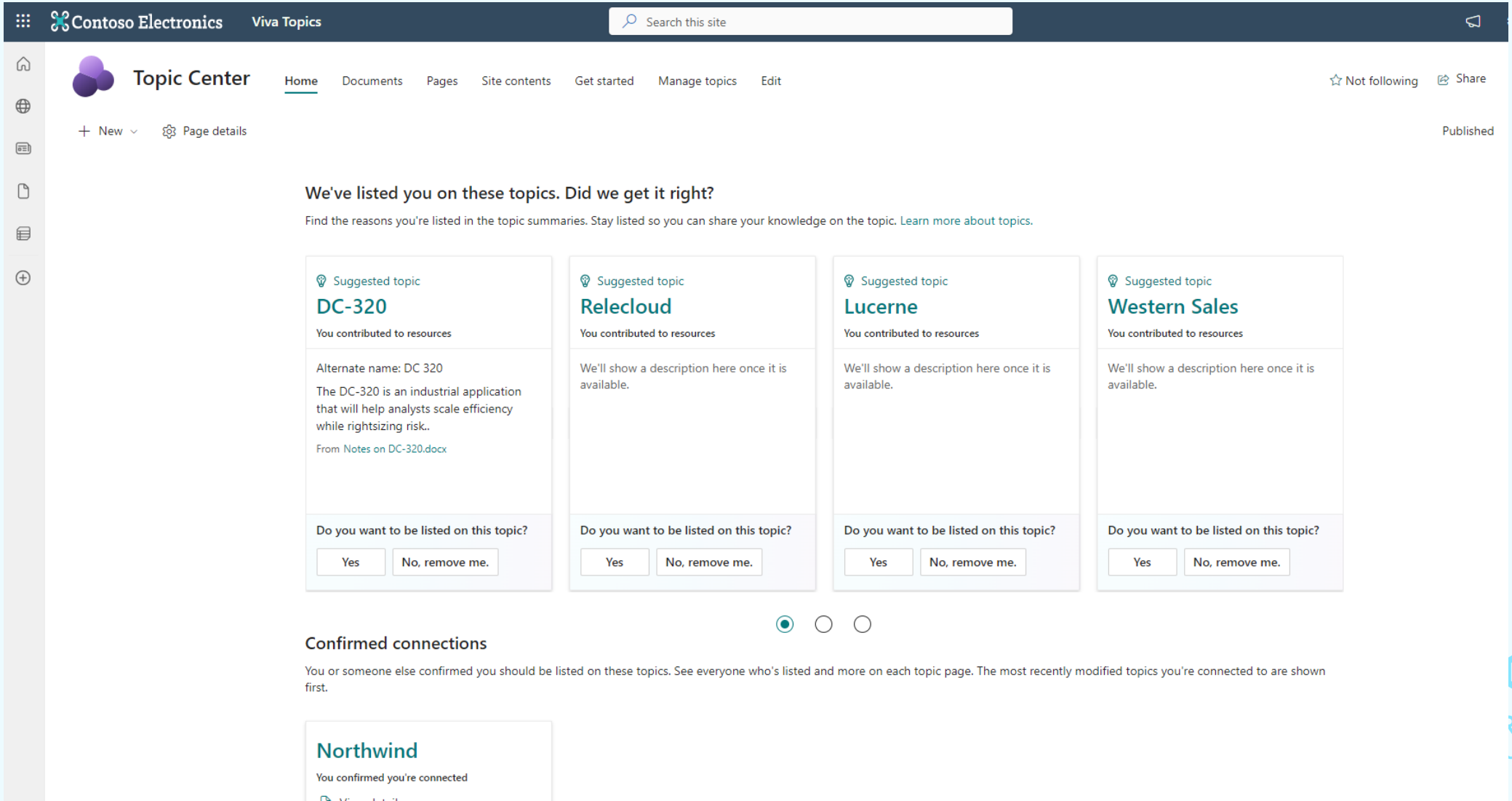
Topic Center



Viva Topics – common scenarios

Improve access to project/product knowledge
Manage a product or service portfolio

Job/role onboarding
Informal, or in-context training

Expertise identification
Customer issues and associated expertise
Sales enablement through accessing latest content

Make tacit knowledge explicit
Competitive intelligence for innovation

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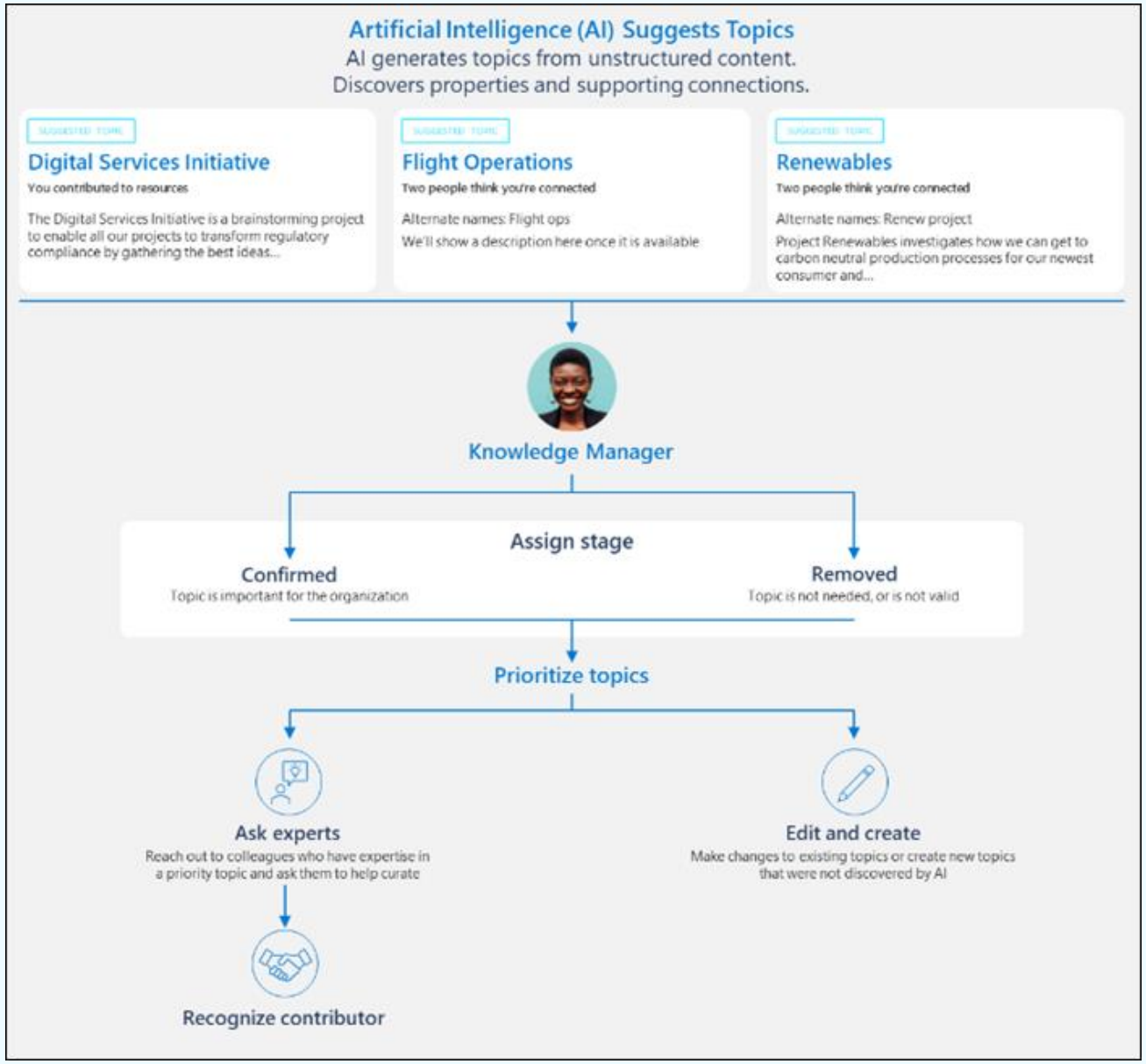
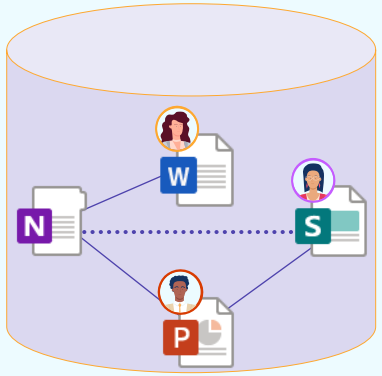
Involve knowledge curators / managers

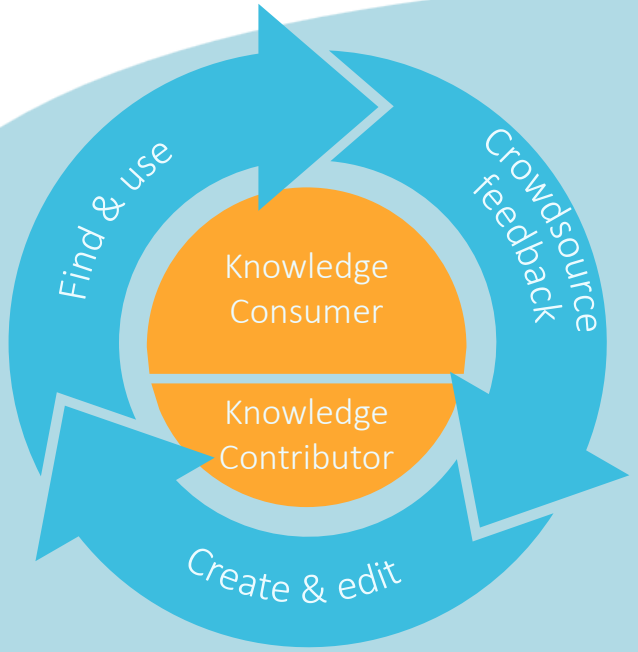


Build a knowledge base over time

1 **Bootstrap your organization's knowledge base** by using the artificial intelligence in Viva Topics on your data



2 **Build knowledge networks** that bring together groups of interconnected contributors and consumers



Provide immediate value for users by assembling the organizational knowledge base with AI suggested topics

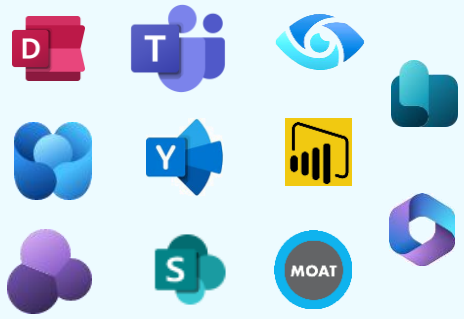
Increase the value of Viva Topics by activating more experts to contribute their knowledge

Value

Time

Next steps/summary

Microsoft 365 Can Be Used as a Knowledge Platform



Technology

Thoughtfully Implemented

User and Learning Centric

Supported by Important Roles and key internal partnerships

Yields Business Results

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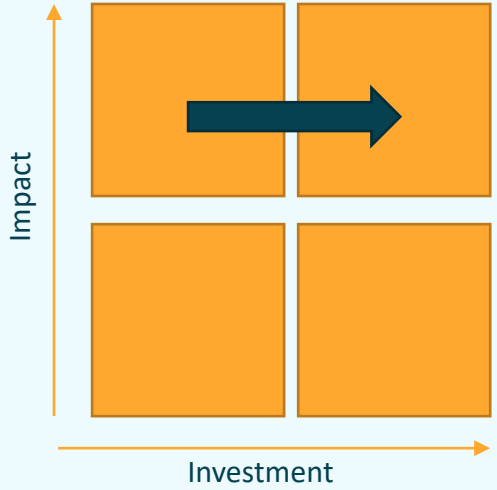
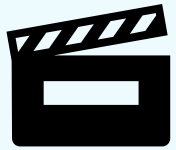
Take a knowledge and learning based approach

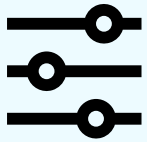
Uncover “pain points” and opportunities SPECIFIC to your organization



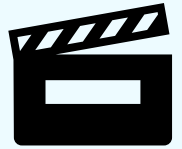
Order your actions



Act and reflect on experience, share successes



Make changes based on lessons learned



Take next action, rinse and repeat

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Questions?

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