Creating a People-Centric Company with Office 365

5 Steps for Transformation Success

LISTEN
UNDERSTAND
KNOW
CONNECT

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A Tale of Two Cities

1850’s: Chicago installs first comprehensive sewage system in US.

1915: Baltimore is the last US city to install a comprehensive sewage system.
Meet Your Presenter

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84% of Digital Workplace Projects Fail

Forbes
People-first projects are different from legacy, task-first, projects.
5 PRINCIPLES FOR PEOPLE-CENTRIC TRANSFORMATION
Average number of applications that an employee uses per week
Employee Satisfaction

- 2 or Fewer Enterprise Systems: 87%
- 3 or More Enterprise Systems: 72%
LISTEN

Modern Channels

Legacy Channels

Evolving Channels

Listen in More Places

Chat/IM

Big Data

IoT

Bots

PC

Meeting

Paper

Mail

E-mail

Sales

File Share

Sales

Point of Sale

Customer Care

IVR

Public Web

Instant Message

Mobile

Text/SMS

Social

Portal: Intranet, Extranet

Cloud

Video

Public Web

Meeting

Legacy Channels

Modern Channels

Evolving Channels
Remember in Fewer
Integrate, Migrate and Eliminate
3 Year Journey – Community/Regional Bank

- 153 Business Processes
  - Loan Paperwork, Approvals, Pipelines, Onboarding, Referrals, Compliance
- Results
  - Lower Operational Costs
  - Better Customer Acquisition & Retention
  - Less Re-Keying, Higher Data Quality
- Next Step
  - Use MS Teams for Examinations
ORGANIZATIONS WITH THE FASTEST REVENUE GROWTH ARE:

Better at accessing and drawing insights from data. **108%**

Better at translating insights into action. **84%**

- IBM Research
2025
175zb

2016
4.4zb

2006
0.16zb

53% - 80% ROTII
Who is your data steward?
Be Social

LISTEN

UNDERSTAND

 Executives
 Set Direction

 Management
 Multiple Tiers

 Operations and
 Front Lines

 Distributors

 Customers

Surveys
 Annual customer and employee feedback

Key benefits of Enterprise Social:

- 86% Better employee collaboration
- 84% Better information sharing
- 82% Transform company to embrace & leverage modernity
- 78% Capturing and sharing ideas and content expressed and created by staff
- 78% More engaged and satisfied employees

TOP 5 BENEFITS FOR INTERNAL USE

SENTIMENT

Positive Neutral Negative

5.1 index 0.7 change
30% greater profit for firms using sales process.
- The Sales Management Association

Employees with above average number of connections generate $83,000 more revenue.
- MIT Research

Marketers who use process report success 466% more often than those who don’t.
- Coschedule

72% of first BPM projects generate a return within 2 years; faster with additional projects.
- AIIM
Governance and Innovation can Co-Exist
Rigid Core

Reinvent How You Think About Process

Flexible Edges
CRM + SP + PowerApp

Flow
- Select Template
- Mail/Merge Variables

Dashboard
- Formatted SharePoint List
- Approval Status

Process

Connect

Reinvent

Understand

Listen
Organizations with a strong learning and collaborative culture are:

- 92% more likely to develop novel products and processes
- 52% more productive
- 56% more likely to be first to market with their products and services
- 17% more profitable than their peers
Business Leaders

86%
“Collaboration is critical.”

7%
“We are effective at collaboration.”

79%
Gap!

- Boundary Spanning Leadership
“Employees engage when they can improve the customer experience.”

— The LUCK Principle
KNOW YOUR SQAG
Good LUCK
Character driven leaders and their teams deliver as much as 5x greater returns for their organizations.

- Return on Character

The boost in margins that can be explained by creating an effective culture.

- The Culture Cycle

The boost in operating profit performance for customer-facing employees that can be explained by culture.

- The Culture Cycle
81% of organizations are weak in Digital Management, Digital Leadership or both. Of the 19% that are strong in both – they are more likely to show:

- Revenue growth of > 10%
- Presence of a digital coach
- A clear digital vision

Harvard Business Review
2.7 MILLION CHILDREN WITH A PARENT IN PRISON

HAVE NOT SEEN THEIR CHILDREN

Isis González
BEFORE
• Stale, Failed, Intranet

AFTER
• Digital = Cultural Tool
• CEO Blog and Engagement
• Active Newsfeed
• Content Owners and Editor
• Social Employee Recognition
• Document Governance
Listen to people and remember what they say.

Distribute and analyze knowledge to discover insights.

People-centric processes and experiences.

Know, share and improve the score together.

#Leadership #Culture #Purpose #Why – Use digital workplace tools to create a more people-centric LUCK-based culture.
"Profit is the pulse of the organization, people are the heart."

— The LUCK Principle
Resources

C5insight

Dynamics 365 and Office 365 Implementation and Advisory Services

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The LUCK Principle
Grab a Copy of the Book on Amazon!

www.gotluck.link/book

• eBook: Digital Workplace ROI
• eBook: LUCK Infographics

Engage with C5 Insight

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