



DELIVERING REMOTE WORKFORCE PRODUCTIVITY

*How to use data and analytics to better understand
workforce productivity and collaboration patterns*

FINANCIAL SERVICES COMPANIES (SUDDENLY) FACE A NEW IMMERSIVE OPERATING ENVIRONMENT.

OUR PERSPECTIVE

- **Workforces will likely operate in an increasingly remote fashion, even beyond the current crisis.**
- **By combining data from tools used by employees daily**, companies can better understand the efficiency and effectiveness of workforces working both on-site and remotely.
- A data-driven approach allows companies to **recognize collaboration patterns as well as monitor trends on an ongoing basis**, thereby achieving discreet insights prior to, during, and following disruption events.
- Data-driven insights **uncover gaps, trends, and opportunities**:
 - Illuminate areas at risk for productivity gaps relative to workforce productivity in a traditional model.
 - Help managers identify areas that may need support, guidance, coaching, and direction before problems emerge.
- **Areas of opportunity** for a data-driven approach include:
 - Prioritize projects and investments
 - Identify process inefficiencies and bottlenecks
 - Understand “hotspots” in collaboration networks
 - Evaluate workforce capacity
 - Gauge wellness / well-being
 - Strengthen continuity and resiliency planning and processes
 - Drive revenue increases and cost reductions

BENEFITS OF A DATA-DRIVEN APPROACH

Holistic Approach to Monitoring Productivity

- Productivity can be measured at a point in time and monitored over time (in discreet increments).
- Organizations with any level of complexity (products, roles, office locations, etc.) can benefit.

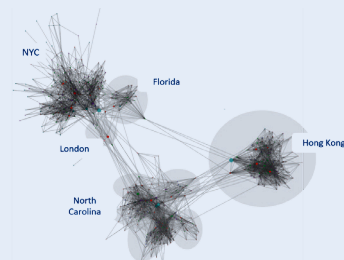
Quick & Valuable Insights

- Data insights achievable within weeks, if not days.
- Unobtrusive & inexpensive to implement.
- Cost to introduce is low, and can generate a sizable ROI.
- Implementation achieved with modest organizational impact.

Limited Technology Resource Demand

- Implementation simply entails uploading an organizational data file and enabling licenses (as appropriate).
- Modest need for ongoing technology resources after initial implementation.

Illustrative Collaboration Analysis: Do You Know How Your Employees Interact?





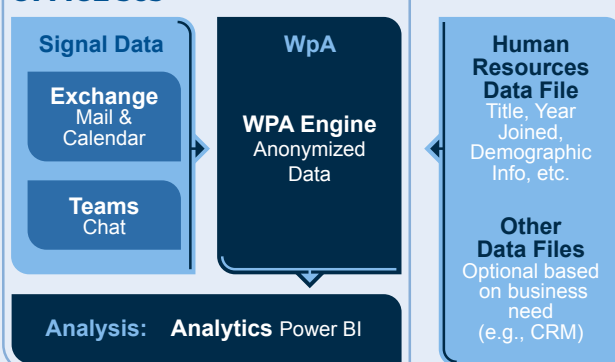
EXECUTION STRATEGY

Companies can **aggregate anonymized data and analytical insights** provided from a host of organizational behavior tools to **assess, enhance, measure, and manage the productivity and effectiveness** of their workforce:

- Microsoft's Workplace Analytics (WpA) & Organizational Network Analysis
- Calendar
- E-mail
- Instant Messaging / Chats
- Documents
- Human Resource Data
- Client Relationship Management
- Other productivity tools

SAMPLE DATA ARCHITECTURE USING WPA

OFFICE 365*



* Implementation is most effective in an Office 365 environment



BEHAVIORAL DATA

Aggregate behavioral data from everyday work



ORGANIZATIONAL CONTEXT

Map behavioral data to organizational attributes (e.g., HR data) to reveal collaboration patterns



BUSINESS OUTCOMES

Incorporate additional data sources (e.g., CRM) to connect collaboration to business outcomes



ACTIONABLE INSIGHTS

Achieve powerful insights to measure & monitor the productivity of a remote workforce to generate better business decisions

THE VISION

As the operating model for financial services companies continues to rapidly evolve, these companies can adapt by incorporating data and analytical tools using existing behavioral data. This approach results in a holistic understanding of what ultimately drives the performance and productivity of an increasingly remote workforce.



ABOUT REFERENCE POINT

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