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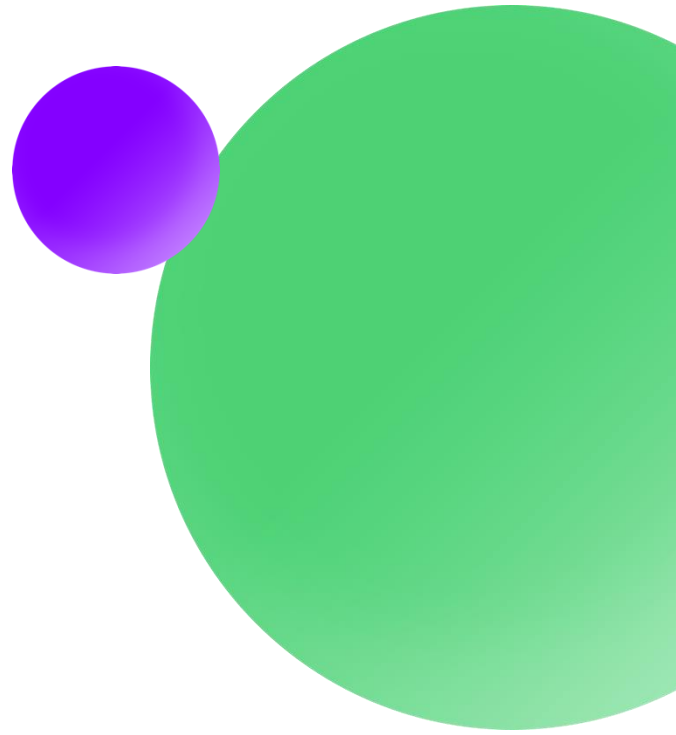
Service Description Digital Vitality

wortell

Work

Service Description

Table of contents

1 Introduction

1.1 Constantly in motion

Microsoft 365 is a Microsoft service that is constantly in motion. We are therefore constantly adapting our services to the services of Microsoft 365. As a result, we may have to adjust our service description during the period that we provide our services to you. Our starting point is that we will always offer a service that remains at least the same or offers the same experience.

2 Digital Vitality

Digital Vitality ensures that your employees **enjoy** using the technology you deploy, know **how to** use it and want to **continue** doing so. The principles and methodology of Digital Vitality are described below.

2.1 Digital Vitalityis a process

Because knowledge is always expanding, products are being developed and ways of working are being adapted, the adoption of a working environment is never finished. That's exactly why Digital Vitality is a process. A process that guides the change and puts the employee first.

Digital Vitality Process consists of a number of components:
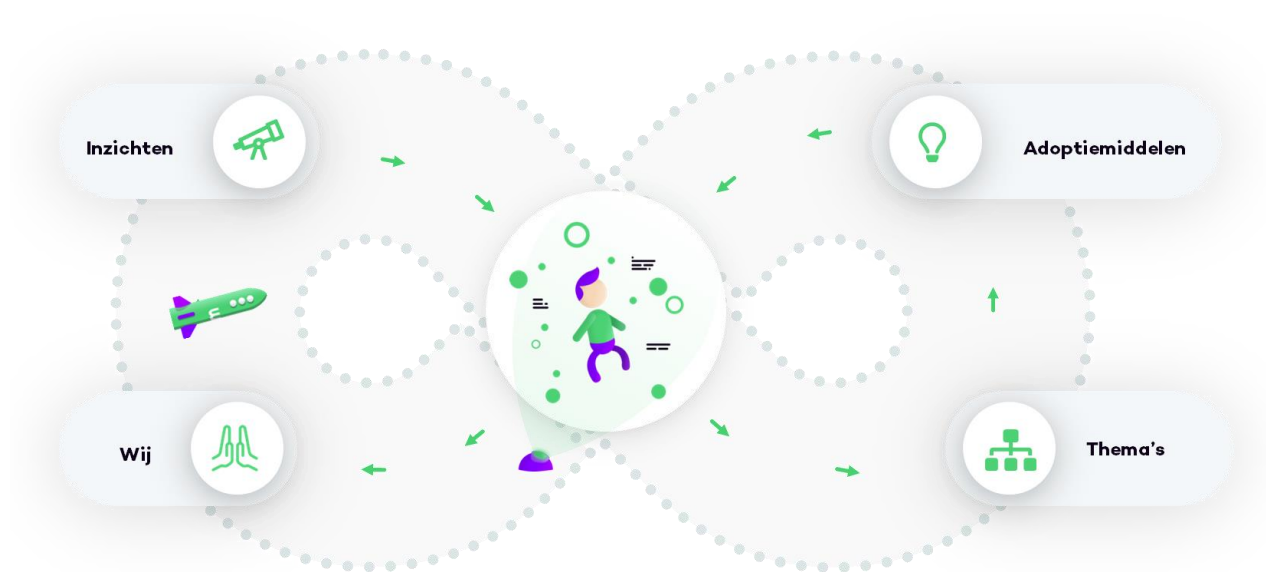
- We - the adoption team and Wortell who coordinate the change
- Insights - the dashboard with experience figures around the change
- Employees - personas that experience the change
- Themes and Scenarios - a breakdown of technology
- Adoption means - means to make the change happen

2.2 Guiding instead of taking over

The Digital Vitality process is guided by an adoption consultant. Our goal is to guide the change and not to take over the entire process. This ensures that your organisation understands and knows how the approach works.

This applies to Digital Vitality, but the approach also works for other changes in your organisation. You are free to use the approach for other changes as well.

Digitally Vitality is focused on increasing adoption of technology tools from Microsoft 365 and Office365. To make the separation clear below are some of the things we don't do from Digital Vitality.

What we don't do:

- Providing technical advice
- Data migrations
- Setting up Microsoft 365/Office365

Because an organisations needs sometimes exceed what is offered by Digital Vitality, a number of extensions are possible. These extensions are offered separately and on a chargeable basis.

Extensions

- Change Management
- Customized Themes and/or Scenarios
- Different scenarios within one of the existing themes

One-off activities are carried out for the setup of Digital Vitality. These are described in an SOW and are not described in this Service Description.

3 We

By 'We' we mean the Adoption Team and they ensure that the process keeps running. They make the right choices in the process, based on the given insights. The adoption team consists of both members from the client organisation and (an) employee(s) from Wortell.

The following roles are minimally, represented in this:

- Primary sponsor
- Project Manager
- Persona representatives
- IT representative
- Communications Officer
- HR Officer
- Adoption Consultant (Wortell)

This team was put together during the start-up phase leading up to the launch of Digital Vitality.

3.1 What does Wortell do and deliver?

- Support with issues related to the adoption process
- Support in implementing the adoption process
- Preside over the monthly progress meeting of the adoption team
- Guidance in implementing the communication plan
- Providing input for the preparation of communication messages based on the communication plan
- Introduce in monthly meeting and discuss progress based on adoption dashboard
- Advise on progress and propose possible changes based on progress

3.2 What do you do?

- You will ensure that team members are available as adopters
- Planning and organizing meetings
- Determining deviating scenarios
- Drafting and sending communication
- Maintain and monitor planning
- Control of own organisation

3.3 What doesn't Wortell do?

- Making and keeping track of planning
- Inviting the participants

3.4 Added value

- The team has an active role in making sure adoption gets attention

- The team knows what the organization wants to achieve with the change and has focus on the change
- The adoption team determines the order of the themes and the interpretation of these scenarios.
- The members of the team are also employees and know what is going on in the organisation. Therefore they can determine what is important like no other

4 Insights

We gather insights during the execution of the work. These insights ensure that the adoption team keeps a grip on progress by gaining insight into usage figures in Microsoft 365 as well as the general mood of the employees.

These insights come from:

- experiences of ambassadors
- employee experiences
- results from the adoption dashboard

4.1 What does Wortell do and deliver?

- Deliver survey model for sending out the survey among the employees
- Model for processing and interpreting survey data
- Advice on progress and implementation of Themes and Scenarios
- Giving advice based on the measurements from the adoption dashboard
- Together with the adoption team, the correct order of theme and scenarios is determined

4.2 What do you do?

- Get insight in the usage figures of the new tooling from the Microsoft 365 adoption dashboard and send it to the consultant at Wortell
- Getting the agreement to collect opinions from employees
- Collection of data

4.3 What Wortell doesn't do

- Delivering the Power BI License for reading out the dashboard

4.4 Added value

- Prioritising the right themes and scenarios
- You do what is best for the organization
- Making clear what you are going to do and why you are going to do it
- Break down technology into small pieces so that adoption becomes manageable.

5 Themes and Scenarios

With Digital Vitality, we've broken down the technology, applications and tools into small logical parts. In Digital Vitality these are called themes & scenarios. A theme has several scenarios, and with these themes & scenarios we translate the technology into understandable language. This makes the technology easier to adopt for the employee.

Digital Vitality currently has 9 themes;

- Getting started with the online workplace
- Online collaboration meetings
- Search and find
- Personally productive
- Creating insight
- Knowledge and organisation
- Safe working
- Digital Wellbeing
- Education

5.1 What does Wortell do and deliver?

- Delivers an overview of all themes & scenarios at the start of the collaboration
- A description of the themes including
    - o Purpose of the theme
    - o Attitude and behavior
    - o Milestones
    - o A description of the theme
    - o To whom the theme applies
    - o What you're not going to do anymore/what you're saying goodbye to
- Description of the scenarios including:
    - o Agreements and rules that go with it
    - o What does this scenario mean for me as an employee
    - o What needs to be facilitated before commencement
    - o The underlying Microsoft 365 apps and/or tools to be used
    - o What you're not going to do anymore/what you're saying goodbye to
- Overview of knowledge components per scenario (for knowledge transfer purposes)

5.2 What do you do?

- Providing input for a first interpretation of the Themes & Scenarios (result of the workshops Get to Work and Verify and Fine-tune)

- Determine the order of the themes and the content of these scenarios (result of the workshops Get to Work and Verify and Fine-tune)
- Fill in different scenarios if applicable
- Content knowledge for different scenarios

5.3 What Wortell doesn't do

- Software used by the client that is not part of Microsoft 365 are excluded as part of the get scenario/theme (can be customized for additional work)
- The rollout of two or more new themes at the same time
- Creation of custom themes and scenarios (at additional cost)

5.4 Added value

- With themes & scenarios, the huge mountain of technology is broken down into small manageable pieces, making it easy for the employee to change.
- It provides a balance between technology and adoption during implementation.
- Employees know what they can expect from the change (and what not)

6 Adoption tools

An adoption tool is a product that supports the employee in adopting the technology. The tools are used at different times in Digital Vitality.

Some of these adoption tools are freely applicable, which means that not all of them need to be used. This means that Digital Vitality offers the possibility of using those resources that have the greatest effect on the adoption of the change. These are the adoption tools.

- Jim
- Ambassadors
- Ambassador training
- Ambassadors theme training
- Classroom training
- Knowledge café
- Walk-in consultancy

- Feedback
- Insights - adoption traffic light
- Awareness video
- Management Awareness session
- Communication plan
- Adoption expert

bijlage IINotes Adoption funds explains the adoption resources.

6.1 What does Wortell do and deliver?

- At the start of the cooperation, supplying the overview of adoption resources
- Advice on the use of adoption resources per theme and scenario

6.2 What do you do?

- Determine which adoption tools fit the organization

6.3 What Wortell doesn't do

- Use other means of adoption than those described in Annex II (but possible at extra cost)
- Creation of customised material (possible at extra cost)
- Converting training material to the customer's house style (possible at extra cost)

6.4 Added value

- Large variety of resources that:
  - Alignment with the various teams and target groups
  - Connecting to the moment and the situation
  - Connecting to different learning needs
  - To be deployed at different times
  - Suitable for different levels

bijlage I   Explanation of themes

Getting started with my new digital workplace

This theme ensures that employees start working with the new workplace and has 2 scenarios.

This theme ensures that employees can continue to work as they did immediately after the rollout of new hardware. After the hardware has been rolled out, which is usually an entire logistics operation, the first changes become visible. People start using the apps and/or data in Microsoft 365. A practical example is the use of e-mail and Microsoft Teams without having to log in.

The scenarios in this theme are;

- Getting started with my new PC
- Getting started with my Cloud workplace

Online collaboration and meeting

With this theme, employees will start using the digital collaboration environment such as Microsoft Teams. Scenarios in this theme are:

- Start with online collaboration
- Online meetings
- Collaborating on files
    - With colleagues
    - With external parties
- Working together on action points
- Collaborating on notes

Personally productive

The theme personally productive relates to the various facets of the Cloud workplace that relate to the person. This is where efficiency is gained in particular. The scenarios are:

- Basic skills - Ow, that's how it works!
- Getting started with Jim - my personal digital assistant
- My personal files in one place
- Overview of my day and tasks
- Schedule a meeting
- My notes in one place

Knowledge and organisation

This theme is mainly about the correct placement and sharing of knowledge/information in the organisation. This ensures that employees share knowledge/information in the right place and are able to find it again.

- Where to put my files in the Cloud

- How do I share information and knowledge in the organisation?

- How to share knowledge with a team

- Communicating in the right place

- Company-wide presentations

- My home page

- On- & off boarding of staff

- Who am I and how do I find expertise

Search and find

Within organizations there is an enormous amount of knowledge and information available. Unfortunately, it is not yet so easy to find it quickly when you need it. The average employee spends about 1 hour a day searching for relevant documents, colleagues*. In this theme we will work with scenarios that will help our organization to do this in a smarter way.

- Access your files anywhere

- Find files easily

- Sharing files correctly

- How to find knowledge

- Consult agendas

- Is there room for me in the office

Creating insight

Creating insight gives insight into the working environment of the employee. It's about having an overview of issues related to team and business processes so that action can be taken efficiently and decisively. We look at the questions: how can we ensure that our data is also transparent to the entire organization? Reports, figures, lists, how can we create these efficiently and share them in the right way.

- Gaining insight in how time is spent

- Retrieve opinion from the organization

- List, lists, lists - shareable lists and overviews

- Anytime, anywhere

- Create and publish reports

- Automate actions - power to the apps

- From data to information - from numbers to overview

Safe working

Of course we do not skip the topic of working safely with a Cloud workplace. However, this theme is rarely a stand-alone issue and the scenarios are therefore often applied when another theme/scenario is involved. A good example is the use of personal devices. The

scenario 'separate business and private' is then also applied when adapting the secur policy for business data.

With the theme of working safely, employees become aware of the safety risks, working safely in the Cloud and they become familiar with the safety measures that are applied in your company.

With the theme of working safely, employees become aware of the safety risks, working safely in the Cloud and they become familiar with the safety measures applied in your company.

- One password with Single Sign On (SSO)
- Reporting abnormal behavior
- Aware of digitally safe working
- Forewarned is forearmed.
- Protecting identity
- Protecting crown jewels
- Separating business and private life

Education

In this theme, we look at the following scenarios specifically for (digital) teaching. This scenario is of course specific to education, but it is also relevant if your staff members do a lot of digital teaching. Scenarios in this theme are:

- Teaching online
- Blended learning
- Hybrid teaching
- The well-being of students and teachers
- Organizing events or lectures

bijlage II Notes Adoption funds

The adoption resources are explained below.

Jim

Jim is an app in the menu of Microsoft Teams with the parts "chat", "E-learning" and "profile". Depending on the style of work, the employee will be given a profile. Based on that profile, knowledge material is sent to the employee to make him or her even more digitally proficient.

Jim is always deployed and is therefore a permanent part of Digital Vitality.

What does Wortell do and deliver?

- The platform Jim
- E-learnings
- Extensions to the platform will also be made available to your company
- Installation instructions JIM
- Answering questions if they are about Microsoft 365
- Installation of Jim (if Wortell manages the Microsoft 365 tenant)
- Updates from Jim (if Wortell manages the Microsoft 365 tenant)

What do you do?

- The installation of Jim in the Microsoft 365 tenant (if you are doing the system administration yourself)
- Updates from Jim (if you manage the Microsoft 365 tenant yourself)
- Answering questions posed to Jim that affect your own organization
- Designate the person responsible for Jim from within your organisation

What Wortell doesn't do

- Answering questions to Jim that are not about Microsoft 365
- Answering questions to Jim that are not about one of the Themes and Scenarios

Added value

- A digital database with knowledge articles about Microsoft 365
- Enrichment of employees' knowledge
- Available day and night
- A place where employees can ask their questions
- A method in which all these questions are centrally captured

Ambassadors

Ambassadors are employees of your company who enjoy helping other colleagues. We call them Ambassadors and they are indispensable in Digital Vitality.

They reduce the gap between people and technology so people are more supported. Ambassadors are colleagues who are trained in two areas:

- o Providing support to colleagues. How to do that and how to deal with resistance;
- o Acquiring knowledge so that they can properly support colleagues.

Ambassadors are supported so that they can also share their questions and experiences. They will receive a Power Pack so that they are recognisable as ambassadors.

Ambassadors are always deployed. It is a permanent part of Digital Vitality.

What does Wortell do and deliver?

- Guidelines for recruiting ambassadors
- Training of ambassadors
- Ambassador training
- Ambassadors theme training
- Coaching of the ambassadors

What do you do?

- Recruit ambassadors
- Free up time and money for the ambassadors

What Wortell doesn't do

- Providing your own ambassadors

Added value

- Knowledge is secured within the organisation and not by outsiders
- Help nearby for employees through availability of ambassador(s)
- Improving adoption through feedback from the shop floor to the adoption team
- They can articulate experience in the right way because they can combine knowledge of the digital workplace with expertise in the field

Ambassador training

In this training ambassadors are prepared to be ambassadors. They learn what it is to fulfill the role. There is a specific focus on issues such as knowledge transfer, dealing with difficult questions and/or resistance. They are also told how they can get support.

Ambassadors are supportive of the Digital Vitality adoption process. They are not a helpdesk and they do not take responsibility for people who resist the change.

Ambassador training is always used. It is a fixed part of Digital Vitality.

What does Wortell do and deliver?

- The training material
- The trainer
- Facilitating the session

What do you do?

- Making time available
- Provision of space and facilities
  - Space
  - Beamer
- Inviting ambassadors

What Wortell doesn't do

- -

Added value

- Familiar with the role of ambassador
- Ambassadors know what is expected of them
- Ambassador knows his/her tasks and responsibilities
- Know how to handle certain situations
- Extend own knowledge of supporting colleagues Train in the area of tools
- PowerPack for recognition of ambassadors

Ambassadors theme training

This training is mainly about knowledge transfer around the theme and scenarios. Here we focus on the following three issues:

It is a session organized for Ambassadors only, so Ambassadors can support colleagues well.

Ambassador theme training is always used. It is a fixed part of Digital Vitality.

What does Wortell do and deliver?

- The training material
- The trainer
- Facilitating the session
- Training of the ambassadors on

- o Why is it important that we do this?
- o What is allowed and what is not allowed? (governance if defined)
- o How does the technology from the scenarios work?

What do you do?

- Making time available
- Provision of space and facilities
  - o Space
  - o Beamer
- Inviting ambassadors

What Wortell doesn't do

- -

Added value

- Communicating technological change
- Ambassadors understand the why of the theme
- Be able to actively communicate why the topic is important to your organization
- Know how the technical solution works and carry it out
- Understand the framework within which the technology works and communicate this

Coaching

In coaching, the Ambassadors are specifically supported in their ambassadorship within Digital Vitality. It is an excellent tool to learn from each other and experiences in order to become better.

Depending on the situation, online or on-site sessions are organized. All Ambassadors who have attended the training sessions may participate.

What does Wortell do and deliver?

- Thorough knowledge of products
- Coach
- Facilitating the session

What do you do?

- Making time available
- Provision of space and facilities
  - o Space
  - o Beamer
- Inviting ambassadors

What Wortell doesn't do

- -

Added value

- Ambassadors can contact Wortell's adoption consultant with all their questions about ambassadorship

    o Questions about the theme and scenarios

    o Questions about the why of this change

    o Questions on Governance (if defined)

    o Questions they should ask in a given situation

- Ambassadors are empowered in their role
- Low turnover of ambassadors
- Knowledge is secured in the organisation
- Abnormalities in use are detected in a timely manner
- Adoption team knows what is going on
- Current situations are specifically addressed

PowerPack

The PowerPack is a tool especially for Ambassadors. It helps them to be recognizable as an ambassador.

The PowerPack is not mandatory.

What does Wortell do and deliver?

- This Power Pack includes:
    o A welcome letter
    o A table flag with an ambassador's badge on it
    o A mug with an ambassador's badge on it
    o Ambassador sticker
    o Vitamin W (sweets)
- Sets up a package containing all the products of a PowerPack.
- The PowerPacks are delivered to one address in the Netherlands
- Wortell distributes the PowerPack during the ambassador training

What do you do?

- A room to store the boxes
- Sending to other offices or home address of the ambassador (if required)

What Wortell doesn't do

- PowerPack divided into partial deliveries
- Send to multiple or personal addresses
- Subsequent ordering of PowerPack

Added value

- Recognition and thus better findability of the ambassadors in the organization
- Ambassadors feel supported in their role as ambassador

Classroom training

In the classroom training we transfer knowledge of scenarios. This is done in a 'classroom' group format, based on the principle of 'do-it-yourself'. If there are questions, people are supported directly.

What does Wortell do and deliver?

- Training material in line with Wortell corporate identity
- Adoption consultant for transfer of knowledge (train the trainer)
- Compilation of training material based on Themes & Scenarios
- A training course for trainers (1% of the total number of employees)
- Support of trainers during the execution of a training course
    - Training support is based on 2 (own/hired) trainers per session

What do you do?

- Appointment/hiring of trainers
- Facilitating resources (room, beamers/screen)
- Communication towards employees
- Inviting participants (maximum 15 trainers per session)

What Wortell doesn't do

- Train all employees (is negotiable as a collaborator)
- Personalise training material according to your own corporate identity

Added value

- After the transfer you will have your own training material
- Securing knowledge in the organisation
- Paying according to need and necessity. Not every theme is the same size and the need of an organization and/or theme is different. Therefore, hours for trainers are not included in the price.

Knowledge café

In the knowledge café (knowledge) subjects from the scenarios are briefly explained. It is indicated why it is important and the functionality is shown by means of a demo. It is ideal for employees who like to learn things easily. The knowledge café is based on showing and doing later on directly by yourself.

The knowledge café is characterized by:

- Short sessions
- Informal atmosphere
- Relatively many subjects in a short time
- Free entrance, registration is not necessary
- Relatively little time to ask questions about the topic
- The session is given online or on-site (depending on the situation)

The transfer of knowledge from the adoption consultant to the trainer is included in the price. The use of the trainer is not included in the price. The reason for this is that not all Themes & Scenarios need a knowledge café. Some parts are so small that they are excellent to transfer with other adoption tools.

What does Wortell do and deliver?

- Training material in line with Wortell corporate identity
- Adoption consultant for transfer of knowledge (train the trainers)
- Compilation of knowledge café material based on Themes & Scenarios
- Training of trainers (1% of total staff)
- Support of trainers during the implementation of a knowledge café
  - Training support is based on 2 (own/hired) trainers per session

What do you do?

- Appointment/hiring of trainers
- Facilitating resources (room, beamers/screen)
- Communication towards employees
- Inviting participants

What Wortell doesn't do

- Train all employees (is negotiable as a collaborator)
- Training material personalised according to your own house style

Added value

- After the transfer you will have your own training material
- Securing knowledge

- Paying according to need and necessity. Not every theme is the same size and the need of an organization and/or theme is different. Therefore, hours for trainers are not included in the price.

Walk-in consultancy

During the walk-in consultancy hour, **trainers** and **ambassadors** have the opportunity to ask questions about the theme and scenarios.

Questions are answered briefly and powerfully. It is the tool to use when the knowledge transfer has taken place and there are more in-depth questions on the subject.

Features of the walk-in clinic are:

- Employees are free to walk in…. and go out as they please
- If the need decreases, then the duration and frequency of the walk-in consultations will also decrease.
- All questions regarding theme and scenario are welcome
- Cases that cannot be answered may be passed on to the helpdesk.

The walk-in is a choice.

What does Wortell do and deliver?

- Adoption consultant to answer questions
- Invitation to participate in the Teams meeting
- Short online sessions (+/- 0,5 hour)
- Identify gaps in knowledge and skills and these are invested in the adoption team.

What do you do?

- Invite participants (trainers and ambassadors)
- Provision of time to participate in the session

What Wortell doesn't do

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Added value

- Securing knowledge
- Employees gain confidence in the use of the tooling
- Gaps in working methods and knowledge become clear and are input for 'Insights'.

Quick Reference Cards (QRC)

QRCs are made available to support employees in the Abil phase.

What does Wortell do and deliver?

- QRCs about the technique in a scenario
- QRC's are set up in the house style of Wortell
- QRCs are delivered in PowerPoint or Word format

What do you do?

- Provide platform for publication of QRCs
- Publish QRCs available on a platform

What Wortell doesn't do

- Create QRCs that are not related to the technology not used in the scenario and not related to Microsoft 365.
- Adapting QRC's corporate identity
- Provide platform for publication of QRCs
- QRC's can be made on request of the customer provided that the knowledge is available and at additional cost.

Added value

- QRCs can be used as a reference work and extra knowledge transfer
- QRCs support the employee in safeguarding knowledge
- QRCs help ambassadors in supporting colleagues

Insights with adoption traffic light

The adoption traffic light gives the adoption team insight on two levels:

1. employee satisfaction with the new technology and the adoption process (soft data)
2. the use of the new technology by means of usage figures (hard data)

By comparing these soft and hard figures, you have a powerful tool to adjust the adoption process.

The installation of adoption dashboard and adoption traffic light is always deployed.

What does Wortell do and deliver?

- Questionnaire tailored to the Themes & Scenarios
- Excel to process the results
- Microsoft Forms as survey tool

- Example questionnaires
- Advice on deviations in use

What do you do?

- Communication towards employees
- Inviting participants and sending out the survey

What Wortell doesn't do

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Added value

- Insight into the degree of adoption
- Distinction between actual use and satisfaction
- Possibil to adjust approach

Awareness Video

With the Awareness video we provide public around a theme and/or scenario(s).

It is a short video in which one of the employees (preferably someone 'with a voice' in relation to the theme) makes the announcement of the Theme/Scenario. It is mainly about why for the company and in general 'What's in it for me'.

What does Wortell do and deliver?

- Input for the content of the movie
- Advice on the content and duration of the film
- Availabil of a recording studio in Gouda

What do you do?

- Create text for the Awareness Video (multilingual if needed)
- Person to narrate the video (more persons if necessary if more than one language is spoken)
- Make time available for the making of the film
- Provision of media channel within the company

What Wortell doesn't do

- Making studio(s) available in other countries than the Netherlands

Added value

- Awareness of the change
- Interpretation by a colleague, so that awareness is high

- High awareness of the change

Management awareness session

In this workshop, management/leadership and senior sponsor are made aware of the change and asked to play a role in supporting adoption of the Theme and Scenarios.

What does Wortell do and deliver?

- Provision of workshop materials
- Adoption consultant who gives the session
- Online or on location (in the Netherlands)
- The workshop is given per theme

What do you do?

- Facilitating resources (room, beamers/screen)
- Communication towards employees
- Inviting the managers/leaders

What Wortell doesn't do

- -

Added value

- Awareness and support for change by management and supervisors.
- Carrying out change

Communication plan

The communication plan provides guidelines for all moments and forms of communication.

What does Wortell do and deliver?

- Model communication plan
    - All aspects of communication for Digital Vitality are described therein
    - describes the moments of communication
    - describes the shape
    - describes the means
- Developed communication approach in line with Digital Vitality
- Advice on the content of the communication

What do you do?

- Communication officer completing the plan

- Communication officer who takes care of the communication from adoption
- Communication messages are drafted and adjusted by the communication specialist from the adoption team so that the message has the right tone-of-voice

What Wortell doesn't do

- Create all communication messages,
- Apply the customer's house style to the document

Added value

- Communication plan with the company's own style
- An approach that leaves room for individual interpretation with regard to content and style
- Recognizable form of communication in your company
- Quick to fill in
- Quick to use
- Connects perfectly with the Digital Vitality approach

Adoption Consultant

The adoption consultant is your point of contact when it comes to implementing adoption. He/she will guide you through the entire Digital Vitality approach. Depending on the scope and tasks, a second adoption consultant can join you.

What does Wortell do and deliver?

- A consultant who knows the Digital Vitality approach
- A discussion partner who is familiar with changes within companies in relation to Microsoft 365.
- A consultant with knowledge of change and knowledge of Microsoft 365
- A good advisor
- A good sounding board

What do you do?

-

What Wortell doesn't do

-

Added value

- Experience with changes using Microsoft 365 and experience with the Digital Vitality approach guarantee a quick start.