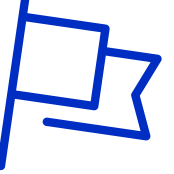# Getting Started with Workgrid

An Intranet Strategy Guide

To Know

To Do

Apps

Ask

Workgrid

# Table of Contents

Workgrid

# Chapter 1:
# What Is Workgrid & How Does It Work?

# Workgrid isn't an intranet.

We only play one on TV.

Just kidding, we really aren't an intranet. We're a digital assistant that integrates with common systems and tools found in the workplace. Workgrid abstracts important tasks and information and delivers personalized and contextual information to each employee in an intelligent, unified experience.

The Workgrid digital assistant is a valuable addition to intranets, driving user engagement by providing capabilities that go beyond delivering the the classic news and information employees expect.

With the Workgrid digital assistant on your intranet, employees will be able to interact more efficiently with enterprise technology. That means less frustration and better productivity for them, and better business results for you.
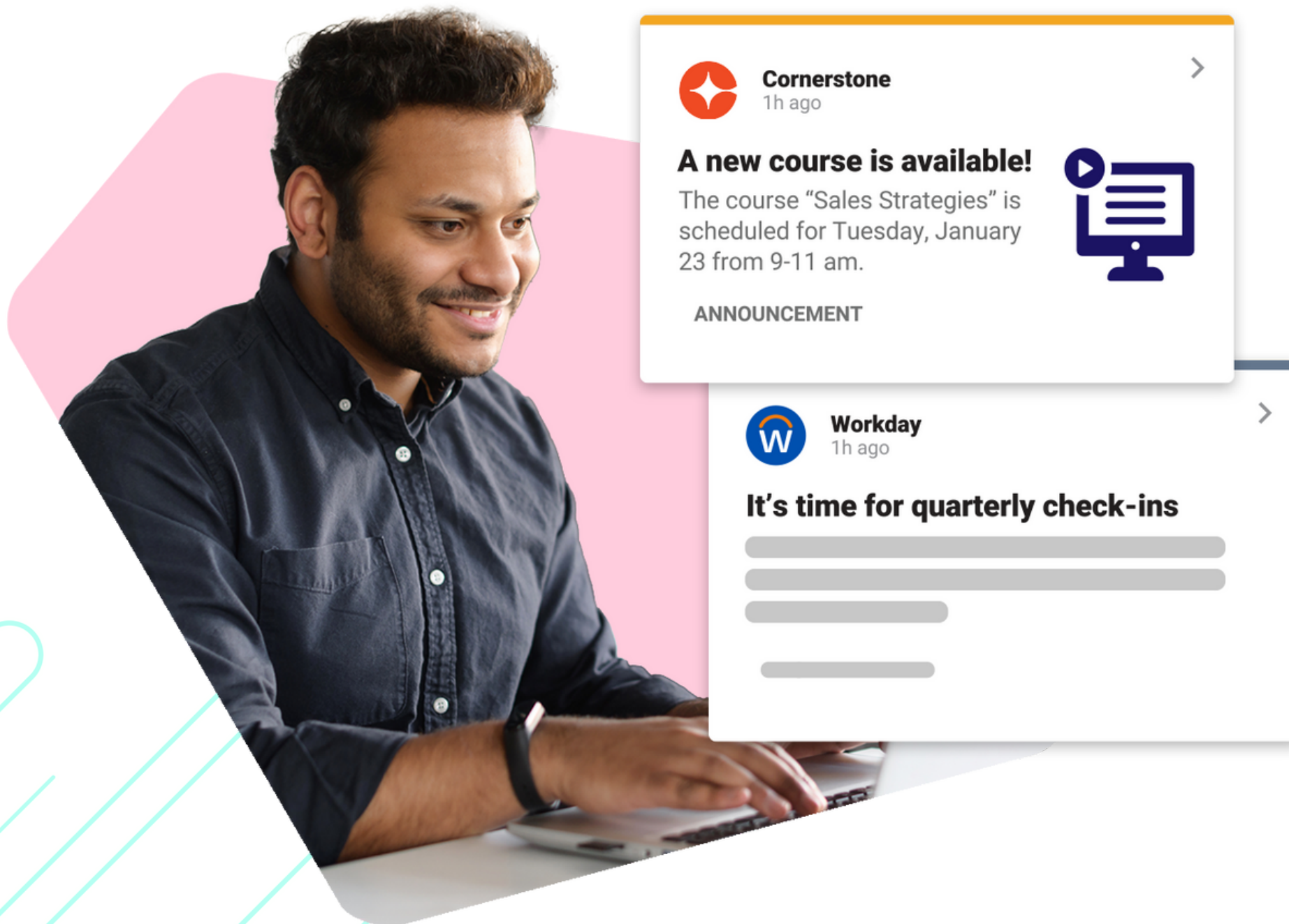
Workgrid

# Workgrid simplifies the work day.

Whether on the intranet or in other available channels, such as a mobile app or within MS Teams, Workgrid puts tasks and information into the flow of work.

Workgrid integrates with enterprise systems to:

- **Deliver personalized employee experiences**, pulling in just the tasks and information employees need.
- **Reduce digital friction** by enabling employees to take action on tasks without logging into source systems.
- **Guide employees' attention** to what matters most, alerting them to what they need to know and do.
- **Make it easier to find information** and manage complex, time-consuming processes.
- **Deliver company communications and news** across the channels where employees work, driving traffic back to the intranet.

---

**Cornerstone**
1h ago

**A new course is available!**
The course "Sales Strategies" is scheduled for Tuesday, January 23 from 9-11 am.

ANNOUNCEMENT

**Workday**
1h ago

**It's time for quarterly check-ins**

Workgrid

# Chapter 2:
# Getting Started With Your Existing Intranet

Workgrid

# It's easy to make your intranet more impactful.

Workgrid integrates with most intranet platforms, so you can use your existing site to deliver a modern, intelligent digital workplace experience.

There are just a handful of easy steps involved in getting started. Here's what you'll set up and manage within your organization ...

- **Assign a Workgrid product lead** who will own the Workgrid platform in your organization.
- **Select and prioritize use cases**. For example, will you focus on approval aggregation or information finding? Which system approvals are most important? What types of knowledge management do you want to improve vs. what type of chatbot knowledge?
- **Collaborate with IT product owners & SMEs.** Make sure your colleagues understand the value of Workgrid so they are open to helping set up your integrations.
- **Plan your launch scope, including the number of initial users,** which segments, departments, and geographies are involved, and which use cases are necessary.

Workgrid

# Workgrid handles the heavy lifting.

Workgrid is dedicated to making sure your project gets off to a good start and is set-up for long-term success. Our customer success team will ...

- **Assign** a dedicated customer success director and solution architect to your company.
- **Build** a continuous maturity plan tailored to your organization.
- **Consult** with you on strategic goals and success criteria.
- **Hold** planning, training, and troubleshooting check-ins at your preferred cadence.
- Continuously **measure** success and **collect** feedback to ensure Workgrid is meeting your organization's goals.

Workgrid

# Tips for success

Your intranet will always be a work in progress - it doesn't have to be perfect or even finished to get started with Workgrid.

No matter where you are in the maturity of your intranet, there are incremental improvements you can make right now that will drive value for employees and set the whole organization up for future success.

- **Don't boil the ocean.** Work at a pace that makes sense for your organization, adding integrations incrementally, enhancing chatbot questions and responses over time, etc.
- **Start with easy-to-implement, impactful use cases** to help you gain traction, then add additional functionality as interest and influence grows.
- **Conduct pulse surveys** along the way to gain insights into employee usage and interest.

Workgrid

# Chapter 3:
# Getting Started With a Workgrid Intranet Partner

# Workgrid can help from the earliest stages of your intranet project.

If you know you want to replace or upgrade your intranet but don't know where to start, you can work with one of our trusted partners to simplify the whole process.

Work with one of Workgrid's intranet partners to benefit from:

- **The experience of two industry-leading organizations** and products with a single implementation framework and seamless product support.
- **Combined onboarding experience**, to ensure alignment on your digital workplace goals.
- **A joint project team** working with your core project team and champions.

*More...*

Workgrid

# Guarantee an intelligent, modern experience that drives user engagement.

*(cont...)*

- **One delivery framework** to meet your implementation goals.
- **Mutual design sessions** to ensure that your digital workplace meets your strategic goals.
- **A streamlined support process** that provides you with a single point of contact after launch.

Plus, you can rest easy knowing that you're building the exact experience you want from the start, with a team of digital workplace experts who are all working together to make sure that the specific needs of your organization are met.

Workgrid

# Chapter 4:
# Project Kick-off Tool Kit

Workgrid

Tool Kit

# Resources to start the project off right

*You* understand why it's so important to create an intranet experience that inspires and empowers employees, but it isn't always so easy to explain to the people who will approve the project.

Here's all the validation you need to make your case ...

- [Checklist] Understanding employee need/mapping out use cases
- [Chart] Establishing business value
- [Chart] Demonstrating ROI
- [Statistics] Quantitative & qualitative benefits
- [Case Studies] Proof to support the business case
- [Reference] Addressing objections

Workgrid

## Checklist:
## Understanding employee need & mapping out use cases

Effectively mapping out use cases for your Workgrid implementation starts by understanding who your employees are and what they need to perform their jobs effectively.

*Remember* - not every use case has to be tackled immediately. Start with the low-hanging fruit, areas where you can make a big difference for employees with relatively little effort.

- **Chart out employee types**, such as customer-facing call center rep, customer-facing field rep, office-based worker, hybrid worker, remote worker, manager, and new employee.
- **Build out persona profiles**. Include their goals, pain points, how they currently used the intranet, etc.
- **Shadow employees to create user journeys**. How do different personas look up information, submit requests, etc.?
- **Build use cases** around these experiences aimed at creating efficiencies for high-volume, low-value tasks. Don't overlook the small delighters! Even something as simple as easily viewing a payslip can make a big difference to employees' experience.

Workgrid

Chart:
# Establishing business value

Help senior leadership understand the value of enhancing your intranet by clearly defining the benefits Workgrid delivers.

| Function | Common Use Cases | Where To Get Started | Business Value |
|---|---|---|---|
| To Know | **Employees:**<br>See personalized, contextual alerts, communications, and information in a single experience alongside tasks.<br><br>**Internal communications:**<br>Send targeted, engaging, just-in-time communications to employees in a channel where they're more likely to be seen.<br><br>**HR:**<br>Send updates for HR-related initiatives to targeted groups of employees based on job function, location, etc.<br><br>**IT:**<br>Send notifications about security updates, policy changes, etc. | • Benefits notifications and policy changes<br>• Upskilling opportunities and job openings<br>• Health and safety procedures related to Covid<br>• Corporate announcements<br>• Office closures<br>• Philanthropy initiatives<br>• Intranet billboards<br>• Earnings reports/company performance<br>• "Did you know" informational messages<br>• Reminders about special corporate events and programs<br>• Welcome messages for new employees<br>• Reminders about annual benefits enrollment, policy changes, etc. | • Better-informed employees<br>• Higher productivity<br>• More effective communications<br>• Increased engagement |

**BONUS:** *This functionality is available throughout the intranet experience, so employees always have the resources they need right at their fingertips.*

To Know

To Do

Apps

Ask

Workgrid

Chart:
# Establishing business value

Help senior leadership understand the value of enhancing your intranet by clearly defining the benefits Workgrid delivers.

| Function | Common Use Cases | Where To Get Started | Business Value |
|---|---|---|---|
| To Do | **Managers:** Process all approvals from a single location, without logging into disparate source systems.<br><br>**Employees:**<br>• Single experience to see everything that needs their attention<br>• Manage work and personal tasks from a central location<br><br>**HR:**<br>• Send notifications about deadlines<br>• Conduct pulse surveys to measure employee sentiment<br><br>**IT:**<br>• Password reset reminders<br>• Conduct pulse surveys to gather feedback on tech resources | • Pulse surveys<br>• Approvals for expenses, procurement, and time-off requests<br>• Onboarding lists | • Manager time savings<br>• Reduced processing time for high-volume, low-value tasks<br>• Better visibility into employee satisfaction and engagement |

**BONUS:** *This functionality is available throughout the intranet experience, so employees always have the resources they need right at their fingertips.*
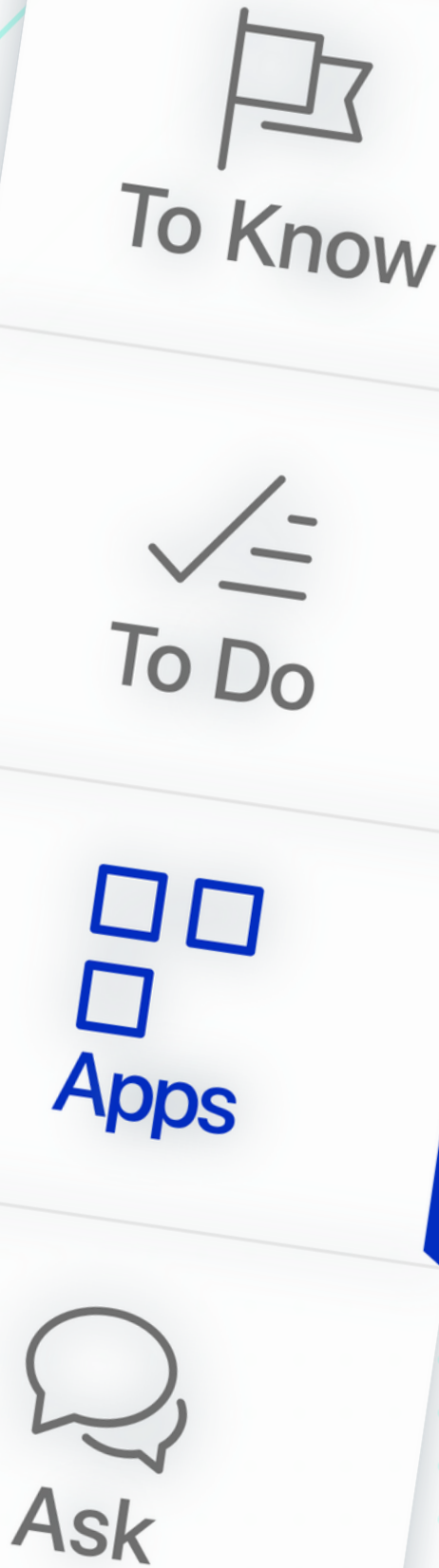
To Know

To Do

Apps

Ask

Workgrid

Chart:
# Establishing business value

Help senior leadership understand the value of enhancing your intranet by clearly defining the benefits Workgrid delivers.

| Function | Common Use Cases | Where To Get Started | Business Value |
|---|---|---|---|
| Microapps | <ul><li>Easy visibility into payroll and time-off balances</li><li>Customer reports and dashboards for role-based functions</li><li>Find profile and contact info for people across the organization</li><li>See snapshots of personnel data, such as designated office, employee type, incentive-plan objectives, and assigned tech assets, with one-click access to make changes</li></ul> | <ul><li>**Payslip app** - delivers instant, secure access to recent payslip information without having to access core finance or HR systems</li><li>**People search app** - offers an easy way to find coworkers across the organization</li><li>**Time off app** - makes it easy to view time off balances and delivers one-click functionality to submit leave requests</li></ul> | <ul><li>Improved productivity</li><li>Increased efficiency</li><li>Reduced stress</li><li>Well-informed employees</li><li>Better decision-making</li><li>Increased engagement</li></ul> |

**BONUS:** *This functionality is available throughout the intranet experience, so employees always have the resources they need right at their fingertips.*

To Know

To Do

Apps

Ask

Workgrid

# Chart:
# **Establishing business value**

Help senior leadership understand the value of enhancing your intranet by clearly defining the benefits Workgrid delivers.

| Function | Common Use Cases | Where To Get Started | Business value |
|---|---|---|---|
| Chatbot | **Employees:**<br>• Get answers to questions wherever and whenever it's convenient, without having to hunt for the information or call a service desk<br>• Submit and manage self-service requests, such as help desk tickets<br><br>**HR:**<br>Make it easy for employees to find the information they need on their own.<br><br>**IT:**<br>Process help-desk tickets quickly and efficiently with less human intervention. | **Pre-packaged Questions**<br>An assortment of ready-made questions and answers is available out-of-the-box, so you can get up and running with a chatbot on the very first day.<br><br>**Q&A Builder**<br>An easy-to-use interface makes training your chatbot to respond to employees' commonly asked questions easy, without help from developers, no coding experience necessary!<br><br>**Small Talk**<br>Enhance the user experience of your chatbot with small talk. The Workgrid chatbot comes ready with a variety of small-talk interactions, including greetings and thank you responses. | • Increased productivity for employees<br>• Better employee satisfaction<br>• More time for HR to focus on strategic work<br>• Decreased ITSM costs |

**BONUS:** *This functionality is available throughout the intranet experience, so employees always have the resources they need right at their fingertips.*

Workgrid

# Demonstrating ROI

Demonstrate the tangible and intangible returns that an intranet enhanced with Workgrid delivers to the business and employees.

# Productivity Increase and Time Savings

| Use Case | Calculation | Annualized Value | | |
|---|---|---|---|---|
| **Approval Time Savings** Significant time savings per transaction to action approvals (login and clicks) | 150,992 approvals * 45 seconds saved/ approval | **More than 1,887 hours saved** | | **90%** adoption by managers performing approvals in digital assistant vs native system. |
| **Approval $$ Savings** Reduce time managers spend on approvals | 113,244 minutes saved * avg employee rate of .66/minute | **$74,741** | | **5** minutes saved on average per week per employee. Significant savings in reclaimed productivity. |
| **Notifications $$ Savings** Move notifications outside of email and time spent searching | 5 minutes/week* 10K employees * avg employee rate of .66/ minute | **$33,000** | | **70%** Reduction in number of clicks required for employees to obtain key information. |

*Estimates calculated using real customer data adjusted for an organization size of 10,000 employees.*

Workgrid

Chart:
## Demonstrating ROI
Demonstrate the tangible and intangible returns that an intranet enhanced with Workgrid delivers to the business and employees.

# Operational Efficiencies

| Objective | Prior | Chatbot | Business Value | |
|---|---|---|---|---|
| Reduce Average Handling Time (AHT) | 15 Minutes | 2 Minutes | **93%** | Expense reduction per help desk transaction |
| Reduce Average Speed of Answer (ASA) | 142 Seconds | 0 Seconds | **2 FTE** | Capacity savings annualize* |
| Convert 5% of mobile help desk call volume to chatbot | 0 | 18% | **$222,250** | Projected annualized savings* |
| Increase Satisfaction (eNPS) | 9 | 10 | **10%** | Increase in employee satisfaction |

*Annualized savings/capacity calculated at a 50% adoption rate based on average mobile calls per year and average salary data.*

Workgrid

Chart:
# Demonstrating ROI

Demonstrate the tangible and intangible returns an intranet enhanced with Workgrid delivers to the business and employees.

## 40% Increase in Engagement
40% increase in internal communications click-through rates. Employees stay engaged and no longer miss important communications.

## Increase Employee Satisfaction and eNPS
A personal assistant makes each employee feel more valued, eases their workload, and improves internal culture and brand perception.

## Amplify adoption and value of existing investments.
Workgrid makes it easier to use systems and transact with the technology already in place.

## Reduce change management costs and improves business agility.
An employee experience layer provides a buffer between user experience and the core source systems, enabling frictionless system migration and consolidation while reducing change management efforts.

Workgrid

Statistics:

# Quantitative & qualitative benefits

Workgrid delivers impactful benefits to organizations of all sizes. Based on their experiences, here are examples of the kinds of results your business can expect by enhancing your intranet with a digital assistant.

## Quantitative

**90% Reduction in Tier I Help & Support** The majority of first call incidents can be deflected with the use of Digital Assistant and self-help.

**70% Faster Manager Approvals** Enhanced approval process for expense management, procurement, and time-off requests.

**Improved Expense Handling** Workgrid has shown a 93% Improvement of expense processing for Fortune 100 organizations.

**70% Fewer Click Throughs**
Help employees stay on task by reducing the amount of time to hunt, access, key systems and information.

**10x Faster Integration Development**
Reduce the time to create Digital Workplace integrations and experiences – from months to hours - with Workgrid's no-code integration engine.

**90% Adoption Rate**
90% adoption of first line managers and above. Where ~80% of transactions and approvals were handled via Workgrid rather than backend systems.

## Qualitative

**Streamlined Business Processes**
Cut the time spent on completing redundant tasks with the use of automated workflows.

**Improved Adoption of Existing Tools**
Increase usage of existing tools to deliver better experiences.

**Increased Productivity**
Less time spent app hopping, context switching, and more time spent on meaningful work that drives business value.

**Fewer Interruptions and Distractions**
Streamline employee-to-system interactions by weaving unstructured backend tasks and workflows into the employee's day.

**Decreased IT Support Cost**
Employees can get answers and support on the most common questions, actions, and support – without the need of engaging the internal service desk.
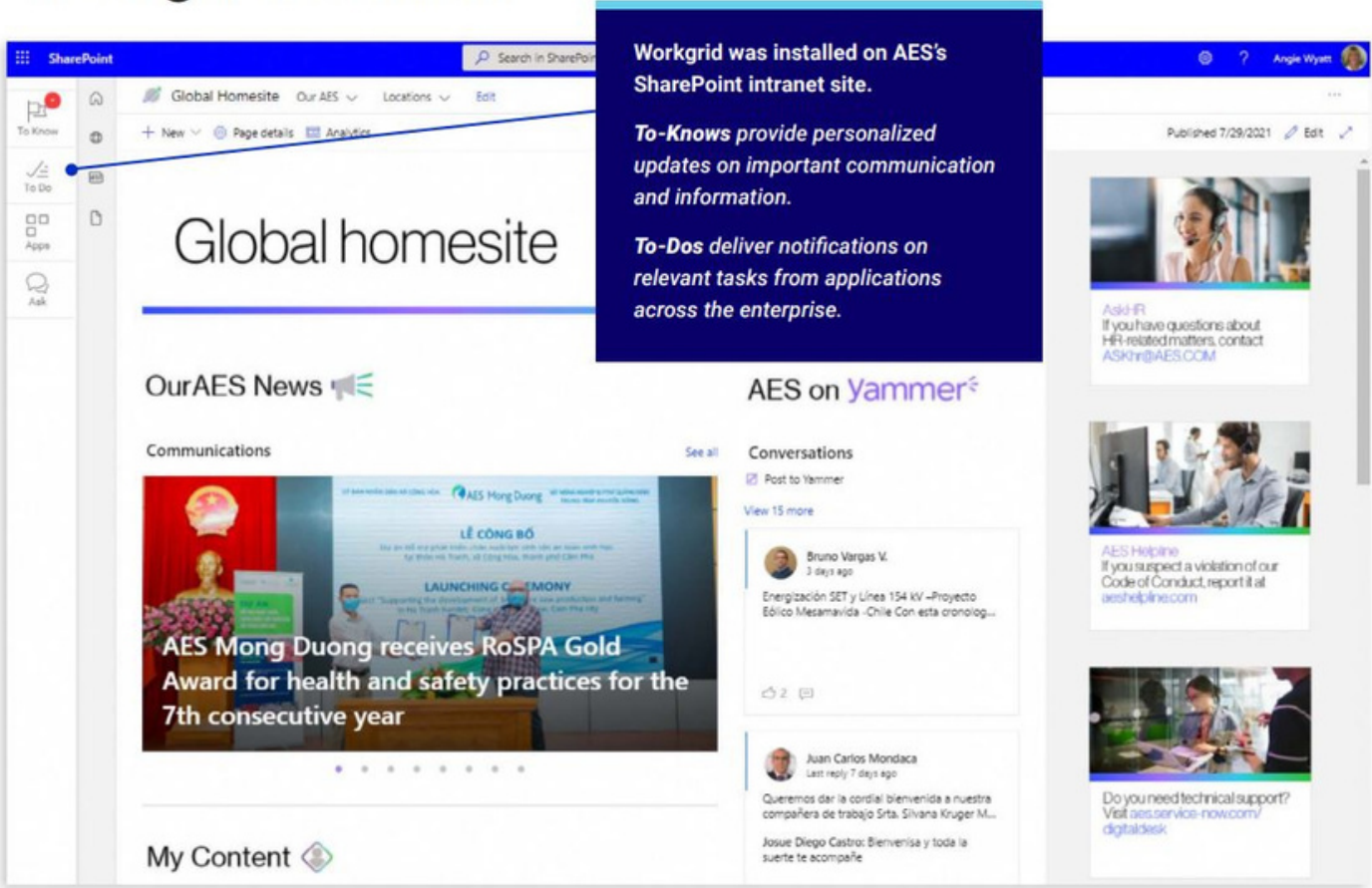
**Enhanced Customer Experience**
Frontline workers have easy, just-in-time access to the information they need so they can provide the highest levels of service to customers.

**Better Resilience for System Migrations**
Eliminate the pain and impact of back-end application changes by abstracting employees from the experience of individual systems.

Workgrid

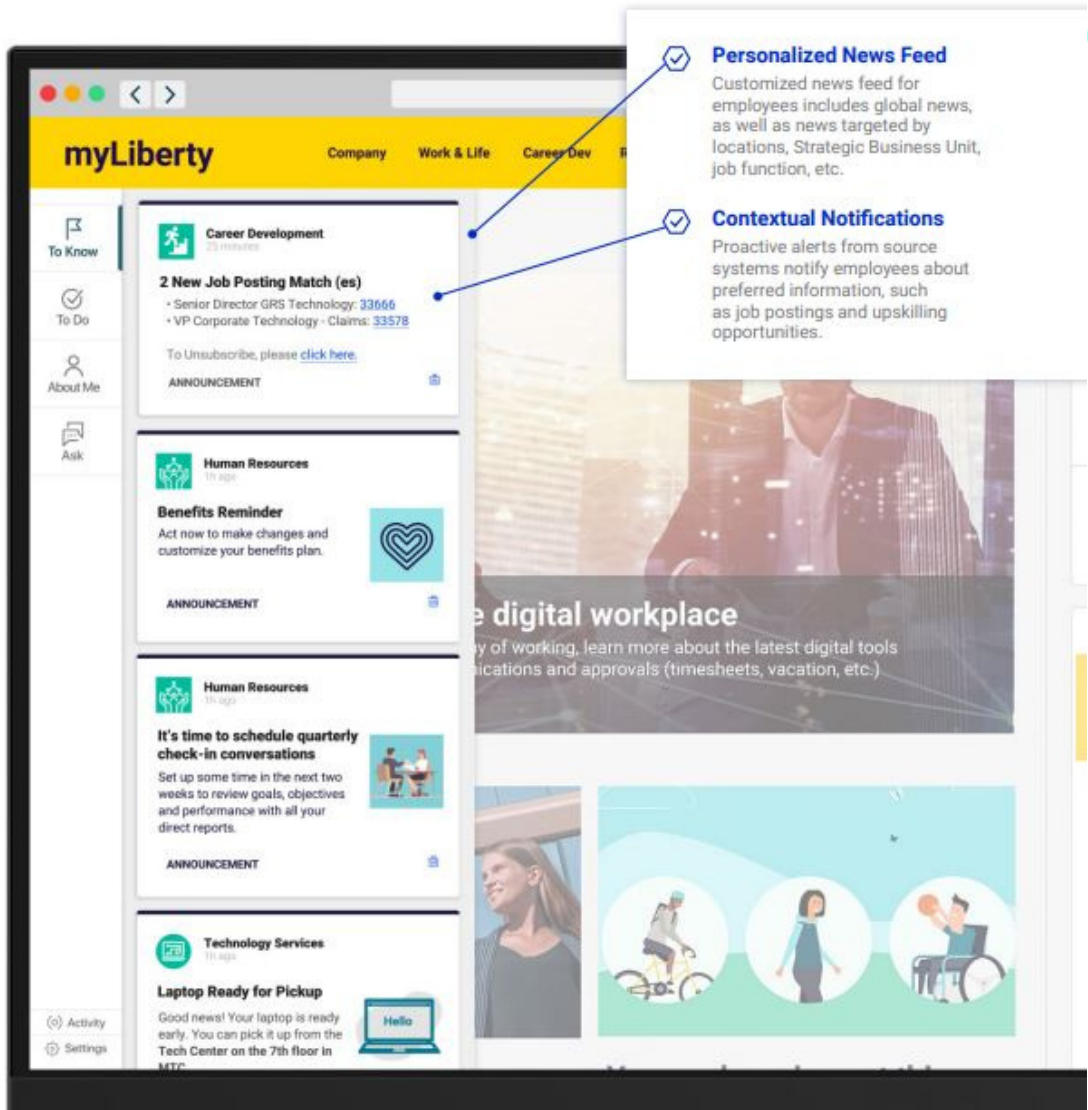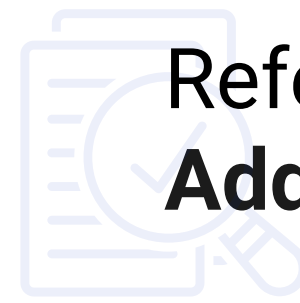# Case studies:

## Proof to support the business case



The AES Journey to Improve
the Digital Employee Experience



Liberty Mutual Insurance Transforms the
Employee Experience with a Modern Intranet

Workgrid

Reference:
## Addressing objections

It can be a challenge to get lots of people on board with *anything*. Integrating Workgrid on the intranet is no different. When you run into objections as you make the business case, try these responses ...

**We can't afford it - it isn't budgeted.**
We can't afford not to. Improving EX translates to tangible and intangible benefits for your business. Think of it as investing in your workforce while also improving your bottom line. Here are just a few of the qualitative benefits of implementing Workgrid:

- 70% faster approvals for managers
- 70% few clicks to complete routine tasks
- 10X faster integration development

And those are just the qualitative benefits. There's more. Much more.

Workgrid

Reference:
**Addressing objections**
*cont...*

**We've got enough to do with the intranet. This would be too much effort.**
Workgrid makes it easy and handles a lot of the heavy lifting. We provide all of our customers with dedicated customer success & solution architects who will guide you through each step of the process.

**We'll never get other departments on board.**
Since you don't need to have every single feature or integration available in Workgrid, you don't need everyone's buy-in to get started. Gain traction with a use case that's immediately impactful for employees - other departments will come around and want a piece of the action once they see your success.

Workgrid
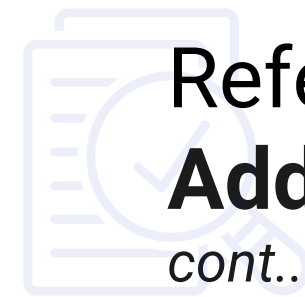
# Reference:
## Addressing objections
*cont...*

**We're not ready - we need to configure our source systems first.**
It's important to not try to boil the ocean. It's easy to get started with out-of-the-box features while you get your integration systems lined up (*Pro Tip: the top 20% use cases provide 80% of the value*).

**We're not sure if we need Workgrid AND an intranet.**
Maybe you don't. If that's the case, consider using Workgrid as a stand alone digital assistant. It's full-range of intelligent features and functionality are available as desktop and mobile apps, as an integration with MS Teams, and the toolbar can also be deployed on any site that makes sense for your organization. The system is very flexible, with plenty of options to meet your unique needs.

Workgrid

# Chapter 5: Intranet Dos & Don'ts

Workgrid

# Additional guidance to help on your intranet journey

Here are additional resources to guide you on through your intranet project …

## Quick tips

- 3 Key Elements of a Successful Intranet
- 3 Tips for Naming Your Company Intranet
- 3 Considerations for a Modern Intranet
- Your Intranet Should Be a Little Bit Messy
- The Ultimate 5-Step Checklist for a Modern Intranet Experience

## Case studies

- How Liberty Mutual Insurance Modernized Their Digital Workplace and Improved the Employee Experience
- "What's Next": The AES Journey to Improve the Digital Employee Experience

## Deeper dives

- Transform Your Intranet Without Replacing It
- Things You Wish You Knew About Integrations and the Intranet
- Amplifying Your Intranet – Guidance for Getting Users to Stick Around
- What Employers Can Do to Address Digital Friction in the Workplace
- A Guide to CMS Intranets and How to Choose One
- Standalone Intranets: Trusted Tools for Business Continuity and Security
- How to Build an Effective Intranet Governance Model
- Buyer's Guide to Intranet and Employee Experience Platforms
- How Intranets and EX Platforms Complement and Compete
- Intranet Platforms 2022 – The State of the Industry
- Best Intranet Features and Capabilities

Workgrid

# Want to learn more?

Check out the following resources:

**Workgrid Digital Assistant Overview**

**Request a Demo**

Workgrid