

## SCENARIO INTRODUCTION

You've been shortlisted for a consulting contract at "Lizard Farm" a large national insurance company. The company is facing a variety of issues and are considering your engagement in solution development. The consultant they choose will be requested to use insights from analysis of their company's social network to strengthen recommendations.

The Company has recently completed a firm-wide survey that includes network information about employee communication and collaboration patterns, as well as measures of individual sentiments and abilities. This data is available in the Syndio dashboard, which allows you to explore survey data and reveal insights into organization, group and individual relational information.

## COMPANY BACKGROUND

Lizard Farm is one of the nation's largest providers of healthcare insurance and services. It is also one of the most diversified insurance companies in the United States and a leader worldwide in helping people live healthier lives and helping to make the insurance system work better for everyone.

It offers a broad spectrum of products and services, from health care coverage and benefits services to information and technology-enabled health services. Through its businesses, the Insurance Company serves more than 20 million customers.

In 2015, the Insurance Company reported revenue of \$70.6 billion, up 7% from the previous year, and net income of \$4.6 billion. The company estimates revenues in 2016 from \$75 to \$80 billion.

Their corporate headquarters are in the Chicago, Illinois metropolitan area. They also have sizable facilities in Austin, Denver, Houston, Miami and New York. With so many employees helping people, they've developed technology that allows employees to work together to accomplish their goals. More than 20% of employees take advantage of life/work balance via telecommuting.

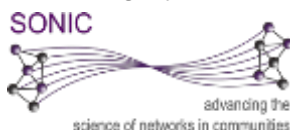
## INTRODUCING THE 3D NETSCOPE DASHBOARD

The 3D NetScope dashboard provides powerful insight that allows users to better understand their organizations. This introduction document will familiarize you with the dashboard's functionality. Later you will receive scenarios that will allow you to use the dashboard to assist decision making.

## FAMILIARIZING YOURSELF WITH THE DASHBOARD

You will receive log in details via email. Follow the instructions in this email to log into the dashboard and set your password. The dashboard can be found at [app.syndio.io](http://app.syndio.io)

The Dashboard has a variety of different menus you can access. These are introduced below. Subsequently, there is an exercise you can use to familiarize yourself with how to use the dashboard. We highly recommend walking through this exercise so that the in class



session goes smoothly. There is a large amount of data available via the dashboard, so the more familiar you are with the functionality before class the more smoothly the analysis will go.

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Welcome

Welcome to your Dashboard!

The Dashboard is Syndio's platform to manage human capital and improve communities.

You navigate the Dashboard via the menu to the left. Each icon opens a module showing key people, sentiment, advanced ways to examine your organization, or a specific analysis at the population, group, or individual level.

You can expand and collapse the menu by using the arrow at the bottom right. Return to this screen from the Dashboard using the Start Screen button.

Familiarize yourself with the Dashboard by learning more about the modules. Hover over each module to see a description to the right.

Show this on start

To the Dashboard

Home

This module shows strengths, sentiments, and areas to improve for your organization as a whole. Understanding the unique structure of your organization can help you make good decisions about how to carry out initiatives affecting the entire population.

The welcome screen features a menu of options on the left hand side. The following pages will explore each of these options in turn.

**People Finder** Northwestern Case Study | Support Center | My Account | Log out

Showing 502 of 5243 people with connections

Find a person	First Name	Last Name	Department	Influence	Change
<input type="text" value="Name"/>	Stephen	MacLeod	Executive Office	[Bar]	[Bar]
<b>Filters</b>	Joe	James	Executive Office	[Bar]	[Bar]
Groups ▶	Stephen	Rees	Executive Office	[Bar]	[Bar]
Tags ▶	Justin	Gray	Executive Office	[Bar]	[Bar]
Metrics ▶	Kevin	Martinez	Executive Office	[Bar]	[Bar]
Influence x	Dylan	Powell	Executive Office	[Bar]	[Bar]
Tools	Andrew	Ball	Executive Office	[Bar]	[Bar]
[Icons]	Harry	Coleman	Executive Office	[Bar]	[Bar]
	Simon	Walsh	Executive Office	[Bar]	[Bar]
	Richard	Henderson	Executive Office	[Bar]	[Bar]
	Alexander	Bond	Executive Office	[Bar]	[Bar]
	Piers	Gray	Executive Office	[Bar]	[Bar]
	Carl	Lambert	Executive Office	[Bar]	[Bar]
	Dan	Metcalfe	Executive Office	[Bar]	[Bar]
	Julia	Marshall	Customer Service	[Bar]	[Bar]
	Thomas	Peake	Legal	[Bar]	[Bar]
	Donna	Morrison	HR	[Bar]	[Bar]
	Jessica	Wilkins	Customer Service	[Bar]	[Bar]
	Connor	Tucker	Operations	[Bar]	[Bar]

The 'People Finder' tab helps you locate specific individuals within the organization. You can use the filters on the left hand side to filter results. Clicking on an individual's name will take you to their personalized report. The 'People Finder' also shows how people score on different dimensions; influence and change are shown.

A SONIC network dashboard activity powered by Syndio



It is possible to view a number of different dimensions in the 'People Finder' by clicking on the circled pen that is in the column header. For example, clicking the pen on the 'Influence' column reveals 'Retention Impact' as well. Additionally, each column can be sorted in ascending or descending order by clicking the arrow in the column header.



**People Finder**

People Finder helps identify people with specific mixes of attributes and scores. You can filter by:

**Categories**

These are the available segments of your population. They can include organizational, geographic, and demographic categories. Sorting within a category is additive, so, for example, if you select both "North America" and "Europe" from the Category "Continent", the Finder will show people from both "North America" and "Europe". Sorting across categories further limits the results, so if you selected "Female" from the category "Gender" in the previous example, the Finder will display only women in North America and Europe.

**Influence & Retention Impact**

The fourth column displays Influence and Retention Impact scores, which are computed from the connections selected by users in the survey.

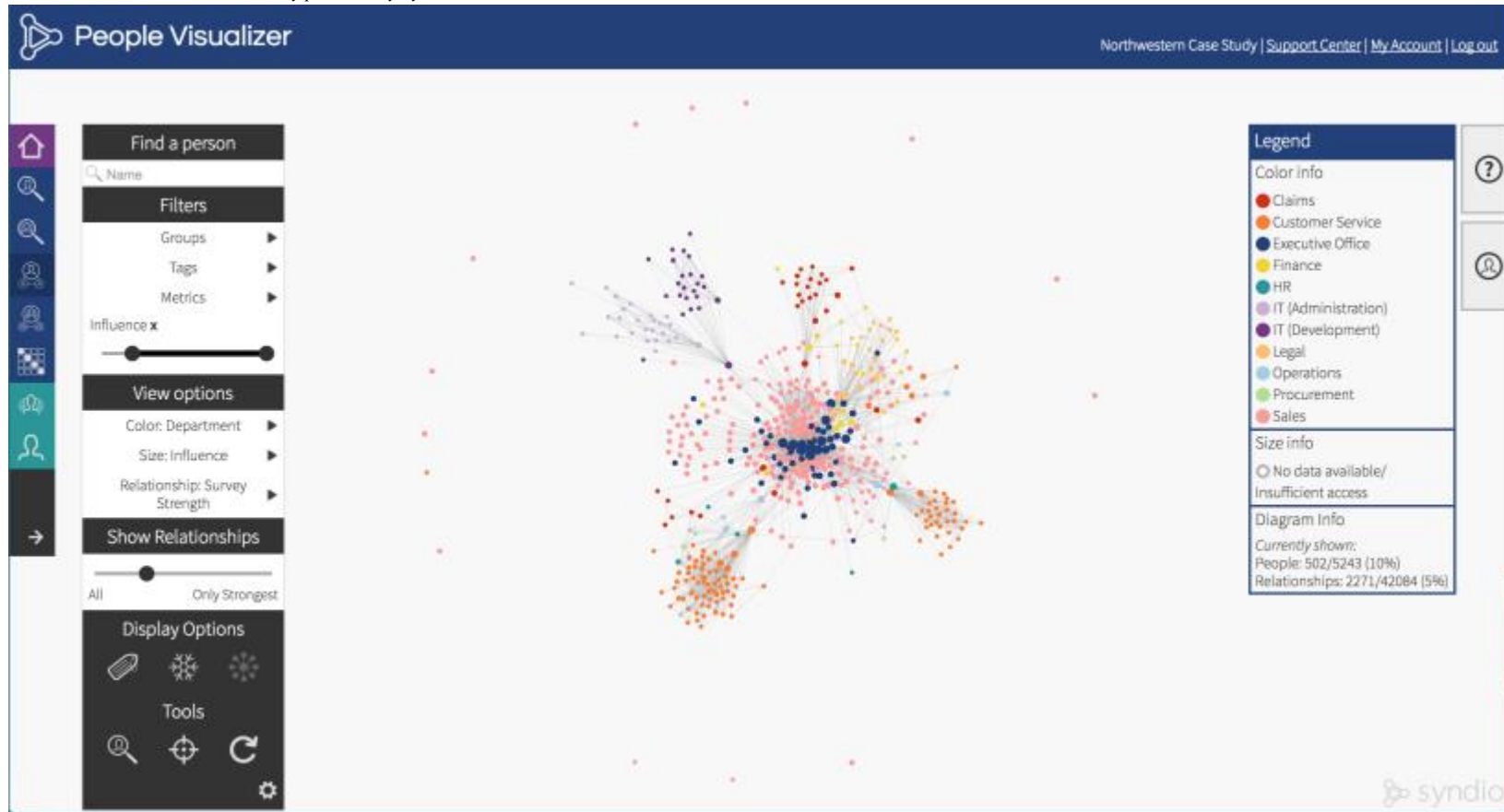
There are many options available on each page, and clicking the 'Help' tab with the question mark will reveal details specific to each page. As an example, see the 'Help' tab for the 'People Finder' page. The 'Help' tab is on the right hand side of the screen and expands upon clicking.

Group Finder
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Showing 11 of 11 Departments

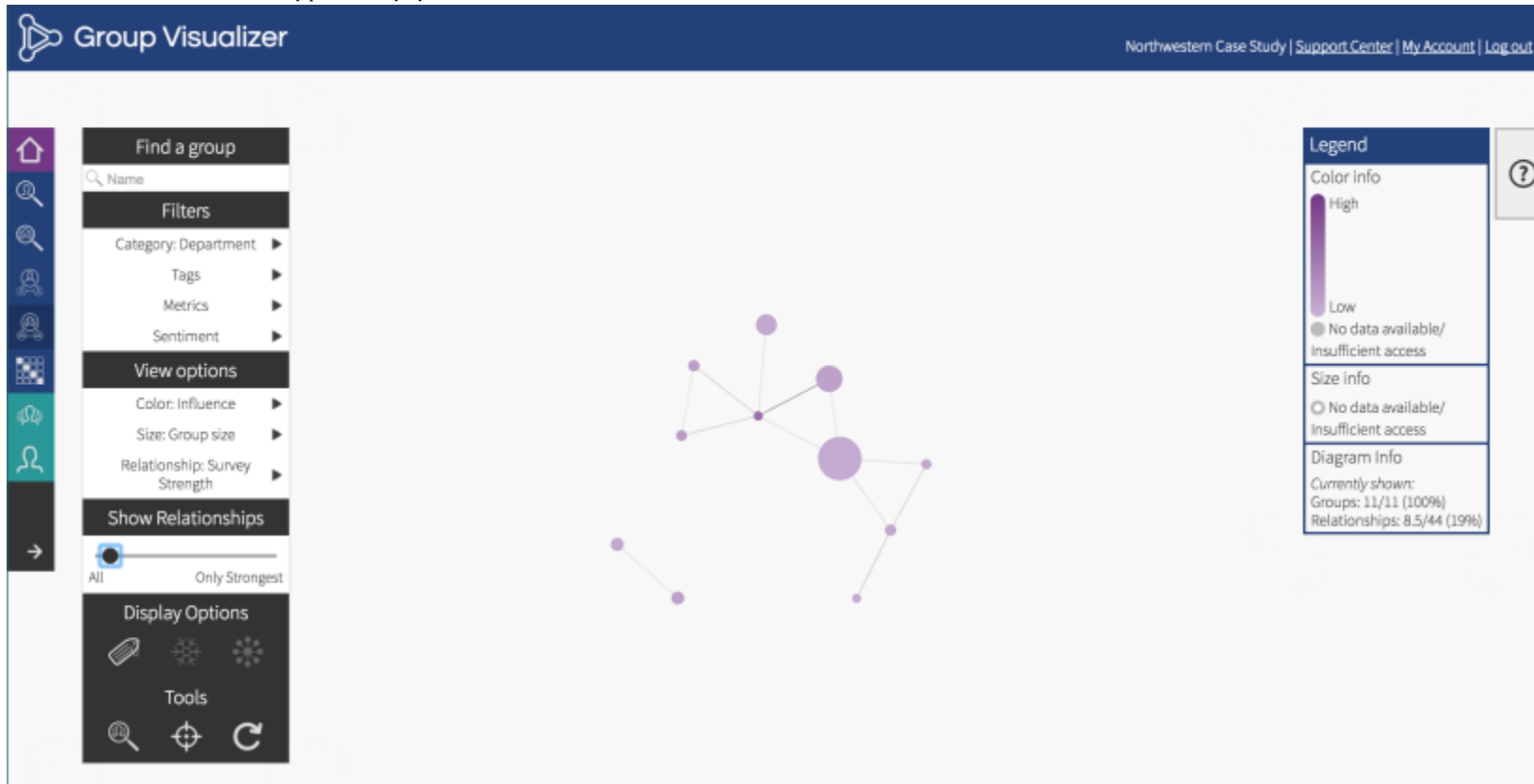
Find a group	Name	Influence ▼	Change	Engagement
Group Name	Executive Office	<div style="width: 40%; background-color: #8e44ad;"></div>	<div style="width: 10%; background-color: #3498db;"></div>	<div style="width: 40%; background-color: #27ae60;"></div>
Filters	Legal	<div style="width: 20%; background-color: #8e44ad;"></div>	<div style="width: 10%; background-color: #3498db;"></div>	<div style="width: 40%; background-color: #27ae60;"></div>
Category: Department ▶	Finance	<div style="width: 15%; background-color: #8e44ad;"></div>	<div style="width: 10%; background-color: #3498db;"></div>	<div style="width: 40%; background-color: #27ae60;"></div>
Tags ▶	IT (Development)	<div style="width: 15%; background-color: #8e44ad;"></div>	<div style="width: 10%; background-color: #3498db;"></div>	<div style="width: 40%; background-color: #27ae60;"></div>
Metrics ▶	Sales	<div style="width: 15%; background-color: #8e44ad;"></div>	<div style="width: 10%; background-color: #3498db;"></div>	<div style="width: 40%; background-color: #27ae60;"></div>
Sentiment ▶	IT (Administration)	<div style="width: 15%; background-color: #8e44ad;"></div>	<div style="width: 10%; background-color: #3498db;"></div>	<div style="width: 40%; background-color: #27ae60;"></div>
Tools	Operations	<div style="width: 15%; background-color: #8e44ad;"></div>	<div style="width: 10%; background-color: #3498db;"></div>	<div style="width: 40%; background-color: #27ae60;"></div>
	HR	<div style="width: 15%; background-color: #8e44ad;"></div>	<div style="width: 10%; background-color: #3498db;"></div>	<div style="width: 40%; background-color: #27ae60;"></div>
	Claims	<div style="width: 15%; background-color: #8e44ad;"></div>	<div style="width: 10%; background-color: #3498db;"></div>	<div style="width: 40%; background-color: #27ae60;"></div>
	Procurement	<div style="width: 15%; background-color: #8e44ad;"></div>	<div style="width: 10%; background-color: #3498db;"></div>	<div style="width: 40%; background-color: #27ae60;"></div>
	Customer Service	<div style="width: 15%; background-color: #8e44ad;"></div>	<div style="width: 10%; background-color: #3498db;"></div>	<div style="width: 40%; background-color: #27ae60;"></div>

The 'Group Finder' tab shows overview measures for specific groups within the organization. The filter tab on the right hand side will allow you to drill down to locate specific groups. Clicking on a group name will take you to a report about that group. The interactions with the 'Group Finder' tab are similar to the 'People Finder', the main difference is that the dimensions are aggregated within each group.



The 'People Visualizer' tab shows network structure within the organization. The filters on the left will allow you to show specific groups of individuals. Note the slider in the filter section which controls how strong of a tie cutoff you wish to include in the visualization. In the 'View Options' menu you can control what the node sizes and colors represent, and which type of relationship is visualized. The 'Display Options' tab controls the network display. You can use it to 'freeze' the movement, show/hide labels, zoom in or out, rotate the visualization, or switch to an ego-centric perspective.





The 'Group Visualizer' tab shows the connections between groups within the organization. The 'Filters' allow you to control which types of groups you visualize, while the 'View Options' menu allows for control of the node color and size as well as the type of relationship visualized.



## Performance Settings

For performance reasons, we limit the number of people and relationships that can be shown at once.

If you think your computer can show more than the recommended amount of data, you can change these settings below.

*Warning: Showing too much data at once can crash your browser.*

Show me a maximum of  people and  relationships.

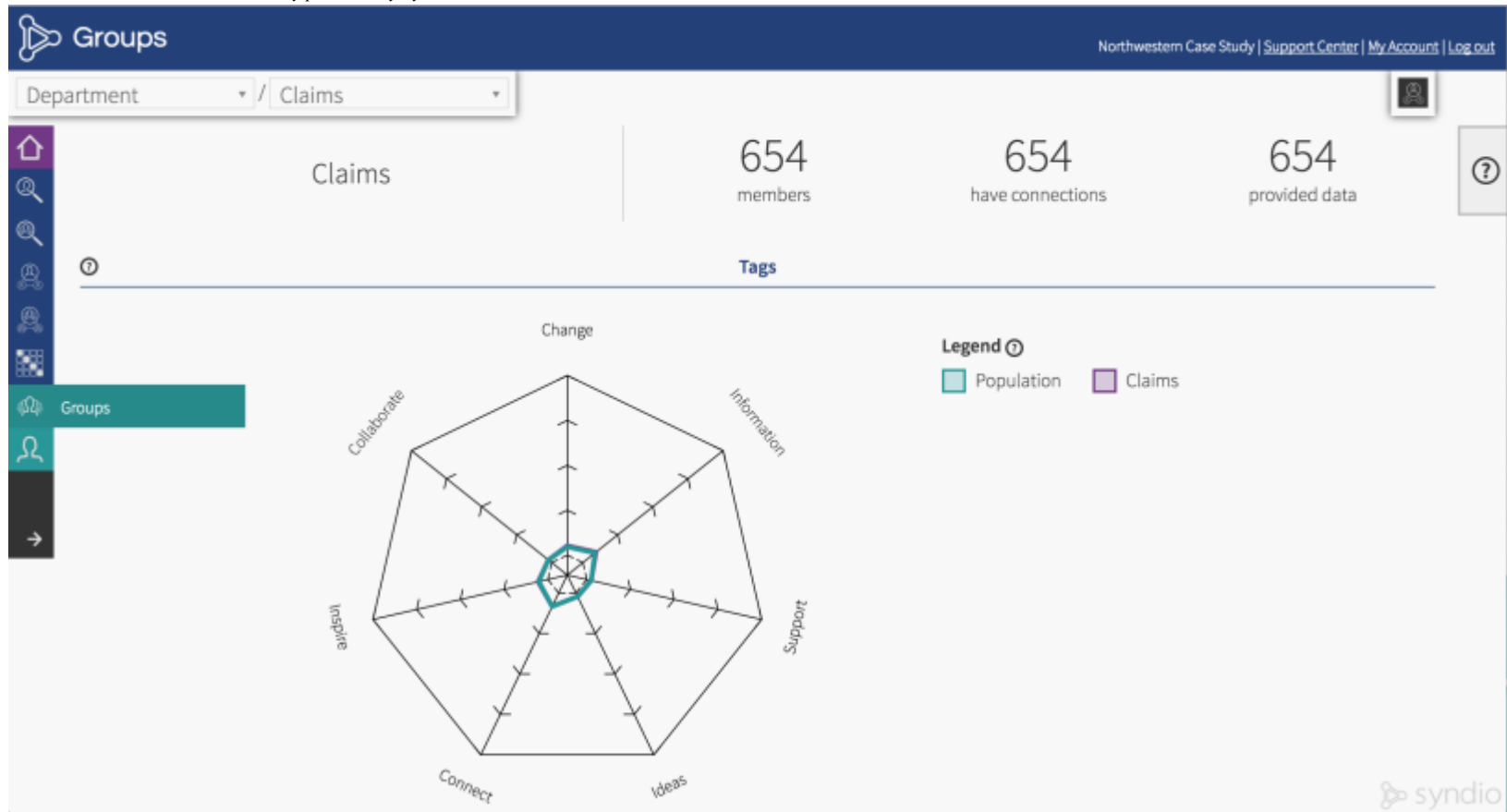
Save and close

Reset to defaults

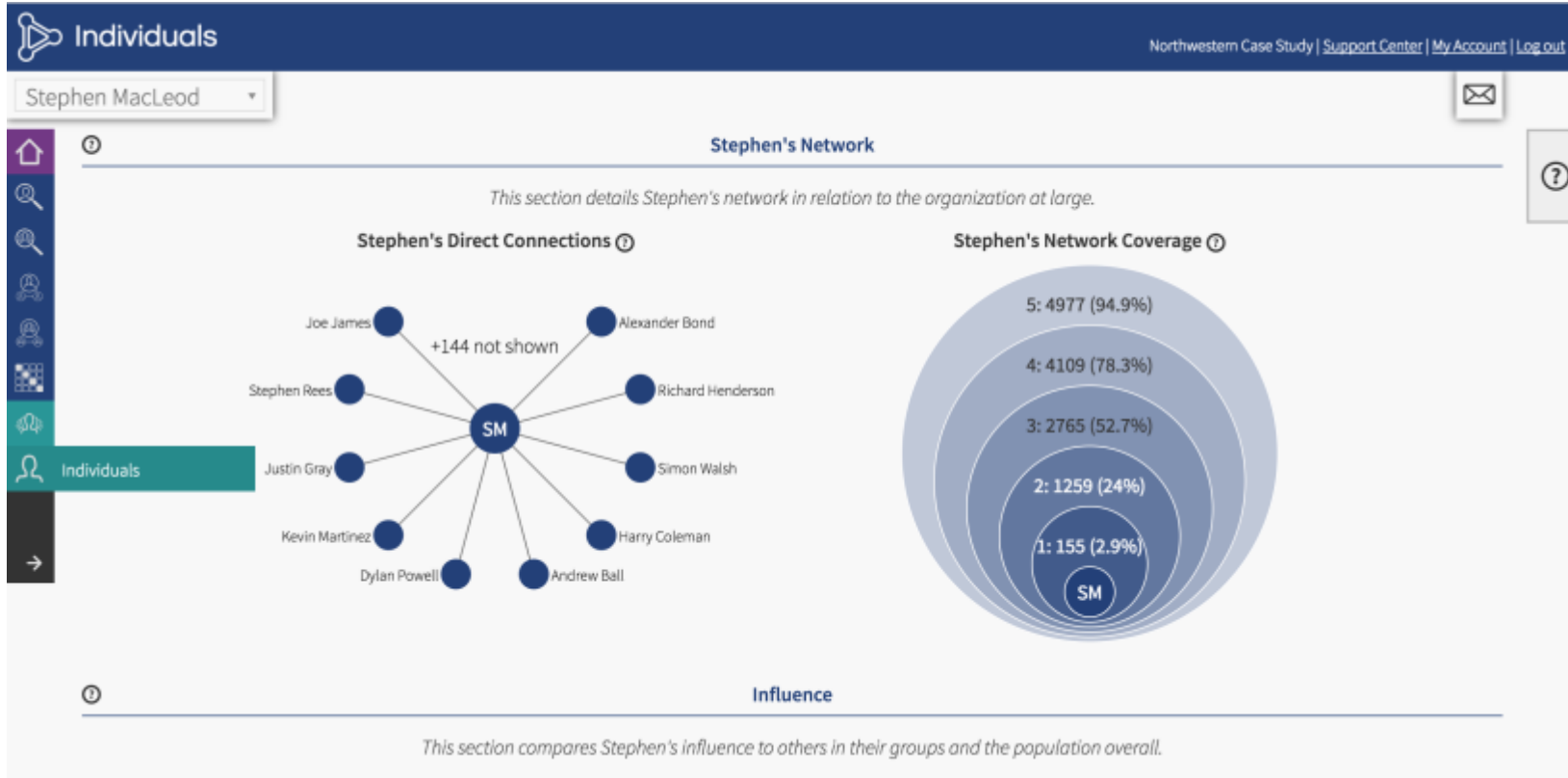
If the 'People Visualizer' or 'Group Visualizer' seem to running slowly, then you can change the performance settings. The settings are the gear found in the 'Display Settings' of both types of visualizers. You can change the maximum number of people and relationships shown.



The 'Connectivity' tab shows the strength of connections between different groups or types of individuals within the organization. The 'From' and 'To' menus control which groups are displayed on each axis, while the 'Relationship' menu controls which type of relationship strength is visualized.



The 'Groups' tab show the reports for groups within the organization. The drop down menus at the top allow you to control which group reports you are viewing.



The 'Individuals' tab shows reports for individual employees of the organization. These reports include some demographic information, relational information about who the individual is connected to, and 'Key People' scores which show how the individual compares to other employees along a number of dimensions measured in the survey.

## FAMILIARIZATION EXERCISE

1. First, explore the dashboard's features:
  - a. Click the outward facing arrow on the left hand menu to show the names of different modules
  - b. Mouse over each model and read the short descriptions.
2. Go to 'People Visualizer' to get a sense of the network
  - a. Remove any filters that are selected in the 'Filter' menu on the left hand side of the page.
  - b. Note: When you initially load the People Visualizer, it will be filtered to only show nodes with high 'Influence.' Click the 'x' beside that to show all of the employee-nodes.
  - c. Hint: When you add or remove filters, the graph can get drastically larger or smaller. Use the 'target' to resize the graph.
  - d. Note: You can always 'Freeze' the visualization so that nodes stop moving by pressing the Freeze button in the 'Display Options' menu (it looks like a snowflake).
3. Change the color to represent departments: View options -> Color -> Department
4. Change the relationship definition to see the different networks that exist in the organization: View options -> Relationship -> Various Options
  - a. Each of these networks represents a different type of relationship in the organization. These are different survey questions that were asked within the organization.
  - b. The 'Survey Strength' measure is a composite of all the other measures.
5. Filter the network to show a single department's relationship: Filters -> Groups -> HR
  - a. Resize the image if needed at this point (use the target style button on the bottom left of the screen)
6. Experiment with resizing the nodes by various attributes: View options -> Size: -> Various options
7. Experiment with varying the relationship threshold slider. This sets a cut point for the strength of relationship at which you want to visualize a relationship between nodes.
8. Now, let's try filtering so that we can view subgroups within the organizational network
  - a. First remove any filters you have already added.
  - b. Filter on location: Set the location to Chicago and have a look at the network
  - c. Remove the location filter (click the 'x' beside the location name)
  - d. Next, filter on Age. Select the 45-54 age range.
  - e. Remove the 45-54 range, and select the 25-34 age range network.
    - i. Note: You might note at this point that there appears to be a significant difference in how connected the middle aged employees are in comparison with the youngest employees.
  - f. Try out the other filters. Try some 'cross tabs' by combining different filters

9. In order to find out who is close to an individual you can change the network projection to an egocentric one. Click a node of interest, and then in the Display Options menu click 'Show degrees of separation.' This orders nodes based on how many links there are between them and the currently selected node.
10. Let's look at inter-office connections:
  - a. Go to the 'connectivity' (the grid with diagonal squares icon on the left-hand menu) tab and explore a few of the different connection matrices.
11. Complete the table below by identifying the correct individual for each listed set of traits.

Traits	Person / People
The individual who works in the Executive Office and is older than 65	
The two individuals who work in HR and have the highest Social Capital scores	
The individual who works in the Chicago office and is the most well-connected based on overall Survey Strength.	
The woman with the highest Leadership 'Key People' score	

The above will give you a sense of how the dashboard works. Feel free to explore other tabs and functionality before the session. There is a large amount of data available via the dashboard, so the more familiar you are with the functionality before class the more smoothly the analysis will go.