



SAPIENCE VUE QUICK START GUIDE

The key to a high-performing happy team starts here.



**GIVING YOU THE PEACE
OF MIND KNOWING YOUR
TEAM IS ENGAGED
WHEREVER THEY WORK.**

Introduction

WHY THE GUIDE?

Simply put, the purpose of the Quick Start Guide is to quickly get you up to speed on Sapience Vue so you and your team can benefit from Sapience on day one.

Inside you'll find:

- [How to introduce Sapience to your team](#)
- [Exactly where \(and how\) to get started](#)
- [How to easily read your team's data](#)
- [A 90-day transformation challenge](#)
- [Tips and tricks to make your work life easier \(and theirs too\)](#)

We've also got you covered with [Key Terms](#) and the top [FAQs](#).





HOW TO INTRODUCE SAPIENCE

Everyone moves through change at their own pace. Here's how to help your team become early adopters and great adaptors.

State the why

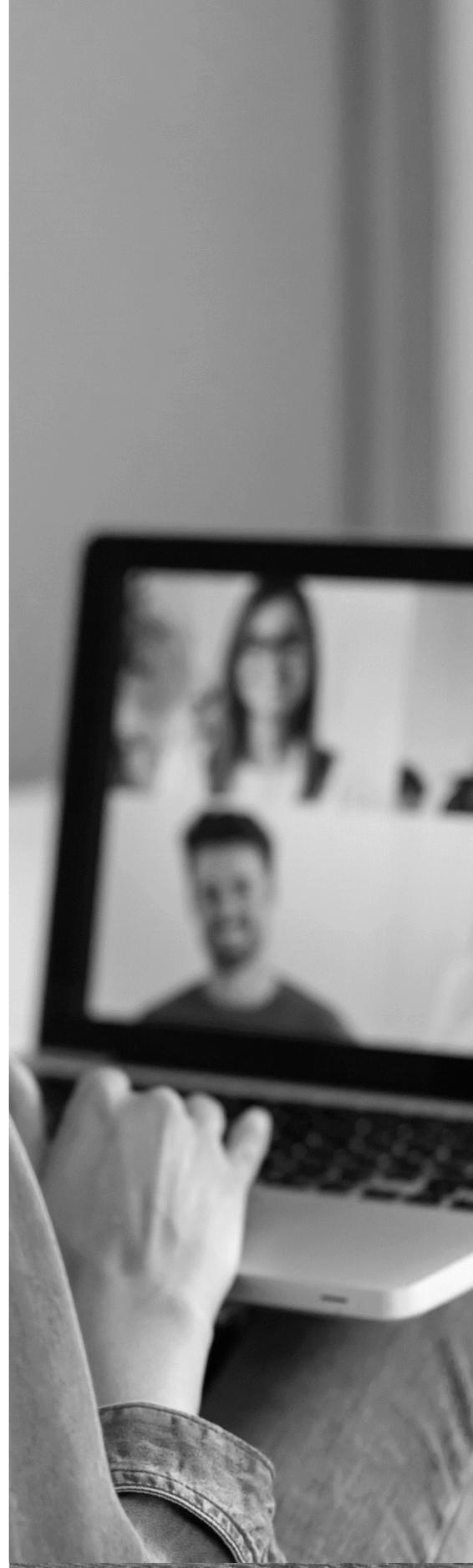


Tie your message into a **known** organizational goal or guiding principle. Doing so helps people understand and accept change, even if the change doesn't seem immediately beneficial to them.

Examples:

- *"This change is part of our XYZ competitive road map..."*
- *"Transparency is one of our guiding principles and Sapience helps us build that foundation of trust."*
- *"Work life balance is important for us to stay healthy and focused and Sapience helps us with that."*

Notify early and often



Communicate the change before it happens, as it happens, after it happens, and through a variety of ways. This helps keep the change **top of mind** and prevents your message from becoming just another flavor-of-the-month corporate initiative.

- State what's in it for them
- Verbal town hall updates
- Team meeting discussions
- One-on-ones stating expectations
- Share internal success stories

Drive the change



It's **normal** for people to fear and resist change because we don't always know what that future looks like. How you talk about Sapience greatly **influences** how your team adopts it.

- Talk positively about Sapience
- Openly state specific expectations, goals, and boundaries
- Describe the future state and what it looks like to them
- Let your team decide areas of focus
- Create a feedback channel. This helps you build team trust

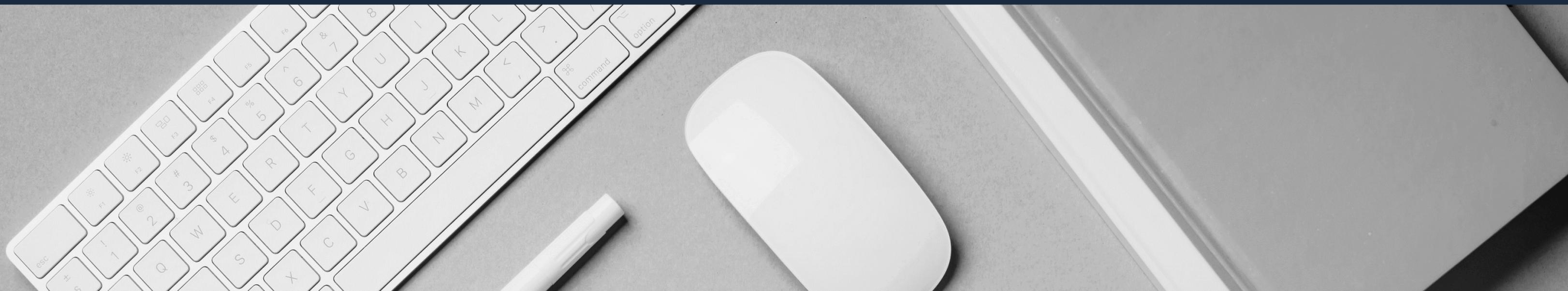
A man with glasses and a light blue button-down shirt is sitting at a desk in an office. He is looking at a computer monitor. The desk has a keyboard, a mouse, and some papers. The background shows a window with blinds and some plants. The entire image is overlaid with a dark blue semi-transparent filter.

BEFORE YOU DIVE IN

Let's get you setup and ready
for action.

STEP 1

Verify your team's organizational structure. Here's how...



1

Search by Location, Department, Employee or Managers

Search

All

Adam Ferguson	Alice Chavez	Andrea Weaver	Elizabeth Fisher
Eric Carpenter	Harold Washington	Janice Ray	Keith Bowman
Linda Little	Marie Williamson	Martha Walker	Norma Stanley

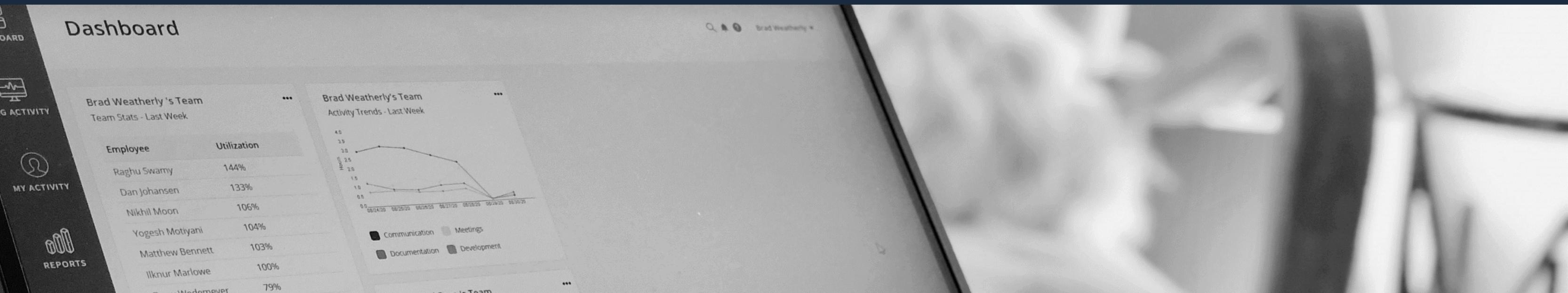
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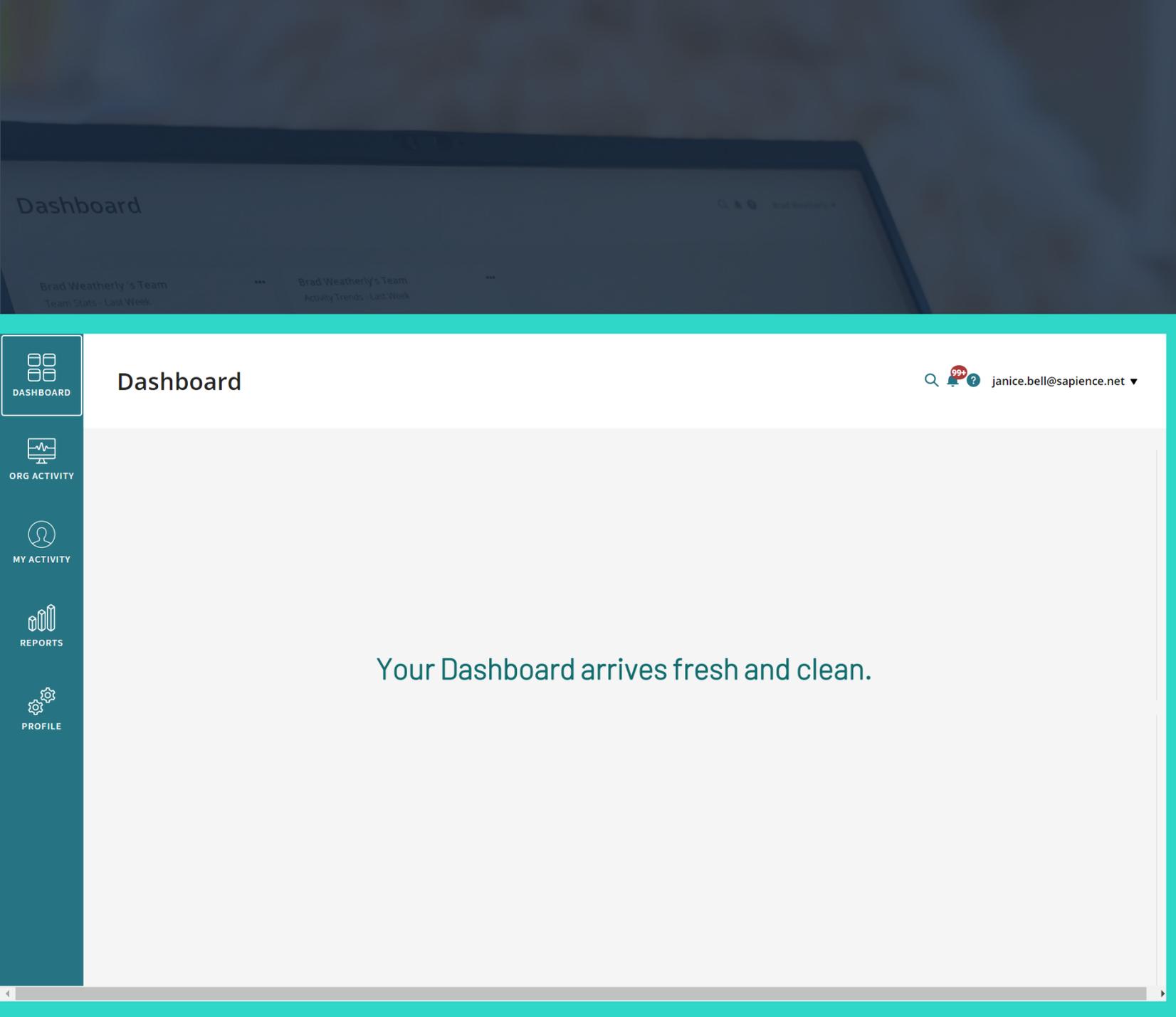
(1) Click **Org Activity** located on the left menu bar. (2) Then verify your team members are visible in the boxes below the Search field.

If you have managers who lead their own team, click on their name to view their team as well.

STEP 2

Pin your favorite reports to your personal dashboard.

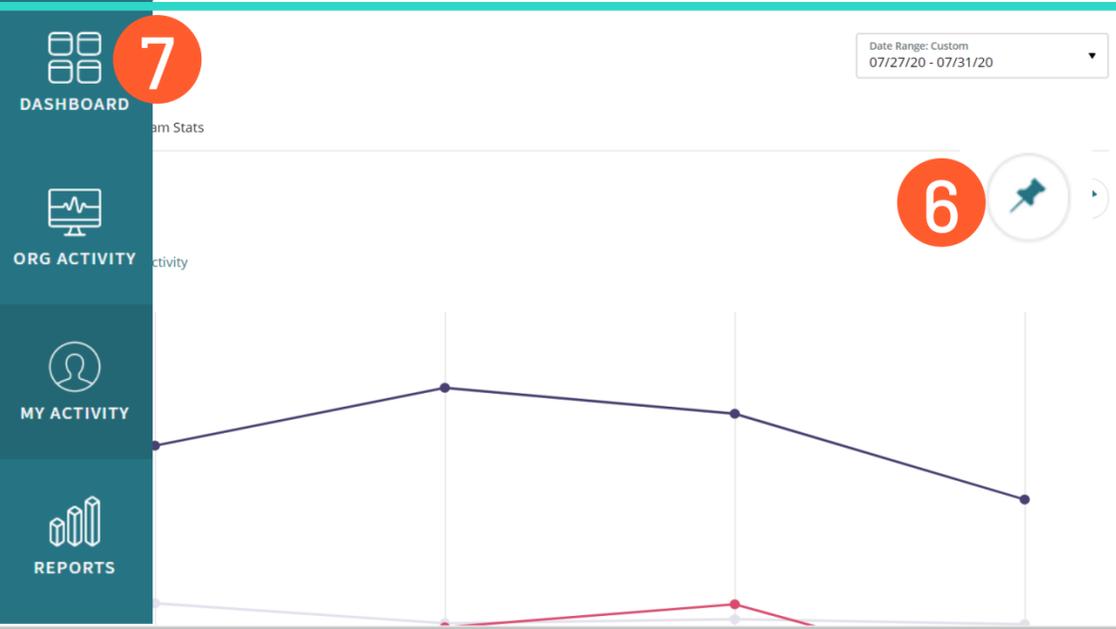
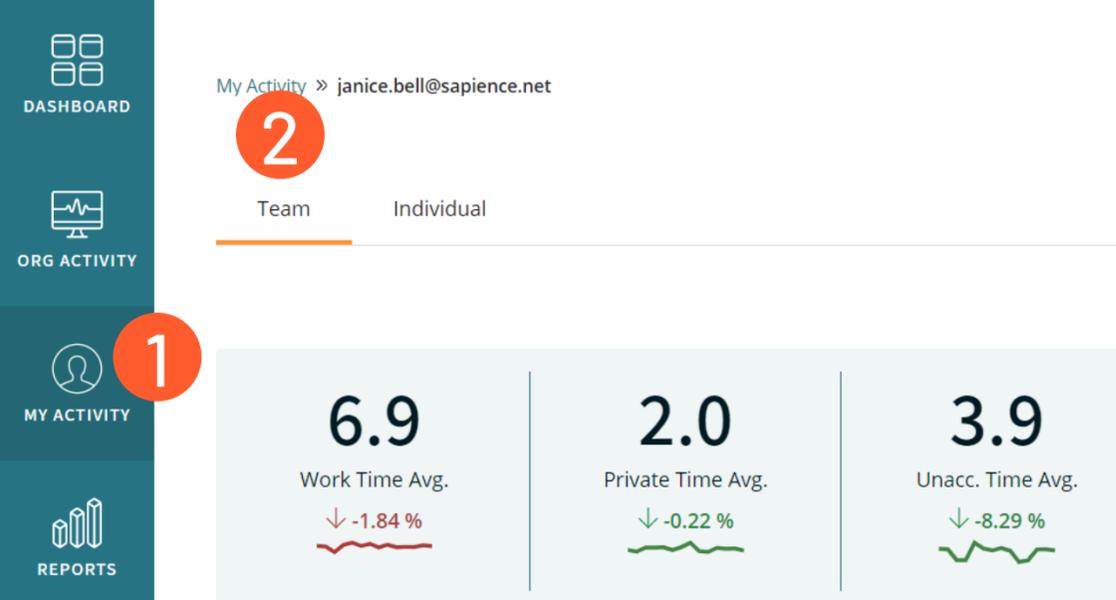




Peace of mind starts here.

Your personal dashboard gives you a snapshot of your team's stats so you can quickly see that things are on track then move on with your day. There is no easier way to run your business and manage your team.

Your dashboard comes as a clean slate right out of the box. Let's pin a few of the most popular data tiles to your dashboard.



LOCATE THE REPORT

(1) Click on **My Activity** on the left menu bar. (2) Select **Team** located near the top of the page. (3) Scroll down to **Device Activity Analytics**.

SELECT AND FINE TUNE YOUR REPORT

(4) Choose a report type to pin. Let's choose **Trends**. (5) Next, select the date range and dropdown options you want, if applicable.

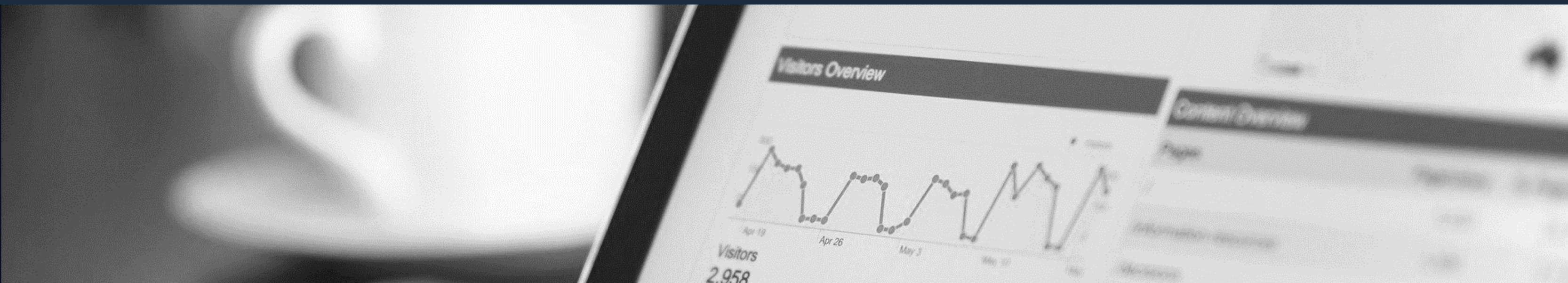
PIN THE DATA

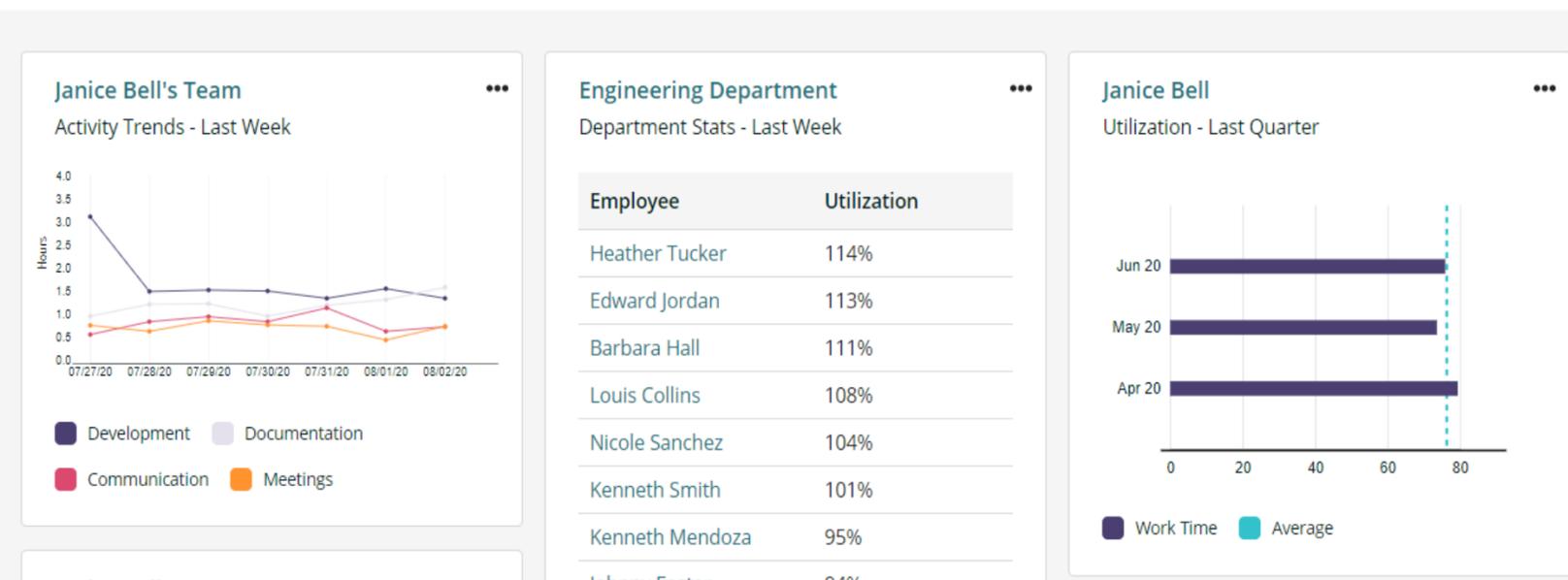
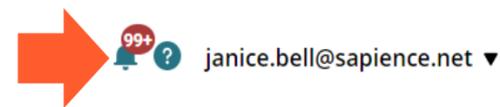
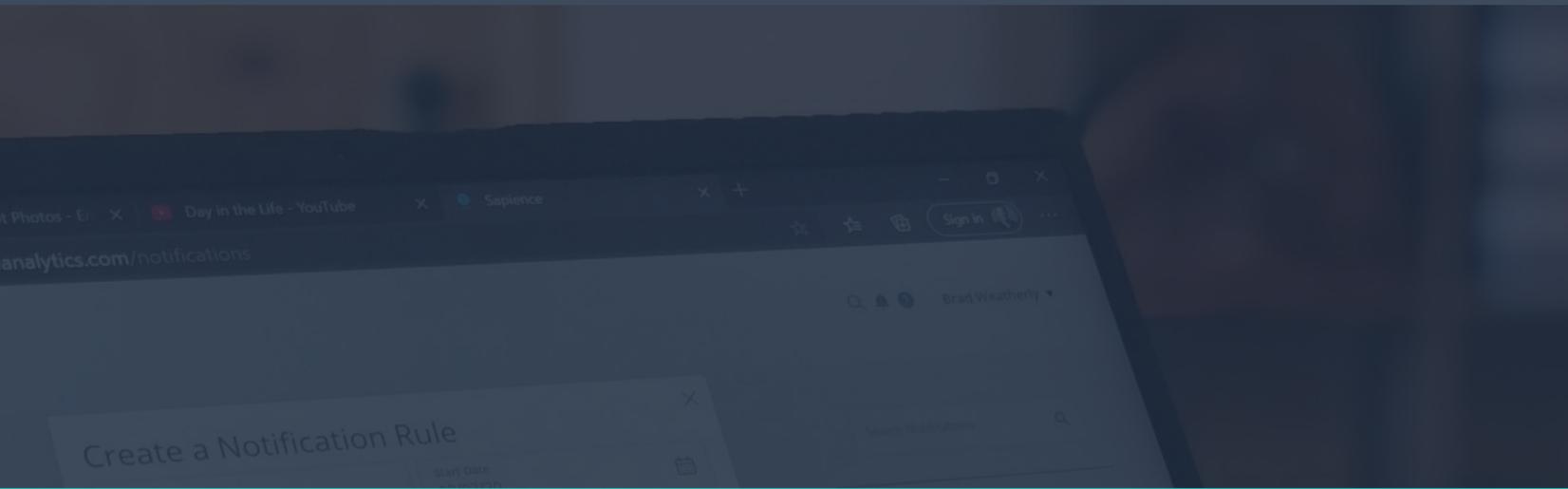
(6) Pin the **Trends** data to your dashboard by clicking on the pin icon located in the top right corner of the graph. (7) Lastly, click on **Dashboard** located on the left menu bar to confirm your new data tile is visible on your dashboard.

Repeat and pin the **Utilization** and **Team Stats** data next!

STEP 3

Add your first notification so you're alerted about the things that are most important to you.



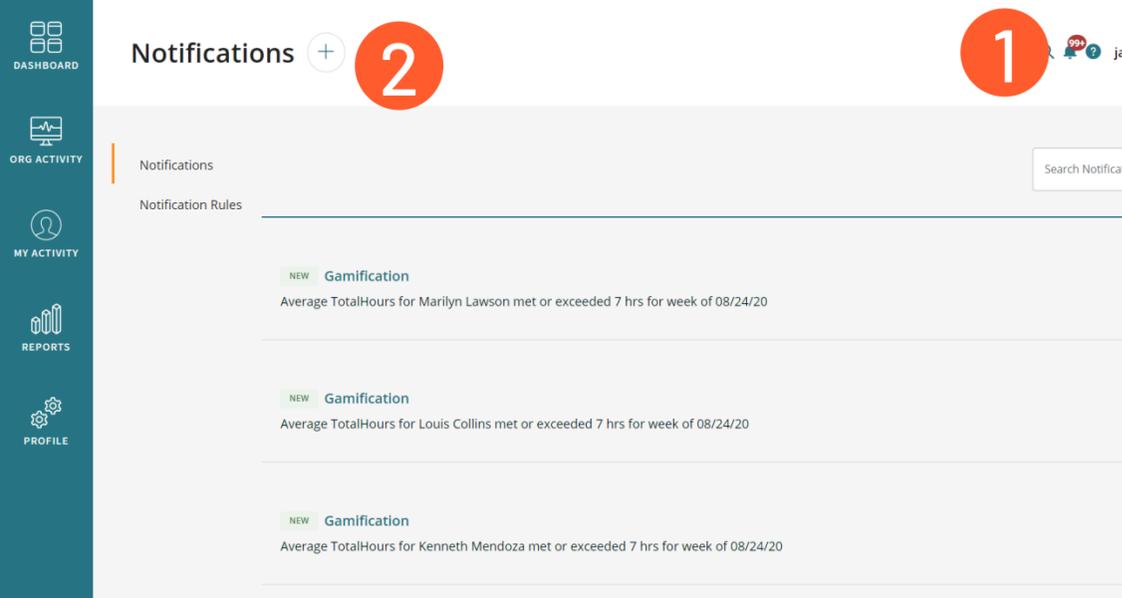


Macro-manage, not micro-manage.

Have a worker who is not spending enough time on core activities? Or, maybe a worker who is working too much and is at risk of burnout?

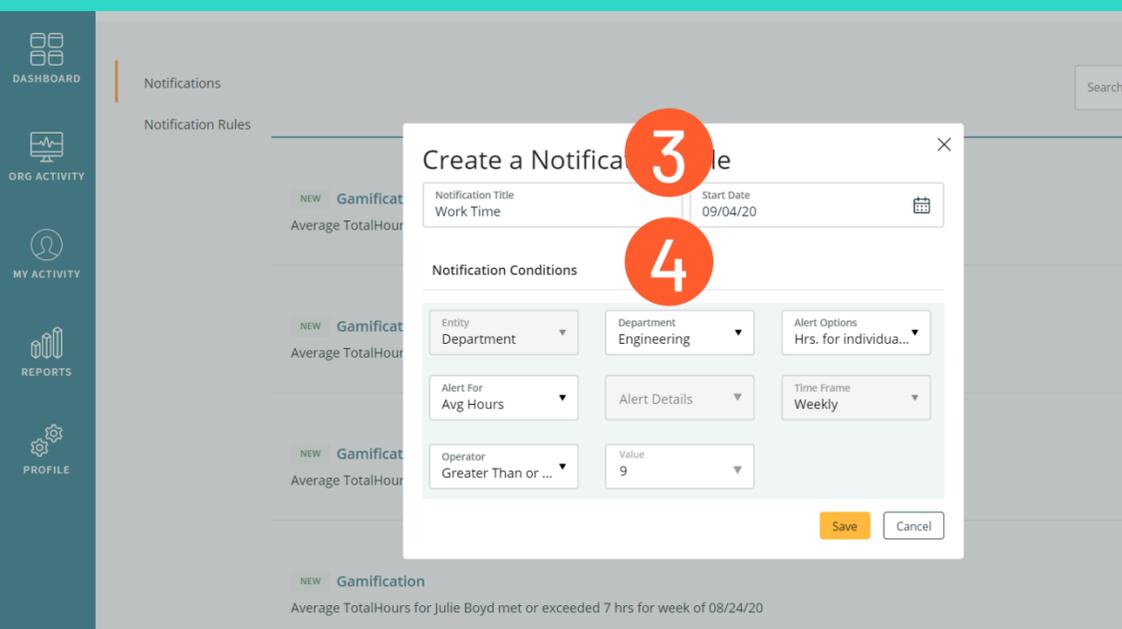
Notifications help you mentor your team by alerting you when certain activities occur so you can keep them sailing smoothly.

Let's make your first one!



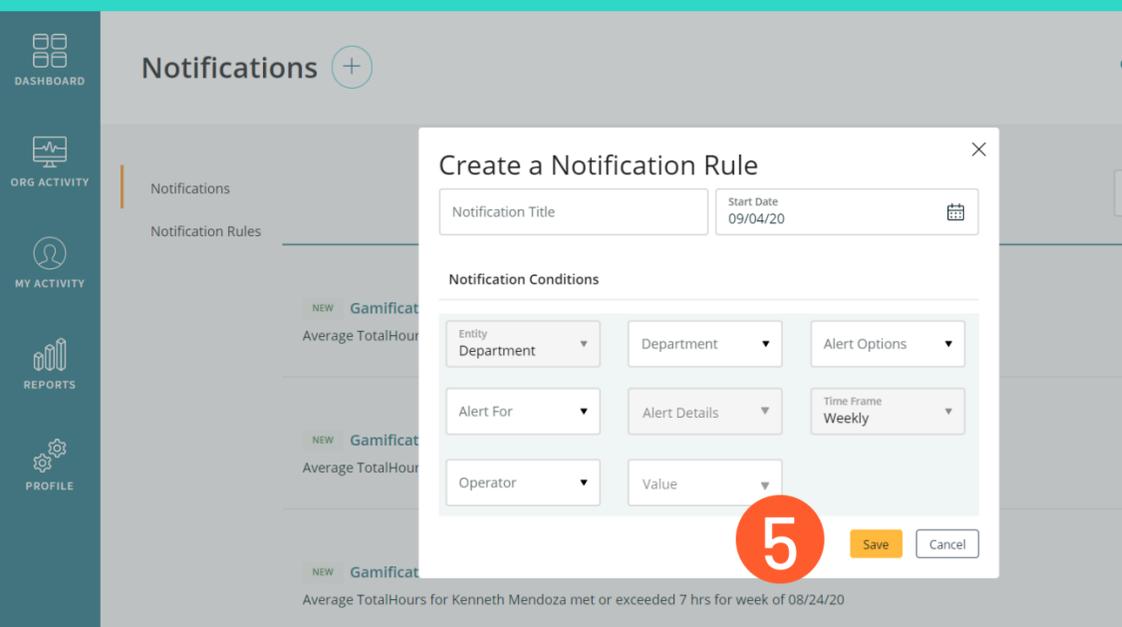
START A NEW NOTIFICATION

(1) Click on the **Notification** icon  located on the right corner of your Vue page. (2) Next, when the Notification page displays, click the **+** to begin building your new notification.



CREATE THE NOTIFICATION RULE

(3) Name your notification and the date you want it to start tracking. (4) Under Notifications Conditions, customize the notification options you want to be alerted about. *Having trouble deciding?* Try building a notification for Avg. Hours worked less than 6.



RELAX!

(5) Click **Save**. A badge will appear on the Notification icon when an alert has been triggered. Now you can move on with your day while Vue works in the background to keep you informed.



HOW TO READ YOUR TEAM'S DATA

Find hidden capacity. Balance team workload. Identify possible flight risks. Gauge future workload. Achieve work life balance.

Trends tell you that your team is doing the right work, at the right time, every time.



Trends



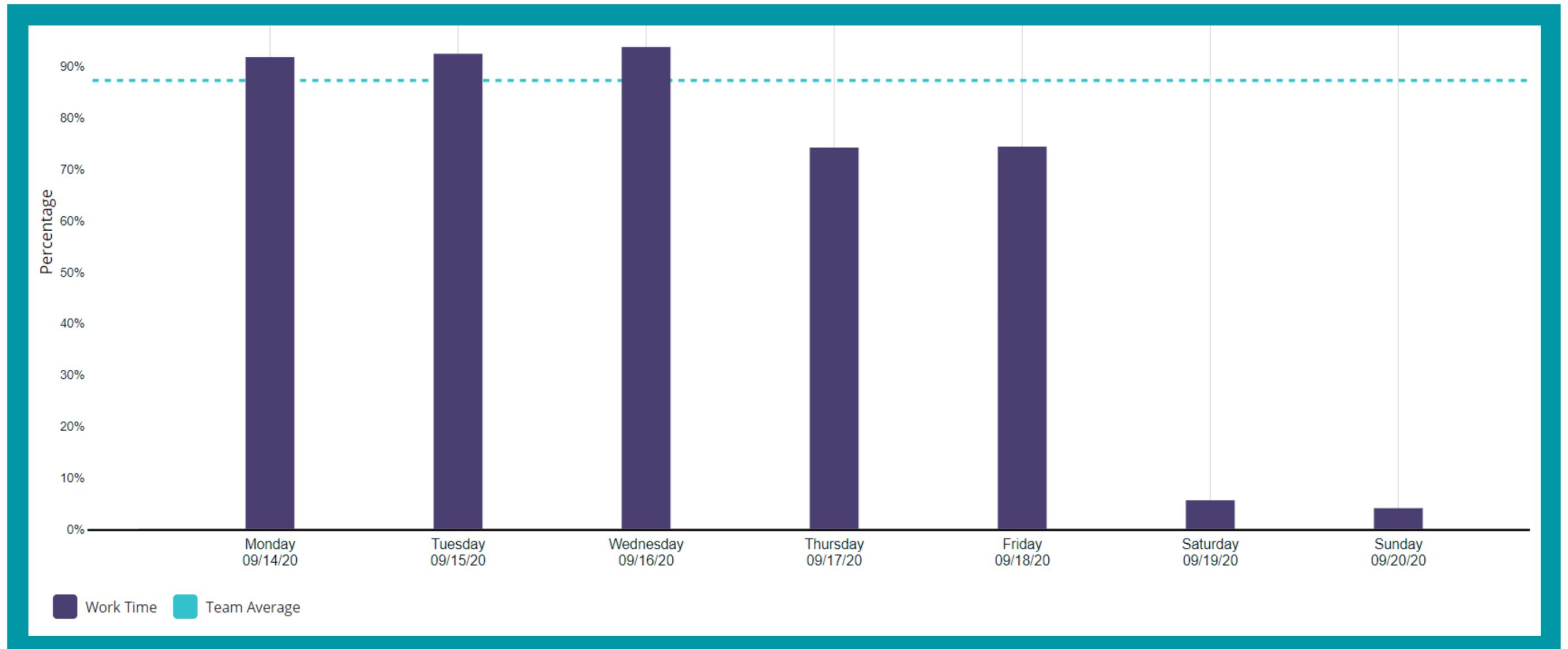
Wondering if your team is on track is no longer a guessing game.

Trends gives you insight to where your team is spending their time, whether that is by Activity or Application.

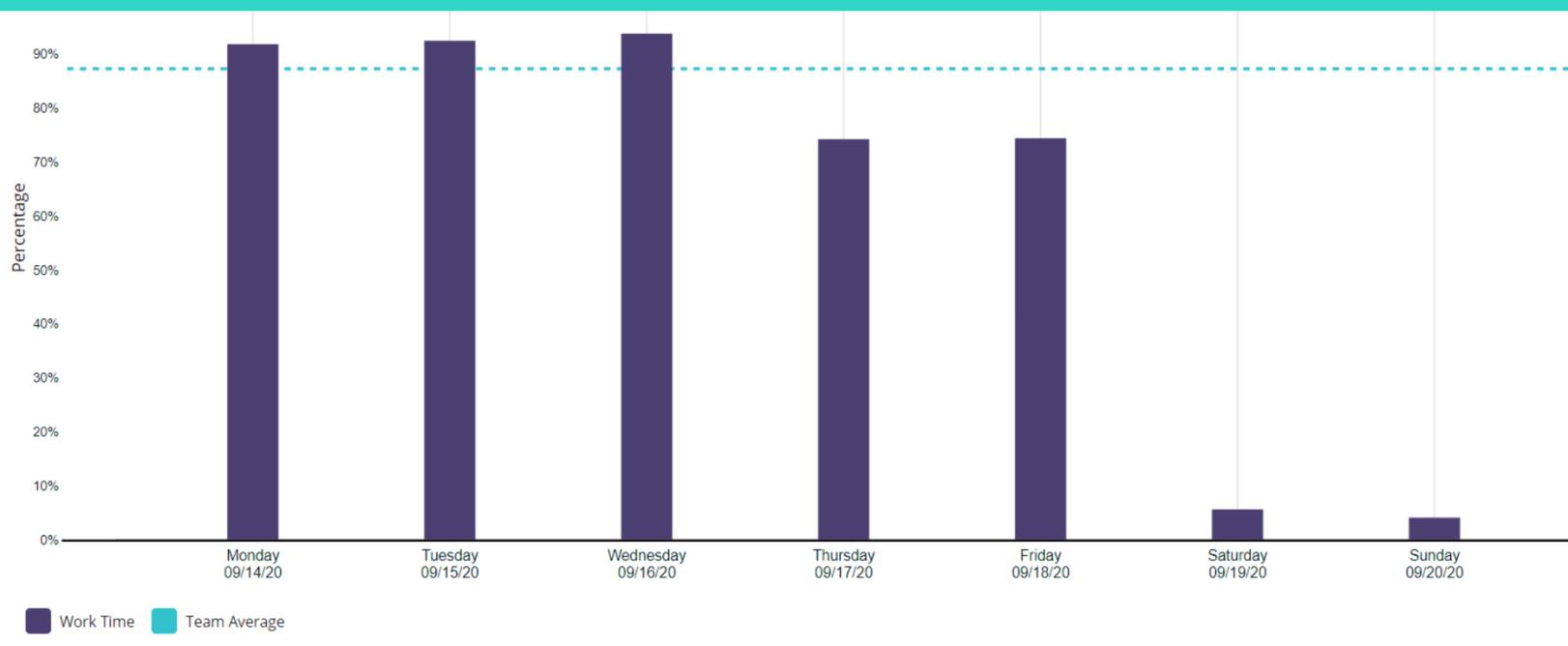
Trends answers questions like:

- Is my team spending too much time on email?
- Are they focused on Excel when they should really be focused on MS Project?
- Can less Private Time on Fridays make Mondays a little easier (and a little more fun)?

Utilization buys you time without costing a thing.



Utilization



Balance workload between teams?
Take on that new project? Reprioritize existing projects? Move the team meeting to a better day? Assess resource requirements for that new project? Plan developmental training?

Utilization answers all these questions (and more!) so you can easily adapt to current and future demands with the peace of mind knowing your team is ready to handle whatever is thrown at it.

True work life balance begins with **Team Stats**

Employee	Role	Utilization	Work Time
Andrea Weaver	QA Engineer	123%	
Keith Bowman	QA Engineer	98%	
Robert Owens	DEV Engineer	93%	
Alice Chavez	QA Engineer	93%	
Harold Washington	DEV Engineer	92%	
Marie Williamson	QA Engineer	90%	
Norma Stanley	DEV Engineer	80%	
Elizabeth Fisher	Customer Support Engineer	79%	
Linda Little	DEV Engineer	77%	

Want happy and productive workers? Enjoy the best of both worlds by distributing the workload across your team. Team Stats gives you an inside look at who is over-utilized and who has additional capacity to relieve some of the workload.

Team Stats

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Marie Williamson	QA Engineer	90%	
Norma Stanley	DEV Engineer	80%	
Elizabeth Fisher	Customer Support Engineer	79%	
Linda Little	DEV Engineer	77%	

Team Stats is also much more than just worker capacity. Now you can discover the true meaning behind the data.

High Utilization? Consider this...

- Possible burnout
- Flight risk
- Time management training
- Refinement of processes

Low Utilization? Consider this...

- Efficient & under challenged
- Lack of training
- Unclear expectations
- Job dissatisfaction

A man in a suit and headphones is sitting at a desk, looking down at a laptop. He is wearing glasses and has a beard. The background is a blurred office setting. The text '90 DAY CHALLENGE' is overlaid on the image in a large, white, sans-serif font.

90 DAY CHALLENGE

Transform your team into a happy, efficient, high achieving all-star cast in 90 days. Try it!

First 30 days. Set the foundation.

Involve your team with setting the 90-day challenge goals.



BOOST WORK TIME

A fast way to boost productivity is to ensure your team meets basic work time requirements. Shoot for 70%, 75% or 80%? It's your call!



LIMIT PRIVATE TIME

Work to keep team Private Time less than one hour per day, per person. Encourage team to reduce Private Time during work hours.



Fine tune your team's time by day 60.



IMPROVE CORE TIME

Once overall Work Time is within expectations, work to improve your team's Core Time average by X%.



INCREASE FOCUS TIME

Now set a target to increase your team's Focus Time. *By how much?* Let them decide!



90 days to a better work life balance.



BALANCE TEAM EFFORT

Focus on improving your bottom 20% and mid 60% utilization within two hours of your top 20%.

Observe the impact after 90 days.



CELEBRATE

Nice work! Revisit achievements. Thoughtful recognition for a job well done is one of the best ways to keep your team happily engaged.



A man in a red sweater and a woman in a white t-shirt and glasses are high-fiving in an office. A laptop is visible on a desk in the foreground.

PRO TIPS

See how other managers like you are leading their teams, combining data and modern leadership strategies.

Lead with intention



Regularly looking at your team's Vue work data keeps you **informed** and ready to act.

- Start your day by viewing your Dashboard to ensure your team's efforts aligns with your expectations
- Begin projects by looking at Utilization to confirm your team's available capacity
- Set Work and Core Time and goals to help your team do their best work
- Share weekly work reports with your team such as the Work Activity Analysis report*

***Never share individual user level data to the team**

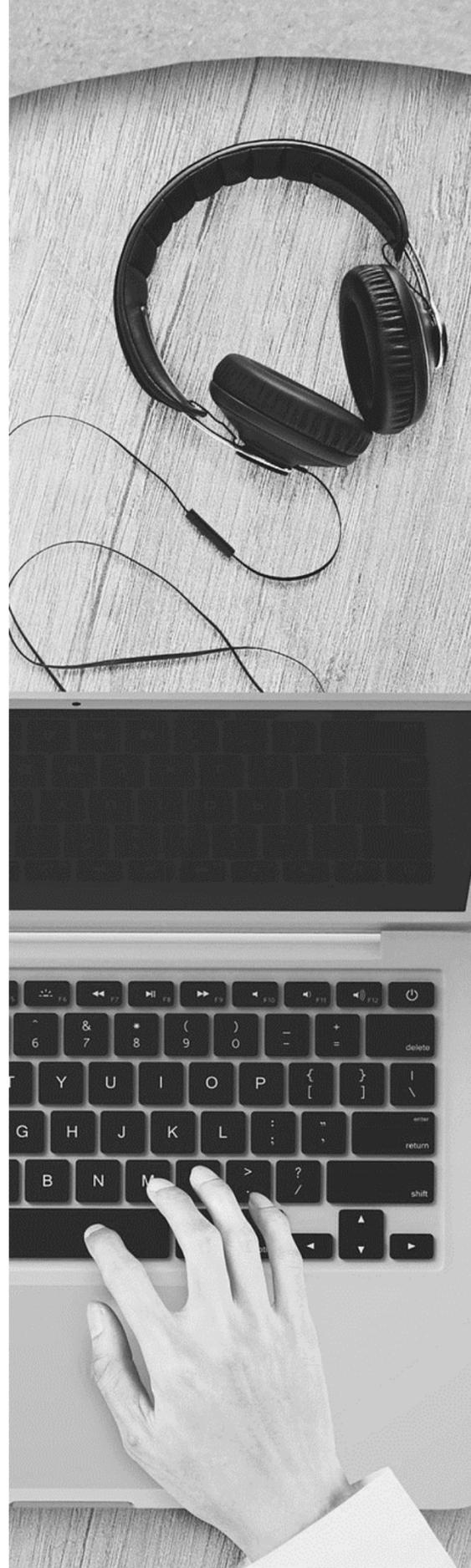
Motivate your team with the right work



Motivated workers are more engaged and produce higher **quality** work giving you more time to focus on your team's strategic vision.

- Delegate more challenging tasks to your champions
- Move less challenging tasks to more inexperienced team members
- Encourage your champions to build leadership skills by mentoring others
- Model your top performers by reviewing their work patterns with the team

Tame wild meetings



Meetings can be your team's top **productivity** killer. Here's how to prevent them from running wild:

- Schedule team meetings and one-on-ones during non-focus hours
- Shorten meetings to compress time which creates focus
- 20-minute huddles can reduce the need for some scheduled meetings
- Start and end meetings on time

Celebrate wins



Encourage the behavior you want to see by **celebrating** achievements.

Finally, a way to discover those priceless above and beyond moments you knew your team was capable of.

- Set a Notification to alert you when workers achieve a set activity, application or work time goal
- Recognize workers who show high business impact

FAQS

Answers to your frequently asked questions.

HOW DOES SAPIENCE VUE CAPTURE MEETINGS?

If a user is away from their system and there is an accepted calendar meeting at that time, that time is allocated as Meeting Time.

WHAT IF A WORKER IS USING MULTIPLE SCREENS OR TABS?

Sapience tracks the information and time spent only in the active window.

HOW ARE UNSCHEDULED (AD HOC) MEETINGS CAPTURED?

Team members can manually account for this time if manual accounting is allowed by your organization.

WHAT HAPPENS IF AN EMPLOYEE IS ABSENT?

No activity will be captured. There is no need to manually capture this.

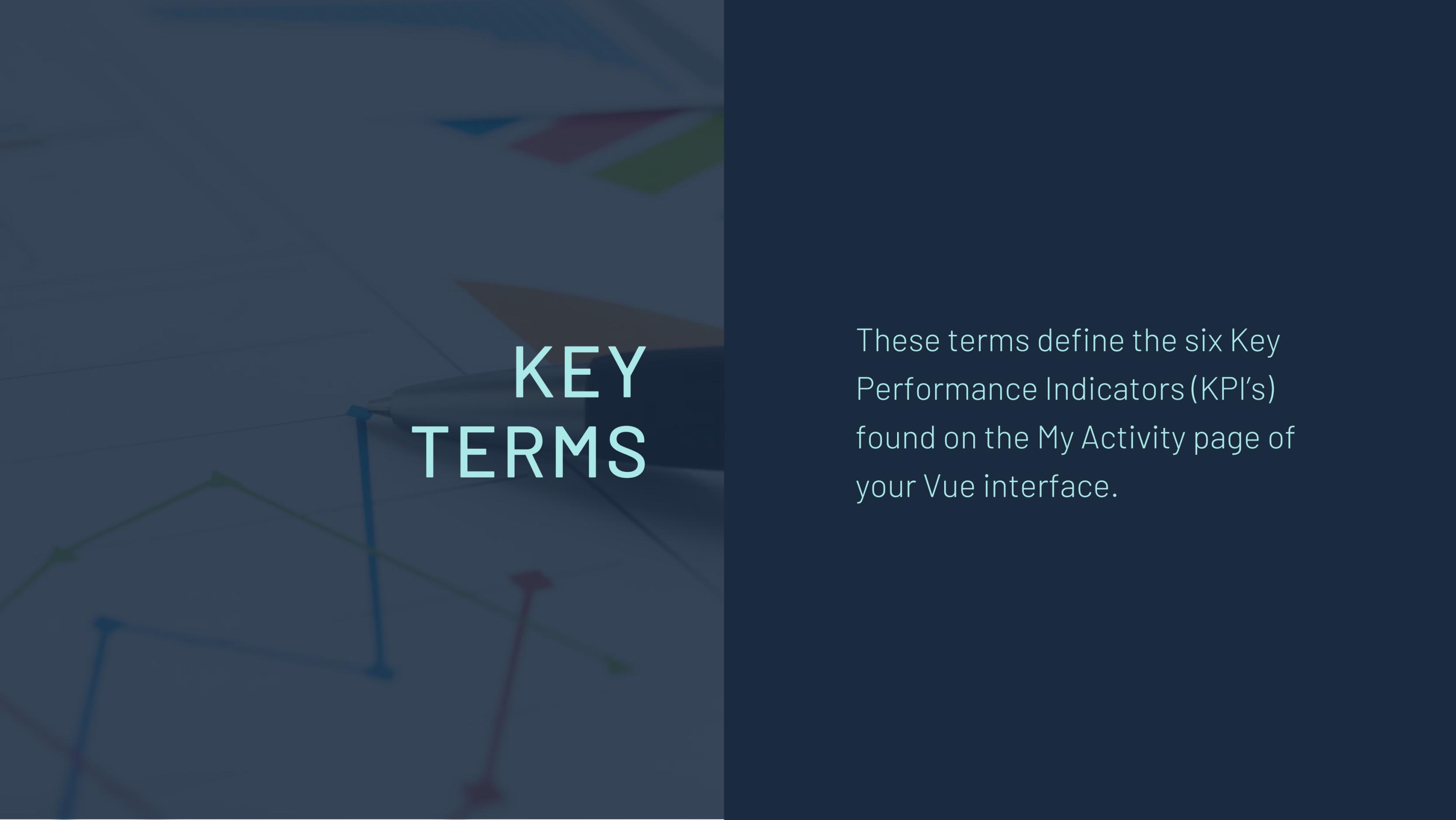
WHAT IF A WORKER HAS PRIVATE OR UNACCOUNTED TIME?

It is normal for employees to have some private and unaccounted time. Leaders are responsible for communicating expectations to employees.

WILL I BE ABLE TO SEE AN EMPLOYEE'S PRIVATE TIME DETAILS?

To protect an employee's personal information, personal browsing is shown as Private Time.

Additional FAQ's can be found in the FAQ document located in your Manager Kit



KEY TERMS

These terms define the six Key Performance Indicators (KPI's) found on the My Activity page of your Vue interface.

WORK TIME

Total accounted time spent working both on-PC and off-PC.

PRIVATE TIME

On-PC time spent on URL's and applications not mapped as work.

UNACCOUNTED TIME

Inactivity of five minutes or more on computer and no meeting is detected.



FOCUS ON
THESE KEY
PERFORMANCE
METRICS FIRST

CORE TIME

Time spent on core work activities that are primary to a worker's job role.

FOCUS TIME

Time spent continuously on core activities for more than twenty minutes.

MEETING TIME

Time spent in scheduled meetings.

**NEXT, FINE TUNE
YOUR TEAM.**

