AvePoint

Accelerate Your Line of Business with Microsoft Teams

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Microsoft Partner

Microsoft

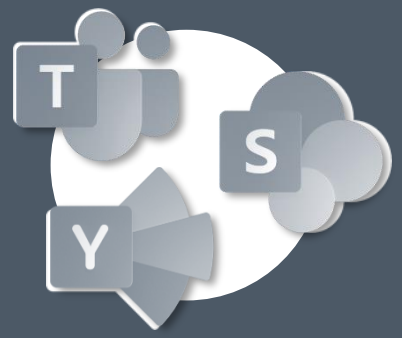
Gold Application Development
Gold Cloud Platform
Gold Cloud Productivity
Gold Collaboration and Content

Accessible content is available upon request.

The Day

9:00 am: Kickoff

12:00 pm: Lunch Break



Activity: All About *Teams*work

Presenter Activity

Describe one example of your Office 365 "Teams"work Success Story

Individual Activity

Write down your largest concern for Office 365 and Teams adoption

Group Activity

Consolidate your adoption concerns, Identify top TWO

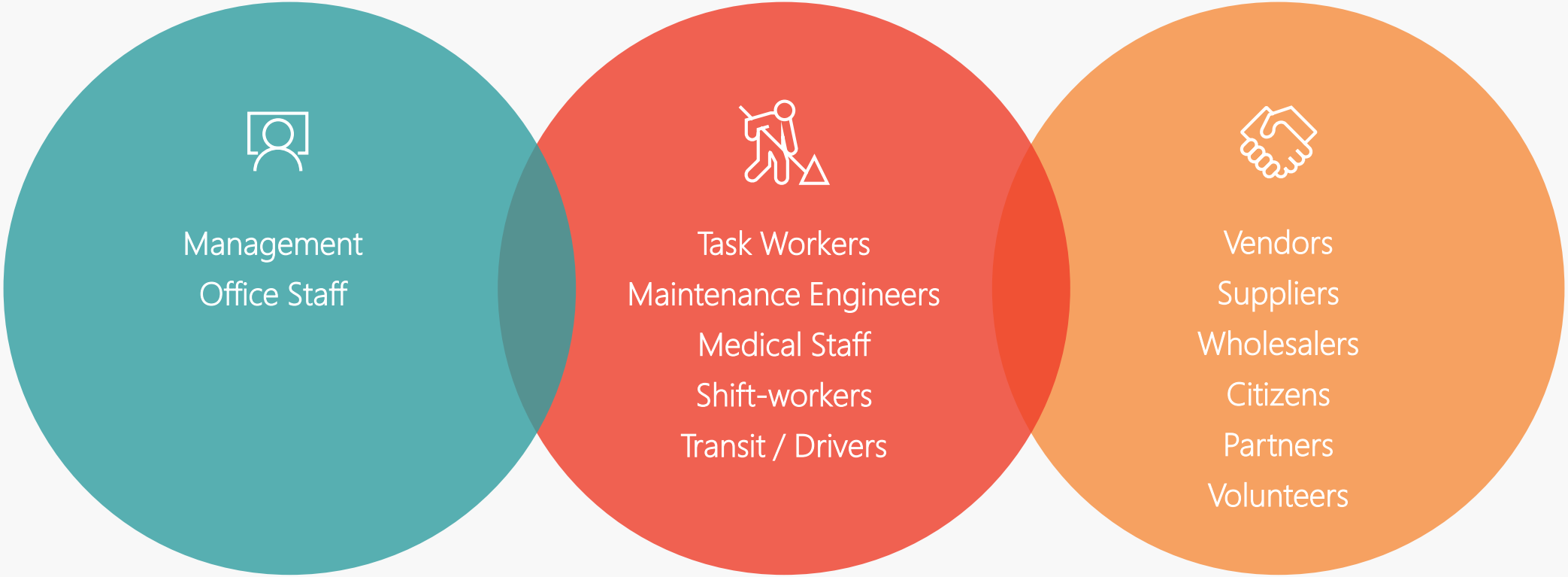
Draw these on the flip charts with no words

Agenda

- The New Culture of Teamwork
- Centralize Work in a One Stop Shop
- Enable Business Solutions
- Make it Easy to Do the Right Thing
- Drive Sustainable Adoption

The New Culture of Teamwork

Today's modern workforce



Information Worker

Firstline Worker

Value Chain

Teamwork

The landscape has changed

(US Government edition)

5

Generations Co-working

OPM lists five generations supporting government work together, spanning 80 years of technological innovation

Diverse workforce

People have different expectations, preferences, skillsets and abilities

Telework is here!

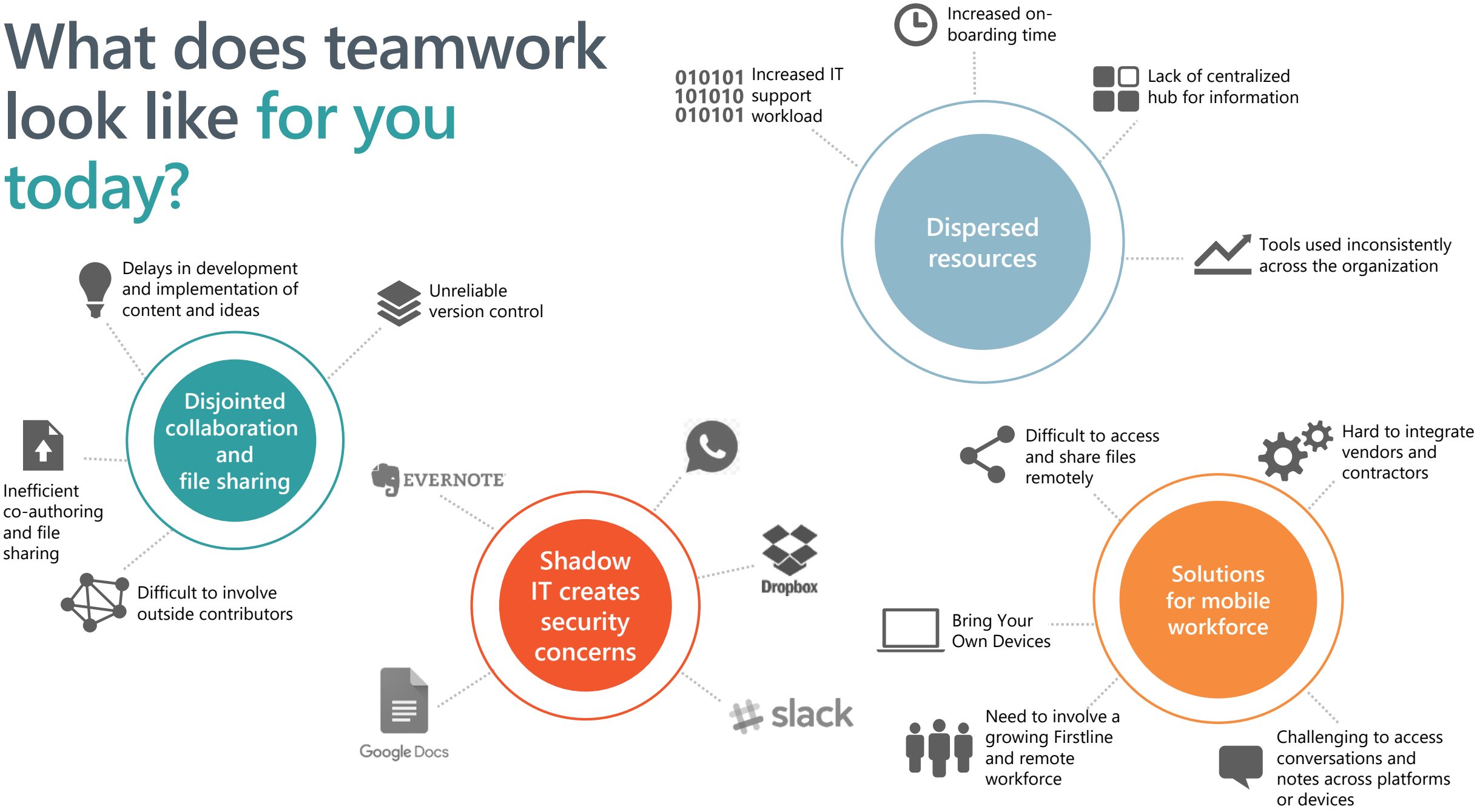
49% of federal workers are eligible for telework today

2018 OPM Status of Telework in Federal Government Report

Team-based Collaboration

80% of employee time is spent “collaborating”

What does teamwork look like for you today?



Teamwork in Microsoft 365

Inner Loop

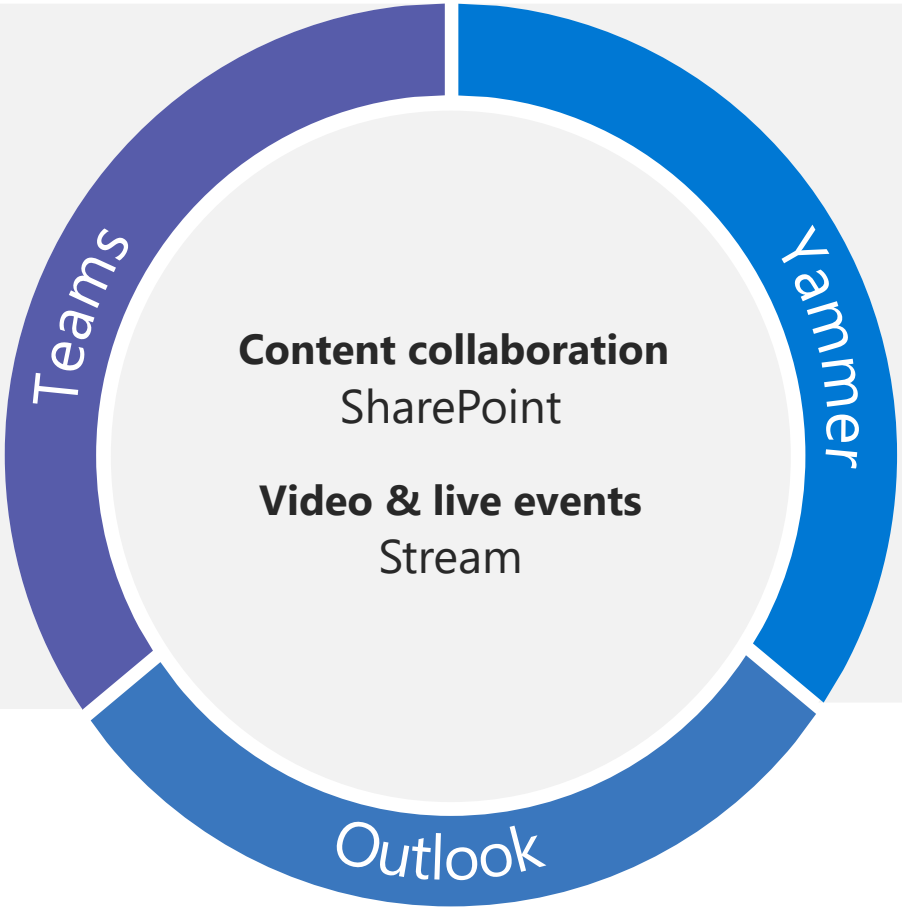
People you work with regularly on core projects

Examples:

Team meetings & communication

Event planning

Sales Team planning



Outer Loop

People you connect with openly across the organization

Examples:

Corporate communications

CEO Town Hall Meetings

Employee Interest Groups

Email

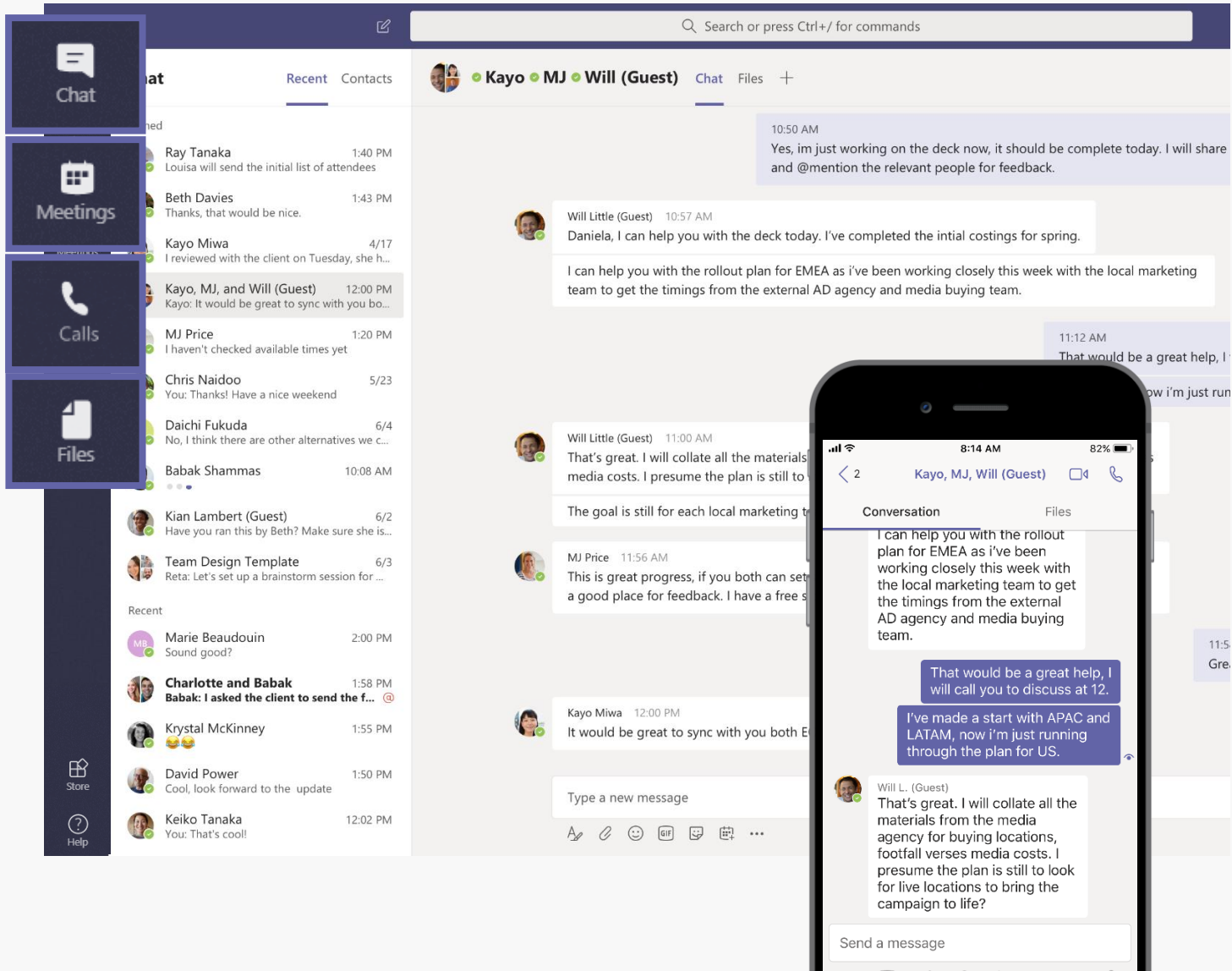
Pervasive availability. Targeted communications.

Microsoft Teams

The hub for teamwork in Microsoft 365

- Persistent 1:1 & Group Chat
- Enhanced Collaboration
- Enterprise Communications
- Customize & Extend

Built with the enterprise-grade security and compliance our customers rely on



Communicate through chat

Communicate across geographies, languages and organizations

Share information in an open and transparent way with **threaded, persistent channel discussions**

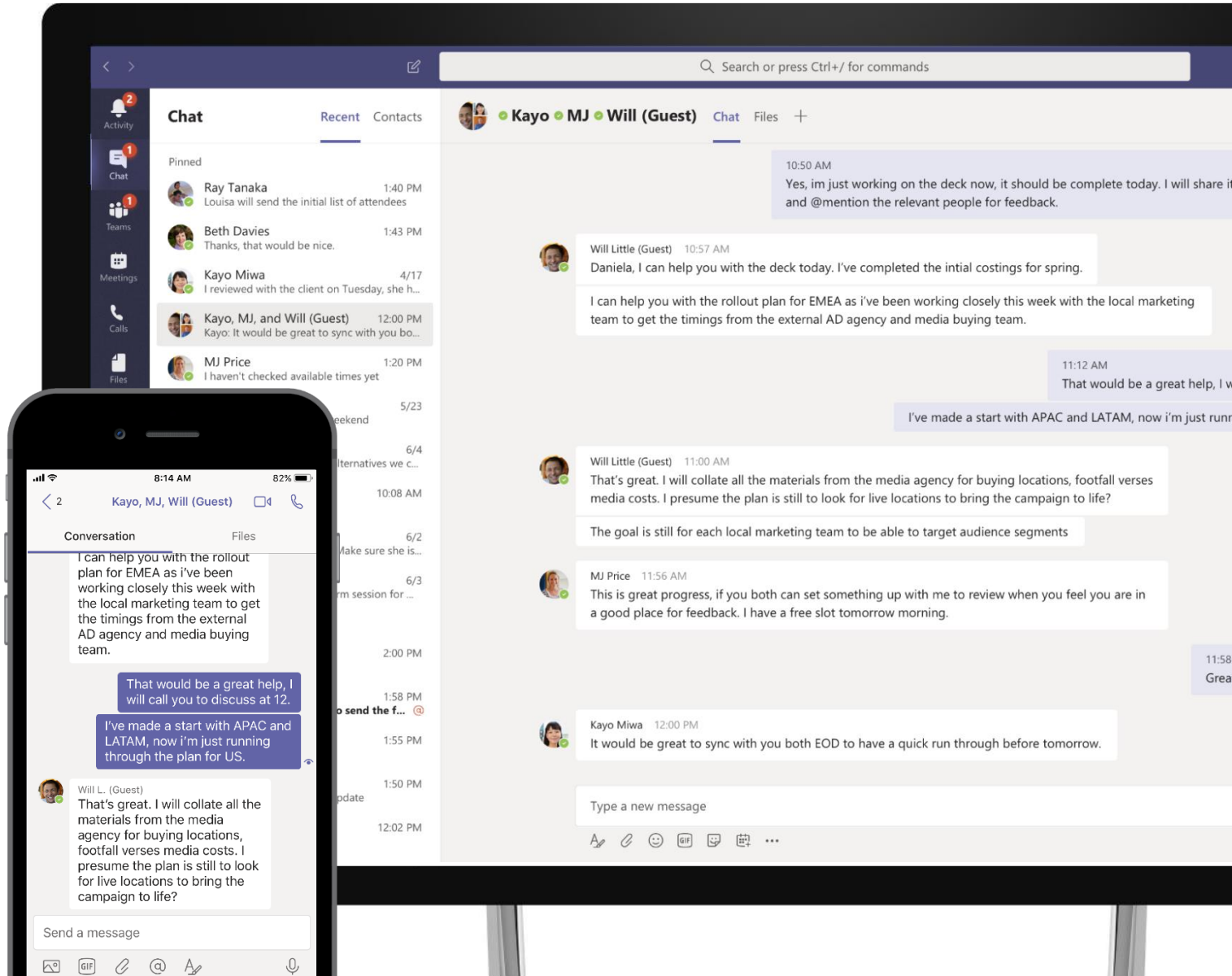
Manage private conversations with new **secure private channels**

Stay in sync with **1:1 or group chats**

Communicate across geographies, languages, and organizations with **guest access, federation, and translation**

Add some fun to your conversations **with gifs, memes, stickers & emojis**

Available across **mobile, desktop, browser**, and a wide range of devices



Communicate through meetings

Communicate from anywhere with an intelligent cloud meeting solution

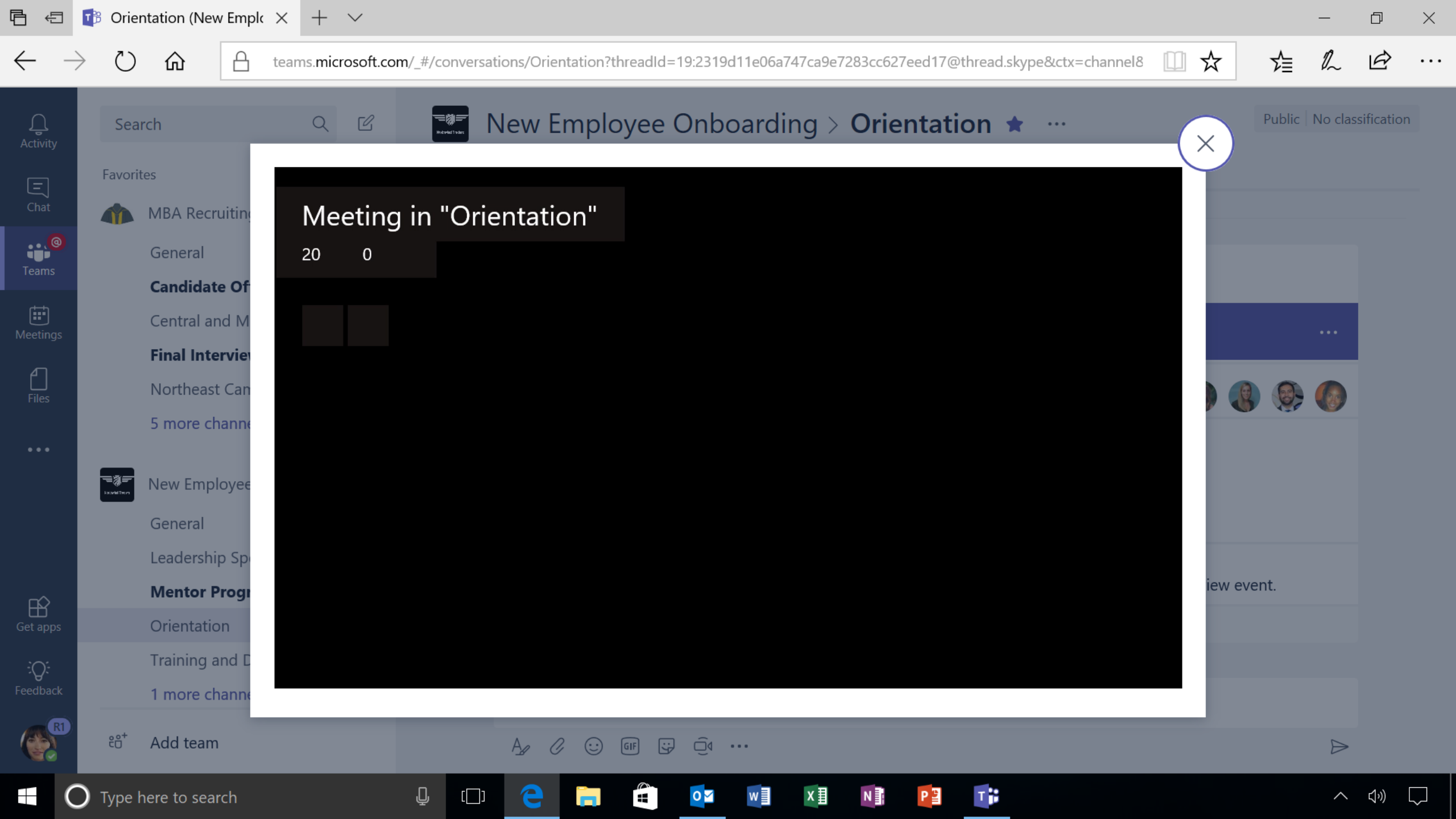
Stay connected with an **intelligent meeting solution** using video, content sharing, digital whiteboard, notes and chat

Engage in **all types of meetings**—spontaneous, scheduled, external and large-scale live and on-demand events

Make meetings more effective by having meeting history and **relevant content at your fingertips**

Search through meeting content with cloud recordings and automatic **transcription and translation**

Join from a **range of platforms and devices**, including desktop, browser, mobile, and meeting room devices


Orientation (New Empl
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Activity
Chat
Teams
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Files
Get apps
Feedback
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Orientation
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1 more channe
Add team
New Employee Onboarding > Orientation
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Meeting in "Orientation"
20 0
iew event.
Type here to search

Communicate through calling

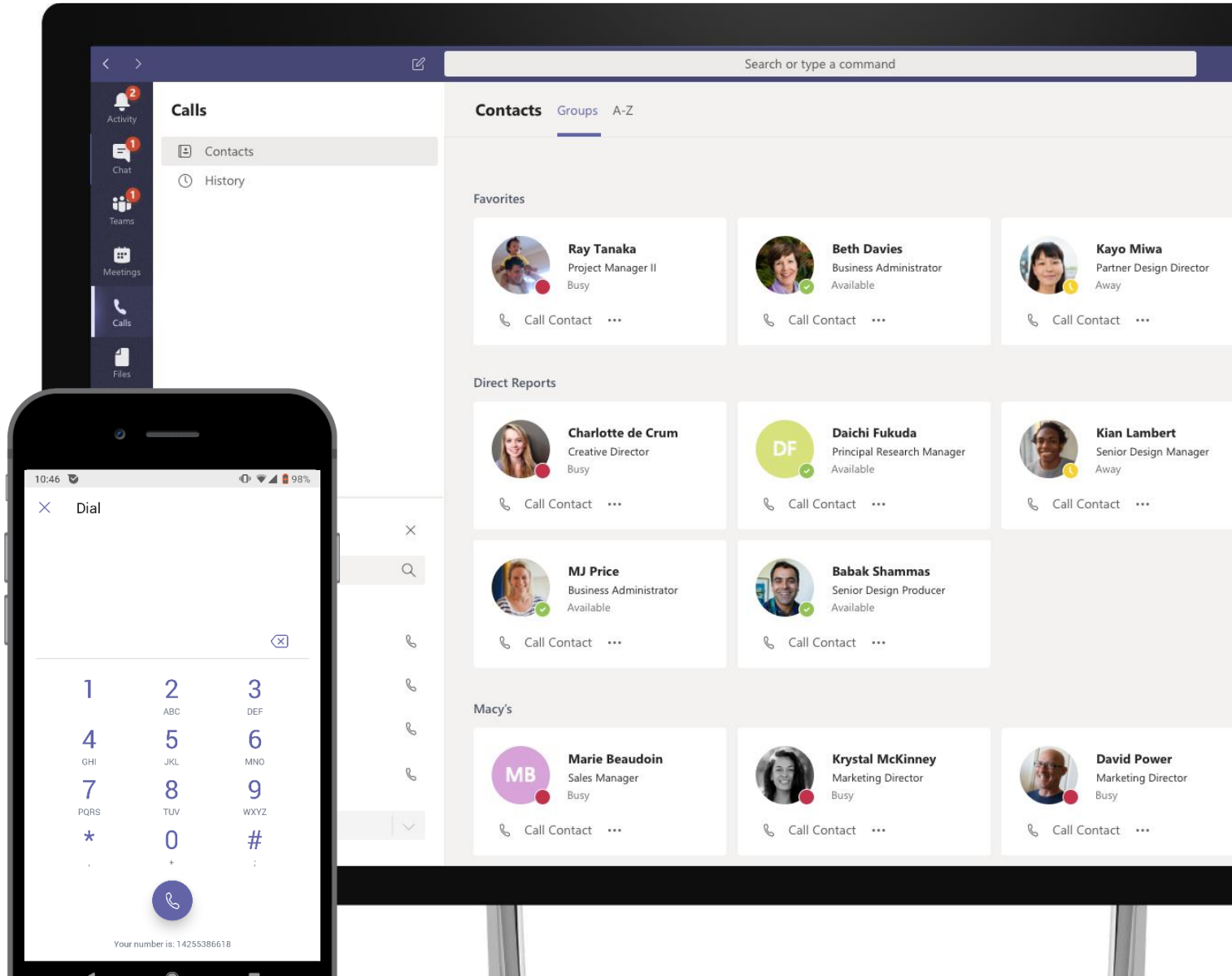
Connect with anyone through Phone System, Calling Plans, or Direct Routing

Provide software, service and phone lines for each user with **Microsoft Calling Plans**

Keep your voice trunks and configure as needed with **Microsoft Direct Routing**

Leverage the **latest key calling features** such as Cloud Voicemail, improved delegation, Busy on Busy, updated Cloud Auto Attendant, Call Park, Group Call Pickup, and Shared Line Appearance

Future support coming soon for Location-Based Routing, Dynamic e-911, and Call Recording



Collaborate with Office 365 apps

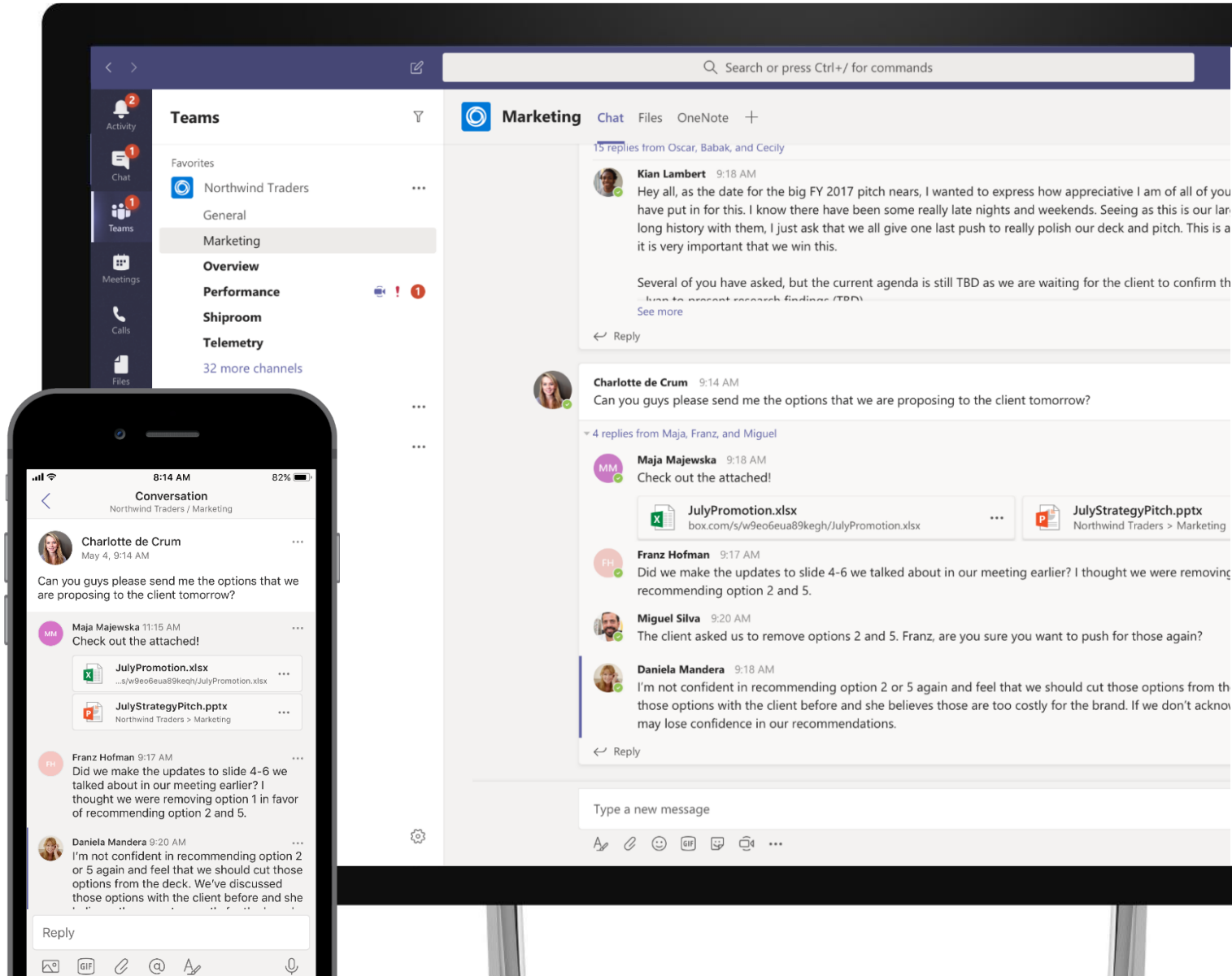
Quick access to the apps you love

Share and co-author Office documents from within Teams app

Reduce context switching with **built in access to Office 365 apps**—SharePoint, OneNote, Power BI, Planner, Flow and PowerApps

Search across people, files and chats to find what you need—**leveraging intelligence from the Microsoft Graph**

Keep the whole team in the loop with **email integration and notifications**



Work with confidence

Get built-in security, compliance and manageability from Office 365

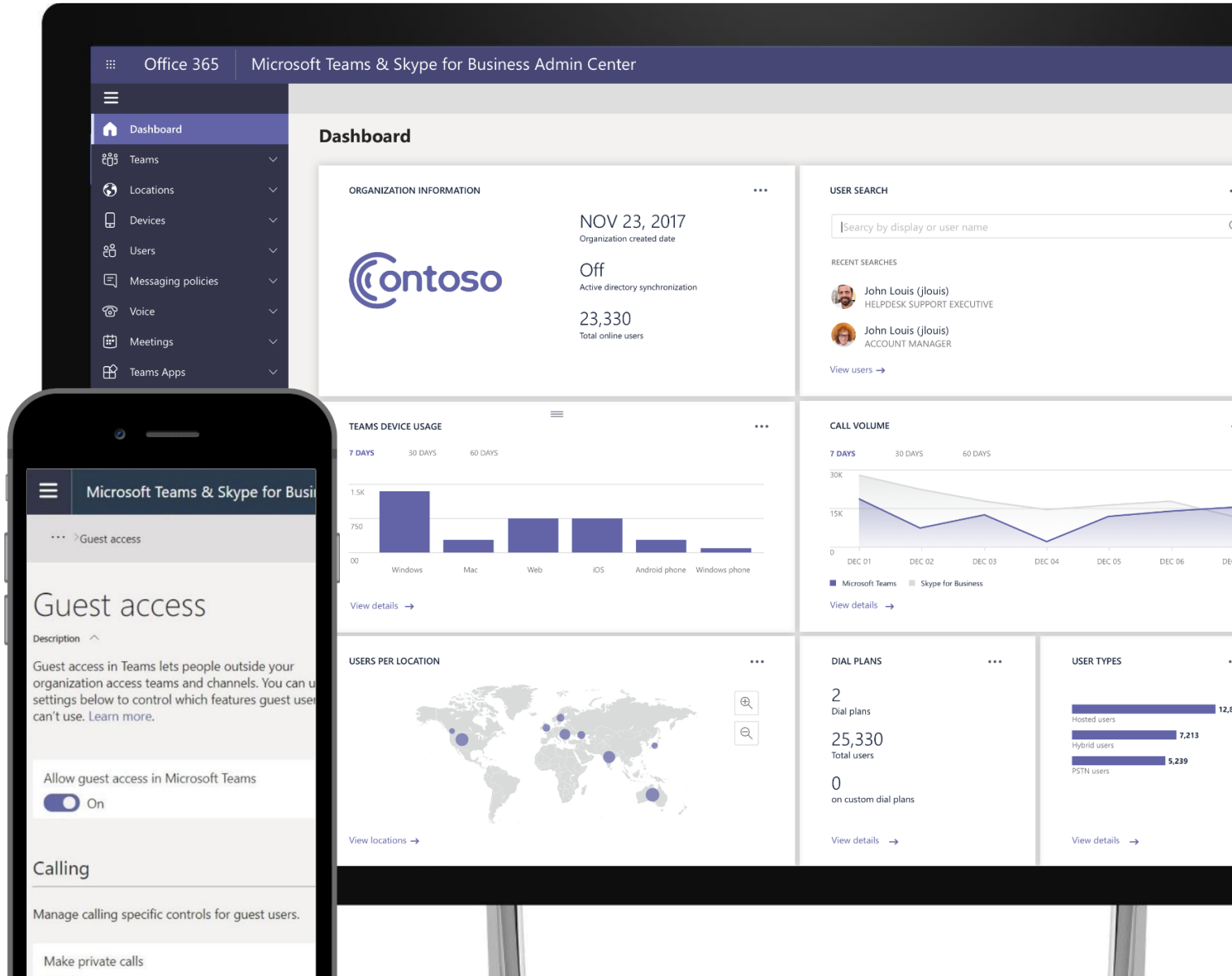
Global hyper-scale cloud, including ability for local data residency and global peering points for meeting join

Compliance leadership with EU Model Clauses, SOC 1 and 2, HIPAA, GDPR, and more

Built-in information protection, including eDiscovery, Data Loss Prevention even in chats & conversations, Information barriers, legal hold and audit

Multi-factor authentication for enhanced identity protection and secure guest access

Manage all aspects—users, usage and settings—In a **single admin experience**



External/Guest Access

Anyone with an Azure Active Directory (AAD) account can be added as a guest in Teams.

Guests …

Can have any email account (Work accounts e.g. Office 365)

Accounts are added and securely managed within Azure AD through Azure AD B2B Collaboration

IT admins can quickly and easily view, add, or revoke a guest's access to the host tenant

Are included as part of your Office 365 subscription at no additional cost

Are subject to Azure AD & Office 365 service limits

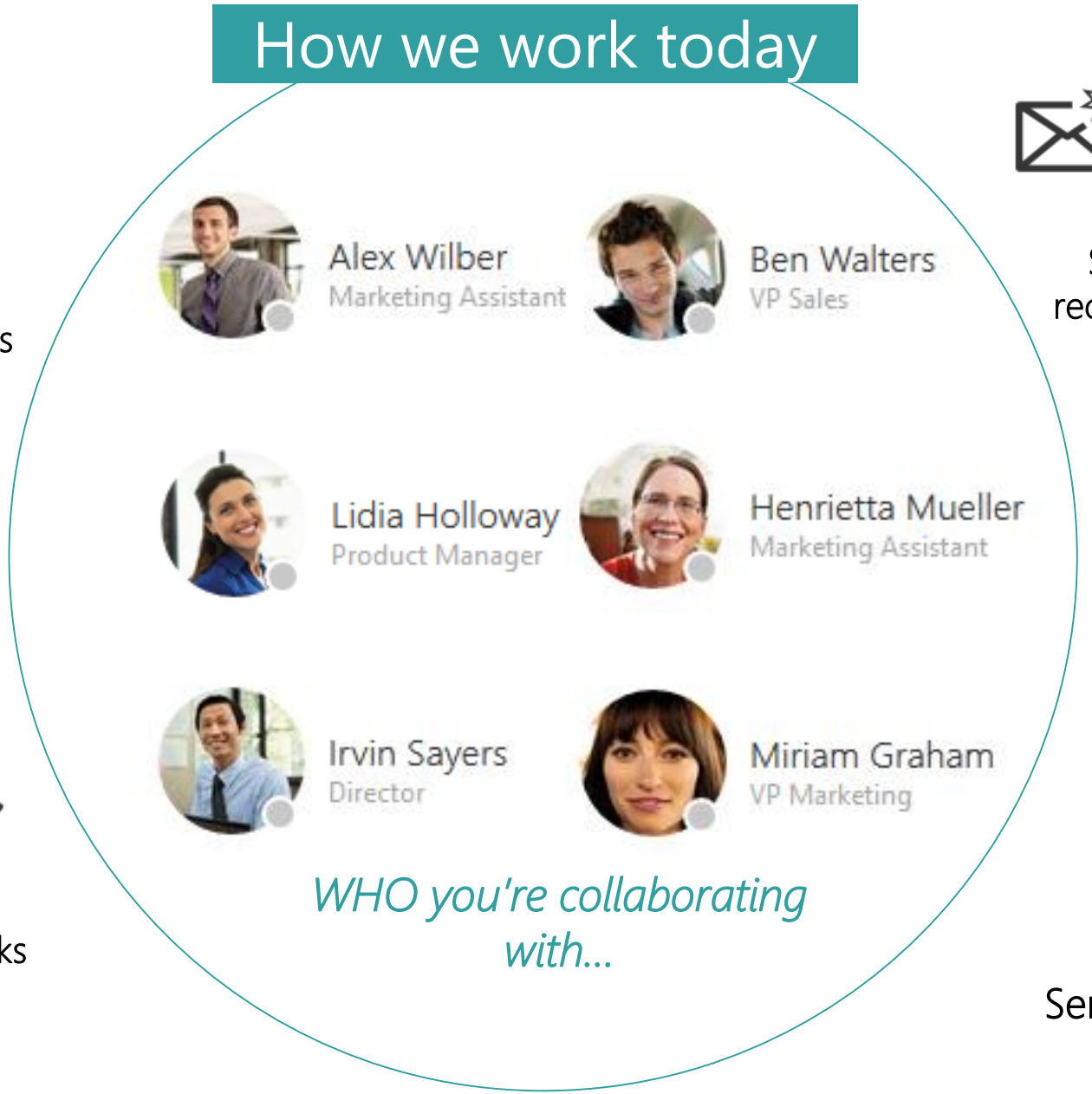
Guest Access Capabilities

Capabilities	Teams User	Guest User
Create channels	X	X
Participate in a private chat	X	X
Participate in a channel conversation	X	X
Post, delete, and edit messages	X	X
Share a channel file	X	X
Share a chat file	X	
Add apps (tabs, bots, connectors)	X	
Create tenant-wide and teams/channels guest access policies	X	
Invite a user outside the Office 365 tenant's domain		X
Create team	X	
Discover and join public teams	X	
View org chart	X	

Note: Office 365 admins control the features available to guests.

Centralize Work in a One Stop Shop

How we work today



Share Files

Plan meetings and events

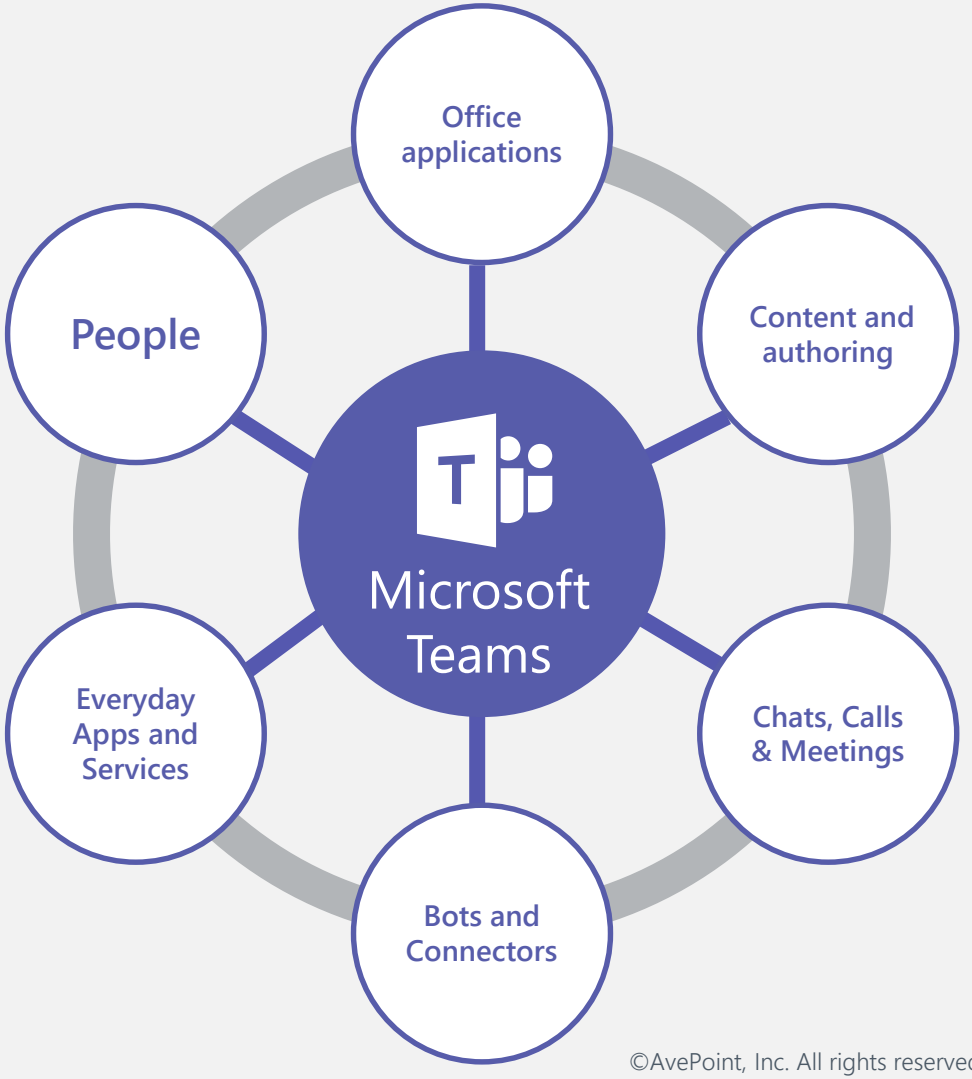
Track tasks

Send and receive emails

Chats and conversations

Serendipitous collision

Microsoft Teams – The Hub for Teamwork



Communicate: Chat, calls & meetings for today's teams

Collaborate: Deeply integrated Office 365 apps

Customize & Extend: 3rd party apps & existing systems

Work w/ Confidence: Enterprise security, compliance & manageability

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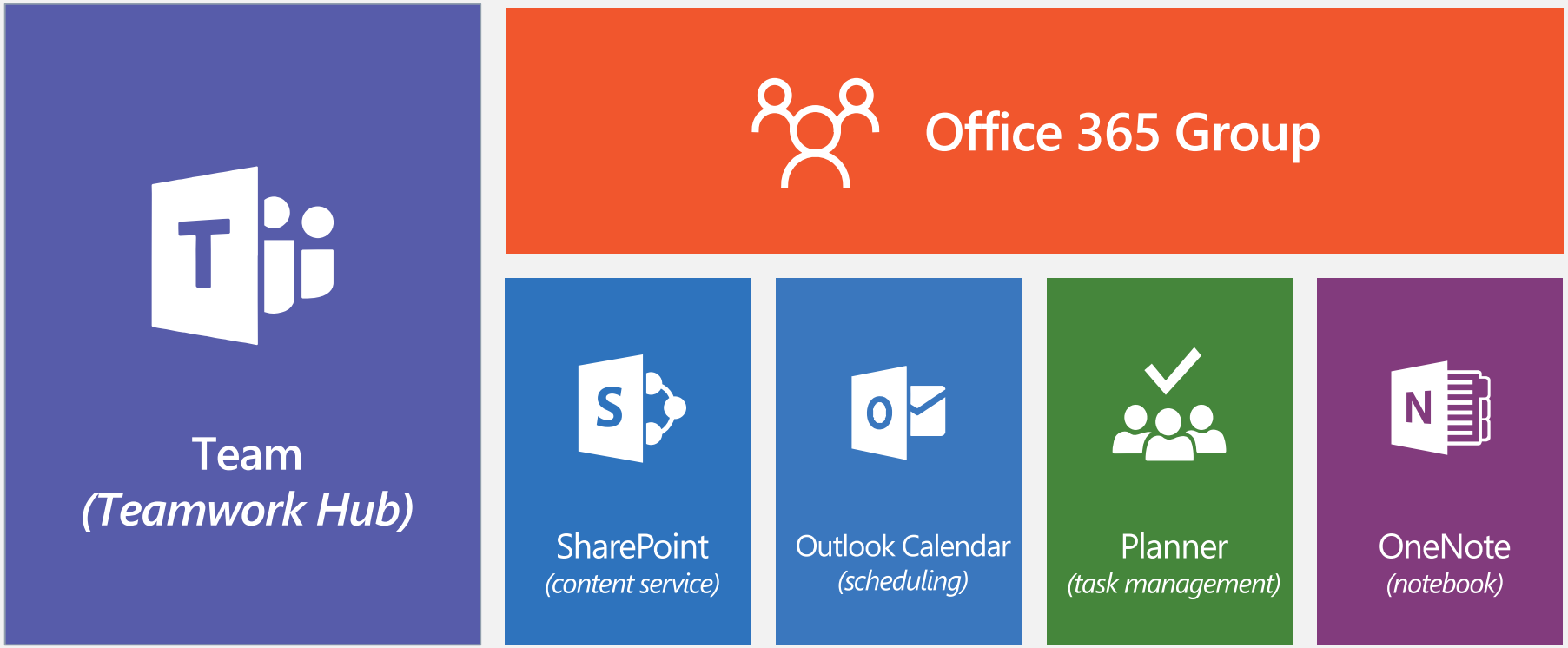
When Creating a Team …



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Office 365 Groups = Membership Service

Attributes

One identity
Azure AD is the master for group identity & membership

Federated resources
Office 365 services extend with their data

Loose coupling
Service notify each other of changes to a group

Flow

User creates new group for teamwork → Group identity created in Azure Active Directory → Group experience populated in app of choice

Apps

Azure AD

- Outlook
- Teams
- OneNote
- SharePoint
- Planner
- Dynamics CRM
- Yammer
- Stream
- Power BI

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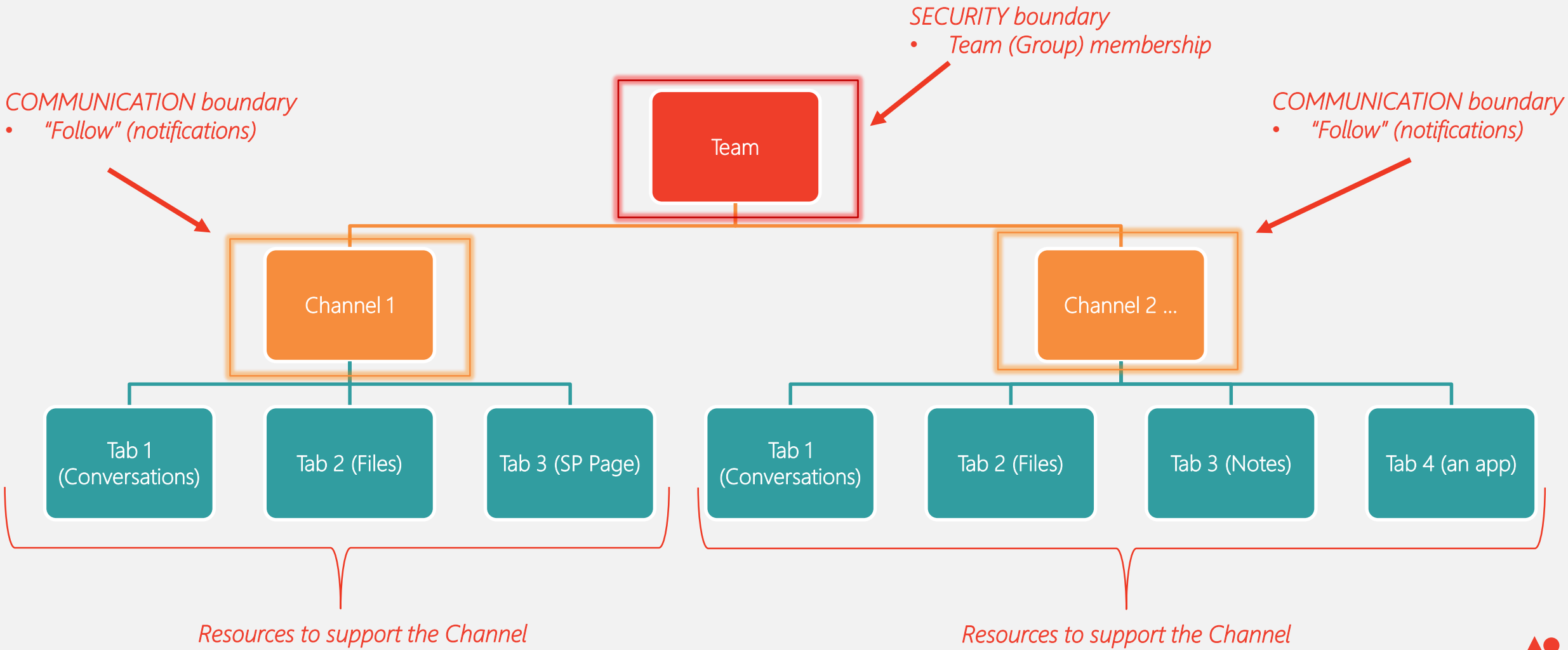
The basic shape of a Team



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Teams and Channels

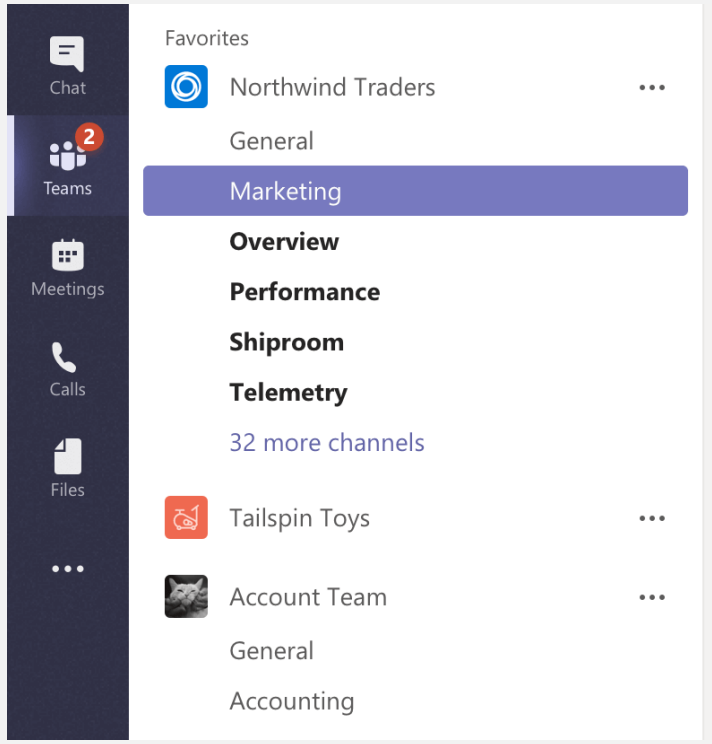
Pick a team and channel
A *team* is a collection of people, conversations, files, and tools—all in one place.

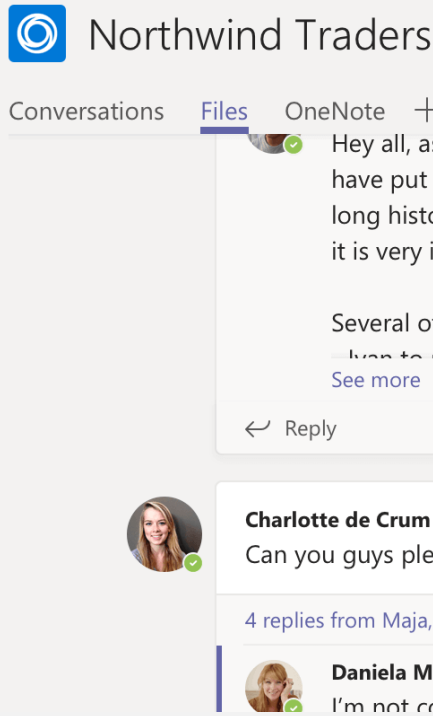
A *channel* is a discussion in a team, dedicated to a department, project, or topic.

The best way to get familiar with teams and channels is to pick a team and channel and start exploring!

1. Click **Teams** on the left side of the app and then pick a team.

2. Select a channel and explore the **Conversations**, **Files**, and other tabs.





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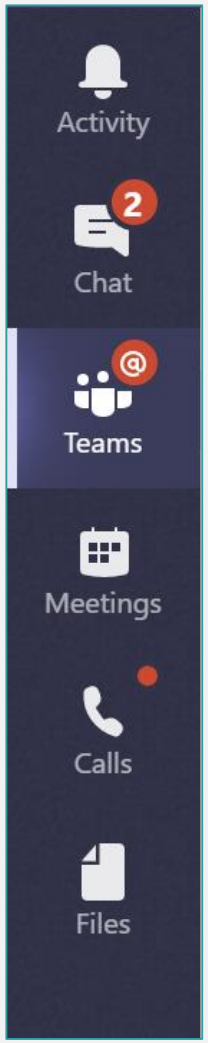
The Difference between TEAMS and CHATS



Team Conversations

- Visible to all Team members/owners
- Uploaded files go into the SharePoint folder for the Channel
- Conversation history goes into the Team mailbox for compliance needs (hidden)
- Notifications will be sent to those following the Channel + those who are @mentioned

Chats

- Visible only to those in the chat
- Uploaded files go into the OneDrive of the poster and are shared with current chat participants automatically
- Chat history goes into the participants mailboxes for compliance needs (hidden)
- Notifications will be sent to participants

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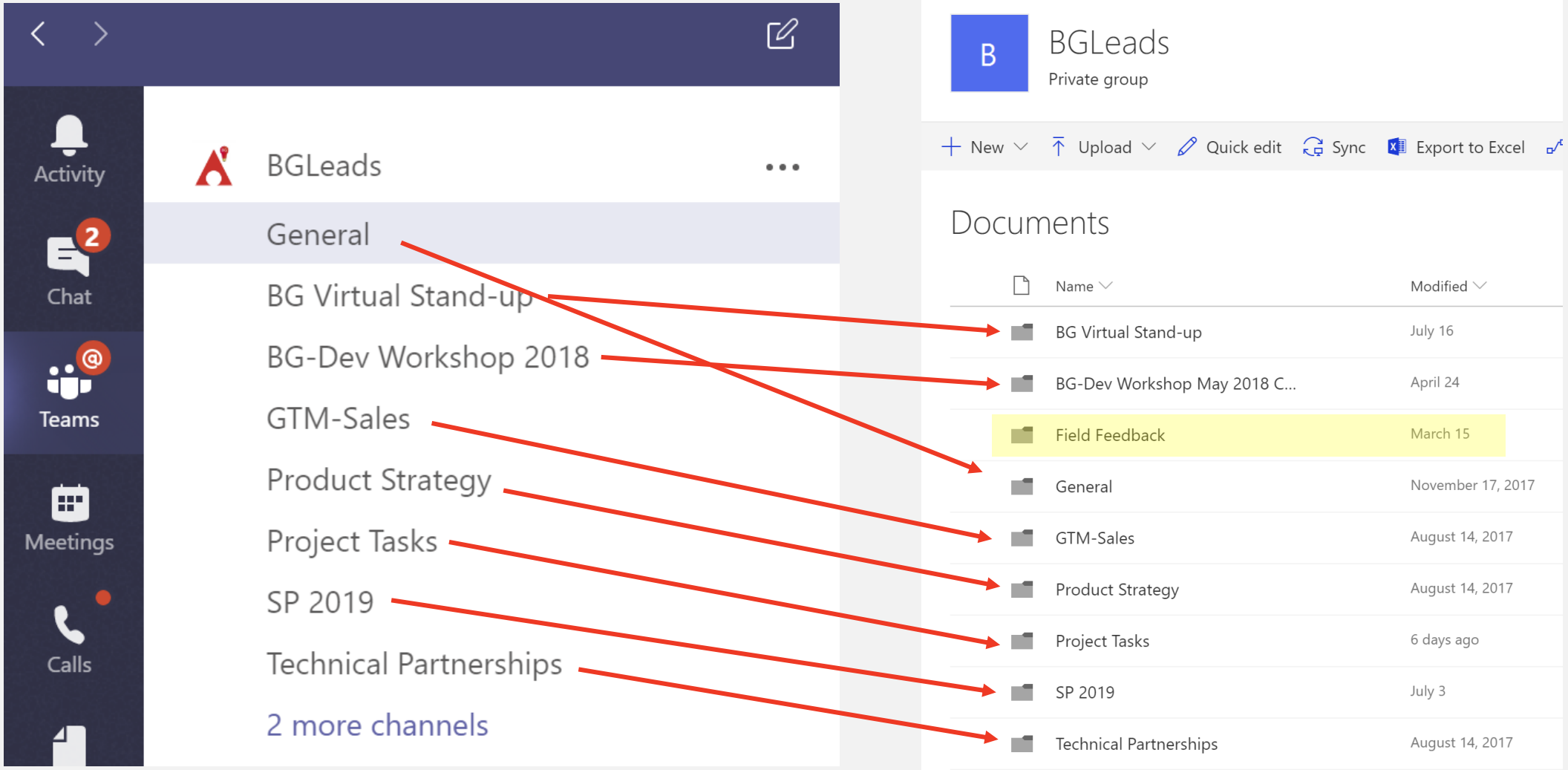
Understanding the SharePoint and Teams relationship



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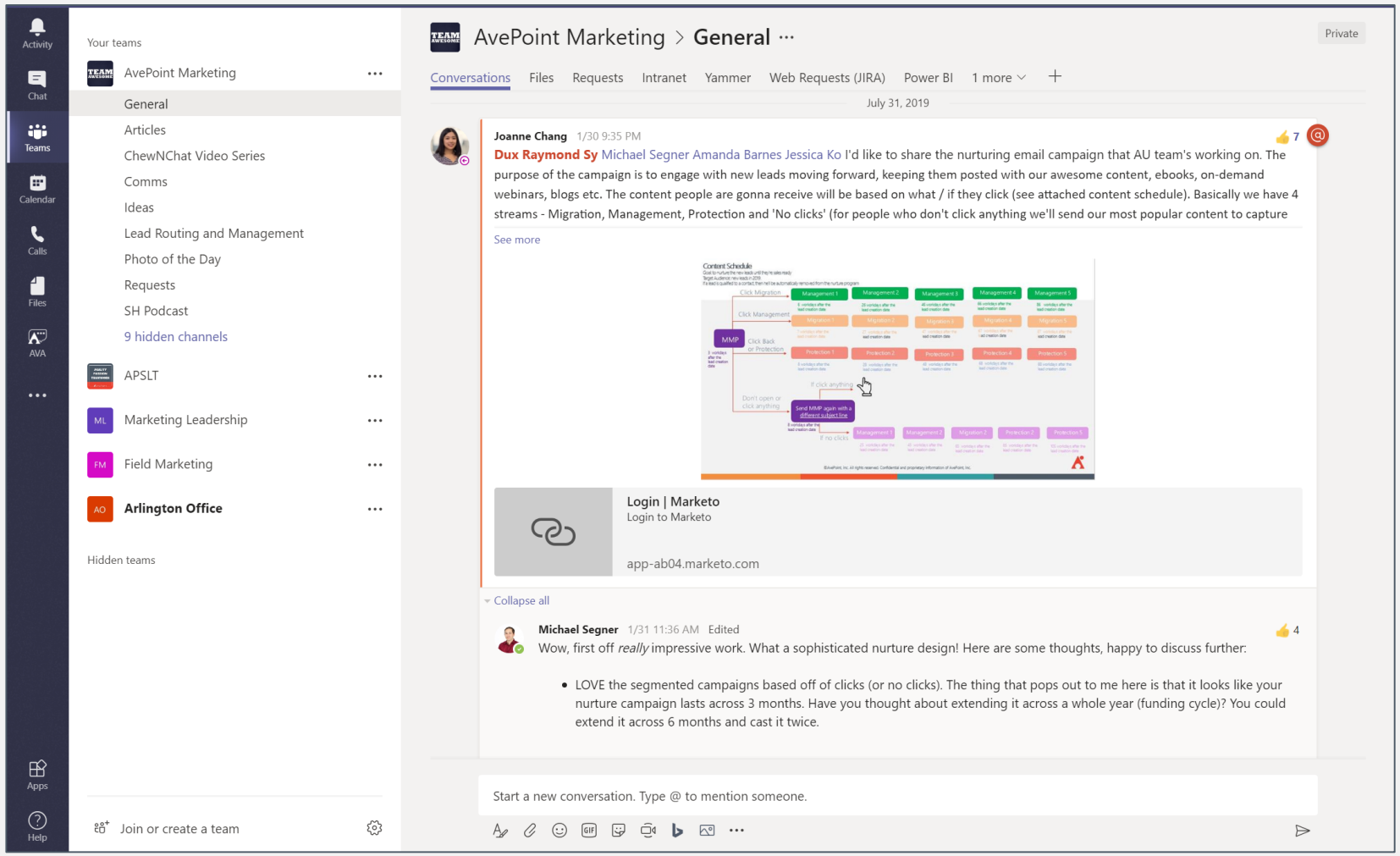
Departmental Teamwork in Teams



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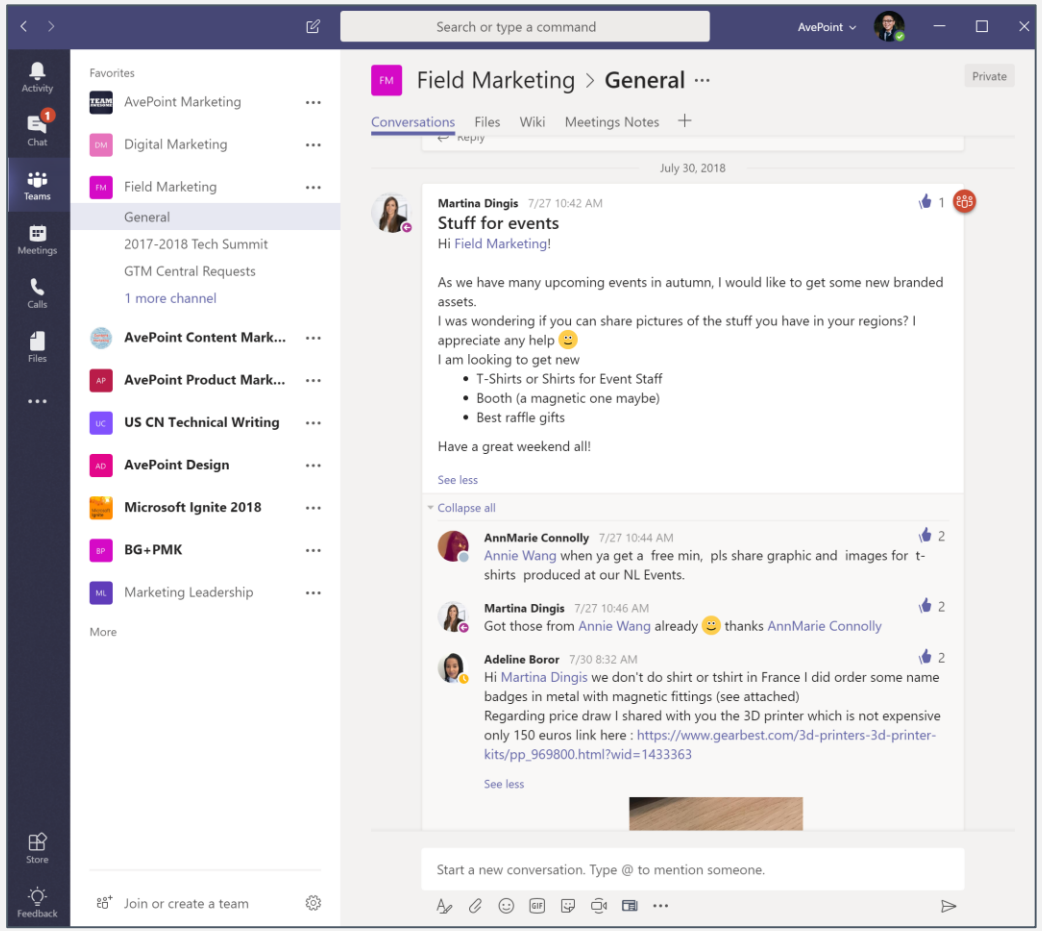
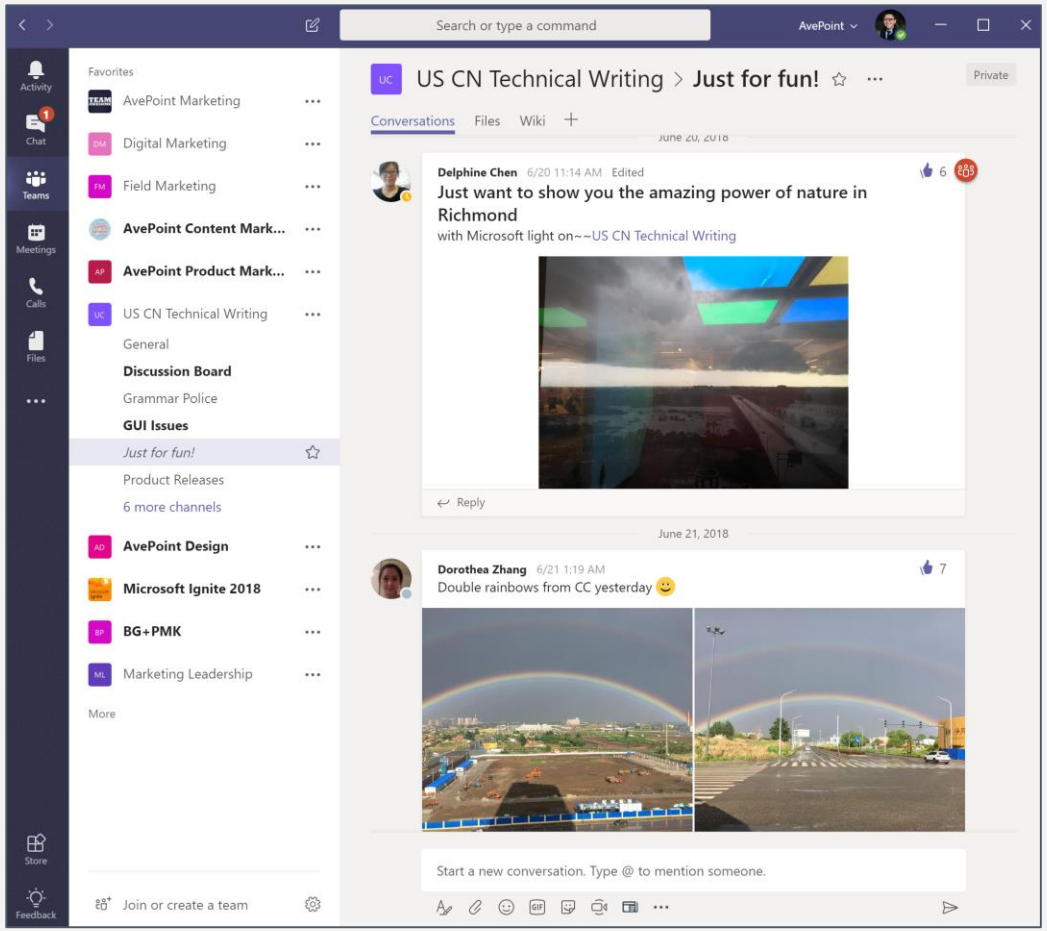
Example: Global team collaboration





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Don’t you love Reply All?

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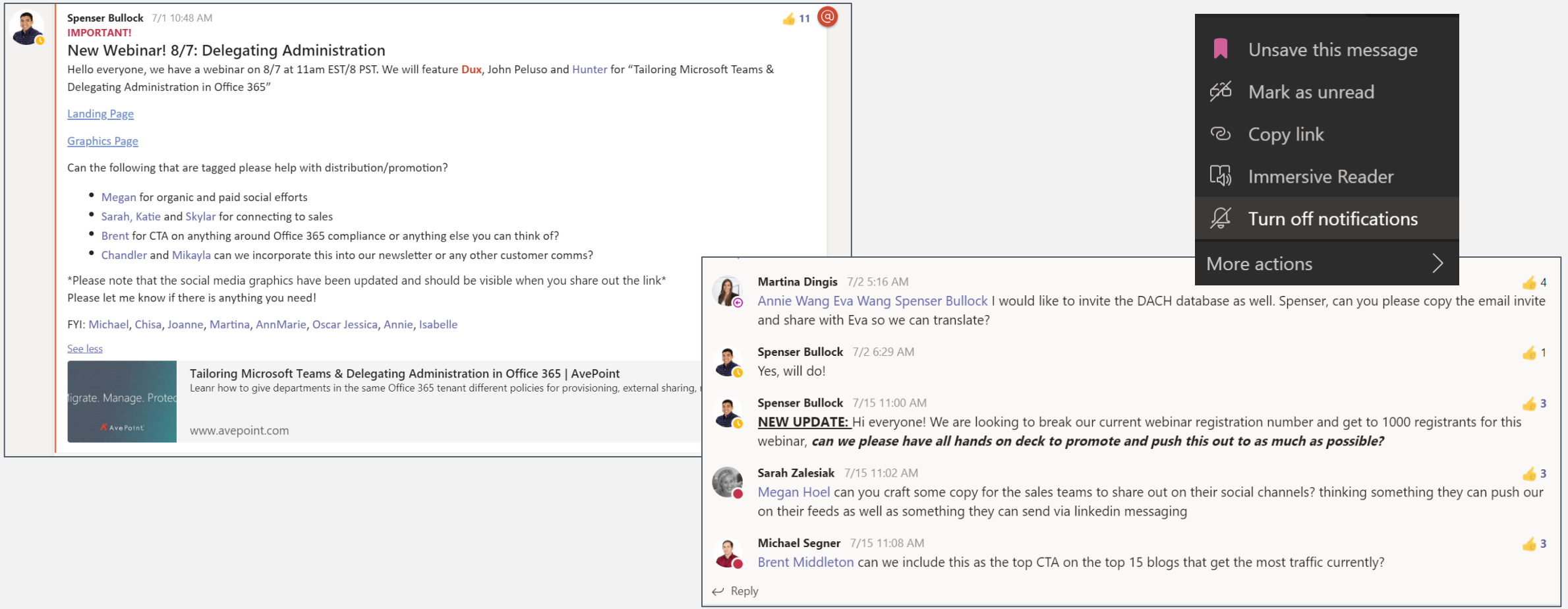
Group Communication in Teams



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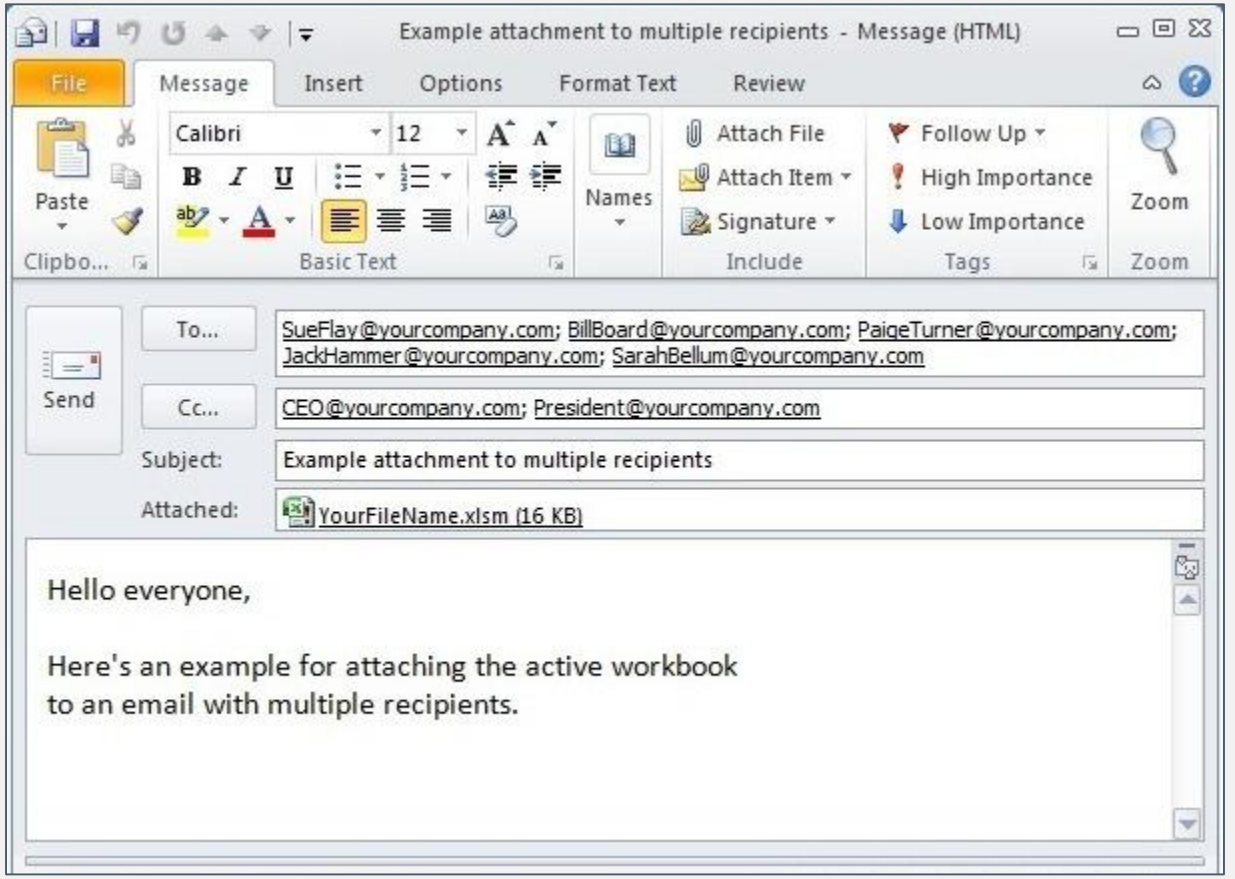
Document Collaboration via Email



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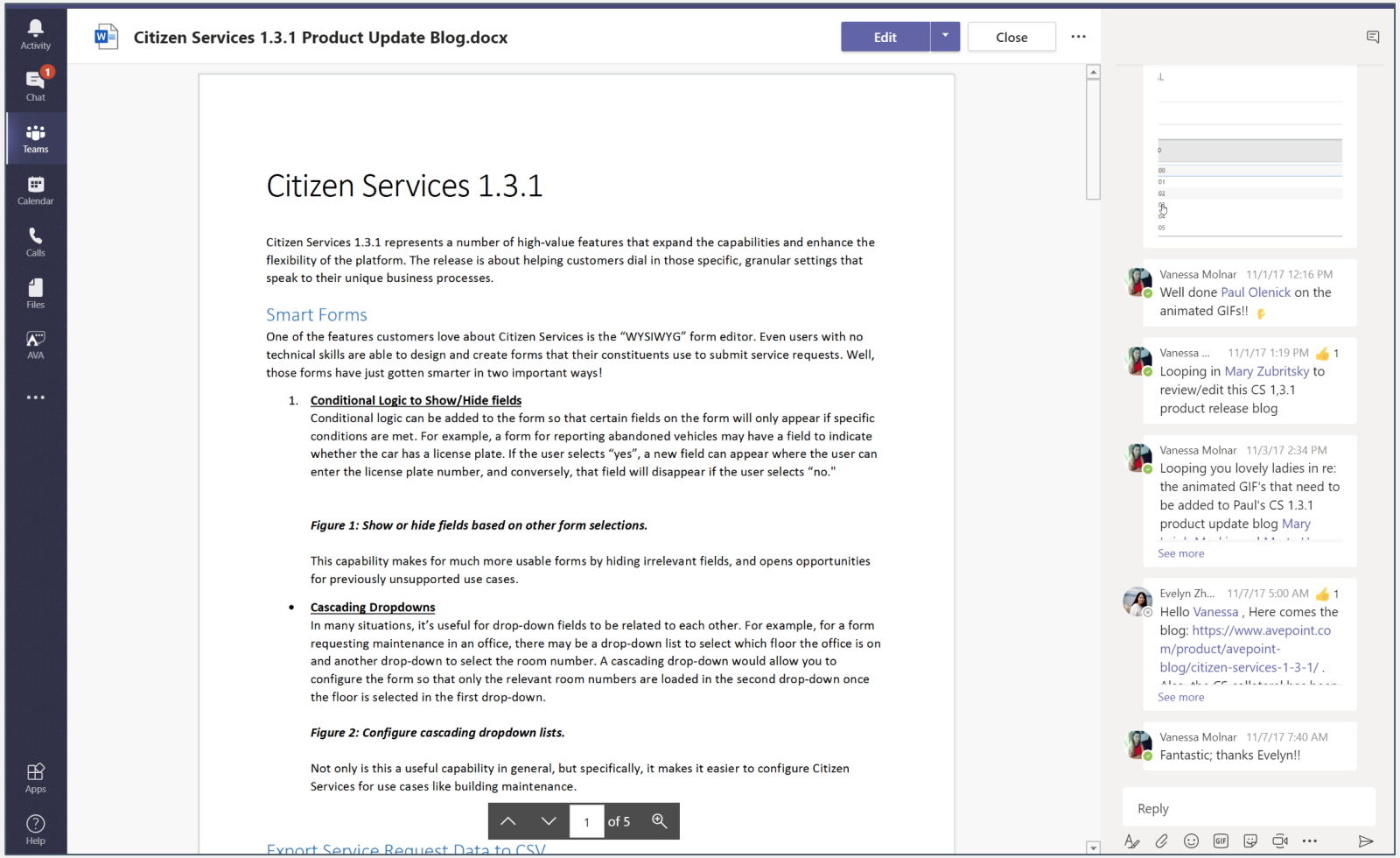
Document Co-Authoring in Teams



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Helping email addicts adjust to Teams…

Your email…

- Forces YOU to separate your inbound communication
- Requires YOU to configure complex rules to ensure relevant information is surfaced and noise is reduced
- Notifies you on ALL new messages
- EVERY message goes into a recipient's mailbox

A team…

- AUTOMATICALY separates your inbound communication into Channels
- Let's you TUNE IN to what you care about and tune out what you don't
- Notifies you only for messages you EXPLICITLY care about
- @mentions allow you to poke recipients only when relevant

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And IT organizations benefit as well…

Email-focused approach

- Difficult to get users to store files where they belong
- Storage burden of duplicate attachments
- Data governance and security spread across multiple systems
- Burden of creating and managing distribution lists

Modern collab with Teams

- Files seamlessly routed in normal conversation flow
- File access from threaded conversation, pin important files to channel tabs
- O365 platform retention and security features have you covered
- Self-service approach *can* improve agility and admin efficiency when done right

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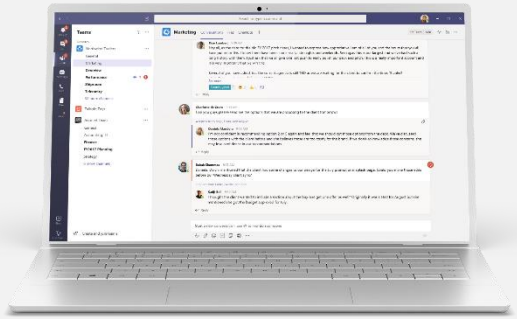
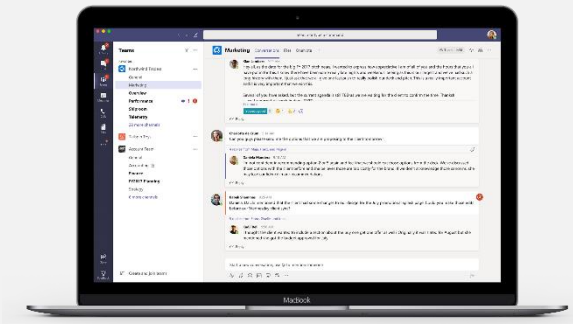
Three ways to access your Teams

Desktop



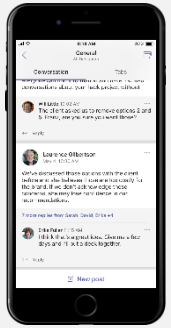
Windows 7+



OS X 10.10+

Mobile

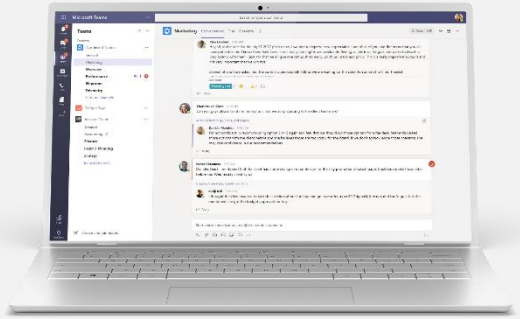
iPad



iPhone

Android

Browsers



Edge

Chrome

Firefox

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How can we improve everyday experiences with Microsoft Teams?

Customize & extend Microsoft Teams

Organizational tools & services

3rd party applications

Office 365 applications

Departmental tools

Employee resources

Support & info

make your apps work for you

INTERCOM
Trello
Adobe
sapho
zendesk
Growbot
icertis
Applied Cloud
MICRO FOCUS
SurveyMonkey
Hootsuite
meisterlabs
GitHub
ModuleQ
Polly.ai
Wrike
Unlock productivity with
smartsheet
Mail Clark
150+ integrations
KAYAK
sage
officevibe
Zoom.ai
talla
hipmunk
meekan
ZENEFITS
papr.ai
nimble
workato
POPin
STATSBOT
asana
Stream

Microsoft Teams Extensibility

Government Community Cloud Coming Soon

Channel Tabs

- Sharing group information
- Pin information or tools important for the channel

Connectors

- Simple webhook notifications in channels

Bots in channels

- Coordinate tasks in a team environment
- Broadly share information

Compose Extensions

- Make it easy for your users to look up and share information

Personal Tabs

- Create a personal workspace
- Aggregate content from across Teams

Bots in 1:1 chat

- Easy access to commands
- Q&A
- Provide user right insight at right time

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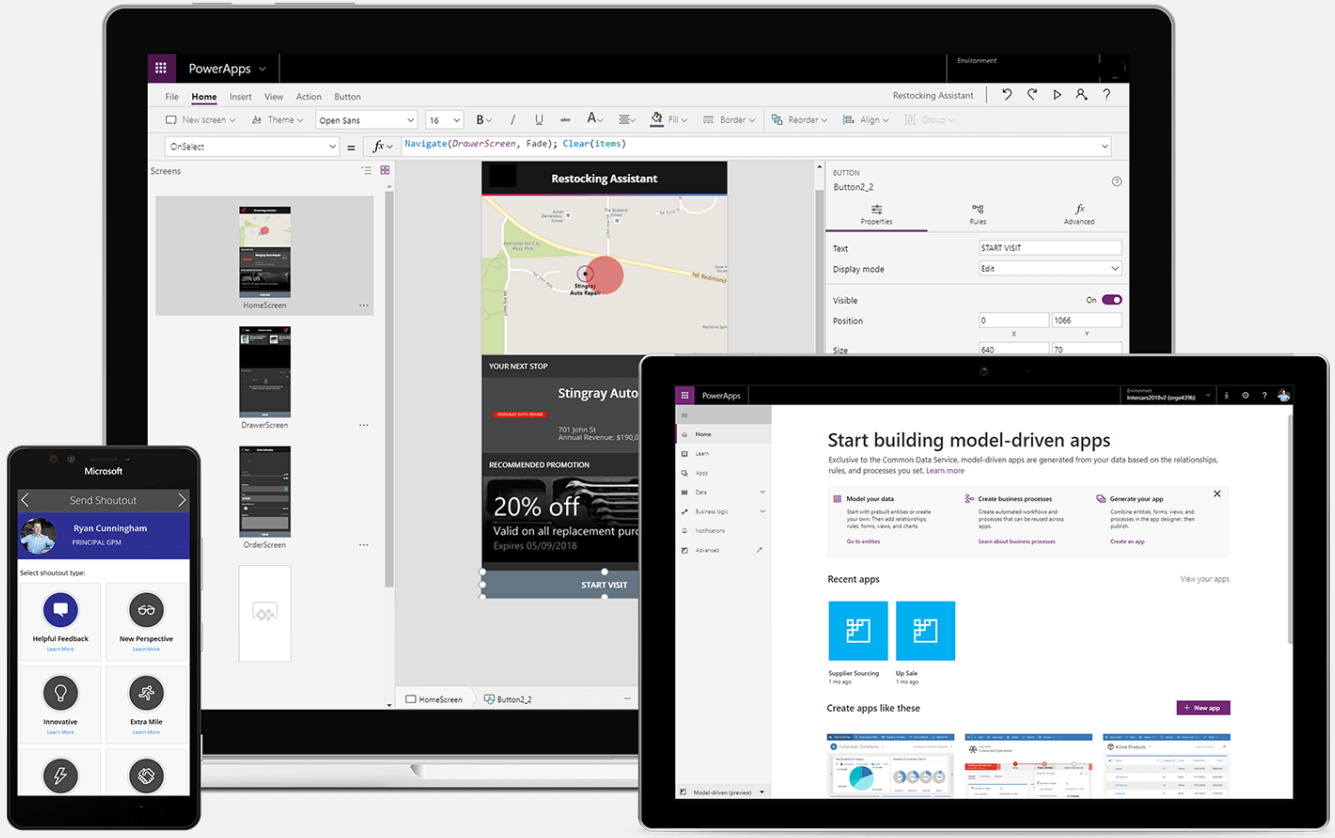
Build Apps with PowerApps

- Solve business problems with intuitive visual tools that don't require code
- Easily build and share apps on any device
- Customize every detail of your app to optimize for specific tasks and roles



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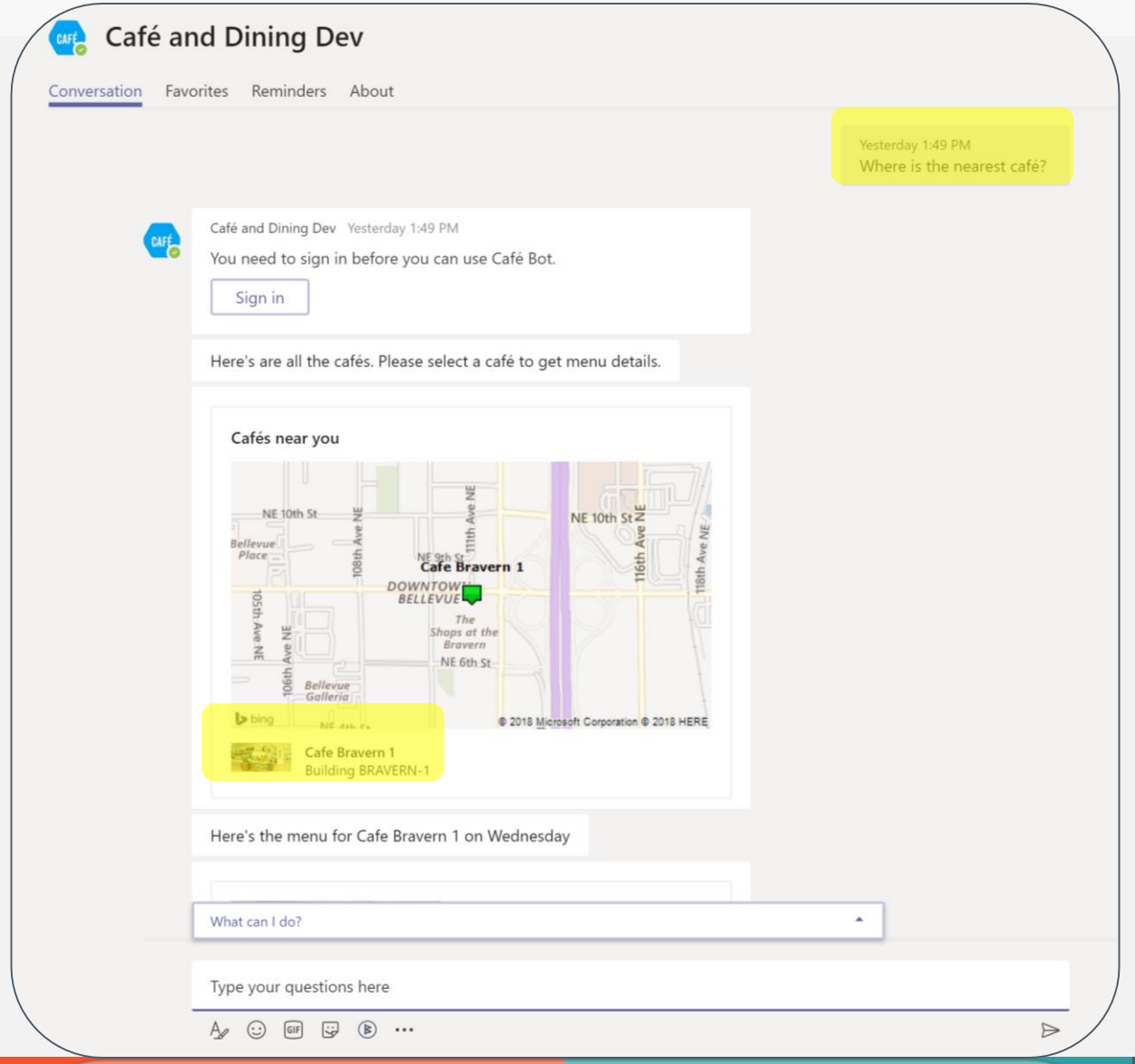
Every day I have to … eat



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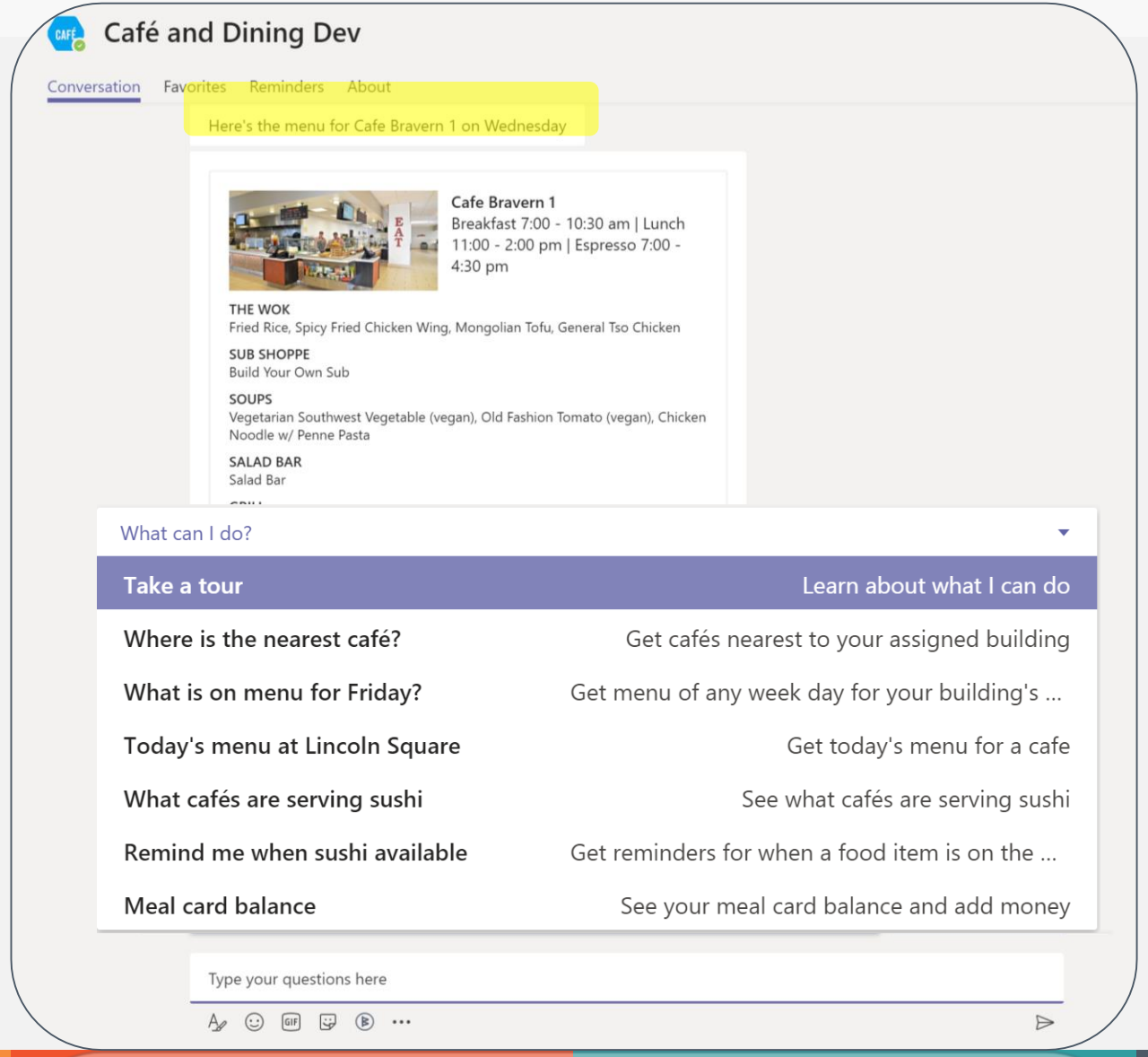

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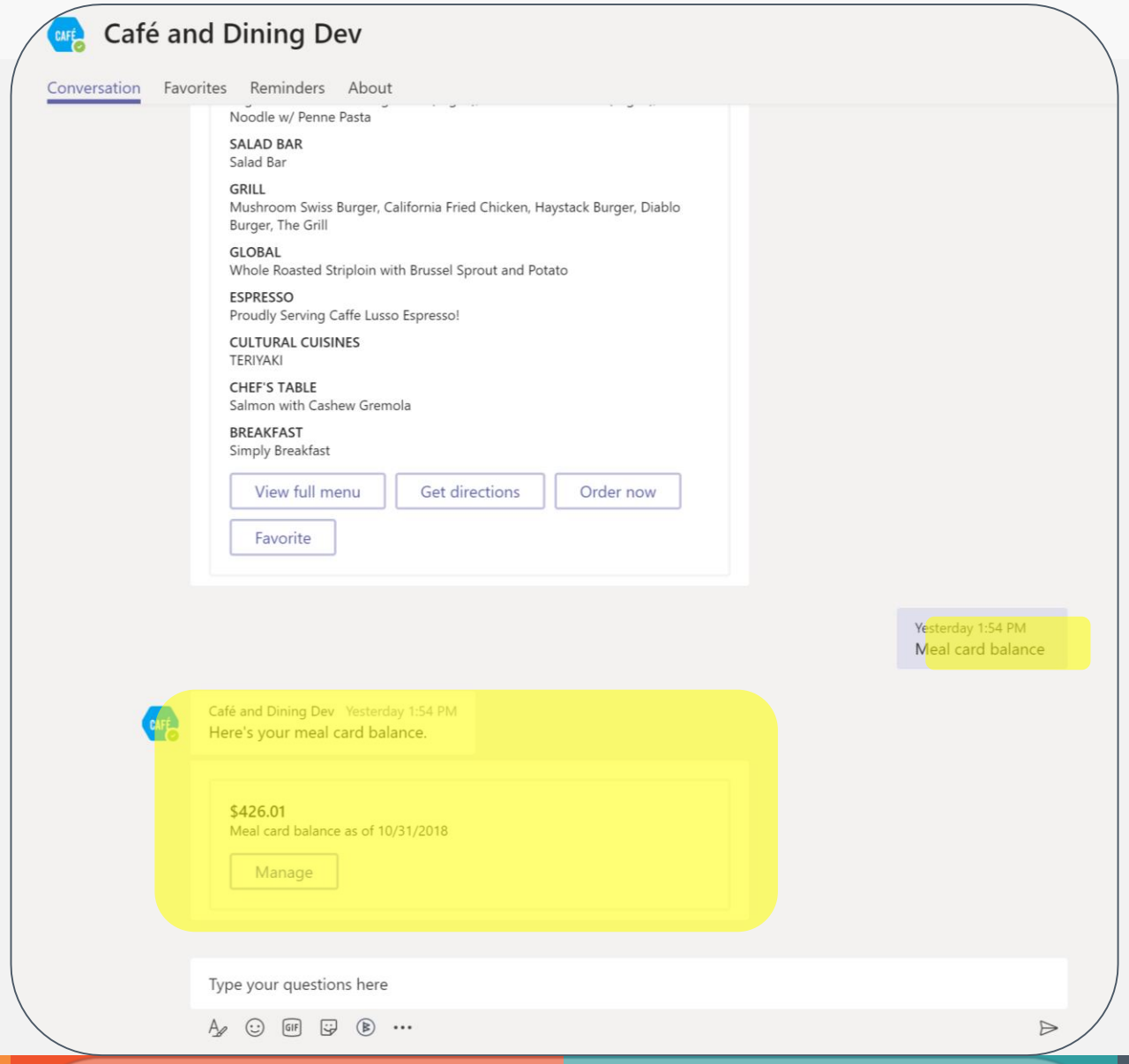

Enable Business Solutions

Teams for different departments

Marketing

Deliver marketing campaigns and go-to-market activities across a diverse group of internal and external stakeholders.

Sales

Build and deliver proposals with input from different stakeholders.

Manage sales planning, training and sales readiness in the same place.

Finance

Aggregate and report on data while conducting business reviews.

Human Resources

Manage recruitment, training and reviews across departments.

IT

Drive IT transformation and change management.

Plan, execute and manage all phases of IT deployment, adoption and rollout.

Engineering

Move quickly between ideation, development and deployment.

Integrate with developer tools.

Project Management

Manage project stakeholders, tools, budgets, project reviews and feedback.

Get guidance on these and other scenarios in the [FastTrack Productivity Library]

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Not sure how to begin?

To help identify business scenarios, consider using the framework below

As someone in...
(Team)

I want to....
(Description of what I want to do)

Using...
(Specific application of the technology)

I'll know this is successful when....
(Solutions success measure)

As someone in
Sales Management

I want to
have a single version of the sales proposal that everyone has access to rather than managing multiple versions in email

Using
a SharePoint site to centrally store and share a single version of a sales proposal that my team can edit together using co-authoring in Word and PowerPoint

I'll know this is successful when
my sales team creates proposals more easily, giving them more time to close deals

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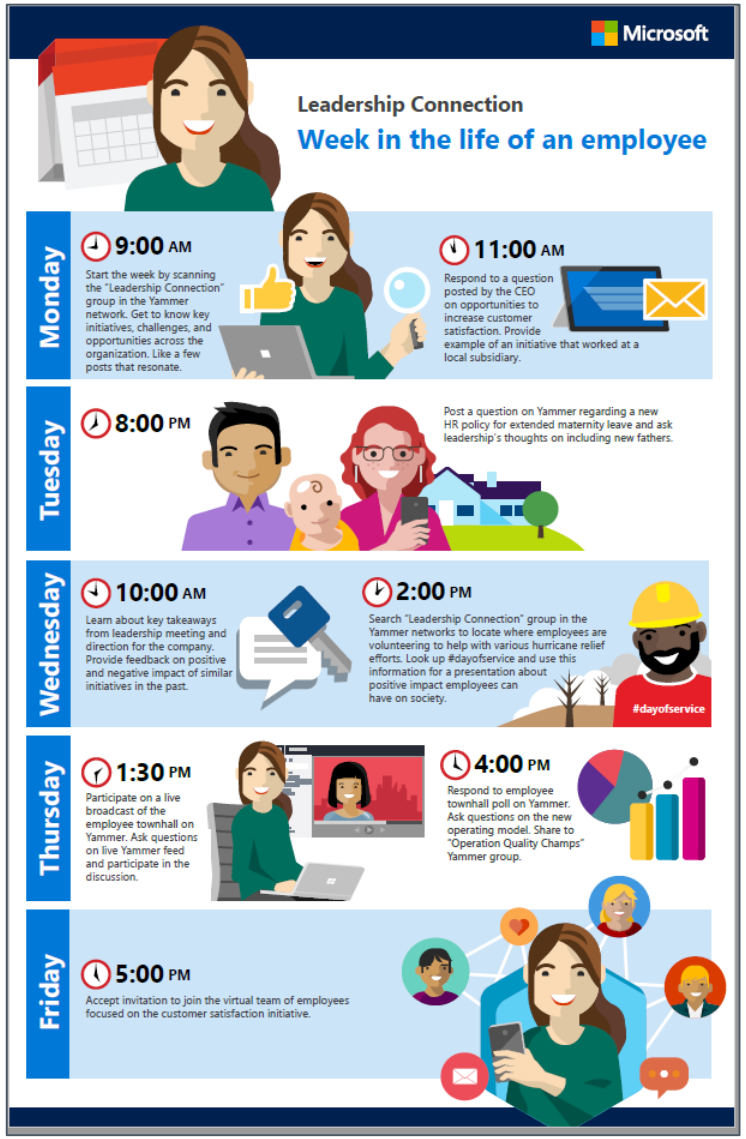
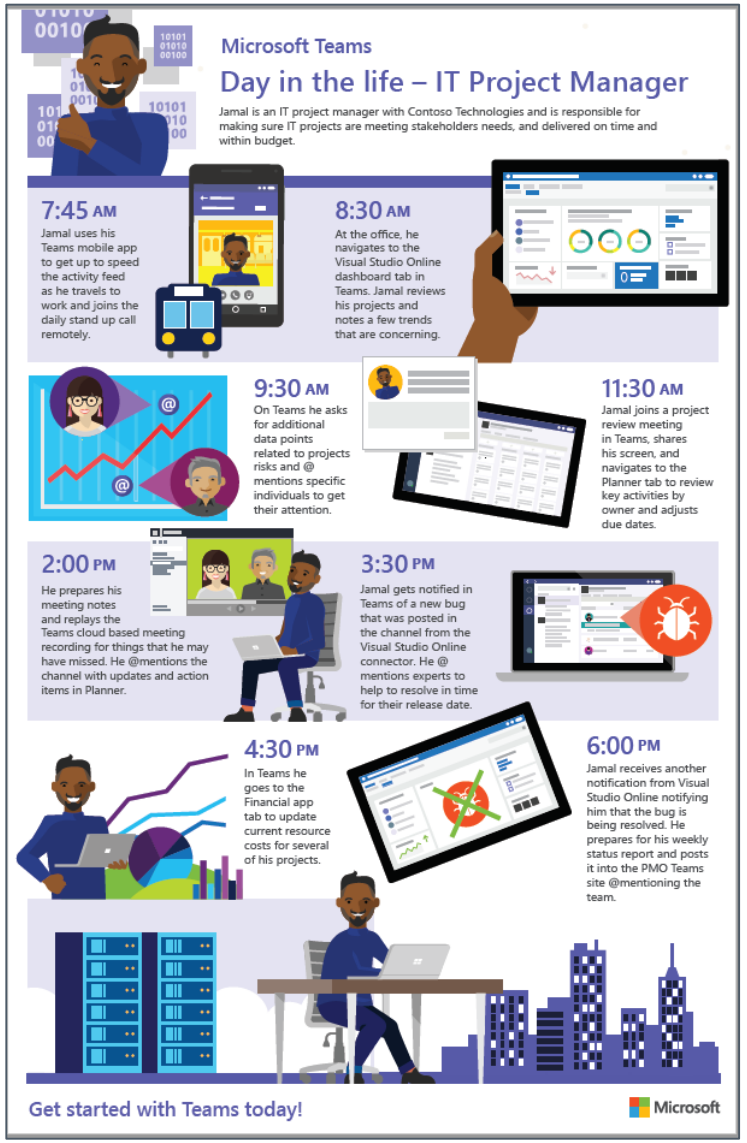
Examples: A Day in the Life





Practical Teams Strategies

Change Management

Event Staff

Firstline Workers

New Employee Onboarding

Budget Management

Deploy Change Management Solutions

- Effective Change Management (CM) strategies require teamwork and communication to build successful campaign launches.
- Documentation can be stored and easily updated within contextual channels; it should be accessible to all team members, both internally and externally.
- Tasks and work items can be tracked with Planner, utilizing in-channel discussions and notifications to ensure delivery of a successful strategy.
- Create easier ways for teams to collaborate on your next project with dedicated channels in Microsoft Teams. Use one channel for research or messaging pillars and another to start your strategic plan.

Manage Event Staff

- Channels and Connectors, like the Facebook connector, show notifications from pages you own or follow. Members can start conversations about the content coming in.
- As actions and work become required, delegate tasks and track completion by adding Planner – use the tab to streamline contextual access!
- Use @mentions to coordinate your content and event planning to include approvals and more.
- Store content, tools and promotion materials in Teams.
- Streamline reviews and approvals of your content and event plan by managing it in Teams.

Microsoft Teams for Firstline Workers

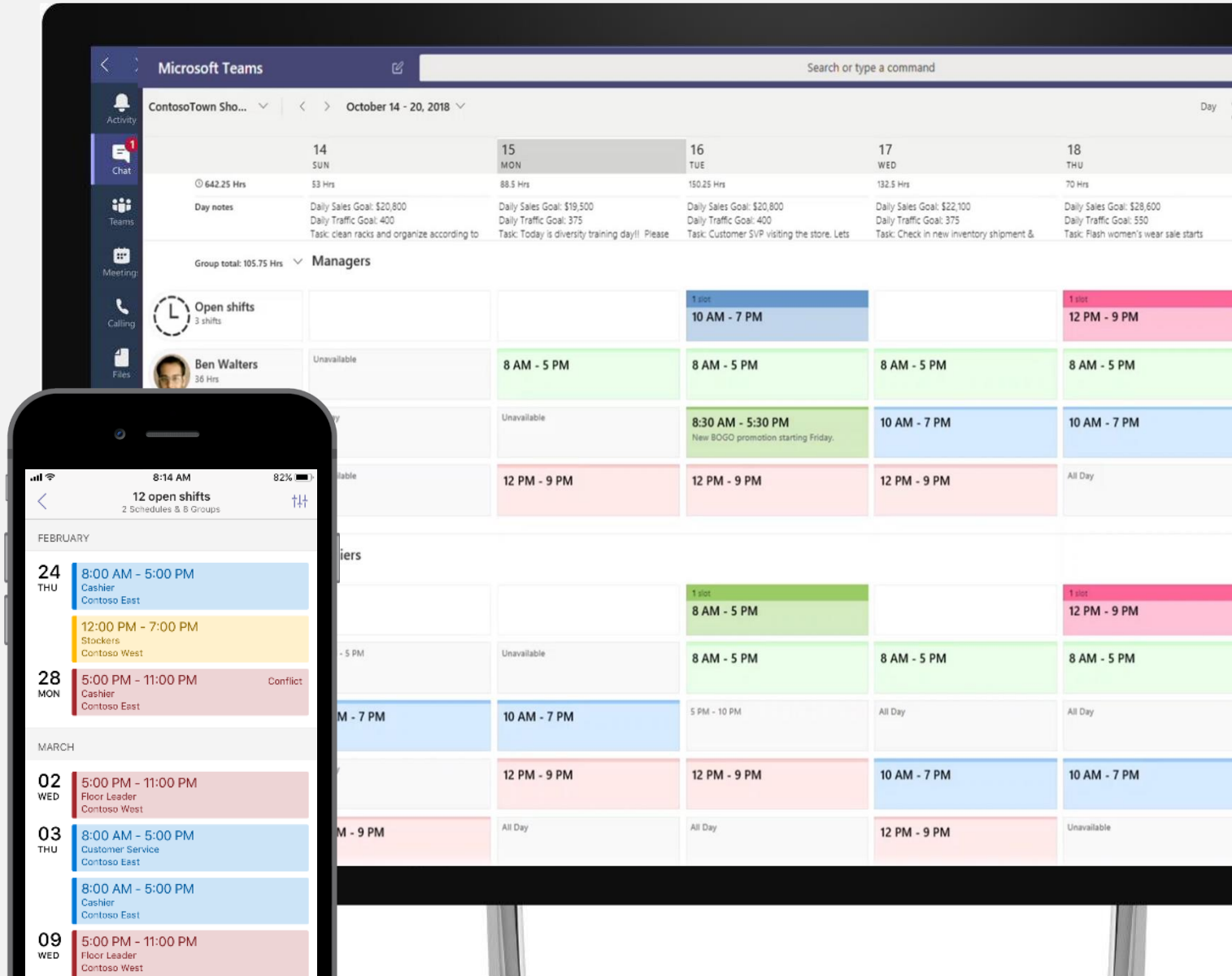
Empower Firstline Workers with tools to succeed

With Shifts, **Firstline managers** will be able to:

- Plan schedules for teams from the desktop and web apps
- Broadcast open and unfilled shifts
- Accept or deny time off, or shift changes from the mobile app

With Shifts, **Firstline team members** will be able to:

- Review requests and open shift information from their mobile app
- Request time off, shift swaps or offer shifts from the mobile app
- Set their availability for the day or specific hours



Update Firstline Workers with Policies

- Onboarding new employees and keeping your Firstline Workers updated on the latest company news, safety procedures, and best practices can be challenging when people are spread across locations and policies change frequently. You need an easy to way to make the latest news and policies accessible to employees and incorporate new information when necessary.
- Make sure your employees have the latest company safety procedures and policies with Microsoft Teams. Store handbooks, training materials, safety procedures, and other resources in the Files tab so workers can access them anytime. When you add a new employee, they can instantly access the information they need from any device.
- Use @general mentions to let your entire team know when new or updated procedures, product specs, or sales reports are available. Use chat to answer any questions they have or to provide additional context.
- You can also do trainings with live events and answer employees' questions in real time. Employees can also work together in Teams to share best practices, ask questions, and get feedback instantly.
- Make training materials easily accessible to all employees.
- Communicate new procedures instantly.
- Create interactive trainings so employees can ask questions and share best practices.

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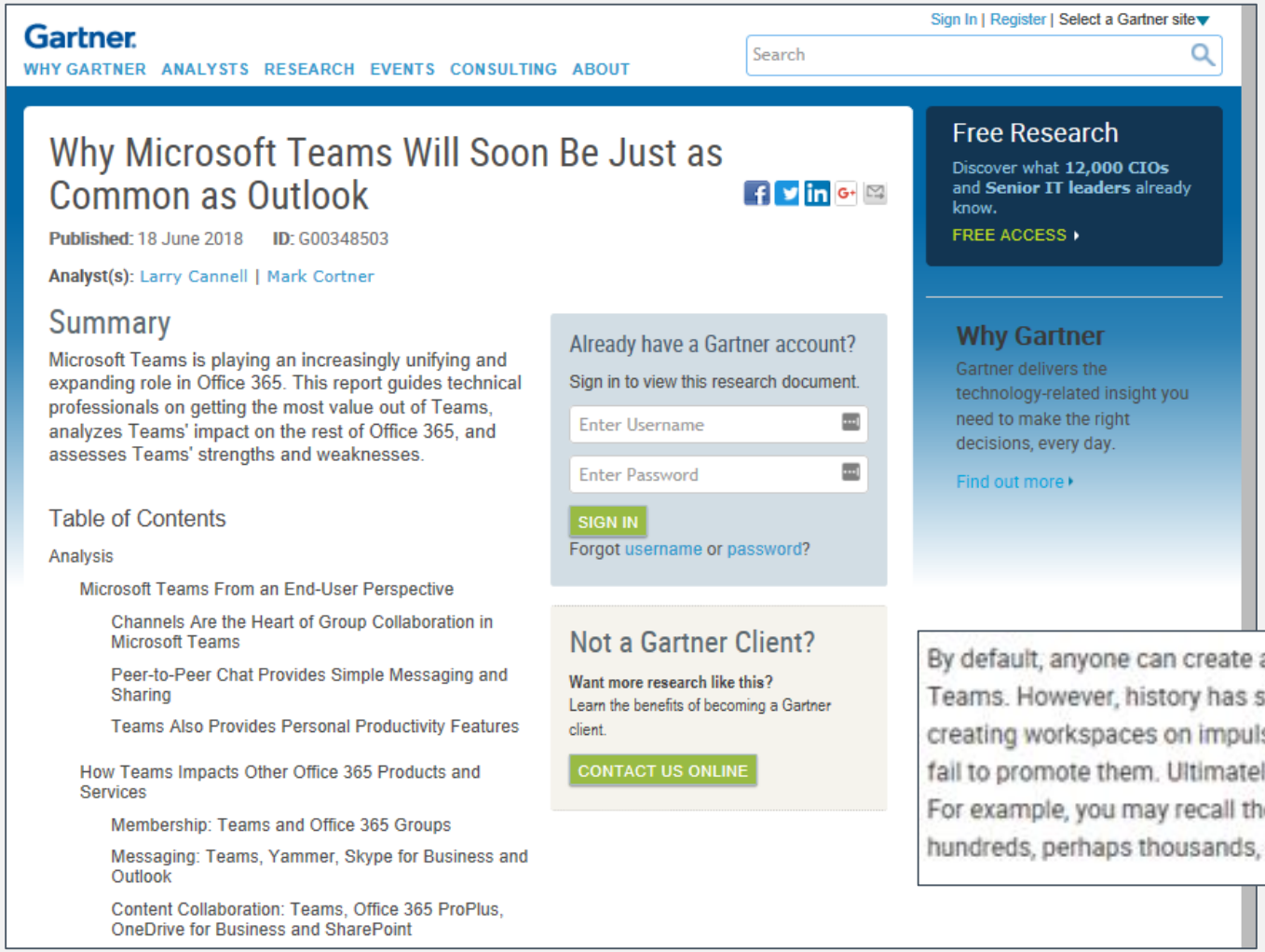
Effectively Onboard New Employees

- Successful new-hire onboarding is critical to engagement and retention, but it can be challenging when the right processes aren't in place.
- You need an easy way to make resources, documents, and trainings accessible, and connect new employees with their team and the broader organization for support.
- Create a channel dedicated to new hires to ensure new employees get the information, support, and training they need.
- Host trainings with live events and answer questions in real time and address any follow-up questions via chat. Save training videos, documents, and other information in the Files tab so new hires have all the information they need all in one place.

Simplify Budget Management

- Managing large budgets and getting multiple sign-offs can take a lot of time and energy.
- Simplify the process by bringing your budget planning and management teams together in a common workspace with the apps and files you use every day.
- Store files like templates and historical budget documents in your Microsoft Teams channel for easy access and standardization.
- Share important updates and track departmental needs, commitments, and budget releases in the same channel to ensure clarity across the team.

Make it Easy to Do the Right Thing



By default, anyone can create an Office 365 group. Therefore, anyone can create a team in Microsoft Teams. However, history has shown that allowing this privilege to go ungoverned can result in users creating workspaces on impulse. Such workspaces often become abandoned, because their creators fail to promote them. Ultimately, people wonder why the workplaces were created in the first place. For example, you may recall the early days of SharePoint Server. Some enterprises saw the creation of hundreds, perhaps thousands, of sites, with little thought given to why those sites were needed.

https://www.gartner.com/doc/3879669

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Why Governance is Critical to Adoption

Setting the right rules up-front makes it easy and reduces resistance

Strategy Alignment

- **Why:** Understand the broader business objectives and success criteria for information management
- **How:** Review and align with the organisations long term vision and existing frameworks

Business Information Architecture

- **Why:** Understand the information landscape focusing on the information processes of an organisation, how information is captured, distributed and used
- **How:** Define the Information landscape and the architectural aids, structures and repositories to help connect information needs with information resources.

Governance

- **Why:** Assess the people, process and technology dependencies and requirements for the various information domains and processes of the organisation
- **How:** Assign supporting roles, develop supporting communication and education activities, the ongoing governance and sustainable practices for both IT and the business

Communications & Change Management

Why: Open and consistent communications ensures end users not only know what changes are coming but understand the value they get and are willing to learn how to best take advantage of the new tech

How: Document success criteria and goals in practical terms, align with organizational cultural change activities, develop train-the-trainer materials for scalable communications

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What Do I Need to Govern?

For collaborative workspaces, customers want to govern:

How are Teams requested, approved and created	How are availability, compliance and changes over time are managed	How do I retain/expire/dispose of Teams as appropriate
Provisioning	*Management*	*Lifecycle*

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Self-Service Enablement

Empower business users and increase use of existing Office 365 services.

Balanced Controls

Promote sustainable adoption with appropriate controls in place.

Efficiency Through Automation

Create repeatable and consistent service delivery.

Ongoing Governance

Streamline security reviews and maintain inventory of collaboration spaces.

Managed Disposition

Eliminate sprawl and reduce clutter while maintaining compliance.

Consideration

How Teams are Born

- Sprawl
- Duplication
- Appropriateness
- Convention
- Cataloging

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Microsoft native tooling to help govern Teams provisioning…

Restricting self-service creation

Can restrict creation to select group of users

Set group visibility

Options for public/private, hidden membership/group

"Classification"

Set one "classification" per group and have it displayed on Group page

Usage Guidelines

Link to acceptable use policy etc.

Dynamic Membership

Set group membership by AAD attribute

Naming rules

Prefix/Suffix, blocked words

https://blogs.office.com/en-us/2017/04/06/whats-new-in-office-365-groups-for-april-2017

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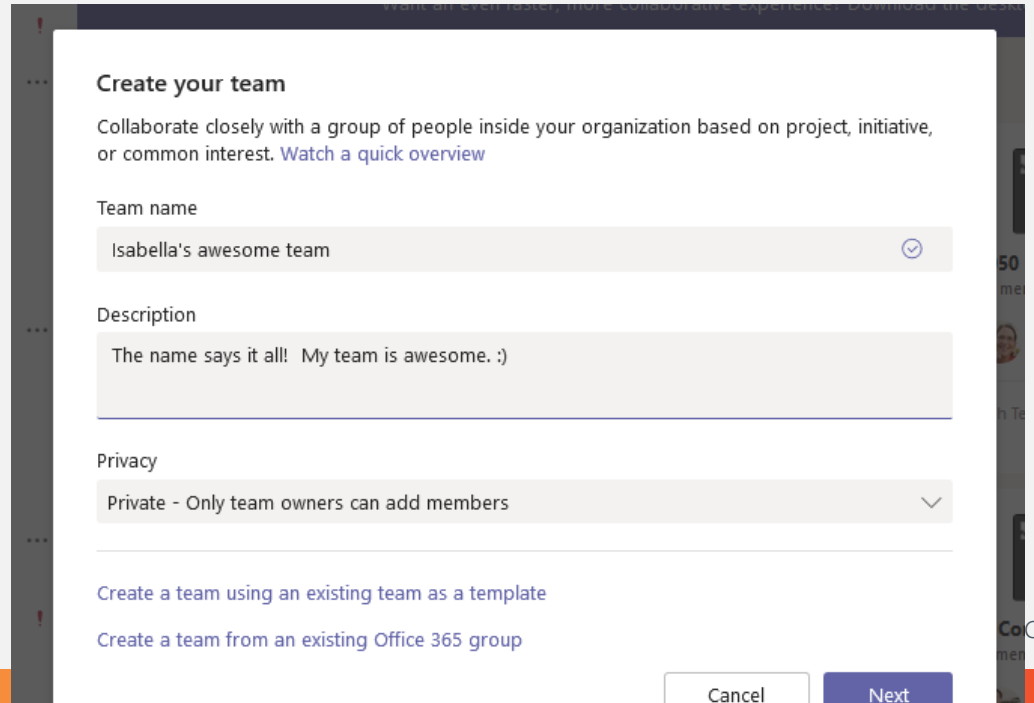
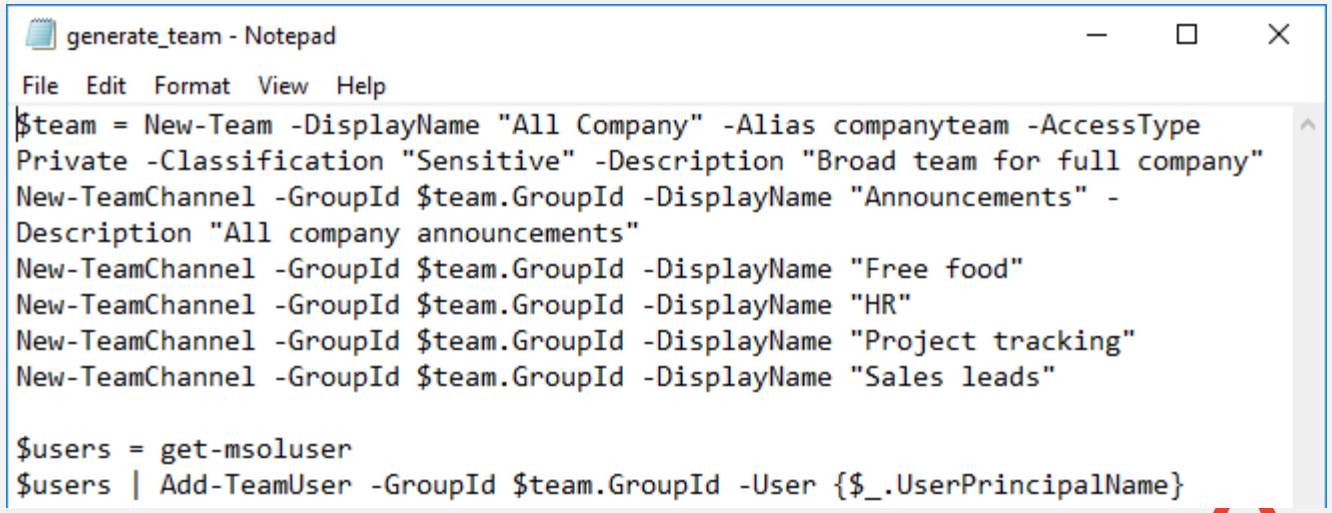
Two approaches to onboarding

- Organic onboarding – driven by your users
- IT-driven onboarding – driven by pre-identified business requirements

There is space for both approaches in many organizations





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IT-driven onboarding

- With or without self-service group creation enabled
- PowerShell cmdlets in the Microsoft Teams PowerShell Module for automating team creation and settings:
  - Create team
  - Update settings
  - Update channels
  - Add/remove members
  - Rolling out templatized team creation via API

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When considering native self-service…

You should be thinking about:

Impact on user experience and business agility

Desire/need to mandate options and settings

What can/can’t be adjusted afterwards

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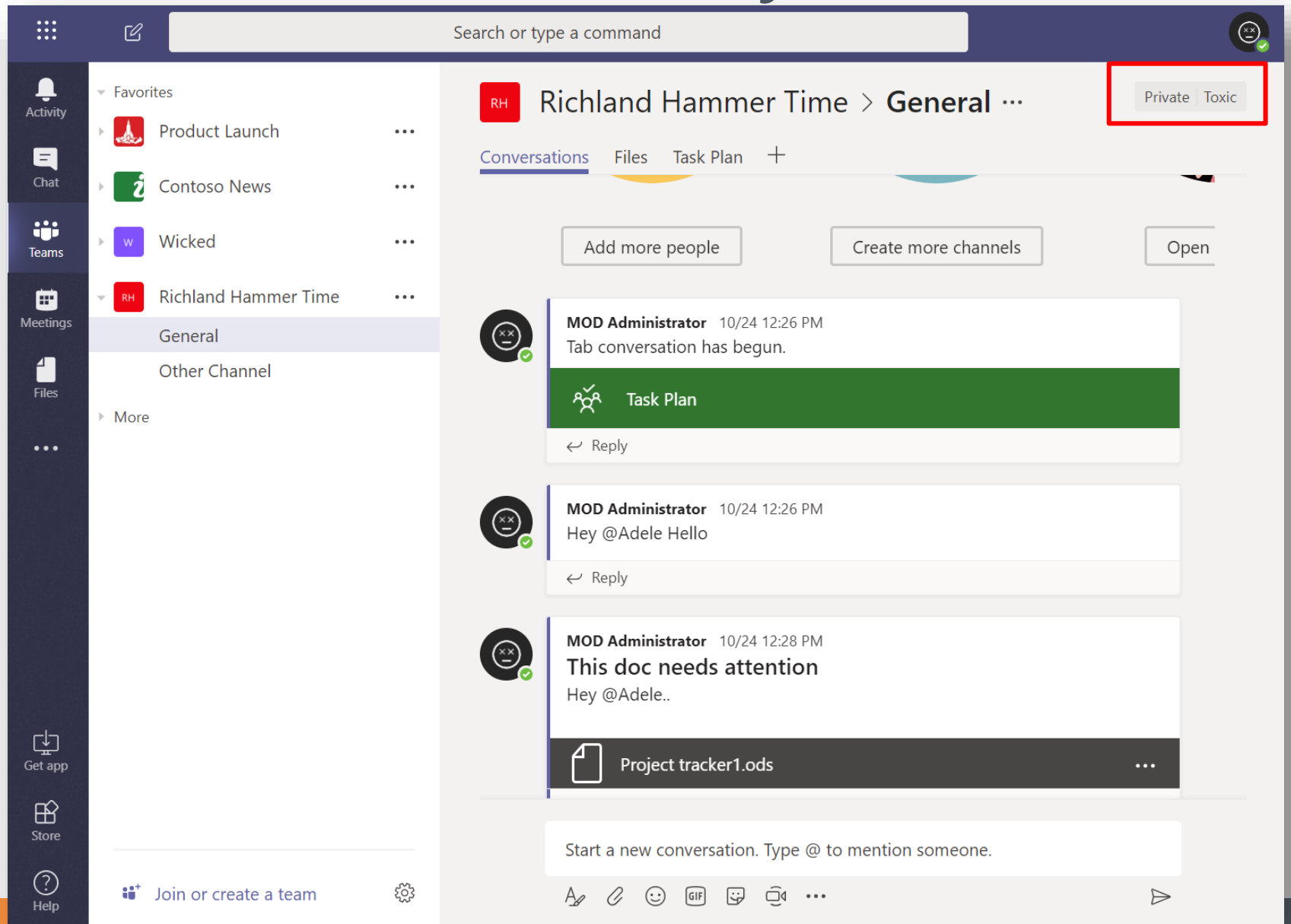
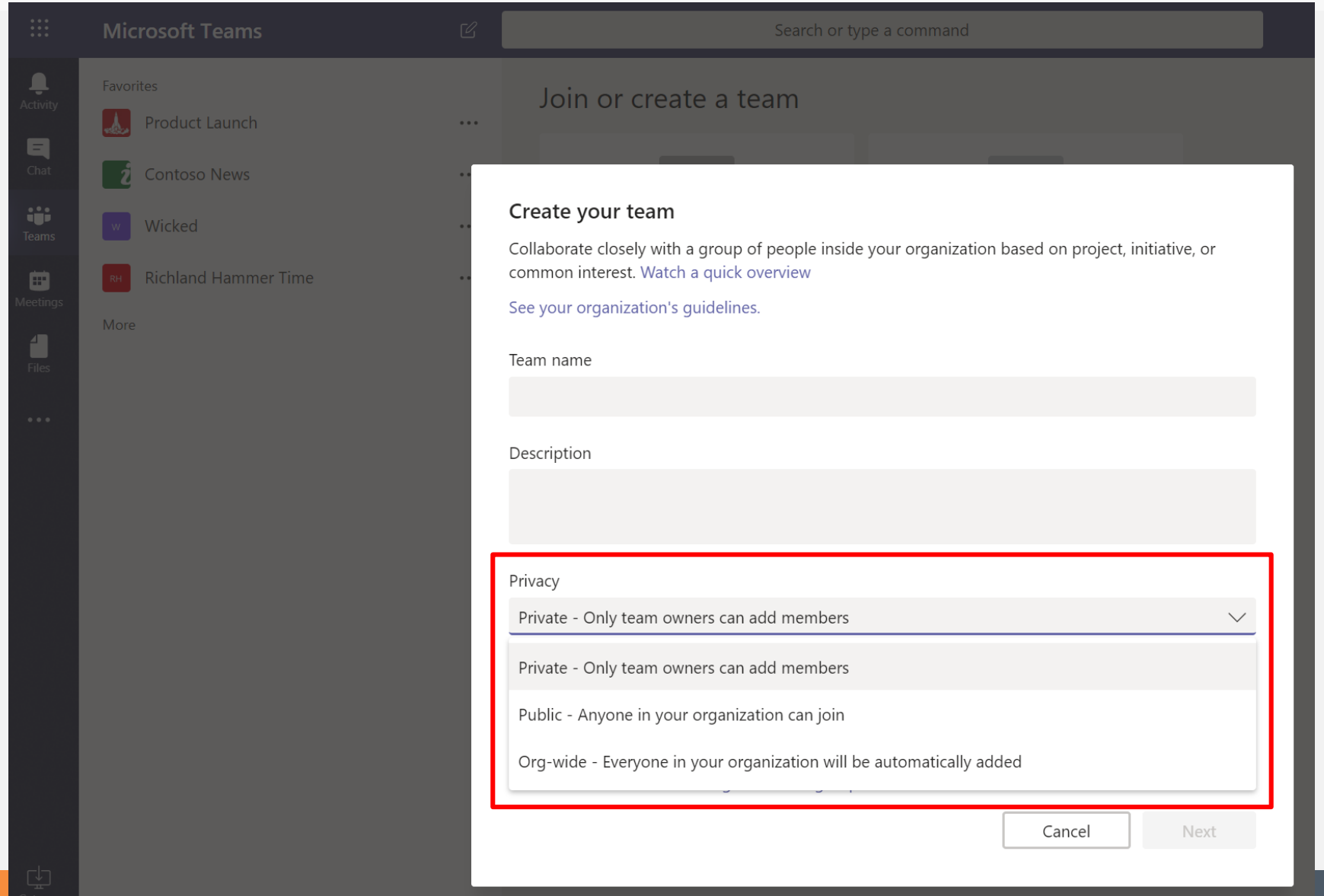
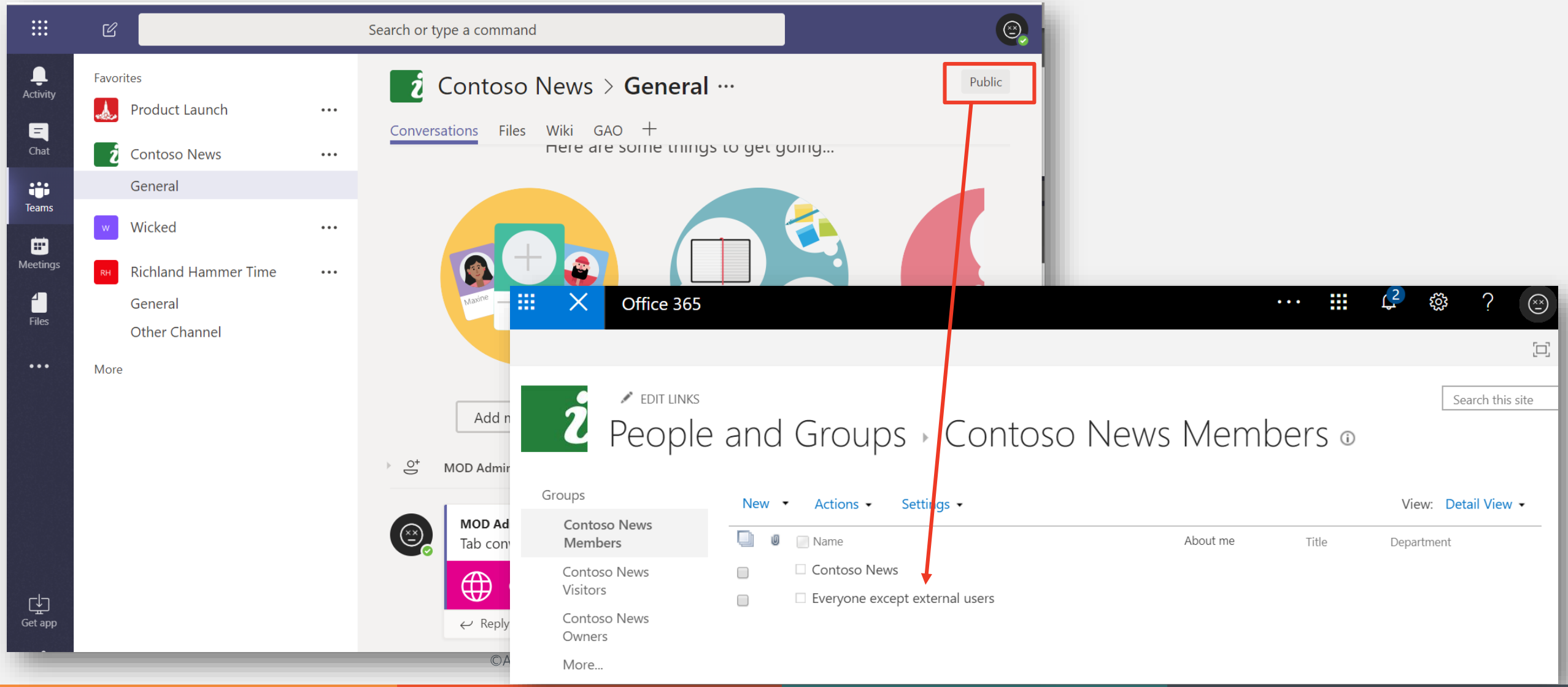
Classification and Privacy...



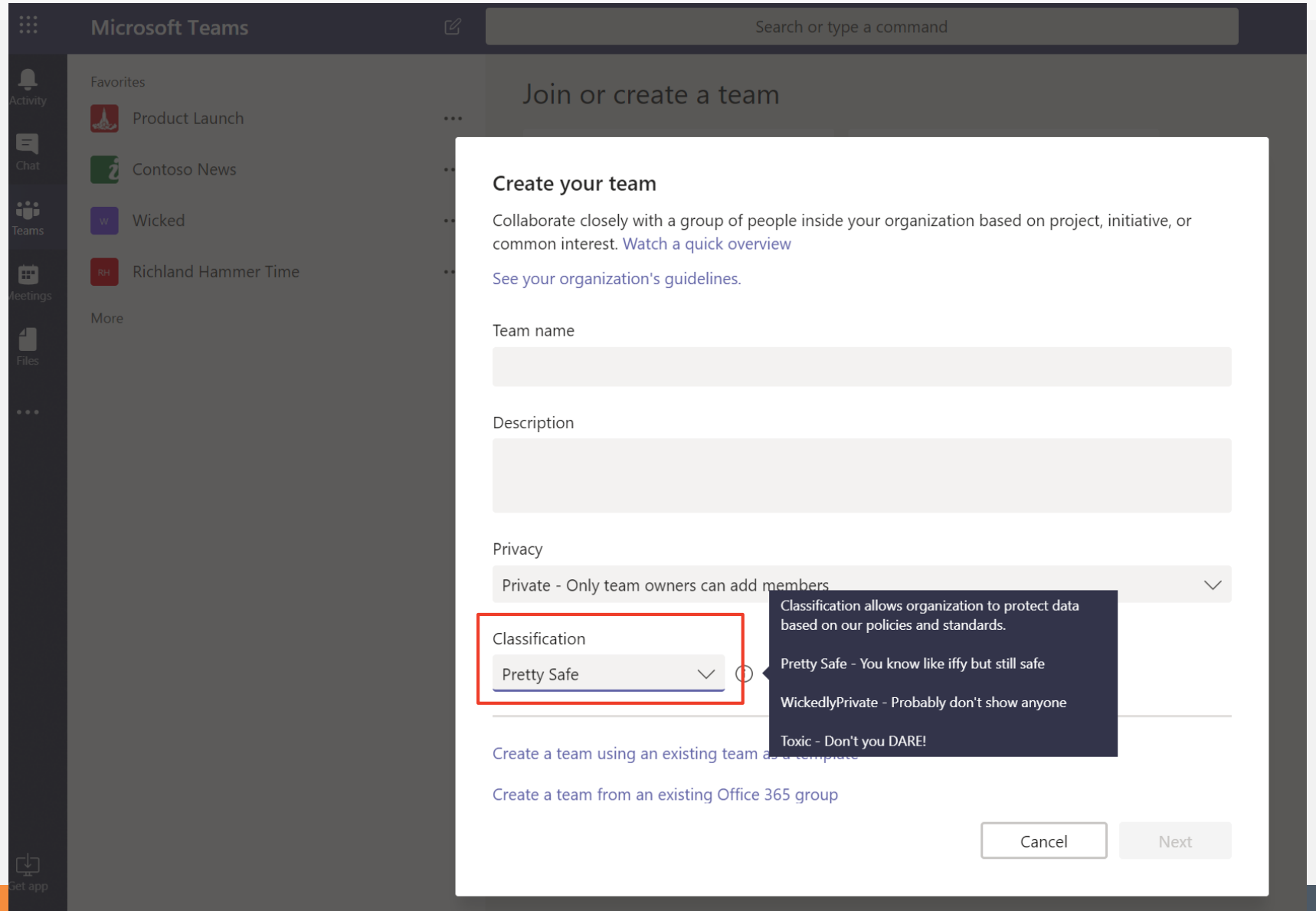
Private or Public- What's the impact?



Understanding “Public” content visibility



Group “Classification”



Understanding Classification- *Today*

Can be applied to Sites and Groups

Set at "container' level where Labels are at item level for docs and emails

Currently requires application via PowerShell

PowerShell used by an admin to create and apply classifications

Can be selected by user if self-service site collection provisioning is enabled in SharePoint

Microsoft signaling same for O365 Groups in future

Does not drive any action currently

Currently no impact on retention or expiration

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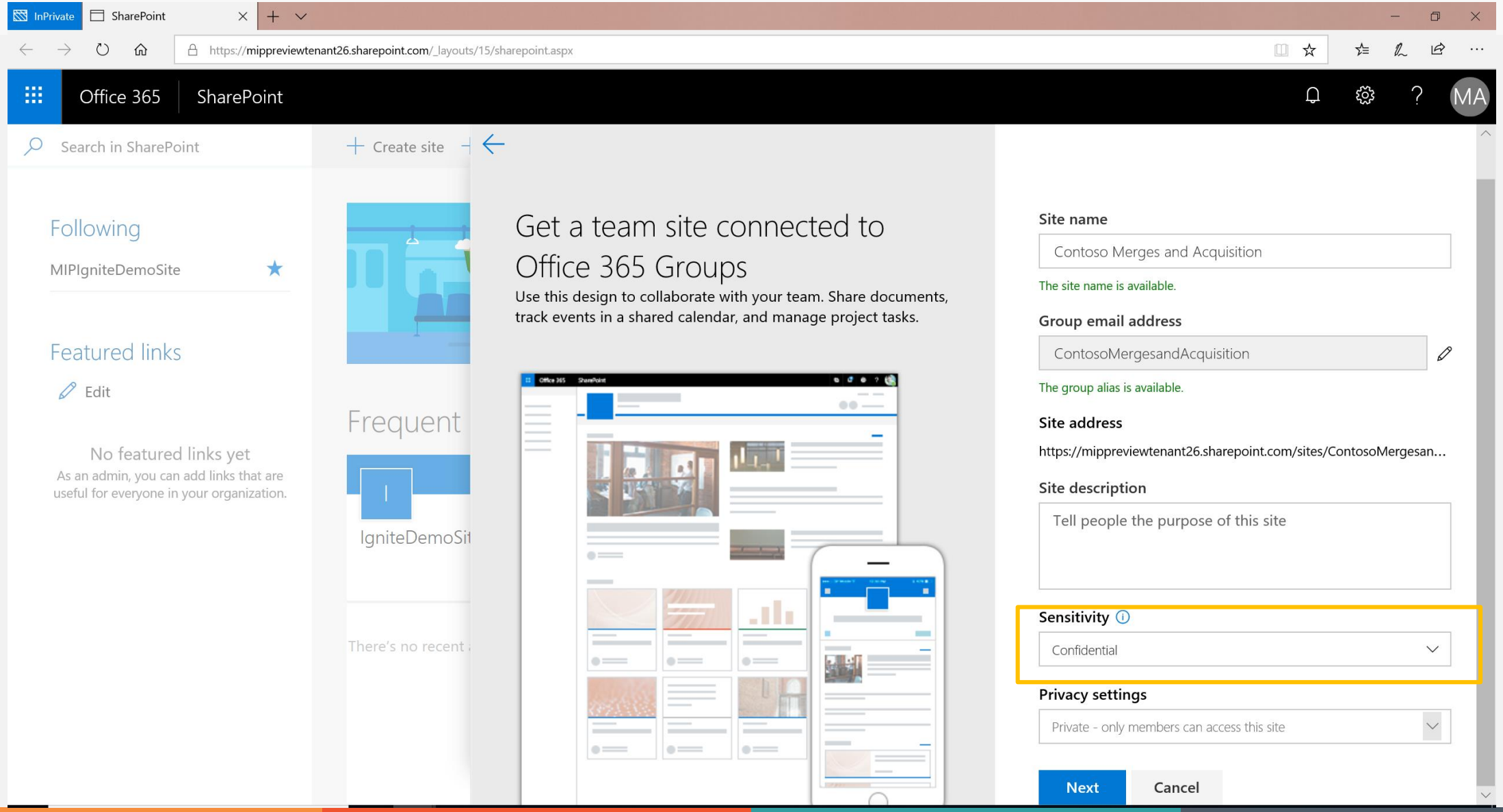
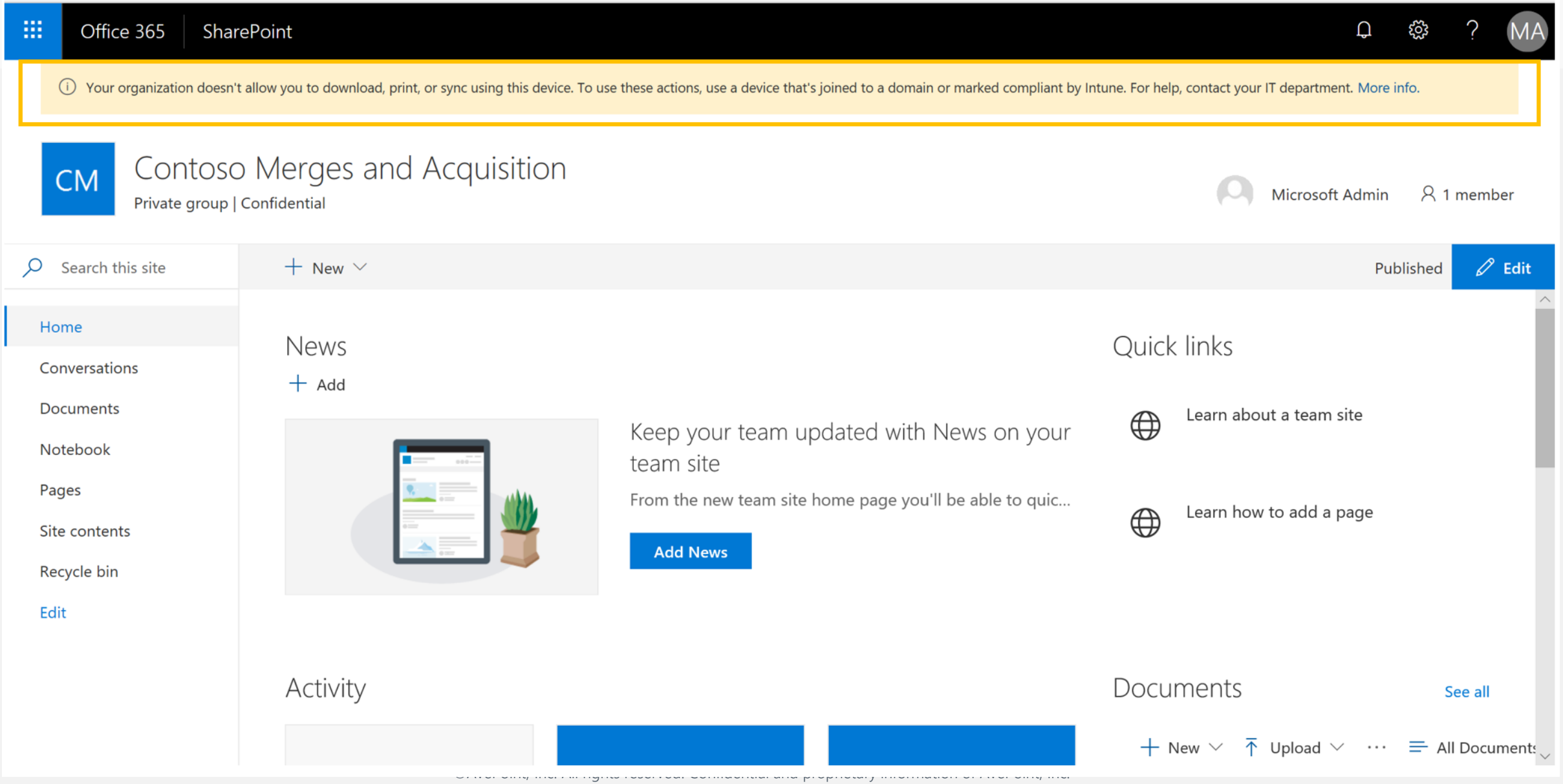
Preview EOY

Classifying SharePoint sites and Groups- *Soon*



Preview EOY

Classifying SharePoint sites and Groups



Other *Policy Driven* Management Controls?

Using the native “naming policy” for Teams and Groups…

Set the naming policy and custom blocked words

1. Now you can set the prefixes and suffixes. Run the following commands in Azure AD PowerShell:

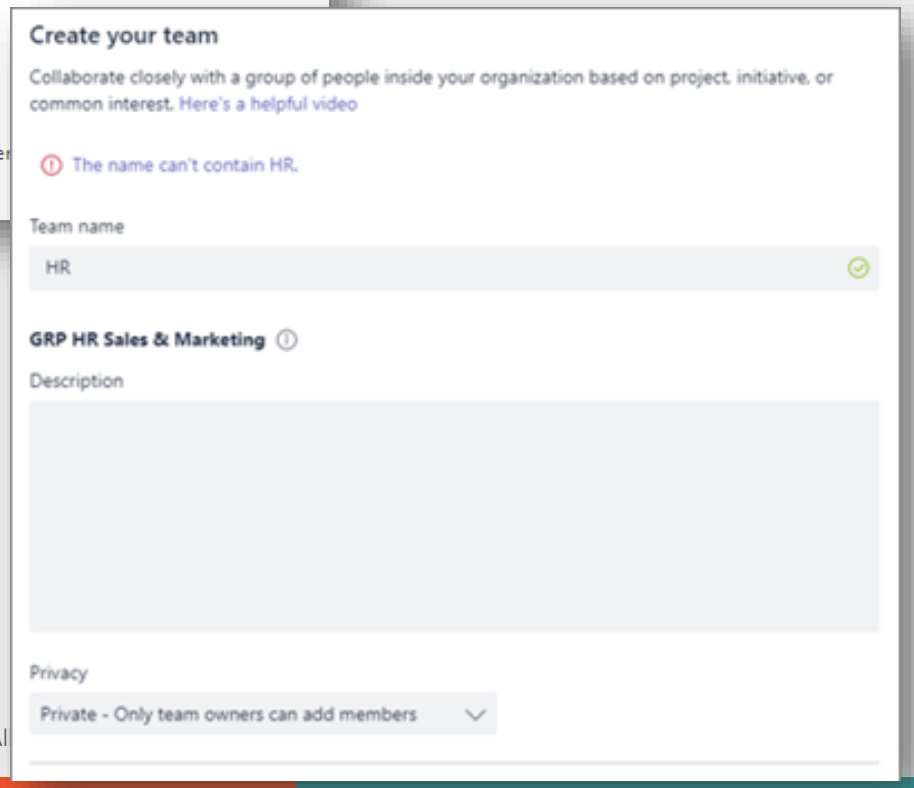
```
$Setting["PrefixSuffixNamingRequirement"] = “Grp_[Department]_[GroupName]_[Country]"
```

2. Now set the custom blocked words that you want to restrict by typing below. Add your own custom words that you want:

```
$Setting["CustomBlockedWordsList"]=“Payroll,CEO,HR"
```

3. Save the settings for the new policy to be effective by typing:

```
Set-AzureADDirectorySetting -Id (Get-AzureADDirectorySetting | where -Proper
"Group.Unified" -EQ).id -DirectorySetting $Setting
```



Limited Prefix/Suffix options

- Fixed text
- AAD properties of the requestor
- Dept, Company, Office, State/Province, Country/Region, Title

Requires *clean* AAD

- AAD properties must be current and complete

“Blocked” words

- MSFT list
- “Custom list”

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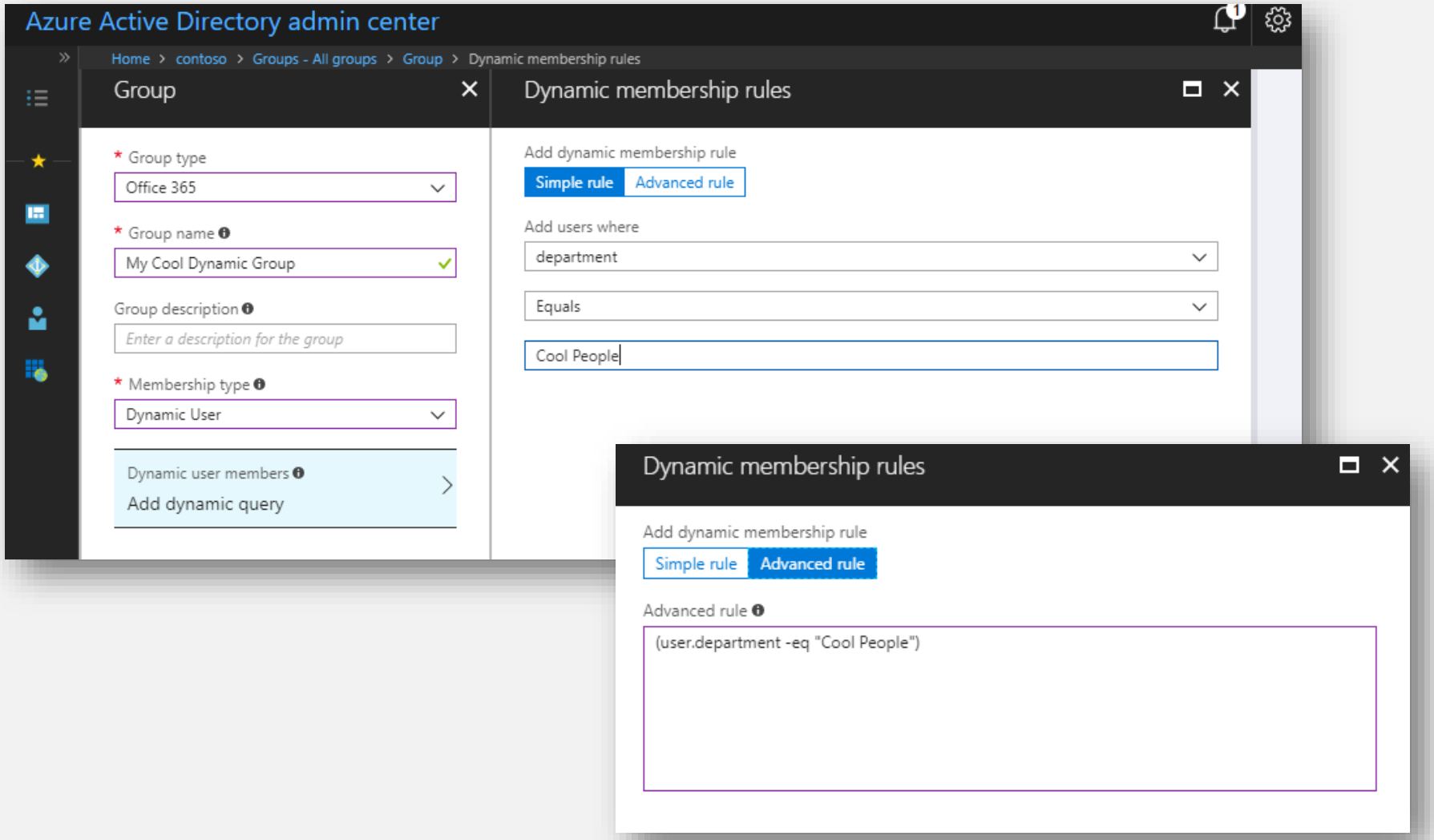
Other Options for *Naming Policies*?

Using the native “Dynamic Membership” for Teams and Groups…



Based on AAD Attributes

- AAD properties drive membership
- Not based on Security Group Membership

Requires *clean* AAD

- AAD properties must be current and complete

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Brunswick
Brunswick
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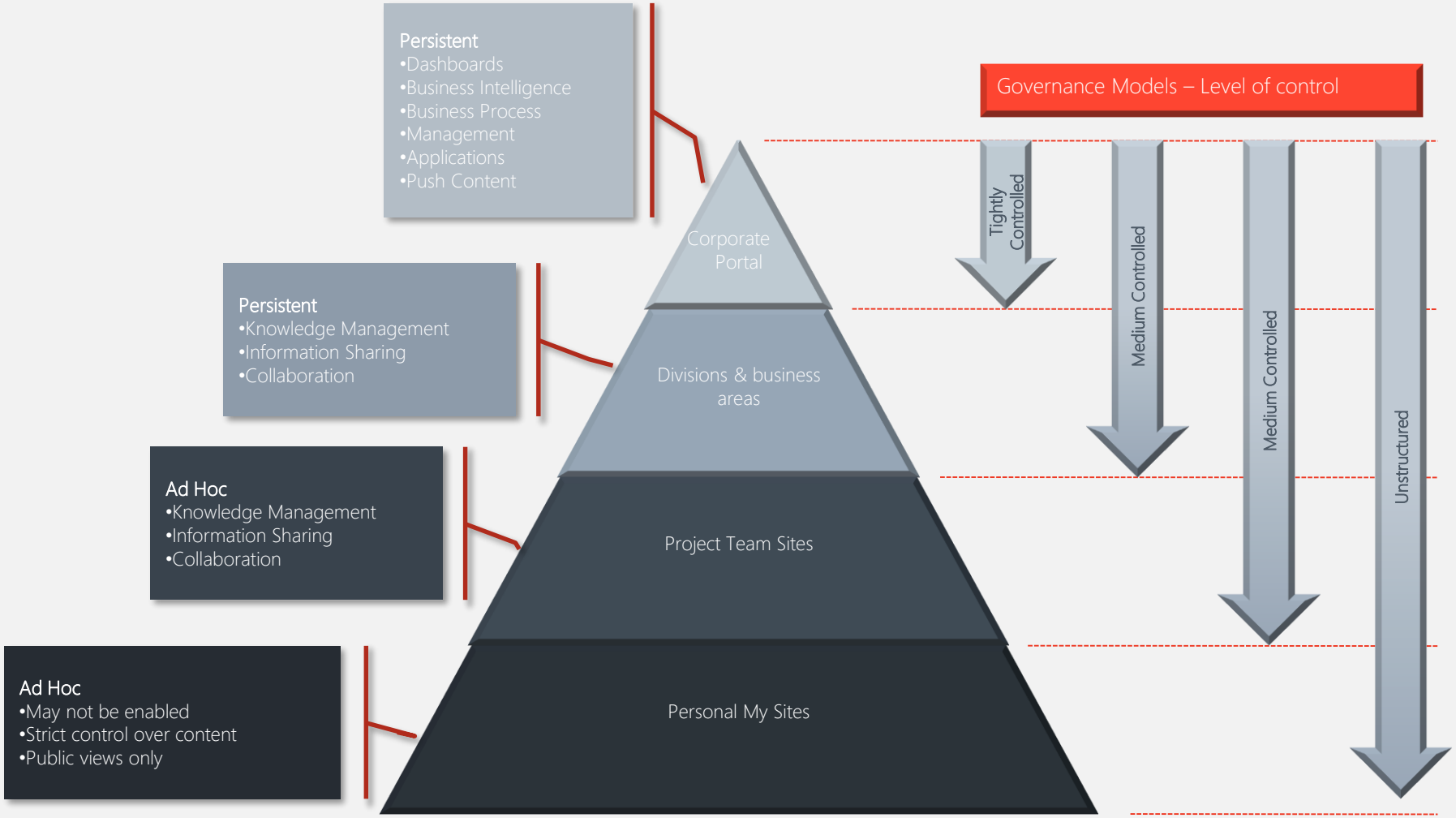
5

Different Strategies for Different Information



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EXAMPLE

	DEPARTMENT	DEPARTMENT	DEPARTMENT
EXTERNAL SHARING	No external sharing	External sharing allowed in:	External sharing only allowed in:
EXPIRATION/ RETENTION	6 Months after last accessed	12 Months after last accessed	9 Months after last accessed
ALLOW THESE USERS TO CREATE A TEAM	All requests through Central IT	All requests through Department IT	Only Joe, Sally, and Harold can create
RECERTIFY MEMBERS	after 3 Months	after 6 Months	after 12 Months

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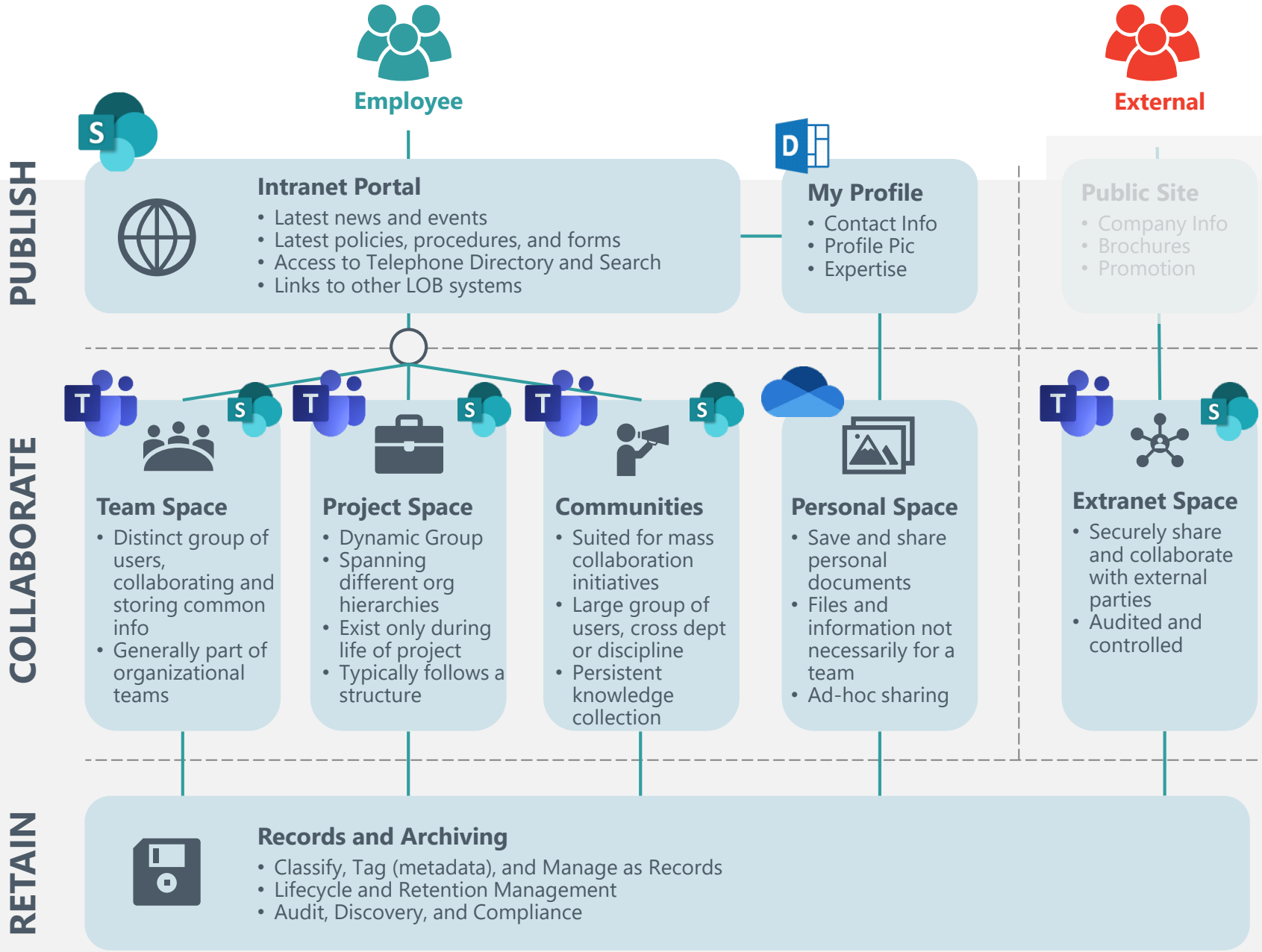
A Best-Practice Approach to Information Architecture and Knowledge Management in Office 365

Don't try and organize your information by department… think about the information type instead.



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Bringing It Together

Team Space

- Distinct group of users, collaborating and storing common info
- Generally part of organizational teams

Backup: All
External Users: No
Recert: Annual
Reporting: Ad-hoc
+
Default Labels
Metadata Presets

Project Space

- Dynamic Group
- Spanning different org hierarchies
- Exist only during life of project
- Typically follows a structure

Backup: All
External Users: No
Recert: Annual
Reporting: Ad-hoc
+
Default Labels
Metadata Presets

Extranet Space

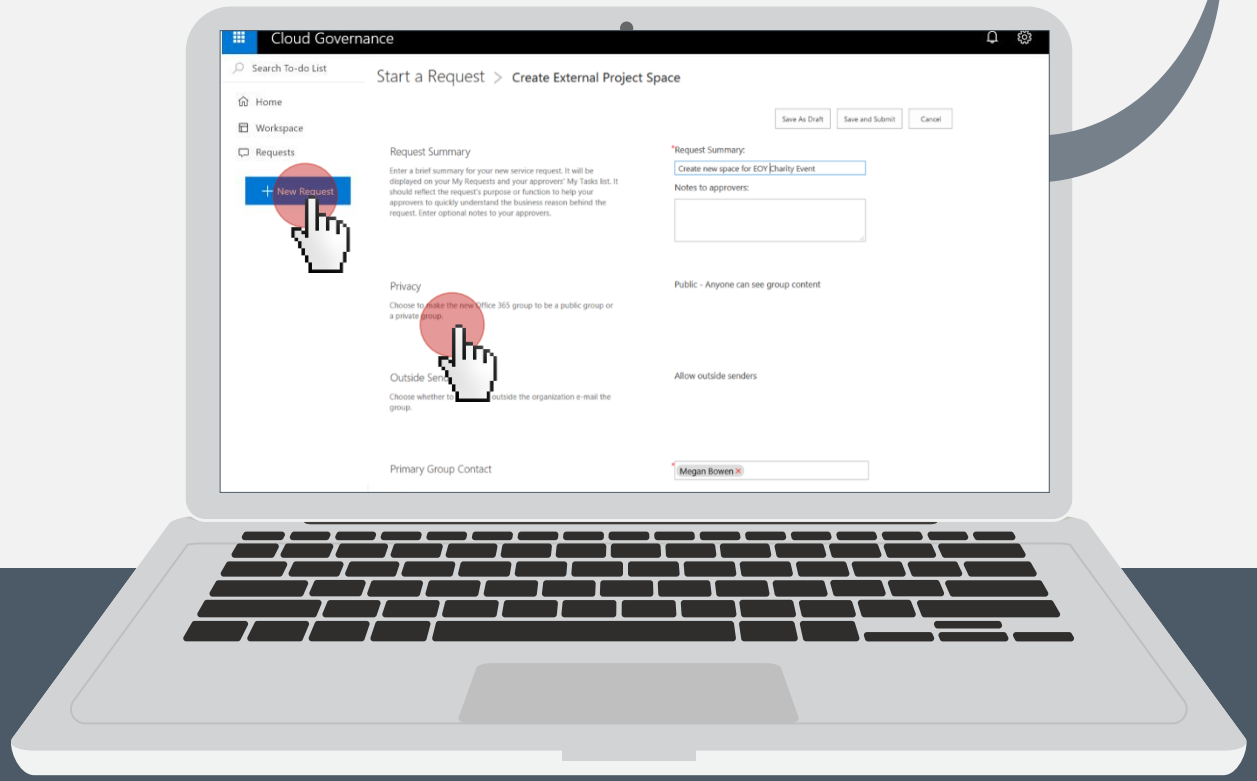
- Securely share and collaborate with external parties
- Audited and controlled

Backup: All
External Users: Yes
Recert: 6 Months
Reporting: Annual
+
Default Labels
Metadata Presets

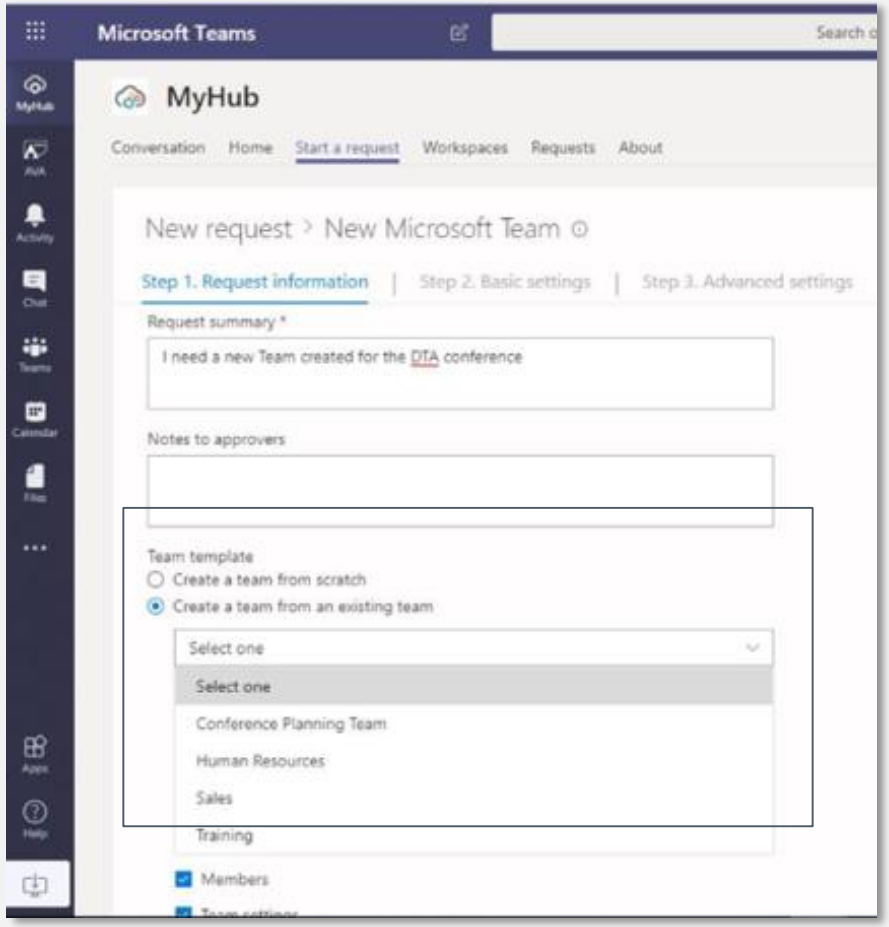
EOY Charity Event

- External Sharing: On
- Recertification / Reporting: On
- URL: /sites/PROJ_EOYCharityEvent

LABELLED
TAGGED



Example: Request and Track Workspaces



- Harness the power of **Microsoft Teams templates** to empower employees & improve employee engagement.
- Quickly spin up a new team with the appropriate pre-set **channels**, **bots** and **integrated apps**.
- Maintain **operational oversight** in Office 365 while still allowing your employees the freedom to **collaborate securely**.

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Drive Sustainable Adoption

Change is often met with resistance

Only 34% are the early majority willing to adopt new technology within the enterprise *

Resistance is normal

Resistance is to be expected…

- Time
- Insecure platform
- Yet another tool
- Enough support

… and needs to be anticipated

- Sufficient training
- Lack of management reinforcement
- Open collaboration
- 100% ready
- Change is not desirable

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Resistance Management Techniques

- Empathy – Listen and understand objections
- Focus on the ‘what’, let go of the ‘how’
- Remove barriers
- Provide simple, clear choices and consequences
- Create hope
- Show benefits in a real and tangible way
- Make a personal appeal
- Convert the strongest dissenters
- Create a sacrifice (find a way to give in)
- Find a motivator

Address resistance with communication

Common Resistance themes	Mitigation with Communications
People don't have **time for change**	Show how Microsoft 365 adds value and helps them save time
Microsoft 365 perceived as an insecure platform for collaboration and data storage – 'the Cloud'	Highlight safety and security features of Microsoft 365 and that it is centrally endorsed by IT. Consider highlighting competing "insecure" products e.g. WhatsApp.
People are worried there will **not be enough support**	Include details on how the support services will operate and supporting content/guides
People are worried there will **not be sufficient training** for new ways of working	Include details training activities and link to supporting content/guides
People are worried they will not have enough time to **'get ready'**	Clearly communicate timelines and also opportunities for familiarisation. Focus on a few simple changes to start that save time, are high impact and are relatively easy to pick up e.g. sharing a document and co-authoring.
Senior managers potentially instructing people not to use new options	Supervisor and Manger coaching is a key component to manage resistance and change management. Understand what the blockers are for managers to adopt the new ways of working and help them understand 'what is in it for me' and why the change is important and what role they play in making it a success
Open collaboration is a new concept that for some may seem 'scary' – working in a transparent way and sharing – 'working out loud	This is a big culture change which needs to be addressed through Exec Sponsor communication, linked to HR ways of working / company values and reinforced with direct managers' behaviours and messaging.
People tend to take steps only when '100% ready' vs new ways of working where collaboration is more important than individual perfect	Similar to open collaboration this is a culture and mindset change which needs to be promoted (and demonstrated) from the top. This will not happen overnight but leaders and managers can help by setting a clear example.
People **don't like change, they don't want to change. Period.**	Ensure the business sponsorship through to line managers is there and promote the benefits of working the in new way. Provide information on how people can get help (champion support, training) if needed.

Exercise – How may they resist? (optional)

Fill this section out

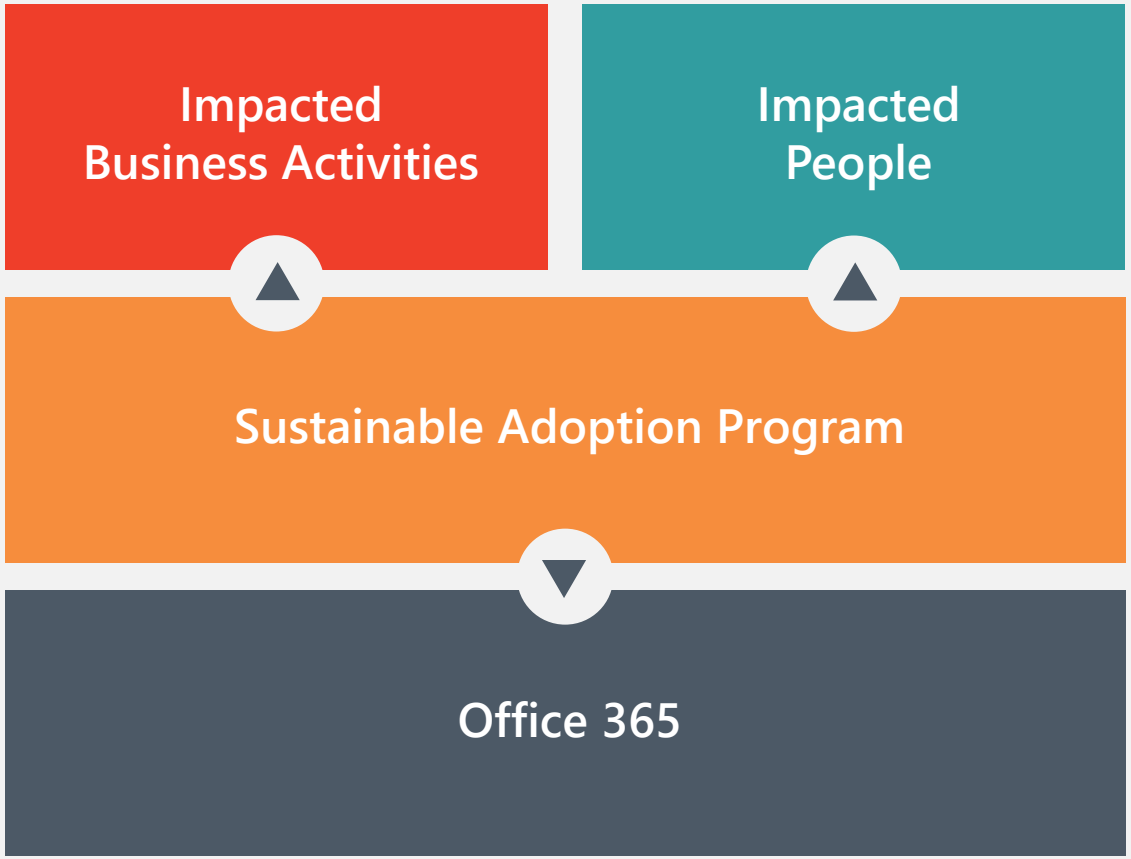
Expected Resistance	Resistance Management Plans/Ideas
(Insert Ideas)	(Insert Ideas)

Adoption challenges

- SaaS productivity platform move is “lift and shift” and no new value is delivered
- Organizations are ill-prepared to deliver continuous change provided by SaaS productivity platform
- Lack of “digital dexterity” investment such as mobile first programs

* Maximize the Value of Office 365 by Making it Part of a Digital Dexterity Program

Sustainable Adoption Objectives



- Minimize the negative impact of making technology changes
- Promote the adoption of new systems and solutions
- Provide users with the resources they need to be successful
- Encourage an organization culture which embraces on-going evolution.

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Why Training Alone is Not Working

- Non-Contextual
- Unclear Roles
- Generational Gap
- What's In It For Me?

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Step 1: Engage Key Stakeholders

- Business leadership
- Champions
- Early Adopters
- IT Support

Gain Business Leadership Buy-In

Executive Leadership

Divisional Heads

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Why champions matter

Learning from co-workers is among the most effective and used methods in learning a new technology

Champions help:

1. Generate enthusiasm around the adoption of new collaborative ways of working.
2. Build an influence circle within their teams.
3. Achieve new working methods.
4. Identify possible challenges and solutions.
5. Provide feedback to the project team and sponsors.

Make a Difference – Become a Champion

- Get more from Office 365
- Help others do the same
- Enhance your career

Get started at https://aka.ms/O365Champions

Team members to include in adoption efforts

Many people throughout your organization will have important responsibilities during the launch of a new technology. The chart below provides a summary of those roles. We have created a template so you can identify and document your team in the – Adoption Planning Workbook.

Role	Responsibilities	Department
Executive Sponsor	Communicate high-level vision and values of Microsoft 365 to the company	Executive Leadership
Success Owner	Ensure the business goals are realized from your Microsoft 365 rollout	Any department
Program Manager	Oversee the entire Microsoft 365 launch execution and rollout process	IT
Champions	Help evangelize Microsoft 365 and manage objection handling	Multiple departments
Training Lead	Manage and communicate training content about Microsoft 365	IT or other
Department Leads (Stakeholders)	Identify how specific departments will use Microsoft 365 and encourage engagement	Any department (management)
IT Specialists	Oversee all technical aspects of the rollout, including integrations	IT
Communication Lead	Oversee company-wide communications about Microsoft 365	Corp Communications, IT or other

Note: Though we recommend having each of these roles fulfilled throughout your rollout, you may find that you don't require them all to get started with your identified solutions.

Ensure Scalable Support

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Step 2: Establish Use Cases

- Identify specific use cases
- Prioritize scenarios
- Communicate value

Example: Identify Business Use Case

As someone in...
(Team)

I want to....
(Description of what I want to do)

Using...
(Specific application of the technology)

I'll know this is successful when....
(Solutions success measure)

As someone in
Sales Management

I want to
have a single version of the sales proposal that everyone has access to rather than managing multiple versions in email

Using
a SharePoint site to centrally store and share a single version of a sales proposal that my team can edit together using co-authoring in Word and PowerPoint

I'll know this is successful when
my sales team creates proposals more easily, giving them more time to close deals

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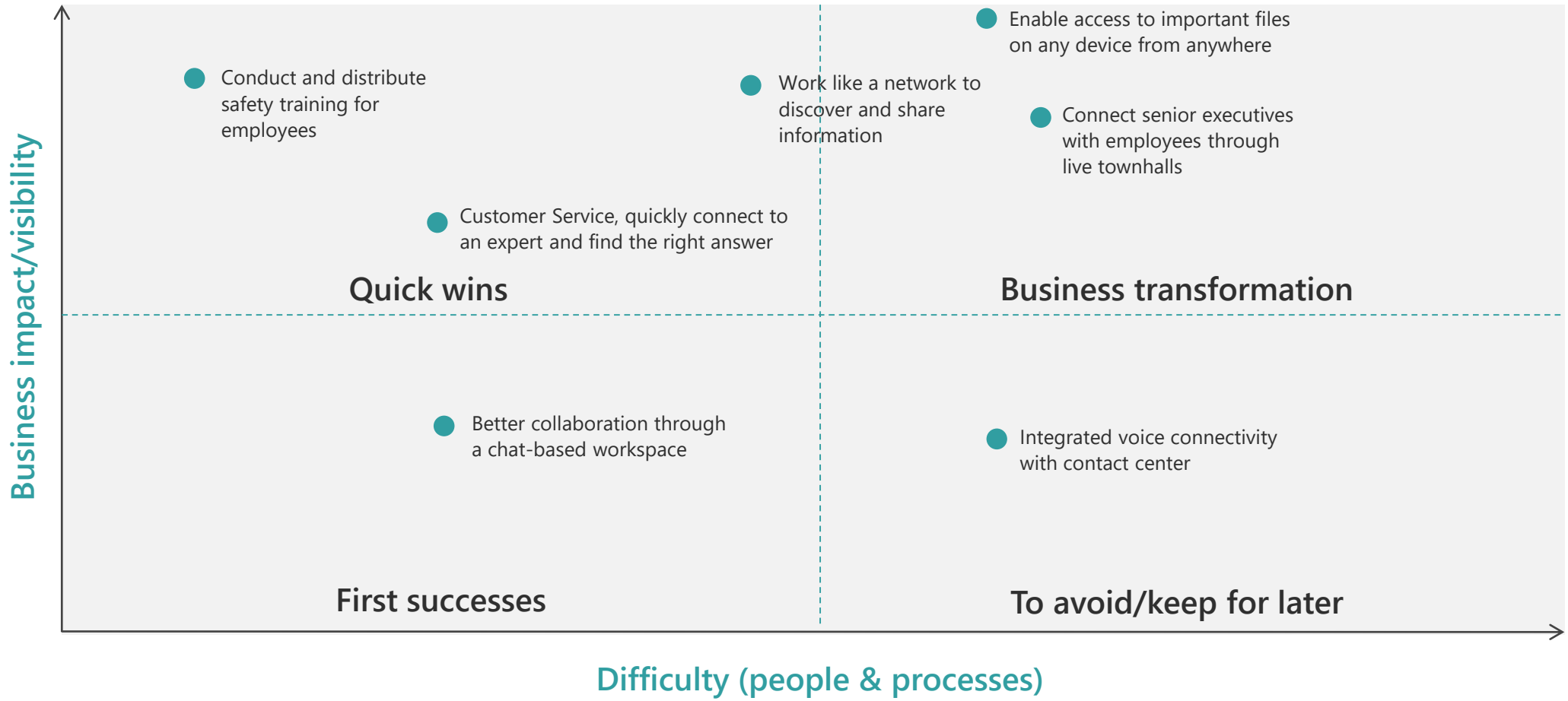
Prioritize use case scenarios by evaluating impact and difficulty



Example: Business Use Case

Employee Onboarding

Bring new employees into the department's team from day one and provide a real-time resource of information. Help new employees get up to speed as quickly as possible.

Issue

We currently have a formal onboarding process to inform new employees of processes and resources, however there are limited opportunities to educate them about our departmental culture and create a sense of inclusiveness.

Solution

Bring employees onto Microsoft Teams on their first day at the organization. By creating early adoption, employees are more likely to participate in conversations – and do so more frequently - and will be more informed at an early stage in their tenure. Employees will also be able to see conversations that happened prior to their start date, to speed up their awareness.

Benefits

- Increase adoption
- Convey department culture and benefits to employees early on
- Live FAQs for new employees
- Historically searchable

Success Metrics

- Use of Microsoft Teams by new employees
- Employee survey response after 90 days

Owner & Timeline

- HR team and Departmental Managers
- Before Summer 2019 hiring season

Step 3: Develop Contextual Learning

- Use case driven
- Multiple modalities
- Align to various phases

Microsoft

Build your training strategy

- Focus on the why
- Use real work scenarios
- Use multiple formats
- Reinforce

- What is best practice?
  - What is current vs future state?
  - Technical literacy of employees?
  - Any other change programs?
  - Training preferences of employees?

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Build capability through varying methods

DAY 1

DAY 2

DAY 3

Crawl

Walk

Run

Onsite Training	Virtual Training	Self-Help Resources	Live Support	Champions Network

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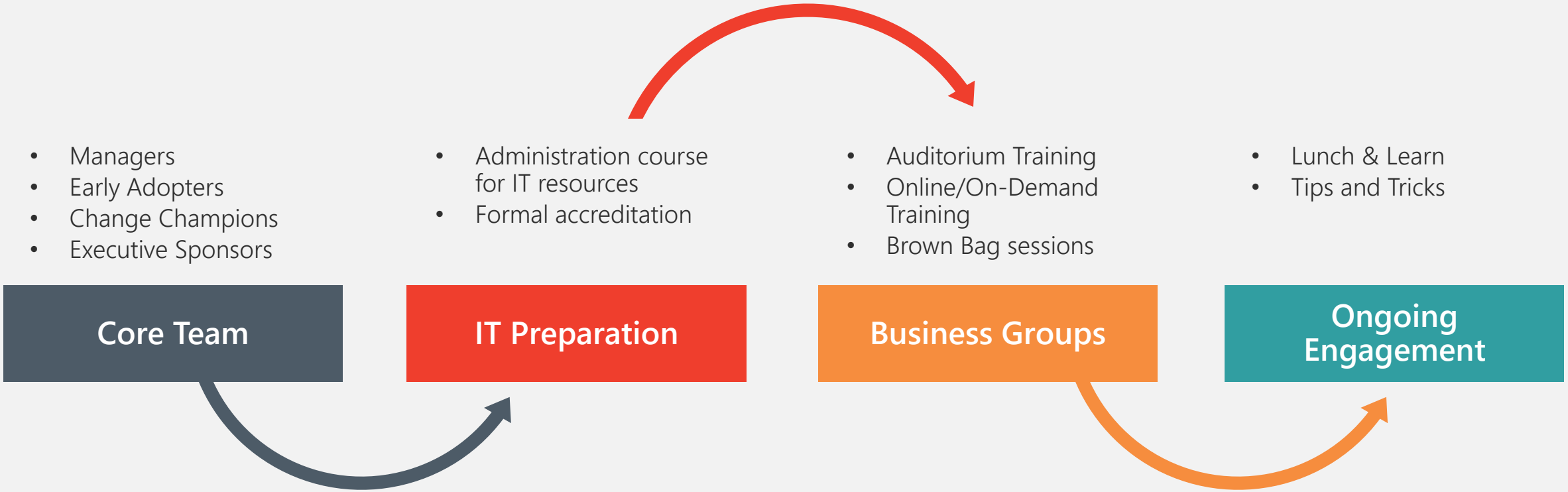
Align training strategy throughout phases



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All Employees - Needs Assessment

We need to understand the personas and the move from legacy through transition to future state

Transition State

- Big picture overview of the new environment and role in it
- New process skills/knowledge [linked to Persona and Scenarios]
- New system and technical skills/knowledge [O365]
- New organizational or role skills/ knowledge

Future State

- Big picture overview of new environment and role in it
- New process skills/knowledge
- New system and technical skills/knowledge
- New organizational or role skills/ knowledge

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All Employees - Needs Assessment Recommendations

Recommended Modalities

- **Face-to-face training –** Sponsors (1 hour), Ambassadors Training (1 hour), Change Champions (1 hour), Manager (1 hour)
- **Web-based training –** On-demand webinars, videos, Online Training (OLT) for O365 training
- **Self-paced training –** Review Theodore training activities incorporating persona and scenarios, Frequently Asked Questions (FAQ) sheets

Recommended Reuse of Existing Source Material

- Office 365 training materials, contextualized for Personas and Scenarios.

Recommended Timing

- Face to face training
  - T-7 weeks
    - Sponsor training (hosted by Theodore Margand)
    - Sponsors attend high-level training on new ways of working (Gaby Bosse and Theodore Margand lead)
  - T-6 weeks Ambassador, Champions and Managers
- Self-paced and Web-based Training to be started T-3 weeks and review self-paced training weekly to accommodate for updates ahead of auditorium training (T-1 week)

Recommended Resources to Scope, Develop, and Deliver Training

- Office 365 Training Materials (see Productivity library on Fast Track).
- Theodore Margand 1 hour training decks for onboarding each key role in the Core Change team.

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“What to Use When” Guidance

Communication
Collaboration
Information Management

Collaboration Workbook

- Microsoft Outlook
- Microsoft Teams
- HRIS, Greenhouse, & Concur
- OneDrive for Business
- SharePoint
- Yammer
- Microsoft Dynamics
- AvePoint University (APU)

AvePoint

We use many different tools to collaborate with each other. For AvePoint-specific guidance, please see the descriptions and instructions in this workbook.

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Microsoft 365 learning pathways

Home | Microsoft 365 training | Ask questions and get help | Edit

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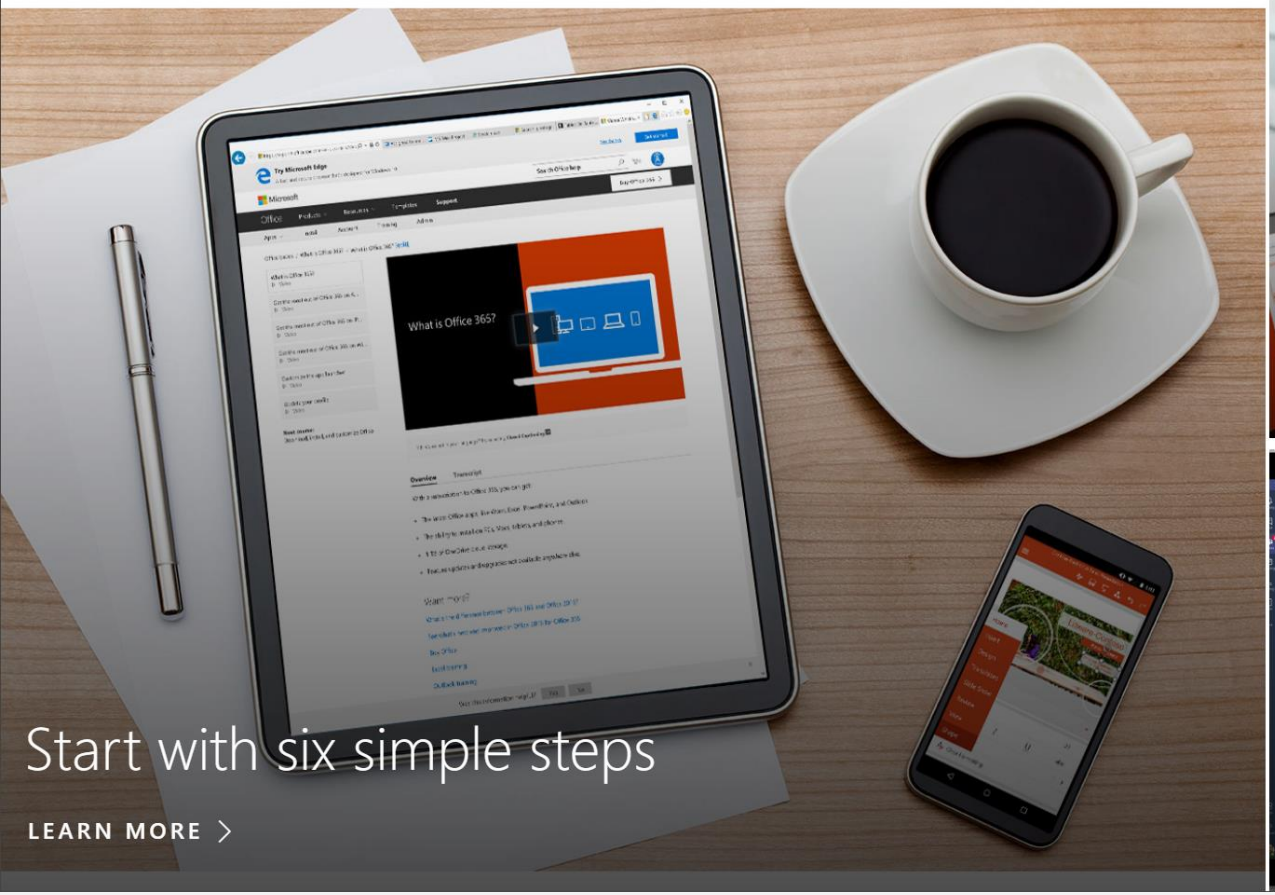

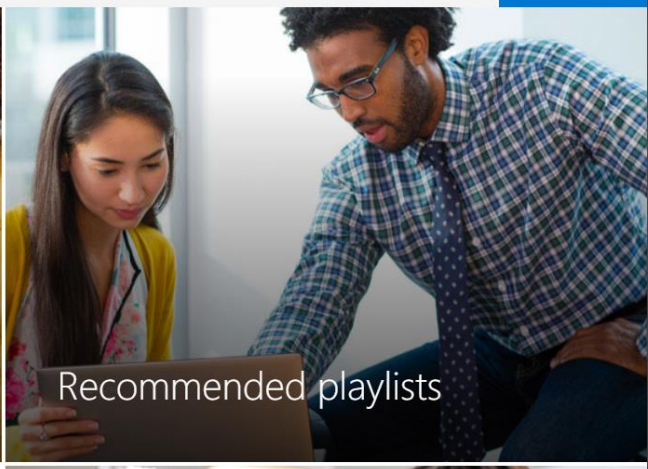

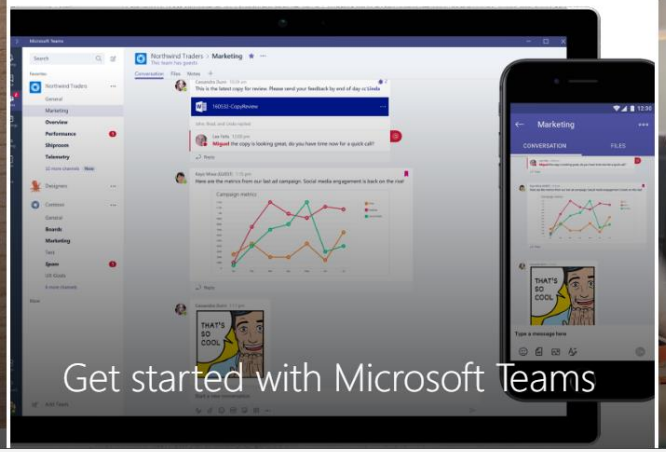

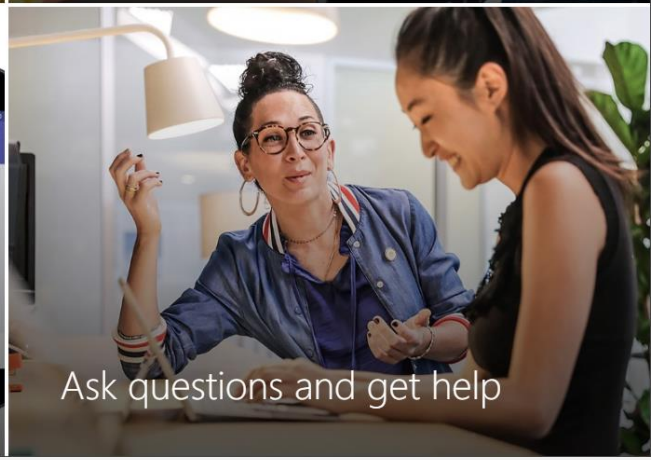

https://docs.microsoft.com/en-us/office365/customlearning/

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Step 4: Communicate & Drive Awareness

- Focus on what's in it for me
- Engagement events
- Showcase success stories

Awareness matters

Validates the importance of the change

Ensures everyone understands what's happening

Helps generate enthusiasm

Gets everyone on board with using the new technology

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Best practices to generate awareness and spark excitement

Communications

Deploy a variety of tactics

Focus on the “What’s in it for me?”

Tailor plan to company and culture

Send out communications

Engagement events

Engage Executive Sponsors to kick-off launch

Staff events with IT and Champions

Distribute banners and leaflets

Place demo booths in cafeteria/foyer

Host online events for remote offices

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Communicate value to stakeholders with scenarios

Delivering value

Review scenarios and determine the best use cases to be utilized for the organization-wide launch. Scenarios will help inform the communications plan by:

- Translating core scenarios into uses that solve real business problems
- Determining which scenarios make sense for the company to promote in its Microsoft 365 launch
- Using the resources associated with each scenario to implement email announcements and training activities

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Incorporate success stories

What makes a good success story?

- **Time.** The story should begin with a time marker so the audience knows when it happened.
- **Characters.** The story should feature names, so the audience knows who was involved.
- **Events.** The story should recount the events that took place.
- **Visuals.** The audience should be able to picture what happened.

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Step 5: Deliver 90 Day Plan

- Pilot Microsoft Teams
- Launch organization wide
- Introduce new use cases

Develop 90 Day Plan

Month 1

- Identify 3 use cases for Teams
- Engage leadership and secure buy-in
- Develop rules of engagement and how-to resources

Month 2

- Engage 3 departments/groups to pilot Teams use cases
- Identify what works and what doesn't with use cases then modify
- Configure Teams to support use cases for company wide deployment

Month 3

- Launch use cases company wide
- Encourage leadership to consistently promote and adopt the use cases
- Showcase and highlight wins of adopting Teams

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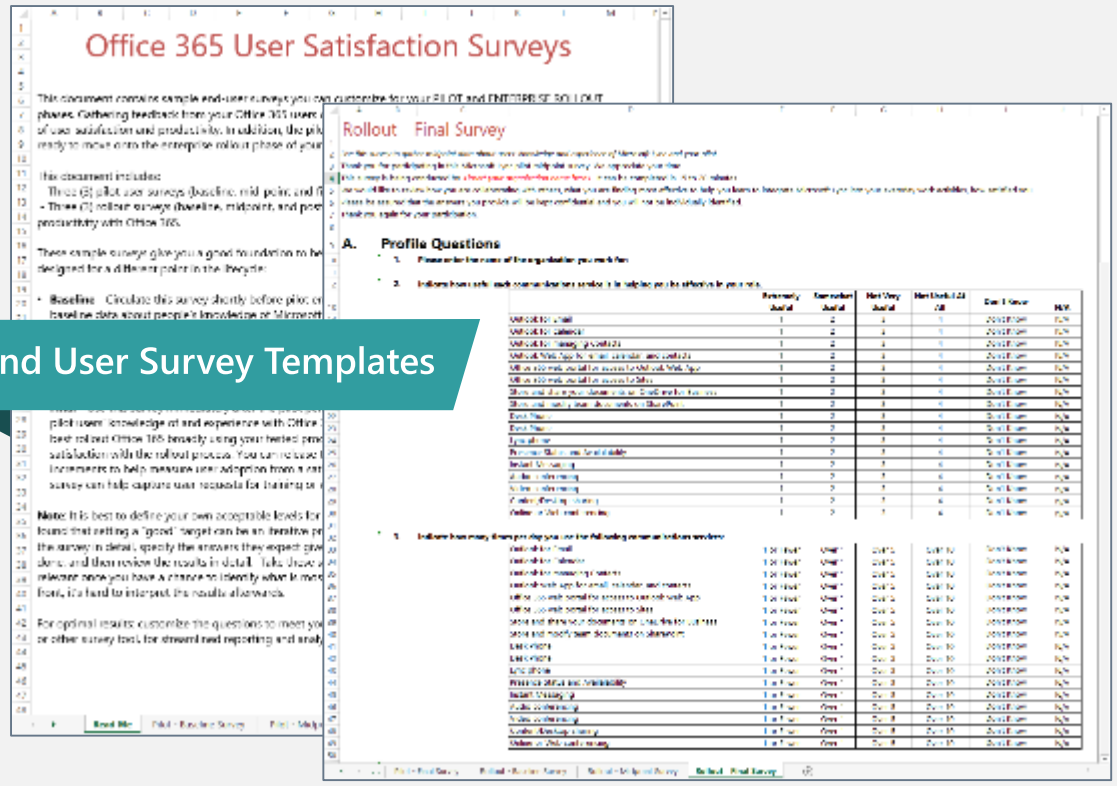
Evaluate, Adapt & Iterate

5

Continuously Drive Engagement



End User Survey Templates

Success Criteria	Method/Source	Metrics	Example Goal
Increased adoption: Increased usage correlates to user adoption of the technology.	Quantitative: • Office 365 reports	• Mailbox usage • SharePoint usage • Lync IMs and conferences • Minutes of Lync audio used	Comparison of pre- and post-rollout usage reports will show increasing adoption of 10% per month.
Training effectiveness: Increased usage correlates to training effectiveness.	Quantitative: • Office 365 reports Qualitative: • End user surveys	• Mailbox usage • SharePoint usage • Lync IMs and conferences • Minutes of Lync audio used	Comparison of pre- and post-training usage reports will show increasing adoption per month. Employee Net User … score is 130+ … the final training

[Customer Name]
Pilot Success Criteria Status

Overall Status

#	Metric	Measurement	Goal	Actual	Trend	Status
1	Acceptable Lync Call Quality	Percentage of poor quality calls	< X%	Y%	↑	↑
2	Conferencing User Adoption	Users who have organized at least one conference	X%	Y%	↑	↑
		Total amount of Lync hosted audio conferencing minutes	X # or more			
		Conferencing statistics shows increased adoption as the pilot progresses	Previous week adoption: X			
3	User Acceptance of Lync system	User survey satisfaction score	X			
4	Help Desk able to support Lync	Average time to close support ticket	X	Y	↑	↓
5	Lync Operationally Ready	Time to resolve open monitoring events	X	Y	↔	↔
		Session success rates	P2P Audio: X%	P2P Audio: Y%	↔	↔
			P2P App Sharing: X%	P2P App Sharing: Y%	↔	↔
			Conf App Share: X%	Conf App Share: Y%	↔	↔
			Conf A/V: X%	Conf A/V: Y%	↔	↔
			Conf Join: X%	Conf Join: Y%	↔	↔
6	User Communications and Training	User survey satisfaction score	X	Y	↑	↑
7	Lync Meets SLAs	Comparison to production SLAs	Recovery: X	Recovery: Y	↔	↑
			Availability: X	Availability: Y	↔	↑

Success Criteria Examples

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… and Measure Success

Achieve real business relevance by measuring your outcomes in terms of ROI. Use enterprise social engagement data to support your findings.

Business Value Opportunity	How did SharePoint help?	What was achieved?	How is it measured?
Team Collaboration	Streamlined collaboration across regions and teams to execute go-to-market strategy.	Increasing global spread of business.	15% improvement in increasing number of successful innovations for new products or services.
Employee Engagement	Find experts and information fast.	Time saved in searching for assistance with Sales training.	30% improvement in access to experts and knowledge.

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∞ Lather, Rinse, Repeat

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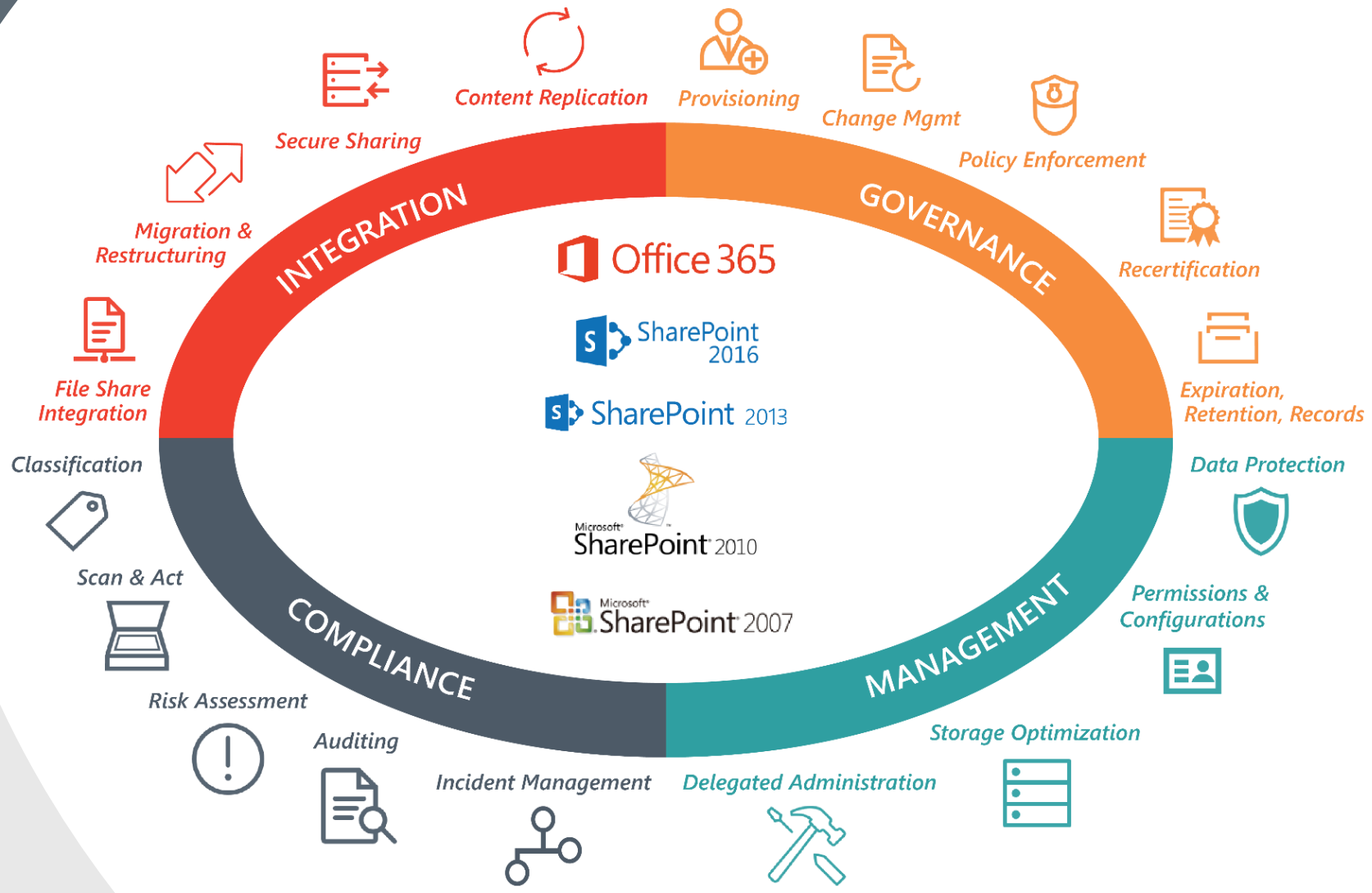
What We Covered

- The New Culture of Teamwork
- Centralize Work in a One Stop Shop
- Enable Business Solutions
- Make it Easy to Do the Right Thing
- Drive Sustainable Adoption

AvePoint's Solution Platform

Millions of users count on our software to integrate, manage, govern, and meet compliance requirements throughout their content's lifecycle, across SharePoint environments from 2007 to Office 365 across commercial and government clouds and on premises



Helping you Prepare for What's Next

Teams Governance Workshop

Define and Clarify Governance in the context of Teams, help identify goals of Teams in the organization. With this tailored and interactive workshop, understand Teams best-practices and get started on the right path with a pointed recommendations summary.

- Workshop Materials
- Meeting Notes

Teams Governance Assessment

In addition to Teams Governance Workshops, AvePoint will help provide a Starter Teams Governance Policy outline, along with a Best Practices Assessment and a mapping exercise of 3x Business Units to Governance policies for Teams use cases.

- Completed Workshops
- Summary Meeting Notes
- Executive Summary (PPT)
- Best Practices Assessment (DOC)
- Starter Governance Policy Outline

Teams Governance Pilot

Provide a detailed analysis of the current state and the tools and techniques to implement IT governance. Map key business units to our analysis of IA, O365 tools, and governance recommendations. Execute a Governance Pilot/POC using O365 and AOS.

- Completed Workshops
- Summary Meeting Notes
- Executive Summary (PPT)
- Strategic Roadmap (DOC)
  - Breakdown of O365 Tools
  - Info Architecture Analysis
  - User Adoption Methodology
  - Governance Policy Outline
  - Roadmap and Recommendations
- Governance POC (O365 and AOS)

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Additional Resources

- Success with Teams Adoption Hub
- Microsoft Learning Pathways
- Transparent White Board Demo
- AvePoint's Teams Learning Series
- Microsoft Certified Service Adoption Specialist
- Webinar: Microsoft Teams and Information Management: What You Should Know!

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Join us at

SharePoint Saturday Charlotte

December 14th, 2019

SCAN ME

FREE one-day event featuring sessions from influential and respected SharePoint professionals.

Charlotte Teams User Group

https://teamsug.com/user-group-location/charlotte-nc/

Recent Event: November 19 HERE!!

thank you

Gracias	ευχαριστώ	Danke	Grazie	благодаря
Hvala	Obrigado	Kiitos	شكراً	Tak
Ahsante	Teşekkürler	متشكرم	Salamat Po	감사합니다
Cám ơn	شكريه	Terima Kasih	Dank u Wel	Děkuji
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谢谢	Tack	Mulţumesc	спасибо	Merci
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