



# Accelerate Your Line of Business with Microsoft Teams

Microsoft  
Partner



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

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@JayLeask | @AvePointGov  
Principal Solution Engineer



Eddie Lee  
Senior Solution Engineer



Accessible content is available upon request.



# The Day

9:00 am: Kickoff

12:00 pm: Lunch Break





# Activity: All About *Teamswork*

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## *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

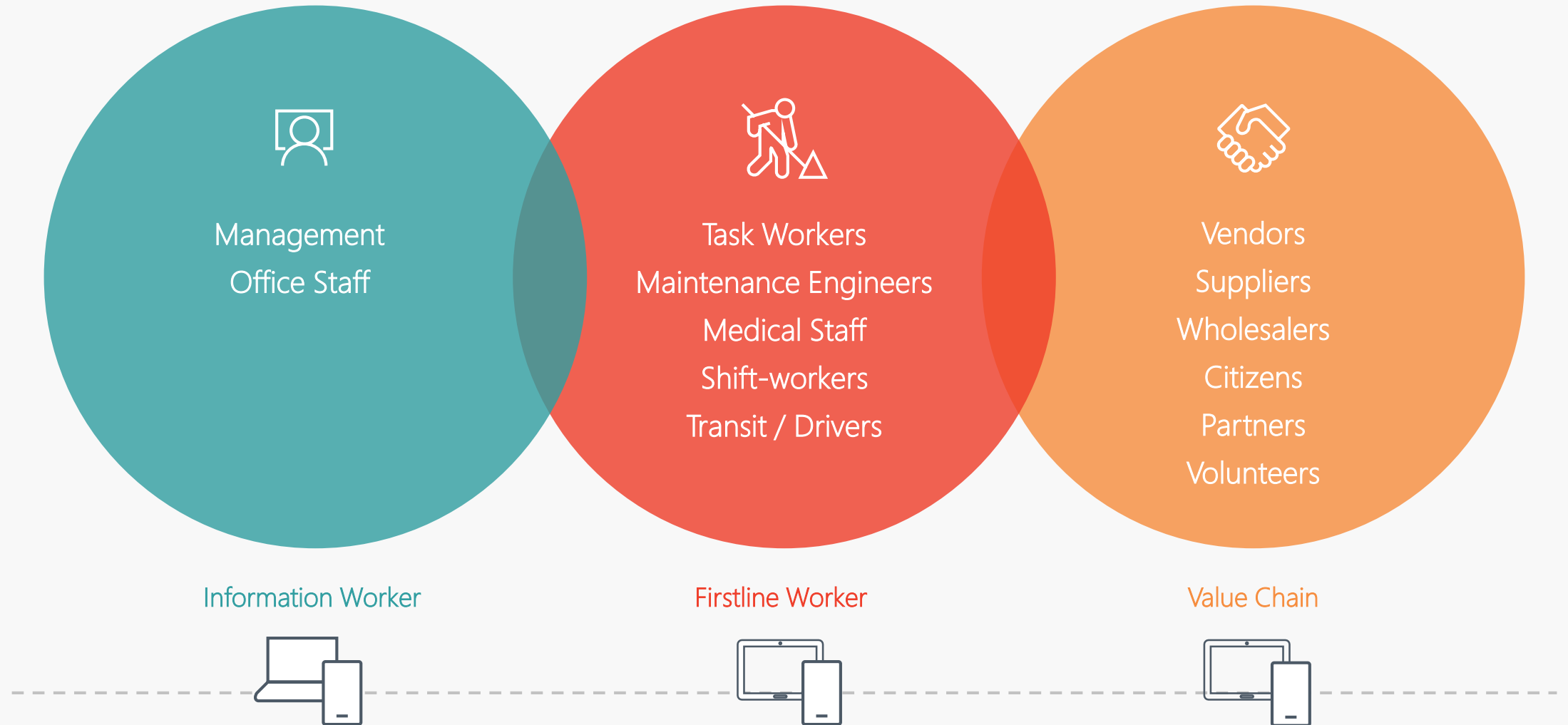




# The New Culture of Teamwork



# Today's modern workforce







## 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

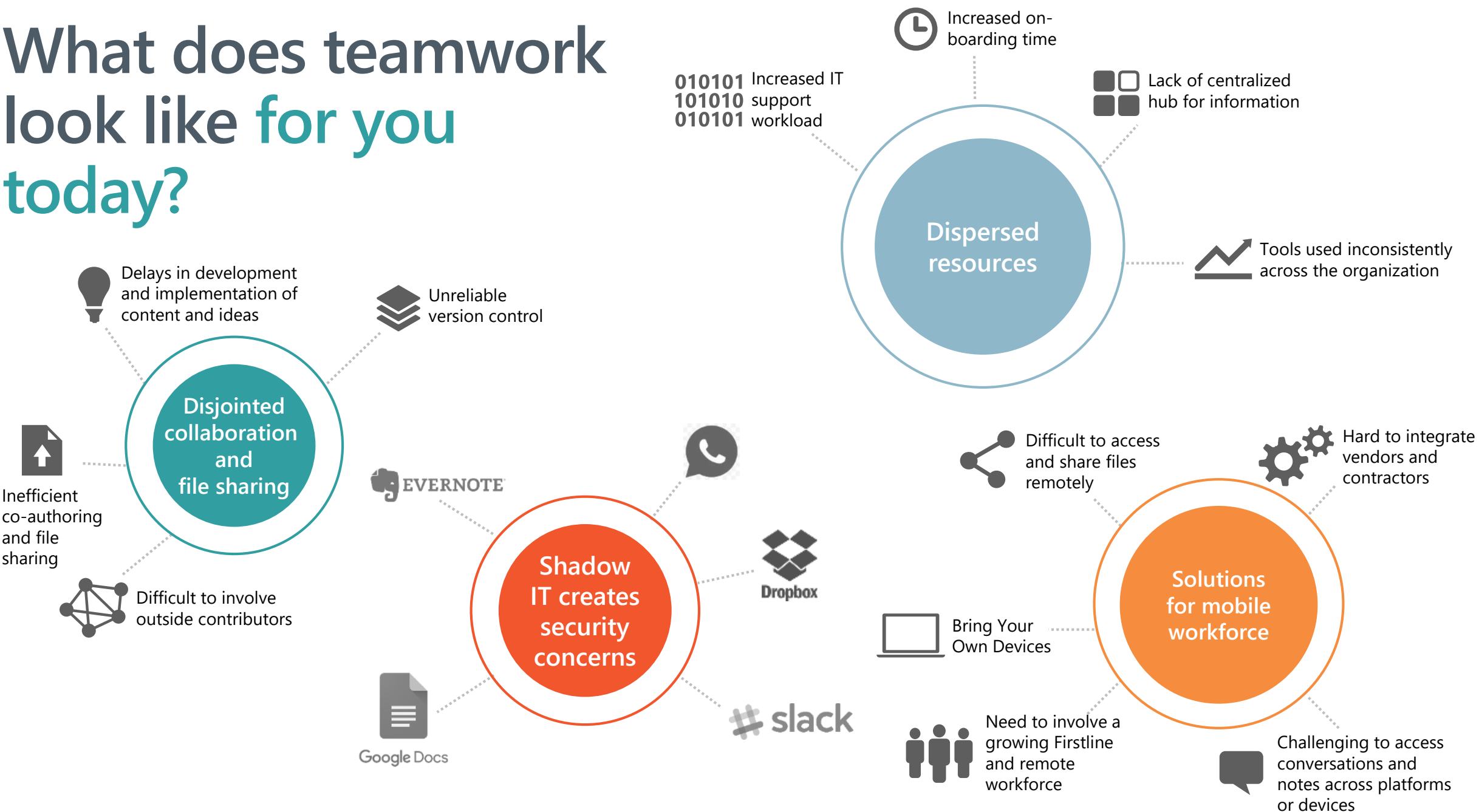
*2018 OPM Status of Telework in Federal Government Report*



### Team-based Collaboration

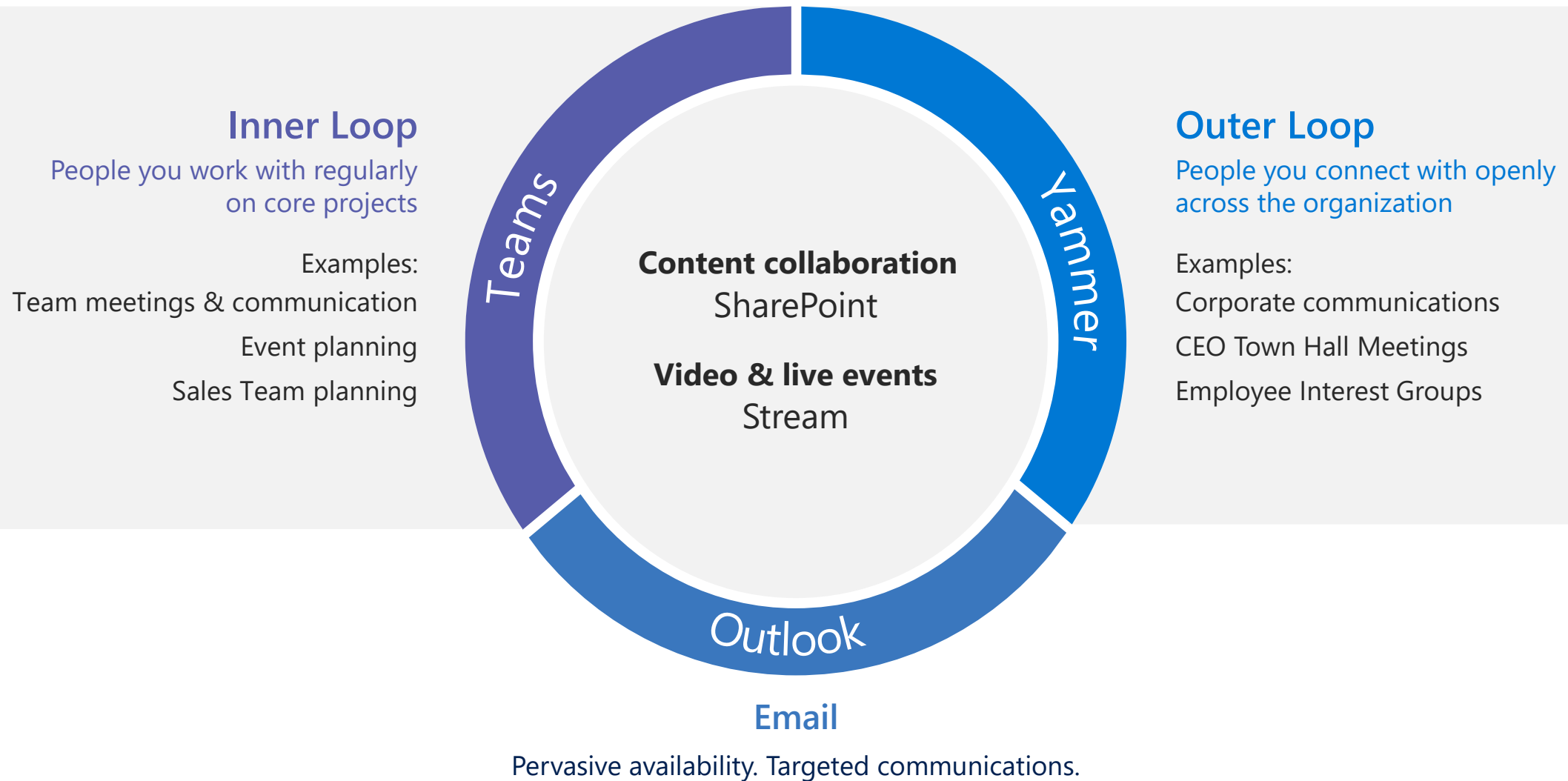
80% of employee time is spent “collaborating”

# What does teamwork look like **for you** today?





# Teamwork in Microsoft 365



# Microsoft Teams

The hub for teamwork in Microsoft 365



Persistent 1:1 & Group Chat



Enhanced Collaboration

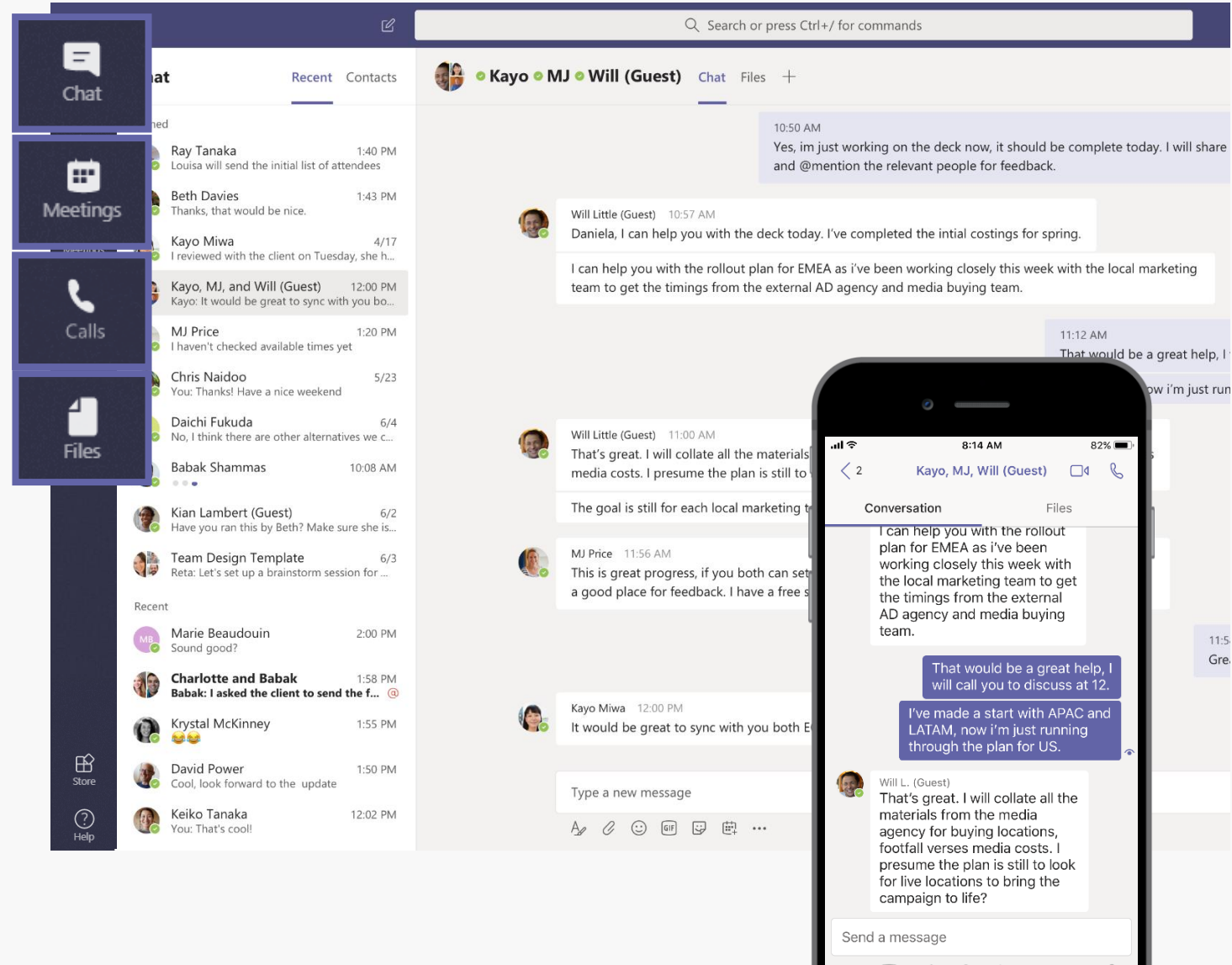


Enterprise Communications



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**

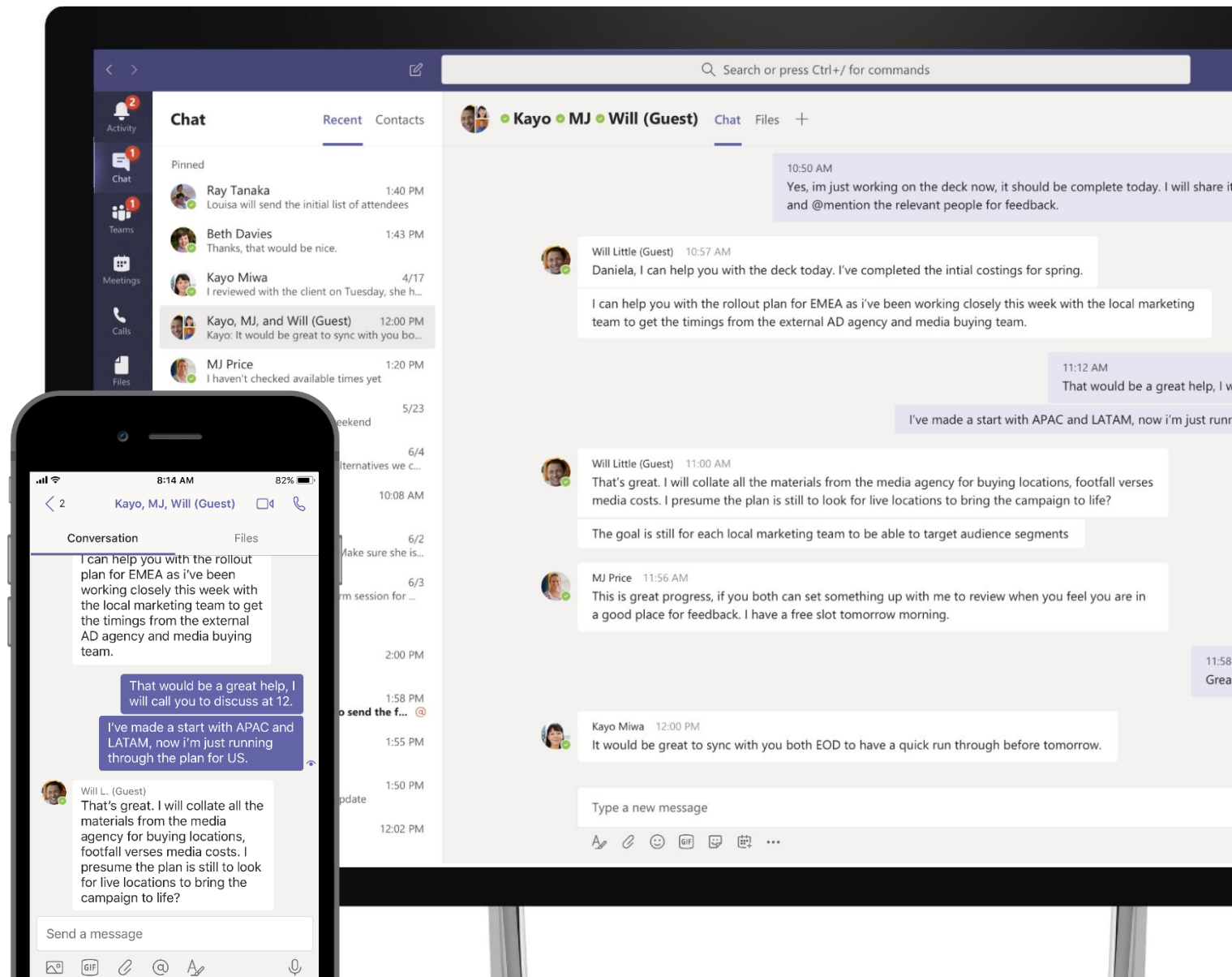
Manage private conversations with new **secure private channels**

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

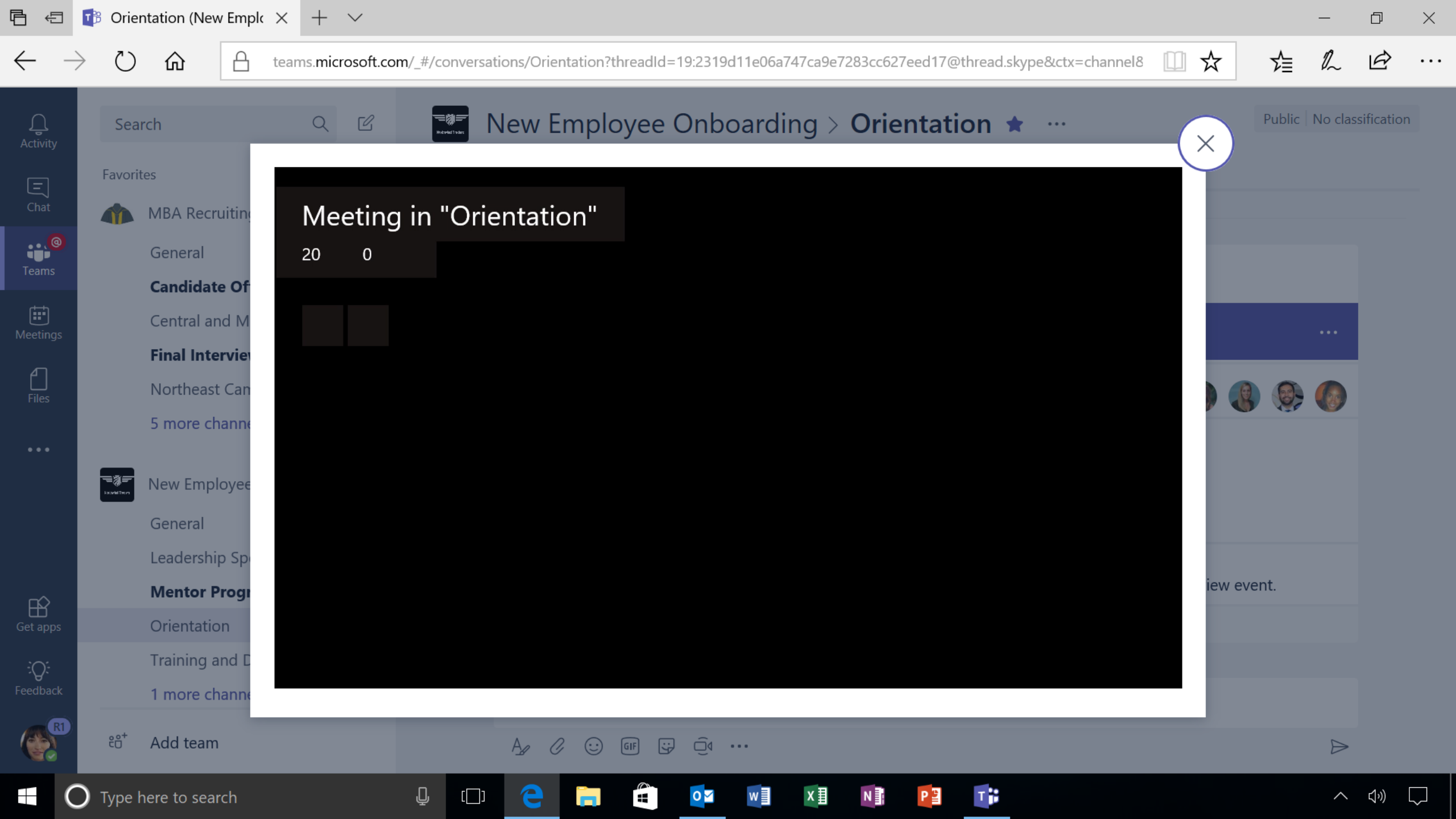
Make meetings more effective by having meeting history and **relevant content at your fingertips**

**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







# Communicate through calling

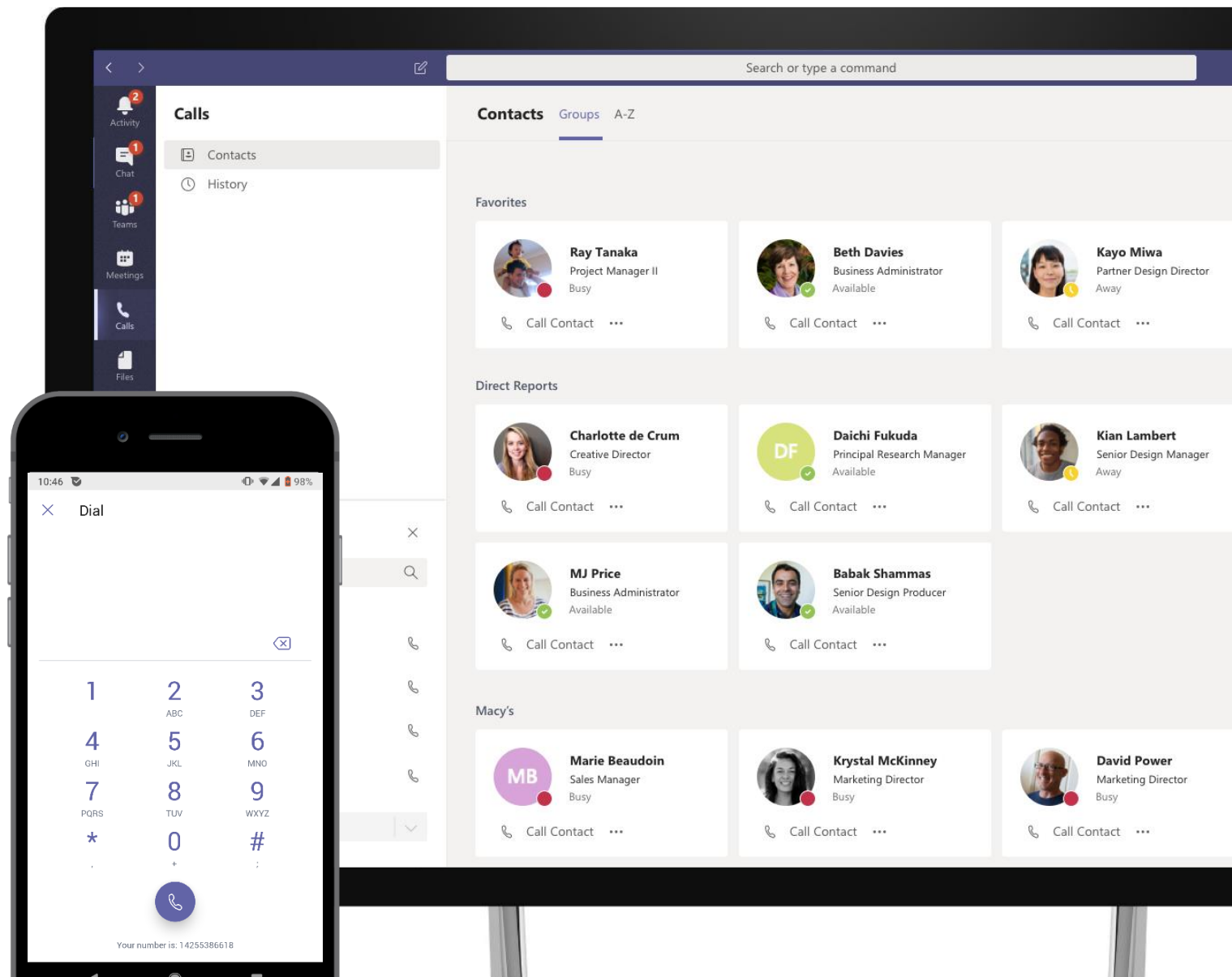
Connect with anyone through Phone System, Calling Plans, or Direct Routing

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

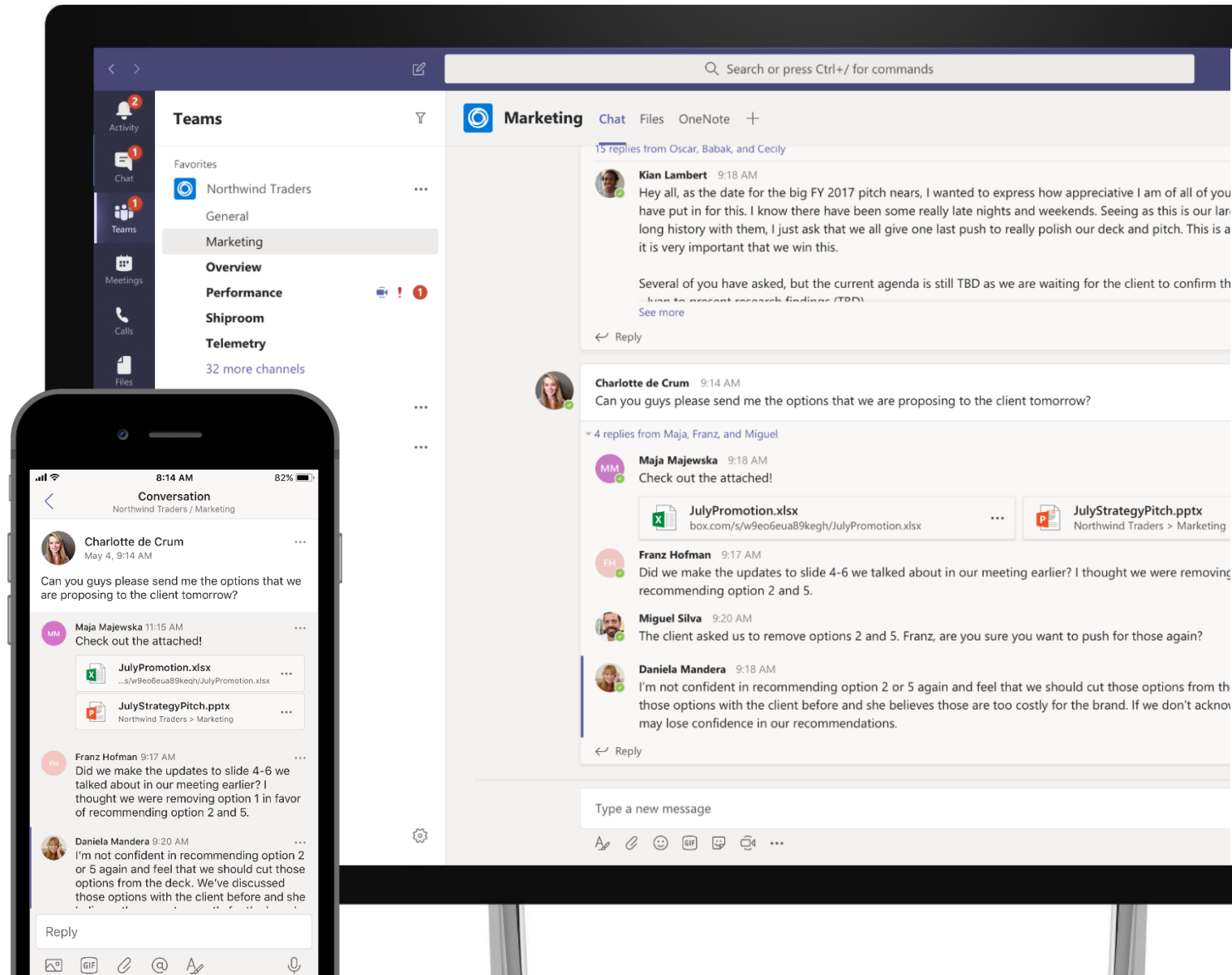
Quick access to the apps you love

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**

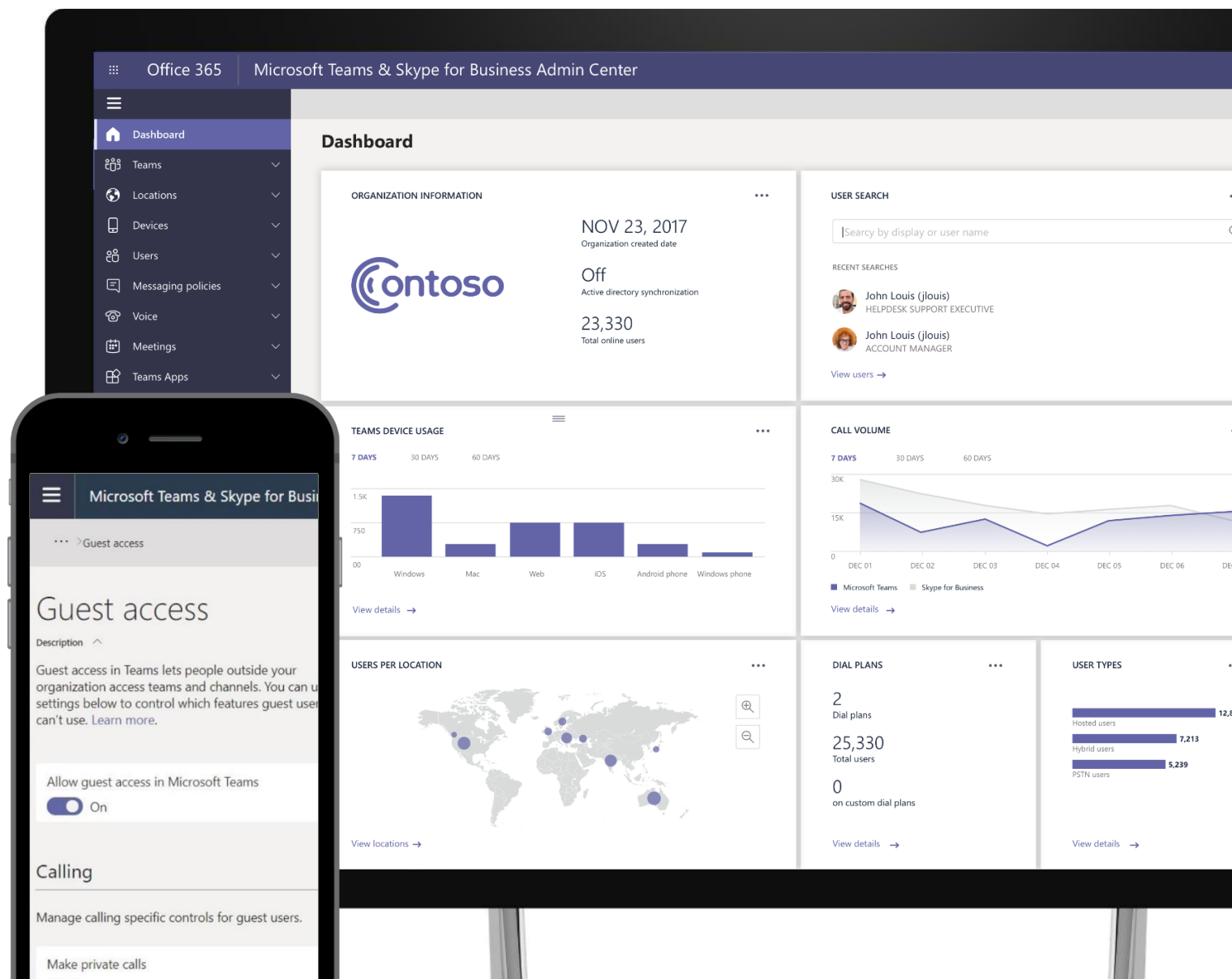
**Global hyper-scale cloud**, including ability for local data residency and global peering points for meeting join

**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



Alex Wilber  
Marketing Assistant



Ben Walters  
VP Sales



Lidia Holloway  
Product Manager



Henrietta Mueller  
Marketing Assistant



Irvin Sayers  
Director



Miriam Graham  
VP Marketing

*WHO you're collaborating  
with...*



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



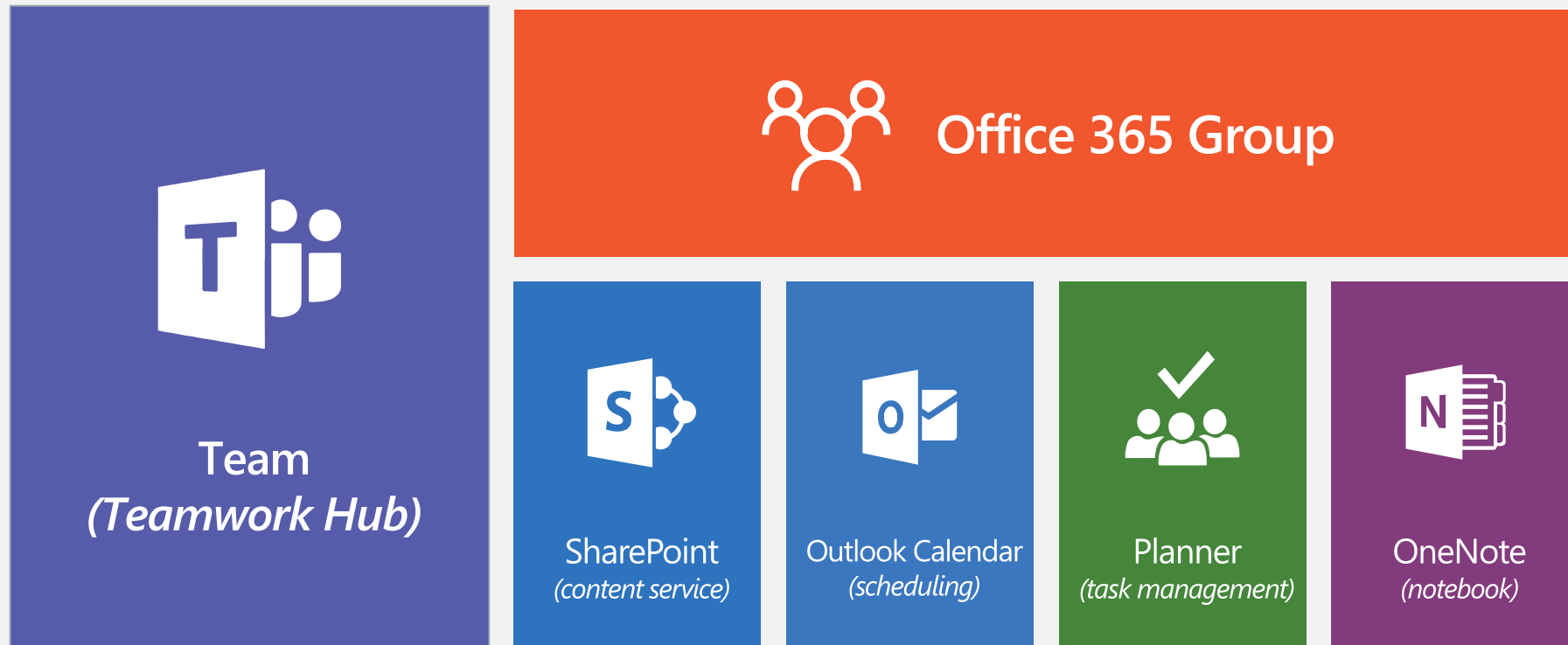
**Customize & Extend:** 3rd party apps & existing systems



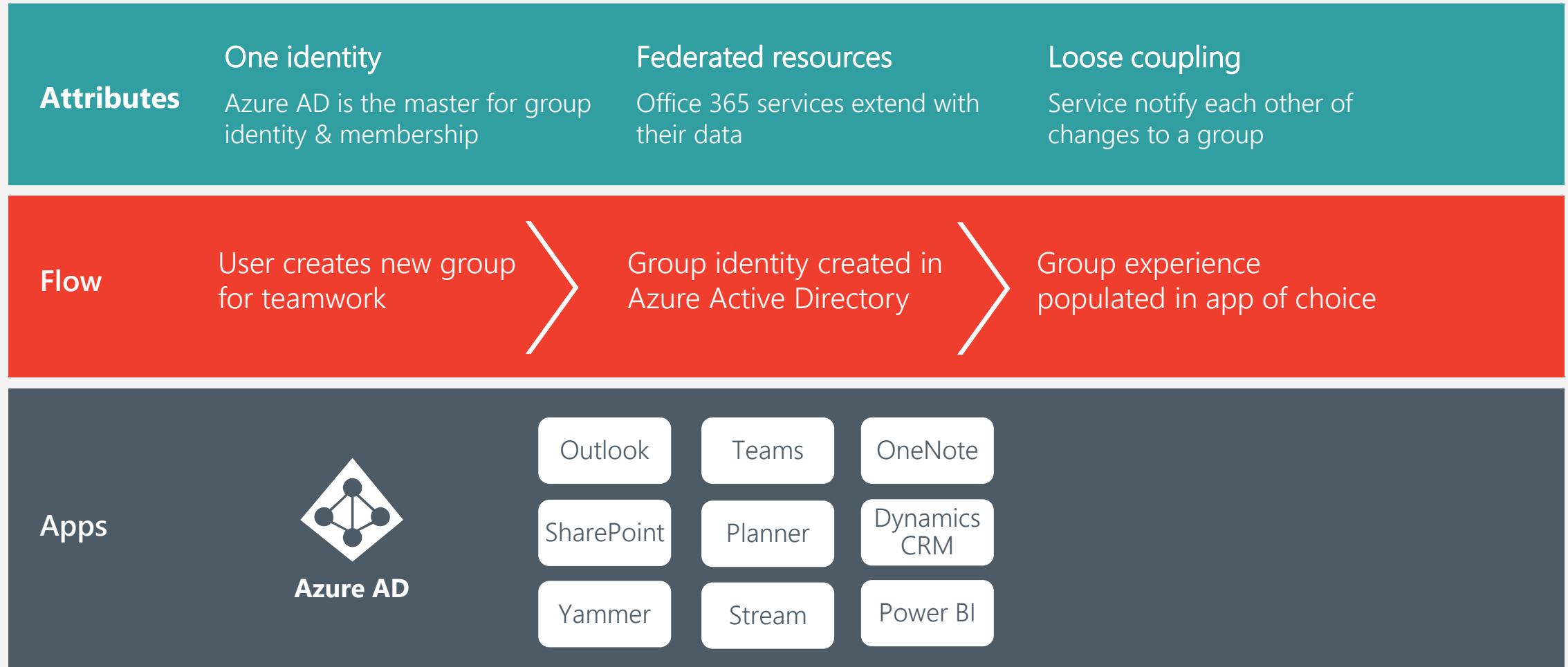
**Work w/ Confidence:** Enterprise security, compliance & manageability



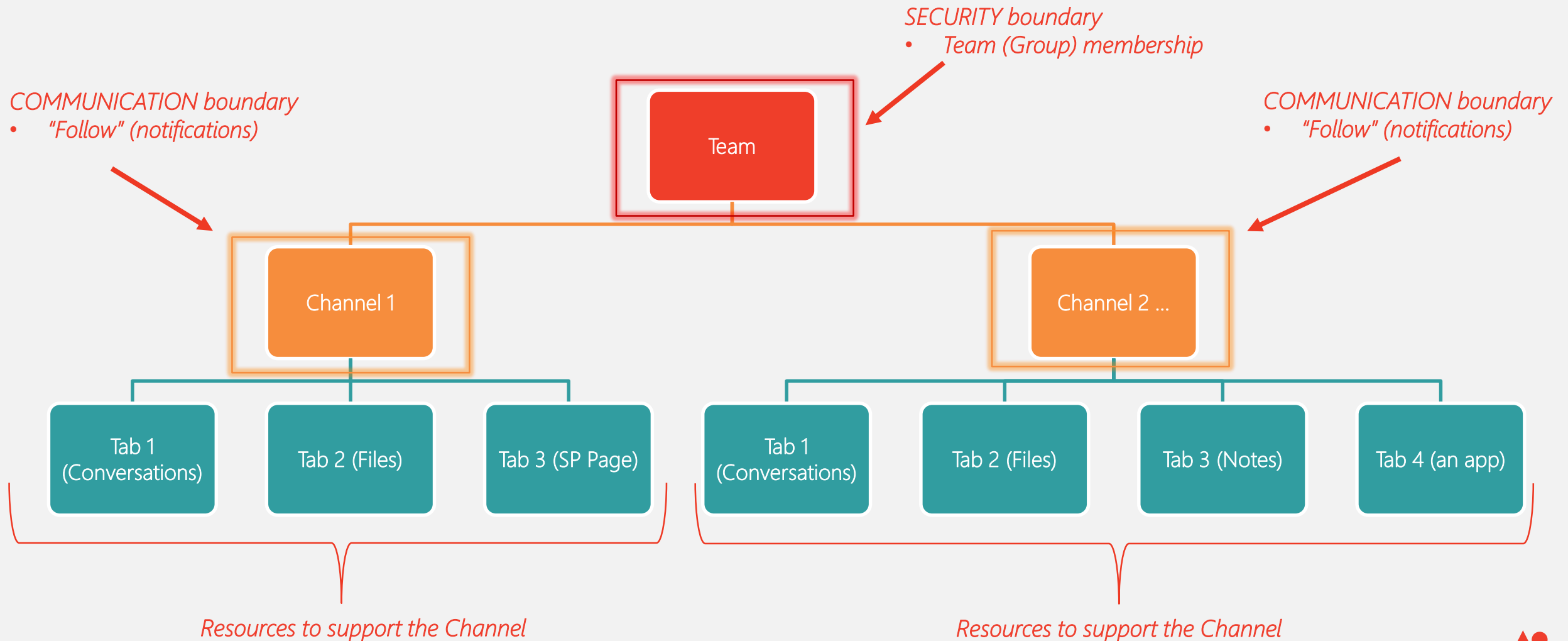
# When Creating a Team ...



# Office 365 Groups = Membership Service



# The basic shape of a Team






# Teams and Channels

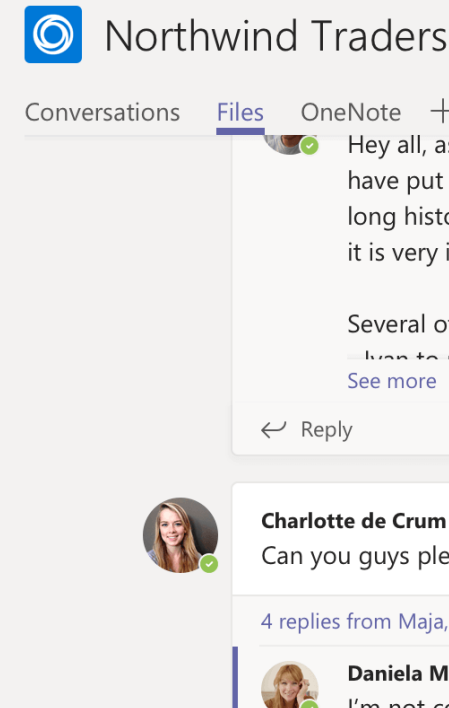
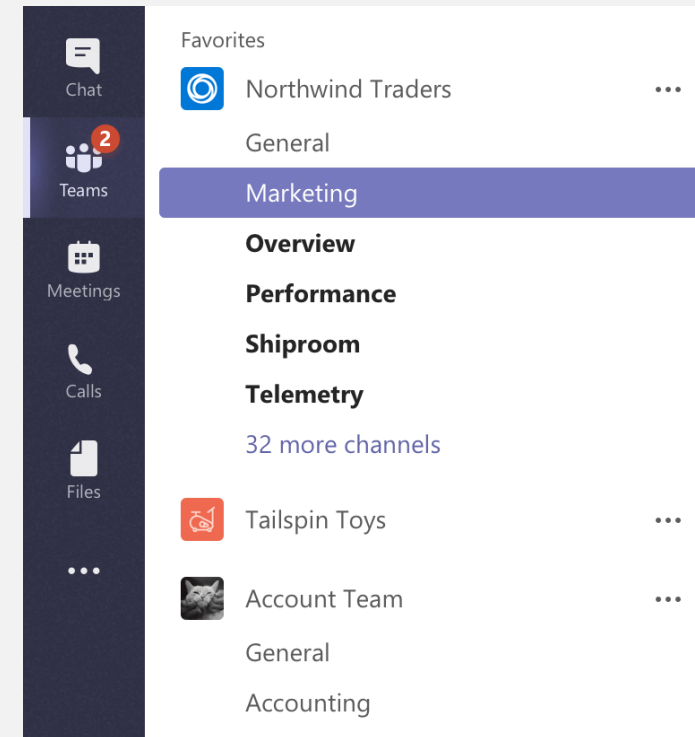
## Pick a team and channel

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

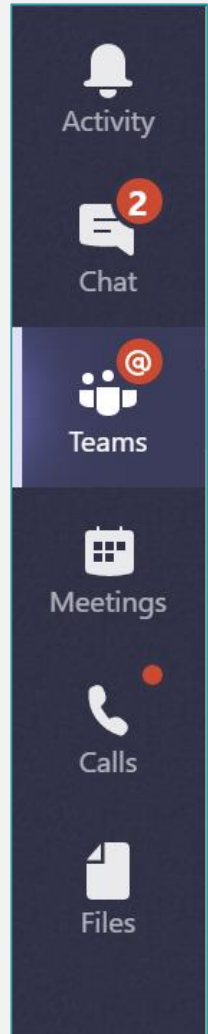
A *channel* is a discussion in a team, dedicated to a department, project, or topic.

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.



# 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



# Understanding the SharePoint and Teams relationship

The screenshot illustrates the relationship between a Microsoft Teams channel and its corresponding SharePoint document library. On the left, the Teams interface shows a sidebar with navigation options: Activity, Chat (with 2 messages), Teams, Meetings, and Calls. The main area displays the 'BGLeads' team with a list of channels: General, BG Virtual Stand-up, BG-Dev Workshop 2018, GTM-Sales, Product Strategy, Project Tasks, SP 2019, and Technical Partnerships. On the right, the 'BGLeads' SharePoint document library is shown, featuring a 'Documents' list. Red arrows connect the channels in the Teams interface to the corresponding folders in the SharePoint document library: 'General' to 'General', 'BG Virtual Stand-up' to 'BG Virtual Stand-up', 'BG-Dev Workshop 2018' to 'BG-Dev Workshop May 2018 C...', 'GTM-Sales' to 'GTM-Sales', 'Product Strategy' to 'Product Strategy', 'Project Tasks' to 'Project Tasks', 'SP 2019' to 'SP 2019', and 'Technical Partnerships' to 'Technical Partnerships'. The 'Field Feedback' folder is highlighted in yellow in the SharePoint view.

Channel	Document Library Folder	Modified
General	General	November 17, 2017
BG Virtual Stand-up	BG Virtual Stand-up	July 16
BG-Dev Workshop 2018	BG-Dev Workshop May 2018 C...	April 24
GTM-Sales	GTM-Sales	August 14, 2017
Product Strategy	Product Strategy	August 14, 2017
Project Tasks	Project Tasks	6 days ago
SP 2019	SP 2019	July 3
Technical Partnerships	Technical Partnerships	August 14, 2017



# Departmental Teamwork in Teams

Activity

Chat

Teams

Calendar

Calls

Files

AVA

...

Apps

Help

Your teams

AvePoint Marketing

General

Articles

ChewNChat Video Series

Comms

Ideas

Lead Routing and Management

Photo of the Day

Requests

SH Podcast

9 hidden channels

APSLT

Marketing Leadership

Field Marketing

Arlington Office

Hidden teams

Join or create a team

TEAMWORK

AvePoint Marketing > General ...

Private

Conversations

Files

Requests

Intranet

Yammer


Web Requests (JIRA)

Power BI

1 more

+

July 31, 2019



Joanne Chang

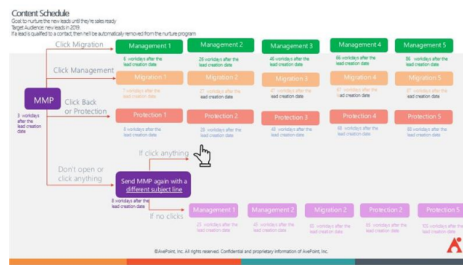
1/30 9:35 PM


7

@

Dux Raymond Sy Michael Segner Amanda Barnes Jessica Ko I'd like to share the nurturing email campaign that AU team's working on. The purpose of the campaign is to engage with new leads moving forward, keeping them posted with our awesome content, ebooks, on-demand webinars, blogs etc. The content people are gonna receive will be based on what / if they click (see attached content schedule). Basically we have 4 streams - Migration, Management, Protection and 'No clicks' (for people who don't click anything we'll send our most popular content to capture

[See more](#)






Login | Marketo

Login to Marketo

app-ab04.marketo.com

▼ Collapse all



Michael Segner

1/31 11:36 AM


Edited


4

Wow, first off *really* impressive work. What a sophisticated nurture design! Here are some thoughts, happy to discuss further:

- LOVE the segmented campaigns based off of clicks (or no clicks). The thing that pops out to me here is that it looks like your nurture campaign lasts across 3 months. Have you thought about extending it across a whole year (funding cycle)? You could extend it across 6 months and cast it twice.

Start a new conversation. Type @ to mention someone.

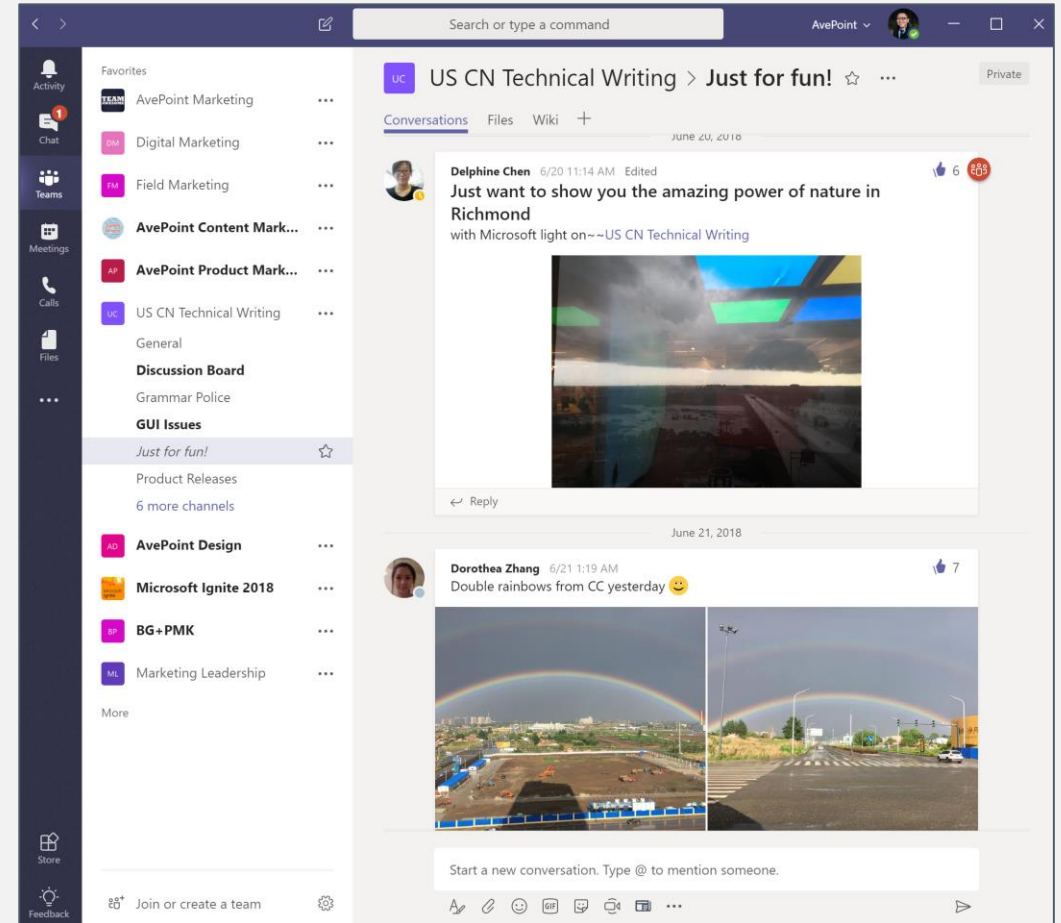
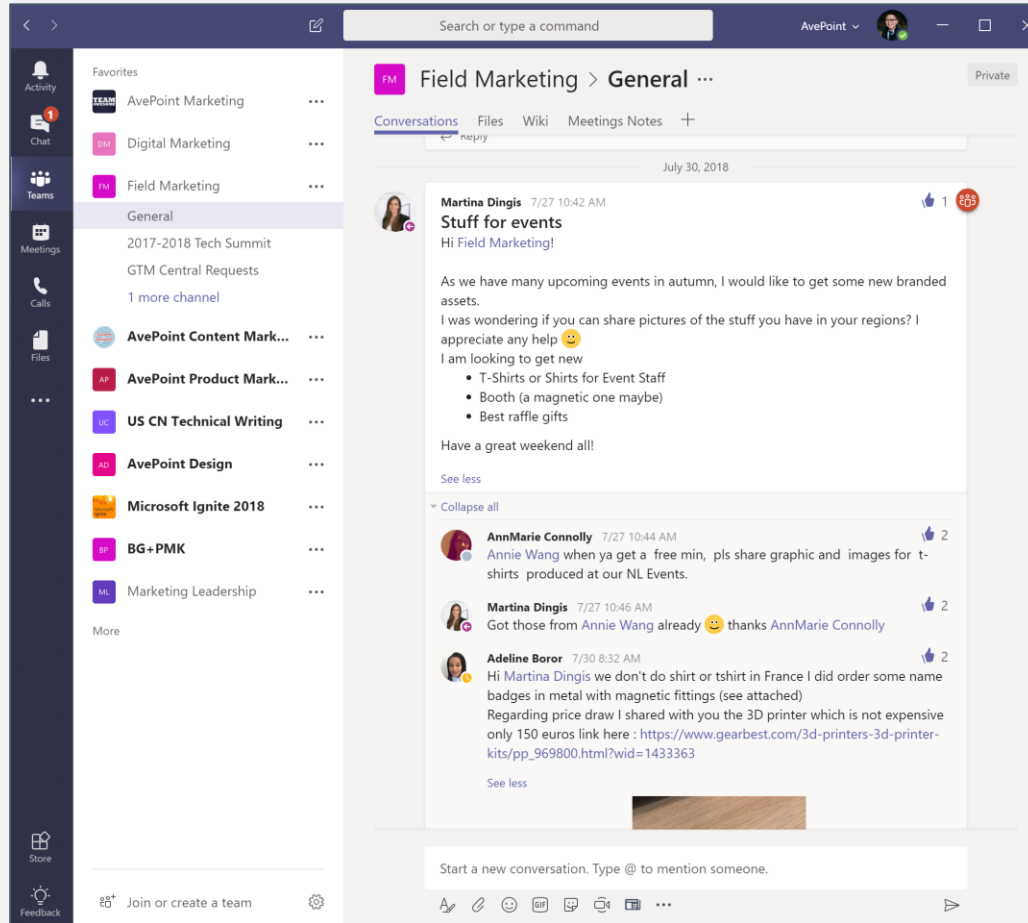




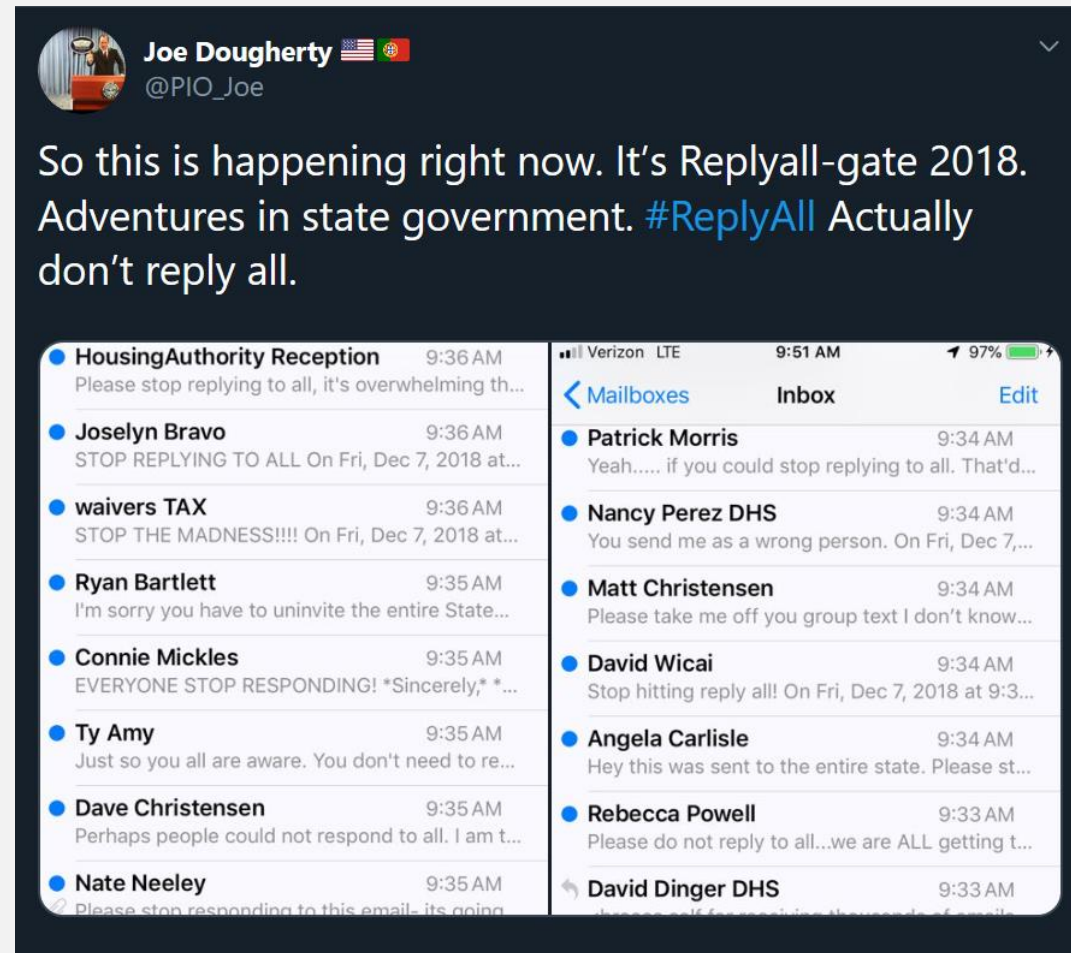
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# Example: Global team collaboration



# Don't you love Reply All?



# Group Communication in Teams



Spenser Bullock 7/1 10:48 AM

IMPORTANT!

New Webinar! 8/7: Delegating Administration

Hello everyone, we have a webinar on 8/7 at 11am EST/8 PST. We will feature **Dux**, John Peluso and **Hunter** for "Tailoring Microsoft Teams & Delegating Administration in Office 365"

[Landing Page](#)

[Graphics Page](#)


Can the following that are tagged please help with distribution/promotion?

- Megan for organic and paid social efforts
- Sarah, Katie and Skylar for connecting to sales
- Brent for CTA on anything around Office 365 compliance or anything else you can think of?
- Chandler and Mikayla can we incorporate this into our newsletter or any other customer comms?

\*Please note that the social media graphics have been updated and should be visible when you share out the link\*  
Please let me know if there is anything you need!

FYI: Michael, Chisa, Joanne, Martina, AnnMarie, Oscar Jessica, Annie, Isabelle

[See less](#)



**Tailoring Microsoft Teams & Delegating Administration in Office 365 | AvePoint**  
Learn how to give departments in the same Office 365 tenant different policies for provisioning, external sharing, and more.  
[www.avepoint.com](https://www.avepoint.com)

11

@

Unsave this message


Mark as unread

Copy link

Immersive Reader


Turn off notifications

More actions




Martina Dingis 7/2 5:16 AM

Annie Wang Eva Wang Spenser Bullock I would like to invite the DACH database as well. Spenser, can you please copy the email invite and share with Eva so we can translate?




Spenser Bullock 7/2 6:29 AM

Yes, will do!




Spenser Bullock 7/15 11:00 AM

**NEW UPDATE:** Hi everyone! We are looking to break our current webinar registration number and get to 1000 registrants for this webinar, **can we please have all hands on deck to promote and push this out to as much as possible?**



Sarah Zalesiak 7/15 11:02 AM

Megan Hoel can you craft some copy for the sales teams to share out on their social channels? thinking something they can push out on their feeds as well as something they can send via linkedin messaging




Michael Segner 7/15 11:08 AM

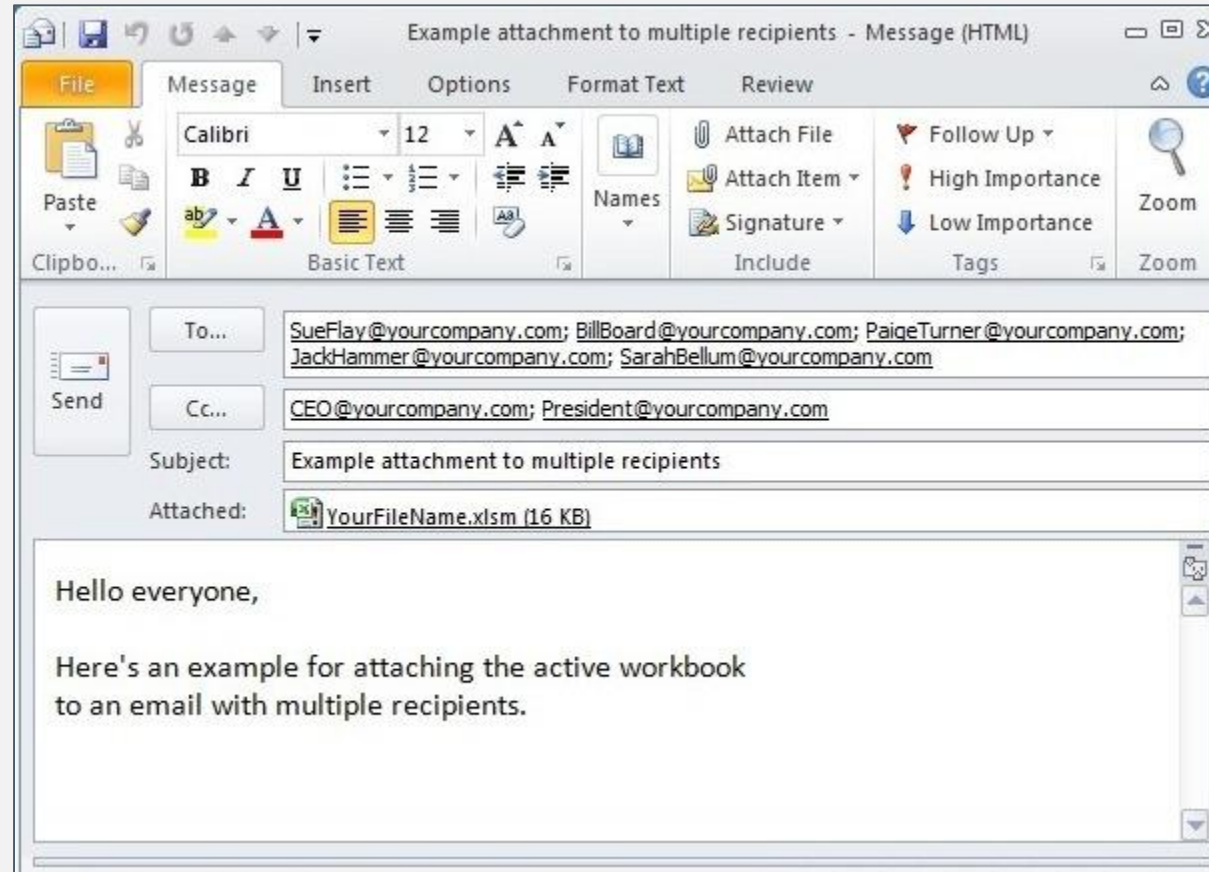
Brent Middleton can we include this as the top CTA on the top 15 blogs that get the most traffic currently?

← Reply

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# Document Collaboration via Email





# Document Co-Authoring in Teams

**Citizen Services 1.3.1**

Citizen Services 1.3.1 represents a number of high-value features that expand the capabilities and enhance the flexibility of the platform. The release is about helping customers dial in those specific, granular settings that speak to their unique business processes.

### Smart Forms

One of the features customers love about Citizen Services is the “WYSIWYG” form editor. Even users with no technical skills are able to design and create forms that their constituents use to submit service requests. Well, those forms have just gotten smarter in two important ways!

- Conditional Logic to Show/Hide fields**  
Conditional logic can be added to the form so that certain fields on the form will only appear if specific conditions are met. For example, a form for reporting abandoned vehicles may have a field to indicate whether the car has a license plate. If the user selects “yes”, a new field can appear where the user can enter the license plate number, and conversely, that field will disappear if the user selects “no.”

*Figure 1: Show or hide fields based on other form selections.*

This capability makes for much more usable forms by hiding irrelevant fields, and opens opportunities for previously unsupported use cases.

- Cascading Dropdowns**  
In many situations, it’s useful for drop-down fields to be related to each other. For example, for a form requesting maintenance in an office, there may be a drop-down list to select which floor the office is on and another drop-down to select the room number. A cascading drop-down would allow you to configure the form so that only the relevant room numbers are loaded in the second drop-down once the floor is selected in the first drop-down.

*Figure 2: Configure cascading dropdown lists.*

Not only is this a useful capability in general, but specifically, it makes it easier to configure Citizen Services for use cases like building maintenance.

Export Service Request Data to CSV

Chat messages:

- Vanessa Molnar 11/1/17 12:16 PM: Well done Paul Olenick on the animated GIFs!!
- Vanessa ... 11/1/17 1:19 PM: Looping in Mary Zubritsky to review/edit this CS 1.3.1 product release blog
- Vanessa Molnar 11/3/17 2:34 PM: Looping you lovely ladies in re: the animated GIF's that need to be added to Paul's CS 1.3.1 product update blog
- Evelyn Zh... 11/7/17 5:00 AM: Hello Vanessa , Here comes the blog: <https://www.avepoint.com/product/avepoint-blog/citizen-services-1-3-1/>
- Vanessa Molnar 11/7/17 7:40 AM: Fantastic; thanks Evelyn!!



# 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...

- AUTOMATICALLY 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



# 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

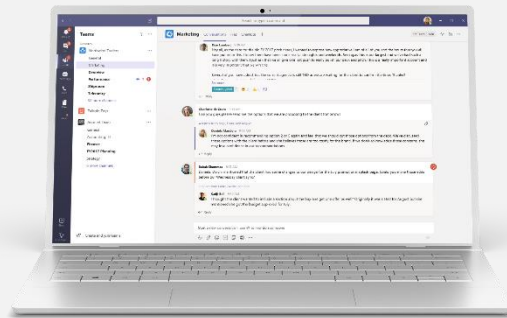
## Modern collab with Teams

- 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

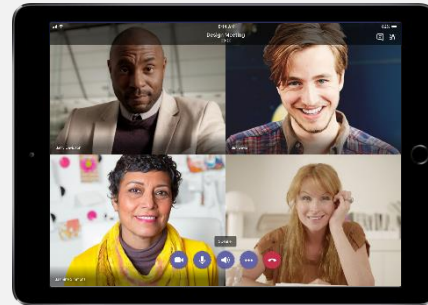


# Three ways to access your Teams

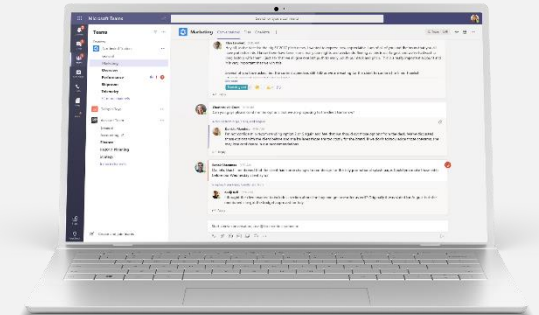
Desktop



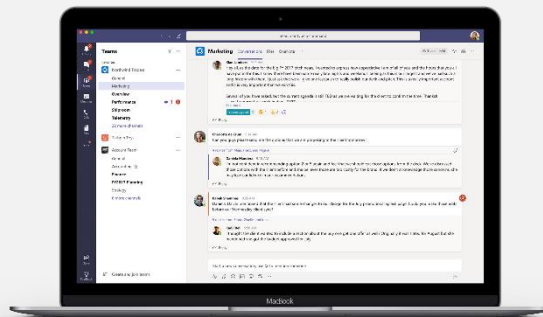
Mobile



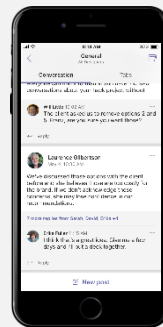
Browsers



iPad



iPhone



Android



Edge



Chrome



Firefox



How can we improve everyday experiences with Microsoft Teams?



# Customize & extend Microsoft Teams



Organizational  
tools & services



3<sup>rd</sup> party  
applications



Office 365  
applications



Departmental  
tools



Employee  
resources



Support  
& info



Polly.ai



Trello



Gi



Jira Core



Confluence



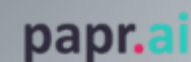
Microsoft Teams



make your apps work for **you**



Unlock productivity with  
**150+** integrations



# Microsoft Teams Extensibility



## Channel Tabs

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



## Connectors

- Simple webhook notifications in channels



## 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 channels

- Coordinate tasks in a team environment
- Broadly share information



## Bots in 1:1 chat

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

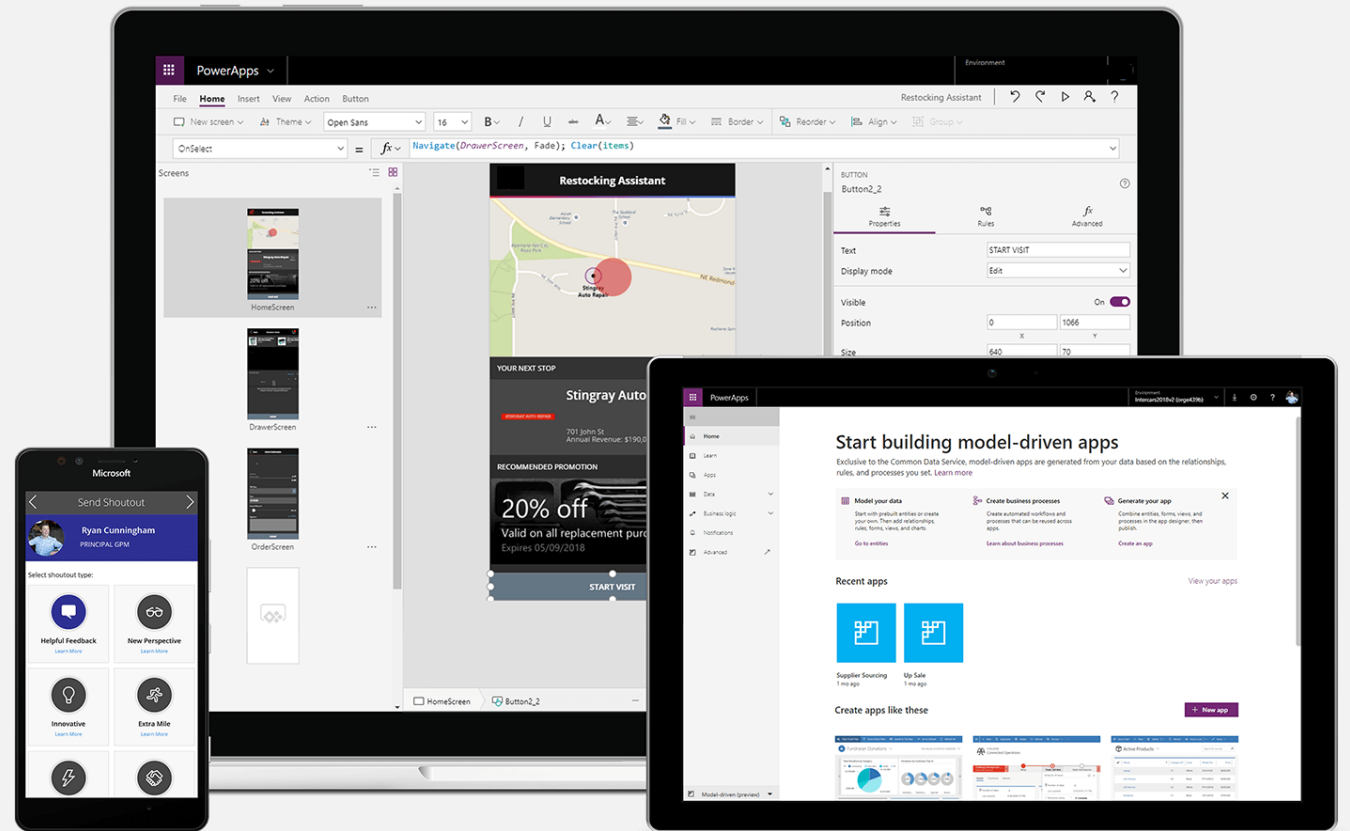


Government Community  
Cloud Coming Soon




# 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




# Every day I have to ... eat

 **Café and Dining Dev**

[Conversation](#) [Favorites](#) [Reminders](#) [About](#)

Yesterday 1:49 PM

Where is the nearest café?

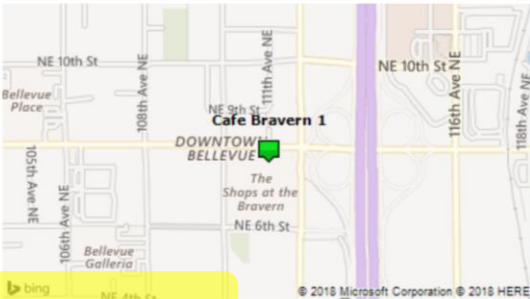
 Café and Dining Dev Yesterday 1:49 PM

You need to sign in before you can use Café Bot.

[Sign in](#)

Here's all the cafés. Please select a café to get menu details.


Cafés near you



NE 10th St  
Bellevue Place  
105th Ave NE  
106th Ave NE  
108th Ave NE  
NE 9th St  
111th Ave NE  
NE 10th St  
116th Ave NE  
118th Ave NE  
DOWNTOWN BELLEVUE  
The Shops at the Bravern  
NE 6th St  
Bellevue Galleria

bing







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 Café Bravern 1  
Building BRAVERN-1

Here's the menu for Café Bravern 1 on Wednesday

What can I do?

Type your questions here






# Every day I have to ... eat

Café and Dining Dev

Conversation Favorites Reminders About

Here's the menu for Cafe Bravern 1 on Wednesday



**Cafe Bravern 1**  
Breakfast 7:00 - 10:30 am | Lunch 11:00 - 2:00 pm | Espresso 7:00 - 4:30 pm

**THE WOK**  
Fried Rice, Spicy Fried Chicken Wing, Mongolian Tofu, General Tso Chicken

**SUB SHOPPE**  
Build Your Own Sub

**SOUPS**  
Vegetarian Southwest Vegetable (vegan), Old Fashion Tomato (vegan), Chicken Noodle w/ Penne Pasta

**SALAD BAR**  
Salad Bar

What can I do?

Take a tour

Learn about what I can do

Where is the nearest café?

Get cafés nearest to your assigned building

What is on menu for Friday?

Get menu of any week day for your building's ...

Today's menu at Lincoln Square

Get today's menu for a cafe

What cafés are serving sushi

See what cafés are serving sushi







Remind me when sushi available


Get reminders for when a food item is on the ...

Meal card balance

See your meal card balance and add money

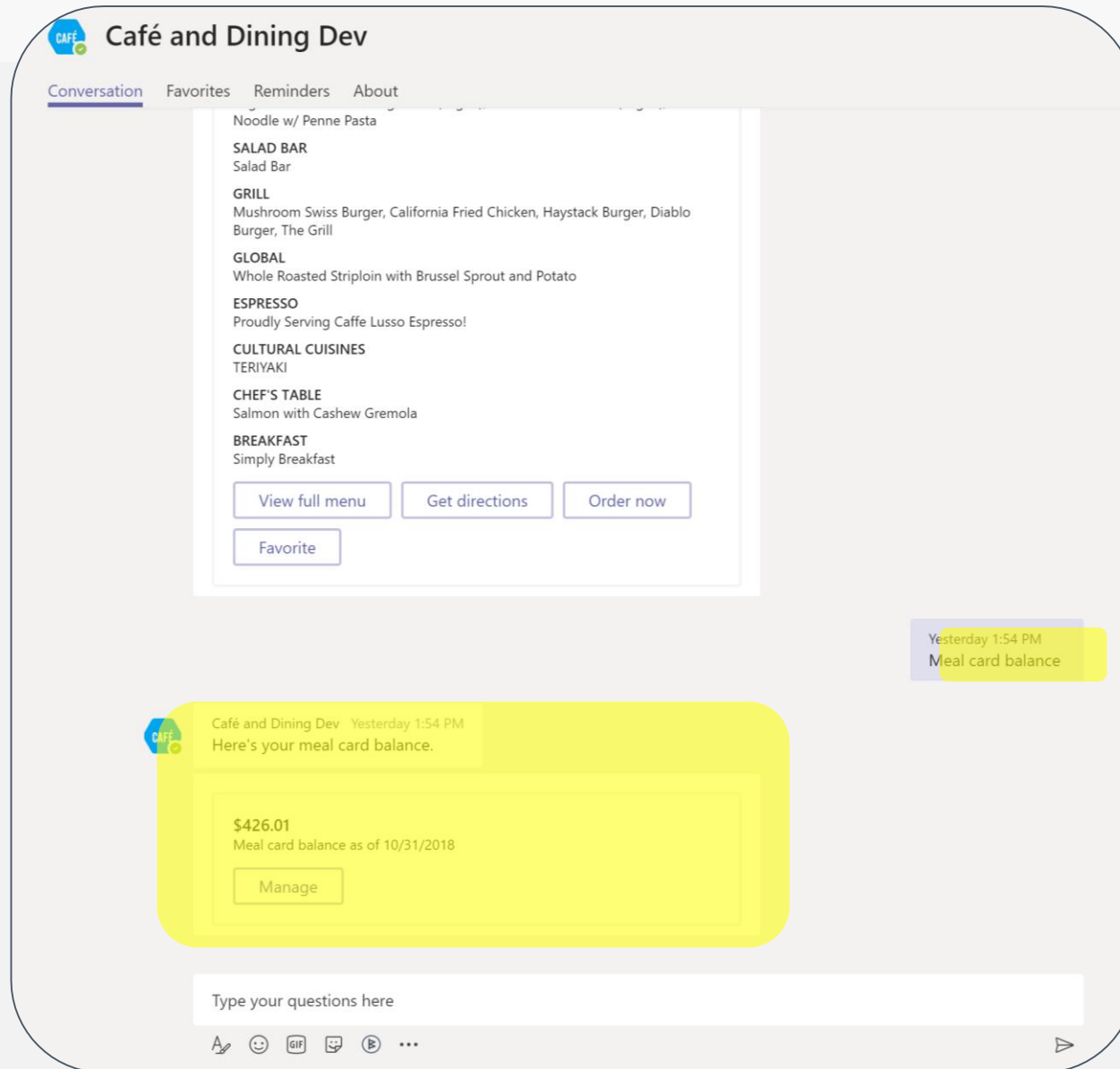
Type your questions here







# Every day I have to ... eat



# 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.

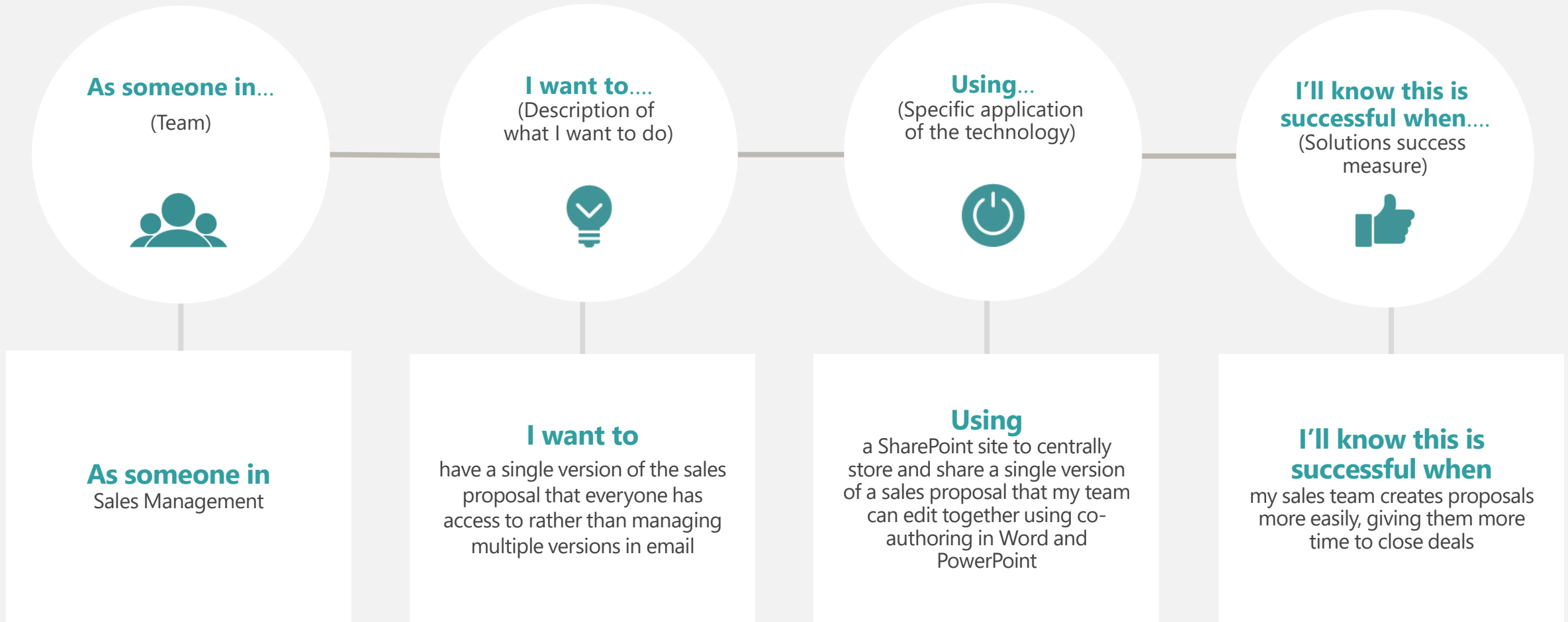


Get guidance on these and other scenarios in the [FastTrack Productivity Library](#)




# Not sure how to begin?

To help identify business scenarios, consider using the framework below



# Examples: A Day in the Life



## Leadership Connection Week in the life of an employee

**Monday**

**9:00 AM**  
Start the week by scanning the "Leadership Connection" group in the Yammer network. Get to know key initiatives, challenges, and opportunities across the organization. Like a few posts that resonate.

**11:00 AM**  
Respond to a question posted by the CEO on opportunities to increase customer satisfaction. Provide example of an initiative that worked at a local subsidiary.

**Tuesday**

**8:00 PM**  
Post a question on Yammer regarding a new HR policy for extended maternity leave and ask leadership's thoughts on including new fathers.

**Wednesday**

**10:00 AM**  
Learn about key takeaways from leadership meeting and direction for the company. Provide feedback on positive and negative impact of similar initiatives in the past.

**2:00 PM**  
Search "Leadership Connection" group in the Yammer networks to locate where employees are volunteering to help with various hurricane relief efforts. Look up #dayofservice and use this information for a presentation about positive impact employees can have on society.

**Thursday**

**1:30 PM**  
Participate on a live broadcast of the employee townhall on Yammer. Ask questions on live Yammer feed and participate in the discussion.

**4:00 PM**  
Respond to employee townhall poll on Yammer. Ask questions on the new operating model. Share to "Operation Quality Champs" Yammer group.

**Friday**

**5:00 PM**  
Accept invitation to join the virtual team of employees focused on the customer satisfaction initiative.



## Day in the life – Healthcare

Meet Dr. Thomas, an Oncologist at Contoso Health who uses Microsoft Teams to closely collaborate with his medical team to deliver better and more personalized care for his patients.

**7:45 AM**  
While commuting to work, Thomas gets a notification on his Teams mobile app. A nurse has posted a message on Contoso's "Oncology Department" Teams "General" channel, asking him to review their patient's x-ray results.

**8:30 AM**  
In his office, Dr. Thomas navigates to his patient's x-ray file and uses the "Start Conversation" feature and @ mentions the Radiologist requesting additional data about the results.

**9:30 AM**  
Reviews his patient's channel for updates and conversations. Confirms his 11:30 AM meeting with his team and @ mentions a nurse to call his patient and let her know they'll have x-ray results later in the day.

**11:30 AM**  
Joins the meeting on Teams to discuss patient updates with his Radiologist and Nurse.

**12:30 PM**  
After his meeting, Dr. Thomas gets additional information from the Power BI dashboard and post-meeting conversations in Teams. He messages his Radiologist with questions and to confirm results.


**2:00 PM**  
He responds to an @ mentioned conversation via Teams agreeing with his medical team's assessment on his patient. Follows up with a call to his patient to report that her x-rays came back negative.

**3:00 PM**  
Dr. Thomas' team meet to get the most up-to-date status on all the patients under their care. He shares concerns about current wait times and identifies any quality of care issues using the Power BI dashboard to visualize trends. The team organizes their ideas and plans for next steps using the Planner tab on their "Oncology Department" Teams site.

**5:00 PM**  
Before his shift is complete, he assigns new tasks on any outstanding concerns for his patients to his colleagues for the upcoming shift through @ mentions in the conversation tab.

Get Started with Teams today!





## Day in the life – IT Project Manager

Jamal is an IT project manager with Contoso Technologies and is responsible for making sure IT projects are meeting stakeholders needs, and delivered on time and within budget.

**7:45 AM**  
Jamal uses his Teams mobile app to get up to speed the activity feed as he travels to work and joins the daily stand up call remotely.

**8:30 AM**  
At the office, he navigates to the Visual Studio Online dashboard tab in Teams. Jamal reviews his projects and notes a few trends that are concerning.

**9:30 AM**  
On Teams he asks for additional data points related to projects risks and @ mentions specific individuals to get their attention.

**11:30 AM**  
Jamal joins a project review meeting in Teams, shares his screen, and navigates to the Planner tab to review key activities by owner and adjusts due dates.


**2:00 PM**  
He prepares his meeting notes and replays the Teams cloud based meeting recording for things that he may have missed. He @mentions the channel with updates and action items in Planner.

**3:30 PM**  
Jamal gets notified in Teams of a new bug that was posted in the channel from the Visual Studio Online connector. He @ mentions experts to help to resolve in time for their release date.

**4:30 PM**  
In Teams he goes to the Financial app tab to update current resource costs for several of his projects.

**6:00 PM**  
Jamal receives another notification from Visual Studio Online notifying him that the bug is being resolved. He prepares for his weekly status report and posts it into the PMO Teams site @mentioning the team.

Get started with Teams today!







# 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

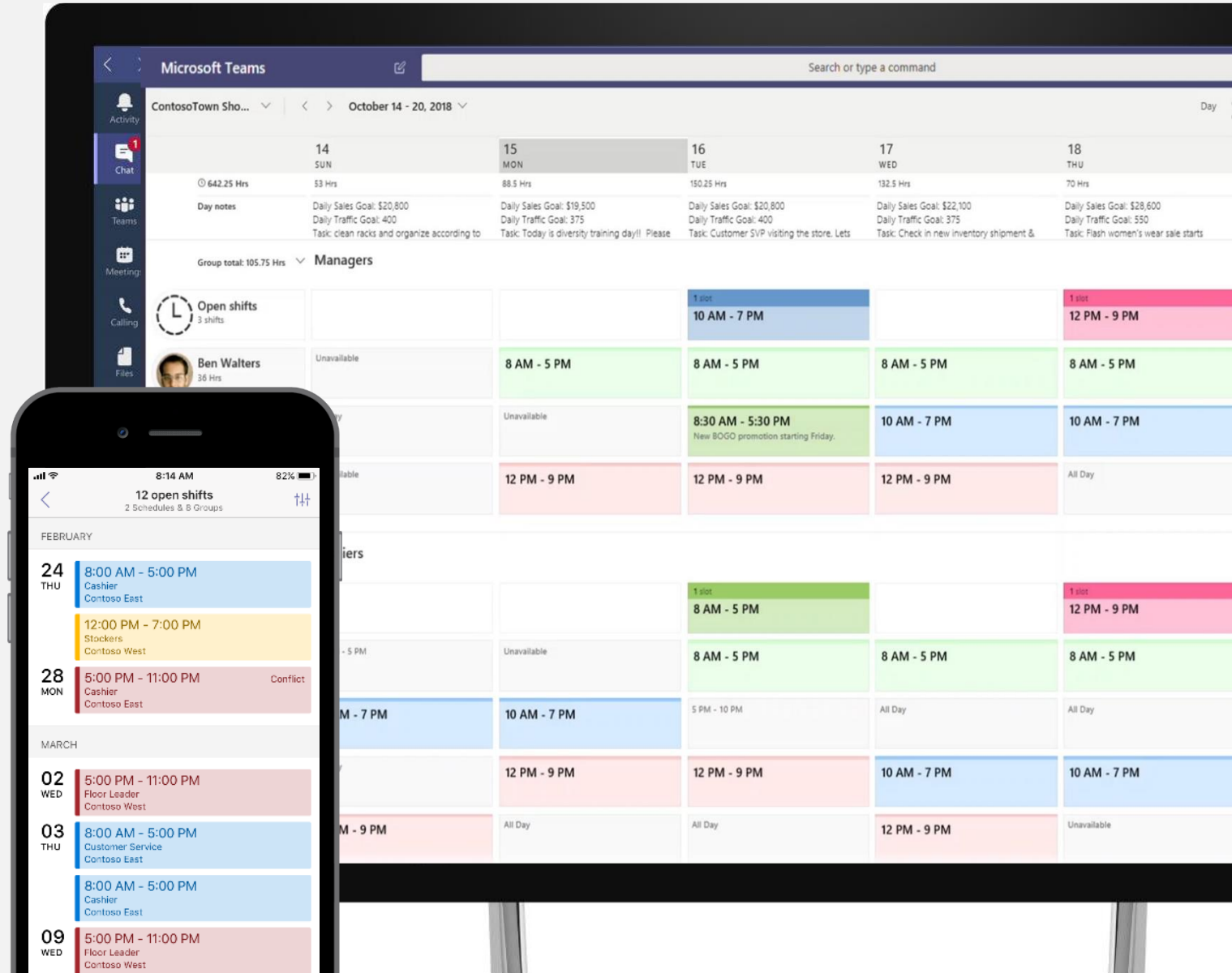
## Empower Firstline Workers with tools to succeed

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 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.





# 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

**Gartner.**  
WHY GARTNER ANALYSTS RESEARCH EVENTS CONSULTING ABOUT

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Search

## Why Microsoft Teams Will Soon Be Just as Common as Outlook

[f](#)[t](#)[in](#)[G+](#)[e](#)

**Published:** 18 June 2018    **ID:** G00348503

**Analyst(s):** Larry Cannell | Mark Cortner

### Summary

Microsoft Teams is playing an increasingly unifying and expanding role in Office 365. This report guides technical professionals on getting the most value out of Teams, analyzes Teams' impact on the rest of Office 365, and assesses Teams' strengths and weaknesses.

### Table of Contents

Analysis

- Microsoft Teams From an End-User Perspective
  - Channels Are the Heart of Group Collaboration in Microsoft Teams
  - Peer-to-Peer Chat Provides Simple Messaging and Sharing
  - Teams Also Provides Personal Productivity Features
- How Teams Impacts Other Office 365 Products and Services
  - Membership: Teams and Office 365 Groups
  - Messaging: Teams, Yammer, Skype for Business and Outlook
  - Content Collaboration: Teams, Office 365 ProPlus, OneDrive for Business and SharePoint

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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>



# 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



# What Do I Need to Govern?



For collaborative workspaces, customers want to govern:

How are Teams  
requested, approved  
and created

*Provisioning*

How are availability,  
compliance and  
changes over time are  
managed

*Management*

How do I  
retain/expire/dispose of  
Teams as appropriate

*Lifecycle*



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



# 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

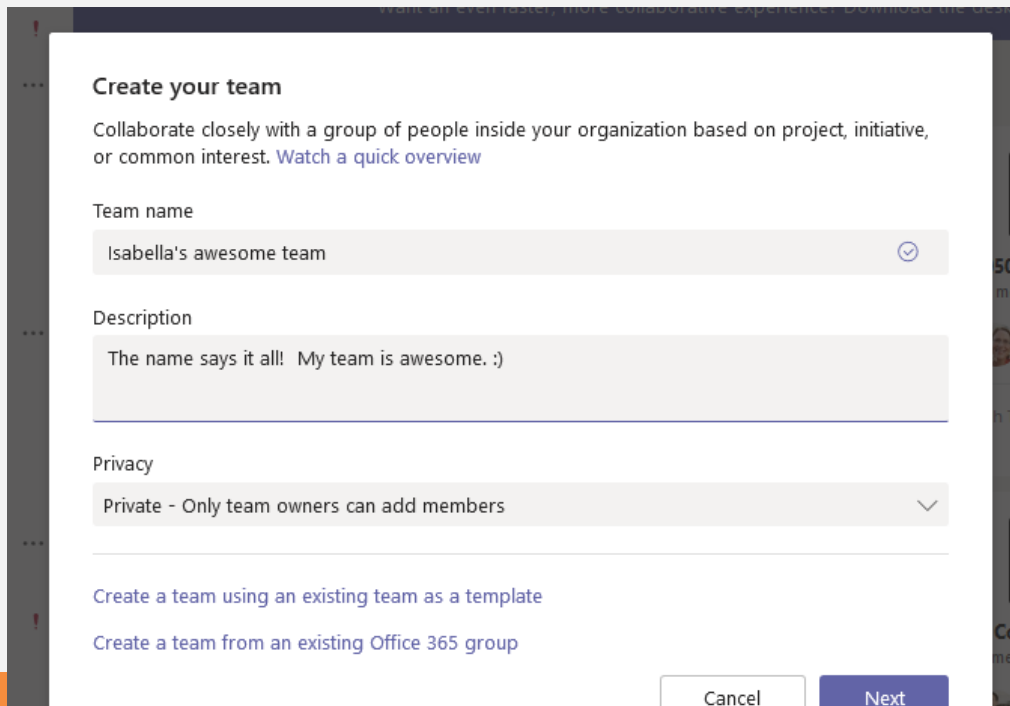
<https://blogs.office.com/en-us/2017/04/06/whats-new-in-office-365-groups-for-april-2017>



# 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



**Create your team**

Collaborate closely with a group of people inside your organization based on project, initiative, or common interest. [Watch a quick overview](#)

Team name

Isabella's awesome team

Description

The name says it all! My team is awesome. :)

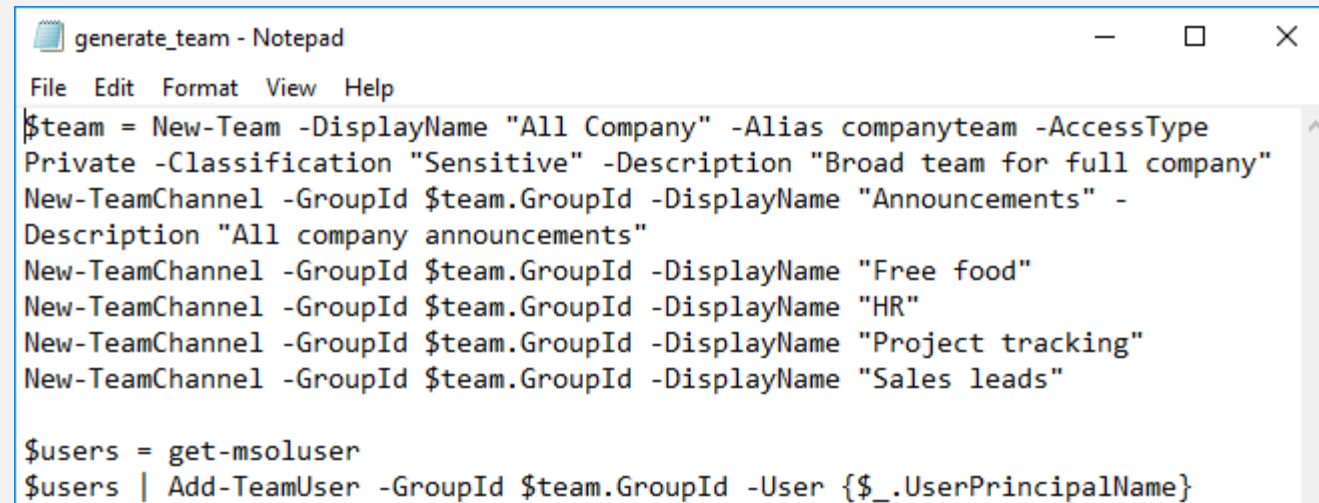
Privacy

Private - Only team owners can add members

[Create a team using an existing team as a template](#)

[Create a team from an existing Office 365 group](#)

Cancel Next



```
File Edit Format View Help
$team = New-Team -DisplayName "All Company" -Alias companyteam -AccessType
Private -Classification "Sensitive" -Description "Broad team for full company"
New-TeamChannel -GroupId $team.GroupId -DisplayName "Announcements" -
Description "All company announcements"
New-TeamChannel -GroupId $team.GroupId -DisplayName "Free food"
New-TeamChannel -GroupId $team.GroupId -DisplayName "HR"
New-TeamChannel -GroupId $team.GroupId -DisplayName "Project tracking"
New-TeamChannel -GroupId $team.GroupId -DisplayName "Sales leads"

$users = get-msoluser
$users | Add-TeamUser -GroupId $team.GroupId -User {$_.UserPrincipalName}
```

# 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 templated team creation via API



# 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



# Classification and Privacy...

Search or type a command

Activity

Chat

Teams

Meetings

Files

Join or create a team

Help

Richland Hammer Time > General ...

Private Toxic

Conversations Files Task Plan +

Add more people Create more channels Open

MOD Administrator 10/24 12:26 PM  
Tab conversation has begun.

Task Plan

MOD Administrator 10/24 12:26 PM  
Hey @Adele Hello

MOD Administrator 10/24 12:28 PM  
This doc needs attention  
Hey @Adele..

Project tracker1.ods

Start a new conversation. Type @ to mention someone.





# Private or Public- What's the impact?

Microsoft Teams

Search or type a command

Join or create a team

### Create your team

Collaborate closely with a group of people inside your organization based on project, initiative, or common interest. [Watch a quick overview](#)

[See your organization's guidelines.](#)

Team name

Description

Privacy

- Private - Only team owners can add members
- Private - Only team owners can add members
- Public - Anyone in your organization can join
- Org-wide - Everyone in your organization will be automatically added

Cancel Next



# Understanding "Public" content visibility

The screenshot displays the Microsoft Teams interface. On the left, the navigation pane shows the 'Contoso News' channel selected under the 'General' tab. The main area shows the 'Contoso News' channel page with a 'Public' visibility status highlighted by a red box. Below this, the 'People and Groups' section shows the 'Contoso News Members' group. A red arrow points from the 'Public' box to the 'Contoso News' group in the 'People and Groups' section.

Search or type a command

Contoso News > General ...

Public

Conversations Files Wiki GAO +

Here are some things to get going...

Office 365

People and Groups > Contoso News Members

Groups

- Contoso News Members
- Contoso News Visitors
- Contoso News Owners
- More...

View: Detail View

Name	About me	Title	Department
<input type="checkbox"/> Contoso News			
<input type="checkbox"/> Everyone except external users			

# Group "Classification"

**Microsoft Teams** Search or type a command

Join or create a team

### Create your team

Collaborate closely with a group of people inside your organization based on project, initiative, or common interest. [Watch a quick overview](#)

[See your organization's guidelines.](#)

Team name

Description

Privacy

Private - Only team owners can add members

**Classification**

Pretty Safe

Classification allows organization to protect data based on our policies and standards.

Pretty Safe - You know like iffy but still safe

WickedlyPrivate - Probably don't show anyone

Toxic - Don't you DARE!

[Create a team using an existing team as a template](#)

[Create a team from an existing Office 365 group](#)

Cancel Next



# 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



# Classifying SharePoint sites and Groups- Soon

Office 365

SharePoint

Search in SharePoint

Following

MIPIgniteDemoSite

Featured links

Edit

No featured links yet

As an admin, you can add links that are useful for everyone in your organization.

Frequent

IgniteDemoSite

There's no recent

Create site

Get a team site connected to Office 365 Groups

Use this design to collaborate with your team. Share documents, track events in a shared calendar, and manage project tasks.

Office 365

SharePoint

Site name

Contoso Merges and Acquisition

The site name is available.

Group email address

ContosoMergesandAcquisition

The group alias is available.

Site address

https://mippreviewtenant26.sharepoint.com/sites/ContosoMergesan...

Site description

Tell people the purpose of this site

Sensitivity ⓘ

Confidential

Privacy settings

Private - only members can access this site

Next

Cancel



# Classifying SharePoint sites and Groups

Office 365

SharePoint

MA

Your organization doesn't allow you to download, print, or sync using this device. To use these actions, use a device that's joined to a domain or marked compliant by Intune. For help, contact your IT department. [More info.](#)

CM

Contoso Merges and Acquisition

Private group | Confidential

Microsoft Admin

1 member

Search this site

Home

Conversations

Documents

Notebook

Pages

Site contents

Recycle bin

Edit

+ New

News

+ Add

Keep your team updated with News on your team site

From the new team site home page you'll be able to quic...

Add News

Activity

Quick links

Learn about a team site

Learn how to add a page

Documents

See all

+ New

Upload

...

All Documents



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 -Property "Group.Unified" -EQ).id -DirectorySetting $Setting
```

**Create your team**

Collaborate closely with a group of people inside your organization based on project, initiative, or common interest. [Here's a helpful video](#)

❗ The name can't contain HR.

Team name

HR

GRP HR Sales & Marketing ⓘ

Description

Privacy

Private - Only team owners can add members

## 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”





Other Options for  
*Naming Policies?*

# Using the native “Dynamic Membership” for Teams and Groups...

The screenshot shows the Azure Active Directory admin center interface. On the left, the 'Group' configuration pane is visible with the following settings:

- Group type: Office 365
- Group name: My Cool Dynamic Group
- Group description: Enter a description for the group
- Membership type: Dynamic User
- Dynamic user members: Add dynamic query

The main pane shows the 'Dynamic membership rules' configuration. It includes a section to 'Add dynamic membership rule' with buttons for 'Simple rule' and 'Advanced rule'. Below this, the 'Add users where' section is configured with the following values:

- department
- Equals
- Cool People

## Based on AAD Attributes

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

## Requires *clean* AAD

- AAD properties must be current and complete

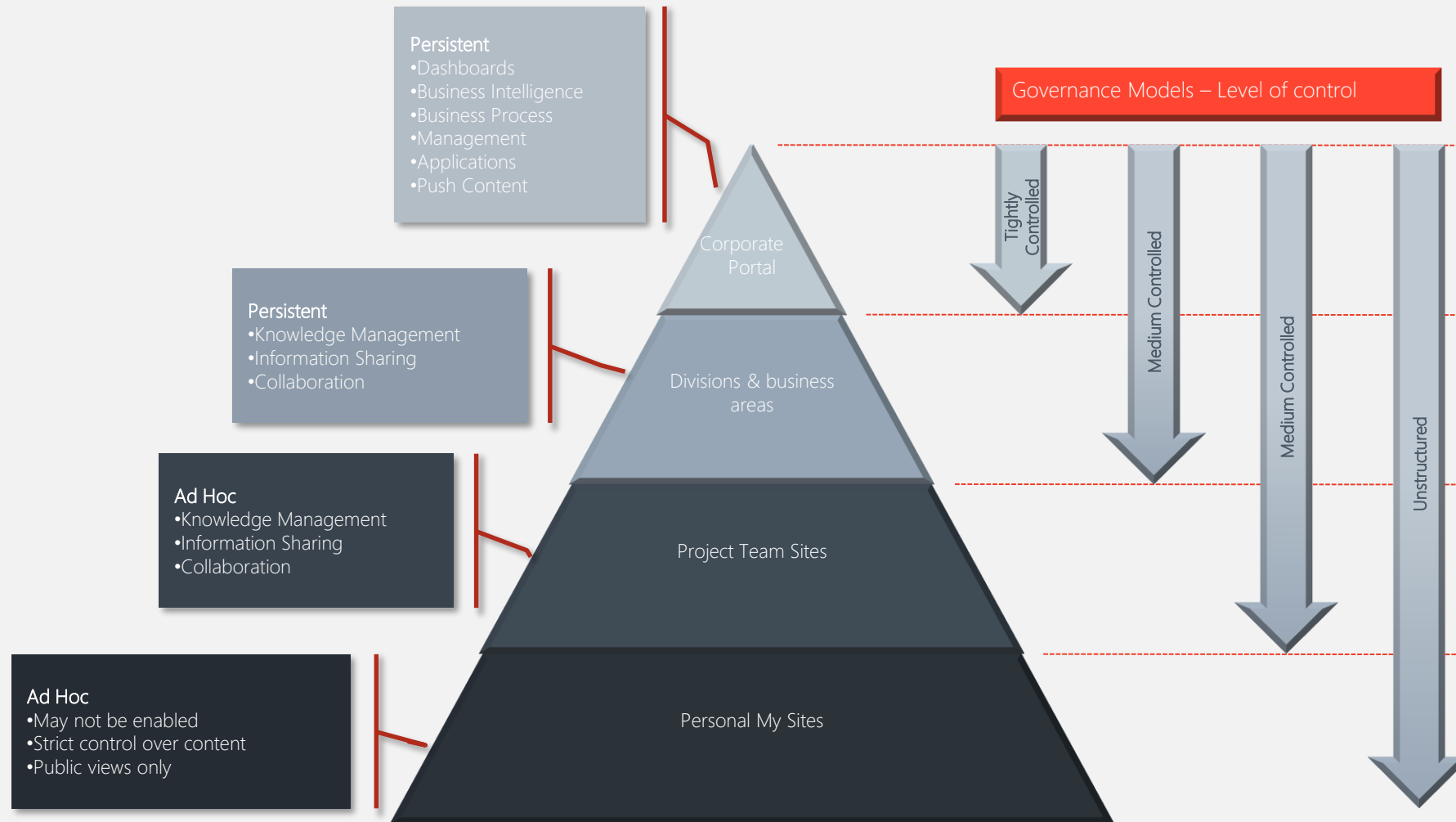
This dialog box shows the 'Advanced rule' configuration. It includes a section to 'Add dynamic membership rule' with buttons for 'Simple rule' and 'Advanced rule'. Below this, the 'Advanced rule' section is configured with the following value:

- (user.department -eq "Cool People")





# Different Strategies for Different Information



**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**

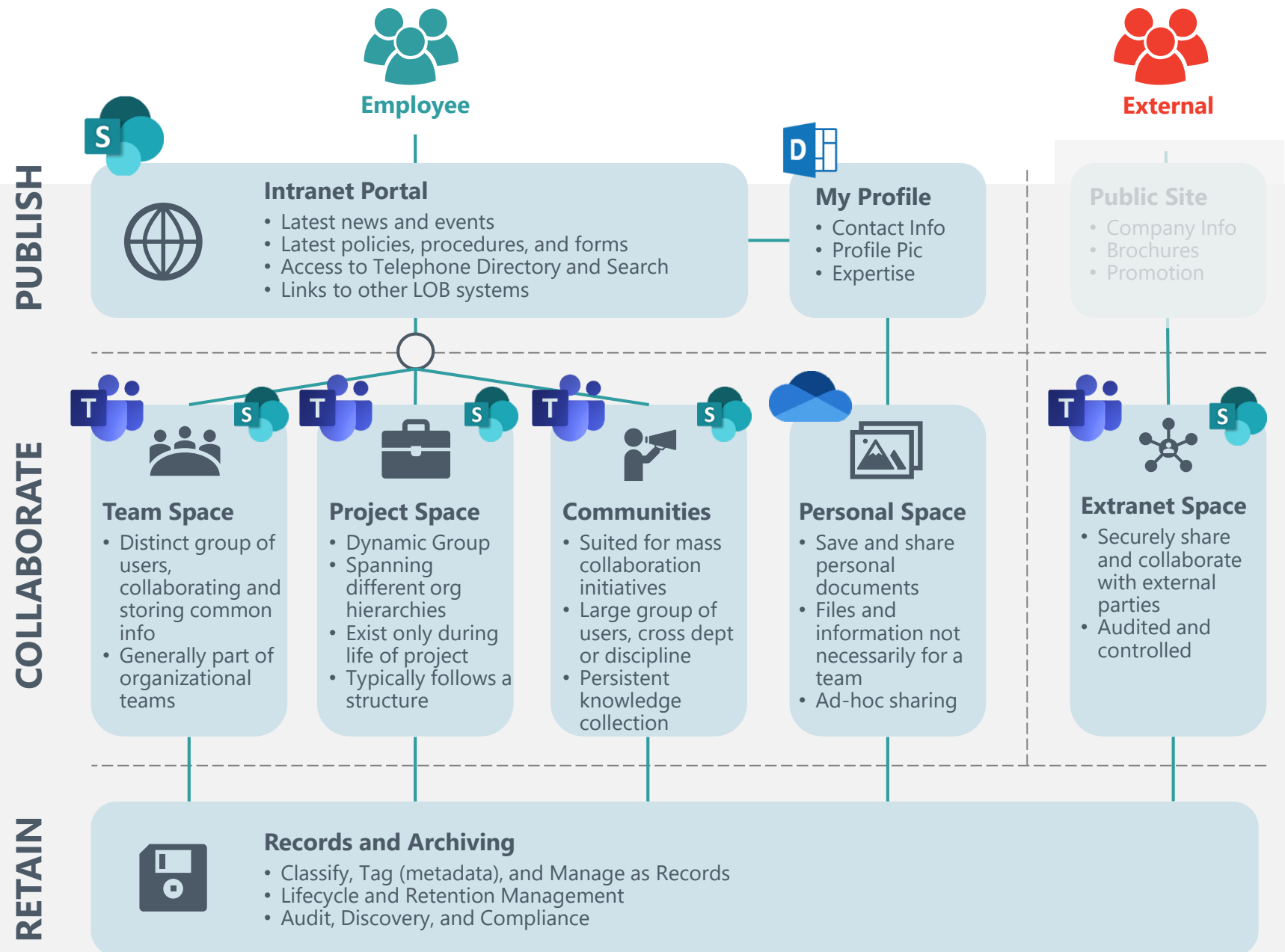
after  
**12 Months**






# 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.*







### 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

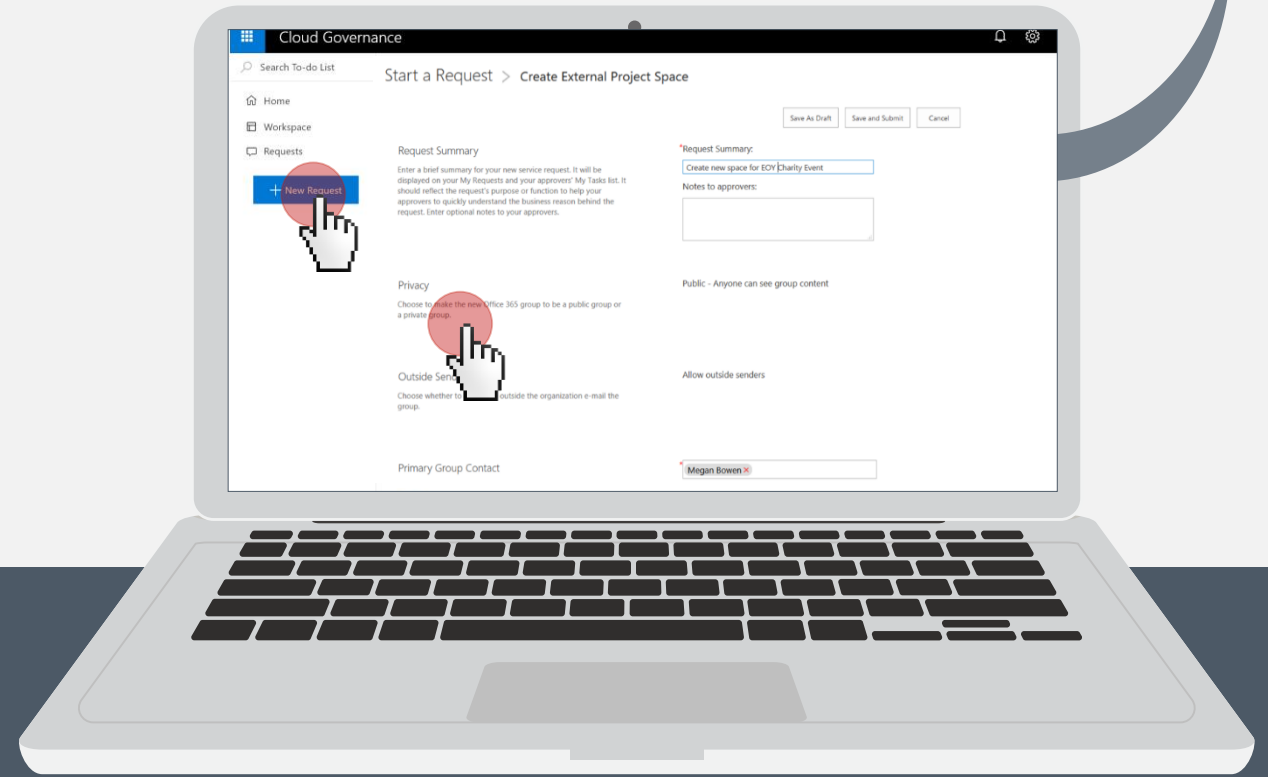
**Backup:** All  
**External Users:** Yes  
**Recert:** 6 Months  
**Reporting:** Annual  
 +  
**Default Labels**  
**Metadata Presets**



### EOY Charity Event

- External Sharing: On
- Recertification / Reporting: On
- URL: /sites/PROJ\_EOYCharityEvent

LABELLED  
TAGGED



# Bringing It Together

# Example: Request and Track Workspaces

The screenshot shows the Microsoft Teams 'MyHub' interface. The top navigation bar includes 'Conversation', 'Home', 'Start a request', 'Workspaces', 'Requests', and 'About'. The 'Start a request' tab is active, showing a 'New request > New Microsoft Team' page. The page has three steps: 'Step 1. Request information', 'Step 2. Basic settings', and 'Step 3. Advanced settings'. Under 'Step 1', there is a 'Request summary \*' field with the text 'I need a new Team created for the DTA conference', a 'Notes to approvers' field, and a 'Team template' section. The 'Team template' section has two radio buttons: 'Create a team from scratch' and 'Create a team from an existing team'. The 'Create a team from an existing team' option is selected. Below it is a dropdown menu with 'Select one' at the top and a list of options: 'Conference Planning Team', 'Human Resources', 'Sales', and 'Training'. The left sidebar shows various icons for navigation, including 'MyHub', 'Ask', 'Activity', 'Chat', 'Teams', 'Calendar', 'Files', 'Apps', and 'Help'.

- 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**.



# 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





# 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 <b>time for change</b>	Show how Microsoft 365 adds value and helps them save time
<b>Microsoft 365 perceived as an insecure platform</b> 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 <b>not be enough support</b>	Include details on how the support services will operate and supporting content/guides
People are worried there will <b>not be sufficient training</b> 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 <b>'get ready'</b>	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.
<b>Senior managers potentially instructing people not to use new options</b>	Supervisor and Manager 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
<b>Open collaboration is a new concept</b> 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.
<b>People tend to take steps only when '100% ready'</b> 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 <b>don't like change, they don't want to change. Period.</b>	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

*(Insert Ideas)*

## Resistance Management Plans/Ideas

*(Insert Ideas)*

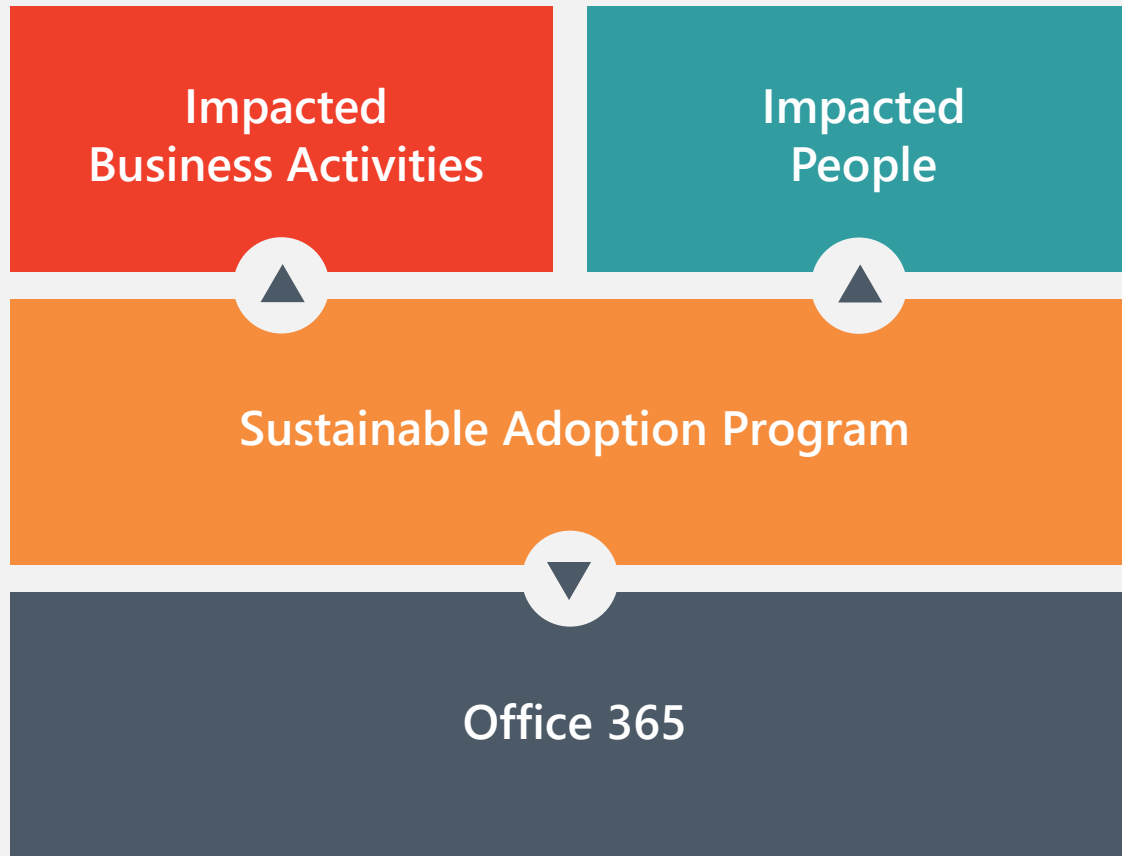


# Adoption challenges

- 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.



# Why Training Alone is Not Working



Non-Contextual

Unclear Roles

Generational Gap

What's In It For Me?





# Step 1: Engage Key Stakeholders

Business leadership

Champions

Early Adopters

IT Support





# Gain Business Leadership Buy-In

Executive  
Leadership



Divisional  
Heads



# 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.

A photograph of three diverse office workers in a meeting. In the foreground, a Black woman with short curly hair is smiling and looking towards the right. Behind her, an Asian man is also smiling and looking in the same direction. In the background, a man with a beard is looking down at a smartphone he is holding, with a pen in his other hand. They appear to be in a modern office setting with large windows in the background.

## 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



# Step 2: Establish Use Cases

A group of people in a meeting. In the foreground, a woman with brown hair is looking down at a laptop. Next to her, a man is drinking from a cup. In the background, another man is standing and speaking. The setting appears to be a modern office or library with bookshelves.

Identify specific use cases

Prioritize scenarios

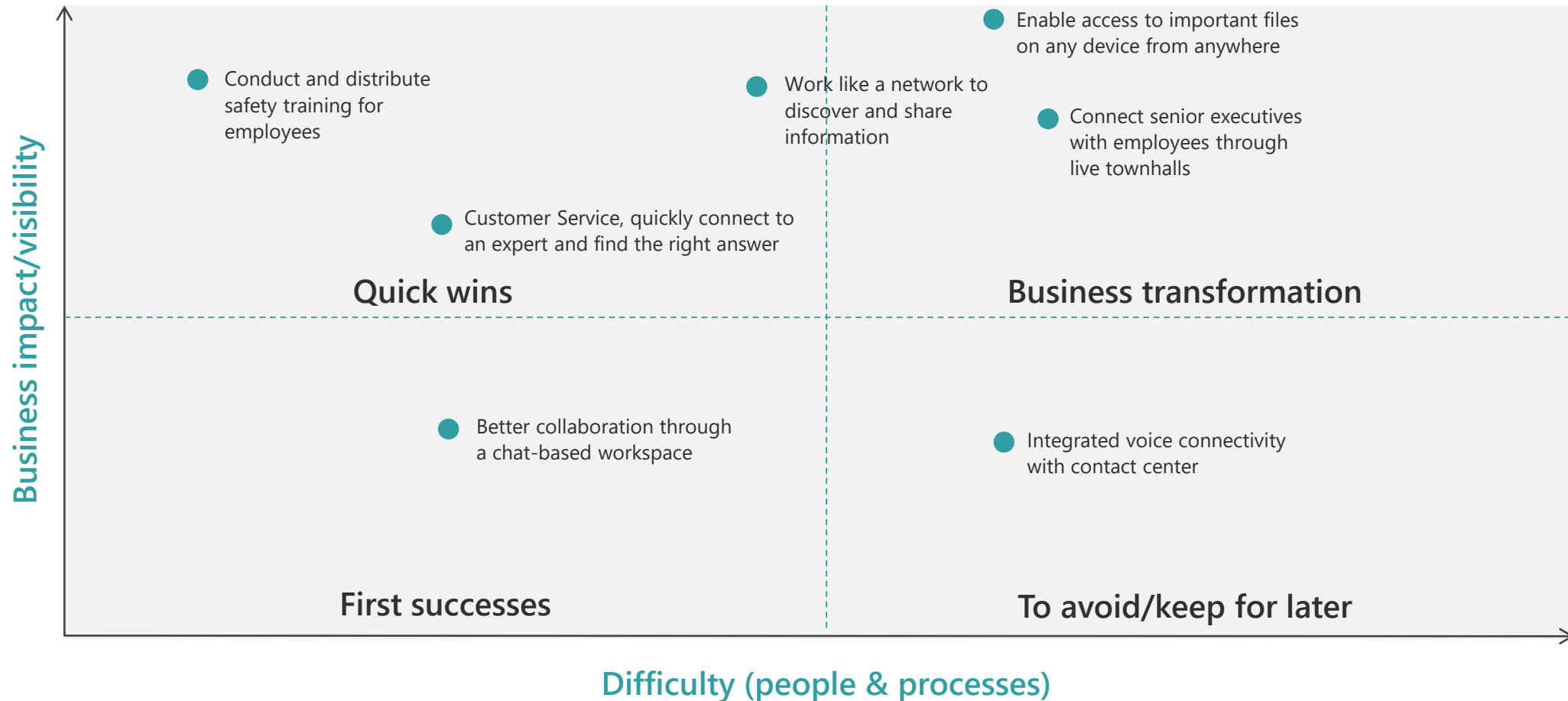
Communicate value



# Example: Identify Business Use Case



# 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



# 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?

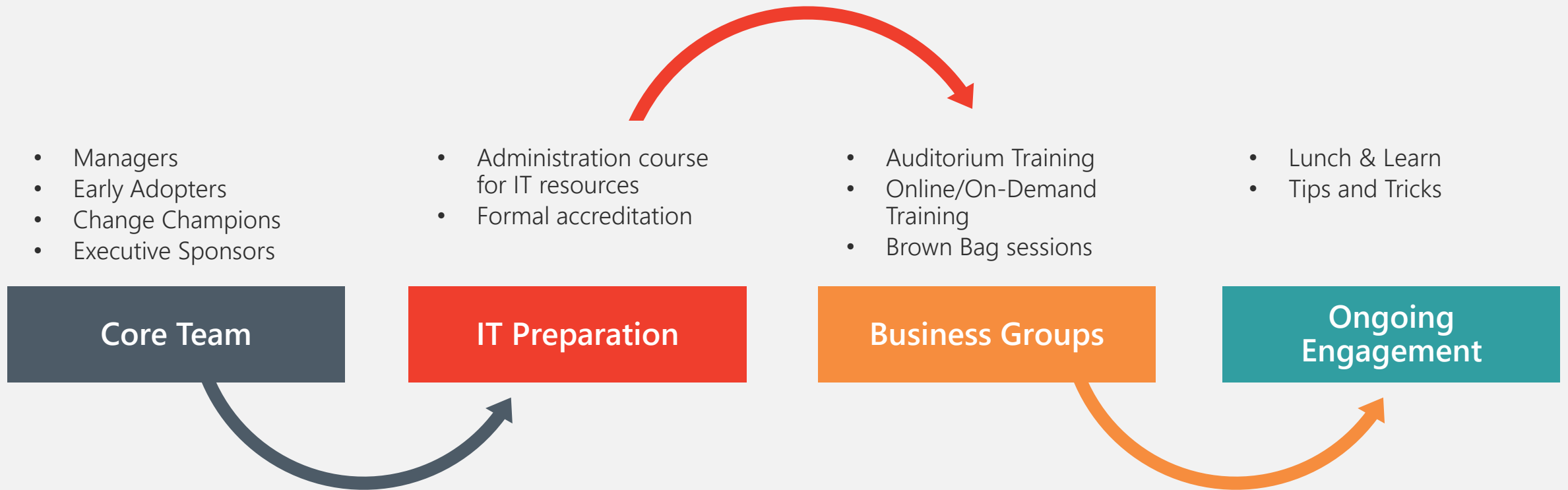


# Build capability through **varying methods**





# Align training strategy throughout phases



# 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



# 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.



# “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.*



# Microsoft 365 learning pathways

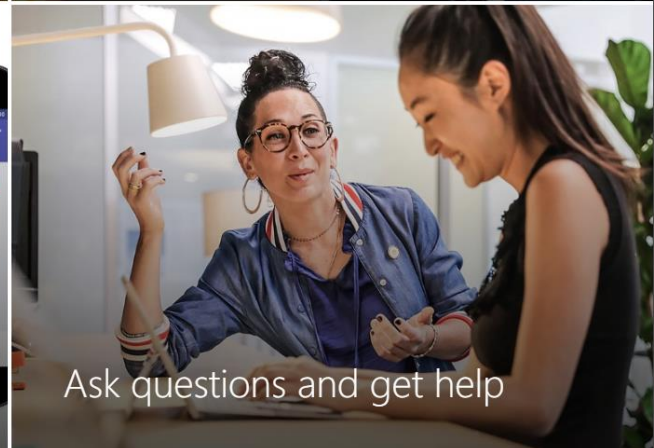
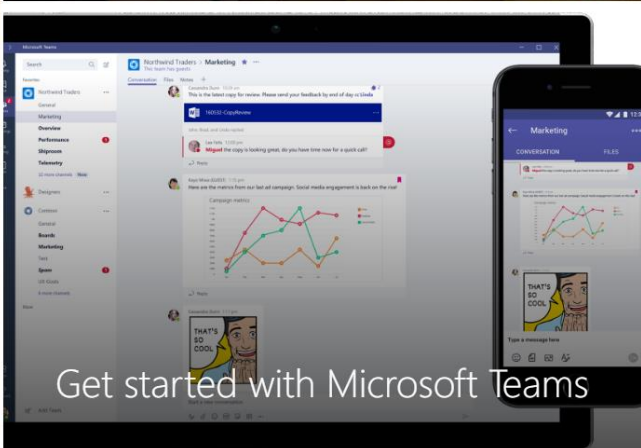
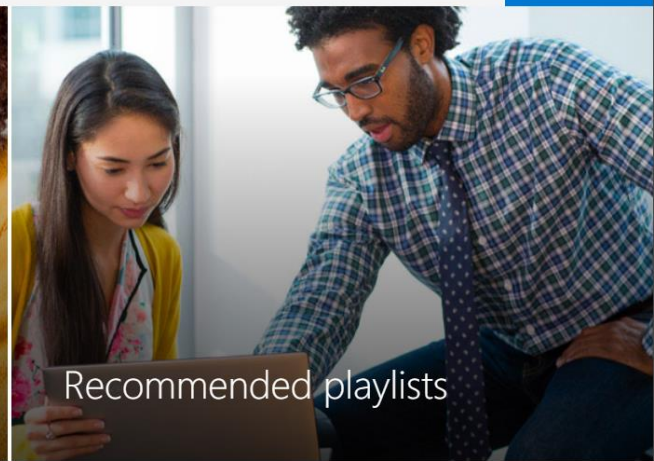
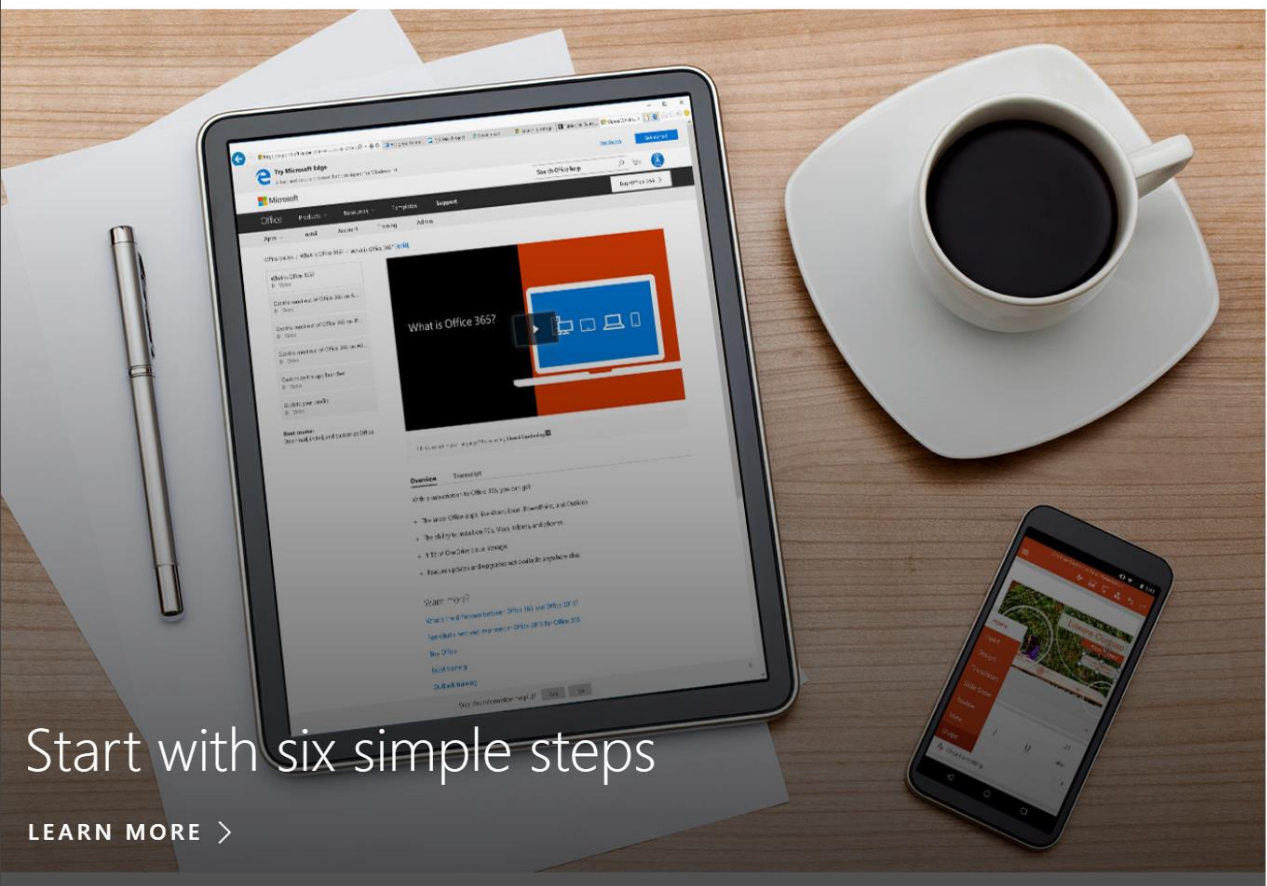
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<https://docs.microsoft.com/en-us/office365/customlearning/>





# Step 4: Communicate & Drive Awareness

A high-angle photograph of a woman with blonde hair wearing a red and brown sweater, and a man with glasses wearing a light blue shirt. They are standing over a table covered with a large sheet of paper. On the table is a tablet displaying the Windows 8 Start screen, a yellow smartphone, and some small yellow and red packets. The man is gesturing with his hands as they look at the tablet.

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



# 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



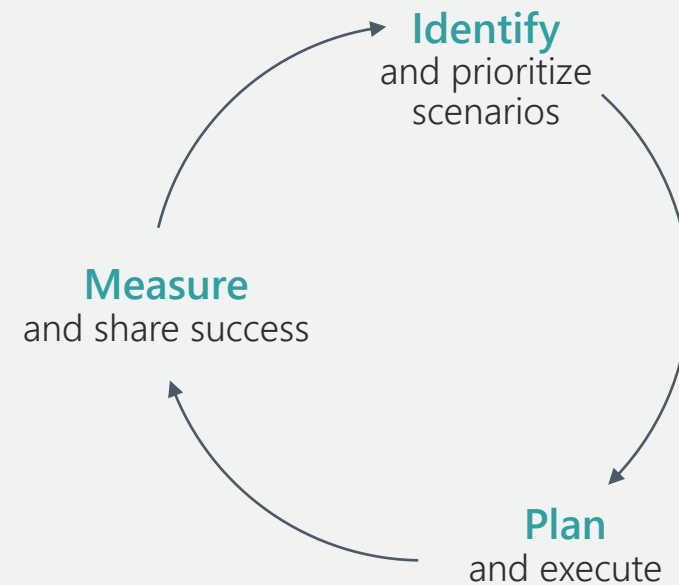
# Communicate value to stakeholders with scenarios

## 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

## Report and build on wins





# 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.



# 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





## 5

[illegible]

## [Customer Name]

### Pilot Success Criteria Status

## Overall Status

#	Metric	Measurement	Goal	Actual	Trend	Status
1	Acceptable Lync Call Quality	Percentage of poor quality calls	< 20%	19%	↑	↑
2	Conferencing User Adoption	Users who have organized at least one conference	85%	74%	↑	↑
		Total amount of Lync hosted audio conferencing minutes	X # of minutes			
		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 alerts	X	Y	↔	↔
		Session success rates	P2P Audio: 93%	P2P Audio: 95%	↔	↔
			P2P App Sharing: 95%	P2P App Sharing: 96%	↔	↔
			Conf App Share: 95%	Conf App Share: 96%	↔	↔
			Conf AV: 90%	Conf AV: 95%	↔	↔
			Conf Join: 95%	Conf Join: 96%	↔	↔
6	User Communications and Training	User survey satisfaction score	X	Y	↑	↑
7	Lync Meets SLAs	Comparison to production SLAs	Recovery: X Availability: X	Recovery: Y Availability: Y	↔	↑

Score is 130+ the final training

in pre- and post-reports will show as.

ut usage of third party conferencing by decreasing 0% per month.

## Success Criteria Examples

# ... and Measure Success



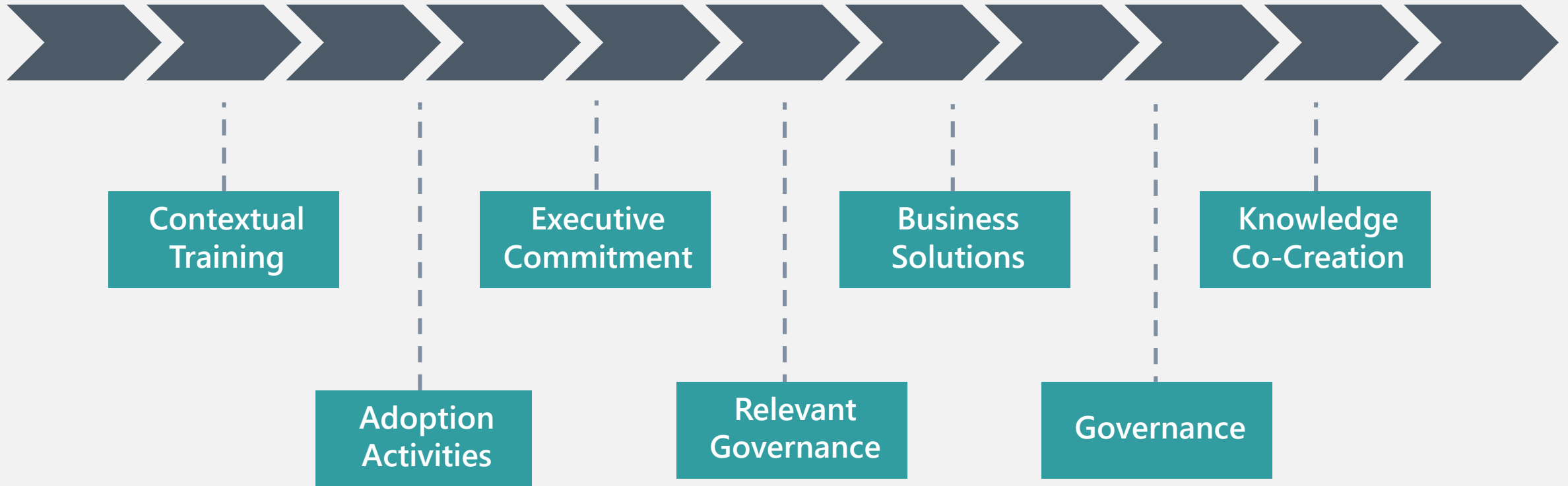
Achieve real business relevance by measuring your outcomes in terms of ROI. Use enterprise social engagement data to support your findings.

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.



# ∞ Lather, Rinse, Repeat

## Office365 Journey



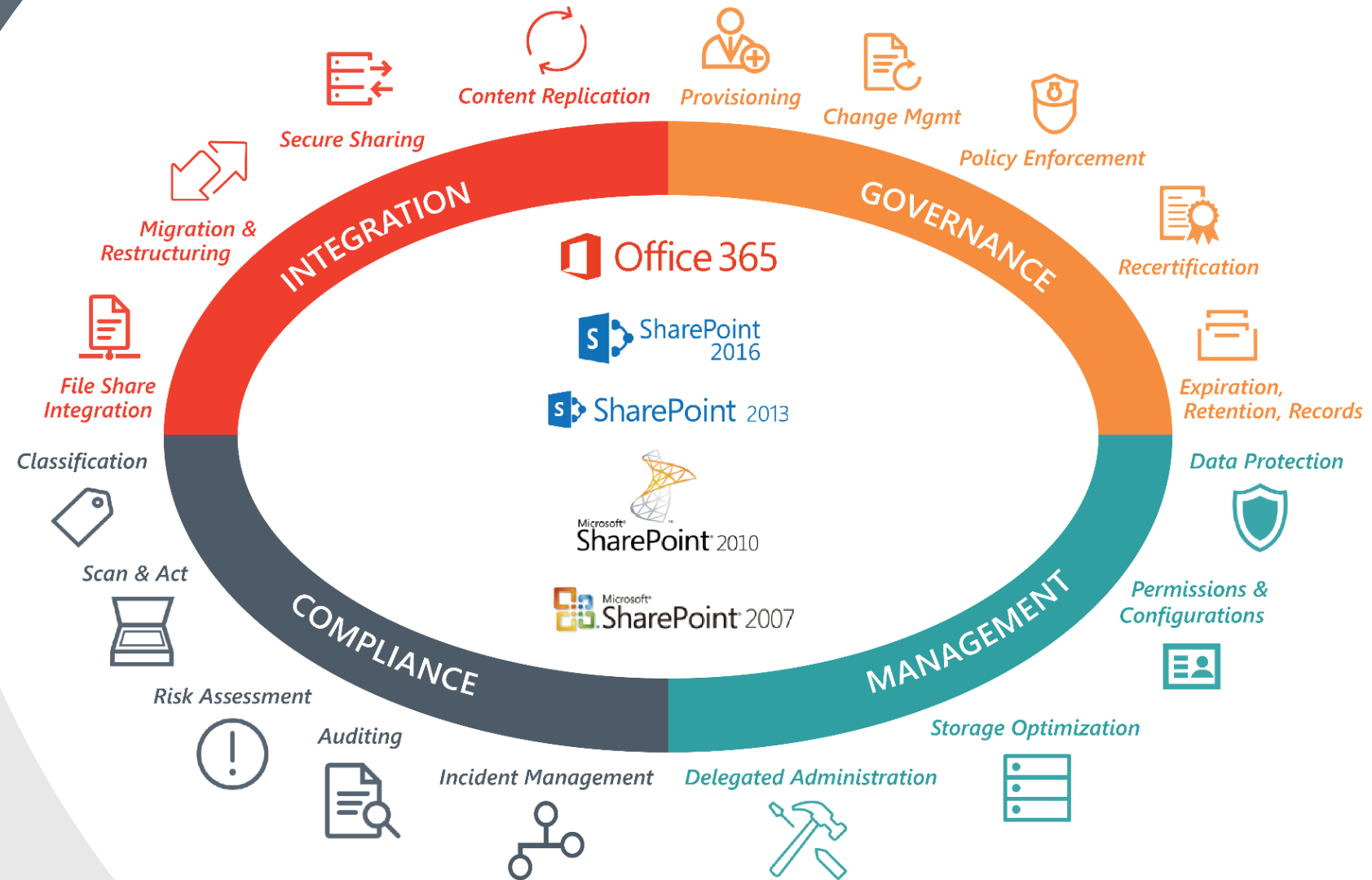
# What We Covered

- 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)



# 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!](#)



Join us at  
**SharePoint Saturday**  
**Charlotte**  
December 14<sup>th</sup>, 2019



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

متشكراً

Salamat Po

감사합니다

Cám ơn

شكريه

Terima Kasih

Dank u Wel

Děkuji

நன்றி

Köszönöm

ありがとう  
ございます

ໂພນຊຸມນັບ

Dziękuję

谢谢

Tack

Mulțumesc

спасибо

Merci

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