



# Tailor Microsoft Teams to Accelerate Your Line of Business Collaboration & Communications

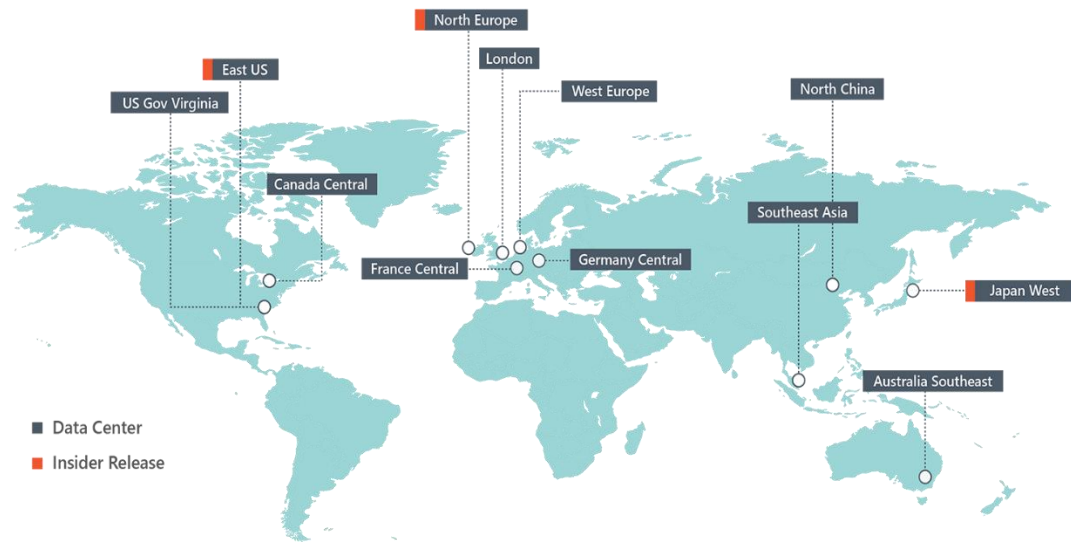
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Principal Solutions Engineer | AvePoint  
Microsoft Service Adoption Specialist  
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Twitter: @funsterD



# About AvePoint

- Migrate. Manage. Protect.



12 Global Cloud Instances

99.5% Availability Backed by Azure

24/7 World-Class Support

20PB+ Managed Customer Data

ISO Certification



27001:2013



16K  
Customers

6M  
Cloud Users

88  
Countries

7  
Continents

**AvePoint** is headquartered and maintains its principal operational center in Jersey City, NJ, with approximately 1,500 employees across five continents.

Microsoft  
Partner



2017 Partner of the Year Winner  
Public Sector: Microsoft CityNext Award

2016 Partner of the Year Winner  
Technology for Good Citizenship Award

2015 Partner of the Year Winner  
Collaboration and Content

2014 Partner of the Year Winner  
Public Sector: Public Safety and National Security



# Agenda

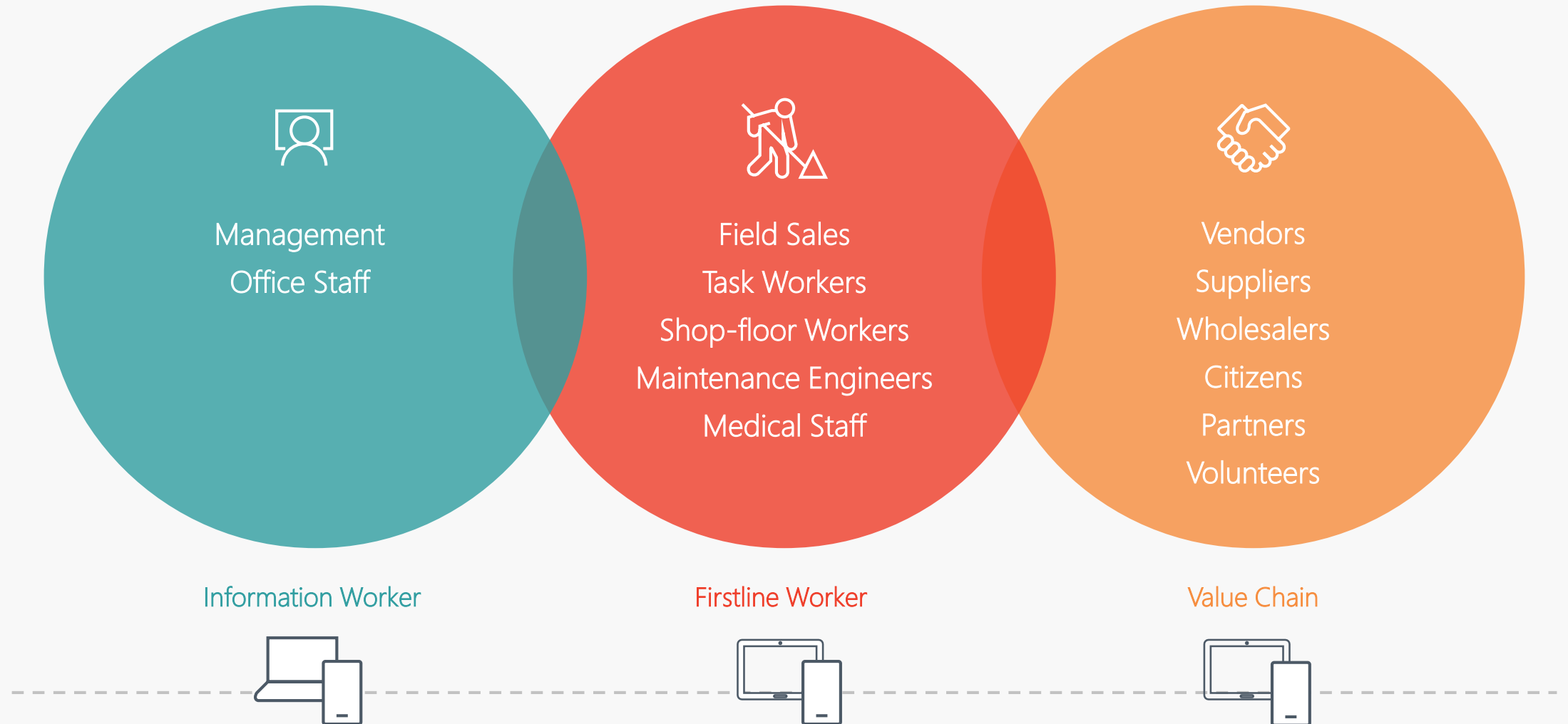
- The New Culture of Teamwork
- Teams Customization / Extension
- Enable Business Solutions
- Teams Governance
- Drive Sustainable Adoption
- Wrap Up



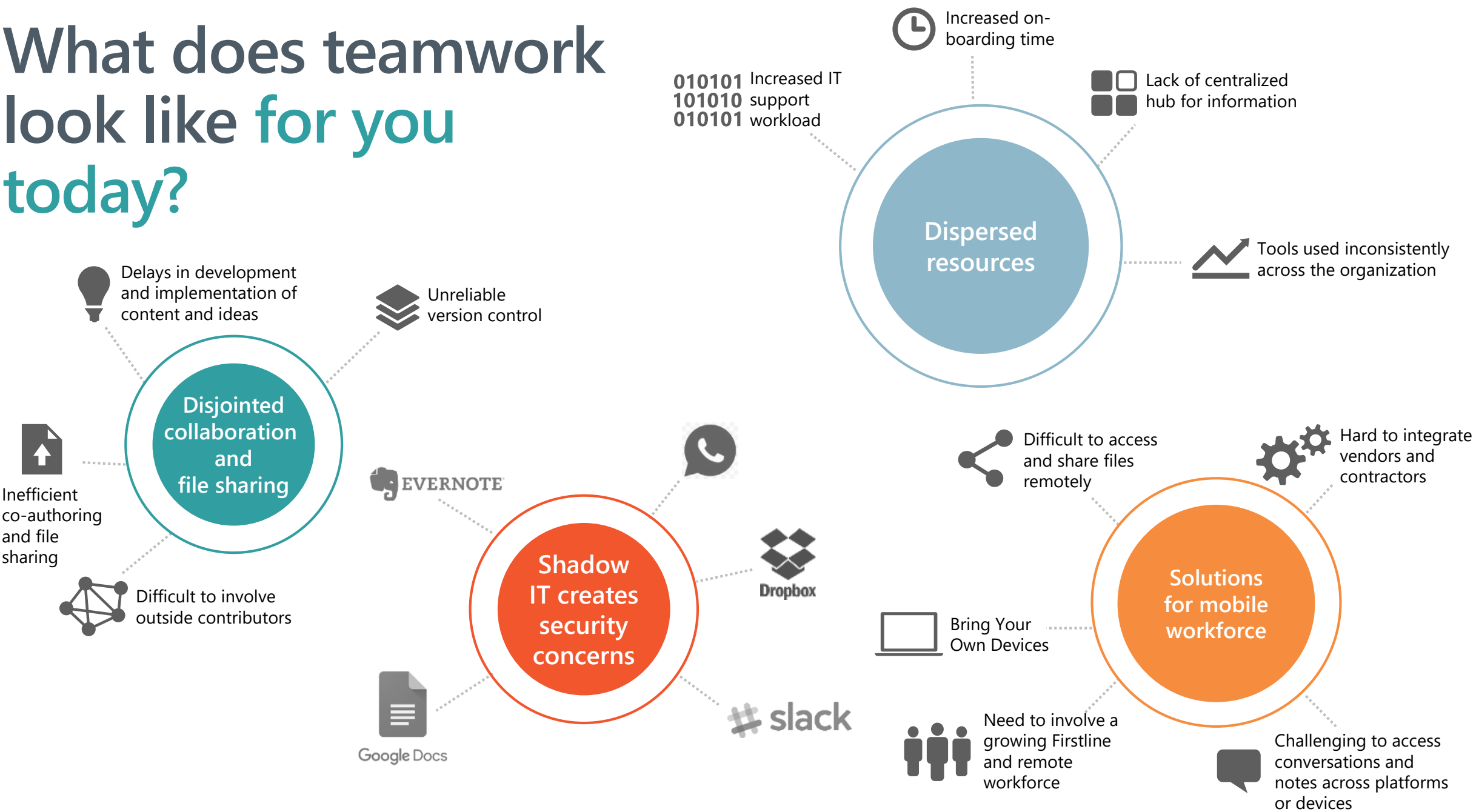
# The New Culture of Teamwork



# Today's modern workforce



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



# 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



# Imagine a world where you can integrate...

Your business apps

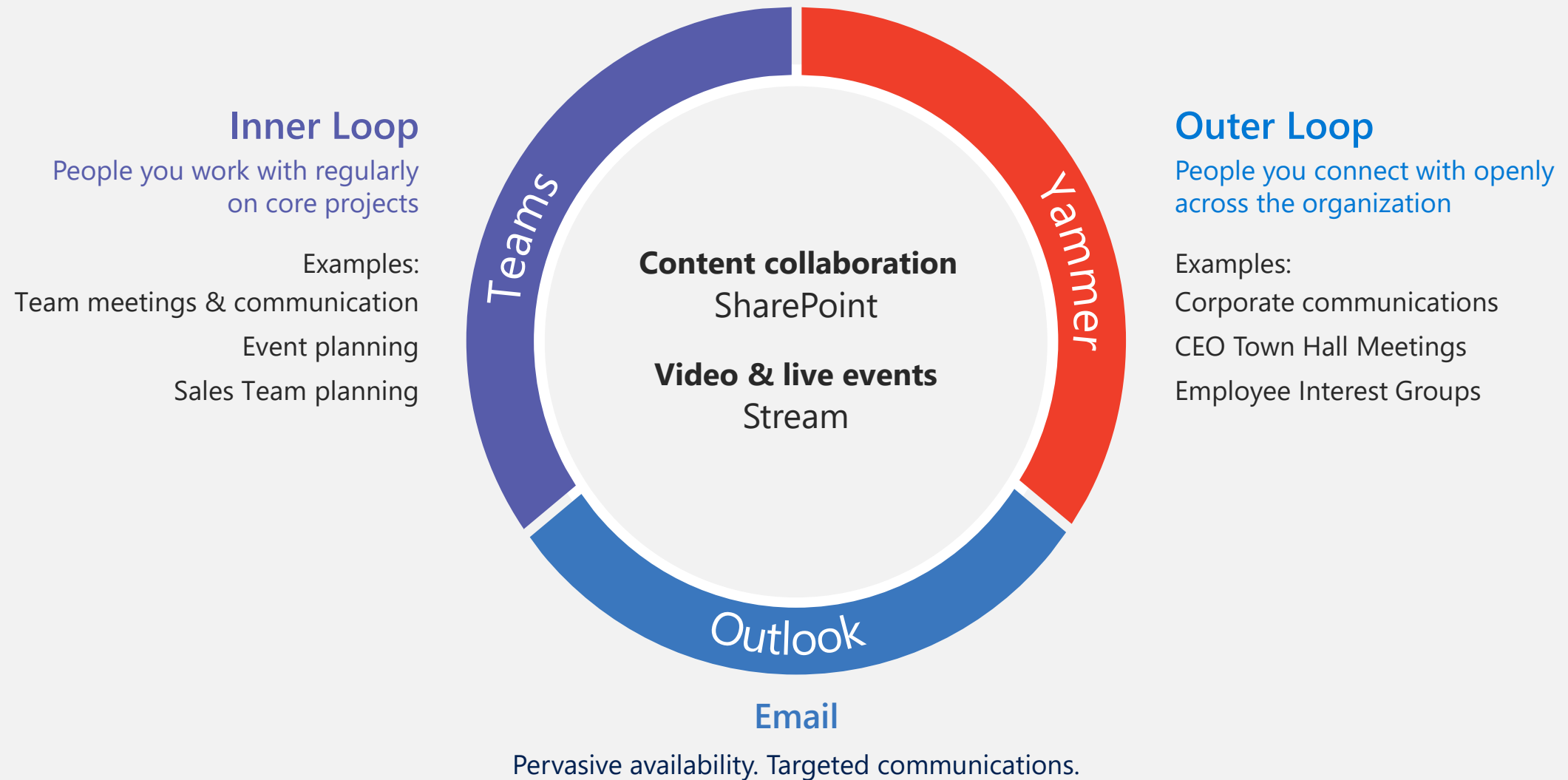
Routine workflows

Communication and collaboration

All in a single hub



# Teamwork in Microsoft 365



# What can Teams do for your business



Transform workplace collaboration



Streamline business processes

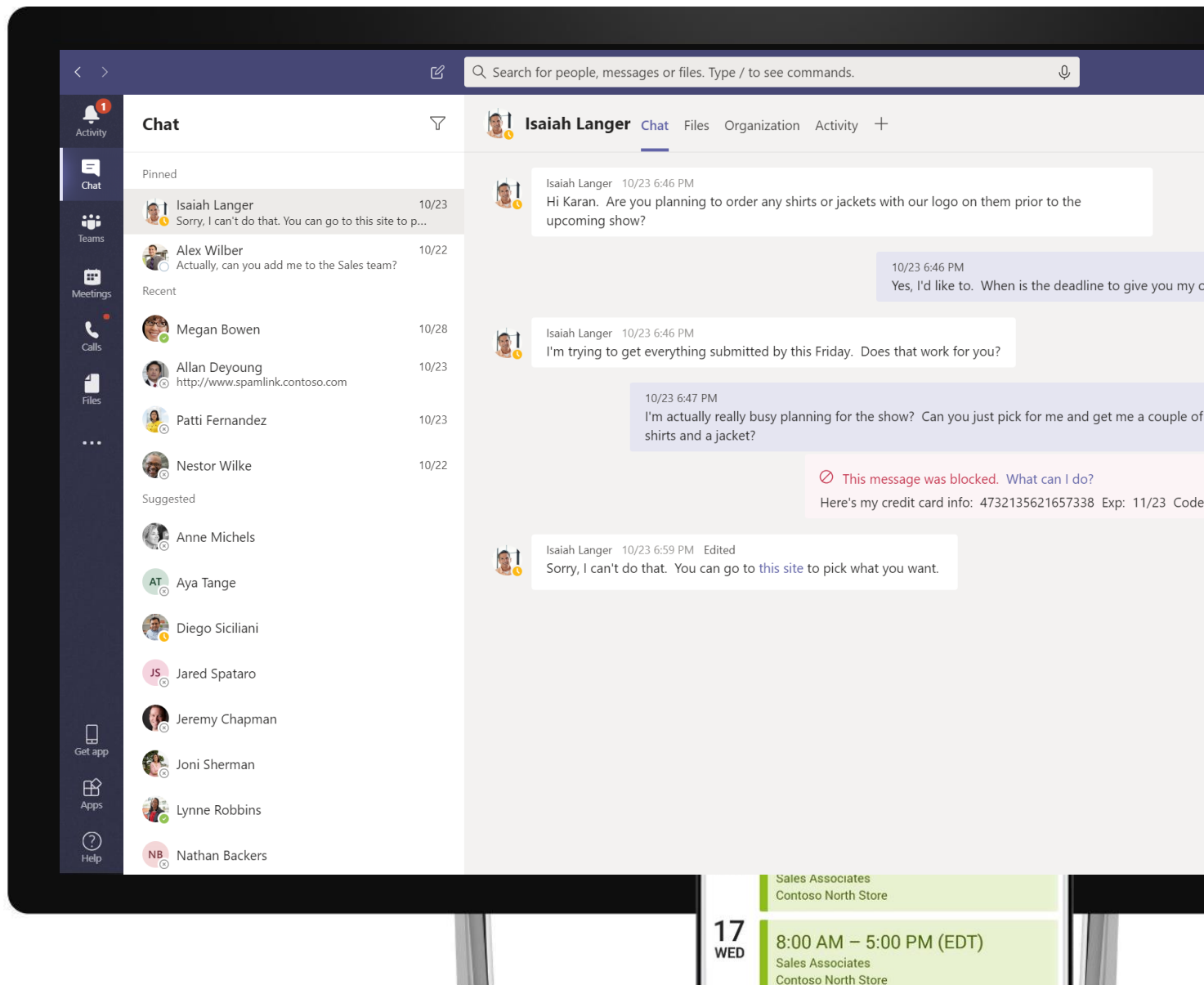


Connect everyone on a single platform



Provide enterprise grade security & compliance

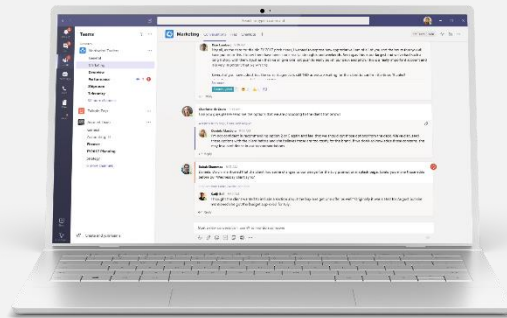
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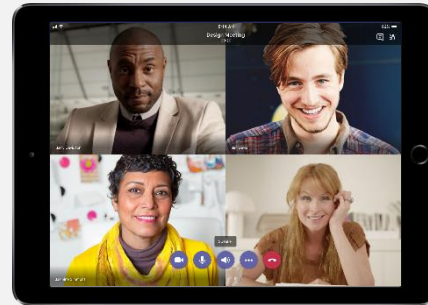
# Three ways to access your Teams

## Desktop



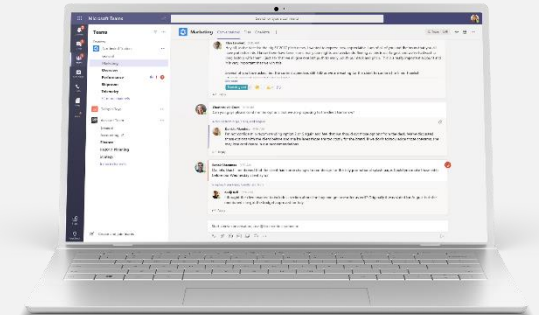
Windows 7+

## Mobile



iPad

## Browsers



Edge



Chrome



Firefox



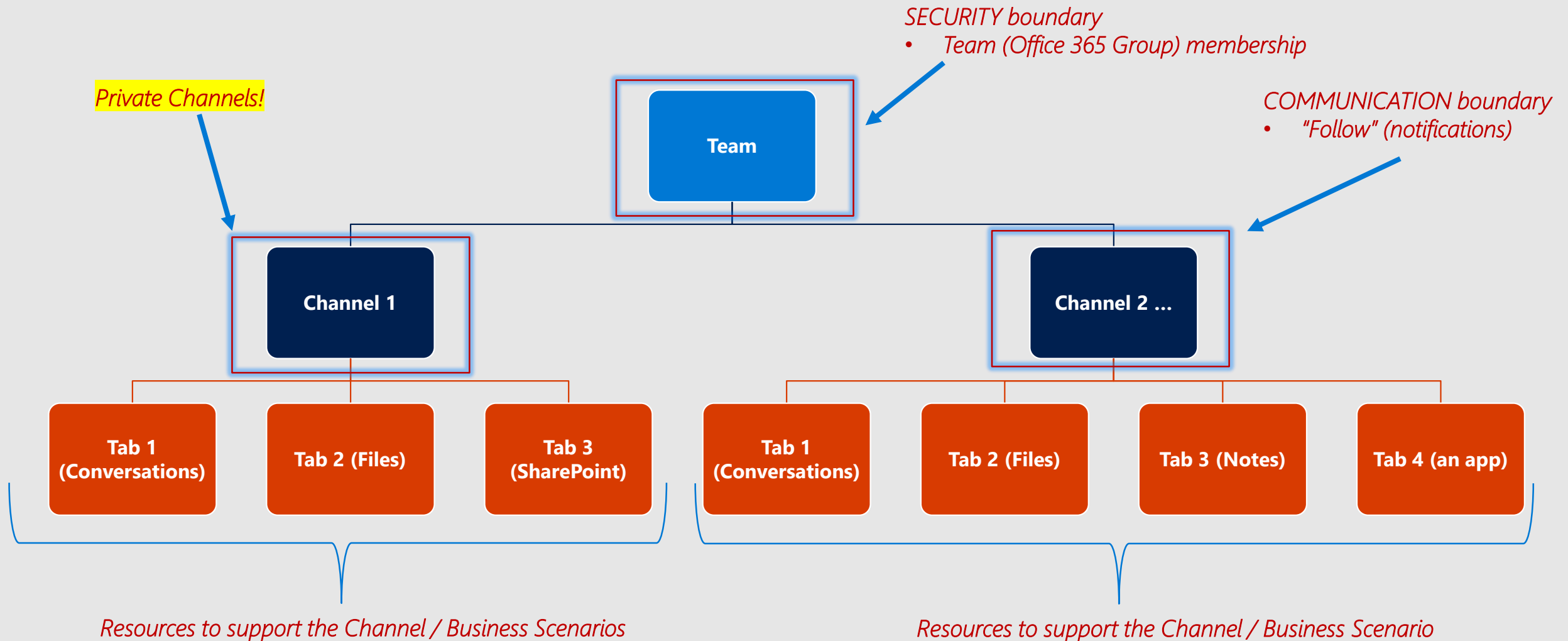
OS X 10.10+

iPhone

Android

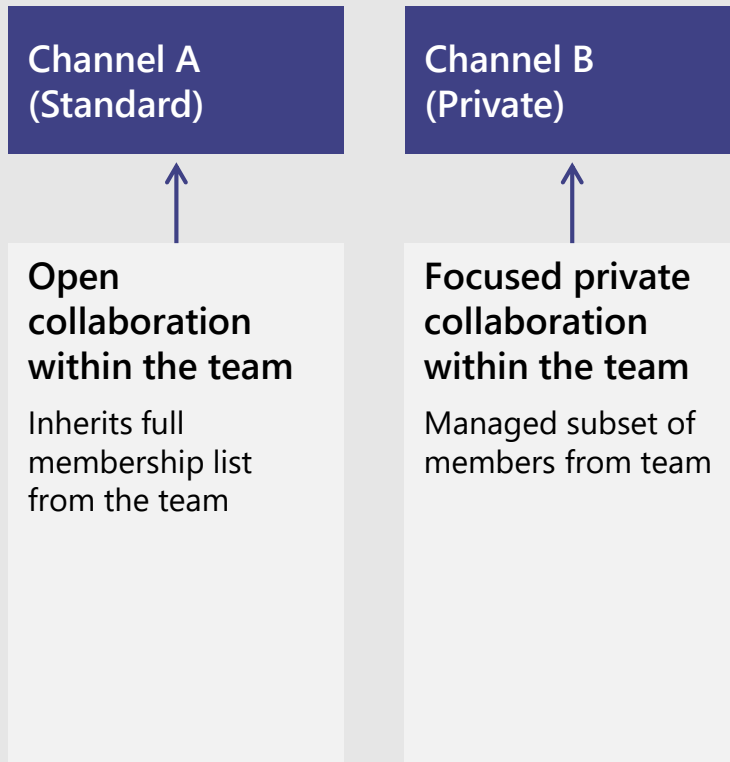


# The basic shape of a Team



# Private Channels (New)

Focused private collaboration within a team



## Access control of channel content

- Separate SPO site collection for files with access restricted to channel members
- Copy of channel messages in private channel user mailboxes for compliance

## Creation

- Admins can control via policies who can create private channels in tenant
- Team owners can control via setting if members can create private channel in team

## Membership

- Only existing members and guests in the team can be added to a private channel
- Only members of the private channel can view private channel content

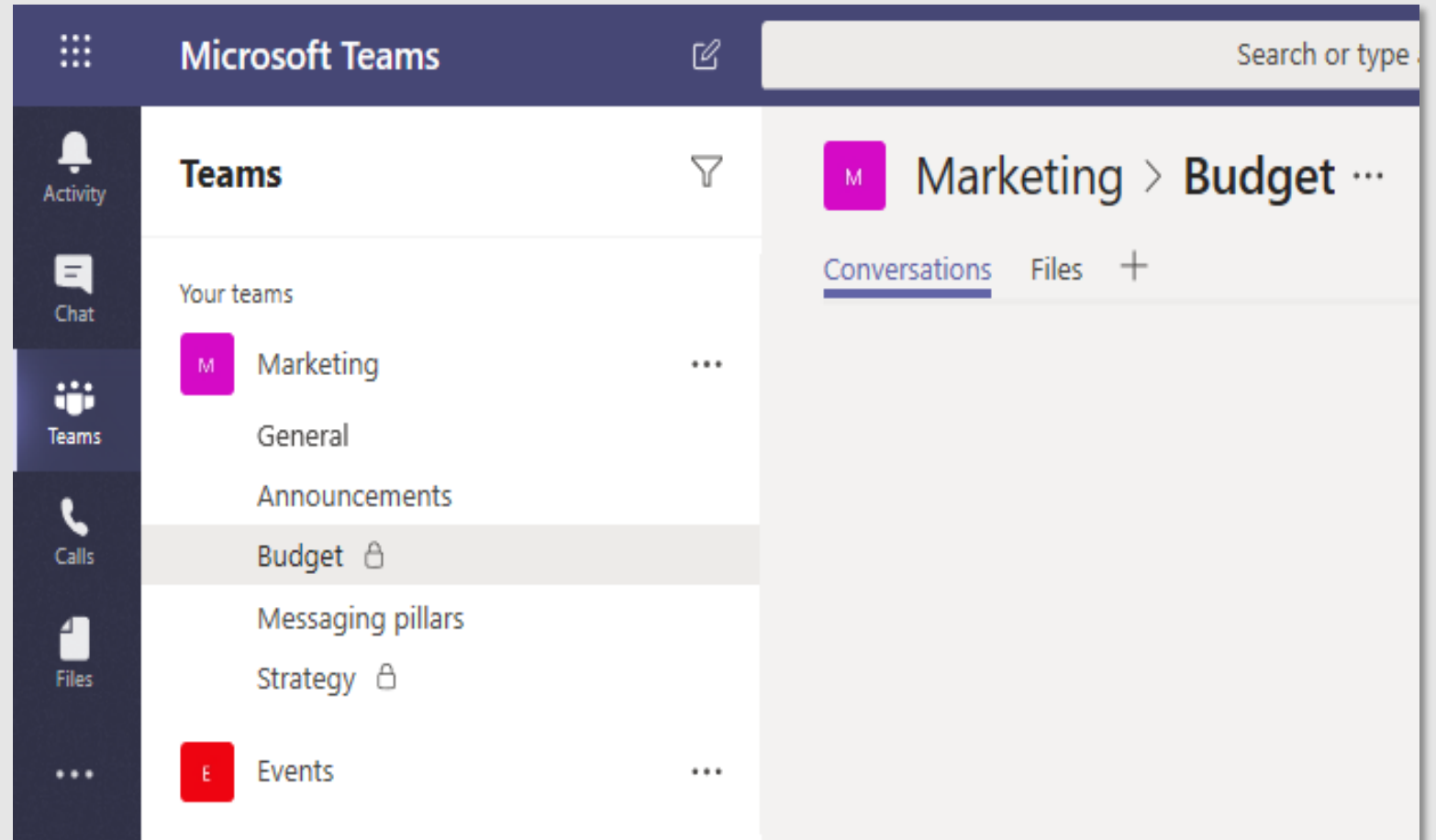
## Lifecycle and classification tied to parent team

- Private channel lifecycle is tied to parent team
- SP site data classification and lifecycle same as private channel



# Private Channels (New!)

- Only the users on the team can access the channel.
- Anyone can be added as a member of a private channel if they are already a member of the team.
- May be used if...
  - You want to limit collaboration to select audience
  - You want to collaborate with a subset without having to create an additional MS Team

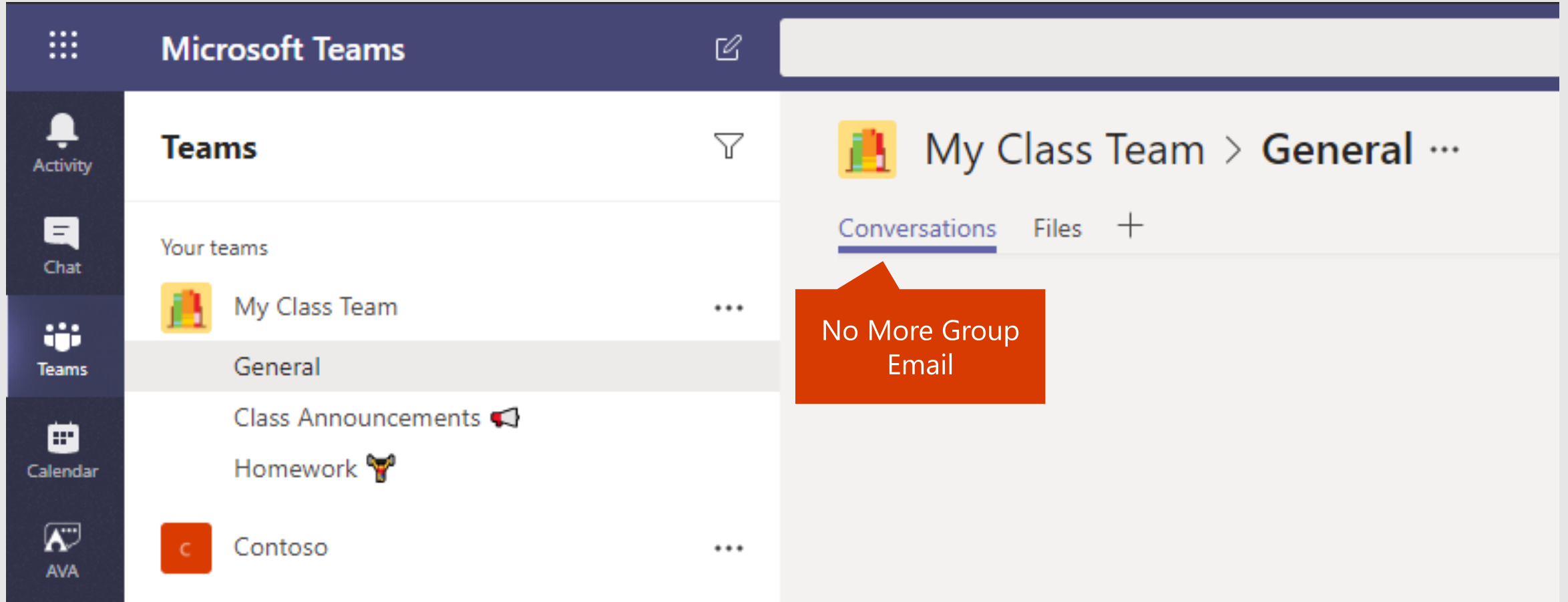


# When to Create a Private Channel

Is there already a team that has these people as team members?	Does this work need to be kept private from others?	Are there multiple distinct topics to discuss?	Recommendation
Yes	Yes	Yes	Create a private channel in the existing team or consider creating dedicated private channels for each topic.
Yes	Yes	No	Create a private channel in the existing team.
Yes	No	No	Create a channel in the existing team.
No	No	No	Consider creating a new team.
No	No	Yes	Consider creating a new team and then, depending on the confidentiality of each topic, consider creating separate standard or private channels for each topic.
No	Yes	No	Create a new team or create a new private channel in an existing team.


<https://docs.microsoft.com/en-us/microsoftteams/private-channels#when-to-create-a-private-channel>

# What to use and when in Teams





# 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, etc.  
[www.avepoint.com](http://www.avepoint.com)

**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? 4

**Spenser Bullock** 7/2 6:29 AM  
Yes, will do! 1

**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?** 3

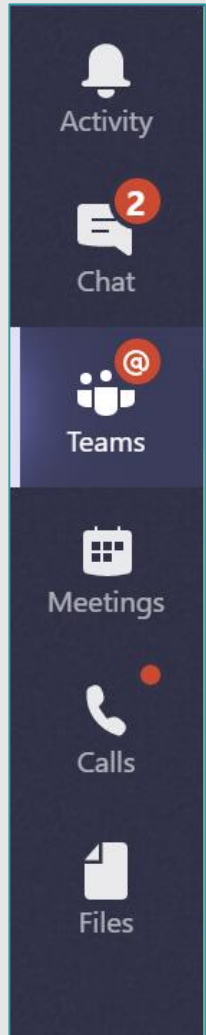
**Sarah Zalesiak** 7/15 11:02 AM  
**Megan Hoel** can you craft some copy for the sales teams to share out on their social channels? thinking something they can push out on their feeds as well as something they can send via linkedin messaging 3

**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? 3

← Reply



# Example: Move email addicts to Teams



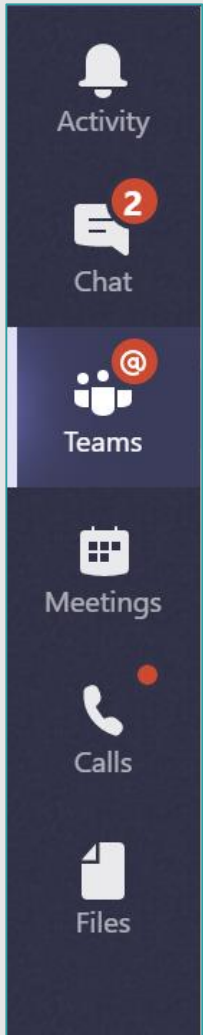
## Your email...

- 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

# The Difference between TEAMS and CHATS



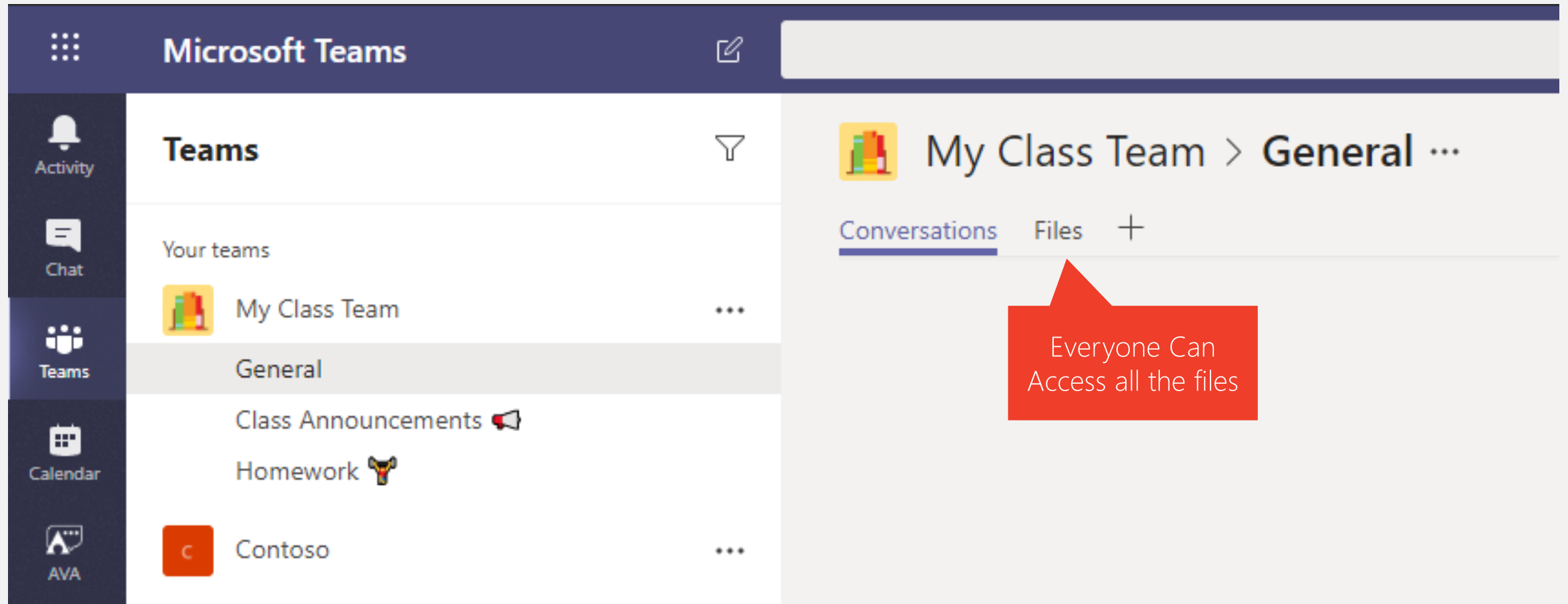
## Team Conversations (Posts)

- Visible to all Team members/owners
  - Except Private Channels
- 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

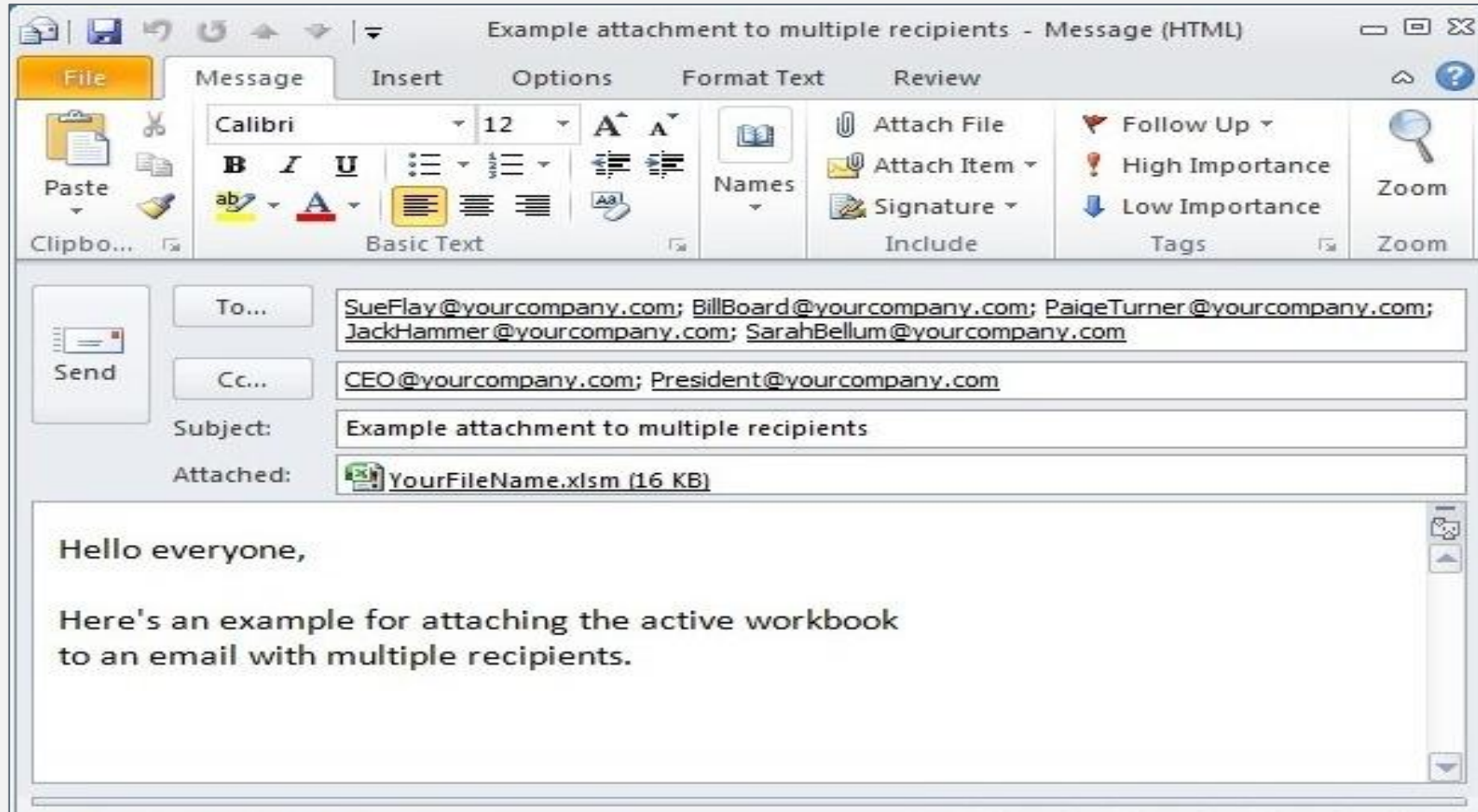
## Chats

- 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

# What to use and when in Teams

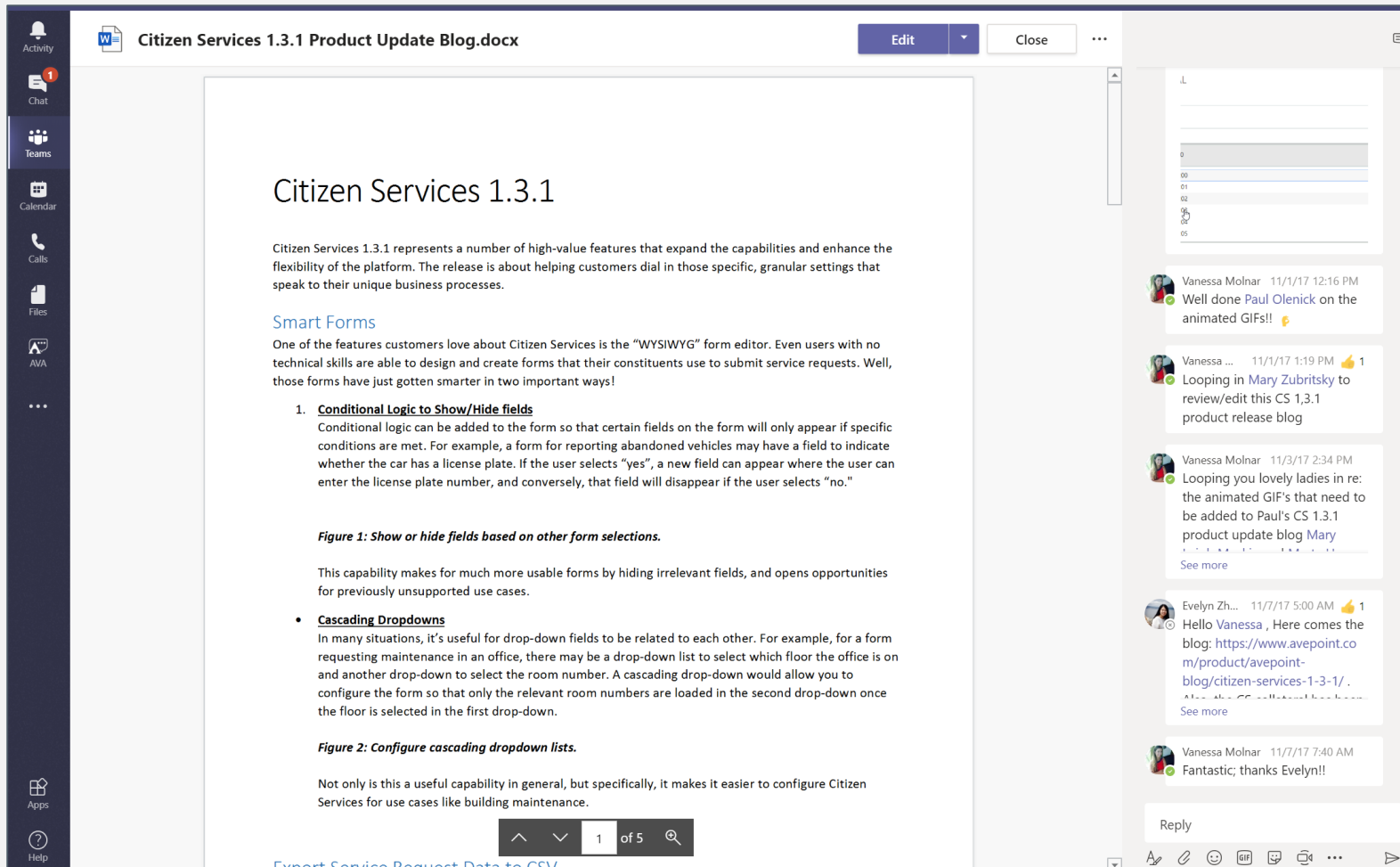


# Document Collaboration via Email





# 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!!



# Understanding the SharePoint and Teams relationship

The diagram illustrates the relationship between a Microsoft Teams channel and a SharePoint document library. On the left, the Microsoft Teams interface shows a sidebar with navigation options: Activity, Chat (2), 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. A red arrow points from the 'BGLeads' team header to the 'BGLeads' group in the SharePoint interface on the right. The SharePoint interface shows the 'BGLeads' group with a 'Documents' library. The library contains a list of documents with columns for Name and Modified. The documents are: BG Virtual Stand-up (July 16), BG-Dev Workshop May 2018 C... (April 24), Field Feedback (March 15), General (November 17, 2017), GTM-Sales (August 14, 2017), Product Strategy (August 14, 2017), Project Tasks (6 days ago), SP 2019 (July 3), and Technical Partnerships (August 14, 2017). A red bracket groups the 'General' channel and its sub-channels in Teams, with an arrow pointing to a large grey 'X' that blocks the path to the 'Field Feedback' document in the SharePoint library. A red callout box says 'Create manually on the site'.

Activity

Chat 2

Teams

Meetings

Calls

BGLeads

General

BG Virtual Stand-up

BG-Dev Workshop 2018

GTM-Sales

Product Strategy

Project Tasks

SP 2019

Technical Partnerships

2 more channels

BGLeads

Private group

+ New

Upload

Quick edit

Sync

Export to Excel

Documents

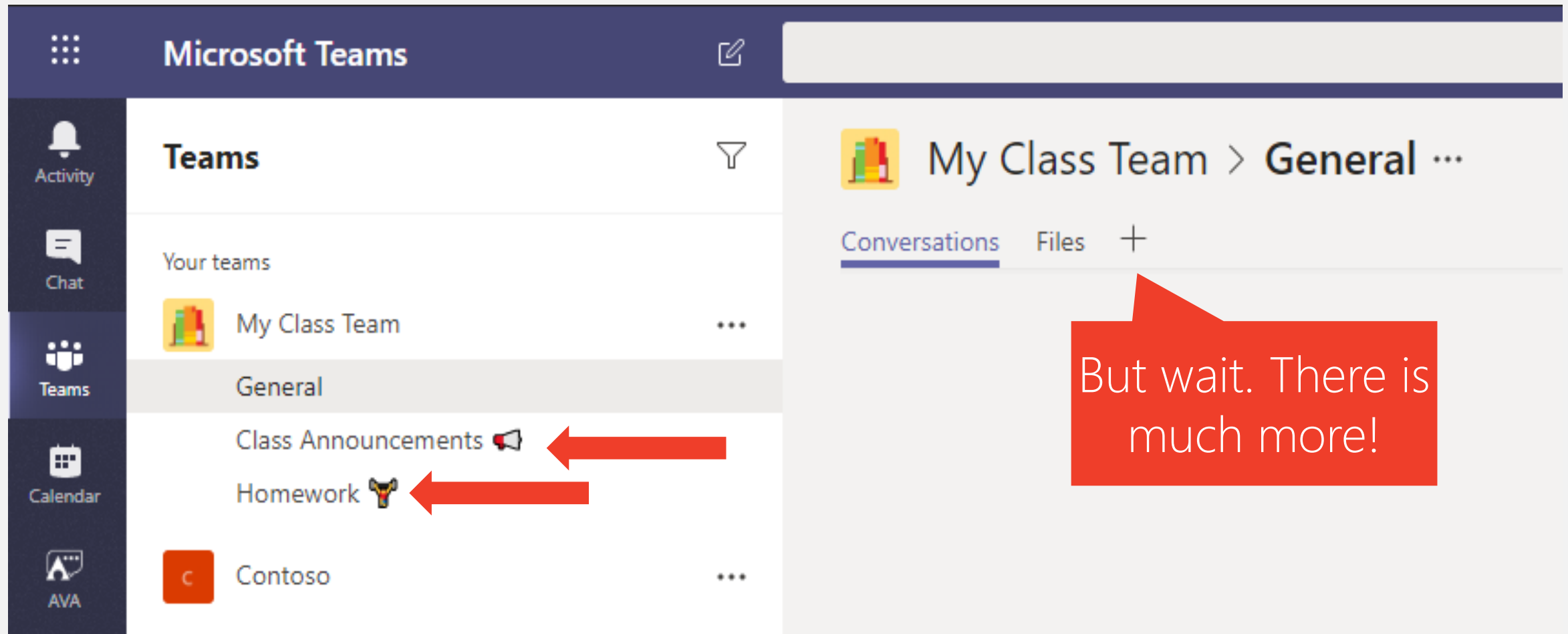
Name	Modified
BG Virtual Stand-up	July 16
BG-Dev Workshop May 2018 C...	April 24
Field Feedback	March 15
General	November 17, 2017
GTM-Sales	August 14, 2017
Product Strategy	August 14, 2017
Project Tasks	6 days ago
SP 2019	July 3
Technical Partnerships	August 14, 2017

Create manually on the site



# What to use and when in Teams

Encourage owners to design the channel tabs so that users can find things quickly



# Structure of a real-life Team

The screenshot illustrates the structure of a real-life team in Microsoft Teams, with several key components highlighted by annotations:

- The TEAM:** A red arrow points to the "US-PubSec" team name in the left-hand navigation pane.
- The Team's CHANNELS:** A teal arrow points to the list of channels (General, FED Sales, Knowledge Channel, etc.) within the "US-PubSec" team.
- Channel TABS:** An orange arrow points to the tabs at the top of the "Knowledge Channel" view, including "Conversations", "Files", "AP Wiki", "AP University", "L&L Planner", "Resources", and "1 more".
- Transparency:** A blue arrow points to the "Private" status indicator in the top right corner of the channel view.

The main content area displays a message from "Taylor Davenport" titled "Following Group Emails in Outlook", dated 7/26 1:13 PM. The message includes a quick reminder to follow the US-Federal Group in Outlook and a screenshot of the Outlook interface showing the "SLED TEAM" group.



# Understanding “Public” content visibility

The screenshot displays the Microsoft Teams interface. On the left, the navigation pane shows the 'Contoso News' channel selected. The main area shows the 'General' channel page. A red box highlights the 'Public' visibility setting in the top right corner. Below this, the 'People and Groups' view for 'Contoso News Members' is shown. A red arrow points to the 'Settings' dropdown menu in the 'People and Groups' view, which is currently open, showing options like 'Contoso News Members', 'Contoso News Visitors', 'Contoso News Owners', and 'More...'. The 'Settings' dropdown is also highlighted with a red box.

Search or type a command

Public

Contoso News > General ...

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...

New Actions Settings

Name About me Title Department

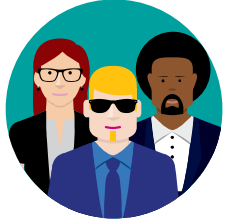
Contoso News

Everyone except external users

View: Detail View



# 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.

# Teams Customization and Extension

# 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



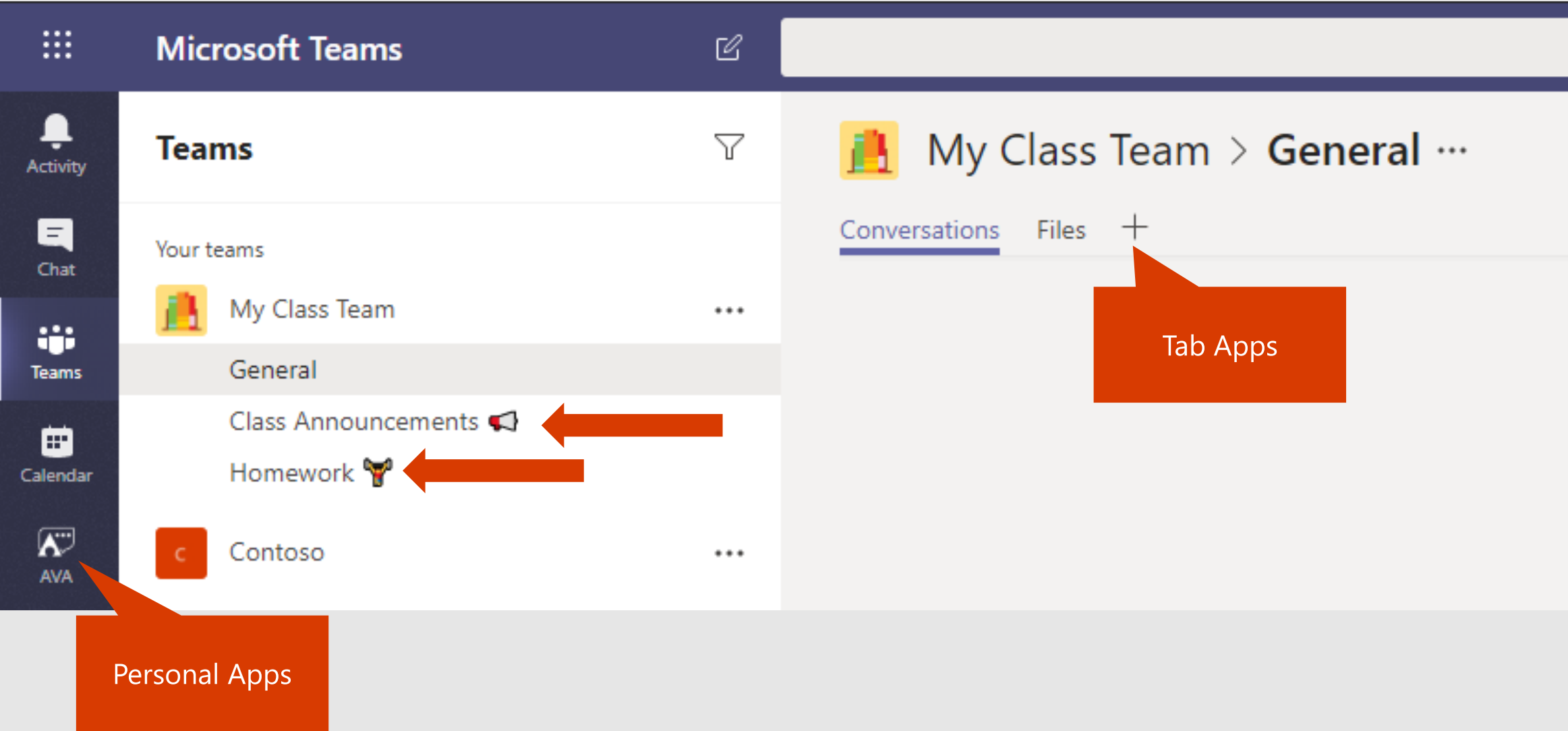
Microsoft Teams



make your apps work for **you**

# Different App Modes in Teams

Encourage owners to design the channel tabs so that users can find things quickly and in one place





Unlock productivity with  
**150+** integrations



# Microsoft 365 certified apps(starting with Teams)



Adobe Sign



Dynamic Signal

Wrike

## Microsoft 365 publisher-attested apps



AvePoint



AtBot



Bonusly



Evernote



MailClark



Polly



SOCIALINTENTS



... and more



# App Trust using Microsoft 365 Certification

## Application Security

Pen-test, SAST/DAST

## Operational Security

Malware, Patch Management,  
Incident Response, Vulnerability scan  
and Risk Management

## Data Handling Security and Privacy

Data Retention and Disposal, Data  
Access and Approval & GDPR

## Compliance Claim Checks

SOC2, PCI-DSS, ISO27001

**Contoso Electronics** Microsoft Teams admin center

### Manage apps

When you are managing apps for your organization, you are controlling what apps are available to users in your organization's app store. You can then use app permission and app setup policies to configure what apps will be available for specific users. [Learn more](#)

+ Upload new app   ✓ Allow   ⛔ Block   318 Items   🔍 Search   ⚙️

Name ↑	Certification ⓘ	Categories	Publisher	App status ⓘ	Custom app
+BI Collaboration	--	Communication, DataVisualization	Ataira Analytics Inc.	Allowed	No
ADP Virtual Assis...	--	HumanResourcesAndRecruitin	ADP	Allowed	No
AIアシスタントボット	--	HumanResourcesAndRecruitin	TIS Inc.	Allowed	No
ASC Recording In...	--	Communication, FilesAndDocu	ASC Technologies AG	Allowed	No
AVA	--	Productivity	AvePoint, Inc.	Allowed	No
Achievers	--	HumanResourcesAndRecruitin	Achievers	Allowed	No
AddressLook	--	Productivity	Big Bang System Corp.	Allowed	No
Adobe Creative C...	--	Productivity	Adobe	Allowed	No
Adobe Sign	Microsoft 365 certified	WorkflowAndBusinessManage	Adobe Systems Inc.	Allowed	No
Advisor for Teams	--	Microsoft	Microsoft	Allowed	No
Advisor for Team...	--	Microsoft	Microsoft	Allowed	No



# App Trust using Microsoft 365 Publisher Attestation

## Accelerate Adoption


Expedite the enterprise review process so apps get reviewed and turned on faster

## Build Trust

Provide visibility and confidence in compliance of apps through developer provided security, data handling information

## Access Easily

All developer provided app assessments in a single location & consistent format across 90+ vendors

App	Partner	Self-Attested?	Data Handling Information	Cloud App Security Information	Cloud Security Alliance Information	App Capabilities
<a href="#">ADP Virtual Assistant</a>	ADP		No	Yes	No	Bot, Tab
<a href="#">AVA</a>	AvePoint, Inc.		No	No	Yes	Bot, Tab
<a href="#">Adobe Sign</a>	Adobe Systems Inc.		Yes	Yes	No	Bot, Tab
<a href="#">Aha!</a>	Microsoft Teams Ecosystem		No	Yes	No	Connector

[Airbrake](#)Microsoft Teams Ecosystem

[ApproveSimple](#)Caprizo, Inc

[Asana](#)Asana, Inc.

[Assistant @ Zoom.ai](#)Zoom.ai Inc


[AtBot](#)H3 Solutions, Inc.

[Axure Share](#)Axure


[Beanstalk](#)Beanstalk

[Bitbucket](#)SoftServe, Inc.

### Adobe Sign

06/27/2019 • 3 minutes to read •  Applies to: Microsoft Teams

Choose the category of information you want to see for this app:  
[General](#) [Data Handling](#) [Security and Compliance](#)

 The information on this page is based on a self-assessment report provided by the app developer on the security, compliance, and data handling practices followed by this app.

Last updated by the developer on: —

- [View in Teams store](#)
- [View in AppSource](#)

#### General information

Information provided by Adobe Systems Inc. to Microsoft:

Information	Response
App name	Adobe Sign
ID	0f56a9d1-f502-40f9-a9e8-816d7adbb68b
Capabilities	Bot, Tab



# Publishing your app for Microsoft Teams

## Publish to the store

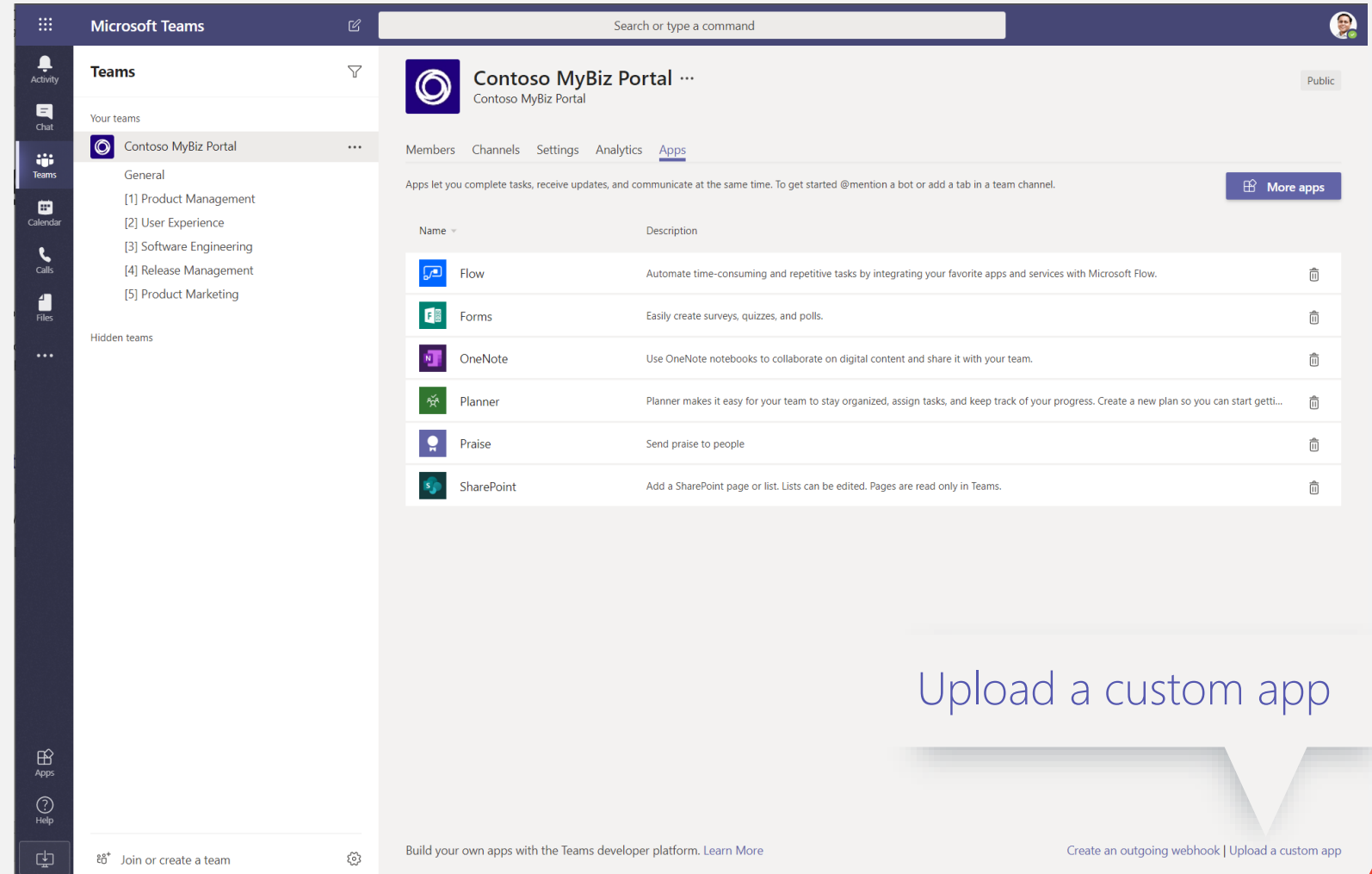
Make your app available to the world. Let people know the category of your service, include screenshots and videos and easy to access app details that show off your app's capabilities and skills

## Publish to your tenant

When your app is designed to support a specific function in your company you can make it easy to find for all your company's users. We've got a great place for your admin to host all your internal apps and they can suggest publicly available apps here too

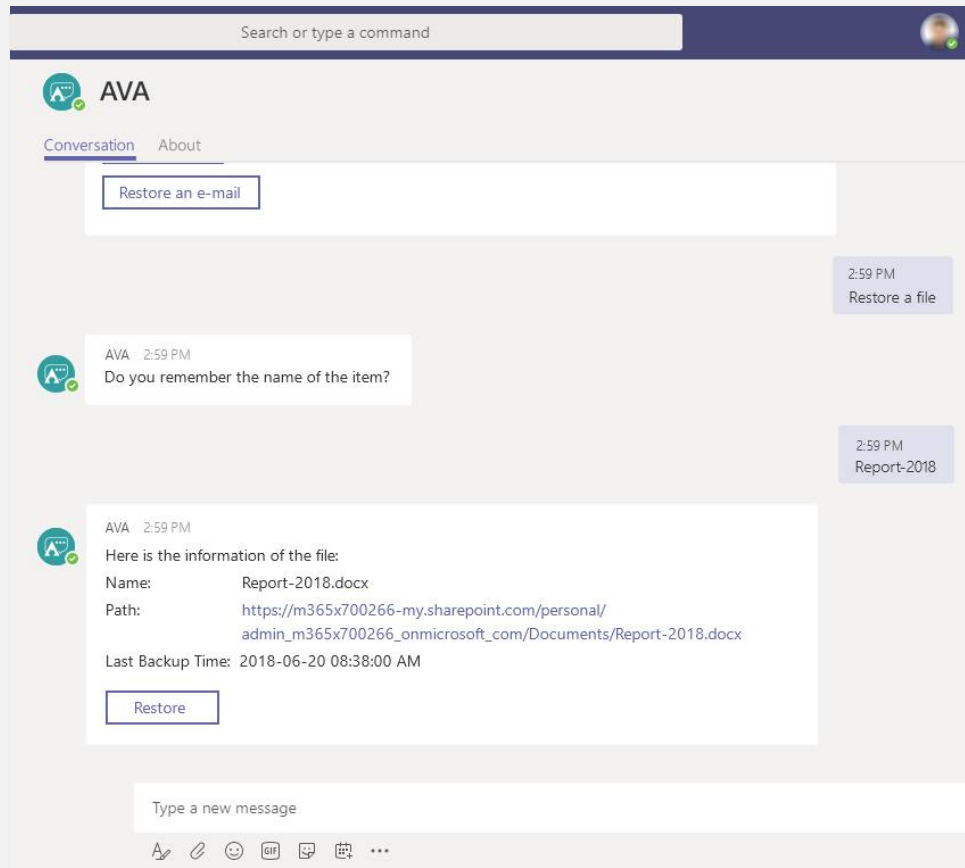
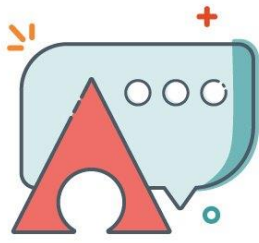
## Publish to a team

When you want to test your app or if it was designed for a specific group of people you can sideload your app and use it right away



Demo

# AVA: Restore Deleted Emails + Files



Give users a place to look for lost content:

- Filenames that can't be found
- Documents modified recently
- Broken URLs to documents and files
- Lost e-mails that can't be searched in Exchange / Outlook

Highlight quick-wins to limit support calls:

- Identify version history, first and second level recycle bins, soft-deleted content
- Identify recent data in AvePoint's backup data sets
- Fully security-trimmed to each user



# Enable Business Solutions



"Moving everyone to Teams elevates collaboration."

—Manager, technology



## Qualitative Benefits & Additional Impact

**4 hrs/wk**

are saved by information workers through improved collaboration and information sharing

**17.7%**

improvement of time-to-decision made by decision makers

**150 trips**

average number of overnight trips replaced with online meetings by Year 3

**88%**

of survey respondents felt "having all of our solutions in one place saves time"

**45 minutes**

per week are saved by firstline workers collaborating with colleagues

**18.9%**

reduction in meetings each week

Forrester study: The Total Economic Impact™ Of Microsoft Teams.





# Activity: Collaboration Pictionary

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## *Individual Activity*

1. Get 1 sticky note
2. Identify the most inefficient collaboration practice that you do

## *Group Activity*

1. Consolidate your collaboration practices
2. Identify the top three
3. Draw these three on the flip charts with no words

# 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

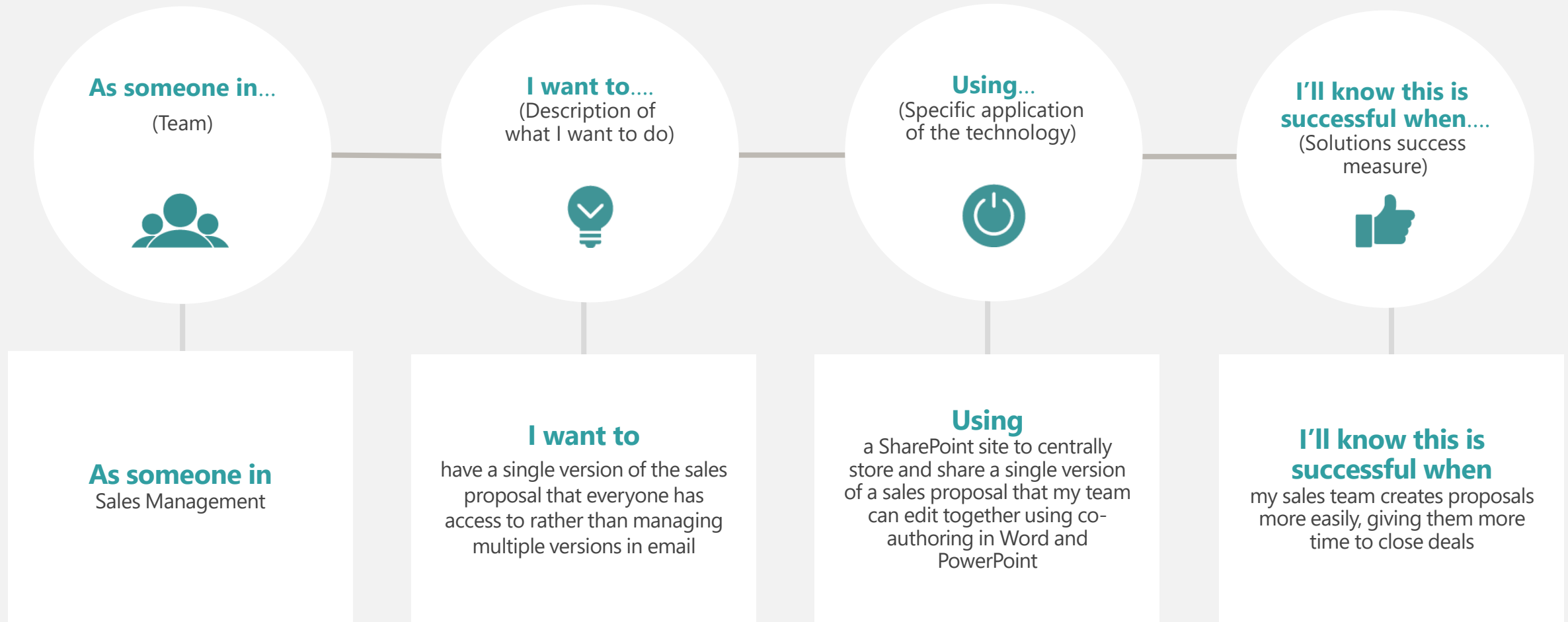
Manage project stakeholders, tools, budgets, project reviews and feedback.



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





Sales

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# Create Winning RFPs

Preparing an RFP requires bringing in a variety of resources and references while staying within budget commitments. You need one central location to assign tasks, review documents, and ensure RFP deadlines are met to create a winning proposal.

Create a Microsoft Teams channel to collaborate on the request for proposal (RFP) process. You can have conversations about project management, proposal deliverables, and budget. You can also upload documents right into the conversation to coauthor with colleagues and reference later. Use @mentions to notify team members you need them to weigh in on content.

Add Planner to your Teams channel and assign tasks to team members and track their progress. Follow up on requests with chat, video, or audio calls without ever leaving Teams. You can also use the Teams mobile app to work on the go from any device.

- Bring together project management, proposal deliverables, and budget activities in one location.
- Upload supporting RFP documents right into the conversation.
- Track and assign tasks to manage progress.



# The "Sales" Team, One App to rule them all

The screenshot displays the Microsoft Dynamics 365 Sales application interface. On the left is a dark navigation bar with icons for Activity, Chat, MyHub, Teams, and Calendar. The main content area is divided into sections: 'Teams' with a list of teams (Sales and Marketing, General, Forecast Calls, Monthly Reports), 'Ray Hill' with a list of reps (Rita Brewer), and a 'Sales and Marketing' section for 'Ray Hill'. The 'Power BI' tab is selected, showing a 'TotalSales by Division' pie chart and a 'TotalSales by Sales Period' line chart. The 'CRM' tab is also visible, showing a 'TotalSales by Sales Period and Division' line chart. Callouts highlight various features: 'PowerBI Dashboards' points to the Power BI tab; 'Instant access to CRM' points to the CRM tab; 'OneNote Account Notes' points to the Account Notes tab; 'Channels for Each Rep' points to the Rita Brewer rep card; and 'Other Common Resources just a Tab away' points to the 'Email Templates' and 'Discover Org' options in the CRM tab's dropdown menu.

PowerBI Dashboards

Instant access to CRM

OneNote Account Notes

Channels for Each Rep

Other Common Resources just a Tab away

Teams

Your teams

- Sales and Marketing
- General
- Forecast Calls
- Monthly Reports

Ray Hill

- Rita Brewer

Sales and Marketing > Ray Hill ...

Conversations Files Account Notes **Power BI** Travel CRM 2 more +

TotalSales by Division

Division ● Cameras

Sales Period	Cameras
Q2W1	300K
Q2W2	280K
Q2W3	290K

Quadcopters Phones Cameras

Contoso Q2 Division Sales

TotalSales by Sales Period and Division

Division ● Quadcopters

300K

200K 220K 240K 260K 280K 300K

Q2W1 Q2W2 Q2W3

Filters



Marketing

---



# Develop Go-To-Market Strategy



- Effective Go-to-Market (GTM) strategies require teamwork and communication to build successful product and service launches. Documentation must be findable and easily updated, and should be accessible to all team members, both internally and externally. Tasks and work items need to be tracked and completed to ensure delivery of a viable and successful strategy.
- Create easier ways for teams to collaborate on your next GTM strategy with dedicated channels in Microsoft Teams. Use one channel for market research or messaging pillars and another to start your strategic plan.

# Marketing for Success in Teams

All Presentations & Templates

Stream for past workshops recorded from teams

Forms for Post workshop survey

PowerBi Dashboard of Survey Data

Channels for Each Series

Search or type a command

Teams

Your teams

- Sales and Marketing
- TW Teams Workshop Series

General

- 2018 - Adoption series
- 2019 - Teams Governance
- 2020 - Teams Line of Business

Hidden teams

Conversations Files Presentations Edit | Post Workshop Survey 2 more +

Forms

Past Recorded Workshops

Presentation Stats

Preview Theme Share More

Responses

Post Workshop Survey

1. How well organized do you feel the workshop was logistically? \*

☐ Extremely well



## Sales Engineering Team

---

# Technical Sales and Support of Products

It takes teamwork and planning to sell and support products. Too often, teams are hindered by poor communication and outdated documents. You need your team to easily communicate and manage their workflow.

Improve your technical sales and support process by using Microsoft Teams as one central location to bring your teams, documents, and information together. Use your favorite Office 365 apps like Word to coauthor documents in real time, so you know you're always working on the latest version. Save all your corporate earning reports and support requests to your company SharePoint location.





# Sales Engineering Team

The screenshot shows a Microsoft Teams interface for a channel named 'Sales Engineering'. The left sidebar contains navigation icons for Activity, Chat, MyHub, Teams, Calendar, and Calls. The main area displays the channel's content, including a 'Go To Market Decks' tab and a 'Release Notes' tab. A 'Jira Cloud' tab is also visible. A table of documents is shown, listing files like 'RD Q2 Review.pptx', 'Quality Assurance Guidelines.pptx', 'Project Requirements.docx', 'Phone\_Mobile32i Customer Feedback.xlsx', 'HCI Research.docx', and 'Game\_Controller 3300 Design Proposal.pptx'. Callouts highlight specific features: 'Single Source for Marketing Collateral' points to the 'Go To Market Decks' tab; 'Stream for Recorded Training' points to the 'Release Notes' tab; 'Development Team Release Notes' points to the 'Release Notes' tab; 'JIRA for New Feature Requests' points to the 'Jira Cloud' tab; and 'Channels for Each Product' points to the 'Sales Engineering' channel name.

Stream for Recorded Training

Single Source for Marketing Collateral

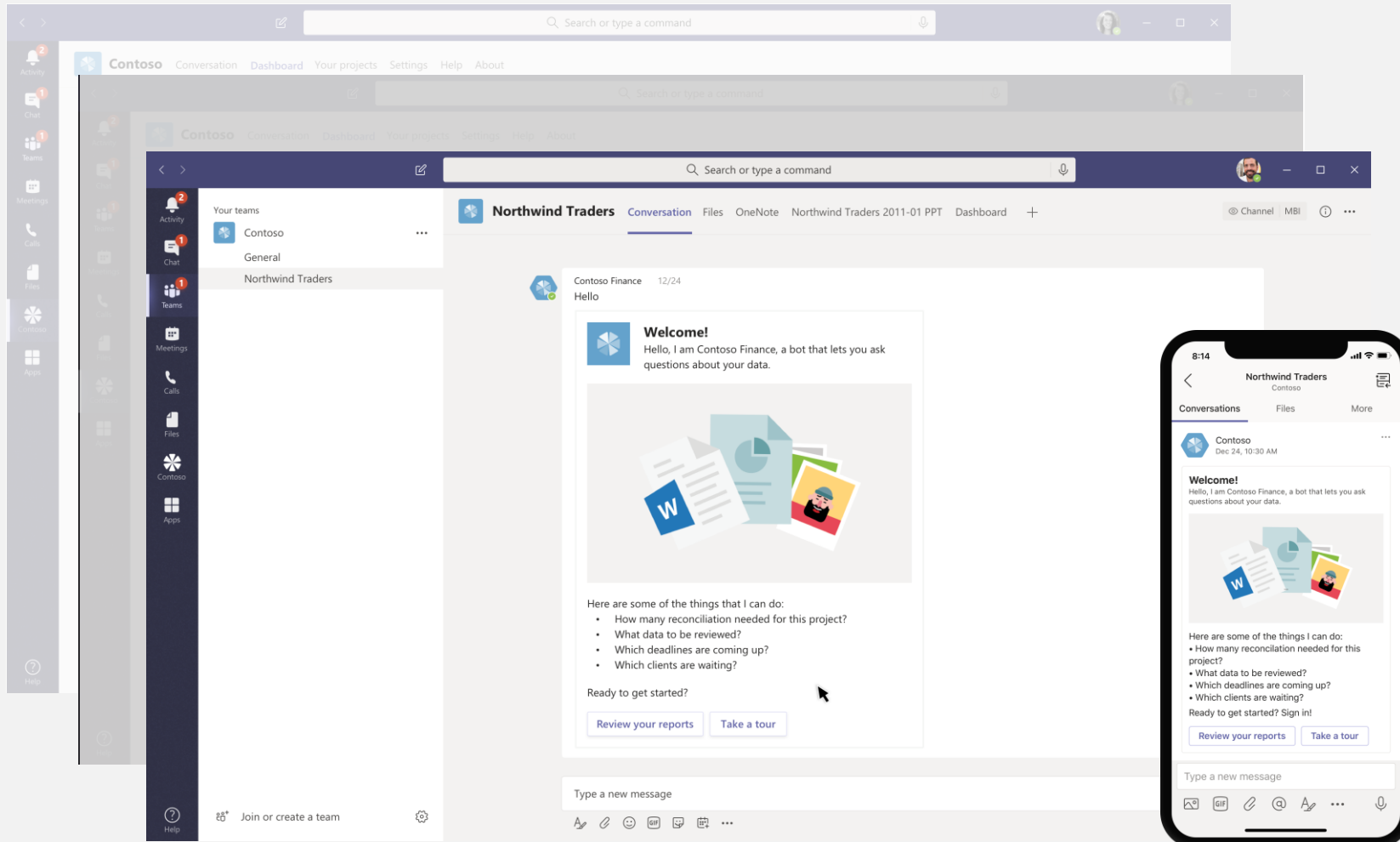
Development Team Release Notes

JIRA for New Feature Requests

Channels for Each Product

Type	Modified	Author
Excel	10/31/19	Megan Bowen
PowerPoint	10/31/19	Lidia Holloway
PowerPoint	10/31/19	Lee Gu
Word	10/31/19	Lidia Holloway
Excel	10/31/19	Grady Archie
Word	10/31/19	Lidia Holloway
PowerPoint	10/31/19	Irvin Sayers

# Automate using Graph API



Kicking off a new project can be easier  
Using Teams templates and your app you can automate the onboarding process

## Simplify known workflows

Select users who will be team owners vs. team members to comply with access and role limitations, pick documents in your service or on SharePoint to add to the mix. Add a welcome message

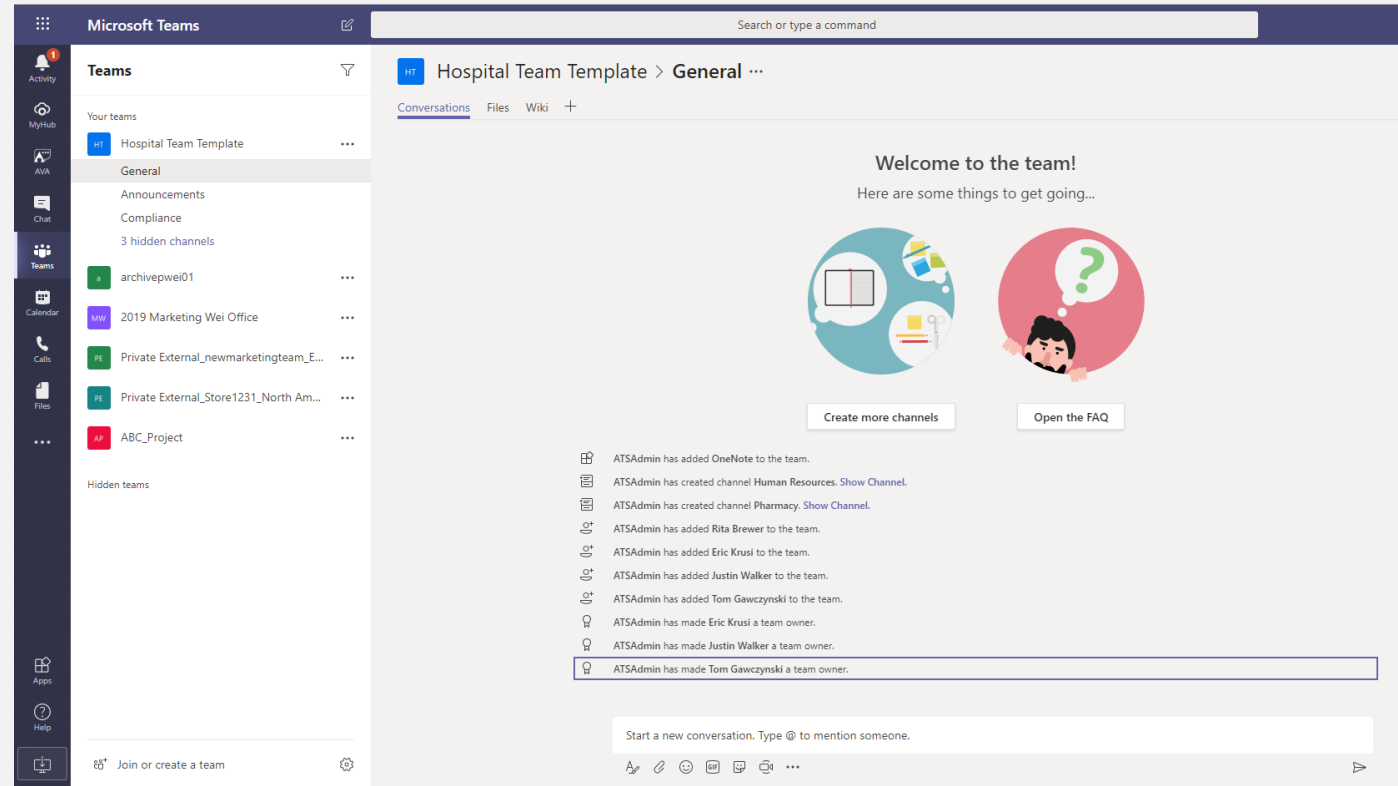
## Bot notification

In the new team we start the project knowing what we are doing and where everything is



# Industry Teams Templates (In Preview)

- Education - Class Team
- Education - Staff Team
- Education - PLC team
- Retail - Store
- Retail - Manager
- Healthcare - Ward
- Healthcare - Hospital



<https://docs.microsoft.com/en-us/microsoftteams/get-started-with-teams-templates>





# Create Your Own Template (In Preview)

- Control Channels
- Set Tabs
- Set Member and Guest Settings
- Deploy Teams Apps
- Set Retention Policies

<https://docs.microsoft.com/en-us/graph/api/teams-template>

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```
POST https://graph.microsoft.com/beta/teams
Content-Type: application/json
{
  "template@odata.bind": "https://graph.microsoft.com/beta/teamsTemplates\('educationClass'\)",
  "displayName": "My Class Team",
  "description": "My Class Team's Description",
  "channels": [
    {
      "displayName": "Class Announcements 📢",
      "isFavoriteByDefault": true
    },
    {
      "displayName": "Homework 📖",
      "isFavoriteByDefault": true
    }
  ],
  "memberSettings": {
    "allowCreateUpdateChannels": false,
    "allowDeleteChannels": false,
    "allowAddRemoveApps": false,
    "allowCreateUpdateRemoveTabs": false,
    "allowCreateUpdateRemoveConnectors": false
  },
  "installedApps": [
    {
      "teamsApp@odata.bind": "https://graph.microsoft.com/v1.0/appCatalogs/teamsApps\('com.m
```

Make it Easy to Do the Right Thing



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



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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[FREE ACCESS](#) ▶

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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

## Implementation

- **Why:** Realise goals in practical terms, accelerate the time to value for technology investments, align with organisational cultural change activities to facilitate business adoption and acceptance
- **How:** Formulate the business and technology means for organising storing and managing information related to information processes, and automate the process to reduce resistance and blockers



# 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*

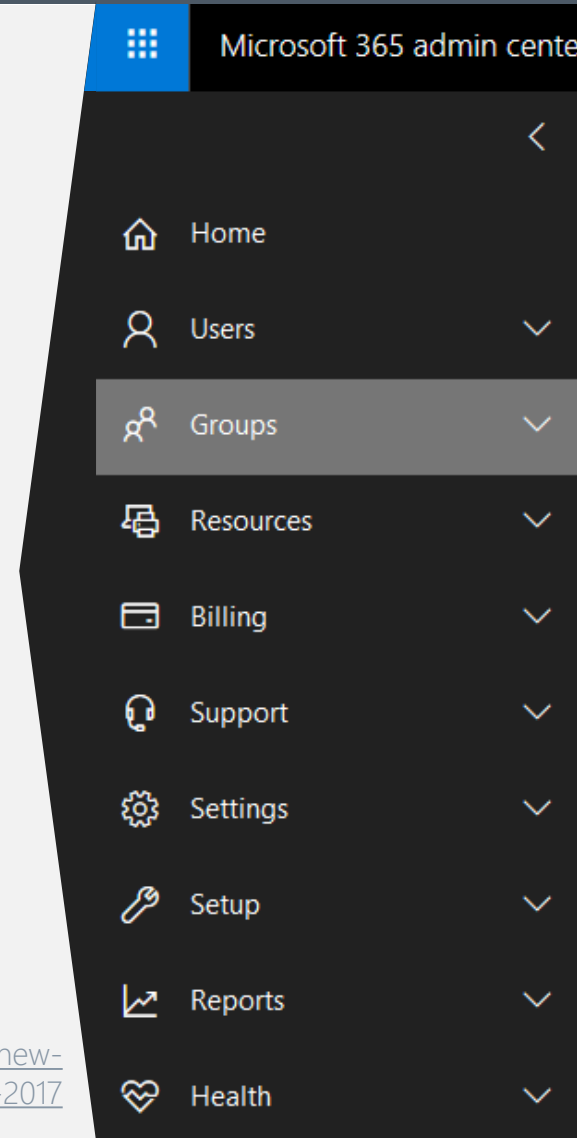


# Native options...

## Provisioning

- **Enable self-service provisioning**
  - There are 17+ endpoints where Office 365 Groups can be provisioned
  - You trust the end user will do the right thing
- **Disable self-service provisioning**
  - Only Office 365 administrators can create Office 365 Groups
  - By doing this, IT can be a bottleneck

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



# Native tooling to help...

Provisioning

## Set group visibility

*Options for public/private, hidden membership/group*

Within the [Create a Group] wizard the privacy setting is available to be set.

BUT...

Does the creator know if it should be Public vs. Private?, and **will they set the privacy correctly** during creation?

Microsoft 365 admin center

John Peluso

Create Discard

### Create a group

A group provides a space for shared conversations, files, and a group calendar.

Choose a name

Add a description

This can help people decide whether to participate.

**Privacy**

Public - Anyone can see what's inside

Language for group-related notifications

English (United States)

☐ Send copies of all group messages and events to members' inboxes. Members can go to the group inside Outlook to access conversations and choose which copies they want to receive in their inbox.

# Native tooling to help...

*Provisioning*

## Restrict self-service

*Creation can be restricted to select users*

The screenshot shows the Microsoft 365 admin center interface. At the top, the user 'Adele Vance' is logged in. The main content area displays the 'Create a group' form. The form includes fields for 'Choose a name', 'Add a description', 'Privacy' (set to 'Public - Anyone can see what's inside'), 'Classification' (set to 'Select a classification'), and 'Language for group-related notifications' (set to 'English (United States)'). A blue banner at the top of the form displays the text: `GroupCreationAllowedGroupId 319c90a7-67ad-4bc4-83a4-759508d5da45`. Two error messages are present: a small white box at the bottom left stating 'Sorry, the ability to create groups has been turned off by the person who manages your email.' with an 'OK' button, and a larger white box in the center stating 'Plan and Office 365 Group Creation Disabled' with the message 'Your organization's global admin has turned off the ability to create new Plans and Office 365 Groups.' and an 'Ok' button.

Documentation: [Manage who can create Office 365 groups](#) | [Populate groups dynamically based on object attributes](#)



# Native tooling to help...

*Provisioning*

## Naming conventions

*Prefix/Suffix, blocked words*

1. Now you can set the prefixes and suffixes. Run the following command:

```
$Setting["PrefixSuffixNamingRequirement"] = "Grp_[Department]"
```

2. Now set the custom blocked words that you want to restrict by typing the following command:

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

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

```
Set-AzureADDirectorySetting -Id (Get-AzureADDirectorySetting | Where-Object {$_.DisplayName -Value "Group.Unified" -EQ}).id -DirectorySettingValue "Grp_[Department]"
```

That's it. You've set your naming policy and added your blocked words.

### 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

Add Microsoft Teams to an existing Office 365 group?

Looks like you're an admin of a group. You can add Microsoft Teams functionality without changing the existing group. Yes, add Microsoft Teams functionality

Documentation: [Office 365 Groups Naming Policy](#)

Cancel

Next

# 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

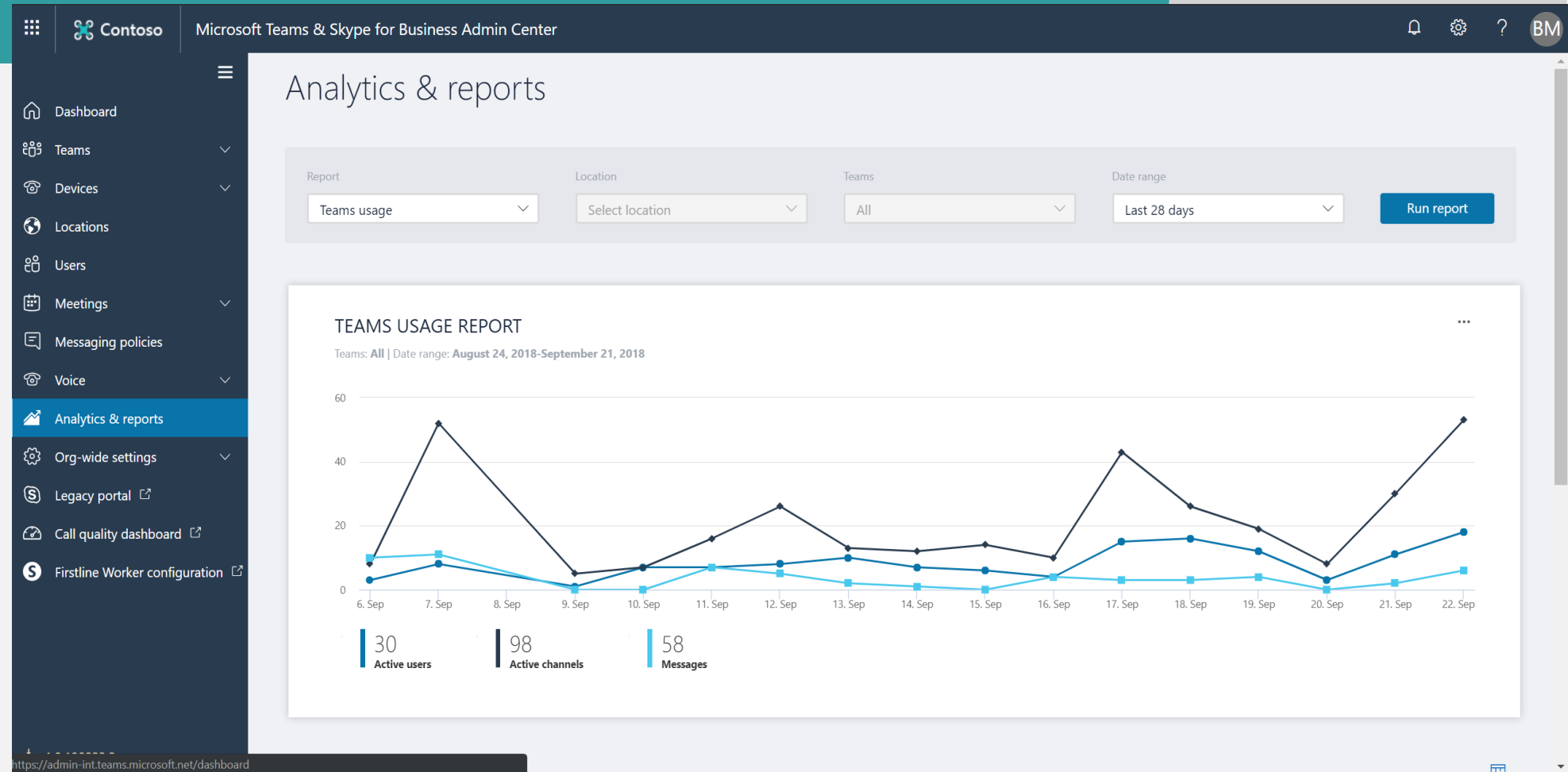


# Native tooling to help...

Management

## Teams Admin Center

Monitor Teams usage, set policies and settings



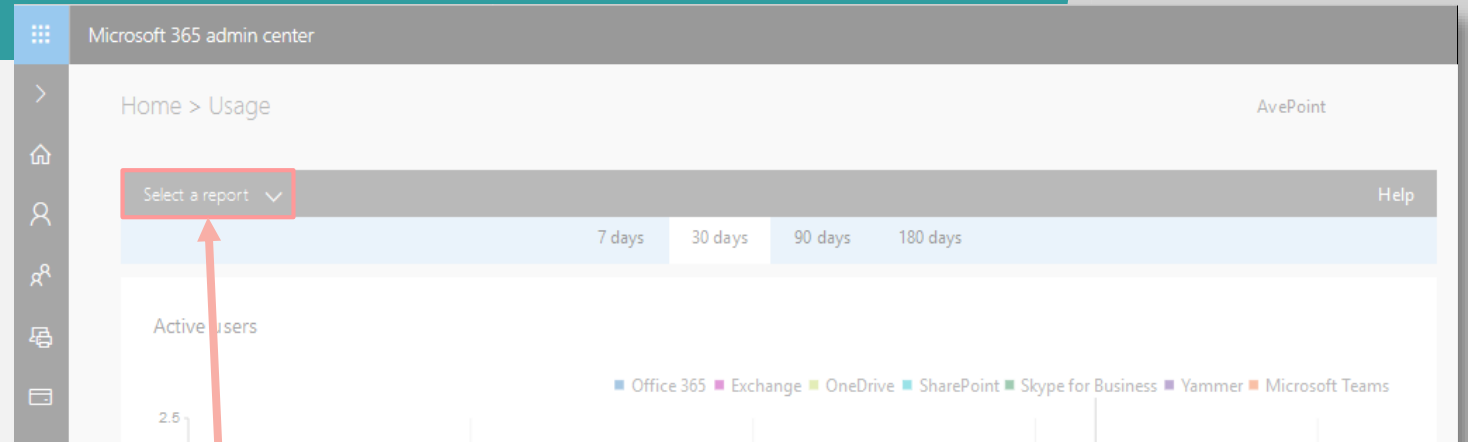
# Native tooling to help...

Management

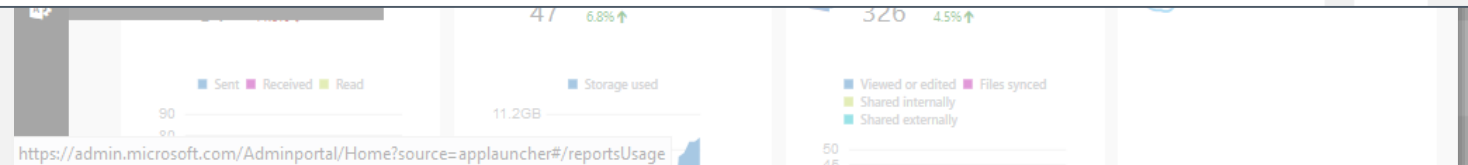
## Activity/Usage Reporting

*Report on Yammer/Teams Activity*

Monitoring of adoption can be tracked from the activity reports section of the admin centre.



Details							Export
Username	Last activity date (UTC)	Channel messages	Chat messages	Calls	Meetings		
an@avepoint.com	10 December 2018	0	2	0	0		
an@avepoint.com	30 December 2018	2	0	0	0		
an@avepoint.com		0	0	0	0		
an@avepoint.com	10 December 2018	0	0	0	0		



<https://docs.microsoft.com/en-us/office365/admin/activity-reports/microsoft-teams-user-activity>

# Native tooling to help...

Management

## Audit reporting

*Audit changes in your tenant*

Access to the audit logs can be given to non-admins ✓

BUT...

- Limited audit content available for Teams
- 90-day logs for E3
- 365-day logs for E5

[https://docs.](https://docs.microsoft.com/en-us/office365/enterprise/audit-log-search)

Office 365 Security & Compliance

Home > Audit log search

### Audit log search

Need to find out if a user deleted a document or if an admin reset someone's password? Search the Office 365 audit log to find out what the users and admins in your organization have done. [Learn more about searching the audit log](#)

**Search** [Clear](#)

Activities

Created team, ... (19)

**Start date**

2019-03-15 00:00

**End date**

2019-04-25 00:00

Users

Show results for all users

File, folder, or site ⓘ

Add all or part of a file name, folder name, or URL.

**Search**

**+ New alert policy**

**Results** 53 results found

Date ▼	IP address	User	Activity
2019-04-23 11:29:40		admin@...	Changed team setting
2019-04-23 11:29:29		admin@...	Changed team setting
2019-04-23 11:29:10		admin@...	Updated tab
2019-04-23 11:27:23		admin@...	Changed team setting
2019-04-23 11:26:54		admin@...	User signed in to Teams
2019-04-16 18:10:39		admin@...	User signed in to Teams
2019-04-11 21:45:41		admin@...	User signed in to Teams
2019-04-11 21:30:01		AlexW@...	User signed in to Teams
2019-04-11 21:30:00		AlexW@...	Added members to team
2019-04-11 21:29:42		AlexW@...	Created team
2019-04-11 21:29:41		AlexW@...	Added members to team

# Native tooling to help...

Management

## Dynamic Membership

*Set group membership by AD attribute*

Groups can be created using variables from Active Directory accounts.

BUT...

This requires a **continually clean Active Directory**.

Azure Active Directory admin center

Home > contoso > Groups - All groups > Group > Dynamic membership rules

Group

\* 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

Dynamic membership rules

Add dynamic membership rule  
Simple rule Advanced rule

Add users where  
department

Equals

Cool People

Dynamic membership rules

Add dynamic membership rule  
Simple rule Advanced rule

Advanced rule ⓘ  
(user.department -eq "Cool People")

# Native tooling to help...

*Management*

## Supervision

Use supervision policies to capture employee communications for examination by internal or external reviewers.

- Exchange Online mailboxes
- SharePoint Online sites and OneDrive for Business accounts
- Microsoft Teams

Office 365 Security & Compliance

Supervision > Review

X1050 Teams

Home Review Resolved items

Resolve

>	Subject	Sender	Date
✓	drinking maste...	Alex Wilber <...>	4/11/2019, 9:20:...
✕		Alex Wilber <...>	4/11/2019, 9:18:...

drinking master card 5555555555555555

File metadata

Native View

**From:** Alex Wilber <AlexW@M365x053534.OnMicrosoft.com>  
**Sent on:** Friday, April 12, 2019 2:20:06 AM  
**To:** Adele Vance <AdeleV@M365x053534.OnMicrosoft.com>  
**Subject:** drinking master card 5555555555554444

drinking

Review

Tag as

- ☐ Compliant
- ☐ Non-compliant
- ☐ Questionable

Comment

Put your justification here...

Save

1 item(s) loaded.

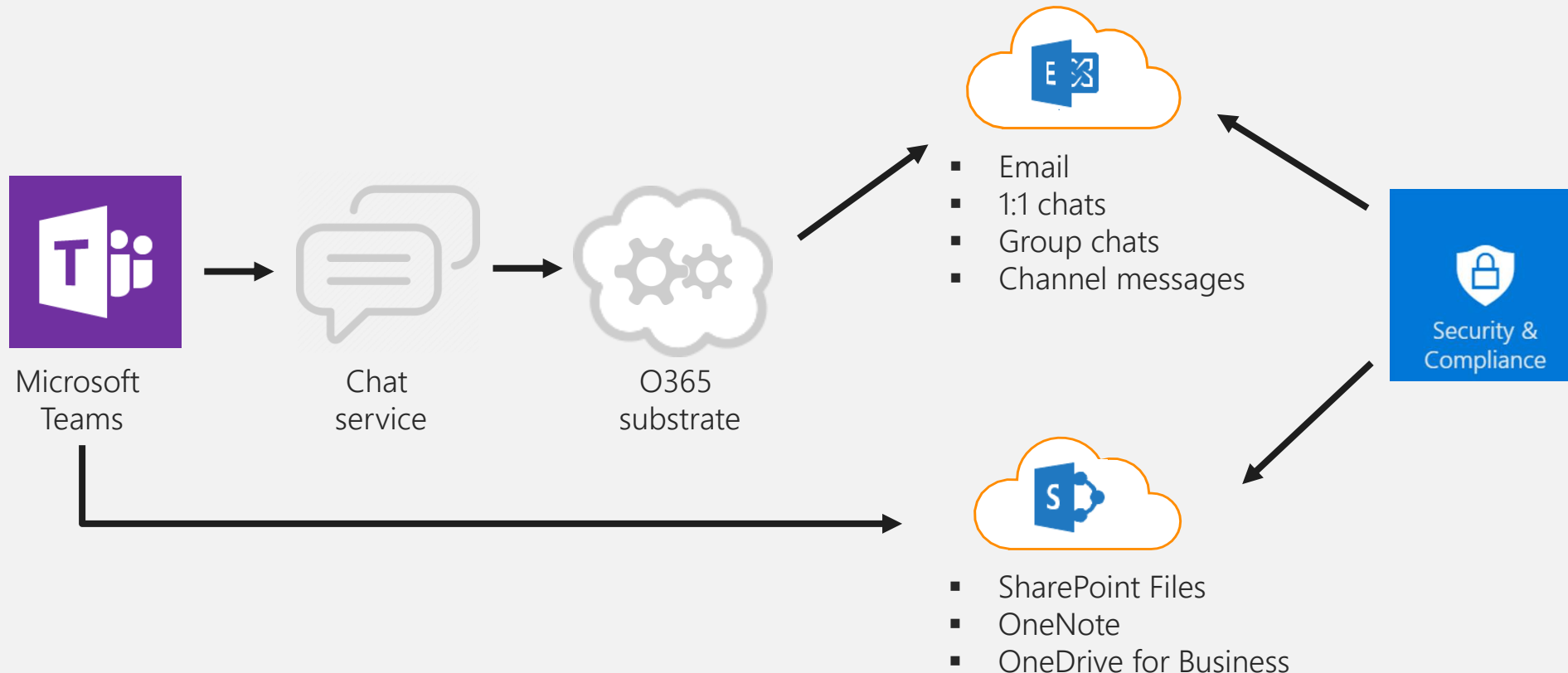
Close

Feedback

# Native tooling to help...

*Information Lifecycle*

## How to Enable Information Protection



**Office 365 Information Protection tools**

- eDiscovery
- Legal Hold
- Compliance content search
- Archive
- Retention
- Audit Logs



# Native tooling to help...

*Information Lifecycle*

## Group Expiration

*Set a default Group expiration time*

It is possible to expire groups from the Azure admin panel.

BUT...

**AD Premium licenses** are required for all members of these groups.

Azure Active Directory admin center contoso > Users and groups >

### Expiration

Search (Ctrl+/)

Save Discard

**MANAGE**

- General
- Expiration (preview)

**Renewal notifications** are sent via email to group owners 30 days, 15 days and 1 day prior to group expiration. Failure to renew will result in the deletion of the Office 365 group and its content from Teams, Planner, Yammer, Sharepoint, Outlook, etc. If group owners do not have Exchange Licenses, DO NOT enable this feature.

Group lifetime (in days) Custom 31

Notify group owners with no owners, notify Admin@odemo.me

Select Office 365 groups for these Office 365 groups All Selected None

Select	Office 365 groups	
<input type="checkbox"/>	Alex Dept Planning	...
<input type="checkbox"/>	Alex Team YamJam	...
<input type="checkbox"/>	test	...

Action Required: Renew your Office 365 group

msonlineserviceteam@microsoftonline.com Yesterday, 3:20 PM MOD Administrator

Your Office 365 group 'test' expires in 30 day(s)

test

Renew group Go to group

If you don't renew, the group and its related content from Teams, Planner, Yammer, Sharepoint, Outlook, etc. will be deleted on 9/10/2017

Microsoft Corporation, One Microsoft Way, Redmond WA, 98052 | Privacy Statement

# Native tooling to help...

*Information Lifecycle*

## Retention

*Set retention policies*

Retention policies  
at the "Container"  
level

And...

Retention Labels at  
the folder or item  
level

The screenshot displays the Office 365 Security & Compliance center. On the left, a navigation pane shows 'Home', 'Alerts', and 'Permissions'. The main area is titled 'Create a label to help users classify their content.' and includes a 'Name your label' button (with a green checkmark) and a 'Label settings' button (with a grey circle). Below this, a 'Documents' table lists various files and folders. The 'Test Doc.rtf' file is selected, and a context menu is open, showing the 'Apply label' option. The 'Apply label' dropdown menu is open, showing options: 'None' (Clear the label), 'High Business Impact (HBI)' (Retain for 7 years), 'Low Business Impact (LBI)' (Delete after 2 years), 'Medium Business Impact (MBI)' (Retain for 3 years), 'My New Label', and 'Test Label 2' (Retain for 22 years). A hand cursor is pointing at the 'High Business Impact (HBI)' option. In the background, the 'Label settings' panel is visible, showing the 'Retention' toggle is 'On' and a dropdown menu for 'When this label is applied to content...' is open, showing options like 'when it was created'.

Name	Modified	Modified By	Sign-off status
General	September 25, 2017	MOD Administrator	
HBI Stuff	September 11	MOD Administrator	
My Other Channel	September 25, 2017	MOD Administrator	
2018-01-24_17-11-17.png	April 16	MOD Administrator	
Test Doc.rtf	August 23, 2017	Adele Vance	

# Native tooling to help...

*Information Lifecycle*

## Archiving

Archive a team when it's no longer active, but you want to keep it around for reference or to reactivate in the future.

### Manage teams

Create a team

Search teams



#### Active (8)

Name	Description	Membership	People	Type
Business Development	Business Development	Member	22	
Contoso #02	Contoso #02	Member	7	
DG-2000 Product Team	Welcome to the DG-2000 Product Team.	Member	9	
Mark 8 Project Team	Mark 8 Project Team	Member	23	
New York #03	New York #03	Member	2	
Sales				
Texas 2 Step				
X1050 Launch				

### Want to archive "Texas 2 Step"?

This will freeze all team activity, but you'll still be able to add or remove members and update roles. Go to Manage teams to restore the team. [Learn more.](#)

☐ Make the SharePoint site read-only for team members

Cancel

Archive

Delete the team

# Native tooling to help...

*Information Lifecycle*

## Content Search in Office 365

Search for in-place items such as email, documents, and instant messaging conversations in your Office 365 organization.

- Exchange Online mailboxes and public folders
- SharePoint Online sites and OneDrive for Business accounts
- Skype for Business conversations
- Microsoft Teams
- Office 365 Groups

The screenshot displays the Office 365 Security & Compliance Center interface. The top navigation bar shows 'Office 365 Security & Compliance' and 'Content search > Search : Mark'. The left sidebar has tabs for 'Searches' and 'Exports'. The main content area shows a search query 'Mark' with a list of results. The first result is 'Contoso Mark 8' with a date of 2017-12-28 13:24:32 and sender/author Brad McCabe:Megan Bowen. The second result is 'Building the Contoso Mark 8' with a date of 2018-02-15 15:28:55 and sender/author Sonia Dara:Megan Bowen. The third result is 'Building the Contoso Mark 8' with a date of 2018-05-17 17:34:06 and sender/author Sonia Dara:Megan Bowen. The fourth result is 'Building the Contoso Mark 8' with a date of 2018-05-17 17:30:38 and sender/author Sonia Dara:Megan Bowen. The right sidebar shows a preview of the document 'Building the Contoso Mark 8' with the title 'Building the Contoso Mark 8' and the subtitle 'Quadcopter and state of the art'. The bottom of the interface shows 'Results per page: 50 | 100 | 500' and a page number '1 of 1 Pages'.

Office 365 Security & Compliance

Content search > Search : Mark

Searches Exports

Back to saved searches

+ New search | Save | Open... | More

Sort: Type | Individual results

Search query

Keywords

Mark

Show keyword list

+ Add conditions

Locations: selected locations(selected)

All locations

Specific locations

Status: completed

Save & run | Status details

Showing 1-31 out of total 31 estimated indexed result(s) (73.79 MB)

Date: 2017-12-28 13:24:32 | Sender/Author: Brad McCabe:Megan Bowen

Type: pptx

Contoso Mark 8

Date: 2017-10-04 17:42:49 | Sender/Author: Brad McCabe:Megan Bowen

Type: pptx

Building the Contoso Mark 8

Date: 2018-02-15 15:28:55 | Sender/Author: Sonia Dara:Megan Bowen

Type: pptx

Building the Contoso Mark 8

Date: 2018-05-17 17:34:06 | Sender/Author: Sonia Dara:Megan Bowen

Type: pptx

Building the Contoso Mark 8

Date: 2018-05-17 17:30:38 | Sender/Author: Sonia Dara:Megan Bowen

Results per page: 50 | 100 | 500

1 of 1 Pages

Author: Sonia Dara

Title: Creating Ideas from Nature

Download Original Item

Building the

Quadcopter and state of the art

Feedback

# Native tooling to help...

*Information Lifecycle*

## DLP

Use data loss prevention (DLP) policies to help identify and protect your organization's sensitive info.

- Exchange Online mailboxes
- SharePoint Online sites and OneDrive for Business accounts
- Microsoft Teams

The screenshot displays the Microsoft 365 interface. At the top, the 'Data loss prevention' page is visible, showing a policy for 'U.S. Financial Data' with 'DLP policy matches' and 'DLP false positives and over...' counts, both at 0. Below this, a Microsoft Teams chat window for 'X1050 Launch Team' is open, showing a conversation with 'Irvin Sayers'. A message from Irvin Sayers is flagged with a red icon and text: 'This message was flagged because it contains sensitive data'. The message content is partially visible: 'the customer SSN: 358-45' and 'use CC Mastercard 55555'. A modal dialog box is overlaid on the chat, titled 'Your message was flagged because it contains sensitive data'. It lists the sensitive data types: 'Credit Card Number' and 'EU Debit Card Number'. It states: 'This item is protected by a policy in your organization. Here's what you can do'. It provides instructions: 'If you think the message was flagged in error, report it to your admin. Reporting won't unflag the message.' At the bottom of the dialog are 'Cancel' and 'Report' buttons.

Home > Data loss prevention

Use data loss prevention (DLP) policies to help identify and protect your organization's sensitive info. For example you can set up policies to help make sure info

DLP policy matches 0

DLP false positives and ov... 0

U.S. Financial Data

Edit policy Delete policy

Status On

X1050 Launch Team > General ...

Conversations Files +

Reply

This message has been deleted

Reply

Irvin Sayers 5:43 PM

the customer SSN: 358-45

Reply

Irvin Sayers 5:43 PM

This message was flagged because it contains sensitive data

use CC Mastercard 55555

Reply

Your message was flagged because it contains sensitive data

- Credit Card Number
- EU Debit Card Number

This item is protected by a policy in your organization.

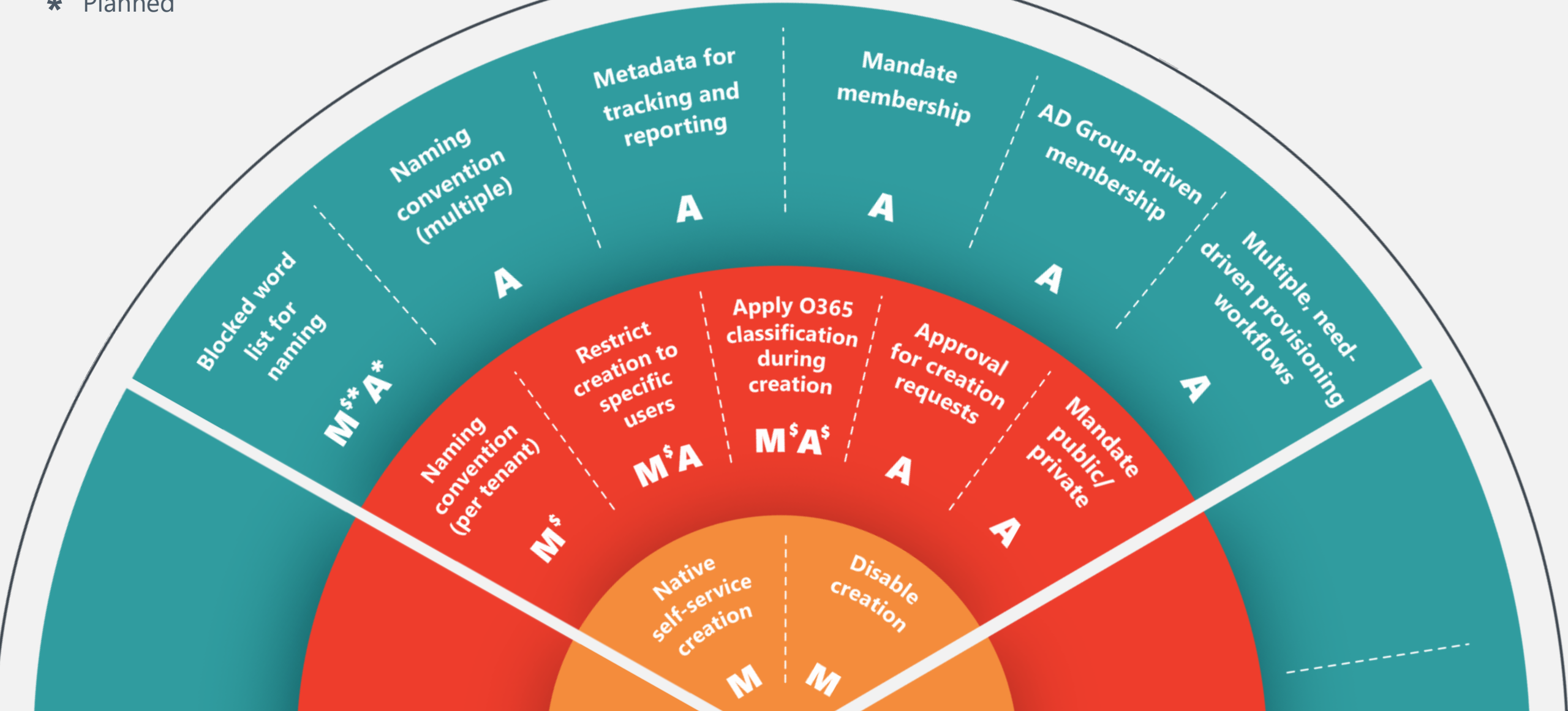
Here's what you can do

If you think the message was flagged in error, report it to your admin. Reporting won't unflag the message.

Cancel Report

- M** Office 365 Feature
- A** AvePoint Feature
- \$** Requires AAD Premium
- \*** Planned

## PROVISIONING



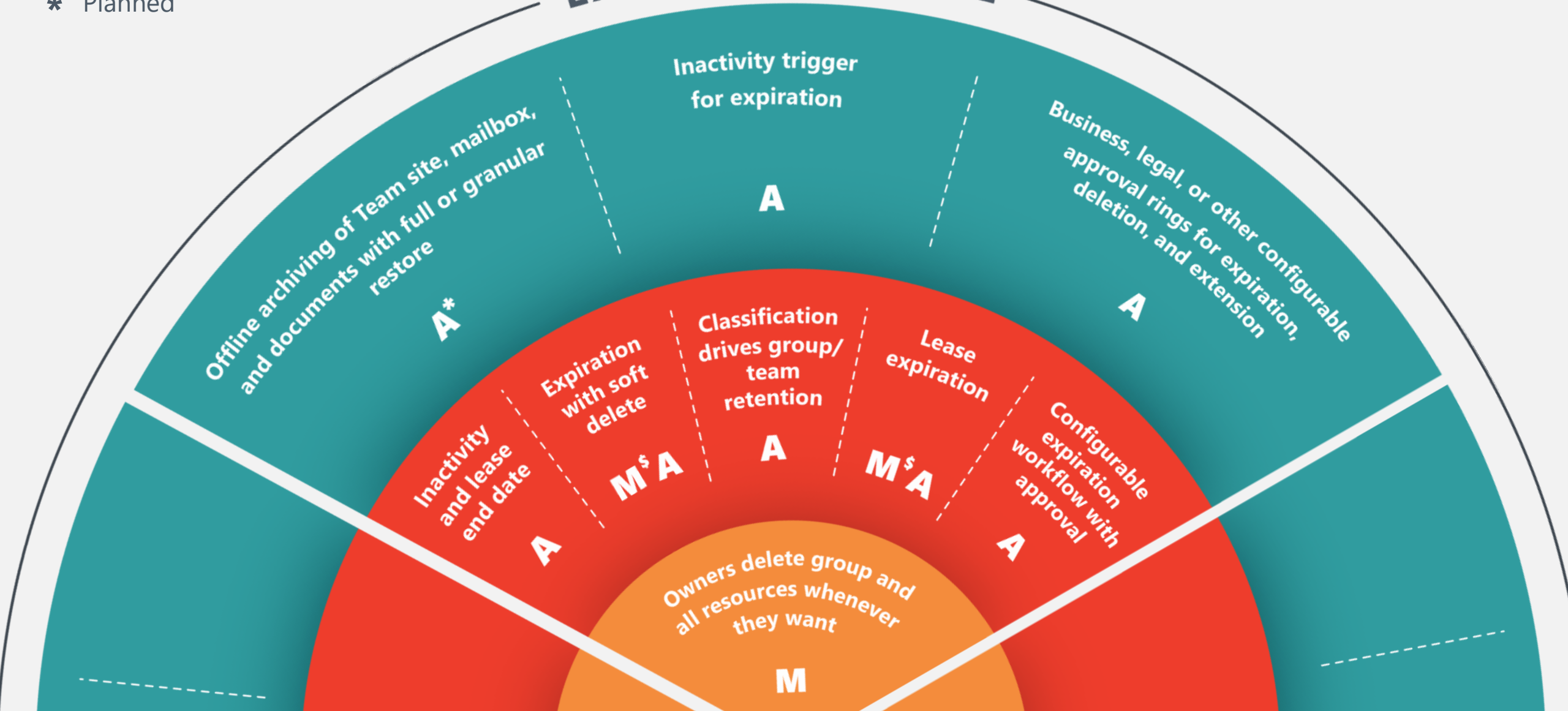


- M** Office 365 Feature
- A** AvePoint Feature
- \$** Requires AAD Premium
- \*** Planned



- M** Office 365 Feature
- A** AvePoint Feature
- \$** Requires AAD Premium
- \*** Planned

## EXPIRATION & EOL





Demo

# AvePoint MyHub Teams App

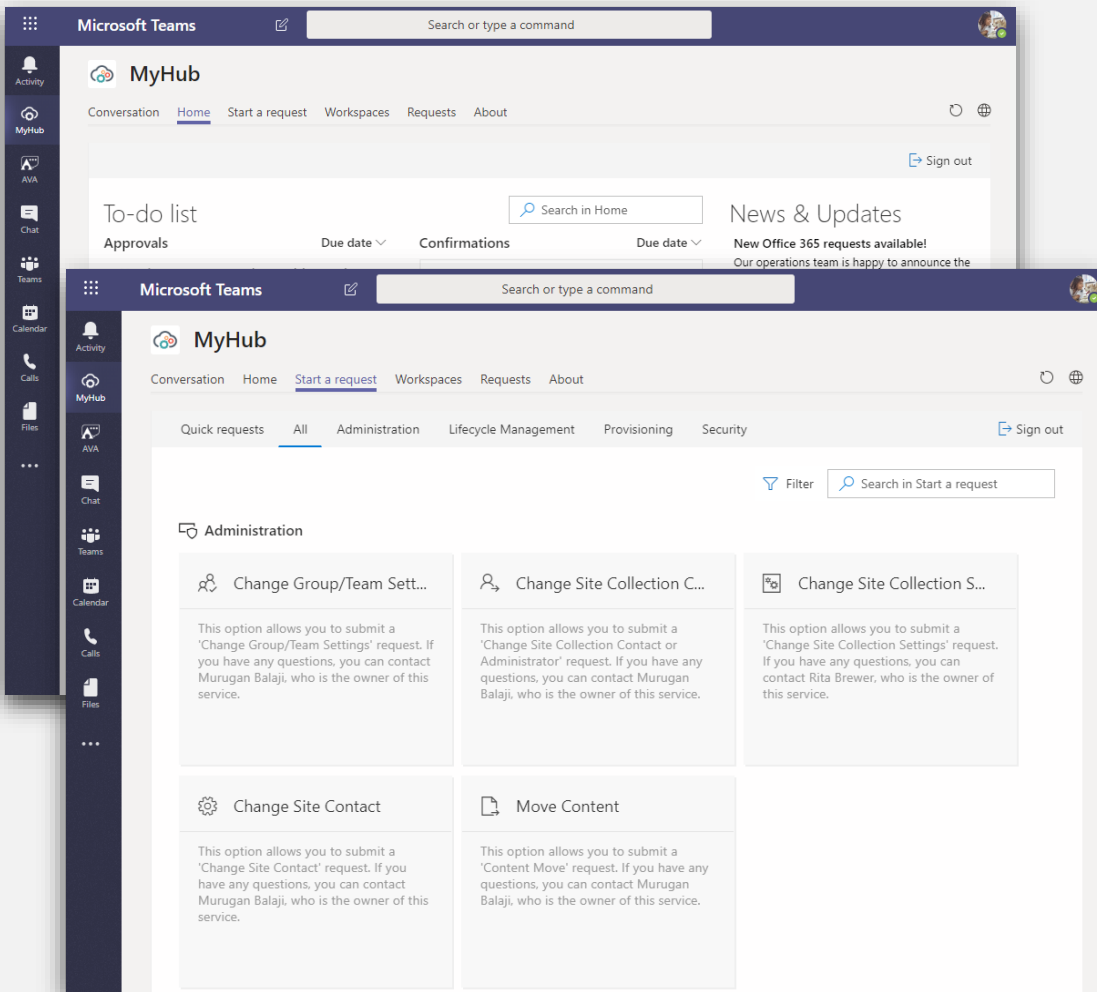
Easily find the right tools for whatever you need and get them faster:

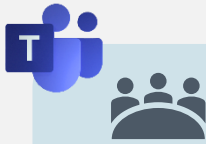
A simplified catalog of Office 365 services tailored to you

Answer basic questions to be guided to the right services

Governance is built into each request and service – there are no extra steps!

Request, approve, renew and more without ever leaving Teams!





**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

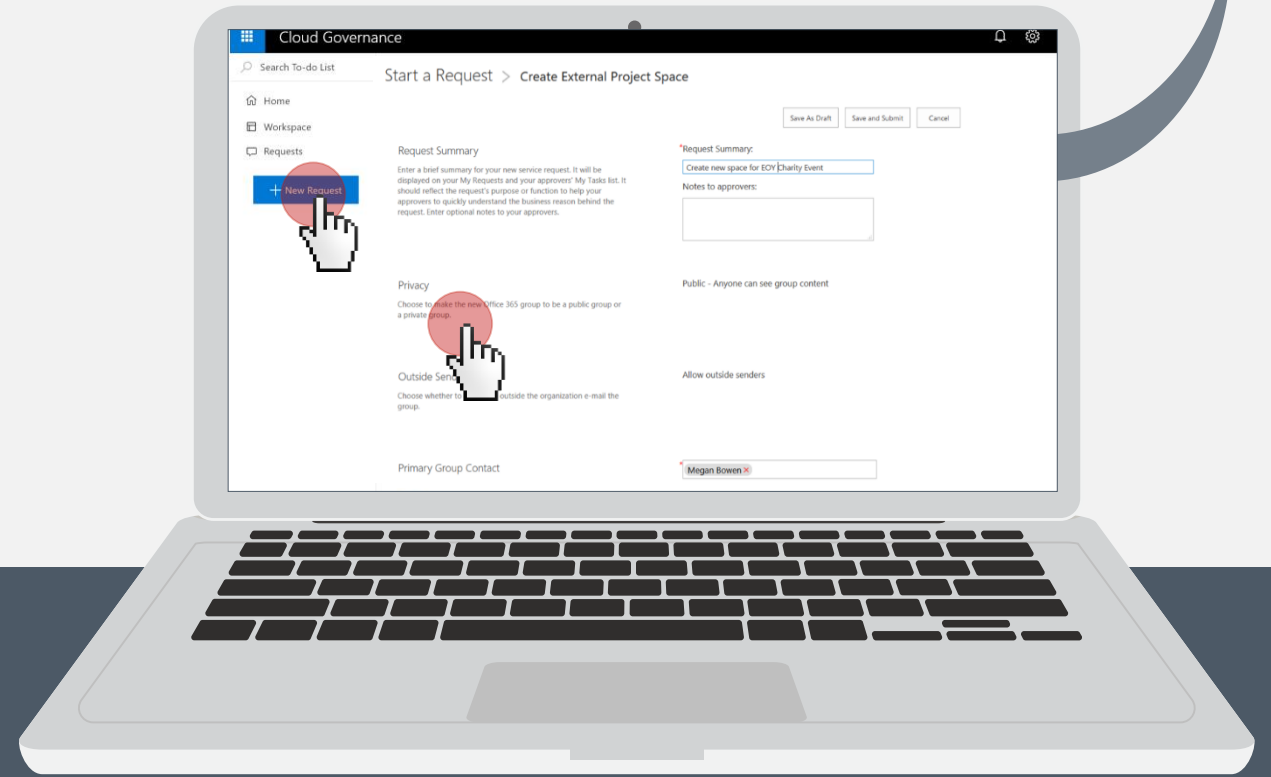
**Backup:** All  
**External Users:** Yes  
**Recert:** 6 Months  
**Reporting:** Annual  
 +  
**Default Labels**  
**Metadata Presets**



**EOY Charity Event**

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

LABELLED  
TAGGED



# Bringing It Together

# Drive Sustainable Adoption



Change is  
often met with  
resistance

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





# 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](#)

# Why Training Alone Doesn't Work



Non-Contextual

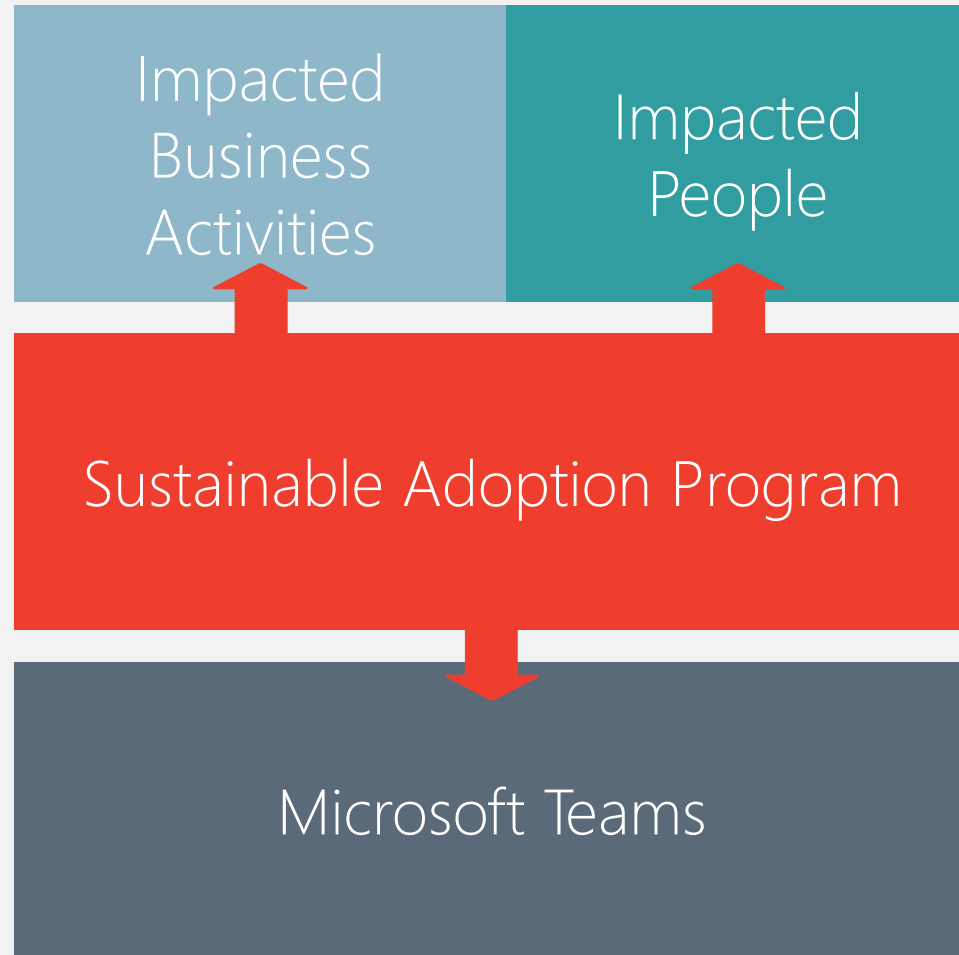
Unclear Roles

Generational Gap

What's In It For Me?



# Sustainable Adoption Objectives

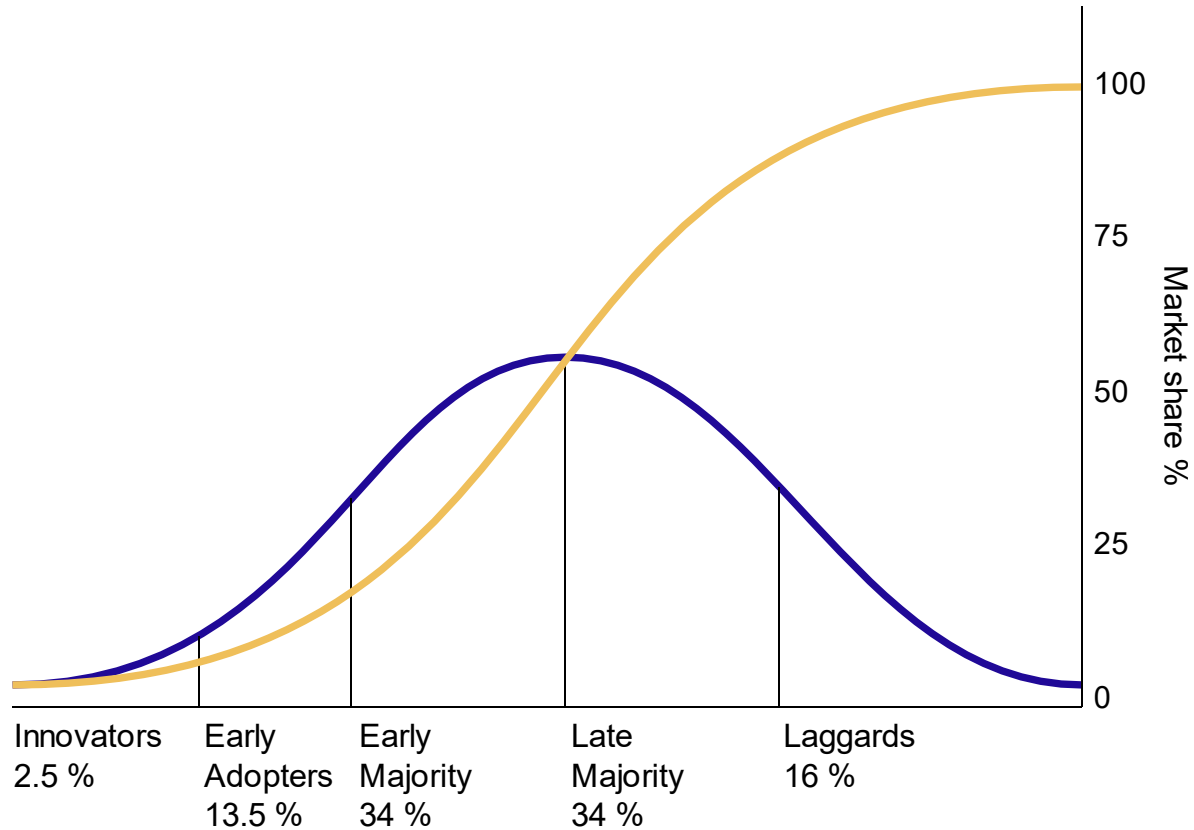


- Minimize the negative impact of making technology changes
- Promote the consistent adoption of Microsoft Teams
- Provide users with the resources they need to be successful





# How do you create a sustainable adoption plan?



\* [Diffusion of Innovations](#) by Everett Rogers



# 5 Steps To Success

---



# Step 1: Engage Key Stakeholders

Business leadership

Champions

Early Adopters

IT Support



# Gain Business Leadership Buy-In

Executive  
Leadership



Divisional  
Heads



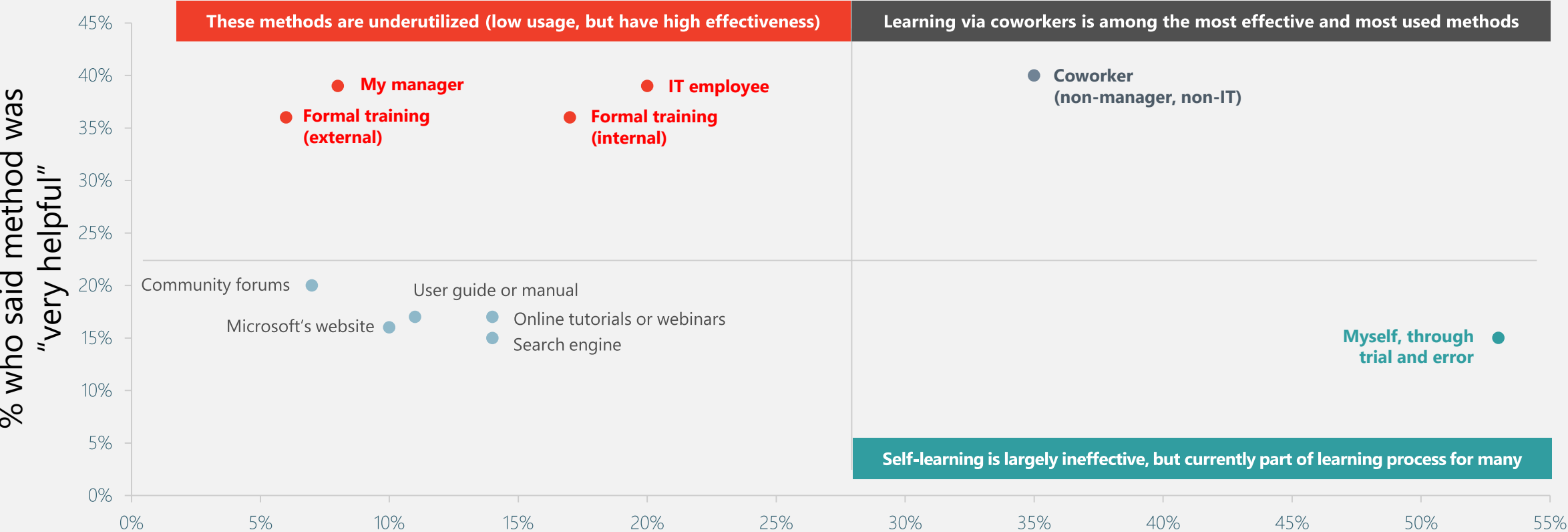
# Who are **champions**?

- Champions evangelize and help train their teams on the new ways of working.
- They build awareness, understanding, and engagement throughout the community.



# Why are champions important?

Learning via coworkers is among the most effective and most used methods.







## Who are **early adopters**?

- The first to embrace new technology and try out new practices
- Opinion leaders

# 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.*



# Step 2: Establish Use Cases

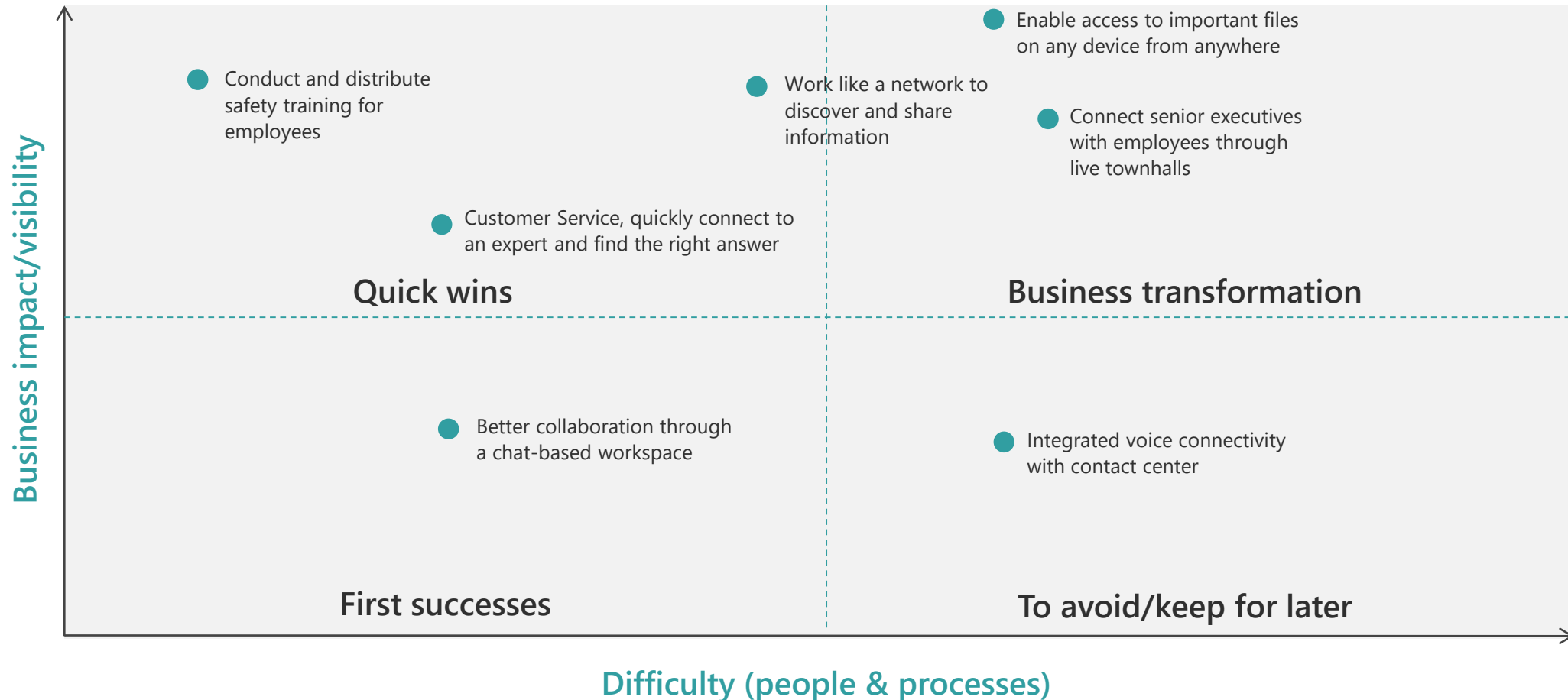
A group of people in a meeting. In the foreground, a woman with brown hair is looking down at a laptop. Next to her, a man is drinking from a cup. In the background, another man is standing and speaking. The setting appears to be a modern office or library with bookshelves.

Identify specific use cases

Prioritize scenarios

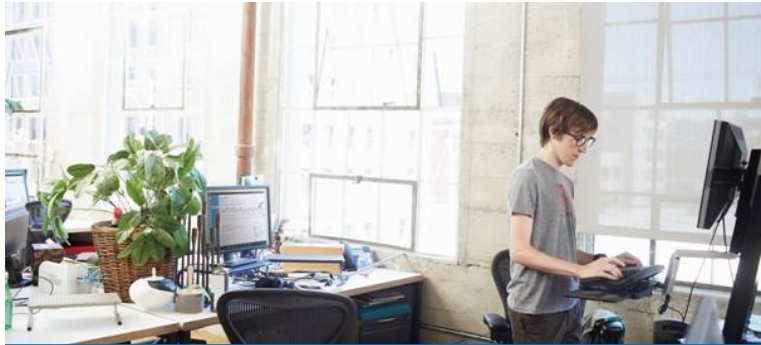
Communicate value

# Prioritize use case scenarios by **evaluating impact and difficulty**



# Example: Business Scenarios

## Engineering, Research & Development



Share best practices across geographies

## Operations, Manufacturing & Logistics



Improve and monitor business processes

## Sales, Marketing, PR & Communications



Align Sales and Marketing teams

## HR & Legal Services



Gather & process forms from employees

## Accounting, Finance & Procurement



Pull data and build financial reports

## Administration



Organize teams and manage calendars



# Step 3: Develop Contextual Learning



Use case driven

Multiple modalities

Align to various phases

# Build your training strategy

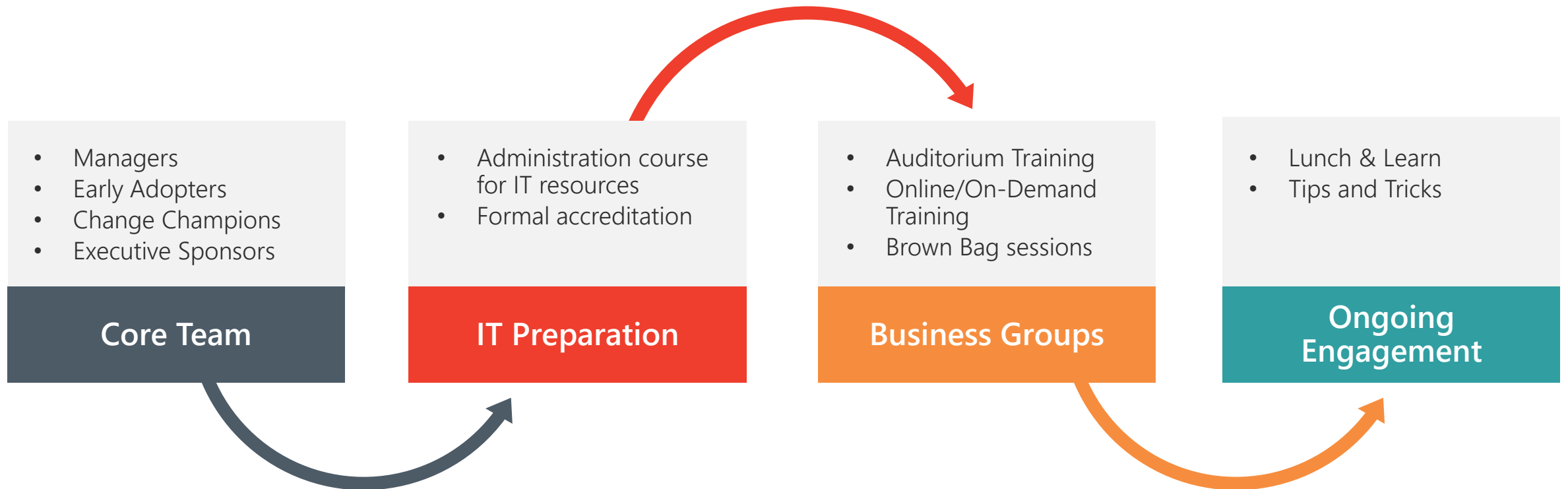
- Focus on the why
- Use real work scenarios
- Use multiple formats
- Reinforce
- What is best practice?
  - What is current vs future state?
  - Technical literacy of employees?
  - Any other change programs?
  - Training preferences of employees?



# 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.

# 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



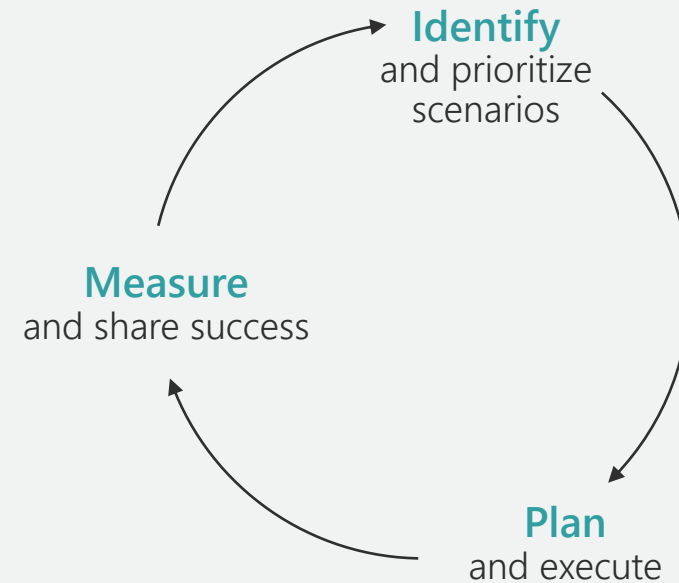
# Communicate value to stakeholders with scenarios

## 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





 This email template is designed for you to send to your organization on the morning of your Microsoft Teams rollout. Please customize the areas shown in orange below.

 Chat-based workspace

## Announcing Microsoft Teams


Microsoft Teams is here!

Microsoft Teams is the new tool from Microsoft that brings together information that teams need to work effectively and perform at their peak. This chat-based workspace combines chat, documents, people and tools in one secure place.

Microsoft Teams helps you and the people you work with to:

- Communicate in the moment and keep everyone in the know
- Gain easy access to information you need right in Office 365
- Customize the workspace with the specific content and capabilities you need
- Collaborate with the freedom and confidence of Office 365 security

Microsoft Teams will help you work smarter, wherever you are, and on any device!

 This poster is designed to post in hallways and public spaces during your Microsoft Teams rollout. Make sure to customize the areas shown in orange below and print the poster on 11x17 paper.

## chat-based workspace

Microsoft Teams brings chat, content, people and tools together, all in one hub, wherever you are.


Chat for today's team


A hub for teamwork

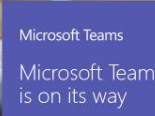
Customized for each team

Learn what you can do with Microsoft Teams

<b>Training</b> Visit the Office 365 Learning Center at <a href="https://support.office.com">https://support.office.com</a> <small>*All available, add links to your organization's internal training resources.*</small>	<b>Community</b> Visit the Microsoft Teams Tech Community at <a href="https://techcommunity.microsoft.com">https://techcommunity.microsoft.com</a> <small>*Add links to your Office 365 community or Yammer groups.*</small>	<b>Events</b> <small>*Tell people about your upcoming Microsoft Teams events. For example, "Join our weekly lunch and learn every Monday at noon in the cafeteria!"</small>
---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------


 Your logo here

 This email template is designed for you to send to your organization on the morning of your Microsoft Teams rollout. Please customize the areas shown in orange below.

 Microsoft Teams is on its way

## The new way for teams to work

On <fill in date> we're rolling out Microsoft Teams, the chat-based collaboration workspace in Office 365. Give teams instant access to everything they need in a dedicated hub for teamwork where chat, content, people and tools live together in Office 365.

[Watch the video](#) 

# Customer Success Kit

<https://www.microsoft.com/en-us/download/details.aspx?id=54244>





# 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.





# Consider priority audiences

Work Force Analysis Persona review may show a natural prioritization

- Sales
- Customer Service
- Finance and Support Teams
- IT

Other Audiences could also drive the change quicker (e.g. Adoption Core Team)

- Sponsors
- Managers
- Ambassadors
- Change Champions

Support Organizations are essential and may need differing communications

- IT operations
- HR

# Ensure Scalable Support



# Step 5: Deliver 90 Day Plan

A photograph of a man and a woman in business attire sitting at a table in a meeting room. The man, who is older with grey hair, is wearing a dark suit, a light blue shirt, and a striped tie. He is gesturing with his hands while speaking. The woman, with long dark hair, is wearing a light blue blazer and is looking towards the man. In the background, there are blurred office elements like a wall-mounted screen and another person.

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







## Month 1: Key Activities

Get stakeholder consensus

Identify low hanging fruits

Conduct proof of concept



## Month 2: Key Activities

Launch Teams pilot across  
3 departments/groups

Establish help desk /  
support strategy +  
resources

Identify success metrics





## Month 3: Key Activities

Launch organization wide

Ensure leadership is engaged

Showcase wins

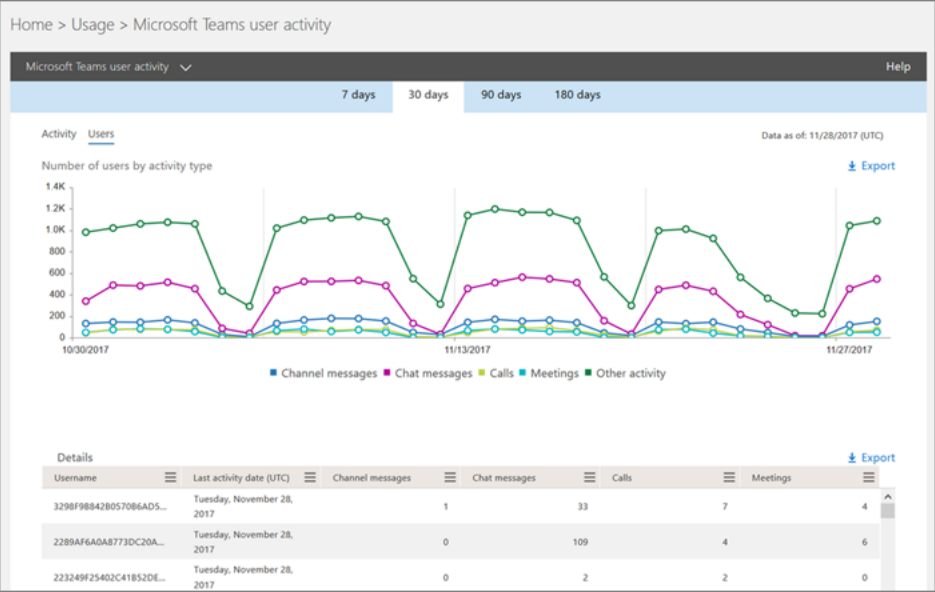




# Measure Success

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

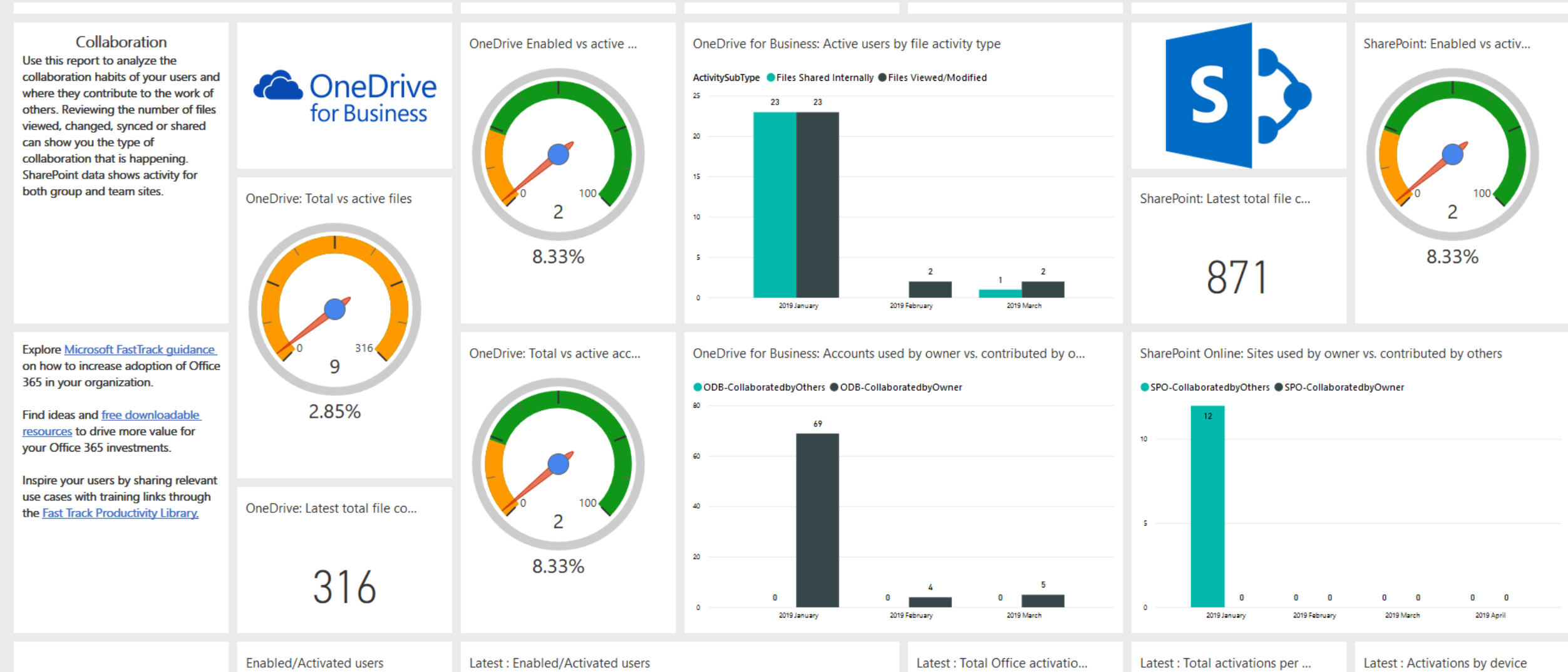
Business Use Case	How did Microsoft Teams help?	What was achieved?	How is it measured?
Team Collaboration	Streamlined collaboration across regional teams to execute go-to-market strategy.	Increasing global spread of business.	15% improvement in increasing number of successful innovations for new products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



Demo

# Measure Success – Adoption Pack

Ask a question about your data



# What We Covered

- The New Culture of Teamwork
- Teams Customization / Extension
- Enable Business Solutions
- Teams Governance
- Drive Sustainable Adoption



# How We Can Help You

## 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

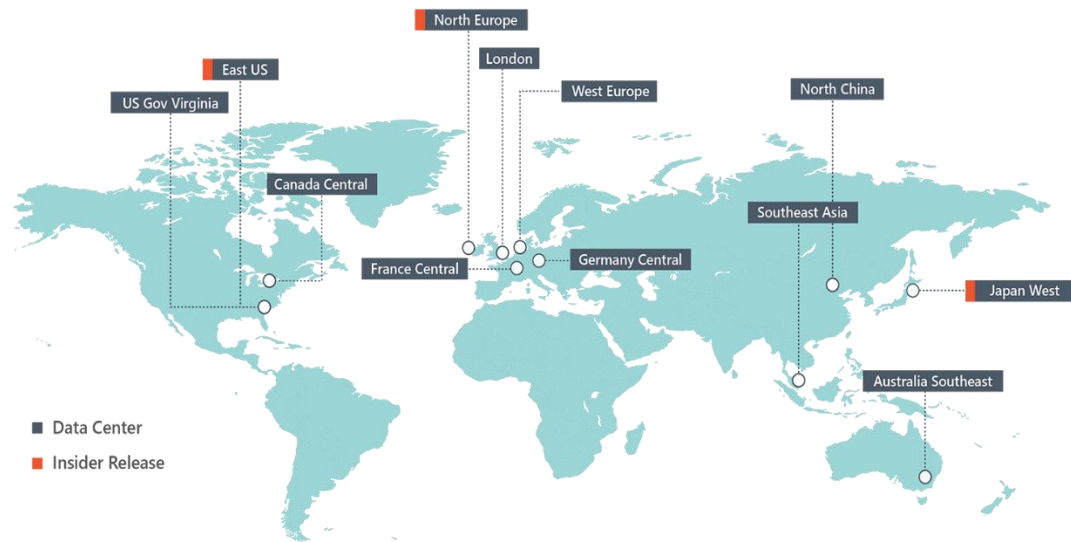
Provide a detailed analysis of the current state and the tools and techniques to implement IT governance. Map key business units to our analysis of IA, O365 tools, and governance recommendations. Execute a Governance Pilot/POC using O365 and AOS.

- 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)



# About AvePoint

- Migrate. Manage. Protect.



12 Global Cloud Instances

99.5% Availability Backed by Azure

24/7 World-Class Support

20PB+ Managed Customer Data

ISO Certification



27001:2013



16K  
Customers

6M  
Cloud Users

88  
Countries

7  
Continents

**AvePoint** is headquartered and maintains its principal operational center in Jersey City, NJ, with approximately 1,500 employees across five continents.

Microsoft  
Partner



2017 Partner of the Year Winner  
Public Sector: Microsoft CityNext Award

2016 Partner of the Year Winner  
Technology for Good Citizenship Award


2015 Partner of the Year Winner  
Collaboration and Content

2014 Partner of the Year Winner  
Public Sector: Public Safety and National Security



Let's  
Connect



Funtrol Ready  
[Linkedin.com/in/funtrolr](https://www.linkedin.com/in/funtrolr)  
[funtrol.ready@avepoint.com](mailto:funtrol.ready@avepoint.com)  
 [@funsterD](https://twitter.com/funsterD)

# 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

ໂພນລຸ້ນລຽ້ນ

Dziękuję

谢谢

Tack

Mulțumesc

спасибо

Merci

תודה

多謝晒

дядкую

Ďakujem



Sales@AvePoint.com | +1 800.661.6588



[www.AvePoint.com](http://www.AvePoint.com)



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