MICROSOFT 365
Virtual *MARATHON*

May 27 & 28, 2020
36 hours / 2 days

THE REAL WORLD

MICROSOFT 365 VIRTUAL MARATHON

Office 365 and Microsoft Teams Adoption (Government Edition)

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#M365VM
M365VirtualMarathon.com

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Allow myself to introduce … myself …

- Definitely not 40 yet
- Live in Virginia, right outside of Washington DC
- Work for AvePoint Public Sector
- I'm building a Tree fort and no one has died -- yet
- Problem Solver, Project Manager, and Solution Architect

The players in our story…

Oak Ridge National Laboratory
Science and Technology lab
Sponsored by DOE

The largest US DOE science and energy laboratory, conducting basic and applied research to deliver transformative solutions to compelling problems in energy and security that span a broad range of scientific and engineering disciplines

Tina Snyder
Mobile Systems Management/
Office 365 SME
Oak Ridge National Laboratory

Tina has been with Oak Ridge National Laboratory for 12 years and currently works on bringing her users into the world of Office 365. Her focus is on training employees about the benefits of Office 365 and increasing user adoption

Early efforts at modernizing collaboration at ORNL

Research and collaboration are key to the lab's success…

Lync → Skype for Business

If you don’t have a plan for your life…

Research and collaboration are key to the lab’s success…

Dropbox

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It's not the first time we've heard this…

Dispersed resources

- Increased on-boarding time
- 010101 101010 010101 Increased IT support workload
- Lack of centralized hub for information
- Tools used inconsistently across the organization

Disjointed collaboration and file sharing

- Delays in development and implementation of content and ideas
- Unreliable version control
- Inefficient co-authoring and file sharing
- Difficult to involve outside contributors

Shadow IT creates security concerns

- EVERNOTE
- Dropbox
- slack
- Google Docs

Solutions for mobile workforce

- Difficult to access and share files remotely
- Hard to integrate vendors and contractors
- Bring Your Own Devices
- Need to involve a growing Firstline and remote workforce
- Challenging to access conversations and notes across platforms or devices

The drivers for modernizing collaboration with Teams

Email (Outlook) VS Skype for Business VS Microsoft Teams	Email (Outlook)	Skype	Teams
Immediacy	○	●	●
Persistence and Follow-Up	◒	◒	●
Group Discussions	◒	◒	●
1 to Few Discussions	◒	◒	●

Conversations

Email (Outlook) VS Skype for Business VS Microsoft Teams	Email (Outlook)	Skype	Teams
File Collaboration	○	○	●
Meeting Recordings	✕	○	●
Managing Notifications	○	◒	●

Files and Notifications

What did the pilot look like at ORNL?

- False starts
- Lessons Learned
- Education Delivered
- Blockers Identified

Setting up your “pilot” groups…

- Recommendations
  - > 300 user orgs should consider having only a subset of users on “targeted” release
  - Target for “target” should be IT *AND* power users across depts
  - Use this group for O365, Desktop and Application evaluation

Teams for different Bureaus

Tax Assessor

Keep the team up to date on assessment rulings.

Public Works

Plan and manage projects to ensure minimum impact to constituents.

Risk Management

Aggregate and report on data while conducting risk reviews

Community Outreach

Plan events and marketing information. Compile feedback and hold reviews with stakeholders.

Information Technology

Drive centralized IT transformation and change management IT deployment, across bureaus and components

Law Enforcement

Post enforcement policy changes and report on trends and statistics.

Libraries

Organize schedules and plan events to increase library usage.

Legislative Branch

Collaborate on bills with colleagues and external stakeholders.

Department of Education

Develop and share educational policies.

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

Equipping your pilot groups

- Technology steps
  - Set release ring preferences
  - Set user-level app access
- Support your pilot group
  - Establish communication/feedback strategy (Teams is a perfect vehicle)
  - Establish an education strategy (Consider Office 365 Champions program) https://www.microsoft.com/en-us/microsoft-365/success/champions

Make it easy to choose the right template

- Users can make self-service requests from available workspace templates that are relevant to them
- Workspaces can come pre-configured with channels, tabs, and bots

Template	Channels	Tabs
Project (INTERNAL)	General	Conversations, Files, Planner
	PMP Material	Conversations, Files, Project Templates
	Documentation	Conversations, Files, Deliverable Templates
	Live Meeting Discussions	Conversations, Files, Meeting Notes

“Templates” are more than just channels and configuration.

A template framework that includes the site components, and the lifecycle components.

- Pre-set Channels and Tab recommendations are great for helping contextualize Teams for business users, but these only get you so far as a “template”.
- The AvePoint approach accounts for the Operational Governance and lifecycle to ensure “templates” are not ONLY provisioned correctly (and compliant with IT policy) but also managed

Project (INTERNAL)

TEMPLATE DEFINITION: Recommended for internal-department or ad-hoc Projects with a small-to-medium audience who require pre-configured default Project channels with real-time chat and meetings.

EXTERNAL SHARING	X No external sharing
EXPIRATION/ RETENTION	6 Months after last accessed
WHO CAN CREATE	All requests through Central IT
RECERTIFY MEMBERS	after 3 Months

ORNL: Learning from the past, looking to the future…

- The planning…
  - Analyzed data, workspaces, and technologies to determine which workloads made the most sense to migrate to the cloud and in which priority
  - Identified governance strategies to pilot
  - Began to share with users what changes were coming and the values and began work on a comms and training plan
  - Identified simplification of tasks for users migrating from Google suite and Drop Box (unofficial channels)

- Key initiatives…
  - Map changes to business value, not just technical capabilities
  - Develop a sustainable adoption program, not just a technical rollout schedule
  - Train, but know training isn't enough be agile
  - Identify a cross-discipline team

Not sure how to begin?

To help identify team scenarios, consider using the framework below

As someone in…
(Team)

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

Using…
(Specific application of the technology)

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

As someone in
the Contracting Office

I want to
have a single source of truth for all contracts that fall under my purview rather than hoping everyone is looking at the same version last sent to them via email

Using
a SharePoint site to store and share all contracts and metadata to identify versions (draft, vendor response, redlines, executed, etc) that my team can edit together using co-authoring in Word and PowerPoint

This is successful when
my agency Project Managers are using Teams to @mention me with inline discussions threads connected to contracts stored in related SharePoint sites

I.T. is chomping at the bit for governance

- Office 365 and related Collaboration solutions have ushered in a new era of Governance for IT.
- Don't try and organize your information by department… think about the information type instead.
- The shift from Records Management to Information Governance is a great compliment to IT governance.

THANK YOU FOR JOINING US!

DO YOU HAVE ANY QUESTIONS?

Speaker feedback
https://bit.ly/M365VMSpeakerFeedback

Event feedback
https://bit.ly/M365VMFeedback

Related Resources and Source Material

Related Materials

- FastTrack Productivity Library
- https://www.microsoft.com/en-us/microsoft-365/success/champions
- Deploying Teams & Groups by Loryan Strant
- "My Teams" adoption and technology blog series (case studies)
- 2020 Public Sector Records Readiness Report
- Microsoft Teams #WFHready Kit
- Webinar: How To Ensure Microsoft 365 Collaboration Success For Remote Workers
- Virtual Workshop Series: Get #WFHready with Microsoft Teams
- #ShiftHappens Week Online

Source Material

- Oak Ridge National Labs Migration Case Study
- Oak Ridge National Labs Related Blog
- Taming Digital Sprawl with Information Governance

Register Today: www.ShiftHappensCon.com

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