AvePoint

Beyond Microsoft Teams Deployment:
How to Roll Out A Sustainable Adoption Program in 90 Days

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Unleash the Power of You

About AvePoint: Corporate Overview

Migrate. Manage. Protect

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

From Tahoe to Today

- Inc. Magazine **Hire Power Award**
- Ernst & Young **Entrepreneur of the Year**
- Windows IT Pro **Best SharePoint Product**
- Deloitte **Technology Fast 500**

16K	6M	88	7
Customers	Cloud Users	Countries	Continents

Microsoft Partner

Microsoft

- **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

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Agenda

Establish a Sustainable Adoption Plan

5 Steps to educate users about Teams

Designing Governance Policy

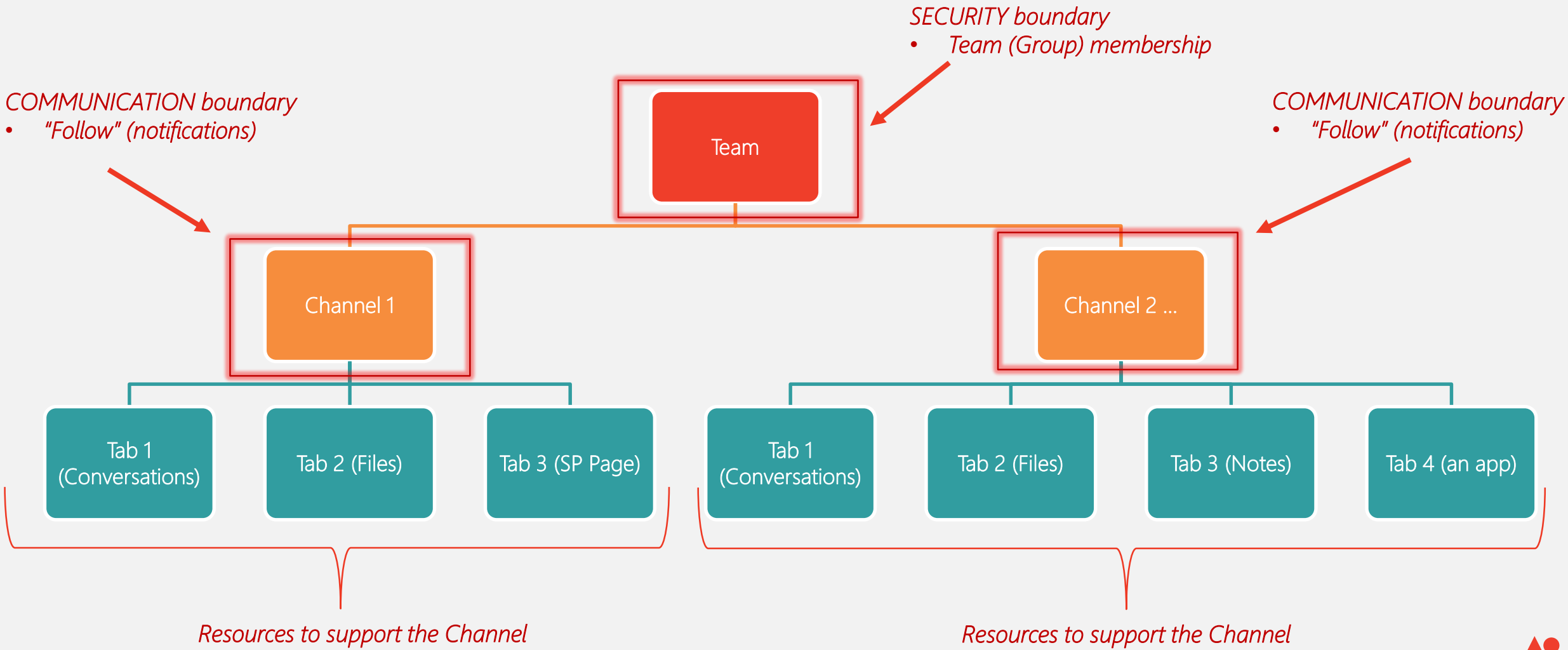
90-Day Project Plan Template

How AvePoint Adopted Teams

Driving Sustainable Adoption

AvePoint Governance Solutions

Visualize daily workflow inside Teams UI



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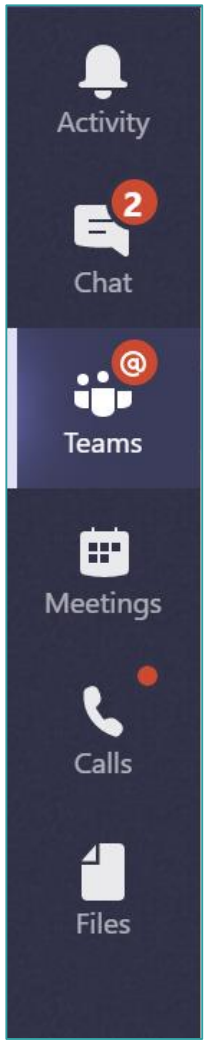
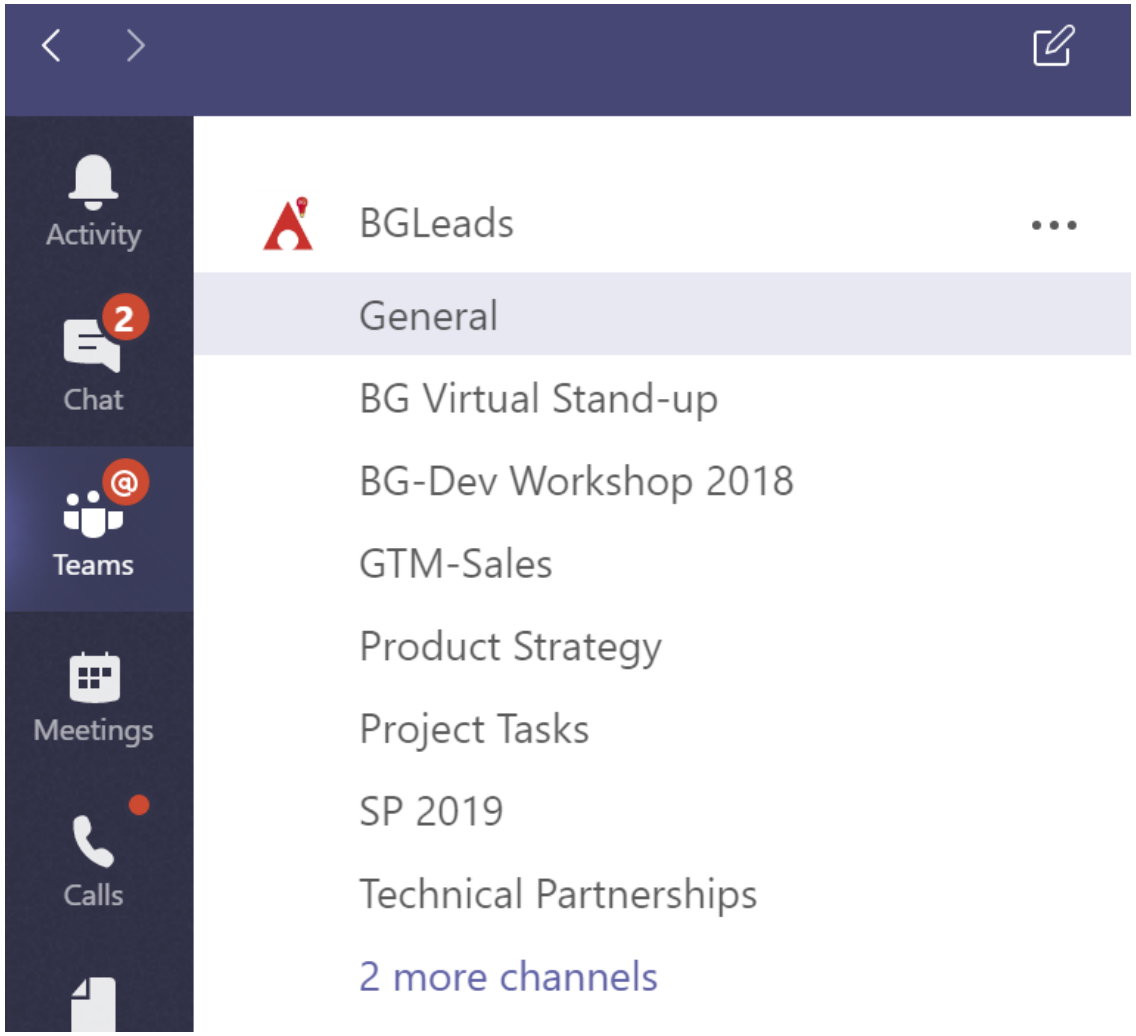
The Difference between TEAMS and CHATS

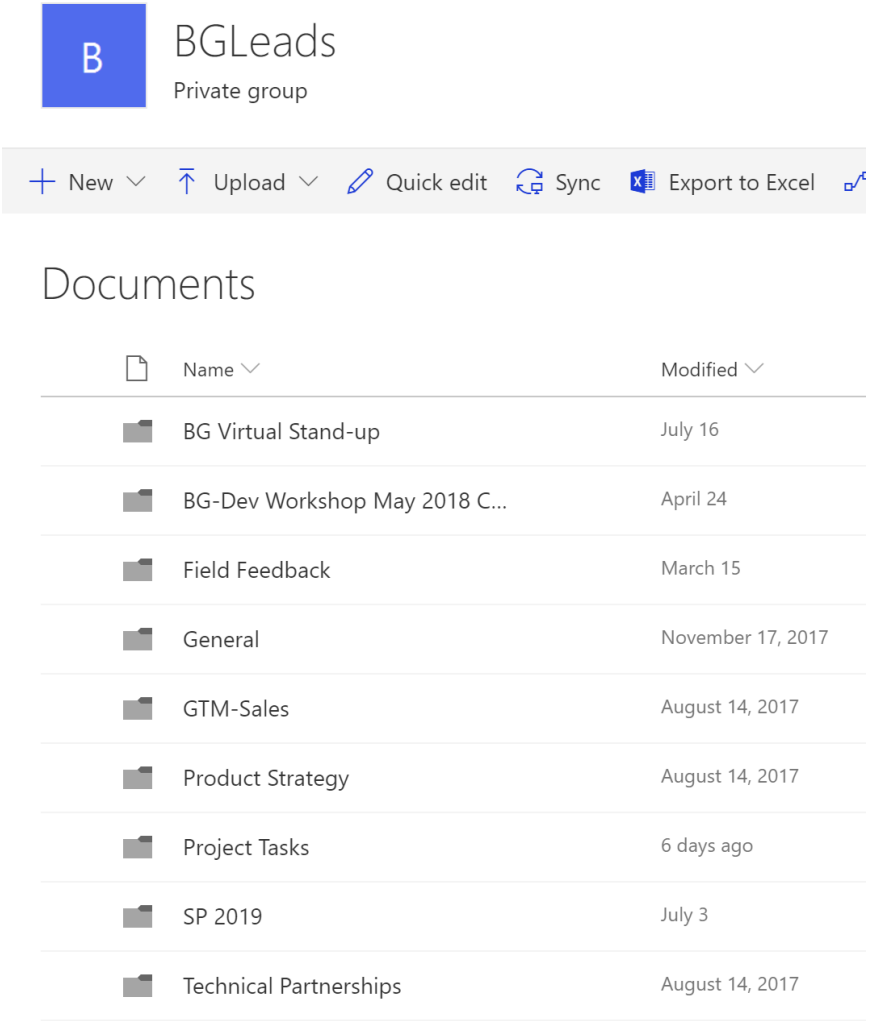


- Team Conversations
  - Visible to all Team members/owners
  - Uploaded files go into the SharePoint folder for the Channel
  - Conversation history goes into the Team mailbox for compliance needs (hidden)
  - Notifications will be sent to those following the Channel + those who are @mentioned

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

Understanding the SharePoint and Teams relationship





Where Are My Conversations Stored?

Chat service

In memory processing for speed

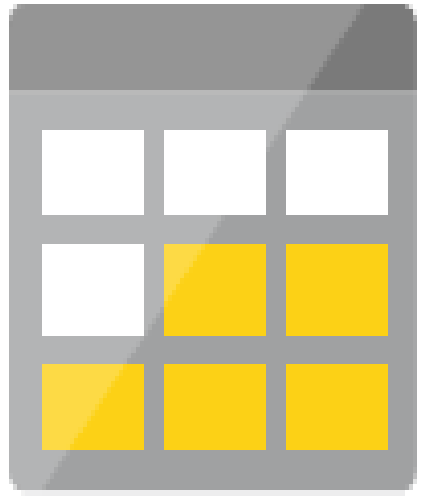
Leverages Azure storage (blob, tables, queues)

Substrate / Exchange

Chat and channel messages are also stored in Exchange for information protection

Conversation images & media

Inline Images/Stickers are stored in a media store, Giphys are not stored.



Where Are My Files Stored?

1:N chats

Files are uploaded to **OneDrive for Business** and permissions are set for the members of the chat

Team conversations

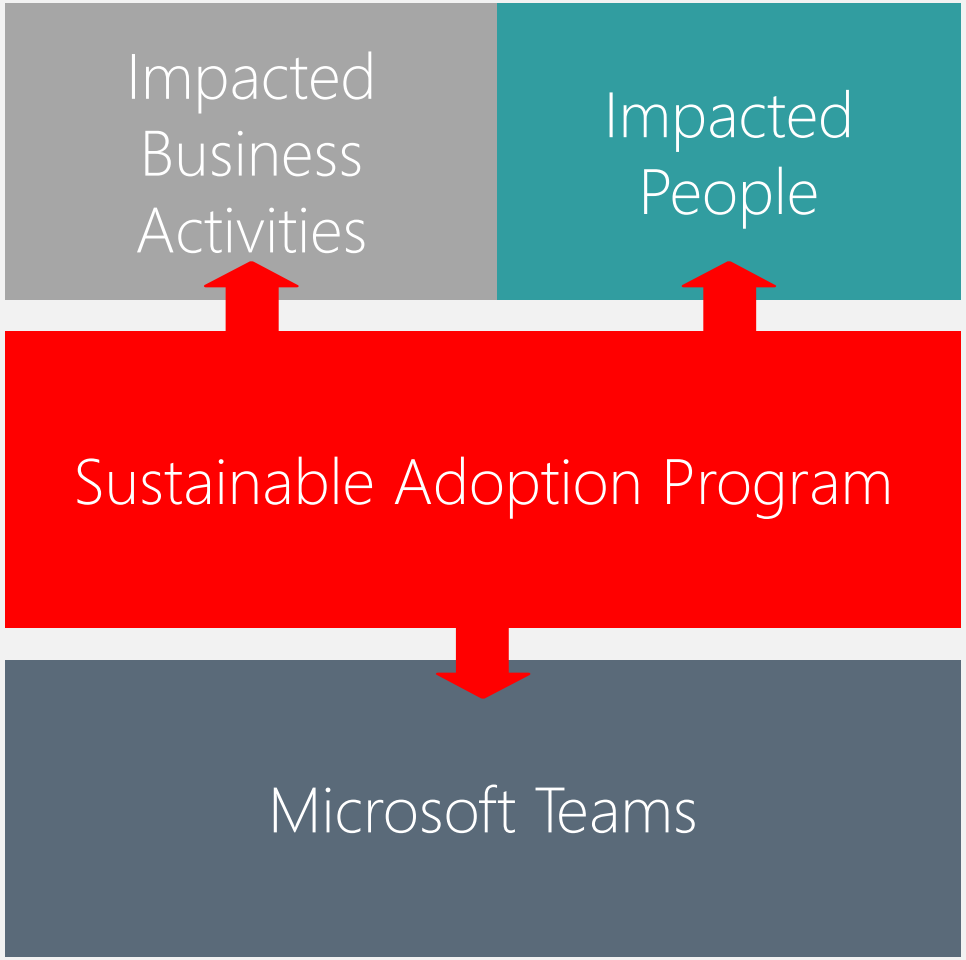
Files are uploaded to **SharePoint**. A folder is associated with each channel in the team

Cloud storage

Dropbox, Box, Citrix ShareFile, Google Drive

Establish Sustainable Adoption Plan

Sustainable Adoption Objectives



- Minimize the negative impact of making technology changes
- Promote adoption of Microsoft Teams in a “Controlled” way
- Provide users with digital resources to efficiently accelerate their learning paths

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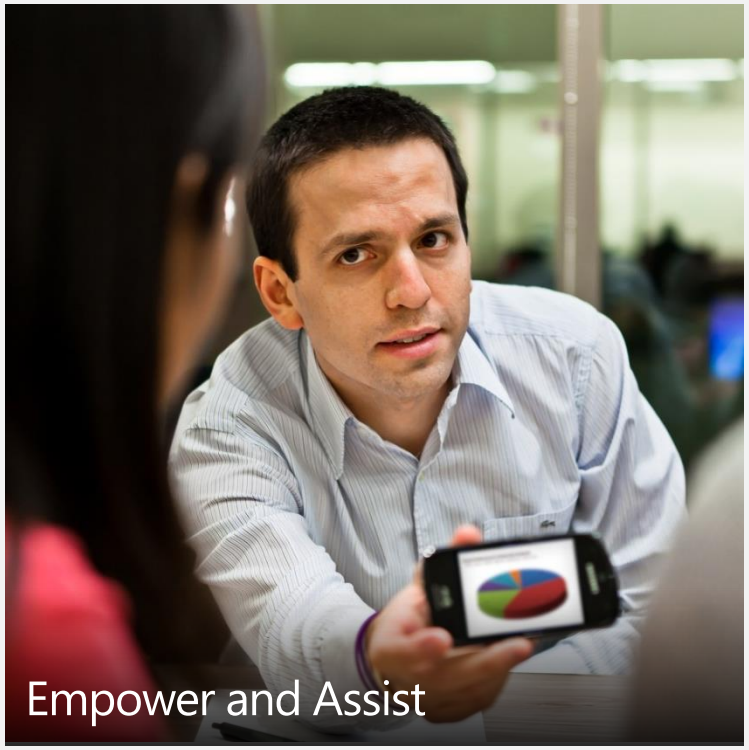
Goal: Drive Sustainable Adoption



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Why training alone doesn't work

Technology focused

- Lack of buy-in
- Unclear expectations
- Non-contextual
- What's in it for me?

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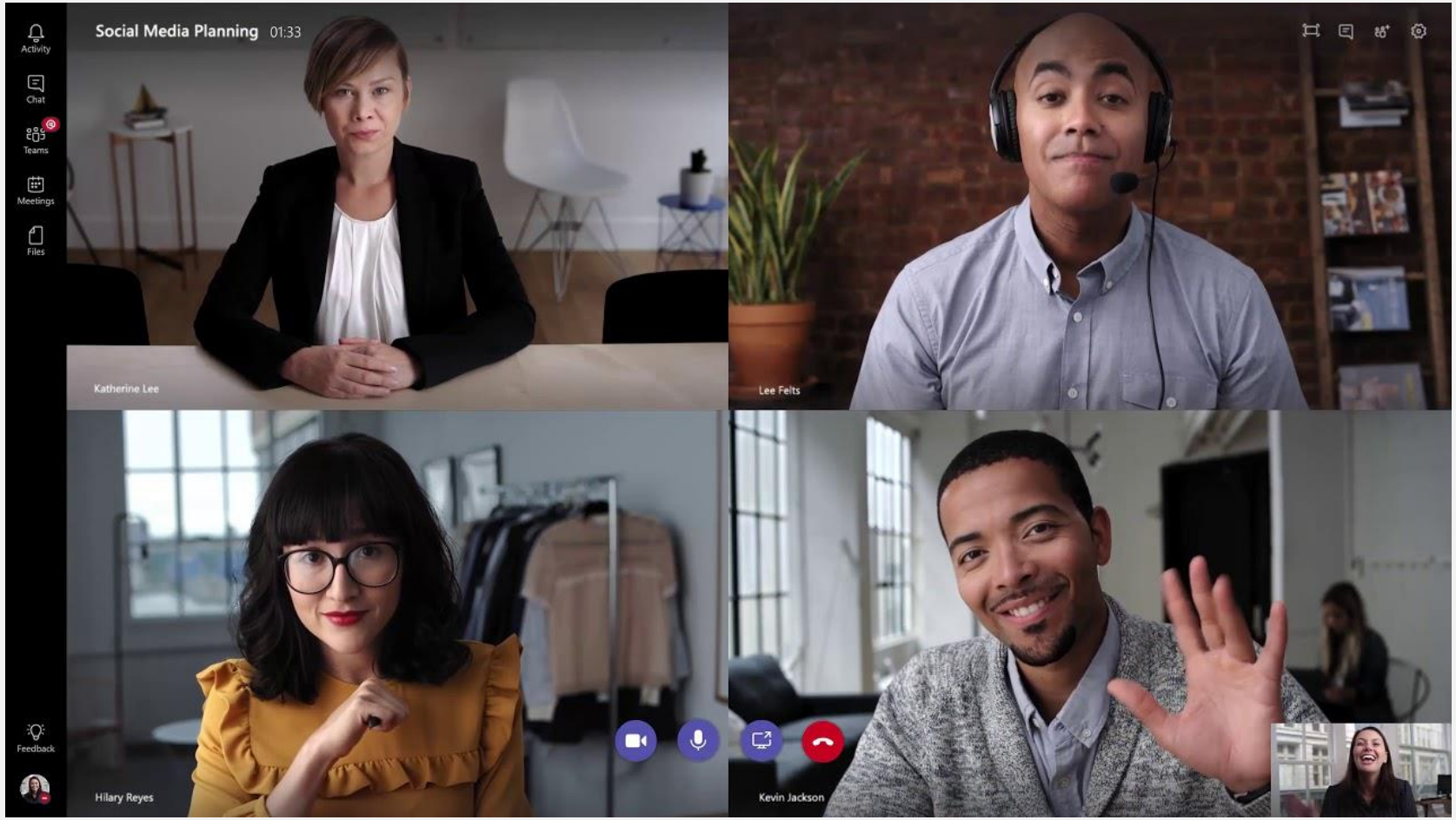
5 steps to educate users about Teams

Step 1:
Make it easy to do the right thing

- Determine rules of engagement in your org
- Focus on business scenarios (Use Cases)
- Protect users by automating governance

Example: Make meetings better



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Create Productivity Library in SharePoint

Engineering, Research & Development

Share best practices across geographies

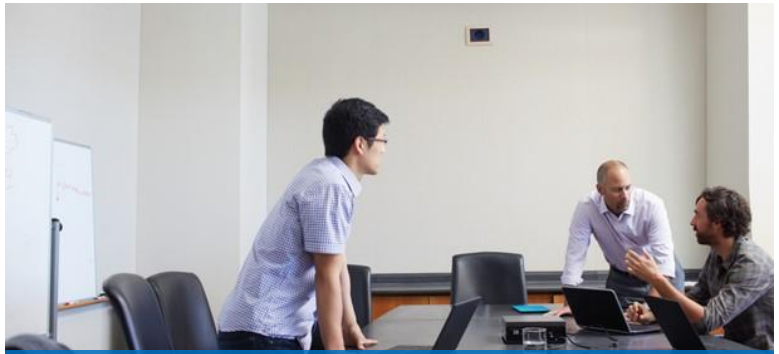
Operations, Manufacturing & Logistics

Improve and monitor business processes

Sales, Marketing, PR & Communications

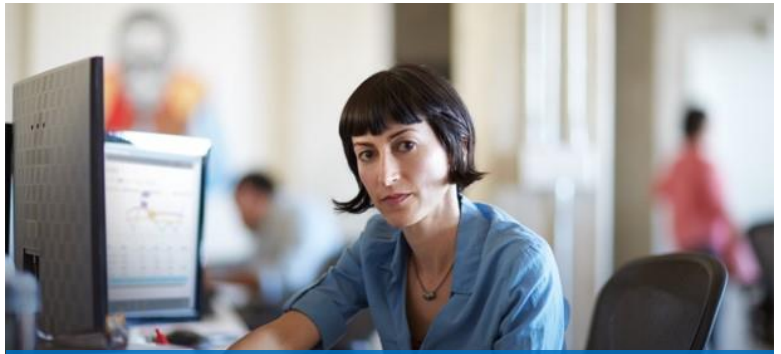
Align Sales and Marketing teams

HR & Legal Services



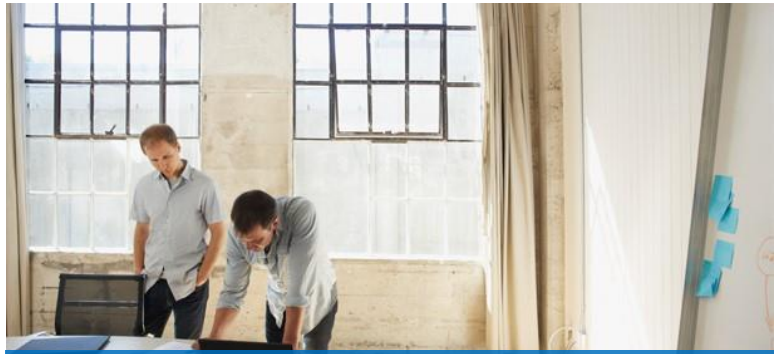
Gather & process forms from employees

Accounting, Finance & Procurement



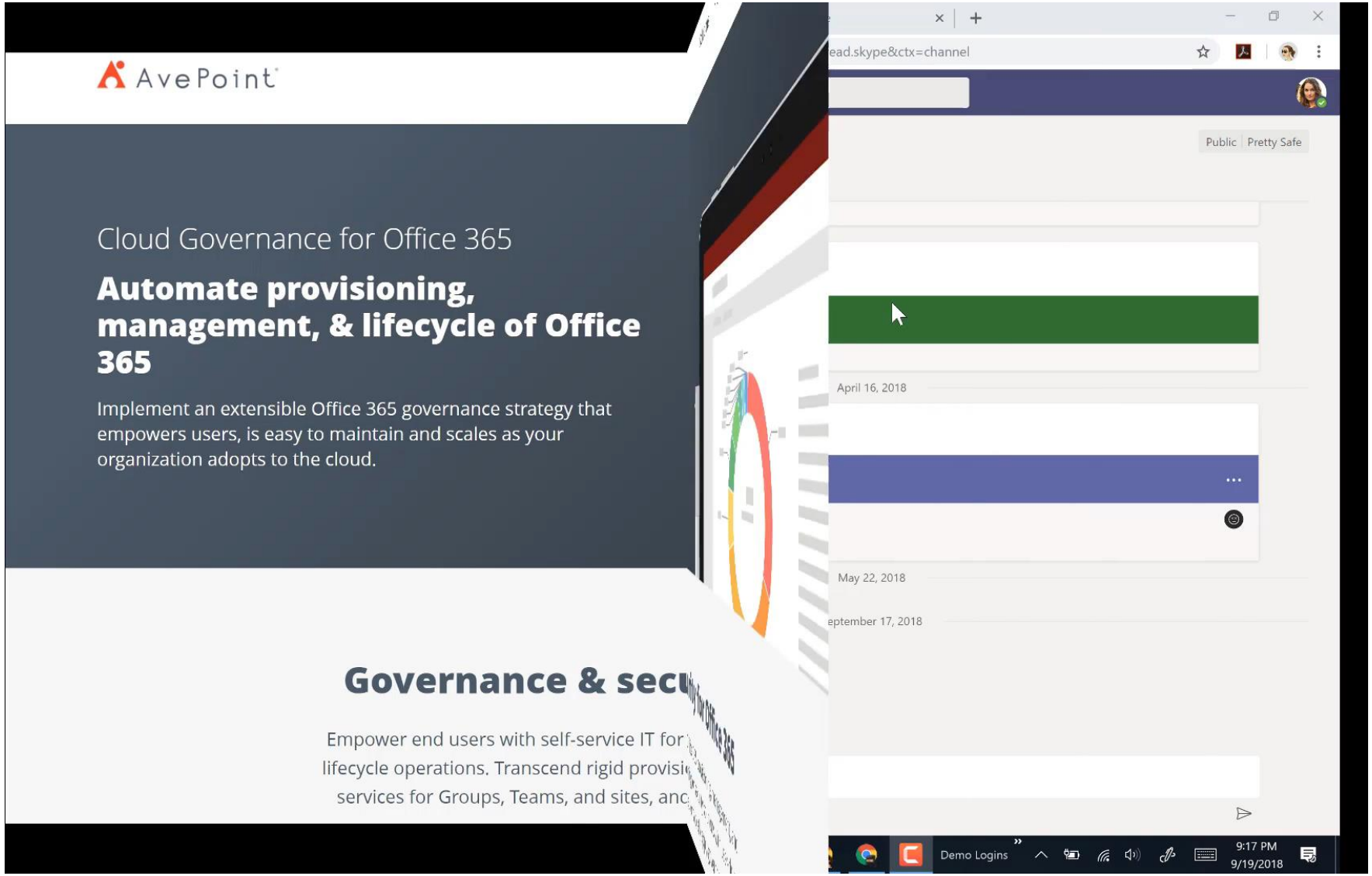
Pull data and build financial reports

Administration



Organize teams and manage calendars

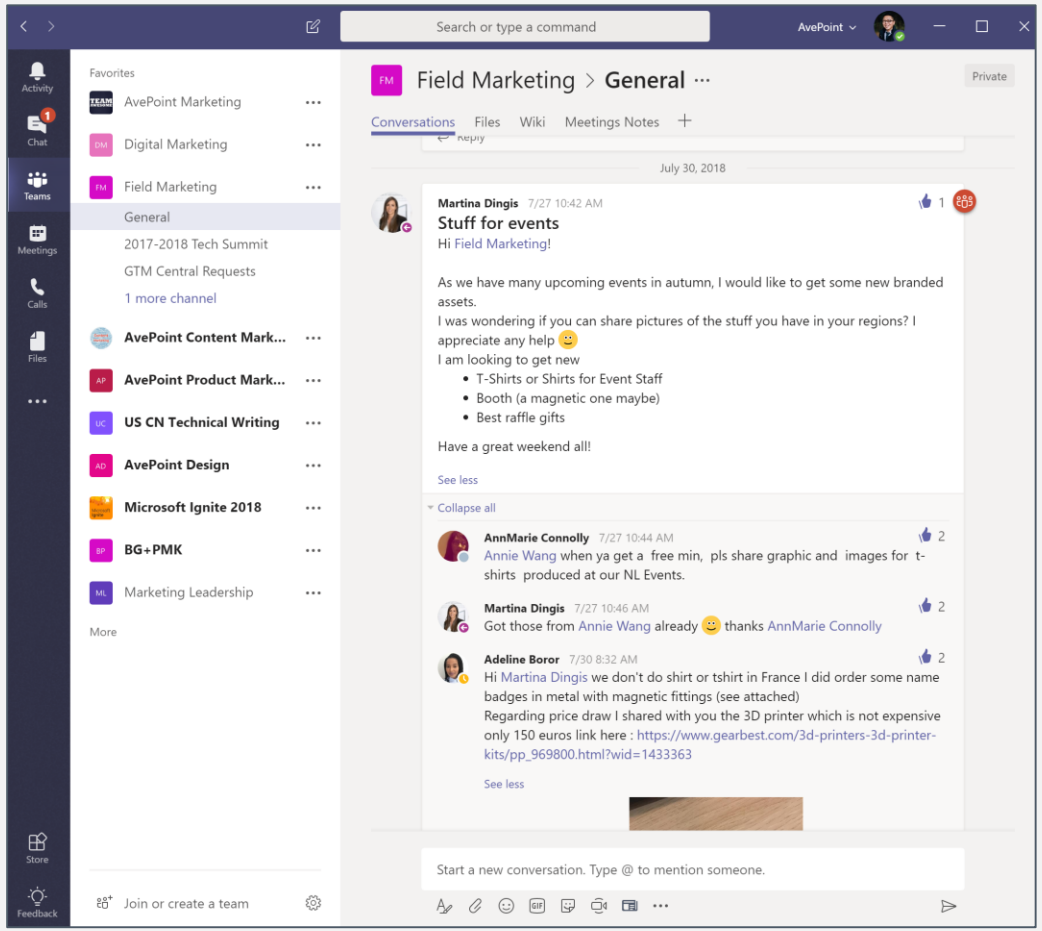
Automated Governance and Self-Service

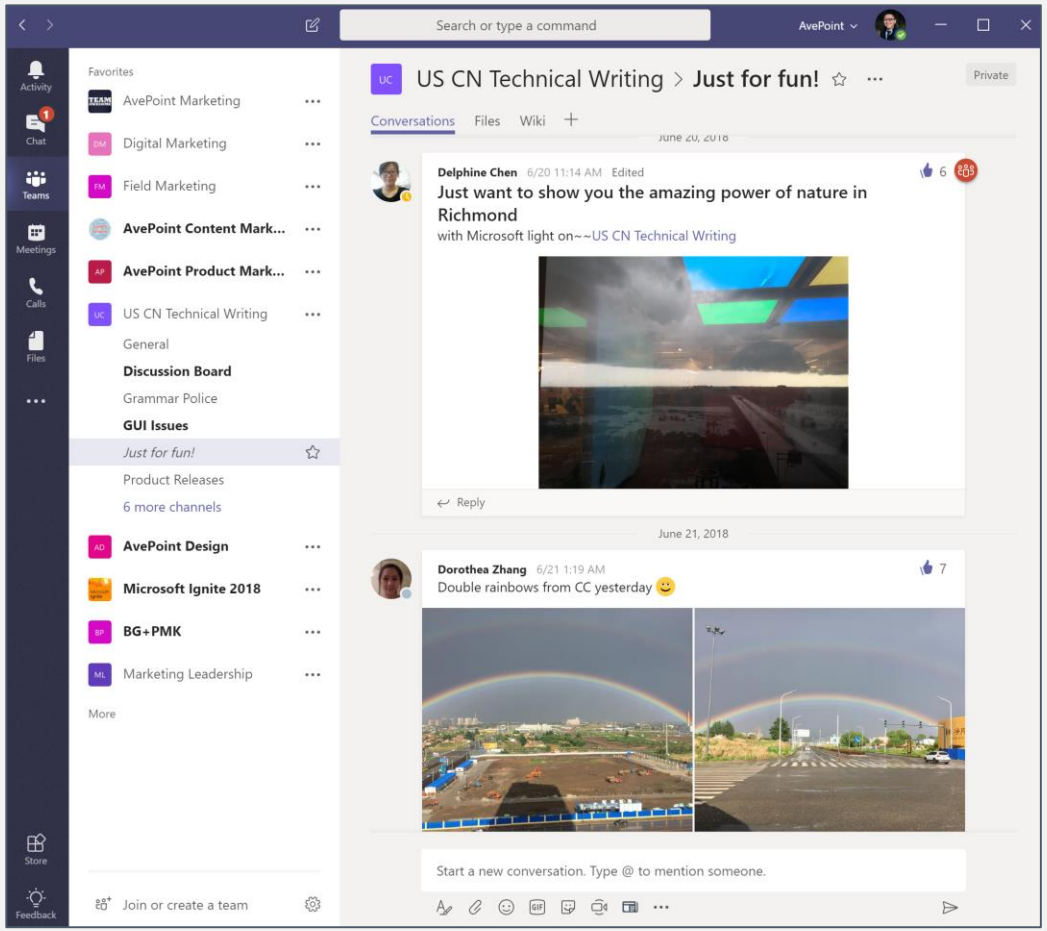


Step 2: Facilitate leadership buy-in

- Highlight financial benefits
- Demonstrate better transparency
- Expedite organizational agility

Example: Global team collaboration





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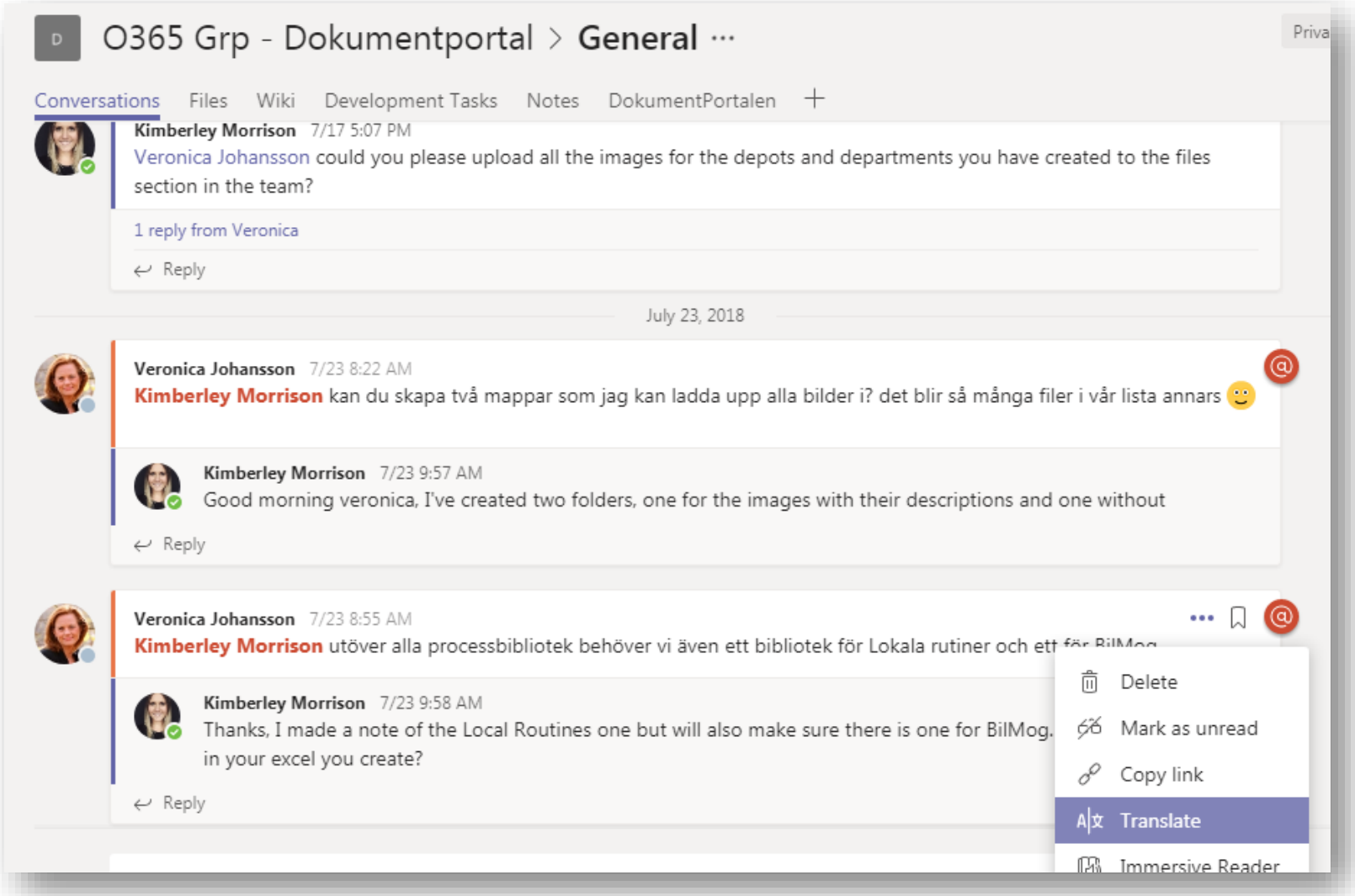
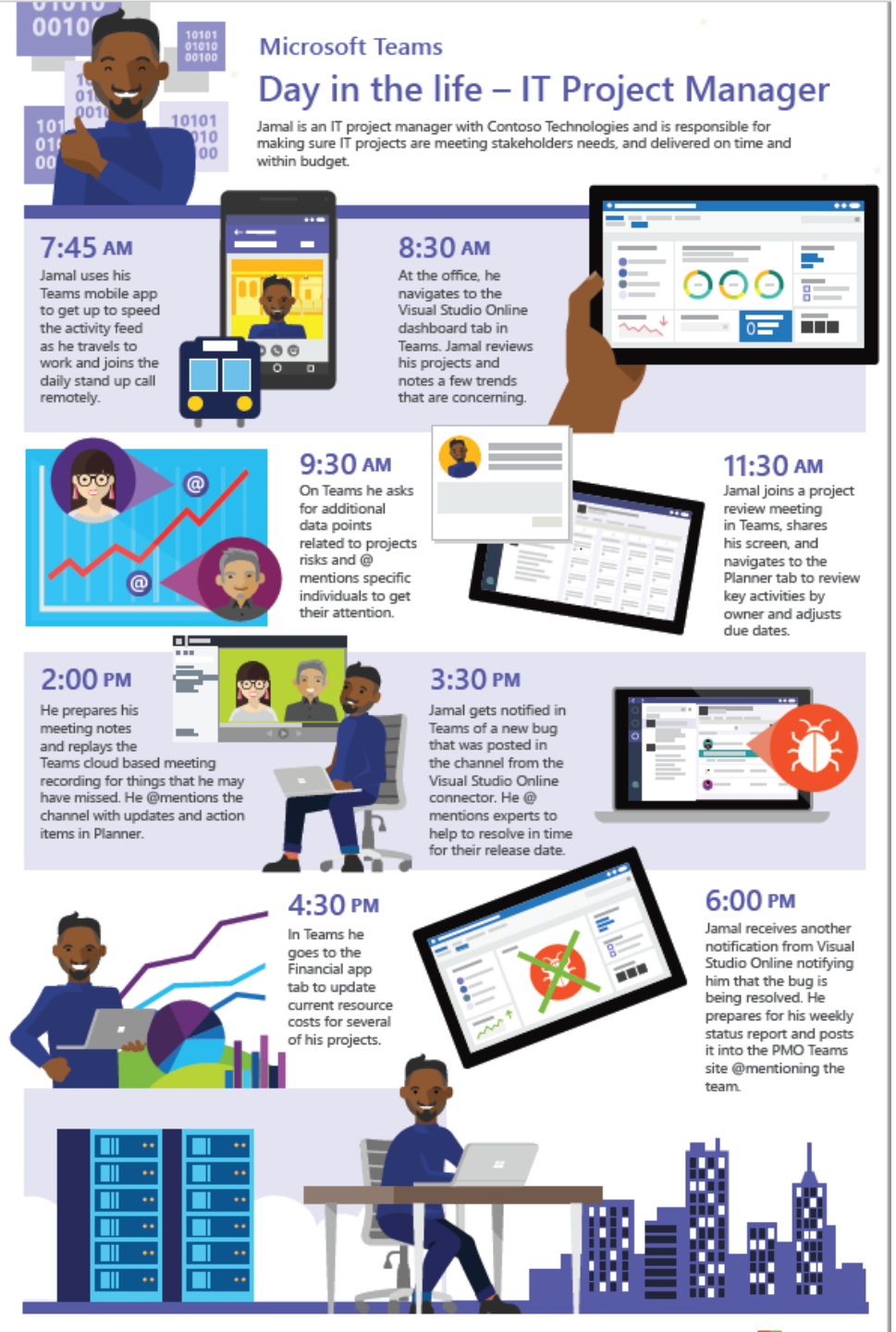
Step 3: Ensure quick wins

- Enable mobility
- Provide a one-stop shop
- A day in the life

Example: Mobile Access

Example: Real time translation





Example: A Day in the Life

Make it relevant to their role

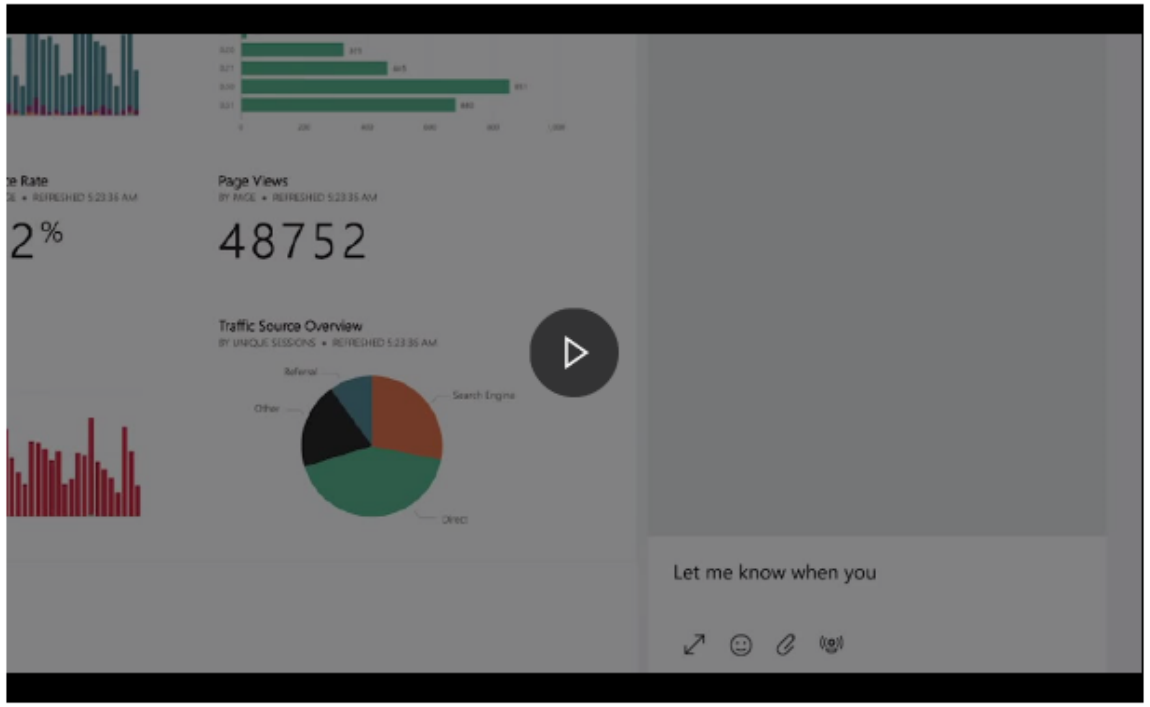
Step 4: Develop Contextual Learning

- Use case driven
- On-demand
- Always have a call to action

Example: Microsoft Teams for Sales

Bring together content, people, and tools in one place

As a sales manager, you work with many different tools and people. **Microsoft Teams** is a digital, chat-based workspace for today's teams. After setting up a group in a Teams channel, you can email the entire channel, send attachments, and receive notifications from all posts in a channel. Channels bring together chat, content, people, and tools in one place so everyone has instant access to everything they need. You can set up different groups for specific workflows like account transitions or customer feedback.



Microsoft provides tons of use cases here:
https://www.microsoft.com/en-us/microsoft-365/success/

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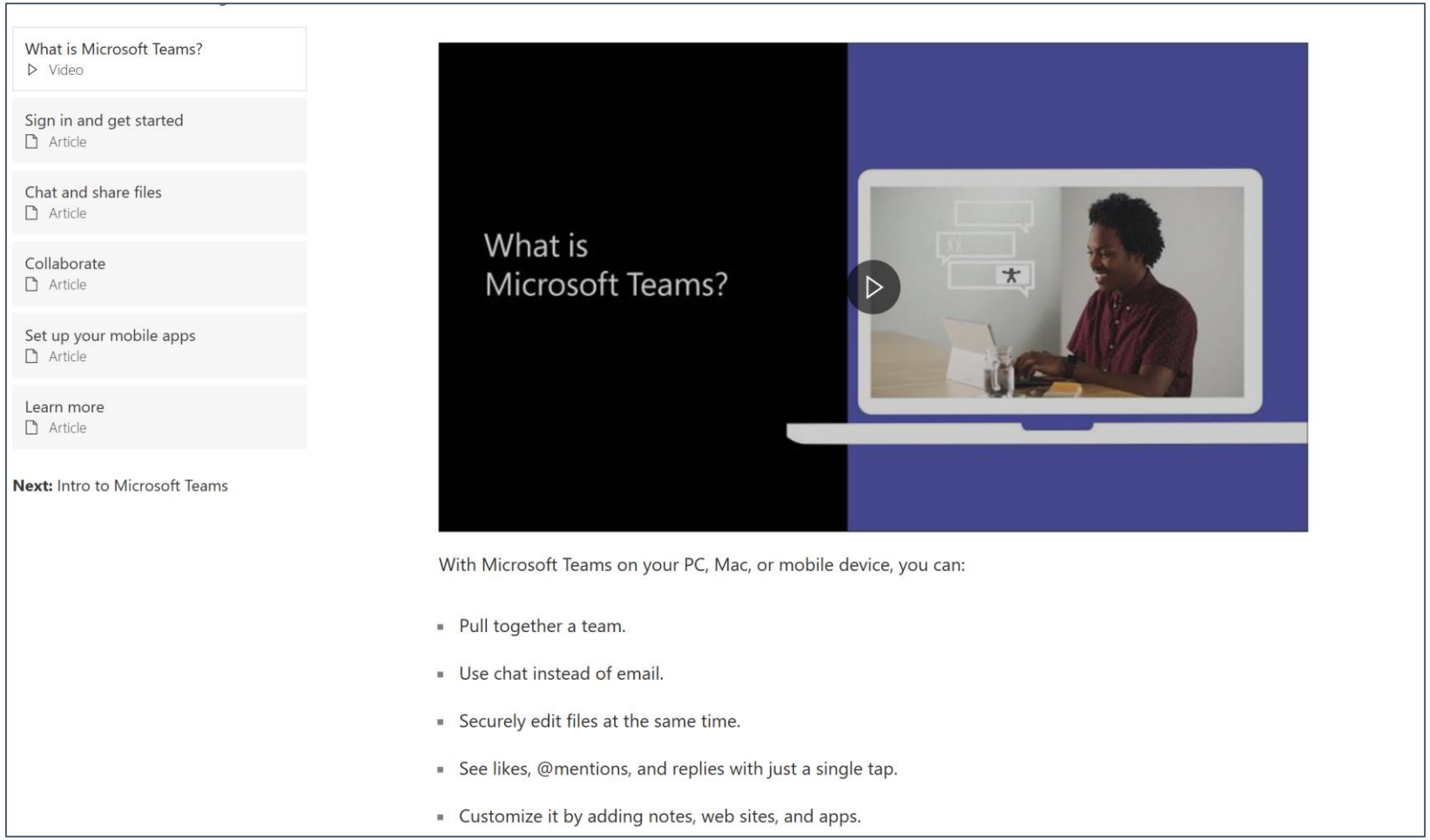
Example: On-Demand Learning



Video Training: What is Microsoft Teams?

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…

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

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Step 5: Create Your 90 Day Plan

- Identify specific use cases
- Conduct pilot
- Launch company wide

Example: 90 Day Plan

Month 1

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

Month 2

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

Month 3

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

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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 integrating 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

90-Day Project Plan Template

Designing Governance Policy

Simplifying the learning curve for users

Office 365 Groups

Planner
Outlook
SharePoint Online
=
"Outlook Group"

Microsoft Teams
=
"Team"

yammer
The Enterprise Social Network
=
"Yammer Connected"

Benefits of well-governed implementation

Repeatable and consistent service delivery

Administrative efficiency

Accurate cataloging & monitoring of adoption, usage and governance attributes for collaboration workspaces

Provable compliance with internal and external policies and regulatory requirements

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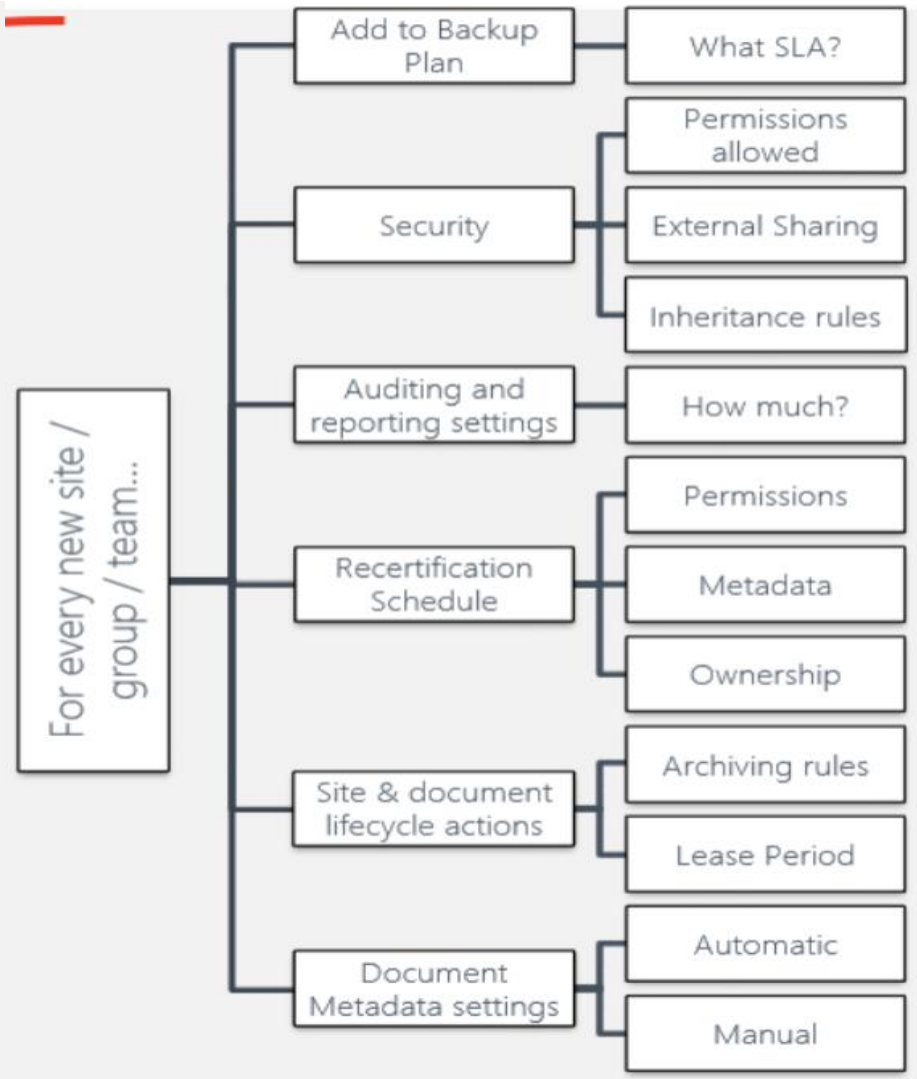
How do I manage Office 365 collaboration workspaces at scale?

Governance Policy Decision Points



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Govern Provisioning

- Sprawl
- Duplication
- Appropriateness
- Convention
- Cataloging

What do I need to govern?

For collaborative workspaces, customers want to govern:

How are Teams requested, approved, and created	How are availability, compliance, and changes managed over time	How do we retain, expire, or dispose of Teams at end of life
Provisioning	*Management*	*Decommissioning*

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Govern Ongoing Management

- Monitor usage and adoption
- Ensure users aren't doing what they shouldn't
- Quota enforcement
- SharePoint governance

Govern End of Life Processes

- Expiration
- Retention
- Policy enforcement

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

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How AvePoint Adopted Teams in 2018

Company Background

1600 Employee Company, operating in 88 countries

Existing MS Enterprise Agreement

Heavy Skype user with a cloud first mentality in early 2018

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Challenge of Introducing Teams when Skype Exists

Users don't know what to use when adding confusion

Employees leverage multiple applications depending on preference

Lost productivity and exposure to risk by not having an enforceable governance solution strategy

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What's the plan?

Education- As we understood that TEAMS was the next platform for collaboration, we made it a point to understand its capabilities and how it could potentially solve our potential redundant collaboration challenge

Discussion- Once we recognized that TEAMS was the best fit for our company, we began conversations around the best way to approach the rollout of a new platform. From those conversations we developed a 90 day plan for user adoption.

Leadership involvement- We are very fortunate to have a CMO who recognized the power of TEAMS and how it could positively affect our company. He volunteered to spearhead the initiative from the executive tier.

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Transforming our corporate culture (high level plan)

Step 1- Identification of the pilot group

Step 2- Target a simple use case where the user community can see benefit

Step 3- Execute pilot of use case within the pilot group

Step 4- Build excitement around successful pilot and request involvement from additional user groups

Step 5- Begin transition of corporate communications and company updates from Skype to TEAMS to familiarize our user community with UI

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Our Pilot User Group- Marketing

- Our internal marketing team was elected as the first group to adopt TEAMs because they needed to communicate with multiple divisions in order to build marketing collateral for all of AvePoint's divisions.
- Event schedules are critical to our business, but we didn't have a single location to reference them. Our sales campaign progress and feedback tracking were stored in multiple locations.
- A combination of SharePoint, Yammer and Skype "could" have solved the problem. Instead, they created, the marketing TEAM with channels to organize the structure of their business within AvePoint.
- This enabled marketing teams to communicate status on events, post new events via calendar, submit tasks via planner, post new presentations via the SharePoint plug in and direct specific, trackable chats within each regional channel to keep the company up to date.

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The Net Result

Application Consolidation- We no longer need Skype for one off communication strings for marketing activities.

Direct Communication- sales teams can now receive real-time updates on pending events in their regions and ask specific questions via their channel to get the information they need.

Company Coordination- all teams, including our executives have visibility into all upcoming marketing initiatives and can effectively pass on information to our customers

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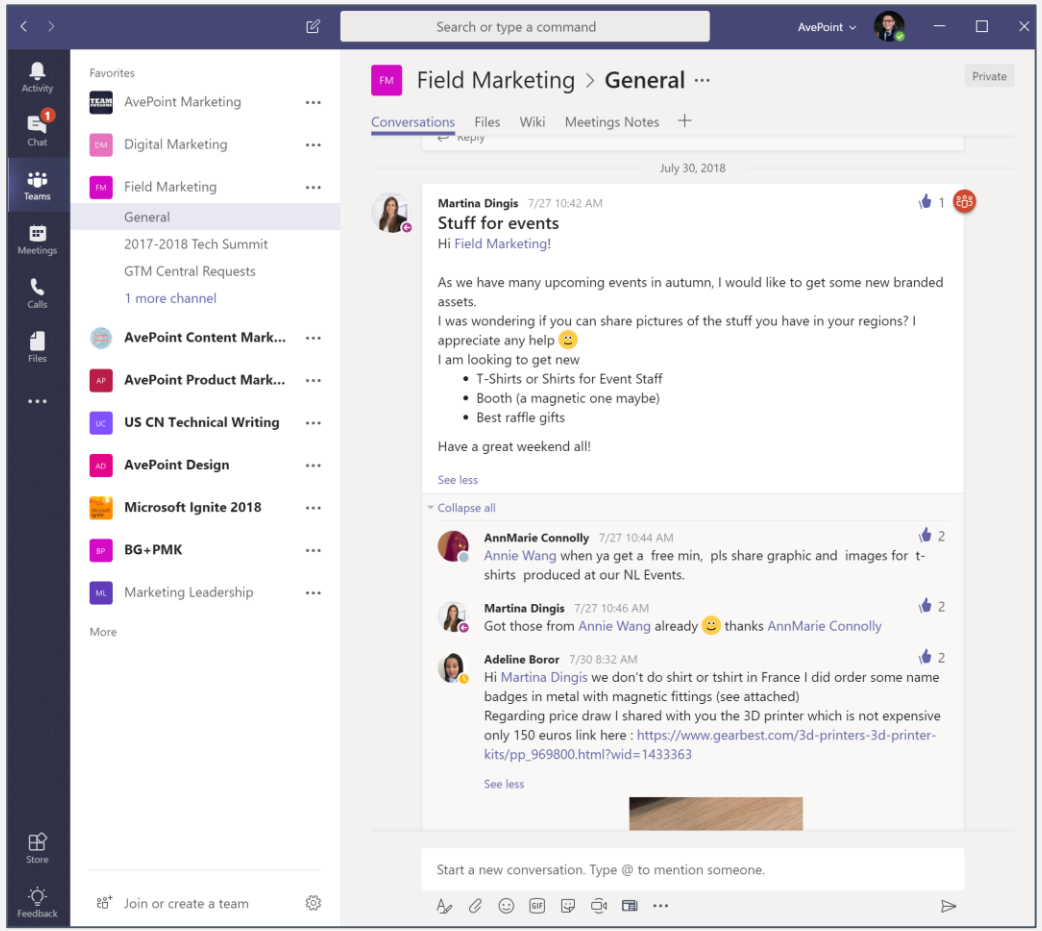
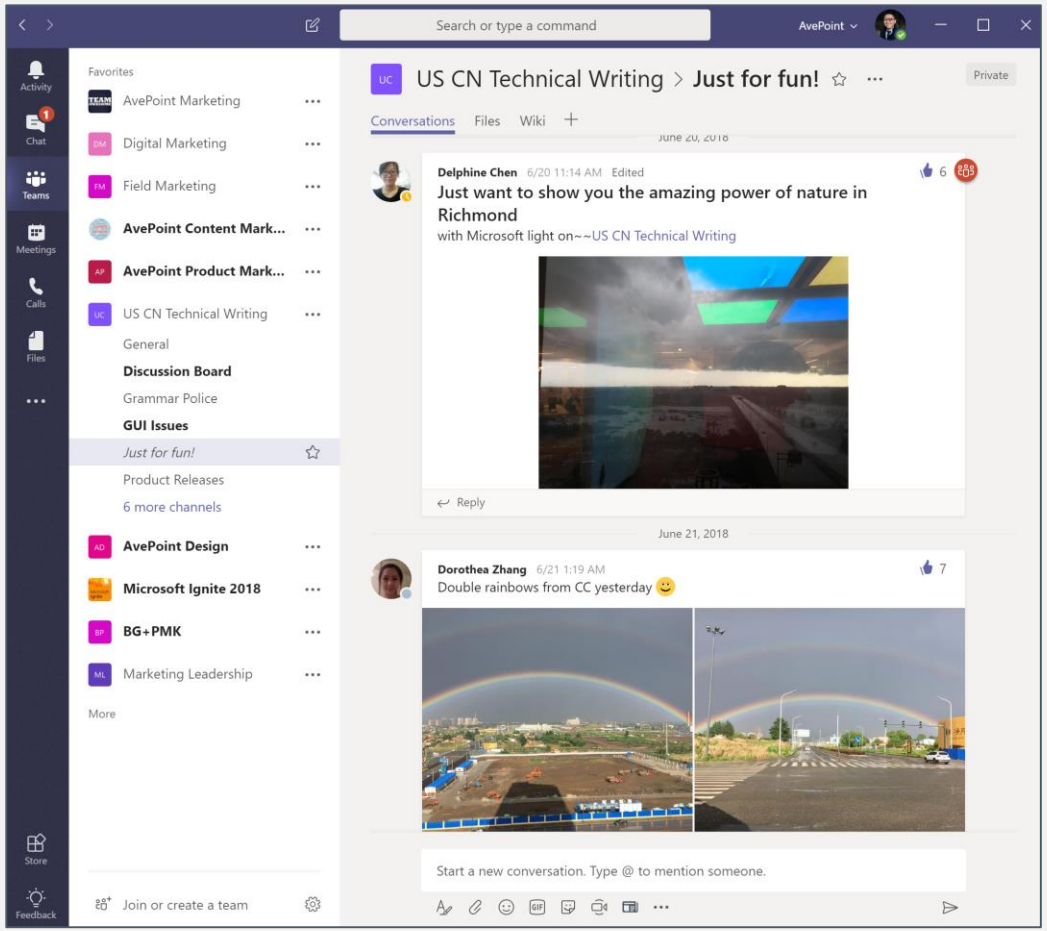
Example: Global team collaboration





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Drive Adoption Success

This is a Team effort not just IT's job alone

Office 365 Implementation

Business Engagement

Drive Adoption

Support & Maintenance

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Engage Key Business Groups

Corporate Communications

Human Resources

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Facilitate Governed Empowerment

Draconian IT Control

X

Governed Empowerment

Wild Wild West Chaos

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Establish Scalable Support

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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

Ensure sustainable adoption

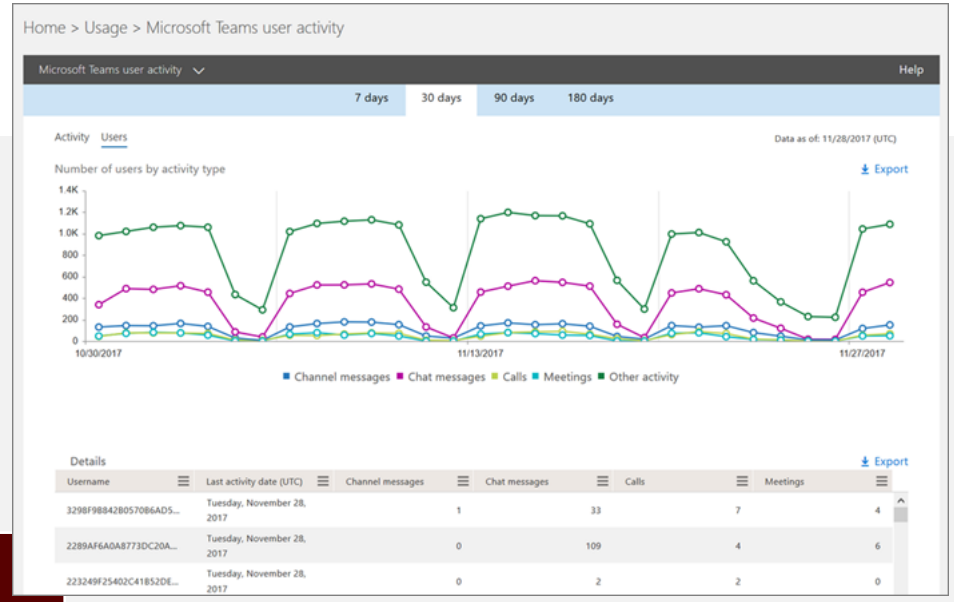
Consistently gather feedback

Schedule regular learning activities

Introduce relevant new features

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.

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AvePoint Solutions

Cloud Governance – May 2019

What we are showing today

Self service and automated provisioning based on business need

- Site Request
- Provisioning Approval

Lifecycle Management

- Inactive Site Notification

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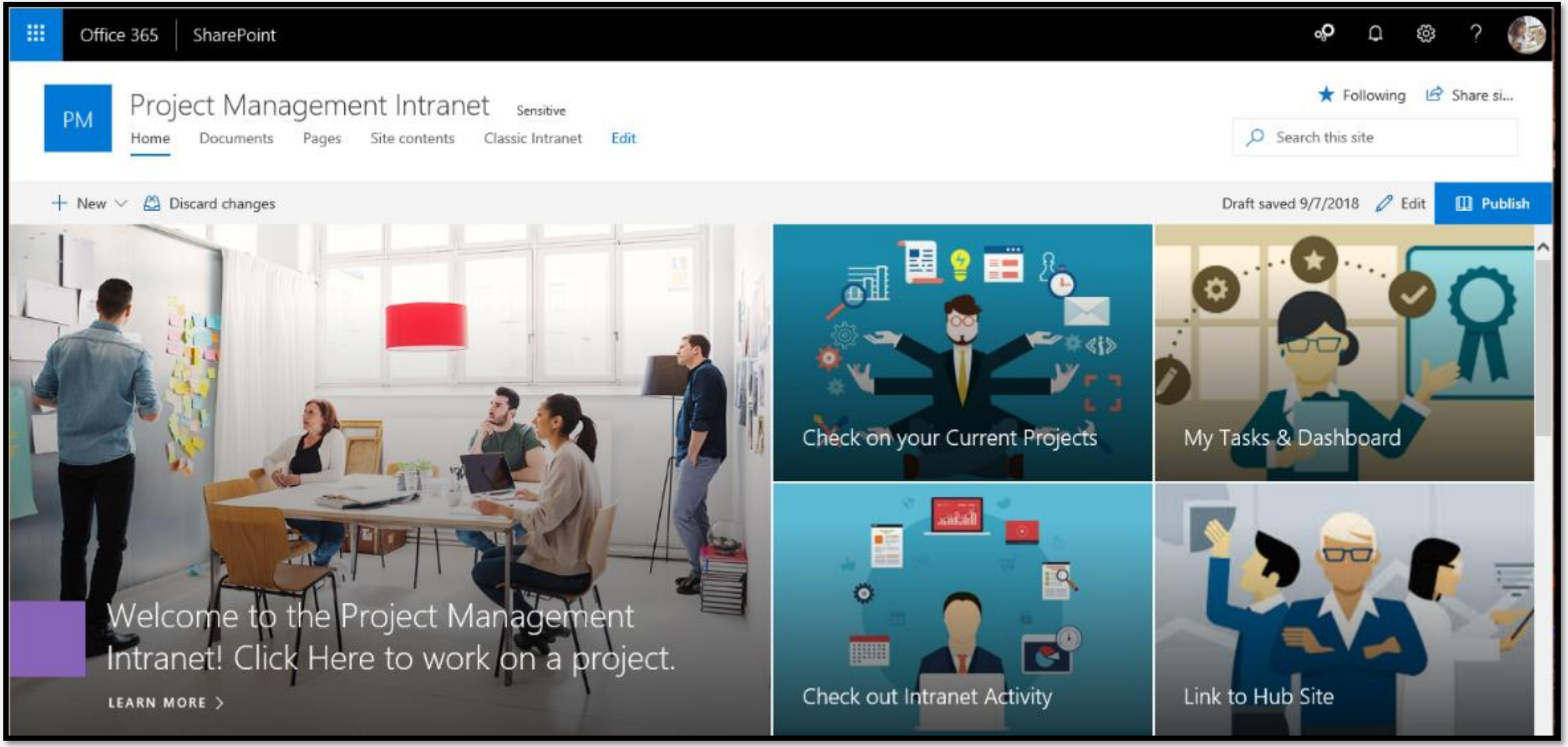
New Site/Team Request

Self service and automated provisioning based on business need

Rita Brewer

Rita completes a questionnaire via her company's workspace catalogue for a Public Charity Event



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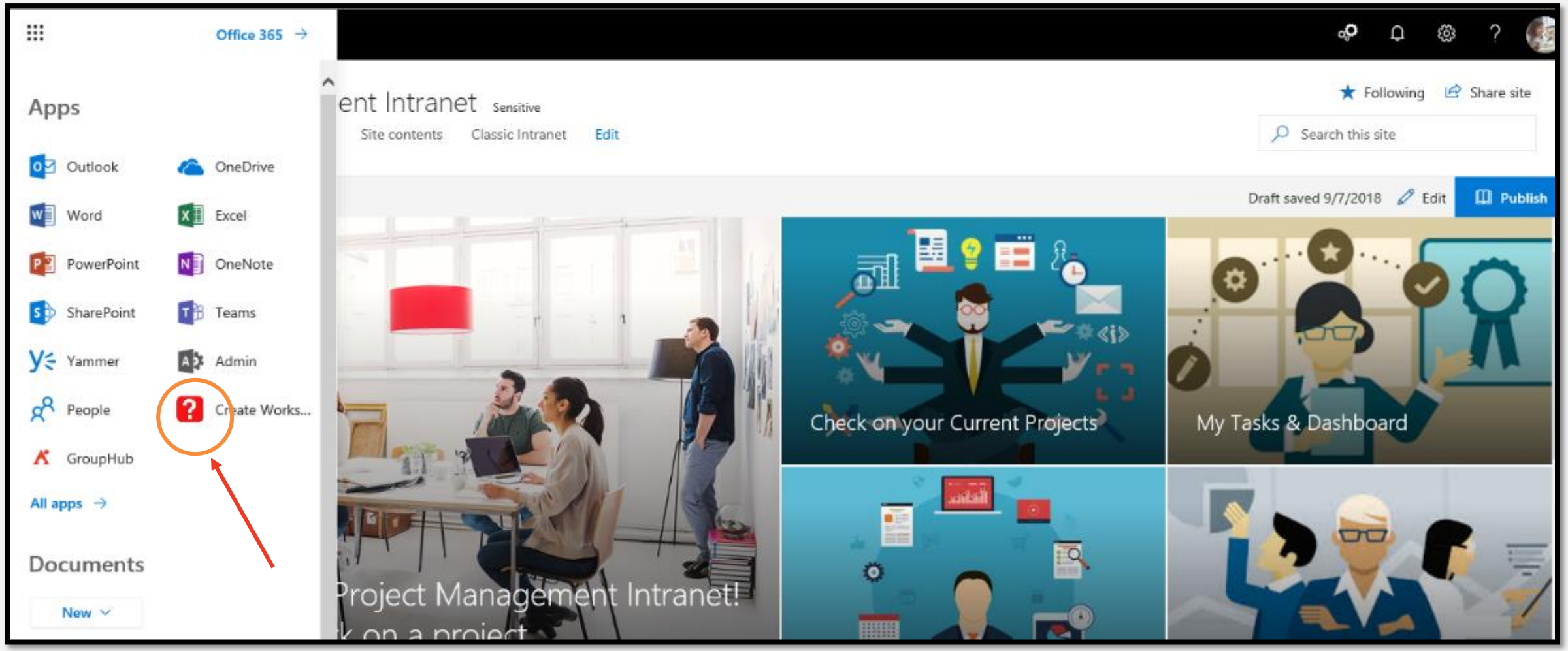

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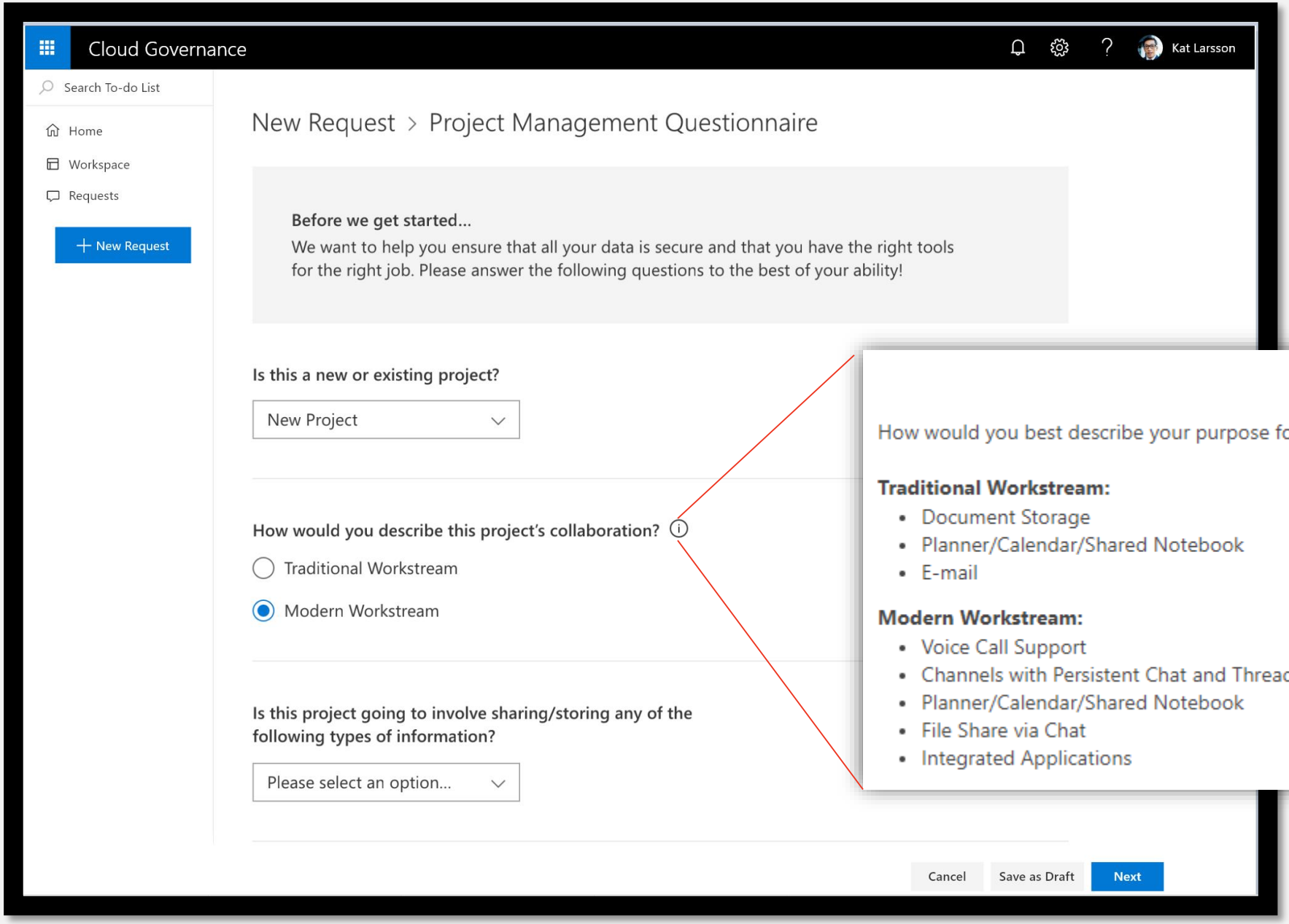

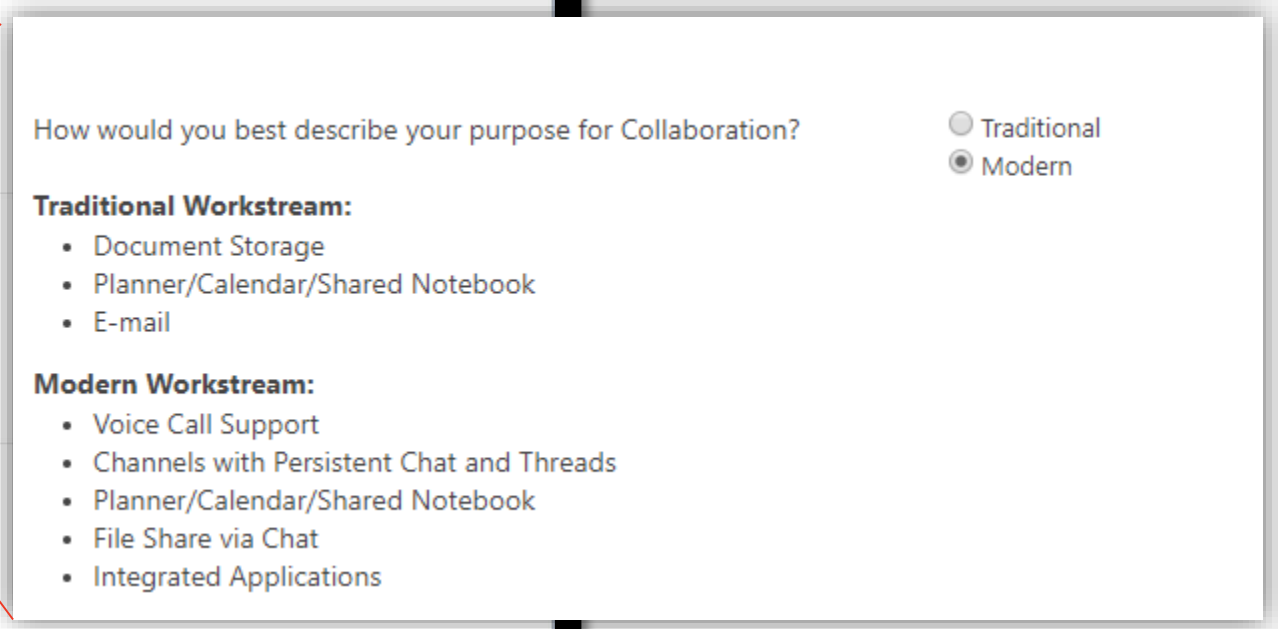

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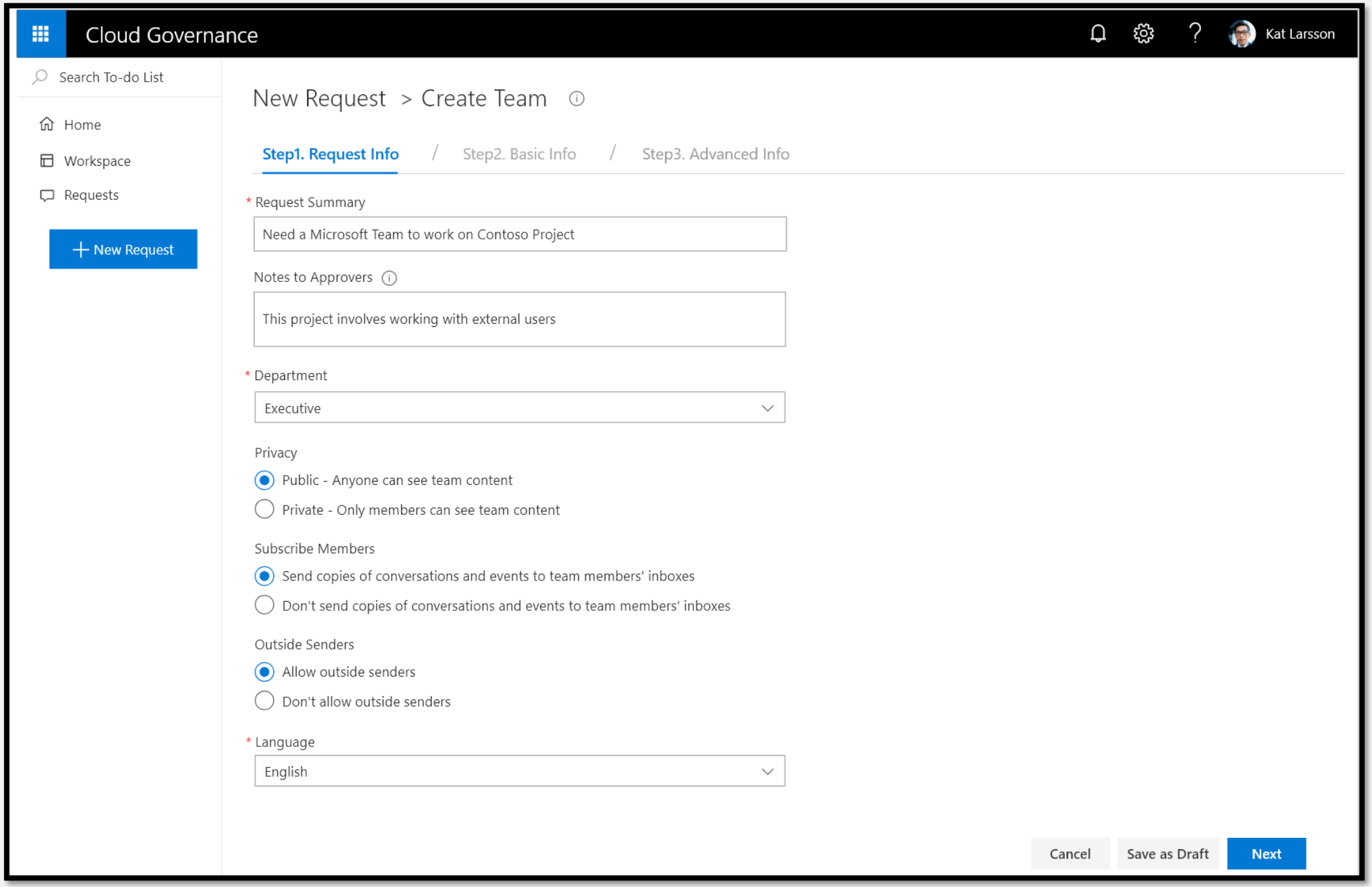
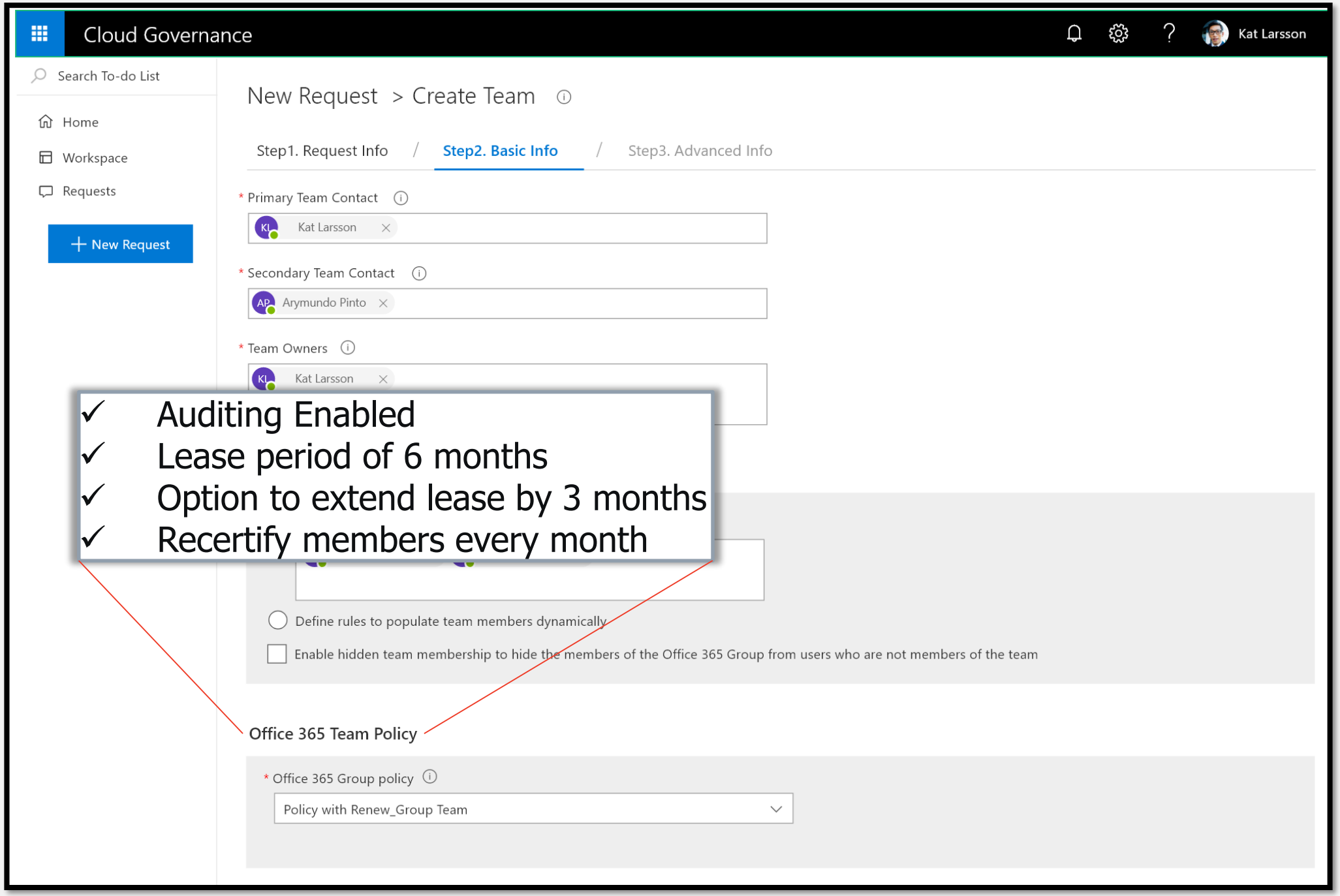
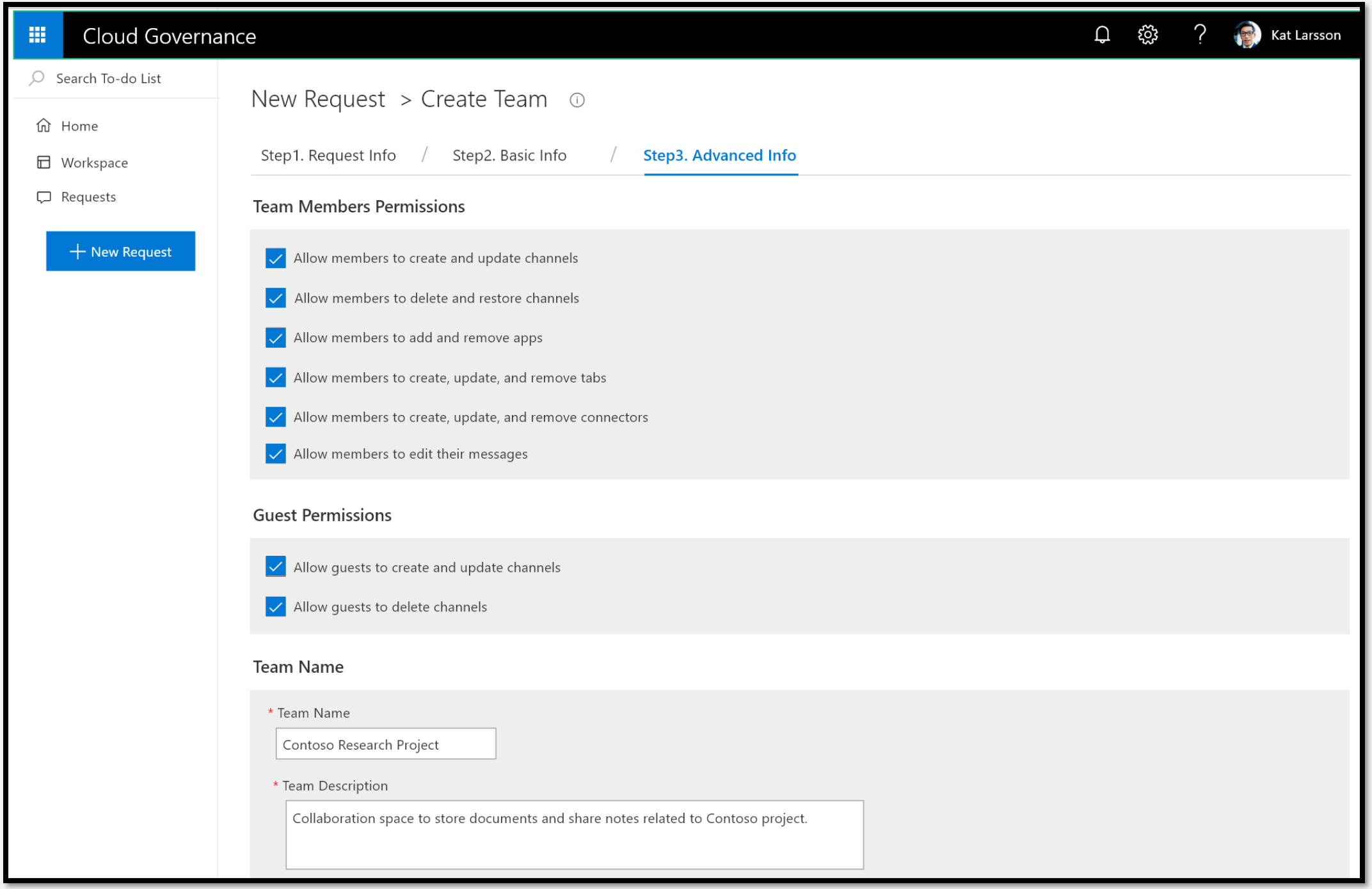

Cloud Governance
Kat Larsson
Search To-do List
Home
Workspace
Requests
New Request
New Request > Create Team
Step1. Request Info
Step2. Basic Info
Step3. Advanced Info
* Request Summary
Need a Microsoft Team to work on Contoso Project
Notes to Approvers
This project involves working with external users
* Department
Executive
Privacy
Public - Anyone can see team content
Private - Only members can see team content
Subscribe Members
Send copies of conversations and events to team members' inboxes
Don't send copies of conversations and events to team members' inboxes
Outside Senders
Allow outside senders
Don't allow outside senders
* Language
English
Cancel
Save as Draft
Next


Cloud Governance
Kat Larsson
Search To-do List
Home
Workspace
Requests
New Request
New Request > Create Team
Step1. Request Info
Step2. Basic Info
Step3. Advanced Info
* Primary Team Contact
Kat Larsson
* Secondary Team Contact
Arymundo Pinto
* Team Owners
Kat Larsson
✓ Auditing Enabled
✓ Lease period of 6 months
✓ Option to extend lease by 3 months
✓ Recertify members every month
Define rules to populate team members dynamically
Enable hidden team membership to hide the members of the Office 365 Group from users who are not members of the team
Office 365 Team Policy
* Office 365 Group policy
Policy with Renew_Group Team

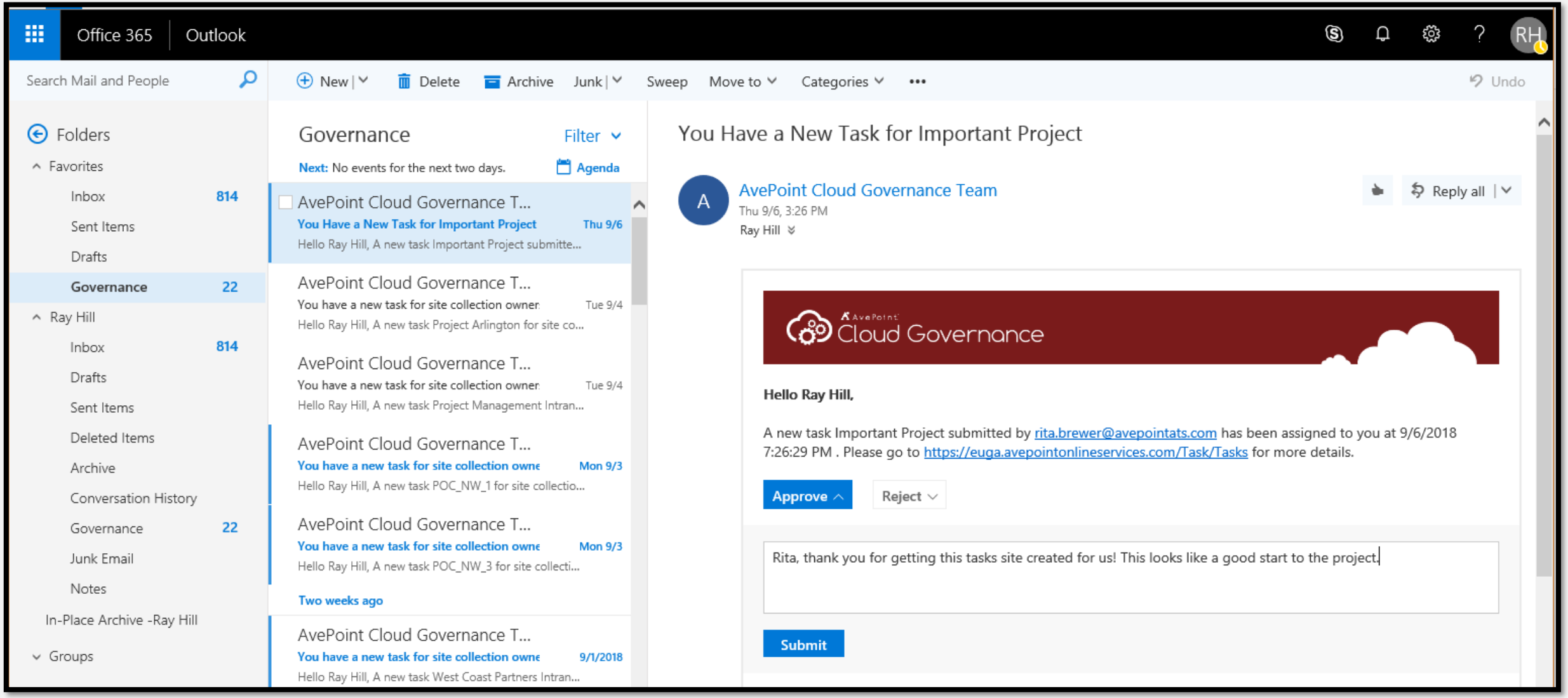

Cloud Governance
Kat Larsson
Search To-do List
Home
Workspace
Requests
New Request
New Request > Create Team
Step1. Request Info
Step2. Basic Info
Step3. Advanced Info
Team Members Permissions
Allow members to create and update channels
Allow members to delete and restore channels
Allow members to add and remove apps
Allow members to create, update, and remove tabs
Allow members to create, update, and remove connectors
Allow members to edit their messages
Guest Permissions
Allow guests to create and update channels
Allow guests to delete channels
Team Name
* Team Name
Contoso Research Project
* Team Description
Collaboration space to store documents and share notes related to Contoso project.

Request Approval & Automated Provisioning

Self service and automated provisioning based on business need

Ray Hill

Ray is Rita’s manager and receives an email requesting approval for her request



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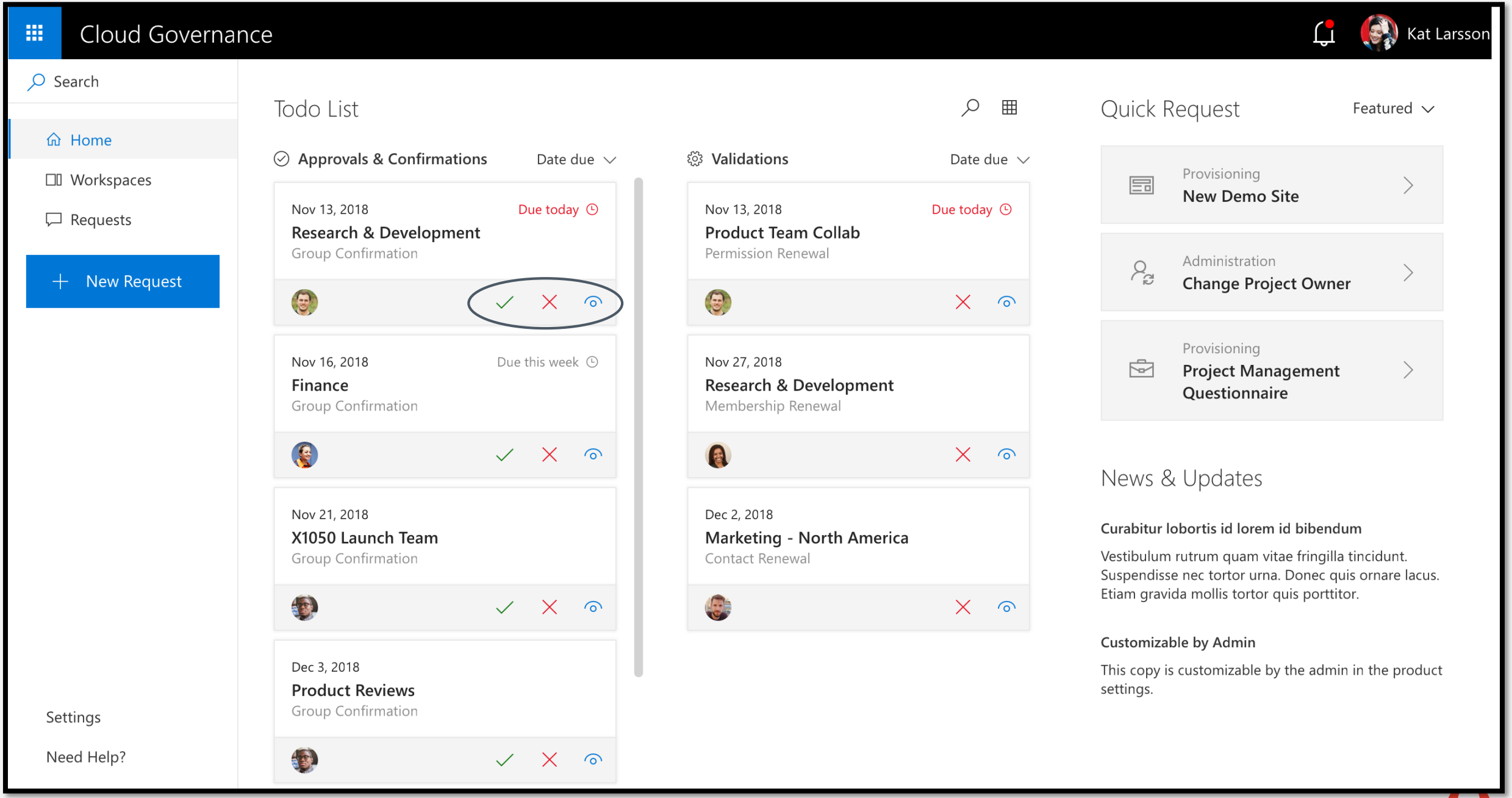

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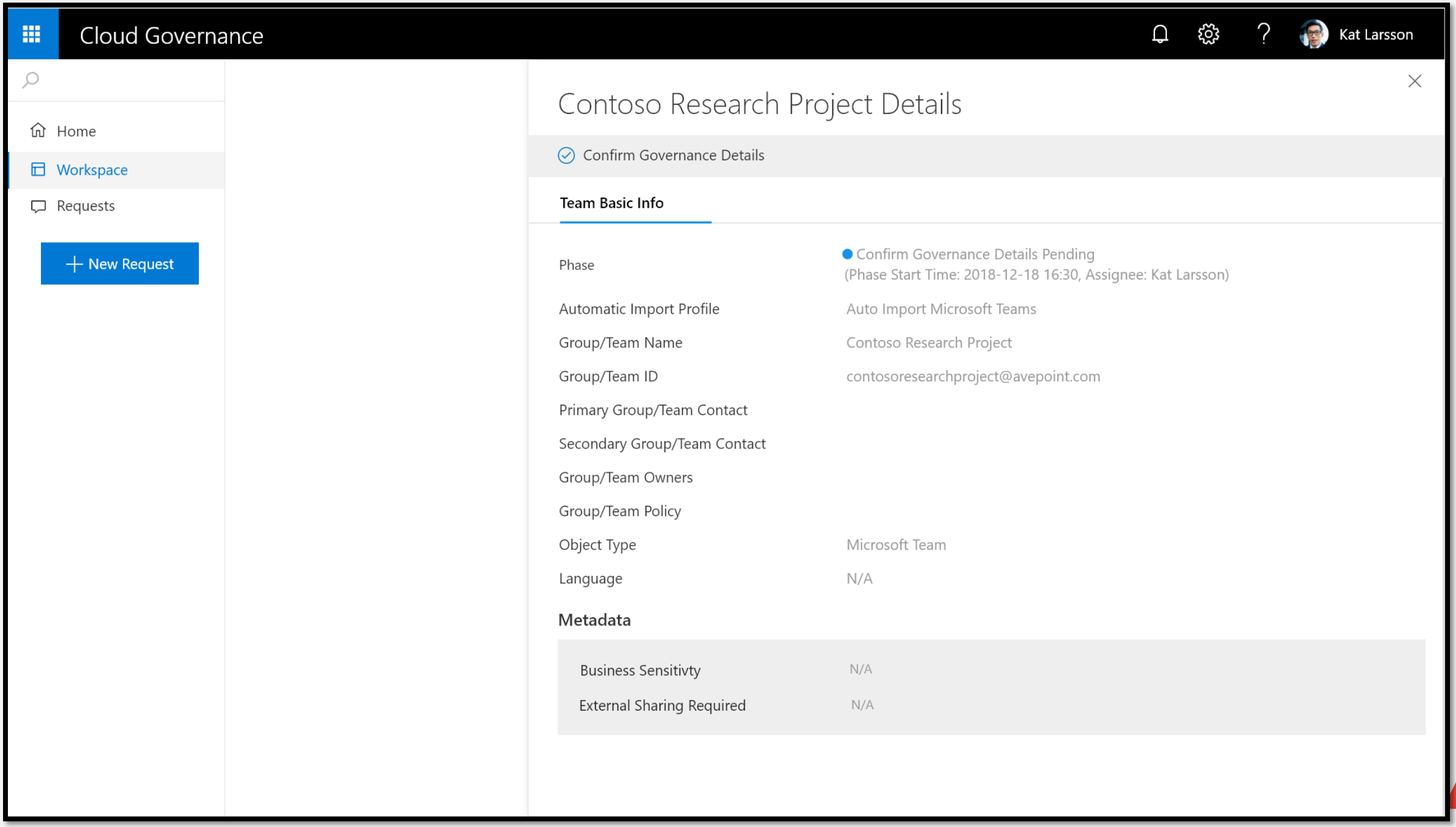
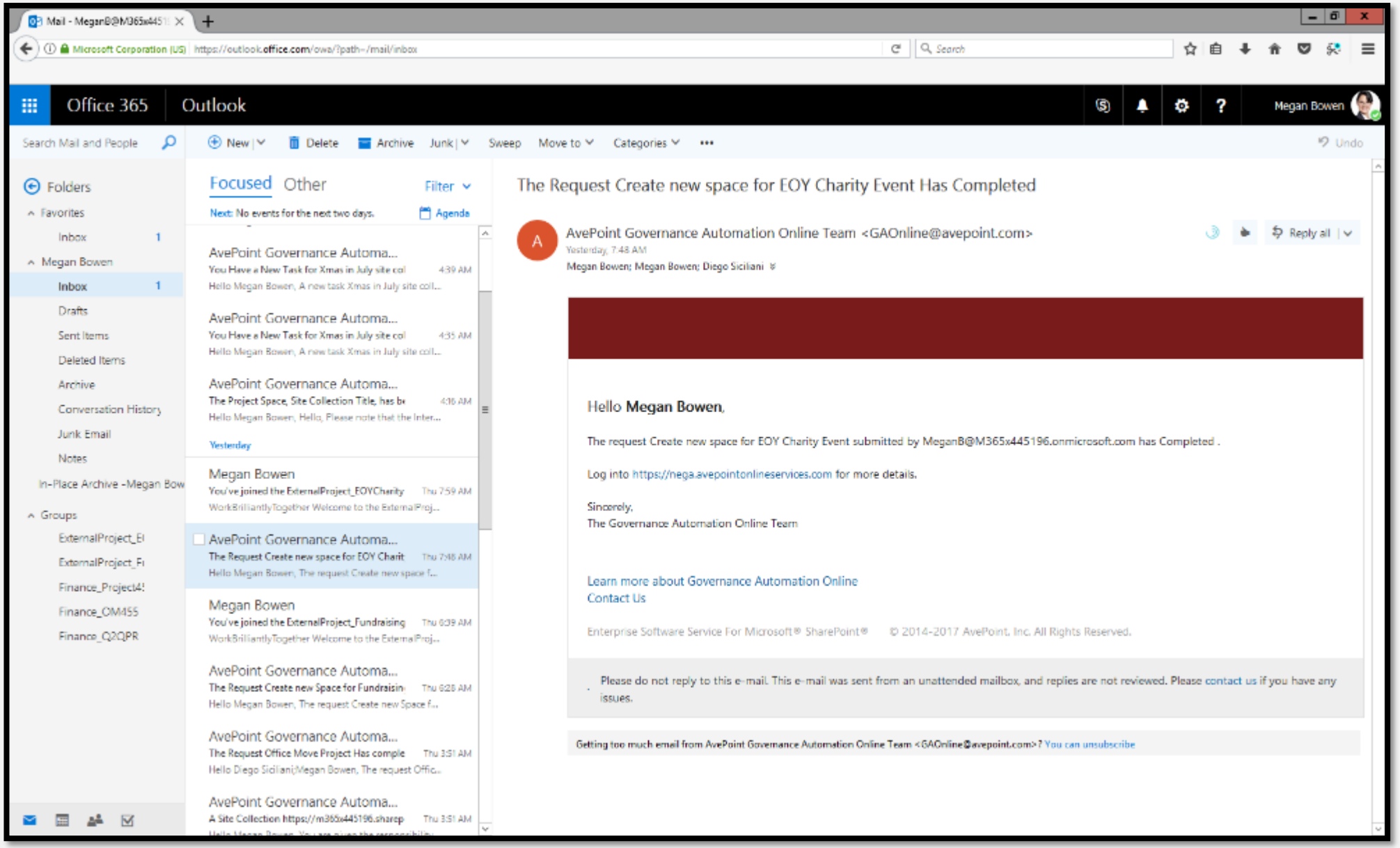

Cloud Governance
Kat Larsson
Home
Workspace
Requests
New Request
Contoso Research Project Details
Confirm Governance Details
Team Basic Info
Phase
Confirm Governance Details Pending
(Phase Start Time: 2018-12-18 16:30, Assignee: Kat Larsson)
Automatic Import Profile
Auto Import Microsoft Teams
Group/Team Name
Contoso Research Project
Group/Team ID
contosoresearchproject@avepoint.com
Primary Group/Team Contact
Secondary Group/Team Contact
Group/Team Owners
Group/Team Policy
Object Type
Microsoft Team
Language
N/A
Metadata
Business Sensitivty
N/A
External Sharing Required
N/A

Self service and automated provisioning based on business need

Rita Brewer

Rita receives an email to let her know that her new workspace is available. She's also provided a detailed report of what policies are applied within the workspace.



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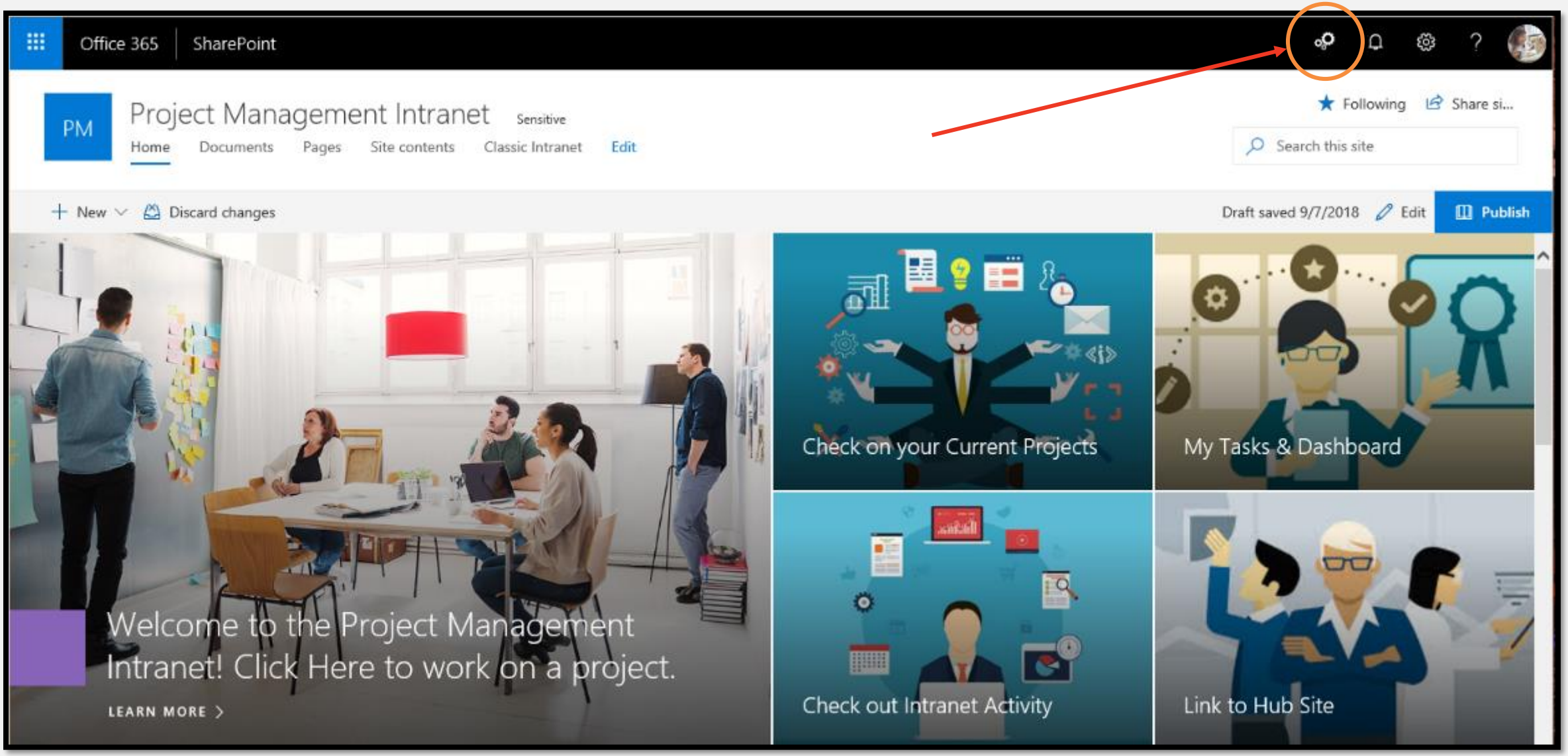

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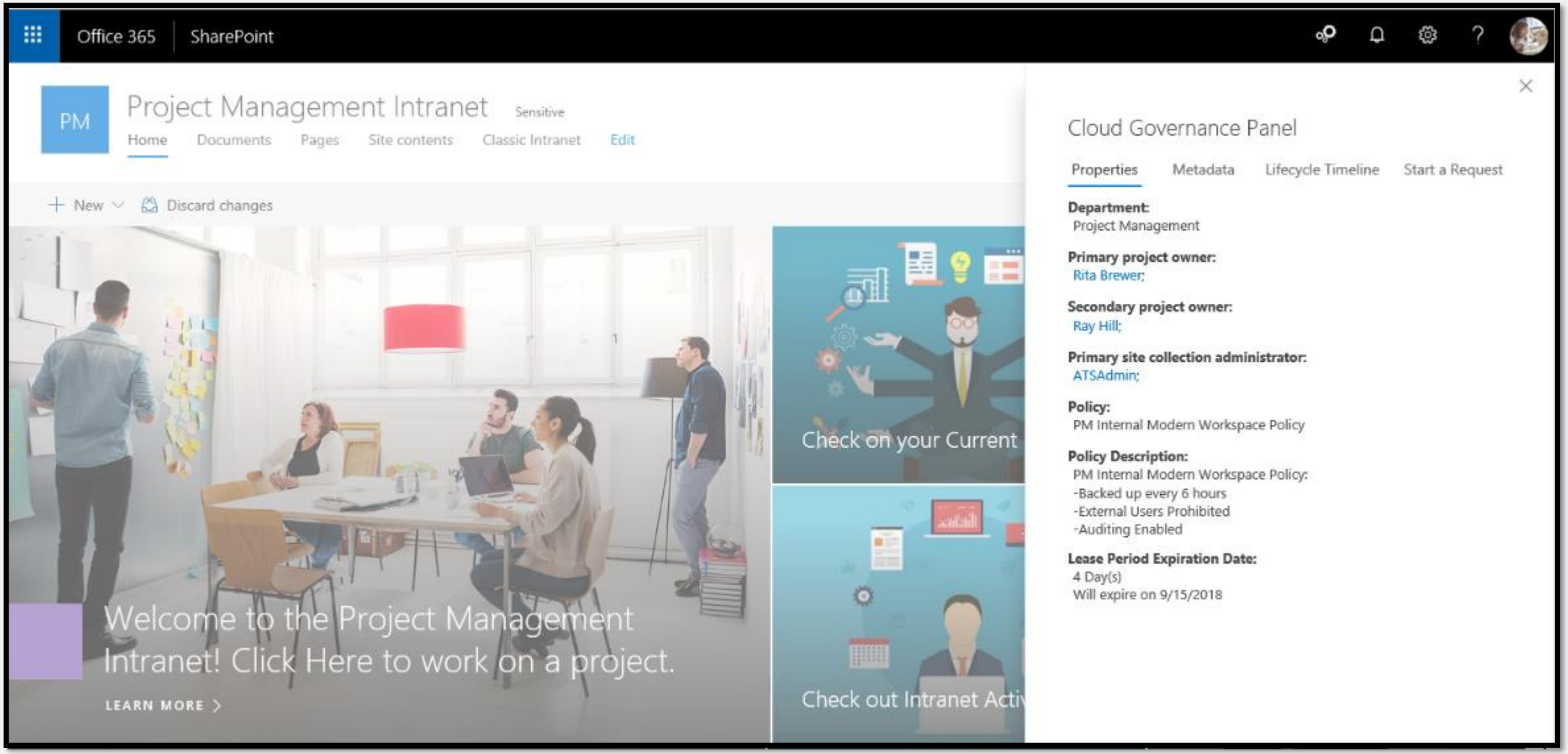

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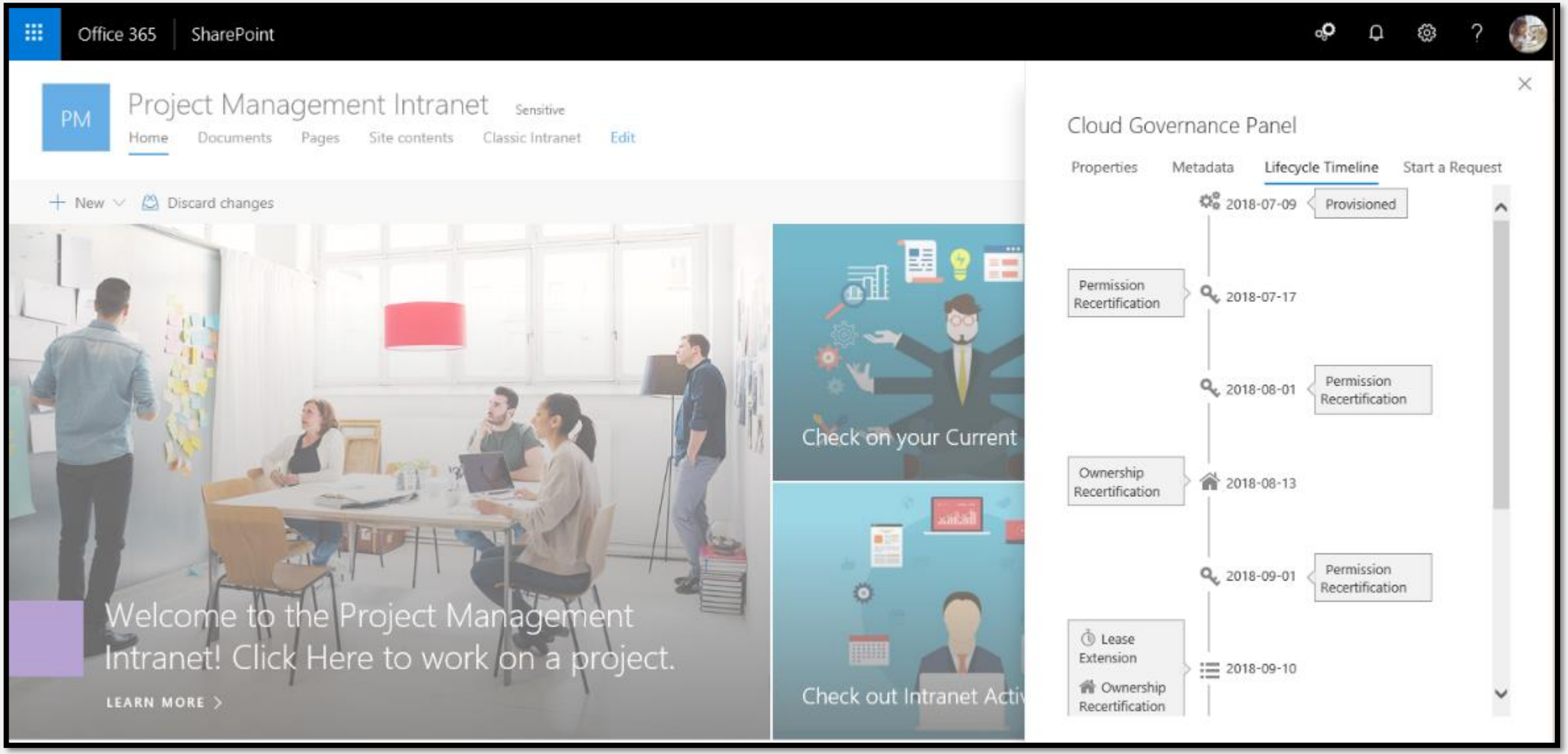

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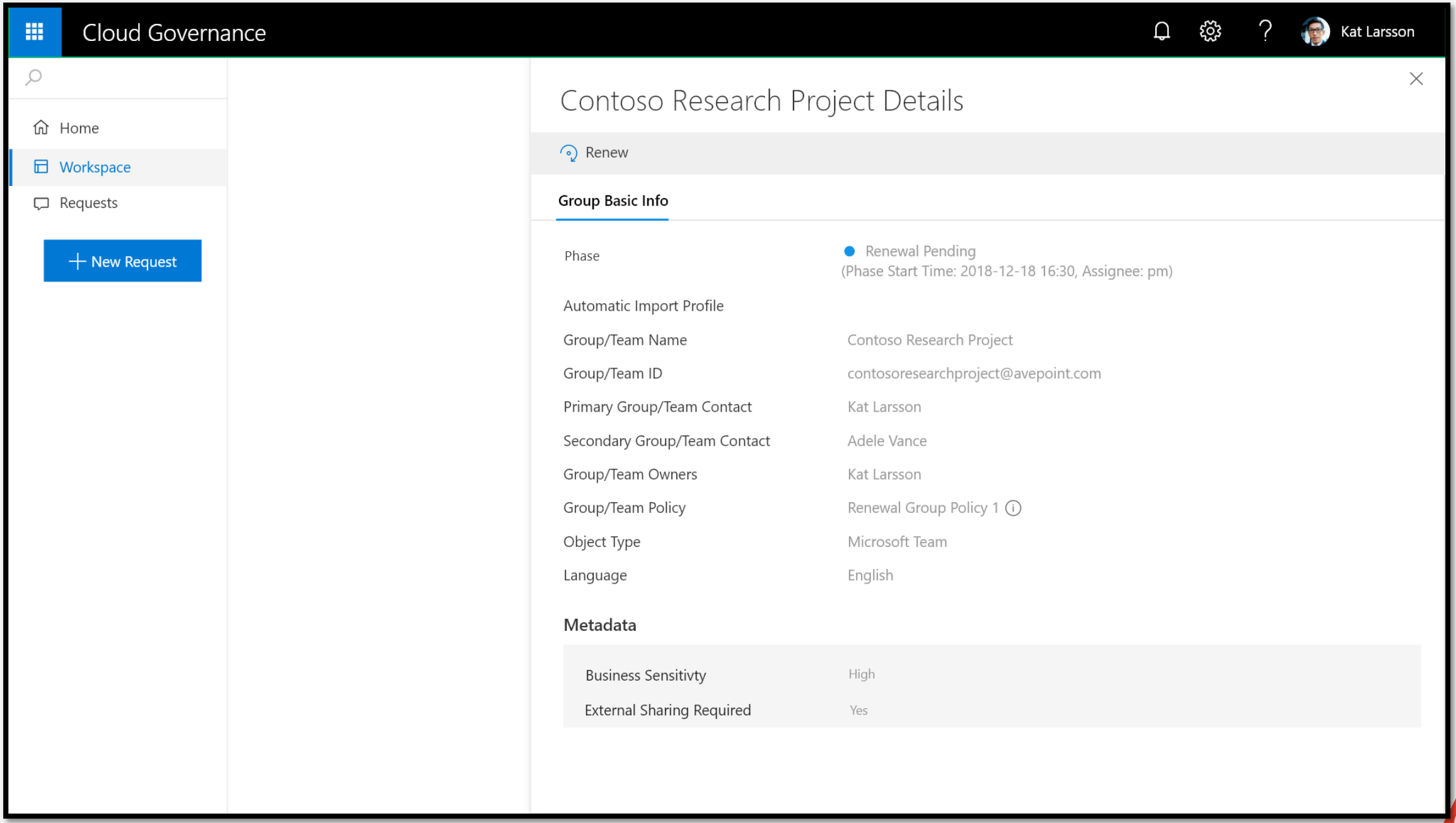
Recertification of Sites & Teams



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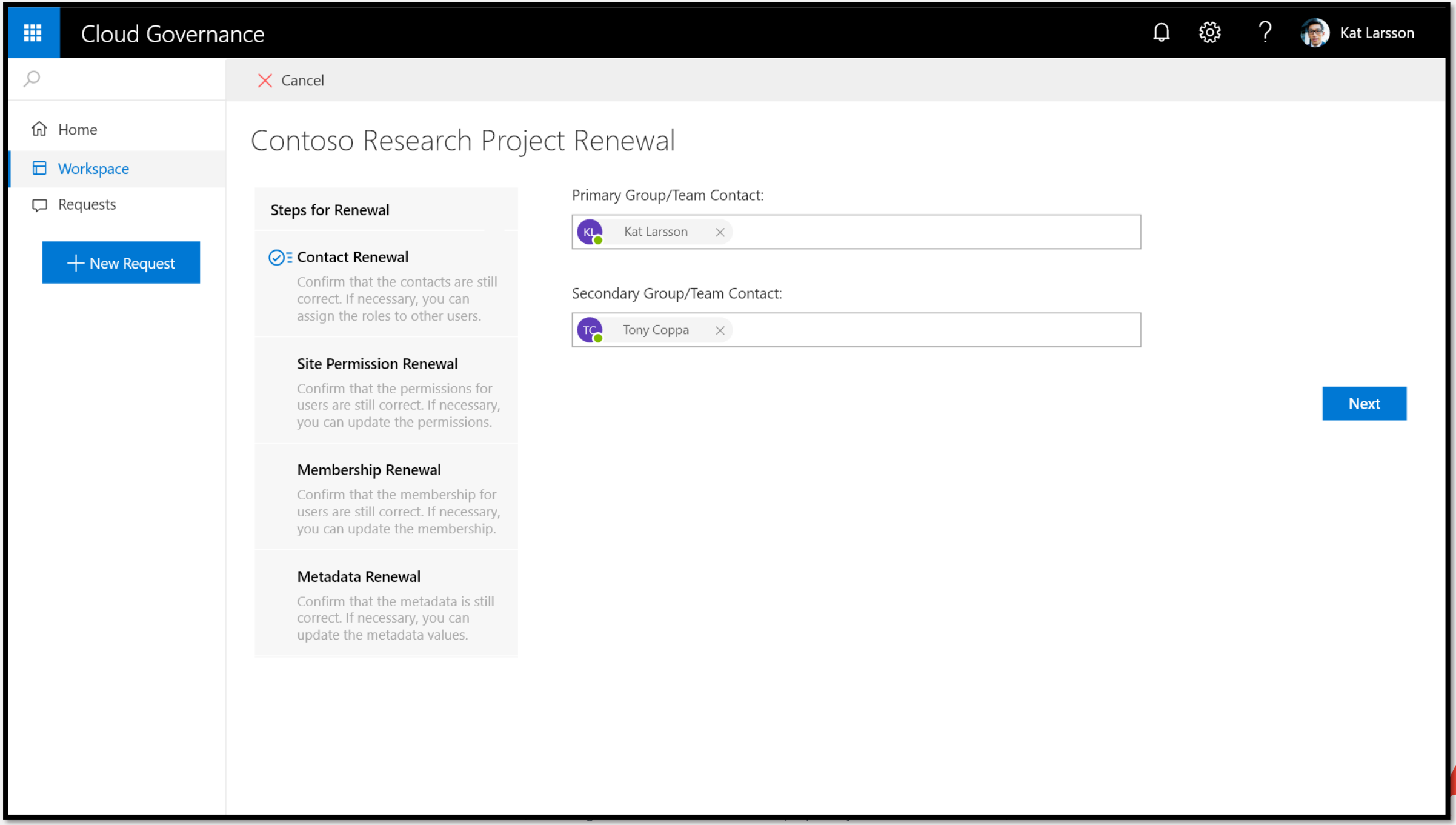
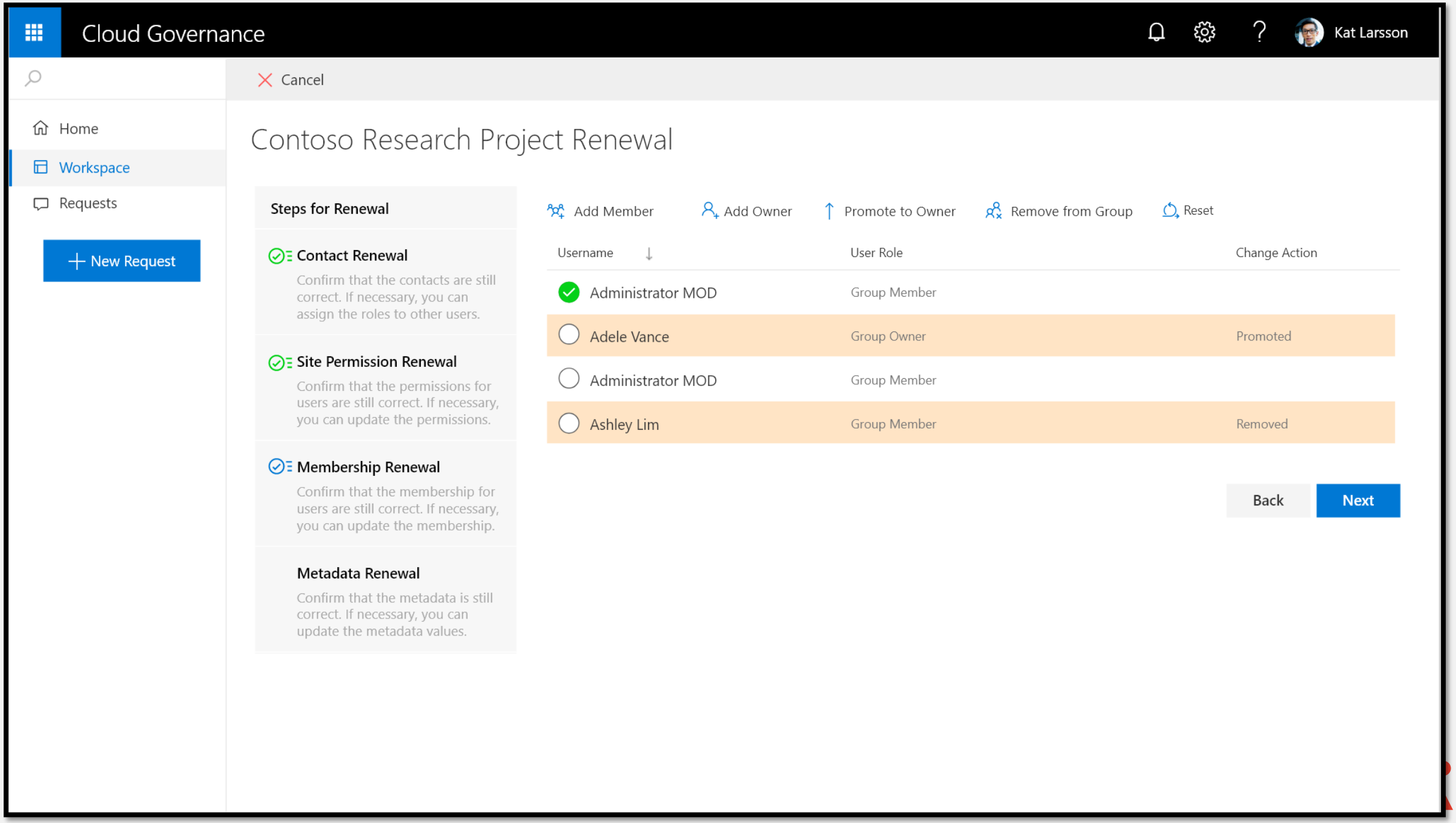

Cloud Governance
Kat Larsson
Cancel
Home
Workspace
Requests
New Request
Contoso Research Project Renewal
Steps for Renewal
Contact Renewal
Confirm that the contacts are still correct. If necessary, you can assign the roles to other users.
Site Permission Renewal
Confirm that the permissions for users are still correct. If necessary, you can update the permissions.
Membership Renewal
Confirm that the membership for users are still correct. If necessary, you can update the membership.
Metadata Renewal
Confirm that the metadata is still correct. If necessary, you can update the metadata values.
Primary Group/Team Contact:
KL
Kat Larsson
Secondary Group/Team Contact:
TC
Tony Coppa
Next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Membership Renewal
Confirm that the membership for users are still correct. If necessary, you can update the membership.
Metadata Renewal
Confirm that the metadata is still correct. If necessary, you can update the metadata values.
Add Member
Add Owner
Promote to Owner
Remove from Group
Reset
Username
User Role
Change Action
Administrator MOD
Group Member
Adele Vance
Group Owner
Promoted
Administrator MOD
Group Member
Ashley Lim
Group Member
Removed
Back
Next

What we covered

Establish a Sustainable Adoption Plan

5 Steps to educate users about Teams

Designing Governance Policy

90-Day Project Plan Template

How AvePoint Adopted Teams

Driving Sustainable Adoption

AvePoint Governance Examples

#shifthappens

DIGITAL TRANSFORMATION

FROM THE TRENCHES

Washington, D.C. | June 12-13, 2019

Let's Connect

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https://www.linkedin.com/in/justin-walker-49116451/
justin.walker@avepoint.com

Download workshop resources:
http://www.avepoint.com/speaking

thank you

Gracias	ευχαριστώ	Danke	Grazie	благодаря
Hvala	Obrigado	Kiitos	شكراً	Tak
Ahsante	Teşekkürler	متشكرم	Salamat Po	감사합니다
Cám ơn	شكريه	Terima Kasih	Dank u Wel	Děkuji
நன்றி	Köszönöm	ありがとうございます	ขอบคุณครับ	Dziękuję
谢谢	Tack	Mulţumesc	спасибо	Merci
תודה	多謝晒	дякую	Ďakujem	

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Strategies for Teams Adoption

Planning for 90 days to TEAMS Adoption

- Develop sustainable Teams training and adoption recommendation
  - Learning resources
  - Training Schedules that capture feedback from pilot users
  - Incentive models
  - Communities of practice
- Develop sustainable TEAMS support structure recommendations
  - Scalable support model
  - Core requirements and recommendations for a self-service portal
  - Identification of relevant tools

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First 3 Month Plan

Secure stakeholder engagement At

- Identify stakeholder's key business drivers.
- Share collaboration advantages beyond vs. File Sharing
- Create business value metrics

Update governance policies from pilot user feedback

- Guiding Principles
- Identify Corporate Governance needs.
- Define Sustainable Adoption Policy

Develop a holistic learning program

- Develop self service learning resources
- Implement a mentoring program for your users.
- Partner with HR\Training resources to

Develop a one-stop, interactive, self-service support portal

- Provide relevant information to inform users about:
  - Purpose of SharePoint as a collaboration platform
  - Latest updates and announcements
- Site creation request

Establish and facilitate communities of practice

- Vision is for two-way communication
- Solicit feedback and foster conversation from employees
- Have user contributed/generated info and content
- Provide schedules for upcoming events

Formulate and execute launch campaign

- Intent is to drive excitement and engagement
- Partner with corporate communications and branding team
- Showcase the value and benefits
  Provide clear schedule, and call to action

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First 3 Month Plan

Secure lasting mid-management engagement

- Identify mid-management key business pain points and priorities.
- Educate value beyond file sharing and WCM
- Formulate business value metrics
- Solicit support and resource commitment

Update enterprise collab and governance strategy

- Vision and Objective
- Guiding Principles
- Key Corporate Goals
- Well-defined R&R
- Management Policies
- Design Standards/Administration Process and Policies
- Training and Sustainable Adoption Policy

Develop a holistic learning program

- Define training goals
- Design a holistic multi-model learning path
- Partner with HR/Training to centralize training
- Develop self-service learning resources
- Implement a coaching/mentoring program
- Implement a community-based learning resource

Develop a one-stop, interactive, self-service support portal

- Provide relevant information to inform users about:
  - Purpose of SharePoint as a collaboration platform
  - Latest updates and announcements
- Site creation request

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Next 6-12 Month Plan

Measure adoption success criteria

- Based on initial value metrics discussed with mid-management, revisit and measure if business value has been met
- Identify new business value opportunities and define metrics

Update self-service portal

- Gather feedback and enhance self-service portal
- Continuously add more learning resources and content
- Provide more relevant reusable business solutions

Engage stakeholders and partners to drive awareness

Formalize relationships with:

- Corporate communications
- Branding team
- Other relevant groups

to continuously drive excitement.

Grow communities of practice

- Extend communities of practice beyond site owners / power users
- Introduce special business interest groups
- Identify champions
- Expand UI coach/mentor program

Increased global engagement

- Develop region specific communities
- Provide region specific support
- Provide region specific learning and training resources

Use an automated solution to implement governance policies

Policy Application

Apply the proper data and operational governance policies into the new source destination

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