



Why does adoption matter?

The business landscape is changing. Employees seek purpose and satisfaction. Employers aim to harness worker ingenuity. And a diverse, multi-generational workforce can now work anytime, anywhere. Success depends on your ability to collaborate and drive productivity within teams spread across the globe. We created Microsoft 365 to meet these evolving business needs. It is a suite of powerful tools that optimize productivity in today's corporate landscape.

We understand that adopting new technology involves change, and change can be daunting. Even for the most innovative, cutting-edge organizations. **That's why we created the Microsoft 365 Adoption Guide.**

We've compiled an easy-to-follow how-to guide that walks you and your team, step-by-step, through the best way to roll out Microsoft 365 to your organization. The insights we share come from our most successful customers, who have maximized the power of their investment, adopting multiple, integrated technologies that now form Microsoft 365. Throughout this guide you will find links to additional tools and resources as well as the <u>Adoption Planning Workbook</u> where you can build your custom approach to adoption.

Remember, you are not in this alone. There are many organizations who are currently launching Microsoft 365 technologies and you can connect with them in the <u>Driving Adoption Community</u>.

The way we work is becoming more connected, let's connect the way we work.



The successful adoption of new technology requires behavior change. And change can be hard.

It takes more than learning a new app. It's a fundamentally different way of working.

This change is about people. And we're here to help.







We know from experience...

- Change doesn't happen automatically. Most employees don't want to use new technology rolled out by their organization.¹
- o **CEOs matter.** When the CEO was engaged, the transformation project was more successful.²
- Setting targets is key. A well-defined set of financial and operational targets is a key component to successful transformation.³
- Learn from each other. Learning from co-workers is one of the most effective ways to adopt new technology.⁴

Creating organizational transformations, July 2008, McKinsey Quarterly, www.mckinsey.com

²⁾ SharePoint End-User Study, Apr 2013, Microsoft Corporation

³⁾ Microsoft 365 Usage Research, May 2016, Microsoft Corporation

⁴⁾ CIO Executive Board Business Productivity Databas



And we realize there are hurdles...

Launching a new technology is more than a technical migration

Resistance to change is a normal human behavior that needs to be addressed

Employees continue to use technical solutions that are not deployed by IT

80% of end users admit to using their communication tool of choice¹

Technical readiness and user readiness must go hand in hand

Plan, pilot and deploy both readiness activities together

Your adoption approach can accelerate or impede results

Understand team member personas in order to sell the value of the technology to users



Our successful customers navigate adoption by...

- Defining a vision. Companies were most successful when they had a clearly defined vision and knew how the new technology would be used.
- Getting leadership support. Successful projects obtained proactive support from senior leadership to encourage new technology use.
- Training end-users. Organizations used multiple training formats to engage with employees across business units.
- Raising awareness. Top performers used email, employee portals, posters, teaser videos, and newsletters.



Our Adoption Framework guides you through the process and helps optimize results

We have created an easy-to-follow framework to guide you through the adoption process. Each phase is broken into simple steps that guide you to the best practices, resources, and tools you need to build and deploy a customized adoption approach.



ENVISION

Identify and prioritize scenarios while learning about available resources as you plan for rollout. This stage is critical to your journey as you're setting business goals to measure success.

- Assemble Your Team
- o <u>Define Business Strategy</u>
- o Determine Readiness



ONBOARD

Work with your key stakeholders to build and launch your adoption plan. Prepare your environment and test your adoption approach with Early Adopters. Use feedback to make adjustments before scaling to the business.

- Prepare Your Environment
- o <u>Build Your Adoption Plan</u>
- Launch to Early Adopters
- o Adjust Your Plan



DRIVE VALUE

Full-scale deployment and business success depend on usage and satisfaction. This requires planning through the Envision and Onboard phases plus ongoing operational excellence.

- o <u>Monitor End User Adoption</u>
- o <u>Measure and Report Usage</u>
- Encourage Ongoing Engagement



Phase One: ENVISION



ENVISION

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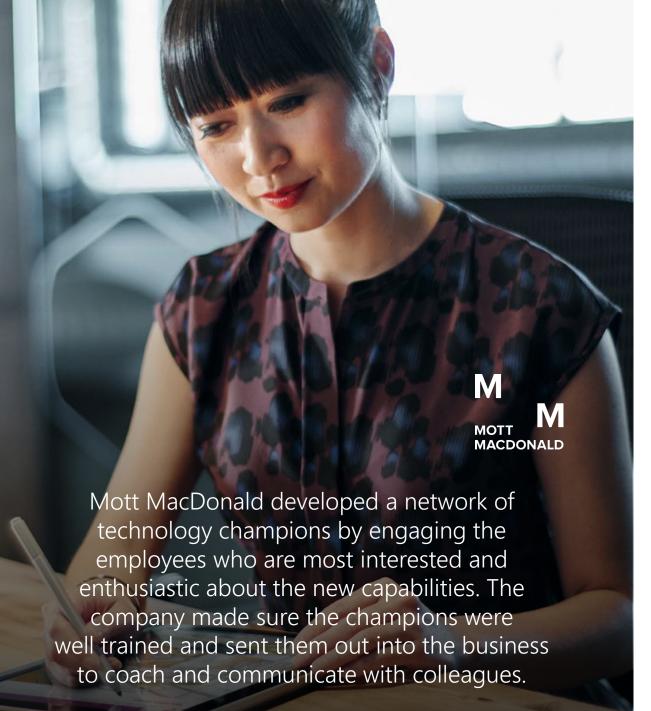




Transforming to this new way of working requires buy-in and support from across the business. We have identified four key groups who will bridge technology and business outcomes that matter to your organization

Each group has a specific role in implementation and should be engaged early and often. The next few pages will outline the specific role these team members will play.

- 1) Executive Sponsors
- 2) Success Owner
- 3) Early Adopters
- 4) Champions







How can Executive Sponsors drive project success?

Executive Sponsors should:

- Help the project team identify and prioritize their top business needs.
- Play a role in communicating the vision to leaders across the organization.
- Actively participate in and use the Microsoft 365 capabilities to help drive and reinforce adoption.
- Promote the adoption process. Studies show that 87% of successful transformation projects had visible engagement by Executive Sponsors.

Ensure they understand the ABCs:*

- Active and visible participation
- Building a coalition with their executive peers
- Communicating directly with employees

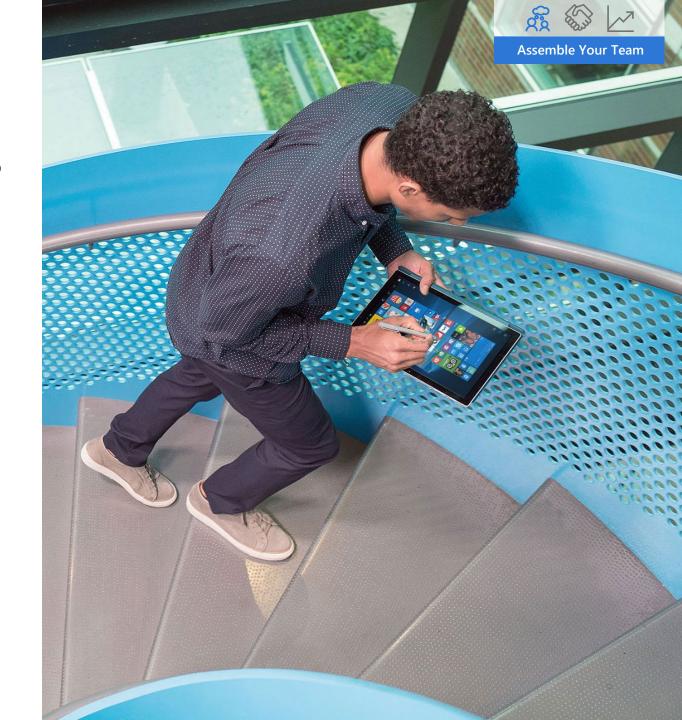


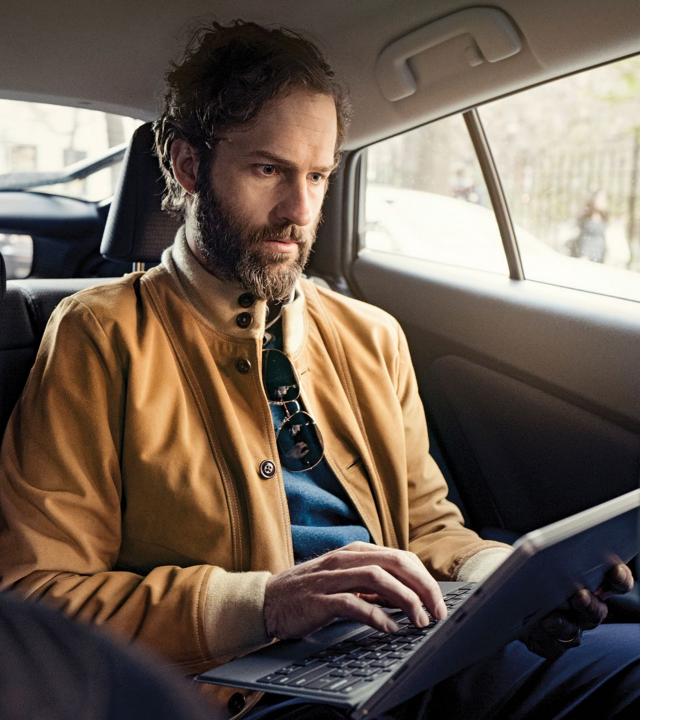
Who are Success Owners and why are they important?

Success Owners ensure business goals are realized by helping people use and get value from the new Microsoft service.

Success Owners should:

- o Identify and engage the right stakeholders.
- Translate the organization's set business goals into Microsoft 365 scenarios.
- Create an adoption plan to drive usage and realize value from Microsoft 365.
- Ensure communications and training are successfully implemented.









Who are Early Adopters?

Selecting the right participants for the Early Adopter Program is key to gain valuable insights and inform the organization-wide launch.

The list below describes the types of employee to include in your program:

- O Users from different lines of business and departments, preferably those that work together on a project or business process.
- Likely Champions or leaders who will become advocates during the broad launch to the entire organization.
- Users who typically struggle with technology. It's important to understand and address their needs during launch.
- o IT and help desk team members who will support users during launch.
- o Important: Leave out the CEO and upper management. While it can be tempting to ask for the CEO's involvement, keeping them out of the Early Adopter Program provides an opportunity to smooth out any issues before they are exposed during the rollout.



We connect with an adoption Champion in each business unit, who sends out weekly emails on Office 365. Each Office 365 tool has core benefits and by taking users on a smooth journey through them, we are able to unlock the value in each one.

Nick Lamshed Change Consultant, Qantas





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.

Champions will:

- o Create the groundswell of enthusiasm that grows adoption.
- Build a circle of influence among their teams.
- Bring the new ways of working to life across teams.
- Identify business challenges and possible solutions.
- Provide feedback to the project team and sponsors.
- Reduce strain on core project team through active, ongoing engagement.





Other 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. Visit the <u>Adoption Team Member Role Details</u> for complete descriptions.





Define your business strategy

Partner...

with your core team to refine your objectives.

Identify...

the important business objectives and challenges and start to recognize areas of opportunity to improve work processes.

Host a workshop...

to delve deeper into current challenges, strategies and goals. Include department leads, lines of business, IT and other stakeholders who can help brainstorm how Microsoft 365 can be used in your organization.

Consider these questions to drive the conversation:

- What are some of the organization's challenges or pain points related to communication and collaboration?
- What are the areas in which your organization would like to improve?
- What are the organization's strategic initiatives or current transformation projects that Microsoft 365 can support?
- What methods of communication and collaboration are typically better received by your organization than others?
- What is the process for drafting, distributing, and sharing information?





Identify your Scenarios

What is a Scenario?

Scenarios cover the ways your people will use Microsoft 365 to address business challenges and achieve organizational, cultural, tangible or individual adoption outcomes.

Why are Scenarios important?

- They allow teams to understand how Microsoft 365 can help them achieve more.
- They act as input and validation of Microsoft 365 awareness messaging.
- They support awareness and readiness activities by putting products in context; people will know when and how to use them.

Explore what's possible.

The Microsoft 365 Productivity Library is a collection of recommended use cases to showcase ideas on how to use the products to your best advantage in a way that's relevant to you.

The idea cards speak to everyday challenges you can solve with Microsoft 365 across industries and roles and includes short training videos.

You can search the cards by Industry, Role or Product, or any keywords fitting your needs.

Get started:

aka.ms/productivitylibrary





Create scenarios for multiple teams and departments

You can use the worksheet below to document business scenarios for specific departments and then capture your scenarios in the Adoption Planning Workbook.

As someone in...

(Team)



I want to...

(Description of what I want to do)



Using...

(Specific application of the technology)



I'll know this is successful when...

(Solutions success measure)



As someone in

Sales Management

I want to

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

Using

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

I'll know this is successful when

my sales team creates proposals more easily, giving them more time to close deals



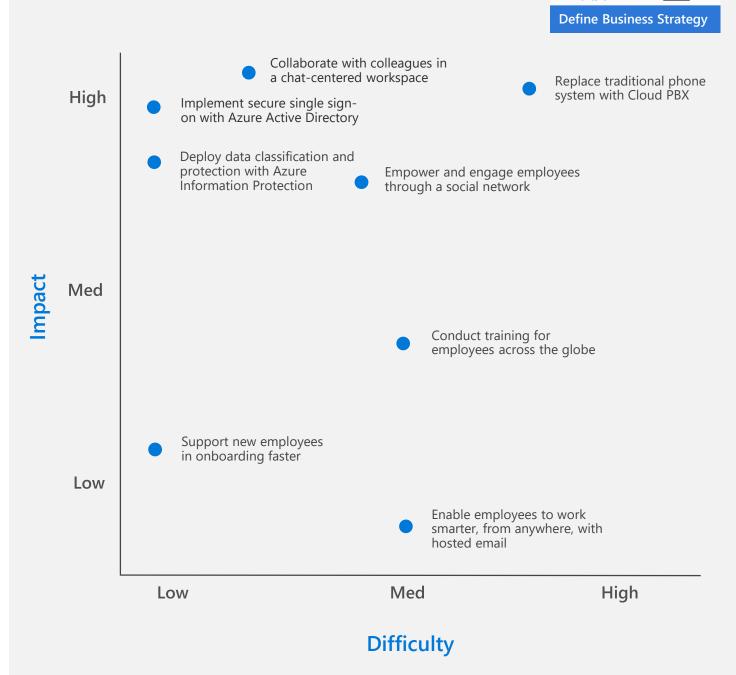


Gauge impact and difficulty

Once scenarios have been defined for the organization and its departments, it is important to prioritize, so you know where to focus first.

Gauging impact and difficulty will help you understand which scenarios will provide the most impact the fastest and which require more planning.

Use this template to prioritize your scenarios in the <u>Adoption Planning Workbook</u>.





Remember to consider service strategy

Define your "Minimum Viable Experience" for your user base. These are the must-have capabilities your services need to deliver. Doing this early will allow you to control the scope of your pilot and deployment phases.

- Scope change to empower, not disrupt business users.
- One large, phased transition is often better than multiple small ones.
- Each type of service strategy requires all the components of deployment and adoption planning.









Define your success criteria

- Identify key performance indicators (KPIs) that should improve based on adopting various business scenarios.
- Establish KPI benchmarks and users' Microsoft 365 knowledge.
- o Choose criteria to help you show leadership the impact Microsoft 365 is having on the organization.
- After rollout, use the end user surveys to measure satisfaction and progress against your benchmark. http://aka.ms/usersurveys

View sample KPIs in the Adoption Planning Workbook





Use these examples to choose your KPIs

Choose criteria to demonstrate the impact of your Microsoft 365 implementation against each success measure. We have provided ideas below and scorecard templates in the Adoption Planning Workbook for you to effectively track and report success.

Success Measure	Method	Example Goal
Reduced operating costs Increased adoption correlates to reduced third- party conferencing usage, travel time and resource allocation	Quantitative Microsoft 365 reporting Finance/accounting reports Travel and phone expense reports	Comparison of pre and post Microsoft 365 reports will show cost savings. Post rollout usage of third-party phone conferencing should show decreasing usage of 10% per month
Increased productivity Increased adoption correlates to faster communication and decision making, shorter time to complete tasks	Quantitative Process efficiency gains Qualitative End user surveys Yammer or Teams feedback	Time to complete customer orders drop by 15% within 6 months
Improved collaboration Increased cross-team and cross-location communications	Qualitative End user surveys	Increased usage of Yammer or Teams
Improved employee engagement Employees are fully absorbed by and enthusiastic about their work and are more motivated to help the organization achieve its goals	Qualitative Employee surveys	Employee engagement improves by 15% within 6 months of rolling out Yammer or Teams





Determine your organization's readiness

What is Readiness?

Willingness and preparedness of your users and your organization to move to Microsoft 365

- Every organization approaches change differently, depending on region, work style, professional profile, and other elements of the organization.
- Determine how receptive (or not) your users are likely to be to changing the way they work and adopting new technology.
- You will need to create a rollout plan that reflects the readiness of your organization.

Resistance is normal. Anticipate and plan ahead!

Readiness factors

- There are key factors that will help you understand how prepared your organization is for the transition to Microsoft 365
 - Clear vision for the company shift
 - Clear vision for the individual shift
 - Amount of overall change required
 - Executive alignment

Different groups within your organization will have different levels of readiness and change appetite.

Use the <u>Adoption Planning Workbook</u> to assess your organization.



Phase Two: ONBOARD



ONBOARD

Work with your key stakeholders to build and launch your adoption plan. Prepare your environment and test your adoption approach with Early Adopters. Use feedback to make adjustments before scaling to the business.

- o <u>Prepare Your Environment</u>
- o <u>Build Your Adoption Plan</u>
- o <u>Launch to Early Adopters</u>
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Technical Readiness is key to ensuring your organization is ready for launch. Use this checklist to identify items that need to be completed before go-live.

Need more help? Review the <u>Technical</u> <u>Readiness and Governance Guide</u> and complete your own Checklist in the <u>Adoption Planning Workbook</u>.



Technical Readiness Checklist

☐ Complete legal & security review
☐ Review service capabilities with legal & security teams
☐ Decide guest access and provisioning policies
☐ Whitelist Microsoft 365 URL's & IP addresses
☐ Implement enterprise policies and Microsoft 365 group governance policies
☐ Assign report reader roles
☐ Complete network assessment (for Voice & Video services)
☐ Plan guest access bandwidth
 Review minimum requirements spec, including mobile devices strategy
☐ Review Microsoft 365 Admin reporting
☐ Assign report reader role as needed
☐ Prepare help desk



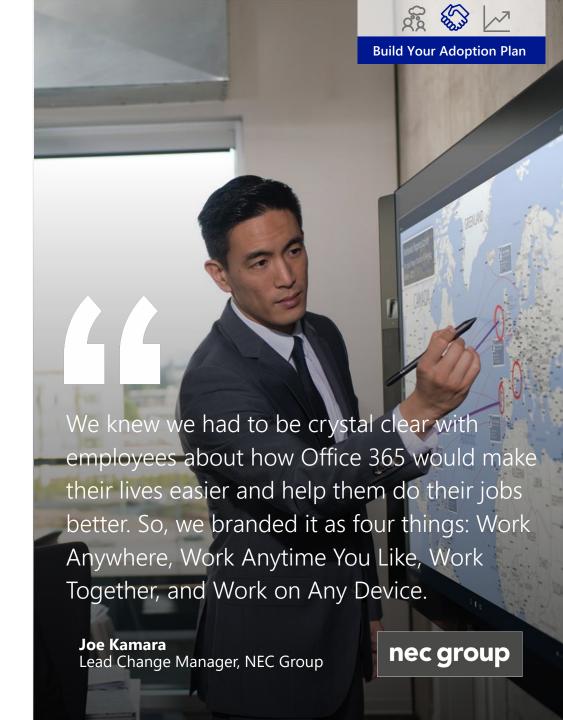
Drive awareness through end user engagement

Communications

- Deploy a variety of tactics
- o 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
- o Place demo booths in cafeteria/foyer
- Host online events for remote offices

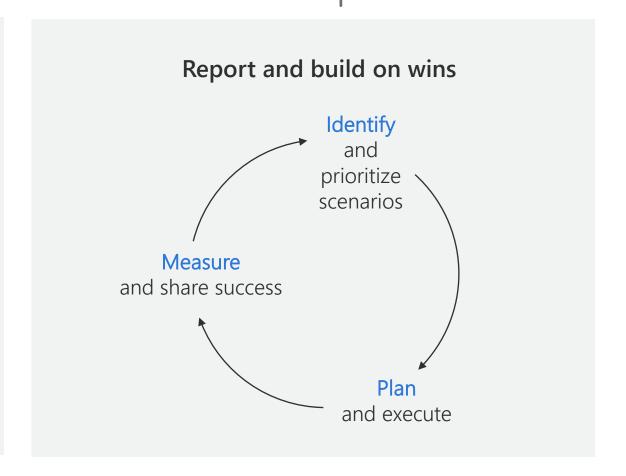


Communicate value to the business through scenarios

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







Incorporate success stories

Success stories are often just as valuable as quantitative measures when demonstrating Microsoft 365 success.

Throughout the rollout, project team members and Champions should identify examples that demonstrate crossfunctional collaboration and teamwork and share them by using Yammer or Teams.

Leverage these examples in your communications to generate excitement and demonstrate the impact of Microsoft 365.

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.





Create launch events

The following are some resources, ideas, and tactics to help create an effective Microsoft 365 launch:

- Planning Team and Champions wear Microsoft 365 T-shirts, order at https://www.co-store.com/iw (US customers only).
- Microsoft 365 banners, posters, and leaflets displayed throughout the offices.
- Demo booths in cafeteria/foyer to showcase the various Microsoft 365 tools and features, and to provide hands-on experience.



How to choose your launch event

- Consider your goals for using Microsoft 365. How can your launch event support your business objectives?
- **Consider your company culture.** What types of activities will resonate with your leadership and your employees?
- **Consider your time and resources.** Can you mix and match activities to plan something that suits your needs and fits into your schedule?
- Consider existing company events. Is there an upcoming company event near the roll-out of Microsoft 365 that could incorporate your launch?

Develop your communication strategy

Develop a communications strategy that will generate awareness and excitement before the launch and share usage success after launch. Consider the following best practices when building your approach:

- o Ensure staff are considered when putting together the messaging to help them identify, "What's in it for me?"
- o Pick a mix of activities including email, posters and physical events, and plot them along the project timeline.
- o Schedule events where people can experience the products and ask questions.
- o Tailor activities for driving awareness to company and culture.
- Having a leader send out a communication announcing Microsoft 365, hosting a launch event, or sharing the benefits during an all-hands meeting will go a long way in validating its importance and getting everyone on board with using the new technology.

Complete the Communications Assessment and use planning templates in the 🗎 Adoption Planning Workbook.



Access helpful communication resources

Explore free online templates and tools for engagement content that you can include in your communications.

Check in with the <u>Driving Adoption Tech</u>

<u>Community</u> to connect with adoption experts and learn how they have communicated the Microsoft 365 launch to their organizations.

Use the <u>Adoption Planning Workbook</u> to organize and track content.

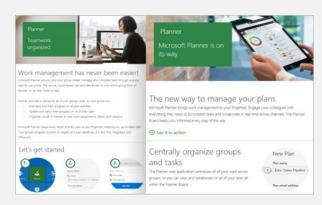


Posters, booklet and print



https://aka.ms/AwarenessTemplates

Countdown and Announcement emails



https://aka.ms/AwarenessTemplates



Build your training strategy

Focus on the why

Make sure employees know why the change is happening, what's in it for them, and why they're being asked to change.

Use real work scenarios

Use tasks or business processes that are familiar to your audience to draw them into learning how to use the technology.

Use multiple formats

Training end users should take on multiple forms to accommodate different learning styles, geographical barriers and resource constraints.

Reinforce

Make the training stick with reinforcement options like on-demand training, lunch and learn sessions, and new employee training options.



Consider training best practices

When you are putting together your training program, take into consideration:



The current productivity tools you are running

If you are currently running a productivity system, you may need to spend an increased effort in the training stage, as it will require a change in behavior.



The technology literacy of the staff

You need to understand how tech-savvy your staff are when planning your training program. This will help to determine how easily they will pick up new ways to work.



The current change programs

It is important to understand what other programs are currently running in the business, so do not overwhelm or confuse your staff.

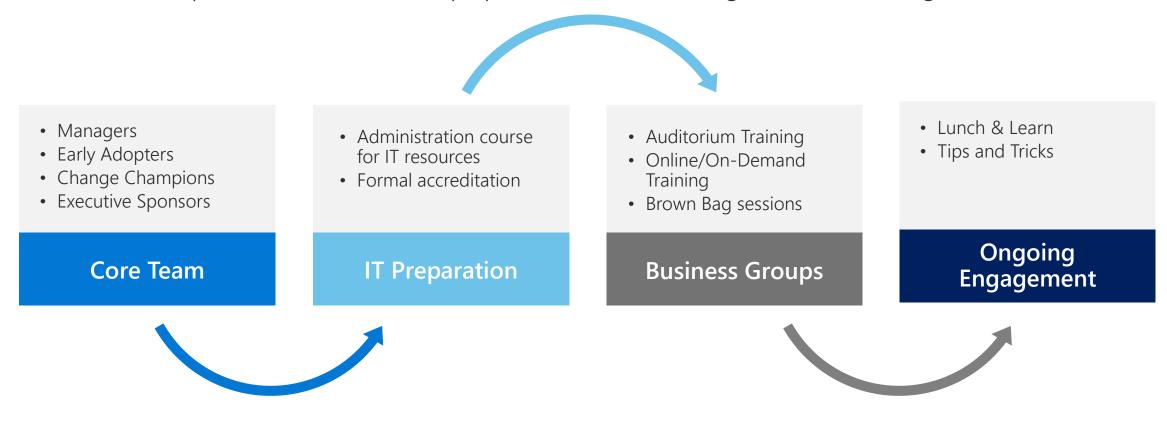


Training preferences of your staff

It is important to understand the best way to deliver training to your organization, whether it be in person, through assisted or unassisted online tutorials, or other methods.

Align your training strategy to the launch plan

Design your training strategy to scale with your launch. Start with the groups that will champion Microsoft 365, then prepare IT, before launching to the broader organization.



Use the Adoption Planning Workbook to assess the training needs of your organization and build your approach to training.



Access free online training resources to help launch Microsoft 365.

Check in with the <u>Driving Adoption Tech</u>
<u>Community</u> to connect with adoption experts and learn how they have communicated the Microsoft 365 launch to their organizations.

Use the <u>Adoption Planning Workbook</u> to organize and track content.





Build Your Adoption Plan



Microsoft 365 Training Center

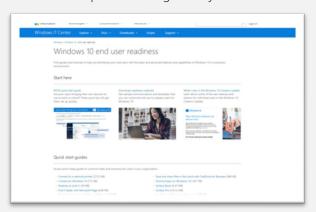
Product based training to help ready people to use the services and apps effectively.



office.com/training

Office Quick Starts

Get up and running quickly with the basic info you need to be productive right away.



Office 365 Quick Start Guides

Productivity Training

Scenario based training to ready people to maximize their productivity with Microsoft 365.



http://aka.ms/productivitytraining

Microsoft 365 YouTube Channel

Discover how Office 365's integrated experience can help you grow your business.



https://www.youtube.com/user/officevideos





Build a sustainable Champions Community

Champions help build, grow, and sustain your Microsoft 365 rollout by evangelizing and helping their peers with the new technology.

Get started:

Microsoft has built a <u>Champions Guide</u> to help you launch your community.

Get inspired:

Best Buy: The rise of the ninjas—a SharePoint 2013 user adoption story (SPC296)

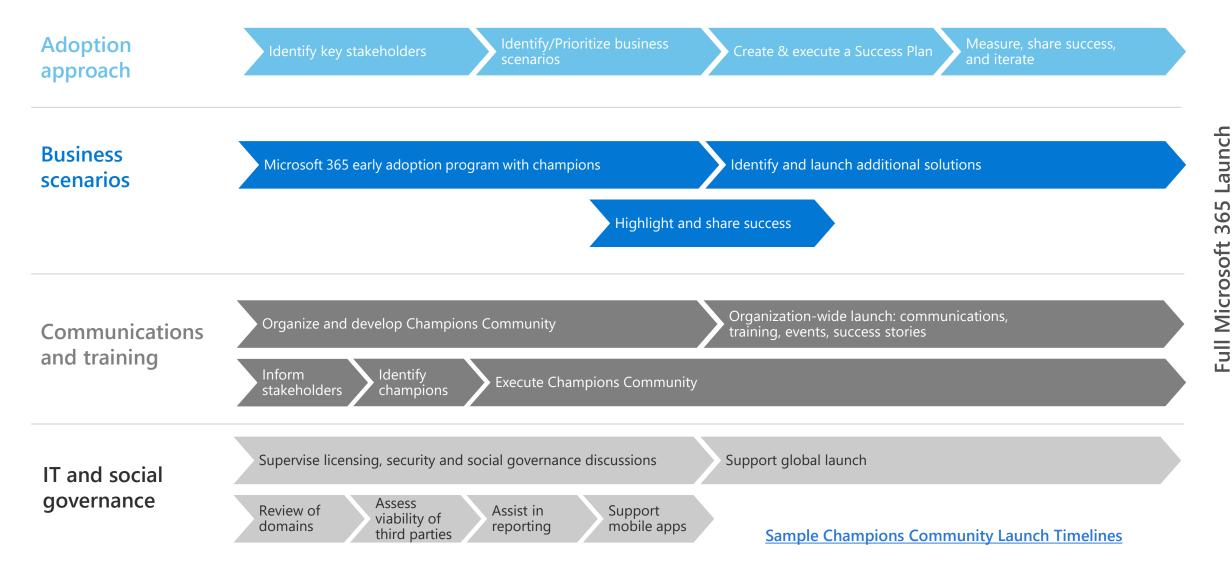
http://aka.ms/bestbuyninjas

Champions:

- Should be formally trained to increase their depth and breadth of knowledge.
- Should be encouraged and empowered to guide, teach, and train their peers.
- Need consistent positive reinforcement that affirms the impact of their efforts.
- 4 Need a clear plan to execute.



Incorporate Champions Community into the launch plan







An Early Adopter Program gives your organization early insights that will help you bring Microsoft 365 to life for all users. Think of it as a dry run, among a representative group, that will help you prepare for full-scale launch.

Working with Early Adopters lets you test your ideas and collect feedback that will help your project team bring that "WOW" factor to your full, organization-wide launch.

Find all the resources you need to organize, plan, and launch your Early Adopter Program in Microsoft's <u>Early Adopter Program Guide</u>.



Why is this program important?

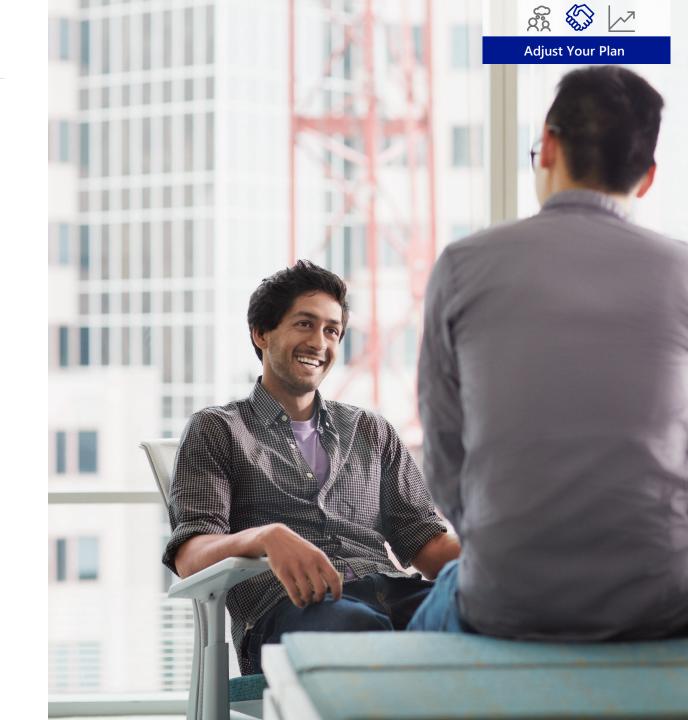
- Identify pitfalls. Gather initial feedback and identify potential stumbling blocks to help shape your final launch plan.
- Collect feedback. Get feedback from users on the identified goals and scenarios for your Microsoft 365 implementation.
- Solve problems. Troubleshoot potential issues with a smaller group of users prior to an organization-wide launch.
- Recruit Champions. Develop a pool of potential enthusiasts to recruit from. These individuals will help colleagues adopt Microsoft 365 once the full rollout takes place.



Use Early Adopter feedback to adjust your adoption approach

Use feedback from Early Adopters to revisit your communications, training, and feedback plans. Adjust your overall approach based on the input received.

Consider bringing your Early Adopters into the Microsoft 365 Champions group so they can continue to support their peers through the transition.





Phase Three: DRIVE VALUE



DRIVE VALUE

Full-scale deployment and business success depend on usage and satisfaction. This requires planning through the Envision and Onboard phases plus ongoing operational excellence.

- Monitor End User Adoption
- o Measure and Report Usage
- o <u>Encourage Ongoing Engagement</u>













If your company is not meeting its KPIs, consider possible reasons why end users have not fully adopted the technology.

Distribute <u>satisfaction surveys</u> to gather data about your users' knowledge of and sentiment toward the new Microsoft 365 services. The results will help you determine how successful the rollout has been and get you thinking about how to incorporate this feedback into actionable next steps:

- o Circulate a baseline survey shortly before users receive their accounts and devices, to gather data about their knowledge of Microsoft 365.
- Conduct a survey halfway through your launch to gather data about users' experiences with Microsoft 365. Use the results to make any necessary adjustments.
- Create new awareness or training content to address any outstanding needs that arise.
- After your organization-wide rollout, use a final survey to assess user satisfaction. You can release this survey 90 days after launch, and then in quarterly increments to help measure user adoption from satisfaction and productivity standpoints.







Within the Microsoft 365 Admin Portal you'll find reports available to indicate your current user engagement levels for the different workloads.

Refer back to these reports to measure against your success criteria and identify areas for improvement.

Continue to track KPIs using your customized scorecard in the Adoption Planning Workbook.





Measure and Report Usage



Active User Reports

Skype for Business Clients Used



Microsoft 365 Groups **Activity**



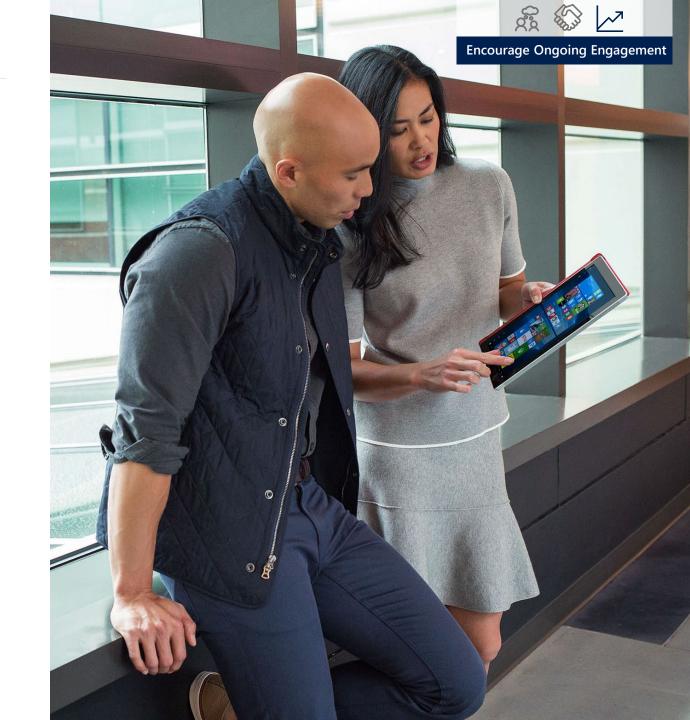
Microsoft 365 Adoption **Content Pack**





Increase adoption over time with ongoing activities

- Leverage tips and tricks emails to reinforce skills development: <u>Download from Resource Hub</u>
- Create a Yammer group or Teams channel to continue conversations on best practices and new features.
- Share success stories showing how people are using Microsoft 365 in innovative and impactful ways.
- Periodically host additional engagement events like town hall meetings or lunch & learns to drive end user engagement.
- Set challenges and run competitions to celebrate how people best use Microsoft 365 to work differently.





Remember these proven strategies when driving deeper engagement

- Reward people for changing their work behaviors cultural evolution is critical to adoption.
- o Define examples and patterns workers can relate to.
- Provide training to help workers get the most value from the new tools.
- Teach people to use the collaboration tools as a set use SharePoint and Microsoft Teams, not SharePoint or Microsoft Teams.
- Continue to find your Champions advocates for change within the business - including executives, managers, and admins.
- Use Hubs for information aggregation, consistency, and enabling collaboration across larger groups.







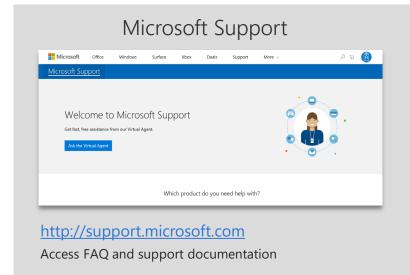
Microsoft is here to support you

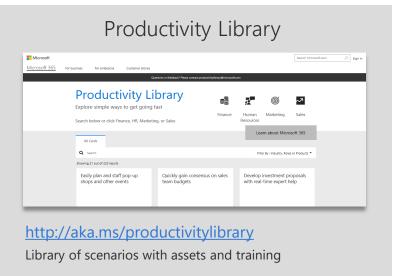
Bookmark these resources to continue driving end user engagement throughout your adoption journey















What's next?

Now that you have reviewed the Microsoft 365 Adoption Guide and learned the critical steps for successful technology adoption, it's time to get to put your knowledge into practice.

Click through to the Adoption Planning Workbook to find customizable worksheets and templates that will help you create your own plan and put it into action. We've compiled everything you need to assemble your team, create your adoption strategy, and launch Microsoft 365 in your workplace.

Remember, you are not in this alone. Many organizations are currently adopting Microsoft 365 technologies, and you can connect and share what works and what doesn't in the <u>Driving Adoption Community</u>.



