

Microsoft 365

How to Strategically and Successfully
Deploy M365 to your Organization

About Us



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Power BI, and custom application development.

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Let's talk about...

- ▶ What a failed deployment looks like
 - ▶ What a successful deployment looks like
 - ▶ The Analysis & Design Process: The recipe for successful adoption
 - ▶ Getting the right people at the table
 - ▶ The Strategy Team
 - ▶ Focus Groups
 - ▶ Breaking it down
 - ▶ The ROI
- 

What does a **failed** deployment look like?



What does a **successful** deployment look like?



The Analysis and Design Process

- ▶ Match the solution to the needs of the organization
- ▶ What happens if we don't do it?
- ▶ Elements:
 - ▶ Strategy Team
 - ▶ Focus groups
 - ▶ Information architecture
 - ▶ Governance
 - ▶ Branding/culture/identity
 - ▶ Communication
 - ▶ Training
 - ▶ Launch
 - ▶ Support

“You didn’t give us what we wanted. You gave us what we needed.”





M365 or Bust!

(when do I need this process?)

- ▶ Are you deploying M365 to your organization?
- ▶ Are you migrating from on-prem to M365?
- ▶ Are you rescuing a failed or stalled M365 deployment?
- ▶ Are your users just not adopting M365 like they should?

Microsoft 365 Projects are not IT Projects



Your Microsoft 365 strategy should be to build a communication and collaboration platform reflecting the goals and culture of the organization



Build your strategy team with representation from key areas of the organization like Communications, Sales & Marketing, HR, IT, Finance, Operations



Engage stakeholders from across the organization in focus group conversations

“We know what the users need”

“If there was a problem, they would tell us.”

“If they need something, they’ll open a help desk ticket.”



What does a Strategy Team do?

- ▶ Commit 1 to 2 hours per week for meeting and follow up
- ▶ Be champions and visionaries for how Microsoft 365 will be utilized
- ▶ Surface the varying needs of the organization around communication, collaboration, and processes
- ▶ Develop adoption and communication plan
- ▶ Develop Microsoft 365 Governance plan (implemented later by IT)
- ▶ Create user training plan
- ▶ Create a plan for pre-launch testing
- ▶ Set priorities and timeline for the project
- ▶ Monitor project progress
- ▶ Internally coordinate strategy team and focus group meetings

Strategy Team Roles

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.	Communication, Marketing, Admin, IT
Project Manager	Oversee the entire Microsoft 365 launch execution and rollout process	Communication, Marketing, Admin, IT
Department Leads (Stakeholders)	Identify how specific departments will use Microsoft 365 and encourage engagement	Any department (management)
IT Representative	Oversee all technical aspects of the rollout, including integrations	IT
Communication Lead	Oversee company-wide communications about Microsoft 365	Corp Communications, IT or other

A decorative graphic on the left side of the slide features several thick, colorful ribbons (yellow, pink, blue, green, red, and black) that are intertwined and knotted together, extending from the left edge towards the center. The background of the slide is a dark green geometric shape on the right, transitioning to a lighter green on the far right, with a white background on the left where the ribbons are.

Strategy team: Common Issues

- ▶ Over representation by one or more areas of the organization
- ▶ Project participation is not prioritized or supported within the departments.
- ▶ Team members are not empowered to speak for their departments
- ▶ Lack of an engaged executive sponsor
- ▶ Too many members

What does a Focus Group do?

- ▶ Commit 1 to 2 hours to answer questions about their own or their department's information, process, communication, etc. Please note that these are not conversations about technology.
- ▶ Assist in reviewing and assessing existing solutions
- ▶ Provide feedback about potential/planned solutions





Focus Group best practices

- ▶ Represent all major areas of the organization (Operations, Sales, Manufacturing, etc.)
- ▶ Represent all levels of employees within the organization, not just leadership within each department.
- ▶ Target 2-6 people for each Focus group (no larger) so everyone participates.
- ▶ Send a message from the leadership explaining the importance of attending and participating in these meetings.

Focus Group Questions

Department/Team Focus

1. What is your role in the organization? What does your department do?
2. What does your typical work consist of - tasks, processes. Think of things you work on as a/an:
 - a) Individual
 - b) Member of department/team
 - c) Member of cross-functional or project team
3. What type of information, documents, or data do you work with every day?
4. Does your department have policies, guidelines, or instructions for work? If so, how do you and others access these?
5. What kind of information would you like to share with others in the organization? Think about what would be shareable to the entire organizational vs. your department or project team. Another way to think about this is... what do people ask you or others in your department for frequently? Think about what information or documents you frequently share with others via email?
6. Do you frequently share information with or collaborate with people outside of your organization? If so, what tools do you use, i.e. email, DropBox, other?
7. What other applications/tools/technologies do you use?
8. Where are departmental documents stored? Does this present any challenges?
9. If you collaborate with other departments, where are these documents stored? Does this present any challenges?

Focus Group Questions

Organization Focus

1. How do you find out about what's happening in other areas of the organization?
2. Do you think the organization communicates effectively about important strategic goals and issues? If yes, how are they communicated? If no, how would you like to see this communicated?

Focus Group Questions

Employee Perspective

1. What other parts of the company provide information/documents that everyone uses? What are they? Think about things you seek from others. Think about information or documents that people email to you.
2. What processes do you wish were easier to complete or where the process could be more transparent? Think about things that start with a form that you fill out and then something happens after that, like an approval or some other action.
3. Where do you store your documents? How do you share documents with others? Does this present any challenges?
4. In your personal or professional life, do you use social media to connect with others?

Focus Group Questions

Other Questions

1. A good intranet will support/communicate/foster the culture of an organization. How do you and other leaders want to use the intranet to improve the culture of the organization?
2. Does your organization have a documented cultural initiative or mission/vision/values? What is your description of a good culture?
3. Related to culture...what unspoken message should be communicated when users come to the site? What do you want people to think/feel/do?
4. How does learning and training fit into the organization? How do you see the new intranet fitting into this?

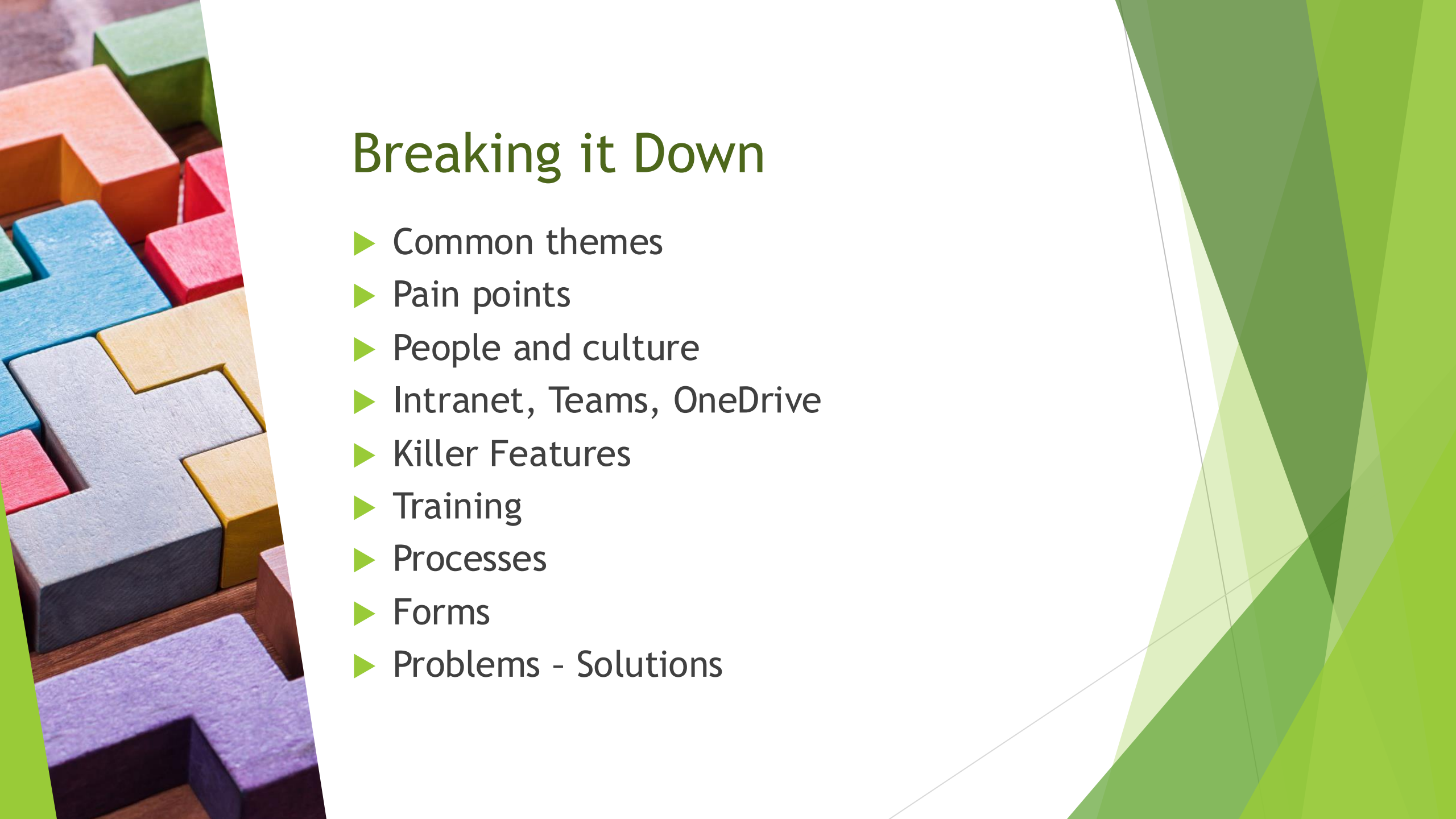
Focus Group Questions

Pie in the Sky

If you could have a tool that could do anything to improve/make your work easier, what would that be?

If you could wave a magic wand...?

Think big and get ridiculous with your answers!

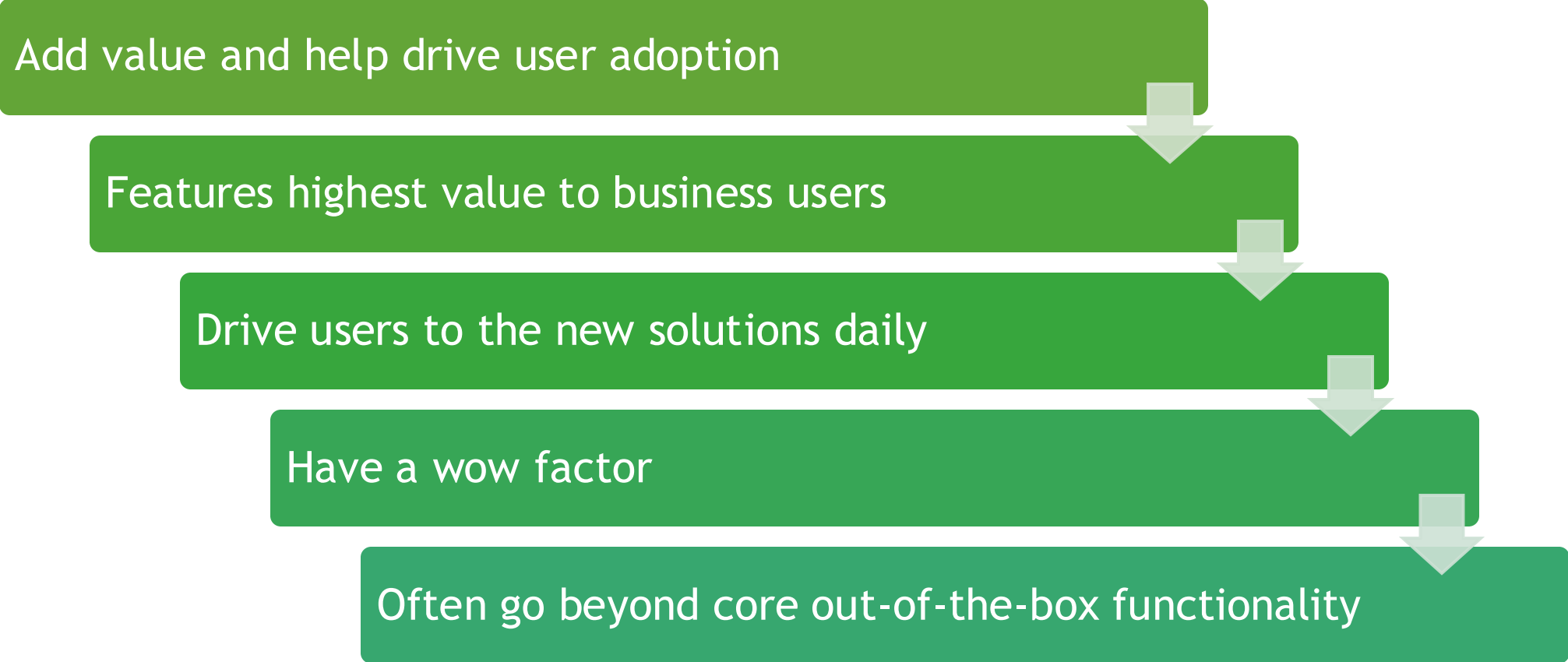


Breaking it Down

- ▶ Common themes
- ▶ Pain points
- ▶ People and culture
- ▶ Intranet, Teams, OneDrive
- ▶ Killer Features
- ▶ Training
- ▶ Processes
- ▶ Forms
- ▶ Problems - Solutions

Killer Features

Add value and help drive user adoption

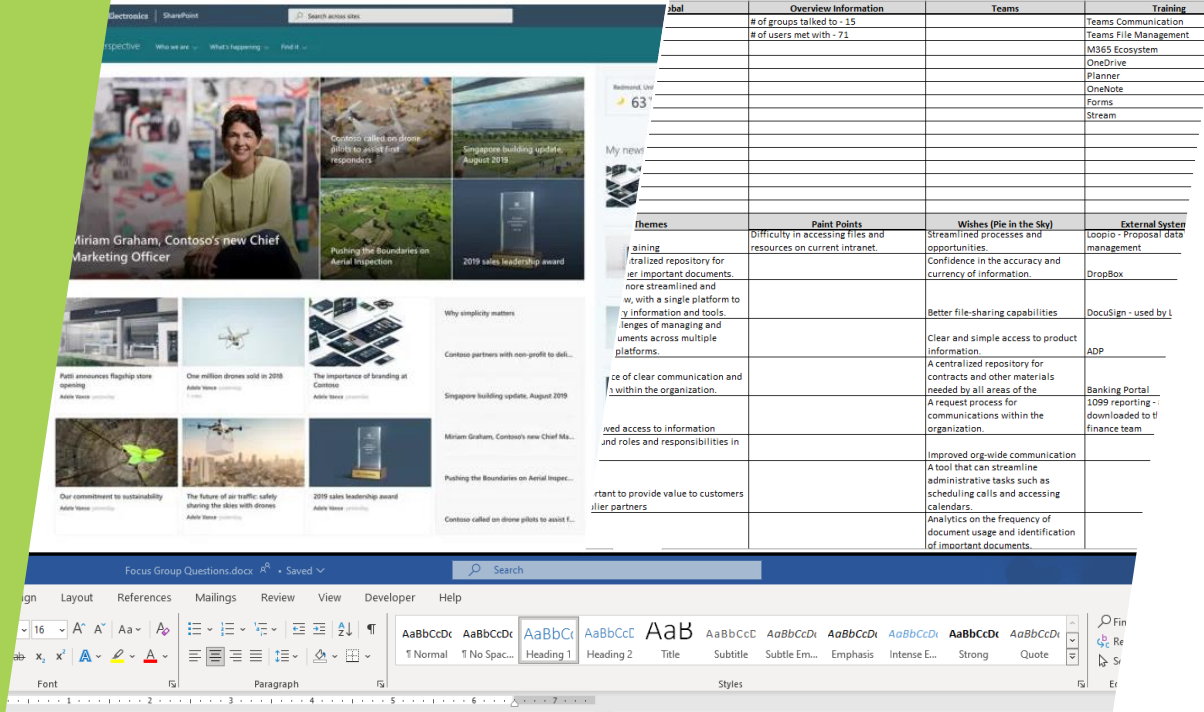


Features highest value to business users

Drive users to the new solutions daily

Have a wow factor

Often go beyond core out-of-the-box functionality



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Organization Focus

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11. Do you think the organization communicates effectively about important strategic goals and issues? If yes, how are they communicated? If no, how would you like to see this communicated?

12. What other parts of the company provide information/docs everyone uses? What are they? Think about things you see. Think about information or documents that people email!

13. What processes do you wish were easier to complete or v could be more transparent? Think about things that start you fill out and then something happens after that, like a some other action.

14. Where do you store your documents? How do you share others? Does this present any challenges?

15. In your personal or professional life, do you use social r with others?

16. If you were able to access all of your important inform shared calendars, organizational news, etc.) in a centr the qualities that would be most important to you lik else?

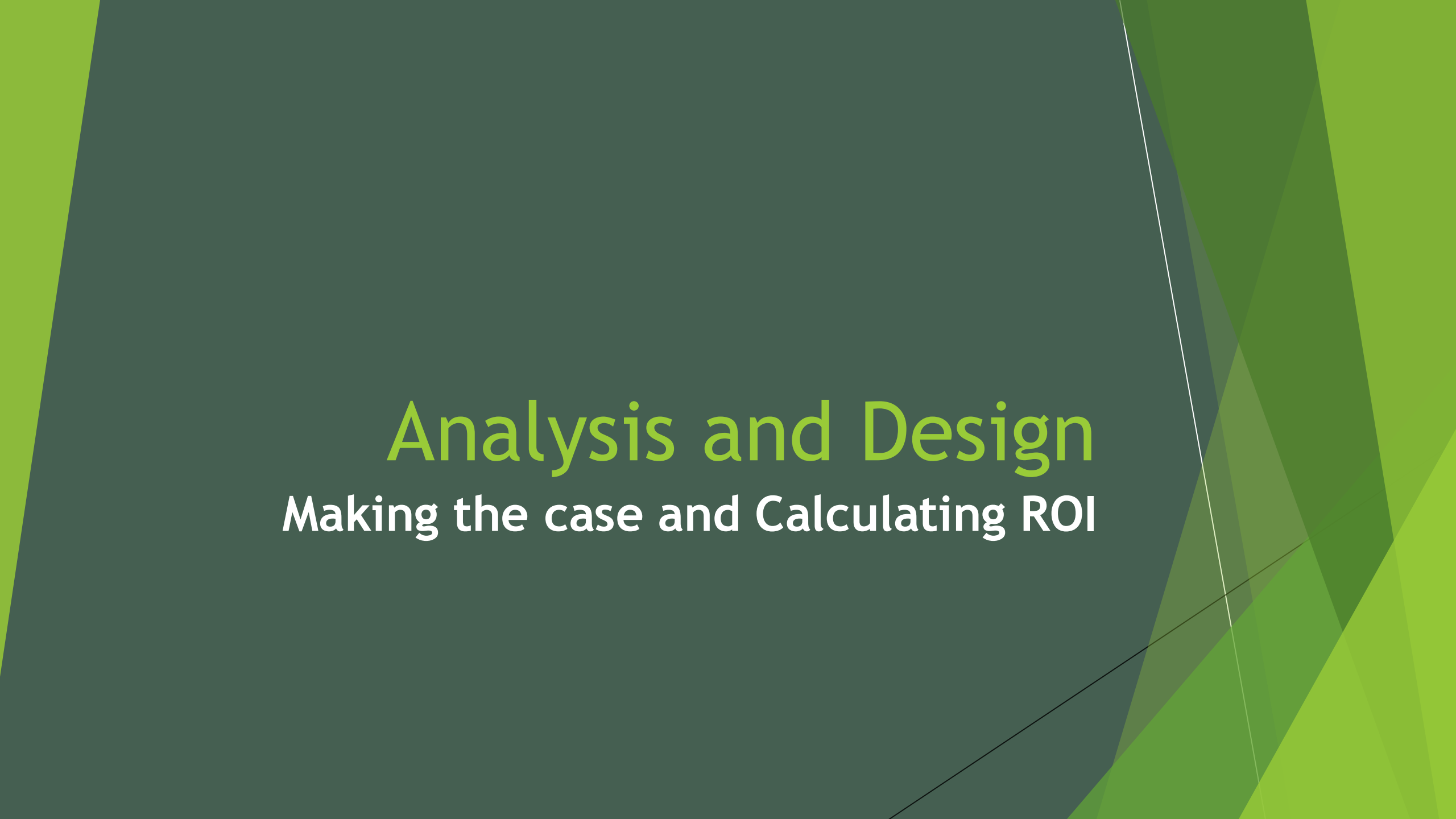
- a. ☐ Simple Navigation
- b. ☐ Looks Good
- c. ☐ Solves a Particular Business Problem
- d. ☐ Information is Easy to Find
- e. ☐ Personalization/Customization Capability
- f. ☐ Shared Communication
- g. ☐ Event and Project Calendars
- h. ☐ Document Management
- i. ☐ Relevant Search Results
- j. ☐ Integration with Other Applications
- k. ☐

Pie in the Sky

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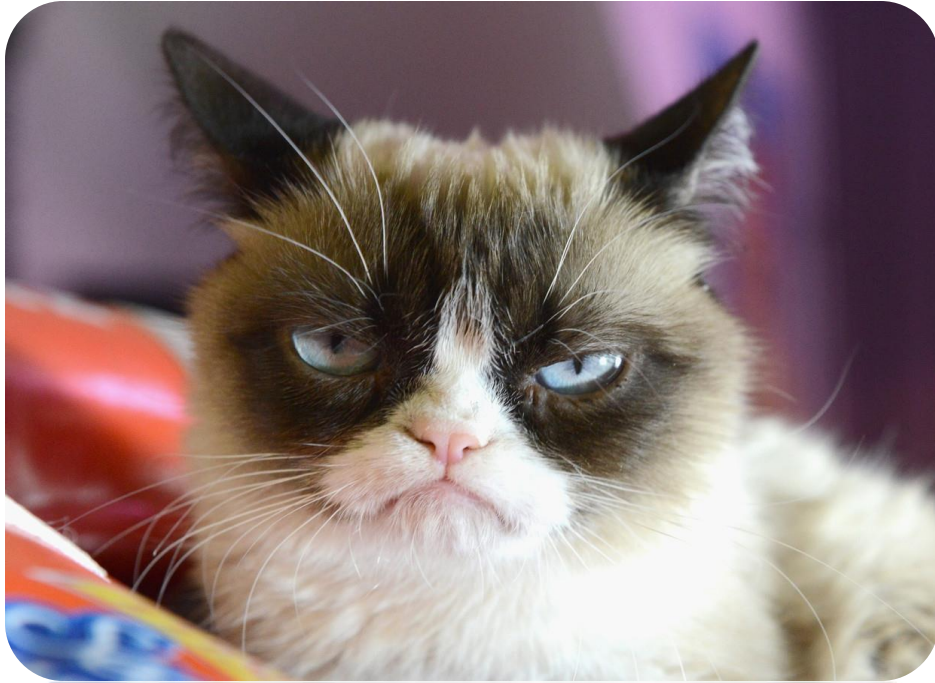
Deliverables

Proposed Site Map / Information	
High Level Structure	
SharePoint Intranet	
Main Hub	
Home site	
Site Navigation	
News	
HR Hub	
Sales Hub	
Viva Learning	
Viva Connections	
Permissions Management	
Security and Compliance	
Search in SharePoint	
Teams	
Types of Teams	
Document Libraries	
Shared Calendar	
Microsoft OneNote	
Microsoft Planner	
Shared Inbox / Conversations	



Analysis and Design

Making the case and Calculating ROI



NOPE

What if my organization says no to an Analysis and Design Phase?

- ▶ Stay calm
- ▶ Know the facts
- ▶ Explain the benefits
- ▶ Talk about the ROI
- ▶ Talk about the risks
- ▶ Use analogies or examples
- ▶ Be pragmatic and willing to compromise about how you build it in

Financial ROI

- ▶ Efficiency
- ▶ Less IT labor
- ▶ Lower maintenance
- ▶ Reduced storage hardware
- ▶ Eliminating redundant solutions:



Employee Satisfaction ROI



Increased employee job satisfaction



Doing the work they were hired to do, rather than spinning their wheels searching for things and in meetings



Feeling heard as their everyday pain points are addressed in this process



An interface for work that is simple, user-friendly and reflects their desire to be included in communication



Less tool confusion (which tool for which job?) equals less stress.



A greater connection between remote employees will increase the sense that they are connected and a team.

The background is a vibrant green gradient. It features several large, semi-transparent circles of varying shades of green, creating a bokeh effect. On the right side, there are sharp, overlapping geometric shapes in different shades of green, including triangles and polygons, which add a modern, abstract feel to the design.

Questions?

Thank you!!!



Please submit session feedback