



C5insight

WORK. TOGETHER. BETTER.



Microsoft Teams

Deployment and Governance Guide

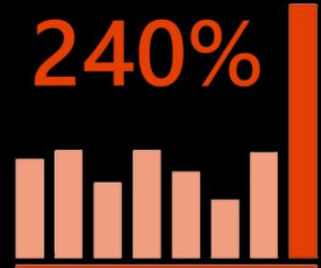


Introduction

Microsoft Teams (we will also refer to it as “Teams” in this document) is a digital collaboration tool that can enhance teamwork by enabling collaboration, storing team files in one location, enforcing consistent project planning, and making all team conversations easily visible. When deployed correctly, Teams transforms organizational productivity, efficiency, engagement and even job satisfaction.

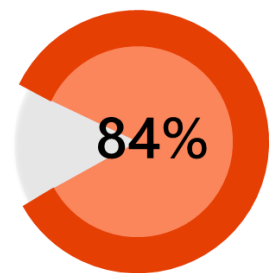
“ When organizations successfully engage their customers and employees, they experience a 240% boosts in performance-related business outcomes. ”

Gallup, “State of the American Workplace”



But success isn’t guaranteed. In fact, according to a recent study from Forbes magazine, digital workplace projects such as Microsoft Teams fail 84% of the time. Success is dependent upon a well designed and intentional plan. Use this guidebook to get started on a plan that will lead to success.

The remainder of this document will follow the outline below to aid you in your journey and keep you focused during your deployment. The steps build upon one-another – be careful not to take shortcuts that end up frustrating your team, extending your timeline and expanding your project budget.



84% of Digital Workplace Projects Fail

Forbes

PICTURE THIS

Your organization launches a Teams project and everyone loves it and starts using it. Flash forward 12 months and your users are overwhelmed with the number of different Teams. Some are mis-using it causing morale and even compliance issues. Others aren’t using it at all. Frustration is mounting and adoption is falling off.

This situation happens more often-than-not when organizations don’t start with the right plan in place.

1. Vision and Planning
2. Information Architecture
3. Governance and Policies
4. Managing Team Lifecycles
5. Where to Start
6. Change Management

1. Vision and Planning

It can be tempting to jump directly into using Teams and providing access to everyone in your organization. But most organizations who have taken that path have ended up mired in an under-used and overly-complicated structure that they then have to invest in getting back on track.

A vision and plan for Microsoft Teams answers three simple questions. Organizations spend anywhere from a few hours to several weeks answering these questions.

What is the Purpose of this Project?

In today's world your team is already overwhelmed with different technology options. And, as a Microsoft Teams user, you are probably already using other tools in Office 365 such as SharePoint, Yammer, Office Groups, Planner, OneDrive and more. Defining your purpose should result in a vision statement that you can use to keep your project focused on the goal.

SAMPLE VISION

The vision for MS Teams for our company is to provide an area where groups of 2 or more people can have a site to store documents, collaborate on documents, and chat about current efforts where they are working towards a common goal.

What Specific Initial Benefits will the Business Experience?

Now dive deeper than a generalized vision into the specific use-cases for what the individuals in your organization will do to improve their work processes with Microsoft Teams. Don't expect to capture all of them up front – but start with 2 or 3 and build from there. If you don't have specific use-cases, you are more likely to get off track.

USE CASE TEMPLATE

As a: _____
I need: _____
So that: _____

USE CASE EXAMPLE

As a: Project Manager
I need: A place to store plans, conversations, meetings and documents
So that: I can more efficiently manage projects

What is Our Plan for Getting There?

A plan for Microsoft Teams shouldn't stand alone. Incorporate it into your larger Digital Workplace Plan to be sure you're considering all the needs of your business.

2. Information Architecture

Information Architecture. It's an intimidating term. But it is simply a way to strategically plan how information will be organized to make it easier to find where to put (and find) the things that people need in order to get their jobs done. It means thinking ahead, and it often means integrating (or even eliminating) some applications in order to make it easier for your team to get their jobs done.

PICTURE THIS

Microsoft Teams projects often feel like they result in more busy work than strategic advantage for users. Here is a quote from a company that was struggling with adoption:

"We felt like we were working hard taking a hill for our leadership team. We felt like we had heavy packs on our backs filled with rocks – each of which were an application. Then someone came in and said, 'Here, this should help,' and threw in a rock that said 'Microsoft Teams' on it and walked away."

Employees spend about 20% of their time looking for data that they need to get their job done.

- Harvard Business Review

Key questions to ask for your information architecture plan:

- What solutions will the business use for storing and sharing information (for example, will you use Microsoft Teams exclusively, or will SharePoint, OneDrive and potentially other solutions also be used)?
- Where, generally, will types of information be stored?
- Where, specifically, will specific items be stored?
- What security settings are required to protect the information?
- What tools will users need in order to find it (navigation, search terms, naming conventions, metadata, etc)?
- How will users navigate across various content storage repositories? For example:
 - Will SharePoint sites used to store Microsoft Teams documents appear in the main SharePoint site navigation?
 - Will Microsoft Teams include links to SharePoint sites?
- What other applications should be integrated or replaced with Microsoft Teams?
- How will we ensure Teams simplifies the user experience?

3. Governance and Policies

Establishing guidelines for Teams will help with the deployment of the new platform. Guidelines are developed with the majority of your company in mind, but you always have the flexibility to adjust for those situations that are not the norm.

Some may feel that governance gets in the way of productivity – but an ungoverned digital workplace is like an ungoverned physical workplace. It may start out more efficiently, but it ends in disruption and chaos.

Below are some suggested places to start with your governance and policies.

POLICIES

Teams Creation and Usage

- Only authorized users can create new Teams
- All Teams require 3 or more members
- All Teams require 2 or more owners
- Teams should have short, concise and precise names
- Teams must show usage every 30 days
- Unused Teams will be decommissioned with 30 days notice given to Owners
- Owners can delete their Teams

Sharing

- All communications will comply with corporate digital communications policies.

Social Platforms

- The organization will use Microsoft Teams as their only social communications platform until it has been fully adopted.
- Yammer may be used integrated with certain SharePoint sites on a case-by-case basis, but users will not be provided with training to directly log into Yammer.

Format

- Specific guidelines will be followed for creating channels and tabs in order to provide a consistent experience when navigating from one Team to another.

SETTINGS AND CONFIGURATION

Teams Creation

- The ability for users to create Teams will be turned off for all except authorized users.

File Sharing

- Office 365 is the document system of record. Users will not be able to share files from third party platforms (such as DropBox or Google Docs) via Microsoft Teams.

Meetings

- Dial-in attendees can bypass the meeting lobby.
- Anonymous attendees can start a meeting.

SharePoint Sites

- SharePoint sites associated with Microsoft Teams will have all navigation removed and will be limited to a document library only

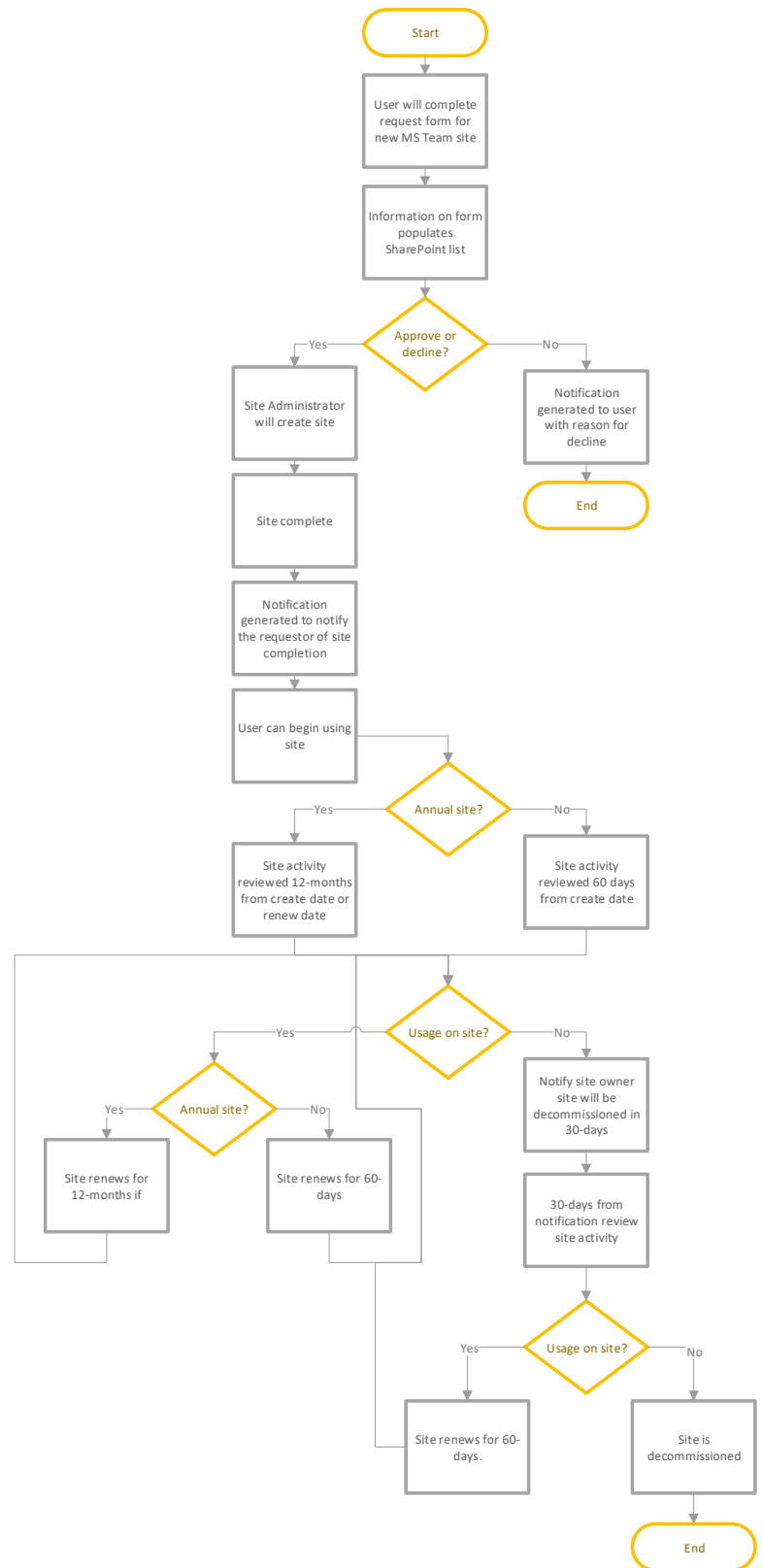
4. Managing Team Lifecycles

The process of creating and decommissioning Microsoft Teams should be efficient enough to make it easy and rapid for users, while also including controls to ensure that the number of available Teams doesn't quickly grow to overwhelm users, and automated enough to make management an efficient task.

This page contains a specific example of a process flow for creating and decommissioning Teams.

The process can be automated use the features found in SharePoint, Power Automate, Forms and other Office 365 tools.

MS Teams Process Flow



5. Where to Start

Although Microsoft Teams is simple in concept, it encapsulates a broad range of functionality. Attempting to adopt everything at once can be overwhelming. The best place to start depends upon your organizational needs. Below are four different suggested starting points to consider.

CHAT and MEETINGS

Microsoft Teams is the replacement for Microsoft Skype for Business – which was used for sending mostly internal instant messaging and digital voice calling/meetings.

Although this functionality does not require the creation of new Microsoft Teams, it is an excellent way for users to begin to acclimate to the new solution. It is recommended that the ability to create Teams be turned off during this initial period and that no teams are visible in order to minimize user confusion.

PILOT

Regardless of which approach is taken, it is recommended that you begin with a pilot with a small group of users.

This group will help to troubleshoot issues, will become helpful resources to other users, and may become “Authorized Users” who are given permission to create Teams in the future.

PROJECTS

Microsoft Teams shines as a tool for sharing project communication.

Project communications may include meeting invitations, internal chats, documents, project plans and more. Projects often cross team boundaries and therefore can also be an excellent way to break down silo walls and get a broad range of individuals familiar with Microsoft Teams.

LOB TEAMS

Specific business units may also benefit tremendously by migrating to Microsoft Teams. These teams may struggle to use tools like a file share or SharePoint to collaborate – but may find Microsoft Teams to be a more intuitive and rapid way to work together.

For example, an HR team that is working on developing new policies may find that Teams gives them an excellent structure for secure communication during the development process.

Technology is the Easy Part. People are the Hard Part.

6. Change Management

Driving adoption and changing behavior is difficult. In a recent study by Harvard Business Review, it was noted that organizations that get leaders and management to adopt digital tools experience measurably better success than those that don't. Be sure to build a plan for change management into your overall Microsoft Teams plan.

Your change management plan, at a minimum, should include specific plans for:

Communications: In her annual research into digital transformation success, Jane McConnell notes that internal communications is the second most important driver of successful adoption

(a vision, or “defining the why” is the most important). Consider how you can use traditional and digital approaches to communicate with your team.

Coaching: As noted in the nearby research from Harvard Business Review, leaders and managers that utilize a Digital Coach experience more sustainable transformation than those that don't. Just as a fitness plan with a coach gets better results than a gym membership, so it is with digital transformation. Be sure to align the right coaching resources with your leaders to get long-term traction with your Microsoft Teams project.

Training: Training takes many forms. Give your users a variety of training options to fit their learning style and availability. Classroom, tip sheets, lunch-n-learns, over-the-shoulder, self-paced digital and others should all be considered.



The Success Formula

Build a Strong Foundation: The 4 pillars of digital workplace success will not last if they are not on a solid foundation. Take the necessary time to create a long-term roadmap (including an ROI – ask C5 Insight for an e-Book with ROI statistics), create short-term milestones, continuously evolve your governance policies, and – perhaps most importantly – help your team through the change. When a caterpillar becomes a butterfly it thinks differently, eats differently and moves differently – the same will be true of your transformed team. c5in.co/transform1

Keep One Hand on the Wheel: Organizations that start with a strong digital workplace, which later fails, often report that the path to failure started shortly after their project leadership team disengaged. Establishing the right leadership team and meeting cadence plays a vital role in keeping your digital workplace initiative moving forward. A Digital Advisor that monitors progress and keeps the leadership team engaged is a critical project role. Just as your physical workplace requires constant attention, so does your digital workplace. c5in.co/steering

Remember the Basics: Microsoft Teams should make it easier for your team to: (1) **Listen** to each other and to customers, (2) **Understand** and analyze data, (3) **Connect** with each other using consistent, but flexible processes, (4) **Know** how they are performing so that they can continuously improve, and (5) use it as a solution to create a great culture. Listen, Understand, Connect and Know – that’s being “Powered by LUCK”. When organizations obsessively focus their digital workplace on those 5 elements, they more consistently find their way to success. c5in.co/dwLUCK

FIND the RIGHT PARTNER

Creating a digital workplace that transforms how your team works together takes more than just technology skills. You would not hire a handyman to build a new home, likewise, you should not have a general IT partner build a new digital workplace. Your partner needs to help you build a strong foundation, work alongside your executives to keep a hand on the wheel, and keep your project grounded in the basics. At C5insight, we are Powered by LUCK to deliver improved workplace teamwork, technology, thought-leadership, and training. What are you powered by? c5in.co/DWpartner



About C5 Insight

In business, success relies on purpose, people, and process. (But you still need to get the technology right.) **We are fiercely passionate about helping businesses create contagiously engaged employees that transform the customer experience.**

We offer:

Briefings and Workshops: Partner with our experts to guide your organization through a workshop. Lasting between 4 hours and 4 days, the topics can range from employee engagement and customer experience to business process design and change management.

Planning, Roadmaps, Governance and Process Design: Do you have a vision for where you're going, and do you have a flexible plan for getting there? Work with C5 to build your business case, establish measurable outcomes, define journey maps, design sales and service processes, and develop a modified agile process for keeping the team engaged.

Fractional Project Leadership: Need expertise on your team, but not ready to commit to full-time resources? Partner with C5 to temporarily expand your team with C-level, project management, or technical experts.

Project Recovery and Health Checks: Struggling with employee engagement, digital workplace or customer relationship management? You're not alone; **over 60% of these projects fail.** Let us help you recover and set your team up for success.

Technology Implementation: C5 Insight helps clients select, implement and integrate digital transformation technologies. Work with our certified solution experts to install, configure and customize technology so that it is tailored to your organization.

Training, Coaching and Support: If becoming a people-centric organization is like a fitness program, who is your personal trainer? High performance athletes need expert coaching - so do high performing organizations. C5 Insight delivers the support your team needs at the executive, management, user and technology levels.



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704-895-2500 | luck@c5insight.com | www.c5insight.com