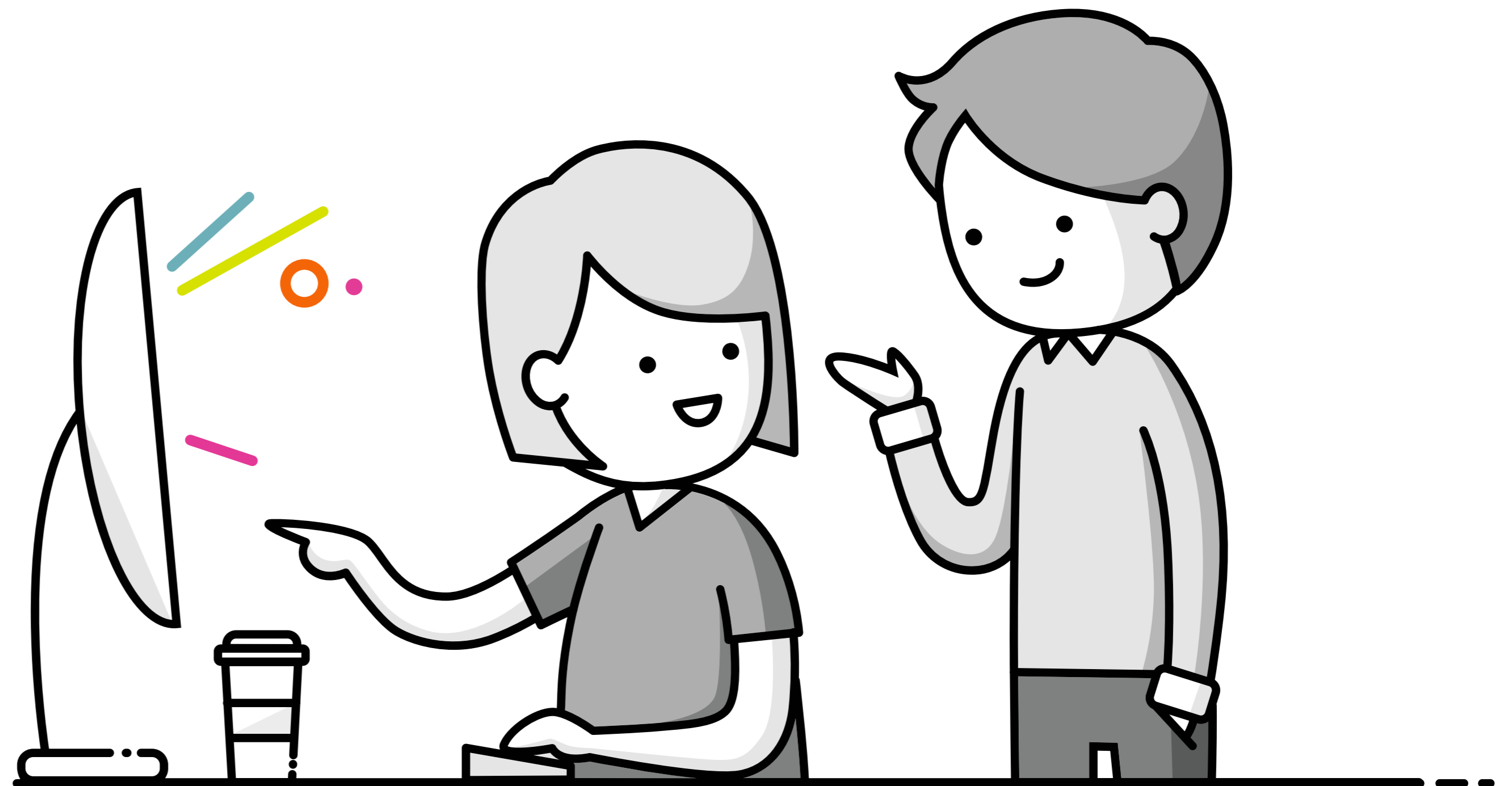


How to roll out Microsoft Teams.

Pre-launch planning guide.



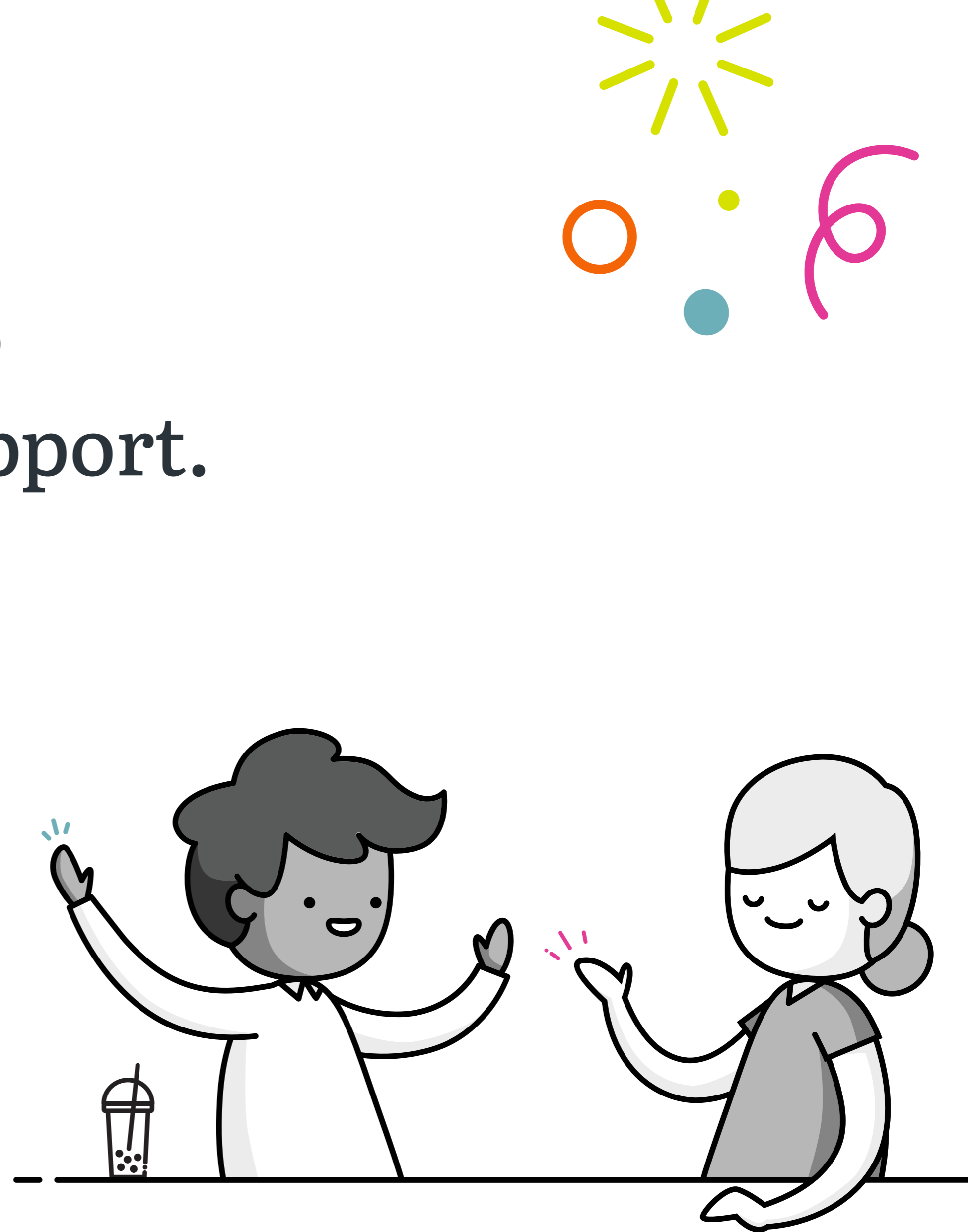
The secret ingredient to successful adoption: support.

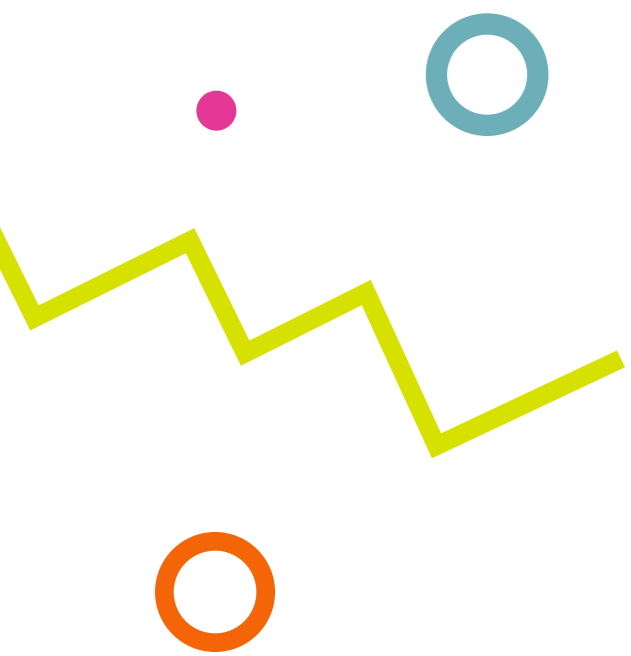
To scale your roll out, you need to be ready to support the change.

Plan your approach to encompass the right tools and people to configure the solution appropriately and build a change strategy based on real user input. You'll have a higher likelihood for success if you work with early adopter groups to shape your support strategy and iterate through their initial onboarding experiences. This approach will help you get it right before you choose to scale enterprise wide.

To help employees understand the changes that are coming, create orientation and training materials that meet people where they are in their onboarding journey.

Use this guide to build your roll-out plan for Microsoft Teams and have fun driving adoption!





1

Build a vision and plan.

Start by articulating how Microsoft Teams fits into your collaboration ecosystem. Align your key sponsors around the opportunity and create your implementation plan.

A solid plan should consider:

- Implementation activities, budget and schedule
- Team roles and accountabilities for your project sponsor, Office 365 tenant admin, collaboration support team and training, change and communications supports
- Key requirements or governance considerations that might influence the overall configuration
- Early adopter groups who are willing to be your guinea pigs
- Your overall communications plan for the organization and early adopter groups
- Migration tools, training and support services to assist in onboarding
- Help desk and operational resources required to support Teams once it is in its go-live state



2

Define your configuration and pre-launch tactics.

Before you launch, review and discuss the key areas of the technical configuration, such as:

- How employees create or request new Teams (self-service provisioning)
- Site naming conventions
- Archiving strategy
- External and guest access
- Apps to enable or restrict
- Strategies for deploying the Teams client and mobile app

Configure for the most basic collaboration use cases and be careful you don't make configuration decisions that add unnecessary friction to the end user.

You can also use this time to prepare your communications, training materials, onboarding videos and guides, and knowledge base articles.

To curate and share your materials, consider using Stream, an org-wide Teams site or Microsoft 365 learning pathways. Give your team time to train-the-trainer and seek feedback on your materials and approach.



★ **Tip: Resist the urge to turn everything off or add so many controls that it creates unnecessary friction as that will dampen your momentum.**



3 Onboard early adopters.

Consider the following tools and resources for early adopter onboarding:

- “Teams 101” quick reference guides and FAQs
- “What tool, when” guide tailored for your organization
- Teams bootcamp for executives and executive assistants
- Microsoft 365 learning pathways that illustrate basic and advanced learning materials
- Orientation videos
- Content migration services
- Advanced configuration support for complex collaboration scenarios
- Org-wide Teams site for onboarding new groups and sharing onboarding materials

Remember, you don’t have to recreate the wheel. There are lots of free materials created by Microsoft available for you to leverage, as well as third-party learning services that offer training packages or subscriptions for a fee.

★ **Tip: Plan to evolve your training and communications as you learn more about the change experience. Remember that taking a self-directed training strategy does not mean employees need to be unsupported.**

4 Evaluate and iterate.

To build momentum early on, measure feedback from end users and quickly iterate your support strategy.

Your early adopters and support team can provide valuable insight, help you gauge success of the rollout and point out clues that might be holding back your success.

Identify the most and least active users and Teams, then work with them to understand which tools are working and which need to be removed.

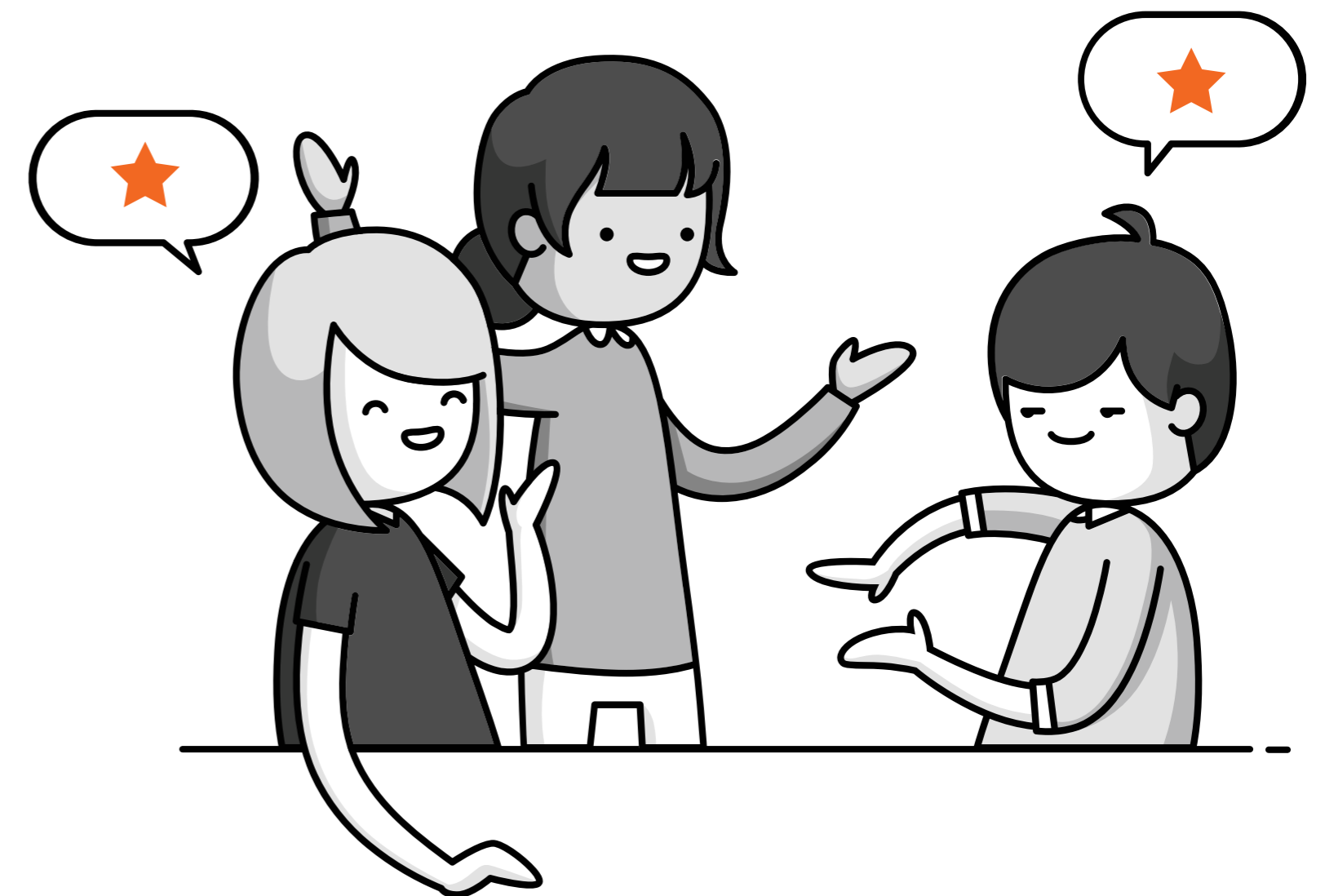
Questions to ask

- What was the most challenging part of your experience moving to Teams?
- What resources were the most (and least) helpful with your orientation?

Host monthly collaboration feedback workshops to collect feedback from your champions and early adopters.

Find wins you can celebrate and use to communicate the impact to others throughout the organization.

★ **Tip: Look out for areas of friction in the adoption process. It could be a technical or cultural issue. Check in with your early adopters.**



5

Scale when ready.

Once you have set up the initial configuration and your support model is ready to scale, it's time to bring on more end users.

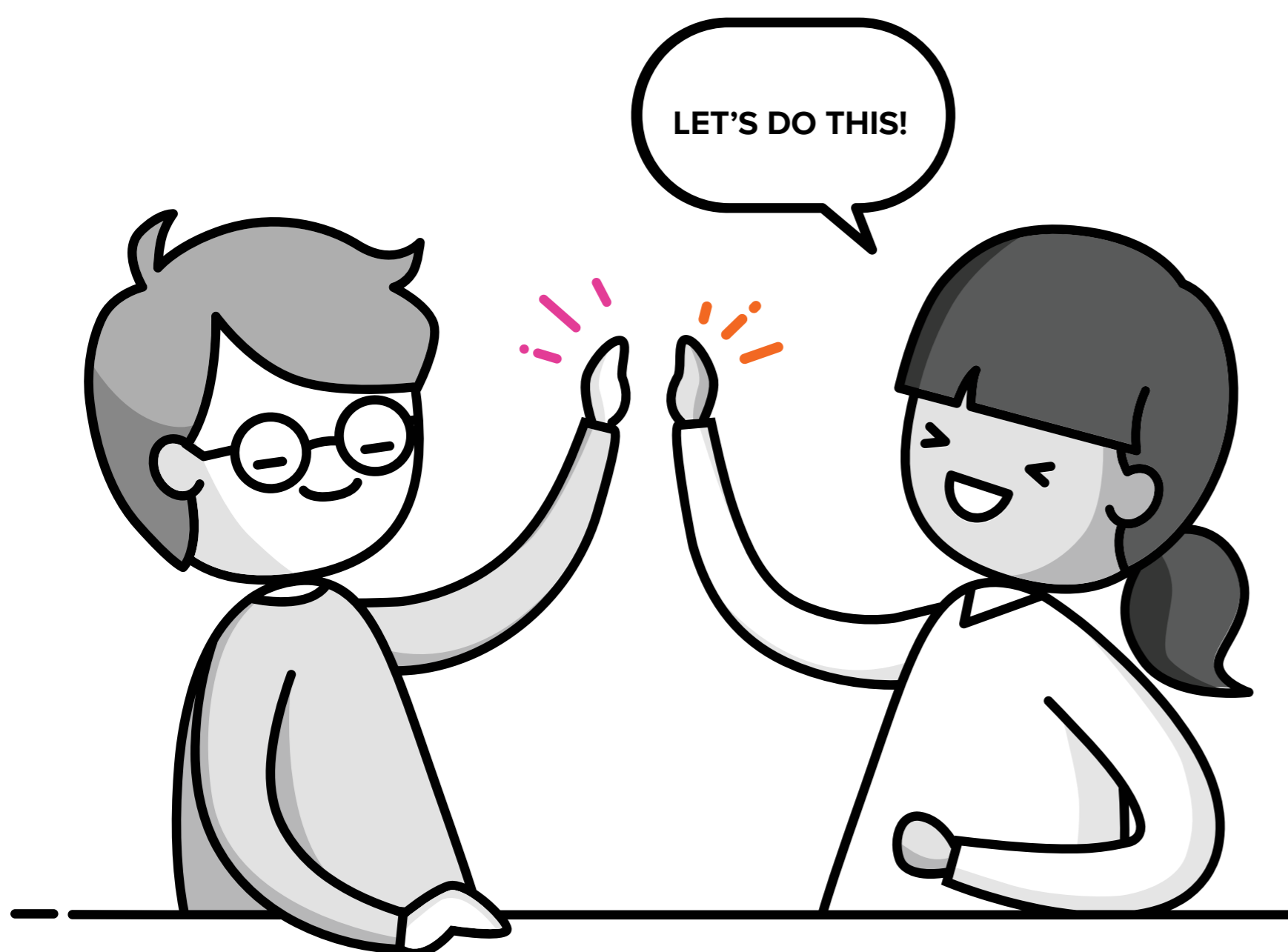
You can roll out by group, department, region or other category.

As you add new users, make sure you have the capacity to support and monitor their requests.

Set up your adoption tracking analytics and milestones to monitor your pace. Treat every 10% as a major milestone and watch how long it takes to progress through each stage – from 20% to 30% to 40% and so on.

Consider increasing the complexity of your use cases as you advance past 40% adoption and look to introduce Live Events, video integration from Stream, PowerApps or other resources.

★ **Tip: If you experience viral growth and a surge of demand, don't resist it! Viral growth is a gift and you should embrace it. Just don't assume your job is done – the first 30% will be the easiest segment of your adoption journey.**





Teams planning checklist.

Team roles and accountabilities

- Do we have a digital workplace team with an understanding of their roles?
- Do we have a clear business sponsor? Are they outside of IT?
- Do we have an Office 365 tenant Admin?
- Do we have our Communications department engaged? Do they understand the roll-out timeline?
- Do we have someone in charge of training and change management?
- Do we have Help Desk team or operational support roles engaged?
- Do we have enough capacity to complete the work?

Building your plan

- Do we have a roll-out plan and schedule that fits the availability of our resources?
- Do we have a definition of success identified?
- Do we have early adopter groups selected?
- Do we have a communications plan for the organization?
- Do we have an onboarding, change and adoption strategy?
- Do we have a communications and training plan for groups that are onboarding?
- Do we have enough budget? Do we have the ability to modify the plan if we need to?
- Do we have migration or end user support services to assist in the onboarding?

Governance and configuration

- Do we have agreement on key requirements and governance considerations that might influence the configuration?
- Do we know who is accountable for configuring Teams and documenting the configuration?
- Do we know if Teams or O365 more broadly has already been configured in ways that might impact our roll-out?
- Do we have an O365 change control process in place?

Implementation, change support, training and onboarding resources

- Do we have an intake process to bring on new groups?
- Do we have the right onboarding resources setup (eg. an org-wide Team) with FAQs, moderated support, videos etc
- Do we have the ability to scale our advanced collaboration or migration services?
- Do we have a clear what tool, when collaboration aid available?
- Do we have a champion group and monthly feedback loop in place?
- Do we know of any cultural barriers by group or have any special tactics required for different groups?
- Do we have our measurement plan ready?

About Habanero.

We help companies become better places to work.

Every organization can be exceptional.

Habanero helps companies grow by engaging and empowering your most important activators of change—your employees.

We help humanize the world of work through the creation of modern workplaces and the cultural, communication, collaboration, and content experiences that power them.

Habanero produces the Go Intranet Accelerator. Go empowers organizations to create the world's best Office 365 and SharePoint intranet experiences.



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