Modern Workplace for Modern People

Ine Princen – Product Marketing Manager , M365

Microsoft

Industry-Wide Focus on Customer Success

"The customer is more important than ever... it's really this culture that's driving us forward."
—Marc Benioff, CEO, Salesforce

"If you stay very focused on customers and customer success, people pay attention to that—and in turn, they also want that same type of success."
—Aneel Bhusri, CEO, Workday

"In a consumption-based business, customer success is all that matters, because it builds on itself over time."
—Amy Hood, CFO, Microsoft

"We're going to put more focus on customer success."
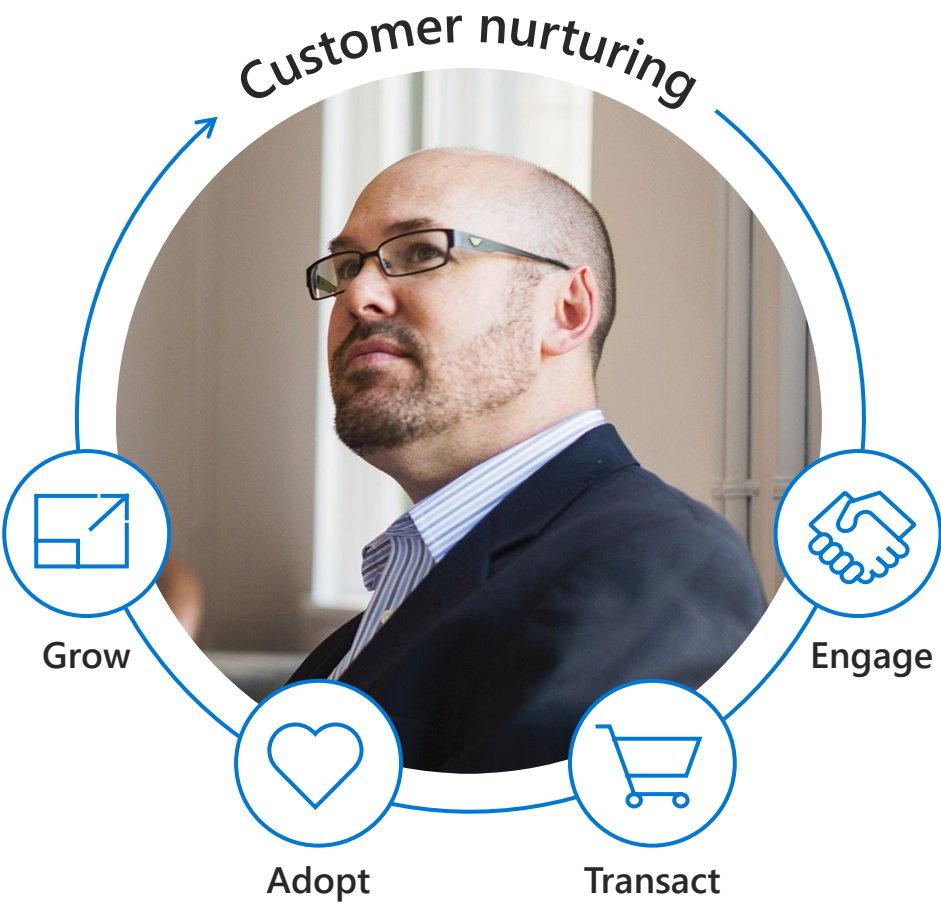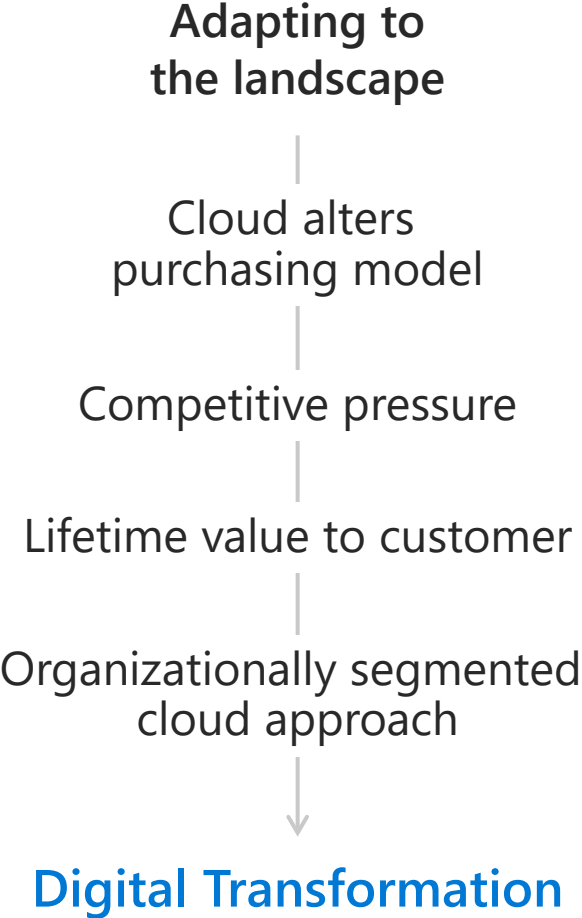—John Donahoe, CEO ServiceNow

"We work with our customers to get live and get successful."
—Steve Miranda, Oracle EVP of Applications

"Customer success is the most important priority."
—Bill McDermott, CEO, SAP

The Case for change – Placing the customer first

Evolving our model

Marketing

Pre-sales

Contract signature

3-year duration

Renewal

Adapting to the landscape

Cloud alters purchasing model

Competitive pressure

Lifetime value to customer

Organizationally segmented cloud approach

Digital Transformation

Customer nurturing

Grow

Engage

Adopt

Transact

Customer success = technology + people change

Successful adoption of a new solution is the result of **different** and **complementary** disciplines: deploying new technology and changing people's behaviors.

Technical Deployment	Change Management
▪ Technology perspective focused on new solution deployment	▪ Organization-wide perspective focused on changes driven by technology
▪ Paid based on solution deployment	▪ Paid based on business outcome
▪ Work completed by Technical Specialist Professionals with technical certifications	▪ Work completed by Customer Success Managers with change management certification
▪ Work with IT & Technical Decision Makers	▪ Work with C-Level and Business Decision Makers
▪ One-time, single workload adoption	▪ On-going work driving adoption of multiple workloads

While both practices may exist within the same partner organization, there should be **two separate functions** focused on different business outcomes.

Adoption & Change Management

- Microsoft 365 enables customers to transform how they serve their customers and manage their operations

- Transformation means change: changing processes, how people work, and improved outcomes

- Change creates challenges and opportunities for Partners and Customers

Challenges	Opportunities
- People resist change – resistors can prevent success	- Change Management techniques have matured significantly
- Many customers think they can manage change themselves, but don't have skills or bandwidth	- Broader awareness about the importance of human factors in driving change
- Post-implementation engagements often underfunded	- Customer mindset toward broader transformation versus narrower solution

Why do you need Adoption & Change Management?

Microsoft 365 solutions enable your customers to achieve business outcomes – cost savings, time savings, simplifying and automating processes. However, these outcomes can only be achieved if end users adopt and use the new technology, and use it as intended.

The Human Factors that Determine the Financial Return or ROI

Speed of Adoption

How **quickly** are people up and running on the new systems, processes and job roles?

Ultimate Utilization

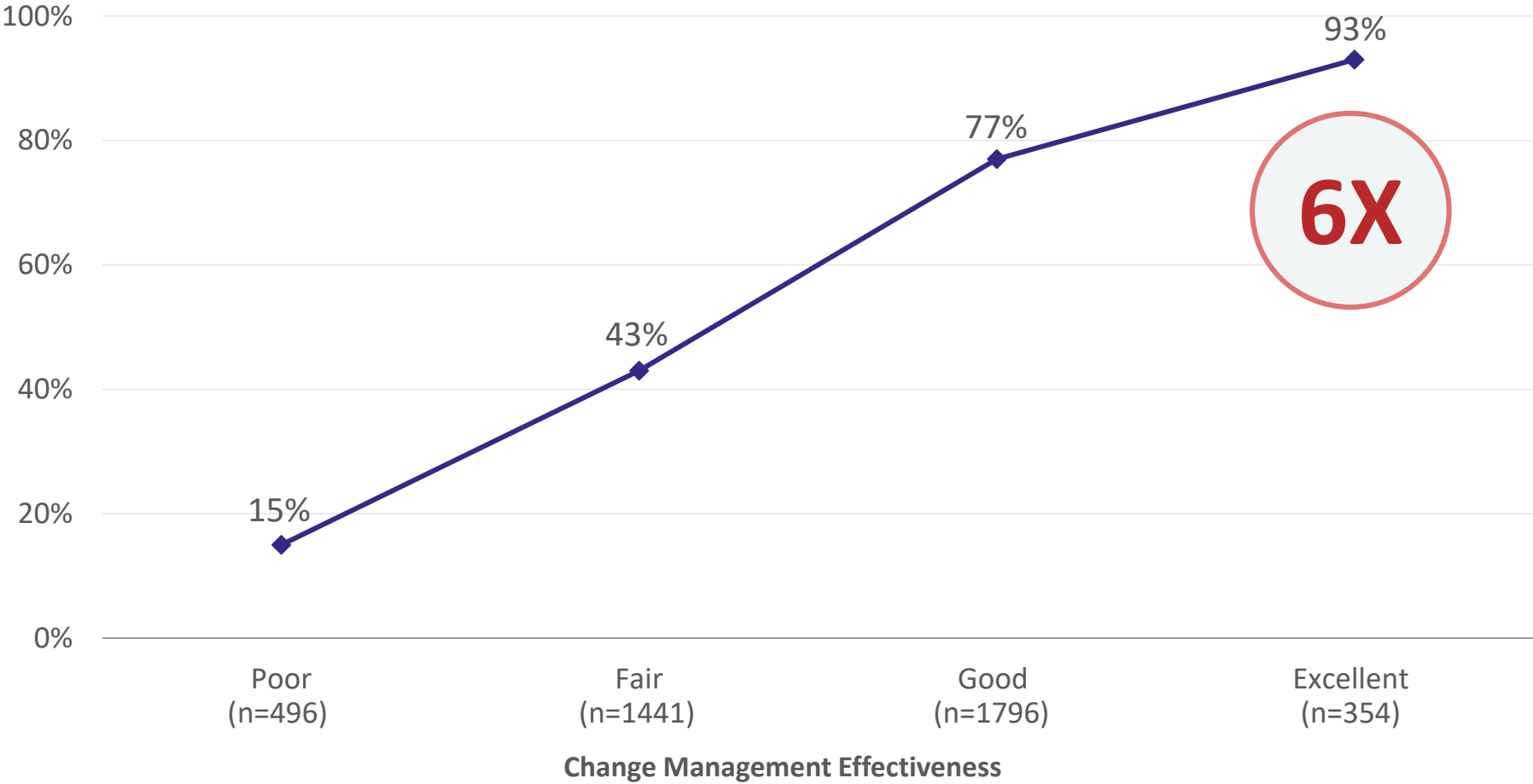How **many** employees (of the total population) are demonstrating "buy-in" and are using the new solution?

Proficiency

How **well** are individuals performing compared to the level expected in the design of the change?

Data Supports the Connection

Percent of Study Participants Who Met or Exceeded Objectives

6X

	Poor (n=496)	Fair (n=1441)	Good (n=1796)	Excellent (n=354)
	15%	43%	77%	93%

Change Management Effectiveness

Prosci 2018 Benchmarking Data
Data from 2007, 2009, 2011, 2013, 2015, 2017

How we support our customers

Customer Success Unit | Partner-CSM Program | Our Adoption & Change Management Framework | FastTrack

"Customer Success has become an **obsession** with Microsoft's sprawling cloud business... Because ultimately in a consumption-based business, **customer success is all that matters.**"

—*Microsoft CFO Amy Hood (in Forbes)*

Customer Success Unit

Create **customer-centric culture** completely focused on making customers successful

Guide customers to better **deploy, adopt,** and get real **business value** from their investment in Microsoft

Grow our cloud business through **continuous** cross-sell & upsell to increase **lifetime value** and extend the **customer lifecycle**

We will focus on **four solution areas:** Modern workplace, Business applications, Apps & infrastructure, Data & AI

ENGAGE

TRANSACT

ADOPT

GROW

Customer nurturing

New workload identification

Expansion (up-sell/cross-sell)renewal

Onboarding & time to first value

Adoption, usage/consumption

Customer Success = Microsoft Success = Partner Success

Your Customer Success Manager

Customer Success

Adoption   Business Value   Growth

| Engage in customer business value discussions and make it concrete | Discuss the success factors and agree to actions and progress management | Mutual review and update of calibration and actions | Utilize Microsoft's cross-industry best practices |

"We enable our customers to innovate and realize value
by accelerating adoption of our cloud solutions to transform their business."

FastTrack for Microsoft 365

Deploy new cloud capabilities

Onboard to Microsoft 365 services and migrate your data

Deploy chat-based collaboration and productivity apps

Enable identity, device management and modern security

Access engineering expertise

End-to-end guidance built by Microsoft engineering

Access self-serve tools and resources

Guidance delivered remotely by Microsoft engineers or approved partners

Gain user adoption

Create a holistic plan to accelerate user adoption

Proven methodologies for a successful implementation

Resources to increase capacity for change management

www.microsoft.com/FastTrack

Customers worldwide have achieved results with FastTrack

Since 2013...

60K+
Customers enabled

52K+
Success Plans created

11.2 PB
Data migrated to date

1 month Average time reduction to onboard using FastTrack

EMEA

AMERICAS

APJ
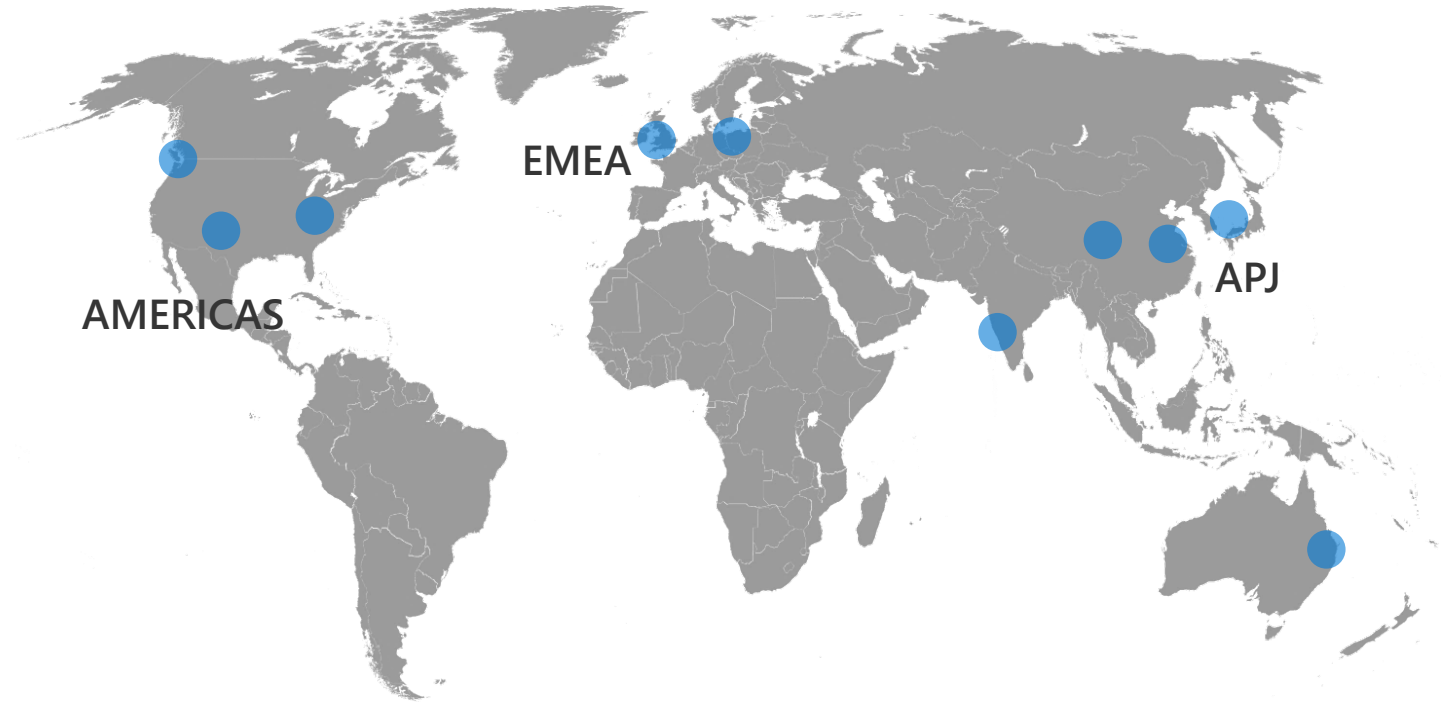
FastTrack engineers support customers in 12 languages

FastTrack digital experience in 27 languages

FastTrack approved partners provide additional scale

FastTrack for Microsoft 365 Eligibility
FastTrack is available at no additional cost as part of your eligible subscription

FastTrack portal access for self-serve planning and training

All customers

Ongoing access to FastTrack engineers or approved partners*

150+ seats

Data migration

500+ seats

* 50+ Office 365 seats have access to FastTrack services for questions and answers on Office 365;
FastTrack services for education and nonprofit plans require 1000+ paid seats;
See additional details at https://aka.ms/fasttrackservicedescription

Get started with FastTrack today

1 **Visit www.microsoft.com/FastTrack**
   Sign in for additional guidance and resources

2 **Create a success plan**
   Establish implementation and user adoption goals, tactics and strategies

3 **Get resources and ask for help**
   Review resources and submit a Request for Assistance

Additional Resources to www.microsoft.com/FastTrack

TechCommunity.microsoft.com

https://techcommunity.microsoft.com
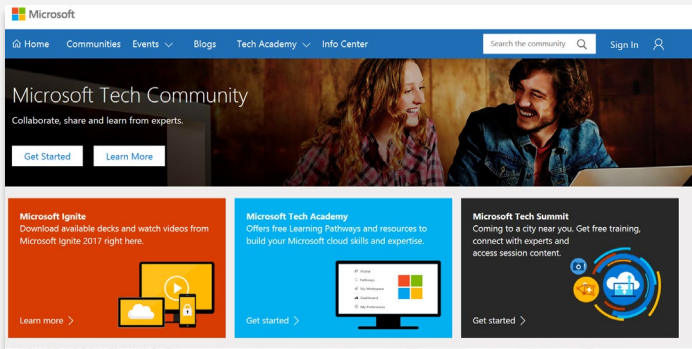
Collaborate, share and learn from experts

Docs.microsoft.com

https://docs.microsoft.com
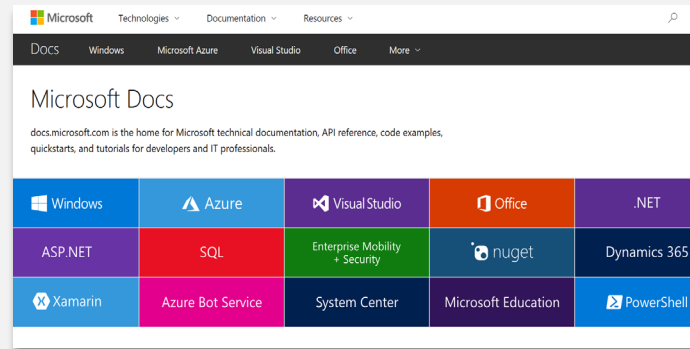
Technical documentation for developers and IT professionals

Transform.microsoft.com

https://transform.microsoft.com
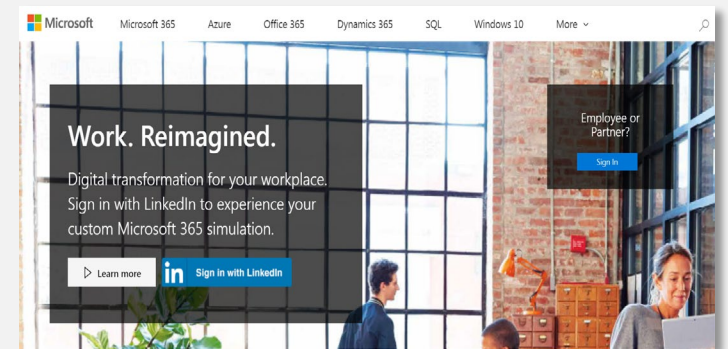
Resources to help you plan your transformation

Support.microsoft.com

http://support.microsoft.com
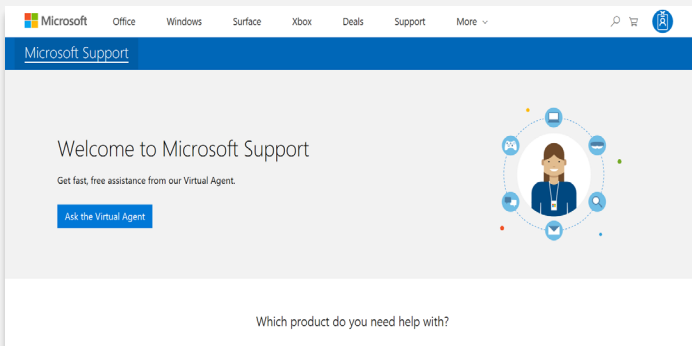
Access FAQ and support documentation

Productivity Library

http://aka.ms/productivitylibrary
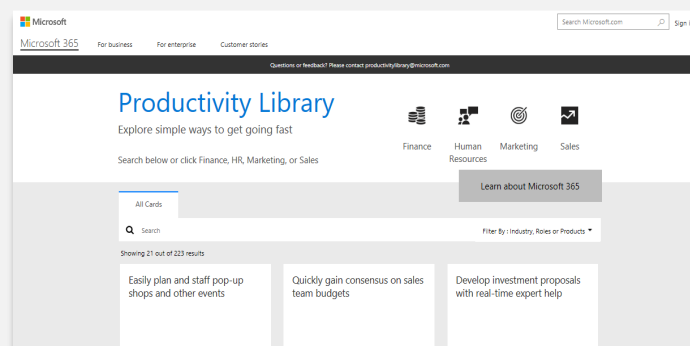
Library of scenarios with assets and training

Product websites

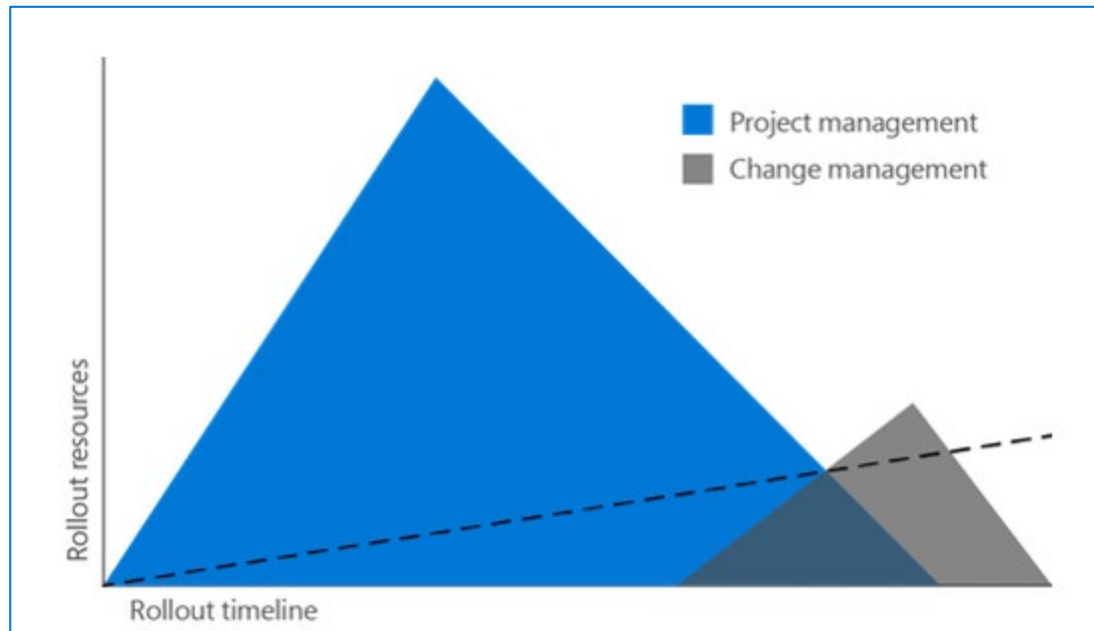
http://www.microsoft365.com
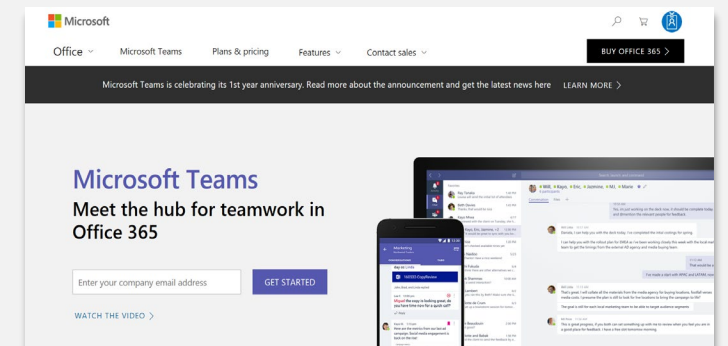
Product specific websites for additional details
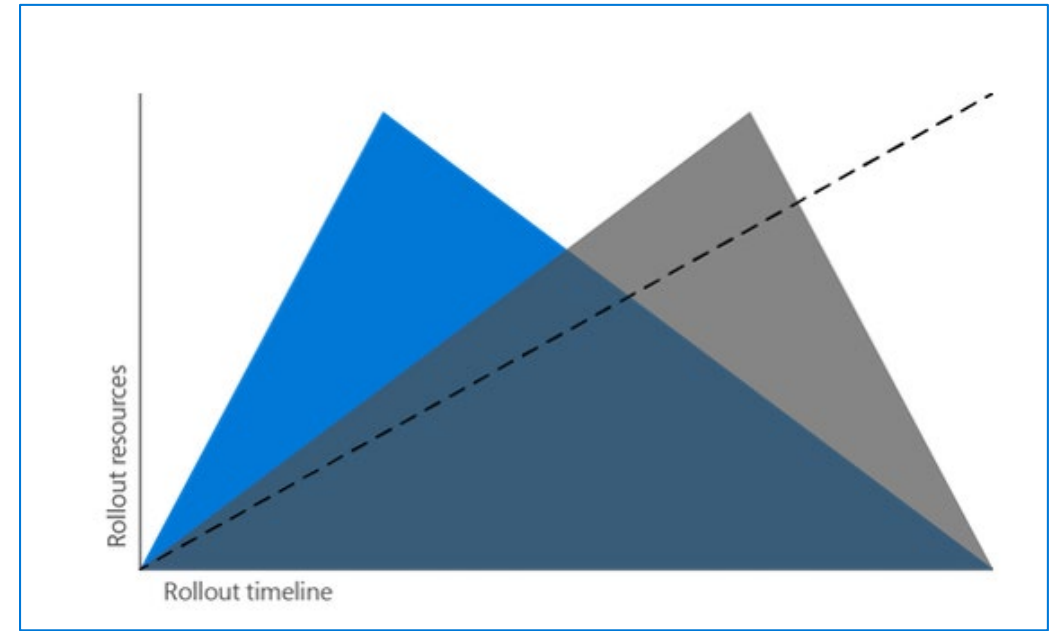
Why did we build these assets?

Common Approach

User focus is an afterthought. Rather than engaging users in the process, an email containing a link to training, for example, is sent post-deployment.

Ideal Approach

User adoption is a parallel, integrated work stream that includes deployment.

Microsoft 365 Adoption Guide

This End User Adoption Guide is a step-by-step guide for organizations interested in the most effective ways to maximize their investment in Microsoft 365.

Microsoft

Microsoft 365 End User Adoption Guide

Contents

Stakeholders

Scenarios

Awareness

Training

Plan, Implement and Manage

Microsoft 365 Success Factors for End User Adoption

LEARN AND REINFORCE

Stakeholders	Scenarios	Awareness	Training
Recruit Executive Sponsors	Prioritize Your Scenarios	Implement Comms Campaign	Train End Users
Empower Champions	Define Success Criteria	Execute Launch Events	Ready Help Desk

Microsoft 365 Adoption Guide: aka.ms/adoptionguide

Envision

- Define change scope and objectives
- Identify and prioritize scenarios and personas
- Develop detailed success plans

Define Change Scope and Objectives

- What is the desired change?
- Why is the change needed?
- Where will the change occur (geographically or organizationally)?
- Who will change?
- How will people's behavior shift in light of the change?
- When will the change need to occur to realize business benefits?

Define your success criteria

When you develop
your ideal business scenarios and solutions, it's critical to come up with a formal set of success criteria to measure the impact resulting from your Microsoft 365 rollout. You'll need to determine what should be measured, and how you will go about collecting both quantitative and qualitative data.

We recommend
that you choose criteria that will help you showcase success to leadership, such as user satisfaction, employee engagement, adoption velocity, and figures related to your desired business scenarios.

As you draft your success criteria, use the SMART mnemonic to guide you:

S — **Specific:** Clear and unambiguous; answers the questions, "What, why, who, where?"

M — **Measurable:** Concrete; clearly demonstrates progress.

A — **Attainable:** Realistic; not extreme.

R — **Relevant:** Matters to stakeholders.

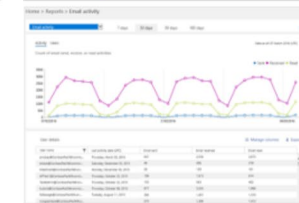**T** — **Timely:** Grounded to a specific target date; answers the question, "When?"

KPI dashboard sample to support capabilities

These graphs represent some of the reports available within the Microsoft 365 Online Admin Portal that can tie to the metrics needed to represent consumption or adoption improvements.

Activity Dashboard

Exchange

Skype

SharePoint & OneDrive for Business

Yammer
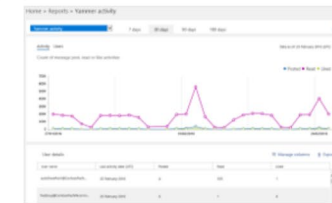
Identify and Prioritize Scenarios

Describe the ways staff will use O365 capabilities

Productivity Library
Explore simple ways to get going fast

Finance | Human Resources | Marketing | Sales

Search below or click Finance, HR, Marketing, or Sales

Learn about Microsoft 365 >

All Cards | 🔖 My Cards | Share ➤

🔍 Search all cards

Filter by: Industry, Roles or Products ▼

Showing 210 results

Interact in real time with IM, persistent chat, and presence	Increase employee engagement of firstline workers	Quickly answer guest questions from anywhere in the hotel
🔖	🔖	🔖

Prioritized Scenarios

Workshop Conducted with:

- Maureen Bousquet – VP Operations
- Julia Texieira – VP Finance
- Pedro Correa – VP Customer Service
- Alexandre Levesque – VP Sales
- Kwanjai Atitarn– Operations Manager
- Sabastien Lanctot – Shift Leader
- Astrid Panetier – Customer Account Manager
- Sylvie Lang – Customer Account Manager
- Punyaa Supitayaporn – Executive Assistant
- Maison Saucier – HR Manager

High
Medium
Low

Impact

- Smarter Meetings
- Communication and Community
- Schedule and Task Management
- Team Collaboration
- Training and Onboarding
- Discover People and Content

Low | Medium | High

Difficulty
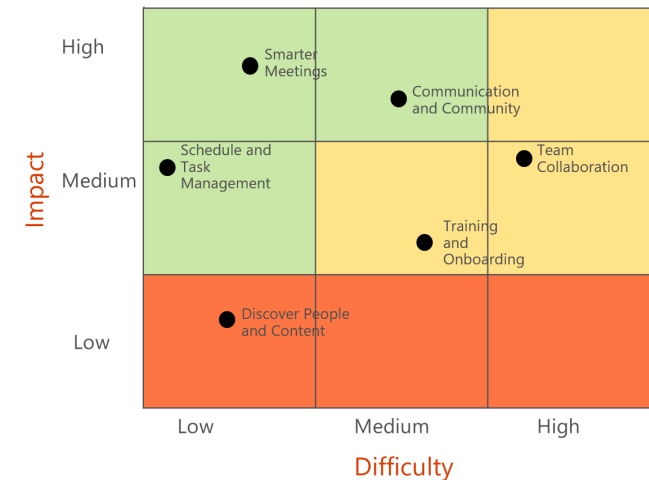
Develop detailed success plans

- Stakeholder engagement
- Communications
- Training
- Measurement
- Reinforcement

Stakeholder Engagement

The Change Network Hierarchy
Driving change across large organizations

Adoption Core Team

↳ Project Sponsor (CIO)

Adoption Extended Team

Assists development of the strategy and plans that will be executed by the Change Network

Executive Sponsor
- The face of the change
- Communicates the business WHY for the change with peers and employees
- 2 hours/month

Sponsor Coalition
- The face of the change to impacted groups
- Communicates the business WHY for the change with peers and employees
- 2 hours/month. Target 4-5 executives.

Ambassadors
- Drives change through a region or function
- Encourages employees to engage with the change
- ~4 hours/month. Target 5-10 Directors and above.

Change Champions
- Drives change at the individual level
- Helps peers become highly performant
- ~10 hours/month. Target 20-40 employees from various levels.

Managers & Supervisors
- Leads change with employees
- ~4 hours/month. Targets all employee managers.

Employees

Change Network Rules

There are three sizes of Change Network that you can choose:

- **Foundational Change Network:** You have to have a minimal change network that includes sponsors and managers, or you will not get strong business adoption of the technology
- **Adding Peer-Level Expertise:** You can expand one level to add a broad group of users who are trained to help their colleagues adopt new ways of working using the technology
- **Adding Mid-Level Leaders:** You can expand one final level to add a group of Directors (or Vice Presidents in a large company) whose job is to help move the change forward in a region or function

Adding Mid-Level Leaders

Ambassadors

Adding Peer-Level Expertise

Change Champions

Foundational Change Network

| Executive Sponsor | Sponsor Coalition | Managers & Supervisors |

Communications

Communication Summary – Sales, Customer Service, Finance and Support Teams

T-7 Weeks	T-6 Weeks	T-5 Weeks	T-3 Weeks	T-1 Week	Service Available	T+1 Week	T+ 2~12 Weeks
• All company email (delivered by **Maureen Bousquet**). First touch event outlining the business reason for change and the approach that is being undertaken . • Introduce the Ambassadors and Change Champion program • Introduce the availability of the web site and outline how this will include answers to common questions. • Tell them who they need to contact with issues or questions.	• Give users a similar communication to the T-4 week version, which is intended to remind them of the business reason for change (delivered by Sponsors e.g. **Pedro Correa, Alexandre Levesque and Julia Teixeira**) – Personalized for each community. • Senior Managers communication to teams – continuing the theme - business reason for change outlining specific impact (leverage Perso and Workforce analysis) • Announce Auditorium eve	• Maureen Bousquet deliverer All hands briefing (face to face) • Managers begin communicating directly with employees using Face to face team meetings and support by email (where appropriate) • Initial Posters made available	• Auditorium Training • Poster refreshed	• 2nd Auditorium Training • Poster refreshed • Brown Bag sessions delivered • Online / on demand training available	• Early Adopter video • Lunch and Learn • Tips and Tricks • Podcast (per community) delivered by Sponsor	• Lunch and learn • Posters refreshed • Rewards winners notified • Rewards announcements included in Newsletter	• Lunch and learn • Posters refreshed • Reward winners notified • Reward announcements included in Newsletter

Key Tactics and Senders by Audience and Project Phase

This is the full set of Adoption Tactics (and relevant message senders) by project phase for each audience.

	T-5 Weeks	T-3 Weeks	T- 1 Week	Project Phase 1	Project Phase 2	Project Phase 3	T+ 1~6 Week
Sponsors	T1–First Touch Event T9–Newsletter		T6-Webcast	T9-Newsletter T9 Podcast	T3-Power Team	T9-Newsletter	T3-Team Superstars! T3–Outstanding change Champion T3-Pinnacle Award T9-Newsletter T3-Spot Award
Managers			T4-Brown Bag	T3-Spot Award	T3-Spot Award T4-Brown Bag	T3-Spot Award	T4-Spot Award T4-Brown Bag
Ambassadors		T2-Auditorium Training	T2-Auditorium Training	T3-Best Coach T5-Lunch & Learn	T3-Best Coach T5-Lunch & Learn	T3-Best Coach T5-Lunch & Learn	T3-Best Coach T5-Lunch & Learn
Change Champions			T2-Auditorium Training	T7-Tips and Tricks	T7-Tips and Tricks	T7-Tips and Tricks	T7-Tips and Tricks
Supporting Tactics (CM Team publish)	T10-Website		T8-Online / On-demand training	T8-Online / On-demand training	T8-Online / On-demand training	T8-Online / On-demand training	T8-Online / On-demand training

Training

Target Audiences Identified

Communitiess from Work Force Analysis Persona Prioritization

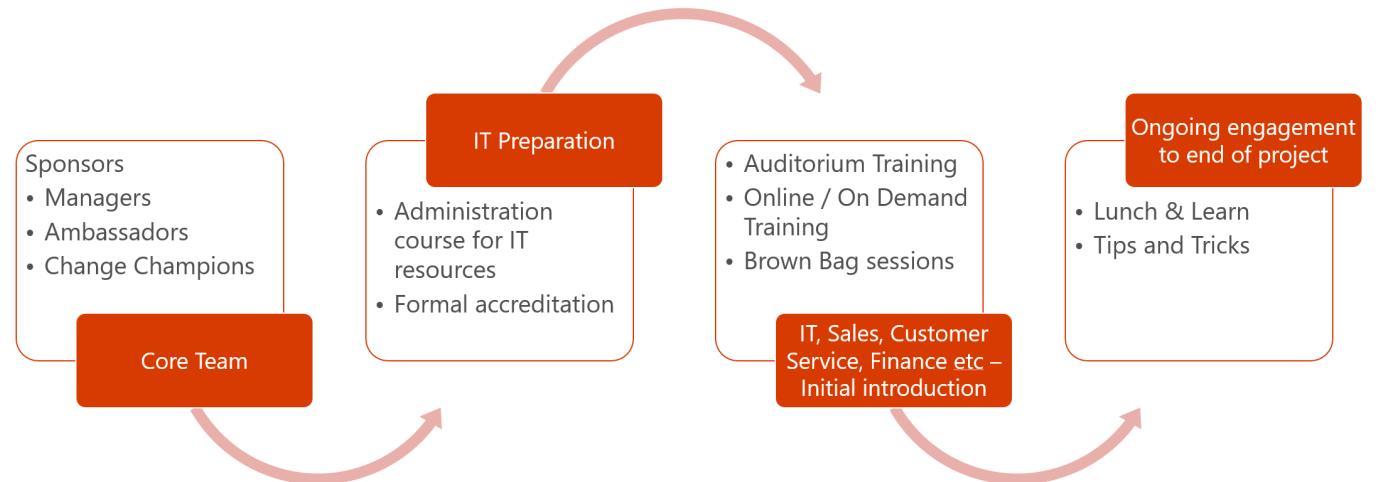- Sales
- Customer Service
- Finance and Support Teams
- IT

Audiences who will drive the change forward (Change Network Team)

- Sponsors
- Managers
- Ambassadors
- Change Champions

Support Organizations
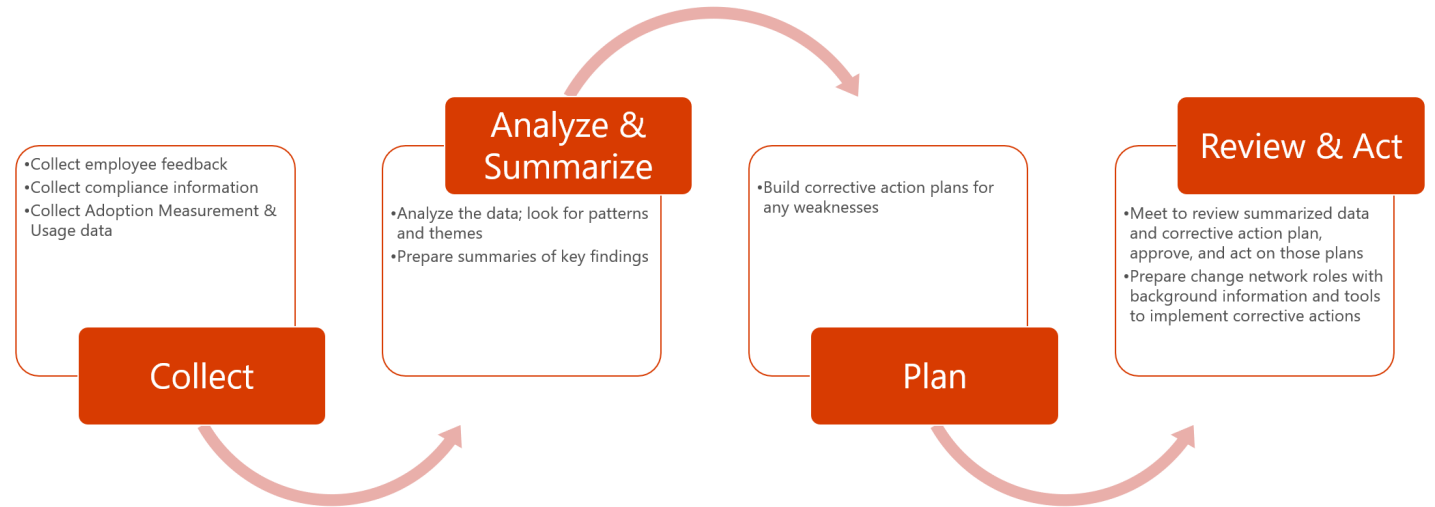
- IT operations
- HR

Recommended Training Roadmap

Sponsors
- Managers
- Ambassadors
- Change Champions

Core Team

IT Preparation

- Administration course for IT resources
- Formal accreditation

- Auditorium Training
- Online / On Demand Training
- Brown Bag sessions

IT, Sales, Customer Service, Finance etc – Initial introduction

Ongoing engagement to end of project

- Lunch & Learn
- Tips and Tricks

Measurement

Business Outcome Scorecard

Goal			Measurement				
Business Value	Type of Value	Business Owner	KPI Measure	Data Source (leverage the Adoption Content Pack for O365)	KPI Formula	KPI Baseline	KPI Target
Enabling additional customer engagement through online meetings.	Increase sales	Alexandre Levesque	Number of meetings setup and conducted	Skype for Business	Number of meetings online / Number of meetings	5%	55%
Increase customer engagement and employee satisfaction (reduced travel time)	Reduce costs	Alexandre Levesque	Number of meetings setup and conducted	Skype for Business and an Employee Poll or survey	Number of meetings online / Number of meetings Average stated employee satisfaction	35%	70%
Increase access to information and the ability to share best practices and learn from each other	Increase sales / Reduce costs	Pedro Correa	Reduce % time, cost to create customer ready content	Yammer and SharePoint Data	Number of engaged members / Total number of members. IP Count	45%	80%
A safe and open collaboration approach for easy sharing of messages and news between employees	Increase sales	Maison Saucer	Percentage of groups that are active	Yammer Data	Number of engaged members / Total number of members Number of new posts Number of new executive posts	0%	65%
Provide a consistent, modern Schedule and Task management application for Managers, Shift leaders and employees	Reduce Costs	Maureen Bousquet	Schedules in tool	Staffhub Data	Number of people whose shifts in the tool/Total number of people on shift patterns	25%	90%
Improve timeliness and effectiveness of meetings enabling faster decision making	Increase sales	Alexandre Levesque	Number of meetings	Teams Data and an Employee Poll or Survey	% of employees engaged. Average effectiveness stated by employees	10%	85%

1. Enabling additional customer engagement through online meetings.

KPI Measure / Name	• Number of meetings setup and conducted
KPI Reporting Frequency	• Monthly
KPI Formula	• Number of Online Meetings / Total Number of Meetings
Data Sources	• Office 365 Service
Data Gathering, Transformation, & Analysis Process	• Examine the Communication report within the Adoption Content Pack and determine the total number of meetings conducted in Teams/Skype for Business
Data Gathering Instruments	• Power BI adoption content pack for Office 365
Data Gathering Owner	• Philippe Chauvin to identify named resource within IT to produce and share the report

Reinforcement

Feedback and Analysis Loop

Collect
- Collect employee feedback
- Collect compliance information
- Collect Adoption Measurement & Usage data

Analyze & Summarize
- Analyze the data; look for patterns and themes
- Prepare summaries of key findings

Plan
- Build corrective action plans for any weaknesses

Review & Act
- Meet to review summarized data and corrective action plan, approve, and act on those plans
- Prepare change network roles with background information and tools to implement corrective actions

Program Reward List (until T+12 weeks)

Number	Reward Theme	Reward Name	Reward Selection / Nomination Approach	Reward Eligibility	Reward Frequency	Reward Selection Process	Reward Amount and Trophy	Reward Recognition Approach	Budget Requirements
1	Cross-Team Collaboration	Team Superstars!	Managers	Not Won Before	Monthly	Sponsor Coalition Approval	Plaque + Front Page News + $1,000 Team Morale Funds	Newsletter highlight + Sponsor on-stage handshake at key meeting	3 x $1,100
2	Outstanding use of the technology	Innovator Award	Change Network nomination	Not Won Before	Every two weeks	Adoption Extended Team Approval	Plaque + Front Page News + $200 cash	Newsletter highlight + GM on-stage handshake at dept. meeting	6 x $250
3	Outstanding individual support to community outside of change network	Pinnacle Award	Peer recognition	Not Won Before	Every two weeks	Adoption Extended Team Approval	$100 gift certificate	Newsletter highlight + GM on-stage handshake at dept. meeting	6 x $100
4	Outstanding change champion	Best Coach	Ambassadors	Not Won Before	Monthly	Sponsor coalition approval	Lunch with sponsor coalition member	Newsletter highlight + GM on-stage handshake at dept. meeting	N/A
5	Individual made a difference	Spot Award	Managers	Not Won Before	Weekly	Adoption Extended Team Approval	$100 gift certificate	Manager email + newsletter highlight	12 x $100
6	First team to full adoption	Power Team	Project team nomination	First team fully adopting the top four scenarios from the Work Force Analysis	As required	Sponsor Coalition Approval	Plaque + Front Page News + $1,000 Team Morale Funds	Newsletter highlight + GM on-stage handshake at dept. meeting	4 x $1,100
			Total Budget Requirements						**$11,000**

Onboard

- Implementation guidance and schedule
- Stakeholder engagement delivery
- Communications delivery
- Training delivery

Office 365 Change Management Framework for Partners

An approach to help you drive successful Office 365 adoption

Adoption, noun adop·tion \ ə-ˈdäp-shən \

When an individual chooses to accept and habitually demonstrate a new way of thinking or behaving, such that benefits can be realized from a change.

What's the driving force behind adoption? *Change management.* A discipline that applies a framework and set of tools to transition people from a current state to a future state to achieve expected benefits and organizational objectives.

To implement Office 365 in customer environments, you'll need to employ two complementary disciplines to help your customers make a successful transition: project management and change management. Project management focuses on deployment planning and the execution of Office 365 technical component. Change management—the human side of the transformation—focuses on the activities required to prepare organizations for the delivered change. To facilitate the transition from the old way of working to the future state. And to embed the change as the new norm.

Phase one: Envision	Phase two: Onboard	Phase three: Drive Value

Fully aligned with your technical deployment activities and plans, the *onboard* phase delivers the plans you created during the envision phase, and includes all activities up to the Office 365 service launch. All impacted users should be trained and as capable as possible with their specific new ways of working **prior to** the launch.

In the *onboard* phase, you'll find these components:

- Implementation guidance and schedule
- Stakeholder engagement delivery
- Communications delivery
- Training delivery

Stakeholder engagement delivery

Onboard Phase: Key Sponsorship Activities

Target for Executive Sponsor	Activities for Executive Sponsor
Project Team	Maureen Bousquet (Executive Sponsor) continues to be actively engaged in formal project reviews with Theodore Margand (CM) and Gaby Bosse (PM)
Senior Executives & Managers	Maureen Bousquet (Executive Sponsor) will continue to drive engagement, taking the pulse of the organization's executives and management, and providing it back to Theodore Margand (CM)
Impacted Users	Theodore Margand (CM) will help Maureen Bousquet (Executive Sponsor) to: • Describe the current state of the business and share the business issues or opportunities • Explain why a change is needed now; share the risks of not changing • Share a vision for the future; explain the nature of the change and show how the change will address the business problems or opportunities • Answer the question "What will this change mean to me?" • Be proactive, vocal and visible; communicate frequently, including face-to-face

T-4 weeks

Adoption Core Team
- Core team adjusts plans and created assets based on feedback and localization guidance
- Core team actively supports all change network roles, actively engaging and responding on relevant Yammer groups and to incoming emails, providing private coaching where applicable
- Theodore Margand (CM) personally supports all sponsors in executing CM activities, providing coaching and guidance as necessary

Executive Sponsor
- Theodore Margand (CM) will support Maureen Bousquet (Executive Sponsor) to continue meeting in public and private with business leaders and senior managers to drive messaging and resolve issues
- Maureen Bousquet (Executive Sponsor) continues to execute CM Communications Plan activities
- Maureen Bousquet (Executive Sponsor) continues to be actively engaged in formal project reviews with Theodore Margand (CM) and Gaby Bosse (PM)

Sponsor Coalition
- All coalition members continue to actively and visibly drive engagement, execute CM communications plan activities, manage resistance, remove blockers, and take the pulse of their organization, providing it back to Theodore Margand (CM) and Maureen Bousquet (Executive Sponsor)

Ambassadors
- Attend Ambassadors bi-weekly review meeting run by Theodore Margand (CM) to provide feedback on issues and resistance, and the overall progress of adoption
- Continue communicating, evangelizing personal use of the technology and features, and answering questions
- Continue providing feedback via CN Ambassadors Yammer Group

Change Champions
- Begin to execute Group Coaching plans
- Answer peer questions and provide guidance on appropriate topics
- Evangelize personal use of the technology and features, explaining the productivity and efficiency benefits achieved
- Provide feedback via CN Change Champions Yammer Group

Managers & Supervisors
- Continue communicating, evangelizing personal use of the technology and features, answering questions, and managing employee resistance
- Continue providing feedback via CN Managers Yammer Group

Communications delivery

Communications tactics plan timeline

Phase	Awareness			Availability	Usage		Adoption
Tactic	T-60	T-30	T-7	T	T+7	T+30	T~
Newsletter	●	●		●		●	●
Posters		●	●	●	●	●	
First touch event		●					
Brown bag sessions			●		●	●	
Early adopter video				●			
Auditorium training			●				
Online/On-demand training			●	●	●	●	●
Lunch and learn			●	●	●	●	
Tips and tricks				●			
Awards and certifications				●	●	●	●
Website		●	●	●	●	●	●

Training delivery

Sales Training Recommendations

Recommended Modalities

- **Face-to-face training** – Auditorium Training
- **Web-based training** – Early Adopter Video Online Training (OLT)
- **Self-paced training** –Frequently Asked Questions (FAQ) sheets
- **On-the-job training** – Change Ambassadors and Change Champions, online support
- **Other examples** – Posters

Recommended Reuse of Existing Source Material

- Office 365 training materials, contextualized for Personas and Scenarios.

Recommended Timing

- T-3 Week and T-1 Week – Auditorium Training
- T-1 Online / on demand training
- T-0 Lunch and Learn sessions
- T-0 Tips and Tricks

Recommended Resources to Scope, Develop, and Deliver Training

- Office 365 Training Materials (see Productivity library on Fast Track).
- Persona and Scenario analysis.

Drive Value

- Measurement delivery
- Reinforcement delivery

Office 365 for Partners   Training   Events   Resources   News

Office 365 Change Management Framework for Partners

An approach to help you drive successful Office 365 adoption

Adoption, noun adop·tion \ ə-ˈdäp-shən \

When an individual chooses to accept and habitually demonstrate a new way of thinking or behaving, such that benefits can be realized from a change.

What's the driving force behind adoption? *Change management*. A discipline that applies a framework and set of tools to transition people from a current state to a future state to achieve expected benefits and organizational objectives.

To implement Office 365 in customer environments, you'll need to employ two complementary disciplines to help your customers make a successful transition: project management and change management. Project management focuses on deployment planning and the execution of Office 365 technical component. Change management—the human side of the transformation—focuses on the activities required to prepare organizations for the delivered change. To facilitate the transition from the old way of working to the future state. And to embed the change as the new norm.

Phase one: Envision	Phase two: Onboard	Phase three: Drive Value

Continuing focus on change execution, management, and monitoring implementation, the *drive value* phase looks at how your customers' organization can sustain the change.

In the *drive value* phase, you'll find these components:

- Measurement delivery
- Reinforcement delivery

Measurements framework

Based on the scenario, it is important to identify a baseline of usage of the scenario. By identifying goals to drive adoption, you can identify goals to improve (Good, Better, Best) and measure accordingly. As you move from Good to Better, new plans can be driven to help drive adoption in that area and move up in maturity.

The capability areas include technologies that are part of the scenario. Each scenario is comprised of multiple technologies when focusing on scenario-based activities, so identifying these can be critical in identifying which metrics to focus on.

Benefit areas are then quantified based on the metrics or goals you have. These can be equated to a specific benefit area and measured over time to increase the value to the organization.

Scenarios

Benefit areas

☑ Agility ☑ Quality of service

☑ Financial ☑ GRC

Capability areas

☑ Email (Exchange) ☑ Real-time communications (Skype)

☑ Collaboration (SharePoint) ☑ Enterprise social (Yammer)

Measurement maturity

☑ Current methods ☑ Good

☑ Better

☑ Best

Office 365

KPI dashboard sample to support capabilities

These graphs represent some of the reports available within the Microsoft 365 Online Admin Portal that can tie to the metrics needed to represent consumption or adoption improvements.

Activity Dashboard
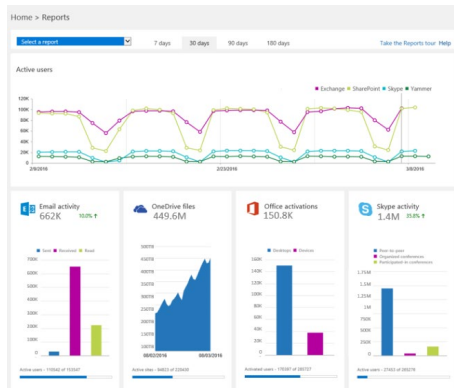
Exchange
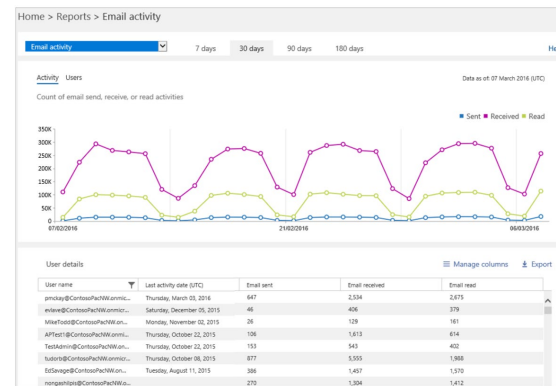
Skype
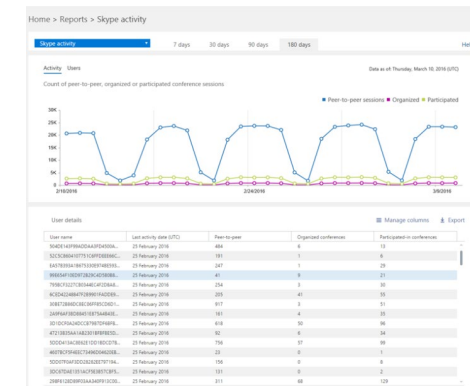
SharePoint & OneDrive for Business
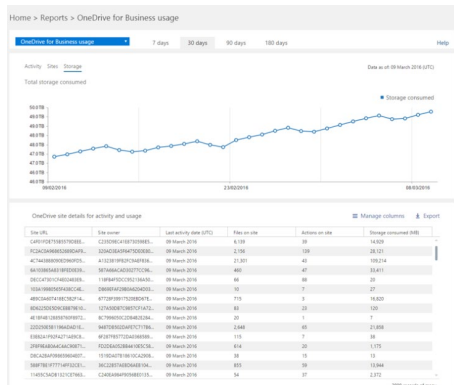
Yammer
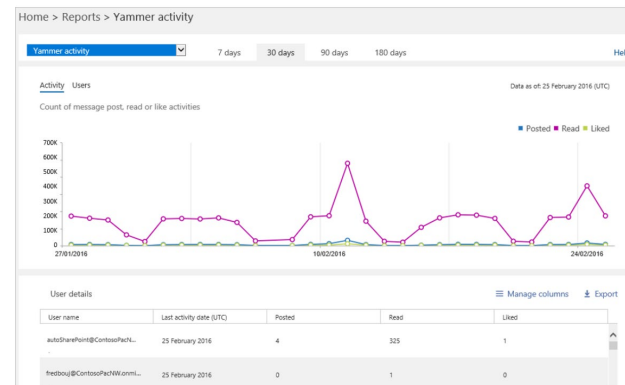
Assess user satisfaction through surveys

At any point throughout your rollout, you're encouraged to distribute <u>satisfaction surveys</u> to gather data about your users' knowledge of and sentiment towards the new Microsoft 365 workflows. The results will help you determine how successful the rollout has been and start thinking about how you can put this feedback into actionable next steps.

Here are some suggestions for surveying end users during your launch:

Early adoption program

→ Circulate a baseline survey shortly before champions participating in your pilot receive activated accounts and devices, to gather data about their knowledge of Microsoft 365.

→ Release a survey halfway through your pilot to gather data about champions' experiences with Microsoft 365, and use the results to make any adjustments prior to a general rollout.

→ Use a final survey immediately after the champions pilot period to determine whether you need to make further adjustments to your general training and awareness materials.

Full launch

→ Circulate a baseline survey shortly before users receive activated accounts and devices, to gather data about their knowledge of Microsoft 365.

→ Release a survey halfway through your launch to gather data about users' experiences with Microsoft 365 and use the results to make any necessary adjustments.

→ After your organization-wide rollout, use a final survey to assess user satisfaction with the rollout process. You can release this survey 90 days after launch, and then in quarterly increments to help measure user adoption from a satisfaction and productivity standpoint.

Capture qualitative successes

Success stories
are oftentimes just as valuable as quantitative measures when demonstrating Microsoft 365 success. Throughout your rollout, have your project team members and champions identify examples demonstrating cross-functional collaboration and teamwork. They can do this simply by surveying end-users about the personal value they have achieved and how Microsoft 365 is helping them meet their goals.

Using Yammer
you can easily tag conversations with a topic (such as #M365win) to follow their progression. When doing an analysis of the rollout, search for the topic to quickly surface the conversations demonstrating business value.

An employee on the night crew flags a non-routine problem

Other stores across the country confirm the problem

An executive acknowledges the issue

The problem is resolved

Charleston

Dallas

Salt Lake City

Phoenix

Chicago

David Hamilton
To All Company
The packaging of the new juice bottles is really poor quality. They are difficult to remove from the pallet, and they're not easy to place on the display. We've got bottles rolling all over the place. This isn't making for a great customer experience.
Like · Reply · Share · More · 3 hours ago

Michael Pereira
I agree. We're having the same problem at our store. We've actually lost a few bottles because they are challenging to handle.
Reply · Like · Share · More · 2 hours ago

Yukako Souza
The bottles break very easily, too. The manufacturer didn't appear to take into consideration how hard these are to hold when they designed the packaging.
Reply · Like · Share · More · 2 hours ago

April Reagan
We've lost 2-3 packages of juice in the last 2 days. Each package of juice costs us $40 in sales. We really can't afford to be presenting poor quality like this to our customers.
Reply · Like · Share · More · 2 hours ago

Antonio Alwan
Thank you for bringing this quality issue to our attention. I lead our Manufacturing and Sourcing teams. Vandelay is our supplier of this juice, and we have made them aware of the issues you are describing. We hope to have a resolution quickly. Thanks again for your feedback and please feel free to reach out to me with questions.
Reply · Like · Share · More · 2 hours ago

Antonio Alwan
Update – I just talked to our point of contact at Vandelay. They are concerned about these reports and have already put some plans in place to rectify the situation. They indicated that we can expect future shipments to be easier to handle and stock. Thank you for alerting us to this malfunction so we could react to it more quickly.
Reply · Like · Share · More · 4 minutes ago
👍 Jenny Liu, Peter Connelly, April Reagan and 4 others like this.

37

Share stories

Capturing and sharing stories

about your Microsoft 365 successes is one of the best ways to demonstrate business value.

When sharing a story about your experience with Microsoft 365, be sure to include these details:

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 has happened.

Stories about business value can easily be shared

internally through an Microsoft 365 Success Stories group in your Yammer network. You can also share success stories externally with the wider Microsoft 365 community via the Microsoft 365 Network and use them to make feature-function training more relevant.

Trainers should also use

these success stories to make feature-function training sessions relevant to end-users.
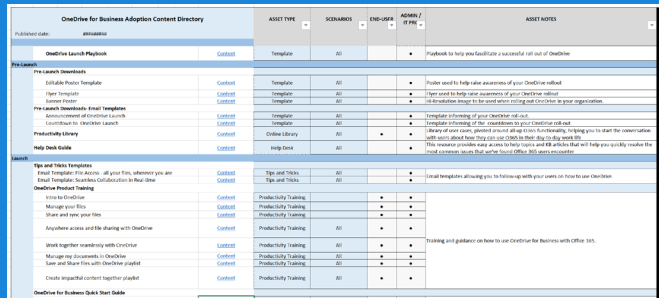
Iterate

Your adoption journey doesn't end after launch day nor after measuring your launch impact. **Driving adoption is a continuous cycle and you should constantly be looking for new ways that Microsoft 365 can add business value to your organization to keep up with the evolving needs of your users.**

☐ Use the insights from your evaluation process to kick off additional trainings to educate users about best practices and high-impact Microsoft 365 solutions.

☐ Organize additional business scenario and solutions development sessions with more departments in your organization (refer to http://aka.ms/ProductivityLibrary for example scenarios). Afterwards, hold departmental trainings where you explain how Microsoft 365 can drive success for each particular business line.

☐ Periodically host additional engagement events, such as town hall style meetings or lunch and learns, to drive engagement in your network. Go back through Launch an Awareness Campaign to help you brainstorm event ideas.

☐ Make sure to encourage your users and champions to develop ideas for how Microsoft 365 can improve business practices and to share them with others via a Yammer group. Use these ideas to generate additional solutions and kick off additional trainings.

Next steps

- **Start with FastTrack, visit microsoft.com/fasttrack**
- **Use our adoption kits (OneDrive, Teams, …) support.microsoft.com**

- **Install Outlook Mobile & Kaizala**
- **Contact your partner for M365 deployment & adoption**

- **ine.princen@microsoft.com**

Thank you!

ine.princen@microsoft.com