



The Definitive Guide To Improving Microsoft 365 Adoption

WRITTEN BY | Richard Harbridge & Kanwal Khipple

Whitepaper

YOU WILL LOVE THE WAY WE WORK. TOGETHER.



Table of Contents

1. INTRODUCTION 5
1.1. Our Approach To Microsoft 365 Success Planning..... 6
2. DRIVING TECHNOLOGY ADOPTION..... 8
2.1. We Need Sustained Commitment 8
2.2. Tracking Overall Adoption State..... 9
Adopted State 10
Engaged State 10
Embedded State 10
2.3. Challenges With Enterprise Technology Adoption 11
Accelerating the change curve..... 11
Change isn't easy. It needs our help. 12
So how do we help encourage change?..... 13
What are examples of how people need to change?..... 13
2.4. Early Adoption Success Questions..... 14
2.5. Pre-Work Recommendations..... 15
3. ADOPTION CAMPAIGNS 17
3.1. Time Boxing Your Campaign(s)..... 17
3.2. What's Required & Recommended?..... 18
3.3. Tip Team & Daily Tips 19
Identifying & nominating your tip team..... 19
What should be in a tip? 20
How are tips connected to training, challenges, and communication?..... 21
3.4. Communication Planning 21
What are some key communication messages? 23
3.5. Branding & Messaging 24
3.6. Training 25
3.7. Contests, Challenges & Ideas..... 26



- What are some examples of Microsoft 365 contests?26
- What are some examples of Microsoft 365 challenges?.....27
- What are some examples of Contest rewards and prizes?27
- Communicating prize milestones, winners & contest information29
- What are some examples of Microsoft 365 activities/ideas that also improve a campaign's effectiveness?.....29
- 3.8. Targeting Personas & Groups Of Users.....32
 - Identifying & Developing Personas.....33
 - Identifying Value Opportunities/Needs Alignment with Microsoft 365 For Personae.....34
 - New X User34
- 3.9. Incorporate Other Initiatives.....35
- 3.10. Measure The Impact.....35
- 4. ADDITIONAL ADOPTION ACTIVITIES37
 - 4.1. Phases of Microsoft 365 Workload Rollout.....37
 - 4.2. Leadership Activities: Making Microsoft 365 Successful.....38
 - 4.3. Awareness Activities: Helping People Use Microsoft 36541
 - 4.4. Education Activities: Helping People Understand the Value of Microsoft 365.....51
- 5. ADOPTION ACTIVITIES CHECKLIST.....63
 - 5.1. Pre-Launch.....63
 - 5.2. Launch66
 - 5.3. Post-Launch & Ongoing67
- 6. RECOMMENDED NEXT STEPS69
- 7. SOURCES AND RESOURCES70
 - 7.1. Our Whitepapers & Related Resources70
 - Most Common SharePoint and Teams Sprawl Issues and How to Find Them.....70
 - SharePoint Migration70
 - External Sharing With Office 365: What You Need To Know70
 - Measuring the Business Impact & ROI of Office 365.....71



- Microsoft 365 Intranets: What You Need To Know.....71
- “When to Use What” In Office 365.....71
- 7.2. Recommended Industry Perspectives72
- Tipping our hat to other industry experts.....72
- 8. About 2toLead74
- Awarded Experience, Here to Help.....74
- Top 3 Ways 2toLead Helps Customers74

1. INTRODUCTION

Organizations adopt Microsoft 365 to improve their employees' productivity and ability to collaborate. When users adopt Microsoft 365, they are better able to work anywhere and on any device. When users adopt Microsoft 365, they can collaborate and share more effectively, in a responsible way, with partners, customers, or colleagues. The great thing is that as users adopt Microsoft 365, the organization also benefits. The IT department benefits from simplified compliance with archiving, in-place legal holds, information rights management to keep documents secure, and a robust enterprise-grade platform that provides advanced IT controls.

So, where's the catch? Why does a whitepaper like this exist? To realize (or maximize) the enormous benefits employees must successfully adopt Microsoft 365.

Decades of enterprise technology deployments have taught us that for a user to adopt technology like Microsoft 365 successfully, they need to understand it, see its value, and how to best use it. However, they also need to change the way they work. Due to improvements in technology, some tasks that are historically done a certain way are now inefficient. This is especially the case when compared with how some tasks can be done far more effectively by working together. Productivity can be significantly improved by leveraging each other's experiences and by working more collaboratively.

Change isn't easy. With proper planning and activities, we know that we can accelerate and guide change. With the right effort, we can increase the adoption of Microsoft 365 and help foster the new behaviors that technology enables. In this whitepaper, we will explore why change is challenging and provide prescriptive advice and guidance on maximizing not only your employee's adoption of Microsoft 365 but also how to best leverage the platform's capabilities.

1.1. Our Approach To Microsoft 365 Success Planning

2toLead uses an adoption framework to plan Microsoft 365 success. We have found that by investing in key areas, a customer can significantly improve Microsoft 365 adoption and its impact. What follows is a simple diagram (*Figure 1*) that helps communicate the areas we encourage customers to invest in.

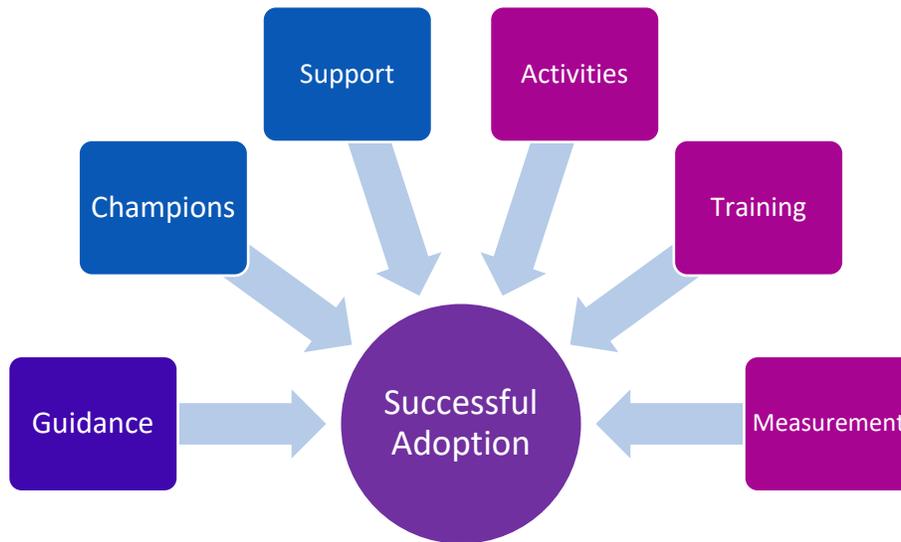


Figure 1 – Investment focus areas that can be used to improve technology adoption.

Technology governance and adoption is a vast subject that is potentially time-consuming for any organization to tackle. Our approach is to present and educate each customer on best practices in the context of their organization. The intent is to provide the guidance and tools you need to successfully deliver and implement a practical and achievable Microsoft 365 strategy.

To ensure greater success with Microsoft 365, we recommend every organization follow a few key steps to improve adoption strategy and planning:

1. **Understand the importance of Governance and Adoption** and how they impact success with Microsoft 365.
 - *You can start by reviewing our whitepaper resources, presentations, and articles - but be sure to reach out if you are looking for a more detailed 1:1 overview.*
2. **Assess your current state and where gaps exist** or identify areas where changes and improvements are needed.

- *If you are looking for a quick start, try reviewing and completing our Microsoft 365 success readiness questionnaire (available at <http://office365resources.com/>) with key stakeholders in the organization.*
 - *Depending on the recommendations/next steps identified in the internal review process (aided by our questionnaire), be sure to review with experts in the industry (like 2toLead) to understand recommendations for closing key governance and adoption gaps.*
3. **Prepare and commit to a comprehensive plan and roadmap for Microsoft 365** with new insight based on the recommendations you have identified.
 4. **Finalize and implement related missing or out-of-date policies and procedures** and provide better guidance and communication to your organization as you execute your Microsoft 365 plan.
 - *You will learn more about your current state and the state of your users as you execute your plan. Be sure to allow for ongoing feedback and insight to leverage in revising your plan or re-establishing your current state.*

When the key steps outlined above are complete, it will be important to revisit your understanding of the current state of readiness and Microsoft 365 capability that exists within the organization.

When approaching Governance and Adoption planning, it often can be cyclical. You start by reviewing and understanding current readiness and capability, developing a clear plan of action to improve things, executing that plan, and then assessing the new readiness and capability based on your changes. This leads to identifying further opportunities to improve and repeats the cycle (as there are always more ways an organization can improve – and there are always new capabilities being delivered within Microsoft 365).

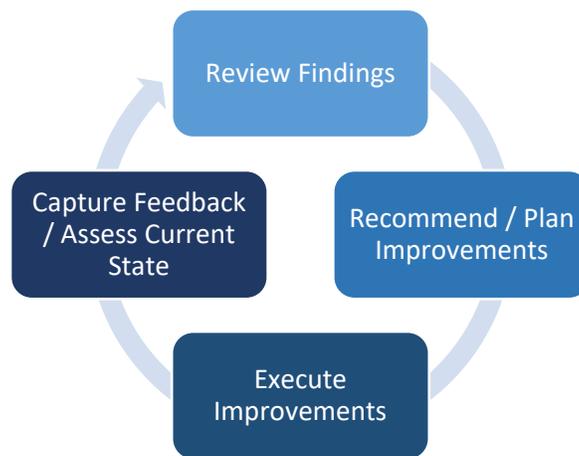


Figure 2 - Common governance & adoption cycle.

2. DRIVING TECHNOLOGY ADOPTION

Getting more people to use technology is important. Often getting people to use **more of** the technology is just as important, if not more important, than getting them to use it. Successful adoption isn't measured in infrequent and basic use of technology; it's measured in impact and maximizing the benefits the technology provides on an ongoing basis.



**Successful adoption is about more than just usage.*

To help drive successful adoption, you need to drive user awareness and guide user understanding. Within this document, you will find suggestions to improve both awareness and guidance through the use of carefully crafted adoption campaigns, tips, contests, challenges, and activities.

2.1. We Need Sustained Commitment

Remember this statement: "When your users can't decide what technology or feature to use, they use what they know, or what's easy, even if better options exist." Our goal is to help them make better decisions, but that requires them to invest in improving. Since it's not a one-time change but a continual change, we also need the individuals looking to improve to sustain that commitment to improvement.

Additionally, as technology changes, our understanding needs to change as well. We need to be aware of what new methods and approaches can be used, what we can do better, and how we can get more value at the individual, group, and organizational level from the technology we leverage. All of this requires continual and sustained commitment from not just individuals but shared sustained commitment of groups, and over time, the entire organization.

Sustained commitment is not something that is easily achieved or maintained. We know from considerable experience that you need three things before you can get individual or shared commitment.

1. You need the individual to have an interest and awareness of the technology.

2. They need to have an understanding of the technology.
3. You need the individual to value the technology to commit to adopting it.

In a similar pattern, you need shared interest, shared understanding, and a shared sense of value to achieve shared commitment.

Below is an illustrative diagram that we often use at 2toLead when discussing this with clients.

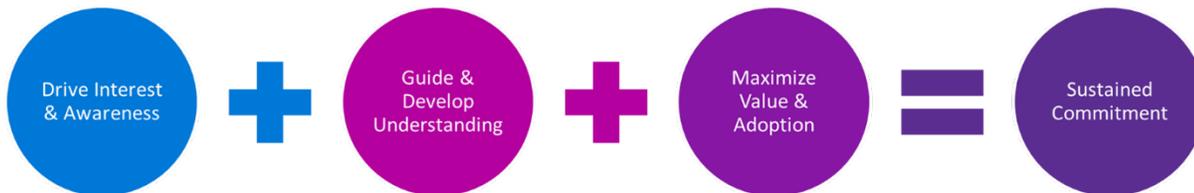


Figure 3 - Formula For Commitment

2.2. Tracking Overall Adoption State

When driving the adoption of Microsoft 365, you are actually driving the adoption of multiple applications and workloads such as SharePoint Online, Yammer, and specific solutions like Intranets and Extranets. The more workloads and solutions in Microsoft 365 that are adopted and used, the more you maximize the value from the platform.

Based on the achievement of key adoption milestones, you can track your adoption across multiple states. This tracking can be visualized in a way similar to the chart presented below:

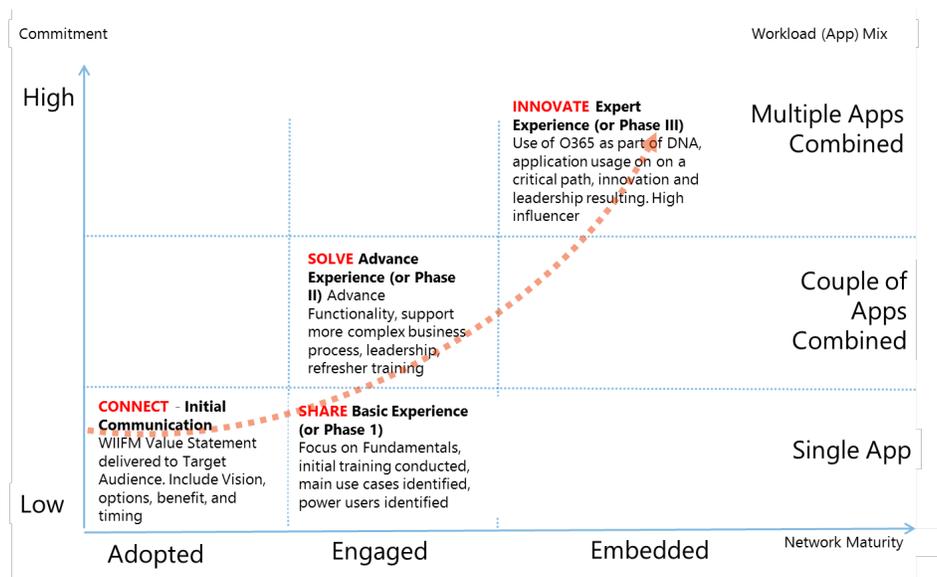


Figure 4 – Simplified image representing tracking adoption across multiple states.

Adopted State

This is the most basic level of adoption for technology, and it is often the target for many IT groups as they roll out Microsoft 365. To achieve this basic state of adoption, it is important to have effective support and planning already in place. The value statements, audiences, vision, benefits, and an overall plan is in place. Microsoft 365 governance and a Microsoft 365 Center of Excellence are often created during this state of adoption.

In most organizations, efforts slow, stall, or further investment aren't made at this stage, resulting in only realizing a small portion of the potential value Microsoft 365 provides.

Engaged State

This is a more advanced state of adoption that includes similar guidance, planning, and resources as the adopted state but focuses more on "ongoing" pro-active adoption efforts. Often this means ongoing adoption campaigns are being executed regularly. This guidance document contains many practical examples of pro-active activities that your organization can execute to achieve an engaged state and work towards an embedded state of Microsoft 365 adoption.

Much of what we will articulate in this guidance and our adoption plan will drive greater engagement to accelerate the rate of Microsoft 365 being embedded into how people work.

Embedded State

Once you have performed a number of adoption campaigns and helped users understand and embrace the new technology, you can shift your focus on enabling new change or supporting your users and champions so that they can achieve more.

In this state, the cultural changes would typically have taken place, and the overall usage of the technology is embedded in the majority of user's everyday work. For some user segments, this could be achieved in less time, depending on how long or how impactful the technology has been in their work life. A great example is how rapidly large user populations can often adopt Microsoft Teams.

One of the important factors to keep in mind is that we must continually challenge the embedded state of technology. At times, even though Microsoft 365 has successfully been adopted and is being leveraged in an embedded way by some users, those users can still improve their usage and get considerable more value by improving the way in which they work

with the technology. This is especially true for Microsoft 365 as new technology services are introduced (such as the recent introduction of Microsoft 365 Planner). Even if a user was a great user of SharePoint tasks, Outlook tasks, and Project Online, they could benefit from the innovation and capabilities introduced within Microsoft 365 Planner.

2.3. Challenges With Enterprise Technology Adoption

While many organizations understand that Technology Adoption is a critical part of an organization's continued success, some challenges exist within organizations that can make it much harder for some organizations versus others. Here are five high-level reasons some organizations adopt new technologies more slowly.

1. Slower Corporate Readiness & Rate For Change
2. Competing Technology Investments
3. New Technology Not A Core Competency Of IT
4. Culture Not Aligned With Usage Patterns & Usage Models
5. Technology Not Mature Or Relevant Enough

Consider your organization. Is there anything you can do to improve on those five common reasons? Each of them can be resolved or improved. Are improvements to these five challenges part of your enterprise technology strategy? For example, if a new technology is not a core competency of IT, have you considered outsourcing the technology management?

Accelerating the change curve...

There is always SOME loss of productivity when implementing new productivity systems that provide new ways for people to work. This is ALWAYS the case. It also makes sense when you think about it at an individual user level, at a group level, or even at an organizational level.

When you introduce new systems, you need time to recap the original level of productivity you had before introducing the change. Then there is a continued productivity gain until the technology's potential has been exhausted or the organization introduces new change. There is plenty of research on this subject; it's often called the change curve. The goal is to **accelerate the change, get to the positive impact and outcomes quicker, and reduce negative consequences** that the change can have.

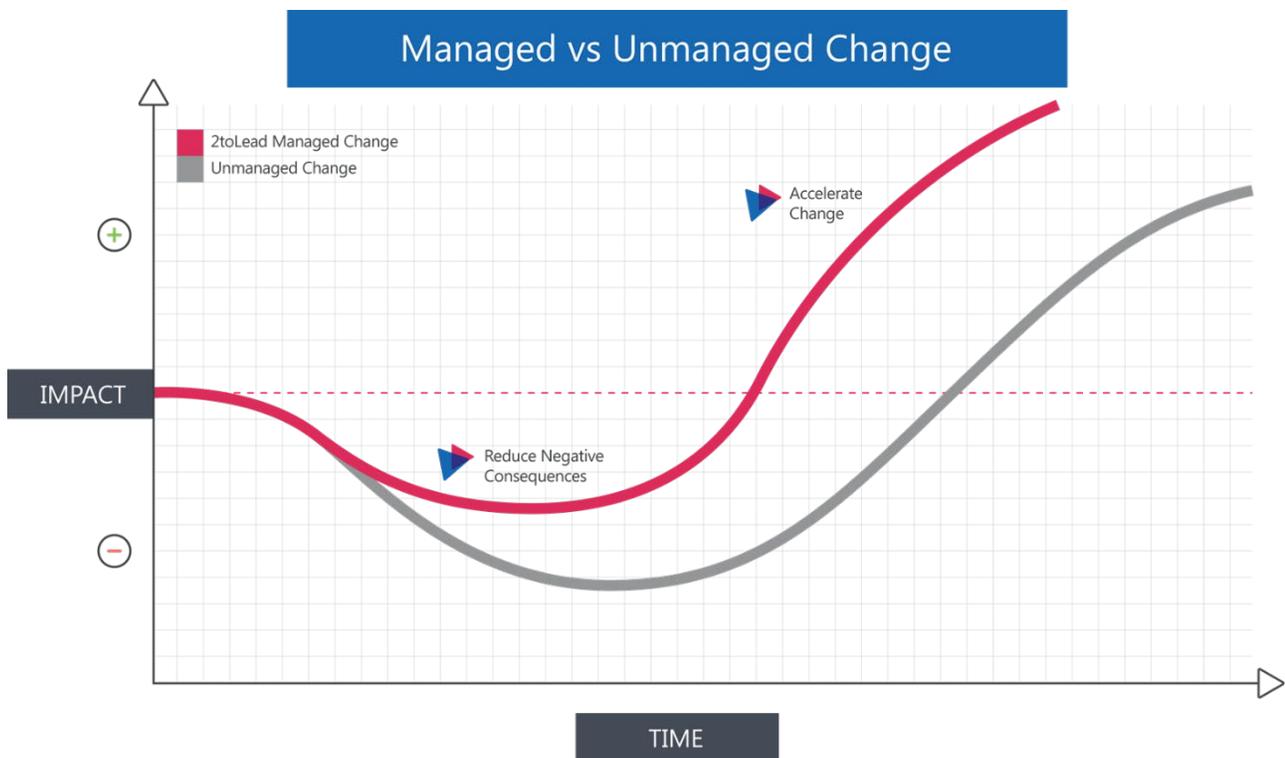


Figure 5 - Graphing managed change and unmanaged change.

On the image above (Figure 5), you can see an example of these two approaches and how managed change can lead to more significant results at an accelerated pace.

It is also imperative not to delay change simply because there is a fear of short-term loss in productivity or inconvenience. If you do, you run the risk of falling behind and running legacy technology, processes and having legacy behaviors that put your organization at a competitive disadvantage.

In other words, don't let the scrambling organization be you. Get ahead of the curve or, at a minimum, keep up with changes in the industry so that you retain the best talent and maximize the potential people bring to your organization.

Change isn't easy. It needs our help.

Change isn't easy, and it doesn't come naturally. We often struggle with change even when there is a good reason for it. In fact, we even struggle with it when change can mean life or death. Let me share a short example from a research study, which can be found in a great book called "Immunity to Change."

Doctors told heart patients that they would absolutely die in 6 months if they don't change their lifestyle, diet, and exercise habits. Those individuals certainly had the motivation and a sense of urgency. They even had the tools and the vision as well as an understanding of the end state. In this situation, only 1 in 7 or 14% could manage to carry out the change on their own. Desire and motivation aren't enough on their own: even when it's literally a matter of life or death, the ability to change remains maddeningly elusive.

Think about that real-world story. If one in seven people with an absolute need to change can't change, what chance do we have for individual users in our organizations to change how they collaborate or communicate on their own? What are the odds of them adopting Microsoft 365 and new ways of working without help? The answer? Very low odds indeed.

The good news is that we can perform activities that provide the incentives and help that your users need to embrace change. In this guidance, we will illustrate many of these activities and initiatives that we can implement to help drive change in our organization and the behavior of our users. The bad news is that change is hard, and it won't happen without effort from leaders like yourself.

So how do we help encourage change?

How we help encourage change is dependent on many factors, such as the kind of change we are driving and situational factors like the environment, the individual, and circumstances surrounding the change. This guidance aims not to provide generalized guidance on driving change (there is already plenty of great material out there on this topic) but to give actionable examples and activities that other organizations have tried that have driven or improved adoption. In other words, "Don't tell me that change management and adoption are important. Tell me *how* we can improve adoption, and provide specific examples."

What are examples of how people need to change?

In today's workforce, it is critical to improving specific behaviors to maximize the value of modern productivity technology (like Microsoft 365). What follows are a few examples of key skills or behaviors that need to change for employees to be more effective with Microsoft 365.

- **Working openly and collaboratively** by understanding the importance of collective or shared benefits. Often this requires an optimistic work attitude and trust to be successful.

- **Working as a networked leader** by strengthening the business results the network can provide, helping the network make better decisions, and creating a more connected/empowered workplace.
- **Working and learning out loud** by sharing or narrating insights, lessons learned, and challenges that are being experienced.
- **Working with a mastery of personal knowledge** and how to manage that knowledge effectively. This is an important behavior where the individual takes responsibility for sense-making and knowledge-sharing. It also means the individual can diversify their network, add value to what can be found, and curate that knowledge for later uses. With the goal of having mastery of personal knowledge, the individual is always developing new skills to enhance sharing and communication.
- **Working in a way where individuals are not just responsible but creative and innovative.** This often means more comfort and interest in 'do it yourself' approaches to challenges. These approaches are where individuals can use creativity, cleverness, and exploration and know it is safe to do so, to solve work challenges.

2.4. Early Adoption Success Questions

What follows are questions based on research from many collaboration and productivity initiatives. These questions are a great way to identify readiness for technology adoption and the likelihood of your success.

1. Has a clear purpose been established?
2. Has the technology been connected to business purposes and business outcomes?
3. Does a culture of trust and sharing exist?
4. Has leadership set the tone and embraced the new technology?
5. Have champions been identified and engaged?
6. Have influencers been identified and engaged?
7. Have key business stakeholders been personally engaged?
8. Has an effective internal marketing campaign and adoption plan been crafted?
9. Does leadership know how you plan to improve adoption?
10. Have clear policies for usage (can/cannot use) been developed and communicated?
11. Has the user experience's usability been tested with workers?
12. Has a strategic approach and clear plan for managing sites, groups, and communities been created?
13. Has the content been seeded to help improve participation and content direction?

14. Has a reward plan been put into place to reward the most significant contributors, collaborators, and sharers?
15. Have you prepared effective channels and opportunities to capture user feedback?

2.5. Pre-Work Recommendations

There are specific activities that can significantly improve your organizational understanding and lead to much more effective adoption planning. Some organizations may be more prepared for an effective rollout of new technology than others. Within this next section, we will share a few of the more critical or overlooked areas of pre-work that you may want to invest additional time or effort into.

- **Workforce & Persona Analysis**

Workforce analysis is a fundamental part of understanding the impact you can drive with your users and within your business. It helps inform how your users work across regions, in business units, or in different roles. We want to dig into collaboration, innovation, communication, device preferences, location, and other areas most impacted by Microsoft 365.

One of the reasons this is considered a pre-work recommendation is that building personas dramatically helps in the adoption planning process and benefits from workforce analysis. Personas help facilitate a shared understanding of your target user base and provide a means to communicate better needs and characteristics that should be considered when planning for adoption.

Lastly, when you combine the personas with scenarios you have identified that should be prioritized, you will be able to plan your adoption activities more effectively and maximize your impact.

- **Current State Analysis**

It is imperative to have a set of baselines of:

- How people work today
- What systems they use
- What challenges currently exist
- Current productivity levels or the time it takes to execute key scenarios that the adoption of Microsoft 365 will impact (optional but recommended)

Keep in mind that one of the activities you will execute is defining your success metrics based on goals and scenarios you map to Microsoft 365 solutions.

- **Rewards & Recognition Plans**

How are employees recognized today? Are there ways in which you already recognize individuals sharing, collaborating, or supporting one another? To effectively leverage a move to empowered modern communication, collaboration, and productivity technology, your organization will need to facilitate a culture change that supports the new ways people can work. We call out the rewards and recognition plans that exist today in organizations as the most impactful (and representative) of the company culture. These can also be a great way to tie adoption to broader company vision and culture enablement.

- **Adoption Roadmaps**

We list many adoption activities in this guidance. Together we will create a practical roadmap to define the order in which they are executed, their dependencies, and the critical path for success. This step helps ensure there is strong coordination, shared understanding, and shared commitment to achieving the targeted adoption goals you set out. If you have created a roadmap before, it will certainly help and can be used as a base to build out your adoption plan for Microsoft 365.

- **Understanding the Capabilities of Microsoft 365**

To effectively drive the adoption of any technology, it is essential first to understand what it is capable of, how others are using it successfully, and when it makes sense to use one capability over another.

If you don't have this expertise, it is highly recommended that you work with an experienced expert who can help educate and guide you as the organization prepares its adoption plan(s).

3.2. What's Required & Recommended?

Before you try and implement a campaign, it is vital for you to review what the recommendations are for being prepared.

- Establish campaign support teams that will lead the weekly action items.
 - Tip Team selection and coordination.
 - This will be the team of people who will communicate tips throughout the campaign. Typically, this is comprised of influencers and leadership throughout the organization.
 - Contest team selection and coordination.
 - This will be the team of people who will be responsible for selecting appropriate contests and coordinating communication, requisitioning prizes, and defining/managing the rules for contests.
 - Training team selection and coordination.
 - This will be the team that will be responsible for selecting the training courses and programs you intend to run within the campaign. They will often run the training or facilitate scheduling and communication support around training.
- Ready-to-go posts, pictures, videos, and content that supports the tips and contests.
 - Remember that once the campaign begins, it may be challenging to keep pace with the response. So ensure you have as much prepared as possible beforehand.
 - It's easier for people to participate and support the campaign (like the tip team) if you provide the core content and give them the freedom to edit it. This also ensures consistency and predictability regarding what content will be covered when.
- Have a reward and recognition plan in place.
 - This is for both the teams that are helping run the campaign as well as the participants in your organization.
- Have a plan outlined of what comes next (after a short breather as these campaigns take quite a bit of effort). You don't want to lose momentum, and there are always more opportunities to drive adoption and usage. In many instances, the adoption roadmap includes outlines of campaigns to show how they strategically build on one another and how assets used in one campaign support future development.

3.3. Tip Team & Daily Tips

Daily or regular tips establish a few things: By being regular, they establish a commitment to sharing and improving awareness and understanding across the organization. Having them be Microsoft 365 themed or related further encourages interest in Microsoft 365 for employees. Tips themselves can improve usage for some staff as they learn new ways to work or share tips with other team members. Be sure to make the sharing of tips as easy as possible. If your Intranet doesn't have a 'share' set of options (email this, post to Yammer, etc.) consider incorporating some to support tip distribution.

Identifying & nominating your tip team...

We have already identified the impact of sharing daily tips, but the way many organizations approach this is to recruit a team of employees from every department (front line to executive) to be on the tip team.

When each day's tip is posted by a different member of the tip team, it increases engagement and creates a greater sense of shared ownership. Having these tips come from different users from various business segments and multiple geographies also get more people involved than just the Microsoft 365 leaders.

Name	Title	Department	Location
Richard Harbridge	Chief Technology Officer (Example)	IT	La Fortuna, Costa Rica
Kanwal Khipple	Chief Executive Officer (Example)	Executive	Toronto, Canada
John Snow	Lord Commander Of The Nights Watch	Field Worker	Winter West

Figure 7 - Example of tip team members being identified.

Be sure to develop a tip team schedule ahead of time to help coordinate and facilitate following up with tip team members during the execution of your campaign.

What should be in a tip?

There are tips and tricks email templates on Success.Office.com in the resources section (<http://success.office.com/en-us/resources>). Additionally, 2toLead has collected many popular tips and tricks based on their work with other customers. These tips will be made available on our website at <http://Office365Resources.com>.

Every tip should contain the following:

1. **Clarity on the target audience for the tip.** Who does this apply to?
2. **An internal explanation as to why we are sharing the tip.** What is the tip's purpose?
3. **A catchy and simple header line for the tip.** This will be used later to reference the tip in weekly summaries or when sharing related tips.
4. **The language that will accompany the tip (description).**

This is the text that would be shared on the tip itself. Feel free to share images or other material here to help or assist the tip team member in the publishing process.

5. **A learn more link MUST be available for every tip.** This should go to your knowledge hub site or some other internal environment where you have additional training or greater details, including a clear visual walk-through. If you do not have one, point to a publicly detailed self-help instruction guide or reference on <http://Support.Office.com>.

Name	Audience	Tip Description
Connecting & Discovering Content With Office Delve		
Quickly Get Back To Documents You've Worked On Recently	Everyone 1	<p><i>This tip is meant to introduce users to their Office Delve profile page and how they can discover content they've been working on within that page.</i></p> <p>Quickly get back to documents you've worked on recently...</p> <p>Within your Delve profile page there is a section that shows the recent documents you have authored or modified in OneDrive or in SharePoint sites.</p> <p>Learn more...</p>
Discover Documents Others Are Working On	Everyone	<p><i>This tip is meant to introduce users to other users Office Delve user pages and how they can discover content other users have been working on within that page.</i></p> <p>Discover what documents others are working on...</p> <p>When you visit someone else's profile page, you see information about them and what documents they're working on. You also see people they're connected to and a selection of popular documents from people you're connected to.</p>

Figure 8 - Tip sample with callouts for key things to include.

Each tip a team member identified can tweak or adjust their tip language if desired. This results in a feeling of ownership for tips they shared even though you are preparing wording for them beforehand.

How are tips connected to training, challenges, and communication?

Typically for any campaign where you intend to do daily tips, each week should have a theme and challenges noted. All users targeted by the campaign are encouraged to share how they took on and overcame a challenge by posting about it in Yammer using the designated hashtag or another method pre-selected for your campaign.

Tip	Timing	Tip Team Lead
Week Theme: Discovering Information		
Quickly Get Back To Documents You've Worked On Recently	Day 11	Richard Harbridge
Find People & Information By Using Search	Day 12	Kanwal Khipple
Viewing And Editing Your Profile In Office Delve	Day 13	John Snow
Group & Share Documents With Delve Boards	Day 14	Rick Grimes
Keep Track Of Favorited Documents	Day 15	Bill Gates
Weekly Challenges (#CollaborationMatters): <ul style="list-style-type: none"> • Create a Delve board on a topic that matters to you by adding a few documents to that board in Delve. • Make it easier for others to connect with you and get to know you by updating your profile to include some past projects, skills, and/or your interests. • Favourite some important documents in Delve so you don't lose track of them. • Assemble a presentation by reusing content you find on Delve. • Try the Office Delve app for Android or iPhone by downloading it here. 		

Figure 9 - Sample week of tips around the theme of "discovering information."

3.4. Communication Planning

It is important to identify what communication will be leveraged for your campaign leading up to it, during it, and after it is over.

It is important not to overwhelm your audience. For each organization, the frequency and channels that they promote adoption campaigns will be different. Not to mention some campaigns with smaller audiences may use email, where larger enterprise-scoped campaigns will use a mixture of Yammer, Center of Excellence/Knowledge Hub posts, and Intranet announcements.

Communication	Method	Timeline	Communicated To
Kick Off "PILOT CAMPAIGN NAME" Use this message to kick off the campaign and clarify the activities planned for the next few weeks.	Email	May 23, 2016	Pilot participants.
Tips & Tricks Posted On Pilot Yammer Group Daily Each tip will be communicated in a post on the Pilot Yammer Group , but an additional "Learn more..." link will bring the user to training within the Office 365 Center of Excellence Site .	Yammer Group	Daily During Campaign <i>See Tips Schedule for breakdown of tips planned per day.</i>	Pilot Yammer Group members.
Communicate Once Per Week With Pilot Group By Email (Summary Of Tips/Tricks, Training & Challenges) To support planning a sample has been included within the Office 365 Starter Adoption Plan.	Email (Performed by Sponsors on a rotating basis.)	During Campaign On Mondays at 11:00 AM EST. <i>See communication schedule for sponsor coordination.</i>	Pilot participants
Training Sign Up Training will be highlighted in the tips and tricks posts with a sign up/registration			

Figure 10 - Sample excerpt from communication planning.

As an example, consider sending out an email each week or sharing a post on your Intranet that contains the context of the week, what tips have been shared during that period, and a link/call to action to sign up for training or perform some specific activities (challenges). Then

use digital signage, e-newsletters, your knowledge hub site, Yammer, and your Intranet to communicate the daily tips and updates on contests throughout the month.

What are some key communication messages?

Before the rollout of any capability, it is important to plan for awareness and communication. Before executing a campaign, you must email key participants, tip team members, and others involved in the campaign's goals, timeline, and expectations.

Because it's easy and ubiquitous, email is the most common channel for communicating to users. It provides a means to answer some core user questions in one place and allows for broad reach. It is not always the best option, though. Be sure to use a multitude of communication channels for optimal results. Always keep messages short, with clear calls to action and links to more information like FAQs or your Knowledge Hub site. Putting too much detail in an email may result in users missing key information.

Also, define a communication plan that outlines how often communications will be sent. It's important to strike a balance between too many messages, which may overwhelm users or too few, losing momentum. As an example, it will be important to make sparing use of company or network-wide announcements on the Intranet, on All Company in Yammer, or by other methods on campaign progress, milestones, or to notify users that deadlines are approaching.

Tips for effective communications:

- Keep your audience in mind by creating content that answers the main questions your end users have, "Why are we doing this?", "What is required of me?", "How does this help me do my job?", "How do I get started?" etc.
- Use simple and consistent designs to make your emails attractive. Balance images and text in your messages and use consistent style and colors throughout your campaign. Standout design makes it easier for users to recognize the important information waiting in their inbox.
- Make two-way communication with your users easy by linking to active discussions or places where they can share feedback in an open manner (Yammer). Having consistent links to areas for feedback, support and training add usefulness to emails.
- Be smart about who sends your emails. Emails about a new technology that will impact a user's daily activities are best received when sent by a person, preferably an executive

sponsor and not a group. It never hurts to rotate sponsors who communicate as well to improve visibility and proximity to others who appreciate or know the sponsor.

At a *minimum*, every new technology roll out should have the following emails and associated resources:

- **Pre-Launch Email**
 - **Announcement:** We are excited to announce that you will soon have access to XYZ. As a company, we have decided to standardize on this.... because it provides...
 - **Requested Action:** Visit our SharePoint site <insert link> for training, FAQs, and additional information on this new and robust technology.
 - **Questions Action:** If you have questions concerning XYZ or preparation for the launch, don't hesitate to contact [name, phone, and email]. We are confident you will appreciate XYZ and encourage you to begin using it as soon as the roll-out is complete.
- **Launch Email**
 - **Announcement:** XYZ is now live! You can immediately begin enjoying....
 - **Requested Action:** Get started today by attending upcoming training: <insert links to training resources and training options for users>
 - **Questions Action:** If you have any technical problems or questions, please feel free to contact our help desk or visit <intranet link>.
- **Post-Launch Email (+30 Days)**
 - **Announcement:** I hope you have had the opportunity to integrate XYZ into your daily activities. If you are using XYZ today, you already know that this exciting new tool can be used for everything from... to ...
 - **Requested Action:** Now that you've been using XYZ for 30 days, we would like to hear from you. Please take a few minutes to complete our XYZ feedback survey <insert link> to share your thoughts and input on how XYZ works for you.

3.5. Branding & Messaging

Since a time-boxed campaign can have a name and is only for a shorter duration, it is easier to brand it. It's important to create a consistent message and brand and leverage it to connect the

adoption activities better and help people understand what it’s about. At the same time, this can create interest and lead people to search or ask about it, which can increase reach.

When creating these branded campaigns, be sure to update Yammer and Microsoft 365 branding to support the campaign. In Yammer, you can create a header and promote the campaign as well as an individual contest by updating the header.

There are a few places you can update with your main brand/theme for the campaign duration.

- **Update Microsoft 365 Theme**
 - Update with a custom logo highlighting your campaign.
 - Update with a custom background highlighting your campaign.
 - Update with custom colors highlighting your campaign.
- Update Yammer Design (<https://www.yammer.com/yourtenant/admin/customize>)
 - Update Yammer coloring.
 - Update Yammer network masthead and logo.
 - Update Yammer logo for Yammer emails.

3.6. Training

Since you are already doing a time-boxed campaign, consider providing targeted training sessions that are hands-on and participatory.

Training	Training Abstract	Timing
Office 365 – 101 (On boarding)	This training will be comprised of 4 modules and will take 1.5 to 2 hours. <ul style="list-style-type: none"> • Module 1: Working with SharePoint/OneDrive for Business • Module 2: Delve, Search & Your Profile • Module 3: Working Out Loud in Yammer • Module 4: Improving Communication with Skype for Business & Outlook 2016 	May 26 (Thursday of Week 1)
Office 365 - 101 (On boarding) (Repeat)	This training will be comprised of 4 modules and will take 1.5 to 2 hours. <ul style="list-style-type: none"> • Module 1: Working with SharePoint/OneDrive for Business • Module 2: Delve, Search & Your 	May 31 (Tuesday of Week 2)

Figure 11 - Sample excerpt from training planning.

If you are looking for ideas for training that compliment your campaign, consider providing the basics of SharePoint, Yammer, Microsoft Teams, Outlook, or another Microsoft 365 technology.

Providing more advanced training for targeted groups or more mature audiences throughout the organization can also be done further into the campaign. Doing this after the basic training will allow some users to mature their understanding and advance their training as the campaign executes, while others may be interested in reviewing the training after the campaign is completed when they later hear about it. So be sure to make all training recorded and available for viewing on your Microsoft 365 Video Portal.

It is important for training to be hands-on when possible. Even if you are performing training remotely, you can create exercises if the group is small enough. With large groups, you can still create exercises within training and could encourage others to participate in an exercise by highlighting those who complete the exercise first.

As an example, consider how much more impactful training might be around OneNote if all participants open a shared OneNote and fill out specific sections so that they can experience co-authoring or how OneNote indexes images.

3.7. Contests, Challenges & Ideas

Running weekly contests or challenges can help reinforce the tips and can get users to try a new way of doing things. In a typical example, an organization will hold 4-5 contests in total over 30 days. Each contest can have participants win a small prize, and one employee who participated would randomly win a grand prize each time a contest is run. The goal of each contest is to get the users to take action (upload a profile picture, download a mobile app, etc.), and those actions should be connected to a tip or tips that had been shared (explaining how to do the action and its value).

Additionally, using challenges (the action they need to take) and connecting them to tips, tricks, and training the user receives can greatly improve participation rates, retain what was shared, and improve engagement rates for future communication and training.

What are some examples of Microsoft 365 contests?

We have provided some useful contests in a resource document on our website at <http://Office365Resources.com>, along with the business outcome they are targeting/aligned to.

Contest	D	S	S	Y	O	Measuring Outcome(s)
Office 365 or Intranet Scavenger Hunt Help familiarize and introduce employees to capabilities in Office 365 or your Intranet with a scavenger hunt.	●	●	●	●	●	Tracking for this will depend on what scavenger hunt activities are included. Some organizations encourage the use of hashtags to help count and track.

What are some examples of Microsoft 365 challenges?

We have provided some useful challenges in a resource document on our website at <http://Office365Resources.com>, along with the business outcome they are targeting/aligned to.

Challenge	D	S	S	Y	O	Desired Outcome(s)
Use Delve to find documents from a recent meeting you attended.	●					Improved Meetings
Create a OneNote document on your OneDrive or in a SharePoint team site. Associate it with a recurring meeting that you have.		●	●	●		Improved Meetings
Provide and coordinate on action items from a meeting with a task list.			●			Improved Meetings
Use a poll to find out what your audience is interested in before		●				Improved Meetings

What are some examples of Contest rewards and prizes?

Not all contests need to have expensive prizes. It's also almost always better to have multiple winners and multiple prizes or goals for contests. Before the contest, you should survey the participants on what they consider a good prize. Prizes are not effective if they have no perceived value to the contestants. Consider the list below if you are looking for ideas on what you might offer as a prize for an upcoming contest.

- **Technology and devices.** Probably the most common kind of larger prize. By offering an iPad for the winner or a device, you can also pre-load training and other materials onto the device and highlight in the 'about the prize' section how devices work with Microsoft 365. Another alternative is to offer a popular gaming console like a PlayStation or Xbox console as a prize.
- **Gift cards.** Restaurant, grocery, entertainment gifts, and all-purpose credit cards are perceived as values outside the compensation structure. Winners can accumulate them and transfer their values. When combined with a simple printed certificate or with a plaque, they double their impact.
- **A day of telecommuting, or a half or full day off of work.** While this is a big prize, it may only be possible with a smaller group focused within a specific department where the managers agree to this prize. Be careful with prizes like this as these individuals are often lead performers – as a result, and this is not a popular prize.
- **Badge for their user profile, plaque, crystal, or trophy.** Sometimes a prize doesn't have to have financial value but instead can be something a user is proud of or feels a sense of accomplishment by obtaining. Giving specific users badges based on prize wins (especially those where judges select) can be a significant bragging right internally and could help that employee continue to advance their career. You can even give the employee a plaque, crystal, or trophy that is serious or fun to help highlight the accomplishment.
- **Special spotlight on the homepage (typically related to the contest).** One of your goals is to drive awareness. Upon completion of a contest, you should be sharing the impact and results loudly and broadly, but why not make an employee spotlight or special feature about the employee one of the prizes? Another way of doing this is by creating a wall of fame (physical or digital) for those who have hit certain achievements or won a major contest.
- **Lunch with a Leader.** Offering a paid lunch with an executive or leader can be a low-cost incentive that still encourages many to participate. Plus, it creates nice photo opportunities and engagement when the employee wins.
- **Vacation cruises or exotic vacations.** This is a costly prize option, but if you make it a major prize for multiple contests, it could be something to consider. Another approach one firm took was to offer a group vacation to an exotic place to the group who
- **Outside the Box.** These can provide new and spectacular prizes that will help contestants beyond the current trial. Consider the impact of a rental car for a week or month, a limo pick-up at home for a week or a month, a minor home renovation, or new furniture.

Communicating prize milestones, winners & contest information

Don't forget to promote the contest winners! Don't miss the opportunity to inform employees of early winners and outstanding achievements among participants. This will also remind other employees of the ongoing competition, allow them to congratulate the winners, and help encourage those who haven't yet participated. Additionally, share milestones reached by individuals and departments and how close they are to reaching the grand prize.

Remember, don't inundate your employees with too much contest communication, but don't let them forget about it either. A great place to promote the winners is in a designated section of your social intranet home page. Consider announcing the winners for the day or week in the same location at the same time on a specified day, so everyone will know when to expect it.

What are some examples of Microsoft 365 activities/ideas that also improve a campaign's effectiveness?

Be sure to consider and plan for additional activities that aren't quite contests or challenges but that will impact the campaign's success.

What follows are a few detailed examples.

Incorporating Parties, Open Houses, Expos, Fairs, Or Lunch & Learns

One great way to improve the effectiveness of a campaign, especially if it's in support of a launch of new technology or way of working, is to host a user adoption engagement event.

These events are often informal Microsoft 365 learning sessions in the same space every day for several days. They involve sharing key messages, best practices and encourage users to sign on and interact with Microsoft 365 during sessions and expert discussions. It can allow users to gain greater exposure to Microsoft 365 by reaching more employees in the spaces they will congregate (e.g. lunch areas) and will enable them to take Microsoft 365 for a test drive if they haven't already.

Be sure to plan these events carefully. As an example, here are a few common things to consider:

- **Determine The Event Location**

Don't forget to contact facilities to ensure the room(s) are set up and scheduled. Consider rolling duplicate events at other locations to be more inclusive or virtual supportive events.

- **Determine The Event Date & Duration**

Is this a single-day event or a multi-day event? Can people attend part of it, or should they attend all of it?
- **Confirm Room Equipment Needs**

Be sure to contact site support for equipment setup. Not just tables and other common items, but extension cords, computers, iPads, monitors, projectors, linens, art easel(s), decorations, and more.

 - Another thing often missed is the need for posters and table toppers (including posters/signs to help people navigate to the event location).
- **Coordinate Food & Beverage Needs**

Be sure to have food, drink, and (if possible) candy available.
- **Provide Evaluation Turn In Boxes/Options**

Depending on what you are doing at your event, be sure to include things that encourage people to provide feedback and effectively collect the feedback.
- **Determine The Number of Staff Needed**

Don't forget to determine the number of organizers, volunteers, and support staff needed. If training is needed - be sure to have planned for that as well.

 - Don't forget a photographer for a photo booth if you have one.
- **Don't Forget To Promote The Event**

Don't forget to name your event, send out event invites, announce the event on Yammer, the Intranet, and in organizational meetings, and if possible, share posters or other material.
- **Print Out Guides, Punch/Bingo Cards, Scenarios & More**

Getting started guides can be extremely helpful when running many of these events, as can a punch or bingo card that encourages exploration, meeting staff, or visiting booths.
- **Plan Your Prizes & SWAG**

Not sure what to share/use? Consider tumblers, lunch bags, phone stands, pens, notebooks, stickers, gift cards, grand prizes, t-shirts, and work with sponsors if you need some extra funding and it's appropriate for your event.

 - You can buy a ton of Microsoft branded merchandise at this website:
<https://www.co-store.com/iw>
- **Plan Your Content, Speakers & Activities**

This may seem like the most obvious one. Still, when running an event, you may want to have key activities like a keynote, drop-in sessions, scheduled sessions, demonstrations,

ask the experts, and expo style booths that are coordinated around key content/areas of interest.

Incorporating Photo Booths

Setting up a "Profile Photo Day" can be extremely helpful when driving Delve profile usage or Yammer profile usage. Organize a headshot photo shoot in a public place such as the cafeteria (you can even use Yammer or Microsoft 365 to find a volunteer photographer within your organization!). Encourage employees to be themselves and show some personality. This helps ensure most staff have a profile photo that encourages greater connection amongst staff, both on and off Microsoft 365.

Suppose you are doing a specialized campaign such as improving employee praise and recognition. In that case, you could set simple recognition "photo booths" at large Office locations and encourage employees to come to get a photo with another employee that they want to recognize during a recognition themed campaign.

Incorporating Video Recording

Video interviews, recordings, and submissions can all greatly improve the level of engagement around a campaign. While this could be a contest, often recorded video assets can be used to amplify or extend the reach of key activities in a campaign.

Here are two simple examples:

- Record the key campaign messaging from an executive sponsor or stakeholder. Get interviews from other stakeholders and ask why the campaign theme is important to them.
- Record a video interview with a co-worker. Include what they enjoy most about being an employee and what they're currently working on. Alternatively, invite employees to post their video and vote on the best one (maybe not a contest, but just a related activity you are encouraging). This can foster business collaboration, operational awareness, and community cohesion. It can also build greater awareness of Microsoft 365 functionality.

Incorporating Physical Assets

You can use a "Streaming it out loud" approach which displays a feed of Yammer messages on a TV or computer screen. This is particularly useful during large internal events so that staff can post about the event as it takes place. Place your display in a shared space so that everyone can engage with the network. This publicizes the network to employees, reminds them to

participate in the network, and highlights how many other people are actively using the network.

Watch this video to learn how to use Streaming it Out Loud: <https://streamingitoutloud.com>

For a campaign oriented around something like recognizing one another, to be inclusive, it will be important to enable those who don't have as much access to technology to participate as well. In some local scenarios, they may want to have a physical praise or recognition board which they can take a picture of and post with an appropriate hashtag to praise multiple people in this way on Yammer or Microsoft 365.

Incorporate Food & SWAG

Hand out Office365-branded or Company-branded swag as prizes or as delicious treats to bring employees together to talk about Microsoft 365 in the break room. This can build excitement and energy around the launch and can be used to reward people for participation. Throwing a cookie party for teams who participated in a specific campaign is another example of using treats.

You can buy a ton of Microsoft branded merchandise at this website: <https://www.co-store.com/iw>

Incorporate Support Staff & Volunteers

For a campaign oriented around something like recognizing one another, it can be really helpful to have a resource focused on going through these posts and adding mentions, applying topics/hashtags, and generally helping this effort be more successful, since many people may not be able to post praise to Yammer effectively (praise a colleague by only first name, fail to execute an at-mention, and not hashtag a post)

Another example for volunteer staff is for individuals to have simple photo editing programs available to rotate images or help people update their profile images. Sometimes these volunteers can even take a posted message and re-post them in a corrected format for distressed users and incapable of fixing the problem themselves.

3.8. Targeting Personas & Groups Of Users

When you are executing the campaign, it can be valuable not just to provide training but user stories that are focused on why Microsoft 365 is valuable for this role or that persona.

Identifying & Developing Personas

A persona, simply defined, is a fictitious character that represents user types. Personas are the “who” in the organization. You use them to create familiar faces and inspire leaders to know their users better, and build empathy and clarity around the user base.

Using personas helps characterize sets of users. It’s a way to capture and share details about what a typical day looks like and what sorts of pains, needs, and desired outcomes the personas have as they do their work.

You need to know how work currently gets done to provide relevant changes with technology, plan for readiness, and drive adoption through specific behavior changes.

In practice, you would segment the user population and then assign personas to the different user segments. For example, let’s say there are 18,000 employees. Let’s say that 3,000 of them are business managers, let’s say that 6,000 are salespeople, and let’s say that 1,000 are product engineers. You could create a persona named Mary to represent the business managers, a persona named Sally to represent the sales people, and a persona named Bob to represent the product development engineers.

This sounds simple, but it’s powerful. If you do a good job of workforce analysis, you can better determine how many users a particular scenario is relevant for. Now you have some numbers to work with. This can help you quantify business impact. This can also help you prioritize. If a particular scenario is relevant for ten people, but another is relevant for 1,000, you can evaluate actual numbers.

Let’s take Bob, for example. As a product engineer, Bob designs and develops new product concepts. He would love to collaborate better with his distributed team, and he would love better feedback loops and interaction with real customers.

We can drill in a little bit to get a better picture of his work as a product engineer.

Here are a few ways you can drill in:

- **A Day in the Life** – We can shadow Bob for a day and get a feel for the nature of his work. We can create a timeline for the day and characterize the types of activities that Bob performs.

- **Knowledge and Skills** - We can identify the knowledge Bob needs and the types of skills he needs to perform his job well. We can use this as input to design more effective readiness plans.
- **Enabling Technologies** – Based on the scenario you are focused on, you can evaluate the types of technologies that Bob needs. For example, you can identify what technologies Bob would need to connect and interact better with his team members.

Another approach is to focus on the roles, responsibilities, challenges, work style, needs, and wants. This helps you understand which solutions are appropriate, what sort of behavior changes would be involved, and how much readiness would be required for any significant change.

It always comes down to building empathy, understanding, and clarity around pains, needs, and desired outcomes.

Identifying Value Opportunities/Needs Alignment with Microsoft 365 For Personae

Take Microsoft 365 capabilities and map them to the identified role or personae needs.

Consider creating clear guides for Personas.

- Jill struggles to find time for X.
- Jill can't get an answer quickly for Y, so she makes a Post to Yammer, or she searches in Delve.
- Consider creating a day in the life of... for each persona, which tells the story of how they might use Microsoft 365 daily.

New X User

One collection of users that should have a clear story are those that are new to technology. Consider creating a compelling 3-5 slides story/value add for those who are new to Microsoft 365 technology. At the same time, add a set of clear action items (checklist) for them to use.

What follows are examples of the kinds of new experience stories your organization could develop:

- New Yammer Users
- New SharePoint Users

- New Microsoft Office Users

3.9. Incorporate Other Initiatives

Many organizations have other initiatives going on that have a great impact on the company culture or innovation. These initiatives should be embraced and integrated into campaign efforts around adoption.

Here are a few examples:

- Many companies have a yearly 'give back' or giving exercise that encourages community, charity, or volunteer activities. Consider creating a hashtag to identify efforts around this, a custom banner for this in Microsoft 365 and Yammer, and encourage people to post updates on their efforts in a designated group.
 - For example, you can use Yammer to recruit volunteers, organize the event, apply a related hashtag, and frequently update with progress towards goals so that everyone is informed. This can promote a sense of volunteerism across the organization and also demonstrates the wider uses of Yammer.
- If you have corporate values that are a key part of your company's culture, consider integrating those into how Yammer content is communicated, especially at a leadership level.
 - As an example at 2toLead, our core business philosophy is being generous. As a result, we encourage and have created a culture of adding the hashtag #BeingGenerous when calling out great work a colleague, customer, or peer provides when exceeding expectations, or we use it to highlight community contributions and extra effort people are putting forth.

3.10. Measure The Impact

Measuring the impact is critical. Identify which activities you can quantify and determine how you will quantify the impact those activities drive.

As an example are you seeing:

- The number of engaged users increasing during the campaign?
- The number of engaged users lower than before the campaign and higher 30-60 days after the campaign?
- How many users were engaged in the campaign (actively participating) during it?

- Is there an increase in the number of users who have filled out additional profile properties or added a profile picture?

 **NOTE:** If you are looking for more guidance on the metrics available in Microsoft 365, or how to measure business impact be sure to look at our "[Measuring Business Impact With Microsoft 365](#)" Whitepaper.

4. ADDITIONAL ADOPTION ACTIVITIES

For us to realize the value we want, we have to get our users to adopt the new technology and change the way they work. We are sharing additional successful adoption activities in this section. These activities were discovered based on experience, extensive research, assessments, and work done with Microsoft and analyst agencies.

These activities are based on real-world successes (though they vary in impact). The activities may help your organization be more successful in driving the adoption of Microsoft 365 and related technology like SharePoint Online, Lync Online, and Exchange Online. The activities also translate to on-premises server technology like SharePoint 2013, SharePoint 2016, and more.

 **NOTE:** Remember that activities are best done in a strategic and aligned way – so they should be incorporated into adoption campaigns and your detailed adoption plan.

4.1. Phases of Microsoft 365 Workload Rollout

It's also important to understand the phases that are a part of any new technology rollout. Within each activity description, we have identified the phase in which it is typically executed. These are just recommendations. In many cases, you may repeat an activity or adjust its timing based on your circumstances.

- **Pre-Launch:** The pre-launch phase is where you identify what is needed for a successful launch and create your plan. During the pre-launch phase, you prepare for the launch and ensure that effective testing, pilot, or feedback opportunities exist.
- **Launch:** This is the actual launch initiative. During this phase, it is important to capitalize on pre-launch work and take full advantage of the launch itself to kick-start and begin driving adoption.
- **Post-Launch & Ongoing:** This is without a doubt the most commonly neglected phase. It is critical to invest time and energy after the launch of Microsoft 365 to ensure it meets user needs, helping users, and effectively adopting the technology. So much energy is put into getting to the launch that it's easy to forget the work that comes after it. Be sure to carefully plan and execute post-launch and ongoing adoption activities for as long as the technology is being used. Even if you have good adoption rates, these activities can be important in helping to maintain adoption.

As you read through the activities that follow:

- Consider the relevant activities for your leadership group.
- Consider the activities that drive awareness and usage.
- Ensure that you have a plan for how to effectively help users understand the value that the new technology provides.

Each activity has been listed in the category that maps closely to one of those primary purposes.

4.2. Leadership Activities: Making Microsoft 365

Successful

Before we explore creative or interesting ways to drive adoption, we must start with fundamental steps and activities that should always be accomplished first. What follows are examples of highly recommended activities for every organization to complete before investing in additional adoption activities.

Identify Key Stakeholders	
Suggested Timing: Pre-Launch	Level of Effort: Low
<p>The most successful Microsoft 365 rollouts occur when a committed team of individuals, representing a cross-section of the organization, execute all tasks effectively and on time. You need to identify stakeholders and ensure that they have clear expectations of their time commitment, qualifications, and responsibilities.</p> <p>Examples of key stakeholders:</p> <ul style="list-style-type: none"> • Business owners • Champions • Communication leads • Community managers • Department leads • Executive sponsors • HR managers • IT specialists • Project managers • Training leads 	

Engage Executive Sponsors

Suggested Timing: Pre-Launch	Level of Effort: Low
<p>It's essential to obtain the buy-in and support of leadership before introducing Microsoft 365.</p> <p>During the preliminary phase, executive sponsors should:</p> <ul style="list-style-type: none"> • Help the project team(s) craft the overarching vision for Microsoft 365 by tying it to broader organizational objectives. • Play a role in communicating the vision to other leaders across the organization as well as employees within your organization. • Actively and visibly participate and use Microsoft 365 capabilities to reinforce desired behaviors and help drive adoption by end-users. 	

Create A Well-Defined Vision for Microsoft 365	
Suggested Timing: Pre-Launch	Level of Effort: Low
<p>A well-defined vision enables employees of all levels to foresee the value the new tools will bring, not only to the organization as a whole but also to the individual roles within it. This, in turn, helps secure buy-in and support across the business.</p> <p>Here are two simple examples of a vision statement:</p> <p><i>To transform the way people within our organization connect with each other so that when we work together on documents, tasks, or projects, we can improve collaboration and tracking and reduce redundancy and extra steps in relevant processes.</i></p> <p><i>To transform the way our department:</i></p> <ul style="list-style-type: none"> • <i>Connects with each other,</i> • <i>Works together on tasks or projects,</i> • <i>Communicates with leadership, and</i> • <i>Streamlines processes for efficiency and clarity.</i> 	

Determine Actionable Goals & Map to Solutions in Microsoft 365	
Suggested Timing: Pre-Launch & Ongoing	Level of Effort: Medium to High

You'll want to understand the common business challenges experienced across departments and teams, which in turn will help you identify practical solutions.

Host a meeting with your key department stakeholders, project managers, and business champions to define the business processes that will help them meet their broader business goals and prioritize the Microsoft 365 solutions that will help them achieve those goals.

Define Your Metrics for Success

Suggested Timing: Pre-Launch & Ongoing **Level of Effort:** Medium to High

When you develop your ideal scenarios and solutions, it's critical to develop 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.

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.

Create Your Communication Plan

Suggested Timing: Pre-Launch & Ongoing **Level of Effort:** Low

Communication is vital throughout the process of launching new workloads or Microsoft 365. Plan major milestones and critical communications so that all stakeholders understand the communication plan.

Train Your Helpdesk

Suggested Timing: Pre-Launch & Ongoing **Level of Effort:** Low to Medium

As you begin launch planning, a fundamental necessity is ensuring that your helpdesk is ready to support basic Microsoft 365 scenarios and that you are prepared to manage the provisioning of licenses, rights, and other key essentials.

4.3. Awareness Activities: Helping People Use Microsoft 365

These activities are designed to get people to adopt Microsoft 365 and help them start using the technology. Because end-user education is critical to success, this section provides some training and education-based activities. Included with each activity is a short description of the activity and how to implement it, including some real-world examples of how it works in practice. *Keep in mind that the goal is to drive adoption and not just usage (adoption goes beyond usage).*

Leverage Champions	
Suggested Timing: Pre-Launch & Ongoing	Level of Effort: Low
<p>Pre-Launch: Identify “champions” — the top active contributors and users of the new technology. The best champions are optimistic, like to share, and are very responsive to their peers. Support, train, and engaged these individuals to effectively influence organizational readiness, adoption, and experience with the new technology.</p> <p>Ongoing: Keep in mind that you have access to all sorts of usage and signal data in Microsoft 365 that can help you determine who active users are and which users have considerable influence and impact. These individuals often require or can benefit from additional support, guidance, training, or engagement from your team.</p>	

Create Countdown Email Campaigns	
Suggested Timing: Pre-Launch	Level of Effort: Low
<p>Send a “Countdown Email” to let your audience know what’s coming, set expectations, and spark interest by focusing on the “What’s in it for me?”</p>	

Broadcast Portal Announcements	
Suggested Timing: Pre-Launch & Ongoing	Level of Effort: Low

Work with Internal Communication to make announcements across your company portal and IT portal as needed.

Post Internal Advertisements

Suggested Timing: Pre-Launch **Level of Effort:** Low

Ensure that Microsoft 365 has a visual presence throughout your corporate offices with posters, flyers, educational booklets, and other print messaging.

Portal ads, posters, and more advertising assets like t-shirts can be found at the Microsoft Office store: <http://www.co-store.com/iw>.

Show Teaser Videos

Suggested Timing: Pre-Launch **Level of Effort:** Low to Medium

Play teaser videos during pre-launch events, perhaps by the elevators or by the cafeteria. It's a great way to generate buzz and excitement. Ellen van Aken has an amazing collection of intranet launch videos you can use for inspiration here:

<http://www.scoop.it/t/intranet-launch-videos-and-teasers>

Stage an Awareness Event

Suggested Timing: Pre-Launch **Level of Effort:** Low

Host an in-person event where users can discover Microsoft 365, talk to a project team member at various scenario stations, and access training resources. Have the event in a high-traffic area such as a lobby or lunch room.

Send Announcement Emails

Suggested Timing: Launch **Level of Effort:** Low

Send out an "Announcement Email" to let users know what's available, how to get started, and where to go to find help and resources.

Host a Launch Event

Suggested Timing: Launch

Level of Effort: Low to High

Host a large-scale launch event, such as a company all-hands or town-hall-style meeting. The executive sponsor and rollout team can officially introduce Microsoft 365 and discuss the value proposition.

Conduct a Baseline Survey & Follow-Up

Suggested Timing: Launch

Level of Effort: Medium

This activity is complementary to announcement emails.

Circulate a baseline survey shortly before users receive activated accounts and devices, to gather data about their knowledge of Microsoft 365. Based on the responses to this survey, provide targeted follow-up recommendations and next steps. Highlighting resources they can access, such as the training site, upcoming webinars, and events, and useful "getting started" resources.

Send Weekly or Biweekly Tips & Tricks Emails

Suggested Timing: Post-Launch & Ongoing

Level of Effort: Low

Periodically share tips with end-users by using "tips & tricks" emails to sustain momentum and broaden the use of each applicable Microsoft 365 scenario.

These don't have to be limited to emails either. If you are implementing a portal, why not put the tips and tricks on the portal? Or on Yammer? That way, the tips are reusable and searchable.

Include a FAQ Listing & FAQ Finder	
Suggested Timing: Pre-Launch & Ongoing	Level of Effort: Medium
<p>Often it can be daunting and troublesome learning a new system, process, or technology. By adding a simple and easy-to-read Frequently Asked Questions (FAQ) section to your portal, you can remove some of the confusion and help reduce the amount of simple reactive question support you provide (to focus this energy on more proactive and useful tasks).</p> <p>What's more, if you implement content types and consistently enable or encourage the creation of FAQs across various systems, processes, policies, and teams in your organization, you can create FAQ collections or FAQ finders.</p> <p>As a minimum, create and maintain a FAQ list to address the most anticipated questions. Post the FAQ on your internal site or Yammer group, and assign a team to update it regularly.</p> <p>Many organizations leverage SharePoint lists to enhance or provide improved FAQs. Leveraging a SharePoint list enables you to track the last modified date of each FAQ (question and answer). You can also see who last modified that question/answer, categorize them, and provide more advanced visualizations of the FAQs on targeted sites by rolling up subsets of the FAQs.</p>	

Schedule Buzz Days (Continual Awareness Events)	
Suggested Timing: Post-Launch & Ongoing	Level of Effort: Low to Medium
<p>Periodically host in-person events (biweekly or monthly Buzz Days) where users can browse Microsoft 365, talk to a project team member at various scenario stations and access training resources. Have the event in a high-traffic area such as a lobby or lunch room.</p>	

Conduct User Experience Surveys	
Suggested Timing: Post-Launch & Ongoing	Level of Effort: Low
Content for this section is not explicitly provided in the image	

You can 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, conduct a final launch survey to assess user satisfaction. You can release this survey 90 days after launch, and then in quarterly or twice-a-year intervals, continue to measure user adoption from a satisfaction and productivity standpoint.

Showcase Spotlight Days

Suggested Timing: Post-Launch & Ongoing **Level of Effort:** Low to Medium

Capture success stories and showcase them through "Spotlight Days," where an employee or team is recognized for their successful use of Microsoft 365.

Report on Success Metrics

Suggested Timing: Post-Launch & Ongoing **Level of Effort:** Low to Medium

After launch, it is surprising how many organizations don't do a good job of reporting on improvements, changes, and progress toward achievement of the initially identified success metrics.

Track results based on your previously defined success metrics and measure progress against your benchmark. Periodically report results to key stakeholders.

Create a Feedback & Improvement Yammer Group

Suggested Timing: Launch & Ongoing **Level of Effort:** Low

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

Incorporate Daily Performance Metrics into Your Portal

Suggested Timing: Post-Launch & Ongoing

Level of Effort: Low

Providing daily performance measures — especially for retail, sales, or help desks — can be a great way to get people to access the intranet regularly. This performance information tells your users exactly how they are doing against personal or organizational performance goals and will drive those users to the intranet or portal.

Incorporate Engaging Content into Your Portal

Suggested Timing: Post-Launch & Ongoing

Level of Effort: Low

Believe it or not, sometimes the most important thing is getting people to regularly visit a SharePoint site or spend time in the Microsoft 365 experience to become more familiar with it.

Finding frequently used (daily) content can help make leveraging Microsoft 365, or certain components of Microsoft 365, more common and habitual, and ease people into using it regularly.

Here are some examples of incorporating engaging content into your portal:

1. **Cafeteria & Lunch Menus:** One of the most popular items in a portal or intranet on Microsoft 365 is the cafeteria menus or menus from favorite lunch destinations. In one organization, they even provided a “delivery to your desk” service through their portal where staff could order food from the cafeteria to be delivered to their desk.
2. **People on the Move:** You can provide another reason for people going to the intranet by posting announcements of promotions, new hires, and people who have found a new role in the organization.
3. **Employee Milestones:** Anniversaries and years of employment are something every organization should have in their recognition and reward programs. Integrate or showcase those in your Microsoft 365 intranet.
4. **Personal Milestones:** To make the portal or Yammer more engaging and personal, you can encourage employees to share significant personal events and milestones, such as the birth of a child, an engagement, or marriage.
5. **Inspiring Quotes:** To make the portal feel more engaging, you can cycle famous quotes. Keep content fresh and inspiring. This can add to motivation

and provide one more reason for employees to visit the intranet portal.

Some organizations incorporate a similar activity to add a humor element by sharing a common “filler word” each week. These filler words or phrases are commonly used expressions in the organization, and they can be featured in a short sentence or story. This can be a way of sharing a company inside joke or acknowledging or playfully poking fun at an aspect of your company culture.

- 6. **Weather, World Clocks, and Stock Tickers:** This one pops up often as a requested item on portals to help share at-a-glance views of certain information. While this won’t change behavior, it can be one more reason for navigating to a Microsoft 365 portal environment.

One of the common difficulties users have when interacting with a global company is determining what time it is in other offices. Consider incorporating a third-party component or free technology to create world clocks on your portal. Rather than searching Lync contact cards or asking which time zone Office XYZ is in, employees will have one more reason to visit the intranet.

- 7. **Event Photo Sharing:** After a significant organizational event, it can be useful to share photos of the event. This can lead to people (typically those who attended the event or who know other employees who attended) reviewing and interacting with the photo content. You may want to create tagged repositories of photos, depending on your internal policies and culture.
- 8. **Employee Discounts & Offers:** Many organizations have discounts through their relationships with various vendors and institutions. Highlighting and sharing these in an accessible way on the intranet portal can bolster adoption.

Create Mock Profiles

Suggested Timing: Post-Launch & Ongoing

Level of Effort: Low

This unusual activity worked for a company that wanted to incorporate humor and personality into its launch activities and Microsoft 365 portal. In this organization, they

created a mock profile of a celebrity user and uploaded documents and pictures to add to the profile. The profile served to create humor, comment on things throughout the organization, and drive users to understand how much an individual can do in Microsoft 365. You could try simple models of this with a fictional character profile that represents a product, your portal brand, or a seasonal event — for example, a Santa Claus “profile.”

Create Real Organizational Profiles

Suggested Timing: Pre-Launch, Post-Launch & Ongoing **Level of Effort:** Low

While mock profiles are interesting for getting people engaged, there is often a very real need for authoritative profiles representing key business interests.

In most organizations, the content uploaded by a head of a department or group may be fantastic. But if that person changes roles or their focus shifts, the content they originally maintained, updated, commented on, or contributed to may also change.

For continuity and to show clear authority, some organizations have created user profiles that represent key offices or personas. Examples include “The Office Of Contoso” or “Contoso HR,” — which might share key announcements, official documents, or official answers/responses to posts on Yammer. You can use these profiles to curate, publish, engage or share information officially.

These real organizational profiles can help drive adoption by providing additional ways for a user to engage the organizational entities directly. The profiles also provide frequent updates to content and can provide new ways for offices, departments, or teams to engage users.

Incorporate Profile Links in Employee Signatures

Suggested Timing: Post-Launch & Ongoing **Level of Effort:** Low

Suppose key people add their internal profile link to their Delve profile or Yammer profile or incorporate a link to an intranet site they manage into their email signature

(when emailing internal people). In that case, this can help encourage people to visit and view each other’s profiles or shared content.

Hold Contests & Competitions

Suggested Timing: Launch, Post-Launch & Ongoing **Level of Effort:** Low

Planned contests can help to drive interest and awareness. Scavenger hunts, trivia contests, and even competitions can be a good way of engaging people. But they often don’t drive sustained adoption, so it’s important to keep these as awareness activities.

One organization ran a SharePoint Olympics event, and another ran a Productivity Olympics competition that included multiple events and leaderboards over a period of weeks.

Run “For Charity” Reward Campaigns

Suggested Timing: Pre-Launch, Launch, Post-Launch & Ongoing **Level of Effort:** Low

Consider rewarding an activity that you want people to do on the portal by contributing to a charity.

Example: One organization ran a competition during their United Way campaign to encourage users to update their profiles in SharePoint. The department with the highest rate of user profile updates earned bragging rights and the ability to select a targeted charity that would get a \$1,000 donation.

Define Portal & Site Identities

Suggested Timing: Post-Launch & Ongoing **Level of Effort:** Low

Giving key SharePoint or portal sites an identity, or using vanity URLs, can help people refer to them by name and help spread awareness. In most organizations, the intranet

has a branded name. Similarly, some organizations have large sites or other portals that they name to help promote recognition of, and pride in, the site.

Incorporate Feedback in Portal	
Suggested Timing: Pre-Launch, Launch, Post-Launch & Ongoing	Level of Effort: Low
<p>As you release new features and functionality, provide multiple ways for users to provide feedback and for your team to take action and effectively address the feedback.</p> <p>Consider incorporating feedback on a new portal and your enterprise search results in pages as well. So if users cannot find content, they can provide feedback that will improve the search experience.</p> <p>Example: One organization provided a service-level agreement (SLA) on feedback for search results. When users commented that they couldn't find something, IT ensured it displayed in search results within a certain amount of time and provided a notification to the requestor that the item now shows up when they search (with a link to the search query and page).</p>	

Create Baited Email Hooks	
Suggested Timing: Post-Launch & Ongoing	Level of Effort: Low
<p>We want to ensure effective communication, but sometimes someone should read content in a curated portal experience or an updated document than in a short email. In these situations, you can purposefully and strategically omit certain information from an email announcement to drive the reader to visit the site. This can serve the dual purpose of getting employees to visit Microsoft 365 and ensuring the content they receive is the latest and most complete.</p>	

Remove Alternatives & Make It Mandatory	
Suggested Timing: Launch, Post-Launch & Ongoing	Level of Effort: Low

This stance can make many companies uncomfortable, but it can be a sure way to encourage the use of the platform instead of legacy alternatives that are less secure or less integrated.

This should be used in combination with guidance and education materials that help users understand how to use the technology effectively.

4.4. Education Activities: Helping People Understand the Value of Microsoft 365

These activities are designed to help people understand the value that a Microsoft 365 feature or capability can bring to their daily work. These activities can also be leveraged to help people optimize their usage of Microsoft 365.

Create Pilot & Early Adopter Yammer Groups

Suggested Timing: Pre-Launch

Level of Effort: Low

Create a Yammer group to engage with pilot members and anyone interested before launch.

Create Training Site

Suggested Timing: Pre-Launch

Level of Effort: Low

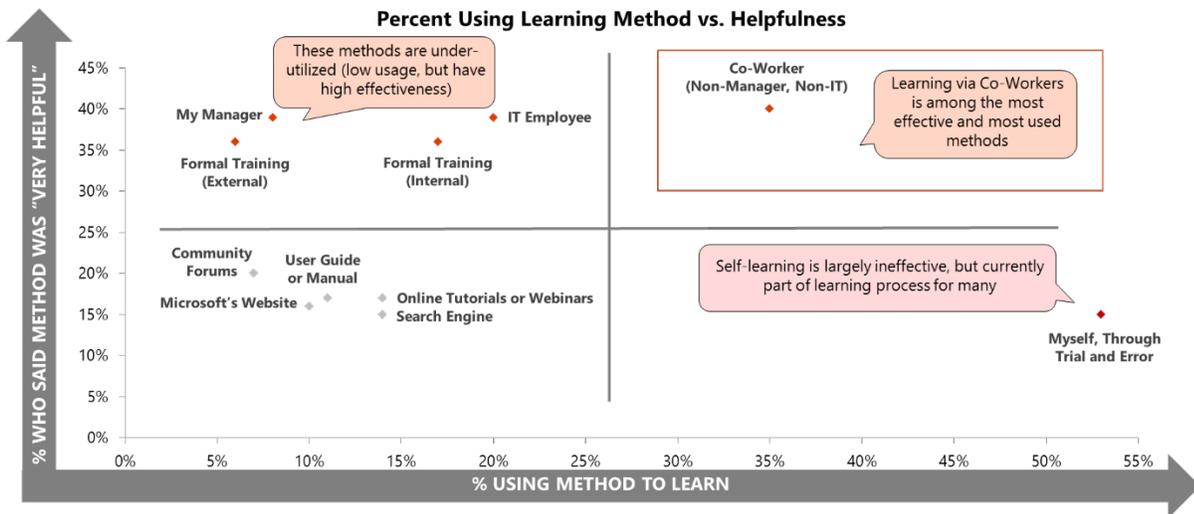
Use an internal team site to store training resources, such as getting-started guides and tips & tricks. You can also direct users to the Microsoft Microsoft 365 Learning Center: <https://support.office.com/en-US/learn/office365-for-business>.

Connect, Teach & Empower Champions

Suggested Timing: Pre-Launch, Post-Launch & Ongoing

Level of Effort: Low to High

Learning with and from coworkers is one of the most highly effective and recommended methods your organization can leverage.



To maximize the impact, frequency, and effectiveness of this form of learning, create a community of "champions" or early adopters who can be engaged to provide field-based support across the organization. Provide advanced training and an advanced escalation path for issues identified by your champions so that they can promote the solution to their peers and colleagues. This ensures that champions remain supportive and effective at teaching others in the organization by example and by direct co-worker interaction.

Hold In-Person Training Events

Suggested Timing: Pre-Launch, Post-Launch & Ongoing

Level of Effort: Low to High

Host an in-person event to train champions and pilot members. Use customizable training decks mapped to the most fundamental Microsoft 365 usage scenarios.

Conduct Baseline Survey on Microsoft 365 Understanding

Suggested Timing: Pre-Launch

Level of Effort: Low

Shortly before champions participating in your soft launch receive activated accounts and devices, circulate a baseline survey to gather data about their knowledge of Microsoft 365.

Announce & Explain New Features & Capabilities (Microsoft 365 Service Update Announcements)

Suggested Timing: Post-Launch & Ongoing **Level of Effort:** Low to Medium

Keep an eye on Microsoft 365 service updates and inform people of new features and updates as they are released.

Providing regular improvements means there is always something new to try or new uses to share that can spark interest. Announcing major and minor releases of functionality can add a sense of continued investment in the platform from the business and provides new opportunities to engage users in better ways they may be able to work.

Be sure to leverage Microsoft's new update releases in this way. They can be found at <http://Roadmap.Office.com>.

Conduct Champion Experiences Survey

Suggested Timing: Pre-Launch **Level of Effort:** Low

Optimally, you would perform multiple surveys beyond the baseline to help guide improvements to awareness and training materials.

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

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

Communicate Policies & Guidelines	
Suggested Timing: Pre-Launch, Post-Launch & Ongoing	Level of Effort: Low to High
<p>Along with end-user training, be sure to communicate your organization’s specific policies and best practices so users are aware of specific guidelines and how they’re expected to use Microsoft 365.</p>	

Share Summaries of Top Searches & Corrected Failed/Abandoned Searches	
Suggested Timing: Post-Launch & Ongoing	Level of Effort: Low to Medium
<p>For many organizations, the launch of Microsoft 365 or a new version of SharePoint is a great opportunity to improve and encourage the use of search capabilities. To that end, it can be very useful to share the top searches with users so that they know that search is being leveraged and can use those same popular searches to find content that can help them.</p> <p>It can be useful to have a search team. Many organizations assume search just works, but it often requires monitoring and improvement over time by individuals within the organization.</p> <p>Share that the search team is listening to feedback and watching for searches that return 0 results or no useful results (abandoned searches). Correcting the search, so it returns the right results, and surfacing the corrections, can encourage many to reinvest time and energy into the search experience.</p>	

Review Usage Reports & Relevant Audited Activity	
Suggested Timing: Post-Launch & Ongoing	Level of Effort: Low to Medium
<p>Measure against the success metrics you put into place by leveraging the existing reporting found in SharePoint and Microsoft 365. Additional third-party technologies</p>	

can provide advanced reporting beyond what the Microsoft technology offers out of the box. These auxiliary technologies may be worth considering to complement your efforts in better understanding the activity, adoption, and engagement of Microsoft 365 and SharePoint.

For example, it may be useful to track usage of key sites to determine the number of times certain content is shared within a specific location or to summarize more broad results such as the growth of documents being stored across OneDrive for business locations.

These reports can also help improve targeting for champion discovery, as very active users may be good targets for additional training, support, or engagement.

Incorporate Portal into New-Hire Orientation

Suggested Timing: Post-Launch & Ongoing

Level of Effort: Low to Medium

Incorporating new-hire orientation into the portal can be a great way to introduce the portal and make the onboarding process more engaging. The system can help them fill out their user profile, interact with content on various sites, and understand what technology to use when.

Incorporate Portal into Annual Training or Skills Validation

Suggested Timing: Post-Launch & Ongoing

Level of Effort: Low to Medium

Some organizations require the completion of in-person or online classes by a set date. By adding Microsoft 365 training into the annual training and skills validation process, you show leadership support and authority on the importance of the new technology or system.

Collect, Share & Support Success Stories

Suggested Timing: Post-Launch & Ongoing

Level of Effort: Low to High

While many may not see success stories or qualitative feedback as training material, often with minor effort, a real user story can be made into a training scenario that is easily understood but is an exemplary way of working and realizing the impact from using the technology involved.

Adding a button or option to enable users to submit success stories can lead to many people initiating a submission or sharing success messages. These stories show the value of the technology and help provide personalized insight into how impactful it can be.

In addition to giving people the option to share stories, make sure to present these stories effectively to users in your organization and to spend energy discovering new ones.

In one organization, each year before they went into their IT strategy and vision meetings, the team spent a week or two leading up to the meetings collecting feedback, stories, and relevant information from their users. This empowered them to celebrate and showcase technology-aided successes in the past year and also helped identify user needs, challenges, and opportunities for IT to invest in for the coming year.

Hold YamJams, Use #YamWin & Create Starter Yammer Groups

Suggested Timing: Pre-Launch, Launch, Post-Launch & Ongoing

Level of Effort: Low to Medium

There are a few Yammer groups that most organizations implement before the launch of Microsoft 365 and a new wave of collaboration and communication technologies that include Yammer.

Create a Yammer Help Group that can act as a place for people to share their questions and key resources and create a helpful Yammer community that scales your IT organization’s ability to support users. This can also be a great place to discover, identify and recognize champions.

As your coworkers use Yammer, ask them to think about ways that Yammer has helped them. Then encourage them to describe their experience and post their stories to the company network with the hashtag #YamWin.

Afterward, find the best YamWins and post them to the Yammer Help Group as examples to inspire your entire company.

Consider creating another group, called the Yammer Ideas Group. Use this group to brainstorm ways that your company can use Yammer to improve how work gets done. Ask your coworkers to share their ideas in the group. Then test out the ideas to see how they work. Showcase examples of success—brainstorm ways to improve ideas that need more work.

Consider holding YamJams, or at least an initial few, as you launch the new platform in your organization. Engage one or more executives or department heads to participate in 30–60-minute, live discussions using Yammer. Discussion topics will be predefined, and a Yammer community manager will help facilitate and moderate.

Provide Best-in-Class & Solution Showcases

Suggested Timing: Launch, Post-Launch, & Ongoing **Level of Effort:** Medium to High

Often one of the best ways for a user to learn is by example. So as individuals or teams of people in your organization build effective team sites, user profiles, groups, solutions, or more, be sure to recognize them, showcase them and share why they are great examples that others can emulate or use to improve.

This is also a great way of recognizing the impact that your champions are driving throughout the organization in helping people connect further.

Example: One organization started with this simple idea and added an official logo image to each site or solution that was a best-in-class example. Over time, they created a directory of these best-in-class examples. The solutions found within this directory became so popular that they expanded the directory into a miniature marketplace where business units could engage with one another and share how they built a solution. Some units would even provide services or support to enable another team or group to leverage their solution. IT expanded on popular solutions so that they could scale more effectively and better ensure that all existing solutions received updates and improvements in a more centralized way.

When IT or the business develops new solutions that leverage SharePoint or Microsoft 365, showcasing the solution can be extremely useful. Highlight who owns it, what its purpose is, what benefit it has provided (ROI would be great), screenshots, and more. This often leads to two useful things:

1. Users engage with one another, which decreases the cost of ownership for IT and expedites the requirements gathering process (when the business user says "I want that").
2. It enables and encourages those who have adopted or are using the platform to share their successes, be proud of them and present them in a consistent way.

Provide Community Showcases

Suggested Timing: Post-Launch & Ongoing

Level of Effort: Low

As your organization matures and begins to engage with external communities or builds and fosters its internal communities, promote these communities to other employees. This can lead to more adoption of both the community and the portal as a hub for many of these formal and informal community activities.

Provide Guidance on What Tools to Use for What Purpose

Suggested Timing: Launch, Post-Launch & Ongoing

Level of Effort: Medium to High

The goal of guiding what users can do is to highlight the many things they can do and demonstrate to them how and when they should use the technology. This graphic presents a very basic starter list of activities a user can accomplish with Microsoft 365.

Consider a relatively simple scenario, such as collaborating on techniques outlined in this whitepaper by writing them together and discussing them. Should we perform this activity in OneDrive for Business, in Outlook via email attachments, via a Lync meeting, in Yammer, or in a SharePoint team site specifically for this purpose? In this scenario, you have a plethora of ways to collaborate, each with benefits and each with

different experiences. In many cases, you might perform this activity in multiple ways that combine into a better result.

It's important to educate users on how to use the technology and provide guidance on when and what to use as well.

Seed Content

Suggested Timing: Pre-Launch, Post-Launch, & Ongoing

Level of Effort: Medium to High

When a user visits a new system, it is important that the system contains basic content and actionable and useful content that matters to the user.

As an example, if you are rolling out a Yammer network within your organization, you may want to seed content to help others better understand how and why they would use Yammer. "Prime the pump" with real questions and answers and create groups that serve a business purpose.

Example: One organization initially deployed a social network tool, and, unfortunately, the most popular content was discussions of celebrities and gossip. This is not an effective or useful network for a business, and consequently, they failed to get adoption.

When they rolled out a new social network to replace the failed one, they made sure that not only did they have well-seeded content, but that the initial pilot groups who wanted to use it could define a business purpose and reason. The resulting initial use cases demonstrated strong business benefits and ensured that not only was the starting content relevant, but the initial community was exemplary.

Later, when they opened the network to all users, people who joined the social network clearly understood how it was meant to be used.

Provide Internal Classifieds/Marketplace

Suggested Timing: Pre-Launch, Post-Launch & Ongoing	Level of Effort: Low to High
<p>Establish an effective way to redistribute business and personal assets or services throughout your organization. Consider incorporating classified sections and marketplaces into your intranet.</p> <p>Within a large enterprise, organizational units — such as divisions in a manufacturing company — can see business value in trading and buying equipment from one another. In one large company, this relatively simple solution on SharePoint provided enormous cost savings as equipment was effectively sold or reused within the company.</p> <p>Of course, there are many other uses for this application. Since it revolves around a social notice for buying or selling, it often goes beyond the sale of physical assets and can even be used for sharing babysitters, neighborhood restaurants, or any other networking information that could be useful for employees.</p> <p>This can provide one more reason for people to leverage your portal and become more familiar with the Microsoft 365 suite or SharePoint benefits.</p>	

Provide Specialized Search	
Suggested Timing: Pre-Launch, Launch, Post-Launch & Ongoing	Level of Effort: Low to High
<p>Both Microsoft 365 and on-premises SharePoint provide many of the essential elements necessary to enable modern enterprise search within an organization. Unfortunately, a successful enterprise search requires an organization to invest effort into maximizing the usage and relevancy of these elements. When you look at your enterprise search strategy and your users' behavior, some of the simplest improvements can have some of the most significant impacts.</p> <p>Beyond the basic example of creating a separate search for documents, here are two other popular search patterns that lead to higher usage and adoption:</p> <ul style="list-style-type: none"> • Consider creating a search experience that only searches PowerPoints and presentations in your organization. Not only can it help individuals find what they are looking for quickly, but it can act as a great way of showcasing popular 	

or best-bet presentations or templates that should be leveraged. Suppose you enable users to submit their presentations to be featured. In that case, you can foster the sharing of work that your users are proud of while facilitating great content discovery.

- Every organization has acronyms that not every employee is familiar with. Create an Acronym Wiki or Acronym Finder that provides users with the acronym explanation as well as relevant documents, teams, contacts, and more within the company.

Provide Usability Testing, Diary Studies, Card Sorting Exercises & More

Suggested Timing: Pre-Launch, Launch, Post-Launch & Ongoing **Level of Effort:** Low to High

Providing lots of design, information architecture, and feedback activities can greatly improve adoption by enabling you to better understand your users’ behaviors and their challenges with your design. They can furnish opportunities to improve the system.

Develop Communities & User Groups

Suggested Timing: Pre-Launch, Launch, Post-Launch & Ongoing **Level of Effort:** Low to Medium

Help people connect and sponsor or support sharing business practices, information, and ideas in your organization by creating and engaging with internal communities and user groups.

At a minimum, fostering communities and user groups are a great way to help people connect and better understand the technology while providing a channel for feedback and enterprise engagement. In many cases, the organization should invest in and develop these communities and user groups (champions are your strongest adoption asset).

Provide Internal Content Services Support

Suggested Timing: Pre-Launch, Launch, Post-Launch & Ongoing	Level of Effort: Medium to High
<p>One of the most requested areas of support is help with planning and providing effective content. This can include providing support for migrating content, permissions planning, or information architecture planning. Consider developing engagement models internally where you can go beyond basic education services and provide support in getting a stakeholder’s content into their site or group, structuring appropriate permissions and rights protection, and determining the best way to ensure search, sharing, and management of content is as effective as possible.</p>	

Provide Business Intelligence (BI) Services and a BI Community	
Suggested Timing: Pre-Launch, Launch, Post-Launch & Ongoing	Level of Effort: Low to High
<p>Many organizations are undergoing a digital transformation and becoming a data-driven culture. To support this, consider the creation of a BI @ Company site that provides a single place to explain:</p> <ul style="list-style-type: none"> • The value of Power BI • Benefits of the data catalog and what data sources are available • The importance of BI to the company • How people can obtain mentoring or BI support services • How people can request access to more data or data sources 	

5. ADOPTION ACTIVITIES CHECKLIST

What follows is an adoption activity checklist you can use to track which activities you have completed or which ones you plan on completing as you improve adoption within your enterprise. The activities are listed according to the category, along with their level of effort (LOE). Once you have identified which activities are relevant to you, ensure they are outlined effectively in an adoption roadmap so that you can coordinate across your team and organization.

5.1. Pre-Launch

Before you launch Microsoft 365 or the latest on-premises server technology, you should consider each of these activities.

Leadership		LOE
	Identify Key Stakeholders	L
	Engage Executive Sponsors	L
	Create a Well-Defined Vision for Microsoft 365	L
	Determine Actionable Goals & Map to Solutions In Microsoft 365	M-H
	Define Your Metrics for Success	M-H
	Create Your Communication Plan	L
	Train Your Helpdesk	L-M

Awareness		LOE
	Leverage Champions	L
	Create Countdown Email Campaigns	L
	Broadcast Portal Announcements	L
	Post Internal Advertisements	L

Awareness		LOE
	Show Teaser Videos	L-M
	Stage an Awareness Event	L
	Create Real Organizational Profiles	L
	Run "For Charity" Reward Campaigns	L
	Incorporate Feedback in Portal	L
	Include a FAQ Listing & FAQ Finder	M

Education		LOE
	Create Pilot & Early Adopter Yammer Groups	L
	Create Training Site	L
	Hold In-Person Training Events	L-H
	Conduct Baseline Survey on Microsoft 365 Understanding (Champions)	L
	Conduct Champion Experiences Survey	L
	Communicate Policies & Guidelines	L-H
	Provide Business Intelligence (BI) Services and a BI Community	L-H
	Seed Content	M-H
	Provide Usability Testing, Diary Studies, Card Sorting Exercises & More	L-H
	Provide Internal Content Services Support	M-H
	Develop Communities & User Groups	L-M
	Hold YamJams, Use #YamWin & Create Starter Yammer Groups	L-M
	Provide Internal Classifieds/Marketplace	L-H

Education		LOE
	Provide Specialized Search	L-H

5.2. Launch

As you launch Microsoft 365 or the latest on-premises server technologies, you should consider these activities.

Awareness		LOE
	Send Announcement Emails	L
	Host a Launch Event	L-H
	Conduct a Baseline Survey & Follow-Up	M
	Create a Feedback & Improvement Yammer Group	L
	Hold Contests & Competitions	L
	Run "For Charity" Reward Campaigns	L
	Incorporate Feedback in Portal	L
	Remove Alternatives & Make It Mandatory	L

Education		LOE
	Hold YamJams, Use #YamWin & Create Starter Yammer Groups	L-M
	Provide Best-in-Class & Solution Showcases	M-H
	Provide Guidance on What Tools to Use for What Purpose	M-H
	Provide Specialized Search	L-H
	Provide Usability Testing, Diary Studies, Card Sorting Exercises & More	L-H
	Develop Communities & User Groups	L-M
	Provide Internal Content Services Support	M-H
	Provide Business Intelligence (BI) Services and a BI Community	L-H

5.3. Post-Launch & Ongoing

After Microsoft 365, a Microsoft 365 workload, or the latest on-premises server technology is deployed and available; you should consider ongoing activities like these to bolster adoption further.

Awareness		LOE
	Send Weekly or Biweekly Tips & Tricks Emails	L
	Schedule Buzz Days (Continual Awareness Events)	L-M
	Conduct User Experience Surveys	L
	Showcase Spotlight Days	L-M
	Report on Success Metrics	L-M
	Incorporate Engaging Content into Your Portal	L
	Incorporate Daily Performance Metrics into Your Portal	L
	Create Mock Profiles	L
	Create Real Organizational Profiles	L
	Incorporate Profile Links in Employee Signatures	L
	Hold Contests & Competitions	L
	Run "For Charity" Reward Campaigns	L
	Define Portal & Site Identities	L
	Create Baited Email Hooks	L
	Incorporate Feedback in Portal	L
	Remove Alternatives & Make It Mandatory	L

Education		LOE
	Share Summaries of Top Searches & Corrected Failed/Abandoned Searches	L-M
	Review Usage Reports & Relevant Audited Activity	L-M
	Connect, Teach & Empower Champions	L-H
	Hold In-Person Training Events	L-H
	Incorporate Portal into New-Hire Orientation	L-M
	Incorporate Portal into Annual Training or Skills Validation	L-M
	Announce & Explain New Features & Capabilities (Microsoft 365 Update Announcements)	L-M
	Communicate Policies & Guidelines	L-H
	Collect, Share & Support Success Stories	L-H
	Hold YamJams, Use #YamWin & Create Starter Yammer Groups	L-M
	Provide Best-in-Class & Solution Showcases	M-H
	Provide Community Showcases	L
	Provide Guidance on What Tools to Use for What Purpose	M-H
	Seed Content	M-H
	Provide Internal Classifieds/Marketplace	L-H
	Provide Specialized Search	L-H
	Provide Usability Testing, Diary Studies, Card Sorting Exercises & More	L-H
	Develop Communities & User Groups	L-M
	Provide Internal Content Services Support	M-H
	Provide Business Intelligence (BI) Services & a BI Community	L-H

6. RECOMMENDED NEXT STEPS

Achieving greater success with any transformative technology requires focusing on driving adoption and ensuring everyone understands the benefits of working in new ways.

Before rolling out Microsoft 365, take a step back and think about why you acquired it in the first place. Was it led by specific technical requirements as part of the IT upgrade cycle, or did you discover specific needs within the business?

Driving adoption is about understanding the business challenges that you will address with solutions based out of Microsoft 365 and built on Microsoft 365. It is about ensuring that people across your organization understand the benefits the technology can (and does) provide while embracing the support and solutions you provide.

Driving adoption is a continuous cycle and doesn't end after launch day or after measuring your launch impact. Adoption is all about going beyond launch, so there is never a time not to invest further into it and the foundational governance and guidance that empowers an effective adoption plan. Look for new ways where Microsoft 365 can add business value and work diligently to communicate and share those opportunities across your organization, department, or business team.

 **NOTE:** We tried hard throughout this Whitepaper not to highlight our services, but this is a subject we are passionate about and help hundreds of organizations with. Please do not hesitate to give us a shout at Hello@2toLead.com if you are interested in getting some additional advice or assistance from our team of experts, it never hurts to ask.

Remember, your business and the cloud are in a state of constant change and continuous improvement. Seek new opportunities to improve business processes and empower people in a thoughtful and planned manner.

Keep an eye on our [Microsoft 365 Roadmap Update](#) and the [Office blogs](#) to be aware of potential new service features and updates that you can take advantage of.

7. SOURCES AND RESOURCES

We leverage our many years of expertise to put together these whitepapers. We have learned from our awarded efforts and alongside our friends in the Microsoft 365 community. We like to highlight both in the section below.

7.1. Our Whitepapers & Related Resources

A few of our popular (and comprehensive) whitepapers:

Most Common SharePoint and Teams Sprawl Issues and How to Find Them

[This eBook](#) covers 8 of the most common sprawl issues organizations face today. These issues plague organizations everywhere, and solving them is crucial to increasing employee time and cost. Not only will you gain insight into the ways you can solve these issues, you will also learn why these issues matter to both IT and end-users.

Core eBook Topics

- Understanding Digital Workplace Sprawl
- The Most Common Sprawl Issues and How to Solve Them

SharePoint Migration

This [70+ page whitepaper](#) has over 100 different questions that your organization should be able to answer, your migration vendor should be able to answer, and your migration partner should be able to answer, along with essential insights you should consider.

Core Whitepaper Topics

- Business Drivers For Migration
- Migration Planning, Migration Strategy & Migration Roadmap Planning
- Risks To Success

External Sharing With Office 365: What You Need To Know

This [30+ page whitepaper](#) outlines all of the key decisions and how to make them when it comes to enabling external sharing in Office 365 and when/where you may want to configure or extend those capabilities.

What to expect

- External Sharing Decisions & Guidance
- External Sharing & External User Roadmap

Measuring the Business Impact & ROI of Office 365

This [60+ page whitepaper](#) outlines many key considerations around how to measure the impact Office 365 has on a business while also outlining how Office 365 provides effective reporting capabilities today.

What to expect

- Understanding & Aligning Business Objectives
- Business Impact & ROI By Office 365 Capability Mapping
- Business Impact & ROI Calculation & Measurement Examples

Microsoft 365 Intranets: What You Need To Know

This [160+ page whitepaper](#) has everything you need to know to successfully leverage Microsoft 365 Intranets and Digital Workplaces and amplify internal communication and collaboration to new heights.

Core Whitepaper Topics

- Understanding Microsoft 365 Communication and Collaboration Tools
- Benefits of a Microsoft 365 Intranet and Digital Workplace
- Best Practices Across Technology, Design, and Leadership

“When to Use What” In Office 365

This [70+ page whitepaper](#) is a guide to providing the right kind of enterprise user guidance for Office 365.

What to expect

- Which Tool When: Options, Scenario Recommendations & Examples

7.2. Recommended Industry Perspectives

There are great reports and articles on what's new in Intranets, what is innovative, and what makes for an award-winning Intranet. Are you looking for more interesting perspectives on what makes a good Intranet? Be sure to check out the latest trends in popular annual reports like [Nielsen Norman report on Intranet design](#), [Step Two's report on Intranet Innovations](#), which is well worth reading. We are humbled to have brought together a team of Neilson Norman, Step Two, and various other award winners, along with other incredible industry professionals.

Tipping our hat to other industry experts

As we mentioned, we have also learned alongside some talented experts that we have crossed paths with on more than one occasion in the community in general or at the many Microsoft 365 events globally. We would like to shine a light on them here.

[Susan Hanley](#)

"Sue is a recognized expert in the design, development, and implementation of successful portal solutions, with a specialization in Microsoft SharePoint. Since 2015, Sue has been recognized as a Microsoft MVP for Office Apps and Services. She is a frequent writer and speaker on the topic of building effective collaborative portals, portal governance, user adoption, and information architecture, as well as building communities of practice and measuring the value of knowledge management investments."

[Michal Pisarek](#)

"Michal Pisarek, CEO of Orchestry Software, is a Microsoft SharePoint MVP, an award that is given to experts in the Microsoft SharePoint community for sharing their passion, technical expertise, and real-world knowledge. Acknowledged as a thought leader in the SharePoint space, he is a frequent speaker at many international events and has been referenced in publications and presentations by organizations such as Gartner and StepTwo."

[Joanne C Klein](#)

A key area Joanne focuses on "... is the Microsoft 365 tools built to help organizations protect, retain, and secure their unstructured content now being produced at an exponential rate. This

is an important shift for organizations and their information workers to make in today's modern, digital workplace."

[Vlad Catrinescu](#)

"Vlad is also a Microsoft Most Valuable Professional (MVP) since 2013 and has his own blog at <https://VladTalksTech.com>. He also shares his knowledge by speaking at conferences around the globe and at local community events. Vlad is often featured as an expert on other industry-related websites and blogs."

8. About 2toLead

2toLead has been labeled as a generous Microsoft consulting company by its clients and employees. 2toLead employs trusted, passionate and experienced consultants who work hard to solve the most challenging business and technology problems that face our clients.

Awarded Experience, Here to Help

Whether you are reinvigorating your Microsoft 365 digital workplace or thinking about starting your journey, Microsoft 365 is a sure-fire way to improve digital communication and collaboration.

Microsoft 365 out of the box is already a massive step in the right direction, but the advantages can be astronomical with the proper guidance. We would love to be the consultants who help guide you to your optimal digital workplace. Our team is ready to show you that *"You will love the way we work. **Together.**"*

Top 3 Ways 2toLead Helps Customers



INCREASE ADOPTION by going far beyond just deploying things right and ensure your organization is being pro-active in getting the maximum value out of your technology investments.



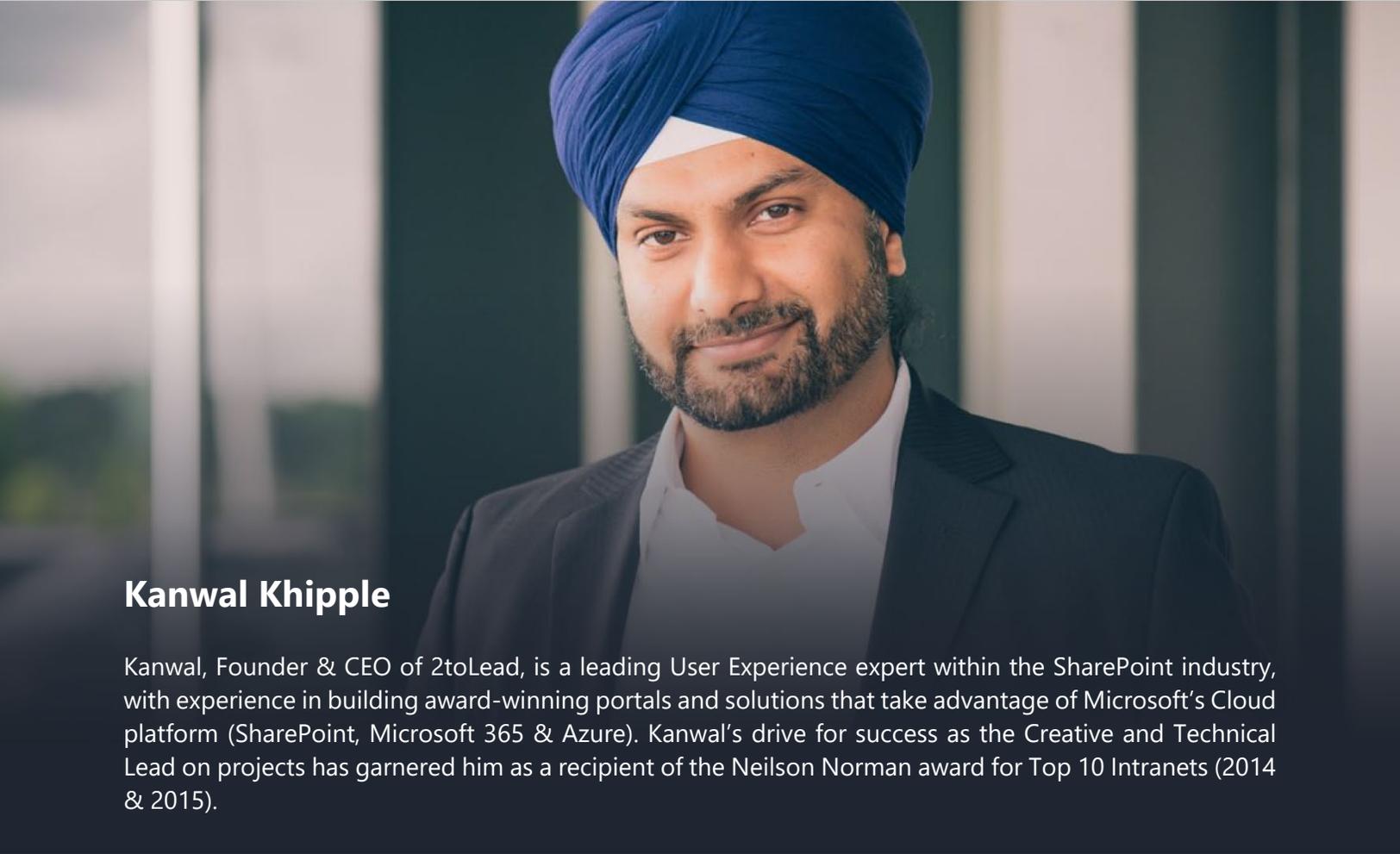
IMPROVE EXPERIENCES & ENGAGEMENT by understanding where, how, and why users interact with your business while building world-class portals, social networks, and websites that your customers, partners and users love.



LEVERAGE THE CLOUD to reduce costs, improve business agility and capabilities inside and outside of your organization by leveraging cloud technology like Office 365 and Azure.

For more information:

- Visit our website at www.2toLead.com
- Follow us on LinkedIn
- Like us on Facebook
- Follow us on Twitter @2toLead



Kanwal Khipple

Kanwal, Founder & CEO of 2toLead, is a leading User Experience expert within the SharePoint industry, with experience in building award-winning portals and solutions that take advantage of Microsoft's Cloud platform (SharePoint, Microsoft 365 & Azure). Kanwal's drive for success as the Creative and Technical Lead on projects has garnered him as a recipient of the Neilson Norman award for Top 10 Intranets (2014 & 2015).

Kanwal's passion lies in continuing to push for user experience innovation when redesigning intranets for the majority of the largest brands in the world. He continues to preach on the importance of designing with usability as the primary focus. Kanwal's thirst to share knowledge has made him a prominent figure within the SharePoint community. Because of his passion and involvement in many community-driven events, including launching successful user groups in Canada and the USA, Kanwal has been recognized as a SharePoint MVP by Microsoft (2009 to 2020) and as a Microsoft 365 MVP (2014-2021). He's also co-authored a book on Pro SharePoint 2013 and Responsive Web Development <http://amzn.to/sp2013rwd>

Feel free to reach out to him if you'd like to discuss your project, want to run an idea by him, or just want to reach out to a friendly technologist.



<http://www.twitter.com/kkhipple>



www.Linkedin.com/in/KanwalKhipple



www.Slideshare.net/kkhipple



+1-416-888-7777



Kanwal@2toLead.com



RICHARD HARBRIDGE

Richard is the Chief Technology Officer and an owner at 2toLead. Richard works as a trusted advisor with hundreds of organizations, helping them understand their current needs, future needs, and actions they should take to grow and achieve their bold ambitions.

Richard remains hands-on in his work and has led, architected, and implemented hundreds of business and technology solutions that have helped organizations transform - digitally and organizationally. Richard has a passion for assisting organizations in achieving more, whether it is helping an organization build beautiful websites to support great content and social strategy or help an organization leverage emerging cloud and mobile technology to better service their members or the communities they serve.

Richard is an author and an internationally recognized expert in Microsoft technology, marketing, and professional services. As a sought-after speaker, Richard has often had the opportunity to share his insights, experiences, and advice on branding, partner management, social networking, collaboration, ROI, technology/process adoption, and business development at numerous industry events worldwide. When not speaking at industry events, Richard works with Microsoft, partners, and customers as an advisor to business and technology, and serves on multiple committees, leads user groups, and is a Board Member of the Microsoft Community Leadership Board.



<http://www.twitter.com/rharbridge>



<http://www.Linkedin.com/in/rharbridge>



www.Slideshare.net/rharbridge



+1-416-300-3678



richard@2toLead.com

JUST THE BEGINNING

We have **helped over 100 organizations** build stronger Intranets and Internal Communications.

With the guidance of our **Multiple Microsoft MVPs & Neilson Norman Award Winners**, we would love to show you how we can elevate your Intranet and Digital Workplace.

Your journey to a better digital workplace starts with a **Free 2-Hour Assessment**, with no obligations or commitments, of your digital workplace.

[THE FIRST STEP TO BETTER ADOPTION](#)



YOU WILL LOVE THE WAY WE WORK. **TOGETHER.**
