

Michael Sampson



WORKSHOP

Driving Effective Use of Office 365

Driving Effective Use of Office 365 - The Workshop (August 2016 Edition)

By Michael Sampson

This is the workbook for the Driving Effective Use of Office 365 Workshop (August 2016 Edition). The workshop is designed to help firms develop a strategy for incorporating appropriate Office 365 capabilities into day-to-day work.

For information on the workshop and to schedule Michael to present it at your organisation, see michaelsampson.net/workshops/office365effectiveuse-workshop/.

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Opening
Comments

What Does
Effective Use
Look Like?

Surrounding
Context

Drivers for
Effective Use

Developing
Usage
Competence

Effective
Use

Extending
Effective Use

Building
Your
Framework

Closing
Comments



Opening Comments



1

Construct a Framework

2

Analyse Context Factors

3

Explore Options

4

Compare Experiences

Why this workshop?



Microsoft is
pushing Office 365
very hard

Achieving
value requires
much more than
new tools

Many
organisations
need effective
guidance on
adoption



Drivers for
Effective Use

Developing
Competence

Strategies for
Cultivating
Effective Use

Extending
Effective Use

Building Your
Framework

Context

Michael

Management
Consultant

Consultant
Facilitator
Author

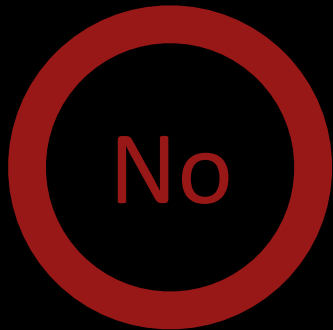
Pivot Theme

Facilitating
Impact from
New Approaches
to Work

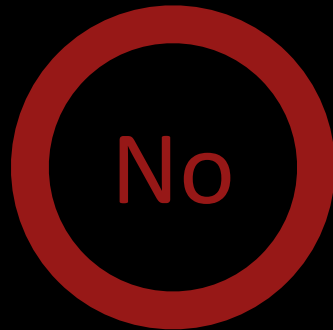
Market

End User
Organisations
(not vendors)

Decision makers
wanting a second
opinion on strategies
and projects



Partnerships
with
vendors



Commission
on product
sales



Financial
interests in
vendors

Clients, workshops, and
presentations around the world

2008

2009

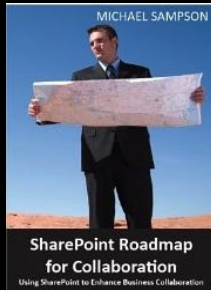
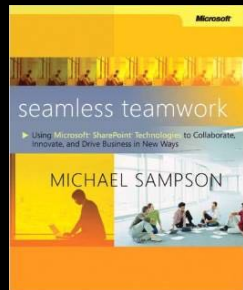
2010

2011

2012

2013

2016



SharePoint

User Adoption

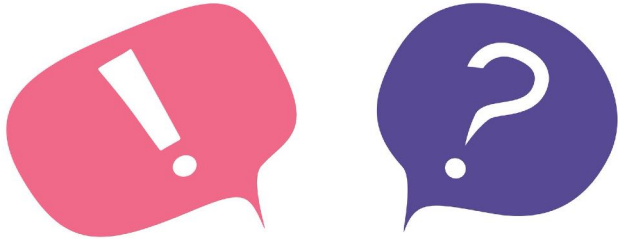
Governance

Office 365

Business Strategy



What's happening with
Office 365 in your work?





What Does Effective Use Look Like?

A photograph showing the front-left corner of a silver car with significant damage. The hood is crumpled, the headlight is shattered, and the front bumper is missing. The front wheel is visible, and the car is parked on a paved surface.

What Does
Effective
Use Look
Like?

1

The Reoccurring Problem

New Tools, No Improvement.

Lotus Notes only for email.

SharePoint as the new file server.

Lync as only the new phone.

A high-speed train, primarily blue and yellow with purple accents, is shown in motion on a track. The background is blurred to convey speed. A dark grey rectangular box is superimposed over the center of the image, containing white text. The train's front features a large black windshield and two sets of headlights with red and white lenses. The side of the train has a purple section with a blue and white wave-like graphic.

Work must be done at the office.

An overhead view of an open-plan office with several people working at wooden desks. The desks are cluttered with various office supplies, including keyboards, mice, coffee cups, pens, and papers. One person is using a tablet, another is on a phone, and others are typing on keyboards. A large, semi-transparent dark grey banner with white text is centered across the image.

Open plan offices, no talking.

Figure 10: Which THREE of these are the biggest impediments to wider implementation of Enterprise 2.0 in your organization?
(>10 employees, N=656)

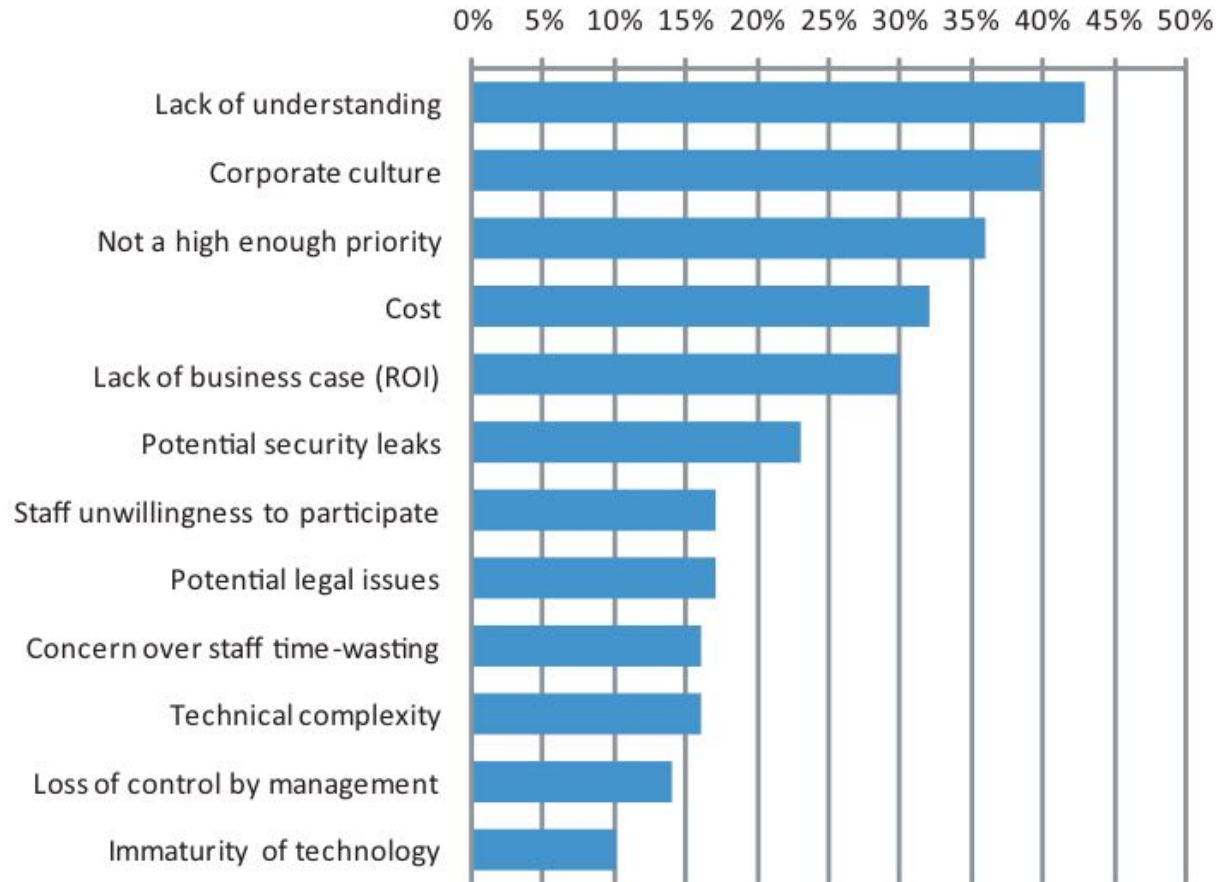
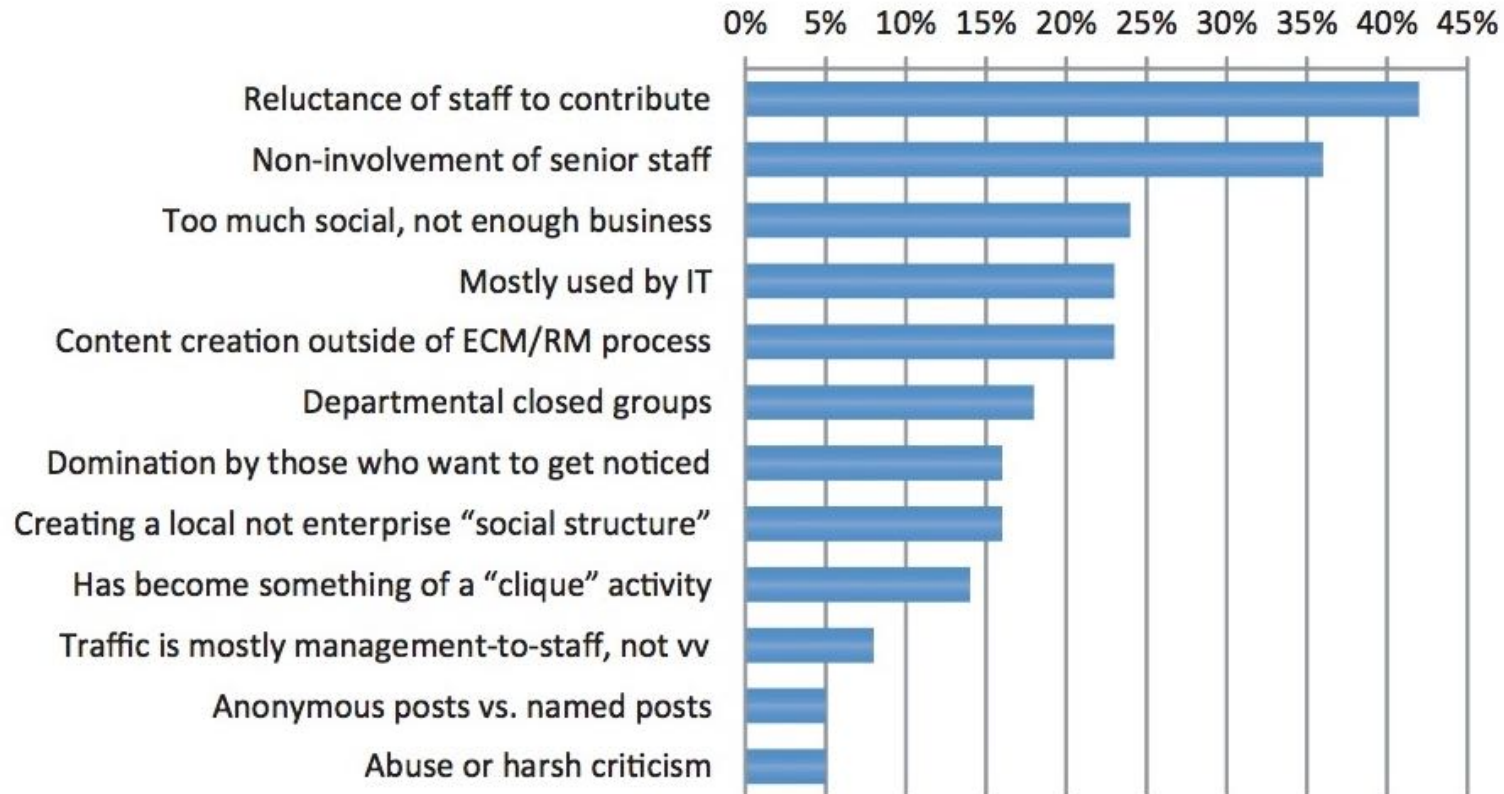
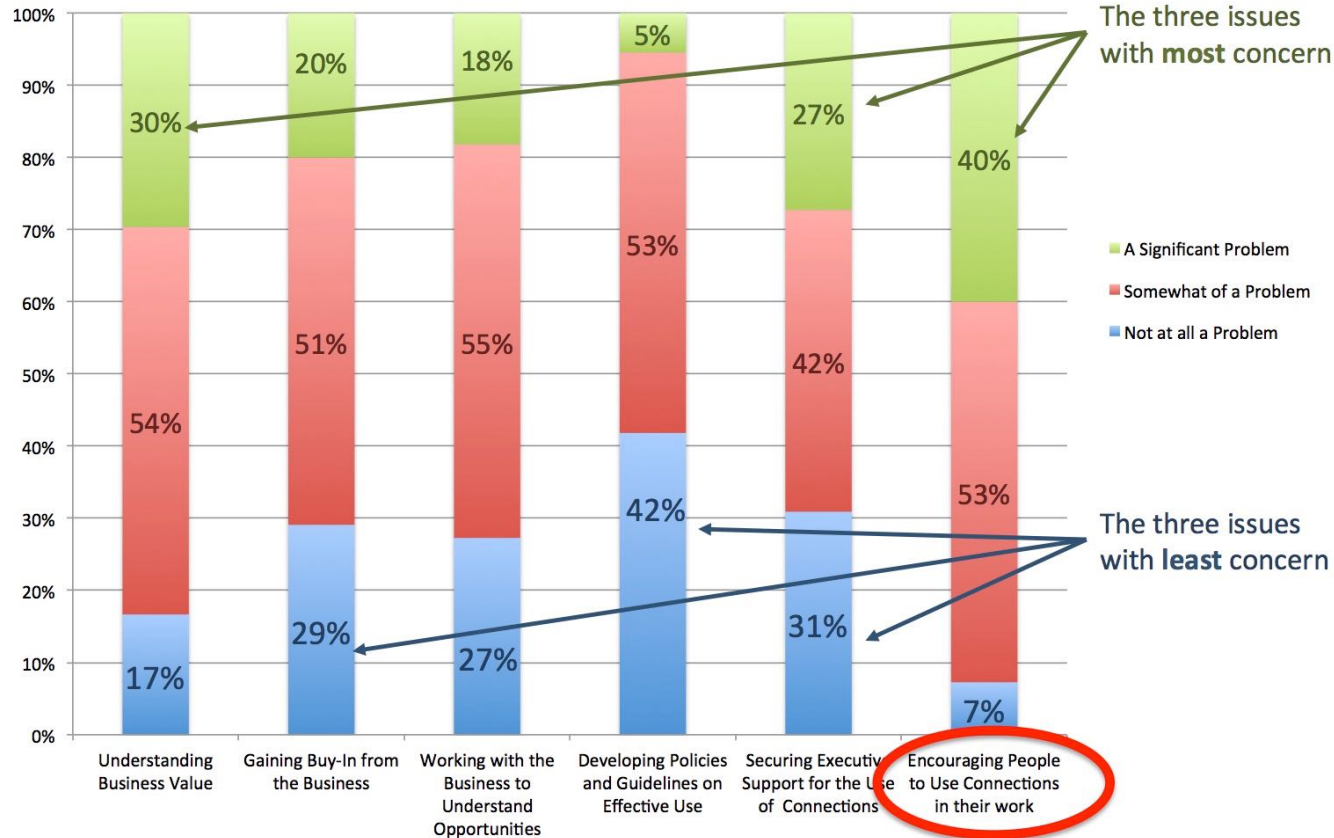


Figure 9: What would you say are the **THREE** biggest issues you've found with social business/E2.0 applications in your organization? (N=398)





Biggest Ongoing Issues for SharePoint (AIIM, 2013)



Organisational Problems Experienced with the Use of IBM Connections

Is there a better way?



What Does
Effective
Use Look
Like?

2

Frameworks to Address

R

O

A

D

M

A

P



Really Understand
the Technology

R

O

A

D

M

A

P

Really
Understand
the
Technology

Outline the
Vision

R

O

A

D

M

A

P

Really
Understand
the
Technology

Outline
the Vision

Accept that Technology
is a Small Factor in Success

R

O

A

D

M

A

P

Really
Understand
the
Technology

Outline
the Vision

Accept that
Technology
is a Small
Factor in
Success

Determine Your
Governance Approach

R

O

A

D

M

A

P

Really
Understand
the
Technology

Outline
the Vision

Accept that
Technology
is a Small
Factor in
Success

Determine
Your
Governance
Approach

Make Every Effort to
Engage the Business

R

O

A

D

M

A

P

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Understand
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Technology

Outline
the Vision

Accept that
Technology
is a Small
Factor in
Success

Determine
Your
Governance
Approach

Make Every
Effort to
Engage the
Business

Apply Intentional
Energy to Adoption

R

O

A

D

M

A

P

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Understand
the
Technology

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the Vision

Accept that
Technology
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Factor in
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Adoption

Pursue
Increasing
Value

R

O

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D

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Intentional
Energy to
Adoption

Pursue
Increasing
Value

ROADMAP

STAGE 1
Winning
Attention

STAGE 2
Cultivating
Basic Concepts

STAGE 3
Enlivening
Applicability

STAGE 4
Making
It Real

A man in a dark suit and white shirt is shown from the chest up, looking slightly to the right with a thoughtful expression. His hand is near his chin. In the background, there is a chalkboard with a drawing of a lightbulb with jagged rays emanating from it, symbolizing an idea or insight.

What Does
Effective
Use Look
Like?

3

Thinking About Effective Use

Surrounding
Context

Drivers for
Effective
Use



Developing
Usage
Competence



Effective
Use



Extending
Effective
Use

Valued
Outcome

Productive
Behaviours

**Effective
Use**

Efficient
Process

The Best
Tool

Effective
Use

Valued
Outcome

**Someone needs to get
something of value**

Initiator or
Recipient(s)

Immediate
term or long-
term

Many profiles
of value

Communicating an Idea
Seeking Help
Sharing Expertise

Effective
Use

Productive
Behaviours

**Productive and effective behaviours
aligned with the outcome need to be
put into practice**

Making
Decisions

Explore options
before settling on
an answer

Co-Authoring
Documents

Broad sweep
before spelling
and grammar

Staffing a
Call Centre

Regular opportunity
to talk together

**Effective
Use**

**Efficient
Process**

**The way the process is designed
is efficient**

**Eliminate
waste**

**Engineer
non-value
added steps
out**

**Learning &
continuous
improvement**

Effective
Use

The Best
Tool

**The best tool for the task is used
within the process or activity**

Single tool or
multiple tools

Balancing
the pros and
cons of tools

Simple
heuristics for
the best way

For example ...

**Effective
Use**

**Valued
Outcome**

Keep employees informed of new happenings across the organisation

**Productive
Behaviours**

Clear and concise communication of facts and details
An ability to seek clarification or give feedback

**Efficient
Process**

Communicators can write / create / record the update and get feedback from co-creators in context
Employees get alerted to new updates, and can respond

**The Best
Tool**

SharePoint announcement (with an alert)
Yammer announcement (on All Company)
Video announcement via the Video Portal

Microsoft

“When customers use the service on a regular basis, realise the value of the service, and the service becomes critical to their daily lives and work.”

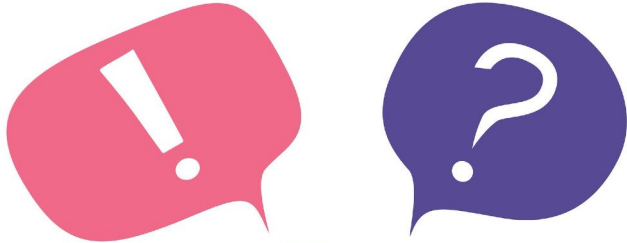


Use
regularly

Realise
the value

Critical to
daily stuff

What does effective use look
like in your work?





Organisational and Business Context

Surrounding
Context

Drivers for
Effective
Use

Developing
Usage
Competence

Effective
Use

Extending
Effective
Use



**Surrounding
Context**

Technology
Acquisition
Approach

Changing
Nature of
Work

Scenarios
of the
Possible

Governance
and
Guidelines

Business &
Financial
Case

Surrounding
Context

1

Technology Acquisition Approach



How It's Purchased Makes a Difference

Surrounding
Context

1

Technology
Acquisition
Approach

- Driven by IT = less effective
- Business group involvement = better

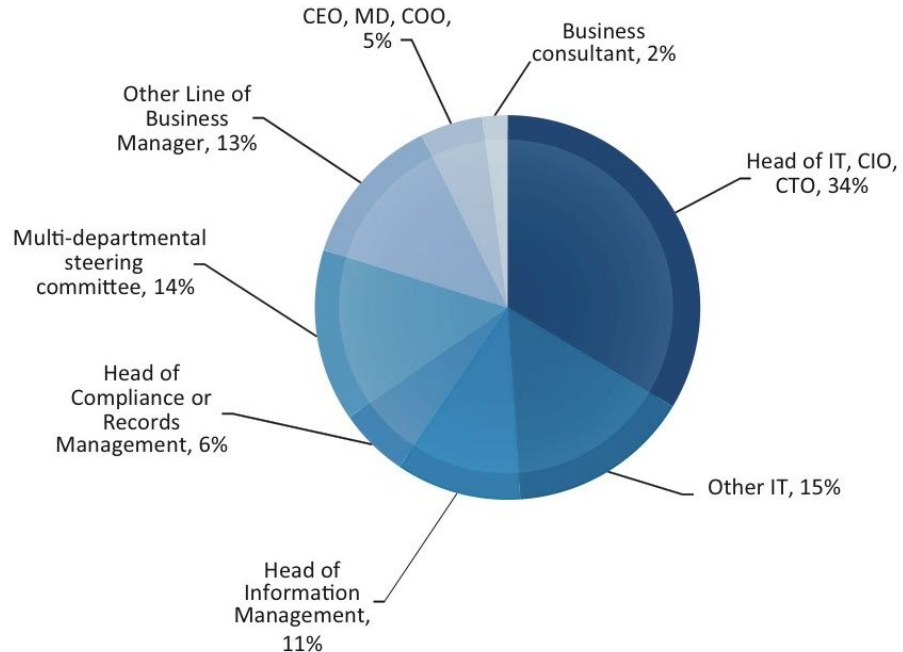
AIIM (2013) on SharePoint

Surrounding
Context

1

Technology
Acquisition
Approach

Figure 7: Who would you say is the current driving force in your organization for moving SharePoint forward and extending its scope? (N=476, excl. 58 N/A)



McKinsey (2008) on Approach

Surrounding Context

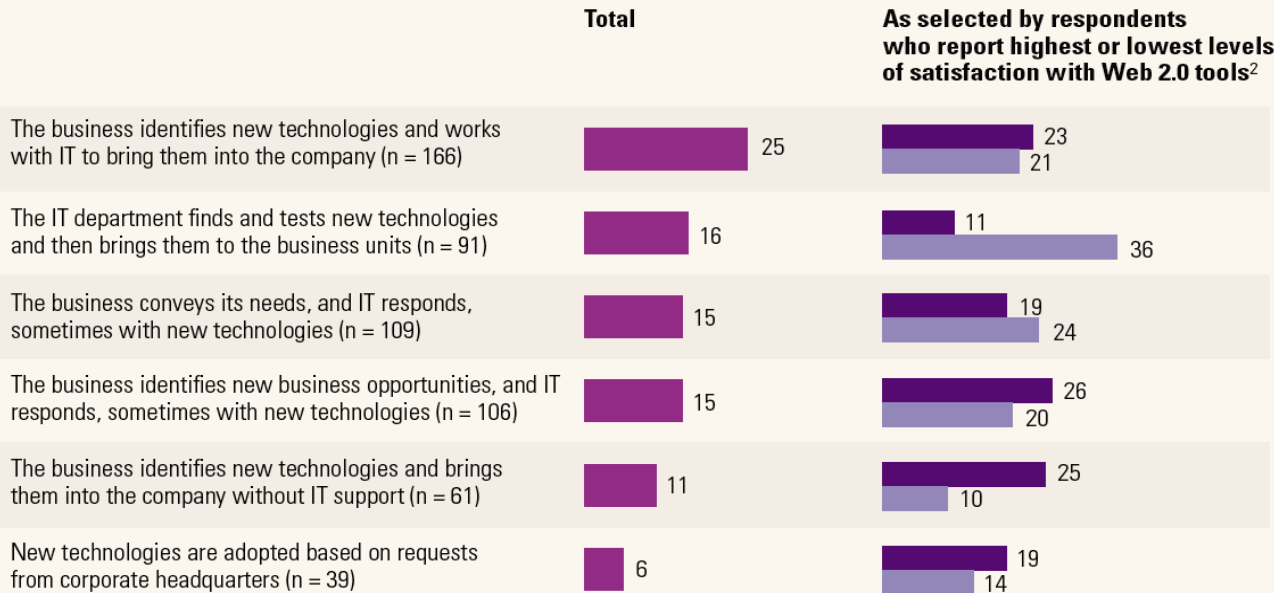
1

Technology Acquisition Approach

% of respondents,¹ n = 1,477

■ Respondents who report highest satisfaction
■ Respondents who report lowest satisfaction

Which statement best describes how Web 2.0 technologies are adopted at your company?



Some Changes are Almost Invisible

Surrounding
Context

1

Technology
Acquisition
Approach

- Exchange On-Premises to Exchange Online
 - Les Mills (November 2011)
 - Exchange on-premises failed for two weeks
 - Shifted to Office 365

Other Changes are Not Invisible

Surrounding
Context

1

Technology
Acquisition
Approach

- New ways of working:
 - Communicating through Lync
 - Collaborating via SharePoint
 - Interacting through Yammer
- Requires interaction / engagement with business groups and users

Case Study: Financial Services

Surrounding Context

1

Technology Acquisition Approach

- 500 people, 3 offices across the world
- IT sees opportunities for Office 365 (SharePoint, Yammer)
- Various aligned business drivers
- IT seeks out business involvement and engagement
 - Discussions, Interviews, Workshops, Coaching

Case Study: Professional Services

Surrounding Context

1

Technology Acquisition Approach

- Global professional services firm
 - Business trend: competitors talking up their journey with Enterprise Social
 - Business need: track, understand, adjust or ignore?
 - Office 365 offers new ways of doing current work
- Strong business drive for Yammer

Conclusion and Discussion

Surrounding
Context

1

Technology
Acquisition
Approach

- Office 365 cannot be successful for an organisation when IT works in isolation from business groups and teams.
- DISCUSSION QUESTION
What's the approach at your firm?



Surrounding
Context

2

Changing Nature of Work



Surrounding
Context

2

Changing
Nature of
Work

UberBLACK

THE ORIGINAL



Your own private driver, on demand.
Expect pickup in a high-end sedan within minutes.

uberX

TAXI

BLACK

SUV

LUX



Surrounding
Context

2

Changing
Nature of
Work



Dates

Room Type ☐ Entire Place ☐ Private Room ☐ Shared Room

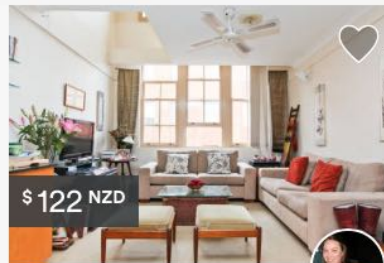


More Filters

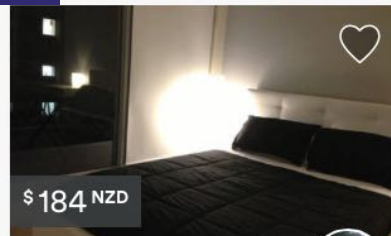
274 Rentals · Sydney



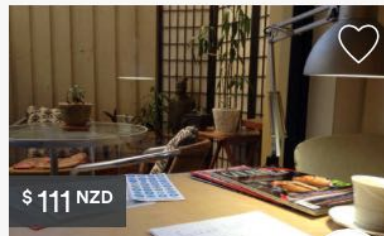
Harbour City Penth...
Home/apt · 58 reviews · Pyrmont



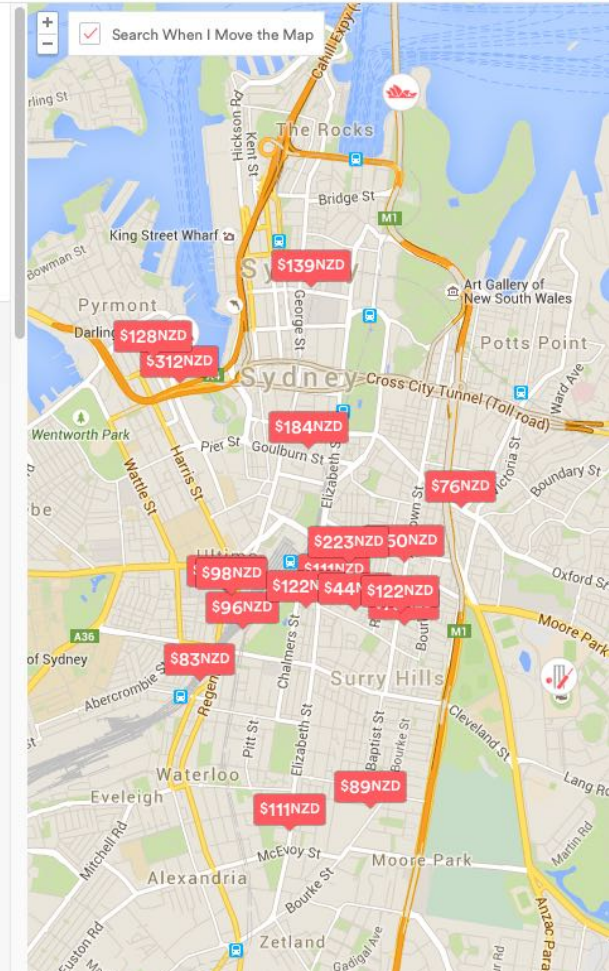
Gorgeous loft near Central ...
Private room · 175 reviews · Surry Hills



\$184 NZD



\$111 NZD



Surrounding
Context

2

Changing
Nature of
Work

Surrounding
Context

2

Changing
Nature of
Work



Surrounding
Context

2

Changing
Nature of
Work



2

**Surrounding
Context**

**Changing
Nature of
Work**

Technology



**Work
Process**

2

Surrounding
Context

Changing
Nature of
Work

Technology

Org
Structure

Work
Process

2

Surrounding
Context

Changing
Nature of
Work

Technology

Org
Culture

Org
Structure

Work
Process

2

Surrounding
Context

Changing
Nature of
Work

Technology

Business
Model

Org
Culture

Org
Structure

Work
Process

2

**Surrounding
Context**

**Changing
Nature of
Work**

Technology



**Business
Model**

**Find the Best
Talent Across
the World**

2

Surrounding
Context

Changing
Nature of
Work

Technology

Business
Model

Org
Culture

Find the Best
Talent Across
the World

Openness,
Transparency,
Outcomes

2

Surrounding
Context

Changing
Nature of
Work

Technology

Business
Model

Org
Culture

Org
Structure

Find the Best
Talent Across
the World

Openness,
Transparency,
Outcomes

Virtual,
Seamless,
Digital Place

2

Surrounding
Context

Changing
Nature of
Work

Technology

Business
Model

Org
Culture

Org
Structure

Work
Process

Find the Best
Talent Across
the World

Openness,
Transparency,
Outcomes

Virtual,
Seamless,
Digital Place

Office 365 =
Digital Office

Surrounding
Context

2

Changing
Nature of
Work



CISCO TM

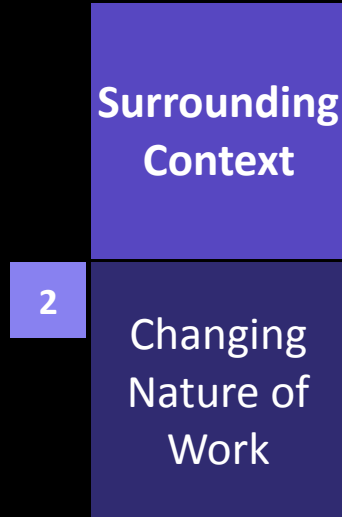
**Surrounding
Context**

2

**Changing
Nature of
Work**

'ASB

Organisational changes can drive rapid change



- “Organisational chaos”
 - Merger or acquisition
 - Natural disaster (earthquake)
 - Bribery scandal
 - Market collapse
 - Approaching bankruptcy

Conclusion and Discussion

Surrounding
Context

2

Changing
Nature of
Work

- Environmental changes are forcing a re-think of more than just work practice.
- DISCUSSION QUESTION
What is changing in your environment, and how do these create drivers for change?

**Surrounding
Context**

3

Scenarios of the Possible



What could Office 365 transform?

Surrounding
Context

3

Scenarios
of the
Possible

- Common work scenarios in your firm
- Possibilities for re-thinking / re-designing
- Where's the opportunity to improve productivity (new tools, new approaches)?

Common Work Scenarios

Surrounding
Context

3

Scenarios
of the
Possible

- Working on documents
- Having meetings
- Holding discussions
- Capturing ideas for innovation

Common Work Scenarios

Surrounding
Context

3

Scenarios
of the
Possible

- Running projects
- Sharing learning and best practice
- Making decisions
- Finding expertise

Case Example - Professional Services Firm

Sell expertise (core currency)

Need profiles plus analytics-based identification

Common Work Scenarios

Surrounding
Context

3

Scenarios
of the
Possible

- Distributing updates
- Creating efficient workflows
- Process standardisation

Case Example - International Seeds Company

International expansion through acquisition
Need a way of enforcing common processes

Conclusion and Discussion

Surrounding
Context

3

Scenarios
of the
Possible

- Office 365 offers a set of possibilities for re-thinking work scenarios.
- DISCUSSION QUESTION
Which ones make most sense for your organisation?



Surrounding
Context

4

Governance and Guidelines

The supporting structure with ...

Surrounding
Context

4

Governance
and
Guidelines

- Vision alignment, direction, momentum, good practice controls, escalation paths
- Pointing the use of Office 365 in the right direction (destination, monitoring)

Deals with issues like ...

Surrounding
Context

4

Governance
and
Guidelines

- End goal (desired destination)
- Guidance on methods of getting there:
 - Which tools for which purposes
 - Roles and responsibilities (freedoms/requirements)
 - Lifecycle management of sites and content
 - Organisational structure and decision process

Conclusion and Discussion

Surrounding
Context

4

Governance
and
Guidelines

- A mature approach to IT governance sets a good context for the effective use of Office 365.
- DISCUSSION QUESTION
How mature is your thinking and approach around governance?



Surrounding
Context

5

Business & Financial Case

It worries me when ...

Surrounding
Context

5

Business &
Financial
Case

- A business case with financial analysis is not done, or only done half-heartedly
- The IT department decides to “go Office 365” without the decision being put under the microscope by business leaders
- The vendor “gifts the tools” to a firm

Benefits of doing it properly

Surrounding
Context

5

Business &
Financial
Case

- Forces careful thinking and analysis about business impacts
- Leverages the standard processes within the firm for doing something new/different
- Strengthens the foundation for business embrace and effective use

Highlights the pricing challenges ahead

Surrounding Context

5

Business & Financial Case

Digital Work & Life Experiences Economic Transformation

	Transactional Customer	Existing EA Customer	New EA Customer
On-Premise	Buys every 5-7 years	Software Assurance	License + SA for first 3 years, SA only thereafter
Office	Office Standard + Core CAL	Office Professional Plus + Core CAL	Office Professional Plus + Core CAL
Office 365	E-3	E-3	E-3
Increase in Lifetime Value	1.8x	1.4x	1.2x

Conclusion and Discussion

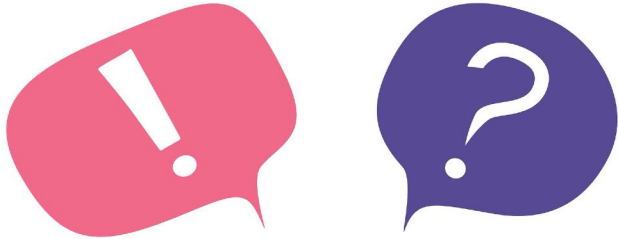
Surrounding
Context

5

Business &
Financial
Case

- Going through the process of building a business and financial case is a good exercise to test thinking.
- DISCUSSION QUESTION
What does the business case for shifting to Office 365 look like for your firm?

What is your organisational and business context for Office 365?





Drivers for Effective Use

Surrounding
Context

Drivers for
Effective
Use



Developing
Usage
Competence



Effective
Use



Extending
Effective
Use

**Drivers for
Effective
Use**

Enables
Business
Strategy

Core to a
Business
Process

Executive
Mandate

Consultancy
Process

Self-
Identified
Opportunity

Specific
Real-to-Life
Scenarios

In-Group
Social
Expectation

Self-
Assessment
Tool

A close-up photograph of a silver compass with a black face and red needle, resting on a topographic map. The map features contour lines, a red grid, and various geographical labels. In the foreground, a thick, orange-brown braided rope is visible, slightly out of focus. The overall scene suggests navigation and strategy.

Drivers for
Effective
Use

1

Enables Business Strategy

Business Strategy Requires It

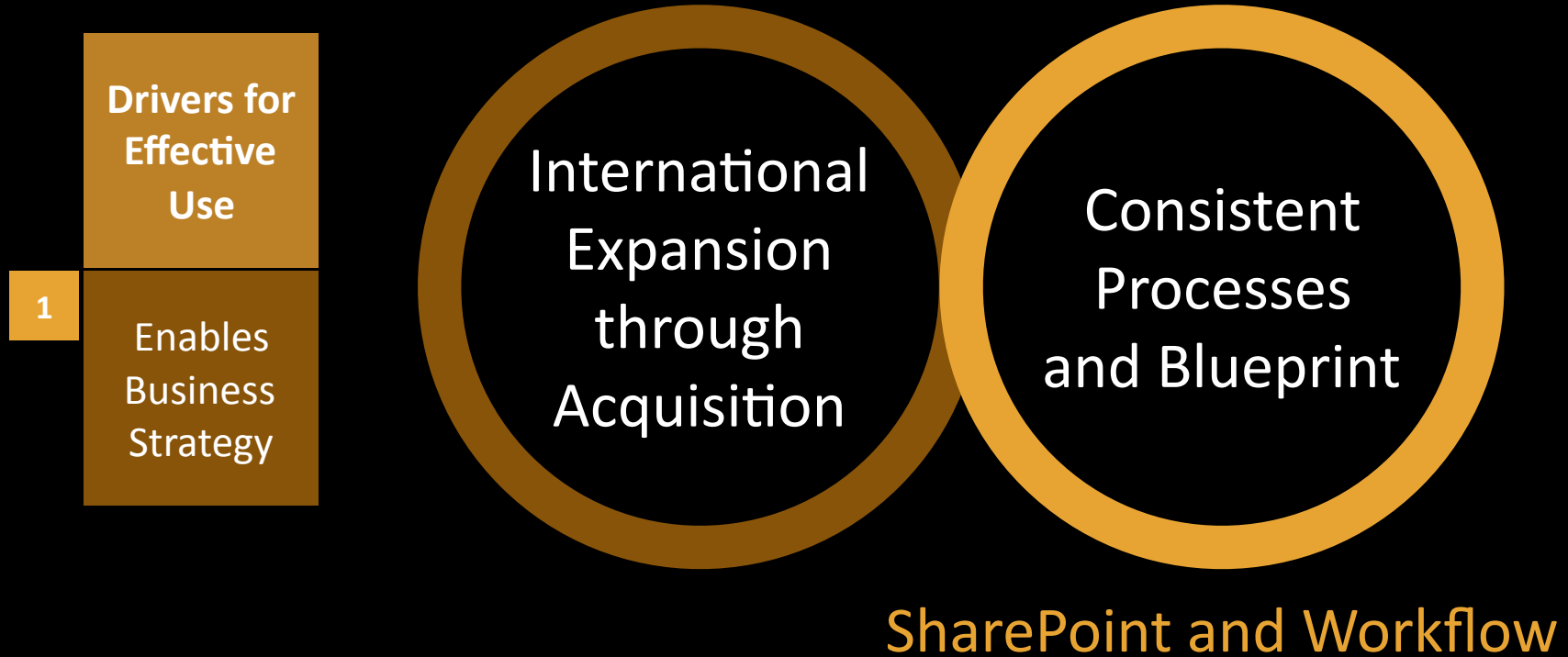
Drivers for
Effective
Use

1

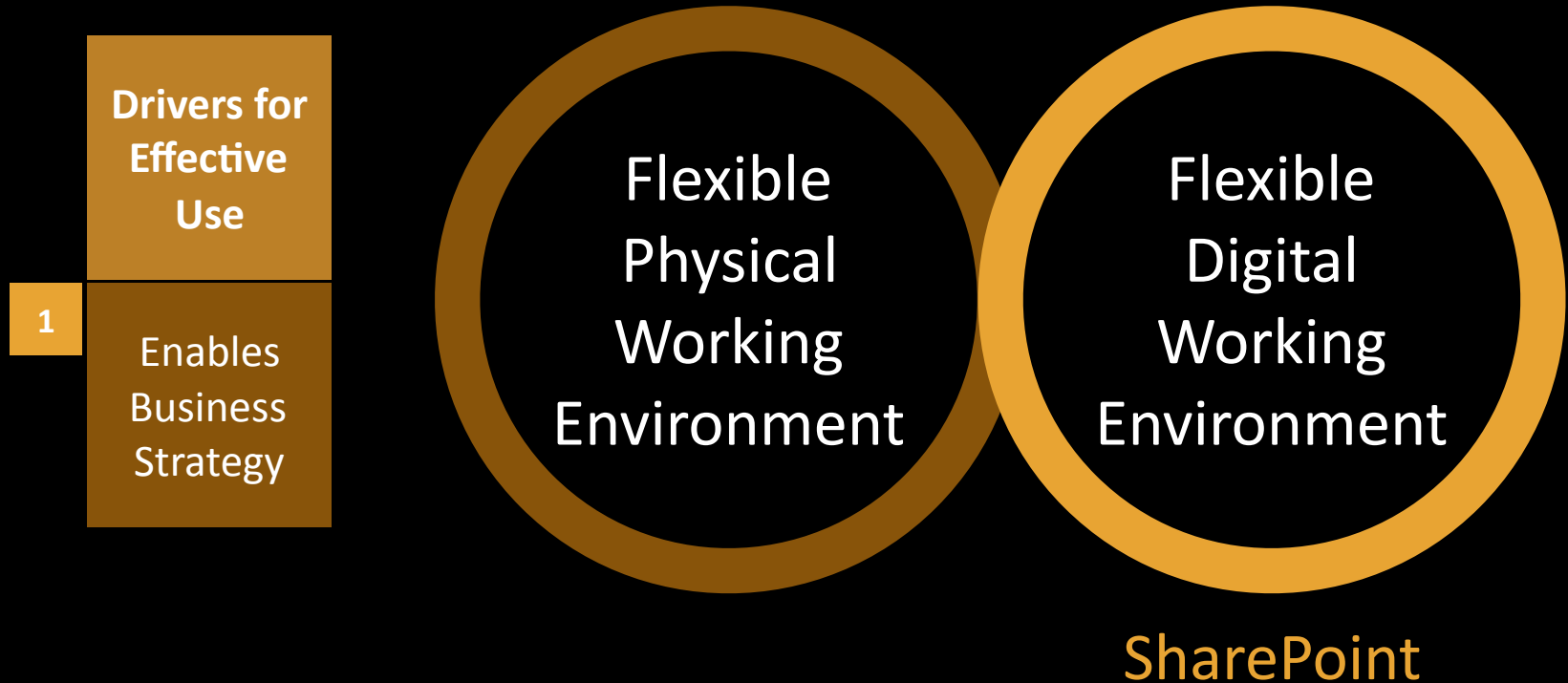
Enables
Business
Strategy

- Strategy can't be achieved without it
- Various capabilities of Office 365 enable the business strategy

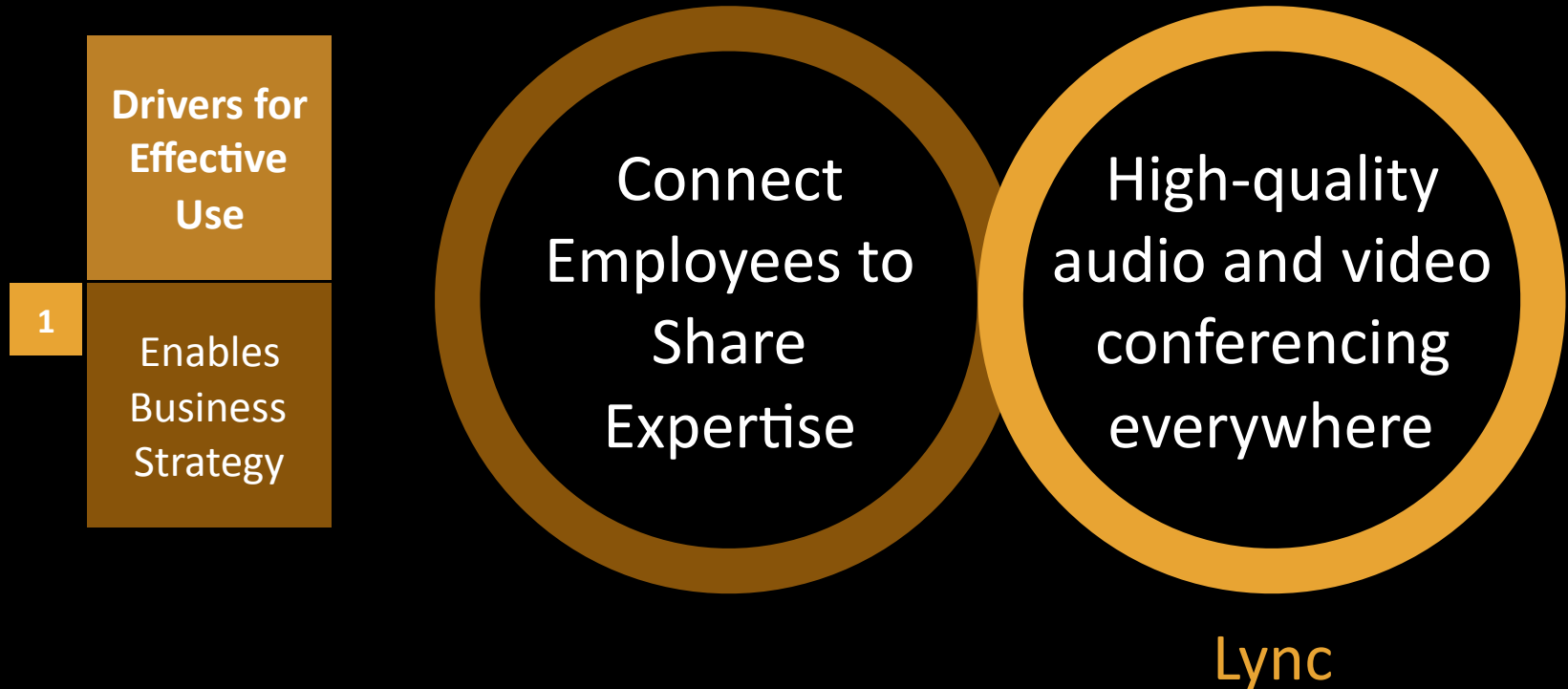
Case Example: Agricultural Firm



Case Example: Financial Services



Case Example: Legal Firm



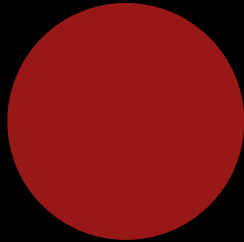
Conclusion

Drivers for
Effective
Use

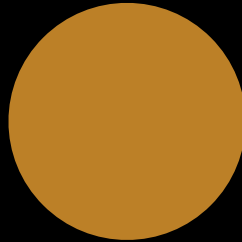
1

Enables
Business
Strategy

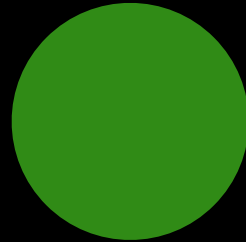
- If the use of Office 365 capabilities can be authentically linked with business strategy, you have a strong driver.



No
Linkage



Indirect
Linkage



Direct
Linkage

Core to a Business Process



A Process Relies On It

Drivers for
Effective
Use

2

Core to a
Business
Process

- The use of Office 365 is core to a process
- The process can't be done without the tool

Case Example: Retail Firm



Case Example: Legal Firm



Case Example: Legal Firm

Drivers for
Effective
Use

2

Core to a
Business
Process

The screenshot shows a SharePoint 'Issues' list. The left sidebar contains navigation links: Home, Notebook, Documents, Recent, **Issues** (selected), Site Contents, and Recycle Bin. The main content area has a blue header with a logo and the title 'Issues'. Below the header, there's a '+ new item or edit this list' link and an 'All Items' view selector. A search bar is present. The list contains two items, each with a checkmark icon. The columns are: Issue, Building, Urgency, Assigned To, and Status.

Issue	Building	Urgency	Assigned To	Status
Tap is leaking in men's bathroom ⚠	... Head Office	Next Day		New
Phone system is not allowing external calls ⚠	... Auckland Office	Business Critical		New

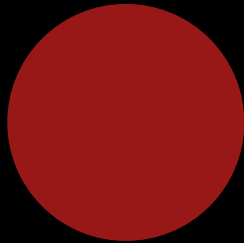
Conclusion

Drivers for
Effective
Use

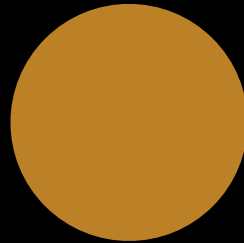
2

Core to a
Business
Process

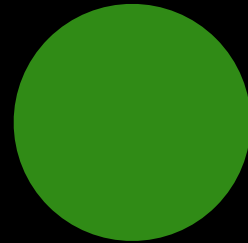
- If the use of Office 365 capabilities can be authentically integrated with business processes, you have a strong driver.



Usage is
Optional



Some
Integration



Core to
Process

A man in a dark suit and patterned tie is pointing his right index finger directly at the camera. He has a serious, intense expression on his face. The background shows an office interior with large windows and a grid ceiling.

Drivers for
Effective
Use

3

Executive Mandate

An Executive Champions or Mandates It

Drivers for
Effective
Use

3

Executive
Mandate

- The framework of words:
 - “Use this tool ...”
 - “Do it this way ...”
 - “Here’s the reasoning ...”

An Executive Champions or Mandates It

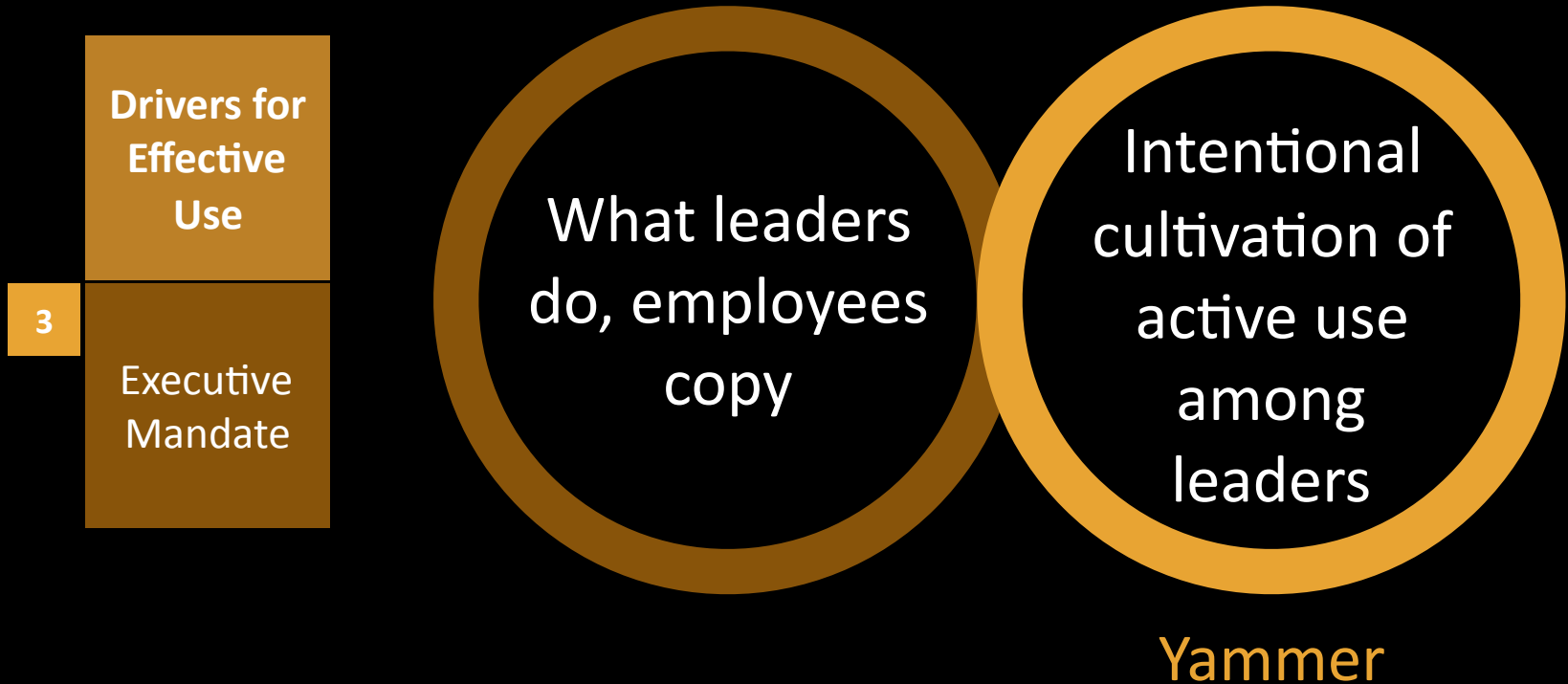
Drivers for
Effective
Use

3

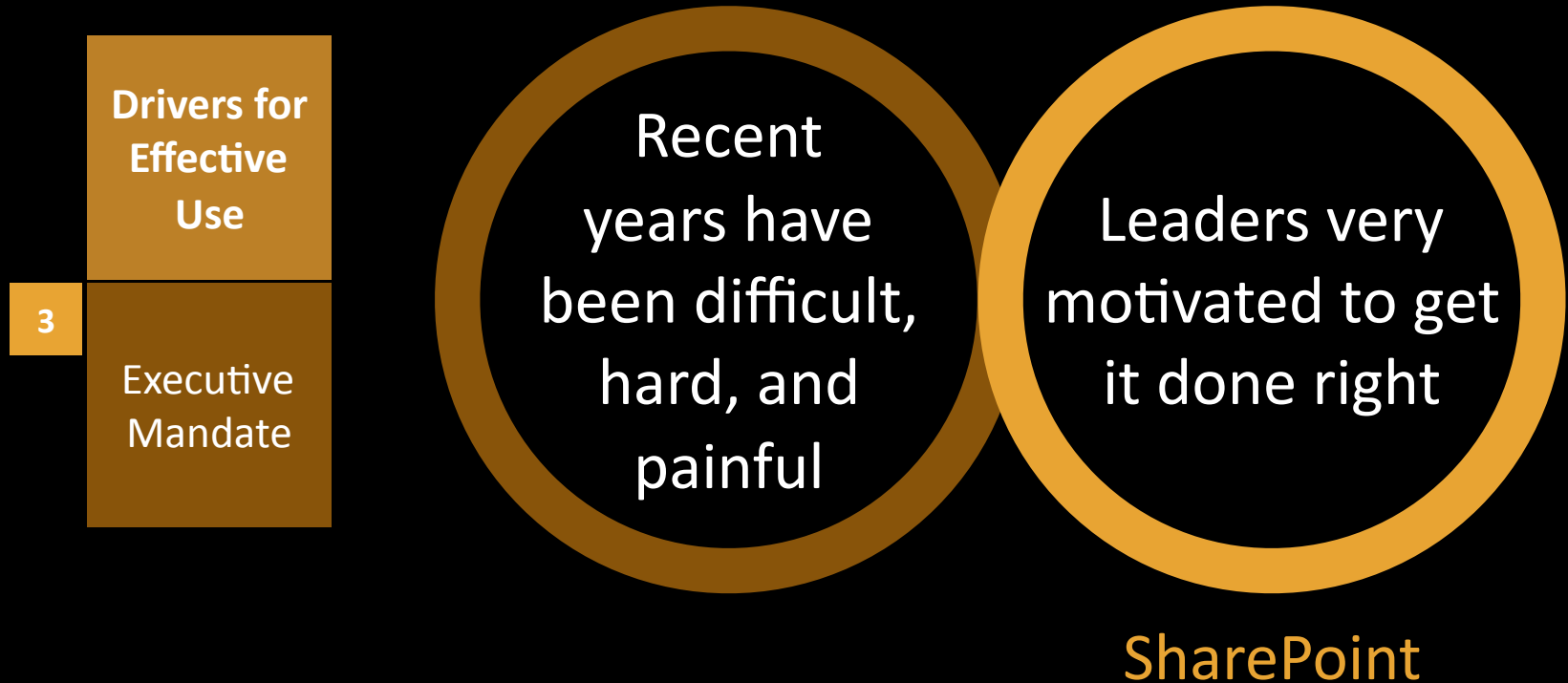
Executive
Mandate

- The evidence of aligned action:
 - He/she uses the tool in the prescribed way
 - Walks the talk, sets an example

Case Example: Professional Services Firm



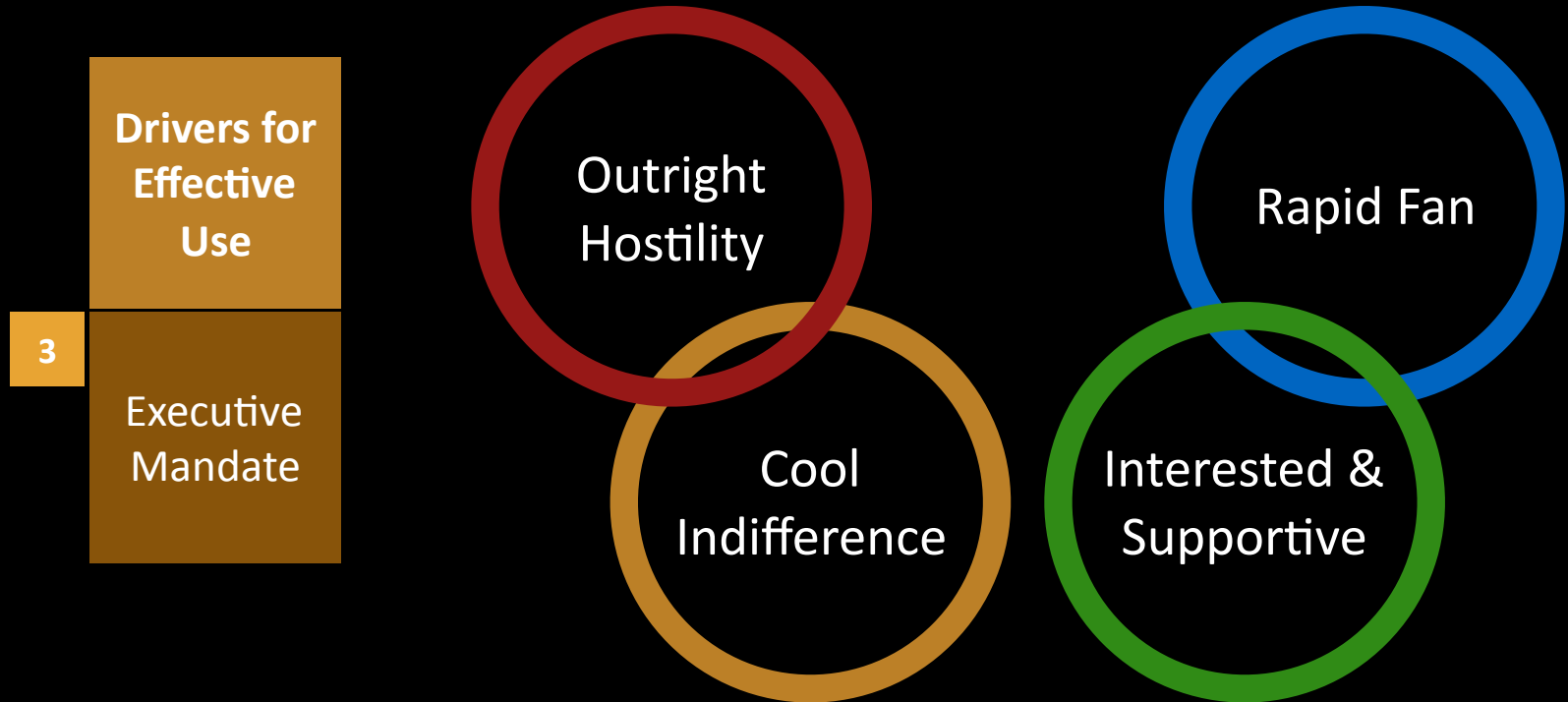
Case Example: Agricultural Firm



Case Example: Manufacturing Firm



Many shades of executive support



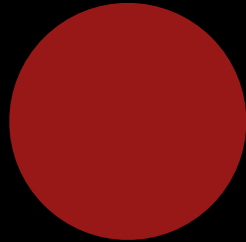
Conclusion

- If the use of Office 365 capabilities are mandated by respected executives, you have a strong driver.

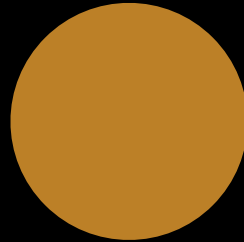
Drivers for
Effective
Use

3

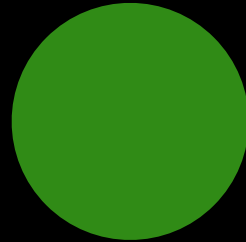
Executive
Mandate



No
Mandate



Mandate
by Words



Mandate
by Action



Drivers for
Effective
Use

4

Consultancy Process

Another Pair of Eyes

Drivers for
Effective
Use

4

Consultancy
Process

- Job task analysis to determine what tools and approaches would help
 - For individuals
 - For groups, teams, departments
- Requires the right person (or people)
 - Can see opportunities for improvement
 - Knows what is possible

Variety of Engagement Strategies

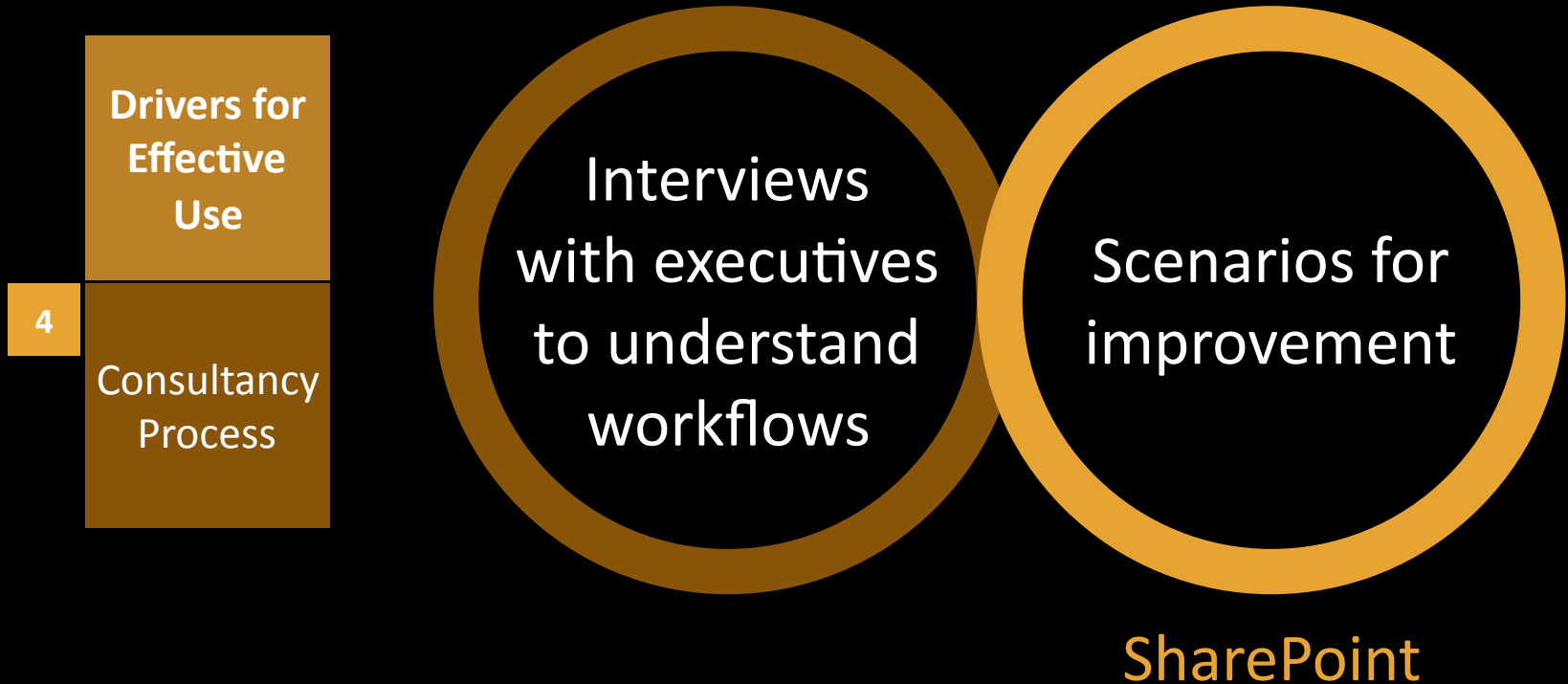
Drivers for
Effective
Use

4

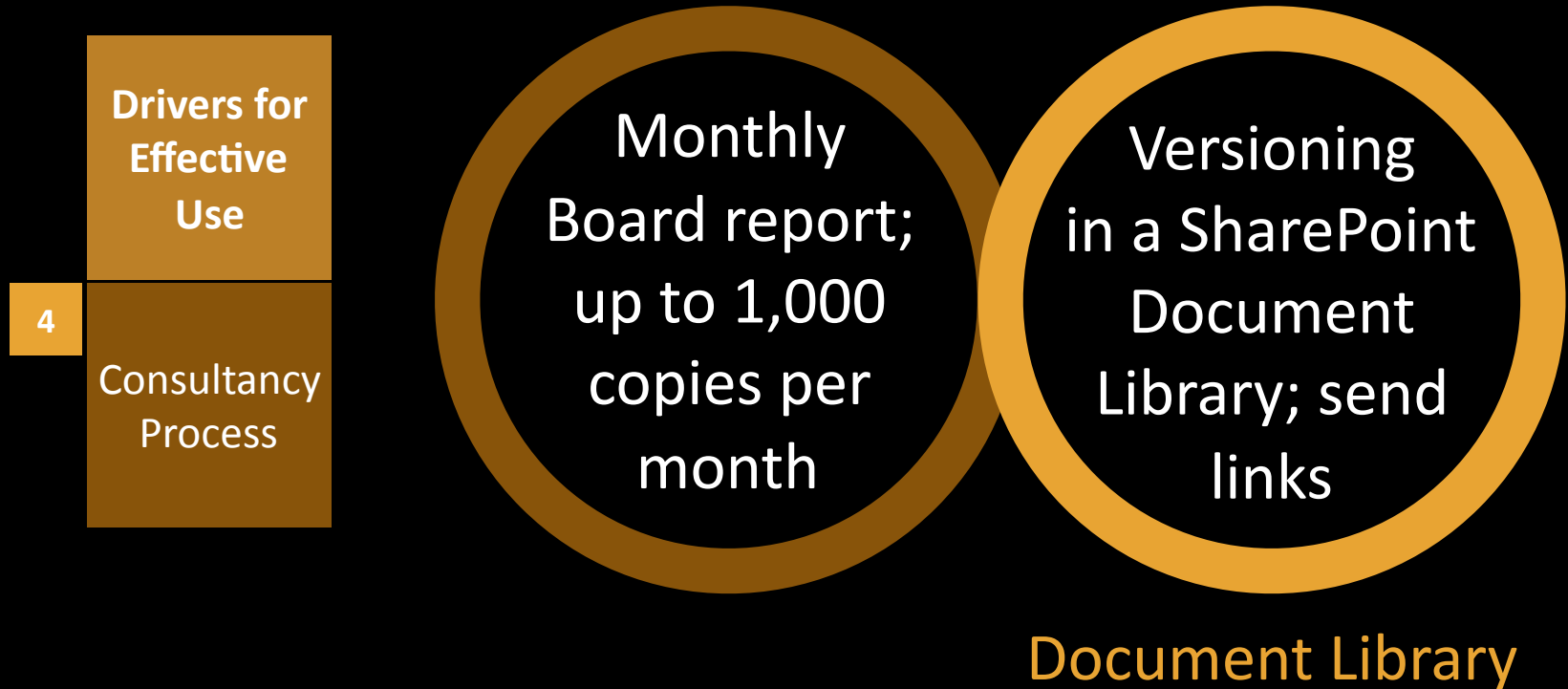
Consultancy
Process

- Interviews
- Workshops
- Proof-of-concept examples
- Pilot projects
- Internal surveys

Case Example: Accountancy Firm



Case Example: Agricultural Firm



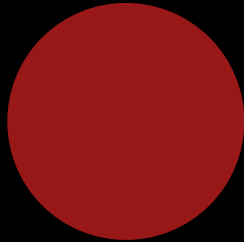
Conclusion

Drivers for
Effective
Use

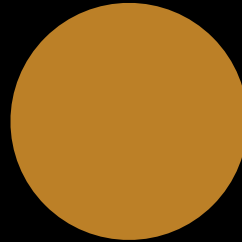
4

Consultancy
Process

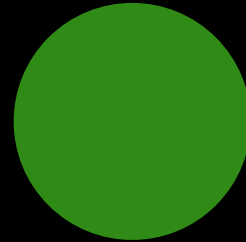
- If job task analysis can identify authentic ways of leveraging Office 365 capabilities, you have a strong driver.



No Authentic
Opportunities



Some
Opportunities



Many Authentic
Opportunities

Drivers for
Effective
Use

5

Self-Identified Opportunity



Some People Already Know What's Possible

Drivers for
Effective
Use

5

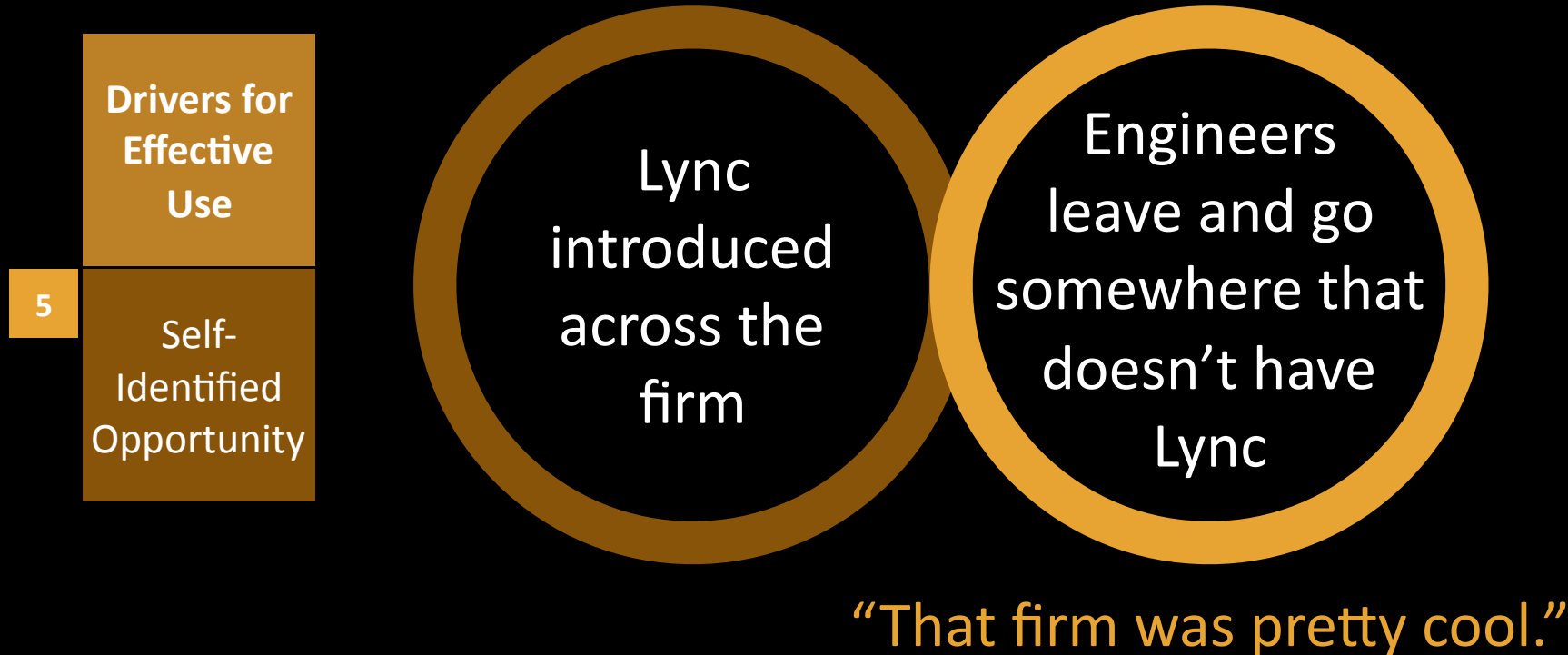
Self-
Identified
Opportunity

- Previous experience at another firm or another department within the firm
- Self-study on own time to further their education
- Exposure to new possibilities at conferences or during civic duties (PTA)

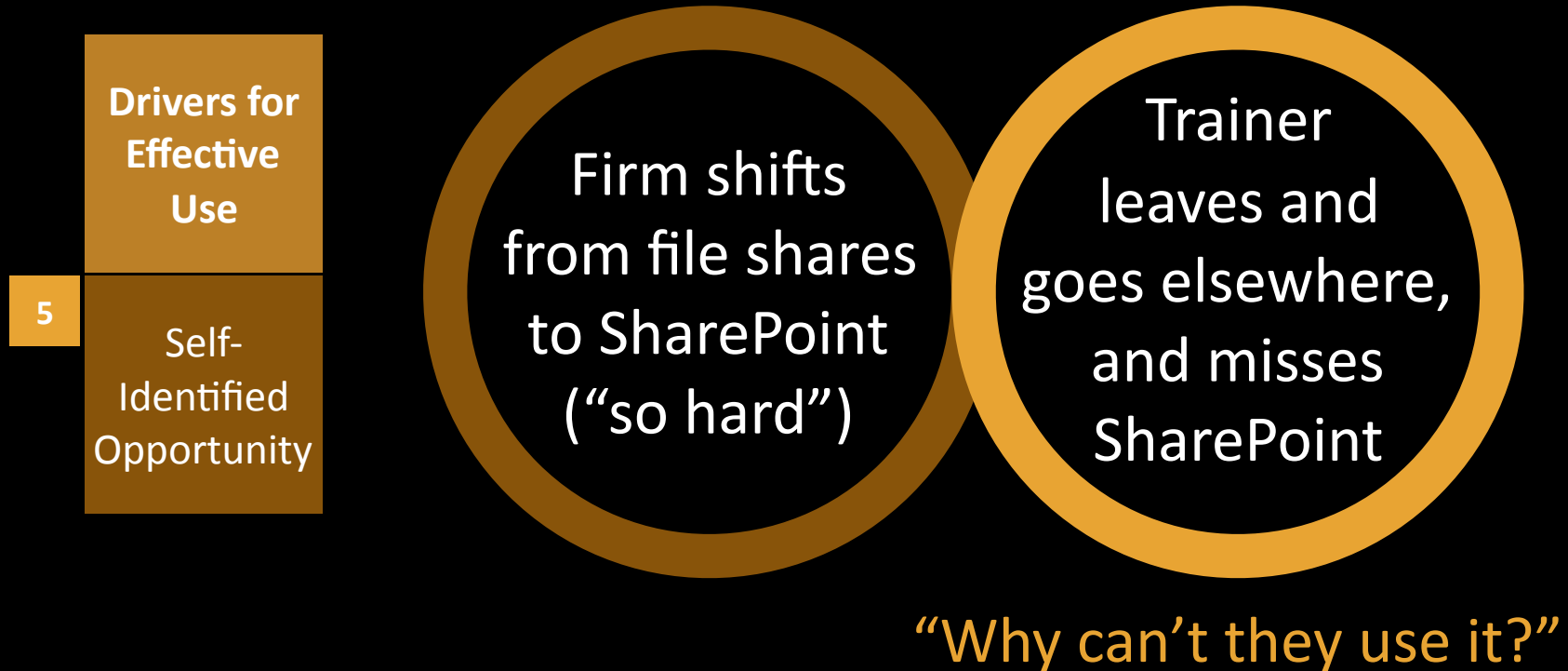
Case Example: University



Case Example: Engineering Firm

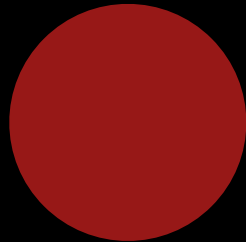


Case Example: Training Firm

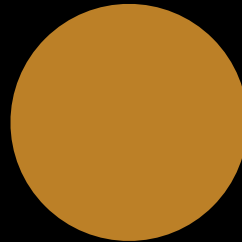


Conclusion

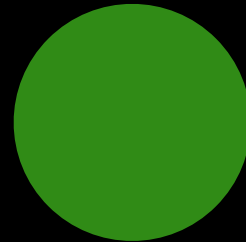
- If you have people who know what's possible, and their ideas would work for your firm, leverage their insights.



Low



Some



High

A woman with her hair in a bun, wearing a red blazer, is looking down at a laptop she is holding. She is standing in a modern office or public space with large windows in the background. Other people are visible in the background, but they are out of focus. The overall atmosphere is professional and focused.

Drivers for
Effective
Use

6

Specific Real-to-Life Scenarios

Descriptive ways of changing work activities

Drivers for
Effective
Use

6

Specific
Real-to-Life
Scenarios

- Combines:
 - Knowledge of a current way of working (process flow, challenges, pain points)
 - New possibilities through Office 365 capabilities
 - Better behaviours
- Results in a different way of achieving valued outcomes

Many possible scenarios

Drivers for
Effective
Use

6

Specific
Real-to-Life
Scenarios

- Look for the common activities that people do in your firm; how could these be improved by using Office 365?
- e.g., working on documents together, holding meetings, having discussions, running projects, sharing learning, etc.

Scenario: Co-Authoring Documents

Drivers for
Effective
Use

6

Specific
Real-to-Life
Scenarios

- Current reality:
 - Documents distributed by email
 - Proliferation of copies, multiple pain points
- New approach:
 - Check-in/check-out in SharePoint, or real-time co-authoring and co-editing using Word Online
 - Potential saving: 50% of time and effort

Case Example: Manufacturing Firm



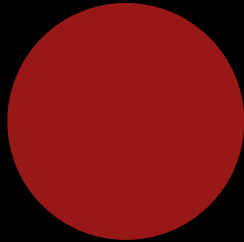
Conclusion

Drivers for
Effective
Use

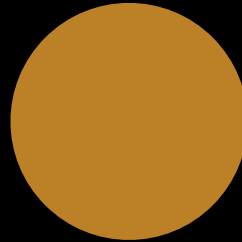
6

Specific
Real-to-Life
Scenarios

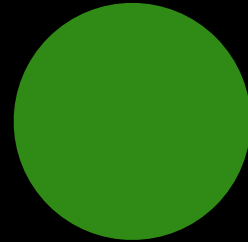
- Strong real-to-life scenarios help business groups/teams see the possibilities of Office 365 within their work reality.



Few



Some



Many

A diverse group of seven professionals standing together, representing various industries. From left to right: a man in a plaid shirt holding a yellow hard hat, an older man in a suit, a woman in a light green shirt, a woman in a white sleeveless top holding a pink rolled-up mat, a woman in a black top with a headset, a man in a white lab coat with a stethoscope, and a man in a red jumpsuit holding a wrench. They are all smiling and standing against a white background.

Drivers for
Effective
Use

7

In-Group Social Expectation

Social expectation of usage

Drivers for
Effective
Use

7

In-Group
Social
Expectation

- It's how a group works
 - ... the way we share updates / news / wins
 - ... the way we work on documents
 - ... the way we get stuff done
 - ... the way we talk to each other
- New people are inducted into the way of working together

Quietly Effective

Drivers for
Effective
Use

7

In-Group
Social
Expectation

- Manager:
 - “I don’t read email attachments. Put them in SharePoint.”
 - “If you want to talk to me, send a message in Skype for Business.”

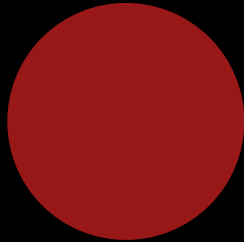
Conclusion

- When groups develop a strong culture of working in a particular way with Office 365, it becomes a strong driver.

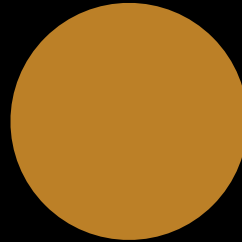
Drivers for
Effective
Use

7

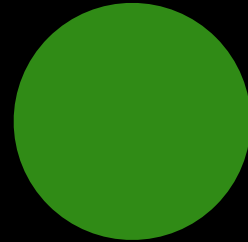
In-Group
Social
Expectation



Weak



Medium



Strong



Drivers for
Effective
Use

8

Self-Assessment Tool

General Recommendations by Job Type

Drivers for
Effective
Use

8

Self-
Assessment
Tool

- After analysing how work gets done across your firm, and looking for possible improvements, link new ways with job types
- Individual employees can review the recommendations and select the most relevant approaches

Example



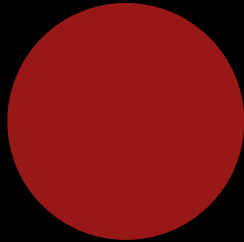
Conclusion

Drivers for
Effective
Use

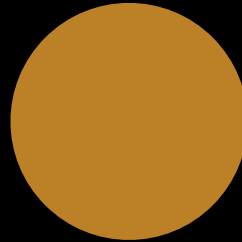
8

Self-
Assessment
Tool

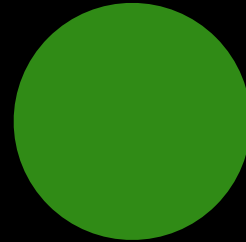
- If there are common job roles in your firm that can be linked to specific Office 365 capabilities, you have a strong driver.



Few
Common Roles

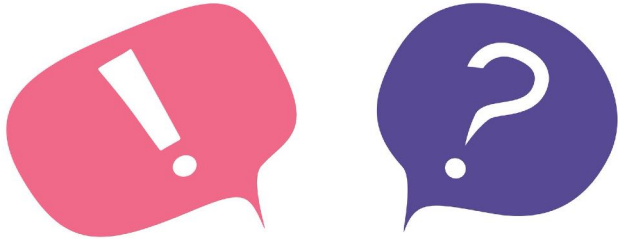


Some



Many
Common Roles

What are the drivers for
Office 365 in your work?





Developing Competence for Effective Use

Surrounding
Context

Drivers for
Effective
Use

Developing
Usage
Competence

Effective
Use

Extending
Effective
Use





Identity
& Access

User Name
Password
Web Address

Devices
Available

Computer
Tablet
Smartphone
Watch

Apps &
Data

Online
Offline

Skill &
Ability

Know What
Know Why
Know How
Willingness

**Developing
Usage
Competence**

Classroom
Training

One-to-One
Coaching

Self-Study
Materials

Group Study
Materials



Developing
Usage
Competence

1

Classroom Training

Many design variations

Developing
Usage
Competence

1

Classroom
Training

- Trainer (internal, external, mixture)
- Material (general, specific)
- Approach (listening, hands-on)
- People (peers, colleagues)
- Extent (starting, everything)
- Duration (hours, days, weeks)

Core Behaviours for Effectiveness

Developing
Usage
Competence

1

Classroom
Training

- Fresh and relevant material
- Hands-on activities
- Part of a larger process
- Fewer people better than many people

It's Critical to Get Various Things Right

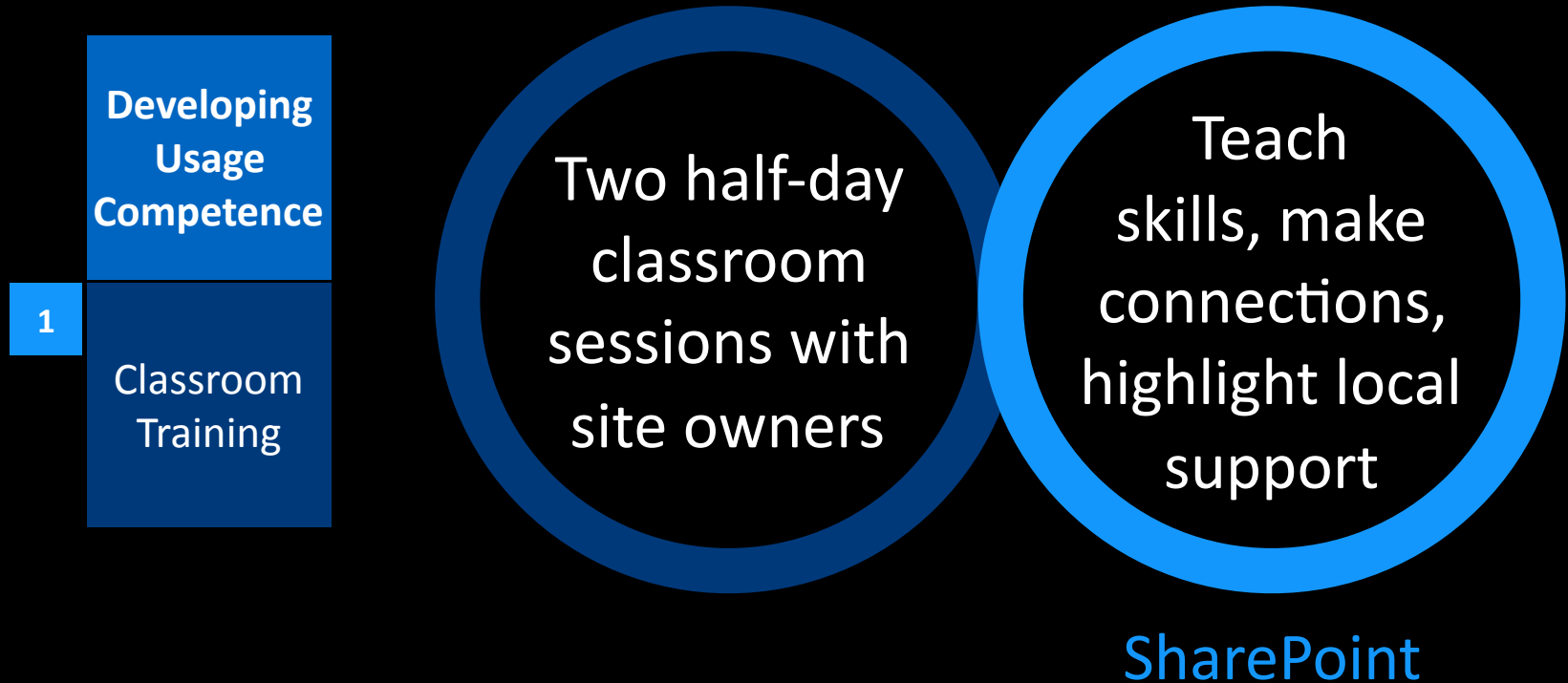
Developing
Usage
Competence

1

Classroom
Training

- The right trainer
- The right level
- The right group of people
- The right timing in the process
- e.g., **thought required.**

Case Example: Pharmaceuticals Firm



Conclusion

Developing
Usage
Competence

1

Classroom
Training

- Classroom training can be an effective method for developing competence, if done right.



Developing
Usage
Competence

2

One-to-One Coaching

Coaching People to Productivity

Developing
Usage
Competence

2

One-to-One
Coaching

- Working with one person in their normal work environment

Observe
what is
happening

Encourage
new
approaches

Sharing an
Idea

Seeking
Help

Sharing
Expertise

Coaching People to Productivity

Developing
Usage
Competence

2

One-to-One
Coaching

- A general-purpose strategy, but can particularly be used with:
 - Executives (time-pressed)
 - Blockers / negative people

Benefits for Coaches

Developing
Usage
Competence

2

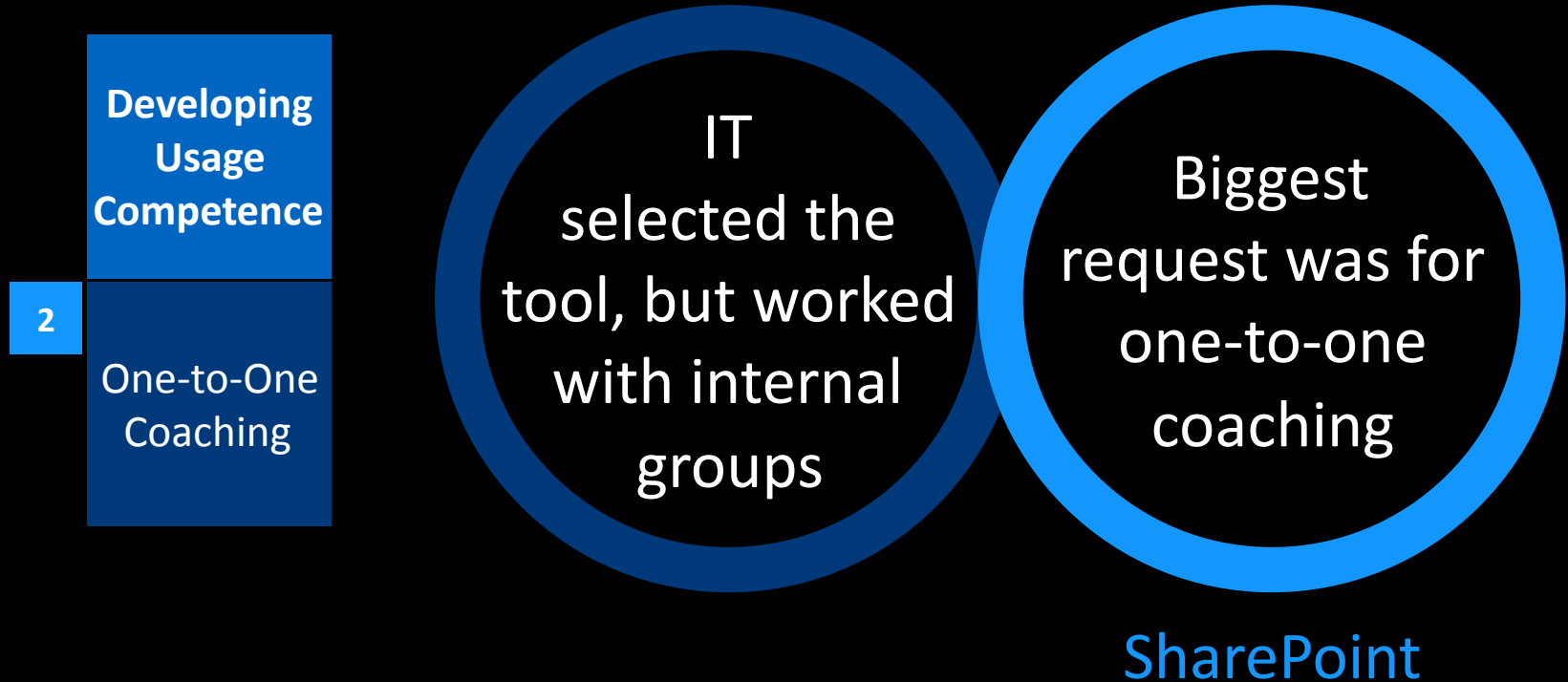
One-to-One
Coaching

- Sees what does and doesn't work in the “real world”
- Builds a network of contacts
- Reinforces and extends own expertise
- Gets early alerts to new possibilities

Case Example: Religious Organisation



Case Example: Research Firm



Variations on a Theme

Developing
Usage
Competence

2

One-to-One
Coaching

- Each one teach one (responsibility)
- One-to-two coaching (multiplication)
- Desk-to-desk (viral flow-through)

Conclusion

Developing
Usage
Competence

2

One-to-One
Coaching

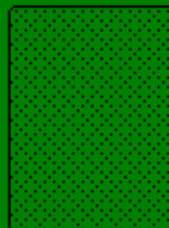
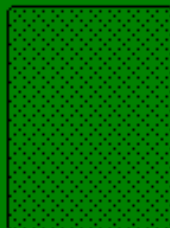
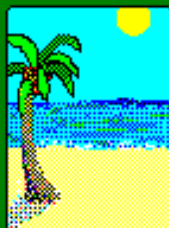
- One-to-one coaching can be an effective way of developing competence in Office 365 capabilities.

A person wearing a light-colored hat and glasses is looking upwards. Above them, a large number of white letters and symbols are falling like rain against a dark, textured background. Below the person, a vintage typewriter is visible on a desk, with a sheet of paper being typed on.

Developing
Usage
Competence

3

Self-Study Materials



Many Options Available

Developing
Usage
Competence

3

Self-Study
Materials

- Online video courses
 - lynda.com
 - sharepoint-videos.com
- Books, websites, and blogs
- Internal webinars

Many Options Available

Developing
Usage
Competence

3

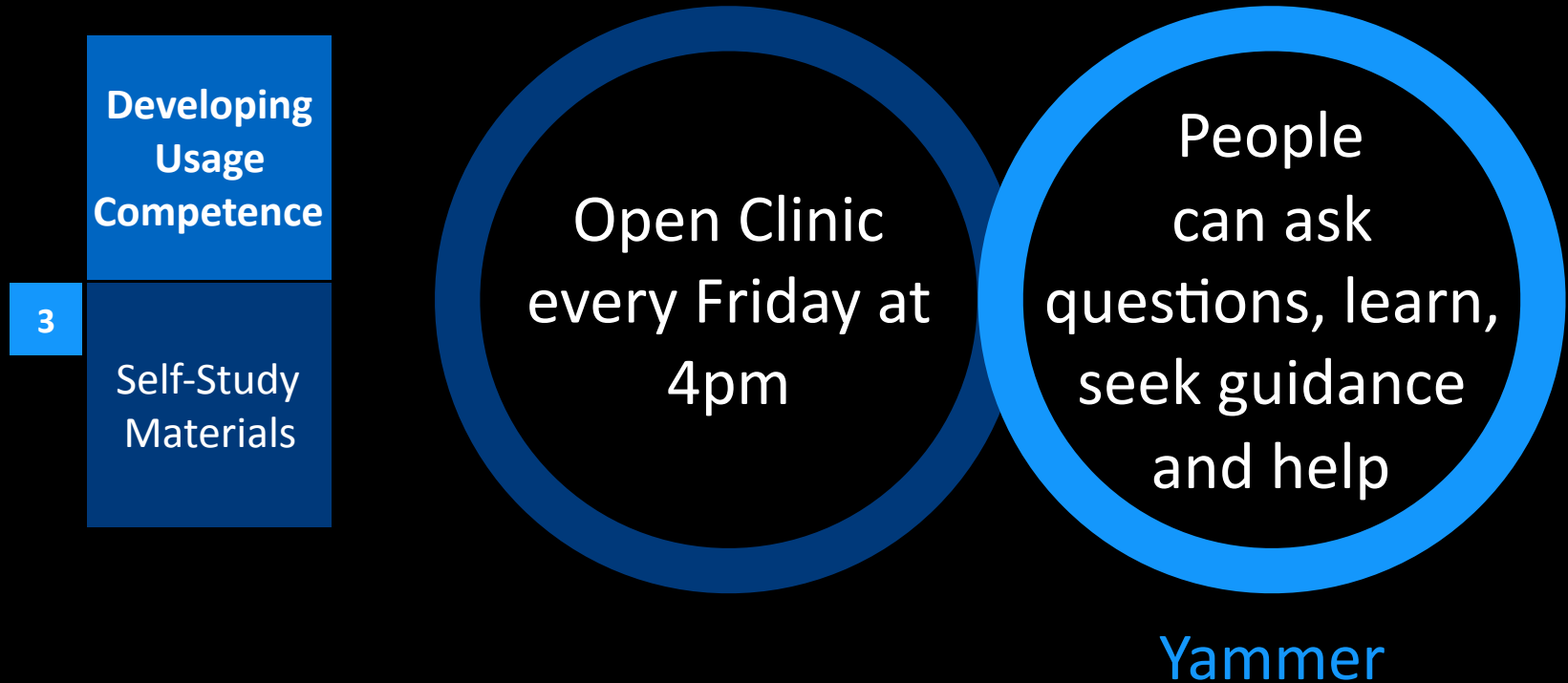
Self-Study
Materials

- Conference talks
 - Attend in person
 - Watch the video recording
- Develop your own internal materials
 - Written guide
 - Video tutorials
 - Benefit = specific context and user interface

Case Example: Consulting Firm



Case Example: Healthcare Firm



Conclusion

Developing
Usage
Competence

3

Self-Study
Materials

- There are various ways of using self-study materials to develop competence with Office 365 among employees.



Developing
Usage
Competence

4

Group Study Materials

Shared Knowledge on How to Work Together

Developing
Usage
Competence

4

Group Study
Materials

- Shared group experience with the tools
- Group agreement on how to use
- Group accountability for effective use

Various Group Study Materials

Developing
Usage
Competence

4

Group Study
Materials

- Books on core behaviours
- Videos on essential skills
- Discussion on applying new approaches within the context of the team/group
- Key aspect: Group Co-Learning

Case Example: Banking Firm



Conclusion

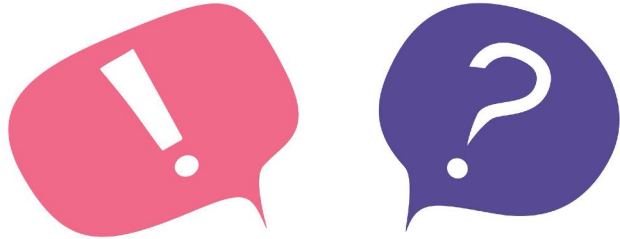
Developing
Usage
Competence

4

Group Study
Materials

- When groups learn together, they can strongly integrate new capabilities with group practices and behaviours.

What approaches have you embraced to develop competence in using Office 365?





Strategies for Cultivating Effective Use

Surrounding
Context

Drivers for
Effective
Use



Developing
Usage
Competence



Effective
Use



Extending
Effective
Use

Valued
Outcome

Productive
Behaviours

**Effective
Use**

Efficient
Process

The Best
Tool

**Effective
Use**

Core to
Work

Embedded
Champions

Community
Managers

One-to-One
Coaching

Remove
Alternatives

A photograph of a modern, multi-story building with a light-colored facade and large windows. The building has several balconies with dark railings. The scene is set outdoors with trees and a paved walkway in the foreground. The lighting suggests it might be dusk or dawn.

Effective
Use

1

Core to Work

The tools have to be used to do the work

1	Effective Use	Write a proposal	Use the template in SharePoint
	Core to Work	Seek feedback from colleagues and others	Ask in a Yammer community
		Create a new position, apply for leave	Fill out an online form on the intranet
		Hold your weekly team meeting	Schedule in Outlook, hold using Skype for Business

Get core data into the new tools

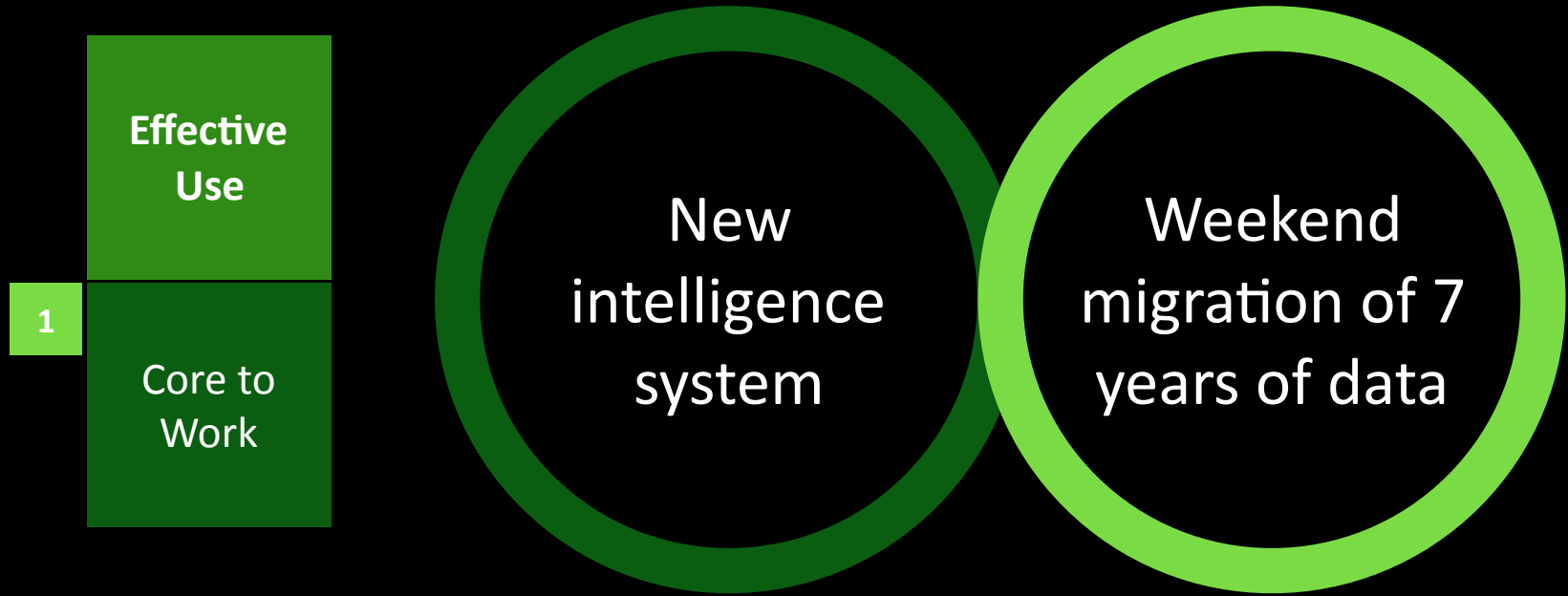
Effective
Use

1

Core to
Work

- Automated data migration
 - From file shares to OneDrive for Business
 - From file shares to Document Libraries
- “Bulk Loading Party”

Case Example: High Security Firm



Conclusion

- Making Office 365 capabilities core to work forces regular use.

Effective
Use

1

Core to
Work



Effective
Use

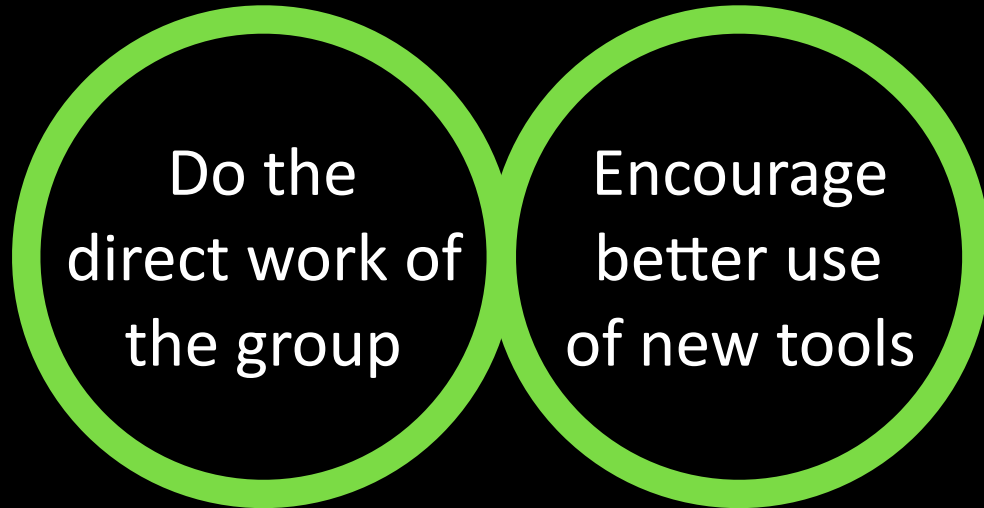
2

Embedded Champions

Nominated co-workers in a department



- Direct colleague



Trying to find the benefit

Credibility is important

Effective
Use

2

Embedded
Champions

- The more credibility with other colleagues the better
- Don't want "loose cannons."
- Need to be seen as a good / great contributor within the life of the team

Get extra insight, direction, and development

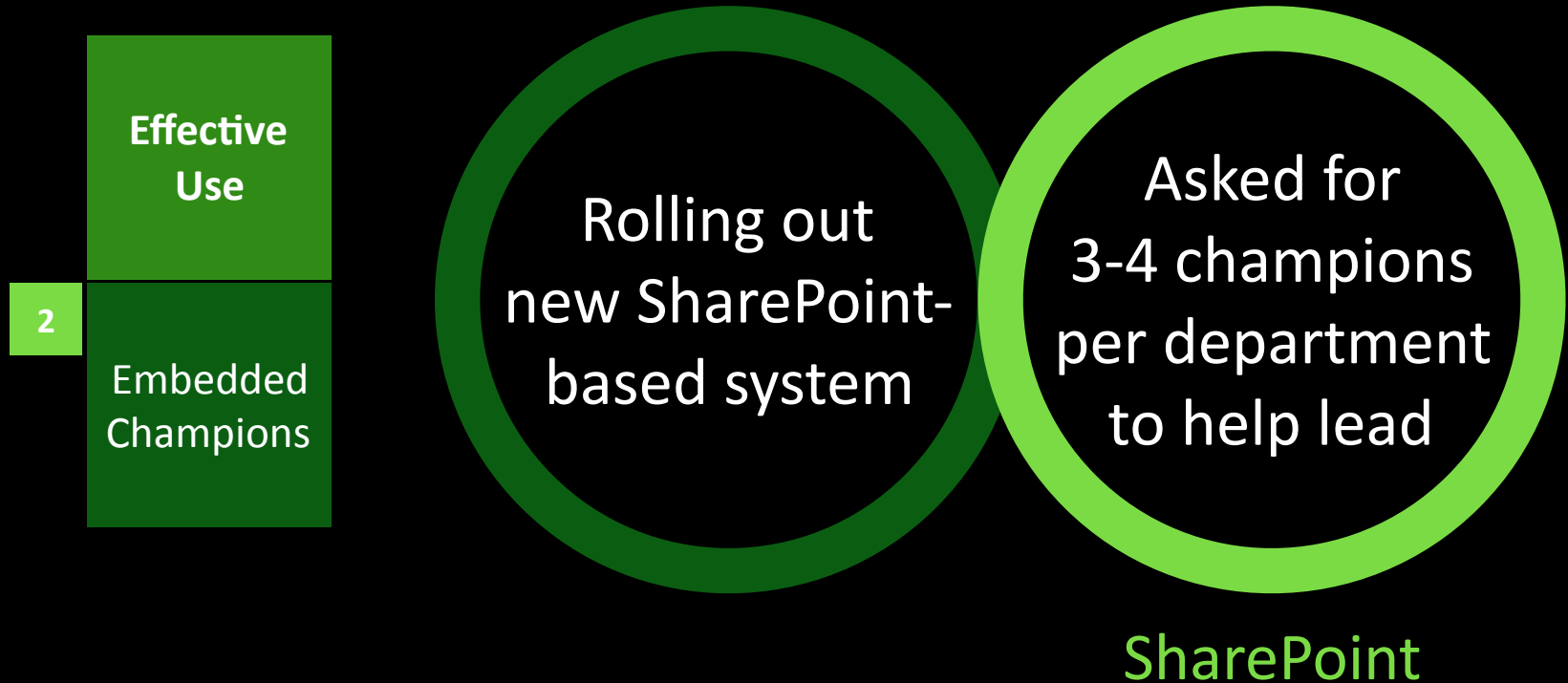
Effective
Use

2

Embedded
Champions

- Annual face-to-face training
- Monthly get togethers
- Online community to share ideas / experiences
- Funding to attend a relevant conference

Case Example: Agricultural Firm



Case Example: Engineering Firm



Conclusion

Effective
Use

2

Embedded
Champions

- Colleagues with credibility on getting work done can be an authentic voice for new ways of working with Office 365.



Effective
Use

3

Community Managers

Normally associated with “communities”

Effective
Use

3

Community
Managers

- Cross-firm communities of practice and interest
 - Executive Assistants
 - Alternative Fuels
 - OneNote Users
 - Project Managers

Employees with a specific cross-firm mandate



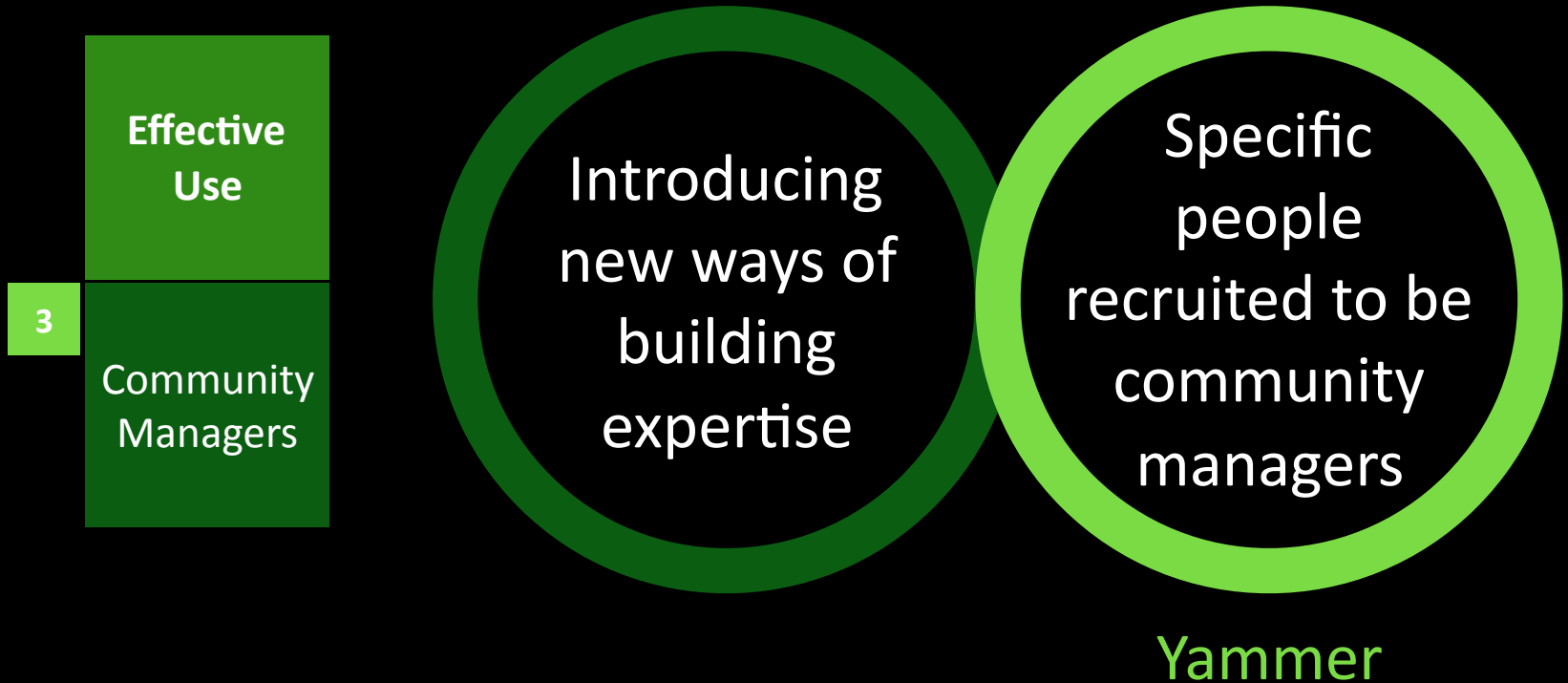
- Encourage effective use
- Working toward a specific outcome
 - Sharing expertise, Leveraging previous learning
 - Developing connections, Building relationships

Employees with a specific cross-firm mandate



- Have responsibility and accountability within the community
- Developing competence in others
- Often a specific job function OR a portion of someone's job
 - e.g., Engineering firm in the UK - 20% of time

Case Example: Professional Services Firm



Conclusion

Effective
Use

3

Community
Managers

- Community managers provide a focus for getting a business outcome while using Office 365 capabilities to get there.



Effective
Use

4

One-to-One Coaching

Directive coaching to effectiveness

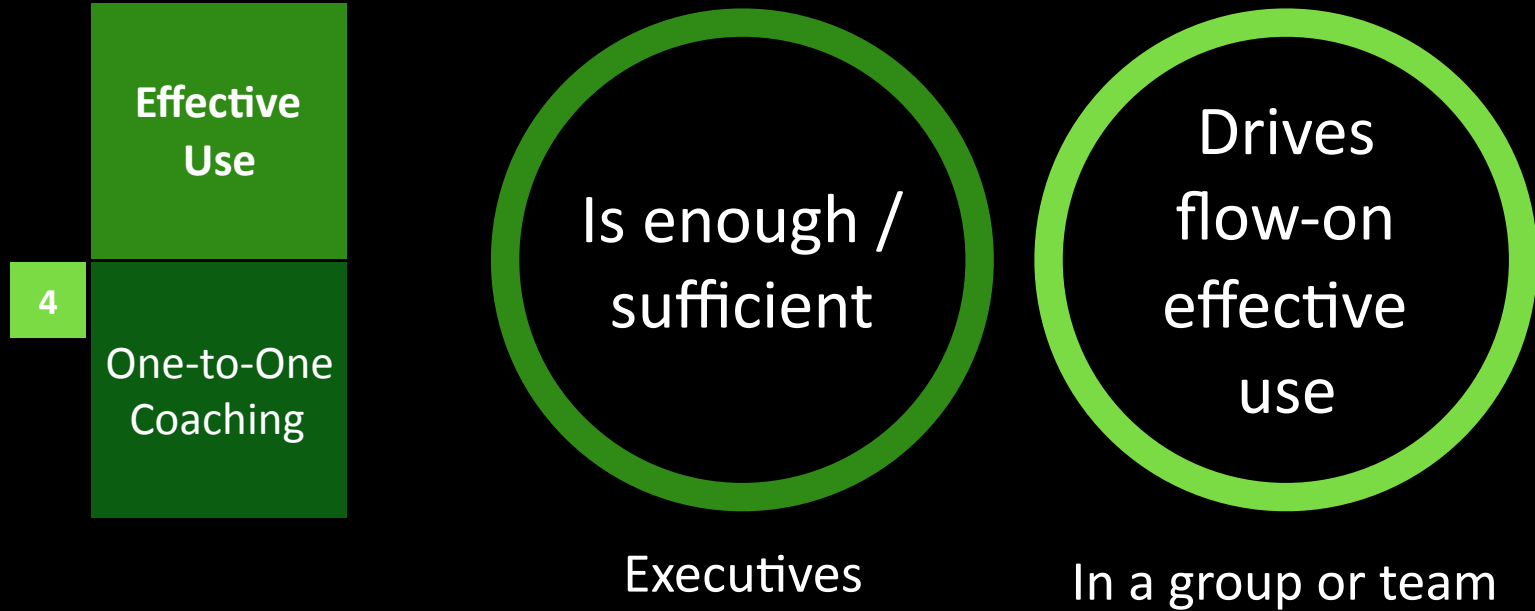
Effective
Use

4

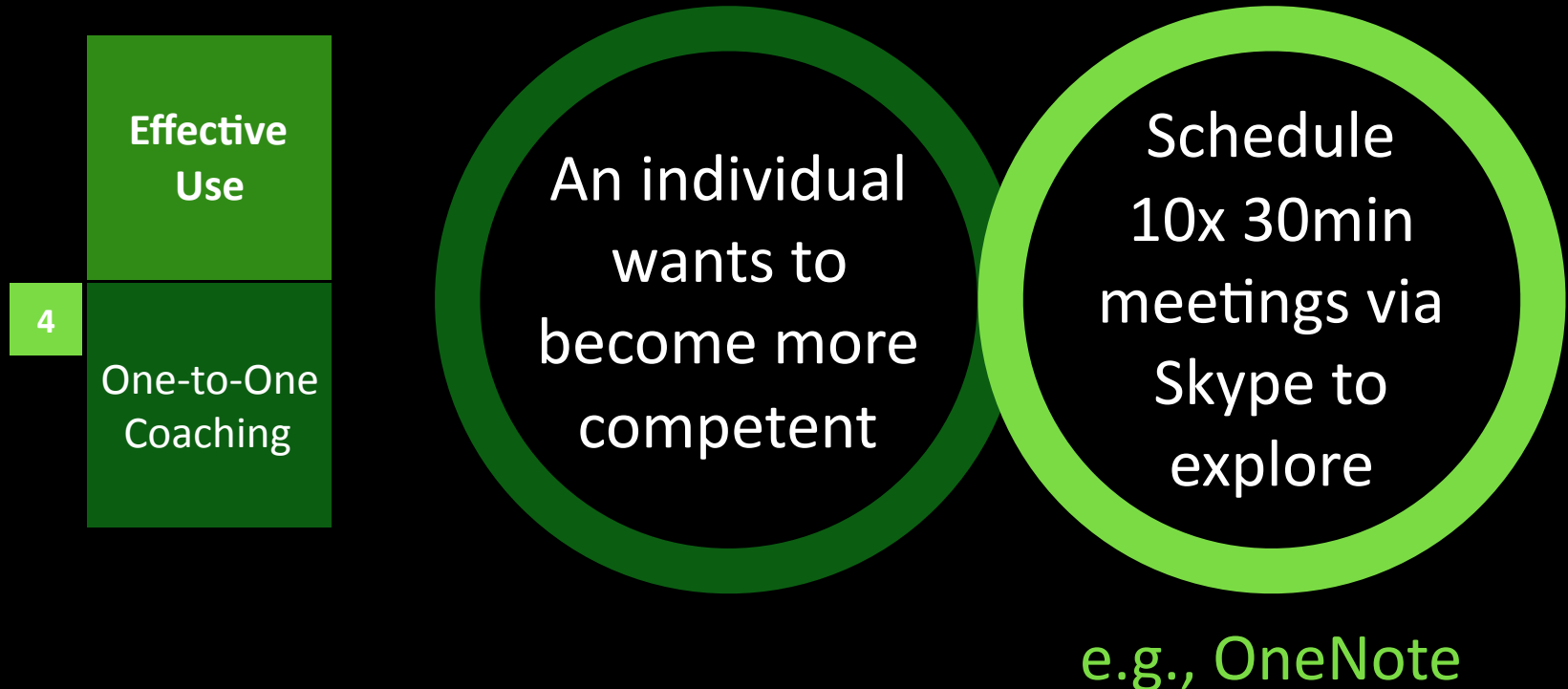
One-to-One
Coaching

- Working one-to-one to lead the individual to effective use
 - Structuring a OneNote notebook
 - Running online meetings in Skype for Business
 - Leading a group in Yammer
- Directed training and next steps

Getting them to effectiveness ...



Case Example: Manufacturing Firm



Conclusion

Effective
Use

4

One-to-One
Coaching

- One-to-one coaching helps lead people to effective use of new tools within the context of the work they have to do.



Effective
Use

Our Old Intranet
2005-2014

5

Remove Alternatives

Take away older, redundant, outdated systems

Effective
Use

5

Remove
Alternatives

- Previous systems are decommissioned
 - File shares ... read-only
 - Old intranet ... archived
 - Paper forms ... deleted (and not accepted)
- New social expectation of usage

Integrate the new system with other systems

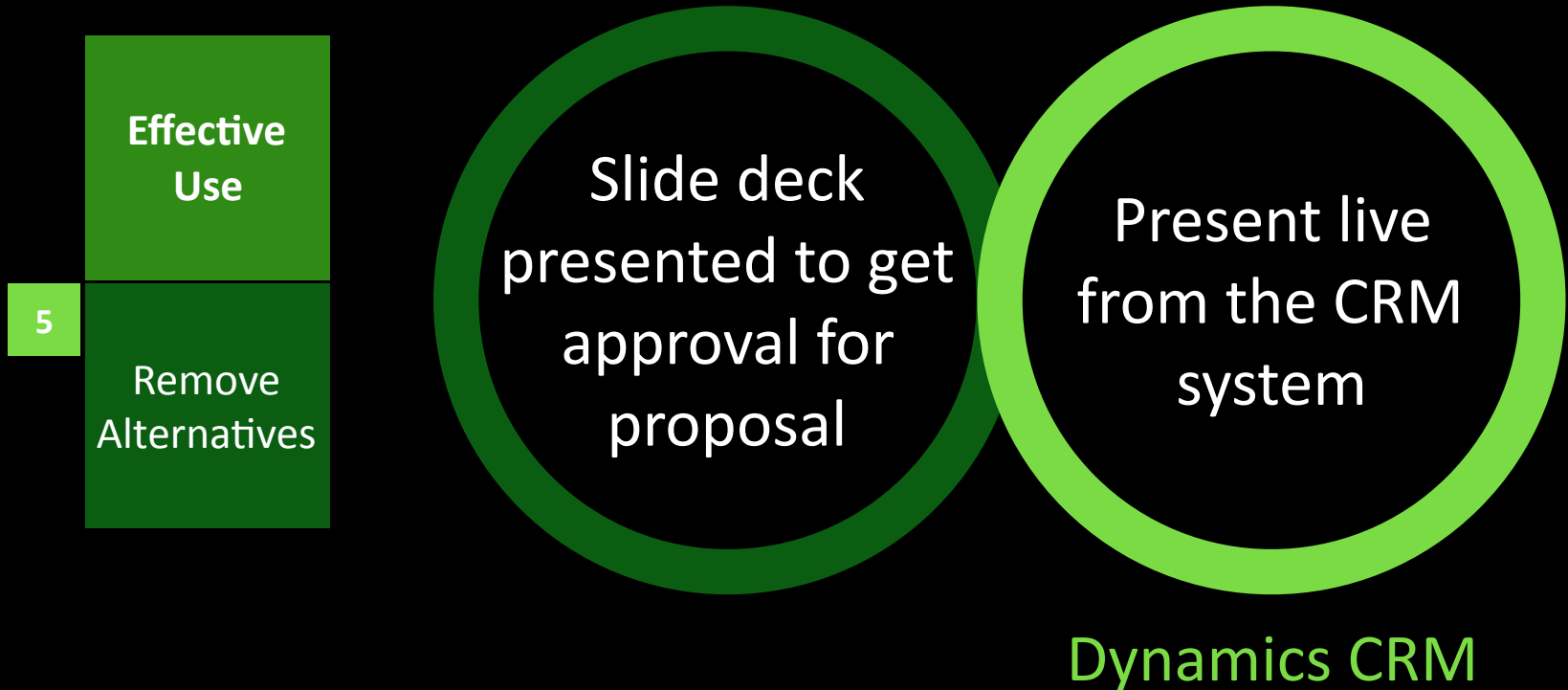
Effective
Use

5

Remove
Alternatives

- Interlinked dependencies
 - To do THAT you have to do THIS

Case Example: Sales Group



Conclusion

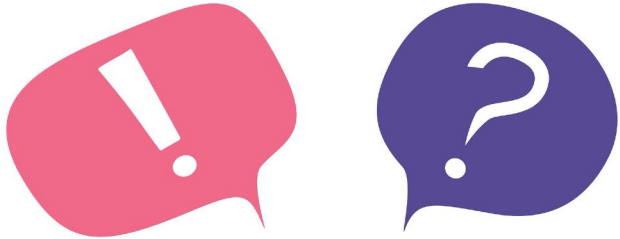
Effective
Use

5

Remove
Alternatives

- Providing multiple equally-valid approaches for getting things done only confuses people. Remove outdated alternatives.

How are you cultivating
effective use of Office 365?





Extending Effective Use

Surrounding
Context

Drivers for
Effective
Use



Developing
Usage
Competence



Effective
Use




Extending
Effective
Use


Dynamics to Balance

A green circle with a thick border, containing text.

Office
365 can
support many
activities

A red circle with a thick border, containing text.

Some
people have
no valid need
for more

A blue circle with a thick border, containing text.

It's worth
exploring the
"more"

**Extending
Effective
Use**

Exemplar
Stories

Internal
User Group

Train on
Core
Behaviours

Train on
Basic
IT Skills

Time and
Growing
Confidence

Measure
What
Matters

A person in a blue striped shirt is drawing on a wall covered in colorful splatters (pink, orange, yellow, green). The wall is also covered in various hand-drawn sketches, including a lightbulb, a cloud, a gear, a box, a smartphone, and a network diagram. The person's hand is visible, pointing at one of the sketches.

Extending
Effective
Use

1

Exemplar Stories

Internal Stories of Awesome Outcomes

Extending
Effective
Use

1

Exemplar
Stories

- An internal case study of how a group, team, or individual used Office 365 in a great way
- Your firm, your people, your challenges, your culture, your tools
- What happened?

Share the story across your firm ...

Extending
Effective
Use

1

Exemplar
Stories

- Brown-bag lunches
- Intranet news item or video interview
- Internal user group discussion
- Conference presentation

Case Example: Legal Firm



"I'm Betty from facilities ... "

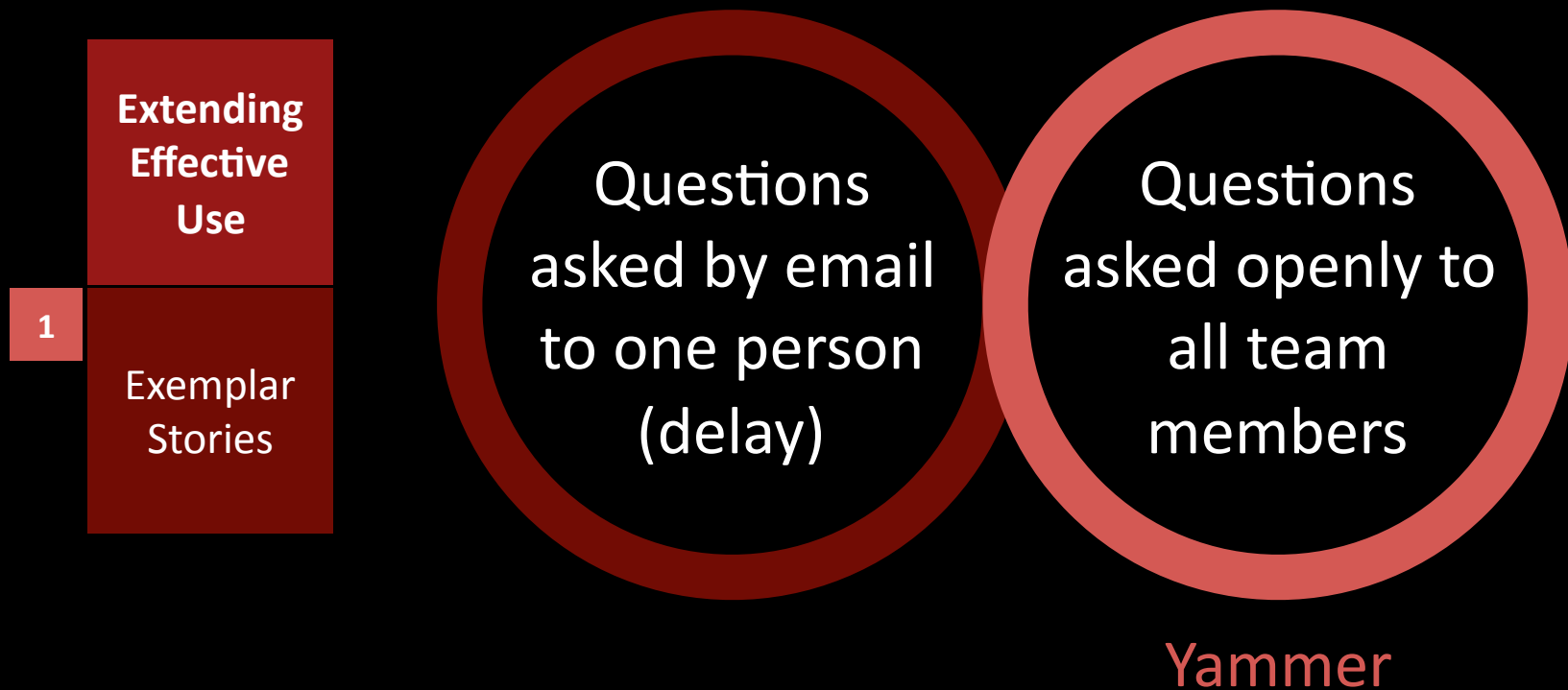
"Can I have one of those?"

SharePoint Custom List

Case Example: Retail Firm



Case Example: Retail Firm



Conclusion

Extending
Effective
Use

1

Exemplar
Stories

- Tell the great stories from your firm on the effective use of Office 365.
- **DISCUSSION QUESTION**
What's your favourite Exemplar Story?



Extending
Effective
Use

2

Internal User Group

Regular and ongoing exploration of use

Extending
Effective
Use

2

Internal
User Group

- What's working (**celebrate**)
- What's not (**get it fixed**)
- What could be done next (**envision**)
- What should be done next (**prioritise**)
- Who is doing good things (**kudos**)

Three main ways of running a user group

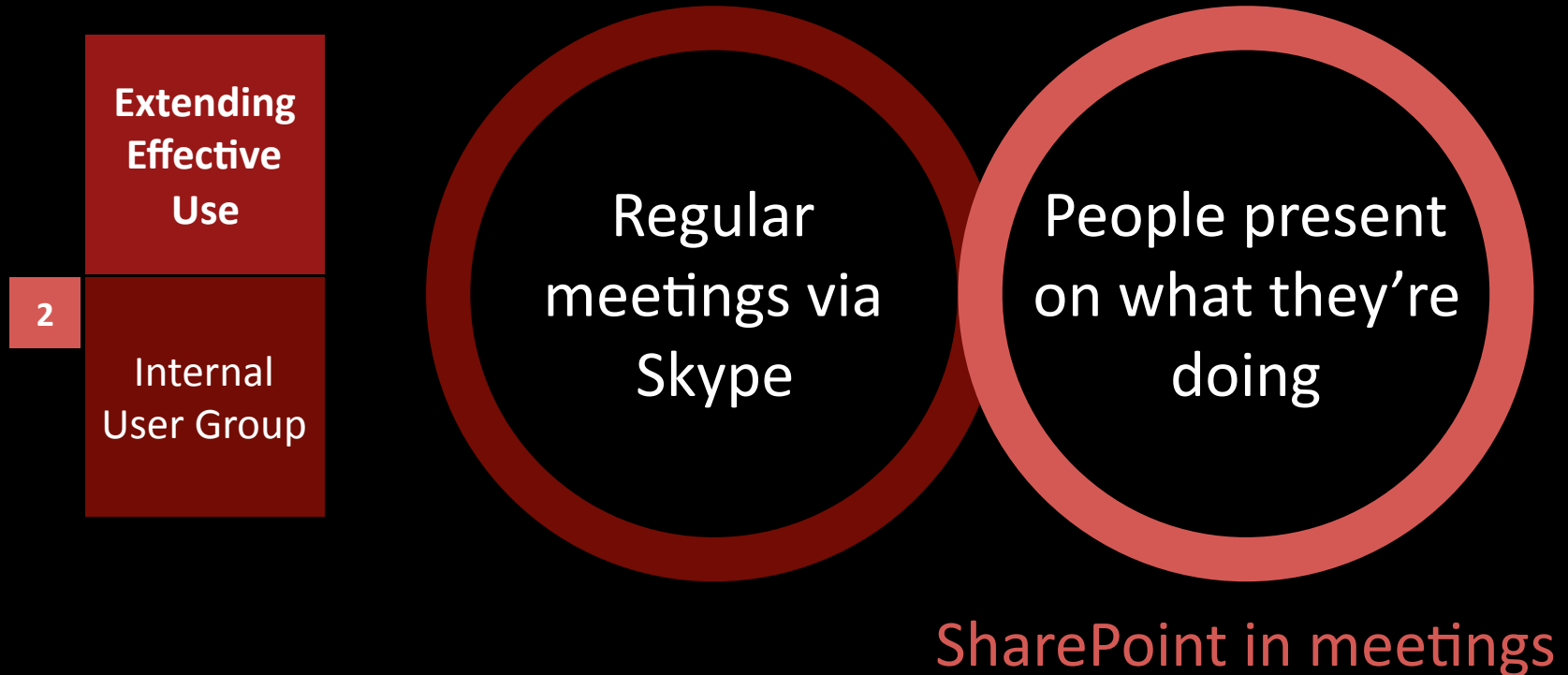
Extending
Effective
Use

2

Internal
User Group

1. Face-to-face sessions
 2. Broadcast sessions
(Skype for Business, Office 365 Video)
 3. Online community (Yammer, SharePoint)
- With all of these, you'll need a moderator

Case Example: Insurance Firm



Conclusion

Extending
Effective
Use

2

Internal
User Group

- An internal user group gives a structured context for extending effective use of Office 365.
- **DISCUSSION QUESTION**
What's your experience with an internal user group?

The background of the slide features a stack of old, worn books on a dark wooden surface. A white ceramic cup and saucer are positioned in the lower-left foreground. The background is a soft, out-of-focus blue bokeh.

Extending
Effective
Use

3

Train on Core Behaviours

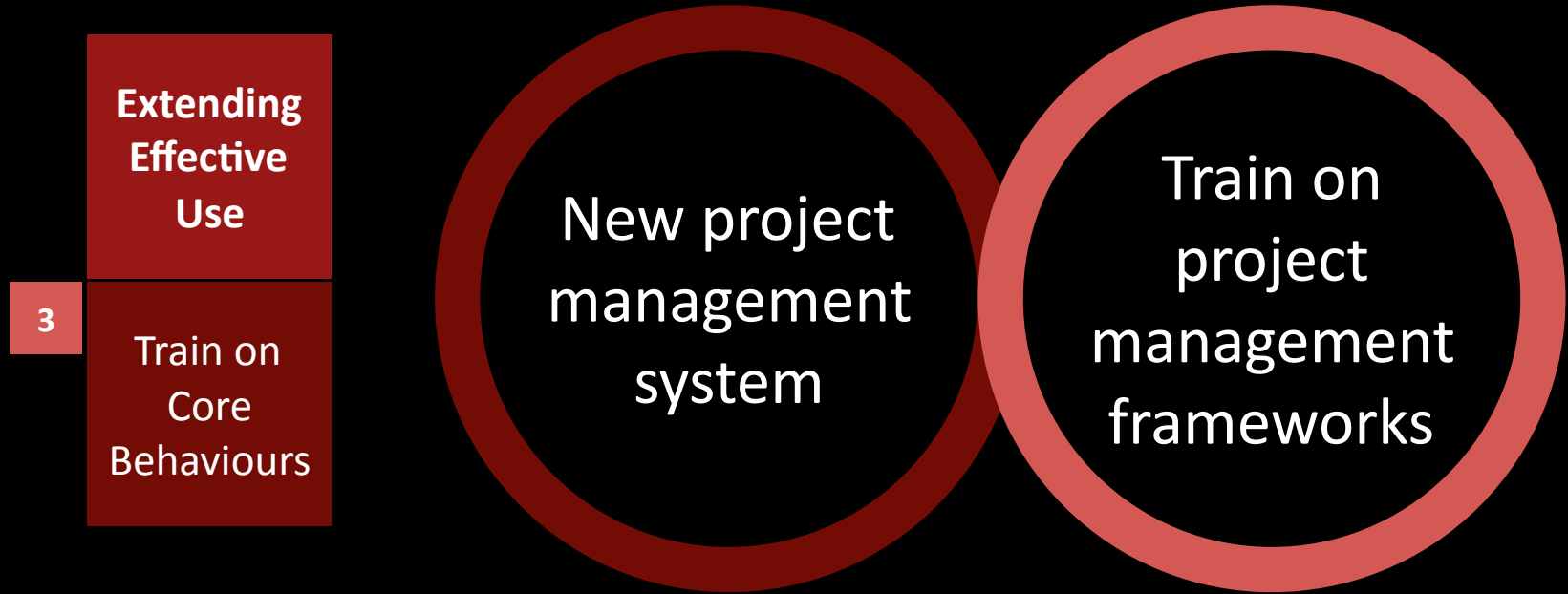
Train on the core human behaviours ...



Train on the core human behaviours ...



Case Example: Food Company



Conclusion

Extending
Effective
Use

3

Train on
Core
Behaviours

- When the capabilities of tools outstrip the capabilities of people to act/behave in the best way, tool usage is ineffective.
- **DISCUSSION QUESTION**
What core behaviours are lacking in your organisation?



Extending
Effective
Use

4

Train on Basic IT Skills

It's not 1989. The excuse "I'm not good with computers" is no longer acceptable.



... and yet ...



What is a Browser?

<https://www.youtube.com/watch?v=o4MwTvtYrUQ>

Lack of IT literacy will hold you back

Extending
Effective
Use

4

Train on
Basic
IT Skills

- Lack of confidence with computers
- Lack of confidence with new software
- Lack of confidence with when to use what
- Lack of confidence to express oneself in a professional manner in a digital forum
- Inability to type

If you can't live with it, deal with it

Extending Effective Use

4

Train on
Basic
IT Skills

- Internal training courses on basic IT skills
- Link up with local community college or training institution
- Make the demonstration of IT proficiency a prerequisite for promotions

If you can't live with it, deal with it

Extending
Effective
Use

4

Train on
Basic
IT Skills

- Refund courses at local IT institute once successfully completed
- One-to-one coaching
- Make IT proficiency a cornerstone of your corporate culture

Conclusion

Extending
Effective
Use

4

Train on
Basic
IT Skills

- A lack of basic IT skills will hamper your efforts to derive business value from using Office 365.

It's hard to do **more** if your people struggle to do **basic**.

- DISCUSSION QUESTION

How do you deal with lack of IT skills?



Extending
Effective
Use

5

Time and Growing Confidence

Progressive capability development

Extending
Effective
Use

5

Time and
Growing
Confidence

- Success breeds ...
 - Jealousy
 - Complacency
 - Willingness
 - Success mindset

For some people, early success leads to ...

Extending
Effective
Use

5

Time and
Growing
Confidence

- A desire to try more
- A drive to do more
- A willingness to push the boundaries
- An appetite to go faster

Conclusion

Extending
Effective
Use

5

Time and
Growing
Confidence

- Help your people get to success. Some will remain hungry and use their growing confidence to push for more.
- **DISCUSSION QUESTION**
Do you have people championing for more?



Extending
Effective
Use

6

Measure What Matters

Measuring via easy counts is misleading

Extending
Effective
Use

6

Measure
What
Matters

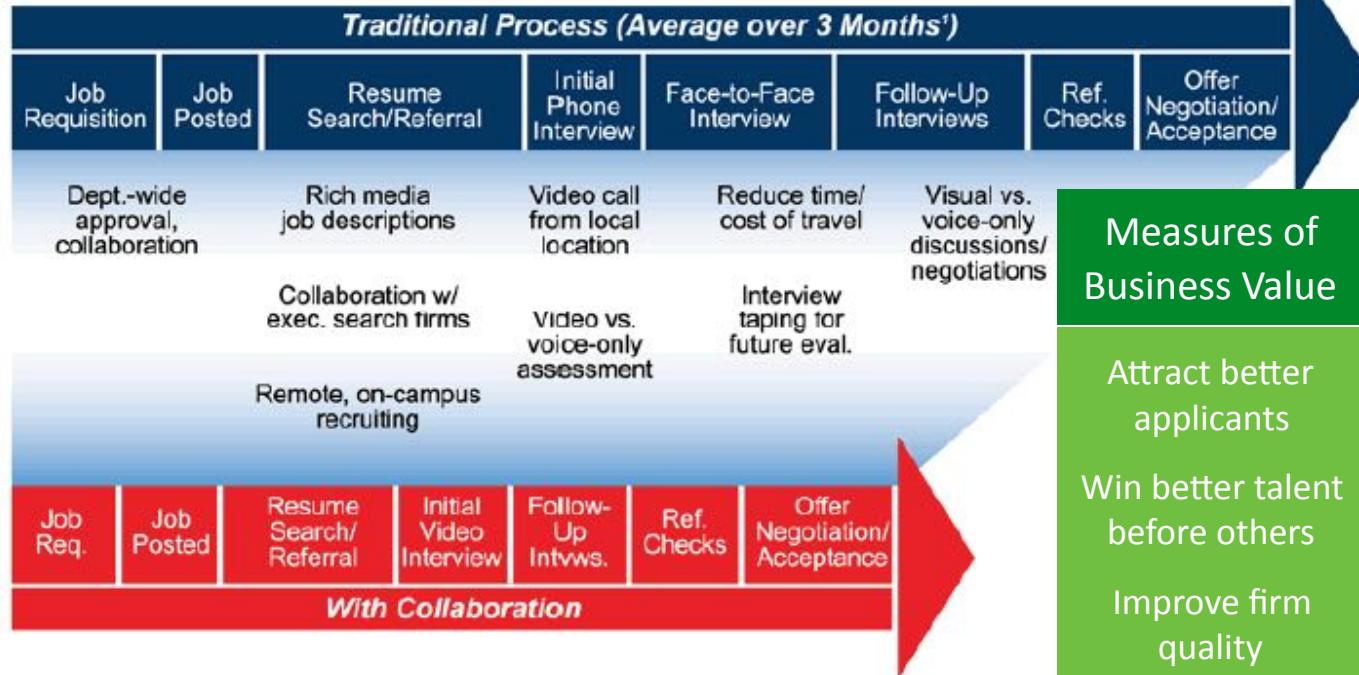
- The **number** of ...
 - SharePoint sites
 - Skype for Business meetings
 - Yammer communities
- High numbers do not equal high value (e.g., email, meetings)

Need good before/after numbers

Extending
Effective
Use

6

Measure
What
Matters

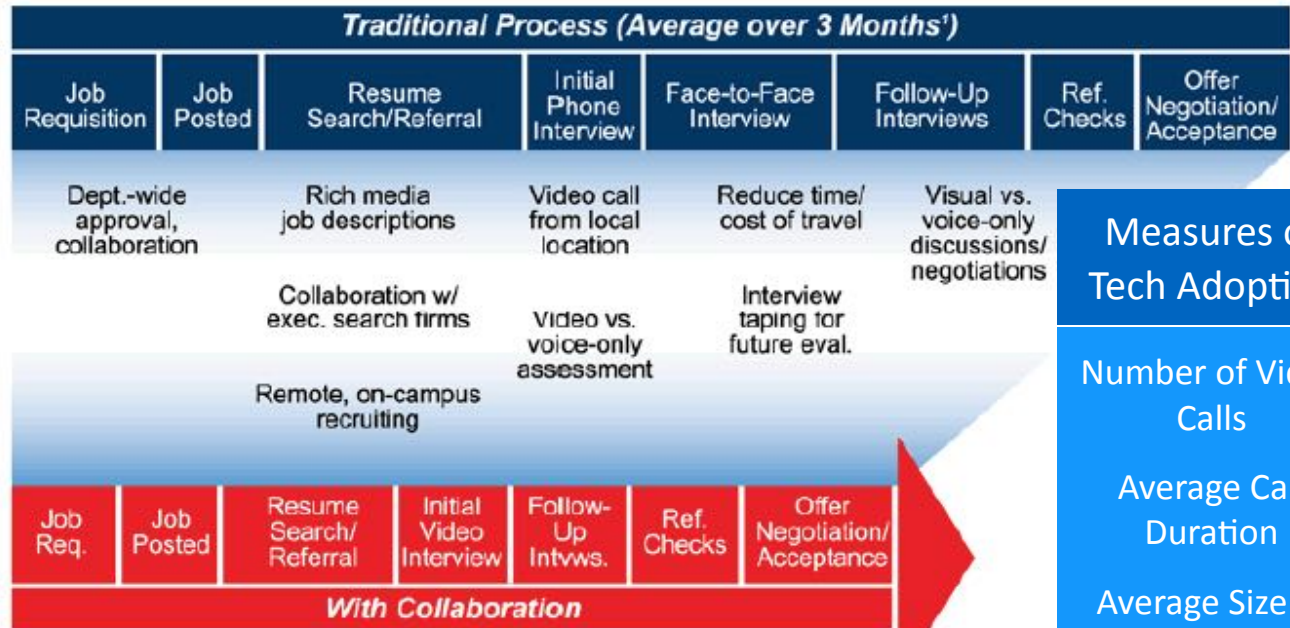


Need good before/after numbers

Extending
Effective
Use

6

Measure
What
Matters



Conclusion

Extending
Effective
Use

6

Measure
What
Matters

- Measuring what matters requires that you know what matters.
- DISCUSSION QUESTION
What do you measure? Does it matter?

How can you extend the
effective use of Office 365?





Building Your Framework

A stylized world map in dark blue and black, centered on the Atlantic Ocean, set against a lighter blue background.

Building
Your
Framework

1

SWOT Analysis on Effective Use

Review the Effective Use framework ...

Building Your Framework

1

SWOT Analysis on Effective Use

- What areas of Strength do you have?
 - ... Weakness?
 - ... Opportunity?
 - ... Threat?
- What actions do you need to take?

Surrounding
Context

Drivers for
Effective
Use



Developing
Usage
Competence



Effective
Use



Extending
Effective
Use

Surrounding
Context

Technology
Acquisition
Approach

Changing
Nature of
Work

Scenarios
of the
Possible

Governance
and
Guidelines

Business &
Financial
Case

Drivers for
Effective
Use

Enables
Business
Strategy

Core to a
Business
Process

Executive
Mandate

Consultancy
Process

Self-
Identified
Opportunity

Specific
Real-to-Life
Scenarios

In-Group
Social
Expectation

Self-
Assessment
Tool

Developing
Usage
Competence

Classroom
Training

One-to-One
Coaching

Self-Study
Materials

Group Study
Materials

Effective
Use

Core to
Work

Embedded
Champions

Community
Managers

One-to-One
Coaching

Remove
Alternatives

		Extending Effective Use
Exemplar Stories	Internal User Group	Train on Core Behaviours
Train on Basic IT Skills	Time and Growing Confidence	Measure What Matters



Building
Your
Framework

2

A 10 Step Action Plan

Review the Organisational Context

2

3

4

5

6

7

8

9

10

Strategy behind
the acquisition of
new tools

Feedback from
the Engagement
sessions

Type of staff, and
competence with
current tools

1

Build the Team for the Office 365 Program

3

4

5

6

7

8

9

10

Identify the right
internal (and
external) people

Run an effective
use workshop for
the new team



Who would benefit
from new ways of
working?

Who has a
willingness to be
involved now?



How do the
various groups
work now?

Where are the
opportunities for
improvement?



Initial list of
strategies for the
program

Prepare / shape
the required
resources



Work with the
initial groups

Apply relevant
strategies to help
with the transition



How does your
organisation
respond to the
strategies?

Modify or fine
tune so as to
maximise
effectiveness



Capture and
document good
ideas / approaches

E.g., capture
Exemplar Stories



Focus on value and
benefit from new
ways of working

Implement
relevant strategies

Monitor and adjust
to increase
effectiveness

1

2

3

4

5

6

7

8

9

Broaden the Footprint

Expand into new
departments,
groups, teams

Leverage core
strategies that
have already
worked



Building
Your
Framework

3

Build a Team for Effective Use

Project Team or Productivity Team

Building Your Framework

3

Build a
Team for
Effective
Use

- Coaching and mentoring
- Build internal capability
- Deliberately capture and share the stories of enhancement

A high-angle photograph of four business professionals (three men and one woman) gathered around a white table, looking down at documents and a laptop. The woman on the left has her hair in a bun and is wearing a dark pinstripe suit. The man next to her is wearing a dark blue blazer over a light blue shirt. The man on the right is wearing a bright blue button-down shirt. The fourth person, partially visible on the right, has brown hair and is wearing a dark suit. They appear to be in a collaborative meeting. A teal banner is overlaid on the image, containing text.

Building
Your
Framework

4

Write Out Your Plan

A written plan enables the building of intent

Building
Your
Framework

4

Write Out
Your Plan

- Coherent messaging
- Running theme
- Related to the work
- High frequency
- Formal approach

It gives you something to evaluate

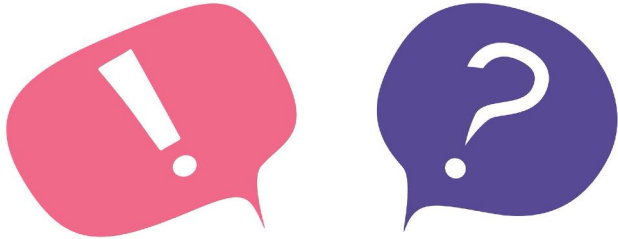
Building Your Framework

4

Write Out Your Plan

- An externalised document
 - Your evaluation (and thus improvement)
 - Share with others and discuss
 - Build a groundswell of support
 - Enables interaction with executives

What does your framework for the effective use of Office 365 look like?





Closing Comments

Thank you.

Getting to Effective Use with
Office 365 is the major game.

You're going to need a plan.

You can do this.

Go and do great work.

Consulting Services from Michael

I consult directly with firms to deliver clear business thinking on **achieving impact** from new approaches to work.

Consulting engagements leverage learning and experience from two decades of research and consulting projects, writing seven books, and presenting almost one hundred client workshops around the world.

The value I deliver to clients is facilitating impact from new approaches to work. Consulting service engagements on offer are:

- **Reviewing Current Health and Performance.** Are current approaches working? What needs to change if not? Get an independent health check.
- **Defining the Opportunity to Increase Impact.** What's the opportunity at your firm from new approaches to work? Get an outside perspective.
- **Planning the Journey to Success.** What behavioural competencies, cultural tenets, technical capabilities, and organisational constructs are required to underpin success? Get expert direction.
- **Developing an Adoption Strategy.** How do you drive transformation and achieve impact across your firm? Get leading practices that make sense for you.

Your Situation

What's the opportunity in your firm to achieve impact from new approaches to work? I'd love to hear your story and explore how I can help you by facilitating impact.

[Arrange a 30-minute no-obligation call with Michael.](#)

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