Change Management for the Enterprise

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Getting on Board with Office 365

Users are the key to realizing the full potential of your investments. A new tool or technology might meet all your technical requirements, but only when your users adopt and embrace it can your rollout really be a success. If you want to drive user adoption to its highest potential, you need an effective change management strategy that:

• Clearly articulates the behavior changes and expectations
• Encourages adoption from the top-down
• Builds a community among users
• Provides the right help and support at the right times
• Measures usage and adoption against stated goals
Some changes require more attention to change management than others. For example, adding new capabilities to a toolset already in use might require the minimum investment in awareness and training. But if you’re moving from one set of tools to an entirely new platform, a full change management approach is warranted – one that touches on each of the four phases shown below.

With this four-phased approach, you get more in-depth analysis, engage more agents, see greater adoption and get better results. This guide describes these change management phases in detail. You can use the customer-tested tips, resources, and samples provided to form an effective change management plan for Office 365.
It’s been proven time and again: When rolling out new tools or technology to users, a comprehensive change management plan and fully engaged executive sponsorship is critical to your success. Your organization will experience maximum reception and uptake if you complete the planning early on – at least four months in advance of general rollout. This first phase entails the following:

- **Engage executive sponsors.** Organizations that explicitly secure executive sponsors to actively communicate the value and benefit of Office 365 are more likely to be successful with their rollout.

- **Articulate the business case.** By developing clearly articulated business goals, you can focus on the most important user tasks and make sure everyone understands the benefits of the features you’re enabling.

- **Define behavioral changes.** Decide as an organization the behaviors you want to encourage in your employees. With a fundamental change in the technology employees have come to depend on for their daily work, this may mean that you will need to spell out specifically the activities you want people to start doing, stop doing, and continue doing.

- **Define success criteria.** Sharing concrete data that shows the positive changes brought about by rolling out Office 365 will encourage continued adoption and satisfy management by showcasing the return on investment.
Engage executive sponsors

Organizations with executives who actively communicate the value and benefit of Office 365 are more likely to be successful with their rollout. As you create your dedicated rollout and adoption team, be sure to secure an executive sponsor who will drive the "top-down" messaging and actively communicate the value and benefit of Office 365 throughout the rollout. For example, the executive sponsors should write and sign the awareness and rollout emails. They should also participate in awareness activities, such as Lunch & Learn sessions, the Launch Event, and so on.

Your executive sponsor plays a critical role during the awareness phase. By signing the rollout emails and embracing the overall messaging of the awareness campaign, the executive sponsor brings legitimacy to the rollout effort, emphasizes the benefits of the new software, and motivates users to start using Office 365.

Your executive sponsor is likely to be a much more enthusiastic supporter when the new features and value propositions are demonstrated first-hand. Consider including adoption team stakeholders, such as the Chief Information Officer or Chief Technology Officer.

Discuss these questions with your project team to help define your sponsors:

- Who is the executive sponsor funding this project and driving core messaging?
- Can you identify other executive sponsors and key influencers who can support the rollout?
Articulate the business case

By clearly articulating the business case for moving to Office 365, you can frame the rest of your change management initiatives within this context. Start by defining goals that will give you the greatest return on your investment and lower your operating costs. Once you’ve defined these goals, you can build your entire awareness campaign around inspiring users to practice these behaviors and to learn about the new tools that support them.

Discuss these questions with your project team to help define your business case:

- What are the core drivers behind your organization’s decision to deploy Office 365?
- What are your 3-5 goals to indicate a successful rollout and how will you measure?
- How big a change does Office 365 present for your organization and user communities?
- What are the expected benefits and pain points relative to this change?
- Do you have any current blockers or challenges that should be accounted for?
Define behavioral changes

After you've articulated the business case and goals for moving to Office 365, decide as an organization the behaviors you want to encourage in your employees. With a fundamental change in the technology employees have come to depend on for their daily work, this may mean that you will need to spell out specifically the activities you want people to start doing, stop doing, and continue doing. Create clear, concise statements that reflect these behaviors, like those shown in the table below. Use these examples, or customize and extend them for your situation.

Discuss these questions with your project team to help define the behavioral changes you want to encourage:

- What are the core drivers and goals behind your organization's decision to deploy Office 365?
- What behaviors will users need to adopt to support those goals?
- What will users need to start doing? Stop doing?
- Who are your core user groups and how will you organize around them (by role, by line of business, by subsidiary, by location, other)?
- How big a change does Office 365 present for your organization and user communities?
- What are the expected benefits and pain points relative to this change?
- Do you have any current blockers or challenges that should be accounted for?

It's important to determine the overall behavior you want to encourage because it will help you focus your awareness and training materials on the essential tasks your users will need to learn.
<table>
<thead>
<tr>
<th>Behavior</th>
<th>Start…</th>
<th>Stop…</th>
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</thead>
</table>
| Collaborate openly on teams and projects | • Start using a shared workspace for project files  
• Start communicating in shared forums to build history and onboard new members quickly | • Stop using email attachments to distribute files  
• Stop closing off communication by discussing projects in small groups and e-mail |
| Create and contribute to shared content | • Start storing content in a central location  
• Start using collaboration tools so all participants can contribute to drafts | • Stop storing content locally  
• Stop sending document revisions as email attachments |
| Run effective meetings          | • Start using online meetings for interactive meeting experiences  
• Start using the shared workspace as the sole location for meeting content | • Stop using pay-by-minute conferencing or booking unnecessary travel  
• Stop storing meeting content on my local computer |
| Maximize my productivity        | • Start using tasks to organize my day and presence to advertise availability  
• Start subscribing to information flows and using Search to connect to experts | • Stop relying on traditional work practices and manual tools  
• Stop wasting time trying to solve problems others have already solved |
| Share my identity and expertise | • Start actively maintaining my online profile to advertise my expertise  
• Start actively sharing my work and allowing people to follow me | • Stop sending personal updates through email  
• Stop storing data where it can’t be found or reached |
| Engage with community and build a knowledge base | • Start using social networks to interact with colleagues and keep informed of their activity  
• Start proactively sharing information and content in communities for reuse | • Stop using e-mail for discussions on topics of interest  
• Stop limiting my network to my physical geography |
Define success criteria

Coming up with a formal set of success criteria is critical for measuring the impact resulting from an Office 365 rollout. While some results will be seen and felt quickly, collecting a comprehensive and accurate representation of the gains from an Office 365 rollout requires planning. You’ll need to determine what should be measured, create the data collection surveys, and select the dates for distribution and collection of data.

Choose criteria that will demonstrate success to upper management. You might want to include measures such as user satisfaction, help desk traffic, reliability, and adoption velocity. Selecting too many criteria makes consistent and accurate tracking difficult. Select five to ten criteria and assign each one a specific measurement. To guide you, use the SMART mnemonic to make sure your criteria are:

- **S** = **Specific**: Clear and unambiguous; answers the questions, "What, why, who, and where?"
- **M** = **Measurable**: Concrete; clearly demonstrates progress.
- **A** = **Attainable**: Realistic; not extreme.
- **R** = **Relevant**: Matters to stakeholders.
- **T** = **Timely**: Grounded to a specific target date; answers the question, “When?”

Measuring the changes that occur as a result of rolling out Office 365 will provide a way to monetize savings in time and resources and capture qualitative gains in employee satisfaction.
## Examples of Success Criteria

<table>
<thead>
<tr>
<th>Success Criteria</th>
<th>Method/Source</th>
<th>Metrics</th>
<th>Example Goal</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Increased adoption:</strong></td>
<td>Quantitative:</td>
<td>• Mailbox usage</td>
<td>Comparison of pre- and post-rollout usage reports will show increasing adoption of 10% per month.</td>
</tr>
<tr>
<td>Increased usage correlates to user adoption of the technology.</td>
<td>• Office 365 reports</td>
<td>• SharePoint usage</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>• Lync IMs and conferences</td>
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<td></td>
<td></td>
<td>• Minutes of Lync audio used</td>
<td></td>
</tr>
<tr>
<td><strong>Training effectiveness:</strong></td>
<td>Quantitative:</td>
<td>• Mailbox usage</td>
<td>Comparison of pre- and post-training usage reports will show increasing adoption per month.</td>
</tr>
<tr>
<td>Increased usage correlates to training effectiveness.</td>
<td>• Office 365 reports</td>
<td>• SharePoint usage</td>
<td>Employee Net User Satisfaction score is 130+ based on the final training survey.</td>
</tr>
<tr>
<td></td>
<td>Qualitative:</td>
<td>• Lync IMs and conferences</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• End user surveys</td>
<td>• Minutes of Lync audio used</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Employee satisfaction</td>
<td></td>
</tr>
<tr>
<td><strong>Reduced operating costs:</strong></td>
<td>Quantitative:</td>
<td>• Mailbox usage</td>
<td>Comparison of pre- and post- Office 365 reports will show cost savings. Post-rollout usage of third party phone conferencing should show decreasing usage of 10% per month.</td>
</tr>
<tr>
<td>Increased adoption correlates to reduced third-party conferencing usage, travel time, and resource allocation.</td>
<td>• Office 365 reporting</td>
<td>• SharePoint usage</td>
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<tr>
<td></td>
<td>• Finance/Accounting reports</td>
<td>• Audio conferencing billing and usage</td>
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<td></td>
<td>• Help Desk reports</td>
<td>• Travel and phone expenses</td>
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<td></td>
<td>• Travel and phone expense reports</td>
<td>• Help Desk calls</td>
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<td></td>
<td>• Output measures</td>
<td></td>
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<tr>
<td><strong>Increased productivity:</strong></td>
<td>Qualitative:</td>
<td>• Time required to complete projects</td>
<td>Time to complete customer orders should drop by 15% within 6 months.</td>
</tr>
<tr>
<td>Increased adoption correlates to faster communication and decision-making, shorter time to complete tasks.</td>
<td>• End user surveys</td>
<td></td>
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</tr>
<tr>
<td><strong>Improved collaboration:</strong></td>
<td>Qualitative:</td>
<td>• Employee satisfaction</td>
<td>Teams that work from multiple locations will report improved feelings of connection with their teammates within 3 months of the Lync rollout.</td>
</tr>
<tr>
<td>Increased cross-team and cross-location communications.</td>
<td>• End user surveys</td>
<td>• Time saved</td>
<td></td>
</tr>
<tr>
<td><strong>Improved employee satisfaction:</strong></td>
<td>Qualitative:</td>
<td>• Employee satisfaction</td>
<td>Employee satisfaction improves by 15% within 6 months.</td>
</tr>
<tr>
<td>Flexible working options improve employee satisfaction through increased engagement, reduced stress, improved work-life balance.</td>
<td>• End user surveys</td>
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</table>
A good awareness campaign informs, involves, and inspires your users, resulting in a much higher adoption rate. Awareness creates the “buzz” around a new product or technology. It is important to address change with positive but sensitive messaging, enabling users to see the value of the new technology and how they can benefit from using it. To ensure the right message lands in the right hands, it’s critical to organize a proactive communication strategy for your end-users to send the message you want your users to receive.

Begin your planning with the end-goals in mind. An effective awareness and change management campaign will help users fully understand the change and how it impacts or benefits them and the organization. It will reduce end-user ambiguity and frustration, and will help you realize a quicker return on investment by minimizing the end-user learning curve.

- **Inspire and drive new behaviors.** Once you’ve identified the behavioral changes you want to encourage, you can start determining the best ways to get the point across to your users. Inspire your users to work a new way through videos and “work smart” reference materials. Provide various levels of training resources to help users get up and running quickly, and then support them as they progress to more advanced usage.

- **Plan communication tactics.** Use multiple awareness channels to maximize your results, and implement a broad marketing campaign to drive awareness.

- **Organize Champions.** Champions are super users who can provide informal training and support to other users in your organization on a peer-to-peer basis. Creating this type of informal learning community has proven extremely effective in encouraging adoption.

- **Open feedback channels.** Throughout the rollout, it’s important to offer employees a way to ask questions or give feedback. Be sure to create a feedback and triage team to address end-user inquiries promptly.
Now is the time to develop a plan and budget for your awareness and training materials. Because you’ve already determined the overall behaviors you want to encourage, you can focus your communications on just the essential scenarios and tasks your users will need to learn. To reduce complexity, identify 15 or 20 total tasks to focus on, and then concentrate on those tasks throughout your rollout.

Inform, involve, and inspire your users, and it will pay dividends in the long-term including positive end-user experience, reduced help desk incidents, viral adoption, and increased usage across all workloads. Use multiple channels in your awareness campaign; you’ll get a stronger response if you say the same thing in different media. Develop an initial plan, and then think ongoing -- how can you revisit those communication channels throughout the year to keep interest high?

Discuss these questions with your project team to help define the behavioral changes you want to encourage:

- What do we want users to do? How do we want users to be inspired?
- What are some success stories and scenarios we can relate?
- How, when, and to whom do we communicate each message?
Plan communication tactics

Awareness can take many forms, from an email, to a poster in the cafeteria, to a formal launch event. To maximize results, use a variety of tactics. Following are a number of effective communication tactics for driving awareness. Review each in detail, and choose the options that best fit with your organization’s culture. Use the “Awareness Worksheet” tab in the Office 365 Rollout and Adoption Workbook (in the Workbook folder in the Change Management download package) to track information about each communication piece you plan to deliver, including key messages, audience, method of delivery, timing, and reviewers.

Sample Awareness Campaign

<table>
<thead>
<tr>
<th>8 weeks</th>
<th>6 weeks</th>
<th>4 weeks</th>
<th>2 weeks</th>
<th>1 week</th>
<th>Launch</th>
<th>Post-launch</th>
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</thead>
<tbody>
<tr>
<td>Internal site announcements</td>
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<td>First Touch event</td>
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<td>Posters and booklets</td>
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<td>Weekly Scenario Spotlight</td>
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<td>Help desk training</td>
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<td>Champions training</td>
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<td>Learning Center (set up, then update as needed)</td>
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<td>Pilot survey</td>
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<td>Early adopter videos</td>
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<td>Lunch &amp; Learn</td>
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<td>Tips and Tricks</td>
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<td>Intranet site announcements</td>
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<td>FAQ</td>
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<td>Launch event</td>
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<td>Welcome email</td>
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<td>End user training</td>
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<td>Policies, best practices</td>
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<td>Incentives, contests</td>
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<tr>
<td>Weekly reports, success criteria updates</td>
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</table>
Internal site announcements: SharePoint team site, intranet, travel sites
Starting 6-8 weeks before launch

Using a SharePoint site to manage your Office 365 rollout can save vital time while increasing clarity and excitement. Your Office 365 SharePoint site should contain centralized resources for providing users real-time information on Office 365, including rollout schedule, updates, feedback, frequently asked questions, tips and tricks, training documents, team contacts, and success progress. Creating the familiarity of a one-stop-shop, helps build confidence and alleviate calls to the help desk for basic Office 365 questions.

Also think about advertising Office 365 on your travel site. For example, some customers have listed Lync for Office 365 as their primary meeting tool, requiring business justification for traveling. Reducing travel costs can have a big impact on your organization’s return on investment, not to mention the reduced carbon footprint, worker productivity, and work/life balance. For new hires, creating habits from the beginning is much easier than re-educating later one. Include a datasheet on the expectations for using Office 365, and point users to your Office 365 intranet for getting started and training resources.

First Touch Event
6-8 weeks before launch

A First Touch Event is a great way to show people how easy basic Office 365 tasks are. Users can browse Office 365, talk to a team member at various stations, get training resources, and learn more about the pilot resources available, your Office 365 intranet site, and the Microsoft-hosted Office 365 Learning Center at [http://office.microsoft.com/en-us/FX102821134.aspx](http://office.microsoft.com/en-us/FX102821134.aspx). Set up the event in a high-traffic area such as a lobby or lunch room. Use a long table with notebook computers, mobile devices and audio devices set up at stations around the perimeter inviting people to try them out. The impact of these small scale events expands when people share what they learned with peers in the organization. A customizable **First Touch Event Deck** is available in the **Presentations** folder in the Change Management download package. You can use this deck for a large formal presentation or run it on a laptop at one of the stations.

Posters, booklets, T-shirts, and other print communications
Starting 6-8 weeks before launch

Make sure Office 365 has visual presence. Many users will “see” Office 365 before they read about it. Find people where they are and capture their imagination with relevant, visual communications. For example, create buzz by hanging a series of posters in common areas, such as lobbies, conference rooms, office kitchens, cafeterias, and elevators. Include information on brown-bag sessions, demonstrations, and intranet sites. Sample posters and other printable materials are available in the **Print_Communications** folder in the Change Management download package.
Email campaign and newsletters
Starting 6-8 weeks before launch

Email is the most common channel for communicating to users. For optimal results, keep emails short, with a clear call to action and links to more information like FAQs. Keep your audience in mind by creating content that answers the main question your end-users have: "Why are we moving to Office 365?" "What is required of me?" "How does this help me do my job?"

- Make your emails attractive, with style and colors that are consistent with your campaign.
- Enable two-way communication with your users by including links to your internal site for feedback, support, and training.
- Send emails from an individual (preferably an executive sponsor), not a group. Emails about a new technology that will impact a user’s daily activities are generally best received when sent by a person.

For samples, see the email samples in the Email_Templates folder in the Change Management download package.

Highlights and teasers
Starting 4 weeks before launch

Members of the rollout team can add short, targeted tips to their email signatures to catch the attention of users, and embed links to teaser videos online. Give quick descriptions of features that are new, obvious time-savers, or just plain cool. You can also add these highlights and teasers on your intranet sites and on colorful fliers posted anywhere people gather. This subtle yet informative approach costs very little in terms of time and effort.

Sample teaser videos are available in the Videos folder in the Change Management download package. Additional SharePoint teaser videos are available on the Discover SharePoint site at: http://www.discoversharepoint.com/home.

Lunch & Learn
4 weeks before launch

Lunch & Learn sessions are a great way to keep the momentum going. Informal Lunch & Learn sessions can offer users the ability to ask questions in an open forum, share experiences or to showcase a new or highlighted feature of Office 365. Conduct Lunch & Learn sessions on a regular cadence (for example, quarterly) and encourage participation by offering incentives.
Launch event

Launch day

Hold a large-scale launch event using the PowerPoint slides the day before or the day of your Office 365 rollout. Invite everyone in the rollout group. At the event, have project team members actively engage people to build vital rapport, confidence, and support within the organization. Answer questions, address concerns, and encourage the use of Office 365.

- Use your executive sponsor to kick things off and communicate the value proposition.
- Print T-shirts for Champions to wear on launch day and during the support period for a unified and recognizable look.
- Display printed materials to raise awareness about the day’s activities and showcase the most exciting Office 365 features.

A customizable Launch Event Deck is available in the Presentations folder in the Change Management download package.

Policies and Best Practices

Launch day

Along with end-user training, be sure to communicate your organization’s specific policies and best practices so your users know what features are available to them, as well as how they’re expected to use Office 365. The fully customizable Policies and Best Practices documents contain a baseline set of recommendations from Microsoft. These templates are available in the Policies folder in the Change Management download package. You can reuse, customize, or delete entire portions of these documents to reflect your own policies and best practices.

Incentives, contests, awards

Launch day and after

Offering incentives for using Office 365 can help generate momentum. Whether as a raffle-style contest, or giveaway at a cafeteria demo, users get excited when they “win,” in essence creating a win-win situation for driving Office 365 adoption.
Organize champions

Several Microsoft customers chose Champions as the number one factor in their successful rollout. Champions are super users who have agreed to provide informal training and support to others in your organization to create a learning community. Champions can support users on a peer-to-peer level by doing quick demonstrations during a team meeting, offering informal training, or simply leading by example.

Finding Office 365 champions

One way to find Office 365 champions is to send a recruitment email to users describing the program requirements and listing what they’ll receive in return. Aside from enthusiasm and expertise, a normal champions program requires a few hours each month from each individual.

At Microsoft, potential champions for Office 365 and other products were asked to fill out an online questionnaire. They selected the types of activities they were willing to undertake and chose the resources they thought they would need. Microsoft provided training resources and promotional items for champions to distribute and an audio device and a webcam to help demonstrate product capabilities. We have also found that Office 365 Champions attract other Office 365 Champions, so expect some organic growth of the program while the champions become more visible in your organization.

Putting champions to work

To begin, set up a distribution list to give Office 365 champions a way to share information and provide feedback to the rollout and adoption team. You can also use the list to communicate with your Office 365 champions about specific barriers to adoption.

For example, if users are having an issue with audio performance, you might want Office 365 champions to help ensure that their coworkers are using an audio device that is optimized for Office 365. You could ask them to make an announcement at a staff meeting about why this is important and how to tell if a device is optimized.

Tips for running an effective Office 365 champions program:

- Set up a blog, wiki, or FAQ for the Office 365 champions to monitor and update.
- Ask Office 365 champions to make short training recordings, and then post on your intranet site.
- Encourage Office 365 champions to lead scheduled brownbag sessions with internal groups.
- Offer Office 365 champions incentives such as gift cards, T-shirts, or other exclusive items. Even something simple like a special door sign can help champions feel both motivated and recognized.
**Leading by Example: “Show and tell”**

MIT Sloan Management Review reports research that people won’t embrace a new product unless they expect to get nine times more impact over their current approach. Champions and rollout team members should show users how easy Office 365 is to use and how productive it can help them be. If you lead by example, others will follow suit. Consider doing the following:

- Have business units designate times during which team members are encouraged to try Office 365.
- Have leaders run meetings using Lync and Office 365 team sites, and encourage attendee participation.
- Have users collaborate through IM to come up with a solution to an important business challenge. Document and share their experience with others.
- Share Office 365 tips, best practices and other updates in team meetings to encourage open communication.
Open feedback channels

During all phases of your rollout, it's important to offer employees a way to ask questions or give feedback. The best way to do this is to create a feedback and triage team to address end-user inquiries promptly.

You can also maintain a Frequently Asked Questions (FAQ) list to address the most anticipated questions. Post the FAQ on your internal site, and assign a feedback team to update it regularly.
Once your employees have heard the buzz about Office 365 and seen the new tools in action at First Touch events, it’s time to build on the excitement by offering a variety of training options that will get users productive right away. Training can and should happen in multiple ways to accommodate different learning styles, geographic challenges, resource constraints, and roll-out strategies. You’ll want to develop a comprehensive training plan that takes into account the technologies being rolled out, the core tasks user will need to learn, and the available training budget.

The first step in creating your plan is to understand who the training is being developed for. Most likely, you’ll have multiple audiences to serve with your trainings so you might find it helpful to use the Six-W approach to information gathering: **Who, What, Where, When, How, and Why.**

- **Who** are you training?
- **What** is their role in the organization? What are some of the tasks they perform? What are their permissions levels?
- **Where** do users perform these tasks? On the road using a mobile device? In the office using a workstation?
- **When** do users perform these tasks (24/7, different time zones, during core hours)? When do they need access to the tools? When should training be completed (rolling basis, according to project priority, according to user role)?
- **How** integrated is the toolset in day-to-day activities? How might organizational policies be affected with the integration of the new toolset (sharing documents, storing files, collaborating with external partners, using email attachments)?

**The “Why” is most important**

If the people in your organization have never used Office 365, your training should do more than simply introduce them to procedural “how-to” information for performing tasks. The how-to is the easy part. They’ll want to know why the change is happening, why they should care, what’s in it for them, and why they’re being asked to change. Thus, a key part of your training plan is to demonstrate the benefits of the change. Understanding and addressing user concerns is key toward easing the transition and ensuring a successful deployment. Here are some suggestions to get you started.
**Lead with benefits**
Most people view software as a tool they use to perform the “real work” of their job. They might not get excited about learning software just because it’s new but might be eager to learn how they can accomplish their tasks more easily or efficiently.

When you communicate to users about the move to Office 365, explain what their work will look like in the new system, and what types of efficiencies or benefits they can expect in comparison with any old tools or processes.

**Use work scenarios to get people engaged with the technology**
Consider structuring your training around familiar work scenarios. Use the tasks or business processes that are familiar to your audience as a way to draw your audience into feature-specific information.

For example, if people will use SharePoint document libraries to manage trip reports that they used to save to a file server or manage by e-mail, you might introduce the topic of document libraries by saying, “Now let’s look at how we’ll manage trip reports.” This could be more relevant and engaging than saying “Now let’s talk about uploading documents to a document library.”

After you determine what types of tasks your users will perform, you can pinpoint the types of feature-specific content that they might need.

**Include your organization’s governance model**
As part of your training plan, consider integrating information about the rules, processes, and best practices that your organization has put into place around Office 365. This set of information is called a governance model and typically topics such as:

- Site creation
- Permissions management
- Information architecture
- Site lifecycle and retirement
- Storage limits
- Classification of information
- Customization
- Data protection
- Navigation
- Search
- Email communication
- Roles and responsibilities

Some of these policies might already be in place while others will be formulated with the roll-out of Office 365. Some will be dependent on the complexity of your installation, features being used, and size of your user population, while others will be more global in nature. Regardless, by incorporating the governance model directly into your training, you can help ensure that users are aware of and compliant with organization guidelines and practices.
Plan for a Learning Center on your intranet
Most companies that successfully deploy Office 365 create Learning Center for hosting training and adoption resources. The Office 365 Learning Center site typically includes frequently asked questions (FAQs), links for contacting support, getting-started information, and links to Help and training resources, such as videos and how-to information. The site should continue to evolve over time as new teams are added, features rolled out, and efficiencies discovered.


Mobilize champions
While you or a small group of people in your organization might be officially responsible for providing Office 365 training and support, you don’t need to go it alone. It’s a good idea to call upon your network of champions who are committed to developing their Office 365 expertise and providing peer coaching and assistance. This not only aids adoption at the grassroots level but builds a network of support for all types of users.

How do you identify these champions? Good candidates are those who have credibility within their teams and know the tasks and responsibilities of users there. They understand internal processes and have a keen interest in technology. They are early adopters of new software and tech gadgets and are well acquainted with user forums. They have good communication skills and have emerged as leaders on the team, or they might be responsible for managing the very processes that will be affected by the move to Office 365.

Train your champions first. Bring them up to speed on your organization’s plans for Office 365, help them gain expertise with the features and workloads, and make sure they understand the governance model. Ask for their feedback after they complete the training so you can modify your approach and update your training materials in time for broader user training.

Once your network of champions is established, use the champs to help deliver training at the team or department level and to serve as a resource for colleagues who need one-on-one coaching.
Plan for a pilot training program

An Office 365 training pilot program provides a perfect opportunity to test the content and strategies in your training plan. The pilot training period also enables you to generate excitement among those involved. Typically the pilot is conducted with champions, the support team, including help desk, and the executive staff.

- Champs will be your “boots on the ground” who mingle regularly with users in their work environments and can provide inspiration and assistance once folks start to use Office 365 for day-to-day tasks.
- The support team is made up of technical experts who have a deep understanding of the Office 365 suite and how it was deployed in the work environment. They respond to help desk calls and can provide feedback on user satisfaction, nature and quantity of help desk calls, and adoption statistics.
- The executive staff includes company executives and their administrative assistants. Because of their visibility and span of communication, these are your biggest evangelists for new technologies. Train them early so they can set an example for employees at all levels of the organization chart.

The pilot is also a good time to train other trainers on Office 365 technologies and training strategies. When conducting the pilot, be sure to collect feedback, and measure the results of the training so you can update the training as necessary before rolling it out to the general user population.
Sketch out a training schedule

A comprehensive training plan includes multiple phases and will take several months to implement. A big chunk of the work is planning, but you’ll also invest quite a bit of time in creating or collecting training materials. Here are the phases and durations of a typical training program.

<table>
<thead>
<tr>
<th>Planning</th>
<th>Pilot</th>
<th>Awareness</th>
<th>Training</th>
<th>Follow-up and support</th>
</tr>
</thead>
<tbody>
<tr>
<td>2 to 3 months</td>
<td>6 to 8 weeks</td>
<td>2 to 3 weeks</td>
<td>Launch</td>
<td>1 to 3 months</td>
</tr>
</tbody>
</table>

**Planning Phase**
2 to 3 months before launch

Develop the training plan, which includes identifying the audience, tasks, schedule, training tools, training personnel, facilities, and budget. This is also the point in the project where you’ll define the requirements for your online Learning Center. Work with your team, particularly with the web developer, to define the site that will host the Help and training content. Assess available materials, identify gaps, and ensure that the budget and resources are available for creating the site and hosting the Help and training resources.

Communicate your plan and schedule to all stakeholders.

**Pilot Phase**
(6-8 weeks before Launch)

Develop and/or curate training materials, including instructor guides. The pilot phase is a perfect opportunity to test the effectiveness of the Help and training materials. Schedule training for IT pros; the support team, which includes help desk and Office 365 champions; and early adopters. Use feedback from the pilot-phase training to identify gaps in the Help and training resources and areas of the user experience that will need additional content for the large-scale rollout of Office 365.

Review and approve Learning Center designs and start publishing content to the developing site. This is also a good time to review any existing content for accuracy and relevance to your audience and training goals.
**Awareness Phase**
(2 to 3 weeks before Launch)

Start training the support team and early adopters, including executive staff. It’s important that they understand the new products and technologies that are being introduced, the issues that users may experience, and the resolutions to the issues. In addition to starting training, compile frequently asked questions (FAQ) to outline common issues that the support team will likely need to address.

Incorporate any learnings from the pilot phase into the intranet site and training materials before launch.

**Training Phase**
(Launch day and beyond)

Begin training end users based on your adoption and training plan.

**Follow-up and Support Phase**
(1 to 3 months after Launch)

Measure usage, adoption, and user satisfaction. Collect net user satisfaction (NSAT) data through end user surveys. Usage and adoption numbers, combined with NSAT data and help desk incidents, provide a good overall indicator of health and the effectiveness of the rollout and adoption program.
How you choose to deliver training depends upon both the size and culture of your organization. Other factors to consider include time, facilities, equipment, geography, and financial constraints.

Training can be delivered in a variety of ways:

<table>
<thead>
<tr>
<th>Delivery Method</th>
<th>Training Materials Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Formal classroom environment with hands-on labs.</td>
<td>Instructor guide, student guide, PowerPoint deck for in-class presentation to students, lab files preinstalled on classroom computers, resource guide with links to internal support site and external sites or forums, email addresses for local champs,</td>
</tr>
<tr>
<td>Small group demonstrations</td>
<td>PowerPoint deck for presentation to group. This is customized to address actual scenarios and tasks applicable to the audience.</td>
</tr>
<tr>
<td>self-directed reading and online training</td>
<td>Videos, online articles, FAQs, checklists, contact information for local champions</td>
</tr>
<tr>
<td>On the job</td>
<td>Task-specific job aids, checklists, contact information for local champions</td>
</tr>
</tbody>
</table>

The most flexible and effective approach to training and supporting your users might be to offer some combination of these methods:
Consider kicking off your training efforts by holding formal meetings with individual organizations or large groups of users, where you can demonstrate your Office 365 suite of tools and highlight key areas or solutions. Use these meetings as an opportunity to build enthusiasm by highlighting the benefits that users can expect. Let users know what kinds of follow-up training opportunities or materials will be available to them in the coming days, weeks, or months.

Follow up the kick-off meeting with small group demos among teams or groups (group together users who have similar training needs, based on job role or permission level). Have the relevant internal Office 365 experts set up and lead these.

Create a mechanism for day-to-day support. Perhaps internal experts can hold “office hours” where they answer questions or provide 1:1 support. Consider creating a user community or Yammer discussion list where users post questions and answers.

Finally, encourage users to use the online resources on Office.com for how-to articles or detailed feature information. Many of these resources can easily be printed for quick reference.
After training is complete, you’ll want to keep the lines of communication open so users can continue to feel supported and share best practices or tips & tricks with one another. A Yammer group is one way to do just that. Yammer groups enable users to stay informed about topics of interest, follow champs or other expert users, “like” or share interesting posts, read updates in your built-in newsfeed, participate in virtual discussions, and build community among users. Yammer is built in to Office 365 and is a private social network that only your co-workers can join.

Another option is to integrate SharePoint community features within your training and support site. Community site integration will enable you to reward employees for participation in the community and enable employees to build credibility among their peers. Every time someone likes a user post or follows a particular user, that user’s credibility in the community goes up. This credibility translates into reputation points or badges, which are visible indicators of a user’s value to the community. Badges can reflect the role a member plays, such as MVP or moderator, or a contribution level achieved, such as expert or top contributor. Badge titles are completely customizable to suit the culture and flavor of your organization.
All during the Office 365 rollout process, you’ve been collecting feedback, monitoring usage and acceptance levels, and modifying procedures and resources as appropriate. Now is the time to consolidate feedback, report on success metrics, refine help desk procedures, and prepare to begin the entire process over again with a new group of users.

- Provide ongoing support. Provide your first-level help desk agents with troubleshooting resources.
- Assess user satisfaction
- Measure usage and adoption

Enlist your entire project team to ensure each department is ready to support the influx of users. Monitor your progress and adjust your plan based on user reception and feedback. Your help desk is where new users will go with questions. Be sure your support team is well-prepared with information and troubleshooting tips for new users. Be sure to document key things learned, including what went well, and areas for improvement, during your Enterprise Rollout phase. Leverage this data to plan for successful long-term operations of Office 365.
Your help desk is on the front line for providing end-user support for Office 365. The level of support an end-user receives could directly impact how satisfied a user is with Office 365 and how deeply they adopt the applications. If a user is unable to resolve issues or get their questions answered in a timely manner, they may determine that Office 365 is too hard to use.

It’s critical that your support system, both automated and physical resources, is set up to drive a positive user experience, while resolving questions and issues quickly and efficiently. By establishing a detailed automated system, you can reduce calls that get through to the help desk agents, allowing end-users get the answers they need, and enabling your support agents to focus on troubleshooting tasks.

Enlist your entire project team to ensure each department is ready to support the influx of users. Monitor your progress and adjust your plan based on user reception and feedback. Be sure your support team is well-prepared with information and troubleshooting tips for new users. First-level help desk agents with very little training can use the Help Desk Troubleshooting Guide (in the Support folder in the Change Management download package) to identify user problems and provide users with potential solutions.

Here are some tips for ensuring your Office 365 end-users have an optimal experience with Office 365 support:

- Ensure all help desk agents are properly trained to triage and support Office 365 calls prior to broad deployment. Measure readiness through test calls and surveys.
- Set up automated prompts on your phone support system, to get users to the most appropriate support team quickly. Include Office 365 announcements on your phone support system to educate users on the current status of Office 365 as well as where to go for more information.
- Establish an alert system to notify your help desk when issues arise or for planned downtime, so that they can effectively assist callers.
- Detail your SLA plan to hold support reps accountable for following up with end-users and to set the right expectations.
- Make sure the intranet site for Help Desk Agents is updated with troubleshooting information.
- Create a customized FAQ for Help Desk Agents. Specifically highlight any functionality that isn’t enabled for in order to decrease troubleshooting efforts.
- Post a customized Help Desk Script.
- Provide guidance regarding Optimized Devices (especially since this is a known cause of top issues) [http://technet.microsoft.com/en-US/Office 365/gg278164.aspx](http://technet.microsoft.com/en-US/Office%20365/gg278164.aspx). Be sure to include verification of what device is being used in the troubleshooting steps.
Assess user satisfaction

At any point in your pilot or general rollout, you can distribute user satisfaction surveys to gather data about your users' knowledge of and experience with Office 365. Depending on when you administer the survey, the results will help you determine how best to roll out Office 365 and how successful you've been.

The following are some suggestions for when and how to survey end users during your pilot or during your general rollout:

- Circulate a baseline survey shortly before pilot end-users receive activated accounts and devices to gather baseline data about people's knowledge of Microsoft Office 365.
- Release a survey half-way through your pilot and your rollout periods to gather data about users’ knowledge and experience of Office 365 and your pilot. Use the results from the pilot mid-point survey to adjust and test your processes prior to a general rollout.
- Use a final survey immediately after the pilot period has completed to inform a go/no go decision and to determine whether you need to make adjustments to your general training and awareness materials.
- After rollout, use a final survey to assess user satisfaction with the rollout process. You can release this survey 90-days after launch, and then in quarterly increments to help measure user adoption from a satisfaction and productivity standpoint.

The Change Management folder contains a set of Sample User Satisfaction Surveys (in the Surveys folder in the Change Management download package) that you can use during both your pilot and general rollout.

It is best to define your own acceptable levels for Net User Satisfaction metrics. Microsoft adopters have found that setting a “good” target can be an iterative process. It’s productive for the project team to go through the survey in detail, specify the answers they expect given the change management and training work they have done, and then review the results in detail. The guide for Determining Net User Satisfaction (in the Surveys folder in the Change Management download package) can help you determine your own user satisfaction measures.
Measure usage and adoption

The process of collecting data should optimally begin before Office 365 is rolled out. By starting prior to rollout you can establish baseline metrics, and then collect additional data at pre-determined monthly intervals after rollout. The timeframe for realizing results may take 6 months or longer, since user adoption and familiarity with Office 365 will not happen overnight. Additionally some financial impacts may only be tracked on a monthly or quarterly basis.

It’s recommended that you employ a range of methods for measuring the success of each phase of your rollout, including feedback and survey forms, product-related games, and recommended usage reports. The reports available to Office 365 administrators can provide information about usage of Office 365 services, including mailbox usage, audio and video conversations, program sharing, remote assistance, and meetings. In addition, the internal reporting that is already available from the appropriate departments in your organization can provide critical data.

Example: Microsoft IT found that correlating user training activity with usage reports was a good way to verify training effectiveness. In one case, Microsoft IT tracked users who completed a self-paced module about conferencing and found a dramatic increase in online meeting usage following the training. At regular intervals during the rollout, the Microsoft IT rollout and adoption team sent updates to senior management. The reports included selected user comments; measures, such as user satisfaction and the number of help desk calls; and Monitoring Server reports showing adoption and usage rates. Taken together, these metrics provided a snapshot of the health of the overall system.