Onboarding To Microsoft Teams

AgileI.T.

Getting Started in Microsoft Teams

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WHAT IS MICROSOFT TEAMS?

At its core, Microsoft (MS) Teams is a software platform that provides a workforce with a single space to share information and work together. It is ideal for organizations that use Microsoft 365, as it integrates seamlessly with the entire suite of tools, including Skype to Microsoft Office. However, one of the biggest assets of Microsoft Teams, is that it offers extensions. This allows users to integrate software and products that are non-Microsoft.

Within MS Teams, there are four main features that apply to businesses—for educational institutes, there are additional features. The first feature is *Teams*. It gives a unique URL to the team administrator who can then send the URL to the group members, allowing them to join the Team.
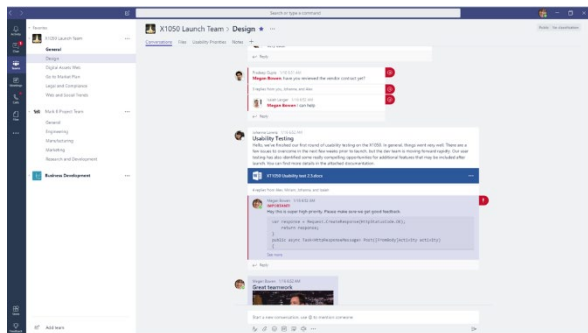

The second feature is *Messaging*. Messaging can be looked at as a subset of Teams. In other words, inside of each team, group members can create messaging channels. Each channel can have its own conversation topic and members can have discussions using text, images, and more. Messaging also has a private message option, enabling team members to communicate one-on-one. Finally, third-party services can be connected to Messaging, allowing information from these services to be submitted to the channel. Some of the third-party services include Facebook Pages, Bing News, Twitter, and MailChimp.
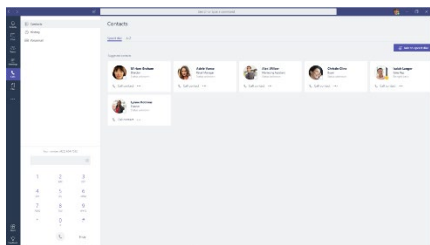
The third feature is *Calling***. This feature allows members to make, receive, and transfer phone calls to landlines and mobile phones. Members can also video conference within the software, create voicemail boxes, use VoIP, and instant message.**

Finally, the fourth feature is *Meeting***. Members can schedule meetings within channels, using Teams itself or by integrating the Microsoft Outlook plugin—using the plugin allows non-members to be invited to a meeting in Teams. Members can also create ad-hoc meetings. When members sign into the channel, they can see that a meeting is in progress.**
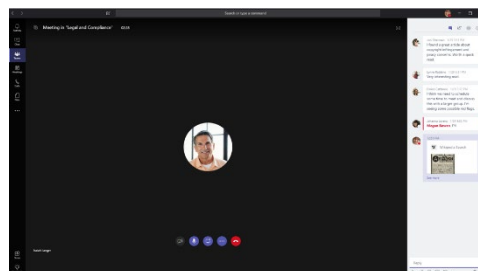
Teams channels can consist of just one member or thousands of members. As previously mentioned, members can invite individuals who are outside of the organization to join the Team, enabling incredible collaboration across organizations that are temporarily partnering together. Finally, throughout Teams, members can share files and edit them in real-time and collaboratively.

To round off Teams and allow it to be as integrative as possible, Microsoft developed multiple partnerships with various hardware vendors. Teams video calls can be connected to room-based projectors, mobile phones, and digital whiteboards.

Microsoft also expanded these integrations to software capabilities to augment workflows. There is a Teams app store, so third-party apps such as Zendesk and Trello can be used in conjunction with the

platform. There is also an App Studio which allows businesses and developers to build apps using Teams design language.

ADOPTION AND CHANGE MANAGEMENT

As with any new technology, companies need to develop a strategy before its implementation in order to allow that technology to be as effective as possible. In order to ensure a smooth planning phase, the following lays out key steps that every company should take when deploying Microsoft Teams:

1. Create a Pilot Group

In order to create a comprehensive plan for how Microsoft Teams will fit into the business, leadership first needs to assemble a team of individuals from various departments, or the same department. This team will help to form the implementation plan for MS Teams. It's best the group be made up of diverse individuals, including at least one person in a leadership role in order to give the group influence across the organization. There should also be at least one employee from the IT department, to help users with any technical issues, and 3-10 employees who will be utilizing MS Teams. These individuals can either be from the same department, or cross-departmental.

This mixture of hierarchy and departmental know-how will provide the group with essential perspectives, from data security and hardware implementation to ensuring workforce adoption of the platform.

The fact that they are from different areas of the organization will also help to communicate to the organization what MS Teams does and how it can be harnessed.

2. Select Champions

After selecting your pilot group, you need a few individuals that can lead the group. These individuals are called: *Champions.* **The champions are the advocates of MS Teams and has influence over what the organization should be utilizing. Not everyone in the pilot group, let alone the company, will see the value of MS Teams right away. Thus, the role of the champions is to ensure that the value proposition of MS Teams is constantly communicated, whether it be through posters, all company meetings, announcement emails, etc. Typically, the champions are the Chief Executive Officers (CEO's), the owners, or anyone who harnesses a lot of influence within an organization.**

3. Allow the Pilot Group to Use Teams For Planning

It is essential for the pilot group to use Teams during their planning process. Using the platform will allow them to see and feel exactly how the system works and understand the ways it could be used by the various constituents at the company.

4. Identify Use Cases

It is easy to look at how MS Teams works and its various features and state that everyone in the organization should start utilizing it. It is slightly more complicated, yet much more valuable, to break down how each departmental or cross-departmental team in the organization could use Teams on specific projects and tasks. By breaking this down, planning and later communication will be much more straightforward. Each department can be introduced to MS Teams in a customized way, allowing them to see the benefits that the platform will offer them.
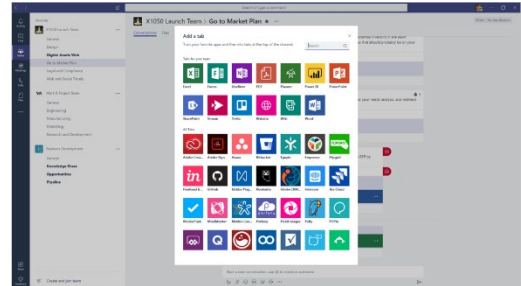
5. Create a Technical and Non-Technical Plan

Microsoft has developed a step-by-step guide (technical plan) for getting organizations ready for MS Teams implementation. Larger companies can usually use FastTrack Benefits at no extra cost. Alternatively, the FastTrack Onboarding Wizard is also available for organizations who want to be more hands-on in the setup process.

There is also a non-technical plan that needs to be created. This plan is all about managing the change that Microsoft Teams will bring to the business. The pilot group should develop a communication strategy and training program to ensure that the entire workforce embraces MS Teams and fully utilizes it.

6. Run a Test

One of the most effective methods for identifying hurdles that could prevent the organization from effectively employing MS Teams is to conduct a test. The test should be run for a single project and with a single departmental team. The team should get training on MS Teams before it is tested and should be asked for feedback after the test ends.
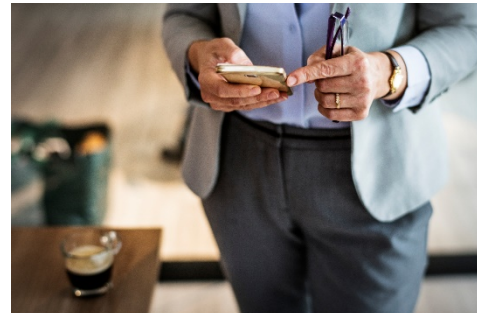
7. Full Deployment

Once the test has been run and any kinks or glitches have been ironed out, the business can fully deploy MS Teams throughout every department. This will require extensive communication and assistance from leadership and the entire pilot group.

8. Monitoring

No business can expect that everything will go smoothly right off the bat with MS Teams. Some employees will face challenges. There will be employees who struggle to see how it can fit into their work. It is for this reason that the pilot group needs to continue to oversee the implementation of Microsoft Teams after it is deployed. They should be responsible for gathering data on how effectively it is being used within the organization (including how much time the workforce is spending on it), what tasks and projects it is being used for, and any other feedback that individuals employees can give about their experience. These insights will allow the pilot group and

the champions to find ways to improve the way it is being used across the organization and within each department.

THE FINAL STEP: TRAINING

A key component of MS Teams success is training and re-training. Every employee who has access to MS Teams should know exactly how they can benefit from it and in what ways they can use it. This means that the organization should provide an in-depth training course on MS Teams whenever new employees are onboarded.

NEXT STEPS

Agile IT's Modern Workplace solution is a multiweek engagement where we embed a certified Teams Productivity Specialist within a functional group at your organization, who works to identify your workflows, and business processes and guides the adoption of Teams in a functional and practical way, not only assisting in setting up your Team, but empowering your groups with the tools they need to continuously manage and improve their productivity and collaboration across all of Microsoft 365. To find out more about how this can benefit your organization, **schedule a call today to request a free quote.**