**Making Teamwork More Productive:  
*Plan your organization’s teamwork and collaboration strategy using Microsoft Teams and other Microsoft 365 solutions***

Workshop Workbook

# Teamwork 101

Merriam Webster defines teamwork as ‘work done by several associates with each doing a part but all subordinating personal prominence to the efficiency of the whole’. Basically, its people working together to get things done and drive results. Formalizing a teamwork strategy in your organization can help drive efficiencies, build rapport, streamline productivity and more. Teamwork encompasses two core attributes: the people doing the work and the tools/processes they use to get their work done. M365 offers a comprehensive teamwork solution, with Microsoft Teams at the helm.

# About the Workshop and Workbook

This interactive workshop offers insights around teamwork, considerations for designing and implementing your teamwork strategy, best practices and real-world examples, and includes hands-on individual and group activities to help you build your own teamwork and collaboration plan.

A companion guide to the workshop itself, this workbook should be used to take notes, complete in-class activities and capture questions for follow-up with your internal project team. This workbook is organized into two core components: designing your teamwork strategy and implementing your teamwork strategy, capturing all the planning guidance you need to tailor a teamwork and collaboration plan for your organization.

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# Designing your Teamwork Strategy

The first step in your teamwork planning is to define what teamwork means to your organization, what your goals are, where you are against those goals and how you will measure success.



## Assessing your current state -> aspired state

* **How does your organization define “teamwork”? What are the core attributes?**
* **What are your goals for implementing a teamwork strategy?** (eg: Facilitate productivity across teams, improve project collaboration, increase user sentiment (decrease frustration), drive market share, reduce cost by simplifying the number of tools you need)
* **How will you measure success?** Sample:

|  |  |  |  |
| --- | --- | --- | --- |
| Item | Goal | Measure via | Target |
| User Sentiment | User recommends teamwork strategy | Survey | >85% CSAT |
| Productivity | Projects are completed on/ahead of schedule, with quality (sub goals could be cost savings, go-to-market time, etc) | Project schedule  A/P | 90% of projects completed on time/ahead |
| User Adoption | Users actively using the defined apps | O365 usage report | 90% use the apps daily |
| Technical Deployment | Respective apps are deployed with quality  Eg: Calling in Teams | CQD reports | <3% of poor audio calls |

*TIP: Make sure you have a way to measure against your goals! Be sure to define SMART goals and assign a project team lead for tracking the defined data points, before, during and after your implementation*.

* **Where is the current state of your teamwork strategy?** (eg. Apps and tools deployed, Use cases, User sentiment, Productivity, Cost)
* **What are your biggest challenges/blockers with your teamwork strategy? What’s not working today?** (Eg: Tool deployment, tool utilization, processes, onboarding and training, cross-team collaboration, no strategy in place today)

## Building your people-centric and project centric scenarios

Each role within an organization has unique attributes for how they work, who they work with, and what tools they need. In addition, teamwork can be *people-centric* (persona) or *project-centric* (scenario). Taking time to assess the types of teamwork strategies that are relevant to your organization will enable you to tailor your approach for optimal results.

**Sample: Persona-centric – Regional Sales Team**

|  |  |
| --- | --- |
| Considerations | Notes |
| Core attributes – who they are, what they do (day in the life) | * Work remotely (on the road, hotels, customer sites) * Relationship-focused – core external * Sharing demos/collateral/contracts |
| Teamwork functionality | * Quick access to sales collateral * Reach an expert * Fast-turn questions and approvals * Sales meetings, pipeline reviews * Sales training resources * Customer database management |
| Teamwork apps | * Teams/channels by region or customer * SharePoint for collateral/resources\* * XLS/Power BI for pipeline and databases\* * Teams for online meetings * Teams mobile app for connecting on the go * Teams app integration with CRM system * Yammer for broad-reach SME insights and information sharing |
| Teamwork value-prop | * Alleviate searching in multiple places for information (save time) * Quick-turn answers via channel sharing and SME outreach (accelerate deals) |
| How would you configure Teams for this scenario | * Team: Northwest Sales Team * Channels   + General   + Customer insights   + Sales readiness   + Fun * Channel meetings * Tabs   + Sales pipeline   + PowerBI reporting * Files   + Pitch decks and other readiness materials |

**Sample: People-centric – Event Planning**

|  |  |
| --- | --- |
| Considerations | Notes |
| Core attributes | * Cross-team stakeholders * Frequent, targeted meetings * Lots of pieces/people coming together (budget, schedules, presentations, registration, etc) |
| Teamwork functionality | * Quick access to project schedule and task assignment * Open conversation channel to keep everyone in-the-know   + Core workgroup   + Cross-team * Central location for current presentation files and other resources * Bring new project team members up-to-speed quickly * Way to encourage and support one another to keep momentum |
| Teamwork apps | * Team/channels to organize project and threaded conversations * SharePoint for hosting PPT files\* * Planner/Trello for assigning individual project tasks and due dates\* * Teams for online meetings * Teams mobile app for connecting on the go * Memes/giphys and @mentions to maintain excitement and momentum |
| Teamwork value-prop | * Contained end-to-end project management (save time, drive alignment, stay on track) |
| How would you configure Teams for this scenario | * Team: * Channels   + General   + Budget   + Logistics   + Vendors * Channel meetings * Tabs   + Budget tracking   + Project plan * Files   + Presentations, weekly check-ins |

**ACTIVITY: Copy and paste the below tables, then complete for each people-centric and project-centric teamwork use cases you are implementing.**

It’s easy to get carried away. Stick to 2-3 core people-based use cases for teamwork, considering those that have a wide range of appeal.

Tips:

* *Start small*. Save bigger, more complex projects for after you’ve tested the teamwork model
* *Leverage new projects*. Avoid changing an existing project that’s well underway
* *Consider timing*. Rolling out a new teamwork strategy to sales at the end of your FY may not be ideal

Teamwork Scenario: <name>

|  |  |
| --- | --- |
| Considerations | Notes |
| Core attributes |  |
| Teamwork functionality |  |
| Teamwork apps |  |
| Teamwork value-prop |  |
| How would you configure Teams for this scenario |  |

# Implementing your Teamwork Strategy

Implementing your teamwork strategy is just as critical as planning it. Taking careful planning and coordination can optimize results and ROI. Use the below framework to guide your implementation plan.

* **Project Stakeholders:** Who is accountable for success of the teamwork strategy? From your Executive Sponsor(s) to your Project Lead to the technical and user readiness teams, take time to ensure the right implementation team is engaged. The below list represents the core roles you’ll want to engage, but depending on your plan, you may enlist others as well.

|  |  |  |
| --- | --- | --- |
| Roles | Responsibility | Name(s) |
| Executive Sponsor | Drives overall messaging and accountability |  |
| Project Lead | Manages project team / activities  Oversees the teamwork project, ensures completion of all tasks |  |
| IT Lead | Ensures network readiness and O365 Portal configurations are in place  Confirms all required M365 apps have been deployed and validated for quality of experience |  |
| Support/Help Desk Lead | Manages readiness of your support desk to field questions from end-user related to the apps you will be using as part of your teamwork strategy |  |
| Change Management Lead | Oversees user change and adoption program, including aligning communications and training activities |  |
| Department Leads | Success owners who make the teamwork strategy relevant for their workgroup |  |

* **Project Definition:** Earlier in this workshop, you defined your scope and goals for your teamwork strategy. Building on that information, articulate the following:
  + **What is the scope of your teamwork project *at this time*?** You may define a long-term vision to pull in all M365 solutions, but perhaps you will start with Teams or Yammer for Phase I.
  + **What is the value to your users?**

*Tip: Consider your overall goals. If your teamwork strategy will save your organization money or reduce the number of tools a user needs, a user may see this as you taking a critical tool away for the organization’s bottom line, not a value to them. Take time to think about why a user should be excited about this teamwork plan and bring that value statement into your communications and training.*

* + **What governance and policies will you implement to help manage your teamwork strategy?**
  + **What is your risk and mitigation plan?**
  + **What is your timeline and key milestones?**
* **Technical Readiness:** Take time to ensure all apps that are part of your M365 teamwork strategy have been deployed and validated, and any policies have been assigned. This may include:

Microsoft Teams

Yammer

SharePoint Online

OneDrive

O365 Groups

Skype for Business Online

Other \_\_\_\_\_\_\_\_\_\_\_

\*\*Important\*\* If you are running any of the above apps OnPrem, consider how this informs your teamwork plans and define your strategy to move all apps to the cloud, if necessary, as part of your teamwork strategy.

* **User Readiness:** Driving user acceptance of your new teamwork strategy means ensuring the right communications land, the appropriate training is available to facilitate the learning curve and the right support is available when users have a question. Consider your people-centric and project-centric scenarios to help define your awareness, training and support plans, based on which apps you will be utilizing, and which people are impacted.

**What *awareness* channels will you leverage...**

|  |  |  |
| --- | --- | --- |
|  | …for your Pilot? | …for your broad rollout? |
|  | Emails  Launch/All-hands Events  Posters  Digital Signage  Success / Dept Managers  Champions/Ambassadors  Teams/Channels  Gamification, Badges  Other. Explain | Emails  Launch/All-hands Events  Posters  Digital Signage  Success / Dept Managers  Champions/Ambassadors  Teams/Channels  Gamification, Badges  Other. Explain |
| Notes (list value messaging/ communications that may be needed for specific teamwork scenarios) | <insert notes> | |

**What *training* channels will you leverage...**

|  |  |  |
| --- | --- | --- |
|  | …for your Pilot? | …for your broad rollout? |
|  | Microsoft-published online articles and videos  QuickStart guides  In-Product help for Teams (T-Bot)  In-house training team  Partner training  Other. Explain | Microsoft-published online articles and videos  QuickStart guides  In-Product help for Teams (T-Bot)  In-house training team (1)  Partner training  Other. Explain |
| Notes (list training that may be needed for specific apps as part of your teamwork strategy | <insert notes> | |

**What *support* channels will you leverage...**

|  |  |  |
| --- | --- | --- |
|  | …for your Pilot? | …for your broad rollout? |
|  | In-house support desk  Outsourced support desk  Self-help (eg intranet site)  In-product help (T-Bot)  Champions / Floor walkers  Feedback survey  Other. Explain | In-house support desk  Outsourced support desk  Self-help (eg intranet site)  In-product help (T-Bot)  Champions / Floor walkers  Feedback survey  Other. Explain |
| Notes |  | |

Read more about Champions and Success Managers: <https://aka.ms/O365AdoptionGuide>

* **Implementation:** How you execute your teamwork strategy can accelerate or impede success. It’s highly recommended to start with a pilot (perhaps pick one people-based and one project-based scenario to implement first), gather learnings and insights, mitigate any challenges and then roll out to the broader organization. Doing this helps building momentum and drives excitement via peer success.

**For your Pilot:**

* + **Which 2-3 teamwork scenarios will you validate?**
  + **Who are the users you’ll want to engage to participate?**
  + **What are the pilot logistics?**
    1. **Duration (how long will the pilot last? A min. 30 days is recommended)**
    2. **Goals/Metrics (what will define success for your pilot)?**
    3. **Test plan (what activities will you ask your pilot users to validate?)**
    4. **Feedback (how will you gather insights?)**

**For your broader rollout:**

* + **What is your plan/cadence for implementing a teamwork strategy organization-wide?** There is no one “right way” to implement a new strategy. You could rollout by department, by location, by core personas/people or by project. We recommend starting small to build excitement and momentum, expanding over time. This is a great place to leverage the department leads you identified as part your implementation team, as they can help get a teamwork strategy started in their immediate workgroups.

**Operations**: It can be easy to fall back to old ways of working, even if they were painful. Formalize an operational plan to monitor usage of the various teamwork apps, check in with users, and plan for additional phases (if your scope was limited)

* + **Who will track and report out on success against your defined goals? How often?**
  + **What is your mitigation plan if your goals are not met?**
  + **How will you enable a feedback loop with your end-users - both to capture insights as well as gather success stories?**
  + **What is the plan for implementing additional teamwork apps?** Tip – you could simply repeat this implementation framework as needed.