

Need to Know Microsoft 365 Webinar March 2024

@directorcia

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Agenda

- Microsoft 365 Update
- Microsoft Forms
- Q & A



Microsoft 365 Update

News

- Microsoft Copilot for Security is generally available on April 1, 2024, with new capabilities
 - <https://www.microsoft.com/en-us/security/blog/2024/03/13/microsoft-copilot-for-security-is-generally-available-on-april-1-2024-with-new-capabilities/>
- Seamless secure your data
 - <https://techcommunity.microsoft.com/t5/security-compliance-and-identity/seamlessly-secure-your-data-estate-with-microsoft-purview/ba-p/4095930>
- Introducing Microsoft Surface Pro 10 and Surface Laptop 6 for Business
 - <https://www.youtube.com/watch?v=uxHn2DMigb4>
- The new Planner in Teams is now in Public Preview
 - <https://techcommunity.microsoft.com/t5/planner-blog/the-new-planner-in-teams-is-now-in-public-preview/ba-p/4072525>
- Introducing Microsoft Security Exposure Management
 - <https://techcommunity.microsoft.com/t5/security-compliance-and-identity/introducing-microsoft-security-exposure-management/ba-p/4080907>

Microsoft Forms



Microsoft Forms

Collect better data, gain better insights, drive better action



Best User Experience
for end users and admins



Seamless Integration
with your apps and data



Powered by AI
to do the heavy lifting for you



Collect better data

Ask great questions to the right people

- Simple UX design
- Smart recommendations
- Collaborate across teams

The screenshot shows the Microsoft Forms application interface on a laptop screen. The title bar at the top of the window reads "Forms" and "Event Feedback Survey - Saved". On the right side of the title bar are icons for "Preview", "Theme", "Share", and a user profile. The main content area is divided into two tabs: "Questions" (active) and "Responses". Under the "Questions" tab, there is a form titled "Event Feedback Survey" with a description field. Below the form, a toolbar contains icons for adding questions: Choice (selected), Text, Rating, Date, and a dropdown menu. A section titled "Recommended from Microsoft Forms templates" lists several survey questions with their respective question types indicated by icons on the right:

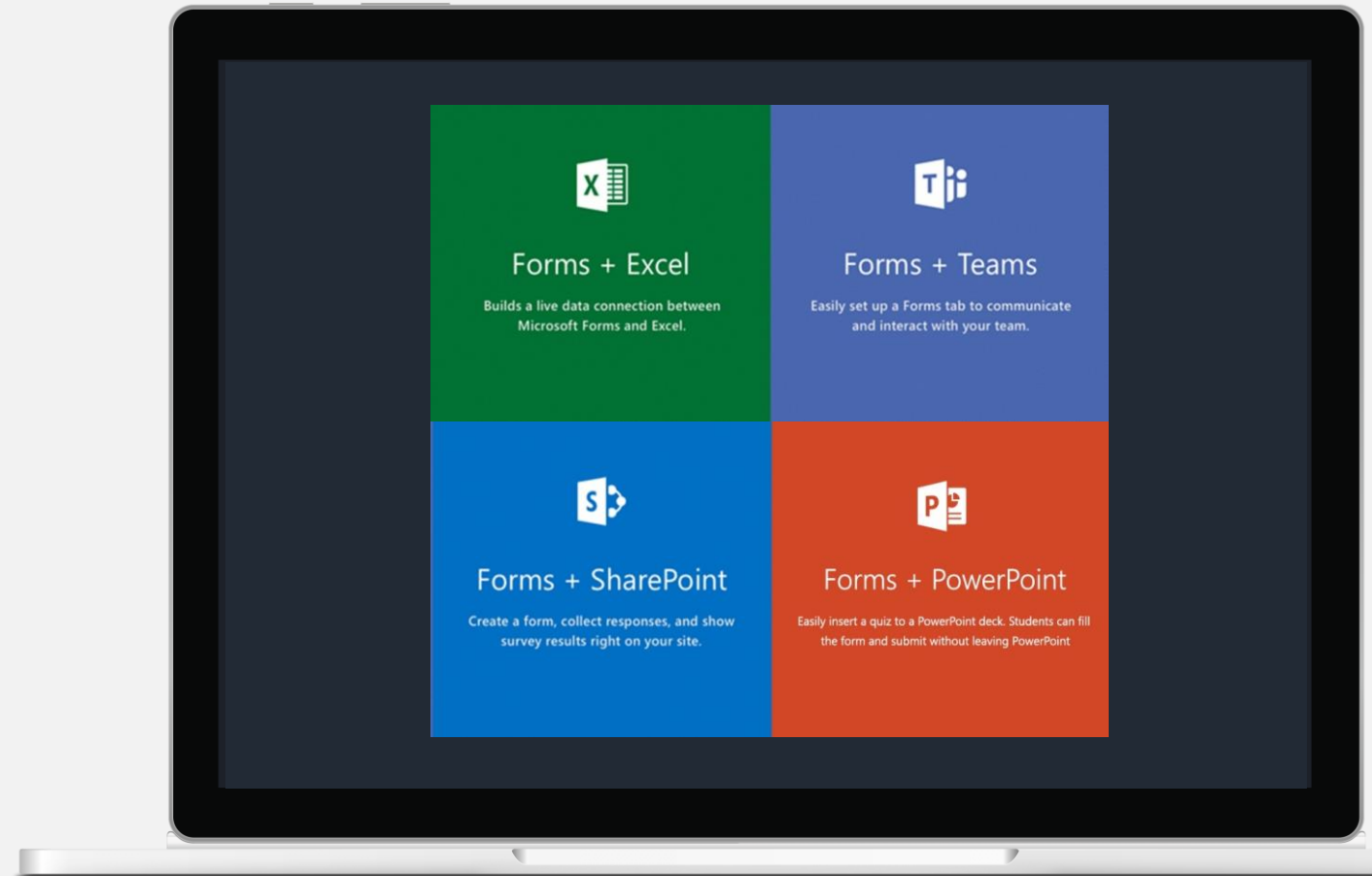
- Overall, how satisfied were you with the event? (Choice icon)
- Please rate your satisfaction level with the following aspects of our event. (Table icon)
- Was this your first time to attend one of our events? (Choice icon)
- How friendly was the staff? (Choice icon)
- How likely are you to recommend this event to a friend or colleague? (Rating icon)
- Do you have any suggestions for us to improve future events? (Text icon)

At the bottom of the recommended list, there are two radio buttons for selection.

Gain better insights

- Respondents get started from a familiar place
- Works from any web browser and any device
- Multi-lingual support

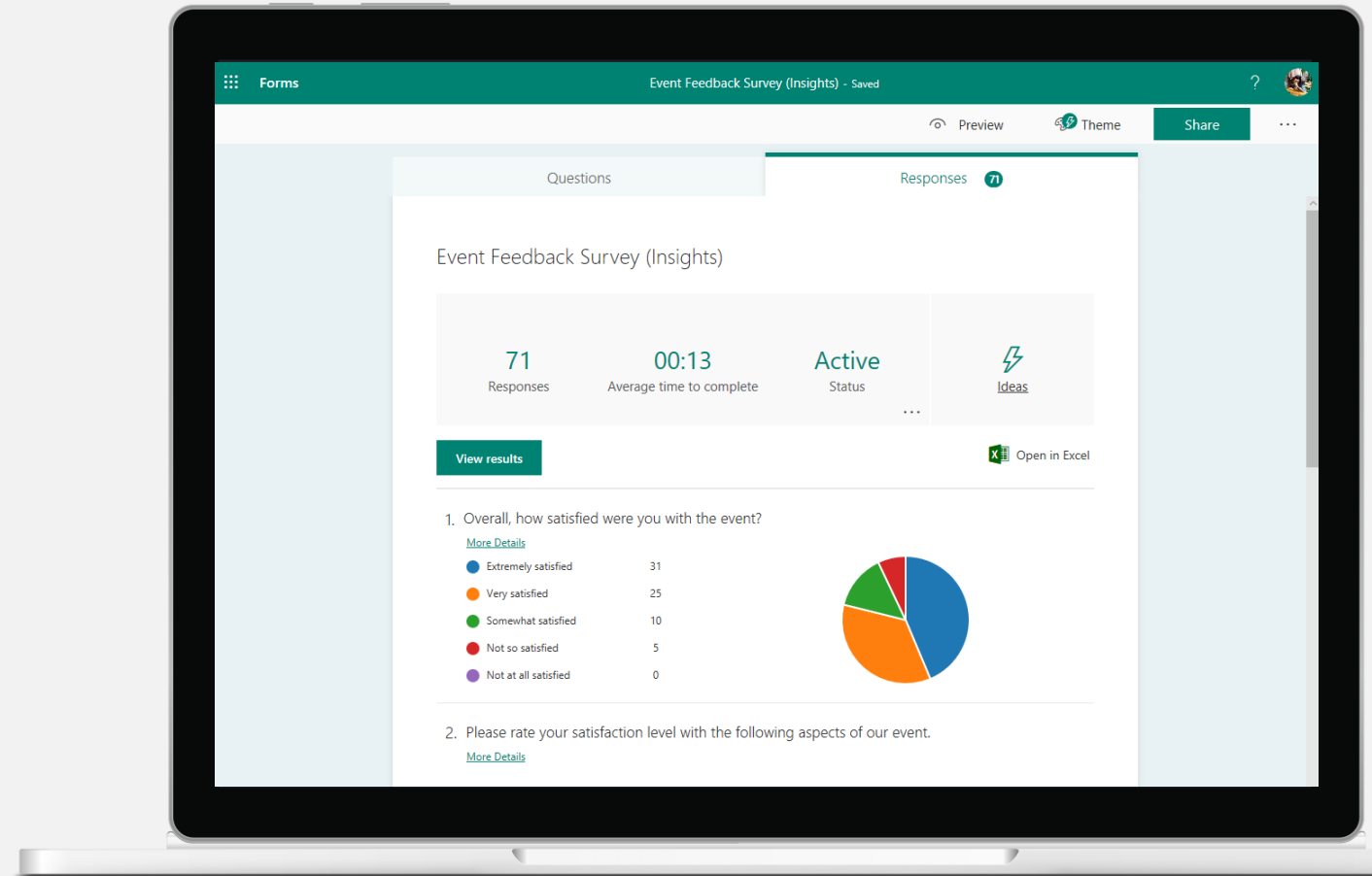
Improve response rate and survey reach



Drive better action

Powerful analysis with data visualization

- Real-time responses and quick data analysis
- Export to excel
- Data insight by Forms Ideas



Best User Experience

For admins and end users

- Ownership transfer
- External sharing control
- Auditing*
- Admin dashboard *
- IP – eDiscovery ** DLP **
- IP – Hold & retention **

-
- Email receipt
 - Section
 - Multi - lingual support
 - Mobile experience for the designer
 - File upload *

Gain better insights

improve the response rate and survey reach

- Outlook - quick poll
- PowerPoint & Stream - quiz in video
- Teams – Poll improvement *
- Office mobile apps – mobile integration **

Powered by AI

to do the heavy lifting for you

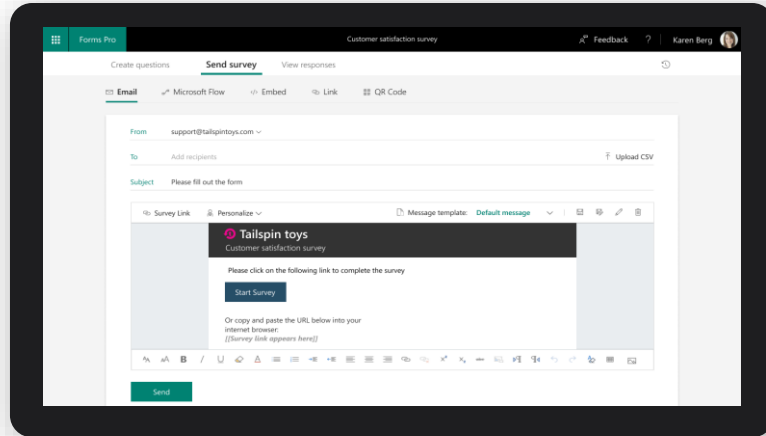
- Recommend Theme
- Recommend Content – keep iterating
- Recommend survey based on calendar **

* coming soon

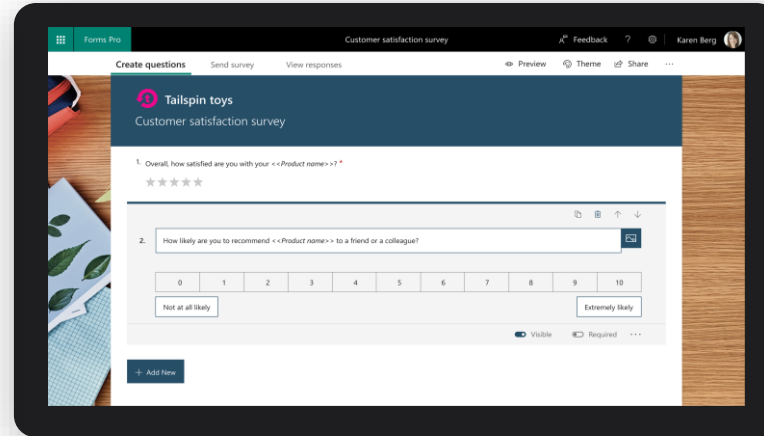
** working on

Microsoft Forms Pro

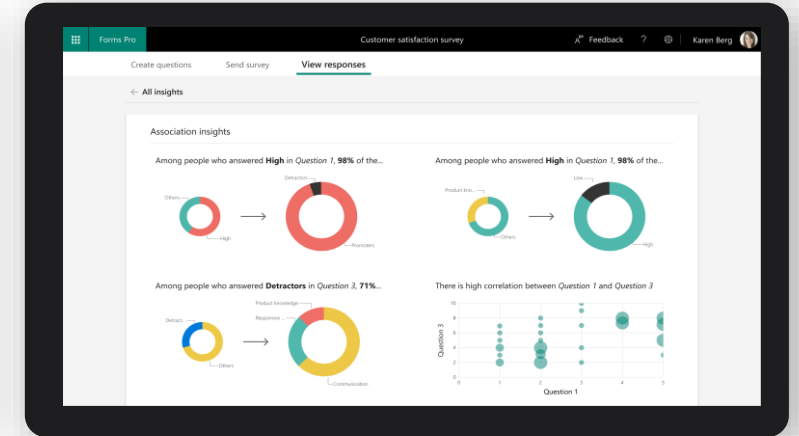
Simple, yet robust survey solution



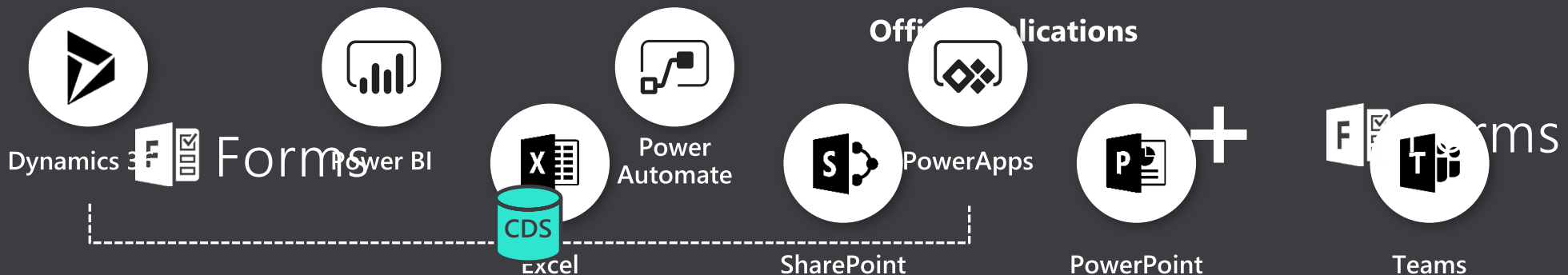
Simplified surveys



Seamless integration



Real-time insights

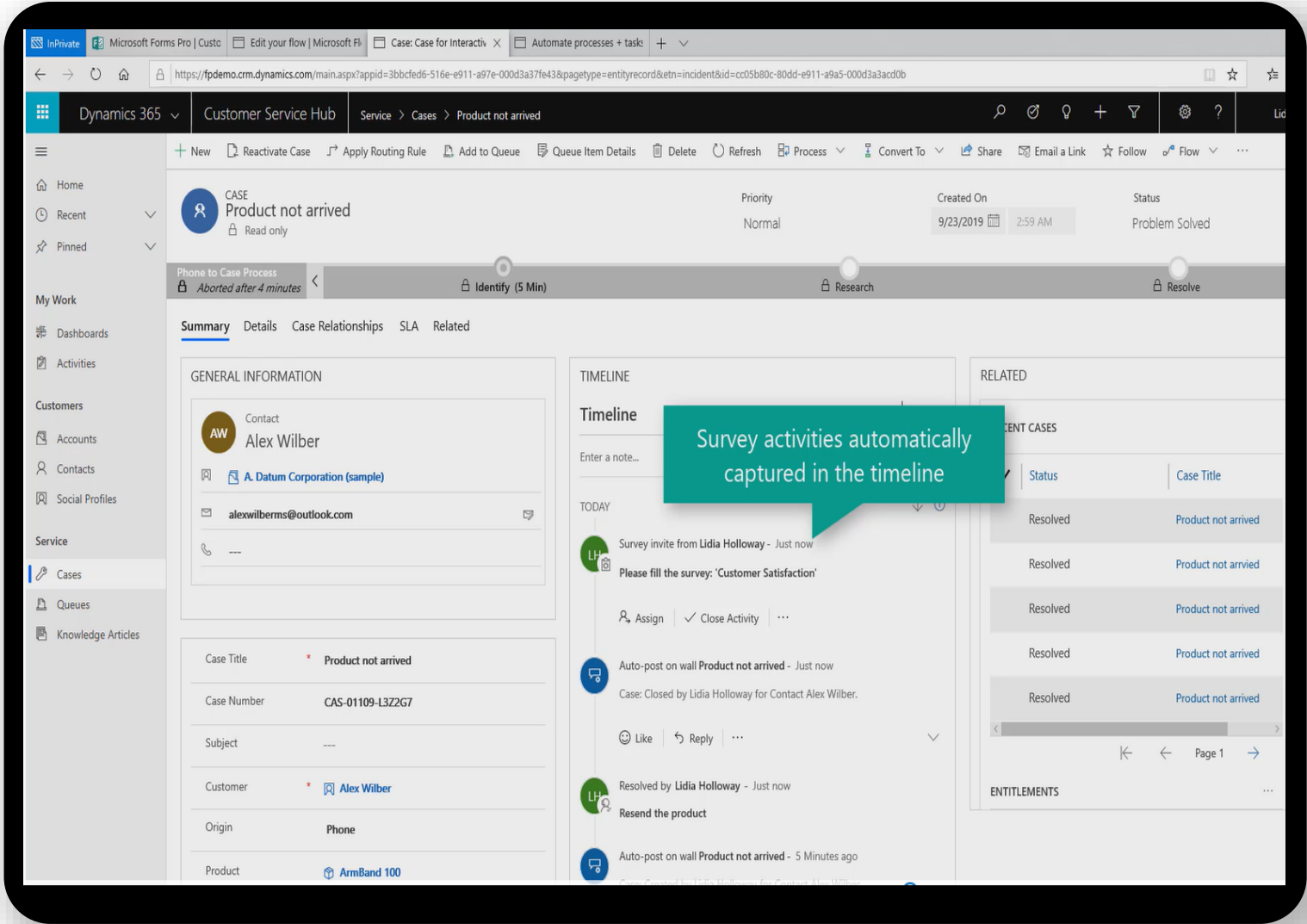


Integration with core business applications

Survey responses in D365

Comprehensive view of the survey when viewing the survey response from the Dynamics 365.

The view includes sentiment, Net Promoter Score (NPS), and all questions and corresponding responses on the main form.



Survey solutions for every need



BUSINESS NEED

Microsoft Forms

For fast, web-based surveys

Easily create data collection forms and quizzes online

Forms Pro

For an end-to-end solution, with analytics and CRM integration

Integrate survey responses with business application data
Automatically send survey based on business transaction events
Automatically include user context as part of embedded survey response



USE CASES

Quick surveys, quizzes, and pulse checks with basic reporting

Surveys that require trigger-based branching logic, highly customized branded surveys, survey response data that needs to be integrated with business data via Dynamics 365



USAGE SCENARIOS

Event Planning, Collaboration, and Evaluation

Customer Satisfaction survey, Product feedback, Employee engagement, Pre- and Post-Sale feedback



USERS / PERSONA TARGETS

Information workers

Customer Success Teams
Marketing / Market Research
Customer Service and Sales Teams
Product and Engineering Teams
Business Leaders and HR



MICROSOFT TECH IN USE

Microsoft Outlook, Microsoft Teams, Microsoft SharePoint, Microsoft PowerPoint, Microsoft Flow

Microsoft Dynamics 365, Microsoft Flow, Microsoft Power BI, Power Platform, Microsoft Office



AVAILABILITY

Included with your Office 365 license

Included with Dynamics 365 (2,000 responses per user per month)
Add-on for Office 365, Power Platform
Ability to purchase more responses

Demo

Resources

- Forms help and learning - <https://support.office.com/en-au/forms>
- Create a form with Microsoft Forms - <https://support.microsoft.com/en-us/office/create-a-form-with-microsoft-forms-4ffb64cc-7d5d-402f-b82e-b1d49418fd9d?ui=en-us&rs=en-us&ad=us>
- Share a Form to collaborate - <https://support.microsoft.com/en-us/office/share-a-form-to-collaborate-d5bb5cf0-8401-4c15-bb8c-8e108cd7e69b?ui=en-us&rs=en-us&ad=us>
- Set up Microsoft Forms - <https://support.microsoft.com/en-us/office/set-up-microsoft-forms-cc52287a-4550-464d-9a1b-457bf9df2240?ui=en-us&rs=en-us&ad=us>
- Collaborate on Forms - <https://support.microsoft.com/en-us/office/work-with-colleagues-to-create-edit-and-review-forms-in-microsoft-teams-333b97a3-41d9-48bc-a1cb-84a96bd44e14?ui=en-us&rs=en-us&ad=us>
- Change the Form theme - <https://support.microsoft.com/en-ie/office/change-a-form-theme-895ca902-833b-4f56-9488-f36480d837ef>

CIAOPS Resources



- Blog – <http://blog.ciaops.com>
- Free Office 365, Azure video tutorials – <http://www.youtube.com/directorciaops>
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- CIAOPS Best Practices Github – <https://github.com/directorcia/bp>

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Questions

That's all folks!

Thanks for attending