



Microsoft Teams Phone Summit - Day 1 pm

# Adoption Change Management with Teams Phone Deployment

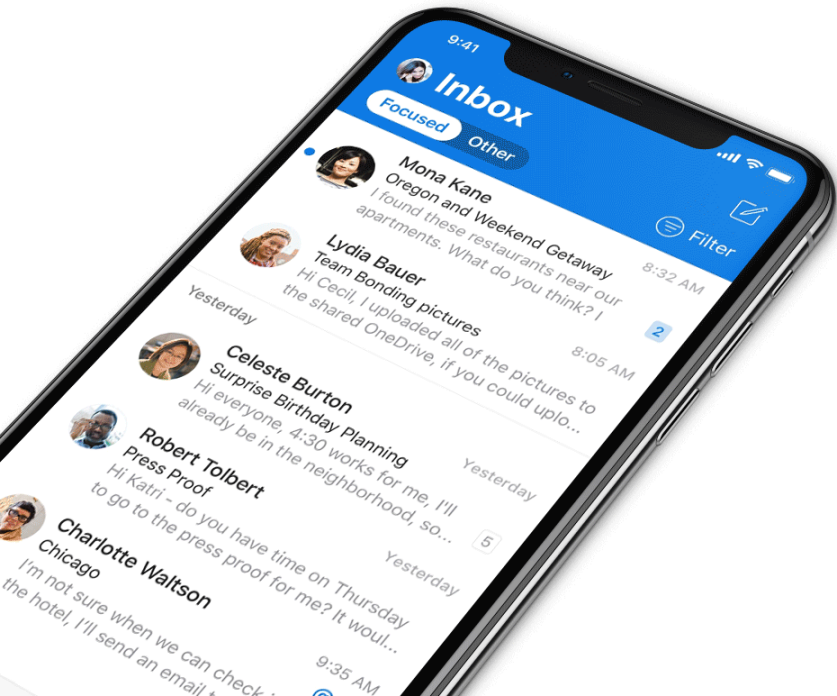
Lisa Rockenbach & Jeff Baart

# Digital Event Code of Conduct for Microsoft Webinars:

Microsoft's mission is to **empower every person and every organization on the planet to achieve more**. This includes all Microsoft events and gatherings, including on digital platforms, where we seek to create a respectful, friendly, fun and inclusive experience for all participants.

- We expect all digital event participants to uphold the principles of this Code of Conduct, which covers the main digital event and all related activities. We do not tolerate disruptive or disrespectful behavior, messages, images, or interactions by any party participant, in any form, at any aspect of the program including business and social activities, regardless of location.
- Microsoft will not tolerate harassment or discrimination based on age, ancestry, color, gender identity or expression, national origin, physical or mental disability, religion, sexual orientation, or any other characteristic protected by applicable local laws, regulations, and ordinances.

We encourage everyone to assist in creating a welcoming and safe environment.





We will mute your microphone for the first part of today's call



Ask your questions via chat, we will get to all of them, live or after. Common questions will get addressed out loud.



We will be posting all recordings to the Microsoft CommUnity Connection YouTube channel approximately 2-3 days after the session has finished. Subscribe here to get updates  
<https://www.youtube.com/@TeamsPhoneCommUnity>



# Teams Phone Summit Schedule

<b>Tuesday, March 5th</b>	<b>Wednesday, March 6</b>	<b>Thursday, March 7</b>
<b>10:00am – 11am EST</b> Teams Reporting and Analytics	<b>10:00am – 11am EST</b> Using Intune when Deploying Teams Phone Devices	<b>10:00am – 11am EST</b> Exploring AI Innovation in Teams Phone with Copilot and Teams Premium
<b>1:00pm – 2:00pm EST</b> Adoption Change Management with Teams Phone Deployment	<b>1:00pm – 2:00pm EST</b> Teams Phone Roadmap	<b>1:00pm – 2:00pm EST</b> Teams Phone Devices for your Organization

[aka.ms/TeamsPhoneSummitReg](https://aka.ms/TeamsPhoneSummitReg)



# Adoption Change Management with Teams Phone Deployment



Lisa Rockenbach – Customer  
Success Manager at Microsoft



Jeff Baart – Converged  
Comms CSM at Microsoft

Tuesday March 5<sup>th</sup>, 1 pm EST

# Agenda

1

What is Change Management?

2

Why Change Management?

3

ADKAR Model

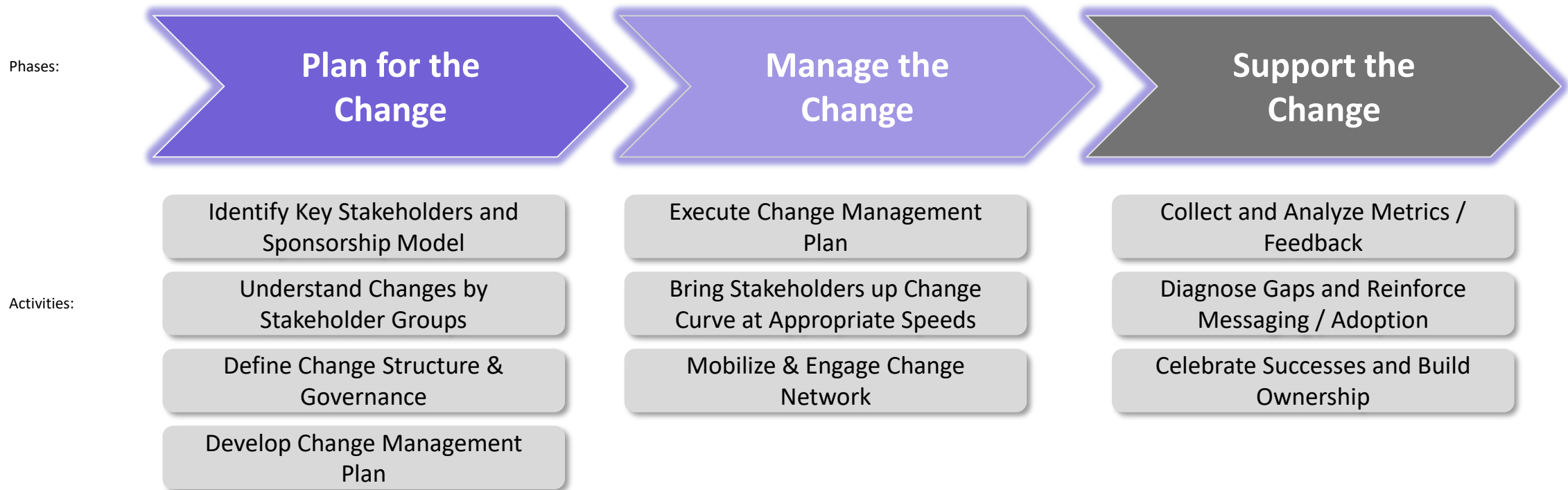
4

ADKAR In Action – Microsoft Teams Phone

# What is Change Management?

Change Management is a discipline for effectively managing business change. Its goal is to ensure that individuals (PEOPLE) receive the support they need to prepare them to respond positively to the change and continue to fulfill their roles and responsibilities.

Change Management optimizes the return on investment (ROI) of a program by ensuring the audience is **aware**, **aligned**, **capable** and **ready** for a new way of doing business.



# Why Is Change Management Important?

With Change Management

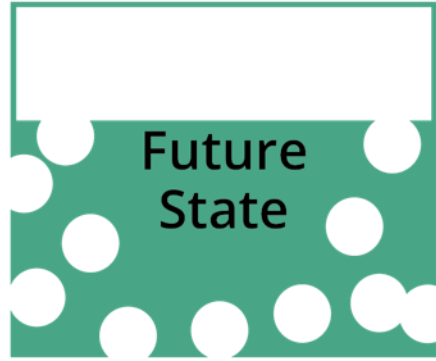


Without Change Management

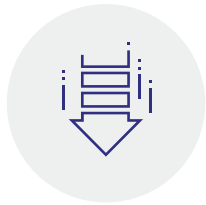




# Consequences of the “Swiss Cheese Future State”



Instead of



Lower  
ROI



History of Failed  
Changes



Unachieved  
Improvement



Not What We  
Expected/  
Hoped For

# Roles required to achieve success

		Role	Responsibilities	Department
Key roles	★	Executive sponsor	Communicate high-level vision and values of Microsoft to the company	Executive leadership
	★	Success owner	Ensure the business goals are realized for a Microsoft 365 roll-out	Any department
	★	Champions	Help evangelize Microsoft 365 and deal with objections from end users	All department (Staff)
	★	Change Manager	Develops adoption strategy and plan along with coordinating other key suggested roles for plan contributions and implementation.	Any department
	★	Project manager	Oversee the entire Microsoft 365 launch and roll-out process	Project management
	★	Training lead	Manage the training program and resources for your Microsoft 365 roll-out	IT and HR
	★	Communication lead	Oversee company-wide communications about Microsoft 365	IT and corporate communications

# Stakeholders

---

## Executive sponsors

- Identify and prioritize business scenarios
- Act as sponsor and face to the program
- Use the technology to model how employees can use it

## Success Owner

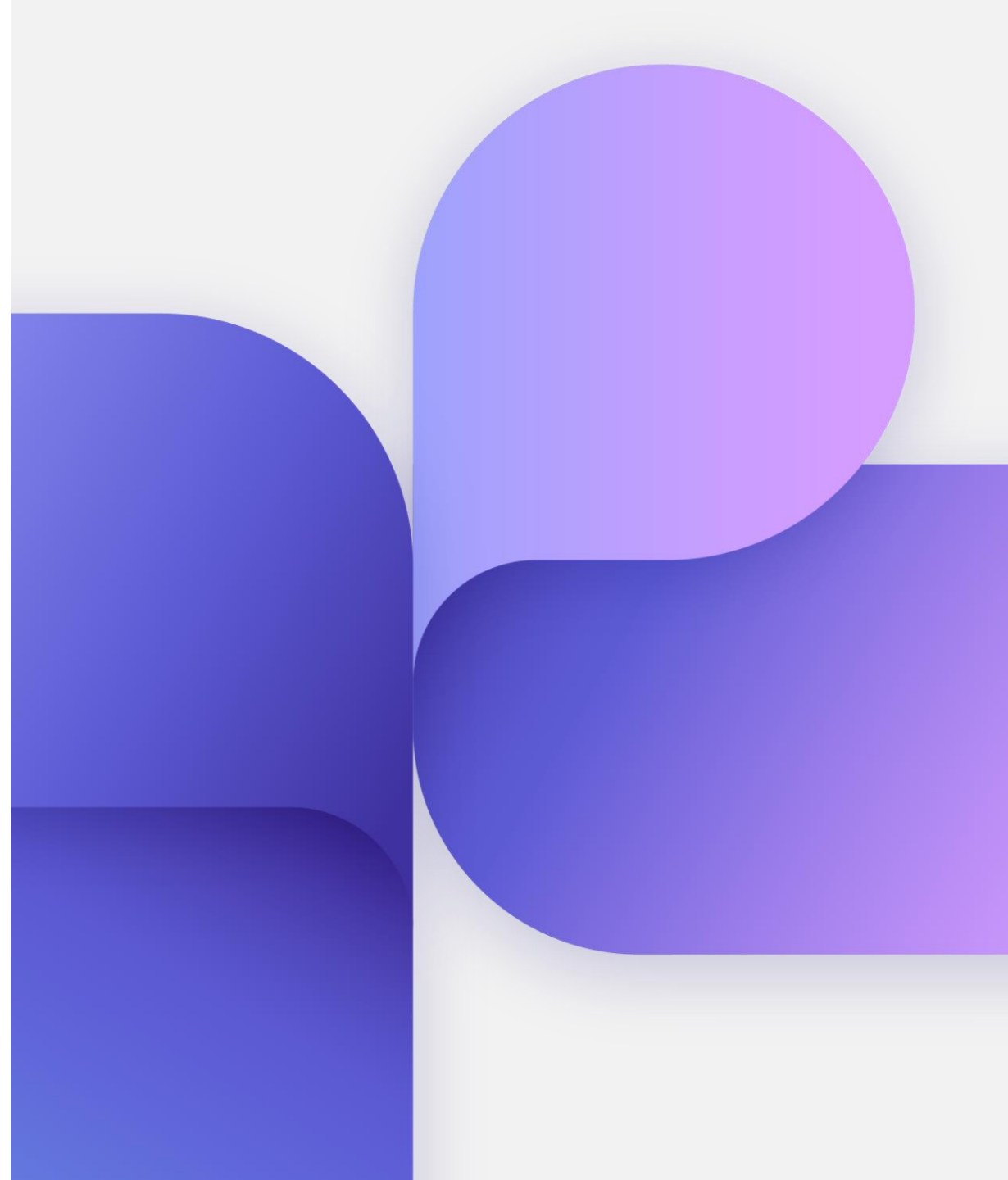
- Ensure business goals set for Microsoft 365 are realized
- Drive end user adoption

## Champions

- Scale adoption efforts across the organization
- Evangelize Microsoft 365 and its value across teams
- Welcome new users and answer questions



# ADKAR Model



# What is ADKAR?



Prosci's model for individual change

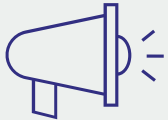
ADKAR represents the five elements of change that must be achieved for the change to be a success.

ADKAR is an effective tool for managing change at an individual level and guides activities at an organizational level.

# ADKAR Model on a Page

ADKAR element	Definition	What you hear	Triggers for building
<b>A</b> Awareness	Of the need for change	"I understand why..."	Why? Why now? What if we don't?
<b>D</b> Desire	To participate and support the change	"I have decided to..."	WIIFM Personal motivators Organizational motivators
<b>K</b> Knowledge	On how to change	"I know how to..."	Within context (after A&D) Need to know <i>during</i> Need to know <i>after</i>
<b>A</b> Ability	To implement required skills and behaviors	"I am able to..."	Size of the K-A gaps Barriers/capacity Practice/coaching
<b>R</b> Reinforcement	To sustain the change	"I will continue to..."	Mechanisms Measurements Sustainment

# Consequences of Missing ADKAR Elements



**Without Awareness and Desire  
you will see:**

- Employees asking the same questions over and over
  - Lower productivity and higher turnover
  - Hoarding of resources and information
  - Delays in implementation
- 



**Without Knowledge and Ability  
you will see:**

- Lower utilization or incorrect usage of new systems
  - Employees worry whether they can be successful in the future
  - Greater impact on customers and partners
  - Sustained reduction in productivity
- 



**Without Reinforcement  
you will see:**

- Employees revert back to old ways of doing work
- Ultimate utilization is less than anticipated
- The organization creates a history of poorly managed change



# People Change at Different Paces

Awareness    Desire    Knowledge    Ability    Reinforcement



Kavita



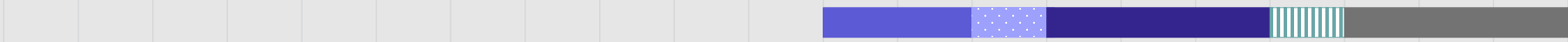
Rahim



Grace



Alana



Eric





# ADKAR In Action | Teams Phone

## Scenario:

Contoso Org is selling 80% of office space and moving to flex work (2 days in office 3 days WFH) by Jan 2025.

They will retire their legacy phone system and will be deploying Teams Phone to enable users to work from anywhere.

10,000 users with an E5 License.

IT has completed Teams Phone Operator Connect set up and POC.  
They are now ready for scaled adoption

[Home](#) / [Microsoft Teams](#) / Microsoft Teams Phone

# Microsoft Teams Phone Adoption

Teams Phone, the smart calling solution for Teams.

[Download the Teams Phone overview >](#)



## Adoption guide

Designed to help you roll out Teams Phone and accelerate adoption.

[View guide >](#)

## Help Desk guide

Designed to support your IT Help Desk assist users with Teams Phone tasks.

[View guide >](#)

## Training videos

These bite-size videos help you quickly get the most from Teams Phone.

[Watch now >](#)



## "At a glance" guides

Was Teams Phone designed for everyone? Absolutely. But different roles may use different Teams Phone features throughout the day. Reference the following guides for the corresponding stakeholders you support.

[↓ Download all](#)

[Customer Facing Information Workers >](#)

[Executive Assistants >](#)

[Executives >](#)

# Executive Sponsor, Champions, Timing & Goals

## Executive Sponsor



**Ravindra Bhangale**  
CEO

## East Coast



**Angel Aviles**

## West Coast



**Scotty Bingham**

## Midwest



**Lisa Rockenbach**

## EMEA



**Ryan McKinney**

## APAC



**Grant Oliasani**

## **TIMING & GOALS**

### **January:**

Assemble team/ Plan goals

### **February:**

Exec Sponsor send agencywide comms. Clear agency goals.  
Set the stage

### **March:**

Migration begins. Weekly waterfall comms, training & office hours

### **April:**

Phase 2 migration. Weekly waterfall comms, training & office hours

### **May:**

Phase 3 migration. Weekly waterfall comms, training & office hours

### **June:**

Phase 4 migration. Weekly waterfall comms, training & office hours

### **July:**

Phase 5 migration. Weekly waterfall comms, training & office hours

**100% users migrated by 8/30**

# Executive Sponsor Expectations: Active & Visible Participation

---

Action	Description
Determine migration start and completion date	Set hard date to for project start and 100% completion.
Company-wide Communication	<ul style="list-style-type: none"><li>• Kickoff email before project begins "what to expect".</li><li>• Ongoing (weekly) communication to end users. Emphasis on reason for change, project status, training resources and support available.</li><li>• Include as topic in company All hands</li></ul>
Share with your leadership team	Share project goals, status and reporting. Expectations regarding waterfall comms and Champions.

# Champions Expectations

Action	Description	Date	Estimate time/week
Waterfall Comms	Waterfall comms to depts/teams. Coordinate with your dept leader & their leadership team. Emphasis on change, and how you will be supporting the team	Weekly	15 mins
Teams Phone Training	<ul style="list-style-type: none"><li>Champions assigned to lead at least 1 training</li><li>Share weekly training schedule for dept in waterfall comms</li></ul>	1/month	Host only ONE 30 min training
Teams Phone Office Hours	<ul style="list-style-type: none"><li>Champion assigned at least 1 Office Hours</li><li>Share weekly Office Hours schedule with dept in waterfall comms</li></ul>	1/ month	Host only ONE 30 mins office hour
Share feedback from the field with Champions group	Share feedback you are hearing from field / user experience during weekly Champions call or within Team	Weekly	30 mins

# Communication Plan

- Awareness
- Desire
- Knowledge

# Call for Champions Template

Department leaders send email to dept or share with their leadership team to send out to find champions

## Clarity is kindness!

Be clear on time commitment

What is in it for them!

Leadership exposure

Stretch project

Hi (Insert Team)!

Exciting news- we are launching Teams Phones June 1st, 2023 – which help will help drive our digital workforce forward! We have an opportunity for YOU to join the Teams Phones V-Team to help make our roll out a success on June 1st.

What's in it for you? A lot!

- \* Visibility with leadership on an initiative that will positively impact our entire workforce
- \* Opportunities to grow your personal and professional development activities that you can highlight in your annual review.
- \* Planning and leadership responsibilities to help us achieve a successful roll out
- \* Networking opportunities with other champions across other teams/departments

We're looking for specific people who have the following skills, or are looking for a stretch project in the following areas:

- \* Communication planning
- \* Training and weekly office hours
- \* Tracking adoption numbers

Your time commitment will be (about): 1-3 hours per week

- \* Champions Weekly Office Hours: Attend 30 min weekly call with the Champions V-Team. This call we will go over latest adoption numbers, action items for the week, Q&A, etc
- \* Host 30 Min Office Hours for Your Team Weekly: Host standing office hours weekly for your team to ask question and prepare for the hard transition to Teams Phones on June 1st.
- \* Communication Planning & Execution: 30 minutes weekly. Work with your leadership on waterfall communication which will go out weekly.
- \* Other: 30min- 1 hour for other tasks or follows ups that may arise

Please get approval from your manager and little 'r' if you are interested. We're looking to finalize our Teams Phones Champions V-Team by 4/25/23 and would love to have you!

Thanks!



# Company-wide Communication

Exec Sponsor send weekly comms via email & Viva every MONDAY throughout March

## Waterfall Comms Sequence:

Exec Sponsor > Department leaders > Managers

(This repetition of communication will help reinforce the change and ensure to cut through the “noise” in our inboxes and get employees attention)

## Comms should include:

- Countdown to Change
- Upcoming Training
- Upcoming Office Hours



## Microsoft Teams Phone

A flexible, cloud-based calling platform that lets you stay in touch and get more done anywhere.



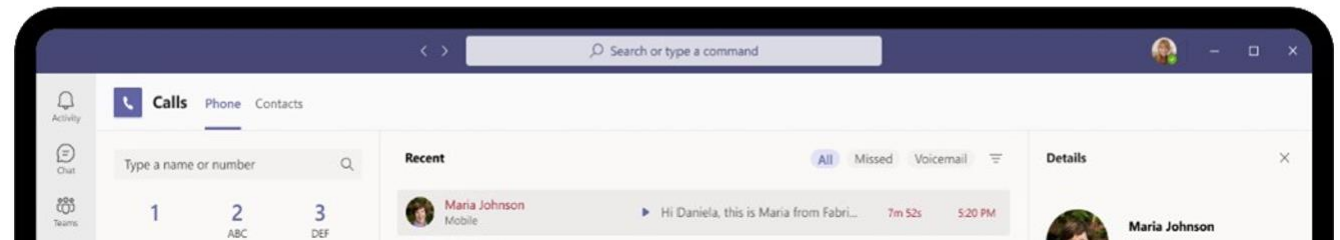
We are very pleased to announce that **[insert your company's name]** is launching Microsoft Teams Phone. This modern calling solution gives you all the convenience of calls without disrupting the flow of your work.

**The good news is that it's easy.** Teams meetings and one-click voice and video calls don't change. But now, you'll get a variety of new capabilities. With Teams Phone, you can call landlines and mobile phones from Teams—and receive them too. Transfer and delegate calls, or place them on hold. You can even switch calls between Teams on your desktop and Teams on your mobile device.

Ready to get started? Go ahead and explore calling with Teams Phone!

## Access your calls

When you select **Calls** from the left menu in the Teams app, you'll see a great new interface that puts your contacts and calling history front and center.



# Posters

Hang posters around offices or pass out desk drops to create excitement/buzz about the upcoming change!

Include upcoming trainings, office hours, etc so employees know where they can access additional resources



## Microsoft Teams Phone: A better calling experience



Call external phone numbers with the same ease as internal contacts

Seamlessly shift from Teams on your desktop to Teams on your phone



Enhance productivity by using features like transfers, holds, voicemail transcriptions, and more

## Learn what you can do with Microsoft Teams Phone

### Training

<If available, add links to your organization's internal training resources.>

### Community

<Add links to your Office 365 communities or Yammer groups.>

### Events

<Tell people about your upcoming Microsoft Teams Phone events. For example, "Join our weekly lunch and learn every Monday at noon in the cafeteria.">

Your logo here

# Training

- Knowledge
- Ability

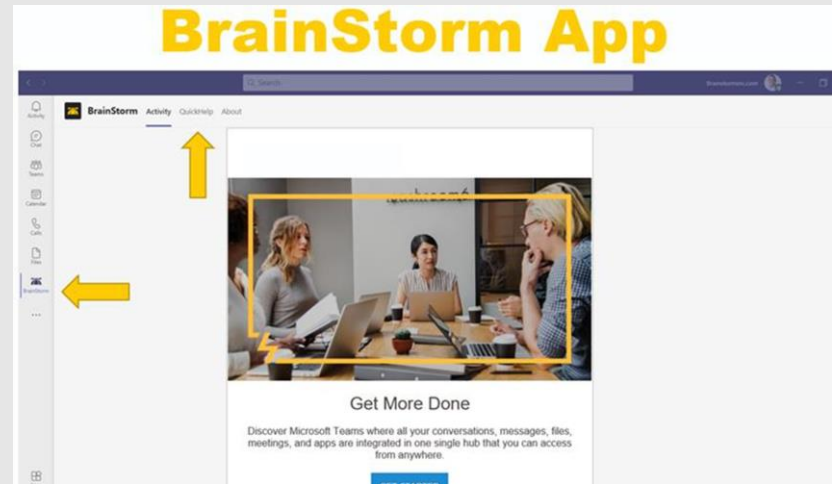
# Training Resources



## On Demand Resources

[Get Started With Teams Phone](#)  
[Live & On Demand training](#)  
[Streamline End User Training](#)

**\*\*To be included in comms**



## Partner Resources & Trials

BrainStorm Inc. – Up to 90 Days POC

- Hybrid work
- Teams meetings & Telephony



## Champion Led

Weekly 30-minute live training  
led by a Champion

# Measuring Success

## - Reinforcement

# Measurements of Success



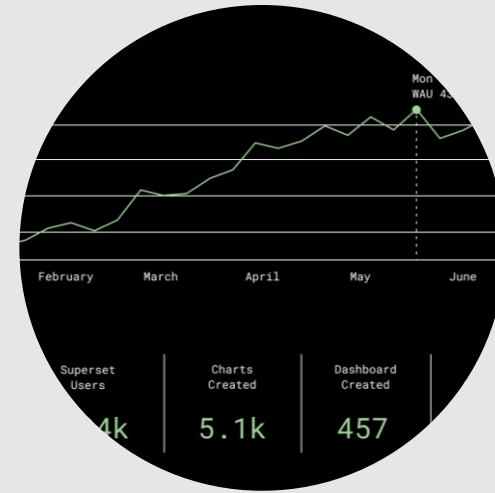
## Organization Goals Achieved

- Cost Savings?
- Flex Work?



## Analytics

- End User Adoption















## User Feedback

- Gathered in weekly Office Hours
  - Survey

# March

## 2024

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
					1	2
3	Weekly Comms. Waterfall from dept leaders. 	4	5	6	7	8
			Teams Phones training @1pm 	Office Hours @4pm 		9
10	Weekly Comms. Waterfall from dept leaders. 	11	12	13	14	15
			Teams Phones training @1pm 	Office Hours @4pm 		16
17	Weekly Comms. Waterfall from dept leaders. 	18	19	20	21	22
			Teams Phones training @1pm 	Office Hours @4pm 		23
24	Weekly Comms. Waterfall from dept leaders. 	25	26	27	28	29
			Teams Phones training @1pm 	Office Hours @4pm 		30
31						



=Communication



=Training



=Office Hours



# Adoption Resources

## Microsoft Account Team Resources

- **Converged Communications Customer Success Manager**
- **Customer Success Account Manager**
- **Cloud Solution Architect**
- **Account Technology Strategist**

## Training Videos

- [Get Started With Teams Phone](#)
- [Live & On Demand training](#)
- [Streamline End User Training](#)

## IT Resources

- [HelpDesk Guide](#)
- [Admin Training](#)

## At A Glance Guides

- [Frontline Workers](#)
- [Executives](#)
- [Executive Assistants](#)

## Get Started Guides

- [Frontline Workers](#)
- [Executives](#)
- [Executive Assistants](#)

## Adoption Resources

- [Complete list](#)
- [Adoption Guide](#)

## Comms Templates

- [Email](#)
- [Poster](#)



# Q&A





# Event Giveaway

Giving away a prize pack for each session. Fill out a survey to be entered.

We will reach out after the Teams Phone Summit to the winners!

*If you are a government employee, please fill out the survey and indicate you are not eligible to participate.*

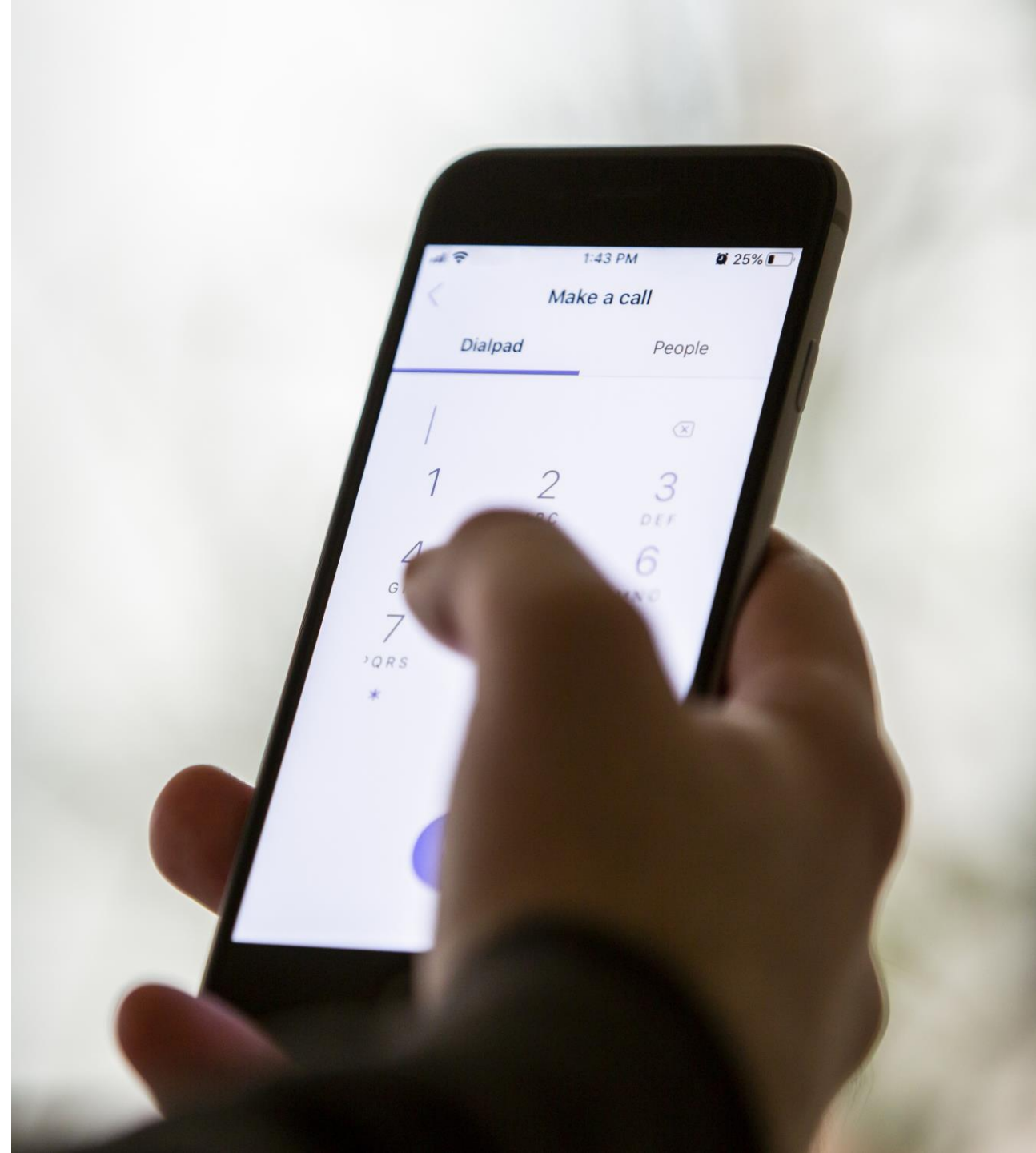






# Call to Action

- Need a more technical conversation on Teams Phone?
  - Set up a meeting with your Microsoft Account Teams or partner
- Teams Phone POC/Pilot
  - Let's talk about how we can help you with a POC and/or Pilot
- Interested in reducing your IT spend, simply administration and support your users
  - Let's talk about how Shared Calling is the right solution for you
- Let's get started -  
<https://aka.ms/TPSSurveyDay1PM>

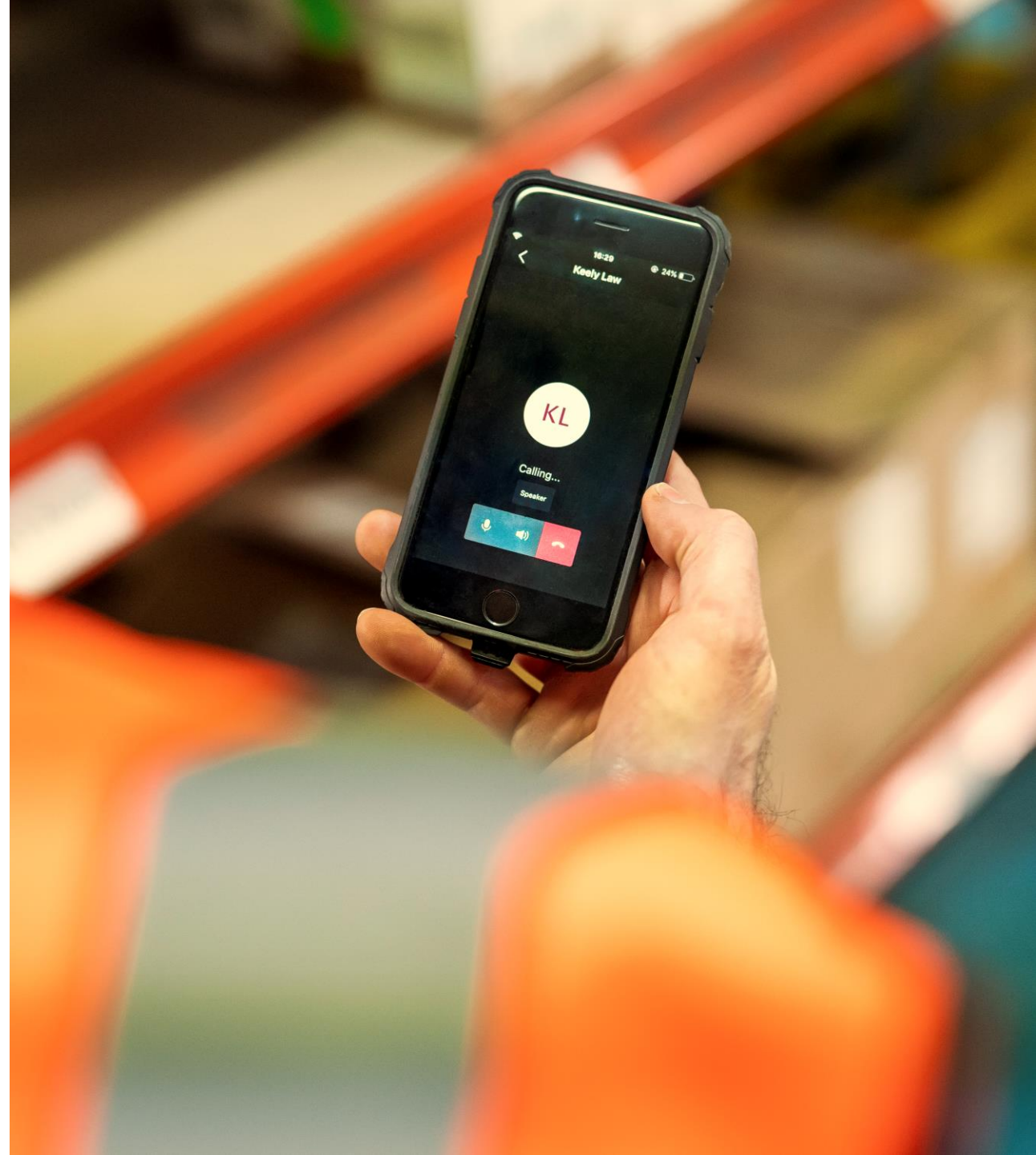




# We want your Feedback!

- Let us know how we did
- Do you need any help with Teams Phone?
- Register for the giveaway

<https://aka.ms/TPSSurveyDay1PM>





Thank you for attending!!

Adoption Change Management with Teams  
Phone Deployment