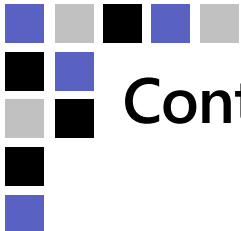




TEAMS SOLUTIONS FOR FRONTLINE

Workbook

Updated on 05 April 2021



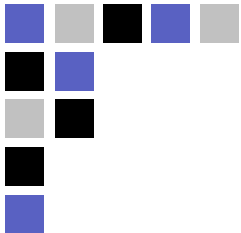
Contents and overview

This workbook is your companion to our Microsoft Teams for Frontline Workers Clinic.

We encourage you to leverage this workbook which is based on learnings and real-life insights providing the foundation for you to define, develop, and adopt solutions on Teams that benefit your Frontline Workers.

Clinic details and registration can be found at **aka.ms/TeamsFLW**

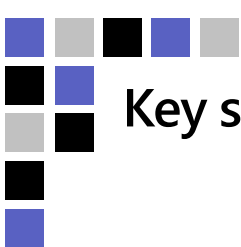
Section	Page(s)
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Journey to valuable Teams solutions Solution Framework Overview	5 – 7
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Use p. 4 in this section to reflect on the best practices and key success factors – is your project missing any?

Key success factors

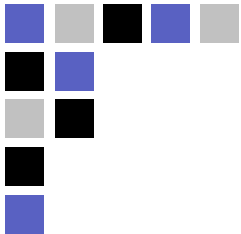
Best practices across high achieving customers



Key success factors

Reflections..

1. Put Frontline workers at the center
2. Focus on WHAT is needed by WHOM and WHY (before the HOW!)
3. Bring together project stakeholders across LOB, IT and Leadership
4. Include Frontline Managers as a core stakeholder
5. Map the WHY to the capabilities in Teams
6. Start simple for rapid time-to-value
7. Ensure FLW feedback is part of the pilot
8. Expand FLW solutions to drive evolving business outcomes



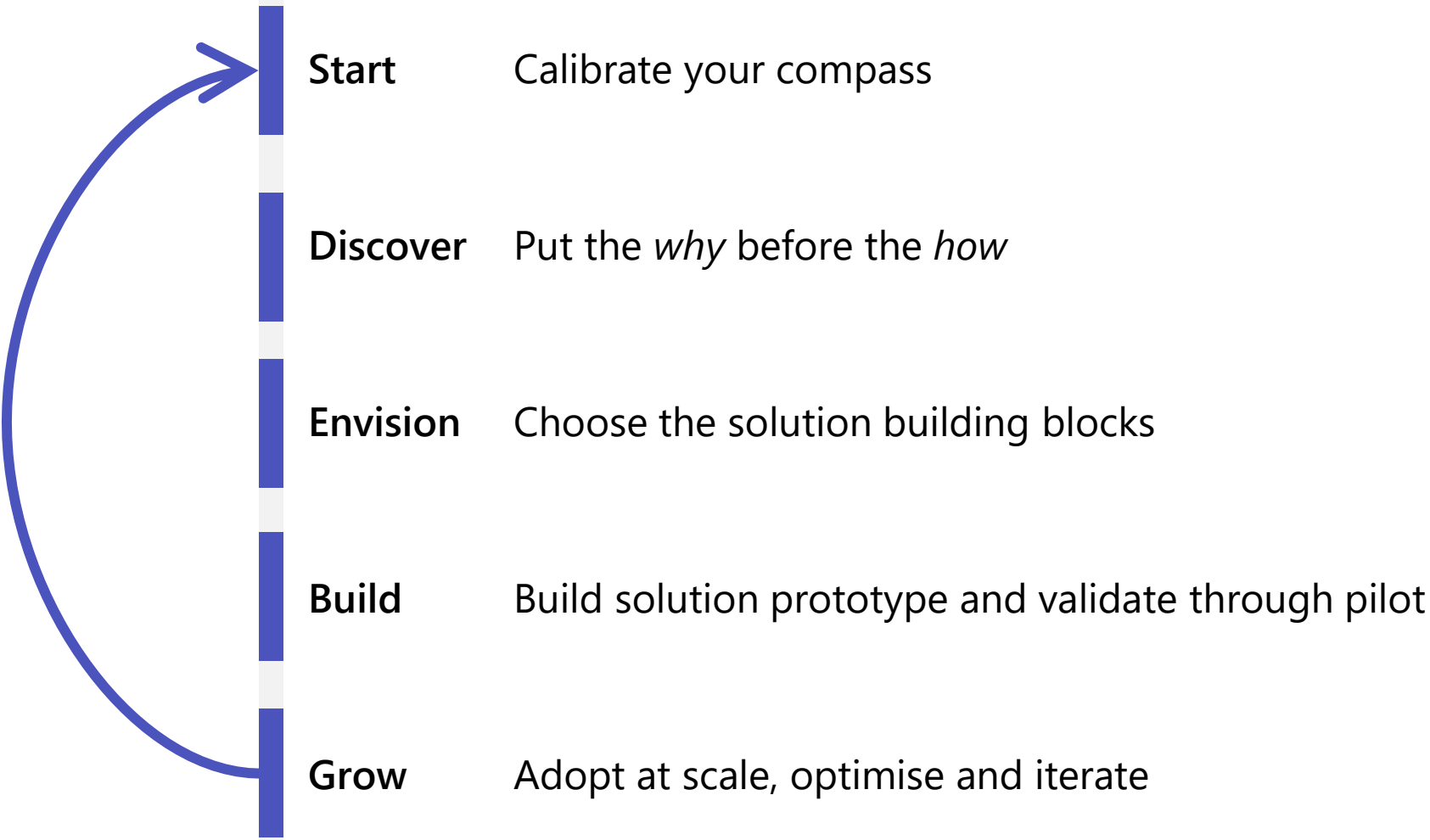
Familiarize yourself with the journey to valuable
Teams solutions for Frontline Workers

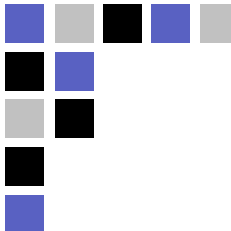
Journey to valuable Teams solutions

Solution Framework Overview



Journey to valuable Teams solutions





Legend

●

 Technical activities

●

 Adoption lead activities

●

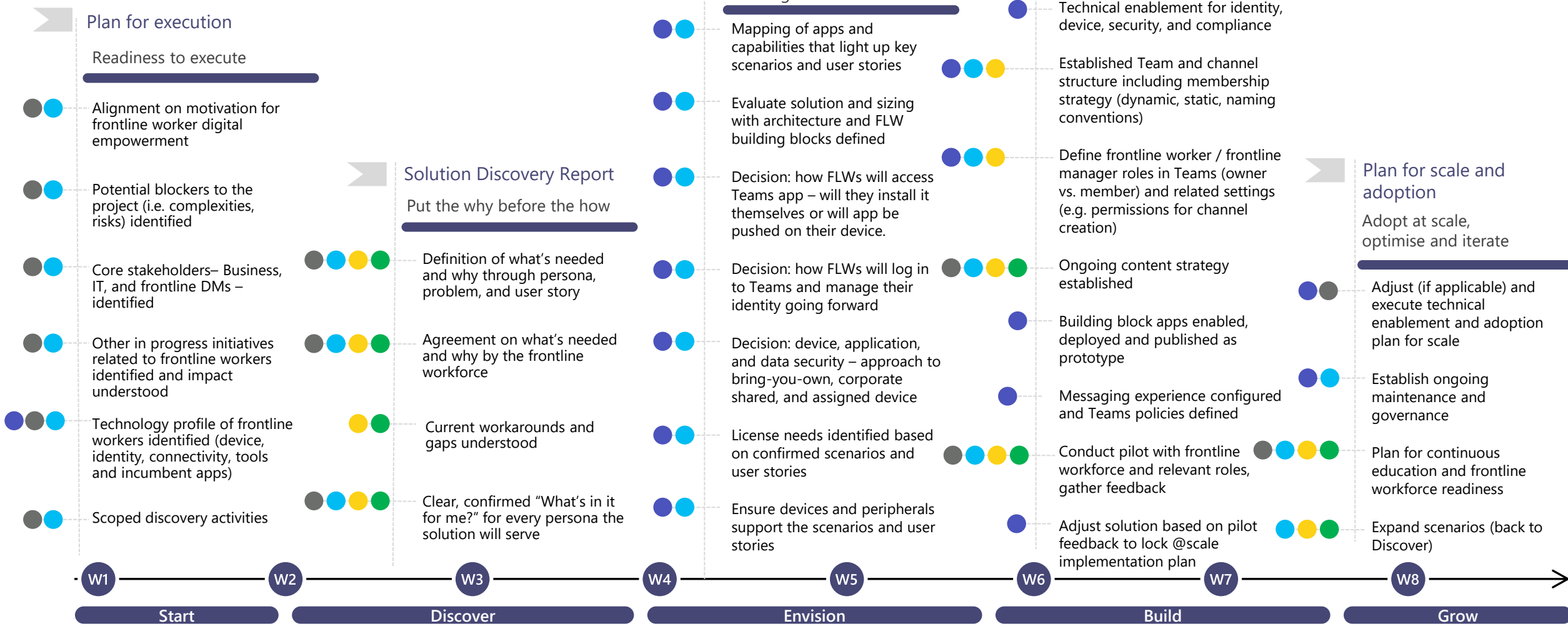
 Business stakeholder activities

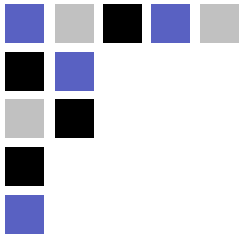
●

 Frontline manager activities

●

 Frontline worker activities





Use the questions in this section to reflect on the current ways of working and the status of key Frontline value areas.

Start

Calibrate your compass



What do your frontline role(s) need to communicate, and to whom do they communicate?

Who needs to communicate to your
frontline workers, and what do they
need to communicate?

How satisfied are your frontline workers with the communication tools they have?

Reflections..



Culture, wellbeing & engagement



Describe how your frontline workers engage with your mission and strategy?


How are you engaging with frontline workers?

Whose role it is to ensure that engagement is happening?

How do you recognize colleagues?

How do you measure and define engagement?

How would you describe the culture?

Reflections.. 



Scheduling & Cover management




Walk through how frontline workers and their managers manage their schedules now?

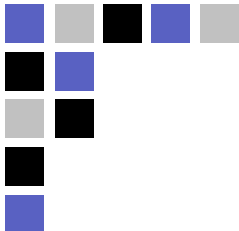
Describe the approval stages there are for the creation of the schedule?

How is leave managed?

Where does information about leave, holidays, pay, hours reside?

Describe the cover management process?

Reflections.. 



Training & onboarding



What is the training journey of a new employee? Of an employee that's been in service for a while?

Is there any mandatory training? How are competencies and development being tracked?

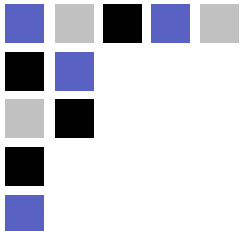
What is the new employee onboarding process?

How is knowledge currently transferred on the frontline?

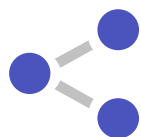
Reflections.. 

Grid area for reflections.





Connected tech ecosystem



Describe the technology landscape of your frontline workforce?

Describe the mission-critical tools and apps and processes they support? How frontline workers feature in this process?

What apps and tools frontline workers use day to day? How do they access these tools?

What technology investments you've made in frontline workers and describe how you see this changing and why?

Reflections..

Grid area for reflections and notes.





Productivity & process



How do you define productivity for your frontline workers?

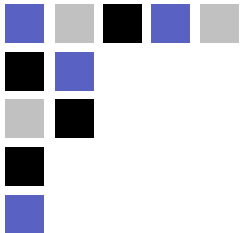
How do you keep on top of actions and track activities?

Are there are lot of paper and manual processes? What are they?

What information does your frontline workforce need to do its job well?

What information do frontline workers need to share or could potentially share with the wider organization?

Reflections.. 



- Use p. 16 to build on the previous section by reflecting on solutions that matter to your frontline
- Use p. 17 for general problem framing guidance and refer to:
 - p. 18 – 19 for guidance on scenario analysis
 - p. 20 for problem framing exercise
 - p. 21 for the 5 whys exercise
- Use p. 22 – 27 to build empathy for your Frontline workers through persona analysis

Discover

Putting the why before the how

Solutions that matter to Frontline Workers

For each key solution area, determine:

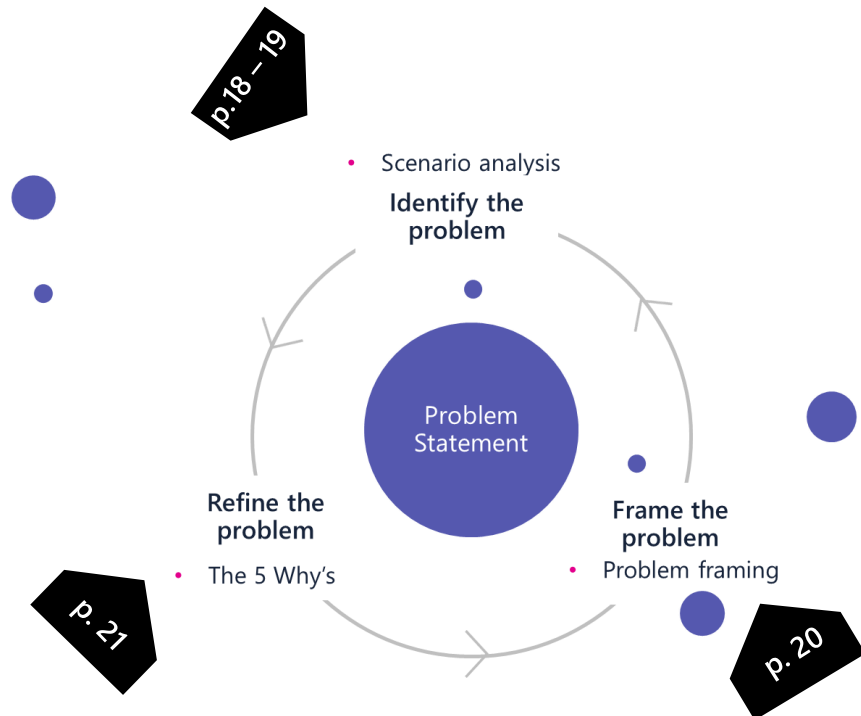
- How is this done now?
- What are the obstacles? What are the workarounds? What's the impact of this problem?
- How does this make frontline workers and other stakeholders feel?
- What benefits and value can you expect for the frontline worker, related stakeholders and business overall if a solution in this area is introduced?
- How will you measure success?



Reflections.. 

Activities to help articulate the problem that needs solving

- List out assumptions we're making about the user, the problems, the why it manifests – anything that we have discussed today
- List out any gaps in our knowledge and agree on how we'll close these gaps.



Reflections.. 



Identifying the problem

Purpose

Ideating and described a future through user stories.
Provide a narrative from the users' perspective of the desired state – the state where the problem doesn't present itself.

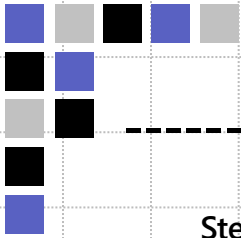
Instructions

1. For target frontline worker role **[user role]** identify top 3 -5 activities associated with their role. What do they do as part of their role and why they do what they do **[reason]**?
2. For each activity:
 - Identify the start and end point
 - Start breaking down into steps **[step]** and assess each step:
 - Who else is involved in each step?
 - What input is needed for each step?
 - What output is produced in each step?
 - How would you rate the step – think of pain points, rewards and perceived effectiveness of each step
 - What apps, tools and *things* are involved in each step?
3. Take the low scoring steps and write out the obstacles **[obstacle]** that prevent this step from being high-scoring, or at a high level identify key obstacles that prevent more effective step-to-step transition and describe how that obstacle makes the user feel **[negative feeling]**.

Put it all together for a problem statement that could read:

*A [user role]
trying to [step] but
[obstacle] because
[reason] which
make them feel
[negative feeling]*

You will end up with several statements. Try to see if there is a theme, a shared root cause.



Step

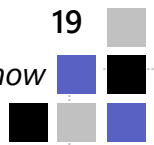
Who is involved?

Information Input

Information Output

How would you
rate this step?

Apps, Tools &
Forms





Framing the problem

Use the questions to help your thinking:

WHAT

- What is the nature of the problem?
- What are the symptoms of the problem?
- What tasks need to be accomplished?
- What pain points need to be relieved?
- Is it real/validated and supported by research?
- What's current issue that require attention?
- Spend some time on the **WHAT** and consider to running the 5 whys at this stage to ensure you have full clarity of the problem.

WHO

- Who actually has this problem?
- Who is experiencing the problem?
- Who is impacted by the problem?
- Have you validated that the problem is real for them?
- Who else may be involved?

WHY

- Why is the problem worth solving?
- Think of the impact of this problem on all the stakeholders and what would happen if we didn't solve the problem. What's the ultimate goal?

WHEN

- When does the problem arise?
- When do we need to solve it by?

WHERE

- Where does this problem arise?
- Where do we need to focus the most?
- What is the context in which the user experiences the problem?

HOW

- How does this problem manifest?
- How does it make the people impacted by this problem feel?
- How will we know when we solved it?

Reflections.. 



WHAT is the problem we are trying to solve? *What's the [initial ask]?*

WHY does this problem occur? This becomes your secondary what. *Why is / are / does [1st what]?*

WHY does this problem occur? *Why is / are / does [2nd what]?*

WHY does this problem occur? *Why is / are / does [3rd what]?*

Reflections.. 



Persona definition and analysis

Purpose

Define arch-typical users of the solution or user most impacted by problems that have been identified.

Create a shared understanding about the frontline workers' needs and challenges.

Enhance the quality of the solution.

Instructions

Step 1. List out all the users affected either by the problem or the potential solution we are building.

Step 2. Think about the profile of the personas on all the relevant users.

Step 3. Categorise the users into following:

- *Primary*– the main focus of the problem and solution
- *Secondary* – not the main focus of the problem or the solution but still a relevant user.
- *Served* – they are affected by the use of the solution but not the people using it.

Tip It's sometimes helpful to think about a negative persona who represents the opposite of the primary persona. They are an example of who our solution won't be designed for.

When thinking about frontline workers consider:

- Role & Organisation
- Demographic
- Motivation
- Activities
- Obstacles
- Rewards & Joy
- Technology
- Connectivity
- Collaboration
- Change and Culture



Role & Organisation

- What's their role, job title?
- Where do they fit in the organisational structure?
- How are they organised?
- What % of the total workforce do they represent?

Motivation

- What's the key purpose of their role?
- Their goals?
- What pains are users trying to avoid?

Demographic

- Average and min/max age, gender

Technology

- What's their technology profile? Are they licensed?
- What devices they use

Connectivity

- Are they able to easily connect to the internet?

Collaboration

- Do they work in isolation or are they a highly-collaborative contributor?



Activities

- What activities and work this person engages in?

Obstacles

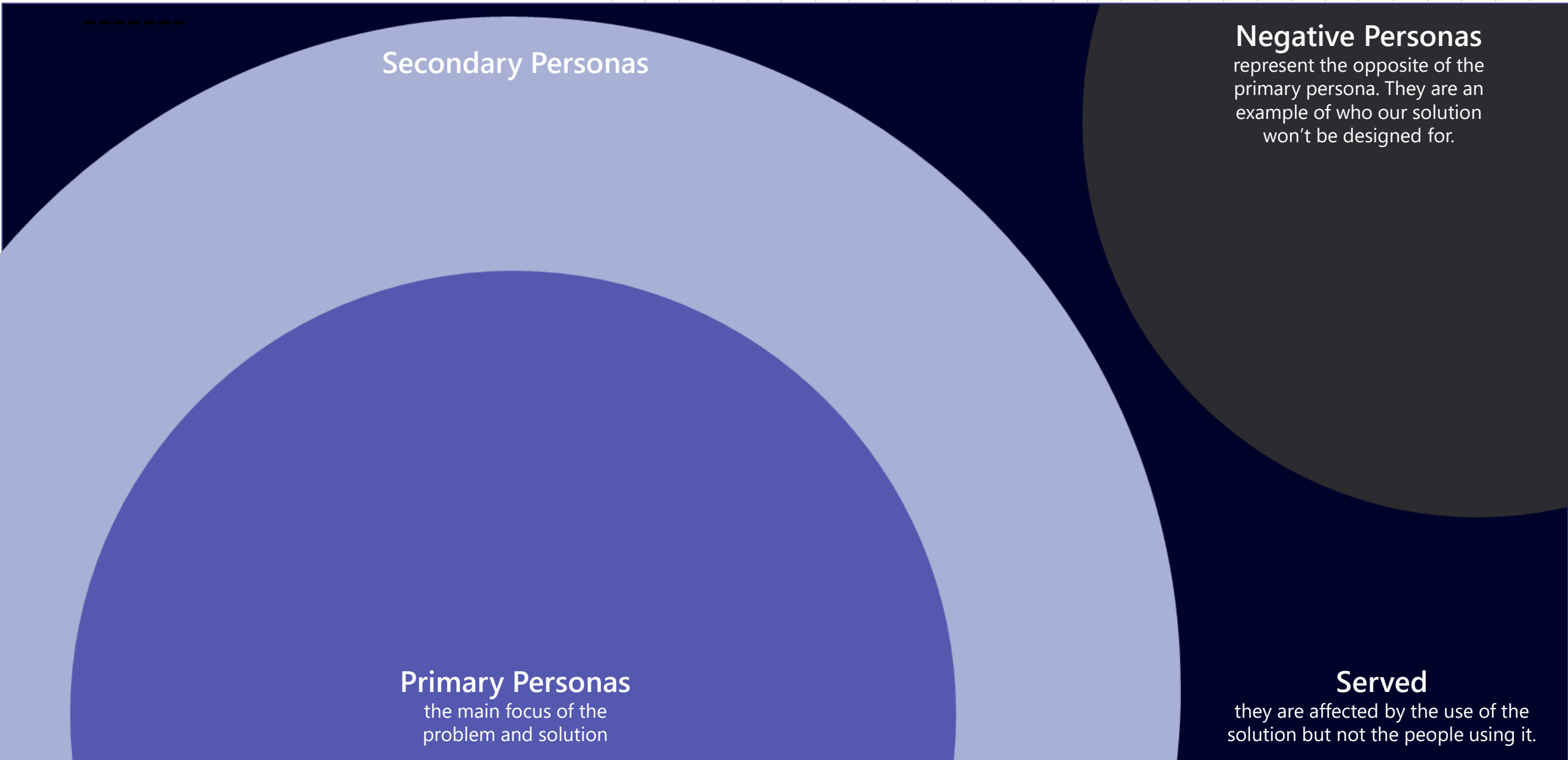
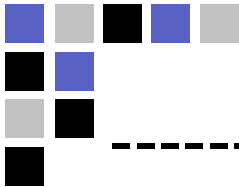
- What problems get in the way of users accomplishing their work? How does that make them feel?
- Alternatives and workarounds – what are the things they may use instead of the solution?

Rewards & Joy

- What makes users happy, delighted and pleasantly surprised?

Change and Culture

- Are they impacted by a lot of change?
- How have they been impacted by Covid-19?
- Are they willing to innovate?
- Are there any expectations on this role in the near future in terms of key organisational initiatives?

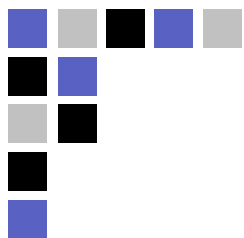


Secondary Personas

Primary Personas
the main focus of the
problem and solution

Negative Personas
represent the opposite of the
primary persona. They are an
example of who our solution
won't be designed for.

Served
they are affected by the use of the
solution but not the people using it.



Use p. 30 to reflect on apps across building blocks 1, 2, 3 and 4 that would help solve the problems you've identified in Discover

Envision

Choose the solution building blocks

Envision your solution with 1 + 2 + 3 ... + 4

FLW Solution Areas



Communication



Culture, wellbeing & engagement



Scheduling & cover management



Training & onboarding



Connected tech ecosystem



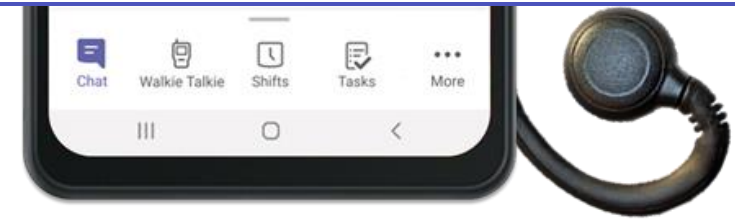
Productivity & process digitization

Solution building blocks

1 Teams frontline apps

Crafting the right experience in Teams for your frontline with:

- Teams apps made for frontline – Shifts, Tasks, Walkie Talkie, Praise.
- Role-based and compliant user experience with built-in security.



2 Microsoft apps 45 available



3 Third party apps 500+ available



4 Custom apps Unlimited possibilities!

Power Platform (low/no-code)



App templates
(low/no-code)
including Microsoft
Teams Shifts WFM
connectors

Built from scratch
and integrate with
existing WFM and
LoB investment



Envision your solution with 1 + 2 + 3 ... + 4

Reflections.. 



Communication



Culture, wellbeing & engagement



Scheduling & cover mgmnt



Training & onboarding



Productivity & process



Connected tech ecosystem







1 Teams 1st party

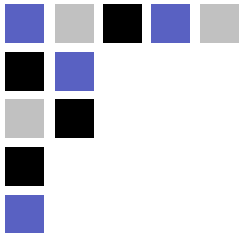
2 Microsoft 2nd party

3 3rd party

4 Custom

Envision your solution with 1 + 2 + 3 ... + 4

	 Communication	 Culture, wellbeing & engagement	 Scheduling & cover mgmnt	 Training & onboarding	 Productivity & process	 Connected tech ecosystem
1 Teams 1st party	Chats Channels Smart Camera Calls & Meetings Live Events Walkie Talkie (Android only) Targeting	Praise Share relevant announcements in Teams channels, or directly in a chat. Broadcast interactive town hall meetings with Teams live events.	Shifts The Time Clock app in Shifts	Teams & Channels dedicated for training and onboarding content	Tasks core for individual and team productivity Tasks publishing to enable organisational productivity Approvals	Appy Teams admin capabilities like app set up policies, app permissions to create the experience and highlight the apps that matter
2 Microsoft 2nd party	Communities Stream SharePoint Online for intranets and employee portals Sway for internal comms newsletters	Communities Stream SharePoint Online for Intranet based content Forms for surveys	Bookings	SharePoint Online – specifically Microsoft 365 learning pathways Stream Viva Learning	Bookings Viva Insights	-
3 3rd party	Sociabble	Kahoot	Kronos bot	Bites	Prodscore	-
4 Custom	Company Communicator app template Contact Group Lookup app template	App templates: Celebrations Co-worker Appreciation Custom Stickers Great Ideas Incentives Reflect	Flow connectors for the Shifts app Custom connector and integration with WFM systems Staff Check-ins app template	App templates: Employee Training Grow Your Skills New Employee Onboarding	App templates: Ask Away , Associate Insights , Checklist , Expert Finder , Incident Reporter , Rapid Assist , Remote Support	All the amazing platform and extensibility options



Use the checklist in this section to help you execute an effective pilot

Build

Build solution prototype and validate through pilot



Checklist | Effective Pilot for Frontline Workers

Gather your people

- Identify Frontline pilot users and their managers

Plan pilot logistics

- Key scenarios across 2 – 6 solution areas that best fit pilot group confirmed
- Agreed plan for monitoring usage of Teams by Frontline
- Success criteria and feedback mechanism established

Configure Teams

- Teams capabilities for pilot enabled
- Pre-pinned apps in Teams configured
- Messaging policies configured for defined pilot scenario(s)
- Teams for Frontline configured with relevant connectors, channels and tabs
- Pilot users have log-in credentials and can manage their credentials
- Pilot users are licensed
- Pilot users can get to Teams app
- Agreed method of joining teams and chats in Teams for pilot users is enabled
- Confirmed environment for pilot – production or test tenant
- Applicable guest and external access settings configured
- Pilot users are assigned relevant member permissions
- Permission policies configured to allow apps needed for pilot
- Channel moderation is set up

Communicate and train

- Pilot user readiness plan established including awareness, training and support on targeted scenarios
- Managers of Frontline pilot users can articulate the benefits of new ways of working using Teams and the expectations for the pilots

Measure feedback

- Measure usage and assess user satisfaction, feedback and insights

Iterate & Expand

- Adjust plan based on feedback and success criteria
- Expand Teams to more capabilities or locations



Explore more resources

For IT Pros / Business Decision Makers



Overview: <https://aka.ms/TeamsForFrontlineOverview>



Quick start guide: [Quick start - Microsoft Teams Frontline Worker - Microsoft Teams | Microsoft Docs](#)



Get started with Shifts: <https://aka.ms/ShiftsForTeams>



Teams for Retail: <https://aka.ms/TeamsForRetail>



Provision at scale for Frontline: <https://aka.ms/OnboardFrontlineToTeams>



Teams Chalk Talks <https://aka.ms/TeamsChalkTalks>

For End Users



Live, online training: <https://aka.ms/TeamsLiveTraining>



On-demand training: <https://aka.ms/TeamsOnDemand>



Quick how-to videos: <https://aka.ms/TeamsTraining>