

How to enable Firstline Workers for Microsoft Teams

Workbook

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About this Workbook

Organizations embracing digital transformation recognize the criticality of empowering their entire workforce with best-in-class tools that enable them to deliver superior customer experience and optimize operational productivity. Microsoft Teams provides a single experience for productive conversations, smooth flow of information, simplified schedule management in a compliant and secure environment. Implementing a pilot for key scenarios is a crucial first step to validate technical and user readiness, identify and mitigate issues, and help ensure a successful organization-wide implementation.

This workbook is designed around a proven, success framework to help you prioritize your starting scenario and develop a plan for a pilot for the tailored experience to suit the needs for your firstline co-workers.

Designed as a companion guide to our [“How to enable your firstline workers with Teams” Workshop](#), this workbook can be used to capture key decision points, document tasks, complete activities and capture your pilot planning notes.

Pilot getting started checklist

Why	Who	Where	When	What	How
<ul style="list-style-type: none">● Articulate your "why" for digitally enabling your firstline workforce● Articulate your "why" for running a pilot	<ul style="list-style-type: none">● Identify roles you would like to be part of the firstline pilot● Identify the managers of the firstline pilot users● Assemble your core team to execute the pilot	<ul style="list-style-type: none">● Identify the location for your pilot	<ul style="list-style-type: none">● Identify the date for your pilot kick off and the duration of the pilot	<ul style="list-style-type: none">● Identify the scenarios that you would like to pilot● Map the scenarios to Teams use cases	<p>Technical enablement</p> <ul style="list-style-type: none">● Access● Authentication● Licensing● Teams app configuration <p>People enablement</p> <ul style="list-style-type: none">● Adoption

T1

T2

T3

T4

Identify firstline pilot users and their managers

Identify scenarios to pilot:

- Communication
- Employee Experience
- Employee Engagement
- Information
- Productivity

Get the apps and connectors that light up your scenarios:

- Microsoft apps
- 3rd party apps from Teams app catalogue
- Production-ready apps / App templates:
 - Get copy of the app(s) from GitHub
 - Configure the apps
 - Deploy and publish

•Custom apps:

- Design the app
- Build and test the app
- Deploy and publish

•Configure Microsoft Teams Shifts WFM connector

Structure and configure Teams and Channels:

- Configure Tabs
- Configure connectors
- Membership, roles, tags and settings
- Channel moderation

Ensure compliance and security:

- Pilot user provisioning
- Pilot user and credential management
- Pilot user access and authentication
- Secure data and devices
- Maintain compliance

Configure messaging experience with messaging policies

Create a custom app permission policy to control what apps are available for firstline pilot user groups

Establish success criteria and how you will measure it:

- Teams usage monitoring
- Feedback mechanism

Pre-pin apps to mobile navigation with app set up policies

- Decide whether users will be allowed to personalise their app bar by pinning apps to it.

User readiness and adoption:

- Awareness, desire, knowledge and ability

Objective	Understand the roles of key stakeholders for a successful deployment and roll-out of Teams for Firstline workers.
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Overview	To successfully enable Teams for your firstline, you'll need to ensure you have engaged with not only the end-users – firstline workers and managers – but also key decision makers.
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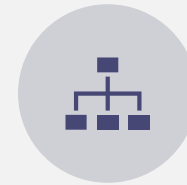
Decision points	<ul style="list-style-type: none">○ Decide the activities/roles relevant to the Firstline Worker implementation project.
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Business Decision Maker	IT Decision Maker	IT Pro	Firstline Manager	Firstline Worker	Adoption and Change Manager	Project Manager

- What roles you would describe as firstline in your organisation?
- How are your firstline workers structured in your organisational hierarchy?



Numbers









Structure



Technology and
Connectivity profile

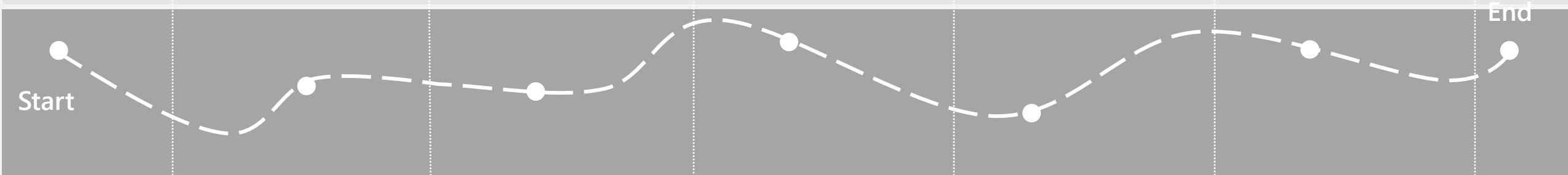
Role:

 Communication	 Employee experience	 Employee engagement	 Information	 Productivity	 Compliance & Security	About devices and connectivity
Tools and apps:	Tools and apps:	Tools and apps:	Tools and apps:	Tools and apps:	Tools and apps:	

Scenario: Scenario outcome(s):

Who is involved?

Information Input











Information Output

How would you rate this step?

Apps, Tools & Forms

Scenario: Scenario outcome(s):

 Who is involved?					
Start 					End 
How would you rate this step?					
Apps, Tools & Forms					

Teams Set-up capabilities

- What Teams capabilities will you need to enable for a successful pilot? Have these been enabled for your pilot users? (e.g. Shifts)
- What apps will your pilot users see pinned in their Teams client – 1st, 2nd and 3rd party apps?
- Will pilot users, on mobile devices, have favorite channels displayed above recent chats?
- What will the pilot users' Team look like – channels, tabs, connectors?

Team name	
Purpose	
Owners	
Members	
Membership <i>(dynamic?)</i>	
Tags	

Conversations

Allow editing of sent messages

On ☐ Off ☐

Allow deleting of sent messages

On ☐ Off ☐

Channels

Team members can add channels or edit existing ones

On ☐ Off ☐

Team members can add, edit or remove tabs

On ☐ Off ☐

Team members can add, edit or remove connectors

On ☐ Off ☐

Team members can add, edit or remove apps

On ☐ Off ☐

Channel	Description	Privacy	Settings	Tabs and Connectors

People and Basics

- How will your pilot users log in to Teams?
- How will your pilot users change their log-in?
- How will your pilot users be added to the relevant Teams? (self-joined, invited by Team owner or added by IT)
- Will you need people to be added dynamically?
- How will your pilot users get to the Teams app – will they need to install it themselves or will the app be pushed on their device?
- Do your pilot users have the licenses they need in order to use all the Teams features you want to roll out?

Permissions and Policies

- Will you need to turn on external access for your organization? If enabled, will your limit which domains your organization can communicate with?
- Will you conduct your pilot on production or demo tenant?
- Will you permit guests? If enabled, will you customize the features available to guests in your organization?
- Who will be part of your Teams – who are the owners and members? What will they be allowed to do?
- What apps will your pilot users be permitted to access on Teams? (App Permissions)

Assigning policies

Do this	If...	Using...
Assign a policy to individual users	You're new to Teams and just getting started or you only need to assign one or a couple of policies to a small number of users.	The Microsoft Teams admin center or PowerShell cmdlets in the Skype for Business Online PowerShell module
Assign a policy package	You need to assign multiple policies to specific sets of users in your organization who have the same or similar roles. For example, assign the Education (Teacher) policy package to teachers in your school to give them full access to chats, calling, and meetings and the Education (Secondary school student) policy package to secondary students to limit certain capabilities like private calling.	The Microsoft Teams admin center or PowerShell cmdlets in the Teams PowerShell module
Assign a policy to a batch of users	You need to assign policies to large sets of users. For example, you want to assign a policy to hundreds or thousands of users in your organization at a time.	PowerShell cmdlets in the Teams PowerShell module
Assign a policy to a group (in preview)	You need to assign policies based on a user's group membership. For example, you want to assign a policy to all users in a security group or organizational unit.	PowerShell cmdlets in the Teams PowerShell module
Assign a policy package to a batch of users	You need to assign multiple policies to a batch of users in your organization who have the same or similar roles. For example, assign the Education (Teacher) policy package to all teachers in your school using batch assignment to give them full access to chats, calling, and meetings and assign the Education (Secondary school student) policy package to a batch of secondary students to limit certain capabilities like private calling.	PowerShell cmdlets in the Teams PowerShell module
Assign a policy package to a group (coming soon)		

Adoption and communication

- How will pilot firstline workers be aware of the pilot and what's expected of them?
- Are firstline managers able to articulate to their team what's in it for them to pilot new ways of working on Teams?
- How will pilot firstline workforce learn how to use Teams to fulfil the scenario being piloted?

Resources

Getting Started

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

What's new! <https://aka.ms/TeamsForFirstlineUpdates>

Quick start guide: <https://aka.ms/TeamsFirstlineQuickStart>

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

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

Provision at scale for Firstline: <https://aka.ms/OnboardFirstlineToTeams>

Resources

Title	Link
Manage apps	https://docs.microsoft.com/en-gb/mem/intune/apps/
Microsoft Intune protected apps	https://docs.microsoft.com/en-gb/mem/intune/apps/apps-supported-intune-apps
Create people manager teams in Microsoft Teams	https://docs.microsoft.com/en-us/microsoftteams/create-manager-directs-teams
Manage teams policies in Microsoft Teams	https://docs.microsoft.com/en-us/microsoftteams/teams-policies
Assign team owners and members in Microsoft Teams	https://docs.microsoft.com/en-us/microsoftteams/assign-roles-permissions
Manage messaging policies in Teams	https://docs.microsoft.com/en-us/microsoftteams/messaging-policies-in-teams
Set up and manage channel moderation in Microsoft Teams.	https://docs.microsoft.com/en-us/microsoftteams/manage-channel-moderation-in-teams
Manage who can create Office 365 Groups.	https://support.office.com/article/manage-who-can-create-office-365-groups-4c46c8cb-17d0-44b5-9776-005fced8e618
Team expiration and renewal in Microsoft Teams	https://docs.microsoft.com/en-us/microsoftteams/team-expiration-renewal
Create a Teams 'Intranet Portal app' from a SharePoint Online site or page	https://docs.microsoft.com/en-us/microsoftteams/teams-standalone-static-tabs-using-spo-sites
Create an org-wide team in Microsoft Teams	https://docs.microsoft.com/en-us/microsoftteams/create-an-org-wide-team
Enterprise user management documentation - Azure AD	https://docs.microsoft.com/en-us/azure/active-directory/users-groups-roles/
Assign policies to your users in Microsoft Teams	https://docs.microsoft.com/en-US/microsoftteams/assign-policies
Manage custom app policies and settings in Microsoft Teams	https://docs.microsoft.com/en-us/microsoftteams/teams-custom-app-policies-and-settings#overview-of-custom-apps
Manage tags in Microsoft Teams	https://docs.microsoft.com/en-us/microsoftteams/manage-tags
Overview of dynamic membership for teams	https://docs.microsoft.com/en-us/microsoftteams/dynamic-memberships
Edit Microsoft Teams user settings in bulk	https://docs.microsoft.com/en-US/microsoftteams/edit-user-settings-in-bulk

Resources

Title	Link
View cross-team and per-team analytics in Teams	https://docs.microsoft.com/en-us/microsoftteams/teams-analytics-and-reports/cross-team-per-team-analytics
Manage your LOB Apps	https://docs.microsoft.com/en-us/microsoftteams/manage-your-lob-apps
Microsoft Teams Developer Platform	https://docs.microsoft.com/en-us/microsoftteams/platform/concepts/extensibility-points
How to provision Teams at scale for Firstline Workers	https://docs.microsoft.com/en-gb/MicrosoftTeams/flw-scripted-deployment#create-and-set-up-teams
Get clients for Microsoft Teams	https://docs.microsoft.com/en-gb/microsoftteams/get-clients
Security and compliance in Microsoft Teams	https://docs.microsoft.com/en-gb/microsoftteams/security-compliance-overview
Manage your users with My Staff (preview)	https://docs.microsoft.com/en-us/azure/active-directory/users-groups-roles/my-staff-configure
Delegate user management with My Staff (preview)	https://docs.microsoft.com/en-us/azure/active-directory/user-help/my-staff-team-manager
New Microsoft 365 SKU for Firstline Workers	https://www.microsoft.com/en-us/licensing/news/m365-firstline-workers
Configure and enable users for SMS-based authentication using Azure Active Directory (preview)	https://docs.microsoft.com/en-us/azure/active-directory/authentication/howto-authentication-sms-signin
Tutorial: Configure SAP SuccessFactors to Active Directory user provisioning.	https://docs.microsoft.com/azure/active-directory/saas-apps/sap-successfactors-inbound-provisioning-tutorial
Tutorial: Configure Workday for automatic user provisioning.	https://docs.microsoft.com/azure/active-directory/saas-apps/workday-inbound-tutorial