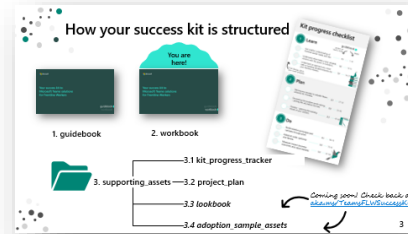**Microsoft**

Your success kit to Microsoft Teams solutions for Frontline Workers

guidebook

workbook

What's inside

How your success kit is structured

How to use this workbook

Sections covering all you need to know to succeed on your journey to valuable Teams solutions for frontline workers

How your success kit is structured

You are
here!

Your success kit to
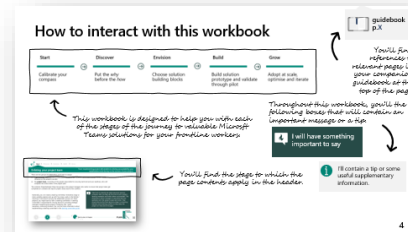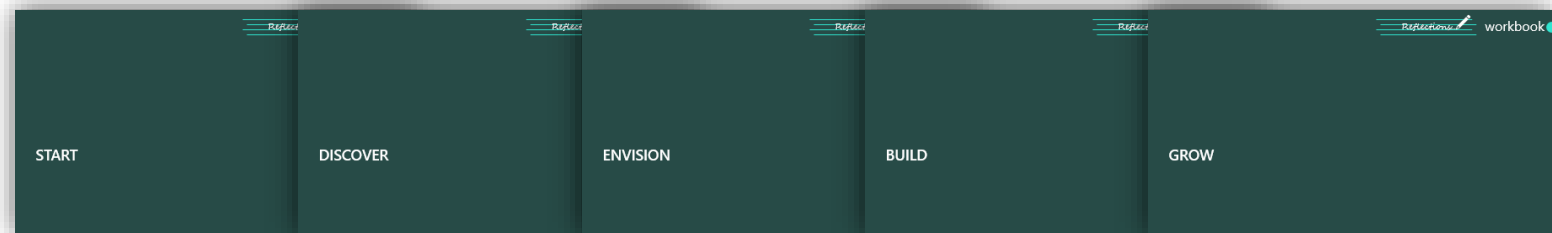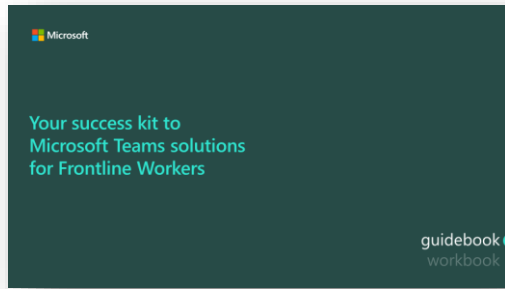Microsoft Teams solutions
for Frontline Workers

guidebook
workbook

Your success kit to
Microsoft Teams solutions
for Frontline Workers

guidebook
workbook

1. guidebook

2. workbook

Kit progress checklist

1 Learn

Get a better understanding of frontline worker needs and role.

guidebook
section to
learn more → pages

Understand what makes a truly valuable solution with the power to transform.

Tick things off as you make progress

Understand an approach you could take to building valuable solutions for your frontline workers.

1.1 — 1-14

1.2 — 14-15

1.3 — 16-27

2 Plan

Starting your journey to valuable Teams solutions for Frontline.

Discovering the problem worth solving – putting the why before the how.

Envision – planning the building blocks of your solution.

2.1 — 27-35

2.2 — 35-46

2.3 — 47-60

3 Do

Build solution prototype and validate through pilot.

Adopt at scale, optimise and iterate.

Measure impact, business outcomes and value realised.

3.1 — 60-75

3.2 — 76-81

3.3 — 81-100

3. supporting_assets

3.1 kit_progress_tracker

3.2 project_plan
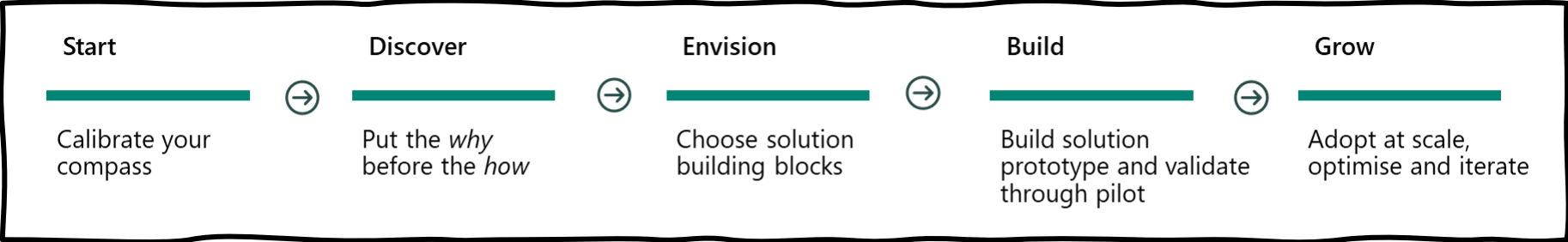
3.3 *lookbook*

3.4 *adoption_sample_assets*
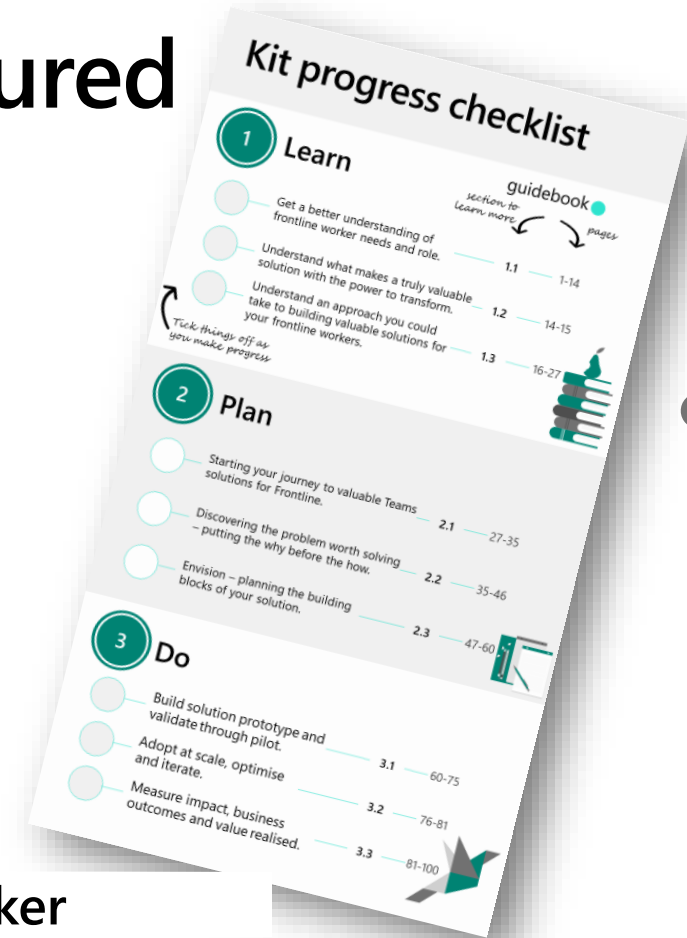
Coming soon! Check back at
aka.ms/TeamsFLWSuccessKit
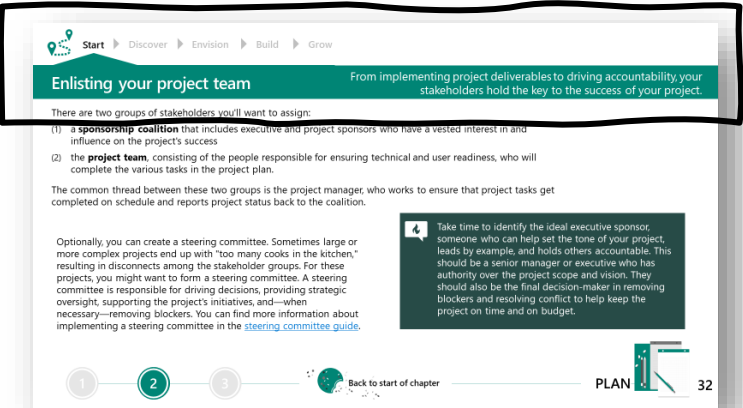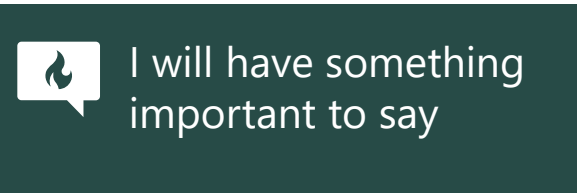
How to interact with this workbook

guidebook p.X

You'll find references to relevant pages in your companion guidebook at the top of the page.

Start	Discover	Envision	Build	Grow
Calibrate your compass	Put the *why* before the *how*	Choose solution building blocks	Build solution prototype and validate through pilot	Adopt at scale, optimise and iterate

This workbook is designed to help you with each of the stages of the journey to valuable Microsft Teams solutions for your frontline workers.

Throughout this workbook, you'll the following boxes that will contain an important message or a tip.

I will have something important to say

Enlisting your project team — From implementing project deliverables to driving accountability, your stakeholders hold the key to the success of your project.

There are two groups of stakeholders you'll want to assign:

(1) a **sponsorship coalition** that includes executive and project sponsors who have a vested interest in and influence on the project's success

(2) the **project team**, consisting of the people responsible for ensuring technical and user readiness, who will complete the various tasks in the project plan.

The common thread between these two groups is the project manager, who works to ensure that project tasks get completed on schedule and reports project status back to the coalition.

Optionally, you can create a steering committee. Sometimes large or more complex projects end up with "too many cooks in the kitchen," resulting in disconnects among the stakeholder groups. For these projects, you might want to form a steering committee. A steering committee is responsible for driving decisions, providing strategic oversight, supporting the project's initiatives, and—when necessary—removing blockers. You can find more information about implementing a steering committee in the steering committee guide.

Take time to identify the ideal executive sponsor, someone who can help set the tone of your project, leads by example, and holds others accountable. This should be a senior manager or executive who has authority over the project scope and vision. They should also be the final decision-maker in removing blockers and resolving conflict to help keep the project on time and on budget.

Back to start of chapter — PLAN — 32

You'll find the stage to which the page contents apply in the header.

I'll contain a tip or some useful supplementary information.

4

START

Gathering your team

Who ...	... will ...
	drive overall messaging and accountability
	represent the frontline business – either a manager, regional or divisional lead. They are a trusted, visible leader for frontline workers you are building a solution for.
	is accountable for talent management to help with Training & Onboarding scenarios
	is accountable for engagement of frontline
	is accountable for schedule management of frontline
	is accountable operational efficiency of frontline
	is accountable for internal communication for frontline
	oversees the project, ensuring completion of all tasks
	create and implements the solution architecture
	provide insights into security design, process, and implementation
	owns presence tooling such as chat, meetings, and calling
	owns asynchronous tooling such as SharePoint, OneDrive, and so on
	manages the readiness of your support desk
	oversees the user change management and adoption program
	designs and implements communications campaigns
	designs and implements training plans

In **supporting_assets** folder you'll find an Excel file called **Project Plan**. There you'll find a detailed list of actions and a tab called **people** where you can populate the names of your key project stakeholders and assign actions to them.

Reflections..✎

Your big why – how far does your mission go?

Frontline role	What proportion of your total workforce does this roles represent?	How are they organized? What does the reporting structure look like?	Who do they mostly collaborate and interact with?	Key outcomes and results they drive and achieve?

List out the key frontline roles you are planning on enabling with Microsoft Teams.

Then for each role, use the next pages to prioritize the areas that matter to them and where you'd like to focus.

Transforming

Digital Ecosystem

| Schedule Management | Wellbeing & engagement | Training & onboarding | Digitized processes |

Empowering

Communication — Connect frontline for collaborative experiences

| Modern devices | Safeguard your business |

Enabling

Reflections..

7
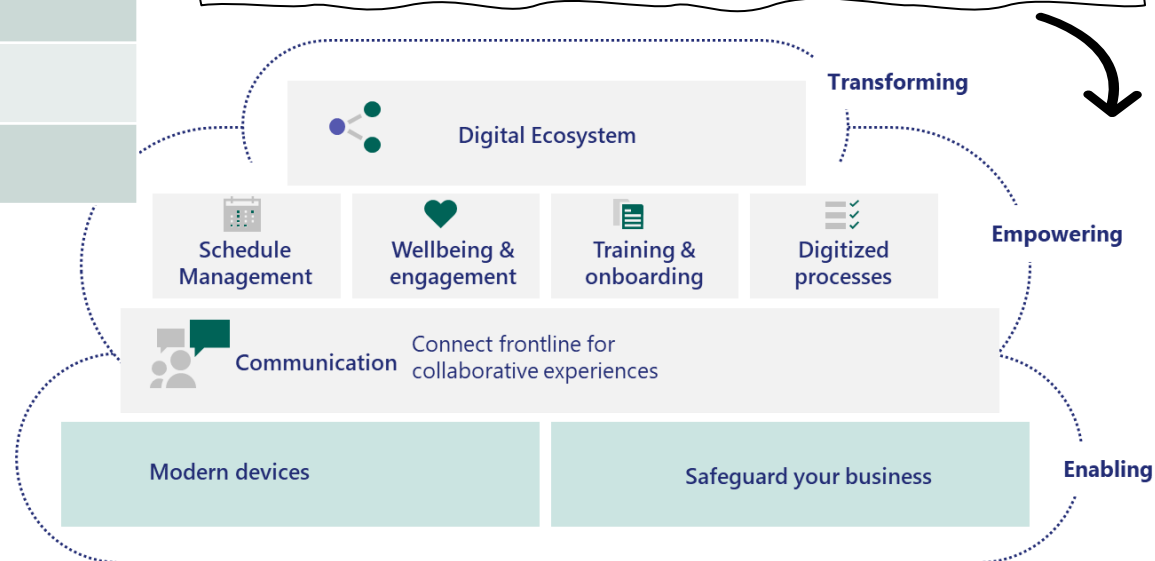
Getting familiar with your frontline workforce

Numbers
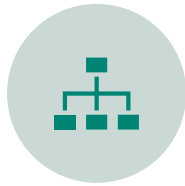
Structure

Technology and
Connectivity profile

- What roles you would describe as frontline in your organisation? Are they all in scope for this project?

- How are your frontline workers structured in your organizational hierarchy? What's the proportion of the total workforce do your frontline roles represent?

- Do they work in shifts patterns? How are they paid – hourly or salaried?

Reflections...

Inventory of facts

For each of the following, create a list of what you know for sure, what's an assumption and what is an unknown.

enable

- Enabling your frontline with modern devices whilst safeguarding your business
- Connecting your frontline workers to communicate

empower

- Wellbeing & engagement to nurture employee wellbeing to improve frontline workforce experience and cultivate productivity
- Schedule management for simplified mobile access to schedule management tools
- Training & onboarding to promote continual growth in your frontline workers and encourage knowledge exchange
- Digitized processes to operational efficiency by digitizing paper-based process and automating routine and repetitive

transform

- Building out a true digital ecosystem drive frontline agility and improve execution quality by uniting the technology your frontline workforce depends on behind a single pane of glass.

Reflections...

Understanding at a high-level experience areas to focus on

Frontline role:

In each of the boxes below, score the goal on a scale of 1 –10 in terms of how important and how desirable that goals is for the frontline worker.

enable

... the foundations

☐ Enabling your frontline with modern **devices** whilst **safeguarding** your business

☐ **Connecting** your frontline workers to **communicate**

empower

... frontline workers to get the job done with frontline apps

☐ **Wellbeing & engagement** to nurture employee wellbeing to improve frontline workforce experience and cultivate productivity

☐ **Schedule management** for simplified mobile access to schedule management tools

☐ **Training & onboarding** to promote continual growth in your frontline workers and encourage knowledge exchange

☐ **Digitized processes** to operational efficiency by digitizing paper-based process and automating routine and repetitive steps

transform

... frontline workforce with a truly digital ecosystem

☐ Building out a true **digital ecosystem** drive frontline agility and improve execution quality by uniting the technology your frontline workforce depends on behind a single pane of glass.

Reflections...

Goals and OKRs

Objective	Key result

Write down your OKRs. Use your prioritized frontline employee experience areas per role to help you construct OKRs.

Reflections...

Project KSIs

KSI	Specific target a specific area for improvement	Measurable quantify, or at least suggest an indicator of, progress	Assignable specify who will do it	Realistic state what results can realistically be achieved, given available resources	Time-related specify when the results can be achieved

Reflections... ✏

Use the table to capture your key success indicators. Get inspired by the KSIs for each stage of the journey that you can find the Guidebook's Chapter 1.3

DISCOVER

What needs solving in my organization?
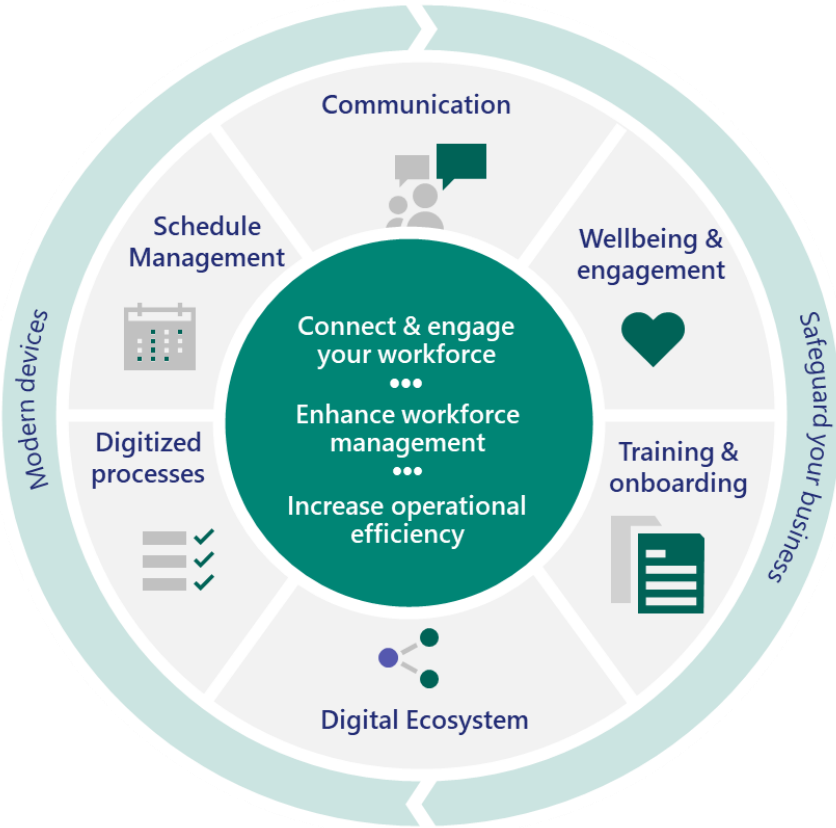
For each key experience area, determine:

- 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 workers, related stakeholders and business overall if a solution in this area is introduced?

- How will you measure success?

Reflections..

Enable | Modern device + Safeguard your business
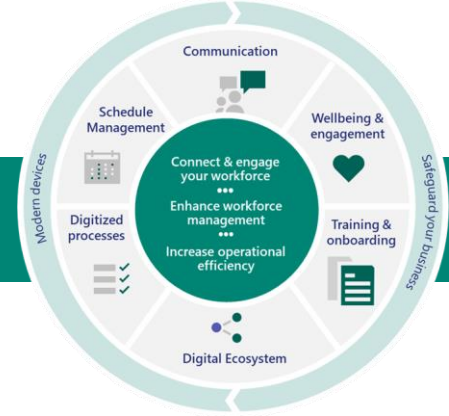
Describe the technology landscape of your frontline workforce?

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?

What devices are the Frontline Worker using? Who owns the device? What kind of device is it?

Is it a personal device (bring your own device)? Is it an assigned device from the organization? Is it an assigned device but also shared between multiple people in the organization?

What work is being done on the device? Is it critical to map the individual to that specific task? What's the frequency of work on the device?

How data sensitive is the work that's being performed? How time sensitive is the work being done on the device?

Reflections...

Enable | Communication

Connect to communicate

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?

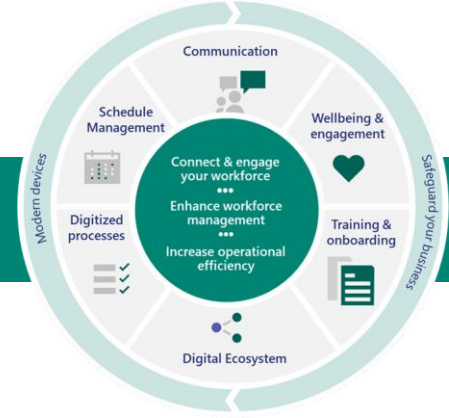How satisfied are your frontline workers with the communication tools they have?
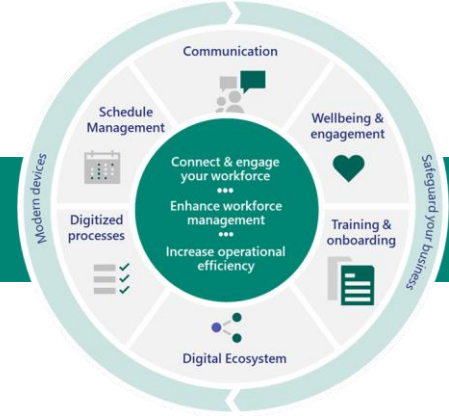
Reflections...

Empower | Wellbeing & engagement

♥ 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...

Empower| Schedule management
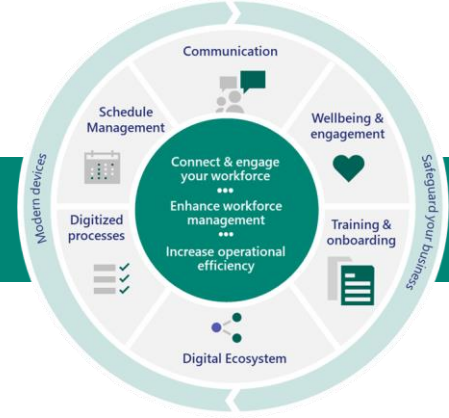
Schedule management

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 work management process?

Reflections...

Empower | Training & onboarding

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?

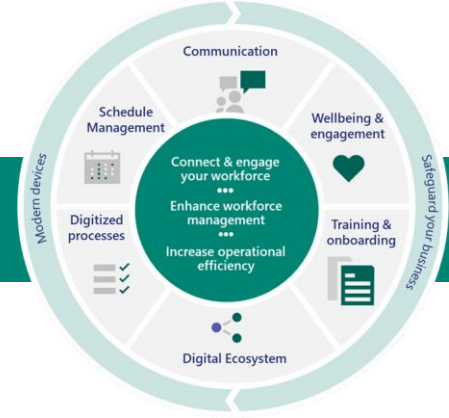How is knowledge currently transferred on the frontline?

Reflections...

Empower | Digitized processes

Digitized processes

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..

Defining frontline personas

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 all the frontline roles you are targeting and other roles in your organization that are impacted by the solutions you are building .=

Step 2. For each target frontline role, consider the following questions

Role & Organisation

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

Motivation

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

Demographic

- Average and min/max age, gender

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?

Technology
- What's their technology profile?
- What devices do 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?

Reflections..

Writing stories

Purpose

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

Instructions

Step 1. Brainstorm as many stories you about each persona which describes their work in a world where the problem doesn't exist or where a solution in in place which prevents the problem.

Step 2. Refine into smaller stories, and make sure your story tells us about:
*   the *persona* - the hero of the narrative who will most likely be your target frontline role
*   the *need* - what can our hero persona do that they couldn't do before?
*   The benefit the persona experiences and the expected value

You can use the persona goals you've identified in the persona definition activity.

Use the following focusing statement to help you identify user stories:

> How might we help **[persona]** to **[goal, perform some activity]** when **[what makes it hard? the obstacle]**

Ask yourself:

> How could we address the persona's obstacles and create the desired benefits for them?

Reflections... ✏

Purpose

Let's look at the what, who, why, how, when, and where of the problem.

This will help us get consensus on the problem worth solving, why it's worth solving.

Instructions

1. **Start with getting clear on the 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?**
2. **Consider running the 5 whys to ensure you have full clarity of the problem.**
3. **Continue reflecting on the questions until you reach a consensus on the problem(s) that needs solving:**

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...

23

Key outcomes and how you'll get there

✓	Outcome	Notes
	Documented scenarios and problem statements, personas, and user stories – clarity on what would be of true value to the frontline workers	
	Confirmed "What's in it for me?" for every persona the solution you intend to build will serve	
	Secured executive sponsorship	

Use this checklist to track your progress in this stage of the journey.

ℹ In your **supporting_assets** folder you will find a project plan that you can use to track your progress in more details as well as keep a detailed list of actions and accountabilities.

Reflections... ✎

ENVISION

Teams and Channel Structure

	Area	Questions to help with Teams and Channels structure
enable	Communication	• What's the current set-up – frequencies in use? • Who connects and radios to each other? • Structured physical location Team naming convention helps assist Corporate Communications with Cross Posting to multiple teams simultaneously with ease. For example, you can search and cross-post to all Teams with UK in the name to target all UK locations
empower	Schedule Management	• Who needs to swap with whom? • Who manages the schedule and for how many people?
	Wellbeing & engagement	• How is recognition provided? • Whose role is it to ensure engagement of the frontline worker?
	Training & onboarding	• How is training content shared? • Who is sharing the content and with whom? • Do you want to support peer-to-peer best practice?
	Digitized processes	• Who needs to work and see activities shared across a group of people? • How functions like marketing, safety, compliance and operations disseminate tasks today?

Use the next page to think about the channels and teams for each frontline role you are enabling and empowering
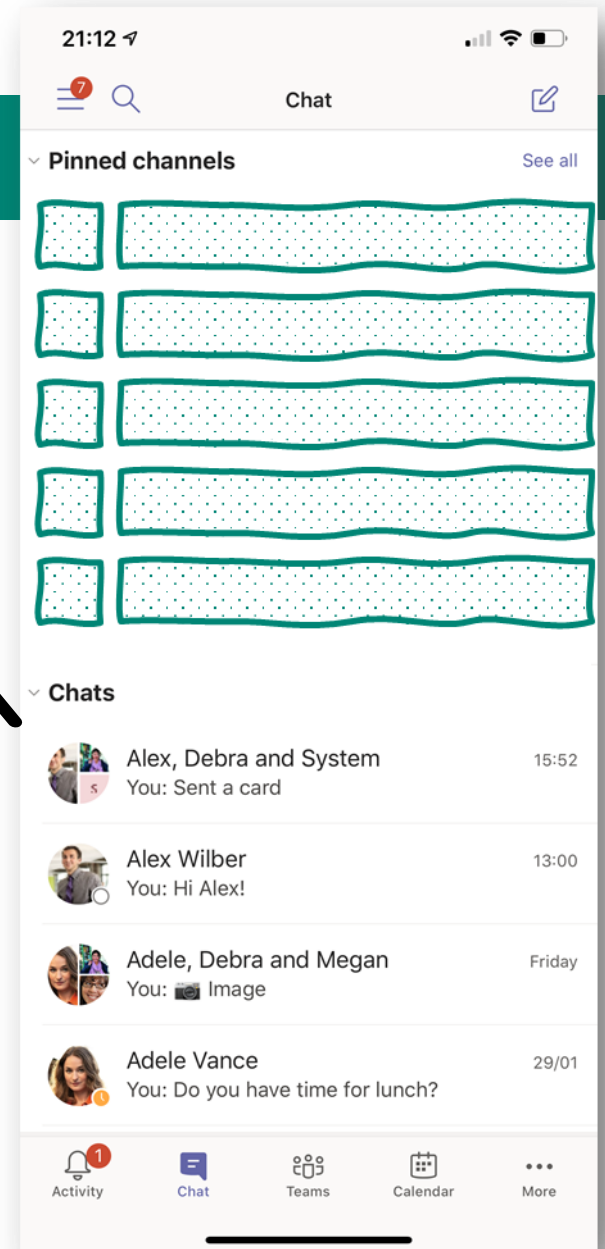
Reflections...

Teams and Channel Structure

	Channel name	Purpose of Channel	Team Name	Who is in the team	What tags will help with targeting content?
1					
2					
3					
4					
5					

If you only had up to 5 places that you'd like to have your frontline workers go to and participate in, what would they be?

Reflections...

Teams and Channel Structure

Team name	
Purpose	
Owners	
Members	
Membership *(dynamic?)*	
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

Reflections... 🖉

Use this template to plan for Teams and Channels for your frontline workers

Deciding on messaging policies

❑ **Chat** to allow your frontline to use the Teams app to chat with other people.

❑ **Owners can delete sent messages** Use this setting to let owners delete messages that users sent in chat.

❑ **Users can delete sent messages** Use this setting to let users delete messages that they sent in chat.

❑ **Users can edit sent messages** Use this setting to let users edit the messages that they sent in chat.

❑ **Read receipts** Read receipts allow the sender of a chat message to be notified when their message was read by the recipient in 1:1 and group chats 20 people or less. Message read receipts remove uncertainly about whether a message was read, and improve team communication. Please note that read receipts are not captured in eDiscovery reporting.

❑ Use of:
  ❑ **Giphys in conversations** and **Giphy content rating**
  ❑ **Memes in conversations** If you turn this on, users can include Memes in chat conversations with other people.
  ❑ **Stickers in conversations** If you turn this on, users can include Stickers in chat conversations with other people.

❑ **Allow users to translate messages** Turn this setting on to let users automatically translate Teams messages into the language specified by their personal language settings for Microsoft 365 or Office 365.

❑ **Allow immersive reader for viewing messages** Turn this setting on to let users view messages in Microsoft Immersive Reader. Immersive Reader is a learning tool that provides a full screen reading experience to increase readability of text.

❑ **Send urgent messages using priority notifications** If you turn this on, users can send messages using priority notifications. Priority notifications notify users every 2 minutes for a period of 20 minutes or until messages that are marked as *urgent* are picked up and read by the recipient, maximizing the likelihood that the message is acted upon in a timely manner.

❑ **Audio message creation** Note: audio messages are not captured in eDiscovery reporting.

❑ **On mobile devices, display favorite channels above recent chats** Enable this setting to move favorite channels to the top of the mobile device screen so that a user doesn't need to scroll to find them.

❑ **Allow a user to remove users from a group chat** Turn this setting on to let a user remove other users from a group chat. This feature lets you continue a chat with a smaller group of people without losing the chat history.

❑ **Enable suggested replies** Turn this setting on to enable suggested replies for chat messages.

Reflections... ✏️

29

Key outcomes and how you'll get there

✓	Outcome	Notes
	Prioritized and validated solution approach with documented plan for Technical enablement	
	Prioritized and validated solution approach with documented plan for Adoption	
	Prioritized and validated solution approach with documented plan for Pilot execution	
	Identify relevant roles and responsibilities for execution	

Use this checklist to track your progress in this stage of the journey.

ℹ In your **supporting_assets** folder you will find a project plan that you can use to track your progress in more details as well as keep a detailed list of actions and accountabilities.

Reflections...

BUILD

Pilot checklist

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 mange 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

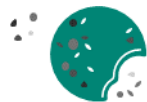○ Expand Teams to more capabilities or locations

Reflections..

Establishing KPI benchmarks

Use the framework below to define your own success criteria. Remember to make them specific, measurable, attainable, relevant and timely.

| Success Criteria	Method	Goal
Reduced consumer chat application usage for work on personal devices	Quantitative • Survey pre- and post to poll number of employees using consumer chat application	Comparison of pre and post should show reduction in at least 90%. Users should also indicate that they would like to continue using Teams over consumer chat application.

Configuring Teams

|	
Prerequisites and environmental dependencies for Teams	
Messaging policies	
Channel moderation and Teams Policies	
App set up policies	
Teams structure – channels, content and chat	
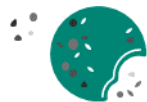
People & Basics

|	
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 they want to roll out?	
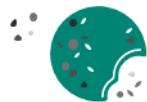
Will you need to turn on external access for your organization? If enabled, will your limit which domains your organization can communicate with?	
Will you conduct your pilot in your production tenant?	
Will you permit guests? If enabled, will you customize the features available to guests in your organization?	
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)	
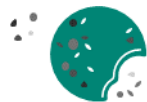
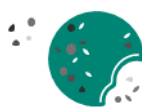① ② ③ Back to start of chapter DO

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

1   2   3   Back to start of chapter   DO

Key outcomes and how you'll get there

✓	Outcome	Notes
	Technical enablement completed for: Identity, access, and authentication	
	Technical enablement completed for: Device management	
	Technical enablement completed for: Teams configuration	
	Apps published and deployed	
	Adoption and communication plan validated & optimized	
	Content strategy activated	
	Desired experience and value validated	

Use this checklist to track your progress in this stage of the journey.

ℹ In your **supporting_assets** folder you will find a project plan that you can use to track your progress in more details as well as keep a detailed list of actions and accountabilities.

Reflections... ✏

GROW

Key outcomes and how you'll get there

✓	Outcome	Notes
	All targeted frontline workers and relevant stakeholders are enabled and using the solution	
	Adoption & communication plan executed	

Use this checklist to track your progress in this stage of the journey.

ⓘ In your **supporting_assets** folder you will find a project plan that you can use to track your progress in more details as well as keep a detailed list of actions and accountabilities.

Reflections...

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