



Your success kit to Microsoft Teams solutions for Frontline Workers

guidebook ●
workbook



Welcome!

Who is this for

This guidebook and the rest of the kit contents are a comprehensive set of assets to help any frontline digital enablement project end-to-end. As such there is content here that will be helpful to project managers, change managers and leadership roles across frontline, wider business and technical domains ... hence the many pages 😊 But don't worry, you can navigate to content that's most relevant to your role by checking out our content maps per role that follow. You'll find content maps for:

- Project manager
- Change manager
- Business leader
- Technical owner

Good to know

This is a live document and will be regularly updated. To get the latest release of the Success Kit, head over to aka.ms/TeamsFLWSuccessKit

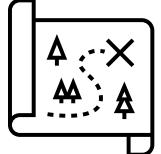
We'd love to hear from you – when you've had a chance to review the content and leverage the success kit, please let us know your feedback. It'll take less than 5 minutes and will ensure that the next iteration of this kit is more valuable.

To share your feedback, go to [Success Kit Feedback](#) or scan the QR code.





Guidebook content map for Project Managers

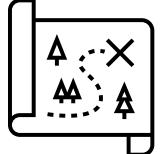


Here is what may be important to you and these sections will help
Get a better understanding of frontline worker needs and role.	1.1
Understand what makes a truly valuable solution with the power to transform	1.2
Understand an approach you could take to building valuable solutions for your frontline workers.	1.3
Starting your journey to valuable Teams solutions for Frontline.	2.1
Discovering the problem worth solving – putting the why before the how.	2.2
Envision – planning the building blocks of your solution.	2.3
Build solution prototype.	3.1
Validate through pilot.	3.1

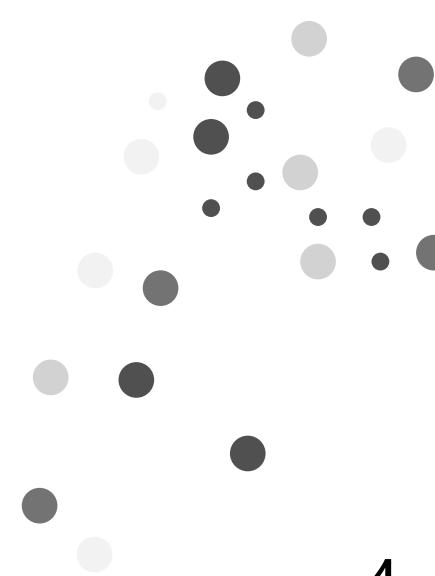




Guidebook content map for Change Managers

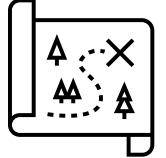


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Validate through pilot.	3.2

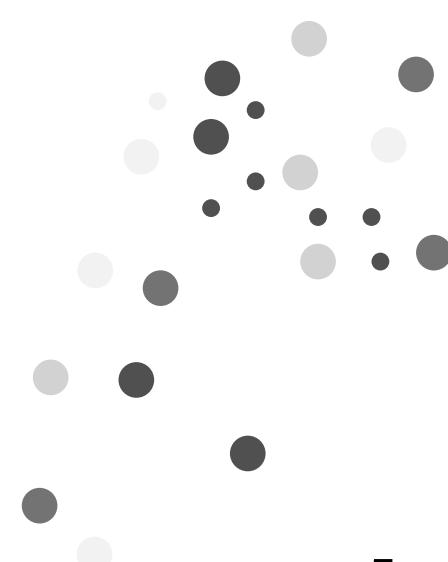




Guidebook content map for Business Leaders

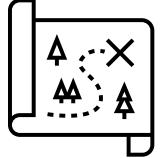


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Get a better understanding of frontline worker needs and role.	1.1
Understand what makes a truly valuable solution with the power to transform	1.2
Envision – planning the building blocks of your solution.	2.3
Adopt at scale, optimise and iterate. Best practices and final thoughts.	3.3





Guidebook content map for Technical Leaders



Here is what may be important to you and these sections will help
Starting your journey to valuable Teams solutions for Frontline.	2.1
Envision – planning the building blocks of your solution.	2.3
Build solution prototype.	3.1

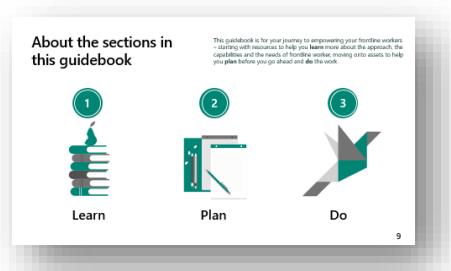


What's inside

How your success kit is structured

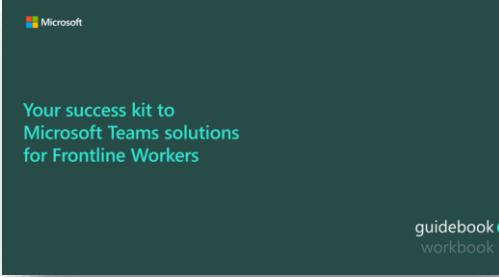
How to use this guidebook

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

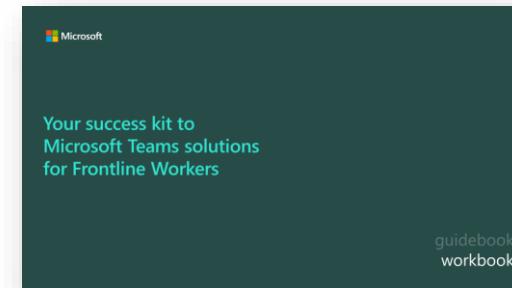


How your success kit is structured

You are here!



1. guidebook



2. workbook



3. supporting_assets — 3.2 project_plan

3.3 lookbook

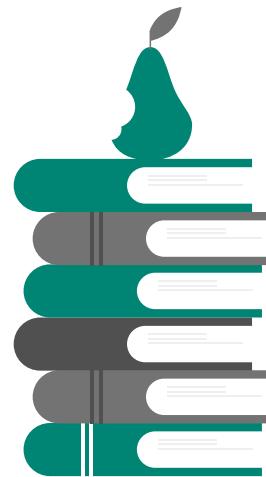
3.4 adoption_sample_assets



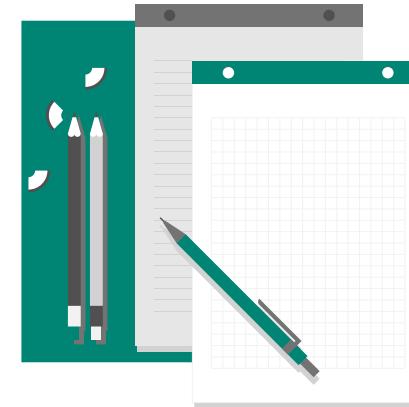
Coming soon! Check back at aka.ms/TeamsFLWSuccessKit

About the sections in this guidebook

This guidebook is for your journey to empowering your frontline workers – starting with resources to help you **learn** more about the approach, the capabilities and the needs of frontline worker, moving onto assets to help you **plan** before you go ahead and **do** the work.



Learn



Plan

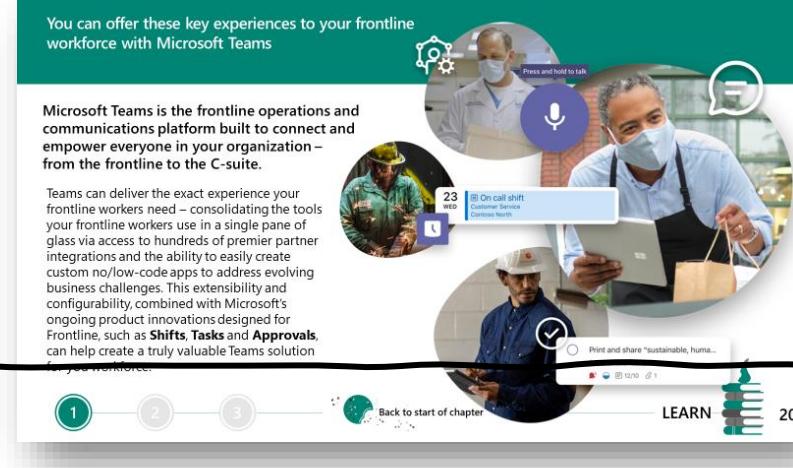


Do

How to interact with this guidebook

In this kit asset, there are 3 main sections: Learn, Plan & Do

Sections are signposted here



What to expect from this chapter

Objective

- 1 Get a better understanding of frontline worker needs and role.
- 2 Understand what makes a truly valuable solution with the power to transform.
- 3 Understand how to build a solution that's truly valuable.

Key takeaways

- 1.1 Frontline workers are an essential part of your organization—they are the first to engage your customers, the first to see products and services in action, and the first to represent your brand.
- 1.2 Yet, many frontline workers find themselves held back by legacy tools, often being the last to experience the benefits of modern technologies enjoyed by the desk worker counterparts.
- 1.3 When designing experiences for frontline workers, we can think of these in terms of a hierarchy of needs.

To help you succeed, you can leverage a proven approach to developing a truly valuable solution in Teams.

Start → Discover → Envision → Build → Grow

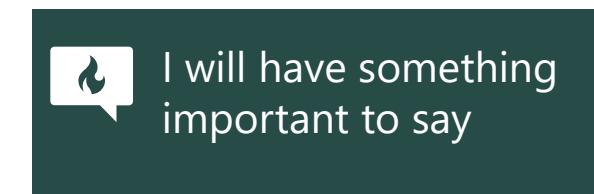
- Calibrate your compass
- Put the why before the how
- Choose solution building blocks
- Build solution prototype and validate through pilot
- Adopt at scale, optimise and iterate

Each section will have an objectives page and a key takeaway page at the end of the section.

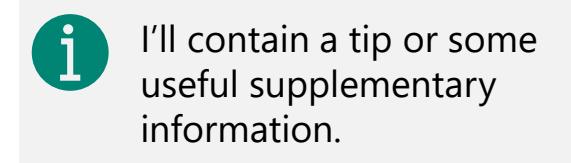


You'll find references to relevant pages in your companion workbook at the top of the page.

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



I will have something important to say



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

1



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What to expect from this chapter



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Objective

- 1 Get a better understanding of frontline worker needs and role.
- 2 Understand what makes a truly valuable solution with the power to transform.
- 3 Understand an approach you could take to building valuable solutions for your Frontline workers.

1



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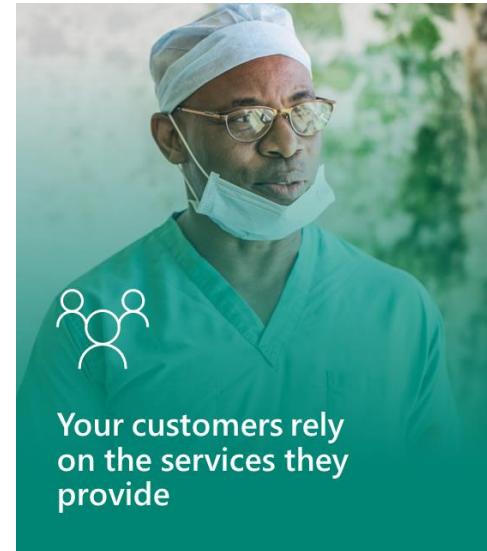
Understanding frontline workers needs

Frontline worker are an essential part of your organization

Frontline workers often make up the majority of the workforce and are in roles where they are the first to engage your customers, the first to see products and services in action, and the first to represent your brand.

With COVID-19 continuing to impact people and countries around the world, organizations are pivoting to remote work and putting the safety of their employees, customers and communities first.

One group of employees that are particularly impacted are Frontline Workers. These workers are the backbone of all major industries and compose the majority of the global workforce. They exist in large numbers in the Retail, Manufacturing, Travel & Hospitality, Healthcare and Government sectors.



Your customers rely
on the services they
provide

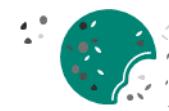


Your business depends
on the operational tasks
they perform



Your brand &
reputation is based
on their success

It is the ambition, creativity and action of frontline workers that can unlock new ideas, differentiate the customer experience, and bring the strategies of your organization to life.



What problems frontline workers face



Frontline workers are held back by legacy communications tools that don't understand frontline needs.

Frontline workers are frustrated to find **their access is limited or denied** as organizations react to the challenges of frontline data security with restrictive policies.

The front line is a dynamic, fast-paced environment, and frontline workers don't have time to **juggle multiple apps for job-related tasks**.

Many frontline workers **lack the control over their employee experience** enjoyed by desk worker counterparts. Shift and time management are time-consuming, tedious tasks, and opportunities to upskill are constrained by legacy systems.

Frontline workers are often the last to enjoy the benefits of new technologies. Many frontline workers **still spend significant time on tedious repetitive tasks** that limit their efficiency and ability to drive increased customer value.



6 key employee experience areas

By addressing the obstacles faced by frontline workers you can:

- **Connect & engage your workforce.** Enrich communication and employee experiences by connecting employees with the right tools, people, and devices they need to do their best work and build skills faster.
- **Enhance workforce management.** Empower your people to meet fluctuating business needs by equipping workers with agile shift scheduling tools and seamless task management.
- **Increase operational efficiency.** Improve frontline efficiency by automating task & service processes with configurable apps and digital workflows.

To do this you can consider solutions that enable:

1. **Communication** connecting your frontline workers to enable them communicate and share information effectively
2. **Wellbeing & engagement** nurturing employee wellbeing and a sense of belonging
3. **Schedule management** for simplified and streamlined schedule co-ordination with frontline gaining not only visibility into their work schedules but also enabling them to arrange cover and leave
4. **Training & onboarding** promoting continual growth in your frontline workers and encouraging knowledge exchange
5. **Digitized processes** driving operational efficiency by digitizing paper-based process and automating routine and repetitive steps
6. **Digital Ecosystem** for true frontline agility and improvement of execution quality by uniting the technology your frontline workforce depends on behind a single pane of glass for a seamless end-to-end experience.

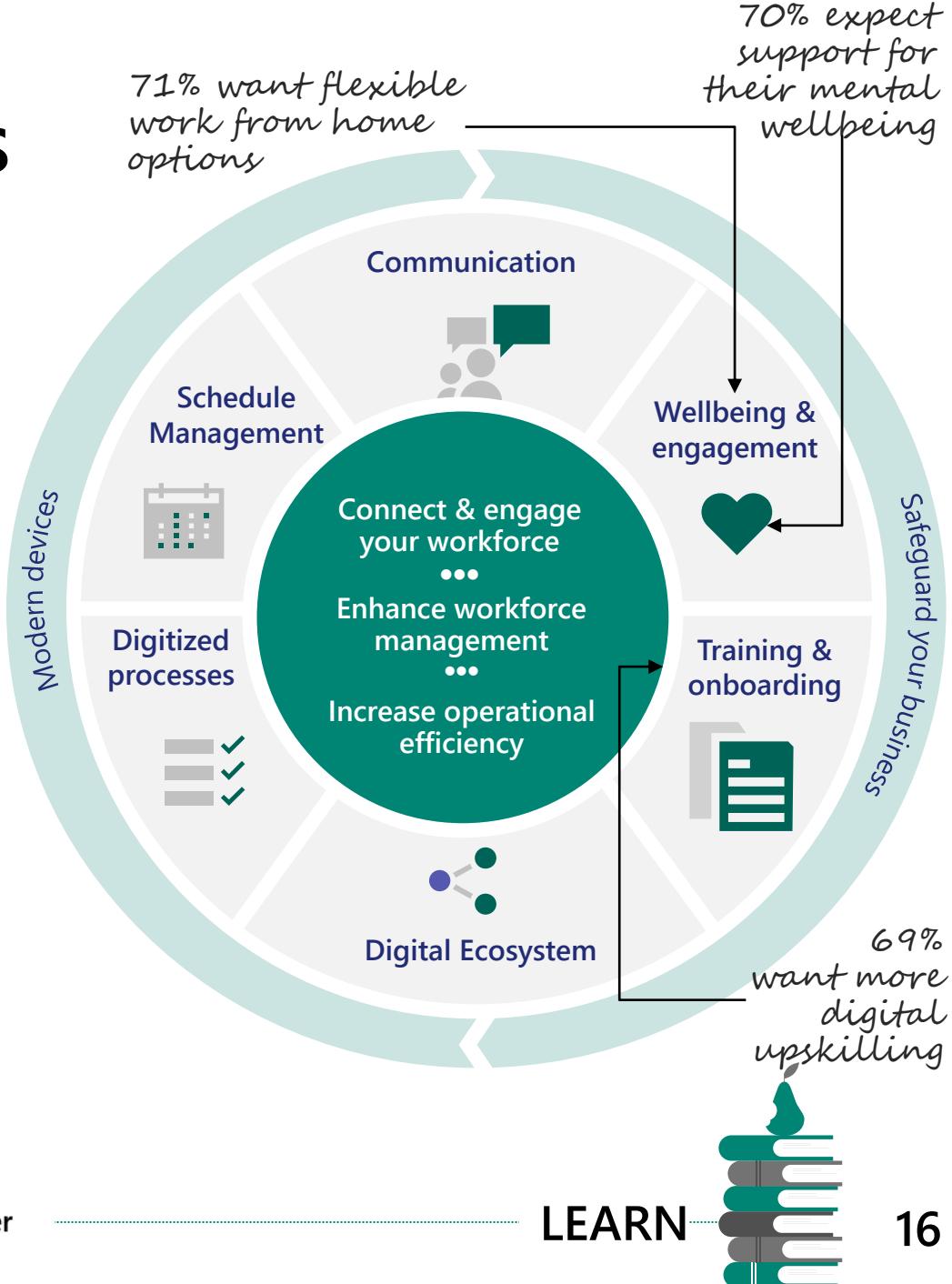
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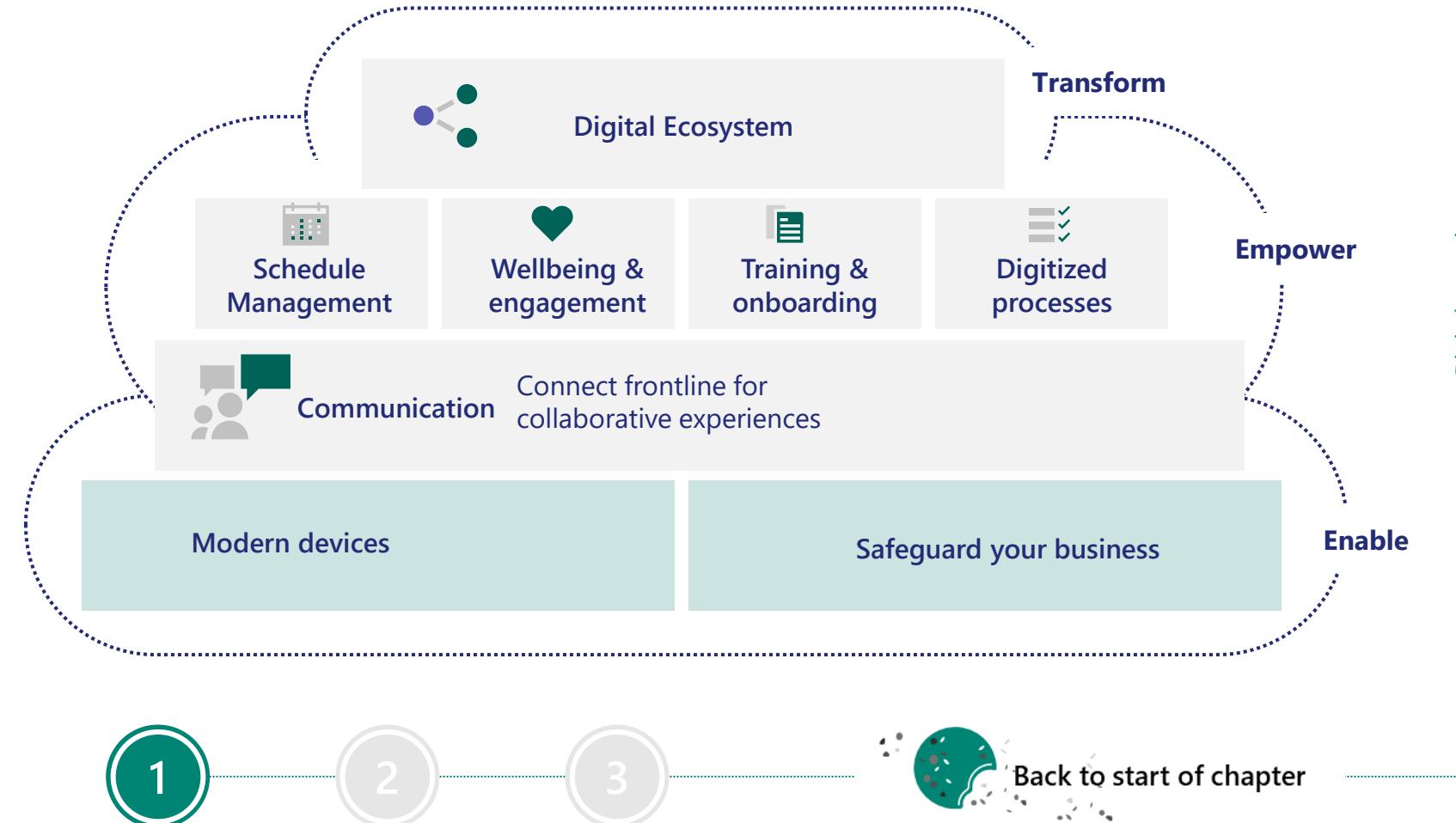
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We can think of these key experience areas in terms of a hierarchy of needs:

Starting with the foundations of digitally *enabling* frontline workers

Followed by *empowering* frontline workers to get the job done whilst nurturing true engagement
To ultimately *transform* frontline workforce with a truly digital ecosystem



The aim is to get to the top of the hierarchy – getting more value for your frontline, your customers and your organization overall – but you need to make sure that you address the lower levels of the hierarchy first.

Microsoft has made several investments in their products and services to help you do just that.



LEARN

You can offer these key experiences to your frontline workforce with Microsoft Teams

Microsoft Teams is the frontline operations and communications platform built to connect and empower everyone in your organization – from the frontline to the C-suite.

Teams can deliver the exact experience your frontline workers need – consolidating the tools your frontline workers use in a single pane of glass via access to hundreds of premier partner integrations and the ability to easily create custom no/low-code apps to address evolving business challenges. This extensibility and configurability, combined with Microsoft's ongoing product innovations designed for Frontline, such as **Shifts, Tasks and Approvals**, can help create a truly valuable Teams solution for you workforce.





We'll learn more about these building blocks later in this guidebook. If you want to skip ahead, go to



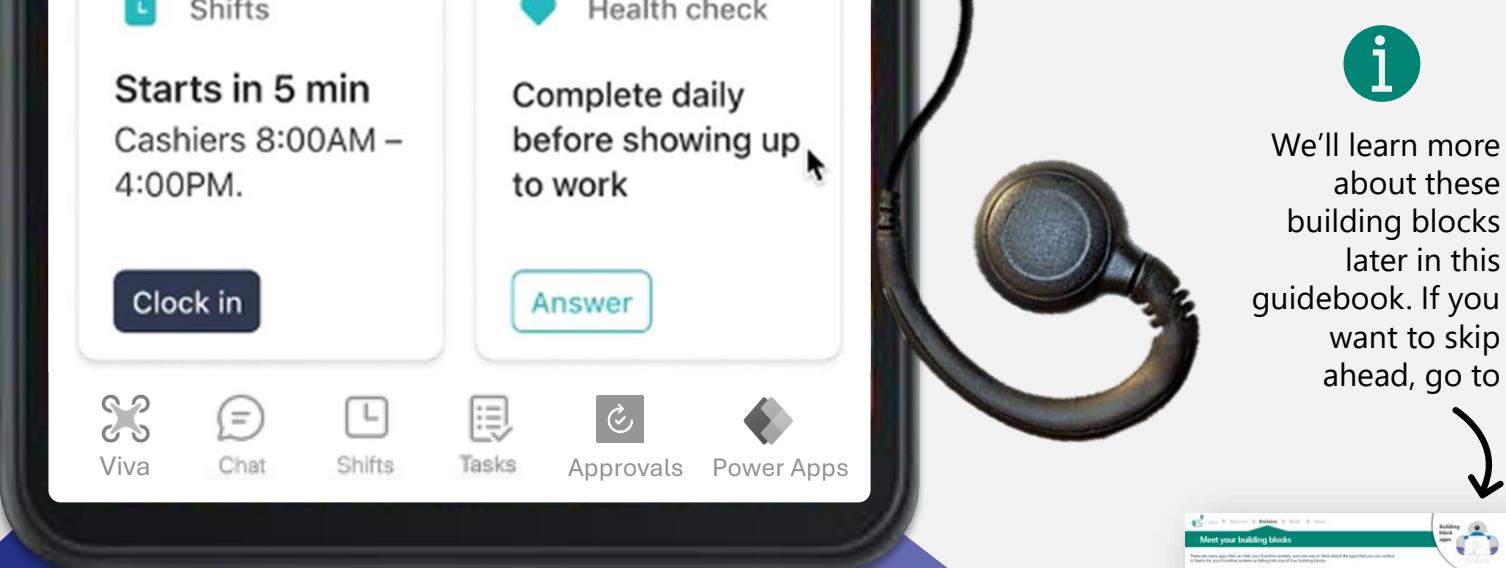
You do this by building solutions with a combination of:

(1) Ready-made blocks

and

(2) Custom blocks

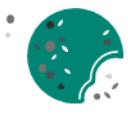
... surfaced in Microsoft Teams.



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But before we get to how we use Teams to enable, empower and transform your frontline workforce, let's establish what makes solutions valuable with the power to encourage the change you are looking for.





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

What makes solutions valuable

**Valuable
solutions
solve real
problems**

As much as we'd love to think about products and technology as being valuable in themselves, that's not the case. The value of a product or service is defined by the person using the service and product to solve a specific problem – the better the solution is at solving a real painful problem the more valuable that solution is!

And that's how we can think about the potential value of Microsoft Teams solutions for your frontline workers – the better they are at solving their real problems, the more valuable they are!

This is the reason why we encourage you to really explore the problem space and develop empathy and understanding of the daily lived experience of your frontline workers. And later in the guidebook, we'll cover how you can do that for your workforce.

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What makes solutions with the power to transform

Transformation isn't something that organizations actually do, it's something that people do – transformation happens in the multitude of decisions people in your team, your department, your company's frontline make every day.

Transformation happens in decisions people make every day

So, what does it take to persuade people to change the way of thinking and acting – to go from what they know today and take a risk with something new!

There are many change methodologies that we can rely on to help make sure we tackle the human element of any change in behaviour.

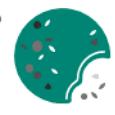
To illustrate, let's flip a virtual coin – if it's head, you win \$100, and if it's tails you lose \$100. Will you be willing to play? We know from social experiments, that most people would hesitate, and on average people are more willing to take a risk of losing their \$100 dollars only when they have a chance of winning \$260. That's an expected win/benefit of 2.6 times the potential loss.

How does this play into solutions for frontline? Well, when we introduce new tools, new ways to collaborate, we are asking frontline workers to give up something, to stop doing something like using a consumer chat apps or even paper-based processes. They may not be ideal solutions, but they work, and we can assume a certain level of comfort has been established with the status quo. So, when thinking about a solution with the power to entice, think about what that solution would look like to offer that 2.6 times the current frontline worker experience. This is where it's helpful to think of the holistic lived experience of frontline through the lens of the 6 core employee experience areas we've introduced earlier.

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Practical approach to building valuable
Microsoft Teams solutions for your Frontline
workers.

Journey to valuable Teams solutions

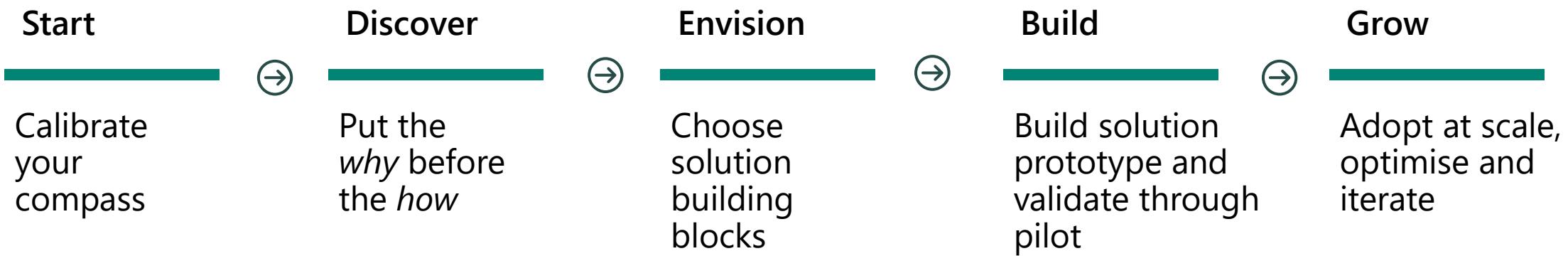
So, what does the journey to valuable solutions looks like? And how do we make sure they get adopted?

Here is a tried and tested journey that you can leverage to ensure that the outcome of your frontline empowerment project produces:

1. Solutions that solve real problems
2. Solutions that offer 2.6 X the current experience

We can tackle (1) by making sure that before we get to the how we focus on the problem worth solving which is where the **Discover** stage of the journey comes in. And we make sure that we get the (2) by developing the empathy and understanding the current experience at **Discover** and then validating the value of what we have built through a pilot at **Build**.

In the pages that follow in this section of the guidebook, you'll find details of objective, success indicators and key outcomes you can expect at each stage.



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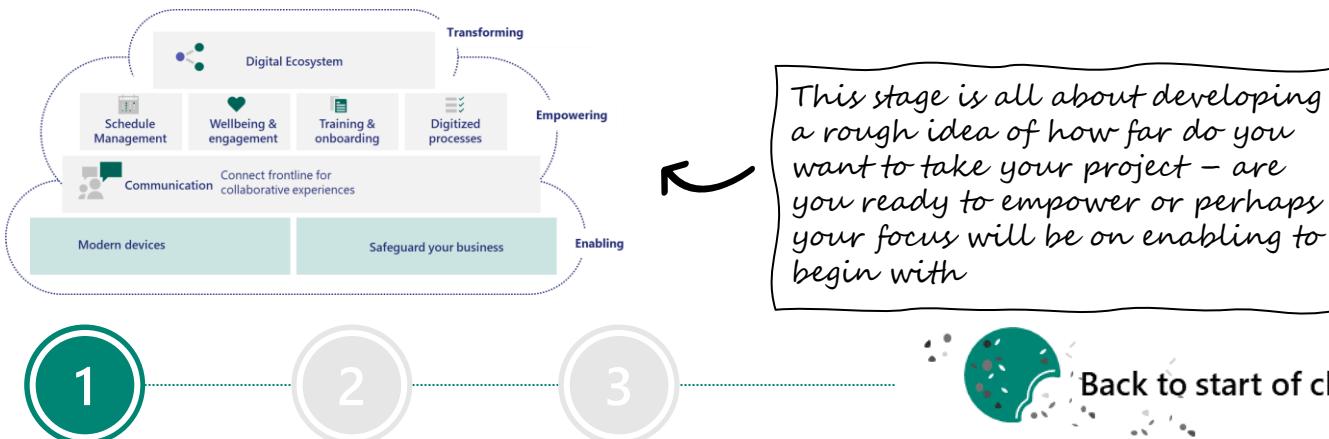
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Objective

Readiness to engage and execute next stages

Success indicators

1. Alignment on motivation for frontline worker enablement with Microsoft Teams
2. Potential blockers to the project (i.e. complexities, risks) identified
3. Core stakeholders – business, IT, and frontline decision makers – identified
4. Other in-progress initiatives related to frontline workers identified and impact understood

**Key outcomes**

- ✓ Initial assessment of frontline worker experience
- ✓ Figuring out *your big why* for doing this work
- ✓ Familiarity with your frontline workforce – what roles would you describe as frontline in your organization? How are they structured in your organization?
- ✓ List of assumptions, knowns and unknowns to help you map your next steps
- ✓ Gather your main project team



Objective

Consensus on “What’s needed by whom and why?” to align on what would be of value to the frontline workers

Success indicators

1. Definition of what's needed and why through persona and problem analysis
2. Agreement on what's needed and why by the frontline workforce through stories
3. Current workarounds and gaps understood
4. Clear, confirmed “What’s in it for me?” for every persona you’ve identified the solution will serve

Key outcomes

- ✓ Documented scenarios and problem statements, personas, and 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



Objective

Identify best solution leveraging frontline building blocks

Success indicators

1. Mapping of apps and capabilities that light up key scenarios and user stories
2. Evaluate solution and sizing with architecture and building blocks defined
3. License needs identified based on confirmed scenarios and user stories
4. Ensure devices and peripherals support the scenarios and user stories
 - **Decision:** how frontlines will access Teams app – will they install it themselves or will app be pushed on their device.
 - **Decision:** how frontlines will log in to Teams and manage their identity going forward
 - **Decision:** device, application, and data security – approach to bring-you-own, corporate shared, and assigned device

Key outcomes

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



Objective

Build solution prototype and validate through a pilot

Success indicators

1. Technical enablement for identity, device, security, and compliance
2. Established Team and channel structure including membership strategy (dynamic, static, naming conventions)
3. Define frontline worker / frontline manager roles in Teams (owner vs. member) and related settings (e.g. permissions for channel creation)
4. Ongoing content strategy established
5. Building block apps enabled, deployed and published
6. Messaging experience configured and Teams policies defined
7. Conduct pilot with frontline workforce and relevant roles, gather feedback
8. Adjust solution based on pilot feedback to lock @scale implementation plan

Key outcomes

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



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Objective

Solution adopted at scale and value you'd hoped to create for frontline workforce is realized

Success indicators

1. Adjust (if applicable) and execute technical enablement and adoption plan for scale
2. Establish ongoing maintenance and governance
3. Plan for continuous education and frontline workforce readiness
4. Expand scenarios (potential upsell, back to Discover)

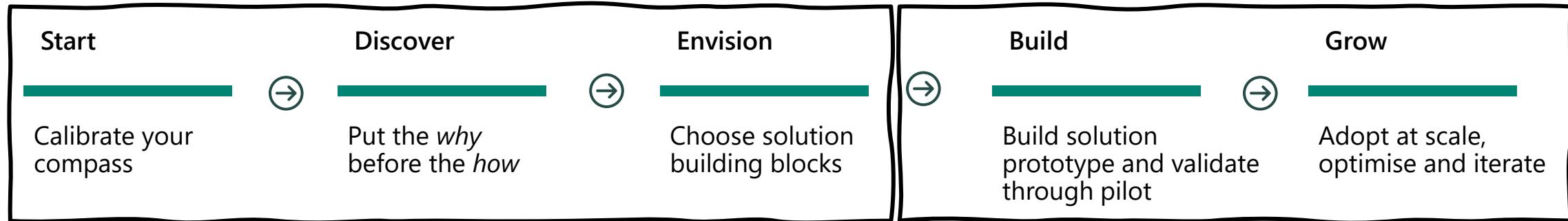
Key outcomes

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



Journey to valuable Teams solutions

Let's delve into an approach you can use to build some truly valuable solutions on Teams for your frontline workers



Chapter 2 is dedicated to these stages in the journey



Chapter 3 is dedicated to these stages in the journey

Start > Discover > Envision > Build > Grow

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.

Optional: 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 add 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 director 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.

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



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Key takeaways

1.1

Frontline workers are an essential part of your organization – they are the first to engage your customers, the first to see products and services in action, and the first to represent your brand.

Yet, many frontline workers find themselves held back by legacy tools, often being the last to experience the benefits of modern technologies enjoyed by the desk worker counterparts.

transforming

When designing experiences for frontline we can think of these in terms of a hierarchy of needs.

empowering

enabling

1.2

It's difficult to encourage anyone to embrace something new – to ensure our solution succeeds through adoption by your frontline workers, you need to make sure it solves a real problem of your frontline workers.

1.3

To help you succeed, you can leverage a proven approach to developing a truly valuable solution in Teams.



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Start

Calibrate your compass

Discover

Put the *why* before the *how*

Envision

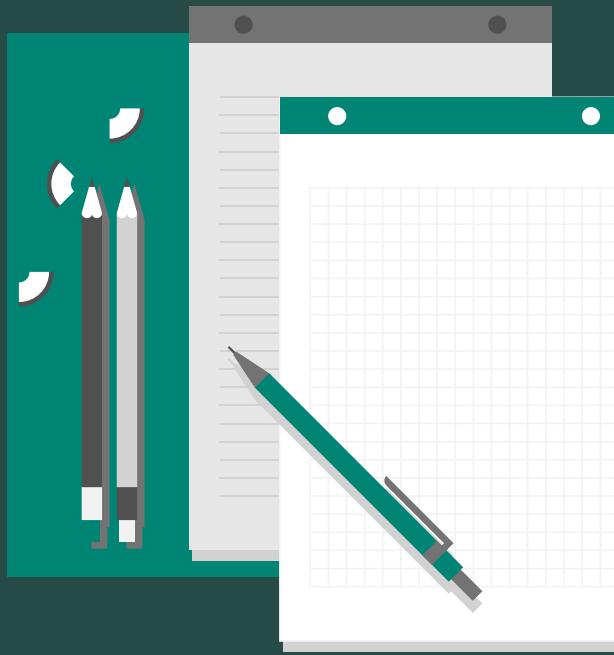
Choose solution building blocks

Build

Build solution prototype and validate through pilot

Grow

Adopt at scale, optimise and iterate



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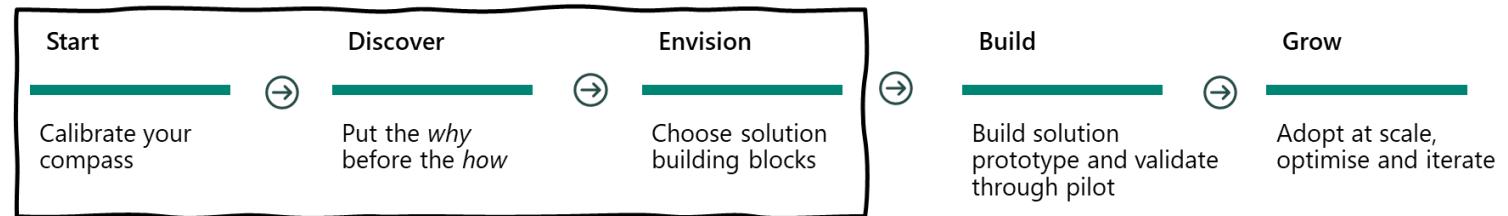
What to expect from this chapter



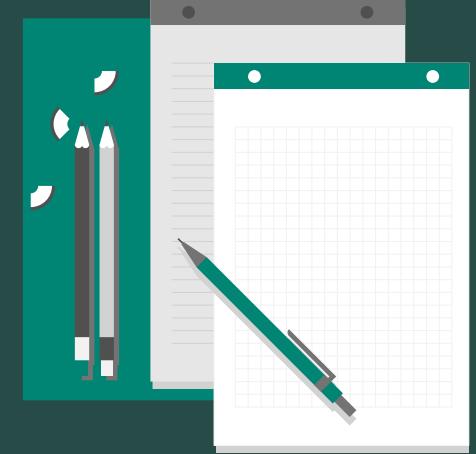
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Objective

- 1 Starting your journey to valuable Teams solutions for Frontline
- 2 Discovering the problem worth solving – putting the why before the how.
- 3 Envision – planning the building blocks of your solution.



This Chapter is dedicated to these stages in the journey



1

PLAN

Starting your journey to valuable Teams
solutions for Frontline



Gathering your people

There are three 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.
- (3) the **adoption team**, consisting of people responsible for driving adoption and change management including champions of your Microsoft Teams solution among your target frontline population

The common thread between these 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](#).

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

Primary stakeholders and their role in the project

 Business Decision Maker

- Executive sponsor
- Articulate the "why"

Technical Decision Maker

- Steer decisions on technology, security and compliance

IT Pro

- Admin rights to execute the technical tasks

Frontline Manager

- Integral to successful adoption
- Content providers / last mile configuration
- End-user

Frontline Worker

- End-user
- Their feedback is critical

Adoption and Change Manager

- Drives adoptions and user readiness

Project Manager

- Manage the project end to end

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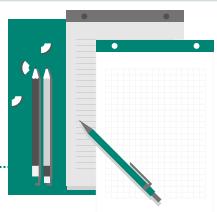
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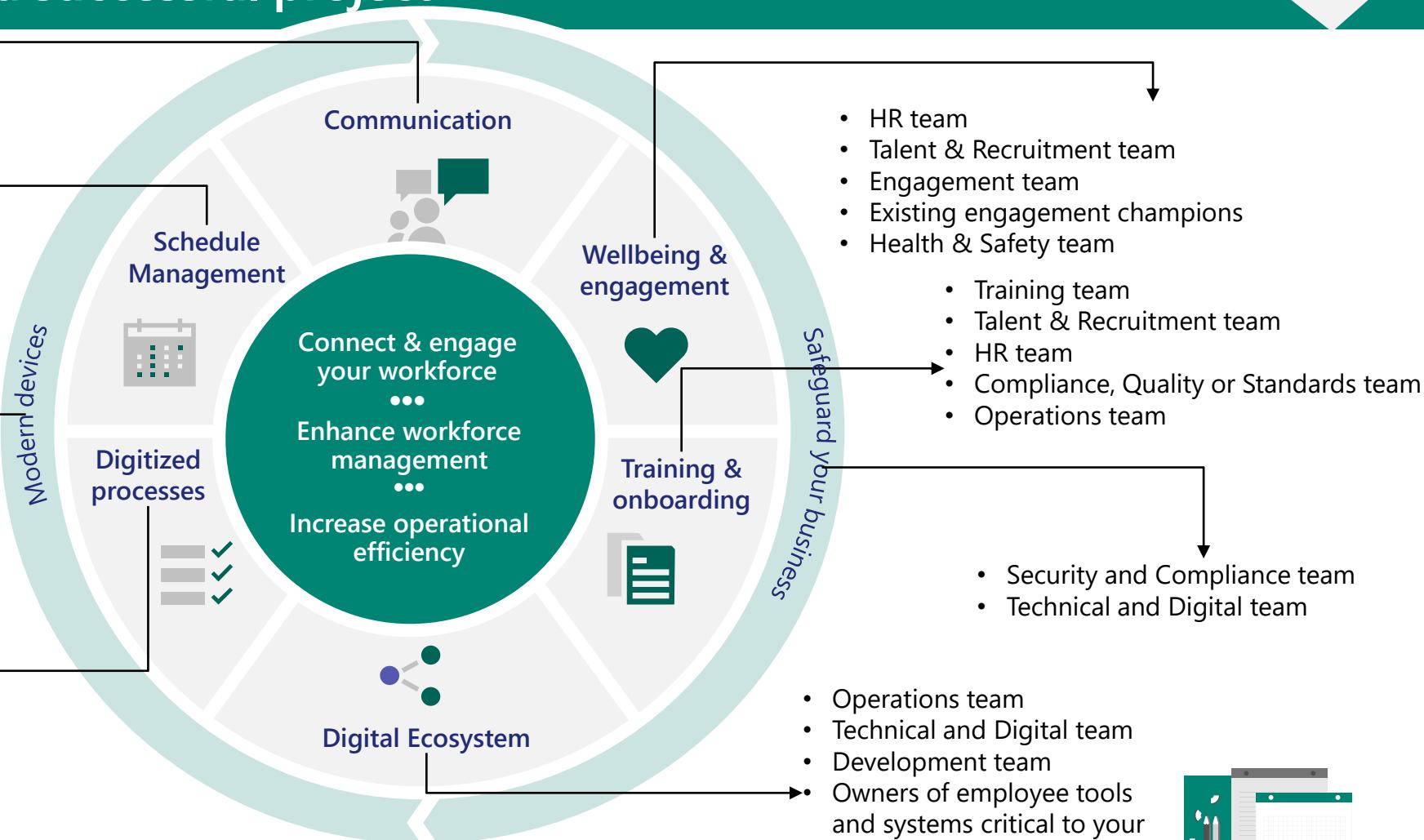
Teams to engage with for a successful project

- Internal communications team
- HR team
- Operations team

- Schedule manager
- HR team
- Payroll team
- Schedule system / WFM system owner

- Technical Devices lead
- Procurement team
- Operations team
 - Operations team
 - Process owners

If applicable, it is critical to engage with the relevant Trade and Labor relations stakeholders.



1

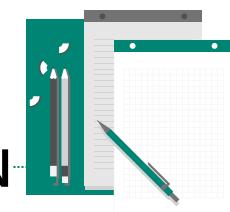
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Your BIG why – what's your goal?

Your BIG why is your overall goal for embarking on this journey.

Goals define the outcome you want and enable you to measure the success of the project.

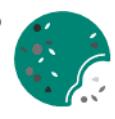
Goals can be defined as objectives and key results (OKRs), and the measures of project success can be defined as key success indicators (KSI).

Goals should include a mix of **technical** and **frontline/business-focused** success.



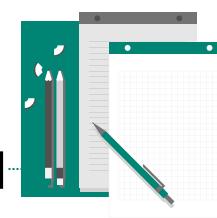
It's essential that you get full participation from project stakeholders in defining OKRs and KSI, to help ensure they feel a sense of ownership and align these measures of success to defined project tasks.

- OKRs contain the objectives you set at the beginning of the project and the key results you measure on a defined cadence (for example, monthly or quarterly).
- KSI measure quality and success of the key results and complement the binary nature of OKRs by detailing good and/or bad results. When defining KSI, we recommend that you use "specific, measurable, assignable, realistic, time-related" (SMART) criteria:
 - ✓ **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



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Your BIG why – what's your goal?



You may need to revisit your OKRs as you go through discover and envisioning.

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 a sense of belonging
- **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.

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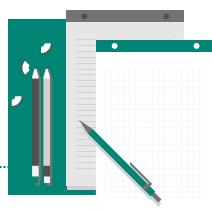
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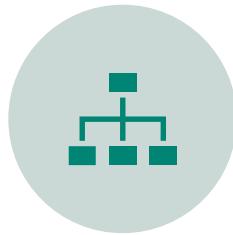
Inventory of facts

It is also very helpful at this stage to understand what is actually known about the frontline workers, their current experience and what are potentially assumptions or unknowns.

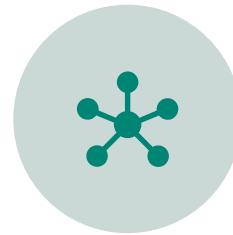
This inventory of frontline facts will help you scope the activities to focus on in **Discover**.



Numbers



Structure

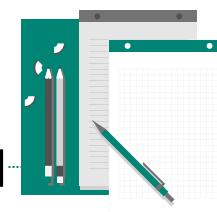


Technology and
Connectivity profile



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PLAN

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



Discovery is all about figuring out ...

What's needed



You can get to the “what” by assessing the experience of your frontline workers across key experience areas we’ve introduced in our first module.

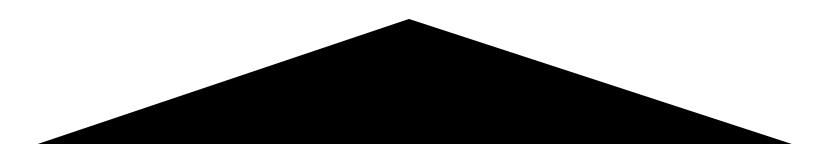
- Your **Discover** exercises help you find the answer to this question.
- One way to capture the output of your discovery is with *stories*.
- Stories are a great way to describe the end-to-end experiences you want to bring to life in Teams for your frontline workers.

by whom



You can get to the “who” by doing *persona* analysis.

and why



You can get to the “why” by exploring the problem space to understand the impact of the problem that you’ll be solving with Teams.

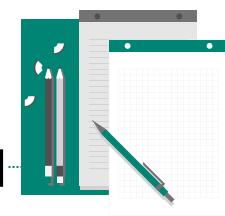


You can think of **Discover** stage as a fact-finding mission – helping you turn all the assumptions and *unknowns* you may have about your frontline workforce and their daily experience on the job into *knowns*.



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Discovery of technical landscape, connectivity and communications needs
Understanding what connections needs to be made to facilitate communication – which groups need to be formed

Assessment of the needs of frontline when it comes to how they are engaged, how they feel about the role and what they do.
Explore challenges that frontline may face with the way they manage their schedules and understand any overheads involved in the current process of schedule and cover management.
Understanding onboarding and training needs.
Moving off paper-based processes.

Understanding LoB apps that can be surfaced in Teams for novel insights and application.
Ecosystem encompassing external resources and people.

transform

... frontline workforce with a truly digital ecosystem

- **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 to keep them engaged and invested
- **Digitized processes** to drive operational efficiency by automating routine and repetitive processes.

Although there are some well-understood challenges of the frontline workers that can map to scenarios (which we share with you in the next sections), but every organisation is unique, and we recommend you don't bypass your discovery activities.

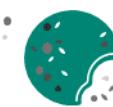
enable

... 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



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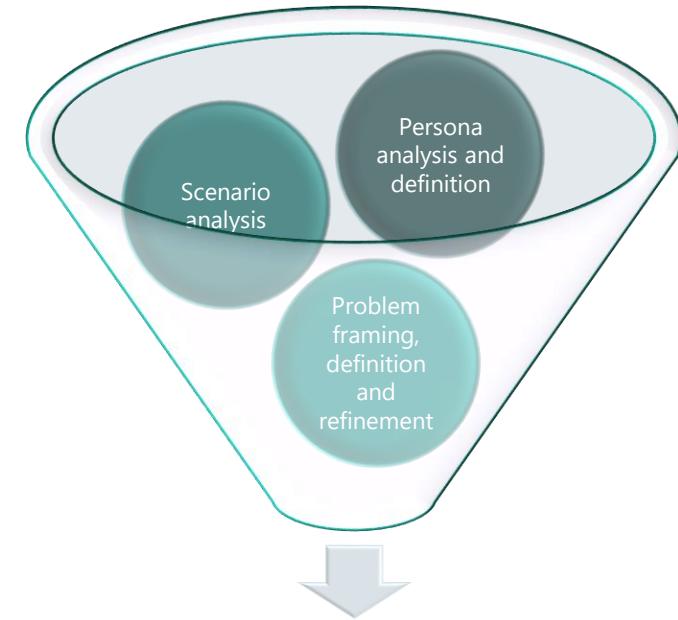
What needs solving in my organization?

There are multiple approaches to framing the problem that needs solving.

You can:

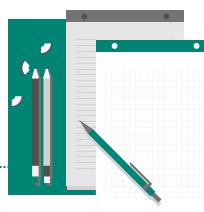
- Get to the problem through detailed **persona analysis**. This is the activity that helps with a shared understanding about the frontline workers' needs and challenges.
- Get to the problem through detailed **scenario analysis** which is especially useful if you are trying to improve a particular outcome.
- You could also across the 6 experience areas, conduct **problem definition**, starting with areas for a given frontline role that are particularly dissatisfactory.
- Further refine your problem statement through **problem framing** activities.

On the next page, you'll find the typical focus of **Discover** activities based on where you are in terms of digital maturity and enabling your frontline hierarchy of needs.



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Writing stories

Stories provide a narrative from a human perspective and have three key components:

One.

Tells us more about the human – Persona

Who is the user that benefits?

Two.

Tells us about the need

What can the user do that they couldn't do before?

Three.

User Reason/Business Value

How does this change benefit the user or the business?

You can use a formula for expressing user stories ...

who what why

is involved in the scenarios and processes? do they do as part of the scenario and process? they do what they do?

→ "As a [persona], I [want to], so that]."

... or if you are starting with personas ...

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

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



Example

Tells us more about the human – Persona

Tells us about the need

User Reason/Business Value

Digitize request for expert form



As a production line lead, I can request support from experts using an online form that would cut the time to line issue resolution.



As a production line lead, when an issue on the line occurs, I can escalate to request support without needing to repeat the issue details and expect to connect to the relevant expert who would help me troubleshoot so that the current waiting time of >3 days can be cut to >1 day.



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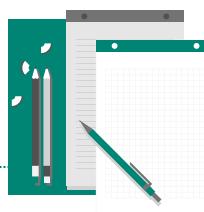
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Prioritizing stories

Kano analysis is just one of the techniques you could leverage to prioritize the scenarios that are important for your frontline workers.

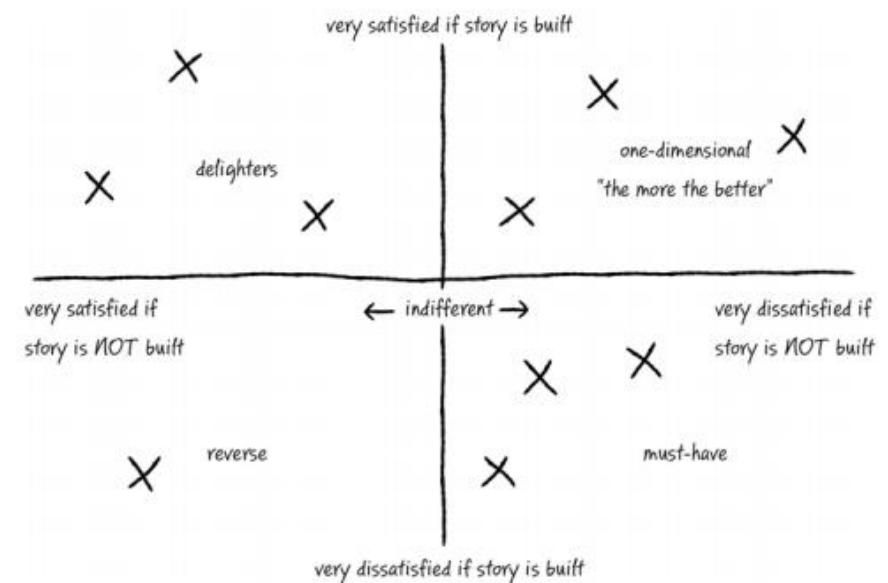
The basic approach is to take the list of proposed stories and ask a representative group of frontline workers two key questions about each story:

1. Thinking about the problem we've identified, how satisfied would you be if we built that story?
2. Thinking about the problem we've identified, how dissatisfied would you be if we did not build that story?

Frontline representatives, rate their satisfaction or dissatisfaction on a 3-point or 5-point scale. Then, you use those scores to group each story into one of five main buckets:

1. Must-haves
2. One-dimensional or "the more the better," these are the solid value stories.
3. Delighters
4. Indifferent
5. Reverse

The resulting chart is a nice way to visualize the differences between these kinds of stories and to give you some level of quantitative ranking between the stories within each bucket. If you want to pursue this approach, a quick web search will help you find the details for exactly how to tabulate results and create a Kano chart.





Sponsorship for greater adoption

Executives have the greatest influence on culture, and their participation is essential in driving employees' adoption of new technologies. Organizations that secure **executive sponsors** to actively communicate the value and benefit of digitally enabling frontline worker are more likely to be successful with their efforts to enable, empower and transform the frontline workforce. Executive support is an essential aspect of driving end-user adoption.

Another key sponsor to get on board is the **direct leader of the frontline workers**.

Executive sponsors should:

- Help the project team craft the overarching vision of Microsoft Teams for frontline by tying it to broader organizational objectives.
- Play a role in communicating the vision to other leaders across the organization.

Ensure they understand the ABCs

- A**ctive and visible participation
- B**uilding a coalition with their executive peers
- C**ommunicating directly with employees

1

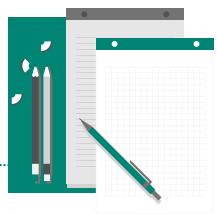
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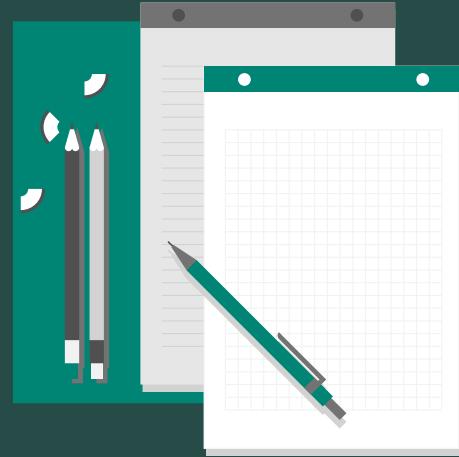
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2 3

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Envision – key decisions on all the building components for your solution.

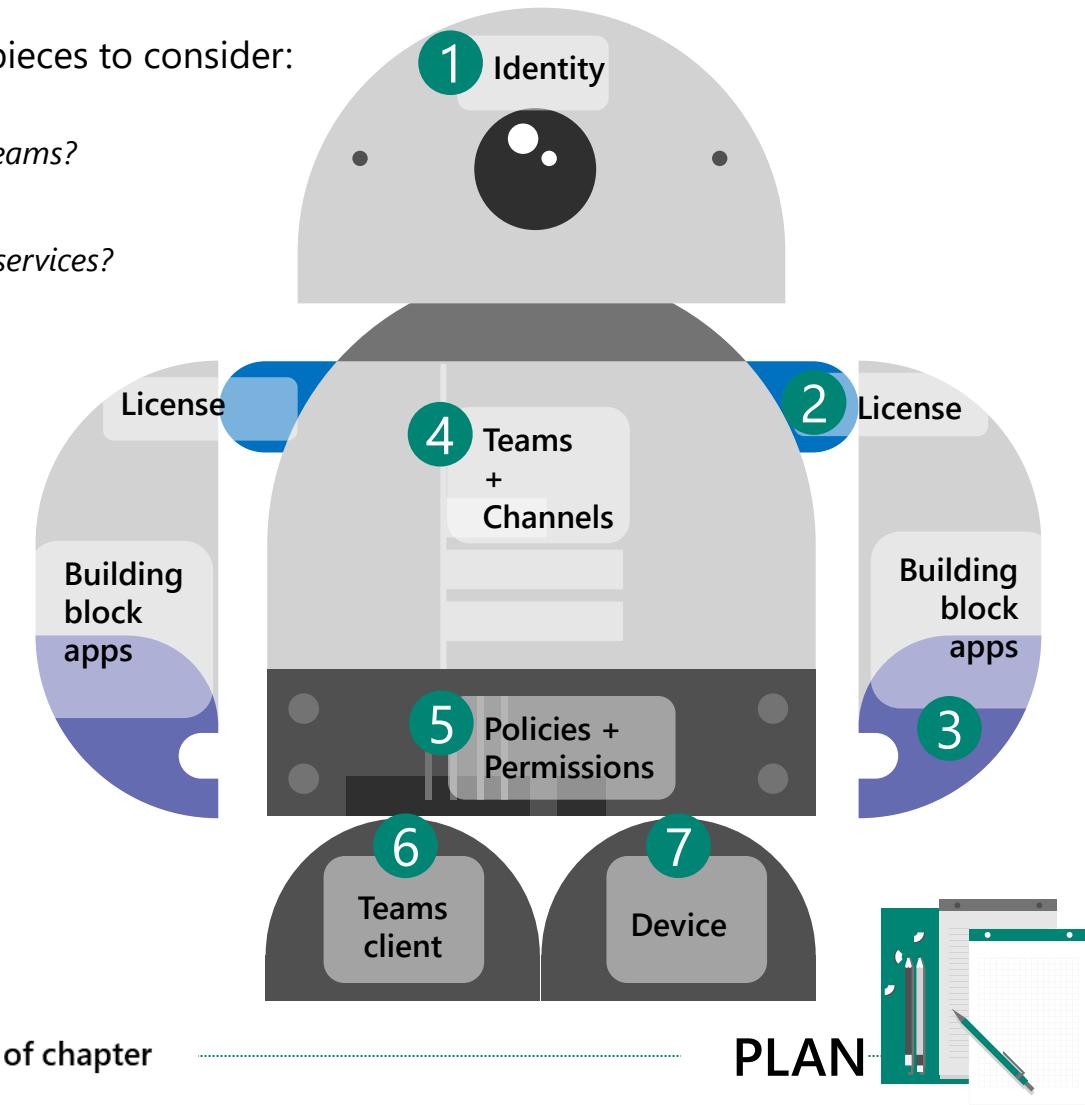


In Chapter 3, you'll find similar sections to this Chapter, but will contain how-to guidance and links to relevant implementation resources.

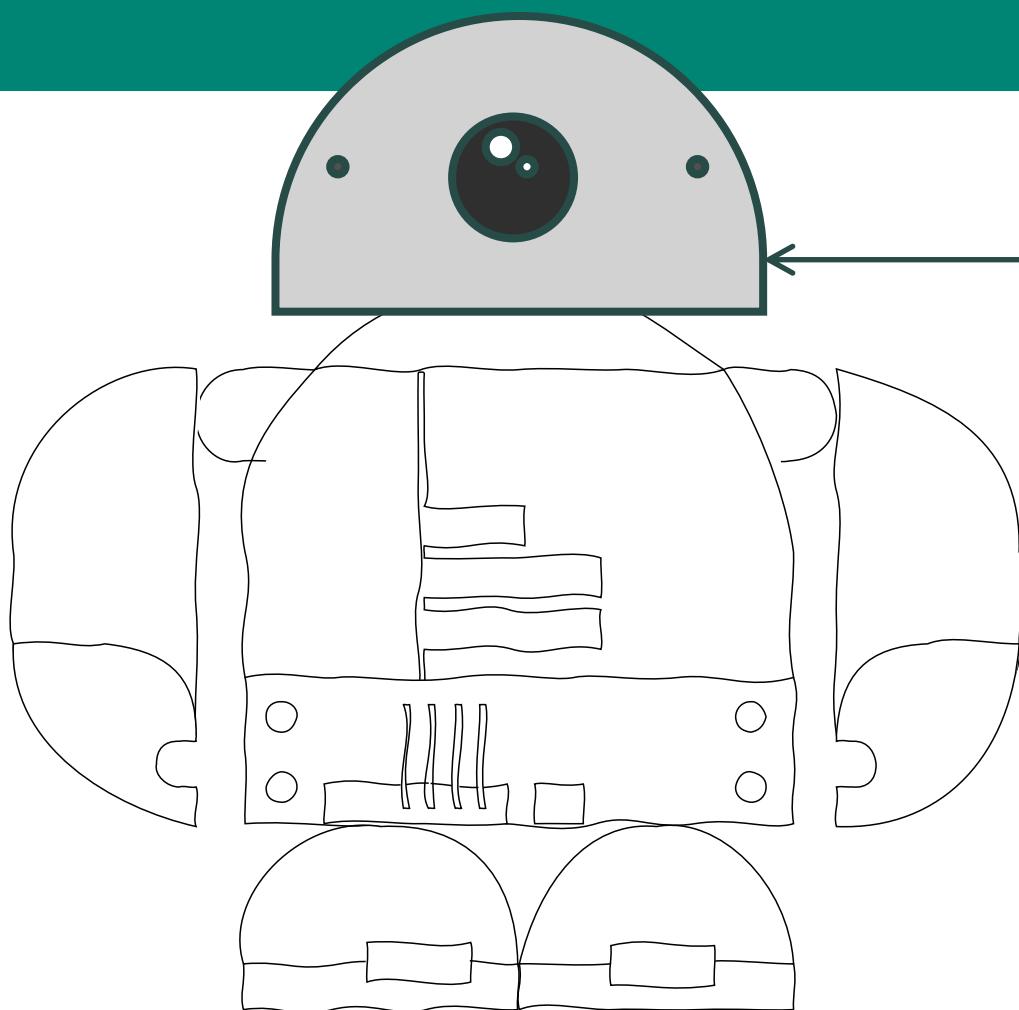
Envisioning a frontline solution to help Run yOur Business On Teams

When it comes to building your solution, there are a few implementation pieces to consider:

- 1 Identity *How will your frontline workers authenticate and access the solution on Teams?*
- 2 License *What license will you need to assign to your frontline to use the solution services?*
- 3 Building block apps *What building blocks – apps – will you need to deploy or configure to light up your solution?*
- 4 Teams + Channels *How does your Teams and Channel structure look like?*
- 5 Policies + Permissions *What policies and permissions will you need to put in place?*
- 6 Teams client *How will your frontline colleagues get to and install Teams client to access your solution?*
- 7 Device *What device and peripherals will you need for the solution to work?*



Implementing these enables and empowers your frontline – helping you run **your business on Teams** (see what we did there! ☺)



1

Identity

CONSIDERATIONS

Understanding identity models

•••

Creating user and group identities for
frontline workers

•••

Managing user and group identities for
frontline workers

•••

Determining sign-in methods based on risk
& managing frontline worker password
resets



PLAN

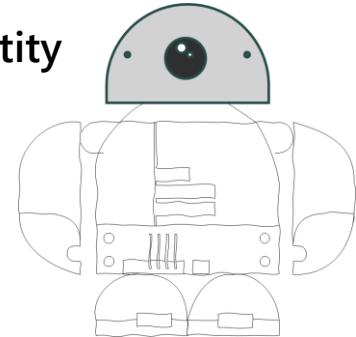
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Addressing the unique identity challenges of frontline workforce

With Microsoft 365 Azure Active Directory, identity is designed to address the unique challenges of both frontline workers as well as their managers, and their IT departments.



According to Microsoft research powered by Pulse in February 2020, **65% of IT executives identify security and compliance as their greatest challenges** when introducing technology to frontline workers.

Because frontline workers have often been left behind when it comes to digital transformation, many lack seamless access to the tools and data they need to be productive. They often don't have any form of credential or identity in organizational IT systems.

Microsoft 365 Azure Active Directory (Azure AD) is a cloud-based user identity and authentication service that is included with your Microsoft 365 subscription for Frontline workers.

Our investments in Azure Active Directory (Azure AD) reflect Microsoft's commitment to frontline workers. By proactively equipping frontline workers with access to the tools and technology they need on day one, IT leaders can accelerate productivity while protecting the organization with a strong identity foundation.

- **Understanding identity models**
- **Creating identities for frontline worker**
- **Managing identities for frontline workers**
- **Determining sign-in methods based on risk**

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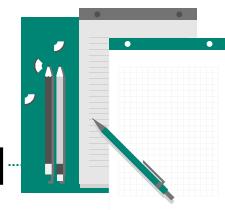
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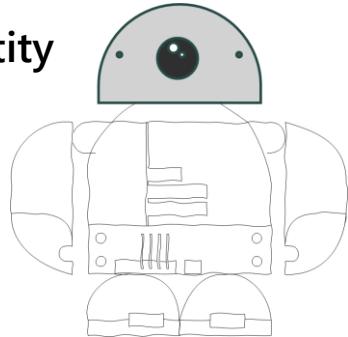
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Addressing the unique identity challenges of frontline workforce

Understanding identity models

Getting your identity infrastructure configured correctly is vital to managing frontline worker access and permissions for your organization. To plan for frontline worker accounts, you first need to understand the two identity models in Microsoft 365 and choose a model that fits best your frontline worker access needs.

You can learn more about identity models at [Microsoft 365 identity models](#) and [Azure Active Directory - Microsoft 365 Enterprise | Microsoft Docs](#).

Creating identities for frontline worker

You can create frontline worker identities in bulk and one at a time, using Microsoft 365 admin portal, Azure AD admin portal or PowerShell script. You will need to have the **User administrator** privileges to be able to create accounts. To facilitate seamless employee provisioning lifecycle, you can automate the process based on your HR systems that keep a record on your frontline workers.

Managing identities for frontline workers

Given the typical scale of frontline workforce, consider delegating some basic identity management to your frontline managers. With delegated user management, frontline managers can be granted access to a lightweight portal called **My Staff** that offers a simpler, user-friendly admin experience. From the **My Staff** portal, managers can unblock staff issues such as resetting passwords or enabling SMS sign-in by adding phone numbers without needing to call a corporate IT help desk.

Determining sign-in methods based on risk

Eliminating friction for the Frontline is critical to their productivity, as well as their security and compliance. Instead of burdening Frontline Workers with a username and password they may forget, especially if their lifecycle at the company is short, we think about ways to make signing in more seamless and intuitive, such as with a phone number and SMS one time passcode.

For example, enabling **SMS sign-in** allows frontline workers to sign in with one-time passcodes sent to their phone via SMS or text, eliminating the need to remember a username and password for Microsoft Teams, custom line-of-business (LoB), or other SaaS apps.

Highly regulated industries where frontline workers encounter sensitive data, such as patient information, may require stronger phishing-resistant options. For these scenarios, IT leaders may consider using FIDO2 security keys—a Fast Identity Online (FIDO) standards-based passwordless authentication method that can come in any form factor, such as an external security key or a platform key built into a device. Microsoft offers Windows Hello as a biometrics-enabled platform key, and also integrates with several FIDO2-compliant security keys from partners.



Forrester Research estimates large organizations spend up to \$1M per year to reset passwords.

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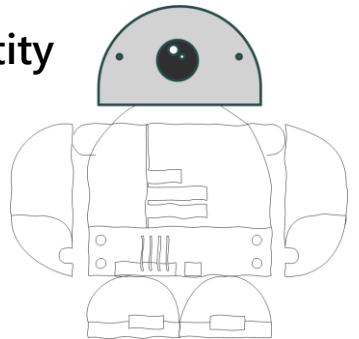
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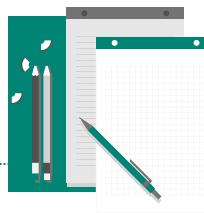
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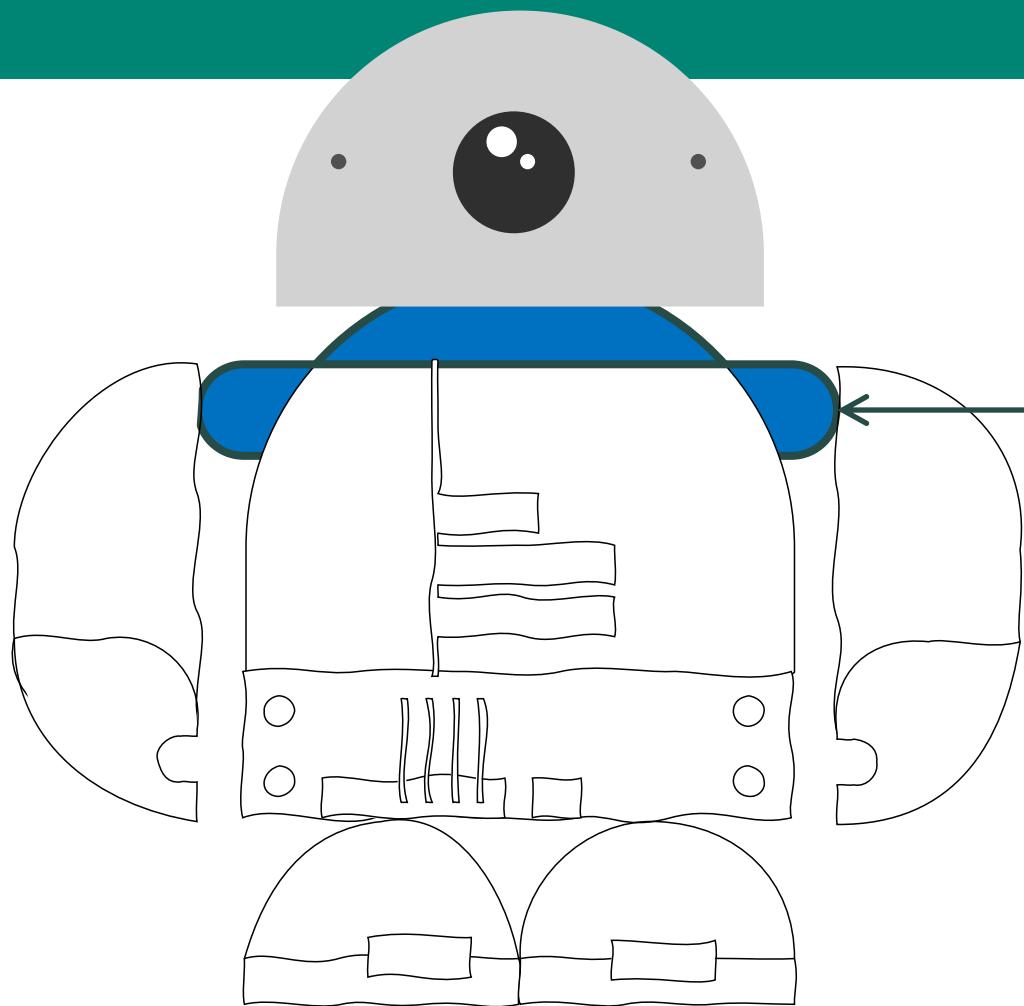


Determining sign-in methods based on risk

The following table outlines the security considerations for the available authentication methods. Availability is an indication of the user being able to use the authentication method, not of the service availability in Azure AD.

Authentication method	Security	Usability	Availability
Windows Hello for Business	High	High	High
Microsoft Authenticator app	High	High	High
FIDO2 security key	High	High	High
OATH hardware tokens (preview)	Medium	Medium	High
OATH software tokens	Medium	Medium	High
SMS	Medium	High	Medium
Voice	Medium	Medium	Medium
Password	Low	High	High





2

License

CONSIDERATIONS

Licensing your frontline workers with especially designed Microsoft 365 plans

...

Assignment of licenses



1

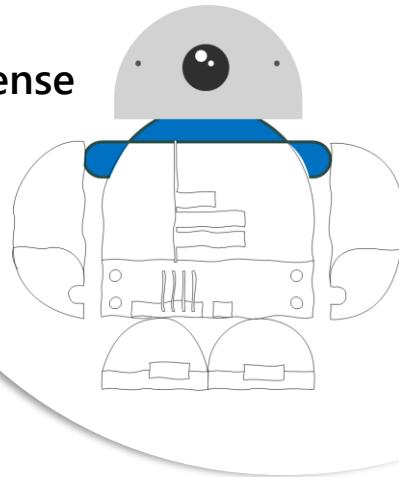
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Licensing your frontline workers

Microsoft Teams, part of Microsoft 365, are paid cloud services and require licenses. These licenses are assigned to each person on your organization who needs access to these services. To manage licenses, administrators use one of the management portals (Office or Azure) and PowerShell cmdlets. Azure Active Directory (Azure AD) is the underlying infrastructure that supports identity management for all Microsoft cloud services. Azure AD stores information about license assignment states for users.

Licenses can be assigned at the individual user level or to a group. There are three Microsoft 365 plans designed specifically for Frontline Workers.

Microsoft 365 F1

Lay the foundation for secure communication.
[Learn more](#)

Microsoft 365 F3

Drive productivity and collaboration.
[Learn more](#)

Office 365 F3

Engage your workforce.
[Learn more](#)

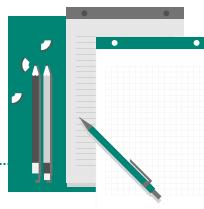


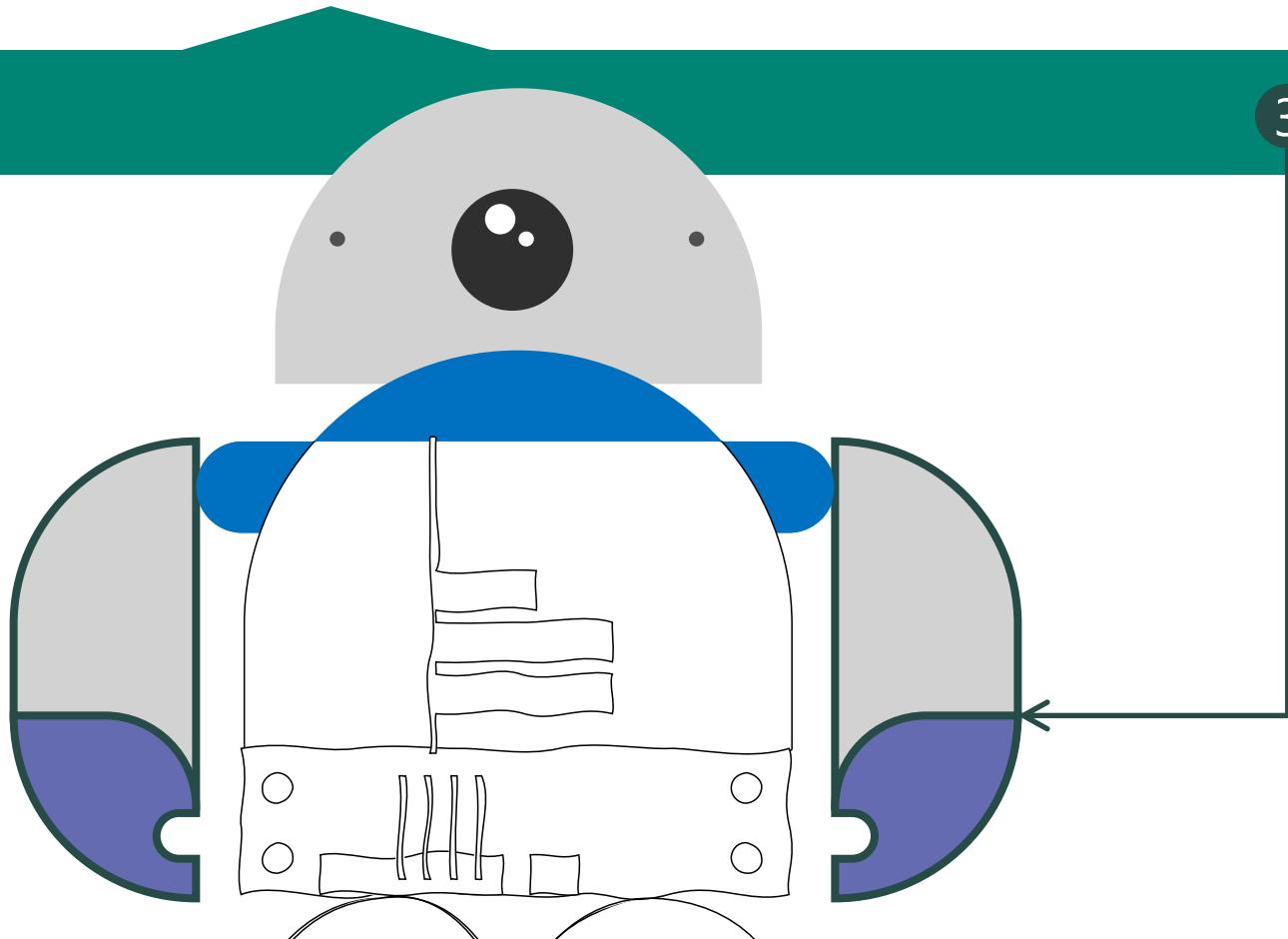
Learn more about Microsoft plans for frontline workers at [Microsoft 365 for Frontline Workers | Microsoft 365 F1 & F3](#) and [download the full comparison table](#)



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3

Building block apps

CONSIDERATIONS

How to think about apps that you can surface in Teams for your Frontline workers

•••

Choosing the building blocks to light up your solution

•••

Building blocks to enable

•••

Building blocks to empower

•••

Building blocks to transform

•••

Managing, configuring and deploying frontline worker apps in Teams

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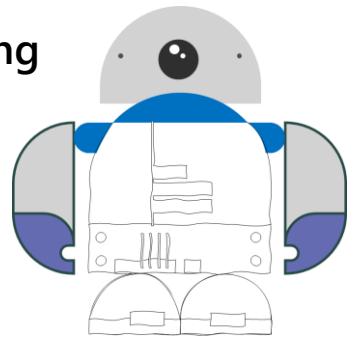
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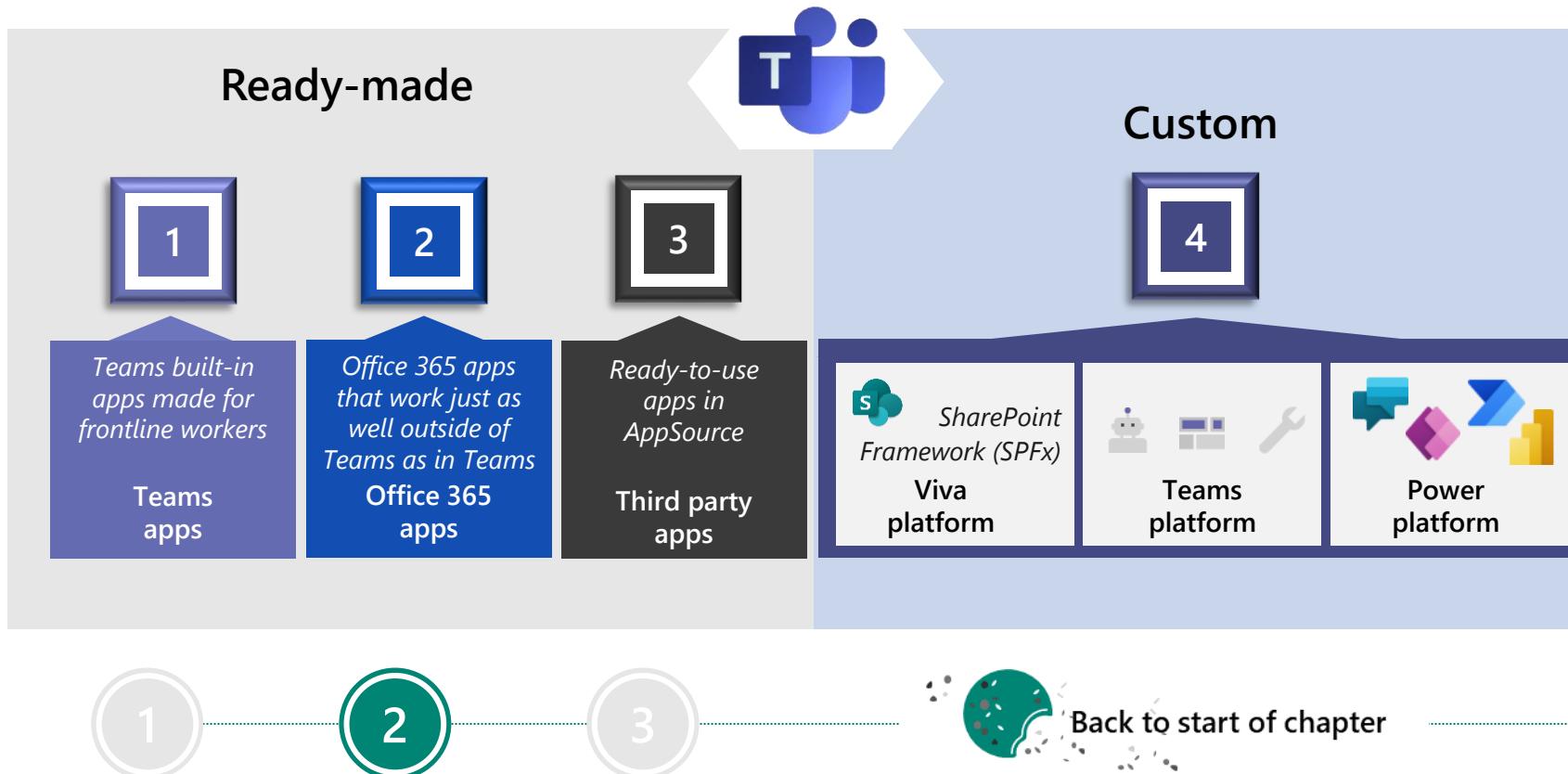
Meet your building blocks

Building
block
apps

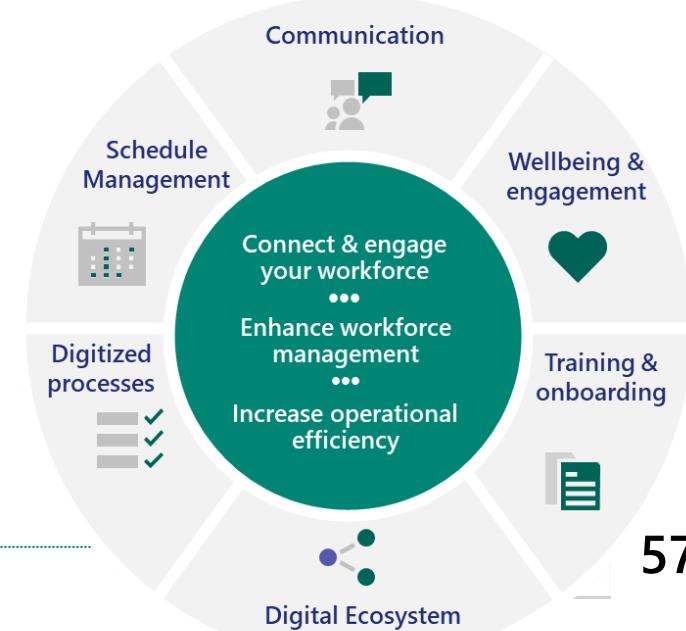


There are many apps that can help your frontline workers, and one way to think about the apps that you can surface in Teams for your Frontline workers as falling into one of four building blocks.

These four blocks can be thought of as *ready-to-use* building blocks thanks to Teams apps (1), Office 365 apps (2) and third-party apps (3) and *custom* building blocks developed thanks to Microsoft 365 extensibility.



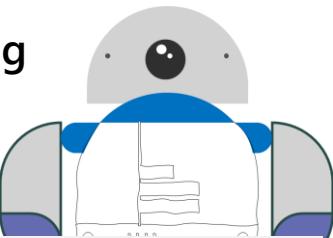
You can use building blocks to light up the 6 key frontline worker experience areas



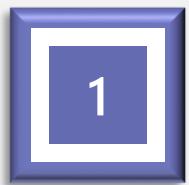


Meet your building blocks: 1 – Teams apps

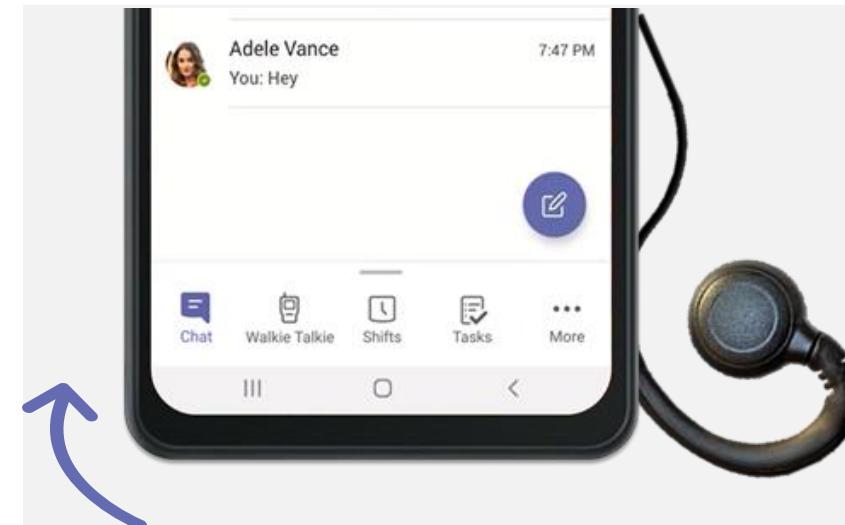
Building
block
apps



Teams apps



Ready-to-use Teams built-in apps made for frontline workers.



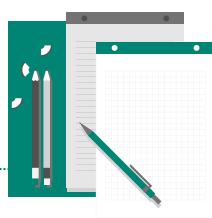
For frontline teams, you'll find ready-to-use tools that address common challenges around scheduling and cover management (the **Shifts** app), instant real-time communication (the **Walkie-Talkie** app), task management (the **Tasks** app).

And there is so much more!



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Meet your building blocks: 2 – *Office 365 apps*

Office 365 apps



Ready-to-use Office 365 apps
that work just as well outside
of Teams as in Teams.

Microsoft 365 suite of apps that can

From **Yammer** that show up as **Communities** in Teams, to branded portal for your frontline workers with targeted news and top actions in **Viva Connection**, and **Forms** for recurring check-in surveys, Microsoft 365 ready-to-use apps help you complete all your scenarios.

These are apps that don't just work great in Teams but are also available on the web or event stand-alone applications and make a great technology choice when you need to cater for scenarios that encompass your frontline employees whom you'd like to be in Teams only and desk-based workers who may be using desktop-based applications and will naturally move from one app to another.

Office 365 Microsoft Business Apps All apps Tips and Tricks

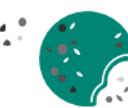
Bookings	Calendar	Customer Voice	Delve
Excel	Forms	Lists	MyAnalytics
OneNote	Outlook	People	Planner
Power Automate	Power BI	PowerPoint	Project
Stream	Sway	Teams	To Do
Whiteboard	Word	Yammer	



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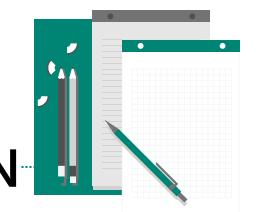
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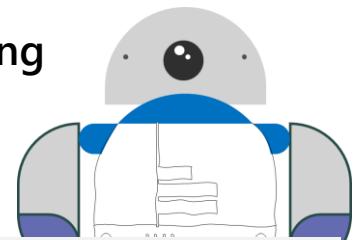
Building
block
apps





Meet your building blocks: 3 – *Third party apps*

Building
block
apps



Third party apps



Ready-to-use apps in
AppSource.

Available in our app store
Choose from over 700
popular apps available to
make your work easier
every day.



The screenshot shows the Microsoft App Source interface. On the left, there's a sidebar with categories like Activity, Chat, Teams, Calendar, File, and Apps (which is selected). Below that are sections for Your organization (Built for Contoso, Top picks, Popular Apps, What's new) and Industries (Analytics and BI, Developer and IT, Education, Human Resources, Productivity). The main area displays a grid of apps. One app, 'Tech Support', is highlighted with a purple icon and a brief description: 'Consectetur adipiscing elit. Mauris sit amet du...'. Other visible apps include 'Expenses', 'Time off', 'Travel', 'Dining', 'Logentries', 'Promoter', and 'Sentry', each with its own icon and a brief description.

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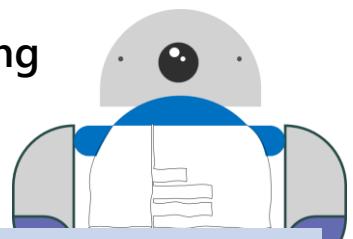
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Meet your building blocks: 4 – *Custom apps*

Building
block
apps



Custom apps

4

Extend Teams apps integrating your existing apps, or build your own apps to run in Teams

Power platform apps

Quickly build custom apps and digital tools for Microsoft Teams, with little or no development experience



Power Apps

Create custom apps to digitize processes and improve efficiency.



Power Automate

Automate repetitive tasks and connect data to improve agility and productivity.



Power Virtual Agents

Build low-code chatbots to provide conversational, AI-driven insights and information.



Power BI

Discuss and visualize data to align teams and confidently make data-driven decisions.

Teams platform apps

With code from scratch or leveraging templated and sample code



Developer tools

Enjoy frictionless app development with our set of Microsoft Teams toolkits.



Extensibility points

Expand the reach of your app with tabs, bots, and messaging extensions.



UI Elements

Create rich experiences with adaptive cards, task modules, and notifications.



APIs

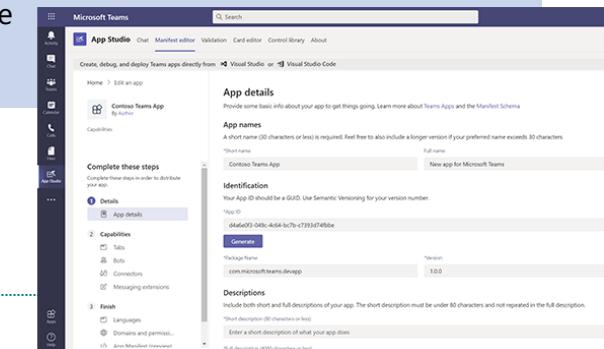
Use the Microsoft Graph to enhance apps inside and outside of Teams.

Viva platform extensibility

Developers can extend Microsoft Viva Connections for building engaging experiences with the widely adopted SharePoint Framework (SPFx).

Viva Connections is your gateway to a modern employee experience where you can build and integrate apps that shape culture and foster connections to help employees thrive.

With SPFx, you have multiple ways to extend – using the same out-of-the-box or custom SPFx web parts, SPFx extensions (e.g. header, footer), and specific components for optimized mobile experiences.



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Here are a few building block app examples

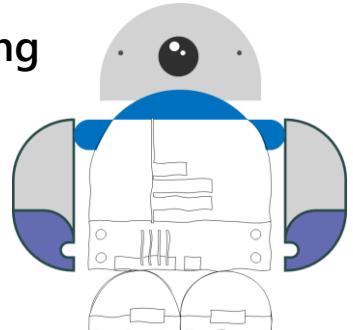
Connect your frontline to communicate	Wellbeing & engagement	Schedule Management	Training & onboarding	Digitized processes	Digital Ecosystem
<p>1</p> <ul style="list-style-type: none"> Messages in Chat Team posts Channels Voice memos Video and audio calls Walkie Talkie app Targeting with Tags 	<p>1</p> <p>Praise Broadcast interactive town hall meetings with Teams live events.</p> <p>2</p> <p>Communities Stream Viva Connections Forms for surveys</p> <p>3</p> <p>Business Apps – Microsoft AppSource</p> <p>4</p> <p>App templates: Celebrations, Co-worker Appreciation, Custom Stickers, Great Ideas, Incentives, Reflect</p>	<p>Shifts The Time Clock app in Shifts</p> <p>Bookings</p>	<p>Teams & Channels dedicated for training and onboarding content</p> <p>SharePoint Online – specifically Microsoft 365 learning pathways</p> <p>Stream Viva Learning (coming soon)</p> <p>App templates: Employee Training, Grow Your Skills, New Employee Onboarding</p>	<p>Tasks core for individual and team productivity</p> <p>Tasks publishing to enable organisational productivity</p> <p>Approvals</p> <p>Bookings Viva Insights</p> <p>App templates: Ask Away, Associate Insights, Checklist, Expert Finder, Incident Reporter, Rapid Assist, Remote Support</p>	<p>App Studio in Teams that can help your development team with creating custom experiences, and Microsoft Graph APIs that enable you to extend experiences and bring in your systems.</p>
<p>2</p> <p>Yammer network as Communities app in Teams</p> <p>3</p> <p>App source > Communication</p> <p>4</p> <p>Company Communicator app template</p>	<p>Business Apps – Microsoft AppSource</p>	<p>Flow connectors for the Shifts app</p> <p>Custom connector and integration with WFM systems</p> <p>Staff Check-ins app template</p>			

empower

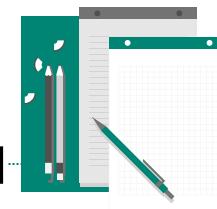
enable

transform

Building block apps



The remaining pages in this Envision section will focus on building block experiences highlighting capabilities that have been proven valuable to frontline.



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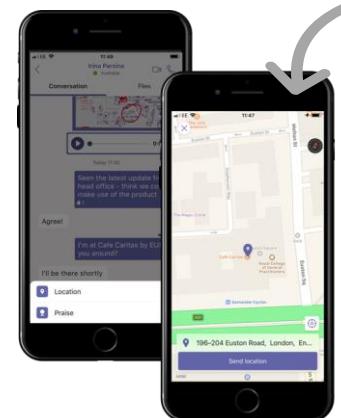


Connect your frontline to communicate with Teams



Communicate with rich functionality of 1:1 and group chat or calling. Record and share audio message and listen on-demand.

Respond with reactions and confirm receipt with Read Receipts.



When matters are urgent, alert your team members with priority notifications

Teams on mobile allows you to quickly share precise location. Smart camera for secure and smart image capture.

Bridging the internal comms gap with announcements and cross-posting

Enable managers to create private channels to chat about confidential topics.

Tag team members based on categories such as role or department and @-mention the tag as needed

With Walkie Talkie, unlock persistent communication in dynamic environments

Organise your team conversations in Teams and Channels. Pin Channels where you are most active in. Display pinned Channels in chat view.

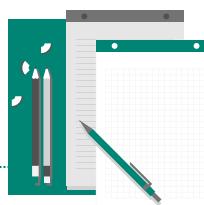
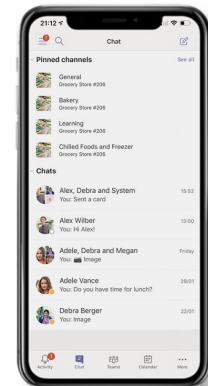
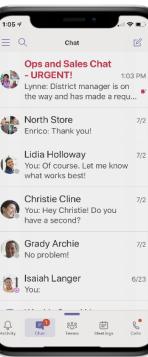
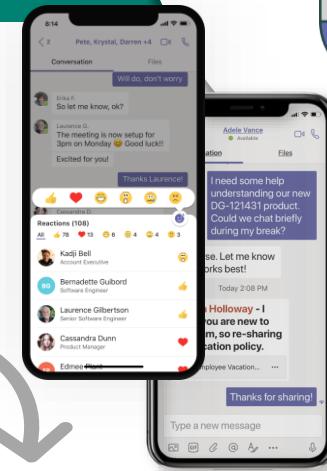
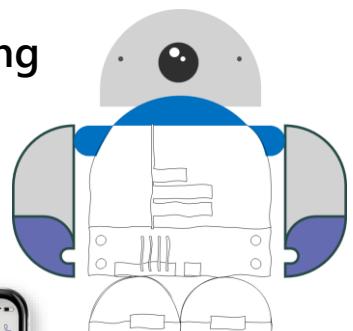
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apps



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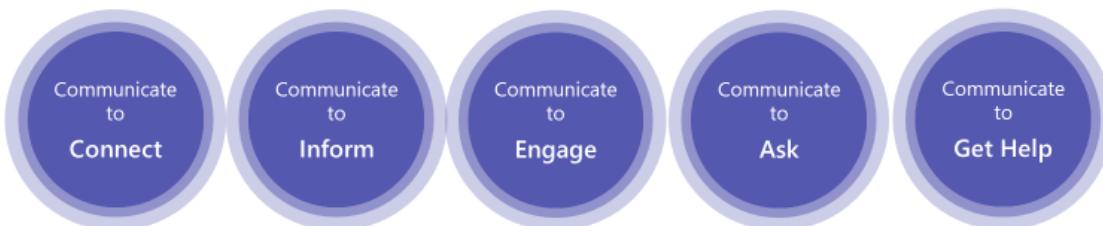


Be careful of the communication need “trap”

communication

[kəmju:nī'keif(ə)n]

NOUN



It's easy to lump all the challenges under the need to improve communication. But often the initial ask of better communication, is a lot more nuanced which is why it's critical to ensure that before we envision how to solve the challenges, we understand what actually needs solving through **Discover** work.

Communication is an exchange of information that's initiated to drive an outcome – for example to instruct, inform, ask or get help.

1. Two-way exchange of information
2. The successful conveying or sharing of ideas and feelings.

Here are just a handful of ways to enable purposeful communication in Teams



Reach the right people faster with **tags** in Microsoft Teams.

Tasks Publishing is super way to “communicate” to the frontline teams when the communication needs an actions that retail operations teams want to follow through.

Tasks with Comments and Notes section for task-oriented comms.

Shifts Day and Shift notes are a brilliant way to share shift related information with an entire scheduled team of frontline workers or a specific individual that's assigned to the shift.

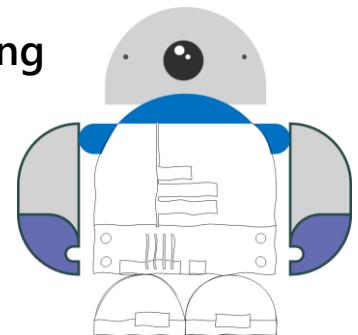
Walkie Talkie of course is great at tackling real-time comms for 1:many scenarios.

Approvals is another form of communication when the comms is specific ask to execute a process.

Voice memos is another method to quickly share a message in Chats or Teams channels.

... and there is also **Calling and Meetings** not to mention **Yammer Communities**.

Building
block
apps



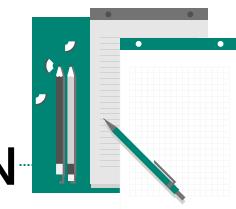
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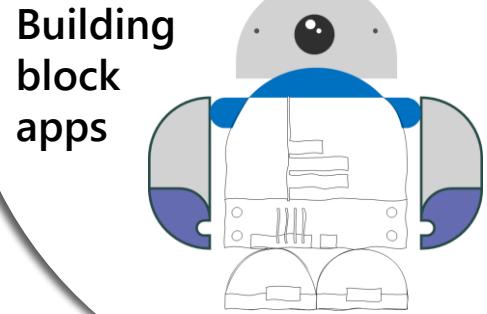
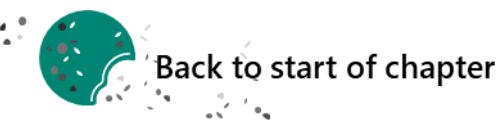
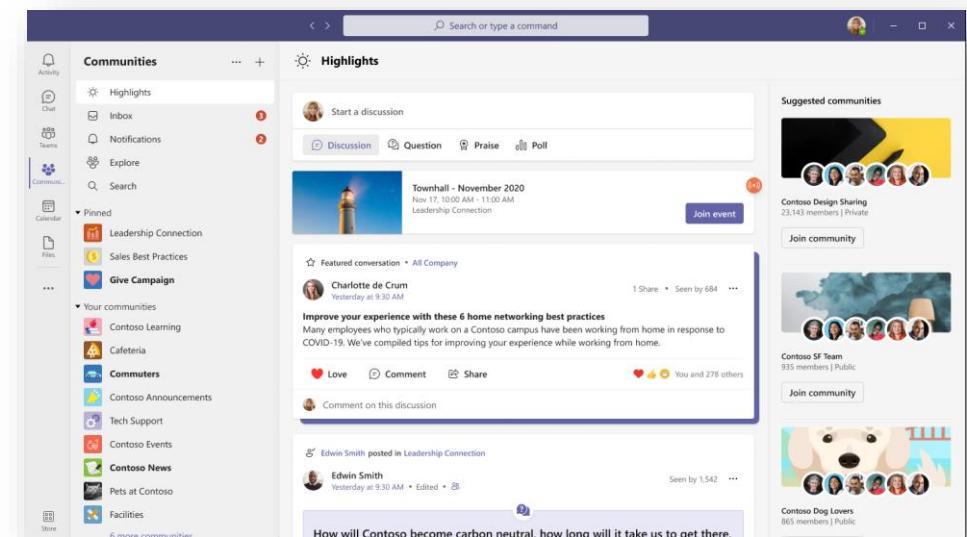


Wellbeing & engagement

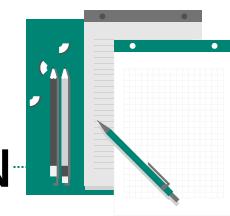
Build deeper connections across your organization

Create an engaged and inclusive workplace.

- Engage across language barriers with in-line translation.
- Celebrate employee success and foster community with pre-set or customizable badges to represent the values of your company.
- Meet your workers where they are and send targeted communication for company-wide policies, goals, and news.
- Produce studio-managed video broadcasts via Stream or low-friction video broadcasts via Teams.



**Building
block
apps**



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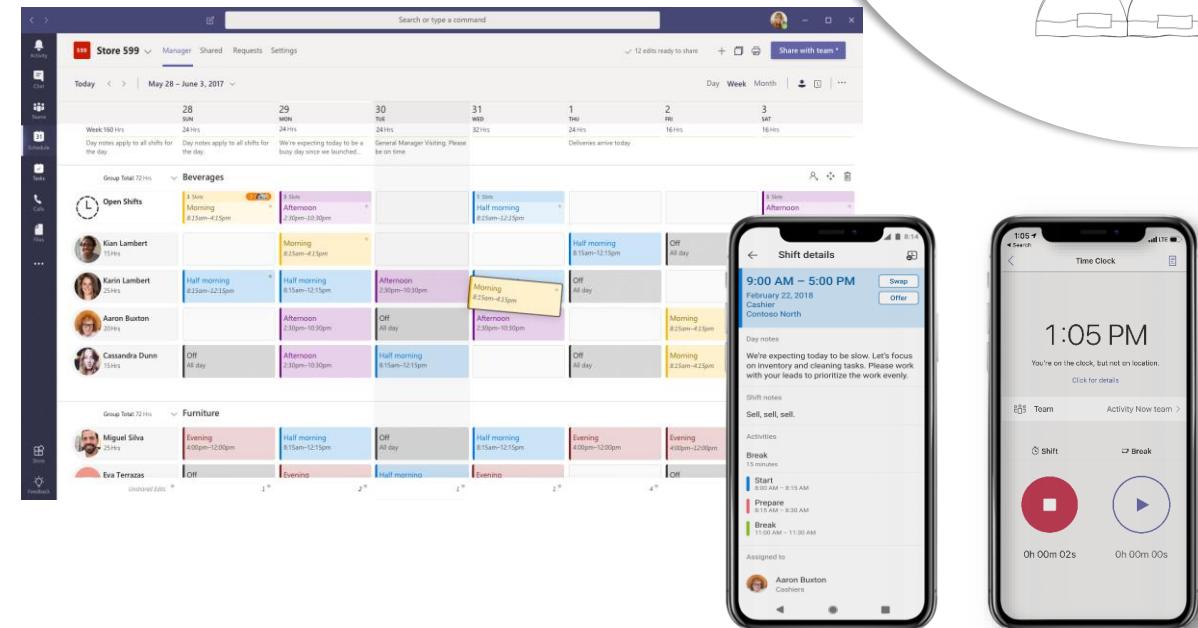


Schedule Management

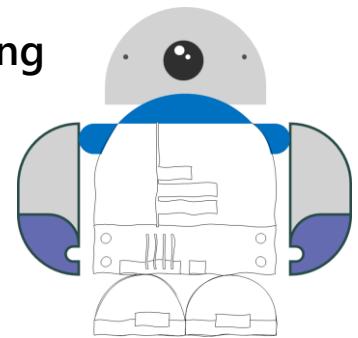
Enhance workforce management

Empower your people to meet fluctuating business needs by equipping workers with agile shift scheduling tools and seamless task management.

- Manage shifts seamlessly with Shifts.
- Track time and attendance with Time Clock in Shifts.
- Customize and extend your frontline platform.



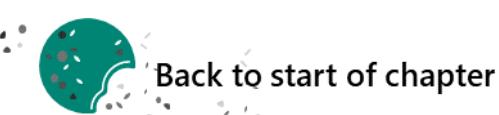
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apps



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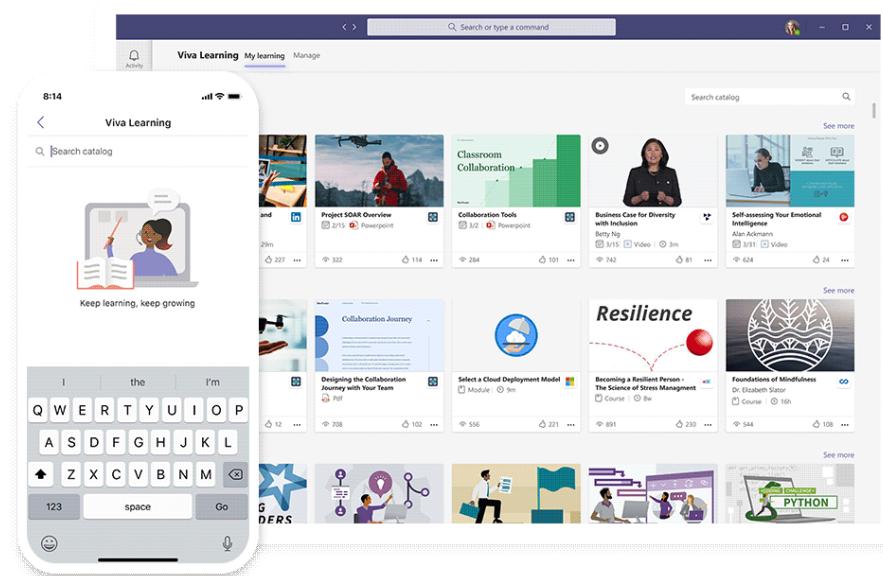


Training & onboarding

Accelerate onboarding and learning

Provide easy access to training content for job-related learning to quickly onboard employees and continuously build their skills.

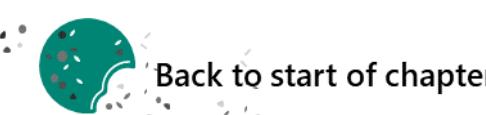
- Provide easy access to training content for job-related learning such as employee handbooks, training guides and more easily available.
- Train and onboard workers with modern learning experiences in Viva Learning.



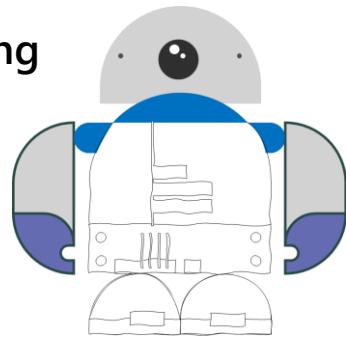
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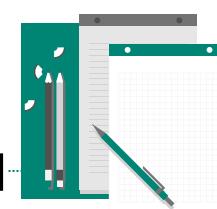
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Building
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apps



Content shared and searchable in Teams



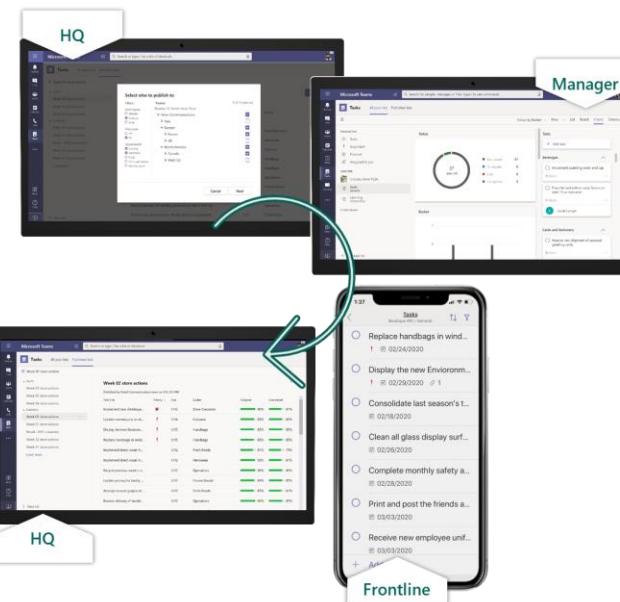


Digitized processes

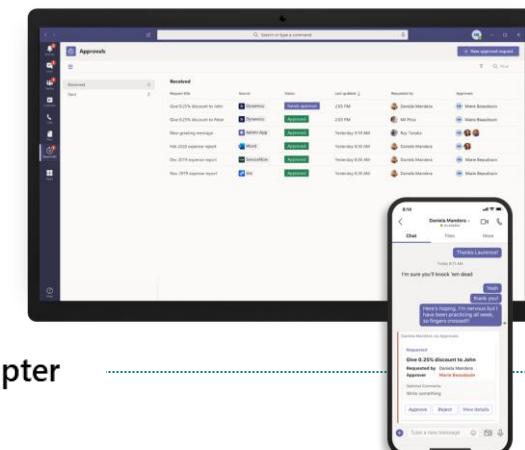
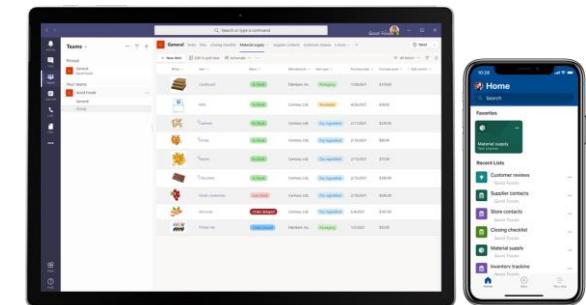
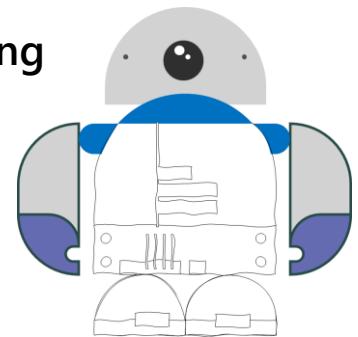
Digitize processes to drive efficiency

Transform frontline processes with purpose-built apps and digital workflows to improve speed, agility and efficiency.

- Reimagine the distribution of tasks from corporate headquarters to frontline workers with Tasks.
- Manage information and track ongoing processes in a simple, collaborative way with Lists.
- Get faster approvals by streamlining your requests. Easily create, manage, and share approvals directly from a chat, a channel conversation, or from the app.
- Create automated workflows between your apps and services to synchronize files, get notifications, collect data, and more using Power Automate.



Building
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apps



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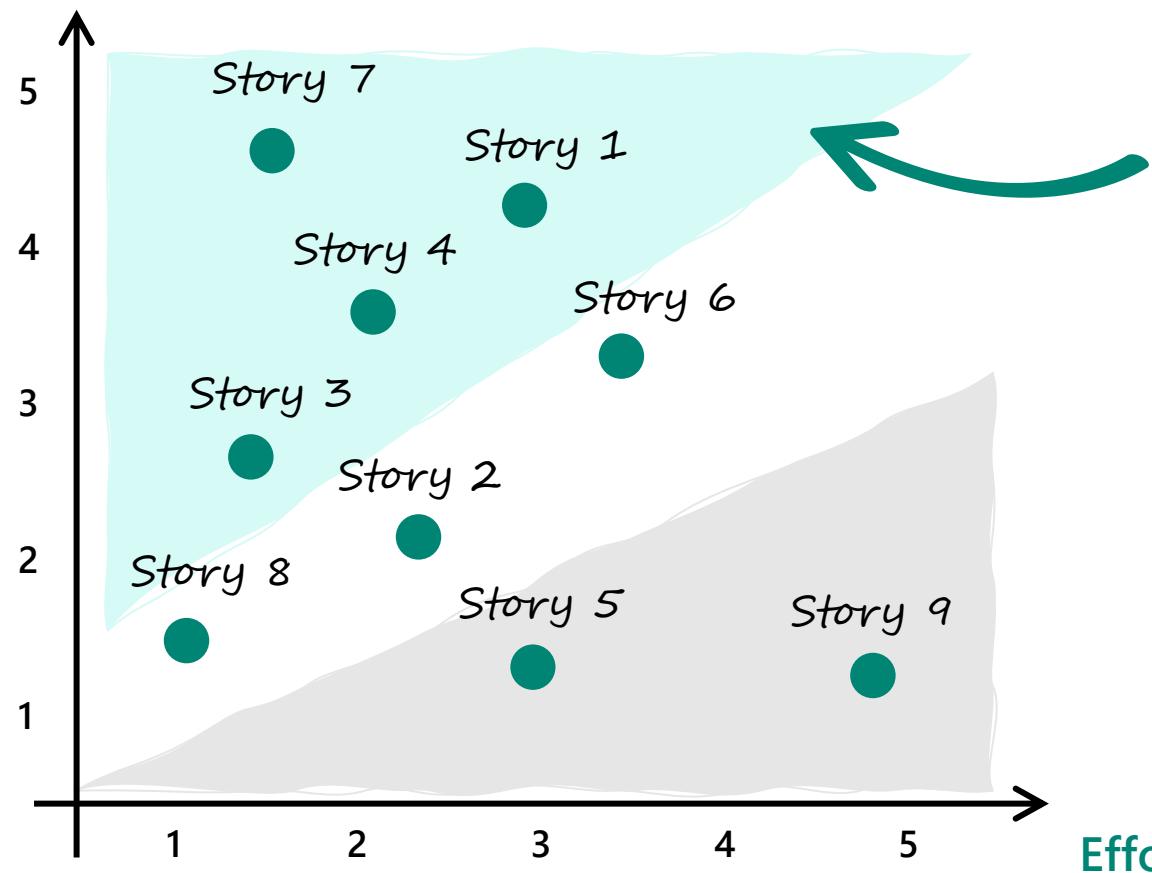
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Choosing your solution building blocks

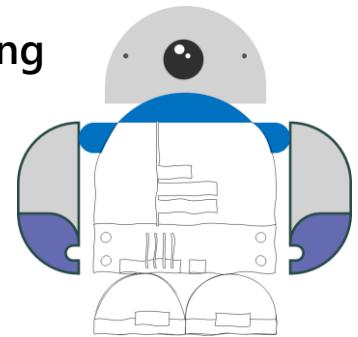
Value



We recommend starting with solutions that offer you the most value (solve the problem you've identified) with least effort.

Starting with ready-made capabilities in teams (your building block 1 and 2 is a natural place to start).

Building
block
apps



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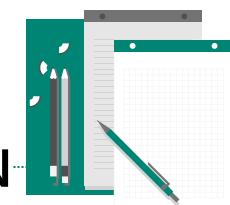
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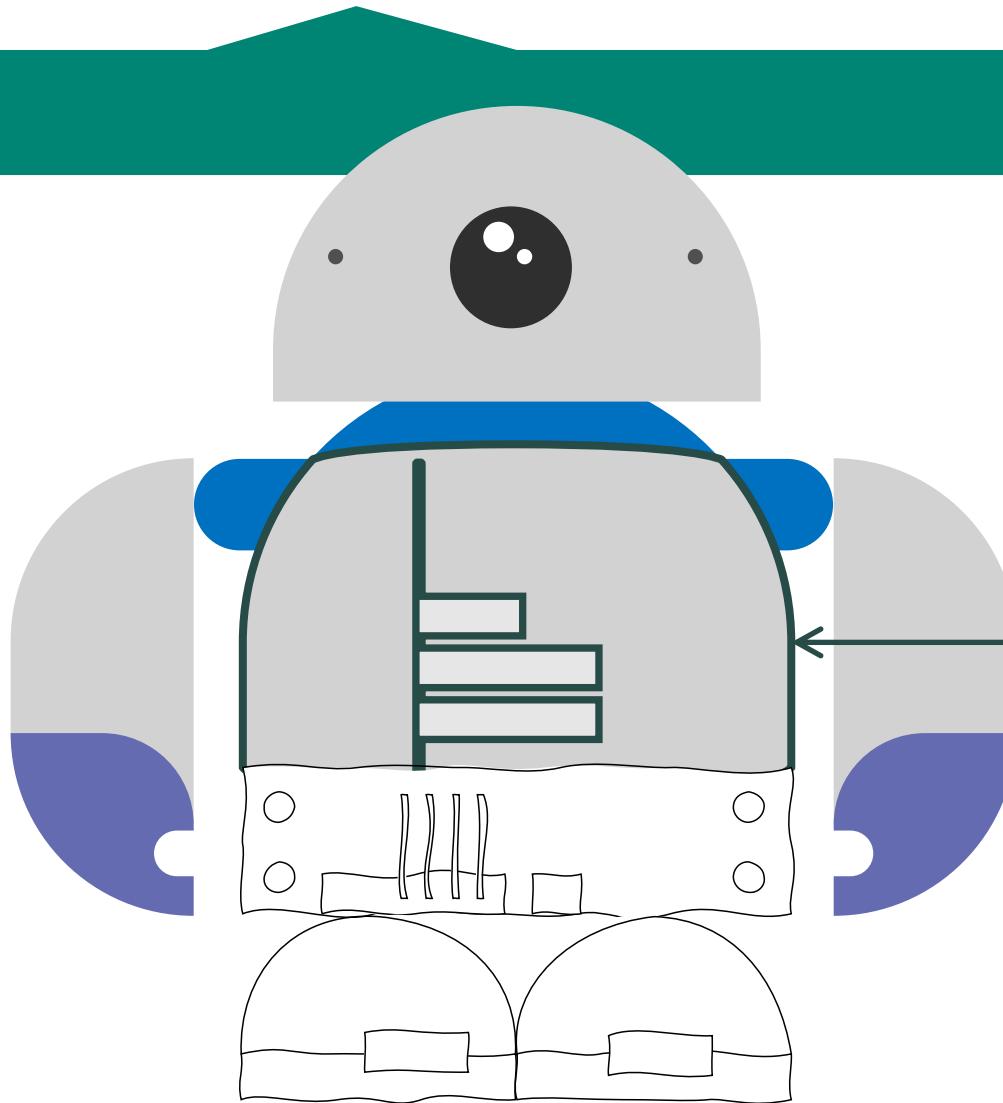
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Teams + channels

CONSIDERATIONS

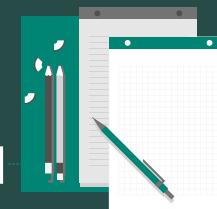
Understanding the Teams and Channels concepts and the role of Tags and Chats

...

Choosing Teams and Channels structure to light up your solution

...

Leveraging Team templates



PLAN



About Teams, Channels and Tags

Teams

- Teams are a collection of people, content, and tools within your organization. Teams can be created to be private to only invited users.
- Teams can also be created to be public and open and anyone within the organization can join (up to 10,000 members).

Channels

- Channels are dedicated sections within a team to keep content and tools organized.
- Channels are places where conversations happen and where the work actually gets done. Channels can be open to all team members or, if you need a more select audience, they can be private. Standard channels are for conversations that everyone in a team can participate in and private channels limit communication to a subset of people in a team.
- Every Team automatically gets a General channel, but from there you can customize your structure.

Chats

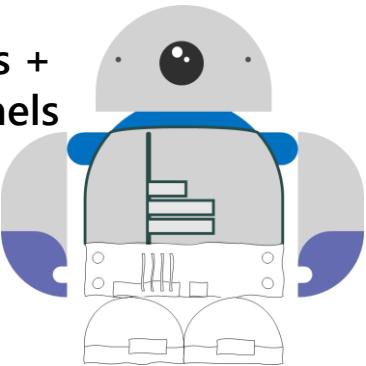
- Chats in Teams enable ad-hoc conversations with between individuals in your organization without having to define a team for them.
- Chats are great for daily interactions but has some limitations when it comes to additional functionality.

Tags

- With tags, you can categorize people based on attributes, such as role, project, skill, training, or location. For example, a "Nurse" or "Manager" or "Designer" tag will enable you to reach groups of people in Teams without having to type every single name.
- Once a tag is added, just @mention it in a channel. Everyone who has been assigned that tag will receive a notification just as they would if they were @mentioned individually.
- Another way to use a tag is to start a new chat and then select the tag that is assigned to the people you want to reach.

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Teams +
Channels



Keep in mind [Limits and specifications for Microsoft Teams](#) - [Microsoft Teams](#) | [Microsoft Docs](#).

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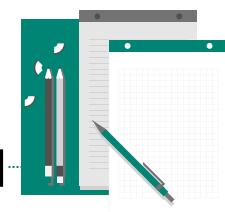
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Choosing Teams and Channels structure to light up your solution

Choosing the right Teams and Channel structure is pivotal. There are a couple of recommendations that you can follow to ensure that you get to an optimal design:

1. Keep the channels you expect frontline workers to navigate to or participate in to a minimum –up to 5. This could be 5 channels in a single team or 5 channels across multiple teams.
2. Complement your Teams and channels strategy with Tags.
3. For smaller organizations, an org-wide team can be used to streamline corporate communication.
4. Naming conventions help – both for Teams and channels.
5. Aim towards an intuitive structure - could Teams represent digital version of the physical space and processes frontline workers are familiar with.

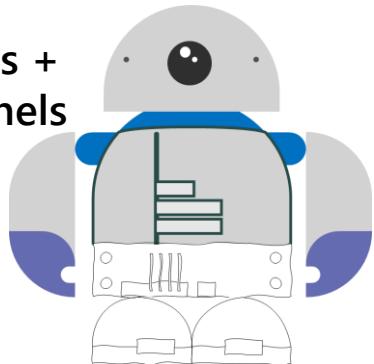


Some of frontline apps in Teams (building block one) rely on Teams (ensuring that the right people are either members or owners of the team) and channels.

For example:

- In Shifts, a schedule is set up per team, so you need to make sure that the people you want to assign shifts to in each schedule are members of that team.
- Tasks can be created per channel and workers you want to be able to assign tasks to need to all belong to the team where the tasks list was created.
- Walkie Talkie app uses channels to enable frontline workers to connect to and talk to each other in real time. Just like you'd think about the right frequency over which to have radio communications, you'd need to consider what channel you'd like to have your frontline workers connect to.

Teams +
Channels



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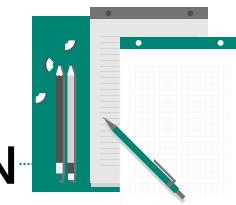
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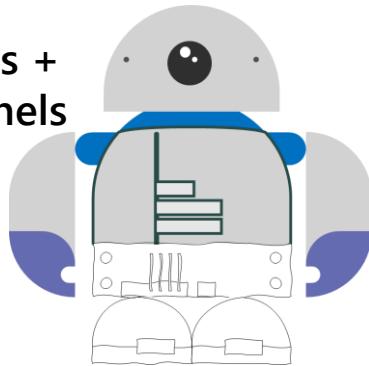
Team templates

Team templates are pre-built definitions of a team's structure designed around a business need or project. You can create your own template in the admin console.

With Microsoft Graph, you use the pre-built templates. You can use team templates to quickly create rich collaboration spaces with channels for different topics and preinstall apps to pull in mission-critical content and services. Team templates provide a predefined team structure that can help you easily create consistent teams across your organization.

It is common to leverage the pilot at **Build** stage to understand what works for the targeted frontline roles and create templates based on feedback and insights you gain so that as you **Grow** your solution across your entire frontline workforce you can ensure consistent experience across your organization.

Teams + Channels



Team properties supported by team templates

Base template type

Team name

Team description

Team visibility (public or private)

Team settings (for example, member, guest, @ mentions)

Autofavorite channel

Installed app

Pinned tabs

Team properties not yet supported by team templates

Team membership

Team picture

Channel settings

Connectors

Files and content

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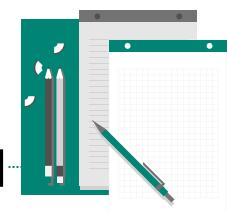
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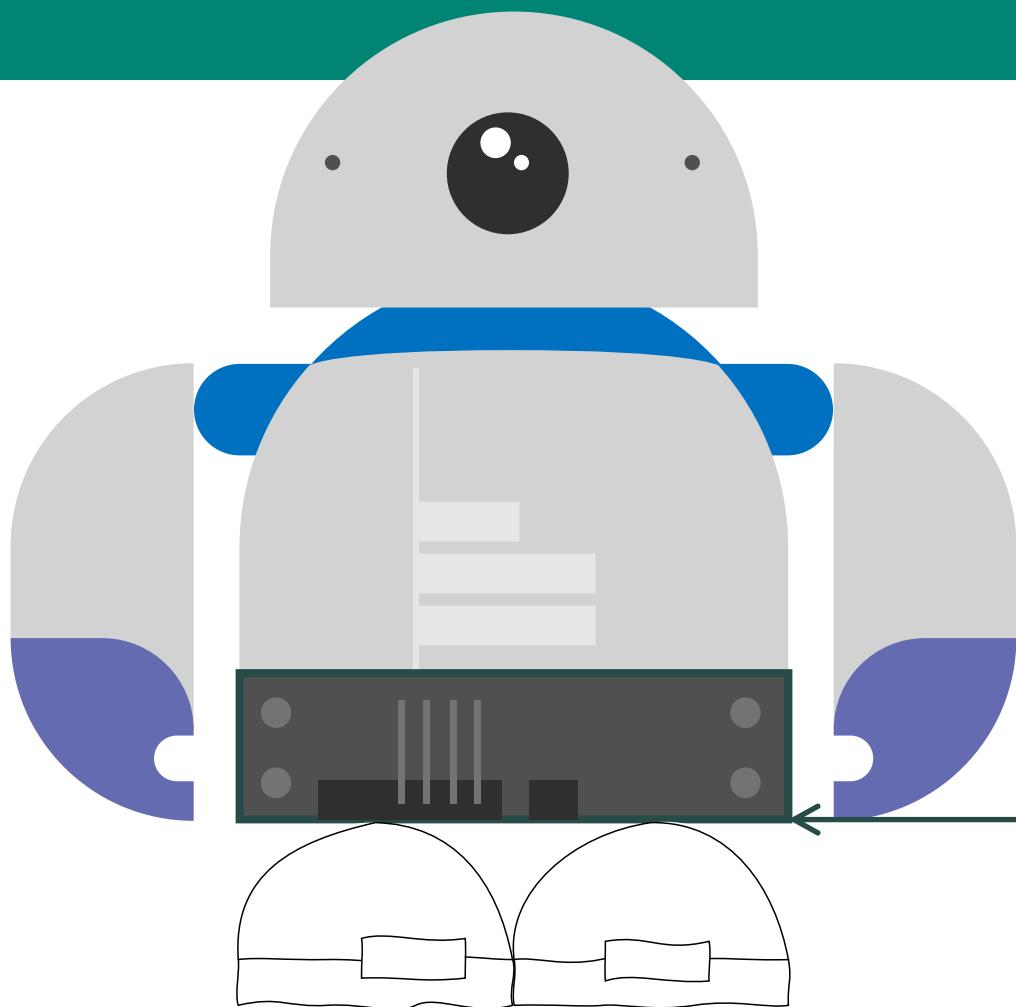


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5

Policies + Permissions

CONSIDERATIONS

Permission and roles

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Tagging

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Team templates

•••

App permission policies

•••

App set up policies

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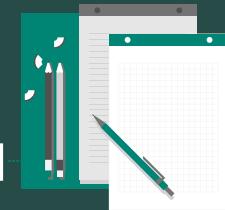
Messaging policies

•••

Policy packages

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Shift-based access



PLAN



Permissions and roles

Every member in Teams has a role, and each one has different permissions. For teams that you create for your frontline workers, you may want reconsider the default permissions.

Owners

Team owners manage certain settings for the team. They add and remove members, add guests, change team settings, and handle administrative tasks. There can be multiple owners in a team. In Shifts, owners can manage the schedule of the entire team.

These are typically frontline leaders or managers.

Members

Members are the people in the team. They talk with other team members in conversations. They can view and usually upload and change files. They also do the usual sorts of collaboration that the team owners have permitted.

These are typically frontline workers.

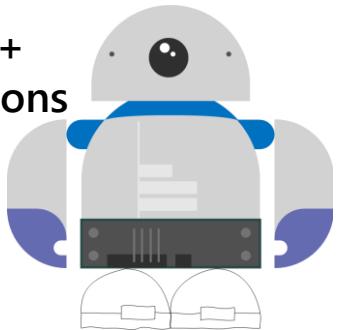
Guests

Guests are people from outside of your organization that a team owner invites, such as partners or consultants to join the team. Guests have fewer capabilities than team members or team owners, but there's still a lot they can do.

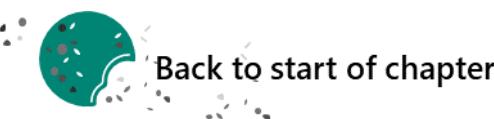
As an admin, you can use teams policies in Microsoft Teams to control what users in your organization can do in teams and channels. For example, you can set whether users are allowed to create private channels.



Policies + Permissions



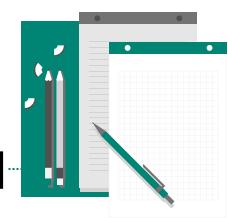
	Team Owner	Team Member
Create team	Yes	No
Leave team	Yes	Yes
Edit team name/description	Yes	No
Delete team	Yes	No
Add standard channel	Yes	Yes
Edit standard channel name/description	Yes	Yes
Delete standard channel	Yes	Yes
*Add private channel	Yes	Yes
*Edit private channel name/description	No	N/A
*Delete private channel	Yes	No
Add members	Yes	No
Request to add members	N/A	Yes
Add apps	Yes	Yes



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Team settings

Team picture

Add a team picture

Add a team picture

Member permissions

Enable channel creation, adding apps, and more

Allow members to create and update channels

Allow members to create private channels

Allow members to delete and restore channels

Allow members to add and remove apps

Allow members to upload custom apps

Allow members to create, update, and remove tabs

Allow members to create, update, and remove connectors

Give members the option to delete their messages

Give members the option to edit their messages

Guest permissions

Enable channel creation

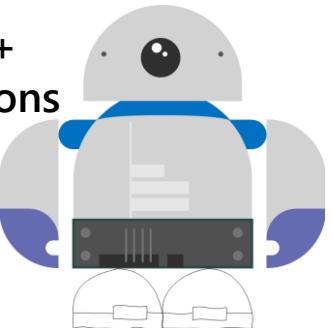
Allow guests to create and update channels

Allow guests to delete channels

Team expiration

See when your team will be expiring or up for renewal

Policies + Permissions



@mentions

Choose who can use @team and @channel mentions

Show members the option to @team or @[team name] (this will send a notification to everyone on the team)

Give members the option to @channel or @[channel name]. This will notify everyone who's shown the mentioned channel in their channel lists.

Team code

Share this code so people can join the team directly - you won't get join requests

Generate code

Fun stuff

Allow emoji, memes, GIFs, or stickers

Giphy Enable Giphy for this team and filter out inappropriate content

Stickers and memes Enable stickers and memes

Custom Memes Allow memes to be uploaded

Tags

Choose who can manage tags

Tags are managed by

Automatically apply tags from other apps (Shifts)

Team expiration

See when your team will be expiring or up for renewal

Here is a comprehensive list of Teams settings



1

2

3



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PLAN

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Tagging

Tags let you quickly reach a group of people all at once.

With tags, you can categorize people based on attributes, such as role, project, skill, training, or location.

You can create and assign custom tags to categorize people based on attributes, such as role, project, skill, or location. For example, a "Nurse" or "Manager" or "Safety Expert" tag will enable you to reach groups of people in Teams without having to type every single name.

Or, tags can be automatically assigned to people based on their schedule and shift information in the Shifts app. After a tag is added to one or multiple team members, it can be used in @mentions by anyone on the team in a channel post or to start a conversation with only those people who are assigned that tag. Tagging by shift can also be backed by major workforce management systems like JDA, Kronos, and AMiON by integrating them with Shifts in Teams.

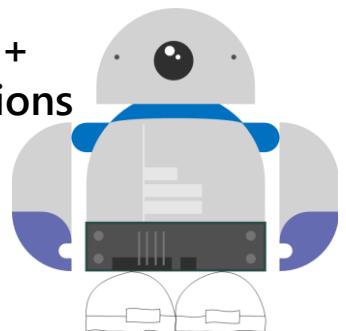
Admins can control how tags are used across your organization in the Microsoft Teams admin center.

A team can have up to 100 tags, up to 100 team members can be assigned to a tag, and up to 25 tags can be assigned to a single user.



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Policies + Permissions



Tagging

Tags can be added to one or more team members and used to communicate with tagged members using @mentions in a channel post or starting a chat conversation. [Learn more](#)

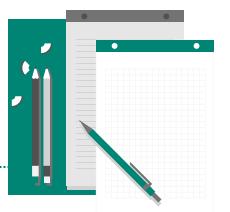
Tags are managed by [?](#) Team owners and members

Let team owners override who can manage tags [?](#) On

Suggested tags [?](#)

contoso × design × engineering ×

Let custom tags be created [?](#) Off



PLAN

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Team Templates and Templates policies

Teams template policies let you create and set up policies for people in your organization so they can see only certain templates.

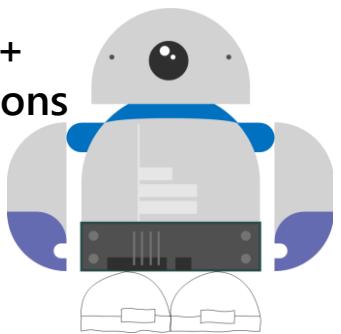
For example, you may choose to create certain templates to be visible for specific frontline divisions.

You can use the Global (Org-wide default) policy and customize it or create one or more custom policies for those people that will be using templates.

The screenshot shows the Microsoft Teams admin center interface. On the left, there's a sidebar with various administrative options like Dashboard, Teams, Manage teams, Team templates, Devices, Locations, Users, Contacts, Meetings, Teams apps, Voice, Analytics & reports, Org-wide settings, Planning, Notifications & alerts, Storybook, Legacy portal, and Call quality dashboard. The 'Team templates' option is highlighted with a red box. The main content area is titled 'Team templates' and contains a brief description: 'Team templates are pre-built definitions of a team's structure designed around a business need or project. You can create a template using the Teams client, then upload and manage the templates stored in your organization. These templates can be assigned to a specific group using team policies.' Below this, there's a table with columns for Name and Description. A red box highlights the '+ Add' button at the top of the table. The table lists several templates:

Name	Description
Organize a Store	Bring your retail employees together in one central experience to manage tasks, share documents and resolve customer issues.
Collaborate within a Bank Branch	Centralize collaboration for your bank branch employees across Huddles, Customer Meetings, Business Processes such as Onboarding, and more.
Collaborate on a Global Crisis or Event	Centralize collaboration for your crisis team across business units and help create business continuity plans, share remote access, and more.
Coordinate Incident Response	Centralize communication and critical resources for your crisis management or incident response team. Within this team, you can manage tasks, share documents, and collaborate on everything you need to deliver a compelling event.
Quality and Safety	Centralize communication, access to resources, and plant operations with a Manufacturing Plant team. Include policy areas like Quality, Safety, and Compliance.
Organize Help Desk	Collaborate on documentation, policy and processes that support your helpdesk. Integrate your existing ticketing system with Microsoft Teams.
Adopt Office 365	Help build, grow, and sustain your Champions community rollout by evangelizing and helping your peers with the new features and benefits of Office 365.
Onboard Employees	Improve your culture and streamline your employee onboarding with this central team for resources, questions and a knowledge base.
Manage an Event	Manage tasks, documents and collaborate on everything you need to deliver a compelling event. Invite guests users to join the conversation and share documents.
Manage a Project	Manage tasks, share documents, conduct project meetings and document risks and decisions with this template for general projects.
Hospital	Streamline communication and collaboration between multiple wards, nodes and departments within a hospital. This template includes a central hub for patient care, staff communication, and operational efficiency.

Policies + Permissions





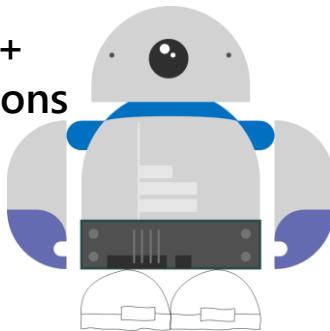
App permission policies

As an admin, you can use app permission policies to control what apps are available to Microsoft Teams frontline workers in your organization.

You can allow or block all apps or specific apps published by Microsoft, third-parties, and your organization.

When you block an app, frontline workers who have the policy are unable to install it from the Teams app store.

Policies + Permissions



Add app permission policy

Description

Microsoft apps
Choose which Teams apps published by Microsoft or its partners can be installed by your users.

Allow all apps

Third-party apps
Choose which Teams apps published by a third-party that can be installed by your users.

Allow all apps

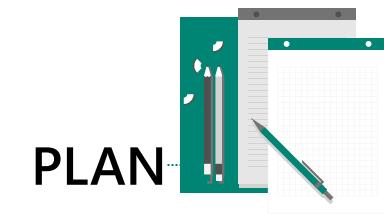
Custom apps
Choose which custom apps can be installed by your users.

Allow all apps

Save Cancel



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PLAN

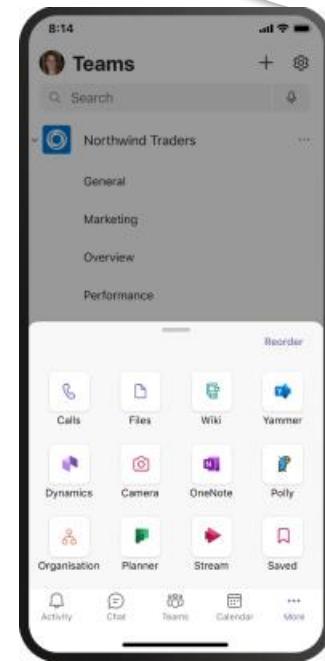
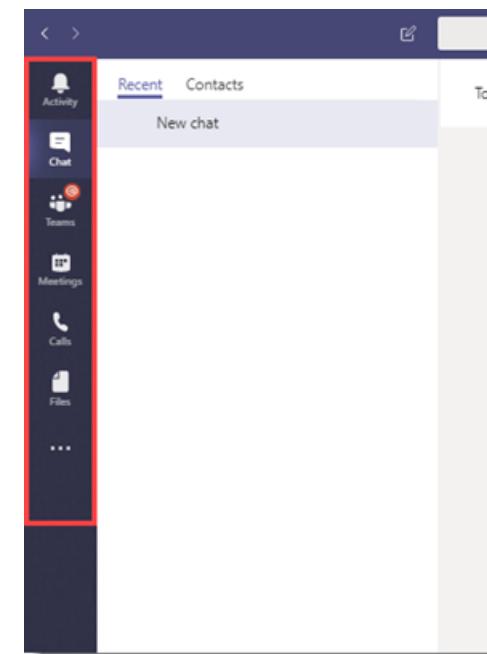
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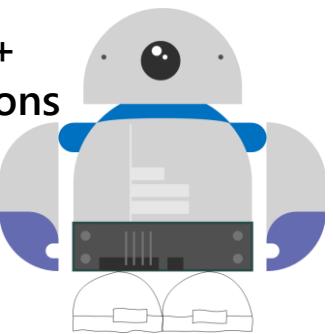
App set-up policies

As an admin, you can use app setup policies to install and pin apps to promote the most used apps in your organization, and to decide if you want frontline workers to upload custom apps to Teams.

- Pin apps: app setup policies let you choose apps to pin, set the order they show up in for your frontline workers, and control whether or not frontline workers can pin their own apps to the Teams app bar.
- Install apps: app setup policies let you install apps on behalf of frontline workers when they start Teams and during meetings.
- Upload custom apps: app setup policies let you allow frontline workers to upload custom apps to Teams.



Policies +
Permissions



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Messaging policies

Messaging policies are used to control which chat and channel messaging features are available to frontline workers in Microsoft Teams. Admins can use the global (Org-wide default) policy that's created automatically or create and assign custom messaging policies.

Frontline workers in your organization will automatically get the global policy, unless you create and assign a custom policy.

You may want to understand and customize messaging policies for a tailored frontline messaging experiences.

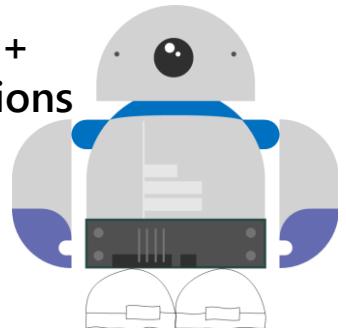
1. Choose to display pinned channels above recent chats. Enable this setting to move pinned channels to the top of the mobile device screen so that a frontline worker doesn't need to scroll to find them.
2. Send urgent messages using priority notifications. If you turn this on, frontline workers can 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.
3. 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 uncertainty about whether a message was read and improve team communication.
4. Ability to create audio messages



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Policies +
Permissions





Policy packages

A policy package in Microsoft Teams is a collection of predefined policies and policy settings that you can assign to users who have similar roles in your organization.

We built policy packages to simplify, streamline, and help provide consistency when managing policies for groups of users across your organization.

You can use the [policy packages included in Teams](#) or [create your own custom policy packages](#).

Teams currently includes the following frontline policy packages:

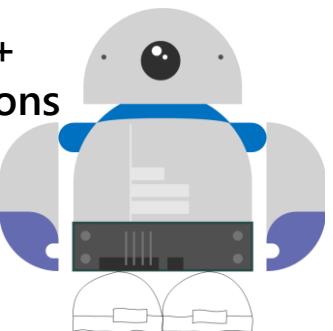
Frontline manager Creates a set of policies and applies those settings to Frontline managers in your organization.

Frontline worker Creates a set of policies and applies those settings to Frontline workers in your organization.

The screenshot shows the Microsoft Teams admin center interface. On the left is a dark sidebar with various navigation options: Dashboard, Teams, Devices, Locations, Users, Contacts, Meetings, Messaging policies, Teams apps, Voice, Policy packages (which is highlighted in purple), Analytics & reports, Org-wide settings, Planning, Notifications & alerts, Storybook, and Legacy portal. To the right of the sidebar is a light-colored main area titled "Policy packages". At the top of this area are buttons for Add, Edit, Duplicate, Delete, and Manage users. Below these buttons is a table listing ten different policy packages, each with a Name column, a Description column, and a brief description of its purpose. The policy packages listed are: Education (Higher education student) (default), Education (Primary school student using remote learning) (default), Education (Primary school teacher using remote learning) (default), Education (Primary school student) (default), Education (Secondary school student) (default), Education (Teacher) (default), Firstline manager (default), Firstline worker (default), and Healthcare clinical worker (default).

Name	Description
Education (Higher education student) (default)	This policy package is designed to create a set of policies and apply those settings to higher education students.
Education (Primary school student using remote learning) (default)	This policy package is designed to create a set of policies that apply to primary students to maximize their learning experience.
Education (Primary school teacher using remote learning) (default)	This policy package is designed to create a set of policies that apply to primary teachers to maximize their teaching experience.
Education (Primary school student) (default)	This policy package is designed to create a set of policies and apply those settings to primary school students.
Education (Secondary school student) (default)	This policy package is designed to create a set of policies and apply those settings to secondary school students.
Education (Teacher) (default)	This policy package is designed to create a set of policies and apply those settings to teachers in education.
Firstline manager (default)	This policy package is designed to create a set of policies and apply those settings to managers of firstline workers.
Firstline worker (default)	This policy package is designed to create a set of policies and apply those settings to firstline workers.
Healthcare clinical worker (default)	This policy package is designed to create a set of policies and apply those settings to clinical workers.

Policies + Permissions





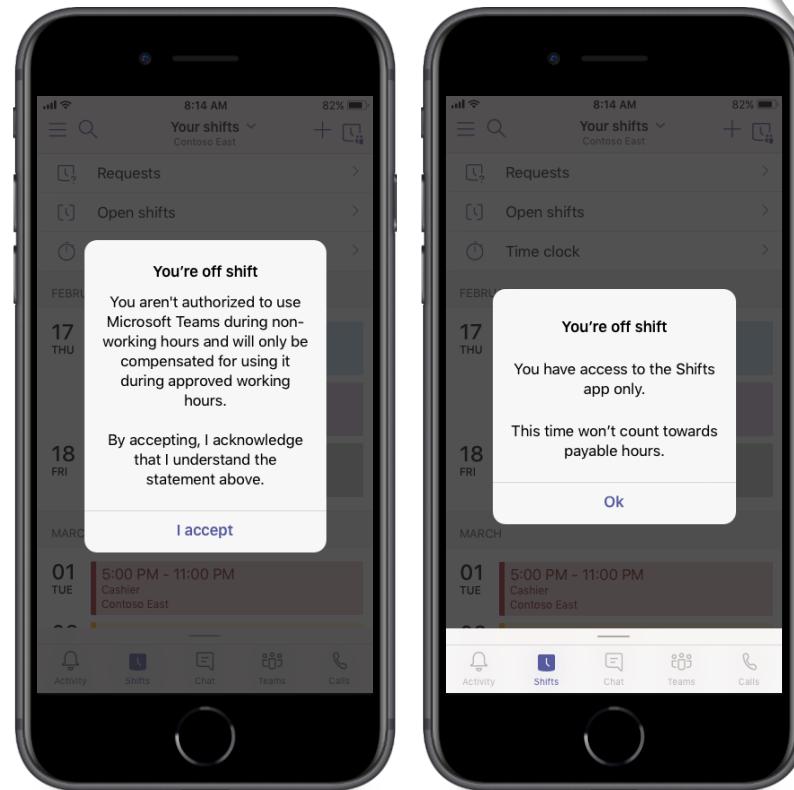
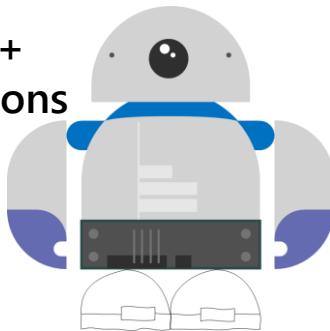
Shift-based access

Here's an example of how your organization can manage shift-based access.

You have frontline workers in your organization that should only be paid for hours they work on a shift that their manager scheduled and approved. They shouldn't be paid for time spent working outside a scheduled shift, which includes using the Teams app. You set up a custom message that says "Your time on Teams when on off shift won't count toward payable hours", which is displayed when frontline workers try to access Teams when off shift. If they choose to use Teams, they click I accept with the understanding that they won't be paid for this time.

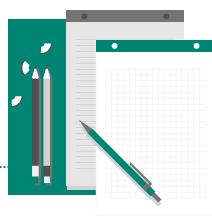
You also have information workers in your organization who are salaried and who don't work shifts. You configure your information workers to use the default presence states in Teams while giving your frontline workers shift-based presence.

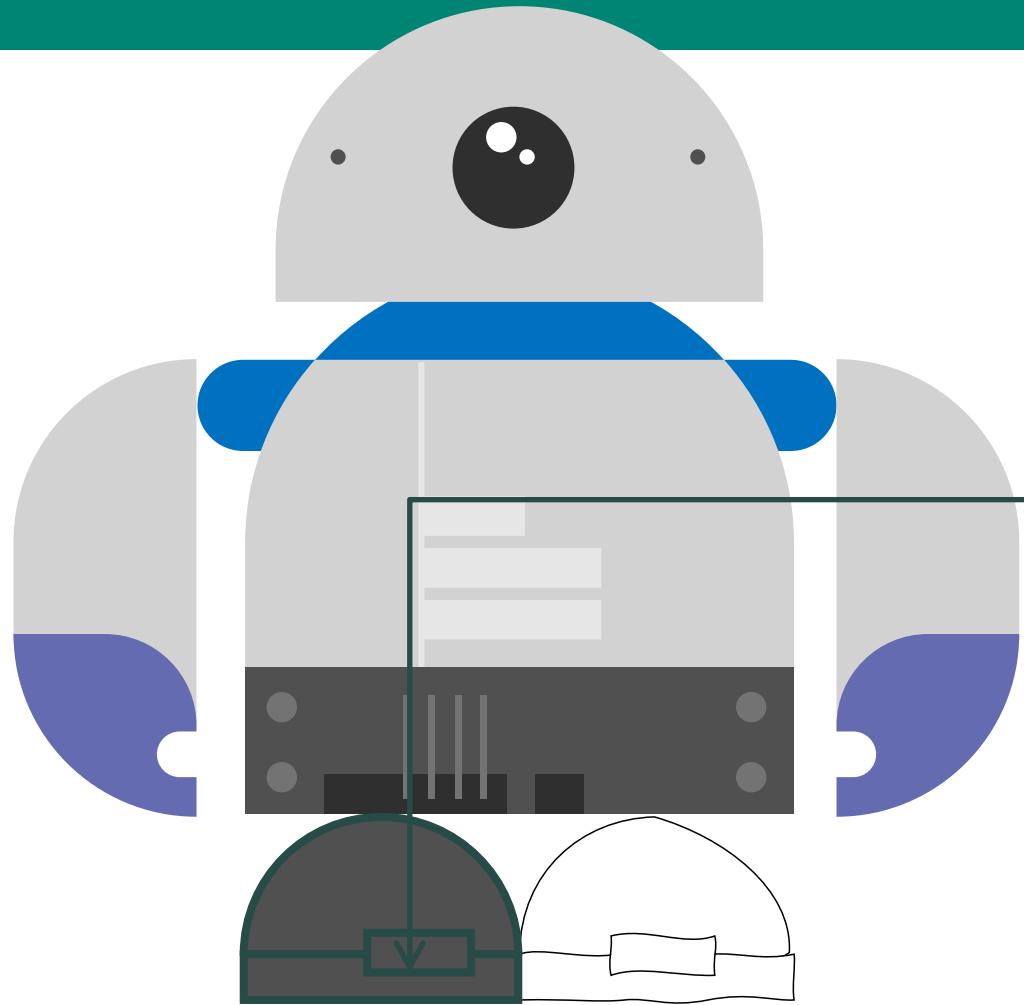
Policies + Permissions



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6

Teams client

CONSIDERATIONS

How will your frontline workers get to the Teams app on their devices?

PLAN





Get clients for Microsoft Teams

Microsoft Teams has clients available for desktop (Windows, Mac, and Linux), web, and mobile (Android and iOS). These clients all require an active internet connection and do not support an offline mode.

For mobile apps, go to the relevant mobile stores Google Play and the Apple App Store.

Supported mobile platforms for Microsoft Teams mobile apps are the following:

- **Android:** Support is limited to the last four major versions of Android. When a new major version of Android is released, the new version and the previous three versions are officially supported.
- **iOS:** Support is limited to the two most recent major versions of iOS. When a new major version of iOS is released, the new version of iOS and the previous version are officially supported.

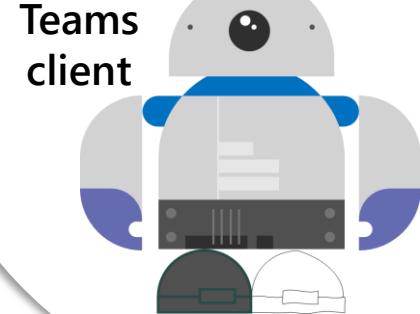
Mobile apps are distributed and updated through the respective mobile platform's app store only. Distribution of the mobile apps via MDM or side-loading is not supported by Microsoft. Once the mobile app has been installed on a supported mobile platform, the Teams Mobile App itself will be supported provided the version is within three months of the current release.

When envisioning your solution you should consider the following:

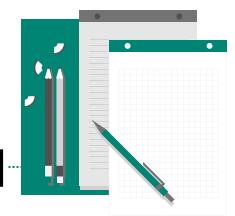
- Are there any restrictions preventing users from installing the appropriate Microsoft Teams client on their devices?
- If your organization restricts software installation, make sure that process is compatible with Microsoft Teams. Note: Admin rights are not required for PC client installation but are required for installation on a Mac.



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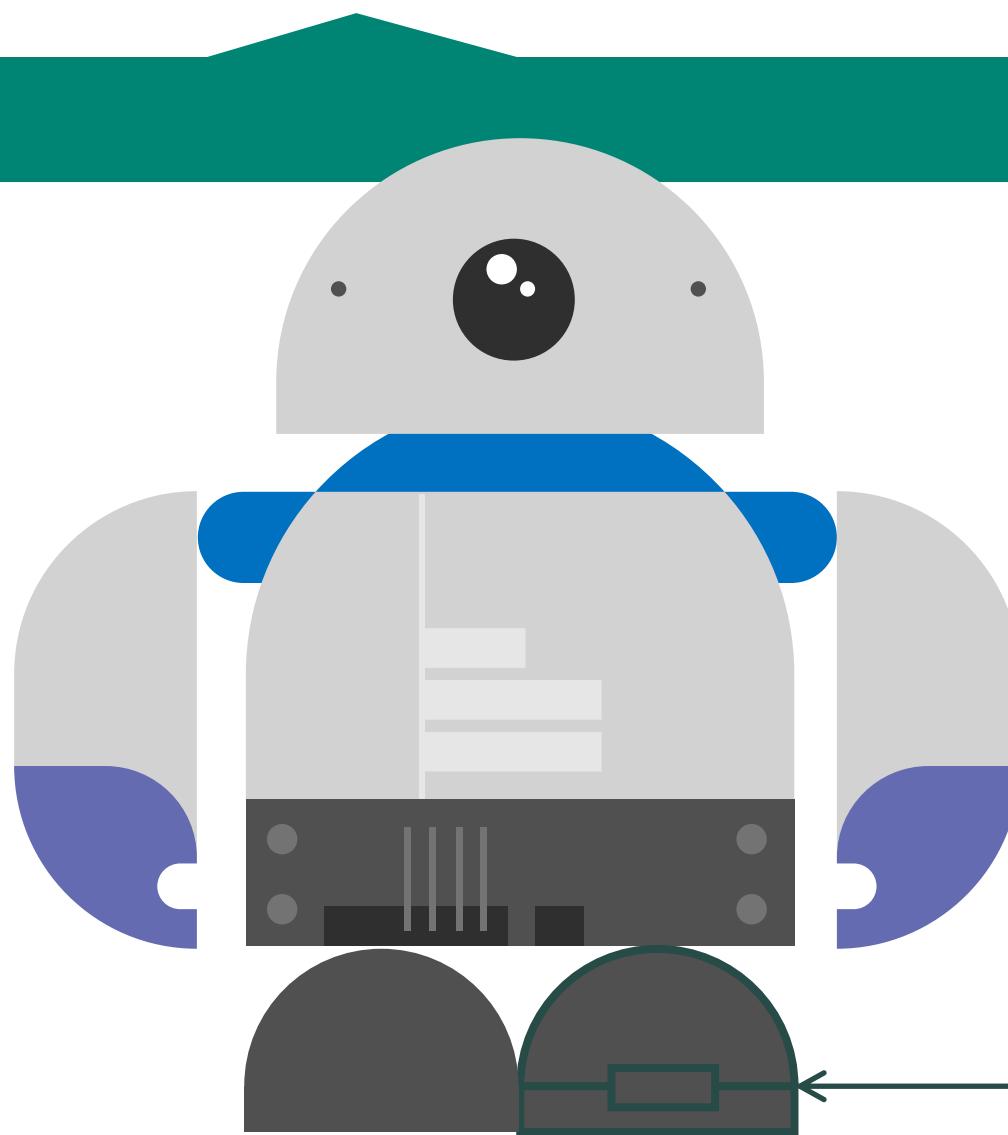


Teams
client



PLAN

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7

Device

CONSIDERATIONS

Accessories to support your solution

...

Managing devices for frontline workers

...

Azure Virtual Desktop



PLAN



Accessories and device needs



When envisioning your solution, you should consider any hardware pre-requisites as well as accessories that may need to be provisioned to optimize the experience for frontline.

Equip your frontline with purpose-built devices. You can choose from an array of industry-specific form factors including rugged devices, headsets, wearables and tablets.

1

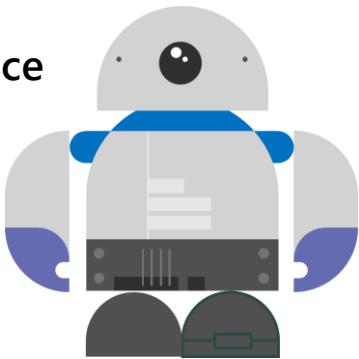
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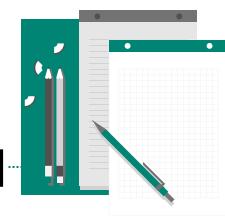


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Device



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Key takeaways

2.1

Starting your journey to success starts with ensuring that you have the right team in place to support the effort and a general direction of travel.

2.2

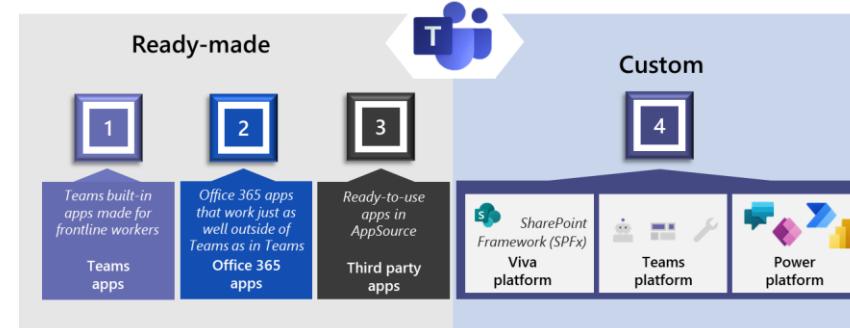
It's difficult to encourage anyone to embrace something new – to ensure our solution succeeds through adoption by your frontline workers, you need to make sure it solves a real problem of your frontline workers. You do this through discovery work that helps you answer the question of "what's needed by whom and why"

2.3

Teams can deliver the exact experience your frontline workers need – consolidating the tools your frontline workers use in a single pane of glass via access to hundreds of premier partner integrations and the ability to easily create custom no/low-code apps to address evolving business challenges.

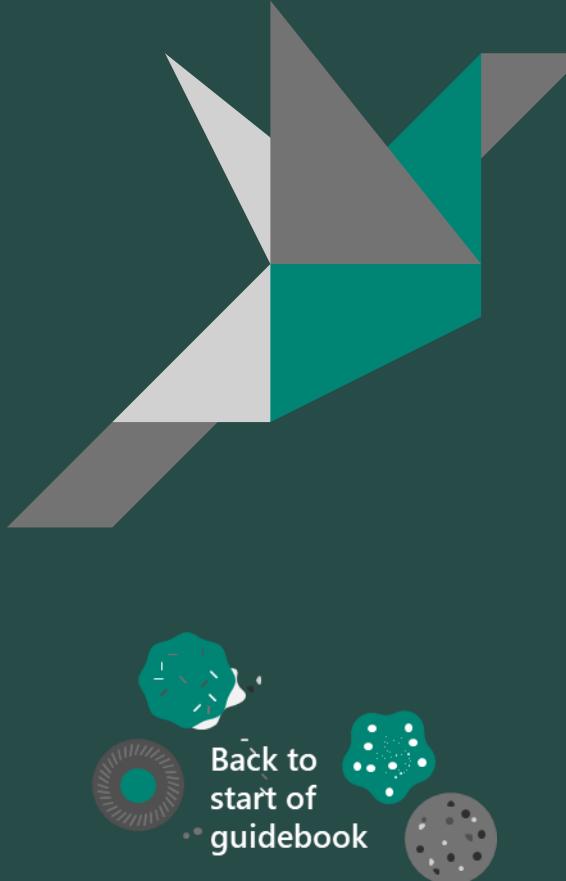


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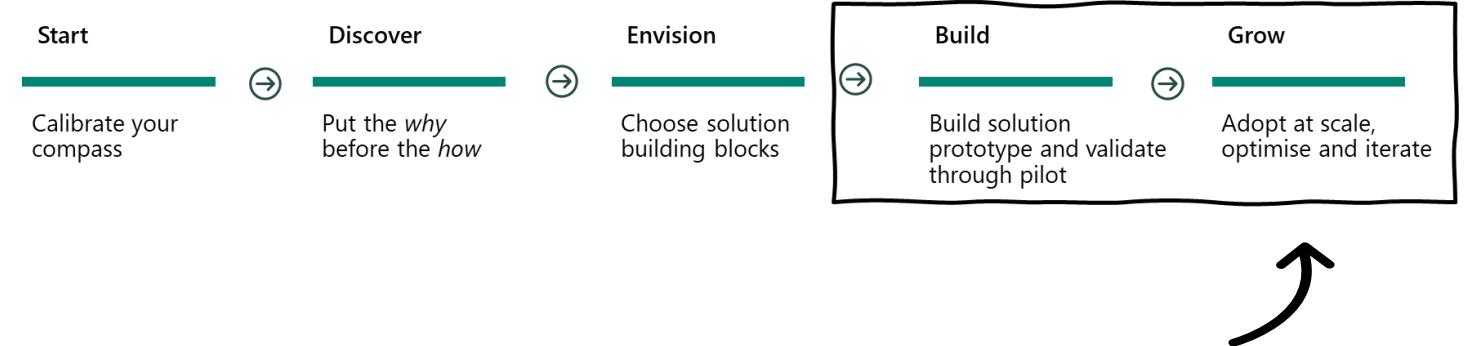
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What to expect from this chapter



Objective

- 1 Build solution prototype.
- 2 Executing an effective pilot.
- 3 Adopt at scale, optimise and iterate.
Best practices and final thoughts.



This Chapter is dedicated to these stages in the journey

3.1

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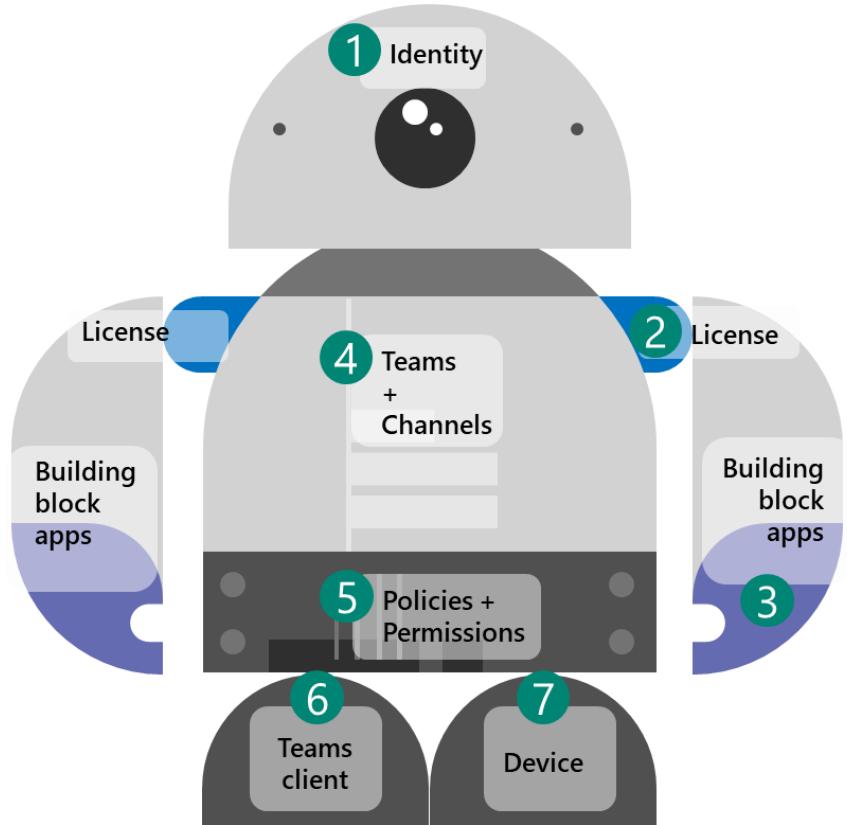
Build solution prototype.





In Chapter 2, you'll find similar sections to this Chapter, but they will contain more of guiding principles when it comes to making key decisions that you can implement with instructions in this Chapter.

Building your solution



Having envisioned your solution in the previous section, you can now build the solution addressing:

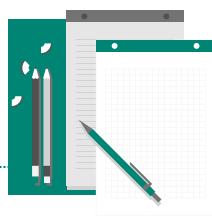
- 1 Identity
- 2 License
- 3 Building block apps
- 4 Teams + Channels
- 5 Policies + Permissions
- 6 Teams client
- 7 Device

This section will share the relevant articles and resources to help you implement the solution.

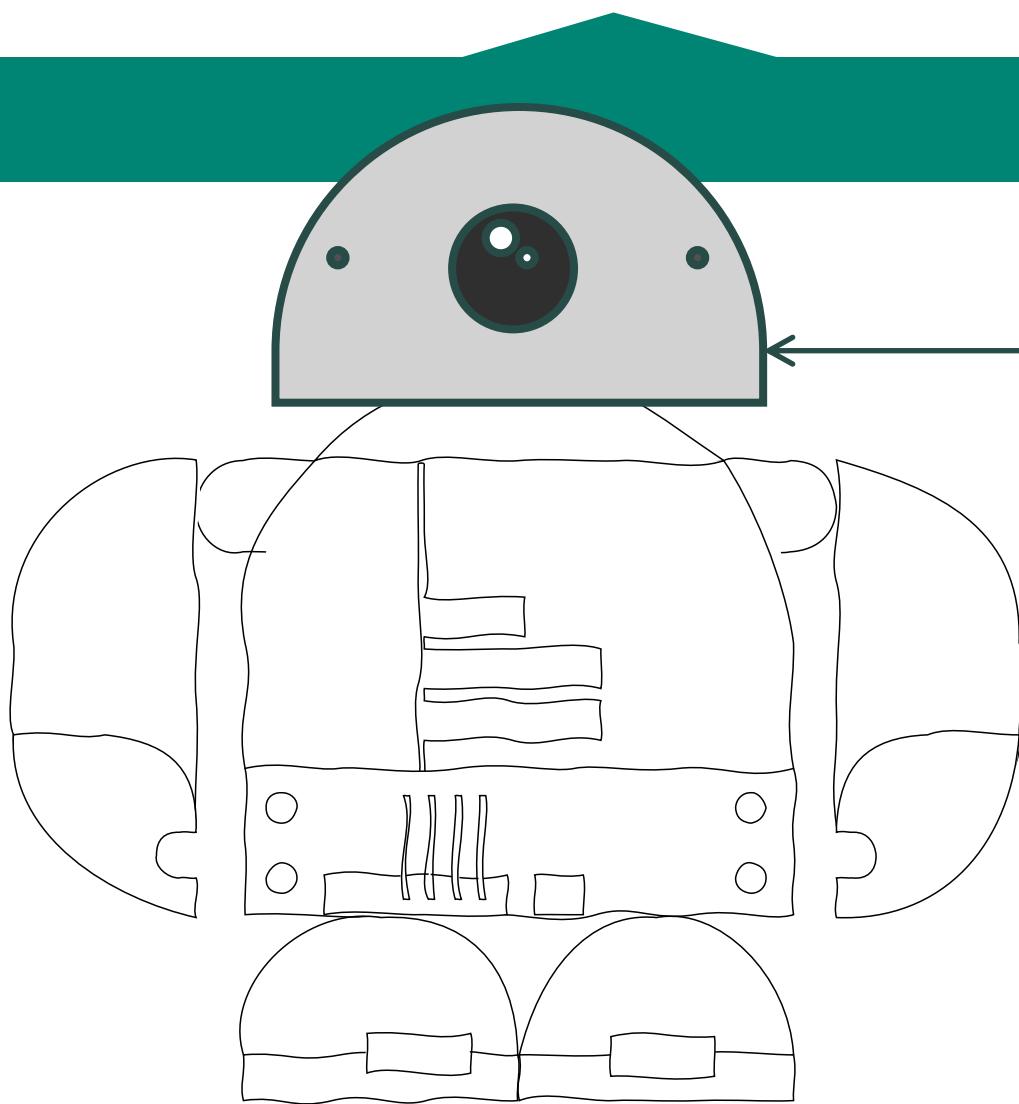


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1

Identity

BUILD STEPS

Creating user and group identities for frontline workers

...

Managing user and group identities for frontline workers

...

Configuring sign-in methods based on risk

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2

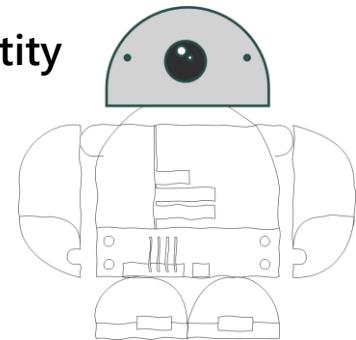
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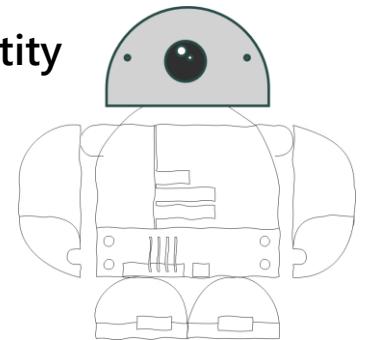
Creating user and group identities for frontline workers

How to:

- [Bulk create users in the Azure Active Directory portal | Microsoft Docs](#)
- [Add users and assign licenses - Microsoft 365 admin | Microsoft Docs](#)
- If your organization has SAP Success Factors, see [Tutorial: Configure SAP SuccessFactors to Active Directory user provisioning](#).
- If your organization has Workday, see [Tutorial: Configure Workday for automatic user provisioning](#).

Useful resources:

- [Microsoft 365 identity models and Azure Active Directory - Microsoft 365 Enterprise | Microsoft Docs](#)



Managing user and group identities for frontline workers

Good to know:

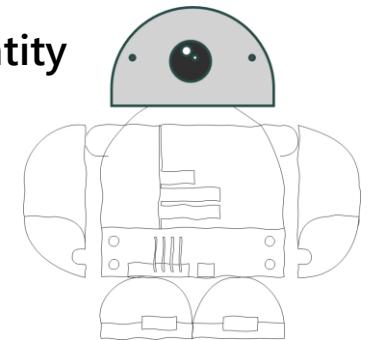
- If you choose to delegate use management to frontline team leaders with **My Staff** portal, we recommend that you review the [user documentation](#) for **My Staff** portal to ensure you understand how it works and how it impacts your frontline workers and their managers.

How to:

- For information on how to configure **My Staff**, see [Use My Staff to delegate user management - Azure AD | Microsoft Docs](#)
- Enable dynamic groups

Useful resources:

- [Microsoft 365 identity models and Azure Active Directory - Microsoft 365 Enterprise | Microsoft Docs](#)
- [Create or edit a dynamic group and get status - Azure AD | Microsoft Docs](#)



Configuring sign-in methods based on risk

Good to know:

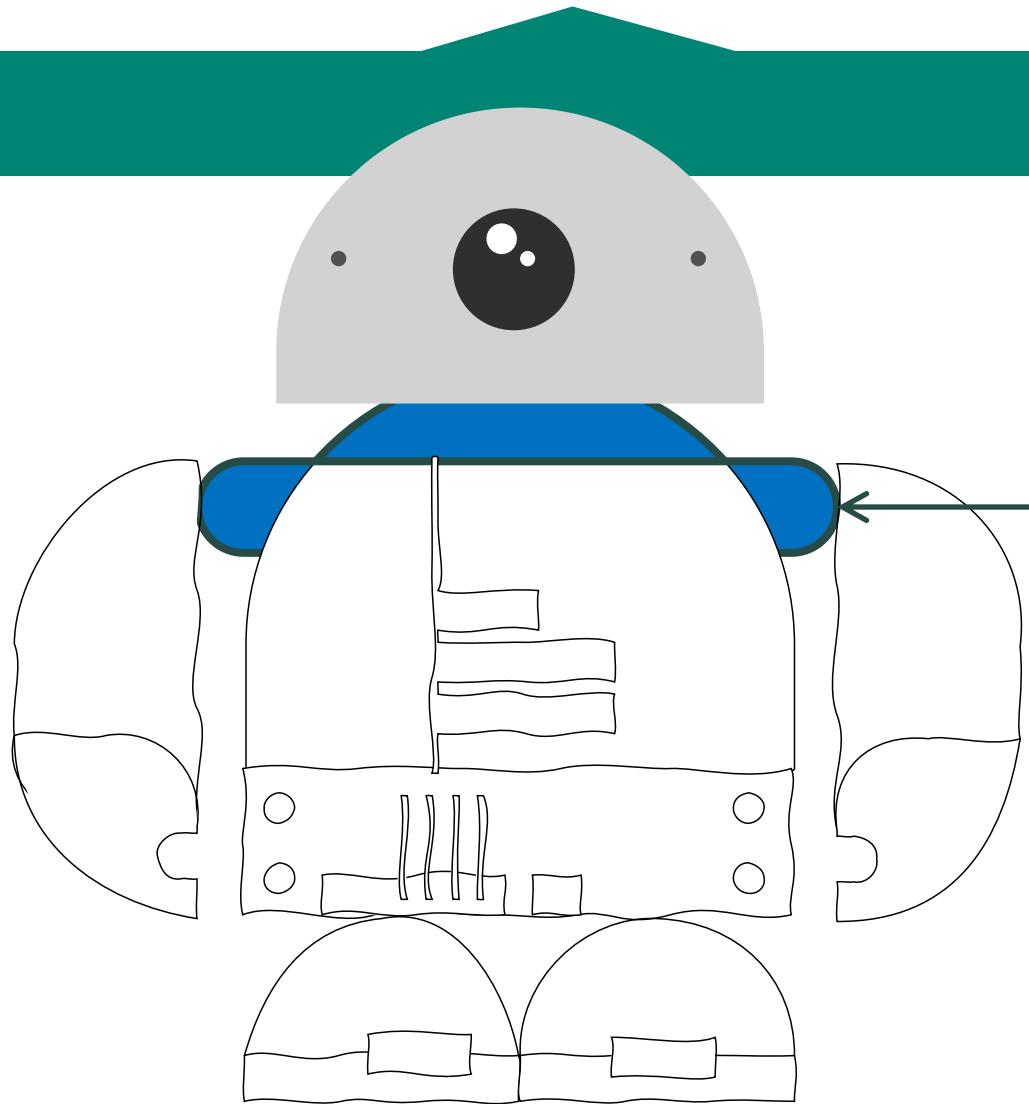
- There are several authentication and verification methods available in Azure Active Directory. SMS-based authentication lets users sign in without providing, or even knowing, their user name and password. After their account is created by an identity administrator, they can enter their phone number at the sign-in prompt. They receive an authentication code via text message that they can provide to complete the sign in. This authentication method simplifies access to applications and services, especially for Frontline workers.
- SMS-based authentication isn't currently compatible with Azure AD Multi-Factor Authentication.
- Except for Teams, SMS-based authentication isn't compatible with native Office applications.

How to:

- See [SMS-based user sign in for Azure Active Directory | Microsoft Docs](#) for information on how to enable SMS-based authentication for select users or groups in Azure AD.

Useful resources:

- [Microsoft 365 identity models and Azure Active Directory - Microsoft 365 Enterprise | Microsoft Docs](#)
- [Authentication methods and features - Azure Active Directory | Microsoft Docs](#)



2

License

BUILD STEPS

Assignment of licenses

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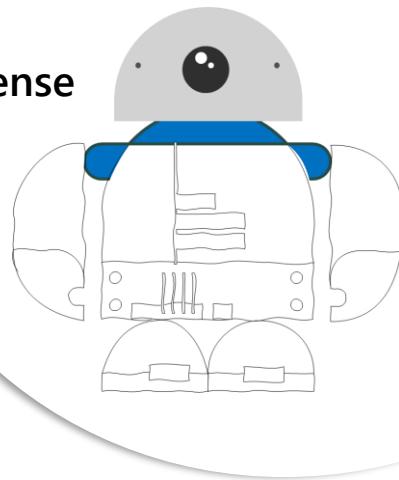
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Creating user and group identities for frontline workers

Good to know:

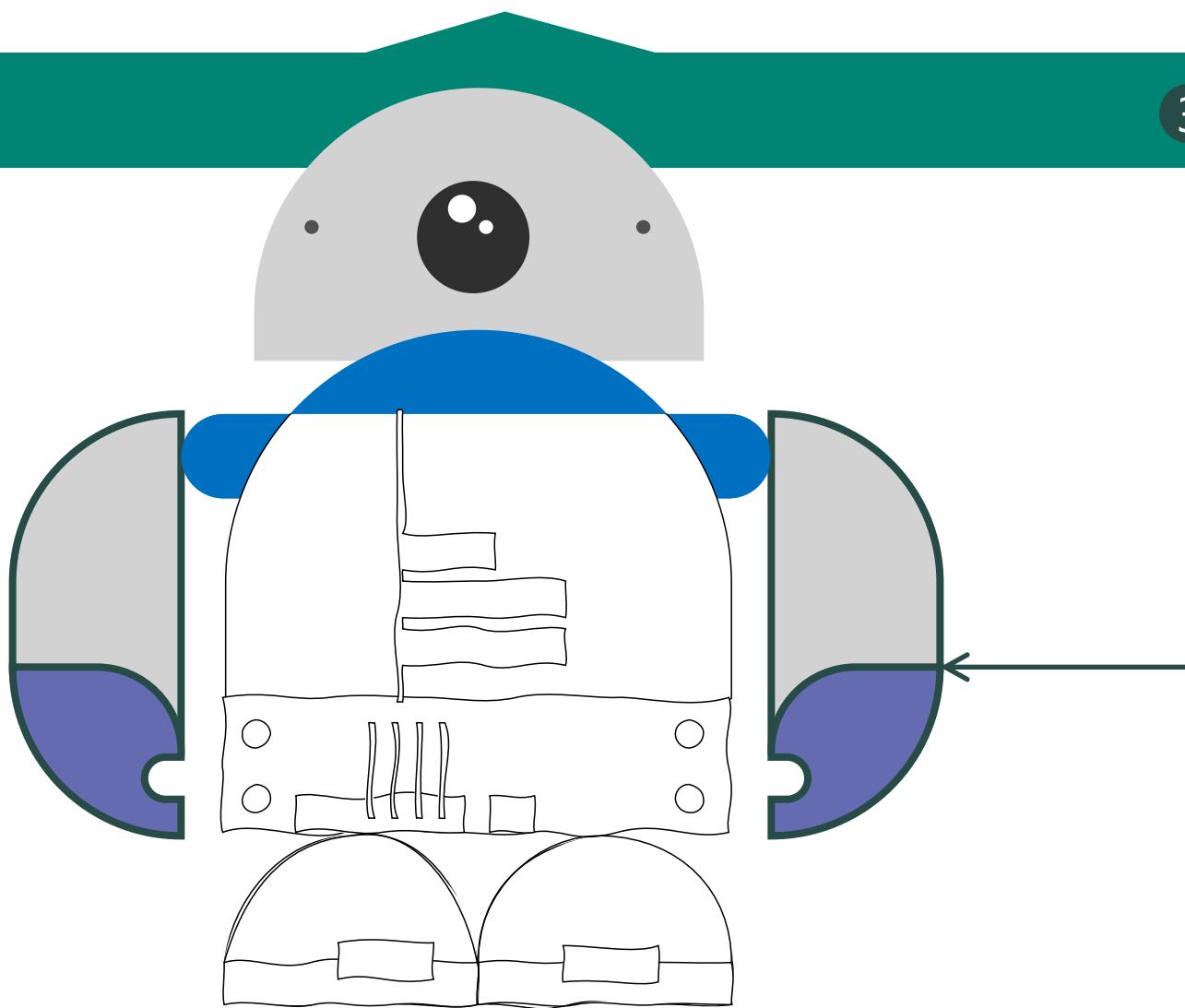
- Administrators can assign Microsoft 365 licenses in the following ways.
 - Using the Microsoft 365 Admin Center
 - Using PowerShell
 - Using Group-based licensing
- Group-based licensing is currently available only through the Azure portal. If you primarily use other management portals for user and group management, such as the Microsoft 365 portal, you can continue to do so. But you should use the Azure portal to manage licenses at the group level.

How to:

- [Admin Center instructions](#)
- [Admin Center video demo](#)
- [PowerShell instructions](#)
- [PowerShell video demo](#)
- [Group-based licensing instructions](#)
- [Group-based licensing video demo](#)

Useful resources:

- [Microsoft 365 identity models and Azure Active Directory - Microsoft 365 Enterprise | Microsoft Docs](#)



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3

Building block apps

BUILD STEPS

Managing, configuring and deploying
frontline worker apps in Teams

•••

Building blocks to enable

•••

Building blocks to empower

•••

Building blocks to transform

DO





Managing your building block apps

As an admin, the Manage apps page in the Microsoft Teams admin center is where you view and manage all Teams apps for your organization. Here, you can see the org-level status and properties of apps, approve or upload new custom apps to your organization's app store, block or allow apps at the org level, add apps to teams, purchase services for third-party apps, view permissions requested by apps, grant admin consent to apps, and manage org-wide app settings.

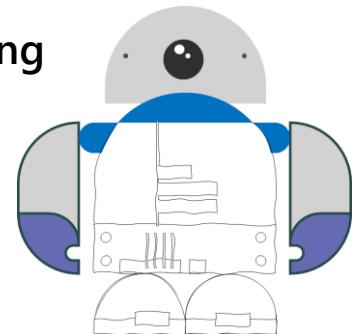
The Manage apps page gives you a view into all available apps, providing you with the information you need to decide which apps to allow or block across your organization. You can then use [app permission policies](#), [app setup policies](#), and [custom app policies and settings](#) to configure the app experience for specific users in your organization.

Use the Manage apps page to publish apps that are built specifically for your organization. After you publish a custom app, it's available to users in your organization's app store. There are two ways to publish a custom app to your organization's app store. The way that you use depends on how you get the app.

- [Approve a custom app](#): Use this method if the developer submits the app directly to the Manage apps page using the Teams App Submission API. You can then review and publish (or reject) the app directly from the app details page.

- [Upload an app package](#): Use this method if the developer sends you the app package in .zip format. You publish the app by uploading the app package.

**Building
block
apps**





Schedule management

The next page contains detailed list of actions against each key role in building a solution which features Shifts

Schedule management with Shifts in Teams

Schedule Manager	Shift worker	Admin
Displaying what matters in Shifts	Setting and display team member's availability	Enable Shifts
Configuring schedule settings	Swapping shifts	Audit log for Shifts actions
Enabling time tracking	Requesting time off	Shift-based tagging
Exporting timesheets	Enable Shifts reminders and notifications for requests	Extend Shifts to payroll, HR and other systems of record
Displaying tally of scheduled team members	Viewing team and my schedule	Configure Shifts connector
Shift-based tagging	Tracking time worked	
Reporting on hours worked	Communicating with your colleagues whilst on shift	
Recalling days from schedule	Targeted communication for scheduled colleagues with Shift-based tagging	

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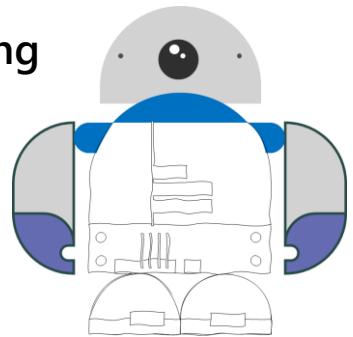
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Building
block
apps



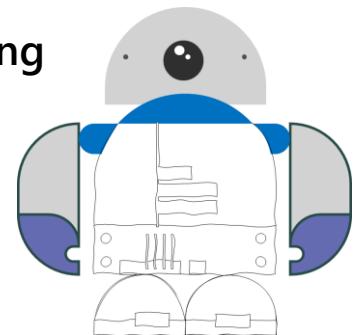
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Schedule management with Shifts in Teams

Building
block
apps



Schedule Manager

Displaying what matters in Shifts

Configuring schedule settings

Enabling time tracking

Exporting timesheets

Displaying tally of scheduled team members

Shift-based tagging

Reporting on hours worked

Recalling days from schedule

Shift worker

Overview and key terms

Setting and display team member's availability

Swapping shifts

Requesting time off

Enable Shifts reminders and notifications for requests

Viewing team and my schedule

Tracking time worked

Communicating with your colleagues whilst on shift

Targeted communication for scheduled colleagues with Shift-based tagging

Admin

Enable Shifts

Audit log for Shifts actions

Shift-based tagging

Extend Shifts to payroll, HR and other systems of record

Configure Shifts connector

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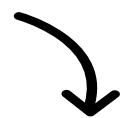
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Digitized processes

The next two pages contain detailed list of actions against each key role in building a solution which features Tasks and Approvals



Digitize processes with Approvals in Teams

Team Manager or Team member Admin

Understand data limitations
Understand data retention for approvals
Understand required permissions and licenses
Ensure Approvals is enabled and deployed at the org level
Auditing the Approvals App activities
Create org-wide approval templates

Plan your hierarchy for Task Publishing

Create the schema (CSV format) that defines:

- How all the teams in your hierarchy are related to each other
- The attributes to filter nodes so that publishing teams can more easily select the ones they want to publish tasks to

Manage published tasks list
Report on published tasks list
Apply your hierarchy using Teams PowerShell cmdlet

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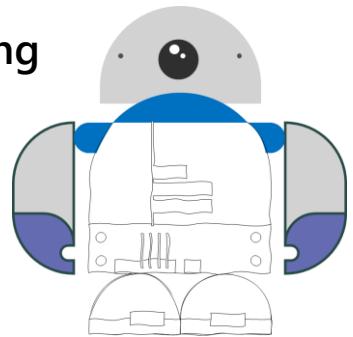
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Building block apps



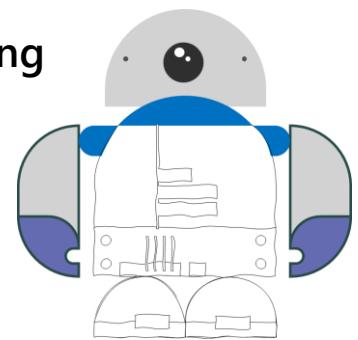
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Digitize processes with Tasks in Teams

Building
block
apps



Team Manager or Team member

Central Operations lead

Admin

Manage tasks

Facilitate task-based information

Review published tasks

Action published tasks

Ensure Tasks (by Planner and To Do) is enabled at the org level

Extend Tasks to your tech ecosystem

Plan your hierarchy for Task Publishing

Create the schema (CSV format) that defines:

- How all the teams in your hierarchy are related to each other
- The attributes to filter nodes so that publishing teams can more easily select the ones they want to publish tasks to
- The buckets to be made available to the publishing team to categorize tasks for the recipient teams.

Manage published tasks list

Report on published tasks list

Apply your hierarchy using Teams PowerShell cmdlet

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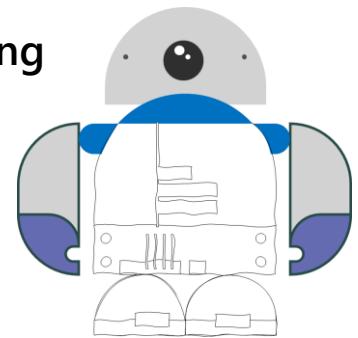
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Digitize processes with Approvals in Teams

Building
block
apps



Team Manager or Team member

Admin

Create an approval

Understand data limitations

Create an approval from a chat

Understand data retention for approvals

Create an e-sign approval

Understand required permissions and licenses

Create approval templates

Ensure Approvals is enabled and deployed at the org level

Auditing the Approvals App activities

Create org-wide approval templates

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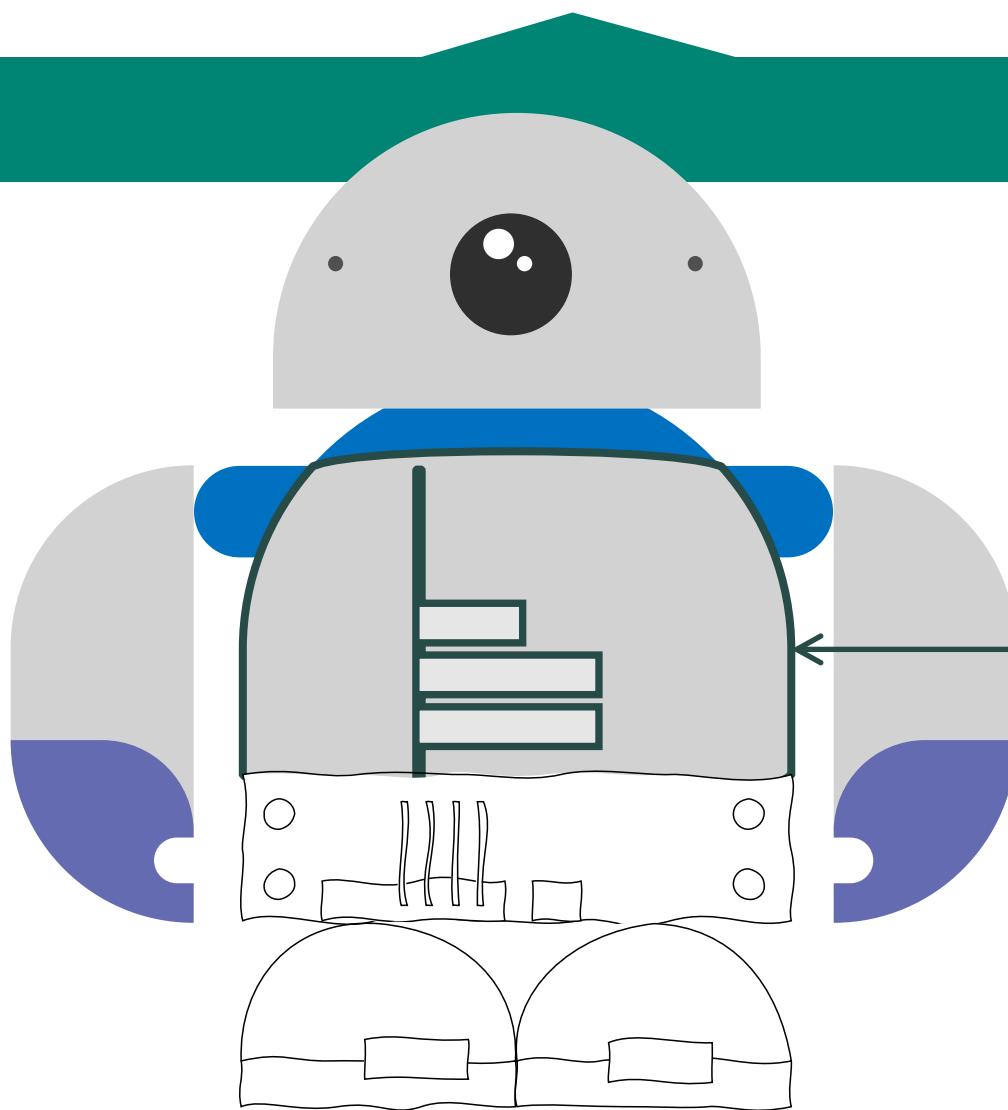
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Teams + channels

BUILD STEPS

Configuring Teams and Channels concepts
and the role of Tags and Chats

...

Leveraging Team templates

DO



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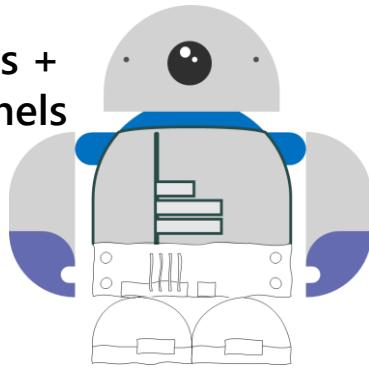


Teams and Channel structure

Useful resources:

- [Overview of teams and channels in Teams](#)
- [Set up groups and teams \(microsoft.com\)](#)
- [Provisioning Microsoft Teams at scale for Frontline Workers - Microsoft Teams | Microsoft Docs](#)

Teams +
Channels



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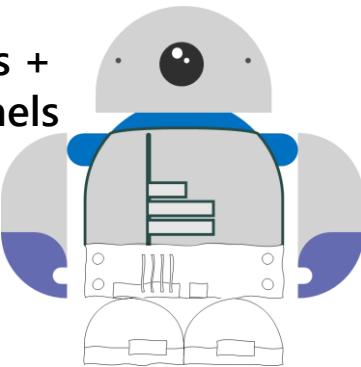


Team templates

Good to know:

Teams template policies let you create and set up policies for people in your organization so they can see only certain templates. You can use the Global (Org-wide default) policy and customize it or create one or more custom policies for those people that will be using templates.

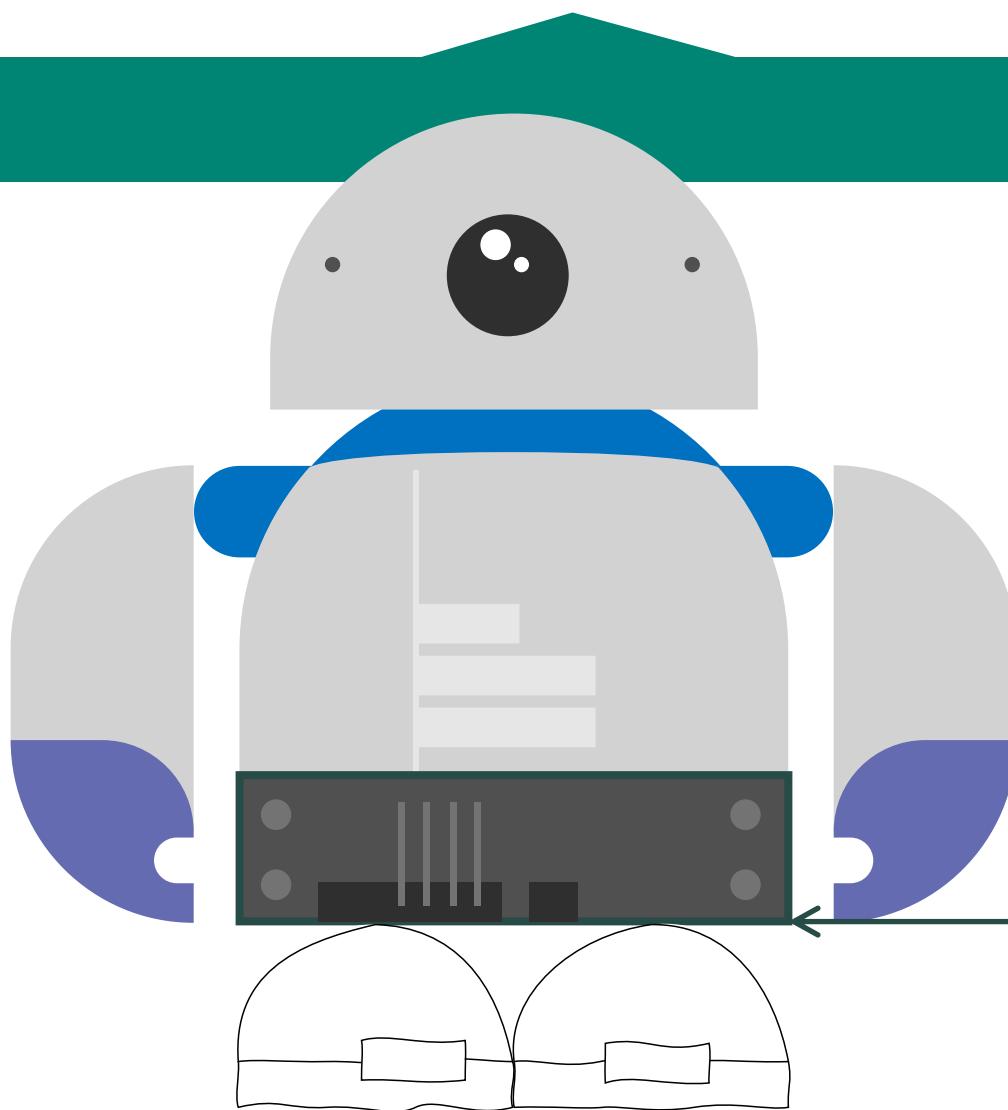
Teams +
Channels



Useful resources:

- [Get started with team templates using Microsoft Graph - Microsoft Teams | Microsoft Docs](#)
- [Use team templates in the admin center - Microsoft Teams | Microsoft Docs](#)
- [Use general team templates in the admin center - Microsoft Teams | Microsoft Docs](#)





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Policies + Permissions

BUILD STEPS

Permission and roles

...

Tagging

...

Team templates

...

App permission policies

...

App set up policies

...

Messaging policies

...

Policy packages

...

Shift-based access

DO



Permissions and roles

Good to know:

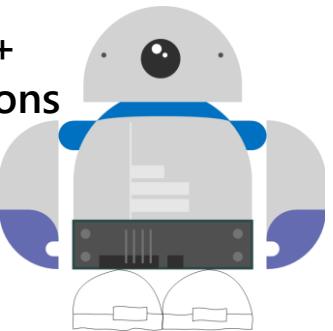
As an admin, you can use teams policies in Microsoft Teams to control what users in your organization can do in teams and channels. For example, you can set whether users are allowed to create private channels.

Team owners can modify Team settings.

Useful resources:

- [Manage team settings and permissions in Teams \(microsoft.com\)](#)
- For a deeper look at roles and permissions, see [Team owner, member, and guest capabilities in Teams](#).
- [Set up and manage channel moderation - Microsoft Teams | Microsoft Docs](#)

Policies +
Permissions



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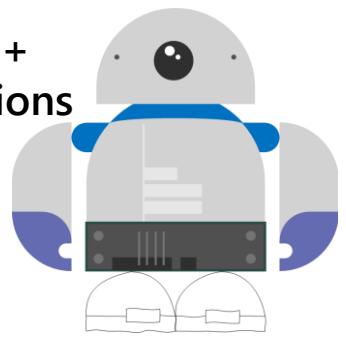


Tagging

Useful resources:

- [Manage tags in Microsoft Teams - Microsoft Teams | Microsoft Docs](#)
- [Using tags in Teams \(microsoft.com\)](#)

Policies +
Permissions



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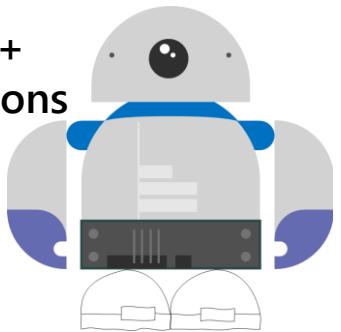
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Team Templates and Templates policies

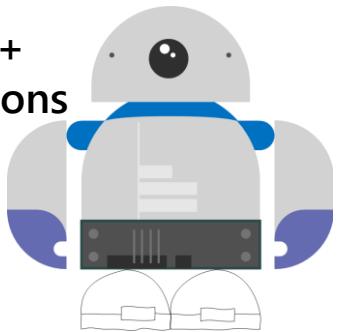
Good to know:

Teams template policies let you create and set up policies for people in your organization so they can see only certain templates. You can use the Global (Org-wide default) policy and customize it or create one or more custom policies for those people that will be using templates.

Useful resources:

- [Get started with team templates using Microsoft Graph - Microsoft Teams | Microsoft Docs](#)
- [Use team templates in the admin center - Microsoft Teams | Microsoft Docs](#)
- [Use general team templates in the admin center - Microsoft Teams | Microsoft Docs](#)





App permission policies

Good to know:

- App permission policies are also part of Frontline Worker and Frontline Manager policy packages.

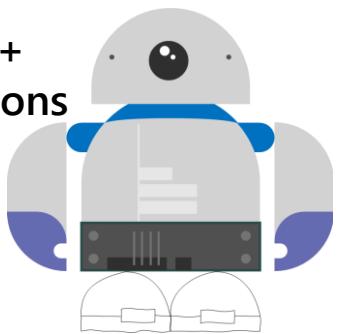
How to:

- Create a custom app permission policy
- Edit an app permission policy
- Assign a custom app permission policy to users

Useful resources:

- [Manage app permission policies in Microsoft Teams - Microsoft Teams | Microsoft Docs](#)





App set-up policies

Good to know:

- App setup policies are also part of Frontline Worker and Frontline Manager policy packages.

How to:

- As an admin, you can use app setup policies to install and pin apps to promote the most used apps
 - **Pin apps:** app setup policies let you choose apps to pin, set the order they show up in for your users, and control whether or not users can pin their own apps to the Teams app bar. For more information, see [Pin apps](#).
 - **Install apps:** app setup policies let you install apps on behalf of users when they start Teams and during meetings. For more information, see [Install apps](#).
 - **Upload custom apps:** app setup policies let you allow users to upload custom apps to Teams. For more information, see [Upload custom apps](#).

Useful resources:

- [Manage app setup policies in Microsoft Teams - Microsoft Teams | Microsoft Docs](#)

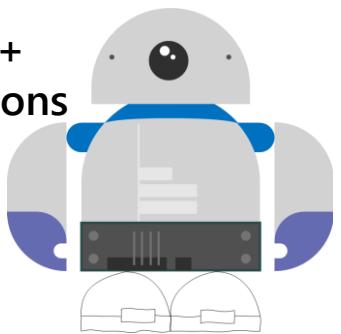


Messaging policies

Good to know:

- Messaging policies are also part of Frontline Worker and Frontline Manager policy packages.

Policies +
Permissions



How to:

- Create a custom messaging policy
- Edit a messaging policy
- Assign a custom messaging policy to frontline workers.

Useful resources:

- [Manage messaging policies in Teams - Microsoft Teams | Microsoft Docs](#)

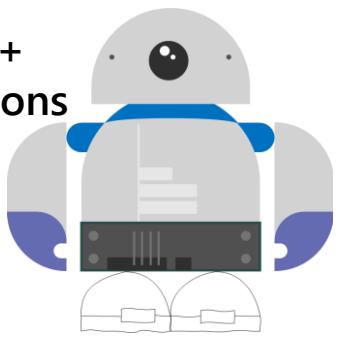


Policy packages

How to:

- Admins can use the [policy packages included in Teams](#) or [create your own custom policy packages](#).

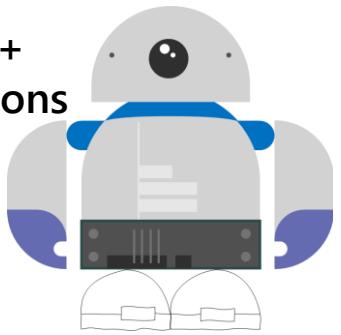
Policies +
Permissions



Useful resources:

- [Manage policy packages in Microsoft Teams - Microsoft Teams | Microsoft Docs](#)





Shift-based access

Good to know:

- These shift-based presence states— **On shift**, **Off shift**, **Busy**—are separate from the [default set of presence states](#) in Teams. With these two sets of presence states, you can configure different experiences for people in your organization based on their role.

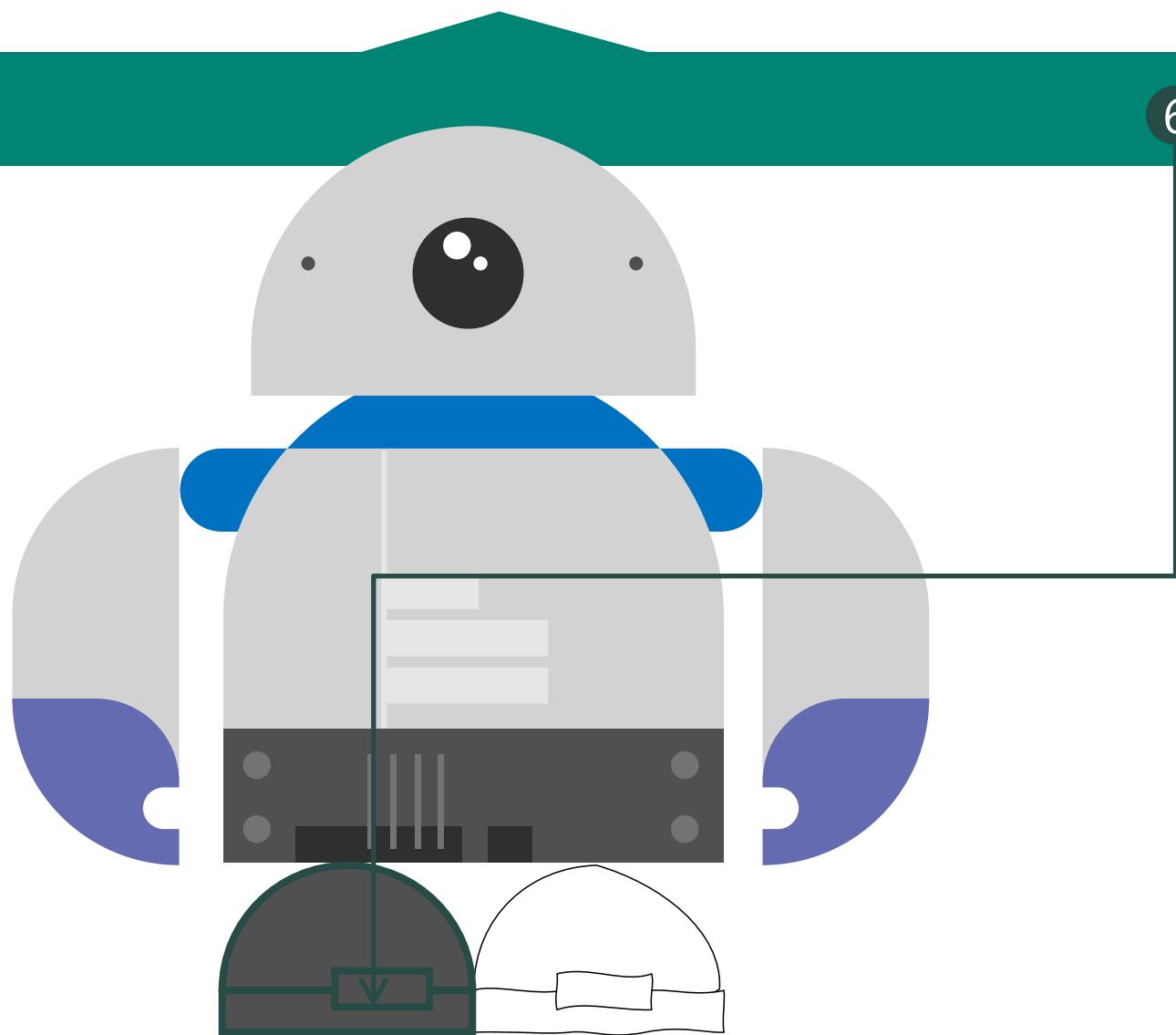
How to:

- As an admin, you use policies to control shift-based presence for frontline workers in your organization. You manage these policies by using the following PowerShell cmdlets:
 - [New-CsTeamsShiftsPolicy](#)
 - [Get-CsTeamsShiftsPolicy](#)
 - [Set-CsTeamsShiftsPolicy](#)
 - [Grant-CsTeamsShiftsPolicy](#)
 - [Remove-CsTeamsShiftsPolicy](#)
- Use the `New-CsTeamsShiftsPolicy` cmdlet to create a new policy, set the policy settings that you want, and then use the `Grant-CsTeamsShiftsPolicy` cmdlet to assign the policy to users.

Useful resources:

- [Manage shift-based access for frontline workers in Teams - Microsoft Teams | Microsoft Docs](#)





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Teams client

BUILD STEPS

How will your frontline workers get to the Teams app on their devices?

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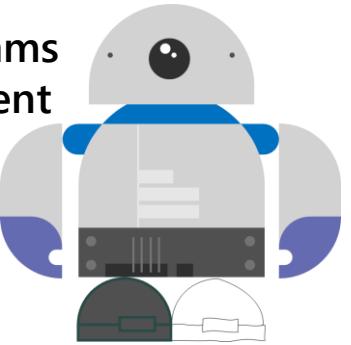


Getting the Teams app on their device

Useful resources:

- [Get clients for Microsoft Teams - Microsoft Teams | Microsoft Docs](#)
- [Teams desktop and mobile client download links](#)
- [Hardware requirements for Microsoft Teams - Microsoft Teams | Microsoft Docs](#)

Teams
client



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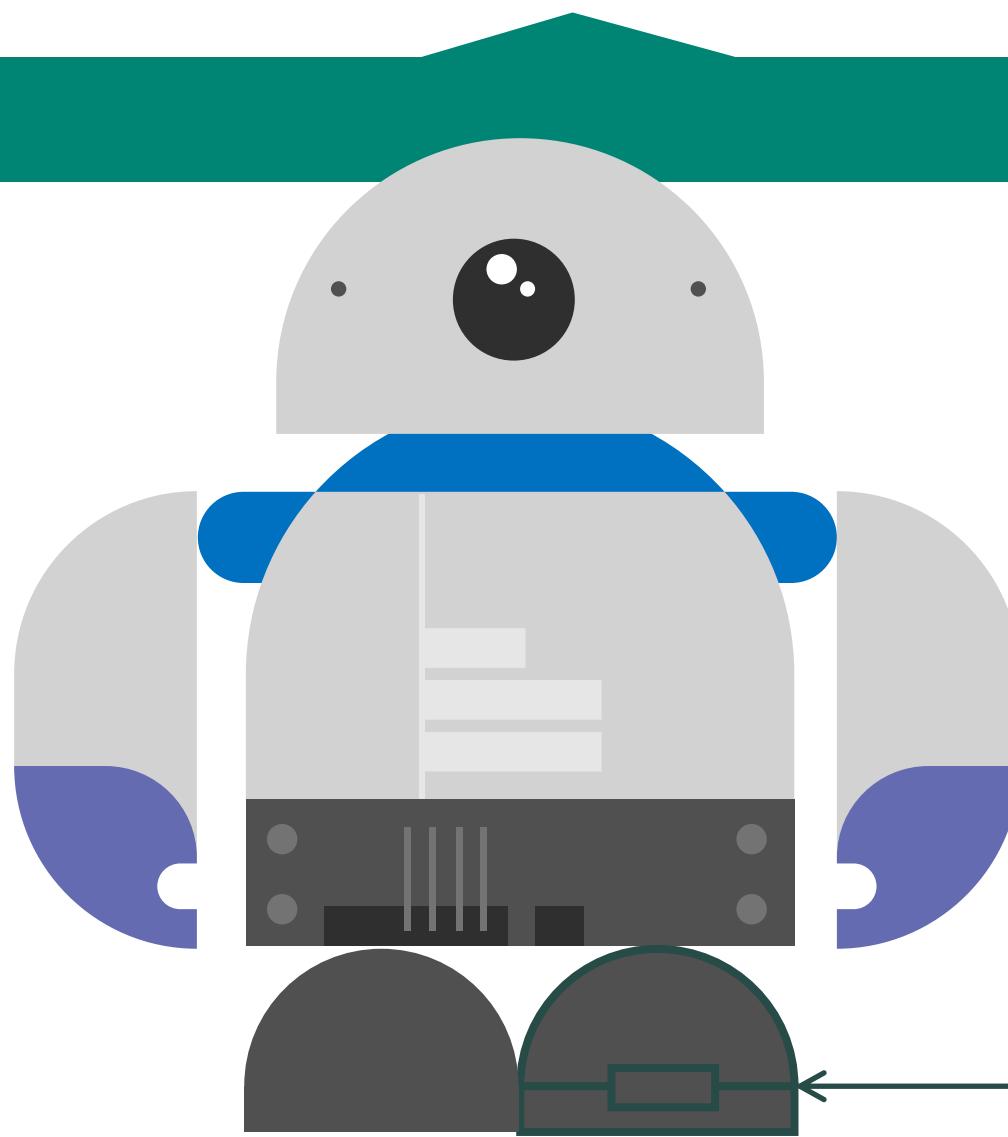


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Device

BUILD STEPS

- Accessories to support your solution
- Managing devices for frontline workers
- Azure Virtual Desktop

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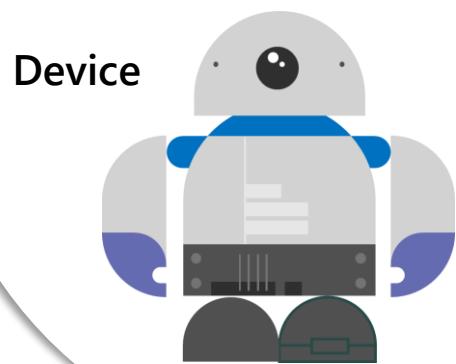




Managing devices for frontline workers

Easy Microsoft Endpoint Manager enables deployment and manages devices at scale through integrations with ecosystem automated enrolment services and tools from Google, Samsung, Zebra and Apple. These are techniques that make it quick and easy to get large numbers of devices enrolled and configured with minimal intervention directly on the device.

[Enabling frontline workers with Microsoft Endpoint Manager - Microsoft Tech Community](#)





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Validate through a pilot.



Validating your solution through a pilot



Iterate & Expand

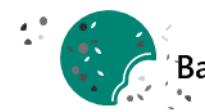
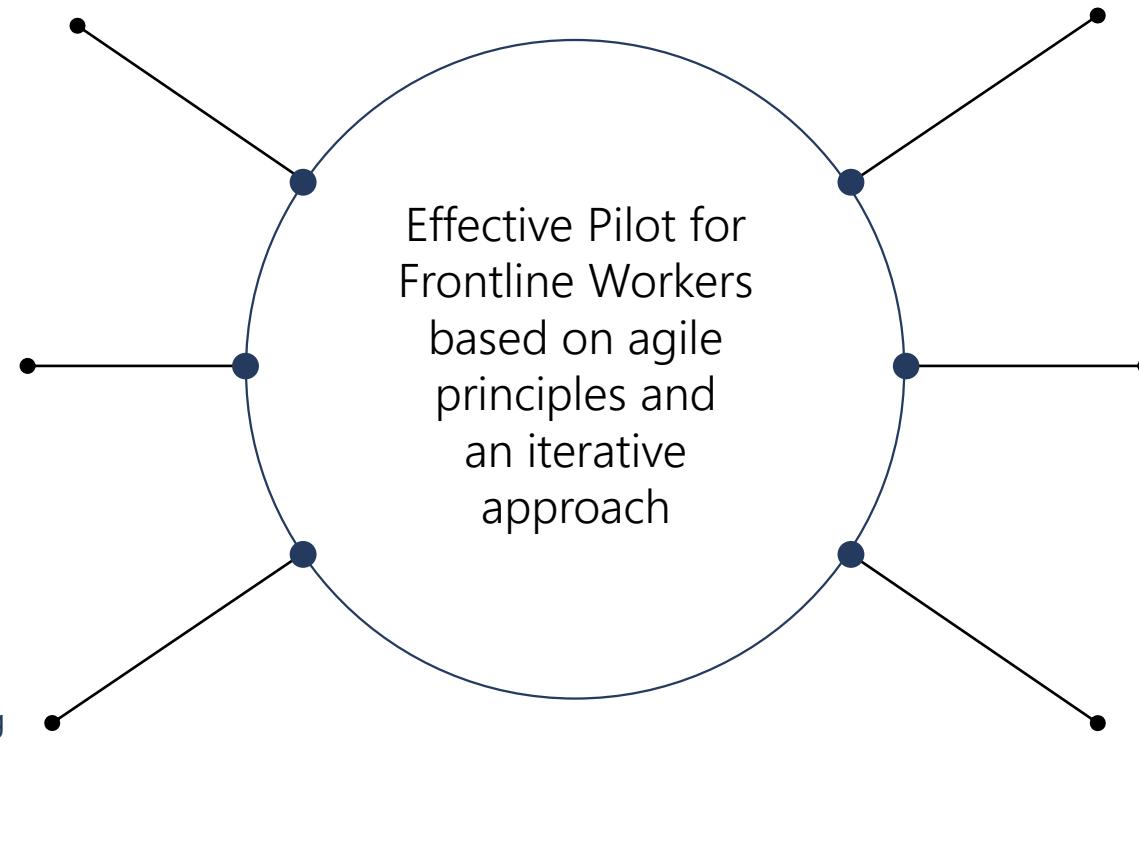
- ✓ **Adjust plan** based on feedback and success criteria
- ✓ **Expand Teams** to more capabilities or locations
- ✓ Iterate until ready for broad rollout

Measure feedback

- ✓ **Measure usage**
- ✓ **Assess user satisfaction feedback** and insights
- ✓ Capture results

Communicate and train

- ✓ Define **user readiness plan** including awareness, training and support
- ✓ **Communicate with participants** to start pilot on targeted scenarios



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Gather your people

- ✓ Define **project stakeholders**
- ✓ Identify **smallest logical grouping** and **pilot Frontline Workers**

Plan pilot logistics

- ✓ **Confirm scenarios** that best fit the organization
- ✓ Define **success criteria, feedback mechanisms** and **decision points** for next steps

Configure Teams

- ✓ Verify **pre-requisites**
- ✓ Complete **Teams configuration**





Gather your people

Gather your people

Assemble a group of individuals from your business, IT and Frontline communities to act as the stakeholder and decision-making group for your Teams Pilot for Frontline Workers.

Be sure to include individuals from all 3 communities to ensure a successful journey.

Identify the smallest logical grouping for your organization. For example, one division, one plant, one function, etc.

The key is to optimise around the average Frontline worker being part of one team only. Managers or specialists may be in more than one team.



- Who will participate in your Pilot?
- Who would care about the benefits you've listed?
- What's the smallest logical grouping for your organization?

Configure Teams





Planning pilot logistics



Introduction

Feedback surveys give you an understanding of what value your organization can derive from adopting Microsoft Teams for their Firstline Workers and how to shape that experience. With this feedback data, you can take informed next actions on designing the experience for these workers to increase your chances of launch success and long-term adoption.

Within this document, we provide you with feedback surveys for the following milestones:

- **Pre-pilot survey**
 - Audience: Firstline workers and managers
 - Goal: establish a baseline of current tools and needs
- **Post-pilot survey**
 - Audience: Firstline worker and manager pilot users
 - Goal: to get an understanding of how pilot users feel about Microsoft Teams and their experiences



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- Simplicity is key!
- Utilize the *Pre-Pilot survey* in your **supporting_assets/adoption_assets** folder to inventory the tools, capabilities, and additional scenarios.
- Confirm 1-3 scenarios that best fit the pilot group.
- Define success criteria, feedback mechanisms and decision points for next steps.



- Have the use case(s) to be piloted been identified?
- What benefits are you expecting and measuring?
- How will you measure these benefits?
- How will you monitor usage of Teams?

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Definitions to help build your success criteria

Gather your people

Plan pilot logistics

Configure Teams

KPI Measure / Name	A high-level summary for the measure. For example, the number of employees that are members of Teams.
KPI Reporting Frequency	The cadence that reporting runs on for this metric.
KPI Formula	The details of the calculation ensuring it's connected to the data sources and instruments below.
Data Sources	Details on exactly where the data is coming from. How many people? Which groups? Which systems?
Data Gathering, Transformation, & Analysis Process	How is the data being pulled from the data sources? For example, is this a dynamic pull at 7 a.m. the first Monday of the quarter, or is this an extract from a static file that is always two weeks old?
Data Gathering Instruments	Do we need to create any instruments (surveys, feedback forms) or create guides on data transformation to collect the data we want?
Data Gathering Owner	State which person, or group of people, is assigned to each part of the data gathering, transformation, and analysis process.

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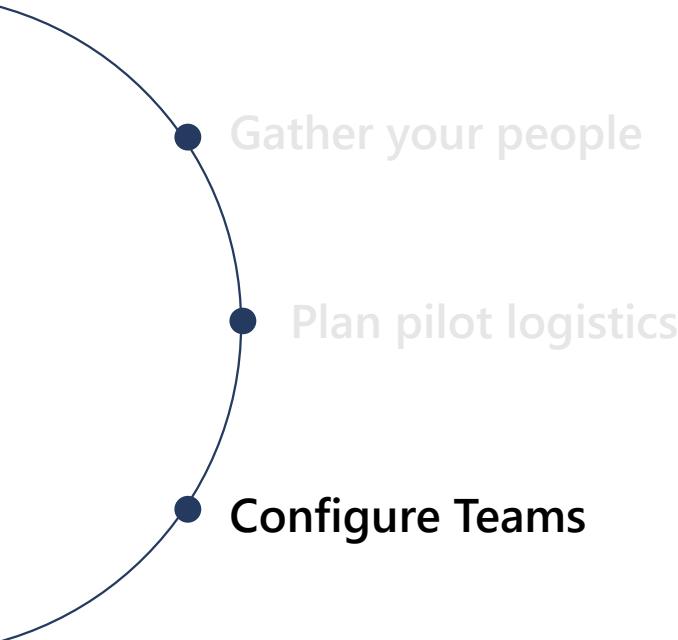
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Teams App set-up



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- Verify [Prerequisites and environmental dependencies for Teams](#) are completed.
- Control which chat and channel messaging features are available to your pilot users in Microsoft Teams by configuring [messaging policies](#).
- Consider if setting up moderation in your channels is necessary for the pilot. Team owners can turn on moderation for a channel to control who can start new posts and reply to posts in that channel. For more information, see [Set up and manage channel moderation in Microsoft Teams](#).
- Use [teams policies](#) in Microsoft Teams to control what users in your organization can do in teams and channels. For example, you can set whether pilot users are allowed to discover private teams in search results and in the team gallery and whether pilot users are allowed to create private channels.
- Use [app setup policies](#) to customise Microsoft Teams to highlight the apps that are most important for your pilot users and defined scenarios. You choose the apps to pin and set the order that they appear.



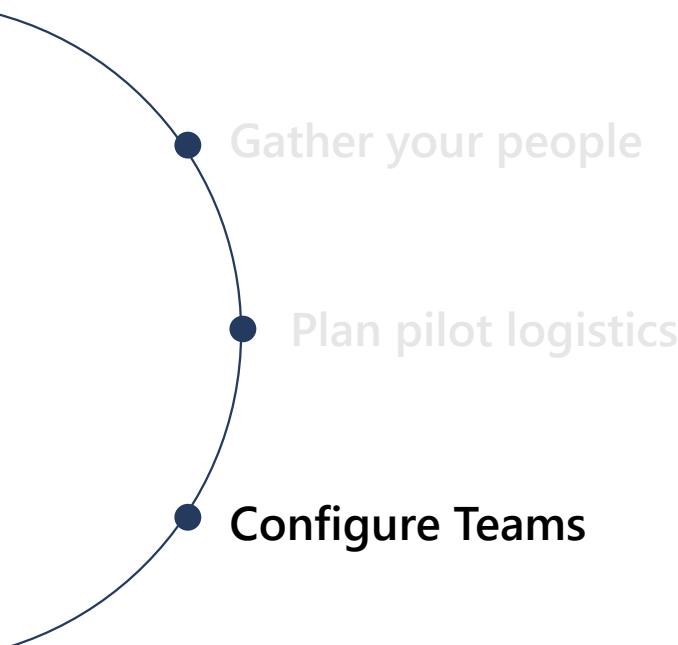
- What Teams capabilities will you need to enable for a successful pilot? Have these been enabled for your pilot users? (e.g. Shifts)
- What apps will your pilot users see pinned in their Teams client – 1st, 2nd and 3rd party apps?
- Will pilot users, on mobile devices, have favorite channels displayed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

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People & basics



- Your pilot users are licenced to use the capabilities you are piloting. To learn about licensing requirements, read [Office 365 licensing for Teams](#).
- Decide the Teams client required for the pilot. Teams supports a number of clients from web to desktop to mobile, and the default configuration lets users choose whichever clients they want. To learn more, see [Get clients for Teams](#).

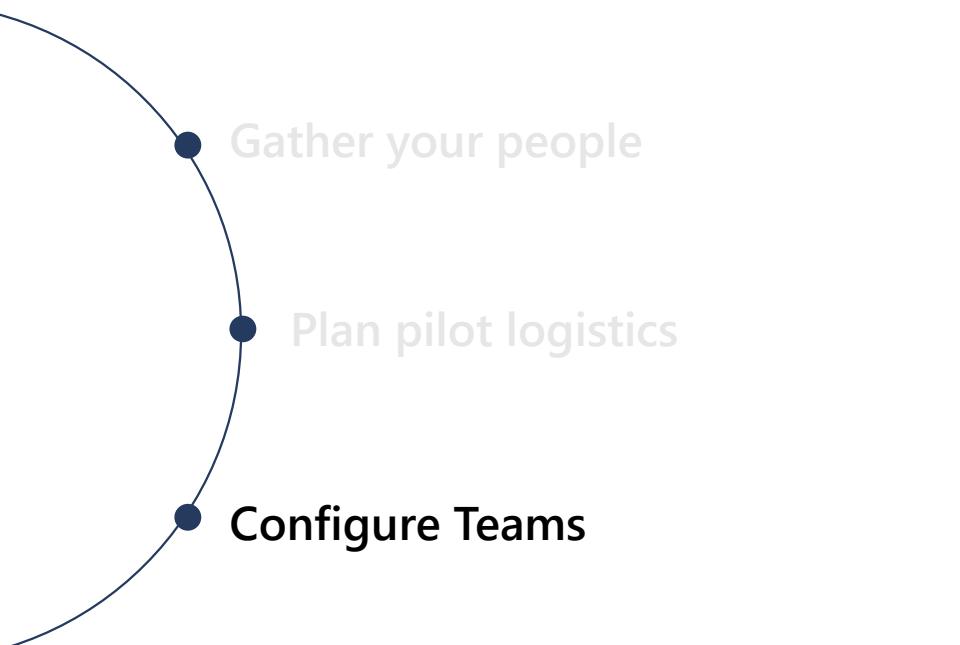


- How will your pilot users log in to Teams?
- How will your pilot users change their log-in?
- How will your pilot users be added to the relevant Teams? (self-joined, invited by Team owner or added by IT)
- Will you need people to be added dynamically?
- How will your pilot users get to the Teams app – 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



- To turn on external access, see [Let your Teams users chat and communicate with users in another Teams organization](#).
- To turn on guest access, see [Turn on or off guest access in Teams](#).
- To customize guest access feature availability, see [Authorize guest access in Teams](#).



- Will you need to turn on external access for your organization? If enabled, will you 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)

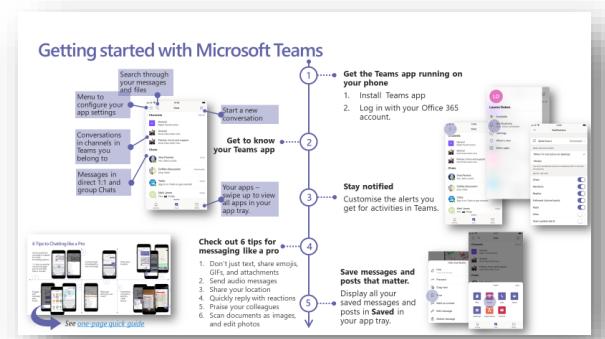


Communicate and train



- 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?

- Define user readiness plan including awareness, training and support on targeted scenarios
- Inform your Frontline Workers of their participation in the pilot, the pilot goals, and provide training, if necessary, on the basic functions.
- Before building your Awareness Plan, take time to understand who needs to be informed, key messages to convey, and preferences for communication channels.



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Iterate & Expand

Measure feedback

Communicate and train

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Measuring feedback



- Who needs to see the Teams usage reports, and do they have the correct role to view them?

- Measure usage, assess user satisfaction feedback and insights. If one of your key stakeholders isn't an admin but needs access to reporting, [assign the Reports reader role](#).
- Empowering your Frontline Workers is more about people than technology. To understand the impact of Teams, stay focused on your Frontline Workers' experience.
- Survey them before, during and after the Pilot in to understand their needs, pain points, and reactions.
- If you are iterating your pilot and adding new features over time, this feedback can help guide the order, pace, or even whether additional features are needed.

Iterate & Expand

Measure feedback

Communicate and train



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DO

Adopt at scale, optimise and iterate. Best practices and final thoughts.



Key success factors

Best practices across high achieving customers

- | | | | |
|---|---|---|--|
| 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 |



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Achieve more value with Teams

Learn how others are realizing value:

- [View customer stories](#)
- Maximizing the Impact of Firstline Workers with Microsoft 365: A Forrester Total Economic Impact™ Analysis of Microsoft 365 Solutions for Firstline Workers

Empower your frontline workers with end user resources:

- [Microsoft Teams video training](#)

Stay connected with ongoing innovation for Microsoft Teams:

- [Microsoft Teams Blog](#)
- [Microsoft 365 Roadmap](#)

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