

Microsoft 365 Adoption Planning





The Success Factors outlined in this deck will help make sure you're set up for a successful roll-out, no matter what your business challenges.

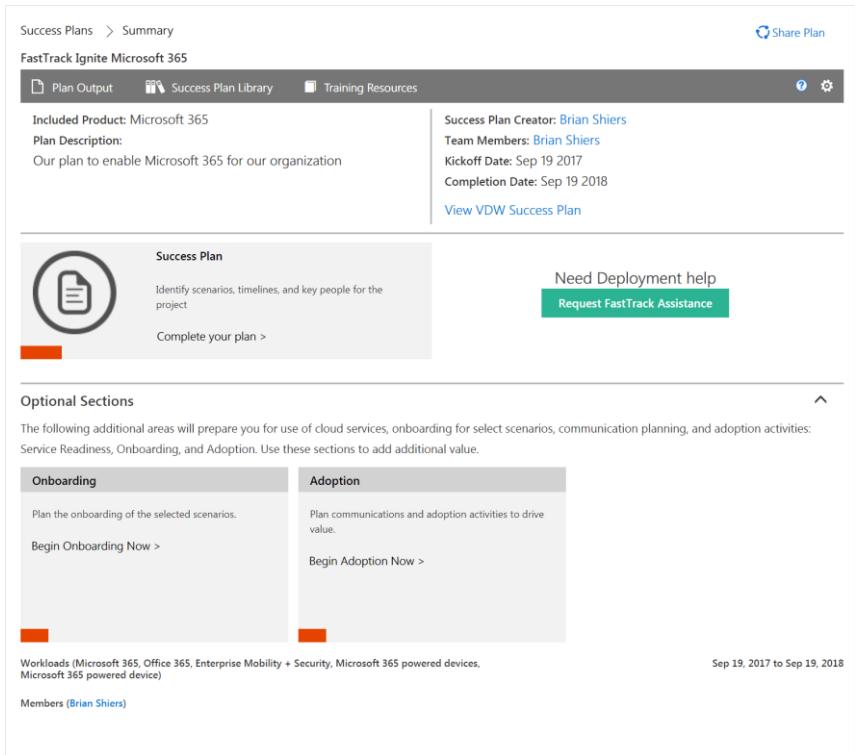
Throughout this deck, you will find templates to help you facilitate your organization's Microsoft 365 adoption planning.

In addition to using these slides, creating a Success Plan (as outlined on the next slide) within the FastTrack portal will help you build and execute on your adoption plan.



Create a Success Plan

A Success Plan is critical to your roll-out as it provides you with a roadmap to realizing your goals with Microsoft 365.



The screenshot shows the 'Success Plans > Summary' page for the 'FastTrack Ignite Microsoft 365' plan. The page includes a navigation bar with 'Plan Output', 'Success Plan Library', and 'Training Resources'. It displays basic plan details: 'Included Product: Microsoft 365', 'Plan Description: Our plan to enable Microsoft 365 for our organization', and 'Success Plan Creator: Brian Shiers'. It also shows team members, kickoff date (Sep 19 2017), completion date (Sep 19 2018), and a link to 'View VDW Success Plan'. Below this, there's a 'Success Plan' section with a 'Success Plan' button and a 'Need Deployment help' section with a 'Request FastTrack Assistance' button. At the bottom, there's an 'Optional Sections' section with 'Onboarding' and 'Adoption' tabs, and a note about preparing for cloud services. The footer shows workloads (Microsoft 365, Office 365, Enterprise Mobility + Security, Microsoft 365 powered devices, Microsoft 365 powered device) and a member named Brian Shiers.

How to create a Success Plan

- 1 Log into the FastTrack site using your Microsoft 365 organization ID: <https://fasttrack.microsoft.com>
- 2 Click "Start a new plan"
- 3 Complete the create wizard and click "Finish"
- 4 Select the scenarios in the Success Plan and click Save & Continue
- 5 Enter the timeline details for each scenario and click Save & Continue
- 6 Enter the stakeholders in the contacts and click Save & Finish

Microsoft 365 Success Factors

Based on engagements with thousands of customers, we have identified the four Success Factors for driving end user adoption. Throughout this presentation we will look at each of these Success Factors and how to implement them during a Microsoft 365 roll out.

LEARN AND REINFORCE



Stakeholders

Recruit executive sponsors
Empower champions



Scenarios

Prioritize your scenarios
Define success criteria



Awareness

Implement comms campaign
Execute launch events



Training

Train end users
Ready help desk

Stake



Stakeholders

Executive sponsors

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

Success Owner

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

Champions

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



Mott MacDonald developed a network of technology champions by engaging the employees who are most interested and enthusiastic about the new capabilities. The company makes sure the champions are well-trained and sends them out into the business to coach and communicate with their colleagues.

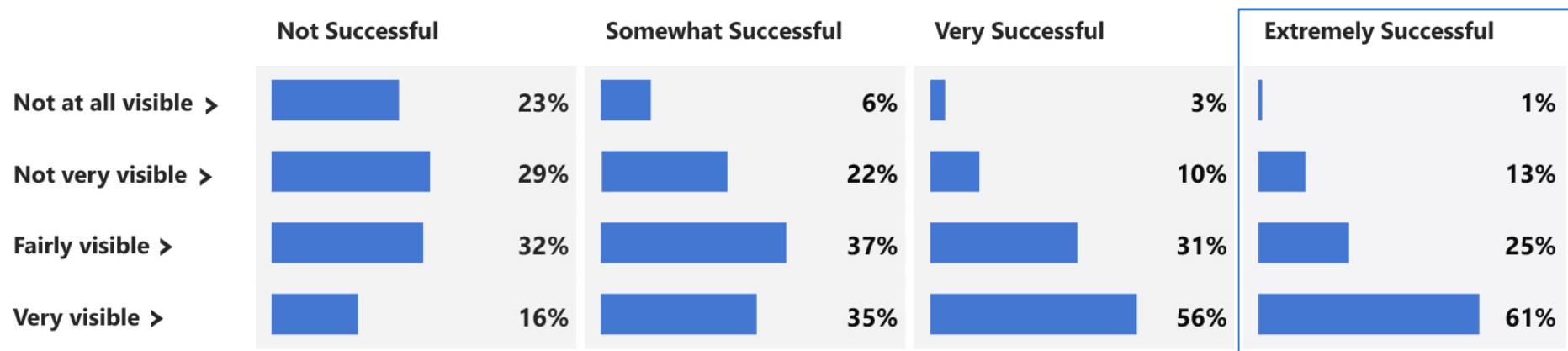


Why is the role of an Executive Sponsor crucial for project success?

An actively engaged executive sponsor is one of the top drivers of project success.

How Visible was the CEO's or Business Unit Leader's Involvement in the Transformation The Value of Visibility

Success of Transformation



Adapted exhibit from "Creating organizational transformations", July 2008, McKinsey Quarterly, www.mckinsey.com
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How can Executive sponsors drive Microsoft 365 success?

Executive sponsors should:

- Help the project team identify and prioritize which Business Scenarios should be used
- Play a role in communicating the vision to other leaders across the organization
- Actively participate and use the Microsoft 365 capabilities to help drive adoption across end users and reinforce desired behaviors

Ensure they understand the ABCs¹

- A** Active and visible participation
- B** Building a coalition with their executive peers
- C** Communicating directly with employees

1: Prosci®. All rights reserved.

Who are Success Owners and why are they important?

Success Owners ensure business goals set for Microsoft 365 are realized by ensuring people use the service and get value from it.

Success Owners should:

- Ensure people use and get value from Microsoft 365
- Help ensure the right stakeholders are involved
- Translate the business goals your organization has set for Microsoft 365 into Microsoft 365 scenarios
- Ensure communications and training are successfully implemented



Who are Champions?

Champions will evangelize and help train their teams on the new ways of working. They build awareness, understanding, and engagement throughout the community.

- Ensure people use and get value from Microsoft 365
- Help ensure the right stakeholders are involved
- Translate the business goals your organization has set for Microsoft 365 into Microsoft 365 scenarios
- Ensure communications and training are successfully implemented



We connect with an adoption Champion in each business unit, who sends out weekly emails on Office 365. Each Office 365 tool has core benefits, and by taking users on a smooth journey through them, we are able to unlock the value in each one.

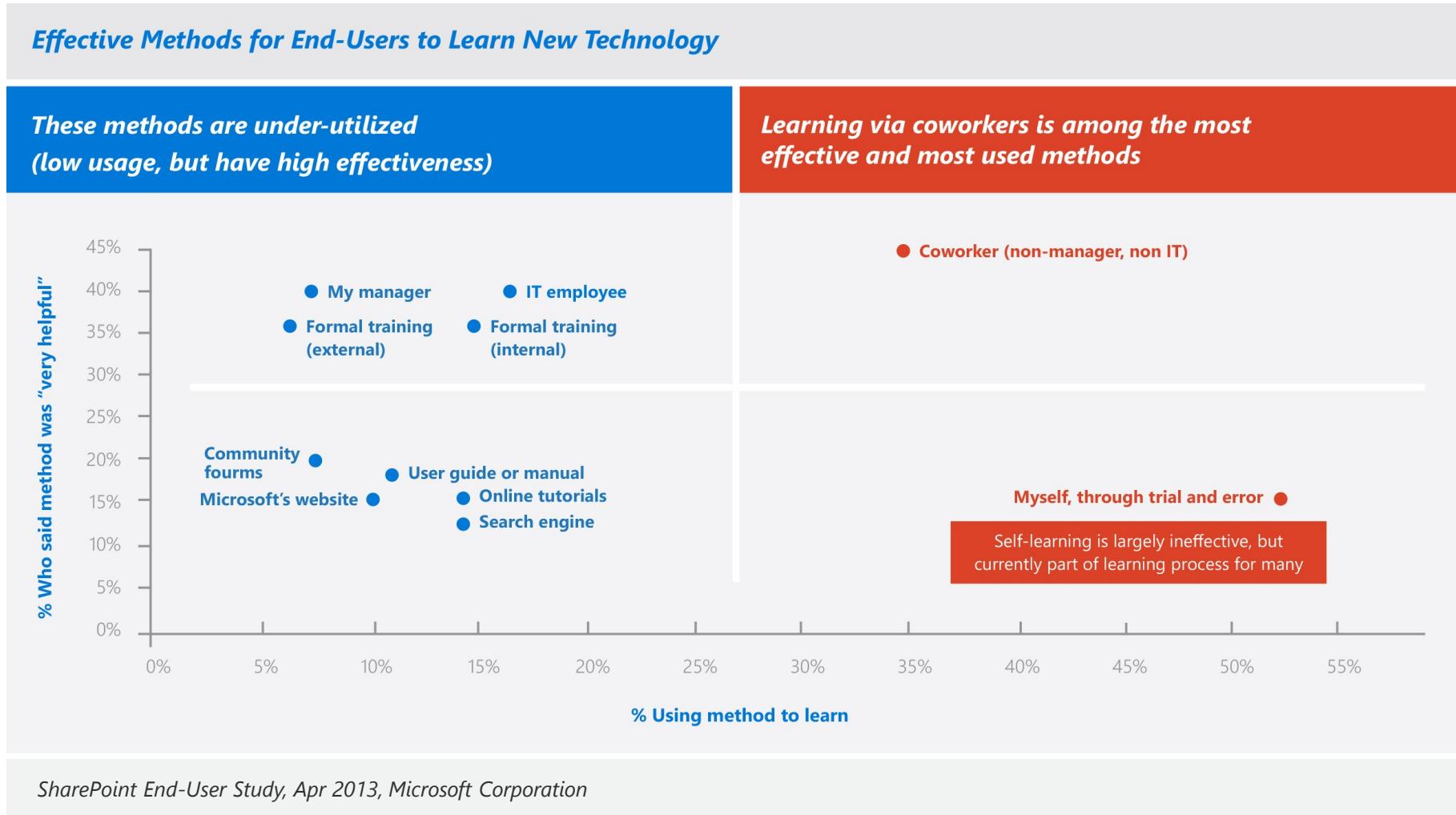
Nick Lamshed
Change Consultant, Qantas



Why are Champions important?

Learning via coworkers is among the most effective and most used methods

In a Microsoft End-User study, research indicates learning from co-workers is among the most effective and used methods in learning a new technology





How will Champions support rollout?

Champions will help reduce the strain on the resources of the core project team, and help drive engagement throughout the community.

Champions will help to:

- 1 Create the groundswell and enthusiasm that grows adoption of improved ways of working.
- 2 Build a circle of influence amongst their teams.
- 3 Bring the new ways of working to life across teams.
- 4 Identify business challenges and possible solutions.
- 5 Provide feedback to the project team and sponsors.



How will Champions help you scale?

Champions will evangelize and help train their teams on the new ways of working. They build awareness, understanding, and engagement throughout the community.

Responsibilities of a Champion:

- 1 Evangelize Microsoft 365 and its value across teams.
- 2 Help people in their team understand what is in it for them.
- 3 Build awareness of Microsoft 365 through informal communication channels.



Build a sustainable **Champions** community

Champions help build, grow, and sustain the Microsoft 365 roll-out by evangelizing and helping their peers with the new solutions.

Champions:

- 1 Should be formally trained to increase their depth and breadth of knowledge.
- 2 Should be encouraged and empowered to guide, teach, and train their peers.
- 3 Need consistent positive reinforcement that affirms the impact of their efforts.
- 4 Need a clear plan upon which to execute.

CUSTOMER STORY: Mott Macdonald

The screenshot shows a video player interface. At the top, there is a grid of small profile pictures of people, each with their name and some text below it. Below this is a larger video frame showing a man in a suit speaking. In the bottom left corner of the video frame, there is a large white 'M'. In the bottom right corner, the text 'MOTT MACDONALD' is displayed in a bold, sans-serif font. The overall theme is professional and corporate.

Name	ID	Grade	Unit	Location	Description
Harding, Lynne	0763254	Grade: F	Unit: Buildings and Infrastructure	Division: Eastern	
Brad, Wilson	0345634	Grade: E	Unit: Divisional	Unit: East	Divisions: Northeast Trans & Infrastructure
McDonald, H	0200664				
Alshai, AHN	0210154	Grade: D	Unit: Middle East Unit	Unit: Middle East Unit	
Molinami, Ana	0290452	Grade: E	Unit: Africa Design Services	Unit: South Africa	
Ling, Grace	0999123				
Banerjee, Anju	0251002	Grade: E	Unit: Middle East & South Asia Corp	Unit: Middle East & South Asia Corp	
Lee, M	0702080	Grade: E	Unit: Middle East & South Asia Corp	Unit: Middle East & South Asia Corp	
Perry, Christine	0991319				

Champions program

- Regular **Champion-peer** networking and sharing
- Microsoft quarterly updates via email and optional call (member topics, latest news, tips and resources)
- Invitations to join premier events and industry meetups as a Microsoft 365 Champion
- Access to Microsoft subject matter experts and unique Microsoft 365 training and content

For Microsoft 365 business users in the know

Sign up today!

<http://fasttrack.microsoft.com/office/champion>



Other roles to consider

Role	Responsibilities	Department
Project Manager	Oversee the entire Microsoft 365 launch execution and roll-out process	Project Management
Training Lead	Manage and communicate training content about Microsoft 365	IT and/or Human Resources
Department Leads	Identify how specific departments will use Microsoft 365 and encourage engagement	Any department (management)
IT Specialist	Oversee all technical aspects of the roll-out, including integrations	IT
HR Manager	Integrate Microsoft 365 into HR processes and manage HR content on Microsoft 365	Human Resources (management)
Communication Lead	Oversee company-wide communications about Microsoft 365	IT and/or Corporate Comms
Community Manager	Manage day-to-day Yammer network activity; provide guidance and best practices	IT and/or Corporate Comms
SharePoint Site Manager	Help manage SharePoint site strategy for the organization, serve as the link between business side and IT	IT and/or staff

Note: Though we recommend having each of these roles fulfilled throughout your roll-out, you may find that you don't require them all to get started with your identified solutions.

Scena





Identify and Prioritize Scenarios

Why Scenarios are important:

- Allow teams to understand how Microsoft 365 can help them achieve more
- Act as inputs and validation of Microsoft 365 awareness messaging
- Support awareness and readiness activities by putting products in context; people will know when and how to use them



What is a Scenario?

Scenarios cover the ways your people will use Microsoft 365 to address business challenges or achieve defined goals.

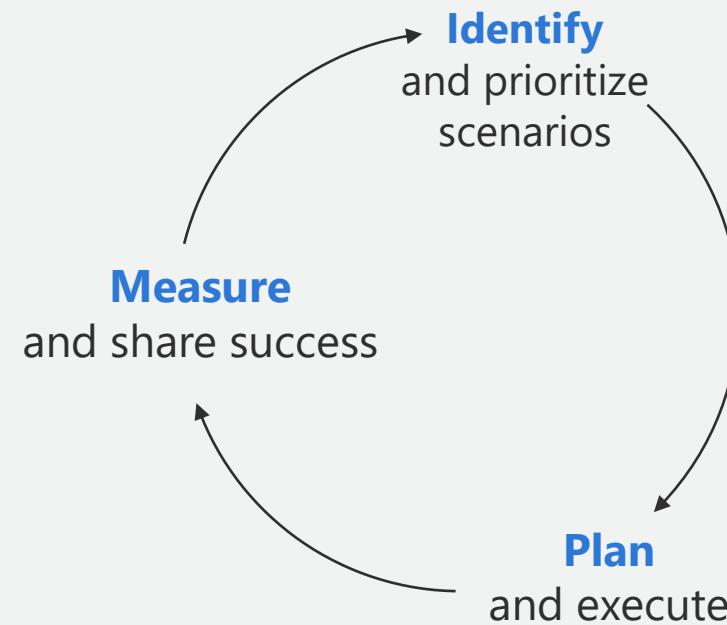
Deliver Value With a Structured Approach to Scenarios

Delivering Value

Get started with these easy wins

- Employee Engagement & Communication
- Bring Campaigns to Market Faster
- Increase Sales Productivity and Grow Revenue
- Streamline Business Reviews

Build on wins





Identify your Business Scenarios

Consider these questions to drive the conversation

Identify...

the important business objectives and challenges, and start to recognize areas of opportunity to improve work processes.

Host a workshop...

to delve deeper into current challenges, strategies, and goals. Include department leads, lines of business, IT, and other stakeholders who can help brainstorm how Microsoft 365 can be used in your organization.

Consider these questions to drive the conversation

- What are some of the organization's challenges or pain points related to communication and collaboration?
- What are the areas in which your organization would like to improve?
- What are the organization's strategic initiatives or current transformation projects that Microsoft 365 can support?
- What methods of communication and collaboration are typically better received by your organization than others?
- What is the process for drafting, distributing, and sharing information?

Microsoft 365 Productivity Library

Discover what's possible with Microsoft 365

The Microsoft 365 Productivity Library is a collection of recommended use cases to showcase ideas on how to use the products to your best advantage, in a way that's relevant to you.

The idea cards speak to everyday challenges you can solve with Microsoft 365 across industries and roles, and includes short training videos.

You can search the cards by Industry, Role or Product, or any keywords fitting your needs.

aka.ms/productivitylibrary

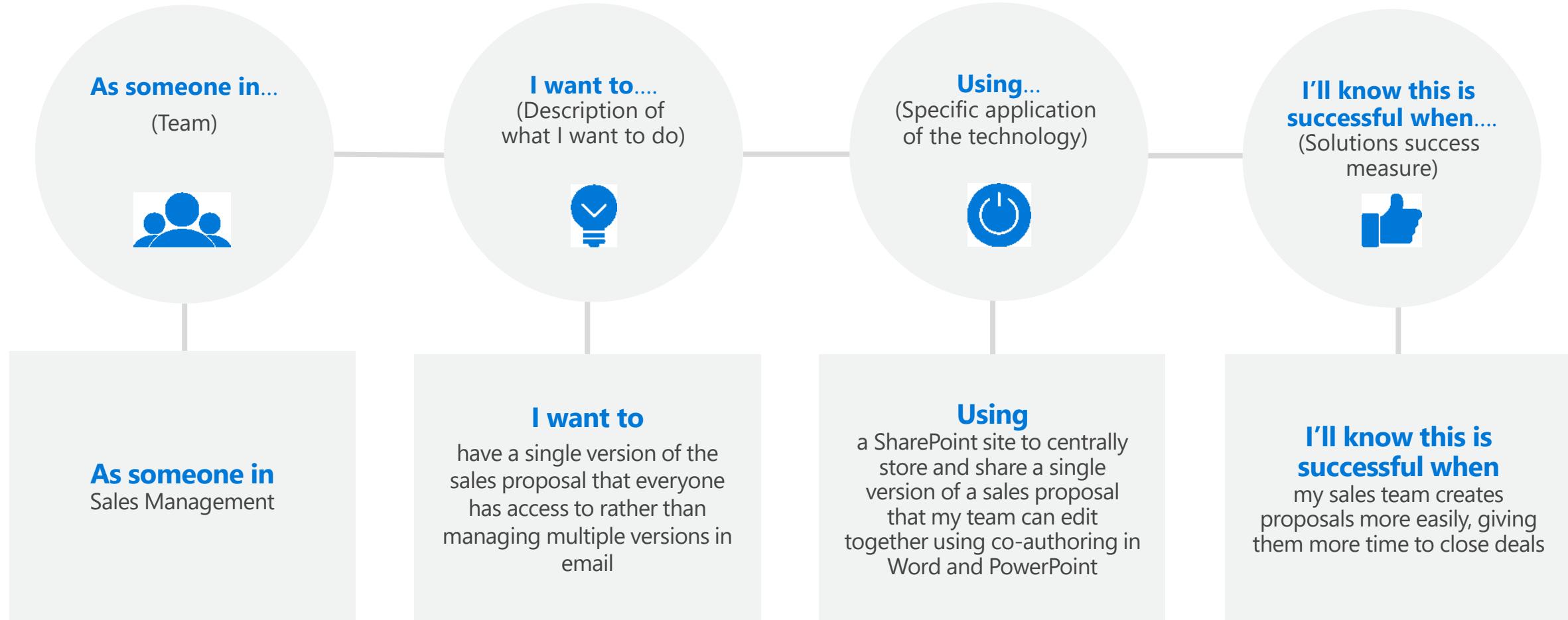
The screenshot shows the Microsoft 365 Productivity Library landing page. At the top, there's a banner with two people looking at a tablet. Below the banner, the text "Productivity Library" and "Discover what's possible with Microsoft 365" is displayed. To the right, there's a section titled "Explore examples of how we make work easier for you" with a search bar and a "Filter by: Industry, Roles or Products" dropdown. On the far right, there are four icons representing different roles: Finance (calculator), HR (person icon), Marketing (target icon), and Sales (chart icon). The main content area features a grid of 12 cards, each with a thumbnail image and a title. The cards are arranged in three rows of four. The titles include:

- Quickly identify and engage with in-house industry experts
- Ensure employees across hotel locations are on the same page
- Create and impress loyal customers by understanding their preferences
- Create impactful content together
- Close deals by engaging experts and executives in important customer discussions
- Monitor and communicate about business performance
- Find expertise and resources by using social networks
- Interview more candidates with greater efficiency
- Discover relevant content and people
- Predict student success by using customized reporting tools
- Access financial files quickly and securely from almost anywhere
- Understand customer preferences and predict requests
- Educate distributed sales representatives from anywhere



Not sure how to begin?

To help identify business scenarios, consider using the framework below

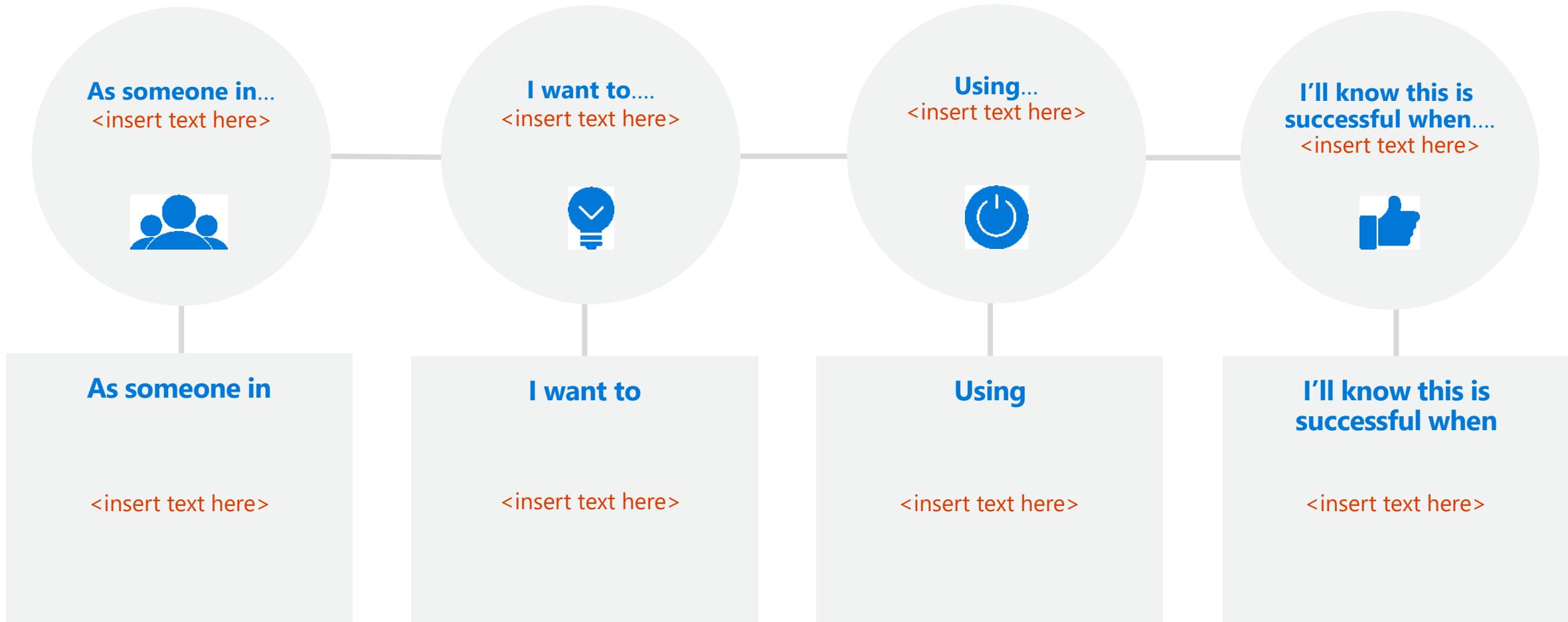




Fill this section out

Scenario One

Based on scenario discussions with stakeholders fill out the graphic below



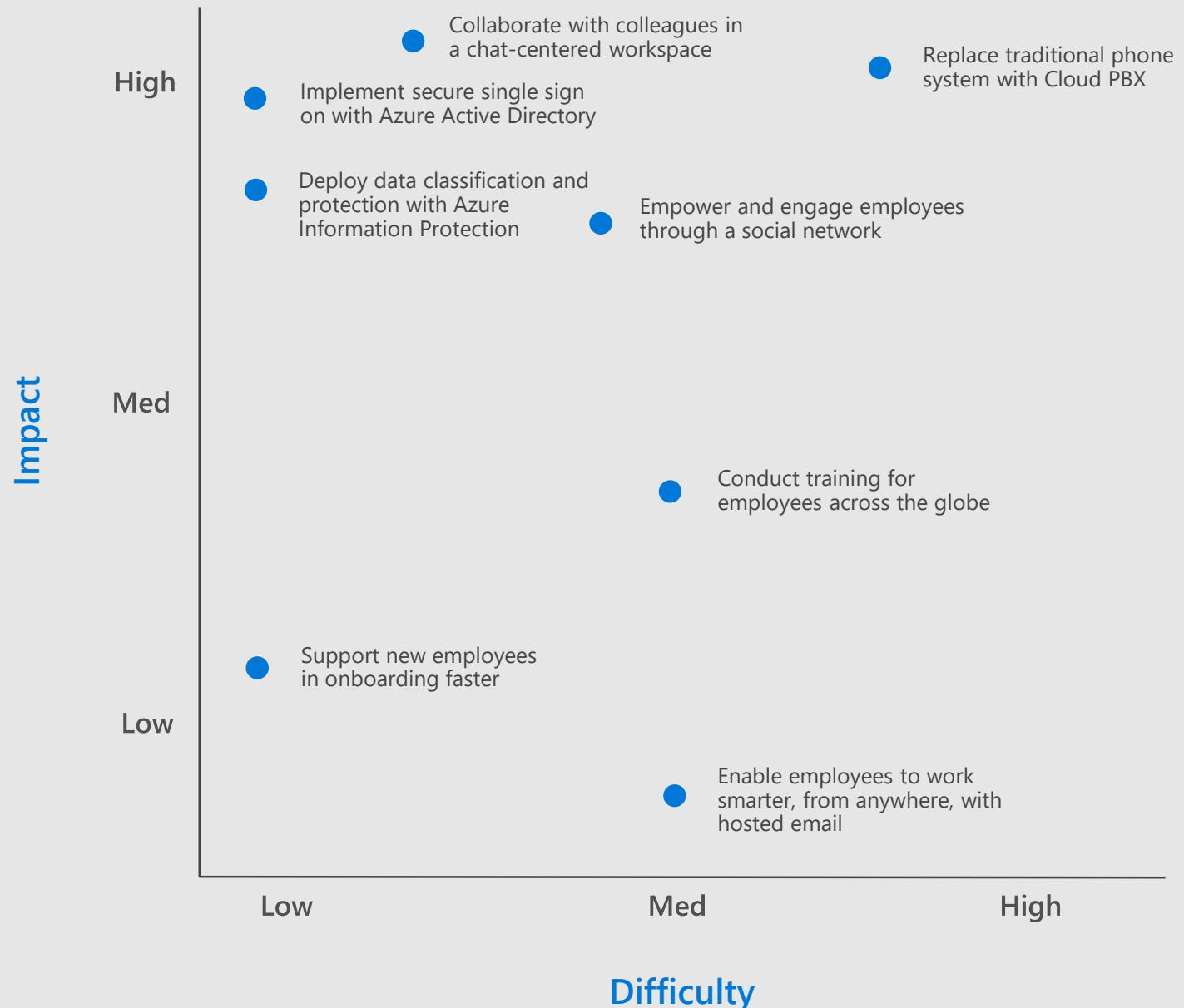


Prioritize Business Scenarios

Gauge impact and difficulty

It is important that you prioritize your Scenarios to ensure that you understand where to place your focus first.

Gauging impact and difficulty will help you understand which scenarios will provide the highest level of impact the fastest and which scenarios are harder projects that may require more planning.





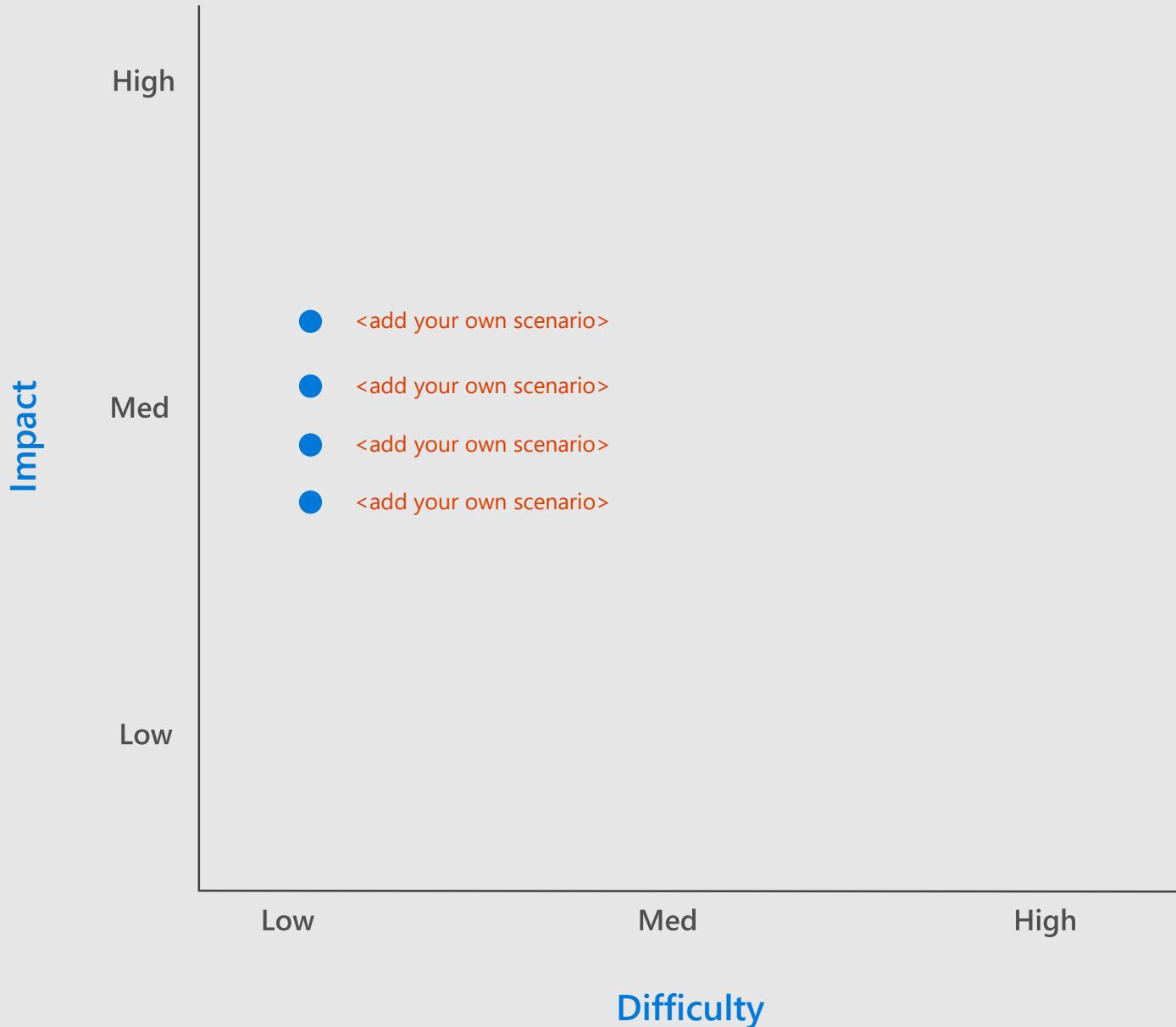
Fill this section out

Prioritize Business Scenarios

Gauge impact and difficulty

Use the graph to prioritize scenarios.

Drag the points around the graph to chart each scenarios impact and difficulty. Remember, this is different for every business, so take time to consider the resources and time required for each scenario.





Define Success Criteria

Use success criteria to measure Microsoft 365 roll-out impact

- Identify key performance indicators (KPIs) that may improve based on adopting various business scenarios
- Establish KPI benchmarks and users' Microsoft 365 knowledge
- Choose criteria to help you show leadership the impact Microsoft 365 is having on the organization
- Use the End-User surveys to measure satisfaction and progress against your benchmark. <http://aka.ms/usersurveys>



Define Success Criteria: Examples

Sample Success Criteria. Choose criteria to help you show leadership the impact of your Microsoft 365 implementation

Success criteria	Method	Example Goal
Reduced operating costs Increased adoption correlates to reduced third-party conferencing usage, travel time, and resource allocation	Quantitative Microsoft 365 reporting Finance/accounting reports Travel and phone expense reports	Comparison of pre- and post- Microsoft 365 reports will show cost savings. Post-roll-out usage of third party phone conferencing should show decreasing usage of 10% per month
Increased productivity Increased adoption correlates to faster communication and decision making, shorter time to complete tasks	Quantitative Process efficiency gains Qualitative End user surveys Yammer groups and feedback	Time to complete customer orders drop by 15% within 6 months
Improved collaboration Increased cross-team and cross location communications	Qualitative End user surveys	Increased usage of Microsoft Teams
Improved employee engagement Employees are fully absorbed by and enthusiastic about their work and so take further action to help the organization achieve its goals	Qualitative Employee surveys	Employee engagement improves by 15% within 6 months of rolling out Yammer



Fill this section out



Define Success Criteria

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

Success criteria	Method	Goal
Reduced operating costs <i><insert text in here></i>	Quantitative <i><insert text in here></i>	<i><insert text in here></i>
Increased productivity <i><insert text in here></i>	Quantitative <i><insert text in here></i>	<i><insert text in here></i>
	Qualitative <i><insert text in here></i>	
Improved collaboration <i><insert text in here></i>	Qualitative <i><insert text in here></i>	<i><insert text in here></i>
Improved employee engagement <i><insert text in here></i>	Qualitative <i><insert text in here></i>	<i><insert text in here></i>



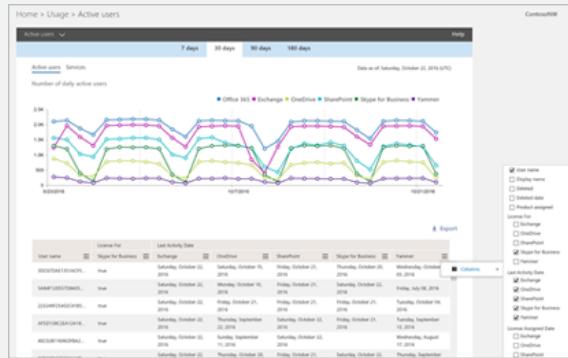
Monitor Adoption of Microsoft 365

Within the Microsoft 365 Admin Portal you'll find reports available to indicate your current user engagement levels for the different workloads.

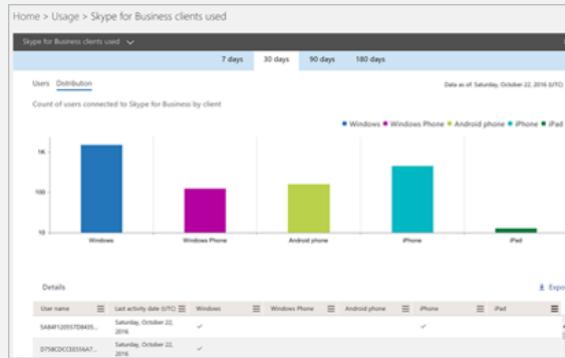
Record the usage metrics before your launch, that way you can see the effectiveness of your adoption activities.

Refer back to these reports to measure against your success criteria and identify areas for improving adoption.

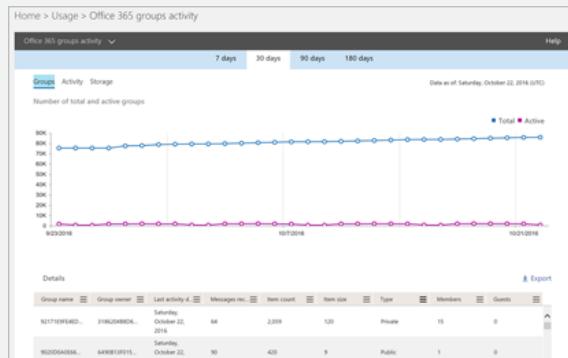
Active User Reports



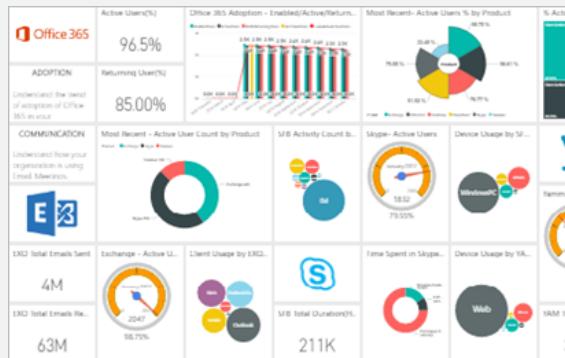
Skype for Business Clients Used



Office 365 Groups Activity



Microsoft 365 Adoption Content Pack



<https://aka.ms/o365adoptioncontentpack>

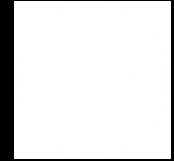


Share Success Stories

Success stories are often just as valuable as quantitative measures when demonstrating Microsoft 365 success.

Throughout the roll-out, project team members and champions should identify examples that demonstrate cross-functional collaboration and teamwork and share them by using Yammer

- **Time.** The story should begin with a time marker, so the audience knows when it happened.
- **Characters.** The story should feature names, so the audience knows who was involved.
- **Events.** The story should recount the events that took place.
- **Visuals.** The audience should be able to picture what has happened.



Awareness



Awareness

Communications

- Deploy a variety of tactics
- Focus on the “what’s in it for me?”
- Tailor plan to company and culture
- Send out communications

PRE-LAUNCH



LAUNCH

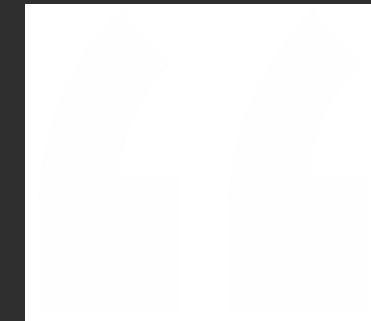


POST-LAUNCH



Engagement events

- Engage executive sponsors to kick-off event
- Staff events with IT and Champions
- Distribute banners and leaflets
- Place demo booths in cafeteria/foyer
- Host online events for remote offices



We knew we had to be crystal clear with employees about how Office 365 would make their lives easier and help them do their jobs better. So, we branded it as four things: Work Anywhere, Work Anytime You Like, Work Together, and Work on Any Device.

Joe Kamara

Lead Change Manager, Nec Group

nec group



Create a Communication Plan for Awareness

Use a communication plan to generate awareness and excitement before the launch and to keep people interested after launch.

- Ensure staff are taken into account when putting together the messaging, to help them identify "what's in it for me?"
- Pick a mix of activities including email, posters, and physical events, and plot them along the project timeline
- Schedule events where people can touch the products and ask questions
- Tailor activities for driving awareness to company and culture
- Having a leader send out a communication announcing Microsoft 365, kick off a launch event, or share the benefits during an all-hands meeting, will go a long way in validating its importance and getting everyone onboard with using the new technology

Posters, booklet and print



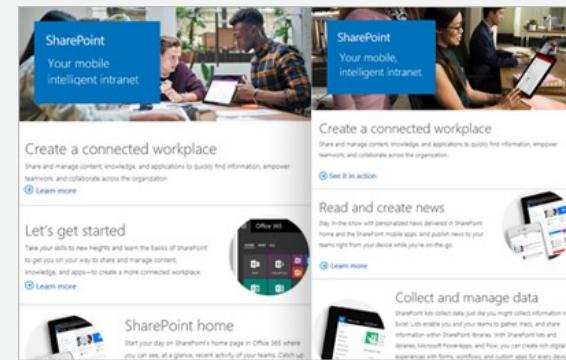
<https://aka.ms/AwarenessTemplates>

Countdown and Announcement emails



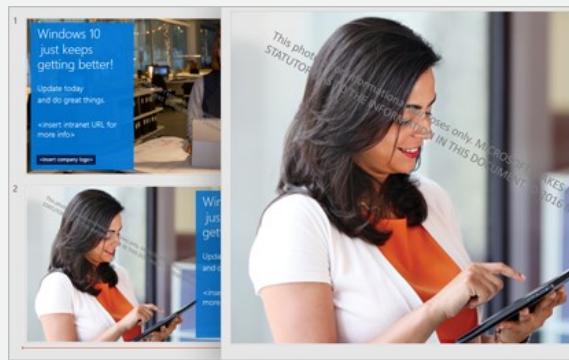
<https://aka.ms/AwarenessTemplates>

Tips and Tricks email series



<https://aka.ms/AwarenessTemplates>

Windows 10 Business Introduction Kit



<https://aka.ms/win10businesskit>



Consider Scenarios for Building Awareness Materials

Review scenarios and determine which ones can best be utilized for the organization's launch. Scenarios will help inform the communications plan.

- Translate the Core Scenarios into things that solve real business problems
- Decide which scenarios make sense for the company to promote in its Microsoft 365 launch
- Use the resources associated with each scenario to implement email announcements and training activities

Awareness Templates

The screenshot shows a Microsoft website with a blue header bar containing the Microsoft logo, 'FastTrack', 'About FastTrack', 'Microsoft 365', 'Azure', and 'Dynamics 365'. On the right side of the header is a 'Sign In' link and a user icon. Below the header, the word 'Resources' is centered above a section of text: 'The following resources are provided to help with onboarding, messaging, and support.' Underneath this text is a blue link labeled 'Download all resources'. The main content area is divided into three columns: 'Pre-launch', 'Launch', and 'Support'. Each column contains several resource links, each preceded by a small blue icon. The 'Pre-launch' column includes: 'Announcement template', 'Announcement Outlook template', 'Countdown template', 'Countdown Outlook template', 'Editable poster template', 'Flyer template', and 'Hi-Res Banner Poster'. The 'Launch' column includes: 'Tips & Tricks 1 - email template', 'Tips & Tricks 1 - Outlook template', 'Tips & Tricks 2 - email template', 'Tips & Tricks 2 - Outlook template', and 'Hi-Res Banner Poster'. The 'Support' column includes: 'Get it done from anywhere', 'Tips for working wherever you are', 'Tips to make teamwork seamless', 'Measuring Success Guide', and 'Sample user satisfaction surveys'.

<https://aka.ms/AwarenessTemplates>



Plan Launch Events

Resources and tactics for an effective launch

The following are some resources, ideas, and tactics to help create an effective Microsoft 365 launch:

- Planning Team and Champions wear Microsoft 365 t-shirts, order at <https://www.co-store.com/iw>
(US customers only)
- Microsoft 365 banners, posters, and leaflets displayed throughout the offices
- Demo booths in cafeteria/foyer to showcase the various Microsoft 365 tools and features, and to provide hands-on experience
- Run online engagement events using Skype Meeting Broadcast for team members in remote offices

How to choose your launch event:

- **Consider your goals for using Microsoft 365.** How can your launch event support these objectives and these particular parts of the business?
- **Consider your company culture.** What types of activities will resonate with your leadership and your employees?
- **Consider your time and resources.** Can you mix and match different event activities to plan something that suits your needs and fits into your schedule?
- **Consider existing company events.** Is there an upcoming company event near the roll-out of Microsoft 365 that could incorporate your launch?

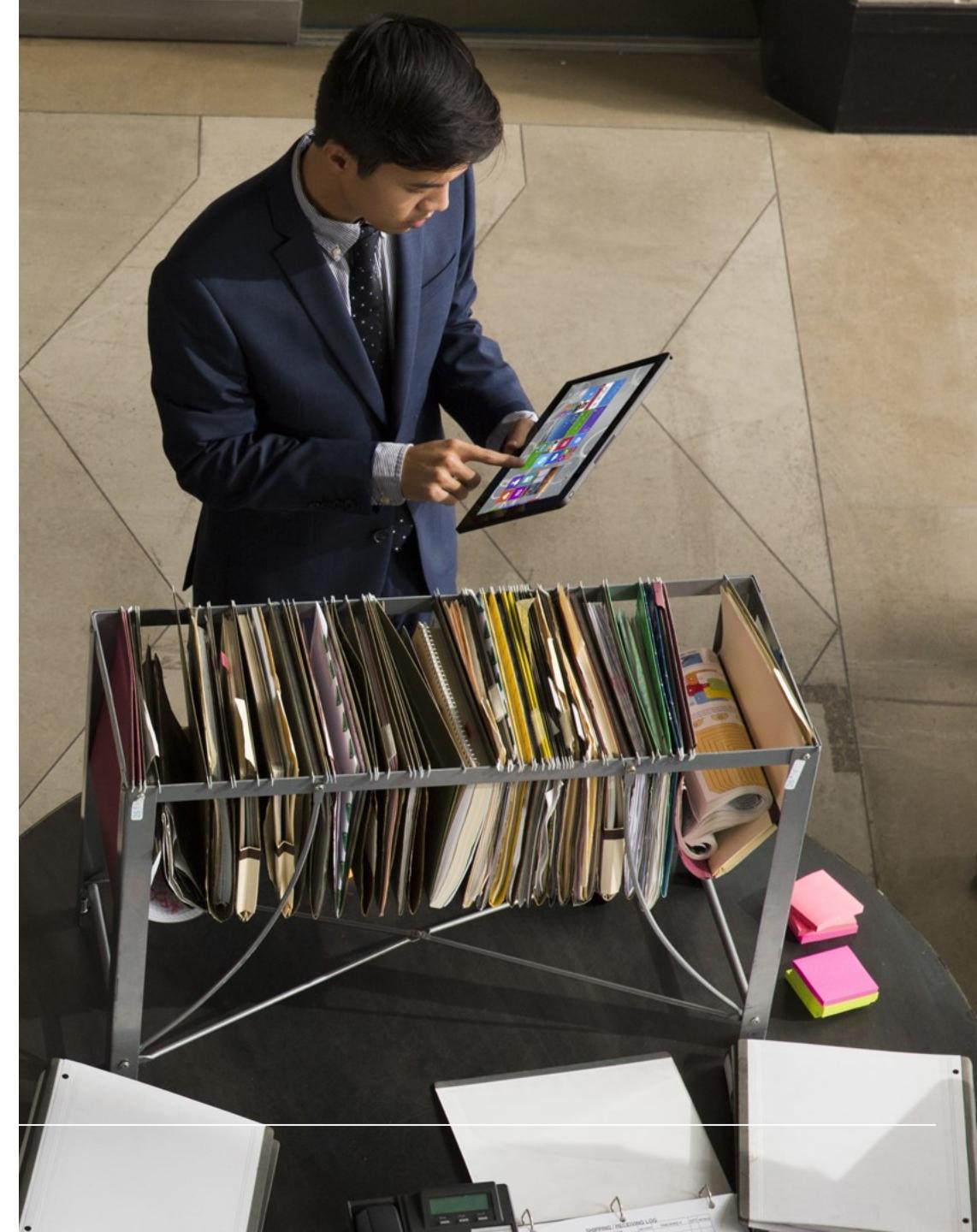
Encouraging Ongoing Engagement

Increase Microsoft 365 adoption over time with ongoing awareness and training activity.

- Leverage tips and tricks emails to reinforce skills development:
<https://productivitylibrary.fasttrack.microsoft.com>
- Create a Yammer group to continue conversation on best practices and new features
- Share success stories as to how people are using Microsoft 365 in innovative and impactful ways
- Periodically host additional engagement events like town hall meetings or lunch & learns to drive end user engagement
- Set challenges for people and run competitions to celebrate the best ways they've used Microsoft 365 to do work differently



Training



Training

Focus on the why

Make sure employees know why the change is happening, what's in it for them, and why they're being asked to change

Use real work scenarios

Use tasks, or business processes, that are familiar to your audience as a way to draw them into learning how to use the technology

Use multiple formats

Training end users should take on multiple forms to accommodate different learning styles, geographical barriers, and resource constraints

Reinforce

Make the training stick with reinforcement options like on-demand training, lunch and learn sessions, and new employee training options



To help with change management and adoption, we created corporate Office 365 training materials with a consistent approach to using the services that discouraged customization and kept complexity to a minimum. As a design principle, we use the default settings in Office 365 for at least six months.

Anders Munck

Enterprise Architect, Carlsberg





Training Best Practices

Get people up and running quickly!

A training plan is critical to your Microsoft 365 Roll out.

When you are putting together your training program, you will need to take into consideration:

The current productivity tools you are running

If you are currently running a productivity system, you may need to spend an increased effort in the training stage, as it will require a change in behavior

The technology literacy of the staff

You need to understand how tech-savvy your staff are when planning your training program. This will help to determine how easily they will pick up new ways in which to work

The current change programs

It is important to understand what other programs are currently running in the business to ensure that you are not overwhelming your staff and there isn't any confusion with the learning of new ways to work

Training preferences of your staff

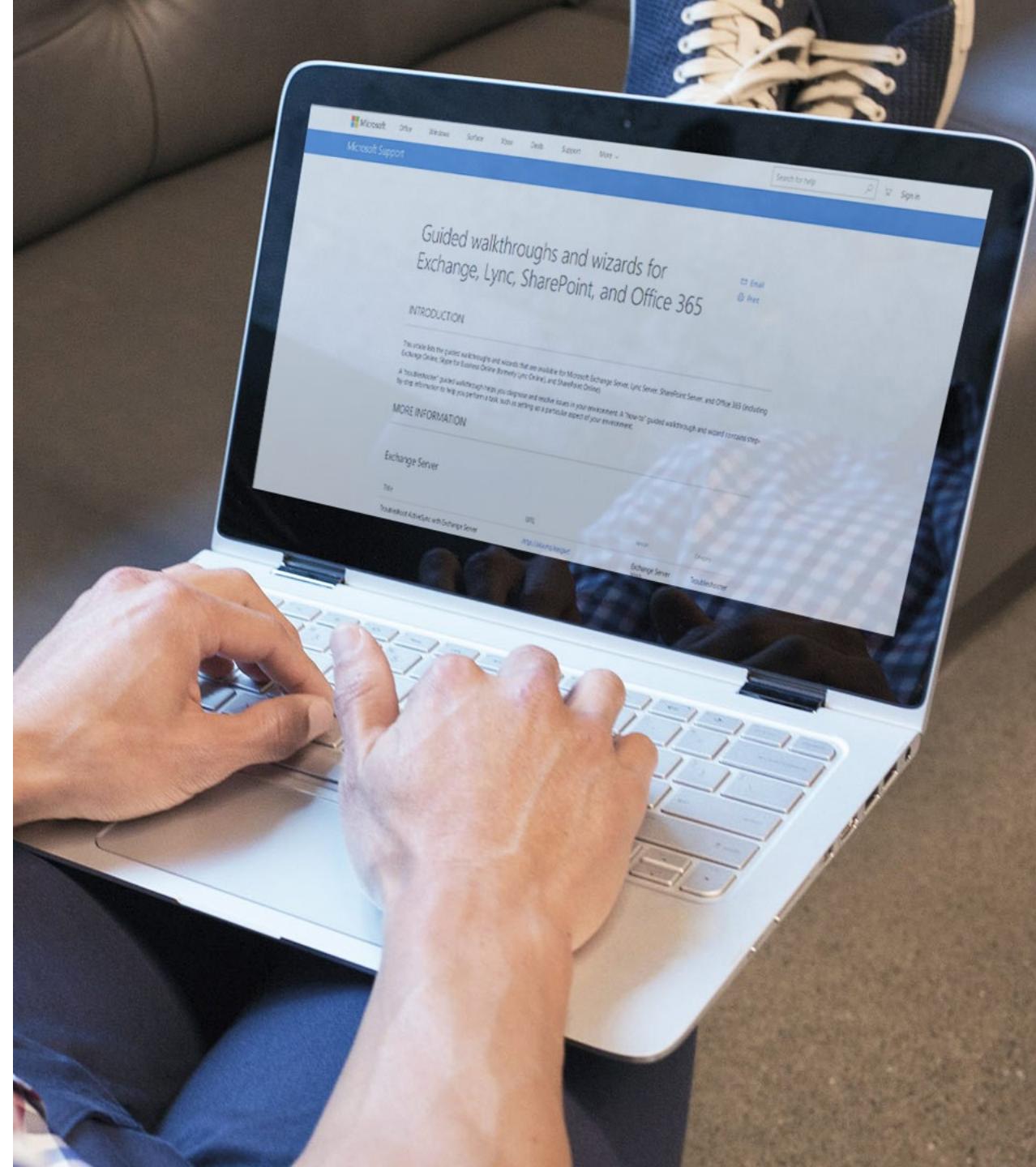
It is important to understand what is the best way to deliver specific training for your organization, whether it be through consumable micro-learning, in-person or through assisted or unassisted online tutorials

Help Desk Readiness

Make sure help desk is armed with the information they need to support your training.

Use this guide to help get your help desk ready to troubleshoot any Microsoft 365 issues or questions that your users may have.

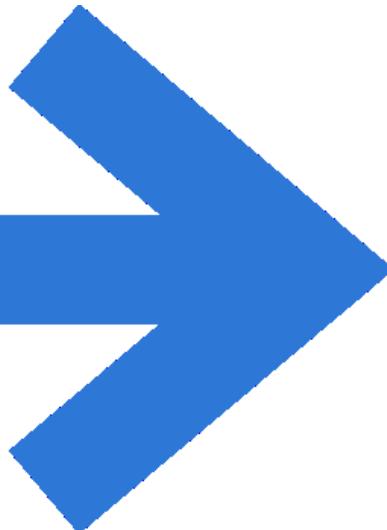
<http://aka.ms/helpdeskready>





Access Training Resources

Access free online training resources to help launch Microsoft 365.



Office 365 Training Center

Product based training to help ready people to use the services and apps effectively.

office.com/training

Windows 10 Quick Start Guides

Find guides and tutorials to help you familiarize your end users with the basic and advanced features and capabilities of Windows 10 in a business environment.

<https://aka.ms/win10quickstartguides>

Productivity Training

Scenario based training to ready people to maximize their productivity with Microsoft 365.

<http://aka.ms/productivitytraining>

Windows 10 How To: 5 Tips for Productivity

Customize your Windows 10 experience using apps, the Start menu, and more. Follow these five tips to do more with Windows 10.

<https://aka.ms/windows10productivitytips>

Plan Implement





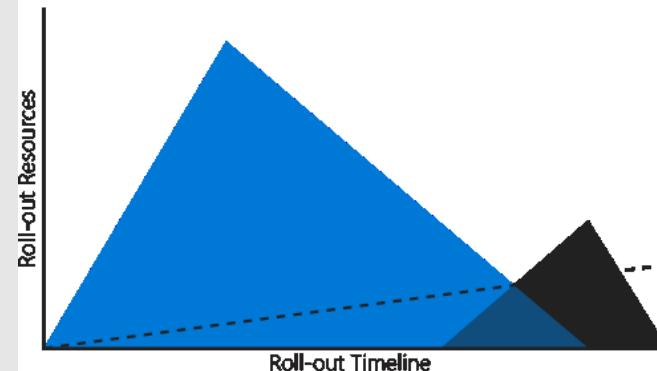
Plan Adoption Activities

When planning your adoption effort, it is important to have a view that extends past your initial launch.

Your end-users may be resistant to change, so post launch training and communications are critical steps to initiate in parallel with your technology deployment planning.

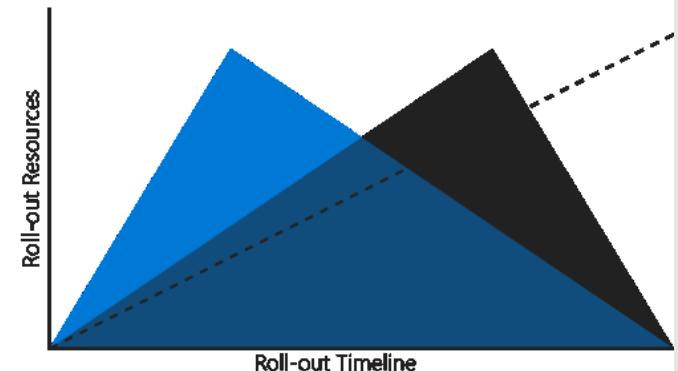
Common approach

End-user focus is an after-thought. For instance 'an email with a link to training'



Ideal approach

End-user adoption is a parallel, integrated work stream with deployment



Use Microsoft 365 to Plan and Execute Your Roll-out

Using various Microsoft 365 apps and services throughout the planning and execution of your roll-out can add to its success. You should consider doing this to get the team familiar with the service so they can effectively evangelize it to colleagues.

Some examples include:

- Use Microsoft Teams to plan your project and collaborate on documents related to your Microsoft 365 implementation
- Use Microsoft Planner for day-to-day task management of your Microsoft 365 implementation project
- Use Yammer to build, ready and support your Microsoft 365 Champions community
- Use Skype for Business to conduct online meetings with your project team, capturing meeting minutes in Microsoft OneNote



Pre-Launch

Use the Success Plan in the FastTrack portal to plan for the key milestones below. <https://fasttrack.microsoft.com>

Timeline	Workstream	Description
Week 1	Communications	Develop communications plan and event strategy. Prepare materials.
	Training	Plan end-user training program.
Week 2	Communications	Send a "Countdown email" to let employees know what's coming, set expectations, and spark interest by focusing on the "What's in it for me?"
	Early Adoption Program	Begin Early Adoption Program by recruiting and training program participants, and establishing an early adopter program Yammer group. Learn more with the Early Adoption Program Guide: https://aka.ms/earlyadoptionprogramguide To gather data about their knowledge of Microsoft 365, circulate a baseline survey shortly before users participating in your pilot receive activated accounts and devices.
	Support	Ready help desk to support end-users, and make sure they know about the Help Desk Troubleshooting Guide. http://aka.ms/helpdeskready
Week 3	Communications	Ensure that Microsoft 365 has a visual presence throughout offices with posters, flyers, and teaser videos.
	Training	Set up an internal team site to store training resources such as getting started guides and tips & tricks. Direct users to Microsoft's public learning center. See Office 365 Learning Center on: http://aka.ms/O365learning
	Early Adoption Program	Check in with Early Adoption Program participants for feedback. Release a survey halfway through the Early Adoption Program pilot to gather participant data about their experiences with Microsoft 365, and use the results to make any adjustments prior to a general roll-out.
Week 4-5	Communications	Work with internal communications to make announcements across company portal, IT portal, and other internal sites as needed. Just like with the Early Adoption Program group, distribute surveys to entire organization shortly before they receive their accounts and devices. Prepare for launch engagement event.
	Early Adoption Program	Use a final survey immediately after the pilot period to determine whether further adjustments to your general training and awareness materials are necessary.



Kickstart Early Adoption Program

Kickstart a successful launch by completing an Early Adoption Program. This will help you gain momentum for your launch and confidently go into your Microsoft 365 roll-out.

Running this program allows you to gather feedback on the user's launch experience and get early success stories that can be used when launching Microsoft 365 across your organization.

Completing an Early Adoption Program gives you an opportunity to test the waters with a trusted group who will be more flexible if anything goes wrong.



The Early Adoption Program Guide has even more tips and tricks for a successful Early Adoption Program.
<https://aka.ms/earlyadoptionprogramguide>



Include the Right Participants in the Early Adoption Program

Selecting the right people to participate in the Pilot Group for the Early Adoption Program is key to gain valuable insights to inform the organization wide launch. This list below are the type of employees to include in your program:

- Users from across different lines of the business and departments, preferably those that work together on a project or business process
- Likely Champions or leaders who will become advocates during the broad launch to the entire organization
- Users who typically struggle with technology. It's important to understand their needs and address these needs during the launch
- IT/help desk team members who will be supporting users during the launch
- Leave out the CEO and Upper Management. While it can be tempting to ask for the CEO's involvement, keeping them out of the Early Adoption Program provides an opportunity to smooth out any issues before they are exposed during the roll-out



Launch

Use the Success Plan in the FastTrack portal to plan for the key milestones below.

<https://fasttrack.microsoft.com>

Timeline	Workstream	Description
Week 6	Communications	Execute Microsoft 365 launch event to excite end users. Send out an "Announcement email" to let users know what's available, how to get started, and where to go to find help and resources.
	Training	Conduct end-user training

Post-Launch

Use the Success Plan in the FastTrack portal to plan for the key milestones below.

<https://fasttrack.microsoft.com>

Timeline	Workstream	Description
Week 8-12	Communications	Periodically share tips with end users by using the "Tips and Tricks email templates" to sustain momentum and broaden the use of Microsoft 365. After your organization-wide roll-out, circulate a final survey to assess end-user knowledge and experience with Microsoft 365.
	Training	Continue ongoing end-user training series as applicable

Microsoft 365 Roll-out Timeline

Workstream	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6 Launch
Identify Key Stakeholders and Assemble Team	Identify and recruit Success Owner and Project Manager	Identify and recruit Executive Sponsor(s), and fill remaining team roles				
Identify and Prioritize Scenarios	Identify and develop scenarios	Prioritize scenarios				
Define Success Criteria		Define success criteria/key performance indicators (KPI) and establish KPI benchmarks				
Create Success Plan	Begin capturing project details in a Success Plan at http://fasttrack.microsoft.com	Finalize Success Plan				
Build Champions Program	Identify and recruit Champions. Create Yammer Group to support Champions	Train Champions and brainstorm activities	Determine ongoing champion duties	Finalize champion launch activities	Get feedback and success stories from Champions to use in launch	
Early Adoption Program	Recruit program participants. Set up a Yammer group to make communication and feedback collection easy	Circulate a baseline survey to participants. Provide participants with activated account to formally begin Early Adoption Program	Check in with program participants to collect informal feedback		Send out a final survey and use any insights gathered to make adjustments to launch.	
Communication and Awareness	Develop communications plan and engagement event strategy. Develop communications materials using the available templates	Send a 'countdown email' to employees	Ensure that Microsoft 365 has a visual presence throughout corporate offices	Announce upcoming Microsoft 365 launch on company intranet. Prepare for launch engagement event.	Create a Yammer group for end users to share their Microsoft 365 success stories. Circulate a baseline survey to end users	Send an 'Announcement Email to let users know what's available. Execute launch engagement event.
Training	Develop end user training plan		Set up internal training site to store training resources		Train end users	Train end users
Support		Ready help desk to support end users				
Boost User Engagement and Drive Adoption						
Manage and prepare for change						
Measure, Share Success, and Iterate						

Microsoft 365 Roll-out Timeline

Workstream	Week 7	Week 8	Week 9	Week 10	Week 11	Week 12
Identify Key Stakeholders and Assemble Team						
Identify and Prioritize Scenarios						
Define Success Criteria						
Create Success Plan						
Build Champions Program		Get feedback from Champions and iterate program as necessary				
Early Adoption Program						
Communication and Awareness		Send "Tips and Tricks" email to end users		Send "Tips and Tricks" email to end users. Circulate a post-launch survey.		Send "Tips and Tricks" email to end users
Training	Setup ongoing training series					
Support						
Boost User Engagement and Drive Adoption	Prepare and run contests to continue encouraging user engagement Update and maintain internal training site Share success stories Periodically host additional engagement events					
Manage and prepare for change	Monitor the Public Roadmap and blogs Communicate to and ready end users for new feature releases					
Measure, Share Success, and Iterate	Collect and report on Microsoft 365 success criteria and Key Performance Indicators (KPIs) Capture and share success stories Roll-out new Scenarios					



We'll get you there with FastTrack

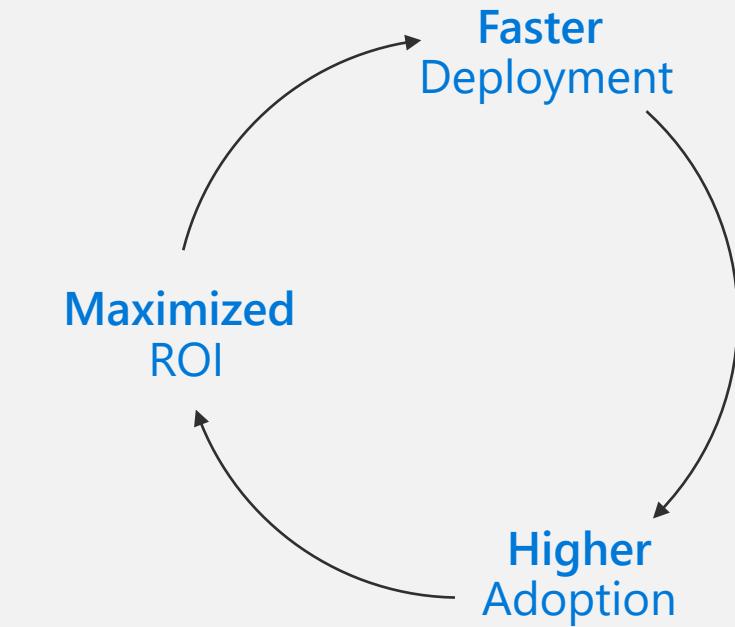
Our mission as a company—to help every individual and business on the planet achieve more—is not only about the products we create, but how we enable customers to get the most value out of those products.

We've designed FastTrack – our customer success service – to help businesses realize business value faster with the Microsoft Cloud. FastTrack can help you:

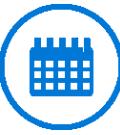
- Migrate email, content, and light up Microsoft 365 services – including assessment and remediation guidance to help prep your infrastructure for the cloud
- Deploy and securely manage devices including Microsoft 365 powered devices
- Enable your business and gain end-user adoption

FastTrack is an ongoing and repeatable benefit – available as part of your subscription – delivered by Microsoft engineers to help you move to the cloud at your own pace. FastTrack also provides you access to qualified partners for additional services, as needed.

With over 40,000 customers enabled to date, FastTrack helps maximize ROI, accelerate deployment, and increase adoption across your organization.



fasttrack.microsoft.com



Get Started

Plan for success

Leverage the adoption guide and email templates available on the FastTrack website to plan and execute adoption plan



<http://fasttrack.microsoft.com>

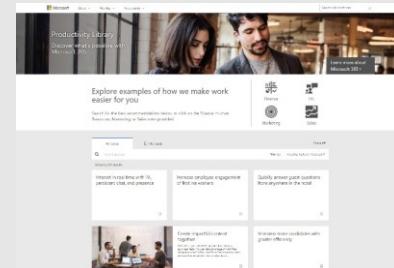


<https://aka.ms/adoptionguide>

- ➔ Prescriptive guidance
- ➔ Resource links
- ➔ Communication templates
- ➔ Best practices

Identify scenarios

Use the Productivity Library to see how Microsoft 365 is relevant to your business stakeholder's daily activities

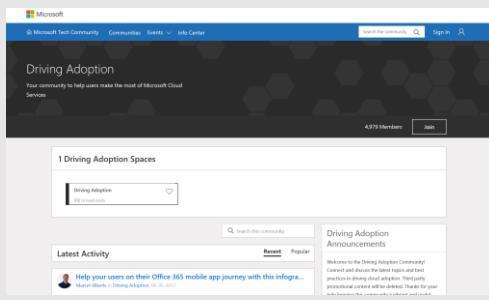


<http://aka.ms/productivitylibrary>

- ➔ Industry and role filters
- ➔ Launch email templates

Learn from peers

Talk to thousands of other Microsoft Customers on the Microsoft Technology Community to understand their best practices and insights



- ➔ Collaborate with Peers
- ➔ Build Relationships
- ➔ Access Additional User Resources
- ➔ Lean on Other's Experience

<http://aka.ms/driveadoption>

Train end users

Help ready people to use the services and apps effectively with training



- ➔ Article style and video training
- ➔ Product and scenario based

<http://office.com/training>

<https://aka.ms/win10quickstartguides>

<https://aka.ms/windows10productivitytips>