



Sample Adoption Plans and Timelines

Microsoft 365 Adoption Guide | Supplemental Resources

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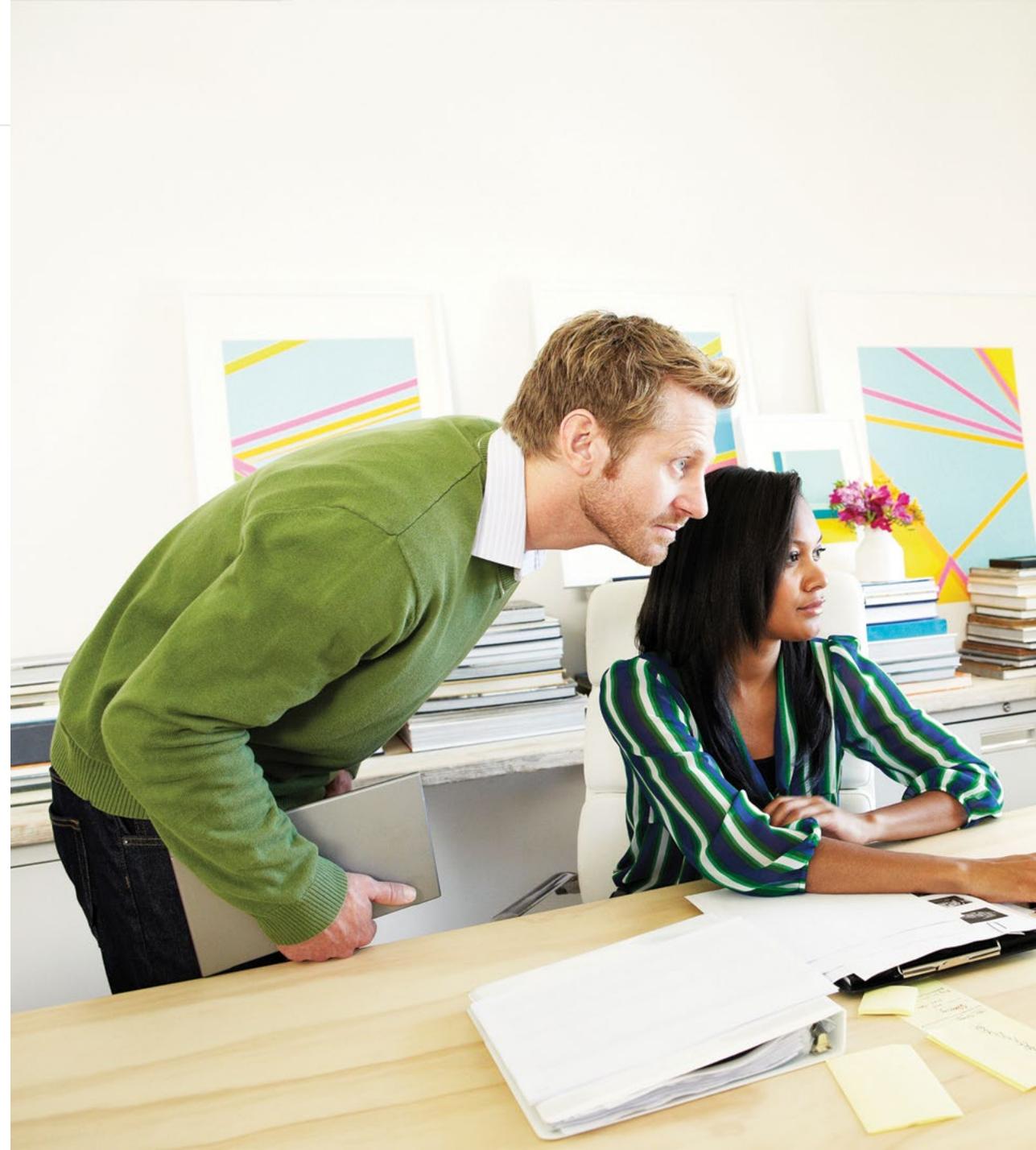
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Use Microsoft 365 to plan and execute your rollout

Using various Microsoft 365 apps and services throughout the planning and execution of your rollout can add to its success. 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 implementation
- Use Microsoft Planner for day-to-day task management
- 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



Microsoft 365 rollout timeline sample

| 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 or Teams 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 Adopter Program | Recruit program participants. Set up a Yammer or Teams group to make communication and feedback collection easy | Circulate a baseline survey to participants. Provide participants with activated account to formally begin Early Adopter 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 communication plan and engagement event strategy. Develop communication 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 or Teams 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 | | | | | | |

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

Microsoft 365 rollout timeline sample

| 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 Adopter 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 | | | | | |

Adoption & deployment workstreams

Scope and Outcomes for workstreams (1 of 2)

| Workstream | Outcome | Core Deliverables | Scope & Notes |
|---|---|--|--|
| Service Strategy & Project Plan Stakeholder Mapping & Alignments | Phase-driven deployment and Adoption Plan with identified owners, dates & risks/issues as needed | Collaboration Improvement Plan Sprint over sprint execution to goal Decision Log, Risks & Issues List Regular planning & alignment meetings | Core collaboration improvement team for initial phase (Strategy, Champion & Early Adopter phases) May increase team size as project expands |
| Program Communications & Success Stories | Stakeholders, user communities and program participants have frequent insight into progress and success examples | Project news and reporting assets | |
| Champion Program | Increased digital literacy; reduced change fatigue; increased solution adoption; talent identification; transition support | Monthly Champion training ROB Collation of themes and issues for support, training and program leads Owner of enthusiasm | Monthly Champion calls – 1 hour; Leads with others optional attendance at public O365 Champions Community calls with Microsoft – 1 hour |
| Support Readiness | Incident support and resolution Management of issue escalation | Onboarding – 8 hours | Early training with Champions Onboarding to feedback channels Monthly review of issues/trends within Service Health Review |
| Early Adopters & Feedback | Provide hands-on insights of solution in target environment. Develop feedback methods that scale. Identify champion candidates & high- value business process improvements. | Employee engagement; interactive onboarding sessions & design/deployment & analysis of feedback channel | |
| Governance & Security | Guide governance and policy decisions for experience. Complete required configuration. Support training & communications on same. | | |

Adoption & deployment workstreams

Scope and outcomes for workstreams (2 of 2)

| Workstream | Outcome | Core Deliverables | Scope & Notes |
|---|---|--|--|
| Technical Readiness & Alignment | Technical implementation of service ensuring quality and availability. Definition of technical projects that deliver the overall strategy & business value. | Service quality, enablement, and management processes and insights | |
| Metrics & Reporting | Provide on-demand reporting of meaningful business and service metrics to ensure defined outcome. | | |
| Business Process Mapping | Define high-level scenarios for improvement based on user interviews, team focus groups and observation. | Deliver impact to difficulty ranking for ongoing prioritization of effort. | |
| Awareness Campaign | Create awareness and enthusiasm for digital transformation and business initiatives. | Key messages and creative assets used to inform users of transition and outcomes | |
| Training Program | Create digital literacy and operational efficiency. Reduce change fatigue. | Provide on-demand and instructor led-interactive onboarding to new solution | |
| Service Health Reviews & Improvement Planning | Provide actionable insights and prioritization for improvement in the experience. | Data and analysis for monthly review on service incidents, support themes, training effectiveness, experience quality, overall adoption and user sentiment | Joint effort between IT, user adoption specialists and key experience stakeholders. Informs overall experience strategy. |

Adoption & deployment workstreams

Best Practice: Identify leaders for each workstream area or integrate outcomes into existing project plans

| Workstream | Lead | Weekly ROB & Notes |
|---|------|--|
| Service Strategy & Project Plan | | PMO - Full Team All UP - Weekly 30 minutes & monthly Planning - 1 hour |
| Stakeholder Mapping & Alignments | | |
| Program communications & success stories | | |
| Champion Program | | Monthly champion calls – 1 hour; Leads with others optional attendance at public Champion Community calls with Microsoft – 1 hour |
| Support Readiness | | Early training with Champions Onboarding to feedback channels Monthly review of issues/trends within Service Health Review |
| Early Adopters & Feedback | | Monthly review of issues/trends within Service Health Review |
| Governance & Security | | |
| Technical Readiness & Alignment | | Weekly - alignment across technology deployment projects |
| Metrics & Reporting | | |
| Business Process Mapping | | |
| Awareness Campaign | | |
| Training Program | | |
| Service Health Reviews (ongoing improvements) | | Health, usage, support trends, backlog prioritization and retrospectives for deployment, adoption and management of service. (Joint b/t adoption & IT teams) |

Adoption & deployment tools

Best Practice: Complete worksheets and/or implement tools in support of workstream outcomes

| Workstream | Core Tool(s) | Notes |
|---|---|--|
| Service Strategy & Project Plan Stakeholder Mapping & Alignments | Collaboration Service Team Connected Employee Strategy Doc Enterprise Project Plan Stakeholder Map | Use team template to plan and manage O365. Use PPT of Exec Summary to broadly communicate strategy. Change branded name as needed. Download tools from https://aka.ms/AdoptionTools |
| Program communications & success stories | Connected Employee Team & Site News Hub on SPO Site Success Stories Form, Flow and List | Configure new hub Incorporate Early Adopter feedback channels |
| Champion Program | Teamwork Champion Team | |
| Support Readiness | Service FAQ & Known Issues Lists | |
| Early Adopters & Feedback | Early Adopter Program guide | |
| Governance & Security | Service Check List | |
| Technical Readiness & Alignment | TR Checklist from FastTrack by Service | |
| Metrics & reporting | O365 Adoption Content Pack Outcomes matrix | Outcomes matrix capture sheet (XLS) |
| Business Process Mapping | Scenario Mapping slides Scenario Data Capture List (XLS) | Move to Excel sheet or Form for easy reporting |
| Awareness Campaign | Day One Kit Customer Success Kit | |
| Training Program | Custom Learning for Microsoft 365 site & webpart | Configure custom playlists for internal content and policies |
| Service Health Reviews (ongoing improvements) | SHR Meeting Template | |

Adoption & deployment tools

Best Practice: Complete worksheets and/or implement tools in support of workstream outcomes

| Team or Site Name | Proposed Channels | Notes |
|---|---|--|
| Get to know Teams | General Say Hi How do I? Feedback Ideas for future teams Support | Create your first Teams article |
| Microsoft 365 Service Management | General Awareness and Adoption Business Engagement Early Adopter Program Feedback and Insights Security and Compliance Strategy and Planning Service Health and Incidents SVC – OneDrive SVC – Teams (and Skype if needed) SVC – SharePoint etc.. Training Watercooler Chat | Use team template to plan and manage Microsoft 365 |
| Connected Employee Initiative Program communications & success stories | Connected Employee Team & Site News Hub on SPO Site Success Stories Form, Flow and List Opt-in form for Early Adopter Community | Configure News Hub on main Connected Employee Incorporates Early Adopter feedback channels |
| Teamwork Champions | General Best Practices, Training and How To Champion Corner Program Leads Social Hub | Core onboarding notebook and reports Training documents and link to training site Q&A & champion conversation hub Program planning Connectors to Teams, SharePoint & Planner Blogs & Twitter feeds |

How do Champions fit into overall launch planning?

Adoption Approach



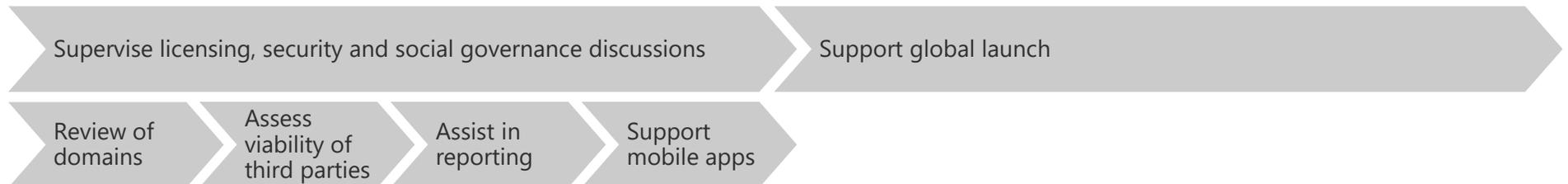
Business scenarios



Communications and training



IT and social governance



Organize and develop a Champions Community

Communications and training



- Set the context and scope of the community: what, why and how.
- Design and align your Champion strategy to organizational goals and Microsoft 365 vision, and ensure you include a community to engage and support the Champions.
- Attain sponsorship from key stakeholders and executives.
- Develop your overall coverage plan, for example, the number of Champions per office, department, team, floor, etc.
- Develop your champion commitment guide.

Meet with your stakeholders and Champions

Communications and training



- Gain an understanding of who your stakeholders are - the Champions, organizational influencers, team leaders, Executive Sponsors, etc.
- Articulate the value of the Champions Community to the organization to secure support from key stakeholders.
- Work with these stakeholders to develop and approve the final design of the Champions Community.
- Inform Champions of what their involvement entails plus the time commitment required.

Identify your Champions

Communications and training



- Have discussions with department leads and managers across different business teams to help locate thought leaders, technology evangelists, etc., so you can identify ideal Champion candidates.
- Utilize your Microsoft 365 support group, or Yammer or Teams network if you have one, to identify who is already helping new Microsoft 365 users and has potential to grow as a Champion

Execute the Champions Community plan

Communications and training



- Having gone through the motions of planning, this stage is about actually executing on your plan.
- Continuously meet with Champions to learn how they're doing and gather feedback about how their teams are finding new ways of working.
- Throughout your organization-wide launch, encourage interested employees to learn more about the Champions Community and provide them with guidance about how to get involved.

Involve Champions in the Microsoft 365 launch

Communications and training



- Communicate the purpose and strategy of the Champions Community as part of your organization-wide launch.
- Announce where Champions can be reached and how employees can learn from them through online and offline communications around the Microsoft 365 launch.
- Provide Champions with a fact sheet to provide to their manager to attain buy-in.
- Give something back. Recognize the work that Champions are doing through public recognition and awards.

Highlight and share success

Business scenarios

Microsoft 365 Early Adopter Program with Champions

Identify and launch additional solutions

Highlight and share success

- Drive awareness among Champions that highlighting and sharing Microsoft 365 success is a part of their role. Ensure they understand how sharing success will support them in their discussions with new users by incorporating it into any Champion training.
- Ensure there is an open space for Champions to connect with one another, such as a Yammer or Teams group, where they can highlight these success stories and have discussions around feedback.

Align to technical timeline



ONBOARDING

INITIATE

- Start onboarding process with FastTrack
- Review your goals and plans to drive business buy-in

ASSESS

- FastTrack will provide assessment, guidance and troubleshooting tools for Active Directory and Network
- FastTrack will share best practices and resources to plan launch and end-user adoption

REMEDiate

- Complete your remediation tasks to meet requirements for onboarding, adopting and migrating each service
- FastTrack will review the outcomes of the remediation activities with you to ensure you are ready to proceed

ENABLE

- FastTrack will provide guidance to:
 - enable tenant setup, network configuration, and DNS configuration
 - setup account, online or federated
 - enable Exchange Online, Skype for Business, OneDrive for Business, SharePoint Online, Yammer Enterprise, Microsoft 365 ProPlus and Microsoft Teams
- Complete your service onboarding, plus tenant and identity integration

MIGRATION

- FastTrack will provide mail migration services* to Exchange Online
- FastTrack will provide file migration services* to SharePoint Online or OneDrive for Business

ADOPTION

- Identify stakeholders, identify and prioritize scenarios, create success plan (inclusive of communication and training plans)
- Early Adopter Program: planning, communications and deployment, and survey and measure
- Execute success plan: Champions program, communications, training and help desk readiness
- Boost user engagement and adoption, manage and prepare for change, measure, share success and iterate

* FastTrack mail and migration services are available to eligible customers
Visit <https://aka.ms/fasttrackdatamigration> for more information

