



Early Adopter Program Guide

Microsoft 365 Adoption Guide | Supplemental Resources

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WHAT IS AN EARLY ADOPTER PROGRAM?

An Early Adopter Program gives your organization early insights and learnings that will help you bring Microsoft 365 to life for all users. Think of it as a dry run of your organization-wide rollout, amongst a representative group of your users, that will help prepare you for the full scale launch. It is an opportunity to test your ideas and understanding with a group of end users who, with their constructive feedback and insights, will help the project team bring that “WOW” factor to the full launch across your organization.

WHAT AN EAP IS NOT:

A referendum on whether Microsoft 365 is deployed, or user acceptance program. As your organization has committed to Microsoft 365 the focus in the EAP should be about making the rollout of Microsoft 365 in your organization successful. An EAP is entirely about making the rollout of Microsoft 365 go more smoothly for everyone.



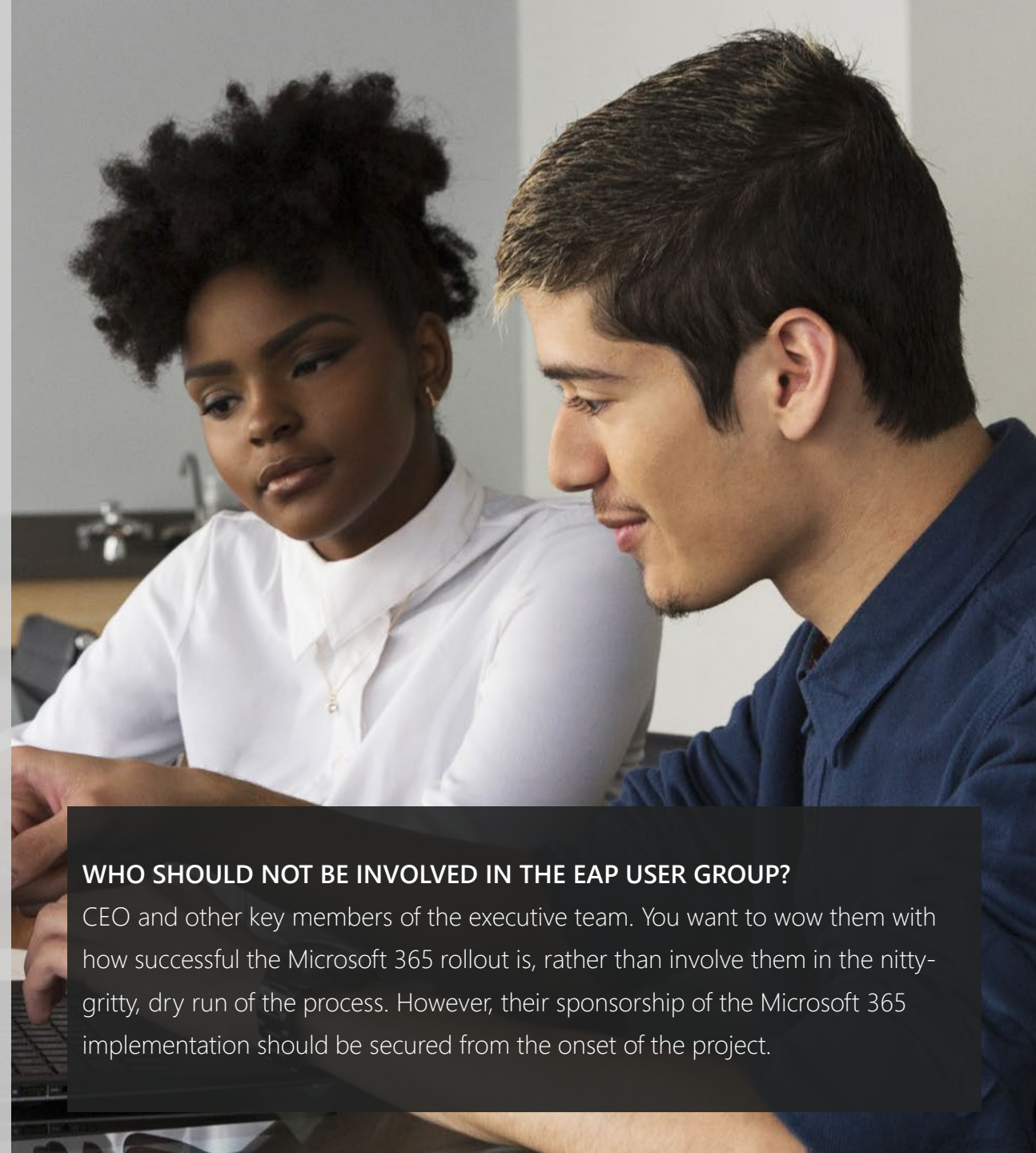
WHY DO AN EAP?

- Gather initial feedback and identify potential stumbling blocks to help shape your final launch plan
- Get feedback from users on the identified goals and scenarios for your Microsoft 365 implementation
- Solve any potential problems with a much smaller group of users, prior to an organization wide launch
- Develop a pool of potential Microsoft 365 Champions to recruit from, who will help evangelize and help colleagues adopt Microsoft 365 once the full rollout takes place



WHO SHOULD BE INVOLVED IN THE EAP USER GROUP?

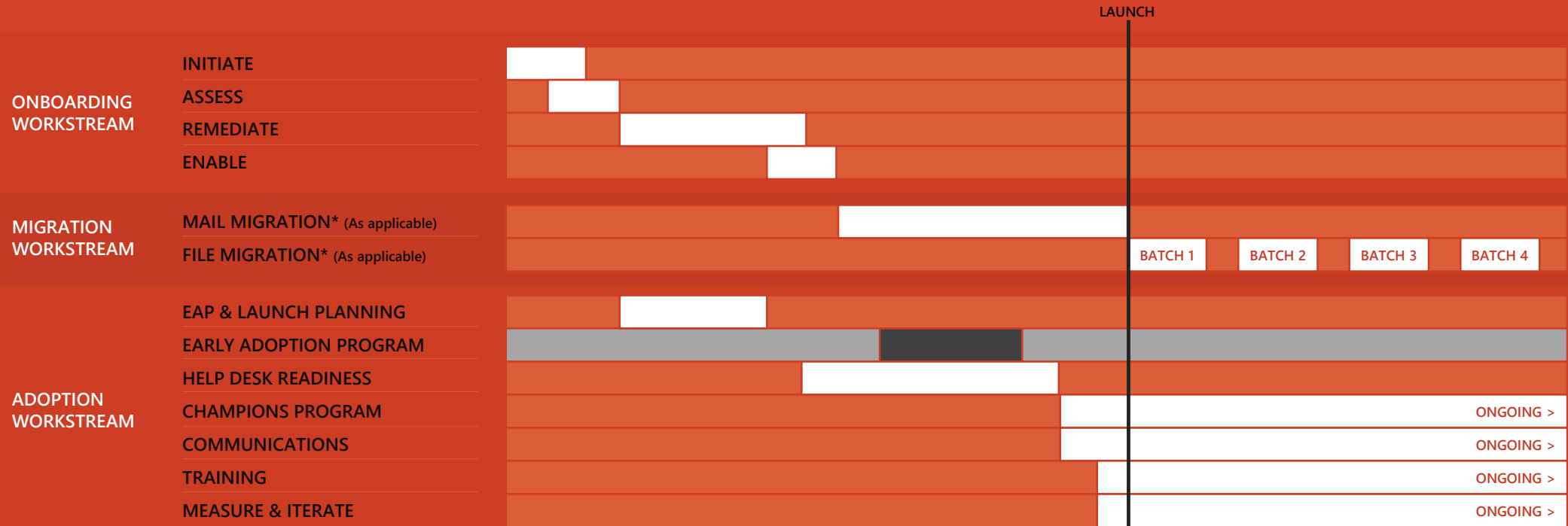
- People who want the project to be successful. Your program participants are important influencers and they will share with their colleagues the experience they have with the rollout. They will need to be willing to spend the time in training and in providing feedback to allow the EAP to achieve its goals.
- Users from across different lines of business and departments, preferably those that work together on a project or business processes.
- Users who are likely to be involved in the Microsoft 365 Champions Program. Leveraging your Microsoft 365 Champions within your organization is an important stakeholder group. They are knowledgeable, committed to furthering their expertise and willing to provide peer coaching and assistance.
- Leaders who will become advocates during the broad launch to the entire organization.
- Users who typically struggle with technology. It's important you understand their needs and address these needs during the launch.
- IT/help desk team members who will be supporting users during the pilot and post-launch.



WHO SHOULD NOT BE INVOLVED IN THE EAP USER GROUP?

CEO and other key members of the executive team. You want to wow them with how successful the Microsoft 365 rollout is, rather than involve them in the nitty-gritty, dry run of the process. However, their sponsorship of the Microsoft 365 implementation should be secured from the onset of the project.

MICROSOFT 365 PROJECT PLAN



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
 - to setup account, online or federated
 - to 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

PRE EAP



ACTIVITIES

Early Adopter Program Planning

These planning activities can happen during the technical onboarding as a parallel workstream. Customize the EAP plan template to suit your organization's needs and include assigning timelines to the plan.

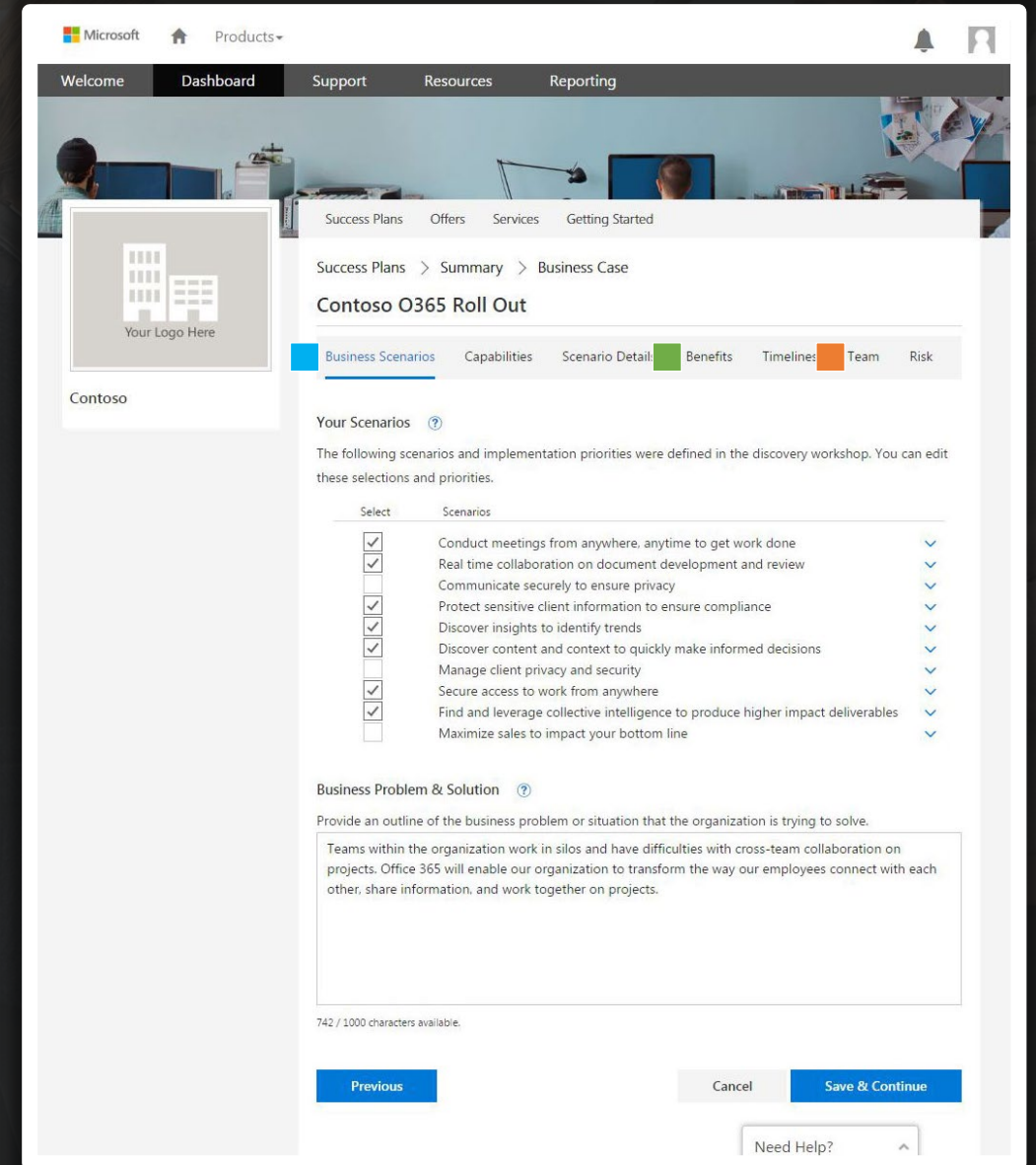
Capture these elements in your Success Plan on FastTrack:

- Communications Plan
- Training Plan
- Success Criteria

How to create your Success Plan:

1. Log into the FastTrack site (www.microsoft.com/en-us/fasttrack/) using your Microsoft 365 login credentials
2. Click "Start a new plan" to get going on your Success Plan
3. Click the "Business Case" tile on the Success Plan home page
4. Select Business Scenarios
5. Enter Success Criteria under "Benefits"
6. Add project stakeholders to the plan on the "Team" tab

RESOURCES



The screenshot shows the Microsoft FastTrack Success Plan interface. The top navigation bar includes 'Welcome', 'Dashboard', 'Support', 'Resources', and 'Reporting'. The main content area is titled 'Contoso O365 Roll Out' and features a 'Business Scenarios' tab. A table lists various scenarios with checkboxes for selection and dropdown arrows for details. Below the table is a 'Business Problem & Solution' section with a text input field and a character count of 742 / 1000. At the bottom, there are 'Previous', 'Cancel', and 'Save & Continue' buttons, along with a 'Need Help?' link.

Microsoft Products

Welcome Dashboard Support Resources Reporting

Success Plans Offers Services Getting Started

Success Plans > Summary > Business Case

Contoso O365 Roll Out

Business Scenarios Capabilities Scenario Detail Benefits Timelines Team Risk

Your Scenarios ?

The following scenarios and implementation priorities were defined in the discovery workshop. You can edit these selections and priorities.

Select	Scenarios
<input checked="" type="checkbox"/>	Conduct meetings from anywhere, anytime to get work done
<input checked="" type="checkbox"/>	Real time collaboration on document development and review
<input type="checkbox"/>	Communicate securely to ensure privacy
<input checked="" type="checkbox"/>	Protect sensitive client information to ensure compliance
<input checked="" type="checkbox"/>	Discover insights to identify trends
<input checked="" type="checkbox"/>	Discover content and context to quickly make informed decisions
<input type="checkbox"/>	Manage client privacy and security
<input checked="" type="checkbox"/>	Secure access to work from anywhere
<input checked="" type="checkbox"/>	Find and leverage collective intelligence to produce higher impact deliverables
<input type="checkbox"/>	Maximize sales to impact your bottom line

Business Problem & Solution ?

Provide an outline of the business problem or situation that the organization is trying to solve.

Teams within the organization work in silos and have difficulties with cross-team collaboration on projects. Office 365 will enable our organization to transform the way our employees connect with each other, share information, and work together on projects.

742 / 1000 characters available.

Previous Cancel Save & Continue

Need Help?

CONFIRM TECHNICAL PRE-REQUISITES ARE ESTABLISHED

The following technical tasks are important to running a smooth EAP. They should all be completed during the technical onboarding workstream, with guidance from FastTrack.¹

→ <https://fasttrack.microsoft.com>

If some of these technical pre-requisites can't be adequately completed, request assistance from FastTrack* to provide your IT team guidance on how to successfully execute these necessary technical tasks.

* To get help through the FastTrack site, sign in using your Microsoft 365 credentials, click Services and complete the Request Assistance for Microsoft 365 form.

Note: If you have a partner listed in your Microsoft 365 tenant, you won't see this option. Please consult your partner for assistance.

TECHNICAL PRE-REQUISITES

- Download the [IdFix DirSync Error Remediation Tool](#) to perform discovery and remediation of identity objects and their attributes in an Active Directory environment in preparation for Scenario
 - [Install and setup ADFS for Single Sign-on](#)
 - [Install AD Connect for a Hybrid Configuration](#)
- Setup O365 tenant
- [Make sure Firewall Ports for ADFS are configured](#)
- [Have your mail flow configured](#)
- [Make sure mail flow is tested](#)
- [Make sure DNS records are created](#)

Note: If you are on legacy Exchange servers (before 2010) then you need minimum one Exchange 2013 to make your environment hybrid.

¹ Microsoft FastTrack is available for customers with 50+ licenses of an eligible Microsoft 365 plan.

See <https://aka.ms/fasttrackdatamigration> for more information on eligibility criteria

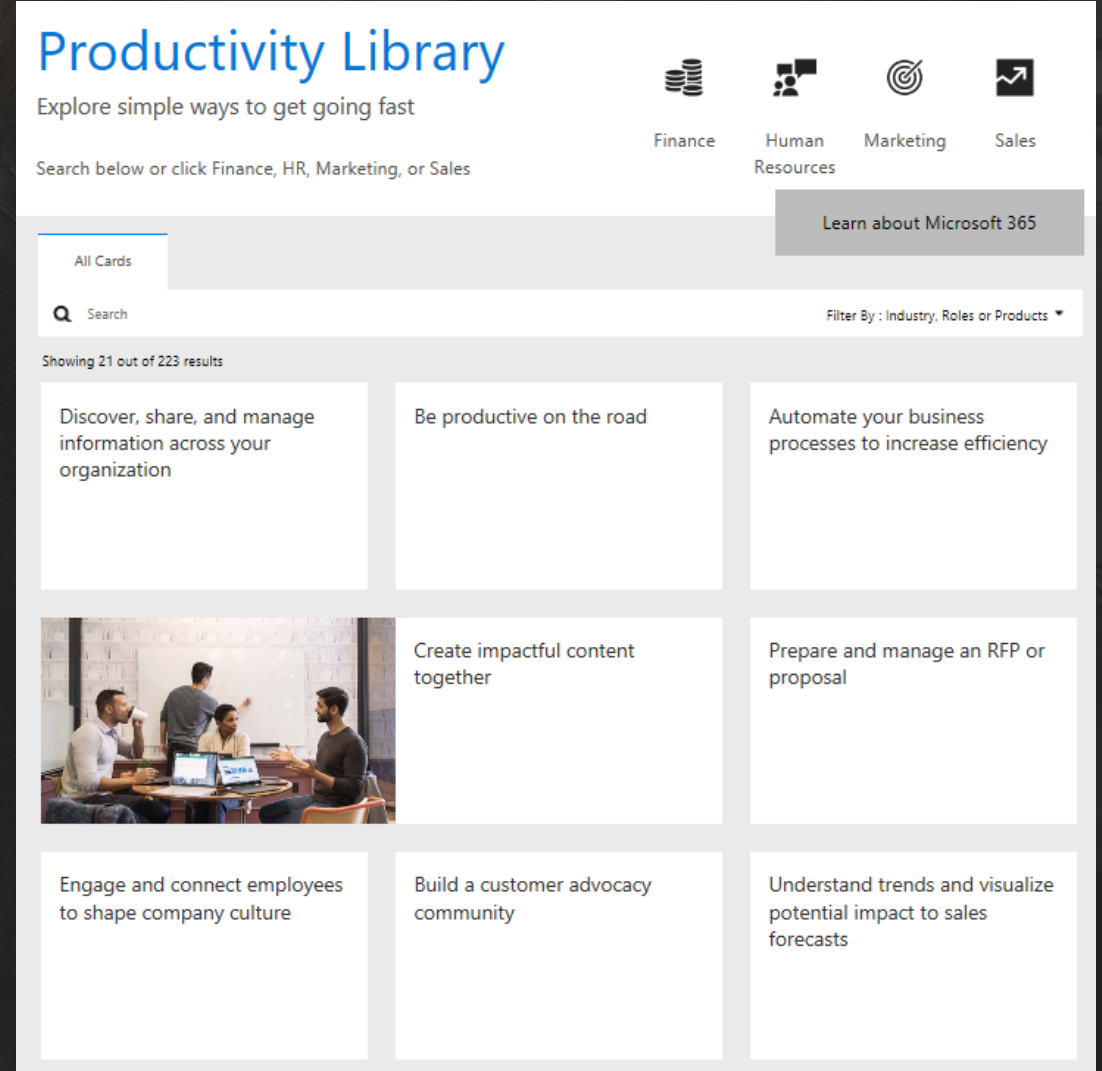
IDENTIFY BUSINESS SCENARIOS

Identifying and defining your Business Scenarios is an important step in ensuring your organization both realizes full value from its investment in Microsoft 365 and also achieves a smooth adoption. Business Scenarios cover the ways your people will use Microsoft 365 to address business challenges or achieve defined goals.

Train EAP participants around your organizations prioritized Microsoft 365 Business Scenarios. Be careful not to overwhelm your EAP participants with too many scenarios – instead focus on two or three scenarios that will likely be practical for them no matter what their role is. Use the available scenarios communication assets and training resources available on Productivity Library.

➔ <http://aka.ms/productivitylibrary>

Of particular use is likely to be “Provide a chat based workspace”, “Meet and collaborate with ease” and “Work in email, solo, or as a group” – but organization should chose scenarios that are most relevant.



The screenshot shows the Microsoft Productivity Library website. At the top, the title "Productivity Library" is displayed in blue, with the tagline "Explore simple ways to get going fast" below it. Navigation icons for Finance, Human Resources, Marketing, and Sales are visible. A search bar is present with the text "Search below or click Finance, HR, Marketing, or Sales". A button labeled "Learn about Microsoft 365" is located in the top right. Below the search bar, there is a "Filter By: Industry, Roles or Products" dropdown menu. The main content area displays "Showing 21 out of 223 results" and a grid of nine cards. The cards contain the following text: "Discover, share, and manage information across your organization", "Be productive on the road", "Automate your business processes to increase efficiency", "Create impactful content together", "Prepare and manage an RFP or proposal", "Engage and connect employees to shape company culture", "Build a customer advocacy community", and "Understand trends and visualize potential impact to sales forecasts". An image of four people in a meeting is shown in the middle-left card.

DEFINE SUCCESS CRITERIA AND MEASUREMENT APPROACH

When you develop your ideal Business Scenarios, it's critical to come up with a formal set of success criteria to measure the impact of your Microsoft 365 rollout.

IT SETUP VALIDATION

Where possible, have experienced IT staff members run through a Microsoft 365 sign-in and install process and provide feedback on updates required to EAP materials before launching the EAP.

HOW TO DEFINE YOUR SUCCESS CRITERIA:

You'll need to determine what should be measured and how you will go about collecting both quantitative and qualitative data. Think about the following to help when determining your success criteria:

- Identify business Key Performance Indicators (KPIs) that may improve based on your organization adopting various Business Scenarios (e.g. reduced costs, increased customer satisfaction, improved employee engagement, decreased time to process an order)
- Evaluate where you are before implementing Microsoft 365. Establish your KPI benchmarks and baseline your user's current knowledge of Microsoft 365

To help gather feedback and data to measure the success of your EAP, prepare your EAP participant surveys using our sample Microsoft 365 user satisfaction surveys here: [→ https://aka.ms/usersurveys](https://aka.ms/usersurveys)

- Choose criteria that will help you showcase the impact Microsoft 365 is having on your organization to the leadership team
 - Use the Measuring Success Guide for more information on defining your success criteria:

[→ http://aka.ms/measuringsuccess](http://aka.ms/measuringsuccess)

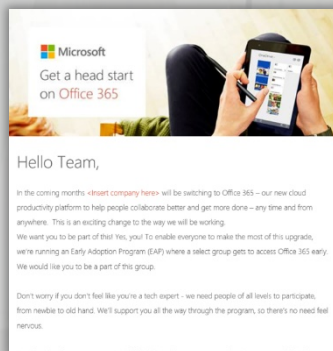
DEVELOP COMMUNICATION MATERIALS

Develop your communications materials by using and customizing the Microsoft provided templates for use in your EAP and launch. Find more information, media, email templates and awareness materials that can be customized for your implementation:

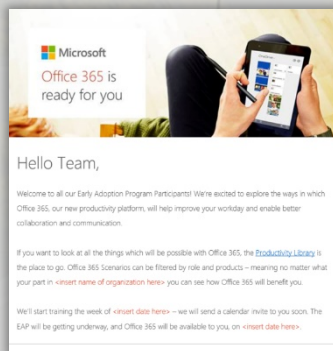
→ <https://www.microsoft.com/en-us/fasttrack/resources>

Establish a Microsoft 365 EAP Yammer or Teams group for participants to discuss the program.

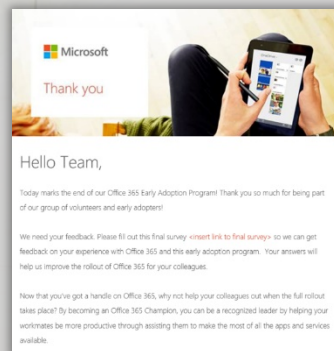
Email 1
Recruitment



Email 2
Welcome



Email 3
Close out



Email templates for your EAP communications are provided by Microsoft and can be customised for your business. They can then be reused on a wider scale during your full rollout, so these shouldn't be just rough and ready.

- **Baseline survey** – collect baseline feedback on what participants are using now and their current levels of knowledge with a baseline survey. A Microsoft 365 User Satisfaction survey template is available to collect baseline data: <https://aka.ms/usersurveys>
- **Recruit participants** – your communication should discuss the purpose of the EAP, how the EAP will benefit participants as well as the entire organization and how their participation will help shape the full organizational rollout. A recruitment email template is available to help shape your communications here: <https://aka.ms/eaprecruitmentemail>
- **Welcome** – this should welcome EAP participants to the program and provide them with the details to get started. A welcome email template is available to help shape your communications here: <https://aka.ms/eapwelcomeemail>
- **Close out** – this should thank your EAP participants and ask them for feedback. A thank you email template is available to help shape your communications here: <https://aka.ms/eapthankyouemail>

SUPPORT & TRAINING PREPARATION

Train your help desk along with IT or the learning specialist who is conducting EAP participant training; gather training materials to share with your Early Adopter users.

Train your help desk to support your EAP participants through the program if they have any difficulties. Learn more here:

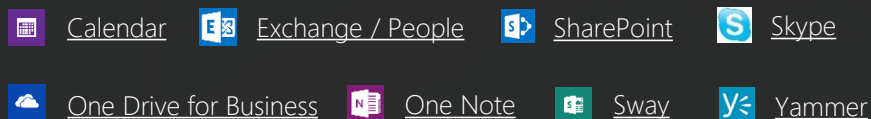
→ <http://aka.ms/helpdeskreedy>

SEND COMMUNICATIONS

Send prepared communications to increase awareness of program. This is a good point at which to use the program sponsor to engage with the EAP participants to create a sense of excitement. Have the welcome email sent by the sponsor and include the baseline survey as part of the email package.

SHARING WITH THOSE NOT IN EAP

It's important for those within the EAP program to have access to work and collaborate with their colleagues as they normally would. They can still share and collaborate on documents with those that are not in the program. Please see the links below to understand how:



PREPARE SUPPORT AND TRAINING

When you are putting together your training program there are some things to take into consideration:

- **The current productivity system you are running.** If you are currently running a productivity system, you may need to spend more effort at the training stage, as the EAP will require a change in behaviour from participants.
- **Other initiatives that are running in the business:** It is important to be aware of what else is going on in the business to ensure that you are not overwhelming your staff and there isn't any confusion around learning new ways to work.
- **The best way of delivery:** It is important to understand how to best deliver specific training for your EAP participants and organization, whether that is microlearning, in-person training, or through assisted or unassisted online tutorials.

WEEK 1

EAP LAUNCH



DEPLOY Microsoft 365 TO PARTICIPANTS

Deploy Microsoft 365 apps and services to the EAP group.

TRAIN EAP PARTICIPANTS

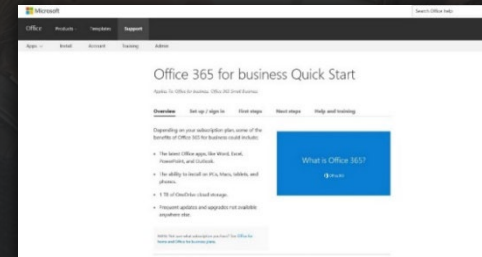
Depending on the size and culture of your organization, how you carry out training will differ. It may involve more self-directed learning, webinars, in-person seminars, or on-demand videos and question-and-answer sessions.

Use your Training Assessment and understanding of your organization to develop a custom training plan.

RESOURCES

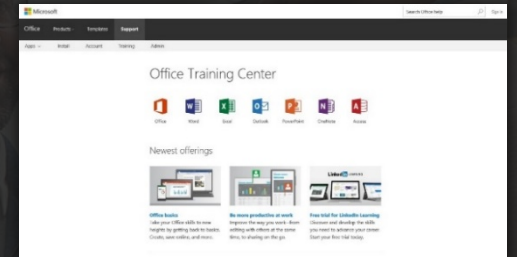
Quick Start Guides

<http://aka.ms/quickstart>



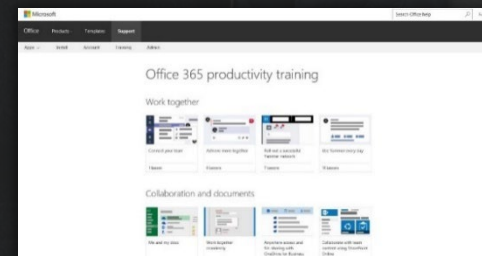
Product Based Training

<http://aka.ms/o365producttraining>



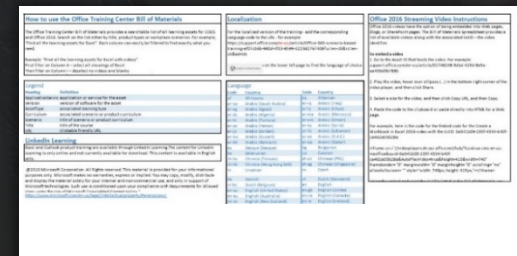
Scenario Based Training

<http://aka.ms/productivitytraining>



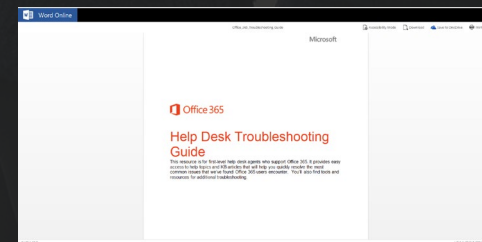
Help in Choosing Training Materials

<http://aka.ms/officebom>



Help Desk Guide

<http://aka.ms/helpdesready>



WEEKS 2 & 3

EAP RUN STATE



ACTIVITIES

INFORMAL CHECK-INS WITH PARTICIPANTS

In weeks two and three, check in with your Microsoft 365 EAP participants for feedback. Rather than a full survey, this can be an informal check-in using pre-identified channels to get quick feedback on crucial aspects.

Understanding how your users are using Microsoft 365 is an extremely important aspect of your EAP. You can utilize the new reporting portal in the Microsoft 365 admin center to get an overview. Monitor usage of the various apps and services to see what your EAP participants are using and use this information to shape your informal check-ins. Ask why some apps or services are not being adopted as well as others.

BEST PRACTICES

Set up channels for feedback during the EAP

- Get real-time feedback from EAP participants and adjust your Adoption Plan based on this feedback. Try creating a **Yammer or Teams** group for your program participants, that way others in the program will be able to see any feedback that is posted and feel encouraged to add on any of their own thoughts
- Proactively reach out to your program participants for feedback. Drop by their desk, send an IM, or give them a call. Remember, if no one is giving any feedback, your program isn't reaching its potential.

For more information on how to use the Activity Reports in the Microsoft 365 admin portal find more information here: [→ https://aka.ms/activityreports](https://aka.ms/activityreports)

WEEK 4

EAP CLOSE OUT



COLLECT FEEDBACK USING SURVEY AND INFORMAL MEETINGS

Check in with your Microsoft 365 EAP participants for feedback. Release a final survey (<https://aka.ms/usersurveys>) to gather data about their experiences with Microsoft 365, along with their experience with the EAP – Microsoft 365 scenarios, communications and training. Hold informal meetings with the participants to connect them and gather unfiltered feedback. As you collect your survey results, ensure that you evaluate your results against your success criteria.

Understanding how your EAP participants are using Microsoft 365 is important in assessing your success and identifying areas for improvement.

UPDATE LAUNCH PLAN AND MATERIALS FOR FULL ROLLOUT

Use the results from the survey, informal meetings, usage insights and performance against your success criteria to make any adjustments to your plan and materials prior to a general rollout.

RECRUIT EAP PARTICIPANTS FOR CHAMPIONS PROGRAM

Encourage EAP participants to become Microsoft 365 Champions to assist their colleagues after the full rollout. Use the final EAP email (<https://aka.ms/eapthankyouemail>) to close out the program and provide information about the Champions program and opportunities to sign up.

- Look for program success stories that can be used in your launch communications to get people excited about Microsoft 365. Success stories are often just as valuable as quantitative measures when demonstrating Microsoft 365 success. Throughout your EAP, have your program participants identify examples that demonstrate collaboration and teamwork and share them as part of your organization launch.
- Build your Champions program. Recruit EAP participants that you think will make good Champions. You'll need support from Microsoft 365 Champions to scale Microsoft 365 to all users.
 - Champions can be found in unlikely places so leverage your networks and look for people who aren't just interested in technology but also in new ways of working and collaborating.

To assist you in building your Champions program see here:

→ <http://aka.ms/championsguide>