

# 15

# Planning and Adoption

In order to get the most value out of any product, you need to have a plan for *adoption*. Successful adoption requires a number of elements, including effective governance, dedicated champions, relevant communication, and the identification of the required business outcomes.

In this chapter, we're going to examine the key pieces of the **Microsoft Adoption Framework** and how they relate to a successful **Microsoft Teams** deployment. These are the areas we're going to tackle in this chapter:

- Introducing the Microsoft Adoption Framework
- Starting your strategy
- Experimenting with early adopters
- Scaling to the rest of your organization
- Planning for change management and support

Microsoft Teams presents many opportunities for aiding collaboration and efficiency. Teams is both an evolutionary and revolutionary product.

It's *evolutionary* in the sense that it continues to leverage the development and architecture of existing **Microsoft 365** products and further extends their capabilities. However, it's also a *revolutionary* product since it has the capability to shift knowledge and collaborative work away from familiar tools (such as **Microsoft Outlook** and discrete web services) and into more chat-based workspaces with integrated applications. While this chapter is primarily about the planning and adoption of Microsoft Teams from a collaboration perspective, the concepts will also be applicable to other aspects of Teams such as **onboarding** and the adoption of the **voice workload** component.

As such, getting users to adopt technology that has the potential to radically change their way of working can also present large cultural and organizational difficulties. Depending on your organization, you may face a wide variety of challenges. The goal of this chapter is to help you overcome them with methodical planning and consistent messaging.

By the end of this chapter, you should be able to start planning a successful Microsoft Teams rollout for your organization or customers.

So, off we go!

## Introducing the Microsoft Adoption Framework

The Microsoft Adoption Framework for Teams is a more concise version of its overall **Cloud Adoption Framework for Azure** (<https://docs.microsoft.com/en-us/azure/cloud-adoption-framework/overview>). The Cloud Adoption Framework for Azure focuses on analyzing the business requirements, documenting the desired business outcomes, establishing overall architecture management teams (for example, the strategy, adoption, governance, and operations teams) to work toward these outcomes, and building deployment strategies.

Inside the deployment strategy for a particular product, an organization might have phases such as *plan*, *adopt*, *govern*, *manage*, *secure*, and *organize*.

Microsoft takes these disparate areas and reorganizes them within broad steps to help accelerate Teams adoption. In this chapter, we'll cover the following processes and phases:

- Starting
- Experimenting
- Scaling
- Planning

Let's start working our way through them.

## Starting your strategy

*Phase 1* of the Microsoft Adoption Framework for Teams is called the *Start* phase. The goal of the Start phase is to ensure organizational readiness. The outcomes of the Start phase include knowing who will play the important roles in the project as well as determining if you need to engage Microsoft or a partner for onboarding assistance.

## Identifying your project team members and stakeholders

Once you've decided to embark upon a Teams deployment and adoption project, you'll need to gather a team to help see it through. The project's success largely depends on everyone in the core project team being committed. The core team's roles are outlined in the following list:

- **Executive sponsor:** Most projects require an executive sponsor to help the business understand the relationship between the project and the organization's goals. For a Microsoft Teams deployment, the executive sponsor will be responsible for communicating the business leadership's requirements to the team and helping the leadership understand the importance and value of the project. Executive sponsors are commonly responsible for identifying the need for the project, although sometimes the executive sponsor is brought in later due to the organization requiring a *face* for an ongoing project. The executive sponsor may also help to secure and administer funding, as well as approve the budget items for a project.
- **Success Owner:** The success owner is responsible for making sure that all business goals are realized. The success owner may need to help shape or adjust the deployment plan to make sure the organization's objectives are achieved.
- **Program Manager or Project Manager:** The program manager (or project manager) is responsible for the actual launch and rollout process, including resources and staffing, budgets, and the timeline.
- **Champions:** Champions are department-level liaisons that evangelize the Microsoft Teams deployment, getting users excited about the upcoming project. Champions are also typically involved in some level of end user (or **power user**) training. Champions may conduct lunch-and-learn style events to further build interest within the organization.

- **Training Lead:** The training lead is responsible for managing and communicating training content. A training lead may also procure training materials or classes or participate in train-the-trainer programs to educate champions or other leads on usage and best practices.
- **Department Leads:** The department leads hold a stakeholder role. They identify usage scenarios for how their individual departments will use and benefit from Microsoft Teams. Department leads also can encourage engagement to help ensure adoption.
- **IT Specialists:** IT specialists will be responsible for ensuring the technology prerequisites are met, as well as ensuring the success of technical deployment aspects such as software deployment, authentication, and integration with other applications and devices.
- **Communication Lead:** The responsibility of the communication lead is to oversee the company-wide communications about the Microsoft Teams project. This includes highlighting the timeline and training opportunities and implementing all corporate communications about the project benefits.

As you can see, there are many different roles necessary to have a successful and smooth Microsoft Teams rollout. While larger organizations may have multiple people performing some of these roles, smaller organizations may have a single person performing multiple roles. However, it's important that all of the roles are filled to ensure nothing is missed in the process.

## Understanding the product

Since Microsoft Teams is a general collaboration business product, it makes sense for all members of the project team to be familiar with its interface, capabilities, and where it fits into the enterprise architecture of the organization. This will help ensure that team members can communicate using a common vocabulary.

For information on general Microsoft Teams architecture concepts, see *Chapter 1, Taking a Tour of Microsoft Teams*.



## Assessing organizational readiness

*Organizational readiness*, in the minds of most solution designers and IT implementers, is synonymous with *technology*. While it's important to make sure your infrastructure is technically capable of meeting the requirements for any product, when it comes to adoption and change management, organizational readiness is about evaluating its *openness* to new ways of doing business. Organizational readiness has more to do with the *cultural mindset* of an organization than anything else.

Your organization may already follow an established change management methodology such as **Awareness, Desire, Knowledge, Ability, and Reinforcement (ADKAR)**, the **Accelerating Implementation Methodology (AIM)**, or the **Kubler-Ross Change Curve**, which will make implementing change in an organization much easier. Your organization may even have certified change management practitioners or an **Adoption and Change Management (ACM)** practice/group. If so, we recommend that you leverage these individuals to help your adoption efforts take hold within the organization.

Most change management frameworks or methodologies involve concepts of rationalizing change and overcoming change aversion within a given setting, both of which are important to helping individuals internalize the need for adoption.

You may find it beneficial to research effective change management methodologies to help you along your journey. You can refer to the *Further reading* section of this chapter for additional resources.

Change management isn't a one-person job. While this book is targeted at IT professionals, the role of change management will require others within the business.

Assessing your organization's readiness will involve evaluating three types of people: *stakeholders*, *early adopters*, and *all users*.

### Stakeholders

Stakeholders are the key business representatives and leaders in your organization. For each stakeholder identified, you'll want to ask yourself several questions:

- Is this individual friendly or open to new technology?
- Is this individual satisfied with the current state of the organization's technology?
- Is this individual willing to try new things to accelerate results or move the business goals forward?
- What kind of pressure is this individual under to deliver results?
- Will this individual be willing to be a champion or evangelize on behalf of the project?

- Does this individual have good relationships with members of the project team?
- What motivates this individual? Key motivators may include financial benefits, being viewed positively by leadership, and being seen as a change agent or visionary.

As part of the project team, you'll want to identify individuals who want to be seen as change agents, who are friendly to technology and change, and who express some level of dissatisfaction with the current tools. These individuals can act as advisors to the team to help you with adoption efforts.

## Early adopters

Identifying *early adopters* is a key task in the Start phase—you need to find individuals who are interested in change and are excited to try new things. Gathering early adopters from a broad cross-section of the company is important to make sure the project team understands how Microsoft Teams will work with different parts of the business. These key insights will help the project team deliver effective messaging.

You can poll your organization with a questionnaire to help users express an interest in taking part in an *early adopter* program.

## Users

The *users* group is comprised of everyone else in the organization. Knowing the culture of your organization is key to understanding how to put together effective adoption strategies. If the organization's culture is generally adverse to change, you'll want to start early on your messaging campaign and drive home the importance of how Microsoft Teams will benefit both the business and individual users.

The Start phase is focused on building the project team and the business case, as well as assessing the organizational readiness. After selecting the project team and identifying the different stakeholders in the business, you're ready to begin the *Experiment* phase.

## Experimenting with early adopters

The *Experiment* phase is really about implementing a small-scale deployment of Microsoft Teams for real-world scenarios. In this phase, we recommend that you look for a project, task, or business process with these characteristics:

- It should be led by one of the business stakeholders that is IT-friendly and has a good relationship with the project team.
- It should have a willingness and ability to involve early adopters.

Choosing one or two projects, tasks, or business processes that can incorporate these individuals will really help you learn more about how your organization can benefit from Microsoft Teams and also provide feedback for various aspects of the project, including its technical readiness and communication strategies.

## Finding your champions

*Champions* are an essential part of both the *evangelism* and *feedback loop* processes for a project. Champions will help get other employees and users excited about the technology and processes as well as communicate back to the project team any successes and challenges they encountered along the way. Champions are primarily motivated by helping others and working toward the overall organizational success of the deployment.

To increase their effectiveness, champions should be formally trained in the Microsoft Teams product so that they can answer questions from users and potentially deliver ad-hoc training such as brown bag meetings or lunch-and-learn sessions.

You may also want to encourage champions to join a broader community. Microsoft provides a free monthly Champions community call as part of their worldwide **Champions Program** (available at <https://aka.ms/O365Champions>). Here, individuals can learn tips and tricks to improve their effectiveness, gain deeper insights into how Microsoft Teams works, find out more about evangelism, and learn about getting the most out of the platform.

A good internal champions program can really help excite your organization and help adoption efforts gain traction.

## Developing a governance strategy

*Governance* refers to the broad strategy for how an organization will manage its **data estate**. Governance plans will dictate the life cycle of different aspects of the adoption, such as how users will be onboarded into the system, how their data will be secured, and what will happen to their data after they leave the organization.

Governance planning is one of the most often-overlooked pieces of a project. It's also one of the most difficult things to go back and apply later (for example, after people have developed bad habits or processes that don't line up with the business goals). Lack of governance can also expose organizations to risk, so it's important to be as prescriptive as possible with it early on.

We will take a deeper dive into governance in *Chapter 16, Governance*.

## Identifying usage scenarios and telling user stories

Helping individuals understand how a new product or service will benefit them is key to many change management methodologies, for example, the **ADKAR (Awareness, Desire, Knowledge, Ability, Reinforcement)** model. Human nature frequently drives people to choose the known over the unknown and to favor the status quo over change. You can help overcome this change aversion by helping people internalize the answer to a simple question: *What's in it for me?*

This is where usage scenarios and user stories become important. Microsoft provides several templates and ideas around this, as shown in *Figure 15.1*:

Project Management	Personal Productivity	Modern Meetings
Enable	Empower	Extend
<ul style="list-style-type: none"> <li>• Use Microsoft teams as the hub for teamwork to access both office and other third-party apps</li> <li>• Communicate exclusively through Teams to drive transparency</li> <li>• Pin important apps and documents for visibility</li> <li>• Stream line document versioning</li> </ul>	<ul style="list-style-type: none"> <li>• Connect external apps, organize notes, and manage tasks in one tool</li> <li>• Send messages and see status visibility easily</li> <li>• Conduct ad-hoc group chats</li> <li>• Use persistent chat with shared storage to reduce sending emails with file attachments back and forth</li> </ul>	<ul style="list-style-type: none"> <li>• Build momentum pre-meeting with chat and content sharing</li> <li>• Refer back to chat and shared content after a meeting is over</li> <li>• Connect and transfer meetings between multiple devices to ensure alignment, continuity, and ease-of-access</li> <li>• Record meetings and notes for absent attendees</li> <li>• Capture notes and actions for easy follow-up</li> </ul>

Figure 15.1 – Core usage scenarios for Microsoft Teams

Building these user stories is essential to helping users understand their own set of advantages in using a new product. Once these benefits are internalized, users will be more likely to approach adoption with an open mindset.

You can use the template in *Figure 15.2* to help build your own user stories or usage scenarios:

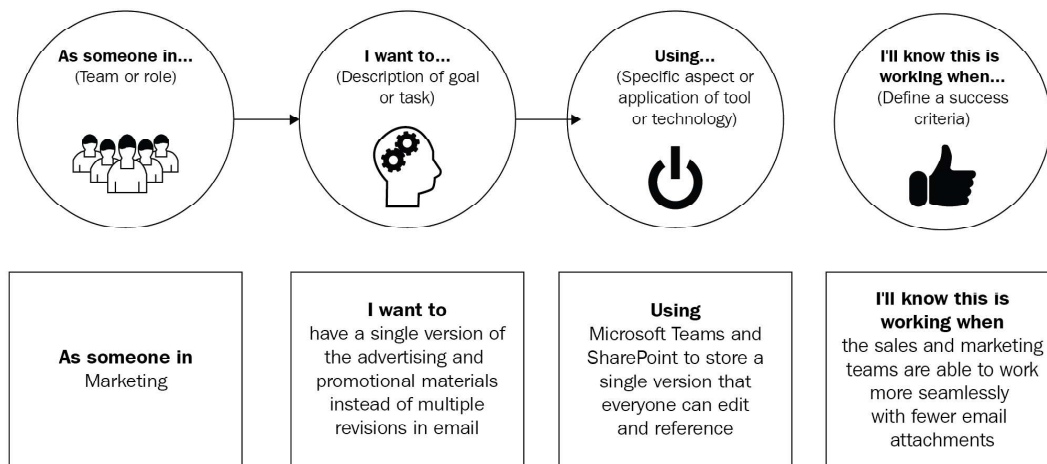


Figure 15.2 – Usage scenario template

Building relatable and realistic user stories and usage scenarios will be beneficial to your overall project effort. With these, you'll be able to focus on what applications you need to integrate and how the business will derive an overall benefit from the project. You can work with your champions and business stakeholders to identify key scenarios to help build buy-in and momentum for your adoption process.

## Interviewing business stakeholders

At the beginning of the Experiment phase, we recommended that you select a project, task, or business process that you can manage with Microsoft Teams. With this project, task, or process in mind, interview the relevant business stakeholders. You'll want to ask several questions to help develop success criteria and tailor how you'll use Teams:

- What are some of the challenges or pain points as they relate to communications or collaboration that you've experienced in previous projects or tasks, or that you are currently experiencing in this business process?
- What are some areas you'd like to see improve?
- What methods of communication or collaboration generally seem to work best for your team?
- How is information typically created and shared within your team?

You may already think you know the answers to some of these questions, but part of the change process is allowing others to participate and feel like they are both being heard and providing value. Listening to concerns and recommendations is a key part of consensus building and will help stakeholders take ownership of the success of the project.

## Onboarding Support

Since Microsoft Teams may be new for many people, it's important to bring your support teams up-to-date with training materials. In addition to the early adopter and champion communities, you'll want to make sure your support teams are fully equipped to support user requests—specifically relating to technical issues such as installation, access, and authentication, as well as device and network requirements.

## Onboarding Early Adopters

Once you've identified projects, tasks, or processes that you'll use to pilot Microsoft Teams, you can start building your early adopter community. This may involve things such as a dedicated **Yammer** group or a new Microsoft Team for early adopters and champions.

After you've decided how to host the resources for your early adopters, follow these steps to begin engagement:

1. Send an invitation email to invite them to the early adopter program or community. This email might include pre-requisite tasks such as downloading and installing Microsoft Teams and accepting a meeting invitation for a kick-off call.
2. Host a kick-off call to explain the goals of the early adoption program. You may wish to introduce the core project team and explain some of the user scenarios you've already identified.
3. Ensure everyone has access to the relevant tools (for example, Yammer groups, Microsoft Teams groups, SharePoint sites, or other resources) for support and feedback.
4. Schedule community meetings or surveys to gather feedback from early adopters.

Be sure to take advantage of the feedback of early adopters—this will help identify any issues (technical or cultural) that could impact a broader Microsoft Teams deployment and adoption effort.

Once the Experiment phase is underway, it's time to begin planning for the Scale phase.

## Scaling to the rest of your organization

The *Scale* phase involves revisiting the feedback your project has received so far (both positive and critical) and adjusting your delivery methodology to overcome any technical and organizational challenges. Where the Experiment phase may have focused on a few particular projects, tasks, or business processes, the Scale phase will likely expand to see Teams used in ways you didn't anticipate. It's important to maintain support and flexibility to ensure the broadest adoption of the platform—good ideas can come from anywhere and are not limited to only the project team.

In this section, we'll explore the best practices for ensuring you complete a successful Microsoft Teams rollout and adoption.

### Defining success

In the Start and Experiment phases, you likely identified key projects, tasks, or processes that could benefit from Microsoft Teams. You probably also worked on building user stories and usage scenarios to support investment, ownership, and adoption.

As you prepare to move into the Scale phase, it's important to revisit and expand all of these to cover as many aspects of your organization as possible.

Successful outcomes can generally be divided into four categories:

- **Organizational:** These include employee retention, talent acquisition, cultural transformation, and operational agility.
- **Cultural:** These include employee morale or sentiment, customer feedback, openness to innovation, and improved attitudes toward new technologies and processes.
- **Tangible:** These include financial success (for example, cost reduction, revenue generation, improved margins), operational efficiency, improved net promoter scores from interactions (for example, customers or human resources), security, and the simplification of access.
- **Individual:** These include employee engagement and morale, productivity, and innovation.

You can reuse the scenario template provided in *Figure 15.2* to help map out success criteria for the business outcomes.

## Selecting a service enablement strategy

As you begin to build your plan for broad rollout and adoption, you'll need to select a *service enablement strategy*. The strategy behind the Scale phase will largely depend on a few core metrics:

- How broadly Microsoft Teams is already deployed in your organization
- What competitive products are in place that could cause disruption to your timeline
- If **Skype for Business** (either on-premises or online) is deployed
- Executive/management commitments or organizational politics

Microsoft has identified five core enablement strategies and what might lead an organization to choose one of them:

- **Teams First:** This strategy works best for teams that have new or low usage or engagement of Microsoft 365 customers. This approach builds on the Experiment phase directly by highlighting core usage scenarios and user stories to drive adoption.
- **Teams Core:** This strategy is focused on enabling Teams with **Microsoft SharePoint** and **OneDrive** components and drawing strong integration between the components. It focuses on enabling multiple collaboration tools together such as Teams, Yammer, **Planner**, and SharePoint.
- **Teams Go Big:** This strategy is recommended for organizations with less than 5,000 users. It relies on the creation of company-wide teams that everyone is automatically added to. The *Teams Go Big* strategy is an immersive strategy that focuses on getting everyone to use Microsoft Teams as quickly as possible by providing new ways to accomplish tasks through integrated apps (such as vacation request), surveys, company-wide meetings, and executive engagement.
- **Skype Side by Side:** This strategy is also sometimes referred to as *Meetings First*. It is intended for organizations that have deployed Skype for Business or **Skype For Business Online** calling features. *Skype Side by Side* is a coexistence mode where the enterprise calling features still utilize the existing Skype client and infrastructure but use the *Teams Core* strategy collaboration and chat tools.
- **Migration:** This coexistence strategy leverages both *Skype Side by Side* and *Teams Core*, with a focus on transitioning enterprise voice and calling features from Skype for Business to Microsoft Teams.

Expanding your deployment in the Scale phase may also require you to go back and re-evaluate your governance strategy if you didn't map it out or implement it fully.



If you have a large or geographically distributed organization, you may also find it beneficial to revisit the Experiment phase for piloting and onboarding. Recognize that there may be organizational and cultural differences that require flexibility in the timing and approaches used to achieve the best result.

As with the initial Experiment phase, you'll want to be sure to involve key influencers, decision-makers, and other stakeholders.

## Optimizing feedback

One challenge that organizations face when migrating and adopting any new technology (particularly a disruptive or transformative technology that changes how users engage in their daily roles) is deciding when to use the new (versus the old) tool. In the Experiment phase, you began collecting feedback about how Microsoft Teams was working across the organization. Undoubtedly, the question of when to use Teams came up.

Some other questions you might encounter are as follows:

- How do I choose when to use Microsoft Teams or email?
- Can I share confidential or sensitive information within Teams?
- What business scenarios are approved for use with Teams? What scenarios aren't?
- How do I develop new applications on this platform?

Based on the feedback you received, you may wish to develop some sort of **Frequently Asked Questions (FAQs)** resource to help users find answers to these common queries. Share this information through multiple channels (for example, Teams, email, community calls, champions, and so on) to help users locate the information they need.

## Driving awareness

Part of your broad adoption program is going to be telling users that a new, useful tool is available to them. You can do this with an *awareness program*, which is really a marketing campaign targeting your users.

Along the adoption journey, you'll want to hold events (for example, town hall-style question-and-answer sessions, meetings, and calls) to help employees understand the importance of the change and how they will benefit from it. You'll also want to provide links to training materials to help users learn on their own. It may be beneficial to hold regularly scheduled end user meetings (in addition to your champion and early adopter meetings) to continue to drive awareness and generate a buzz about your project.

You can use the self-help video series at <https://aka.ms/teamstraining> to start building your own library of end user training materials.

## Delivering a training program

To really get the most out of any platform (including Microsoft Teams), you may also want to deliver more formal training for both end users and administrators. There are currently a number of resources available for both, including webinars, instructor-led training, and certification courses.

For more information on training and certification options, see <https://docs.microsoft.com/en-us/microsoftteams/instructor-led-training-teams-landing-page>.

## Establishing checkpoints and reviews

At some point, your deployment will shift from *onboarding* to *operations*. Once you reach an operational phase, the management tasks of the Microsoft Teams infrastructure will shift away from the project team to an operational support team responsible for service delivery.

Before that happens, though, you will want to plan how to share information from the project team with the operations team. There will be some sort of transition period between the project and the support teams, and this is a good time to help bring the support team up-to-speed on how Microsoft Teams works, as well as to share any usage, capability, health, or operational insights you may have.

Plan to establish a periodic cadence meeting between the project team and the operations team during the Scale phase to discuss the following areas:

- **Service usage:** This may include active Microsoft Teams usage data or other reporting metrics from within the Microsoft 365 platform. You may also choose to highlight how Teams onboarding and adoption have impacted other tools in your environment (such as decreased usage or the retirement of other tools).
- **Service health:** Use this area to discuss things such as network connectivity and bandwidth, call quality (if calling features are part of the deployment), service ticketing procedures, and support incidents.
- **Roadmap:** This topic can be used to discuss the current project status, such as onboarding or adoption percentages, as well as how the Microsoft Teams project could be impacting other collaboration projects throughout the organization.

You should work toward building a good relationship between the core project team and any operational teams during this project. Depending on your role in the organization, you may find yourself working with those individuals closely again. Establishing a good, mutually respectful relationship will help this individual project, improve operational efficiency for the organization, and positively influence future projects.

## Planning for change management and support

Especially in larger organizations, a Microsoft Teams adoption program will involve a lot of moving parts. The change management and communication teams will likely be made up of several non-technical individuals, so it's important that everyone from the project or implementation team work together to build a coherent plan and strategy.

In this section, we'll briefly outline the various roles, and we'll lay out a sample task list that can be used in planning.

### Using a roles matrix

Every project has a number of defined roles. In smaller organizations, one individual may perform several of the roles. While people may have multiple roles assigned to them, each role has certain responsibilities. While some roles were identified earlier in this chapter, the following table lists common roles associated with a project.

Role	Description
Executive sponsor	The executive sponsor (sometimes called the project sponsor) is generally a member of an organization's leadership who is responsible to the business for the success or outcome of a project.
Success owner	The success owner is responsible for making sure business goals are realized. The success owner may need to help shape or adjust the deployment plan to make sure the organization's objectives are achieved.
Program manager	The program manager is an individual authorized by an organization to lead one or more teams responsible for completing projects.
Communications team	The communications team can comprise individuals from internal corporate communications staff.

<b>Role</b>	<b>Description</b>
IT leadership team	This contains leaders of various IT teams in an organization (such as the project services, service desk, and IT operations teams).
Subject matter expert	Subject matter experts will be responsible for ensuring the technology prerequisites are met, as well as ensuring the success of technical deployment aspects such as software deployment, authentication, and integration with other applications and devices.
Vendor	Vendors may include hardware or software vendors for Microsoft Teams phones, room systems hardware and devices, add-ins, or other collaborative features.
Microsoft team	The Microsoft team comprises support resources from Microsoft, including Microsoft FastTrack, Microsoft consulting services, and Microsoft Premier Support for Partners.
Champion program	An organization-wide team that identifies champion teams for particular programs or projects.
Champion team	Champions are department-level liaisons that evangelize the Teams deployment, getting users excited about the upcoming project. Champions are also typically involved in some level of end user (or power user) training. Champions may conduct lunch-and-learn style events to further build interest in the organization.
Training lead	The training lead is responsible for managing and communicating training content. A training lead may also procure training materials or classes or participate in train-the-trainer programs to educate champions or other leads on usage and best practices.
Adoption and change management specialist	Adoption and change management specialists are trained individuals that can help overcome both individual and organizational biases against change.

Role	Description
Implementation team	The broad team of IT generalists and specialists that will be enabling features, devices, and users.
Collaboration improvement team	The broad project team tasked with improving collaboration processes and technology across the organization.
Business leads or stakeholders	Business leads or stakeholders are organization leaders whose interests are represented or impacted by a project.
Human resources	The human resources representative, team, or department of an organization.
Legal	The legal representative, team, or department of an organization.

Table 15.1 – A project roles matrix

It's important not just to build a *deployment* plan but also to build an *adoption* plan. Adoption plans seek to transform the business rather than just install a new piece of software for everyone. Building a project team focused on adoption will help make your project a success.

## A sample adoption plan

It's important to have a list of tasks that can be incorporated into a larger change management plan. Your organization may have an existing template or blueprint for building projects. You can use this sample task breakdown as a starting point for your own project plan or to help flesh out an existing template.

Role	Description
Implementation team	The broad team of IT generalists and specialists that will be enabling features, devices, and users.
Collaboration improvement team	The broad project team tasked with improving collaboration processes and technology across the organization.
Business leads or stakeholders	Business leads or stakeholders are organization leaders whose interests are represented or impacted by a project.
Human resources	The human resources representative, team, or department of an organization.
Legal	The legal representative, team, or department of an organization.

Set up a Microsoft Teams team for project collaboration.	IT team
Conduct stakeholder and service communications.	Program or project manager
Schedule a regular meeting and communication cadence.	Communications team
Align on the stakeholder key messages, reporting milestones, and formats.	IT leadership, success owner, communications team
Conduct monthly reviews with key stakeholders.	Program or project manager
Identify the communications channels for key updates, including stakeholder reporting, service adoption updates, and helpdesk/support communications.	Communications team
Review the strategy and business scenarios.	Success owner, business leads, implementation team
Review the service strategy template.	Success owner
Complete the draft service strategy template.	Success owner, business leads, implementation team
Review the default persona templates.	Success owner, business leads
Identify and document the business scenarios.	Success owner, business leads
Receive any feedback from key user populations.	Implementation team, communications team
Receive any feedback from select business leads.	Implementation team, communications team
Draft per-scenario service onboarding and adoption plans.	Implementation team
Review all deployment plans with the stakeholders.	Success owner, implementation team
Define success criteria.	Success owner
Set baselines for usage and process data.	Implementation team
Usage reporting	IT team
Crowdsourced success stories	Communications team
Campaign reach	Communications team

<b>Task</b>	<b>Owner or responsible party</b>
Training participation and satisfaction	Training team
Complete technical readiness checks.	IT Team
Request FastTrack assistance, if desired.	Implementation team, success owner, IT team
Complete all legal and security reviews, including the service capability review, guest access, and provisioning processes.	Implementation team, IT team
Complete any network assessments for voice and video services (if necessary).	IT team
Complete client requirements assessments.	IT team
Ensure that there is proper network communication with Microsoft 365 data center resources.	IT team
Enable services (licensing).	IT team
Implement enterprise policies, including governance, guest access, and security policies.	IT team
Assign any required additional support and security roles (such as report readers and Teams supporting service roles).	IT team
Onboard the support organization.	IT team
Identify any champion/training leads.	Champion program
Conduct a service overview with the support and champion leads.	IT team
Update the service desk systems.	IT team
Train the support organization.	IT team, training lead
Define the support processes for the early adopter program (EAP).	IT team
Create a Yammer community for any EAP feedback.	IT team
Develop and launch the champion program.	Champion program
Recruit the champions.	Champion program
Define the feedback systems.	Success owner, implementation team

<b>Task</b>	<b>Owner or responsible party</b>
Develop training materials.	IT team, training lead
Champion onboarding and training.	Champion program, training lead
Define and launch the EAP.	Champion program
Recruit the early adopters.	Champion team
Develop and circulate baseline surveys to capture sentiment about existing collaboration tools in the organization and what participants are hoping to see from Microsoft Teams.	Communications team
Develop the feedback systems.	Champion team
Develop training materials.	Champion team, training lead
Conduct the EAP kickoff and training.	Champion team, implementation team
Monitor all feedback.	Champion team
Define and hold office hours.	Champion team
Send final surveys to capture any further sentiment.	Champion team, communications team, implementation team
Incorporate EAP feedback into the broad deployment plan.	Implementation team
Develop and launch an awareness campaign plan.	Communications team
Create key messages and calls to action.	Communications team
Identify key audiences.	Communications team
Validate feedback systems.	Implementation team
Review the current Microsoft Teams Customer Success Kit materials and adapt if desired.	Communications team
Develop awareness campaign success metrics.	Communications team
Develop communication plans (for example, a welcome kit, 30/60/90 day user communications).	Champion team, communications team, adoption and change management specialist
Implement stakeholder reviews and sign-off.	Success owner, implementation team
Make the launch announcement.	Executive sponsor, communications team



<b>Task</b>	<b>Owner or responsible party</b>
Organize measurements and reporting.	Success owner
Onboard core teams to the Microsoft 365 service and usage reporting.	IT team
Develop broad training plans.	Training team
Identify internal training requirements, including the feedback from the EAP and key business scenarios.	Training team
Develop internal training programs.	Training team
Set up an ongoing training schedule and resources.	Training team
Implement stakeholder reviews and sign-off.	Success owner, Training lead
Launch the training programs.	Training team
Manage feedback and listening.	Training team, communications team, implementation team
Standardize the reporting methods for feedback systems, such as surveys and reports.	Training team, communications team, IT team, implementation team, adoption and change management specialist
Manage onboarding and continuous improvement.	Success owner
Manage the ongoing prioritization of key issues.	Success owner
Make periodic updates regarding usage trends, business scenario updates, and technical issues.	IT team
Identify further business scenarios for adoption and/or improvements.	Success owner
Provide ongoing guidance and education for the user community.	Champion team, communications team, training team

Table 15.2 – A sample adoption plan

It's important to note that the adoption plan has a lot of places to collect feedback. Feedback is an important part of the change management process, as it both identifies potential issues and gives users a way to feel as though their voice is being heard. Allowing for feedback and participation ultimately leads to better organization-wide adoption.

## Summary

In this chapter, you learned about how to use the Microsoft Adoption Framework to organize and drive a deployment program for Microsoft Teams. A Microsoft Teams project involves more than just technology—it also involves a significant change management component. You learned about some change management methodologies and how to get buy-in and engagement across the organization.

The Microsoft Adoption Framework for Teams includes three core phases: Start, Experiment, and Scale. You learned about the tasks inside each of these phases and how to best prepare your organization for successful deployment.

In the next chapter, we'll examine governance in the context of Microsoft Teams.

## Further Reading

Successful project and program management are broad topics, as are the different change management methodologies. In fact, many individuals devote their entire careers to researching and writing about these areas.

In this section, you'll find information about various resources – including books, websites, and certifications – to help you along in your Microsoft Teams adoption process and change management education:

- *What is the Microsoft Cloud Adoption Framework for Azure?* (<https://docs.microsoft.com/en-us/azure/cloud-adoption-framework/overview>).
- *ADKAR: A Model for Change in Business, Government and Our Community*, J. M Hiatt, Prosci Learning Center.
- *Organizational Change as a Process of Death, Dying, and Rebirth*, Deone Zell, *Journal of Applied Behavioral Science*.
- *Prosci Methodology* (<https://www.prosci.com/resources/articles/prosci-methodology>).
- *Itil® Foundation, Itil 4 edition*, Axelos The Stationery Office (TSO).
- *Learn More About AIM* (<https://www.imaworldwide.com/resources-aim-methodology>).