



The Complete Guide to Creating A User-Centric Microsoft Office 365 Deployment





Getting to User-Centric with Office 365

These days, keeping employees engaged takes far more than offering the occasional catered lunch.

The people who drive your business don't want to work at companies relying on out-dated technologies and work habits. More than ever, workers are expecting IT to deliver them a technology experience that makes them better, faster and smarter. This goes double for Millennials. Miss out on that expectation, and you might miss out on your next super-star hire.

Which is why we are seeing the shift toward more 'user-centric' IT – building an organization that delivers the tools, access and information your people need and want.

The good news is Office 365 gives IT leaders a powerful opportunity to do just this. Microsoft's cloud productivity and communications toolset offers a natural way to build a workforce of the future, while boosting efficiency and productivity at the same time. It's the best of both worlds.

User-Centric & Your Bottom Line

It's not just about making employees happy. It's about business.

Projects most often fail to deliver, even if migration goes perfectly, when there is not enough done to ensure a smooth, meaningful adoption across the organization. Keeping your focus user-centric will ensure the technology you put in place gets used the way it was intended. That will be good for them, and for the returns your business is hoping to generate.

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While the concept might be new to some, a user-centric approach to Office 365 is simpler than it seems. With methodical planning and good collaboration across lines of business, creating a happier and more productive workforce is well within reach.

The Steps

- Set the vision
- Set objectives, plan to measure
- Deeply understand all users
- Drive awareness, create excitement
- Monitor adoption, prove ROI
- Reduce management headaches

In the following pages you will gain insight working through these essential steps along with do-it-yourself, actionable resources to drive your initiative forward.

Tip!

Look for the **Action Bar** to find downloadable forms, templates, blogs and more.



1. Setting The Vision



If you think creating a vision for Office 365 is a nice to have, think again. A well-defined vision enables employees of all levels to foresee the value the new tools will bring, not only to the organization, but also to the individual roles within.

A clear, comprehensive vision will also improve alignment around key business outcomes and identify measures that get at things lines of business care about – like usage and adoption.



The way forward:

- Know the problem you are trying to solve
- Understand what Office 365 will mean to the entire organization
- Don't assume; creating clarity and alignment with stakeholders is paramount
- Set measurable, meaningful objectives to define success

Components of a solid Office 365 vision:

- Built with the input of all stakeholders – not just IT or management
- Answers the questions “Why?” and “What’s in it for me?” for users
- Concrete, clear and concise

Get started with your Vision Creation now!

- ▶ [Read our blog post on Office 365 vision creation](#) 
- ▶ [Take the Vision Self Assessment Survey and see how clear yours is](#) 



2. Set Objectives, Plan To Measure



Too many organizations commence initiatives like Office 365 without any real concrete objectives in mind to define success. It's not enough to simply set a timeline and budget for the rollout – you need to align the technology to a business outcome, and you need to map those to specific KPIs.

Similar to setting a vision, this next step should take place before any technology is deployed. But it doesn't end there. Once you have completed your deployment, you will come back to these measures and goals to see what is working, what isn't and highlight what needs to change.

Components of Good Objectives

- Define what success will look like in 18 months' time
- Try to get down to 3-5 measurable objectives
- Establish a benchmark for those measures today
- Ensure your measures capture the input from the lines of business impacted

Now that you know your next step, it's time to get to work.

- ▶ [Read our blog post on building a measurable, ROI-focused Office 365 rollout](#)
- ▶ [Download the ROI and Measurement self-assessment tool to see where you stand](#)



3. Deeply Understand All Users



Note the title of this section doesn't say just "users." It says "all users."

While painting a rich picture of your eventual end-users is essential in delivering the correct technology, it's crucial you realize that not all departments and user groups will use Office 365 in the same way. Identifying the differences and opportunities throughout the business will go a long way in ensuring an efficient, fine-tuned Office 365 initiative that appeals to – and helps – users in the most personal way possible.

Step 1: Persona Building

We recommend project leaders take the time to paint a rich, detailed persona for each of their target segments. This will make it simple to identify areas where the technology will line up with a business productivity goal.

Components of a Solid Persona

- You have filled out a complete persona profile for each target segment
- You have a deep understanding of that persona, how they work, their goals and objectives, what their typical workday looks like
- You have a deep understanding of various use cases and how the technology will be used by each group




Step 2: Create Detailed Use Cases

Now it's time to put your characters into action. Download the templates below to chart out detailed use cases. These will help you envision the functionality your diverse users groups will need to succeed, and filter out anything that isn't essential.

The Take Away

With these steps behind you, you will have clear insight into the needs of your users so they can be successful. At the same time, you'll have an initial map of the technologies and applications you need to prioritize as you budget your Office 365 implementation.

Get to know your users with these resources.

- ▶ [Read the blog post on Personas and Use Cases](#) 
- ▶ Download the templates [Building a Persona Builder](#) and [Use Cases](#) 
- ▶ [Take the Millennial Readiness self-assessment survey to understand if your new generation of workers will adopt Office 365 successfully](#) 



4. Drive Awareness, Create Excitement



As you work toward a successful rollout, communicating what's in store for users early and often will be key to your success. The fact is, if people understand how Office 365 is going to help them, they will be far more motivated to learn it and use it. And if you can go so far as to get them excited for it, you've already hit a home run.

Keys to driving effective awareness:

- Show people what's in it for them
- Clearly communicate goals and milestones
- Tailor your language and target your audience

What should you include in an awareness campaign?

Sample awareness campaign schedule

8 weeks	6 weeks	4 weeks	2 weeks	1 week	Launch	Post-launch
Internal site announcements, Department specific awareness tactics						
First Touch Event						
Posters, Flyers, Booklets						
Weekly scenario spotlight						
Help desk training						
Champions training						
Learning center (setup, then update as needed)						
Pilot survey						
Early adopter video						
Lunch & Learn						
Tips & Tricks						
Intranet Site Announcements						
FAQ						
Launch Event						
Executive welcome email						
End user training						
Policies, best practices						
Contests, Giveaways						
Weekly reporting, Success criteria updates						

Examples for a solid communications plan:

As you can see above, there are a lot of actions possible for generating awareness before, during and after an Office 365 rollout. These include:

- 8 weeks out: posters, booklets, intranet announcement
- 6 weeks out: training help desk, create a Learning Center (updated over time)
- 1 week out: an executive welcome email, launch event
- Post Launch: contests and give-aways to incentivize usage

Creating excitement starts here

▶ [Download the Communications Spreadsheet](#)



5. Monitor Adoption, Prove ROI



Once you have done the hard work of getting users ready and launching your Office 365 initiative, simply hitting your budget and timeline targets won't be enough. Starting on Day 1, you must verify your assumptions at the start of planning were right and ensure adoption is happening as expected.

At this stage you will need to:

- Check In: Go back to the Objectives after 6, 9, 12 and 18 months to see how your results are stacking up against the benchmarks you established
- Determine if you are falling short and pivot as needed (again, do this by speaking to your users and collaborating with business lines to see what isn't hitting the mark. You can't do this in isolation)

Components of a Successful Adoption

- You have the measurements in place to see who is using what technology, and to what degree
- You can identify if unwanted behaviors are still happening (e.g. users still sharing massive files via Email versus SharePoint; users not using OneNote, and so on. Always figure out "why", too)
- A communications strategy that begins before the rollout (emails, posters, training, etc)
- The support of Project Champions in visible positions (managers, C-level) readily advocating and using the new suite of tools
- The tools and ability to measure ROI after rollout

The Right Tools for the (measuring) Job

As you can see above, measuring your Office 365 progress requires granular, detailed reporting on specific user segments and activities. Find our blog post below that explores the tools required to accomplish this correctly.

Get measuring

- ▶ [Read our blog post on Office 365 adoption and ROI measurement](#)



6. Reduce Management Headaches



Finally, you've done all you can to ensure a smooth, user-centric Office 365 rollout.

Your work is far from over. The truth is, many IT leaders don't anticipate just how much ongoing attention is demanded from a solution such as Office 365. Many think of hybrid cloud deployments, and dream of automation, and headaches being offloaded to someone else. Unfortunately, especially with Office 365, configuration and user management is an ongoing, essential and time intensive endeavor.

Think of it – you now have numerous user groups left to their own devices to figure and get their work done using this cloud platform. Even the best prep and training won't preclude numerous help desk tickets from day one and onward.

On top of that, even if you wanted to own this task and take full control over managing your Office 365 implementation, the tools that come out of the box don't provide nearly enough flexibility or insight to do this task effectively.

Teaming Up

One popular alternative is teaming up with an expert to stick handle the complications, freeing you up to focus on bigger and better things. Not only does this save you time, but it ensures that a team with experience is taking care of elements that can be costly or risky if done incorrectly. Just think of the costs of mismanaging the licensing for a crucial app like email, and not being able to provide your end users with the tools they need to work. Don't get caught off guard on this one.

Finding a partner

- ▶ [Read our blog post to see why companies team up to drive Office 365 success](#)
- ▶ [Read the **Keystone questionnaire** to see if Softchoice's offering is for you](#)





Well done! You've reached the end of our Complete Guide to Building a User-Centric Office 365 environment.

Key Takeaways:

- ✔ Set The Vision: if you don't know where you are headed, how will your users?
- ✔ Set Objectives, Plan To Measure: now that you know where you are going, know exactly what success will look like
- ✔ Deeply Understand All Users: Picking the right tools for the job is key. To do that, you'll need personas and clear, detailed use cases to discover what those jobs are.
- ✔ Drive Awareness, Create Excitement: When your users know – and get excited – for what's coming, they are much more likely to adopt. Follow the templates provided for success.
- ✔ Monitor Adoption, Prove ROI: Excellent training and communications are only part of a successful roll out. You've now got to measure ROI against the benchmarks you set at the start.
- ✔ Reduce Management Headaches: Taking on more than you can handle is unwise, and will hurt user experience and potential returns. See if teaming up with an expert managed services provider is the right course of action for your team.

Ready to Get Started?

- ▶ [Read more about Keystone, our Office 365 managed services solution](#)
or contact your Softchoice Account Manager today for more information.

