Microsoft Teams increases collaboration in the modern workplace at Microsoft

Microsoft is increasing the collaborative capability of our organization with Microsoft Teams. We've initiated a fundamental change in the way our employees interact and communicate, with Teams as the hub for communicating, meeting, and calling. We're using change management processes and education so that our people can adopt and use Teams to its full capacity. As adoption grows, we are learning from the process and modifying our strategy to help people more efficiently make the cultural shift to the modern workplace with Teams.

Accelerating digital transformation with Teams

Teamwork is an important aspect of the modern workplace, and a key element of enabling digital transformation at Microsoft. Teams brings together tools and communication methods and is a hub for teamwork. Microsoft Core Services Engineering (CSE, formerly Microsoft IT) is on its own path to digital transformation, and we believe that Teams has the potential to offer a new, more efficient way to work. Teams offers significant changes to collaboration, teamwork, and productivity within the Office 365 universal toolkit that we want to realize in the modern workplace at Microsoft. The changes that Teams offers include:

- **Teams is the hub for teamwork within Office 365.** Teams fulfills the collaboration and communication needs of a diverse workforce, including chat, meetings, voice, and video. The look and feel of these functions is fast and fluid, has low-overhead, and is instantly familiar.
- **Teams integrates with all the apps our employees use.** Teams integrates with Word, Excel, PowerPoint, OneNote, SharePoint, the new Planner task management app, Stream video portal—even Power BI—so employees have the information and tools they need. Team members can also include other apps and services in their workspaces, for the team and organization. Teams allows the ability to customize workspaces with tabs, connectors, and bots. For our developer community, Teams has an extensible platform for building apps with a rich set of capabilities to support high-performing teams.
- **Teams offers a complete meeting experience.** We expect that with the advent of Teams-capable conferencing devices, Teams will modernize the meetings experience. Before a meeting, team members can review conversations; during a meeting, teams can share content and use audio conferencing and video. Teams supports private and group meeting capabilities, scheduling capabilities, and free/busy calendar availability.
- **Teams has integrated security.** Teams comes with the enterprise-grade security integrated with the Office 365 Security and Compliance Center and Azure Active Directory. It fits neatly into our primary solution for identity and access management, and allows us to maintain control over our data and environment.

Teams, in combination with Office 365, creates a hub for modern collaboration and effective teamwork. It empowers our employees to engage with the business and each other in a way that transforms our business for the better, moving our entire organization closer to fully realizing digital transformation. We want to shift our center of gravity to Teams to speed employee productivity and the velocity of communication.

Making adoption happen with change management

At Microsoft, the official decision to implement a workstyle change is typically made at the organizational or executive level. However, the impetus for change starts earlier, in response to the changing business needs of our people or parts of our organization. We have diverse groups that need to work in different ways, and adapting to modern workstyles is exactly what Teams adoption is about. Our management recognizes that each of these groups has unique needs, and those needs factor heavily into how we manage organizational change.

Making change a more practical reality

While we want each employee at Microsoft to be empowered to adopt Teams in the way that best fits their workstyle, we also realize that identifying the most common uses of collaboration tools helps our people see how Teams can benefit them every day. So, we give them a snapshot of "a day in your digital life." We built our vision of Teams into the most common tasks in the modern workplace. For example:

- **Get up to speed during morning coffee.** Use Outlook to check email and manage your calendar, Teams to check chats and stay current on projects, and Office, OneDrive, and SharePoint to create or review documents.
- **Stay connected on your commute.** Use Teams to join personal meetings or chat with voice and text, Skype to watch live video meetings, and Outlook to connect to a meeting from an email or calendar item.
- **Hold meetings at the office.** Use Teams for personal meetings with small groups or to manage notes and actions in Teams channels. Use Skype for large meetings with conference room hardware or anonymous participants.
- **Collaborate with your team.** Use Teams to communicate using chat, video, screen sharing, and to coauthor files within a team. Use OneDrive and SharePoint to save and share documents to and from the cloud.
- **Connect across the company.** Use Yammer to track organizational updates, share knowledge, and find experts and answers. Use SharePoint to create and manage communication sites and publish news for broad groups of stakeholders.

At the core of managing organizational change is understanding how to manage change with a single person. Because overall adoption depends on wide adoption by our employees, much of our change management process revolves around meeting the needs of each employee. The essential needs are:

- Awareness of the need for change.
- Motivation to adopt or support the change.
- An understanding of how to make the change happen.
- The ability to implement or acquire the desired skills and behaviors to make the change.
- Organizational support and reinforcement to make the change permanent.

Establishing structure for change

We also recognize the need for a structured, documented process to help our adoption team coordinate change. We need to provide a common toolset for them to use and enable them to scale initial change into company-wide adoption. We've adopted four pillars to help us deliver well-managed change from start to finish.

Awareness

The awareness pillar is about landing the message. Before we even got our employees into training, we knew we needed to make a good first impression, hit the points that will interest them, and find the message that excites employees about Teams. The awareness pillar encompasses several important tasks:

- **Identify key roles to use teams and describe the value and impact.** Our field and role guidance helps our adoption team identify how Teams provides value to our employees. We examine the different roles within Microsoft and identify how Teams functionality serves those roles.
- **Create a visual campaign to build awareness.** Our worldwide visual campaign used a combination of physical and digital advertising and signage across Microsoft campuses, as well as on our internal portal sites and social media platforms to efficiently get Teams in front of as many people as possible. We wanted Teams to be recognizable, and we wanted our employees to be aware of its availability and benefits.
- **Use internal social channels to engage communities and build excitement.** Community engagement is about preparing the organization for adoption and increasing overall awareness. We extended the reach of our awareness materials into company portals. We used Yammer to broadcast our message across the organization and encouraged dialog among employees.
- **Inspire adoption with a supportive community of power users and influencers.** Creating a community of power users and fans will inspire adoption within their spheres of influence, answer questions, help with social engagement, and give product feedback. Champions are key to ensuring the success of communities. Having executive buy-in reinforced the campaign. When management describes how they personally use Teams in a message or speech, people take notice.

Engagement

The engagement pillar builds on awareness and starts putting Teams in the hands of our users while ensuring they have the training, guidance, and tools to succeed with it. Engagement is about integrating Teams into our employee's modern workplace in a way that increases collaborative productivity.

- **Run a pilot program to test readiness.** The pilot is one of the most crucial components of the adoption process. Early users at Microsoft tested Teams and helped us identify how and why our employees would want to use it. We used the pilot program to test and find areas where training or configuration would encourage broader adoption.

- **Create buy-in with stakeholders by designing engagements to build momentum.** In these engagements, we sat down with our business teams to give hands-on, in-person guidance for using Teams. We offered common scenarios for using Teams, demonstrated Teams features, and gave general guidance. It allowed us to focus in on a business team and show how Teams would be used in their day-to-day work.

- **Establish opportunities for Q&A.** Our Art of Teamwork Tour was an open, large-scale forum for us to present our vision for Teams at Microsoft. We identified important and common use cases and showed how Teams could be used. We presented not only the benefits of Teams to the individual, but also to the whole of Microsoft. We explained to our users how Teams fits into our organization.

- **Develop internal resources for support and information about using Teams.** The Toolkit for Teamwork gave people resources to help them move forward with Teams. It offers practical resources to increase engagement and encourage effective use of Teams. The toolkit includes templates, training resources, tips, and tricks.

Measurement

The Measurement pillar keeps track of the practical steps of the engagement pillar. Once we've engaged the user community, we need to track the effectiveness of our efforts. Measurement is about acquiring actionable feedback on the adoption process and using that feedback to refine and improve the process.

- **Use your pilot feedback to elevate opportunities, offer insights, and adjust course.** Our pilot program included a broad cross section of our user base along with some of our most involved and passionate Teams adopters. Feedback came through support staff, social channels, UserVoice, and representative leaders. The program validated use-case scenarios and kept us aware of problems and successes during early rollout.

- **Create the key areas your organization will use to understand adoption and measure success.** We developed monitoring methods and metrics to track progress. We gathered usage statistics to gauge overall adoption and correlate trends to time-of-day, business events, and engagement efforts.

- **Establish listening systems to measure engagement.** Listening systems provided active feedback from our user base. We used multiple listening systems, including Yammer, to increase our awareness of what our users were saying and how they were responding to Teams. Our internal helpdesk identified issues and helped us prepare to mitigate common issues.

Management

The Management pillar is the final pillar of the four and has the longest lifetime of any pillars in the change management process. Management is about gaining efficiency and ensuring user satisfaction once Teams is in place. Management means continuing to support Teams and finding user stories and additional training opportunities to support Teams users at Microsoft.

- **Improve deployment from employee feedback.** As people continue to use Teams, we are gauging its effectiveness through the feedback we receive. This helps us identify feature additions or changes, develop additional guidance and training, and adjust Teams implementation, when necessary. We also make sure that training and support is relevant to our people, so they can use the product to the best of their ability.

- **Identify user stories.** User stories help us show our people how their peers are using Teams. Stories also help us identify active Teams users that can be champions for the product in their realm of influence at Microsoft. We try to get a cross-section of stories that are relevant across the organization. These stories evolve based on implementation and needs of the business, and we continue to listen for new stories.

- **Continually assess and improve processes.** We are continually assessing all processes around Teams. We found that some things in our general processes worked well at the start of the adoption process but didn't work as well later on or once our deployment reached global audiences and employees in the field. It's a continual process of assessing and improving.

- **Stay informed on product and feature changes**. We track feature updates and potential changes in Teams. This helps us understand how new features affect our use cases, so we can best determine how to implement them.

- **Develop support for ongoing use cases and a maturing user base.** As people get more familiar with Teams, they find new ways to be more productive and collaborate efficiently. We've found that the more empowered our employees are to embrace Teams, the more they find their own ways to incorporate Teams into their workflow.

Recognizing Teams adoption as social and behavior change

Harnessing employee ingenuity is critical to the overall success and relevance of a business. Working together, people generate more ideas and feel more connected to their work, which improves engagement and retention. Our employees are increasingly mobile and need to have resources and tools available wherever they go. To meet the needs of this changing modern workplace, Teams was built as a chat-based workspace in Office 365, with persistent chat, easy file access, customizable and extensible features, and the security that teams trust. We've started using Teams to streamline communication, improve collaboration, and get more done together.

However, successful Teams adoption is not just technology adoption; it represents a change in behavior. Teams is more than a product—it is a fundamentally different way of working. This change is about people. We found that adoption was as much about social and cultural changes and challenges as it was about technology and tool implementation. Adopting Teams is a different journey than we've asked our people to take in the past. With Teams, we asked them to make four fundamental shifts in behavior:

- **Chat instead of email.** Move away from email as a primary method of communications for fast-moving teams and project management.
- **Live in the cloud.** Use all Office 365 components in the cloud.
- **Embrace flexibility.** Empower them to embrace the flexibility of Teams for customization.
- **Work mobile.** Help people to work in whatever way and place suits them best.

To accomplish this journey, we needed to educate people by managing change and offering them readiness skills they may have never embraced for any other product rollout. Even if an advanced customer has these skills within their organization, the change to both collaboration and meeting scenarios can benefit from a fresh approach.

Establishing a communications framework: Spark, ignite, bonfire

Understanding that Teams adoption was about social and behavior change, we used the spark, ignite, bonfire communications framework to achieve our primary goals. This framework:

1. Captures the messages, placement, and methods of communication for a change.
2. Defines how these messages will be used to capture the attention of your audience and convert it to sustained interest and engagement.
3. Grows interest and engagement into new behavior patterns, cultural change, and sustainable business outcomes.

1 Select the right sparks
Sparks are the "what" of your campaign that help it catch fire.

2 Move to ignite
This is the "how" of the campaign that ignites action from your audience.

3 Add to the bonfire
Make your campaign a growing beacon of your IT organization's business success.

Figure 1. The spark, ignite, bonfire communications framework

Selecting our sparks

The sparks are the "what" of the campaign. They alert your audience to changes and opportunities, and they provide the small but vital beginnings of communicating change. The sparks for Teams, and how we used them are:

- **Identify your target audience.** Our primary audience for Teams is our entire organization. We wanted full engagement throughout Microsoft, but we knew that we would need to refine our communications depending on which of our main demographics we were trying to engage. We used work done in the past with *personas*, or common company roles and positions, which we customized for the Teams deployment. For each persona, we identified common tasks and work trends and identified how that persona might use Teams in their day-to-day work life. Personas include information about which part of the company the employee works in, their common methods of collaborative communication, and other information about any pain points they experienced and how likely they were to adopt new technology and workstyles. We used a segmented and staged approach to control the velocity of adoption and ensure our adoption processes were as refined as possible.

- **Define your key message(s)**. We wanted a key message that would speak to our target audience. In an audience as broad as Microsoft, we used several key messages that were focused enough to generate interest and engage our employees. Our key messages included:

  - Chat for today's teams. Communicate in the moment and keep everyone in the know.
  - A hub for teamwork. Give your team quick access to everything they need right in Office 365.
  - Customize for each team. Tailor your workspace to include content and capabilities your team needs every day.

- **Choose the best channels.** We needed to choose where and how we were going to get our key messages out. We chose a combination of physical and geographical placement alongside digital placement to ensure that we reached the global Microsoft audience in the most effective and cost-efficient manner. These included:

  - **Internal website.** We used CSEWeb, our internal SharePoint portal for IT self-help for several pieces of adoption communication. It was the central location for all learning materials, content, and internal announcements about Teams. It also contained FAQs, explained the need for change, and provided a high-level roadmap. It hosted user stories that showed Teams adoption successes.
  - **Readiness and gamification.** We are creating quizzes and other gamified tools and messages to engage employees. We use small, "snackable" content to make it quick and easy for our people to learn more about adopting Teams.
  - **Social campaign.** We used social networking platforms within Microsoft to get our spark messages out to employees and share user success stories. Yammer gives us a huge opportunity to reach our users. We use it for marketing messaging, user engagement, and answering user questions. It gives us a ready means for social engagement within our organization.
  - **Personal targeted communications.** We selected specific audiences to be leaders and encouragers of Teams adoption. Our Sales group was a big one, because they constantly operate in a highly communicative, dynamic workspace. We used personas to make sure our content and approaches met the needs of many different users and addressed different challenges across different user groups. We also told real user stories about people in different roles, so employees could identify with the use case and apply the lessons to their role.
  - **Email.** We used email to communicate critical upcoming changes that would affect the way employees use Teams and the services that Teams was replacing.
  - **Signage.** We also adopted traditional methods to put Teams in front of our employees. This included signage on campus roads and in campus buildings. We used digital displays on our campuses to reinforce key messages, highlight learning resources and opportunities, and highlight new features.

Moving to ignite

This is the "how" of the campaign. Ignite is designed to convert immediate attention into short-term focus and initiate the adoption steps. We combined our sparks into an ongoing engagement that ignited action from our audience. During the ignite process, we used the following tasks to circulate our sparks:

- **Build a communication and readiness plan.** We built our communication and readiness plan based on our assessment of our employees and the communication specifics we created with our sparks. We created an internal launch event. The goal was to build awareness and excitement around Teams. The launch kicked off a months-long campaign that included many different channels and approaches.
- **Create a detailed communications schedule.** Part of the planning process included scheduling monthly themes and scheduling out the major elements of our plan. For example, when would we offer in-person training at our main campus in Redmond, and when would we begin rolling out training around the world? We aligned to the product roadmap so we

could promote new features as they were released. We also looked at opportunities to partner with other corporate events. For example, we gave participants in the annual Hackathon guidance about how to use Teams to collaborate while hacking. Event organizers put the guidance on the hacker resource site.

- **Produce creative content for sparks.** We created several types of content to reach our users, both detailed and brief. We also created readiness and learning material that was suited to different learning styles.

    - We created user stories to tell real-live success stories from Microsoft employees in different roles across the company.
    - We developed readiness content in the form of both Work Smart guides and web content to help employees who want step-by-step instructions.
    - We produced visual promotional assets to catch employee attention: digital signage, physical signage, online promos for major internal portals, and Yammer posts with visuals and links to more information.
    - We developed content for in-person and online learning sessions and delivered them on campus. We also gave presentation decks and train-the-trainer sessions to training teams managed by our IT Site Operations teams around the world so the sessions were up to date on the product and messaging was consistent.
    - We developed a variety of readiness content. Having readiness content available in different formats is important to suit different learning styles. We had written guides, in-person training, and learning videos.

- **Manage campaign execution.** Our campaign team worked together to ensure that our communication was being received effectively and the tools we put in place were understood and used properly.

    - Sometimes we had to adjust our approach mid-flight; for example, if we weren't seeing attendance numbers we wanted for training, we'd look at new, creative ways to get the word out.
    - We also listened for feedback and ideas from our users and trusted stakeholders and adjusted, as needed.

- **Generate and review campaign reports, to see progress compared to goals.** We used several reporting tools and metrics to gather and measure the success of Teams adoption throughout the organization.

Throughout the campaign, we tracked our adoption progress, and focused on growth among weekly active users. We regularly published a report to stakeholders that also looked at the effectiveness of our various channels: web traffic, promo click-throughs, training attendance, training satisfaction surveys, Yammer activity, and how often questions on Yammer were answered.

Adding to the bonfire

Every change communication or campaign should feed the bonfire, which is a constantly growing beacon of the success of Teams adoption here at Microsoft. As successes are achieved and advertised, the bonfire helps to:

- Achieve sustainable business outcomes.
- Drive cultural change within the company.
- Establish social norms that encourage taking quick action.
- Draw people to act and connect in new ways.

The most important aspect of the bonfire is that it adds to and integrates with the organization's high-level technology and culture strategy. Our Teams campaign was a piece of a bigger approach to modern workplace communication and readiness. We provided clarity on "what tool when" for our employees to help them understand how Teams fit into the bigger picture and how we envisioned Teams fitting into their workstyle.

Lessons learned

During Teams adoption, we did our best to be aware of the process, learn how we could improve the process during adoption, and provide lessons that could be applied to future adoption and change management initiatives at Microsoft. Here are few of the things we learned.

- **Capitalize on the reach of your marketing campaign.** Our initial strategy was in person, getting Teams in front of key users and working with them. While it was time-consuming, we found later that were able to reach field and global audiences using virtual methods to broaden our reach. We missed some opportunities to capitalize on early mover enthusiasm within those audiences and found some champions who were creating and sharing their own content.

- **Understand the primary use cases for your organization.** We approached our people by identifying personas within our organization that defined the most common ways Teams would be used. This included not only typical daily use scenarios, but also deeper, scenario-based guidance to help people make the right decision.

- **Understand toolset and appropriate-use scenarios.** We discovered that directly addressing what tool our users should use for common collaboration tasks helped ease the transition and curb confusion. Directed use gave employees a starting point and then enabled us to measure, through feedback, whether changes or adjustments were needed. At the beginning of the campaign, we didn't give people a lot of specific guidance, which hurt general adoption. Later, we developed guidance for specific use cases and developed step-by-step guides to take users through important and common tasks, which left them more empowered and engaged with Teams.

- **Understand the impact of Teams on your existing collaboration and teamwork tools.** During adoption, we learned that there were times when users weren't sure what features were available, or if they could or should use a feature— especially when it worked like something they were already using. In contrast, we had a business group that had not used Skype before. We focused on essential scenarios and offered very clear guidance. Because they had not been Skype users, the change management strategy and focus had to be different.

- **Align new capabilities and features to your organization's strategy.** We found that our Teams adoption needed to be targeted and molded for our vision of transparent communications and open collaboration. Align capabilities to your business strategies rather than allowing technology to direct your strategy.

- **Understand your audience.** We originally looked at our users in a group, typically organized by work roles. This worked well for several parts of the adoption process, but we failed to look closely enough at secondary groups of users based on factors like age, workstyle, and geography. Once we examined these secondary groups, we found a new set of use cases and scenarios that helped us penetrate even deeper into our user base.

- **Plan for executive sponsorship.** In the middle of the campaign, we realized that we didn't adequately involve leadership to help drive Teams adoption. We weren't giving our leadership guidance that was specific or simple enough that they could use it easily. Once we created guidance and a toolset for them to help champion Teams, they were much more engaged and willing to put their effort into Teams adoption within their scope of influence.

For more information

Microsoft IT Showcase

microsoft.com/itshowcase

Getting started with Teams

For more in-depth guidance on Teams adoption

Teams product page

Case guidance booklet

Deploying Microsoft Teams streamlines collaboration and improves teamwork