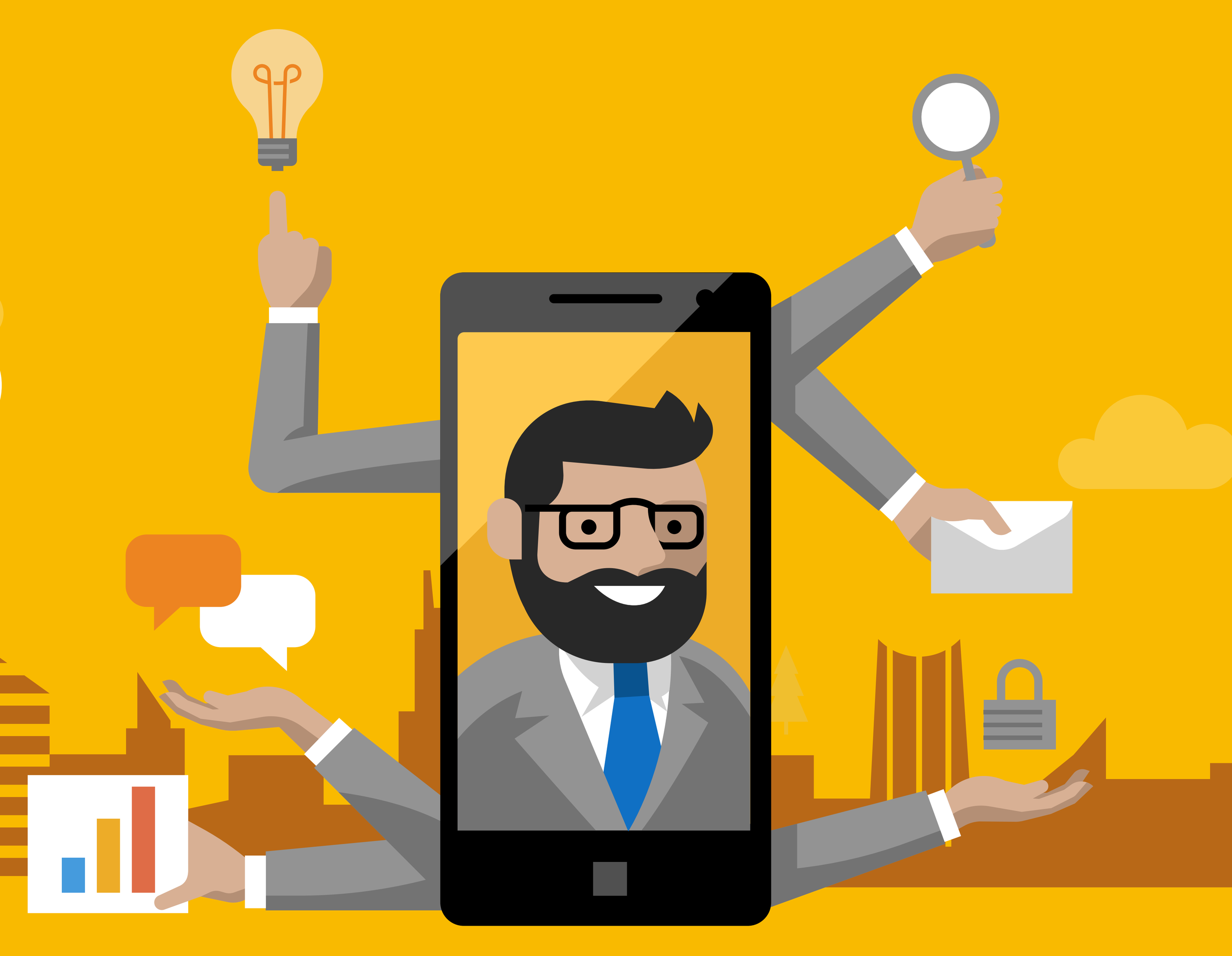
THE 7-STEP PARTNER MINI-GUIDE TO ONBOARDING CUSTOMERS



Digital collaboration has become one of the staples of today's modern workplace. With it, organizations have not only increased their productivity, but also created a more flexible and satisfying environment for their employees. Yet many organizations still hang on to legacy and on-premises applications, so it's our job to inform them of how Microsoft Teams can greatly benefit their business.

This infographic provides you with a step-by-step cheat sheet to quickly and easily onboard new customers to Teams. Use it to line up stakeholders, define common use cases, establish successful criteria, create Teams, find Teams champ program resources, create a communications and training plan, and review your business objectives.

STEP 1 | Setting up your stakeholder community

Make sure that your customer stakeholders are the people who need to be involved in the deployment of Microsoft Teams. Some stakeholder groups may include:

- Executive Stakeholder: guides the customer's digital transformation.
- Project Lead: oversees managing deployment and launch activities.
- Teams Champions: identify customer use cases and champion the use of Teams within their organization.
- Helpdesk Coordinator: provides training that will enable helpdesk staff to respond to inquiries and address issues as they arise.
- Office 365 Admin: enables and configures global policies for Teams.
- Change Management Team: provides training and readiness resources to support the adoption of Teams across the enterprise.

STEP 2 | Define use cases

Once you've identified your stakeholders, you can begin setting the scope and approach of the engagement. This will ensure that you have the right use cases in mind when generating user activities.

Pro tip: work with the Project Lead to create a survey to understand how the customer's users work. Be sure to ask the following questions:

- What applications do you use daily to get work done?
- How many virtual teams do you work on?
- Which departments or divisions do you work with the most?
- How do you like to communicate and work with others?
- How do you find people who can help resolve roadblocks?
- What result would you most like out of Microsoft Teams?

STEP 3 | Establish success criteria and KPIs

After the use cases are defined, it's crucial to establish clear business scenarios where you can effectively determine success and obtain relevant metrics. These are some examples of key performance indicators (KPIs) you could recommend to your customer:

- Technology adoption rate
- Employee satisfaction
- Training effectiveness
- Operating cost reduction
- Productivity growth

STEP 4 | Create teams and channels

Microsoft Teams allows individual teams to self-organize using teams and channels, and both can be customized to meet your customer's requirements.

These are some of our recommendations for setting up teams, channels, and apps by department type. All of them can be tailored to your customer's needs:

- Sales
- Public Relations
- Marketing/Go to Market
- Technical Operations
- Product Team
- Finance
- HR
- Cross-organizational Virtual Team

STEP 5 | Develop a champions community

Gaining buy-in from every user across an organization is challenging—champions can help alleviate this challenge. They play an important role in nurturing adoption, reducing strain on the resources of the core project team, and driving engagement throughout the organization by:

- Identifying business challenges and customer use cases.
- Creating the groundswell and enthusiasm that grows adoption of improved ways of working.
- Building a circle of influence among their teams.
- Bringing new ways of working to life across teams.
- Providing feedback to the project team and sponsor.

STEP 6 | Create a communications and training plan to help launch Teams

To help guarantee an optimal launch of Teams and pave the way for widespread adoption, work with your customer's Project Lead and Change Management Team to establish a pilot team as well as create the necessary communications and training plans. The minimum steps for success with pilot teams are:

- Hold regularly scheduled meetings with project stakeholders for updates.
- Use a feedback method to gather information from people participating in the pilot.
- Make self-help documentation available, including product videos.
- Hold a kick-off meeting with the pilot users to get them excited about their participation.

STEP 7 | Review and iterate success metrics and KPIs

Finally, always check that your customer's Teams rollout is achieving the desired results and business objectives by gathering feedback and evaluating progress against the metrics and KPIs that were previously established.

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