Preface

The way that people connect in their personal and professional lives has fundamentally changed in the last few years – the world has become one giant network. People now expect to be able to get things done at work in the same way. Office 365 allows your organization to become more connected, collaborative and structured in how work gets done. But it can only do that if you take the people in your organization on that journey with you.

This guide has been created for organizations looking at the most effective ways to leverage their investment in Office 365. It is meant to be used as a step-by-step guide, whereby you can ensure that your organization can first identify, and then execute specific tasks that will have the greatest positive effect on your organization.

Microsoft has harnessed years of experiences of working with Office 365 customer journeys, to create a usable guide, based on real-world experiences, from real-world companies.

We hope it inspires you with what is possible, and that you use and share it with the people in your organization. We welcome your feedback on it, through the Drive Adoption Community at:

http://aka.ms/driveadoption

And remember, you are not in this alone. There are thousands of organizations just like yours who are currently launching Office 365 and you can connect with them in this community.

Change the way you work, because the way you work impacts the work you do.
Achieving success with Office 365 means making sure it helps everyone in your organization achieve more with their work.

Before rolling out Office 365, take a step back and think about why your organization purchased it in the first place. Was it led by specific technical requirements, as part of the IT upgrade cycle, or did you discover specific needs within the business?

Driving adoption comes from the understanding of your business challenges and addressing these with Office 365 solutions. It is about ensuring that people across your organization understand the benefits and embrace the solutions you provide. People naturally resist change, so they need to know what’s in it for them.

At Microsoft, we want you to make the most of your investment in Office 365 and planning is key to achieving this. The sole purpose of this Adoption Guide is to assist you in the adoption process. It has been separated into three key phases:

Phase 1: Envision
Identify key stakeholders, assemble your team, identify and prioritize Business Scenarios, and collaborate with key stakeholders to create a Success Plan for the adoption of Office 365 in your organization.

Phase 2: Onboard
Execute your Success Plan to onboard your organization to the technology, and help your people work in a new way. Start with an early adoption program and then expand to cover your whole organization.

Phase 3: Drive Value
Realize ongoing value from your Office 365 investment by continuing to boost user engagement and drive adoption. Manage and prepare for change by measuring and sharing the success of Office 365, while understanding where to iterate for future improvements.

Learn more about the critical success factors impacting Office 365 adoption:
https://go.microsoft.com/fwlink/?linkid=843793
FastTrack
We’ll get you there with the FastTrack Center

The FastTrack Center is a team of hundreds of engineers who are committed to providing IT professionals and partners all over the world with the best Office 365 experience.

If you are an Office 365 customer with at least 50 licenses on an eligible plan, you can request onbonarding to receive remote and personalized assistance. Our FastTrack engineers will help you plan your Office 365 project, assess your technical environment, provide remediation guidance, migrate data to Office 365* and provide user adoption assistance.

Meet the FastTrack Center Video: http://aka.ms/meetfasttrack

Moving at the pace of change, and not breaking the business was really important to us. Our partnership with the FastTrack team was fantastic. They helped us work through lots of our onbonarding challenges, as well as strategically how to setup our business processes and business change.

– Omar Bhatti Senior Principal, CSC

* Migration services available for customers with 150+ eligible licenses
Phase 01.

Envision

Assembling the correct team and ensuring that you have a list of business goals that you want to achieve with the help of Office 365 is very important throughout your launch and rollout planning. This is how you make Office 365 relevant to your people and it will also help secure buy-in across your organization.

In this phase, you will learn how to select the right people within your organization to help achieve success with Office 365, create your own list of Office 365 Business Scenarios, and create a Success Plan directly aligned to achieving your specific business goals.
Step 01.
Identify Key Stakeholders and Assemble your Team

The first rule of a successful adoption is to create a dynamic team comprised of key stakeholders and the right people that can drive and effect change in others. A successful adoption strategy starts with a team of committed individuals representing a cross-section of your organization.

Use the table to understand the different stakeholders and their role and responsibilities in a successful Office 365 rollout.

To understand the key roles, what's required from your team and why they are needed, go to:

https://go.microsoft.com/fwlink/?linkid=843791
### Key Roles

<table>
<thead>
<tr>
<th>Role</th>
<th>Responsibilities</th>
<th>Department</th>
</tr>
</thead>
<tbody>
<tr>
<td>Executive sponsor</td>
<td>Communicate high-level vision and values of Office 365 to the company</td>
<td>Executive Leadership</td>
</tr>
<tr>
<td>Success Owner</td>
<td>Ensure the business goals are realized for an Office 365 rollout</td>
<td>Any Department</td>
</tr>
<tr>
<td>Champions</td>
<td>Help evangelize Office 365 and deal with objections from end users</td>
<td>Any Department (Staff)</td>
</tr>
<tr>
<td>Project Manager</td>
<td>Oversee the entire Office 365 launch execution and rollout process</td>
<td>Project Management</td>
</tr>
<tr>
<td>Training Lead</td>
<td>Manage the training program and/or resources for your Office 365 rollout</td>
<td>IT and/or Human Resources</td>
</tr>
<tr>
<td>Department Leads</td>
<td>Identify how specific departments will use Office 365 and encourage engagement</td>
<td>Any Department (Management)</td>
</tr>
<tr>
<td>IT Specialist</td>
<td>Oversee all technical aspects of the rollout</td>
<td>IT</td>
</tr>
<tr>
<td>HR Manager</td>
<td>Integrate Office 365 into HR processes and manage HR content on Office 365</td>
<td>Human Resources (Management)</td>
</tr>
<tr>
<td>Communication Lead</td>
<td>Oversee company-wide communications about Office 365</td>
<td>IT and/or Corporate Comms</td>
</tr>
<tr>
<td>Community Manager</td>
<td>Manage day-to-day Yammer network activity; provide guidance and best practices</td>
<td>IT and/or Corporate Comms</td>
</tr>
<tr>
<td>SharePoint Site Manager</td>
<td>Help manage SharePoint site strategy for the organization, serve as the link</td>
<td>IT and/or Staff</td>
</tr>
<tr>
<td></td>
<td>between business side and IT</td>
<td></td>
</tr>
</tbody>
</table>

### Warning

Keep in mind that each of these roles are guidelines. Depending on the size and makeup of your organization it is possible for these roles to overlap or not be necessary.

### Tips and Tricks

1. It's OK to have people on your team performing more than one role.

2. It is important to secure executive sponsors when you identify the important stakeholders within your organization. If you have the leadership team and key stakeholders on board, there will be significant business commitment to sustain momentum and achieve end-user adoption.
Executive Sponsors are key leaders within the organization and their participation is essential in driving employee adoption. They have the greatest influence on company culture and can actively communicate the value and benefits of a new technology and way of working throughout the organization. They can also provide a crucial understanding of the key business goals and common challenges to overcome - which is where Office 365 comes in.

Executive Sponsors set the overarching business goals.

Research indicates that transformation projects are more successful when there is a visible executive sponsor. Over 85% of respondents indicated that when the CEO was either fairly or very visible, the transformation project was either very successful or extremely successful.

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Executive Sponsors should:

- Help the project team identify and prioritize which Business Scenarios should be used
- Play a role in communicating how the organization plans on using Office 365 to achieve its business goals to other leaders across the organization
- Actively participate and use the Office 365 capabilities to help drive adoption across end users and reinforce desired behaviors

For more information about how an executive sponsor can contribute to the successful roll-out of your Office 365 project, see

[https://go.microsoft.com/fwlink/?linkid=843791](https://go.microsoft.com/fwlink/?linkid=843791)

Tips and Tricks

When identifying your sponsors, consider including key stakeholders across different lines of business being impacted by the change.
Ensure your executive sponsors understand the ABCs

**Active and visible participation**

**Building a coalition with their executive peers**

**Communicating directly with employees**
What are Success Owners and why are they important?

Setting Success Owners within your organization is important to ensure the business goals set for Office 365 are realized. They are responsible for ensuring people use the service and get value from it.

Success Owners should:

- Ensure people use and get value from Office 365
- Help ensure the right stakeholders are involved
- Translate the business goals your organization has set for Office 365 into Office 365 scenarios
- Ensure communications and training are successfully implemented
What are Champions and why are they important?

Creating and leveraging Office 365 Champions within your organization is another important stakeholder group in driving Office 365 adoption.

Gaining buy-in from every user across an organization is a challenge. Champions can help alleviate this challenge and play an important role in the adoption of Office 365. They are knowledgeable, committed to furthering their expertise and are willing to provide peer coaching and assistance. They help translate Office 365 into the reality of their department or team.

Champions should:

- Evangelize Office 365 and its value across teams
- Help people in their team understand what is in it for them
- Build awareness of Office 365 through informal communication channels
- Assist in welcoming new users, providing guidance and sharing best practices
- Provide feedback to project team regarding user engagement and adoption

Build Your Own Program

For more resources and materials to help you build your own Office 365 Champions, download this guide:

https://go.microsoft.com/fwlink/?linkid=843794
Using Office 365 to Collaborate with Launch Team Members

Using various Office 365 apps and services throughout the planning and execution of your rollout can add to its success. You should consider doing this to get the team familiar with the service so they can effectively evangelize it to colleagues. Some examples include:

- Use Office 365 Groups to plan your project and collaborate on documents related to your Office 365 implementation
- Use Microsoft Planner for day-to-day task management of your Office 365 implementation project
- Use Yammer to build, ready and support your Office 365 Champions community
- Use Skype for Business to conduct online meetings with your project team, capturing meeting minutes in Microsoft OneNote

I have been most gratified by the way the whole organization came together to achieve this global transformation.

We had dedicated teams that did a lot of planning up front. And Yammer proved itself as a perfect grassroots change agent; teams formed dynamically and worked alongside the implementation groups in each country. Conversations started all over the place, and this turned out to be a fantastic channel for end-user support.

By the time the Office 365 deployment was complete, I wondered how we could have got on without this tool.

– Andy Tidd, CIO, ABB
Step 02.
Identify and Prioritize Business Scenarios

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

Why Business Scenarios are important:

- With clear Business Scenarios, you can effectively measure success and realize tangible results.
- Help teams understand how Office 365 can help them achieve more.
- Business Scenarios can help with awareness and readiness activities by putting the products in context; people will know when and how to use them.
Find Business Scenarios with the Productivity Library

We have compiled many Business Scenarios within our Productivity Library to help you discover ways to use Office 365 that can be impactful to your organization.

http://fasttrack.microsoft.com/office/envision/productivitylibrary
Lean on other’s experience. Join the community!
As a part of the Driving Adoption Community in the Microsoft Technology Community, you can talk to thousands of other Microsoft customers and understand what scenarios have worked for them.
What's in it for me?

- Product Updates
- Connect with Engineering
- Collaborate with Peers
- Build Relationships
- Additional User Resource
- Lean on Other's Experience

Start talking to peers today – join the Driving Adoption Community
http://aka.ms/driveadoption
Identify Business Scenarios

To identify the right Business Scenarios, it’s best to involve the people who are going to drive and support the change throughout the organization. You’ll want to run a few workshops inviting the department leads, project managers, IT and other stakeholders who can help brainstorm how Office 365 can be used in your organization. The following questions are a great starting point to identify your Business Scenarios:

- What are some of the organization’s challenges relating to communication and collaboration?
- What are the areas in which your organization would like to improve?
- What are the organization’s strategic initiatives or current transformation projects that Office 365 can support?
- What methods of communication and collaboration are typically better received by your organization than others?
- What is the process for drafting, distributing, and sharing information?

Office 365 delivers the technology to improve international communication and collaboration. We use video conferencing, presentations, and desktop sharing to work with our partners.

– Klaus Huelsewiesche, Head of IT Systems for R&D, Laundry and Home Care at Henkel
Not sure how to begin?

To begin to form your own Business Scenarios, consider using the following framework:

- As someone in [TEAM]
- I want to [DESCRIPTION OF WHAT I WANT TO DO]
- Using [SPECIFIC APPLICATION OF THE TECHNOLOGY]
- I’ll know this is successful when [SOLUTION SUCCESS MEASURE]
Prioritize Business Scenarios

As Office 365 can make a positive impact right across your business, it is important that you prioritize your many Business Scenarios to ensure that you understand where to place your focus first.
How to Prioritize Your Scenarios

Refer to the graph below and plot your Business Scenarios on the chart according to the level of expected impact on the organization and how difficult it is to achieve. Here, you can understand what scenarios will provide the highest level of impact the fastest, and also help to determine the harder projects that may be important, but will need more planning.

Tips and Tricks

It’s helpful to think about what is going to deliver the most value to your people first. Some of the things you might think of doing right away (e.g. mail migration), might not deliver immediate visible value. It might be worth focusing on getting quicker, visible wins first (e.g. getting everyone access to instant messaging).
Define Your Success Criteria

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 Office 365 rollout.

**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 Office 365. Establish your KPI benchmarks and baseline your user’s current knowledge of Office 365

- Choose criteria that will help you showcase the impact Office 365 is having on your organization to the leadership team
Use the SMART Mnemonic to Guide You

As you draft your success criteria, use the SMART mnemonic to guide you in setting goals that are impactful:

**Specific:**
Clear and unambiguous; answers the questions, “What, why, who, where?”

**Measurable:**
Concrete; clearly demonstrates progress.

**Attainable:**
Realistic; not extreme.

**Relevant:**
Matters to stakeholders.

**Timely:**
Grounded to a specific target date; answers the question, “When?”
### Success Criteria Examples

<table>
<thead>
<tr>
<th>Success Criteria</th>
<th>Method/Source</th>
<th>Metrics</th>
<th>Example Goal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increased adoption</td>
<td><strong>Quantitative</strong></td>
<td>Mailbox usage</td>
<td>Comparison of pre- and post-rollout usage reports will show increasing adoption of 10% per month.</td>
</tr>
<tr>
<td></td>
<td>Office 365 reports</td>
<td>SharePoint usage</td>
<td></td>
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<td></td>
<td></td>
<td>Skype for Business IMs and conferences</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>Minutes of Skype for Business audio used</td>
<td></td>
</tr>
<tr>
<td>Training effectiveness</td>
<td><strong>Quantitative</strong></td>
<td>Mailbox usage</td>
<td>Comparison of pre- and post-training usage reports will show increasing adoption per month. Employee net user satisfaction score is 130+ based on the final training survey.</td>
</tr>
<tr>
<td></td>
<td>Office 365 reports</td>
<td>SharePoint usage</td>
<td></td>
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<tr>
<td></td>
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<td>Skype for Business IMs and conferences</td>
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<tr>
<td></td>
<td></td>
<td>Minutes of Skype for Business audio used</td>
<td></td>
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<tr>
<td></td>
<td><strong>Qualitative</strong></td>
<td>End-user surveys</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Yammer groups and feedback</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reduced operating costs</td>
<td><strong>Quantitative</strong></td>
<td>Mailbox usage</td>
<td>Comparison of pre- and post-Office 365 reports will show cost savings. Post-roll-out usage of third party phone conferencing should show decreasing usage of 10% per month.</td>
</tr>
<tr>
<td></td>
<td>Office 365 reporting</td>
<td>SharePoint usage</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Finance/accounting</td>
<td>Audio conferencing billing</td>
<td></td>
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<tr>
<td></td>
<td>reports</td>
<td>and usage</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Travel and phone</td>
<td>Travel and phone expenses</td>
<td></td>
</tr>
<tr>
<td></td>
<td>expense reports</td>
<td>Help desk calls</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Output measures</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Increased productivity</td>
<td><strong>Qualitative</strong></td>
<td>Time required to complete projects</td>
<td>Time to complete customer orders should drop by 15% within 6 months.</td>
</tr>
<tr>
<td></td>
<td>End user surveys</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Yammer groups and feedback</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Improved collaboration</td>
<td><strong>Qualitative</strong></td>
<td>Employee satisfaction</td>
<td>Teams that work from multiple locations will report improved feelings of connection with their teammates within 3 months of the Skype for Business roll-out.</td>
</tr>
<tr>
<td></td>
<td>End user surveys</td>
<td>Time saved</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Yammer groups and feedback</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Improved employee satisfaction</td>
<td><strong>Qualitative</strong></td>
<td>Employee satisfaction</td>
<td>Employee satisfaction improves by 15% within 6 months.</td>
</tr>
<tr>
<td></td>
<td>End user surveys</td>
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<td></td>
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<tr>
<td></td>
<td>Yammer groups and feedback</td>
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</tbody>
</table>
Step 03. Create a Success Plan

A Success Plan is critical to your rollout as it provides you with a roadmap to realizing your goals with Office 365.

How to create your Success Plan

01. Log into the FastTrack site using your Office 365 organization ID. [http://www.fasttrack.microsoft.com](http://www.fasttrack.microsoft.com)

02. Click “Start a new plan” to get going on your Success Plan.

03. Click the “Business Case” tile on the Success Plan home page.

04. Select Business Scenarios

05. Enter Success Criteria under “Benefits”

06. Add project stakeholders to the plan on the “Team” tab.
When planning your adoption effort, it is important to have a view that extends past your initial launch. Many organizations treat end-user adoption as an afterthought, as it is a common belief that new technology will simply be used if it is available. However, it needs to be thought of as the foundation that you can build upon. People can be resistant to change, which makes this step critical to plan for and initiate in parallel with your technology deployment planning – so keep it up! You are on your way to creating a great Success Plan.

Typically, only 34% of users are willing to use new technology rollouts

CIO Executive Board Business Productivity Database

Common approach

End-user focus is an after-thought. For instance ‘an email with a link to training’

Ideal approach

End-user adoption is a parallel, integrated work stream with deployment
There are a range of activities, templates, event and training tips that will help you in planning for a successful Office 365 adoption. While it is ideal to utilize each of these resources to achieve maximum adoption, we understand that it is not always practical based on timelines and resources.

You will see both critical activities and some additional activities we’d recommend for optimal results.

Customer Success Story

Henkel: Adoption Excellence

Learn how Henkel planned for Office 365 success

http://aka.ms/adoptionexcellence
Communication & Awareness

Use a communication strategy to generate awareness and excitement. Before the service becomes available, you want your people to be excited by the fact that it is coming, and then keep them interested in using it after you’ve launched.

→ Ensure you take into account your staff when putting together the messaging, as you need to help them identify “What’s in it for me?”

→ Pick a mix of activities including email, posters and physical events (maybe even cupcakes!) and plot them out along the timeline of your project

→ Schedule events where people can touch the products and ask questions

→ Tailor your activities of driving awareness to your company and culture

→ Having a leader send out a communication announcing O365, kick off a launch event, or share the benefits during an all-hands meeting will go a long way in validating its importance and getting everyone onboard with using the new technology

Help Desk Readiness

Use this guide to help get your help desk ready to troubleshoot any Office 365 issues or questions that your users may have.

https://go.microsoft.com/fwlink/?linkid=843799
Critical Success Activities

**Posters, booklets and print**

- Collaborate on content
- Get it done from anywhere
- Work together seamlessly


**Countdown and Announcement emails**

- Welcome to your new Office
- Stay connected on the go
- Do more with email


**Tips and Tricks email series**

- Get more done, together
- Access and share files from anywhere
- Anywhere access


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Step 03: Communication & Awareness
Launch Events

How to choose your launch event

- Consider your goals for using Office 365. How can your launch event support these objectives and these particular parts of the business?
- Consider your company culture. What types of activities will resonate with your leadership and your employees?
- Consider your time and resources. Can you mix and match different event activities to plan something that suits your needs and fits into your schedule?
- Consider existing company events. Is there an upcoming company event near the roll-out of Office 365 that could incorporate your launch?

Resources and tactics for an effective launch

We have put together some resources, ideas and tactics to help you create an effective Office 365 launch below.

- Planning Team and Champions wear Office 365 t-shirts, order at https://www.co-store.com/ (US customers only)
- Office 365 banners, posters and leaflets displayed throughout the offices
- Demo booths in cafeteria/foyer to showcase the various Office 365 tools and features, and to provide hands-on experience
- Run online engagement events using Skype Meeting Broadcast for team members in remote offices
Training

Get people up and running quickly! Training is critical to ensure that new users have the knowledge and information necessary to get the most out of Office 365. The “Why?” should be the most important aspect of your training. If your end users are new to Office 365, your training should do more than simply introduce them to procedural “how-to” information for performing tasks. They need to know why the change is happening, what’s in it for them, and why they’re being asked to change.

When you are putting together your training program, you will need to take into consideration:

- The current productivity system you are running
  If you are currently running a productivity system, you may need to spend an increased effort in the training stage, as it will require a change in behavior

- The technology literacy of staff
  You need to understand how tech-savvy your staff are when planning your training program. This will help to determine how easily they will pick up new ways in which to work

- Other initiatives that are concurrently running in the business
  It is important to understand what other programs are currently running in the business to ensure that you are not overwhelming your staff and there isn’t any confusion with the learning of new ways to work

- The best way of delivery
  It is important to understand what is the best way to deliver specific training for your organization, whether it be through consumable microlearning, in-person or through assisted or unassisted online tutorials
Step 03: Training

Critical Success Activities

Product Training
Product based training to help ready your people to use the services and apps effectively:

- Available online
- Article style
- Snackable in size
- Detailed in approach

Productivity Training
Scenario based training to ready your people to maximize their productivity with Office 365.

- Video Training
- Scenario-based
- Straight forward
- Using plain language

Quick Start Guides
Product Specific Quick Start Guides serve as a concise introduction to the basics of the updated versions of Word, Excel, PowerPoint, Outlook, and OneNote for Windows PCs.

- Card based
- Customizable
- Short, simple, and easy to consume
- Provides first-day activities, setup, sign-in, next steps
- Cover top 3-5 tasks

Office Training Center Bill of Materials (BoM)
Use this to help pinpoint exactly what you need among all of the available training content.

- Provides first-day activities, setup, sign-in, next steps
- Cover top 3-5 tasks

http://aka.ms/quickstart
http://aka.ms/o365producttraining
http://aka.ms/productivitytraining
http://aka.ms/officebom
Build a Champions Program

Champions are passionate and excited to evangelize and help their peers learn more effective solutions. They can help reduce the strain on the resources of the core project team and drive engagement throughout the community.

**Why are Champions important?**

- They create the groundswell and enthusiasm that grows adoption of improved ways of working
- They build a circle of influence amongst their teams
- They bring the new ways of working to life across teams
- They identify business challenges and possible solutions
- They provide feedback to the project team and sponsors

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I am the power user. I’m trying to keep it going so others will do the same. It’s about sharing ideas.

– Paul

It’s a matter of finding those people who are motivated. I see it as an opportunity. Part of my job is to encourage community and knowledge sharing.

– Darren
How to build a Champions Community?

- Find enthusiastic Champions who can commit time and effort
- Build a Yammer group for Champions to share updates and successes
- Give lightweight training on core elements of Office 365
- Provide materials ready to support their work on the ground with teams and individuals (e.g. brown bag sessions)
- Ensure a regular rhythm for discussions with the Champions on what’s working and what’s not
- Design a program to engage and recognize their effort, such as providing privileged access to relevant events, or speaking engagements
- Communicate to individuals about the Champions role and where they can be found—remember they are not an IT support function but business representatives

We connect with an adoption champion in each business unit, who sends out weekly emails on Office 365. Each Office 365 tool has core benefits, and by taking users on a smooth journey through them, we are able to unlock the value in each one.

– Nick Lamshed, Change Manager, Qantas

Tips and Tricks

Make the Champions program a must-have in your adoption plan. We’ve found that the most common and effective solution for people to learn is through their peers. Identify and approach those that are natural leaders or teachers within your organization, and use them as a base to develop your community.

https://go.microsoft.com/fwlink/?linkid=843794
Step 03: Additional Activities

Create a Yammer Group

Create a Yammer group (#O365win) for employees to share their Office 365 success stories, best practices and to get help with new features.

Training

Incorporate Microsoft’s Office 365 training resources into your own internal training site.

Contests

Contests are a great way to stimulate some healthy competition between departments across your organization, and helping drive adoption. Think about some of the features of Office 365 and how you can create contests, scavenger hunts, prizes and giveaways that encourage people to interact with Office 365.

Office 365 Teaser Video

Play the Office 365 teaser video at your launch event or on a recurring basis in your cafeteria or near elevators.

https://go.microsoft.com/fwlink/?linkid=844104

Find other videos at http://aka.ms/officevideo
# Office 365 Roll-out Timeline

<table>
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<th>Workstream</th>
<th>Phase 01: Envision</th>
<th>Phase 02: Onboard</th>
<th>Phase 03: Drive Value</th>
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</thead>
<tbody>
<tr>
<td><strong>Identify Key Stakeholders and Assemble Team</strong></td>
<td>Identify and recruit Success Owner and Project Manager</td>
<td>Identify and recruit Executive Sponsor(s), and fill remaining team roles</td>
<td><strong>Manage and prepare for change</strong></td>
</tr>
<tr>
<td><strong>Identify and Prioritize Business Scenarios</strong></td>
<td>Identify and develop Business Scenarios</td>
<td>Prioritize Business Scenarios</td>
<td><strong>Measure, Share Success, and Iterate</strong></td>
</tr>
<tr>
<td><strong>Define Success Criteria</strong></td>
<td>Define success criteria/key performance indicators (KPI) and establish KPI benchmarks</td>
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<tr>
<td><strong>Create Success Plan</strong></td>
<td>Begin capturing your project details in a Success Plan at <a href="http://fasttrack.office.com">http://fasttrack.office.com</a></td>
<td>Finalize your Success Plan</td>
<td><strong>Boost User Engagement and Drive Adoption</strong></td>
</tr>
<tr>
<td><strong>Build your Champions Program</strong></td>
<td>Identify and recruit Champions</td>
<td>Train Champions and brainstorm activities</td>
<td><strong>Training</strong></td>
</tr>
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<td></td>
<td>Create Yammer Group to support your Champions</td>
<td>Determine ongoing champion duties</td>
<td>Set up internal training site to store training resources</td>
</tr>
<tr>
<td><strong>Early Adoption Program</strong></td>
<td>Recruit program participants. Set up a Yammer group to make communication and feedback collection easy</td>
<td>Circulate a baseline survey to your participants. Provide participants with activated Office 365 account to formally begin your early adoption program.</td>
<td>Train end users</td>
</tr>
<tr>
<td><strong>Communication and Awareness</strong></td>
<td>Develop communications plan and engagement event strategy. Develop communications materials using the available templates.</td>
<td>Send a ‘countdown email’ to employees</td>
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</tbody>
</table>
To help you get started with planning your Office 365 rollout consider the timeline below. Make the necessary adjustments to build the right timeline for your rollout.

<table>
<thead>
<tr>
<th>Week 6</th>
<th>Week 7</th>
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<th>Week 9</th>
<th>Week 10</th>
<th>Week 11</th>
<th>Week 12</th>
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<tr>
<td>Get feedback from Champions and iterate program as necessary</td>
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<td>Send an Announcement Email to let users know what’s available. Execute launch engagement event.</td>
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<tr>
<td>Train end users</td>
<td>Setup ongoing training series</td>
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<tr>
<td>Prepare and run contests to continue encouraging user engagement</td>
<td>Send “Tips and Tricks” email to end users</td>
<td>Send “Tips and Tricks” email to end users. Circulate a post-launch survey.</td>
<td></td>
<td></td>
<td>Send “Tips and Tricks” email to end users</td>
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<td>Update and maintain internal training site</td>
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<tr>
<td>Share success stories</td>
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<tr>
<td>Periodically host additional engagement events</td>
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<td>Monitor the Office 365 Public Roadmap and Office blogs</td>
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<tr>
<td>Communicate to and ready end users for new feature releases</td>
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<tr>
<td>Collect and report on Office 365 success criteria and Key Performance Indicators (KPIs)</td>
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<tr>
<td>Capture and share success stories</td>
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<tr>
<td>Roll-out new Business Scenarios</td>
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</tbody>
</table>
We’ve seen a 73 percent increase in the adoption rate between doing nothing and running a structured user journey campaign

– Nick Lamshed, Change Manager, Qantas
Phase 01
Checklist

☐ Onboard your project team and get them excited to help their colleagues become more productive with Office 365

☐ Identify and Prioritize Business Scenarios

☐ Create your Success Plan on http://fasttrack.microsoft.com

☐ Complete your project timeline for rolling out Office 365 and begin executing your adoption activities
Phase 02.

Onboard

Now that you have created a solid Success Plan for the adoption of Office 365 in your organization, it’s time to begin onboarding to Office 365 and introducing your people to this new way of working.

The most successful technology implementations focus 80% of their efforts on people, and 20% of their efforts on technology. That is because with any new technology implementation, behavioral changes required of end users need to be managed to ensure success.

In this phase, you will begin executing your Success Plan to help your people through this change. Your IT team can utilize the FastTrack Center to complete the technical onboarding to Office 365.
Early Adoption Program

For a successful launch, start your Office 365 rollout with an early adoption program to gain some initial feedback and then continue that momentum when rolling out the program across your entire organization.

While completing the technical onboarding to Office 365, it’s important to consider running an early adoption program with a key group of business users, as well as members of the IT team who will support users. Running this program allows you to gather feedback on the user experience and get early success stories that can be used when launching Office 365 across your organization.

An early adoption program will also develop a group of early adopters to become your Office 365 Champions and support the broader launch. The program gives you an opportunity to test the service waters with a trusted group who will be more flexible if anything goes wrong.

Run your early adoption program during Week 2 of your Pre-Launch plan.

Tips and Tricks

Overall, when selecting your early adoption program participants, choose 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.

Use the early adoption program to solve real problems, don’t just kick tires on the technology. Encourage your program participants to use Office 365 for the Business Scenarios you have prioritized. Look for any changes you need to make to the scenarios to realize the business outcomes you’ve defined as important for your organization’s adoption of Office 365.
Who to include in your pilot group

- Users from across different lines of the business and departments, preferably those that work together on a project or business process.
- Likely Champions or leaders who will become advocates during the broad launch to the entire organization. Look back at Phase One to review what qualities to look for in a Champion.
- 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 launch.
- Leave out the CEO and Upper Management. While it can be tempting to ask for the CEO’s involvement, keeping them out of the early adoption program gives you an opportunity to smooth out any issues before they are exposed during the roll-out.
Actions for a successful early adoption program:

- Train early adoption program participants around the selected Business Scenarios, including the basic scenarios. Check out the available scenarios communication assets and training resources available on FastTrack here:

- Begin your Office 365 Champions program. Let your targeted Champions know about the program and begin recruiting and readying them to be Champions

- Get real-time feedback from early adoption program participants and adjust your adoption plan based on this feedback. Try creating a Yammer 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

- Be available to receive feedback by staying on Skype for Business during business office hours to answer any questions and share tips

- 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
In the five weeks leading up to your Launch, take the time to rally your organization around the Office 365 roll-out by developing a communication plan, organizing your training preparation, and running an early adoption program. Check out the timeline below which will guide you through your Pre-Launch weeks.

### Pre-Launch Timeline

<table>
<thead>
<tr>
<th>Timeline</th>
<th>Workstream</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Week 1</td>
<td>Communications</td>
<td>Develop communications plan and event strategy. Prepare materials.</td>
</tr>
<tr>
<td></td>
<td>Training</td>
<td>Plan your end-user training program.</td>
</tr>
<tr>
<td>Week 2</td>
<td>Communications</td>
<td>Send a 'countdown email' to let your audience know what's coming, set expectations, and spark interest by focusing on the “What's in it for me?”</td>
</tr>
<tr>
<td></td>
<td>Early adoption program</td>
<td>Begin your early adoption program by recruiting and training program participants, and establishing an early adopter program Yammer group. To gather data about their knowledge of Office 365, circulate a baseline survey shortly before users participating in your pilot receive activated accounts and devices.</td>
</tr>
<tr>
<td></td>
<td>Support</td>
<td>Ready your help desk to support end-users, and make sure they know about the Office 365 Help Desk Troubleshooting Guide.</td>
</tr>
<tr>
<td>Week 3</td>
<td>Communications</td>
<td>Ensure that Office 365 has a visual presence throughout your corporate offices with posters, flyers, and teaser videos.</td>
</tr>
<tr>
<td></td>
<td>Training</td>
<td>Set up an internal team site to store training resources such as getting started guides and tips &amp; tricks. You can also direct users to Microsoft's public learning center. See Office 365 Learning Center on <a href="http://aka.ms/O365learning">http://aka.ms/O365learning</a></td>
</tr>
<tr>
<td></td>
<td>Early adopters program</td>
<td>Check in with your early adoption program participants for feedback. Release a survey halfway through your pilot to gather data about their experiences with Office 365, and use the results to make any adjustments prior to a general rollout.</td>
</tr>
<tr>
<td>Week 4-5</td>
<td>Communications</td>
<td>Work with internal communications to make announcements across your company portal, IT portal, and other internal sites as needed. Just like with your pilot group, distribute surveys to your entire organization shortly before they receive their accounts and devices. Prepare for launch engagement event.</td>
</tr>
<tr>
<td></td>
<td>Early adopters program</td>
<td>Use a final survey immediately after the pilot period to determine whether you need to make further adjustments to your general training and awareness materials.</td>
</tr>
</tbody>
</table>

### Resources & Templates

To help you get the best possible uptake from your Office 365 roll-out we've provided a series of templates and resources.

Implementing your Office 365 launch across your entire organization is a big moment. It’s now time to use all your previous planning and effort and see your hard work pay off.

Launch Timeline

<table>
<thead>
<tr>
<th>Timeline</th>
<th>Workstream</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Week 6</td>
<td>Communications</td>
<td>Execute your Office 365 launch event to excite end users. Send out an &quot;Announcement email&quot; to let users know what's available, how to get started, and where to go to find help and resources.</td>
</tr>
<tr>
<td></td>
<td>Training</td>
<td>Conduct end-user training</td>
</tr>
</tbody>
</table>
Post-Launch

Now that you have successfully launched Office 365 into your organization, it is important to continue to engage with users on their Office 365 experience. Make sure to check in by providing additional Tips and Tricks and offering on-going training as needed.

Post-Launch Timeline

<table>
<thead>
<tr>
<th>Timeline</th>
<th>Workstream</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Week 8-12</td>
<td>Communications</td>
<td>Periodically share tips with end users by using the &quot;Tips and Tricks&quot; email templates to sustain momentum and broaden the use of Office 365. After your organization-wide rollout, circulate a final survey to assess end-user knowledge and experience with Office 365.</td>
</tr>
<tr>
<td>Training</td>
<td></td>
<td>Continue ongoing end-user training series as applicable</td>
</tr>
</tbody>
</table>
Rollout Resources to Execute Your Plan

To help Office 365 users get started, we’ve created five basic scenarios that align broadly with the types of tasks that employees need to do every day. This includes tasks from communication via email and calendars, to storing and sharing files, to holding virtual meetings and collaborating in real time.

See the different scenarios below:

**Get it done anywhere**
Get the familiar Office experience on all your devices using a browser or mobile apps designed to work with Office 365.

**Emails and calendar on the go**
Get your meetings, contact info, to-do list, and email on any device so you can clean up your inbox and manage urgent matters even when you’re not at your desk.

**Collaborate on content**
Store your work files in OneDrive for Business so you can update and share them from anywhere, sync files and work offline, work on documents with others at the same time, and manage files with enterprise grade security and compliance.

**Make meetings matter**
Use the Office 365 apps to connect with others and run effective meetings, while saving time and resources. Use Skype for Business, Outlook, PowerPoint, OneNote, and SharePoint Online sites to collaborate better.

**Bring your team together**
Get connected to the right people, share information across teams, and organize around groups with Yammer Enterprise. A Yammer Enterprise network helps build a body of knowledge that’s instantly accessible by any coworker at any time and from any device.
Each basic scenario on the FastTrack website includes templates for email, posters, and flyers, as well as videos and training resources. You can customize the templates for your communications plan.

http://fasttrack.microsoft.com/office/resources/drive-value
Take the time during week 1 of your Pre-Launch to review these materials and determine which ones can best be utilized for your organization’s launch. This will become your communications plan.

Use the basic scenarios as a starting point for creating your communication and training strategy.

- Translate the basic scenarios into things that solve real business problems
- Decide which scenarios make sense for your company to promote in your Office 365 launch
- Use the resources associated with each scenario to implement your email announcements and training activities
Email Templates

Each scenario includes customizable email templates for the typical communication tasks in each phase of your Office 365 Launch and adoption. The emails include direct links to training and resources to help users learn about Office 365 capabilities. These links are curated for each scenario. The email templates available include:

<table>
<thead>
<tr>
<th>Email Type</th>
<th>Phase</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>“Countdown”</td>
<td>Pre-launch</td>
<td>Use this message to generate excitement and inform employees about the things they’ll be able to do with Office 365. One email per scenario.</td>
</tr>
<tr>
<td>“Announcement”</td>
<td>Launch</td>
<td>Use this message to kick off the launch and instruct new users to get started with Office 365. One email per scenario.</td>
</tr>
<tr>
<td>“Tips and Tricks”</td>
<td>Post-Launch</td>
<td>Use these “Tips and Tricks” to introduce more Office 365 capabilities and help users be more productive. Three emails per scenario.</td>
</tr>
</tbody>
</table>

The emails are available as Word (.docx) documents. You can select which templates you want to use, and then customize them freely to suit your communication objectives by adjusting the copy to fit your company style, adding your company logo, and filling in content. Be sure to send emails from a pre-determined sender account (e.g. an executive sponsor’s) to a specific target audience.

Tips and Tricks

Get the word out in other ways than just email!

You can generate anticipation about your Office 365 launch in your physical office space by using the teaser videos and print-ready posters as part of your awareness campaign.

http://fasttrack.microsoft.com/office/resources/drive-value
Conduct an early adoption program and update your Success Plan based on collected feedback

Customize available templates and resources as appropriate to support your Launch

Execute Pre-Launch, Launch and Post-Launch adoption activity as you rollout Office 365
Phase 03: Drive Value

The initial launch of Office 365 into your business will lead to people seeing immediate value. However, this is just the start. Office 365 will continue to have new added features and people will want to do more with the service as their understanding of it improves.

Setting yourself up to help your people take advantage of this will lead to long-term success.

In this phase, you will learn about post-launch engagement activities and begin to measure, share successes, and then iterate to further drive adoption.
Boost Engagement and Drive Adoption

It is important to plan and execute ongoing engagement activity to drive adoption. This will work to keep people inspired across the organization after the initial ‘buzz’ of the services has worn off. It will also ensure that you are getting the most out of Office 365 in your organization.

It is important to make sure that you’ve got both quantitative and qualitative data on what’s happening with your organization’s adoption of Office 365. Utilize the workload usage reports in the admin console for the quantitative data and end user surveys and Yammer groups for the qualitative.

Make sure that you share successes and send out Office 365 tips regularly. You should also aim to make heroes of the people who are getting value from Office 365 to inspire others to do the same.

Use the data that you have gathered to target future communications that promote the under utilized services, stressing the “What’s in it for me?” message to your users.
Monitor your Organization's Adoption of Office 365

Within the Office 365 Admin Portal you'll find reports available to indicate your current user engagement levels for the different workloads, use these reports to identify areas for improving adoption.

Tips and Tricks
Measure and record the usage metrics before you start, that way you can see the effectiveness of the adoption activities.
Drive Adoption

You can help increase Office 365 adoption over time with ongoing awareness and training activity.

### Awareness Campaigns

- Leverage tips and tricks emails to reinforce skills development:
- Share success stories as to how your people are using Office 365 in innovative and impactful ways
- Periodically host additional engagement events like town hall meetings or lunch & learns to drive end user engagement
- Set challenges for people and run competitions to celebrate the best ways they’ve used Office 365 to do work differently

### Training

Training is very important as staff understanding of Office 365 will evolve at different rates for each individual or team.

- Regular training calendar for refresher sessions
- Departmental sessions to share where people are getting value
- Drop-in clinics for people who have challenges
- Ensure your helpdesk can answer ‘how do I’ type questions.
Measure, Share Success and Iterate

Use the Measuring Success Guide to assess how effective your launch of Office 365 has been. This allows you to benchmark against set criteria to improve solutions for your users and allows you to capture successes.

https://go.microsoft.com/fwlink/?linkid=843796

End-User Survey Templates

Use the survey template to measure satisfaction and progress against your benchmark.

Office 365 User Satisfaction Surveys

This document contains sample end-user surveys you can customize for your PILOT and ENTERPRISE Roll-Out phases. Gathering feedback from your Office 365 users can help track progress and measure success in the areas of user adoption and productivity. In addition, the pilot surveys can help assess whether your organization is ready to move onto the enterprise critical phase of your deployment.

These sample surveys give you a good foundation to help you follow your pilot experience. Each is designed for a different point in the lifecycle.

- **Baseline** – Circulate this survey before your pilot and clients receive activated accounts and assess their baseline data about their knowledge and experience with Microsoft Office 365.
- **Mid-point** – Circulate this survey halfway through your pilot and your project partners to gather data about current knowledge and experience of Microsoft Office 365.
- **End-point** – Circulate this survey halfway through your pilot and your project partners to gather data about your success criteria. Use this survey to gather feedback about satisfaction and productivity at the end of the pilot. This data can be used to analyze your success and help you determine whether your organization is ready to move on to the enterprise critical phase.

**Note:** It is important to define your own acceptable levels for your baseline satisfaction metrics. Microsoft does not recommend setting a "good" target for any number of reasons. It is possible that the project team may not be able to achieve the results they want to see. Review the questions in the survey and determine if they match the criteria for your environment and pilot. If not, adjust as necessary.

For optimal results, customize the questions to meet your organizational goals, then create surveys in PowerPoint or a survey tool, fax streamlined reporting and analysis.

https://go.microsoft.com/fwlink/?linkid=843797

Tips and Tricks

In the Envision Phase of this adoption guide, we set a task to define your success criteria. Be sure to refer to this as you work your way through the measuring success guide.
Capture and Share Success

Success stories are often just as valuable as quantitative measures when demonstrating Office 365 success. Throughout your rollout, have your project team members and champions identify examples that demonstrate cross-functional collaboration and teamwork and share them by using Yammer.

When sharing a story about your experience with Office 365, be sure to include these details:

- **Time.** The story should begin with a time marker, so the audience knows when it happened.
- **Characters.** The story should feature names, so the audience knows who was involved.
- **Events.** The story should recount the events that took place.
- **Visuals.** The audience should be able to picture what has happened.

Stories about business value can easily be shared internally through an Office 365 Success Stories group in your Yammer network. You can also share success stories externally with the wider Office 365 community via the Driving Adoption community.

http://aka.ms/driveadoption

**Tips and Tricks**

Have fun! Creating a contest and generating positivity around Office 365 should be interesting and engaging. Try to create a following.
Iterate

Driving adoption is a continuous cycle and doesn’t end after launch day or measuring your launch impact. Continue to look for new ways where Office 365 can add business value to keep up with the evolving needs of your users and organization.

- Use the insights from your evaluation process to kick off additional trainings to educate users about best practices and high-impact Office 365 solutions

- Schedule additional business scenario and solutions development sessions with more departments in your organization. Afterwards, hold departmental trainings where you explain how Office 365 can drive success for each business line.

You can use the Productivity Library to help you identify new Business Scenarios to further utilize Office 365.

http://fasttrack.microsoft.com/office/envision/productivitylibrary

- Make sure to encourage your users and Champions to develop ideas for how Office 365 can improve business practices and to share them with others via engagement events, community activities, and a Yammer group. Use these ideas to generate additional solutions and kick off additional trainings.

We want them to love this tool, and part of that is not only listening to employees, but taking that feedback and truly turning it around and implementing that feedback.

– Jeff Schuman, Nationwide
Manage and Prepare for Change

Managing Change in Office 365

https://aka.ms/managingchangeO365

Your business and the cloud are in constant motion. People are always looking for new opportunities to work more effectively and the cloud’s continually updated features enables this to happen.

It’s best to keep an eye on Office 365 Public Roadmap and the Office blogs to be aware of potential new service features and updates that you can take advantage of.
Office 365 Public Roadmap

Filter features by app, services, or platform to identify which features and updates you can best take advantage of.

Features are grouped by development phases.

http://fasttrack.microsoft.com/roadmap
Office Blogs

Blog articles are easily shareable across multiple mediums.

http://blogs.office.com
Manage how your organization receives updates

Using the Office 365 admin center, you can sign up for an early release so that your organization receives updates instantly. If you rather, you can also designate that only certain individuals receive the updates, or choose to remain on the default release schedule and receive the updates later. Learn more about your options here: [http://aka.ms/releaseoptions](http://aka.ms/releaseoptions)

Have your Office 365 admins use the Message Center (within the admin portal) to keep Office 365 running smoothly in your organization.
Phase 03 Checklist

- Conduct ongoing activity to drive Office 365 adoption
- Monitor and report on Office 365 success metrics
- Share Office 365 success stories throughout your organization
- Look for and implement new ways for Office 365 to add value to your users and organization
- Manage and prepare for change
Visit
fasttrack.office.com
http://fasttrack.microsoft.com

Follow the latest news
about Office 365
http://blogs.office.com

Join the
Tech Community
http://aka.ms/driveadoption

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