

ADOPTION GUIDE

 Office 365



[success.office.com](https://success.office.com)



# Office 365

## Preface

The way people connect in their personal and professional lives has changed fundamentally in the last few years – the world has effectively formed a giant network. People now expect to be able to get things done at work in the same way.

Office 365 is an invitation for your organization to work in that way. It allows you 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.

The Office 365 Customer Success team have contributed our experiences of working with customers on their journeys to working differently to this guide. We hope it inspires you with what is possible and that you like it, use it and share it with the people in your organization. We'd welcome feedback on it, through the Office 365 Network.

Change the way you work, because the way you work impacts the work you do.

**Mike Grafham,**  
Office 365 Customer Success  
Microsoft



Join the conversation on the Office 365 network  
➔ [aka.ms/Office365Network/DrivingAdoption](https://aka.ms/Office365Network/DrivingAdoption)

Achieving a successful Office 365 rollout means focussing on driving adoption and ensuring everyone understands the benefits of working in a new way.

Before rolling out Office 365, take a step back and think about why you acquired 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 is about understanding the business challenges that you will address with solutions based out of Office 365. It is about ensuring that people across your organization understand the benefits and embrace the solutions you provide.

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

- 1 Define a Vision and Identify Business Scenarios
- 2 Prioritize Solutions and Create an Adoption Plan
- 3 Commit Resources and Execute an Adoption Plan
- 4 Measure, Share Success & Iterate

This Adoption Guide will help you take a best-practice approach in your planning and rollout of Office 365 enabling you to achieve a sustainable adoption program.



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## STEP 1:

# DEFINE A VISION & IDENTIFY BUSINESS SCENARIOS

A well-defined business vision and a list of targeted business objectives will serve as your guiding light throughout your launch and rollout planning, and it will also help secure buy-in across your organization.

In this step you will learn how to craft a vision statement, see examples of common goals and challenges faced by organizations, create your own list of business scenarios, and secure executive support for your launch planning.



## Why identify key stakeholders?

A successful adoption strategy starts with a team of committed individuals representing a cross-section of your organization. Use the table below to understand the different stakeholders, their role and responsibilities in a successful Office 365 rollout.

ROLE	RESPONSIBILITIES	DEPARTMENT
Project manager	Oversee the entire Office 365 launch execution and rollout process	Project Management
Executive sponsor	Communicate high-level vision and values of Office 365 to the company	Executive Leadership
Training lead	Manage and communicate training content about Office 365	IT and/or Human Resources
Champions	Help evangelize Office 365 and manage objection handling	Any Department (Staff)
Department leads	Identify how specific departments will use Office 365 and encourage engagement	Any Department (Management)
IT specialist	Oversee all technical aspects of the rollout, including integrations	IT
HR manager	Integrate Office 365 into HR processes and manage HR content on Office 365	Human Resources (Management)
Communication lead	Oversee company-wide communications about Office 365	IT and/or Corporate Comms
Community manager	Manage day-to-day Yammer network activity; provide guidance and best practices	IT and/or Corporate Comms
SharePoint site manager	Help manage SharePoint site strategy for the organization, serve as the link between business side and IT	IT and/or Staff



### 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.



### TIPS & TRICKS

It is important to secure executive sponsors when you identify the important stakeholders within your organisation. If you have the leadership team and key stakeholders on board, there will be significant business drive to sustain momentum and achieve end-user adoption.

## Why are executive sponsors important?

Ensuring that executives are involved in the Office 365 Adoption Plan is critical. They have the greatest influence on company culture and can actively communicate the value and benefit 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 should:

- Help the project team craft the overarching vision of Office 365 by tying it to broader organizational objectives.
- Play a role in communicating the vision 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.
- Join lunch & learn sessions to reiterate the company's vision for change through Office 365.
- Help draft Office 365 awareness messaging.



### TIPS & TRICKS

Identify opportunities to lead by example. Train your executive sponsors and assistants on some Office 365 capabilities to help them showcase how to work in a new and more effective way within your organization.

- Use Yammer for company updates or town hall meetings.
- Utilize Skype for Business to reduce the number of in-person leadership meetings – meaning that you can have quicker, more frequent and efficient meetings.

*Leadership adoption is imperative to success, especially around organizations that still haven't experienced that culture change.*

User Adoption Focus Groups, Microsoft, Apr. 2013

## Why set a vision?

A well-defined vision enables employees of all levels to foresee the value that the new tools will bring; not only to the organization as a whole but also how their individual roles fit within this vision. It should inspire, and sharing this motivation along with how you plan to get there will be crucial for your success.

## How do I craft a vision statement?

When defining your vision, start by involving key stakeholders and business sponsors. This will help you to ensure that your approach is aligned with the top priorities of the business, get executive support, and reinforce the idea that Office 365 is a critical solution for the business.

Organize a vision workshop and ask the following questions:

- 1 How are employees already using existing software productivity tools to get their work done?
- 2 What are the current collaboration and communications challenges within the organization?
- 3 Why is the organization changing the way we work at this time?
- 4 How does working in a new way support the organization's overarching vision & strategy?
- 5 How will working in a new way change the organization?
- 6 What does success look like following the adoption of this new way of working?
- 7 How will a more social and open way of working benefit the overall organization?
- 8 How will a more social, collaborative, open way of working benefit every employee personally?



### TIPS & TRICKS

1. Keep your focus on the high-level direction of your business and ensure it has tangible impact for employees.
2. Generate user buy-in and impact beyond your IT Department by going beyond specific IT benefits and demonstrate what's in it for the business and the employees.

## Sample vision statements

When crafting your vision, it's important to think about how it can be positioned to include the whole organization. This positioning is critical in order to have a lasting impact.

EXAMPLE <b>Transparent Communication</b>	"A platform to deliver a consistent message and facilitate two-way communication."
EXAMPLE <b>Inspired Work</b>	"Accelerate innovation giving us the agility to meet the needs of our changing business"
EXAMPLE <b>Shared Knowledge</b>	"Increase access to information and the ability to share best practices and learn from each other peer-to-peer."

## Draft your vision statement

Draft your vision statement below in 1-4 sentences. These statements will help your end users understand the benefits of the new technology, which is key to getting their buy-in and support.

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Remember that your vision may change over time, as your organization and needs change and as you progress.

# Identify and define business scenarios

Identifying and defining your business scenarios is an important step in ensuring a smooth adoption of Office 365. Business scenarios are set at a level below your vision. They are targeted goals that you want to achieve as a business or individual and are tied to existing organizational initiatives. It is important to define clear business scenarios against which you can effectively measure success and realize tangible results.

**How does it all fit together?**

A vision includes the areas where an organization needs to evolve in order to successfully execute against the current business strategy.

*Example: Drive productivity by facilitating cross-geographic and functional team project collaboration*

Business scenarios have a tighter scope than the corresponding vision, and illustrate the desired goals that a company or department is going to achieve in a short period of time. These can have an impact on a certain team or across the organization.

*Example: Conducting effective meetings*

Solutions will help light up Office 365 capabilities to enable each scenario and ultimately reach your business strategy and goals.

*Example: Engaging meeting participants by using a Yammer group for regular status updates instead of holding weekly meetings*

```
graph TD; Vision((Vision)) --- BS1((Business scenario)); Vision --- BS2((Business scenario)); BS1 --- S1((Solution)); BS1 --- S2((Solution)); BS2 --- S3((Solution)); BS2 --- S4((Solution));
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## Hop on with the Onboarding Center

Need help deploying Office 365? FastTrack and its Onboarding Center is a new program that delivers a quick and predictable path for Office 365 deployment.

If you are a new Office 365 customer with more than 150 users, you will be put in touch with a Microsoft expert to assist you with the onboarding process. The expert will work with you to understand your business challenges, guide you through the current environment, overcome any issues and also help with connecting your current infrastructure to get you up and running quickly.

**Get a free trial**

Have your users experience the value of Office 365 for free. Begin your Office 365 experience with helpful scenarios and how-to documentation for your users and IT professionals - all from within your own Office 365 environment.

➔ [deploy.office.com/getting-started](https://deploy.office.com/getting-started)

# Identify business scenarios

In order to secure buy-in, 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 champions who can help drive a positive transition.

The following questions are a great starting point to determine and identify business scenarios in a workshop:

- 1 What are some of the organization's challenges relating to communication and collaboration?
- 2 What are the areas in which your organization would like to improve?
- 3 What methods of communication and collaboration are typically better received by your organization than others?
- 4 What is the process for drafting, distributing, and sharing information?
- 5 What are some of the factors that would help drive the business scenario forward?

Check out the 'Getting to know Office 365' booklet  
Referencing this booklet combined with your workshops will help identify your business scenarios.  
[aka.ms/o365booklet](https://aka.ms/o365booklet)

# Define your own business scenarios

<b>BUSINESS SCENARIO:</b>	<i>Example:</i> Conducting effective meetings	
<b>CHALLENGE:</b>	<i>Example:</i> Meeting participants aren't always completely focused on the meeting and may resort to multitasking during meetings.	
<b>DEPARTMENT:</b>	<i>Example:</i> This particular challenge has been communicated from all departments within the organization.	

Jumpstart your project  
Visit the Office 365 Customer Success Center and leverage the Getting Started scenarios.  
[success.office.com](https://success.office.com)



Once you've established your vision and have assessed your business challenges and opportunities, the next step is all about mapping the Office 365 capabilities to your targeted business scenarios and prioritizing the workloads that will help you get there.

## STEP 2:

# PRIORITIZE SOLUTIONS AND CREATE AN ADOPTION PLAN



# Define and prioritize your solutions

Office 365 can help people in many ways: from out of the box capabilities to custom solutions, the possibilities are virtually limitless. In order to be successful, you need to get things right at the beginning. You need to simplify, and start small, to avoid overwhelming people with change.

Start with the most fundamental scenarios and plan for a phased approach, where you will add more solutions unlocking the full value of Office 365 within your organization. Focus on the most appealing scenarios for business users, align with business objectives, and target the right teams.

Put yourself in your user's shoes, and form a representative user group from the business units to pilot solutions. Get a mixed group of business sponsors, champions, but also skeptics to have a good representation of user profiles, cultures and demographics - keeping people at the center of the experience.

*"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, Director, Digital Marketing, Social and Collaboration, Nationwide

**Watch the webcast**  
Nationwide - Building a World-Renowned Intranet with SharePoint 2013 and Yammer (SPC311)  
➔ [aka.ms/nationwidespot](https://aka.ms/nationwidespot)

**TIPS & TRICKS**  
Did you know that you can utilize Office 365 apps available in the Office Store to benefit from the the Office 365 platform extensibility without having to build your own custom solutions?  
<https://store.office.com/>



## Does your solution match these factors?

Everett M. Rogers

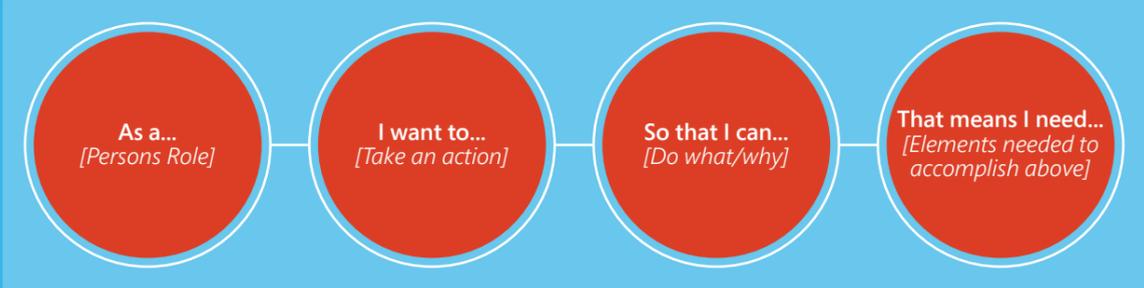
(March 6, 1931 – October 21, 2004)

Rogers defines several intrinsic characteristics of innovations that influence an individual's decision to adopt or reject an innovation.

Rogers was a communication scholar, sociologist, writer, and teacher. He is best known for originating the diffusion of innovations theory and for introducing the term early adopter.

# Getting to solutions

Not sure how to begin? Use these four statement starters to help determine the solutions needed to enable your business objectives:



## Task 1: Identifying associated features

Identifying the associated features of Office 365 enables you to define your solution. For each of your business scenarios, use the table below to identify the associated features in order to map the Office 365 capabilities to your targeted business goals.

### Identify your features

**Challenge: Example - Engaging meeting participants**

Product	Proposed Solution
Yammer	<i>Example - Use a Yammer group for regular status updates instead of weekly status update meetings.</i>
Skype for Business	<i>Example - Use online polls to ask and record participants answers. Utilize video calling with whiteboard capacity.</i>
SharePoint	<i>Example - Easily share documents live with other participants. Recommended for long-term and well structured projects.</i>
OneDrive for Business	<i>Example - Easily share documents live with other participants. Recommended for ad-hoc meetings.</i>
Office & Outlook	<i>No features directly applicable to this scenario.</i>

### Define your solutions

<b>BUSINESS SCENARIO:</b>	<i>Example:</i> Conducting effective meetings	
<b>CHALLENGE:</b>	<i>Example:</i> Meeting participants aren't always completely focused on the meeting and may resort to multitasking during meetings.	
<b>DEPARTMENT:</b>	<i>Example:</i> This particular challenge has been communicated from all departments within the organization.	
<b>SOLUTION:</b>	<i>Example:</i> Create polls in Skype for Business to gauge the sentiment of meeting participants, or to vote on decisions and use Whiteboard to foster real time collaboration.  Use a Yammer group for regular status updates instead of weekly status update meetings.	

## Task 2: Prioritize your solutions

If you have a handful of potential solutions, this step will help you to prioritize them and highlight the ones that will bring the most value to the business. Remember, it's important to start small and demonstrate quick value, so that you don't overwhelm your teams.

We encourage you to take the following four parameters into consideration as you work to prioritize the solutions and define your step-by-step approach.

- **Complexity**  
How complex or difficult is it to put the solution into place? It could be due to technical, organizational or cultural challenges.
- **Added Value**  
How much value will this solution deliver to employees?
- **Impact**  
Will the solution impact employees across the whole company or is it specific to a team or department?
- **Leadership Support**  
For each solution, estimate the amount of leadership support you are likely to receive.

## Prioritize your solutions

Once you have all of your ratings you can apply your scores to a priority table to analyze how they compare to each other

Solution	Complexity	Added Value	Impact	Leadership Support	Total
<i>Example: Create polls in Skype for Business to gauge the sentiment of meeting participants, or to vote on decisions and use Whiteboard to foster co-authoring.</i>	5 4 <b>3</b> 2 1 Low - High	1 2 <b>3</b> 4 5 Low - High	1 2 3 4 <b>5</b> Low - High	1 2 <b>3</b> 4 None - Strong	14
	Circle one	Circle one	Circle one	Circle one	
	5 4 3 2 1 Low - High	1 2 3 4 5 Low - High	1 2 3 4 5 Low - High	1 2 3 4 None - Strong	



Right now, it's a great idea to take a look at the Office 365 Roadmap [roadmap.office.com](https://roadmap.office.com) to be aware of any updates or features that are planned for the service.



Check in with your IT team to ensure they are utilizing both the Onboarding Center and Deployment Plan. Work with them to make sure the solutions you have identified are part of your organization's Deployment Plan.

## Task 3: Define your success criteria

When you develop your ideal business scenarios and solutions, it's critical to come up with a formal set of success criteria to measure the impact resulting from your Office 365 rollout. 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 statements to help when determining your success criteria:

- Evaluate where you are before getting started. Establish your benchmark and user surveys.
- Identify business KPIs that may improve based on desired outcomes (satisfaction, time to process an order, etc.).
- Identify success stories and gather quotes using interviews, roundtables, Yammer Groups, etc.
- Measure progress against your KPIs to complement the qualitative analysis with data.

We recommend that you choose criteria that will help you showcase success to leadership teams, such as user satisfaction, employee engagement, adoption velocity, and figures related to your desired business scenarios.



## 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.



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—brown bag sessions, for example.
- 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 about building Champion Communities.
- Communicate to individuals about the champions role and where they can be found—remember they are not an IT support function but business representatives.



### TIPS & 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.

## Watch the webcast

Best Buy: The rise of the ninjas—a SharePoint 2013 user adoption story (SPC296)

➔ [aka.ms/bestbuyninjas](http://aka.ms/bestbuyninjas)

# Create your adoption plan

You are now ready to determine the activities to create a sustained adoption of Office 365. Raising awareness around these solutions is an essential step in driving adoption as it informs, involves and inspires your users.

Consider a mix of these activities to maximize impact and adoption:

- **Communications**  
Incorporating internal announcements or newsletters. This is critical to driving adoption as it informs and inspires users about the new technology and helps create a natural “buzz” or excitement.
- **Engagement Events**  
Things like parties, town hall meetings, contests, and giveaways can help further momentum and encourage employees to start interacting with the new tools.
- **Training**  
Can vary from classroom-style sessions to self-help getting started guides. It is essential to ensure that employees understand how to actually use the new technologies to get their work done.



## TIPS & TRICKS

Use the Office 365 Adoption Planning tool to create your own adoption plan in which you can collate a mix of these different activities all in one document.

<https://success.office.com/portal>

The screenshot displays the 'Office 365 Customer Success Center' interface. At the top, there's a navigation bar with 'Home', 'Business Benefits', 'Scenarios', 'Adoption', 'Deployment', 'Community', 'Partners', 'Resources', and 'My Portal'. Below this is the 'Adoption Plan Steps' section, which includes a progress bar and several sub-sections: 'Stakeholders', 'Vision', 'Scenarios', 'Success Metrics', and 'Activities'. The 'Scenarios' section is currently active, showing a list of scenarios to be selected, a table of chosen scenarios, and a table for prioritizing scenarios based on Added Value, Complexity, Impact, and Leadership Involvement. The 'Snapshots' section shows two snapshots created by David Longmuir.

Share and review your Office 365 adoption plan with others within your organization

Complete your adoption plan by following our step-by-step approach and easily access the resources that you need for each step

Kick-start your project using our set of fundamental Office 365 scenarios and benefit from the corresponding communication and training templates for your end users

Take advantage of the most common adoption activities driven by successful customers during their Office 365 roll-outs

Capture your adoption plan in a personalized report with the click of a button



In this step, you'll utilize your work completed in Step 2 and start to put your planning into action by both committing resources and executing on your adoption plan. You'll discover key resources available to you and best practice on how to use them and at which stage.

**STEP 3:**  
**COMMIT RESOURCES &  
EXECUTE AN ADOPTION PLAN**



## Awareness & communications resources

To help inform users of upcoming rollout, share 'what's in it for them' and create anticipation.

### POSTERS, BOOKLETS & PRINT

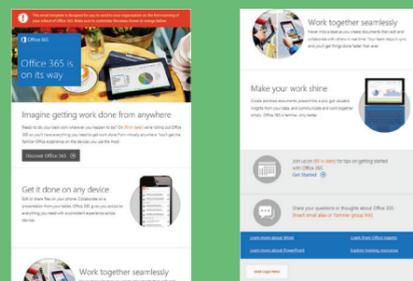
Ensure that Office 365 has a visual presence throughout your corporate offices by using print messaging.



→ [success.office.com/resources](https://success.office.com/resources)

### COUNTDOWN & ANNOUNCEMENT EMAILS

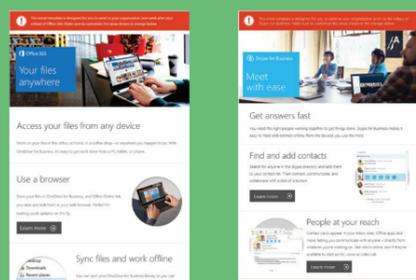
Let people know what's coming, set expectations and spark interest by focussing on the 'What's in it for me?'.



→ [success.office.com/resources](https://success.office.com/resources)

### TIPS & TRICKS EMAIL SERIES

Customizable email templates to help maximize depth and breadth of usage over time.



→ [success.office.com/resources](https://success.office.com/resources)

## Engagement events & community activities

To help create a sense of anticipation, bring people together, and increase confidence.

### HIGHLIGHTS AND TEASERS

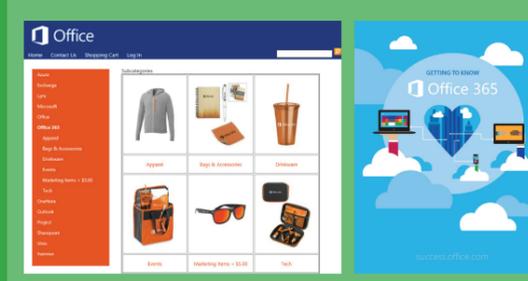
A great way to generate buzz and get people excited is to play teaser videos during an event or by the cafeteria.



→ [success.office.com/resources](https://success.office.com/resources)

### SWAG & BROCHURES

Use swag and brochures to really maximize the effect of events such as 'Lunch-and-Learn' sessions.



→ [success.office.com/resources](https://success.office.com/resources)

### QUICK START GUIDES

These printable guides contain useful tips, shortcuts, and screenshots to help people find their way around Office 365.



→ [aka.ms/officestart](https://aka.ms/officestart)

## Email messaging & newsletters (Start 4-8 weeks before launch)

- Keep emails short and sweet, with a clear call to action and links to more information like FAQs. Emails should be sent from an individual, preferably an executive sponsor, not a group or distribution list.
- Email and newsletter content should answer the main questions your end-users have: "Why are we moving to Office 365?" "What is required of me?" "How does this help me do my job?" Use your Set Business Vision and Identify Business Scenarios exercises to help guide the messaging.
- Make your emails attractive, with style and colors that are consistent with your campaign.
- Enable two-way communication with your users by including links to your internal site and Yammer group for feedback, support, and training.

## First touch events & lunch and learns (Start 4 weeks before launch)

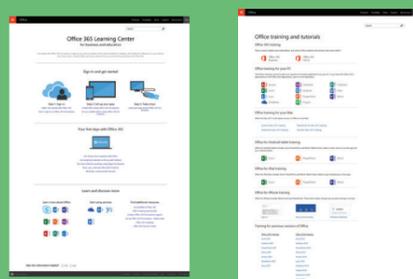
- Host an in-person event where users can browse Office 365 and access training resources. Have the event in a high-traffic area such as a lobby or lunch room. Have champions actively engage with the audience to answer questions, address concerns, and encourage the use of Office 365.
- Conduct lunch & learn sessions on a regular cadence (e.g. quarterly) and encourage participation by offering incentives. Informal lunch & learn sessions can offer end users the ability to ask questions in an open forum.
- Organize contests, scavenger hunts, prizes, and giveaways that require people to interact with Office 365.
- Display printed materials to raise awareness about the day's activities and showcase exciting Office 365 features.
- Point users to the Yammer Group to continue the conversation and help consolidate information.

# Training & support

Help users transition and get started with the new apps.

## OFFICE 365 LEARNING CENTER

Get people up and running quickly with these essential learning and training resources for Office 365.



[aka.ms/o365learning](https://aka.ms/o365learning)

## OFFICE TRAINING & TUTORIALS

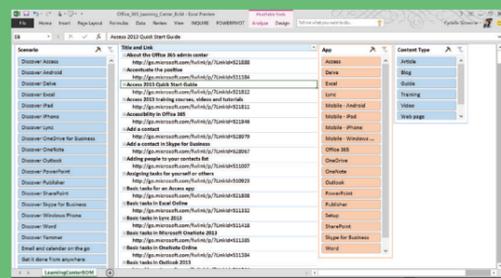
Use these resources to help make the switch to the new Office and quickly learn how to do everyday tasks.



[aka.ms/officetraining](https://aka.ms/officetraining)

## OFFICE 365 LEARNING CENTER BoM

Use this to help pinpoint exactly what you need among all of the available training content.



[success.office.com/resources](https://success.office.com/resources)

## HELP DESK RESOURCES

Use this guide to help get your help desk ready to troubleshoot Office 365 users.



[success.office.com/resources](https://success.office.com/resources)

# Visit the Office 365 Customer Success Center

Find these resources and create your adoption plan with detailed timelines and specific tasks.

[success.office.com](https://success.office.com)

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.

A key part of your training plan is to demonstrate the benefits of the change. Understanding and addressing user concerns is key toward easing the transition and ensuring a successful deployment. Here are some tips:

- CREATE A LEARNING CENTER:**  
Use an internal team site to store training resources such as getting started guides and tips & tricks.
- LEAD WITH BENEFITS:**  
Explain what their specific work will look like with Office 365, and what benefits they can expect in comparison to any former tools or processes.
- USE REAL WORK SCENARIOS:**  
Use the tasks or business processes that are familiar to your audience as a way to draw them into feature-specific information.
- INCLUDE GOVERNANCE:**  
Make sure to integrate information about the rules, processes, and best practices that your organization has put into place around Office 365.
- MOBILIZE CHAMPIONS:**  
Call upon your network of champions who are committed to developing Office 365 expertise to provide coaching and assistance across their teams.



**STEP 4:**  
**MEASURE, SHARE SUCCESS  
& ITERATE**



In this final step, you'll learn how to utilize the feedback gathered throughout the adoption journey, measure progress, identify and share success and then iterate.



## Measure progress against a benchmark

It is important to measure progress against your benchmark during the roll-out process, keep improving solutions based on user feedback and capture successes to share.

It'll inspire other people to use Office 365 and allow them to benchmark its' success. One way of gathering qualitative and quantitative data is to distribute surveys about your users' knowledge and sentiment towards Office 365.

Here are some suggestions for surveying end users during your rollout:

### Soft launch or pilot

- Circulate a baseline survey shortly before users participating in your pilot receive activated accounts and devices, to gather data about their knowledge of Office 365.
- 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.
- 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.

### Full rollout

- Circulate a baseline survey shortly before users receive activated accounts and devices, to gather data about their knowledge of Office 365.
- Release a survey halfway through your launch to gather data about users' experiences with Office 365 and use the results to make any necessary adjustments.
- After your organization-wide rollout, use a final survey to assess user satisfaction with the rollout process. You can release this survey 90 days after launch, and then in quarterly increments to help measure user adoption from a satisfaction and productivity standpoint.



### TIPS & TRICKS

Early in the adoption guide we set an set a task to define your success criteria, be sure to refer to this as you utilize the templates found on [success.office.com/resources](http://success.office.com/resources)

As you develop your success criteria and surveys, take advantage of the examples we provide.

#### END-USER SURVEY TEMPLATES

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

[success.office.com/resources](http://success.office.com/resources)

#### SUCCESS CRITERIA EXAMPLES

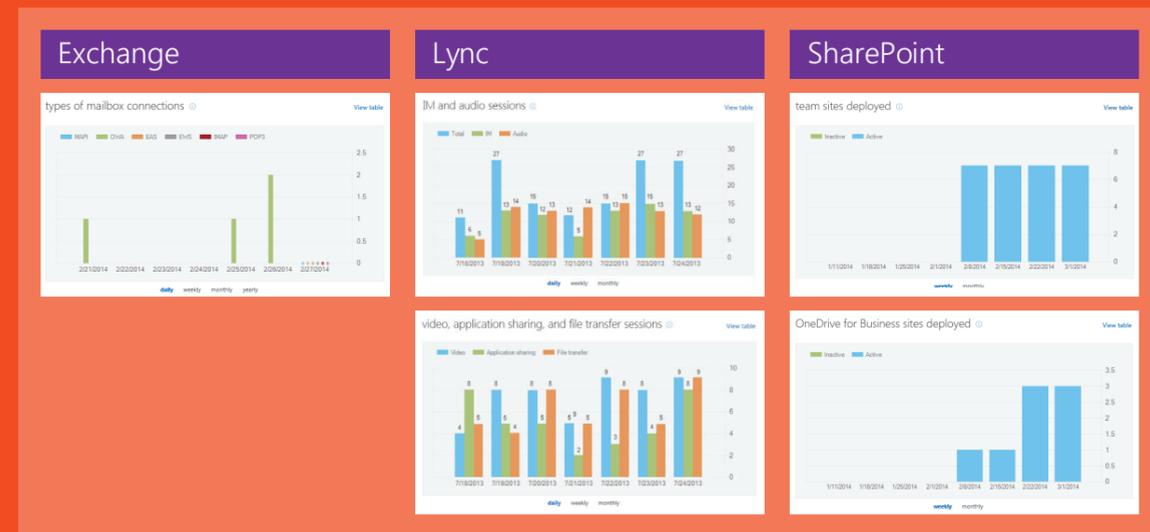
Use success criteria examples and dashboard to track progress on rollout and adoption.

Success Criteria	Method/Source	Metrics	Example Goal	Trend	Status
<b>Increased adoption:</b> Increased usage correlates to user adoption of the technology.	Quantitative: • Office 365 reports	• Monthly usage • Quarterly usage • User profile completion • Minutes of Lync audio used	Completion of pre- and post-rollout surveys will show increasing adoption of Office 365.	▲	90%
<b>Training effectiveness:</b> Increased usage correlates to training effectiveness.	Quantitative: • Office 365 reports Qualitative: • End user surveys • Partner Group & Feedback	• Monthly usage • Quarterly usage • Minutes of Lync audio used • Employee User Satisfaction score	Completion of pre- and post-training usage reports will show increasing adoption per month.	▲	90%
<b>Reduced operating costs:</b> Increased adoption correlates to reduced third-party conferencing usage, travel time, and resource allocation.	Quantitative: • Office 365 reporting • Help Desk reports • Travel and expense reports • Dept. measures	• Monthly usage • Quarterly usage • Post-rollout usage of third party phone conferencing • Travel and expense reports • Help Desk calls	Completion of pre- and post- Office 365 reports will show cost savings.	▲	90%
<b>Increased productivity:</b> Increased adoption correlates to faster communication and decision-making, shorter time to complete tasks.	Qualitative: • End user surveys • Partner Group & Feedback	• Time required to complete projects	Time to complete customer orders should drop by 15% within 6 months.	▲	90%
<b>Improved collaboration:</b> Increased cross team and cross location communication.	Qualitative: • End user surveys • Partner Group & Feedback	• Employee satisfaction • Time saved	Teams that work from multiple locations will report improved feelings of connection with their teammates within 3 months of the rollout.	▲	90%
<b>Improved employee satisfaction:</b> Flexible working options improve employee satisfaction. Stronger employee engagement, reduced stress, improved work-life balance.	Qualitative: • End user surveys • Partner Group & Feedback	• Employee satisfaction	Employee satisfaction improves by 10% within 6 months.	▲	75%

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## Utilize the KPI dashboard to track adoption progress

These graphs represent some of the reports available within the Office 365 Admin Console that can tie to the metrics needed to represent consumption or adoption improvements.



## Capture & 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 demonstrating cross-functional collaboration and teamwork. They can do this simply by surveying end users about the personal value they have achieved and how Office 365 is helping them meet their goals.

The diagram illustrates the following steps:

- An employee on the night crew flags a non-routine problem** (CHARLESTON)
- Other stores across the country confirm the problem** (DALLAS)
- An executive acknowledges the issue** (CHICAGO)
- The issue is resolved** (CHICAGO)

The central screenshot shows a Yammer thread:

**David Hamilton**  
To All Company  
The packaging of the new juice bottles is really poor quality. They are difficult to remove from the pallet, and they're not easy to place on the display. We've got bottles rolling all over the place. This isn't making for a great customer experience.  
Like · Reply · Share · More · 3 hours ago

**Michael Pereira**  
I agree. We're having the same problem at our store. We've actually lost a few bottles because they are challenging to handle.  
Reply · Like · Share · More · 2 hours ago

**Yukako Souza**  
The bottles break very easily, too. The manufacturer didn't appear to take into consideration how hard these are to hold when they designed the packaging.  
Reply · Like · Share · More · 2 hours ago

**April Reagan**  
We've lost 2-3 packages of juice in the last 2 days. Each package of juice costs us \$40 in sales. We really can't afford to be presenting poor quality like this to our customers.  
Reply · Like · Share · More · 2 hours ago

**Antonio Alwan**  
Thank you for bringing this quality issue to our attention. I lead our Manufacturing and Sourcing teams. Vandelay is our supplier of this juice, and we have made them aware of the issues you are describing. We hope to have a resolution quickly. Thanks again for your feedback and please feel free to reach out to me with questions.  
Reply · Like · Share · More · 2 hours ago

**Antonio Alwan**  
Update – I just talked to our point of contact at Vandelay. They are concerned about these reports and have already put some plans in place to rectify the situation. They indicated that we can expect future shipments to be easier to handle and stock. Thank you for alerting us to this malfunction so we could react to it more quickly.  
Reply · Like · Share · More · 4 minutes ago  
👍 Jenny Liu, Peter Connelly, April Reagan and 4 others like this.

## Iterate

Driving adoption is a continuous cycle and doesn't end after launch day or measuring your launch impact. 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 particular business line.
- Periodically host additional engagement events, such as town hall style meetings or lunch & learns, to drive engagement in your organization.
- 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.

### Final thought

Remember, your business and the cloud are in constant motion. Seek new opportunities to improve business processes and empower people. 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.

 [roadmap.office.com](https://roadmap.office.com)

 [blogs.office.com](https://blogs.office.com)

## The complete checklist for the adoption process



### Step 1: Set vision & identify business scenarios

- Identify key stakeholders and put your team together
- Conduct a visioning exercise to help set your vision
- Conduct a business scenarios workshop to help identify your scenarios
- Get an executive sponsor for your adoption project



### Step 2: Prioritize solutions & create an adoption plan

- Define solutions by mapping Office 365 capabilities to your scenarios
- Start small, keep it simple: prioritize solutions and build a phased approach
- Kick off a champion program to help gather feedback, scale, and drive organic adoption
- Pilot the solutions and communications with champions and gather feedback
- Create your adoption plan including a set of communication, training, and community activities



### Step 3: Commit resources & execute on adoption plan

- Pilot/Pre-Launch Phase: Drive awareness before launch to setup expectations, drive a sense of anticipation, and answer questions
- Launch Phase: Support organizational roll-out during the launch week and open feedback loop
- Post Launch Phase: Stay engaged, sustain momentum, and measure progress



### Step 4: Measure, share success & iterate

- Keep measuring progress over time and identify successes
- Share successes to help broaden adoption among other teams and departments
- Identify areas of improvements and new set of business scenarios for your organization
- Follow the Office 365 Public Roadmap to learn more about upcoming features

Download all available resources

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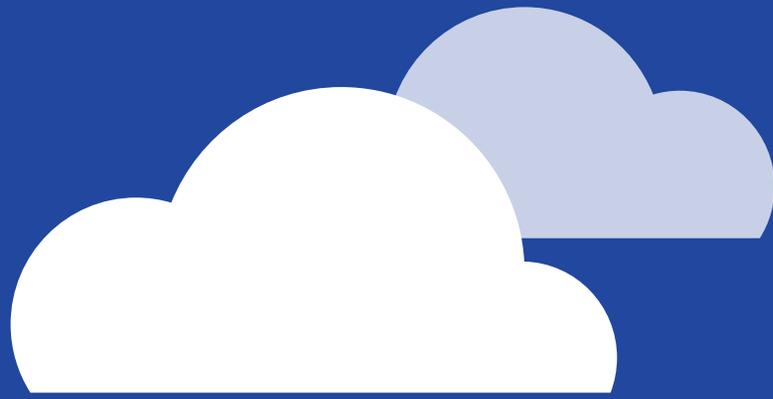


Join the conversation  
on Yammer

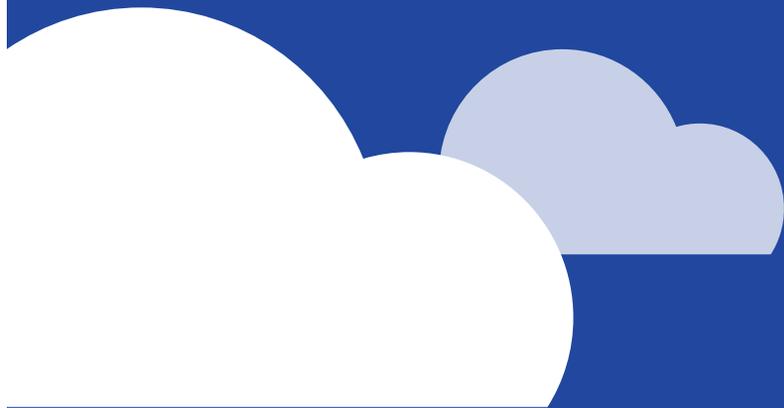
[aka.ms/Office365Network/DrivingAdoption](https://aka.ms/Office365Network/DrivingAdoption)

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