



Digital Transformation & Employee Engagement How to Make it Happen with Office 365

Ryan Thomas

12/12/18

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Ryan Thomas

CEO, Timlin Enterprises

Over 20 years enabling customers using Microsoft technologies

<https://www.timlinenterprises.com>



It's Not a Project or a Problem You're
Fixing.

It's a Journey.

Digital
Transformation:
Deliberately



It Starts and Ends with Your Users:
Provide the best possible proactive and reactive support for them

It is People-focused,
NOT Technology-
focused

The Process Begins with a Vision



Start with a **strategic vision**

Gather people who **care** to identify:

Where are you now

What you want to see accomplished

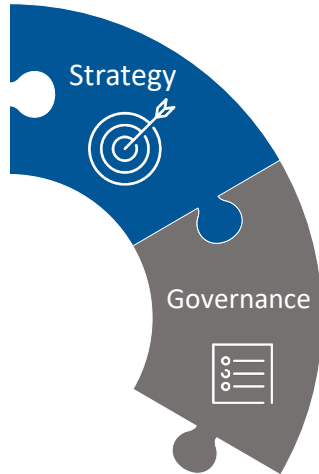
What will provide value to your people

This will **change** as your org, culture, and available technology shift – *Don't be Blockbuster Video or Polaroid...*

Start at the top – but know the magic happens at the bottom.

Remember – YMMV – Be **ADAPTABLE!**

Not Your Grandfather's Governance



It's about **defining the rules of the road**: laying the pavement, putting up guardrails, and creating on and off-ramps.

Involve key stakeholders to

Identify roles and responsibilities throughout the process

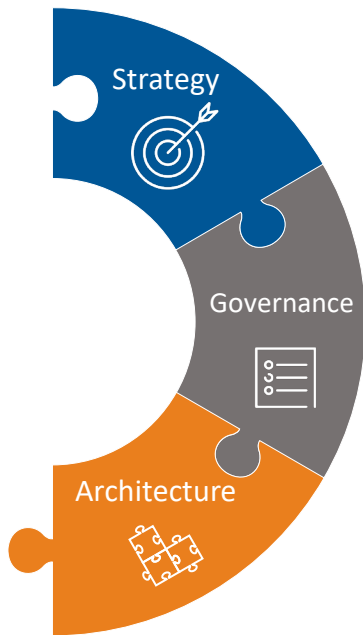
Ensure required policies are identified and baked into the architecture

Collect feedback and analyze what's working, measurables, changes to vision, culture, or platforms, etc.

Not talking about formal policies and security rules with this Governance

Road Map

Design Beyond Functional Specs



It's **NOT** functional specifications, site columns or content types.

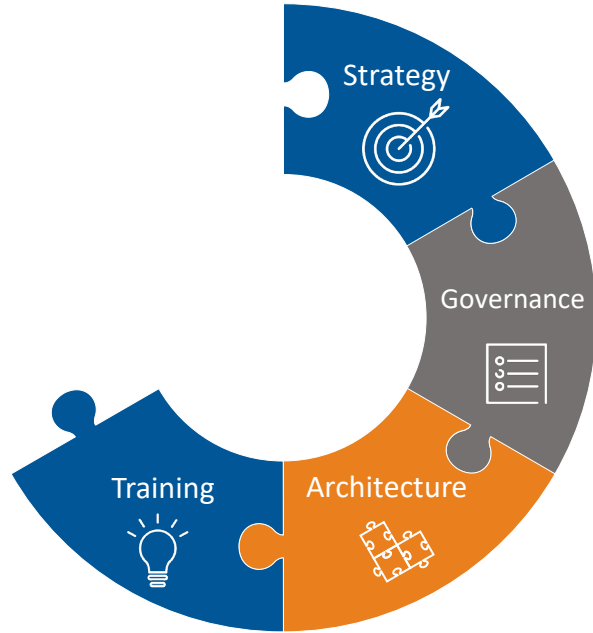
It's designing for **Intranet**, Collaboration, Project Management, Teams – *How to provide locations for activities that...*

It's aligning with **Governance** – *How to provide tools in a structured way that align with your vision?*

Identify roadmap items: Vision, Guidelines, Administration, Training, Support, and Feedback.

Designing for **capabilities**, not applications.

Training: Taking a Standard Class Isn't Enough



Training is **NOT** sending a few administrators “Office 365” classes.

Training creates **awareness**

Training is **contextual** and personalized.

Training is based on the **roadmap**.

Training is offered **repeatedly**.

Training dictates **proactive** follow-up and future roadmap items.

Training requires **feedback**.

Training content **MUST** change over time.

Training done in **real time**

Setup & Administration Should Then Be Easier



Easiest to do ***IF*** you have done the previous steps correctly.

If not, this is like **shooting in the dark**.

Governance, Vision, Measurables, Road Map, Design, Training plan all essentially guide what a **“build”** should be.

A Build has changed to **“initial configuration”** in many ways.

Spend a lot of **time** reviewing Office 365 changes, user feedback, and ongoing adjustment to the setup. Stale = Failure

Support is Where the Transformation Will Happen



Support is where the majority of DT will come from.

You **MUST** be there when someone needs help, it's your best opportunity to move the needle.

Best opportunity to **TRAIN** users on specific capabilities. Building Blocks

Support **staff** must be prepared for the implementation. Do not consider them an after-thought. They are the tip of your spear if you truly want to transform your organization.

Support is **proactive**, following up builds trust, makes knowledge stick, and prevents Shadow IT.

Final Thoughts



The **process is cyclical** by design – It works because you stay on it, be prepared to revisit often

Each small **problem solved** is a step in the right direction

Maturity levels increase over time

Platform changes over time

Common Question: HOW to ensure this all happens?

Build a Playbook!

We use Microsoft Teams / SharePoint, but even a pencil and paper can work

A woman with glasses is smiling and looking towards the right. She is wearing a white top and has her hands clasped. The background is a blurred office environment with other people working at desks.

You aren't the architect, you're the guide.

Remove roadblocks and allow it to happen –
It starts and ends with
your users.

It is difficult to see
the forest through
the trees – that's OK



Questions?

Thank You!

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