Real World Microsoft Teams Adoption and Governance

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About Me

- SharePoint and Office 365 consultant who specializes in easy to use solutions for simplifying and automating business processes.
- Federal client focused.
- Project Management background, PMP.
- Avid blogger at www.melihubb.com
- Gardener, runner, retired Muay Thai fighter, new cat person, and mother of wild toddler.
- Angry End User in past life.
What is Teams?
What is Teams?

- Chat based collaboration work space meant from a group of people within an organization that work together closely.
- Integrates with other Microsoft and third party services.
- Each Team gets a SharePoint site and a group.
- Skype for Business integration.
- Mobile app and desktop app.
- One app to rule them all?
Components

- Channels
- Tabs
- Connectors
- Bots
Channels

- Keep conversations organized
- One General channel by default
- Favorite and follow channels
- All members of a Team have access to ALL channels
- Every channel gets an email address. Creates a conversation in Teams.
- Folder in SharePoint document library
- Up to 100 channels per Team
Tabs

• Brings tools and services your Team uses regularly into a channel.
• Tabs are added to Channels and appear in the top navigation of the Channel.
• Files tab connects to the Team SharePoint site.
• Containers
Connectors

- Services you can connect to inside of a channel.
- Need to authenticate and provide credentials to the service to connect.
Bots

- Automated programs that are set up to respond to queries or give updates and notifications about things you want to stay informed about.
- Use chat based commands to perform an action.
- T-bot comes with Teams and provides information and FAQ about Teams.
- The Bot directory contains pre built Teams bots.
- Ability to create a custom bot.

Bots can make you even more productive by helping you complete tasks directly in a conversation! @mention any of the bots below in a channel belonging to this team to get started.
Pitfalls to Avoid

- Creating too many Teams causing confusion for end users about where to collaborate on what.

- Losing content and frustrating end users when Teams end up needing to be split up, consolidated, or disbanded due to lack of planning and governance.

- Failing to pay attention to features that may not be in compliance with your organizations regulations prior to roll out then needing to disable them after they have already been adopted.

- Confusion and underutilization from not providing training and materials to Team Owners and Team Members.
Organization

- Plan the organization prior to roll out but have a plan in place for how to handle changes and additions.
- Know when to create a Team and when to create a Channel.
Organize Teams by Department

- **Human Resources**
  - Channels:
    - Staffing
    - Performance Reviews
    - New Employee Onboarding

- **Finance**
  - Channels:
    - Budget
    - Payroll
    - Audits

- **Information Technology**
  - Channels:
    - Software Development
    - Security
    - Testing

- **Marketing**
  - Channels:
    - Sales
    - Promotions
    - Social Media
Organize Teams by Project

- **Project 1**
  - Channels:
    - Project Management
    - Communications
    - Stakeholders
    - User Acceptance
    - Best Practices
    - Testing

- **Project 2**
  - Channels:
    - Scheduling
    - Staffing
    - Stakeholders
    - Quality Assurance

- **Project 3**
  - Channels:
    - Team Lunch
    - Scheduling
    - Quality Assurance
    - Stakeholders
    - Testing

- **Project 4**
  - Channels:
    - User Stories
    - Deadlines
    - Project Management
    - Stakeholders

- **Project 5**
  - Channels:
    - Development
    - Change Board Reviews
    - Project Management
    - Design

- **Project 6**
  - Channels:
    - Documentation Review
    - Communications
    - Quality Assurance
    - Design
# Roles and Responsibilities

<table>
<thead>
<tr>
<th>Role</th>
<th>Responsibilities</th>
</tr>
</thead>
</table>
| **Collaboration Leader, Guide, and Decision Maker** | • Creates, manages, and regulates processes for how Teams will be implemented and maintained  
                                            | • Ensures organization security and compliance rules are met.  
                                            | • Makes decisions about which Teams features to use or disable.  
                                            | • Steps in when decisions need to be made about the organization’s use of Teams or other systems integrating with Teams. |
| **Collaboration Specialist(s) and/or Governance Board** |                                                                                  |
| **Office 365 Administrators**                | • Manages Teams configuration within the Office 365 tenant  
                                            | • Manages licenses  
                                            | • Monitors usage, security, and compliance reports. |
| **Team Owners**                              | • Manages team membership and content  
                                            | • Creates channels and tabs  
                                            | • First line of support for team Members. |
| **Team Members**                             | • View and contribute Team content                                               |
Permissions and Security

• By default privacy setting is set to Private.
• Teams has to be turned on tenant wide but the license can be disabled for individual users.
• All of the same security related principles of the Office 365 Trust Center apply to Teams:
  ➢ Data loss prevention
  ➢ Auditing and retention policies
  ➢ eDiscovery
  ➢ Data spillage management
Email Integration:

- By default all channels get an email address and anyone can send emails to the channel email address.
- Configurable on a per Channel basis.
Features to Review

External Apps and Cloud Storage:

• By default external apps are allowed.
• Pick and choose apps to allow.
• Choose from custom cloud storage options.

### Custom cloud storage

<table>
<thead>
<tr>
<th>Cloud Storage</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Box</td>
<td>On</td>
</tr>
<tr>
<td>Dropbox</td>
<td>On</td>
</tr>
<tr>
<td>Google Drive</td>
<td>On</td>
</tr>
<tr>
<td>ShareFile</td>
<td>On</td>
</tr>
</tbody>
</table>

### Apps

- **Enable/disable default apps**: On
- **Name**: On
- **Website**: On
- **Allow external apps in Microsoft Teams**: Off
- **Allow sideloading of external apps**: Off
  - **Name**: Off
  - **AceBot**: On
  - **Atal**: Off
  - **Airbrake**: Off
  - **Aircall**: Off
  - **AppSignal**: Off
  - **Asena**: Off
  - **Assistant @ Zoom.ai**: Off
- **Enable new external apps by default**: On
Features to Review

Messaging:

- By default users can edit and delete their own messages.
- Private chat can be turned off.
- Control the messaging experience including the memes, stickers and gifs.
Features to Review

Meetings:

• May want to disable if organization uses another meeting tool.
• Ad hoc meetings within a Channel allowing for end users to join at leisure when they notice a meeting going.
Features to Review: External Users

• Ability to collaborate with people outside of your organization.
• Admin must enable the guest feature.
• Must have a license and Azure active directory account.
Driving User Adoption

➢ Consider a pilot
➢ Identify advocates
➢ Set up tabs thoughtfully prior to roll out
➢ Stop duplication!
➢ Hold training
➢ Check in regularly with users
➢ Have fun 😊
Basic concepts all users should understand:

• How to access their Teams
• What Channels are and how to use them
• How to have private chat, group chat, and create and contribute to conversations
• How to access and share files
• How to schedule and attend meetings
• When notifications are received and how to manage them
Questions
Grant Thornton Public Sector

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