

A circular inset image showing a person's hands on a laptop keyboard and mouse in an office setting. The laptop screen displays a website with various icons and text. The background is blurred, showing other people in an office environment. The entire scene is framed by a solid blue circle and a dashed red circle.

Microsoft Teams in Professional Services organisations - top tips for a successful roll out

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INTRODUCTION

Due to the dynamic nature of the work they do, having a remote workforce in professional services and legal organisations isn't an entirely new concept.

The global Covid-19 pandemic, however, has pushed the remainder of the workforce who were primarily office-based to have to work from home. Like most sectors, legal and professional services companies have a mixed approach to IT; some have a cloud-first strategy, others are heavily on-premise while some employ a hybrid set up. Whatever the approach, Covid 19 has impacted IT business strategy so that companies are now being pushed to become more "cloud-friendly".

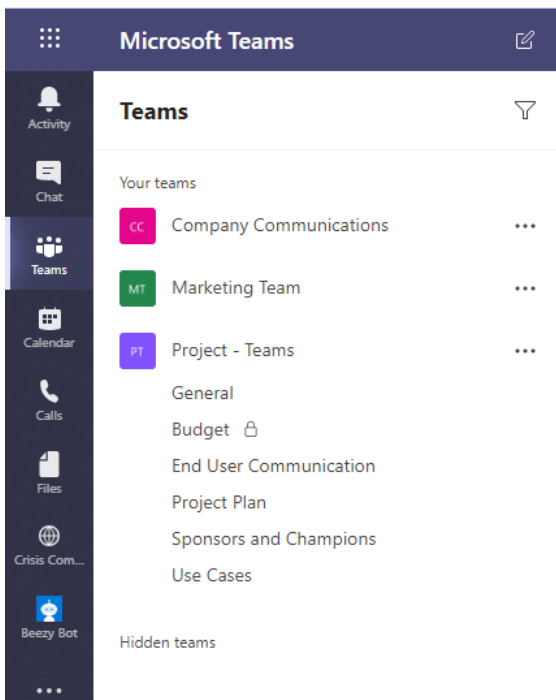
The first hurdle in remote working, is ensuring that employees have the correct tools to be able to access the information they need to do their job. Microsoft Teams has been a significant product in providing this service to businesses of every kind. Microsoft Teams is a secure cloud platform which provides a collaboration space for employees to interact and communicate with one another and collaborate on projects from any location. Its popularity and usage has increased dramatically during the Covid-19 pandemic; but for companies that are new to the solution, the big questions is: where do you begin?

Core has identified a few main areas which need to be considered during a Teams roll out:

- Use cases
- Security and governance
- Sponsors and champions
- Business key performance indicators (KPIs)
- End user communication and training

For any successful technology implementation, it is crucial to think about why this change will be beneficial for the end user. Humans, in general, do not like change. So, you need to ensure you have a compelling reason for them to embrace the changes that are happening. Once you have identified “the why” – that it will help your staff do their job easier / better - there will be less problems with the project further down the line.

CREATING A TEAM



This screenshot shows a team and channels for the project “Teams”. The channels cover the key topics for this project, which will have different content and need to be considered for each stage of the implementation.

From a governance perspective, you need to determine internally who you want to be able to create a team. Creating a team also creates

multiple workspaces and items in different Office 365 projects, which can lead to infrastructure problems for your IT team. The correct process for you, and whether you prefer a more organic or governed IT approach, will likely be determined by your company culture.

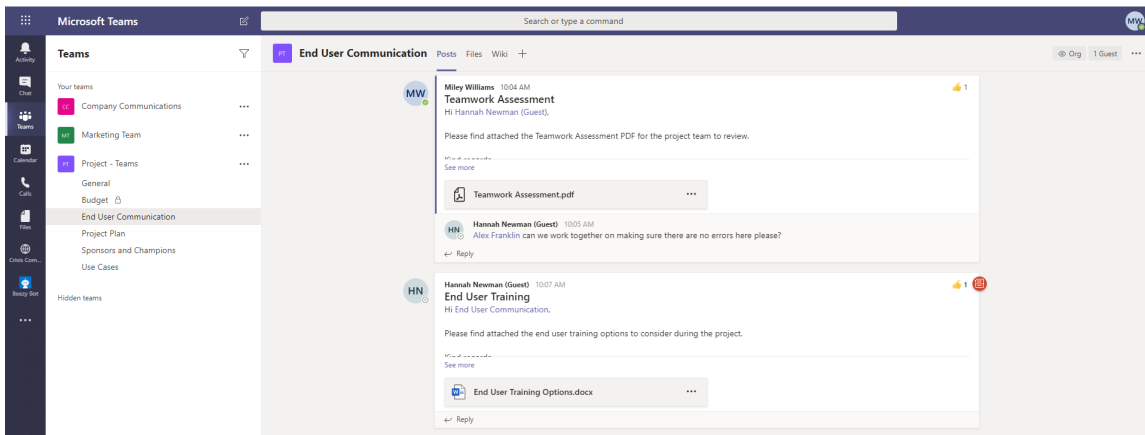
You will also notice that one of the channels has a padlock symbol next to it. This means that users must be invited to view the content in that specific channel. Even if you are in the “Project – Teams” team, you will not be aware that the channel exists unless you have been included.

SHARING CONTENT

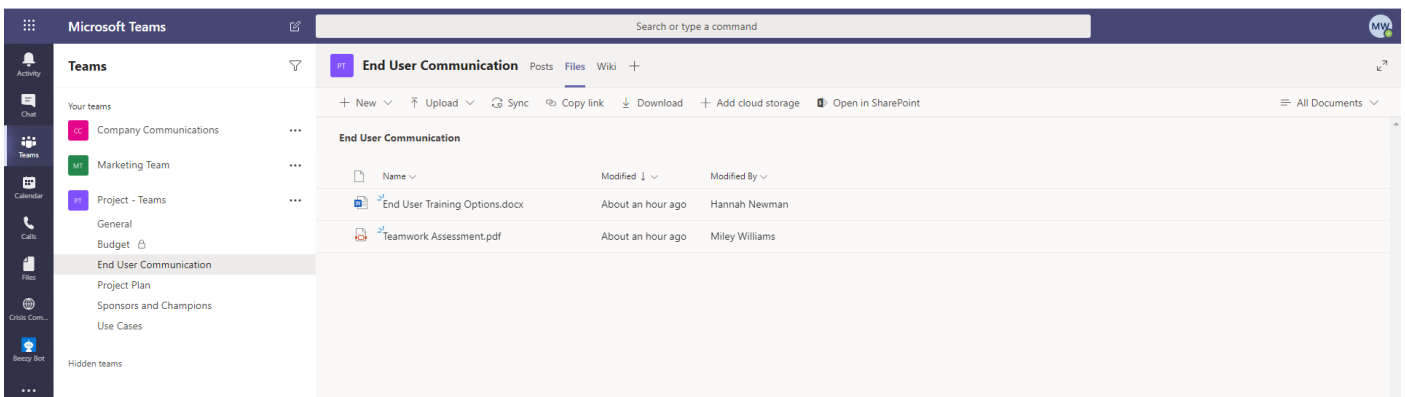
Sharing content within Teams and Channels

Teams has multiple spaces where users can share content. While this is beneficial in many ways, it can also be hard to know where the best place is to share your documents and ideas.

Firstly, users can share content in every channel that makes up a team by starting a conversation, adding a subject and attaching the document. Core advise adding a subject so that content is easier to find retrospectively.

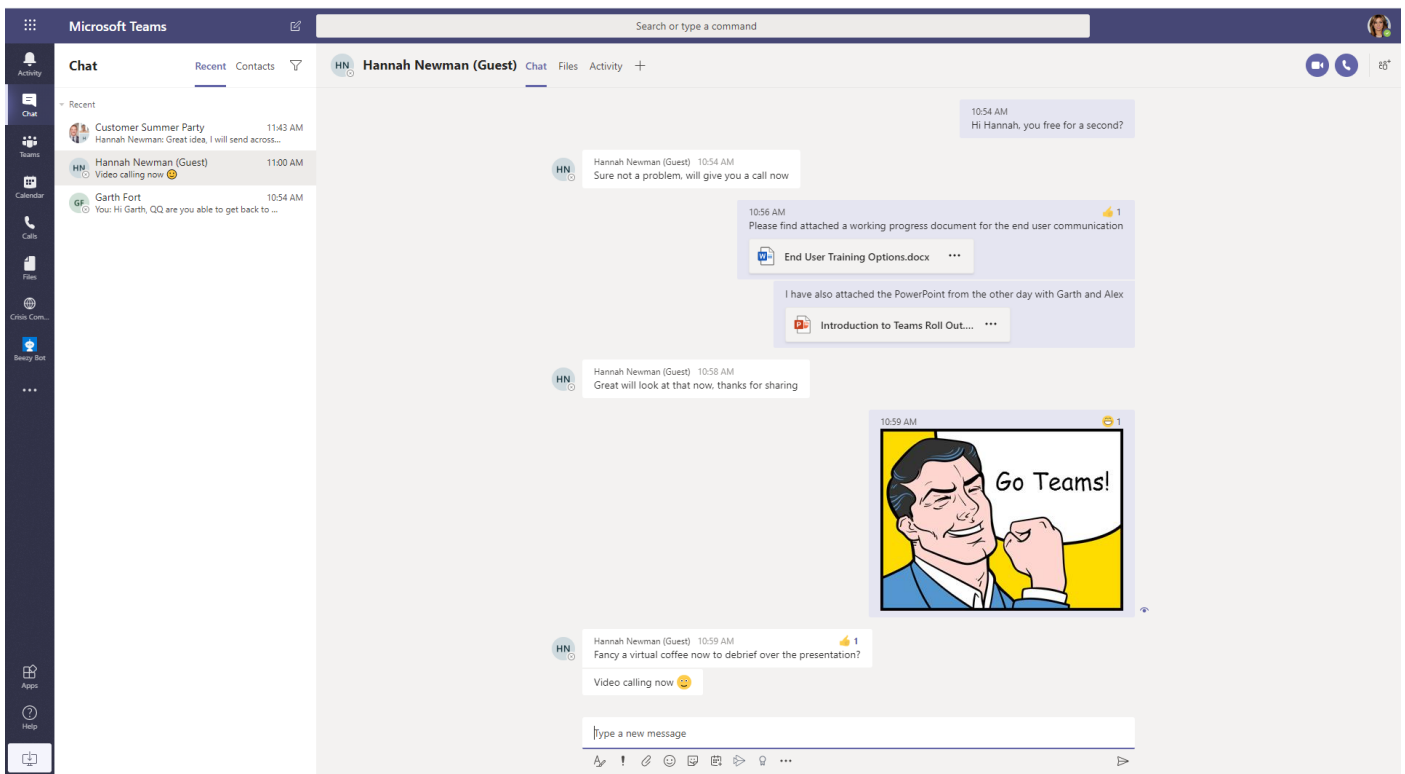


When a channel is created, a “Files” tab is automatically created. Here, you can find a list of all the documents which have been shared within that channel. As Teams is essentially a window into SharePoint, the document management features of SharePoint - such as last modified, by whom and version history etc. - are also visible in Teams.



Sharing content within Chat

Chat is a useful but often overlooked function in Teams; it is sometimes perceived as a purely social function. While this is not necessarily a bad thing, especially in times of COVID-19 and the importance of maintaining the social wellbeing of your employees, there are also more formal use cases. Chat lets your users ask quick questions or give brief updates when an email may perhaps be too formal, for example, “are you free for a call?” or “do you have the presentation I missed the other day?”



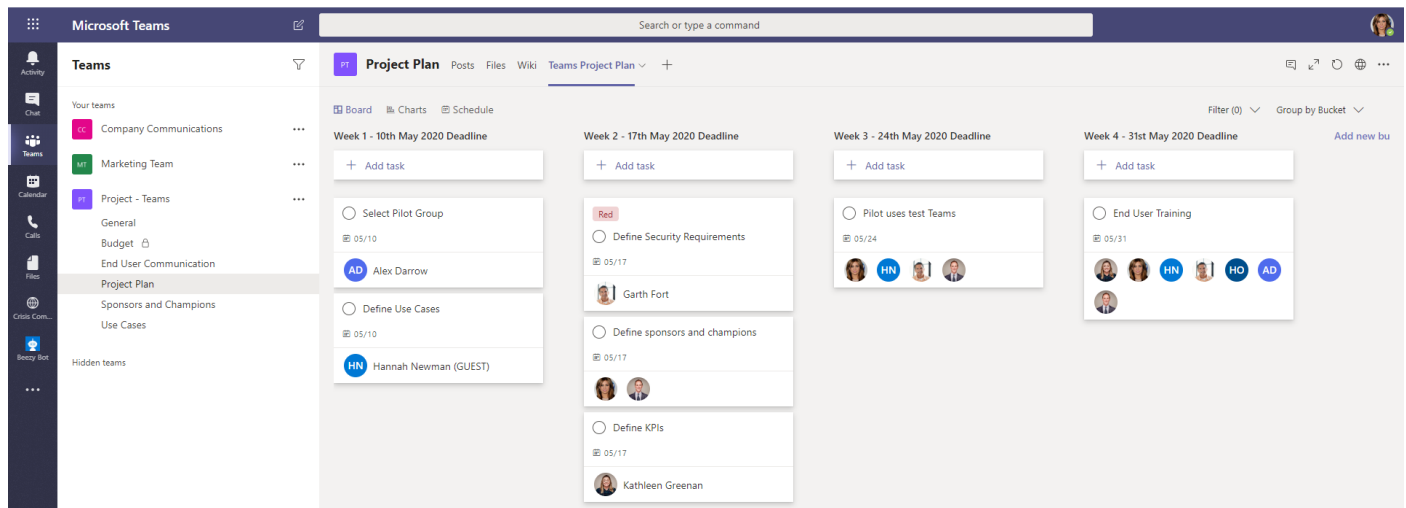
When a new chat is created, a “Files” tab is also created which shows all the documents and files shared between members of the chat. Where it differs from sharing within a channel, is that this documentation is stored within OneDrive and not SharePoint.

Sharing content within chat may be useful for documents which are “work in progress”, and which will later be published within a channel for the wider team to review. It can also be for documents which are only relevant to the members of the chat.

Chat can also be useful for orchestrating one-off tasks amongst a set group of people, when the justification to create a whole new team does not exist, for example, to organise a customer summer party. In this instance, you would need a dedicated space to collaborate, but not an entirely new team. One good rule of thumb, is “more channels, less teams.” Following this advice makes Teams easier to govern and control.

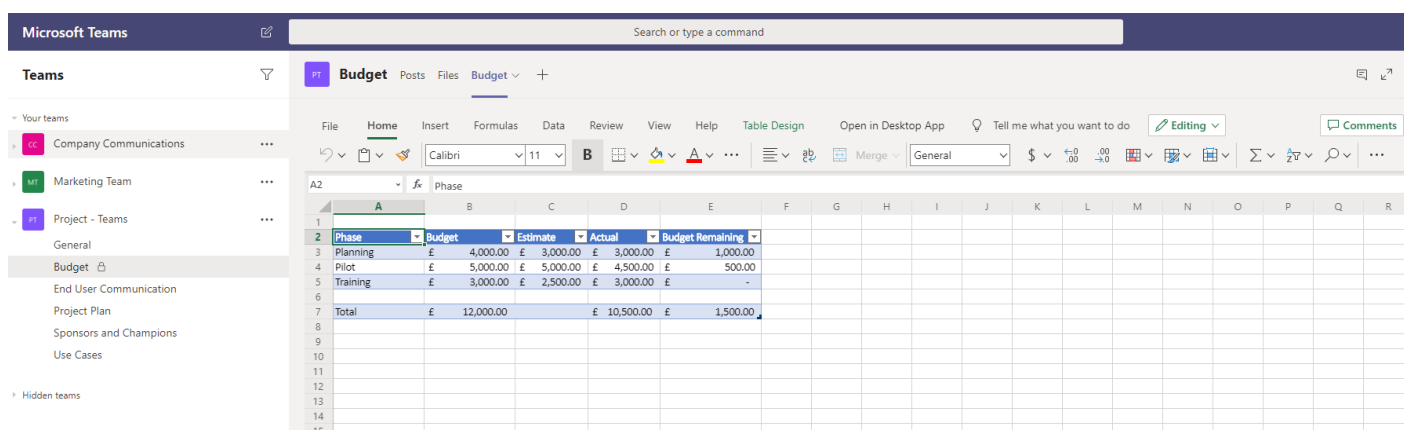
OFFICE 365 INTEGRATION WITH TEAMS

Microsoft has developed Teams to make it easy to integrate with other products within Office 365. In the screenshot below, a Teams user has integrated Planner for their “Project Plan” channel, in order to track tasks across the project.



Planner has the ability to assign tasks to individuals, set deadlines, flag tasks with different labelling (such as red for important) and even has in built functionality to chase people when a task is nearing the deadline date. The tool is end user friendly, and gives time back to those managing the project, so that they can focus on less admin-driven activity.

In the screenshot below, you can see that an Excel spreadsheet has been added within the private channel, “Budget”, and added as a tab to the channel so that everyone has easy access to it. As mentioned, only those people who have permission to be in the “Budget” channel will have access to the Excel spreadsheet. If you have not been invited to the channel, then you will not know it exists.



SECURITY

One of the major advantages of Office 365, is that it allows users to access data anywhere, at any time. Ironically, though, its biggest selling point is also its largest downfall, from a security perspective.

To combat this, Azure Information Protection (AIP) was created. This tool classifies documents, teams and SharePoint sites. The classification label applied to the entity restricts what can and cannot be done with the content.

It is recommended that organisations have no more than four labels, as this can affect the chances that a user will use the label. Limiting the number of labels also leads to less confusion over which label should be associated with a document. The labels and policies you apply are down to your organisation's preference. For example, you could have:

- Highly Confidential - the document/site is not able to be accessed by anyone outside the organisation. The document/site cannot be printed, or screen shot.
- Confidential - only a certain list of people has access to the content and are able to print but cannot forward outside the address list.
- Public - anyone can access the content.

Once the label has been applied to the team, this will flow down to all the content included in that team. Labels can be applied at both a Global admin level and at team "Owner" level to provide flexibility, but in accordance to company guidelines.

GOT QUESTIONS? WE'RE HERE TO HELP

If you think Microsoft Teams could help your company be more productive, connected and collaborative, Core can help make this vision a reality.

From initial planning to implementation and ongoing support when you're using Teams, we can support and guide you at every stage of your Teams journey.



Hannah Newman

If you have any questions about using Teams in a professional service setting, speak to our Legal and Professional Service Account Manager, Hannah Newman.

Email: hannah.newman@core.co.uk

