

Service Provider Assessment

Activation and Onboarding for Microsoft Teams



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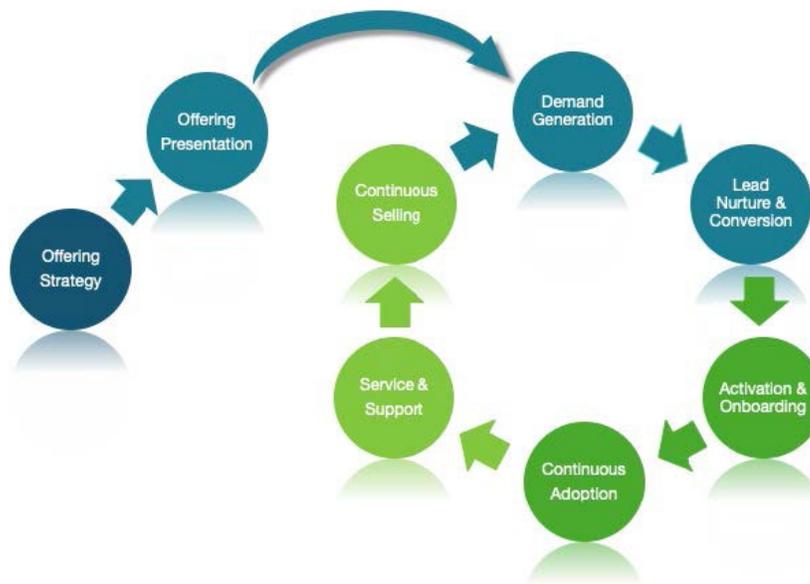
Who is Mural?

We are strategic and operational experts in helping global Service Providers succeed in delivering software-as-a-service (SaaS) solutions to their business customers. We've empowered over 400,000 business customers across 15 years of operational excellence.

What is This Assessment and Who is it For?

Through more than 200 Service Provider engagements, Mural has defined an action and measurement-oriented **Critical Success Factors (CSF) Framework** as the foundation of optimizing the performance of SaaS businesses. This framework is the foundation of how our customers achieve a differentiated level of success in their markets.

All Mural engagements are built around these 8 CSFs, of which Activation and Onboarding is the step directly after a successful conversion, but is absolutely critical to ensure maximum value.



These Critical Success Factors are grouped into three reinforcing phases for a business.

- Plan & Build
- Sell & Activate
- Drive Lifetime Value

This assessment is directly targeted at the Activation & Onboarding Critical Success Factor for Microsoft Teams, part of the Microsoft 365 / Office 365 suite. It is designed for Service Providers with an existing offering who are seeking the practical steps to take to drive adoption, increase customer satisfaction and reduce churn in order to maximize lifetime customer satisfaction, and value.

Objectives

In this assessment, you will:

1. Understand the primary goal of the SaaS Activation & Onboarding steps and its relationship specifically to Microsoft Teams.
2. Review how to most explicitly measure the achievement of that primary goal.
3. Honestly evaluate your current business against a set of three key process areas that, if embraced and optimized, will drive success against that goal.

In all Mural engagements, we leverage the entire CSF Framework to drive success.

Please contact us if you'd like more detail on other CSFs or to learn more about Mural.

#1 The Primary Goal of Activation and Onboarding

An optimized "Activation & Onboarding" CSF - and all associated communications, processes and measurement - is focused on ensuring customers realize a minimum (though hopefully greater) level of product value within the first 60-90 days, where achieving product value is correlated to influencing lifetime customer value.

While the 60-90 day timeline is flexible, Mural's experience demonstrates that habits, expectations and usage patterns are formed, brand conclusions are drawn, and solidified and satisfied customers are most talkative in that period.

Take Action

Take a moment to answer the following.

Assessment Question	Answer
Does your company have a defined strategy and set of minimum product usage requirements for Microsoft Teams that correlates with long-term customer satisfaction and retention?	
Is your existing Activation & Onboarding process focused or driven by ensuring customers gain experience with those usage scenarios and matches their business objectives?	
Do you guide customers from more basic to more advanced experiences in a logical manner, replacing the firehose of potential support information with a consumable drip of what's next?	
Do you flag and take action to address customers who are not at your defined thresholds of usage and adoption?	

#2 Measuring the Goal - Minimum Required Value (MRV)

In this assessment, we've established a baseline set of MRV features in Microsoft Teams, but be aware that, per the Offering Strategy CSF, these sets should be customized based on customer market segment/industry for example, a technology consulting firm has a different set of core features than an accounting firm. So while this is a head start, we strongly recommend going through the full CSFs process to ensure that you are following best practices.

For Microsoft Teams, a core MRV feature & use-case list is allocated across three customer-user roles: Admin, Team Leaders, and Individual Contributors. Our Activation & Onboarding Goal is to, at a minimum, drive these outcomes.

Your target customers may have very different needs and circumstances can dramatically change what matters in a given moment. For instance, with the growth in remote workers in response to Covid-19, the primary value a customer wants may be effectively hosting web meetings with desktop sharing.

Take Action

For each item in the list below, describe what data and insight you have about adoption in your customer base today? Conversely, if you have your own MRV list do the same for it.

Customer Role	Microsoft Teams Use Case or Feature	What Data / Insight Do You Have Today?
Admin	Create a Team and invite team members	
Team Leader	Create Channels in a Team	
Individual Contributor(s)	Post to a Channel	
Individual Contributor(s)	Have a team meeting using Teams synced with Outlook calendar	
Individual Contributor(s)	Join a team meeting in Teams	
Individual Contributor(s)	Post a file to a channel and successfully edit in collaboration	

#3 Key Process Areas

The Key Process Areas are designed to simplify evaluation of current gaps in a CSFs and encourage a bias towards action.

- **Customer Communications & Engagement** — focuses on the methods and frequency of customer communication and other interactions designed to maintain customer momentum with respect to activation, education, and resulting adoption of the Microsoft Teams offering.
- **Education & Training** — focuses on both instructor-led training as well as self-guided training on Microsoft Teams use.
- **Activation Support** — focuses specifically on the level and methods of support engagement. Are you there for the customer when, where, and how they need you? Does your support organization have the required level of expertise and deliver 'Wow' moments that create an emotional connection with your customers?

For each of those KPAs, a simple matrix is provided below to assess the current state of your business and what to focus on next.

We recognize that many processes are interrelated and therefore one might directly influence another, but that does not minimize the power of the focus they provide. In our client engagements, we leverage this as a starting point from which to define detailed action plans, testing strategies and key measurements. **Contact us to learn more.**

Take Action

Based on the experience of your current customers, evaluate your organization according to your current maturity level.

Customer Communications & Engagement

Maturity Level	That Looks Like	You Should Focus on...
Inhibited	You've got an order confirmation email and basic instructions on setup and configuration for the Microsoft Teams Admin.	A series of time-based drip messages guiding the customer through the setup process, pointing to support resources, and offering in-bound support through regular channels.
Baseline	A standard set of communications is defined with links to the critical resources necessary for a customer to self-navigate getting started and attempt to educate their Microsoft Teams users.	Trigger-based communications that are driven by customer behaviors (or lack thereof) to guide them through milestones including communications focused on driving more value from the products/service.
Quantified	Core business data on customer satisfaction, revenue, churn, etc. is associated back to customer engagement with communications to determine what content the most successful customers consume and how to do more of that.	Tuning / optimization of communications channels (email, phone, text, in app), content types (text, video, PPT) and regular, data-driven testing of new messages.
Optimized	You regularly run cohort-based A/B tests across messages, content, etc. to maximize consumption.	Consistently watch for new features or changes that might require updates to your process to be ahead of potential confusion.

Education & Training

Maturity Level	That looks like	You should focus on...
Inhibited	You rely on the training help resources available in the product itself and provided by Microsoft on various portals and expect customers to discover what they need.	Map readily available third party content to the capabilities described in the minimum required value matrix. Leverage existing communications channels and assets to emphasize knowledge on the most critical use cases.
Baseline	Customers recognize they can trust you as a reliable referral source for educational materials, but do not look to you as the expert and therefore view the relationship as transactional.	Increase the depth of value you provide by augmenting with education and training that is unique to your organization. Potentially offer webinars or onsite training (free or paid) and create assets like hyper-focused videos (< 90 seconds) that are optimized for consumption.
Quantified	Based on your curated or custom made content, you actively review data on consumption and usage. You mine support ticket data and encourage customers to reach out to you with clarifications so you can understand when and how customers are most receptive to education.	Continuously tune the depth, content, format, and presentation order of educational materials. Iterate the education experience across industries and market segments based on earlier CSFs.
Optimized	Customers recognize you as a trusted educational partner for their journey with Microsoft Teams. They turn to you in their time of need and the training/education you offer is hyper-effective, digital, timely, reusable, and, therefore, low cost.	Leverage the trusted partner role into education that drives cross-sell and up-sell of additional products, including communications products. Use education to deepen functional adoption within an organization such that it forms the basis of business critical functions like client interactions.

Activation Support

Maturity Level	That looks like	You should focus on...
Inhibited	Your standard support team and processes are available 'as needed' for new customers. Newly activated customers wait in a queue alongside any other customer.	Offer activation and onboarding as a discrete experience with a unique method of contact. Explicitly encourage customers to take advantage of the support team to accelerate their time to value.
Baseline	Activating customers are uniquely identified and receive some degree of a priority experience. Primary focus is on functional setup of the product, not specific use case adoption.	Create a dedicated group within your support organization who are experts in Microsoft Teams adoption and onboarding. Offer scheduled activation and onboarding appointments (Red Carpet Onboarding) and leverage this experience to learn more about your customer and guide them to value realization faster.
Quantified	You can directly translate the impact of a higher-touch activation experience - and its costs - to the impact on churn and Office 365 upsell such that you can calculate a specific ROI for the action. Level of investment is optimized against that ROI and continuously evaluated against customer cohorts.	Look to leverage the customer insight gained from the Red Carpet Onboarding experience into a sales engine across your broader cloud services portfolio. Ensure adoption specialists are Subject Matter Experts (SMEs) have sales positioning training focused on scenarios they uncover and have targets to drive results.
Optimized	Recognizing both the opportunity but also the frailty of the first 60-90 days of a customer experience, you see, measure, and manage Adoption & Onboarding as an extension of the sales process, not a support cost, regardless of organizational location.	You are deeply focused on creating "Wow" moments for your customers throughout that 60-90 day period. You want them to feel personally connected to their adoption Ambassador and have those Ambassadors take spare time to do proactive outreach, share personal insights and demonstrate deep empathy for your customer's success.

Okay. Clearly we have work to do. What next?

We recognize there is a lot to digest in this assessment. We are committed to your success as a SaaS provider, and are eager to help. A Mural team member will follow up on your assessment results within one week. Typical next steps include:

1. 2-Day Business Development Session (BDS) where we go deeper into each CFS and emerge with a comprehensive plan for your Microsoft Teams and Office 365 offering.
2. Engage Mural's Operational experts to define an Activation & Onboarding process that your team can begin to execute with a focus on immediately measurable results.
3. Let Mural's experts run the Activation & Onboarding process for you.

Questions? We're here to help. Visit our [site](#) or send us an [email](#) to continue the discussion.



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