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Moving to remote work on Teams and SharePoint Online

Case Study

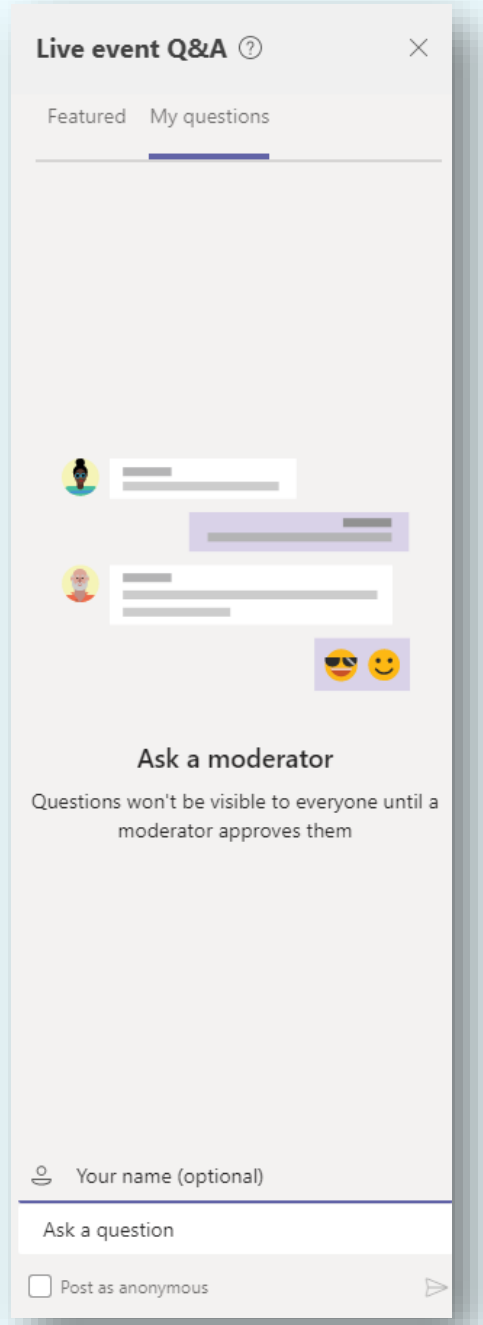
Gravity Union & the College of Physicians and Surgeons of Manitoba

July 15, 2021

www.gravityunion.com

Housekeeping

- Use the Q/A panel to ask questions or share comments throughout
- Slides and a recording will be shared tomorrow



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What we'll cover today

- [x] Introductions
- [x] Project Background, Scope and Approach
- [x] Technologies involved
- [x] Adapting our Methodologies for Remote Work
- [x] Guiding Principles and Success Factors
- [x] Project Outcomes – Enterprise, and WIIFM
- [x] Q&A

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Introductions

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Introductions

Your Speakers

Sam Lount, Director of IT

CPSM

Dylan Zimmerman, Project Manager

Gravity Union

About CPSM

- The College of Physicians and Surgeons of Manitoba is a provincial regulatory body that promotes the safe and ethical delivery of medical care by physicians
- CPSM registers, regulates, and reviews qualifications of medical doctors and facilities in Manitoba
- Each Canadian province has a similar College that performs a similar function – but some aspects of each College are specific to their home provinces

About Gravity Union

A boutique compliance-inspired services firm helping organizations in their digital transformation journey

Gold
Microsoft Partner

Microsoft

Gold Certified
Collabware Partner

collabware

Content Services Microsoft Partner

- Recognized by Microsoft for the success we deliver to customers with Microsoft Content Services technology
- Partner with Microsoft, providing feedback on the product functionality and roadmap
- Special support from Microsoft for our project work

Experience Overview

50+
Years of combined Collabware experience

10,000+
Users using our SharePoint and M365 solutions

40+
Microsoft certifications

25+
Collabware and Collabspace projects

250+
Years of SharePoint experience across our team

18
Collabware certified consultants

50+
Million documents migrated and managed in our solutions

100%
Project success rate

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About Gravity Union

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Best Workplaces in Technology
Great Place To Work.
CANADA 2020

Best Workplaces™ for Inclusion
Great Place To Work.
CANADA 2021

Best Workplaces™ for Start-ups
Great Place To Work.
CANADA 2021

Great Place To Work.
Certified
SEP 2020 – AUG 2021
CANADA

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2020 STANLEY CUP CHAMPIONS

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Project Background

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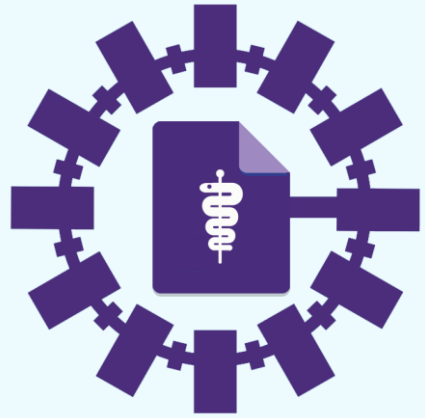
The DOCing Station Project

Scope

- **Strategy and Planning**
- **Setup & Implementation**
  - SharePoint Online & Teams
  - Collabspace
- **Operational Support**
- **File Plan Development**

Schedule

- **Approx. 1 year duration**
- August 2020 kickoff
- 2 months for planning
- Staggered department rollouts @ 2 months each



Effort

- **>1200 hours for Gravity Union**
- ~16-32 hours each for dept. staff
- Significant effort for CPSM IT

Resources

- ***GU:*** PM, BA, Architect, Advisor
- ***CPSM:*** IT Team, COO, Business Reps, Power Users

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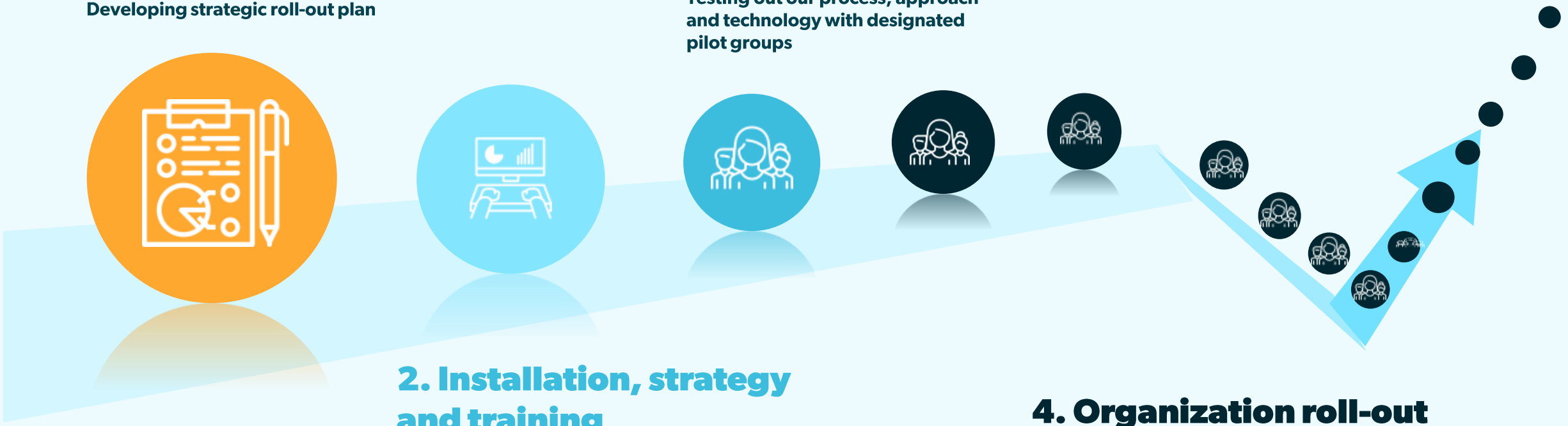
Project Approach Overview

1. Planning and preparation

Introductions, administration and housekeeping
Software and hardware procurement
Planning (project, communication, support)
Developing strategic roll-out plan

3. Pilot Groups

Testing out our process, approach and technology with designated pilot groups



2. Installation, strategy and training

Installing software, training core project team
Reviewing core strategies
Reviewing process and approach
Firming up project deliverables

4. Organization roll-out

Getting the rest of the departments on board

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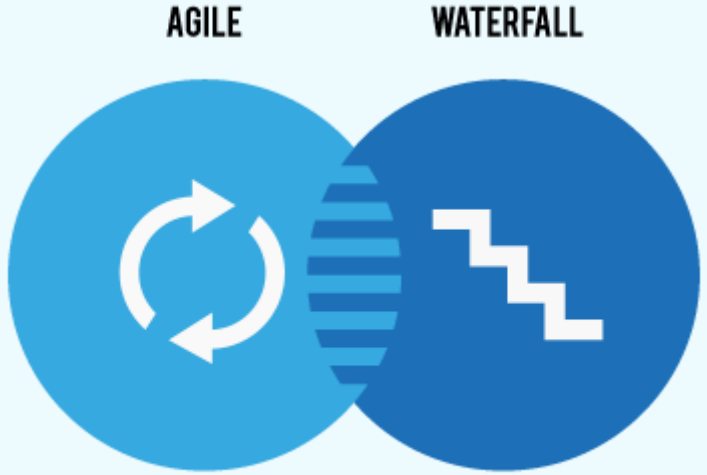
GU's SharePoint Rollout Process

- Agile Hybrid approach: iterative development within a repeatable, consistent rollout process
- Support for changes after go-live



Current State Requirements Assessment

Solution Design & Prototype

Testing & Enhancement

Content Migration

Go-Live & Retrospective

Training

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Technologies Involved

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Technology Overview

Solutions delivered:

- SharePoint Online
- Teams
- Power Platform
- Collabspace

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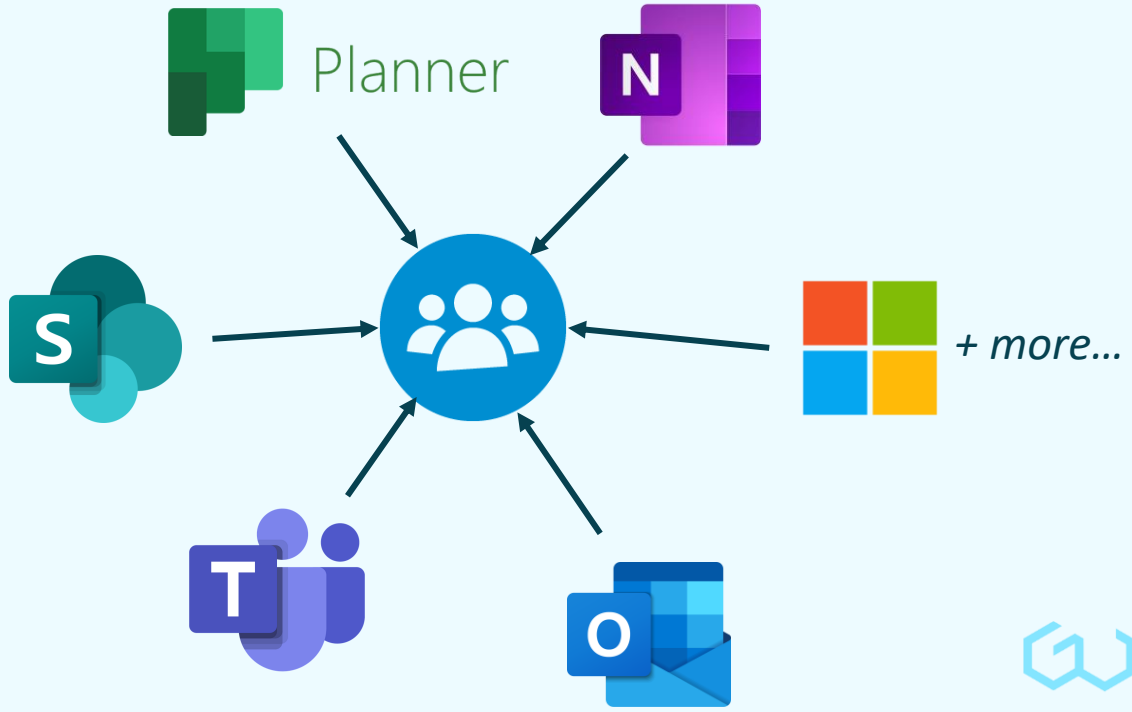
M365 Groups – Key Decision Point

- **SharePoint sites can be M365-group-connected, or not**



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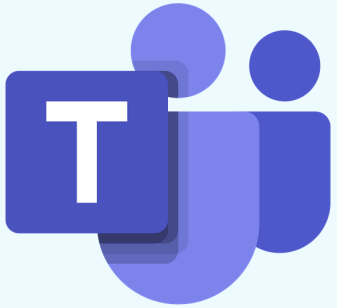
Technology Overview

Tools leveraged:

- Planner
- Mural
- XMind
- SharePoint Online
- Teams



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Adapting Methodologies for Remote Work

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Agile Project Management Tools

Kanban Board

- Invented by Toyota in Japan
- Dates back to 1940s
- Visually manage work, empower the team

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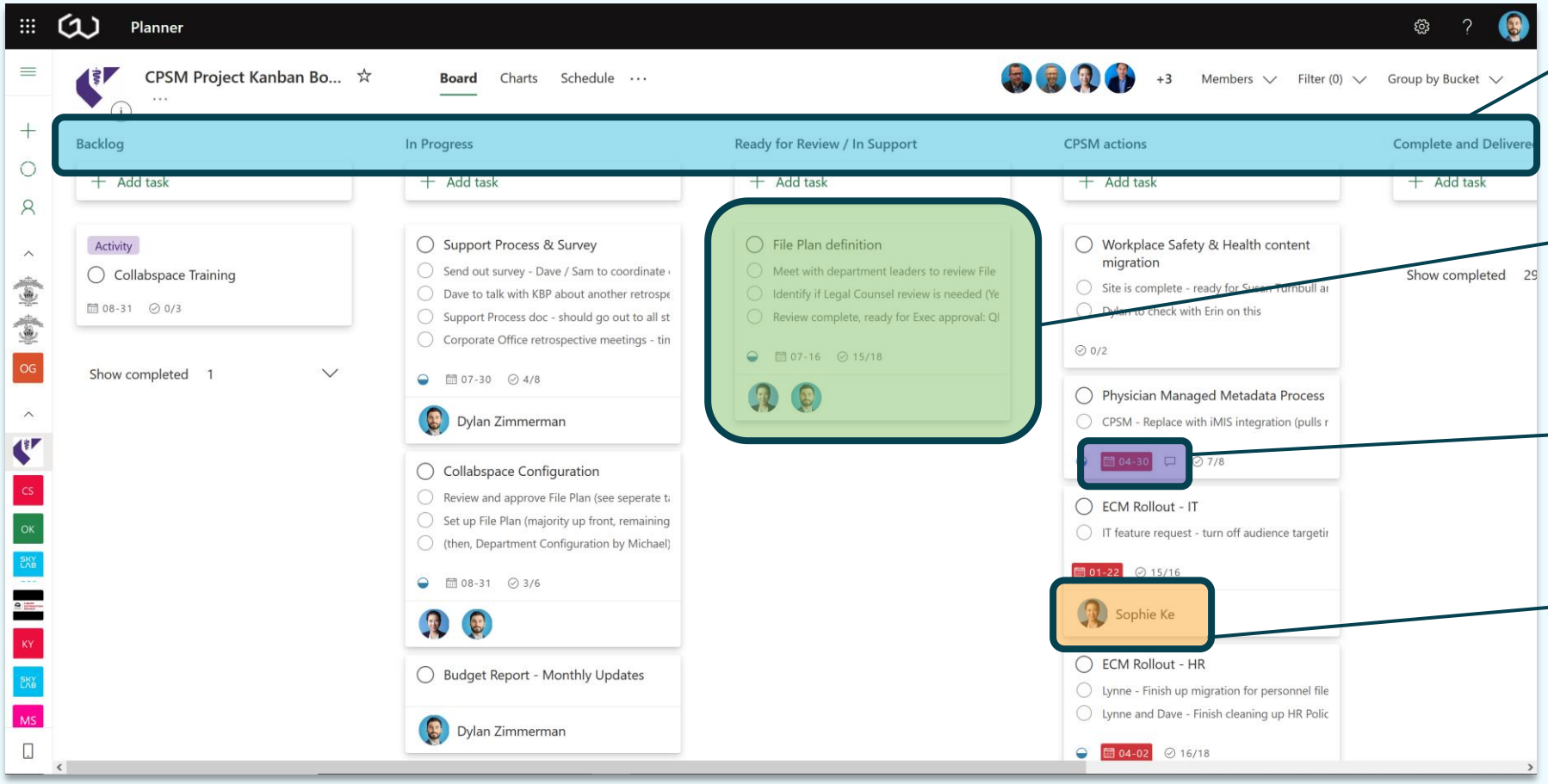
Remote Project Management with Planner



Activity Status

Task Cards

Due Dates

Assignments

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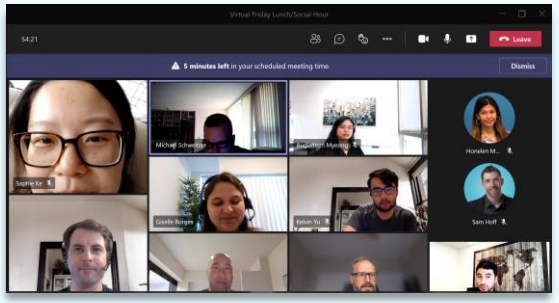
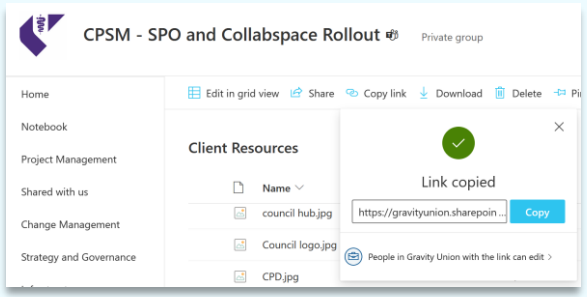
Remote Collaboration with Teams and SPO

- **100% of project meetings were remote via Teams**
  - Face to face is important
  - Sharing screens



- **All project documentation was stored in CPSM SharePoint**
  - Collaboration on deliverables
  - Sharing Status and Budget Reports



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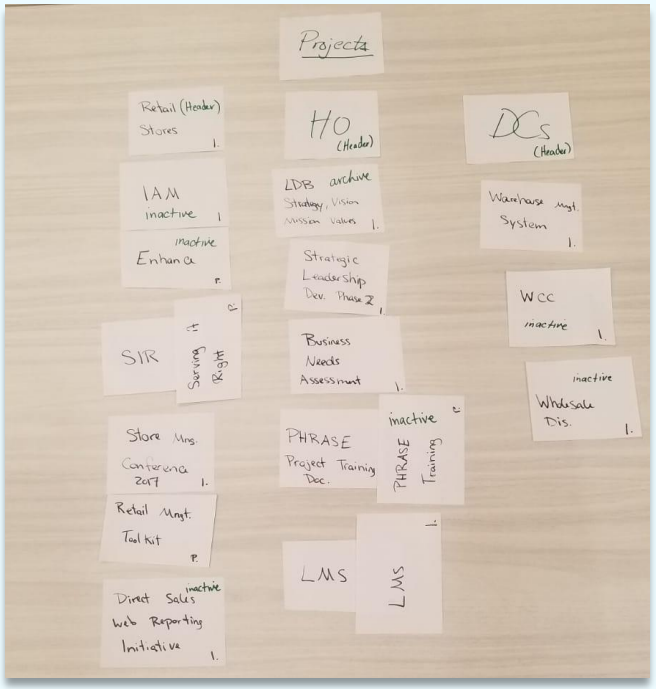
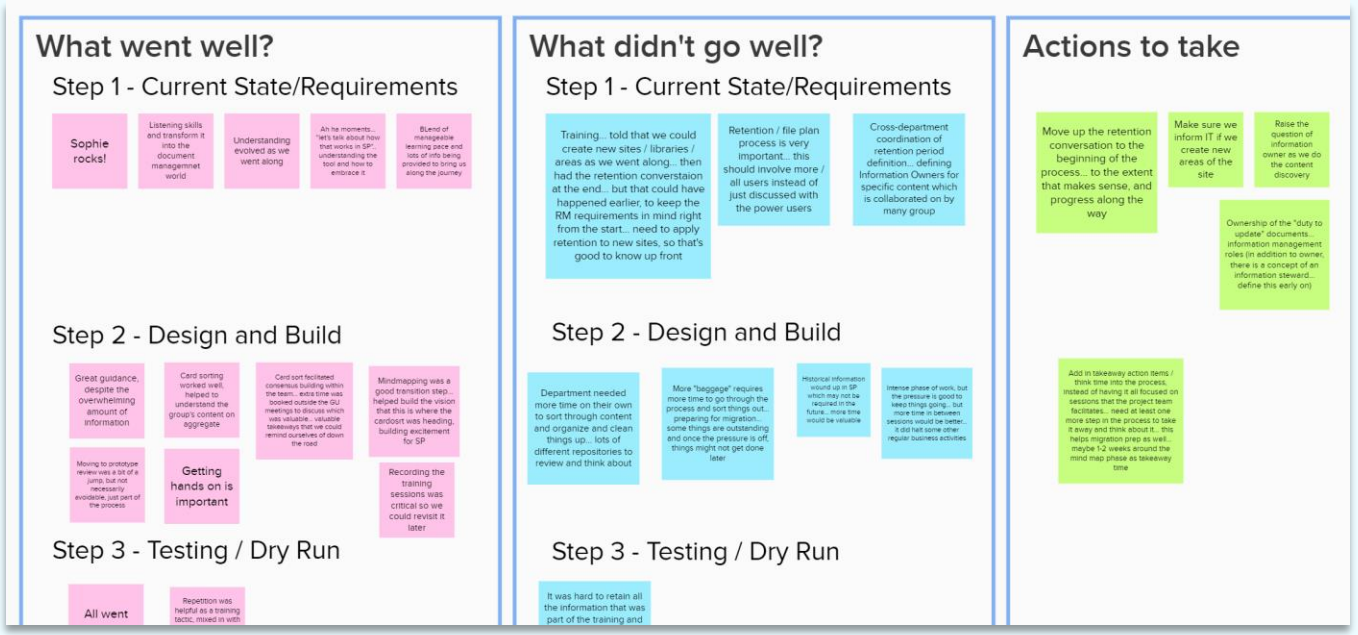
Remote Workshops with Mural

- **Primarily used for Card Sorting & Retrospectives**





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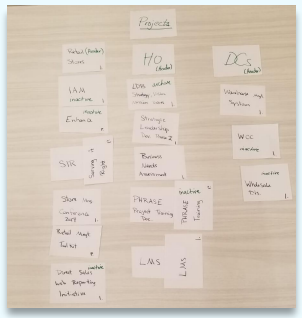
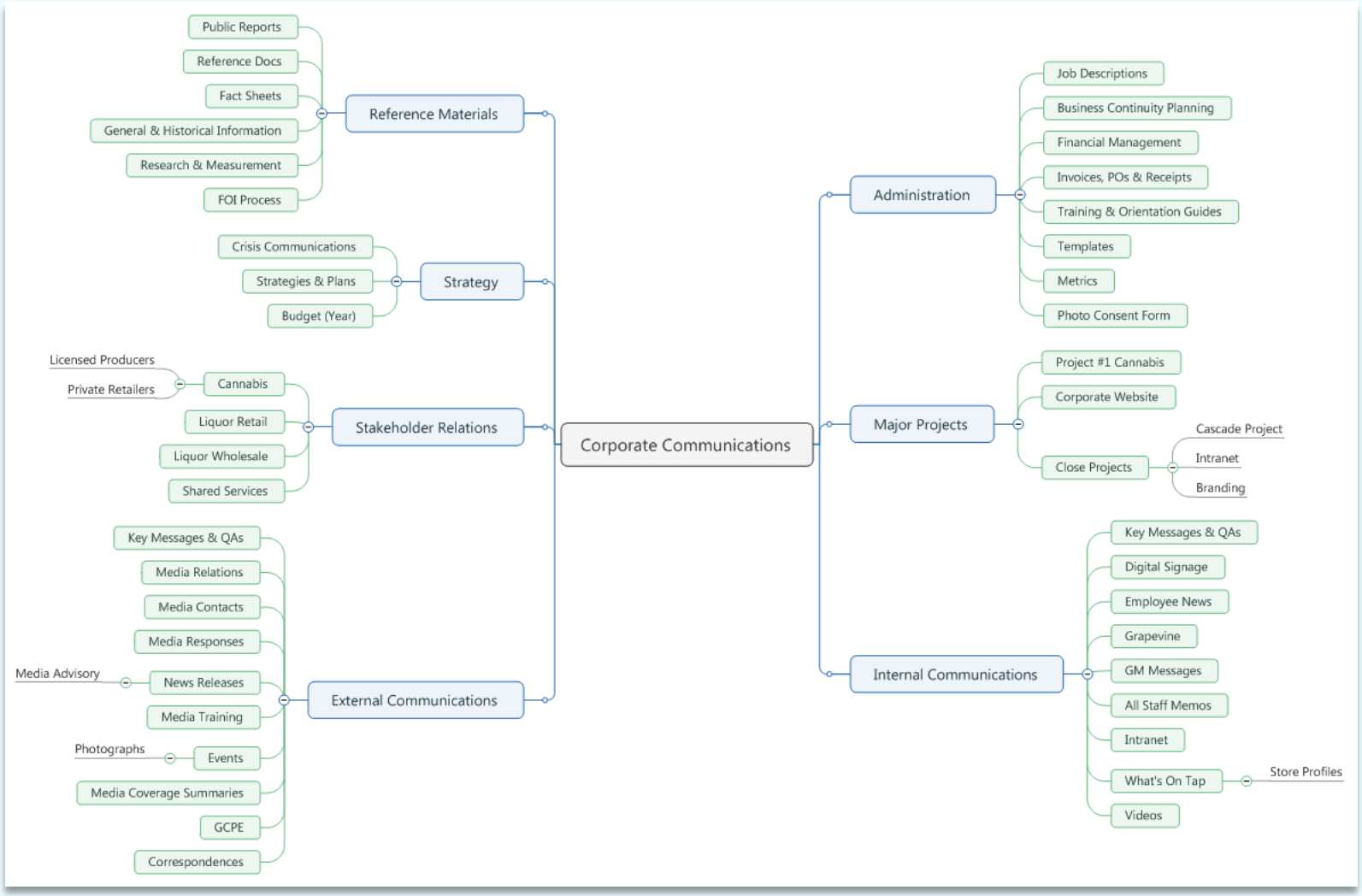
Review and Feedback – Mind Mapping

XMind





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Success Factors & Guiding Principles

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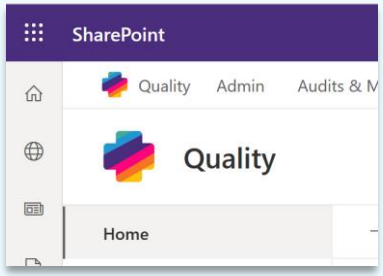
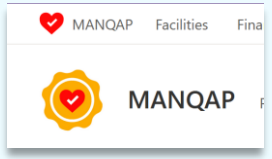
Success Factors





- **User Experience**
  - Unique branding and logos per team
  - **Aligning Teams with SharePoint** to create a cohesive, consistent experience (and reduce confusion)
- **Active Sponsorship & Job Role Development**
  - Sam and Dave were active, visible, and supportive – critical to our success
  - A new operational role was proactively created to sustain SharePoint
- **Iterative Approach**
  - Design, review, develop, review, test, review… as hands-on as possible

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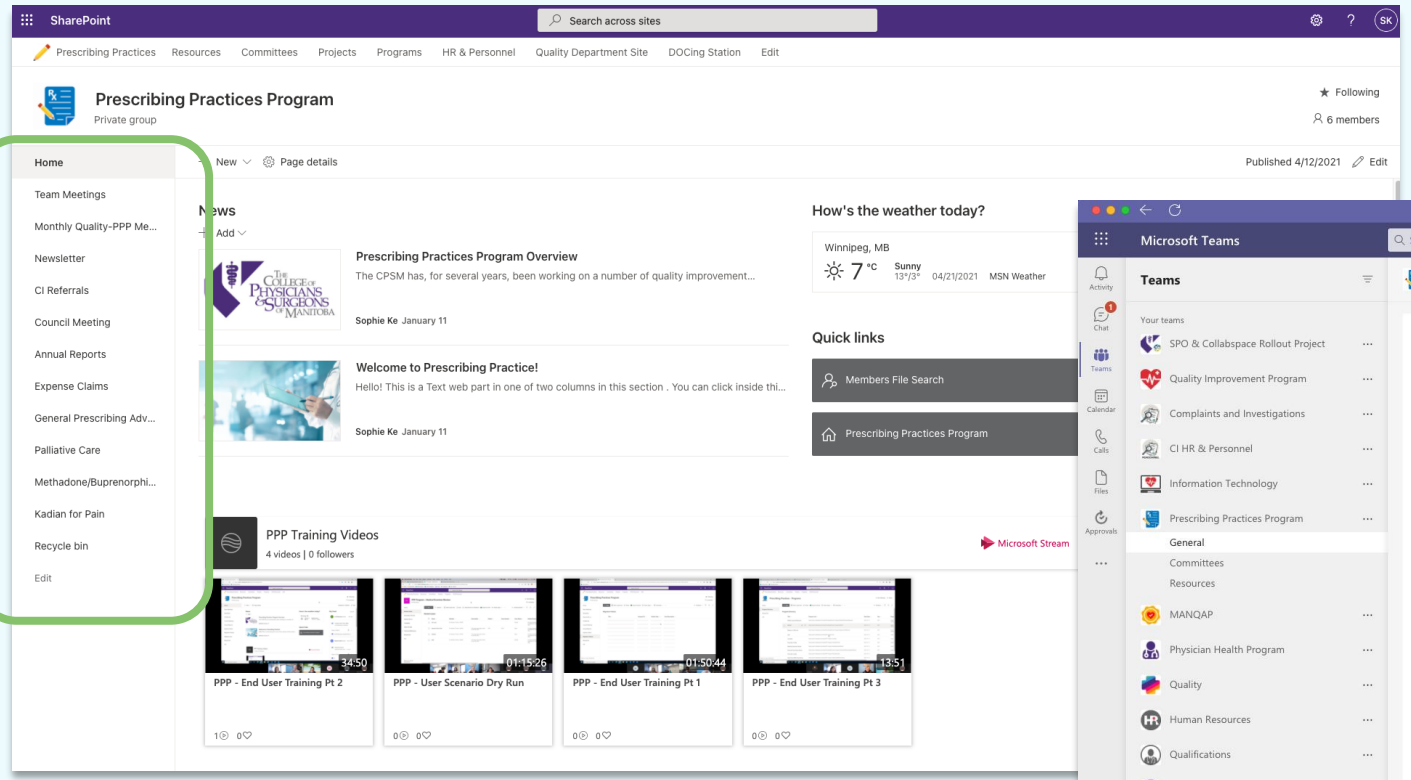
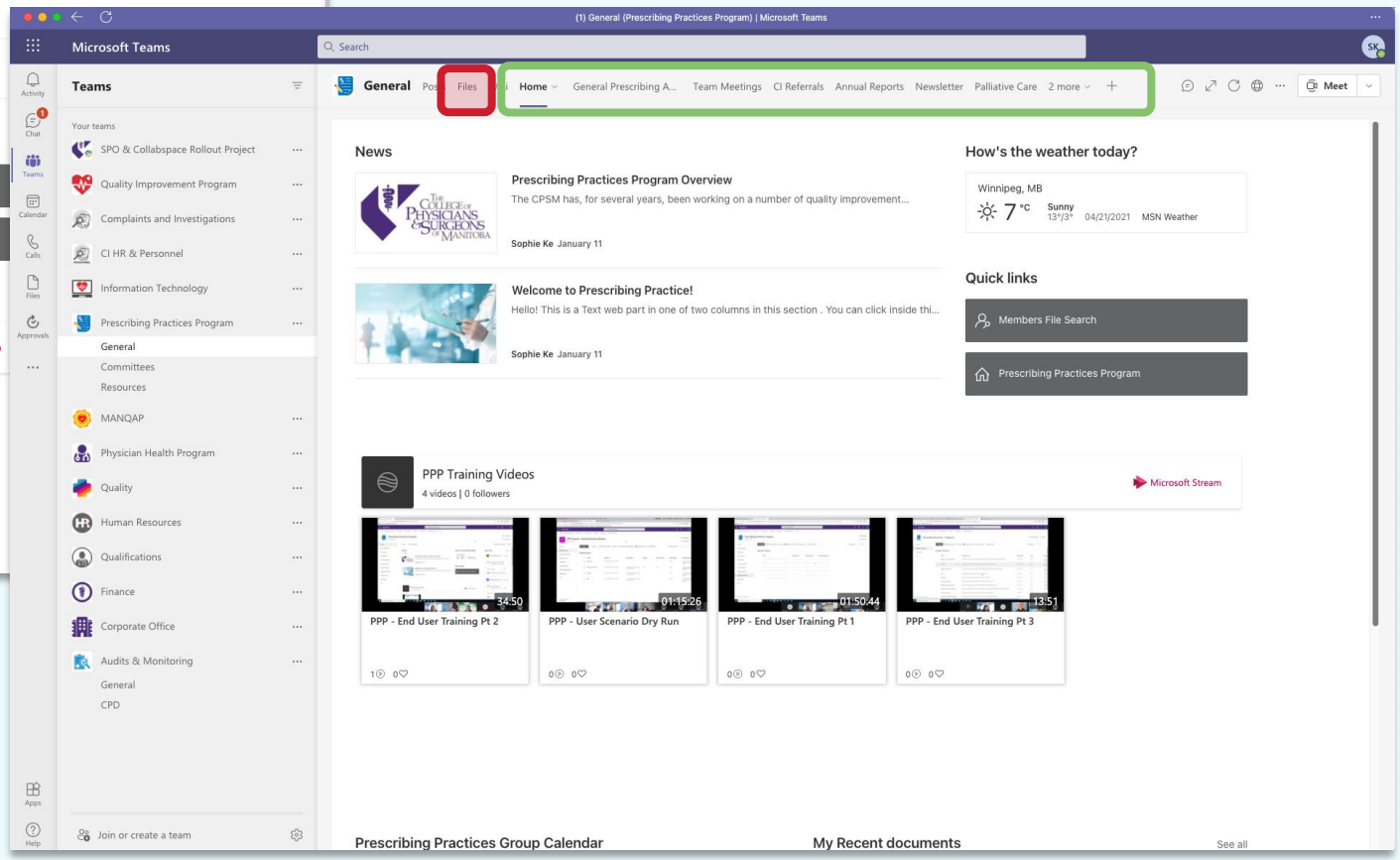
Teams = SharePoint

Teams Tabs = Site Nav Menu

Avoid using the 'Files' tab





Demo

Let's see the real deal!

SharePoint + Teams, and Planner

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Digital Transformation Principles

Digital Transformation is about more than technology – it's about enabling a **culture shift**, **changing behaviors**, and ultimately providing **business value.**
The key paradigm shifts are…

- **Closed** → **Open**
- **Doubt** → **Trust**
- **Access** → **Accessibility**
- **Hoarding** → **Sharing**
- **Reinvent** → **Reuse**
- **Silos** → **Collaboration**

This requires adhering to strong **Guiding Principles**, like…

1) **Positive user experience** (findability, reliability)
2) **Trust our employees** to do the right thing
3) **All content** created by your employees in the **Intellectual Property of the organization**

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Project Outcomes

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Project Outcomes

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What's in it for me?

Digital Transformation is an opportunity for business enablement and value creation. It's a...

- ☑ **Chance to create leaner processes**
- ☑ **Way to redefine roles and responsibilities**
- ☑ **Backbone for developing strong knowledge management**
- ☑ **Gateway to a better experience for your staff, customers and stakeholders**

The message to your stakeholders? This project is an opportunity to do bigger things, and create value for your business. Get onboard!

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Q&A

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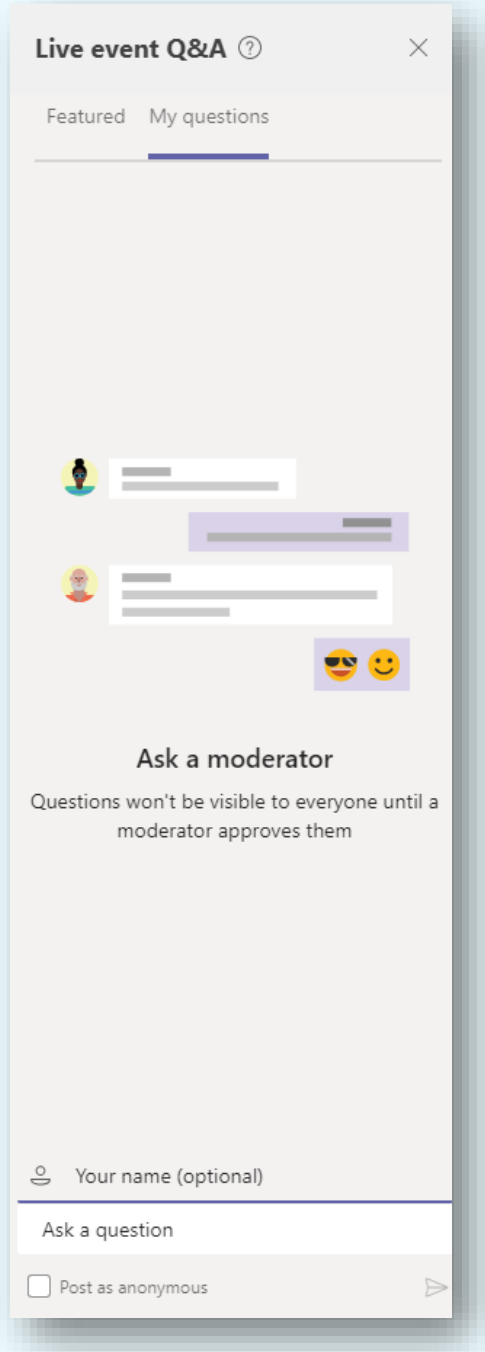
You can ask questions through the Q&A panel



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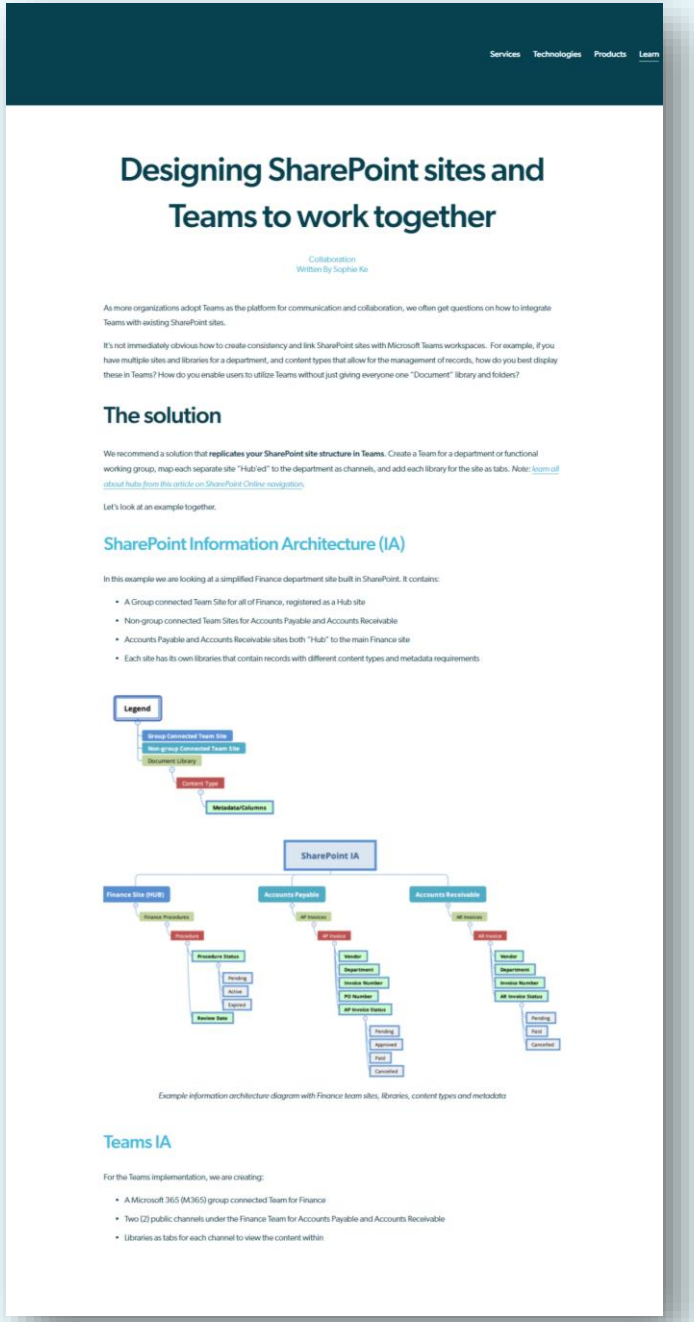
Thank you for joining!

- We will share a recording and the slides tomorrow
- Read more on the blog: go.gravityunion.com/spo-teams



Services Technologies Products Learn

Designing SharePoint sites and Teams to work together

Collaboration
Written By Sophie Ke

As more organizations adopt Teams as the platform for communication and collaboration, we often get questions on how to integrate Teams with existing SharePoint sites.

It's not immediately obvious how to create consistency and link SharePoint sites with Microsoft Teams workspaces. For example, if you have multiple sites and libraries for a department, and content types that allow for the management of records, how do you best display these in Teams? How do you enable users to utilize Teams without just giving everyone one "Document" library and folders?

The solution

We recommend a solution that **replicates your SharePoint site structure in Teams**. Create a Team for a department or functional working group, map each separate site "Hub'ed" to the department as channels, and add each library for the site as tabs. *Note: learn all about hubs from this article on SharePoint Online navigation.*

Let's look at an example together.

SharePoint Information Architecture (IA)

In this example we are looking at a simplified Finance department site built in SharePoint. It contains:

- A Group connected Team Site for all of Finance, registered as a Hub site
- Non-group connected Team Sites for Accounts Payable and Accounts Receivable
- Accounts Payable and Accounts Receivable sites both "Hub" to the main Finance site
- Each site has its own libraries that contain records with different content types and metadata requirements

Example information architecture diagram with Finance team sites, libraries, content types and metadata

Teams IA

For the Teams implementation, we are creating:

- A Microsoft 365 (M365) group connected Team for Finance
- Two (2) public channels under the Finance Team for Accounts Payable and Accounts Receivable
- Libraries as tabs for each channel to view the content within

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