



Moving to remote work on Teams and SharePoint Online

Case Study

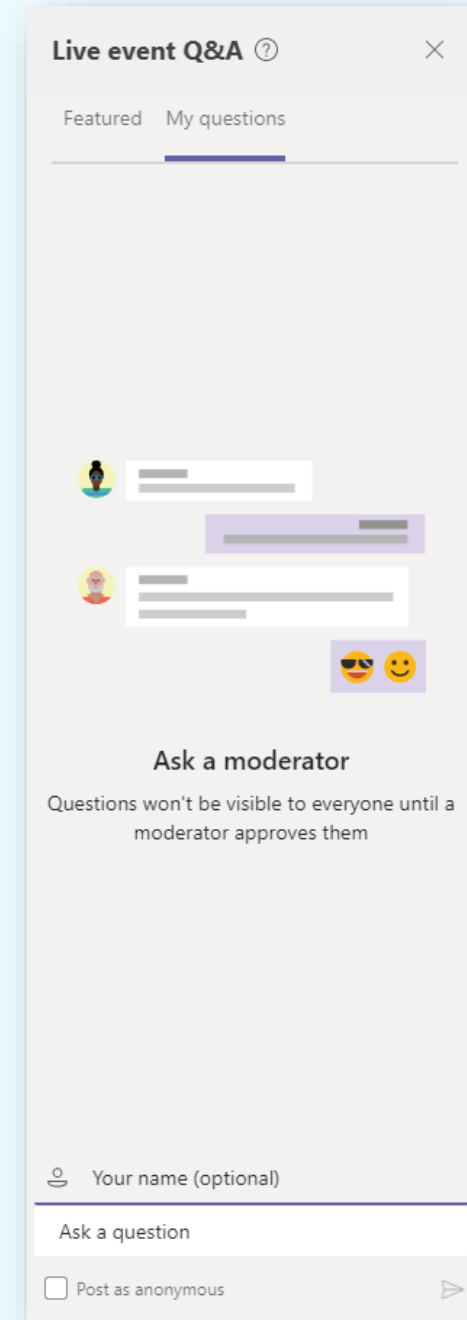
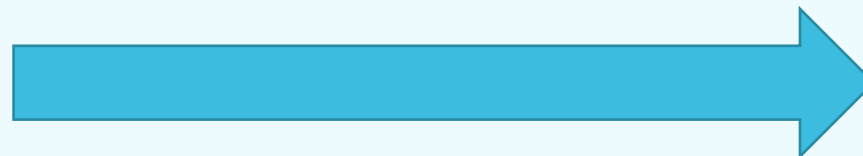
Gravity Union & the College of Physicians and Surgeons of Manitoba

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

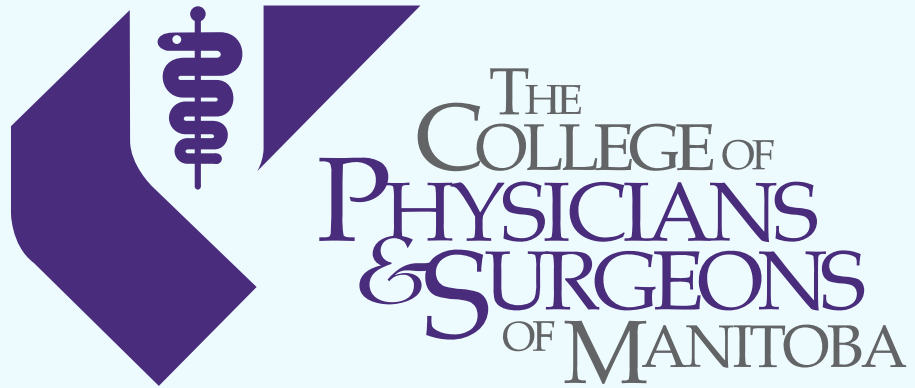


What we'll cover today

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

Introductions

Introductions



Your Speakers



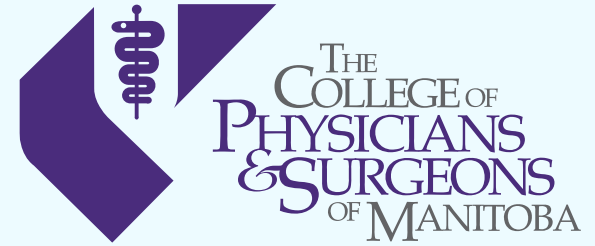
Sam Lount, Director of IT
CPSM



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



Gold Certified

Collabware Partner



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



Content Services
Partner Program
Charter Member

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

About Gravity Union



Project Background

The DOCing Station Project

Scope

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

Schedule

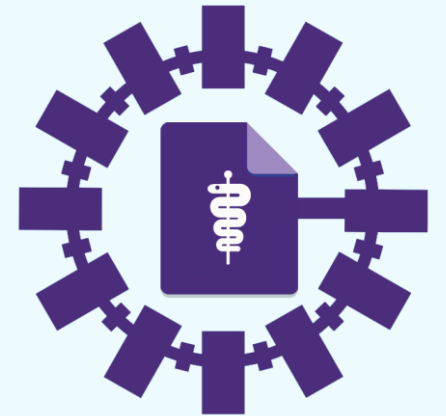
- Approx. 1 year duration
- August 2020 kickoff
- 2 months for planning
- Staggered department rollouts @ 2 months each

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



Project Approach Overview

1. Planning and preparation

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



2. Installation, strategy and training

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



3. Pilot Groups

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

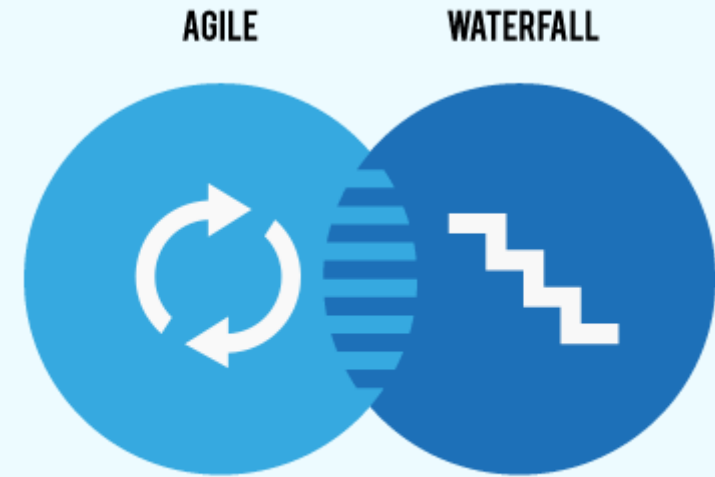


4. Organization roll-out

Getting the rest of the departments on board

GU's SharePoint Rollout Process

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



Technologies Involved

Technology Overview

Solutions delivered:

- ✓ **SharePoint Online**
- ✓ **Teams**
- ✓ **Power Platform**
- ✓ **Collabspace**



M365 Groups – Key Decision Point

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



Technology Overview

Tools leveraged:

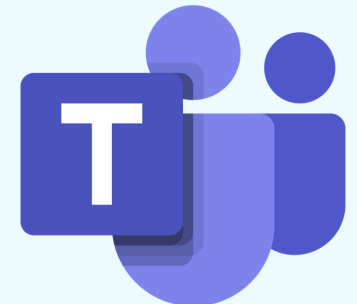
- ✓ **Planner**
- ✓ **Mural**
- ✓ **XMind**
- ✓ **SharePoint Online**
- ✓ **Teams**



Planner



XMind



Adapting Methodologies for Remote Work

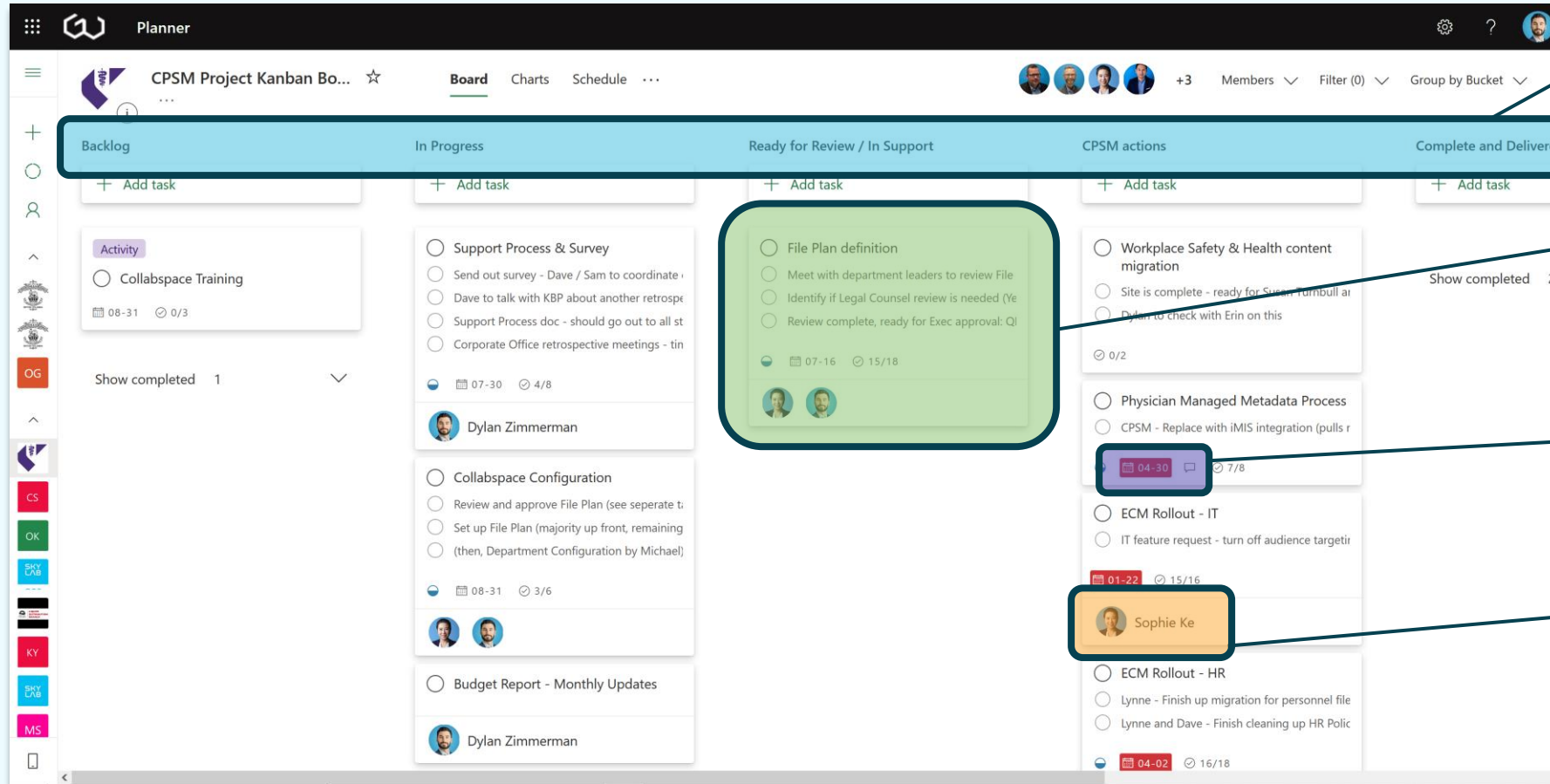
Agile Project Management Tools

Kanban Board

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



Remote Project Management with Planner



Activity Status

Task Cards

Due Dates

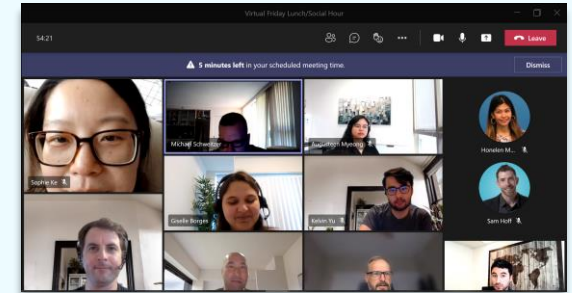
Assignments

Remote Collaboration with Teams and SPO

✓ 100% of project meetings were remote via Teams

✓ Face to face is important

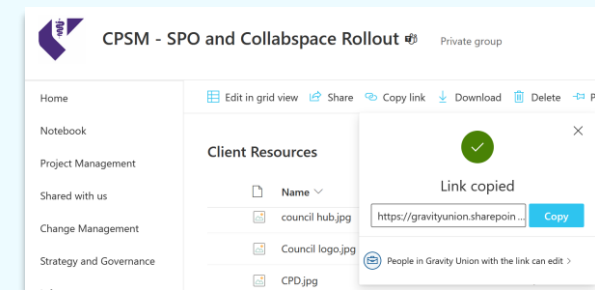
✓ Sharing screens



✓ All project documentation was stored in CPSM SharePoint

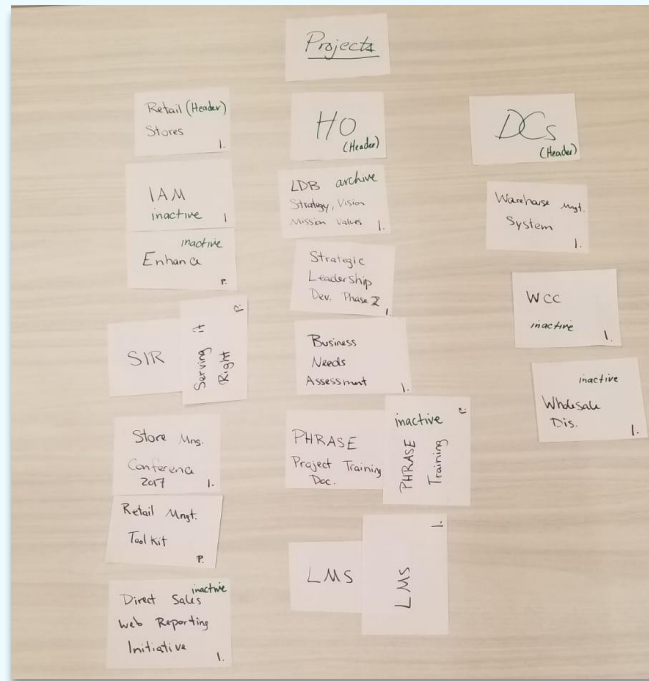
✓ Collaboration on deliverables

✓ Sharing Status and Budget Reports



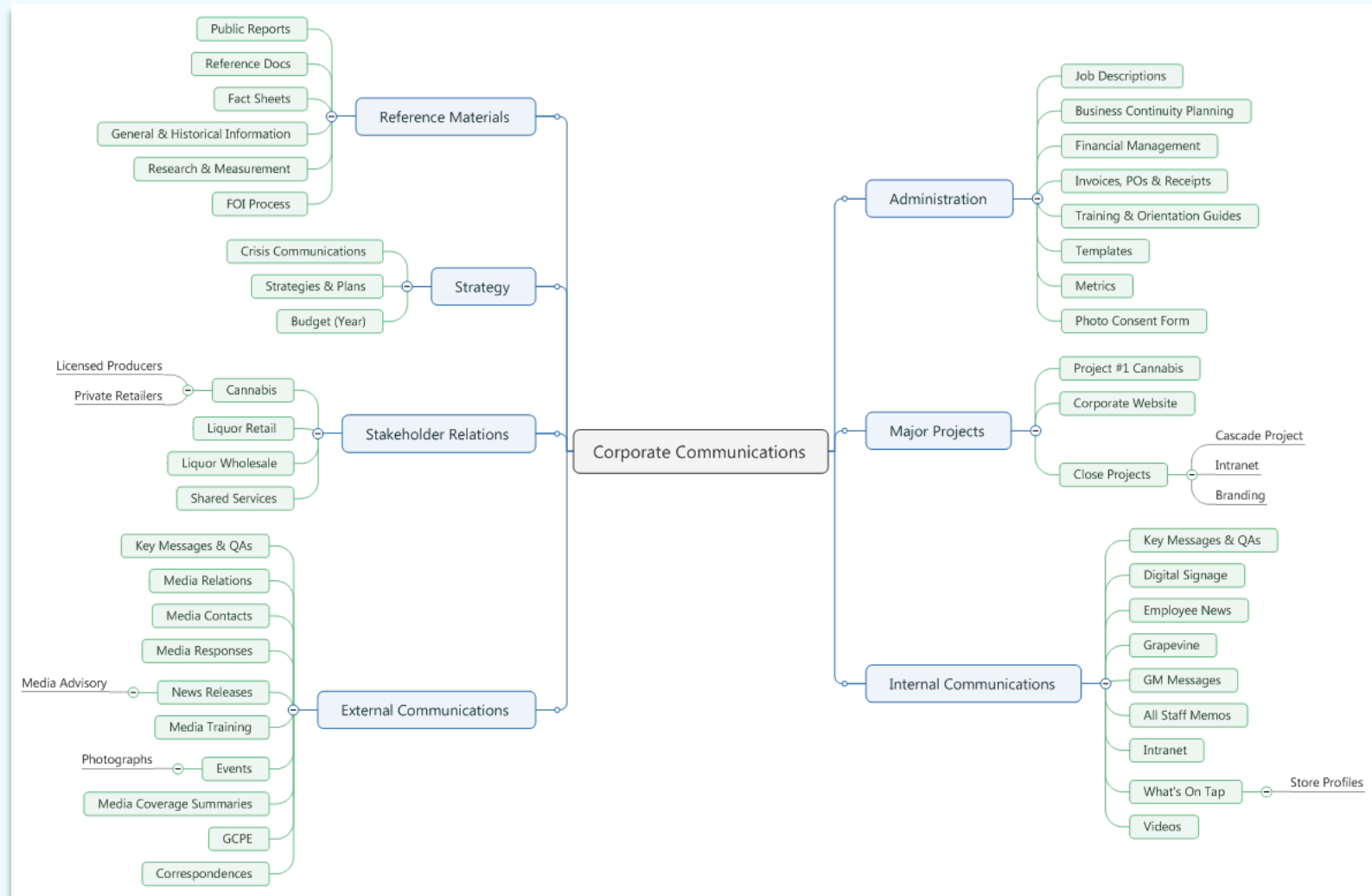
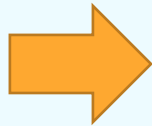
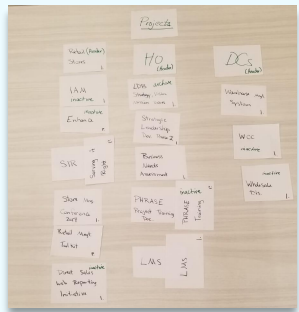
Remote Workshops with Mural

✓ Primarily used for Card Sorting & Retrospectives



What went well?	What didn't go well?	Actions to take
<h3>Step 1 - Current State/Requirements</h3> <ul style="list-style-type: none">Sophie rocks!Listening skills and transform it into the document management worldUnderstanding evolved as we went alongAn 'in moment...' lets talk about how that works in SP, understanding the tool and how to embrace itBlend of manageable learning pace and lots of info being provided to bring us along the journey	<h3>Step 1 - Current State/Requirements</h3> <ul style="list-style-type: none">Training... told that we could create new sites / libraries / areas as we went along... then had the retention conversation at the end... but that could have happened earlier, to keep the RM requirements in mind right from the start... need to apply retention to new sites, so that's good to know up frontRetention / file plan process is very important... this should involve more / all users instead of just discussed with the power usersCross-department coordination of retention period definition... defining Information Owners for specific content which is collaborated on by many group	<h3>Actions to take</h3> <ul style="list-style-type: none">Move up the retention conversation to the beginning of the process... to the extent that makes sense, and progress along the wayMake sure we inform IT if we create new areas of the siteRaise the question of information owner as we do the content discoveryOwnership of the 'duty to update' documents... information management roles in addition to content... there is a concept of an information steward... define this early on!
<h3>Step 2 - Design and Build</h3> <ul style="list-style-type: none">Great guidance, despite the overwhelming amount of informationCard sorting worked well, helped to understand the group's content on aggregateCard sort facilitated content building within the team... end time was booked outside the GU meetings to discuss which was valuable... valuable takeaways that we could amend ourselves of down the roadMindmapping was a good transition step... helped build the vision that this is where the card sort was heading, building excitement for SPRecording the training sessions was critical so we could revisit it laterMoving to prototype review was a bit of a jump, but not necessarily avoidable, just part of the processGetting hands on is important	<h3>Step 2 - Design and Build</h3> <ul style="list-style-type: none">Department needed more time on their own to sort through content and organize and clean things up... lots of different repositories to review and think aboutMore 'baggage' requires more time to go through the process and sort things out... preparing for migration... some things are outstanding and once the pressure is off things might not get done laterHistorical information wound up in SP which may not be required in the future... more time would be valuableIntense phase of work, but the pressure is good to keep things going... but more time in between sessions would be better... it did help some other regular business activities	<h3>Actions to take</h3> <ul style="list-style-type: none">Add in takeaway action items / time into the process... instead of having it all focused on sessions that the project team facilitates... need at least one more step in the process to take it away and think about it... this helps migration prep as well... maybe 1-2 weeks around the mind map phase as takeaway time
<h3>Step 3 - Testing / Dry Run</h3> <ul style="list-style-type: none">All wentRepetition was helpful as a training tactic, need to walk	<h3>Step 3 - Testing / Dry Run</h3> <ul style="list-style-type: none">It was hard to retain all the information that was part of the training and	

Review and Feedback – Mind Mapping



Success Factors & Guiding Principles

Success Factors

✓ User Experience

✓ Unique branding and logos per team

✓ Aligning Teams with SharePoint to create a cohesive, consistent experience
(and reduce confusion)

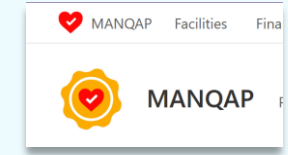
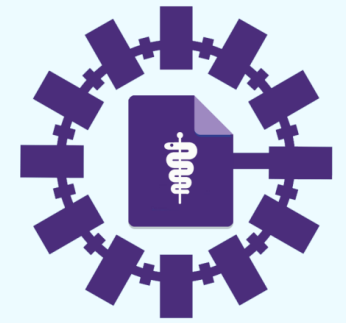
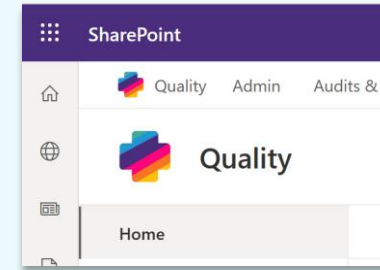
✓ Active Sponsorship & Job Role Development

✓ Sam and Dave were active, visible, and supportive – critical to our success

✓ A new operational role was proactively created to sustain SharePoint

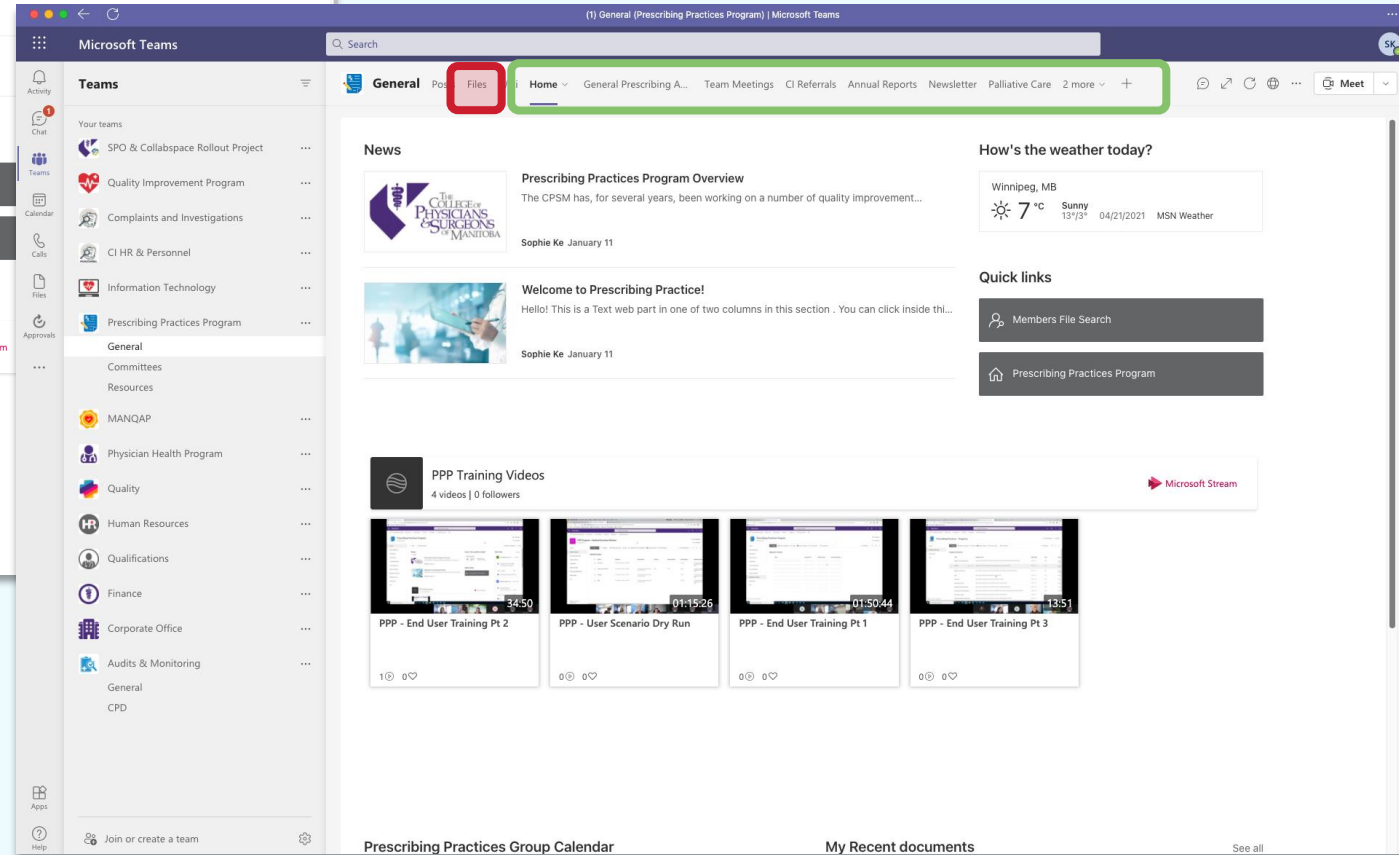
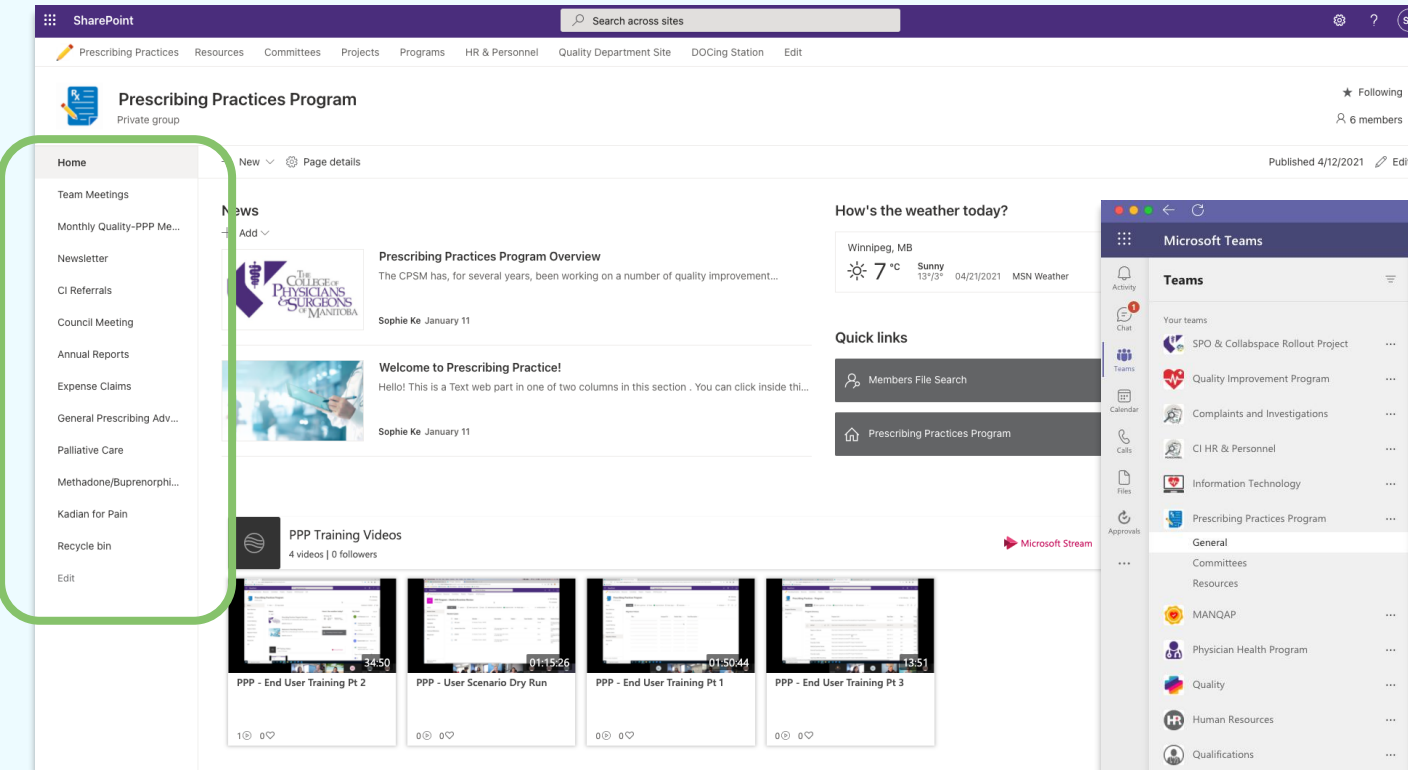
✓ Iterative Approach

✓ Design, review, develop, review, test, review... as hands-on as possible



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**

Project Outcomes

Project Outcomes



What's in it for me?

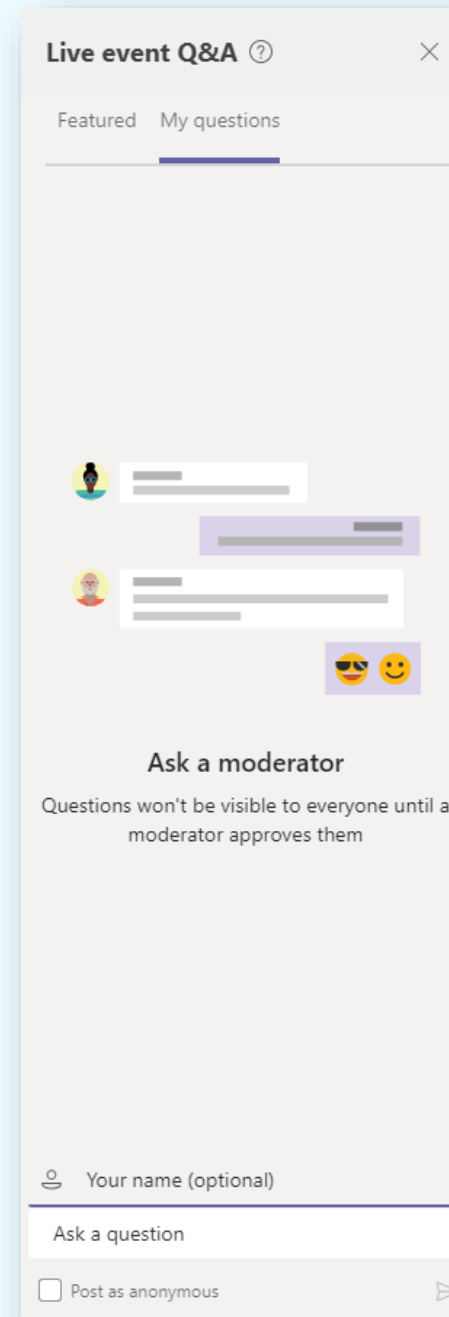
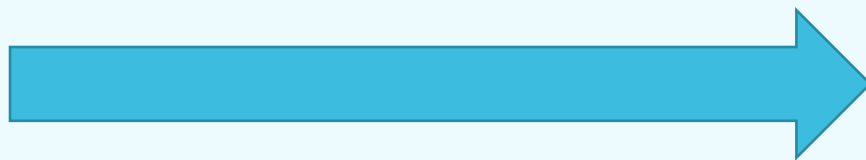
Digital Transformation is an opportunity for business enablement and value creation. It's a...

- ✓ 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!**

Q&A

You can ask questions through the Q&A panel



Thank you for joining!

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

Designing SharePoint sites and Teams to work together

Collaboration
Written By Sophie Ku

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

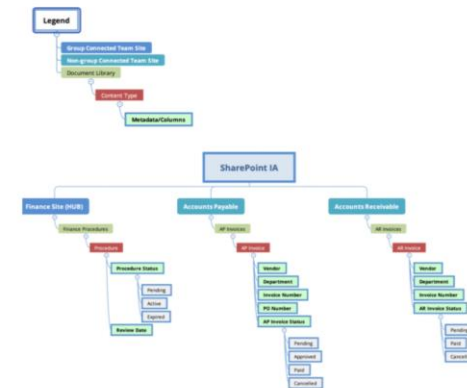
We recommend a solution that replicates your SharePoint site structure in Teams. Create a Team for a department or functional working group, map each separate site "Hub" to the department as channels, and add each library for the site as tabs. Note: [learn all about hubs from this article on SharePoint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