



Lean and Agile Microsoft 365 projects

A Gravity Union Webinar

Housekeeping

1. Use the Q&A panel to ask questions or share comments
2. The video **recording** and **slides** will be shared after the webinar

What we'll cover today

- ✓ Understanding Software Development Risks
- ✓ Agile concepts
- ✓ Lean concepts
- ✓ How we apply lean and Agile principles to our M365 projects

Introductions

Nice to meet you!



Jas Shukla

Director of Strategy

- ✓ 15 years experience in enterprise technology consulting
- ✓ Previously with Microsoft on the SharePoint product team
- ✓ UX designer in a previous life



Michael Schweitzer

President and CEO

- ✓ 14 + years of SharePoint and M365 Records Management project experience
- ✓ Microsoft and Collabware certified
- ✓ Collabware MVP recipient
- ✓ Vancouver Office 365 user group board member
- ✓ ARMA Canada guest speaker
- ✓ SharePoint Saturdays guest speaker
- ✓ Over 100 SharePoint ECM projects completed

About Gravity Union

Nice to meet you!

Who we are

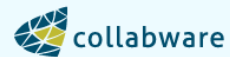
A boutique Canadian compliance-inspired services firm helping organizations in their digital transformation journey

Microsoft
Partner

Gold Cloud Productivity
Gold Collaboration and Content
Gold Project and Portfolio Management

Gold Certified

Collabware Partner



We're a certified as a Great Place to Work!



Experience Overview

60+

Years of combined
Collabware
experience

50,000+

Users using our
SharePoint and
M365 solutions

40+

Microsoft
certifications

30+

Collabware and
Collabspace projects

10+

Years of average
SharePoint
experience across
our team

18

Collabware certified
consultants

100+

Million documents
migrated and
managed in our
solutions

100%

Project success rate

Understanding Software Development Risk

The year was 2009.....

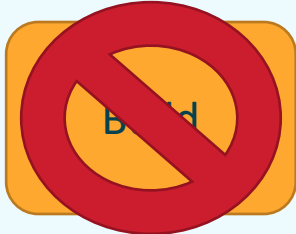
Software Development Risk

Custom Software development is expensive

- ✓ High salaries
- ✓ Can take a long time to develop
- ✓ Functional requirements and Solution Complexity
- ✓ Platform/Browser/Mobile Support
- ✓ Language support
- ✓ Security, Scalability, Performance



It's really expensive to do it twice



\$



\$

Hedging Software Development Risk

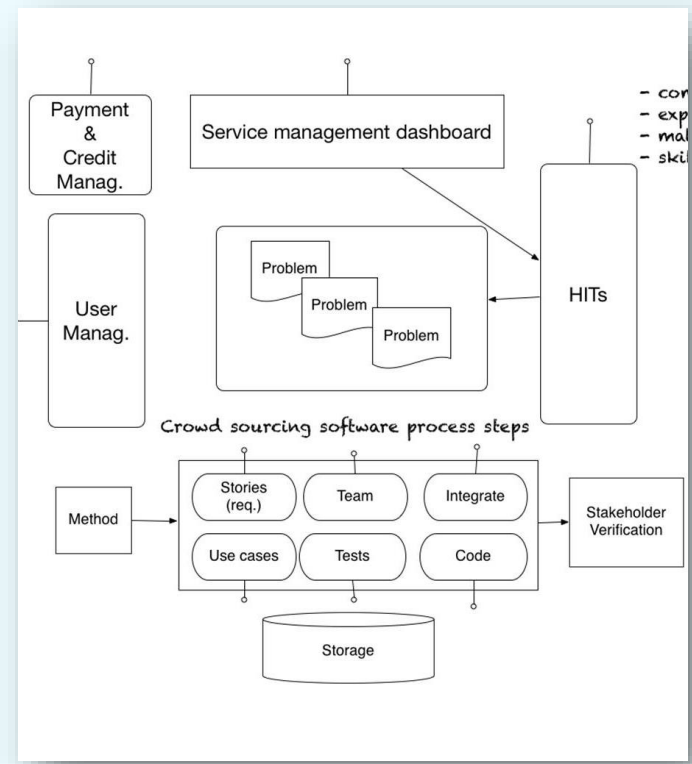
- ✓ Make sure the software developer has clear and well understood requirements
- ✓ That is to say... we don't want them spending time guessing on what needs to be built or making assumptions about how the software should behave

Hedging Software Development Risk

4

5

Requirements and Analysis



Solution Architecture

USERSCOPE 2.0 sketch v1

BRIEF DESCRIPTION

HOW FEEL IS SUBMITTED ON INSIDE

CONSIDER CHOOSE

LARGE SCREEN HLT

WHY ROTATE

BETWEEN HELPSPOT & NEW APP?

1/25 HELPSPOT

1/25 NEW APP

SUB-WAY FEEL ONLY INTERIOR PBS

CAN TO ACTION FOR HELPSPOT (MAYBE NOT SO BOLD?)

HELPSPOT TESTIMONIALS

CAN TO ACTION APP 2 1/3 rd

TESTIMONIAL APP 2

FORWARD HOBIN

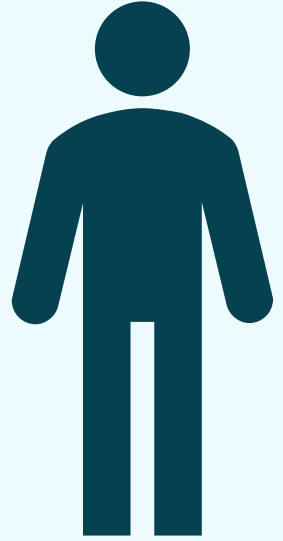
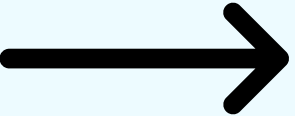
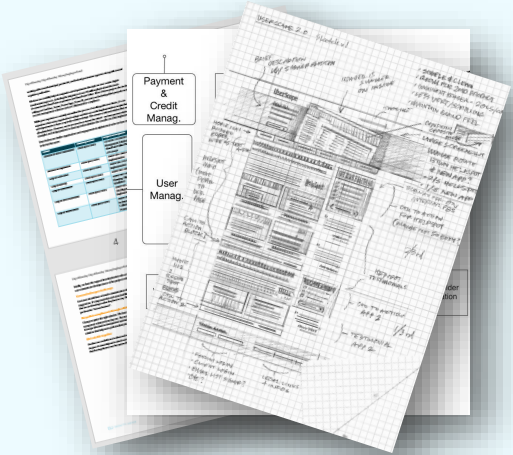
E-MAIL LIST SIGNUP?

CHECK?

LEAVE LINKS + INFOS

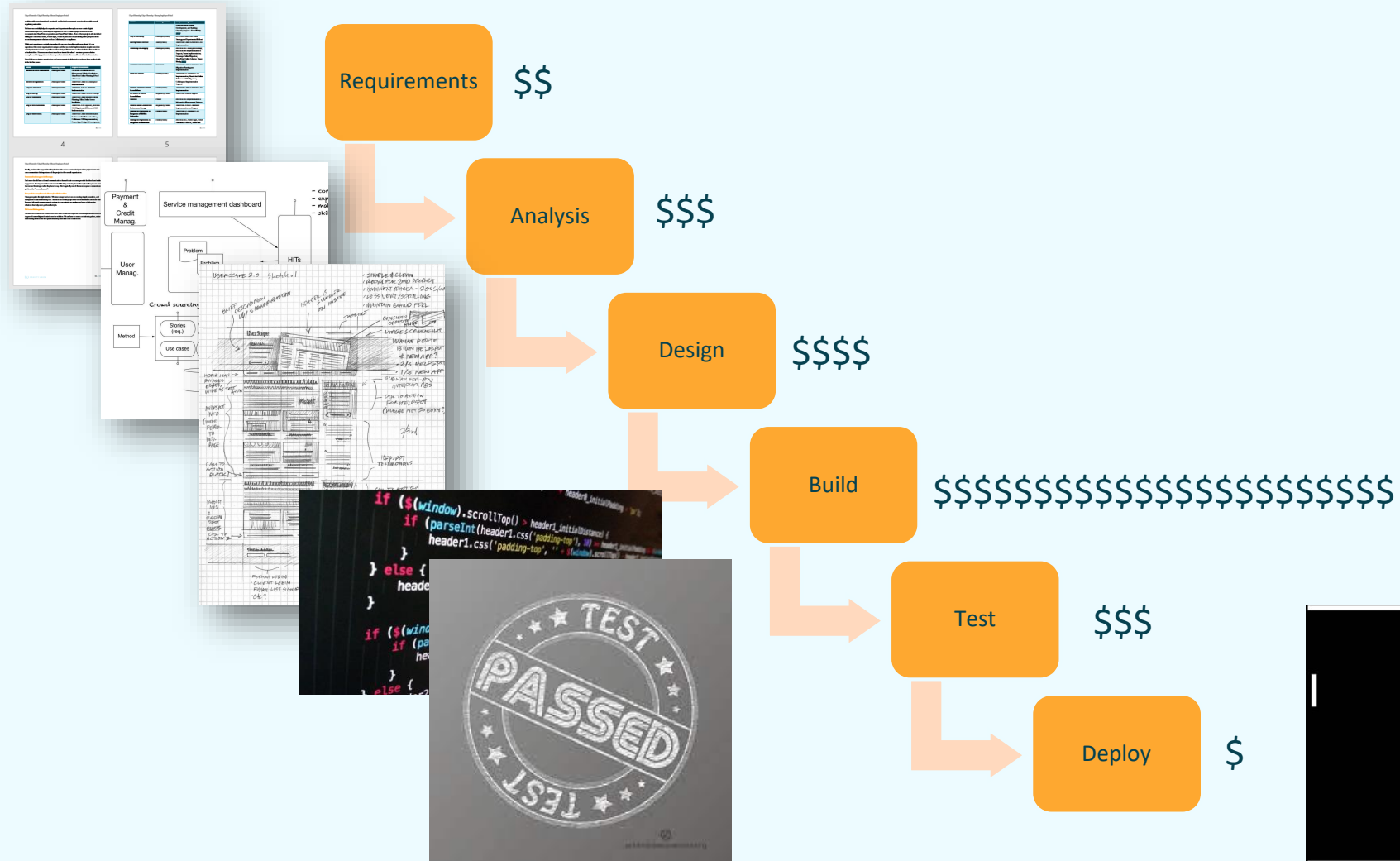
Design

Hedging Software Development Risk



Developer

The waterfall method



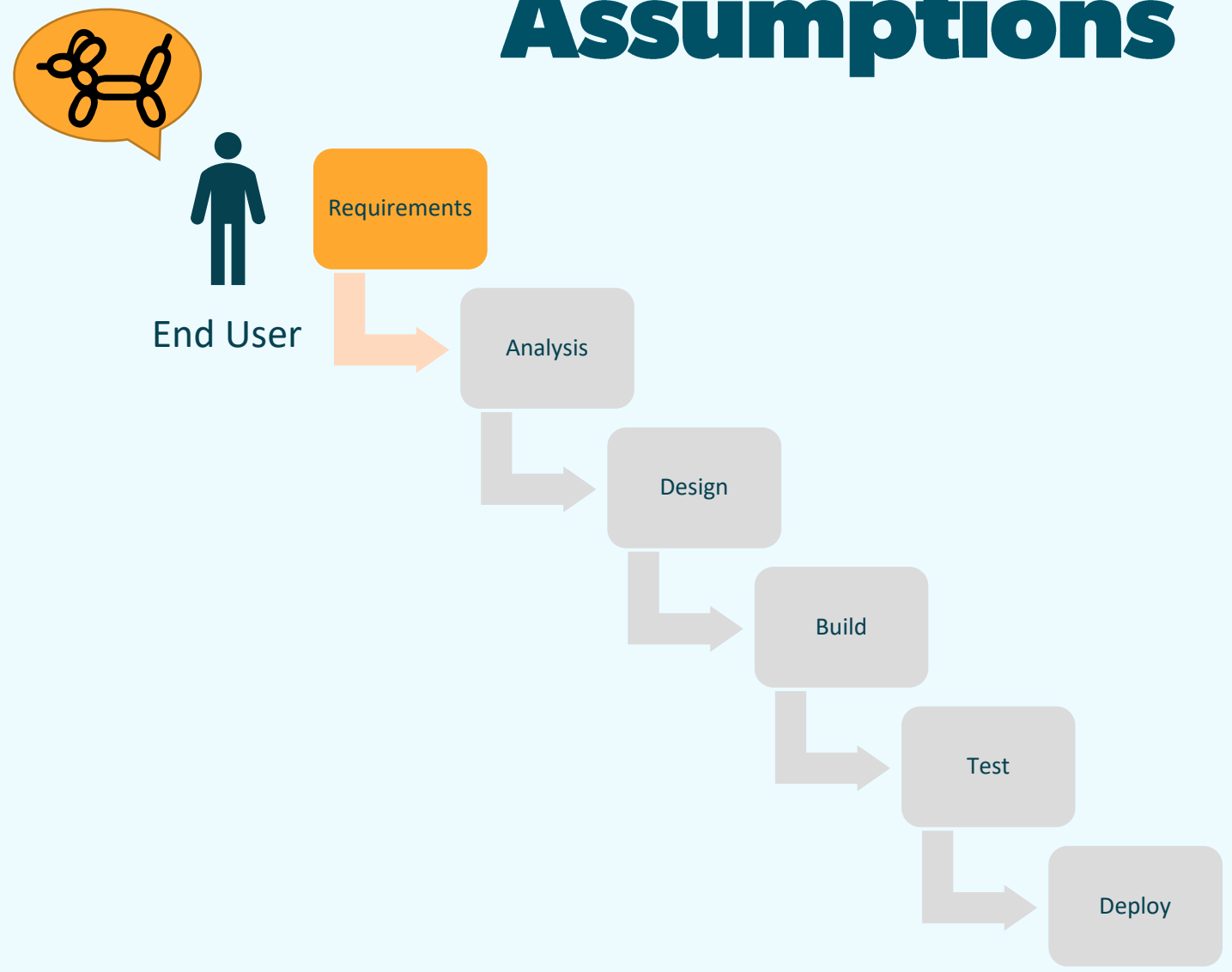
Problems with the waterfall method

We have issues

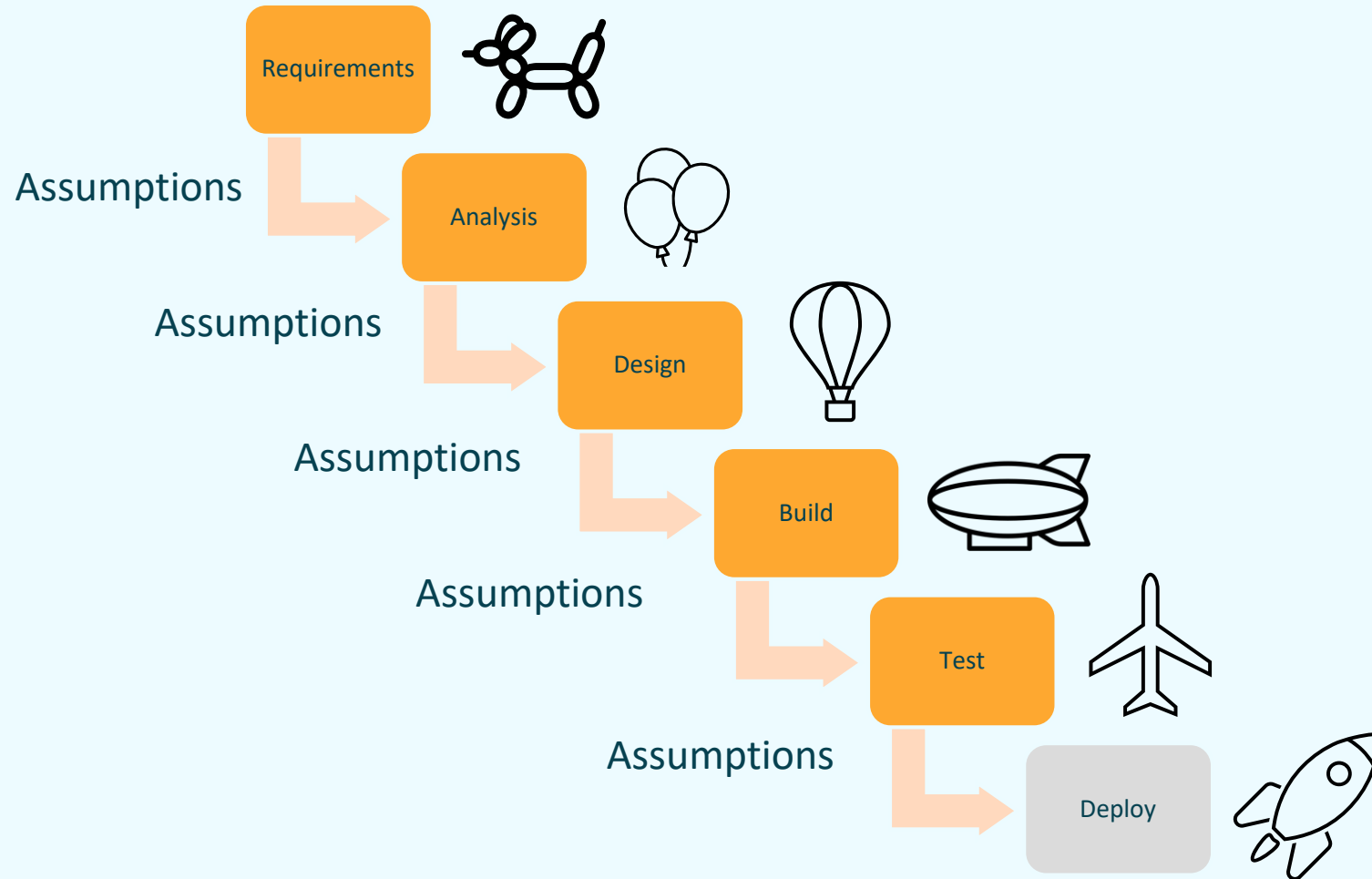
Don't go chasing waterfalls

- 1. Assumptions on assumptions on assumptions (lack of customer input throughout process)**
- 2. Rigid process (can't go backwards)**
- 3. Big hand over from stage to stage tended to slow things down**

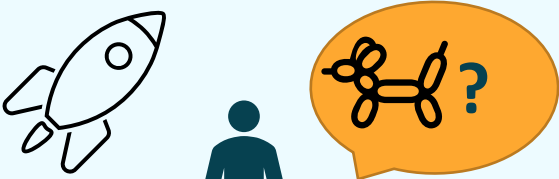
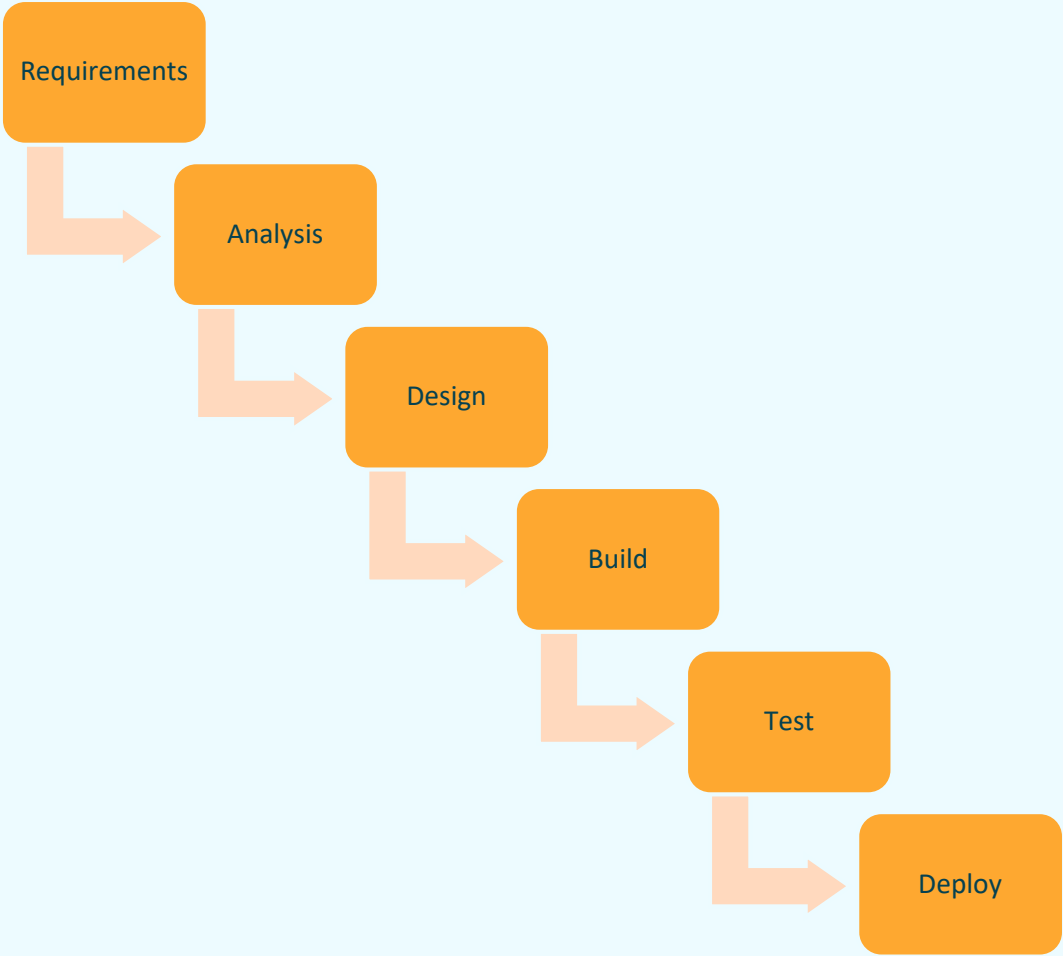
Assumptions



Assumptions

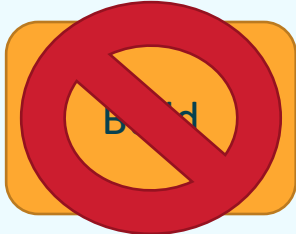


Assumptions



End User

Back to the drawing board



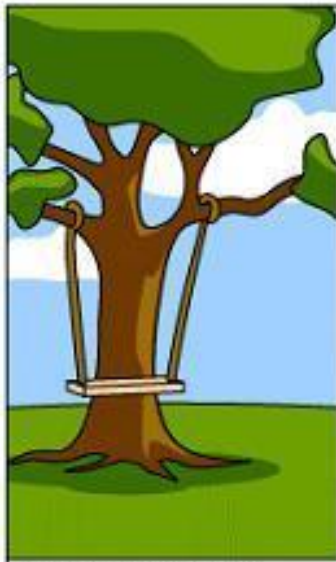
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How the customer explained it



How the Project Leader understood it



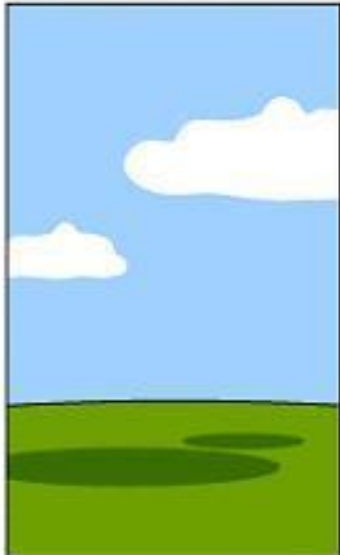
How the Analyst designed it



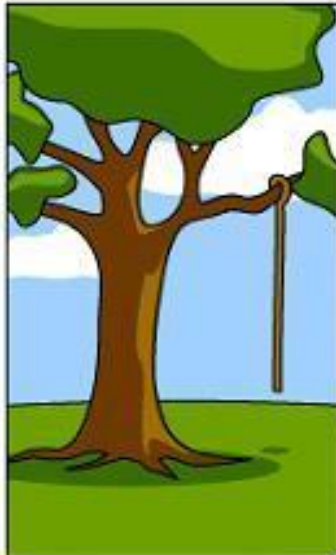
How the Programmer wrote it



How the Business Consultant described it



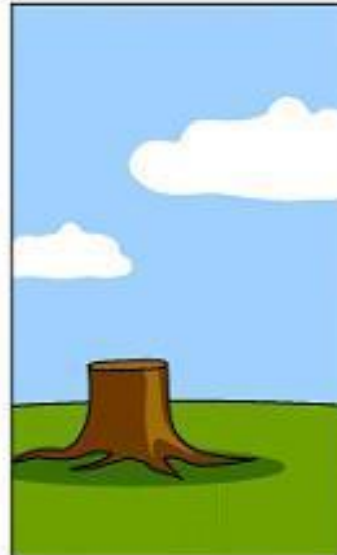
How the project was documented



What operations installed



How the customer was billed



How it was supported



What the customer really needed

Canada

Gun registry cost soars to \$2 billion



CBC News · Posted: Feb 13, 2004 11:02 PM ET | Last Updated: February 13, 2004

Canada's controversial gun registry is costing taxpayers far more than previously reported, CBC News has learned.

Nearly \$2 billion has either been spent on or committed to the federal program since it was introduced in the mid-1990s, according to documents obtained by *Zone Libre* of CBC's French news service.

The figure is roughly twice as much as an official government estimate that caused an uproar across the country.

The gun registry was originally supposed to cost less than \$2 million. In December 2002, Auditor General Sheila Fraser revealed that the program would run up bills of at least \$1 billion by 2005.

But the calculations remained incomplete, so CBC News obtained documents through the Access to Information Act and crunched the numbers.

A large part of the \$2 billion expense is a computer system that's supposed to track registered guns, according to one document. Officials initially estimated it would cost about \$1 million.

Ottawa

Phoenix cost soars by another \$137M, paid to IBM



Total value of contract increased from **\$5.7M** to more than \$393M within 8 years

CBC News · Posted: May 15, 2019 4:00 AM ET | Last Updated: May 15, 2019



Ottawa

Phoenix pay system cost could total **\$2.6B** before cheaper replacement ready



Federal government watchdog estimates new system won't be ready until 2023

CBC News · Posted: May 16, 2019 10:18 AM ET | Last Updated: May 17, 2019

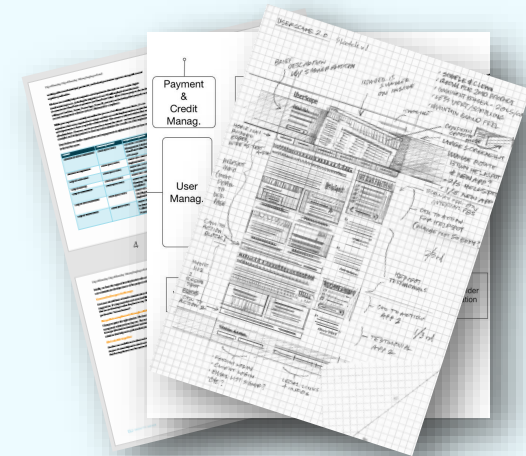


How did we address these issues?

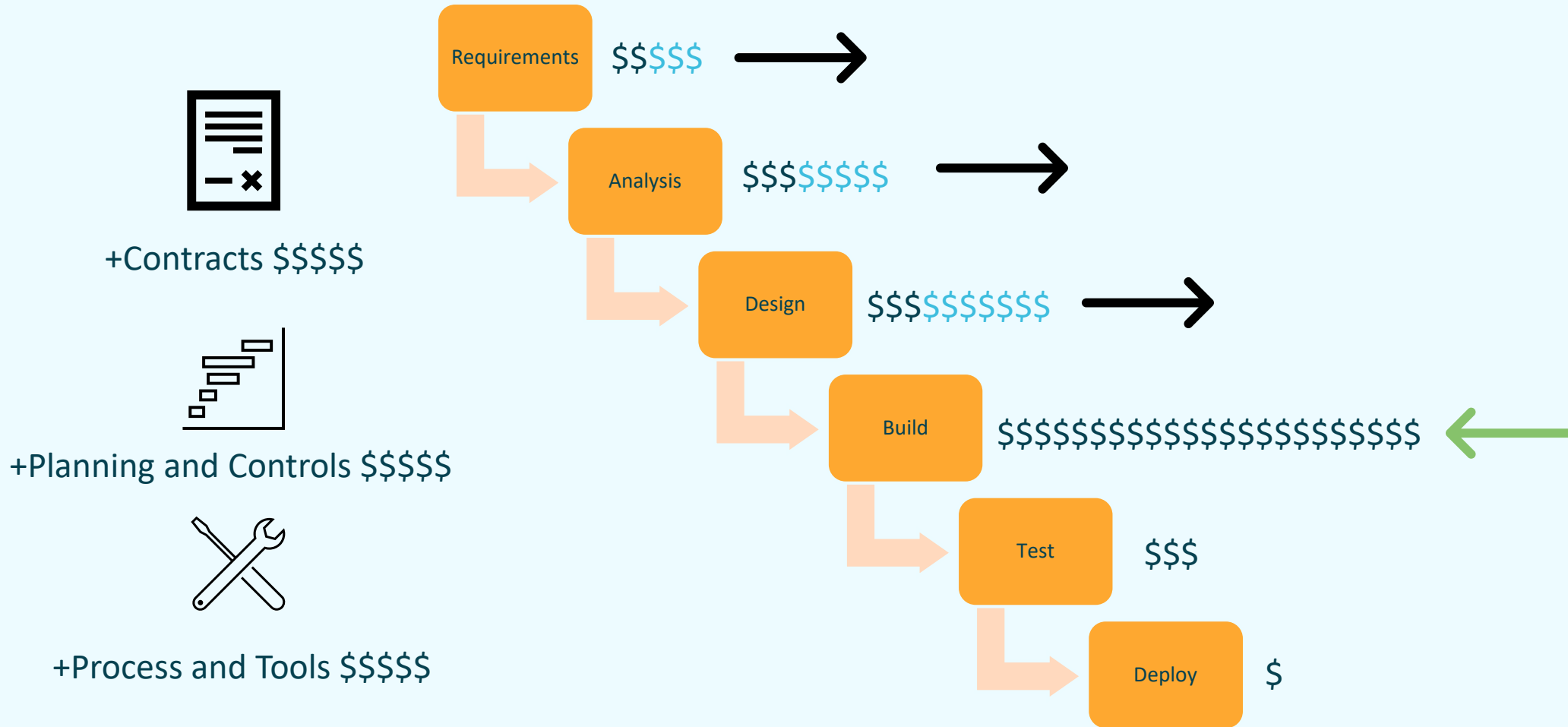
Governance

Initially we increased governance

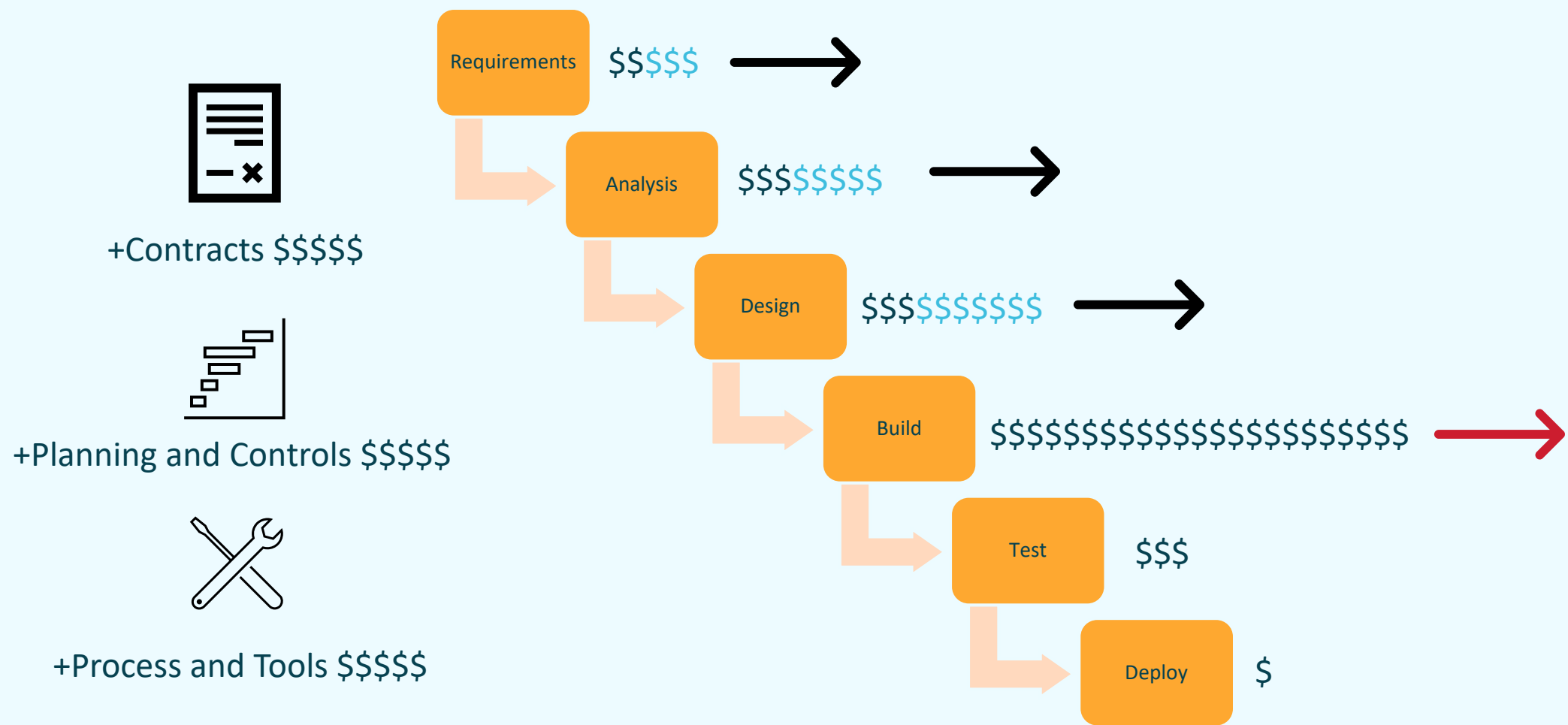
- ✓ More documentation (requirements analysis and design)
- ✓ More processes and tools to manage the processes
- ✓ Tighter controls, stricter plans
- ✓ Increasingly complex contracts



What we were hoping for...



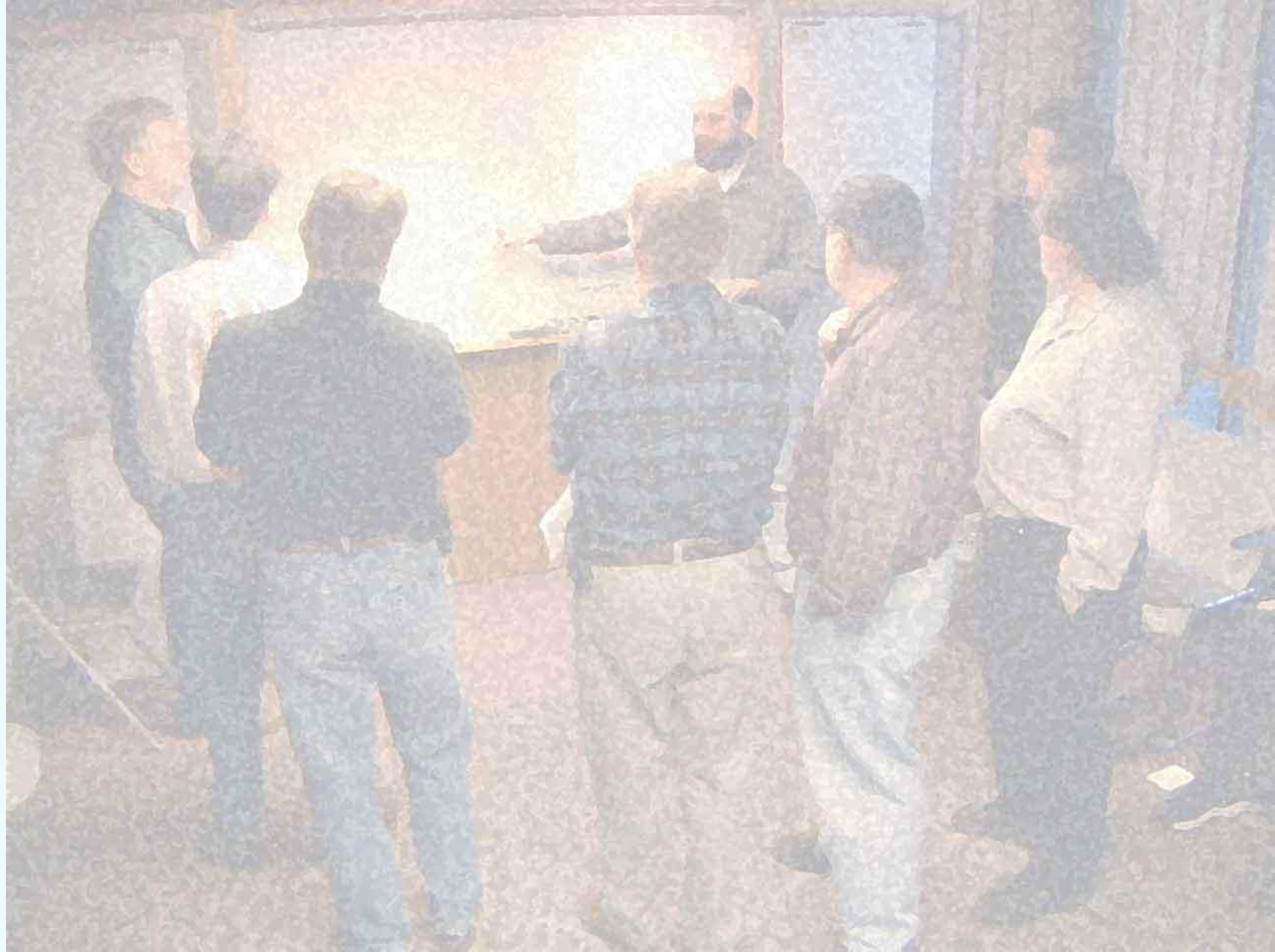
What we got...



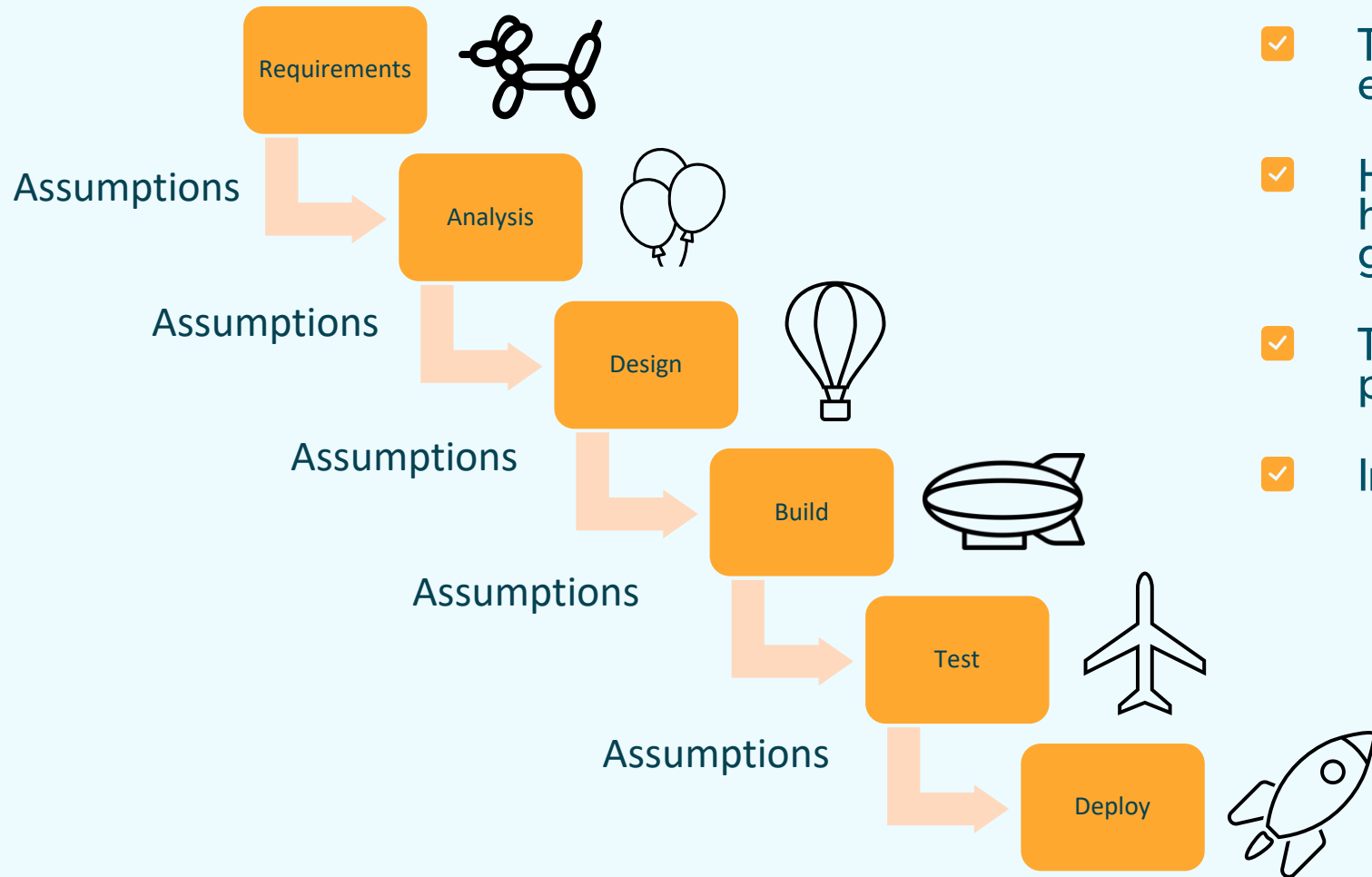


Agile Concepts





Root problems



- ✓ Too many Assumptions due to the lack of end user engagement
- ✓ High overhead and miscommunication handing off between stages (telephone game)
- ✓ Too much process and ceremony (effort placed into non intrinsic valued activities)
- ✓ Inflexible process and tools



We are uncovering better ways of developing software by doing it and helping others do it. Through this work we have come to value:

- Individuals and interactions** over processes and tools
- Working software** over comprehensive documentation
- Customer collaboration** over contract negotiation
- Responding to change** over following a plan

That is, while there is value in the items on the right, we value the items on the left more.

- | | | |
|-------------------|----------------|------------------|
| Kent Beck | James Grenning | Robert C. Martin |
| Mike Beedle | Jim Highsmith | Steve Mellor |
| Arie van Bennekum | Andrew Hunt | Ken Schwaber |
| Alistair Cockburn | Ron Jeffries | Jeff Sutherland |
| Ward Cunningham | Jon Kern | Dave Thomas |
| Martin Fowler | Brian Marick | |

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[Twelve Principles of Agile Software](#)

[View Signatories](#)

[About the Authors](#)
[About the Manifesto](#)

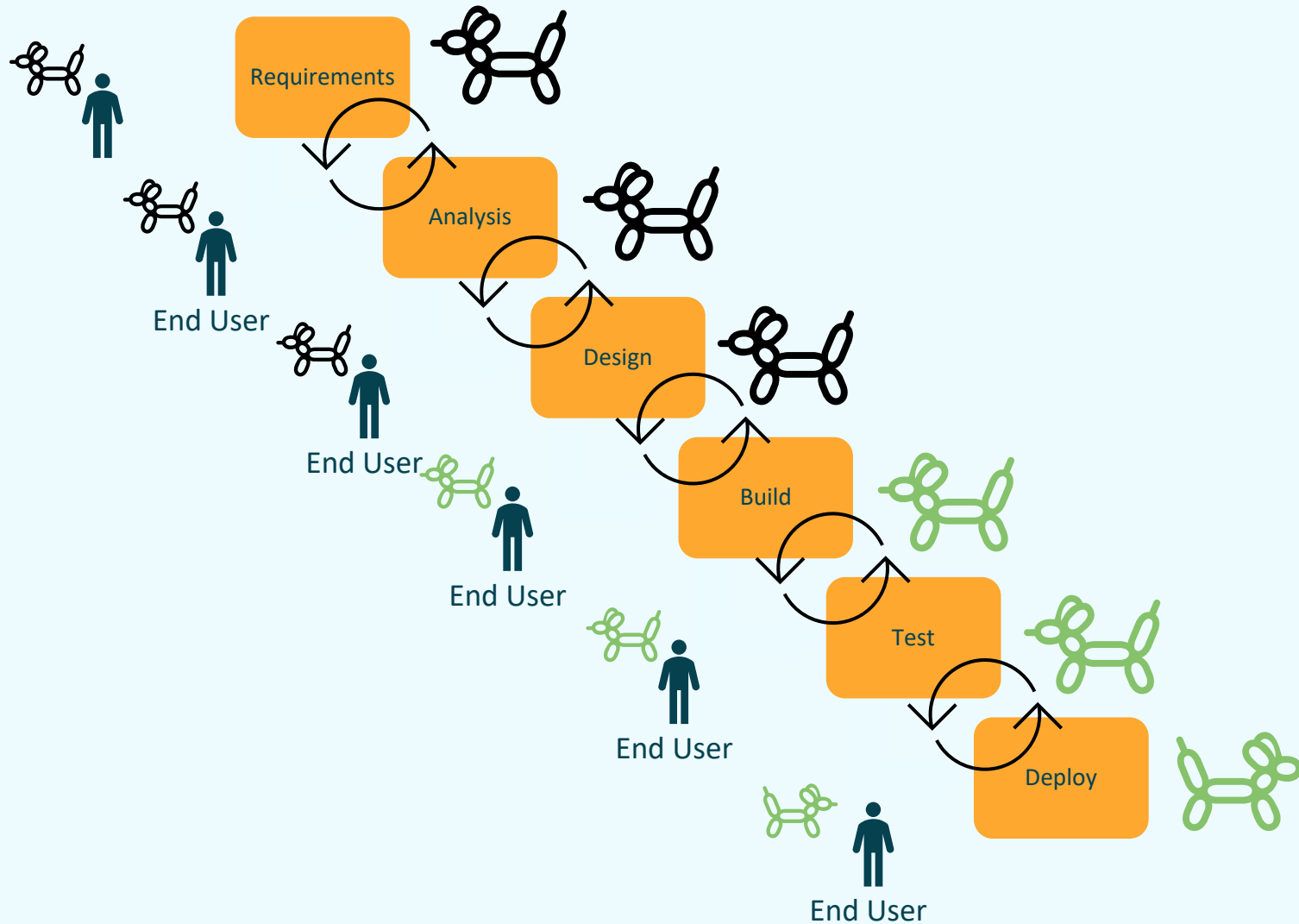
Agile Manifesto

- ✓ Individuals and interactions over processes and tools
- ✓ Working software over comprehensive documentation
- ✓ Customer collaboration over contract negotiation
- ✓ Respond to change over following a plan

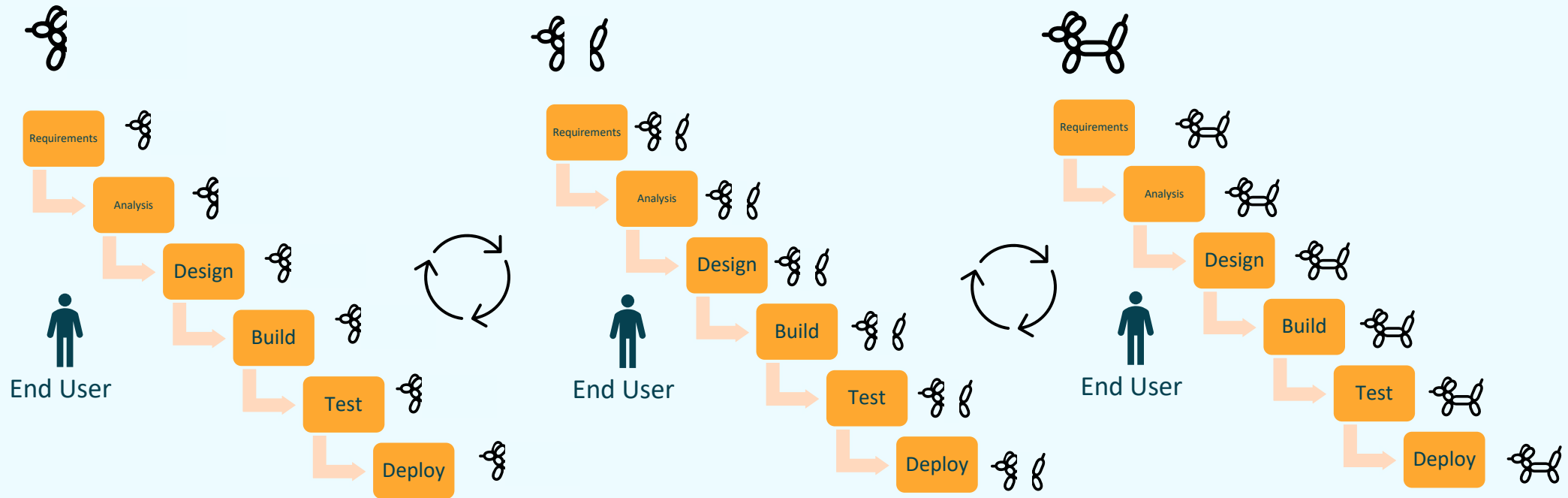
Individuals and Interactions

- ✓ Daily stand ups
- ✓ Co-location (pre pandemic) – Teams channels now?
- ✓ Inclusiveness
- ✓ Clients are attending meetings

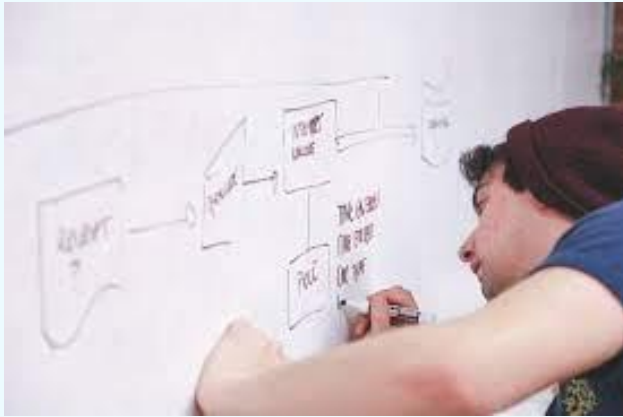
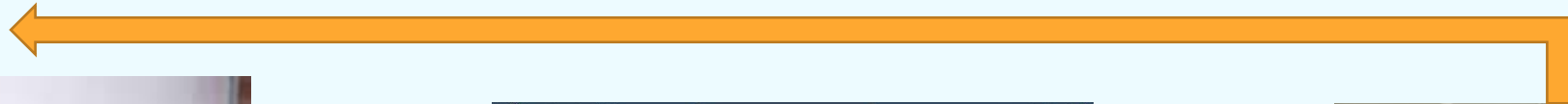
Customer Collaboration



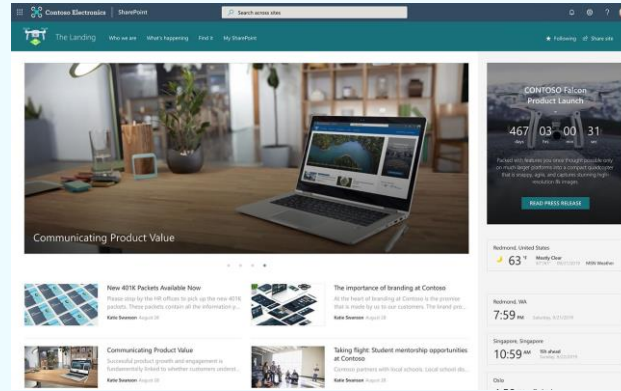
Responding to change



Working Software



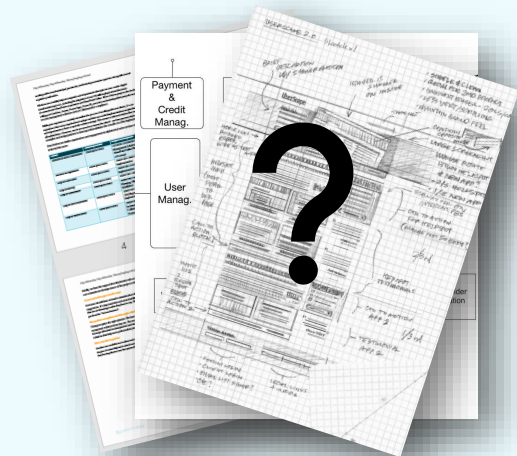
requirements



prototype



Demo



Lean Concepts

In solution development



GRAVITY
UNION



Lean is a set of management practices to improve efficiency and effectiveness by eliminating waste.

Lean

- ✓ Eliminate waste
- ✓ Build quality into the process
- ✓ Create and share knowledge
- ✓ Defer commitment
- ✓ Deliver fast
- ✓ Psychological safety
- ✓ Optimize the whole

Reducing Waste

- ✓ Unnecessary approvals and reviews
- ✓ Unnecessary process and tools
- ✓ Unnecessary documentation
- ✓ Delays and waiting
- ✓ Momentum and Collaboration
- ✓ Defects

Building Quality into the Process

- ✓ Automate when possible
- ✓ Co-build spot-checks
- ✓ Focus on out of the box
- ✓ Favour low code over custom development
- ✓ Pre-define your design patterns
- ✓ Design for scalability, security and reliability

Defer Commitment

- ✓ Not plan (in excessive detail) for months in advance
- ✓ Nothing is finalized (allow people to change their minds)

Create and Share Knowledge

- ✓ Document your approach, standards and guidelines to remove guess work
- ✓ Lessons learned
- ✓ Co-locate
- ✓ Training

Deliver Fast

- ✓ Document your approach, standards and guidelines to remove guess work
- ✓ Get prototypes and changes to end users ASAP
- ✓ Develop for real (in production?)
- ✓ Automate when possible

Psychological Safety

- ✓ Team members need to feel safe to take risks and be vulnerable in front of the team
- ✓ Allow people to make mistakes
- ✓ Promote open dialogue
- ✓ Communicating proactively
- ✓ Encouraging healthy conflict

How we apply Agile and Lean concepts to M365 Development



Understanding Platforms and Low Code Development

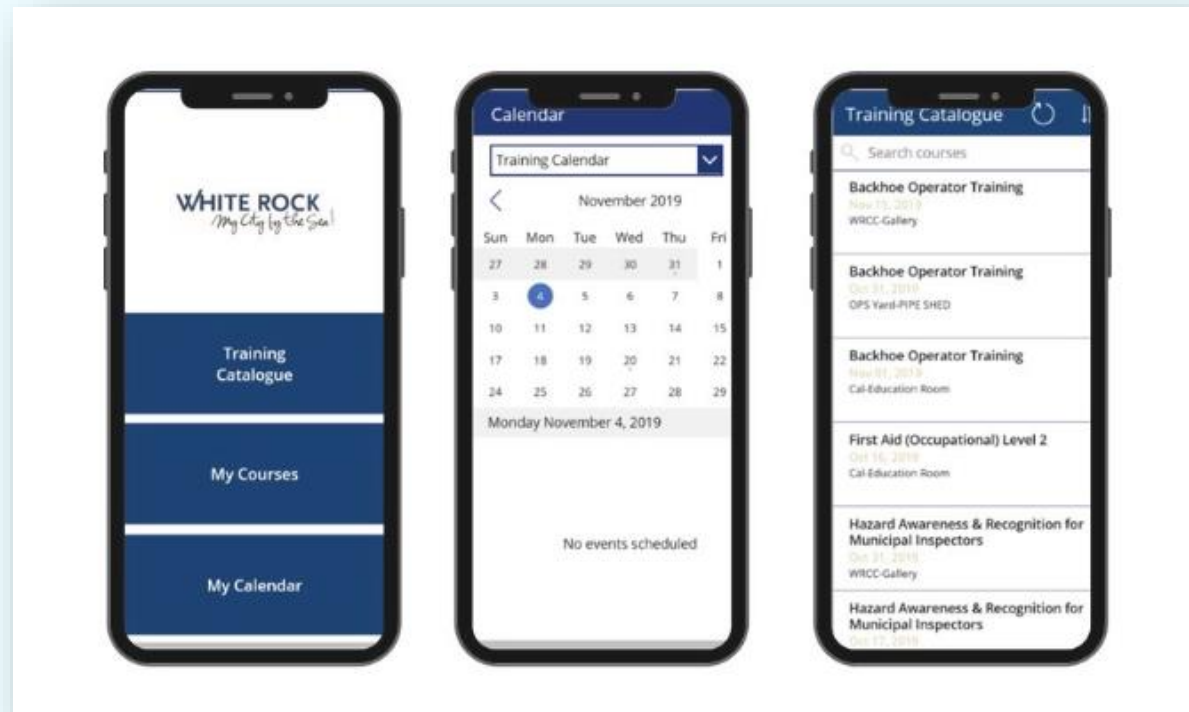
How Microsoft 365 has evolved over time

Platforms

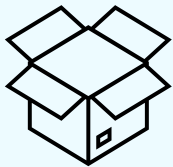
- Expensive software overruns also led to the development of **platforms** (like SharePoint)
- Allowed developers to focus on **high value activities** that differed between projects and were able to reuse more **common elements** (security, search, document management, logging, auditing etc.)
- Many capabilities are **configurable**
- SharePoint is offering more **Out of the Box** with the platform as we move forward

Low Code Development

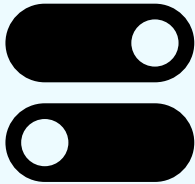
- Providing the ability to **configure** solutions with minimal code (Power Apps, Power Automate) which **reduces overall risk**



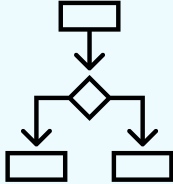
Configuration vs Customization vs Low Code vs OOTB



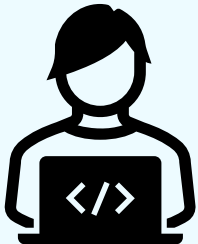
Out of the Box



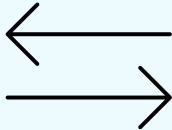
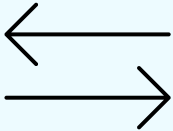
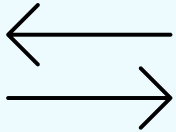
Configuration



Low Code



Code



Risk
\$\$\$



Needs less formal development processes

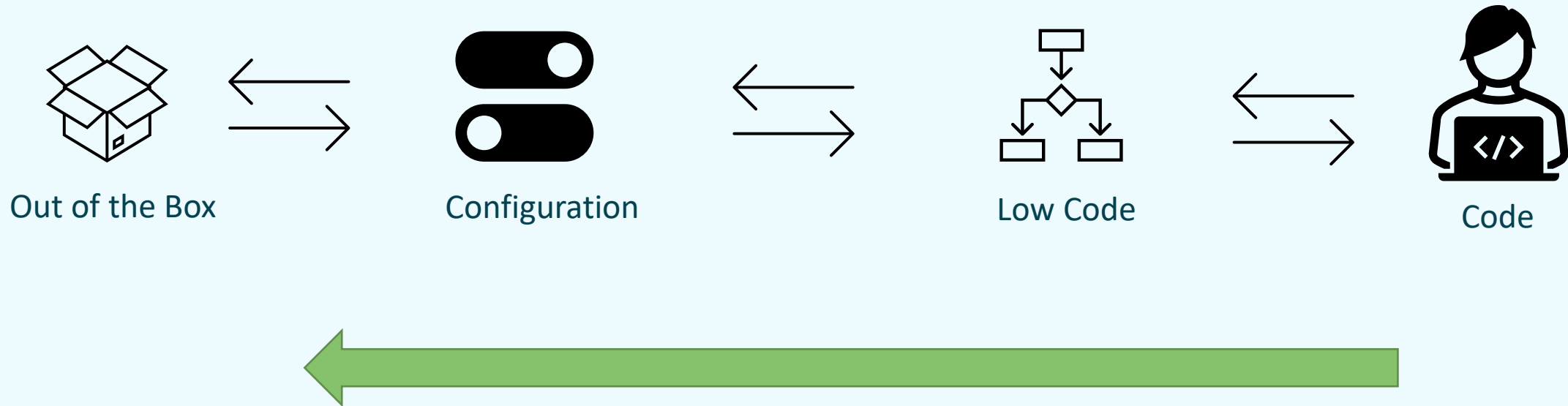
Risk
\$\$\$



Needs formal development processes

**M365 as a platform is
shifting**

M365 Maturing as a platform



“ What three years ago took months of coding is now available out of the box with SharePoint.....

Stig Thompson, Lead Architect, My Digital Workplace, Aria Foods

HUMAN RESOURCES HUB

Employee-focused news, resources

Besides hub news, events, contacts and other resources, this exam site features a custom PowerApp for time off requests from emplo

Site features

Web parts used

Content included

Add to your tenant >

You must be a tenant administrator to deploy this template.

System Requirements

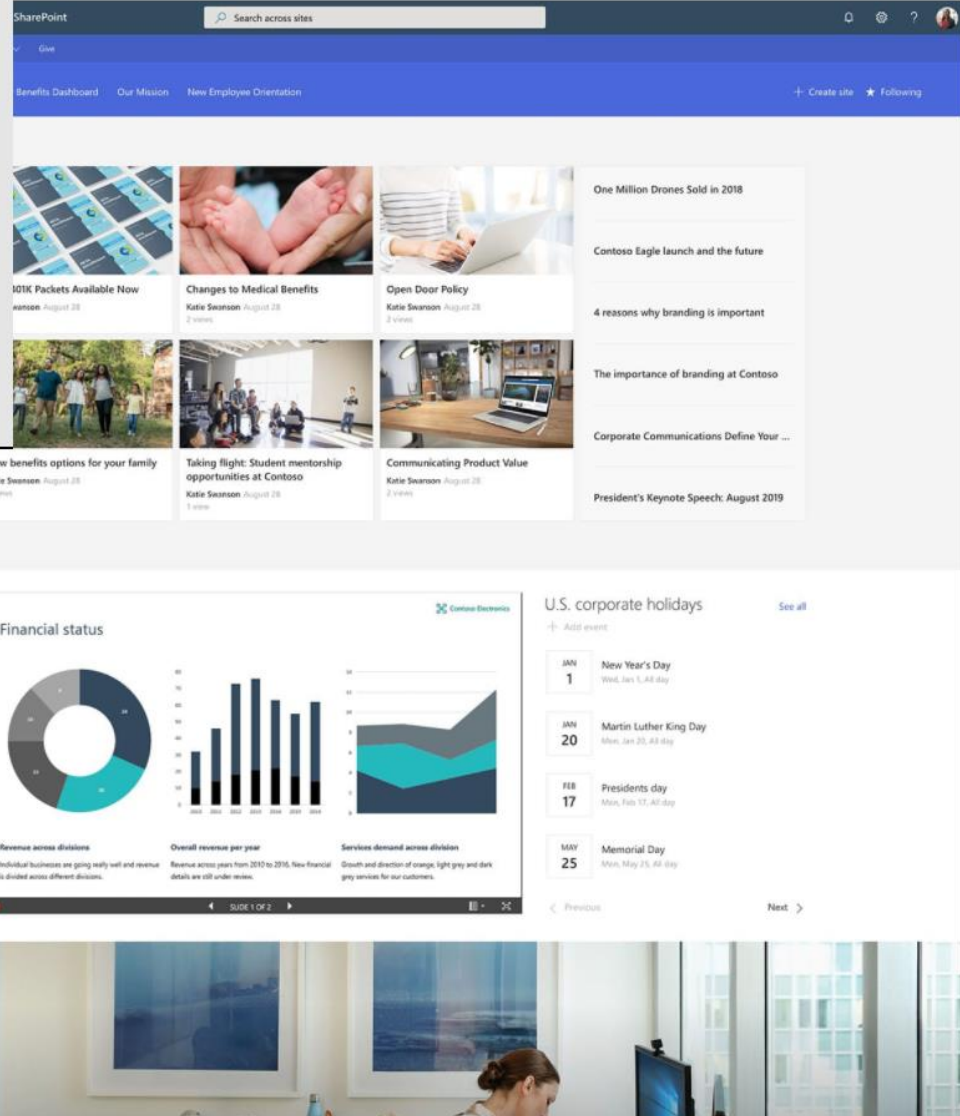
Minimum

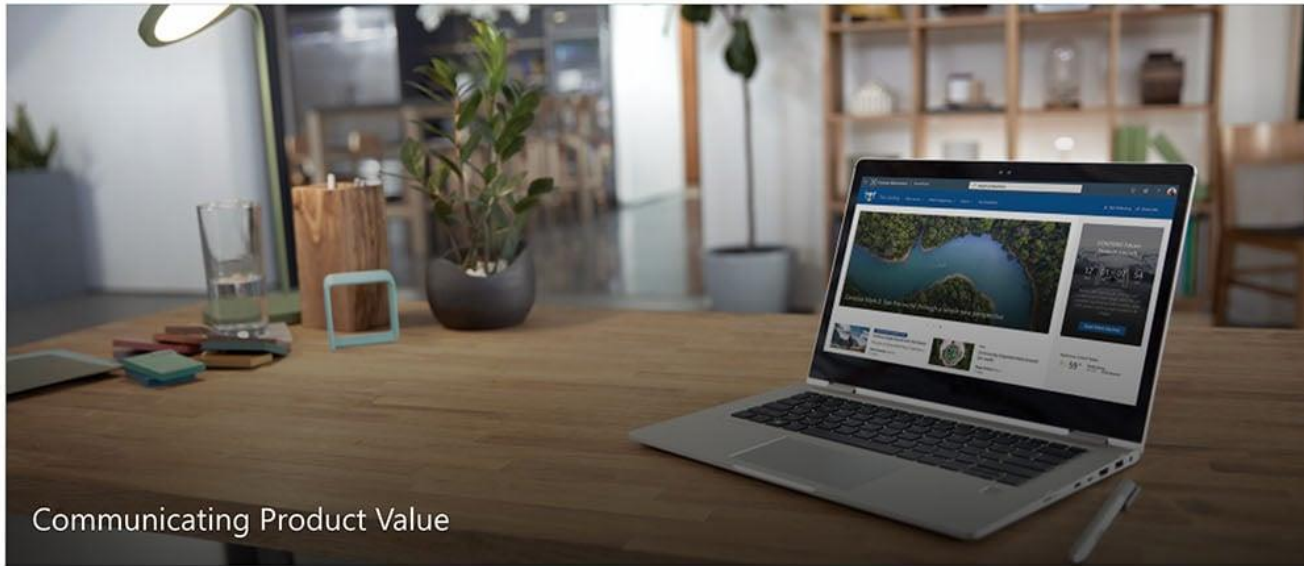
SharePoint version: SharePoint Online

Permission required: Tenant Admin

Site language: English

- Organization > Microsoft 365 learning pathways
- Department > New employee departmental onboarding site
- Team > Workplace Transformation site
- Community > New employee pre-onboarding site
- Solutions > New employee corporate onboarding site
- Schools > Microsoft 365 freelance communications site
- SharePoint Success Site





Communicating Product Value



New 401K Packets Available Now

Please stop by the HR offices to pick up the new 401K packets. These packets contain all the information y...

Katie Swanson August 28



The importance of branding at Contoso

At the heart of branding at Contoso is the promise that is made by us to our customers. The brand pro...

Katie Swanson August 28



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Successful product growth and engagement is fundamentally linked to whether customers underst...

Katie Swanson August 28



Taking flight: Student mentorship opportunities at Contoso

Contoso partners with local schools. Local school dis...

Katie Swanson August 28

CONTOSO Falcon Product Launch

467 days 03 hrs 00 min 31 sec

Packed with features you once thought possible only on much larger platforms into a compact quadcopter that is snappy, agile, and captures stunning high-resolution 8k images.

[READ PRESS RELEASE](#)

Redmond, United States

63°F Mostly Clear 67/61° 09/21/2019 MSN Weather

Redmond, WA

7:59 PM Saturday, 9/21/2019

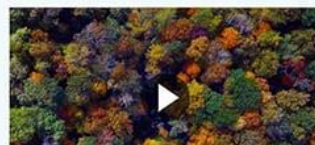
Singapore, Singapore

10:59 AM 15h ahead Sunday, 9/22/2019

Oslo

4:59 AM 9h ahead Sunday, 9/22/2019

Recommended viewing



My news

See all



Communications Strategic communication: How to develop strategic massagi... Joni Sherman 4 days ago





August Town Hall Highlights



Customer Showcase: Amanda Brady, Connecticut wilderness



In the Design Studio with Carlos Slattery



Mark 8 Roadmap

Conversations across Contoso

[View all in Yammer](#)

Leadership Connection



Adele Vance

Last reply Aug 26

2019 Product Pricing - updated doc below 📄

https://m365x377533-my.sharepoint.com/personal/a_delev_m365x377533_onmicros



Like 2 Reply 1 ...

[See more](#)

Lee Gu: Thanks Adele Vance- I made a few updates per our meeting notes

Leadership Connection



Lee Gu

Aug 26

Contoso Eagle launch and the future - July 2018

This year at Drone MAX Paris I had the opportunity to give the keynote address on advancements in dron...

Like Reply ...

[See more](#)

Leadership Connection



Patti Fernandez

Aug 26

The Leadership Team met last week to finalize strategic objectives for the upcoming fiscal year. We will share these with the entire company during th...



Like Reply ...

[See more](#)

Leadership Connection



Contoso

@ContosoInc

Nice @ContosoInc PowerShell example for the #SharePoint root site swap. Worked beautifully - new, modern (demo) communication site now at the root.

watch @Microsoft's Trent Green demo our root site swap at recent #SPC19: youtu.be/mnh5QxyZ6Z0?t=... ... <https://twitter.com/SharePoint/status/1168941313284288512>

YouTube @YouTube



Sep 3, 2019



Contoso

@ContosoInc

We've been using these at @ContosoInc since Sept.2018, and we can say they really make it tough to stay classic. Move to modern and don't look back! <https://twitter.com/mkashman/status/1088278884489953280>

Jan 23, 2019



Contoso

@ContosoInc

We love how our News @ Contoso #SharePoint/#Office365 portal is coming along. We're early adopters for org news, audience targeting, creating authoritative news sites, configuring the #SharePoint News web part, approvals, etc... <3 it.



Communications

Welcome to #CommsChat

Miriam Graham · 4 days ago



Communications

How apps can make corporate communications easier

Lee Gu · 5 days ago



Communications

Singapore trip report

Miriam Graham · 5 days ago

1 view

My recent documents

[See all](#)



Name



IR Handbook

personal > ... > Documents



Over Budget Areas

personal > ... > Documents



Contoso 2019 Medical Benefits

Documents



Contoso Quad Customer Script

Documents



BI Improvement

personal > ... > Documents



Audit of Small Business Sales August

personal > ... > Documents

My frequent sites

[See all](#)



Drone workshop



Contoso News



Sales



Communications

Leadership Connection
Patti Fernandez
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Like Reply ...

See more

Leadership Connection

Patti Fernandez
Aug 26

Due to the great feedback from last year's company meeting, I wanted to include another ke...

- Engineering
- IT
- Research & Development

Like Reply ...

See more

Contoso
@ContosoInc

We love how our News @ Contoso #SharePoint#Office365 portal is coming along. We're early adopters for org news, audience targeting, creating authoritative news sites, configuring the #SharePoint News web part, approvals, etc... <3 it.



Audit of Small Business Sales August
personal > ... > Documents

My frequent sites

See all

- Drone workshop
- Contoso News
- Sales
- Communications
- The Landing
- Communication site

My recommendations

- Contoso 2019 401k Enrollment Guide
MOD Administrator
Edited Apr 26, 2019
- Contoso 2019 Life Insurance
MOD Administrator
Edited Apr 26, 2019
- Contoso Parenting Resources
MOD Administrator
Edited Apr 26, 2019
- Contoso 2019 Medical Benefits
MOD Administrator
Edited Apr 26, 2019



Learning portal



Social groups



Benefits



Give



Programs & teams



Mentorship

More Out of the Box

Common functions and features



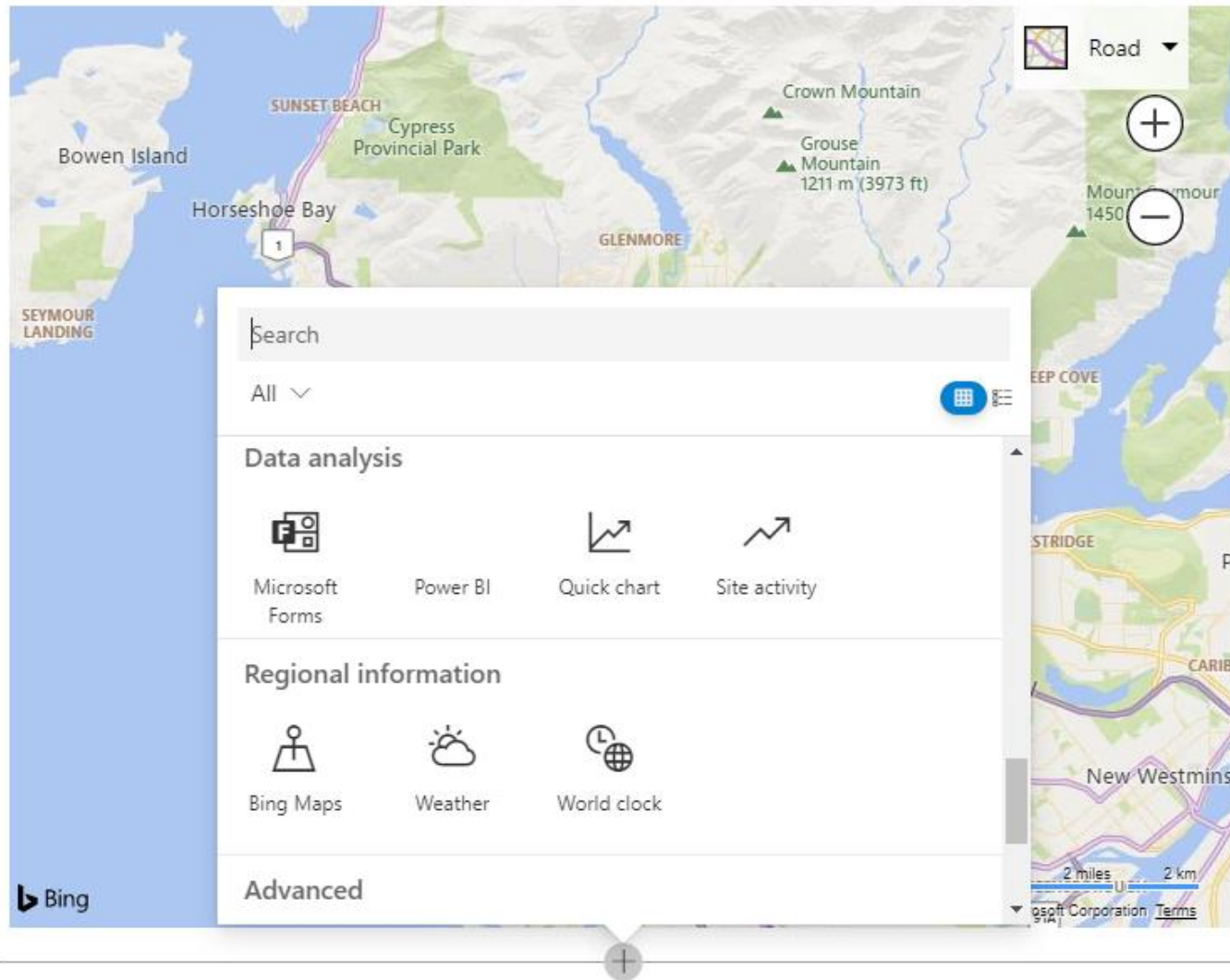
Search

All

Text, media, and content

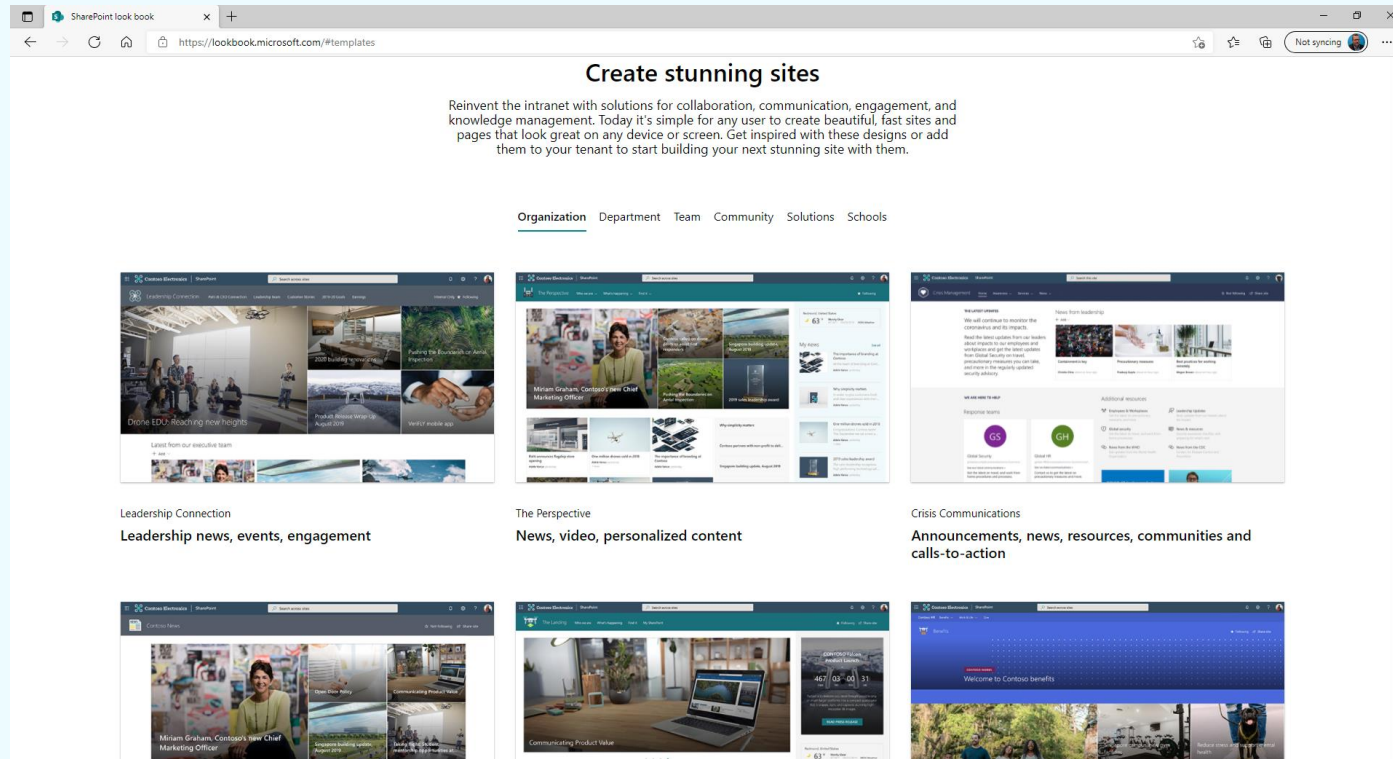
- Button
- Call to action
- Divider**
- Hero
- Image
- Image gallery
- Link
- Quick links
- Spacer
- Stream
- Text
- YouTube

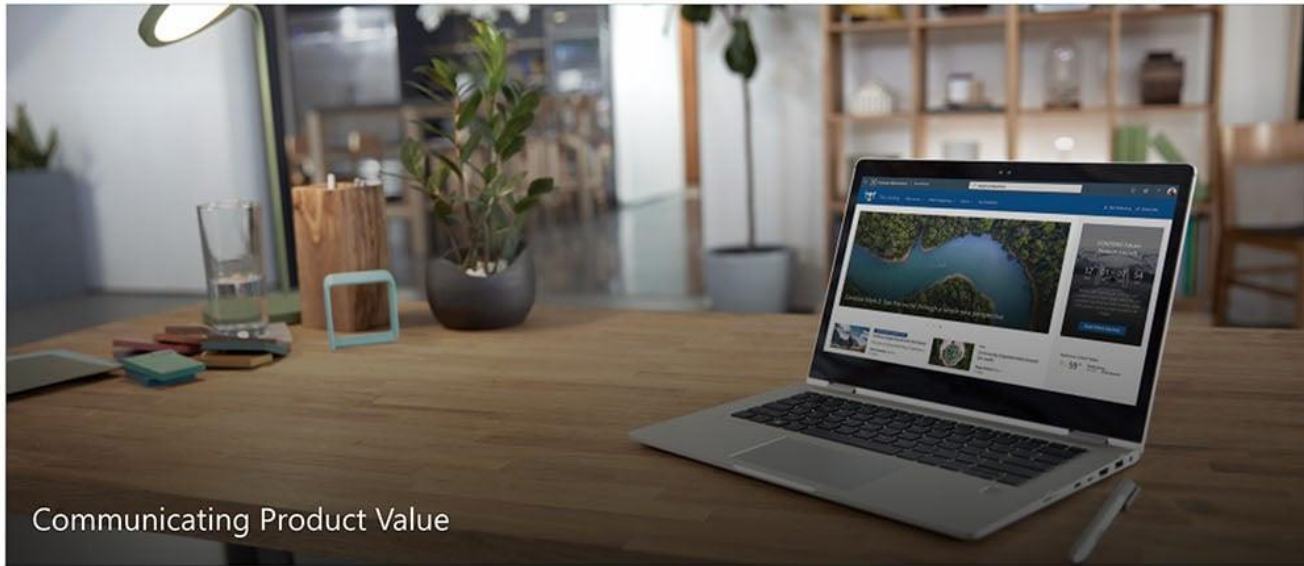
Bing



SharePoint Lookbook

<http://Lookbook.Microsoft.com>





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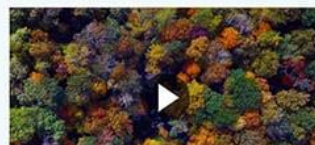
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4:59 AM 9h ahead Sunday, 9/22/2019

Recommended viewing



My news

See all

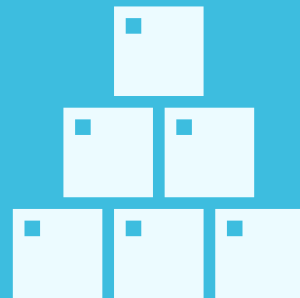


Communications Strategic communication: How to develop strategic massagi... Joni Sherman 4 days ago



More Commoditized Solutions

Common functions and features



Power Apps Templates

Connected sample apps

Less

Org Browser
by Microsoft

Connect to Office365

Contacts
by Microsoft

Connect to Office365

Case Management
by Microsoft

Connect to Salesforce

Opportunity Tracking
by Microsoft

Connect to Salesforce

Task Boards
by Microsoft

Connect to Trello

To Do List
by Microsoft

Connect to Wunderlist

Opportunity Tracker
by Microsoft

Connect to Dynamics

Out of Office
by Microsoft

Connect to Office365

Power Automate Templates

The screenshot displays a grid of 16 Power Automate templates, each with a unique icon set, title, creator, frequency, and usage count. The templates are arranged in a 4x4 grid. The first row includes templates for posting weather updates, saving Outlook attachments to OneDrive, saving Outlook attachments to Dropbox, and completing a custom action. The second row features templates for syncing schoolwork with Google Drive, saving Gmail attachments to Dropbox, getting daily reminders from Outlook, and running sentiment analysis on tweets. The third row contains templates for notifying on file uploads, creating Azure DevOps issues, sending tweets, and triggering Power BI alerts. The fourth row shows templates for saving Office 365 attachments, creating Planner tasks from Outlook events, notifying about SQL DB rows, and cross-posting RSS feeds to Blogger. The final row includes templates for notifying on quiz completion, sending emails from Teams, sending OneDrive files to email, and creating Planner tasks from Forms.

| Template Title | Frequency | Usage Count |
|---|-----------|-------------|
| Post MSN Weather updates to Yammer group everyday | Scheduled | 902 |
| Save Outlook.com email attachments to your OneDrive | Automated | 152058 |
| Save email attachments from Outlook.com to Dropbox | Automated | 4309 |
| Complete a custom action for the selected file | Instant | 20721 |
| Keep my schoolwork in sync with my Google Drive | Automated | 5285 |
| Save Gmail attachments to a Dropbox folder | Automated | 3681 |
| Get daily reminders from your Outlook.com email | Scheduled | 3585 |
| Run sentiment analysis on tweets and push results to a Power BI dataset | Automated | 3725 |
| Notify and Email when a new file is uploaded to OneDrive | Automated | 2546 |
| Create an issue in Azure DevOps when an email is received | Automated | 3713 |
| Send an email for new Tweets about a certain keyword | Automated | 4687 |
| Trigger a flow with a Power BI data-driven alert | Automated | 59955 |
| Save Office 365 email attachments to specified OneDrive for Business folder | Automated | 52777 |
| Create a task in Planner based on Office 365 Outlook calendar event | Automated | 8454 |
| Notify about rows in a SQL DB | Scheduled | 5056 |
| Cross post new items on an RSS feed to Blogger | Automated | 1145 |
| Notify me and store the response when a student completes a quiz | Instant | - |
| Send an email when a new message is added in Microsoft Teams | Instant | - |
| Send OneDrive files to an email | Instant | - |
| Create a task in Planner from Microsoft Forms and post message in Teams | Instant | - |

Prebaked solutions

The screenshot displays the Skylab scheduling application interface. At the top, there is a search bar and a user profile for Gravity Union. The main navigation includes 'Skylab', 'Schedule', 'Requests', and 'Settings'. The current view is a weekly calendar for 'September 19 - 25, 2021'. The calendar shows a week with 9 hours total. A shift for 'Michael Sc...' is assigned for Wednesday, September 22nd, from 8 AM to 5 PM. The interface also includes a sidebar with navigation options like Activity, Chat, Teams, Calendar, Calls, Files, and Shifts. At the bottom, there is a status bar indicating '1 edit ready to share*'.

| Today | 19 Sun | 20 Mon | 21 Tue | 22 Wed | 23 Thu | 24 Fri | 25 Sat |
|--------------------------------------|--------|--------|--------|--------|--------|--------|--------|
| Week: 9 Hrs | 0 Hrs | 9 Hrs | 0 Hrs | 0 Hrs | 0 Hrs | 0 Hrs | 0 Hrs |
| Day notes | | | | | | | |
| ▼ Unnamed group 9 Hrs ... Add people | | | | | | | |
| Open shifts 0 shifts | | | | | | | |
| Michael Sc... 9 Hrs | | | | | | | |
| 8 AM - 5 PM | | | | | | | |

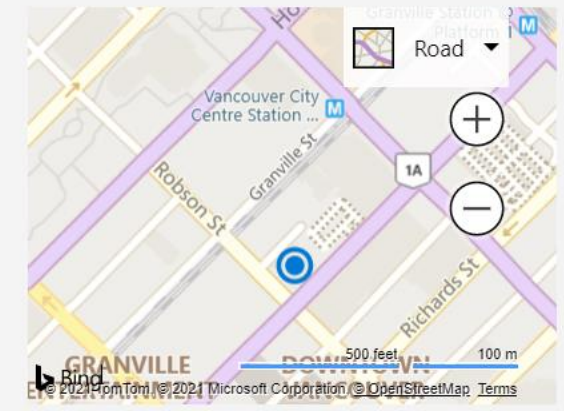
More Complimentary Applications

Various M365 solutions working together





Our office
1240 - 605 Robson Street
Vancouver BC V6B 5J3
(604) 428-6090



See all

- Mission Co...
- Activity
- Chat
- Teams
- Calendar
- Calls
- Files
- Tasks by PL...
- ...
- Apps
- Help

Tasks by Planner and To Do

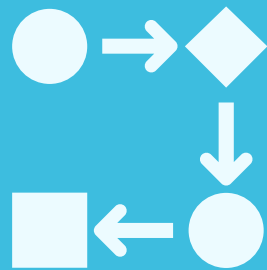
- My tasks To Do
 - Tasks
 - Important
 - Planned
 - Assigned to me
 - Boat
 - Shopping
 - Sushi
 - 1 more list

- Shared plans Planner
 - Point and Collabware Rol...
 - space - Collabspace Impl...
 - SharePoint O365 ECM
 - SharePoint 2019 Employ...
 - A Discovery
 - laboration Sites
 - + New list or plan

| Task title | Source | Priority ↑ | Due |
|---|---------------|------------|---------|
| + Add a task | | | |
| ○ Visioning Document | | | 6/2018 |
| ○ Add Collabware to demo environment | NO OnPrem | | 10/2020 |
| ○ Demonstrate creating files and folders from templates | NO OnPrem | | 11/2020 |
| ○ Demonstrate managing user privileges, including view from restricted access | NO OnPrem | | 11/2020 |
| ○ Demonstrate recovery process of deletion or overwriting | NO OnPrem | | 11/2020 |
| ○ Demonstrate your support process | NO OnPrem | | 11/2020 |
| ○ Show disposition capabilities/workflows | NO OnPrem | | 11/2020 |
| ○ Show email being captured, files and retained | NO OnPrem | | 11/2020 |
| ○ Show employee related documentation | 0/2 NO OnPrem | | 11/2020 |
| ○ Show full EDRMS experience, with focus on records mgmt | NO OnPrem | | 11/2020 |
| ○ Show integration with MS Office suite | NO OnPrem | | 11/2020 |
| ○ Show restricting and modifying folder access for members of same dept | NO OnPrem | | 11/2020 |
| ○ Show software release roadmap and operational impact | NO OnPrem | | 11/2020 |
| ○ Show training plan for end users and admin | NO OnPrem | | 11/2020 |
| ○ Use Case 1 - Records Management | NO OnPrem | | 11/2020 |
| ○ Demonstrate legal hold and e-discovery process | NO OnPrem | | 11/2020 |

Power Platform

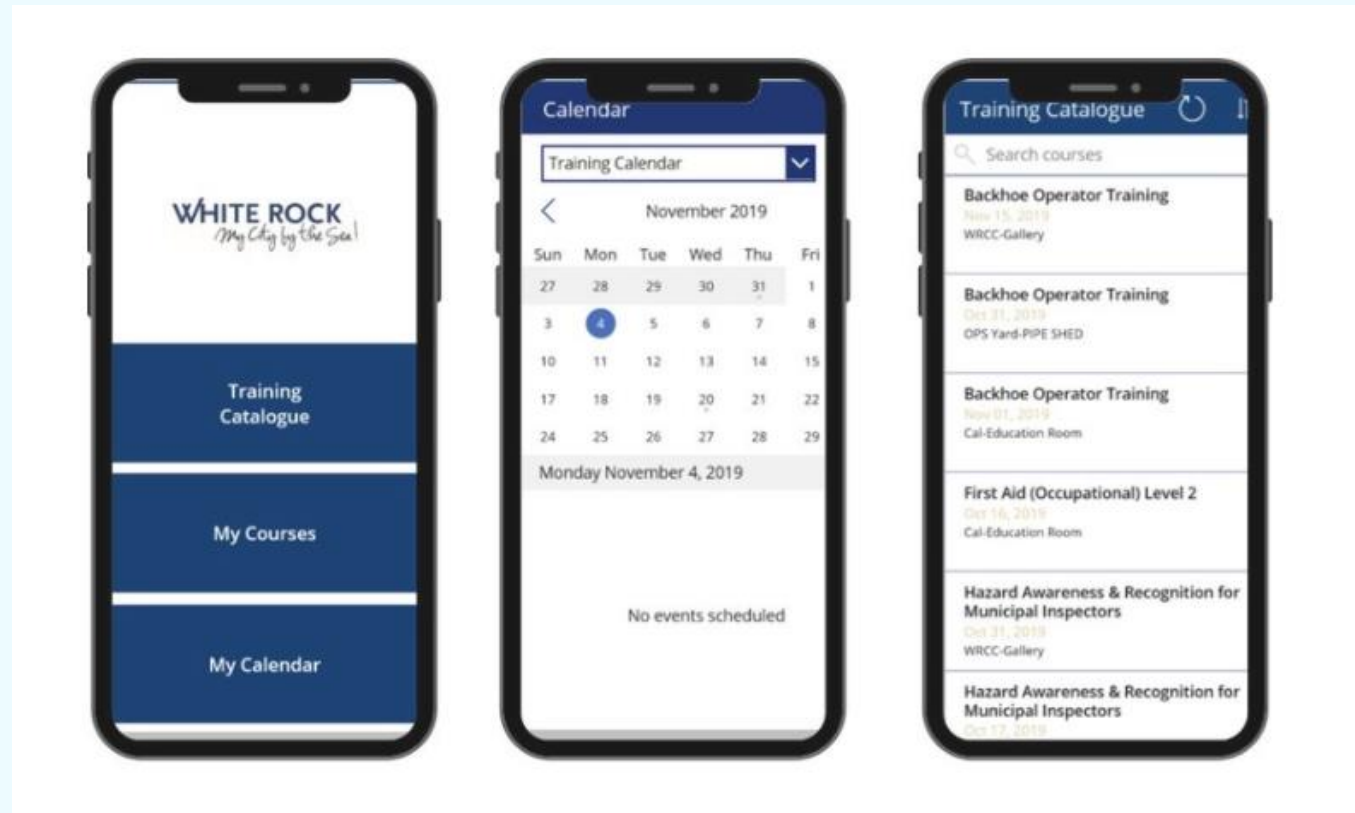
Low Code (lower effort) Applications, Workflow, Integration and Reporting



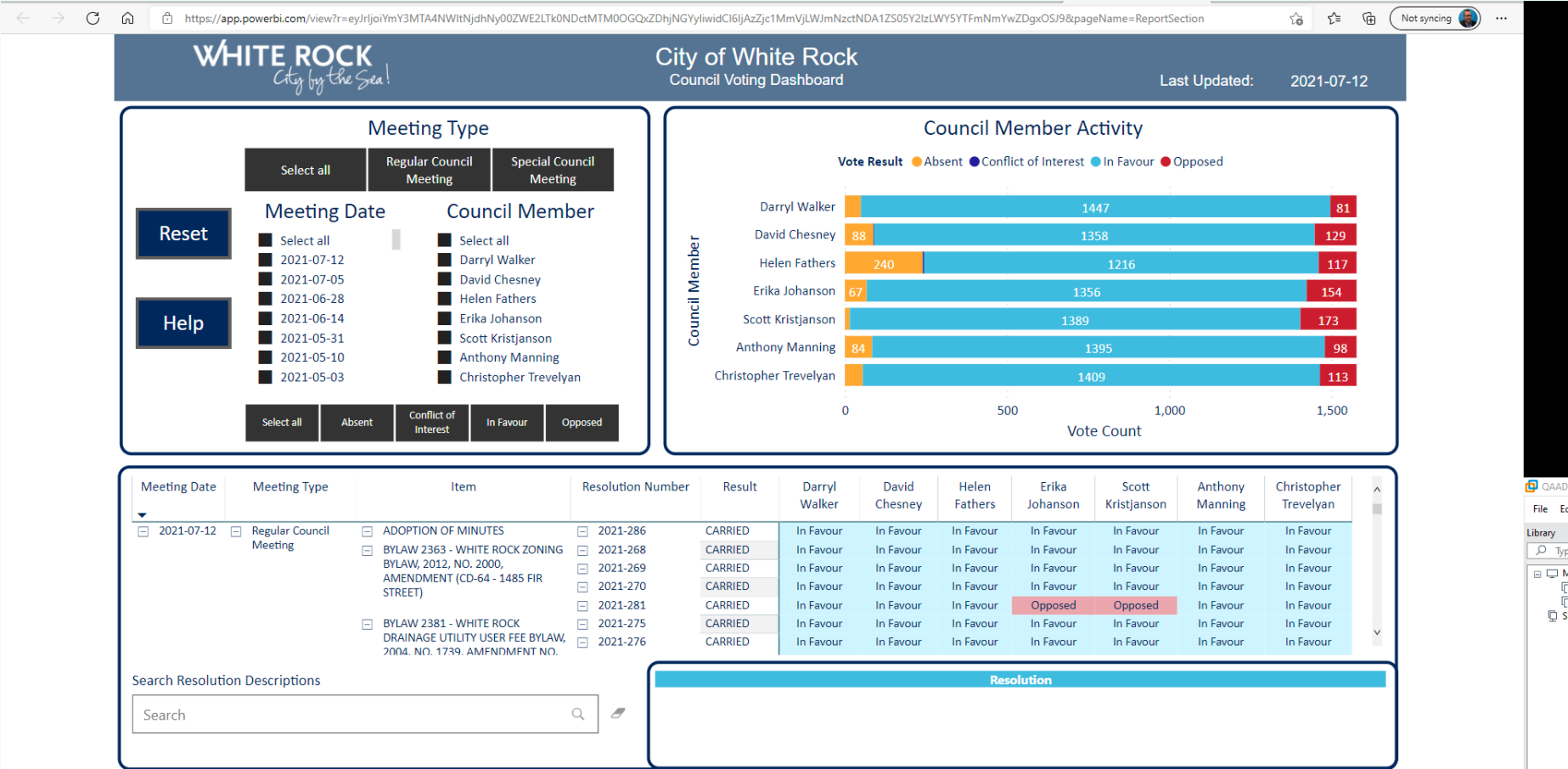
Power Apps

- ✓ Low code development
- ✓ Quick turn around for custom applications (mobile and desktop)

Power Apps



Power BI



Power Automate

- ✓ Robust workflows and automation
- ✓ Integration with line of business systems

Power Automate

The screenshot displays the Microsoft Power Automate interface. The top navigation bar includes the 'Power Automate' logo, a search bar, and environment information ('Microsoft (new default)'). The left sidebar contains navigation options: Home, Action items, Flows (selected), Create, Templates, Connectors, Data, AI builder, Solutions, and Learn.

The main workspace shows a flow titled 'Notify me when a record gets updated'. The flow steps are:

- When a record is created** (Trigger)
- Run a flow built by Power Automate Desktop** (Action)
 - Desktop flow: Automating data sync in Microsoft Access
 - Account name: Account name
 - Level: Level
- Condition** (Logic)

The 'Condition' step is expanded to show two paths:

- If yes** (Green background)
 - Send me an email notification** (Action)
 - Subject: Employee status
 - Body: Employee has **Balance days** balance days left and has completed **Training completion** trainings.
- If no** (Red background)
 - Post message** (Action)
 - Channel name: [Dropdown]

A 'Dynamic values' pane is open, showing a search bar and a list of available values: Account name, Level, City, and Country/Region.

Artificial Intelligence

Common functions and features



AI Builder

The screenshot displays the PowerApps AI Builder interface. The top navigation bar includes the PowerApps logo, the current path 'AI Builder > Build', and environment information 'Environment: All internal users'. A left-hand navigation pane lists 'Home', 'Learn', 'Apps', 'Create', 'Data', 'Business logic', 'AI Builder', 'Build', 'Models', and 'Solutions'. The main content area features the heading 'Enhance your business with AI' and a sub-section 'Make your own AI model'. Four AI model options are presented as cards: 'Prediction', 'Form Processing (preview)', 'Object Detection (preview)', and 'Text Classification (preview)', each with a brief description of its function.

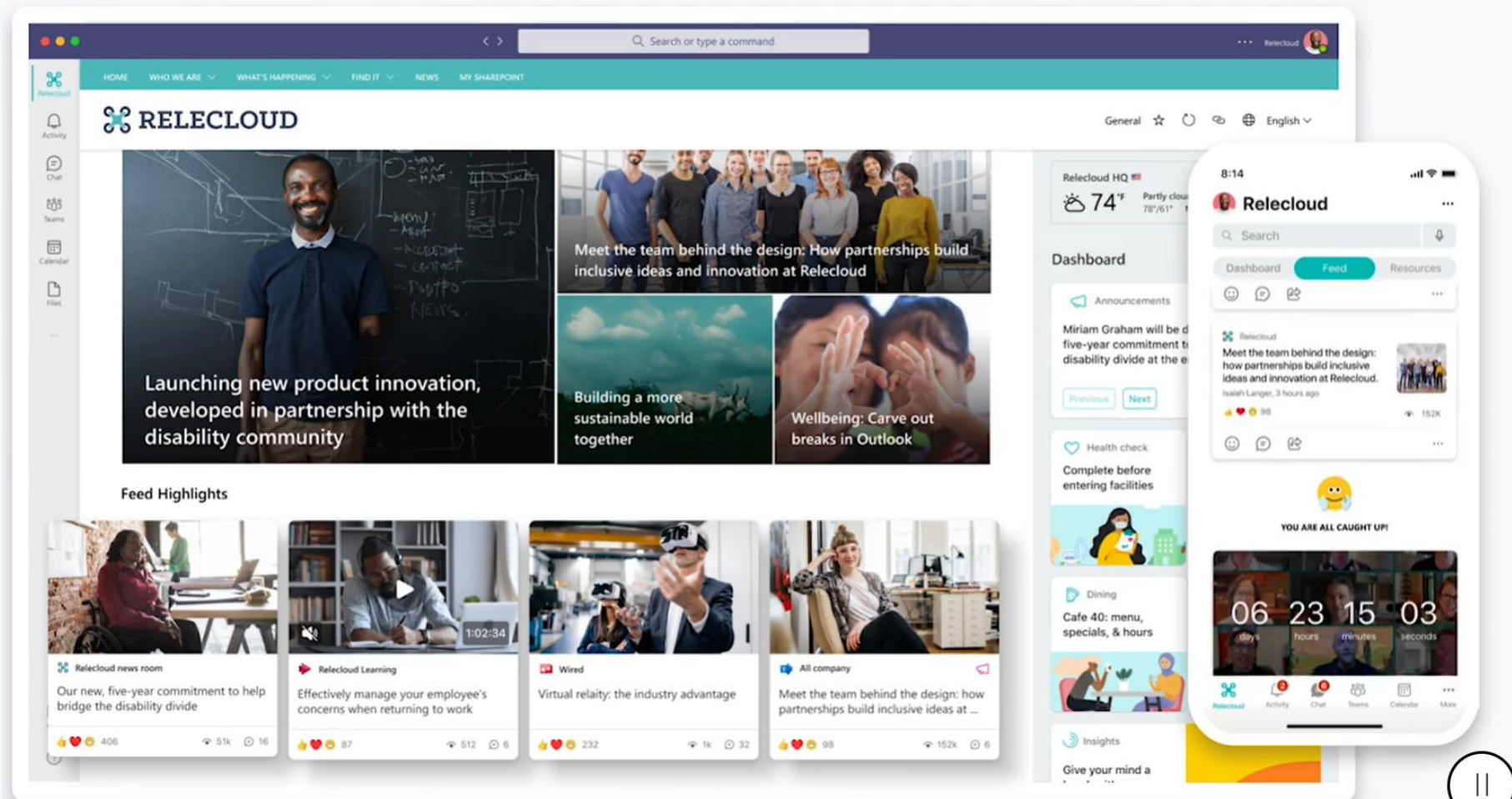
PowerApps | AI Builder > Build | Environment: All internal users

Enhance your business with AI
Add intelligence to your business. Create tailored AI models to automate processes and find insights. [Learn more](#)

Make your own AI model

- Prediction** Predict whether something will happen.
- Form Processing (preview)** Read and save information from standard documents.
- Object Detection (preview)** Recognize and count things in images.
- Text Classification (preview)** Categorize text by its meaning so it's easier to analyze.

Viva Connections



Viva Topics

Viva Topics Home My topics Manage

Activity Chat Teams Calendar Files Topics Apps

Pinned

- Marketing Northwind Traders

Your teams

- Northwind Traders
- General
- Marketing
- Overview
- Performance** 1
- Shiproom**
- Telemetry
- 32 hidden channels

- Tailspin Traders
- Account Teams
- General
- Accounting
- Finance
- Fiscal Year Planning**
- Strategy**
- 6 hidden channels

Search or type a command

Daniela Mandera 9:34 AM

I'm not confident in recommending option 2 or 5 again and feel that we should cut those options from the deck. We've discussed those options with the client before and she believes those are too costly for the brand. If we don't acknowledge those concerns, she may lose confidence in our recommendations.

Reply

Babak Shammass 10:00 AM

Daniela, Daichi mentioned that the client had some changes to our design for the July edits before our Wednesday client sync EOD?

5 replies from Franz, Giselle, and Inna

Kadji Bell 10:23 AM

I thought the client wanted to include a section about the buy one get one offer mentioned she got the budget approved for July.

Reply

Krystal McKinney 9:18 AM

Weekly Update

In yesterday's meeting we looked at investment areas. When I worked on project SOAR for this client too. I'll find some examples for us to look at.

Kian Lambert 9:27 AM

Hey all, as the date for the big pitch nears, I wanted to express how appreciative put in for this. I know there have been some really late nights and weekends. See long history with them.

Reply

Type a new message

PROJECT

SOAR

View details

Alternative names: Sustainable Ops and Renew...

Starting in CY 2021, Relecloud will focus on new verticals for our commercial drones. Project SOAR leads the way in sustain...

From SOAR Goals and Outcomes.docx

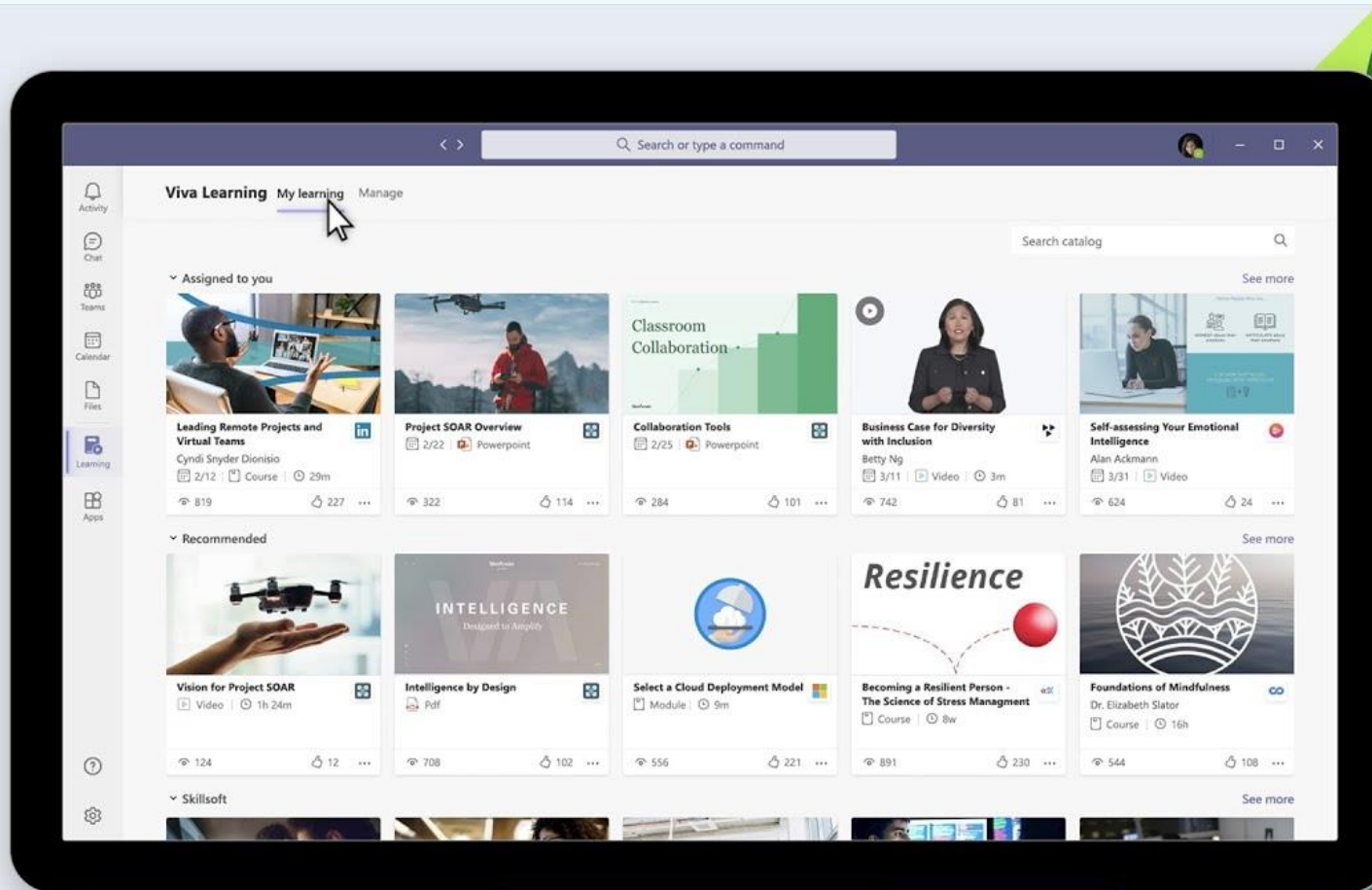
People (3)

- Mona Kane Leads infrastructure engineering team
- Miguel Garcia Project lead and owner of the roadmap

Suggested resources (10+)

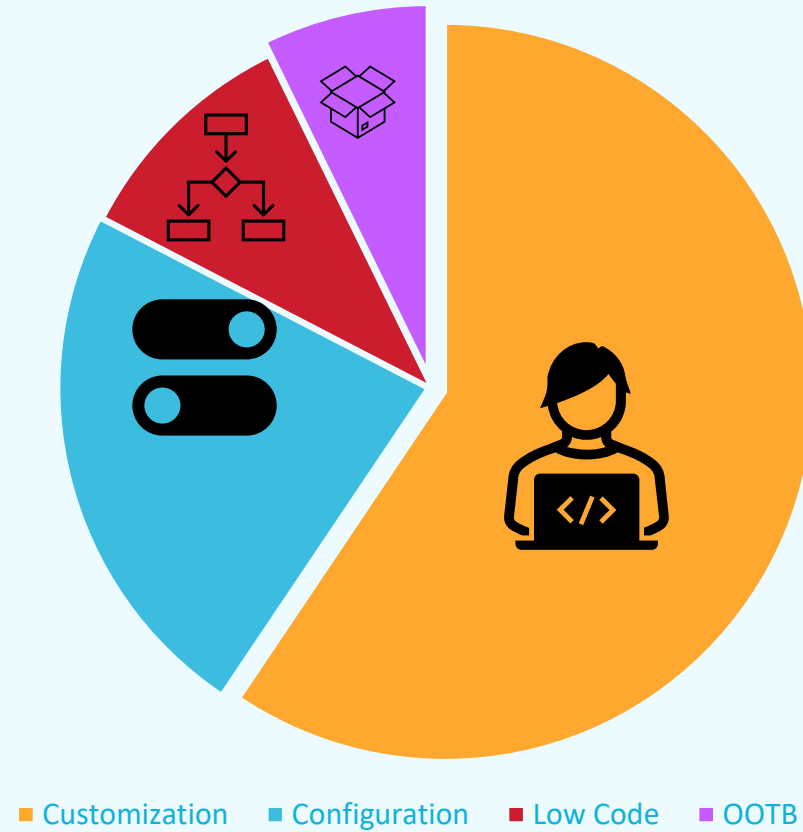
- now EU Regulations: Farm to Fork Topic mentioned 10 times
- Project SOAR Customer Presentation Topic mentioned in this file

Viva Learning



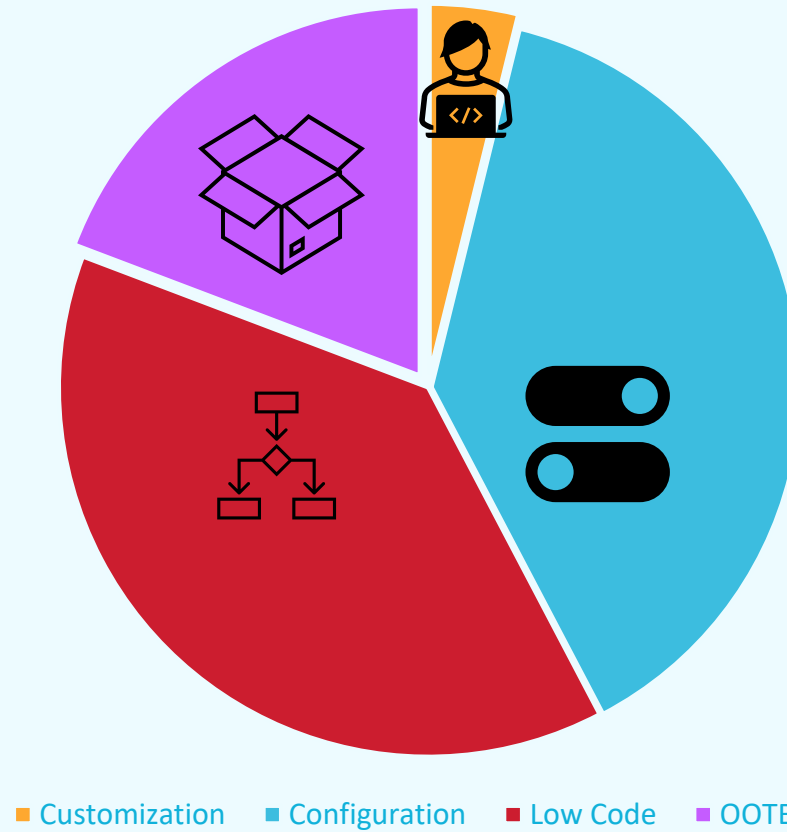
SharePoint (vOld)

SP On Prem Projects

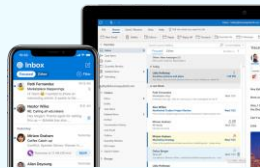


M365

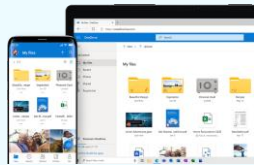
M365 Projects



Not every M365 workload needs development processes



Exchange

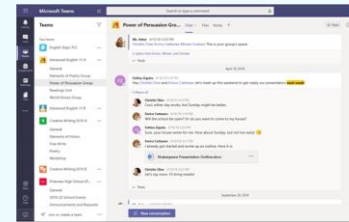
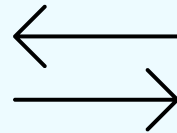


One Drive

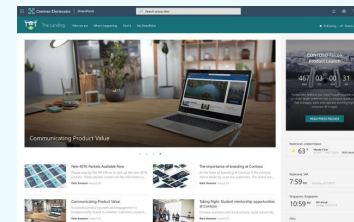


Risk
\$\$\$

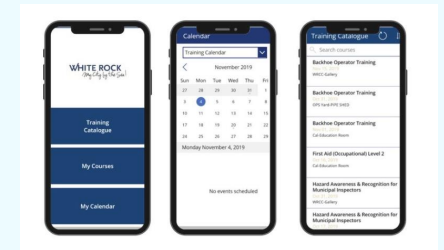
Needs less formal development processes



Teams



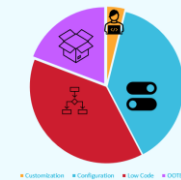
SharePoint



Power Platform

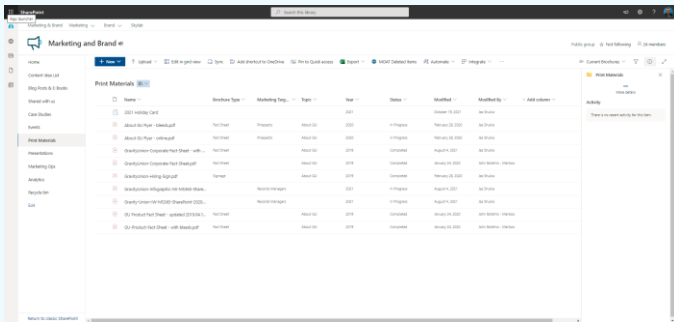


Risk
\$\$\$

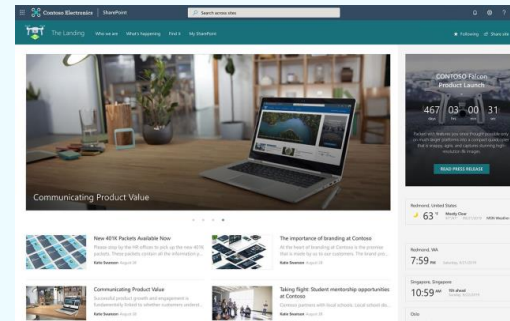


Needs formal development processes

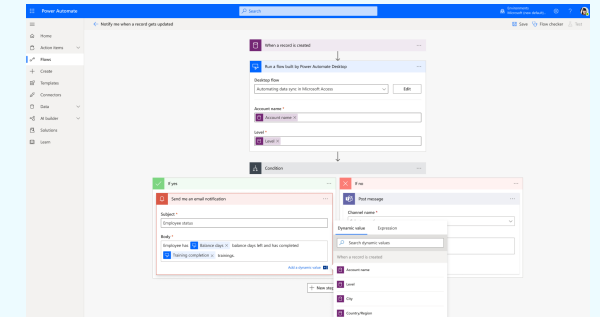
Within SharePoint



Collaboration Portals



Employee Portals



Power Platform



Risk
\$\$\$

Needs less formal development processes



Risk
\$\$

Needs formal development processes

Running Lean and Agile M365 projects

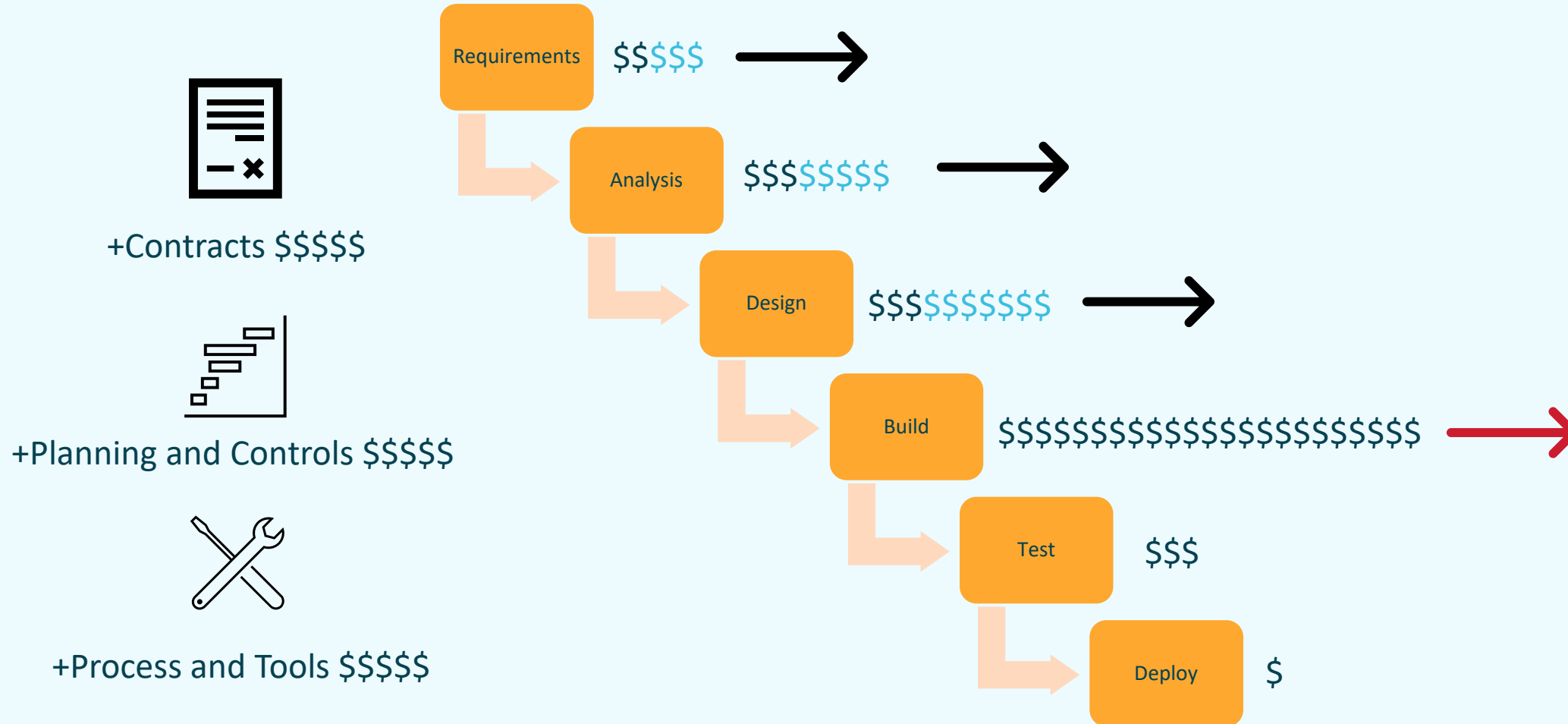
A Brief history of how SharePoint (M365?) on premises projects were run

The year was 2009.....

SharePoint vOld

- ✓ SharePoint was a **bare bones** platform
- ✓ Much of the functionality we needed was **missing**
- ✓ Look and feel was “**rough**” and often needed customization (html, CSS, JavaScript)
- ✓ SharePoint custom development was **VERY** slow and **Expensive**
- ✓ Needed to be developed using **custom** software development methodologies
- ✓ Things that were **configurable** were defined via code and or CAML

SharePoint Waterfall Projects



SP On Prem Environments



Development

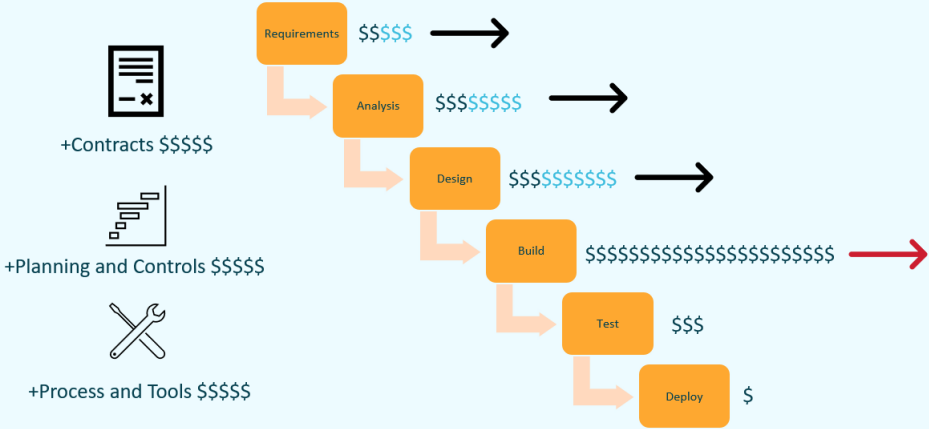


Testing



Production

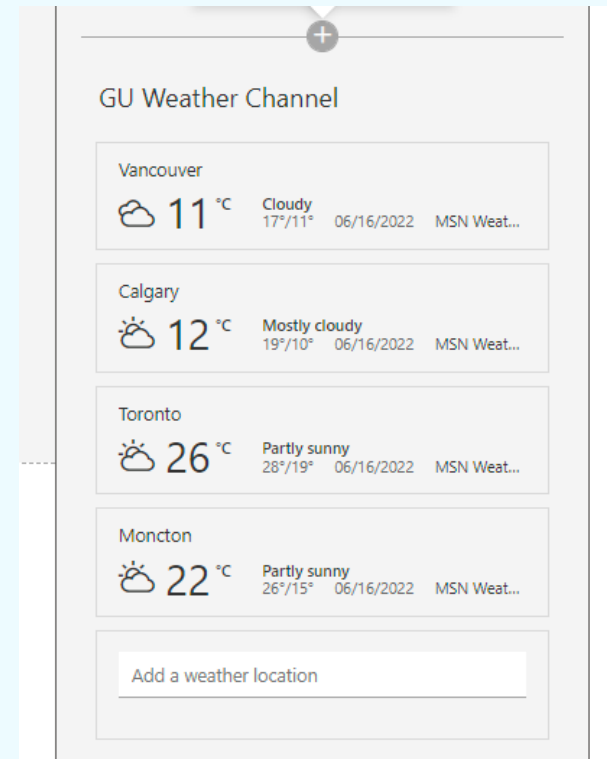
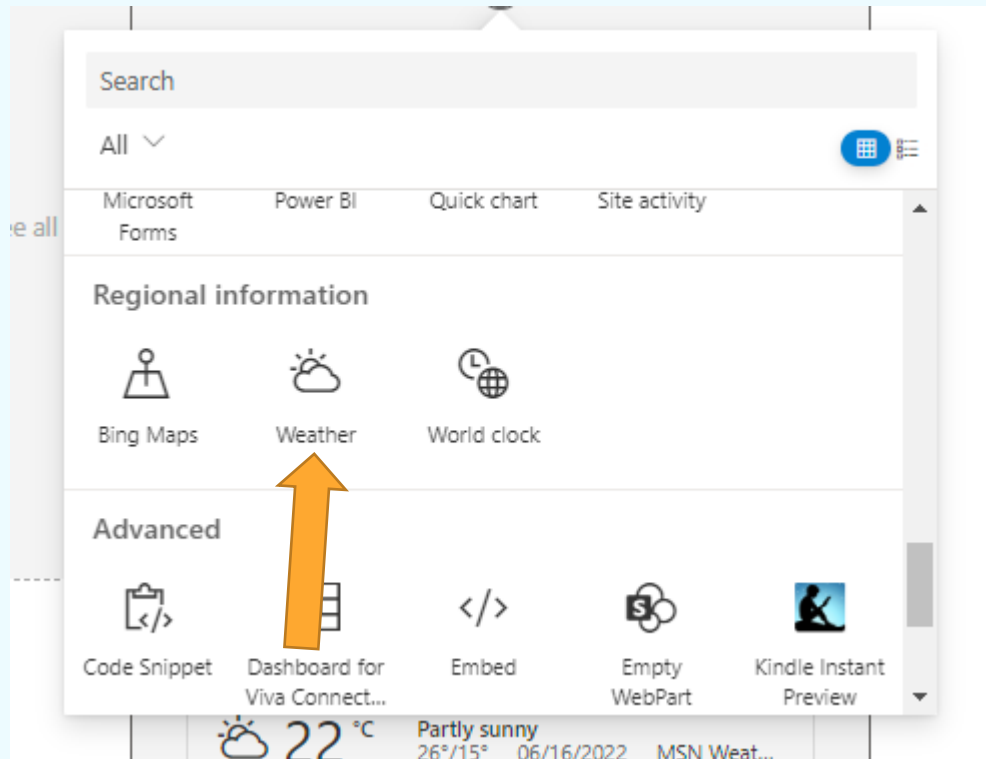
Example: Weather Web Parts



160-320 hours?!



SPO Weather Web Parts (today)



5 minutes?!

Lean and Agile M365

First a story...

There once was a project...

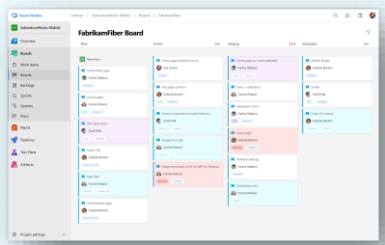
M365 migration project

- ✓ **Migrating 500 users**
- ✓ **5 TB of content**
- ✓ **SPO with records management**
- ✓ **3-4 Million dollar budget**

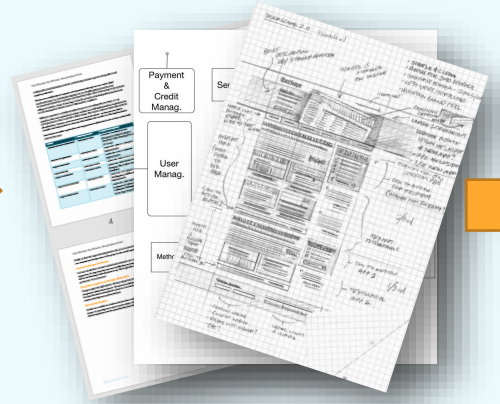
Example

- ✓ **Needed to create a document library**
- ✓ **Needed (OOTB)**
 - ✓ **1 content type with 2 site columns**
 - ✓ **1 document library**

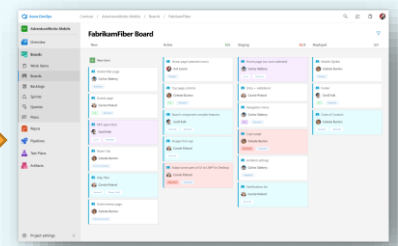
Non lean and agile project 16 hours over 4 days....



Planning, task assignments



Design documentation



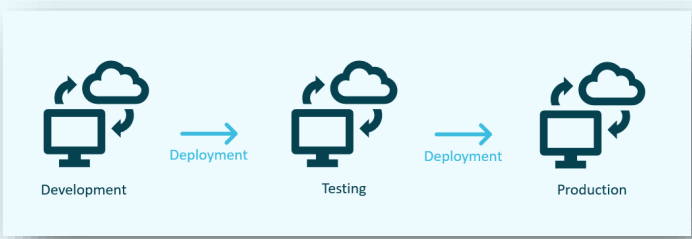
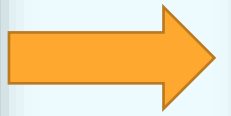
Test plans



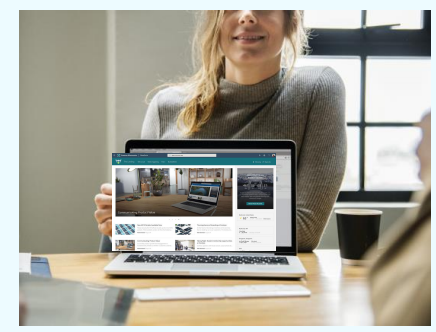
Approval process

```
function g!label:Set-Office365Environment {
    param (
        [ValidateSet('Germany', 'China', 'AzurePPE', 'USGovernment', 'Default')]
        [string] $Environment
    )
    Switch ($Environment) {
        'Germany' {
            $g!label:ConnectionEndpointUrl = 'https://outlook.office.de/PowerShell-LiveId'
            $g!label:SCCConnectionEndpointUrl = 'https://ps.compliance.protection.outlook.com/PowerShell-LiveId'
            $g!label:AzureADAuthorizationEndpointUrl = 'https://login.microsoftonline.de/common'
            $g!label:SharePointRegion = 'Germany'
            $g!label:AzureEnvironment = 'AzureGermanyCloud'
        }
        'China' {
            $g!label:ConnectionEndpointUrl = 'https://partner.outlook.cn/PowerShell-LiveId'
            $g!label:SCCConnectionEndpointUrl = 'https://ps.compliance.protection.outlook.com/PowerShell-LiveId'
            $g!label:AzureADAuthorizationEndpointUrl = 'https://login.chinacloudapi.cn/common'
            $g!label:SharePointRegion = 'China'
            $g!label:AzureEnvironment = 'AzureChinaCloud'
        }
        'AzurePPE' {
            $g!label:ConnectionEndpointUrl = ''
            $g!label:SCCConnectionEndpointUrl = 'https://ps.compliance.protection.outlook.com/PowerShell-LiveId'
            $g!label:AzureADAuthorizationEndpointUrl = ''
            $g!label:SharePointRegion = ''
            $g!label:AzureEnvironment = 'AzurePPE'
        }
    }
}
```

Scripted solution



Multiple environments

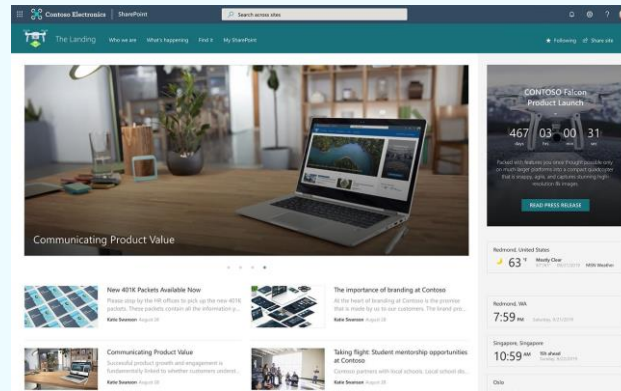


Client Demo

1. Lean and Agile... 5 minutes



requirements



prototype



Demo

Non lean and agile project

- ✓ **3-4 Million dollar project**
- ✓ **80-90% when to administrative overhead (documentation, processes, tools, approvals)**
- ✓ **10-20% went to the solution**
- ✓ **Low quality solution that didn't provide much value 😞**
- ✓ **Little of the cool stuff (AI, Power Apps, Power BI, Power Automate)**
- ✓ **"We didn't have the budget"**

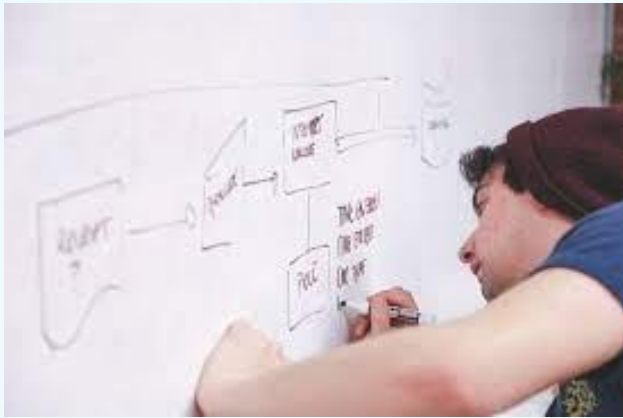
1. Minimize documentation

Create just enough to get you to the next step and help create a shared understanding

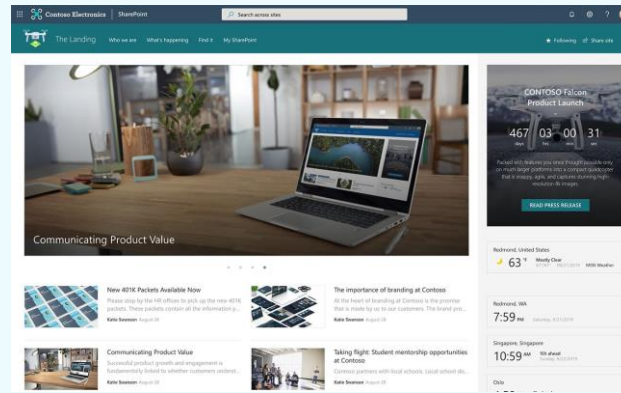
Minimize documentation

- ✓ **Documentation was needed to hedge the risk of building out the wrong solution when developing expensive custom software**
- ✓ **Documentation can now be more expensive than building out the solution in the first place**
- ✓ **Why spend 16 hours documenting, design, reviewing and approving requirements when it only takes one hour to build?**
- ✓ **Our goal is to get something in front of end users as quickly as possible – we need just enough documentation to get us there.**

1. Minimize documentation



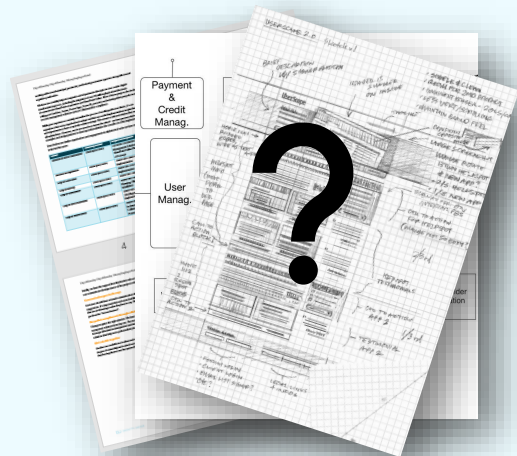
requirements



prototype



Demo



2. Build it out in production

If it's a new solution

Build it directly in production

- ✓ Most SharePoint and Teams solutions – especially when it's a brand new solution can be built out in production with little to no risk
- ✓ Little custom code, little risk of performance impacts, undesired behavior
- ✓ Lots of exceptions (test things out in dev\test) like custom solutions, integration code, records management, Power Platform (sometimes)
- ✓ Tools like ShareGate can be used to easily move content from one environment to another

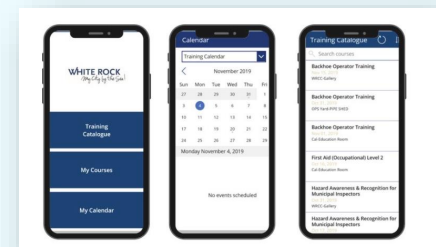
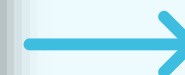
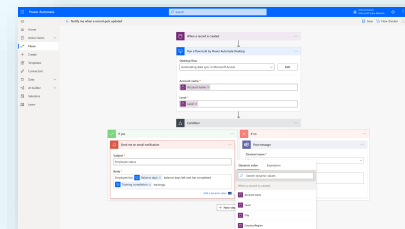
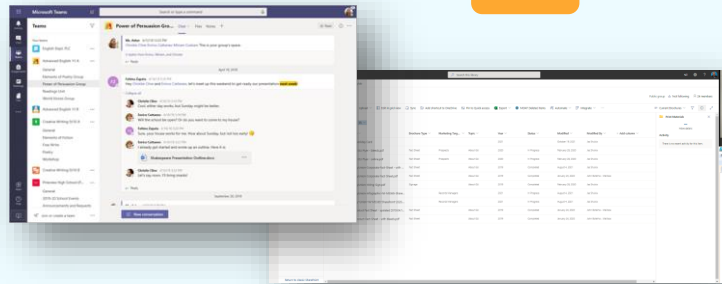
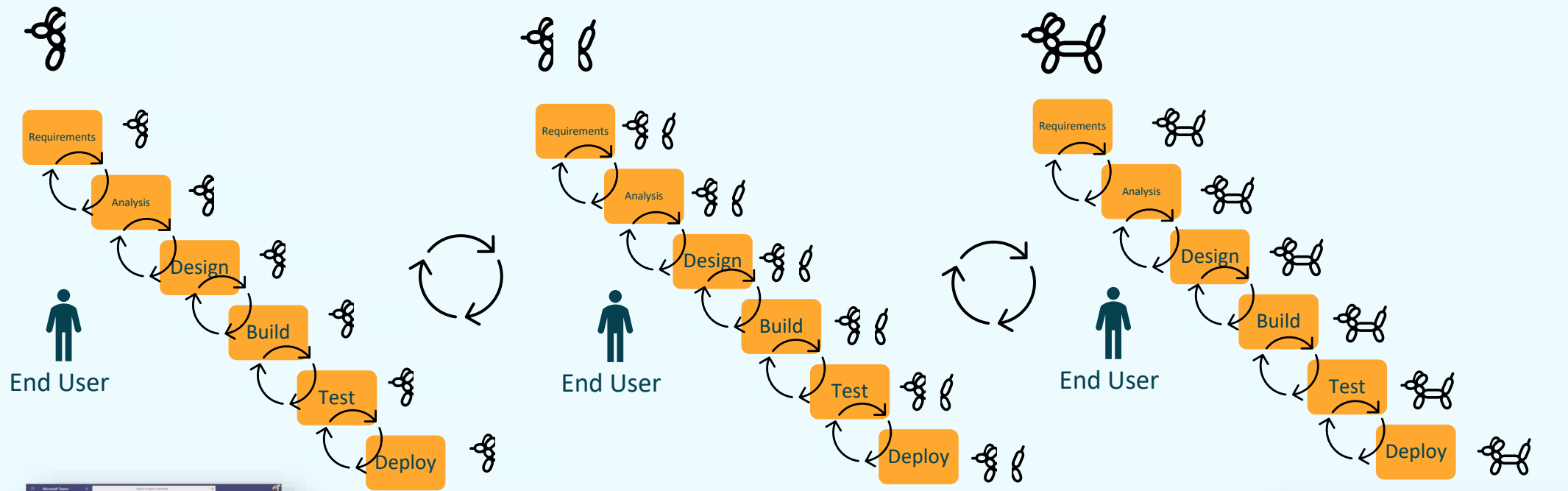
3. Iterate the solution

Focus on minimal viable products

Iterate the solution

- ✓ Go department by department (or area by area)
- ✓ Focus on foundational elements (grass roots movements) – document management and collaboration
- ✓ Then add workflows
- ✓ Then add Power Apps and reporting
- ✓ Let the dust settle in between each iteration before building on top of it to avoid redoing work (workflows, reporting, Power Apps etc.)

Iterating the Solution



4. Engage the end user

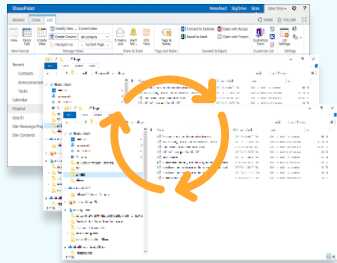
If it's a new solution

Engage the end user

- ✓ The more involvement the better
- ✓ Bring them along for the whole journey

Engaging the end user

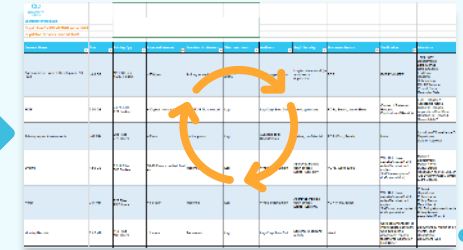
Current state assessment



Solution requirements



Content audit



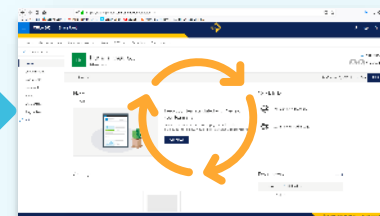
Card sort



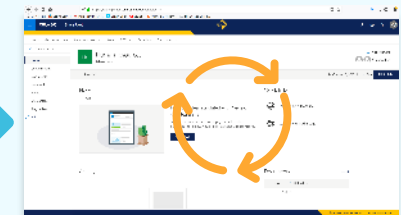
Document and Design



Solution Prototype



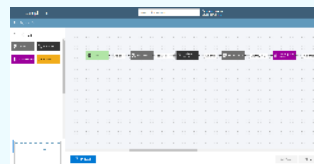
Review and iterate



Migration



Compliance Configuration



Lessons learned



5. Be open to change

Development is much cheaper!

Be open to change

- ✓ Users often don't know what until they can see it
- ✓ Forcing them to sign off creates significant delays
- ✓ Configuring the solutions is relatively cheap
- ✓ Communicate that at any point they can change their mind
- ✓ Helps foster engagement and collaboration

6. Streamline your process

Challenge heavy processes and procedures that are getting in the way



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Streamline your processes

- ✓ As much as possible remove formal approvals, stage gates etc.
- ✓ Project governance was put in place to hedge risk of development costs
- ✓ Solution development cost is now minimal
- ✓ Do we need three levels of approval?

7. Use lightweight tools

Tools should help not hinder

Use lightweight tools

- ✓ If you're spending more time using tools than delivering value then we have a problem

Navigation sidebar with categories: New plan, Planner hub, My tasks, Favorites, Recommended, Recent. Includes a list of colored tiles with initials (DE, NO, M, C, SO, CS, SKY LAB, OT, SKY LAB, MN, D).

Project header: DE [Orange bar]

Board Charts Schedule ...

Members: +11 Members Filter (0) Group by Bucket

Action Items

+ Add task

- Rename the project!
- think of a fun name

0/1

Project Management

+ Add task

- Status reports
- Risk register, budget
- Detailed Project Plan

Discovery

+ Add task

- Deliver Findings document

09-17

M365 Art of the Possible

+ Add task

- SharePoint Training
- Michael Schweitzer
- Review Gravity Union's Approach and Strategy
- Highlight key advantages and disadvantages
- Overview of M365 Roadmap

Planning and Next Steps

+ Add task

- Help create departmental rollout plan
- Help choose first POC group
- Review project plan based off of a similar project
- Make recommendations on planning, preparing, and readiness
- Select migration tools/applications
- Raymond Tishenko

Show completed 4

Show completed 6

Show completed 2

Show completed 2

8. Pre-bake big decisions

Development is much cheaper!

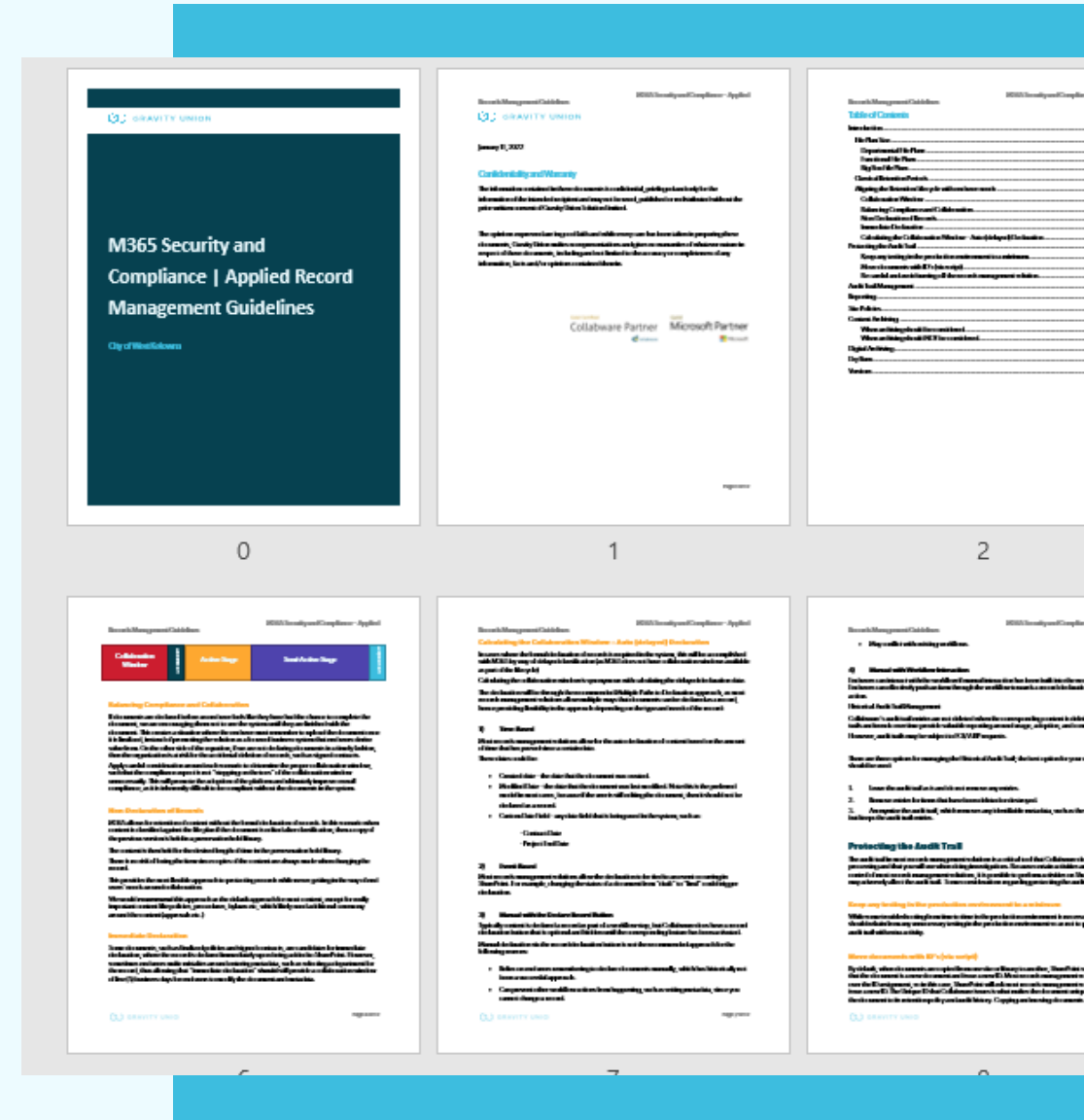
Work through big decisions up front

- ✓ Many decisions can be made up front to streamline design and configuration
- ✓ Will minimize approvals and red tape

Examples

We've documented all our **lessons learned** and **best practices** to share with all our future clients:

- ✓ Information Architecture
- ✓ Security
- ✓ Privacy
- ✓ Applied Record Management (either M365 or Collabspace)
- ✓ Migration
- ✓ Change Management (training, communication and Support)
- ✓ Governance (roles, responsibilities, guidelines, procedures)



Q&A

Thank you!





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