



# Create an effective roadmap for Microsoft 365

April 29, 2021 — Webinar

[www.gravityunion.com](http://www.gravityunion.com)

# Housekeeping

1. Use the Q/A panel to ask questions or share comments
2. The recording will be posted on our YouTube channel:  
([Gravity Union – YouTube](#))

# What we'll cover today

- ✓ Principles for useful roadmaps
- ✓ How to develop a roadmap
- ✓ Microsoft 365 considerations
- ✓ Evolving a roadmap and keeping it relevant

# Introductions



# Michael Schweitzer

President and CEO

- ✓ 20 years of enterprise technology experience
- ✓ Microsoft and Collabware certified
- ✓ Collabware MVP recipient
- ✓ Vancouver Office 365 user group board member
- ✓ ARMA Canada guest speaker
- ✓ Collabware User Group Board Member
- ✓ SharePoint Saturdays guest speaker
- ✓ Over 100 SharePoint ECM projects completed



# Jas Shukla

Director of Business Development

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

# Who we are

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

# Why invest in roadmaps?

# Rationale

- ✓ A communication tool to build alignment and get buy-in
- ✓ A guide to help manage change
- ✓ Maximize investment in the M365 platform

# What is a roadmap?

Let's level set

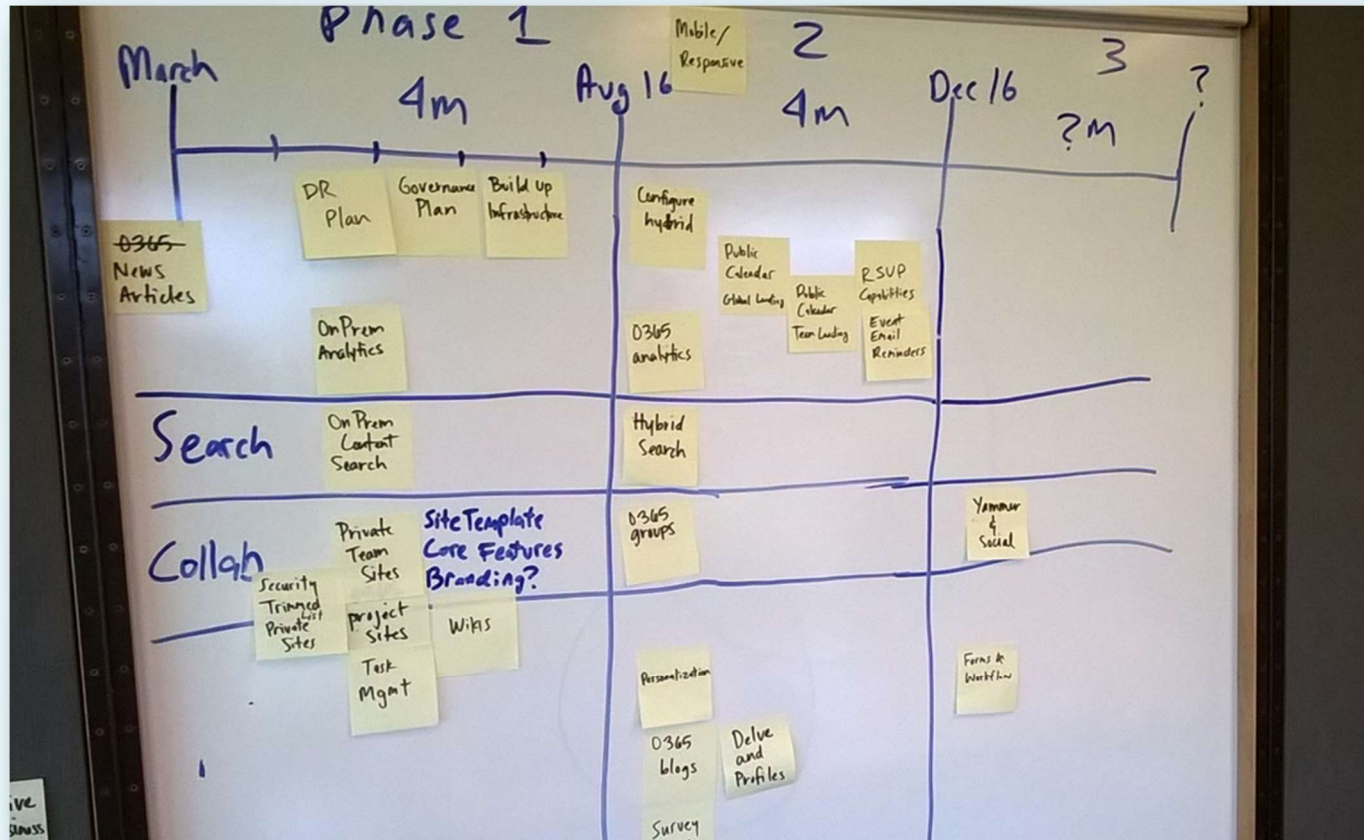
# Typically, it looks something like this...



# Or this...

| Phase        | Kickoff  | Phase 1   | Phase 2   | Phase 3  |   |
|--------------|--|---|---|--|---|
| Capability   | <ul style="list-style-type: none"> <li>• Strategy &amp; Detailed Roadmap</li> </ul>  | <ul style="list-style-type: none"> <li>• Intranet for employee communication</li> <li>• Enterprise knowledge base foundation</li> </ul>         | <ul style="list-style-type: none"> <li>• Project workspaces for team collaboration</li> <li>• Automate simple processes</li> </ul>                            | <ul style="list-style-type: none"> <li>• Advanced workflow planning (onboarding, etc.)</li> <li>• Training and compliance</li> <li>• KB enhancements</li> <li>• Reporting</li> </ul>           | <ul style="list-style-type: none"> <li>• Customer collaboration and extranet</li> </ul>         |
| Activities   | <ul style="list-style-type: none"> <li>• Scope definition</li> </ul>                 | <ul style="list-style-type: none"> <li>• Design and information architecture</li> <li>• Mobile design</li> <li>• Migration plan</li> </ul>      | <ul style="list-style-type: none"> <li>• Project team sites</li> <li>• Business process mapping</li> </ul>  | <ul style="list-style-type: none"> <li>• Complex process mapping</li> <li>• Managing certifications, training, compliance</li> </ul>   | <ul style="list-style-type: none"> <li>• Customer and Partner collaboration planning</li> </ul> |
| Tech         | <ul style="list-style-type: none"> <li>• Implementation planning</li> </ul>          | <ul style="list-style-type: none"> <li>• Content Management</li> <li>• Content Migration</li> <li>• Mobile</li> <li>• Search Centre</li> </ul>  | <ul style="list-style-type: none"> <li>• Project Site Template</li> <li>• Workflow Tools Assessment</li> <li>• Forms &amp; Workflow Pilot Solution</li> </ul> | <ul style="list-style-type: none"> <li>• Forms &amp; Workflow Creation</li> <li>• Compliance management</li> <li>• Retention and Review</li> <li>• Integration with reporting tools</li> </ul> | <ul style="list-style-type: none"> <li>• Content Migration</li> </ul>                           |
| Change Mgmt. | <ul style="list-style-type: none"> <li>• Accountabilities &amp; Alignment</li> </ul> | <ul style="list-style-type: none"> <li>• Recruit Branch Champions and Content Owners</li> <li>• Training</li> <li>• Governance Model</li> </ul> | <ul style="list-style-type: none"> <li>• Training Plan</li> <li>• Team Site Owner Training</li> <li>• Workflow Training</li> </ul>                            |  | <ul style="list-style-type: none"> <li>• Extranet Training</li> </ul>                           |

# They can be less formal...



# They can be detailed...

| Phase and Time            | PHASE 1<br>(TARGET COMPLETION: 30 SEPTEMBER 2014)   |  |   |   |  |  |  |  |   |   |   | Phase and Time            | PHASE 2<br>(TARGET COMPLETION: 15 DECEMBER 2014)   |   |  |                           |
|---------------------------|---|--|---|---|--|--|--|--|---|---|---|---------------------------|--|---|--|---------------------------|
|                           | STRUCTURAL COMPONENTS   |  |   | EMPLOYEE PORTAL FOUNDATION  |  |  |  |  | SAFETY AND OPERATIONS   |   |   |                           | Focus  | TEAM COLLABORATION  |  | NETWORKED COMMUNITY       |
| Feature                   | Location and/or employee type selector  | Information discovery and search   | Corporate communication and KPIs  | Policies  | Employee profiles and people finder  | Corporate culture and brand                    | Employee essentials  | Tools and How Do I...?   | About Precision Drilling  | Health and safety ("PD Pedia")  | Basic KPIs  | Feature                   | Team and project spaces  | Team site directory   | Employee conversations and community                           | Feedback and people tools |
| Content considerations    | Targeting content, complicates solution, and makes content creation and maintenance more intensive. | Extend search to other repositories  | Potentially intensive workload to create and curate portal content. Needs executive buy-in for leadership updates.    | Leverage a lot of content from PD Pedia.  | Orchestration with SAP, Active Directory and SuccessFactors required.                          | Much of this exists. Needs to be consolidated. | Could be split between repositories. Needs to be accessed via portal but could reside elsewhere. | PD Pedia, Greenbook, Doghouse  | Some will exist, some will be net-new content.  | Most content exists. Needs to be aggregated and organized.  | Does the data exist today? Where does it reside? How current is it? | Content considerations    | Potentially aligns with business processes (eg sales) or business assets (eg rig).                           | None.   | None.  | None.                     |
| Governance considerations | No changes to typical content governance considerations.  | Some level of operational focus required to manage and refine search on an on-going basis. | Potential for workflow to communicate key information or changes to the portal. To be covered in Governance Workshop. | Potential for workflow to communicate key information or changes to the portal. To be covered in Governance Workshop. | Determines how much information is displayed, how much can be managed by employees themselves. | Ownership is critical                          | None.  | Potential workflow or process around updating materials. (Likely exists already). Potentially the ability to track receipt of new or changed policy. | Potential for workflow to communicate key information or changes to the portal. To be covered in Governance Workshop. | Potential for workflow to communicate key information or changes to the portal. To be covered in Governance Workshop. | None.   | Governance considerations | Many governance considerations. Usage policies, information retention, training for end users, support, etc. | Usage policies and some end-user training or awareness maybe required to optimize usage and value received. | Usage policies need to be defined, communicated and monitored. |                           |
| Project touchpoints       | None.   | None.  | None.   | PD Pedia content overlap.   | SAP/SuccessFactors   | None.  | MySAP/SuccessFactors, Employee Lifecycle Project.  | Lotes Notes Migration Project  | None.   | Consider Brainshark or similar tool to create comprehension and adoption.   | SAP/BV and Business Objects.  | Project touchpoints       | Intersection and coordination required with DM and/or Lotes Notes Migration projects.                        | None.   | None.  |                           |





# A M365 roadmap answers:

- ✓ What business problems are we solving for?
- ✓ Which services do we enable for our users?
- ✓ How do we break up Microsoft 365 opportunities into projects?
- ✓ When do we engage different groups and departments?
- ✓ How long will those projects take?
- ✓ How much budget do we need for the rollout?
- ✓ What extensions, customizations or third-party tools do we need?
- ✓ What products or technology are we replacing?

# Roadmap principles

## Guiding principle #1

# A living document.

A good roadmap is not a contract. It's a statement of direction and intent, but it will likely change.



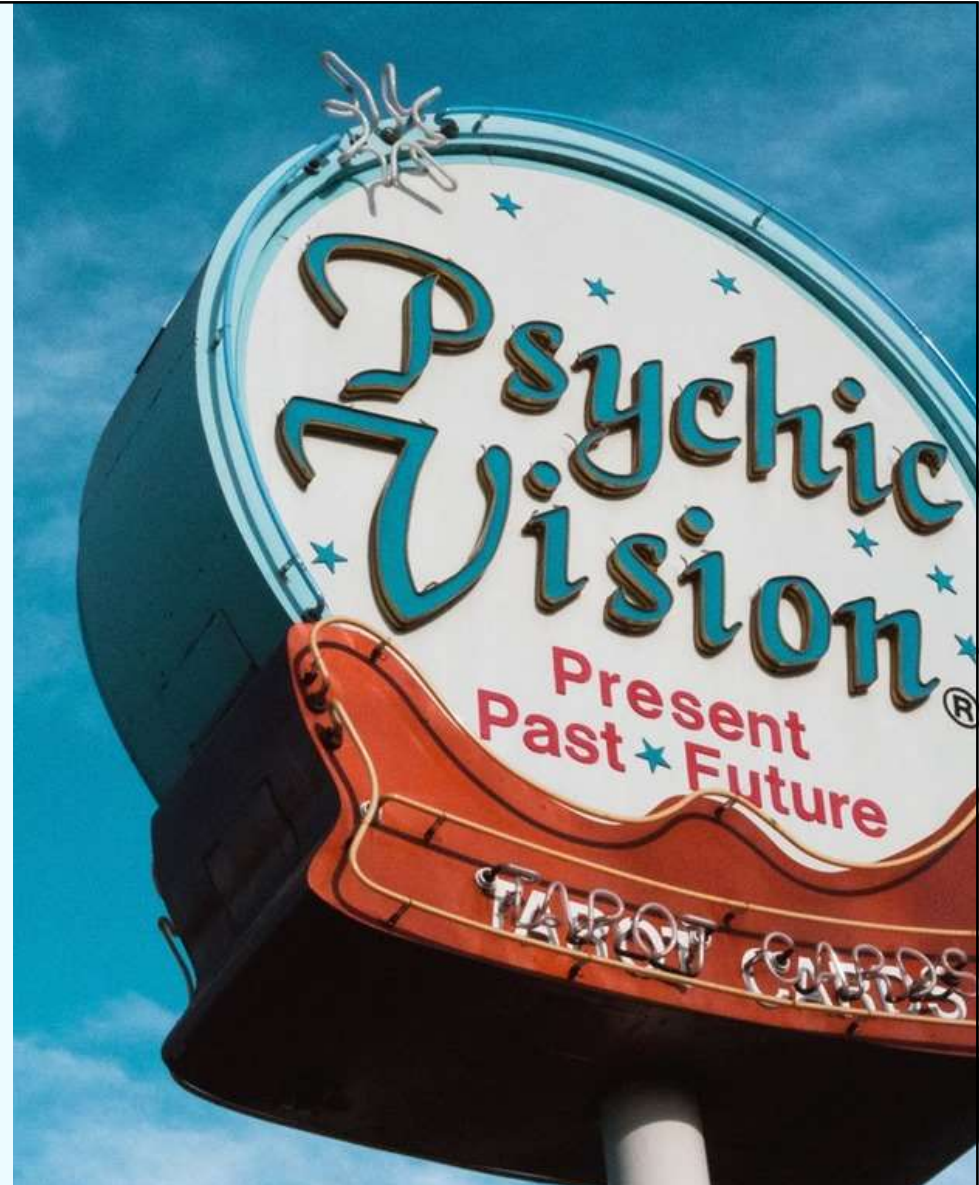
## Guiding principle #2

# Focus on outcomes, not features

Add quick wins to deliver value early

Think about bundled 'releases'

Add themes and value propositions – it's more than just a list of technologies



### Guiding principle #3

## You're never done.

Think of the initiative like a product, you're never 'finished.'

Pick a tool that is easy to use to keep the roadmap updated  
(e.g. Excel, PowerPoint, Planner)

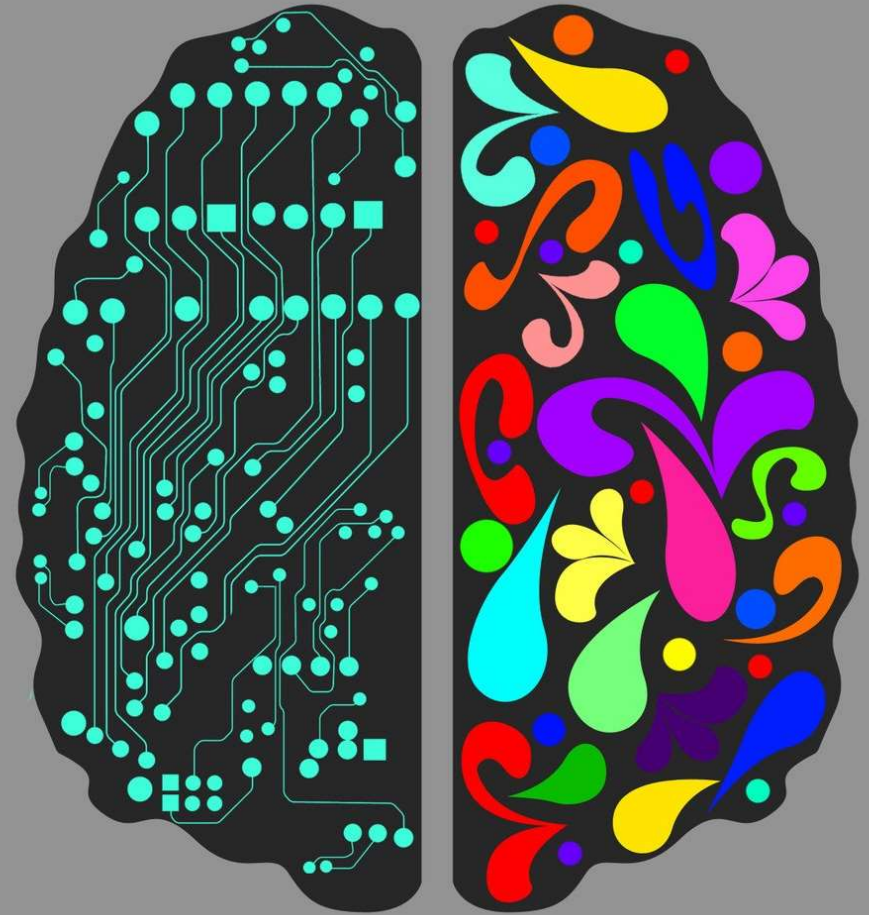


## Guiding principle #4

# Keep both a technology and change management mindset

The platform changes frequently and you can't plan for all the updates.

Embed change management and communication in.

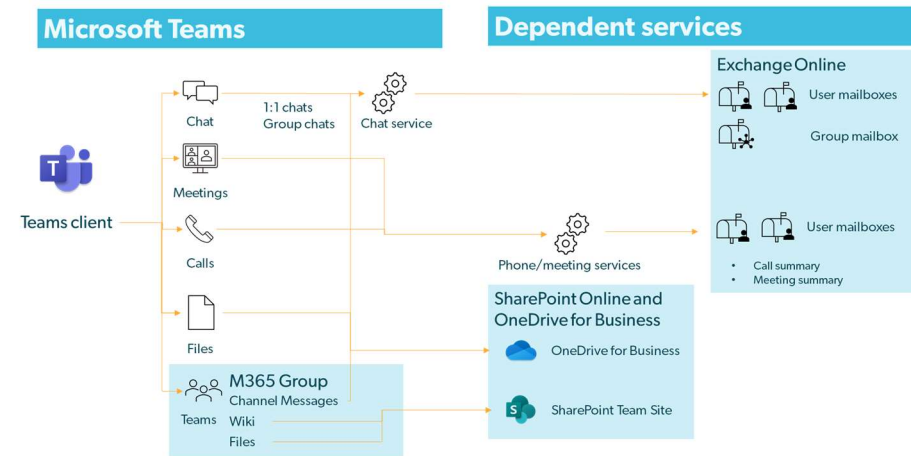


## Guiding principle #5

# Enable-first approach

Don't disable everything out of the gate!

Microsoft 365 is an interconnected, highly dependent suite of services. It's designed to work together.



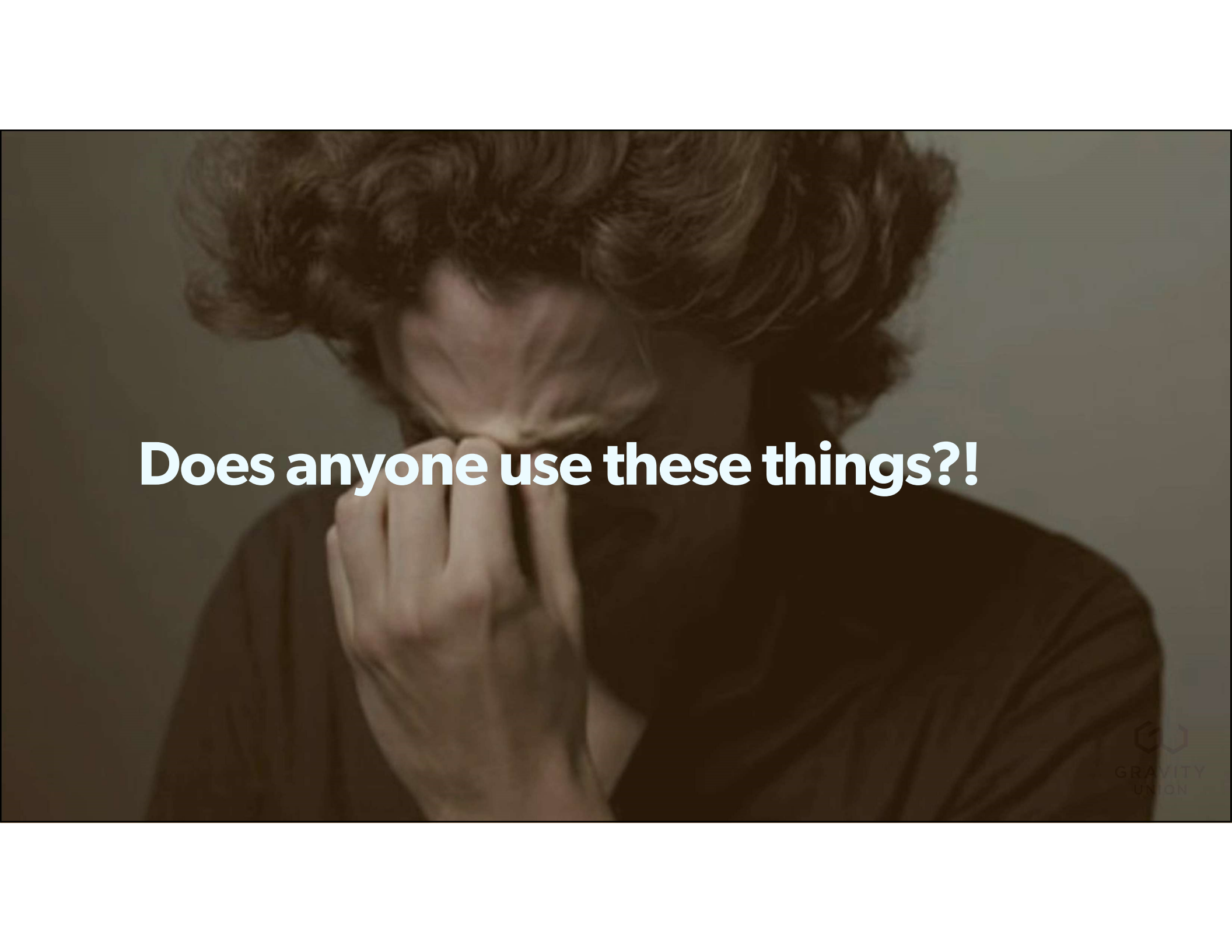
# Guiding principles

1. A living document
2. Focus on outcomes, not features
3. You're never done
4. A technology and change management mindset
5. Enable-first approach



# Aside:

My roadmap crisis!

A person with curly hair is shown from the chest up, covering their face with their hands. They appear to be in a state of distress or discomfort. The background is a plain, light-colored wall. The overall tone of the image is somber and contemplative.

**Does anyone use these things?!**

# The goal is not to implement everything

- ✓ It's to give people a guide/map and they can choose their destinations over time.
- ✓ You will have more certainty with anything that is 1-2 quarters out.

# A product roadmap example

| Themes & Initiatives            | Epics   | Status      | Time horizon | Priority | Confidence |
|---------------------------------|---|-------------|--------------|----------|------------|
| <b>A. EASY ONBOARDING</b>       |   |             |              |          |            |
| <b>A1. Effortless setup</b>     |   |             |              |          |            |
|                                 | Fast and installation requiring minimal input from the user | In Progress | H1           | Critical | High       |
|                                 | Product is ready for use out of the box                     | Planned     | H1           | High     | Medium     |
| <b>A2. Low migration effort</b> |   |             |              |          |            |
|                                 | Compatibility   | In Progress | H1           | High     | High       |
|                                 | Compatibility   | DONE        | H1           | High     | High       |
|                                 | Seamless import of the existing projects                    | Planned     | H2           | High     | Medium     |
|                                 | Adaptability to various infrastructures                     | New         | H2           | Medium   | Low        |
| <b>A3. Guidance</b>             |   |             |              |          |            |
|                                 | Built-in assistance   | Planned     | H1           | Medium   | Medium     |
|                                 | Tutorials   | Planned     | H2           | Medium   | High       |

Source: [Outcome-driven product roadmap. Many organizations struggle with...](#) |  
 by [Elena Sviridenko](#) | [Product Coalition](#)



100% confident  
(this quarter)

75% confident  
(next quarter)

50% confident  
(next year)

Hot right NOW

NEXT big thing

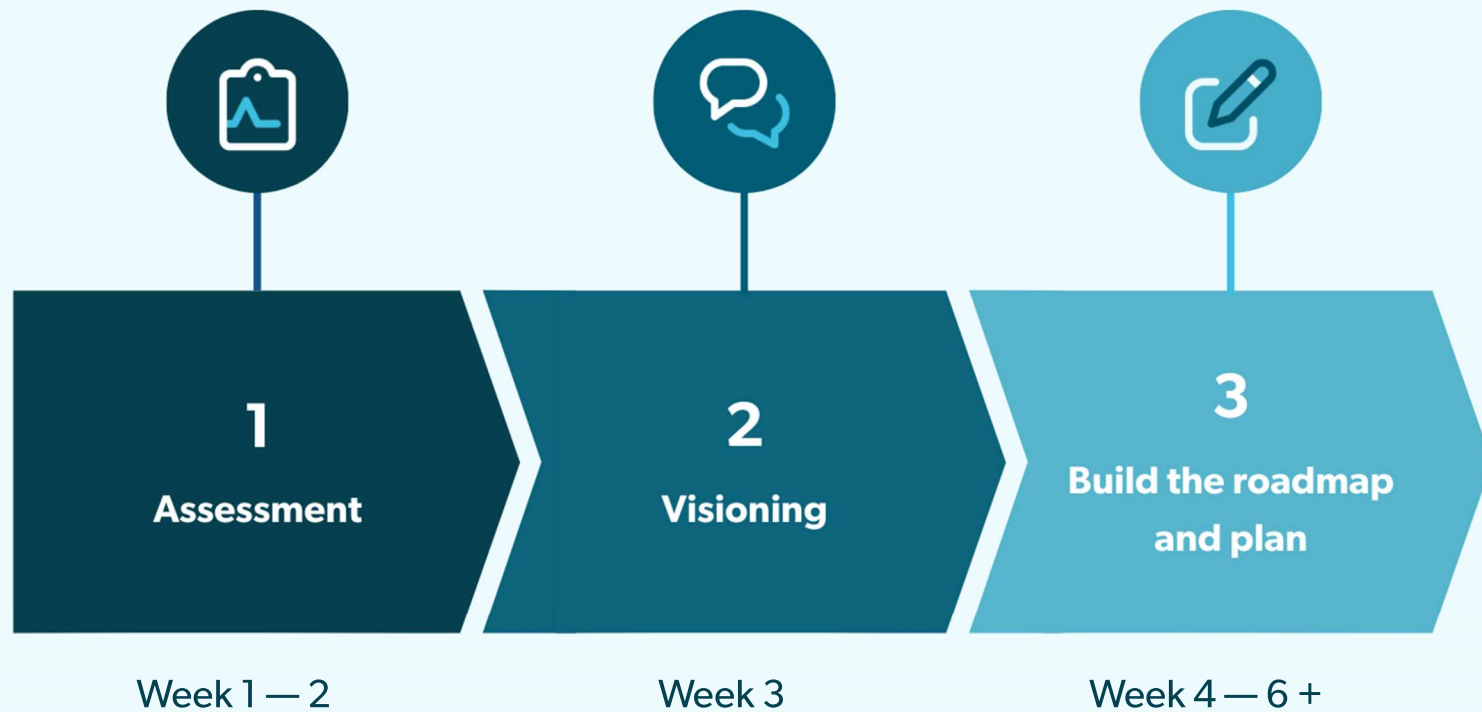
For the FUTURE

|  |   |  |
|--|---|--|
| H1 <u>Implement a new system for customer support</u>  | E1 <u>Roll out new process of interaction with business</u> | E3 <u>Review system</u>                        |
| C1 <u>Implement new UI to CRM</u>                      | A4 <u>Optimize the output and performance</u>               | E3 <u>Review deployment</u>                    |
| G2 <u>Implement CRM integration with other systems</u> | H1 <u>Implement new data backup tool</u>                    | E2 <u>UI Performance improvements</u>          |
| C1 <u>Roll out changes with CRM</u>                    | F1 <u>Implement CRM integration</u>                         | F2 <u>UI</u>                                   |
| D1 <u>Review and improve data backup</u>               | A1 <u>Roll out integration components</u>                   | F2 <u>Review updating</u>                      |
| E2 <u>Review system</u>                                | G3 <u>Introduce reportportal.io</u>                         | F2 <u>Review complete</u>                      |
| E2 <u>Upgrade to Python</u>                            | A2 <u>Review system requirements</u>                        | G3 <u>Optimize the test launch procedures</u>  |
| H1 <u>Review system</u>                                | F1 <u>Review system</u>                                     | G3 <u>Review UI</u>                            |
| G1 <u>UI Review activities</u>                         | F2 <u>Review system</u>                                     | H1 <u>Review process</u>                       |
| A3 <u>Roll out integration components</u>              | G3 <u>Implement CRM integration framework</u>               | A1 <u>Roll out components update</u>           |
|  | A1 <u>Roll out the user-defined components</u>              | A1 <u>Roll out system</u>                      |
|  | A2 <u>Roll out data backup handling</u>                     | A1 <u>Roll out UI</u>                          |
|  | H1 <u>Reviewing</u>   | A2 <u>Roll out integration with output CRM</u> |
|  |   | G3 <u>Optimize the test launch procedures</u>  |
|  |   | G3 <u>Review UI</u>                            |

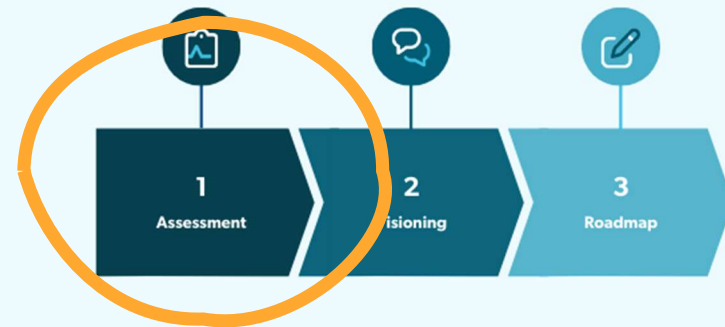
Source: [Outcome-driven product roadmap. Many organizations struggle with...](#) |  
by [Elena Sviridenko](#) | [Product Coalition](#)

# Process

## ROADMAPPING PROCESS



# 1. Assessment



Kickoff

Art of the Possible Briefing

Baseline survey (optional)

Current state interviews with stakeholders and employees



# Art of the Possible Briefing

- ✓ A deeper look at scenarios and demos:
  - ✓ Teamwork and collaboration
  - ✓ Forms and business process
  - ✓ Security and compliance
- ✓ Highlight what's coming out in the *Microsoft 365* roadmap

# Survey

- ✓ Use an online tool
- ✓ Helpful to get a baseline and recruit for interviews
- ✓ Ask about strategy, technology, people and process (stakeholders)
- ✓ Ask about finding information and needs (end-users)

The image shows a screenshot of a survey tool interface. It features two overlapping panels. The top panel is titled 'Section 2' and 'Strategy'. It contains a question: '5. What are the business reasons for your organization to move to Microsoft 365? \*'. Below the question are two checkboxes: 'Reduce capital expenses' and 'Scale to meet geographic or market demands'. The bottom panel is titled 'Section 3' and 'Technology'. It contains a question: '8. What are your top 3 pain points or struggles with technology at your organization? \*'. Below the question is a text input field with the placeholder 'Enter your answer'. At the bottom of the interface, there is a '7 mins' timer and a 'GRAVITY UNION' logo.

# Stakeholder questions

- ✓ What are the business reasons for moving to M365?
- ✓ What applications/systems do you use? Is there an inventory of them?
- ✓ What are your top 3 pain points or struggles with technology at your organization?
- ✓ What are you looking forward to the most with moving to M365?

# Employee input

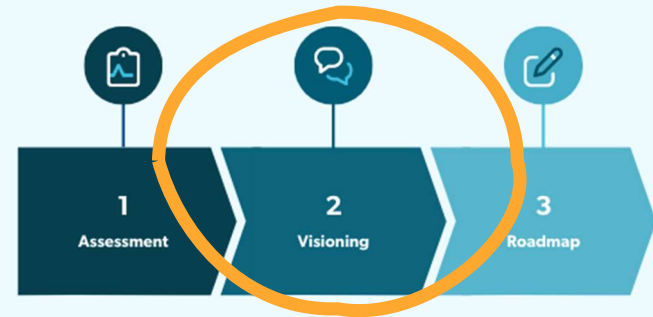
- ✓ Ideally you want employee (end-user) input into the roadmap
- ✓ Use “listening labs” to observe how people work, top challenges, how they search for and save information
- ✓ Ask follow-ups: “show me”, “walk me through how you might...”
- ✓ Remote meeting tools work well for this

# Summarize themes and findings

- ✓ Put together observations into issues/opportunities
- ✓ Use journey maps or personas to add user context

# 2. Visioning activities

Visioning workshop with a mix of stakeholders





# Results

|  |  |  |  |  |  |
|--|--|--|--|--|--|
| IT Teams:<br>Apps with<br>channels for<br>topics | Project<br>teams                                 | Leadership<br>teams (e.g.<br>SR<br>managers) | Community<br>sites e.g.<br>H&S<br>(instead of<br>Yammer) | Help Desk<br>team,<br>sharing<br>how-tos | Managemen<br>t teams for<br>apps /<br>change<br>advisory |
| User groups<br>for apps                          | Committees<br>e.g. Social,<br>H&S,<br>Excellence | Org-chart<br>teams                           | Product<br>community<br>e.g. iphone                      | FOI contact<br>group                     | RM<br>Representat<br>ives                                |
| Facilities                                       | Event<br>based?                                  |  |  |  |  |



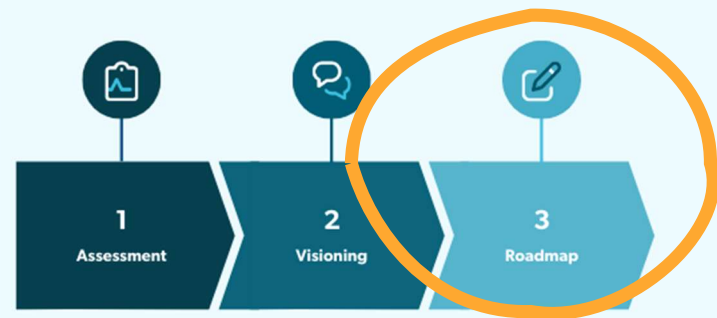
# 3. Build the roadmap

Draft in a presentation, Excel, mindmap, etc.

Iterate

Estimate

Present in different formats for different audiences



**Microsoft 365 has a number  
of dependencies!**

# Technology considerations for roadmap

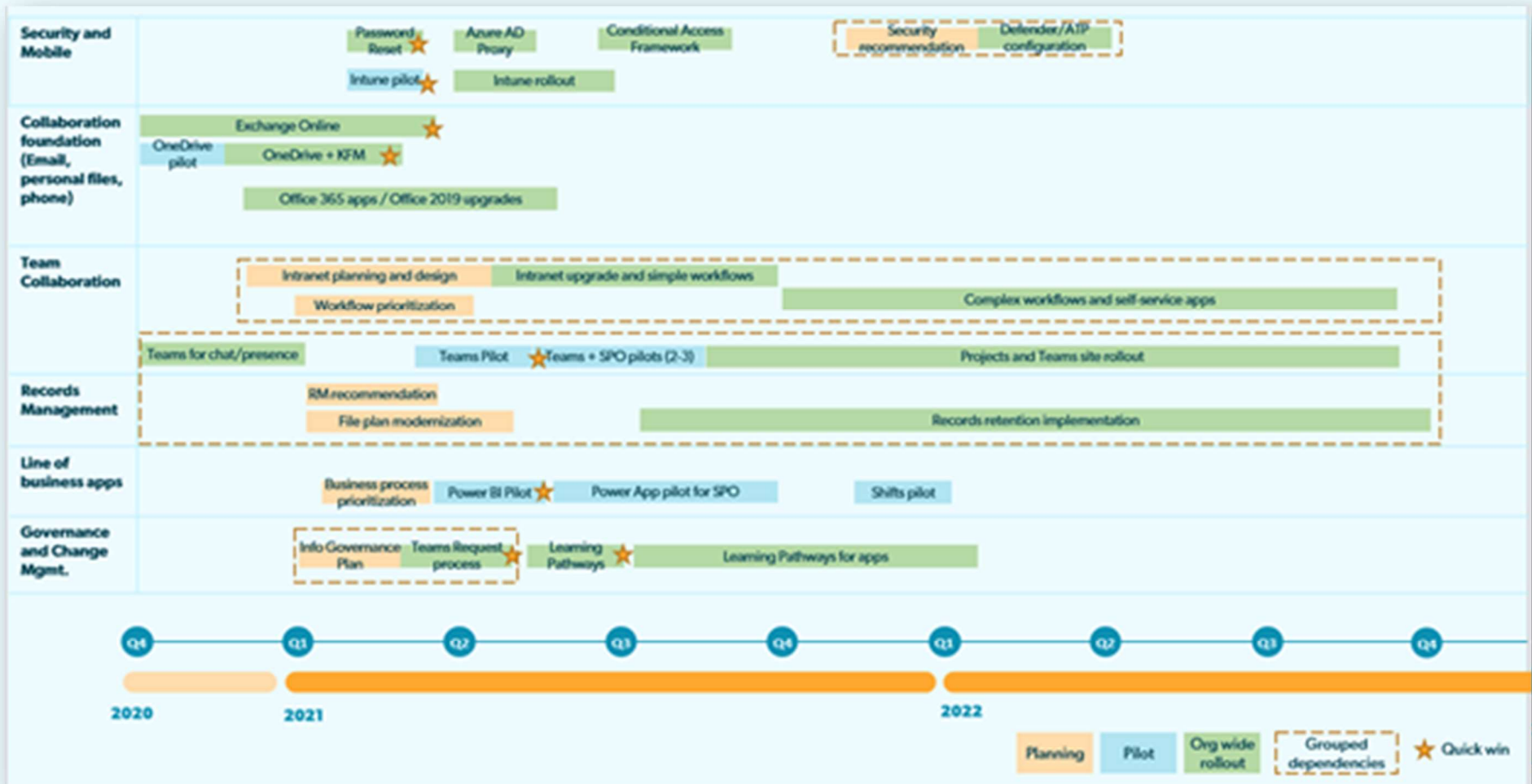
1. Setup identity, enable the Office Apps
2. Migrate mail and move to Exchange Online
3. Set base security posture (Azure AD, sharing links, MFA, ...)
4. Launch Microsoft Teams for meetings and chat, with OneDrive
5. Move content to cloud (SharePoint, Teams, Compliance)

# With Teams, be prepared to manage:

- ✓ Microsoft 365 Groups
- ✓ SharePoint sites
- ✓ OneDrive for Business
- ✓ Mailboxes
- ✓ Stream videos (if enabled)
- ✓ Planner plans (if enabled)

**Do you need to present a  
roadmap in multiple formats?**

# On a timeline...



# By phase...

## Phase 1a: Governance and planning

- Identity setup and migration plan
- Base security posture definition
- Identify pilot groups for cloud collaboration
- Prioritize business processes and workflows

## Phase 1b: Quick wins

- Migrate to cloud email and EXO
- Self-serve password reset
- Device management (Intune)
- Teams + SPO pilot with IT, HR, Finance
- Learning Pathways
- OneDrive communication

## Phase 2+: Strategic projects

- Conditional Access Framework
- Security upgrade
- Employee portal upgrade
- Records management implementation
- Self-service collaboration request (Teams + SPO)

# By confidence...

|                           | Jan – Jun (H1)<br>99% confident   | Jul – Dec (H2)<br>80% confident                                 | Next year<br>50% confident                         |
|---------------------------|---|---|--|
| Security & Infrastructure | Self-service Password Reset<br>Intune rollout                                   | Telephony Recommendation  | Upgrade phone hardware and meeting rooms           |
| Collaboration             | Exchange Online upgrade<br>Teams pilot for HR and IT                            | Teams rollout and training for all staff                        |  |
| Governance and RM         | Collaboration governance plan<br>File plan modernization – planning discussions | Self-service Teams request process and governance rollout       | Classification and labels<br>File plan implemented |
| Business process          |   | Power BI pilot with IT leadership                               |  |
| Training and Change Mgmt  |   | Learning Pathways launch<br>Power Apps training for power users | Phone communication and training                   |



# Estimates

**TEMPLATE**

## Roadmap Initiative Name

Planning project   Pilot   Org wide rollout

**Description:**

|  |   |
|--|---|
| <b>Detailed Activities:</b><br>1)<br>2)<br>3)<br>4)<br>5)  | <b>Resources</b><br><b>Owner / Driver of Initiative</b><br>• Information Technology<br><b>Contributors</b><br>• <b>Department / Stakeholder:</b><br>Description of their role in the project<br>• <b>Consultant Name:</b> Description of their role in the project<br>• Etc<br><b>Skill Sets Required</b><br>• Developers, etc. |
| <b>Outcome:</b><br>Name of key deliverables / outcomes   |   |
| <b>Schedule &amp; Duration:</b><br>Month & Year -> Month & Year<br>Total duration (i.e., 6 months) | <b>Effort:</b><br>Internal Resources:<br>External Resources:  |

GRAVITY UNION

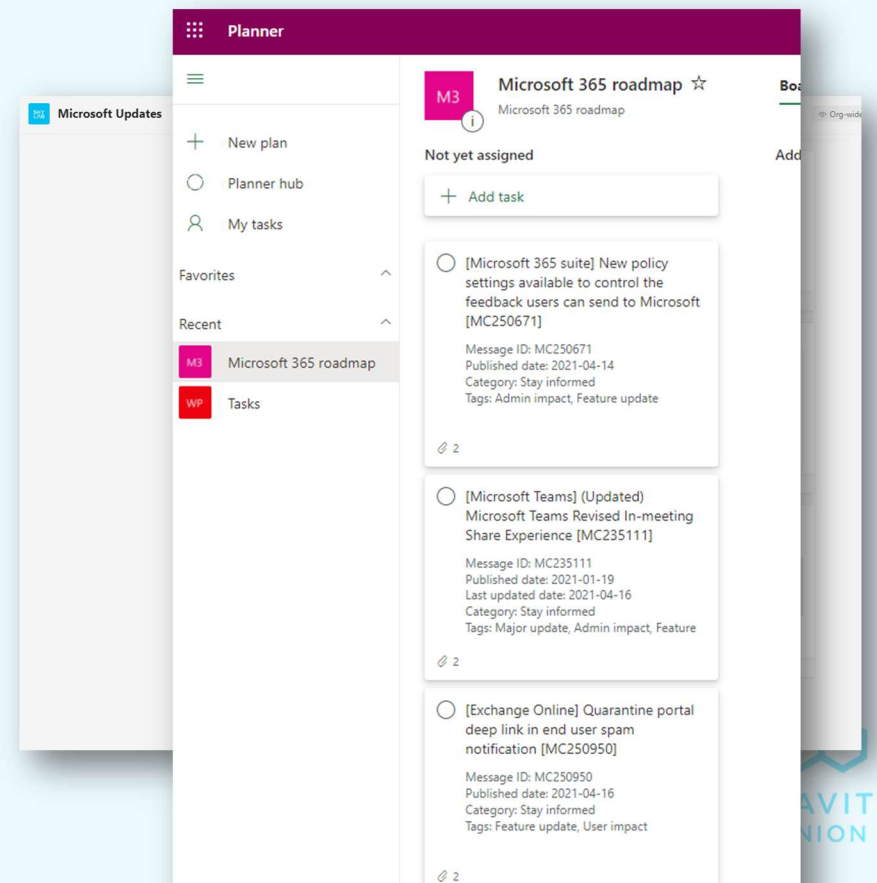
# To recap...



# Evolving the roadmap

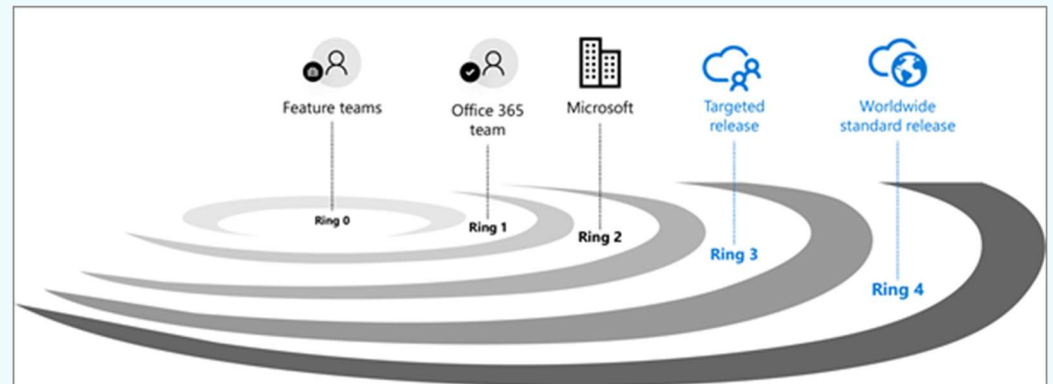
# Stay on top of the Microsoft 365 changes

- ✓ Subscribe to Microsoft 365 roadmap updates (Message center or a public feed such as Office 365 weekly digest)
- ✓ Share these changes with your power users / admins
- ✓ Use Planner connected to the Message Center to assign ownership, due dates, plan for the change



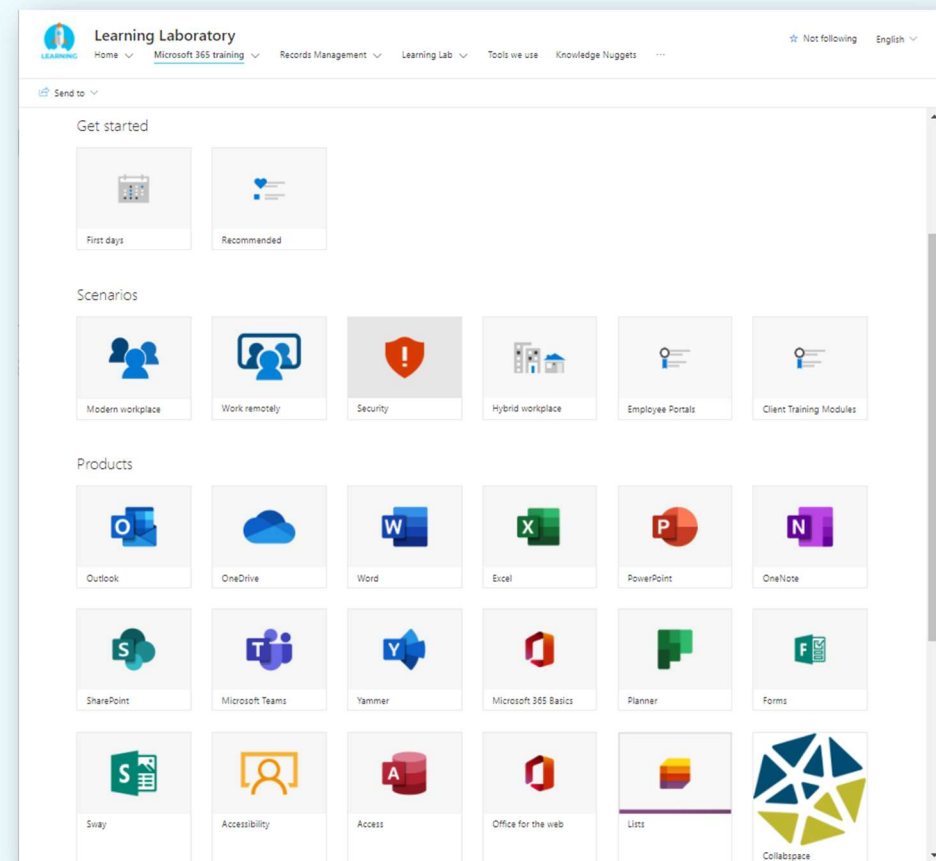
# Preview changes

- ✓ Use Targeted Release for roadmap team or Help Desk to preview what's coming



# Communication and training

- ✓ Involve communications by sharing your roadmap, discussing changes, and adding to your Planner board/project
- ✓ Use Learning Pathways as a starting point for up-to-date training materials
- ✓ Stay tuned for Viva Learning!



# Celebrate wins

- ✓ Do a version that celebrates your wins! Make it part of the regular team rhythms

# Summary



# In summary

- ✓ A roadmap is a living document – expect it to change!
- ✓ Follow the process:
  1. Assessment
  2. Visioning
  3. Build the roadmap
- ✓ Evolve the roadmap by paying attention to Microsoft 365 technical and change management considerations
- ✓ Have fun!

# Learn more

- ✓ Learn more on the blog: [go.gravityunion.com/roadmap](https://go.gravityunion.com/roadmap)
- ✓ [Official Microsoft 365 roadmap](#)
- ✓ Reach out to me for workshop materials:  
[jshukla@gravityunion.com](mailto:jshukla@gravityunion.com)

# Q&A

# Join us at ARMA Canada!

We're giving away one free pass! Winner announced on May 3.

Follow/share/like on LinkedIn or Twitter to enter

<https://go.gravityunion.com/arma-2021>





GRAVITY  
UNION

[www.gravityunion.com](http://www.gravityunion.com)