



Top 10 mistakes in Office 365 digital transformations

...and how to avoid them!

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!

What we'll cover today

- ✓ Introductions
- ✓ Top 10 mistakes with ECM/RM projects

Introductions



Michael Schweitzer

President and CEO

- ✓ 15 years of enterprise technology experience
- ✓ Microsoft and Collabware certified
- ✓ Collabware MVP recipient
- ✓ Finalist, Information Governance Expert of the Year 2017
- ✓ 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

Who we are

Canadian compliance-inspired services firm helping organizations on their digital transformation journey

Gold
Microsoft Partner



Gold Certified
Collabware Partner



Content Services
Partner Program
Charter Member



Industry Expertise

Gravity Union works with organizations across Canada and the US to transform organizations with SharePoint and Microsoft/Office 365 coupled with Collabware CLM, Collabspace or Microsoft 365 Security and Compliance.



Federal and Provincial Governments



Municipal Governments



Healthcare



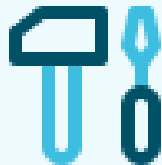
First Nations



Insurance



Energy and Utilities



Engineering and Construction



Banking and Finance



Regulatory Bodies



Transportation



Quick Facts

50+

Years of combined
Collabware
experience

10,000+

Users using our
SharePoint and
Office 365 solutions

40+

Microsoft
certifications

25+

Collabware and
Collabspace projects

10+

Years of average
SharePoint
experience across
our team

18

Collabware Certified
Consultants

50+

Million documents
migrated and
managed in our
solutions

100%

Project success rate

Top 10 mistakes rolling out Office 365 (and what to do about it)

With a focus on SharePoint and ECM

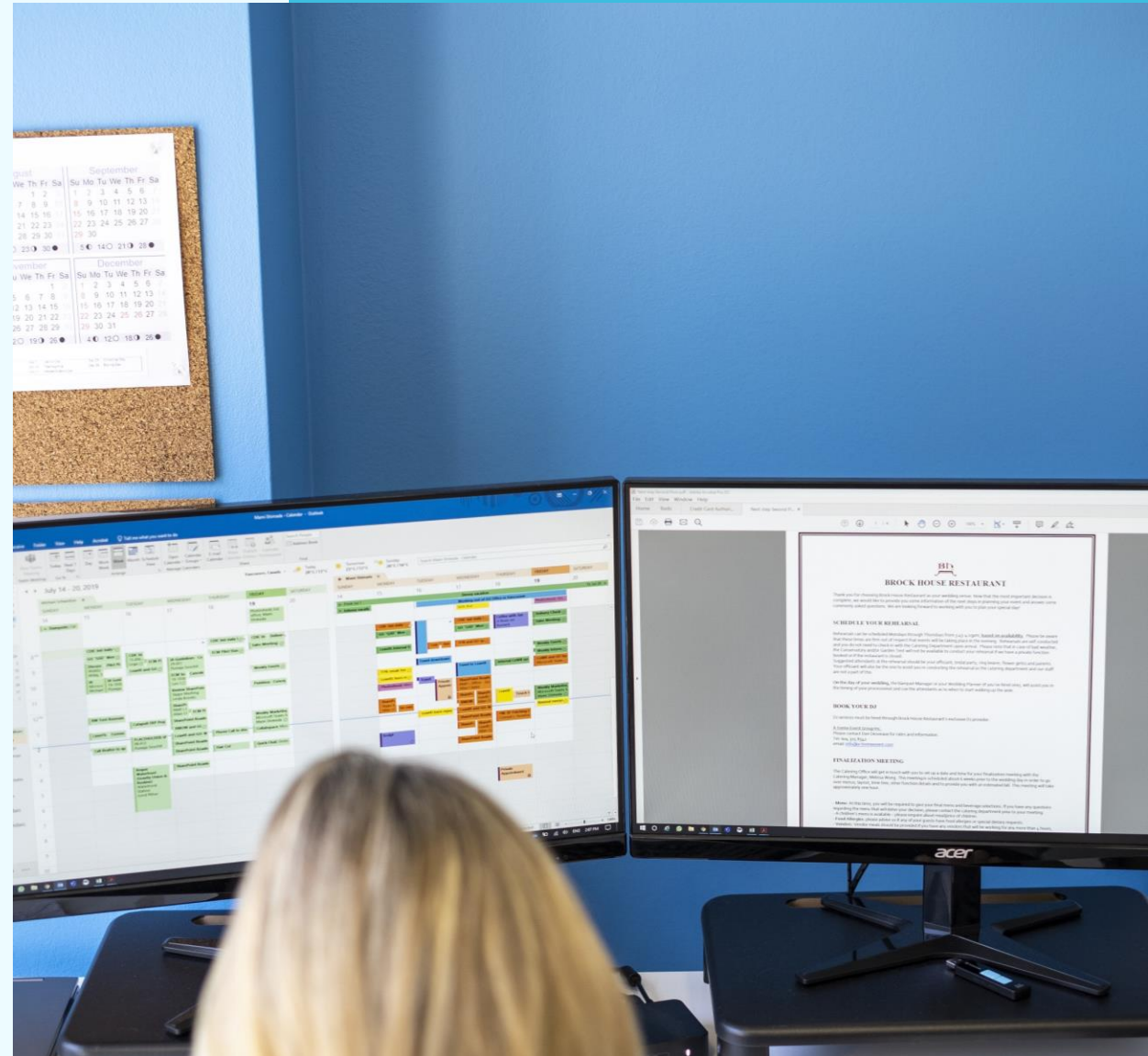
High level overview of Office 365

Just in case you're new

What is Office 365?

Microsoft 365 (previously Office 365) is Microsoft's cloud offering for productivity. It includes (depending on your license)

- Desktop & web versions of the Office Suite (Word, Excel, PowerPoint etc.)
- Azure Active Directory (managing users)
- Exchange
- SharePoint Online
- Microsoft Teams
- Microsoft Planner
- Yammer
- Intune (device management)
- And much more!



1. An arbitrary go-live date

These projects take 18-36 months to do successfully

The problem

- The powers that be want\need\desire to move into the cloud
- An overly aggressive arbitrary go live date is set
- Not enough time is provided to successfully roll out to the organization



“

A **big-bang** deployment of ECM is a sure way to **fail**.

The 'Why' of ECM Failure and the 'How' of ECM Success

<https://www.cmswire.com/cms/information-management/the-why-of-ecm-failure-and-the-how-of-ecm-success-025892.php>

We've heard

80% of organizations we meet for the first time say that their SharePoint implementation needs to be redone

We know

- ✓ The faster the project goes the more big-bang-ish the project becomes
- ✓ The more big-bang the solution becomes
 - The less adopted it will be
 - The less value the solution provides
 - The more likely it will need to be redone
- ✓ It takes longer, but costs less to get it right the first time

Why does this happen?

- ✓ Decision-makers see moving into Office 365 as a win regardless if the underlying solution was completed successfully or provides value.
- ✓ Decision-makers may assume that moving to SharePoint Online\Teams will solve problems they are experiencing with SharePoint on-premises.
- ✓ Lack of understanding of the value of getting it right the first time.

Why it's important

- End user frustration
- Lower\limited ROI
- Re-work and regret spend
- More effort, cost and time to fix after the fact
- Steeper change curve (more difficult to get end user buy-in the second time around)
- Future work is focused on maintenance, clean up, fixing instead of added value



How to address it

- Decision makers need to be informed of the risks and issues
- Create a realistic project plan and use that
- Engage with outside expertise
- Send them a link to this video 😊



2. Dump it in now and we'll fix it later

Placing content in SharePoint & Teams without restructuring the solution for Office 365 and SharePoint Online best practices

The problem

Organizations in their **rush** into the cloud will migrate existing solutions into the cloud without redesigning or refactoring the solution (*especially applicable to SharePoint and Teams*)

Often a result of an **arbitrary end date**



Why does this happen?

1. An overly aggressive timeline
2. Lack of understanding how of SharePoint Online is different than on-premises
3. An assumption that moving to SharePoint Online and Teams will “fix all our problems”
4. Taking a “we’ll fix it later” approach

Why it's important

- End user frustration
- Lower\limited ROI
- Re-work and regret spend
- More effort, cost and time to fix it after the fact
- Steeper change curve (more difficult to get end user buy-in the second time around)
- Future work is focused on maintenance, clean up, fixing instead of added value
- SharePoint is “sticky” and harder to reorganize



Also...

- SharePoint has different **limits** and **thresholds** (example view limit of 5000) i.e. stuff may break
- SharePoint provides a flat information architecture using more site collections and **hub sites**
- There's not a one-to-one mapping of SharePoint classic sites to SharePoint Online modern sites (different web parts, different features)
- Some of your SharePoint workload is better suited for **Microsoft Teams**
- It's **cheaper** and **easier** to get it right the first time and leverage your migration into Office 365 as a vehicle to create a best of breed solution



How to address it

- Ensure you're **designing** and **building** a bespoke solution (don't just give people empty SharePoint sites and Teams and let them fend for themselves).
- Focus on **business value**
- Focus on the **end user experience**

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- Home
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- Blog Posts & E-Books
- Shared with us
- Case Studies
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SKY LAB
Branding
Private group

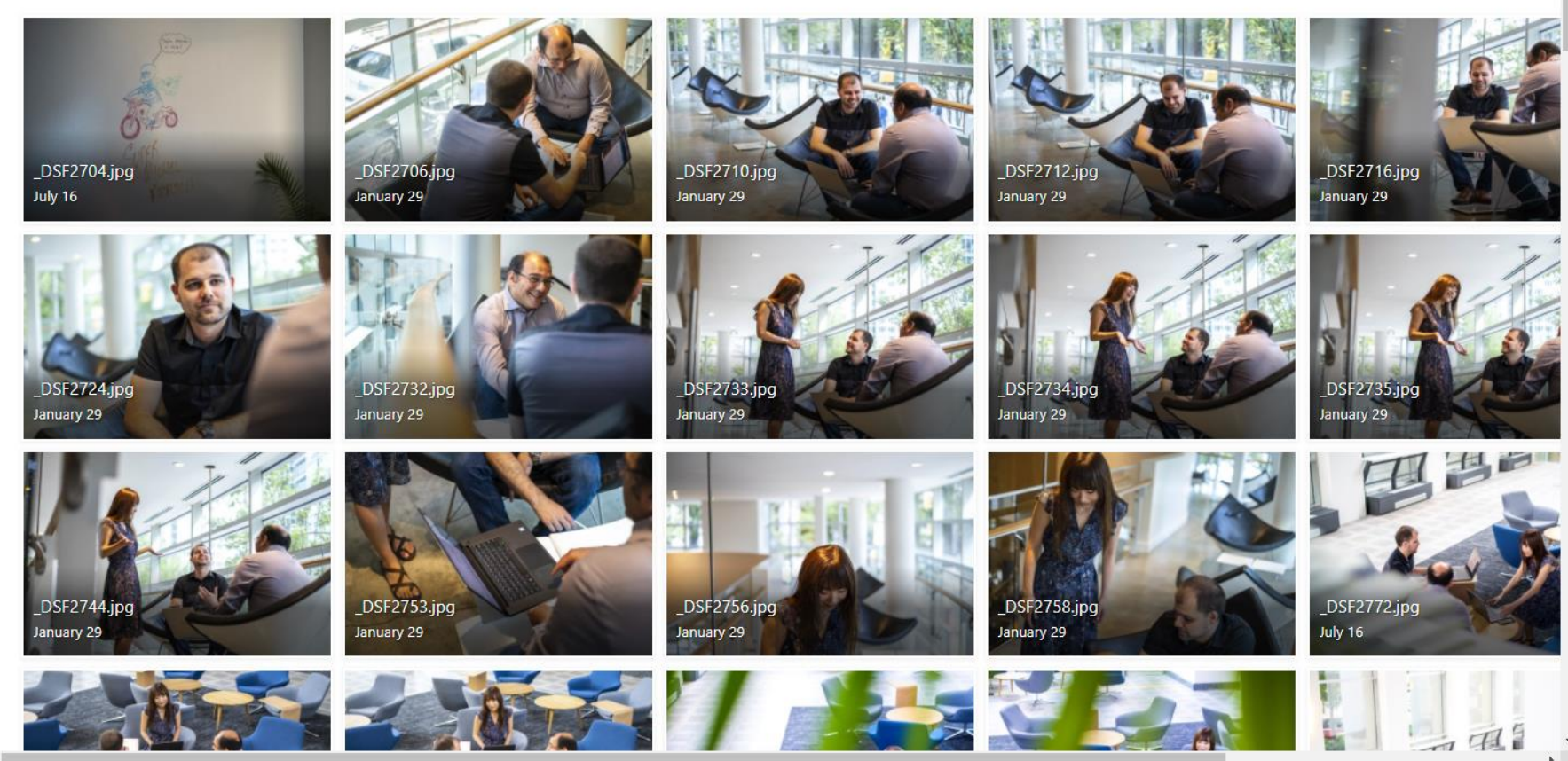
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- Photos**
- Headshots
- Logos & Icons
- Recycle bin

Sync Export to Excel Power Apps Automate

Thumbnails [Filter] [Info] [Share]

Photos



Photos [Close]

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Activity

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Return to classic SharePoint

Applying site design. We're updating your site based on the design you chose. View progress



Martkeing - bad

Private group

1 member

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- Documents
- Site contents
- Shared with us
- Recycle bin
- Edit

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Documents

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Documents

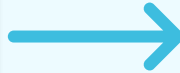
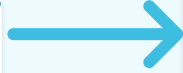
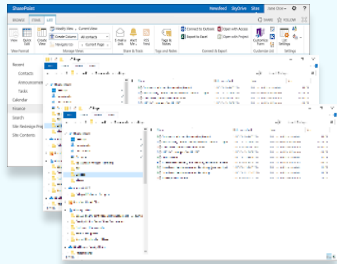
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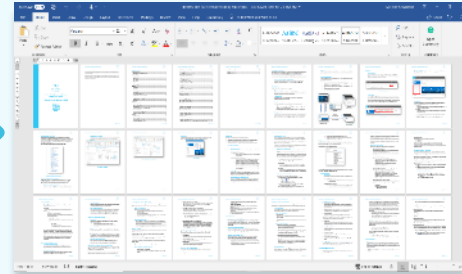
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An overview of our **people focussed** process

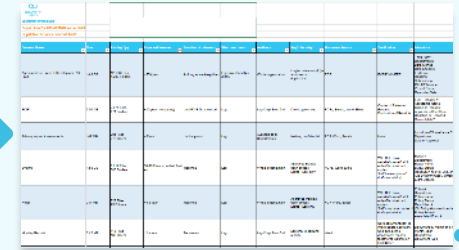
Current state assessment



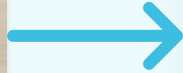
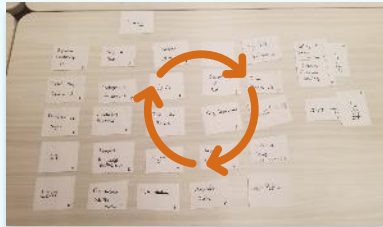
Solution requirements



Content audit



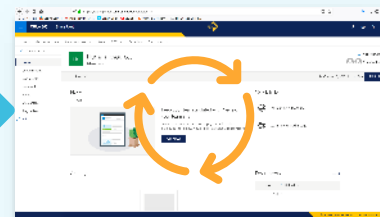
Card sort



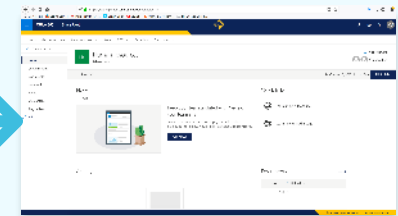
Document and Design



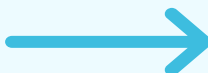
Solution Prototype



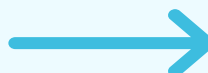
Review and iterate



Migration



Compliance Configuration



Lessons learned



3. Not enough training

Training is more successful over time

The problem

End users are not offered enough initial training for the more complicated platforms like Teams, OneDrive and SharePoint.



Why it's important?

People forget

- 40% of what they learned in 20 minutes
- 77% of what they learned in six days
- 90% after one month

<https://www.worklearning.com/2010/12/14/how-much-do-people-forget/>

In order to drive adoption, people need to be comfortable using the platform



“

**End users only get one
hour of training!**

- CIO

How to address it

- Hands on lecture-lab based training
- Recommend minimum 8 hours in total for end users
- One to two hours per week



Resources

Microsoft Learning Pathways:

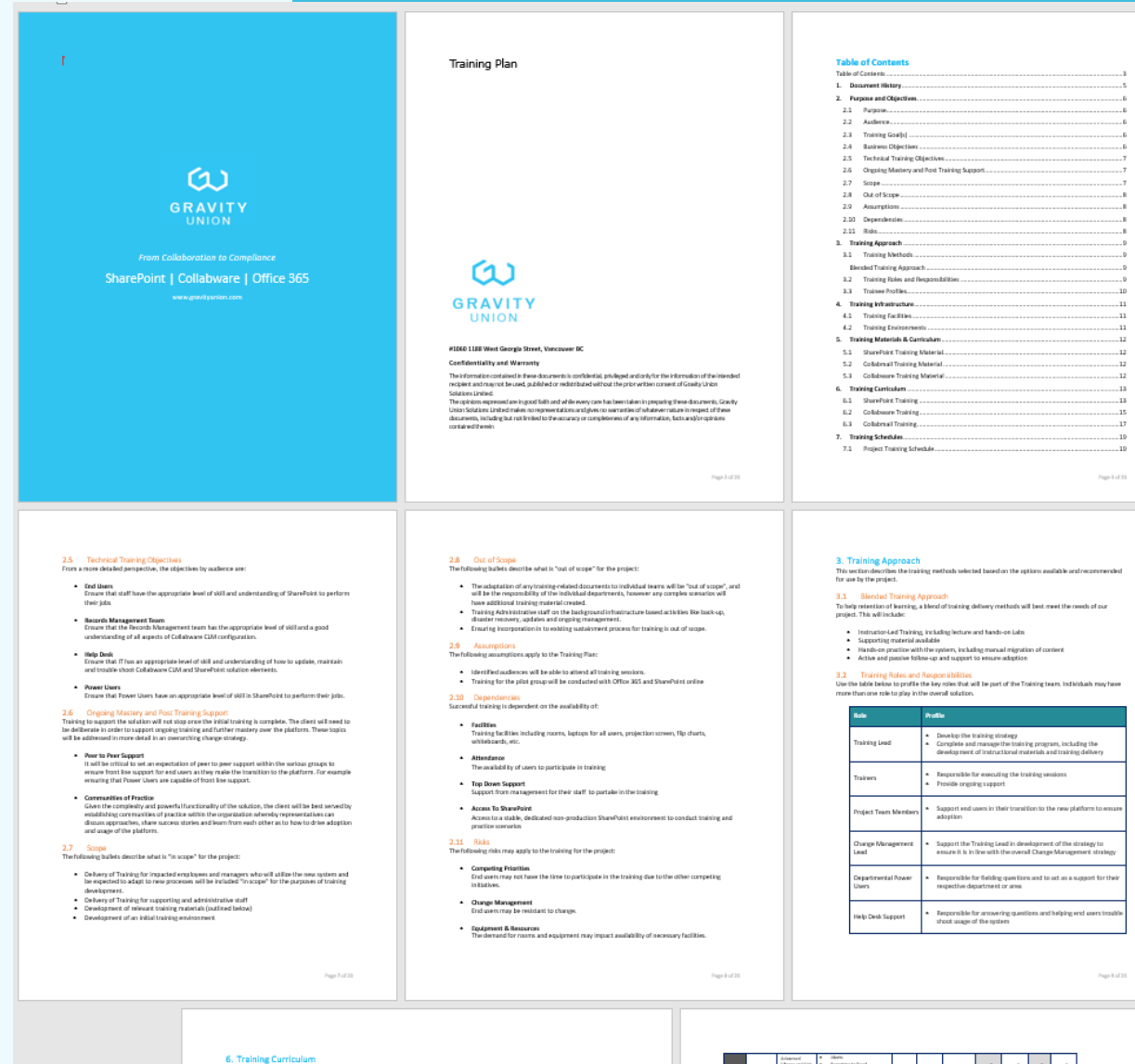
<https://docs.microsoft.com/en-us/office365/customlearning/>

Gravity Union Blog:

<https://www.gravityunion.com/blog/2020/8/learning-pathways>

Gravity Union Training Plan:

contact@gravityunion.com



Filter by title

- Get Started
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 - Setup options for learning pathways
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 - Update learning pathways
 - Manual Setup
 - Explore the Microsoft 365 learning pathways site
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 - Feedback and Support
 - Frequently Asked Questions
- Microsoft 365 learning pathways Early Adopter Program
 - Update Microsoft 365 learning pathways
 - Troubleshooting Microsoft 365 learning pathways

Microsoft 365 learning pathways

09/24/2020 • 2 minutes to read • +2

Microsoft 365 learning pathways is a customizable, on-demand learning solution designed to increase usage and adoption of Microsoft 365 services in your organization.

Important

Learning pathways strives to adhere to a quarterly content update cycle. As of 9/24/2020, we've updated the learning pathways content for our September content update. To learn more about the September 2020 content update, see **Content Updates**. To learn about how content updates are applied and how to manage content them, see **Manage Content Updates**.

On-demand, custom training from Microsoft

Microsoft 365 learning pathways offers:

- **A fully customizable SharePoint Online communication site** - The learning pathways training portal can be customized to add your organization's help, support, and community content
- **Easy provisioning** - Provision learning pathways from the SharePoint Online Provisioning Service with just a few easy steps
- **The ability to create your own training playlists** - with learning pathways, you can create targeted training playlists to meet the unique needs of your environment
- **Up-to-date content** - Learning pathways provides content through a Microsoft online content catalog, so the content at your site is regularly updated

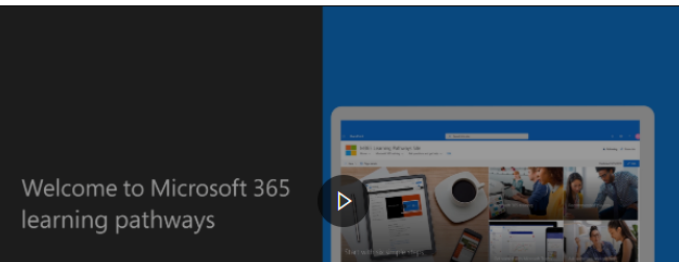
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In this article

- On-demand, custom training from Microsoft**
- SharePoint look book service
- 4 Easy Steps
- Feedback and Support
- Additional Resources

Download PDF



4. Not leveraging technology for its purpose

Each application in Office 365 services a specific purpose, but shares functionality with other applications

The problem

Organizations rush into their Office 365 deployment and do not leverage the various technologies appropriately.



Why does this happen?

Many of the tools in Office 365 have similar functionality and it may be confusing to know what tool to you use for what purpose.



Why it's important?

The various products are designed for a specific purpose.

Using them for their intended purpose will maximize value and ROI

For example, SharePoint and OneDrive both offer document management but SharePoint is more scalable.

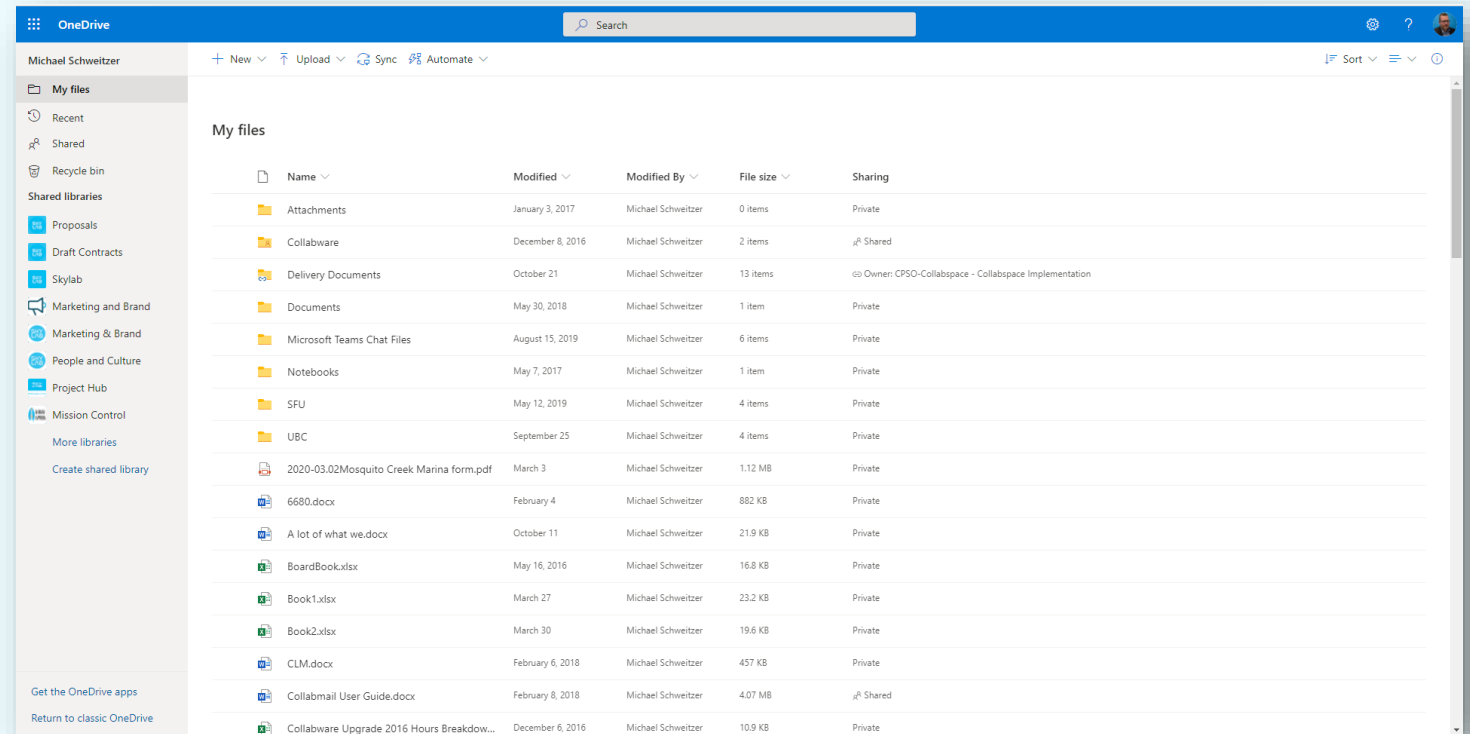


How to address it?

What to use when?

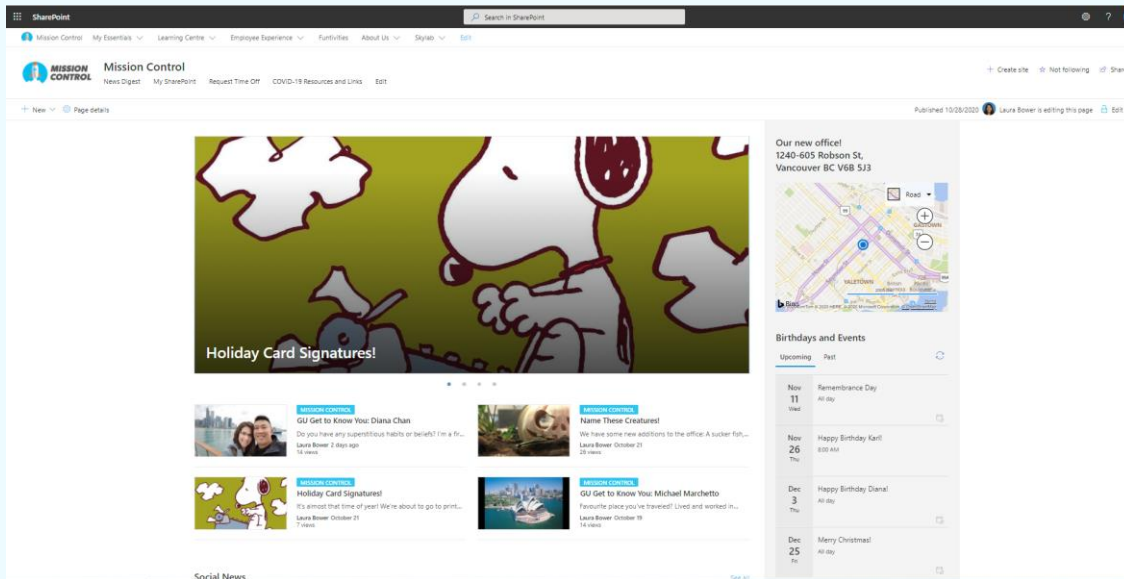
OneDrive

- Personal content
- Should replace personal drives
- If not provided, users will store content on their desktop, Dropbox, personal drives
- If important content ends up in OneDrive, at least it's audited, discoverable, backed up etc.



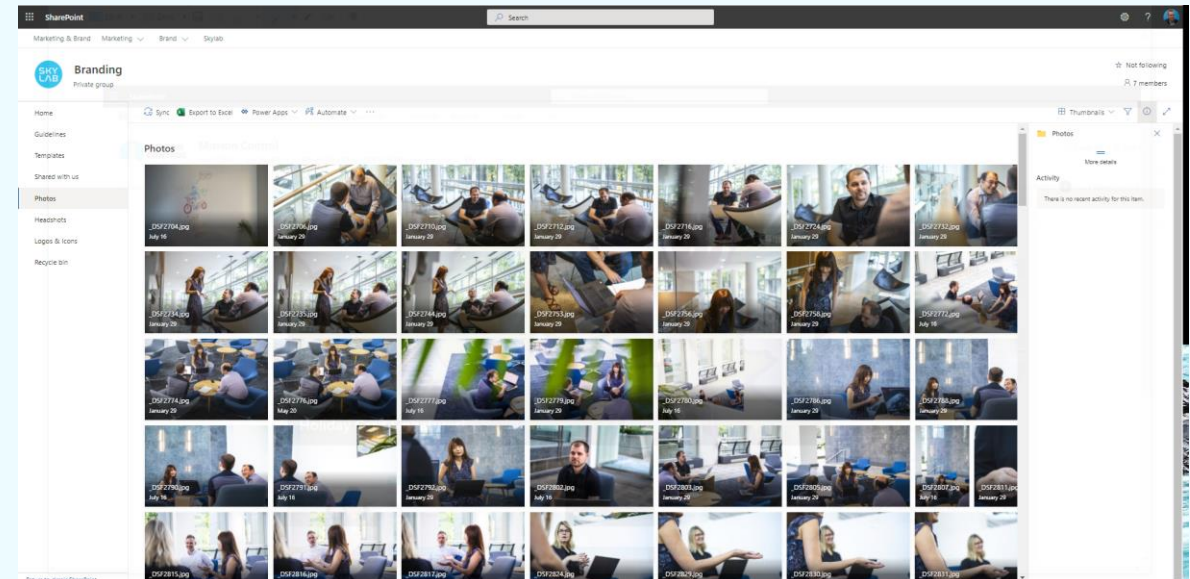
SharePoint

Employee Portals



- News, events, people, employee self-service
- Still build them in SharePoint but can be surfaced in Teams

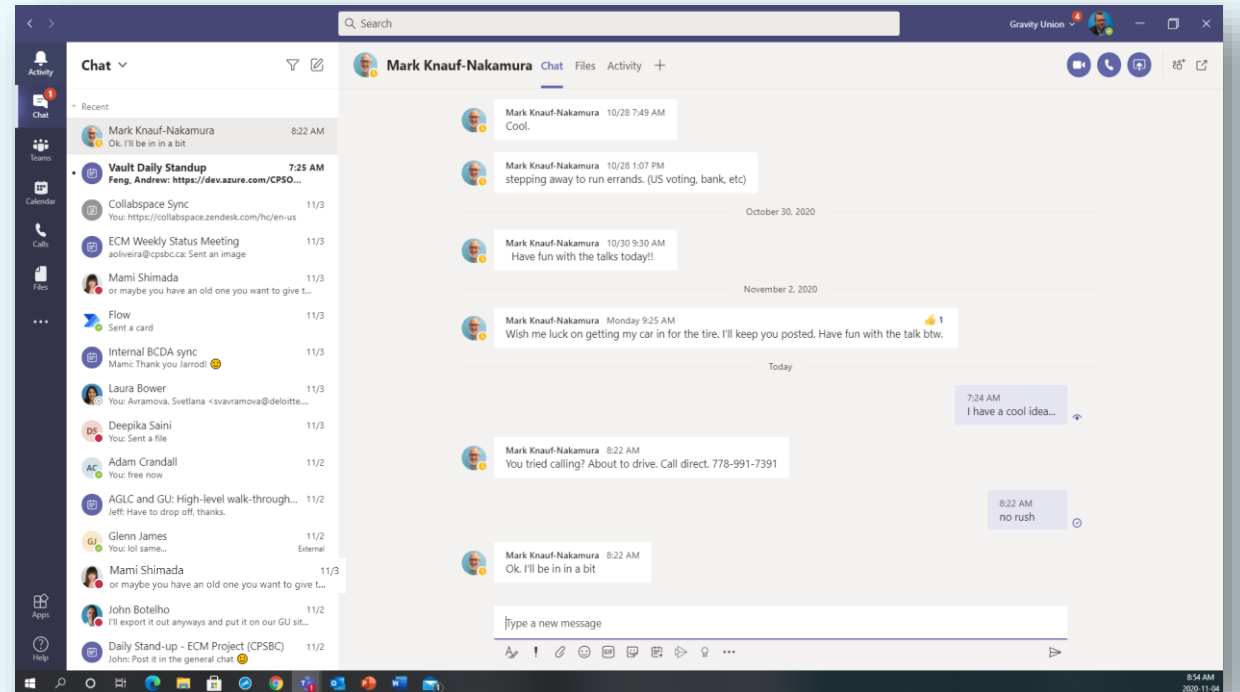
Collaboration Portals



- Enterprise document management
- Large-scale, longer lived content

Teams (not just a Skype replacement)

- Team based **collaboration**
- Chat
- Meetings
- Video and phone calls
- Document Management (SharePoint)
- Slowly becoming the starting point for all collaboration



Teams AND (not vs) SharePoint

Teams is great for :

- Chat, meetings, phone calls **AND**
- Cross functional collaboration like projects, committees, working groups etc.
- Still requires proper SharePoint configuration behind the scenes for document management!

SharePoint is great for

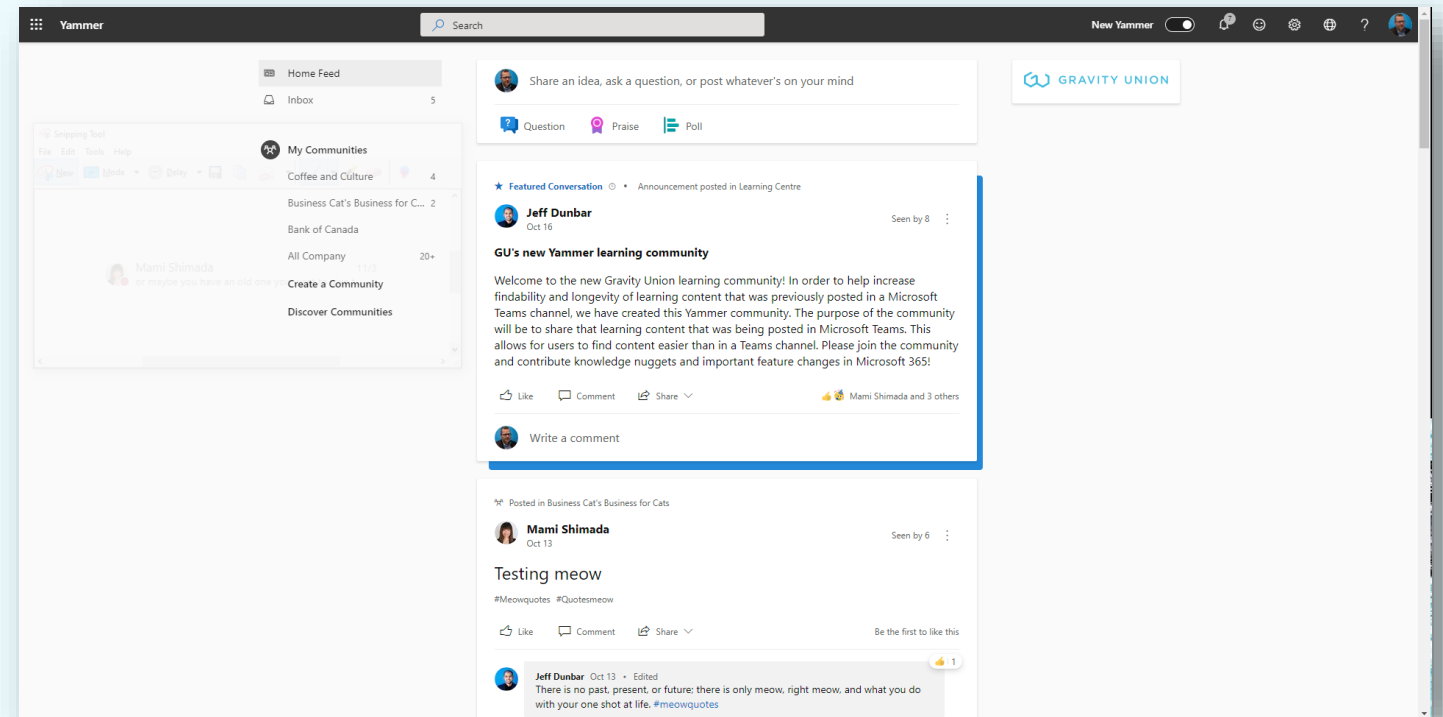
- Employee portals and larger-scale departmental collaboration
- SharePoint solutions can be surfaced in Teams

Note: Teams may become the interface for **all** collaboration (replace SharePoint as a UI) but SharePoint is still the back-end for Document Management.

- Potential decision point to standardize on Teams for the UI or still have SharePoint?
- Still need to do SharePoint configuration
- Limitations in Teams may make this a bit tough at the moment, but it's the direction Microsoft is headed

Yammer

- Enterprise Social (think Facebook for the enterprise)
- Keeps valuable tacit information in conversation form



Yammer vs Teams

Teams

- Temporary, secured and locked down to smaller sets of people
- Supports higher volume of messages
- Immediate notifications\real time collaboration

Yammer

- Tend to be longer lived for the entire organization
- Typically lower volume of messages
- Doesn't need to be as immediate as Teams

Teams may be “good enough” for smaller organizations, but Yammer will provide value for larger organizations to move email conversations into persistent threads

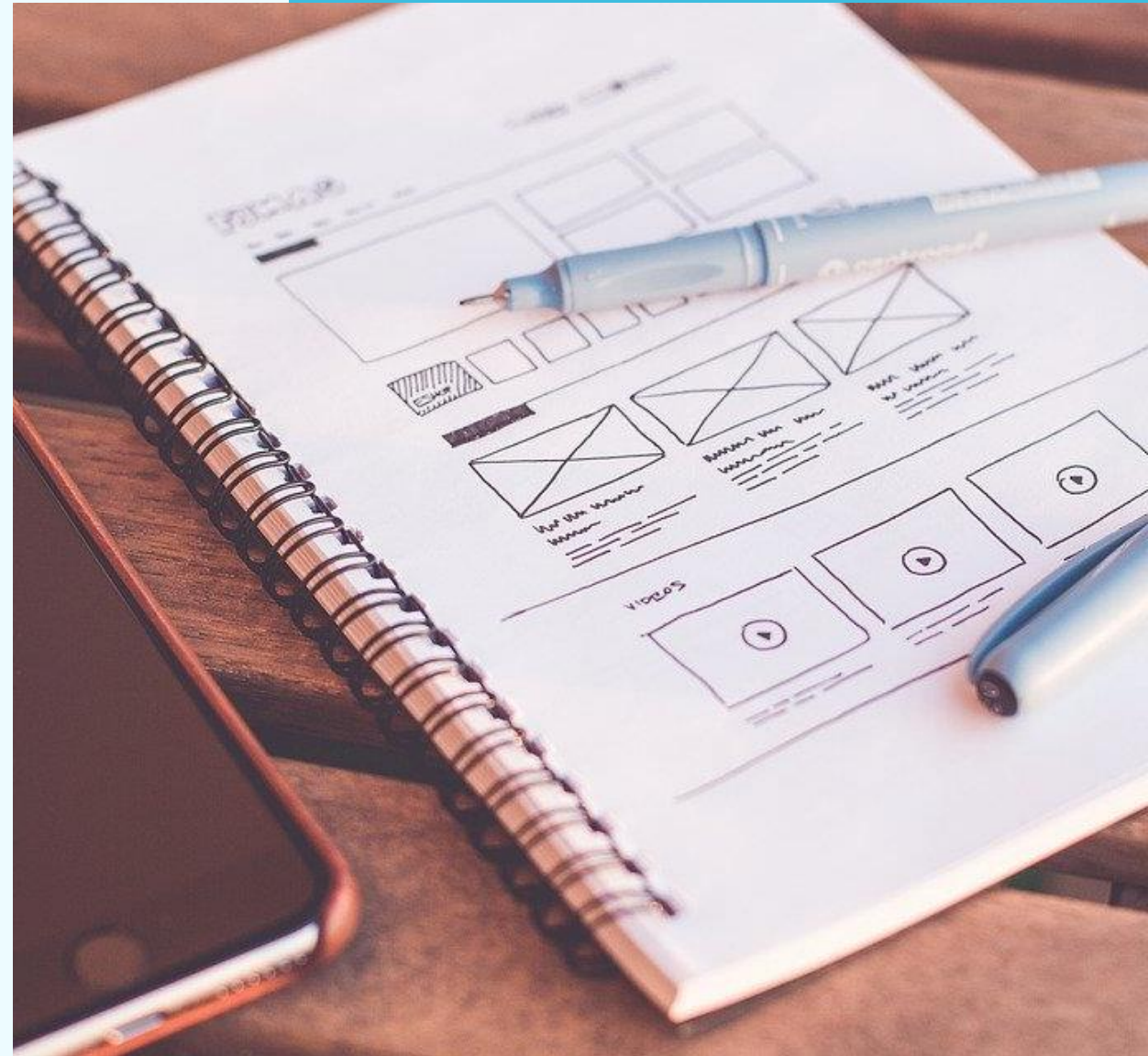
5. Not building a bespoke solution

The more bespoke (custom) the solution, the more ROI for the end user, and the more they will use it

The problem

Organizations roll out Office 365 (SharePoint and Teams) without designing a solution that adds value to the business.

I.e. the business are given Teams and SharePoint sites without any design



Why it's important

- Content is not standardized
- More duplicated content
- Harder to secure
- Hard to manage from a compliance perspective
- Increased maintenance over time
- Minimal business value
- Search is more difficult
- Inability to provide high value-add solutions (workflows etc.)
- Increase compliance risk



How to address it

- ✓ Build specific solutions for specific high value content
 - ✓ Employee files, contracts, invoices, sales, marketing etc.
- ✓ Reuse solutions and templates for an enterprise approach
 - ✓ Projects, meeting minutes, policies and procedures, reference material

Marketing and Brand

Public group ☆ Not following 👤 13 members

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Documents

More details

Activity

There is no recent activity for this item.

6. Rolling out by technology vs. rolling out by business area

Office 365 is meant to work together

The problem

Many organizations purchase Office 365 and then turn off functionality like OneDrive or SharePoint in Teams etc.



Why it's important

- Office 365 was designed as an interconnected suite of applications that work together
- Many of the applications have dependencies, for example:
 - SharePoint relies on OneDrive for explorer view, file synchronization
 - Teams relies on SharePoint for document storage

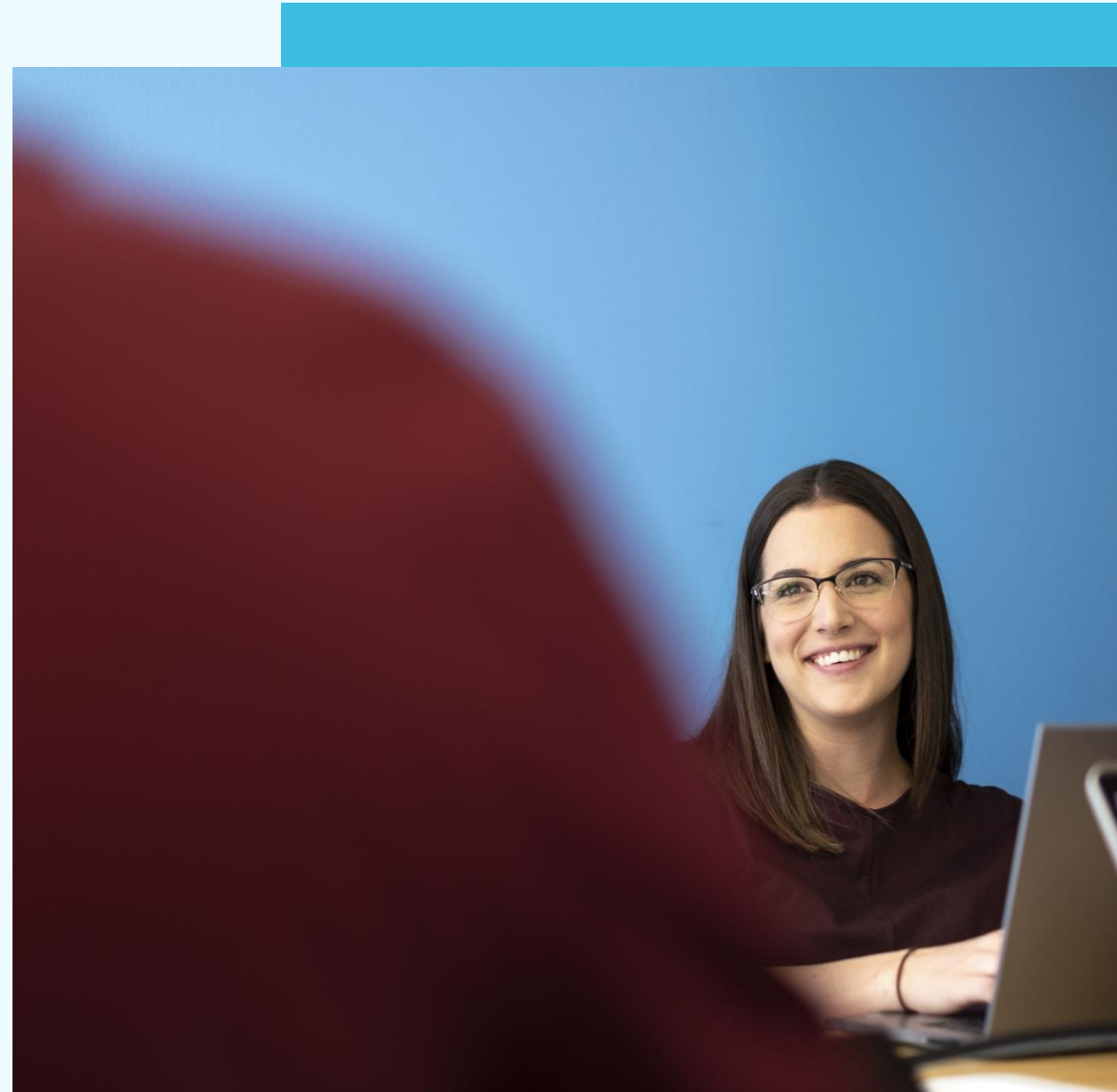


How to address it

- Don't turn off anything!
- Govern the creation of Teams and SharePoint sites

Start with

- Azure AD and Exchange Online
- OneDrive for everyone
- Teams for everyone (focus on projects etc.)
- Roll out Departmental Teams and Departmental SharePoint sites



7. Too much process

The need to be lean and agile



GRAVITY
UNION

The problem

Many organizations treat Office 365 like software development projects and introduce lots of process and red tape



Why does this happen?

- Large-scale SharePoint projects used to be managed like software projects (cause they were!)
 - Required lots of customizations
 - Had multiple environments
 - Projects were expensive and time consuming
 - The risk of making mistakes was high and costly
 - The risk related to custom code was managed through process and rigor
- Organizations bring this mindset into SharePoint Online

Why does this happen?

But...

- SharePoint Online (and most of Office 365) typically requires little to no customization
- SharePoint Online typically does not have test and development environments
- The **risk** of making mistakes is **low** and the cost is minimal (especially when following best practices)

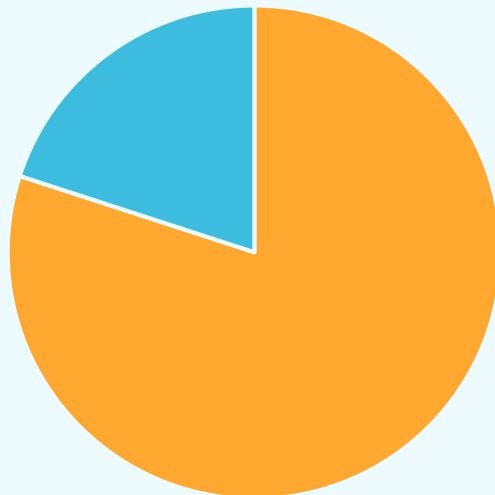
Why it's important

- Office 365 updates occur at a fast pace
- Organizations need to adapt quickly to the change in technology
- Organizations will get more value out of SharePoint Online by being lean and agile



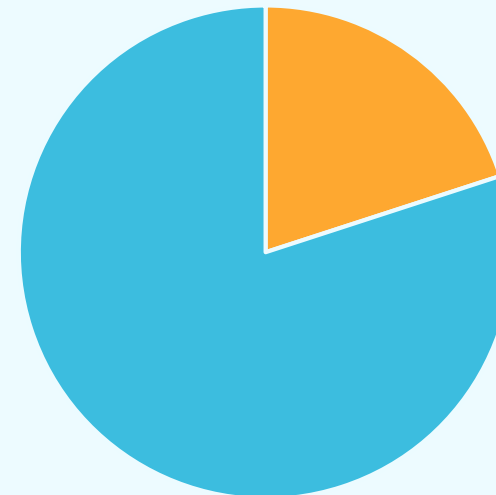
Where should our effort go?

High Process Driven



■ Process ■ Solution

Lean\Agile Driven



■ Process ■ Solution

How to address it

- Focus on a lean and agile process
- Focus on prototypes, iterations and end user engagement instead of documentation, approvals
- Leverage configuration instead of code or scripts when possible

8. Not understanding limits

Everything has its limits, even Office 365!

The problem

SharePoint Online and Office 365 impose many limits that used to be thresholds (could be configured) in SharePoint on-premises



Why it's important

- Office 365 imposes many limits that you do not have control over
- Limits may derail a project if not taken into account
- Limits will influence the design of the solution



Examples

- View threshold – is now a 5000-item limit
- 400-character limit in URL's
- 1 TB/day limit for migration
- API call limits (e.g. each Power Automate flow gets 15,000 API calls per 24 hours)
- Maximum number of concurrent Power Automate flows is 600

*Note: these constantly change and will vary by license

Limits often change by license

Maximum number of Power Automate flows in each month:

- Free - 750
- Flow for Office 365 - 2000
- Flow Plan 1 - 4500
- Flow Plan 2 - 15000

How to address it

- Do your research and understand the limitations that apply to your licensing schema
- Ensure to take limits into account in your solution design and project plan

9. Not right-sizing governance

Less governance is required in Office 365 and more governance can be automated and facilitated by the platform

The problem

Often times Office 365, especially SharePoint Online, is over-governed through centralized IT.

This is carry over from "how things have always been done."



Why it's important

- Office 365 provides mechanisms to decentralize control
- Office 365 also provides mechanisms to automate governance
- Over-governing the solution can slow down adoption or encourage people to store content outside the system.



How to address it

- Automate governance when possible
- Make governing as frictionless as possible
- Decentralize management when appropriate
- Ensure timely response to requests that require governance
- Ensure you have resources dedicated to the ongoing improvement and updates of the platform

Examples

- Take an open-by-default and closed-by-exception rule
- Turn off external sharing for sensitive areas (e.g. the HR SharePoint site)
- Create templates for SharePoint sites and Teams and allow end users to create them
- Allow end users to share content in low risk sites like “Christmas party planning”
- When governance is required (say approval for site creation) ensure timely SLA’s of 24 hours or less

Project Hub

Projects Clients Edit

+ Create site ☆ Not following ↗ Share

+ New ⌵ ⚙ Page details

Published 9/8/2020 ✎ Edit

Projects

See all

+ New ⌵ 📄 Edit in grid view ↗ Share 📄 Export to Excel

☰ Active Projects ⌵ ⌚

Client ⌵	Project Name ⌵	Site URL ⌵	Project Type ⌵	PM ⌵	% Complete ⌵	Schedule Sta
[Image]	Employee Portal	- SP2019 Modernization	Delivery - Enterprise	Mami Shimada	25%	✓ Green
[Image]	MERA Discovery	https://gravityunion.sh...	Delivery - Small	Mami Shimada	10%	✓ Green
[Image]	SharePoint O365 ECM	https://gravityunion.sh...	Delivery - Small	Michael Schweitzer	20%	✓ Green
[Image]	IT Support	IT Support	Sustainment / Support	Michael Schweitzer	0%	✓ Green
[Image]	KNIS	KNIS	Delivery - Enterprise	Mami Shimada	67%	✓ Green
[Image]	SharePoint Document Management Solution	https://gravityunion.sh...	Delivery - Enterprise	Mami Shimada	1%	✓ Green

Create a New Project
Click Here

Create a New Client
Click Here

My Projects News

See all

+ Add ⌵

[Image] and CollabSpace Rollout
This is the site we will keep, Jeff deleted the other ones

August 18

[Image] LM Cleanup
GU SP Bloc [Image]

March 30

[Image] ePoint Records...

Save Cancel

New item

* Project Prefix

* Project Name

Note: Project Prefix and Project Name are used to create site urls in format Prefix-ProjectName eg. 'GU-SampleProject'. Spaces will be removed during provisioning process.

Client

* Project Type

* PM

GU Team

Notes

Create Site Yes

Leave Request Approval for Diana Chan - Message (HTML)

File Message Help Tell me what you want to do

Ignore Delete Archive Reply Reply All Forward IM More

McAfee Anti-Sp... To Manager
Team Email Done
Reply & Delete Create New

Move OneNote
Assign Policy Unread
Mark Categorize Follow Up
Translate Find Related Select
Read Aloud Zoom Report Message
Dynamics 365 Insights Customer Manager

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Tue 2020-11-03 12:51 PM

Approvals | Power Automate

Leave Request Approval for Diana Chan

Created by Sophie Ke <ske@gravityunion.com>

Requested for **Diana Chan** <dchan@gravityunion.com>

Date Created Tuesday, November 3, 2020 8:51 PM GMT

Link [Diana - AB](#)



Please approve Diana Chan's leave request:


- **Title:** Diana - AB
- **Start Time:** Friday, November 6, 2020 12:00:00 AM
- **End Time:** Monday, November 9, 2020 12:00:00 AM
- **Leave Type:** Vacation

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Tue 2020-11-03 12:51 PM

 Approvals |  Power Automate

Leave Request Approval for Diana Chan

Created by Sophie Ke <ske@gravityunion.com>

Requested for **Diana Chan** <dchan@gravityunion.com>

Date Created Tuesday, November 3, 2020 8:51 PM GMT
Link [Diana - AB](#)

Please approve Diana Chan's leave request:

- **Title:** Diana - AB
- **Start Time:** Friday, November 6, 2020 12:00:00 AM
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Thank you.

Comments

Enter comments

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10. No strategic departmental ordering

Don't take a technology approach, plan the roll-out in a way that builds on success



The problem

Organizations don't roll out to the various groups in a **strategic** fashion. They may choose more risky groups to work with first, which may be seen as less successful.

Risky groups are:

- Overly complex
- Don't have the time
- Are going through change fatigue
- Have a bad attitude (cultural issues)
- Don't have top-down management support
- Dislike SharePoint



How to address it

Start with groups that are:

- Small
- Low complexity (organization, security, integrations)
- Low volume of content
- Have proper top-down support
- Willing to engage
- Have the time to engage
- Will make great internal case studies to influence others

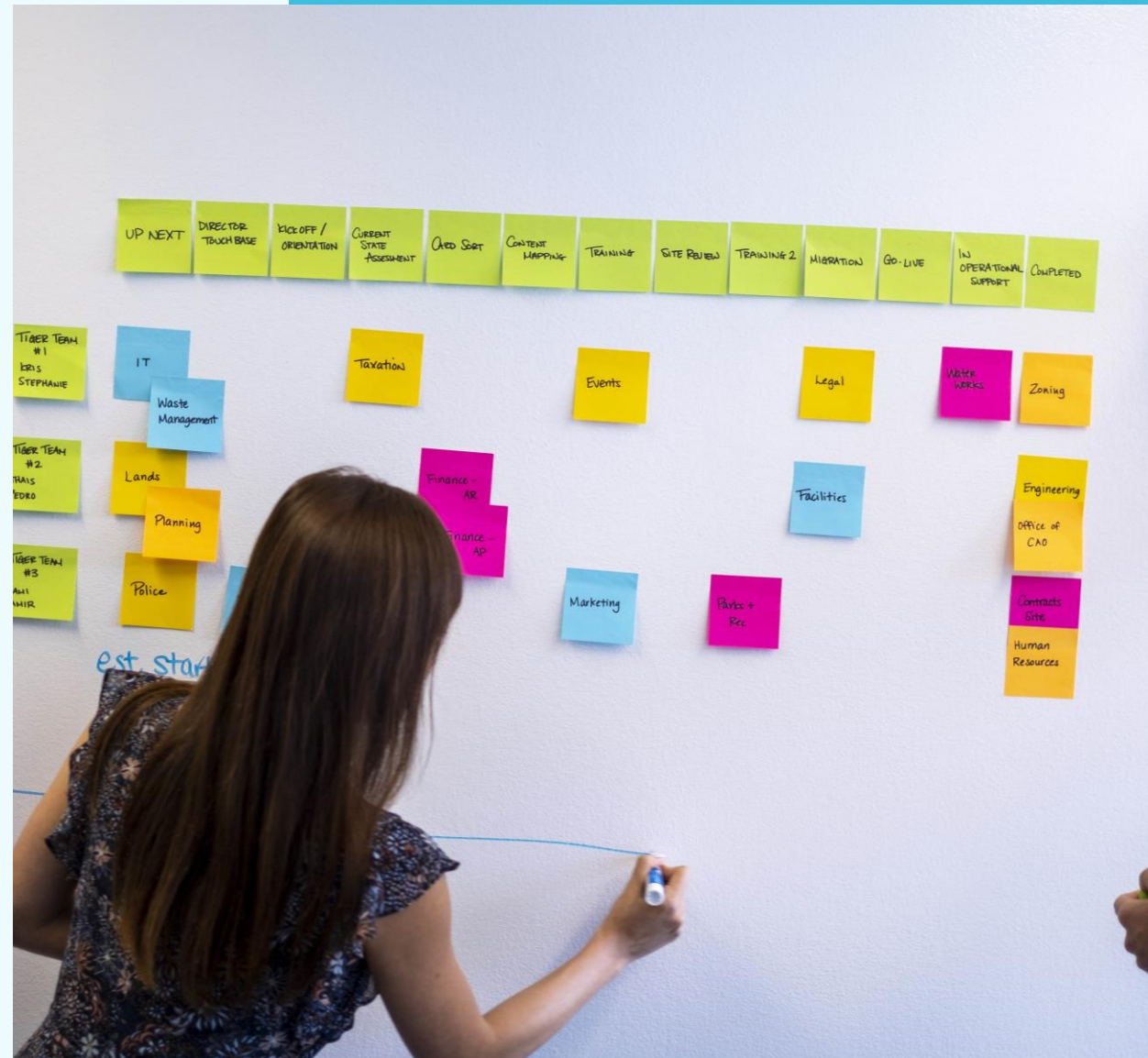
How to address it

End with groups that are:

- Large
- High complexity (organization, security, integrations)
- High volume of content
- Less management support
- Less willing to engage
- Are too busy to engage

Why it's important

- ✓ Less-than-perfect implementations will cause hesitation downstream
- ✓ Successful implementations will motivate others to join in
- ✓ Building on your success is a great change tool and helps avoid executive support fatigue
- ✓ Team becomes more capable
- ✓ More pre-made solutions can be provided to complex groups downstream
- ✓ Success stories influence downstream decision-makers



Strategic roadmap

			Corporate Services					Customer Service					
			HR	BS	Log	RA	SPR	IT	Metering	Billing	CC	Credit	Retailer
Risks	Readiness	Current State Awareness	0	2	3	3	3	0	0	0	3	2	3
		Stakeholder Engagement	0	3	3	1	2	3	3	1	2	1	3
		Learning Development	0	2	3	1	2	2	3	1	2	1	1
	Capacity	Organizational and Environmental Considerations	0	1	2	1	2	1	2	1	3	3	3
	Willingness to Engage	Culture and Sustainability	0	1	2	2	2	1	2	2	1	1	2
		Leadership Alignment	0	3	3	2	2	3	3	2	0	1	2
	Complexity	Content Volume Status	1	1	2	1	1	1	2	1	2	1	2
		Content Quality Status	2	2	2	1	1	2	2	1	2	2	2
		Content Source Status	0	1	2	2	1	1	2	2	1	1	2
		Customizations Requirements	0	1	2	1	3	1	2	1	1	1	2
		Metadata Status	0	3	0	1	2	1	0	1	2	1	1
		Security Status	0	3	1	3	1	3	1	3	3	1	2
		Physical Objects Status	0	1	1	1	3	1	3	1	3	1	3
	Organizational Considerations	Size	1	2	3	3	3	2	2	1	1	2	1
		Location	3	2	3	3	1	3	2	3	3	3	3
		Number of Sub-Functions	1	1	1	2	1	3	2	3	2	2	2
	Additional Risks	Completion of Assessment	-10	-5	-7.5	0	-5	-10	-10	-10	-7.5	0	0
		Additional Risk	0	0	0	0	0	-10		0	0	0	0
Total			-5.81	13.10	16.52	18.86	16.10	-1.14	12.93	7.19	13.33	20.29	25.33
Benefits	People Impact	Size of Group	1	2	2	3	3	2	2	1	1	2	1
	Financial Impact	Risk Mitigation	2	3	2	2	3	3	2	2	2	3	1
		Value to Business	3	3	3	2	2	3	3	1	1	3	2
Total			5	6	5	4	5	6	5	3	3	6	3
Risk Rating			0.00	0.61	0.72	0.79	0.70	0.15	0.60	0.42	0.61	0.84	1.00
Benefits Rating			0.67	1.00	0.67	0.33	0.67	1.00	0.67	0.00	0.00	1.00	0.00



Strategic roadmap

- ✓ Work our way from the least risky groups through to more risky groups (bigger, complex content, less availability, less capacity to engage)
- ✓ Benefits are:
 - ✓ Team becomes more capable
 - ✓ More pre-made solutions
 - ✓ Success stories influence downstream decision-makers



Stay on top of it!

Resources

Microsoft 365 Roadmap:

<https://www.microsoft.com/en-us/microsoft-365/roadmap?filters=>

SharePoint Limitations

<https://docs.microsoft.com/en-us/office365/servicedescriptions/sharepoint-online-service-description/sharepoint-online-limits>

The Intrazone (Microsoft Podcast)

<https://techcommunity.microsoft.com/t5/microsoft-sharepoint-blog/the-intrazone-a-new-sharepoint-podcast-from-microsoft/ba-p/184910>

Gravity Union Blog

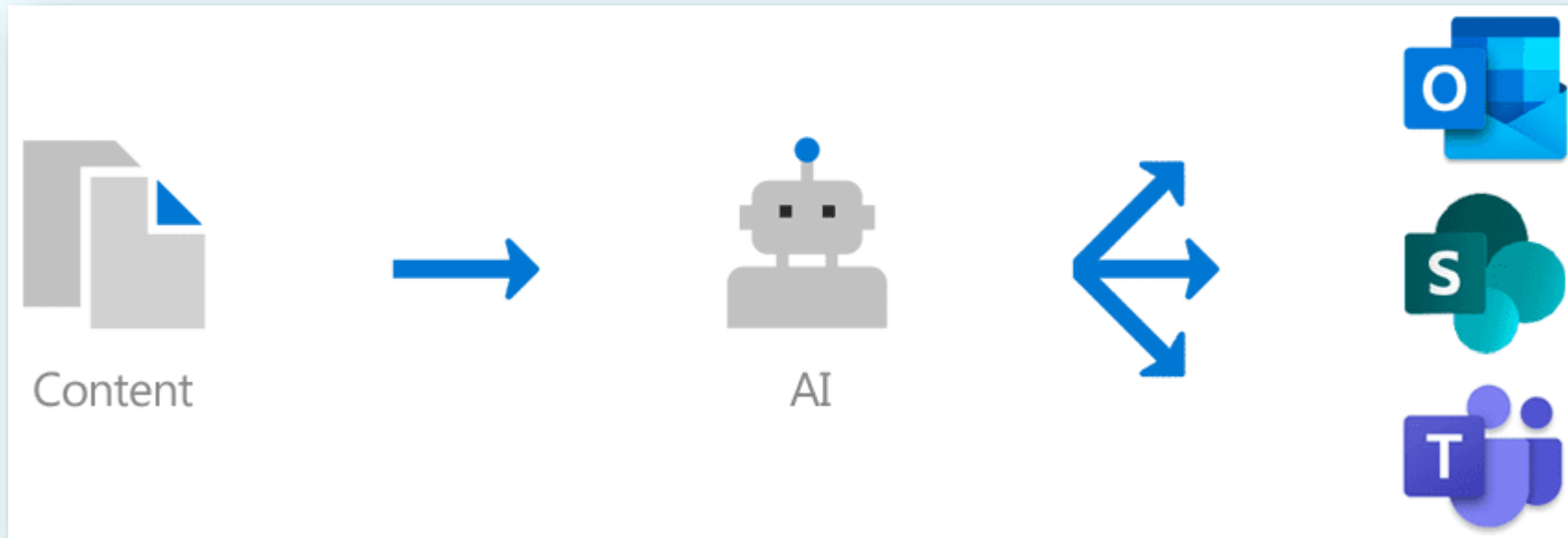
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Q&A

contact@gravityunion.com

Our Next Webinar

Project Cortex | January 18th 2021





**Thank you for
joining!**

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