



# Microsoft 365 Planning Playbook

*Ideas and guidance for getting the most out of Microsoft 365 in 2022.*

# Getting the most out of Microsoft 365

As a Microsoft Gold Partner, Kiefer Consulting is a trusted advisor to many departments in the State of California. We can help your organization leverage your investment in Microsoft 365 and assist you in rolling out new capabilities and applications.

Over the last year, we have been supporting clients in the deployment of modern workplace applications like Microsoft Power BI, Microsoft Teams, and Microsoft Power Automate. These tools are important to streamlining processes, enhancing enterprise collaboration, and improving communication across the organization.

If digital transformation is on the horizon for your organization, or if you have recently upgraded to Microsoft G5 licensing for the Government Community Cloud, you'll want to find a partner that can help you quickly and seamlessly take advantage of technology innovations to gain efficiencies.

This eBook was designed to introduce you to the applications that are available, potential use cases, and ideas on how an organization might get started in using these applications.

If you see something interesting in this eBook but would like to talk to an expert, please contact us to learn more.



## *Getting the most out of Microsoft 365*

*Collaboration Apps*

*Data Analytics & Visualization Apps*

*Workflow Automation / Optimization Apps*

# Collaboration Applications

## Working with others in Microsoft Teams

Microsoft Teams is the hub for teamwork where you and your team can collaborate on files, communicate, and streamline processes. It's simple to collaborate on a document in Microsoft Teams and you can easily co-author documents when you store files in Teams.

You can easily add a file to a Microsoft Teams site by uploading the file or dragging and dropping the file into the "files" window.

Microsoft has a great article that addresses how to add files to Microsoft Teams, create a new file in Teams, and how to share the file with internal and external users. Read more about how to use your files in Microsoft Teams here.

What you may not realize is that documents that are stored in Teams are being stored in a SharePoint site. Microsoft Teams is simply a new interface to what we traditionally called a SharePoint Team Site.

## Sharing "official" and "approved content with the organization

SharePoint is the application that should be used if your goal is to share content across the entire organization. We have a policy that content with value to the enterprise that may have originated in OneDrive or Microsoft Teams, should be archived in SharePoint. Information that may be useful and should be accessible to the entire organization can be stored on a SharePoint intranet or in a repository specific to the content type. At Kiefer, we use hub sites to store submitted proposals and all related documents. The SharePoint-based intranet are searchable, and documents are easy to locate. We also have HR forms and policy documents stored on our intranet home page. We've helped several clients build modern intranets using Microsoft 365.

## What to use and when.

If your organization is embracing the idea of the Modern Workplace and frictionless communication and collaboration, you want to ensure that there is a consistent experience with files. across projects and people. Digital transformation requires a consistent files experience when viewing, editing and co-authoring, sharing internally and with guests, syncing across devices, and being productive on the go.

	Teams	SharePoint
External Collaboration	▲	▲
Internal Collaboration	▲	▲
Content/File Management	▲ ■	▲
Publishing Information	▼	▲
Process Automation	▼	▲
Project Management	■	▲
Customized/ Branded User Experience	▼	▲

- ▲ Recommended for
- Recommended / Some limitations
- ▼ Not Recommended



# Collaboration Applications: Planning for Microsoft Teams

Microsoft has published a checklist for deploying Microsoft Teams. This is an excellent overview of what will be required to successfully rollout teams.

## Phase 1 - Start

- Understand teams and channels
- Create your first teams
- Determine readiness for deployment
- Meet with stakeholders
- Identify early adopters

## Phase 2 - Experiment

- Create your champions program
- Complete the governance quick start
- Define the usage scenarios
- Interview business stakeholders
- Map and prioritize business scenarios
- Onboard early adopters and gather feedback
- Onboard support

## Phase 3 - Scale

- Define outcomes and success measures
- Select a service enablement strategy
- Engage stakeholders
- Expand your implementation team
- Expand your governance and information management policies
- Optimize feedback and reporting
- Drive awareness and implement training
- Schedule service reviews



*We can help you in creating a plan and roadmap for  
deploying Microsoft 365 and Microsoft Teams*

# Data Analytics & Visualization Applications

The Kiefer Data Analytics and Visualization Practice Group has successfully helped clients better interact with their data and rapidly deploy business intelligence dashboards using Microsoft's business intelligence tool, Power BI.

While organizations seek to monitor KPIs and metrics, they often struggle in finding the time and resources to analyze and interpret this precious and valuable data. These data sets often contain meaningful insights that could enable an organization to run more efficiently, however, without the right tools and expertise, an organization will continue to make decisions based on their "gut" rather than the facts. Power BI and business intelligence dashboards make it easier for organizations to better interact and consume large amounts of data and make better business decisions.

## The Value of Dashboards

Kiefer Consulting has experience in rapid dashboard development. Our team has the expertise and experience in building dashboards that have assisted organizations in managing budgets, monitoring complex projects, resource management, and tracking KPIs. Our dashboards often pull data from decentralized data sources and aggregate the data so data relationships can be made, trends can be recognized, and anomalies can be quickly identified.

## A Rapid Dashboard Development Deployment Methodology

Kiefer has established a proven approach that focuses on rapid deployment and iteration.

Business Intelligence differs from our typical software development project where its common to have an "all or nothing" mentality. In a business intelligence implementation, a rapid and iterative deployment is not only preferred, it's typically more successful in helping an organization in building a data culture. We believe that its "best practice" to focus on a specific business area. We typically will work with a business unit that has the most to gain from delivering improved reporting. We align with a functional area of the business, like the Project Management Office, Sales Department, Supply Chain, Finance or Operations. We deliver to this area of the business first with a goal of delivering fast. Once we deliver the first dashboard, we work with the client in an iterative style to advance more meaningful data insights and gain momentum and credibility. We then take the lessons we've learned into the next area of business and start again.



# Rapid Dashboard Development

Kiefer uses a proven methodology to initiate a **dashboard development** project. Here are a few of the high-level questions we ask in order to estimate level of effort, time, cost, etc.

First, it's important to understand what you'd like to learn from your data. Think about the questions you'd like to answer with a visualization.

- Make all the data sets you'd like us to work with available to the Kiefer team. These are the data sets where the answers to the questions live. Sometimes the data may not all be in one data set... so, you'll need to provide us with access to all pertinent data. We can use a Power BI Gateway to interface with the data. Worst case, the data can be extracted and provided as a CSV file.
- Kiefer will then look at the data, understand what data is important to present on a Power BI dashboard and determine how best to answer the questions using the dashboard. This step is important to determining the level of effort required to build the dashboards. By examining the data and understanding the insights you'd like to gain, we'll be able to estimate how many hours we'd need to deliver the dashboard solution.
- Based on the questions and the data, we'll give you a proposal for each dashboard. Depending on the amount of work we need to do with the data (formatting, cleansing, etc.), the dashboard build and desired branding. The cost of development may vary from dashboard to dashboard.
- Kiefer can also help you navigate the licensing models for Power BI. We are a services provider, so we don't sell licenses, but can help you in better understanding the appropriate licensing agreement so you can leverage Power BI and users (internal or external) will have access to dashboards.

Rapid development is an iterative process that relies on client engagement. When our clients provide the data and we build the dashboard, the client will often think about additional questions they'd like to see answered. This is very common.

*"This is great. Now, can you show build a visualization that shows all expenses that exceed the budget by 10% or more?"*

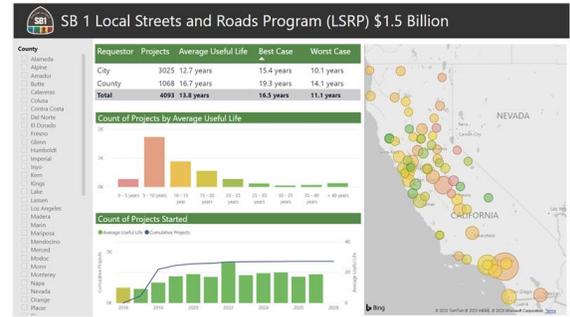
It is common for customers to see what is possible and find more questions they want answered.

Our customers quickly realize that there are other questions that are important to ask, data relationships that must be made to better understand the data or specific visualizations that will help in gaining the insights they seek.

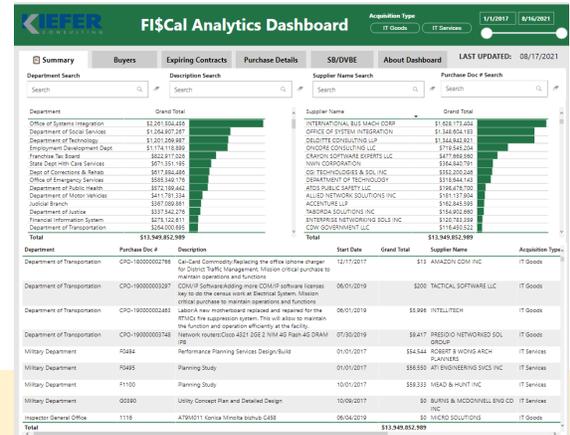
Kiefer's process and approach to data analytics and visualization has helped organizations become more data-driven and has helped many organizations in both the public and private sector create a data culture. Data culture is an organizational perspective that puts value on data and the insights that the data can provide.



MiraCosta College Measure MM Dashboard



SB1 Proof of Concept Dashboard



Fi\$Cal Analytics Dashboard

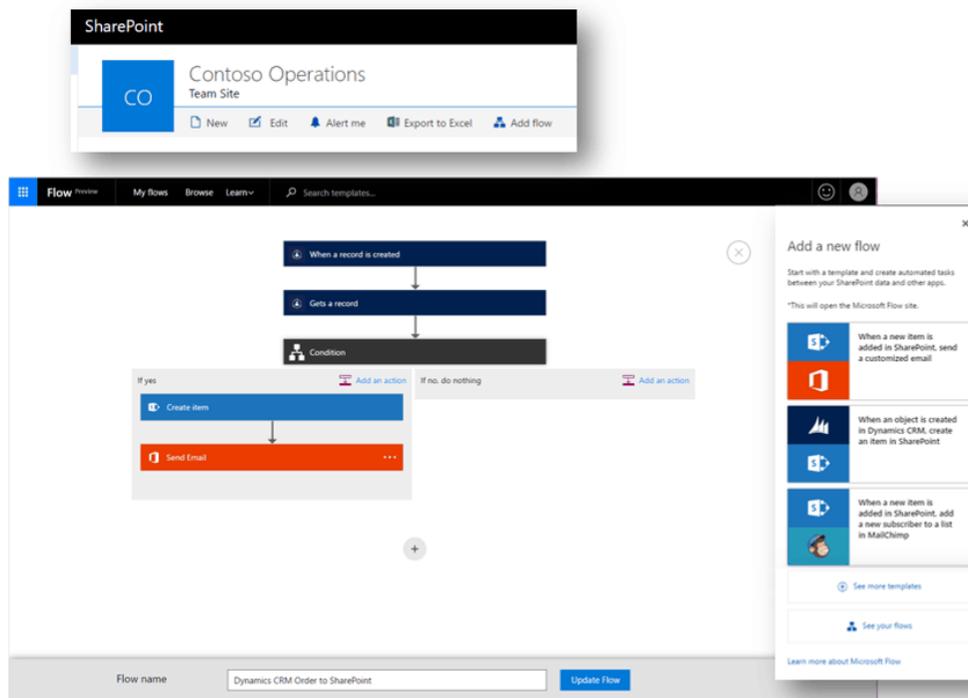
## Let's Get Started

Kiefer has worked with clients to deliver a proof-of-concept. This is often a very logical place to start. By starting small, iterating, and then expanding, the organization can better understand where and how dashboards can provide benefit to the organization.

Contact Kiefer to learn more, see examples of our work, and find out more about what we see as "best practice" for an organization that is looking to leverage data in a more meaningful way. And, if you have an urgent and pressing need to report, assess, or communicate, you may need us to help you in a rapid dashboard deployment. This is also something you can count on us to help you with.

# Workflow Automation Applications: Power Automate

Over the past year, we've seen increased interest from customers to optimize processes. Organizations in both the public-sector and private sector are in search of ways to eliminate redundant tasks and time-consuming data entry to deliver faster and higher-value results with little to no added cost.



What is Power Automate? ▶

**Automate quickly and more securely**

*Empower everyone to build automated processes with flows in Power Automate. Use low-code, drag-and-drop tools and hundreds of prebuilt connectors that automate repetitive, mundane tasks with ease.*

**Boost efficiency**

*Record and visualize your end-to-end processes with process advisor, providing guided recommendations for creating flows and deep insights that take the guesswork out of what to automate.*

# Getting Started with Power Automate

We've learned a lot about Microsoft Power Automate through trial and error. While we encourage organizations to kick the tires on all the Microsoft applications, we are also keen to the idea that you can learn a lot from someone that has spent time with the technology and has tested the limits of what it can and can't do. Here are a few tips and considerations that may help you in successfully building your first "Flow".

## *Map out your process*

Before you attempt anything in Power Automate, map out your process in Visio or by using a template like this one. Many organizations fail on their automation/optimization initiative because they fail to clearly understand the process, limitations, and barriers to automating or optimizing a process.

## *Start small*

You don't have to re-engineer the entire process. You don't have to optimize a process from end-to-end. You can start small and optimize a part of the process.

## *Start with the service account*

When getting ready to begin building a Flow, start with the service account that will be used for the Flow. Otherwise, if you start with a personal user account, you will need to update every "send an email" action in your flow, and every "update item" action affecting your SharePoint list to use the service account connections prior to go-live.

## *Make documentation a priority*

Be sure to label your Flow steps, conditions, and actions! (Good) Documentation is extremely helpful for handing off management of a Flow, and for keeping it in alignment with written documentation.

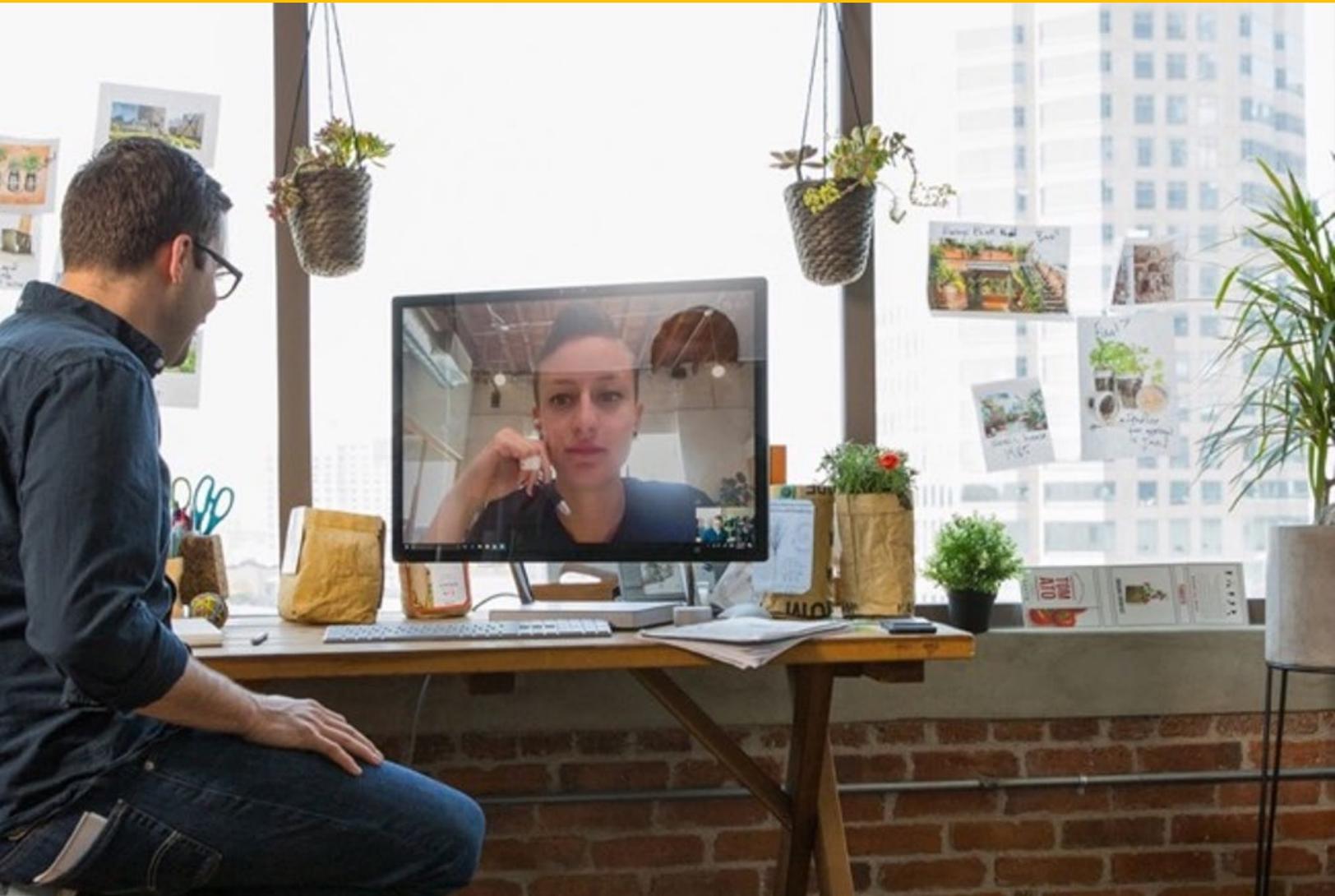
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*Clients call Kiefer when they are looking to automate processes, improve workflows or better understand their processes. We bring a full team to these engagements which provides the client with business analysts, developers, and experts in Microsoft technology. Contact us if you'd like to learn more about our Modern Workplace Practice or if you need help with Microsoft Power Automate.*

*Power Automate Best Practices can be found here: [Power Automate Best Practices - Kiefer Consulting](#)*

# Microsoft 365 Planning Checklist

Collaboration Applications	Data Analytics and Visualization	Workflow Optimization & Automation
<p>Which features are currently deployed?</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Chat</li> <li><input type="checkbox"/> Video</li> <li><input type="checkbox"/> Team Collaboration</li> <li><input type="checkbox"/> External Sharing</li> <li><input type="checkbox"/> Intranet</li> </ul>	<p>Is your organization leveraging tools for data analytics and visualization?</p> <p><i>If yes, are you leveraging these tool at a departmental level or enterprise level?</i></p>	<p>Are there processes that still require the manual routing and/or approval of documents?</p>
<p>What Microsoft Teams features would you like to deploy/improve in 2022?</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Chat</li> <li><input type="checkbox"/> Video</li> <li><input type="checkbox"/> Team Collaboration</li> <li><input type="checkbox"/> External Sharing</li> <li><input type="checkbox"/> Intranet</li> </ul>	<p>What goals do you have for building a data culture in 2022?</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p>	<p>Have certain processes been more difficult to manage with remote employees or a distributed workforce?</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Routing</li> <li><input type="checkbox"/> Approvals</li> <li><input type="checkbox"/> Tracking items and where they are in the process</li> <li><input type="checkbox"/> Collecting signatures</li> </ul>
<p>Did you deploy collaboration applications without technical guidance and are looking for help to apply governance to collaboration applications (Teams and/or SharePoint)?</p> <p>_____</p> <p>_____</p>	<p>What areas do you need assistance?</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Data collection</li> <li><input type="checkbox"/> Data cleansing</li> <li><input type="checkbox"/> Data storage / warehousing</li> <li><input type="checkbox"/> Analytics best practices</li> <li><input type="checkbox"/> Visualization best practices</li> <li><input type="checkbox"/> Data analytics infrastructure</li> </ul>	<p>Have you mapped out your processes?</p>
<p>Are your collaboration tools being used at enterprise scale, or limited to only certain parts of the organization?</p> <p>_____</p> <p>_____</p>	 <p><i>We can help you in modernizing the workplace and assist you in leveraging Microsoft 365.</i></p>	<p>Do you know how long your processes take from start to finish?</p> <p>Would it be beneficial to be able to track processes using a dashboard?</p>



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