envision IT

Leaders in SharePoint Solutions

Envision IT and Valo Office 365 Discovery Lunch Seminar

July 11, 2019

Peter Carson

- President, Envision IT
- 9 time Microsoft Office Apps and Services MVP
- Partner Seller, Microsoft Canada
- http://blog.petercarson.ca
- www.envisionit.com
- Twitter @carsonpeter
- President Toronto SharePoint User Group

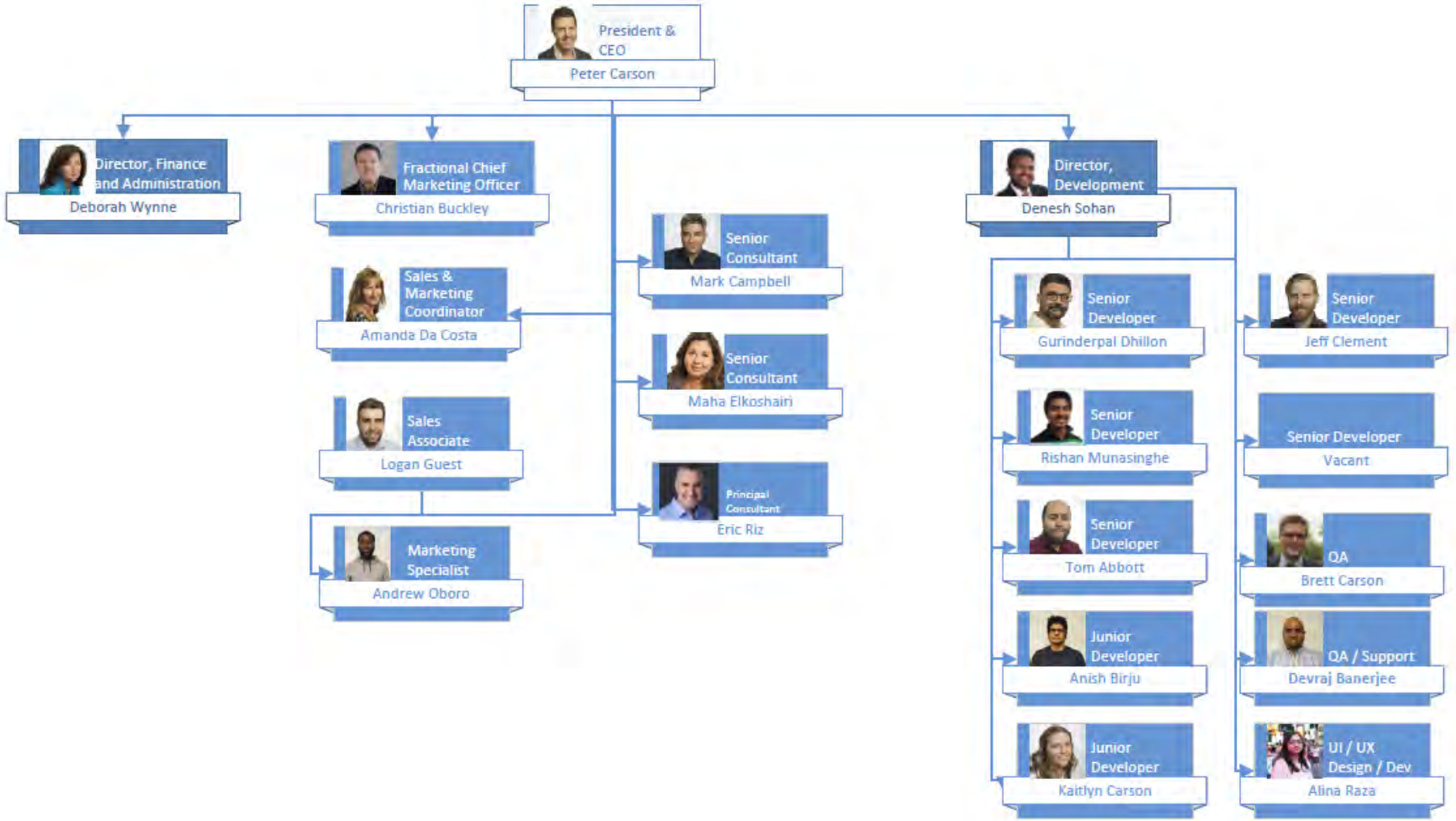
Maha Elkoshairi

- Senior Consultant, Envision IT
- Project Manager and Business Analyst
- Business Analysis, Project Management, Agile Software Development
- Web Content Management, Intranets

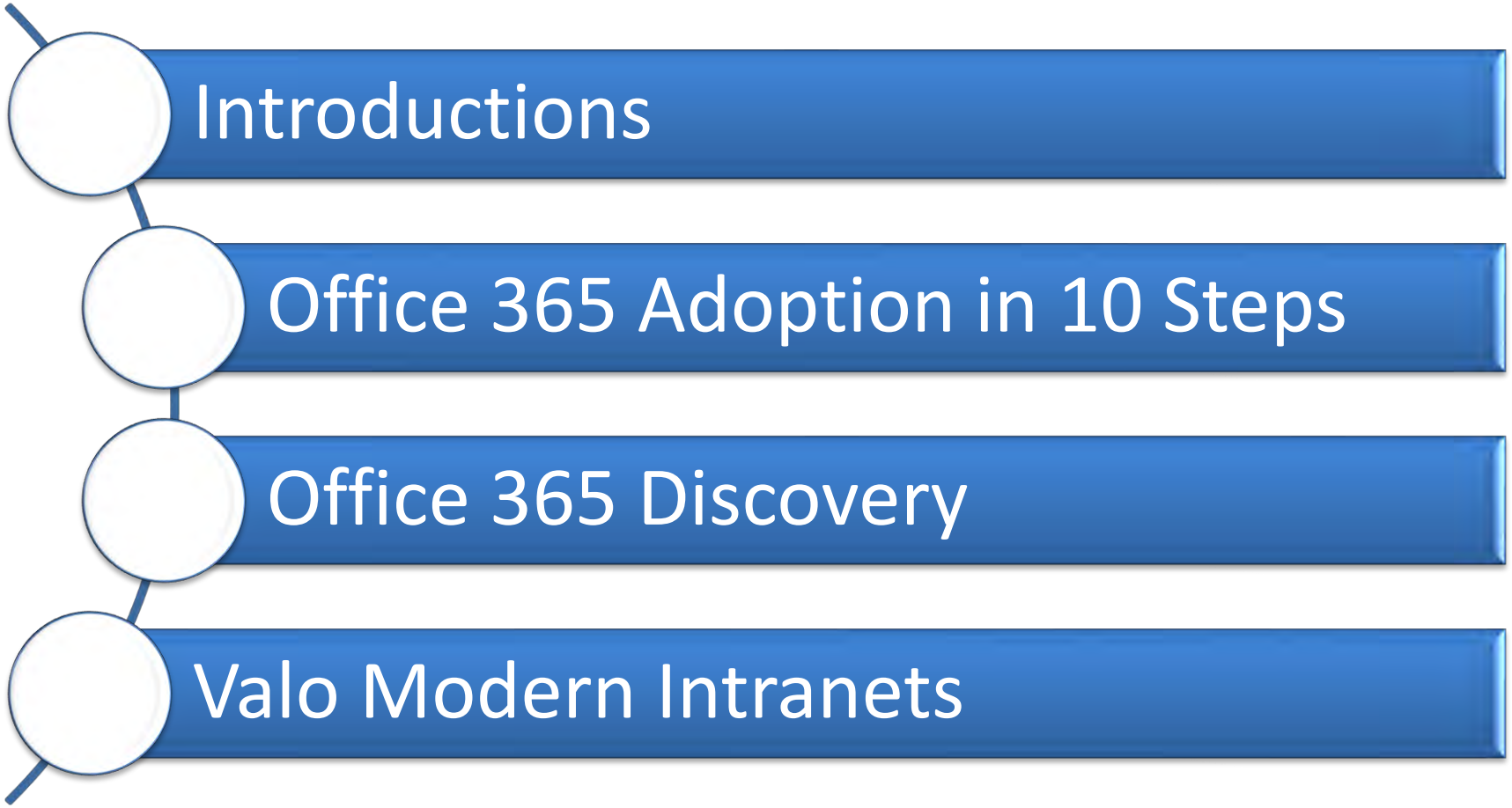
Eric Riz

- Principal Consultant: Enterprise Content Management Strategy and Governance
- Microsoft Apps & Services MVP
- Recognized thought-leader in the areas of governance, strategy and corporate design
- www.ericriz.com
- Deep experience in strategic planning, digital workplace design and implementation
- Extensive hands-on work with information systems and records management platforms
- Recognized speaker and author across the Microsoft ecosystem

Org Chart


President & CEO
Peter Carson
Director, Finance and Administration
Deborah Wynne
Fractional Chief Marketing Officer
Christian Buckley
Sales & Marketing Coordinator
Amanda Da Costa
Sales Associate
Logan Guest
Marketing Specialist
Andrew Oboro
Senior Consultant
Mark Campbell
Senior Consultant
Maha Elkoshairi
Principal Consultant
Eric Riz
Director, Development
Denesh Sohan
Senior Developer
Gurinderpal Dhillon
Senior Developer
Rishan Munasinghe
Senior Developer
Tom Abbott
Junior Developer
Anish Birju
Junior Developer
Kaitlyn Carson
Senior Developer
Jeff Clement
Senior Developer
Vacant
QA
Brett Carson
QA / Support
Devraj Banerjee
UI / UX Design / Dev
Alina Raza

Agenda


Introductions
Office 365 Adoption in 10 Steps
Office 365 Discovery
Valo Modern Intranets

Envision IT Overview

- Office 365 productivity consultants
- Go-to partner for SharePoint websites, intranets, extranets, and collaboration portals
- Working with SharePoint since 2001
- Microsoft Gold Partner
- Multiple award winner

Microsoft Partner
Gold Collaboration and Content
Silver Cloud Productivity
Silver Cloud Platform
Silver Application Development

IMPACT AWARDS WINNER

METALOGIX BEST OF BREED

AWARDS

International Association of Microsoft Channel Partners
Apps Development Partner Award 2015
WINNER - CANADA Region

CDN CHANNEL ELITE AWARDS

Envision IT

Public Websites

Intranets / Staff Portals

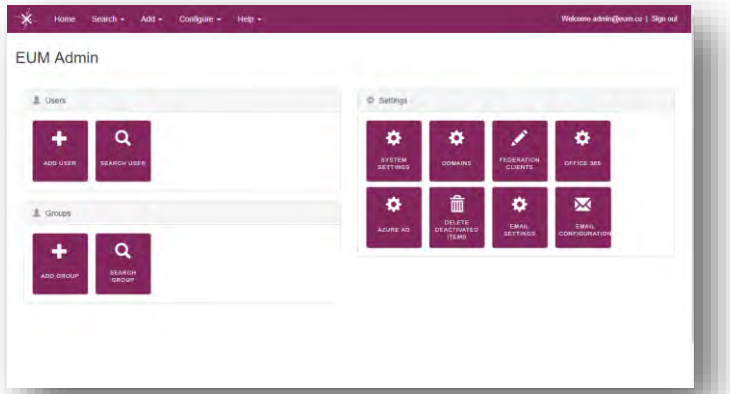
Extranets / Member Portals

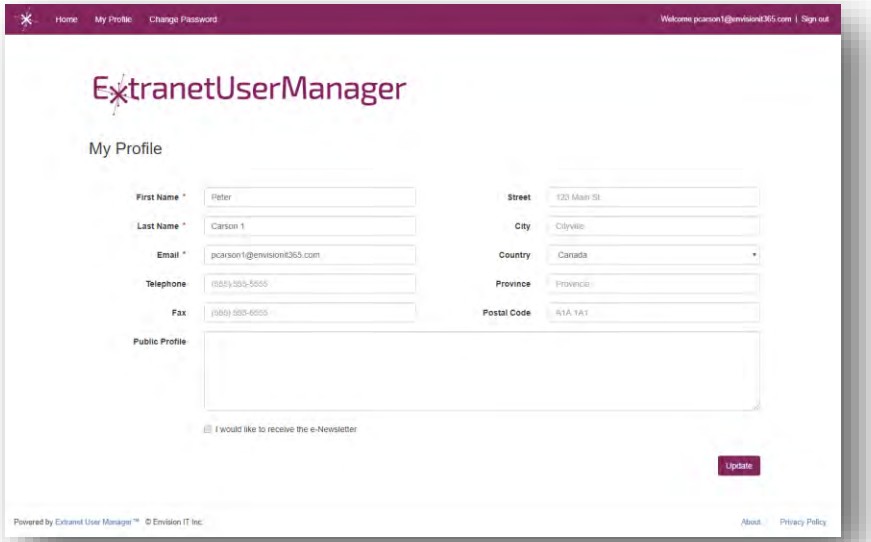
SharePoint

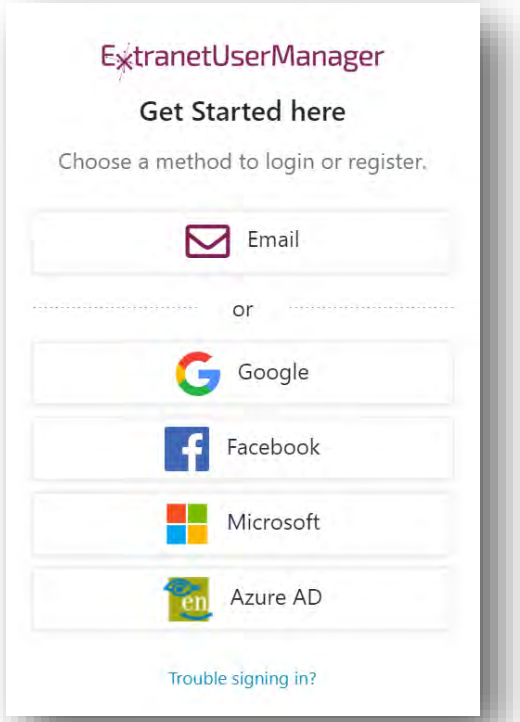
Office 365

Microsoft Azure

Extranet User Manager







- Easy delegation of user management to business
- Self-registration, approvals, forgotten password reset
- Simplified login for both internal and external users

Upcoming Webinar

How to Build a Structured Extranet Using Azure AD B2B

Tuesday, July 23, 2019

12 - 1 PM EDT

http://eum.co/events

SharePoint
CONFERENCE

Microsoft

Office 365 Adoption in 10 Steps

Eric Riz
Founder & CEO
Empty Cubicle Inc.
riz@thesharepointjourney.com

EMPTY CUBICLE

SharePoint CONFERENCE

What are you using?

A Brief History

Early Releases

SharePoint Portal Server 2001

SharePoint Team Services 2002

SharePoint Services (Free)

SharePoint Portal Server 2003

Evolution

SharePoint Server 2010

BPOS

Acquisition of Yammer

Renewal

SharePoint Server 2016

Future of SharePoint

OneDrive NGSC

Modern sites, pages, lists & libraries

Connected to Office 365 groups

PowerApps & Flow

SharePoint mobile app

SharePoint framework

Transformation

Hub sites

SharePoint spaces

List innovations

Connected web parts

Organizational news

Modern intranet & portals

SharePoint Server 2019

2001-2003

2006-2008

2009-2012

2013-2015

2016

2017

2018

Velocity

Microsoft Office SharePoint Server 2007

$1B business

Acquisition of FAST Search & Transfer

Microsoft Online Services

Transition

SharePoint Server 2013

Office 365 & SharePoint Online

Innovation

Microsoft Teams files/wiki

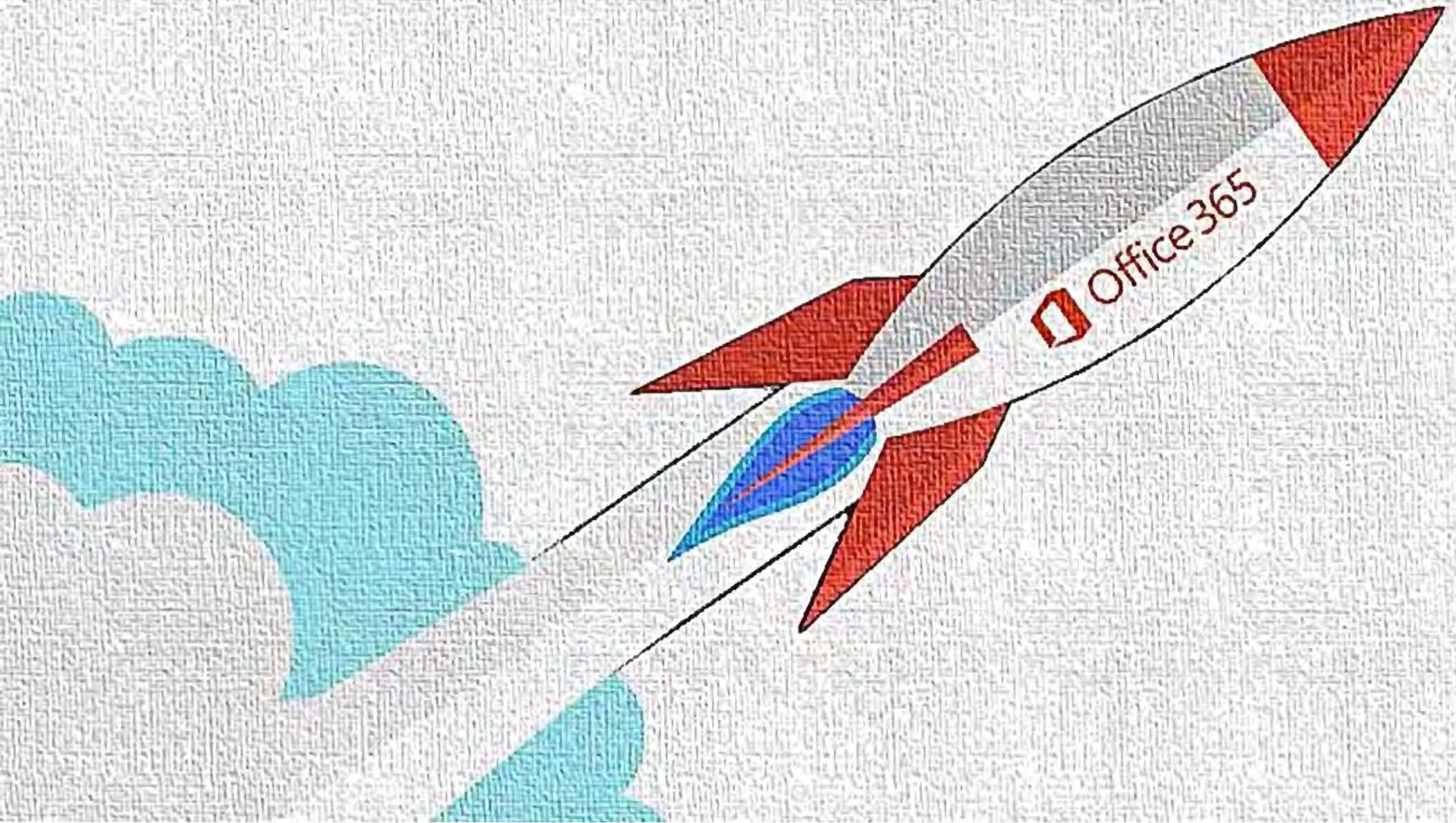
OneDrive Files On-Demand

News

Communication sites

Yammer integration

Hub sites

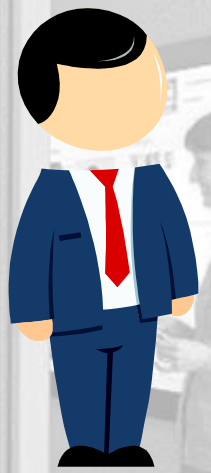

Office 365

The Challenge of Adoption

- Resources – People, technology, knowledge
- Scope - Project size, goals, requirements
- Time – Task durations, dependencies, critical path
- Money – Budgets, costs, contingencies

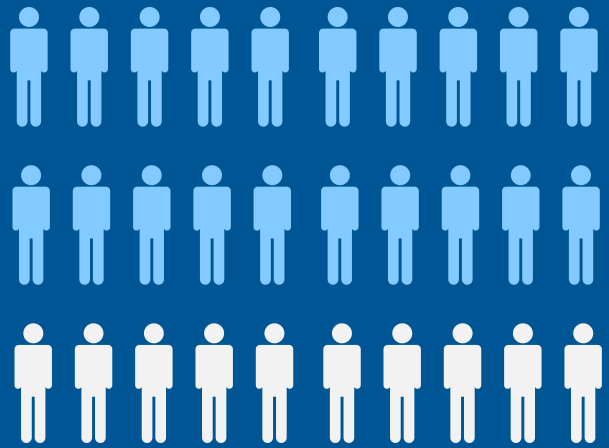
MEET THE MODERN LEARNER

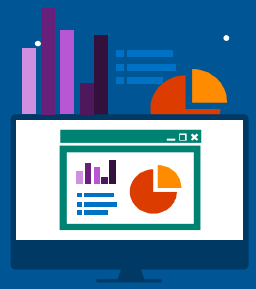
JOE EMPLOYEE



OVERWHELMED
DISTRACTED
IMPATIENT

Two thirds of workers complain that they don't have enough time to complete their jobs





80%

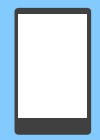
80% of employees admit to using non-approved SaaS apps in their jobs

20%

20% of the workforce is comprised of contractors, temporary staff and freelancers

30

Number of times per hour checking inbox



9

Knowledge Workers unlock their smartphones up to 9 times every hour

5

Workers get interrupted as often as once every 5 minutes

MODERN COLLABORATION
PERSONALIZED INSIGHTS
THE MODERN WORKPLACE
CONTENT MANAGEMENT
SECURITY AND COMPLIANCE

Primary Focus on Systems of Record are a thing of the past

EMPTY CUBICLE

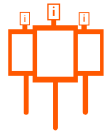
We need to shift our focus
to *Systems of Engagement*

9 types of innovation

Breakthrough

Business Model

Disruption



Incremental

Process

Product

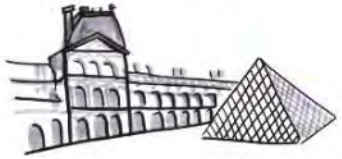
Organization

Outcome-Driven

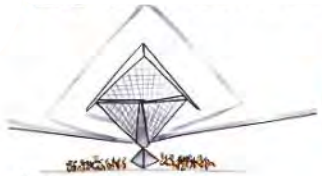
Service

©2019 Empty Cubicle Inc. All Rights Reserved.

Digital Workplace



IT'S INSUFFICIENT TO JUST BE BEAUTIFUL ON THE OUTSIDE



YOU HAVE TO BE BEAUTIFUL ON THE INSIDE TOO.

Sustainable growth + effective competitive success requires transformation from within

DIGITAL WORKPLACE IS A **JOURNEY**

USER ENGAGEMENT IS NOT AN AFTERTHOUGHT

ENGAGEMENT × TECHNOLOGY = DIGITAL WORKPLACE

10 × 10 = 100

0 × 10 = 0

TOOLS ARE GREAT, BUT ARE WORTHLESS WITHOUT ENGAGEMENT

→ BE CONTEXTUALLY INTELLIGENT

→ SENSE + RESPOND THROUGH HUMAN/MACHINE INTERACTIONS

SPEND TO MAKE THE INTERFACE BEAUTIFUL + EASY TO USE

CONNECT the DOTS

ASSETS

PEOPLE

BUSINESS

GIVE PEOPLE A VOICE! | IT'S A MERITOCRACY!

→ IF YOU POST GREAT CONTENT, YOUR PERSONAL BRAND GROWS

Score the content

Change the way work is being done

Curate the marketplace to emphasize "Top" results

MEASURE!

→ UNDERSTAND HOW PEOPLE ARE DIGESTING + USING THE INFORMATION/ASSETS

⇒ create asset scores

USE DATA TO MAKE DECISIONS

choose the SPIKES that will have the most **IMPACT**

Directly Aligned to business priorities

MEASURABLE **OUTCOMES**

how do we create a digital culture?

ORGANIC GROWTH

IMPROVED EXPERIENCE

Digital workplace isn't a thing... ..it's a JOURNEY

START FIRES IN THE ORGANIZATION

Are you trying to DIGITIZE or DIGITALIZE?

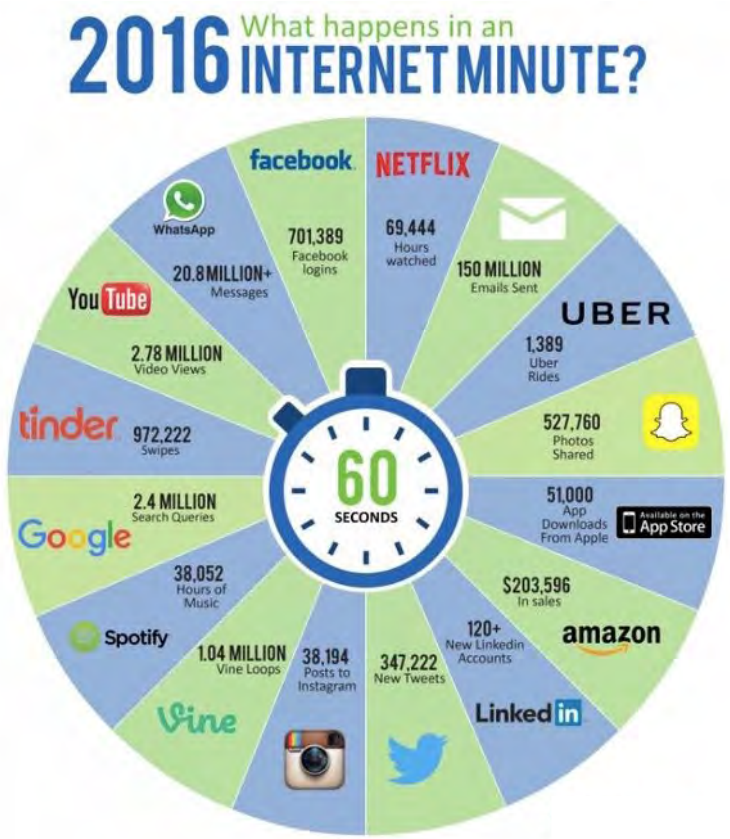
THINK ABOUT the EXPERIENCE ACROSS DEVICES

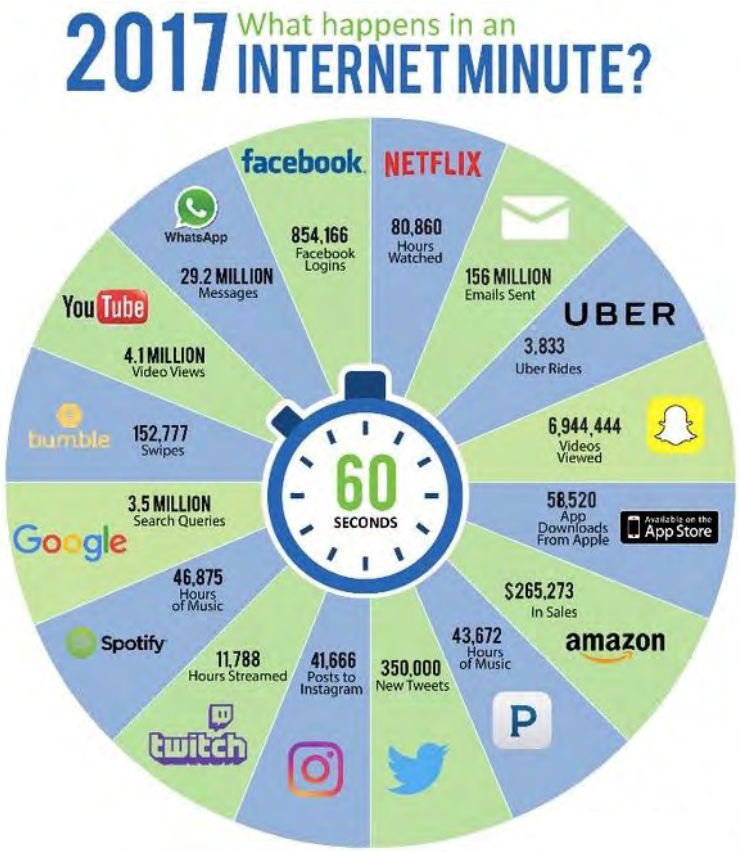
ANALYTICS

Share! Recognize! Reward! Sustain!

→ create a marketplace for knowledge + innovation

GRAPHICS BY E. AKERS - crazzerlabs.com





©2019 Empty Cubicle Inc. All Rights Reserved.

EMPTY CUBICLE

©2019 Empty Cubicle Inc. All Rights Reserved.

BE IN THE KNOW

Microsoft | Microsoft 365

Welcome to the new Roadmap

TAKE A QUICK TOUR >

Microsoft 365 Roadmap

Get the Latest Updates

Microsoft 365 is a complete, intelligent solution including Office 365, Windows 10, and Enterprise Mobility + Security, that empowers everyone to be creative and work together, securely.

Filters

Products

Platform

Cloud Instance

New & Updated Features

Showing 639 updates[1]:

Download Share RSS

In development	Rolling out	Launched
186	89	363

Description	Status	Tags	Release
Risky IP for Active Directory Federation Services (ADFS) extranet lockout protection	Public Preview	Rolling out	Azure Active Directory	Q2 CY2019
Outlook for Windows: Default permissions for sharing links	In development		Q4 CY2019
Improvements in reporting of 'bad items' during mailbox migrations	In development	Exchange	Q3 CY2019

10 Steps to Adoption

1. K-W-Y-B
2. Office 365 SMEs & Champions
3. Success Manager
4. Corporate Communications Plan
5. Gamification
6. Realization & Environment
7. Operational Support
8. Education Plan
9. Centralized Support
10. Quick Wins

What are your
business goals?
Have you created an
IT strategy?

Set Expectations

“If I'd asked customers what they wanted, they would have said "a faster horse".
– Henry Ford

Office 365 SME's & Champions

Knowledgeable

A dedicated team who has the corporate information required

Secure

A trusted source of information and content (perhaps) not otherwise available

Responsive

Set a protocol to respond to questions and emails within X period of time; catalog anonymously

Office 365 Success Manager

An Evangelist Role that works WITH all Business Lines

Working throughout the business with all users, questions and driving empowerment

A functional expert who understands the inner workings and configuration of 365

Strategic thinker who can adapt the environment based on questions asked

Defensible auditing insights and analytics based on best practices and data

Corporate Communication Plan

Mission Statement	Business Objectives	Expectations	Education & Involvement
Why is 365 being used inside your organization and how will it be used to better the organization?	What objectives are being set and met with and for 365?	How and when to use 365 throughout the organization – when will updates come in and how can I be involved?	When will teams be trained and how will they supported month to month?

Centralized Support

Who and How

- ✓ Who can I go to?
- ✓ Where can I get answers?

Automation

- ✓ Use the tool
- ✓ Integrate and deliver

Analytics and Intelligence

- ✓ Reports and feedback

Realization and Environment

Success isn't Guaranteed

- ✓ Know your pressure points and prepare to reset

Competing Products Exist

- ✓ Adoption from other platforms
- ✓ Leverage the knowledge

People are Watching

- ✓ Success breeds success
- Celebrate the wins

Gamification

Tools

- Exchange
- SharePoint
- OneDrive
- Groups
- Skype for Business
- Teams
- To-Do
- Sway
- Forms
- MyAnalytics
- And more…

Knowledge

- Who does what?
- Support
- Expertise
- External Sources
- Twitter
- Yammer
- Slack
- And more…

Games

- Scavenger Hunt
- Missions and Badges
- Compliance Points
- Rewards and Recognition

Organizational Support

What is the company doing to commit and show their support?

Education and Training

An ever-changing **adoption** landscape requires constant education and support

Millions of opportunities,

thousands of options,

hundreds of touch-points

Quick Wins

People

Who will access information, and when?

Processes

What can we automate to facilitate governance?

Technology

Effective use and actions is critical

Culture

What is the threshold for your organization?

IT changed landscape has created opportunities for businesses to solve problems today – Leverage that!!

The 1 million subscriber mark

EMPTY CUBICLE

©2019 Empty Cubicle Inc. All Rights Reserved.

Summary

Why are you Using Office 365?

- Engaging Business Stakeholders
- Assuring Technology Roadmap
- Optimizing Existing IT Investments
- Desires To Do Things Properly
- Enterprise Collaboration & Workflow
- Enterprise Document Management
- Transcend How Work Gets Done
- IT Business Alignment

Best Practices

- Determine Initial principles and goals
- Classify your business information
- Develop an education strategy
- Develop an ongoing plan
- https://docs.microsoft.com/en-us/sharepoint/governance/governance

Summary

- What's your Journey
- Strategy Succeeds
- Showcase and Deployment
- Communicate

SharePoint
CONFERENCE
Thank you

Thank you

Questions

Know What You're Building	Provide the Required Support	Take the Time to Adopt

aka.ms/SPC/Sessions/3570	Share slides and resources from this session
aka.ms/SPC/Sessions/SharePoint	Learn more from related sessions at SPC19
aka.ms/SharePoint/Resources	Explore resources for deployment and adoption
aka.ms/SharePoint/Blog	Stay up to date on the latest product news
aka.ms/SharePoint/Blog/SPC19	Review the news and announcements from SPC19
aka.ms/SharePoint/Community	Join the conversation in the Microsoft Technical Community
Twitter	@RizInsights
Instagram	@RizInsights @RoadtoSPC
Hashtags	#SPC19 @SharePoint #Office365 #Microsoft365 #MVPBuzz

riz@thesharepointjourney.com

Microsoft

© Copyright Microsoft Corporation. All rights reserved.

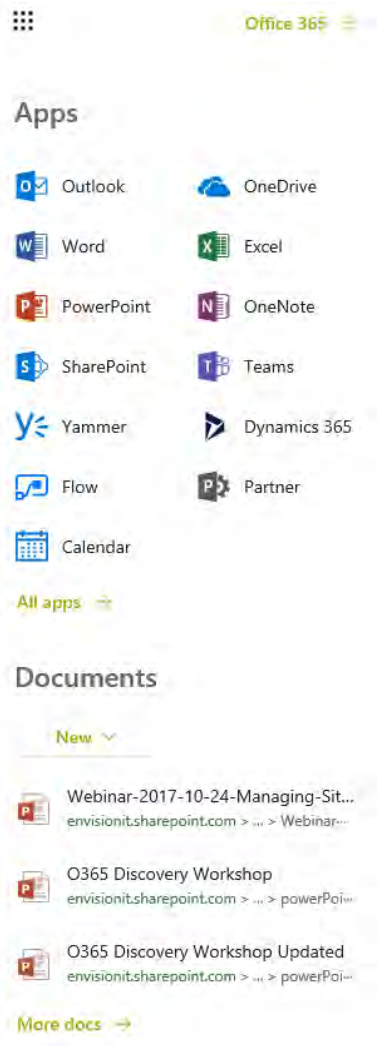
SharePoint CONFERENCE

Office 365 Discovery Workshop

envision IT

Leaders in SharePoint Solutions

Office 365 Intro



- Suite of desktop, mobile and browser based productivity tools
- Windows, Mac, iOS, and Android support
- Supports all the major browsers

Office Online

- Office Online Suite includes
  - Word Online
  - PowerPoint Online
  - Excel Online
  - OneNote
- Multiple Browser/Device Support

Mobile Apps

Microsoft Outlook

Microsoft OneDrive

Microsoft Word

Microsoft Planner

Yammer

Office 365 Admin

Microsoft OneNote

Microsoft SharePoint

Microsoft Excel

Microsoft Flow

Office Delve – for Office

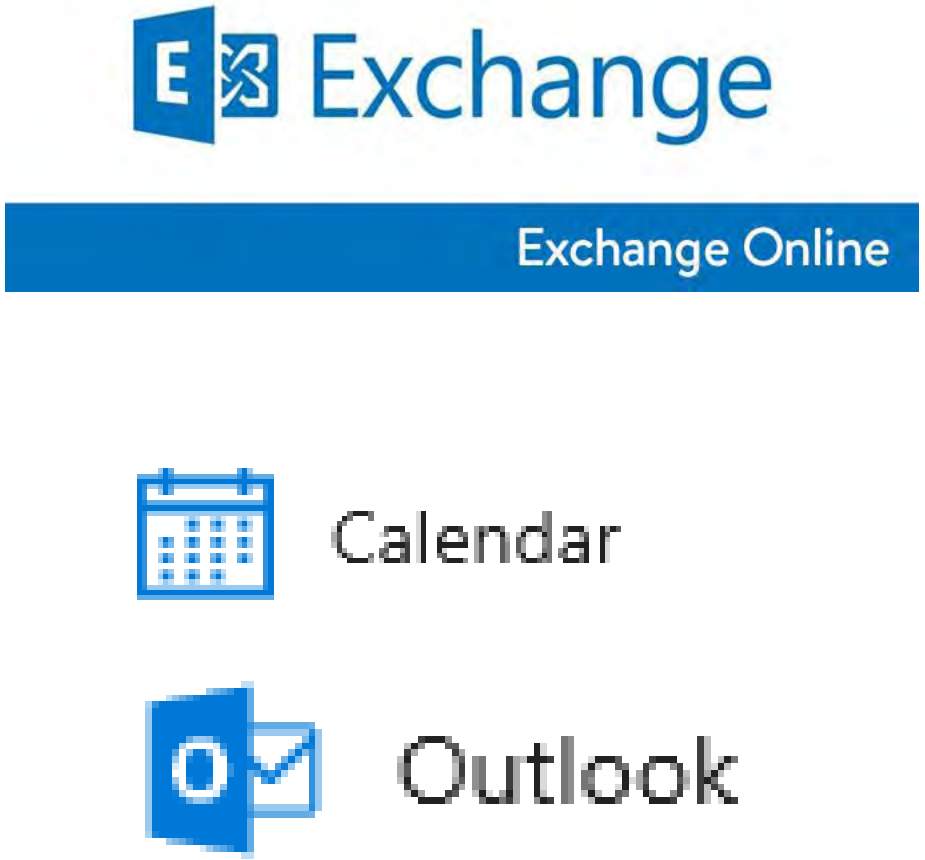
Microsoft Authenticator

Microsoft Teams

Microsoft PowerPoint

Microsoft Power BI

Exchange Online



- Microsoft hosted email, calendars, and contacts
- Available on the web, in Outlook, and on mobile devices
- 50 GB mailbox
- 50 GB / Unlimited (E3/E5 plans) email archive

Skype for Business

- Presence
- Instant messaging
- Audio and video calls
- Online meetings and sharing
- Merging / moving to Microsoft Teams

Yammer

- Enterprise social network – not Facebook
- Drives productivity through team collaboration
- Engages employees

Microsoft Teams

- Replacing functionality of Skype for Business:
  - Persistent chat
  - Presence
  - Audio and video calls
  - Online meetings and sharing
  - Files (SharePoint)
- Org wide channel eliminates need for Yammer for most organizations

- Microsoft has positioned Teams as the launchpad to O365 services
- Each Team is connected to an O365 Group

Notebook/OneNote

- Tool for unstructured, free-form note taking
- Create Sections and Pages
- Add text, images, audio, video, hyperlinks, etc…
  - Embeded Video cannot be added in OneNote Online, but once embedded can be played in OneNote Online
- Can be opened in OneNote application and synchronized
- Multiple people can edit the same notebook simultaneously

Planner

- Rudimentary task management tool
- Plan is created with each Office 365 Group
  - Conversely, an Office 365 Group will be created for each Plan
  - If either is deleted, both are deleted
- Plans consist of Buckets and Tasks
- Tasks may be assigned, contain checklists, due dates, attachments, description and comments

Power BI

- Connect to data in Excel, corporate data sources, and external services
- Design your reports in Excel or Power BI Designer
- Publish them to the web
- https://powerbi.microsoft.com

OneDrive for Business

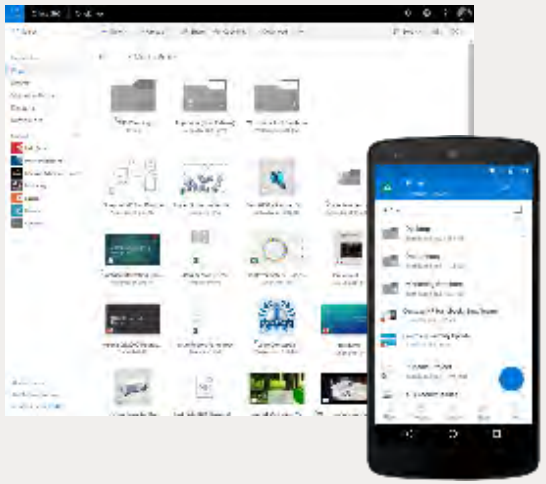
- 1 TB file storage for each user
- Sync files across all your devices for online and offline access
- Use search to find your files
- Share your files with colleagues and external users

SharePoint Online

- Communicate and Collaborate
- Corporate Intranet
- Team Sites
- Forms and Workflows

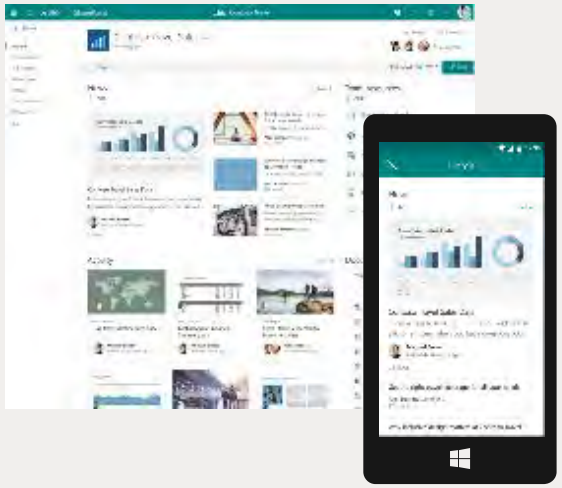
Three Places to Work

OneDrive for Business



Private by default

Team sites

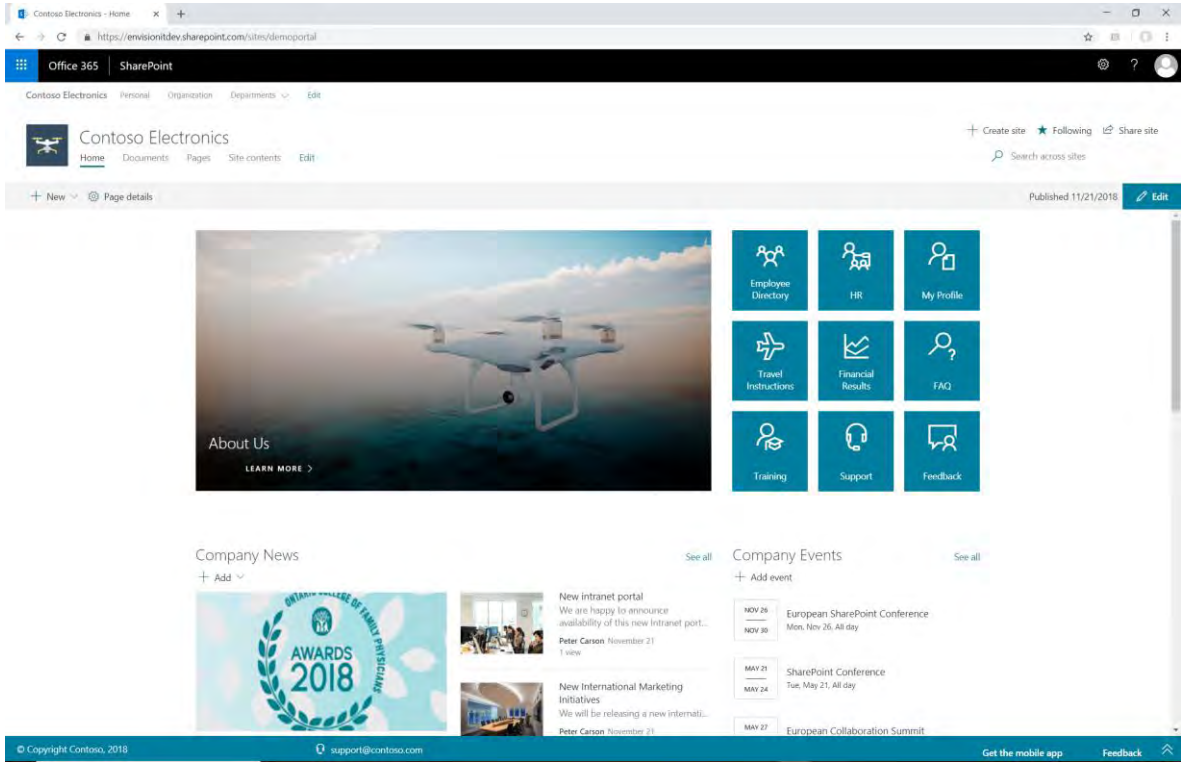


Share content with your group

Communication sites

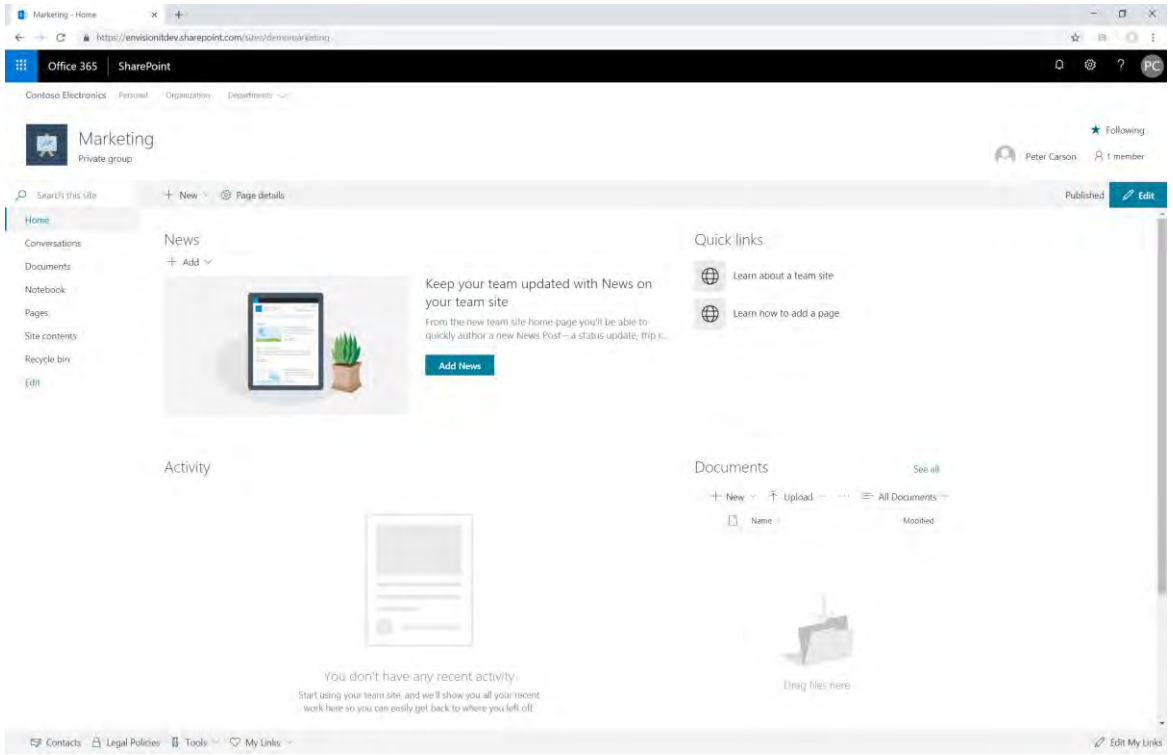
Inform and engage a broader audience

Communications vs. Team Sites



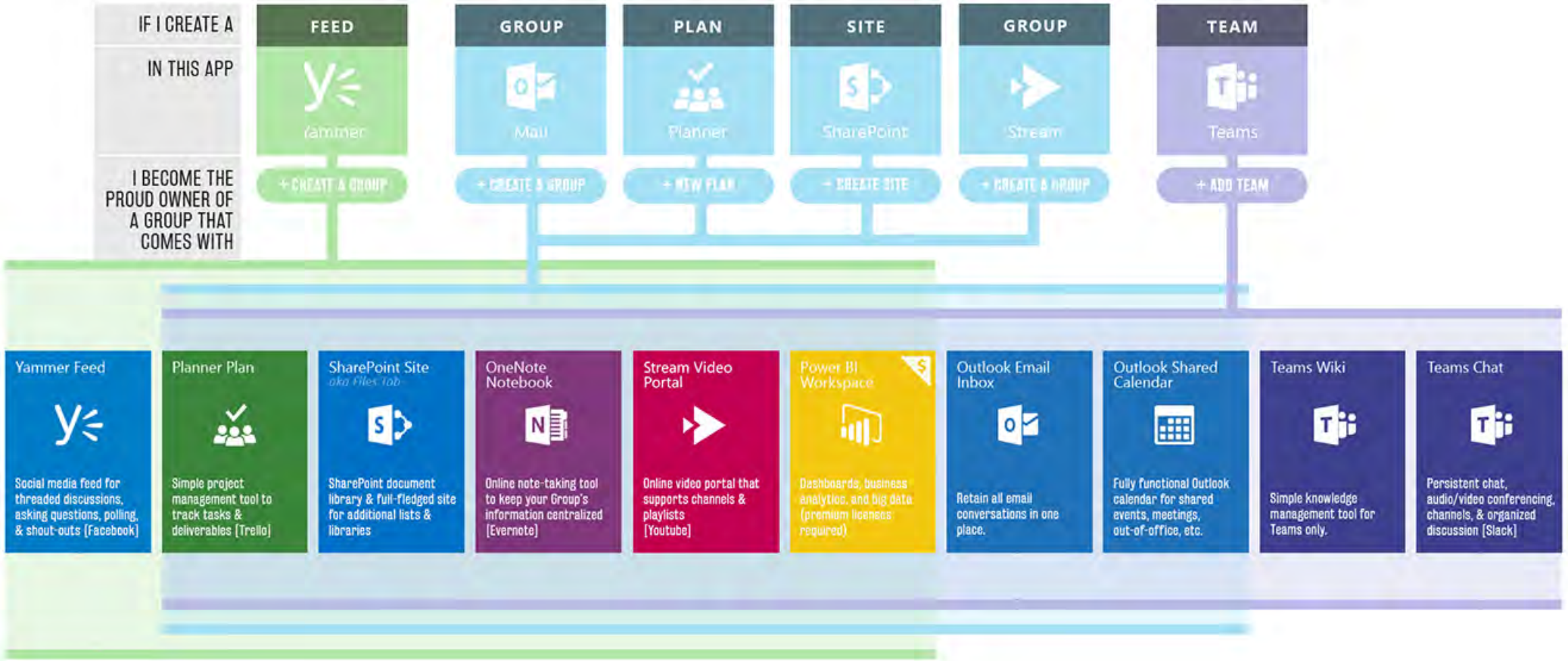
Communications Site

Team Site



envision IT
Leaders in SharePoint Solutions

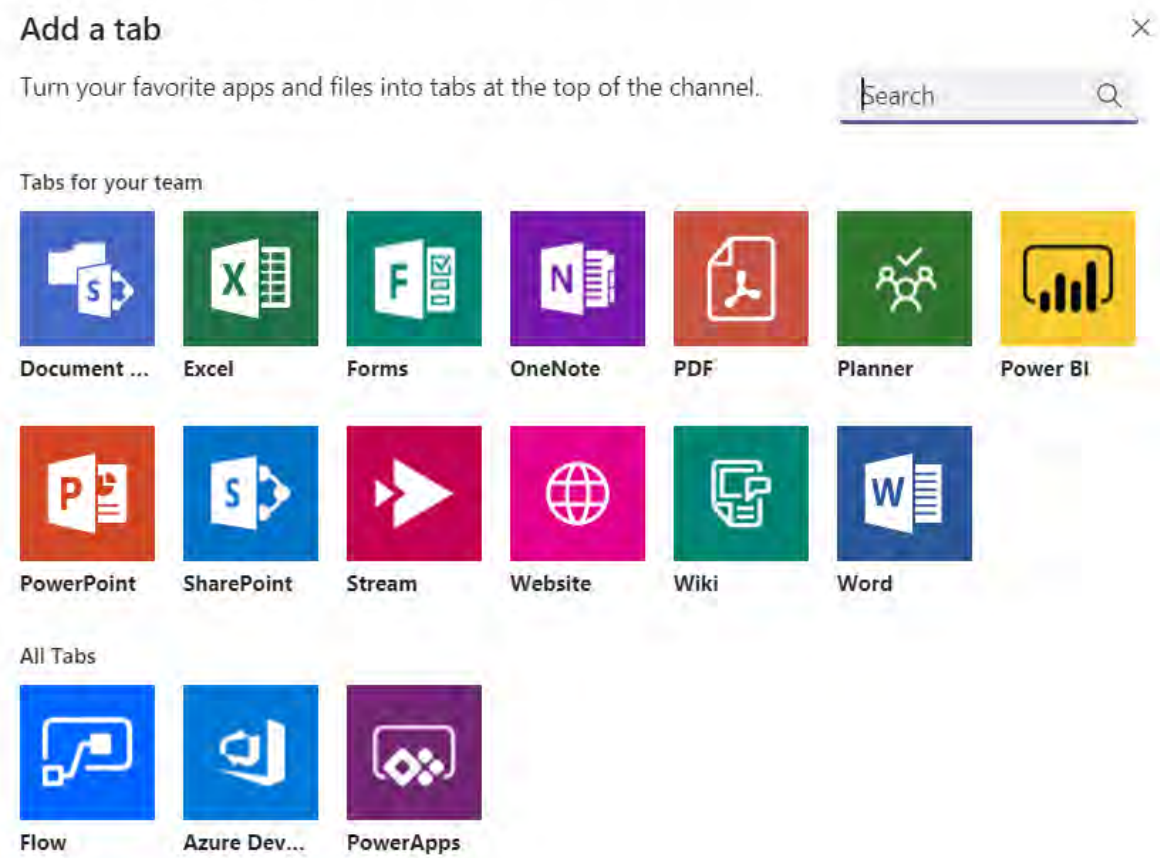
Office 365 Groups



Matt Wade - http://icansharepoint.com/everyday-guide-office-365-groups/

Microsoft Teams

- Each Team may have multiple channels, with tabs to SharePoint lists and libraries, Stream, Planner, OneNote, and many others



Conversation and Collaboration Modes

Type	Example	Try this …
Quick, transitive, low importance	“Want to grab a sandwich?	
Making decisions, group think	"Which sandwich shop should we order from for the department from now on?"	
External, formal	“We’d like to work on a sandwich with you.”	
Seeking help, crowdsourcing	“Who knows about sandwiches?”	
Strategic	“NDA: We’re planning to start a sandwiches division.”	
Informational, inspirational	“We see that sandwiches are trending up.”	
Personal, confidential	“We’re firing the sandwich guy – YOU!”	

Susan Hanley – Ignite 2017 – THR2059

Conversation and Collaboration Modes – Envision IT

Type	Example	Try this …
Quick, transitive, low importance	"Want to grab a sandwich?	
Making decisions, group think	"Which sandwich shop should we order from for the department from now on?"	
External, formal	"We'd like to work on a sandwich with you."	
Seeking help, crowdsourcing	"Who knows about sandwiches?"	
Strategic	"NDA: We're planning to start a sandwiches division."	
Informational, inspirational	"We see that sandwiches are trending up."	
Personal, confidential	"We're firing the sandwich guy – YOU!"	

Susan Hanley – Ignite 2017 – THR2059

Search

Decreasing **attention span**

59%
Managers missing information daily

20%
Time spent looking for the right information

Accelerating **content scale**

44 zettabytes of data (2020)

>76% unstructured data (2020)

104 quadrillion average Office docs (2020)

169 billion standard content DBs (2020)

1 zettabyte = 1B terabytes

The world is **investing** in intelligent tech

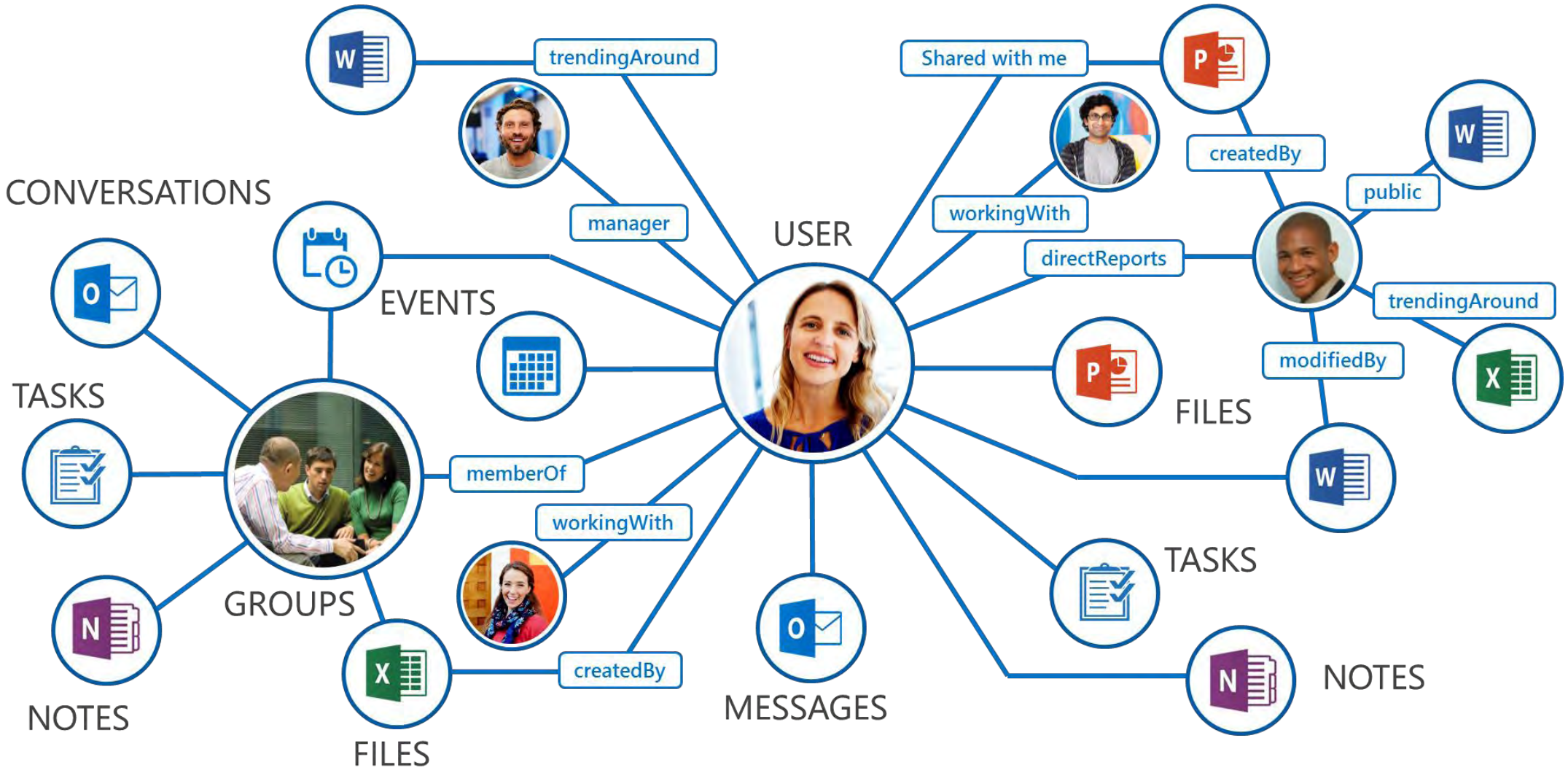
$5B Machine Learning (2016)

$3B Computer Vision (2016)

$1B Natural Language (2016)

VC investment in AI companies in 2016

Office Graph



Current Search Experiences

Classic

- Site
- List or library
- Search verticals – default and custom
- Custom refiners

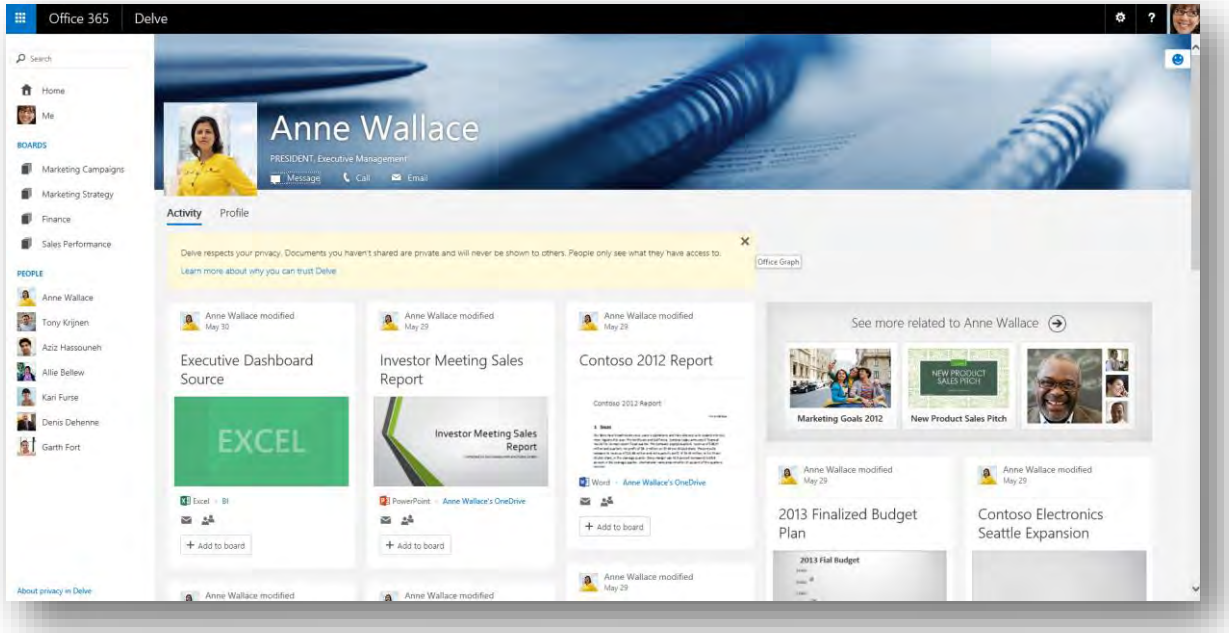
Modern

- Site
- Hub
- Defined search verticals
- Defined refiners

Other

- Office.com
- Bing.com

Delve



- Powered by the Office Graph
  - Collects signals of activities people are doing
- Drives information discovery through your connections to other people
- Machine intelligence
- Auto builds profile pages

in Bing
in Office.com
in SharePoint
in Edge
in Windows

Microsoft Search

in PowerPoint
in Outlook
in Excel
in Yammer
in Word
in Sway
in Teams
in OneNote

One capability.
Every search experience.

Microsoft Graph + Bing technology

Next Gen Search Relevancy

Personalization: Understand what matters to you

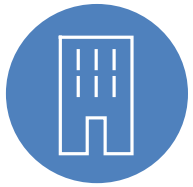
Using signals from across Microsoft 365

Me

Is the content related to projects me or my collaborators are involved in?

My role

Is content created for people similar to me, based on role/location/org?



My org

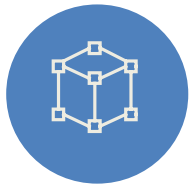
Is the content authoritative / official? Does it represent the knowledge of organization?

Intent: Understand what you want to do right now

Using tech transfer from internet consumer search

Guidance

Get suggestions as you type to help you express your intent, and minimize your effort.



Semantic matching

Get the correct result without having to remember or guess the 'correct' query term.

Beyond a list of results

Get the *meaning* of an acronym, instead of links to where it's used.

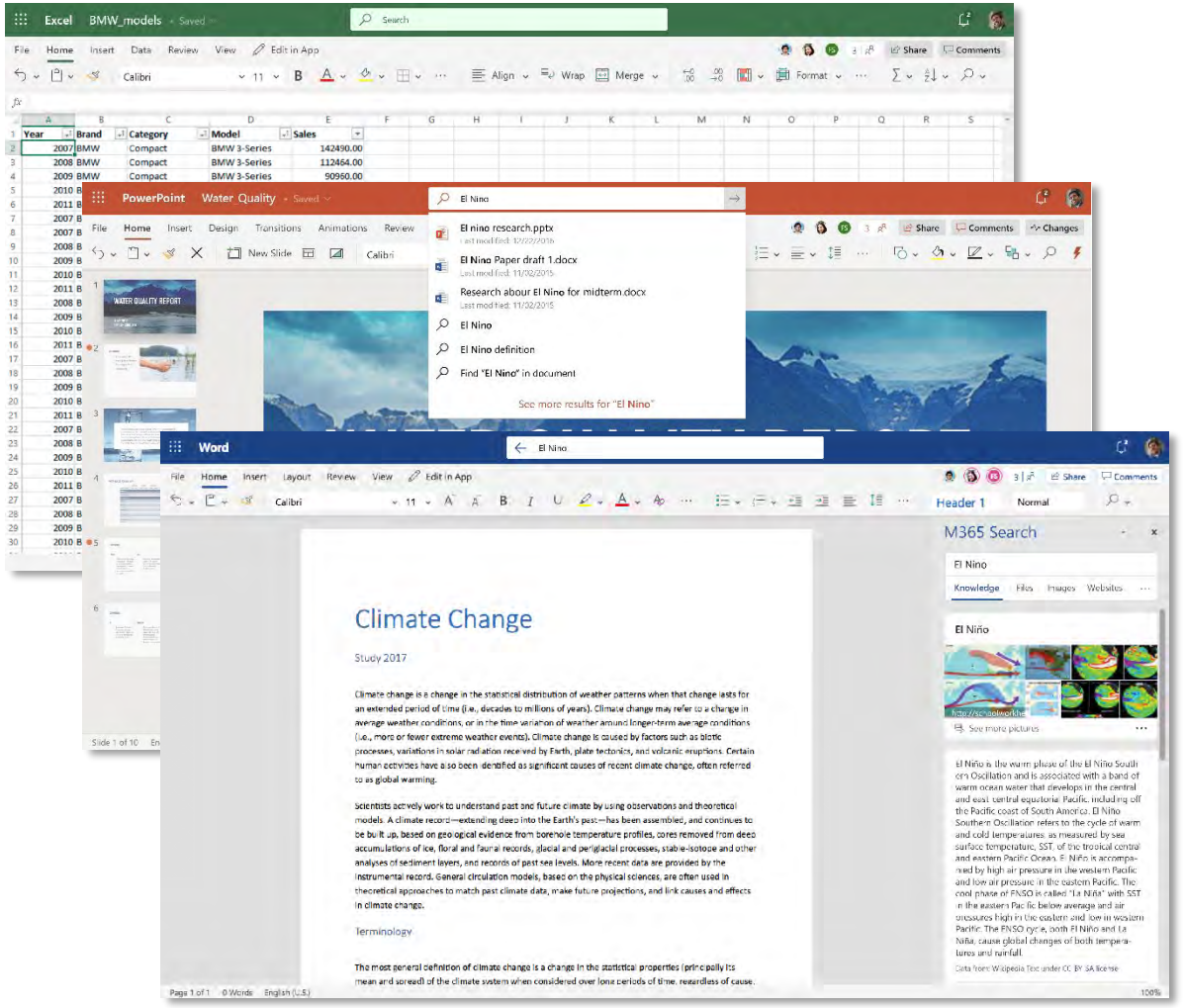
Get your work done faster with the power of search

Search in Office Apps

Search in Office - Delivers relevant results in apps like Word, Excel, and PowerPoint

Get work done - Find actions, services, and content that help you to complete your task

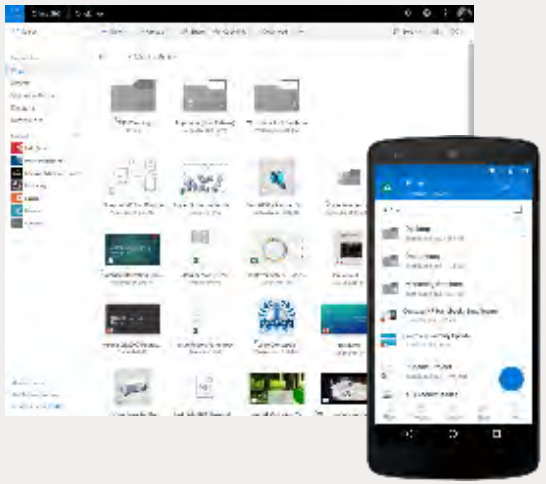
No more context switching - Bring the power of Office and the Web to you in the app without needing to switch apps



SharePoint
Online

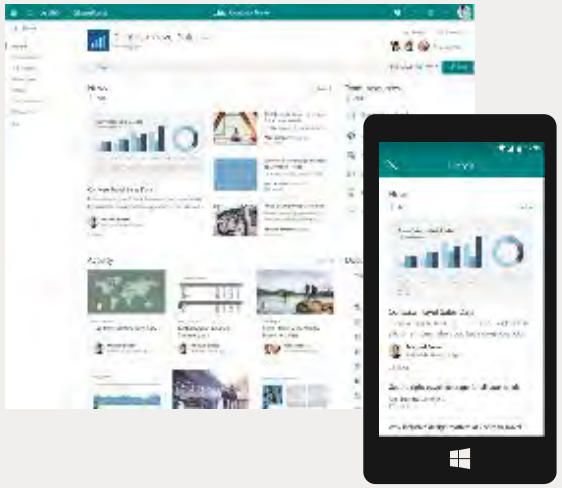
Three places to work

OneDrive for Business



Private by default

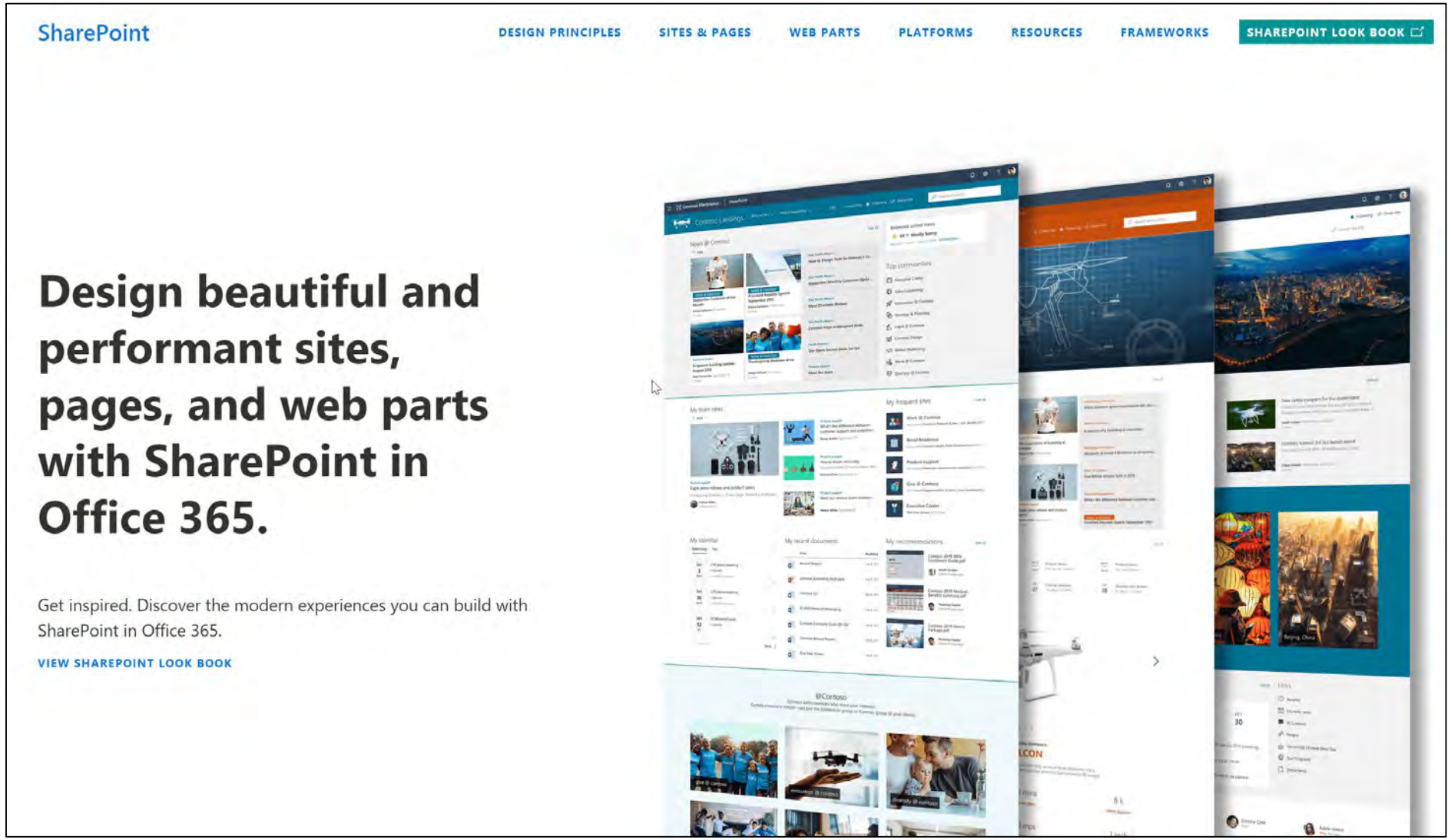
Team sites



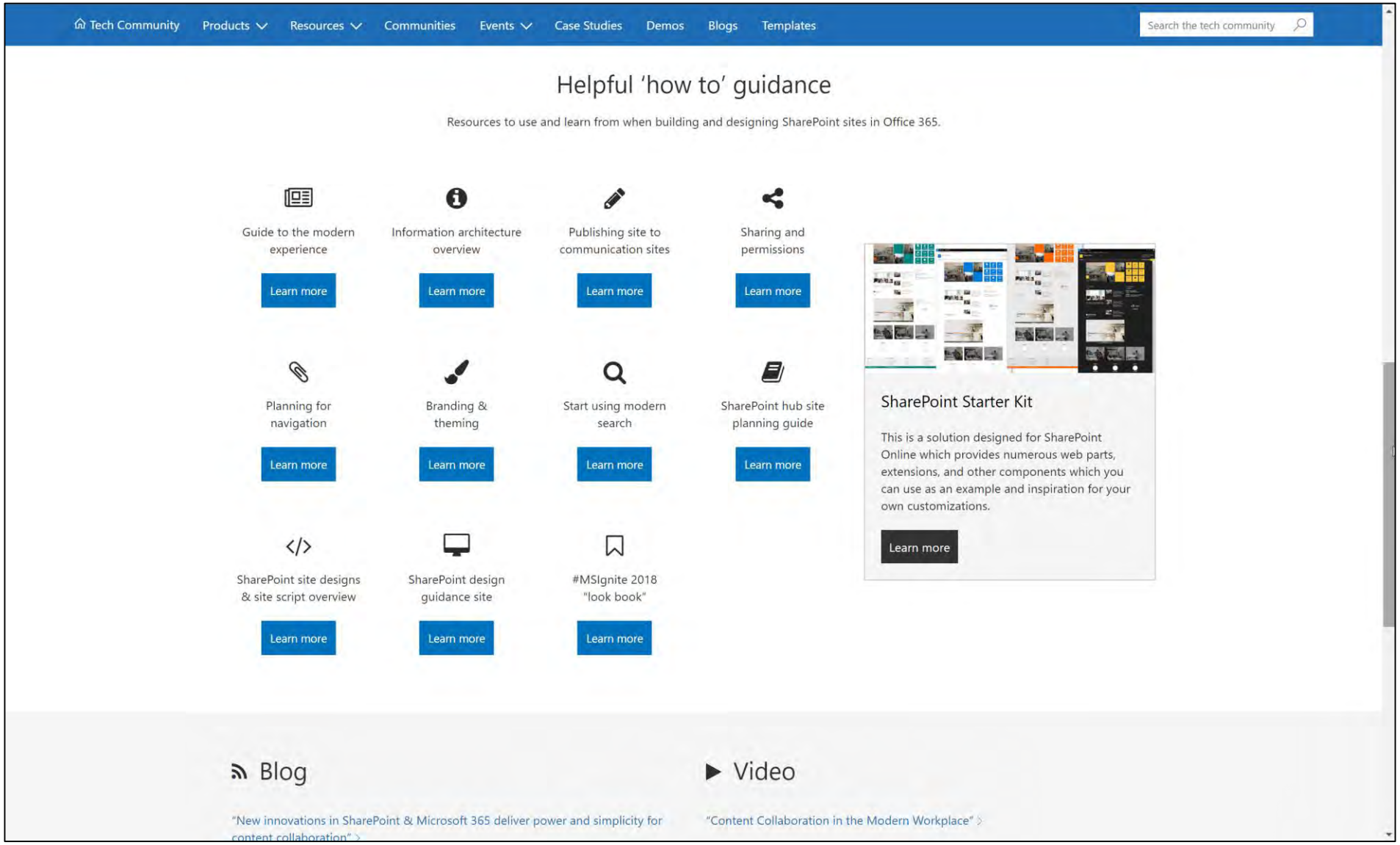
Share content with your group

Communication sites

Inform and engage a broader audience

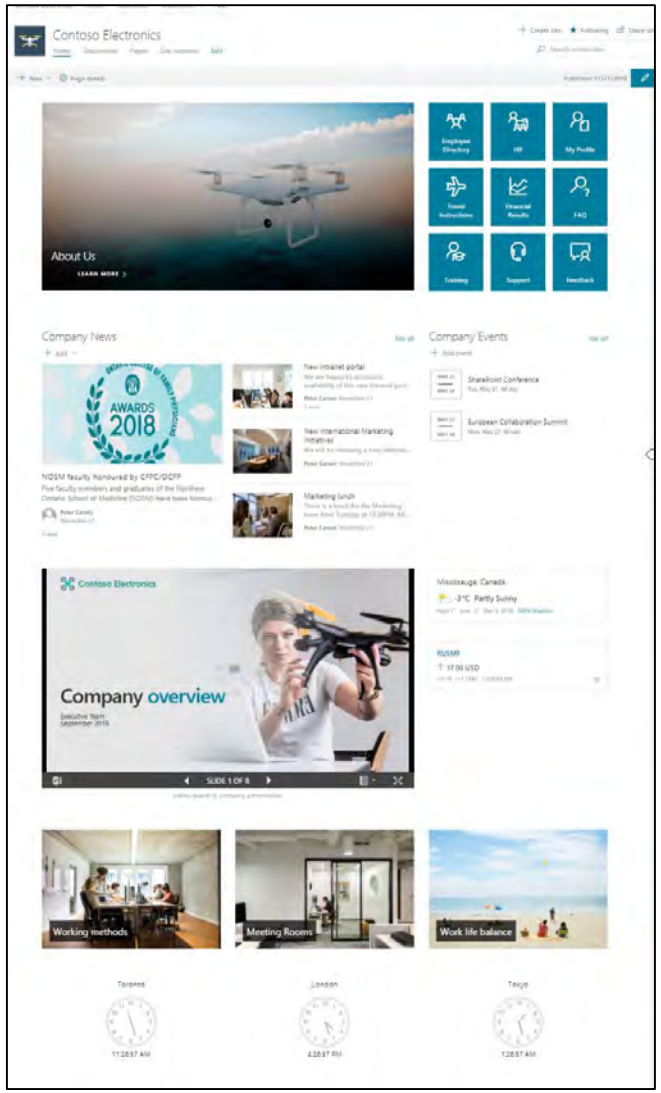


https://spdesign.azurewebsites.net/



https://resources.techcommunity.microsoft.com/resources/build-modern-intranet-on-sharepoint-office-365/

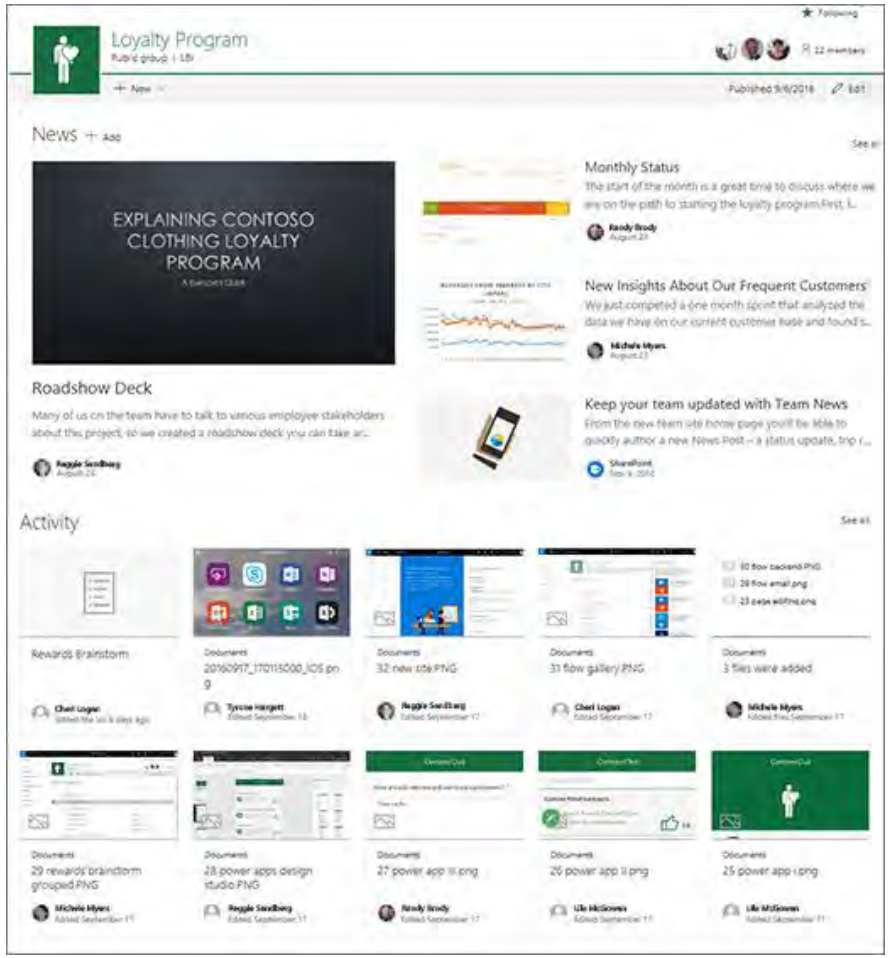
SharePoint Starter Kit



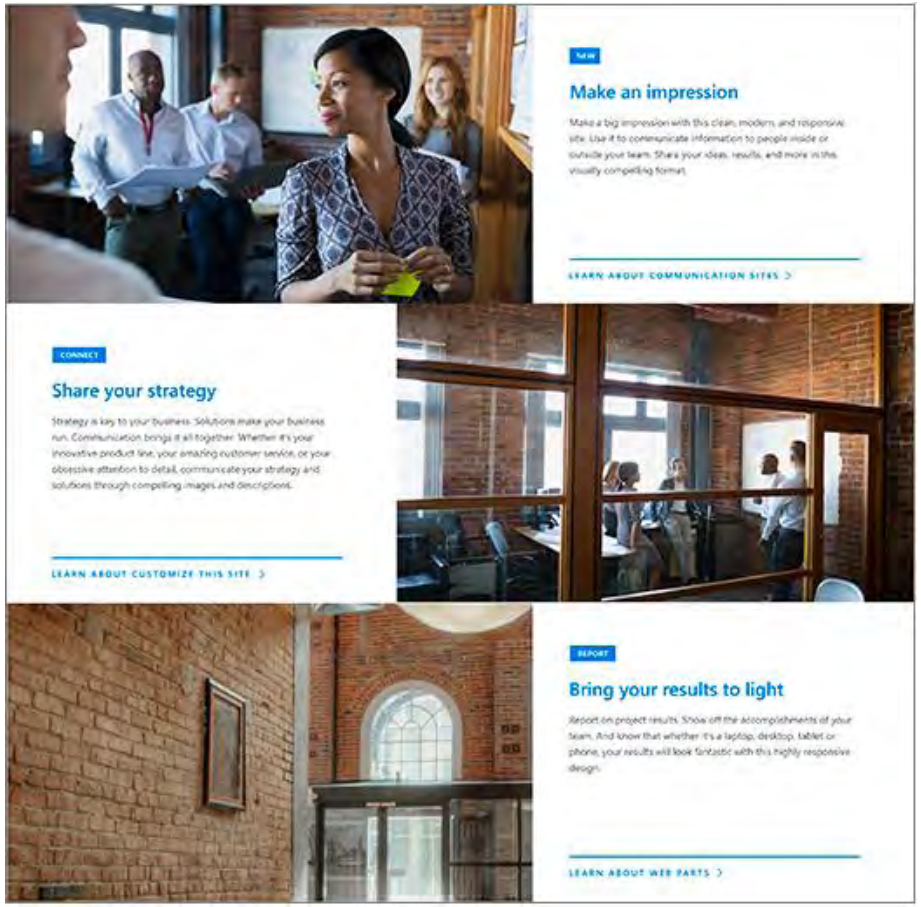
https://github.com/SharePoint/sp-starter-kit

SharePoint – Team Sites

- By default, all members are content authors
- Department, Committee, or Project Collaboration
- External Sharing with Clients, Vendors, or Partners
- Collaboration-focused

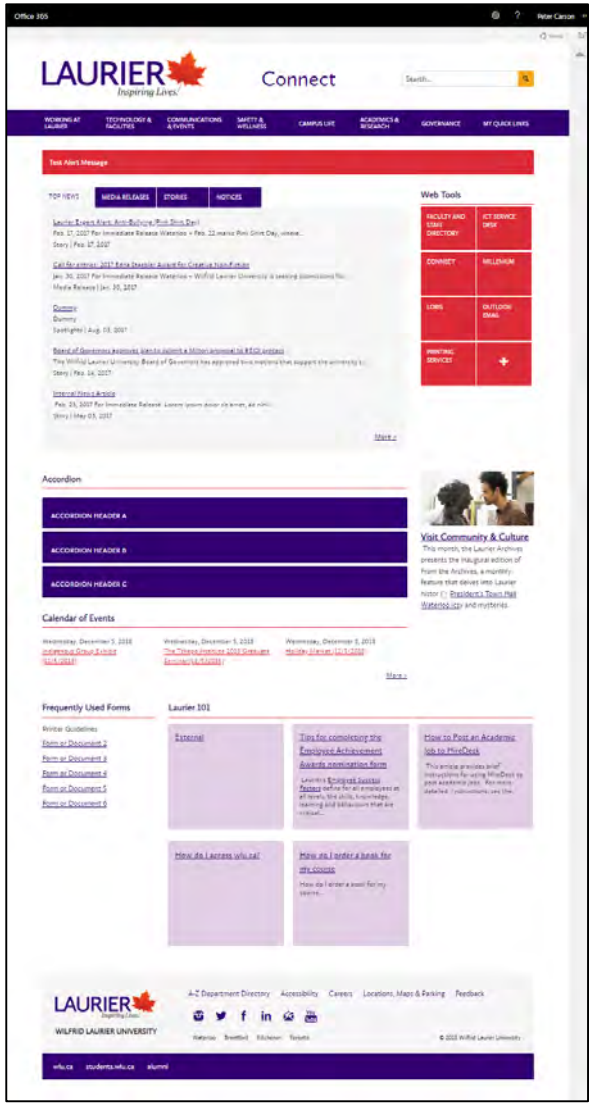


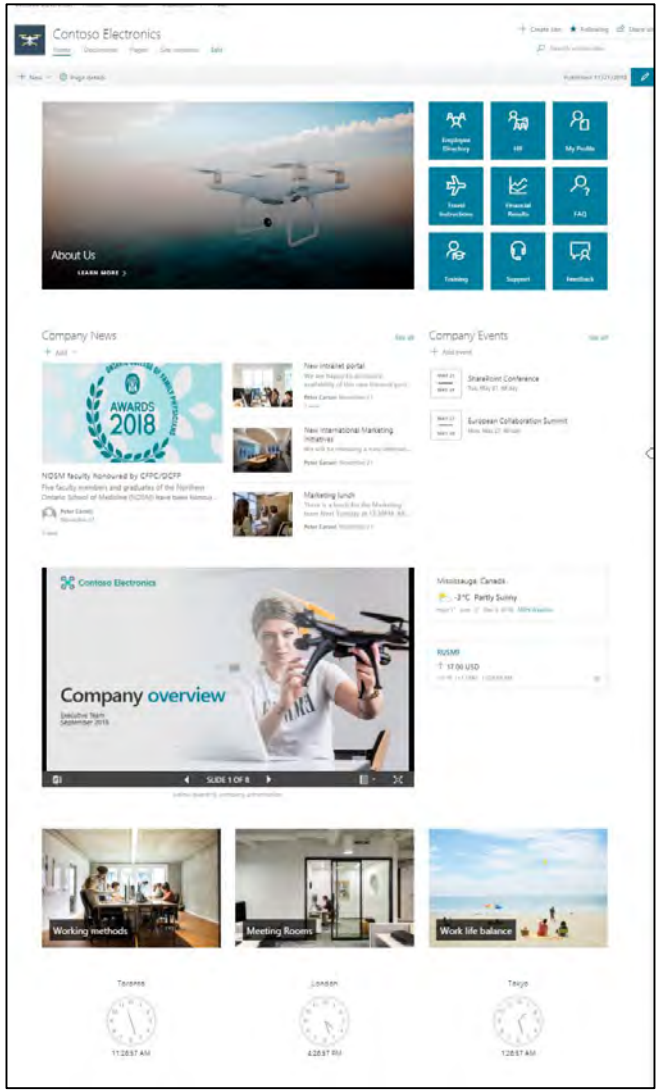
Communications Sites



- Hero Webpart for highlighting important Content
- Sharing of News & Events
- Showcase Images & Photos

Classic vs. Modern





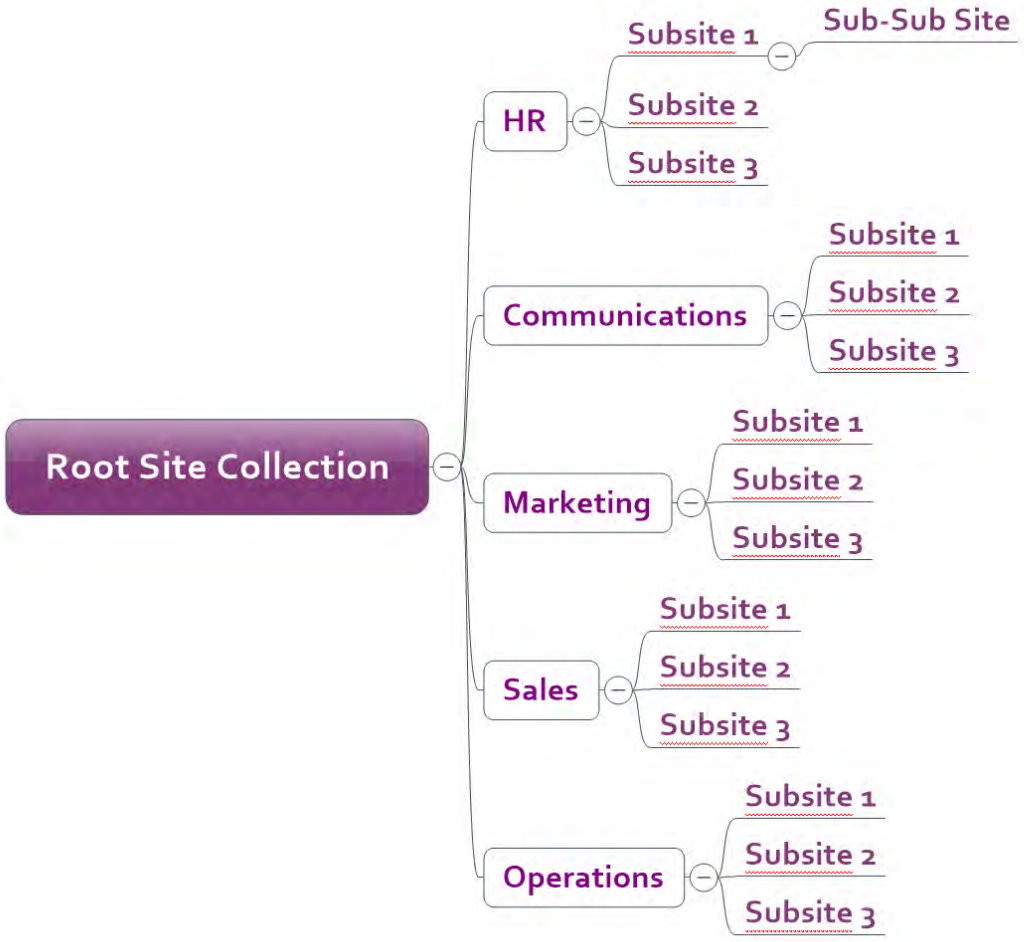
Information Architecture

- Even with a good plan, information architecture is a continual process
- No more site/sub-site – new flat structure where all sites are site collections
  - Modern subsites are now supported
- Hub Sites create a group of sites that share navigation, branding and other elements.

Planning Permissions

- SharePoint Groups
- O365 Groups
- Azure Active Directory Groups

Classic vs. Modern IA



SharePoint Hub Sites

- Shared navigation and brand
- Roll-up of content and search
- A home destination for the hub
- Can be Team or Communications
- Associated Sites are “subsites”

VALO
Ready-to-go Modern Intranet

envision IT
Leaders in SharePoint Solutions

Award-wining Digital Workplace solution on O365 & SharePoint

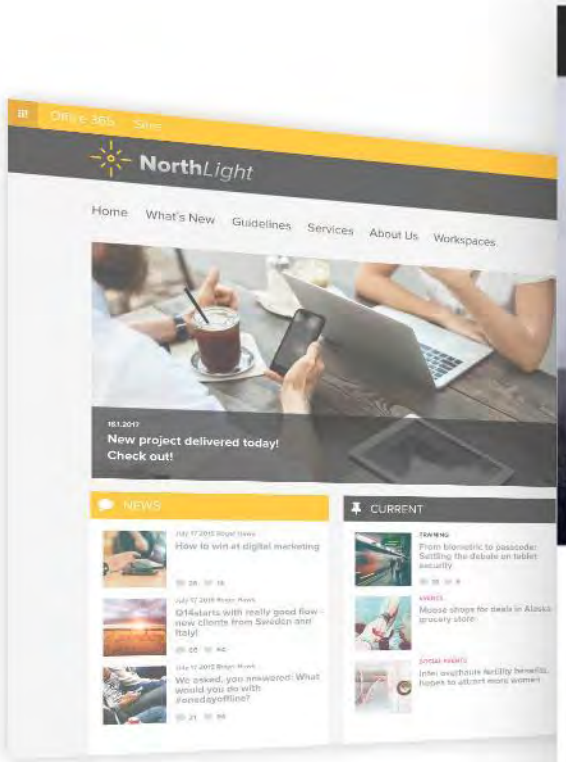
- Centre of all communication, social and teamwork in your organization
- Beautiful User Experience
- Works with any device
- You can start using it immediately
- Customizable
- Always up-to-date

Valo Intranet Features

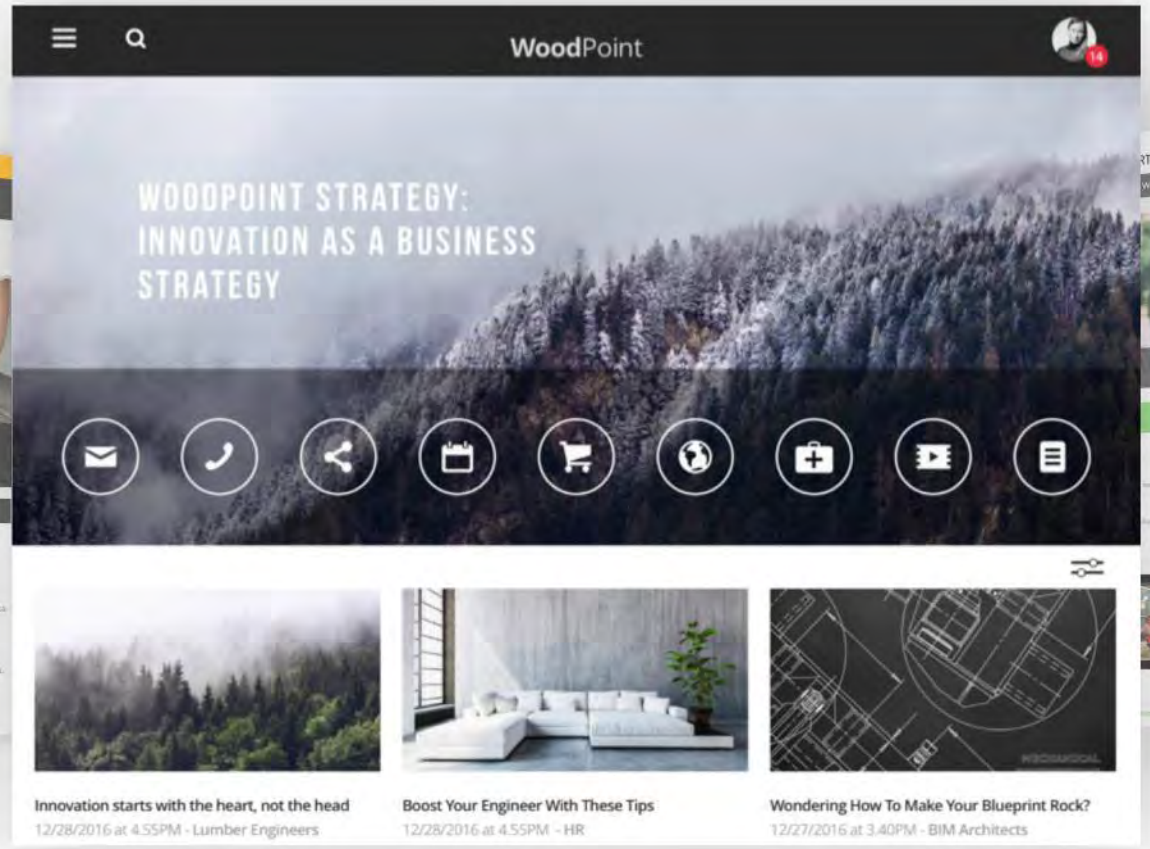
- Company News
- Content Pages
- Mega Menu
- Quick Links
- My Tools
- Events
- People & Expertise Finder
- Social Hub
- Latest Videos
- Discussion Feeds
- Yammer Praises and Announcements
- Delve Blogs
- Surveys
- Forms
- FAQ
- Open Job Positions
- Classifieds
- Admin Toolpack
- World Clock
- Multilingual

3 ready-made intranet themes

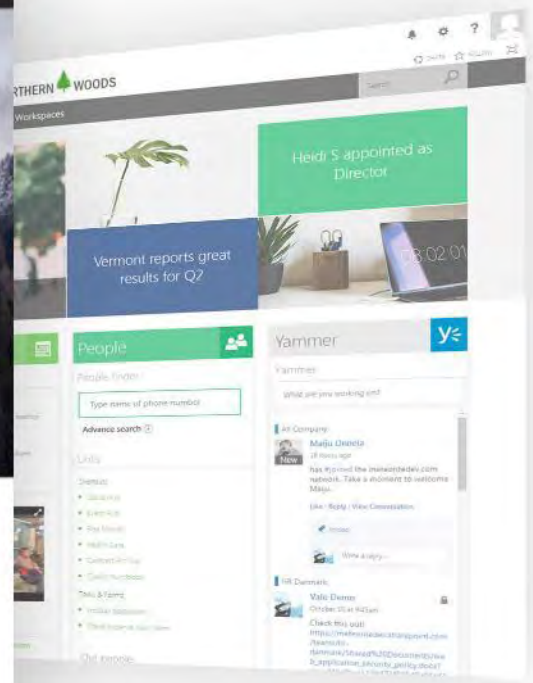
Valo



Lux



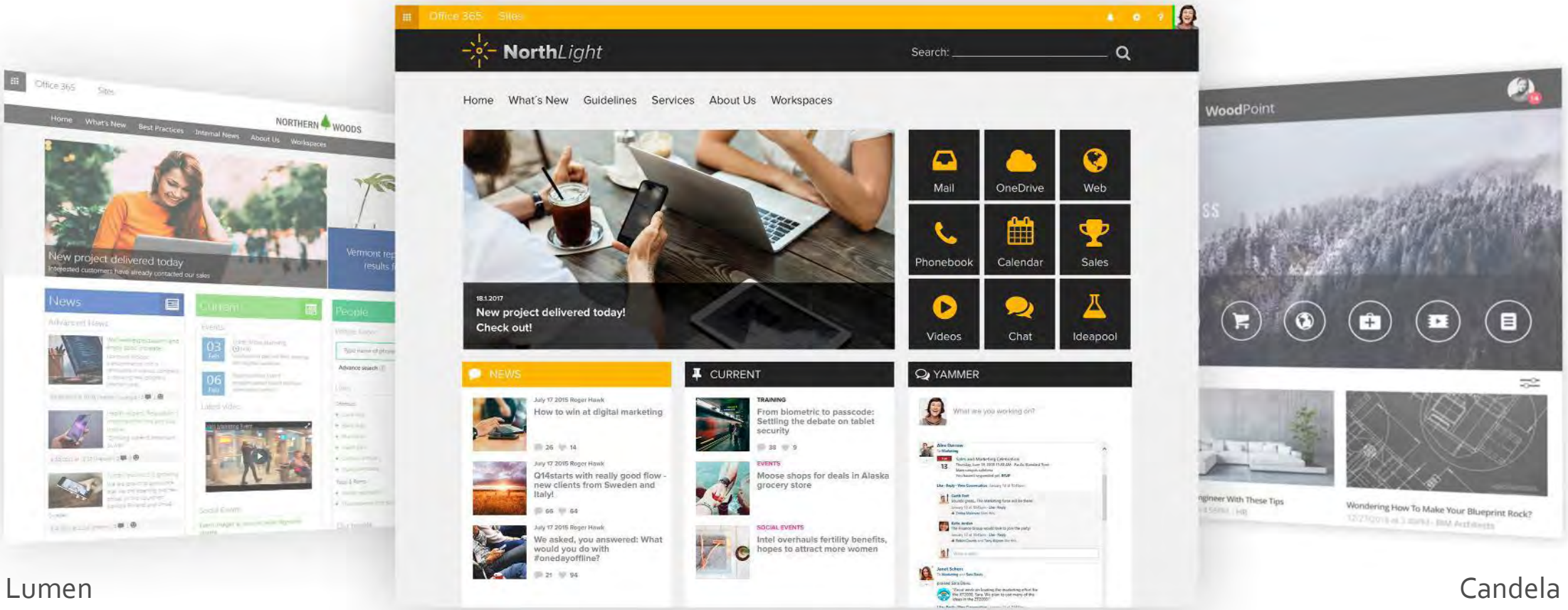
Candela



Lumen

3 ready-made intranet themes

Valo



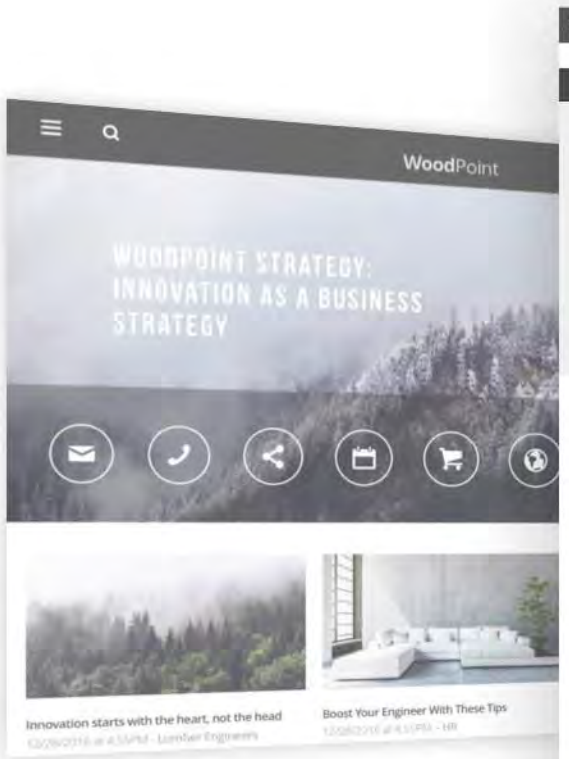
Lumen

Lux

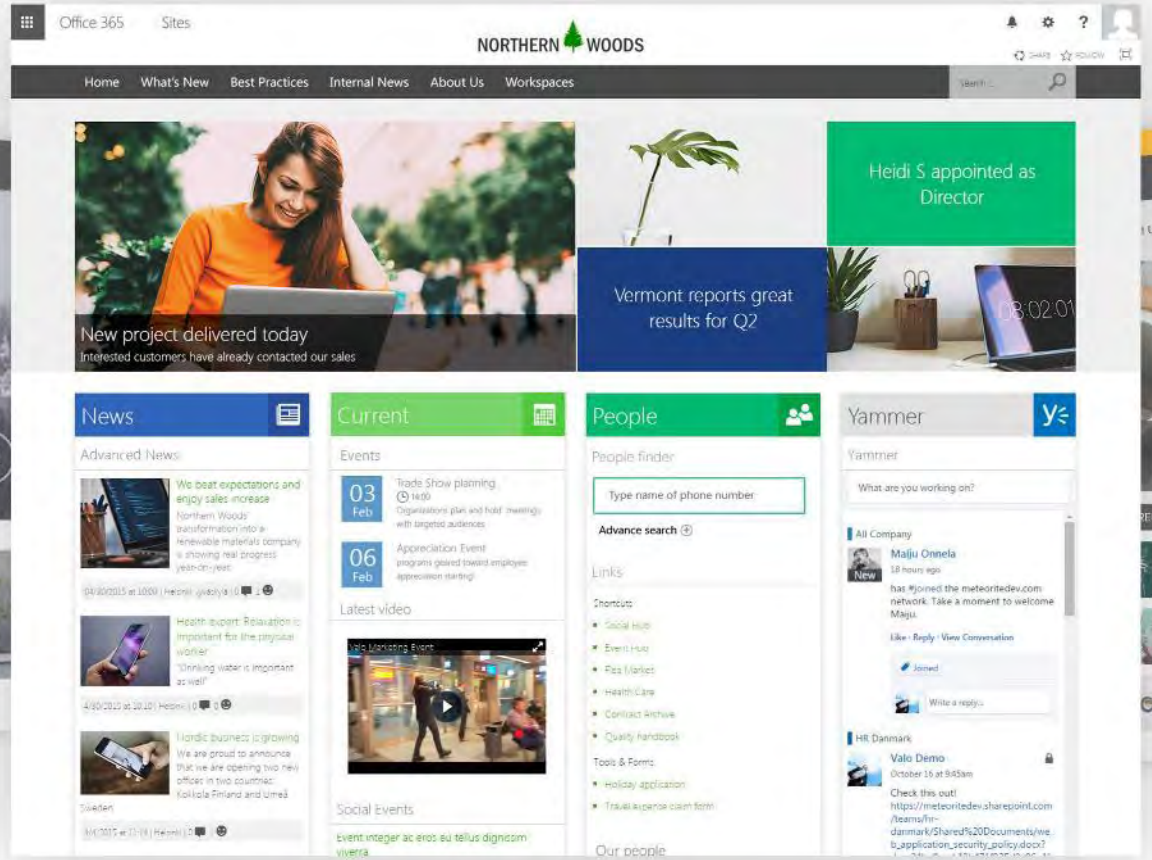
Candela

3 ready-made intranet themes

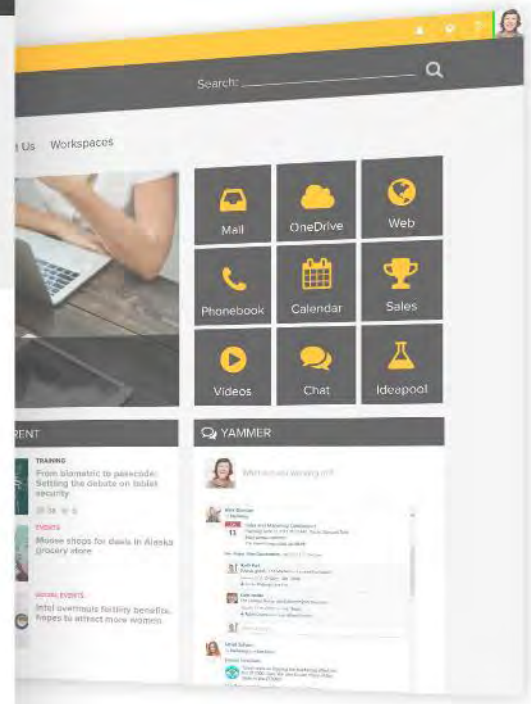
Valo



Candela



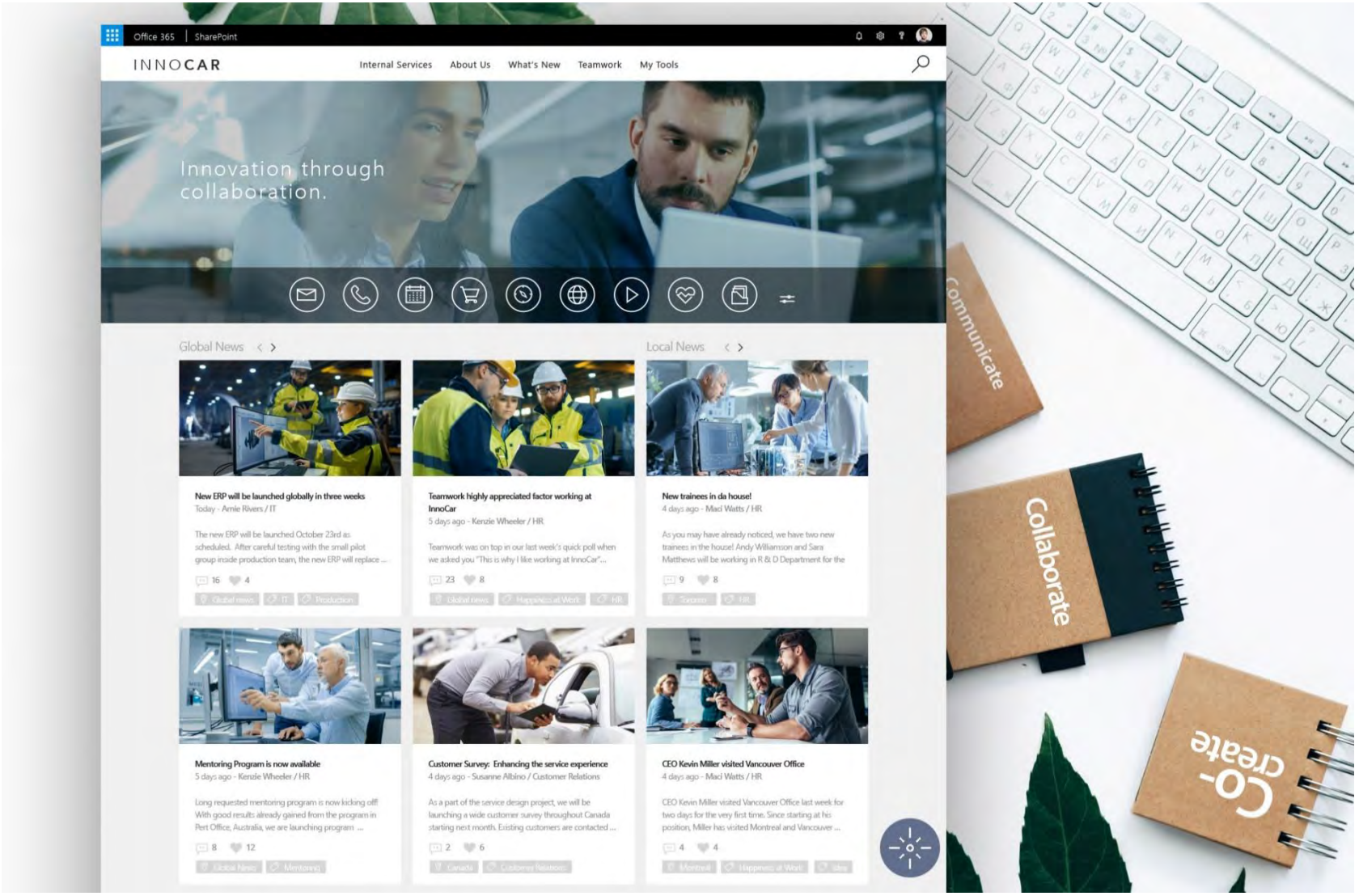
Lumen



Lux

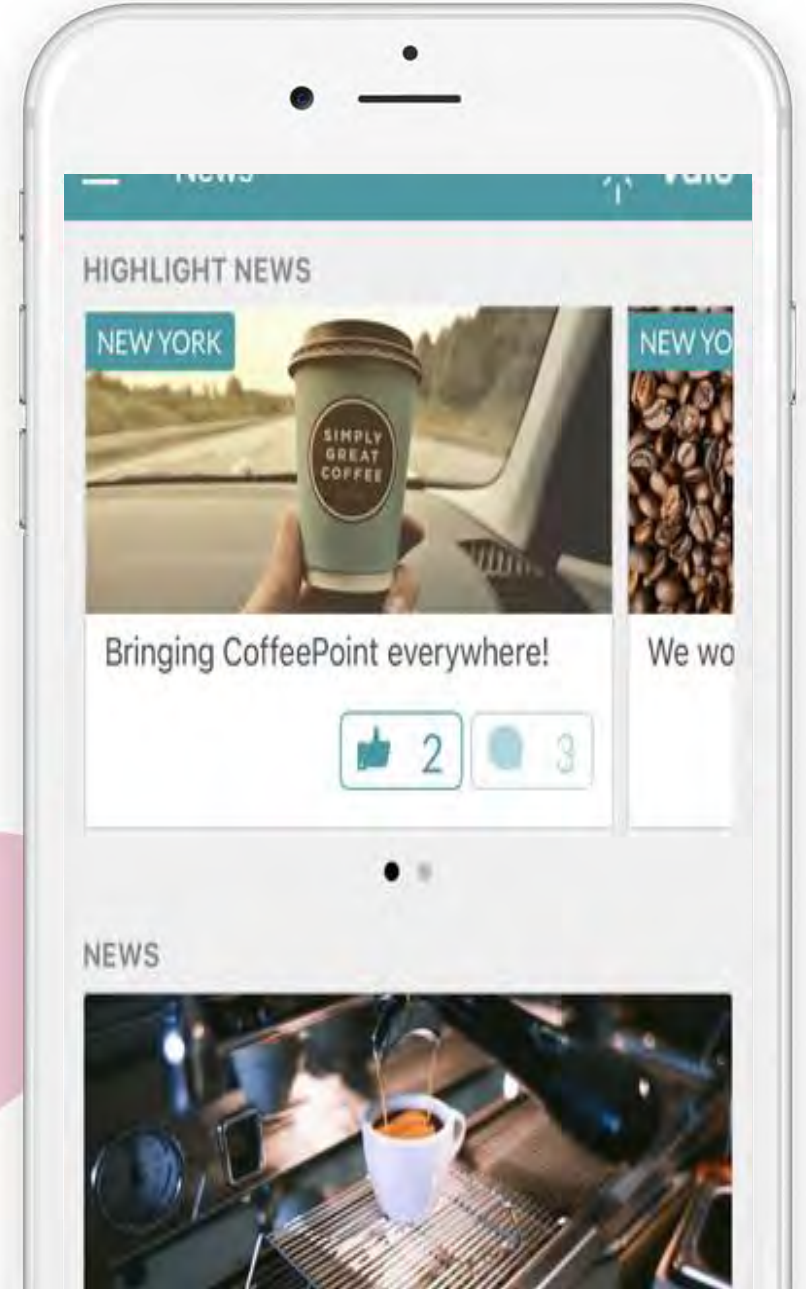
Custom Themes

Valo Modern


Office 365
SharePoint
INNOCAR
Internal Services
About Us
What's New
Teamwork
My Tools
Innovation through collaboration.
Global News
Local News
New ERP will be launched globally in three weeks
Today - Arnie Rivers / IT
Teamwork highly appreciated factor working at InnoCar
5 days ago - Kenzie Wheeler / HR
New trainees in da house!
4 days ago - Mad Watts / HR
Mentoring Program is now available
5 days ago - Kenzie Wheeler / HR
Customer Survey: Enhancing the service experience
4 days ago - Susanne Albino / Customer Relations
CEO Kevin Miller visited Vancouver Office
4 days ago - Mad Watts / HR
Communicate
Collaborate
Co-create

The Best Mobile Intranet Experience

- Native Valo Intranet Mobile App for Android and iPhone
- Supports push notifications and branding
- All ready-made themes are responsive for the full mobile intranet experience
- Valo fully supports Microsoft apps available for Yammer, SharePoint, OneDrive, Office…



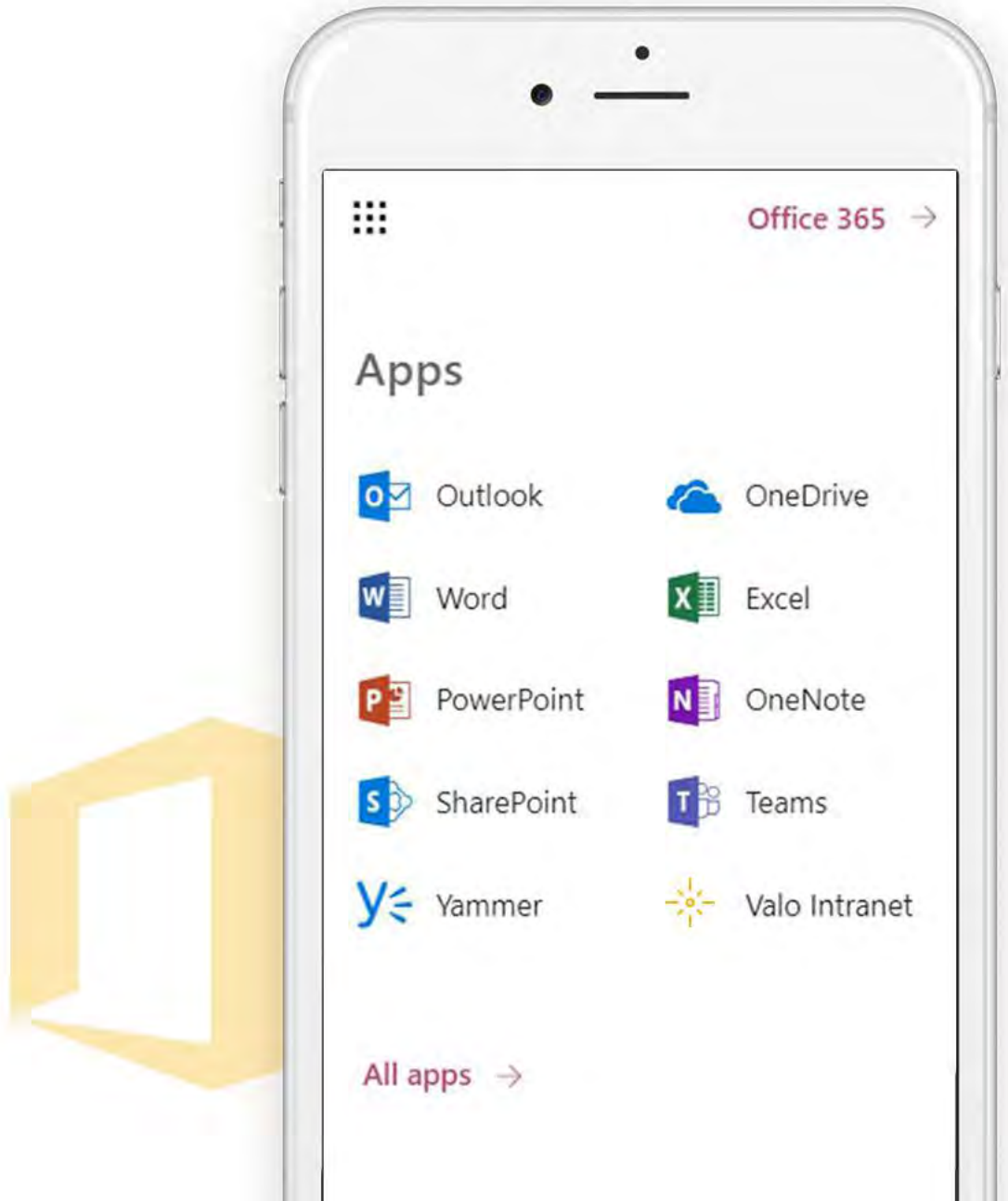
Available on the iPhone App Store

ANDROID APP ON Google play

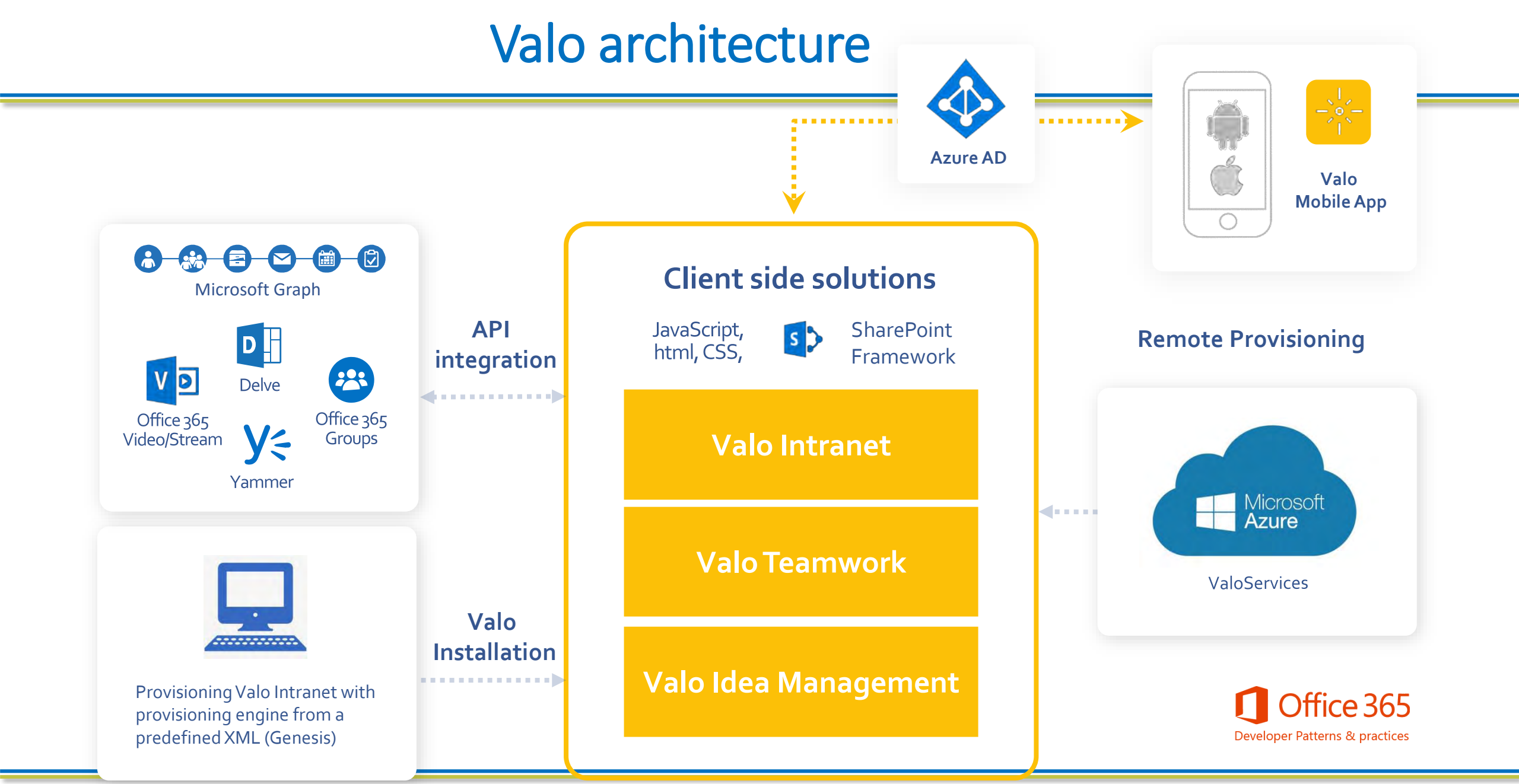
100% compatible with

Office 365

Also available for on premises SharePoint Server 2016/2019



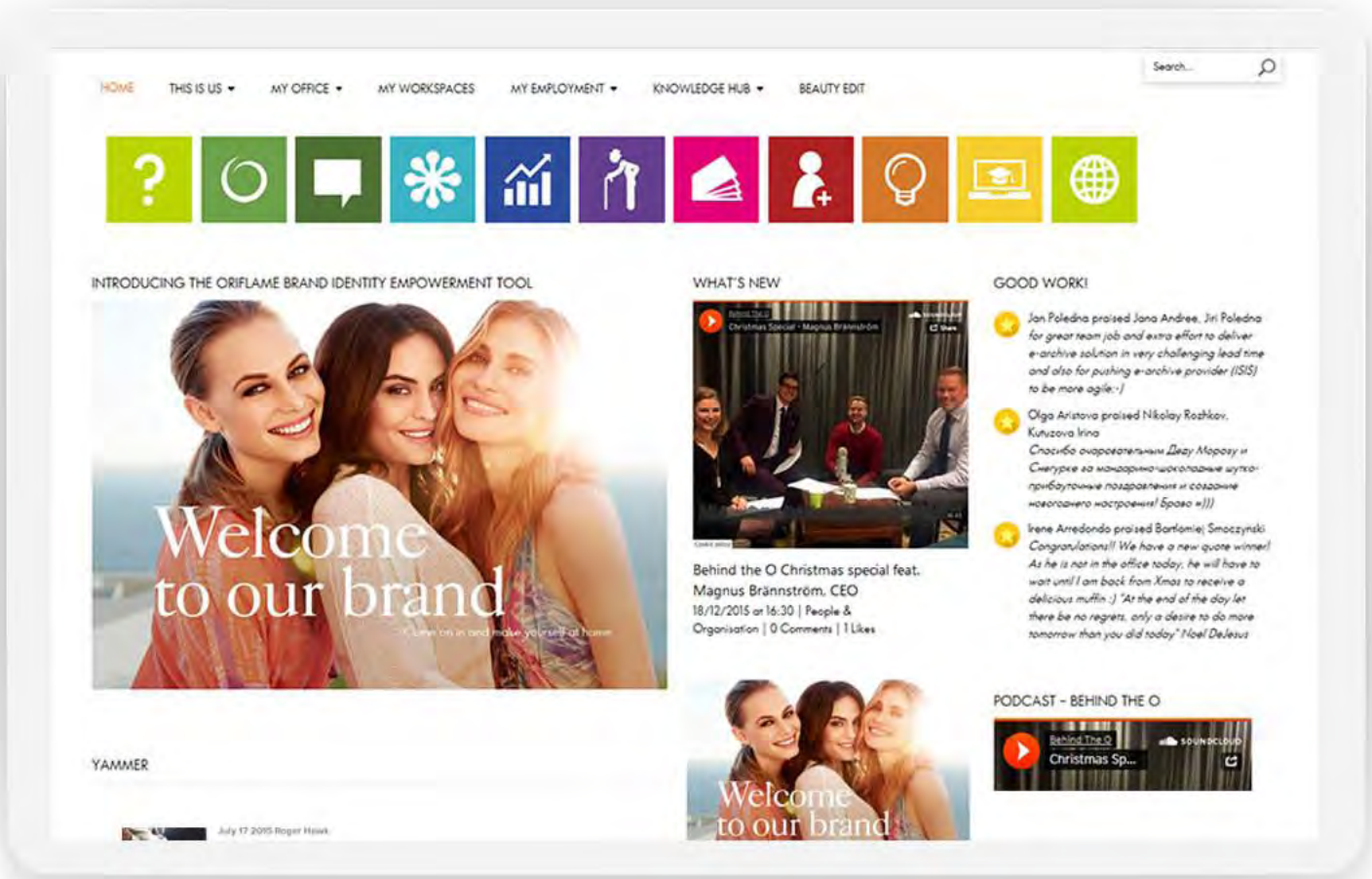
Valo architecture



On premises SharePoint 2013, 2016 and 2019 supported with limitations

CASE:

Oriflame

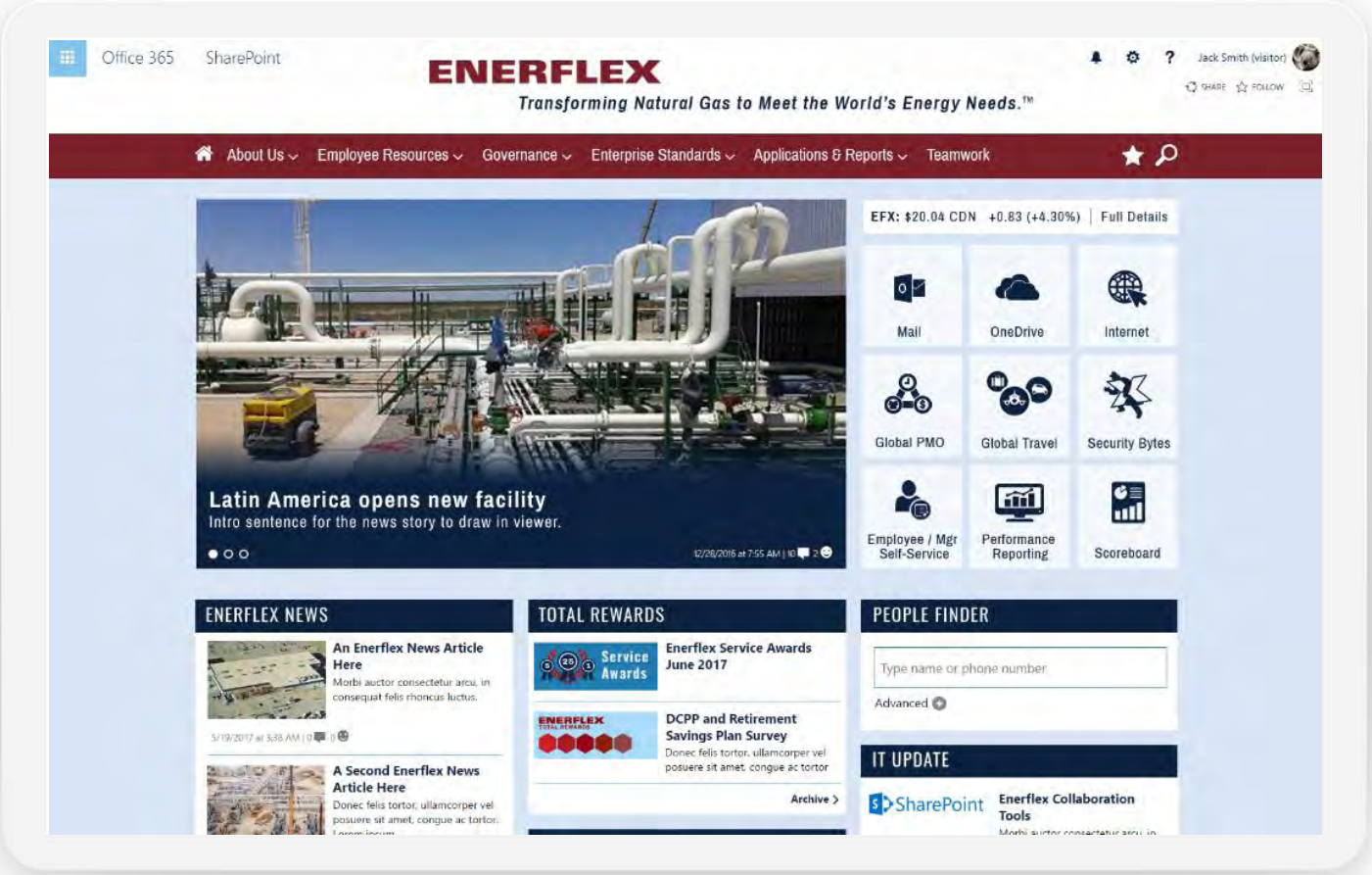


CASE:

Enerflex

"Valo proved to be a solid product. We appreciate that Blue Meteorite constantly and proactively updates Valo to keep up with the Office 365's fast pace evolution."

Mina Gould, Application Development Manager, Enerflex

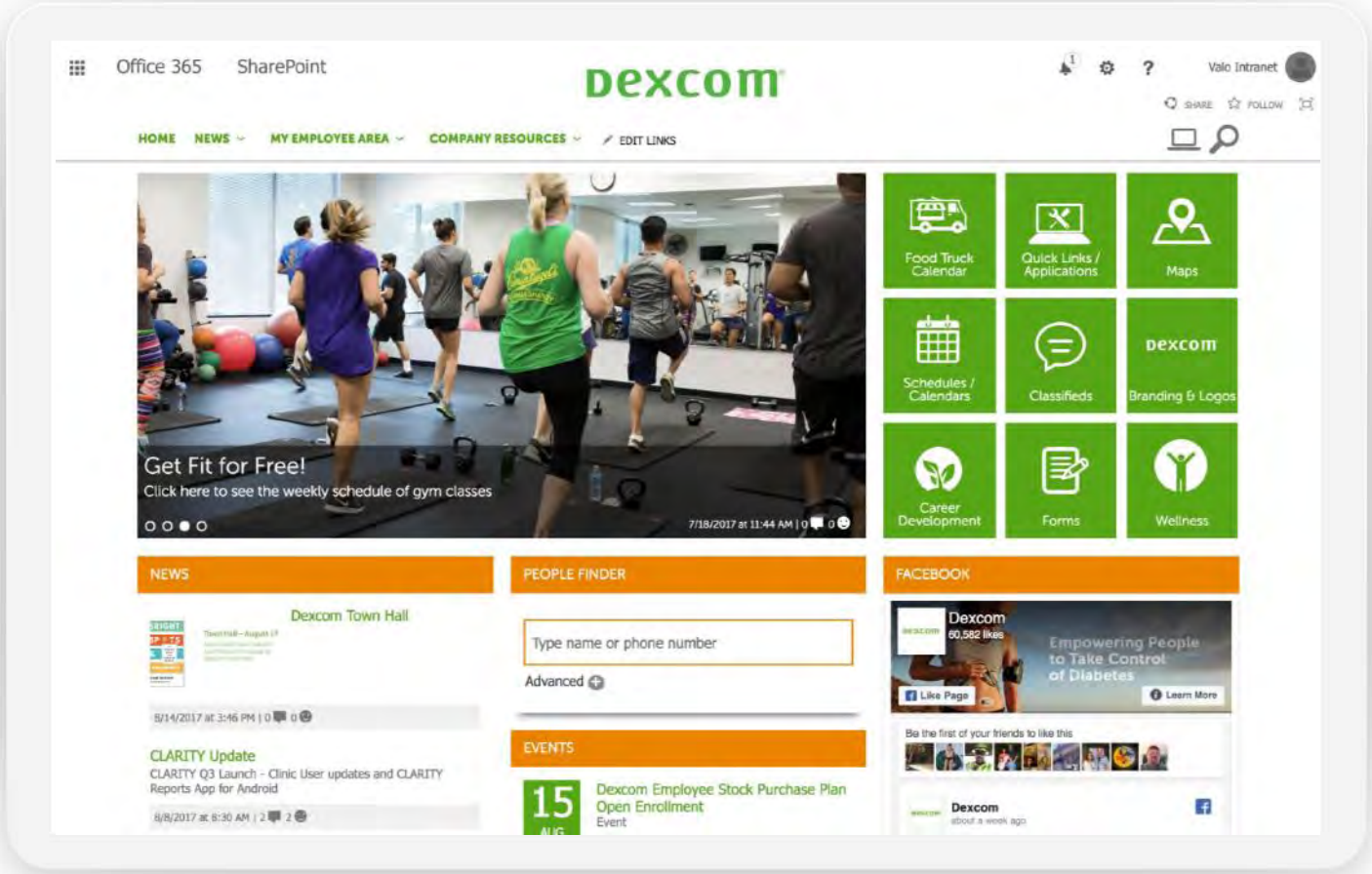


CASE:

Dexcom

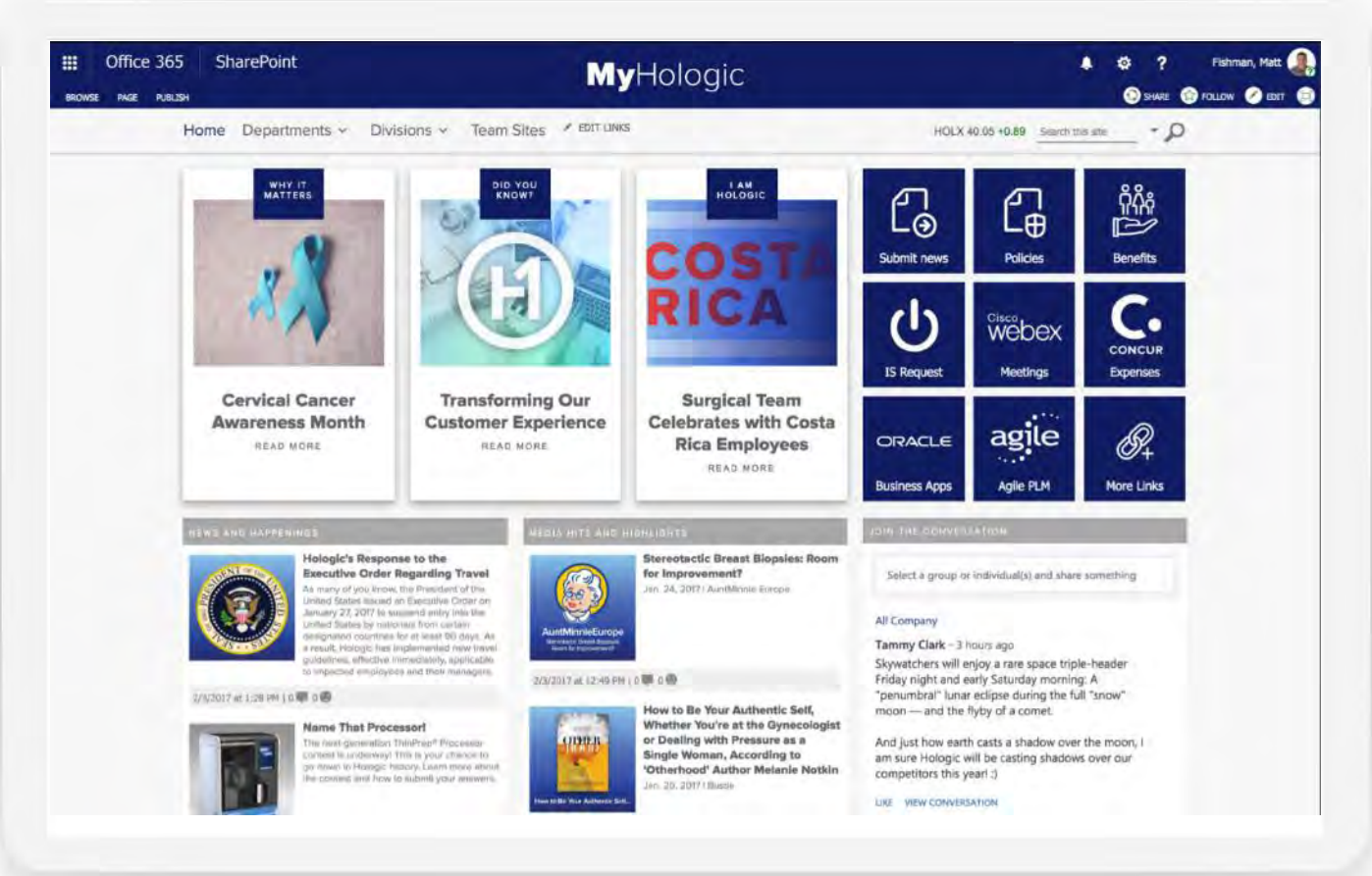
"Employees now have anytime, and any device access to all their work resources from intranet. It's just easy and simple and that's what resonates with our own employees."

Chad Johnston Sr.
SharePoint Administrator,
Dexcom



CASE:

Hologic

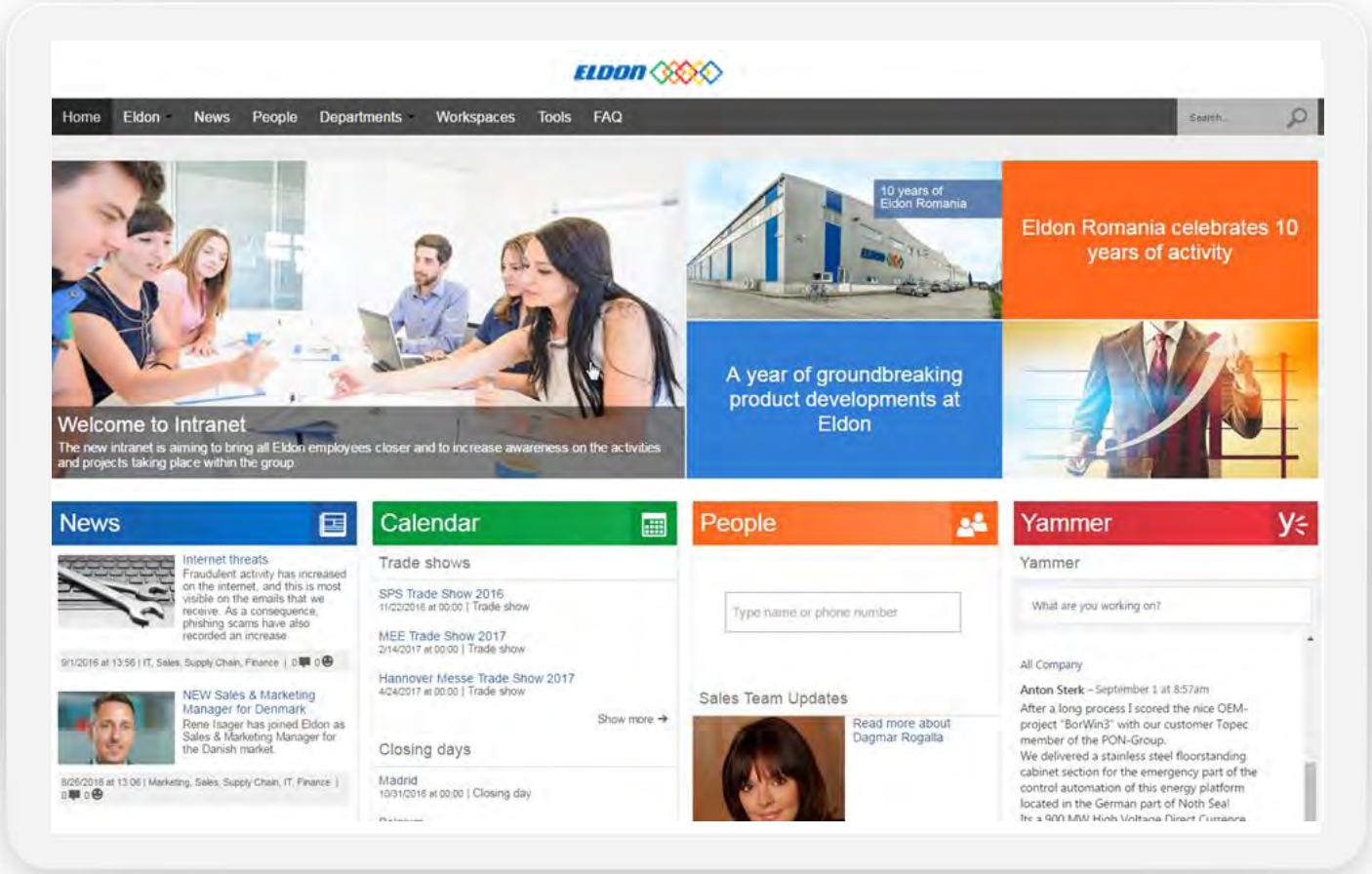


CASE:

Eldon

"Thanks to Valo Intranet's key-ready nature, we were able to launch a world-class social Intranet for our people very rapidly and with a low cost, integrating many of the great features available in the Office 365 platform."

Eduardo de Juan,
Marketing & Sales
Operations Manager, Eldon



Valo Intranet Base Package

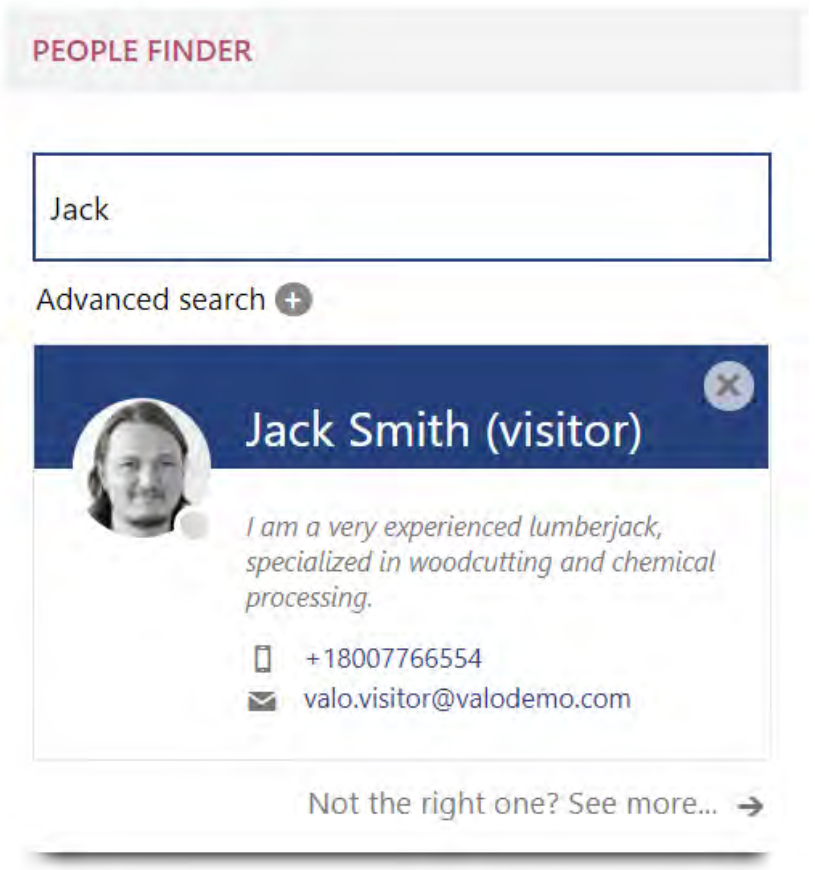
- Three visual templates: Candela, Lumen and Lux
- Mega Menu
- Responsive design
- Native Mobile App
- News with targeting
- Quick Links
- My Tools
- Alert News
- User-friendly page templates
- Survey
- Editable footer
- World Clock
- New employee presentations
- Event Calendars
- Open positions
- RSS feeds
- Discussion feeds (Yammer or Newsfeed)
- Yammer praises and announcements
- Blogs
- Wikis
- FAQ
- Classifieds
- Enhanced document metadata

+ Add-ons

- DELVE BLOGS
- SOCIAL HUB
- VIDEOS
- PEOPLE FINDER
- ADMIN TOOLPACK
- MULTILINGUAL

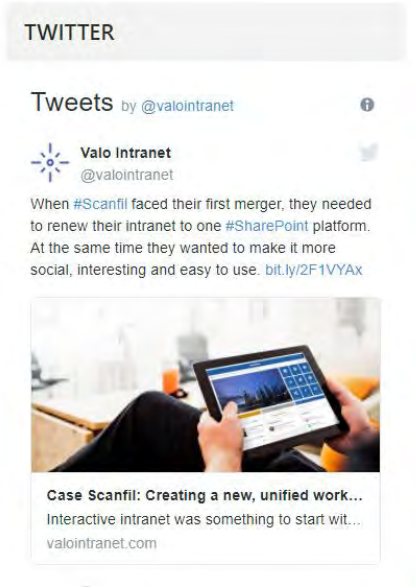
Add-on: People Finder

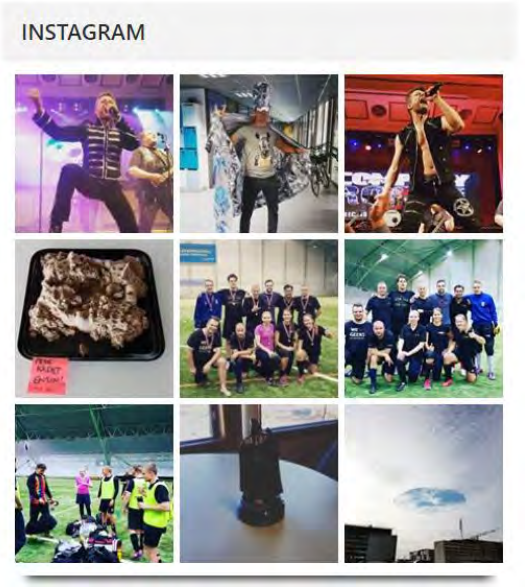
- Looking for contact information? Call from an unknown number?
- Use Valo People Finder for searching colleagues by name or phone number.
- Advanced Finder enables narrowing down the search by any additional field available in user profiles.
- Seamless integration with SharePoint's powerful People search and Delve user profiles.



Add-on: Social Hub

- Social Hub makes it easy for you to follow what people are talking about your organization in social media
- Supported channels:
- Blog (WordPress, Blogger, and Tumbler)
- Facebook
- Instagram
- Pinterest
- SlideShare
- Twitter
- Vimeo
- YouTube

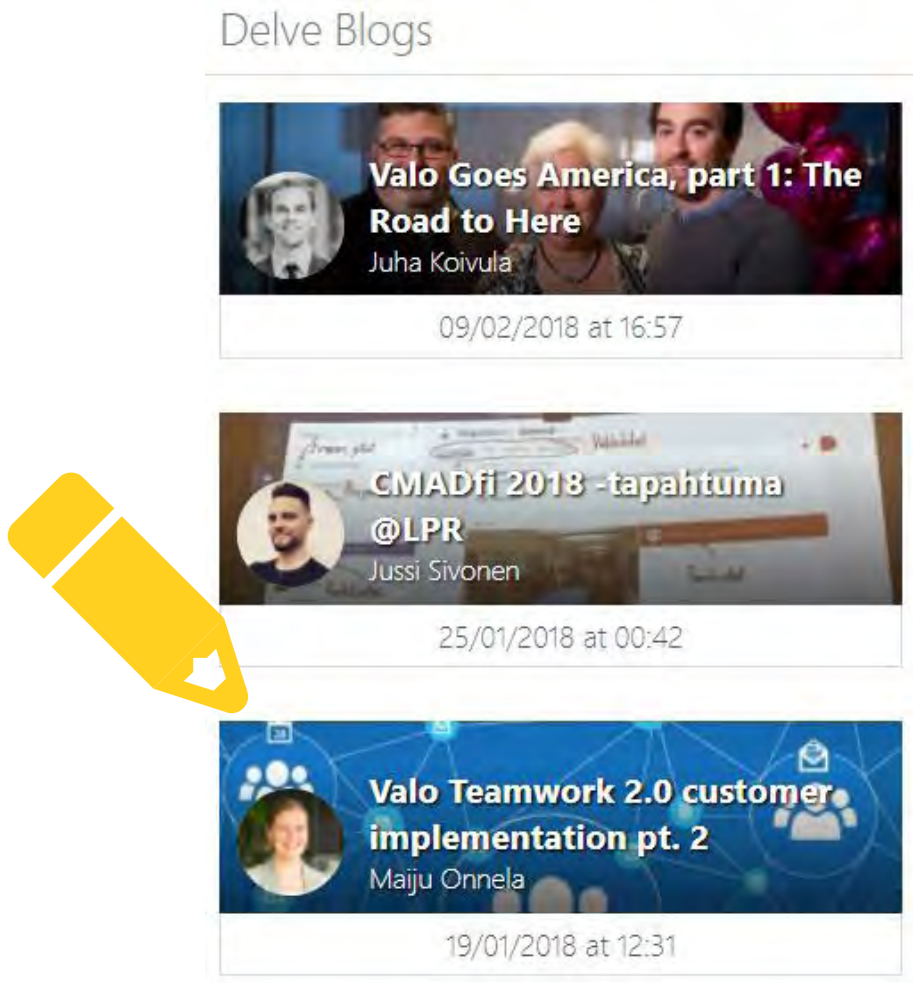




Add-on: Delve Blogs

Office 365 has a great blogging tool in Delve. However, the problem is that the blog posts are very difficult to find because they can be accessed only by navigating to person's own Delve profile.

With Delve Blogs add-on all the latest blog posts from users' Delve profiles will be surfaced in your intranet.

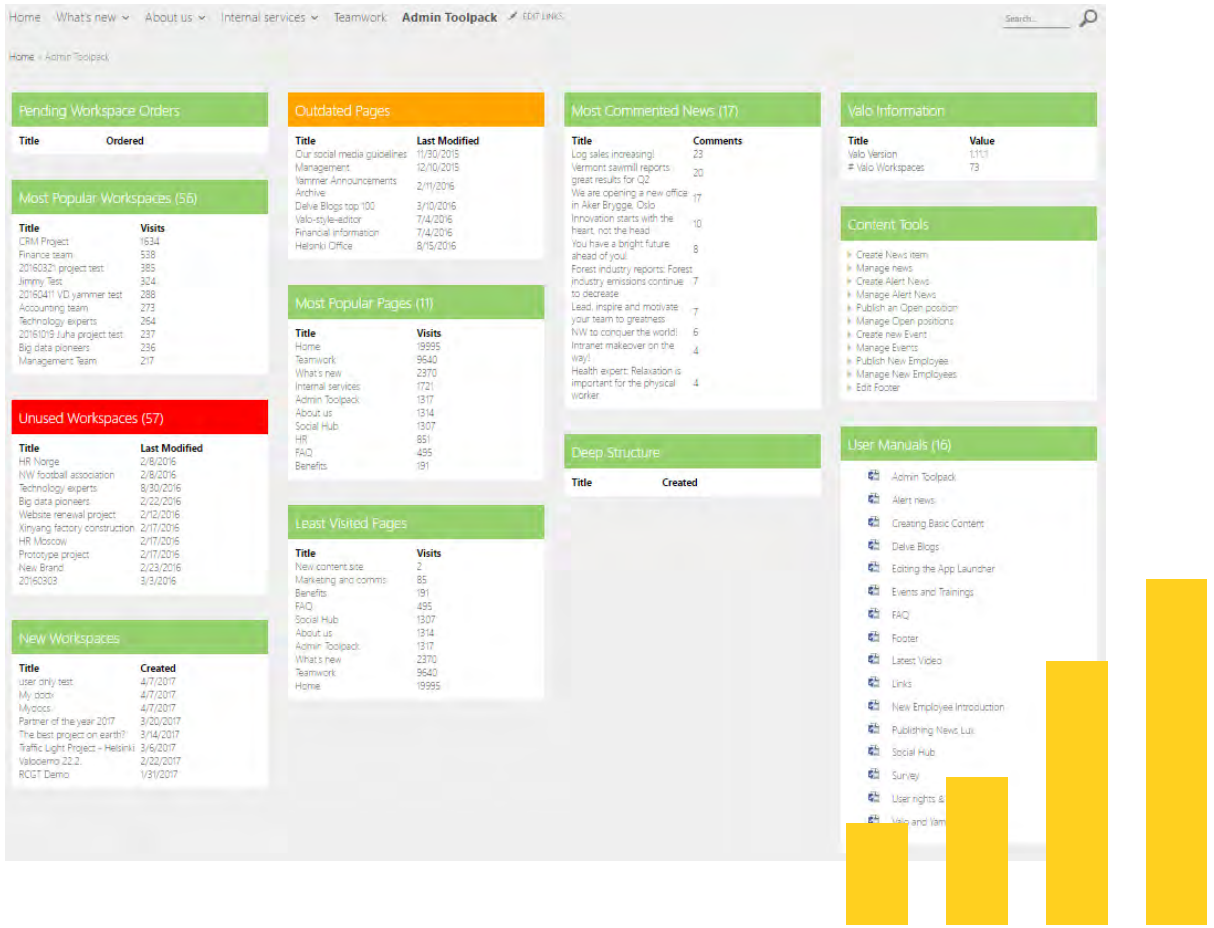


Add-on: Admin Toolpack

Gathers all the necessary Intranet statistics and tools into one view

- Content tools
- Pending workspaces
- Most popular workspaces
- New workspaces
- Outdated pages
- Most unpopular pages
- Most popular pages
- Most commented news
- Most liked news
- User manuals

Lots of configurable parameters



Thank You!

Please contact us for licensing details or to arrange a demo