What is Envision IT's
Microsoft 365 Maturity Model?

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- Passion for MS Teams use
- @RizInsights

■ There are 5 stages to the Envision IT Microsoft 365 Maturity Model:

- Optimized (highest)
- Proactive
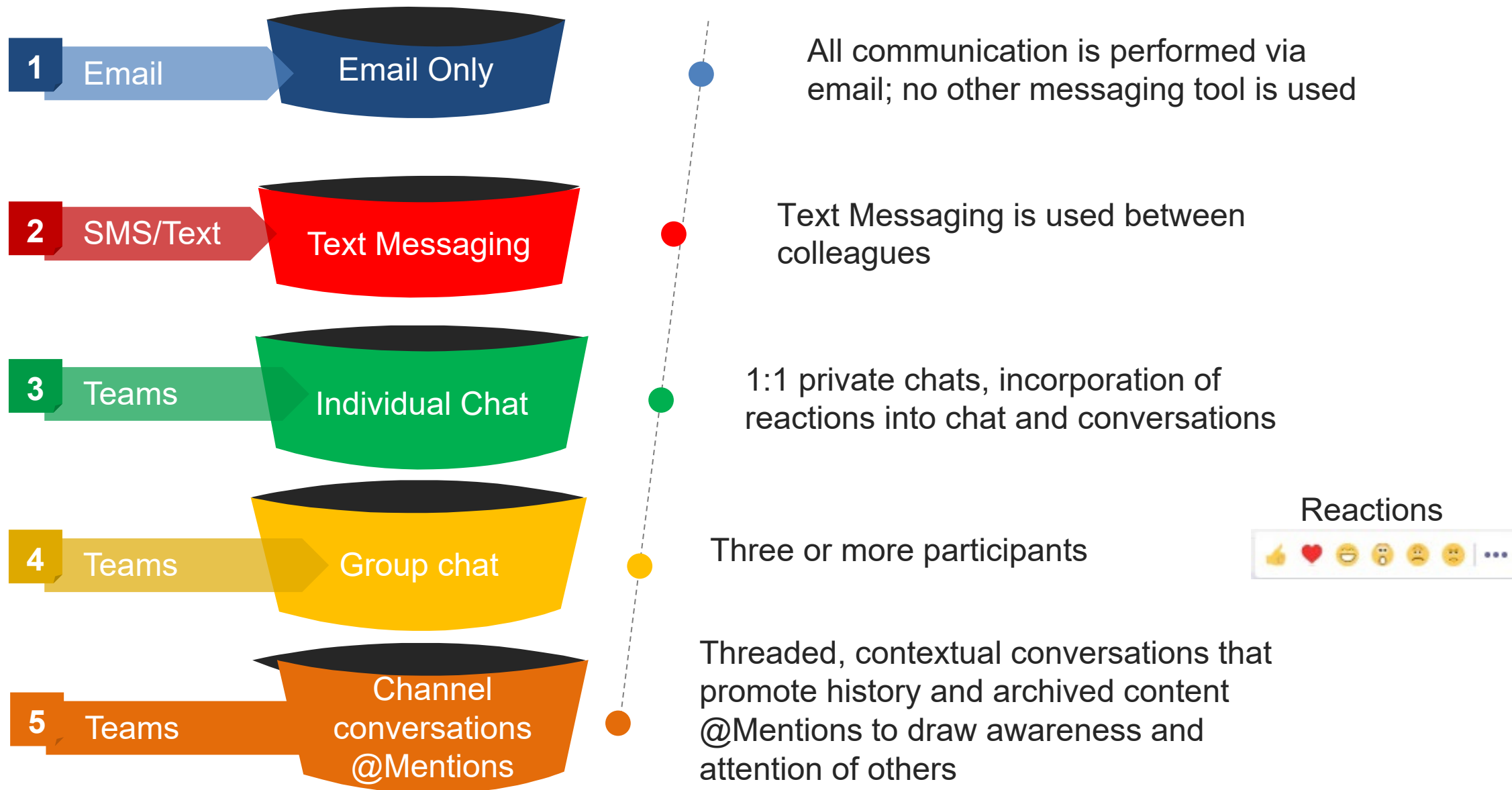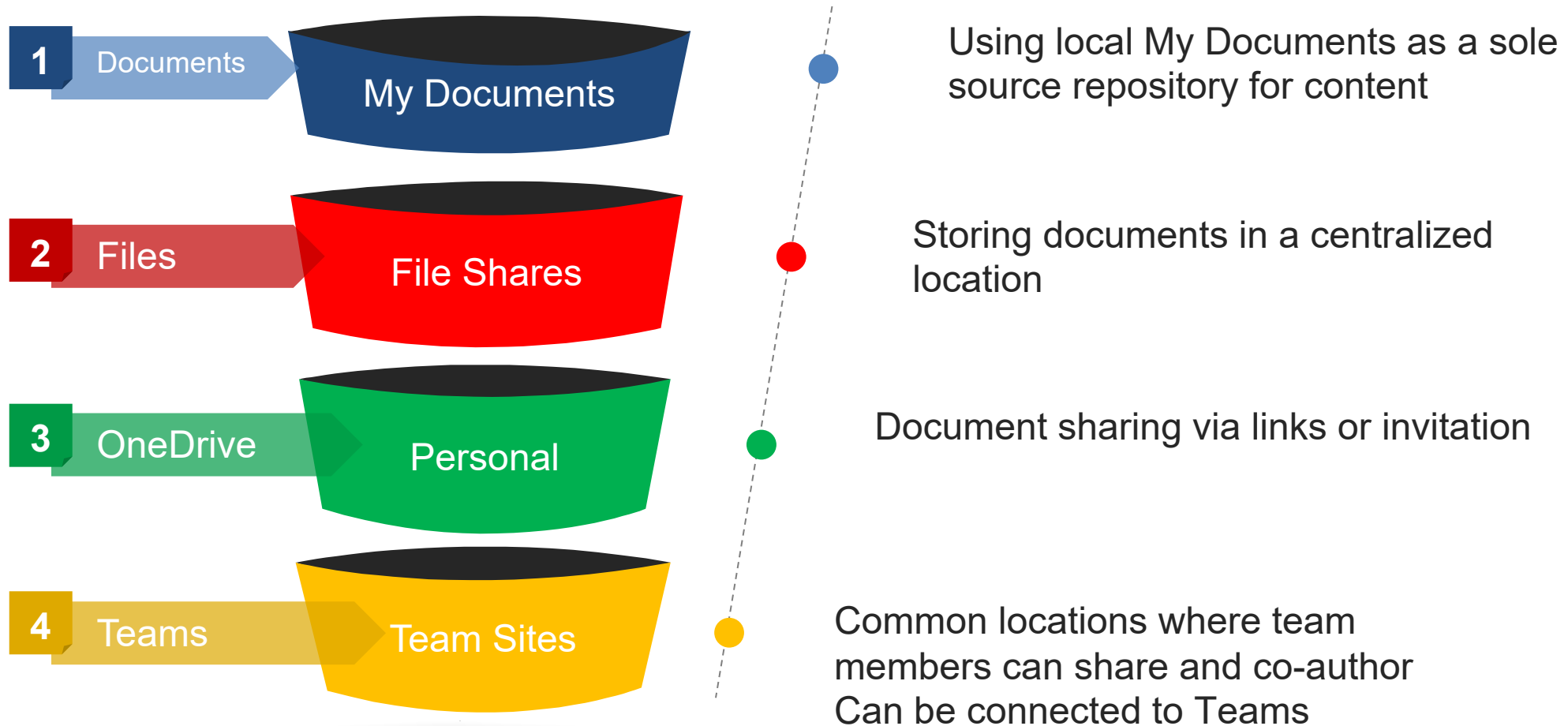- Consistent
- Ad Hoc
- Informal (lowest)

What to Use When?
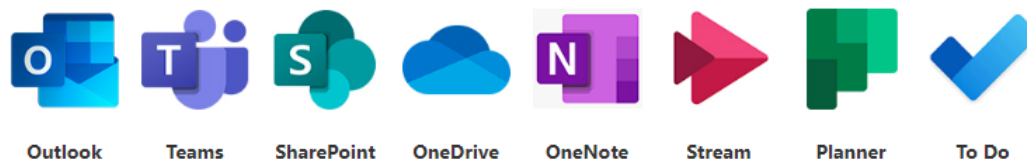
	Outlook	Teams	SharePoint	OneDrive	OneNote	Stream	Planner	To Do
Send and receive information	*	*						
Chat with others		*						
Store my files		*	*	*				
Store team files		*	*	*				
Capture best practices			*		*			
Manage my tasks	*						*	*
Manage team tasks							*	*
Manage my time	*	*						
Organize workspaces		*						
Develop documents			*	*	*			
Participate in online meetings		*						
Share screen / present information		*						
Record meetings		*				*		
Share videos						*		

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1 Email — Email Only

All communication is performed via email; no other messaging tool is used

2 SMS/Text — Text Messaging

Text Messaging is used between colleagues

3 Teams — Individual Chat

1:1 private chats, incorporation of reactions into chat and conversations

4 Teams — Group chat

Three or more participants

Reactions

5 Teams — Channel conversations @Mentions

Threaded, contextual conversations that promote history and archived content @Mentions to draw awareness and attention of others

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1 Joining — Team Meetings

Joining Teams meetings via desktop, web or app to take part in the conversation

2 Sharing — Webcams, Screens

Sharing your webcam and screen/app with meeting participants

3 Recording — Creating, Finding

Creating a Stream recording and finding other recorded content

4 OneNote — Meeting Notes

Taking centralized meeting notes in OneNote for all team members to use

Demo - Peter

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Microsoft Teams for US Government

Day in the life – Program Management (PMO) Senior Program Manager

Meet Justin, a Program Manager within the US Air Force IT PMO. Justin is a GS-13 civil service employee who is the Service Owner of both Microsoft Teams and SharePoint Online. Justin is responsible for making sure that both Teams and SharePoint are integrated smoothly into the Air Force's existing operations and uses Teams to help him achieve success.

7:00 AM

While eating breakfast, Justin does a quick check of both the **Teams and Outlook mobile apps** on his government issued iPad. He makes sure to note his upcoming schedule for the day.

8:00 AM

Arriving at the office, he checks his Teams **Activity Feed** on his desktop computer. He reviews his **@mentions** and sees he has been asked to put together a presentation about the status of the Teams deployment project for leadership.

> **Tom** 7:42 AM
> **Justin**, please create a presentation about the status of the teams deployment project for leadership.

9:30 AM

Before beginning any of his deliverables, Justin makes sure to jot down all of the tasks he and his team need to complete in the team's **OneNote tab.**
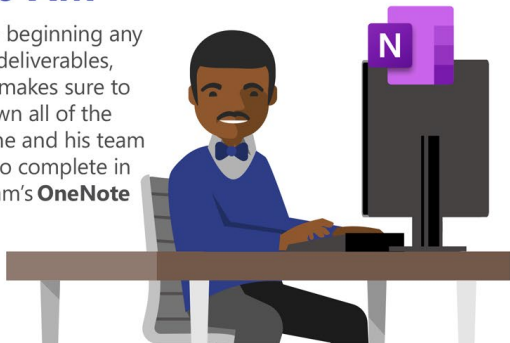
10:00 AM

Justin starts working on his PowerPoint presentation and **uploads the first draft to Teams** so he can have colleagues help gather the right content. He **@mentions** Liz and asks her to add a slide on the Champions Program.

> **Justin** 10:00 AM
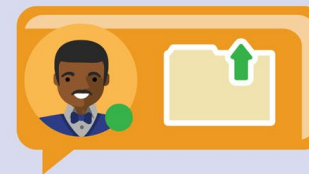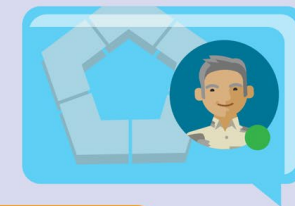> **Liz**, can you add a slide on the Champions Program?

12:00 PM

While on his way to the cafeteria, an Airman tells him about how their **collaboration** experience has drastically improved with Teams. Curious to learn more, Justin uses his mobile device to set up a meeting on Teams.
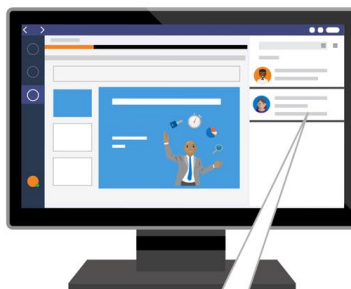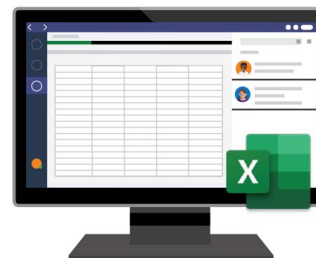
2:00 PM

Back at his desk, Justin finalizes his presentation and sends it directly to the CIO at the Pentagon via **1:1 chat** for final review.

3:30 PM

Justin makes some final updates to the upcoming Government Fiscal Year budgets for his program. Justin **edits the Excel document** that is pinned as a **tab** in the GFY20 Budgets Team.

4:30 PM

Justin receives the go-ahead from the CIO on his presentation and the OK to deploy Teams to all of USAF. He is ecstatic and shares the news to his team in an **announcements post** in Teams.

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Microsoft Teams

Day in the life - Sales

April is a sales representative at Contoso Foods responsible for growing the Midwest district's customer base and closing deals to grow revenue and retaining highly satisfied customers in the Midwest district.

7:45 AM

April starts her day planning her sales strategy on ways to exceed her quota for the quarter. She reviews Teams and notices a feed from the Dynamics CRM connector about a Fabrikam lead.

8:30 AM

She starts researching Fabrikam using the Power BI dashboard tab. She uses WhoBot to find Derek, an expert on Fabrikam.

9:30 AM

April reaches out to Derick via private chat on Teams and asks for his help with an introduction. Derick agrees and includes her in a Teams meeting with the director at Fabrikam.

11:30 AM

April and Derick join their meeting on Teams. With the director's permission, they record the meeting and documents his vision in the notes section of the meeting.

2:00 PM

April is excited about this opportunity to grow sales in the Midwest district with Fabrikam. She creates a new team in Teams and includes Derick, along with other SMEs to help put together their proposal.

3:30 PM

April has a meeting with her team and posts a link to the meeting recording and her notes. She then creates a new OneNote tab in their channel.
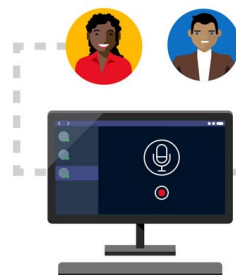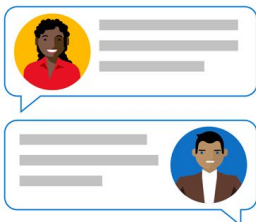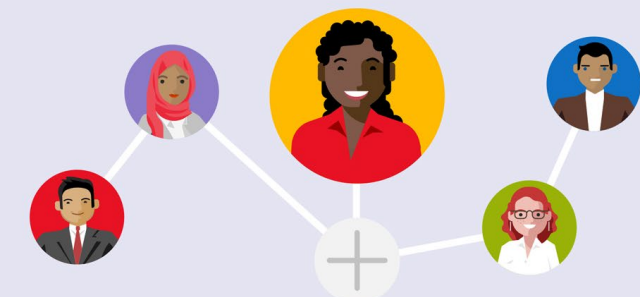
4:30 PM

April also creates a new Planner tab and assigns several tasks with owners and due dates. She @mentions her team asking them to review the tasks and share their feedback.

5:00 PM

Excited with prospect of new opportunity to close a deal, she navigates to the Dynamics tab and updates her lead to opportunity stage.

SALES

Microsoft Teams

Day in the life – IT Project Manager

Jamal is an IT project manager with Contoso Technologies and is responsible for making sure IT projects are meeting stakeholders needs, and delivered on time and within budget.
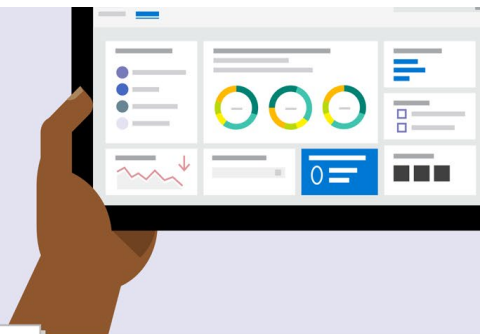
7:45 AM
Jamal uses his Teams mobile app to get up to speed the activity feed as he travels to work and joins the daily stand up call remotely.
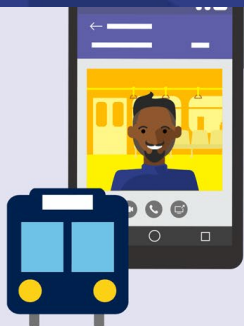
8:30 AM
At the office, he navigates to the Azure DevOps dashboard tab in Teams. Jamal reviews his projects and notes a few trends that are concerning.

2:00 PM
He prepares his meeting notes and replays the Teams cloud based meeting recording for things that he may have missed. He @mentions the channel with updates and action items in Planner.
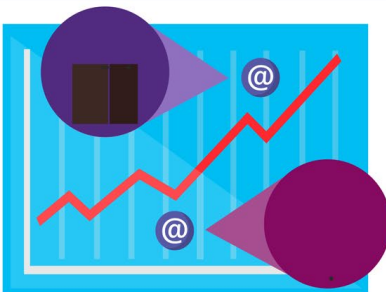
3:30 PM
Jamal gets notified in Teams of a new bug that was posted in the channel from the Azure DevOps connector. He @mentions experts to help to resolve in time for their release date.
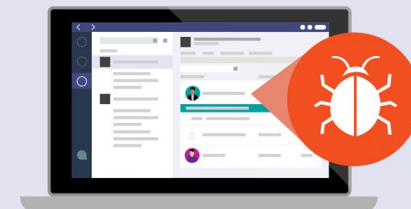
9:30 AM
On Teams he asks for additional data points related to projects risks and @ mentions specific individuals to get their attention.

11:30 AM
Jamal joins a project review meeting in Teams, shares his screen, and navigates to the Planner tab to review key activities by owner and adjusts due dates.

4:30 PM
In Teams he goes to the Financial app tab to update current resource costs for several of his projects.

6:00 PM
Jamal receives another notification from Azure DevOps notifying him that the bug is being resolved. He prepares for his weekly status report and posts it into the PMO Teams site @ mentioning the team.

Microsoft 365 Maturity

Level	Teams	Stream	SharePoint	OneDrive	OneNote	Outlook
Optimized	Business transformation and process development; usage of >95%	All meetings are recorded and processed; policies exist to record based on retention and regulatory needs	External data is leveraged; multiple systems are integrated with SharePoint; usage >85%	All files and workloads are synchronized (local files do note exist) and integrated features are leveraged; usage >85%	All information and notes are stored in a corresponding OneNote and shared across the organization	Email outside the organization; all integrated features across M365 are leveraged (ribbon)
Proactive	Integrated Teams dependency across the organization; usage >90%	All meetings are recorded and recordings are distributed to content websites	Processes, forms and surveys are commonly used, reports are aggregated; usage >70%	Links are commonly used to share content, usage continues to increase >60%	OneNote files are shared via and from Teams throughout the organization	Internal email use decreases; information is increasingly shared between M365 apps with usage <75%
Consistent	Deployment across the organization; usage of >75%	>75% of meetings are recorded and made available after the call	SharePoint is the standard for information management and workloads; usage <50%	Users store their data in and via OneDrive; data is synchronized; usage >50%	Notebooks are shared; cross app functionality is used, standardization begins to occur	Client-side email rules and tags exist for individuals and businesses, folders are used and prioritized
Ad-Hoc	Cross-departmental usage; >40% of users are online with Teams	<50% of meetings are recorded	Information is shared within departments, links to content is common; usage >20%	Users store content infrequently unless prompted by M365 Apps	Structured note-taking across a business unit; categories and tabs are used in a formal way	Email is predictive as Teams use increases; ribbon functionality is >25% usage
Informal	General functional use in a single department (minimum)	Meetings are rarely recorded; Stream is not used	SharePoint is used for document storage and general information is posted to portals	Files are stored and synchronized in OneDrive without user knowledge	General usage for note-taking in user communities; quick notes are used	Basic use; email sent and received

Teams Maturity

Level	Teams	User	User II	Power User	Super User	Admin
Optimized	*Business transformation and process development; usage of >95%*	Collaboration with vendors, suppliers, and clients is enabled through Guest access	Planner is leveraged daily with users updating tasks and status regularly	Internal employee review cycles are fully automated and enabled by Teams	Hard to reach employees are empowered by the tool	Corporate events are performed via live event functionality, recorded, streamed and made available following the session
Proactive	*Integrated Teams dependency across the organization; usage >90%*	All communication is standardized - chat, channel conversations, messaging all in Teams	Prepare and use OneNote templates for meetings	Disengaged staff are enabled and online	Private channels are used on a regular basis	Governance and compliance policies are created and maintained internally
Consistent	*Deployment across the organization; usage of >75%*	All meetings are created via Microsoft Teams	Personalization of the Teams environment; Pinned chats Teams sorted and categorized	Information is pushed/received from Tabs and Apps	Microsoft Planner is consistently deployed and used to drive projects	Outlook meetings are pushed to OneNote for note-taking and minutes
Ad-Hoc	*Cross-departmental usage; >40% of users are online with Teams*	Used @ mention to draw attention from other users in multiple apps	Search for data/content in conversation threads (incl Exchange, SharePoint Online, OneDrive for Business)	Use expanded format mode for conversations, mark messages important, add subject	Slash commands are used internally	First third-party application is deployed on Teams
Informal	*General functional use in a single department (minimum)*	Participated in Teams Calls	Shared Screen with others	Chatted with another user	Participated in group chat	Used @ mention to draw attention to/from other users

Stream Maturity

Level	Stream	User	User II	Power User	Super User	Admin
Optimized	*All meetings are recorded and processed; policies exist to record based on retention and regulatory needs*	Resource roles are standardized for content ownership and video handling once processed	Scripts are created to automatically download recordings and publish to Teams or OneDrive for Business	Outreach, awareness and training campaigns are tracked and measured	API to extract Stream transcript into corresponding OneNote	Live events are used/recorded for corporate events, presentations and content sharing
Proactive	*All meetings are recorded and recordings are distributed to content websites*	Forms are embedded in Stream videos for content incorporation and feedback	Microsoft Stream app is standardized and deployed to staff on mobile devices	Stream usage, outcomes and successes are measured and evaluated	Scripts are created to automatically download recordings and publish to personal OneDrive's	Video transcription text is exported from Stream and used in meeting minutes or other documents
Consistent	*>75% of meetings are recorded and made available after the call*	Trending videos are tracked and pushed to users	Stream recordings are leveraged with new staff for training	Staff regularly use Stream when meetings are misses to review content	Stream Videos are embedded in SharePoint via Stream WebPart	Stream content is used across Microsoft 365 Apps (Yammer, SharePoint, OneNote, PowerPoint, Sway)
Ad-Hoc	*<50% of meetings are recorded*	Users begin to "like" videos and share with teammates	Office 365 Group Workspaces are used to load appropriate content	Channels are used to organize content and followed by staff	All team members are trained on how to use Stream	Editing features are leveraged; editing video information, trimming a video
Informal	*Meetings are rarely recorded; Stream is not used*	Staff know where to locate Stream recordings	Team members know how to upload a video to Stream	Videos tab is added in Teams	Staff use search functionality within Stream	Recycle bin is used to recover an accidently deleted video (30 day limit)

SharePoint Maturity

Level	SharePoint	User	User II	Power User	Super User	Admin
Optimized	*External data is leveraged; multiple systems are integrated with SharePoint; usage >85%*	Power BI report server generates business metrics and KPI's on scheduled intervals	Vendor and customer management is performed in SharePoint	Surveys are used to gauge employee feedback and performance	All internal self-service functions leverage SharePoint (leave requests, vacation, etc)	Integration with Power Apps, Power BI and Power Automate - used to create business critical workflow
Proactive	*Processes, forms and surveys are commonly used, reports are aggregated; usage >70%*	SharePoint is used as a workplace on a daily basis	Adoption support is made available to new staff (personal and Stream content)	Administrators leverage SharePoint's built-in site usage reporting to measure impact & usage	Internal processes and workflows are created/leveraged to modernize processes	Developers are using SPFx to create webparts
Consistent	*SharePoint is the standard for information management and workloads; usage <50%*	Team sites are used for collaboration, news events are posted for cross-company consumption	Search is used across sites and workspaces	Communication Sites are used for internal content publishing and shared with team members	Stream Videos are embedded in SharePoint via Stream WebPart	Line of Busines systems are integrated and enabled (Financial, HR)
Ad-Hoc	*Information is shared within departments, links to content is common; usage >20%*	Documents are edited in-browser	Co-authoring is used when working on files	Lists and libraries are added to Team Sites; content is synchronized	Version history is enabled and users can recall previous versions	Records management tools enabled; metadata, e-discovery, retention are used
Informal	*SharePoint is used for document storage and general information is posted to portals*	Staff can locate project and file data as needed (document libraries)	Files are shared between team members (sole source content)	SharePoint Documents are accessed and downloaded	Sites are shared internally and externally (as required)	Microsoft 365 applications are commonly leveraged for information sharing

OneDrive Maturity

Level	OneDrive	User	User II	Power User	Super User	Admin
Optimized	*All files and workloads are synchronized (local files do note exist) and integrated features are leveraged; usage >85%*	Business cards and expense receipts are scanned with OneDrive mobile	Recycle bin is used to recover files	OneDrive Files Restore is used to restore files over the past 30 days	Customer lockbox is used when for Microsoft support	Companies use auditing on individual file actions and usage to promote training and adoption
Proactive	*Links are commonly used to share content, usage continues to increase >60%*	Content is driven from the same OneDrive input file enabling downstream reports refresh	Microsoft OneDrive app is standardized and deployed to staff on mobile devices	Intelligent discovery of documents	Data Loss Prevention enabled and leveraged as required	Retention, auditing and alerts are configured based on user needs
Consistent	*Users store their data in and via OneDrive; data is synchronized; usage >50%*	OneDrive and OneDrive for Business are used correctly and effectively	A champions program is created to guide OneDrive maturity across the organization	Best practices are developed; experts and teams company-wide share best practices for user success	Link policies are created (shareable, internal, direct)	Multi-factor authentication, rights management, remote wipe, and data loss prevention controls are used
Ad-Hoc	*Users store content infrequently unless prompted by M365 Apps*	Links are created per shared user and time boxed, expiring per a specified schedule	File links are used and sent to connect files to conversations (Teams)	Select files are intentionally downloaded for working offline	Files are distributed and comments/edits are captured to track changes	Links are shared outside the organization to access content
Informal	*Files are stored and synchronized in OneDrive without user knowledge*	Users are aware that their files are backed up in OneDrive	Files are accessed from anywhere (laptop, desktop, mobile)	Links are shared between team members to distribute content	Coauthoring is used as needed (Word, Excel, PowerPoint)	Content is updated whenever and wherever knowing content will be updated once online

OneNote Maturity

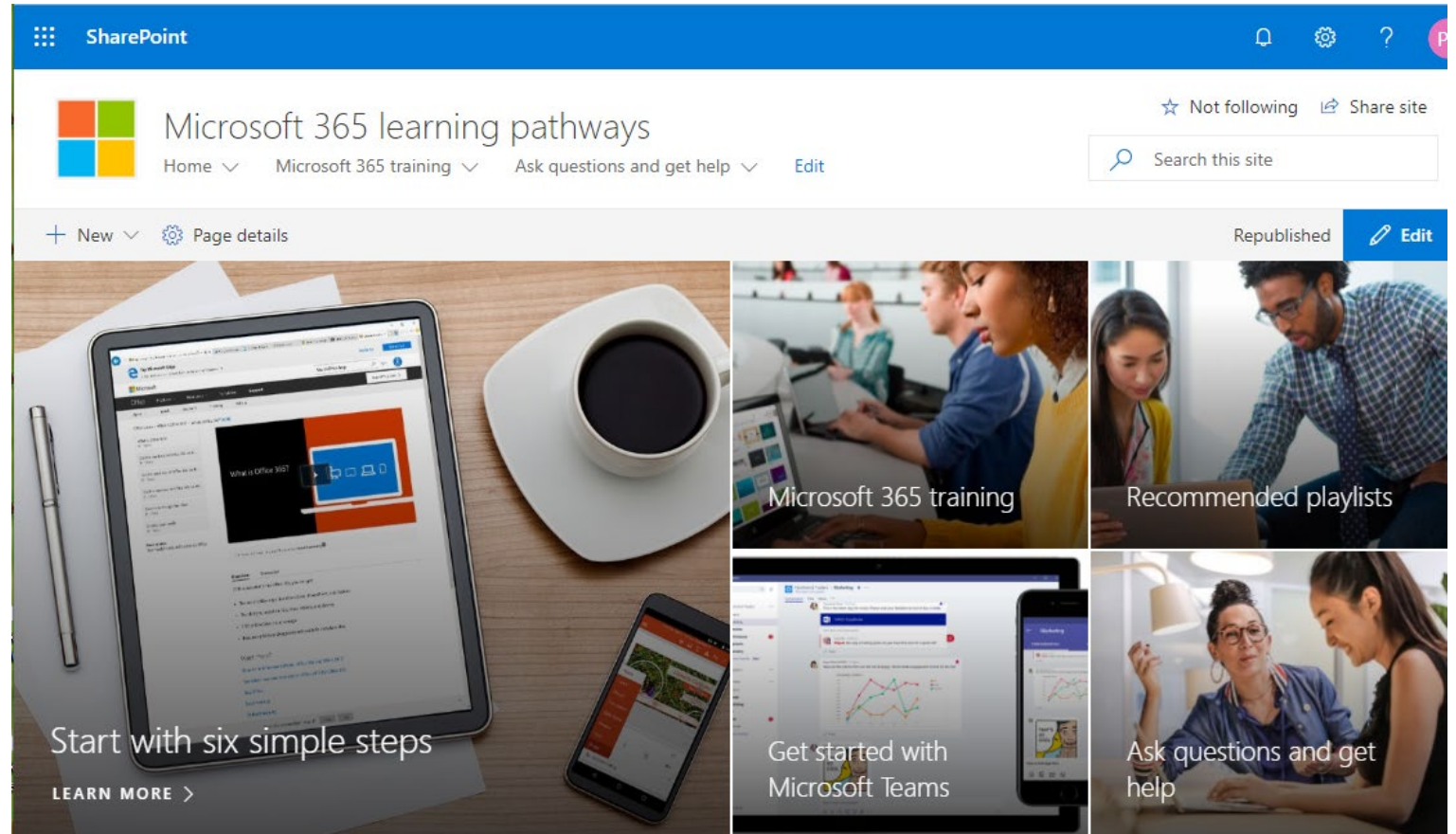| Level	OneNote	User	User II	Power User	Super User	Admin
Optimized	*All information and notes are stored in a corresponding OneNote and shared across the organization*	Uses CTRL shortcut keys to assign tags to existing notes	Uses Page Versions feature to restore content mistakenly overwritten	Tasks and To-Do integration is used to manage tasks across apps (Outlook)	Uses math calculations features inline and from handwritten formulas	All corporate content is categorized and managed in OneNote, made available across the organization
Proactive	*OneNote files are shared via and from Teams throughout the organization*	Links are used within a notebook to relevant content	Microsoft OneNote app is standardized and deployed to staff on mobile devices	OneNote content is leveraged in Microsoft Teams contextually and within the appropriate channel	Retention policies are created and managed for	OneNote training material is made available via Microsoft Stream
Consistent	*Notebooks are shared; cross app functionality is used, standardization begins to occur*	OneNote templates are created and used in recurring projects to organize notes in a specific way	Custom tags are created by users for use across projects and notebooks	History tab and page versions are used as required	Containers are used on pages to control content placement	Users leverage text translation is as required
Ad-Hoc	*Structured note-taking across a business unit; categories and tabs are used in a formal way*	Pages are promoted, demoted and collapsed in navigation	Multiple windows are enabled to view content (multiple monitors)	Email to OneNote service is used for message categorization	Sticky-notes are used to take quick notes and speed up work results	Organizational tags are created for use across OneNote instances
Informal	*General usage for note-taking in user communities; quick notes are used*	Navigation is used between pages, sections and notebooks	Notebooks are protected with passwords	Information is recorded in tabs and pages	OneNote's typical notebook, section, and pages approach is understood	Users create and share links, highlight text or paragraph, link to pages or copy link to paragraph

Outlook Maturity

Level	Outlook	User	User II	Power User	Super User	Admin
Optimized	*Email outside the organization; all integrated features across M365 are leveraged (ribbon)*	Meeting Insights are used to gather analytics prior to meetings (as required)	"Schedule a reply" is used to block time for working on a relevant message	Changes/edits the number of lines available in message preview to enhance viewing	Uses Outlook search folders to customize search experience, matching specific items	Creates quick-steps and processes to support and enhance usage
Proactive	*Internal email use decreases; information is increasingly shared between M365 apps with usage <75%*	Create a task from Microsoft To-Do directly from an email message	Microsoft Outlook app is standardized and deployed to staff on mobile devices	Cortana's Play My Emails feature is used to receive a readout of new messages	Send my Availability is used in Outlook mobile	Policies are created to secure confidential and personal information
Consistent	*Client-side email rules and tags exist for individuals and businesses, folders are used and prioritized*	Relevant email is forwarded to a Microsoft Teams channel as needed	Spam folders are scanned on a scheduled basis to ensure relevant email is not misdirected	Multiple time-zones are used to ensure meetings are created based on local participants needs	Send-later functionality is used to ensure email is sent during business hours (or relevant times)	Advanced phishing and malware services are enabled to protect inboxes
Ad-Hoc	*Email is predictive as Teams use increases; ribbon functionality is >25% usage*	Meetings and appointments are scheduled with Outlook (and Teams)	Meeting acceptances and declines are sent in response to requests	Folders are created in inboxes to categorize email	Search is leveraged using operators, punctuation and keywords to narrow results	Standards are implemented and maintained for formatting and content
Informal	*Basic use; email sent and received*	Inbox is monitored for incoming email	Replies and forwards are sent for relevant messages	Training is available for users who are uncertain on Outlook's full capabilities	Time is set aside for users to review/clean inboxes and reply to email as appropriate	Formal signatures are created and used across the organization

Learning Pathways

- Collection of online training videos and quick help
- Not just for Teams, much of Microsoft 365
- Customizable
- Future friendly

Learning Pathways

Critical Rules of Engagement
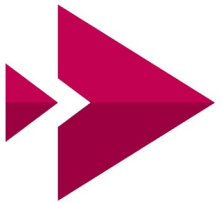
👉 Activity Feed becomes your new Inbox

💬 Set parameters around chat, conversations and reactions

! @mention to draw awareness

👥 Acknowledgements are the Microsoft Teams read-receipt

🚀 Teams is the launchpad for all O365 applications

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Microsoft Teams Tips and Tricks
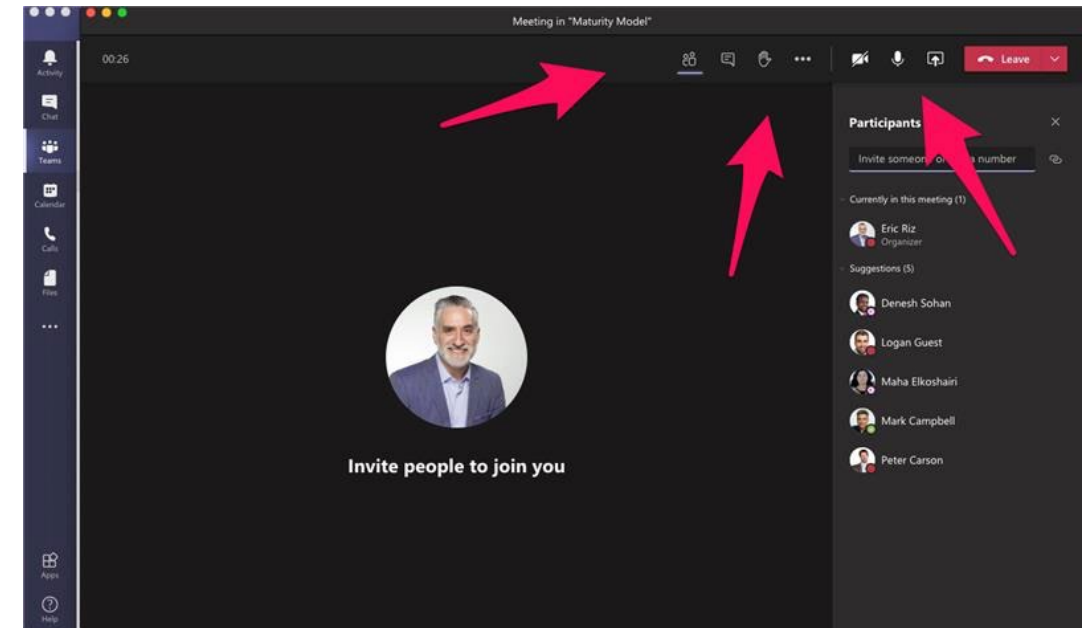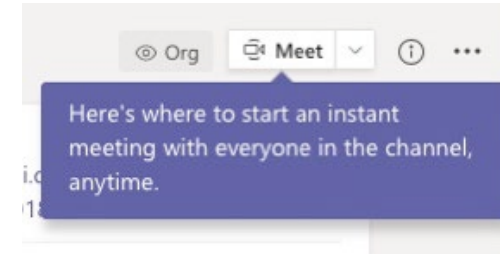
Maturity Model Survey

- Launching this Friday
- Details in follow up email
- Self assessment
- Anonymized results to be shared in next webinar

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Coming Up

- To learn more about Envision IT's Microsoft 365 Maturity Model, please book a meeting at:

https://calendly.com/envisioneric

Capturing and Evaluating Analytics on your Microsoft 365 Maturity Model Progress

August 5

Metrics don't matter if they're not measurable. In this session we'll go over survey tools, free Power BI Analytics tools from Envision IT and Microsoft, and tyGraph, a comprehensive Microsoft 365 analytics suite. We'll explain how to interpret these metrics, and use them to build your change management and adoption plan.

Plan for a successful Migration into Microsoft 365

August 12

Moving from email centric communications and file share or ad-hoc document management to a Microsoft Teams and 365 focused modern workplace takes careful planning. Inventorying current document repositories, planning out an Information Architecture that is Teams-centric but supports document collaboration well too, and ensuring the proper balance of governance and controls.

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