STONERIDGE CONNECT

2018 Client Conference

Welcome

About the Speaker

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Project Management, CRM, Architect, Culture

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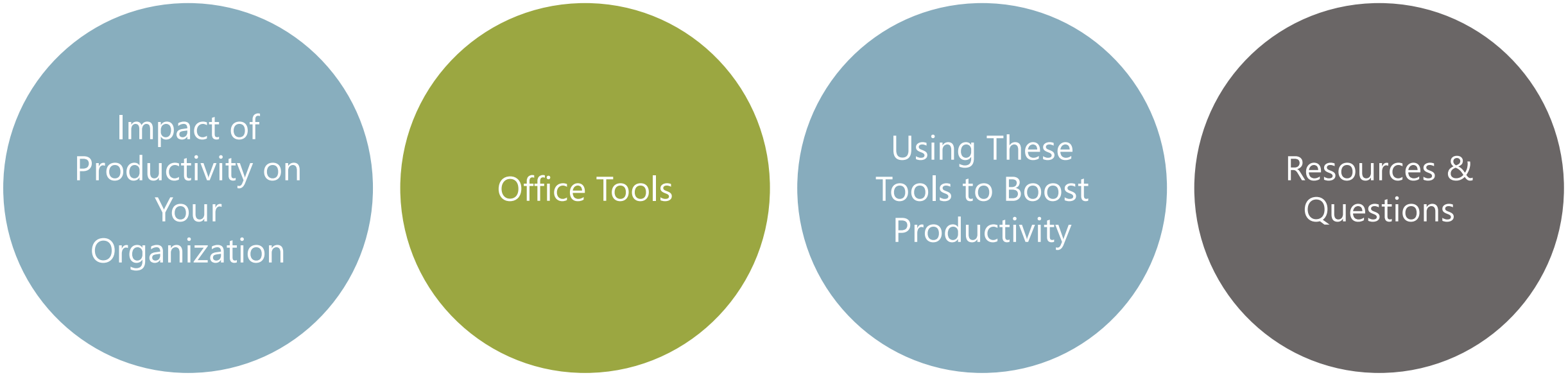
Session Agenda



Rise of the Knowledge Worker

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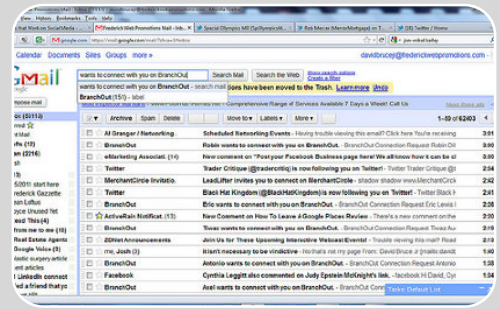
Are You Maximizing Productivity

- Do you have too many meetings?
- Are too many people invited?
- Do you have too many layers of decision makers to get to a decision?
- Do you send too much email?
- Does your team multi-task during meetings?
- Are your managers making time for the important things, like one on one meetings?

Productivity Wasters



Searches

Facebook

Meetings

Email

Impacts on Productivity

Morale

Training

Collaboration

Tools

Microsoft Office Productivity Tools

Core Microsoft Office Products

Word

- Document Editor

Excel

- Spreadsheets – world's #1 ERP

PowerPoint

- Presentations

Outlook

- Email & calendar

OneNote

- Note taking & sharing

Office 365 Groups

Power BI

Purpose: Data visualization

How to access:
https://powerbi.microsoft.com

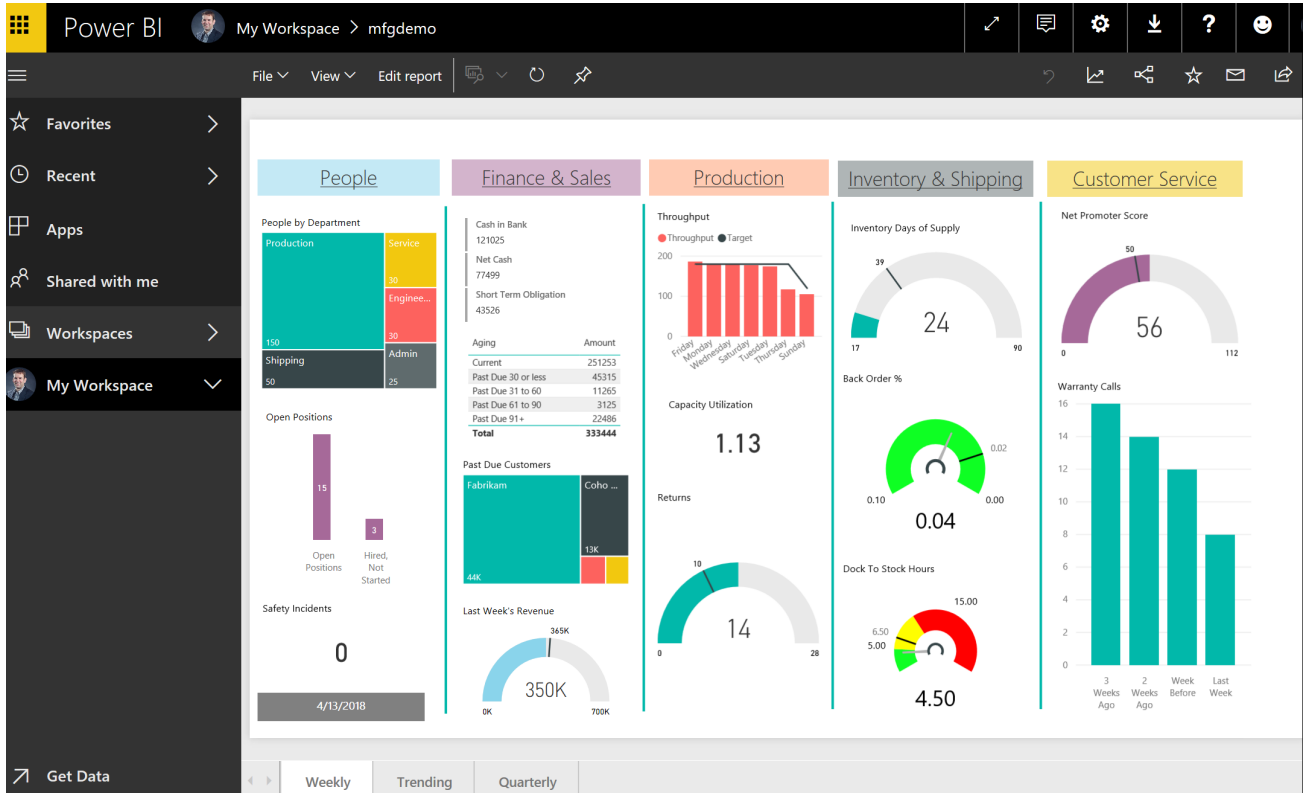
Features: Develop and share dashboards and reports

Use Cases:

1) Company scorecards
2) Key internal reports
3) Aggregate data from multiple sources

External Use: Yes

Mobile App: Yes



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OneDrive for Business

OneDrive

Purpose: File storage accessible anywhere

How to access: https://onedrive.live.com

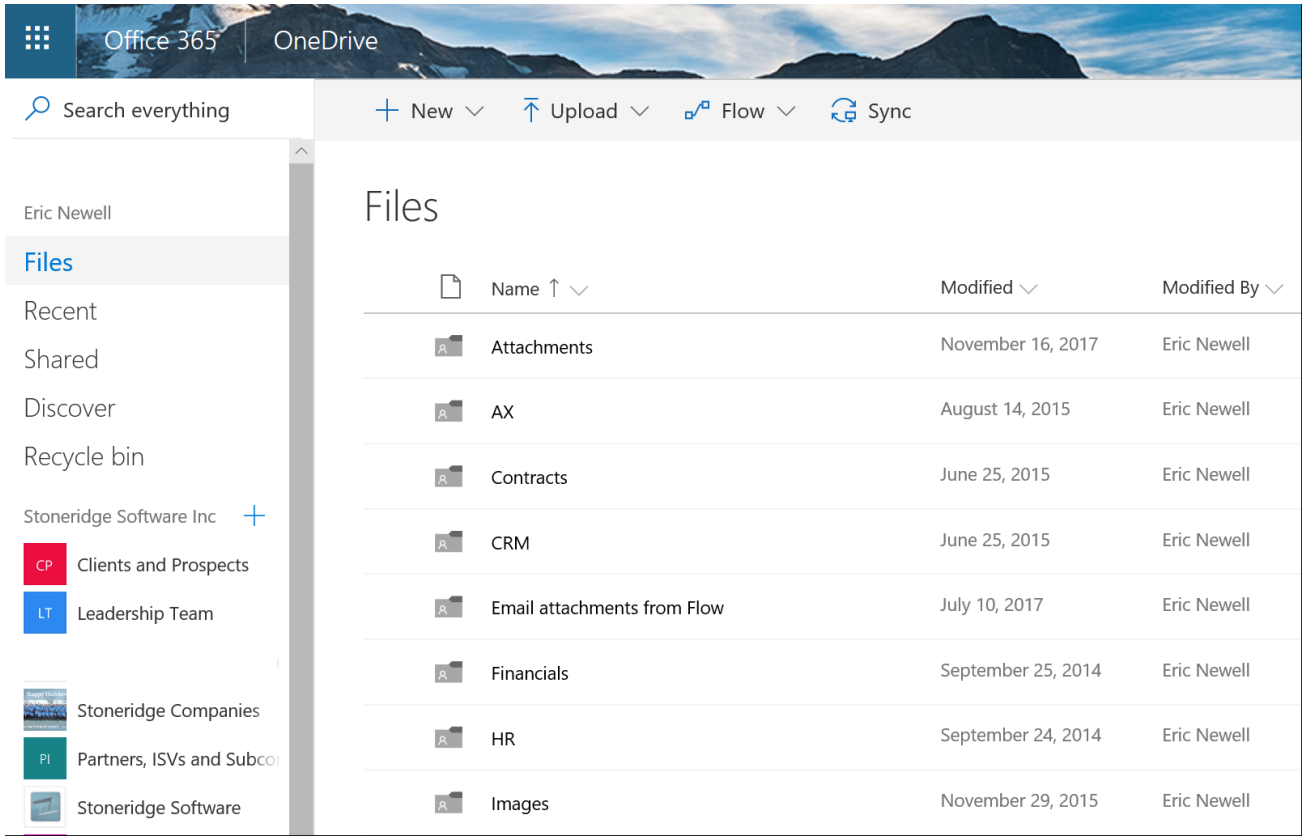
Features: Store and sync files from your hard drive

Use Cases:

1) Access files anywhere on any device
2) Back up your hard drive files
3) Store sensitive info and set permissions per file/folder

External Use: Yes

Mobile App: Yes



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Planner

Purpose: Group task management

How to access: https://tasks.office.com

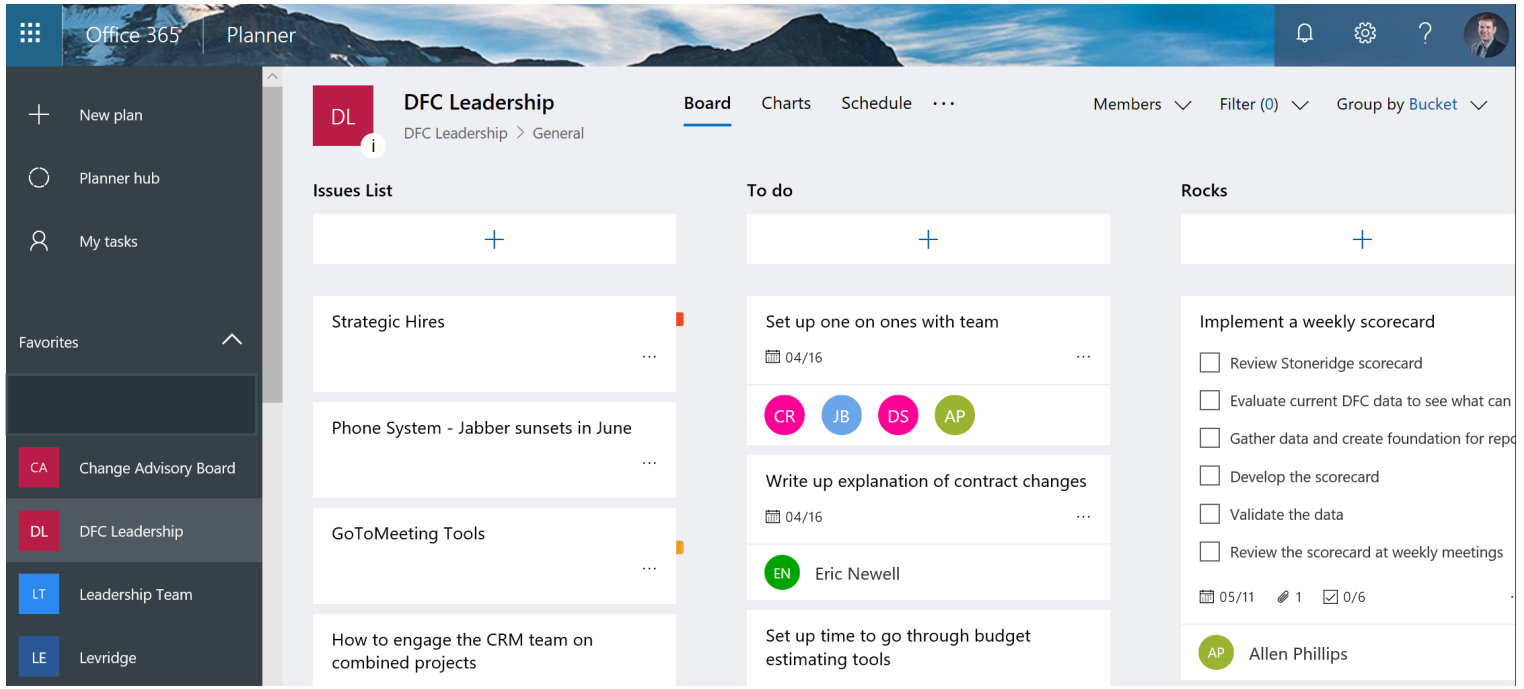
Features: Cards which can be categorized and assigned to users

Use Cases:

1) Level 10 Meetings
2) One on One Meetings
3) Sales Action Items

External Use: Yes

Mobile App: Yes



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Microsoft Teams

Teams

Purpose: Company communication

How to access:
https://teams.microsoft.com

Features: All forms of communication – conversations, instant messaging, phones

Use Cases:

1) Instant messaging, meetings & phone calls (replacing Skype for Business)
2) Group conversations
3) File storage and organization

External Use: Yes

Mobile App: Yes

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Microsoft Stream

Stream

Purpose: Video repository

How to access:
https://web.microsoftstream.com

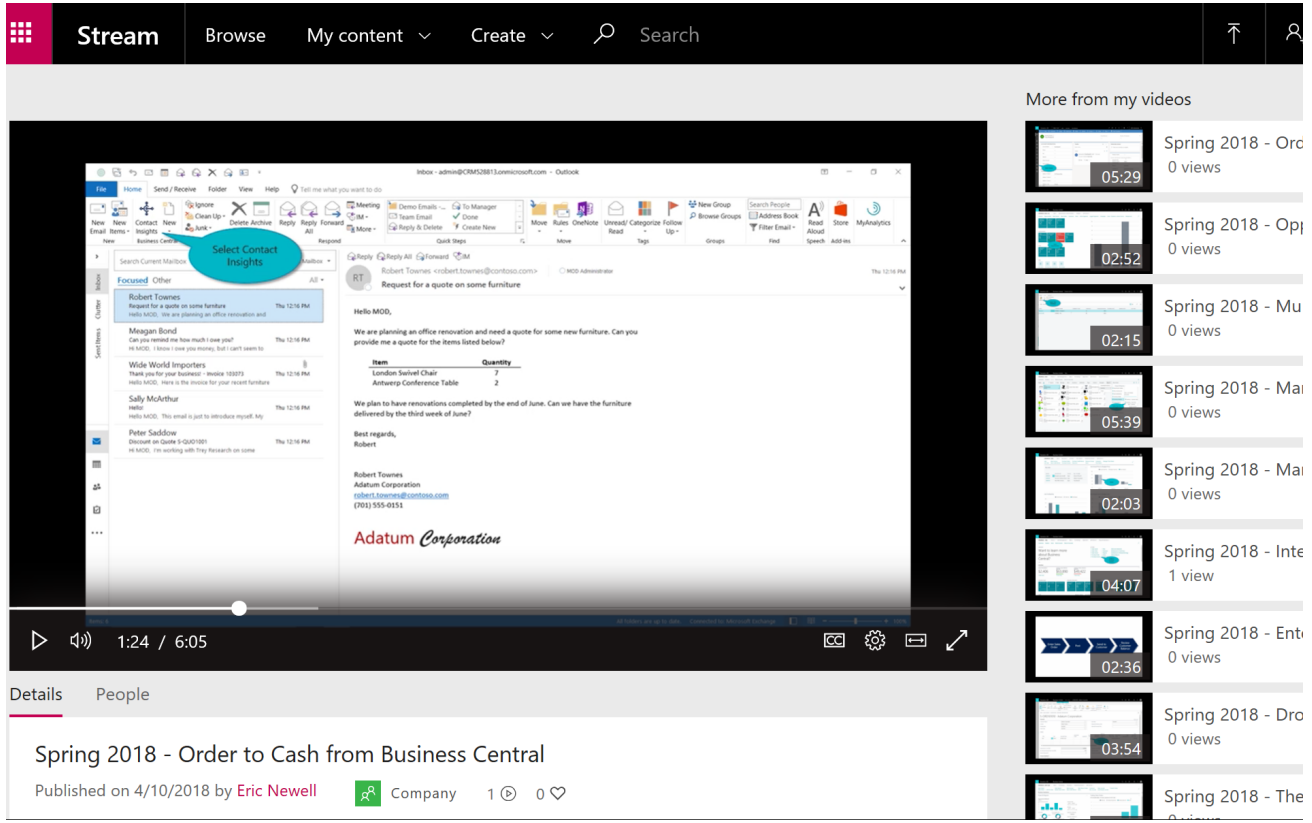
Features: Upload and organize internally developed videos

Use Cases:

1) Record and store internal meetings
2) Develop internal training content
3) Share and embed videos

External Use: Yes

Mobile App: No



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Flow

Purpose: Workflow engine

How to access:
https://flow.microsoft.com

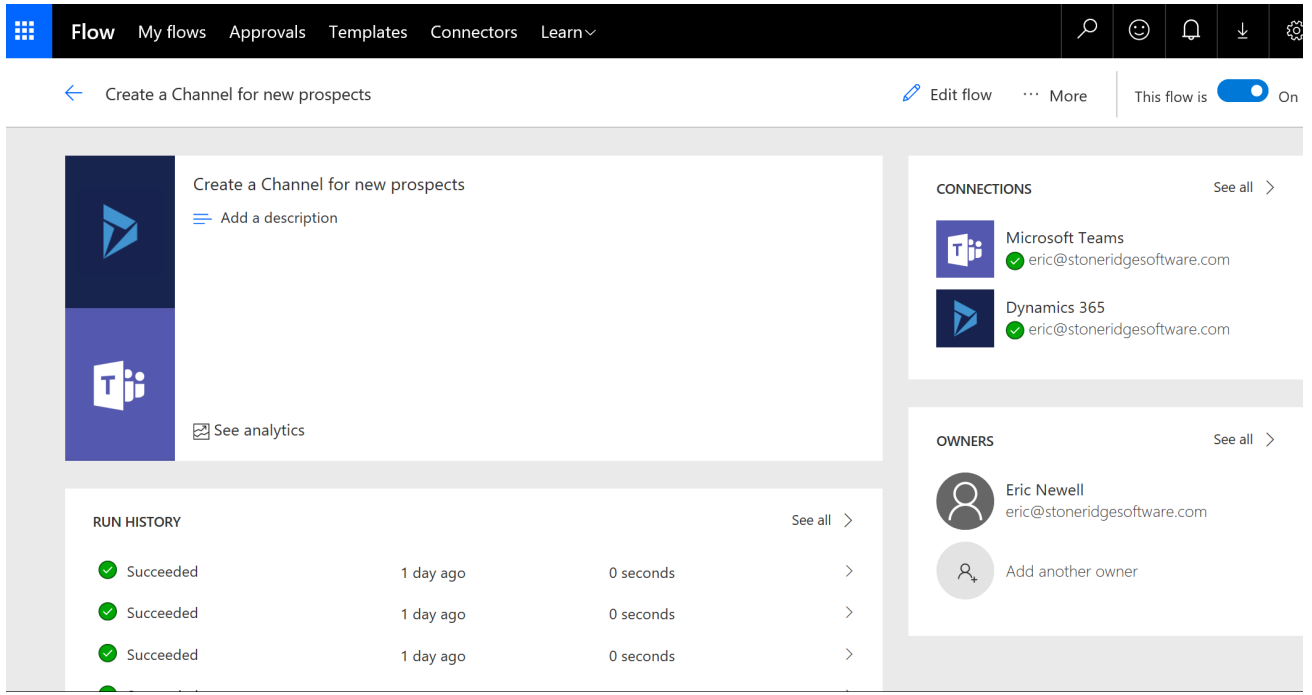
Features: Editor to create rules based on events in Office and other products

Use Cases:

1) Email notifications based on events
2) Trigger record creation across systems
3) Create buttons to gather data wherever you are

External Use: Yes

Mobile App: Yes



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PowerApps

Purpose: Mobile app access to simple to moderate business applications

How to access:
https://powerapps.microsoft.com

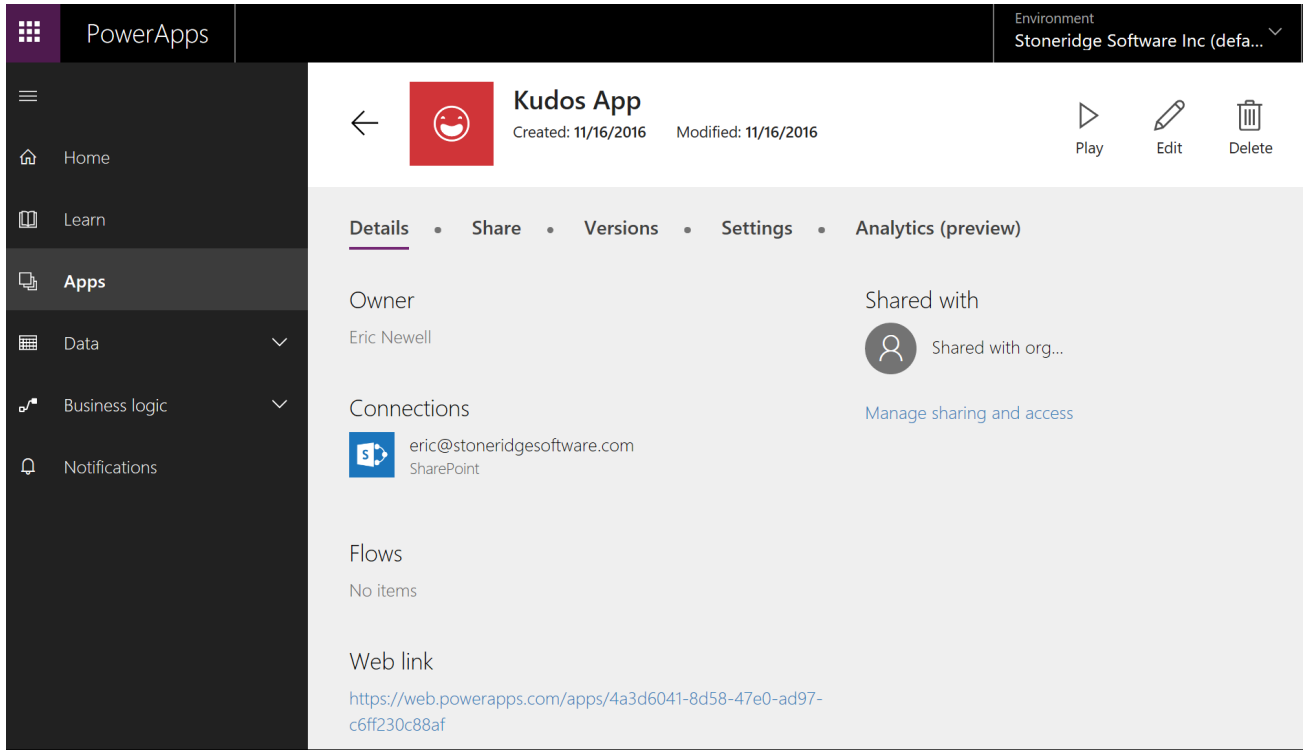
Features: Development mobile apps without programming

Use Cases:

1) Frequently used functions that need mobility
2) Basic apps that can be used on multiple platforms
3) Extend CRM or ERP functionality

External Use: Yes

Mobile App: Yes



Microsoft To-Do

To-Do

Purpose: Personal task management

How to access: https://to-do.microsoft.com

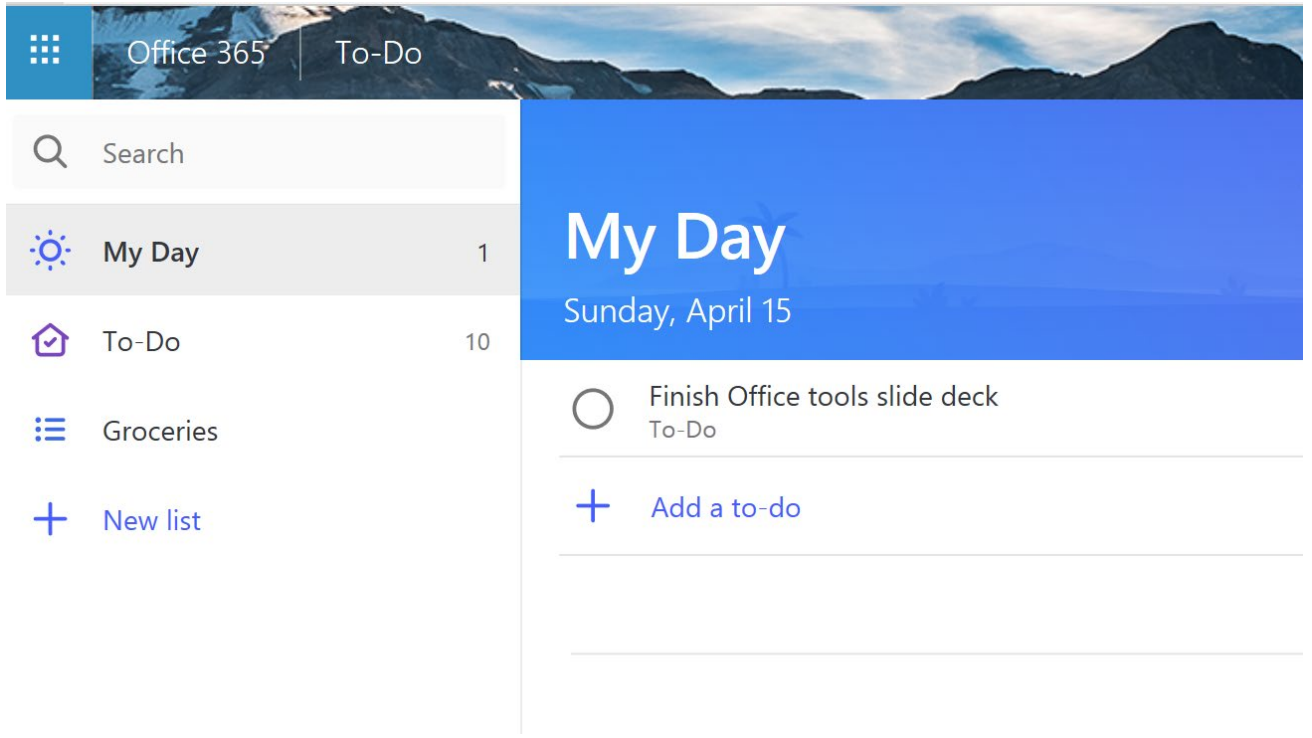
Features: Create and update to do lists

Use Cases:

1) Manage daily activities
2) Sync tasks from Outlook automatically
3) Create lists for anything you want to manage

External Use: No

Mobile App: Yes



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Forms

Purpose: Surveys or internal information gathering

How to access: https://forms.office.com

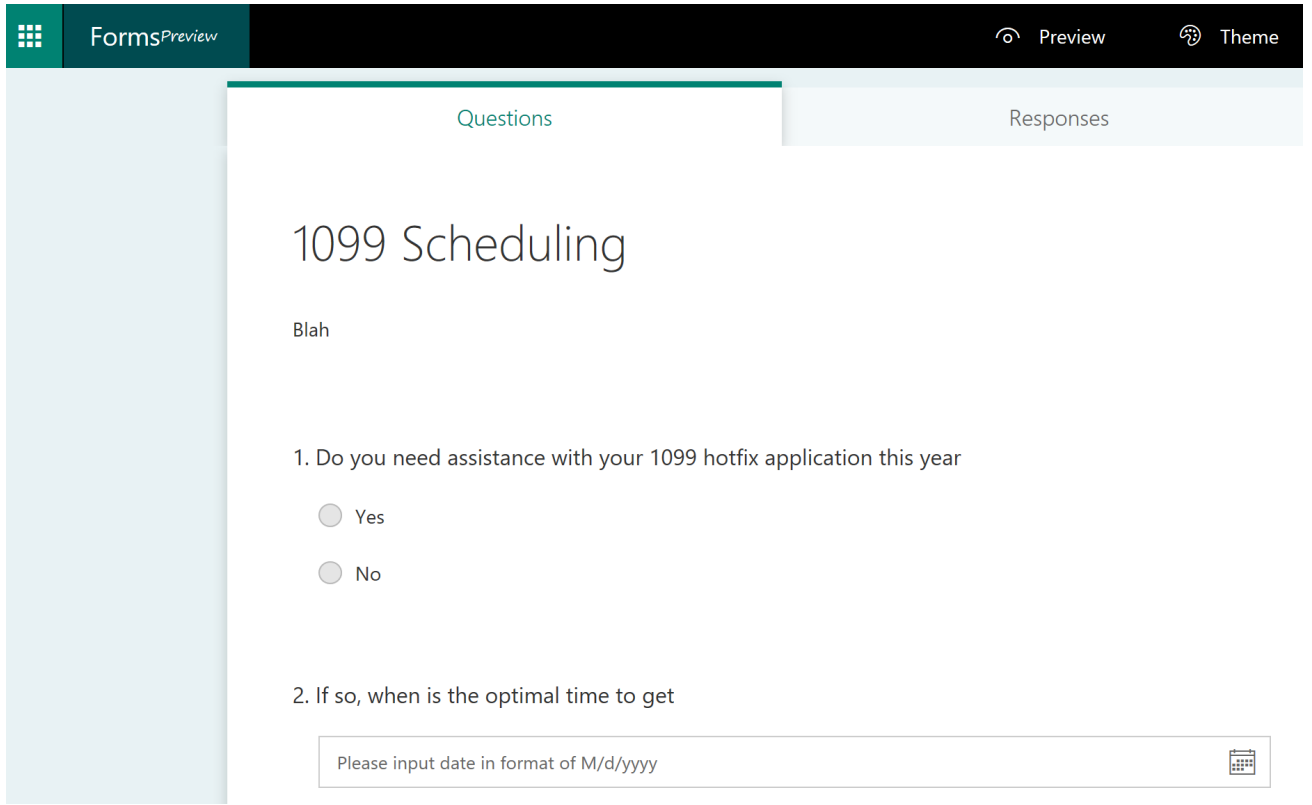
Features: Quickly develop and deploy surveys

Use Cases:

1) 360 Degree Feedback on team members
2) Food orders
3) Requesting Virtual Machines

External Use: Yes

Mobile App: No



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Sway

Purpose: Quickly develop presentations

How to access: https://sway.com

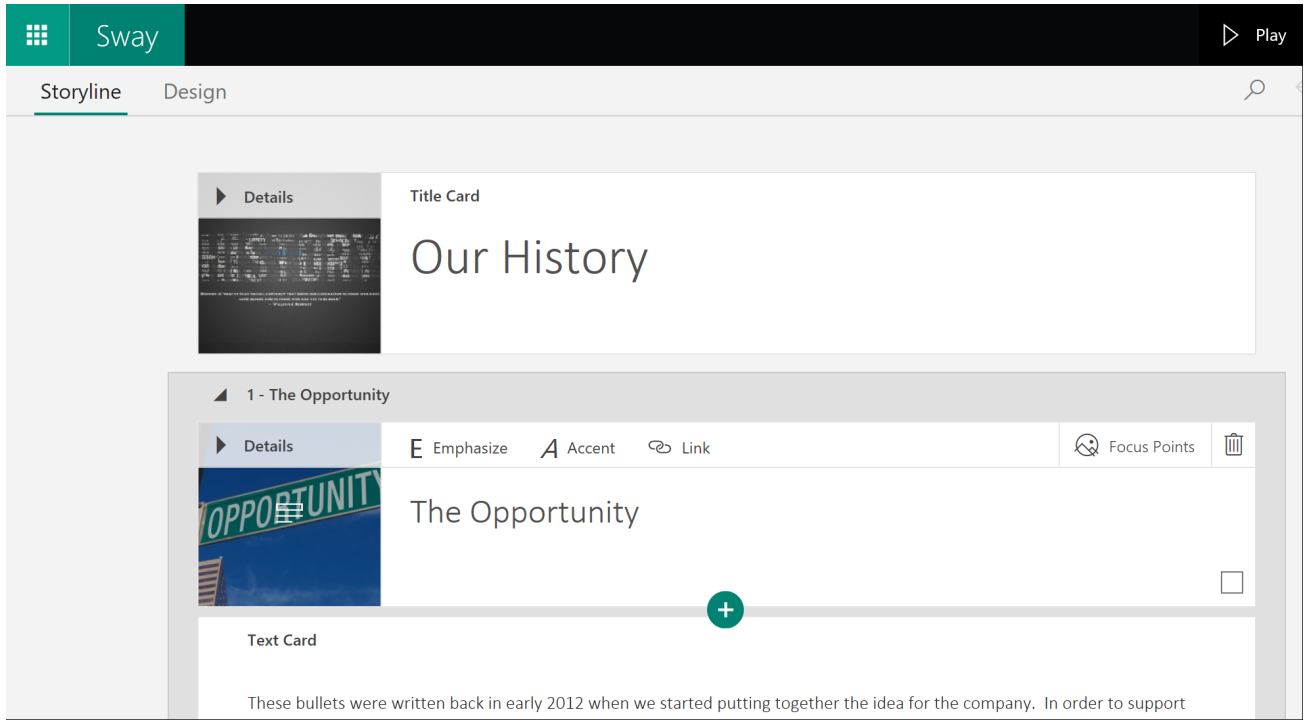
Features: Develop content quickly and share easily

Use Cases:

1) Often re-used full-screen presentations
2) Photo-driven presentations
3) Shared stories

External Use: Yes

Mobile App: No



Yammer

Purpose: Internal social network / message board

How to access: https://www.yammer.com

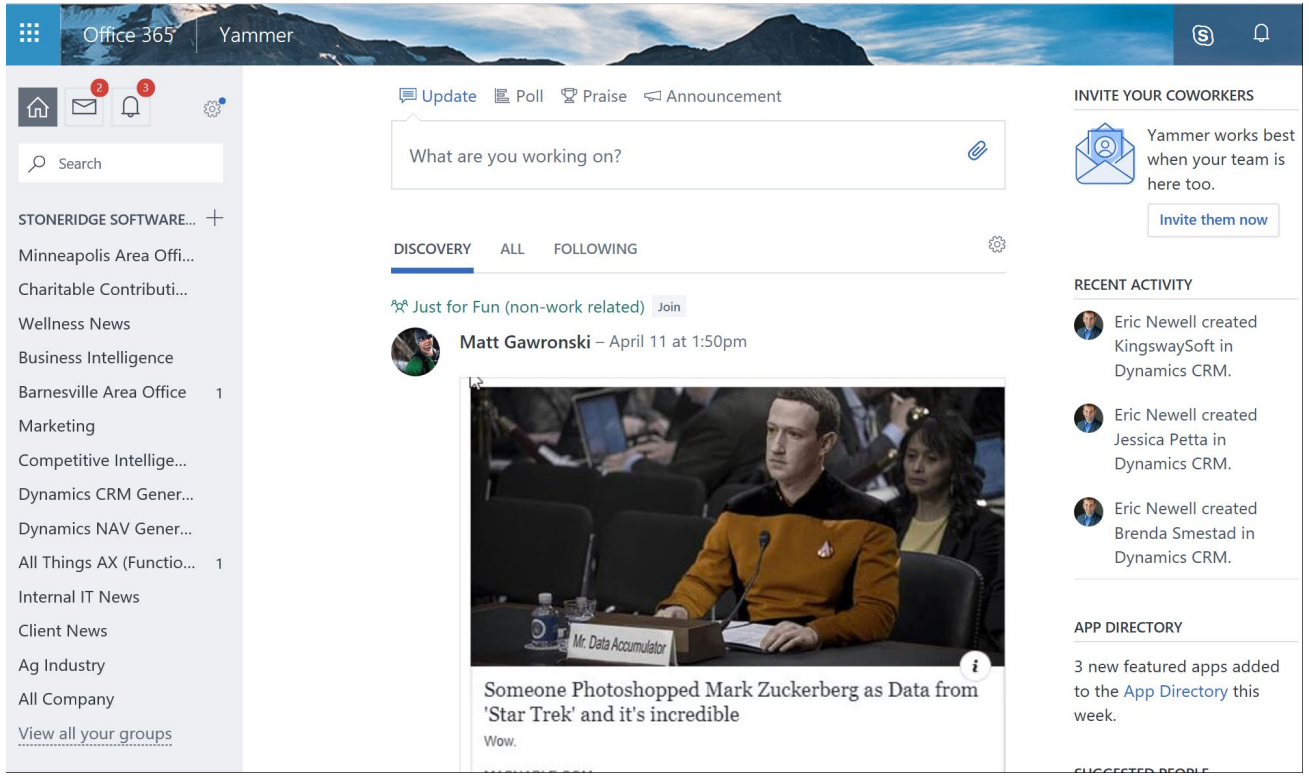
Features: Post content and links and share them with interested groups

Use Cases:

1) Create internal and external networks
2) Share links and posts
3) Take questions and post answers to the community

External Use: Yes

Mobile App: Yes



Workplace Analytics

Correlation to engagement created the business case for change

		KPIs significantly correlated to survey response		
Theme	Workplace Analytics KPI	Engagement	Innovation	Enablement
Meeting Sprawl	% Meeting hours with 21+ attendees	↓	↓	↓
	% Recurring meetings		↓	
Manager Access	Manager conflicting meeting rate	↓	↓	↓
	% Meeting Hours with Manager			↑
Network Growth	Network Insularity	↓	↓	↓
	Manager's Internal Network Growth	↑	↑	↑

Positive Correlation

Negative Correlation

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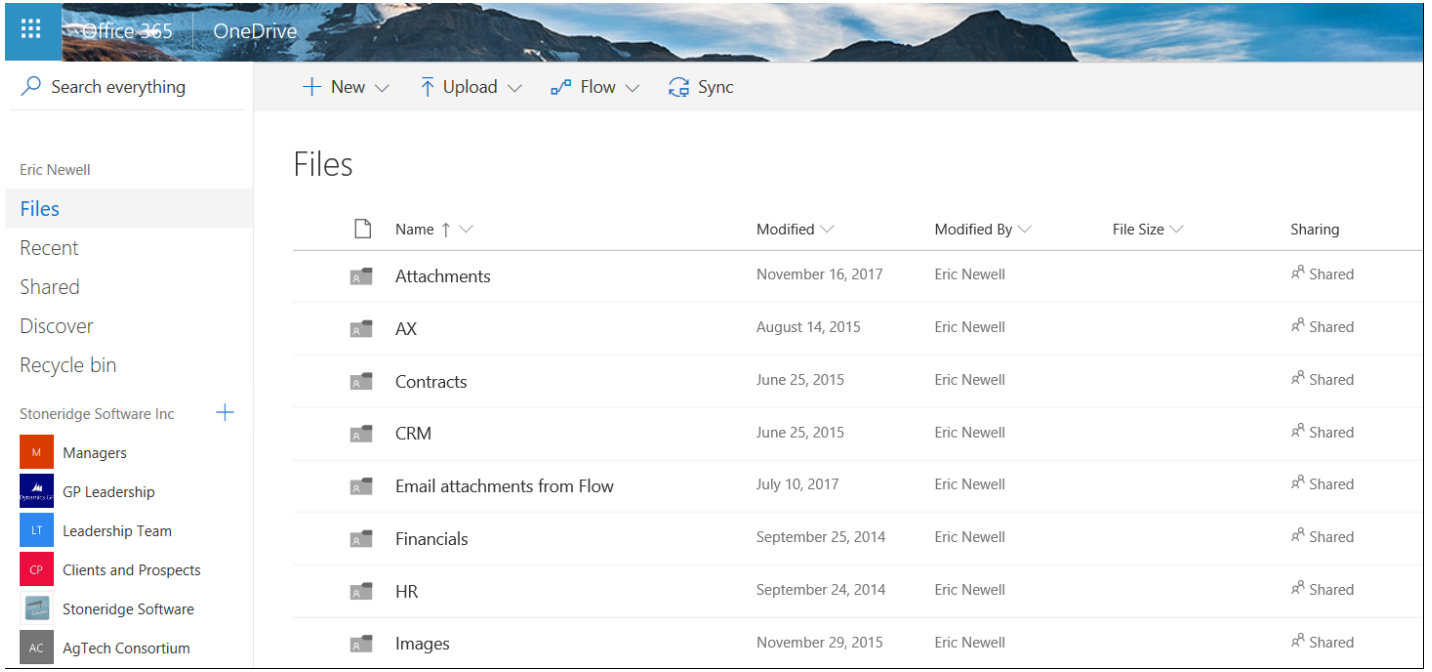
Where to Start

Put Your Documents in the Cloud

OneDrive for Business

https://portal.office.com and click on OneDrive

- Click Sync
- Features
  - 1 TB space
  - Documents available anywhere
  - Share files with selected people
  - Everything backed up automatically



Use OneDrive for personal documents

Use Teams/SharePoint for shared documents

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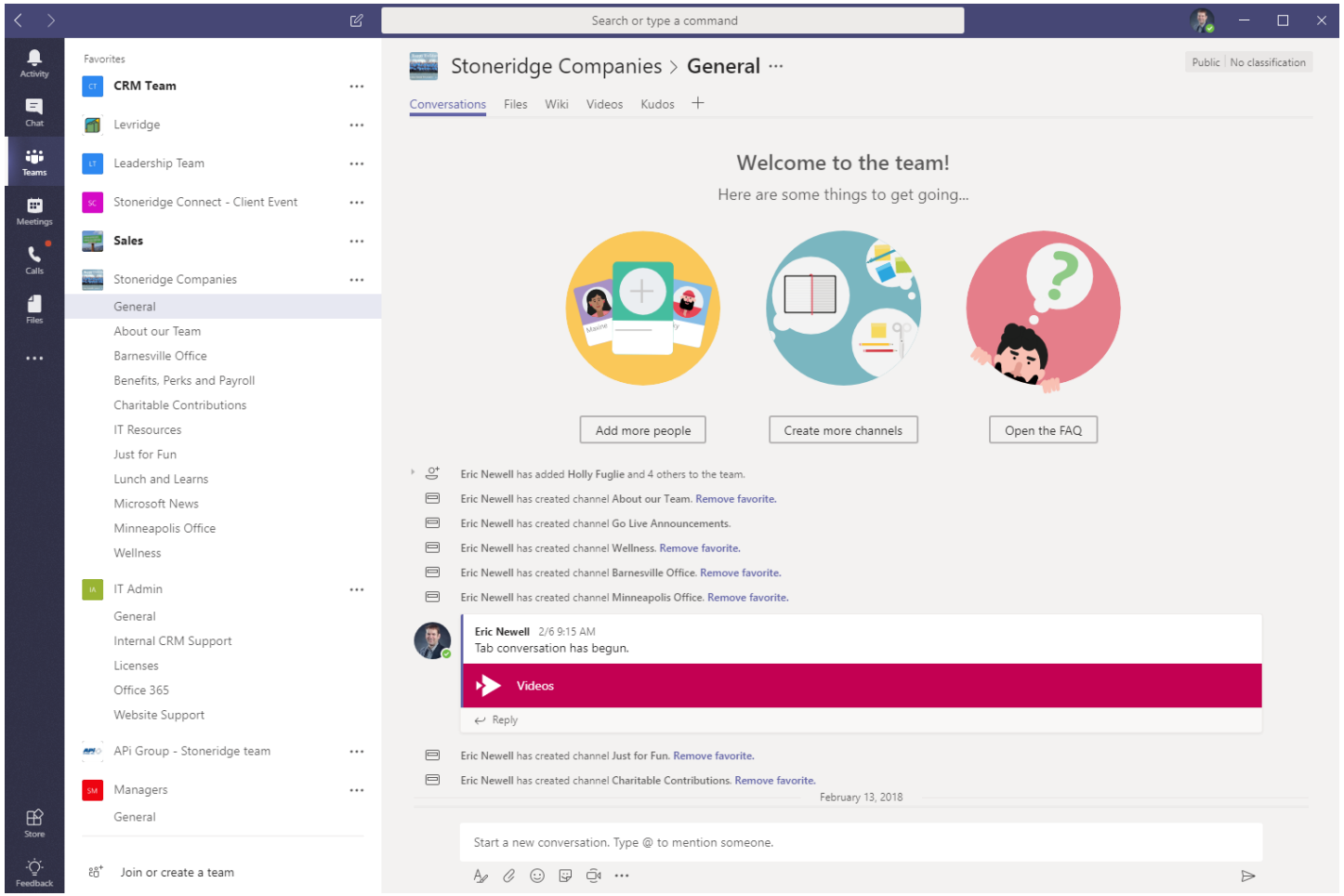
What is Teams?

New Microsoft tool that serves as a collaboration and communication hub for all of Office 365 with deep integration across all applications.

Features

- Instant Messaging/ Phone / Meetings
- Conversations
- Organize files
- Collect relevant OneNote notebooks
- Planner boards
- Link to any webpage
- Edit Microsoft documents within the Teams interface
- Search through documents, instant messages and channels

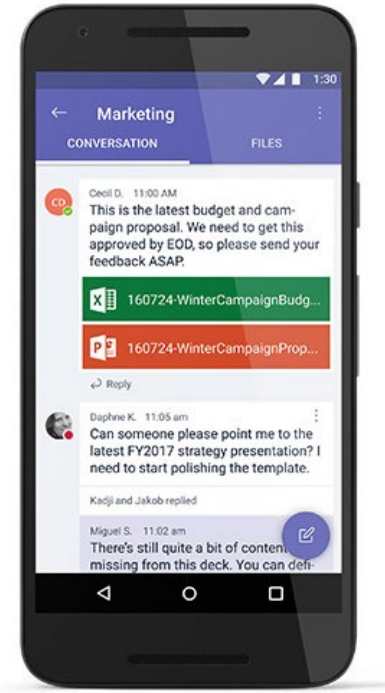
3 Modalities



1) Desktop Client
2) https://teams.microsoft.com
3) Mobile client

Desktop client and website look the same – the only difference is some websites don't render in a frame on the website

Desktop client can be downloaded from https://teams.microsoft.com/downloads



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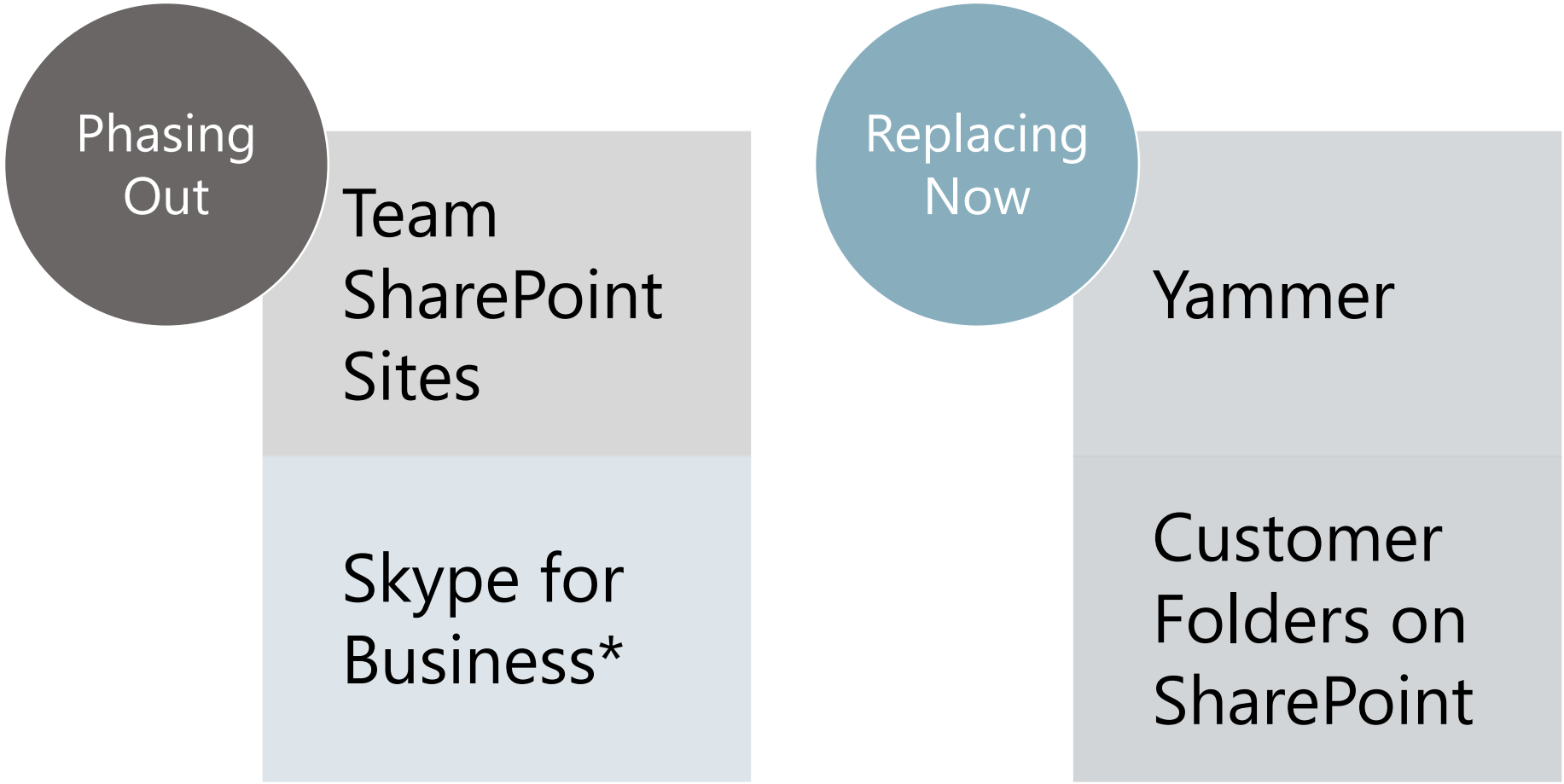
Teams Replaces Other Tools Over Time



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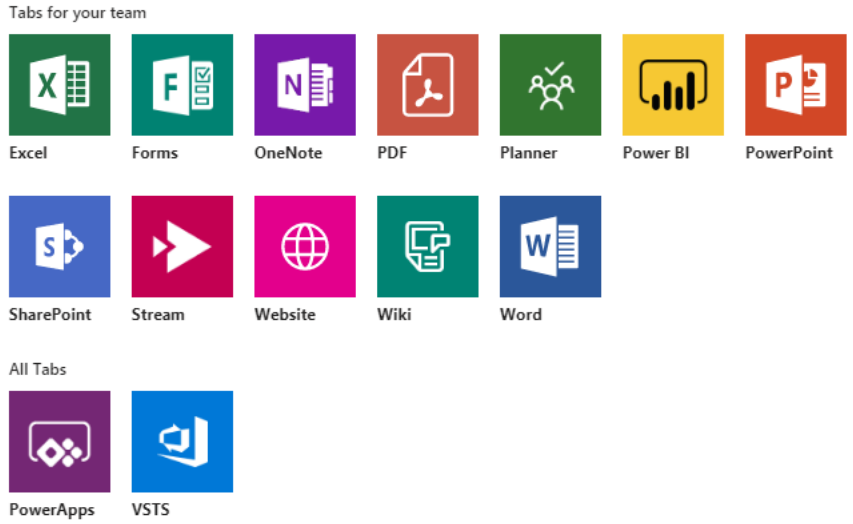
* Microsoft will be replacing Skype for Business with Teams later this year

Teams vs Channels

- Teams control permissions and relate to an Office 365 group
  - Each team automatically creates a “General” channel
- Channels are children of Teams and serve as a repository of information on that topic
  - Can be set to favorite or not (individuals can choose not to see certain teams)
  - Container for several different apps



Governance

- Each Team should have an owner who is responsible for the channels and the cleanliness of the file structure
- People requesting a new channel (outside of new clients or prospects) would go to the Team governor
- Recommended quarterly clean-up reminder on the calendar
- Create an “Archive” file in the File area to move all old files

Resources

- Microsoft Cloud Training
  - https://support.office.com/en-us/article/get-trained-on-the-microsoft-cloud-6ab4bbcd-79cf-4000-a0bd-d42ce4d12816?wt.mc_id=otc_home&ui=en-US&rs=en-US&ad=US
- Getting Started with Office 365
  - https://support.office.com/en-us/article/Get-started-with-Office-365-for-Business-d6466f0d-5d13-464a-adcb-00906ae87029
- Enterprise Productivity
  - https://products.office.com/en/business/enterprise-productivity-tools
- Blog on using Planner for Level 10 Meetings
  - https://stoneridgesoftware.com/leadership-meetings-using-office-planner/

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Thank You