

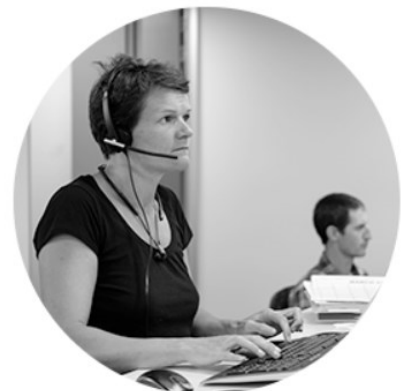
Harnessing the power of Teams

Key things to get right from the start
or address now if you are underway

Whitepaper by:

Grant Margison, Director & Co-founder

January 2020



let's make work better

A. Teams – the benefits of everything available in one place

Teams is an interface that brings together the majority of information users need on a day to day basis.

Office 365 and Teams can provide functionality central to how people work in creating and using documents. In particular, it allows everything to be brought together on a topic or task, on your PC, phone or tablet:

- Teams for communications, chat, tracking tasks and in doing so reducing email use (that in turn reduces business risk)
- Tracking and coordinating progress (e.g. customer or regulator requests, submissions review and followup)
- Tracking and managing tasks with Planner – giving views by Team or topic as well as “My Task”
- Lists for contacts, risk register, key dates, training schedules, news, agendas
- Publishing current versions of key documents such as policies, approved meeting minutes in Channel tabs for quick reference
- Embedding business processes, forms and actionable reporting with the Power Platform
- Managing all aspects of project initiatives

Reducing information risks through:

- **Less work done by email** so more visibility of reasoning for decisions and action, within Teams. Key decisions in chat can be copied/pasted into a document to be held in TRIM.
- **Less file share use.** Moving away from using the file share for working and collaboration will have an immediate benefit for the Information Management team who will now have visibility of files stored outside TRIM. This will also cut down duplication, mistaken use of old material and information not known about that might impact on a decision or should be available for LGOMIA or LIMs.

This includes benefits across common business activities that to do well need a mix of documents, data, lists, collaboration, access to reference information and process. For instance:

- Intranet – working here; news; links; social
- Policies and Procedures – internal and external
- Major Report creation
- Customer/other formal requests – tracking, collaboration and decision making, reply approvals
- Submissions and initiating/tracking work from these
- Online forms & automation – for internal and potential external and/or contractor use
- Agreements and Contracts – publishing (with security trimming) to workareas
- Meeting process, including minutes, background information
- Health & Safety reporting, hazard ID, accident followup, training and refreshers
- Recruiting & Training processes, personnel files
- Standard up to date approved templates, checklists and forms
- Managing assets, maintenance schedules, work packets, as-built/photos/video upload and convenience viewing, including on mobile devices

Potential Problems



Confusion

Teams can proliferate, causing confusion about which Team to use and where to find content. It is not easy for users to get an idea of all of the available Teams and their context. Eventually many users return to email for collaboration...



Permissions

Group membership for a Team can be haphazard. This means that people who need to contribute (or access the content at a later date) are potentially excluded. Group membership is natively static, so if a new person joins or someone leaves, or is transferred, then the permissions need to be manually updated.

Out of the box, if you are a group member then you have administrator rights to the underlying SharePoint site and library. This can lead to inconsistencies that make it harder to use and find content when there are hundreds or thousands of Teams.



Data Loss & Unavailability

Team owners can delete Teams when they are done. This doesn't allow for retention of information that may need to be accessed later, compliance obligations or access by a wider audience.



ECM Aspirations?

Teams created with ad-hoc names, membership, purpose and structure can be problematic. Meeting compliance and findability requirements (as well as reducing the risk of information accidents) necessitates a consistent structure and approach.

B. Harnessing the power of Teams: Intuitive consistent structures

Without structure

Users want it to be easy and obvious where to file, work with content, collaborate, search and process information. If this isn't the case for them and their work groups, then they are likely to create this convenience themselves:

- on fileshares or OneDrive;
- within their own structures via microservices;
- or through ad-hoc creation and use of Teams. As every Team created has its own document library, content is dispersed. This creates the problems most organisations have with out of control file shares, but in effect you now have hundreds or thousands of these – with different structures and permissions, and no overall sense for people where they should file or find content. From this information accidents rise, with people acting on partial information as well as frustration and losing time from trying to find content.

When everyone acts on personal preference, teamwork and consistency of delivery suffers.

What structure looks like

Teams deliberately designed...

...for convenient and intuitive access to all workgroups and apps; based on an enduring underlying structure and common interface prompts.

The screenshot displays the Microsoft Teams interface. At the top, a search bar prompts the user to 'Find any Teams, channels or content I am a member of'. The left sidebar shows a list of teams under the heading 'Your teams'. These teams are categorized into three groups with colored arrows pointing to them:

- ACTIVITY TEAMS for the work our Dept does** (orange arrow): Includes 'Water Supply Services', 'Water Supply Communic...', 'General', 'Resources', and 'Start a campaign'.
- MEDIUM-LONG TERM PROJECT WORK I am involved in** (blue arrow): Includes 'Main Line Rebuild', 'General', 'Communications with Third Par...', 'Contractors and Partners', and 'Contracts'.
- SHORT TERM case file (e.g. jobs, customers, assets) work I am involved in** (green arrow): Includes 'Merivale Water Conta...', 'Burst Mains on High St...', 'Bromley Base Station ...', and 'Papanui Road Trunklin...'.

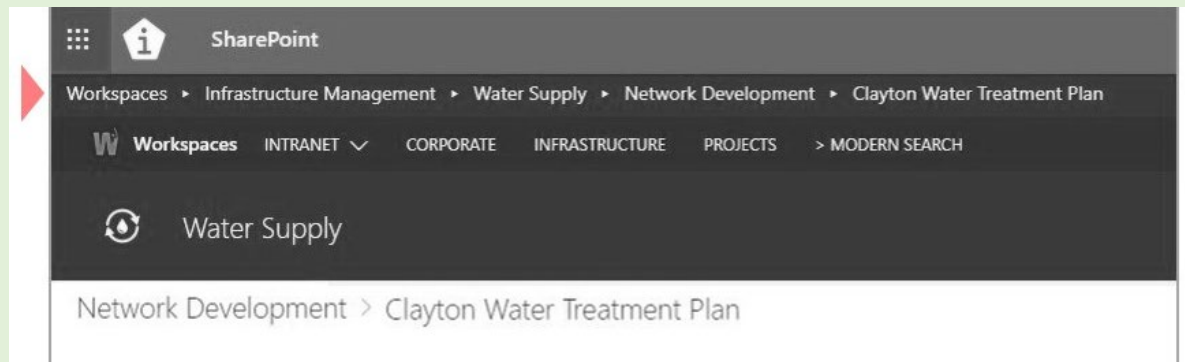
The main pane shows the 'Contractors and Partners' channel within the 'Main Line Rebuild' team. It displays a list of documents with columns for 'Type', 'Name', and 'Modified'. The documents include:

- Letter on proposed changes to monthly reporting.docx (Just now)
- Guidelines for Mowing - Dec 2019.docx (Just now)
- Queen St planned shutdown 11Jan 2020.docx (Just now)
- Health and Safety guidelines for new contractors.docx (Just now)
- Letter to AS contractors - budget overrun.docx (Just now)
- Letter to John Smith.docx (1m ago)
- Report into Western Business Park.docx (1m ago)
- Water Supply Development Instructions.rtf (1m ago)

At the bottom, a caption reads: 'Contractor and Partners Tab for the Mainline Rebuild MEDIUM-LONG TERM PROJECT'.

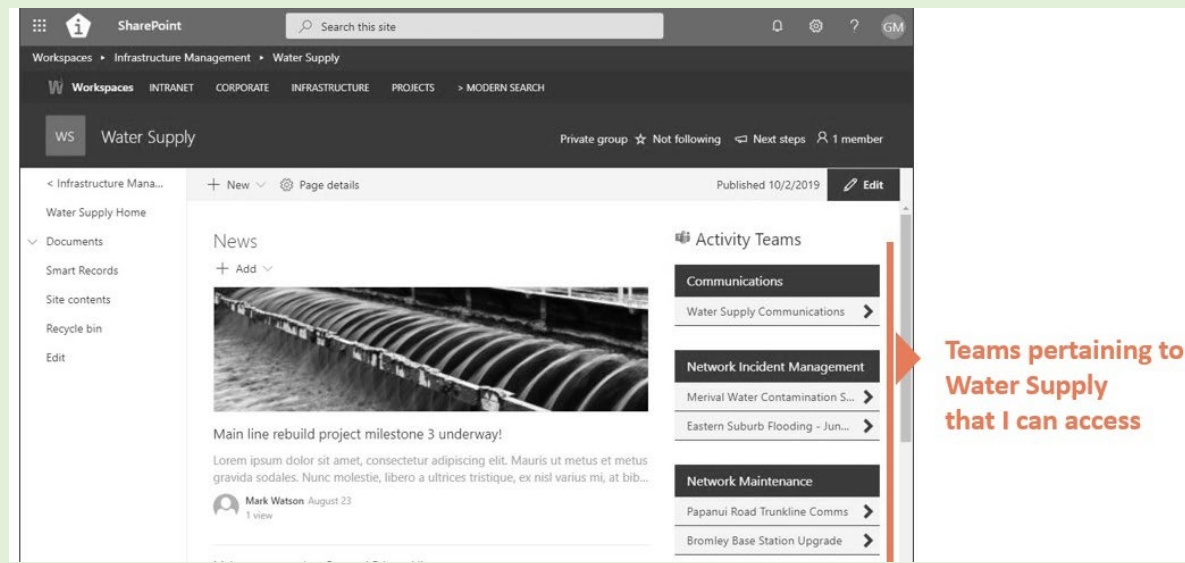
Breadcrumbs...

...to provide context and sense of place so that you know where you are in either Teams or SharePoint.



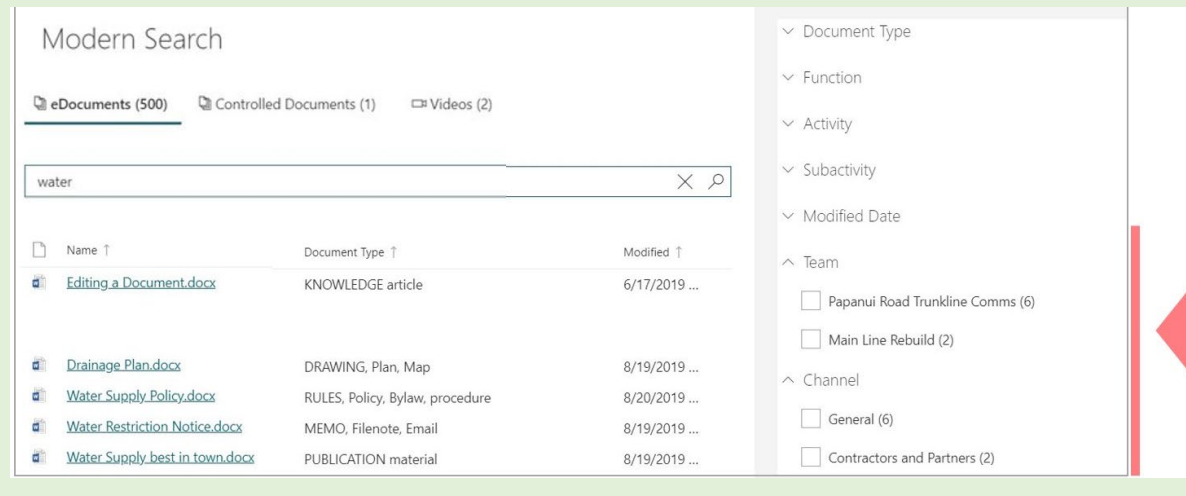
Navigation...

...is logical and lets you access both the Team and the underlying SharePoint site (along with it's libraries and other information tools). This can be setup to automatically be updated to include new or changed Teams as they are added.



Search with refinement by Team & Channel

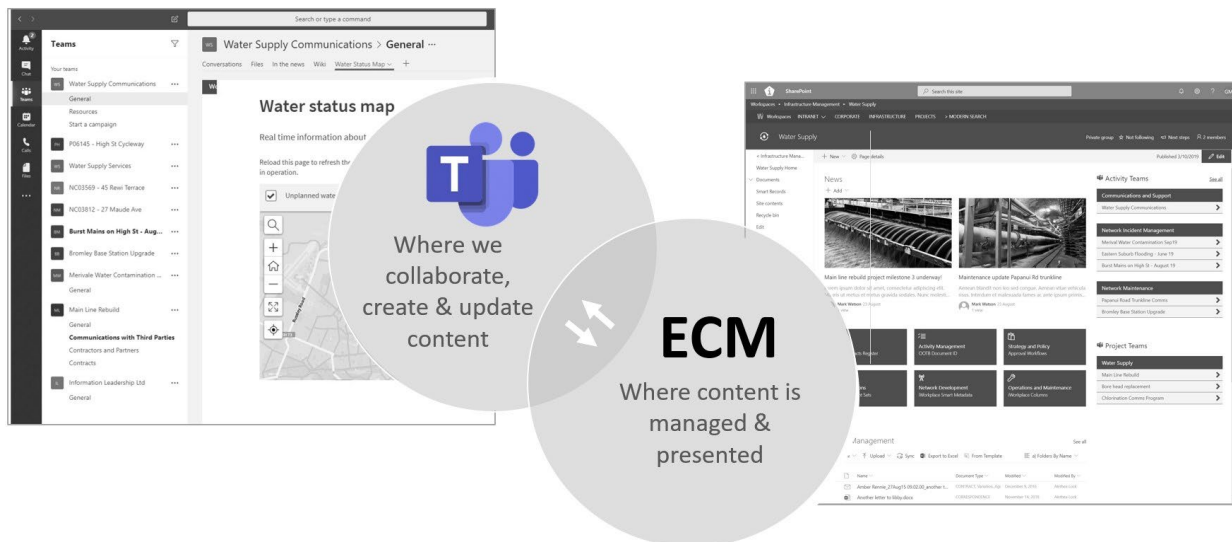
so it is easy to zero in on content, whether it is held in your ECM or Teams document libraries



The outcome

Teams and SharePoint as your ECM (Enterprise Content Management System) are complementary interfaces:

- **Collaboration centric** - Teams provides a view of all the activities I am doing with others, plus access to content and tools as I need them
- **Content centric** - ECM brings together all information, no matter how it was formed, in one place for an activity, case file or topic



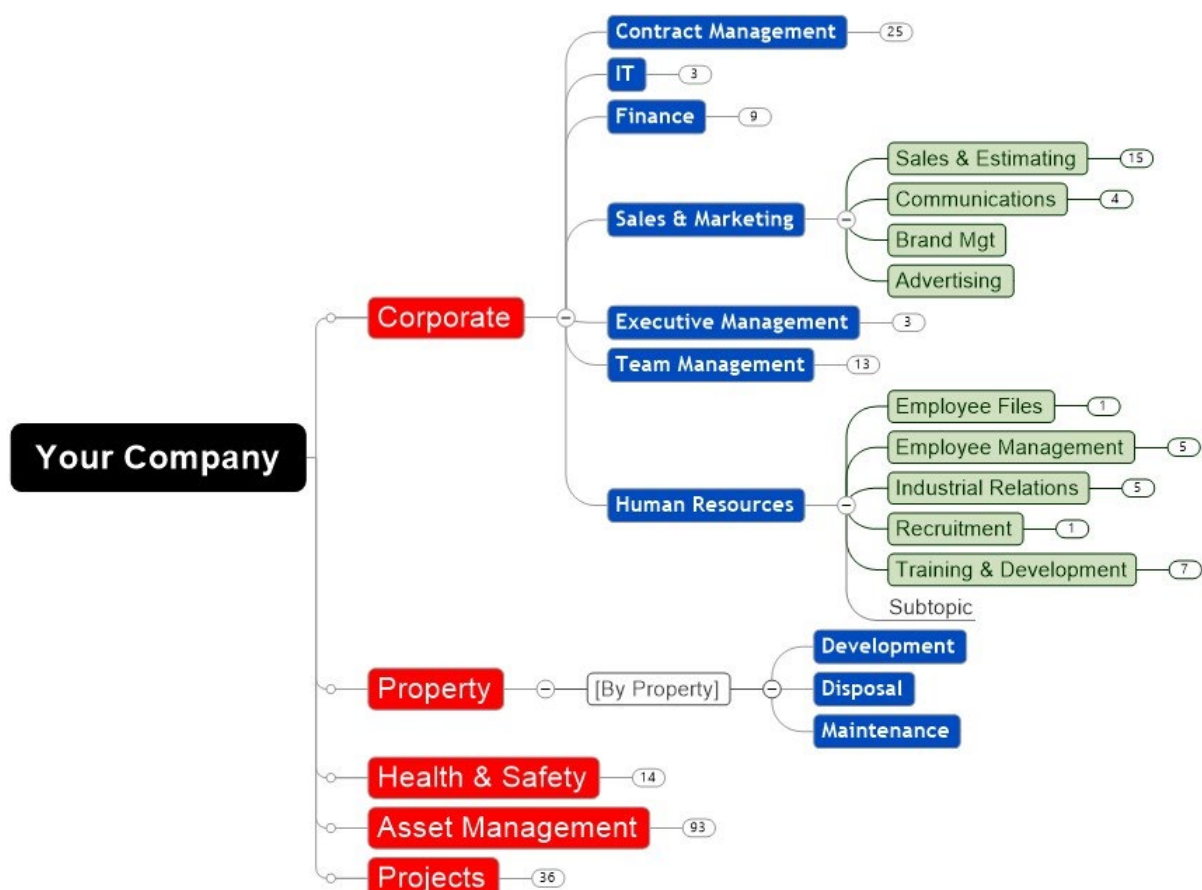
C. How to design and maintain structure

Dealing with scale

When you have a handful of sites or Teams, structure doesn't really matter to much. With tens, hundreds or thousands of sites you need to be able to **organise sites and Teams in logical and intuitive ways**. This type information structure is known as a taxonomy or business classification. Taxonomy provides the structure needed for users to be able to easily **find** Teams and **understand their context** as they are rolled out over time.

The example below shows a typical structure

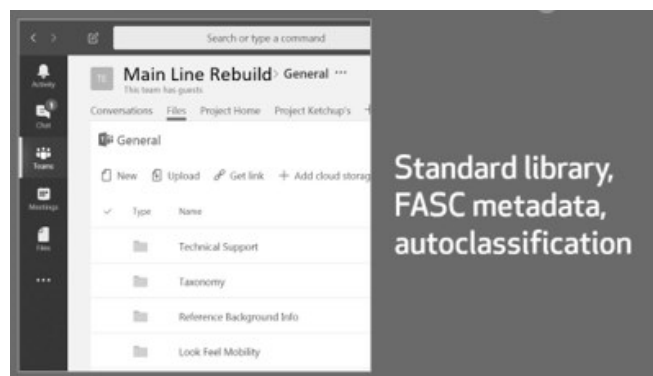
- the first (red) tier are **F**unctions of the organisation that have
- **A**ctivities (blue) and in turn these have
- **S**ubactivities (green)
- Sometimes **C**ase files are needed, like "By Property" below to group together all the information about each of them). The **FASC** is a sound way of structuring and categorising information, Teams and SharePoint lists and libraries.



Autoclassification

In addition to a taxonomy for sites and Teams, additional **metadata on the files** themselves provides additional **structure** and **ease of use**.

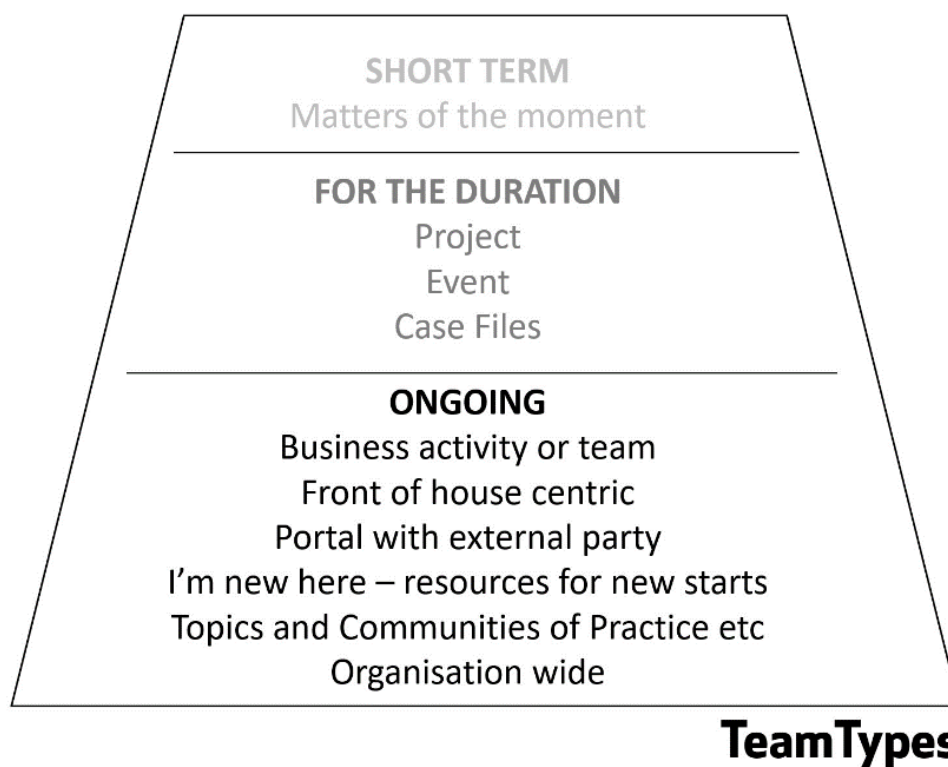
You should **design for autoclassification** – automatically assigning metadata for search; browse; retention & disposal; and business process, **without expecting users to enter it**. This includes inheriting metadata from folders and inferring it from rules based on file names and file content.



Standardised TeamTypes

Be clear about the **purpose and audience** of Teams to stop confusion and sprawl.

Your organisation can have standardised 'TeamTypes' each with its own pattern of consistent Team settings, channels, tabs and document libraries.



When a group of people wish to collaborate in a Team, there are simple rules to guide them to which TeamType is needed. Auto-provisioning (see below) then allows the Team to be stamped out.

Users are subsequently free to refine and add extra tabs etc as needed (e.g. add a tab to surface a key document, list or access to content from a URL).

Allows for and encourages widespread Teams use

Over time coverage of Teams use grows and matures. The taxonomy tagging makes it easier to understand where information and collaboration is, and helps avoid duplication or confusion. Over time the organisation moves to more and more Teams use:

Information Structure & initial Teams use			Teams @ month 2		
Elections		Stormwater	Elections		Stormwater
Democratic Services		Roading	Democratic Services		Roading
Mayoral Office	INFRASTRUCTURE	Wastewater	Mayoral Office	INFRASTRUCTURE	Wastewater
Delegations		Solid Waste	Delegations		Solid Waste
Council Controlled Organisations	GOVERNANCE	Water Supply	Council Controlled Organisations	GOVERNANCE	Water Supply
Iwi Engagement			Iwi Engagement		
Executive Management		Animal Control	Executive Management		Animal Control
Fleet Management	REGULATORY	Building Control	Fleet Management	REGULATORY	Building Control
Risk Management		Building Consents	Risk Management		Building Consents
Legal		Resource Mgmt Planning	Legal		Resource Mgmt Planning
Contracts, Leases and Agreements		Development Contributions Admin	Contracts, Leases and Agreements		Development Contributions Admin
Organisation Administration	CORPORATE SERVICES	Environmental Health	Organisation Administration	CORPORATE SERVICES	Environmental Health
Team Management		Alcohol	Team Management		Alcohol
Communications			Communications		
Finance		Community Funding	Finance		Community Funding
Rating		Community Grants	Rating		Community Grants
Information Services	COMMUNITY SERVICES	Community Planning	Information Services	COMMUNITY SERVICES	Community Planning
		Rural Fire			Rural Fire
Bylaws		Emergency Management	Bylaws		Emergency Management
Monitoring and reporting		Community Groups	Monitoring and reporting		Community Groups
Council Strategies		Community Committees	Council Strategies		Community Committees
Regional Policies and Strategy	POLICY & PLANNING		Regional Policies and Strategy	POLICY & PLANNING	
Govt legislation and Policies		Aquatics	Govt legislation and Policies		Aquatics
Reserves Management Plans		Cemeteries	Reserves Management Plans		Cemeteries
District Planning	COMMUNITY FACILITIES	Marketing & Promotion	District Planning	COMMUNITY FACILITIES	Marketing & Promotion
Long term Planning		Council Property	Long term Planning		Council Property
Council Policies		Halls and Recreational Complexes	Council Policies		Halls and Recreational Complexes
Annual Planning		Libraries	Annual Planning		Libraries
		Nursery			Nursery
Promotions and Events		Parks and Sports Grounds	Promotions and Events		Parks and Sports Grounds
Tourism		Public Conveniences	Tourism		Public Conveniences
Research and Reporting	ECONOMIC DEVT		Research and Reporting	ECONOMIC DEVT	
Business Development Assistance			Business Development Assistance		
Economic Development			Economic Development		

Elections		Stormwater	Elections		Stormwater
Democratic Services		Roading	Democratic Services		Roading
Mayoral Office	INFRASTRUCTURE	Wastewater	Mayoral Office	INFRASTRUCTURE	Wastewater
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Legal		Resource Mgmt Planning	Legal		Resource Mgmt Planning
Contracts, Leases and Agreements		Development Contributions Admin	Contracts, Leases and Agreements		Development Contributions Admin
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Information Services	COMMUNITY SERVICES	Community Planning	Information Services	COMMUNITY SERVICES	Community Planning
		Rural Fire			Rural Fire
Bylaws		Emergency Management	Bylaws		Emergency Management
Monitoring and reporting		Community Groups	Monitoring and reporting		Community Groups
Council Strategies		Community Committees	Council Strategies		Community Committees
Regional Policies and Strategy	POLICY & PLANNING		Regional Policies and Strategy	POLICY & PLANNING	
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Council Policies		Halls and Recreational Complexes	Council Policies		Halls and Recreational Complexes
Annual Planning		Libraries	Annual Planning		Libraries
		Nursery			Nursery
Promotions and Events		Parks and Sports Grounds	Promotions and Events		Parks and Sports Grounds
Tourism		Public Conveniences	Tourism		Public Conveniences
Research and Reporting	ECONOMIC DEVT		Research and Reporting	ECONOMIC DEVT	
Business Development Assistance			Business Development Assistance		
Economic Development			Economic Development		

Users request Teams, that have libraries created with metadata tagging to the Objective taxonomy

 [Request a new Team](#)

 [Create a new Project](#)

- Teams are seen and can be searched for in overall navigation menus
- Teams related to a business activity can be grouped together to make it clear what information is available and in use
- Breadcrumb shows metadata tagging (eg Environmental > Noise Control > Complaints)
- Overall search can be refined by this tagging as well as Team and Channel name

Content in all libraries can be reported on, spliced and diced and have global actions taken based on rules. This includes updating metadata, adding metadata based on what is in the document, retention and disposal, copy to Objective (based on work done in this initiative).

Kondo¹ your Teams!

Review Teams to remove clutter and confusion over where we collaborate.

Our recommended process is:

- A Power User level resource works with departments or workgroups to review their Team needs, based on the TeamType model;
- Teams not needed are deleted after content that needs to be kept is copied out; then
- Teams to be kept are standardised with automated provisioning tools that the Power User triggers.

New Teams are created as needed so workgroups have the right mix of TeamTypes and there is no confusion on when to use what.



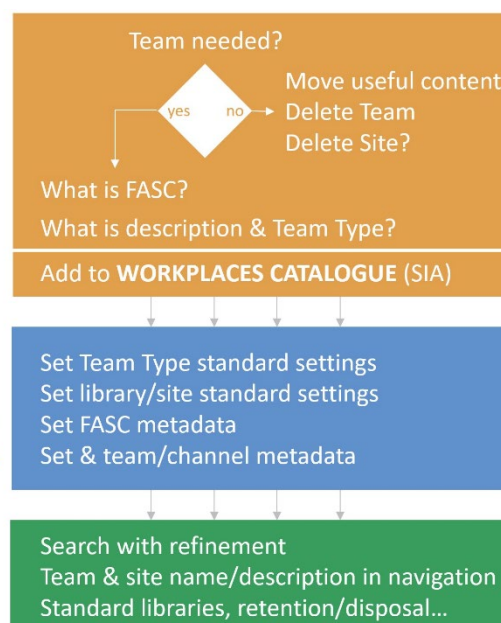
WORK WITH TEAM USERS



STANDARDISE TEAM & SITE PROCESS RUNS

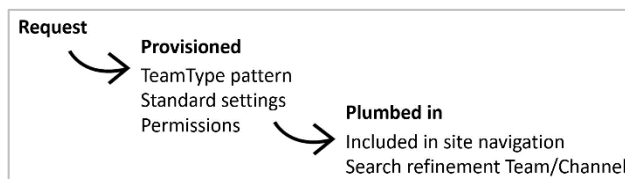


READY FOR USE



Auto-provisioning

Empowers human teams to create what they need in consistent ways with the minimum of effort – building in the standardisation above. Typically it can take just 10 minutes to provision a Team for a user.



Provisioned sites and Teams will automatically be tagged with the FASC business classification to power search, browse, processing, breadcrumbs and menus.

The screenshot shows the SharePoint 'New item' form. On the left, there are two options: 'Create a new Project' (with a SharePoint icon) and 'Request a new Team' (with a Teams icon). The main form area has a 'Save' button and a 'Cancel' button. Below these are input fields for 'Title *', 'Short Title', 'Description', and 'Site Status'. The 'Title' field has a placeholder 'Enter value here'. The 'Short Title' field has a placeholder 'Enter value here' and a note 'Used when creating the URL. If you do not enter a value then this will be automatically created from the Title'. The 'Description' field has a placeholder 'Enter value here' and a note 'Site Description'. The 'Site Status' field has a radio button selected for '01 Request'.

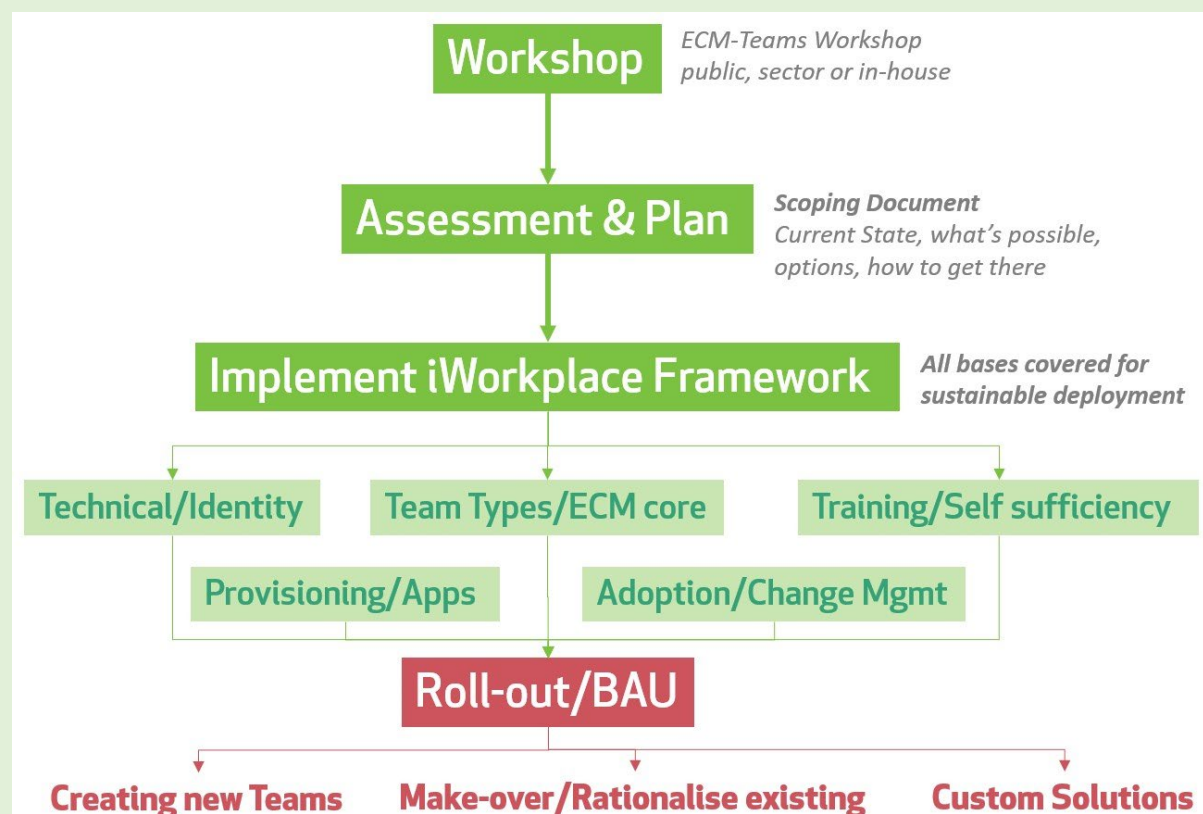
¹ Marie Kondo, author of "The Life Changing Magic of Tidying Up"

D. How we can help

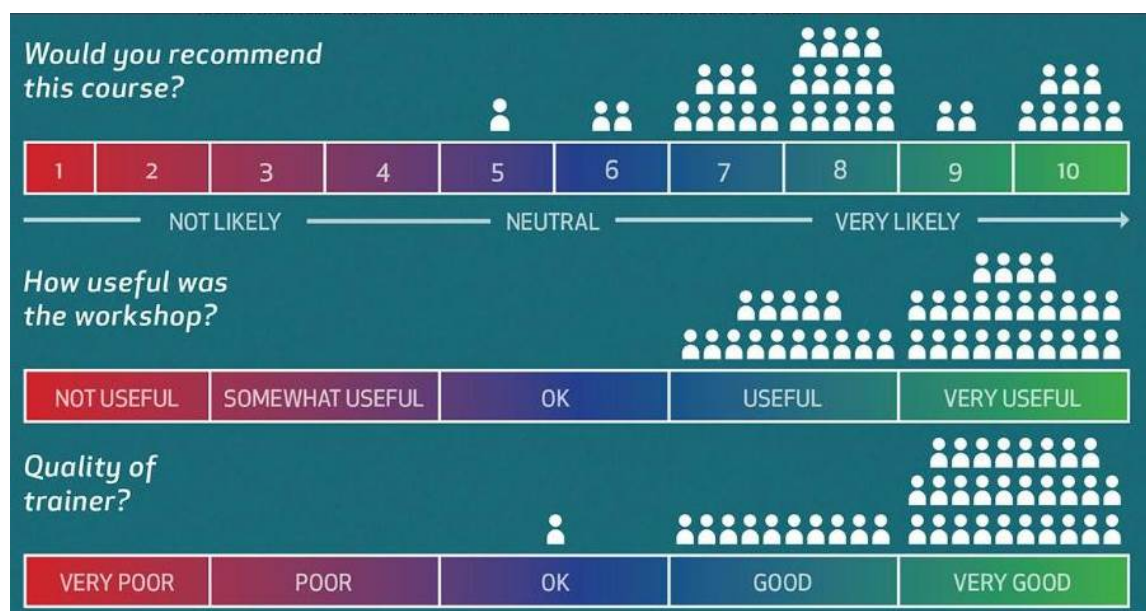
You can build your understanding and move ahead with Teams via:

1. **Teams Workshop** – inhouse or public - to unpack good practice and how you can move from where you are now. This can include technical, BA and change/governance streams for different internal audiences.
2. **Teams Assessment and Plan** to review your current state, and build out a plan. This would involve looking at Teams use and tenancy settings and working through the options you have. Following this, we would help you to form an actionable plan that's focused on:
 - creating the necessary information structures;
 - a review of existing Teams and 'making over' or retiring those that are no longer needed; and
 - training your staff to do as much of the process as you wish. This includes preparing Power Users for supporting business as usual (working with workgroups to help them get the right combination of Teams, provisioning new Teams and monitoring Teams use).
3. **Non-functional checklist:** We can review a range of technical settings and details in order to get Teams working properly. This covers settings, configuration and potentially troubleshooting tenancy settings, network configuration and desktops. We can provide this checklist and then potentially help you get things sorted.

Teams assessment and plan



4. **Office 365 strategy and tactics one day workshop**, so you can see and understand best practice, what other NZ organisations are doing and start forming a roadmap to get the most from Office 365 and Teams. We regularly run public workshops but can also do a customised in-house workshop that zeros in more on your situation. Here is feedback from attendees on three recent Office365 strategy workshops we ran across NZ:



5. **Get the iWorkplace Teams Toolset** that you can use yourself or we can run as a service. This includes setting up:
- **Provisioning** lists and Flow based approval workflows. This allows users to request a Team and once the request is approved, a standardised Team and Site is created that is plumbed into your ECM structure and navigation
 - **Standardised assets.** Document library, site and Teams templates for FASC and TeamTypes for your organisation
 - **Configuring search** with our iWorkplace templates so it can be refined by Team and Channel
 - **Autoclassification** and tricky security handling via iWorkplace Smart Metadata and Smart Case Files Apps
 - **Navigation menus and breadcrumbs** - using and configuring Team navigation menus within SharePoint
 - **Make-over process for existing Teams** - a process to use above to review existing Teams and retrofit as needed

Appendix 1: About Information Leadership



Preferred

Content Services



Content Services
Partner Program
Charter Member

Information Leadership specialises in enterprise grade digital workplaces and ECMS/EDRMS for public and private sector. We are one of only 24 partners from around the globe selected for our Compliance, Advisory & Implementation services.

Microsoft say: **“Our charter partners are being recognised for their proven success in high-impact scenarios and workloads”**

resources.techcommunity.microsoft.com/microsoft-content-services-partner-program/

What customers say

informationleadership.co.nz/about-us/what-our-customers-say/

How we work with customers

informationleadership.co.nz/about-us/vision-values/

Offices

In Wellington, Christchurch and Auckland with a presence in Hamilton, Palmerston North and Dunedin.

A selection of our Office 365 / SharePoint customers:



Office 365 Digital Transformation: Winner at Partner of the Year Awards 2019

Information Leadership's Office 365 digital transformation at Todd Energy won the "Empowering Employees" award and was highly commended for the "Modern Workplace" award. No other case study got two awards.



Our customers from Todd Energy, James Blair and Stephanie Richardson, joined us at the awards to celebrate our shared success

"Fantastic example of a comprehensive Stack combined with Power Platform, creating both additional value and greater collaboration" - Microsoft's award comment

Since their go-live, Todd Energy staff, from the warehouse team to operations management, have been creating and consuming information seamlessly via Office365's Teams, Azure, Delve, Stream, Planner, Power Platform and SharePoint.

The digital transformation helps fuel collaboration, productivity and reduced engineering risks with:

- Anytime, anywhere working
- Better hazard identification and communication
- Reporting on production and maintenance
- Collaborating on projects
- Greater productivity

"We consider Information Leadership a true partner: we partner with organisations where it's a two-way street - not just a vendor/supplier arrangement. We want the people we select as partners to be part of the team" - James Blair from Todd Energy sums up their relationship with Information Leadership as implementation partners

Get the case study



informationleadership.co.nz/sub/contact

Microsoft recognises Information Leadership as world leader 2018/2019/2020

4 October 2018 - Christchurch-headquartered Information Leadership has been announced as one of 24 companies globally that are Charter Members of Microsoft's Content Services Partner Program for FY19 and is the only New Zealand company in this select group.



'Content Services' are also referred to as 'Enterprise Content Management' and include document management, intranet, workflow, records management and knowledge management tools and systems.

Information Leadership is also the only company in Asia-Pacific to be recognised in the Advisory and Implementation categories.

Microsoft New Zealand's National Technology Officer, Russell Craig, says Information Leadership has a long-standing and well-deserved reputation as a leader in enabling organisations to unlock the power of information and knowledge.

"Following being named Microsoft New Zealand Government Partner of the Year for 2017, it is exciting to see Information Leadership become a Charter Member of our global Content Services Partner Program.

We are seeing Microsoft customers increasingly move to modern approaches to enterprise content management. It's great to know that we have a world-leading content services partner able to assist them" – Russell Craig, Microsoft NZ National Technology Officer

Microsoft Government Partner of the Year 2017

In April, Information Leadership won Microsoft Government Partner of the Year ahead of other finalists in the category that included high profile multinational companies.

Information Leadership drives its success through its innovations in designing and implementing Microsoft's SharePoint and 365, which make them ideal platforms for bringing **sophisticated but easy to use digital tools to the public and private sectors.**



Information Leadership Director, Sarah Heal, who received the award said: "Our innovative iWorkplace SharePoint methodology gives organisations **digital workplaces at a fraction of the cost of commercial off-the-shelf products or heavily customised SharePoint deployments.** This includes a full range of intranet, extranet, collaboration, customer portal, workflow and forms, document management and mobility solutions.