

# Enhancing Project Management with Office 365

Using the tools you own to be improve project coordination and collaboration

*Presented for the Technology Today Series hosted by the Texas Department of Information Resources.*

*Sponsored by the Texas Association of State Systems for Computing and Communications (TASSCC)*



2019 Partner of the Year Winner  
PowerApps Award  
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8/8/2019

# | Agenda

- > Introductions
- > Project Management Overview
- > Small, Medium, and Large Scenarios
- > High Level Technology Overview
- > Structured Approach for Implementation
- > Q&A

# Introductions

NAME	ROLE/TITLE	RESPONSIBILITIES
Michael Kennedy	Director of Public Sector	<ul style="list-style-type: none"> <li>Owns the overall relationship with the State of Texas &amp; Agencies</li> <li>Coordinates programs for agencies with Microsoft and the DIR</li> </ul>
Timothy Cone	Practice Director, O365, Dynamics, Analytics	<ul style="list-style-type: none"> <li>Manages skilled Gulf Coast team and accountable for high-quality delivery and ensuring customer satisfaction</li> </ul>
Ashley Diekman	Project Manager	<ul style="list-style-type: none"> <li>Drives project progress</li> <li>Creates and maintains project schedule</li> <li>Develops implementation plan</li> </ul>
Richard Calderon	Director, Modern Workplace Strategy	<ul style="list-style-type: none"> <li>Lead Catapult's Modern Workplace Strategy services offerings focused on helping customer realize business value from Microsoft 365</li> </ul>
David Broussard	Principal Consultant & O365 Evangelist	<ul style="list-style-type: none"> <li>Oversight responsibility during implementation</li> <li>Point of contact once implementation is complete</li> </ul>
Greg Kastl	Microsoft - Customer Success Manager	<ul style="list-style-type: none"> <li>Helps Agencies realize value from their O365 investment</li> </ul>

## Quick Poll

- A few questions to better understand who's in the room today and what Office 365 applications and tools you know or already use
- Poll uses Microsoft Forms, included in Office 365



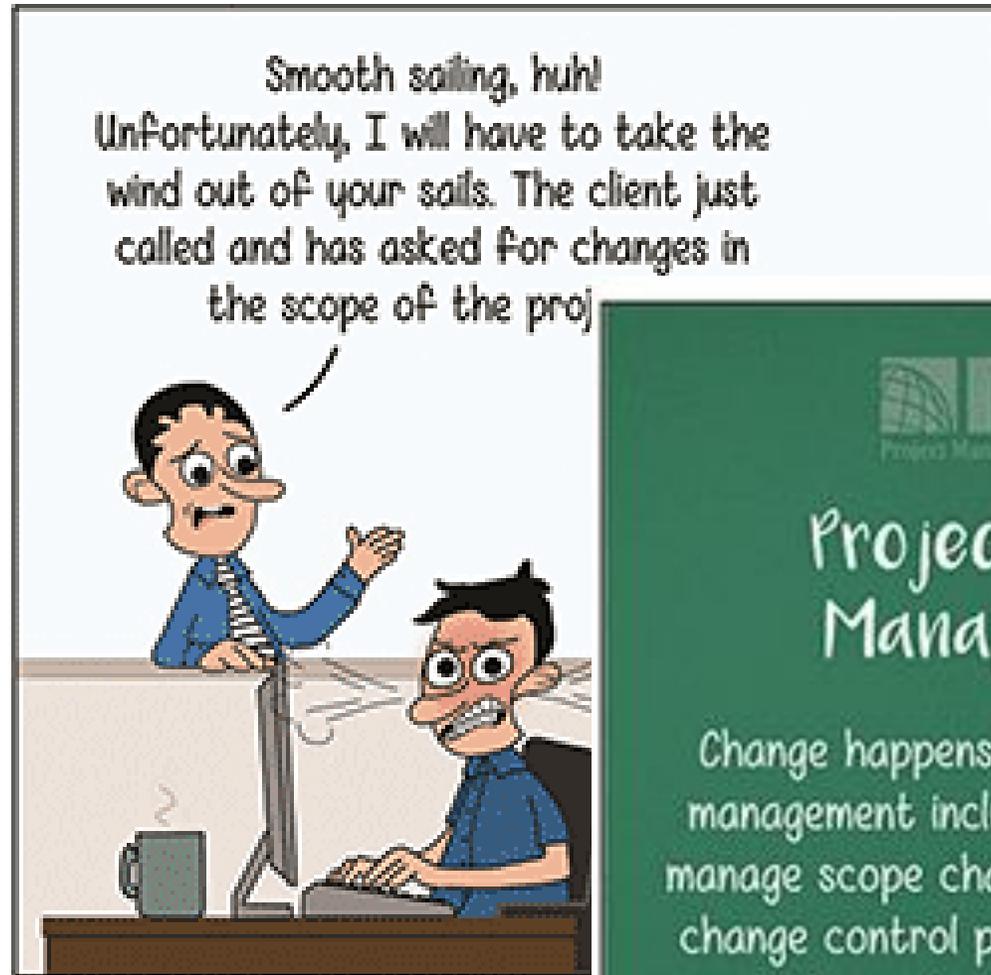
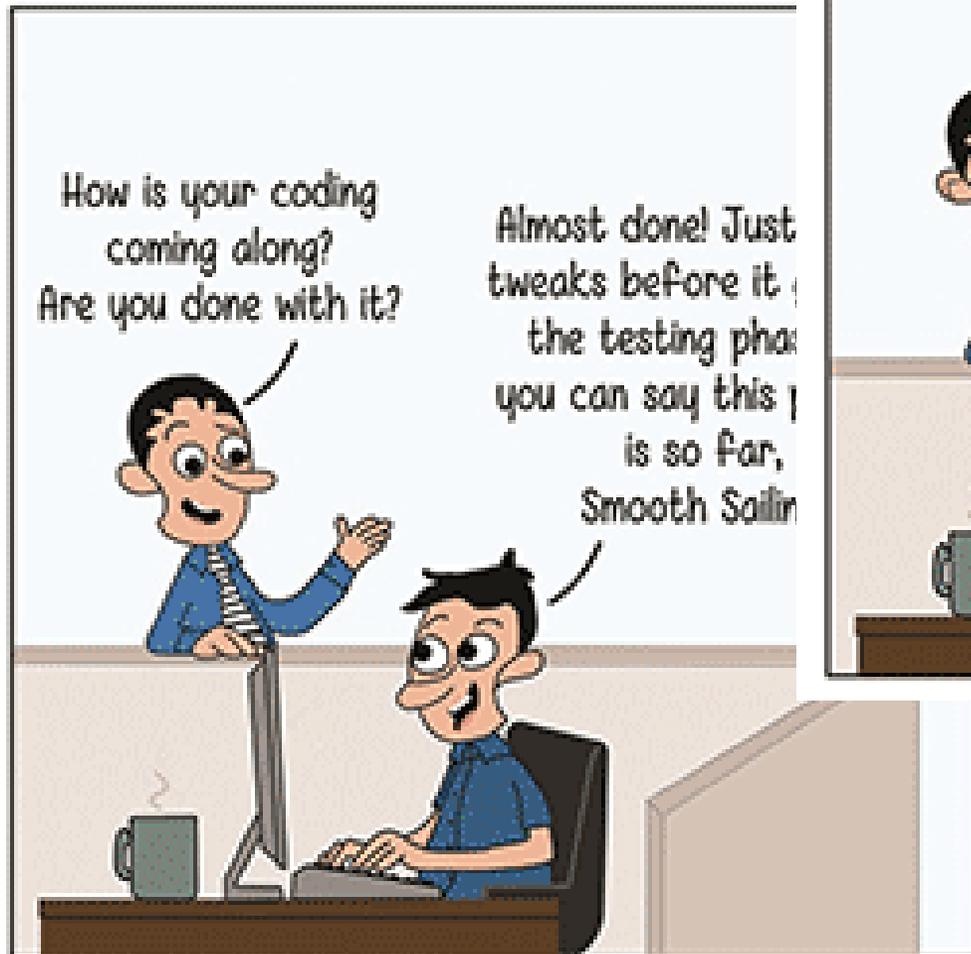


Project  
Management  
*at it's finest*

# Project Scope



# Project Scope



## Project Scope Management

Change happens, and project scope management includes the process to manage scope changes through formal change control procedures and make sure the project will still come in on time and within budget.

# Project Scope



- Align to a common goal
- Plan Plan Plan.....
- Management and task delegation

# Project Communication



# Project Communication



## Project Status Reports

*Sent via email on a weekly basis*

## Issue/Risks Log

*Spreadsheet SharePoint site access*

## Meeting Minutes

*Sent via email after meeting*

## Steering Committee Deck

*Sent via email as a PowerPoint deck*

## Daily Stand Up

*Tracked in a spreadsheet on SharePoint*

# Project Communication

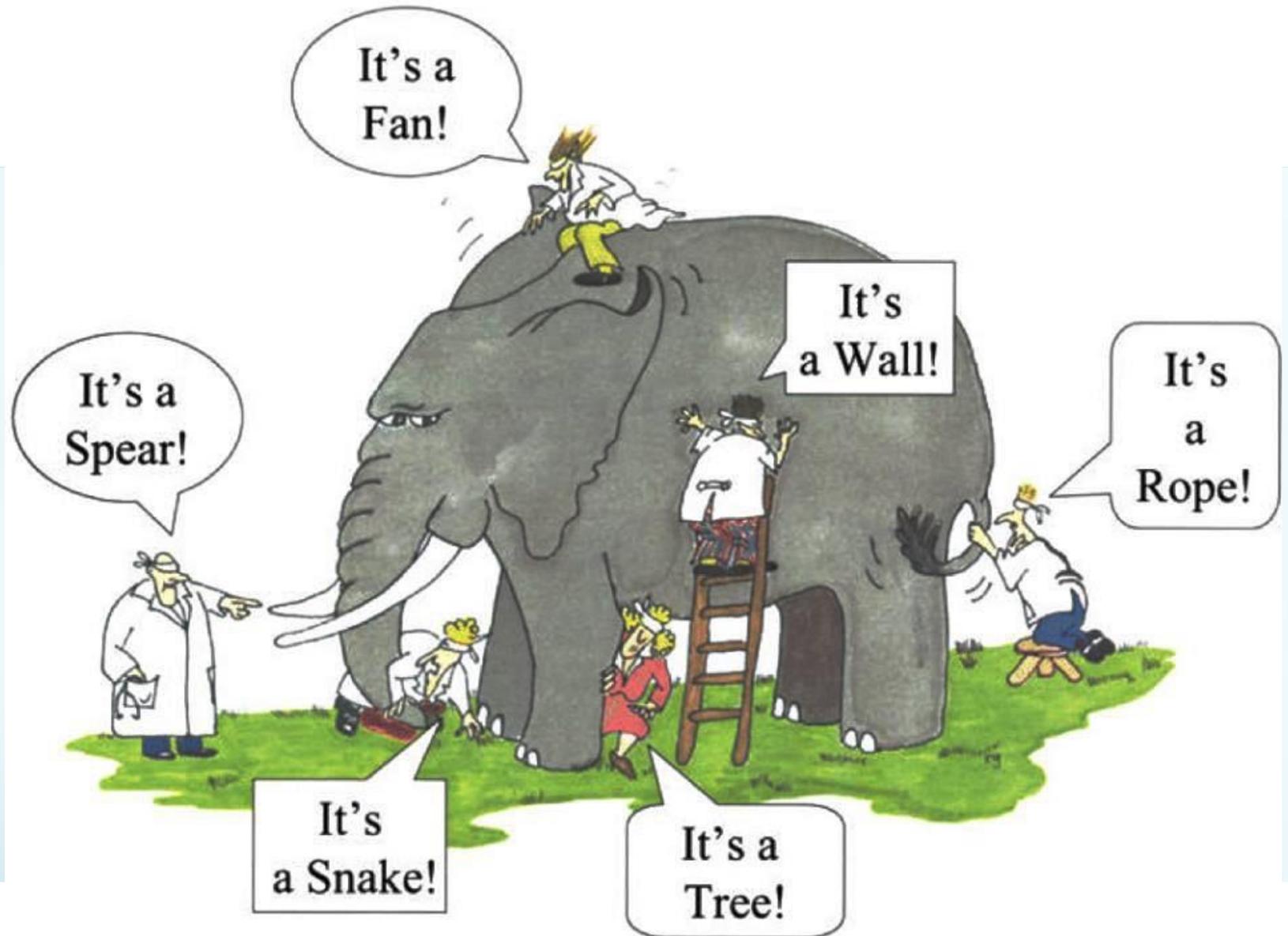


# Project Communication



- Constant communication
- Managing expectation
- Coordinating people

# Project Issues



# Project Issues



- Healthy Skeptic
- Constantly playing scenarios and planning accordingly
- Keen interest in the How and Why



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    <i class="fa fa-address-book" />
  </li>
  <li>
    <a href="#" />
    <i class="fa fa-sign-out" />
  </li>
</ul>
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# Project Scenarios



# Legislative Response

Collaboration between a Commissioner, a Program Manager, the Program Team, and a Reviewer is the key to responding to a request for information from the Legislature with solid research that aligns with the agency's guidelines and showcases the benefits of their program.

# Scenario #1

## Problem Statement and Hero Persona

### Problem Statement:

Agencies face complications and difficulties during the process of responding to requests for information from the Legislature. For illustration purposes, this story is based out of our Agency, but the scenarios here can be extended to any agency. Often, the process of responding to requests for information involve

- Identifying the response team
- Crafting the response
- Reviewing and Approving the response

David Broussard is a Program Manager with our Agency. David's commissioner has fielded a question from the Legislature that involves researching, financial analysis, data analysis, creating, and reviewing a response document. Throughout the lifespan of this response, David will communicate and collaborate with the team, hold meetings, and multiple review sessions aimed at completing the response document.



David Broussard  
Program Manager

"I love the that I get to interact with and help shape our agency's responses to the Legislature, which will have a positive outcome for thousands of my fellow citizens."

- Authors response documents
- Collaborates with experts

David is a Program Manager who has been working in the government sector for over ten years. In his role, David's primary responsibility is handling the coordination of the researching, creating, and reviewing of documents that come out of Requests for Information from fellow government employees and the Legislature.

# Team Personas



Tim Cone  
Commissioner

- Sends Request for Information
- Hand signs final document



David Broussard  
Program Manager

- Receives Request for Information
- Identifies Team
- Reviews documents



Michael Kennedy  
Financial Analyst

- Ensures document alignment with government's goals



Ashley Diekman  
Data Analyst

- Receives email notification of task
- Confirms the information in the documents
- Reviews and edits documents



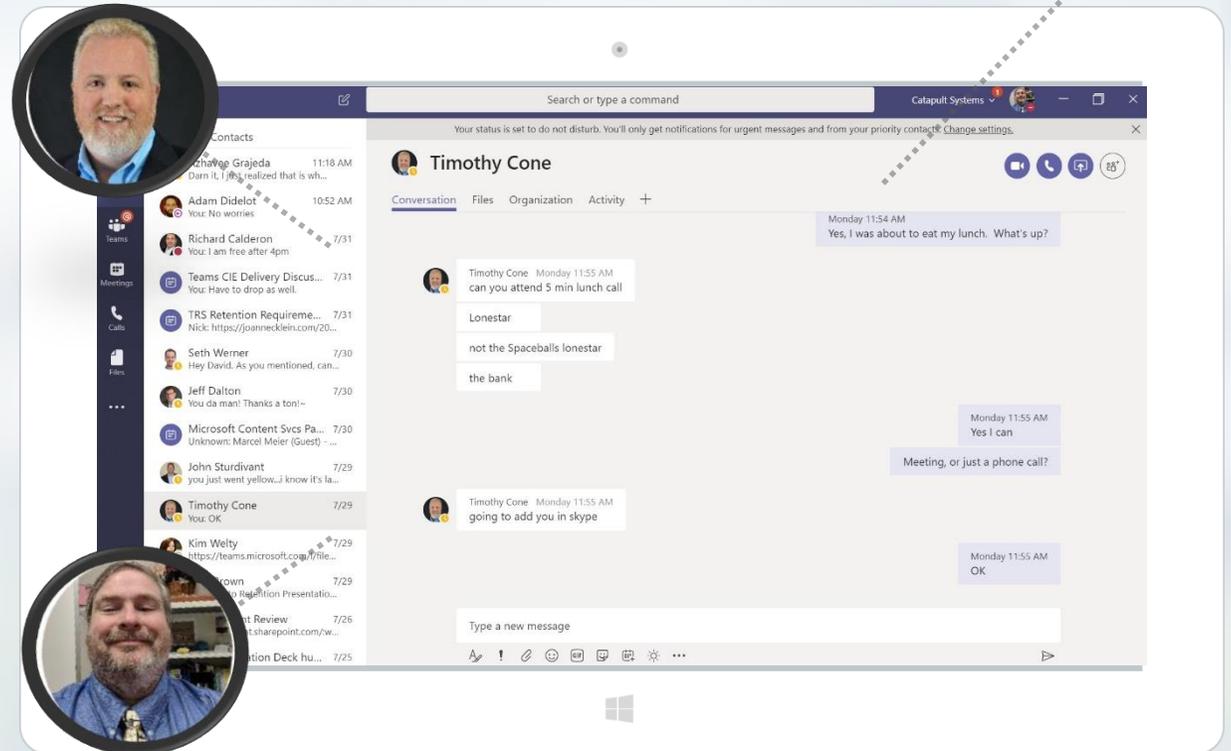
Richard Calderon  
Reviewer

- Gives documents a final review

# Receive Request for Information

Our story begins with Tim receiving a Request for Information.

- Tim Cone, David's commissioner, receives a request from the Legislature during a hearing. Tim sends David a chat message, asking if he has time to talk.
- David responds that he is free, and the two hold an audio conference. In the call, David reviews the Request for Information that was made by the Legislature with Tim.
- David decides that the Request for Information will require the creation of a response document. He documents the request in his OneNote, and creates the response document from a template in his OneDrive.

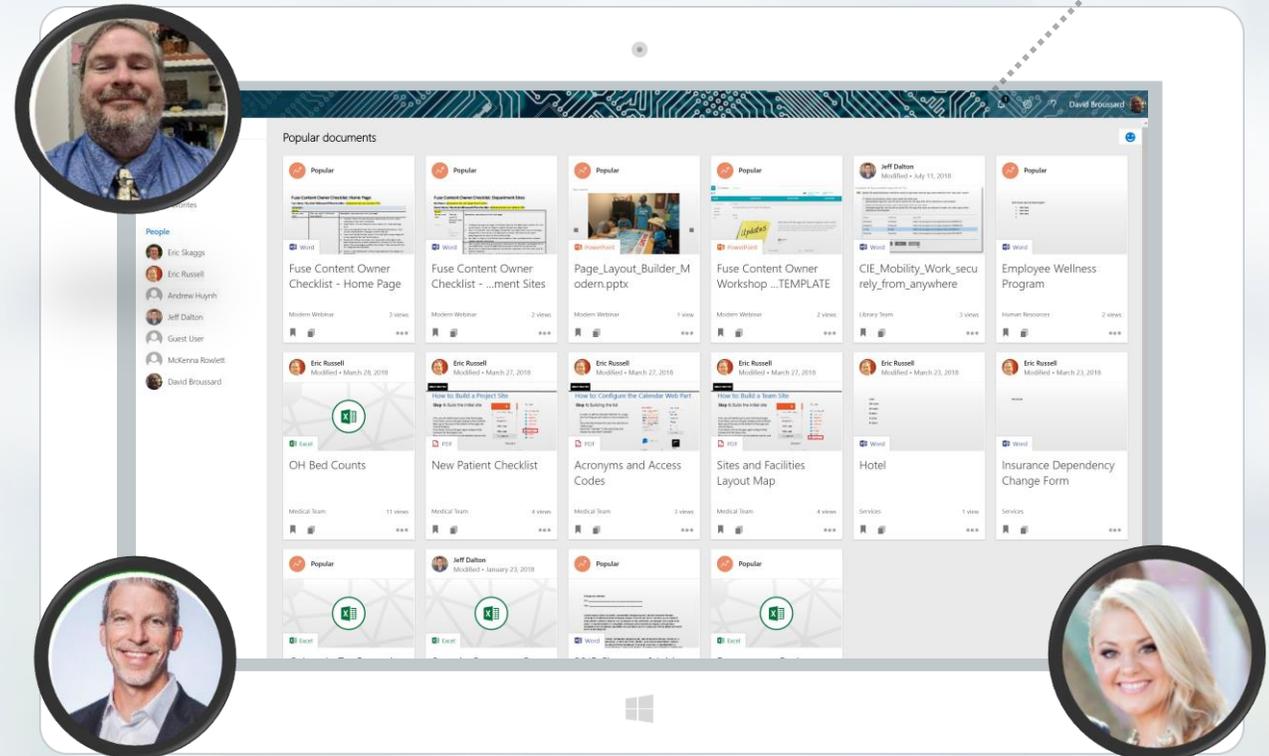


Demo

# Identify Response Team

Now, David needs to identify the Response Team

- David knows some people who can assist with the response, but he also wants to look for additional people. He can use Delve to find documents of prior responses to use as a starting point
- Next he needs to find co-workers that have experience with Financial Analysis and Data Analysis. He can use Who in Teams, or Delve to find individuals who have experience in those areas.



Delve

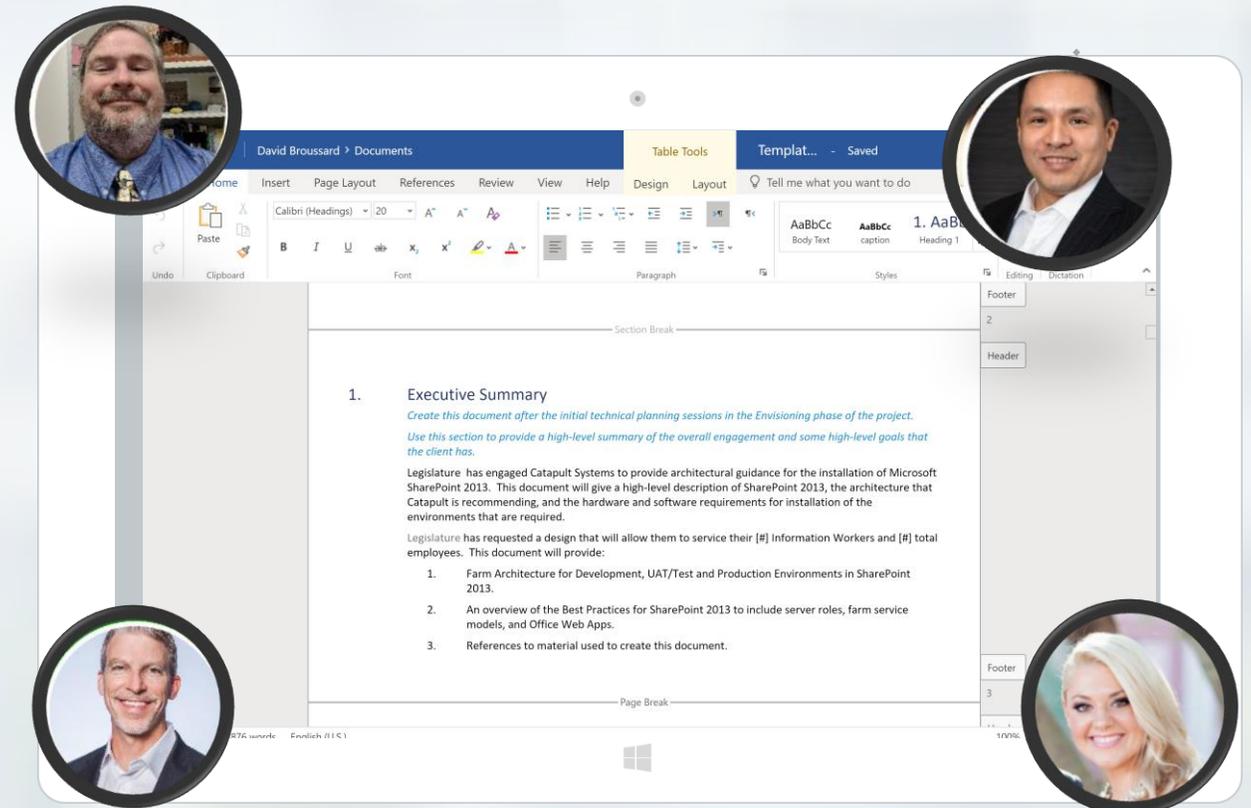


Who

# Create, Edit, Approve Response

Once David has identified the team (Michael and Ashley, he shares the response document with them, holds some ad hoc meetings to co-author with them and then brings in Richard to review the document before sending Tim a link to the document

- Share from OneDrive
- Co-author and hold ad hoc meetings
- Bring in Richard to review the document (@mention comments)



Word



OneDrive

# Summary



## Solution

With the efficiency of Office 365, David researched, created, and reviewed a response document based on Tim's Request for Information. Collaboration between the Program Manager, his commissioner, the Program Team, and the Reviewer was key to creating a response document with solid research that allowed Tim to respond to the request.



## Benefits

- ✓ Communicate and give presentations
- ✓ Document collaboration through files tab
- ✓ Utilize Word to co-author and reviewed documents
- ✓ Used Teams and OneDrive to communicate and share documents
- ✓ Record notes and more within OneNote



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Modern Desktop Award  
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# Behavioral Changes

We create content in a collaborative manner without being constrained by structure. When the content is deemed sufficiently mature it is converted into a structured document that can then follow a formal, if necessary, managed workflow to produce a shareable, authoritative output

## Stop

- Sending documents around as email attachments
- Storing content locally
- Publishing documents without reviews and without formal signoff where appropriate

## Start

- Defining a document creation process and workflow
- Storing documents in a single, centralized location
- Making content accessible to all relevant parties
- Managing document versions
- Managing tasks and the review process in a consistent way

## Continue

- Documents can be revised without “handing off”
- Revisions and reviews can occur in parallel

# Emergency/Disaster Planning

Creating a disaster preparedness plan to adequately prepare a region for any disaster involves multiple parties and requires an environment to organize, collaborate, and streamline an extremely complex effort.

# Scenario #2

## Problem Statement and Hero Persona

### Problem Statement:

Dealing with and planning for natural disasters and emergencies is an integral part of public safety. To do this, periodic exercises need to take place to train personnel on how to handle situations that can impact a large portion of the population. **Planning a disaster preparedness exercise involving multiple parties and complexities requires intense collaboration and organization.**

As a Government Official, Richard Calderon is taking charge by creating a disaster preparedness exercise to ready other government personnel in the event a disaster takes place in their city. **Richard needs to have clear lines of communication and collaboration to create the right injects and to properly measure the success of each.**



Richard Calderon  
Government Official

*"There's no excuse for not being prepared."*

- Coordinates creation of disaster preparedness plan
- Creates and assigns team member tasks
- Tracks preparedness within Power BI

Richard Calderon has been a public servant for the government for over 20 years and has a lot of experience in dealing with natural disasters. He has seen his fair share of earthquakes and floods that endanger many civilians. He knows the impact these disasters have on people's lives and wants to make sure the government is prepared to handle them.

# Team Personas



David Broussard  
Police Instructor

- Uploads previous emergency preparedness plans
- Brainstorms Injects and Measures



Ashley Diekman  
Chief Attorney

- Uploads previous emergency preparedness plans
- Identifies flaws in earthquake preparedness plans
- Brainstorms Injects and Measures



Michael Kennedy  
Fire Department Manager

- Uploads previous emergency preparedness plans
- Brainstorms Injects and Measures
- Plans Police and Fire Department inject



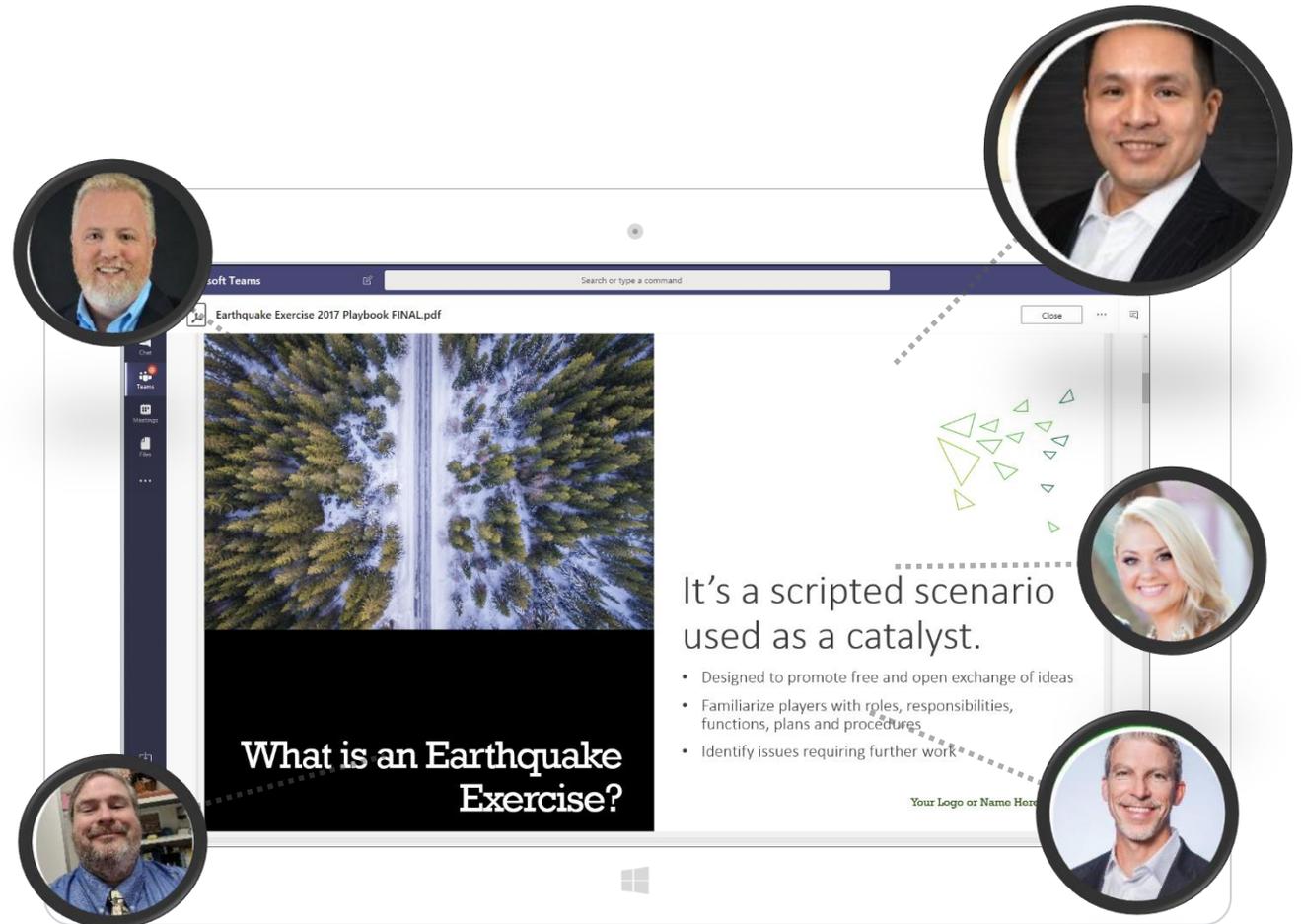
Timothy Cone  
Healthcare Representative

- Uploads previous emergency preparedness plans
- Reviews federal requirements for disaster preparedness
- Brainstorms Injects and Measures

# Ramping Up the Planning Committee

Richard Calderon wants to prepare his region for natural disasters that can and will happen where they live. To do this, he begins to put together a planning committee of government officials and emergency services to collaborate and plan in Microsoft Teams.

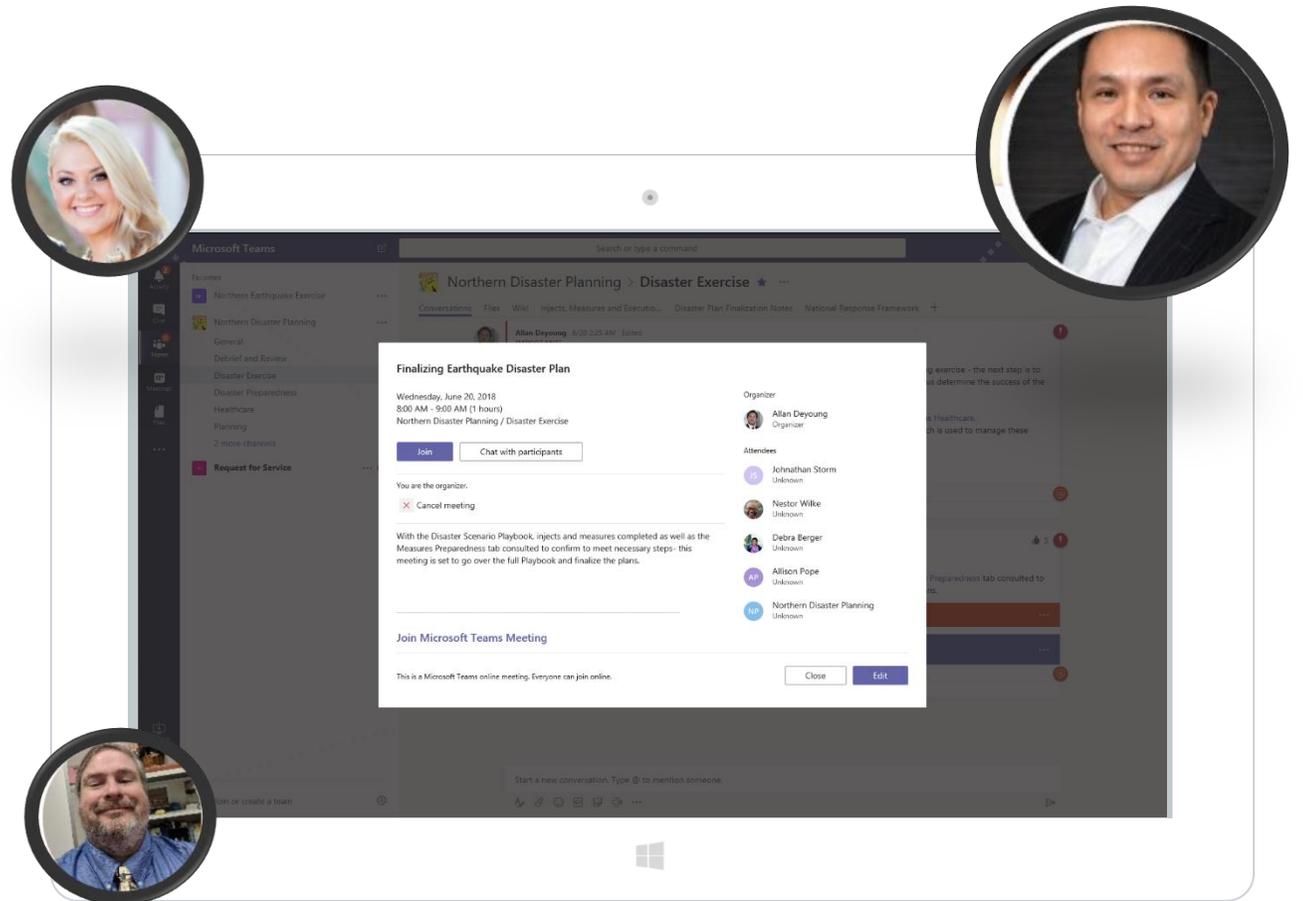
- Richard creates a team called **Central Texas Disaster Planning** so that the committee can have a powerful collaboration space to hammer out the details of the plan and what disaster they want to tackle first.
- He begins to add various government officials from the various civil services that will be essential in creating a realistic and accurate plan for a real-world scenario. Richard adds Timothy Cone, a Healthcare Representative, David Broussard, a Police Instructor, Ashely Diekman, the state's Chief Attorney, and Michael Kennedy, a Fire Department Manager.
- Richard then sends out a message in the conversation tab in the **Planning** channel asking all members to upload Word and Excel documents of past plans for emergency preparedness scenarios in the Past Emergency Preparedness Plans folder in the Files tab.



# Planning for an Earthquake

The planning committee uses a Teams meeting to discuss past plans, planning of the new earthquake disaster scenario, national response framework (i.e. National Guard response if needed), and requirements set by the federal government for disaster preparedness.

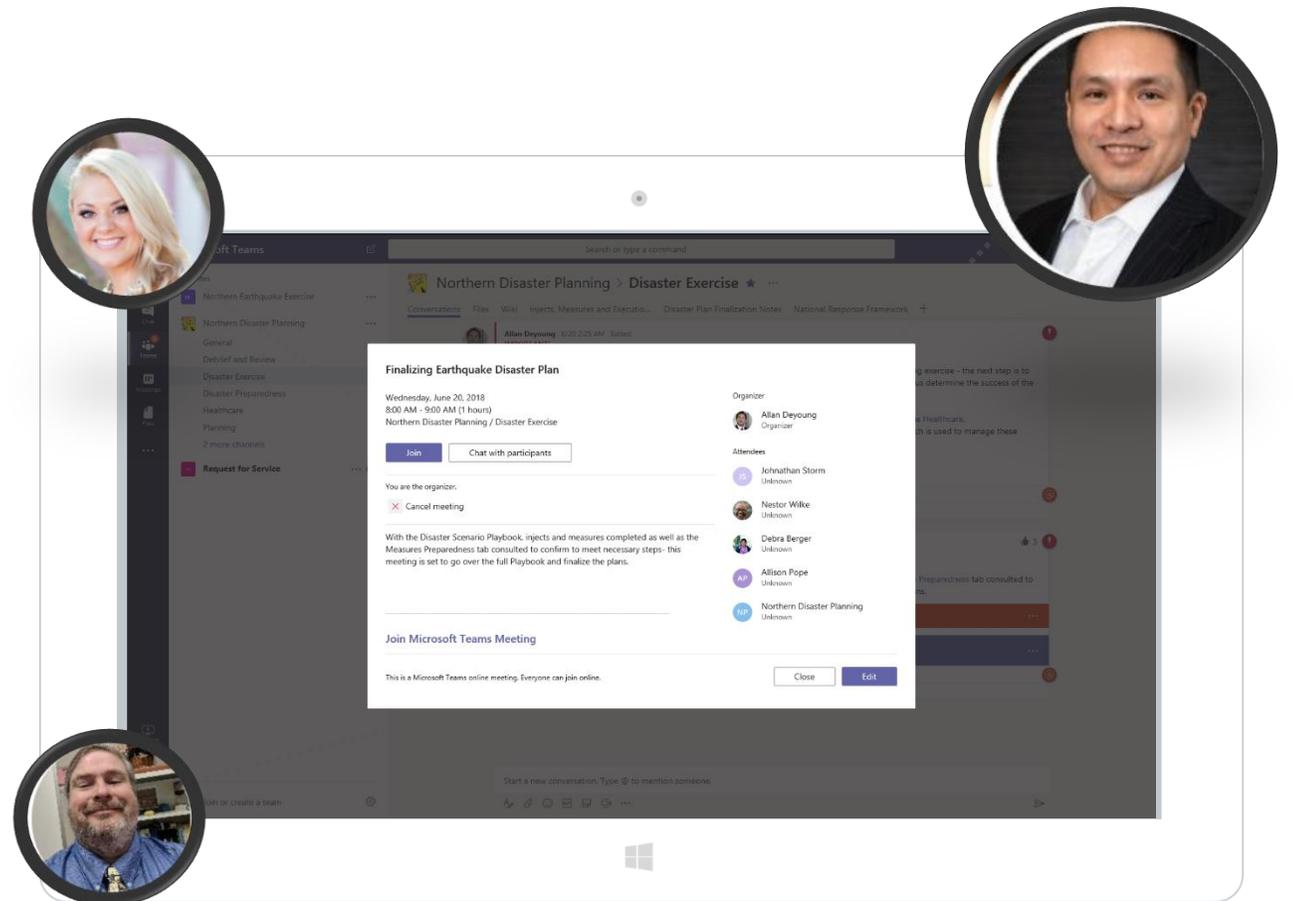
- In the meeting Richard shares a Microsoft Excel workbook of past plans results, showing what went well in each department and what didn't. David and Ashley comment on how during that exercise police were not able to get enough respondents to the disaster area in time to sufficiently meet federal regulations. Richard also shares recent news articles highlighting disaster response failures in various locations, hoping to improve their own so they can avoid these failures.
- After reviewing the past plan, they move to planning for their new scenario. Richard attaches a shared Microsoft PowerPoint that he uploads to the **Disaster Preparedness** channel for the committee to use for the creation of a Disaster Scenario Playbook. In the PowerPoint, he outlines all the main sections to make it easy for each member to fill out injects and measures. In the conversation pane of the **Earthquake Exercise 2019 Playbook** PowerPoint, Richard includes a sample of what an inject and measure should look like to give everyone an idea of the fidelity he is looking for.



# Planning for an Earthquake

- Richard also goes over National Response Framework that he has pinned as a PDF in a tab in the **Disaster Exercise** channel and in what scenarios it will be needed. Richard mentions in the meeting conversation that if the police and fire departments become overwhelmed, a national response for help will be needed.
- Ashley then segues into federal requirements for disaster response, specifically the fact that hospitals must be prepared to treat an additional 100 patients during emergencies.
- Once the planning meeting has ended, they come out with a preliminary Disaster Scenario Playbook informed by past plans, experienced emergency personnel, and national requirements. Richard pins this PowerPoint to a tab in the **Disaster Exercise** channel for quick and easy viewing by committee members.

With an overall plan for an earthquake in place, injects and measures for those injects need to be built in for each emergency service involved.



# Injects and Measures

Now that the team has an overall plan built, they need to build specific Injects (scenarios that go on throughout the day) and Measures (a metric of success for a specific disaster exercise) that will help them determine the success of the exercises.

- Richard creates a channel for each committee stakeholder where they receive the requirements for injects and measures. These injects and measures are identified in the Disaster Scenario Playbook, which is shared with everyone in the **Disaster Exercise** channel.
- In a **Planner** tab in the **Disaster Exercise** channel, Richard then assigns each stakeholder to evolve a plan around how they will successfully manage the injects to cause major challenges that emergency service personnel will need to solve. These details are to be completed and added to the shared Playbook PowerPoint.
- Richard has an idea for a Healthcare inject. He mentions Timothy in the **Healthcare** channel, and states that a hospital will need to be prepped for a surge of over 100 additional patients due to the derailing of a light rail during the earthquake.

The screenshot shows a Microsoft Teams meeting interface. The main content is a Power BI dashboard titled "Injects, Measures and Executions". The dashboard features two charts: a stacked bar chart for "Past Pass/Fail Measures" and a line chart for "Past Count of Injects". Below the charts is a table titled "Planning Status and Progress for Upcoming Exercise".

Planning Stage	Kickoff?	Plan Finalized?	Budget Determined	Budget Amount	Budget Approved?
Injects	Yes	Yes	Yes	0	No
Testing	Yes	No	Yes	40000	NO
Research	Yes	Yes	Yes	50000	NO
Staffing/Volunteers	Yes	No	Yes	65000	No



# Injects and Measures

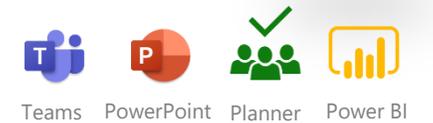
- In the conversation in the **Healthcare** channel they see the measure for this inject requires Police and Fire Departments to have at least 10 respondents each to successfully reach the measure of success. Richard mentions David and Michael to include them in the conversation and plan for this inject.
- Richard now navigates to the Power BI dashboard that his team has previously set up to measure preparedness. This dashboard measures whether the necessary measures are being met, as well as other metrics defined by each department such as collection channels, asks, and budgets. Richard notes that the team appears to be on track, according to the dashboard.

Richard sees Planner tasks slowly start to move to done and that the overall plan is coming together smoothly.

The screenshot shows a Microsoft Teams meeting interface. The main content is a Power BI dashboard titled "Injects, Measures and Executions". The dashboard has three main sections:

- Past Pass/Fail Measures:** A stacked bar chart showing the number of "Pass" (green) and "Fail" (black) measures from Jan 2015 to Jul 2017. The "Pass" count increases steadily over time.
- Past Count of Injects:** A line chart showing the number of injects over the same period, also showing a steady upward trend.
- Planning Status and Progress for Upcoming Exercise:** A table with columns for Planning Stage, Kickoff?, Plan Finalized?, Budget Determined, Budget Amount, and Budget Approved?.

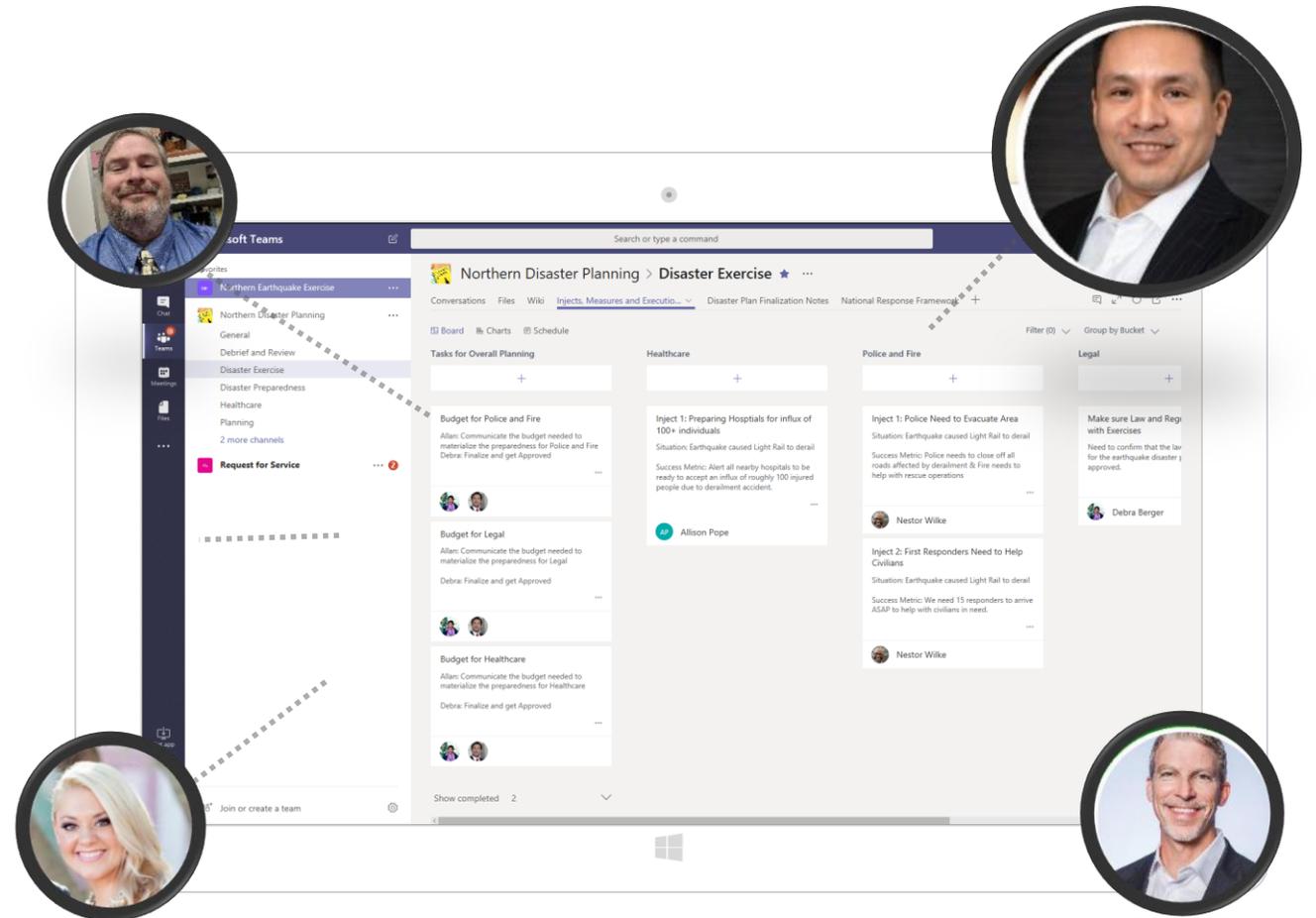
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Injects	Yes	Yes	Yes	0	No
Testing	Yes	No	Yes	40000	NO
Research	Yes	Yes	Yes	50000	No
Staffing/Volunteers	Yes	No	Yes	65000	No



# Recurring Checkups

With the Disaster Scenario Playbook and Injects and Measures completed, and the Power BI Dashboard consulted, Richard sets up a final meeting in the **Disaster Exercise** channel to go over the full Playbook and finalize the plans.

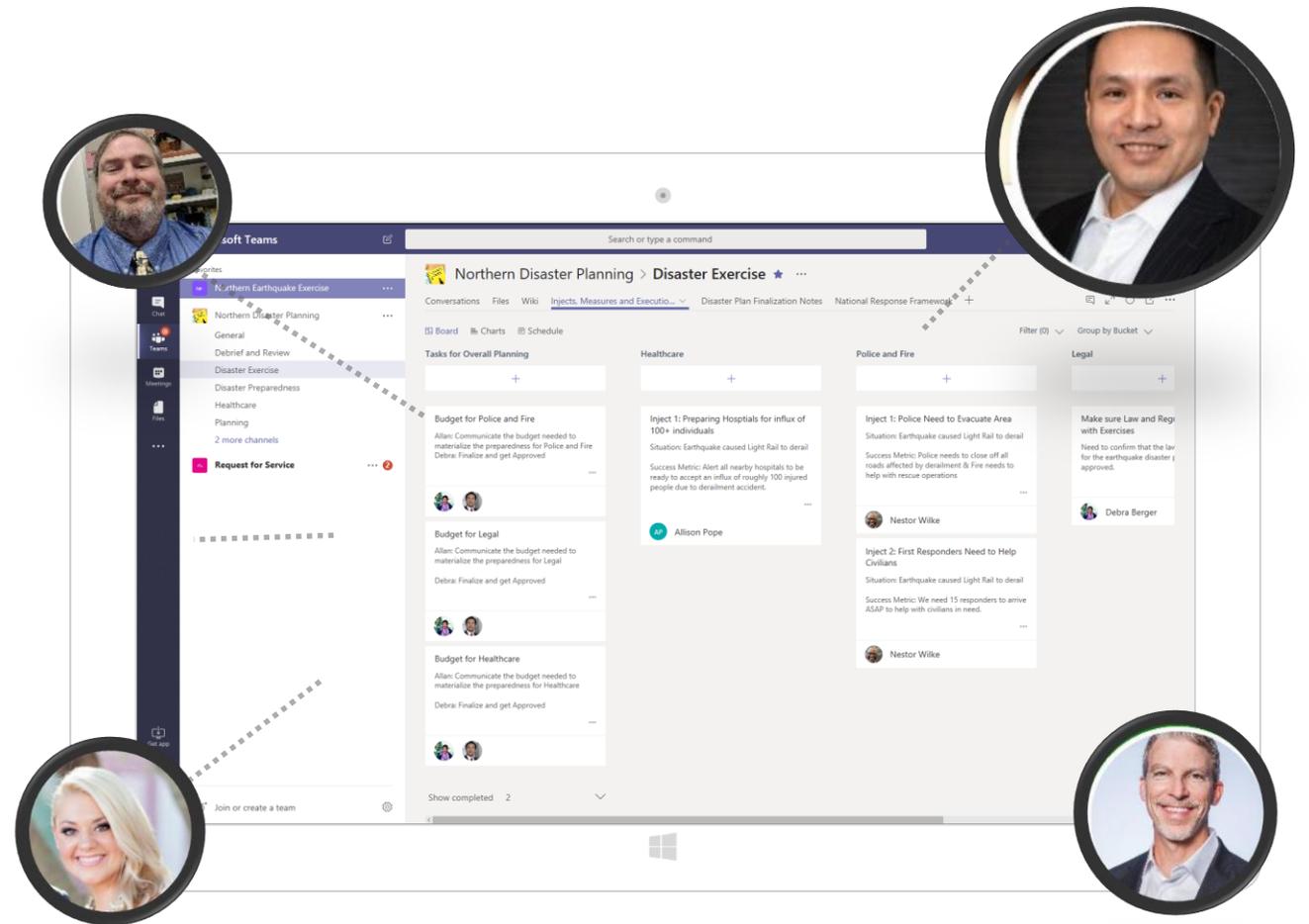
- In the meeting Richard shares the high-fidelity Playbook PowerPoint and they go through the entire plan making final revisions and approving each part of the plan along the way. Michael also provides commentary on the laws and regulations and the need for Richard to secure the budget needed for this level of preparedness and provides some edits.
- Richard also mentions guidelines for metric collection channels at the end of the playbook. Each department is to report in their own respective channel when they execute the exercise.
- After the meeting ends, Richard posts a recap in the conversations tab in the **Disaster Exercise** channel, stating the plans have been approved by the entire committee and the date the exercise will take place. He also adds an additional comment thanking the team for their hard work in preparing this exercise.



# Recurring Checkups

- He then assigns himself some tasks in Planner in the **Disaster Exercise** channel to communicate the budget needed to materialize this preparedness plan for all departments. He then passes it off as a Word Document proposal to Ashley for her to finalize and get approved.

The Committee was able to use Teams to break down an extremely complex disaster preparedness planning effort into stakeholder-specific environments that were easy to keep track of and control.



Demo

# Summary



## Solution

Microsoft Teams provided the environment necessary to organize, collaborate, and streamline an extremely complex planning effort to create a disaster preparedness plan that will adequately prepare a region for any disaster.



## Benefits

- ✓ Communicate and collaborate through established channels
- ✓ Host a wealth of information and files
- ✓ Organize meetings and schedules easily
- ✓ Create powerful and easy-to-digest plans in PowerPoint
- ✓ Create, track, and assign tasks in Planner
- ✓ Create detailed documents in Word



# Behavioral Changes

Through being able to easily leverage the data, information and knowledge that customer possesses, we can make better decisions on what to do and when to do it. We need to understand that incidental delays in decision making have impacts on productivity and staff engagement. We need to leverage off previous decisions to help us make better decisions in the future.

## Stop

- ✗ Requiring in-person meetings
- ✗ Tracking tasks and assignments in manual ways

## Start

- ✓ Using Virtual Meetings with video
- ✓ Use a centralized and shared online tool for tracking tasks
- ✓ Recording meetings for on-demand viewing and knowledge capture and transfer in a streamlined way

## Continue

- Leveraging the expertise of your co-workers while enabling them with a new set of efficient tools

# IT Project and Portfolio Management

Collaboration is how work gets done

-  **Internal & External Team Members** Team members outside the firewall need unfettered access
-  **Geographically Distributed** Need varied ways to connect across locations and time-zones
-  **Multi-Generation Workforce** Different expectations and preferences for tools

# Different groups have different needs

Mail & Calendar



Sites & Content Management



Voice, Video & Meetings



Co-Authoring Content



Enterprise Social



Chat-based Workspace



## Siloed Apps

Friction across applications – multiple logins, difficulty sharing and discovering information

## Wasted Time

Context switching between different apps drains attention and time

## Shadow IT

Incomplete toolset can lead to inconsistent security, compliance and risk

# Office 365

Designed for the unique workstyle of every group



## Complete Collaboration Solution

Office 365 addresses the breadth of collaboration needs across your company

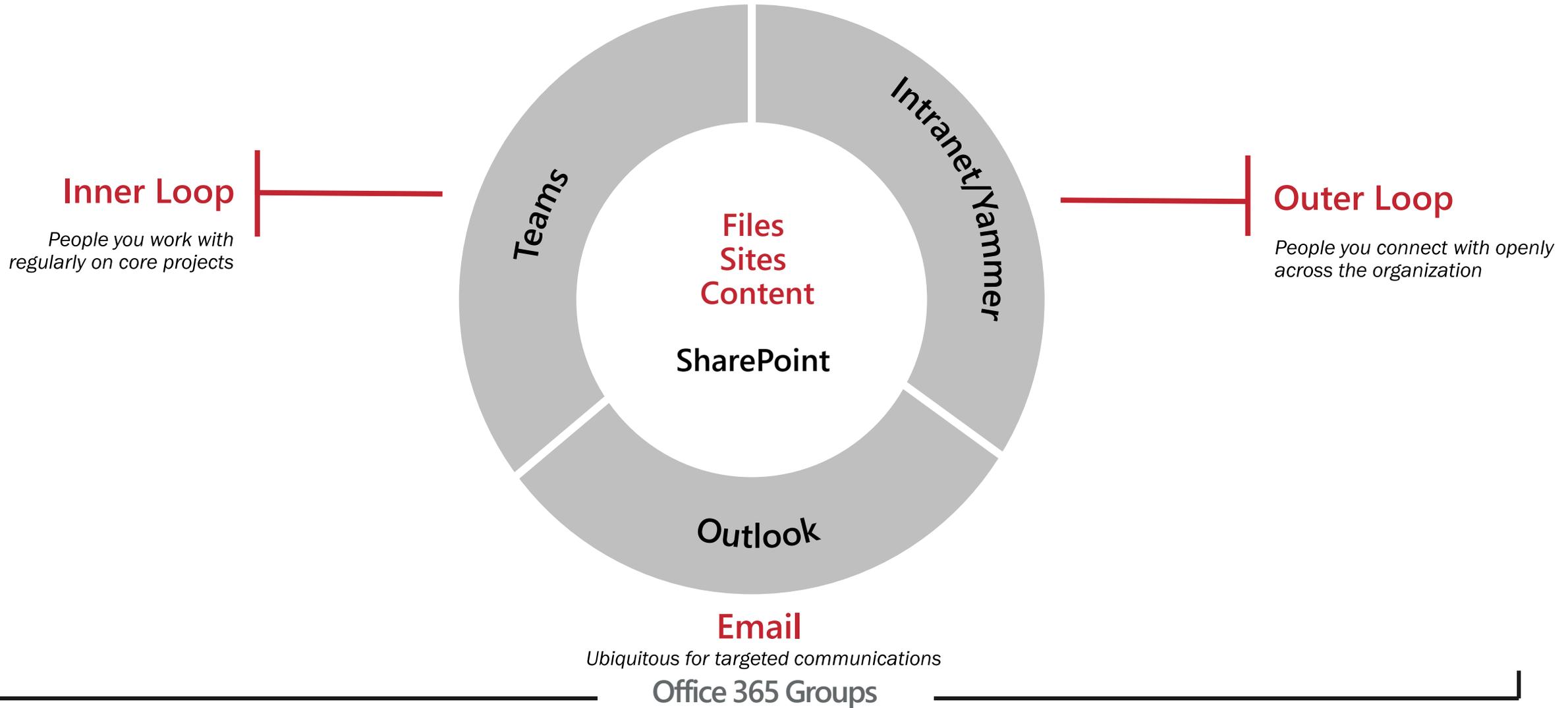
## Integrated Experiences

Office 365 Groups and Graph enable integrated experiences that facilitate effective collaboration

## Security and Compliance

Office 365 delivers the security, compliance and manageability required in today's workplace

# Types of Communications



# Inner Loop Communications

- Projects
  - Formal Projects with a defined scope, often managed by the PMO
  - Informal Projects that are run on an ad hoc basis
- Cross Departmental Teams
  - Budget team that has members from across the company working on a common task
- Departments
  - Common department tasks and communications like IT tickets, or Contract Negotiations

# Outer Loop Communications

- Finding an Expert
  - Creating a report and you need to find an expert on a topic somewhere in the organization
- Sharing Information
  - Publish departmental news to the entire organization
- Sharing Knowledge
  - Creating a knowledge base with curated information that anyone in the organization can access and

Demo

# What does this mean for you

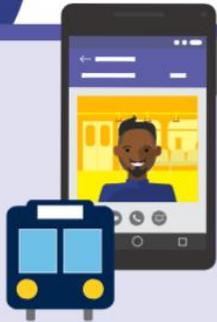
## Microsoft Teams

### 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.

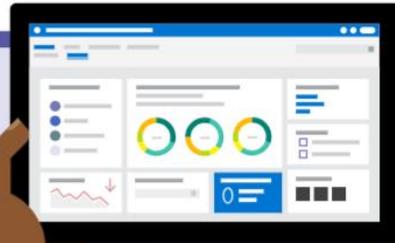
7:45 AM

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.



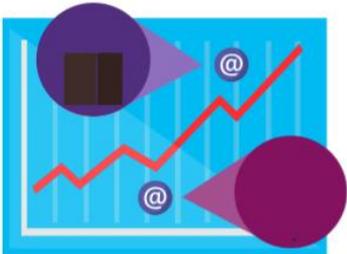
8:30 AM

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.



9:30 AM

On Teams he asks for additional data points related to projects risks and @ mentions specific individuals to get their attention.



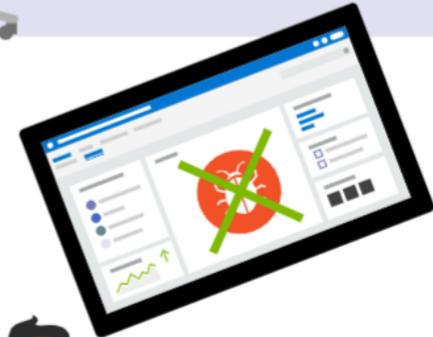
11:30 AM

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.



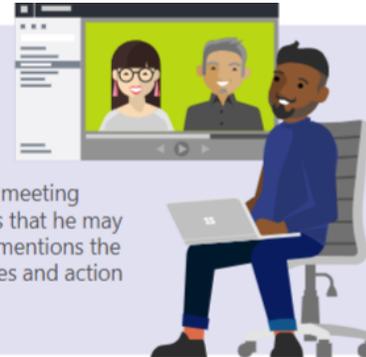
6:00 PM

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.



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.

The image features a dark, semi-transparent overlay on a background photograph of people working at a computer. The text 'Office 365' is centered in a large, white, sans-serif font. Below it, the text 'The Productivity Toolbox' is centered in a smaller, white, sans-serif font. Two red L-shaped corner brackets are positioned on either side of the 'Office 365' text, one on the left and one on the right, pointing towards the text.

# Office 365

The Productivity Toolbox

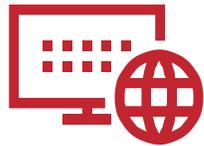
# The Office 365 Toolbox

Outlook



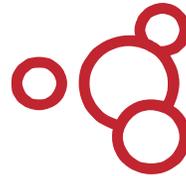
Email & Calendar

SharePoint



Intranets &  
Content Management

Yammer



Connect Across  
the Organization

Office Apps



Co-Author

Teams



Hub for Teamwork

## Office 365 Groups

Single team membership  
across apps and services

## Microsoft Graph

Suite-wide intelligence  
connecting people and content

## Security and Compliance

Centralized policy management

# Microsoft Teams, a chat-centered workspace

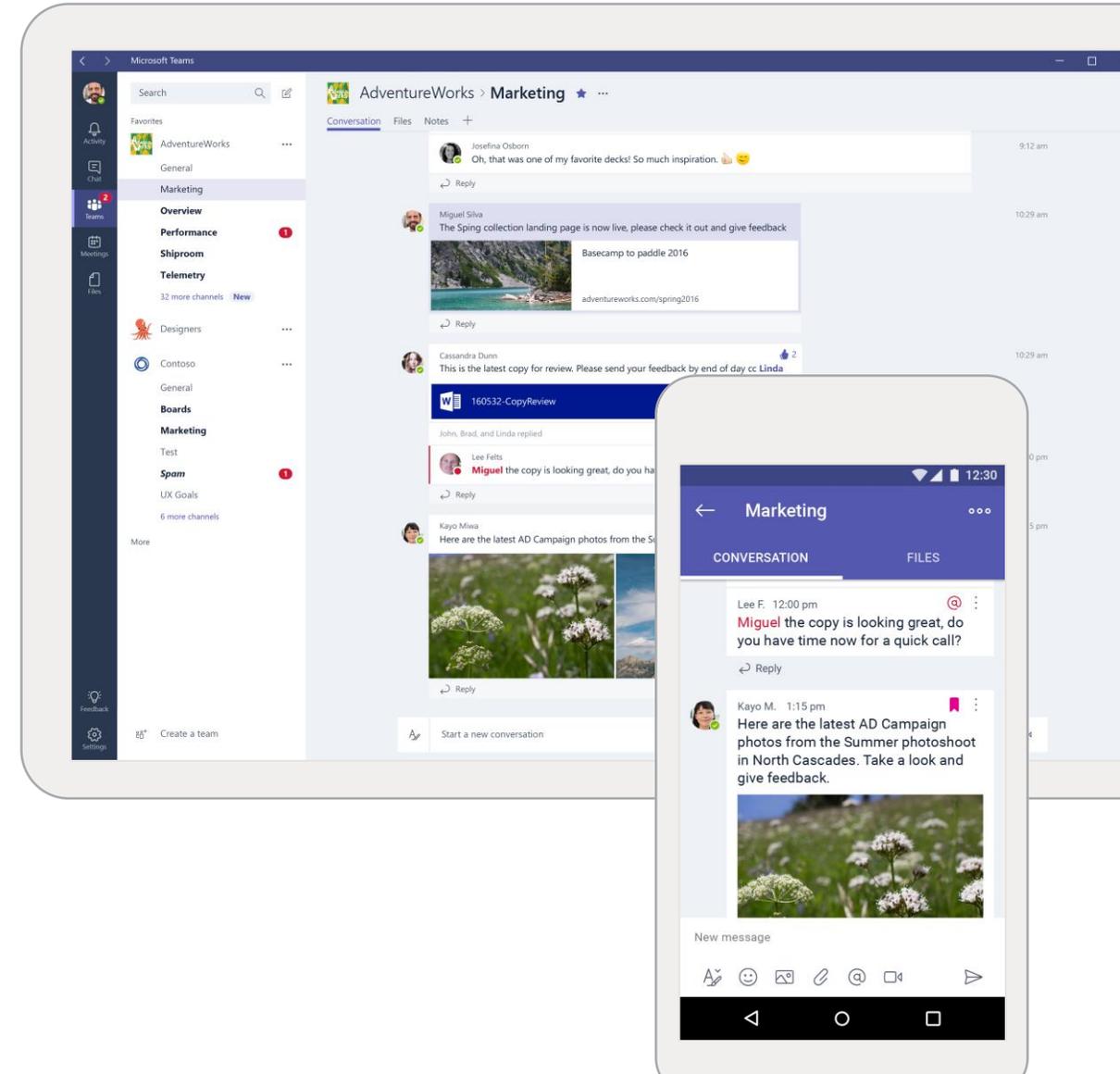


Chat for today's teams to **keep everyone in the know**

A hub for teamwork **integrated with Office 365**

**Security teams trust with** enterprise-level protection

**Customizable for each team** with content and capabilities



# Smarter email and calendaring with Outlook



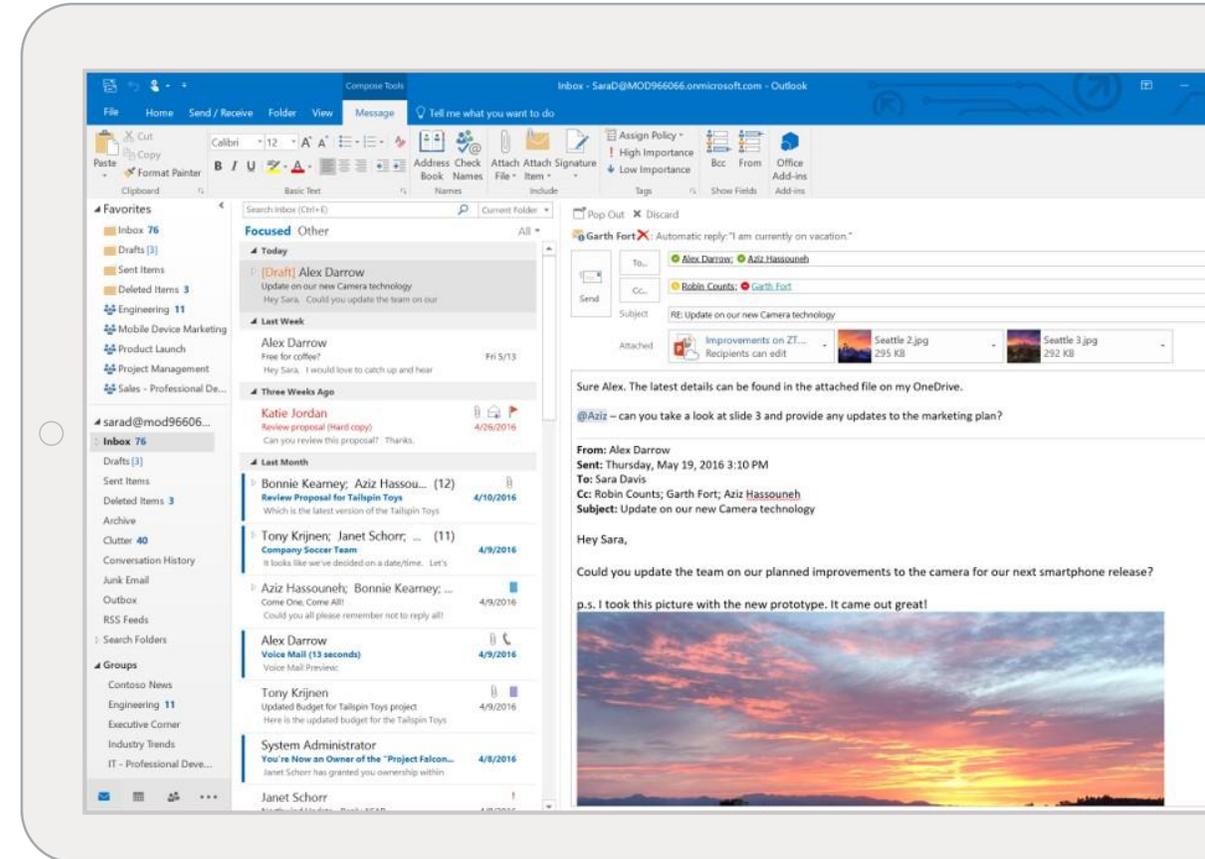
Stay on top of what matters with a **focused inbox**

**Share** OneDrive files easily as **cloud attachments**

Call attention to critical actions & input with **@mentions**

Go **beyond distribution lists** with a group inbox & calendar

Easy onboarding for new members with **full group history**



# Create, share, find content with Office & OneDrive



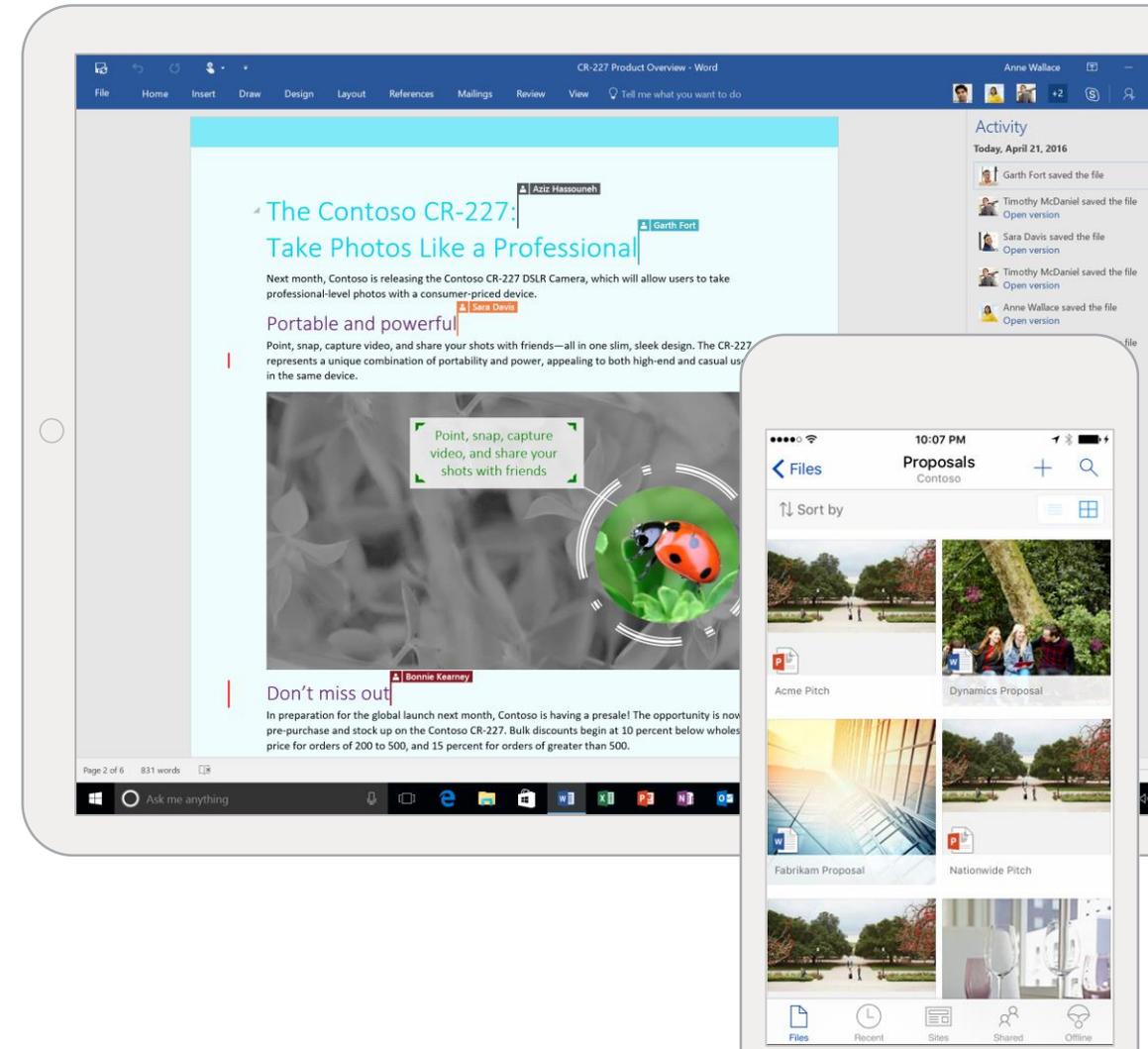
Co-author together in real time in Office applications

Store, sync & share files inside or outside your org

Find, follow & discover content from anywhere on any device

Manage document revisions with integrated feed & version history

Receive comments & changes while on the go with notifications



# Modern content, sharing & discovery with SharePoint



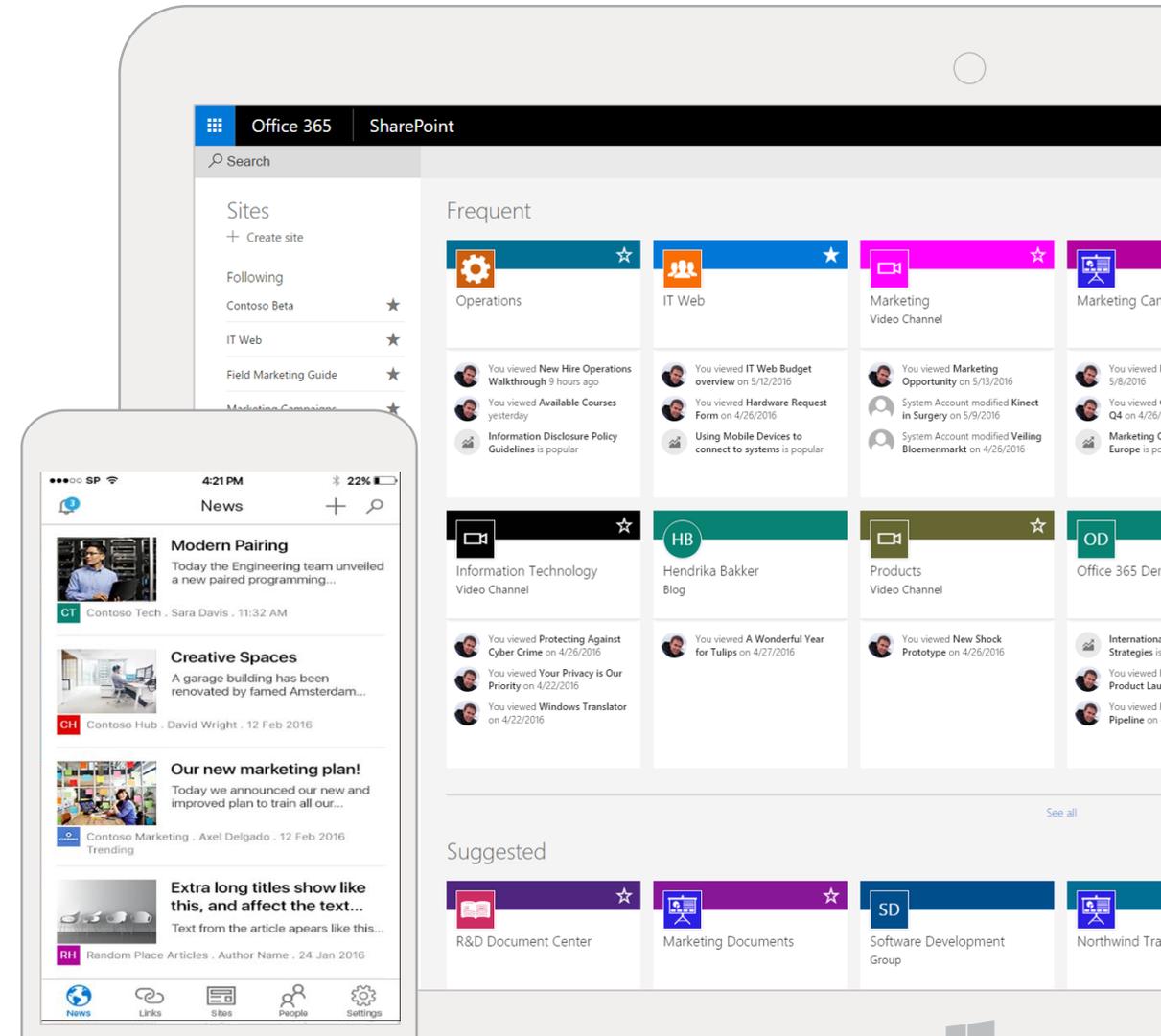
Access sites & content anywhere with **your Intranet in your pocket**

**Manage & collaborate on content** with your team

Navigate your intranet with **intelligent recommendations**

Create **beautiful team sites & publishing sites** quickly

**Automate business processes** with Microsoft Flow & PowerApps



# Connect with Yammer, the social network for work



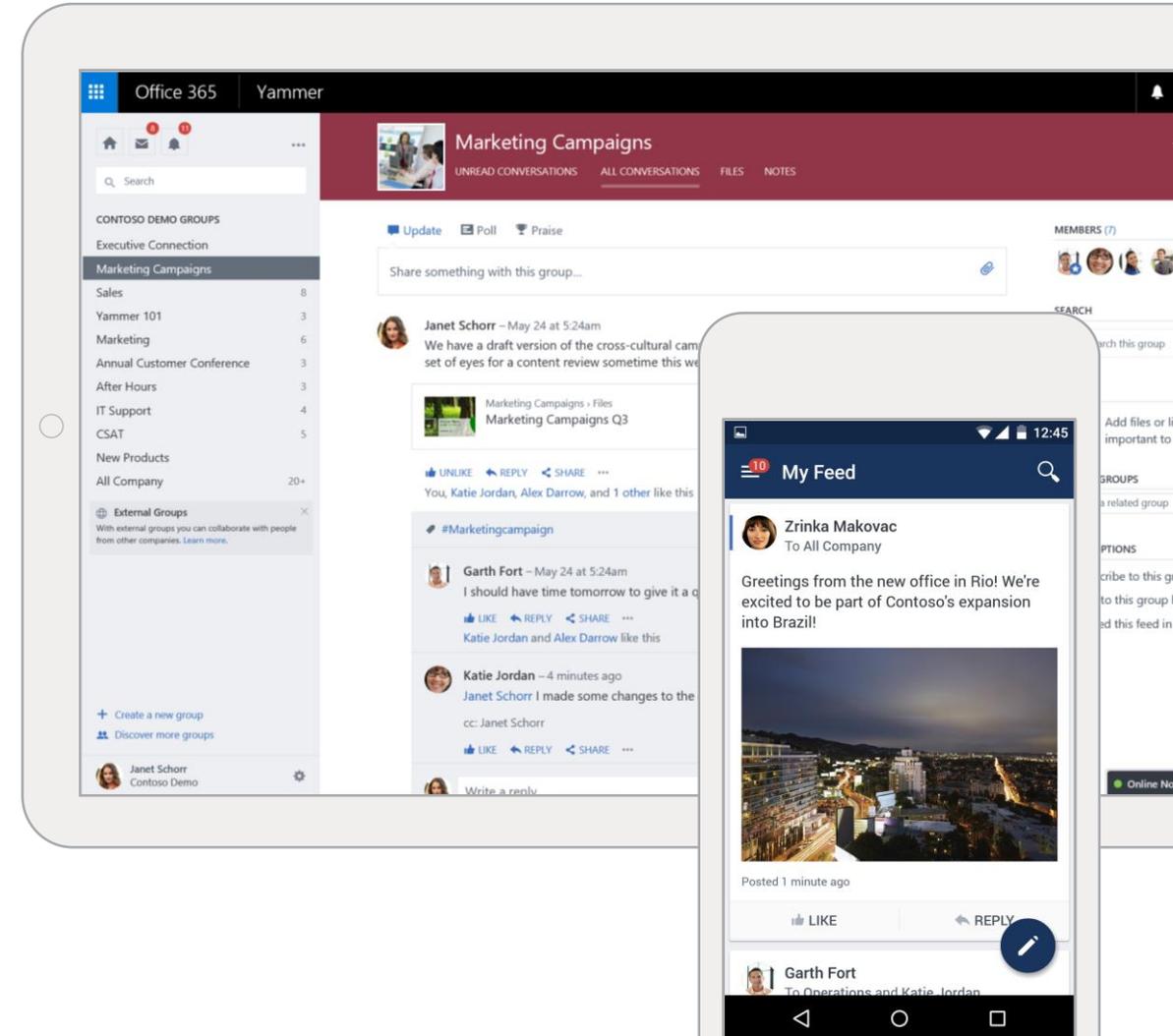
Foster **open team discussions** with the group feed

Tap into **collective knowledge** with search & discovery

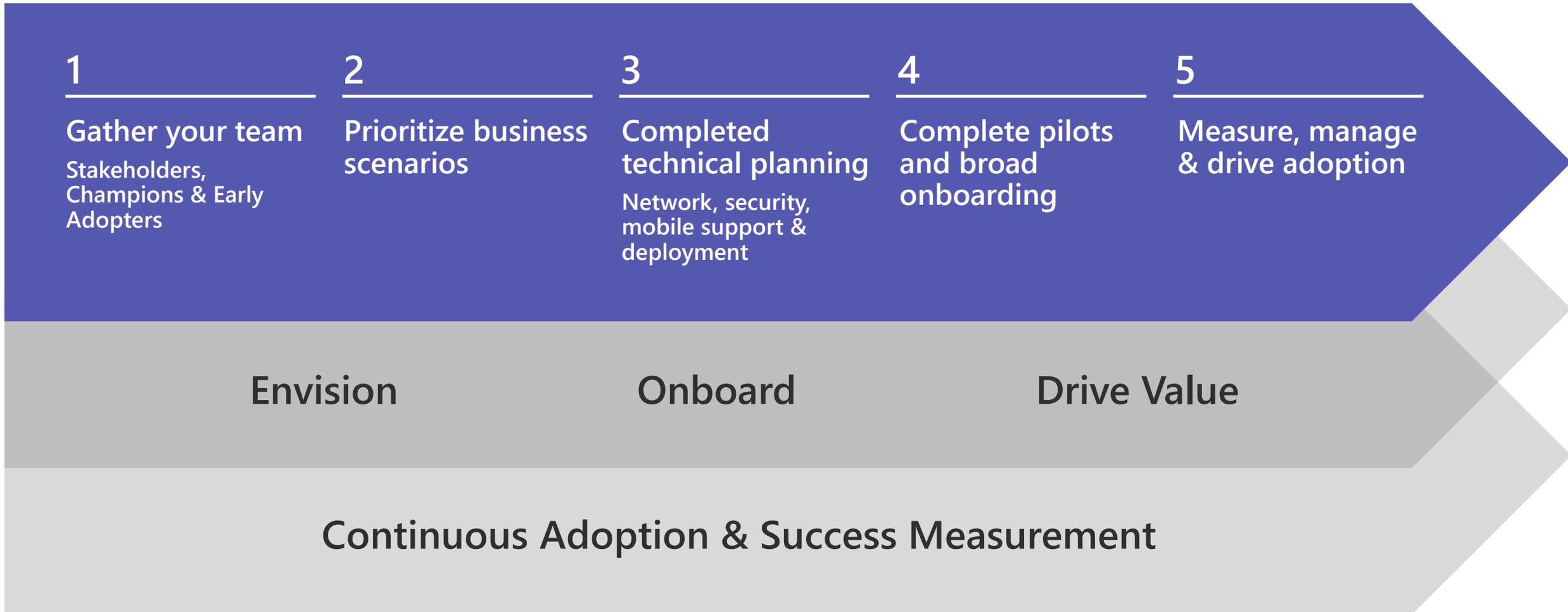
**Crowdsource ideas** & **share best practices** across the org

Get the **pulse of your company** using polls, praise & follows

Drive **employee engagement** with actionable updates & alerts

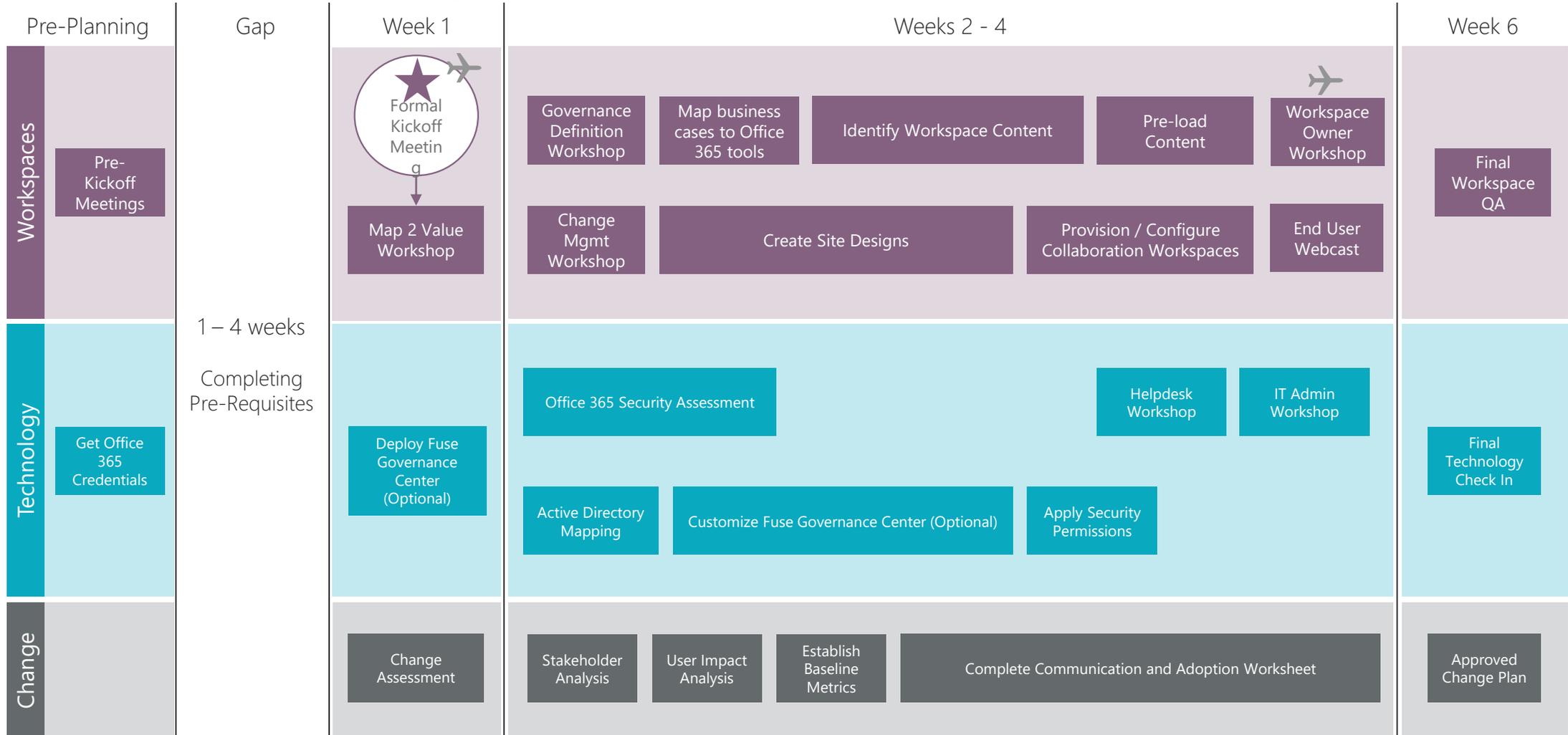


# Implementation phases for Office 365



# Teamwork Onboarding

Collaboration workspaces for your employees



# Finishing Comments

- What can you do when you get back to your office to help influence your agency to provide these tools to you?
  - Write up business scenarios which are specific to your role and would be enabled by the Modern Workplace
  - Reach out to your IT Leadership and tell them about the event and that Microsoft and Catapult are available to discuss ways they can help your agency
  - Take a copy of the Teamwork Assessment document and share it with your leadership