Microsoft 365 Adoption — Best Practices 2021

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What	Why	How
1 **Educate ALL users ASAP**	If you do not do this, only a subset of users will know about M365. Naturally, the ROI will also be a subset of your investments. Educating everyone will speed up adoption and maximize ROI. Once aware, users will be able to envisage where they can use these tools to their advantage.	Conduct as many Teams live events as needed to cover all users globally. Cover a brief introduction to all components of M365 platform. More importantly, those users who are unaware of the benefits will actively resist change – hampering adoption even further.
2 **Get the Top Management (TM) Involved**	They are the biggest beneficiaries Only TM can change the behavior of their teams (IT / L&D cannot) Active support from TM is essential to create and disseminate SOPs across the organization	Educate them. Quantify the benefits. Demonstrate to them that this platform is not just an operational tool – it is a competitive advantage and a growth driver – without writing a single line of code. No other software has the potential to improve the efficiency and effectiveness of every staff member in the organization.
3 **Include base Office in the skill transfer**	Everyone uses Office for creating files and all other M365 apps are for collaboration. You cannot do efficient collaboration unless you create things effectively.	Find common inefficiencies. Replace them with SOPs using efficient and business-mapped feature usage. Disseminate SOPs using TMs
4 **Use OneDrive effectively**	Using OneDrive effectively and securely is the first step towards digital transformation. Sending attachments is inefficient + less secure. Unless legally required, share links. You can not share files as links unless they are on OneDrive.	Make all users understand that after saving the file to OneDrive, a local copy is always available and editable offline. Highlight benefits over saving to local drive. Create an SOP – "Unless legally required, all files should be shared as links" Enable external sharing. It is safer and efficient. *Fix your DLP to support OneDrive.*
5 **End email overuse and misuse with Teams**	Email is the most important root cause of inefficient collaboration. Use email only for isolated, slow communication. Everything else should happen on Teams. Short term collaboration using Chat. Longer term collaboration using teams in Teams.	Instruct users when to use OneDrive and when to use Teams. Create teams in Teams for recurring meetings, reviews, shared mailboxes, and departmental file shares. Use Lists to replace Excel based data capture.
6 **Position modern technology by adding value**	Jargon and complexity repel users. Compelling "what is in it for me" attracts users. To stimulate user-driven adoption of modern technology, you must show significant improvement in existing processes or a new and useful capability.	Highlight inconveniences / inefficiencies in existing process. Show the same process using the new platform / app. Quantify benefits. Ask users if this is better. Once they agree and appreciate, it will spread. Show them how to get / deploy it in their work. Soon, users will imagine new use cases. *Do not use any technical words / jargon during this entire journey.*