Dynamics Matters
Podcast

Tips and tricks for getting the most from your Microsoft 365 investment

With Sergio Giusti - HSO Modern Workplace Practice Lead

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"Your only limitation is imagination" – Mike Stanbridge

Used correctly, applications such as Teams can save everyone 140 minutes a week. And Teams is just one of the tools you can find within Microsoft 365. The challenge is, not everyone is aware of the other tools available as part of their license. And if they are, not everyone is able to manage these tools in such a way they provide value.

Historically, organisations would buy Office 365 – which became Microsoft 365 – to move Microsoft Exchange from on-premise into the cloud. Having email in the cloud fixed many issues such as mail box sizes, security, etc ... Yet, buying your license also got you SharePoint. And you'll be using SharePoint, even if you don't know you are. For example, if you're using Outlook or Teams then you are automatically using SharePoint because SharePoint sits in the background as the file storage area. As it does for most things. OneDrive is a good example of SharePoint reskinned.

The point here is that once you understand this, you can then apply the same logic that you do to SharePoint permission management, how you structure it, what you can do in terms of sharing, security, governance and so on.

To bring clarity, and value, you will need to follow three steps. By doing so, you will be better positioned to get the most value from these tools, and your investment. So, without further delay, here's step one.

Learn what you've bought as part of your license package

You might have bought the Microsoft 365 license for a particular feature. Perhaps you wanted Outlook and Teams because you needed remote working enabled for your users. Little did you realise that by buying the license you've also gained access to a whole suite of other tools and applications.

Step one is about finding out what those applications are either through self-learning, or by bringing in a professional to go through each application to help you understand what the tools are and what they can do.

It's equally important to know what each application can do in conjunction with each other. When working in combination, the value of each application increases. For example, Tasks Planner works particularly well with Outlook and Teams.

Review what applications your team is using

You now know what you have access to, but you also need to know what applications are already in use. This will help you make decisions on what additional tools you could use from the set you now know you have to enhance, resolve, add-to etc ... existing processes.

Unfortunately, figuring what applications are in use is no easy task – yet, according to HSOs Head of Microsoft Modern Workplace, Sergio Giusti, it's the most important step. "Different software applications might be owned by different departments, they're unlikely to be all owned and managed by IT. So you need to work out who owns them, what do they do, and why they are doing it."

This is an interesting point. It means your existing applications are unlikely to be centrally controlled, and there will be multiple stakeholders to involve in this discovery phase.
Sergio believes this phase is likely to raise some uncomfortable questions. "This is where you will get to the heart of why things are being done one way, with the realisation it should already be done another. This can lead to a delay in the process because you might need to resolve issues that you now realise you've got before you can continue forward."

One of the things you will learn from this part of the process is you may be paying for licenses you don't need, or proposing budget for an off-the-shelf application to solve a challenge - a car park booking system for example - when you have the tools to create the application in your Microsoft 365 license. All you need is to learn what tools you have and how to use them. At which point you can move to the third and final part of getting the most from your Microsoft 365 license, planning.

Plan how to implement these new applications

The worst thing you can do is jump straight in. If you just jump into SharePoint to do document management, you may miss a trick when it comes to the integration between SharePoint and Teams. Again, if you're doing SharePoint for an intranet, you might miss a trick between the integration of SharePoint, Microsoft Viva, and Teams. If you're doing document management with SharePoint or OneDrive, or you're doing external sharing through SharePoint, OneDrive or Teams, you might not be aware of the governance features within Office 365 that allow you to block sensitive information from leaving your business or managing your document retention or security.

The key is to decide the priorities that will deliver the biggest impact and benefit. Think of something that has many touch points i.e. a system hitting everyone in the company as opposed to the one touching just ten people. HR or IT systems are often a good place to start because everyone needs to use them.

Once you have a plan for using these 'new' applications, and they begin to add value, you will find requests coming in to solve other business challenges. You will now need to assess each request, test the changes, order them, then figure out who's going to deliver the solution, how long will it take the best way to deliver. But you will at least now have a central point of control to enable you to deliver the tight things, in the right way, solving the right problems.

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