Office 365
Success Factors for Office 365 End User Engagement

The critical success factors impacting Office 365 adoption and how to use them successfully in your rollout
Office 365 changes the way your organization works by enabling individuals and teams to be more productive. We know that this change can have an impact on both your employees and entire organization, therefore it is important to understand the key success factors that contribute towards successful end user adoption of Office 365.

Driving end user adoption means making sure that the people within your organization understand the benefits that will be achieved by working in a new way with Office 365. In order to realize these benefits, it is important to consider some key questions that will help you approach your Office 365 rollout in the right manner:

• Who are the key stakeholders that should be involved in the rollout of Office 365?
• What does success look like? What goals and business outcomes do I need to consider for my organization in its use of Office 365?
• How do I effectively communicate and train people so that they engage with the new technology?

So how can you effectively address these considerations to ensure that you achieve a successful rollout and to maximize the return on your investment in Office 365?

Read on to find out.
Success Factors

With the deployment of Office 365, it is very important upfront to understand the importance of investing in driving adoption. Research shows organizations that are both intentional in driving adoption, and invest in specific activities to drive engagement realize greater Office 365 usage. Those organizations that invest in more than two Office 365 adoption related activities find greater engagement from their users (Figure 1).

Figure 1
Organizations who are Intentional about Driving Office 365 Adoption Realize Greater Usage
Average number of adoption activities per customer in relation to usage

Microsoft Office 365 Usage Research, May 2015

We have identified the most important success factors for driving end user adoption. It is important to understand how each of these success factors can affect the uptake of new technology and how you can use them to your advantage when rolling out Office 365 in your organization.

01. Stakeholders
02. Scenarios
03. Awareness and Training
Securing the participation of key people within your organization

Ensuring that you identify, gain collective buy-in and participation from key stakeholders is integral to the outcome of your Office 365 rollout. As a part of this, one of the most important steps is to select a ‘Success Owner’ from within the organization who will be key to own and drive your desired Office 365 business outcomes. Success Owners can come from any part of the organization, including IT, provided that their focus is on the realization of business value from Office 365 and not just the implementation of the technology.

It is important that a highly collaborative approach is taken, which includes not only Success Owners, Executive Sponsors and Champions, but also those within other integral parts of the business such as HR, Security and Legal.
**Executive Sponsorship**

Having an actively engaged executive sponsor, be it a CEO or business unit leader, is one of the top drivers of project success. An executive sponsor is able to engender support from top-level management and their participation is essential in driving employees’ adoption of new technology.

The executive sponsor creates strategic alignment with the organization by helping set the overarching vision for Office 365 in your organization and tying it to broader organizational objectives and communicating that vision to other leaders across the organization. They also can communicate directly to end users about the importance of adoption and the value and benefits of Office 365, and model the desired behavior through their own use of Office 365.

Research indicates that transformation projects are more successful when there is a visible executive sponsor (Figure 2). Over 85% of respondents indicated that when the CEO was either fairly or very visible, the transformation project was seen as very successful or extremely successful.

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**Figure 2**

**How Visible was the CEO’s or Business Unit Leader’s Involvement in the Transformation**

The Value of Visibility

<table>
<thead>
<tr>
<th></th>
<th>Not Successful</th>
<th>Somewhat Successful</th>
<th>Very Successful</th>
<th>Extremely Successful</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not at all visible</td>
<td>23%</td>
<td>6%</td>
<td>3%</td>
<td>1%</td>
</tr>
<tr>
<td>Not very visible</td>
<td>29%</td>
<td>22%</td>
<td>10%</td>
<td>13%</td>
</tr>
<tr>
<td>Fairly visible</td>
<td>32%</td>
<td>37%</td>
<td>31%</td>
<td>25%</td>
</tr>
<tr>
<td>Very visible</td>
<td>16%</td>
<td>35%</td>
<td>56%</td>
<td>61%</td>
</tr>
</tbody>
</table>


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For more information about how an executive sponsor can contribute to the successful rollout of your Office 365 project, see this resource:

https://aka.ms/execsponsor
**Champions**

Creating and leveraging Office 365 champions within your organisation is another important stakeholder group in driving Office 365 adoption.

In a Microsoft End-User study, research indicates learning from co-workers is among the most effective and used methods in learning a new technology (Figure 3).

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**Figure 3**

*Effective Methods for End-Users to Learn New Technology*

*These methods are under-utilized (low usage, but have high effectiveness)*

- My manager
- Formal training (external)
- IT employee
- Formal training (internal)
- Community forums
- Microsoft’s website
- User guide or manual
- Online tutorials
- Search engine

*Learning via coworkers is among the most effective and most used methods*

- Coworker (non-manager, non IT)
- Myself, through trial and error
  
  Self-learning is largely ineffective, but currently part of learning process for many

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SharePoint End-User Study, Apr 2013, Microsoft Corporation

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It is important to leverage the influence co-workers can have through creating a formal Office 365 champions program. Champions are not only passionate about how they can use Office 365, but are also excited to evangelize and help their peers to learn more about Office 365.

Getting collective buy-in from every user across an organization is a challenge. Champions can help alleviate this challenge and play an important role in the adoption of Office 365. They are knowledgeable, committed to furthering their expertise and are willing to provide peer coaching and assistance.

There are a number of considerations that you’ll need to take into account to ensure success when establishing a champions program. Champions will need to be formally trained, encouraged and empowered to teach, and they also need a clear plan upon which to execute.

For more resources around how to build your own Office 365 champions program and some materials to help you, download this guide:

[https://aka.ms/office365champions](https://aka.ms/office365champions)
02. Scenarios

Defining success and setting clear goals

Any transformation project requires that clear goals are set at the outset. With well-defined targets comes a higher chance of success (Figure 4). 80% of respondents in a McKinsey Global Survey indicated that a well-defined set of financial and operational targets led to an 'extremely successful' transformation.

![Figure 4](image)

Which of the Following Statements Best Describes the Targets Your Company Set to Define Success for the Transformation?

**Targeting Success**

<table>
<thead>
<tr>
<th>Success of Transformation</th>
<th>Not Successful</th>
<th>Somewhat Successful</th>
<th>Very Successful</th>
<th>Extremely Successful</th>
</tr>
</thead>
<tbody>
<tr>
<td>Well defined in financial or operational terms and represented a genuine new level of performance</td>
<td>16%</td>
<td>36%</td>
<td>72%</td>
<td>80%</td>
</tr>
<tr>
<td>Well defined in financial or operational terms but did not stretch the company significantly</td>
<td>20%</td>
<td>32%</td>
<td>20%</td>
<td>13%</td>
</tr>
<tr>
<td>Not well defined</td>
<td>65%</td>
<td>32%</td>
<td>8%</td>
<td>8%</td>
</tr>
</tbody>
</table>

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In planning for an Office 365 rollout, you need to identify your organizations business scenarios. These are the targeted goals that you want to enable your organization to achieve with Office 365.

The process for defining and creating actionable business scenarios for your Office 365 rollout:

01. **Identifying the business scenarios.** It is important to identify and define your business scenarios in the context of your broader organizational initiatives. Work with key stakeholders to identify the business outcomes or goals you’d like to realize with Office 365.

   For more on identifying scenarios see this resource: [https://aka.ms/office365scenarios](https://aka.ms/office365scenarios)

02. **Discovering usage scenarios.** Once you’ve identified your business scenarios, you can begin to discover specific Office 365 usage scenarios to help realize the goals you set. The usage scenarios below can get you started in helping your end users improve their productivity with Office 365.
<table>
<thead>
<tr>
<th>Usage Scenario</th>
<th>Benefits</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Get it done from anywhere</strong></td>
<td>Office 365 gives people across your organization access to everything they need to get the job done from anywhere.</td>
</tr>
<tr>
<td><strong>Email and Calendar on the go</strong></td>
<td>Office 365 is the one stop destination for email, calendars, files, contacts and tasks – all available on the go.</td>
</tr>
<tr>
<td><strong>Collaborate on content</strong></td>
<td>Office 365 gives you the ability to connect to the documents and information you need, when you need them. Collaborate on documents with team members, share reports, and connect with customers – from virtually any device.</td>
</tr>
<tr>
<td><strong>Make meetings matter</strong></td>
<td>Skype for Business makes it easy for people to meet and connect online, from wherever they are, on multiple devices. HD video, screen sharing and real-time note taking help meetings matter.</td>
</tr>
<tr>
<td><strong>Bring your team together</strong></td>
<td>Yammer helps your organization listen, adapt, and grow in new ways by acting like a network. It inspires unity and innovation by allowing people to learn, share, and be heard.</td>
</tr>
</tbody>
</table>

Check out more details on these five Office 365 scenarios that include materials to launch and train your end-users on these scenarios here: [https://aka.ms/commandtraining](https://aka.ms/commandtraining)

You can also use the Productivity Library to map specific tasks against Office 365 capabilities located here: [https://aka.ms/productivitylibrary](https://aka.ms/productivitylibrary)
03. Awareness and Training

Maximize Impact and Adoption

Typically, 34% of users are willing to use new technology rollouts*. Utilizing a combination of internal campaigns and training to promote awareness and ensure end user readiness is crucial in overcoming the typical apathy that greets new technology rollouts.

*CIO Executive Board Business Productivity Database

3a. Awareness

Creating awareness is a powerful way to ensure that you are maximizing impact and driving adoption of Office 365. An awareness campaign could include internal announcements, newsletters, launch events, town hall meetings, contests and giveaways to inform and excite users how Office 365 will help them.

For more information on how to plan your awareness campaign for your Office 365 rollout see our communication guide: https://aka.ms/commandtraining

3b. Training

Training is an essential part of your Office 365 rollout enabling your end users to understand how to effectively use Office 365. The types of training can vary from classroom-style sessions to self-help ‘Getting Started’ guides.

For more information on how to implement an effective training plan for your Office 365 rollout see our training guide: https://aka.ms/commandtraining
Understanding and implementing these success factors are integral to a successful Office 365 rollout. Key to this success is to start by selecting a Success Owner who will drive the continued adoption of this new way of working. Identifying key stakeholders and obtaining support from executive sponsors in crafting your vision will create a solid base to align a rollout from. Identifying business scenarios will help align your business objectives to Office 365, setting the path for end user engagement. It is then important to plan awareness campaigns and training strategies to ensure ongoing usage.

The best way to begin your Office 365 journey is to leverage Microsoft FastTrack for Office 365, the customer success service designed to help you move to Office 365 smoothly and with confidence to realize business value faster.

As part of its engagement with eligible customers*, Microsoft FastTrack for Office 365 will provide guidance, content, and best practices on how to plan for successful adoption of Office 365.

Learn more at http://fasttrack.office.com

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* Eligible customers have at least 50 seats of Office 365 Enterprise/Business SKUs, as well as paid Government SKUs, Kiosk SKUs, and Non-profit SKUs