Softlanding Solutions

Rapid Teams Engagement Menu

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2. Overview

Organizations across all sectors are expanding their usage of Teams to work from home, engage with their stakeholders, deliver remote learning, enable distributed telephony, stream meetings over the internet, and more.

The purpose of this menu of services is to accelerate your adoption of Teams, regardless of your current state. Pick and choose the services you need including network planning, Office 365 validation, Teams client implementation, governance, training and change management, establishing a Champions group, service desk training, training bot implementation, and more.

All engagements begin with assessment and planning to ensure we collectively achieve a meaningful outcome.

All workshops, training, and facilitated activities will be delivered online using Microsoft Teams.

3. Education Sector Clients

Softlanding has unique experience pertaining the to the use of Teams in the education context. Education tenants have additional features enabled through a Teams classroom template including the Class Notebook, Assignment Manager, and Gradebook apps. Teachers will benefit from both toolbox training (how to use the tools) and pedagogical learning, ideally together in the context of classroom use cases. Teachers will benefit from having preconfigured "test" Teams to experiment with as both the teacher and the student roles. It is important that teachers have an opportunity to experiment and learn to gain confidence as an online classroom teacher and be able to empathize with their students' experience in this venue. Providing a learning sandbox (set of experiential Teams) will satisfy this need.

Additional custom policies will be required to restrict certain functionality for students. For example, students use of the private Chat function should be disabled as teachers would be unable to supervise such use.

Depending on a school district's governance posture, there may be requirements for a technical automation or self-service app to simplify the creation of classroom Teams.

A communications plan that includes teachers, parents, and student will be important to support these key members of the school community in being aware of the new model, set expectations, and orient them to help and support when needed.

4.Current State

Scope items are provided to ensure a minimally viable Teams implementation. Those items so marked in the "SL" column must be completed by Softlanding.

Organizations that have already implemented Teams in some fashion will benefit from a review of their configuration and practices in these areas, and where applicable, configuration and practice adjustments.

If an organization has appropriate capabilities and capacity, Softlanding (SL) can guide, train, enable, and support internal staff in executing on key activities. Softlanding can also execute all the activities or some combination of execute, guide, train, enable, and support. To that end, each menu item will be quickly scoped with the client to determine the type and level of required Softlanding execution.

Softlanding can also execute a managed services contract to provide ongoing administration and support needs, where applicable.

The Common Service Summary Menu is provided to indicate what needs to be in place for each service item that a client wants Softlanding to execute. Certain service items may be fully executed by the client but will have different estimates from what is provided here, for Duration and Client Resource commitments. Note that Duration represents the period over which the effort will be expended, and some activities will run in parallel with different Softlanding (or client) resources.

Common Services Summary Menu

Service Area	Service Item	Pre-requisites	Duration	Client Resources
Mandatory Assessment	Assess and determine required service items	None	2.0d	3h Sponsor 4-6h Project lead(s)
Technical Preparation	Ensure proper licensing for Office 365 tenant is established	Tenant established	1.0d	2-8h IT license admin
Technical Preparation	Ensure proper configuration of Office 365 tenant	Tenant established, licensing in place	0.5d	1h IT infrastructure
Technical Preparation	Ensure effective User Identity is implemented	Tenant established, licensing in place	0.5d	4-8h IT infrastructure
Technical Preparation	Ensure understanding of network limitations and options to improve performance of Client local network requirements	Tenant established, licensing in place	1.0d	4-16h IT infrastructure (network)

Technical Preparation	Ensure understanding of minimum standards for desktop, laptop, and mobile devices	Representative inventory	0.5d	2-16h IT operations
Technical Preparation	Rollout Teams app	None	0.25d	2-3h IT operations
Technical Support	Equip Teams Administrators	Teams administrators identified and tenant role access established	2.0d	4-6h IT infrastructure
Technical Support	Equip the Service/Help Desk	Service Desk has Teams access	2.0d	4-6h IT service desk
Discovery & Planning	Establish project leadership, key objectives, and a basic plan	Sponsor identified	3.0d	4-6h Sponsor, project team members
Discovery & Planning	Establish Teams settings and policies to support Client employee policies and union contracts	Key documents provided; Tenant admin access for SL	3.0d	1-2h Project lead 1-2h IT infrastructure
Discovery & Planning	Establish common essential business use cases to guide internal rollout, training, and support	None	3.0d	2-4h Project team members
Discovery & Planning	Establish Teams information architecture	None	3.0d	4-6h Project team members
Adoption, Change Management, Success	Establish common communication templates and artifacts	Current standard templates	1.0d	2h Project lead, communications lead
Adoption, Change Management, Success	Establish a Champions team	Tentative set of champions identified	4.0d	4-8h Project lead 2h Champions, project team
Adoption, Change Management, Success	Establish common Teams best practices and guidelines	None	3.0d	2-4h Project team
Adoption, Change Management, Success	Establish a rapid adoption process	None	3.0d	2-4h Project team
Adoption, Change Management, Success	Establish a Digital Centre of Excellence	SharePoint online established; SPO admin access for SL	5.0d	2h IT infrastructure 4h Project team

Adoption, Change Management, Success	Establish adoption monitoring and reporting	Office 365 tenant admin access for SL	3.0d	2-4h IT infrastructure 2h Project team
Governance	Establish work from home policy and guidelines	Client employment handbook, union contracts	3.0d	1h Project lead
Governance	Establish Client RACI for Teams Administration and Support	IT organization chart and role descriptions	2.0d	1h IT director
Governance	Establish Teams naming standards	List of Client departments, committees, (schools, courses, divisions) and other structures	2.0d	1h Project lead
Governance	Establish Teams lifecycle standards	Client retention policy (if existing); Office 365 tenant admin access for SL	2.0d	1h Project lead 1h IT infrastructure
Governance	Establish Teams settings and policies	Office 365 tenant admin access for SL	3.0d	1h IT infrastructure
Governance	Add Governance to Centre of Digital Excellence (CODE)	Governance artifacts; Access to CODE for SL	2.0d	1h IT infrastructure
Design and Deploy	Establish up to four Teams templates	Client organization structure	5.0d	5-7h Project team
Design and Deploy	Implement a self-service Teams provisioning tool	Office 365 tenant admin access for SL	4.0d	2h IT infrastructure, project team
End-user Training	Provide toolbox training sessions for common Teams and Office 365 features	Teams and Office 365 access for SL including creation rights	5.0d	2h Sponsor, Project team, up to 120 end users

4.1. Mandatory Assessment of Service Needs

Service Item	Deliverables	SL	SL Effort
Assess and determine required service items	One 3-hour workshop delivered to assess and discover the Client's specific needs and capacity. An agreed-to list is provided for service items to perform with Client and Softlanding RACI.	X	0.5d prepare and deliver workshop 0.5d synthesize workshop results and establish service items and RACI

4.2. Technical Preparation

Service Item	Deliverables	SL	SL Effort
Ensure proper licensing for Office 365 tenant is established	Current user licensing information reviewed, licensing requirements determined, and necessary additions identified. Guidance provided to purchase and apply licenses to users.		0.25d review / determine licensing 0.25d provide guidance
Ensure proper configuration of Office 365 tenant	Configuration details reviewed and recommended changes provided to achieve minimum requirements. Guidance provided to implement recommended changes.	X	0.5d review, recommend, and guide
Ensure effective User Identity is implemented	Current identity details reviewed, and recommended configuration and implementation guidance provided for Azure Active Directory.	X	0.5d review, recommend, and guide
Ensure understanding of network limitations and options to improve performance	Teams Network Planner configured and report with recommendations provided.		0.5d configure Teams Network Planner and provide recommended firewall configuration

Service Item	Deliverables		SL Effort
of Client local network requirements	Recommended firewall allow and prioritization addresses provided for Office 365 and Azure cloud destinations.		
Ensure understanding of minimum standards for desktop, laptop, and mobile devices	Recommended minimum hardware, operating system, and Office software standards provided for Windows, Mac, iOS, and Android devices.		0.25d confirm and provide minimum standards
Rollout Teams app	Guidance provided for rolling out the Teams app to Client and personally owned devices.		0.25d provide Teams rollout guidance

4.3. Technical Support

Service Item	Deliverables	SL	SL Effort
Equip Teams Administrators	One 1.5 hour Teams and Office 365 templates and governance orientation session provided to Teams Administrators. One 2-hour basic Teams Administration training session and online resource list provided.	X	1.0d develop and provide orientation and training
Equip the Service/Help Desk	One 1.5 hour Teams and Office 365 templates and governance orientation session provided to Service/Help Desk. One 2-hour basic Teams familiarization and user support training and online resource list provided.		1.0d develop and provide orientation and training

4.4. Discovery, Planning

Service Item	Deliverables	SL	SL Effort
Establish project leadership, key objectives, and a basic plan	Project sponsor(s) and team members are identified. Two 2-hour workshops provided to establish and prioritize key objectives to guide the project and monitor adoption and success and develop a high-level project and communication plan. High level project and communications plans provided.	X	1.0d prepare and deliver workshop 1.5d synthesize workshop results, document prioritized objectives, and create high-level plans
Establish Teams settings and policies to support Client employee policies and union contracts	Employee policies and union contracts reviewed, and relevant clauses highlighted. Compliant list of Teams settings and policies provided and implemented.		1.0d review documents and highlight 0.5d provide and implement list of customized Teams settings and policies
Establish common essential business use cases to guide internal rollout, training, and support	One 2-hour workshop provided to facilitate selection of common essential use cases to support. Documented list of priority use cases provided.		0.5d prepare and deliver workshop 1.0d synthesize and document workshop results
Establish Teams information architecture	Two 2-hour workshops provided to develop a Teams information architecture (types of teams, initial structure, and purpose). Documented Teams information architecture provided.		1.0d prepare and deliver workshops 1.0d synthesize and document workshop results

4.5. Adoption, Change Management, and Success

Service Item	Deliverables	SL	Effort
Establish common communication templates and artifacts	Templates (up to four) provided to use as email messages for project kick-off and key milestones.		0.5d create template messages
Establish a Champions team	Champion role description and RACI provided. One 2-hour training session provided to the Champions team. Curated set of relevant resource links provided.	X	0.5d create description and RACI 1.0d create and provide training 0.5d curate resource links
Establish common Teams best practices and guidelines	One 2-hour workshop to review and finalize common best practices with project team and champions. Best practices documented and provided.		0.5d develop and provide workshop 0.5d provide best practices
Establish a rapid adoption process	One 2-hour workshop provided to brainstorm the steps and activities required for rapid adoption. Adoption process with details provided.		0.5d prepare and deliver workshop 1.0d synthesize and document workshop results
Establish a Digital Centre of Excellence	SharePoint site established to store Teams governance, training, support, and guidance materials. One 2-hour basic training provided for maintaining content.		2.0d design and create basic SharePoint knowledge centre site 0.5d prepare and deliver training session
Establish adoption monitoring and reporting	Data sources defined / mapped to key objectives.		0.5d define monitoring and reporting

Service Item	Deliverables	SL	Effort
	One 2-hour training session provided for monitoring and reporting.		0.5d prepare and deliver training session

4.6. Governance

Service Item	Deliverables	SL	Effort
Establish work from home policy and guidelines	Basic work from home policy and guidelines provided.		1.0d write basic policy
Establish Client RACI for Teams Administration and Support	RACI provided.		0.5d develop RACI
Establish Teams naming standards	Team, Channel, and Tab naming standard provided.	X	0.5d develop standards
Establish Teams lifecycle standards	Standardized Teams lifecycle settings (renewal, disposal, recovery) provided. Standards implemented.	X	1.0d develop standards 0.5d implement standards
Establish Teams settings and policies	Standardized Teams settings and policies provided. Standards implemented.	X	1.0d develop standards 0.5d implement standards
Add Governance to Centre of Digital Excellence (CODE)	Governance artifacts added to the CODE		1.0d add artifacts to the CODE

4.7. Design and Deploy

Service Item	Deliverables	SL	Effort
Establish up to four Teams templates	One 3-hour workshop provided to brainstorm design starting from pre-configured templates (Organization-wide, Department, Project, Elementary School, Secondary School, Client, Working Group, Committee). Templates created.		1.0d prepare and deliver workshop 2.0d synthesize workshop results, finalize, and validate templates
Implement a self-service Teams provisioning tool	Provisioning tool installed with approval workflow. One 1-hour training session provided to IT infrastructure and project team for configuration and use.	X	1.0d install tool 0.5d prepare and deliver training

4.8. End-user Training

Service Item	Deliverables	SL	Effort
Provide toolbox training sessions for common Teams and Office 365 features	Four 2-hour (offered as two 1-hour sessions) online training with basic hands-on opportunities. Two-hour recording (two 1-hour).		3.0d prepare, schedule, and deliver training