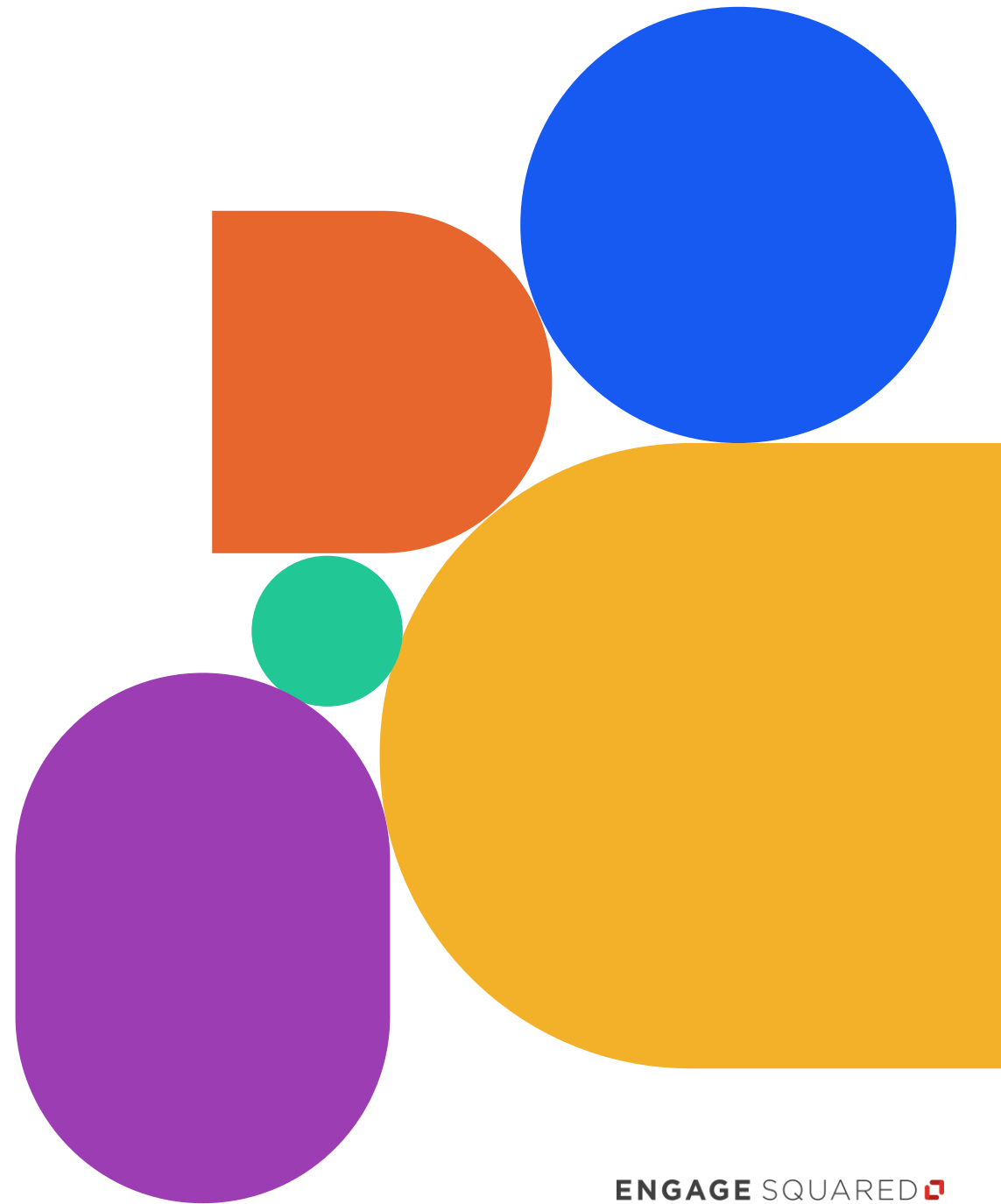


Offer overview

# Microsoft Teams Meetings

Change Management support



About us

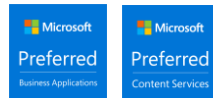
# We are Engage Squared.

Specialists in <people> friendly technology.

Our mission is to make work better. We are one of a small number of technology consultancies in APAC that provide end-to-end support for our clients, helping to tackle issues ranging from employee experience, business process automation, compliance and records management, technology adoption and more.

From design, to technical build, our team of experts use their broad range of skills across project delivery, cloud strategy, user experience design, governance, agile development, change management, and security to help our clients get the most of technology.

We specialise in a range of technologies, and partner with leading providers such as Microsoft, ServiceNow, AvePoint, Glint, SWOOP Analytics and many others. We take partnerships seriously and were proud to be named the **2022 global winner of the Employee Experience Microsoft Partner of the Year award.**



Yammer Adoption Specialist



Microsoft Teams Collaboration Specialist

# Engagement overview

**The research is clear – meetings are one of the biggest productivity killers for most organisations.**

To support this, Engage Squared will partner with you to deliver a targeted change program that coaches key staff (e.g. senior leaders and champions) on how to best use the technology available to them and run effective meetings regardless of where they are.

We'll work with you to uncover pain points within your organisation and design a change program that increases the quality of collaboration across your staff.



## Internal product experts

Who can continue to support sustainable growth and knowledge transfer of the different meeting options in Microsoft Teams (e.g. when to use a **Live Event** or **Webinar** over a **Meeting**)



## Executive leaders and champions who understand best practices and industry standards

Helping them '**walk the walk**' and confidently understand how to use Microsoft Teams (and M365 more broadly) for more efficient and engaging meetings



## A reinvigorated champions' network

Who can act as an extension of the core change team – supporting the adoption of new meeting behaviours and rituals

# Project approach

To support successful adoption of hybrid meetings, we'll split our work into three phases:

## Phase 1: Prepare Discovery and strategy

- Starting with a small amount of discovery and analysis will provide us with the right context to validate that your initial requirements are fit-for-purpose and to design a change plan that speaks to the bigger picture at your organisation
- This phase will include desktop research, a small number of discovery workshops to understand your current state in more detail
- The outputs of which will be a change action plan that covers activities to support re-engaging champions (if you have an existing champion's network) and deliver a series stakeholder engagement activities



## Phase 2: Deliver Stakeholder engagement and coaching

Using our existing bank of training collateral, we will create supporting resources and deliver a series of training targeted at specific audiences. This will include:

- Updating any existing learning collateral your organisation has developed
- Creation of additional training materials e.g. short videos, cheat sheets or toolkits
- Delivering executive training and coaching
- Champions community coaching and regular check-ins



## Phase 3: Sustain Transition to BAU

True value realisation relies on equipping the right people with the right knowledge and skills. To ensure our efforts can be appropriately transitioned and sustained, we propose aligning the following activities with longer-term goals of the program:

- Train-the-trainer sessions
- Handover of key change activities to BAU

# Supporting training collateral

Building off your existing branding, and using our knowledge of your M365 environment, we will create a series of self-serve training collateral (e.g. user guides, cheat sheets and short videos) that specifically outline practical ways in which staff can run more effective hybrid meetings in Teams and related apps.

Where possible, we will use our existing IP around best-practices and tips for smarter meetings and will tailor messages based on your organisations specific business rules and technical environment. This could include:

- **Comprehensive user guide x 1:** covering how to use in-room meeting tech, and start, stop, continue behaviour for the entire meeting experience
- **Cheat sheets x 3:** a dedicated cheat sheet for each 'stage' of the meeting experience, with recommended meeting rituals and applications
- **Short videos x 4:** everyone learns differently. While some prefer written materials, others like a more visual medium. We recommend creating a series of short videos

**NOTE:** The content and format for self-serve training collateral will be validated as part of our prepare and discovery activities.

**Your wellbeing**

As we settle into a new, hybrid working environment, it's important to take care of your personal wellbeing. Check out some of our tips below to help you focus on the things that really matter.

- Stick to a routine**
  - **Set a routine**  
Stick to your routine even when you're working from home. Use your commute time on something productive like going for a walk.
  - **Get ready for work**  
Get into work mode by putting on your work clothes.
  - **Shut it down**  
Shutting down your computer at the end of the day helps your body realise it's time to relax.
- Increase your focus**
  - **MyAnalytics**  
Find insights from MyAnalytics to help increase your focus.
  - **Focus time**  
Focus time.
  - **Set your status**  
Change your status to help indicate when you're focused.
- Be kind to yourself**
  - **Take regular breaks**  
Step away from the computer, go for a walk or sit on the floor.
  - **Set boundaries**  
Try to set boundaries to help switch off from work.
  - **Move your body**  
Try to get outside for some fresh air every day. It's good for your mind and body.
- Manage it**
  - **Set goals**  
Set goals to help you stay on track.
  - **Declutter your workspace**  
Pin your priorities to your workspace.
  - **Prioritise your time**  
Prioritise your time.

**Managing meeting fatigue**

Researchers have found the **brainwave markers** associated with overwork and stress are significantly higher in video meetings than non-meeting work like writing emails. Due to high levels of sustained concentration in online meetings, fatigue sets in within 30-40 minutes.

- Microsoft Teams has included a **series of updates**, to help manage meeting fatigue and create a more human connection. See some of the creative new features below:

- Together mode**
  - Displays all participants in a virtual space, such as an auditorium, meeting room or coffee bar to give the feeling everyone is in the same location.
  - Replaces the traditional grid display.
  - Users say **Together mode** has a profound impact and provides more cohesion to the group.
- Dynamic view**
  - Allows users to share content like slide decks or videos alongside other speakers.
  - Pin key participants in your video meeting to display them next to the presentation.
  - With **Dynamic view**, users can automatically optimise their view of the content, while customising the experience to suit their needs.

**What's your collaboration strategy?**

Taking time to prepare and plan for how your department/team will collaborate, will increase the chances of your team using Office 365 in a way that will help you deliver the outcomes you want.

**Developing a collaboration strategy**

- **Which tool when**  
Review our recommended which tool when document and start to think about your own.
- **House rules**  
Agree with your team how you are going to collaborate and use the tools for collaboration.
- **Champions**  
Bring champions onboard within your department/team to support you in building this strategy and setting your teams up for success.
- **Training and self-service support**  
Encourage training attendance and use of the self service support available to end users.

Commonwealth Bank of Australia | Confidential

**Collaboration in practice**

Executive support: "Teams helps me effectively manage and capture information"

Personal	Executive	Team	Cross function
<b>Teams helps to improve efficiency</b> <ul style="list-style-type: none"><li>✓ Access all of your personal applications under one hub</li><li>✓ Customise your activity feed in Teams and consume what you need, when</li><li>✓ Managing multiple executives from one screen</li><li>Use Teams as your one stop shop for everything</li><li>Stop using your inbox as your default place for managing workflows</li></ul>	<b>Sensitive information collaboration</b> <ul style="list-style-type: none"><li>✓ Keep sensitive information safe with private Teams</li><li>✓ Collaborate without compromising security</li><li>✓ Communicate quickly with executives via the mobile app</li><li>Work collaboratively in the shared team channels</li><li>Stop sending email and attachments to your executive</li></ul>	<b>Team information capture and planning</b> <ul style="list-style-type: none"><li>✓ Use transparent Team channels to help when planning</li><li>✓ Use team OneNote and Planner to centrally store and track content</li><li>✓ Make it easier for colleagues to follow tasks after leave</li><li>Have conversations in channels and attach documents in Teams</li><li>Stop "Replying All" to emails and sending attachments</li></ul>	<b>Cross department collaboration</b> <ul style="list-style-type: none"><li>✓ Connect with the wider business when you need approval or advice</li><li>✓ Use live documents reduce duplications and confusion</li><li>✓ Built cross departmental communities and connect in</li><li>Leverage new ways to build connections on Teams</li><li>Stop relying on emails to complete tasks across departments</li></ul>

Commonwealth Bank of Australia | Confidential

Screenshots from better meetings training collateral developed for Commonwealth Bank

# Toolkits

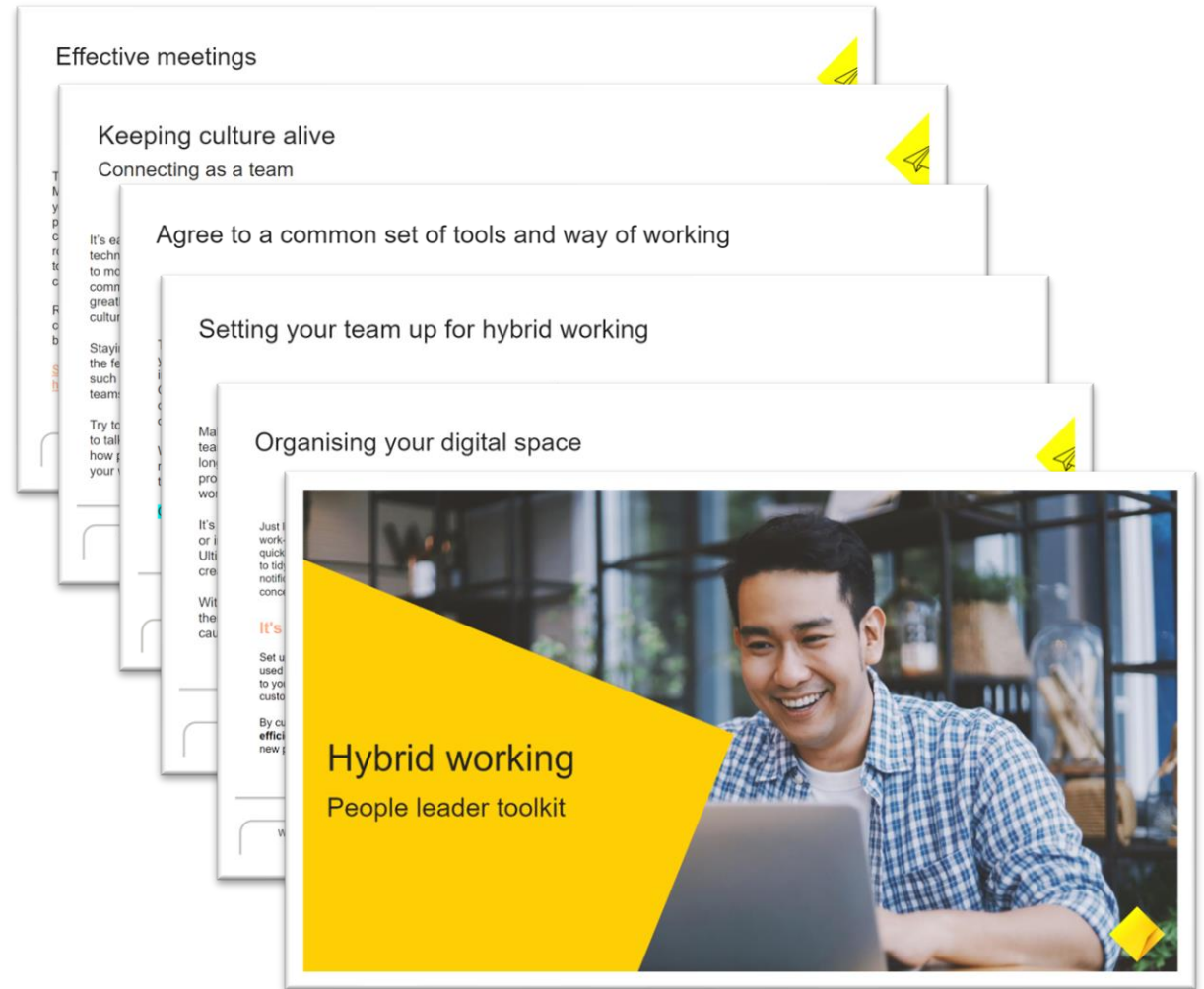
Toolkits and playbooks are an invaluable way to share knowledge and upskill key groups to champion change.

Our toolkits can be developed in several formats (e.g., interactive OneNote, PDF, or SharePoint site pages). Depending on the preferences of staff, the toolkit can be read as small 'bite-sized' chunks (like a cheat sheet) or whole.

**We recommend building two toolkits, targeted at your people leaders and champions:**

- Leader toolkit for working with virtual teams
- Leader and champions toolkit for running effective meetings

The contents for each will cover both practical use of Teams and other related apps (e.g., Whiteboard, Planner, OneNote). It will also focus on the meeting and collaboration behaviours staff should adopt to support better hybrid meetings.



*Example People Leader Toolkit developed for Commonwealth Bank*

# Executive coaching

## It's not new – senior leaders spend a lot of time in meetings.

It's important that each meeting is as productive and valuable as it can be. Our experience has taught us that it's just as important to upskill the staff who support leaders, for example EA's, Business Managers etc. Like champions, people leaders are key change agents and have a tremendous amount of influence over the culture and work practices of an organisation.

We've found that the following mix of coaching options are most suitable for this audience. Each session offering includes the development of a facilitator guide and accompanying resources (e.g. presentation deck where required).

These materials will be provided to relevant stakeholders within your organisation as part of our train-the-trainer activities, to ensure knowledge can be used well beyond the life of this program.

## Recommended approach:

### 1:1 short coaching sessions

30-min 1:1 sessions with the executive focused on core collaboration and productivity features in Microsoft Teams to support better meetings. In addition, we'll cover the pre, during and post meeting rituals that senior leaders can follow to support better, more efficient meetings.

### Small group coaching sessions\*

45min – 1hr sessions with the executive and their immediate team, e.g., GM, EA, Business Manager. These can be aligned to core meeting scenarios (e.g., how to run better board meetings in Teams) or different ways to meet in Teams. Like the 1:1 sessions, these focus on the pre, during and post meeting rituals that teams can adopt to improve collaboration and communication in the lead-up to, during and after a meeting.

### Dedicated EA group coaching\*

To support EA's in their role, we recommend hosting dedicated EA group coaching sessions, where we dive deeper into what's possible with Microsoft Teams and the broader M365 suite (e.g. OneNote, Planner) to support better meetings. These sessions will be aligned to core meeting scenarios that we identify during our initial discovery activities.

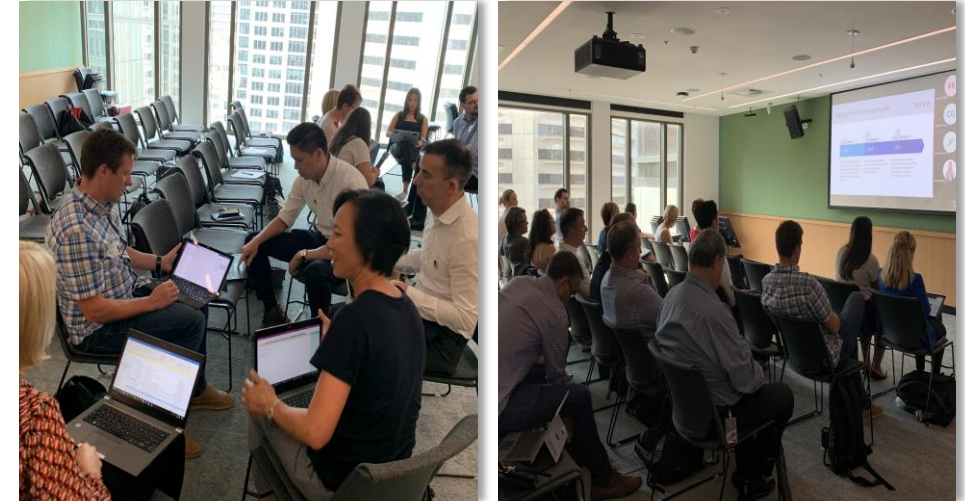
*\*Group coaching sessions will be recorded for future use by your organisation.*

# Optional: Champions or 'power user' program

If you have an existing champions' network, we will re-engage the existing network as well as recruit some new champions. We treat champions as an extension of our change team; they're change agents 'on the ground', modelling new behaviours and best practice use of meeting technology among their colleagues.

## To support the champions network at your organisation, we will:

1. Develop communications materials to recruit new champions
2. Facilitate a champions kick off session to communicate the 'why' plus roles and responsibilities (gives vs gets of being a champion)
3. Stand up a dedicated 'Hybrid Meetings' channel in the Champions Team for sharing information and crowd-sourcing support
4. Facilitate a virtual champions activation day – upskilling champions on the fundamentals of change management and providing them practical skills on how to facilitate meetings with Microsoft Teams
5. Facilitate regular champions calls (usually 30 mins per fortnight) to share tips and check in on any challenges and success that they may be experiencing
6. Build a 'Running Effective Meetings Champions Toolkit' which covers the main concepts from the activation day and links to relevant resources



Champions activation day at Westpac



# Train-the-trainer sessions

Ultimate value realisation will rely on your organisation's ability to continue driving change long after this project is complete. To support this, we will deliver **two comprehensive train-the-trainer sessions** designed to upskill key staff at your organisation on M365 and hybrid meetings.

**Each session will be delivered virtually, over 90 minutes.**

- The sessions will be interactive, allowing participants to put into practice the theories and concepts they will learn about and get on-the-spot feedback from our facilitators and their peers.
- Participants will be provided with facilitator guides and accompanying resources so they can quickly put into practice the knowledge shared during the sessions.
- Based on the scope provided, we recommend the following session topics for the train-the-trainer sessions, these can of course be changed to suit your needs.

1

## Session 1: Advanced Microsoft Teams training

- Tips for facilitating Microsoft Teams training in virtual and physical settings (including tips for managing 'breakout' rooms and 'hybrid' meetings)
- An in-depth walk through of our advanced Microsoft Teams training course
- Top tips for governing your Microsoft Team groups (including etiquette)
- What's coming to Microsoft Teams on the M365 roadmap

2

## Session 2: Running smarter meetings with Teams

- Common types of meetings (presentation, creation, delegation, deliberation)
- Tips for managing the entire meeting experience – i.e. before, during and after
- When to choose a **Live Event** or **Webinar** over a **Meeting**
- How to produce and present in a Live Event
- Tips for facilitating hybrid meetings
- How to make your meeting memorable (getting attendees to engage)

**NOTE:** Each session will include pre-session survey, to benchmark capability and a post-session evaluation to confirm key learnings have been understood by staff.

# Investment overview

## Activities will include:

- Discovery and change planning
- Creation of self-serve training collateral
- Delivery of a targeted hybrid meetings change and adoption campaign
- Delivery of train-the-trainer sessions
- Adoption measurement and recommendations for sustaining the change

**\$125,000**

Indicative cost.  
AUD ex GST

**12 weeks**

Estimated



# About us



**2,000,000+**  
people use an intranet  
built by us



**150+**  
Digital Workplace  
transformations



**70**  
Our intranets are  
used in 70 countries



**6,000,000**  
Records migrated



Melbourne  
Sydney

Brisbane  
Perth

Canberra  
Auckland

Wellington  
Minsk

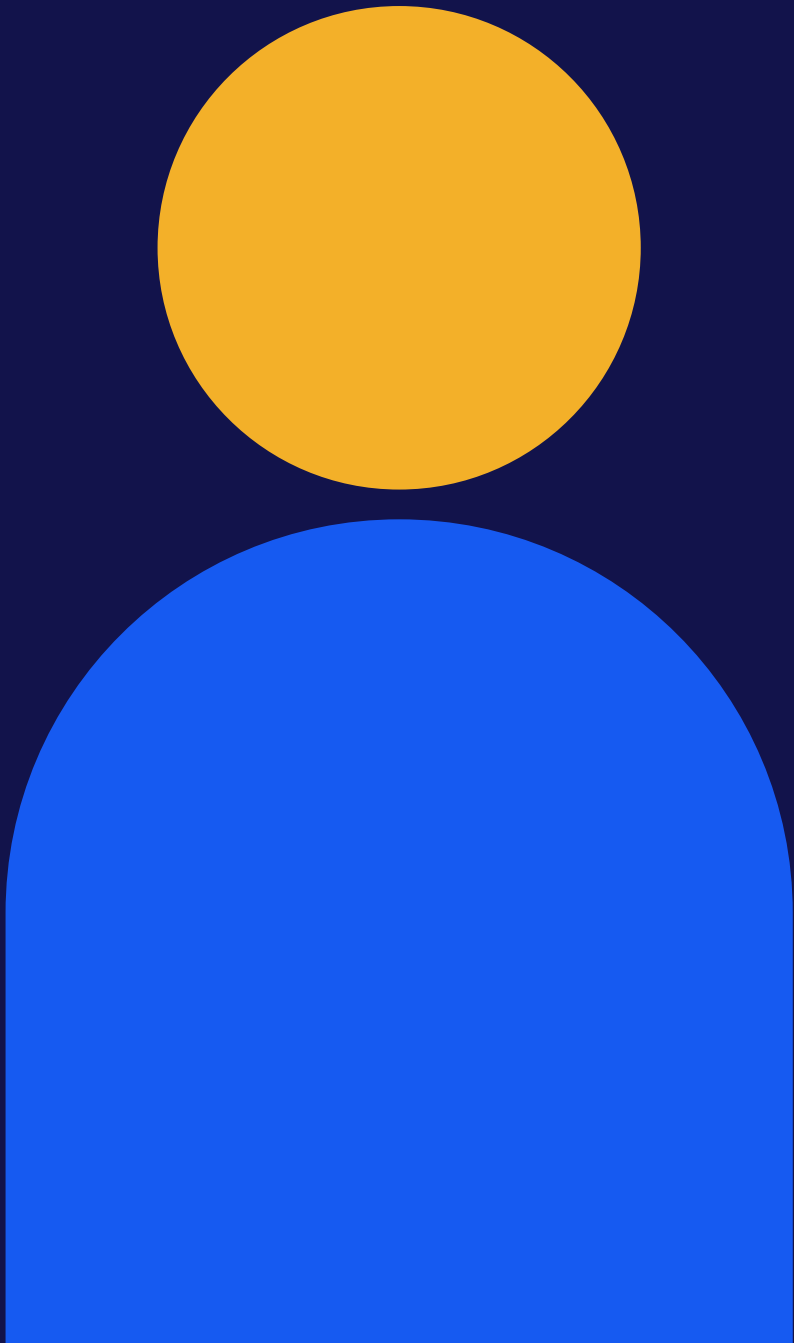


# Get in touch

[engagesq.com](https://engagesq.com)

[info@engagesq.com](mailto:info@engagesq.com)





<people>  
friendly  
technology

**ENGAGE** SQUARED 