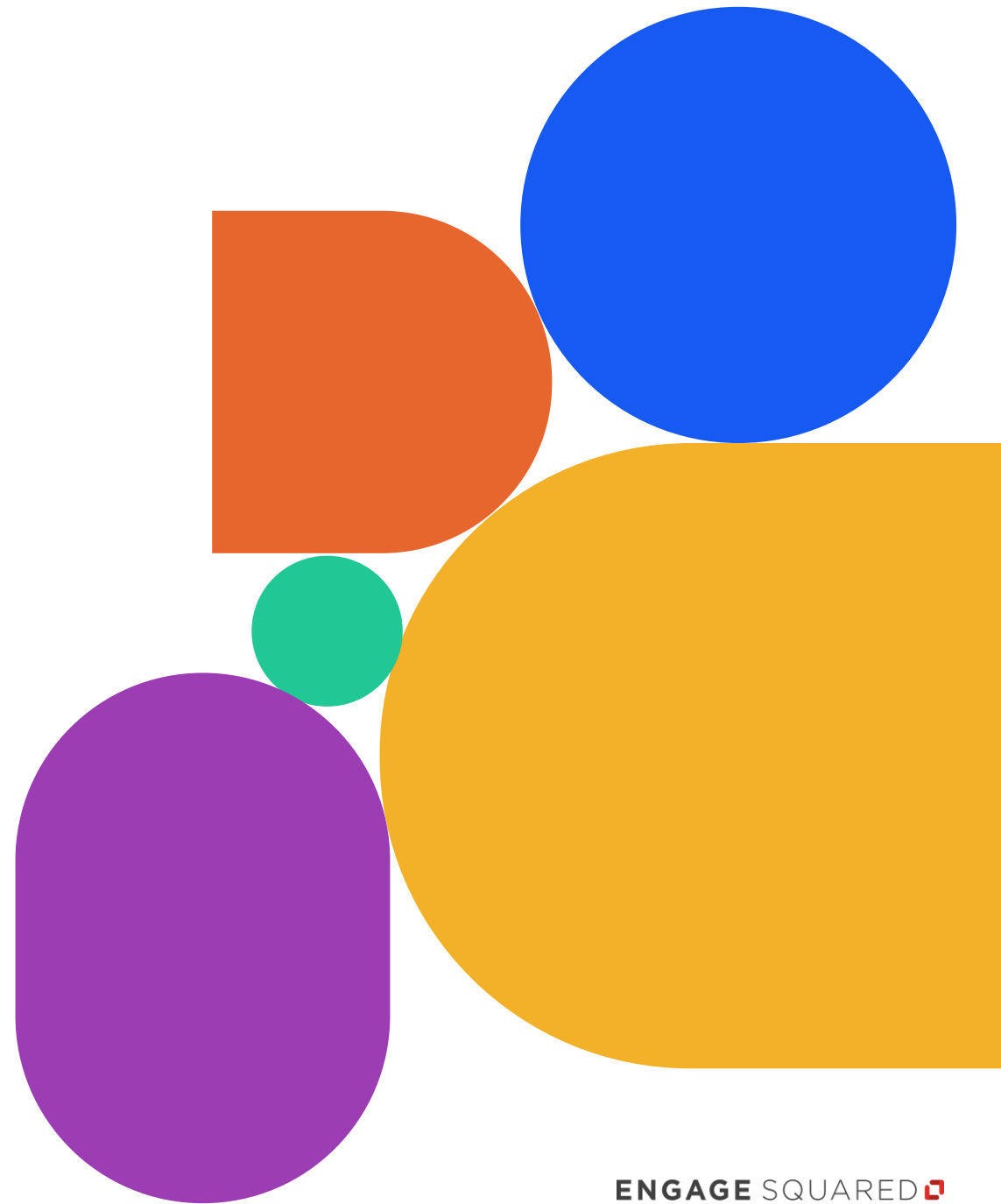


Offer overview

Transition to M365

We'll work with you to understand the impact of transitioning to M365 and develop a strategy that supports a seamless transition while setting you up for sustained adoption



About us

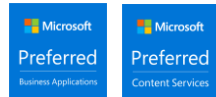
We are Engage Squared.

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

While there are plenty of technical steps that need to be completed for a smooth transition to M365, it's equally important that you consider:

1. The impact on staff within your organisation
2. Potential changes to ways of working
3. Potential changes to existing processes

This is where our transition to M365 change & adoption services come in. We'll work with you to understand the impact of the change and develop a strategy that supports a seamless transition while setting you up for sustained adoption of M365 (long after our project is complete).

The particulars



Timeframe: 3-6 months



Indicative cost: ~\$150,000



Engage Squared resources: 4



A clear change strategy that covers the bigger picture

Covering the practical activities needed to support pre, during and post migration, plus a longer-term high-level roadmap that's aligned to your overarching organisational strategy.



A comprehensive change program where staff feel supported

Helping to drive awareness of the change and ensure a seamless cut-over. Reducing the pressure for IT service desk and frustration from users.



Established base-level competency across your staff

To ensure staff are familiar with core collaboration tools within M365 (e.g. Outlook, MS Teams, OneDrive etc.) and understand basic governance and security features and processes.



Identified opportunities for process and productivity improvements

Mapped business scenarios that are aligned to key personas in your business, to help you fully leverage your investment in M365.

Our proposed approach

To ensure our change activities are well informed and tightly aligned to your objectives, we'll leverage our **Prepare, Deliver, Sustain** methodology.

This approach will help us work in tandem with your technical migration schedule – meaning we can maintain momentum throughout the engagement.

We believe no change initiative will 'hit the mark' from the vert outset. To ensure we provide as seamless an experience as possible, we'll also establish channels to regularly capture lessons learnt from previous migrations or tranches so we can continuously improve the employee experience for staff.



Prepare

Understand the context of your organisation and people.

During this phase we:

- Outline your vision and objectives
- Undertake desktop research & interviews
- Prepare the CM team, including primary sponsor
- Define your master change management strategy



Deliver

Scale and implement the *five levers of change* to support people through the transition.

1. Stakeholder engagement
2. Communications
3. Education & training
4. Resistance management
5. Coaching



Sustain

Key to ongoing success is ensuring the appropriate mechanisms are in place to sustain the change well into the future.

During this phase we:

- Collect and analyse feedback
- Identify gaps and manage resistance
- Celebrate success!

Part 1: Design and discover

We begin with a **'Prepare'** phase of discovery, prioritisation and planning. Starting with in-depth discovery and organisational analysis is essential to ensuring change management is aligned and targeted to the people in your organisation. It is also important for building awareness with sponsors and leaders, and for identifying areas of potential resistance.

Specifically, we will focus on:

- Reviewing any existing strategies and plans
- Defining your vision for success
- Identifying key stakeholders within your organisation who will form part of our extended change team – including a primary sponsor, communications representative, learning and development representative, people leaders and select influencers
- Undertaking extensive stakeholder research to inform the development of custom personas for each major Business Unit and accompanying business scenarios
- Planning change activities (e.g. coaching, communications, training) in-line with the deployment schedule, following our 'cascading campaign' approach – to ensure we help to sustain the change and step your staff through the change

Lisa – The Trailblazer

Bio
I am someone passionate about improving how my department works. I know that technology can help (and I'm excited to try new things), but I know that changing behaviours and looking at our business processes is the first step. Changing the way we work may be my main role for a set period, but I may be doing it in addition to my other roles.

Example roles
Manager
Admin (esp those building a new department)
Strategy project manager
Project manager
IMO officer
PMO officer
Change manager
Almost anyone :)

Responsibilities
• Understand the 'Way we work' at Transport
• Lead the 'Way we work' strategy for their department
• Develop a change plan for their department
• Work with senior leaders for buy-in and to deliver messaging
• Understand my departments business processes and pain points

Relevant roles
This can be exec right down to train driver it really does not depend on the role for front line will include station staff engineering opal officers and train driver – guards

M365 technical proficiency
Low Med High

Persona characteristics
Mobile: High
Dedicated device: High
Customer Facing: High
Content creator: High

James – 'Way we work transformer'

Bio
I am James. I wear multiple hats at TNSW. Some days I go to work as the Secretary, and other days I drive a train, do budgets, provide IT help or fix bridges. In my role as a "transformer" though I am a 'doer' showing people new ways of working and how they can do it in their role using the devices they use everyday.

Relevant roles
This can be exec right down to train driver it really does not depend on the role for front line will include station staff engineering opal officers and train driver – guards

Responsibilities
• Lead by example
• Take in feedback and work out answer, if not possible bring back to core team
• Look at new ways of working, dissect, analyse and implement
• Keep up to date on changes
• Advocate what is new
• Advocate how to
• Keep refreshing and updating

Challenges
• Needs to be empowered
• Needs expertise by in
• Needs confidence
• Needs the technical knowledge

Needs and wants
• Need the learning materials
• Needs training on how to do the role
• Wants to be expert and respected

M365 technical proficiency
Low Med High

Persona characteristics
Mobile: High
Dedicated device: High
Customer Facing: High
Content creator: High

Way of Working characteristics
Office based: High
Shared devices: High
Corporate: High
Content consumer: High
Collaboration: High
Meeting: High
Email usage: High

Business unit	Month 1		Month 2				Month 3				Month 4						
	Wk 1	Wk 2	Wk 3	Wk 4	Wk 5	Wk 6	Wk 7	Wk 8	Wk 9	Wk 10	Wk 11	Wk 12	Wk 13	Wk 14	Wk 15	Wk 16	
BVAC Head Office Support	Stakeholder research and persona/scenario design	Persona & scenario validation	Launch days & general training				Targeted business scenario implementation										
Dental AU Head Office			Stakeholder research and persona/scenario design	Persona & scenario validation	Launch days & general training				Targeted business scenario implementation								
Healthcare Management and Innovation					Stakeholder research and persona/scenario design	Persona & scenario validation	Launch days & general training				Targeted business scenario implementation						
Healthcare Insurance – Customer Service							Stakeholder research and persona/scenario design	Persona & scenario validation	Launch days & general training				Targeted business scenario implementation				
Healthcare Insurance – Customer Growth									Stakeholder research and persona/scenario design	Persona & scenario validation	Launch days & general training				Targeted business scenario implementation		
Retrospective Business Unit training	In-person & webinar Teams training																

Phase 2: Delivering change

Following the 'Prepare' phase, we will move into '**Delivery**', implementing the activities outlined in the master change strategy and accompanying plans. This phase is focused on boosting the three 'human factors of ROI' (i.e. speed of adoption, ultimate utilisation, proficiency) to support a seamless user transition from the current to future state.

Specifically, we will focus on:

- Delivering general and scenario-based training – using the cascading campaign model described in 'part 1'
- Developing communications and supporting materials to generate awareness, for example, email templates, posters, quick reference materials
- Building a coalition of people leaders and power users who will champion new ways of working among their team
- Continuously adapting our change approach based on lessons learnt from previous Business Unit transitions, so we are meeting the needs of our users



Example awareness collateral for Win 10 & M365 rollout at Essential Services Commission

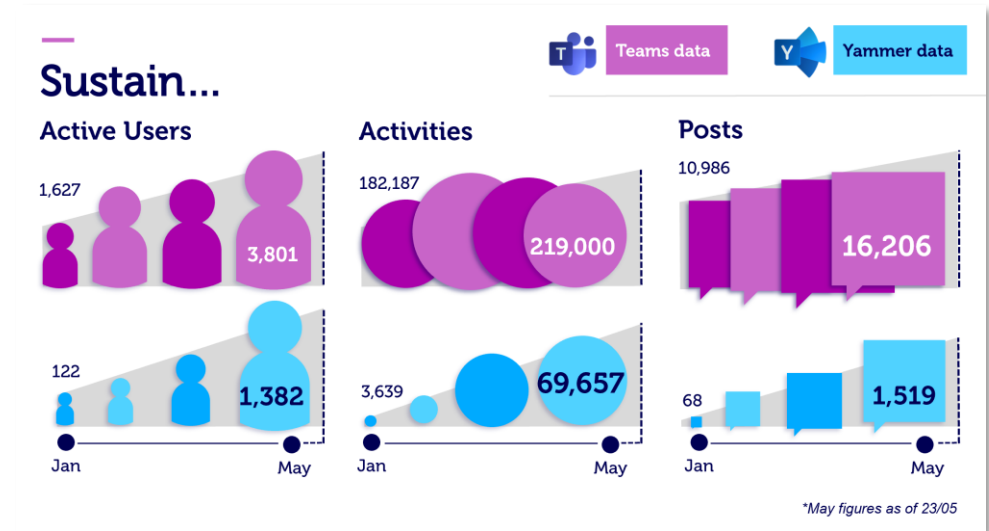
Phase 3: Sustaining change

Key to ongoing and successful change management, is reinforcing the change for employees. Our '**Sustain**' phase is focused more directly on measuring impact and ensuring that employees understand and realise the value of the new technology.

In addition to supporting the activities in our deliver phase, we will focus our efforts on building a lasting change muscle across your organisation; helping key stakeholders (e.g. champions, senior leaders, and the IT Team) to sustain the adoption of Office 365 (particularly Teams) well beyond the life of this program.

Key activities during this phase include:

- Collect and analyse feedback – including facilitating lessons learnt sessions
- Identifying gaps & resistance – using metrics in the M365 Admin Centre & qualitative feedback from your organisation (e.g. post training surveys etc.)
- Transitioning core activities for BAU – to ensure your core project team can continue to sustain the change once the project is complete



Example measurement – RMIT adoption program

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

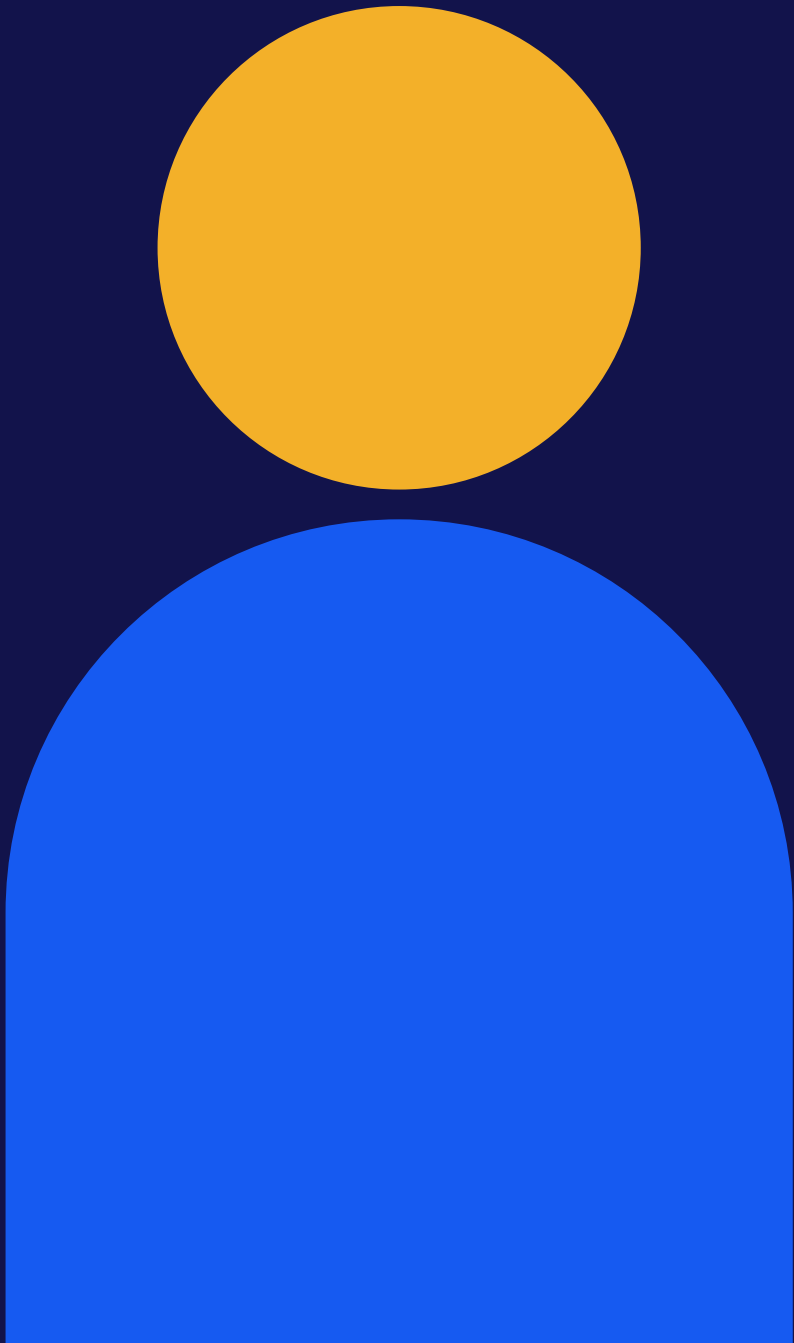


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<people>
friendly
technology

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