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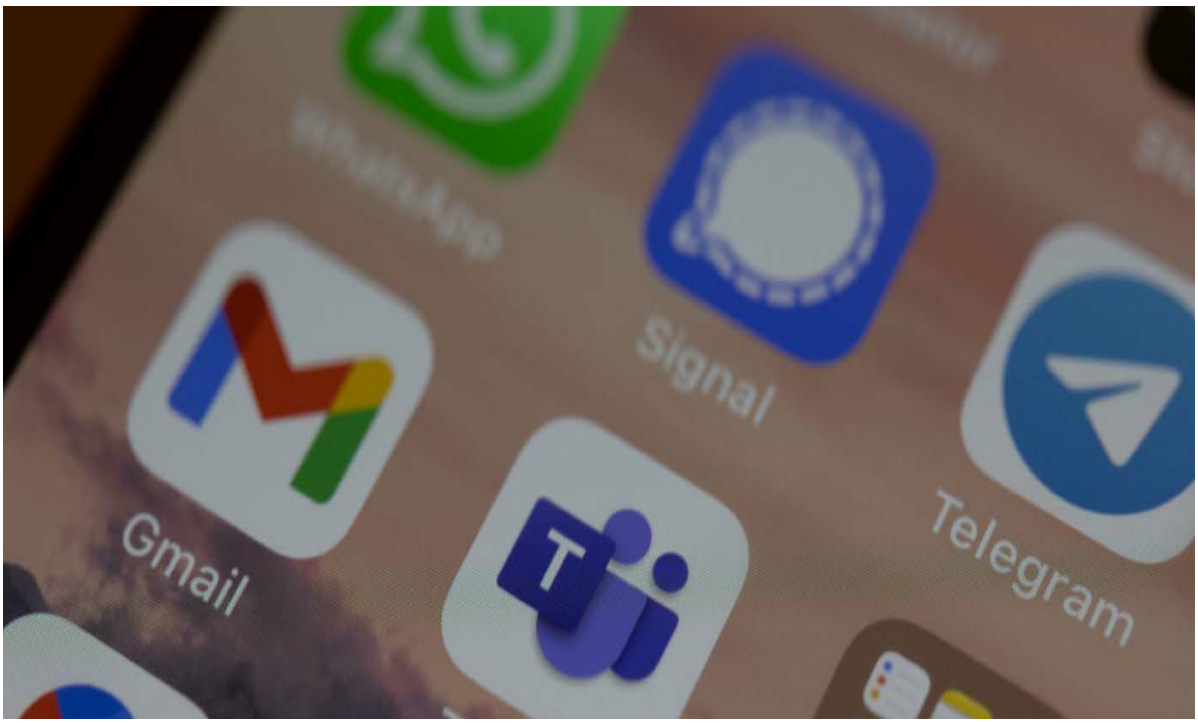
A practical guide on making the most of Microsoft Teams in your organisation

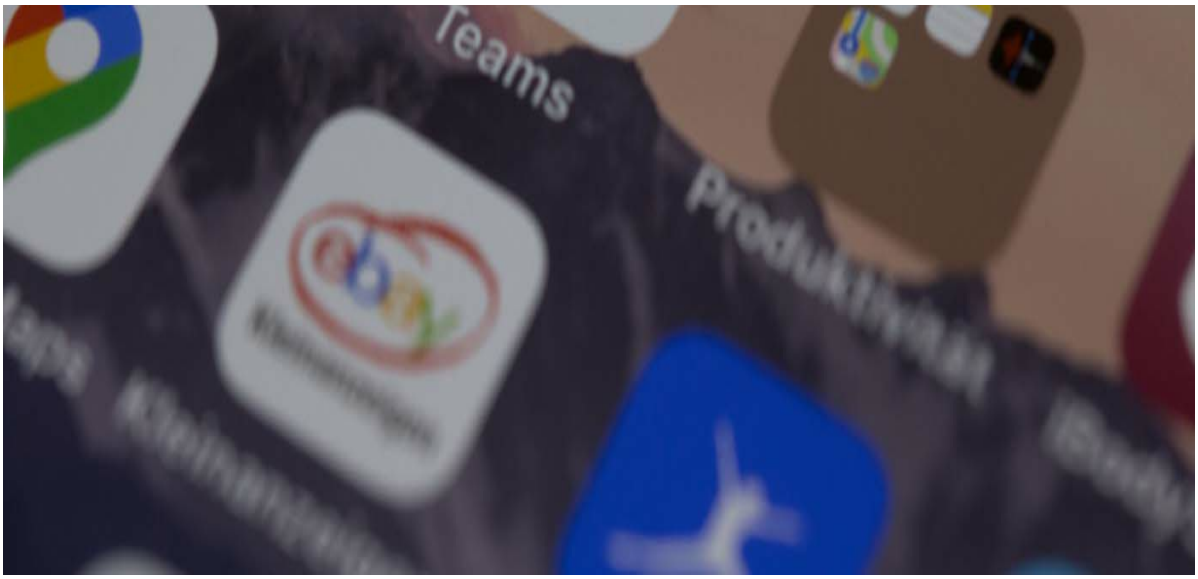
Taming Your Teams, Part 1



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(Photo by Dimitri Karastelev on Unsplash)

As many people are now aware, Microsoft Teams is an incredibly versatile tool. It has become a household name, along with Zoom, during the COVID pandemic. The fact that my parents know what they both are — by name — shows it has entered the zeitgeist.

When used, Teams seems to have been successful at hosting meetings and facilitating peer-to-peer messaging. Many clients I've spoken to have expressed how vital it has been during the sudden shift to remote working. Some of whom didn't have Teams enabled before the pandemic.

However, under the hood, there appears to be a different story going on — a tale of **missed opportunities** and **information governance nightmares.** I'm talking about the **'Team'** part of Teams.

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Putting the team in Teams

It may surprise you to learn that there is a big — if not key — part of Teams designed to provide you and your team(s) with a collaborative and interactive area to work. A feature that has resulted in my team effectively ditching email in favour of using Teams wholesale. This is the **'team'** function that is Teams' namesake (my apologies in advance for the overuse of the word 'Team' for the remainder of this article).



(Photo by Leon on Unplash)

The key benefit of the **team** functionality is in providing a structured space in which both communication and 'work' are intermingled. For example, you can bring the best elements of working from a shared folder, sprinkle in some SharePoint co-editing magic and mix it with email-like messages to provide a modern collaboration experience.

If you have ever been part of a ten email long chain, each with different copies of the same file (**project_FINAL copy(1).docx** anyone?) then the team functionality is for you.

If you've ever gotten fed up with having to read each email from your team to work out which inbox folder to put it in, then the team functionality is for you.

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Fear of the Unknown

The problem is that it represents either a blank canvas or the wild west, depending on your perspective. As a result, I've seen a variety of approaches to handling the **'team'** functionality. The spectrum has ranged from "No-one can create a Team" to "Anyone can create a Team".



(Photo by the blowup on Unsplash)

Unsurprisingly, as the pandemic began to take hold, many / most IT teams were under pressure to facilitate the need for their staff to work remotely. In doing so, many either decided to swing one way or the other regarding allowing team creation. In both cases, I've observed it was very much a "tackle it later" issue.

Fear of Missing Out

Now, as the pandemic begins — in the UK at least — to ease, we're reaching that point of 'later'. Many organisations are now starting to explore how they can best use the tools they have and capitalise on 'new ways of working' before people fall into old habits.

In discussions with my clients, there is a desire to make the most of the Teams functionality. The question is, **where to start?**



(Photo by Austin Chan on Unsplash)

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Strategy

The overall strategy to employ is quite straightforward. We need to understand **where we are, where we want to get to**, and then plan **how to get there.**

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So…Where Are We?

The aim of this stage is to gather the information that will help make our decisions for the next two parts. As such, this part should examine:

1. How Teams is being used presently & Who by
2. What systems and processes may overlap
3. What policies are in place in the organisation

How / who is using Teams at present?

The purpose of this step is to understand who is using Teams and what they are using it for. The 'who' is useful in discovering who the proponents of Teams are — and speaking to them will allow you to gain an anecdotal understanding of how Teams is used. The 'what' helps us understand how close we are to our ideal use cases (more on that later) and any potential risks (see below).

Please note, the steps below will need appropriate Admin access. It is also worth noting that there are 3rd party products and Powershell Scripts around the internet (obviously — use with extreme caution) that may help speed up some of the steps below for you.

1.1 — Individual Users

The easiest way to find this information is through the Office 365 usage reports. To access this, go to:

Admin Portal -> Reports -> Usage -> Microsoft Teams Activity -> View More -> User Activity

My recommendation would be to view data for the past **90 days**, as this gives a reasonable picture of usage. Once switched, then press the "Export" button just above the list of users (an annoying quirk of the Usage portal is the display only loads the first 100 users by default — which makes the ordering function misleading — whereas the export gives you all users).

From these figures, I would suggest you look at the following metrics:

- "**Teams Chat Message Count**" relates to how many messages they have posted in the team area of Teams.
- "**Private Chat Message Count**" relates to how many 'chat' (1-to-1, adhoc group & meeting) chat messages they have sent.

From there, understand who sits in the brackets of high / medium / low usage. Ideally, you should aim to speak to a selection of these people to understand their experiences. Do ensure you speak to those who are not using Teams frequently; this may highlight concerns, misconceptions, training issues or other hindrances that you may need to take into account.

1.2 — Team usage — Chat

To view the 'raw' data on Teams usage, go to:

Admin Portal -> (Admin Centers) -> Teams -> Analytics & reports -> Usage Reports -> View Reports

Then I advise you to choose: * Report: "**Teams Usage**" * Date Range: "**90 Days**"

Then export the result to a CSV (this is slightly hidden as an Excel logo to the top-right of the graphs).

Unlike individual users, ascertaining which teams to examine is a bit subjective. I would advise you to look through all the metrics but pay attention to:

- "**Active Users**", as you might expect this represents how many people in the organisation are interacting with this group.
- "**Reply Messages**" the higher usage of 'Reply' messages indicates (a) there is dialogue within the team (b) the team is making proper use of the chat functionality.
- "**Reactions**" same as above
- "**Meetings Organized**" this element of functionality seems to (in my experience) be underused. Therefore, high usage suggests the team is particularly advanced.

Figures to be wary of:

- "**Active Channels**" — this gives a good idea of usage, but high numbers (> 10) can indicate teams is not effective, i.e. lots of channels can dilute its benefit. Nonetheless, it might be worth investigating these teams further.
- "**Post Messages**" — high post messages likely do indicate heavy usage. However, if the rate of reply messages is low, it may indicate either (a) the messages are being posted by an automated process or (b) users are not using the message threading sufficiently — meaning a potentially less effective team.

1.3 — Team Usage — Files

Although the steps above help understand the chat usage, they don't explain the file store usage. As mentioned earlier, a key element of Microsoft Teams is its ability to mix communication and collaboration in one platform. Therefore, to gain a better understanding of this, we must swap over to the SharePoint admin centre, as such, go to:

Admin Portal -> (Admin Centers) -> SharePoint -> Sites -> Active Sites

Then, as before, export the data through the "Export" button. In the report file, you should then filter the results where "Microsoft 365 Group" is "TRUE". The metrics to review are:

- "**Storage Used**" a rudimentary indicator as to how well a team is used. It is more useful when combined with the number of files, as it may indicate large files being stored (i.e. two files, but 100 GB of storage used).
- "**Last Activity**" the last activity on the SharePoint site (file or page edited).
- "**Files Viewed or Edited**", as its' name suggests this can help indicate how many files have been viewed or edited in the time frame. A higher number indicates a more active team.
- "**Files**" as above, this is best used in conjunction with storage used and/or "Files Viewed…".

1.4 — Gaining Insight

Now we have an idea as to which individuals and teams are (and aren't) using the platform; we need to understand what they are using the platform form and how effective it has been for them. Depending on the size of your organisation, you may wish to do this as informal chats, group sessions or surveys. An idea of questions to ask might be:

- How often are you using Teams?
- What are you using Teams for?
- What devices have you used Teams on?
- What processes has Teams supplemented?
- What have you learnt?
- What training have you received?
- How have your colleagues experienced using Teams?
- What opportunities do you think Teams offers?

This exercise will help achieve three things:

1. Help inform the project team (i.e. you) on **how** Teams is being used.
2. Highlight staff who you can engage with in the future — particularly those who do **not** use Teams (possible future converts).
3. (Hopefully) Show the organisation that you are pro-actively looking to make the most of the platform and value their input.

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2. The Wider Corporate Ecosystem

No matter how multi-functional Teams may be, it must co-exist with the wider ecosystem of tools in your organisation. This is particularly acute as Teams (and Office 365 in general) will provide overlapping functionality with some of your other systems.

The ability of Office 365 and Teams to provide a rich set of tools for your business is a testament to Microsoft's hard work and ingenuity. The flip-side is that it provides a plethora of tools for your resident 'Citizen Developers'. For example, Teams might provide better functionality than your existing document management system, or its integration with Lists might supplant some of your agreed processes. While these issues are not specific to Teams, Teams' aim is — in part — to make the wider Office 365 tools readily available to your organisation.

We will look into this issue in the upcoming parts of this article. For now, however, what you should do is lay out a high-level 'map' of what other systems you have. This should cover:

- What their **purpose** is
- Which **areas** of the business use them
- Business **Owner**(s)
- **Integrations**

The aim of this exercise is to later enable us to identify opportunities and risks, i.e. areas where Teams could supplement, integrate or replace existing systems and areas where it shouldn't.

For larger multi-national organisations, you may need to focus on key systems — either global or regional as appropriate. Likewise, focus on appropriate line-of-business applications, i.e. Teams obviously isn't going to replace your server monitoring platform but might provide integration with your ticketing system.

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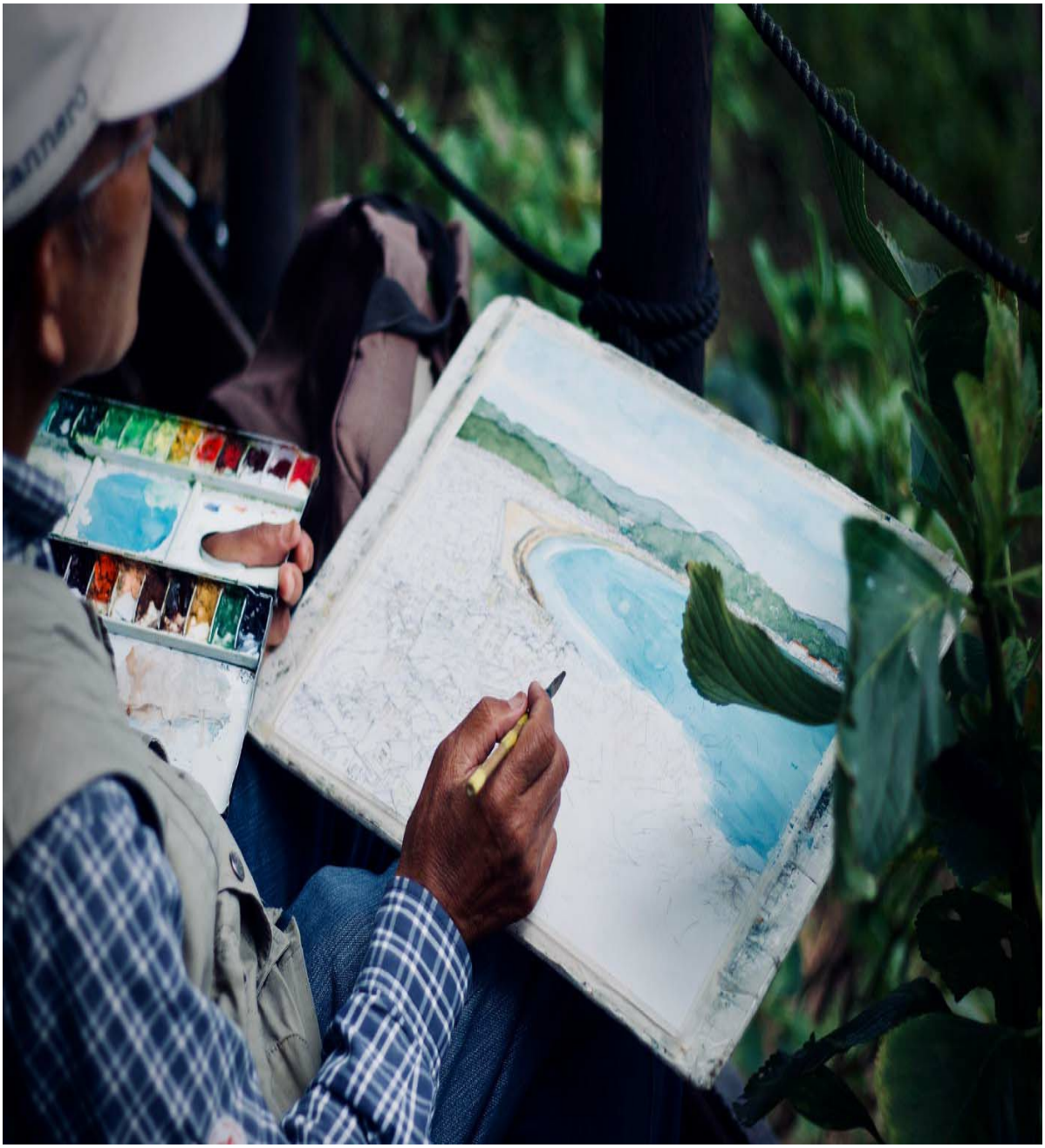
3. Policies & Processes

Teams itself and how your organisation uses it needs to adhere to your organisation's policies. These policies may relate to procedures, quality standards, workforce policies, compliance requirements, security, etc.

The aim of this exercise is to collate and understand what those policies and requirements are. This may then highlight what may or may not be possible to use Teams for, what guidance to provide or what policies may need to be adapted. Due to the complex nature of this field, you should aim to involve the appropriate people within your organisation as far as possible. Applicable examples might be:

- Your HR policy might dictate that certain communications happen over the phone — i.e. employee sickness — instead of via a Teams message.
- Your quality standards may require that all documents be kept in a particular system rather than shared via Teams.
- Your compliance requirements might restrict the forms of communication that can be held in Teams.

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(Photo by Jellek Vanooteghem on Unsplash)

Building The Picture

Hopefully, from following the above, you will be starting to form an idea of how Teams is being utilised within your organisation. In addition to this, you should find that you are starting the conversation within your organisation as to how best to use Teams and what opportunities it may provide for the business.

Knee-jerk Reaction — A Warning

If you found from your analysis that your fears had been realised — i.e. lots of non-compliant teams — then do ensure you act accordingly, but do so in a way that is:

Transparent — Explain to those affected what is happening and why.

Positive / Productive — Aim to paint a positive future picture of what Teams could be used for, explain what you are doing to reach that and (ideally) involve the relevant people to ensure they stay engaged.

The elements above are important, as you may risk alienating people who were avid users of the platform. This may subsequently impact how well they use Teams in future.

As I mentioned earlier, so far, we only understand where we are **now**. We still need to explore **where do we want to be** and **how do we get there.** In this next part of this article, I'll cover how we can understand and explore what we could leverage Teams for to accelerate our organisations.

If you'd like to learn more about taming your teams or have a chat about this guide, please don't hesitate to contact our specialist team or email christopher.grosberg@waterstons.com