



WHITEPAPER

“When To Use What” In Office 365

Providing the right kind of enterprise user guidance every organization needs.

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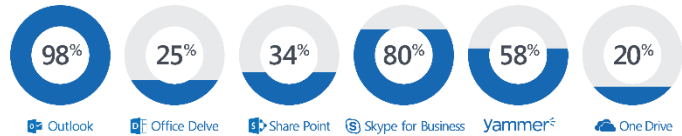


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1. INTRODUCTION

In your organization has anyone ever suggested that you only use a percentage of the functionality or a percentage of what’s possible with Microsoft Office 365? How about just one technology like Outlook? Do you think your users are utilizing most of the functionality that exists in Outlook today? What about SharePoint? Do your users leverage more than 50% of what’s available in SharePoint? Are they using it at all?



It is okay if the answer is "no, we don't use all that Office 365 can provide.", "No, not all of our users are actively using Office 365 yet.", or "No, not only do I not know all of the things you can do with Outlook or SharePoint but our users aren't aware of what they could do."

What’s **not okay** is to do nothing about it. To not have a plan for helping your users adopt, understand and leverage the full suite of Office 365 available to them. You *should* do something about it. That’s why white papers like this exist. To help you and your organization improve.

Not all of the features and functions in Office 365 are meant for daily and frequent use, but we bet you can think of some that would make a world of difference if your whole organization adopted their use. How much more value could your organization realize if users universally used 20% more of the robust document management features SharePoint provides?

Getting more people to use technology is important. Often getting people to use **more of** the technology is just as important, if not more important, then getting them to use it. Successful adoption isn’t measured in infrequent and basic use of technology, it’s measured in impact and maximizing the benefits the technology provides on an ongoing basis.



**Successful adoption is about more than just usage.*

In the experience of this whitepaper’s authors, this is a common goal for organizations. A greater need for staff to utilize technology commonly comes up when organizations evaluate their technology

investments. For each organization and individual the evaluation is different depending on the technologies they are familiar with.

However, one thing everyone can agree on: If we leveraged our technology investments further, both at the individual and organizational level, we would realize far more value from our existing technology investments. With Office 365 the additional value that can be realized is enormous.

A great question, which should often be asked, is "How do we use Office 365 better?" Unfortunately, this doesn't happen organically. When your users can't decide what technology or feature to use they use what they know, or what's easy; even if better options exist. It's up to Office 365 leaders to help users be aware of better ways of working. These leaders can help them make better decisions, more often, as they ask the question: "How do I use Office 365 better?"

This whitepaper has been written to help organizations and individuals accelerate their usage of Microsoft technologies like Office, Outlook, Exchange, Lync, Skype for Business, SharePoint, and Yammer. While some Office 365 capabilities are changing, we also provided guidance on innovative emerging capabilities, which are unique to Office 365 today, such as Office Delve and Office 365 Groups. Not only are we looking to help you accelerate adoption, but we want to provide guidance that can help users make the best choice when it comes to the technology and features they should be using.

In this whitepaper, you will find guidance, insights, and recommendations that are based on experience working with hundreds of customers in a wide variety of industries and organization sizes. While it may not answer every question, we hope that it helps you answer some of the most important ones, and equips you better to motivate and drive better usage of Office 365 in your organization.

1.1. What's New In The Latest Release?

Have you already seen this whitepaper? Check the version you had before, because we are always trying to update and improve our guidance.

What follows is an outline of each whitepaper revision and a summary of what has been added.

Version Change	What Was Added
May 2016 Update	<p>With the release of Planner for Office 365, there have been questions raised about how and when to use it. This update is meant to support answering some of those questions from a Project Management standpoint.</p> <p>The following sections were updated:</p> <ul style="list-style-type: none"> • Throughout the document, we added clarity on note callouts to make them easier to read.

	<ul style="list-style-type: none">• We highlighted some additional relevant resources throughout the document.• We added five new scenarios that focus on better understanding when to use Planner or Project Online.• Significant grammar corrections were made and re-writing of key sections to improve readability.
May 2015 Update	<p>A minor release of content updates to improve flow and to help provide more specific SharePoint guidance.</p> <p>The following section was added:</p> <ul style="list-style-type: none">• 4.4.3. Reasons For Using SharePoint Instead Of OneDrive For Business


2. ADOPTION MATTERS

Organizations adopt Microsoft Office 365 to improve their employees' productivity and ability to collaborate. When users adopt Office 365, they are better able to work anywhere and on any device. When users adopt Office 365, they can better collaborate and share in a responsible way with partners, customers or colleagues. The great thing is that as users adopt Office 365, the organization also benefits. The IT department gets the benefit of simplified compliance with archiving, in-place legal holds, information rights management to keep documents secure, and a robust enterprise-grade platform that provides advanced IT controls.

So where's the catch? Why does a whitepaper like this exist? To realize (or maximize) these enormous benefits employees must successfully adopt Office 365.

What decades of enterprise technology deployments have taught us is that for a user to successfully adopt a technology like Office 365, they need to not only understand it, the value it provides, and how to best use it; but they also need to change the way they work. Due to improvements in technology, some tasks, that have historically been done a certain way, are now inefficient. Especially when compared with how some tasks can be done far more effectively by working together. Productivity can be improved greatly by leveraging one another's experience and by working more collaboratively.

Change isn't easy. With the right planning and activities we know that we can accelerate and guide change. With the right effort, we can increase adoption of Office 365 as well as help foster the new behaviors that technology enables. In this whitepaper, we will explore why change is challenging and provide prescriptive advice and guidance on how to maximize not only your employee's adoption of Office 365 but also how to best leverage the capabilities of the platform.

 **NOTE:** We are writing another whitepaper called [Office 365 Adoption: The Definitive Guide](#) that delves deeper into suggested campaigns, approaches, methodologies and real-world adoption activities that your organization could perform to improve or ensure more meaningful adoption of Office 365. In the interim, we highly recommend visiting <http://success.Office.com> and developing an appropriate Office 365 adoption plan and strategy using the resources on that site, and you can find considerable guidance on this topic in the chapters of this free book published by WebTrends: <http://improveit.how/book> about Office 365 and SharePoint adoption.

2.1. Challenges With Enterprise Technology Adoption

While many organizations understand that Technology Adoption is a critical part of an organization's continued success, there are challenges that exist within organizations that can make it much harder for some organizations versus others. Here are five high-level reasons some organizations adopt new technologies more slowly.

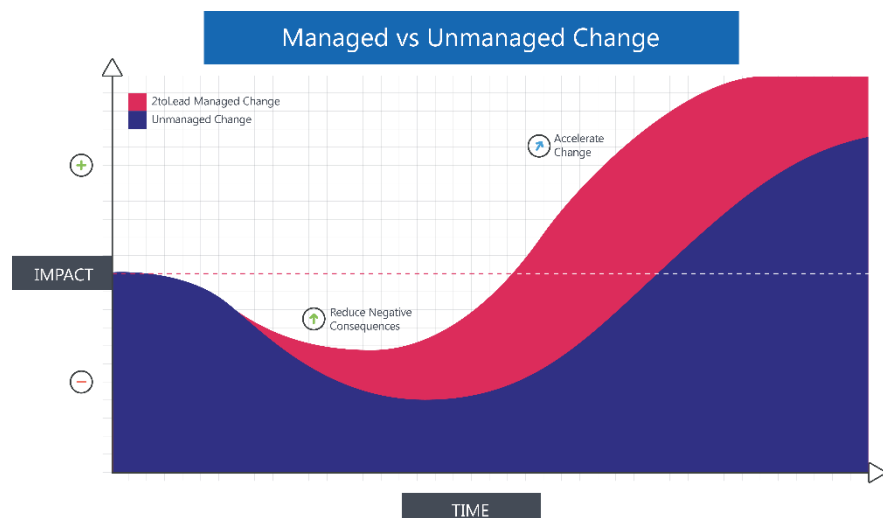
1. Slower Corporate Readiness & Rate For Change
2. Competing Technology Investments
3. New Technology Not A Core Competency Of IT
4. Culture Not Aligned With Usage Patterns & Usage Models
5. Technology Not Mature Or Relevant Enough

Consider your organization. Is there anything you can do to improve on those five common reasons? Each of them can be resolved or improved. Are improvements to these five challenges part of your enterprise technology strategy? As an example if a new technology is not a core competency of IT have you considered outsourcing the management of the technology? Many partners today provide Managed Services for Office 365 and are experts in the technology. Consider working with external experts if that is one of the things slowing down Office 365 adoption today.

2.1.1. Accelerating The Change Curve

There is always SOME loss of productivity when implementing new productivity systems that provide new ways for people to work. Some negative consequence is almost always a result of change. It also makes sense when you think about it at an individual user level, at a group level or even at an organizational level.

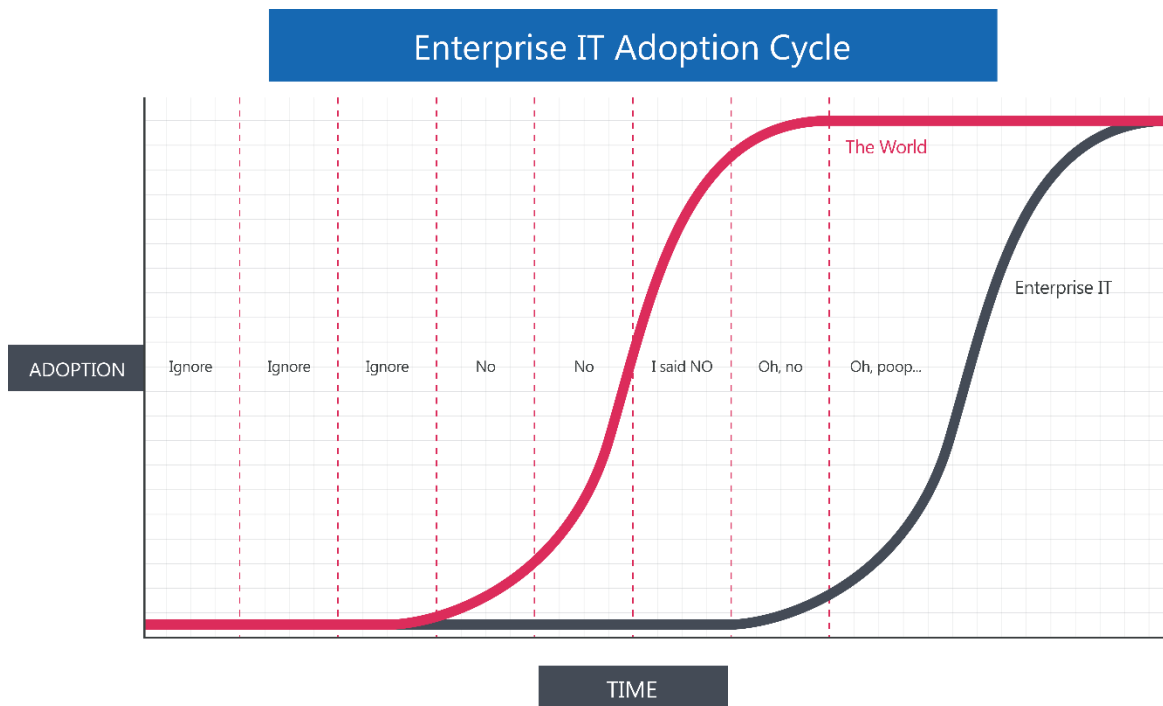
When you introduce new systems, you need time to recap the original level of productivity you had before you introduced the change. Then there is a continued productivity gain until the technology's potential has been exhausted or the organization introduces new change. There is plenty of research on this subject; it's often called the change curve. The goal is to **accelerate the change, get to the positive impact and outcomes quicker, and reduce negative consequences** that the change can have.



On the right, you can see an example of these two approaches and how managed change can lead to greater results.

It is also extremely important to not delay change simply because there is a fear of short term loss in productivity or inconvenience. If you do, you run the risk of falling behind and running legacy technology, processes and having legacy behaviors that put your organization at a competitive disadvantage.

This can be summarized in the graph below.



In other words, don't let the scrambling organization be you. Get ahead of the curve or, at a minimum, keep up with changes in the industry so that you retain the best talent and maximize the potential people bring to your organization.

3. ANSWERING THE “WHEN TO USE WHAT” QUESTION

While we know the end goal is to improve meaningful adoption of Office 365, answering the question “when to use what” is not an easy thing to do. While researching this subject, and based on our extensive experience, we knew there were a few reasons why this question would be challenging to answer.

1. **Multiple Levels:** You need to answer this question in different ways, for different organizations, and at different levels within an organization. In other words, this is multifaceted. So we need to create approaches that fit these distinct levels.
2. **Better Together:** While this may sound surprising, thinking about this question from a “versus” perspective is the wrong approach. The goal is to maximize usage of the tool in the right ways and often that means using the tools in a holistic or complementary manner, especially in a suite of technologies like Office 365.
3. **Knowing Choices In The Product Matter:** Even if you have decided on the technology, there are often choices within the product, based on certain features, which can be just as important. Do you know the right answer to questions like “whether a user should create a site, a site collection, or a library in SharePoint?” Often that kind of further understanding improves the positive outcomes of great user choices.
4. **It’s Not A One Time Question:** We often think in terms of specific instances or very clear situations. However in daily practice users don’t have this same luxury. Often they are discovering what they are trying to do as they work through a process, rather than knowing what technologies might map best to what they want to do from the start.
5. **We Need Sustained Commitment:** Remember this statement: “When your users cannot decide what technology or feature to use, they use what they know or what’s easy; even if better options exist.” When the technology changes, our understanding needs to change as well. We need to be aware of what new methods and approaches can be used, what we can do better, and how we can get more value at the individual, group and organizational level from the technology we leverage. All of this requires continual and sustainable commitment from our users.

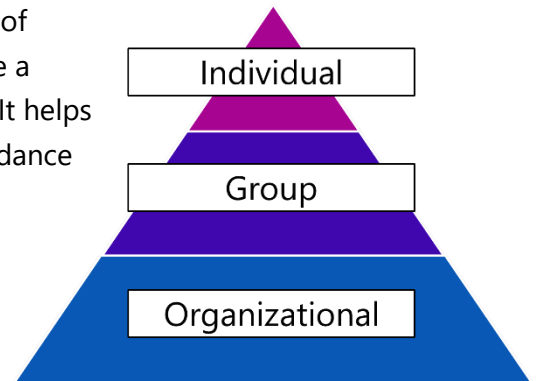
What follows in this section is more depth on each of these challenges.

3.1. “When To Use What” Needs To Be Answered At Multiple Levels

There are at least three levels where this question needs to be asked, and guidance needs to be provided.

It all starts at the organizational level. Having a clear understanding of “When to use what” at the organizational level ensures that it can be a foundation for groups, champions and individual users to leverage. It helps leaders know how to align their more targetable and actionable guidance throughout the organization.

At the organizational level, we often refer to this guidance as your Enterprise Technology Strategy. It often may even be part of a broader Enterprise Technology Roadmap.



As a pre-requisite to having a meaningful conversation around user and usage guidance, you must have an effective enterprise technology strategy. This ensures that you are taking your existing and planned enterprise IT investments into account when you provide guidance at an organizational, group and individual level.

3.1.1. Define Your Enterprise Technology Strategy

It is extremely important to identify the vision and objectives that your technology investments are meant to achieve. Just as it is important to measure their impact by these objectives and to help guide decisions based on the vision of the technology within your enterprise. Be sure to have every objective meet [SMART criteria](#) (Specific, Measurable, Achievable, Relevant, & Time-Bound). There is no room for platitudes in an enterprise strategy so also, be sure to remove ambiguous statements to keep the focus on what should be prioritized.

As an example, consider how the following technologies might be used and what your enterprise technology guidance might be based on their purpose. Note that these are only examples and that much greater detail is suggested for your enterprise.

1. Intranet Platform (SharePoint)
2. Social Collaboration Platform (Yammer)
3. Messaging & Calendaring Platform (Outlook & Exchange)

4. Communications Platform (Lync/Skype For Business)
5. Document Collaboration Platform (SharePoint & OneDrive for Business)
6. Digital Note-Taking Solution (OneNote)

Intranet Platform (SharePoint)
Purpose
Internal and private portal, knowledge management and communication solution.
Best For
Sharing information, key documents, internal news, highlights, and connecting employee experiences within the company.
Did It Replace Something?
It's important from a strategic level to understand how recently you might have replaced a legacy or alternative technology and potentially the reasons why.
Example Of High-Level Guidance
<p>As our mobile-enabled and responsively designed intranet, its primary purpose is for 1-way communication, to create awareness for initiatives, share corporate news, share success stories, and help teams find content and events with broad applicability in our organization.</p> <ul style="list-style-type: none"> • Awareness for internal ads, communication, and PR • Place to share success stories • Sharing existing content feeds • Searching for documents within our organization. • Etc.
Think Twice Before Using For
Information sharing that is meant for a single individual or a much smaller audience.

Social Collaboration Platform (Yammer)
Purpose
Corporate social networking and social collaboration solution.
Best For
Exchanging ideas, news, and thoughts. It is also great at engaging others and sparking a bi-directional conversation around a specific topic.
Did It Replace Something?
It's important from a strategic level to understand how recently you might have replaced a legacy or alternative technology and potentially the reasons why.
Example Of High-Level Guidance
Dialogue and networking are key on Yammer. It is used to share ideas, virtually brainstorm, crowdsource, and celebrate people! <ul style="list-style-type: none">• A place where employees can ask questions and exchange ideas• Internal contests• Brainstorming ideas with virtual or cross-segment teams• A place where employees can practice building online reputation with quality contributions• Recognize performance with specific names• A place where employees can network with colleagues beyond their immediate sphere of influence to develop a greater sense of belonging and connection• Etc.
Think Twice Before Using For
Extremely confidential or private information (while you can do this within Yammer safely there may be better options for you to leverage).

Messaging & Calendaring Platform (Outlook & Exchange)
Purpose
This is our corporate e-mail and calendaring solution.
Best For
Corporate email communications (both internal and external) and to manage calendars.
Did It Replace Something?
It's important from a strategic level to understand how recently you might have replaced a legacy or alternative technology and potentially the reasons why. In this case, perhaps your organization replaced Lotus Notes Mail.
Example Of High-Level Guidance
Dialogue and decision making with small groups, where information is sensitive and should not be shared broadly. Any broad communication that requires a change or action to be taken should currently live in Outlook as we transition to a more social environment. <ul style="list-style-type: none">• Requests for approval or funding for an initiative• Discussions about the direction of a project• Reminders for deadlines• Calendar management• Etc.
Think Twice Before Using For
Personal email communication.

Communications Platform (Lync/Skype For Business)
Purpose
Corporate instant messaging (real-time) and web conferencing solution.
Best For
Quick, informal discussions, screen sharing, and participating in/managing online meetings.
Did It Replace Something?
It's important from a strategic level to understand how recently you might have replaced a legacy or alternative technology and potentially the reasons why. Perhaps it replaced SameTime, Cisco, or other systems.
Example Of High-Level Guidance
A collaboration tool used for messaging, calling, and virtual meetings, Lync is our go-to tool for quick chats and virtual meetings. <ul style="list-style-type: none">• V-team syncs• IM with a colleague for a quick question• Group chats to settle a short matter• Calling when traveling to reduce cost on phones• Etc.
Think Twice Before Using For
Communications that you may need to refer to later. Keep in mind that this is stored and can be retrieved (conversation history) but it may be painful to find a specific reference in the many conversations you have.

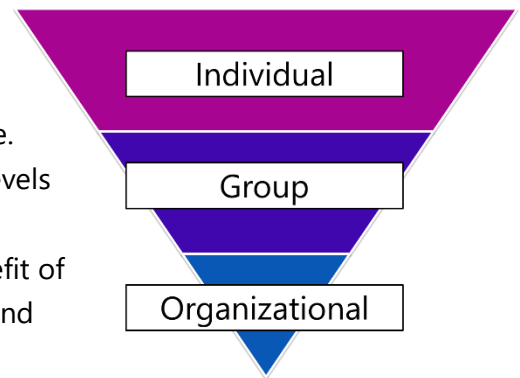
Document Collaboration Platform (SharePoint & OneDrive for Business)
Purpose
Publishing and collaboration sites, libraries and file sharing locations. Primary collaboration, document management, business process and content search platform.
Best For
Collaboration on documents & content.
Did It Replace Something?
It's important from a strategic level to understand how recently you might have replaced a legacy or alternative technology and potentially the reasons why. Perhaps it replaced shared drives, Lotus Notes, etc.
Example Of High-Level Guidance
Centralized content for collaboration and storage on documents, pictures, marketing collateral, etc. <ul style="list-style-type: none">• Partnering on a customer deck and sharing content that others can reference• Moving large files internally• Etc.
Think Twice Before Using For
Video and multimedia sharing. As we are leveraging Office 365 Video as our primary video sharing platform.

Digital Note-Taking Solution (OneNote)	
Purpose	To provide a digital note taking, a solution that helps users reduce paper-based notes and paper-based process inefficiencies as they relate to note taking.
Best For	Digital note taking, including pictures, digital ink, and keeping track of notes across devices.
Did It Replace Something?	Sometimes technology is meant not to replace an existing technology, but to replace historic processes, approaches, or methods. In this case, perhaps this is to replace written note taking and foster digital note taking which can be shared and better furthers the development of corporate IP.
Example Of High-Level Guidance	<p>With the drive to create paper-free workplaces, OneNote helps you take synchronized notes from any device. You can also use it to track tasks, projects, and share your thoughts from a meeting</p> <ul style="list-style-type: none"> • Taking notes in a meeting • Keeping track of your action items • Delegating tasks as part of a v-team
Think Twice Before Using For	Formal documentation or content that is intended to be presented in a formal way.

To be clear: the examples provided are only meant to help organizations begin formalizing high-level technology and platform guidance. It is strongly recommended that your organization investigate advanced methods for defining, not just the purpose and use cases of your enterprise technology investments, but also appropriate Governance strategies for those technologies.

3.1.2. Prioritize Effort On Individual & Group Guidance

While the organizational guidance is critical and foundational, it's important to understand that considerable effort and investment should be spent on providing individual, champion and group guidance. What we have found is that often you spend the most time on individual guidance, then group guidance and lastly organizational guidance. So when you are thinking about providing guidance at multiple levels think of the inverted triangle shown here that still is based on organizational guidance as a foundation. This has the added benefit of showing how critical it is for organizational guidance to be clear and effective since so much is based on it.



3.2. The Technology Works Better Together

One of the things you commonly hear when people bring up "when to use what" is that the organization or user needs to make a decision on the technology they will leverage to accomplish a set of tasks or to match a set of needs. When using this approach often the term versus or vs. comes up; for example, "SharePoint vs. Yammer = Decision".

The reality is that in Office 365 you use many technologies and not just one. It's not a '**versus**' discussion but an '**and**' discussion. In other words "SharePoint and Yammer = Maximum Value". In fact when this approach is taken you quickly realize it should be worded more like: "SharePoint and Yammer and OneDrive for Business and Outlook and Skype for Business and OneNote and... = Maximum Value". This is something we recognized again and again as we partnered with many organizations and customers. Whether we were tracking usage patterns and behavior or interviewing users, the 'and' approach won every time. The best results were achieved from both an adoption and impact perspective when we took an approach that embraced the 'and' benefits of how Office 365 capabilities and technology work best together, instead of the 'versus' approach of trying to select one technology over another.

Since this is such an important factor to understand let's walk through a full example or scenario of an Individual, Group and Organizational need. What if an individual, group or company wants to plan and run an event like a launch party for Office 365? What Office 365 technologies should they use?

An Illustrative Example:

First, you would leverage Outlook to connect with the other individuals who are responsible for rolling out Office 365. You would setup an Outlook appointment which will contain a Skype for Business meeting invite.

During the Skype for Business meeting, you will take notes using OneNote, which initially you might store in your OneDrive shared with the individuals on the call.

After the meeting, you work with the team to create an Office 365 Group that will be used to support the planning and preparing for the upcoming event.


You are looking for more feedback, from people outside of the Office 365 team, on the main PowerPoint presentation you intend to show during the event kickoff. This will help you better understand what they would like to see on the agenda for the Office 365 launch event. So you open up conversation view on the Launch agenda PowerPoint and share it with a few targeted Yammer Groups and champions in the organization.

You take their feedback and improve the agenda. Then you want to provide a customized Office 365 SharePoint site where users can make pre-defined Office 365 requests, like requesting a new SharePoint Site Collection through a custom list form which will be managed by SharePoint workflows.

Finally, you run the event and record the presentations. Or broadcast the launch event in HQ to other sites, utilizing Skype for Business again.

The video resulting from the great launch event, including Q&A interviews with people, is placed within Office 365 Video. The channel for the videos is linked from the SharePoint site where users will direct future Office 365 requests.

In this scenario, we outlined almost every Office 365 technology to help plan, prepare and run the event. This is a common pattern. Users use and leverage Office 365 in a multitude of ways based on their familiarity and comfort with the technology.

 **NOTE:** The point of this scenario is not to help users make a choice on when to use what. In this instance, it's to highlight that much like other scenarios listed further in this paper there may be times when it is impossible to know without more details what technology is the best fit, especially when all of them may be involved. Below is an outline as to how each Office 365 capability could be leveraged when planning, preparing for and running an event.

3.3. Knowing Choices Within The Product Matter

Understanding which technology choice in Office 365 to use is about more than just knowing which product fits the need. It often requires a deeper understanding of which features are available, how they work, and how they help.

As an example: just because a user knows that SharePoint is a good place to work on documents doesn't mean they know whether version history has been enabled on the library they are working on. Or that requiring check in and check out means that co-authoring is not possible in that library. While these may be library/list management options, which do not apply to every user, it certainly will apply to some users. Additionally, as more responsibility and capability is provided to users, they should be given an education that supports better decisions in those tools. As an example: a user who is provided a SharePoint site should understand whether they should create a site or a library in SharePoint based on their needs.

Even technologies like Outlook have capabilities and options that users can leverage, but may not understand. In many cases those capabilities might not be a good fit or better options might be available if the user understood more about the product. This is why it is not enough to simply know when to use what at an organizational level (going back to guidance being provided at multiple levels). Guidance needs to be at the group or individual level as well as the organizational level. The guidance also needs to go deeper than the product level.

3.4. It's Not A One Time Question Or Decision

Often we think of specific instances or very clear situations when a decision needs to be made. When should I use X or when should I use Y? However, in daily practice users don't have this same luxury and are often discovering what they need as the work progresses, rather than knowing what technologies might map best to what they want to do from the start.

This learning process with Office 365 is an iterative learning process: Partly because their understanding of their needs will grow as they take actions to meet their needs. Partly because their understanding of the technology and tools also grows as they take action to meet their needs. As such it's important to ensure that guidance is often provided just in time, sometimes 'just enough', and available when a user needs it. Users will use the guidance more than once, and in different ways, as their understanding of their needs and their understanding of the technology improves through iterative use.

Additionally, the goal often is not to dictate a structure of "when to use what" to users but to help them understand uses of tools and situations, where using a tool might not be as effective. This is especially effective if you have information about how they already use technology so that you can be more prescriptive or targeted with your guidance.

3.5. We Need Sustained Commitment

Remember this statement: "When your users can't decide what technology or feature to use, they use what they know, or what's easy; even if better options exist." Our goal is to help users make better decisions, but that requires them to invest effort in improving. Since it's not a one-time change but a continual change, we also need the individuals who are looking to improve to sustain that commitment to improvement.

Additionally, as the technology changes our understanding needs to change as well. We need to be aware of what new methods and approaches can be used, what we can do better, and how we can get more value at the individual, group and organizational level from the technology we leverage. This will require continual and sustained commitment from not just individuals but shared sustained commitment of groups, and over time, the entire organization.

Sustained commitment is not something that is easily achieved or maintained. We know from considerable experience that you need three things before you can get individual or shared commitment.

1. You need the individual to have an interest and awareness of the technology.
2. They need to have an understanding of the technology.
3. You need the individual to value the technology to commit to adopting it.

In a similar pattern, you need shared interest, shared understanding, and a shared sense of value to achieve shared commitment.

Below is an illustrative diagram that we often use at 2toLead when discussing this with clients.



4. WHICH TOOL WHEN

Let's re-iterate with the most critical point of the 'which tool when' debate.

This should NOT be considered a VERSUS discussion. This tool OR that tool. This should be a question of how can we best use the tools together. This tool AND that tool. We want to best use our enterprise technology investments TOGETHER for maximum results.



In other words, while we provide matrixes and comparisons between tool effectiveness for tasks throughout this document, it is not to suggest you should use one tool over another. Instead, it's to suggest that some tools do a better job; and that you should understand HOW those tools work well together or achieve the results you are looking for.

“WHICH” is LESS important than “HOW.”

Let's dig a little deeper. What is it that drives this question about what tool we should use?

There are a few basics and variables that are important for how users make decisions around Office 365 technology. When we surveyed customers they had questions or requests around “when to use what” that aligned with the following topics:

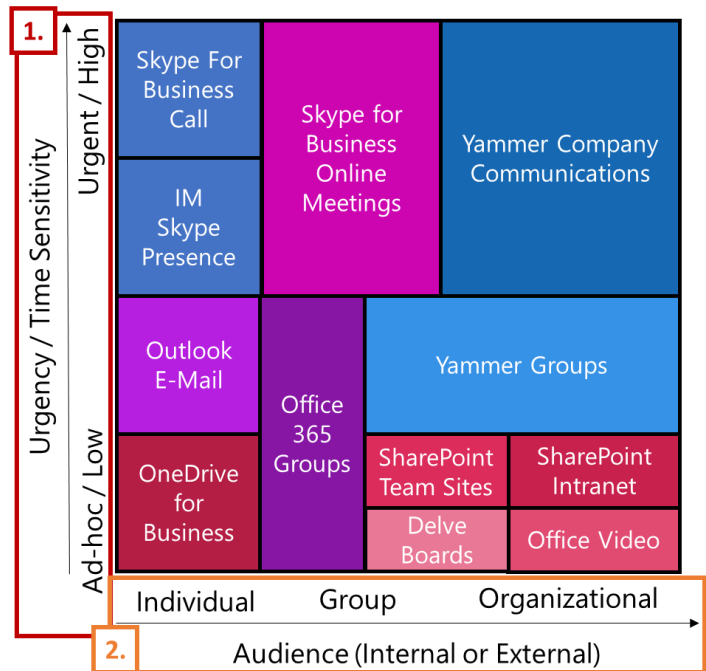
- **Variables:** There are a few variables we will outline in the next few sections, but the most important two are urgency and audience. More than most, these two variables influence which Office 365 technology might be the right solution to meet a user's need.
- **Behavior Changes:** Many books have been written about changing behavior and how technology efficiencies are often realized by changes in the behavior of users. What's important for our discussion is to understand that some behaviors' (like transparency and collaboration) are ones that provide collective benefit versus obvious personal benefit. So we need to help users navigate this gap. Encourage them to recognize and realize the collective benefits that come from modern collaboration and transparent work approaches.
- **Options In Office 365:** What are the options that exist in Office 365? Which ones are options for communication needs versus those that are better options for collaborative needs?
- **Why Do The Options Exist?** The options are there for a very good reason, and understanding their purpose can help determine whether the guidance is temporary or necessary for a longer period.
- **When Should I Use What In Specific Scenarios:** The kind of guidance that we want to get to is helping provide contextually relevant guidance based on the need and outcome the user is looking to achieve. So mapping out scenarios can help answer questions around which technologies should be used in which situations.

What follows is a deeper dive on each of the topics mentioned above.

4.1. Key Variables: Sense Of Urgency & Audience Size

An initial point of confusion that comes around “when to use what” is the timing of the action or the actions purpose. There are many different schools of thought and articles on this subject, but typically they focus on a few things: [1] how urgent is the communication/need – [2] and how private or public is the communication/need? Once you have identified those two things you can normally make a decision as to what technologies may be applicable – and which one seems like the best one to use in that circumstance.

Let us be clear – sharing and communicating are good things. What we want to ensure first and foremost is that people are sharing and communicating – regardless of where it is communicated. So we need to ensure the culture of sharing and communicating is alive and healthy in the organization. Once your users value sharing/communicating, then what people need to learn is how the technology works (without understanding you won’t get commitment) and how they can share/communicate better. This is where SharePoint, Yammer and Office 365 Groups provide more value than 1:1 and 1: few methods of communication, like traditional email and instant messages (or phone calls and Skype for Business [web conference] meetings).



So the sense of urgency [1] and audience size [2] can impact how effectively the tools we choose can meet our needs.

4.2. Additional Variables: Official Channels, Purpose & Privacy

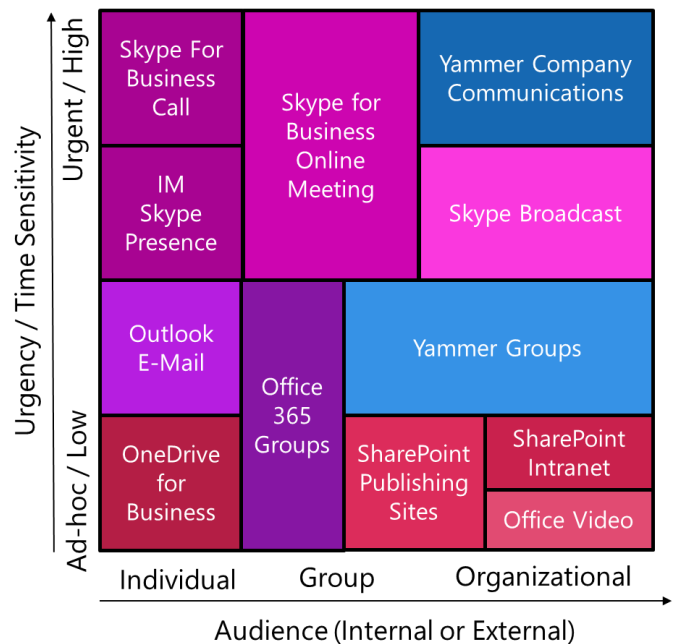
It is also important to consider additional variables.

One of them is whether this is an official communication. If it was an official communication, often collaboration can take place before the publishing of the communication, and the tools used for collaboration could be very different than the tools used for communication. It is similar to reach or audience size based context, but could result in a slightly different emphasis on technologies or appropriate places.

Keep in mind that the purpose is important. As noted with official communication, where you collaborate may be different than where you communicate. The toolsets can change regarding how you do both communication and collaboration in Office 365.

Another variable is whether the audience or collaborators include external participants. This can influence the technology leveraged based on technology readiness, organization policy, customer, partner, and contractor preferences.

Note that the Matrix shown above is different than the original matrix in slight ways. It is important to note that the matrices shown here are examples, and your organization would most likely use a very different set of matrices or should be using a 'dynamic' matrix that summarizes the behavior of users as well as the behavior you would like to see.



4.3. Behavior Changes: Transparency, Visibility & Openness

Remember that adoption matters and the goal is to help users more effectively and frequently use technology to improve results and outcomes. In particular, this is often most challenging to answer (Which Tool When) at the individual level for users. Not because the tool can't help, but because the user may need to change the way they work for it to provide the desired benefit.

Chris Slemp shared an insight around this particular challenge in [this blog post \(https://medium.com/@cslemp/which-tool-when-v3-0-42ab4262a5a2\)](https://medium.com/@cslemp/which-tool-when-v3-0-42ab4262a5a2): *For many users switching from email to social networks, this seems to be particularly tough, as the benefits are largely collective rather than personal. The essential difference is transparency, and that can produce fear as often as motivation.*

However, transparency can increase the agility of a team, and by extension, their [responsiveness to the market](#). Watch the video to hear Yammer co-founder Adam Pisoni explains how this works.

Transparency can also now be applied to most of the technology we use.

In other words, the challenge is often not a technology challenge but a change in behavior or understanding for the user. This same story could be told for a user who makes the switch from My Documents to SharePoint Team sites and OneDrive for Business sharing. Perhaps the word transparency doesn't fit your organization and instead the word visibility or shared work would fit better. The challenge remains the same: how do we educate and accelerate the change in our users understanding?

First, we can reduce fear by ensuring they know there are options. While working more collaboratively is always better that doesn't mean working completely "out loud" or transparently.

Chris Slemp also suggests the importance of flexibility in privacy and control a little later in his post.

So one way we can help accelerate the usage of Office 365 is by helping educate users on what their options are and that there are more familiar (less open or transparent) ways of working. The better way we can accelerate usage is to help educate users on what their options are based not only on the technology available to them, but the information architecture (SharePoint sites, Private Yammer Groups, etc.) leveraged in their organization (targeted).

While Yammer is the most recent poster child for transparency, it also has features that let you keep your secrets when you have to. SharePoint sites are normally only as organized and transparent as their owners create them to be, but Delve Boards allow any employee to be the curator of the collections your team needs. The default save to OneDrive for Business is to the cloud but is still private. Saving to the "Shared with Everyone" folder means you're sharing as well as saving.

Don't take our guidance in this document and assume it will apply to your users or help them make better decisions without tailoring it to how your business currently works, who your champions are and how those champions leverage Office 365 today.

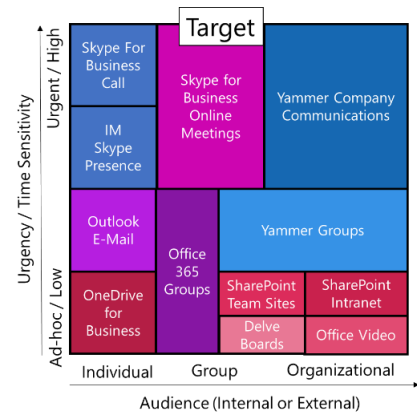
4.4. Developing Patterns Of Usage

Now we know there are many things to consider when using a matrix such as chronological relevance, audience size, internal or external impact, purpose, and significant behavioral shifts like working more openly, transparently, or realizing the collective benefit.

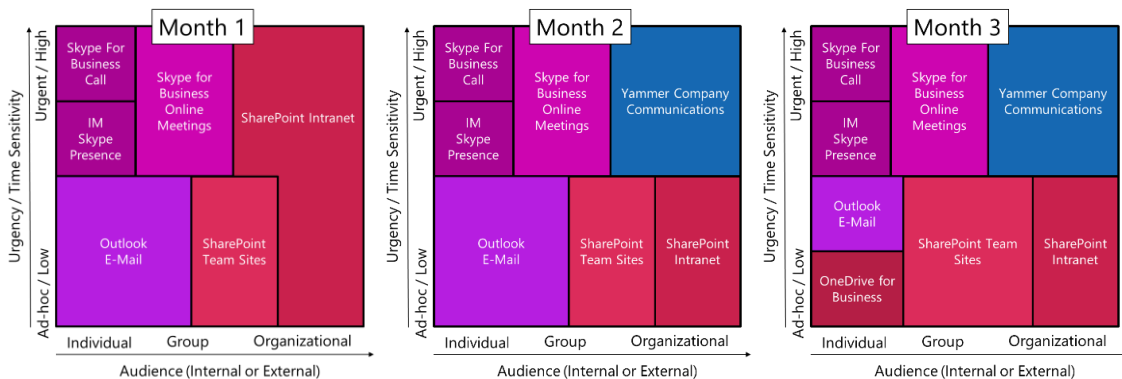
The next thing we want to do is help users mature their usage of both the tools and to try using new capabilities provided in Office 365 that they may not be as familiar with.

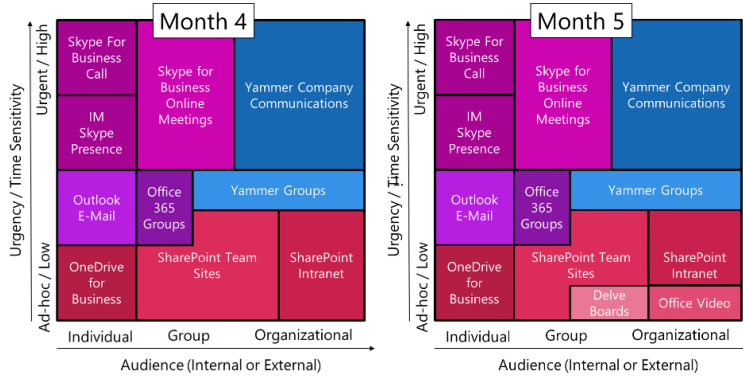
The first step for an organization is to develop a matrix for the persona or collection of users they want to target.

This can also change over time as new technologies are introduced and your organization invests, rolls out or adopts at an organizational level new approaches. Once you have identified your target, you need to determine where a group of users, a persona that represents users, or your organization currently is from an awareness and understanding perspective.



Over time we should see this current state change and as we track the change and develop based on the work we do driving awareness within the organization, providing guidance and education to improve understanding and help users value and adopt the technology. This change over time is represented in a visual example over five months below.





4.5. Options In Office 365

There are many ways to communicate and collaborate in Office 365. Depending on what technology your organization is familiar with, you may find adoption of related technologies and their approaches to be much higher than newer capabilities.

NOTE: There are additional options to ‘trigger’ the communication of a targeted group of people such as emailing the people you’ve shared a document with OneDrive for Business or SharePoint Online. While these do enable targeted group communications in Office 365, the option that is driving the communication in this scenario is Outlook or Exchange. So we have not noted all of the options that trigger communication in Office 365 as there are too many integration patterns to map effectively in a whitepaper like this.

4.5.1. What Is Office 365 Communication Options?

There are many ways to communicate with Office 365. Which one is the correct option depends on the situation and usage scenario being explored.

Here is a listing of the ways you can communicate:

Individual Options:

- Skype for Business Instant Messaging
- Outlook Email
- Yammer Private Messaging

Group Options:

- Office 365 Groups
- Distribution Lists/Distribution Groups
- Site Mailboxes

- Shared Mailboxes
- Public Folders
- Yammer Groups
- Lync/Skype for Business Meetings

Organizational Options:

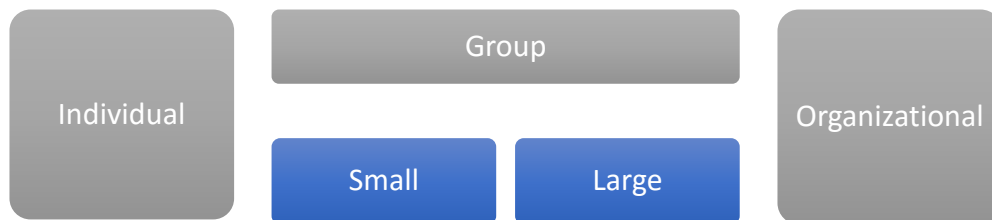
- Office 365 Groups
- Distribution Lists/Distribution Groups
- Public Folders
- Yammer Groups

4.5.2. What Are Office 365 Collaboration Options For Email Heavy Organizations?

There are many options for collaborating with Office 365. Instead of going through every capability in Office 365 that provides collaboration we thought a good way to approach this would be to provide an example of more targeted option guidance.

When each option is outlined we have tried to help communicate four collaboration attributes that should always be identified when looking at options for collaborating:

- **Who Uses This?** This notes who typically uses the option. It's important to understand who the option is intended for and its purpose.
- **Ideal Audience Size?** The ideal audience size (where we could) has been outlined. Keep in mind that audience size is an important variable, but that options often work for multiple audience sizes.



- **Ideal Time Sensitivity?** We have tried to provide a sense for what the ideal urgency would be for this option. Note that this, like audience size, can change depending on the organization and use.
- **Who Has Access?** Some options may not be automatically available to all Office 365 users. We try and communicate who has access and how this is managed.

Some organizations have a heavy amount of user adoption of email or Outlook and related email technologies.

Office 365 encourages collaboration through Groups, distribution lists (also called distribution groups), site mailboxes, shared mailboxes, and public folders. Each of these options has a different purpose, user experience, and feature set. What to use depends on what the user needs to do and which tools your organization provides.

Office 365 Groups:

A shared workspace that works across all applications in Office 365. Includes a shared inbox, calendar, and OneDrive for Business site for storing files. Users can create, find, and join Groups right from their email or calendar. New and existing users with an Exchange Online or Office 365 subscription can use Groups.

- **Who Uses This?** Users who want a collaboration workspace for their group messages, files, and calendar that is integrated with the Office 365 services they already use (Outlook Web App, OneDrive for Business).
- **Ideal Audience Size?** All Groups and at the Organizational Level
- **Ideal Time Sensitivity?** Low (Ad-Hoc)
- **Who Has Access?** Exchange Online and Office 365 users.

Additional email collaboration attributes:

- **Does It Provide A Shared Calendar?** Yes.
- **Does Email Arrive In Users Inbox?** No. Users can subscribe to a group and then forward all Group messages to their inbox.
- **Supported Clients?** Outlook 2013 (forward after subscribing), Outlook Web App, Outlook 2010 (forward after subscribing), and Outlook 2007 (forward after subscribing).

Distribution Lists/Distribution Groups

Used to distribute email messages to two or more people at the same time. Distribution groups are also known as mail-enabled distribution groups. A variant of the distribution group called the dynamic distribution group is a mail-enabled Active Directory group object used to send an email to a large and evolving group of recipients. The exact recipients are determined by filters and conditions that you specify, such as all members of a particular locale or all full-time employees.

- **Who Uses This?** Users who need to send an email to a group of recipients with a common interest or characteristic.
- **Ideal Audience Size?** Large Groups (Situationally at Organizational Level)
- **Ideal Time Sensitivity?** Highly urgent.
- **Who Has Access?** For distribution groups, members must be manually added. For dynamic distribution groups, members are added based on filtering criteria.

Additional email collaboration attributes:

- **Does It Provide A Shared Calendar?** No.
- **Does Email Arrive In Users Inbox?** Yes. An email arrives in the inbox of all distribution group members.
- **Supported Clients?** Outlook 2013, Outlook Web App, Outlook 2010, and Outlook 2007.

Site Mailboxes

Includes SharePoint Online site membership (owners and members), shared storage through an Exchange mailbox for email messages, and a SharePoint Online site to store and share documents. A site mailbox brings Exchange email and SharePoint documents together. A site mailbox also serves as a central filing cabinet for the project, providing a place to file project email and documents that can be accessed and edited only by site members. Also, site mailboxes have a specified lifecycle and are optimized to be used for projects that have set start and end dates.

- **Who Uses This?** Users who work together on a specific project with definitive start and end dates. Project documents are stored on a SharePoint Online site, and team members send and receive project-related email via the site mailbox.
- **Ideal Audience Size?** Small Groups
- **Ideal Time Sensitivity?** Low
- **Who Has Access?** Site mailbox owners and members.

Additional email collaboration attributes:

- **Does It Provide A Shared Calendar?** No.
- **Does Email Arrive In Users Inbox?**
- **Supported Clients?** Outlook 2013 and SharePoint Online.

Shared Mailboxes

A mailbox for select users to read and send email messages and share a common calendar. Shared mailboxes also can serve as a generic email address (such as info@contoso.com or sales@contoso.com) that customers can use to inquire about your company. When the Send As permission is enabled on the shared mailbox, email sent from the mailbox will use the generic address (e.g., sales@contoso.com).

- **Who Uses This?** Delegates are working on behalf of a virtual identity, such as support@contoso.com. Delegates can respond to email as that shared mailbox identity.
- **Ideal Audience Size?** Small groups.
- **Ideal Time Sensitivity?** Urgent
- **Who Has Access?** Users can be granted Full Access and/or Send As permissions. If granted Full Access permissions, users must also add the shared mailbox to their Outlook profile to access the shared mailbox.

Additional email collaboration attributes:

- **Does It Provide A Shared Calendar?** Yes.
- **Does Email Arrive In Users Inbox?** No. An email arrives in the Inbox of the shared mailbox.
- **Supported Clients?** Outlook 2013, Outlook Web App, Outlook 2010, and Outlook 2007.

Public Folders

Designed for shared access, public folders provide an easy and effective way to collect, organize, and share information with other people in your organization. Public folders organize content in a deep hierarchy that's easy to browse and always visible in the Outlook folder view. A public folder can be mail-enabled and added as a member of the distribution group. Email sent to the distribution group is automatically added to the public folder for archiving or later reference. Public folders also provide simple document sharing when you don't have a SharePoint Online subscription.

- **Who Uses This?** With the proper permissions, everyone in your organization can access and search public folders. They are ideal for email archiving or for sharing documents.
- **Ideal Audience Size?** Large groups.
- **Ideal Time Sensitivity?** Low
- **Who Has Access?** Accessible by anyone in your organization.

Additional email collaboration attributes:

- **Does It Provide A Shared Calendar?** No.
- **Does Email Arrive In Users Inbox?** No. An email arrives in the public folder.
- **Supported Clients?** Outlook 2013, Outlook Web App, Outlook 2010, and Outlook 2007.

4.5.3. What Are The Reasons For Using SharePoint Instead Of OneDrive?

Sometimes employees in organizations that have rolled out both SharePoint and OneDrive for Business get questions like "Why do we have to use both SharePoint and OneDrive for Business?" These kinds of questions suggest that there is confusion as to when and why a user might use SharePoint instead of (or with) OneDrive for Business.

The historic high-level guidance sounds something like this:

If you are doing something that is personal where the owner of the document is an individual (you), then store that in OneDrive for Business. If the owner of the document requires a team (shared ownership) put it in SharePoint (or where appropriate in an Office 365 Group).

That doesn't communicate the benefits or reasons to a user. It may not communicate why there is value in storing a document in SharePoint instead of storing a document in OneDrive for Business. While not a comprehensive outline of all the benefits here are a few that may resonate with different kinds of employees, champions, and leaders in your organization.

1. **Security & Permissions Made Easier:** SharePoint provides the ability to have shared security that can be inherited. For some users managing permissions can be extremely challenging. By using a shared site they might be able to take advantage of that site's permission, groups and membership to avoid additional permission management effort in OneDrive for Business.
2. **Workflows Are Made Possible:** SharePoint supports workflows such as approval workflows that help improve document processes, visibility and can even remind users that they need to provide feedback still.
3. **Advanced Information Management:** SharePoint provides content types, and metadata in the form of columns that can be leveraged to make documents both easier to find, and potentially be leveraged for workflows or conditional formatting/styling work.
 - a. **Shared Metadata Management:** Advanced information management capabilities are often shared in a SharePoint site, and so ownership of managing term sets or setting up the metadata may be something the user can avoid or have someone else deal with for them since it's a shared responsibility.
 - b. **Versioning & Publishing:** In many cases versioning is activated in other sites and even publishing approaches can be leveraged (minor versus major versions). While this is possible in OneDrive for Business, often users have not explored these settings.
 - c. **Content Organiser & Document IDs:** For some organizations that have advanced document management needs you may be able to upload your document to one location and based on the metadata you provide it may be automatically placed in the appropriate location. This further simplifies the experience of 'finding the place documents should be shared/stored'. Additionally, having a consistent document ID (with improvements coming in SharePoint 2016), this makes it easier to reference the document and enables other advanced management scenarios.
 - d. **Document Sets:** Document sets can be a great way of creating collections of documents based on templates (default documents). For example, if your organization has standard templates that you use for things like contracts, or if you have branded templates that you use for specific types of communication, you can upload these when you configure the document set. Now all new document sets will contain those documents. It can also help when interacting with a collection of documents with workflows or to share metadata synchronized to all documents in a set.
 - e. **External Metadata Management:** One other consideration here is that SharePoint supports external data values via business connectivity services which can make it, so a user doesn't have to manage the collection of terms or values being leveraged.

4. **Shared Views:** SharePoint provides not just metadata but multiple views which can render collections of documents based on preferred sort orders and filters. This can greatly improve navigation of document collections.
5. **Styled & Customized:** SharePoint can be branded and customized (if you choose) to provide different user experiences that can support document management.
 - a. From complex, stylized search based roll ups to simply adding conditional formatting to a libraries content based on metadata field values.
6. **Connected & Related Lists:** SharePoint can provide lists which can be connected or tied to the document metadata or serve as an alternative where appropriate for an excel sheet. Having this in the same location as related documents is a benefit that should be considered when lists apply to a related business need.
7. **Improved Compliance:** This may not be as interesting to all users, but it matters a lot for the organization.
 - a. **Auditing:** By having a structured location being audited versus an entire OneDrive for Business it can greatly simplify and improve the auditing experience for administrators.
 - b. **User Lifecycle:** Another significant consideration is that OneDrive content is tied to the user account. So when the user leaves it may be necessary to migrate files from their OneDrive to another location for future reference.

Users often also want examples. If at all possible, provide 'best of class' examples or be an example yourself with how you use OneDrive for Business and SharePoint and lead by example.

Here is a short listing of example documents that typically get stored in OneDrive for Business:

- Draft documents not yet ready for team ownership.
- My notes (where there isn't a need for shared ownership – as an example customer notes should be shared in a different place).
- My presentations (where the presentation is either personal or isn't something where you want to risk losing ownership)

And here are those that typically get stored in team-based environments like SharePoint:

- Policies, Procedures & Records
- Contracts & Proposals

- Project Plans & Status Reports
- Financial, Sales, Marketing, Client & Technical Documents

Should I save my documents to OneDrive for Business or a team site?

It's tempting to save all your documents to OneDrive for Business. The link to your OneDrive for Business library is always sitting there at the top of the page, ready for you to [upload](#) or [create a document from OneDrive for Business](#). However, you also need to think about who can and can't access the documents you save to OneDrive for Business. If a document is a collaborative effort related to a project, then saving it to a team site might be a better choice.

Save documents to OneDrive for Business when...

- You don't plan to share them.
Documents you place in OneDrive for Business are private by default, unless you place them in the **Shared with Everyone** folder. This makes OneDrive for Business your best option for draft documents or personal documents that no one else needs to see.
- You plan to [share them](#), but they have a limited scope or lifecycle.
You may sometimes work on documents that aren't related to an ongoing project, which are important mostly to you, but that you still want to share. For example, perhaps you're writing an article to appear in a blog, and you'd like to ask selected colleagues to review and edit it before you post it. In this case, you expect people to use the document once and then be done with it. People don't need any additional context information or need to know where in particular you're keeping the document. All they need is a link to the document and editing permission.
- You can't identify an existing team site where your document belongs, and you don't think the purpose of the document warrants creating a new one.

Save documents to a team site library when...

- You want team members to recognize the document as being relevant to an ongoing project.
- You want to spread ownership and permissions across a wider collection of people. If a document is important to the success of a project, it's a good idea for there to be people other than yourself who can control what happens on the site.
- You want permissions to be granted on a site basis, instead of on individual documents. If people have access to the team site, then they have access to documents stored on the site.
- Other project-related documents are already saved to the team site library, and others expect to find it there.

- You want to create a check-in workflow that assigns the document to someone else.

Moving document from OneDrive for Business to team sites

Sometimes individual documents grow in importance and become relevant to a project. When that happens, it may make sense to move them from OneDrive for Business to a team site.

Moving a document from OneDrive for Business to a team site library is a manual operation. You can either copy or cut and paste the document. The easiest way to move files between libraries is to use Explorer. In the library, click the **Library** tab, and then choose **Open with Explorer**.



4.5. Why Are There Options?

Why are there multiple ways to do something with a platform like Office 365?

There are many reasons that there is sometimes 'overlap' in one Office 365 product and another. While we can't go into every situation where there might be beneficial overlap in technology capability what we can do is summarize the three main reasons that many customers have questions around "when to use what."

4.5.1. Integrated Server Products Transitioned To Integrated Service

In many cases, the overlap is because just a few years ago many customers might only invest and buy one product but not another. There is still value for some organizations who only invest in part of Office 365's capabilities. But today more than ever, the integration and connected experiences in Office 365 encourage organizations to take a holistic strategy and deploy the full Office 365 experience versus only portions of what's possible.

4.5.2. Situational Value

Sometimes the feature provides an additional and viable option for a user who prefers a tool or experience, or for some organizations that have not yet deployed the entire Office 365 stack.

As an example sometimes customers ask why Yammer has an instant messaging capability built into it when Lync or Skype for Business is the primary way we should instant message in Office 365. One of the benefits Yammer's IM provides is that for many customers who use Yammer but who aren't yet on Office 365 this provides the ability to connect rapidly with colleagues, in a similar way to Lync/Skype for Business. In other words, it does add value but is not needed for organizations that have access to a Skype for Business alternative, which is much more robust from an IM and ad-hoc meeting perspective.

4.5.3. Faster Release & Feedback w/ Integrated Roadmap













The last major reason this overlap occurs is that sometimes customer feedback and needs demand a solution or experience that can greatly help with a problem. In these situations an initial (earlier) release of capability may be provided, so that organizations can gain immediate value from the release, and over time that release is updated to be more integrated and improved. There are very few examples of this outside of beta or test programs. There should be less over time since Microsoft is actively leveraging the Office Graph and an integrated platform base. In fact, Azure is becoming more integrated with Office 365 every day.

4.6. Scenario Recommendations Summary

When evaluating “when to use what” often additional context is required. While we cannot provide a perfect answer for every situation, we prepared a number of scenarios where we did our best to explain the reasoning for each tool, and it’s usage in the scenario (or why it wouldn’t be as good of a fit in some contexts). These are meant to help the reader understand how the technology can be recommended to users. It is suggested that clear guidance be provided to internal users via training or other methods of education and developing understanding.

What follows is a summary of the scenario recommendations outlined in the following **Scenario Examples** section.

Scenarios								
Finding Someone With A Certain Expertise								
Ask Something, Don't Know Whom To Ask								
Do A Brainstorming Activity With My Team								
Where Should Meeting Notes Be Captured, Stored & Shared?								
Where Should I Share Video?								
Where Should I Share Photos?								
Have A Real Time Chat With A Colleague								
Where Should I Put & Share Documents?								
Have A Question Related To A Document?								
Invite A Colleague To Lunch								
Provide A Note Of Congratulations/Praise								
Make An Organizational Announcement								
Remind The Team Of An Important Deadline								

Scenario												
Track Project Tasks					◐	◐			●	●	●	●
Track Project Logs					◐	◐			◐		●	●
Store and Share Project Documents							◐	◐				●
Searching for Content		●	◐	◐		◐		◐	◐			●
Ask a Question	○			●		○		◐				◐

It is important to review the scenario descriptions in the following section to provide context as to why some options were recommended over others.

4.7. Scenario Examples

Broken out are thirteen scenario explanations with Office 365 “When to use what” guidance. These scenarios were selected based on feedback from many customers (and were carefully selected) but are not a complete representation of the many ways organizations can and do leverage Office 365 today. Be sure to review them as examples to help you better understand situations where Office 365 capability can be of benefit. These examples are not representative of all you can do with Office 365 and are not always applicable, as many could be different based on the situation.

4.7.1. I Need To Find Someone With A Certain Expertise

In regular business activities often we need to find someone who has expertise we are looking for. Perhaps we have a question for them, need help with a project or understanding a concept, and so we look to Office 365 to help us find someone who can help.

How Might Users Accomplish This Today In Office 365?

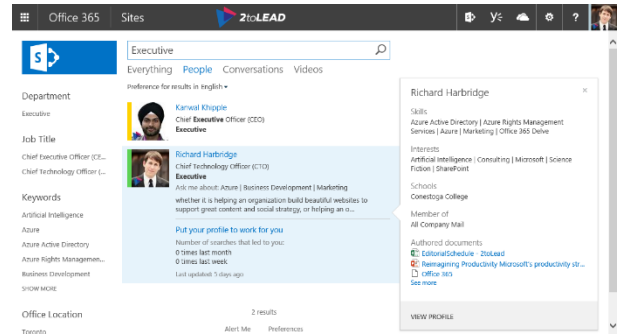
Scenario	S	Y	S	Cloud	D	O	People	V
Finding Someone With A Certain Expertise	☐	●	●	☐	☐	☐	☐	☐

When To Use...

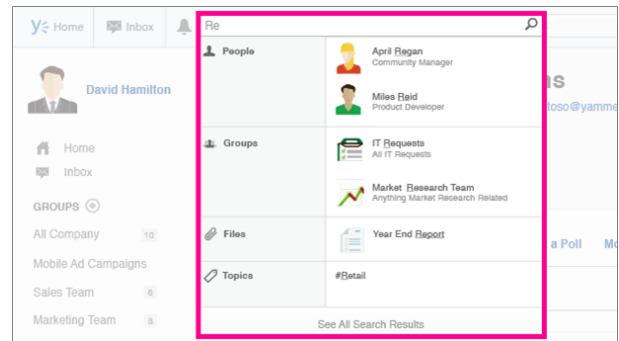
There are a number of ways you can leverage Office 365 to assist in finding someone with a certain expertise. The three best ways to find someone with a certain expertise are to search using Office Delve, SharePoint Search or within Yammer.

Delve can enable you to find people who fit the expertise you are searching for based on the content they produce. You would do this by searching for the subject and using the context of documents, who authored them, and who last modified them to suggest who might have the expertise you are looking for. As profile information and more experiences are brought to Delve be sure to evaluate whether Delve is a stronger fit for this scenario over time.

With SharePoint we can do extensive searching, not just for people based on the content they produce (indirectly by finding the content and looking at the author, where it is stored, or who last modified it like in Delve), but we can also search for people directly based on information they have provided in their profile. This is an extremely strong option, and a good choice for most situations, especially since the SharePoint search experience provides refiners that can quickly enable someone to narrow their search based on a department or keywords that might be related to the search.



Finally searching within Yammer for organizations with a robust social collaboration and enterprise presence can help you find people based on their contributions to conversations, based on the expertise you are looking for or based on their profile information.



When Not To Use...

While possible to find the right person via email, this method is not very efficient because it's confined to who you know and restricted by the information you have stored within your individual email inbox. Similar to email, instant messaging is also not as efficient because you are limited to finding expertise among the people you know. While you could find an expert based on their group contributions, this is also not the best way to identify and discover experts.

4.7.2. Want To Ask Something, But Don't Know Whom To Direct My Question

We often have questions that come up, and we aren't even sure who can answer our question. When faced with situations like these what are our options? How do we get the answer(s) we need? Well, Office 365 can help us.

How Might Users Accomplish This Today In Office 365?



Ask Something, Don't Know Whom To Ask	○	●	◐			◑	◒	
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When To Use...

There are a few places you might post your question when you aren't sure whom to ask.

The most popular option is to post your question on Yammer. Yammer allows employees to cast a wider net and gives them an ability to reach a broader audience. Yammer provides access to a diverse range of knowledge and expertise within the organization, which helps to increase your chances of getting an answer to your question. Keep in mind that you should still try and target a group within Yammer that will help categorize or increase the likelihood of an expert being able to answer your question.

NOTE: Remember to take frequently asked questions and promote the official answers in documents you can refer people to. You can find frequent questions easily within your group if you are a community or group manager, or you can set up a process to highlight frequent questions internally to better improve knowledge re-use, official answers, or organizational responsiveness. Some organizations even create 'Office of' or Official accounts that other users can log into to provide answers – so when someone asks a question to the HR department while people can answer the official HR account or person can respond and either validate a specific answer, or highlight a more official answer and perhaps refer to an updated FAQ

In a similar way, there may be structured areas that match the topic of your question that are moderated or have high levels of engagement from experts that might be able to help. These can often be found in Office 365 Groups or within SharePoint Community or Team Sites, especially in discussion boards. In fact in some instances your question may have already be posted so be sure to do a few searches before you post to potentially get an even faster answer (or to add more context to your question as to what you have already looked at but wasn't applicable or the kind of answer you were looking for).

When Not To Use...

While possible to get your question answered via email, employees are limited to people you know in your network. Eventually, your network might be able to lead you to someone that can answer your question, but email has been less efficient at this type of activity. Imagine if you're a new employee that has a question. How would you even know whom to start with? Similarly, from an IM or Skype for









Business perspective, your ability to get your question answered will be limited to the people you know in your network.

Keep in mind that once you find a person you think can help there is nothing stopping you from reaching out via email or IM. But that if that is where the question is answered no one else shares the collective benefit of the answer in the future. This is the main reason we want to encourage participation in questions in Yammer, Office 365 Groups or SharePoint over 1:1 or personal communication approaches.

4.7.3. I Want/Need To Do A Brainstorming Activity With My Team

Brainstorming can be a highly effective method for generating ideas. Office 365 has a number of capabilities that can help a user who is trying to brainstorm with their team or a collection of individuals.

How Might Users Accomplish This Today In Office 365?

Scenario								
Do A Brainstorming Activity With My Team	●	●	●	●		●	●	

When To Use...

There are a number of ways you can leverage Office 365 to assist in helping your team brainstorm. However, there isn't a clear first choice. Is the act of brainstorming time sensitive? Or can this be done over days, weeks or even months?

When you think about the act of brainstorming, this might be done well with a OneNote document that has been shared with a team that is writing, drawing and providing ideas. Similarly, the whiteboard feature in Skype for Business and the audio/video capabilities in Skype for Business could be a great boon. These are relatively high-urgency situations of brainstorming. Perhaps a Visio diagram (there are brainstorming templates that can help create shared understanding and organize brainstorming sessions) could be leveraged and stored/shared from OneDrive for Business, SharePoint, or an Office 365 Group.

If it's something that can be determined over time instead of in a single session, then there are other great options available. Yammer works well for this because of the conversational flow it provides. People who are traditionally less vocal can contribute where those that are more vocal in person may

have previously overpowered them. Using Yammer also allows for people to contribute asynchronously (at the same time without necessarily waiting for a response). Similarly, Office 365 Groups or employees leveraging a SharePoint discussion board could contribute over time.

When Not To Use...

Brainstorming via email can be done, but it can also become unwieldy and difficult to track very quickly. Consider if one person misses one person's contribution - now the entire email thread is out of sync and becomes difficult to follow.

Brainstorming via IM might work well when you have a finite group of people together at the same time. Storing and making these ideas available for others to build upon is challenging because the ideas generated are trapped within a single IM session. But this can be alleviated with OneDrive for Business, SharePoint or an Office 365 Group being the place where the outcomes of the brainstorming session are shared (Visio, OneNote, or otherwise).

4.7.4. Where Should I Capture, Store And Share Meeting Notes?

We all sit in meetings where many people often like to take notes to help clarify action items, help remember what was discussed, or to help visually create a shared understanding of what has already been discussed when shared in the meeting itself.

How Might Users Accomplish This Today In Office 365?

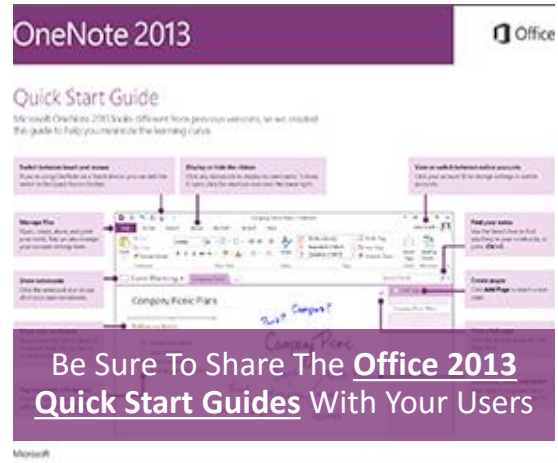
Scenario	S	Y	S	Cloud	D	O	People	V
Where Should Meeting Notes Be Captured, Stored & Shared?	●	●	●	●		●	●	

When To Use...

This is a challenging question to answer with one technology option as it involves multiple options in an optimal scenario.

What would you like to do with these notes? Are they for just your benefit or would you like the notes to be shared with others? Depending on your answer where you store the notes may be different places.

However let's walk through the key technology involved that would be recommended. First, you would almost certainly want to take notes using the OneNote Notebook. The good news is that you can create the OneNote Notebook for yourself privately in your OneDrive for Business. Or you can create a shared Notebook for the team or group and store it in a SharePoint team site or Office 365 Group. Using OneNote Notebook gives you a number of benefits over using other methods for note taking:



- Notes are available on any device.
- OneNote works great with touch, stylus and has flexible formatting.
- Familiar like a notebook, but flexible organization.
- Easily capture screenshots, embed images and then search them later (since images are indexed).
- Create subpages for needed note organization.
- The entire OneNote is searchable, and it's also indexed by Office 365 (so you can find it easily later, or so other team mates can find it easier).
- You can also connect notes to Outlook Meeting Appointments (or to Skype for Business meetings. Making it easier for people to find, access, and contribute to the notes).
- If this is a shared Notebook, multiple authors can edit in real-time.

OneNote is the recommended way but is not the only way.

The Notes functionality in Yammer could be ideal for creating meeting agendas and capturing live meeting notes. Notes allow for multiple contributors at one time. Yammer's search capability makes surfacing your meeting activity easy to reference later, plus you can easily view and retrieve previous versions. Additionally, like OneNote, multiple authors can edit in real-time. You can also @mention people and get notified when a note changes. In the SharePoint or OneNote approach highlighted above you can also get alerts of changes. But due to the frequency of changes, this is rarely advised. Instead, you should use the next unread or recent edits options.

NOTE: When working with multiple authors OneNote also shows updates in BOLD format if you have not read or seen it. There is also a "Next Unread" button and a "Recent Edits" option that are often invaluable for keeping track of changes.

From a storage standpoint, it makes the most sense to store shared meeting notes in a team or group environment rather than a personal environment like OneDrive for Business. OneDrive for Business is a great place for personal notes that you own. However, it makes sense to use SharePoint and Office 365 Groups as the primary locations for storing and sharing OneNote collections of associated meeting notes where there is a sense of shared ownership. Since OneDrive for Business is the perfect place for personal meeting notes you will see it has been highlighted as a strong option above. But keep in mind the importance of knowing who you are sharing it with and whether already shared spaces in SharePoint team sites or Office 365 Groups might be a better fit.

When Not To Use...

Taking meeting notes in an email and mailing them to meeting participants is also a common practice. This method, however, makes it difficult to make changes to those meeting notes. Unless what is shared isn't the notes themselves but a link or reference to the notes in Yammer or SharePoint, where they can be updated by participants unable to make the meeting or extended team members.

Taking meeting notes via IM is entirely inefficient because the information doesn't become discoverable in any way and it also neglects anyone that may not have been able to attend the meeting in person. That said notes can be taken collaboratively in a meeting notebook which also ensures they are stored somewhere after and can be easily shared. Additionally, we can collaboratively take notes in a visible way using the Skype for Business whiteboard and then copy the results of our meetings notes into OneNote for future reference.

4.7.5. Where Should I Share Video?

In a modern enterprise, there are many situations where the sharing video could greatly help communicate or share information. If we have video content where should we share it with Office 365?

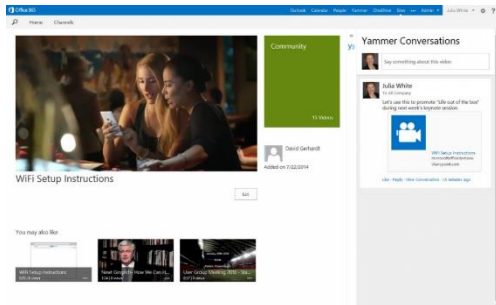
How Might Users Accomplish This Today In Office 365?

Scenario	S	Y	S	C	D	O	G	V
Where Should I Share Video?	○	◐	◑	◒	◓	○	◐	●

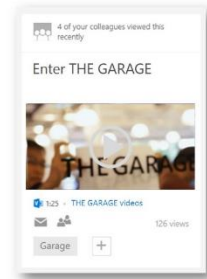
When To Use...

Office 365 Video portals were built for this specific purpose within Office 365. It is the optimal place to store and share video content. Office 365 Video provides organizations with a secure, company-wide destination for posting, sharing and discovering video content.

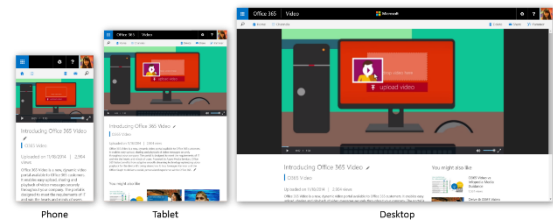
When videos are posted in Office 365 Video they are easily searchable via enterprise search, with a dedicated search experience in the video portal already scoped to show only video results. All uploaded videos are discoverable in Office Delve (similar to documents, videos are automatically fed into the Office Graph).



Every video player page has easy access to share directly into Yammer via inline conversations. Simply type in your message, add a group or individual to send to and click **Post**. The conversation stays with the video in the video portal, and can be accessed from the main Yammer user interface or on devices through the various Yammer apps.



People can view and share videos within Office 365 on any device. They can easily navigate the homepage and channels to find and view content, and even upload new videos from their device.



When Not To Use...

Beyond being used for inline conversations, Yammer also allows you to share videos easily with your Group or an entire organization. An added value that Yammer offers is the ability to start a conversation around the file. However, with Office 365 Video being such a compelling, secure and capable place to share and store video files, it is recommended that video content is stored in Office 365 Video and only external videos or videos already stored in other locations be referenced in Yammer.

Users can upload and share videos with their team in SharePoint sites. SharePoint team sites aren't as good as Office 365 Video at presenting media since it's not designed with that core purpose. Referencing external videos can be done in Office 365 Groups, but again videos should be stored in Office 365 Video if they are in the organization itself.

Email is not an effective means of socializing video files as mail servers have files size limits. Additionally, spam filters may block content that is shared. You can use this to share external video references. But from a discoverability, it may not be as useful for collective benefit as SharePoint, Office 365 Groups, or Yammer.

While Skype for Business can have PowerPoint files with embedded videos display to meeting participants effectively, it is better to store video assets when possible in Office 365 Video and not within PowerPoint presentations. Keep in mind that there are broadcast and live stream capabilities that

may make more sense as a strong use case for video under Skype for Business as the roll out continues in 2015 and beyond.

Bonus! When To Use Video & When Not To Use Video Guidance

With Office 365 Video and more organizations leveraging Video every day be sure to read our article: [When To Use Video & When Not To Use Video.](#)

4.7.6. Where Should I Share Photos?

A picture is worth a thousand words. In many organizations, photos are taken at company events, are a great way to communicate something at a lower cost than video, and can create opportunities for engagement or rapid understanding. Where should we share them with Office 365?

How Might Users Accomplish This Today In Office 365?

Scenario	S	Y	S	C	D	O	P	V
Where Should I Share Photos?	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

When To Use...

Yammer allows you to share photos easily with your Group or (where appropriate) the entire organization. Photos show up inline right in the user's feed. An added value that Yammer offers is the ability to start a conversation around the file. Uploading photos from the mobile app is simple and enables you to share relevant content while in the field.

Users can upload and share photos with their team in SharePoint sites. SharePoint provides a few ways to visualize photos beyond just storing them in a location and sharing them. So it is an effective way to share photos in a visually attractive way.

Additionally, users can use OneDrive apps which blend both their personal OneDrive storage with that of OneDrive for Business. This can make it easier to upload and share photos stored on their mobile devices, but Yammer or SharePoint would make a better-shared repository for photos to be shared with a broader team or group.

When Not To Use...

Email is not an effective means of socializing photo files as mail servers have files size limits. Additionally, spam filters may block content that is shared.

In a Skype for Business meeting or IM you could share the photo files, but this wouldn't be an effective way to share photos.

Office 365 Groups could be used to share photos. It works great, but the experience doesn't provide as many ways to visualize photos as SharePoint does. While it can be a way to share a collection of photos for users to download or reference, it may not be the best choice depending on your individual, group or organizational need.

4.7.7. What's The Best Way To Have A Real Time Chat With A Colleague?

Often in our day to day work we need an efficient way to connect with our contacts and colleagues in real time and on a moment's notice.

How Might Users Accomplish This Today In Office 365?

Scenario	S	Y	S	Cloud	D	O	People	V
Have A Real Time Chat With A Colleague	●	◐				○	◐	

When To Use...

Skype for Business (Lync) instant messaging (IM) is the most popular way in Office 365 to connect with your contacts in real time and on a moment's notice. Less formal than email, faster than a phone call—IM is tough to beat for speed and ease of use. You can send an instant message from anywhere in Skype for Business (Lync) where you see a contact.

Just check that the vertical bar on the left side of the picture is green, and the "available" label is displayed, indicating the contact is ready for contact.



The benefit too is that from any IM conversation you can graduate it to a Skype for Business meeting between you two by sharing your video or audio right from the IM discussion.

While Skype for Business is the most popular way to connect with colleagues in real-time, there are near-real time options that exist within both Yammer and Office 365 Groups that are worth noting. Note that this isn't truly in 'real-time' but both Office 365 Groups and Yammer Group discussions can happen in near-real time, with participants responding to one another rapidly. This is more preferable to Outlook where discussions are locked in emails, and the format doesn't work as well for rapid conversation. The benefit of Yammer or Office 365 Groups in this context is that if there is collective

insight or value that can be obtained from the conversation this will be available to other people who have access or rights to the Group or topic where the discussion took place.

When Not To Use...









While in some cases it may be possible, email is not intended to be a real-time communication tool.

Yammer's Online Now is designed for instant, real-time collaboration. Conversations are archived as a Private Message in the Inbox and are searchable for later reference. However if you are actively using Skype for Business, this is a more robust platform for IM discussions than Yammer's Online Now capability. That doesn't mean a user shouldn't use it if they prefer the tool or spend their time on Yammer. But if they have the rights to use Skype for Business it would be the preferred tool from an efficiency and capability standpoint.

4.7.8. Where Should I Put & Share Documents?

During our daily work, we create documents or receive documents from partners and customers. When we have a new document where should we store it?

How Might Users Accomplish This Today In Office 365?


Scenario								
Where Should I Put & Share Documents?								

When To Use...

First, it may be important to ask who the file is intended for. If it's just for you, then OneDrive for Business will be the optimal place. If you are interested in sharing the file with others, then while OneDrive for Business can provide this option, you may be better serviced by a SharePoint Site library or an Office 365 Group.

SharePoint has robust administrative and security controls for document storage and is a true document management system. Files may be checked in/out, and you can incorporate team collaboration for related content. SharePoint is also efficient at assigning workflow around documents and provides metadata capabilities so you can track the stage of documents, or take action based on the state or conditions a document meets. Office 365 Groups also provide some great capabilities for both storing and sharing documents as well as taking documents stored in SharePoint or OneDrive for Business and 'sharing with' the Group. In the latter scenario, the documents are put or stored in the other locations but shared in with the Office 365 Group to improve collaboration.

OneDrive for Business and SharePoint sites can be accessed on any computer or mobile device, and both have the ability to share a file. But a SharePoint site's library might be a better location as it inherits, or may be assigned permissions (and shared with people), based on where it's stored versus the extra sharing step required in OneDrive for Business sites (unless the user has created folder structures). Both OneDrive for Business and SharePoint Libraries provide version control and make the document searchable for future reference or discovery. Both also enable the ability to edit online, and co-authoring can also be an option.

 **NOTE:** Should you save files to OneDrive for Business or a Team Site? In the "[set up your team site in Office 365](#)" guidance a few key considerations are outlined and are a good representation of the reasons to store documents in OneDrive or a Team Site.

SAVE DOCUMENTS TO ONEDRIVE FOR BUSINESS WHEN:

- *You don't plan to share them.*
- *You plan to share them, but they have a limited scope or lifecycle.*
- *You can't identify an existing site where your document belongs, and you don't think the purpose of the document warrants creating a new site.*

SAVE DOCUMENTS TO A SHAREPOINT TEAM SITE WHEN:

- *You want team members to recognize the document as being relevant to an ongoing project.*
- *You want to spread ownership and permissions across a wider collection of people.*
- *You want permissions to be granted on a site basis, instead of on individual documents.*
- *Other project-related documents are already saved to the team site library, and others expect to find it there.*
- *You want to create a check-in workflow that assigns the document to someone else.*

While SharePoint, Office 365 Groups, and OneDrive are a better place for your files, it is possible to store documents and share them in Yammer's document repository. But more importantly, Yammer gives you the capability to link to SharePoint documents (so you can use the conversations view in OneDrive or a SharePoint library and get the other benefits of Yammer without storing the document in Yammer itself). By sharing the document uploaded to OneDrive for Business or

SharePoint in Yammer you can have thread enabled conversations about it and @mention users for feedback. This is also something that has been incorporated into the Delve experience making it easier for many colleagues to share insight, feedback, and context quickly on documents you share.

If the document is stored in Yammer users, have the ability to lock content by marking documents as Official. Marking files as Official causes these files to surface to the top of search results.

Keep in mind that Delve Boards can also be a great way to group and share related documents. You can, for example, create a board to collect all documents that relate to a subject for your team. Boards make it easy to collect and discover content, and they are easy to share with others, too.

When Not To Use...

Typically, unless you aren't using SharePoint, Office 365 Groups or OneDrive for Business, it is better to store documents in those repositories and share them into Yammer via document conversations versus storing them within Yammer.

Email fails at document management. There is no version control, and changes are nearly impossible to track. Given that most users' email inboxes have storage limits using email for document storage is entirely inefficient. The good news is that there are ways to share a link to a document that is stored in SharePoint, an Office 365 Group or OneDrive instead of emailing the document itself. This is in Outlook 2016, and the capability is available in Outlook Online (the web interface) today. So you can still 'email' to share content, but get the benefits SharePoint, Office 365 Groups and OneDrive for Business provide.

One legacy reason people shared documents by email was that they couldn't share them with external users as easily in SharePoint or OneDrive for Business. But in Office 365 this should be easy for a user to do (assuming the organization has enabled it), and so it is no longer necessary to store the document in the email that is sent.

IM clients do not store documents natively and sharing as attachments in a meeting is not scalable or efficient, unless it's for ad-hoc or meeting specific reasons. The good news is that once again it's easy to share a link to the document and so that is the recommended approach.

4.7.9. What If I Have A Question Related To A Document?

Sometimes we find or discover documents via SharePoint search, Delve, a shared link, or just by navigating around inside of Office 365. When we find a document and have a question about it what tool(s) should we use?

How Might Users Accomplish This Today In Office 365?

Scenario	S	Y	S	Cloud	D	O	People	V
Have A Question Related To A Document?	☐	●	●	●	☐	☐	●	☐

When To Use...

Before you click the presence icon of the person, who last modified it, be sure to check the document conversations view to see if anyone else has asked the same question about the document.

Yammer provides users the ability to have a conversation around all types of content including Files, Notes, and Open Graph object pages. This capability becomes valuable because all the discussion related to that piece of content is stored and followed in one place.

Conversations around content in SharePoint are often disjointed and not necessarily connected to the content itself. SharePoint as a standalone product does not have robust social capabilities. The Yammer web part bridges this by allowing users to share SharePoint files into Yammer so that users can collaborate around it.

When Not To Use...

Users can have a conversation, but email thread length can be a limiting factor. Additionally, as more users add content, the thread can become disjointed and difficult to piece together. While having a conversation about a document is possible via IM, having a conversation tied to a document is not possible. Using IM for this purpose might be okay for 1 to a few people, but it also requires all collaborators to be available at the time of the chat.

4.7.10. I Would Like To Invite A Colleague To Lunch

There are some scenarios in our daily work life that are a 1:1 or 1: few discussion, that has low to no value for a broader audience or chronological relevancy beyond the day of the discussion. For scenarios like this Office 365 has capabilities that can help.

How Might Users Accomplish This Today In Office 365?

Scenario	S	Y	S	Cloud	D	O	People	V
Invite A Colleague To Lunch	●	☐	☐	☐	☐	☐	●	☐

When To Use...

This is a great scenario for Outlook today. Email’s calendaring ability makes this the best option. Invite your colleague to lunch by sending them a calendar appointment.

For more impromptu lunch plans, consider reaching out to your colleague via IM. IM’s presence indicator gives you some sense of whether they are available for a quick bite.

When Not To Use...

This type of interaction isn’t meant for a broad audience. You could send your colleague a private message on Yammer inviting them to lunch, but this is not optimal. Similarly, Office 365 Groups could enable you to message an individual user or small collection. But since it is not part of ongoing work (unless this is one of many regularly scheduled lunches) it is better to use the Outlook or Skype for Business mediums for more immediate results.

4.7.11. Provide A Note Of Congratulations/Praise

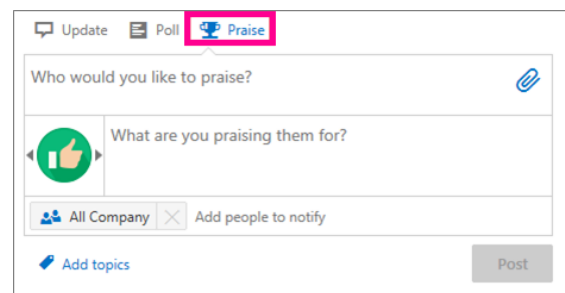
Praising and celebrating great work improves employee engagement and helps connect employees further. There are a few ways an employee can be given a note of congratulations in Office 365.

How Might Users Accomplish This Today In Office 365?

Scenario	S	Y	S	Cloud	D	O	People	V
Provide A Note Of Congratulations/Praise	☐	●	☐	☐	☐	☐	☐	☐

When To Use...

Praising a colleague or peer’s work on Yammer can be a very effective way to share a note of congratulations. Within Yammer praise is visible, indexed and discoverable. It’s also very easy to share praise for a user, can be targeted to a group or @mention individuals. In Yammer sharing, a note of congratulations doesn’t require follow up or replies to be effective. But these can be easily added to further amplify the original note of congratulations and increase its visibility and impact. Lastly because the praise works as a single thread, it ensures that when people add to the thread it remains threaded, reducing branching threads of congratulations.



You can also provide a note of congratulations to an Office 365 Group member. With the more open and public structure of Office 365 Groups more people will see and be able to share in the note of congratulations. It also encourages better threading of the conversation.

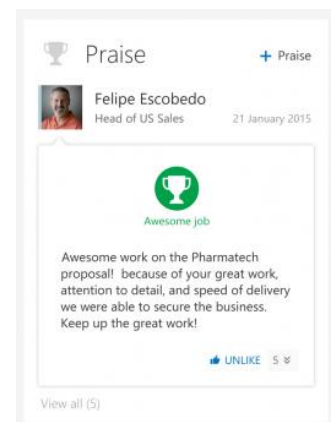
In both the Groups and Yammer options the praise can be found as it relates to a topic. In the past, we have seen relationships, connections, and sometimes business innovation being more widely shared due to praise being more public. As an example if an individual is praised for their work on building a better way to manage customer issues it enables others to ask about what that individual did, and perhaps re-use or amplify their great work to help others better manage customer issues.

There are times when providing a note of congratulations in Outlook could make sense. If it is a small group and the note is no longer relevant after a brief time. Personal/private notes of congratulation may be shared by email for this reason.

Skype for Business IMs can be easy ways to share immediate and brief praise. Keep in mind real notes of congratulation and praise should be shared when possible. One thing proven is that a video conversation where you take the time to praise, congratulate or thank a person can be far more effective than just words. So be sure to compliment praise with meaningful interactions like video (or an in-person thank you when you see them). Additionally, in larger meeting contexts (like regional meetings or broad team meetings) it can be useful to reference recent praise or congratulations that (hopefully) has already been shared in Yammer or a more public space.

In SharePoint Online, you can also run a SharePoint Intranet within your organization. Many companies provide awards, public congratulations via the Intranet, or employee spotlights to help celebrate and praise employee successes. In this way, SharePoint Online could also be leveraged.

The Office 365 Delve experience will also have Praise capability, which should be considered as it's made available. At the time of writing this paper, it is still in a preview state.



NOTE: This is an important behavior to encourage. While this may seem a like a simple activity, it can go a long way in encouraging the right kinds of collaboration and communication behaviors and culture in your organization. Considerable support and encouragement in public praise within your company should be paramount from the leadership level down. Remember that moving from individual benefits to collective benefits requires behavior changes. And all praise given is almost always due to an employee or peer going above and beyond to provide collective or shared benefit.

When Not To Use...

If it is a public acknowledgment of good work don't lock it to a small email thread in Outlook. Share the note of congratulations or praise publically on Yammer instead. This unlocks the conversation, provides a history of praise the employee can look back on and share, and it also helps other people discover more about the individual praised.

Avoid brief IM messages of praise or congratulations if there are more public options available and you feel comfortable sharing in these spaces.

4.7.12. I Want To Make An Organizational Announcement About A New Hire

As people move and change roles, or new hires are brought on, often this needs to be shared. What's the best way to do this with Office 365?

How Might Users Accomplish This Today In Office 365?

Scenario	S	Y	S	Cloud	D	O	People	V
Make An Organizational Announcement	☐	●	☐	☐	☐	☐	☐	☐

When To Use...

One of the most popular ways this is done today by making an email announcement to a distribution group or a few large collections of contacts. The good news is that if you are using Outlook and Office 365, you can at least set a rights management policy on the outgoing email to remove the ability to reply all. One of the issues with this method is that it makes this a one-way communication with a forced individual reply or follow up to the individual who has joined the team. This could be desired, but often the outcomes from a shared message on Yammer or within Office 365 Groups provides more opportunities for others to join in on congratulations or welcome a new hire into the company.



Posting the organizational announcement in Yammer (often as well as sharing it via email) can enable people to chime in on the announcement. It avoids the reply all risk sometimes contained within emails, and it keeps the entire dialog threaded within Yammer so that people can go back to it or find it later. This can be useful for others to find samples of how to make that kind of an announcement, it can help others know when a person started a new role who might not have access to that

information otherwise, and it can be shared across multiple groups or @mention individuals without causing additional email load.

Keep in mind that Yammer should be a complimentary strategy not an option on its own. People who don't have notifications set up or do not review their Yammer notifications could miss the post. Also, keep in mind that the email could be a link to the Yammer thread which further encourages the dialog to take place in Yammer rather than via email.

In the same way, an Office 365 Group can be a great place to post and share the announcement. With Office 365 Groups like Yammer, you can highlight which users should be a part of the discussion or which Office 365 Groups should be part of it.

When Not To Use...

During a Skype for Business meeting with a large audience or a team, you might highlight the new hire announcement. But Skype for Business shouldn't be how you communicate the announcement; it is more of a complimentary option to call attention to the announcement or preview it.

SharePoint Intranets often contain messages like new hires, promotions or people on the move so it could also be a strong option. If possible, tie this announcement to a Yammer thread to capture feedback and dialog depending on the nature of the hire. This can also be a great way to control the message further and can complement email notifications that reference the Intranet post.

4.7.13. Remind The Team Of An Important Deadline

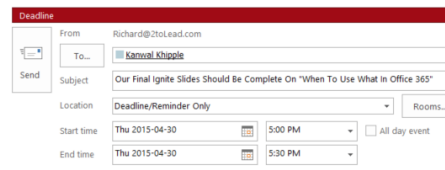
When communicating with a team, you may need to remind them of an important deadline that is coming up to inspire action (or remind of a deadline that has been passed with outstanding actions). Office 365 is a great place to improve the visibility and response to deadlines for your team.

How Might Users Accomplish This Today In Office 365?

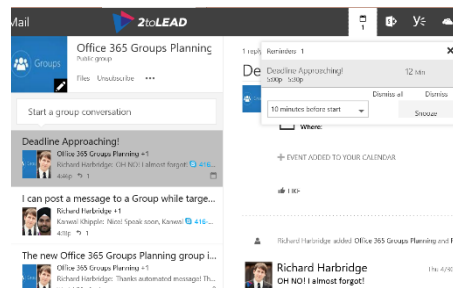
Scenario	S	Y	S	C	D	O	P	V
Remind The Team Of An Important Deadline	●	●	●			●	●	

When To Use...

Outlook calendar and email can be a great way to remind team members of an important deadline. You could create a calendar appointment and invite the entire team to it. You can also create earlier appointments reminding them of things like a deliverable being due the next day. This is also easy to forward to others with additional notes or context; if perhaps the individual you remind isn't the one holding up a step in the process, but they know who would benefit from being reminded of the deadline's impact. You could also use task management and updates to accomplish similar things within Outlook.



Office 365 Groups can be used to remind Office 365 Group members, other Office 365 Groups and additional individuals of an upcoming deadline in the same way Outlook can - by creating a shared appointment in the Office 365 Group calendar while also enabling a threaded conversation about the appointment.



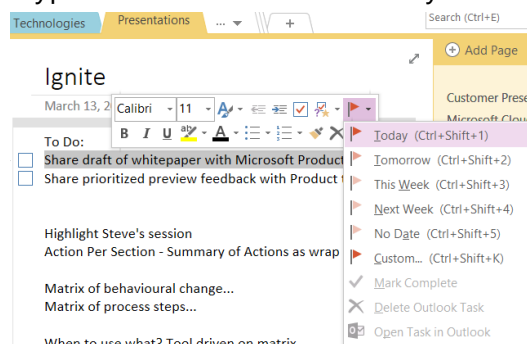
SharePoint also has robust task management capabilities.

Depending on the nature of the reminder, you may even be able to automate the reminder using SharePoint workflow. This can be triggered based on an information rights policy criteria being met or conditions that trigger the workflow, like an item being updated or added that meets pre-defined criteria. SharePoint can provide other communication options as well, but the automated, advanced workflow or information policy are probably the most compelling reasons to leverage SharePoint Online in combination with other options.

Remember too that Project Online is a great part of Office 365 and provides additional ways to manage, remind and alert project team members. While not called out above it would also be an option worth considering, especially if the deadline relates to ongoing projects or their milestones.

When Not To Use...

You can notify individuals or teams and remind them by using Skype for Business and often may remind teams during team meetings on Skype for Business. Due to the nature of many individuals' busy lives, it is often recommended to send them a reminder that will live on after the meeting. Keep in mind that shared meeting notes in OneNote can have tasks added to Outlook; so there are multiple paths to individuals setting their reminders or distributing tasks from a Skype for Business meeting.



Additionally, setting up an ad-hoc Skype for Business meeting to discuss a deadline, or using it to compliment Outlook or SharePoint can be extremely useful.



While you could remind people of a deadline in Yammer, it may not be the preferred method if you need to make sure that people see and act on information.

4.7.14. Where Should I Manage And Track Project Tasks?

Managing tasks is a core activity for project management to ensure successful execution. Your tasks need to be easily managed and provide the necessary insight into each project. At a portfolio level, management should be informed of critical tasks which could have an adverse impact. Currently, project tasks are tracked in various ways at most organizations, including project plans and Excel documents.

How Might Users Accomplish This Today In Office 365?

Scenario	S	D	V	Y	X	O	Cloud	People	Checkmark	P	Online	S
Track Project Tasks					●	●			●	●	●	●

When To Use...

There are many ways in which tasks can be managed. When the project management team is very small or projects are infrequent; Excel can provide a simple way to track tasks and provide an update. The tasks information is stored in the document, and simple roll-up dashboards can be created to provide an overall view of several projects. Outlook can assign tasks to other individuals and provides a notification system to let you know that a task is due.

Office 365 Planner has been recently introduced and provides a simple Kanban-like user interface for unstructured task tracking. Each Plan is associated with its own Office 365 Group, which you can use to manage project documentation, calendars, discussions, and minutes. You can group tasks and assigned to other individuals and get a quick glance on progress using a predefined dashboard view.

SharePoint Online provides you with Task lists which can easily integrate with Project, Project Online, and Outlook. These integrations allow your project team to work both online and offline to update task information. When you use the Project Site templates to create a new site, it comes with a Project Timeline view which provides you with a quick glance at where the project is at and which tasks are coming due or are overdue. Additional views offered by SharePoint Online Tasks include a GANTT view, Calendar view, as well as tasks assigned to yourself. In addition to being alerted about tasks that are due or late, SharePoint Online lets you set up alerts when new tasks are created, or existing ones are modified.

Microsoft Project is your foundational fully-featured task management app which is can track detailed task progress and sequencing and report on critical path advancement and other project management-

related activities. This desktop app integrates nicely with SharePoint Online to allow others to get an overview of the tasks and report their updates. Building on this synergy is Project Online, which is a project portfolio management (PPM) tool that lets you view the big picture on all projects and do resource planning.

When Not To Use...

While Excel provides an easy way to track individual or small collections of tasks for a project it does not work well when trying to manage more complex tasks with dependencies.

When needing to collaborate on project plans simultaneously, Project suffers from the same limitation as it is also a desktop-based application.

Outlooks value diminishes when you need to have some sequence to the tasks and provide visibility to others as the tasks exist in each individuals' workspace.

In situations where a significant amount of work is done while not connected to a network then Planner, Project Online, and SharePoint are not viable as they are cloud-based solutions.

4.7.15. Track Project Logs

Monitoring risks, issues and other logs are similar to the activities you use when tracking tasks. These logs are related to the project but aren't necessarily tasks.

How Might Users Accomplish This Today In Office 365?

Scenario	S	D i	V	Y<	X	O	Cloud	People	Checkmark	P	Online	S
Track Project Logs					●	●			●		●	●

When To Use...

When a single individual manages projects, then Excel lends itself well with color formatting and charts. When visibility on such items grows, you need to have a way to share it effectively with other stakeholders. At the other extreme of the app spectrum lies Project Online, which lets you track risks and issues well. Somewhere in the middle lies SharePoint Online where you can easily set up Issue tracking and make it available to other to see and track.

Another way to deal with these items is to track them as separate tasks. Using this method, you are still providing visibility and responsibility for resolution.

When Not To Use...

As with the tasks, Excel and Outlook fall short when it comes to managing such logs on a large scale that provides stakeholders with a real-time update without needing to drill into specific documents.

Planner is not able to provide the level of severity, priority, cost, or other data typically tracked with those types of logs.

4.7.16. I Want To Store And Share Project Documents

At the core of many businesses, they create intellectual property in the form of documents which are shared amongst its employees. With large collections of files (potentially in the TBs) representing many years of projects and operational information primarily stored in personal folders, there is a heavy reliance on historical knowledge to find data that you may be searching for.

When documents are created, they should be organized in a way that can easily be unearthed by individuals who are not directly involved in the project or sales activities for which the documents were created in the first place.

How Might Users Accomplish This Today In Office 365?

Scenario	S	D	V	Y	X	O	Cloud	People	Checkmark	P	Online	S
Store and Share Project Documents							☾	☾				●

When To Use...

Today there are three apps which provide document management functionality – OneDrive for Business, Office 365 Groups, and SharePoint Sites. The ideal choice depends on an understanding of how it will be used.

First, it may be important to ask who the file is intended for. If it’s just for you, then OneDrive for Business will be the optimal place. If you are interested in sharing the file with others, then while OneDrive for Business can provide this option, you may be better serviced by a SharePoint Site library or an Office 365 Group.

SharePoint has robust administrative and security controls for document storage and is a true document management system. Files may be checked in/out, and you can incorporate team collaboration for related content. SharePoint is also efficient at assigning workflow around documents and provides metadata capabilities so you can track the stage of documents, or take action based on the state or conditions a document meets. Office 365 Groups also provide some significant capabilities

for both storing and sharing documents as well as taking documents stored in SharePoint or OneDrive for Business and 'sharing with' the Group. In the latter scenario, the documents are put or stored in the other locations but shared in with the Office 365 Group to improve collaboration. Membership in an Office 365 Group gives you full access to upload, modify, or delete files.

OneDrive for Business and SharePoint sites can be accessed from any computer or mobile device, and both have the ability to share a file. But a SharePoint site's library might be a better location as it inherits, or may be assigned permissions (and shared with people), based on where it's stored versus the extra sharing step required in OneDrive for Business sites (unless the user has created folder structures). Both OneDrive for Business and SharePoint Libraries provide version control and make the document searchable for future reference or discovery. Both also enable the ability to edit online, and co-authoring can also be an option.

All three solutions provide you with a way to find out what changes have been made to the documents. While SharePoint Online lets you choose what to be notified about and how frequently via email, OneDrive for Business and Office 365 Groups allows you to view Recent Activity online.

When Not To Use...

Email fails at document management. There is no version control, and changes are nearly impossible to track. Given that most users' email inboxes have storage limits using email for document storage is entirely inefficient. The good news is that there are ways to share a link to a document stored in SharePoint, an Office 365 Group or OneDrive instead of emailing the document itself. The capability is available in Outlook 2016 and Outlook Online (the web interface) today. So you can still 'email' to share content, but get the benefits SharePoint, Office 365 Groups and OneDrive for Business provide.

One legacy reason people shared documents by email was that they couldn't share them with external users as easily in SharePoint or OneDrive for Business. But in Office 365 this should be easy for a user to do (assuming the organization has enabled it), and so it is no longer necessary to store the document in the email sent.

IM clients do not store documents natively and sharing as attachments in a meeting is not scalable or efficient, unless it's for ad-hoc or meeting specific reasons. The good news is that once again it's easy to share a link to the document and so that is the recommended approach.

4.7.17. I Want to Search For Content

In regular business activities often we need to find some information about our work. Perhaps the information was captured as part of a past project or general communication, so we look to Office 365 to help us find it.

There are some ways you can leverage Office 365 to assist in obtaining information. Depending on the type of information that you seek, different tools will provide you with better results.

How Might Users Accomplish This Today In Office 365?

Scenario											Online	
Searching for Content		●	◐	◐		◐		◐	◐			●

When To Use

Overall, Office Delve provides the most comprehensive set of search results from SharePoint Online, OneDrive for Business, email attachments, Video Portal and Yammer links. Unlike traditional search, these results are based on user behavior and connections between individuals in the organization. Delve enables you to find content based on people with which you interact.

With SharePoint Online Enterprise Search, we can do extensive searching based on the content stored in it, OneDrive for Business and Video Portal. SharePoint Search is an unyielding option, and a good choice for most situations, especially since the SharePoint search experience provides refiners that can quickly enable someone to narrow their search based on a department or keywords related to the search.

Finally searching for information within specific apps can help unearth content not found in Office Delve or SharePoint Online such as Yammer, Planner, and Groups.

When Not To Use...

While possible to find the right information by asking colleagues via email or in person, this method is not very efficient because it's confined to who you know and restricted by the information you have stored within your individual email inbox. Similar to email, instant messaging is also not as efficient because you are limited to finding information among the people you know.

4.7.18. I Want To Ask a Question

We often have questions that come up, and we aren't even sure who can answer our question. When faced with situations like these there are a few feasible options in Office 365.

How Might Users Accomplish This Today In Office 365?

Scenario											Online	
Ask a Question	○			●		○		◐				◐

When To Use...

The most popular option is to post your question on Yammer. Yammer allows employees to cast a wider net and gives them an ability to reach a broader audience. Under the right governance, Yammer provides access to a diverse range of knowledge and expertise within the organization, which helps to increase your chances of getting an answer to your question. Keep in mind that you should still try and target a group within Yammer that will help categorize or increase the likelihood of an expert being able to answer your question.

In a similar way, there may be structured areas, such as projects, that match the topic of your discussion moderated or has high levels of engagement from experts that might be able to help. These can often be found in Office 365 Groups or within SharePoint Sites, especially in discussion boards. In fact, in some instances, your question may have already been posted. So be sure to do a few searches before you post to get potentially an even faster answer (or to add more context to your question as to what you have already looked at but wasn't applicable or the kind of answer you were looking for).

When Not To Use...

While possible to get your question answered via email, you're limited to people you know in your network. Eventually, your network might be able to lead you to someone that can answer your question, but email has been less efficient in this type of activity. Imagine if you're a new employee that has a question. How would you even know whom to start with? Similarly, from a Skype for Business perspective your ability to get your question answered limited to the people with whom you interact.

Keep in mind that once you find a person you think can help nothing is stopping you from reaching out via email or Skype for Business. But if that is where the question is answered, no one else shares the collective benefit of the response in the future. This is the main reason we want to encourage participation in discussions in Yammer, Office 365 Groups or SharePoint over 1:1 or personal communication approaches.

5. CONCLUSION AND NEXT STEPS

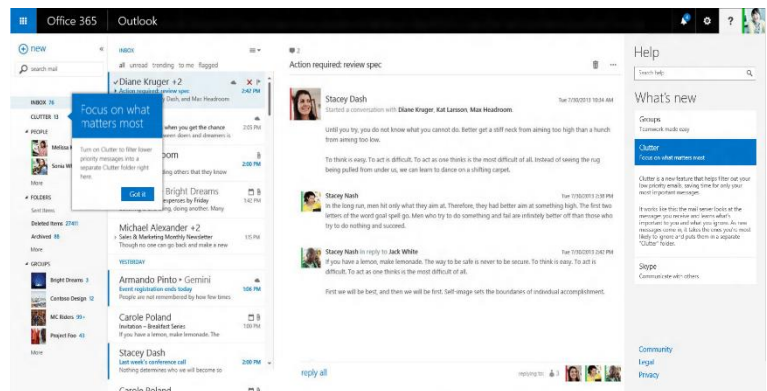
It is critically important that organizations understand that helping users understand when to use what technology is something that is a shared responsibility and a shared commitment with Microsoft and your organization.

In the introduction of this white paper, we highlighted the importance of doing something and taking pro-active action to provide better guidance, support, and education to your users and groups in the organization. We hope that you implement guidance at the organizational level, the group level, and the individual level. That you communicate the options that are available to users in Office 365 and help them better use more of the technology in more beneficial ways.

You are not alone in tackling this challenge. There is an enormous community of Microsoft Partners, community leaders, and experts who are happy to provide guidance and have shared tons of great content online.

NOTE: You can always reach out to the authors of this whitepaper as well. They are happy to receive adoption questions (as they write prolifically about adoption as evidenced by the length of this document). Contact information can be found in the About the Authors section.

We mentioned this is a shared commitment above because Microsoft is also working hard to help organizations maximize the value Office 365 can provide. Microsoft is making significant strides forward in helping provide more user guidance in context, in the applications, and helping provide introductions as new features and capabilities are brought into the Office 365 service. Pictured on the right is a great example of user guidance that introduces the user to new capabilities that have been implemented in Office 365.



Microsoft is communicating what's coming ahead of time as well through a public roadmap for Office 365. At the organizational level, your organization should invest in understanding and review this roadmap on a regular basis with trusted Microsoft advisors; either through a Microsoft Partner like 2toLead, an internal lead/expert or by connecting with Microsoft directly. You can see the latest launched updates, those that are still rolling out and those that are in development on the Office 365 roadmap at <http://roadmap.office.com/>.



YOU WILL LOVE THE WAY WE WORK.
TOGETHER.

Remember that each innovation and new capability are introduced to Office 365 is based on customer requests. You can share your voice in helping the Office 365 product team understand what is important to you by voting and sharing feedback at <http://office365.uservoice.com/>.

Finally, don't digress into a 'versus' discussion when you should be focusing your attention on driving adoption and guiding users to maximize their usage of as much of the platform as they are able. Once you understand Office 365 consider thinking about Office 365 **and** Azure. There are always more ways you can leverage Microsoft technology to make a meaningful difference in the work you do and the work of your organization.



6. RESOURCES

In the writing of this whitepaper many additional pages were written but were broken out to help reduce the length. There is always more content out there, what follows are some examples and resources that compliment what is written within this whitepaper.

6.1. Our Whitepapers & Related Resources

A few of our popular (and comprehensive) whitepapers:

- [Measuring The Business Impact & ROI Of Office 365](#) – This 60+ page whitepaper outlines many key considerations around how to measure the impact Office 365 has on a business, while also outlining the ways Office 365 provides effective reporting capabilities today.
- [Intranets With Office 365: What You Need To Know](#) – This 70+ page whitepaper is a definitive guide to planning, and building world class Office 365 Intranets.
- [External Sharing With Office 365: What You Need To Know](#) – This 30+ page whitepaper outlines all of the key decisions and how to make them when it comes to enabling external sharing in Office 365, and when/where you may want to configure or extend those capabilities.
- [Driving Office 365 Adoption & Usage: What You Need To Know](#) – This 70+ page whitepaper outlines all of the key considerations when planning and improving Office 365 technology and end user adoption.

Many other great resources and samples can be found and are regularly posted on our resource site at <http://Office365Resources.com>.

6.2. Community Thought Leaders

The authors of this whitepaper are big fans of many community contributors on this subject. Special thanks to these people for their inspiration, guidance, and support.

- **Susan Hanley** – SharePoint, Knowledge Management, & Portals Consultant @ Susan Hanley LLC
 - Susan wrote a great article called [“How do I ask you. Let me count the ways”](#) which is worth a read.
- **Steve Nguyen** – Office 365 Customer Success Manager @ Microsoft
- **Chris Slemp** – Principal Solution Manager, Internal Social Platforms @ Microsoft
 - Chris wrote a recent article called [“Which tool when v3.0”](#) which is worth a read.
- **Christophe Fiessinger** – Enterprise Social Group Product Marketing Manager @ Microsoft
- **Mark Kashman** – Senior Product Manager @ Microsoft

There is a vibrant community that provides Office 365 support and can be found here:

<http://community.office365.com/en-us/default.aspx>

6.3. Microsoft Ignite 2015 Session

Kanwal Khipple and Richard Harbridge (the self-proclaimed 'awesome authors' of this whitepaper) also performed an Ignite session entitled: ***How to Decide When to Use SharePoint and Yammer and Groups and Outlook and Skype***. The [recording](#) and [PowerPoint slides](#) which summarize many key messages from this white paper can be found on Channel9 under Microsoft Ignite 2015.

6.3. Microsoft Ignite 2016 Session

Richard Harbridge returned for a second and updated rendition of the "Learn When To Use SharePoint and Yammer and Outlook and Skype" session.

6.2. Usage Listing By Product

There are many ways in which users use Office 365 products. In the following section, we have outlined 100+ ways you can use Office 365. When you plan out the tips, training, adoption activities and challenges you want to drive consider using this list as a base. And identify what you think the valuable scenarios are so that you can track how often you are taking pro-active adoption effort and how comprehensive your coverage has been.

6.2.1. Office 365

There are some things you can do in Office 365 that aren't part of a specific solution in Office 365 but are part of the Office 365 experience. Here are a few of the things you can do with Office 365 itself:

1. [Change the page you see when you sign in to Office 365](#)
2. [Navigate around applications or products throughout the Office 365 suite by using the app launcher](#) (Did you know that the app launcher can contain company apps and with Azure Active Directory it can even provide seamless single sign-on for users?)
3. [Download Word, PowerPoint, Excel, Outlook, and other Microsoft Office software](#)
4. [Connect your existing Office client \(2007, 2010, etc.\) to Office 365](#)

6.2.2. Exchange

If you want to:

1. [View your email and calendar](#)
2. [Personalize your email and calendar with themes](#)
3. [Set up automatic replies in Outlook Web App](#)
4. [Create and add an email signature in Outlook web app](#)
5. [Finding or adding a contact](#)
6. [Schedule a meeting or an appointment for yourself](#)
7. [Setting up and assigning a task to yourself or others](#)

6.2.3. SharePoint

What can you do with SharePoint?

1. [Collaborate with others on a team site](#)
2. [Set up a team site in Office 365](#)
3. [Customize the navigation on your team site](#)
4. [Share a document with SharePoint or OneDrive for Business](#)
5. [Sync a SharePoint team site library to your computer](#) (Video)
6. [Use a mobile device to work with SharePoint Online sites](#)
7. [Create and manage a blog to share information](#)

8. [Create and set up a list](#)
9. [Start using a list](#)
10. [Update your profile](#)
11. [Organize and configure a SharePoint library](#)
12. [Use columns to track, sort and filter files in a SharePoint library](#)
13. [Use columns and folders together to view library items](#)
14. [Add a column to a list or a library](#)
15. [Find information in a list or library with sorting, filtering and views](#)
16. [Create a personal view of a list or library](#)
17. [Create and edit public views of a list or library](#)
18. [Add a link to a page](#)
19. [Set up an alert or other settings for a list](#)
20. [Create your calendar](#)
21. [Adding events to a calendar](#)
22. [Understanding permissions in SharePoint](#)

6.2.4. OneDrive for Business

What can you do with OneDrive for Business?

1. [Upload a file, files, or sync files to OneDrive for Business \(Video\)](#)
 - a. [Dragging and dropping files to OneDrive for Business](#)
 - b. [Save a file to OneDrive for Business from an Office desktop app](#)
 - c. [Open a file in OneDrive for Business from an Office desktop app](#)
 - d. [Sync \(and enable offline access of\) your files with your computer\(s\)](#)
2. [Copy or move files, rename files and delete files in OneDrive for Business](#)
3. [Seeing your OneDrive for Business files on your mobile device\(s\) and tablet\(s\)](#)
4. [Use Office Online in OneDrive for Business](#)
5. [Sharing files with others with OneDrive for Business](#)
6. [Co-authoring or working on documents at the same time with OneDrive for Business](#)
7. See the edit history of a document in OneDrive for Business
8. See who you're sharing a document with
9. Change permissions of people you've shared a document with
10. Stop sharing a document or folder
11. Send email to people you're sharing a document with

6.2.5. Skype for Business

There are many things you can do with Lync/Skype for Business. Skype for Business helps many organizations and individuals stay connected to people who are important via instant messaging, email, audio and video calls, and online meetings and presentations.

Here are a few of the things many users do within Skype for Business.



1. [Find and add a contact \(Basic\)](#)
2. [Adding people to your contacts list \(including contacts outside of your organization\)](#)
3. [Check availability of a contact in Skype for Business \(Lync\)](#)
4. [Have Skype for Business \(Lync\) let you know when a contact becomes available](#)
5. [Send an instant message \(IM\)](#)
6. [Set up and test Skype for Business Audio](#)
7. [Make a call](#)
8. [Make a Skype for Business call but use your PBX desk phone for audio](#)
9. [Answer a call](#)
10. [Start an impromptu Skype for Business Meeting](#)
11. [Schedule or set up a Skype for Business meeting in Outlook](#)
12. [Set Skype for Business Meeting Options](#)
13. [Change participant settings for Skype for Business meetings](#)
14. [Share your desktop or a program](#)
15. [Use shared and private notes in a Skype for Business Meeting](#)
16. [Show, hide or change your picture in Skype for Business](#)
17. [Install Lync/Skype For Business on your phone, or tablet to participate in instant messaging and meetings from your mobile device\(s\) with just one click](#)
18. [Call into a Skype for Business meeting on your mobile or other phone](#)
19. [Record a Skype for Business meeting, and publish it](#)

6.2.6. Yammer

There are many things you can do with Yammer. Yammer helps many organizations and individuals 'work like a network'. Here are a few of the things many users do within Yammer to better work like a network.

1. [Edit your Yammer profile](#)
2. [Like a post](#)
3. [Praise someone](#)
4. [Follow a topic](#)
5. [Follow a person](#)
6. Create a group
7. Manage a group
8. [Join a group](#)
9. [Reply to a message or post a message](#)
10. [Search for people and content](#)
11. [Get the Yammer app to engage from your mobile device\(s\)](#)

6.2.7 Office 365 Delve

There are many things you can do with Delve. From sharing many documents with Boards to discovering documents based on the people you work with, it's a great place to invest to connect better with the work your co-workers are doing, and quickly find documents that you need.

Here are some of the things you can do with Delve:

1. [Group and share documents in Office Delve](#) (Work together on documents in Office Delve)
 - 1.1. [Create a board and add documents](#)
 - 1.2. [Follow a board](#)
 - 1.3. [Share a board with others](#)
 - 1.4. [Remove a document from a board](#)
 - 1.5. [Go to a board](#)
 - 1.6. [Share a document with others through email](#)
 - 1.7. [Give other people access to your document](#)
 - 1.8. [Work with others on documents in Delve](#)
 - 1.9. [Work together on documents by using Yammer](#)
2. [How can I find people and information in Office Delve?](#)
3. [Store your documents where Office Delve can get to them](#)

6.2.8 Office 365 Video

What can you do with Office 365 Video?

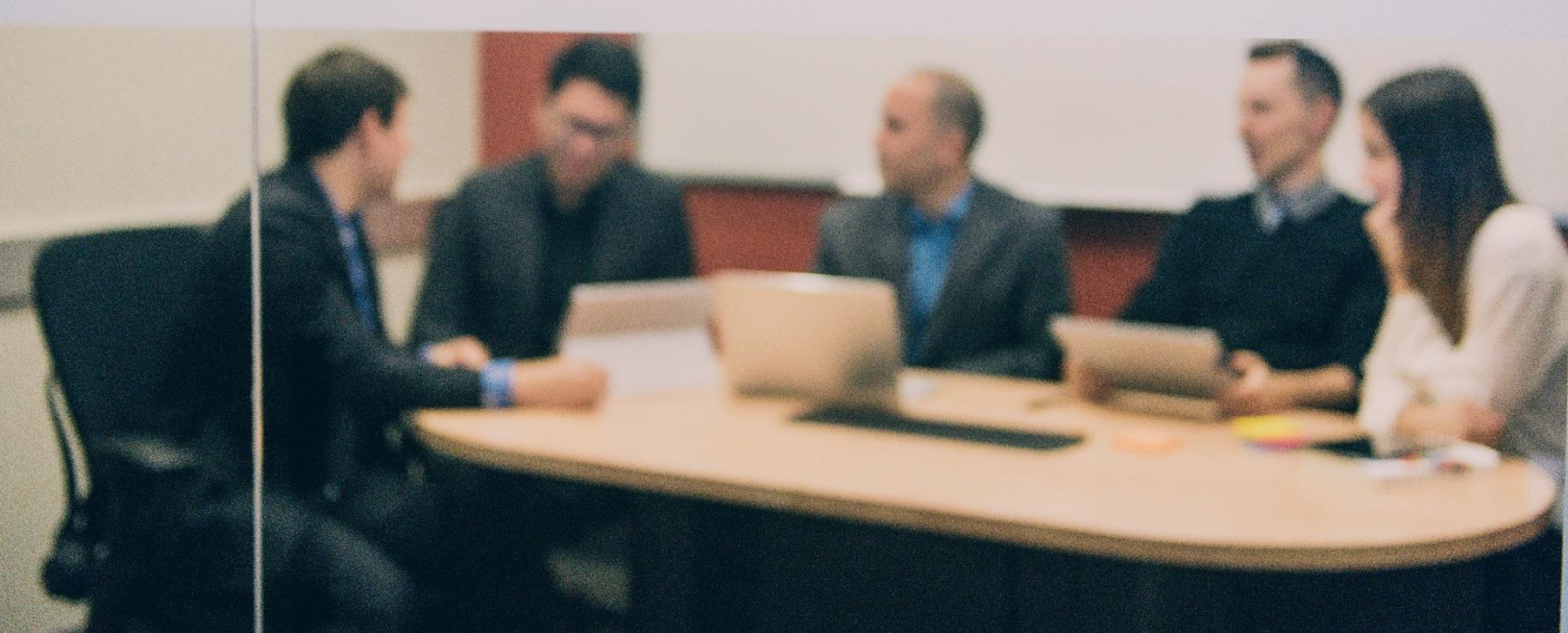
1. Upload a video (to a specific channel)
2. Watch a video
3. Share a video with others (post to Yammer or send a link to a video in an email)
4. Find & view one of the most popular videos
5. Find & view one of the newest videos
6. Find & view a video that you've uploaded
7. Search for a video
8. [Create and manage a channel in Office 365 Video](#)
 - a. Create a channel
 - b. Editing information about a video
 - c. Deleting a video
 - d. Changing channel permissions
 - e. Spotlighting videos in a channel
 - f. Change a channel's name and color
9. [Manage Office 365 Video Portal](#)
 - a. Change admin permissions for channels or Office 365 Video's home page.
 - b. Spotlighting videos on the Office 365 Video home page.

- c. Disabling or re-enabling Office 365 Video

6.2.9. Office 365 Groups

What can you do with Office 365 Groups?

1. [Create an Office 365 Group](#)
2. [Navigate Office 365 Groups](#)
3. [Find, join or leave an Office 365 Group](#)
4. [Add or remove an Office 365 Group as a favorite](#)
5. [Have an Office 365 Group conversation](#)
6. [Like an Office 365 Group message and view Likes in the Groups pane](#)
7. [Share Office 365 Group files](#)
8. [Add, edit, and subscribe to Office 365 Group events](#)
9. [Manage an Office 365 Group](#)
 - Edit Group Settings
 - Edit the Group photo
 - View, add or remove members from a Group
 - Approve a membership request to join a private Group
 - Find, add or remove Group administrators
10. [Delete an Office 365 Group](#)
11. [Manage Group Membership in the Office 365 admin center](#)
12. [Disable Group creation](#)



9. ABOUT 2TOLEAD

2toLead has been labelled as a generous Microsoft consulting company by its clients and employees. 2toLead employs trusted, passionate and experienced consultants who work hard to solve the most challenging business and technology problems that face our clients.

The Top 3 Ways 2toLead Helps Customers:

1. **INCREASE ADOPTION** by going far beyond just deploying things right and ensure your organization is being pro-active in getting the maximum value out of your technology investments.
2. **LEVERAGE THE CLOUD** to reduce costs, improve business agility and capabilities inside and outside of your organization by leveraging cloud technology like Office 365 and Azure.
3. **IMPROVE EXPERIENCES & ENGAGEMENT** by understanding where, how, and why users interact with your business while building world-class portals, social networks and websites that your customers, partners and users love.

The reason 2toLead is called a generous consulting company is that when we hire employees, it is extremely important to us that they are both passionate about technology and generous people. The generosity of our employees is a critical reason for why we are so successful. Most of our customers hire us to 'give advice' and we believe the give portion of that statement is just as important as the advice portion.

For more information:

- Visit our website at www.2toLead.com
- Follow us on [LinkedIn](#)
- Like us on [Facebook](#)
- Follow us on Twitter [@2toLead](#)



YOU WILL LOVE THE WAY WE WORK.
TOGETHER.



Kanwal Khipple

Kanwal, Founder & CEO of 2toLead, is a leading User Experience expert within the SharePoint industry, with experience in building award-winning portals and solutions that take advantage of Microsoft's Cloud platform (SharePoint, Office 365 & Azure). Kanwal's drive for success as the Creative and Technical Lead on projects has garnered him as a recipient of the Neilson Norman award for Top 10 Intranets (2014 & 2015).


Kanwal's passion lies in continuing to push for user experience innovation when redesigning intranets for the majority of the largest brands in the world. He continues to preach on the importance of designing with usability as the primary focus. Kanwal's thirst to share knowledge has made him a prominent figure within the SharePoint community. Because of his passion and his involvement in many community driven events including launching successful user groups in Canada and the USA, Kanwal has been recognized as a SharePoint MVP by Microsoft (2009 to 2013) and most recently as an Office 365 MVP (2014-2016). He's also co-authored a book on Pro SharePoint 2013 and Responsive Web Development <http://amzn.to/sp2013rwd>

Feel free to reach out to him if you'd like to discuss your project, want to run an idea by him or just want to reach out to a friendly technologist.

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RICHARD HARBRIDGE

Richard is the Chief Technology Officer and an owner at 2toLead. Richard works as a trusted advisor with hundreds of organizations, helping them understand their current needs, their future needs, and what actions they should take to grow and achieve their bold ambitions.

Richard remains hands-on in his work and has led, architected, and implemented hundreds of business and technology solutions that have helped organizations transform both digitally and organizationally. Richard has a passion for helping organizations achieve more; whether it is helping an organization build beautiful websites to support great content and social strategy, or helping an organization leverage emerging cloud and mobile technology to service better their members or the communities that they serve.

Richard is an author and an internationally recognized expert in Microsoft technology, marketing, and professional services. As a sought-after speaker, Richard has often had the opportunity to share his insights, experiences, and advice on branding, partner management, social networking, collaboration, ROI, technology/process adoption, and business development at numerous industry events in around the globe. When not speaking at industry events, Richard works with Microsoft, partners, and customers as an advisor to business and technology, and serves on multiple committees, leads user groups, and is a Board Member of the Microsoft Community Leadership Board.



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TOGETHER.