

OFFICE 365 ADOPTION CHECKLIST



By choosing to leverage the power and flexibility of Microsoft Office 365, your business is in fine company. Many of the most successful businesses in the world (and locally in your industry) are reaping the rewards of having made the same decision.

But the big question is – are you getting the most out of Office 365? Many organizations take the step into Office 365 to move their email to the cloud, which is great, but then fail to take advantage of all the other amazing stuff that Office 365 has to offer.

Is your business getting the most value from office 365?

Use your 2019 Microsoft Office 365 Adoption Checklist to see how you're doing:

Mobile Devices

- "Any device, anywhere, anytime" is Microsoft's main mantra. Office 365 provides unprecedented ability for your people to work on the go, from anywhere, on any device. How are you taking advantage of this?
- Provide mobile mailbox/calendar access to staff using the Outlook iOS/Android app
 - Use the Office suite of apps on mobile devices such as iPads, phones
 - View recently modified / emailed files in OneDrive app
 - Access SharePoint sites & Libraries on the run
 - Take photos of whiteboards, presentations and receipts using the Scanning feature and save the pdf into OneDrive.

Exchange Online / Outlook

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- Use Outlook Calendar to schedule virtual meetings
 - Share Calendars & Contact lists within your team
 - Use security and transport rules, filter and flag internal vs. external messages
 - Use online in-place archiving for larger or archival mailboxes
 - Manage the distribution groups for emails
 - Utilise shared mailboxes and access to other users' mailboxes/calendars
 - Resource management for rooms, equipment, assets etc
 - Delegate access - PA can accept meetings on your behalf
 - Out of Office – Automated reply when you go on leave

Teams

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- Use for all communications and virtual meetings to replace Skype for Business
 - Structure all project related activity and material in one place
 - Use team chat to reduce unnecessary email chatter
 - Tie Teams into MS Flow to automate notifications to group discussions.

Sharepoint & One Drive

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- Use OneDrive and SharePoint for file storage and stop paying for Dropbox and Sooner.
 - Move away from traditional server file structure with views and filters
 - Real-time file sharing and collaboration with @ mentions
 - Track changes to documents with version control
 - Advanced search functionality - search content within a document
 - OCR capability to read PDF files
 - Document collaboration – multiple users edit a document at once

- Flow** Automate email marketing list sync between CRM and email marketing platform (eg: Mailchimp)
 Plays well with MS Sharepoint. Automation of approval processes, archival of data, etc.
- Powerpoint** Use a simple keyboard shortcut (Ctrl+P) to turn your mouse into a laser pointer during your PowerPoint presentations. If you hold your finger or stylus down on a touch-screen device, the red button fake laser pointer will appear.
 Use new proofreading tools
 Transform drawings into diagrams.
- Word** Resume reading feature: pick up where you left off, even on different devices. Word automatically bookmarks the last page you were reading.(Shift+F5)
 Transform documents into Web pages via Sway
- Excel** Use Excel Insights. AI Algorithms highlight patterns within datasets, streamlining the process of analyzing data.
- Planner** Create plans, organise and assign tasks, share files, set due dates and facilitate status updates. Complete with visual dashboards and email notifications.
- Stream** Record a welcome message from the founder for all new employees
 Provide a video library of internal training videos for staff
 Project Updates. Communications channel for Project Teams to share progress and impact information for internal customers.
 Auto-transcript audio from video
- Forms** Streamline internal data collection procedures with eForms
 Survey client satisfaction and feedback
- Power BI** Combine data from different databases into a single view
 Display real-time dashboards of key business metrics
- To Do** Set your priorities for the day and check items off your list using the To Do app on desktop and mobile device.
- StaffHub** Manage work shifts and rosters for your team
 Allow the team to share/swap shifts autonomously without using HR as middle man
 Use mobile app for team to view and modify information on-the-run

For more enquiries about how you can fully utilise your Office 365 subscription, reach out to us:

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