IMPROVING COMMUNICATION AND COLLABORATION USING OFFICE 365

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Infoxchange is a not for profit organisation that has supported hundreds of non-profits with Office 365 including:
Agenda

1. What is Office 365?
2. Common uses of Office 365?
3. What do you get with Office 365 E1 plan and paid add ons?
4. The current full suite of Office 365
5. Collaboration factors to consider
6. 8 Common NFP Scenarios where Office 365 adds value
7. What's next in Office 365
8. Top 10 tips for Office 365
9. Additional resources and services
10. Questions
What is Office 365?

Common uses from other non-profits

- Improved SPAM and malware security
- Cloud based storage in Australia (reduce need for some backups)
- Organisational Intranet or knowledge base
- Discussion boards and group communication
- Point of presence and instant messaging
- Access information from anywhere on any device and any recent web browser
- Access information using mobile apps

- Improved password security

- Mobile Device Management

- Internal processes and forms

- Business Intelligence and dashboards

- Booking of resources and rooms

- Project management tools

- Document collaboration and co-authoring

- Share contacts, distribution lists and calendars

- Email platform using custom domain

- Storage of client information

- Partner portals and information sharing

- Common uses of Office 365

- Collaboration tools

- Staff communication

- Admin and management

- Mobility

- Client communication

- Reducing risk
What do you get in your free E1 plan?

Office 365 Nonprofit E1 or E2

- Designed for organizations of all sizes (unlimited users)
- 24/7 IT-level phone support for critical issues
- Available as a donation to qualifying nonprofits
- 50GB Exchange mailbox per user
- 1TB OneDrive storage per user
- 1TB storage per organisation plus 500mb per user
- Basic mobile apps (Office apps are read only)
- Office Web apps only (Word online, Excel online etc)
## Popular paid add ons (as well as E1)

<table>
<thead>
<tr>
<th>Plan</th>
<th>Function</th>
<th>Cost per user per month ($AUD)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Office Pro Plus</td>
<td>Office 2016 Pro desktop and mobile apps (5 devices). Monthly payment using click to run install</td>
<td>$4.84</td>
</tr>
<tr>
<td>Business Premium</td>
<td>Office 2016 standard for small organisations (under 300)</td>
<td>$4.18</td>
</tr>
<tr>
<td>E3 Plan</td>
<td>Office 2016 desktop, legal hold, encryption</td>
<td>$6.71</td>
</tr>
<tr>
<td>E5 plan</td>
<td>Office 2016 desktop, PSTN conferencing, PABX</td>
<td>$22.22</td>
</tr>
<tr>
<td>Enterprise Mobility Suite</td>
<td>InTune, Azure AD Premium</td>
<td>$3.53</td>
</tr>
<tr>
<td>Advanced Threat Protection</td>
<td>Protection against malware</td>
<td>$0.84</td>
</tr>
<tr>
<td>Project</td>
<td>Project mapping, gaant chart, task management</td>
<td>$16.83</td>
</tr>
<tr>
<td>Visio</td>
<td>Process mapping, charts, diagramming</td>
<td>$8.36</td>
</tr>
<tr>
<td>Power BI pro</td>
<td>Administration of Power BI</td>
<td>$4.18</td>
</tr>
</tbody>
</table>

# The Periodic Table of Office 365

**App availability depends on license type**

Provided services include: Office 365 Groups • Enterprise Search • Microsoft Graph • MyAnalytics • Security & Compliance • Plus More

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## Employee Profiles

- **Dynamics 365**
  - CRM & ERP
    - Salesforce

## Office 365 Online

### File Storage & Collaboration

- **SharePoint Online**
  - Team file sharing & storage
- **OneDrive for Business**
  - Personal file storage [Dropbox]
- **Delve**
  - Employee profile & content discovery

### Outlook

- **Mail**
  - Outlook email
- **Calendar**
  - Outlook calendar
- **People**
  - Outlook contact list
- **Tasks**
  - Outlook tasks

## Direct Communication

- **Skype for Business**
  - Instant messaging & video chat [Skype]
- **Teams**
  - Group chat & video chat [Slack]
- **Newsfeed**
  - SharePoint’s (aka) social network
- **Yammer**
  - Social network [Facebook]

## Social Networking

- **Social Online**
  - Diagramming in the browser
- **Visio Online**
  - Social network [LinkedIn]

## Management

- **To-Do Preview**
  - To-do list for life & work [Wunderlist]
- **Planner**
  - Everyday project management [Trello]
- **Project Online**
  - Premium project management

## Project Management

- **Bookings**
  - Customer self-reservations
- **StaffHub**
  - Frontline employee hub & scheduler

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http://icsptalk/0365Table  
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Technology for social justice  |  www.infoxchange.org
LETS TALK SPECIFICS

HERE’S SOME REAL LIFE SCENARIOS THAT ARE GREAT USES OF OFFICE 365 FOR NFPS
Team communication

» Central hub for all Team communication

» Displays information from other internal (eg SharePoint) and external (eg Salesforce) applications or tools

» Desktop application and mobile app to keep you informed

» Embedded calendars and video conferencing to manage meetings

» Embedded OneNote and SharePoint library to store information
Management Dashboard

» Using Power Bi which is a user friendly tool similar to Tableau

» Displays data from multiple sources both internal (Excel) and external (finance systems or ABS)

» Displays data from existing location –doesn’t duplicate

» Accessed through SharePoint or Teams or web browser or app

» Interactive dashboards allowing drill downs, filters
Board Collaboration

» Using a SharePoint site with secure permissions for nominated board and staff

» Board members provided with Office 365 account or can use external account

» Storage of meeting minutes, agendas, policies etc

» Calendar to manage meetings

» OneNote to store informal notes and tasks

» Office 365 group to manage permissions and email communication/discussion

» Projects sites for key projects or subcommittees

» Power BI dashboard for KPIs embedded in Sharepoint site page
Managing Projects

» Planners shared using Office 365 Groups or Teams

» Similar to Trello with user friendly interface

» Facilitate cross team or topic based collaboration and communication

» Suited to Agile style projects. Project or SharePoint can be used for other methodologies

» Manage various layers of tasks including tenders or major projects
New User Process

» Using SharePoint to store and manage new user requests/induction process

» Using PowerApps or InfoPath or Forms for staff to input data (depending on complexity)

» Using Flow to automate workflow and notifications

» Use Power Bi to display information

» Similar tools can be used for a wide range of data collection/task/action processes
Facilitate an external discussion group

1. Utilise an external Yammer network to give access to third parties to communicate (e.g., parent committees)
2. Moderate discussion and/or post announcements
3. Use desktop app, mobile app or web browser
4. Create groups for topics or locations
5. Embed in Sharepoint site to share with staff
Replace your file server

1. Use SharePoint and OneDrive as your primary file storage location
2. Access files through browser, desktop or mobile app
3. Sync files to your PC for offline copies
4. Version history and permissions
5. Co-authoring for collaboration
6. Integrates well with Office 2016
Organisational Chart and contact list

1. Use Delve (Office Graph) to display and access staff information (no config required)

2. AAD Connect can synchronize local active directory (staff information)

3. Become a hub for staff information, including recent documents and projects

4. Creates user profiles for all staff and organisational chart

5. Analytics tool uses data from all Office apps
What's next in Office 365?

1. Skype for Business telephony becoming more integrated into Teams and recently launched in Australia (Office 365 calling by Telstra)
2. Recently launched ‘files on demand’ One Drive sync tool and ‘modern experience’ for SharePoint continuing to improve
3. Continued introduction of new apps eg Business centre apps including bookings and invoicing for business premium plans
4. Maturing of existing products such as Teams, PowerApps, Flow, Forms to become more common and easier to use for NFPS
5. Continued integration between apps eg webparts in SharePoint or embedding other 365 apps in Teams
6. New subscription based license model through your IT vendors (CSP) including recent pricing changes and limitations on the donation program through Connecting Up
7. Improved insights into work habits with My Analytics, Delve and the Office Graph
8. Security and compliance will become easier and more common such as two factor authentication and mobile device management

Top 10 tips for Office 365

1. Only use the applications that add value to your organisation and staff

2. Spend time considering how you use each platform prior to implementing

3. Explain the benefits to staff & support them to make the change; local ‘champions’ can help staff to make the most of the new features.

4. Ensure your infrastructure is suitable including Office 2016, internet connections, mobiles etc

5. Ensure you resource the platform and have support by either an external provider or train up a staff member

6. Eliminate and overuse of Excel spreadsheets with Sharepoint lists, Forms, or OneNote

7. Eliminate overuse of paper forms using SharePoint lists PowerApps, InfoPath and Flow

8. Reduce travel and meetings using Skype for Business, Teams and OneNote

9. Understand and leverage your data using Power Bi dashboards

10. Undertake change management activities including stakeholder engagement, training and ongoing communication.
Office 365 resources – for more information

» Office 365 for nonprofits: www.microsoft.com/office365nonprofits


» Microsoft Office online training: https://support.office.com/en-us/article/Office-365-for-business-training-e990f8ff-56d7-450e-ad9f-74ae8718ef09 or Virtual academy https://mva.microsoft.com/

» Microsoft FastTrack Resources - https://fasttrack.microsoft.com/office


Additional Office 365 support available

» Office 365 readiness assessments
  AU - http://www.connectingup.org/office365
  NZ - https://www.techsoup.net.nz/office365

» Office 365 DIY workshops
  http://www.connectingup.org/sphinxsearch/DIY%20workshop

  Basic email, Basic SharePoint, Advanced Office 365

» Additional ConnectingUp webinars including Power Bi, Azure, SharePoint, 365 implementation considerations

» Implementation and migration services

» Improve It – Free NFP IT resources online – http://improveit.org

» Strategic advice, consulting and training

» SharePoint configuration and development

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THANK YOU

PLEASE GET IN TOUCH

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