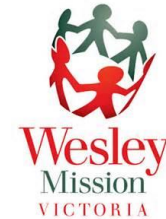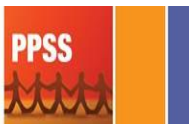# IMPROVING COMMUNICATION AND COLLABORATION USING OFFICE 365

Matt Walton – Consulting Services Manager
20th August 2018

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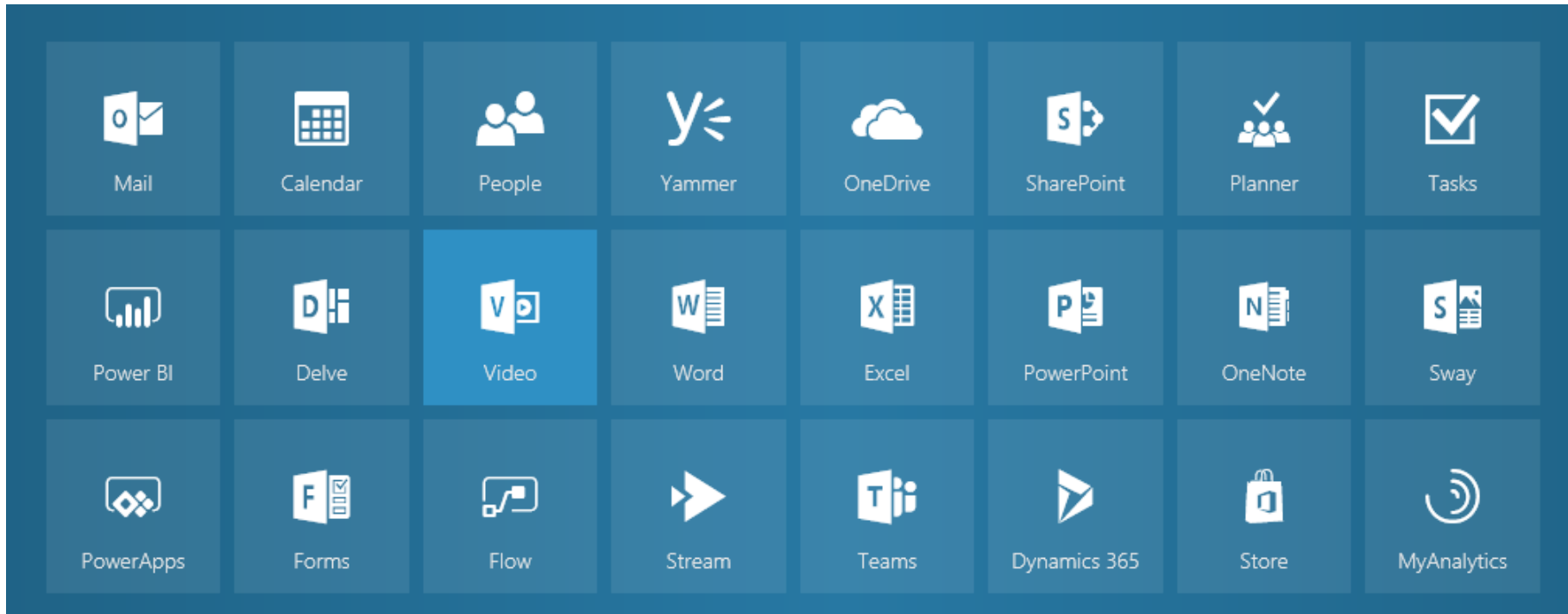
Agenda

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

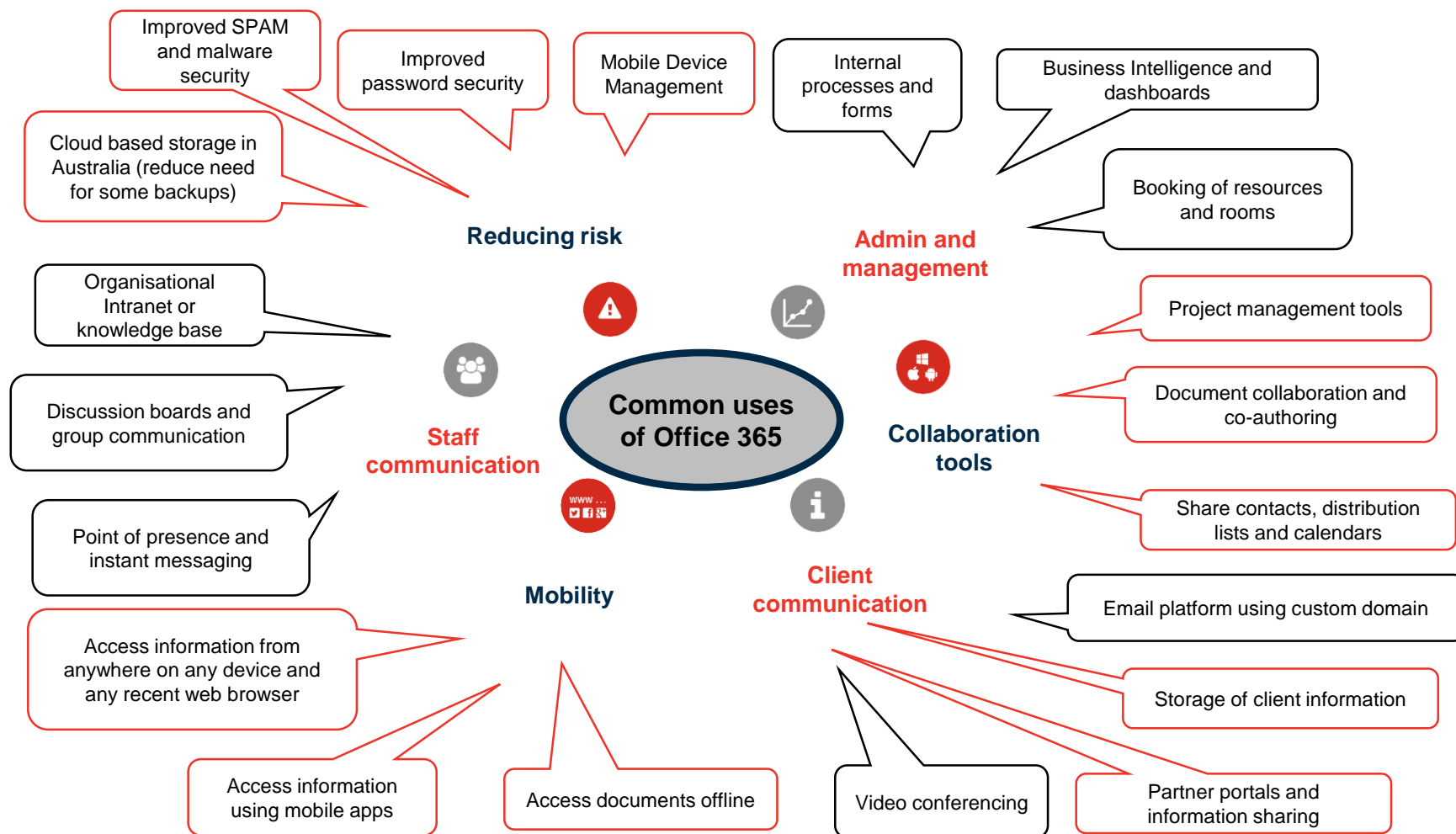9. Additional resources and services

10. Questions

What is Office 365?

https://products.office.com/en-au/nonprofit/office-365-nonprofit

Common uses from other non-profits

Improved SPAM and malware security

Improved password security

Mobile Device Management

Internal processes and forms

Business Intelligence and dashboards

Cloud based storage in Australia (reduce need for some backups)

Reducing risk

Admin and management

Booking of resources and rooms

Organisational Intranet or knowledge base

Common uses of Office 365

Project management tools

Discussion boards and group communication

Staff communication

Collaboration tools

Document collaboration and co-authoring

Point of presence and instant messaging

Share contacts, distribution lists and calendars

Access information from anywhere on any device and any recent web browser

Mobility

Client communication

Email platform using custom domain

Storage of client information

Access information using mobile apps

Access documents offline

Video conferencing

Partner portals and information sharing

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)

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

https://products.office.com/en-au/nonprofit/office-365-nonprofit-plans-and-pricing

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

Dynamics 365 $
CRM & ERP [Salesforce]

Sway
Next-gen presentations
PRESENTATIONS

ENTERPRISE VIDEO
Stream
Video portal [YouTube]

Video *Deprecating*
Superseded by & migrating to Stream

EMPLOYEE PROFILES

Word Online
Word processing in the browser

Excel Online
Spreadsheets in the browser

OneNote Online
Note taking in the browser [Evernote]

PowerPoint Online
Presentations in the browser
OFFICE ONLINE

FILE STORAGE & COLLABORATION
SharePoint Online
Team file sharing & storage

OneDrive for Business
Personal file storage [Dropbox]

Delve
Employee profile & content discovery

FORMS

Forms *Preview*
Code-free forms

PowerApps
Code-free mobile apps (& forms)

Flow
Code-free workflows [IFTTT]

Power BI
Business analytics & dashboards
BUSINESS APPLICATION PLATFORM

OUTLOOK
Mail
Outlook email

Calendar
Outlook calendar

People
Outlook contact list

Tasks
Outlook tasks

TASK MANAGEMENT

To-Do *Preview*
To-do list for life & work [Wunderlist]

Planner
Everyday project management [Trello]

Project Online $
Premium project management
PROJECT MANAGEMENT

CHAT & CONFERENCING
Skype for Business
Instant messaging & video chat [Skype]

Teams
Group chat & video chat [Slack]

Newsfeed
SharePoint's (lite) social network

Yammer
Social network [Facebook]

SOCIAL NETWORKING

Visio Online $
Diagramming in the browser

Bookings
Customer self-reservations

StaffHub
Frontline employee hub & scheduler
SMALL BUSINESS APPLICATIONS

DIRECT COMMUNICATION

*Items in [brackets] identify software with similar functionality for the sake of context

Collaboration Factors
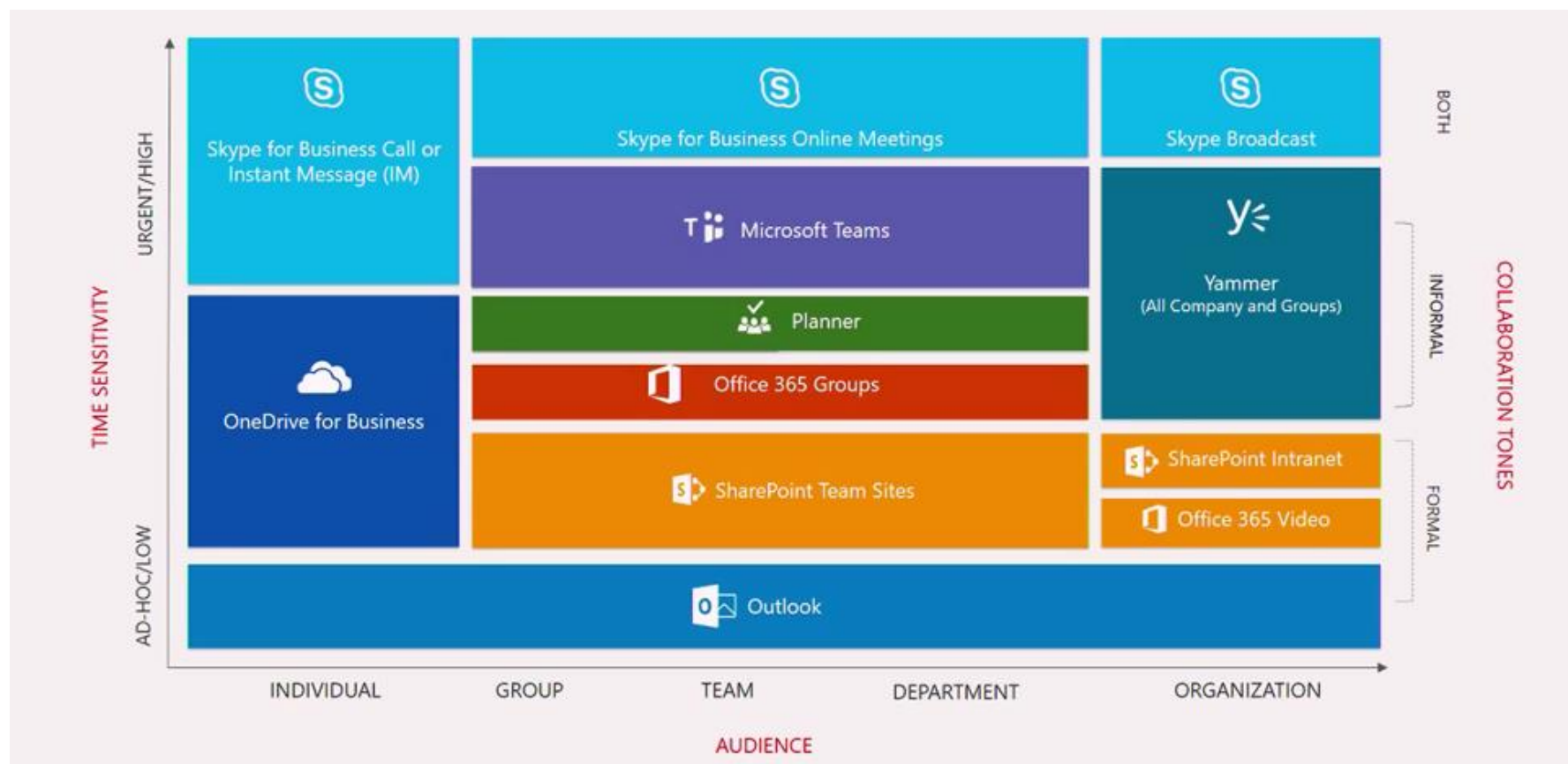
Office 365

LETS TALK SPECIFICS

HERE'S SOME REAL LIFE SCENARIOS THAT

ARE GREAT USES OF OFFICE 365 FOR NFPS

Team communication
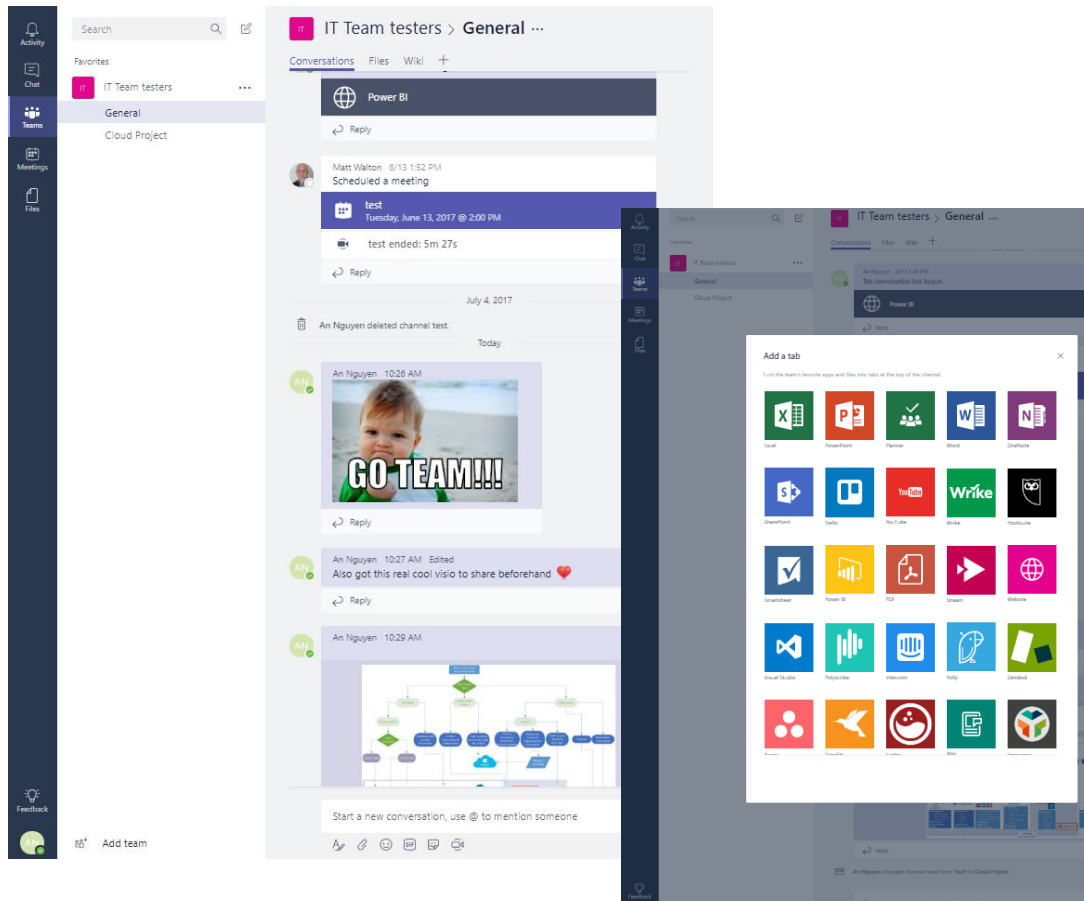
» Central hub for all Team communication

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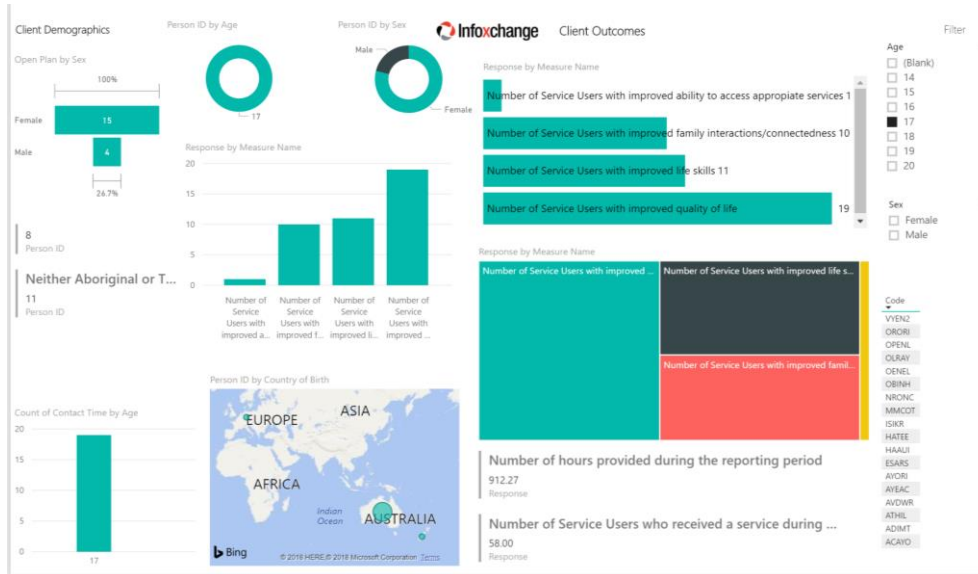
» Using Power Bi which is a user friendly tool similar to Tableau

» 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
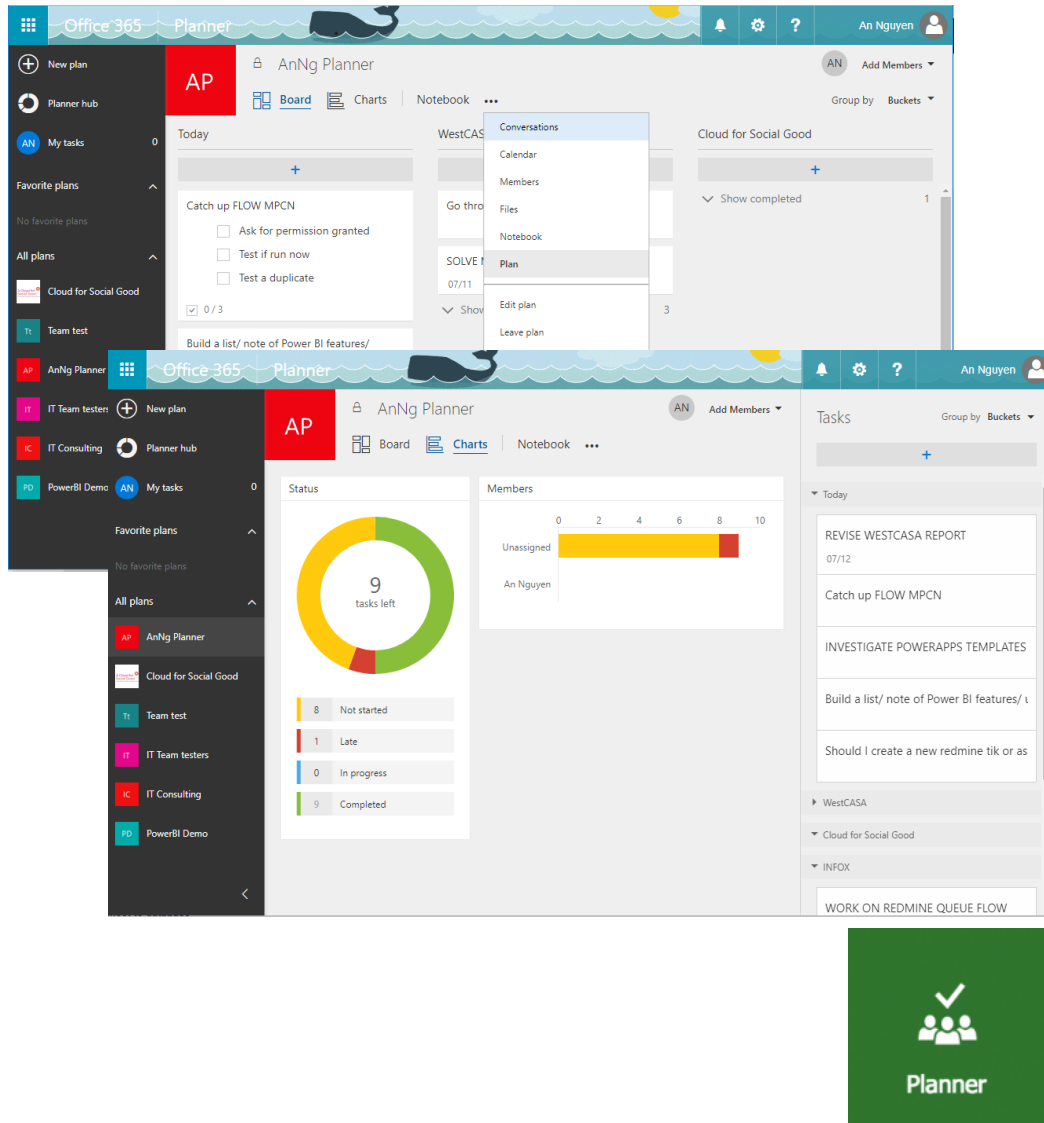
» Planners shared using Office 365 Groups or Teams

» 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
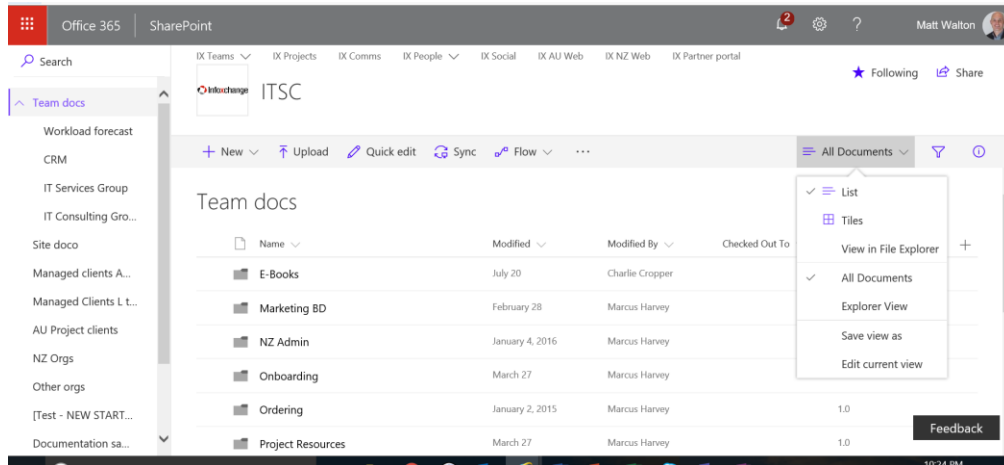
Facilitate an external discussion group
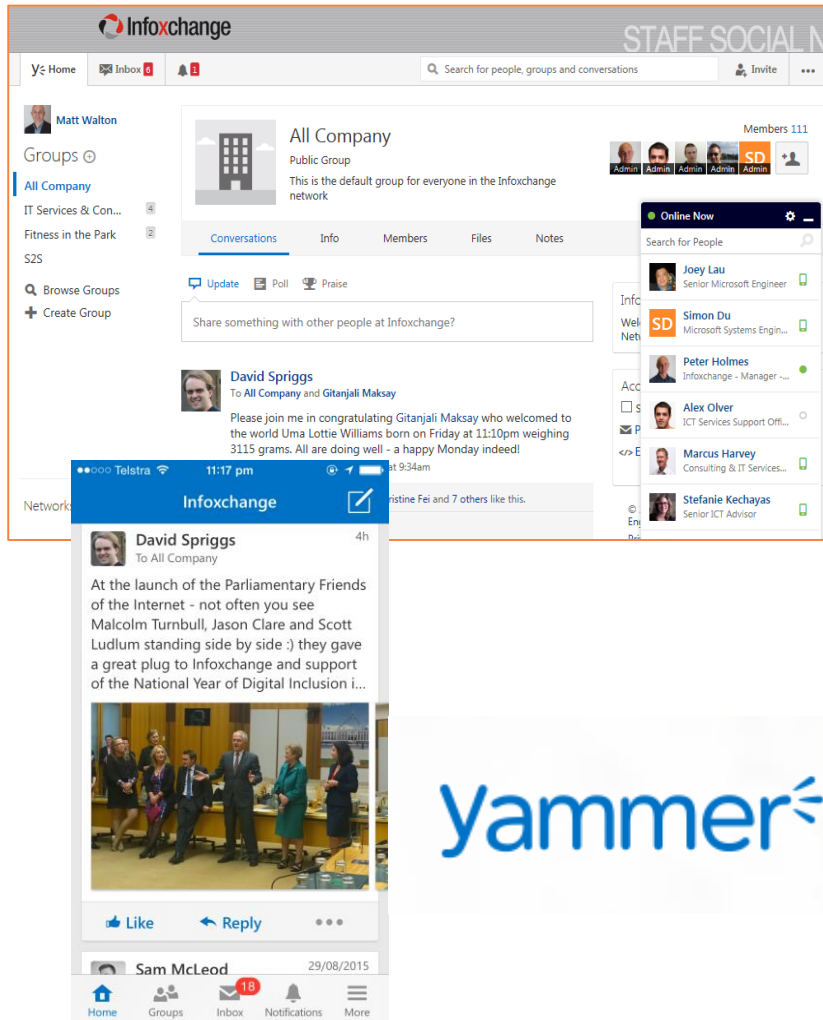
1. Utilise an external Yammer network to give access to third parties to communicate (eg parent committees)

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

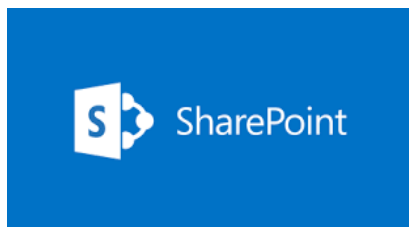2. Access files through browser, desktop or mobile app

3. Sync files to your PC for offline copies
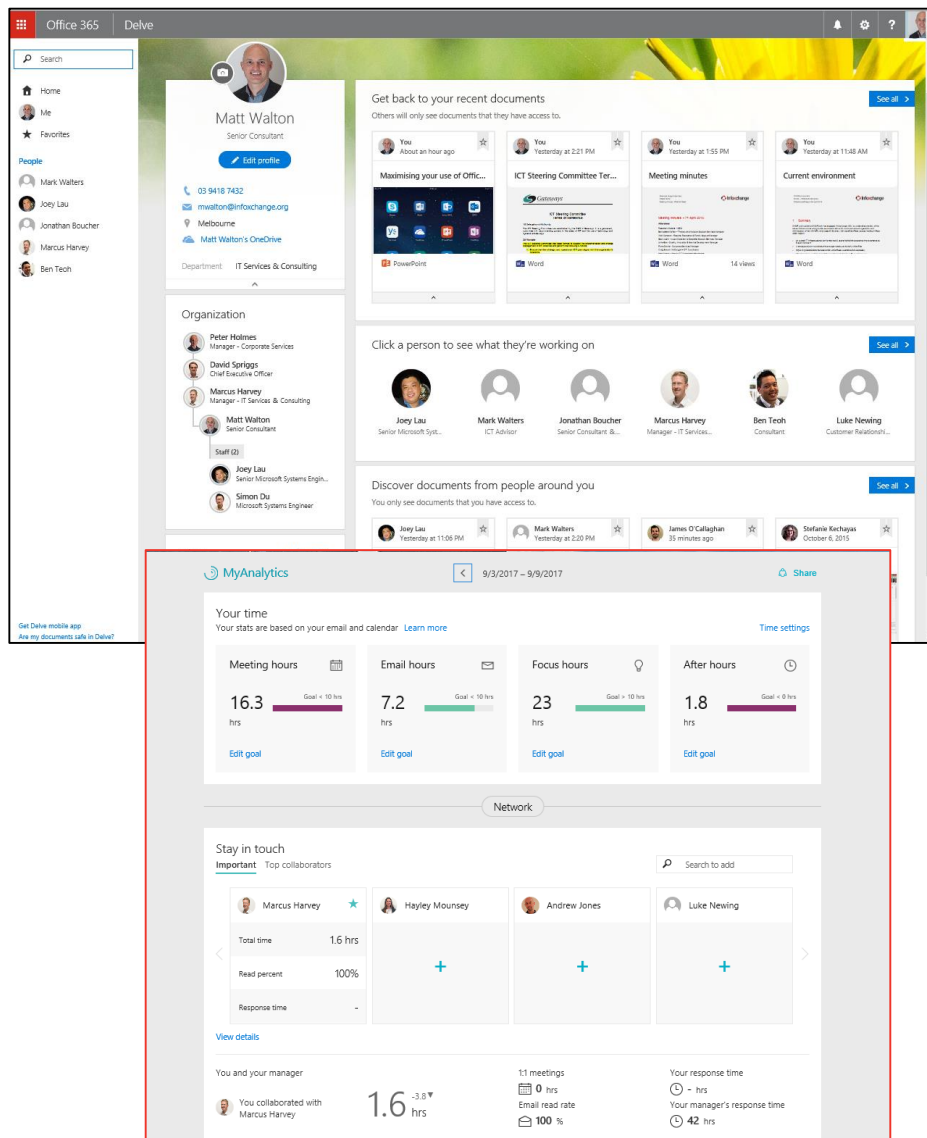
4. Version history and permissions

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

https://products.office.com/en-au/business/office-365-roadmap

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

» Office 365 roadmap https://products.office.com/en-au/business/office-365-roadmap

» E1 vs. E3 plan: http://office.microsoft.com/en-au/business/compare-office-365-for-business-plans-FX102918419.aspx

» 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

» The Microsoft Trust Centre – Privacy, Security & availability information http://office.microsoft.com/en-us/business/office-365-trust-center-cloud-computing-security-FX103030390.aspx

» Australian Privacy Principles http://www.oaic.gov.au/privacy/privacy-resources/privacy-guides/app-quick-reference-tool

» New Zealand privacy guidance on cloud computing http://privacy.org.nz/assets/Files/Brochures-and-pamphlets-and-pubs/OPC-Cloud-Computing-guidance-February-2013.pdf **&** **Microsoft's answers:** http://blogs.msdn.com/cfs-filesystemfile.ashx/__key/communityserver-components-postattachments/00-10-41-34-76/Standard-Response-to-OPC-Cloud-Computing-Checklist-for-Office-365-_2D00_-24-April-2013.pdf

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

Contact: mwalton@Infoxchange.org or (03) 9418 7432

THANK YOU

PLEASE GET IN TOUCH

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