

# Change Leaders Conference

## Change Management @ Microsoft

Steve Green

Global Director, Adoption & Change Management, Microsoft

30<sup>th</sup> September 2020



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# Agenda

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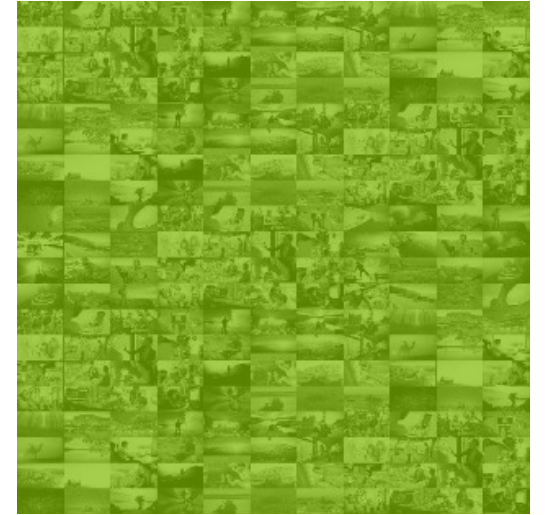
Change management @ Microsoft

Empowering employees, partners and customers

Technology is an enabler for change management

# Microsoft mission

Empower every person and every organization on the planet to achieve more



# Change management @ Microsoft



Comprehensive  
set of intellectual  
property (IP)



Prosci®  
methodology is  
research-based




Training and  
readiness



For employees

# CM methodology



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Prosci

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- WW ACM Community
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- Recycle Bin

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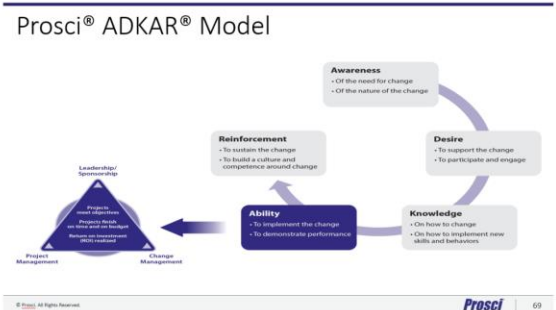
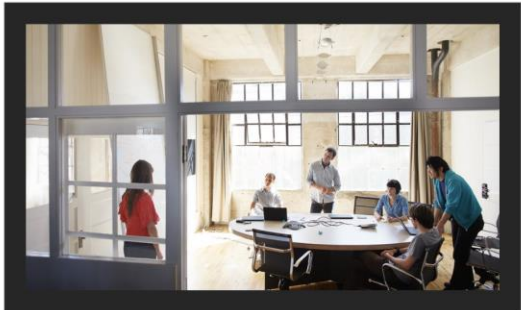
## Microsoft-Prosci® Strategic Partnership

In 2014, Microsoft entered into a significant, million-dollar investment and long-term partnership with Prosci® – the global industry leader in the professional discipline of Change Management. [Read this blog article.](#)

This partnership gives us industry credibility to engage with customers using a standardized approach to both Individual Change and Organizational Change. It also allows anyone in Microsoft to evangelize Change Management internally, allows anyone in Microsoft to use the Prosci® tools and approach internally, allows anyone in Microsoft to evangelize Change Management to customers, and allows Prosci® Change Management Practitioners to use this IP with customers via the Adoption and Change Management portfolio of offers.

Microsoft has certified over 5,000 Change Practitioners globally.

Microsoft has 16 Prosci® Certified Advanced Instructors so far, the largest number of instructors of any company worldwide outside of Prosci®.



**Prosci® ADKAR® Model**

- Awareness**
  - Of the need for change
  - Of the nature of the change
- Desire**
  - To request the change
  - To participate and engage
- Ability**
  - To implement the change
  - To demonstrate performance
- Reinforcement**
  - To sustain the change
  - To build a culture and competence around change

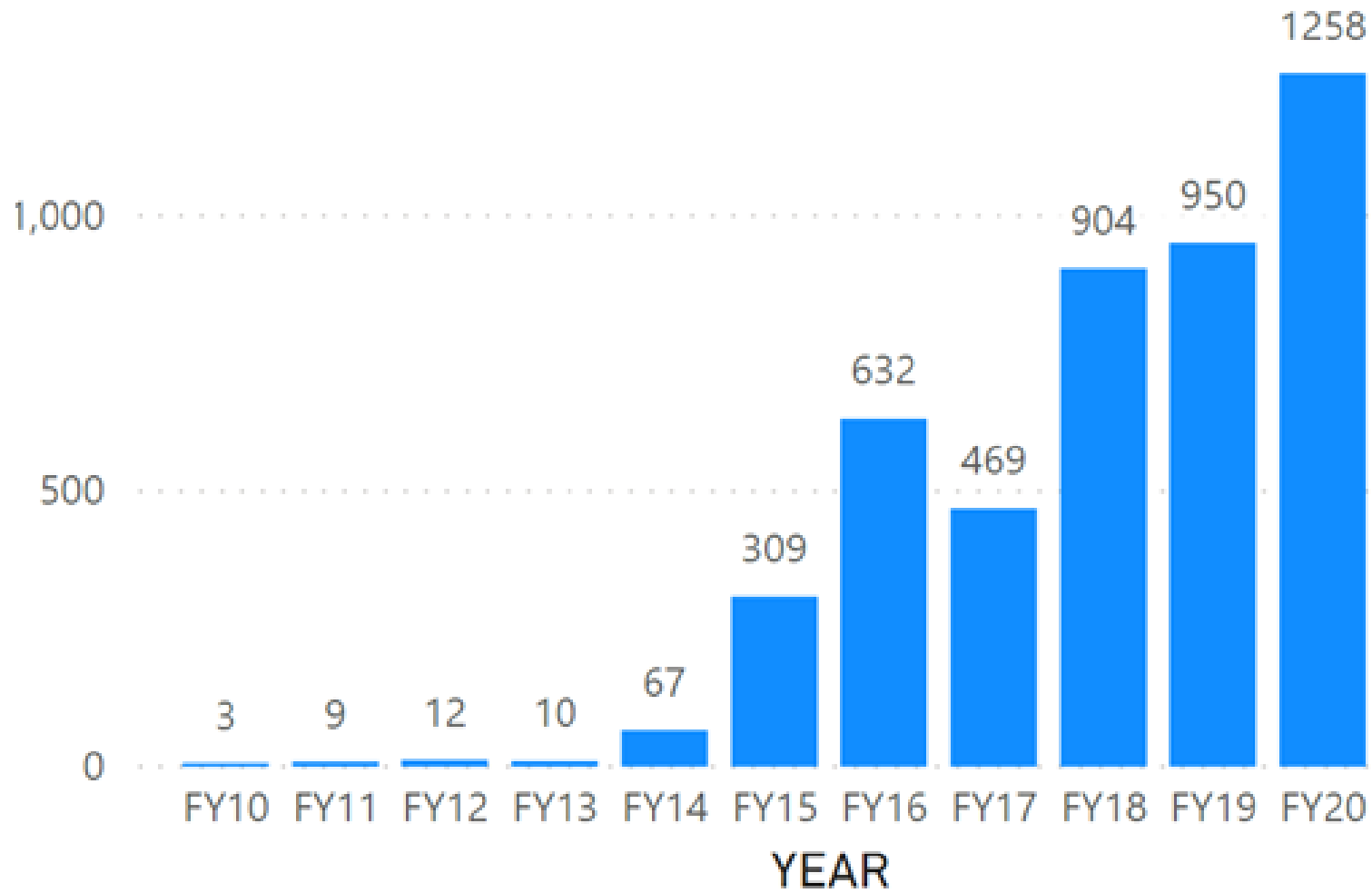
Prosci® IP is supported by Leadership Sponsorship, Project Sponsorship, Project Support, and Change Management. The diagram also shows Project Management and Change Management as foundational elements.

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I am a Microsoft FTE and want to use Prosci's IP externally with Customers and Partners

I am a Microsoft FTE or Vendor and want to use Prosci's IP internally within Microsoft





Training  
momentum



# Building our CMO capabilities





Change Summary

Business Impacts

Field Impacts

Review & Submit

Title:  ▲

Type of Initiative (select all that apply): ▲

- Communication & Newsletters
- Incentives & Contests
- Onboarding & Role Readiness
- Role Enablement
- Compete/CPE
- Marketing & Customer Events
- Process & Regulatory Change
- Systems Change
- Culture & Internal Events
- MSUS Priority Play
- Reporting Change
- Other

Primary Initiative Owner:  ▼ ▲

Secondary Initiative Owner:  ▼

Executive Sponsor:  ▼ ▲

Provide a brief description of the Initiative scope ▲

Format B / U | | | ...

Description of Landing Framework Support Required ▲

Format B / U | | | ...

Requested target release date for initiative comms, readiness, and landing:

📅 ▲ Please select a future date

Request Timeline Details: ▲

Format B / U | | | ...

Attach any supporting documents below:

There is nothing attached.

Attach file



LF ID: 512    Created: 7/5/2020    Created By: John Kelliher    Last Modified: 9/1/2020 4:19 PM    Last Modified By: Jessica Kim

Email me a link directly to this project

Change Triage/Status    **Change Mgmt Plan**    Project Status & KPIs    PROSCI Assessment    Project Governance    Change Council

Activity Name	Landing Modality	Roles - Action	Roles - Awareness	Start/Finish	Status
Cascade	Communication	Account Executive (AE), Customer Success Manager (CSM), Specialist (Modern Workplace), Technical Specialist (MW-Teams),	Account Technology Strategist (ATS), Customer Success Manager (CSM), Customer Success Manager (CSM),	S: 7/26/2020 F: 7/26/2020	
Tech Talks	Readiness - VILT	Customer Success Manager (CSM), Specialist (Modern Workplace), Technical Specialist (MW-Teams),	Customer Success Manager (CSM), Specialist (Modern Workplace), Technical Specialist (MW-Teams), Specialist Manager (Modern Workplace),	S: 7/26/2020 F: 8/16/2020	
Champs Kickoff	Readiness - VILT	Customer Success Manager (CSM), Customer Success Manager (CSM), Manager, Specialist (MW-MS Managed),		S: 7/26/2020 F: 7/30/2020	
Fast Five	Fast Five	Account Executive (AE), Customer Success Manager (CSM), Technical Specialist (MW-Teams), Specialist (MW-MS Managed),		S: 8/2/2020 F: 8/2/2020	
MCD Office Hours	Office Hours / Support	Account Executive (AE), Customer Success Manager (CSM), Specialist (Modern Workplace), Technical Specialist (MW-Teams),	Technology Strategist (ATS), Customer Success Manager (CSM), Manager, Specialist (Modern Workplace), Technical Specialist (MW-Teams),	S: 8/9/2020 F: 12/20/2020	
MCD Manager Pack - Managers Only	Manager Packet - Mgr	Account Team Unit (ATU) Manager, Customer Success Manager (CSM), Manager, Specialist (Modern Workplace),		S: 8/10/2020 F: 8/10/2020	
Zoom Compete Offer	Manager Packet - Mgr	Account Team Unit (ATU) Manager, Customer Success Manager (CSM), Manager, Specialist (Modern Workplace),		S: 8/11/2020 F: 8/11/2020	

\* Task Name

Sponsor Email Cascade

Task Description

send an email to field outlining the goals of the MCD program

Roles Action

Select All Roles

Account Team Unit (ATU) Manager

Roles Awareness

Select All Roles

7 items

Landing Modality

Targeted Communication

Start Date

7/26/2020

Finish Date

7/26/2020

Task Status

In Progress

Impact Hours (Baseline)

0.25

Impact Hours (Actual)

0.25

Weekly News Week

Manager Pack Month

WN / MP Status

Task Owner

Find People

Task Change Manager

Find items

Weekly News / Manager Packet Comments:

Delete Task

Save Task

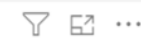
New Task

Back

Edit

## Select Project Originator

- ATO
- Azure
- BizApps
- BSO
- CDO
- CMO
- Compete
- Cross-Collab
- FED
- L&R
- MCS
- MW+S



## Report Slicers

### Fiscal Year Data

- FY19
- FY20
- FY21

### Change State

- Select All
- Active
- Complete
- New

### Prosci Impact Level

- Select All
- (Blank)
- High
- Low
- Medium

### Impacted Role(s)

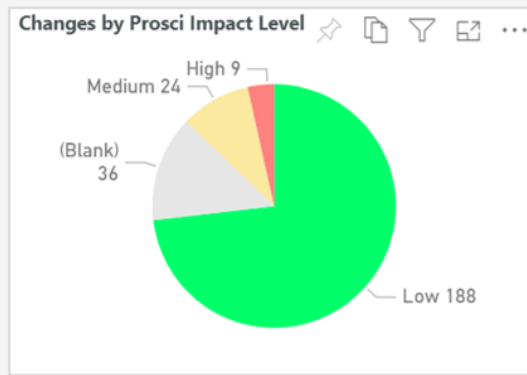
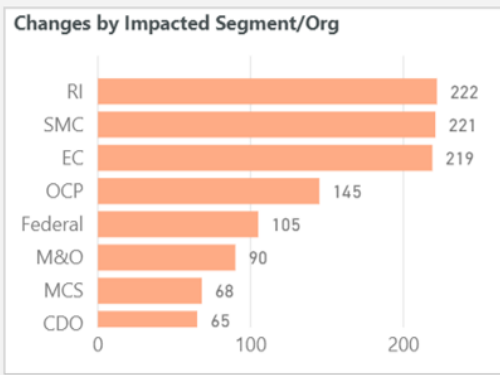
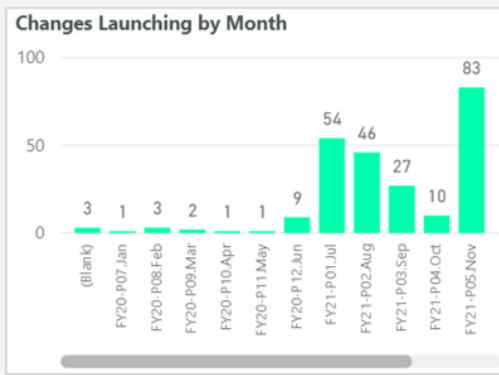
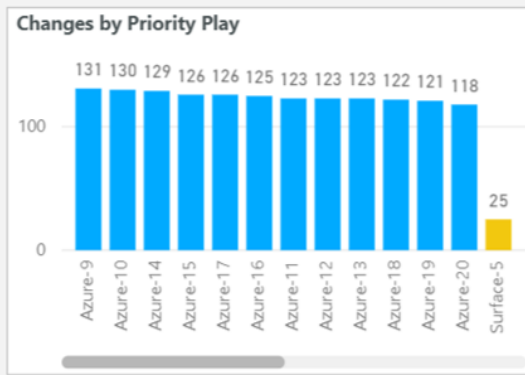
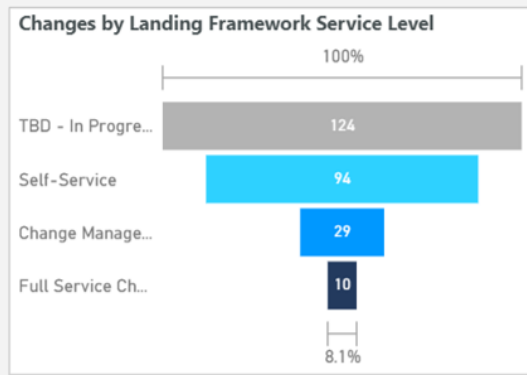
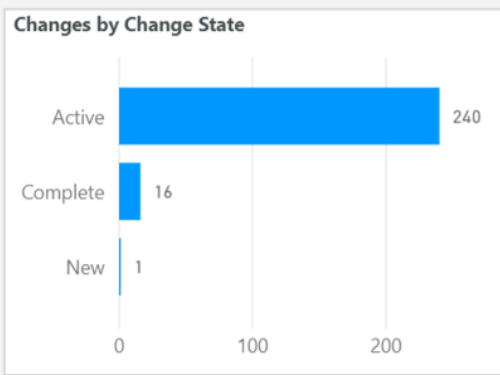
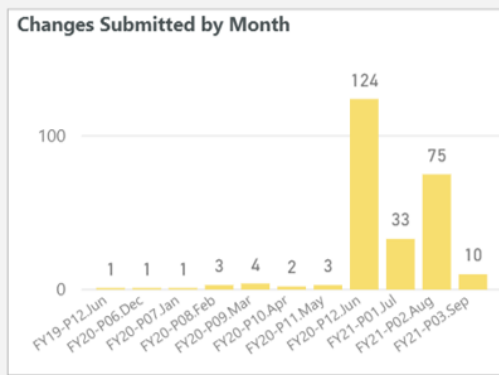
- Select All
- (Blank)
- ATU
- CSU
- M&O
- MCS
- OCP
- Other
- Sales Excellence
- Services
- CMC

### Launch Date

- (Blank)
- FY20
- FY21
- FY21-Q1
- FY21-Q2
- FY21-Q3
- FY21-Q4

### Project Originator (MSUS Team)

- Select All
- ATO
- Azure
- BizApps
- BSO



Change Title	Change State	Project Description	Launch Date	Success Measures
Industry Case Studies	Active	Working with CMO to build case studies and amplify through marketing demand gen engines. Collecting portfolio of customer wins aligned to IPS to aid in seller conversations. (note: already given the go-ahead through VRB)	11/1/2020	Seismic click-through, Pipeline Acceleration
3DM App Campaign	Active	Why modernize web apps are important for exec levels	11/1/2020	
ACA Hunter Readiness	Complete	Week of Readiness for EC/RI ACA Hunters	7/27/2020	Engagement with community
US OSS Virtual Summit	Active	We want to deliver a virtual educational summit for the US and Canada regions. The topics will focus on Open Source technologies (Linux infrastructure, App Dev on OSS Databases, Migration onto Azure etc.) from Microsoft and our partners. This event is similar to the successful one executed by the EU team in June 2020.	11/1/2020	Number of attendees, number of leads
Ninja Warrior for Specialist with WW	Active	We need to go back and review the WW Ninja specialist initiative and ensure we have the right support in the US. We need to be able to consume the specialist performance data, create communications and provide prices. The WW ninja does	8/1/2020	

### Select Impacted Orgs

ATU
  CSU
  STU

### Select Project Originator

ATO
  Azure
  BizApps
  BSO
  CDO
  CMO
  Compete
  Cross-Collab
  L&R
  MW+S
  OCP
  Other

### Report Slicers

#### Fiscal Year Data

(Blank)  
 FY20  
 FY21

#### Impacted Role(s)

(Blank)  
 ATU  
 CSU  
 M&O  
 MCS  
 OCP  
 Other  
 Sales Excellence  
 Services  
 SMC  
 STU

#### Launch Date

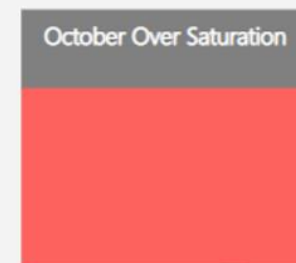
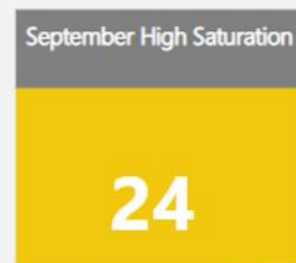
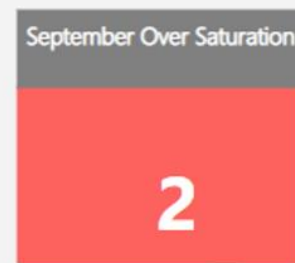
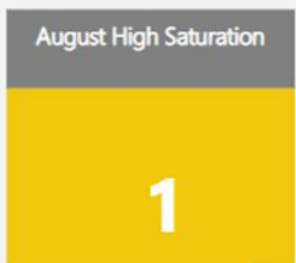
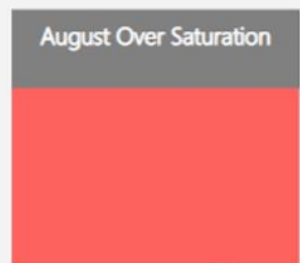
FY21

#### Project Originator (MSUS Team)

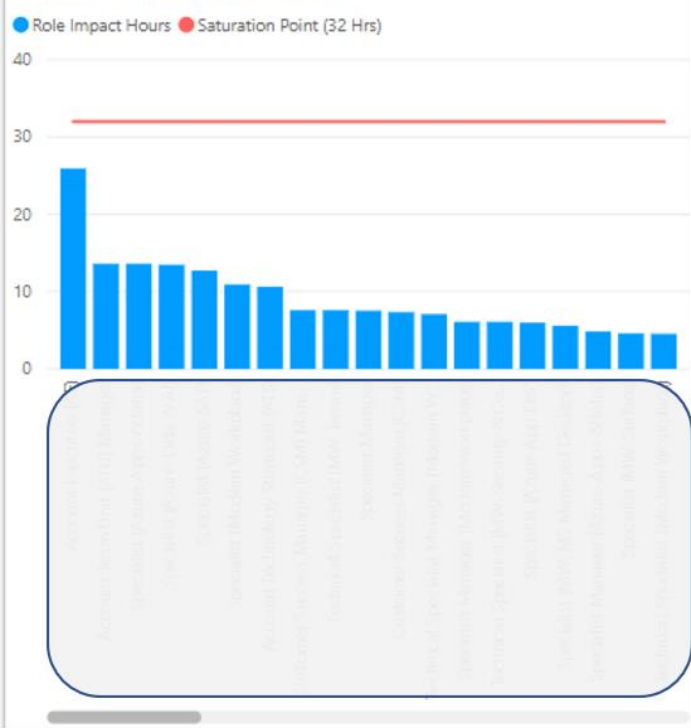
Select All  
 ATO  
 Azure  
 BizApps  
 BSO  
 CDO  
 CMO  
 Compete  
 Cross-Collab  
 L&R  
 MW+S

#### Landing Activity Modality Type

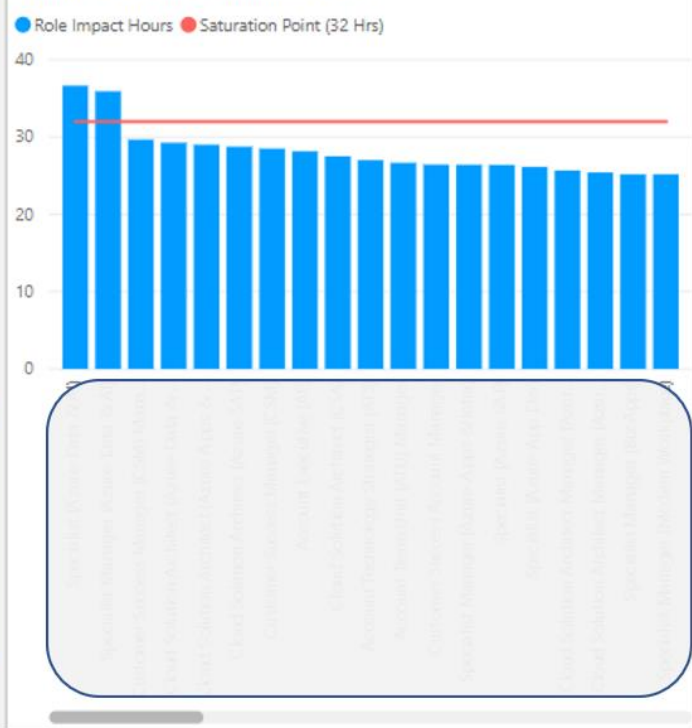
Select All  
 Community Call



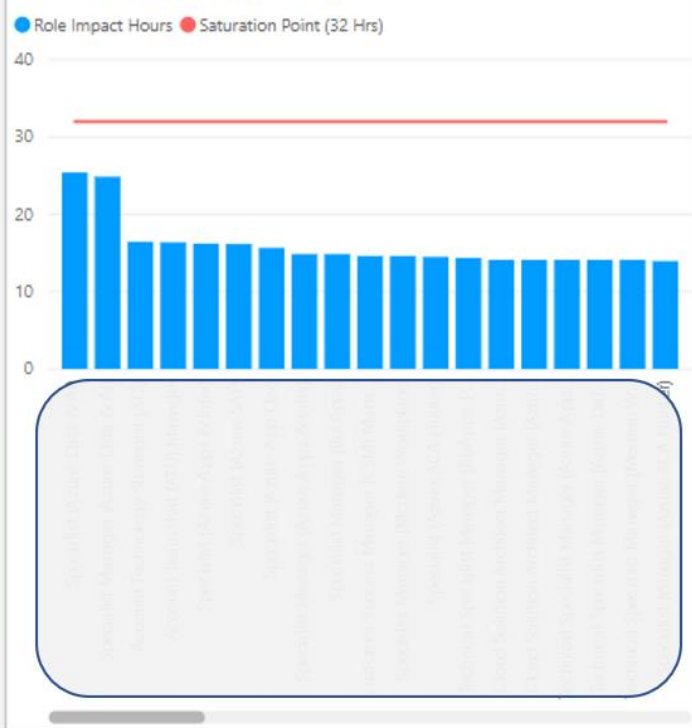
#### August 2020 Monthly Impact Hours



#### September 2020 Monthly Impact Hours



#### October 2020 Monthly Impact Hours



Role Title	FY21-P03.Sep
Specialist (Azure) Data & AP	26.55

Role Title	FY21-P03.Sep
Specialist (Azure) Data & AP	26.55

Role Title	FY21-P03.Sep
Specialist (Azure) Data & AP	26.55



For customers

# Portfolio



**Getting started**

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**Explore & focus**

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**Comprehensive  
services**

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**Ongoing  
support**

---



For partners

# Example – Adatum Case Study

**Common approach**  
User focus is an afterthought. Rather than engaging users in the process, an email containing a link to training, for example, is sent post-deployment.

**Ideal approach**  
User adoption is a parallel, integrated work stream that includes deployment.

**Change Management Framework**

The Change Management Framework for Partners offers a simplified change-management approach, tailored for partners like you who help to drive Office 365 customer adoption. The plan included in the framework applies to the people who lead the change and to those who'll be affected by the change and the new ways of working they need to adopt.

- Adoption and Change Management webinar recording
- Adoption and Change Management webinar presentation

## Stakeholder engagement plan

The key to a successful adoption is to create a dynamic team of committed individuals – or change network – made up of sponsors, ambassadors, and change agents who represent a cross-section of your customer organization and who can drive and affect change in other staff. Key team members include:

- Sponsors:** Top leaders within the organization. Their participation is essential to driving employee adoption. Key leaders have the greatest influence on company culture and can actively communicate the rationale for and the value and benefits of a new technology and new ways of working throughout the organization.
  - Active involvement in the project: 2 hours per month
  - Target: 1-3 executives
- Ambassadors:** In most organizations, directors or vice presidents who obtain and encourage staff to engage or function to engage in the change.
  - Active involvement in project: 1 hour per month
  - Target: 3-10 director level or above staff

Getting buy-in from every user across an organization is a challenge. Broad engagement from the change network will help address the adoption challenge.

**Resources:**

- Adatum Corporation Stakeholder Engagement Plan
- Adatum Corporation Stakeholder Engagement Plan - Background to Roles and Responsibilities
- Office 365 Adoption: Identify Key Stakeholders Guide
- Office 365 Adoption: Build a Change Management Guide

First Line Worker

Office 365

**A DAY IN A LIFE**

- 8:30am:** Minimal work-related activity
- 9:00am:** Schedule for the day/shift. New requests. Urgent tasks
- 9:30am:** Responding to customer/client enquiries. Review company bulletins and announcements
- 10:30am:** Responding to customer/client enquiries. Reviewing updated product/change information from suppliers
- 3:30pm:** Closing down and tasks for the day. Minimal work-related activities

**DEVICE NEEDS**

Current Technology: [Icons for various devices and apps]

Desired Future Technology: [Icons for various devices and apps]

**CAPABILITY NEEDS**

- Document Creation
- Real-time Communication
- Collaboration
- Finding Information & People
- LOB Applications
- Reporting & Analytics

**KEY SCENARIOS**

- Smarter Meetings
- Communication & Community
- Work from Anywhere
- Training & Onboarding
- Discover People & Content
- Team Collaboration
- Schedule and Task Management

## Smarter Meetings

Provide productive, engaging and valuable meeting experiences.

Office 365

**Behavioral Changes**

**Start**

- The Group Notebook/OneDrive is the primary shared source of information to a meeting
- Canceling meeting slots that are not needed anymore
- Pre-up meetings rooms that are no longer needed
- Use video/where appropriate as much as possible to make the meeting experience an interactive one
- Assigning actions through Groups/Planner

**Stop**

- Sending emails with meeting-relevant information
- Storing content on your local computer or in email
- Requiring everyone to be in the room at the same time for a meeting
- Stop the availability of meetings rooms delaying the holding of a meeting
- Neglecting video opportunities

**Continue**

- Setting up meetings for virtual participation being prepared for the meeting
- Using guidelines and participation defined and communicated in time upfront at the meeting
- Choosing the right meeting setup according to the purpose of the meeting
- Canceling meeting slots that are not required

## Communication plan

Tactic or Phase	Awareness		Service availability		Usage		Adoption
	Weeks before (1-60 days)	Weeks before (1-30 days)	Days before (1-7 days)	Service availability day (1)	Week after (1-7 days)	Month after (1-30 days)	At any time (N+)
Newsletter							
Posters							
First Touch Event							
Brown Bag Sessions							
Early Adopter Video							
Auditorium Training							
Online / On-demand Training							
Lunch and Learn							
Tips and Tricks							
Awards of Incentives and Certifications							
Website							

## Recommended training roadmap

**Core Team**

- Sponsors: Managers, Ambassadors, Change Champions

**IT Preparation**

- Administration course for IT resources
- Formal accreditation

**Auditorium Training**

- Online / On Demand Training
- Brown Bag sessions

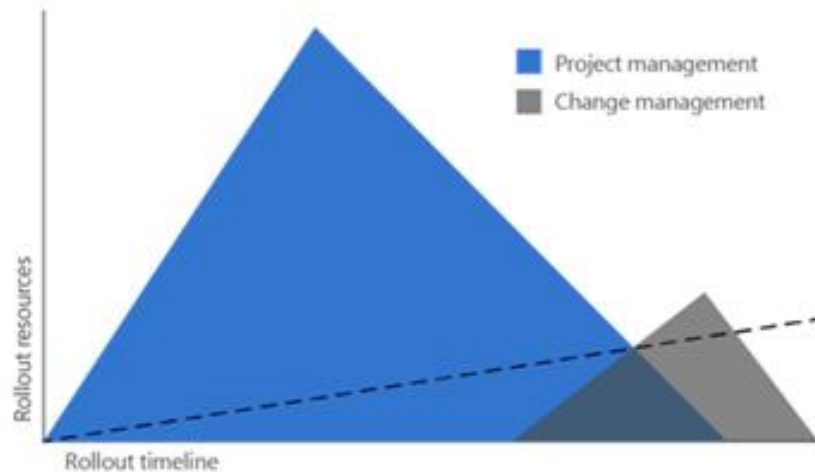
**IT, Sales, Customer Service, Finance etc – Initial introduction**

**Ongoing engagement to end of project**

- Lunch & Learn
- Tips and Tricks

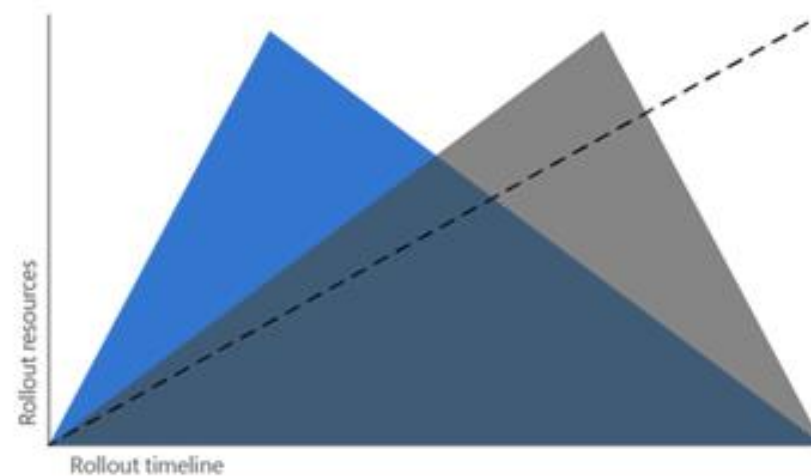
## Common approach

User focus is an afterthought. Rather than engaging users in the process, an email containing a link to training, for example, is sent post-deployment.



## Ideal approach

User adoption is a parallel, integrated work stream that includes deployment.



## Change Management Framework

The Change Management Framework for Partners, offers a simplified change-management approach, tailored for partners like you who help to drive Office 365 customer adoption. The plans included in the framework apply to the people who lead the change and to those who'll be affected by the change and the new ways of working they need to adopt.

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- [Adoption and Change Management webinar presentation](#)

# Stakeholder engagement plan

The key to a successful adoption is to create a dynamic team of committed individuals—or *change network*—made up of sponsors, stakeholders, and change agents who represent a cross-section of your customer’s organization and who can drive and effect change in other staff. Key team members include:

- **Sponsors.** Key leaders within the organization. Their participation is essential to driving employee adoption. Key leaders have the greatest influence on company culture and can actively communicate the rationale for and the value and benefits of a new technology and new ways of working throughout the organization.
  - Active involvement in the project: 2 hours per month
  - Target 4 - 5 executives
- **Ambassadors.** In most organizations, directors or vice presidents who drive and encourage staff in a region or function to engage in the change.
  - Active involvement in project: 4 hours per month
  - Target 5 - 10 director-level or above staff

Gaining buy-in from every user across an organization is a challenge. Broad engagement from the change network will help alleviate this adoption challenge.

## Resources

- [Adatum Corporation Stakeholder Engagement Plan](#)
- [Adatum Corporation Stakeholder Engagement Plan – Background to Roles and Responsibilities](#)
- [Office 365 Adoption: Identify Key Stakeholders Guide](#)
- [Office 365 Adoption: Build A Champion Program Guide](#)

- **Change champions.** Success owners who take responsibility for ensuring individuals use the service, get value from it, and become high performers. Establishing change champions is important to ensure the business goals set for Office 365 are realized. Change champions are knowledgeable, committed to furthering their expertise, and are willing to provide peer coaching and assistance. They help advocate and showcase how Office 365 technology can meet the needs their department and team.
  - Active involvement in the project: 10 hours per month
  - Target 20 - 40 employees at various levels
- **All managers or supervisors.** Lead change with their direct reports. An employee’s direct supervisor is crucial in delivering the most personal messages for that employee.
  - Active involvement in the project: 4 hours per month
  - Target all staff managers

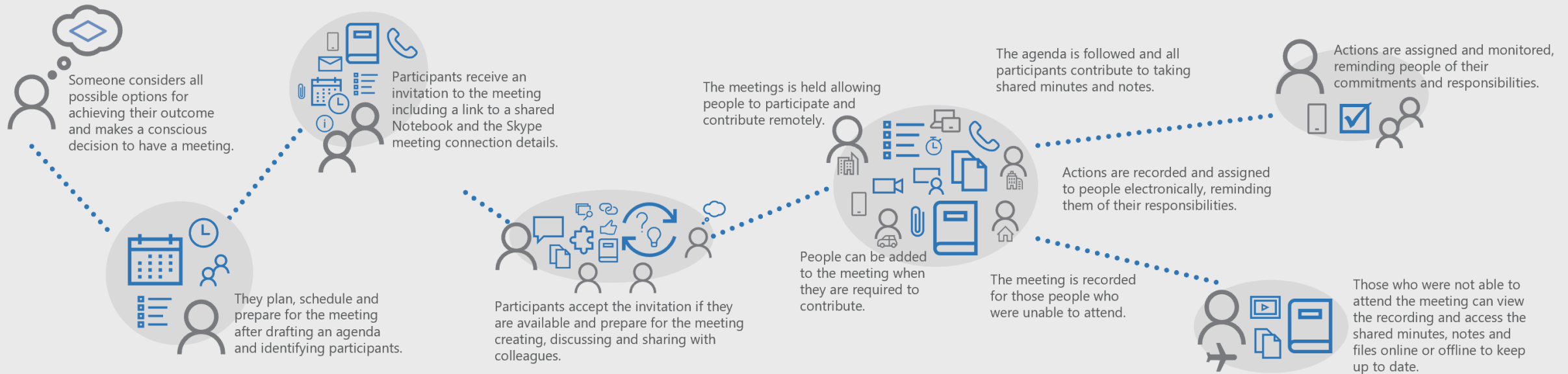


# Communication plan

Tactic or Phase	Awareness			Availability	Usage		Adoption	
	Weeks before (t-60 days)	Weeks before (t-30 days)	Days before (t-7 days)	Service availability day (t)	Week after (t+7 days)	Month after (t+30 days)	At any time (t~)	
Newsletter	◆	◆			◆	◆	◆ ◆	
Posters		■						
First Touch Event		◆						
Brown Bag Sessions			◆		◆	◆ ◆		
Early Adopter Video				◆				
Auditorium Training			◆ ◆					
Online / On-demand Training			■					
Lunch and Learn			■					
Tips and Tricks				◆				
Awards or Incentives and Certifications				■				
Website		■						

# Smarter Meetings

Provide productive, engaging and valuable meeting experiences.



## Behavioral Changes

A meeting requires a purpose and agenda. We reduce the number and length of meetings and more effectively work together in between meetings.

We use a joint notebook to prepare, conduct and follow up meetings. We allow and encourage people to participate and contribute remotely. We respect other peoples time and accept or decline meeting invitations promptly. We differentiate between people who are required and optional.

### Start

- ✓ The Group Notebook/OneDrive is the primary shared source of information for a meeting
- ✓ Cancelling meeting slots that are not needed anymore
- ✓ Free up meeting rooms that are no longer needed
- ✓ Use video (where appropriate) as much as possible to make the meeting experience an interactive one
- ✓ Assigning actions through Groups/Planner.

### Stop

- ✗ Sending emails with meeting-relevant information
- ✗ Storing content on your local computer or in emails.
- ✗ Requiring everyone to be in the room at the same time for a meeting.
- ✗ Stop the availability of meetings rooms delaying the holding of a meeting.
- ✗ Neglecting video opportunities

### Continue

- ✓ Setting up meetings for virtual participation
- ✓ Being prepared for the meeting
- ✓ Having objectives and participation defined and communicated in time, upfront at the meeting
- ✓ Choosing the right meeting setup according to the purpose of the meeting
- ✓ Cancelling meeting slots that are not required

# First Line Worker



## A DAY IN A LIFE

<p><b>6:30am</b></p> <p>Minimal work related activity.</p>	<p><b>9:00am</b></p> <p>Schedule for the day/shift</p> <p>New requests</p> <p>Urgent tasks</p>	<p><b>12:00pm</b></p> <p>Responding to customer/client enquiries</p> <p>Review company bulletins and announcements</p>	<p><b>2:00pm</b></p> <p>Responding to customer/client enquiries</p> <p>Reviewing updated product/service information from suppliers</p>	<p><b>5:30pm</b></p> <p>Closing issues and tasks for the day</p> <p>Minimal work related activities.</p>
------------------------------------------------------------	------------------------------------------------------------------------------------------------	------------------------------------------------------------------------------------------------------------------------	-----------------------------------------------------------------------------------------------------------------------------------------	----------------------------------------------------------------------------------------------------------

## DEVICE NEEDS

### Current Technology

Mobile	Smartphone	Desk Phone	Headset	Desktop	Laptop	Hybrid
Tablet	Webcam	Dual Screen	Pad and Pen	Stylus	Windows to go	Shared Kiosk

### Desired Future Technology

Mobile	Smartphone	Desk Phone	Headset	Desktop	Laptop	Hybrid
Tablet	Webcam	Dual Screen	Pad and Pen	Stylus	Windows to go	Shared Kiosk

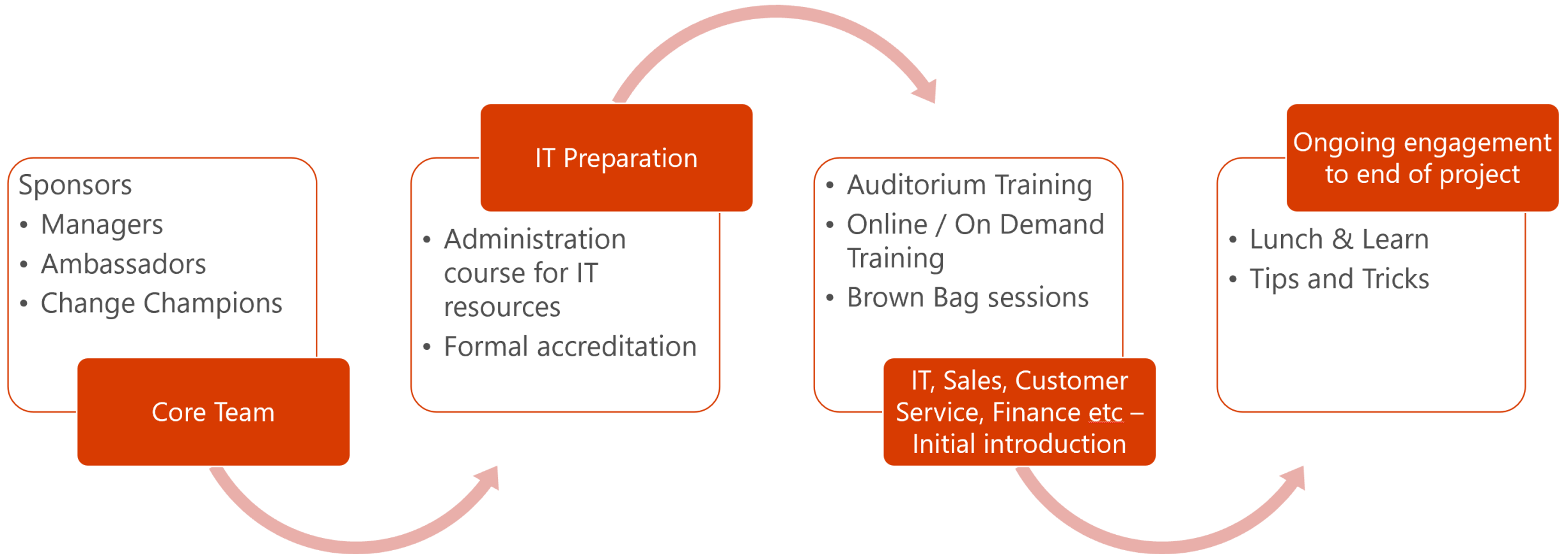
## CAPABILITY NEEDS

<b>Document Creation</b>	
<b>Real-time Communication</b>	
<b>Collaboration</b>	
<b>Finding Information &amp; People</b>	
<b>LOB Applications</b>	
<b>Reporting &amp; Analytics</b>	

## KEY SCENARIOS

1. Smarter Meetings	X
2. Communication & Community	
3. Work from Anywhere	
4. Training & Onboarding	
5. Discover People & Content	
6. Team Collaboration	
7. Schedule and Task Management	X

# Recommended training roadmap





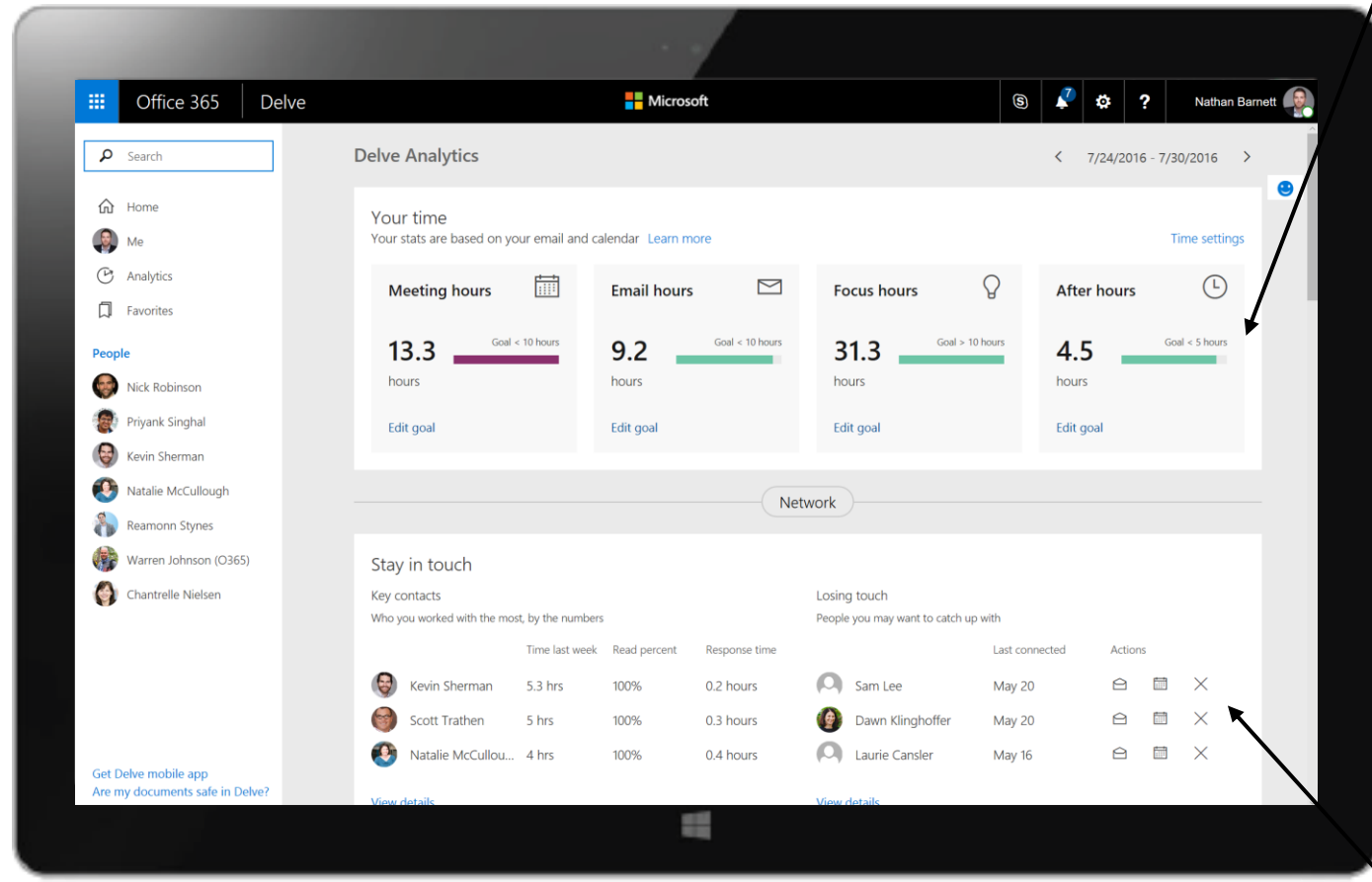
Technology: an enabler for CM?

# Personal Dashboard

Transforming employee productivity and satisfaction with small data

Gain insights into how you spend your time at work

Understand your top connections and recent interactions



Direct feedback about time use...

Set and track goals to improve how you use your time

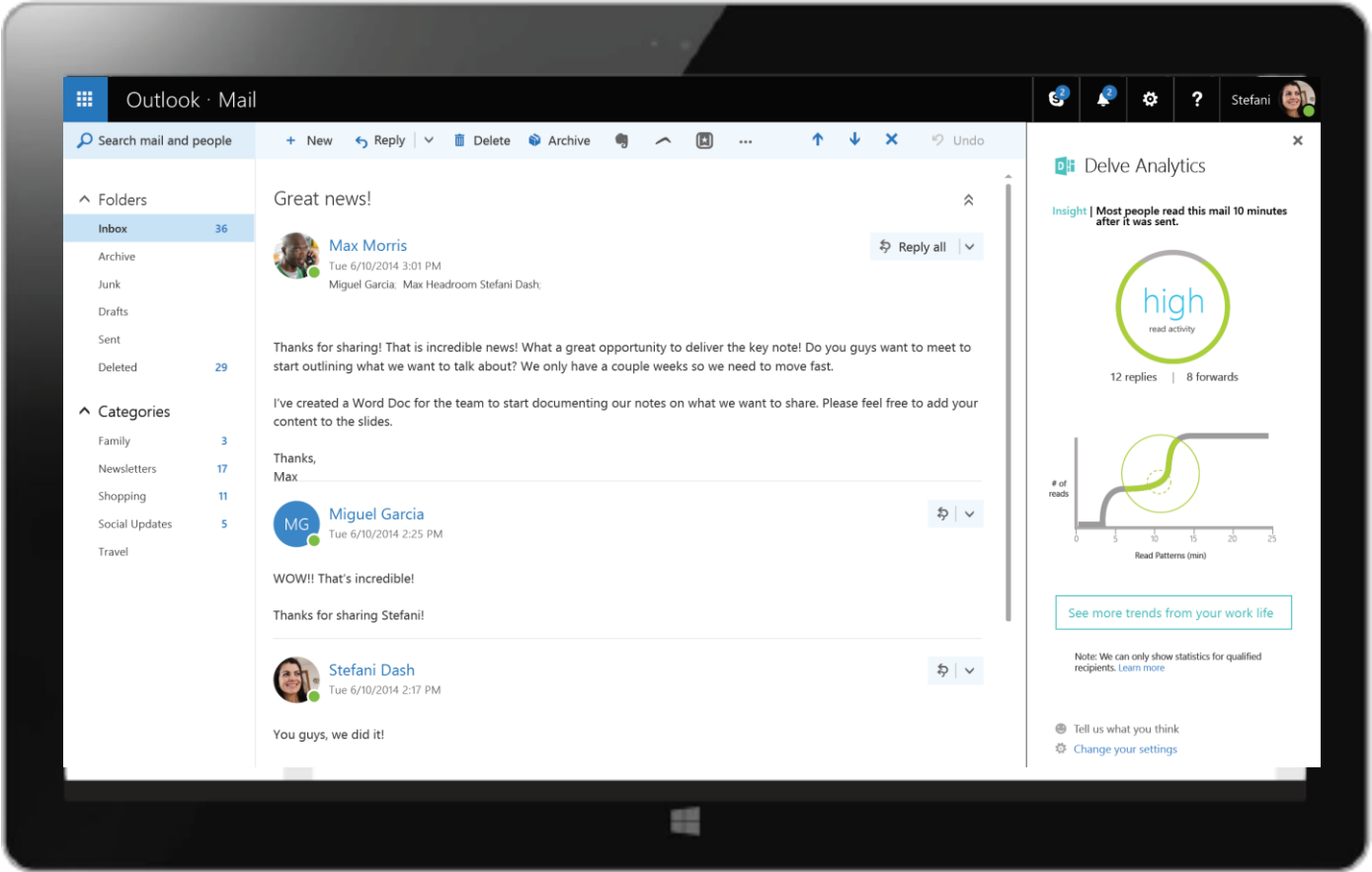
Add your important contacts to stay up to date

and relationships.

# Outlook Add-in

Contextual  
MyAnalytics  
experience directly  
in Outlook

Email  
relationships  
and response  
times



Improve reach and  
impact of  
communications

# Weekly Digest

Weekly digest to keep time use top of mind

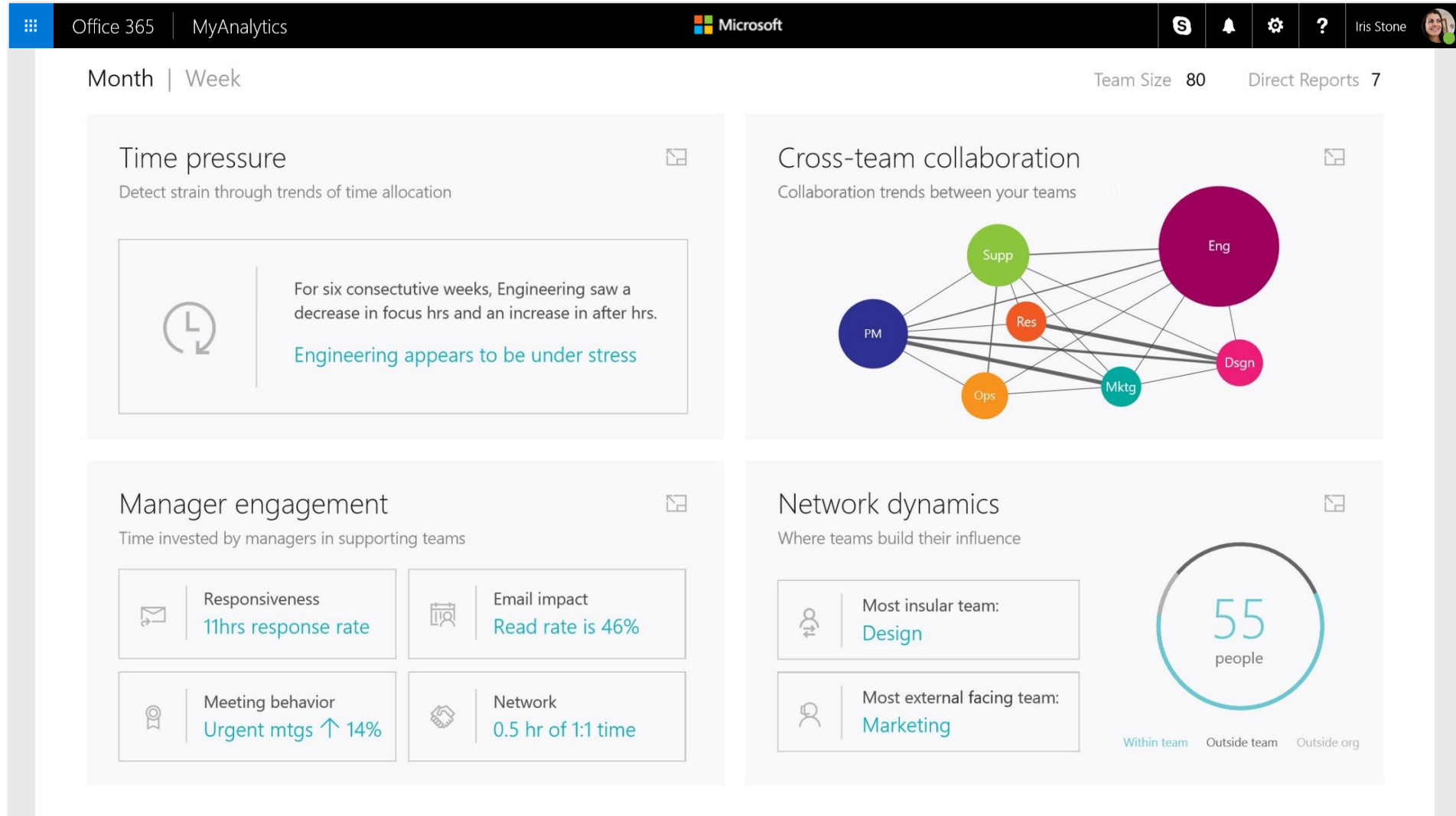
Feedback on goals

The screenshot displays the Outlook Mail interface with a weekly digest. The interface includes a search bar, a folder list on the left, and a main content area. The main content area features a 'Last week's stats' section with four progress bars: Email Hours (8/10), Focus Hours (13/10), Meeting Hours (8/20), and another Email Hours (2/5). Below this is a section for 'Get stats on any email message' and a large banner for 'Delve Analytics' with the text 'Because how you spend your time is how you spend your life.' and a 'See more stats' link.

Category	Current	Goal
Email Hours	8	10
Focus Hours	13	10
Meeting Hours	8	20
Email Hours	2	5

Suggestions on how to improve your time

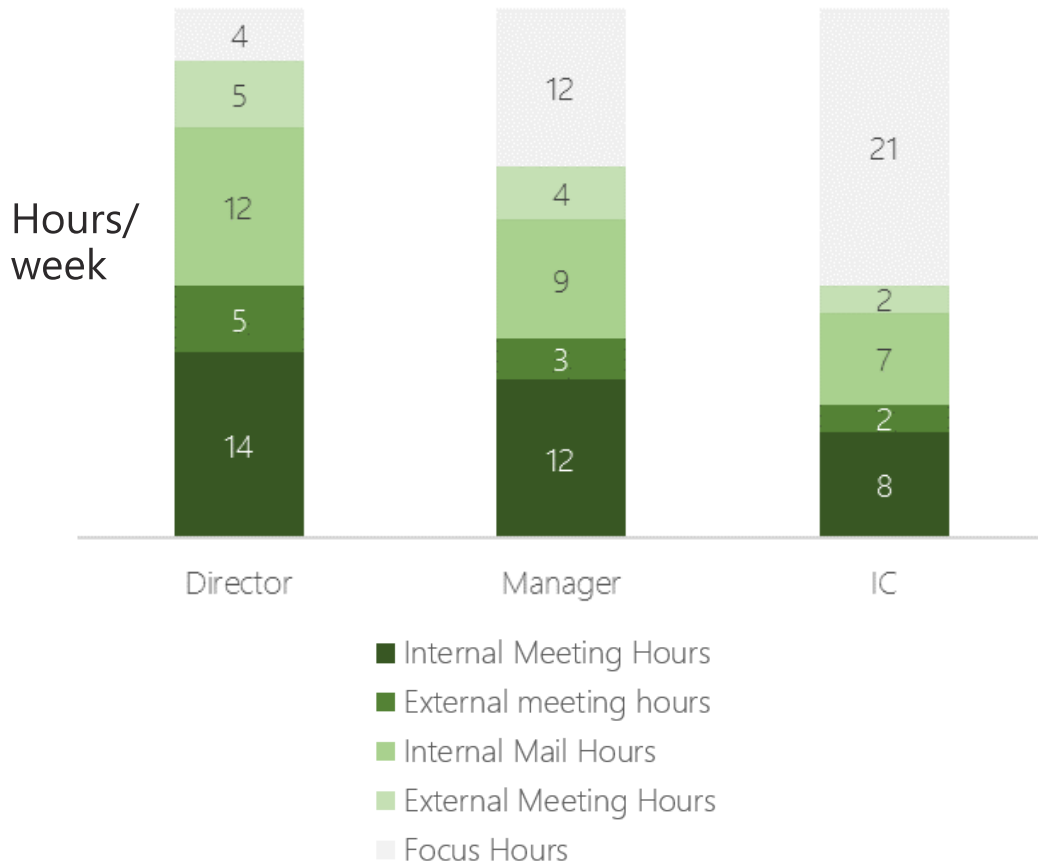
# MyAnalytics – Manager view (sneak peek)



# Workplace analytics metrics

help organizations understand how people spend their time

How is Finance spending its 40-hour work week?



Who is Finance spending its time with?

		Finance		
		Director	Manager	IC
% of collaboration time	Finance	40%	50%	75%
	Corporate	25%	20%	5%
	HR	15%	10%	5%
	IT	10%	5%	5%
	Legal	10%	10%	5%
	Other	0%	5%	5%

Finance ICs are spending 5% of their collaboration time with Legal



Q&A

**Thank you**