

Unified Communications Project: Final Presentation

Prepared by the SDCOE Enterprise
Project Management Office (EPMO)

Peyri Herrera, Flora Pourzamani, Reesa Fickett, and Candace Wong

SEPTEMBER 24, 2020



Imagine a day... where all SDCOE employees access chat, video conferencing, phone calls, voicemail, and document sharing, **all from one application** within our Microsoft ecosystem.

That day has arrived!

The ITS Division implemented Microsoft Teams, SDCOE's one-stop shop for unified communications and collaboration, plus a new way to make phone calls.





Who was involved in this project?

- Terry Loftus - Project Sponsor
- ITS Leadership - Steering Committee
- Network Team - Planning, licensing, provisioning, installing phones, support, working with vendor
- EPMO - Project management, planning, training, documentation, website
- 9 division reps - Advisory Team
- Computer Support Services (CSS) - Support for end users
- Andy Quintana - Training Team + Daily Office Hours
- 2 ITS staff - Training Team
- Stacy Brandt - Communications
- Media & Creative Services - Support
- NTT and NuWave - Vendors
- All SDCOE employees, plus customers/students/partners - Stakeholders



The 4 components of this project

- Software
- Desk Phones
- Governance
- Organizational Change Management

Phase 1

- April 13 - May 1
- Early Adopters (150 employees)

Phase 2

- May 4 - June 5
- Rolled out all functions but Teams (1300 employees)

Phase 3

- June 8 - July 10
- Rolled out Teams (1600 employees)

Phase 4

- July 1 - TODAY
- Installed new desk phones (up to 1100 phones)

Closeout

- August 24 - September 25



Business Need and Financial Justification

Yes

Strategic solution that will accommodate growth and changing needs



Holistic solution – Part of our Microsoft ecosystem; maximizes existing Microsoft licensing that we already utilize



Lower cost – Saves us money compared to what we were previously spending on our phone systems; reduces operating costs and capital expenses; we can redirect some of those dollars to other endeavors



More secure



Improved communications and collaboration



Requires less time to support, easier to manage; the employee can move and IT generally does not need to intervene with the phone (minimal downtime for the employee)



Cloud-based



Enhanced continuity of operations



Because of WFH, this was an opportune time to leverage the tool



We now pay
\$80,000

ANNUALLY

Instead of
\$240,000

ANNUALLY

Implementation Cost = \$575,000



Objectives/Success Criteria

Upon completion of this project, SDCOE employees will:

- Have access to Microsoft Teams and have a new way to make phone calls
- Know how to access online training materials
- Agree that the training materials were clear and helpful to be able to use Teams and their new phone (either a softphone or desk phone)
- Agree that they find Teams enhances their everyday work (improved collaboration, easier/better way to make phone calls and access voicemail, better usability, enhanced productivity)

SDCOE BOARD GOALS 3 & 4

- **Board Goal 3:** Become the leader and model for innovation, so that SDCOE scales, supports, and develops new opportunities for our schools, districts, and students
- **Board Goal 4:** Maximize human and operational resources to strengthen the organizational culture of SDCOE

ITS GOALS 2 & 3

- **ITS Goal 2 - Deliver Value: Applications & Systems:** Leverage future-facing technologies to deliver resilient and innovative countywide systems and applications
 - **ITS Goal 3 - Improve Division Efficiencies:** Implement next generation processes and automation, design purpose-driven solutions, enable collaboration & build staff capacity
-



Survey Results

29% response rate

ADMIN	INNOV	HR	BUS	LLS	ITS	SSP (includes JCCS)	# of Respondents
9 82%	15 71%	30 83%	39 30%	42 51%	65 61%	91 15%	=291

Overall very positive feedback about the rollout and Microsoft Teams.

- **Training:** The respondents participated in 715 training opportunities (average 2.5 trainings per respondent). 84% found the training materials to be clear and helpful.
- **Information/Communication:** Employees were kept informed about the project in a variety of ways: from the Project Team (including Advisory Team members), co-workers, supervisors, the SDCOE Communications Team, and assistant superintendents or other leadership.
- **Microsoft Teams:** When given 5 statements about Microsoft Teams, 67% agreed or strongly agreed with the statements – and 90% responded Neutral, Agree, or Strongly Agree.



Survey Results

Q3

On a scale of 1-5 (where 5 is Strongly Agree and 1 is Strongly Disagree), to what extent do you agree with these statements that Microsoft Teams improves the way you work?

- A - I have an easier/better way to make phone calls and access voicemail than the old system
- B - I have an easier/better way to communicate with coworkers (1:1 chat, group chat, video calls, voice calls)
- C - I have an easier/better way to work on shared files with others (1:1 chat, group chat, teams)
- D - I have an easier/better way to find and contact other SDCOE employees
- E - I am more productive as a result of Microsoft Teams

Agreement	A Phone/ Voicemail	B Communicate w/Co-Workers	C Shared Files	D Find/Contact Others	E Productivity
5 Strongly Agree	49%	55%	24%	46%	30%
4 Agree	29%	26%	21%	27%	26%
3 Neutral	14%	12%	43%	19%	31%
2 Disagree	4%	3%	7%	3%	8%
1 Strongly Disagree	4%	4%	5%	4%	5%



Survey Results

Q3

On a scale of 1-5 (where 5 is Strongly Agree and 1 is Strongly Disagree), to what extent do you agree with these statements that Microsoft Teams improves the way you work?

	Overall 4s/5s	ITS (65)	HR (30)	ADMIN (9)	SSP (91)	LLS (42)	BUS (39)	INNOV (15)
B - Communicate with Co-Workers	81%	88%	93%	100%	79%	74%	79%	53%
A - Phone/Voicemail	78%	83%	90%	78%	77%	79%	67%	67%
D - Find/Contact Other SDCOE Employees	73%	80%	80%	56%	78%	71%	56%	67%
E - Productivity	56%	77%	70%	56%	51%	48%	36%	40%
C - Shared Files	45%	68%	47%	44%	45%	29%	33%	20%
	MIN	68%	47%	44%	45%	29%	33%	20%
	MAX	88%	93%	100%	79%	79%	79%	67%
	RANGE	20	46	56	34	50	46	47
	AVG	79%	76%	67%	66%	60%	54%	49%

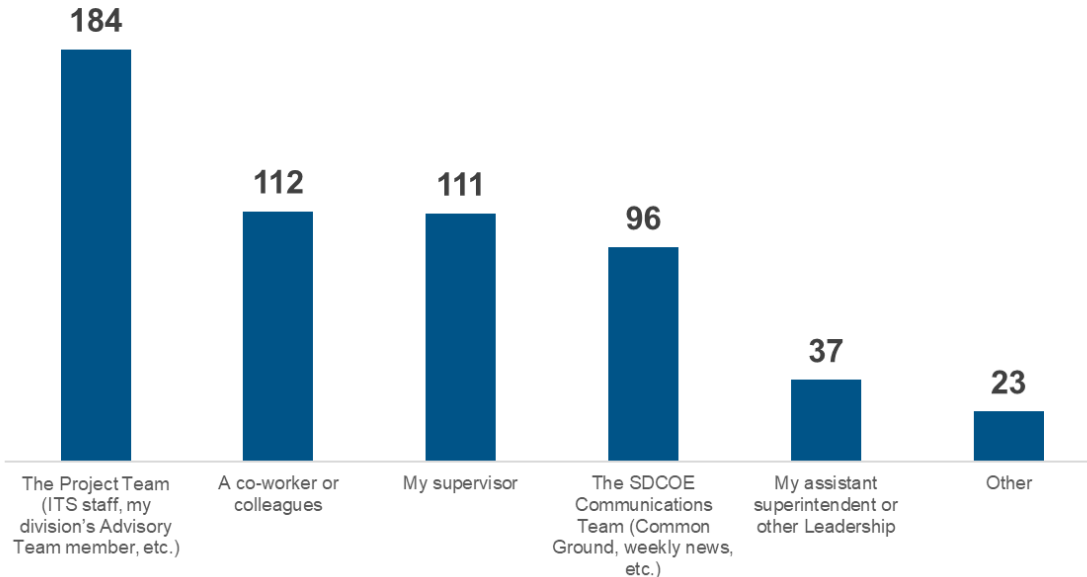


Survey Results

Q6

Who helped keep you “in the know” about the Microsoft Teams rollout, your new work number, and the new way to make phone calls?

Who helped keep you “in the know” about this project?



Overall, 2% had no sources for staying in the know, and 43% had 1 source.

Otherwise, 55% of respondents stayed in the know from 2 or more sources.



Survey Results

Q7

What do you think we did well with this project?

This is in reference to how we rolled out Microsoft Teams (including training and workshops), issued new work numbers, and installed new desk phones.

Q8

Where could we have improved?

Themes for areas of improvement:

- Timing
- Teams Features
- Zoom
- Communication
- Training





Survey Results

- ADMIN - I felt like it was well-planned ahead of time, with nothing last-minute. In fact, I had taken myself through the self-study and changed my phone number and phone message even before we had our live training. That tells me the information was given well in advance.
- BUS - Excellent communication, ample opportunities to learn and ask questions, and having the Olympics as a way to learn.
- HR - I thought it was streamlined and put in place very nicely and I appreciated all the trainings. I like it much better than the phone system we had before.
- INNOV - Loved the structure of support you had- i.e. a champion in each division. The COMET meeting was helpful as an intro and I felt supported having access to other individuals as resources during initial implementation. Kudos!



Survey Results

- ITS - The rollout of the project seemed thought out and strategic. It was presented in a way to prepare for change, training was designed for hands on experience, and follow-up with additional features was a great way to conclude training.
- LLS - Training and communication far in advance. Continuous communication. The Microsoft Teams page in Common Ground is AMAZING!!
- SSP - I think the process was very easy. The rollout was very quick. It allowed more verbal access with our students. The new desk phones are great!



Early Adopters

Teams Olympics

Advisory Team

Live Training in Teams

Workshops

Daily Office Hours

Communications



Early Adopters

Teams Olympics

Advisory Team

Live Training in Teams

Workshops

Daily Office Hours

Communications

We had Early Adopters from April 22 - May 1.

- **106 ITS staff** began using Microsoft Teams and took an interactive approach to learn the new features and functionality and pilot training materials
- **150 JCCS staff** participated in Early Adopter activities to get a head start in learning about Teams
- **9 Advisory Team members** were also Early Adopters to ensure they understood the features and functionality before rolling it out to their divisions

Early Adopters

Teams Olympics

Advisory Team

Live Training in Teams

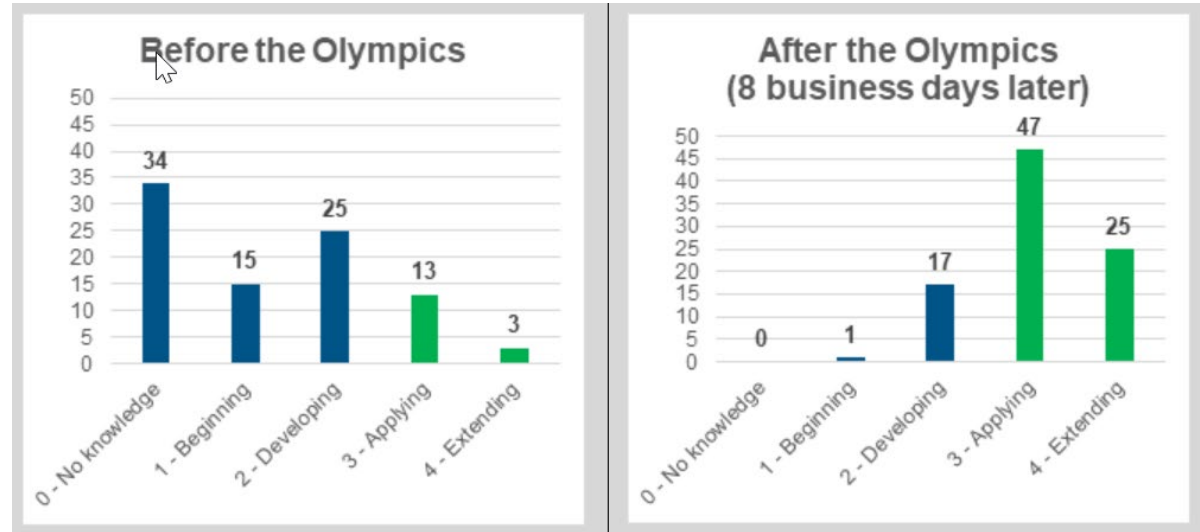
Workshops

Daily Office Hours

Communications



Microsoft Teams Olympics for ITS and RISK allowed small teams to engage in a gamified approach to using Teams and achieve Bronze, Silver, or Gold. After, they received a certificate and an email badge.





*9 out of 9 said
they'd do it again!*

We had an Advisory Team.

- Learned Microsoft Teams before the rest of the organization
- Scheduled department training sessions, collected desk phone requests and headset needs, identified department phone number needs
- Served as the key point of contact for divisions
- Attended bi-weekly meetings and other meetings and workshops as needed
- Led by example – encouraged staff, taught colleagues, and shared tips and tricks with others

Early Adopters

Teams Olympics

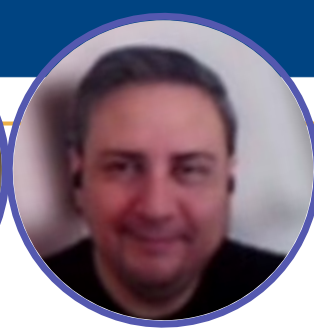
Advisory Team

Live Training in Teams

Workshops

Daily Office Hours

Communications



Early Adopters

Teams Olympics

Advisory Team

Live Training in Teams

Workshops

Daily Office Hours

Communications

We offered live “Intro to Teams” training *in Teams*.

“Intro to Teams” Training

Today we are going to cover the basics to get you started with Microsoft Teams.

1. Calls
2. Voicemail Setup
3. Chat
4. Calendar/Schedule a Teams Meeting
5. Video Call Functions
6. Settings
7. Help Button
8. Mobile App
9. Resources on Common Ground
10. Your Next Steps

Trainer: Andy Quintana
SDCOE Innovation Rep

Housekeeping:

- Use chat and our moderator will read questions aloud
- Raise your hand if you need assistance (if you put it up you must lower it)
- Pre-recorded videos of today’s lessons available
- Job aids and training activities available – **RECOMMENDED**
- Help is a click away! Office Hours M-F from 11-12: Chat Andy Quintana in Teams

May-June 2020:

- **3** Trainers conducted
- **41** one-hour live sessions in Teams for
- **878** employees to get started using Teams

Early Adopters

Teams Olympics

Advisory Team

Live Training in Teams

Workshops

Daily Office Hours

Communications

We conducted workshops and roadshows.

TEAMS FEATURE NOW AVAILABLE BY REQUEST!

Download the guide below for details: "Set Up and Use a Team" PDF

Learn more at the COMET Workshop on Tue, July 21 from 1-2 pm

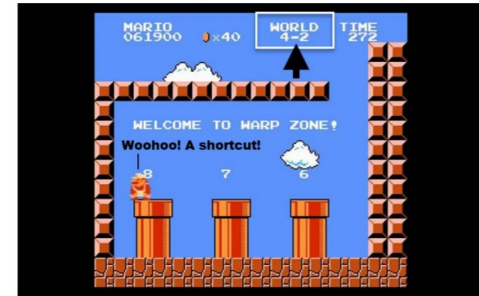
CLICK THIS IMAGE TO DOWNLOAD THE OUTLOOK INVITE

COMET Workshops

- May 12 (Rollout): 95 attendees
- May 20 (Rollout): 38 attendees
- July 21 (Teams): 52 attendees

READY SDCOE PLAYER ONE!

Let's warp to the next level!



"Next Level" Roadshows

- Advisory Team
- ITS Staff
- Admin Assistants
- Recorded and posted online



Early Adopters

Teams Olympics

Advisory Team

Live Training in Teams

Workshops

Daily Office Hours

Communications

We had daily office hours to support employees.

- “Help is a click away! Office Hours are 11:00-12:00 M-F - simply chat Andy Quintana in Teams to initiate assistance”
- Andy answers questions and provides 1 on 1 training on demand
- Facilitated adoption for individuals who need more individualized instruction

Early Adopters

Teams Olympics

Advisory Team

Live Training in Teams

Workshops

Daily Office Hours

Communications

We communicated using nearly every way possible!

- Microsoft Teams page on Common Ground
 - Training Activities (try it!)
 - Job Aids (read it!)
 - Videos (watch it!)
- Common Ground banners
- Communications newsletters: “This Week at Home”, “Inspire”
- Yammer/Twitter
- Advisory Team
- Emails
- Weekly status reports
- UC Project Team used Teams



Lessons Learned

At the conclusion of the project, we conducted Lessons Learned with the following groups:

- Core Project Team: Network/EPMO
- Advisory Team
- Computer Support Services



All responses were analyzed and grouped into three themes:

People, Process, and Technology



Lessons Learned: People

1. Training & Support

- Researched existing material and tailored to SDCOE employees
- Training was comprehensive and a good pace
- Job aids/videos were helpful, easy to access and easy to understand
- 41 training sessions with 878 people
- Tips and Tricks roadshows
- COMET workshops to support managers

2. Communication

- Helpful, precise and clear
- Communication was timely and to the point
- Ease of sharing issues, concerns and solution
- Teams group chats provided opportunity for continuous feedback both directions

3. Early Adopters

- Piloted features and training materials
- Olympic Activities helped learning in a fast pace
- Opportunity to learn while teaching



Lessons Learned: People

4. Advisory Team

- It would not have been as big of an adoption and as fast without them
- Have someone familiar within each division to be the champion
- Appreciation for personal touch/someone familiar with our day to day challenges
- It did not feel like top down ITS dictating

5. Collaboration

- Involving all the teams from beginning (CSS, Network, Training)
- Everyone knew what was happening every step of the way with current information
- Felt included and informed
- Everyone came together and worked as a team, no distinction that we were separate teams



Lessons Learned: Process

1. Planning

- Well planned, managed and coordinated
- Understanding of the scope, timelines and phases
- Communication plan and definition of success
- Weekly Governance meetings
- EPMO team keeping us on track
- Clear picture of overall project, where it is headed and what to expect

2. Rollout

- Very organized rollout/well planned
- Rollout was well constructed with a timeline by weeks
- Clearly defined roles and responsibilities

3. Tools to Manage the Project

- Utilized Monday.com to manage the project
- A Teams group chat was used with the Advisory Team
- A Teams group chat was used with the Core Team
- A Teams team was used to manage shared files



Lessons Learned: Technology/Tasks

1. Tasks

- Teams was easy to learn
- Global adoption of Teams built confidence that it is here to stay
- Phone installations were well tested and executed
- Network staff did a great job of configuration
- CSS was a great help with the phones installation

2. Vendor

- Limited training from NuWave and never got the training promised
- Product was not ready in time as promised
- Microsoft failure to address licensing issue and delayed the project by 2 weeks

3. Challenges

- Aggressive timelines
- Had scope creep but was able to get caught up
- Distant working
- Change management
- Fast pace timelines with phone installation and all Teams features

Successes

- This project provided a great solution to the challenges people have while working from home
- We helped shift our culture
- We have encouraged more employees to get into Office365
- We standardized our phone numbers (new phone numbers) and installed new desk phones
- We retired Skype
- We are a model for districts and COEs

“Would you like me to share my screen?”

“Thanks for dropping your file in the chat, now we can work on it with you.”



“Let’s have a quick Teams meeting!”



Unified Communications
We transformed the way we work and what we think what work is – more collaborative, more efficient, and better use of tools internally and externally.