

PART I

Introduction to Office 365 in Business

CHAPTER 1: Why Consider Office 365?

CHAPTER 2: What is Office 365?



Of Course, This Would Never Happen in Your Business...

A group of employees, meeting somewhere, just yesterday:

"No, Ringo! Not again! We decide something one meeting and then go over it again the next. You're driving me nuts!"

"Katherine, I just think it's important we get this right."

"If that's the case, why don't you come to the meetings?"

"I just missed a couple."

"Including last week's, when we met for two hours and decided to improve the way we're using Twitter."

"But Katherine, Twitter's so old school. Really. We need to foster a community on foursquare. It's so cool, and if ..."

Katherine cuts him off.
"Ringo! We discussed foursquare last week and decided that until we can handle Twitter better, there's no need to go off on another tangent. We talked about this!"

"Not to me."

"But you weren't here! Come on, we'll never make progress like this."

"Ringo, Katherine is right," Adam jumps in to the conversation to reduce the tension, "We did talk about this. Did you get the email?"

"What email?"

"The meeting summary email that Laura sends out each week."

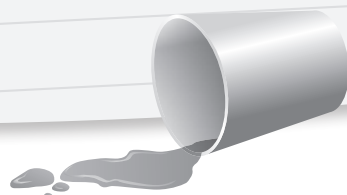
"I got the email but I couldn't download the attachment. Something weird about a virus checker couldn't access a gizmo or something like that..."

In response, the entire team falls silent.

"Look, you guys," Ringo, says, defensively, "I'll be honest. This meeting happens at 9:30 for you but that's 7:30 for me and it's way too early! I understand we discuss important things but I've got kids to get ready for school and a busy-lawyer wife. Sometimes, I just can't do it."

"Yeah, we get that, but we need your input. What are we gonna do?"

It Doesn't Have to Be that Way...





Why Consider Office 365?

THE WORLD DOESN'T NEED ANOTHER version of Microsoft Office. At last count, Word has over 20 toolbars; most of us use 2 or 3. The same goes for Excel and PowerPoint and the rest of the Office programs. Few of us need new versions of Office.

If Office 365 were only that... if it were just another set of 'improved' Office programs, then you could get on with your day, giving Office 365 peripheral attention, at most.

But, it isn't.

Office 365 does contain Office, but it also contains powerful communications and sharing facilities, all hosted by Microsoft in the cloud. We believe this suite of capability can help teams achieve greater success, and dramatically so.

However, if you're if you're not thinking about working in groups, put this book down. You don't need Office 365; use your current version of Office instead.

What Makes Teams Successful?

Because we claim Office 365 can help you make your teams more successful, a good place to start is with the question "What makes for team success?"

Richard Hackman, professor at Harvard, studied teamwork for many years, and his book *Leading Teams*¹ contains many useful concepts and management tips. Hackman says there are three primary criteria for judging team success. We can state them as follows:

- Successful outcome
- Growth in team capability
- Meaningful and satisfying experience

As business professionals, we all strive to achieve the first criteria. A successful outcome means that our team accomplished its goal whether it's solving a problem, making a decision, or creating some work product. Whatever the objective is, we ask "Did we get the job done?" as well as, "Was the success within our time and monetary budgets?"

The other two criteria may surprise you, but read on to see how they make sense.

Growth in Team Capability

Over time, did your team get better? If you're a football fan, you've undoubtedly heard coaches say, "We really improved as the season progressed." (If your team had two wins and 12 losses, you probably didn't hear this.) However, football teams last only a season. For a permanent team—say, a team of customer support personnel—the benefits of team growth are more desirable. Over time, if a team gets better, it is more efficient and thus provides better service for a given cost, or the same service for less cost.

But how does a team get better? For one, it develops better work processes. Activities are combined or eliminated. Linkages are established so that "the left hand knows what the right hand is doing," needs, or can provide. Teams also get better as individuals improve at their tasks. Part of that improvement is due to a learning curve; as someone does something over and over, they get better at it. However, team members also teach task skills and give knowledge to one another. Team members also provide perspectives that other team members need.

Among software developers, for example, it is well-known that a great way to surmount a difficult problem is to describe it to another developer. Often, just the act of describing the problem will provide the perspective needed to solve it.

¹ Richard Hackman. *Leading Teams*. Harvard Press, 2002, p. 30.

Team growth requires team communication. As Hackman points out, effective communication not only involves the communication skills of team members, but also requires that team members have easy and appropriate access to one another. If I know that Maureen can show me how to hide markup in Word, but if I don't have easy access to her, then her knowledge won't benefit me. Easy access, by the way, means that she can *show me*, even if we're not in the same room. Equally important, I need appropriate access. I don't want to bother her with my question in the middle of her annual review, nor do I want to pester Maureen if she's identified someone else on the team to answer questions like mine.

As you'll learn throughout this book, the integration of Microsoft Lync with Office, SharePoint, and Exchange provides unprecedented ease of team member access, in appropriate contexts.

Meaningful and Satisfying Experience

The third element of team success is that team members have a meaningful and satisfying experience. Of course, the nature of team goals is a major factor in making work meaningful. But few of us have the opportunity to develop a life-saving cancer vaccine or safely land a stricken airliner in the middle of the Hudson River in winter. For most of us, it's a matter of making the product, creating the shipment, accounting for the payment, or finding the prospects, etc.

So, in the more mundane world in which most of us live, what makes work meaningful? Hackman cites numerous studies in his book and one common thread is that the work is perceived as meaningful by the team. Keeping prices up-to-date in the product database may not be the most exciting work, but if that task is perceived by the team as important, it will become meaningful.

Well, not quite. If it is perceived as important, and if the person doing that work is known to have done it, then it will be perceived as meaningful. Recognition for work well done is vitally important for a meaningful work experience.

Another aspect of team satisfaction is that illusive feeling of camaraderie. The feeling that one is part of a group of chums; each person doing their own thing, but combining it all to achieve something together, and having fun in the process.

As you'll learn, Office 365 has many features for team communication: Online meetings, whiteboards, team surveys, picture and video libraries, a place for announcements, and much more.

Which brings us to another consideration, what kind of a team is it?

What Kind of a Team Do You Have?

In the olden days—the days of *Mad Men*—everyone worked at the same location at the same time. Meetings were always face-to-face. People came to the office at the same time, took lunch at the same time, and went home more or less at the same time. If you wanted to meet with someone, you walked down the hall to find them, or called them on the office intercom. Clients traveled to their vendors’ sites or vice versa.

Not anymore—or at least, not for most of us anymore. In this flat world, many teams are distributed, international, and multi-cultural. Also, a team of five people can represent five different companies or organizations. In addition, teams can be transitory, or perhaps the team lasts over time, but the composition of team members changes continually; when the project finishes, there is no one left on the team who started 24 months ago.

Table 1-1 shows varieties of ways that teams meet today. In spite of the flat world phenomenon, some teams still work at a single location. But, they may not work at the same time. We use the term *synchronous* to refer to teams that meet and work at the same time; asynchronous means teams work at different times. The traditional, *Mad Men* world is represented in the upper left cell of the table: single-site / synchronous.

TABLE 1-1: Types of Team Meetings Today

	Synchronous	Asynchronous
Single Site	Face-to-face Virtual meetings increasing in popularity	Virtual meeting, same time zone
Multi-site	Virtual meeting required	Virtual meeting, different time zones

Even in this first category, work is changing. While face-to-face meetings are possible with everyone gathered in one place at the same time, they’re not always desirable. Bring all the key players together, maybe requiring expensive, time-consuming travel, and what happens? Start the meeting and the cell phones ring and texting is underway. You can hear the fingers on the keypads. You’ve got everyone in the same room, each listening with one ear while they text their office, solving the burning

issue back home. In this setting, of what value is a face-to-face meeting? Besides, as one busy manager put it, “When we meet virtually, using video conferencing, I can work on my budget when the meeting drags.” OK, meetings aren’t supposed to drag, but sin isn’t supposed to happen, either.

So, today, even when everyone works at the same site, at more or less the same time, virtual meetings using audio and video conferencing are becoming more common, and popular.

Of course, if people don’t meet face-to-face, virtual meetings are mandatory.

PAUSE AND REFLECT: WHAT IS A *VIRTUAL MEETING*?

A virtual meeting is a meeting in which people do not meet in the same room, at the same time. Virtual meetings require, at least, a conference audio call. Also, increasingly, we mean a video conference, one with a shared presentation, shared applications, shared desktops, and a common whiteboard. One in which the virtual audience can be polled.

Virtual meetings don’t have to be synchronous, either. Video presentations and meetings can be saved and played to the audience, at the audience’s convenience. And, when you think about, a discussion forum is a form of virtual meeting; it’s just asynchronous. In this book, we will illustrate numerous ways of using Office 365 to conduct many types of virtual meeting.

Now consider the asynchronous column of Table 1-1. If the meeting is asynchronous, it really doesn’t matter where people are. They can all reside on the same floor of the same building, or they can reside on all the continents of the world. They’re not meeting at the same time, so location isn’t important.

One factor that does vary is time zone. With a multi-site meeting, it’s possible that meeting attendees have the advantage of working in different time zones. Given this, asynchronous meetings can develop a circadian rhythm. Those in Asia participate in, say, a discussion group, followed by those in Europe, followed by those in North America. The conversation continues with the sun around the world.

So, what’s required for effective virtual meetings? Shared audio, shared video, shared resources—all capabilities that are part of Lync, one of the major components of Office 365. Read on to learn how Office 365 can help.

What's the Difference between Cooperation and Collaboration?

Cooperation and collaboration are not the same thing, even though they are sometimes used that way. To better understand why you might want to use Office 365, consider the difference in these terms.

What is Cooperation?

Cooperation involves multiple people working together to accomplish a common goal. Four painters who split a painting job into four pieces, each painting, say, one room wall, are cooperating. They are performing essentially the same work, but they're coordinating their tasks.

Cooperation is effective for reducing the elapsed time required to accomplish a job. However, the result of cooperation is not necessarily better. A room painted by four painters is neither better nor worse than a room done by one painter working alone.

Collaboration, at least as used in this book, is different from cooperation. For us, *collaboration* is a process of group work that involves *feedback* and *iteration*. Someone produces something—say the draft of a report—and other team members review that draft and make comments on it. The original author, or someone else, makes changes to the first draft to produce a second draft. Team members provide feedback on that second draft, and someone produces a third, and so forth. The document moves forward in this sequence of feedback and iteration until the team is satisfied with it.

Collaboration offers the possibility of creating a work product that is better than anyone could do working alone. If the feedback and iteration loops are productive, then the result can far surpass the result of a single individual. One of the great benefits of Office 365, and in particular the SharePoint OnLine component, is that it provides numerous features and functions for improving group feedback and iteration.

ADVICE

By the way, this is not to say that Office 365 isn't useful to cooperating teams. In Chapter 6, we show a potential application for a painting company, in fact. It's just that we think Office 365 truly shines in a collaborative setting.

What Makes for a *Successful* Collaborator?

However, and it's a **big** however, what makes for *successful* collaborator (and therefore successful collaboration and, hopefully, a more successful team)? Studies and surveys indicate that it has nothing to do with being party-manners nice. Nor is it being particularly popular, or experienced, or even well-organized.

The qualities that define a successful collaborator are:

- The ability to give and receive critical feedback
- The ability to express an unpopular opinion
- The willingness to take a reasoned and principled stance

As Darwin John, the world's first CIO once put it, "If two of you have the exact same opinion, then we have no need for one of you."

This situation explains why effective collaboration is so incredibly difficult. We want team members to give and receive critical feedback, to express ideas with which others disagree, perhaps vehemently—while creating a successful outcome, helping the team to gain in capability, and for team members to have a rich and satisfying experience.

Let's see: I want an investment that is guaranteed to provide a 25 percent return, is tax-free, and has no risk. Hello???

But there it is.

Just because the qualities necessary for becoming a successful collaborator are hard to apply, doesn't mean they're not valid and important. This tall order means we need to take every helping hand we can get. Which leads us to:

How Can Office 365 Help?

Office 365 has four major components and dozens of features that facilitate collaboration. The next chapter explains those major components and the ten chapters that follow explore the use of many of the collaboration features. However, without getting into those details, what's the bottom line? How can you use Office 365 to get the job done better, improve your team, create a rich and rewarding experience, and facilitate critical feedback and effective iteration? We think the bottom line comes down to two critical facts:

- Office 365 makes it easier to communicate, both synchronously and asynchronously
- Office 365 makes it easy to share

PAUSE AND REFLECT: WHO NEEDS ANOTHER VERSION OF OFFICE?

When we said at the beginning of this chapter that nobody needs a new version of Office, we may not have been fair. While writing this chapter, one author was writing this section while the other author was editing it for typos. The same copy. Both of us at the same time. Seamlessly.

The Office programs in Office 365, particularly Word, Excel, PowerPoint, and OneNote, include new features and functions to support multi-user, concurrent editing. We overlooked these new features because they don't require anything from us. They just happen.

Easy to Communicate

With Office 365, you can do email, you can do texting, you can make audio calls, and you can make video calls. You can call via the telephone system or via the Internet. You can determine who's available now.

Just a few possibilities: See a task that's overdue? Click the little green square next to the person's name. Voilà, there they are! Find out why the task is late. See a phone number in an email or document? You can click it, and you're on the phone with them.

Maybe you were a little too harsh with your criticism on a particular plan? You can click the green square next to the document and communicate with the plan's author. Want to tell someone their document is the best thing you've ever read? Send them a text with one click! Do you want to integrate team tasks with your personal calendar in Outlook? Easily done.

Easy to Share

You can't give feedback and iteration without sharing.

Ever share documents via email? Of course. What happens when you want to find the version before Don made the change to the first quarter numbers, but after Katherine put in the project justification? Where is that document? To which email is that version attached? Do you still have that email?

Instead of relying on email, you can place your documents in a SharePoint library, part of Office 365, and let it track the versions as well as record version comments and fall back to earlier versions, when needed. Everyone on the team knows where to find the current and past versions.

Want to record who's going to do what and by when? You can put tasks onto the team calendar. Need to make sure that everyone knows about the task scheduling changes? Set an alert on the task list and let Office 365 send an email about the change to everyone on the team—automatically, when the change occurs.

Want to ensure that everyone sees the pictures of the launch party? Or the video of the team award? Put them on the team site.

In short, we believe Office 365 will help teams be more successful, improve their team, and create a positive experience—all the while supporting critical feedback and iteration.

Back to the Meeting...

So there's hope for the group in the meeting that started this chapter. They don't have to meet face-to-face. If it helps, Ringo can meet at home, while he gets the kids ready for school.

They don't even have to meet at the same time. They can create discussion boards, leave notes, conduct surveys, or use many different facilities for meeting asynchronously. That group should be using Office 365!

What's Next?

This chapter describes why the authors think Office 365 can help teams. The next chapter describes the components that make up Office 365 and discusses the importance of cloud-based hosting. After that, Chapters 3 through 12 show you how to use specific Office 365 features to solve common team problems.

Enjoy!