



# Microsoft Teams and Community Platforms: Integration and Collaboration

 **SNAPSHOT**

**SPEAKERS**

Jerry Canaday (MasterCard),  
Katie O'Leary & Mike Yada  
(Thermo Fisher Scientific),  
Lance Yoder (Cerner Corp.)  
and Kelly Schott (TheCR)

**COMPETENCIES**  
Strategy

**MATURITY PHASES**  
CMM1, CMM2, CMM3

## HIGHLIGHTS

1. **Want to know whether or not MS Teams can serve members alongside an existing community platform?** Three panelists weighed in with their thoughts.
2. **Looking for a visual to help users understand the differences between Jive and MS Tools?** Lance shared a slide outlining 5 different tools and their uses. As well, participants shared 2 catchphrases to help people differentiate between the tools.
3. **Curious about how to best roll-out Office 365?** Panelists and participants shared 3 strategies.

## OVERVIEW

- **Background Jerry Canaday.** Jerry is the Digital Workplace Lead for MasterCard. His role is that of a solutions consultant/strategist/planner. He has been in this role for a little over 8 and a half years.
  - MasterCard is a Microsoft shop. As it relates to MS Tools, they have a good idea of how it works. They are strategic partners with Microsoft, so they have views into what's coming down the pipe from Microsoft. As well, they have conversations with Microsoft that involve Non-Disclosure Agreements. They were aware of a number of things before Teams was announced, and are working on Teams now.
  - They are currently migrating over to Office 365.
  - Others on the call may have more knowledge regarding some of the pain points and successes of MS Teams from a real-life stand point. MasterCard isn't there yet, but Jerry has had many conversations with his peers in preparation for using MS Tools.

## OVERVIEW, CONT.

- **Background Katie O'Leary & Mike Yada.** Katie is on the Communications Team and Mike is on the IT side. Both work closely together at Thermo Fisher Scientific.
  - Mike is a Solutions Architect in the Global IT group, which is responsible for the growing of Microsoft Teams.
  - Katie works on their company Intranet, which is built on SharePoint and has Yammer embedded into it. She and Mike are able to give some insight into how a company can have an Intranet environment, a community environment with Yammer and a Teams environment. These environments can complement each other.
  
- **Background Lance Yoder.** Lance is the Manager of Cerner's Workforce Adoption Team. They spend about 50-60% of their time on community management. They had Jive for about 9 years and just recently completed a migration of their employee collaboration over to Office 365. They've had Teams for a couple of years. It was just recently activated and they were able to gain a significant amount of employee adoption.
  - The migration from Jive forced them to be more prescriptive in terms of what they recommended when they used those different tools. They used different use cases for Teams vs. Yammer. SharePoint plays a key role behind the scenes, depending on the use case.
  - SharePoint is good for use with an internal community, i.e. to work with people you work with already. That is the Teams sweet spot in Lance's opinion.
  - Yammer is a good collaboration tool to work with people you may not know, but who share a common interest.

## PANEL Q&A

- **Do you see Teams being able to serve members alongside an existing community platform? Is it an asset or more of a threat?**
  - **Jerry Canaday:** Different people have different views on the function of a community. When Jerry thinks about community, he thinks about open transparency and the way people share in a broader sense as they get together over a common interest or a practice standpoint. There may be a common theme or you may interact with people you know well or you may interact with people you don't know at all. MS Teams and Yammer can coexist because they have different purposes and use cases that drive it.
    - Microsoft uses terms like “Inner Loop and Outer Loop”. The inner loop is your inner circle of people, those people you interact with on a frequent basis. The outer loop is people who you work with who are outside of your every day job, but may be doing similar roles or have similar types of interest. Outer loop has fallen into the community space. Their tool of choice is definitely Yammer. MS Teams is the tool of choice for the inner loop.
      - To explain this in further detail, Jerry stated that Teams plays to the interface of getting work done. When Jerry needs to get people together and get work done in real-time, he works with his Teams interface. This way he can chat, share information and create content together.
      - There is a concept called “Tabs” within Teams. It exists in the browser. When you're in Teams, Tabs is where you can connect with other services both within the MS Stack and in other applications. These are connectors and/or APIs. The concept is to try and create a true one-stop shop for where you go to get work done because now you can actually have an interface into other applications and services that you deal with on a day-to-day basis. Every single team deals in different applications and different content. Each one can create their own more personalized Tab.
      - There is a gallery of connectors that MS has for Tabs. There is also a way to develop your own connectors.
      - When you're sharing information or you're learning from the masses, use Yammer as it mimics the community type concept. Therefore, in Jerry's opinion, they can absolutely coexist.

## PANEL Q&A, CONT.

- **Lance Yoder:** Lance added that the Tabs feature can actually have a link to any website. When you create a Tab, you have the option to put in a URL and ask anything, even if it is for a competitor. Also – not just with Microsoft, but with many companies – sometimes it’s the value of the inter-operability that shines through. Therefore, companies are willing to offer their platforms on a competitor’s platform. Even Slack is working on an app for MS Teams. There is a Tab connect for Yammer, as well.
    - For example, if a product team is building a product, they have to work with other colleagues to build the product and get the work done. However, they also need a channel to share the work about the product or service with a community of people. If you use Tab within Teams, in theory you could interact within Yammer and within Teams directly using the Teams interface. There are always caveats, but the concept is to try and keep you in the interface. That is what Microsoft is continuously trying to build upon.
  - **Mike Yada:** At Thermo Fisher, they use both Confluence and Jira. They do not use them with the integration of Teams at this point. Honestly, they haven’t explored moving any of those environments. There is a Jira plug-in that they just recently enabled within Teams, but otherwise, they haven’t gone down this route.
    - Jerry added that the MS ecosystem has tools that do offer the Agile management type of solution. It’s not nearly as robust as Jira. They are not that far down the road yet, which is part of the value proposition. Companies are already established in their tools for some of these functions, so it’s easier to create connectors for it and create an ecosystem where they are the glue, which is what Microsoft is going after.
- **What is the best way to migrate from Jive to Teams? Does manual or automated work best? Did anyone unveil Microsoft 365 and all its components at once or did they pace it with a release schedule?**
- Lance shared that he works closely with a development team. That team developed a homegrown migration tool. There are tools on the market that work well, but since they had the resources to build a custom tool, they went that route. Their homegrown tool migrated discussions, documents and any non-video files from Jive into a PDF and then into a SharePoint site. People were asked to leave behind what they didn’t use any longer and just start fresh on Yammer. In order to be able to migrate content, the group was required to complete a form that demonstrated a viable business need. Approximately 500 groups were granted permission based on business need.

## PANEL Q&A, CONT.

- One participant shared that at her company, they had a soft rollout of Office 365. They made the tools available, but then didn't properly let everyone know about it. Therefore, this participant makes a point of making a big splash and letting people know of the benefits of these tools. She created 20-minute tutorials that have been very successful. That said, Teams is not being used in replacement of community. The community of practice is on SharePoint 2013 with Chatter integrated. That is very similar to Yammer. They may move over to Yammer, but they are not looking to have Teams replace that because their community managers have found that Teams works very well with a small group of 10-20 people. However, for this participant, their groups are upwards of 2000 people. Therefore, for them, SharePoint and Chatter work better. As a result, they are doing this in parallel. Also, everyone in the company has a WebEx account. Many people have asked if Teams is going to replace it. The plan is to use the Jabber Instance for telephony and dispose of desktop phones, but the CIO only wants to use Jabber for telephony and then use Teams for instant messaging. In this participant's experience, WebEx is much better for large calls and for training vs. Teams.
- Jerry said that he can't emphasize enough that the Office 365 Suite of services and tools is a beast to understand and know. The key that you need to understand is that there is so much interconnectivity between these tools that making a decision to only enable one or two tools has implications. Certain features and functionalities will disappear or won't work properly if One Drive is not enabled or if SharePoint isn't enabled, etc. Be aware of this when you are planning.
  - Some companies release the various functions in waves. They are getting all of the functionality out to the users at one time, but they are not enabling it for everyone at one time. This allows them to at least understand some of the impacts and challenges and questions that surface so that they can continuously improve for the release of the next wave. They can also do some consulting services from an end-user change management perspective. It's always easier to do that kind of thing when you enable it for 500 people vs. 20,000 people.
  - Mike agreed and added that it's important to pick the workloads that will be meaningful and relevant and help the business to achieve their goals and overcome challenges. Then slowly roll-out the other workloads. Perhaps leave some of them for serendipitous discovery. Your early adopters will be curious and you want to embrace that, but don't tell everyone about all of the apps all at once. You'll just have the 'deer in the headlights' look from your audience.

## BEST PRACTICES

- **Know the benefits and limitations of MS Teams.** Mike shared that Teams has many benefits. There is the collaboration aspect, the conversations, the Tabs, the integrations, etc. All of those functions have been working well for Thermo Fisher. However, there is another side of it. For example, it presents challenges as a WebEx replacement or for use as a telephony tool. It just doesn't work. It requires some intervention or configuration at a network level. At Thermo Fisher, they are promoting Teams from a collaboration perspective, but they are not promoting the meetings perspective yet because they are still a WebEx shop. They are not embracing the telephony features of Teams yet either because they are not ready. You can pick and choose your workloads by disabling the meetings feature entirely.
- **Find ways to help people know which tool to use.** One participant shared how her previous company portrayed the differences between SharePoint and Jive to help their users know which tool to use and when to use it.
  - SharePoint is the filing cabinet and Jive is the conference room table.
  - Another catchphrase shared was Yammer is the place to network and Teams is the place where teams work.
- **Use success stories to help with adoption.** Jerry believes that it's crucial to gather success stories. They consulted with their early adopters and put together real-life success stories. This way, you're not talking theoretical features and functionalities. You're talking about how another team is using this in their day-to-day lives with results. As people are pressured to be more productive, finding tools that help them save time will catch their attention. Find those things that people care about the most. As they become accustomed to and comfortable with the tool, expand their horizons on other capabilities and use cases.
  - One success story is with Yammer groups. In addition to the help desk as a support channel, one participant has created Office 365 support channels that are Yammer groups. They have a Teams' user Yammer group, a SharePoint Yammer group, etc. The early adopters began answering questions within these groups. The result was questions that were answered quickly, meaning that they didn't even make it to the help desk. A great success story.

## LESSONS LEARNED

- When it comes to integrating MS with Jive, one participant said that she and her company are still trying to figure it out. She doesn't believe that they will be able to fully integrate, so they are instead trying to figure out how they can position it as a tool. The panel on this call seems more embedded in the Microsoft universe overall, with the exception of Lance who has just migrated from Jive. For this participant, her feeling when talking to Microsoft is that they are trying to say that this is one big integrated universe, but even within that it's not.
  - Added another participant, her company is still on Jive and they are also trying to figure out how to position Microsoft tools. Some in the company work in Microsoft 365 and Teams and don't have the desire to work with Jive, even though half of the company is still on Jive. Yet the two tools coexist and they will continue to coexist for some time to come because Jive is the company's corporate Intranet. This participant is looking for use cases that don't fit Jive.
  - Lance added that there isn't one tool that can fully replace Jive. However, in combination they can work. Lance had to educate his users on the differences between Jive and MS. In Jive, everything can happen in a place, a group or a space. In the Microsoft world, you will likely have to use some combination of the tools together to achieve what you had before in Jive from a community standpoint. Getting people to understand that and walk through some common use cases was a big challenge in their Jive migration.
    - To help people understand this concept during the migration, Lance created a slide. It helped people to know which tool to use and for which purpose:
      - In the middle core of a circle is the One Drive, which is where people store their *individual work-related files*.
      - The next layer out is Microsoft Teams, which is used for who you work *with regularly*. When you create a Team, you get a SharePoint site automatically.
      - The next layer out after that is Yammer, which is for people who you share a *common interest with*.
      - The next layer out after that is SharePoint. This is used when you want to *share information with a large group*. At Cerner, this is also a front door to the community because when you create a Yammer Group, you automatically get a SharePoint site.
      - The final outer layer is Cerner's Wiki. This is used when you want to *share information with a large group of people or everyone at Cerner*. It requires governance and compliance.

## LESSONS LEARNED, CONT.

- Lance was asked how the migration worked with Jive and MS Tools. Lance explained that there definitely was a period of uncertainty. By and large, people used Teams initially for ad hoc chats and file sharing. Slack had taken hold within pockets of the company, too. When they introduced Teams, there was a segment that was naturally curious and wanted to use it. It was rolled out without much education. Everyone had a license and word spread fast and people used the platform. This caused some confusion. The business decision to formally migrate from Jive to Office 365 forced them to make the harder decisions. They didn't turn on Yammer until much later in the migration because they didn't want to do so without a clear-cut strategy for when they would fully be off of Jive and why they were making the move. Without having that strategy outlined, they thought it would sit badly with employees. It turned out to be a good decision.
  - The impetus to migrate to Teams was that the functionality was different enough from Jive so as not be harmful. However, many teams sprung up that were disposable. Therefore, they shut down teams that have been inactive for 5 months. The owner of the team is contacted and asked to archive the team if they plan to use it. They are given instructions for how to archive. If the team owner doesn't respond within a month, they archive it and then 30 days later it is deleted. The first time they did this, they deleted 4000 teams due to inactivity. The experimentation by users resulted in the need to clean house.
  
- Teams is becoming Microsoft's central tool. They are putting a lot of resources into Teams as a result. For instance, they are planning to eventually sunset Skype. For clarification, Mike added that Microsoft will retire Skype in the Cloud over time. They haven't yet given it a date. That doesn't mean that they are retiring the Skype consumer brand. If you have Skype on Prim, you will have a longer runway to transition. In the meantime for those who are full on in the Cloud, like Thermo Fisher, they are running Skype for Business and Teams side-by-side. The interoperability is decent. It's not perfect, but it works about 90-95% of the time. That will get better over time and then Thermo Fisher will switch over to Teams exclusively.
  - Interestingly, one participant shared that their operation in Korea has just migrated to Office 365, but they refuse to use Teams or SharePoint due to regulatory reasons. They will use Jive. Their situation is one in which they will likely have to use Skype and Teams in parallel. To add further complication, some of their operations are still using Lotus Notes.



## LESSONS LEARNED, CONT.

- Another participant added that this holds true for many companies in that not all are willing to move over to Teams without some hesitation. It is only 2 years old. As mentioned, telephony is difficult.
  - To further complicate this, one participant shared that Microsoft has unlimited bandwidth. In her company, they have to turn this off because they can't allow unlimited bandwidth. Until Microsoft comes up with a solution for that, they won't even be able to use it. Mike added that all of these tools – Zoom, Teams, etc. – will use all the company's available bandwidth unless an administrator intervenes.
- Microsoft will have you believe that Teams can be public or private and you can have a solid mix of both. However, what Mike is seeing at Thermo Fisher is that most teams are private. As a result, they had a lot of people who experimented and created disposable teams. Since they are private, there has not been an impact. It's okay that they are experimenting because they can still perform the governance and archive those teams that are no longer used. There is no cost involved and it doesn't create too much clutter. There was a time when a newly created team would be added to your Outlook global address list, but that has stopped. Microsoft turned that off and IT administrators rejoiced because now you can create these disposable teams for a point-in-time project and then they disappear.
- There are tools on the market to help with the migration of Jive documents and discussions. Lance shared that they could have chosen to migrate the discussions as live Yammer discussions, but the historical context would have been lost, at least with the Cerner homegrown tool. There may be tools on the market that can recall all of the historical content. Therefore, they made a strategic decision that if they are migrating old discussions into SharePoint, SharePoint allows you to create another folder. To Jerry's point, it's very important to understand these tools. To be able to articulate to your community owners or members how this all works together is very, very important. In Lance's opinion, you can't use Teams in Yammer. If you are using SharePoint, you have to understand how SharePoint plays into that. The SharePoint modern sites are much better at content migration than in the past.