



**IRIS**

Anywhere



# How to make the most of your **Microsoft Investment**



The IRIS Guide to The Modern Workplace

# Contents

Overview .....	3
Productivity .....	4
Office Apps .....	4
SharePoint Online .....	5
Microsoft Planner .....	6
Communication & Collaboration .....	7
Microsoft Teams .....	7
Teams Rooms.....	8
Microsoft Yammer.....	9
Security .....	10
Defender for Business .....	10
Developing an Effective Adoption Strategy .....	12
How We Can Help .....	13





# Overview

The way that businesses use technology has changed drastically over the past 5 years. Many of these changes are due to the move from office-based work to remote or hybrid work. As organisations made this move, it was essential to implement new technology solutions to enable productivity, communication and collaboration.

Thankfully, a Microsoft 365 subscription contains all the elements necessary for effective remote and hybrid work. Although most businesses have already invested in a Microsoft 365 subscription, now it is time to maximise usage of the software suite.

Working with a trusted IT provider can help your business maximise your Microsoft 365 investment through smarter use of the existing licensing costs. This also includes making the most of the security features available to protect your business from ever-increasing cyber risk. Not only does this assist with proving lifetime value, but it also increases ROI, and can lead to an overall increase in revenue.

In this eBook, we will delve into the productivity, communication & collaboration features within Microsoft 365, as well as provide insight into how your business can develop an effective adoption strategy.



# Productivity Office Apps



The Microsoft Office Apps include all the applications that Microsoft is known for, such as Word, Excel, PowerPoint and Outlook, as well as some additions such as OneNote, To Do and OneDrive. Smarter use of these apps can increase productivity within an organisation and save money, by reducing the need to purchase other solutions. There are also cloud features packed into the Office Apps that can transform the way employees work, such as web and mobile applications, co-authoring and the ability to share.

## Co-Authoring

As Microsoft 365 is a cloud-based solution, users can collaborate and co-author Office files in real-time, on any device with an internet connection. This includes Word, Excel and PowerPoint documents.

When co-authoring, each application will also handle version control, so it is simple to compare versions when other users make changes to the document. This feature is only available if files are shared, rather than sent as individual files.

## Cloud Storage

In order to make the most of a Microsoft 365 subscription, businesses should take advantage of the cloud storage available through OneDrive.

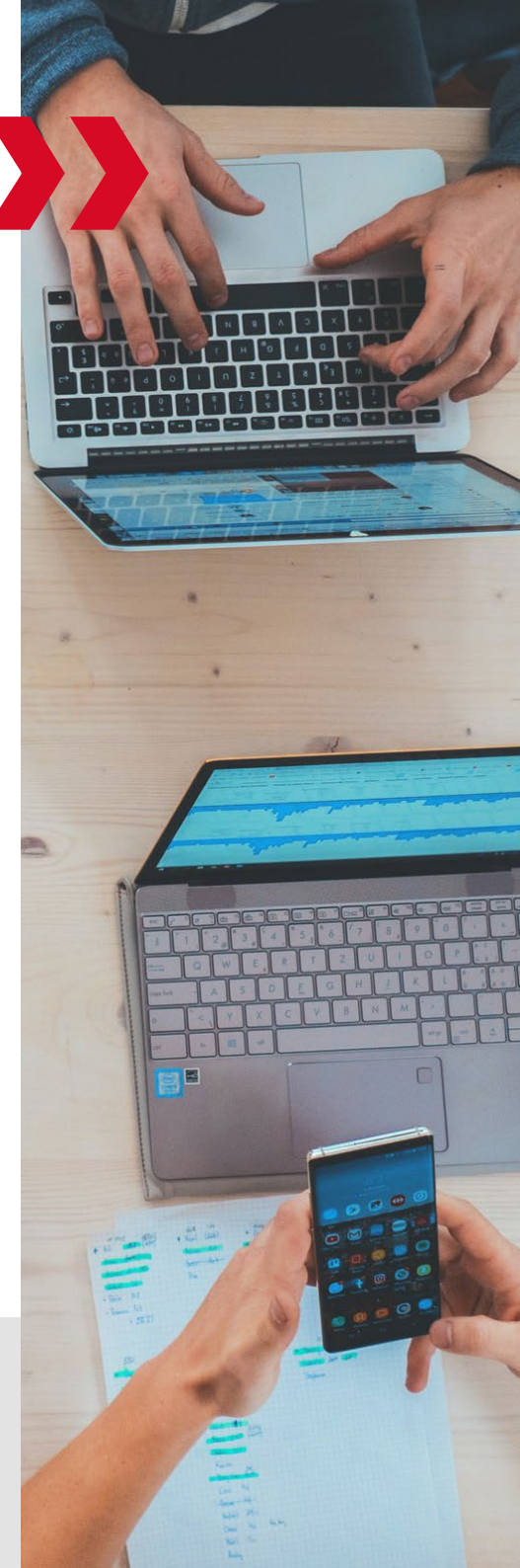
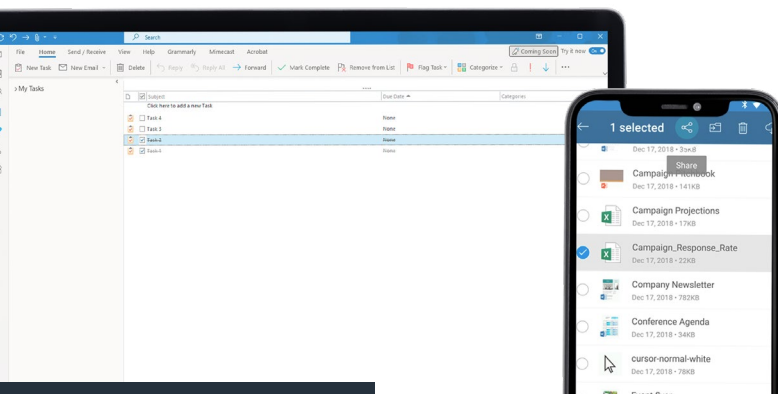
With a Microsoft 365 subscription, all users have 1TB of OneDrive storage. Using this cloud storage ensures that employees can access the information they need to work effectively from anywhere. It also makes it easier to share documents and files, without emailing large attachments.

## To Do Lists

Microsoft To Do is a cloud-based task management solution that allows users to manage their tasks from any device. This sets users up for success with daily and weekly to do lists that assist with time management and employee wellbeing.

Users are also able to share their To Do lists with colleagues to keep them up to date with their workload and tasks. There are other similar products on the market, such as Todoist, however, these have additional costs, whereas To Do is included in a Microsoft 365 subscription.

If employees use all of the Office Apps available, as well as the cloud features available in each, businesses can achieve a greater ROI whilst improving the employee experience.



# SharePoint Online

SharePoint is a collaboration, productivity and communication platform that powers file collaboration across a business's Microsoft 365 ecosystem. Typically, SharePoint is used for an organisation's intranet, making it possible to easily share information between employees and departments, or acting as a knowledge-sharing platform. However, SharePoint Online is powerful and adaptable, especially as it integrates with Microsoft Teams. For businesses seeking to maximise their Microsoft 365 investment, they should use SharePoint online to its full extent, enabling greater productivity, collaboration and communication.

## Document Management Systems

SharePoint is an ideal document management system, as it is flexible with all the features necessary to manage documents, whilst still allowing a simple user experience.

SharePoint allows for upload of all types of documents, with the ability to define metadata categories to make it easy for users to find the documents. It is also possible to define security groups to access specific sites and libraries, so each department can have their own document management system, designed for their specific needs.

## HR Process Automation

Another way to maximise your business's Microsoft 365 investment is by taking advantage of SharePoint's flexibility to automate repetitive tasks for an HR department. Some tasks that can be automated include onboarding processes, creating roles and access requirements for onboarding, tracking legal documents and booking holidays.

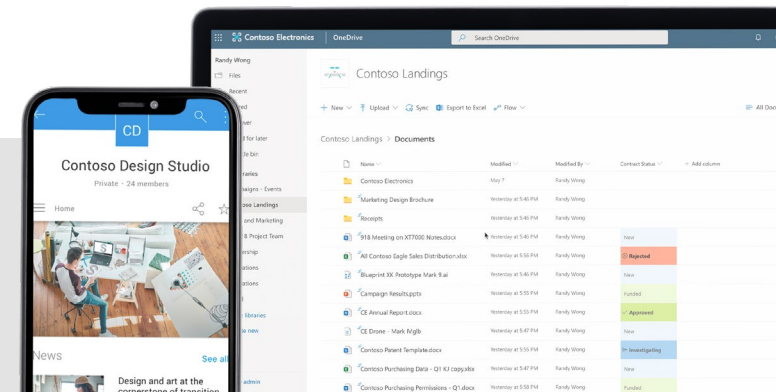
Working with a trusted IT provider can help your business make the most of these additional use cases.

## Site Templates

To empower employees to make the most of SharePoint, it is possible to use site templates to give users a starting point for any SharePoint site. From this template, employees can make changes to suit their specific use case, whilst providing significant time savings by not needing to start from scratch.

Some of these templates include news and resources, training and courses, employee onboarding, crisis management, event planning, project management and more.

With the recent advancements in SharePoint Online, all businesses are empowered to create custom SharePoint sites without needing custom development.



# Microsoft Planner



If your business struggles with project and task organisation, or you find yourself spending too much time tracking progress, Microsoft Planner might be right for you. Planner is included with all Microsoft 365 subscriptions and is perfect for an agile workflow. It allows users to create plans with tasks, and subtasks that can be assigned to relevant users with set deadlines. This can help teams to manage projects and reach their goals, leading to better business outcomes. There are other similar solutions available, such as Asana and Mondays, but businesses can save a significant amount by using this native Microsoft solution.

## Project Templates

Often each department using Planner will have projects with multiple identical steps. To save time, it is possible to create a template project plan that can be copied to each new project.

Once the template is copied, tasks can be assigned to the correct employee, and it is ready to use. This saves significant time and improves user adoption of the solution.

## Outlook Integration

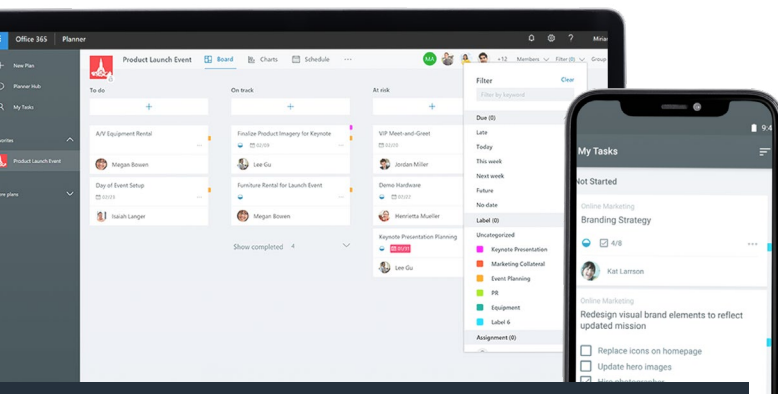
After a Planner project has been created with deadlines, there is a calendar view to clearly view upcoming deadlines and project dates. As Planner can integrate with Outlook, this calendar view can be copied to a user's Outlook calendar.

This adds to the value of Planner as it further assists employees with managing their time and meeting project deadlines.

## Agile Project Management

Agile project management is a proven methodology that involves breaking projects down into server stages, known as sprints. This approach can help all departments deliver value to customers faster, with fewer hurdles along the way.

Microsoft Planner can facilitate Agile project management with Buckets for each sprint, containing tasks and subtasks. Notes from the daily Scrum meetings can be captured using OneNote and linked to Planner.



Using Planner help employees and teams stay on track and meet project deadlines, without the need to invest in an additional third-party solution.

# Communication & Collaboration

## Microsoft Teams

Microsoft Teams needs no introduction in 2022. The solution has enabled productive remote and hybrid working for over 270 million monthly active users. Many businesses implemented Teams to facilitate a change in the workplace model, and therefore only use the basic features, such as instant messaging, voice calling and video conferencing. However, if businesses make use of Teams' full functionality they can save money, be more efficient and change the way employees work for the better. Similarly, if businesses use Teams as a single solution for all unified communications they can massively increase their ROI.

### Teams Apps

Within Teams, users can access all Office Apps, such as Word, PowerPoint, Excel, Planner and more. Using these apps within Teams can save employees time by reducing the need to swap between windows.

However, this barely scratches the surface, as there are more than 700 other apps that can be added to Teams, including Trello, Salesforce, Dynamics 365, DocuSign and more. Having all these apps within Teams makes it easier to have a single app to use for all aspects of an employee's job.

### Bookings

Microsoft Bookings is a scheduling and appointment booking tool that is integrated with Teams and a user's Outlook calendar. Employees can create a webpage that allows customers or prospects to book a call with them, only showing dates and times that are available on their calendars.

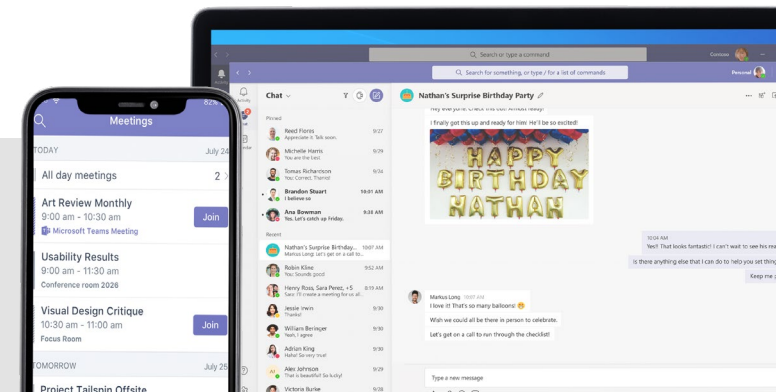
Once the appointment is booked, a Teams meeting is automatically created, with emails being sent to notify both parties.

### Whiteboard

Every Teams meeting has a digital whiteboard that can be used to collaborate, brainstorm, plan and share with colleagues. This tool can be found under the 'Share' button on a Teams call.

The Whiteboard includes features such as sticky notes, drawings, shapes, text, arrows and pre-set templates. After the brainstorming session is complete, the whiteboard can be saved and shared for future use.

Whilst Teams is already used by hundreds of thousands of organisations worldwide, many organisations have not unlocked the full value of the unified communications solution.





# Teams Rooms

With the recent changes in the way employees work, hybrid meetings are now a common occurrence. However many businesses have not updated their meeting rooms to accommodate these changes. In order to make the most of Teams, businesses can implement a Teams Rooms solution. Teams Rooms are meeting room solutions designed to ensure that everyone can be seen, heard and participate from anywhere. Although there are additional costs associated with Teams Rooms services, they achieve a 523-644% PROI primarily through an increase in end user productivity.

## Intelligent Joining

Some of the features unique to Teams Room include methods of joining meetings, such as one touch join and proximity join. One touch join is a feature that enables attendees to engage the audio and video equipment and join the meeting with a single button on the Teams Room hub.

This alleviates the headache of having to set up and troubleshoot equipment before every meeting. Proximity join is a feature that enables impromptu meetings by allowing employees to connect to a Teams Meeting Room using Bluetooth from their phone or device.

## Flexibility

Teams Rooms solutions are highly flexible, with options to suit a wide variety of meeting room sizes and use cases. This includes everything from smaller focus rooms, that require a display, audio equipment and a camera to large meeting room spaces with multiple microphones, cameras, and Teams panels.

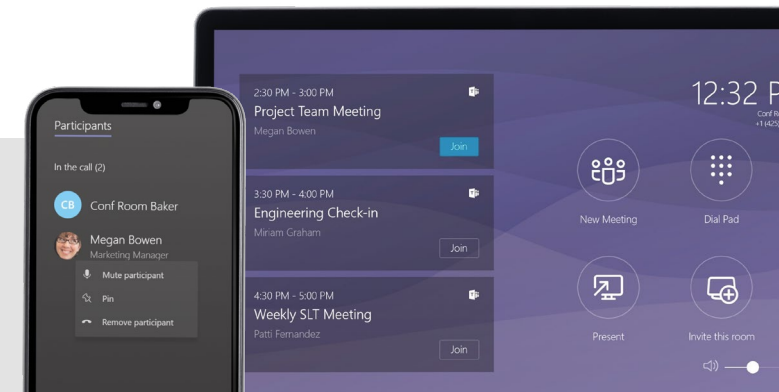
It is even possible to integrate an interactive whiteboard within a Teams Room to further improve productivity and collaboration.

## Inclusivity

The primary goal of a Teams Rooms is to ensure that all participants have a similar experience, regardless of where they are located, or what device they are using.

This is achieved through hardware that creates a better experience for remote attendees, as well as software features that help solve the challenges of hybrid meetings.

For businesses that already use Microsoft Teams, implementing Teams Room software and hardware can transform the meeting experience for both remote and in-person attendees.





# Microsoft Yammer



Employee engagement has become increasingly important, especially as with ongoing skill shortages it is becoming more challenging for businesses to retain their top talent. However, aside from retaining talent, employee engagement also affects an organisation's bottom line, as businesses with a highly engaged workforce are 21% more profitable. Microsoft has multiple products to increase employee engagement, including Yammer, which is included in a Microsoft 365 subscription. Yammer is a social network for businesses, designed to improve employee engagement and foster open and dynamic communication.

## Build Company Culture

Company culture can make or break a business. Yammer helps to build company culture as it is a platform that allows employees to develop and maintain close connections with one another.

Especially in mid-size and large organisations, it is common for departments to feel siloed and separated. With Yammer, departments can share regular updates that lead to open discussion, further enhancing a company's culture.

## Share Knowledge

Microsoft Yammer provides a platform for employees to quickly and easily ask questions to the wider company. Rather than digging through a company's knowledge management system, Yammer allows employees to ask questions to the entire company. It is also possible for administrators to select a 'best answer' so it can be found by other employees.

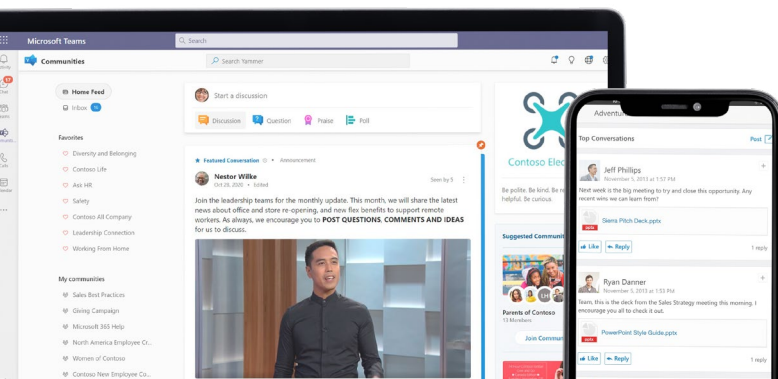
This results in accurate answers, quickly and easily, whilst also improving communication and employee engagement.

## Recognition & Praise

Hard work can often go unnoticed, leading to poor employee engagement, especially if employees are working remotely. With Yammer, employees are able to publicly praise other employees for their good work. This ensures that employees receive the recognition they deserve, not only from their immediate team but the company as a whole.

Fostering a culture of recognition and praise significantly increases employee engagement as it shows that employees are valued and appreciated within a company.

If employees use all of the Office Apps available, as well as the cloud features available in each, businesses can achieve a higher ROI in their Microsoft 365 investment whilst improving the employee experience.





# Security

## Defender for Business

Cybersecurity is a major concern for businesses across all industries, especially as 39% of businesses in the UK have identified a cyberattack already in 2022. When considering cybersecurity, it is essential that businesses consider the entire attack surface and have a security solution that is comprehensive and flexible to plug as many gaps as possible. However, this often requires having multiple disparate security solutions, which can become a costly endeavour.

Thankfully, a Microsoft 365 subscription includes many security features that mean businesses do not need to purchase as many additional third-party solutions. Some of the services included in a Microsoft 365 Business Premium subscription include Intune, Information Protection and Azure AD Premium Plan. A recent addition to this family of security services is Defender for Business, which is a powerful endpoint protection platform (EPP).





## Next Generation Protection

Defender for Business not only detects and blocks known threats, but it also has next-generation protection to detect and block never before seen attack methods. This happens in real-time using machine learning of user behaviour, metadata, file classification and other novel technologies.

This works in tandem with attack surface reduction to further increase a business's cyber risk.

## Attack Surface Reduction

Attack surfaces are any place where a business is vulnerable to a cyberattack. Defender for Business reduces this attack surface with application controls, removable storage protection, application controls, network protection and more. Admins can then monitor events in the Event Viewer to ensure that these controls are working effectively.

By reducing your businesses attack surface, it leaves less entry points for cybercriminals to target your business.

## Threat & Vulnerability Management

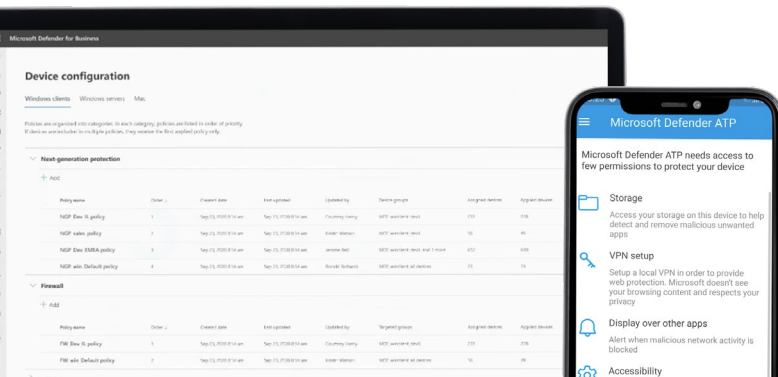
Vulnerability Management is the process of identifying, assessing, managing and remediating vulnerabilities across a business. Defender for Business improves asset visibility and provides breach likelihood predictions to prioritise the most critical vulnerability on each asset, with recommendations on how to mitigate the associated risk.

Vulnerability management makes it possible to defend against all known threats, but it is a cyclical process, that needs to be constantly managed.

## Managing Security Posture

Whilst the security features included in a Microsoft 365 subscription are incredibly powerful, they require expertise to set up correctly to use them to the best of their ability. For this reason, many businesses choose to work with a trusted third-party IT provider to implement these security controls and manage security posture over time.

Outsourcing these requirements to a third-party also enables them to implement additional security solutions to ensure that your business is protected from the ever-growing cybersecurity threat landscape.



Although most businesses will need to invest in additional cybersecurity services, working with an IT provider with Microsoft security expertise can save your business money whilst improving your overall security posture.

# Developing an Effective Adoption Strategy

Simply purchasing and using some of the features included in a Microsoft 365 subscription does not mean a business and its employees have adopted the technology. In order for a business to truly maximise their Microsoft 365 investment, they require an effective adoption strategy. This strategy can be divided into 4 key stages.

## Stage 1: Define Goals

Before a business make the decision to create an adoption strategy for any new technology or Microsoft 365 solution, they should define a clear set of goals. This will help guide the strategy, as well as set measurable success criteria. Some goals may include: an increase in employee satisfaction, an increase in customer satisfaction, less time wasted searching for files or an increase in collaboration.

## Stage 2: Communicate with Employees

Once the goals have been set, businesses should speak with employees around their current pain points, and views on a technology. From here, it is possible to create defined use cases for a solution, which will make it significantly easier for employees to understand the tangible benefits of adopting the solution. This stage will also make it clear how to best educate the employees on how to use the technology effectively.

## Stage 3: Educate Employees

No two businesses are the same and no two employee are the same, therefore, it is essential that education and training is tailored to the individual's learning style. After employees have a basic understanding of how to use the new technology, businesses should focus on using the technology in an employee's everyday workflow. Simple to understand user guides should also be distributed to allow employees to refer back to their training in how to use the solution.

## Stage 4: Optimise

Microsoft 365 has powerful usage analytics and reporting on how an organisation is adopting various Microsoft services. These analytics can be used to optimise usage of Microsoft 365 solutions, leading to greater adoption, and therefore a better ROI on the business's Microsoft 365 investment.



The IRIS logo consists of a vertical bar with a red square at the top, followed by the letters 'I', 'R', 'I', and 'S' in a bold, sans-serif font.

Anywhere



## How We Can Help

IRIS Anywhere empowers your accountancy firm to thrive wherever you need to work, through the combined power of the cloud and world class accountancy software.

Bringing together industry leading accountancy software with productivity boosting Microsoft tools into one single cloud-based platform, which is so much more than a hosted desktop.



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