About Us!

Tamara Bredemus
tamara@go-planet.com
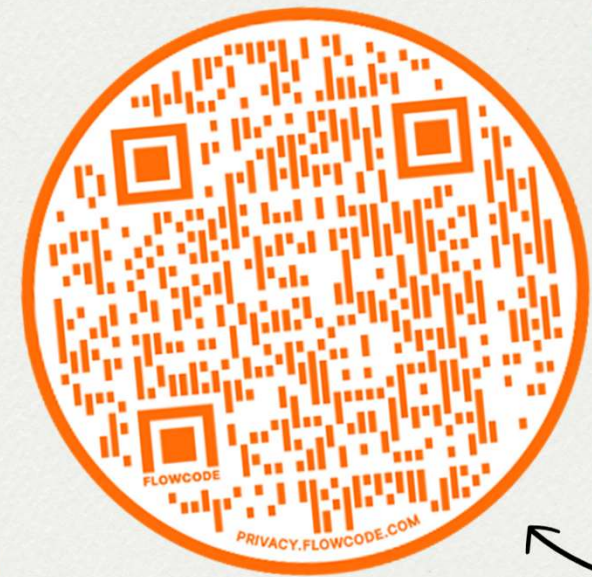
Jennifer Mason
Jmason@go-planet.com

Presentation

→

Download presentations and resources at the following website:

https://go-planet.com/evolve365/champions-workshop/

Download QR

Internal
Champions Program

May 2025

Adoption is about people NOT technology
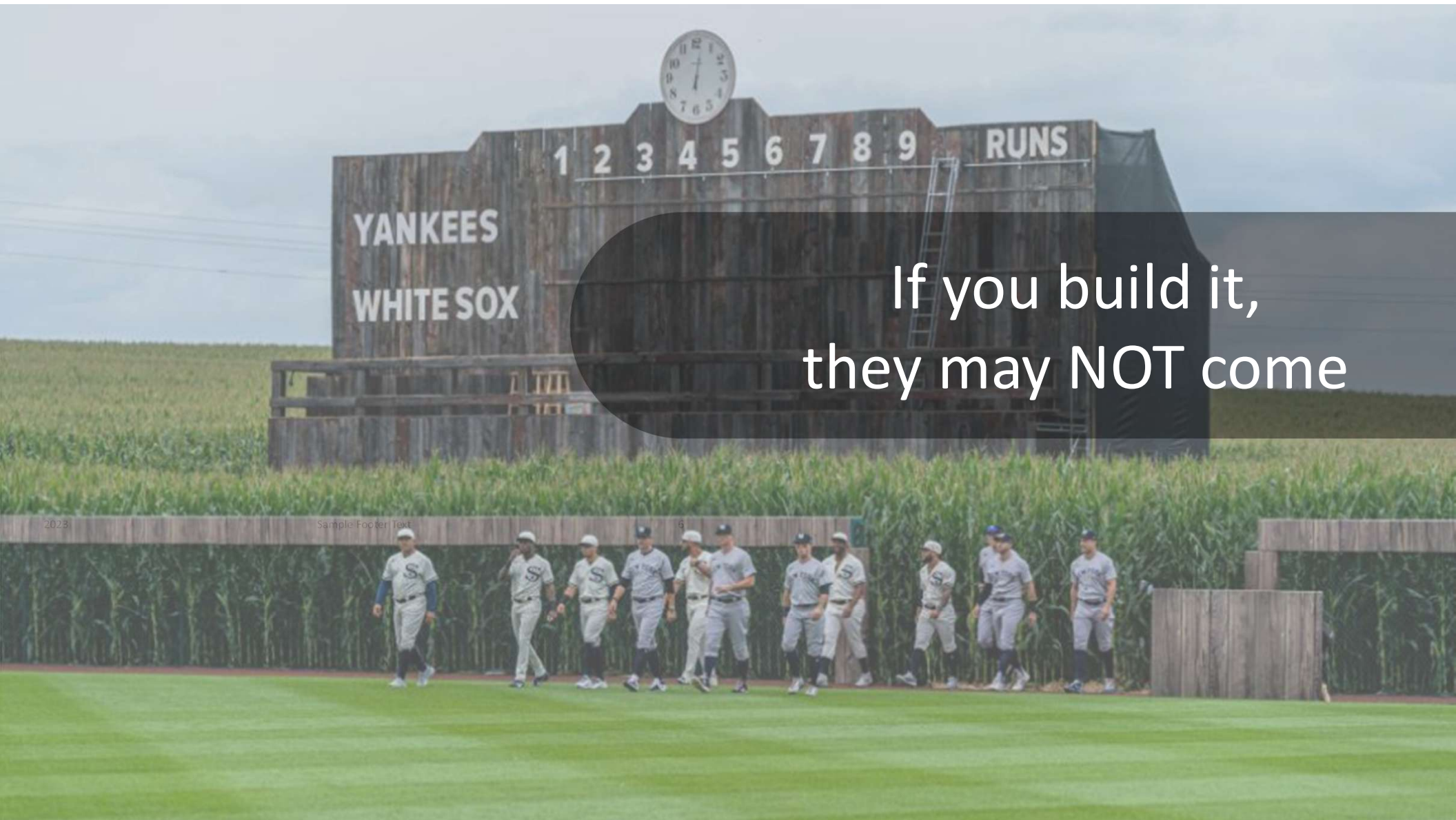
If you build it,
they may NOT come

Sample Footer Text 6

Cried "Wolf"
too many times
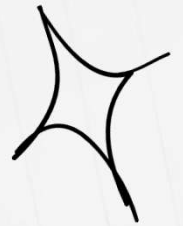
Tell Us About You!

- Introduce Yourself
- Tell us 1-2 things You want to get out of the workshop
- Tell us a struggle You have had with champions groups

What is it?

An Internal Champions Program is a structured initiative where selected employees act as peer advocates to drive adoption, engagement, and best practices for new tools, processes, or technologies.

Champions Programs

Key Characteristics

1 Energetic!

Champions are enthusiastic users who influence and support their colleagues.

2 Real World!

They provide real-world use cases, troubleshooting, and encouragement to drive adoption.

3 Helpful!

The program reduces IT workload by fostering peer-to-peer learning.

Why does it work?

1 Trust

People trust peers more than IT or leadership when adopting new technology.

2 Reinforcement

Reinforcement over time makes adoption stick beyond training sessions.

3 Feedback

Creates a feedback loop between end users, IT, and leadership.

Adoption Journey

Best in Class

The organization sets an example of a service-driven organization for the industry of best in class use of technology.

Constantly Improving

The organization has a continuous feedback loop that allows them to fix problems as soon as they are identified.

Proficient with Technology

The organization runs well using technology efficiently to solve its biggest problems. They spend their time finding new value in tech vs fixing inefficient processes.

Improving with Technology

A plan is in place to help users improve productivity with specific tools and there are measurable goals to meet.

In the Moment

Users rely on technology in the moment of need. They use things ad hoc and when needed.

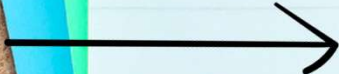|	In the Moment	Improving with Technology	Proficient with Technology	Constantly Improving	Best in Class
New Product / Features Released	Ignore It	Discover it by accident	Search for online help	Identifying ways new features can improve productivity	Providing training on new feature and notifying users proactively
When a users needs help, they…	Call their favorite admin / friend.	Call the help desk.	Search the internet.	Uses multiple resources: - Search - Corporate Training - Classes - Help Desk	Solves issues and then puts together FAQs for others to utilize their solution.
How does the organization share training information?	Does not, expects users to use external resources.	Expects users to pull the information from multiple internal resources. (ie Intranet or Training Site)	Includes links to training classes and resources in regular announcements and communications.	Encourages users to attend training and tracks completion for employee credit.	Encourages training, provides time to complete training and delivers training through multiple delivery channels.
How many of Microsoft 365 Features do you Use	What are you talking about?	Only the features I need to get my daily tasks done.	Using the core features but exploring the new features – especially when they pop up as highlights when I log on.	Explores the what's new features regularly and incorporates them into existing workflows as needed to improve proficiencies.	Communicates new features to users on a regular basis, providing examples to users on the features and how they can be incorporated into everyday activities.

How often do you need to reference instructions?

- All the time
- Some of the time
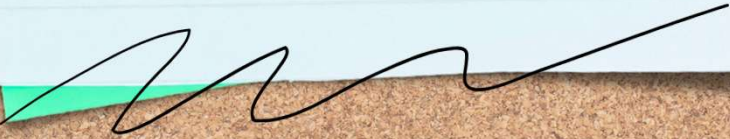- Rarely
- Only when I am trying something new

When a users needs help, they...

- Call their favorite admin / friend.
- Call the help desk.
- Search the internet.
- Uses multiple resources:
  - Search
  - Corporate Training
  - Classes
  - Help Desk
- Solves issues and then puts together FAQs for others to utilize their solution.

How does the organization share training information?

- Doesn't
- Internal resources. (ie Intranet or Training)
- Regular announcements and communications.
- Attend training and tracks completion for employee credit.
- Encourages training, provides time to complete training.

How many of Microsoft 365 Features do you Use

- What do you mean
- What I need to get my daily tasks done.
- Using the core features but exploring the new features
- Explores the what's new regularly and incorporates them
- Communicates new features to users on a regular basis

Activity!

→

Take a few minutes to think about your organization and answer the following:

- Where are you on the adoption journey?
- Where do you want to be?
- What are your top 3 blockers / concerns?

Adoption Journey

Setting the Stage for Adoption

- Define the "Why": Why does this technology change matter to the business?
- Leadership Alignment: Champions need executive support for credibility.
- Messaging Matters:
  - Focus on benefits, not features.
  - Speak in user-first language: "How does this make your job easier?"
  - Tie adoption goals to business objectives (e.g., efficiency, compliance, innovation).

Do you know what your users want?

- Before you dig into a champions program, are you sure you know what your users need or want ?

- Consider doing a survey to learn about your users and then build the program to help fill the needs.

Sample Survey Questions

- What is your role within the organization?
- How proficient do you consider yourself with technology tools?
- What collaboration tools were you using before the M365 rollout?
- On a scale of 1-10, how would you rate your familiarity with M365?
- Which features of M365 do you use regularly?
- Are there any tools within M365 that you find unnecessary or too complicated for your role?

More Sample Questions

- How sufficient was the training provided for M365 adoption?
- What additional training materials do you need to use M365 products effectively?
- Were the reasons for migrating to M365 clearly communicated?
- How do you prefer to receive updates about changes to M365?
- Have you noticed an increase in productivity since using M365?
- Overall, how satisfied are you with your use of M365 products?

Strategies for Effective Adoption

- What Makes Adoption Stick?
  - **Peer-Led Change**
    - Champions as trusted voices.
  - **Behavioral Nudges**
    - Use small, repeated engagements to build habits.
  - **Personalized Learning**
    - Role-based, scenario-driven training instead of generic sessions.
  - **Quick Wins & Success Stories**
    - Highlight early adopters to create momentum.

Adoption Tactics

Get creative! Anything Goes!

Communities of Practice

Regular syncs where Champions share use cases.

Gamification & Incentives

Reward usage, create challenges.

Reverse Mentoring

Champions help leadership use the tool, too.

Activity

→

We can't do it alone.

We need locally sourced Champions.

Successful Champions bring a certain

something to the table.

How do you describe that certain something

Get together in small groups to develop your

Champion's Wanted poster.

8 Minutes and then share with the group.

Champions Wanted

Job Posting
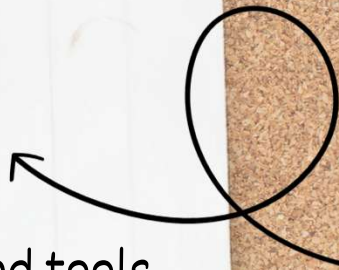
Champions Wanted

Are you passionate about driving our success from the inside out?
We're looking for **Champions** to be the enthusiastic voice of our people and tools to rally teams, gather feedback, and empower adoption across the organization.

What You'll Do: Evangelize tool value across departments * Act as a bridge between the business people and the tool team * Provide training, support, and best practices to maximize adoption * Gather feedback and insights to inform tool and solution improvements * Answer questions from the business people on tool value and usage * Create internal momentum and build a network of advocates

What We're Looking For: A thirst for knowledge * Understanding of the tools available * Natural communicator with influence and energy * Problem-solver who thrives on collaboration

Small Commitment = 2 hrs/wk   Medium Commitment = 3-5 hrs/wk   Large Commitment = 5-8 hrs/wk

Champion Agreement

This agreement defines the role, responsibilities, and expectations for a Champion participating in the successful rollout and continuous improvement of Microsoft 365 and the Power Platform.

Champion Responsibilities

As a Champion, you agree to:

- Serve as the primary contact for [Team/Department Name] regarding Microsoft 365 tools and the Power Platform.
- Dedicate approximately 2–4 hours per week for Champion-related activities, including:
  - Reviewing product updates
  - Participating in feedback sessions
  - Engaging in early testing of new features
  - Answer user questions
- Attend and contribute to Champion check-ins:

  ☐ Weekly ☐ Bi-Weekly ☐ Monthly (select one)
- Promote user adoption through peer support, encouragement, and example.
- Share product updates, tips, and resources with your team.
- Gather and communicate feedback, pain points, and success stories to the product team.
- Support onboarding of new users by answering questions and sharing training tools.
- Stay informed on new features, releases, and known issues.
- Collaborate with fellow Champions to align feedback and identify opportunities for enhancement.
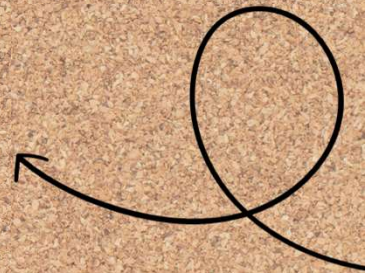
Support Provided

Champions will receive:

- Priority access to training, product documentation, and resources
- Direct input opportunities into Microsoft feedback
- Early access to upcoming features or pilot programs [Check with IT about early access]
- Direct line of communication to the [collaboration] team

Acknowledgment and Agreement

I understand and accept the responsibilities of a Champion and agree to contribute to the success of Microsoft 365 and the Power Platform in my team.

Champion Name	
Department/Team	
Start Date	
Commitment Frequency	☐ Weekly ☐ Bi-Weekly ☐ Monthly
Estimated Weekly Hours	☐ 2 hours ☐ 4 hours ☐ 8 hours

Digital Signatures
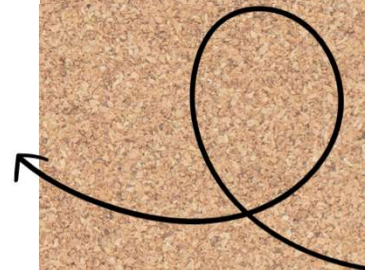
Champion:

Name: _____

Signature: _____

Date: ____ / _____ / _____

Champion's Supervisor/Manager:

Name: _____

Signature: _____

Date: ____ / _____ / _____

Identify
Champion Types

Champion types

Type

Early Adopters

Characteristics

Innovators

Button pushers

Enjoy research

Strategy

Provide advanced training

Access to new features

Encourage to share Knowledge

Champion types

Type

Social Butterflies

Characteristics

Tech-savy

Collaborators

Brings people together

Strategy

Provide introductions to others

Set up space for knowledge sharing

Set up space for collaboration

Champion types

Type

Practical Users

Characteristics

Leaders by reputation.
Not by title.

Steady and reliable

No time to spare

Strategy

Show efficiency gains

Short trainings with leave
behinds

Champion types

Type

Regulatory Users

Characteristics

Compliance-driven

Needs official policy, rule, or guideline for usage

Preserve data security and privacy

Strategy

Get policies in place on when and how to use M365 products

Share how the changes prevent breaches and non-compliance

Champion types

Type

Frontline Workers
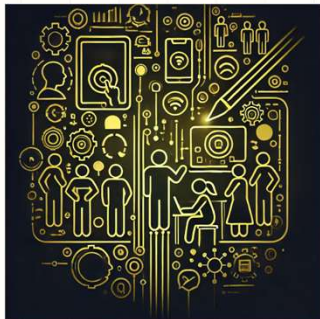
Characteristics

Won't let new product/systems get in the way of completing job

On the move

Don't have their own desk or computer

Strategy

Drive home the mobile and offline features

Provide training that takes their "on the move" requirement into account

Champion types

Type

Executive Users

Characteristics

Big picture

Long-range
strategy planning

Strategy

Remove unnecessary details

Get to the point

Show data-driven decision
making

Allow workers to catch them
using the tools
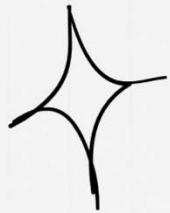
Rewards
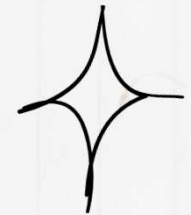
1 • NEW SIGNATURE LINE

2 • DEDICATED STUDY TIME

3 • NOTE TO BOSS

4 • SHOUT-OUTS

5 • BADGES

6 • SWAG

Name the Champions Group
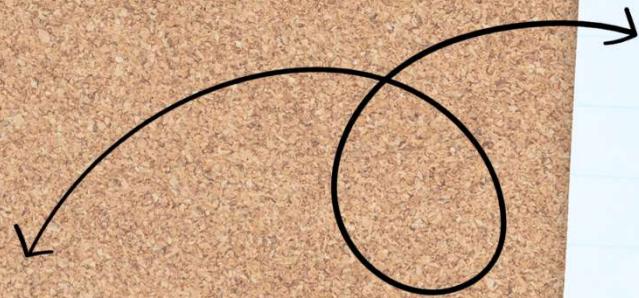
Potential Groups

1 Fishbowl

Minnow

Guppy

Goldfish

2 Justice Hall

Citizen

Sidekick

Superhero

3 Trailblazers

Groundbreakers

Innovators

Vanguards

Training Plans

A custom training plan is essential because it aligns learning with real business needs. Instead of a one-size-fits-all approach, a tailored plan focuses on the specific roles, workflows, and goals of your organization. This ensures users get the right information at the right time—boosting adoption.
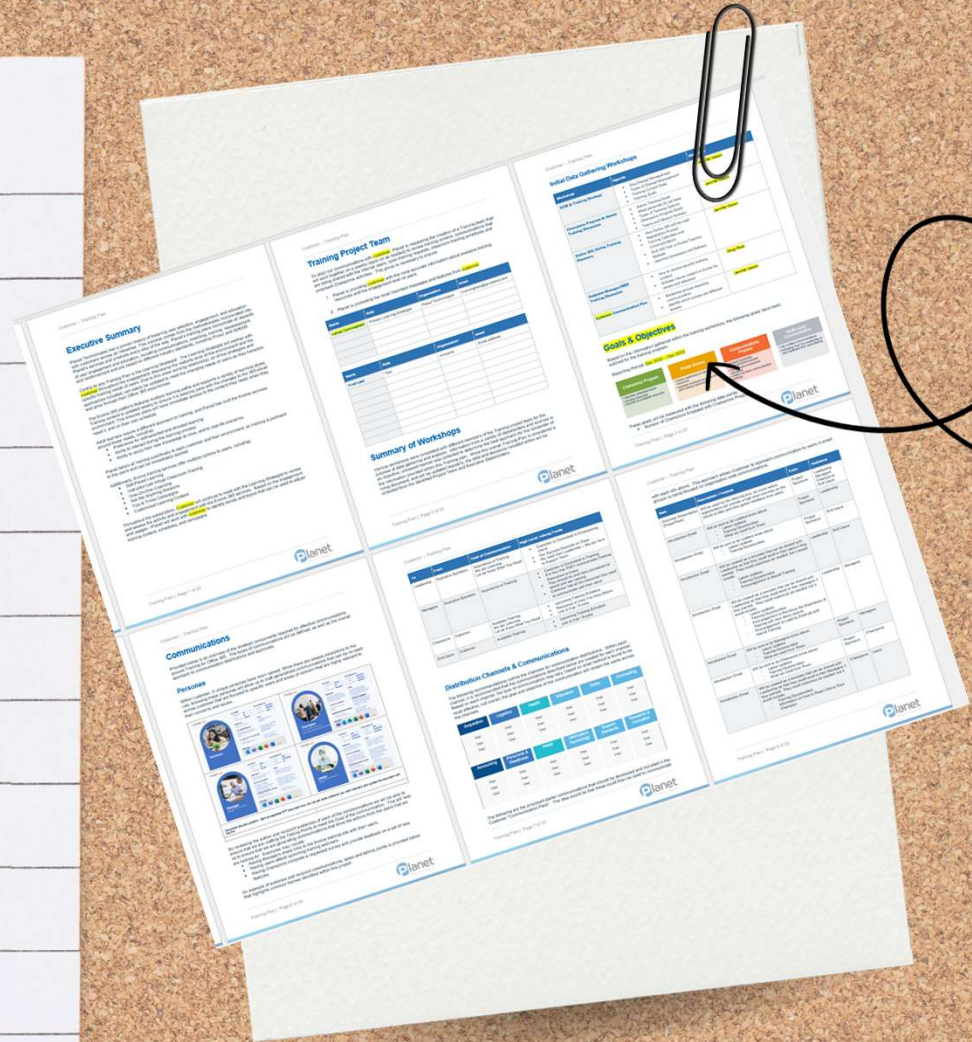
How to get started?

- Find a Template
- Customize for Organization
- Fill in Details
- Define a Cadence to Review & Update
- Execute – Review – Repeat!

Outline
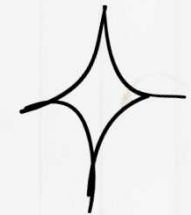
1 • Goals & Objectives

2 • Communication Types & Channels

3 • Reporting and Analytics

4 • Champions Program & Activities

5 • Calendar

6 • Training Management

Are we ready

- Clear vision for organization
- Clear vision for the individual
- Level of overall change
- Executive alignment

Is your Organization Ready?

→

- How have past adoption programs faired?

- Are there other key initiatives rolling out ?

- What are the perceived risks and benefits?

- How will you highlight benefits?

- How can you mitigate risks?

- What internal resources are available?

  - Communication channels

  - Training cadence

  - Leadership events

  - Change network

Learn from the Past

Do you know the why?

- Why are you making this change ?

- What benefits do you see happening?

- What bad happens if we don't make the change?

Explain the Why

Things to Consider!

1 Audience

Not all users need the same training. Break your audience into groups based on roles, technical comfort, or use cases. Tailor content so that each group gets what's most relevant to them—power users need different support than casual users.

2 Timing

Roll out training in phases that align with your implementation timeline. Include a mix of formats—live sessions, on-demand videos, quick reference guides—to meet different learning styles and schedules.

3 Reinforcement

One-time training isn't enough. Plan for follow-ups like office hours, microlearning, and in-product tips to reinforce learning. Make sure users know where to get help when they need it.

Getting Leadership Buy-In

Tie Training to Business Outcomes

Involve Leadership Early

Keep It Brief and Full of Data

Use feedback and results to build momentum.

Highlight Risk of No Training:
- Cost of untrained users—errors, resistance, and low ROI.
- Share lessons learned from past tech launches.

Share lessons learned from past tech launches.

Meaningful KPIs

KPI Measure / Name	A high-level summary for the measure. For example, the number of employees that are members of Teams.
KPI Reporting Frequency	The cadence that reporting runs on for this metric.
KPI Formula	The details of the calculation ensuring it's connected to the data sources and instruments below.
Data Sources	Details on exactly where the data is coming from. How many people ? Which groups ? Which systems ?

Meaningful KPIs

Data Gathering, Transformation, & Analysis Process	How is the data being pulled from the data sources ? For example, is this a dynamic pull at 7 a.m. the first Monday of the quarter, or is this an extract from a static file that is always two weeks old ?
Data Gathering Instruments	Do we need to create any instruments (surveys, feedback forms) or create guides on data transformation to collect the data we want ?
Data Gathering Owner	State which person, or group of people, is assigned to each part of the data gathering, transformation, and analysis process.

Success

What does success look like?

Success Criteria

Reduced operating costs

Increased adoption correlates to reduced third-party conferencing usage, travel time and resource allocation

Method

Quantitative

- Microsoft 365 reporting
- Finance/accounting reports
- Travel and phone expense reports

Goal

Comparison of pre and post Microsoft 365 reports will show cost savings. Post rollout usage of third-party phone conferencing should show decreasing usage of 10% per month.

Success Criteria Scorecard

Business Value	Value Type	Business Owner	KPI Measure	Data Source	KPI Formula	KPI Baseline	KPI Target
Enabling additional customer engagement through online meetings	Increase sales	Alexandre Levesque	Number of meetings set up and conducted	Skype for Business	Number of meetings online/number of meetings	5%	55%
Increase customer engagement and employee satisfaction (reduced travel time)	Reduce costs	Alexandre Levesque	Number of meetings set up and conducted	Skype for Business and an employee poll or survey	Number of meetings online/number of meetings Average stated employee satisfaction	35%	70%
Increase access to information and the ability to share best practices and learn from each other	Increase sales / Reduce costs	Pedro Correa	Reduce % time and cost to create customer-ready content	Yammer and SharePoint Data	Number of engaged members/total number of members. IP Count	45%	80%
A safe and open collaboration approach for easy sharing of messages and news between employees	Increase sales	Maison Saucer	Percentage of groups that are active	Yammer Data	Number of engaged members/total number of members Number of new posts Number of new executive posts	0%	65%
Provide a consistent schedule and task management application for managers, shift leaders and employees	Reduce Costs	Maureen Bousquet	Schedules in tool	StaffHub Data	Number of people who have shifts in the tool/total number of people on shift patterns	25%	90%

Reporting Success

1 Reporting

Microsoft 365 Steering Committee

2 Frequency

Monthly meetings

3 Format

Share success scorecard during live meeting and post to Teams channel after monthly meeting for access by all key stakeholders

4 Vehicle

PowerPoint

Activity!

→

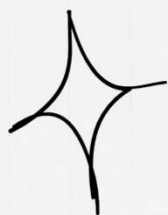- Break into groups of 4-6

- Scenario:

  - Imagine your team is launching a new company-wide tool. You've been asked to design a training plan—but leadership isn't fully on board yet."

- Prepare a 2-minute pitch to leadership that includes:

  - The business value of training

  - A risk of not training

  - One leadership ask (e.g., funding, communication)

"Pitch the Plan"
Leadership Buy-In

Our Resources
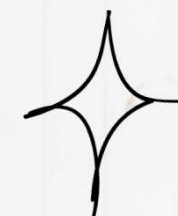
1 Job Description & Agreement

2 Learning Campaign

3 Training Plan

4 Storytelling Guide

5 Journey Map

6 Train the Trainer Kit

Resources

Download presentations and resources at the following website:

https://go-planet.com/evolve365/champions-workshop/

Download QR
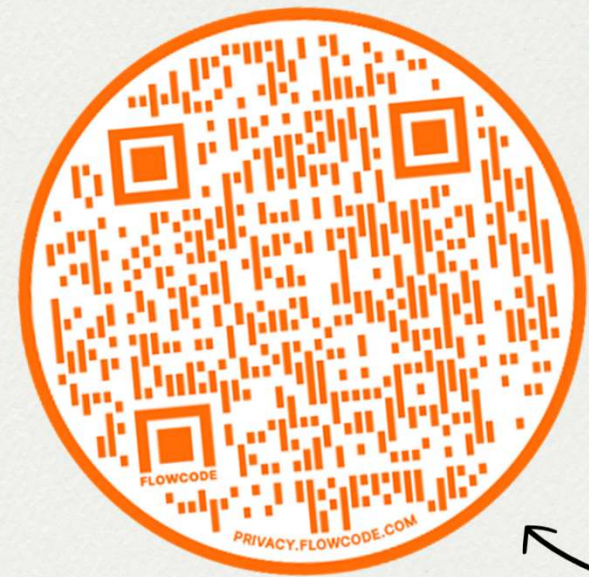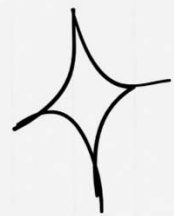
Microsoft Resources
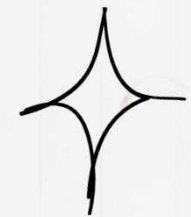
1 Adoption.Microsoft.com

2 Champions Team App

3 Storytelling for Champions

4 Adoption Guides

5 Productivity Library
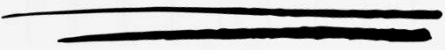
6 Modern Workplace Training

Success Stories

Plan a Story

Simplified Scenario Mapping
To help identify business scenarios, consider using the framework below

As someone in...
(Team)

I want to....
(Description of what I want to do)

Using...
(Specific application of the technology)

I'll know this is successful when....
(Solutions success measure)

As someone in
Sales Management

I want to
have a single version of the sales proposal that everyone has access to rather than managing multiple versions in email

Using
Microsoft Teams & a SharePoint site to centrally store and share a single version of a sales proposal that my team can edit together using co-authoring in Word and PowerPoint

I'll know this is successful when
my sales team creates proposals more easily, giving them more time to close deals

Success Story Outline

- One slide per story
- Store slides separately. Not as a deck.
- Tag with Year, Tool, and Business Contact
- One bullet point for each
  - Business issue
  - Solution
  - ROI = (Time before solution-Time after solution) X Average hourly rate
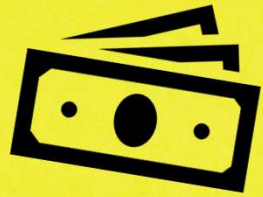
Simple Conservative ROI

- **Time before solution =**
  - Hours it takes 1 person **X** # of people **X** # of times per month **X** 12 months
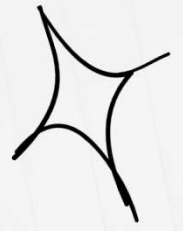- **Time after solution =**
  - Hours it takes 1 person **X** # of people **X** # of times per month **X** 12 months
- **Average Hourly Rate =**
  - Average pay per hour **+** Benefits (get this information from HR)

High Five - $24,640 savings per year

Business Need: Need to replace our third-party (Snow Fly) Rewards and Recognition tool due to high costs and limitations.

Solutions: Built a new solution in 24-hours using SharePoint to submit and store the "High Fives", Power Automate to process and notify recipients and managers, and Power BI to report on total number of recognitions per department and per manager.

  360 hours per year to administer Snow Fly
  - 52 hours per year to administer High Five solution
X $80 per hour average wage with benefits

$24,640 per year in savings (Not counting cost of Snow Fly)

Store Your Stories

- store individual slides in a SharePoint Library
- Create views by tool
- Use the following metadata:
  - Business Owner = Person or Group column
  - Solution Tools = Multi-Choice or Managed Metadata
  - Savings = Currency (Total this column)
  - Hours to build (optional) = Number no decimals

Rewards and Recognitions

Rewards

Lunch with CIO or CEO 💵

Champion Branded T-shirt 💵

Casual Day Certificate 🚫

Gift Cards 💵

A note card from the CIO or CEO 🚫

Training courses or conference 💵

Recognition

story in newsletter

Signature badge

Picture frame

New signature line

Success Story of the Month email
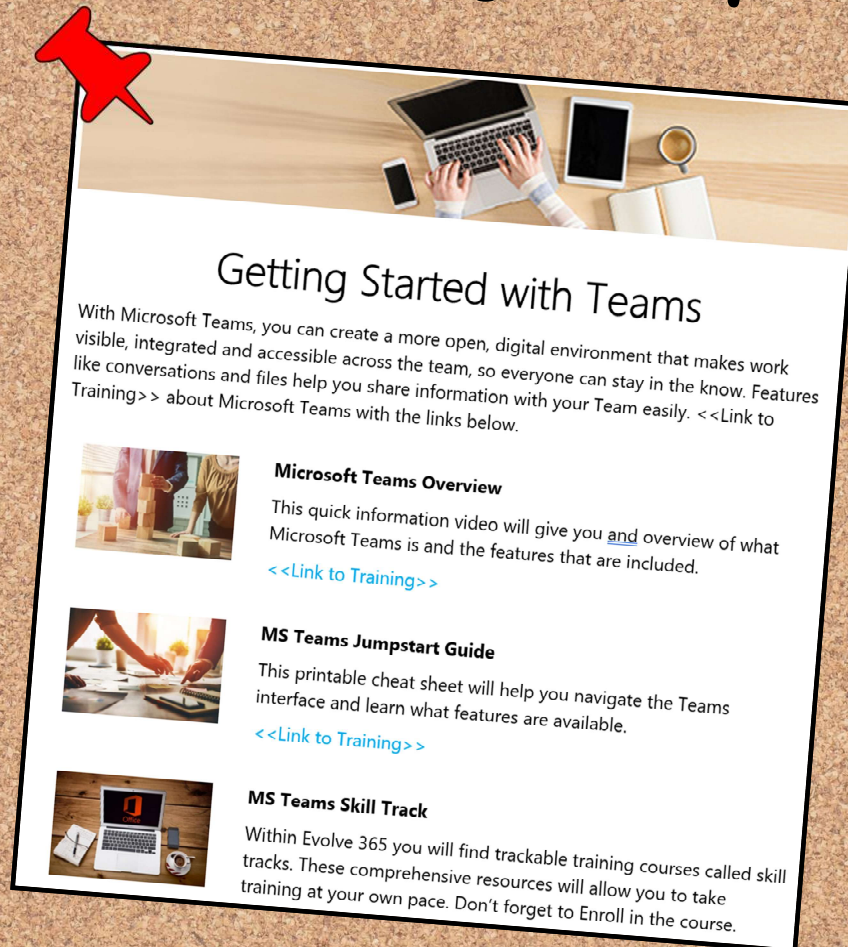
Teaching Opportunity

Get The Word Out

Channels

Email
Teams Posts
VIVA Engage
Posters
Intranet Announcements
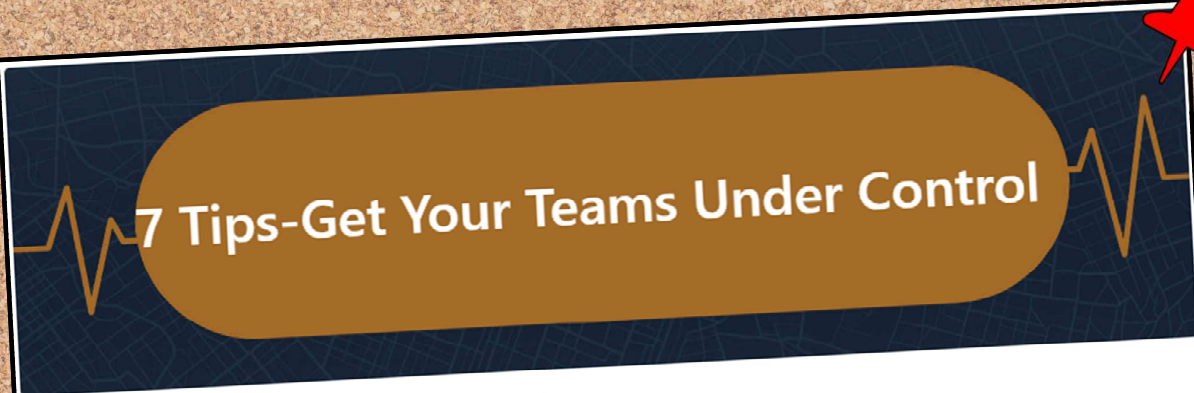Intranet Events
Champions — Word of Mouth

Frequency

Too little or too much is no good.
You need to find that sweet spot.
Reach out on a variety of channels on a cadence.
Sending new messages in each of the channels to reach all of your audience.

Email (Learning Campaign)

Getting Started with Teams

With Microsoft Teams, you can create a more open, digital environment that makes work visible, integrated and accessible across the team, so everyone can stay in the know. Features like conversations and files help you share information with your Team easily. <<Link to Training>> about Microsoft Teams with the links below.

Microsoft Teams Overview

This quick information video will give you and overview of what Microsoft Teams is and the features that are included.

<<Link to Training>>

MS Teams Jumpstart Guide

This printable cheat sheet will help you navigate the Teams interface and learn what features are available.

<<Link to Training>>

MS Teams Skill Track

Within Evolve 365 you will find trackable training courses called skill tracks. These comprehensive resources will allow you to take training at your own pace. Don't forget to Enroll in the course.

Teams Post

7 Tips-Get Your Teams Under Control

Today May 9, 2025 at 9:00am ET and 4:00pm ET

@Team

Topic: Microsoft Teams

Level: Beginner

Description:
Is Microsoft Teams running amuck throughout your day? Pinging and alerting you to everything even when you wish it wouldn't. It's hard to know which setting will turn off the exact notification you don't need to get.

In this webcast, we look at 7 tips to make your day much quieter, so you are getting the notifications you need without all the extra noise.

Join the 9:00am ET session
Join the 4:00pm ET session

see less

Training Sessions

Train the Trainer - What to Use When

We will get started shortly!

Planet Technologies | Evolve 365
Microsoft Learning and Adoption Service
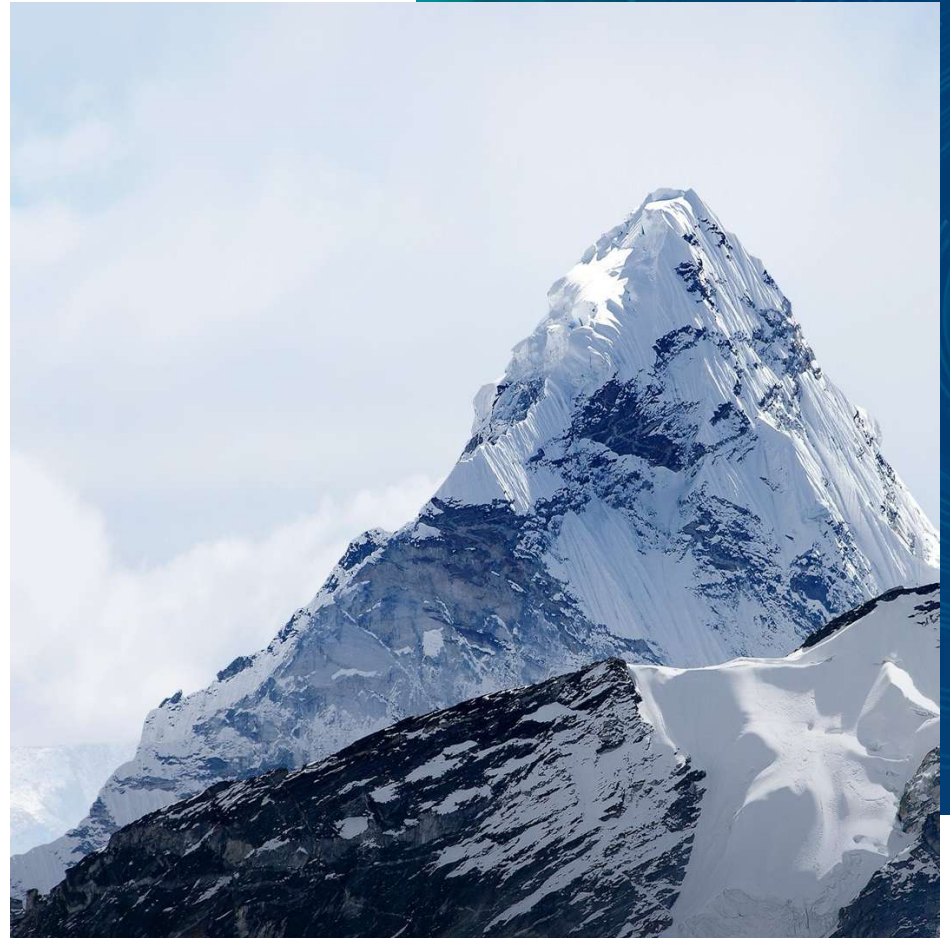
What's New in the Environment

Make sure Champions know what is happening BEFORE it happens
- Microsoft Road Map
- Message center notices
- Subscribe to "In the Know"

End User Training

- Introduction & agenda
- Use case
- Feature explanation
- Feature demo using use case
- Rinse and repeat (3 or 4)
- What did we learn
- Additional resources

Before You Start

Launching a Champions Program is just the beginning. You're not just building community—you're building infrastructure for scale. Identify roles, responsibilities, and repeatable processes from day one. Champions should know how the program works, not just why it exists.

Succession Plan

Every Champion is both a leader and a mentor. Start succession planning early—develop the next wave of leaders before you need them. The best programs thrive without you. Empower others to lead so the mission continues—even if you move on.

How can we grow leaders?

- Start with a leader and a plan.
- Have that leader identify and work with their replacement.
- Set a period (1 year / 6 months) and have the replacement step up as the lead. They will then find their replacement and rinse & repeat.

Ideas

Build a content library (FAQs, prompt guides, demo videos)

Peer-Led
- Champions mentor champions
- Regional / Role Circles
- Micro-events for themes

Refresh Cycles
- Rotate in new champions
- Invite feedback
- Adjust roles

Defined Growth
- Opportunities to lead, pilot tech, or advise leadership
- Clear "what's next" for Champions

Recognition Loops
- Regular shoutouts
- Annual awards or certifications
- Badging

Champions will help amplify org-wide messages or tech rollouts

Q&A

Any final questions for Tamara & Jennifer, or do you have any internal scenarios that you want to talk through with the group so we can brainstorm together?
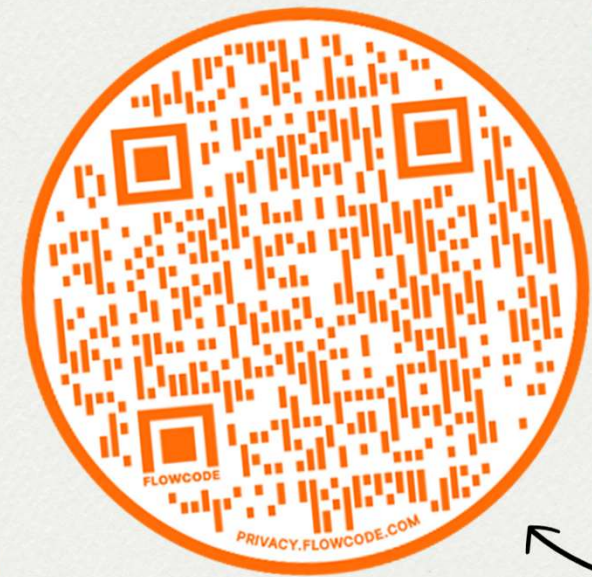
Presentation

Download presentations and resources at the following website:

https://go-planet.com/evolve365/champions-workshop/

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