

## Using M365 for true collaboration

Washington State has chosen to deploy the Microsoft M365 application suite across all 200+ state agencies. WaTech has installed the foundational tenant and is working with each agency to determine timeline and scope for implementation. The technology itself is not challenging to install – but which of the many new tools and features can be leveraged to improve collaboration and efficiency? An M365 implementation is an invitation to change behaviors and improve productivity.

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### The case for change:

Most divisions within the state utilize the Microsoft Office suite the same way they've been doing it for twenty years: create the artifact, attach it to an email, send it to someone, and then hang on to the email. If you're lucky, the author may have opted to place a copy on a shared drive and/or a SharePoint site. How to break out of that rut? Introduce M365 – but roll it out as a **productivity catalyst**.

- Use it to improve collaboration
- Use it to store and manage content
- Use it to improve productivity

### Historical context:

Microsoft has improved the M365 offering over the past generations. And since people have different strategies for using the platform, Microsoft provides many innovative options for performing a task. If businesses have not defined how they want to work together, individuals will find their own path. What, then, ends up happening? Content becomes disorganized and the teams become confused and frustrated locating and finding files and information. They end up blaming the technology when really it is attributable to a lack of business process and accountability.

### Our suggested approach:

FirstRule believes that **starting with process** will make the implementation and adoption of M365 applications go much more smoothly and offer more ROI.

1. Have a conversation about how you collaborate. Have an honest conversation about what would happen if email were not an option; what would you do? The goal of M365 is to make collaboration happen where the work is

taking place. For example, rather than commenting on a Word document and emailing that copy, make the comments within a shared version of the file. And with M365, the conversation can be had in a chat-like experience that it stays with the artifact.

2. Outline expectations for storing, managing, retrieving, and archiving content. Be sure to include any policies in the discussion. The goal is to maintain one version of an artifact for as long as is necessary – and no longer. Each artifact should reside in one location, not on everyone's individual hard drive. M365 allows groups to remove their dependency on nested files. Use metadata to organize your content. This will make things easier to find, store, and manage.
3. Once the other components are in place, you can build out other M365 features to improve productivity. M365 allows individuals to contribute to the same artifact at the same time. This is something Google has been doing for a while and now M365 takes the lead. With the addition of Teams and proper understanding of content management, team members can work together more easily.

### Anticipated results:

*One source of truth.*

*Better partnering.*

*No headaches.*

What's next for your organization? We'd love to be a part of it.

Contact us at (360) 280-6735 or [info@firstrulegroup.com](mailto:info@firstrulegroup.com)

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