9 Tips for a Successful Microsoft 365 Transformation

Organizational change of any size is rarely easy.

Now, imagine having to transform the way a highly distributed workforce communicates, collaborates, and ideates. For good measure, factor in the challenge of serving current and prospective customers while establishing your company as an independent enterprise.

This was the position we at Kyndryl found ourselves in late 2021.

A Business Imperative for Change

When Kyndryl launched as an independent company after separating from IBM in 2021, it created the world's largest IT infrastructure services provider. We emerged as a new organization with a unique vision for delivering signature employee experiences.

To support our fresh approach to doing business, Kyndryl needed to transition off existing technology platforms and exit

temporary licensing agreements we had negotiated. And we gave ourselves nine months or less to do it.

Fortunately, prior to the Kyndryl spin-off being finalized, our global IT organization had begun reimagining how to enable our workforce to work seamlessly in support of our customers, regardless of location. This gave us ample time to analyze numerous vendors and solutions before ultimately partnering with Microsoft, whose technologies could power our digital-first vision and sustain our hybrid workplace model.

Today, all Kyndryl employees use the Microsoft 365 platform and its suite of fully integrated applications to be productive and collaborative anywhere their work takes them. Our digital toolbox includes Exchange, Office, Teams, OneDrive, SharePoint, Planner, Power Apps, Power BI, and other applications, all supported by Microsoft and Kyndryl security products. We also have an IT framework and new capabilities built on Microsoft Azure that can evolve as our company grows.

Perhaps as importantly, we've garnered valuable lessons that others can use when plotting their course for transformation. So, if your company is thinking about moving to Microsoft 365 or embarking on another campaign of comparable size and scope, Kyndryl's Digital Workplace Services practice has the experience and expertise to support your transition. Meanwhile, here are nine tips we believe are crucial to success:







Our business success hinges on enabling each Kyndryl employee with capabilities and toolsets that foster communication, collaboration, knowledge sharing and seamless front-through-backoffice operations."

-Michael Bradshaw, CIO, Kyndryl



Focus on your employees. If you subscribe to the idea that the employee experience¹ is inextricably linked to the customer experience, you must keep the overall well-being of your team at the core of all you do. This was key to our Microsoft 365 strategy.

For example, as Kyndryl began its journey as an independent company, we opted to retain our existing technology stack in the near term. Change was already happening at all levels of the new company, so we felt it would be easier to begin operating as a business and serving clients with the tools our employees were accustomed to and understood and then plan for a more comprehensive transition in the future.

This decision, among others, made the change process a little less overwhelming. It also showed employees that we empathize with the challenges they might encounter during our transformation, further underscoring our organization-wide commitment to fostering greater personal and professional balance.





Involve multiple departments. It was a given that the CIO office—comprised of seven operational verticals executing Kyndryl's internal IT strategy—would drive our migration to Microsoft 365. However, the ride would have been much less smooth without input, support and guidance from colleagues across the organization. Case in point: our procurement department.

Licensing can be incredibly complex, but our procurement leader spoke the language and was engaged from the beginning. He was instrumental in putting together temporary software licensing arrangements as we spun off and later as we negotiated new agreements. Thanks to his efforts and countless others on the procurement team, we had our Microsoft licensing in place by early December 2021.

Our internal corporate communications team played an equally pivotal role in meeting our ambitious timelines. As soon as our separation was complete, our internal and corporate communications teams began formulating our transformation story and identifying optimal dates and channels to distribute the information.

At the technical level, we tapped into the collective expertise of Kyndryl's Digital Workplace Services (DWS) practice. Our Microsoft Center of Excellence leader served as an internal consultant, offering insights and guidance to complement the implementation strategy and application roll-out being led by Microsoft's deployment team.

Meanwhile, the CIO office's Messaging and Collaboration group, directed by a collaboration manager who had previous Microsoft licensing experience, provided operational support and worked with the CIO Identity and CISO teams on implementation. Their work proved invaluable as we onboarded new systems and harmonized related processes.

The truth is that every department has played a vital role in our Microsoft 365 migration. From New York to Bangalore—and at every Kyndryl office and remote workstation in between—we've found that it truly takes a village to effect change at scale.



- Create a change management strategy. Long before initiating any sizeable transformation, you must plot a detailed course for your journey. Our CIO office, working in tandem with key Microsoft advisors, spent the latter half of 2021 and the early part of 2022 mapping, refining and solidifying a three-phase strategy to steer our platform migration:
 - Phase 1: Following several months of behind-thescenes work, we began activating tools in the Microsoft 365 tech stack. The first apps we brought online were SharePoint, Teams, and OneDrive, with a soft launch in early April, followed by staggered activations of Whiteboard, Yammer and other 365 tools. In June, we also started sunsetting the tools in our previous tech stack based on the expiration dates of their respective licensing agreements.
 - Phase 2: Initially, Phase 2 will focus on finishing the
 migration of all Kyndryl data on our existing storage
 platform to OneDrive and launching Microsoft Power
 Platform. This collection of business apps aggregates
 data across the organization and will allow us to create
 local workflows using low-code and no-code programming. Efforts will then shift to implementing Multi-Geo,
 enabling us to provision and store data in geolocations
 outside the United States.
 - Phase 3: Once the foundational phases of our migration are complete, we'll begin the gradual implementation of Microsoft Viva. This employee experience platform will unify critical components of Microsoft 365 into a single platform to further enhance communications, knowledge sharing, learning, and distribution of resources and insights across our organization.



Appoint champions of change from within. Rather than trying to mandate acceptance of our migration from the top down, we recruited employees throughout the organization to serve as internal advocates who could generate excitement around the launch of our Microsoft applications and accelerate adoption among coworkers. We provided opportunities to increase their learning experiences and knowledge of the tools, so they could successfully disseminate communications, product updates, and general application knowledge in a peer-to-peer format.

Today, our Microsoft Champions group includes roughly 2,300 Champions in more than 56 countries. They invest countless hours working with Microsoft to become experts on the tools and host monthly Teams calls to share insights and brainstorm ways to:

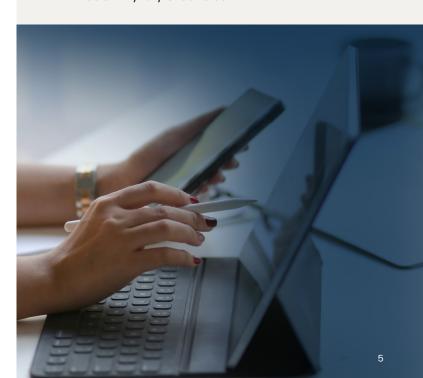
- PROMOTE the usage of all Microsoft applications at our disposal
- ENCOURAGE peers to become familiar with the tools to use them effectively
- SHARE any tool knowledge with Kyndryl peers

True to their mission, our Champions teach other employees how to get the most out of the various applications. They've collectively taken the reins and started directing their training initiatives, going so far as creating workflows, producing videos, and developing numerous other processes to engage employees and gain buy-in.



Develop a robust training program. Education is key for enablement, so we turned to Microsoft and other trusted partners to help us create a comprehensive instructional strategy. Our offerings currently include:

- "Office Hours"—Microsoft regularly hosts live training sessions for Kyndryl employees who want virtual instruction on various Microsoft tools. Sessions are offered in English, Spanish, French, Portuguese and Japanese, as well as multiple time zones and experience levels to accommodate the varied needs of our employees. We also record each session, so anyone who can't attend live sessions can access the videos anytime.
- QuickHelp—We partnered with BrainStorm to offer QuickHelp, an on-demand program that provides training in Microsoft applications based on each employee's job and skill set. The platform, which is integrated into our Microsoft 365 Hub on Teams, features short videos in 40 different languages, as well as live events, practice exercises and other tools to help employees learn in a way that fits their style and schedule.
- Tech Sessions—Our CIO Service Desk and Onsite team created Tech Sessions, an interactive platform where employees can sign up for additional learning on select products and services. The educational sessions, which are also delivered in multiple languages, are designed to help team members understand and better utilize the tools in Kyndryl's tech stack.



Communicate early and often. In late January 2022, Kyndryl's chairman and CEO, Martin Schroeter, kicked off communications for our transition to Microsoft 365 with an Open Mic livestream. During the video call, he shared news about our new Microsoft partnership and announced that our entire company would be moving to the 365 platform, promising more details in the weeks ahead.

Soon after, we began crafting a video to outline the move to Microsoft 365 and explain how the new tools would help create a seamless working experience. The message showcased our CIO's visionary approach to change management, reflecting his belief that replacing Kyndryl's tech stack would dovetail with the cultural transformation taking shape within the company. We shared the video on April 4 to coincide with the soft launch of select Microsoft tools and the official kickoff of the more extensive migration campaign.

At the same time, we were working with our corporate communications team to develop additional videos, blogs, newsletter articles and "A Microsoft Story." These weekly posts, which began circulating in June, chronicle Kyndryl's transition to Microsoft tools and provide

information about past and upcoming milestones.

Gradually, we started unveiling three collaboration hubs that have become essential components of our ongoing communications:

- The Heartbeat, our SharePoint-based company intranet site where information, announcements, and links to related sites are posted and continually updated
- Office@Kyndryl, an information repository that features news, FAQs, best practices, and quick links to application-specific instruction and insights
- M365 Hub, a one-stop shop on Teams where employees can find news, training, and other Microsoft tools-related content

Finally, to ensure consistent messaging flows from the CIO office, we hired an on-staff content creator and user experience (UX) focal to manage our communications and user experience projects. She collaborates with the corporate communications team to produce long-term plans with weekly communication deliverables, maintaining a regular cadence of information and advancing our transformation narrative.





Remain transparent. If you don't have answers to everything—and you won't—admit it. Be honest and tell people, "Hey, we don't have an immediate solution to your problem, but we welcome feedback. We'll figure this out together and get where we need to be. We just ask for a little patience."

By remaining transparent, we've strengthened relationships and built trust with employees throughout the company. This is serving us well as we continue our workplace transformation and promises to pay even larger dividends within our organization and beyond as our company strengthens its position in the market and grows.

Anticipate bumps in the road. Not surprisingly, there were missteps on our journey to Microsoft 365. Rather than fixate on what went wrong or who was to blame, we promptly addressed issues and used the experience to guide our way forward.

For example, the transformation team planned to allocate two terabytes (2TB) of storage space for every employee. However, users had far less storage once the tools went live. After some troubleshooting, our engineers realized specific settings configured during the testing stage didn't replicate when the system went live. They quickly corrected this potentially significant error with minimal downtime or disruption.

Even though we don't dwell on choices made in the past, we'd likely do some things differently.

For instance, we couldn't launch the entire Microsoft 365 suite in April, so we decided not to activate Yammer at that point, relying instead on Teams for all internal communication not conducted over email. This approach was functional, but a Yammer community would have proven more effective for larger groups looking to exchange less-urgent information and establish connections for colleagues with common interests.

Bottom line: You'll make certain decisions along the way that, in hindsight, may not be the best. The key is to help everyone adjust, work toward a better outcome, and learn from the experience.





Reimagine your measures of success. At some point, you'll have to measure the performance of any large-scale initiative you undertake. However, our Microsoft 365 transition focuses on qualitative assessments rather than traditional metrics like ROI and cost savings—at least until our migration journey is complete.

In the short term, we're using the ramp-down of existing applications and the adoption and usage of our new tools as key performance indicators. We draw insights from the net promoter scores that Microsoft collects and pay close attention to the comments and suggestions we receive through the Teams feedback function.

Eventually, we'll use new tooling methods to fully track user sentiment, engagement and productivity, which are critical to enhancing business outcomes. Specifically, we plan to measure workplace experiences linked to:

- User satisfaction: User contentment
- User effort: Amount of input required from a user to complete a task
- User outcomes: Results for users, including increased productivity
- User impact avoidance: Removal of a negative event

Until we have all our new systems and processes in place, we're most concerned with making the migration experience as efficient as possible for employees and equipping them with the resources they need for success.

Change in Context

History is riddled with companies that failed at change—or, at a minimum, failed to do it well.

By embracing your organization's current challenges and anticipating those that have yet to come, you can recast perceived disruptions as catalysts for progress.

Then, your entire organization will be well-positioned for genuinely transformative change.

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1. "Is Employee Experience the New Customer Experience?", SHRM, 2022