



# Boost Bank Efficiency with Microsoft 365

4/26/2023



**SYSTEMS**  
engineering

# Introductions



Kevin Cloutier  
Client Success Manager



Chris Vermette  
Technology Consultant



## ABOUT US

Established in 1988, Systems Engineering is 100% employee-owned organization serving more than 500 clients nationwide. We provide our clients with IT leadership, innovative solutions, and deep expertise that moves their businesses forward securely.



Managed Services Provider  
*Locations in Maine and New Hampshire*



Security Centric | Risk Management Focused  
*SOC 2 Type 2, Risk Assessments, Security Operation Center for event monitoring and incident response, deep expertise with Microsoft EM+S*



Managed Microsoft Partner  
*Microsoft partner since 2003, Microsoft Direct Cloud Solutions Provider (CSP), Azure, & M365 Premier Support*



ESOP Organization since 2007  
*Employee Stock Ownership Plan. We own it.*



180+ professional consulting and technical resources with deep expertise  
*Available 24x7, 365 days per year to meet client needs*



# Boost Bank Efficiency Timed Quiz

POWERED BY:



MAINE **BANKERS**  
Association

2023 Bank Expo

Visit booth #23 for details  
Winner announced at 2:15pm

# Goals

- Discuss the concept of digital transformation with Microsoft 365
- Discuss How You Can Leverage Modern Technologies to Stay Competitive
- Show How You Can Enhance Employee Experience & Efficiency
- Convey the Value of a Culture of Continuous Learning and Productivity









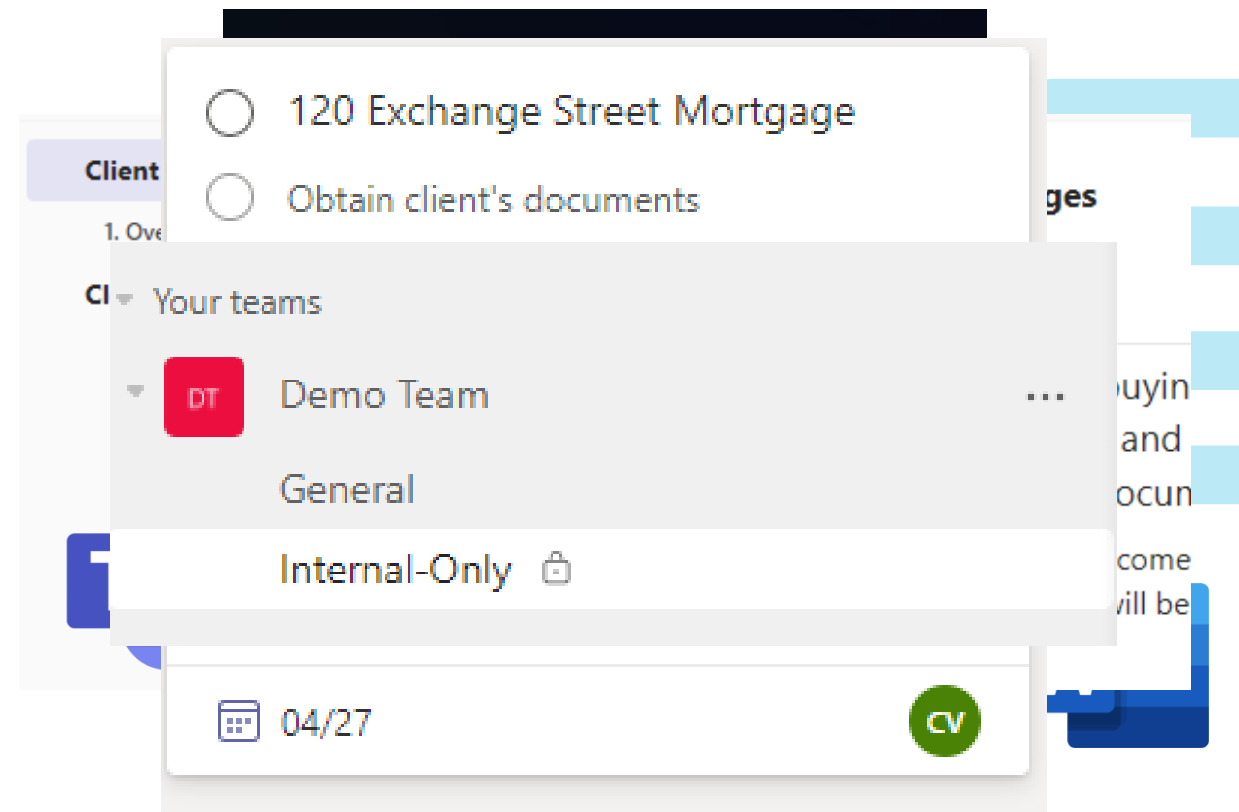
# Simplify Collaboration

## Use Teams to Increase Efficiency

- File co-authoring
- Easily accessible documentation
- Manage tasks and Projects

## External Collaboration

- Segmented access
- Securely converse and meet with external resources your users work with often
- Board member access





# Centralize Company Resources

## Company Intranet

- HR Resources
- Centralized documentation
- Company directory

## Document Libraries

- Easily managed libraries

Docum

You need

I'd like access, please.

PowerApps

The image displays two screenshots of a company resource management system. The top screenshot, titled 'EMPLOYEE DIRECTORY', shows a grid of employee profile cards. One card for 'Chris Vermette', a Technology Consultant, is highlighted. To the right, a detailed 'Employee Details' form is visible, containing fields for Employee Account, Position, Division, Manager Account, On-Call Contact Number, and Floor/Location. The bottom screenshot, titled 'ORGANIZATION CHART', shows a hierarchical tree structure. At the top is 'Matt McGrath President'. Below him are several director roles, including 'Director of Engineering' (which is highlighted with an orange box), 'Director of Finance & Administration', 'Director of Product Management', 'Director of Project Management', and 'Director, Advisory Services'. Under the 'Director of Engineering', a list of roles is shown, including 'Senior Engineering Manager', 'Infrastructure Manager', 'NOC Manager', 'Security Manager', and three 'Solutions Architect' roles. To the right of the organization chart, a 'Reporting to:' section lists various teams and roles, including 'Core Engineering', 'Core Team1', and 'Core Team2'.

# Employee Experience



- Modern Collaboration and effective teamwork
- Empowers productivity improvements
- Personalized Experience
- Hybrid Work Capabilities



# Where do I start?

- OneDrive is a Great Starting Point
- Ease of Collaboration
- Reduces on-premise storage needs
- Allows for more control over company data and files



# Enablement and Adoption

- Step 1: Assess Current State
- Step 2: Define Objective and Goals
- Step 3: Develop a Communication Plan
- Step 4: Provide Training Resources
- Step 5: Establish Ambassadors
- Step 6: Pilot and Test
- Step 7: Roll Out
- Step 8: Foster Collaboration and Knowledge Sharing



# Step 1: Assess Current State



## Classify the types of data

- Where the data lives
- How it is accessed
- Who/what accesses it

## Review and Document Department Workflows

- Understand how each department operates

## Step 2: Define Objective and Goals

What are you looking to gain from the cloud?

- Increase User Flexibility?
- Reduce/Remove the reliance of on-premise systems?
- Improve Communication/Collaboration?
- Enhance productivity?

# Step 3: Develop a Communication Plan

- Determine communication channels
- Develop a timeline
- Craft your message
- Create communication materials
- Include training resources

## Step 4: Provide Training Resources

- Partner with IT on current training programs
- Platform for on-demand training
- Customized learning paths
- Accountability and progress tracking
- New Hire process

## Step 5: Establish Ambassadors

- Identify users that can and want to “own” various aspects of the M365 that you plan to incorporate
- Provide them the tools to support the upcoming changes. Bring them into the plans prior to moving forward with future steps
- These “Ambassadors” can reduce the strain on IT during the testing and roll outs, but could also add valuable insights into the people and processes these changes will affect



# Step 6: Pilot and Test



## Identify Pilot Groups and Functions

- Choosing a team/department
- Choose the relevant test function(s) for the chosen team(s)

## Constant Feedback

- Maintain open lines of communication with testers

# Step 7: Roll Out

## Pilot Expansion Path

- Safe but slow
- Runs risk of never ending
- Increases/extends change anxiety for users

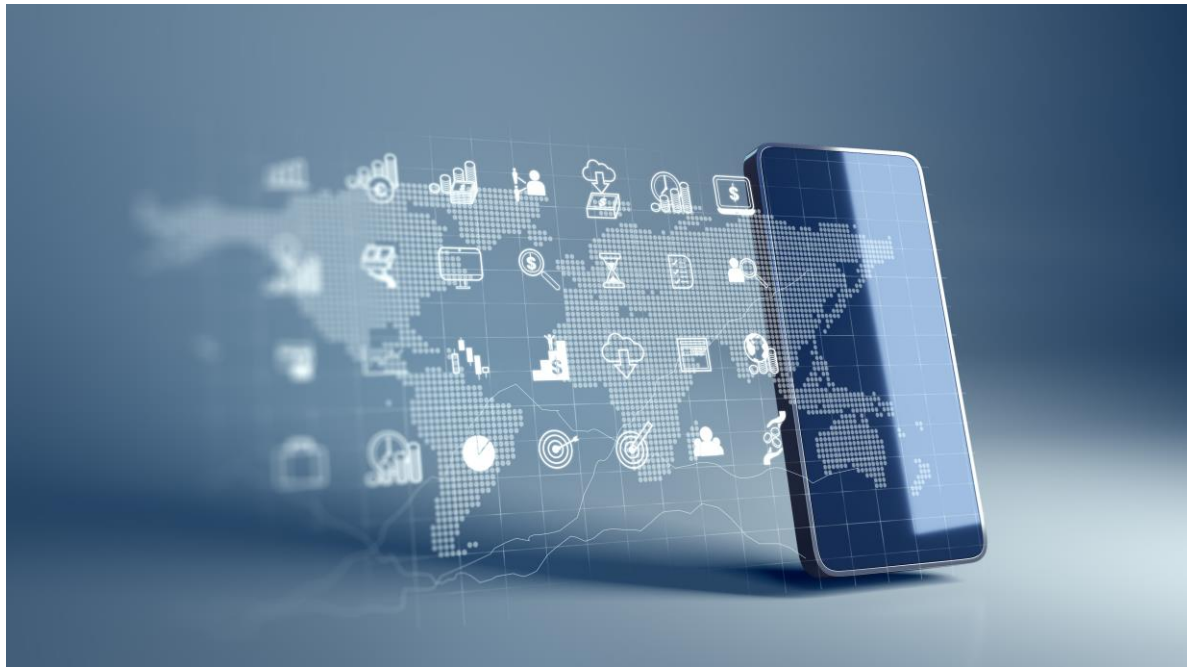
## Wide-Scale Enablement Path

- Shorter-term but higher strain
- Higher probability of completing
- Quicker adoption

# Step 8: Foster Collaboration and Knowledge Sharing

- Encourage open communication
- Create a community of practice
- Celebrate success

# Continuously Learning





## Course Library

Narrow results by:


ALL

**BASE CHANNELS**

PRIVATE CHANNEL

EXTENDED LIBRARY

### Base Channels



Microsoft Teams



Office 365



Office 2019




Microsoft Windows



Microsoft 365 Apps



Office 2021



Additional Training





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# Questions?

