regroove

TRANSITIONING TO
MICROSOFT 365

BUSINESS PROPOSAL

PREPARED BY

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ABOUT THIS RESOURCE

FROM REGROOVE TO YOU

This 15-page instruction book provides a step-by-step outline of how to create a business proposal that can be submitted or presented to the decision-makes at your organization. It outlines every step, from identifying your business needs to conducting an options analysis, with sample language provided for each section. Each section includes both instructions on what information should be included and examples. We offer a strategy for identifying the risks and benefits of moving to Microsoft 365. You will even find a detailed outline of every step involved in a Microsoft 365 migration.

EXECUTIVE SUMMARY

The Executive Summary is a high-level description of what you are proposing in your business case. It should be at the beginning of your document, but it might be the last piece that you write, as it brings together all of the benefits you outline in the rest of the proposal.

EXAMPLE:

Pear Inc. is a strategy and leadership consulting organization that works with other companies to provide coaching and consulting. We are currently using Outlook, but our files are located on a server in the office. Our new corporate policy allows staff to work from home up to four days a week. To maximize collaboration and productivity while establishing a work from home environment, the Business Analyst team is recommending that Pear Inc. migrate all business practices to Microsoft 365. This includes a SharePoint Intranet for employee engagement and Microsoft Teams to enable our staff to communicate and collaborate in real-time from anywhere.

BUSINESS NEEDS & DESIRED OUTCOMES

The first step in an effective business case is to describe in detail the challenge currently facing the organization. This will form the basis of your recommendation. In this section, you will want to consider not only the current challenge the business is dealing with, but the broader organizational structure and culture as well.

ORGANIZATIONAL OVERVIEW

EXAMPLE:

Pear Inc. is a progressive organization that aims to work with leaders who embrace transformative decision-making. We assist organizations in expanding their executive and leadership capabilities, improving their corporate culture, and implementing new strategies.

Our strategic goals include:

- Becoming an example of a local, modern workplace that implements best practices in leadership, human resources, and technology to build a better business.
- Becoming experts on leadership and management coaching in the local area.
- Attracting top talent from across the country to work with us as coaches, consultants, and promoters.

BUSINESS NEED

Clearly describe the business need in a statement that addresses the root of the problem.

EXAMPLE:

In order to expand our pool of potential candidates and offer our current employees the ability to create a hybrid work schedule, we need to improve our ability to communicate and collaborate effectively outside of the office.

BUSINESS OUTCOMES

Describe the expected benefits that the organization is striving to achieve by implementing change.

EXAMPLE:

There are multiple benefits to improving our ability to communicate and collaborate remotely, including:

- The ability to attract top candidates from across the country.
- Offering our current employees an effective way to work from home or the office, solidifying our hybrid work structure.
- Giving staff the ability to quickly and easily connect to office resources while travelling or working onsite at client locations.
- Reduced hardware, maintenance, and development costs.

REQUIREMENTS OF THE SOLUTION

Describe the key high-level requirements of the solution that would solve the business need.

EXAMPLE:

There are three key requirements of the solution:

1. The solution must provide an option for communicating via text, audio, and video from the office as well as from home or on the road.
2. The solution must provide a secure place for files to be stored.
3. The solution must provide an option for co-authoring files.

CONSTRAINTS

Describe any constraints that place limits on the solution, such as regulatory or compliance policies that restrict or require certain features.

EXAMPLE:

There are two constraints placed on the solution:

1. Company data must be located in Canada.
2. The solution must offer an option for multifactor authentication.

ANALYSIS

In this section, you will present the possible options for solving the business need and discuss the benefits and advantages for each option.

POSSIBLE OPTIONS

Describe possible solutions that could solve the business need; demonstrate your due diligence in determining the best course of action.

EXAMPLE:

	Google	Dropbox	Microsoft 365
Data Residency	USA	USA	Canada
Authentication	Two-factor	Two-factor	Multifactor
Benefits	14-day trial 2000-5000GB+ of storage	2000GB+ entry level storage	Flexible licensing Cloud/desktop apps 1TB per person of storage
Disadvantages	Cloud apps only Less entry-level storage (30GB+)	No communications platform	Complex licensing

RECOMMENDATION

In this section, you will outline in detail which course of action you are recommending and why. You will go into more detail throughout this section, so keep your initial recommendation brief.

EXAMPLE:

Given the specific need for data residency in Canada and the requirement for multifactor authentication, Microsoft 365 is the obvious choice for Pear Inc's needs. Microsoft offers a number of benefits beyond these specific requirements, and represents an opportunity to expand into automation and additional tools in the future.

COST

Provide a brief summary of the preferred options costing estimates.

EXAMPLE:

User Level	# of Users	License	Cost
Administrator	4	E5	$38/user per month
Management	4	E5	$38/user per month
Regular	4	E3	$23/user per month

RISKS

Identify the specific risks of the recommendation and prevention measures.

EXAMPLE:

Risk	Probability	Impact	Prevention
Incompatibility with existing architecture	Possible	High	- With Regroove experts, an inventory of current systems will be developed and tested in the new environment - Any systems not compatible will be replaced or replicated in the new environment; this plan will be developed before the migration takes place
Lack of clear migration strategy	Possible	Moderate	- Regroove will develop a detailed migration plan; employees can review progress on a public site - Departmental Business Champions will be involved in migration planning and will be responsible for communicating the migration strategy to their teams
Data loss or breach	Unlikely	Extreme	- Pear will employe Regroove, Microsoft 365 experts, to implement security best practices - Pear will require all employees to use multifactor authentication

IMPLEMENTATION PLAN

Outline how the solution will be implemented. Include a work plan and change management considerations. Regroove creates all implementation plans for our clients.

EXAMPLE:
Pear will work with cloud migration experts, Regroove Solutions Inc., to implement Microsoft 365 in the following phases:

Phase	Schedule
Project Planning • Kickoff meeting • Technical assessment	1 week
Multifactor Authentication Implementation • Requirements gathering meeting • Conduct rollout • Provide post-implementation support • Provide technical documentation	1 week
Azure, Endpoint and Intune Implementation • Requirements gathering meeting • Configure client applications • Prepare communication for end users • Deploy to devices • Provide post-implementation support • Provide technical documentation	1 week

Phase	Schedule
Teams and SharePoint Migration • Current environment assessment • Governance meeting • Data inventory • New environment planning meeting • Finalize migration plan • Create sites and teams • Finalize permissions • Run first phase migration • Conduct pre-migration coaching • Run final migration • Apply permissions and security • Conduct post-migration coaching session • Provide post-migration support	8 weeks
Teams Automation Implementation • Requirements gathering meeting • Develop flow and wirefame • Build and test automation • Transfer to client environment • Provide technical documentation • Provide post-implementation support	2 weeks
Coaching • Microsoft Teams for End Users • Microsoft Teams for Administrators • SharePoint Online for End Users • SharePoint Online for Content Administrators	2 weeks

PROJECT MANAGEMENT

Demonstrate the project management methodology the organization will apply to manage the implementation of the solution.

EXAMPLE:

The project will employ a hybrid approach to project management, combining the plan-driven Waterfall methodology with the adaptive Agile methodology. This empowers the team to respond to changing technology while maintaining linear progression towards a stated end goal.

CHANGE MANAGEMENT

Describe the change management strategy the organization will employ to ensure the solution is effectively adopted.

EXAMPLE:

Our change management strategy centres around three concepts:

- Employing a Business Champion for each business area to provide information about their processes and to communicate to their team throughout the project.
- Providing regular updates about the project to end users.
- Providing in-depth coaching to end users to ensure they understand the functions of the solution for best adoption.

NEXT STEPS

In this section, you will outline your recommended next steps.

EXAMPLE:

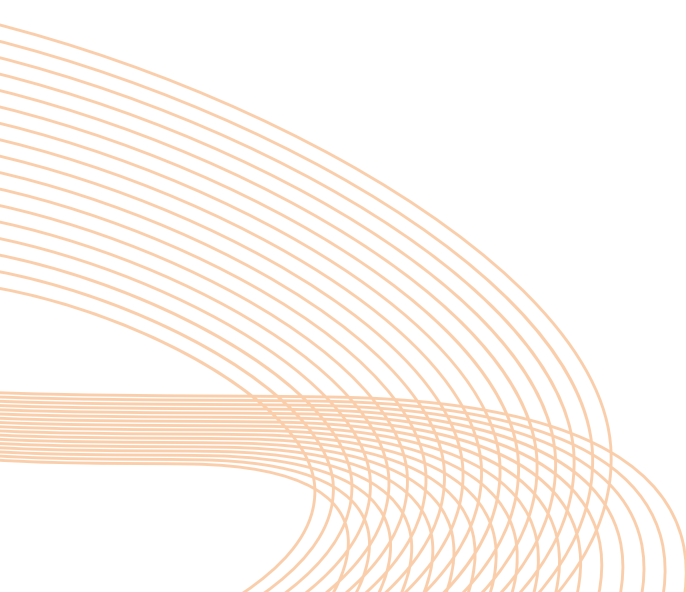Should the recommended solution be accepted, next steps include:

01

Selecting the business champions for each department.

02

Scheduling the project kickoff meeting.

03

Generating a communication to end users about the project scope.

CONTACT US.
WE CAN HELP!

This resource is intended to guide and support your organization as you decide whether to make the transition to Microsoft 365. We specialize in making the migration to Microsoft 365 smooth for our clients and we can do the same for you.

If your organization would benefit from customized support, please get in touch with us.

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