The Definitive Guide to Microsoft 365 Intranets & Digital Workplaces

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1. INTRODUCTION

Whether you are looking for your very first intranet and digital workplace provider, or a refresh of an existing portal, it has never been a better time to look toward the suite of applications you may already have at your disposal, Microsoft 365. The application bundle providing users with office tools like Word, PowerPoint, and Excel has also provided organizations with premium intranets and digital communication and collaboration platforms.

Microsoft is stacked with applications ready to help you accelerate your digital communication. Digital environments and interactions can positively impact employee morale and your entire organization's efficiency. The reason is simple: your employees will be more motivated and less anxious.

Remote workers face the same issues they were facing previously, only now there are more remote workers. In the State of Remote Work report, Buffer reported that **22% of remote employees surveyed** identified their **biggest struggle as collaboration and communication**, and **19% felt lonely**. Luckily, Microsoft 365 can help with Microsoft Teams, SharePoint, and Yammer.

The question for many companies is no longer "should our Intranet be built with Microsoft 365?" but how to best integrate Microsoft 365 (as a set of digital workplace tools) into your Intranet strategy, plan, and design.

At the end of this whitepaper, we believe that you will agree that your company should not only be building your intranet and portal on Microsoft 365 but actively working to better integrate and enrich it with Microsoft 365's continuing innovation.

In this whitepaper, we will explore the benefits Microsoft 365 brings to an Intranet, why you should consider migrating your existing Intranet to Microsoft 365, and when and how you may

integrate the application suite with your current intranet today. This whitepaper is a summary of our advice, guidance, feedback, and lessons learned from our team and the many organizations we support currently running their Intranets on Microsoft 365.

2. SHAREPOINT AS YOUR INTRANET AND OTHER KEY MICROSOFT 365 DIGITAL WORKPLACE

For over a decade, companies have been relying on SharePoint for their Intranet. A strong indicator of its relevance is how many times the application has been the foundation for the Neilson Norman award, the equivalent of winning a Grammy in the Intranet space. We are proud to say that our team has been behind a number of these award-winning intranets. While many already leverage SharePoint as the foundation for their Intranet, the platform has taken things up a few notches over the last years.

Their modern UI/UX is as simple to use a Squarespace website and as easily configurable. If you are not already using SharePoint for your Intranet, you should know its user base has doubled year-over-year, and it is for a good reason.

SharePoint continues to be at the heart of Microsoft 365's digital workplace solutions. Its core purpose of improving the overall employee experience and engagement through effective communication and collaboration is well aligned with Microsoft's commitment to a better digital workplace, and the results have been outstanding.

2.1. How other key Microsoft 365 Digital Workplace solutions benefit your digital workplace

Along with leveraging SharePoint as your intranet, Microsoft 365 excels at providing other solutions that bring your entire digital communications and collaboration together under one synergistic umbrella. Two of the platform's standout stars include the fan-favorite Microsoft Teams and the community-building marvel, Yammer.

2.1.1. Microsoft Teams as the hub of work

Teams is a perfect example of Microsoft innovation at work. It combines video conferencing and collaboration tools into a streamlined productivity machine. Also, while Teams has seen tremendous success of late, Microsoft has not slowed the pace of innovation in this tool and continues to push the boundaries of communication and collaboration in the digital age. If you

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have not already, it has never been a better time to join the **115 million daily active users** in improving the way digital communication and collaboration happens.[1]

Keeping everyone connected

Microsoft Teams brings employees together at both the functional and cross-functional levels (e.g., a project team). An optimized environment is easily customized, and the integration possibilities are expansive.

A few ways Teams keeps you connected:

- Teams and channels can be set up to align with your unique organizational needs, ensuring the right people are part of the conversation.
- Different teams can choose to provision different apps to connect them to other essential data sources or content repositories.
- Each team can have its own set of configured navigation Tabs, ensuring that team members have quick access to what matters to them.

When your team is working in harmony, you will see a rise in productivity and, ultimately, time saved.

Time Saved

By facilitating improved communication and collaboration, Microsoft Teams should enable more camaraderie and co-learning, but there will always be a need for essential HR and IT-related questions to be answered. Rather than spending needless time searching or interrupting colleagues with personal questions, adding a Teams chatbot to automatically answer general questions can help you achieve another big win. Forrester projects that **chatbots can reduce the burden on Help Desk and HR requests by 10% to 15%**.

Applied Communication and Collaboration Benefits

The possibilities for different configurations of the application – targeting specific departments or needs - are endless. One of the examples mentioned in Forrester's report related to the healthcare sector, where **"a healthcare worker company used Teams as a space for doctors and nurses to collaborate in real-time on treatment at a patient level."** Stated the TEI report.

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[1] https://www.theverge.com/2020/10/27/21537286/microsoft-teams-115-million-daily-active-users-stats

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This innovative use of Microsoft Teams **saved physicians and nurses between 30 and 90 minutes per day** by streamlining processes and eliminating inefficiencies. Thanks to this streamlined approach, those same physicians and nurses will **save between 65 and 108 hours** in a year.

2.1.2. Yammer as your breakroom

Since most of the buzz has been around Microsoft Teams, you might be wondering, "is Yammer still relevant?" Absolutely, and it has advantages you will want to leverage on your journey to a more social digital workplace. Yammer is a great place to have social interactions between colleagues without adding more noise to your Teams' channels. Instead, save those conversations for Yammer.

A new look and a more precise focus

Yammer had a challenging road to find the right place for its community-based platform, but 2020's #YearOfYammer brought about many improvements to the application and a more precise focus. Yammer is a brilliant application to build communities - on or off-topic. Its fresh look and feel embrace relevant social media fundamentals, something that can work exceptionally well.

More 'breakroom' elements

Yammer communities are a fantastic opportunity to push individuals to embrace their unique interests and bond with others that may not have otherwise had a chance for dialogue. These communities should have a champion that is passionate about the subject to ensure discussions remain productive.

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Some may lean on Microsoft Teams, and depending on your organization's size, that might make sense. However, Teams has become the home base for many organizations, and moving to another application might be just what your employees need to feel like they are taking a break. Integrating Yammer conversations in Microsoft Teams is also possible and can be the right solution if you want to separate work and social elements but stay in one application. This kind of flexibility in the platform means that organizations can select a model that works for them.

While creating non-work-related environments may sound like a barrier to your employees' productivity, a happy workforce is proven to deliver better results. Especially today, with so many suffering from a debilitating feeling of social isolation, giving employees an outlet to discuss and share personal interest is more important than ever.

There is also a genuine application of Yammer for work-related topics, such as organizational Q+A with leadership, or for a host of communities of practice dedicated to excellence in core business competencies.

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3. BENEFITS OF A MICROSOFT 365 INTRANET & DIGITAL WORKPLACE

This outlines vital benefits that can be realized by planning, investing, and implementing more SharePoint and Microsoft 365 capabilities within your organization's Digital Workplace.

To support and improve organizational understanding of the benefits Microsoft 365 will provide, we have identified over 40 key benefits that directly align with the fundamental digital workplace drivers of simplification, engagement, and productivity. Of these benefits, 70% have been proven, based on industry experience, to have a high, significant, and notable impact on the business and should deliver considerable business value. For an organization of greater size, this represents a potential positive impact of millions of dollars in cost savings, productivity gains, and simplification.

3.1. Key Assumptions

Microsoft 365 Fully Available to All Users - There is a broad and generalized assumption that was used when preparing this document that any Microsoft 365 capability available from Microsoft would be enabled and available within your organization for the business to benefit from, if not immediately then in the near term.

The Importance Of 3rd Parties - There are other notable 3rd parties in many cases that your organization should consider when requirements are more detailed, and additional planning work should be done if Microsoft 365 is selected as the go-forward platform. For context, Microsoft has stated (May 2016) that Microsoft SharePoint has a $10,000,000,000+ solutions ecosystem, so there are many options available, and this is one of the competitive advantages Microsoft has as a platform versus other key platforms.

Behaviour & Cultural Change Planning Should be Aligned – Within this document, we focus on how technology enablement can yield significant benefits. However, realizing or maximizing those benefits or getting meaningful user adoption around key capabilities will require behavior and cultural changes throughout an organization. This isn't because SharePoint, Microsoft 365, or the 3rd party products can't help, but because users may need to change the way they work to provide maximum benefit.

For many users switching from email to social networks, this seems to be particularly challenging, as the benefits are mostly collective rather than personal. The essential difference

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is transparency, and that can produce fear as often as motivation. However, transparency can increase a team's agility, and by extension, their responsiveness to the market.

In other words, the challenge is often not a technology challenge but a human behavioral challenge. This same story could be told for a user who makes the switch from using their desktop for file storage to using SharePoint Team sites or Microsoft Teams. Perhaps the word transparency does not fit your organization, and instead, the word visibility or shared work would serve better. The challenge remains the same: how do we educate and accelerate the change in our users?

It should be noted that there are things we can (and should) do by providing more flexibility in privacy and control to the user, but the importance of change management, education, training, and awareness cannot be understated and is not the primary focus of this document.

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3.2. Microsoft 365 Powered Intranets Provide More Benefits

Each of the identified benefits has been proven, based on industry experience, to impact the business significantly and deliver considerable value. These benefits, identified as having a high estimated impact, should be prioritized, and a plan should be put into place to track and realize them.

While no particular digital workplace area is inherently more important than another, Microsoft and its 3rd party ecosystem do provide stronger benefits in some categories than others. We have organized the benefits, their impact, and alignment with key digital workplace categories:

Access, Mobile & Responsive Design
25%

Ensure that no matter where you log in, whatever device or platform, the process will be seamless - positively impacting operating costs through ease of use and efficiency.

Pages, News & Site Management
15%

These benefits ensure that your content experience and execution in Microsoft 365 does not put your UX and UI efforts to waste on your journey to a more informed and invested workforce.

Personalization
13%

UI and UX are crucial aspects of every solution, and your digital workplace is no different. These benefits help retention efforts through increased employee engagement.

Analytics and Reporting
11%

In order to move forward we must learn from the past. Having strong digital workplace analytics and reporting keeps your company on top of potential improvements needed with detailed information as your guide.

Development
11%

Developing on Microsoft 365 is no only cost-effective but has significant impacts on employee performance. These benefits provide further insights into how and why.

Integration
9%

Every application you need to run your digital workplace, all seamlessly integrated. These benefits outline the advantages a connected ecosystem provides.

Search
9%

A lot happens in a work day, and when employees can't find what they are looking for, the will rely on search over navigation. These benefits compliment the navigation and can guarantee all roads to the information they seek are effortless.

Content Management
7%

Whether you have multiple company divisions or only departmental information to manage, these benefits help you get to and manage the information you need effectively and efficiently.

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3.2.1. Access, Mobile & Responsive Design Benefits

What follows are the key benefits of SharePoint and Microsoft 365 Intranet's as they relate to access, mobile and responsive design.

Reduce the costs in making your Intranet responsive by design by leveraging the out of the box experience in SharePoint Online or when extending it via best practices, samples and code that is readily available.

Help **Firstline workers save 140 minutes per week** from improved tools and information. (Based on Forrester TEI reports).

With easy on-the-go access, the **SharePoint mobile app helps keep your work moving forward** by providing quick access to your team sites, organization portals and resources, and the people you work with. You can see site activities, get quick access to recent and popular files, and view and arrange lists on your team sites.

Save highly mobile workers and employees 24 minutes a day accessing systems and information.

PowerApps can dramatically accelerate how business mobile and tablet apps are built, reducing **time to build the solution from weeks or months to minutes** and empowering a new category of app creators.

Use the Delve mobile app to **see what you and your colleagues are working on across Microsoft 365**. Based on who you work with and how you work together, Delve suggests documents that are relevant to you.

Out of the office doesn't mean you have to be out of touch. **Use the Yammer mobile app to stay on top of conversations**, post updates, and collaborate with your team no matter where in the world you are.

Instantly access all your team's content from a single place where messages, files, people, and tools live together. The Microsoft Teams mobile app gives you access to a modern chat-centred workspace in Microsoft 365. This can be leveraged for Intranet content authors or a great place to discuss and share Intranet content.

Keeping corporate data secure on mobile devices is a top priority. Microsoft 365 helps you meet this challenge by providing built-in security plus a set of tools to manage access to data across phones and tablets.

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Employees can securely and responsibly access the Microsoft 365 Intranet anywhere, at anytime and on any device without a VPN. With built in and integrated multi-factor authentication that supports rapid login from apps, biometric sensors, Windows Hello and more.

Setting up and managing your policies is simple. You can apply device-specific security policies to ensure that data is synced and accessible only on authorized phones and tablets. What's more Microsoft supports app management policies and the protection of your data across enterprise apps.

Reduce the risk of data leaks and increase control. When you need to wipe Microsoft 365 data from selected devices, you can do it remotely and safely.

Reduce major security risks such as **reducing the likelihood of a major data breach by 1% to 5%.** (Based on Forrester TEI reports).

Being able to interact with the Intranet from any mobile device or tablet is made possible through responsive design and a great set of mobile app experiences.

Some organizations may want a more streamlined experience or one that works for all users, even those not licensed in Microsoft 365. For these users and organizations, it is worth exploring Microsoft 365 integrated offerings that provide a richer mobile Intranet experience than what the SharePoint mobile app provides today.

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3.2.2. Personalization Benefits

What follows are the key benefits of SharePoint and Microsoft 365's powered personalization.

Simplify and improve employee experiences by presenting information (top navigation links, news, quick links and more) relevant to particular groups or users within the organization. Out of the box SharePoint has audience targeting for content, roll ups, and even things like the navigation experiences.

Developing richer personalization is made easier by leveraging SharePoint's audience capabilities, its deep permission control, rich AD integration and industry best practices for Microsoft 365 development.
This offering is particularly compelling when coupled with AD groups based on dynamic membership.

Many vendors have additional personalization features that enable more user control and subscription-like models. What's more, some even have invested further in ensuring the data you target (such as AD attributes) is always up to date and reliable.

Enable a new level of organization, personalization, and access to all of the apps and services that matter to them from anywhere in your digital workplace by leveraging the Microsoft 365 app launcher and the Microsoft App Bar.

The App Launcher, App Bar, SharePoint Home, Office Home and many other Microsoft 365 experiences provide quick access to personalized and dynamic navigation to get back to recent documents, sites, and work you have been performing.

Keep staff connected with real-time updates on system alerts, personal reminders, and communications (new emails, group likes, etc.) from anywhere in your digital workplace by leveraging the Microsoft 365 notification bell/pane.

Aggregate and keep employees informed on activities that are important for them to know by accelerated custom development and Microsoft 365's integration capabilities (Power Automate & Azure Logic Apps).

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3.2.3. Pages, News & Site Management Benefits

What follows are the key benefits SharePoint and Microsoft 365 powered pages, news and site management can provide.

Enable rich page authoring experiences that provide content contributors re-usable and configurable controls, components, sections, and design/templating support.

Many vendors significantly improve the experience with even more management and re-usable templates or more components/widgets.

Enforce quality is maintained with a highly configurable set of publishing and approval features via both built-in publishing and Power Automate capabilities.

Ensure security and compliance by leveraging SharePoint's comprehensive permission management and Microsoft 365's information protection and lifecycle management capabilities.

Simplify site creation and consistency in design using site templates, site designs, headers, footers, and site branding/theming and more.

Provide improved self-service site creation and site lifecycle by building on the SharePoint platform using industry best practices while also providing options and approaches for extending this model to tailor it your organization's needs.

Vendors can improve this experience with even more powerful design capabilities that make it easier to configure templated branded sites and to update/leverage more accessible site templates that might require less technical skills. They can also often improve the request, provisioning, and lifecycle process around sites.

Improve user engagement and participation with liking, commenting, easy sharing, and other key capabilities in pages, news, and sites. This can be further enriched with pre-built integration between Yammer, Microsoft Teams, and Microsoft Stream.

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3.2.4. Content Management Benefits

What follows are the key benefits of SharePoint and Microsoft 365 powered content management.

Help users filter through incredible amounts of information available to them and manage information growth with rich and comprehensive metadata capabilities in SharePoint Online that allow content to be tagged, enforce metadata integrity and validation.

Ensure compliance and improve corporate business processes that relate to the management of information by leveraging automated workflows, content lifecycle management, and compliance capabilities built into SharePoint Online and Microsoft 365.

Harness the knowledge and expertise of your organization, empowering everyone to make more informed decisions and take action faster with Project Cortex and Microsoft 365 as it applies advanced artificial intelligence (AI) to empower people with knowledge and expertise in the apps you use every day. Connect content in Microsoft 365 and external content to manage your information and streamline processes with advanced security, compliance and automated workflow.

Ease and speed of sharing with a consistent and intuitive sharing experience (in Windows 10, SharePoint, Microsoft Teams, Outlook and more), easy external sharing (guest/anonymous or named), link sharing (internal and external), reporting on what has been shared, enforcement of a password for access if desired, expiration of access, request files, and more all add to save individual's time getting hold of information and sharing information.

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3.2.5. Search Benefits

What follows are the key benefits of SharePoint and Microsoft 365 search.

Help users find content faster based on their profile, the sites, and files they recently viewed or searched for, and based on popular searches within your organization by leveraging SharePoint Online and Microsoft 365's industry-leading search capabilities.

Provide predictive and intelligent search experiences to users across the applications they already work in such as the Office suite, Microsoft Teams, SharePoint, Edge Browsers, Bing Searches and even Windows devices. Bringing the Intranet's search to where users are as one more way Microsoft 365 enables you to bring the Intranet to the user.

Increase discoverability and engagement of your enterprise content and data across systems by bringing them into the Microsoft Graph and Microsoft Search. The connected content can also direct users to the best experience or application while providing unified search.

Reduce silos and places users have to search when an organization has a considerable SharePoint Server footprint by leveraging SharePoint's hybrid and federated search capabilities.

Assist users performing searches by providing recommendations, suggestions, and predictive assistance by leveraging Microsoft 365's industry-leading search personalization.

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3.2.6. Integration Benefits

What follows are the key benefits from SharePoint and Microsoft 365 powered integration.

Provide more ways to surface, connect, and provide a unified employee experience by leveraging Microsoft 365 and SharePoint which natively supports integration with Outlook, Teams, Yammer, Microsoft Stream, Planner, Project Online, Dynamics Online, Office Online and much more.

Reduce employee application switching costs by ~15-25 minutes per day providing time back to drive more value and impact. (Based on Forrester TEI reports).

Connect and amplify the impact of leadership messaging, corporate communication and your existing Yammer social network by leveraging Microsoft 365 and SharePoint's built-in integration with Yammer.

Connect Intranet news and key pages/experiences in Microsoft Teams with built-in integration to bring the Intranet (and all of its value) to users where they are and increase engagement, reach, and productivity.

Simplify collaboration, adapt to continuous organization changes, simplify day-to-day tasks to increase productivity, and maximize time and resources with over a hundred popular services and systems in Power Automate.

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3.2.7. Analytics & Reporting Benefits Summary

What follows are the key benefits from SharePoint, MyAnalytics, Workplace Analytics, and Microsoft 365 powered analytics.

Enable employees to more rapidly view recent or important site activity, important document activity or the usage of their important documents by leveraging Microsoft 365's built in collaboration analytics.

Improve insight, understanding and employee engagement on key pages, sites, news articles, and documents. Microsoft 365 provides site and hub site analytics that help simplify the reporting process and strengthen a sense of ownership by giving content publishers direct feedback on performance.

Provide users insight into two of the most important factors in personal productivity: how they spend their time and who they send it with leveraging Microsoft 365 MyAnalytics. Details about time spent in meetings, who they are losing touch with or working most with (including reading rates, response times, and more), email behaviour, focus hours, and after hours work all let employees know exactly where their time is going.

Discover opportunities to optimize business processes, identify patterns that lead to success, measure the impact on business outcomes through a continuous cycle of discovery and change, identify and promote the right skills and behaviours to meet organizational goals, develop careers, and grow new leaders by leveraging extended insights with Microsoft Workplace Analytics going beyond traditional Intranet analytics and reporting.

Make it easier to change habits and harmonize work and life with personalized insights, and recommended actions for individuals, managers and business leaders with Microsoft Workplace Insights (across Microsoft Teams, MyAnalytics, Workplace Analytics, Productivity Scoring and more.

Enhanced analytics and reporting with an extensive ecosystem of partners who provide unified reporting across other key enterprise systems along with your Intranet and Microsoft 365, provide improved depth or detail in reporting, or recommended actions for content authors and Intranet leaders.

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3.2.8. Development Benefits

What follows are the key development benefits from SharePoint, Microsoft 365, and Microsoft Power Platform.

Vendor costs can be displaced or reduced based on the use of existing Microsoft 365 functionality, new innovation in the suite, Power Platform or Microsoft 365 developed solutions.

The average cost to develop solutions is 70% less and significantly faster when leveraging existing frameworks and pre-existing integrations with Power Automate, Power Apps & Power BI. (Based on Forrester TEI reports).

Processes can be automated, improved and digitally enabled easily with the Microsoft Power Platform, Microsoft 365, Microsoft Lists, SharePoint, Microsoft Teams, Planner, and more.

Streamlined business processes reduce the time it takes to develop a new product by 14.18 days and saves 12,500 hours per year in distribution activities. (Based on Forrester TEI reports).

Save significant time when building on the Microsoft 365 platform and when using the Microsoft Power Platform. Application testing for 50% of the apps in a portfolio are reduced by 75% (Based on Forrester TEI reports).

Leveraging reports, solutions and experiences in Power BI have been proven to improve time-to-decision for decision makers by 15.6% (Based on Forrester TEI reports).

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4. BEST PRACTICES FOR BUILDING YOUR MICROSOFT 365 INTRANET AND DIGITAL WORKPLACE

Microsoft 365 is easily malleable to your business requirements. While that presents a wave of opportunities, you will need help navigating the many options ahead. For that reason, we have included a long list of best practices to consider across all aspects of your intranet and digital workplace.

4.1. Design: Intranet & Digital Workplace Best Practices

There is an incredible amount of effort that goes into designing world-class and highly successful Digital Workplaces. While it is crucial to perform interviews and planning workshops to understand what is working, what pain points exist, and define user stories or requirements, it is just as important to map and identify Microsoft 365 capabilities/solutions that can be used to meet those needs.
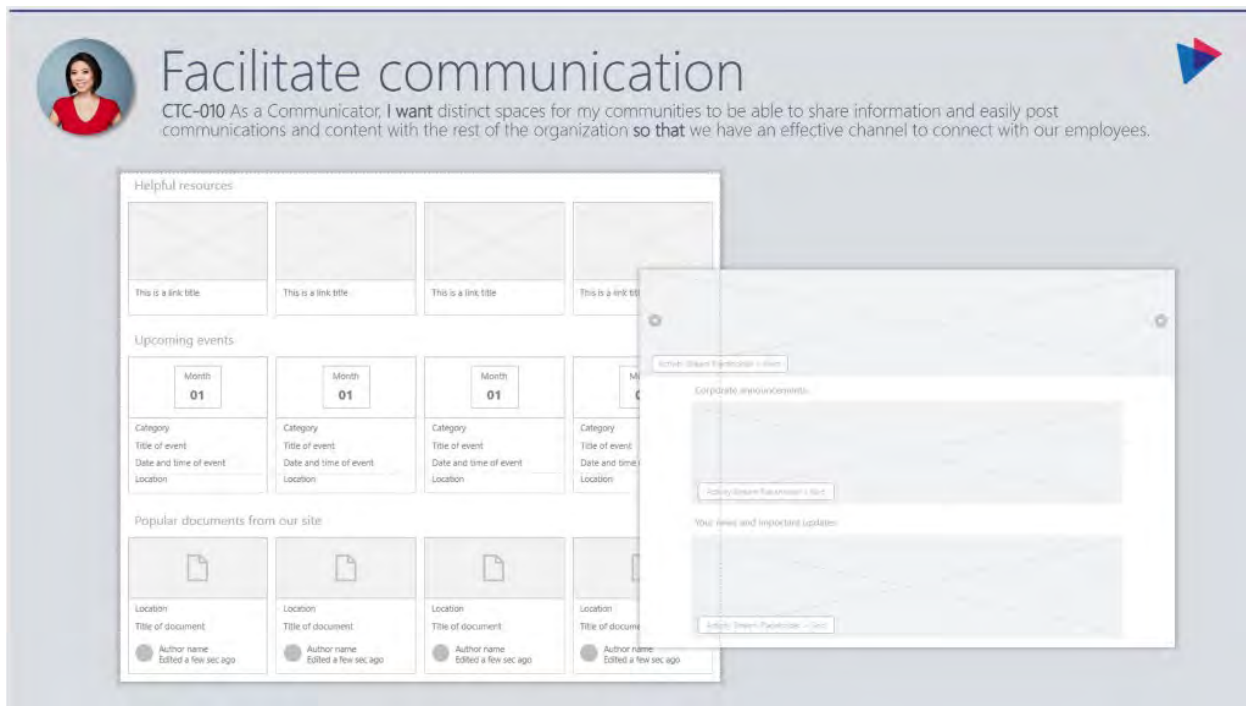
This requires mapping user stories to potential experiences that complement or support meeting them. Then further outlined into solution blueprints or specifications, which can be

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implemented by a skilled Intranet or Digital Workplace team.

Keep in mind the approach, breadth, and depth of your design will depend on where you are in your Intranet and Microsoft 365 journey.
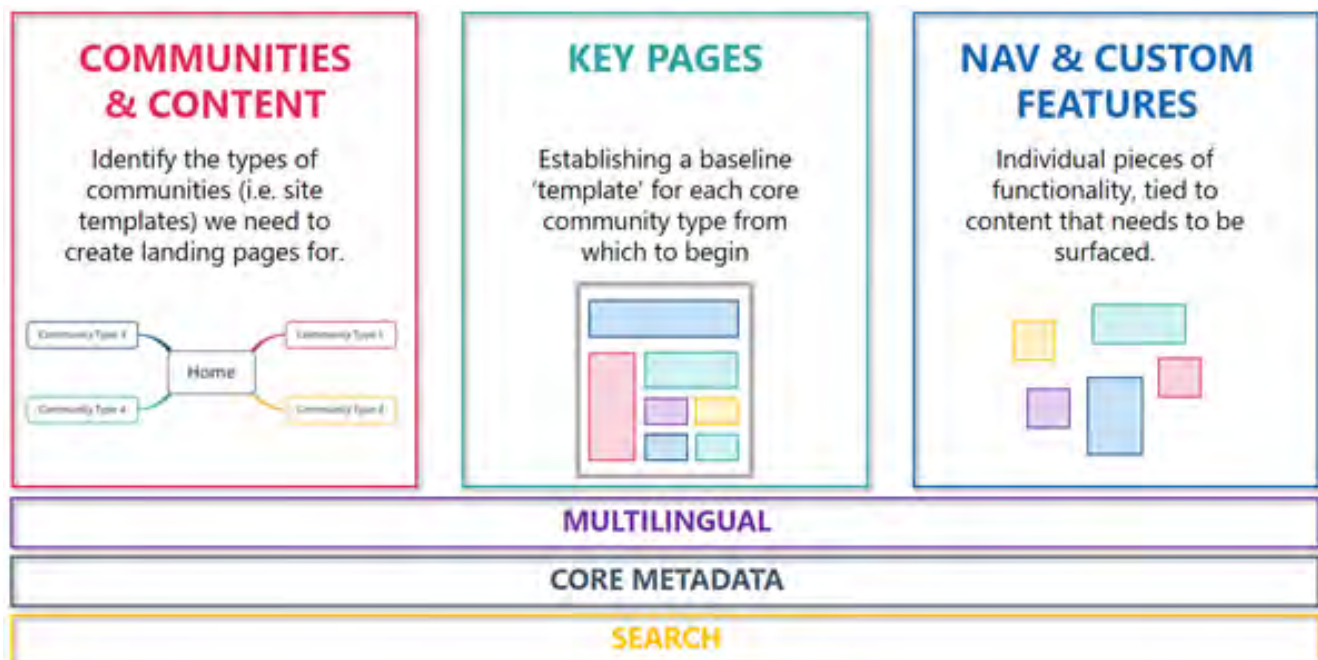
For example, think of how key workshops and planning activities relate to one another and build upon one another. It's necessary but not sufficient to run a few design/planning sessions

and begin implementing a Microsoft 365 Intranet. If possible, spending real-time planning can pay significant dividends in improved experiences, rollout, adoption, and better business outcomes.

4.1.1. Content Strategy & Continual Content Planning

You will see that without investing in content continuously is a significant trailing drop in the Intranet's active usage or adoption. When users do not have the flexibility, relevancy, dynamism, or engaging content in an intranet, they slowly start to spin-off to their alternative communities.

It is essential to understand how to approach content, keep content fresh, and enable, enrich, and amplify great content across the organization. In many ways, this is more crucial than the platform itself. That said, the platform can significantly support more effective content creation, dissemination, and consumption.

Platform

What people see (and tend to blame) is the platform. While the user experience layer of an intranet is important to get right, it will remain fundamentally a "shell" unless populated with content. The platform is ultimately there to enable content creation and consumption.
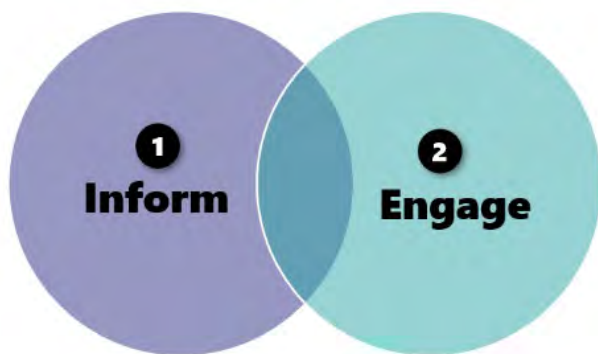
Content

Over the long term, what truly drives engagement and overall adoption of an intranet, is content that is dynamic, relevant and helpful in some way.

Forcing users to the intranet can have a small impact, but it will never replace a user's innate desire or drive to visit the intranet themselves because is it filling a core need.

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Microsoft 365, as a platform, provides great content creation experiences and gives them to all employees, even down to the team or individual level. This means that, with the right strategy and proper implementation, a communications team can shift from the legacy approach of being editors to a modern approach of being enablers, amplifiers, and enrichers of communication throughout the entirety of the business.

When thinking about content, it can be helpful to think about the content's purpose. In some cases, its purpose falls neatly within the scope of "to inform" or "to engage," but it can serve both purposes in other cases. Keep in mind that this content stretches from traditional corporate communications-led content to a project team's lessons learned.

1. Content that **provides information**
   - Policies & Procedures
   - Benefits information
2. Content that **drives communication & engagement**
   - News & Events
   - Employee Success Stories
   - Marketplace

By thinking of content in this way, it may help your Intranet team(s) determine where to prioritize their efforts and how they can best support an effective content strategy.

Populating and creating content for the Intranet is not a project that ends at launch. It is an ongoing priority that provides:

- A steady "drumbeat" of the voice of leadership
- A way to stay up to date on what the company is doing
- A reflection of corporate culture and ethos
- A means for employees to be more efficient and productive (e.g., templates)

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- A vehicle for end users to feel included in the organization by seeing themselves reflected in it and giving them a voice
- A means for employees to gain useful insight into the minds of their colleagues, and feel more connected to one another

Consider the types of content we create and how we intend to use that content. Are you thinking about a wide variety of content and not just leaning into a few types? As a quick summary, here are a few common content elements that need to be continually improved and added to an Intranet:

- Pages (e.g., News, Events, etc.)
- Documents
- Links
- People and Employee Profiles
- Media (e.g., Videos, Images)
- Reports and Dashboards
- Forms
- Social Media (e.g., Twitter)
- Conversations (e.g., Yammer)

Considerations for Migrating Content

Lastly, if you are looking at migrating content from multiple sources or Intranets to your new Microsoft 365 one, it is also essential to plan this migration step by step.

While not a comprehensive listing, here is a quick summary of the steps involved in a typical content migration for the Intranet.

1. Assemble a team and identify roles
2. Complete an inventory
3. Perform an assessment & prioritize your effort
4. Execute migration & track your progress
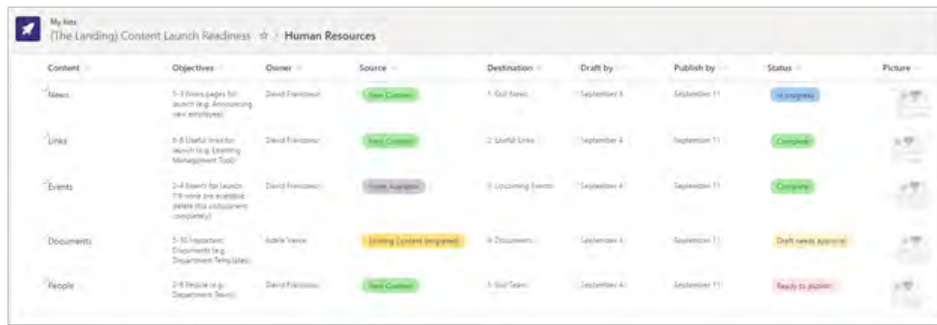5. Create new content
6. Finalize landing pages
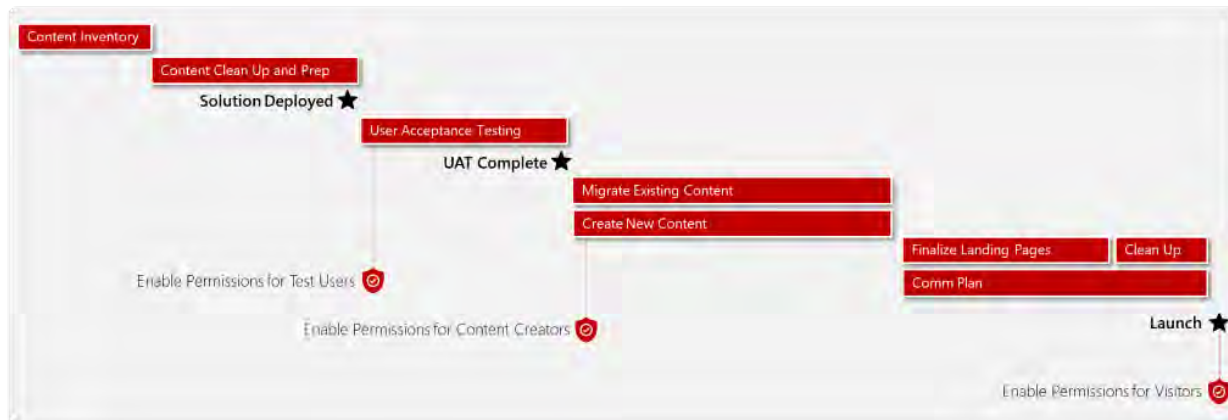
Another way to think about this is to explore what migrating content decisions need to be made. Will you be leaving the content? Moving it only? Updating it as well? Re-writing it?

This preparation should include evaluating and assigning content.

Aligning the content to the wireframes and templates you have already planned out. Then once mapped out, you can begin executing the content migration work.

When conducting the migration work you can do this Manually, with Microsoft Tooling (depending on where you are coming from), or via 3rd party tooling.

1 Manual
- Content is moved manually via uploading
- Free
- Manual effort may not be feasible for a large volume of files

2 Microsoft Tools
- Content is moved via the SharePoint Migration Tool (SPMT)
- Free
- Limited feature set
- Only supports certain scenarios* (File Shares, SP2010, SP2013, SP2016)

As of v3.4.119.7 (Aug 2020)

3 Third Party Tools
- Content is moved via a tool (e.g. ShareGate, AvePoint, Quest)
- Powerful feature set (e.g. Version history)
- More costly, but the cost can easily be justified in large, more complex migrations

⚠ **NOTE**: *If you want to better understand how to plan for and migrate from SharePoint Server to Microsoft 365 we have an extensive whitepaper on the subject "The Definitive Guide To Migrating To SharePoint Online From File Shares And/Or SharePoint Server".*

Consider establishing content authoring guidelines or resources that educate authors on proposed authoring standards with helpful tips to ensure quality and consistency of content.

This might contain topics such as:

- Intranet Content vs. Collaborative (Team) Content
- When to use what medium
- Web writing best practices
- Appropriate use of images
- Where to find corporate assets (Logos, Icons, etc.)
- Tips and Tricks
- Who to reach out to for help

Optimally this would live in your digital center of excellence. Speaking of a digital center of excellence, be sure to establish a community to support these content authors not just in the migration but continuously after it - as continual content planning is key.
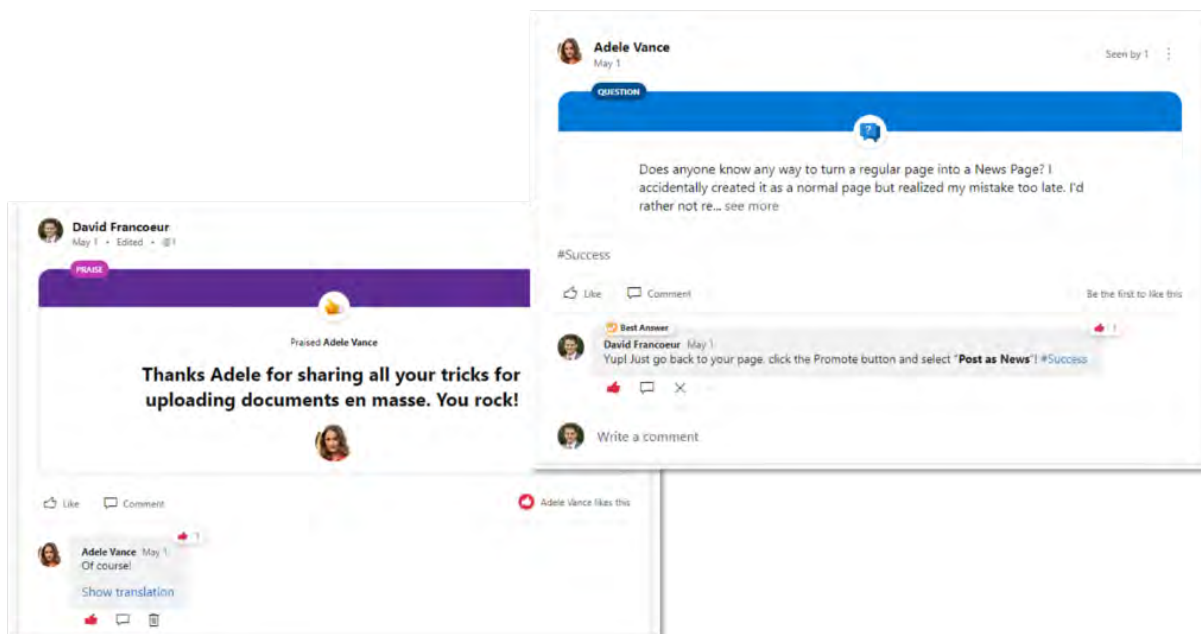
Some final tips and a reminder to take your time and plan your approach to content early in the process:

• Prioritize your effort within spaces

- Not all content may be needed on the Intranet from Day 1

• Garbage in, garbage out

- While it can be tempting to move everything as is, take the opportunity to address problems with the content. (e.g., File Name clean up, Out of date content, etc.)

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• Don't forget net new content

- The new platform likely introduces new opportunities for content that didn't previously exist

• If possible, share the effort among people

- More hands make for lighter work
- Good training opportunity for the platform

• Don't forget training and adoption

- It is preferable to migrate and rollout content alongside a training an adoption campaign

4.1.2. Access & Sign In Experiences

There are some significant benefits to leveraging Microsoft 365 for your Intranet when it comes to authentication and identity. One of the biggest is that authentication can happen securely from anywhere, at any time, and on any device.

For many Intranets, just being able to access the Intranet from home, remote offices, on the road, and customer sites can be a significant benefit. This is enabled with no additional effort.

You can customize the sign-on experience so that when users are prompted for access, you have an opportunity to share key messages and continue to reinforce your brand.
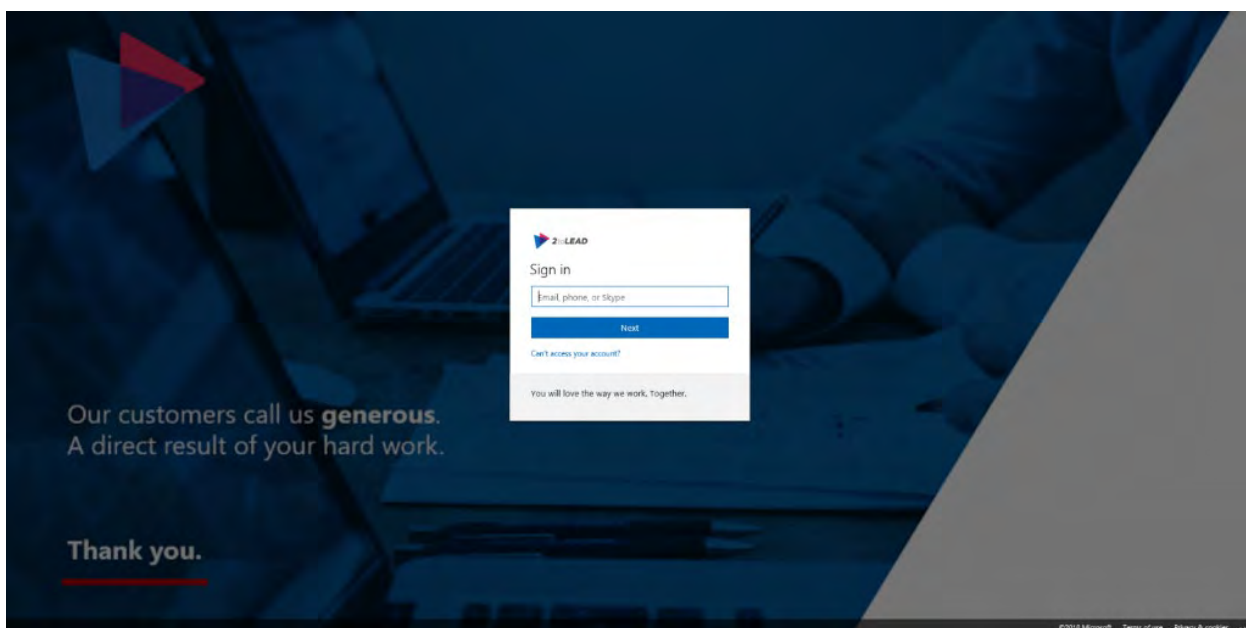
When you spend so much time and energy on your Intranet branding, it would be a major missed opportunity to neglect branding this experience. Not only will it improve your Intranet sign-in experience but all of the Microsoft 365 sign-in experiences - such as for OneDrive, Planner, Microsoft Stream, SharePoint, and Outlook Online.

4.1.3. Branding & Design

When planning effective branding and design in Microsoft 365, there are a few things we believe must be taken into account.

- **Don't Build It on Classic SharePoint!** Your Intranet and Microsoft 365 Digital Hub for your Digital Workplace should leverage the modern feature set and be designed around SharePoint Modern.
    - o Classic sites and underlying features are over eight years old. By not leveraging modern sites/pages/capabilities for your Intranet, you would be missing out on years of innovation and improvements.
    - o As of today, there remain *no significant reasons* for building on classic features. It is not recommended, and it is not a good investment decision.
    - o While some customers will have sites in classic from previous migrations or as a temporary state, it is important to note that investing in linking or integrating these into the Intranet is our recommended limit for effective investment related to your Intranet.

- **Leverage What Is Available Out of The Box!** It is important to leverage themes, header designs, organizational logo and home icons, and more. You can do a lot of design tweaking to meet your brand with these out-of-the-box configuration options Microsoft provides.
    - o The Microsoft 365 Look Book is an excellent resource for inspiration but is intended to showcase functionality. It can be a great place to start understanding how visually distinct two out-of-the-box sites can look with the use of section backgrounds, theme colors, and web parts.
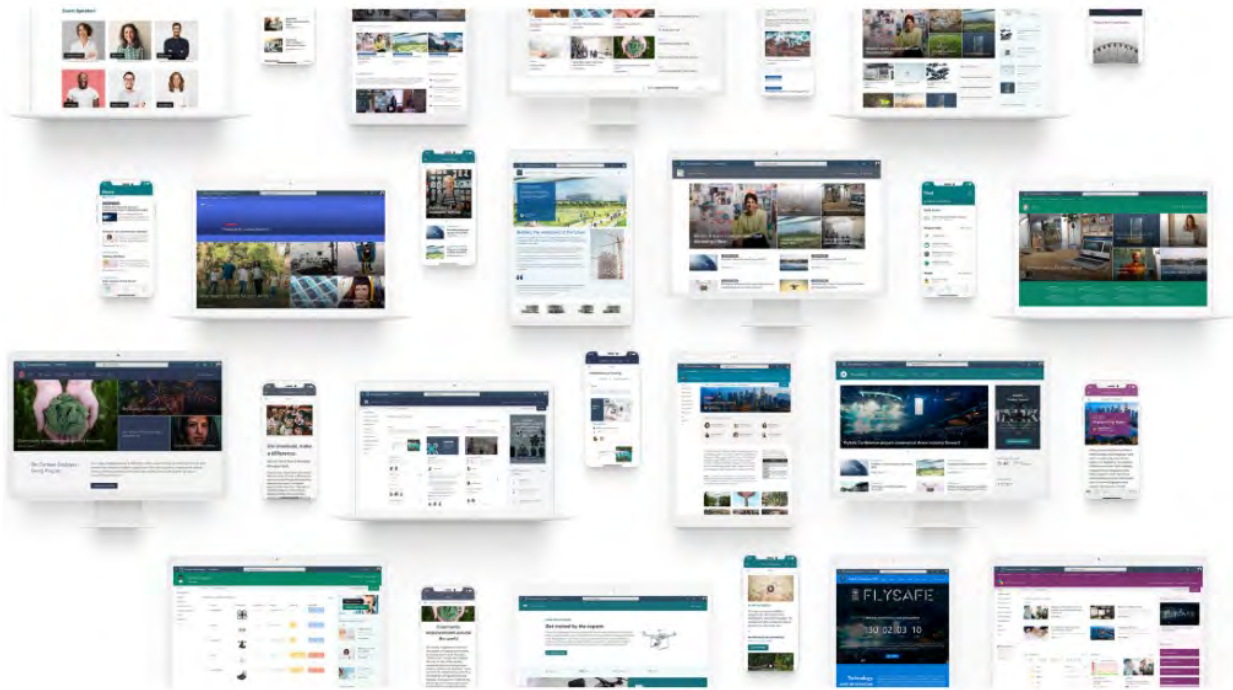
- **Extend & Compliment with Customizations!** When you do need that specific look and feel or style that isn't available out of the box, ensure you only add that visual style or experience in a targeted way. Consider if it can be a header change across all sites/spaces or if it could be represented in a web part on the page - such as how many organizations create their news roll-up/filtering control(s).
  - Example 1: Global Top Navigation that blends local navigation in the first node in a mega menu design along with global navigation and specialized experiences. Notice how it doesn't change the OOTB page content below it and only affects the header and footer in this instance.

  o
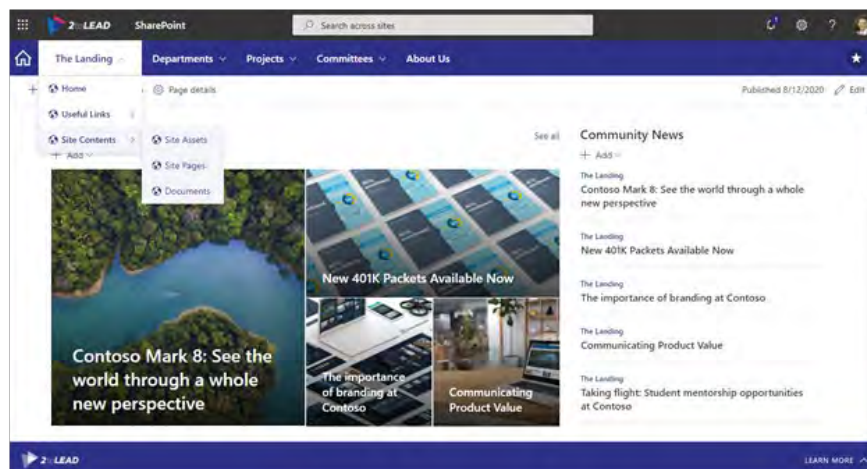
- o Example 2: News/Activity Feed Rollup that combines events, news, spotlights, more control on style of categories, and additional enhancements that the out-of-the-box news control doesn't provide.
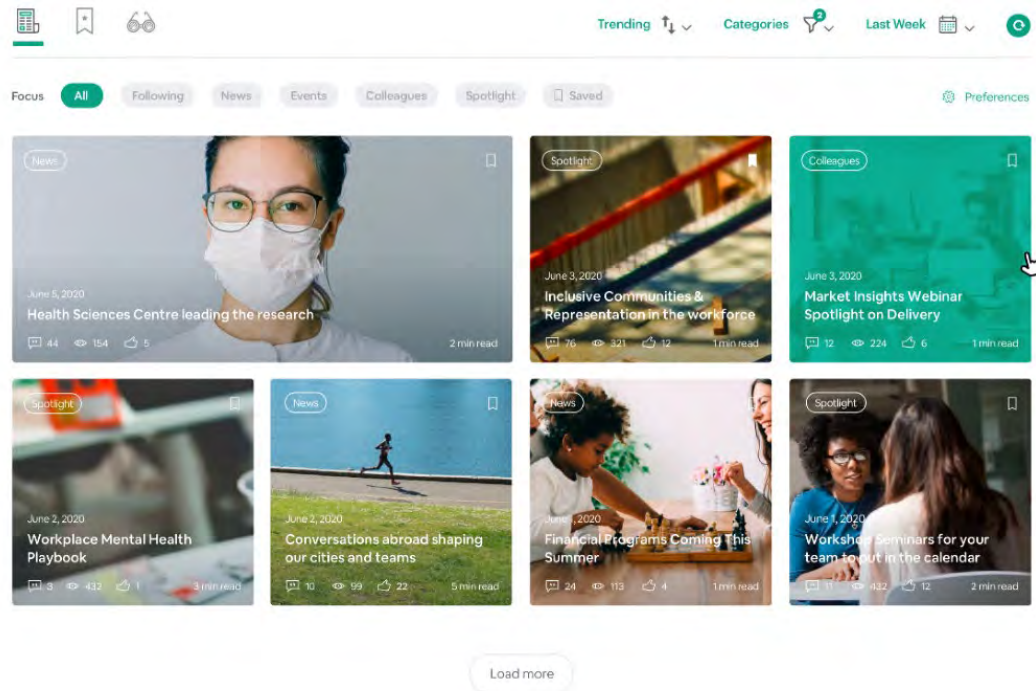
Headers, Themes & The Microsoft App Bar

Beyond page-level changes to the layout, look, and feel, you can also set organizational hub site, or site level branding.

The first thing you can (and should) consider is selecting the right header for your needs.

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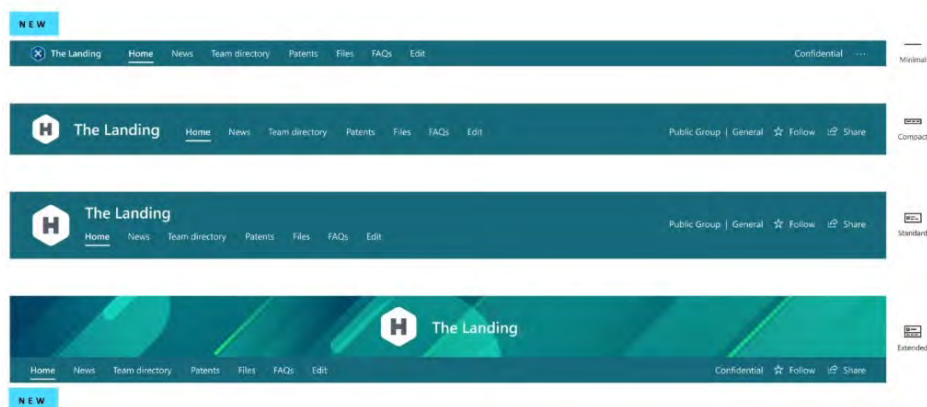
There are four core styles from minimal to extended in terms of the space the header takes up. These can then be further configured to determine if you want to show the site title (which changes based on where you are), have your own logo image, and how it should work when condensed versus fully visible.
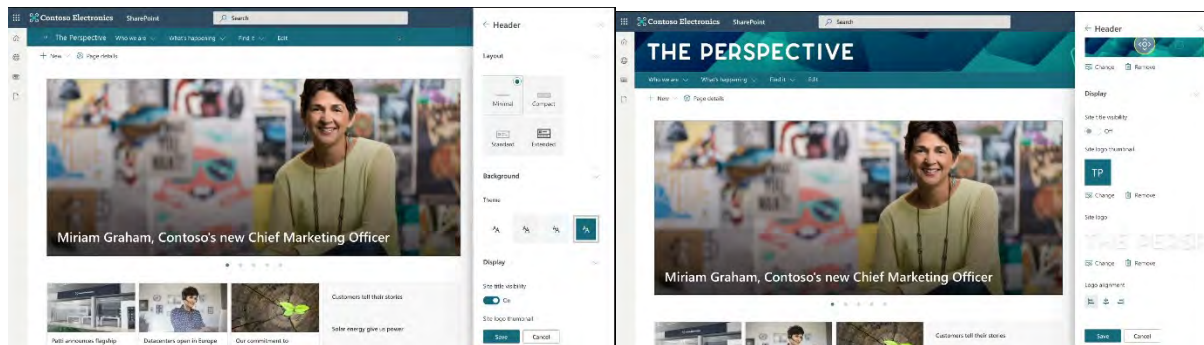
This header choice isn't just limited to thinking about the header below the "suite bar" (that bar at the top of Microsoft 365). Don't forget you can modify the suite bar to reflect your logo and branding. It has also been announced that it will be possible to modify the Microsoft App Bar's "home" icon if you want as well. Here are four variations to help show what you can do to adjust the suite logo work and the left nav (Microsoft App Bar).

- Organizational logo with "Home" icon.
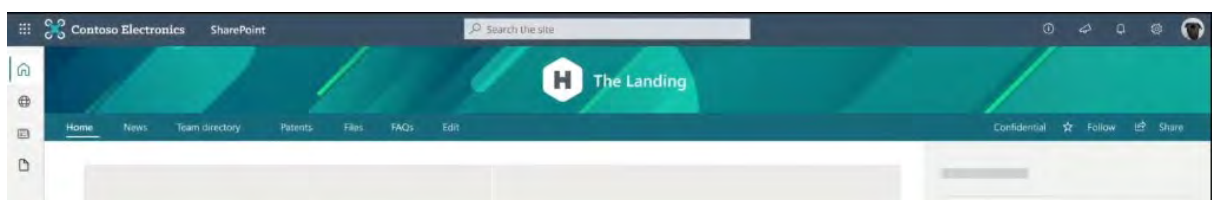
- Organizational logo with unique "Home" icon.
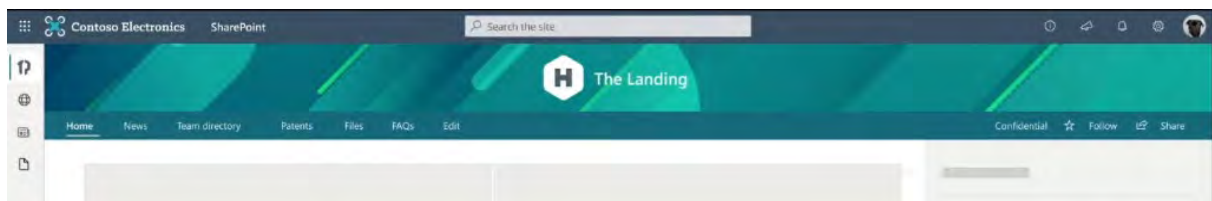
- Organization logo and icon.
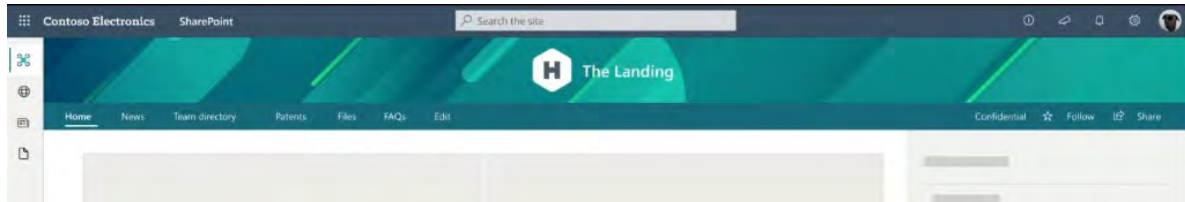
- Organization logo and Home site icon.
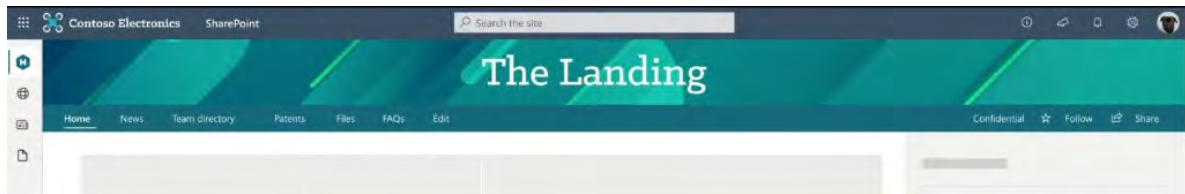
While a footer exists today in Microsoft 365, it is quite simplistic, and it isn't "sticky," so it is easy to miss. It also doesn't allow for image-based links such as social media icons, and it has minimal layout options. This is a relatively low-risk and straightforward customization, and we do encourage considering at this time building your footer for a better-branded experience.

To get started consider beginning from this PnP baseline: https://github.com/pnp/sp-starter-kit/blob/master/documentation/components/ext-portal-footer.md

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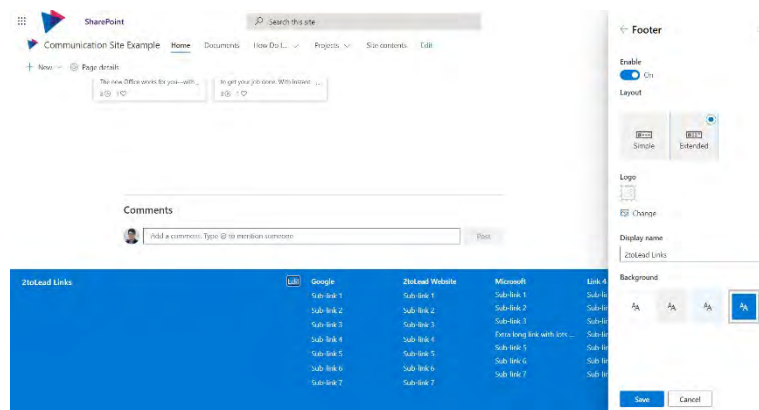
4.2. Search: Intelligent & Available Where Users Work

Search matters. Search is an integral part of any Intranet, Employee Portal, or Digital Workplace. In many cases, the search experiences are more robust when you build your Intranet with Microsoft 365. With the application suite, you can access results-driven from user behavior across Microsoft Teams, Outlook, SharePoint, and OneDrive paired with machine learning assisted results and the latest discovery and integrated search options available.

The Microsoft Graph powers Microsoft Search as it gleans insight from the people, sites, and documents you work with and ranks search results relevant to your needs. You will still see all the results that satisfy your query, but personalized search will prioritize the most likely outcomes to achieve your objective.

What users want from search has evolved over the years, and user expectations have grown dramatically in that time. Today, we frequently hear the following requirements:

☑ We want searching at work to be **as easy as searching the web**.

☑ We want results that are **relevant** and **personalized**.

☑ We want **answers** to our questions, not just more links.

☑ We want to be able to search across content in **other systems**.

Each of these needs is not only met by Microsoft Search but can be further tailored and optimized.

While many of the traditional search patterns haven't changed, what has changed is how these behaviors take shape in the system.

SEARCH	**FIND**	**DISCOVER**
"I know what I'm searching for and how to find it."	"I know what I'm searching for, but I don't know how to find it."	"I don't know what I'm searching for."
Search query and apply refiners, if needed.	Browse through navigation structure – guided by context.	Feeling that it should (or likely) exists already, so I want search to guide me.

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One example of this change is less reliance on having to 'go to search' but having search appear contextually where the user is. This is where Microsoft Search comes in. A search that lights up across experiences where users already work and incorporates signals from those same place's users work - and others that you connect.

in Bing
in Office.com
in SharePoint
in Edge
in Windows

Microsoft Search 🔍

in PowerPoint
in Outlook
in OneDrive
in Stream
in Yammer
in Word
in Teams
in OneNote

4.2.1. Should We Use Microsoft Search Or SharePoint Classic Search?

We recommend that organizations leverage, invest and build search experiences and solutions with Microsoft Search today and do not invest in "SharePoint Classic Search." Core experiences can be created in Microsoft search, with some potential improvements over how they were handled in the past. This is the primary search experience for relevancy, monitoring, and more that your organization will invest against in the years ahead.

4.2.2. Core Microsoft Search Experiences

Easily accessed from a consistent suite bar across Microsoft 365. Performing a search brings you to the result pages that you can tailor based on your own organization's needs.
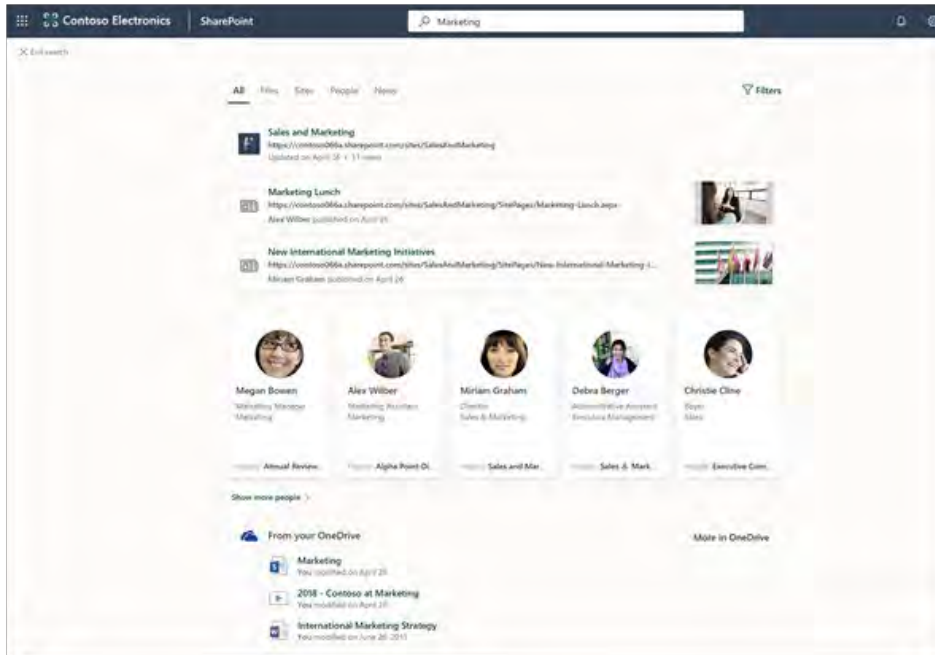
These experiences may differ from the context you are searching from. For example, searching from OneDrive automatically results in a focus on documents as the output since OneDrive is a document or files-centric part of your digital workplace.

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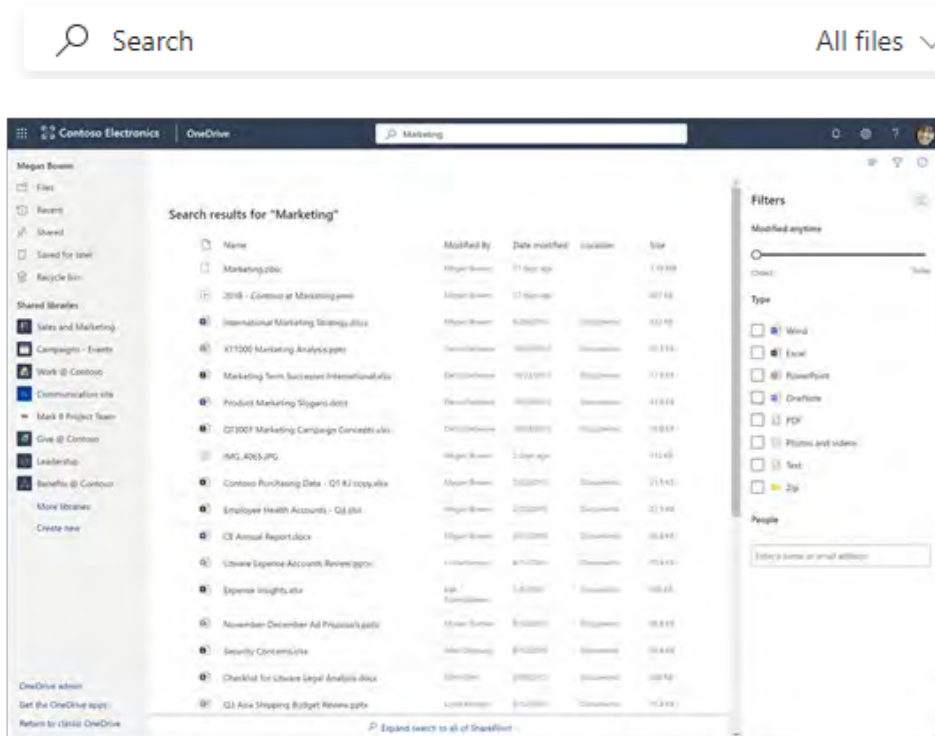
A search in Windows 10 can return those same Microsoft 365 results while combining them with internet search results or system apps, files, and settings.
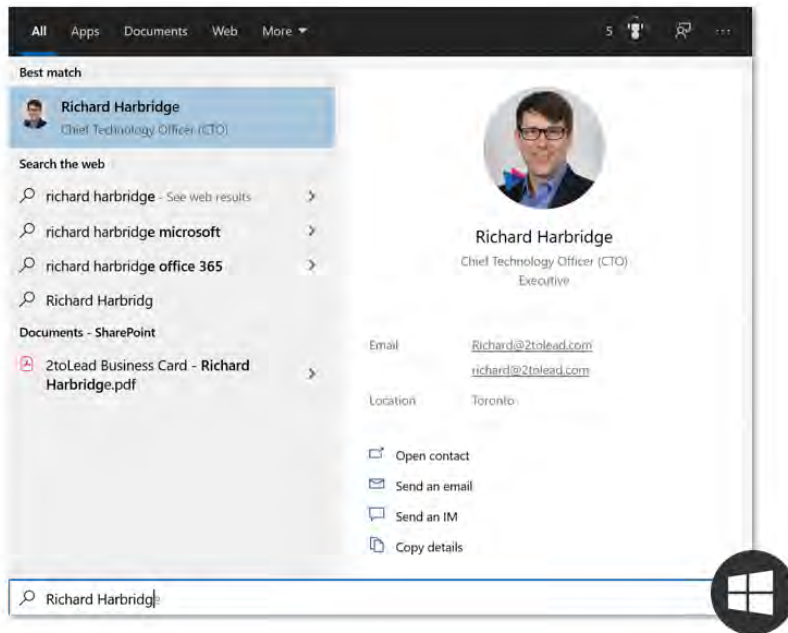
Lastly, each Office application has its way of providing results. It is easier to leverage assets from another presentation, in one you are currently working on inside of PowerPoint, regardless of where that file is stored in your Digital Workplace.

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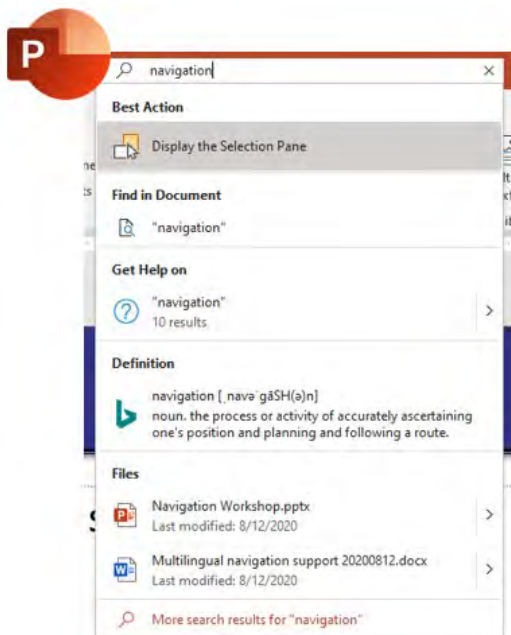
Many of these experiences support questions and answers, bookmarks, and other concepts that can help rationalize questions regardless of where they are asked – all while providing a growing number of ways to dig into these patterns and optimize them.
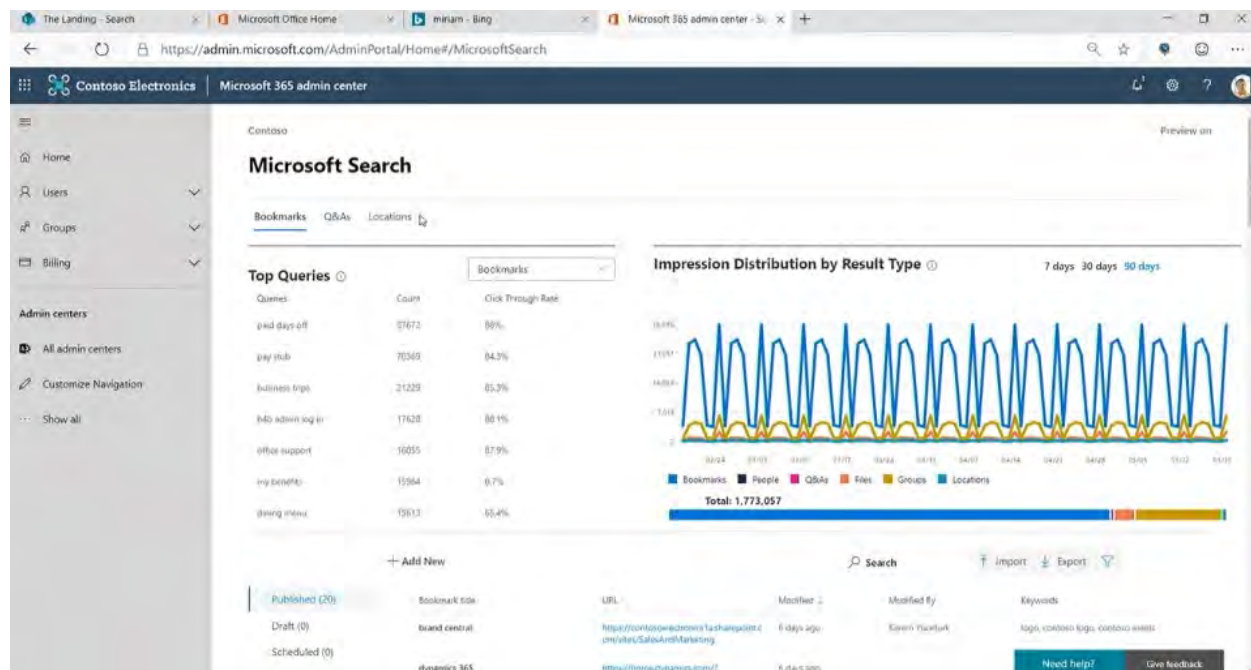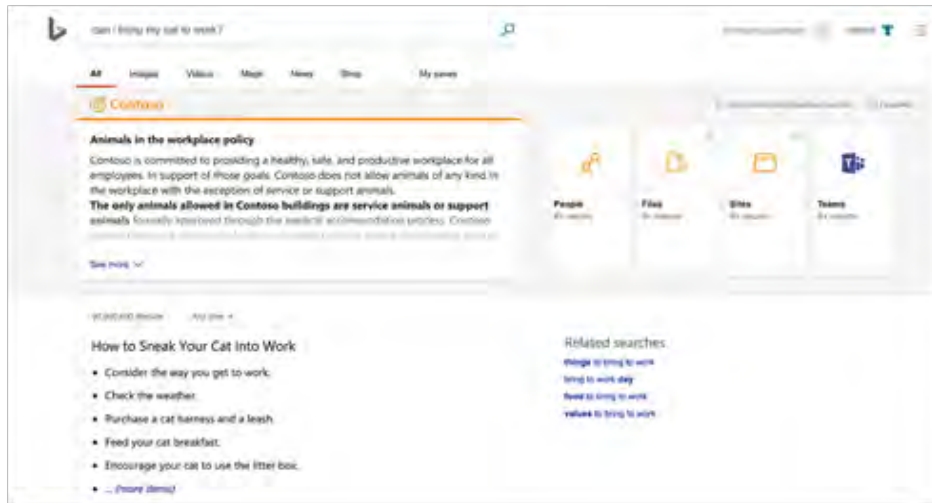
4.2.3. Optimizing Search For Your Digital Workplace

There are many ways you should optimize your search experiences for your Intranet or Microsoft 365 Digital Workplace.

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Configurable Search

For example, you might want to add verticals to surface results from your custom Search Connectors, such as a vertical for "Presentations" that filters to PowerPoint presentations and highlights key assets. It does this by limiting the search to specific areas like the Marketing Intranet site or targeted knowledge centers.

These verticals can enable searching specialized Intranet assets or help provide a set of 'pre-filtered' search results that can help improve how easy it is for users to search common patterns. They are also vital for scenarios when you integrate other systems/services and their data into Microsoft 365, such as the example below the organization's public website.
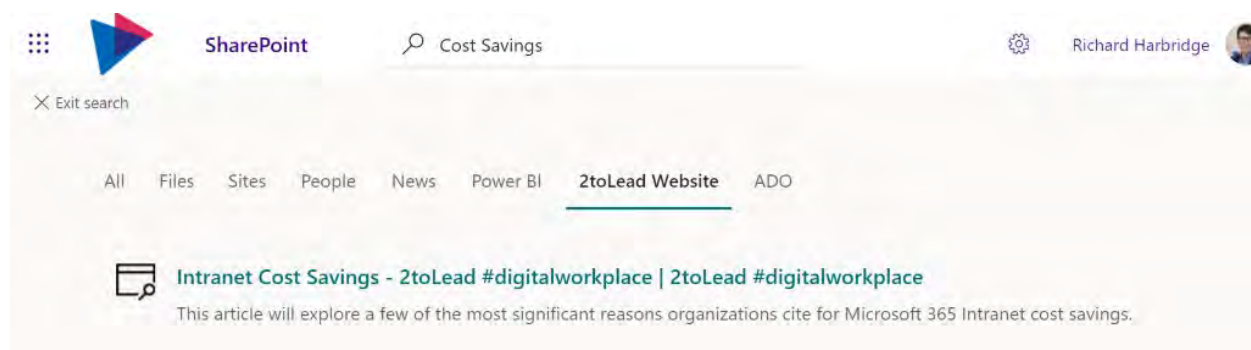
While identifying sites as hub sites (or home sites) has an automatic impact on how search is scoped - this can also be done manually. Manual intervention can be especially beneficial in scenarios like intranets where the default behavior of search becoming increasingly contextual is not always intuitive. A user often assumes that any search launched within an intranet will search across the entire intranet footprint. Using SharePoint PnP PowerShell, it is possible to run a simple command to define how search is scoped on a given site. To get started, install the latest version of SharePoint PnP and consult with help from this Microsoft Tech Community article.

Acronyms

Did you know that **2-3%** of search queries entered by employees are related to acronyms? Users often run into unfamiliar acronyms and abbreviations used by their organization or team. Certain terms specific to organizations or teams might be new to people who move from one team to another, work with internal partner teams, or are new to the organization. Organizations don't always have a single reference for their standard terminology. The lack of a single reference makes it hard to find definitions or expansions for these acronyms. Microsoft Search solves that problem with Acronyms.

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With minimal effort, your organization can define acronyms in a single place for all to see.

Bookmarks

Bookmarks are powerful aids that can improve a search result by providing 'best bets' or 'promoted results,' which can help ensure that a specific outcome is displayed to assist a user when you believe you know what they are looking for. In fact, these results can be highly interactive, even containing forms for common processes via Microsoft Power Apps.

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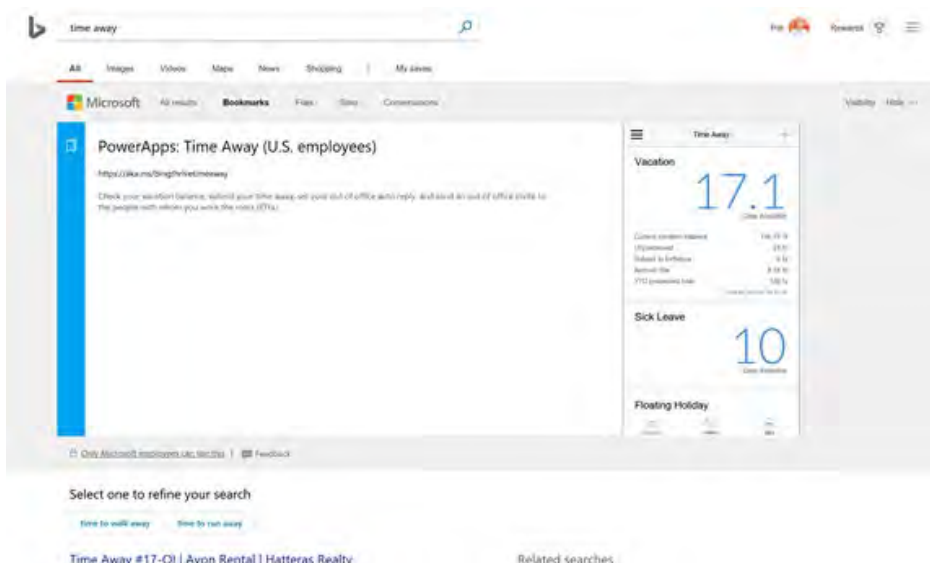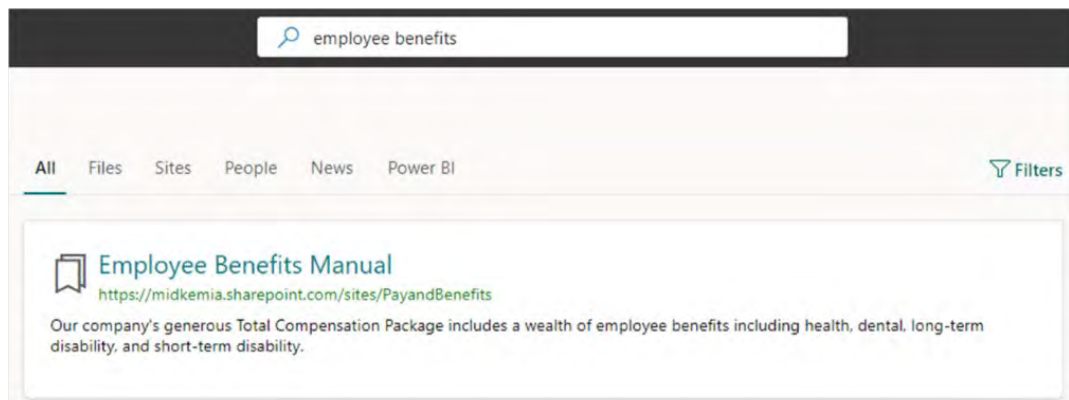
You can create a bookmark in just a few steps. Each bookmark includes a title, a URL, and a set of keywords that trigger it. You can also add categories to a bookmark that can be used to sort and filter in the admin portal. A bookmark can have several keywords, and bookmarks can share the same keyword, but reserved keywords can't be shared. When a bookmark is created or modified, the search index refreshes immediately, and the bookmark is available to users instantly.

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If your organization sets up Promoted Results in SharePoint, you can import the Promoted Results into Microsoft Search and make the imported content available to your users. This is an easy way to quickly populate search results as soon as you set up Microsoft Search and make it more effective for your users. We recommend using promoted results from SharePoint as a reference to understand how to name and create relevant search results.

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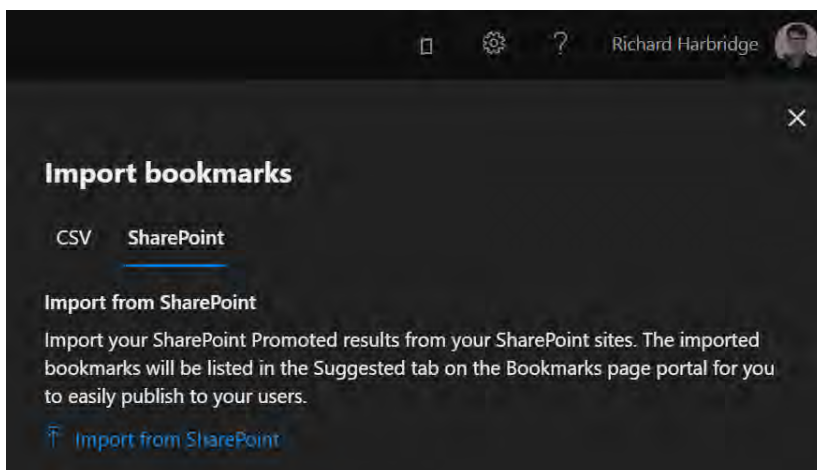
Microsoft Search now simplifies the process of creating and curating Bookmarks with Recommended Bookmarks. Bookmark recommendations are generated by reasoning across SharePoint sites in Microsoft 365 to suggest Bookmarks to the Microsoft Search administrator. This helps reduce the need to manually look across sites and information to determine the most valuable resources to curate and promote to Microsoft Search users. Of course, these bookmarks can be reviewed and modified by administrators if desired.

Questions & Answers

Creating a Q&A is similar to creating bookmarks. Q&As allow you to answer the user's questions instead of just providing a link to a webpage. You can also format the answer in rich text. If a bookmark and a Q&A share the same keyword, the bookmark result is shown first. Like bookmarks, the Q&A index is refreshed immediately after a Q&A is added or changed.

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Locations

You can enhance search by adding access to key corporate locations directly from search via "locations."
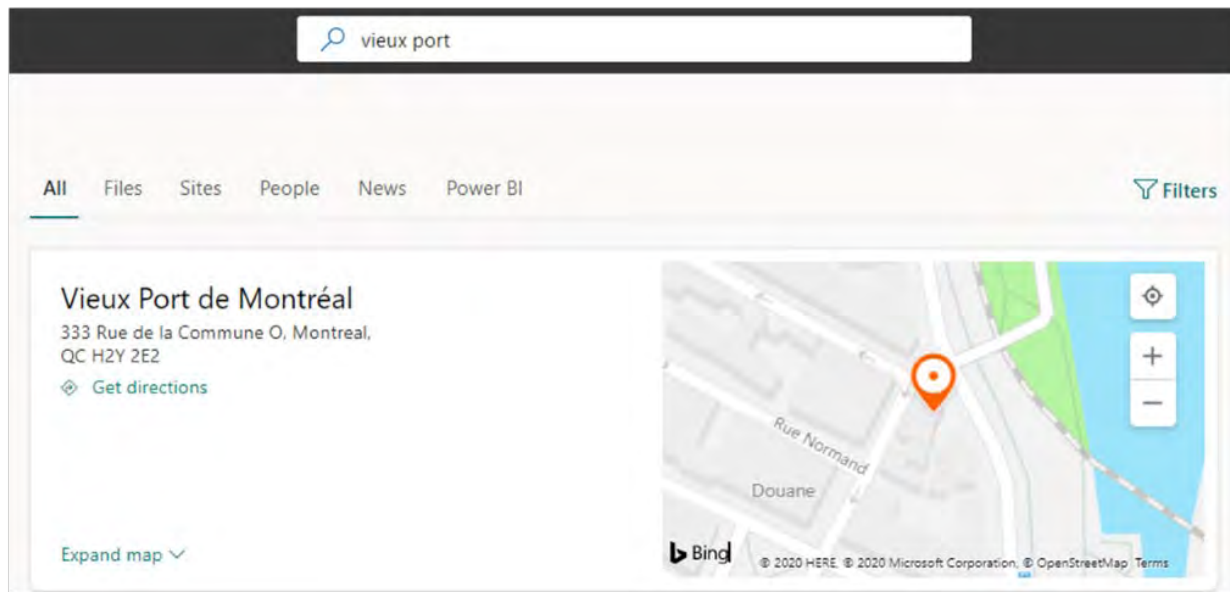
Floor Plans

Finding maps to where fellow employees reside or where a meeting room or space is located can save employees time. This often builds on the location's references and can be another easy way to improve search for users.

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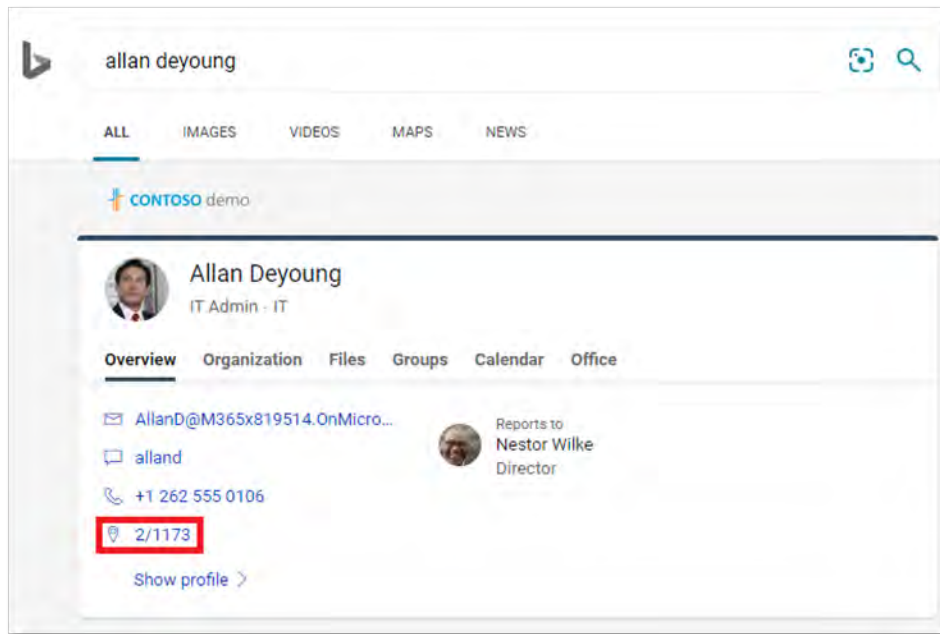
Microsoft Search Analytics

The search experience for Microsoft Search has built-in reporting. This reporting enables an administrator to get insights for the past 31 days or the past 12 months. These insights can be downloaded for analysis over a longer period to be easily shared or viewed in an admin dashboard. They are:

- Query volume trend graph – the total number of search queries over time.
- Top queries – the most searched queries in the period (with total and CTR)
- No results queries – no result queries in a time frame (and their count)
- Abandoned queries – queries searched for but not clicked (and their count).

In addition to these reports, there are additional insights from Bing that can be explored. Microsoft is committed to more insights such as aggregation options, date range filtering (more than 31 and 12 months), filter by source (which app in the Microsoft 365 search ecosystem was associated with the query), and more.

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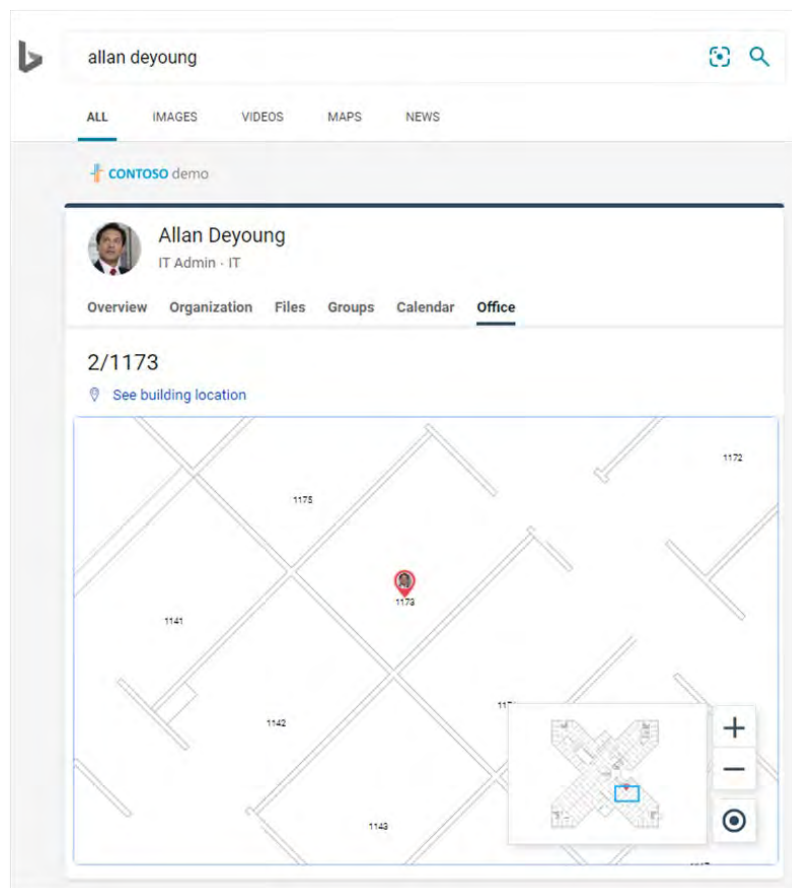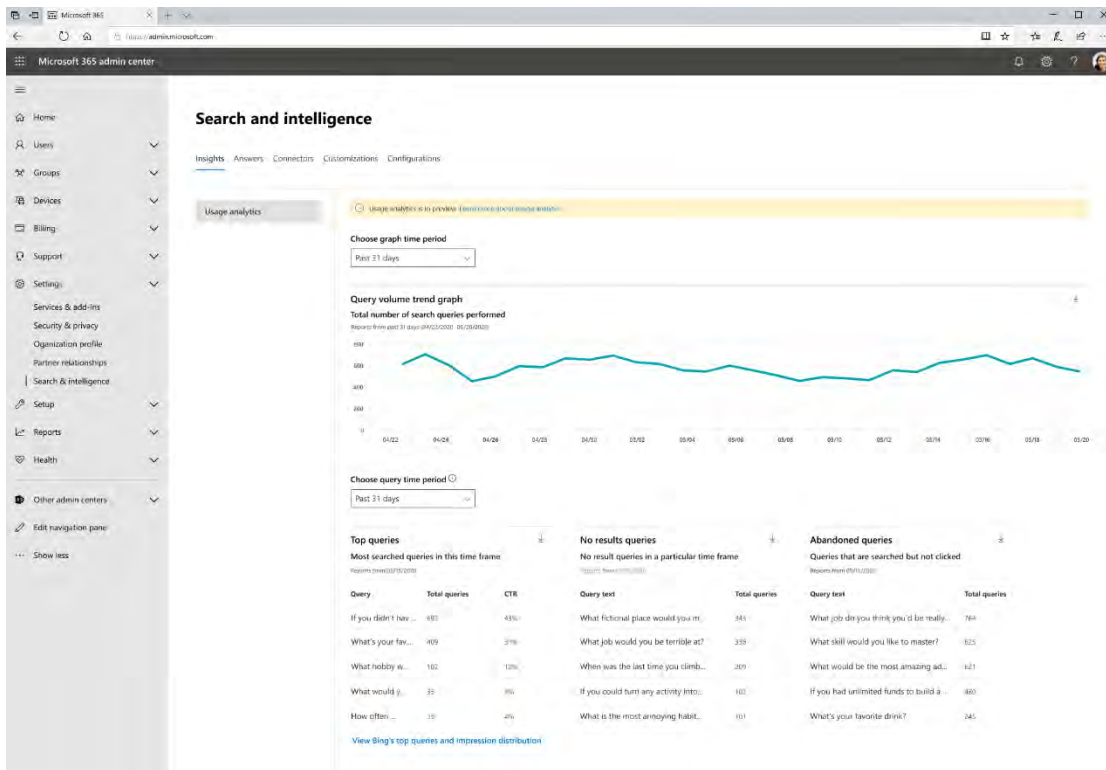
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Extending Search

With a small investment of effort, you can also establish your filters/refiners, further accelerating the ease of finding key information.

To get started, consider beginning from this PnP baseline: https://microsoft-search.github.io/pnp-modern-search/
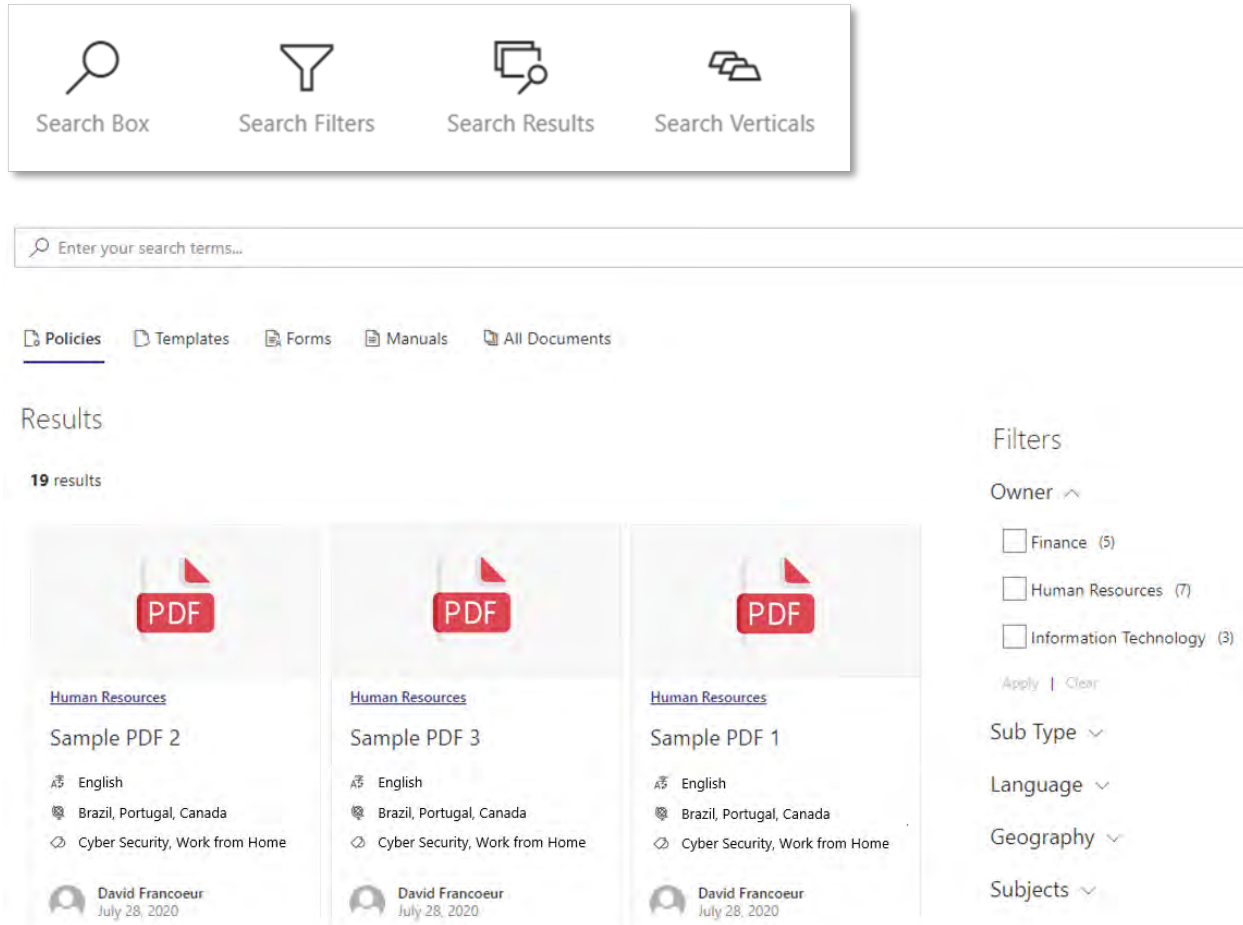
This new set of tools, while still in preview, is a massive step in the right direction for many long-term SharePoint users who had come to expect a fully customizable search experience. With tailored experiences like those above in place, an administrator can ensure search queries from the now persistent search box can redirect users to the desired page (see PowerShell).

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Connecting Search

Microsoft Graph Connectors can be leveraged in Microsoft Search to bring data from other systems/services into the Microsoft Search experience (across the Microsoft endpoints) and even launch the user to the best tool, app, or experience for working on that content.
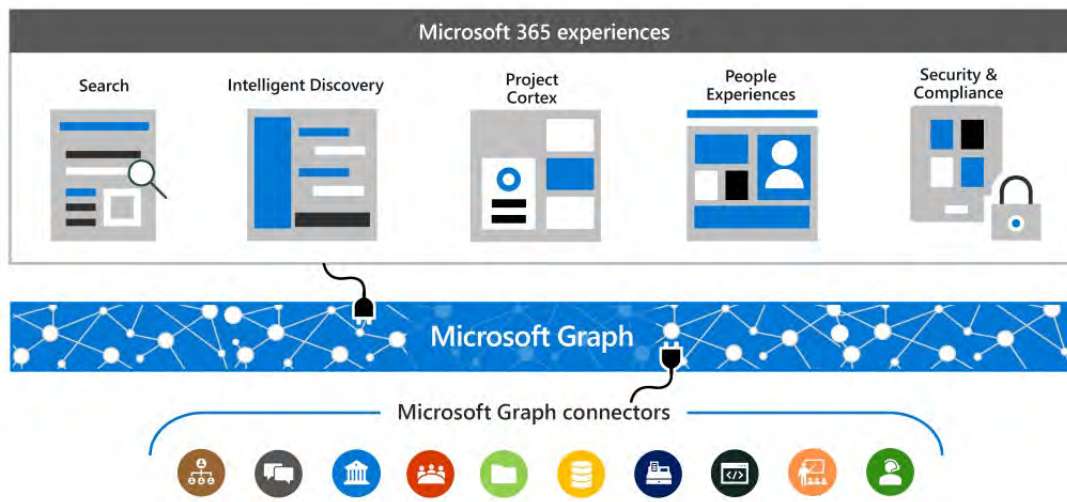
This enables scenarios where there is 1st party support from Microsoft. Microsoft has already created a connector for multiple systems/services, and a 3rd party ecosystem has over two hundred additional proven connectors.

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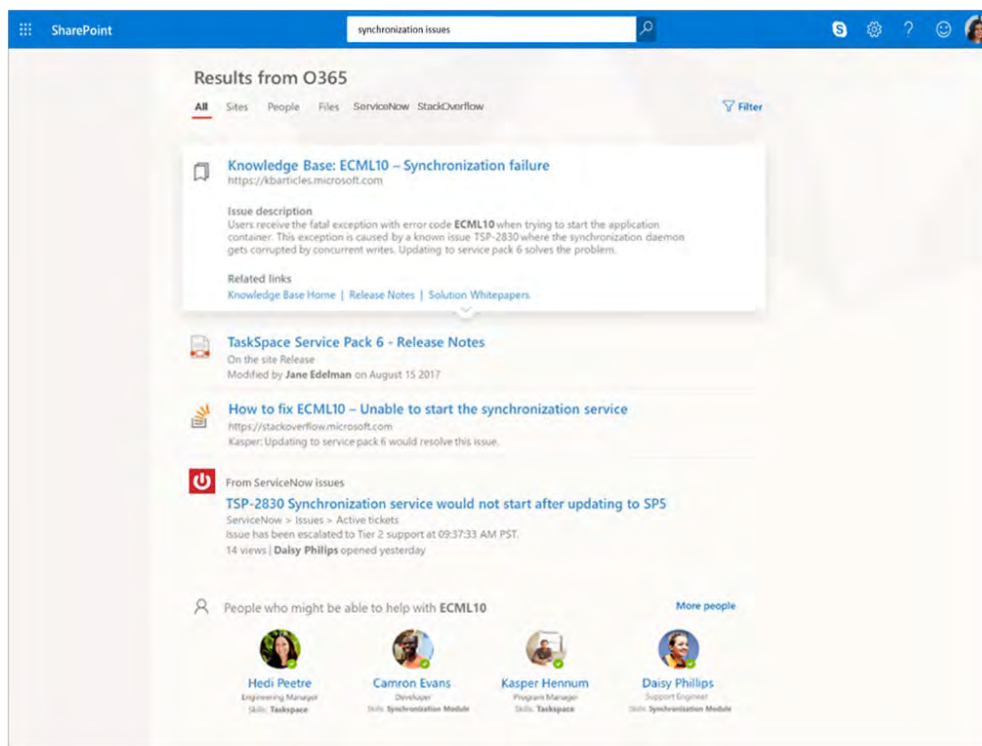
This isn't only limited to the Microsoft Search result pages in SharePoint. You can also surface this data in the other Microsoft Search experiences as well. This enables scenarios for discovery that are intelligent and integrated in the graph. As an example, consider discovering recent documents across sources without using search. This Box document shows in 'Recent' and in 'Recommended Results' (driven by search and the Microsoft Graph) on the Microsoft 365 home page, in Delve, and the Edge browsers new home experience.
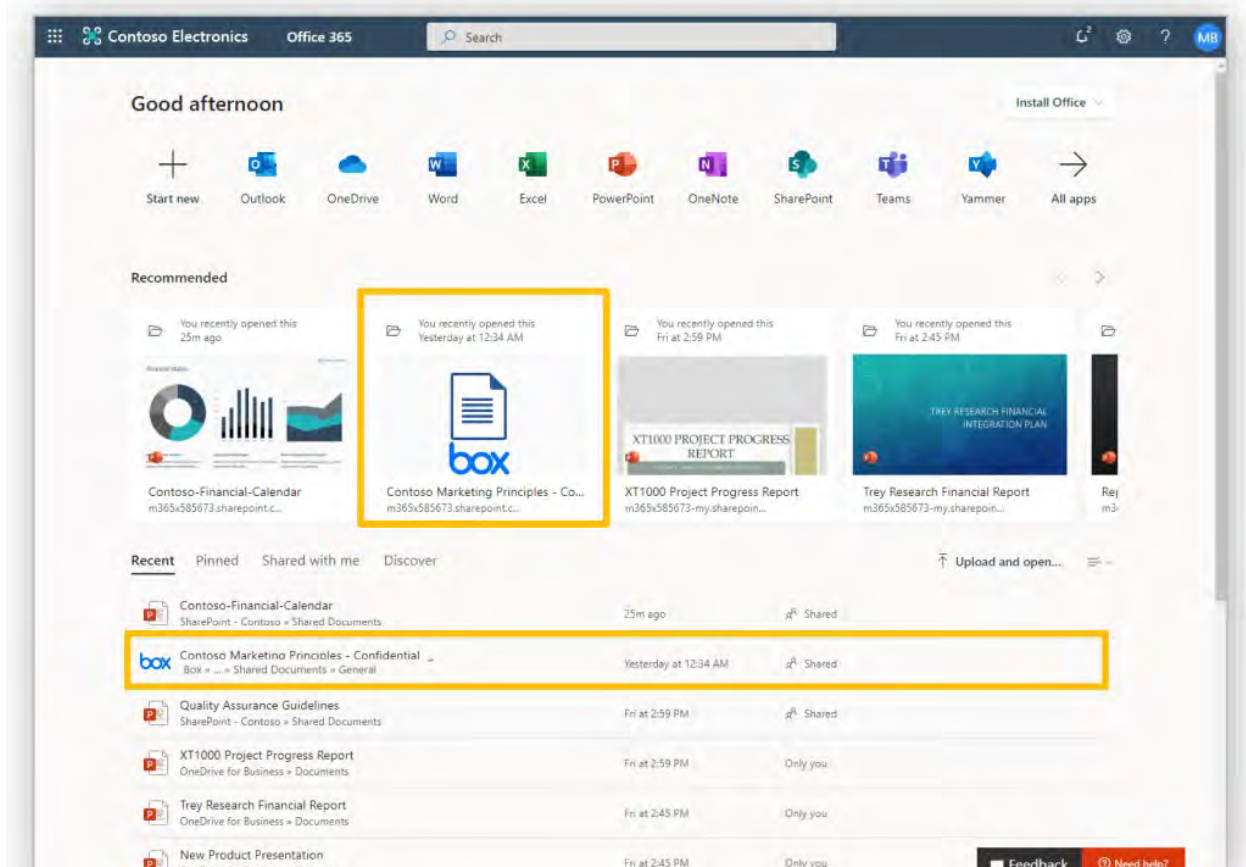
Even profile cards or references to another peer's recent documents can surface these related (external to Microsoft 365) assets in a intuitive and integrated way.

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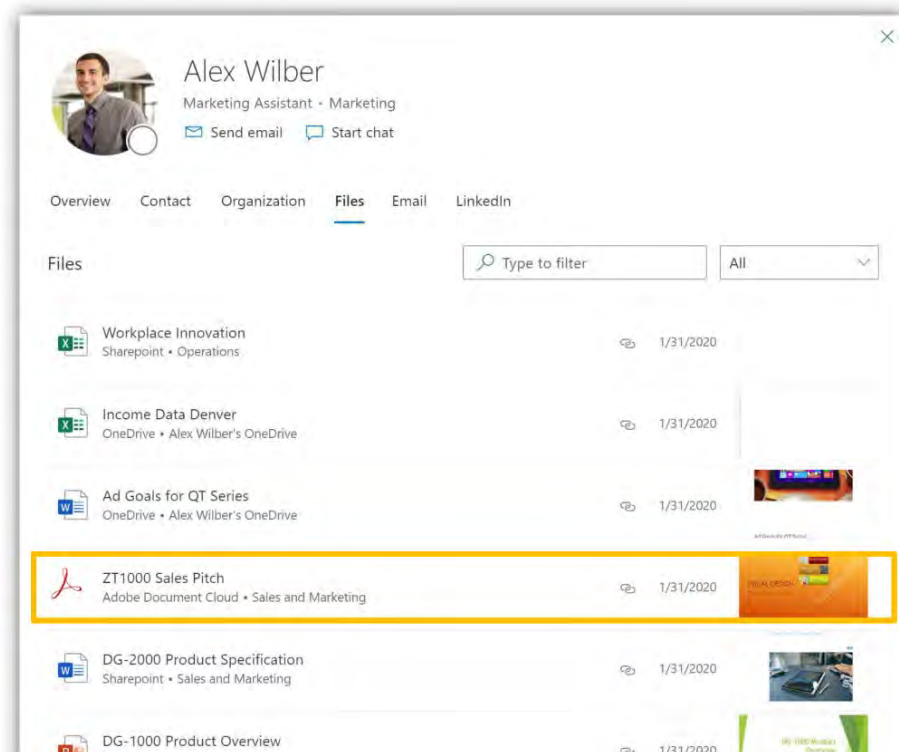
Providing ways to bring resources into your knowledge network experiences is another benefit of extending Microsoft Search with Graph Connectors.

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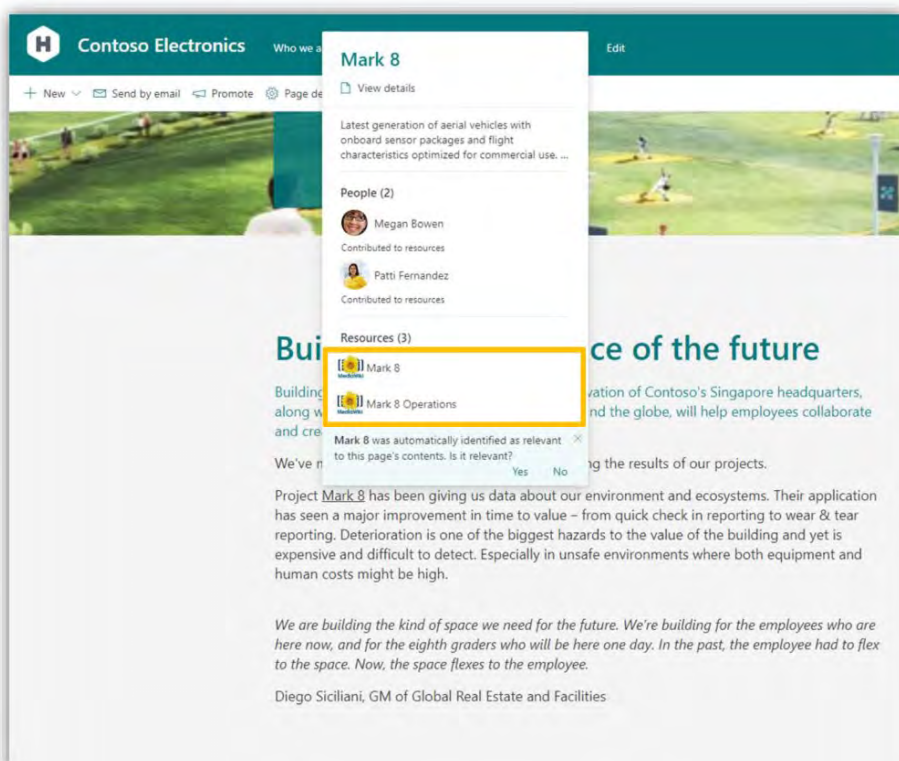
Like the experiences provided by Project Cortex and SharePoint Syntex (the knowledge network solution built on Microsoft 365), these new experiences can surface connected content, which can then be leveraged to improve topic computation and meet a broader set of knowledge management needs.

SharePoint Online Search Limitations

Suppose you are using the Highlighted Content heavily in your Intranet design. In that case, it is crucial to understand whether immediate results or items being added to the index will impact user expectations or the design itself. Microsoft 365 content can take anywhere from less than a minute to 15 minutes or even hours (in extreme circumstances) to show recently updated data based on search.

In some cases, even a minor delay may be an issue for some components within the Intranet for things like news or announcements where urgency may be paramount, and a REST API call may be recommended over search.

It is important to understand that Microsoft controls the Microsoft 365 crawl schedules, and you have limited control or influence beyond the options they have enabled. While Microsoft has continuous crawling enabled on each tenant, it is impossible to control SharePoint Online's crawl frequency, unlike a SharePoint on-premises environment. This means that there is no way to guarantee that content will be indexed and available in search results within X minutes.

Search crawls occur continuously to ensure that content changes are available through search results as soon as possible. Recently uploaded documents may not immediately be displayed in search results because of the time required to process them. SharePoint Online historically targets between 15 minutes and an hour between upload and availability in search results (also known as index freshness). In heavy environment use cases, we have noted that this time can increase to up to six hours.

Beyond the timing of crawls, it may be important to understand other search limitations that are different from SharePoint on-premises or that can have an impact on your Intranet planning.

SharePoint Hybrid Search

While this is still an option, keep in mind that for other non-SharePoint systems, you should shift your time and attention to Microsoft Search and its connector framework/model to bring results into the new unified search experiences.

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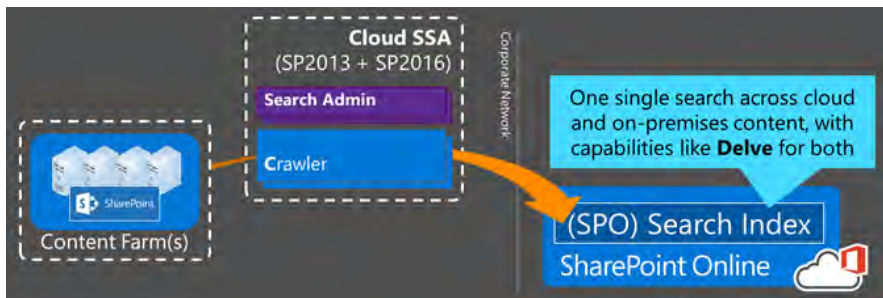
Suppose you are looking at a Hybrid scenario with SharePoint on-premises and your Intranet in the cloud. In that case, you can unify the search index for Microsoft 365 and SharePoint on-premises by using something called the Search Service Application. This provides ways to leverage modern Microsoft search and the Intranet search along with any legacy or highly customized content on-premises.

One of the key considerations here is that it reduces the server footprint for search on-premises, saving quite a bit of money for larger organizations. On the other side of cost, for every 1 million items in the index, 1TB of storage is required in Microsoft 365 (this is just how the costs for indexing large corpuses are managed from a price standpoint – it does not add to tenant storage). This doesn't add up to much in potential added costs, but it can be worth understanding for smaller organizations with millions of items. The US costs per GB per month today is $0.20, meaning that 1TB or 1 million items per year is approximately $2,400.00 more a year. Keep in mind you get your first TB free and then get storage based on the number of users you have.

Predictive Search, Zero-Term Search & Surfacing Search Results Together
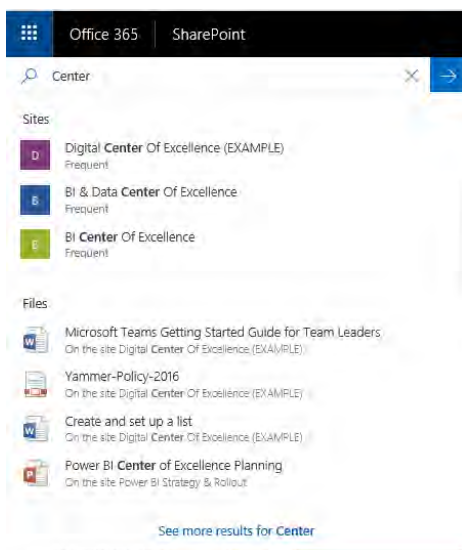
Your global search should provide 'search as you type' previews of what the user is looking for to reduce the need for them to go to another search page if it's a typical/common search. The good news is that this is built into modern search experiences in Microsoft Search. The downside is that these modern experiences are limited today based on how they have been implemented. While you can see a preview of search results, it may not be all the results you would like to show, and you can't control this experience/display in modern search.

By default, the modern search box is scoped based on the hub site or site you view (depending on if the site is a member of a hub site). As a result, the only global search box with this functionality today is surfaced on your tenant's SharePoint homepage, which may not be a page users navigate to often. See Extending Search above for how search scopes can be modified.

You can, of course, build your global navigation (recommended in the navigation section). This global navigation could have a predictive search as you type experience along with zero-term search results (meaning before they type anything, we could show things like the most recent or popular results).

Users may be searching for a person, a document, or a site/group/team. Instead of forcing the user to initially choose when searching or navigate to a results page and further refine their query, we can provide a combined set of results to meet the vast majority of common search scenarios in that same rich preview.

Highlighted Contents Web Part
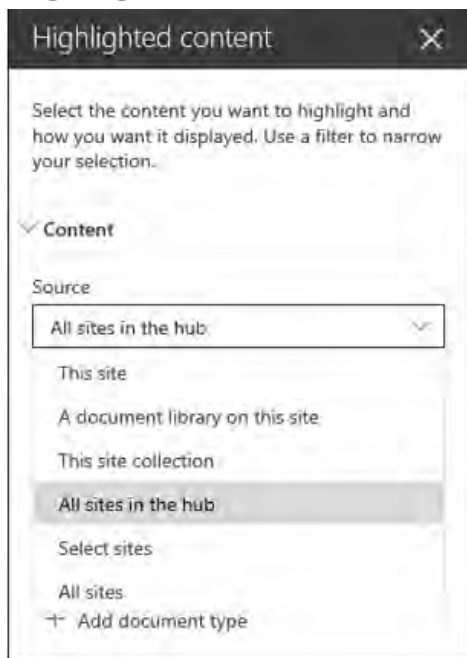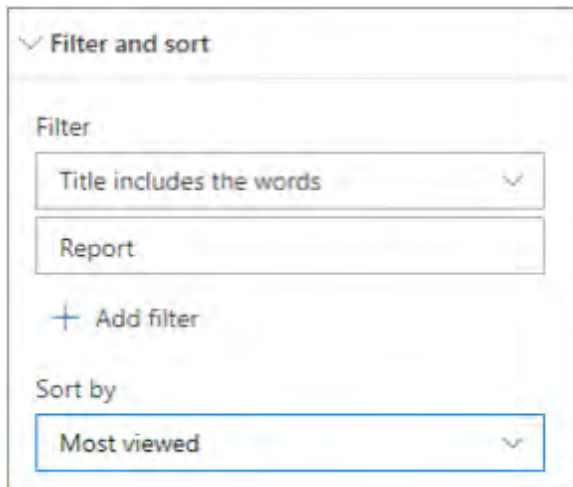
The highlighted contents web part is a modern web part available in modern pages/sites. It is an extremely powerful and versatile OOTB control for rolling up content onto modern Intranet pages.

You can use this web part to dynamically display content from a document library, a site, a site collection, all sites, targeted sites in a hub, or all sites in a hub.

By default, this web part shows your most recent documents, but it can be configured to display other types of content, including:

- Pages
- News
- Videos
- Images
- Events
- Issues
- Tasks
- Links
- Contacts
- Other Content Types (you add them)
- All

Once you have selected your content source and type, you can set filter and sort options to narrow down and organize it.

Lastly, you can choose how to display the content. Today, this control supports four layouts, including card, list, carousel, and filmstrip, with control over the number to show and whether to show the web part if no items are detected.

This is the preferred OOTB control to use for many aggregate-based rollups in a modern-based SharePoint Intranet. Still, suppose you have specialized look and feel considerations (for the way it should display). In that case, you may want to build your variant of this control using the modern SharePoint framework extended with whatever additional look and feel styles you would like to see.

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4.3. Getting the Most Out of News & Pages

Microsoft 365 has rolled out an entirely new set of pages based on responsive and modern web patterns. These pages or news posts make the editing experience easier and consistent, whether on a tablet or a computer.
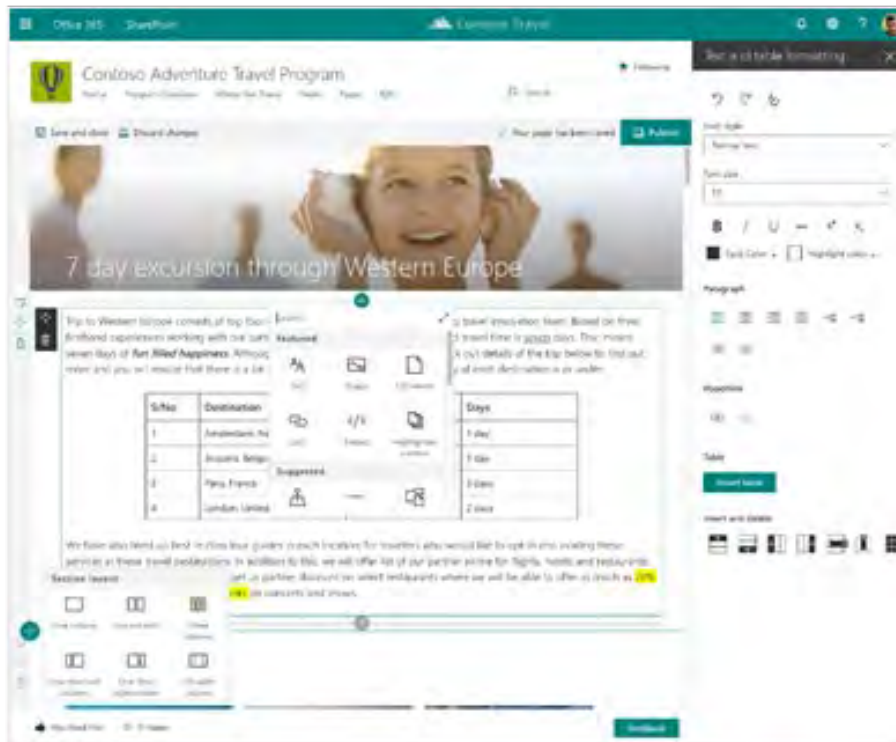
These pages have quite a few capabilities.

- **An out-of-the-box experience for authors and readers -** The page layout uses sections and is responsive by design. This not only makes consumption of this page great on mobile or tablet devices but is also optimized for authoring on smaller tablet devices as well. Authoring is also fast, as there are no page reloads when editing controls on the page.

- **News pages surface in more places -** The news isn't just in SharePoint or the SharePoint site where it was created. It can roll-up in the hub site, show up on the SharePoint home page, be found in the SharePoint mobile app, and more (with much more coming). It's not just the improved visibility and consumption options that are important here. Many of these experiences also have special features oriented around the experience. Here are a few simple examples:
  - o News that shows up in SharePoint can be saved/bookmarked to be read later.

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- o When a relevant news article is posted by someone in your close sphere of work - derived from the Microsoft Graph's intelligence, you will receive a notification on your mobile device from SharePoint within your device's notification tray. When you click on the notification, you are taken directly into the SharePoint mobile app to view the news article.
- o News posts can be shown [automatically within a Microsoft Teams channel](#) as part of a channel conversation.
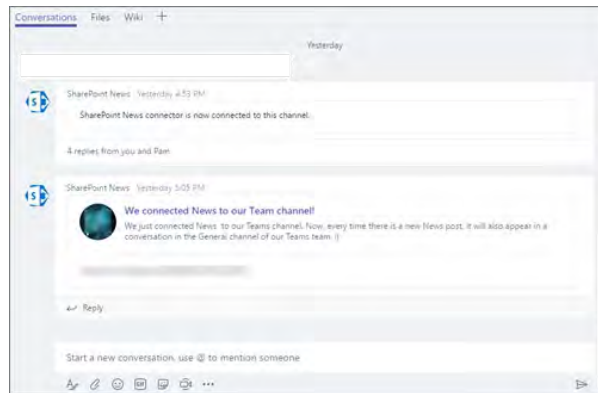
- **More web part options to get authors started on making compelling page content.** SharePoint pages have some unique web parts that help streamline or improve the authoring experience and often the consumption experience (for example, Events allows a user to add an event to their calendar).

News can be rolled up and displayed via a Microsoft News web part. This control has multiple visual styles in which it can show and roll up news.
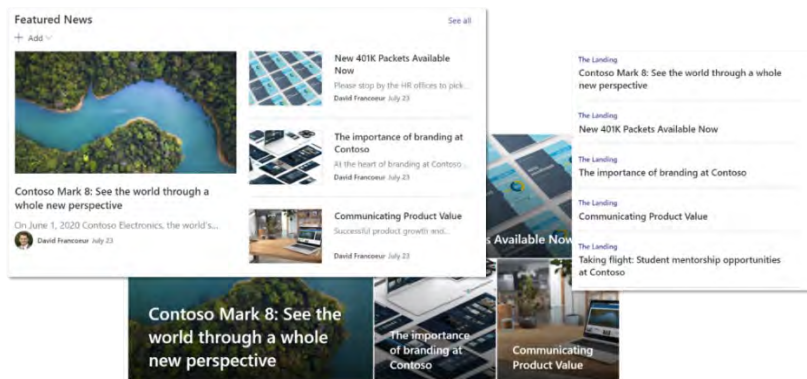
4.3.1. Styles & Layouts

Sections can be a great way to think about a page design or layout. Dividing the page into 'zones' and then organizing key components in each zone often leads to a better experience for these pages' consumers as the user journey on the page has been thought out. The prioritization of some content/components has also been considered.

When determining a layout for pages, particularly those that will become templates, here are some things to consider:

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- What is the expected volume of news content?
- Will there be a difference in the presentation of "Featured" News versus "Secondary" News, or between Corporate News and Community News?
- What is the expected volume and usage of event content? Is a page/news post the right fit?
- What is the desire, if any, to integrate social media?
- Will video content be available and produced regularly?
- How should content from communities flow up to the Home page?
- What is the quantity and quality of available imagery?
- Who has access to this imagery?
- Are there specific features that are desired (e.g. Yammer)?
- What is the quantity of documents that need to be surfaced to help determine the correct pattern?

Additionally, your pages can be designed in sections with section backgrounds for horizontal or vertical layouts, making reading the page easier for your page consumers.
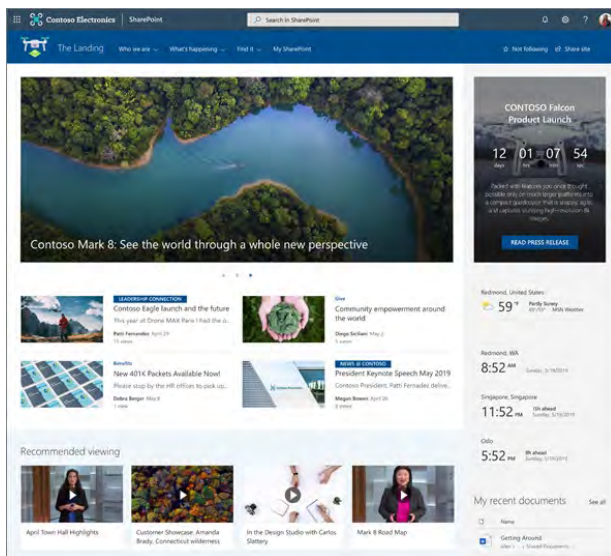
While it can be tempting to crowd your pages with as much functionality as possible, adoption success is bolstered by starting simple and building from there once the content is developed to support it.

- Don't <u>overwhelm</u> visitors
- Keep priority content <u>front and center</u> (F Pattern)
- It is better to have less, more <u>dynamic</u> content than more static content

- Leverage <u>quality</u> content that is already being created (e.g. Twitter)
- Inject and provide <u>personalization</u>
- Stick to <u>common</u> patterns across communities when possible
- Iterate! Once you've launched and have some data, you can make adjustments.

4.3.2. Images & Improving the Reader Experience

Not everyone has the picture that is just right for their news post. Still, SharePoint makes this much easier with either organizational images you provide or end users' ability to search and add imagery from online web searches or Microsoft's provided stock images. This provides a simplified and streamlined way for communicators to share approved imagery with their fellow content creators.
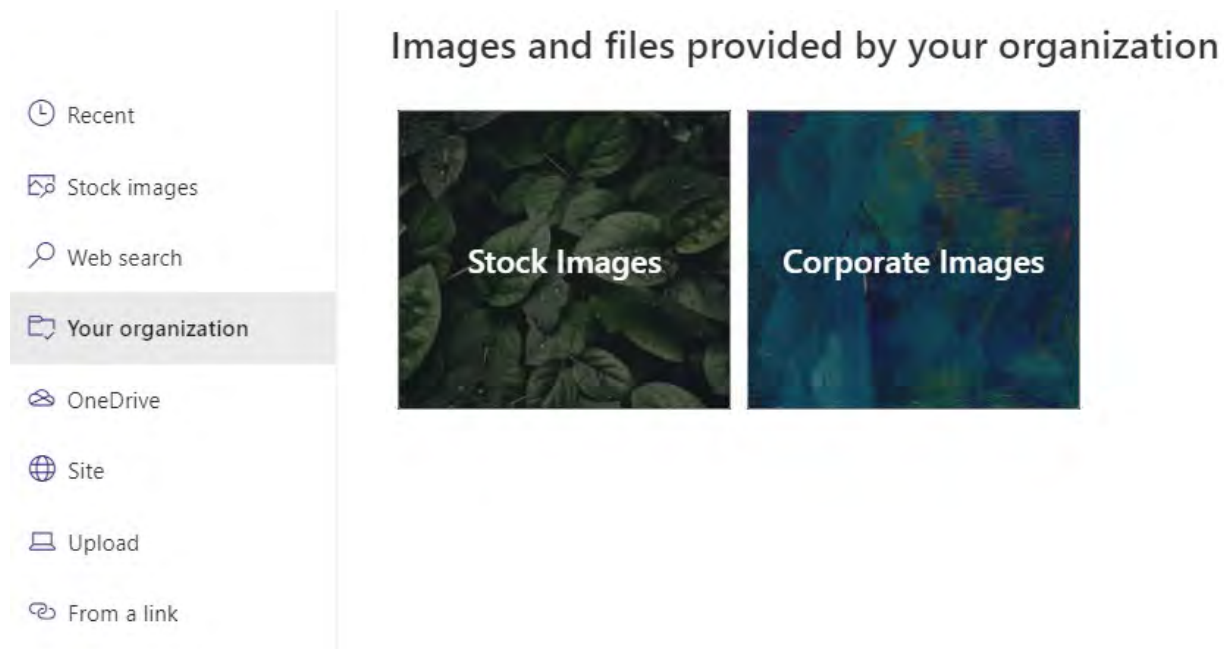
4.3.3. More Templating and Ease of Templating News Pages

News pages can be saved as templates easily, allowing for the re-use or acceleration of content creation. This saves time and helps other users across the organization develop more effective content based on effective templating. For example, for departmental sites, you could have a page/news template representing an employee spotlight from that department that could then be rolled up on the Intranet homepage and organized with other spotlights.

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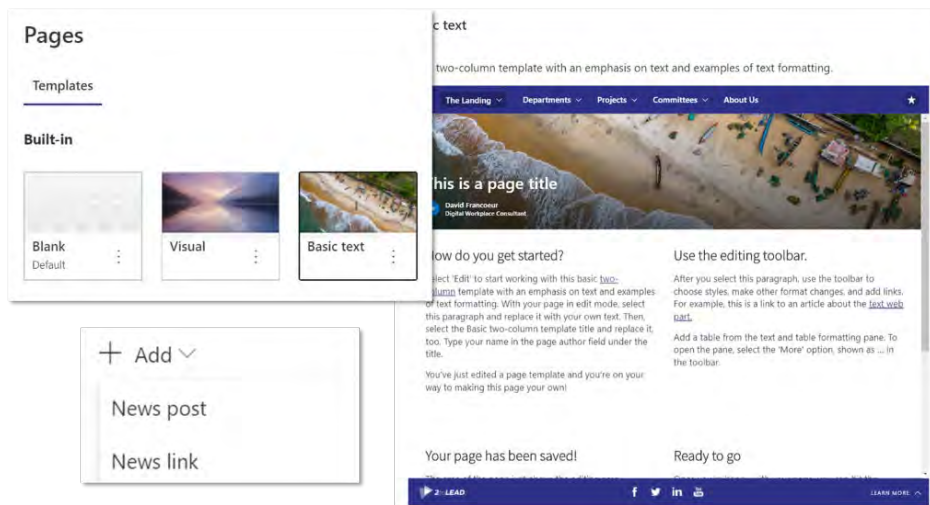
Optimally your page designs or templates are made up of planned components, sections, and layout options determined by:

1. **Best Practices** in user-centered design
    *   What typically works well for this type of component, web part, or section?
2. **User stories**
    *   What did we hear from the users that they wanted to see?

4.3.4. Boosting & Organizing News

Not all announcements and news are equal. Sometimes you need to **boost the visibility of important news articles** in the feed rather than relying solely on manual curation. You can soon boost a news post until it has been read, for a set number of impressions, or until a given date. When the criteria is satisfied, the post returns to its normal position in the feed.

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SHAREPOINT NEWS

↗ Contoso's commitment to sustainability

↗ Store Opening Guidance
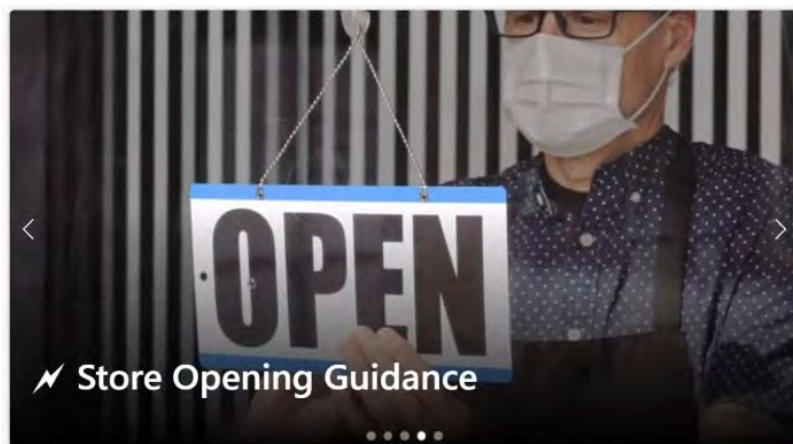
4.3.5. Automatic News Digest or Auto News Digest

Keeping up with so much news and information can be challenging. For help staying up-to-date with workplace communications, the automatically generated news digest will send an email summary, curated by AI, of news articles you may have missed or not read that week.

The digest will help ensure people stay on top of news that you have posted, and you can customize the news digest with your organization's branding.
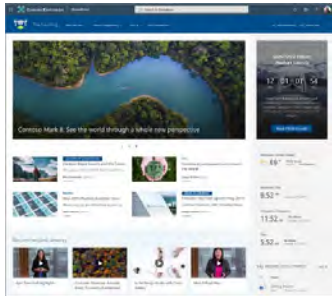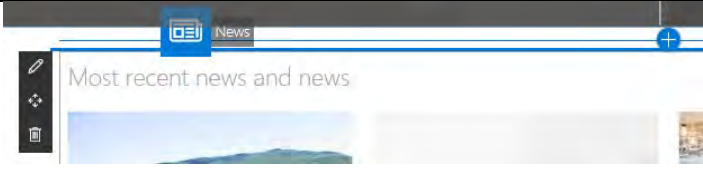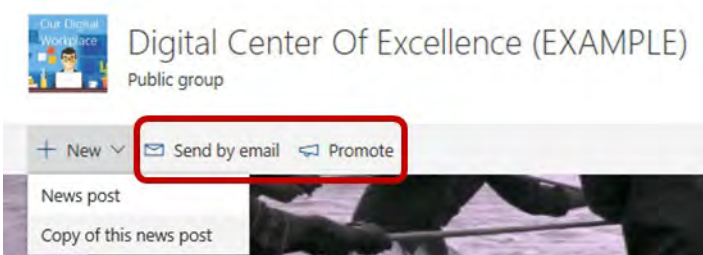
4.3.6. Leveraging SharePoint Online Web Parts
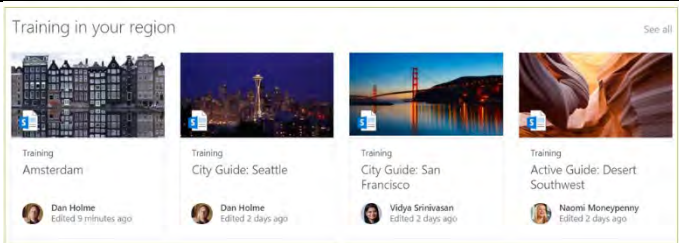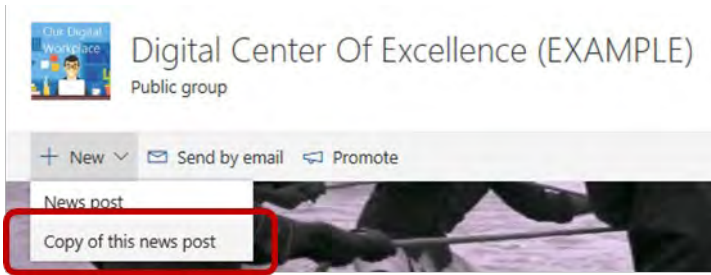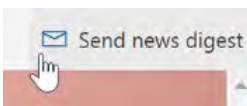
The web parts and features in SharePoint modern pages provide building blocks to create engaging and dynamic content. These are growing, regularly improving extensible (so you can build your own or add 3rd party ones), configurable, and easy to organize or layout.

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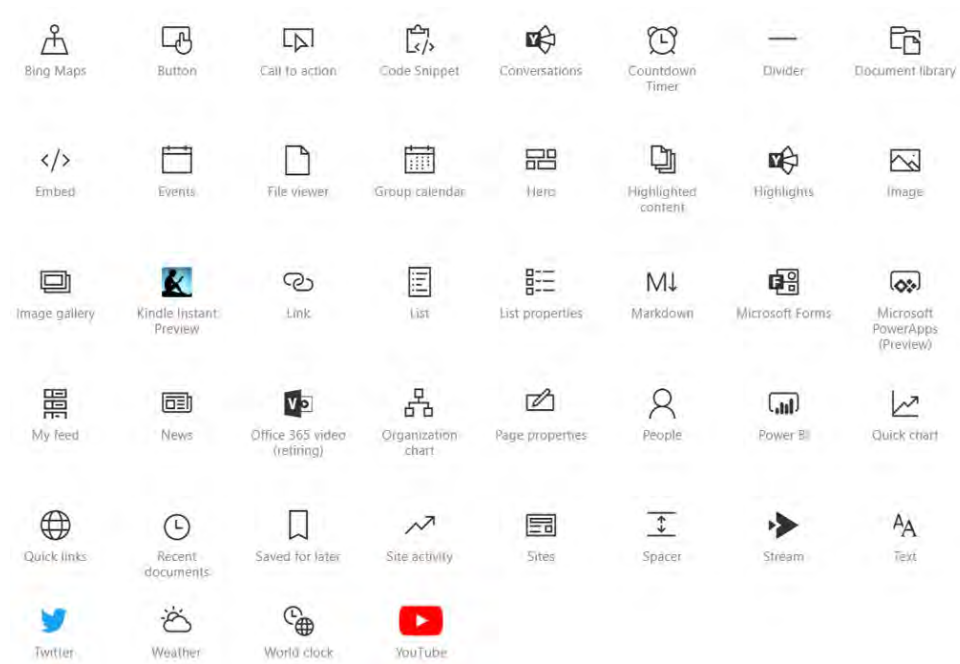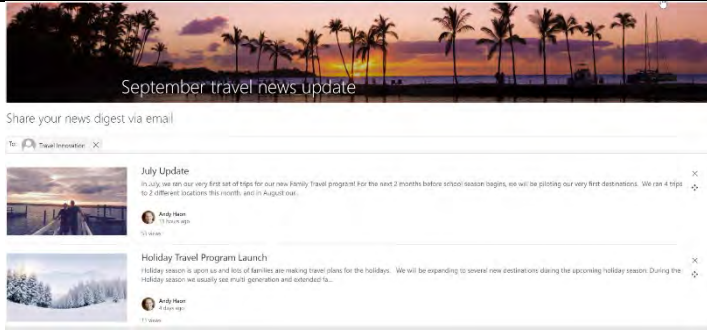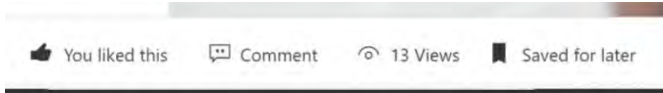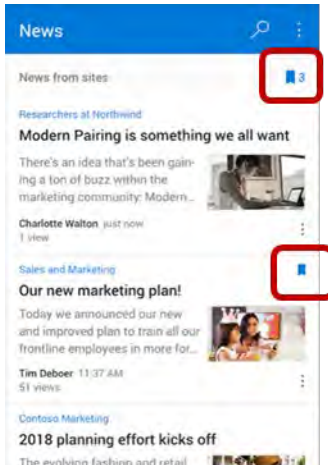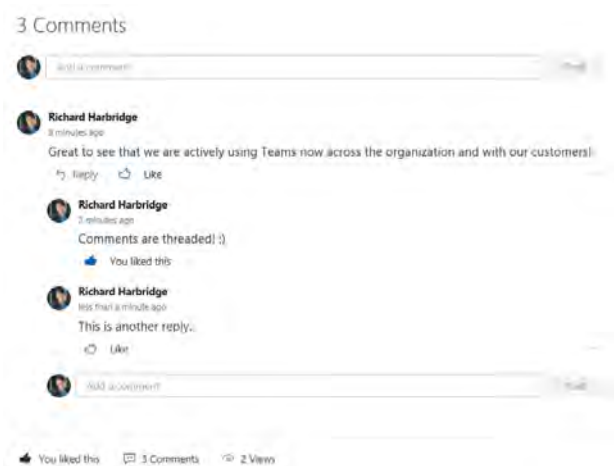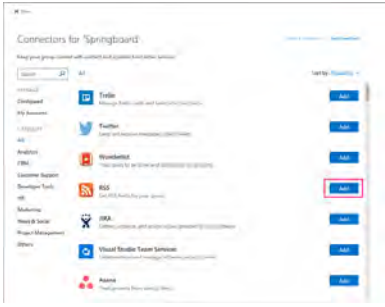
What follows is a simple summary of the 50+ capabilities that are currently available on SharePoint pages.
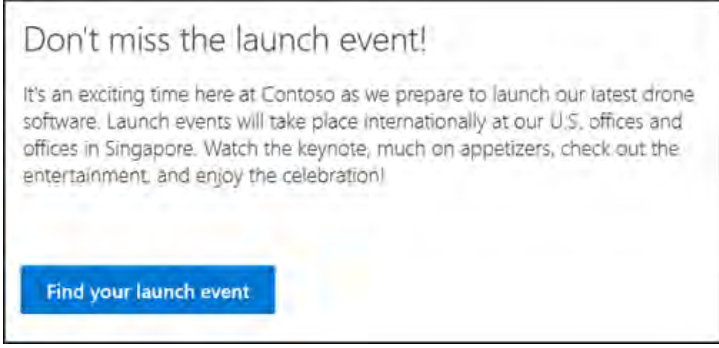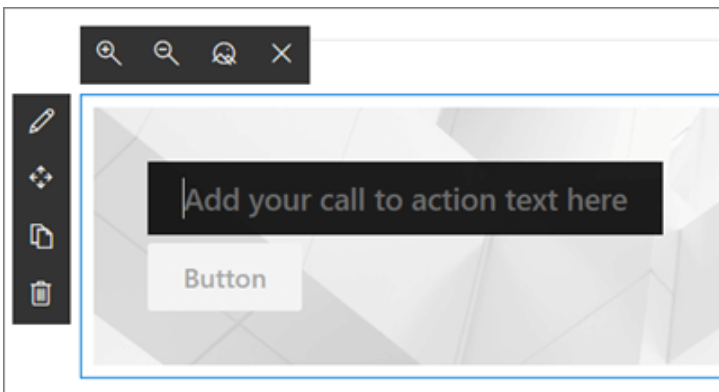
Capability	Web Part Description	Purpose
Page Title Image	While the image can be removed to leave only the title at the top of the page, a simple and easy-to-use interface allows users to set a focused image to go along with the heading of their modern page's content. 	Layout
Sections	Modern pages can be broken up into sections. To do this, the user simply hovers over or selects the space between existing sections and can add the preferred section layout of their choice. These sections are designed responsively to flow the layout appropriately when the screen size changes. It is also effortless to move web parts from one section to another. You can select variants (column and row layouts) for sections within SharePoint pages. To show content side-by-side, you can add up to three columns to each section. Vertically, you can have multiple sections with varying numbers of columns, including the new floating "Vertical Section." 	Layout
Move & Reorder	You can reorder your page any time when editing it. This works across browsers. Just click on the web part you want to move and drag it to the + position in your chosen section.	Layout

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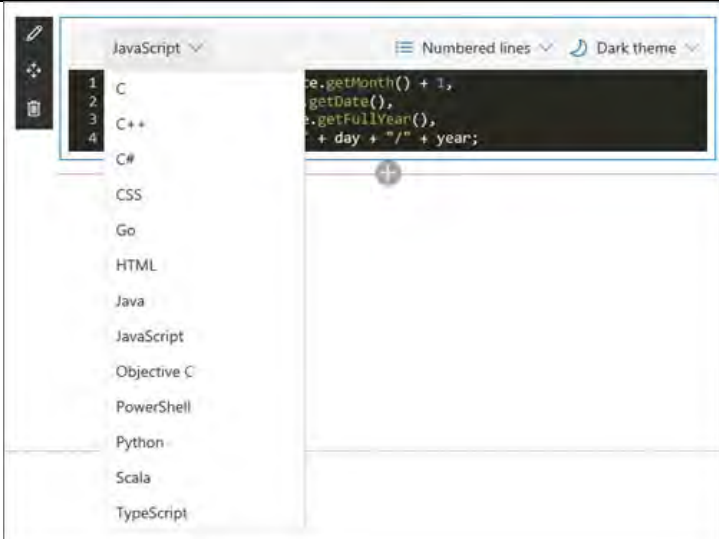
Capability	Web Part Description	Purpose
Improved Sharing	Users can share helpful articles or pages by email, including a link, thumbnail preview, description, and optional message to one or more people. 	Engagement
Audience Targeting & Categorizing	By the end of 2018, news can be designated as an organizational news source. As news rolls up to people across their SharePoint home in Microsoft 365 or via the news tab in their SharePoint mobile all, the news that comes from "organizational news source" sites will get special visual treatment bubbling up to the top of one's view. Additionally, you can better define what news articles and pages appear on your site's home experience by configuring what is visible to specific groups. Each person will have a unique experience that complies with what you wish them to view without creating multiple audience-specific sites. You can serve them all from within a more centralized location with a personalized, targeted experience. Audience targeting support will be enabled in news, pages, and other web parts so that you can define and target who best to reach with content and site experiences.	Engagement, Roll-up

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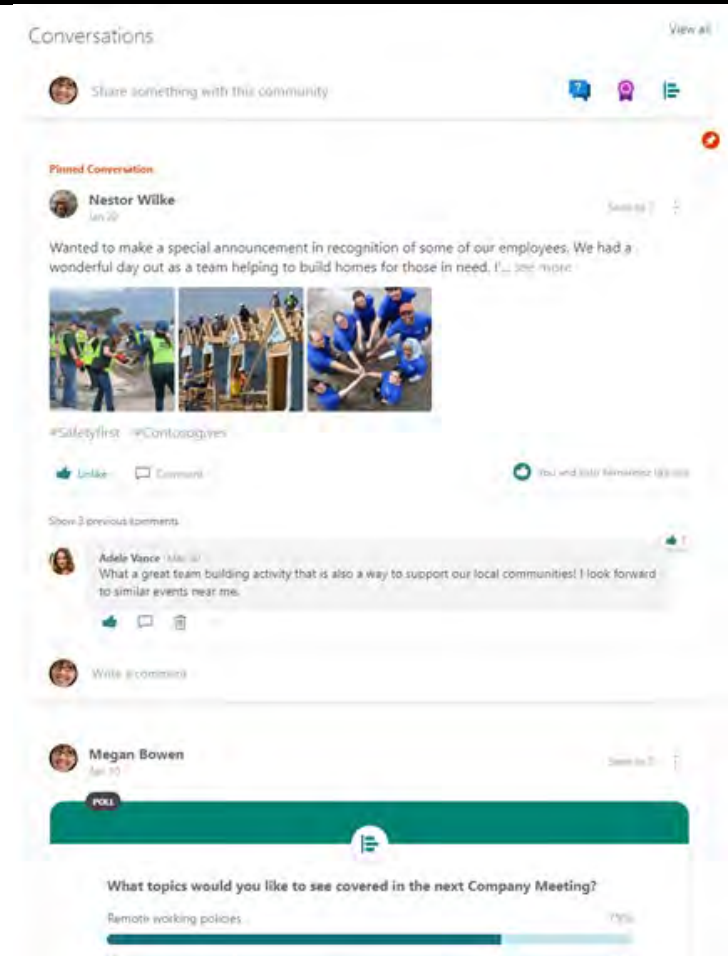
Capability	Web Part Description	Purpose
Copy News Post/Page	If you have a series of pages you've created with a similar layout and design, you can now go to an existing page and use it as a quick start to create a whole new page – but with a head start. From an existing page, click New and then select Start with a copy of this page. The service will create the new page, and you simply jump into updating with new text, images, and content updates, with layout, design, and common text already in place. 	Engagement
Email A News Digest	Users can even send a news digest. (Roadmap item 21047). Increase the reach of and combine select news articles into one consolidated email update. From the complete list of news articles, select specific news items, click Send news digest to send an email to a group or individuals with clean previews and links to the complete news articles.	Engagement

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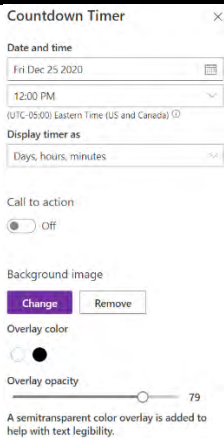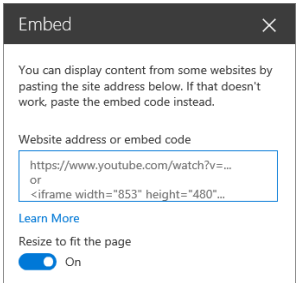
Capability	Web Part Description	Purpose
Save / Bookmark News	Before the end of 2018, you can now save news articles to catch up on later, right from your intranet's Web interface - as you can today on mobile.	Engagement
	Simply click Save for later from the bottom of the news article, and it gets added to your saved list, accessible from the Me tab in the SharePoint mobile app. You will also be able to access your saved list from SharePoint home.	
	On the SharePoint mobile app, users can take pages that have been published as news and save them for review later (using the bookmark icon).	
Comments, View Counts & Liking	On each page, in the footer, a like option, comments, and the view count are visible (if commenting is activated) for the page. The comments support basic threading (you can reply to a comment, but you cannot reply to a reply). The view	Engagement
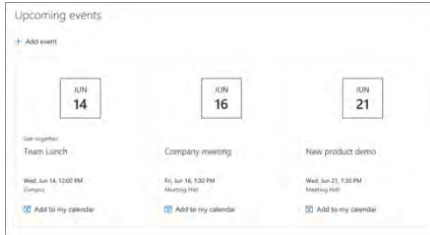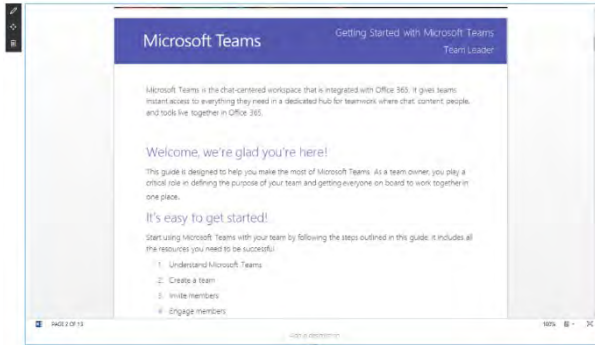
Capability	Web Part Description	Purpose
	count is also surfaced in specific pre-built experiences such as the news web part. Like in Outlook conversations, it is possible to @mention someone within the comments of a news article, and they will be notified and brought into the discussion.	
Bing Maps	 Use the Bing maps web part to add a map to your page. Simply enter an address or a well-known name, and your map will appear. You can choose a different map type, such as road or aerial. You can also change the zoom level or give your map pin a friendly name.	Reference
Connectors	 With the Connector web part, you can get messages, alerts, and notifications from your favorite external services on a group-connected team site page. For example, you can show	Roll-up, Integration

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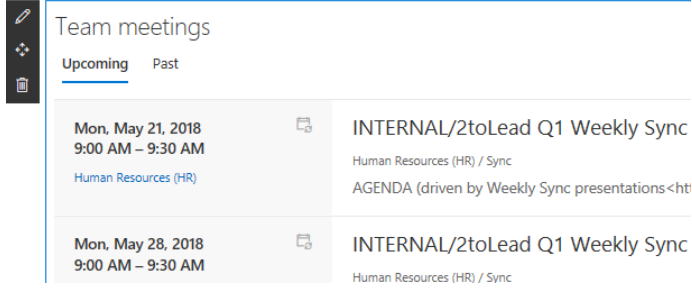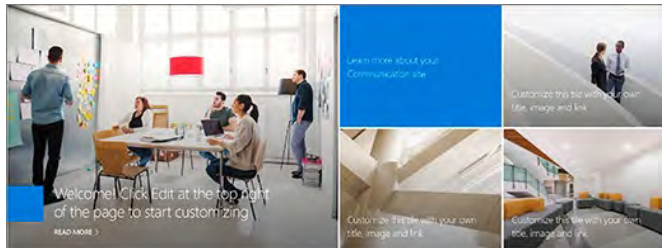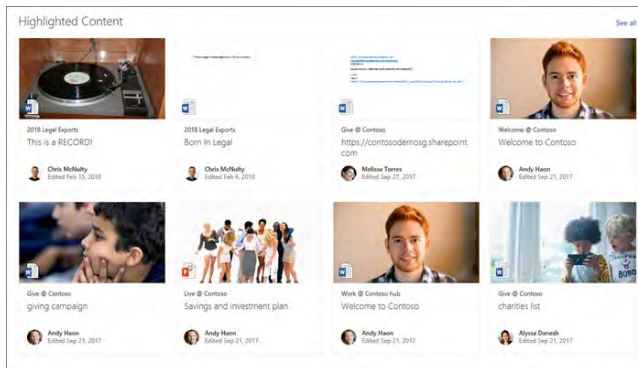
Capability	Web Part Description	Purpose
	updates from services like Trello and Facebook; alerts when something new is published in an RSS feed; notifications from JIRA or GitHub; or even summaries from Salesforce and Google Analytics.	
Button	The Button web part lets you easily add a button to your page with your label and link.	Reference, Navigation
Call to Action	The call-to-action web part allows you to create a button with a call to action for users.	Reference, Navigation
Code Snippet	The Code snippet web part allows you to easily display code as text on your page for others to use or learn from. You can select the code language and a dark or light theme. The web part even auto-corrects syntax.	Reference

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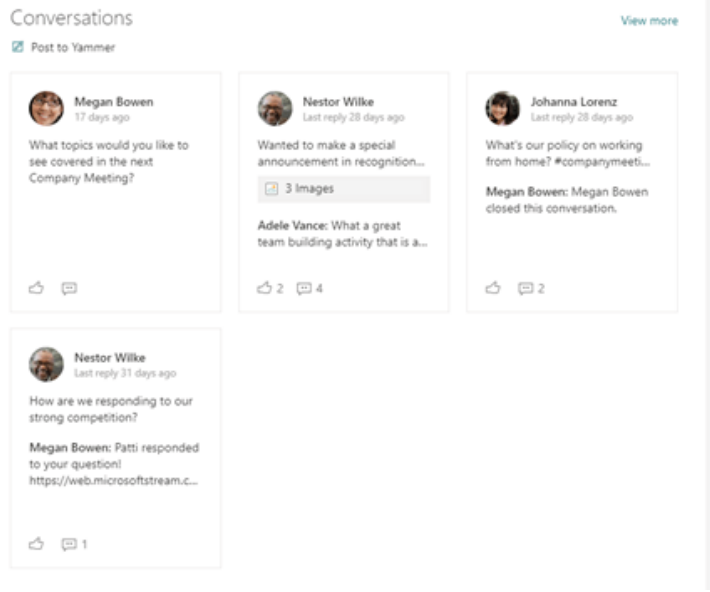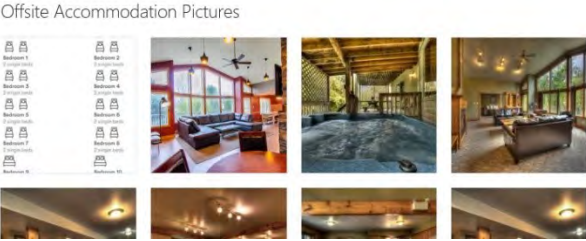
Capability	Web Part Description	Purpose
Conversations	If your organization has an active Yammer network (for example, www.yammer.com/2toLead.com), you can enhance collaboration by embedding Yammer conversations on your page. Keep in mind that this allows you to target a type of group conversations (top conversations, latest conversations, or targeted conversations) or a feed of discussion based on any group, person, topic, or home feed. This also now supports richer feed interactions like liking, @mentioning, adding content, and more.	Integration, Reference, Roll-up

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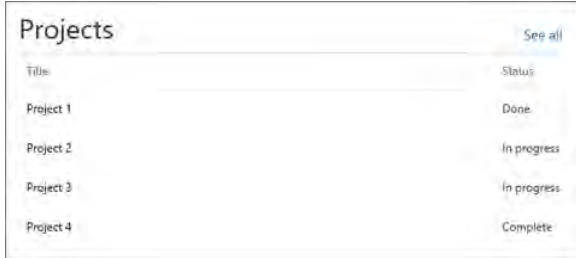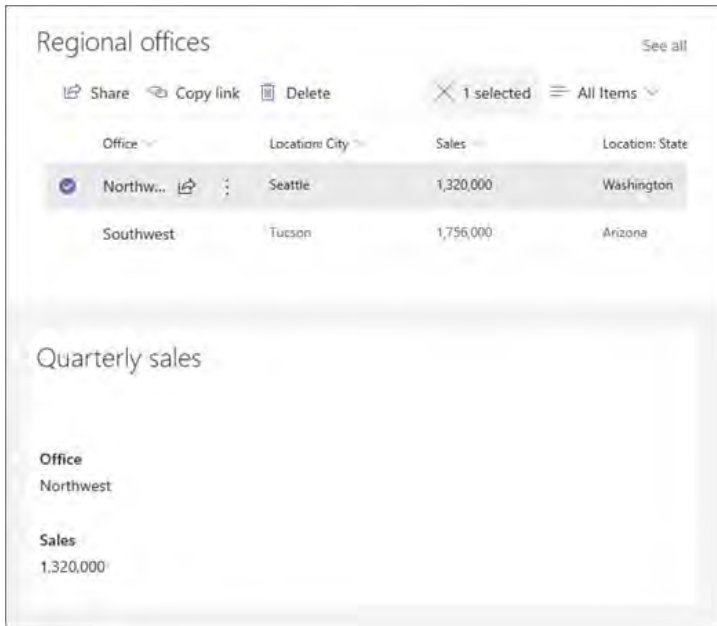
Capability	Web Part Description	Purpose
Countdown Timer	Use this web part to help highlight a key date/milestone coming in the future. This web part allows you to display a count down (or count up) to an event. You can add a title, set the date format, add a description, and a call-to-action button with a link.	Reference, Navigation

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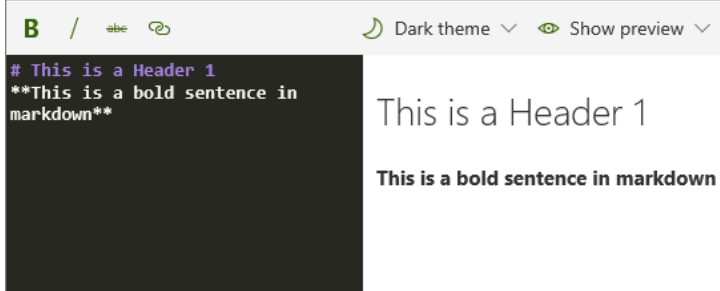
Capability	Web Part Description	Purpose
Divider	Use this web part to insert a line between other web parts to help break up your page and make it easier to read.	Layout
Document Library	The Document Library web part allows you to display a document library and customize it with your title, view, and even size. Users with appropriate permissions can view or edit files directly from the web part or go to the whole document library by clicking See all.	Roll-up
Embed	You can display content on your page from other sites like YouTube videos. Depending on the site, you can either use the site's address or embed code that the site provides.	Integration, Reference
Events	The Events web part allows you to add and display upcoming events on your page. You can even include more	Roll-up

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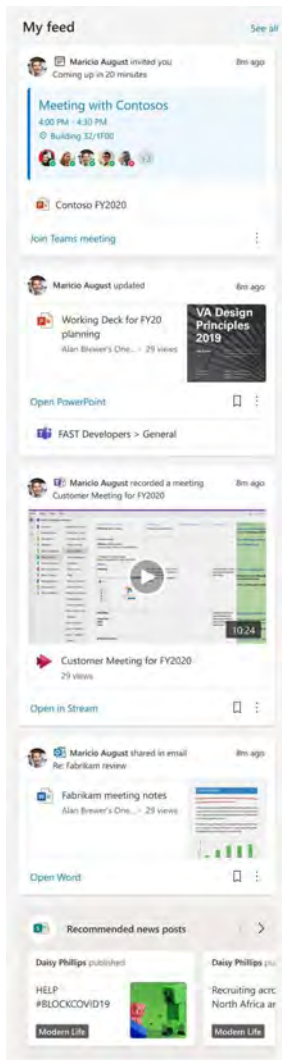
Capability	Web Part Description	Purpose
	beyond just the time and topic, such as a map with the location, online meeting information, a category, and more. This control has a visual presentation style that provides users with a quick and easy way to add a specific event to their calendar.	
File Viewer	Use this to insert a file on your page. File types you can insert include Excel, Word, PowerPoint, Visio, PDFs, 3D Models, and more. Keep in mind that this does not support every file type. So while it supports many rich interactive file viewing experiences, there may still be some file types that do not work with this control today (it will not let you select those files and will not show them in the navigation as it filters for only files that would render appropriately). Today Microsoft supports over 300 file types with rich previews. Still, that capability is in document libraries, within search, and OneDrive for Business today and is different from this interactive file viewer.	Reference
Group Calendar	The Group calendar web part allows you to put a Microsoft 365 group calendar right on your page to be visible to your readers easily.	Roll-up, Integration
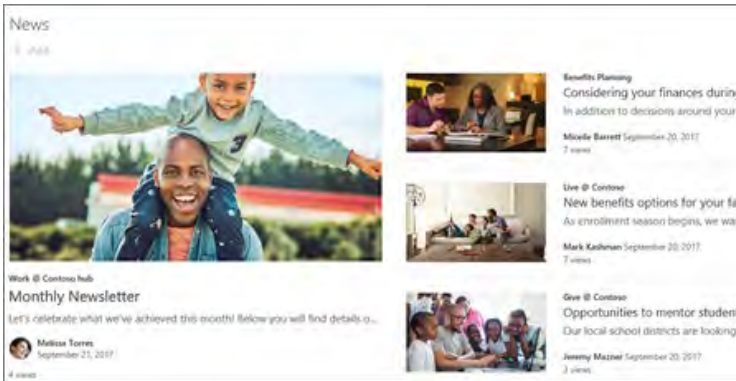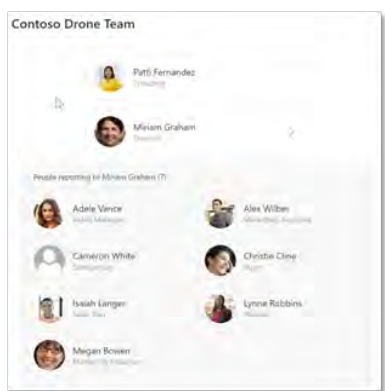
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Capability	Web Part Description	Purpose
Hero	The Hero web part allows an author to bring focus and visual interest to your page. You can display up to five items in the Hero web part and use compelling images, text, and links to draw attention to each. The Hero web part is included by default on Communication sites, but you can also add the Hero web part to other pages. 	Navigation, Reference
Highlighted Content	Use this web part to dynamically display content based on content type, filtering, or a search string. You can also set the search scope to a site or site collection and sort the results. This is one of the most powerful controls provided today in the modern experience. 	Roll-up
Highlights	Use this if it is the only Yammer web part available to you (Yammer conversations is typically best), or to provide a quick overview of active conversations and a targeted portal	Roll-up, Integration

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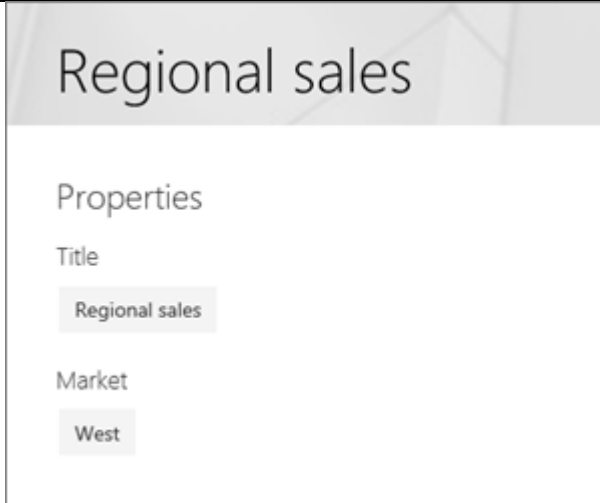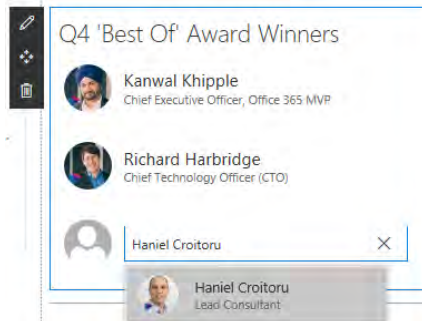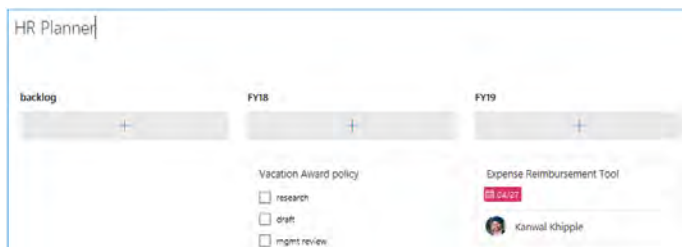
Capability	Web Part Description	Purpose
	to specific groups or conversations in Yammer.	
Image	Use this to insert an image on the page, either from your site or your hard drive. This can also allow authors to put the text as an overlay over an image.	Reference
Image Gallery	Use the Image gallery web part to share collections of pictures on a page. Simply select your images with the file picker or drag them onto the web part. Once you've created your collection, you can drag and drop the images to reorder them as needed.	Roll-up
Kindle Instant Preview	Have a book you want to recommend or promote on your page? You can share a preview of a Kindle book using the Kindle instant preview web part.	Reference
Link	Use the Link web part to add a link to an internal or external page, video, image, or document.	Reference, Navigation
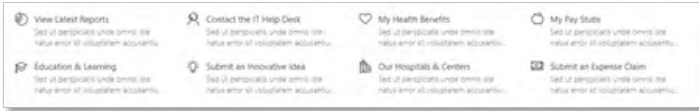
Capability	Web Part Description	Purpose
List	The List web part allows you to display a list and customize it with your title, view, and even size. Users can view the list or go to the complete list by clicking See all. 	Roll-up
List Properties	The List properties web part allows you to connect to a list web part on the same page and display the list's specific properties dynamically. 	Reference, Roll-up
Markdown	The Markdown web part allows you to add text to your page and format it using Markdown language.	Reference, Layout

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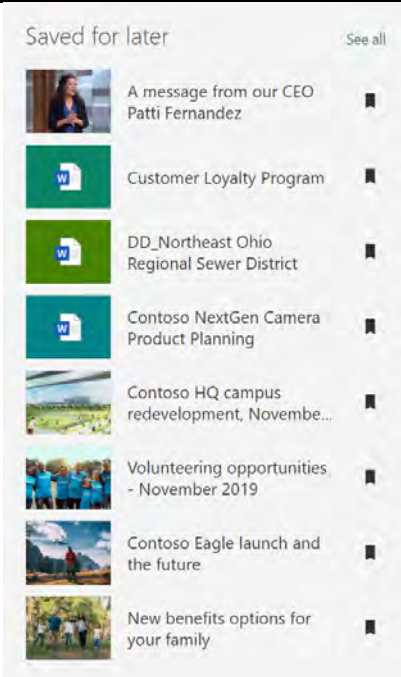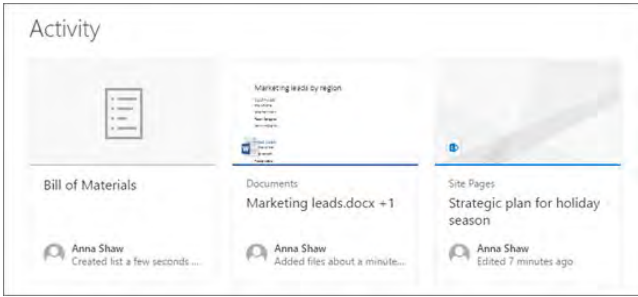
Capability	Web Part Description	Purpose
Microsoft Forms	Use the Microsoft Forms web part to create surveys, quizzes, and polls on a page. You can also collect responses to your forms and/or show your form results.	Integration, Reference
Microsoft PowerApps (Preview)	PowerApps is a service that lets you build business apps that run in a browser or on a phone or tablet, with no coding experience required. Once you have created or customized an app using the service, you can add it to your SharePoint page with the PowerApps web part. Just enter the app's web address or the app ID, and then resize it to fit the page.	Integration, Reference
My Feed	You can make your page or site more dynamic and relevant to individual users by adding the My feed web part. The My feed web part will show a mix of content from across Office 365, based on what's likely to be most relevant to the current user at any given time. The feed is personal to each user. Different users will see different content. See also your feed is unique to you. The users will only see documents or other content explicitly shared with them or that they have access to. These can be	Reference, Roll-up, Integration

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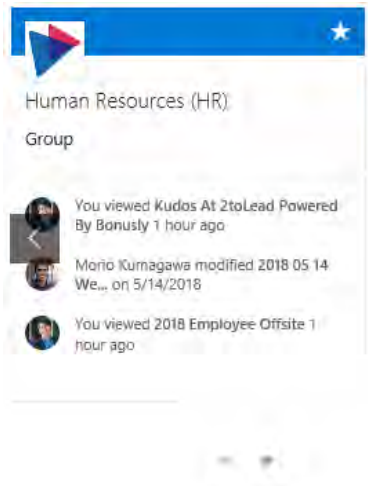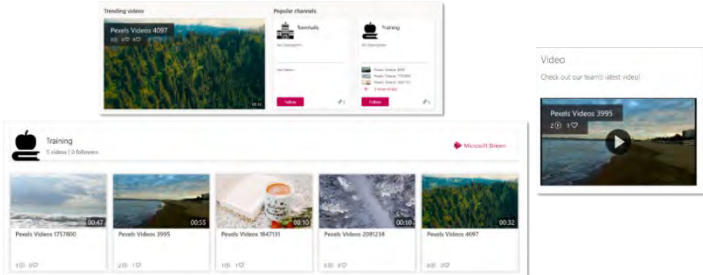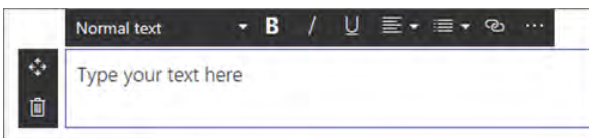
Capability	Web Part Description	Purpose
	documents stored in a shared folder in OneDrive or on a SharePoint site that they have access to or a link that someone sent them in an email conversation. The users might also see important meetings coming up shortly and can join these meetings directly from the web part. The content in the My feed web part for a given user will not change depending on what page the web part is added to. 	
News	You can keep your team in the loop as well as engage them with important or interesting stories by using the News feature on your page or site. You can quickly create eye-catching posts like announcements, people news, status	Roll-up
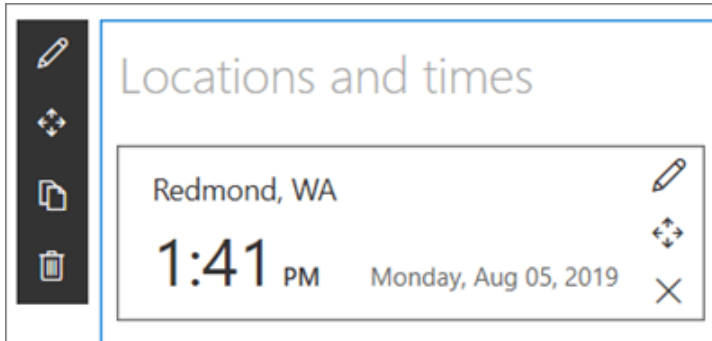
Capability	Web Part Description	Purpose
	updates, and more that can include graphics and rich formatting.	
Organization Chart	The organization chart web part answers questions like: • Which people make up a specific organization? • What are the individual roles, and how do these people interact with each other? You can show a visual hierarchy of an organization by adding an organizational chart to your page.	Reference, Integration
Page Properties	Properties are details that provide information and help describe your pages, such as title, date, content type, or custom properties that you set by adding columns to your page's library. You can add properties of your page to your page to provide users with more information.	Reference

Capability	Web Part Description	Purpose
People	The People web part allows you to display a selected group of people and their profiles on your page. It can be used for contact information, team information, presenters, and more. 	Reference
Planner	The Planner web part allows you to add your team's tasks and assignments on a page using Microsoft Planner. 	Integration, Reference
Power BI	The Power BI report web part allows you to embed an interactive Power BI report on your page easily. The	Integration, Reference

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Capability	Web Part Description	Purpose
	embedded reports are fully secure, so you can easily create secure internal portals.	
Quick Chart	Use the Quick chart web part to add simple charts to your page. Enter your data points, add labels, pick your chart type -- column or pie -- and publish.	Reference
Quick Links	Using this web part, you can "pin" items to your page for easy access. This supports an extensive icon set out of the box, which is great for getting started quickly and making the links easier to identify based on an accompanying image.	Navigation, Reference
Recent Documents	This web part displays the most recent documents accessed by the current user of the page.	Reference, Roll-Up
Saved for Later	With the Saved for later web part, each user can see the content they have saved when they view your page. Page authors can determine the source of Saved items that will show on the page: All saved items (to show all of the page viewer's items across SharePoint) or Saved items from this site (to show all of the user's saved items from the site on which the page is located).	Reference, Roll-Up

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Capability	Web Part Description	Purpose
Site Activity	This web part automatically shows recent activity on your site, such as files uploaded, edits made, lists and libraries created, and so on. Just add the web part, and the latest activity is pulled in automatically. This new capability is extremely useful for keeping teams informed as they collaborate on a site together. 	Roll-up
Sites	The Sites web part allows you to showcase sites on a page. It will automatically show sites associated with a hub site, or if you are not using a hub site, you can select specific sites to show by searching for them or choosing from recent or frequently used sites.	Navigation, Roll-up, Reference

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Capability	Web Part Description	Purpose
	This does not just provide a quick link to targeted sites; it also presents the most recent user updates and views under each site card.	
Spacer	This web part allows you to control vertical space on your page.	Layout
Stream	This web part allows you to display a video right on your page from your organization's Microsoft Stream video portal.	Reference
Text	Use the Text web part to add paragraphs and tables to your page. Formatting options like styles, bullets, indentations, highlighting, and links are available. When a user clicks the "…" additional options such as table creation, indenting, highlighting, and more.	Reference, Layout

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Capability	Web Part Description	Purpose
Twitter	With the Twitter web part, you can show tweets relevant to you or your audience right on your page.	Integration, Reference
Weather	Site owners and members will now be able to show the current weather on their site home page, within subpages, and/or within a news article on team sites, communication sites, and hub sites. Simply add the web part to your page or news, add a location, and select Fahrenheit or Celsius (°F or °C). The web part pulls up-to-date information from MSN Weather. (Roadmap Reference 27740.) Las Vegas, United States ☀️ 85 °F Partly Cloudy High 92° Low 72° May 20, 2018 MSN Weather	Reference
World Clock	The World clock web part allows you to show the time in various locations around the world. Locations and times Redmond, WA 1:41 PM Monday, Aug 05, 2019	Reference
YouTube	The YouTube web part allows you to embed YouTube videos right on your page.	Reference, Integration

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Capability	Web Part Description	Purpose

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4.4. Planning Navigation

4.4.1. Navigation Elements

In Microsoft 365, Intranets act as a portal to many key areas of interest within the business. The navigation should be personalized and dynamic for the Intranet to improve relevancy and usage.

In SharePoint Online, you can create a navigation experience with global navigation, hub navigation, site navigation, local site navigation, and then links on the page(s) themselves.
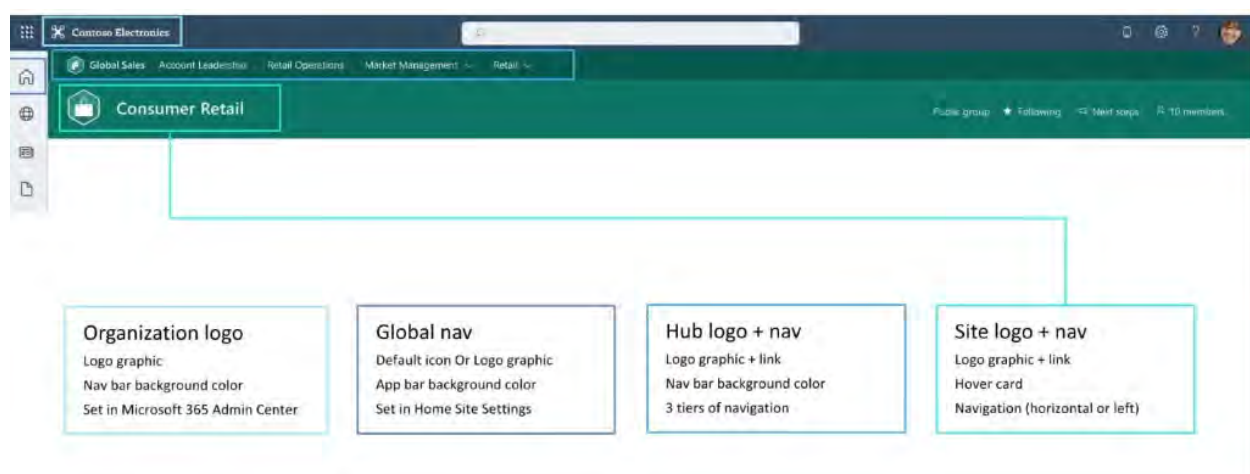
The global navigation is limited to the Microsoft 365 App Bar - which will roll out in 2021. This navigation provides dynamic navigation like favorite sites or recent sites while providing a managed navigation experience that the organization can define (limited in real estate/navigation depth and the number of links). This supports up to 3 levels, is based on the SharePoint home site, and supports audience targeting (as the other navigations do).
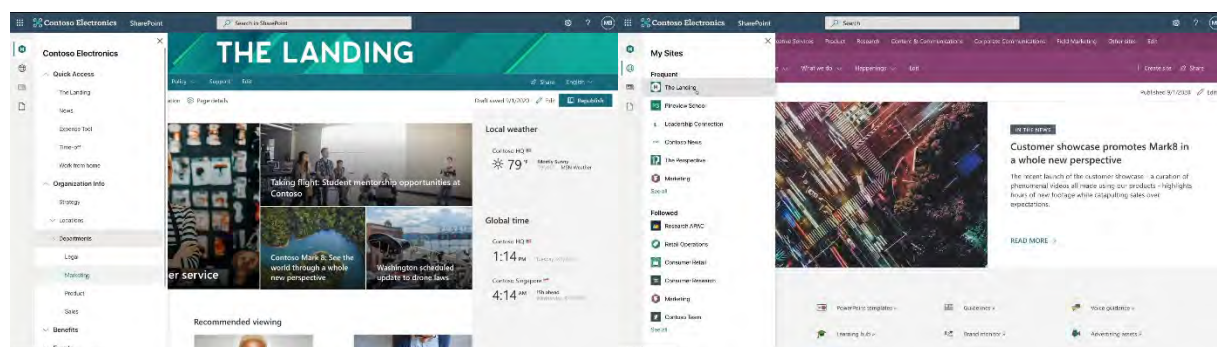
One of the advantages of SharePoint Online is that you can also create hub sites. These hub sites can have a 'hub navigation' which can be shared across site collections. This hub

navigation can also be structured or managed term set based. This hub navigation can be an excellent solution for large business units that need to control their own 'global' navigation while complimenting the left-aligned organizational nav.
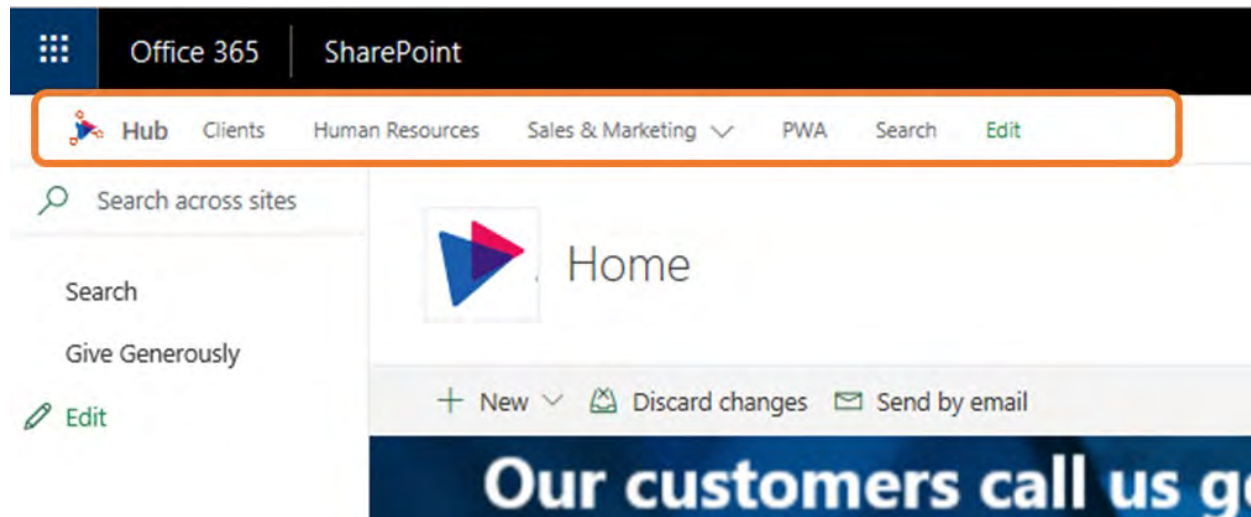
While the global or top navigation is often the main discussion point for an Intranet, often sub menus and navigation components will exist (such as tools or apps). Be careful not to develop some navigation capabilities that Microsoft 365 already provides out of the box.

Office365 Suite
- Shared across O365 suite
- Logo graphic (organizational)
- Link to organizational 'home'
- Suite header background color
- Set in O365 Admin Centre

Hub Navigation
a.k.a. 'Intranet Navigation'
- Shared across hub
- Logo graphic (hub)
- Link to hub home
- Background color
- Set in Change the Look

Site Navigation
a.k.a. 'Current Navigation'
- Shared across site
- Logo graphic (site)
- Link to site home
- Background color
- Set in Change the Look

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4.4.2. Incorporate the App Launcher
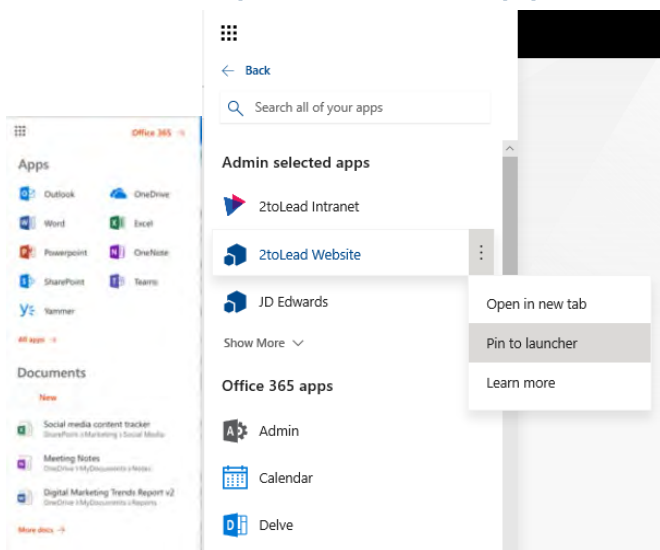
There are standard components built into Intranets. One such component is to create a bunch of tool links for typical applications users need to access. This makes it easier for users to find the relevant sites, apps, and resources to do their job. While there are still situations where it may be necessary to have a custom component or roll-up of tool links, it bears careful consideration in Microsoft 365. Consider how some of these needs can be potentially met using the Microsoft 365 app launcher. The app launcher (unlike a tools/links component on the Intranet) is available throughout Microsoft 365. Whether the user is viewing another user profile or reading an email in Outlook Online, it is always one click away for the user.

The app launcher contains links for apps that have been promoted or pinned from the My Apps Page. The My Apps page includes all the apps you get with Microsoft 365 as well as custom apps that you add from the SharePoint Store or Azure AD. Each user can personalize this app launcher by selecting what is pinned within the app launcher.

The app launcher can be used to provide users with access to key suite capabilities in Microsoft 365. Still, it can also be set up to include access to 3rd party SaaS solutions or key applications that Azure AD has been set up to provide single sign-on access.

Lastly, administrators can create custom app links that users can pin to their app launchers. These custom tiles can point to SharePoint sites, external sites, legacy apps, and more. In our example, 2toLead's Intranet app link is used to access our organization's Intranet.

This experience may not be what you are looking for when it comes to users creating their links or the format and style you want users to have for navigating across tools and apps in your

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digital workplace. This feature gap in the ability to tailor or extend this launcher today is one of the main reasons you may still need a custom tools/links/apps component in your Intranet.

4.4.3. Incorporate the SharePoint Homepage
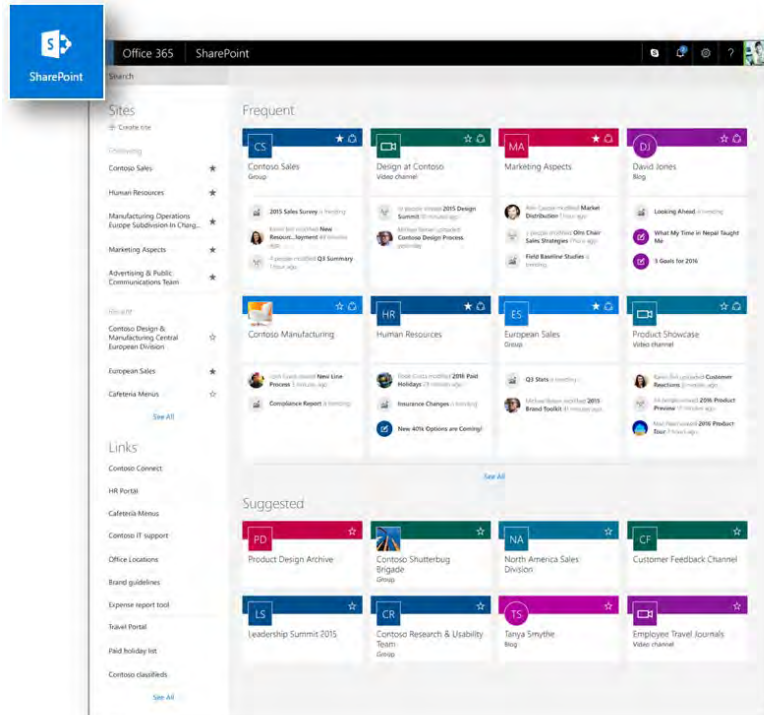
The new SharePoint home creates a space for SharePoint on the web within Microsoft 365 that allows you to find and create sites quickly. And just like the SharePoint mobile app, the SharePoint home web experience enables you to easily find and discover the places, information, and people you need to be productive.

Users simply click the **SharePoint** tile from the Microsoft 365 app launcher to launch a redesigned, modern and responsive user experience with intelligence and site activities front and center.

Once in your SharePoint home, you'll see the sites and portals you are most active in alongside recommended sites per the Microsoft Graph and company-wide sites promoted by your company, the entire intranet of an organization.

This gives you unified access to all of your sites—online and on-premises—and lets you navigate seamlessly through your intranet, as well as catch up with activity across your sites with just a glance.

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The most important thing to understand with the SharePoint page is how this will work with any Intranet site directory or site listing you may have been considering building. Since this is continually updated with new features, it makes sense to integrate and leverage this to support site navigation throughout the Intranet and broader digital workplace.

4.4.4. Custom Navigation

Many organizations still feel that navigation is an area that merits customization. Some of the design imperatives we consider when building a custom navigation experience include:

- Drive a consistent experience by offering a persistent navigation experience
- Showcase brand identity by leveraging a consistent theme
- Enable relevancy by providing choice and personalization to end-users
- Reduce barriers for remote work by offering mobile-ready means to navigate
- Drive inclusion and comprehension by providing a multilingual experience
- Facilitate findability by allowing users to switch between portals easily

4.4.5. Using Managed Term-Driven Navigation

In some scenarios, you may wish to design your navigation to be driven by terms or topics rather than by your site's structure. The managed navigation feature allows you to keep up with changes and trends in your organization and provide excellent navigation around important business concepts, all without changing your site's structure.
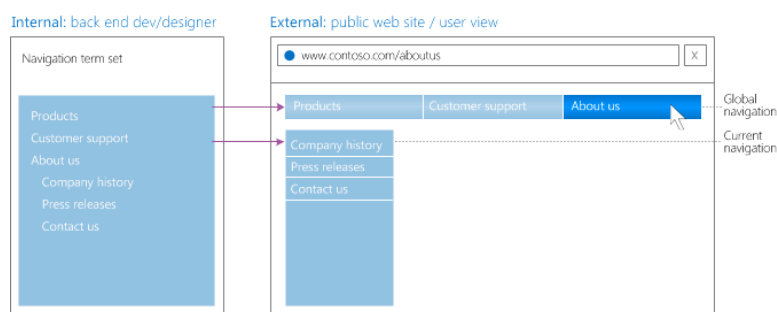
Managed navigation lets you define and maintain your site navigation by using term sets. With managed navigation, it's not your content's location that defines where in the navigation your content will appear, but how you tag your content with terms from a term set. For example, in previous versions of SharePoint, if you wanted to add a new page under "About our company," you had to add that page under the "About our company" branch within your content. With managed navigation, you can add a page to the branch that makes the most sense. By tagging

that page with a term and using Search Web Parts, it will appear in the correct place in the navigation.

You still have to organize content in SharePoint in the same way we have for years - based on site structures. However, with metadata-driven navigation, you, in essence, can create a layer that sits on top of the site structure that enables users to go directly to content or content categories that would have been buried deep in the site structure.

Lastly, managed navigation creates friendly URLs. In previous versions of SharePoint, a page's URL contained a reference to the Pages library and any folders within that library, for example, http://www.contoso.com/pages/products/cameras/camera-accessories.aspx. With managed navigation, URLs are based on the terms in the term set that drives your site navigation, for instance, http://www.contoso.com/cameras/camera-accessories. These friendly URLs are much easier for users to recognize and remember.

4.4.6. Search-Based Navigation (Custom)
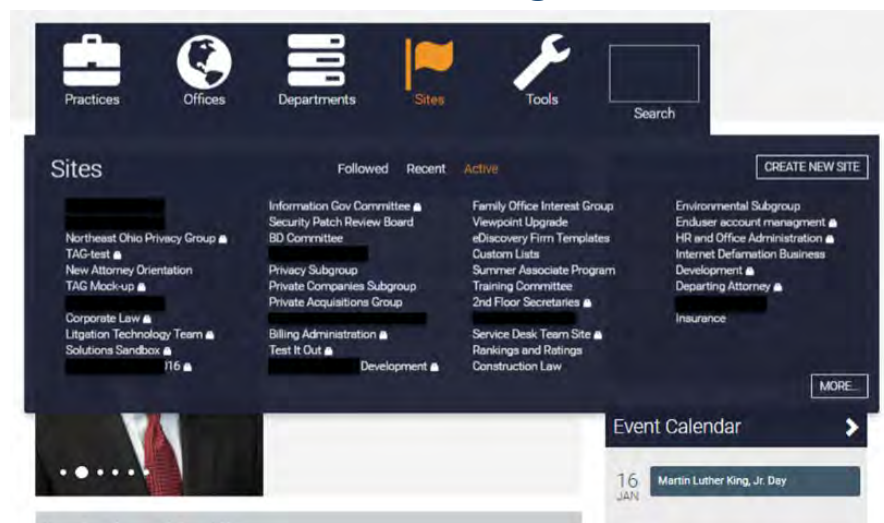
One pattern we have found that can work well is developing a custom navigation powered by search. Suppose your navigation items often do not need to appear immediately. In that case, this approach could enable the flexibility of navigation that is always growing, can be easily personalized, and enhanced in various ways to improve the user experience. Since Microsoft 365 is always crawling new content, the only downside is the potential delay of content or navigation items displaying upon creation or modification. Awaiting re-indexing can be immediate or can take quite a few minutes - with highs of hours depending on the tenant usage patterns at play.

Since many Intranets customize their global or top navigation by enabling it to function like a multi-mega drop-down menu empowering this experience with search requires less effort. While common navigation elements like locations/offices, divisions, departments, and others rarely change, some navigation elements may frequently change like tools or sites. Since sites themselves can be across the broader organization, it may be important to provide things like recent sites, favorite sites, or other ways to navigate site structures.

4.4.7. Modern & Classic Navigation
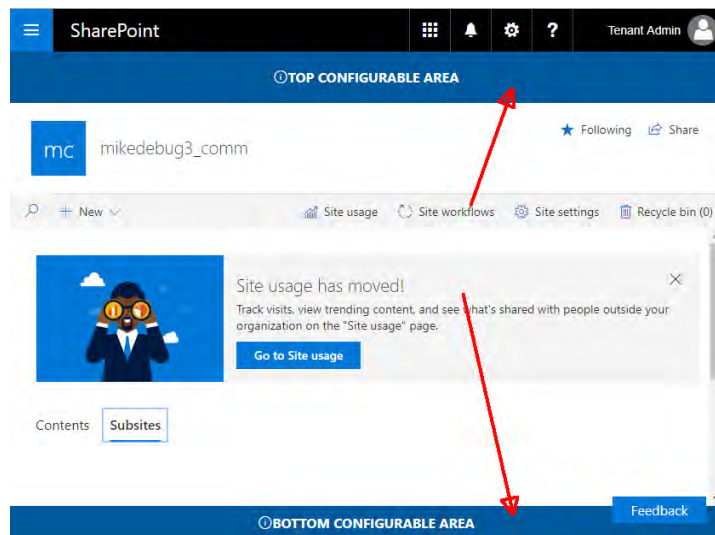
While Modern sites have a navigation menu via hub sites that gives you the ability to create a navigation that can be used across site collections, it has some limitations. It doesn't work across your classic sites today, if you have more than one hub site, you can't have consistent navigation across those sites as easily, and the OOTB navigation control is also quite simple. It doesn't support mega menus, search-based navigation, or content roll up into the navigation itself, which are all patterns used in many intranets today to improve navigation.

For most organizations investing in a custom global navigation that goes across your entire environment can be extremely useful. When you create a custom global navigation menu, you should base it on client-side/JavaScript code and implement it within SharePoint modern sites' top configurable area. This can then be used in classic sites (since it's just code you can add) so that you have a consistent global navigation experience across all sites (classic and modern).

This should use a subtle and small initial layout to use less of the modern pages' real estate as it will push the content of the page downwards.

4.5. Sites, Communities & Information Architecture

A community is not intended as a technical concept. A community is simply a group of individuals (a team) united by a common purpose or who are passionate about a topic.

Whether it be in the context of collaboration or Intranet, we need 'spaces' for each of these communities to communicate and engage with the broader corporation.

We can use the following criteria to guide us:

- Does the community have content (today) to communicate to the corporation?
- Does the community generate the content it is surfacing?
- Does the community have owners and authors to create content?

Defining these communities is often the first key to success when planning your Microsoft 365 Intranet. If it is easier, think of them as 'types' of communities and build from there.

Type	Purpose/Description	Example(s)
Intranet Home	• Landing page of your intranet (Root site)	• Intranet Home
Department	• Organizational or function-based	• Accounting • Information Technology • Human Resources
Others	• Social committees • Cross-functional teams • Project-based teams • Regions/Sites • Lines of Business/Disciplines • etc.	• Social Committee • Green Team • SharePoint Champions • Asia Pacific Region • Litigation

If your organization is just getting started, consider defining communities based on the content that is created and based on ownership. For example, HR content gets created on the HR site. This approach can often simplify the permission model and complexity for your initial release/launch. In later phases, you can layer more consumption-focused spaces (e.g., document center) instead of 'creation focused' like the HR one mentioned above.

Communities are then implemented (often) as sites. It can sometimes be helpful to think about sites as two 'types' of sites.

1. Stand-alone sites

- Sites that serve a unique purpose (not meant to be templates)
- Act as containers to bring together related content

2. Templated sites

- Sites with 'siblings' that should share common components and user experience
- Act as reusable templates to support organizational growth or changes

Microsoft 365 supports robust templating capabilities that are further enriched in 2021. These enable organizations to define their own templates or leverage Microsoft built-in templates (though we recommend establishing your own).
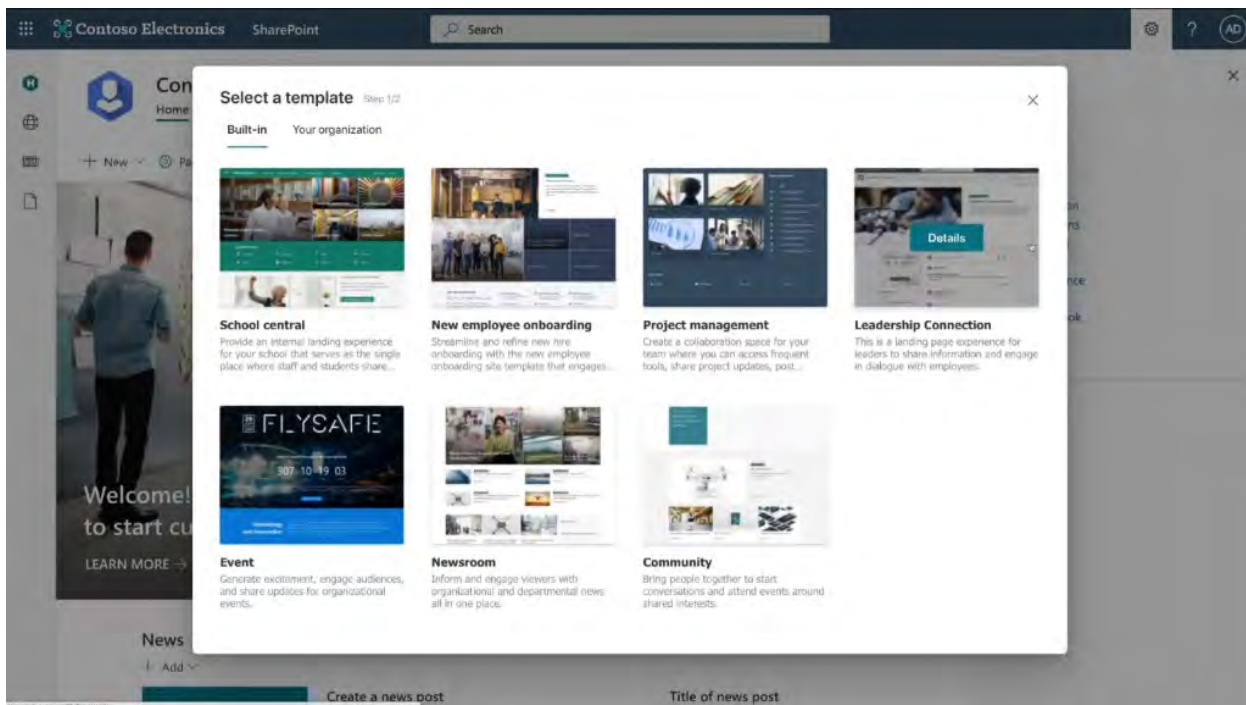
The process for creating sites from these templates can be quite intuitive and is mainly triggered from the hub site.
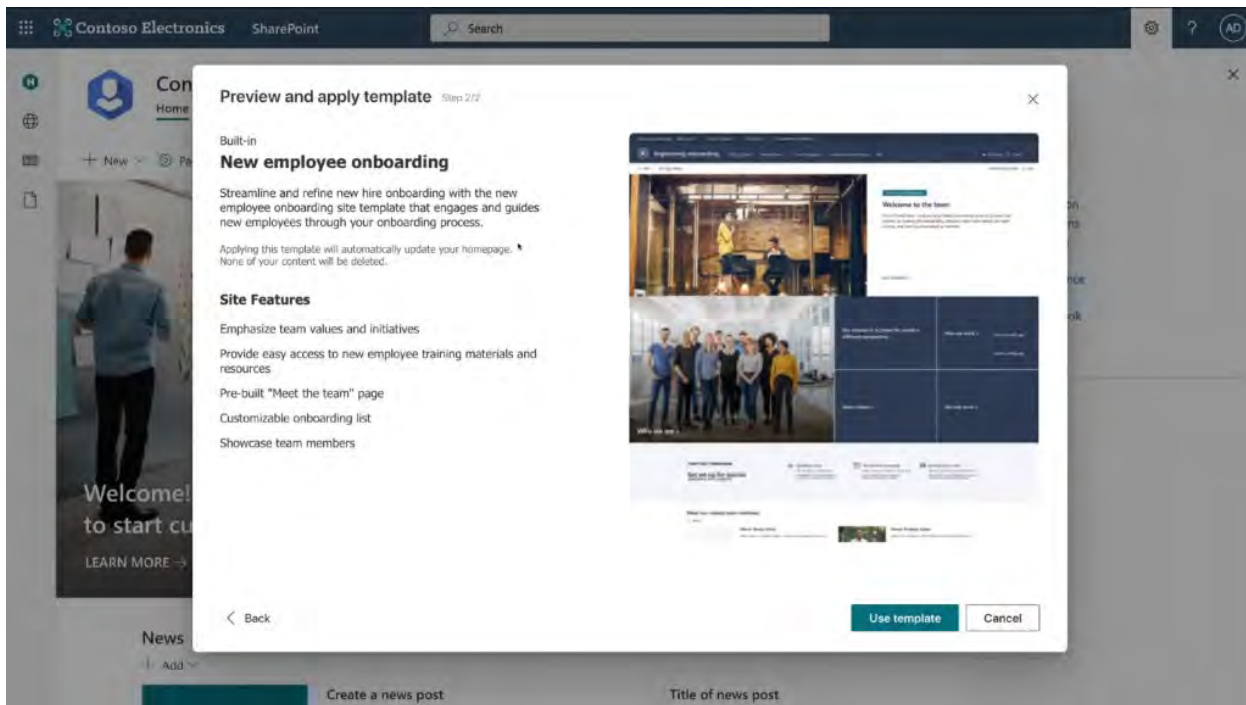
These sites are created in a flat structure and associated with a hub site when appropriate. This is different than the subsite or hierarchal model we have used in the past and is a much more resilient, agile approach that scales better.
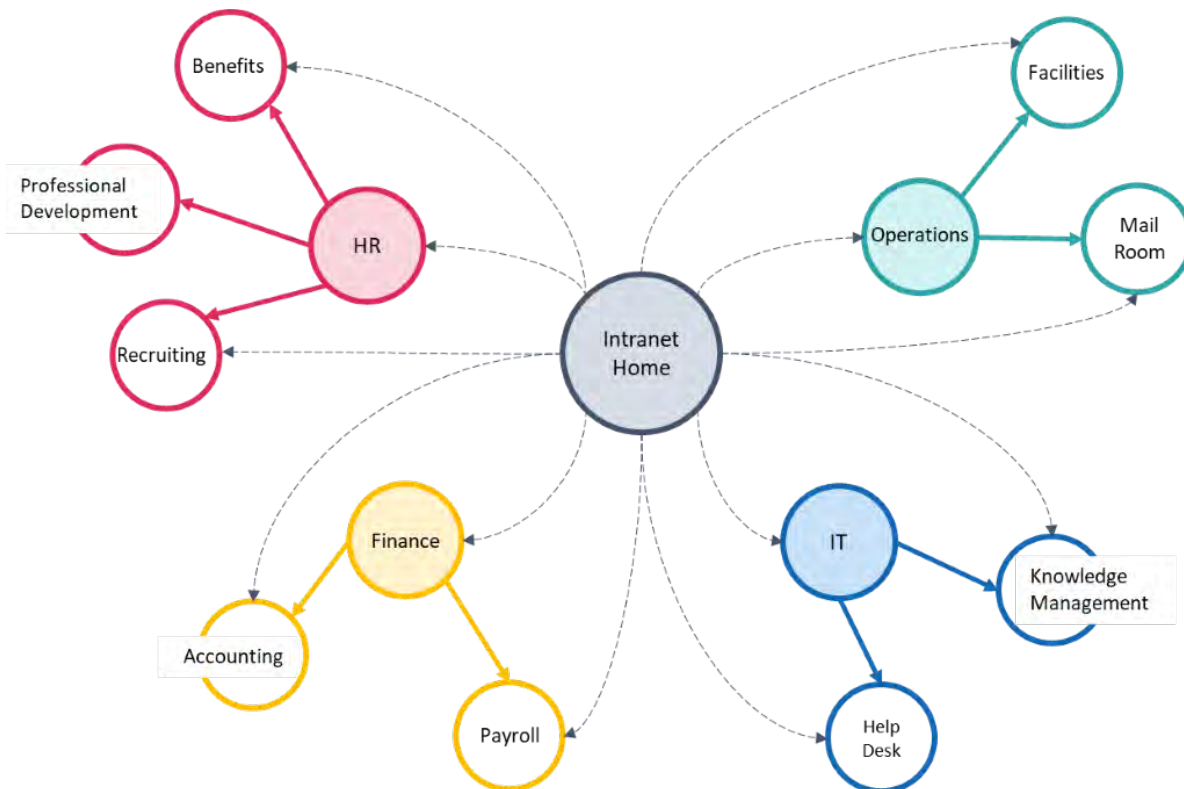
4.5.1. Incorporating Metadata Into Our Intranet Information Architecture

Metadata is simply information about information (or data about data). It gives us a way to classify, categorize and label our content.
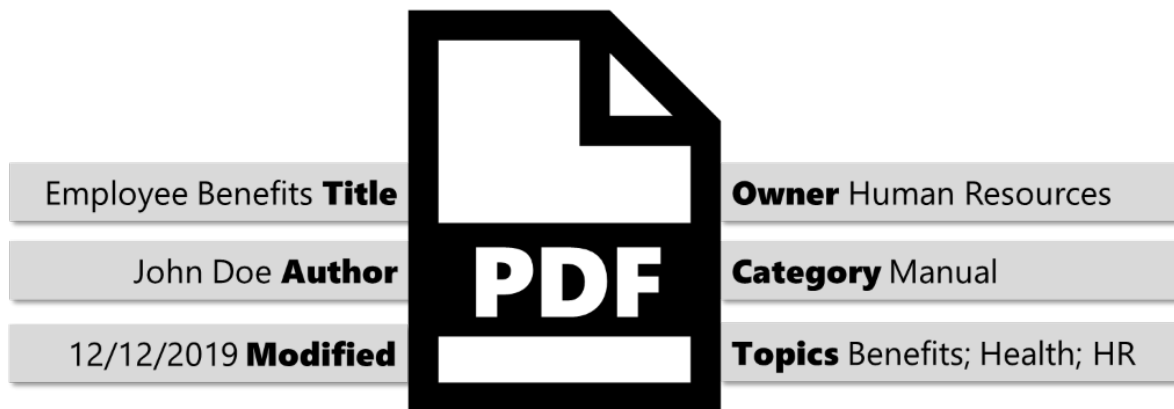
Some metadata is captured by default by the system. These include:

- ID
- File Name
- File Type
- File Size
- Version
- Modified By
- Created By
- Modified Date
- Created Date
  etc.

This metadata can then be leveraged to logically separate content, help search engines and users find more accurate results, and allows us to be more flexible in storing our content. It also enables a level of consistency and control over how our content is labeled and vital to broader information management, protection, and life cycle strategy.

The key to successfully implementing a metadata or taxonomy strategy is striking the right balance between:
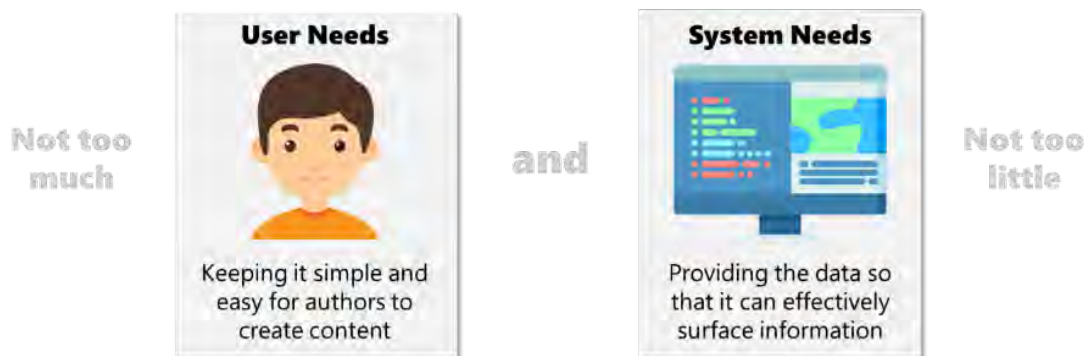
Metadata is only great if it's used. The takeaway here is to plan for metadata and apply it, whenever possible, to improve the ways content can be rolled up, protected, retained, and managed across your Intranet.

Location-Based Default Metadata

While users can sometimes define metadata, it can also be automatically attributed to content based on where they store the document or create the content. If you have a departmental HR site and add a document to that site, you might have a default rule that all HR site content is labeled "department = HR." This means that users don't need to tell the system that this is HR content. Simply by creating it or uploading/dragging and dropping content into the site, it can default to that departmental metadata value. This works for news, events, and more and isn't limited to just documents.

Uses Of Metadata

Using metadata, we can improve the relevancy of search results and provide refiner experiences if we have extended Search (see Extending Search). Allowing users to filter down or provide pre-filtered roll-up or search experiences that use that metadata to target and narrow results.

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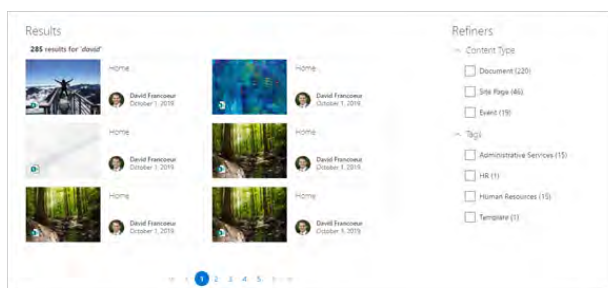
Using metadata, we can configure pre-built 'lenses' or views on information. This is something Microsoft 365 supports on pages, documents, and list items (events, tasks, issues, etc.).
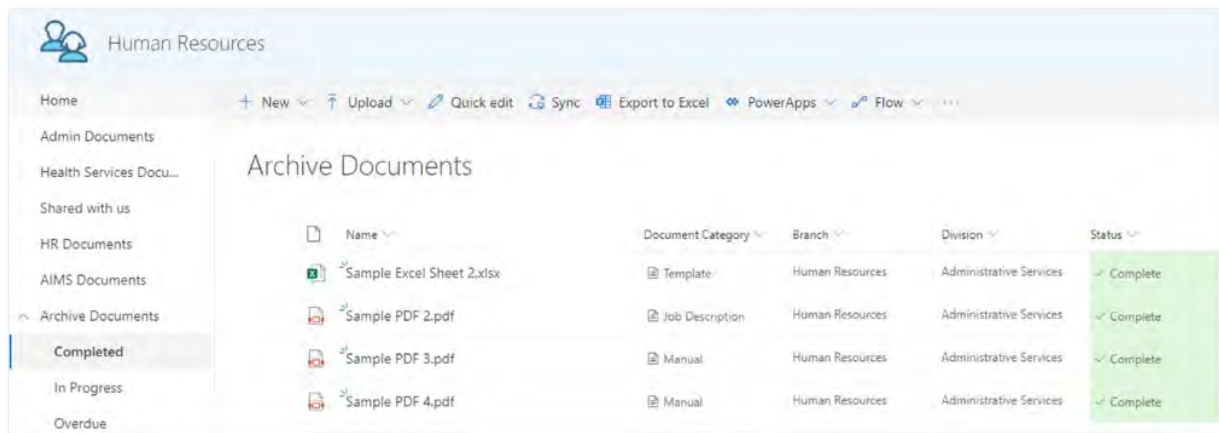
These views can filter, sort, and order the content based on this metadata.
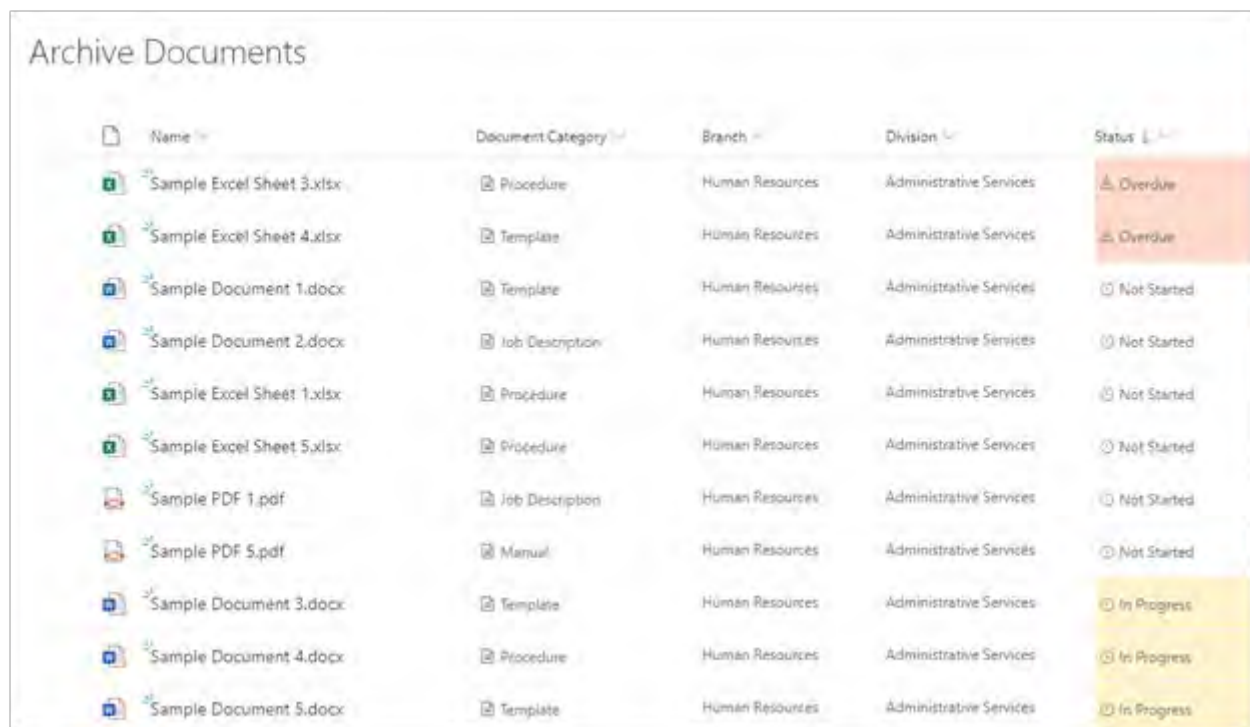
These can even be used to group content that could expose content across folders regardless of how deep down a folder hierarchy. In fact, dragging and dropping this content as an author from one category grouping to another can even update the metadata in Microsoft 365.

Users can define their views, or we as Intranet content owners can define them for our users to improve the experience of rollups or navigation around key Intranet assets such as policies, resources, and more.
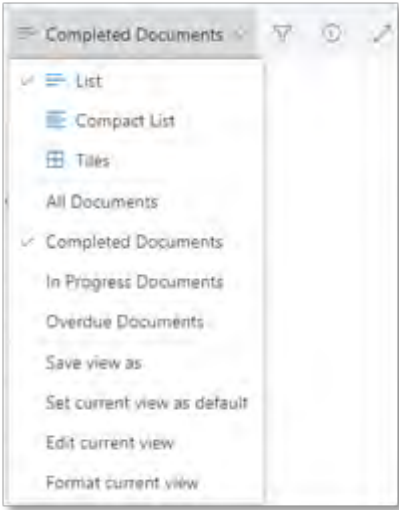
Users can also update metadata for targeted scenarios where defaulting or automating the application of metadata may not be as reliable. This should only be used for scenarios where the value of tagging this metadata is clear to the author performing this mapping.
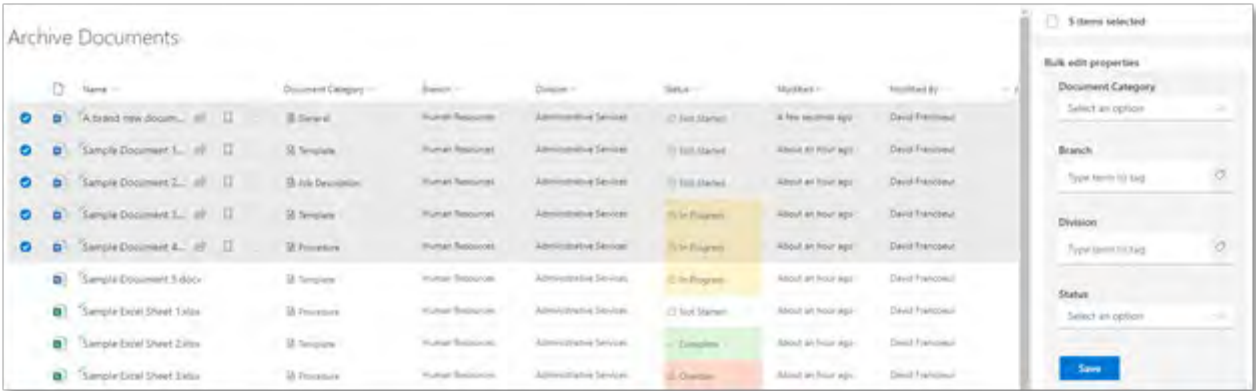
Some initial types of content you might start with could be operational documents where regions or offices are 'tagged,' project documents, policies, and procedures.

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4.6. Site Provisioning & Managing Intranet Sites

Often there is a need for users to quickly and rapidly build new sites. This presents a significant governance risk, however, especially in collaboration scenarios outside an Intranet. Without proper oversight, the inevitable outcome of an unmanaged site provisioning scenario is debilitating site sprawl. Over time, a seemingly innocent decision can create a massive headache for administrators to determine what should be kept, what is duplicated, and who owns what from an accountability perspective. From a high level, there are three main options for site provisioning:

1. Ungoverned self-service site creation
2. Governed admin-only site creation
3. Governed self-service site creation
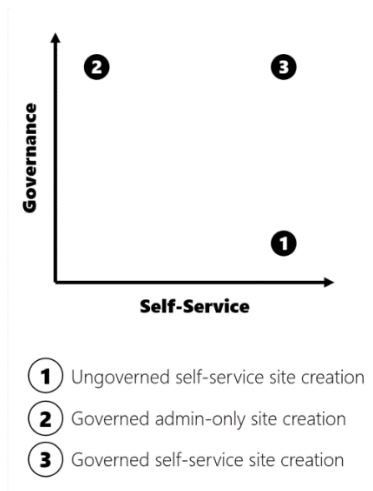
Why do we need to manage sprawl and have this request and registry/directory?

Ineffective Naming	Owners Missing	Redundant Teams/Sites	Data Loss Risks	Loss Of Control	Slower Team/Site Start	Navigation Productivity Costs	Training & Adoption Challenges
Unclear Purpose Or Workspace Focus	Orphaned Teams/Sites	Decreased User Confidence	Limited Ability To Target Labels For Information Protection	Often Unmanaged Use Of Apps (Cannot Target)	Not Tailored Or Fit To Purpose	Challenging For New Users To Ramp	When To Use What Challenges
Unclear Official vs Unofficial	Unmanaged Teams/Sites	Inconsistent Workspaces	Limited Ability To Determine Risk	Unmanaged Integration	Inconsistent Design/Layout Leads To Relearning	Hard To Find Workspaces	No Consistency Makes It Harder To Train
Cannot Differentiate At A Glance	Sponsor vs Owner Challenge	Increased Operational Load	Limited Ability To Pro-actively Mitigate Risks	Limited Ability To Target Labels For Retention	Hesitation To Optimize Created Spaces	Uncertain Who Owns A Workspace	Unmanaged Workspaces Cannot Be Targeted With Guidance
Inappropriate Name Usage	Private Channels (Don't Require Owner)	Increased Costs To Support	Limited Permission Review & Increased Chances Of Over Sharing	No Clear Escalation If Owner Missing Or Unresponsive	Technically Challenging	Reliance On Others To Link	Difficulty Identifying Champions & Pro-actively Targeting Champions

There are many reasons outlined above for why it's critical to get ahead and establish your process.

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In terms of how sites are provisioned, there are several options, including:

SPFx Solutions	Custom Sites	Azure Functions
Logic Apps	WebJobs	PnP Provisioning Engine
SharePoint Site Designs	Teams Templates	Power Apps
Power Automate	Microsoft Lists	SharePoint Lists
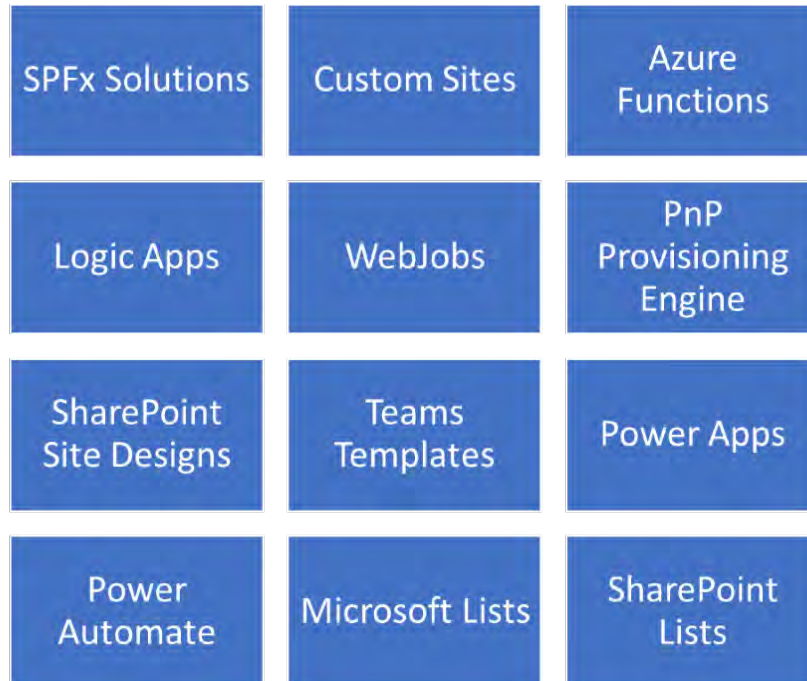
Each of these capabilities can be leveraged in a solution to meet the needs of an effective request and provisioning engine for Microsoft Teams, SharePoint, Yammer, and more.

4.6.1. Manual Approach

You can still provision sites using the manual approach in Microsoft 365 if you really want, but be aware that your foundation of a core registry will be incomplete when you do. By using the out-of-the-box interface to provision a site, you can then apply a template your organization has established, or you can create a site directly based on an existing Microsoft template.

4.6.2. Additive Scripting For Bulk Work

You can even automate this to a limited degree by using PowerShell to accelerate your provisioning speed. However, PowerShell scripts that provision sites, configure sites, and provision appropriate site assets need to be regularly maintained.

4.6.3. Remote Provisioning

You can extend this technique by using CSOM to provision site collections.

https://github.com/OfficeDev/PnP/tree/master/Samples/Provisioning.SiteCollectionCreation

You can also use an approach where you get a template from an existing site, save the template using an XML provider, load the saved model and apply it to an existing site. Using this technique, people can update the template sites used in the provisioning process giving more control to the business.

Additionally, you can queue requests or use other advanced techniques to improve the site provisioning process.

https://github.com/OfficeDev/PnP/tree/master/Samples/Provisioning.Cloud.Async.WebJob

You may wish to leverage more advanced approaches, which is an area of continued investment from Microsoft. With the new SharePoint framework, a new site creation (site designs) experience is one of the investments Microsoft is making that may help meet some organization site provisioning needs or act as an excellent base for your custom site

4.6.4. Site Templates & Site Designs

Building on remote provisioning, you can also use site designs and site scripts to complement this approach and provision your modern SharePoint sites' custom configuration.

When people in your organization create new SharePoint sites, you often need to ensure some level of consistency. For example, you may need proper branding and theming applied to each new site. You may also have detailed site provisioning scripts, such as using the PnP provisioning engine, that need to be applied each time a new site is created. Perhaps you might also want to trigger this kind of interaction when a new site is added to a hub site by applying them to previously created modern site collections (for more information, see the REST API and PowerShell articles).

Site designs are like a template. They can be used each time a new site is created to apply a consistent set of actions. They can also be applied to existing modern sites (group-connected Team and Communication sites). Most actions typically affect the site itself, such as setting the theme or creating lists. But a site design can also include other actions, such as recording the new site URL to a blog or sending a tweet.

While site designs are inexpensive and straightforward to implement, they have several limitations.

Some of the limitations include:
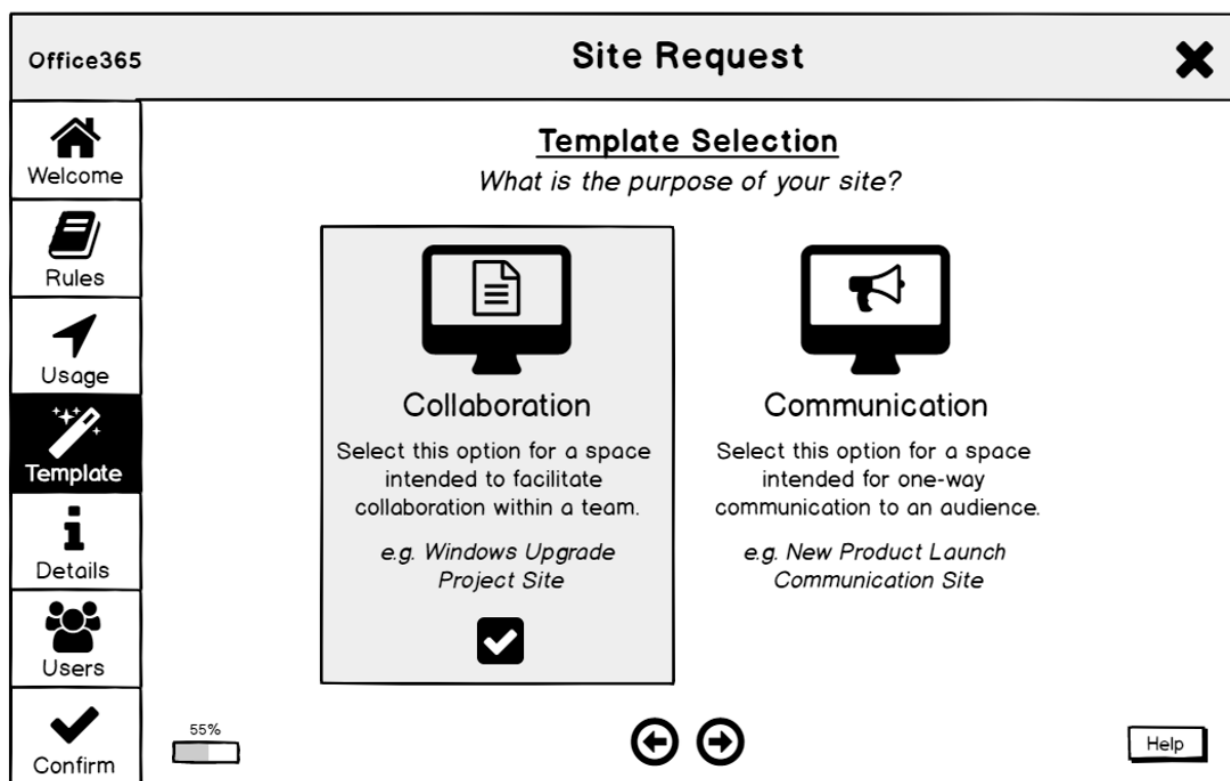
- Limits to the number of actions currently available (see Site Design JSON Schema)

- No built-in approval process
- No built-in ability to customize the interface for provisioning
- No ability to limit the creation of Communication Sites
- Users are not guided to select the right option for their needs

For a complete list of available actions and their parameters, see the JSON schema.

4.6.5. Custom Solutions

While OOTB options are maturing, we generally do not recommend customers use the out-of-the-box process and experience for building sites in the Intranet. Instead, we recommend a process where a request can be submitted, and then the site is automatically provisioned based on the request detail and/or the approvals involved. This ensures we have a scalable, repeatable process for site creation, we have a registry that can maintain quite easily, and we can more effectively manage these sites over time.

The important thing is that the request process asks questions that the Microsoft out-of-the-box experience does not ask today.

Sample Questions:

- What is the purpose or business reason for this workspace?

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- What division does this relate to?
- What department does this relate to?
- What product does this relate to?
- What customer does this relate to?
- What project does this relate to?
- Will this workspace contain highly confidential information?
- Who is the business sponsor for this workspace?
- What should the visibility of this workspace be? Should it be shown in the directory?

Why is asking a few extra questions on provisioning so important? What value does this additional metadata provide once we have it for reference? It's the foundation for so many other elements of Microsoft 365 success.
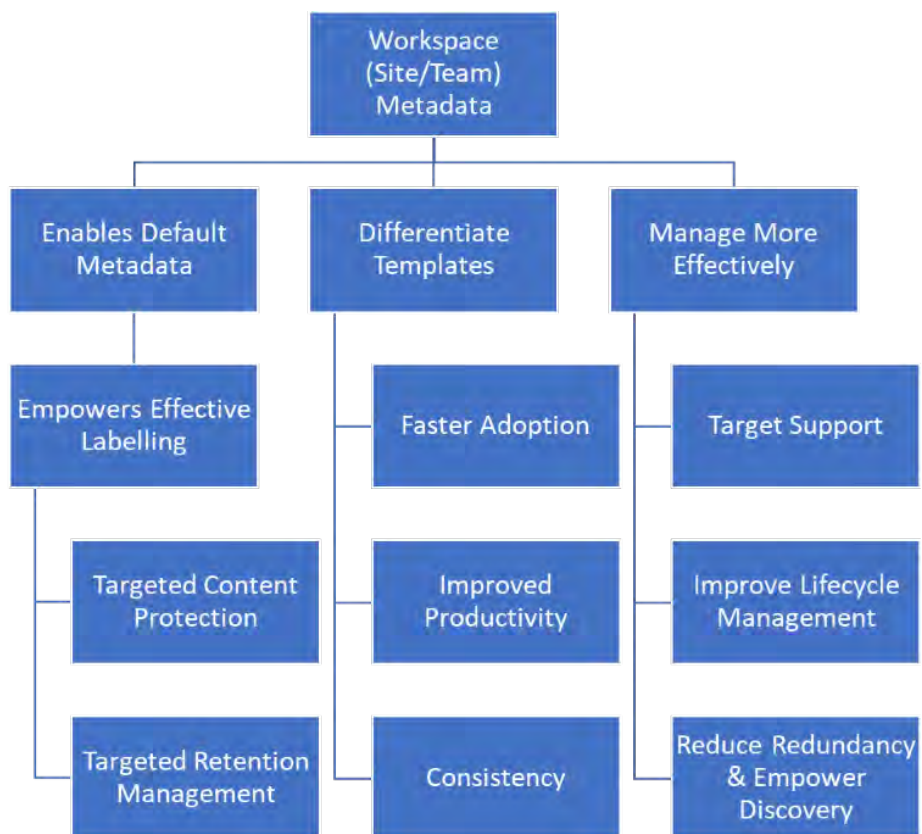
As an example, by having the registry or directory list with metadata about each site, we can more easily automate pro-active management or support processes to help teach site owners - think of a drip-email campaign - or reduce risks by asking for owners to take actions, like highlight a secondary owner who is missing.

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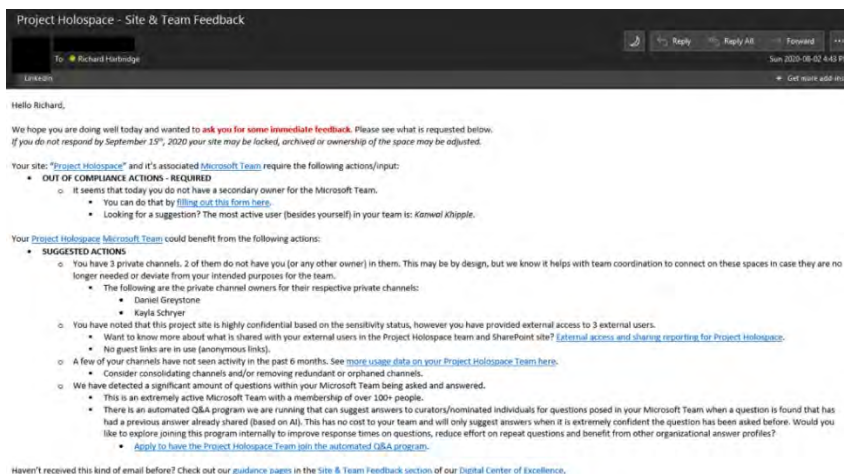
By centralizing and governing the creation of 'spaces' (groups, teams, sites, etc.), we can improve how we manage the lifecycle of these spaces.

Expiration & Archiving Policies	Duplication Detection	Reduce Risks (Owner, External Sharing, etc.)
Associate Teams & Sites To SharePoint Hubs	Provide Training Material	Improve Site / Team Owner Onboarding

4.7. Multilingual Planning

It is important to take full advantage of Microsoft 365's core multilingual capabilities first and design your Intranet with these in mind.

There are two major mechanisms by which translations can be handled.

Human-led Translation

Once content is created in the source language (original), content is manually translated by a person or a team, into one or more destination languages.

VS

Machine-led Translation

Once content is created in the source language (original), content is automatically routed to a machine translation service to be duplicated in one or more destination languages

While Microsoft offers machine translation via its Azure Cognitive Services, this is not built-in to SharePoint and is not free. Therefore, today's discussion focuses on human-led translation as we want to maximize what's available out of the box and already included first.

Plan to educate users. Make it simple for users to manage their language preferences. **To ensure the multilingual features are working as expected, it is critical users set their profile (MUI) language as soon as possible. Ensure you plan for this communication.** The easiest way to do this is via the new Microsoft 365 Home Screen.

4.7.1. Site Language

Each site collection gets assigned an immutable default language at the time it is created.

4.7.2. Page Translation

The *Multilingual Page Publishing* feature for SharePoint Communication Sites allows an administrator to designate which secondary languages to support translation.

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■

Designated translators (users or AAD groups) can be specified if you wish to generate email notifications to these individuals when a translation is requested but is otherwise not required.

■ Anyone with '<u>Edit</u>' rights or above can create or modify a translated page.

Once a draft of a page has been created in the original language, it is possible to generate translations of the page.

■ Translations get automatically created in a subfolder of the Site Pages library labeled with the language's abbreviation (e.g., FR).

■ Translations get created initially as a 'Draft,' and the usual rules here apply.

■ A translation gets created with the same filename and with all the original content and web parts intact.

■ The original page remains 'connected' to its translated counterparts via a hidden field.

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Translate into French: Our Latest Achievements

David Francoeur
Digital Workplace Consultant

How do you get started?

Select 'Edit' to start working with this basic two-column template with an emphasis on text and examples of text formatting. With your page in edit mode, select this paragraph and replace it with your own text. Then, select the Basic two-column template title and replace it, too. Type your name in the page author field under the title.

You've just edited a page template and you're on your way to making this page your own!

Use the editing toolbar.

After you select this paragraph, use the toolbar to choose styles, make other format changes, and add links. For example, this is a link to an article about the text web part.

Add a table from the text and table formatting pane. To open the pane, select the 'More' option, shown as ... in the toolbar.

Note: *That overriding (e.g., via a 3rd party content migration/management tool like ShareGate) an existing page translation with another page will break the connection.*

Once a site has the feature enabled and at least one additional language supported, the language toggle on the page becomes available. **It is important to note that the language toggle controls page content only. It is not a method to change one's user profile (MUI) language.**
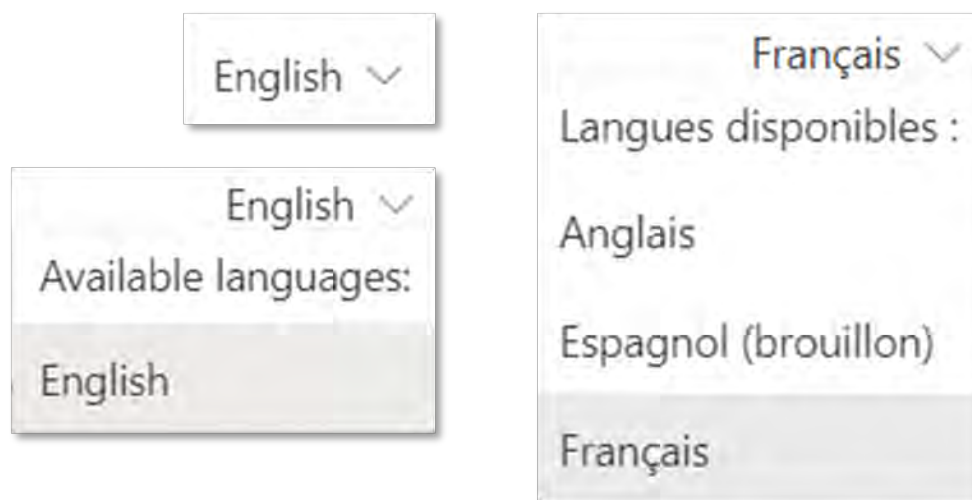
- By default, a user gets redirected to the page language that corresponds to their preferred profile language if a page in that language is available.
- A user can choose to move between the available languages of a page using the toggle.

Note: *If you are moving between languages of a site's landing page, the next time you return to this site, you will be redirected to the language you were last viewing.*

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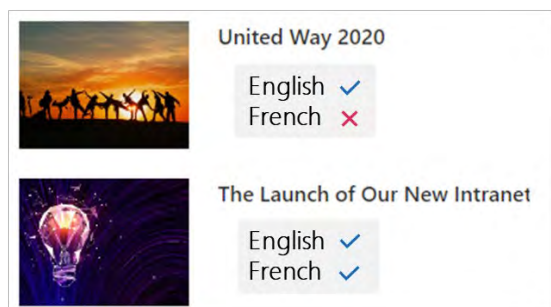
When a site landing page is available in multiple languages, some components intelligently recognize this display language and rollup content in the appropriate languages (e.g., News), but only when that content has an available translation.

4.7.3. Events

Events still lack complete multilingual support.

As modern Event Pages are not created in the same manner as News pages, they do not support multilingual in the same fashion.

While certain sections of the Event page will be translated automatically, others - most critically the *Title and Description* - do not support translation today.

This leaves using a single event containing both languages for *Title* and *Description* or using the Event Category to separate the English and French versions of the same event.

4.7.4. Web Part Content

Other typical page content such as Text, Links, People can be provided in alternate languages by translating the content in these components as part of the page translation using the Multilingual Page Publishing Feature.

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On 'Home' (English)

On 'Accueil' (French)
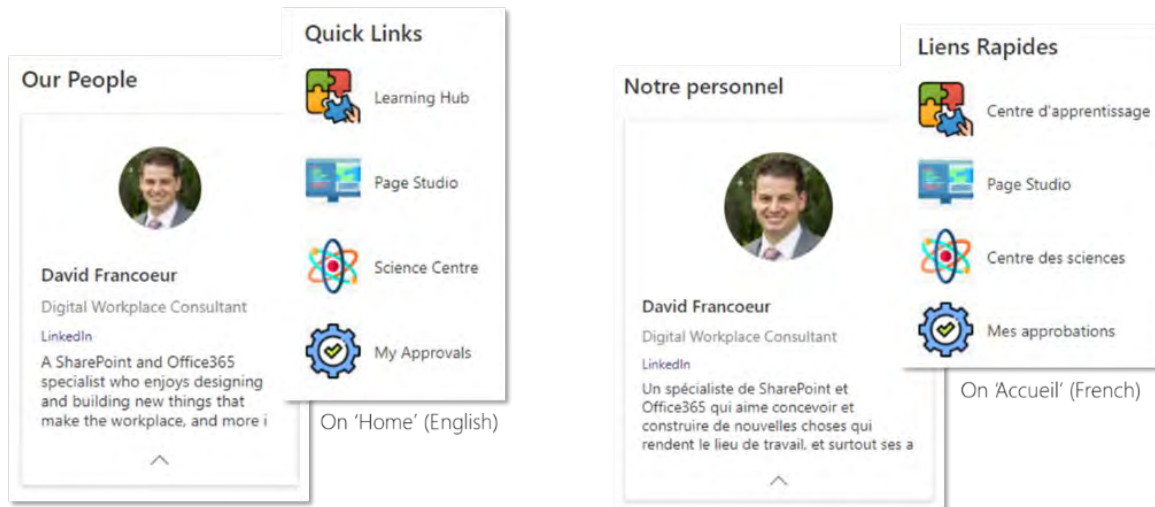
4.7.5. Documents & Metadata

There remains no dedicated multilingual feature for documents, meaning documents have no built-in mechanism to stay connected to their translated counterparts.

Libraries, folders, or metadata can be utilized to classify documents into languages.
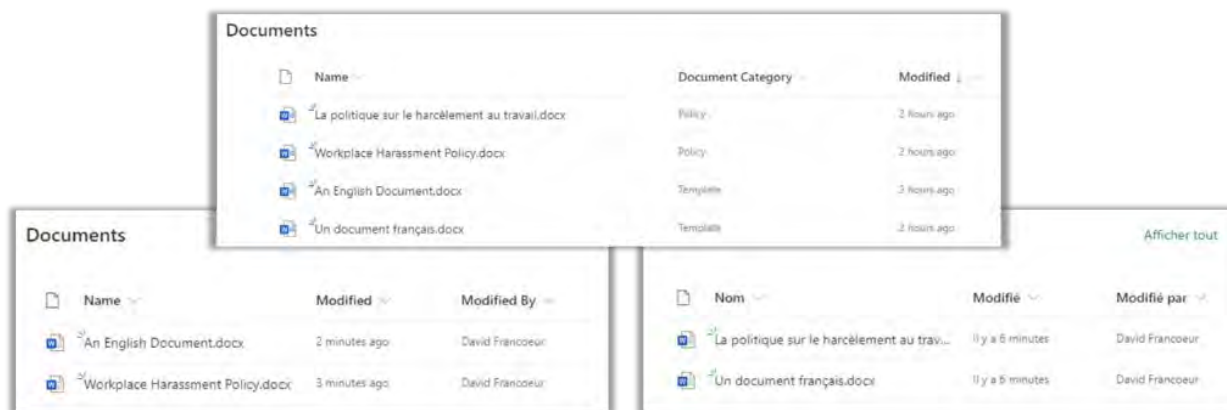
The new modern term store offers an improved experience. Although this was previously possible in the classic term store, the modern term store makes the experience more intuitive to apply translations to your metadata.

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Specify working languages for the Term Store

Specify translation for individual terms

When navigating and applying metadata, available translations are displayed to match a user's preferred profile language.

Note: *Despite the UI showing the French label to a French user, only the original label gets indexed by Search.*

Not all columns support translation. Choice columns do not currently support multilingual out of the box.

4.7.6. Other Interface Elements
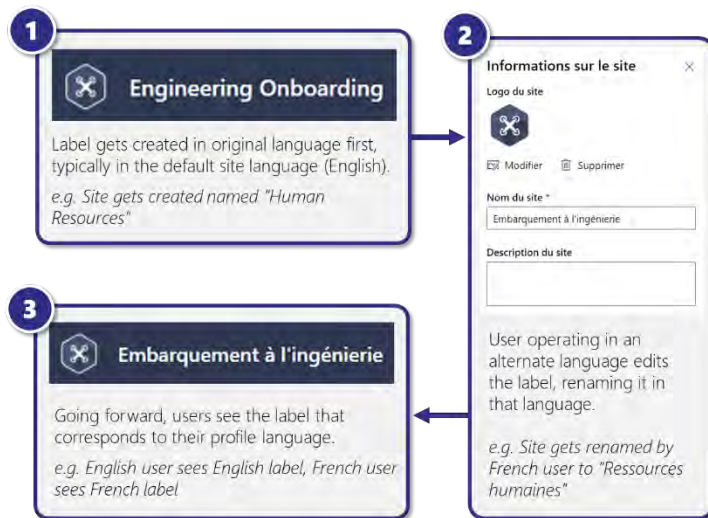
Certain elements in SharePoint Modern support translation the same way they used to in previous versions; unfortunately, the approach is less than intuitive.

- Site Title
- Site Links (Quick Launch)
- Content Types
- Columns
- Views

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4.8. Navigation

How navigation is translated is entirely dependent on the solution being leveraged.

The out of the box SharePoint navigation requires a user operating in an alternate profile language to edit the label, renaming it to the desired equivalent.
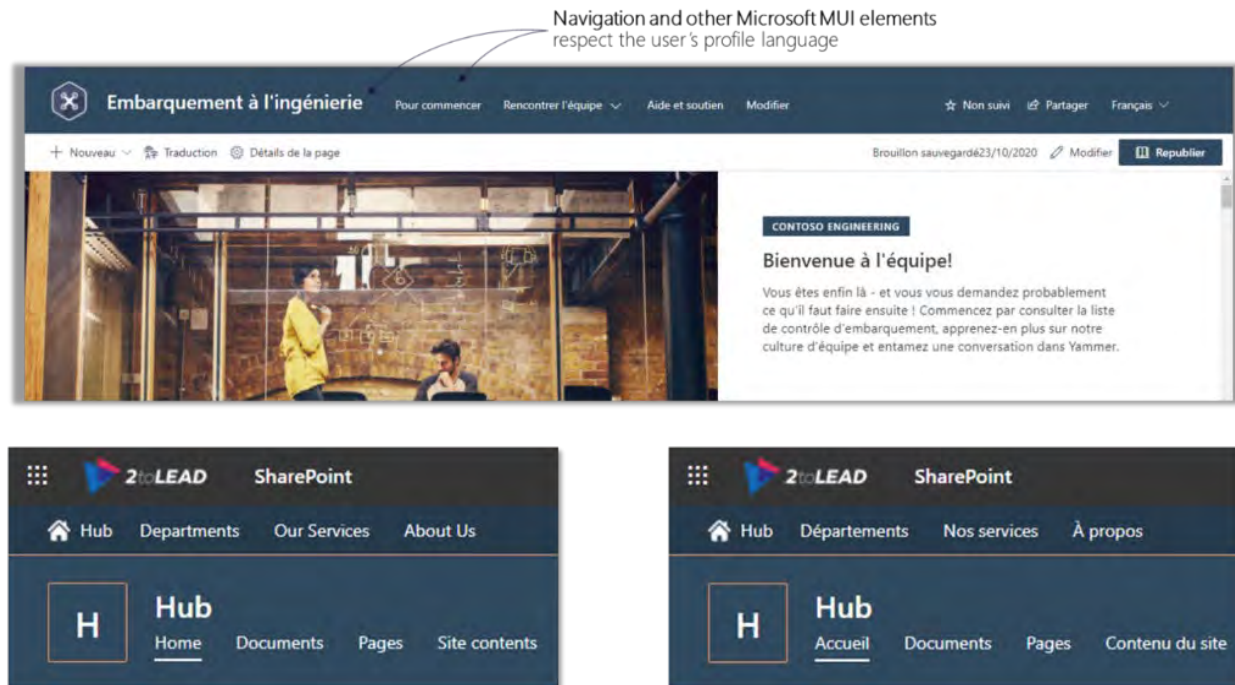
Navigating to French pages is a way to locate relevant/related French content in this model.

French content can be segregated to only display on the French translations of landing pages, and vice versa

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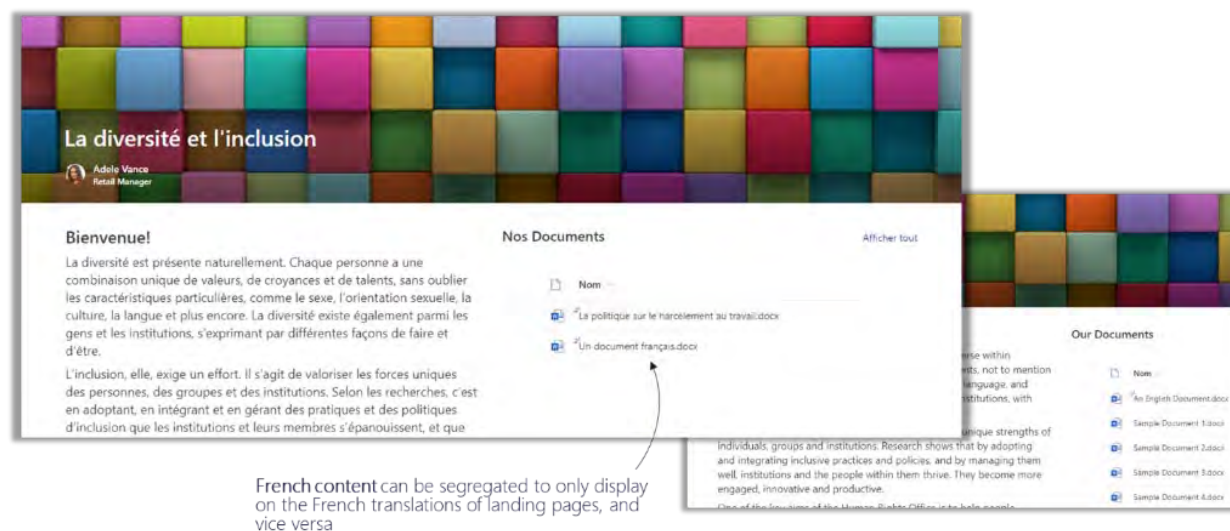
4.8.1. Going Beyond Out Of The Box

As a rule, when we develop a custom global navigation that typically leverages the Term Store, it allows us to reuse an existing multilingual solution to provide a way to navigate languages.
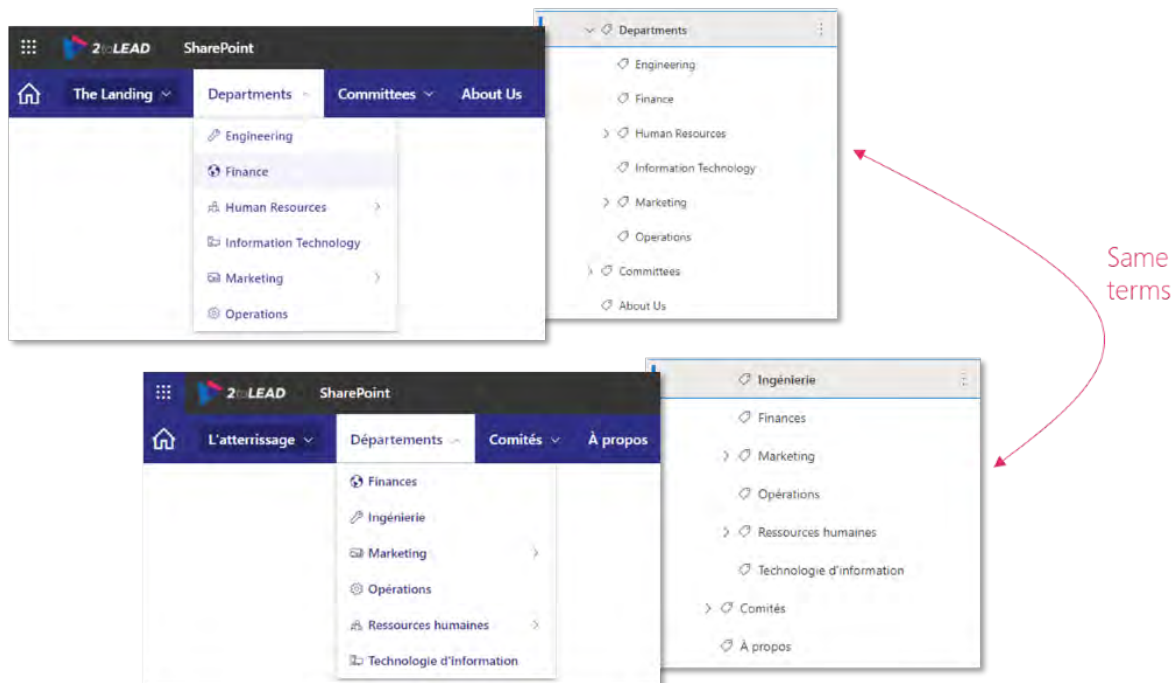
The solution looks up the current user's profile language to determine which labels to display.

4.8.2. Modern Microsoft Search

The modern search experience will retrieve content based on the search parameters, such as a keyword. It does not intelligently return content based on a user's preferred language.
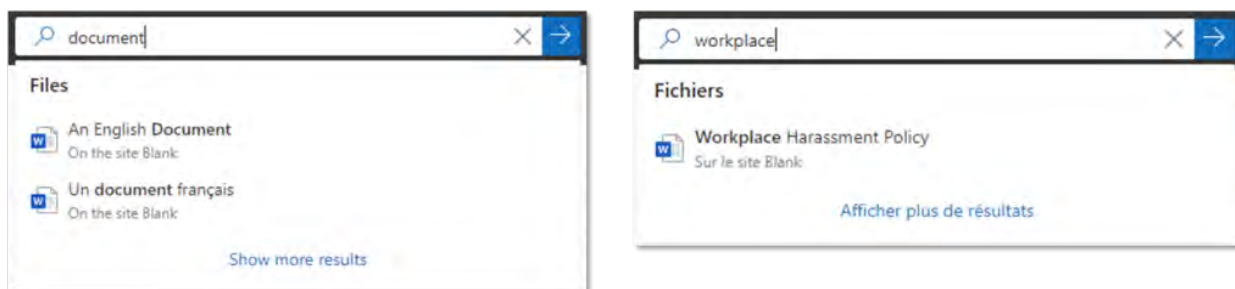
The upcoming custom search components will allow for configuring specific search result pages to meet corporate needs, which may include refining content by its language. This is now in PnP and part of Roadmap 57054.

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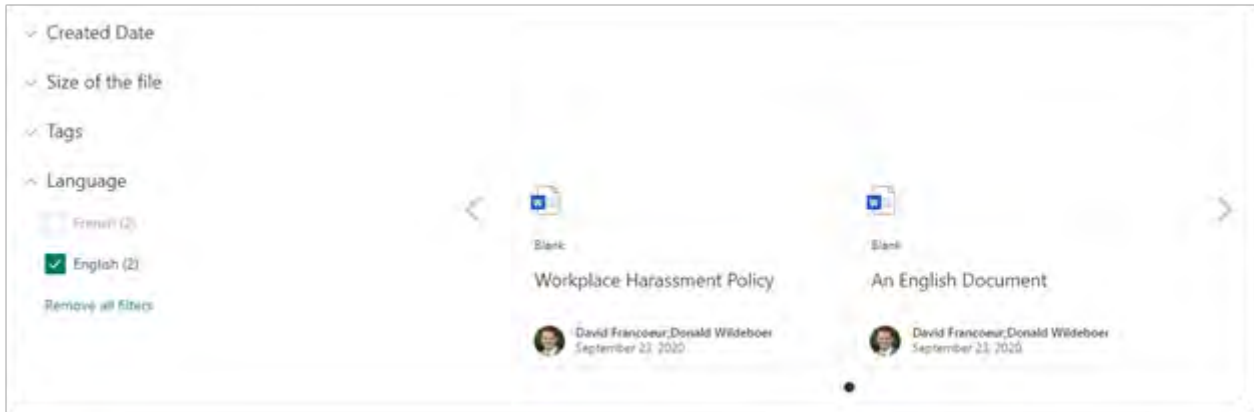
4.9. Microsoft 365 People Card & User Profile Experience

Building your Intranet on or with Microsoft 365 means that you are embracing the Microsoft 365 user profiles that Microsoft is continually improving.

What are some of the great features you get on Microsoft 365 profile pages today?

- The profile contains the rich fields you may already be familiar with if you have built or used an Intranet based on SharePoint.
- You can add your custom attributes from AD or AAD.
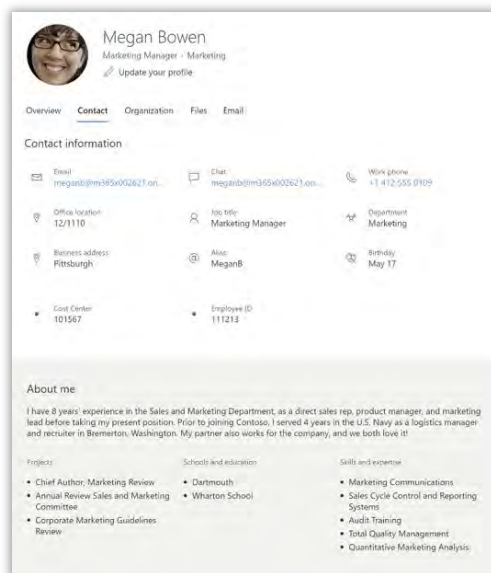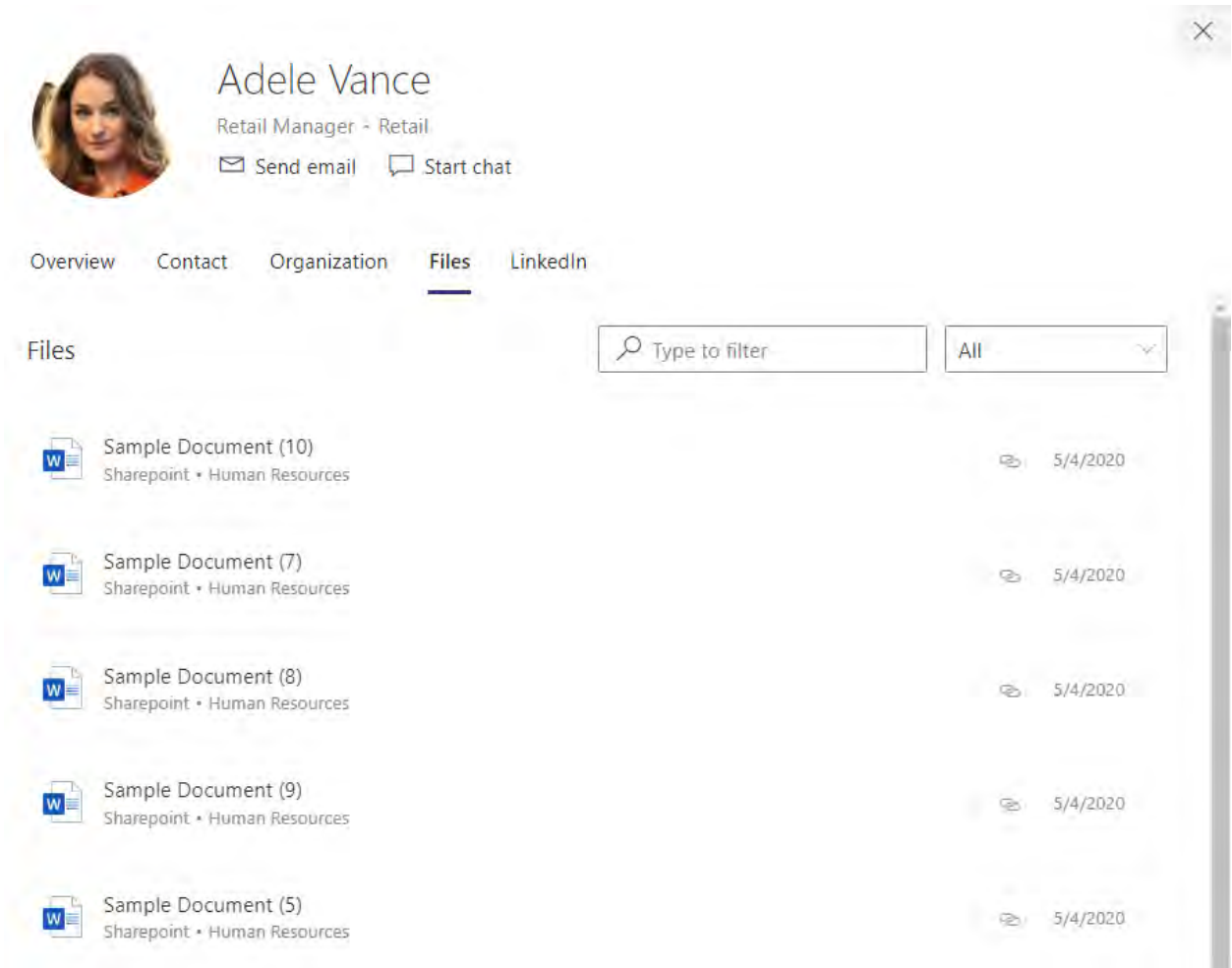
- o
- An org chart control based on staff hierarchy and AD report to/manager information.
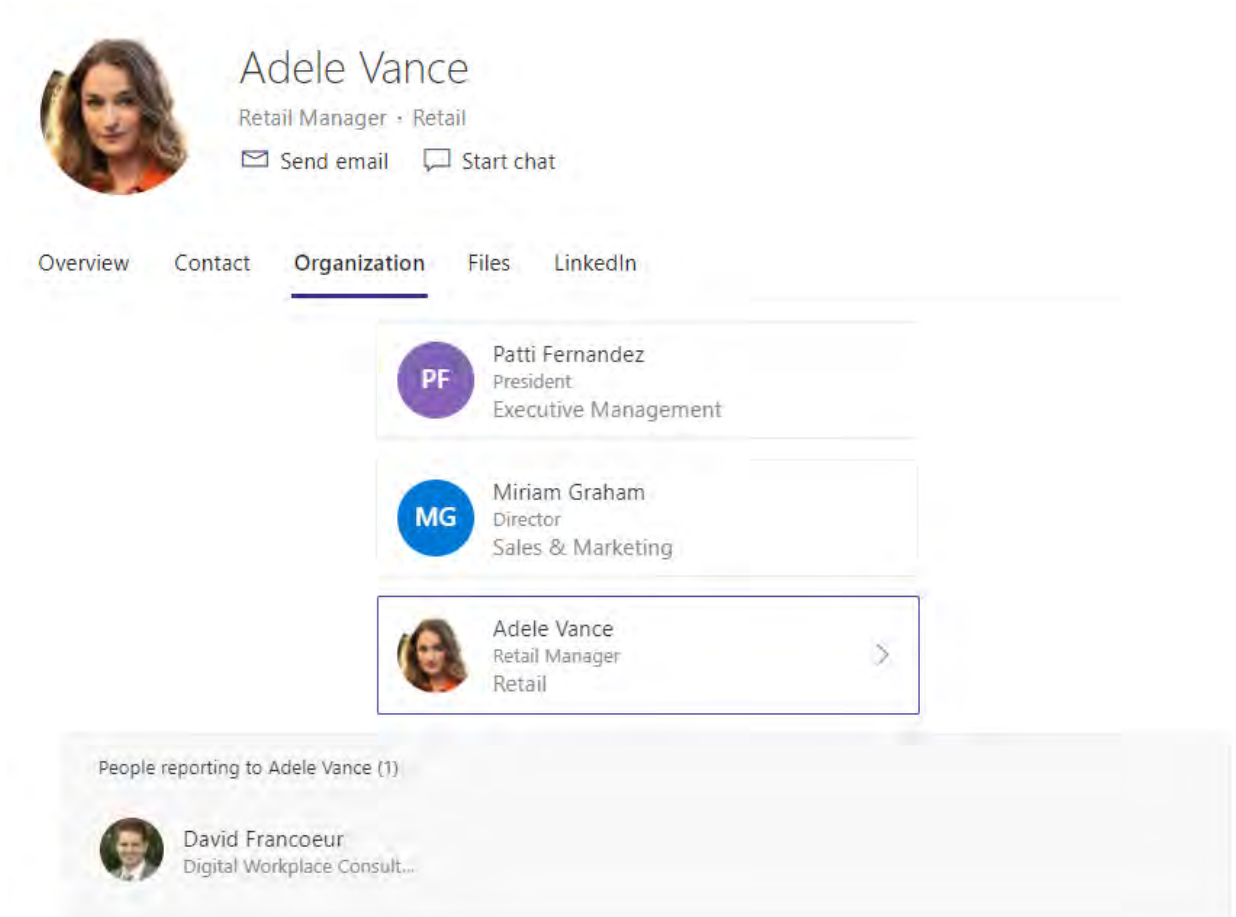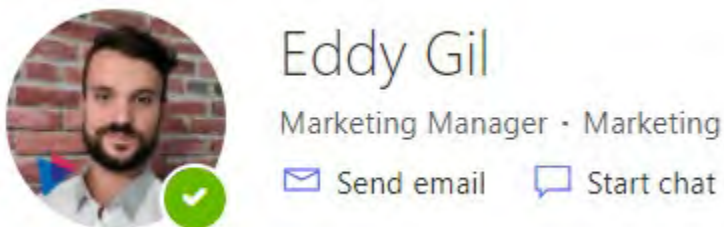
- o
- Many fields are interactive:
  - o The phone number field can be selected to dial out to the individual using Microsoft Teams or your preferred app.
  - o The email address is enabled with a mailto: to make it easy to start an email with the user.
  - o The chat field allows you to begin an instant messaging conversation with them in Microsoft Teams or your choice app.

- Profiles contain recent documents from the individual and documents trending around them.

- Profiles share free/busy insight to help get in touch with an individual more easily.

These profile pages in Microsoft 365 cannot be customized only enhanced with some extra properties. One of Intranets' common design and development patterns is to customize the look, feel, and content of user profile pages. In Microsoft 365, this isn't a pattern of customization.

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You can add user profile properties that can be a great way to improve the people search experience and user profile experience. Each user can theme their profile by changing the cover photo, and more customization options are coming.

•

Another reason we no longer customize profiles is that Microsoft does a great job of bringing profiles forward (giving users one less place to have to navigate to). This is done today by popping out a people card whenever you hover over someone's name or picture throughout Microsoft 365. By clicking the 'show more' link, a complete profile will slide in from the right.

This profile contains:

- contact details
- your notes about this person
- information about this person, such as their past projects or expertise
- org charts/who they work with
- their recent files
- LinkedIn details about the user (based on opt-in and org config)

4.10. The SharePoint Mobile App

A SharePoint mobile app enables your users to stay connected to important content, sites, portals, and people from your intranet while they are on the go.

Every organization should embrace and encourage this app's usage and integrate their mobile investments in a complimentary way (if your organization is up for building app experiences).

This app is infused with intelligence from the Microsoft Graph to help users navigate more quickly to content and people that matter to them the most.

- The News tab shows you personalized news from your sites.
- The Find tab gives you quick access to frequent sites, team members, recent files, as well as popular searches and featured links.
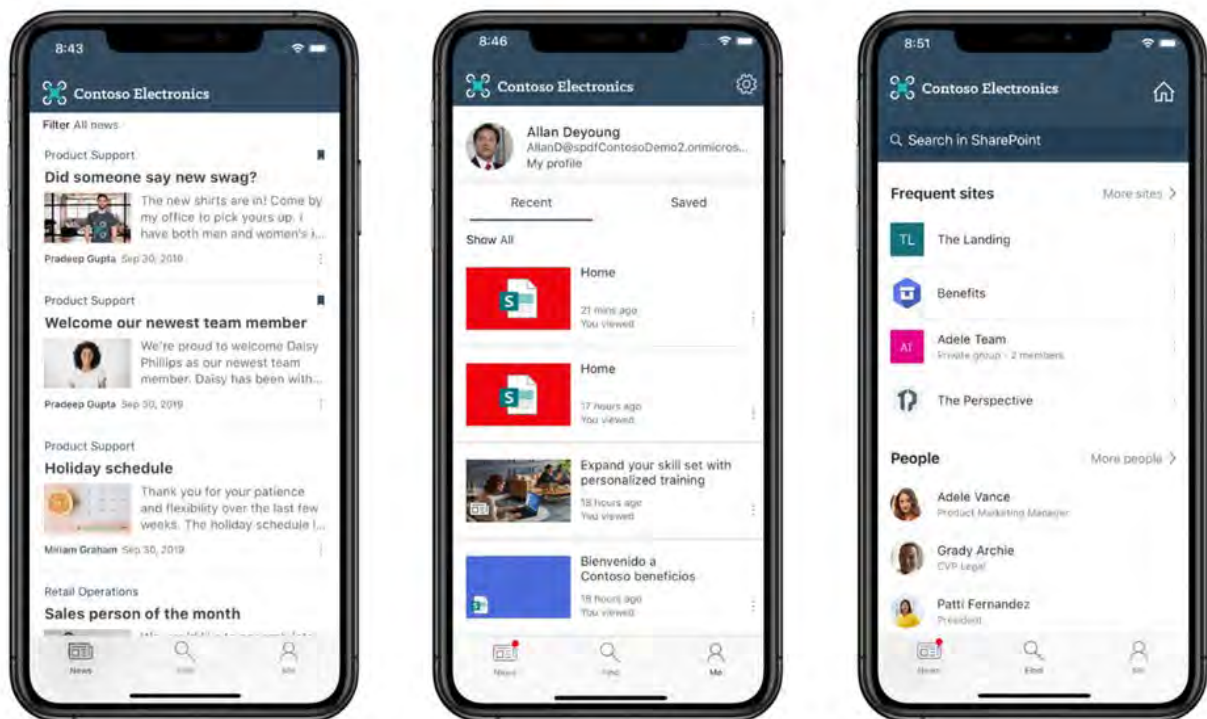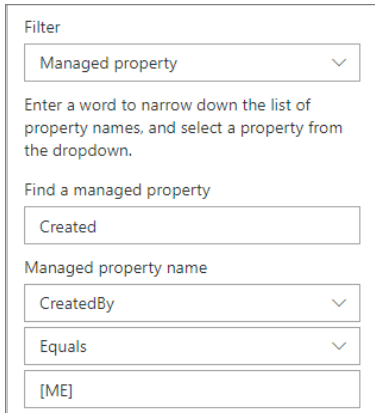
- The Me tab gives you access to your recent and saved content for a quick shortcut to get back to your work.

Microsoft is delivering on the promise of a true enterprise content services app experience in your pocket. An app experience that isn't just about the Intranet but integrated with your company's broader digital workplace is embracing.

4.11. Personalization

There are many personalization spaces in SharePoint and Microsoft 365, but these often require you to navigate to them. Here are a few: My Feed, My Recent Documents, My Pinned Documents, Documents Shared With Me, Sites I Follow, Recommended Files, etc. Many show up in the "Microsoft 365 home" experience, on most SharePoint intranets or within a user's OneDrive.

Filter

Managed property ⌄

Enter a word to narrow down the list of property names, and select a property from the dropdown.

Find a managed property

Created

Managed property name

CreatedBy ⌄

Equals ⌄

[ME]

Today, there are a few ways to surface some of those personalized experiences in SharePoint or Microsoft teams. SharePoint modern sites have a control called "Highlighted content," which you can filter to the current user. In this way, it can show targeted content like the most recent documents (or any items) that were modified by that user within all sites associated with a hub site or a particular site.

4.11.1 My Feed Web Part

This is your personal feed of content and activity from across Microsoft 365, based on what's likely to be most relevant to you right now.

The feed is personal to each user. What you see in your feed is different from what your colleagues will see in theirs. Your feed can show your documents as well as different content from others.

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4.12. Social Integration

Every modern and engaging Intranet needs to embrace social collaboration and social networking. How your organization integrates social into your Intranet experience on Microsoft 365 is up to your organization.

We have many recommendations here as we have been a long-standing social collaboration and networking services partner.

The most crucial thing is to embrace a **social platform**. If you embrace Microsoft 365, you may already be aware that Microsoft 365 includes an industry-leading enterprise social platform called Yammer.
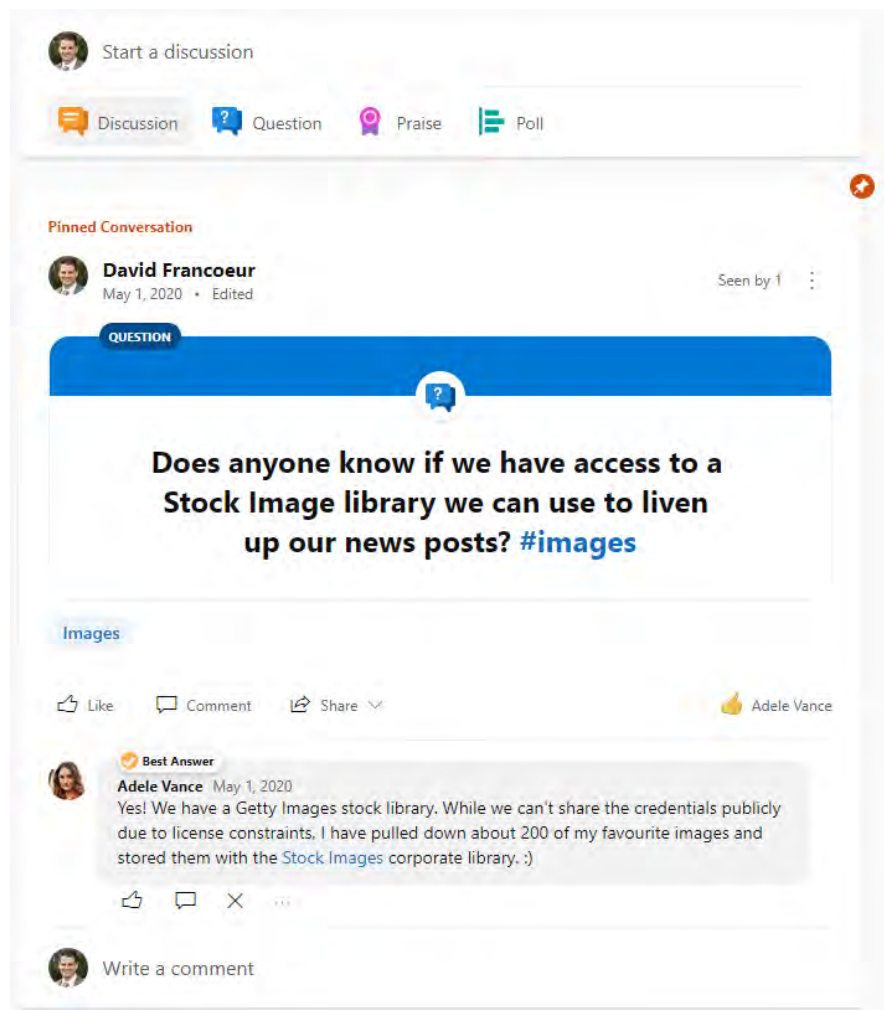
When you integrate this into your Intranet experience, it doesn't just mean embedding Yammer into key pages; it means planning carefully for the right patterns and taking full

advantage of the platform's capabilities. As one example, consider using the following or a specific topic/hashtag when embedding Yammer on the Intranet homepage. Using a topic/hashtag like #YourIntranetName allows users to self-curate the key posts they want to display on the site. *Under any circumstance, do not just slap/embed the all-company feed on the Intranet homepage. The all-company feed is often misused and doesn't contain good content that should be prioritized on a typical Intranet homepage.*

As another example in the image shown here, you can see a Yammer feed embedded within an Intranet page. This feed has a poll which is something Yammer natively supports. This is the kind of advanced social interaction that Yammer supports beyond a flat news feed.
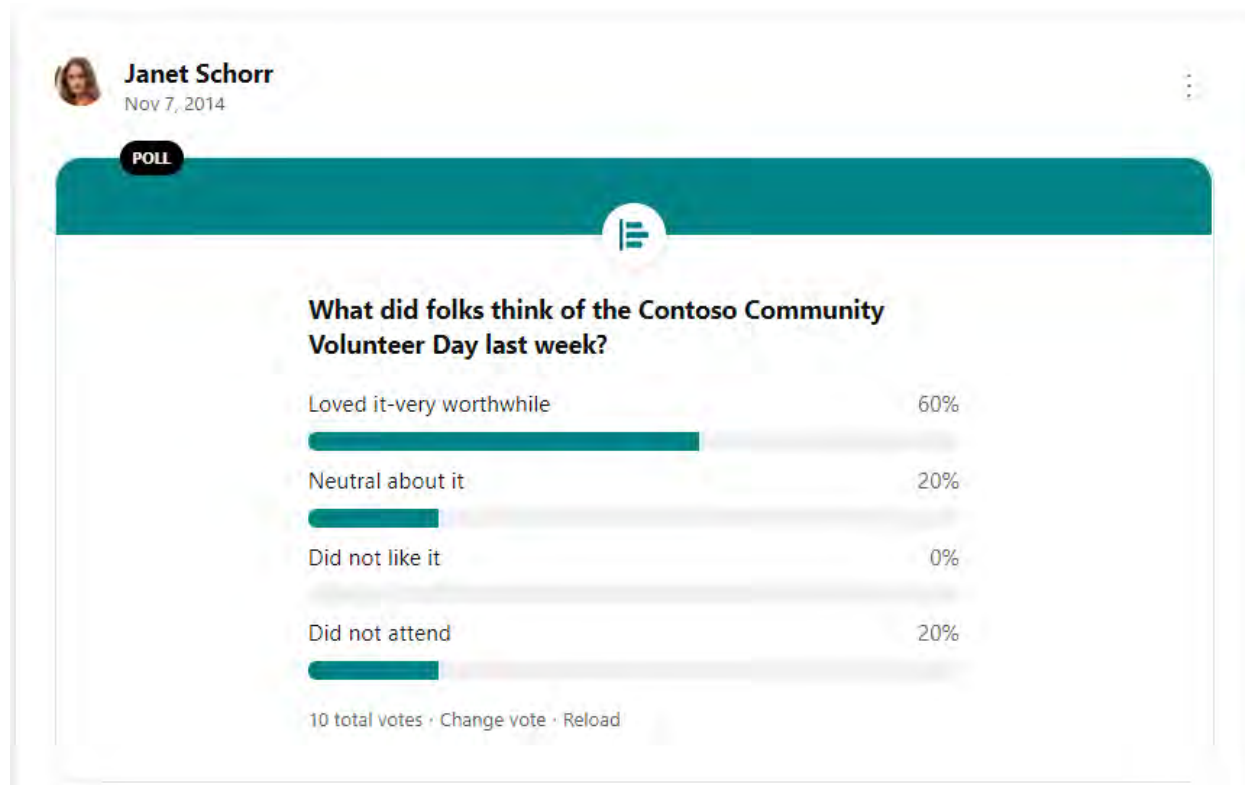
4.12.1. Caution on Comments

Unfortunately, SharePoint and social integration do suffer from one key investment you will have to navigate. Today the comments engine for modern news and pages is an experience built into the page itself. This can be turned off, and you can add a Yammer web part targeted to a feed that represents the associated page/topic. This requires manual effort or customization as the out-of-the-box experience does not connect the social comments or likes on news/pages with Yammer today.

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While the built-in commenting on News pages is likely to make sense for most organizations, we still recommend encouraging and using yammer occasionally to amplify a comment stream, as this can increase overall visibility and engagement.

Keep in mind that many organizations still build their own modern news roll-up control (to combine classic and modern news or tailor the layout/author experience). If you build your own, you can also have web part surface things like Yammer comment counts related to that object reference (news article) in the experience itself to further encourage engagement even in the previously published articles/pages.

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4.13. Analytics & Key Intranet Metrics

Analytics can provide intranet stakeholders with incredible insights into their internal activity, but it's often not obvious what metrics are most critical. The wealth of intranet information that analytics solutions provide can be overwhelming.

There are a handful of metrics you can begin using immediately to analyze, engage, and enhance your SharePoint Online intranet portal since intranets are something near and dear to us. That can be showcased in many ways, one of which would be that our staff has proudly been awarded Neilson Norman Intranet awards multiple times. We would love to share some key metrics that we know will help sharpen your digital workplace.

The following SharePoint intranet metrics are the foundation for understanding what is and is not working for your internal portal. With digital workplace activity and adoption on the rise, there has never been a better time to continue strengthening your intranet's relevance and build a better employee experience.

Here are the basic ones you should be reviewing, sharing, and actioning.

4.13.1 Hub and Site Level Information

Indicates the total number of individual users who visit a site during a specific period, not counting repeat visits by the same individual. This often needs to be displayed by page, site, and, if possible, 'collections' of sites, known as Hub Sites.

Microsoft 365 provides this capability for all three levels out of the box with a hub, site, and page analytics (coming soon). This allows you to narrow down and explore unique users based on your intranet's targeted portion or your Intranet overall.
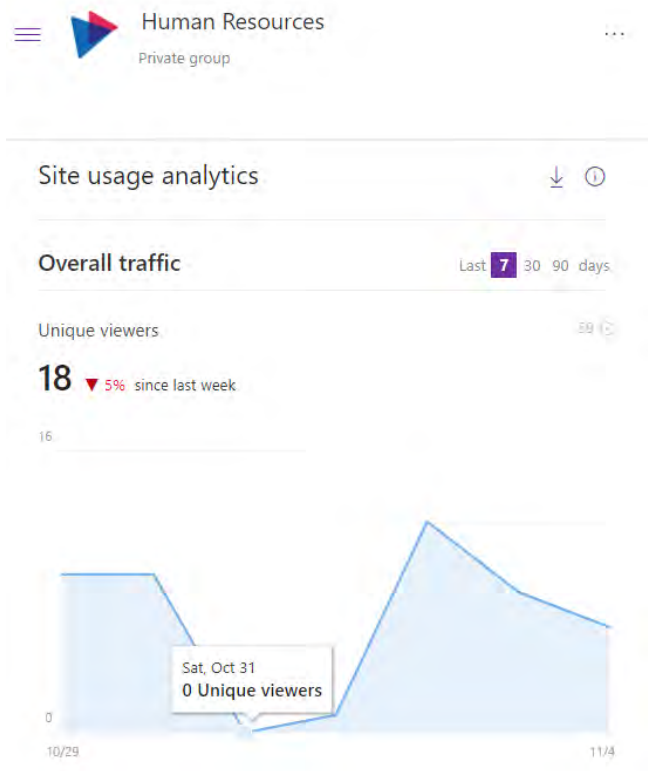
Site Level Example
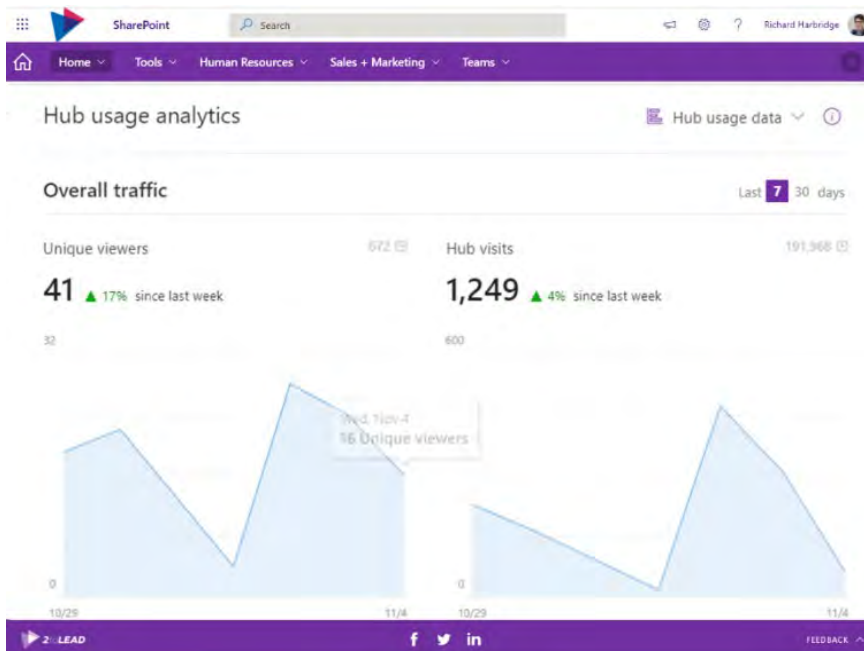
Hub Level Example Understanding the information

Unique viewers data shows if your content is successfully driving users to the intended sites. An upward trend over time indicates a useful intranet to users, which generates a positive user experience. If your unique user count is stagnant, you may need to reassess your intranet strategy or perhaps offer to train users with lower adoption rates.

The new Site Usage dashboard also provides a snapshot of popular content across Sites, Site Pages, News Posts, and Documents.

4.13.2. Item-Level Information

This information displays the number of page views for a specific item. Each document or page in SharePoint can provide 'at-a-glance' insight into its views which is excellent for content authors being able to self-service how their content is performing.
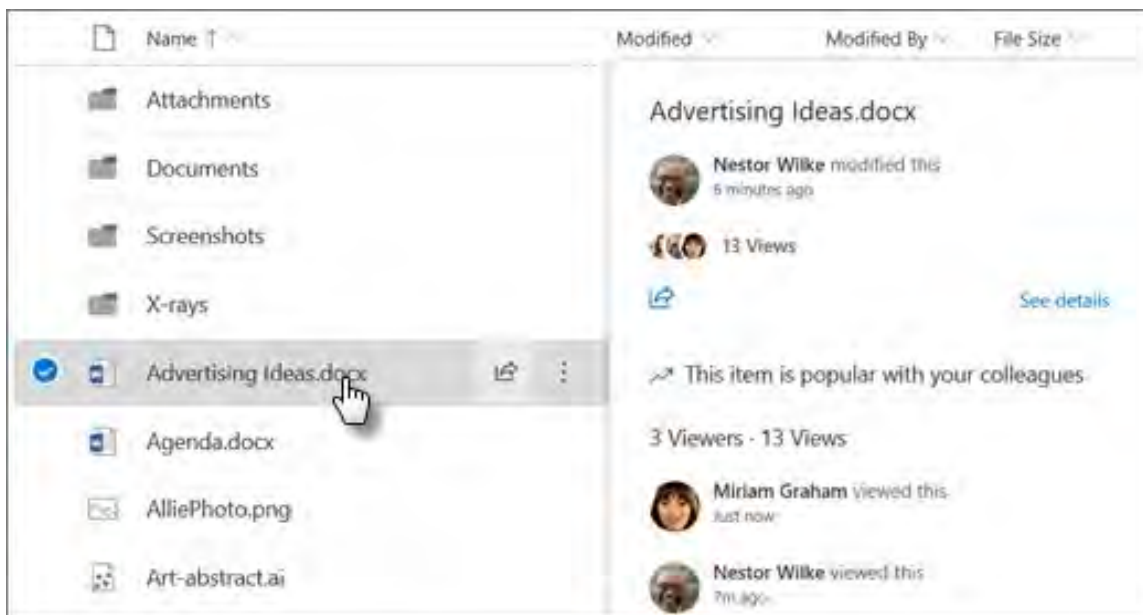
This is richer for pages, and Microsoft is providing continuous improvements.
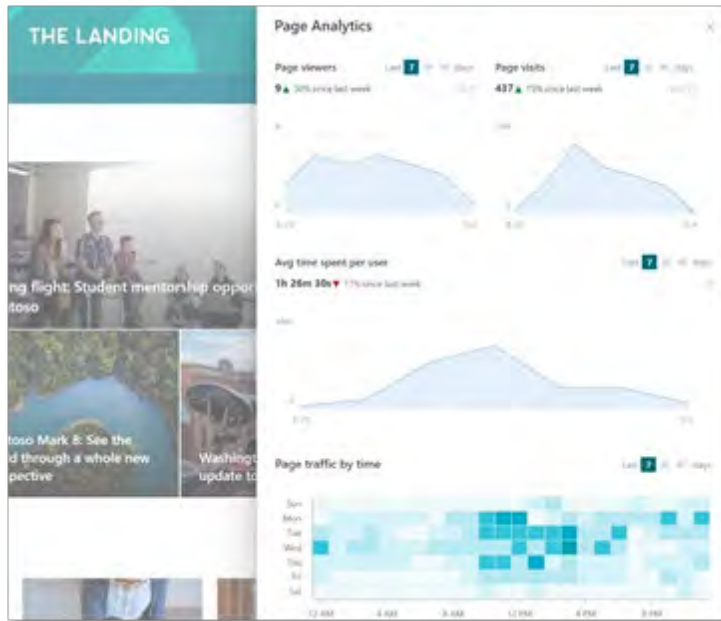
4.13.3. Unused Content Reports

Displays the content that has not been viewed within a specific period (ensure your reporting tool can provide data on content with 0-page views).

This can be done on a case-by-case basis with scripting techniques like PowerShell. It is an excellent example of where out of the box doesn't scale to meet many organizations' needs, and it might be best to evaluate a 3rd party product.

Understanding the information

Once you understand which content is not being used, you can act! Should the content not be needed, delete or archive it. If required and users don't know how to access it, make sure you have linked to this content from your home page or other main pages.

Following up on your metrics

After adequately analyzing the information you've now retrieved and acted on, you should begin to see increased intranet performance. If you're still wondering how you can make sure your communication and collaboration efforts continue to turn into engaged users, actively check back and experiment. Remember, employee engagement doesn't happen overnight, but proper intranet management, including reviewing these metrics, will ensure success.

4.14. Technical Intranet & Digital Workplace Best Practices

There is an incredible amount of effort that goes into designing a world-class and highly successful Intranet or Digital Hub for a Digital Workplace. There are many technical best practices and considerations beyond some of the ones outlined throughout the design best practices above that are worth understanding.

4.14.1. Enabling Multi-Factor Authentication

Microsoft 365 provides security and authentication features that many customers have not had available for previous iterations of their Intranet. This was often due to the high cost or complexity of implementing them. For example, Microsoft 365 supports multi-factor authentication at no additional cost and is extremely easy to administer and implement.

To be clear, this is a feature that is highly recommended to be mandatory and turned on for all users. However, for some organizations, they implemented Microsoft 365 Intranets without knowing it was available or sometimes have held off moving to Microsoft 365 because they didn't know this was possible (and easy).

Multi-factor authentication increases the security of user logins for cloud services above and beyond just a password. With Multi-Factor Authentication for Microsoft 365, users must provide further proof that they are indeed who they say they are. Today this is done primarily via an app notification on their smartphone after correctly entering their password. Only after this second authentication factor has been satisfied can a user sign-in.

After being enrolled for multi-factor authentication, the next time a user signs in, they see a message asking them to set up their second authentication factor.

4.14.2. Planning for Secondary Users

When using SharePoint Online and Microsoft 365, additional planning may be needed around secondary users or users that are not part of the Intranet membership.

Multi-Tenant Or Multiple Orgs In One Tenant

As an example, if you have a large enterprise, you may have multiple businesses within one Microsoft 365 tenant or, more rarely, across various tenants.

Suppose this is the case for your business. In that case, you need to set the right expectations early that some experiences like people search (often considered part of intranet planning) may not necessarily be isolated to your business group from the broader organization - if you are in one tenant. Similarly, search can be fragmented when across tenants. While you can create custom search pages and tailor search results to show only users from your organization, we recommend caution here. There are many 'global' wide search experiences throughout the Microsoft 365 apps connected to your Microsoft 365 Intranet.

Large Number Of Unlicensed Microsoft 365 Users Or Licensing Alternatives

While Microsoft 365's first-line worker and other licensing options may be an excellent fit for many organizations, some organizations are still adjusting to take full advantage of the platform for these workers. They see the long-term value in the entire suite of capability for this workforce but need more time to align a rollout strategy and a way to measure the positive impact these digital tools have.

In other words, for those organizations, the licensing cost is prohibitive for the use of only an Intranet for these users, but they see the value in the Microsoft 365 platform in the future. This happens quite a bit in retail. They almost need a step-up model to provide a great Intranet experience for a core group of information workers. As for the broader organization, a communication-oriented experience that builds on Microsoft 365. This avoids creating another major silo - as so many points solution Intranets can.

For scenarios where many users are unlicensed, it is important to note that Microsoft 365 has impressive partners in the ecosystem. LiveTiles reach allows you to have a much lower cost Intranet for all users, including those who don't have Microsoft 365 licenses, while still enabling improved experiences that tie into Microsoft 365 for those who do. If you have a workforce unlicensed today, it's well worth a look!

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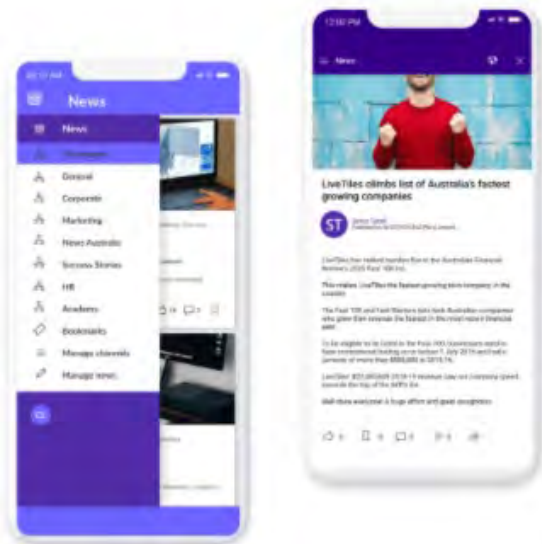
4.14.3. External Users & Extranets

Most Intranets don't necessarily include a strategy for external users and external sharing. However, it is important to understand how you will handle and tackle external sharing and whether the entire Intranet collection will have external sharing disabled.

Things like MFA for external users are supported via Azure B2B. You can even explore some of the latest innovation that allows you to do external user lifecycle management in Azure. So be sure to carefully plan the optimal external sharing and extranet strategy for your organization.

4.14.4. Availability & Outages

One concern people share is that they are concerned that there could be availability issues or outages that impact their organization. Considering the critical nature of an intranet, this is an important risk to evaluate.

Microsoft provides a commitment to delivering at least 99.9% uptime for Microsoft 365. They have maintained that commitment. Microsoft also offers historic uptime tracking.

To date, the worldwide uptime for Microsoft 365 can be found in the trust center and has been:

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2toLEAD

2020

Q1	Q2	Q3	Q4
99.98%	99.99%	99.97%	

2019

Q1	Q2	Q3	Q4
99.97%	99.97%	99.98%	99.98%

2018

Q1	Q2	Q3	Q4
99.99%	99.98%	99.97%	99.98%

2017

Q1	Q2	Q3	Q4
99.99%	99.97%	99.98%	99.99%

4.14.5. How Does Microsoft Communicate Around an Outage?

During an outage, Microsoft communicates outages through **seven** channels today.

1. Via the Microsoft 365 Service Health Dashboard
2. Via the Microsoft 365 Message Center
3. Via the Microsoft 365 Admin App
4. Via the Microsoft 365 Service Communications API
5. Via the System Center Operations Management 'Management Pack' For Microsoft 365
6. Via http://Status.Office365.com
7. Via Microsoft Employees (Who Use Internal Tools/Systems)

Microsoft has also invested further into incident service communications.

They are working on making the communication even **timelier**:

- Red Alert monitoring & SHD automation.
- Closure Summary and Enhanced Post Incident Report (PIR) process.
- Increased listening systems: support "Big Red Button."

They are working on making the communication even more targeted:

- Authenticated SHD
- Tenant level posts

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- Critical Functionality Loss (CFL)

They are working on making the communication even more accurate:

- Provide more technical detail.
- Share new fields like:
    - Estimated time to restore.
    - User workaround.
    - Percent of users are impacted.
    - User experience.
    - Customer impact.

4.14.6. Can We Recover Intranet Content or Back It Up?

In today's world, customers need to make educated and informed investments. There are legitimate reasons you should consider a backup or recovery 3rd party with SharePoint Online. These investment decisions should be based on an accurate understanding of the capabilities available out of the box first, as introducing another solution has its own risks and costs that come with the benefits these solutions can provide.

If you already own a great backup and recovery solution and are satisfied with it, there is no reason to read further. If you work at a backup or recovery vendor, we hope this helps your customers and prospects understand why and when they should invest. Suppose you are a customer or consultant trying to understand when and why people invest in backup and recovery solutions for SharePoint Online. Then, we hope this will help you.

Backup Versus Archiving

It should be noted that discussion in this will focus only on backup and recovery scenarios. However, it is important to understand that archiving must also be considered and understood. What Microsoft offers out of the box there can impact your backup strategy.

Archiving strategies may not only provide more ways to manage, restore and protect content – but it also arguably may save costs since archiving means moving content, not replicating it (as most backup scenarios do). This means not only less storage or associated complexity costs but could also mean a better experience as it reduces unmanaged sprawl and the associated risks (around navigation, permissions, and search).

When Should You Invest?

When key functionality is required, that is not available OOTB today. As a quick summary, you should ONLY invest if you have one of these requirements.

- When you need to have a recovery solution that will have an extended recovery window longer than 107 days:
    - Note that based on your organizational risk, you may be confident in what is available OOTB for timeframe here as a significant portion of recovery scenarios fit within this time window.
- You need a restore window that is longer than 30 days if a mass malware encryption attack is performed on synced content for a user and goes without detection for those 30 days.
    - Note that this is also something that customers may not feel is an organizational risk that is likely enough to support the investment and complexity involved in 3rd party backup options. This is because it relies on poor protection, then syncing, then being undiscovered for over 30 days which are unlikely and much less likely when taken together).

The scenarios above are the most common drivers we see across customers.

If your organization accepts the risks outlined above and understands the capabilities you can administer with the tools, options, governance, monitoring, alerting, and controls you have in place out of the box, you don't necessarily need a 3rd party backup tooling. That investment can be prioritized on other things that deliver more value (like perhaps E5 security capabilities or services from a friendly Microsoft Partner to implement better Governance and management).

What Is Important For A Vendor Option?

While not a comprehensive list, we thought we would quickly summarize a few considerations that you should keep front and center if you decide to opt for using a 3rd party vendor or extending the backup options yourself.

1. Ensure you understand how the data is encrypted during the backup process and while in storage.
2. Do you have control over the storage, and can you determine where to store it (even your own location)?
3. Can you back up to cloud, local, or both?

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4. What are the performance implications and considerations?
    a. Note this is a critical one. To do a backup in Microsoft 365, the API is leveraged, which must deal with limits around throttling and Microsoft controls. This may impact OTHER projects such as ongoing migrations, other code, or other 3rd party solutions. Do not underestimate performance implications for both. How long it will take, what the backup window might be, and what impact it might have on areas besides backup.
        i. We know of no vendor/option for SharePoint Online that doesn't use the API today.

What Are the Primary Concerns around Data?

There are several identified and known industry drivers around backup and recovery that spur customer investment. We will outline each of them here and then address them each in turn.

User Error Incurred Data Loss

The pattern here is that a user may accidentally delete or move content, folders, libraries, sites, site collections, or more from SharePoint, and you may need to recover that data. First, and most often, as a user, and sometimes with an administrator's help (or as an administrator).

There are many effective options here out of the box. Two primary approaches are outlined a bit further in this document with File Restore and Recycling Bins.

Keep in mind that content under a hold or archived (via many methods) may also be protected from accidental or user error incurred data loss.

Administrative Misconfiguration
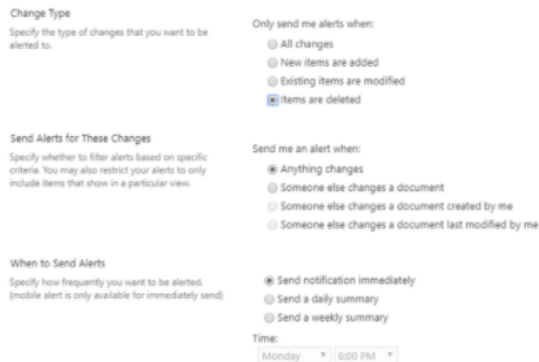
Essentially this pattern is when someone deletes a site that shouldn't have been deleted. These happen rarely and are best dealt with by effective site lifecycle management. When they do occur, they can be restored using the same recycling bin concept.

https://docs.microsoft.com/en-us/sharepoint/restore-deleted-site-collection

Malicious Insiders

Not only is this reported on potentially with Cloud App Security and the built-in alerting in Microsoft 365 (unusual file deletion events), but it is also restorable based on the recovery windows identified in this document (93 days + up to 14 days via MSFT request).

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All activity is also audited in SharePoint Online, which helps determine who did it, when they did it, and how they did it. You could also configure alerts that allow you to be notified (or to have someone else notified) when a folder, library, or specific document is deleted.

You could even have a targeted sensitive collection copied via a power automate process, Microsoft migration tooling, custom code, or other methods, which may be preferable to 3rd parties depending on your organizational preferences, licensing, or resources.

External Threats

There are many external risks that Microsoft 365 addresses through a plethora of security offerings that can be implemented. Most of these reduce or remove any risk for the files online, and many layers of security and protection can be enabled on the device layer, especially on Windows 10 devices.

So, where is a good example of a 'more common threat'? One of the most common patterns here of threat is ransomware on files themselves that are synced from a local machine to SharePoint Online. In this model, the content is encrypted and unable to be read. However, this is almost entirely mitigated by the Files Restore capability assuming users notices within 30 days that their files are locked (as these are almost always detected quickly).

Note that if the window is longer than 30 days for this unlikely event and it is missed, it will be more challenging or may not be possible to restore to the point in time prior to the malware encryption.

Mandated Centralized Backup

We see this rarely, and it's often due to outdated contracts (which also may say the data cannot be stored in the cloud in the first place). Most of the time, the contracts with customers or parties should be updated here to account for many other legal risks since they are outdated. If there is

a very special compliance rule in place for some of the content, but not all which means this should only be applied to that content if possible to keep costs and complexity lower.

If this is a requirement, you will almost certainly need to look into backup and archiving solutions/patterns that meet your needs.

Microsoft Responsibilities

By default, content is stored indefinitely on your sites. Without labels, retention rules, information policies, or explicit deletion (by a user or code), you won't have to worry about the data disappearing as a standard rule.

Beyond what is outlined in this document (or, if more up to date – the service definitions and capabilities active in SharePoint Online), Microsoft is not responsible for your recovery or backups of data.

This is the same stance Microsoft has for data breach scenarios. In other words, Microsoft's terms and conditions when you sign and use their service indicate clear expectations of ownership and liability. **You are solely responsible for the content of all customer data.**

How you are responsible for your data is up to you. Suppose the out of the box capabilities don't meet your risk concerns. In that case, once again, we encourage 3rd party investment in additional backup options or extending the capabilities in the platform yourself (based on targeted needs).

Based on our professional opinion: Major Public Cloud vendor resiliency services are overall better than current legacy-datacenter or domestic private and public cloud vendors. A wide range of Catastrophic failures on a public cloud vendor has never been recorded.

One minor question we sometimes see here is when performing a cloud exit. Note that if you exit your subscription, there is an identified subscription lifecycle that Microsoft adheres to. This does mean that when your tenant is de-provisioned, data will eventually be deleted. No copy will be provided to you unless you A) migrated the data to wherever you want it stored or B) performed other methods to extract desired data. So there may also be some minor considerations here that are worth understanding depending on your organizational strategy, goals, and requirements.

Keep in mind Microsoft discloses audits and other great material on how they handle DR today. These can be found at https://servicetrust.microsoft.com/ or in your tenant's admin centers such as the "Business Continuity and Disaster Recovery Plan Validation Report."

Backup & Recovery Myths?

What are the most frequent incorrect statements we hear individuals cite?

- You cannot restore the content if it is deleted in SharePoint Online, Teams, or OneDrive.
  - There are limits on how long the restore is available, but there are multiple ways to restore.
- You cannot make a point-in-time restore of a file in SharePoint Online, Teams, or OneDrive. (Or it can ONLY do "in place" restore.).
  - This is false. OneDrive has had this capability for some time now. SharePoint (and Teams by proxy or even potentially Yammer) had this feature roll out in early 2019. This is called Files Restore. This isn't the only way to restore files, but it's a great example of something many customers are unaware of when evaluating backup/recovery vendors today.
- The responsible IT decision is always to have a 3rd party backup and restore solution.
  - This is false. While there are legitimate times for this, it is not always as critical as other key investments your organization may want to prioritize. Like many IT costs, unless it is an absolute mandated requirement (hopefully an educated one), it will be a risk evaluation.
- You need a backup and restore solution, or you will be out of compliance.
  - It depends, but more often than not – false.
- You can only restore X or Y for up to 30 days from deletion.
  - This one is a weird one we have seen a lot, luckily many show close to the accurate answer of 90 days, but that is also false. It is 93 days + 14 days for the recovery period. It may not seem like 107 days is a big difference from 30 days. Still, depending on how you evaluate the risk and investment, this can be a driver for prioritizing a different investment with a higher risk as an IT leader.
  - Sometimes, there is confusion around how long it can stay in aggregate (meaning does the count restart in the second stage recycling bin? The duration is the same in aggregate regardless of which recycling bin the data is stored in. More on this in this document as well.

Options Out Of The Box In SharePoint Online

There are a few ways you can recover SharePoint data based on out-of-the-box behavior.

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Versioning & Version Control

This is the simplest solution available to you. As a document gets updated, new versions are created. At any time, you can get back to an older version and even restore it as the current version.

Keep in mind that for each version stored, you are storing a copy of the document, hence taking up additional space on your tenant. These can be limited if you choose, but it is important to know how it stores each document type. For example, Office documents and others only store the change's delta, not the entire document each time. So, saving a 50MB Word document 50 times after 50 edits doesn't mean it will be 50MB x 50 in storage costs. Instead, it only saves the few KB that represent those changes in each version.

Files Restore

Files restore for OneDrive, SharePoint, and Microsoft Teams is one of the self-service recovery solutions that allow administrators and site owners to restore files from any point in time during the last 30 days. This is mainly to restore a library to a specific date and time (point in time restore).

One of the best use cases for this is when corruption, malicious actions, or malware encryption have impacted files' access.
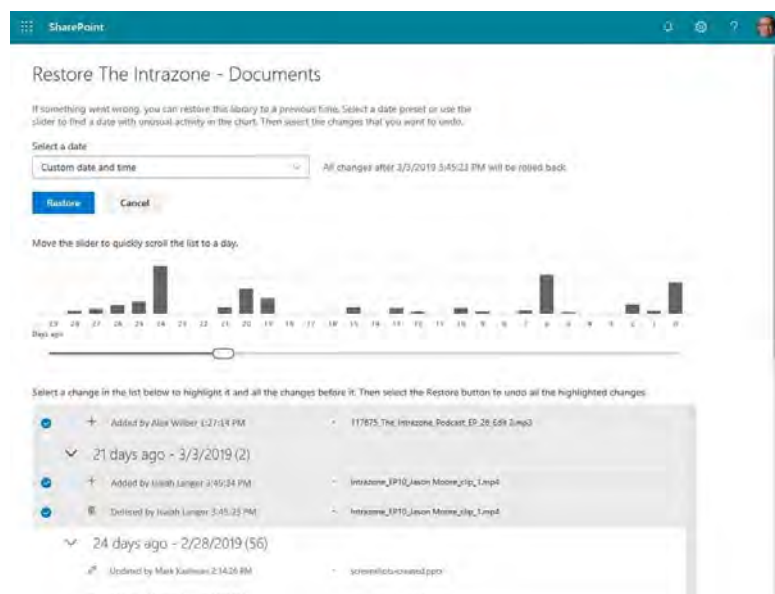
An example scenario:

If lots of your SharePoint or Teams files get deleted, overwritten, corrupted, or infected by malware, you can restore your entire document library to a previous time. Files Restore Microsoft

365 subscribers undo all the actions that occurred on both files and folders within the last 30 days.

There are still reasons you may use the other methods of recovery. So be sure to evaluate the recovery situation as an administrator before always defaulting to this method.

What are some of the limitations of Files Restore today?

It doesn't restore column or field data or list data (so this is just for files).

Recycling Bins

SharePoint Online will store deleted content in the recycling bin of the deleted site. This stores the item for 93 days. It allows any site owner to restore from the recycling bin to the location the content was deleted from.

In SharePoint, items are retained for 93 days from the time you delete them from their original location. They stay in the site Recycle Bin the entire time unless someone deletes them from there or empties that Recycle Bin. In that case, the items go to the site collection Recycle Bin, where they stay for the remainder of the 93 days unless:

- the site collection Recycle Bin exceeds its quota and starts purging the oldest items
- the items are manually deleted by the site collection administrator from the site collection Recycle Bin

The site Recycle Bin storage counts against your site collection storage quota and the List View Threshold. The amount of space allocated to the site collection Recycle Bin is 200% of the site collection quota. These values are not configurable.

The Second Stage Or Site Collection Recycle Bin

SharePoint Online will store deleted libraries, sites, and site collections for 93 days in what is known as the Second Stage recycle bin.

This duration of 93 days is per content deletion. This means that while a user can remove something from the site recycling bin, it will transfer to the Second Stage recycling bin, where it will be stored for the remaining 93 day period. So if the content is in the site's recycling bin for 30 days and a user deletes it from this bin (instead of it auto-deleting at the end of 93 days), it will go to the second stage recycling bin for the remaining 63 days of the 93-day term.

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If an administrator deletes the data from the Second Stage recycling bin, this can be restored for up to an additional 14 days by submitting a service ticket to restore the deleted data. Microsoft backs up twice a day and would restore it from one of those backups.

Note that this ticketing process has no guaranteed SLA. When Microsoft restores your data, it will be done based on a site collection level and "in place" and not "based on a point in time."

This can be beneficial as it may lead to less re-work for active sites/spaces, or it could be more re-work due to duplicate data that must be cleaned. To ensure you have all the data, duplicate items are appended with a _1 rather than overwriting them and to avoid conflict. This means that the administrator supporting the request will need to perform additional site cleanup depending on the scale of the content restore scenario.

Here is a Microsoft support article that describes the process in full:
https://support.microsoft.com/en-us/office/restore-deleted-items-from-the-site-collection-recycle-bin-5fa924ee-16d7-487b-9a0a-021b9062d14b?ui=en-us&rs=en-us&ad=us

Keep In Mind

- **Securable objects bring all their contents back with them**

    When you restore any securable object (any object to which access can be controlled), it is restored with all of the objects that it contained when it was deleted. For example, if you restore a list, library, folder, or Document Set, the restored version contains all the documents and other items that it contained when it was deleted. If you restore a file or other item that has multiple versions, the restored file or item includes all the versions it contained when it was deleted.

- **Most objects can't be restored if their container objects aren't present**

    If you delete an object and then delete the object that contained it, you must restore the container before you can restore the object. For example, if you delete a file and then delete the library in which it was stored, you must restore the library before you can restore the file. If you delete an earlier version of a file and then delete the current version of the file itself, you must restore the file itself before you can restore the previous version.

    - **Exception: An object deleted from a folder can be restored without first restoring the folder**

The folder is automatically re-created in its former location but now contains only the object that you restored. Alternatively, you can also restore the folder manually from the Recycle Bin, in which case it's restored with all the contents that it had when it was deleted.

Sites & Groups

Deleted SharePoint sites are retained for 93 days. After 93 days, sites and all their content and settings are permanently deleted, including lists, libraries, pages, and any subsites.
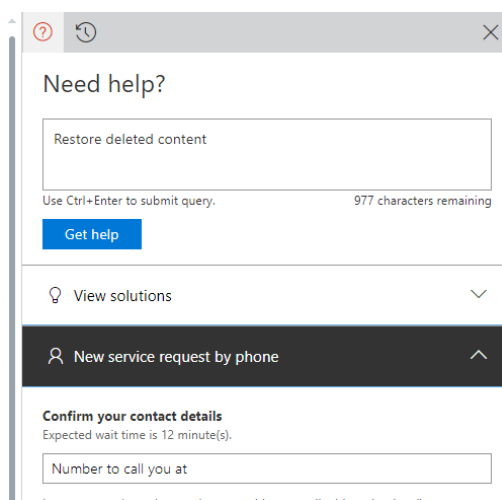
Restoring a site that belongs to a Microsoft 365 group restores the Microsoft 365 group and all its resources. Note that the other group resources are retained for only 30 days, whereas the site is retained for 93.

Requesting a restore from backup from Microsoft

This is called out in the recycling bins section. Suppose the content is permanently deleted from SharePoint Online (end of the period or removed from second stage recycling). In that case, you can still restore it for a limited window with Microsoft support.

In this case, a user with Microsoft 365 global admin rights will need to contact Microsoft through the help channels to request a restore. The restore process will bring back an entire site collection with all its content to the original location. This is important to remember, as you may have only lost a single file and will need to reconcile all the other content manually. Microsoft backs up content every 12 hours, and it takes a few days to restore, so depending on the urgency for getting the data, this may not be a viable solution.

You can make the request by phone or email.

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4.14.7. Retention Policies

Keep in mind that there are also ways to protect and control when data can be deleted (or should be deleted) beyond the restored options mentioned above.

When content is subject to a retention policy, you can continue to modify your content in its original location. But if someone edits or deletes content that's subject to the policy, a copy is saved to a secure location where it's retained while the policy is in effect. To further restrict how your content is handled, Retention Policies can be configured so that once they have been turned on for a specific piece of content, they cannot be turned off or made less restrictive. To meet this requirement, you can use Preservation Lock. After a policy's been locked, no one—including the administrator—can turn off the policy or make it less restrictive. Again, the Retention Policies are a safeguard against accidental (or malicious) deletion of content, not backup. If you introduce a Retention Policy that permanently deletes content, you will not be able to get it back once the policy takes effect.

4.14.8. Bandwidth & Connectivity

Planning for bandwidth is important for any Intranet accessed over the internet from employees at home, traveling, customer sites, or a remote office.

Microsoft has consolidated many suggestions to support planning in this article entitled ["Plan for network devices that connect to Microsoft 365 services"](#).

There are only a few ways to improve the performance or make the performance more predictable for SharePoint Online (where a Microsoft 365 Intranet would be hosted).

- Optimize Proxies, Firewall Devices, & Network Settings
- Purchase & Use WAN Accelerators
- Purchase & Use Azure ExpressRoute For Microsoft 365

You can use hardware and software load-balancing devices to ensure AD FS or Exchange availability in hybrid deployments and for SharePoint Online hybrid deployments, but that is more of availability than performance benefit.

While Microsoft Microsoft 365 uses Content Delivery Networks already (you get the benefits from that), customers cannot use their CDNs to cache content on local networks (though that may change).

4.14.9. Optimize Proxies, Firewall Devices, & Network Settings

Ensure proxy and firewall devices are sized to handle the additional traffic. The additional traffic going to Microsoft 365 results in an increase in outbound proxy connections as well as an increase in SSL traffic.

If your outbound proxies require user authentication, you may experience slow connectivity or a loss of functionality. Bypassing the authentication requirement for the Microsoft 365 domains can reduce this overhead.

If you are filtering outbound connections from computers on your network, bypassing this filtering to the Microsoft 365 domains will improve connectivity and performance.

Some customers find internal network settings may affect performance. Settings such as MTU sizes, network auto-negotiation or auto-detection, and sub-optimal routes to the internet are common places to look.

4.14.10. WAN Accelerators

Microsoft 365 does not require you to use WAN Optimization Controller devices (also known as WAN acceleration and caching devices) or traffic shaping/inspection devices (also known as packet shaping/inspection devices).

Customers may decide to use such devices to increase performance under high latency conditions or low bandwidth for Microsoft Exchange Online and Microsoft SharePoint Online.

There are great WAN devices and options out there that work well with Microsoft 365, but keep in mind that you may need to optimize your network device or devices to ensure that your users have a consistent experience when accessing Microsoft 365. Confirm with the vendor or your technical team if the device can handle appropriate traffic (such as how Microsoft 365 services encrypt some Microsoft 365 content and the TCP header information).

4.14.11. Direct Connection Via Azure Express Route for Microsoft 365

You can add a direct network connection to Microsoft 365 for selected Microsoft 365 network traffic. Azure ExpressRoute offers a direct link, predictable performance, and an uptime SLA of 99.9% for the Microsoft networking components. An internet connection is still required for workloads that are not supported over Azure ExpressRoute.
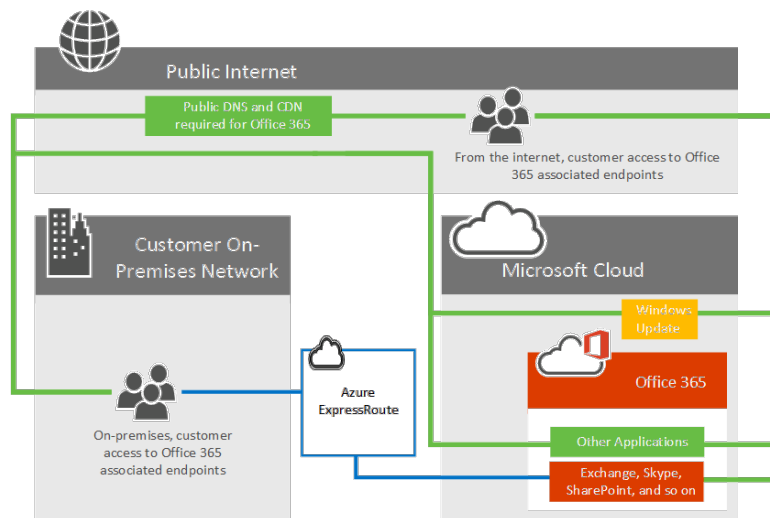
In addition to internet connectivity, some customers may choose to route a subset of their Microsoft 365 network traffic over a direct connection that offers predictability and a 99.9% uptime SLA for the Microsoft networking components. Azure ExpressRoute provides customers this dedicated network connection to Microsoft 365 and other Microsoft cloud services.

Regardless of whether you have an existing MPLS WAN, ExpressRoute can be added to your network architecture in one of three ways, through a supported cloud exchange co-location provider, an Ethernet point-to-point connection provider, or through an MPLS connection provider. See what [providers are available in your region](#). The direct ExpressRoute connection will enable connectivity to most Microsoft 365 applications, including SharePoint Online. Network traffic for all other applications and services will continue to traverse the internet.

4.14.12. Service Degradations

There have been service degradations for customers in Microsoft 365. These are communicated via the Microsoft 365 service health dashboard. They rarely impact your organization or users in a meaningful or notable way, but it is worth noting that they happen from time to time.

When a service is noted as having service degradation, it means that it can be slow, sluggish, or occasionally unresponsive for brief periods.

How might you experience this? We have seen situations where the search crawler is delayed on indexing new content, where site provisioning can be delayed, or where access or the managed metadata service might be unavailable.

4.14.13 Security

Microsoft 365 reduces the burden of performing routine IT management tasks such as keeping security updates current and performing back-end upgrades. Naturally, an Intranet on Microsoft 365 may be more secure with less overhead from an IT management perspective.

It's important to understand continually improving security management and security-enhancing features that are delivered to Microsoft 365.

4.14.14. Dynamic Group Membership & Rule-Based Security

One very common requirement in SharePoint and other Intranet solutions is to have the ability to target content to a dynamic audience of users and similarly secure information based on dynamic rules.

Traditionally we have done content targeting with Audiences in SharePoint. An Audience is a dynamic set of users compiled, usually once a day, and at compile time, the Audience rules are evaluated. A SharePoint Audience is used to target information but cannot be used to protect content. Microsoft 365 Groups are powered by Azure Active Directory and support something called Dynamic Membership.

This enables group membership and content or collections within the Intranet to be secured based on dynamic rules and not just based on traditional group membership - a powerful innovation and pattern for security that is enabled based on the integration between Microsoft 365 and Azure Active Directory.

To learn more about this feature, be sure to read this article on using attributes to create advanced rules.

4.14.15. Support & Escalation

Microsoft provides support for Microsoft 365. There are also premier support options for Microsoft 365. Lastly, you can pay vendors (like 2toLead – that's us!) to provide additional support and troubleshooting, and issue resolution around Microsoft 365 issues.

An initial support request can be made in two ways. Save time by starting your service request online in the Microsoft 365 admin center or call in. Get the support phone number for your country or region.

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The initial support path will connect you with a support engineer who can assist callers with basic end-user features and admin scenarios. You may probably need to escalate your support request sometimes until you get a sufficiently senior engineer.

What we have found is that these senior-level engineers are quite capable. They have been open to communicating directly, which has often helped us rapidly understand customer-specific issues and the best solution(s).

When you interact with a support engineer, note that there are a few ways to expedite support escalation to get you a senior-level engineer.

- You can use premier support options for Microsoft 365.
- You can work with a partner (like 2toLead) who has access to escalated support paths.
- You can ask the engineer to escalate you. One technique for this is to request a business impact statement when you have a critical impact on your business (as this leads rapidly to the escalation of an issue).

4.14.16. Privacy & Regulatory Issues

Some privacy-related sub-topics can be relevant when planning a Microsoft 365 Intranet. The legal and regulatory needs of an organization can be complex and often vary based on organizational needs.

As you are probably aware, the strict requirements of North American and international data protection laws and their national implementations are difficult to reconcile with several aspects of Cloud computing. Particularly problematic aspects related to:

- the cross-border transfer of personal data.
- the very broad definition of personal data and the potentially very wide definition of sensitive personal data.
- the reduced level of control that customers can exercise due to the decentralized approach and the dependency on the service provider.

You will want to consider some things when exploring Microsoft 365 with your organization for powering your Intranet. Keep in mind that even in a Hybrid state with SharePoint 2016 or SharePoint 2019, if you are unifying the index, your content will be contained in Microsoft Microsoft 365 datacenter(s).

Most of these considerations are part of a broader analysis of privacy in Microsoft 365. Looking at this from an intranet perspective should help simplify the conversation as many issues get more complex when dealing with mail/Exchange.

You will want to work with Microsoft and a reliable expert to answer questions like:

- How might you migrate to a different provider or back on-premises?
  - This isn't your first choice, but having the ability is important.
  - There are some great options here depending on the content/technology you are looking at migrating. For an Intranet, this is something that, while extremely rare, is done with relative ease using proven third-party tools that have relatively low costs.
- Who owns the data? Who is liable in the case of data loss?
- How is the termination of the contract handled? What happens to the data?
  - Keep in mind that SharePoint online provides encryption of the data. Additionally, Microsoft has disclosed that they intend to provide customers the ability to 'bring their key', enabling more options around who can 'effectively see the data.'
- What laws are different based on various jurisdictions on access to data for your organization?
- How are the data centers secured? What policies are in place?
- What compliance auditing does Microsoft support?
- How would server seizure be handled, and what are the implications for all parties involved?

Microsoft Compliance & Privacy Policies

Microsoft 365 is a multi-tenant service (meaning your data is present on some of the same infrastructures as other Microsoft customers). Microsoft 365 is verified to meet requirements specified in ISO 27001, EU Model clauses, HIPAA BAA, and FISMA. All of those have privacy rules that Microsoft must follow and indicate that Microsoft is making a considerable investment continuously in compliance and privacy. For a comprehensive view of the privacy policies Microsoft 365 follows, you should review the [Microsoft 365 trust center](#) and request the latest audit reports as needed from your Microsoft team.

In short, Microsoft provides an extremely strong privacy policy, and at last count, there are over 300 people focused on data privacy, including Software Engineers, Scientists, IT Pros, Marketing and Lawyers at Microsoft. So, they probably have better privacy protection than many organizations concerned with privacy regulations and rules. There is a significant benefit

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gained from Microsoft taking on the auditing and compliance costs as they relate to some of these kinds of challenges.

4.14.17. Encryption & Bring Your Key

While your data is encrypted at rest automatically in Microsoft 365, you can further encrypt content with Azure Information Protection (AIP).

Azure Information Protection (sometimes referred to as AIP) is a cloud-based solution that helps an organization classify, label, and protect its documents and emails. This can be done automatically by administrators who define rules and conditions manually by users or a combination where users are given recommendations.

The protection technology uses Azure Rights Management (often abbreviated to Azure RMS). This technology is integrated with other Microsoft cloud services and applications, such as Microsoft 365 and Azure Active Directory. It can also be used with your line-of-business applications and information protection solutions from software vendors, whether these applications and solutions are on-premises or in the cloud.

This protection technology uses encryption, identity, and authorization policies. Similar to the applied labels, protection that is applied by using Rights Management stays with the documents and emails, independently of the location—inside or outside your organization, networks, file servers, and applications. This information protection solution keeps you in control of your data, even when shared with other people.

For example, you can configure a report document or sales forecast spreadsheet so that it can be accessed only by people in your organization and control whether that document can be edited or restricted to read-only or prevent it from being printed. You can configure emails similarly and prevent them from being forwarded or preventing the use of the Reply All option.

These protection settings can be part of your label configuration so that users both classify and protect documents and emails by merely applying a label. However, the same protection settings can also be used by applications and services that support protection, but not labeling. For these applications and services, the protection settings become available as Rights Management templates.

You can also control the overall tenant key that you use for this. Managing your tenant key is also referred to as bring your own key, or BYOK.

The Azure Information Protection tenant key is a root key for your organization. Other keys can be derived from this root key, such as user keys, computer keys, and document encryption keys. Whenever Azure Information Protection uses these keys for your organization, they cryptographically chain to your Azure Information Protection tenant key.

There is a lot of confusion around BYOK, so keep in mind this is for Compliance regulations, additional security, and control over all lifecycle operations. For example, your key must be protected by a hardware security module (HSM).

Remember that through the use of techniques like SharePoint Data Loss Prevention (DLP), Azure Information Protection, and its existing Information Rights Protection capabilities, you could automate the discovery of key privacy data and encrypt it with Rights Protection. This enables deeper security and protection levels beyond the encryption and protection offered at the container level (site, library, tenant-level).

4.14.18. Data Residency

You should understand whether Microsoft 365 is available in the region you plan to host your tenant from. Microsoft provides a data residency option to existing Microsoft 365 customers covered by the datacenter goes listed in the table below.

Customers with billing address in	Previous datacenter geo	New datacenter geo	Geo available since
Japan	Asia/Pacific	Japan	December 2014
Australia, New Zealand, Fiji	Asia/Pacific	Australia	March 2015
India	Asia/Pacific	India	October 2015
Canada	North America	Canada	May 2016
United Kingdom	Europe	United Kingdom	September 2016
South Korea	Asia/Pacific	South Korea	April 2017
France	Europe	France	March 2018

While this may ensure your data is within that region, there is a separate offering that you can pay for from Microsoft to enable multi-geo support and still support data residency requirements. This can ensure OneDrive data or SharePoint data is stored in the appropriate geography. For large-scale global Intranets, this could be a significant benefit worth exploring.

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Whether you are reinvigorating your Microsoft 365 digital workplace or thinking about starting your journey, Microsoft 365 is a surefire way to improve digital communication and collaboration.

Microsoft 365 out of the box is already a massive step in the right direction, but the advantages can be astronomical with the proper guidance. We would love to be the consultants who help guide you to your optimal digital workplace. Our team is ready to show you that you will love the way we work. Together.

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5. RECOMMENDED NEXT STEPS

Many organizations are shifting towards a more connected, engaged, and innovative workforce. This is made possible by investing in and enabling your workforce with digital workplace technologies and a modern Intranet experience.

Some businesses have a plan to enable this through various enterprise technology investments and organizational initiatives. However, engaging the workforce can take years and may be seen as a future initiative for some organizations. When so many organizations are firefighting or reactively responding to employee needs, it can be difficult to provide employees with the kind of Intranet experience that enables that workforce to succeed.

As an example, see the diagram below, which might be a high-level representation of an organization's workforce goals for upcoming years.

Supported
Focus on supporting the workforce through firefighting and often reactive one way communications.

Enabled
Focus on enabling the workforce through modern, mobile, engaging and available anywhere at anytime experiences.

Engaged
Focus on engaging the workforce through pro-active, personalized and engaging communication that emphasizes two way discussion and sharing, enterprise social integration, analytics, and insights.

Optimized
Focus on optimizing the workforce through business and technology innovation (especially around integration, automation, and artificial intelligence).

One of the primary benefits of Microsoft 365 as a proven digital workplace technology is that it can help accelerate and enable (with relatively low cost) the kind of digital experiences that modern users need. Instead of engagement and innovation being future goals for the business, we have found the deployment and adoption of Microsoft 365 and a modern Intranet. Adopting them can shift the above timeline to months or quarters instead of taking entire years to accomplish the key technology changes and user behaviour transformations needed.

The intranet is at the epicenter of many organizations, where employees can get company news and information and search for people and content.

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Together we can make the intranet a more personalized experience, where users need it when users need it. Spanning on-premises and Microsoft 365, the mobile and intelligent intranet brings together the productivity of SharePoint team sites, Microsoft Teams, the reach of Yammer, and the mission criticality of your most important business applications. All of this is done while being accessible from your desktop and your mobile phone. Lastly, Microsoft 365 powered Intranets are powered by the Microsoft Graph, so information finds your users instead of your users finding information.

Meeting modern workforce needs today is challenging. Keeping up with the demand and the needs of your future workforce is often seen as impossible.

An Intranet powered by Microsoft 365 or implemented in Microsoft 365 allows you to take advantage of the many related digital workplace enhancements Microsoft continually rolls out.

It's not just that you have a cloud-powered Intranet. It's that you have an Intranet that leverages, integrates, and uses as much of what Microsoft provides as possible so that your Intranet remains continually up to date and able to take advantage of the continued innovation Microsoft produces.

Not only is it possible to embrace Intranets on Microsoft 365, but with the guidance in this document or a trusted partner, you should be able to do it in less time and with less effort than almost any previously successful Intranet initiative you have undertaken.

The timing couldn't be better for your organization to begin the shift or further embrace Microsoft 365.

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6. SOURCES AND RESOURCES

We leverage our many years of expertise to put together these whitepapers. We have learned from our awarded-efforts and alongside our friends in the Microsoft 365 community. We like to highlight both in the section below.

6.1. Our Whitepapers & Related Resources

A few of our popular (and comprehensive) whitepapers:

SharePoint Migration

This 70+ page whitepaper has over 100 different questions that your organization should be able to answer, your migration vendor should be able to answer, and your migration partner should be able to answer, along with essential insights you should consider.

Core Whitepaper Topics

- o   Business Drivers For Migration
- o   Migration Planning, Migration Strategy & Migration Roadmap Planning
- o   Risks To Success

External Sharing With Office 365: What You Need To Know

This 30+ page whitepaper outlines all of the key decisions and how to make them when it comes to enabling external sharing in Office 365 and when/where you may want to configure or extend those capabilities.

What to expect

- o   External Sharing Decisions & Guidance
- o   External Sharing & External User Roadmap

"When to Use What" In Office 365

This 70+ page whitepaper is a guide to providing the right kind of enterprise user guidance for Office 365.

What to expect

- o   Which Tool When: Options, Scenario Recommendations & Examples

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Measuring the Business Impact & ROI of Office 365

This [60+ page whitepaper](#) outlines many key considerations around how to measure the impact Office 365 has on a business while also outlining how Office 365 provides effective reporting capabilities today.

What to expect

- o Understanding & Aligning Business Objectives
- o Business Impact & ROI By Office 365 Capability Mapping
- o Business Impact & ROI Calculation & Measurement Examples

Driving Office 365 Adoption & Usage: What You Need to Know

This [70+ page whitepaper](#) outlines all of the key considerations when planning and improving Office 365 technology and end-user adoption.

What to expect

- o Driving Adoption Best Practices
- o Comprehensive Guidance On Building An Effective Adoption Campaign
- o Adoption Activities Checklist

Many other great resources and samples can be found and are regularly posted on our resource site at http://Office365Resources.com.

6.2. Recommended Industry Perspectives

There are great reports and articles on what's new in Intranets, what is innovative, and what makes for an award-winning Intranet. Are you looking for more interesting perspectives on what makes a good Intranet? Be sure to check out the latest trends in popular annual reports like [Nielsen Norman report on Intranet design](#), [Step Two's report on Intranet Innovations,](#) which is well worth reading. We are humbled to have brought together a team of Neilson Norman, Step Two, and various other award winners, along with other incredible industry professionals.

Tipping our hat to other industry experts

As we mentioned, we have also learned alongside some talented experts that we have crossed paths with on more than one occasion in the community in general or at the many Microsoft 365 events globally. We would like to shine a light on them here.

Susan Hanley

"Sue is a recognized expert in the design, development, and implementation of successful portal solutions, with a specialization in Microsoft SharePoint. Since 2015, Sue has been recognized as a Microsoft MVP for Office Apps and Services. She is a frequent writer and speaker on the topic of building effective collaborative portals, portal governance, user adoption, and information architecture, as well as building communities of practice and measuring the value of knowledge management investments."

Michal Pisarek

"Michal Pisarek, CEO of Orchestry Software, is a Microsoft SharePoint MVP, an award that is given to experts in the Microsoft SharePoint community for sharing their passion, technical expertise, and real-world knowledge. Acknowledged as a thought leader in the SharePoint space, he is a frequent speaker at many international events and has been referenced in publications and presentations by organizations such as Gartner and StepTwo."

Joanne C Klein

A key area Joanne focuses on "… is the Microsoft 365 tools built to help organizations protect, retain, and secure their unstructured content now being produced at an exponential rate. This is an important shift for organizations and their information workers to make in today's modern, digital workplace."

Vlad Catrinescu

"Vlad is also a Microsoft Most Valuable Professional (MVP) since 2013 and has his own blog at https://VladTalksTech.com. He also shares his knowledge by speaking at conferences around the globe and at local community events. Vlad is often featured as an expert on other industry-related websites and blogs."

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7. About 2toLead

2toLead has been labeled as a generous Microsoft consulting company by its clients and employees. 2toLead employs trusted, passionate and experienced consultants who work hard to solve the most challenging business and technology problems that face our clients.

Awarded Experience, Here to Help

Whether you are reinvigorating your Microsoft 365 digital workplace or thinking about starting your journey, Microsoft 365 is a sure-fire way to improve digital communication and collaboration.

Microsoft 365 out of the box is already a massive step in the right direction, but the advantages can be astronomical with the proper guidance. We would love to be the consultants who help guide you to your optimal digital workplace. Our team is ready to show you that "*You will love the way we work.* ***Together.***"

Top 3 Ways 2toLead Helps Customers

INCREASE ADOPTION by going far beyond just deploying things right and ensure your organization is being pro-active in getting the maximum value out of your technology investments.

IMPROVE EXPERIENCES & ENGAGEMENT by understanding where, how, and why users interact with your business while building world-class portals, social networks, and websites that your customers, partners and users love.

LEVERAGE THE CLOUD to reduce costs, improve business agility and capabilities inside and outside of your organization by leveraging cloud technology like Office 365 and Azure.

For more information:

- Visit our website at www.2toLead.com
- Follow us on LinkedIn
- Like us on Facebook
- Follow us on Twitter @2toLead

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Kanwal Khipple

Kanwal, Founder & CEO of 2toLead, is a leading User Experience expert within the SharePoint industry, with experience in building award-winning portals and solutions that take advantage of Microsoft's Cloud platform (SharePoint, Microsoft 365 & Azure). Kanwal's drive for success as the Creative and Technical Lead on projects has garnered him as a recipient of the Neilson Norman award for Top 10 Intranets (2014 & 2015).

Kanwal's passion lies in continuing to push for user experience innovation when redesigning intranets for the majority of the largest brands in the world. He continues to preach on the importance of designing with usability as the primary focus. Kanwal's thirst to share knowledge has made him a prominent figure within the SharePoint community. Because of his passion and involvement in many community-driven events, including launching successful user groups in Canada and the USA, Kanwal has been recognized as a SharePoint MVP by Microsoft (2009 to 2020) and as a Microsoft 365 MVP (2014-2021). He's also co-authored a book on Pro SharePoint 2013 and Responsive Web Development http://amzn.to/sp2013rwd

Feel free to reach out to him if you'd like to discuss your project, want to run an idea by him, or just want to reach out to a friendly technologist.

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RICHARD HARBRIDGE

Richard is the Chief Technology Officer and an owner at 2toLead. Richard works as a trusted advisor with hundreds of organizations, helping them understand their current needs, future needs, and actions they should take to grow and achieve their bold ambitions.

Richard remains hands-on in his work and has led, architected, and implemented hundreds of business and technology solutions that have helped organizations transform - digitally and organizationally. Richard has a passion for assisting organizations in achieving more, whether it is helping an organization build beautiful websites to support great content and social strategy or help an organization leverage emerging cloud and mobile technology to better service their members or the communities they serve.

Richard is an author and an internationally recognized expert in Microsoft technology, marketing, and professional services. As a sought-after speaker, Richard has often had the opportunity to share his insights, experiences, and advice on branding, partner management, social networking, collaboration, ROI, technology/process adoption, and business development at numerous industry events worldwide. When not speaking at industry events, Richard works with Microsoft, partners, and customers as an advisor to business and technology, and serves on multiple committees, leads user groups, and is a Board Member of the Microsoft Community Leadership Board.

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DAVID FRANCOEUR

David, Digital Workplace Practice Lead at 2toLead, is a leader and innovator in the Digital Workplace space with a track record of designing award-winning portals and solutions that take advantage of Microsoft's Cloud platform (SharePoint, Microsoft 365 & Azure).

David shares his expertise via speaking engagements and written publications where his perspective allows him to blend his strengths in user experience and design with deep technical expertise. Most recently, David has been grateful to be named a recipient of the Neilson Norman award for Top 10 Intranets (2020) and the Diamond Award from the CUNA Council (2018).

Staying abreast of industry trends, best practices, platform capabilities in a constantly evolving cloud environment, David leverages his practical experience spanning industries and corporations from startups to Fortune 500 companies, to tailor recommendations to meet evolving user needs. With a real passion for delivering experiences that are both robust and flexible, David is deeply motivated to build new things that make the workplace, and more importantly its stakeholders, more effective. He firmly believes that while tools can go a long way, but implementations tend to fail without research, analysis, strategy, and training. An analytical thinker with roots in the study of History, David has experience in both public and private sectors, including roles as an architect and principal consultant at both product and service-oriented consulting firms. Bringing the necessary skills and invaluable experience to the table, David strives to bridge the gap between people and technology.

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JUST THE BEGINNING

We have **helped over 100 organizations** build stronger Intranets and Internal Communications.

With the guidance of our **Multiple Microsoft MVPs & Neilson Norman Award Winners**, we would love to show you how we can elevate your Intranet and Digital Workplace.

Your journey to a better digital workplace starts with a **Free 2-Hour Assessment**, with no obligations or commitments, of your digital workplace.

THE FIRST STEP TO A BETTER INTRANET

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