

Virtual Teams

High Performance
Best Practices with
Microsoft 365



Project Management 365: Platforms and Practices for Enterprise-Wide High Performance Teams

Accelerated by the pandemic remote, virtual working has become the norm for many organizations.

This presents many challenges including cultural and technological, but if addressed correctly can unlock high performance team capabilities: new, more efficient and collaborative ways of working.

In [this article](#) MIT explores these challenges, identifying best practices that not only support remote team working but in a way where they outperform traditional office-based ones.

The authors identify that yes by default, teams that work in close proximity perform better than those that are remotely distributed due to the face to face human factors that improve communication and collaboration **-but-** when specific apps and tools are applied to systematize high performance behaviours, Virtual Teams perform better.

This is because by their nature distributed teams are inherently more diverse, calling upon members from nationalities and cultures from across the world, which when united via these high performance practices combine to achieve a much more powerful collective than with less diverse groups that rely on accidental improvements arising from close proximity only.

Microsoft 365 offers the ideal suite of tools that can achieve this paradigm, as it provides the building blocks for global, remote team collaboration, and further integrated into this suite are apps that can define, implement and measure the high performance practices.

Agile Enterprise 365

Before diving into the details of the 365 app suite it's essential to establish an Operating Model that will guide how they are used. As the MIT article highlights the critical dynamic that determines high performance teams are the tools and processes that enables them to work in specific ways that achieve this.

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Teams don't operate in isolation, their purpose is to fulfill a larger organizational objective, and equally they are made up of individuals whose sole actions determine the effectiveness of the team.

Therefore what's needed is a holistic, closed loop system, one that reflects these three distinct dimensions, cascading down from the most senior executive level that sets strategy, through team management that translates this into measurable goals and then down to the specific individuals tasks and action that work towards achieving those goals.

Critically the closed loop is achieved by a bi-directional flow, where there is also an upward feedback on progress that informs management and executives such that they reshape their strategy in real-time accordingly, and then again, cascade down those adjusted targets.

There are best practice models that can be called upon to understand and apply the right structures at each level. Synthesizing these different best practice sets into one system and implementing them via 365 apps defines Agile Enterprise 365.

Executive: Agile Transformation Office (ATO)

- Set the overall strategy.
- Define the organizational structure and culture required to achieve that strategy.

This [McKinsey article](#) describes the 'Agile Transformation Office'. An ATO shapes and manages the transformation, brings the full organization along, and—perhaps most important—helps it achieve lasting cultural change.

The ATO is not meant to be an oversight board or another layer of bureaucracy. Instead, it is embedded within the existing structure, pulling in the right business expertise to realize tangible outcomes.

Project Management 365: Platforms and Practices for Enterprise-Wide High Performance Teams

Management: OKRs

- Break down the strategy into specific Goals.
- Monitor and measure progress towards those Goals.

‘OKRs’: **Objectives and Key Results**, is a goal-setting framework used by individuals, teams, and organizations to define measurable goals and track their outcomes. The development of OKR is generally attributed to Andrew Grove who introduced the approach to Intel in the 1970s.

In this guide we explain how 365 tools including Project, Planner, Teams and Viva Goals can be synthesized together and utilized to implement a system of OKRs to enable a framework for organization-wide high performance enterprise agility.

Team GTD

- Enable teams to synthesize their knowledge, collaboration and real-time status to achieve those goals.
- Provide individuals with the tools to maximize their own personal productivity, that operate as a component part of that team context.

‘Getting Things Done’ (GTD) is a personal productivity system developed by David Allen and published in a book of the same name.

As the name defines David Allen’s personal productivity system ‘Getting Things Done’ is intended for an individual to use to boost their own work effectiveness. However it’s especially powerful when implemented across the enterprise, utilizing functions that smoothly synthesize tasks from the project and team to the individual, and back again.

Project Management 365: Platforms and Practices for Enterprise-Wide High Performance Teams

In this guide we document how to implement the methodology across the Microsoft 365 apps, to greatly improve your own work productivity, and critically, how to link it to enterprise level systems so that work flows naturally from projects to people, aka 'Getting Things Done Enterprise'.

Project Management 365: Platforms and Practices for Enterprise-Wide High Performance Teams

Microsoft Viva is a powerful suite of tools designed to enhance productivity, foster employee engagement, and create a digital workplace that drives mission and alignment within organizations.

Viva is an integrated employee experience platform built within Microsoft 365 and Microsoft Teams that gives you the ability to support connection, insight, purpose, and growth in your organization using your existing infrastructure.

The shift to hybrid workplaces has made it harder for employees to connect, engage, and build communities within their internal network. With its comprehensive features and seamless integration with Microsoft 365, Viva offers a holistic solution to help businesses achieve their goals.

Viva Modules

The core ideal is that Viva offers a catalogue of plugin modules and components that can be activated to tailor your Teams environment with specific functionality suitable to your collaboration needs.

Project Management 365: Platforms and Practices for Enterprise-Wide High Performance Teams

- **Enable Collaboration:** [Connections](#) brings your organization's internal resources into Microsoft Teams where it is easier to share, collaborate, and chat all in one place. Discover and search relevant content, sites, and news from across your organization right from the Team's app bar.
- **Engage Employees:** [Engage](#) connects everyone at your organization through employee communities and conversations and [Glint](#) offers organization-wide surveys to better understand the voice of the employee.
- **Performance Management:** [Insights](#) empowers your organization with data-driven, actionable insights to increase productivity and performance, and [Goals](#) provides an objectives and key results (OKR) management solution that helps you set goals and aligns teams to your organization's strategic priorities.
- **Learning and Knowledge Share:** [Learning](#) is your central hub for learning in Teams where you can share, recommend, and learn from content libraries across an organization to empower teams and individuals to make learning a natural part of your day, and [Topics](#) applies AI to empower people with knowledge and expertise in the apps they use every day, and to connect, manage, and protect content across systems and teams.

Appropriately the pricing is modular. You can purchase individual Viva modules like Goals or the full suite.

As part of their strategy to enhance all 365 products with AI there is also now a [Viva Copilot](#), which helps leaders create compelling and inspiring posts from simple prompts or trending topics within workplace communities and storyline conversations.

Project Management 365: Platforms and Practices for Enterprise-Wide High Performance Teams

Drive Mission and Alignment with Microsoft Viva

In today's fast-paced and ever-changing business landscape, organizations need to ensure that their employees are aligned with the company's mission and goals. Microsoft Viva provides a comprehensive solution to drive mission and alignment by enabling seamless communication, collaboration, and knowledge sharing across the organization.

Microsoft Viva offers a comprehensive solution to drive mission and alignment within organizations. By leveraging its powerful features and integrating it into your digital workplace, you can enhance productivity, foster employee engagement, and create a culture of collaboration and knowledge sharing. Implement Microsoft Viva following best practices and unleash its potential to achieve your organization's goals.

Project Management 365: Platforms and Practices for Enterprise-Wide High Performance Teams

The purpose of implementing a program like Project Management 365 is to achieve high performance teams.

Therefore a key requirement is of course the ability to define and measure what constitutes high performance, and also empower staff with the tools to accomplish the stated goals.

This is where the broader 365 suite becomes especially important, most notably offering tools to implement a framework of 'OKRs' - Objectives and Key Results.

Objectives and key results is a goal-setting framework used by individuals, teams, and organizations to define measurable goals and track their outcomes.

As the term suggests this is a simple system of stating what goals the organization wants to achieve, and what project initiatives they need to implement to achieve them, so that they can easily monitor and understand what progress they are making towards them.

Viva Goals

For this Microsoft offers '[Viva Goals](#)', with the critical facet being that this isn't some standalone enterprise application that staff find cumbersome to use and thus counter-intuitive to the objective.

In contrast they offer an approach where the functionality is built directly into the collaboration environment that teams are already using, making it a natural component part of their daily work.

As the Microsoft Mechanics demonstrate in [this video](#) that if you're a manager or a team member, Viva Goals makes it easier to align and stay focused on the strategic priorities of your organization and work together to accelerate progress.

Project Management 365: Platforms and Practices for Enterprise-Wide High Performance Teams

Vetri Vellore, Viva Goals team lead at Microsoft, joins Jeremy Chapman for a closer look at how this brand-new goal setting and management solution helps drive clarity around your objectives and key results, and makes it seamless for teams to track progress against them as they work.

Project, Planner and Teams

Critically Viva Goals also integrates with the Project app, and also with their 'Planner' app, and all of these integrations can be driven from within Teams.

As explained here you can [connect Project to Viva Goals](#), where you can track progress on OKRs and the projects that align to them by leveraging the Project for the web integration with Viva Goals as a single source of truth.

Similarly Planner offers a lightweight Project Management environment, where you can easily set up project structures but without having to go into a full PM mode, such as Kanban Boards to schedule, visualize and manage team tasks, and as it matures to a more complex body of work you can then [migrate it into Project](#).

Learn more about the integration of Viva Goals with Microsoft Project and Microsoft Planner in [this video](#), and how it helps teams align their projects to the organizations' OKRs and increase visibility of progress across stakeholders.

Both [Planner](#) and [Project](#) can be integrated into Teams so that organizing and progressing project tasks are a natural and fluid function of live team work. Furthermore there are features that help individuals better manage their own workload, such as 'Assigned to Me'. You can quickly catch up or stay on top of tasks that you own by identifying recent progress or changes that impact the schedule with [Task History in Project](#).

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When we think of 'Project Management' we tend to picture a complex, industry-specific practice, such as for large construction projects.

However Project Management is actually a universal building block of all organizational work.

Whether it's planning and delivering a marketing event or producing a client proposal, there is a common pattern of team collaboration, task dependencies, risk management and stakeholder engagement, which when managed well produces successful results, and when not, delayed and poor quality deliverables.

So a Project Management capability is critical to the success of any organization. In the case of the sales proposal the speed and quality of the output can be the determining factor in whether that deal is won, or not.

Agile Enterprise 365

Similarly Agile practices are mostly associated with software development, however again they can be generalized and applied to any type of work.

The Project Management Institute explores this [here](#), describing how any type of team can use principles like Backlogs, Scrums, Sprints, User Stories and Continuous Integration to better manage their work. Microsoft defines their Agile Methodology for Projects [here](#).

Project Management 365: Platforms and Practices for Enterprise-Wide High Performance Teams

Thus we can define a high level goal of synthesizing Project Management and Agile practices and applying them wholesale across the entire enterprise, as a formula for enabling high performance teams. Furthermore a common building block for Project Management is simply the effective office communications and collaboration that is universal to all work, such as notifications about the progress and status of project tasks.

Hence why Microsoft 365 is ideal for this whole paradigm, and what we'll be exploring in this guide. 365 offers the mix of both general collaboration tools, like Teams and Sharepoint, as well as specific apps like Project and Planner.

How they all integrate together and enable work techniques like Agile is what defines Project Management 365.

Microsoft Project: Agile, Goals, Workloads, and more

[Microsoft Project](#) is the centerpiece of Project Management 365, providing the specific project functionality, that is enhanced and complemented through the general team collaboration tools like Teams to form the entire practice.

It provides the specific project functionality, like Gantt charts et al, which are then enhanced and complemented through the general team collaboration tools like Teams to form the entire practice.

In [this demo video](#) learn more about the new Project for the web features that will provide agile support, goal tracking, balancing of team workloads, advanced dependencies, conditional coloring, and more.

Project Management 365: Platforms and Practices for Enterprise-Wide High Performance Teams

Some of these features in more detail include:

- **Track team milestones with Goals:** Use Goals in Project to better drive alignment with your team and stakeholders.
- **Manage interconnected tasks with Advanced Dependencies:** See you can manage dependencies and ensure that your project stays on track with Advanced Dependencies in Project.
- **Balance your team's workloads with People view:** See how you can easily assess and rebalance workloads across your team with Project and account for over- or under-allocation, expertise, and preference.
- **Manage an agile project with Sprints:** Learn how to prioritize tasks into time-boxed periods with the Sprints feature in Project.

How to be Agile with Microsoft 365

In [this video](#) Microsoft explain how you can implement Agile practices with Project. Agile Sprints are an essential component of the Agile methodology, a project management approach widely used in software development.

Agile support in Project for the web enables you and your teams to create and prioritize tasks in their backlogs, define sprints and their date boundaries, move tasks between sprints and their respective backlogs, and build reports that include this data.

Project Management 365: Platforms and Practices for Enterprise-Wide High Performance Teams

In Agile, projects are divided into smaller, manageable iterations called sprints. Each sprint typically lasts for a fixed duration, usually two to four weeks, during which a specific set of tasks is completed. An Agile Sprint is a time-boxed iteration where a cross-functional team collaborates to complete a set of prioritized tasks.

It allows teams to focus on delivering a specific increment of work within a fixed timeframe. The work to be completed during a sprint is determined in advance and is based on the project's backlog, which contains a prioritized list of user stories or requirements.

People often find that there are so many different tools, approaches, and versions of technologies that they become overwhelmed with how to make sure they are productive. In [this webinar](#), Advisicon explores tips and tricks that will allow you to be both Agile in your approach to getting work done and avoid duplicating effort across your different tools. In this webinar you will learn:

- Tips and tricks in both Methodology & Tools that support you in delivering more work, faster and more agilely in your day to day work life.
- Agile & Waterfall Project Methodologies with Microsoft 365 tools & templates.

Getting Things Done 365: A Personal Productivity System, for the Enterprise

'Getting Things Done' (GTD) is a personal productivity system developed by David Allen and published in a [book of the same name](#).

GTD is described as a time management system. Allen states "there is an inverse relationship between things on your mind and those things getting done".

The GTD method rests on the idea of moving all items of interest, relevant information, issues, tasks and projects out of one's mind by recording them externally and then breaking them into actionable work items with known time limits.

This allows one's attention to focus on taking action on each task listed in an external record, instead of recalling them intuitively.

In [this video](#) Emelie Lindström describes the David Allen GTD method for beginners, a full summary in only 15 min, covering the five steps of the David Allen GTD system which are Capture, Clarify, Organize, Reflect and Engage. She also goes through the most general parts of the system that you need to include to make your David Allen GTD system functional like the inbox, GTD weekly review, trigger list, waiting for list, next actions list, someday maybe list and more.

Capturing Tasks with To Do

Getting Things Done is a simple but powerful system, built around five core actions of Capture, Clarify, Organize, Review and Engage. The core ethos of the methodology is that you unload all of the tasks and ideas buzzing around in your mind into a system, such that it clears and frees your mind.

Getting Things Done 365: A Personal Productivity System, for the Enterprise

Hence why the first Capture step is so important. When you know that a particular task has been added safely to the system, your mind no longer feels the urge to hang on it like a loose end. When you have repeated this for all possible tasks your mind is free from all possible loose ends and it's like a weight lifted from your shoulders.

In [this video](#) Matt the Collaboration Coach explains how to perform the capture phase using Microsoft 365, demonstrating how to retrieve tasks from the different apps like Outlook and Teams.

From 1m:30s Matt stresses the importance of capturing tasks quickly and easily, as this maximizes the success of your GTD system. He begins to demonstrate how to use Microsoft To Do for this, which is as simple as going to the Tasks section and adding them.

He also highlights how complex tasks can be broken down into a number constituent sub-tasks, and also how you can create your own Task Lists for containing different types of tasks.

At 2m:08s he describes how there is a To Do app for Android, IOS, Mac and Windows, and is available across any browser. Data is stored in 365 so it is synchronized and available whichever you use. Matt sometimes uses his phone to dictate his tasks, a very simple and quick way of capturing tasks.

From 3m:00s Matt then demonstrates how to capture tasks in other apps, like Outlook.

This highlights how 365 is ideal for implementing a system like GTD, with simple but powerful features for boosting your productivity. For example an email can be captured as a task simply by [flagging it](#), which adds it as a task in To Do for you, where you can move it to any of your other task lists. It retains a link to the original email so it opens it back up in Outlook.

Getting Things Done 365: A Personal Productivity System, for the Enterprise

At 4m:00s Matt then moves on to Teams. Like the email flagging feature you can also capture chats as To Do tasks. (This requires the [Task App for Teams](#)). Again you can insert it into any of your task lists, setting it's priority, due date and so forth, and you can add further steps to it.

Set up a Weekly Review

As the name suggests the [Weekly Review](#) function of GTD is where you reflect on the current state of your system, refreshing it to update changes and progress you have made. GTD author David Allen shares his thoughts on what a good GTD Weekly Review is and isn't in [their podcast](#) on the topic, highlighting it is the "critical success factor" in making your GTD practice stick.

Productivity95 reflects on it further in [this detailed article](#) on how to implement it, with further considerations for making it successful by incorporating in other practices, such as 'Life Planning' from the book Living Forward, so that your review is linked to the big and important thinking about your life.

In [this video](#) Collaboration Coach Matt walks through how to use Microsoft Task Manager for your Weekly Review. From 0m:50s he begins to demonstrate using To Do for this, which builds on his [previous video](#) on how to use it for the core task capture and management process.

He creates a new task list called the Weekly Review, adding specific GTD actions such as 'Get Clear', the process of making sure that all loose ends such as paper documents that need actioned (receipts, business cards etc.), as well as clearing your email inbox and your mind!

Getting Things Done 365: A Personal Productivity System, for the Enterprise

At 1m:47s he shows how to schedule this task list as a recurring weekly item, and from 2m:14s he adds another list called 'Get Current', which is a process of reviewing what you did last week and what you plan for next week. This is then sub-divided down into your [Next Actions](#) list, an essential GTD activity, analyzing what tasks are dependent on other people, and is also scheduled a recurring weekly item.

At 3m:23s Matt then starts a 'Get Creative' list, which is for a more open ended personal brainstorm of possible items to work on, what GTD defines as your [Someday Maybe List](#). Another way to think of these is personal '[stretch goals](#)', ie. a way of considering some ambitious targets you may want to set yourself for the coming week.

Matt then moves on to explaining how to run the review, at 4m:20s, where he stresses how importantly you treat it, as if it's a critical meeting with a customer and blocking it in your calendar so you won't be disturbed. He shows how you can use Viva app in Teams to do this.

Getting Things Done, at Enterprise Scale: Linking GTD to Planner, Teams and Outlook

How to link GTD tasks to enterprise level systems so that work flows naturally from projects to people, aka 'Getting Things Done Enterprise'.

As the name defines David Allen's personal productivity system 'Getting Things Done' is intended for an individual to use to boost their own work effectiveness. However it's especially powerful when implemented across the enterprise, utilizing functions that smoothly synthesize tasks from the project and team to the individual, and back again.

Getting Things Done 365: A Personal Productivity System, for the Enterprise

This way work is flowing naturally from the organizational to the person level in the most efficient way, boosting both individual and enterprise productivity simultaneously. I.e. the base unit of organizational productivity is individual productivity, and when the project level systems enable, rather than inhibit, personal effectiveness then the overall enterprise work rate is enhanced.

In the bad old days most corporate workers found project management systems overly bureaucratic, adding more work for them to do and thus perversely acting as a detriment to the success of the project they're trying to manage. In contrast the right combination of 365 tools can better manage work **as a function of** enabling individuals to be more productive, cascading up that improvement into making the projects more effective.

For example in [this video](#) Microsoft demonstrate how to add Planner into Teams (also documented [here](#)) so that it's ultra simple for project tasks to be created, indexed and then assigned to colleagues right from within the environment where you are communicating and collaborating. This assigned task can then be fed into that person's GTD system, as a To Do task.

In [this tutorial](#) Jonathan Edwards expands on this in much more detail, providing a comprehensive explanation and demonstration of how tasks can be synchronized across Planner, Teams and To Do.

Specifically from 2m:55s to 3m:15s he shows how a task created in Planner is automatically routed to him through the 'Assigned to Me' function. Learn more about Assigned to Me in [this one minute Microsoft video](#).

Getting Things Done 365: A Personal Productivity System, for the Enterprise

Once the task has been added in to his To Do list he can then manage as he would any other, utilizing the types of GTD activities carried out in To Do described in the previous articles, thus demonstrating how team level project work can flow smoothly and immediately into the individual GTD level and system.