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Microsoft 365 Deep Dive
Save More Time, Make More Money

Set your browser to
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For interactive polling
and Q & A

Presented By
John H. Higgins, CPA.CITP
Rochester, Michigan

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Learning Goals

- Identify the capabilities of Microsoft 365 that enhance operational efficiency for accounting, tax, and advisory practices.
- Recognize best practices for deploying Microsoft 365 applications, with a focus on optimizing the Teams app for a practice's unique needs.
- Select strategies from a step-by-step guide to implement Microsoft 365 for process documentation, client service improvement, and productivity enhancement

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John H. Higgins, CPA.CITP

Strategic Technology Advisor

john@higginsadvisoryllc.com

- Nationally recognized thought leader, advisor, author and speaker on CPA technology
- Strategic technology advisor to the profession w/ 35+ years of experience
- Founded and sold two CPA technology advisory startups
- Former National Mid-market Technology Partner - BDO
- CPA Practice advisor Top 25 Thought Leader for the CPA profession
- AICPA Business & Industry Hall of Fame Inductee
- Past Chair of the Michigan Association of CPAs
- Passionate advocate for the CPA profession!

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Presentation Outline

- Microsoft 365 Benefits For Your Practice
- The “Big Picture”
- Teams / SharePoint Deep Dive
- Top Initiatives to Implement
- Microsoft 365 Apps Lightning Round
- Copilot Preview
- Wrap-up
- Bonus Material

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MICROSOFT BENEFITS FOR YOUR PRACTICE

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Firm Benefits

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Firm Benefits (continued)

- Enable a hybrid work environment
- Improve process documentation
- Provide a knowledge sharing platform
- Improve meetings management and documentation
- Automate workflows
- Prepare your firm to leverage AI with Copilot

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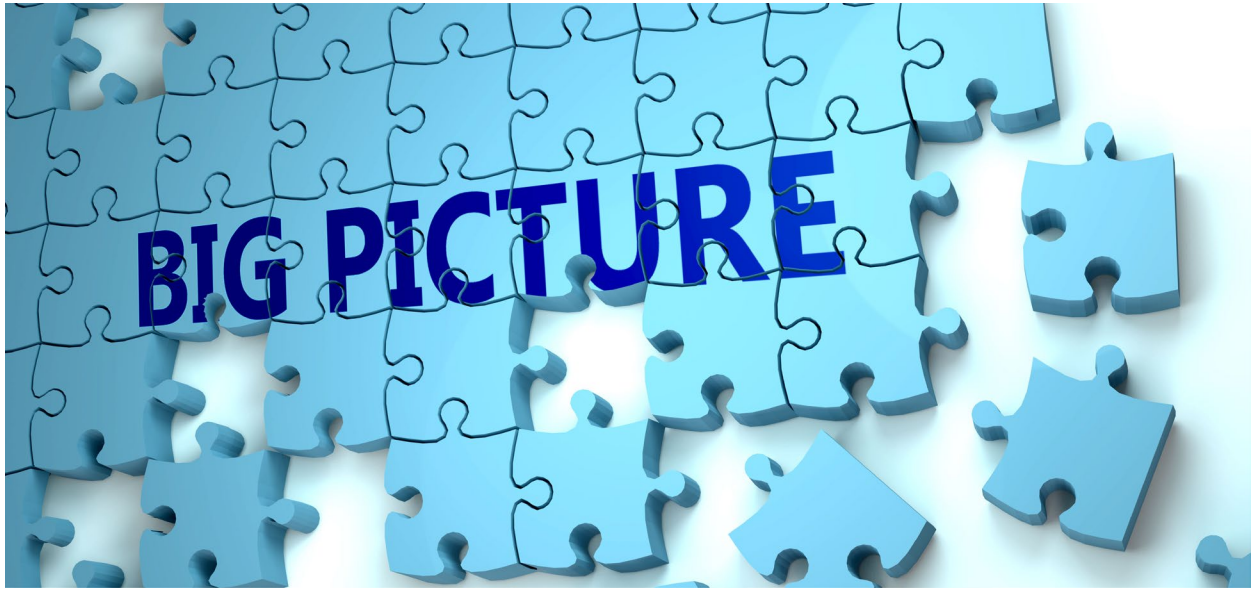
THE “BIG PICTURE”



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Microsoft 365 Features

- Over 25 integrated desktop, mobile and cloud-based applications
- 100% cloud-based infrastructure / data management / data security
- Subscription based licensing model scales up and down
- Perpetual upgrades / enhancements to access state of the art technology
- AI powered with Microsoft 365 Copilot

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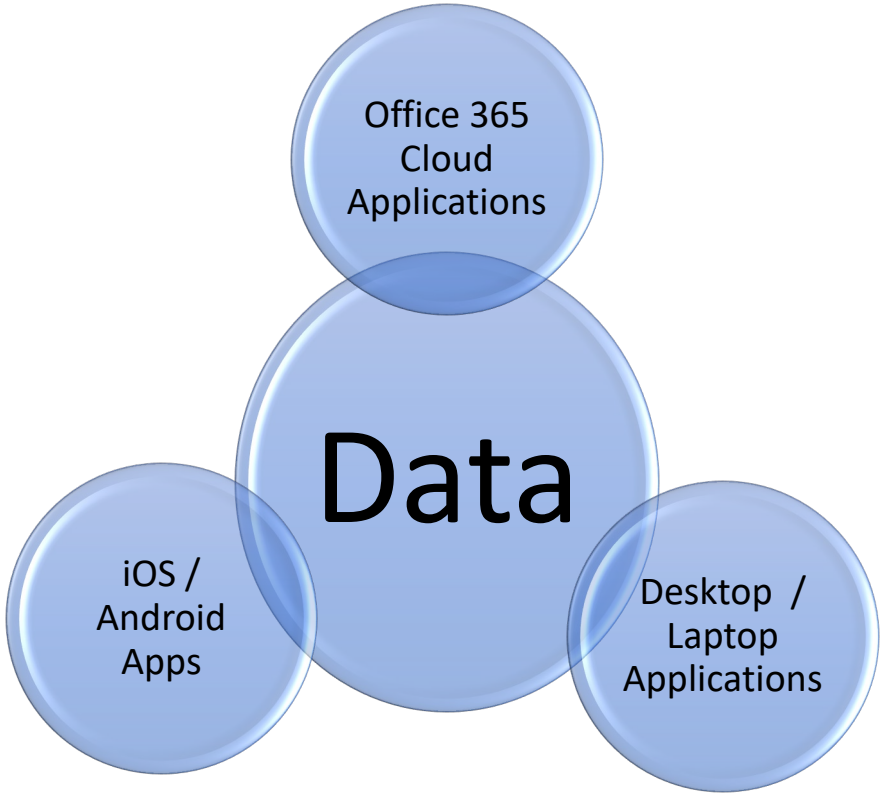
The Microsoft 365 Ecosystem



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Microsoft 365 Application Suite

Traditional Office Desktop Apps

Primary End User Apps

IT Technical Apps

- Admin
- Bookings
- Calendar
- Clipchamp
- Compliance
- Delve
- Excel
- Forms
- Insights
- Lists
- Loop
- OneDrive
- OneNote
- Outlook
- People
- Planner
- Power Apps
- Power Automate
- Power BI Pro
- PowerPoint
- Purview
- Security
- SharePoint
- Stream
- Sway
- Teams
- To-Do
- Viva Insights
- Whiteboard
- Word

AI Add-in

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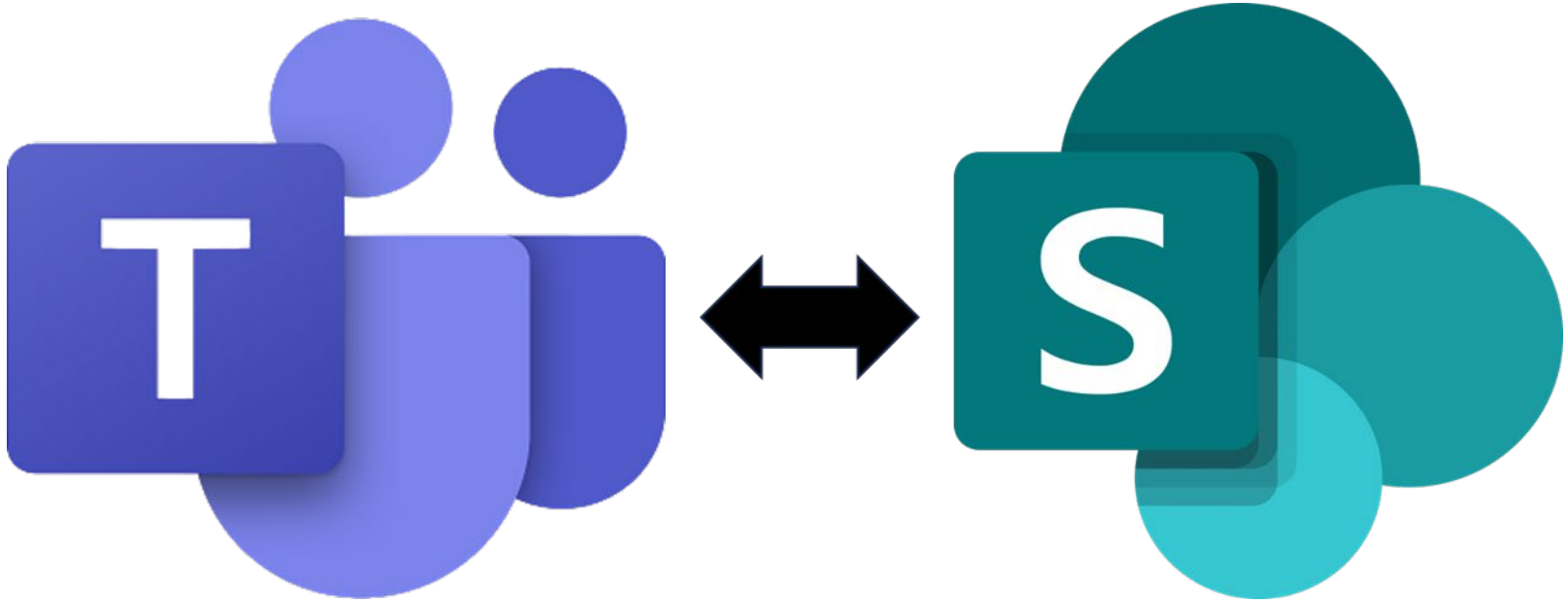
TEAMS / SHAREPOINT DEEP DIVE



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Teams Role in the Microsoft 365 Ecosystem

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Establish Teams as your hub for communications, collaboration and knowledge sharing

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Communication, Collaboration & Knowledge Sharing

- ✓ Central repository for all your conversations
- ✓ Central hub for accessing all your files
- ✓ Launch pad to access all your apps
- ✓ Communications gateway to external parties
- ✓ Email replacement
- ✓ Optimize Microsoft 365 integration value

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Teams Features Review

- Teams & Channels
  - ✓ Posts (conversations)
  - ✓ Files (SharePoint)
  - ✓ Tabs (shortcuts)
- Chats
- Calendar / Meetings
- Calls

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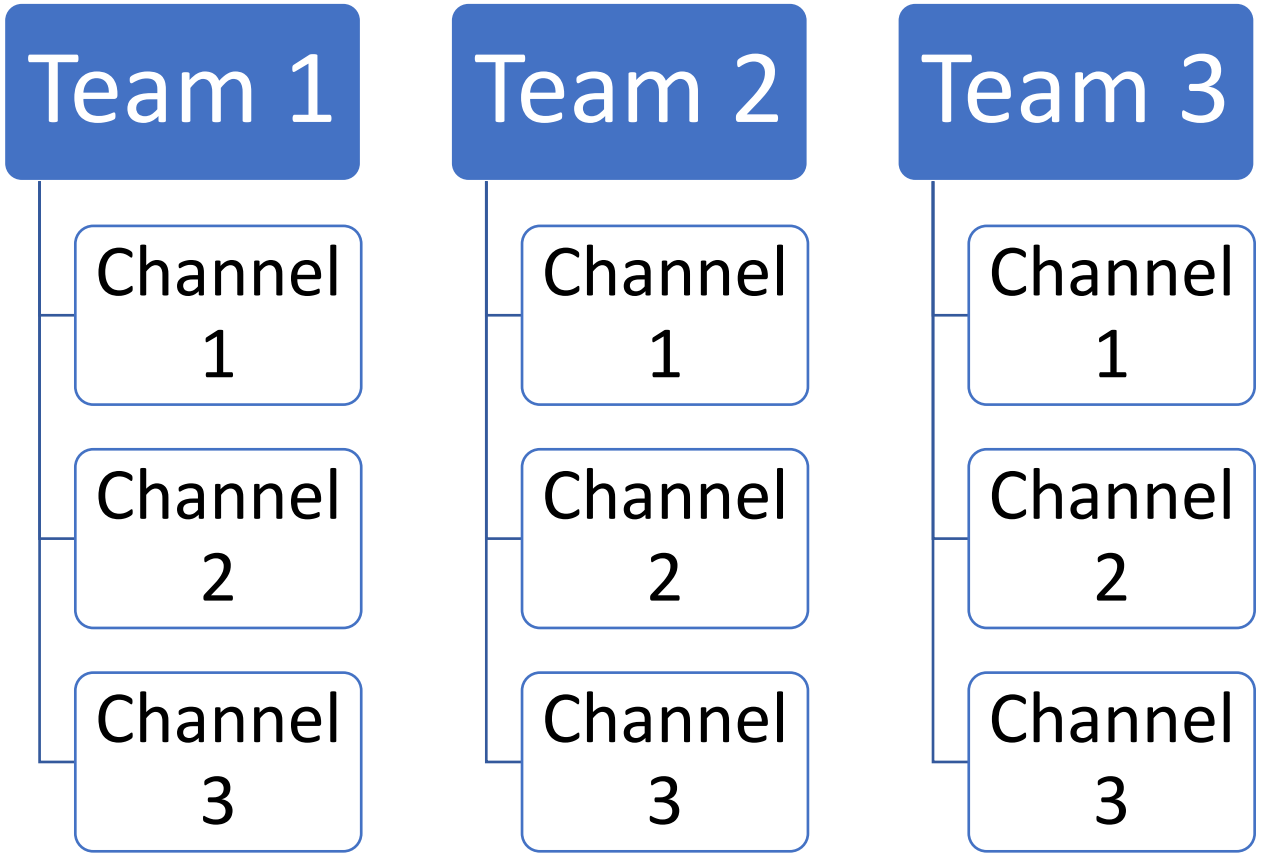
Best Practices for Configuring Your Teams and Channels



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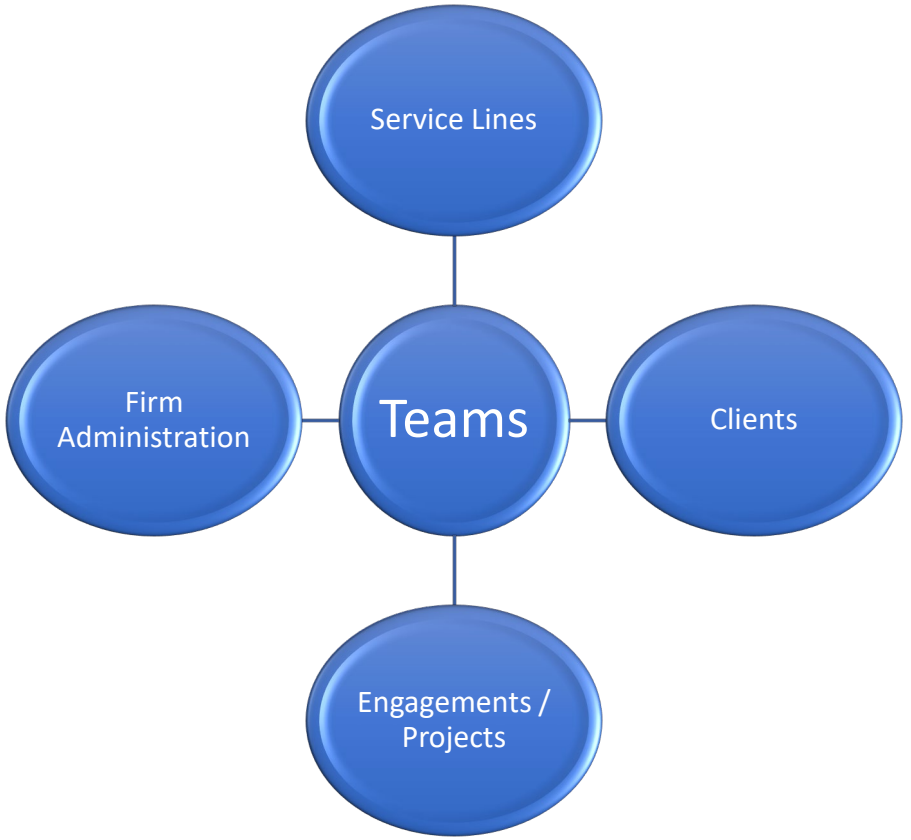
Teams

Establish around activities where groups work together



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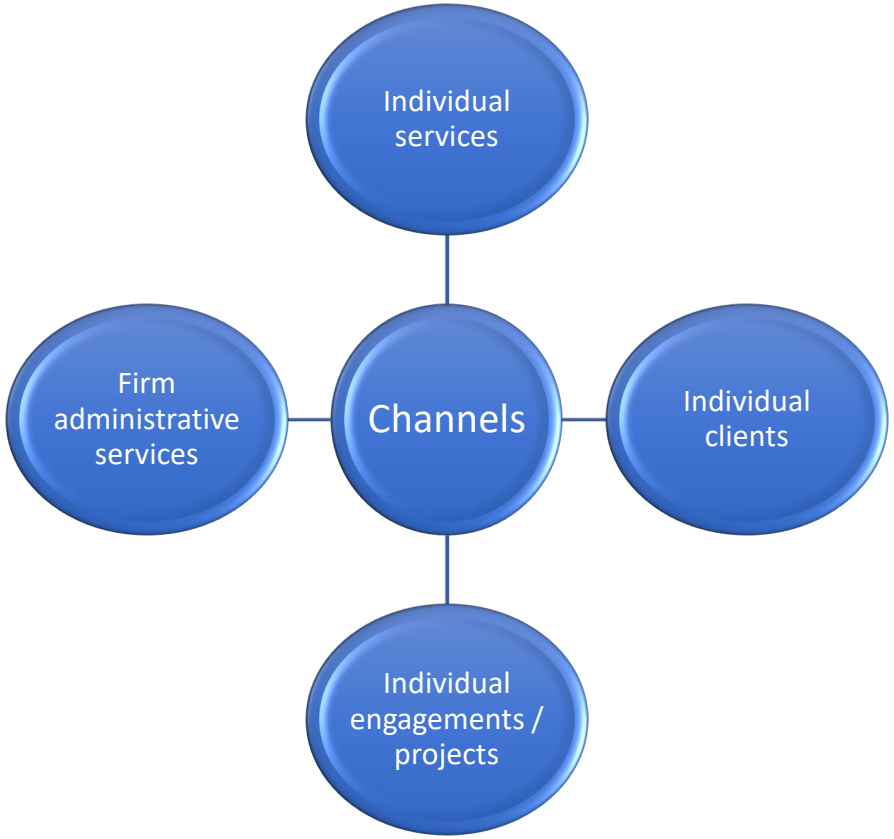
Channels

Subset of a team to organize your content in greater detail



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CPA Firm Example

Team	Channels			
Service Lines	Audit	Accounting	Tax	Advisory
Clients	Client A	Client B	Client C	Client D
Firm Administration	HR	Marketing	Billing	Governance
Technology	Tax Software	Audit Software	Accounting Software	Infrastructure
Vendors	Vendor A	Vendor B	Vendor C	Vendor D
Human Resources	HR Forms	Personnel Policies	Fun Stuff	HR Announcements

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Teams & Channels Setup Best Practice Tips

- ✓ Think of it like establishing a chart of accounts
- ✓ Take time to plan with participation from across the firm
- ✓ Document your plan before configuring
- ✓ Start broadly and evolve to narrower focus
- ✓ Get staff feedback early and often

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SharePoint Overview

- Cloud storage of files and other content for “shared” group access
- OneDrive is a SharePoint site for each user’s personal file storage
- 1 TB of storage provided with tenant subscription

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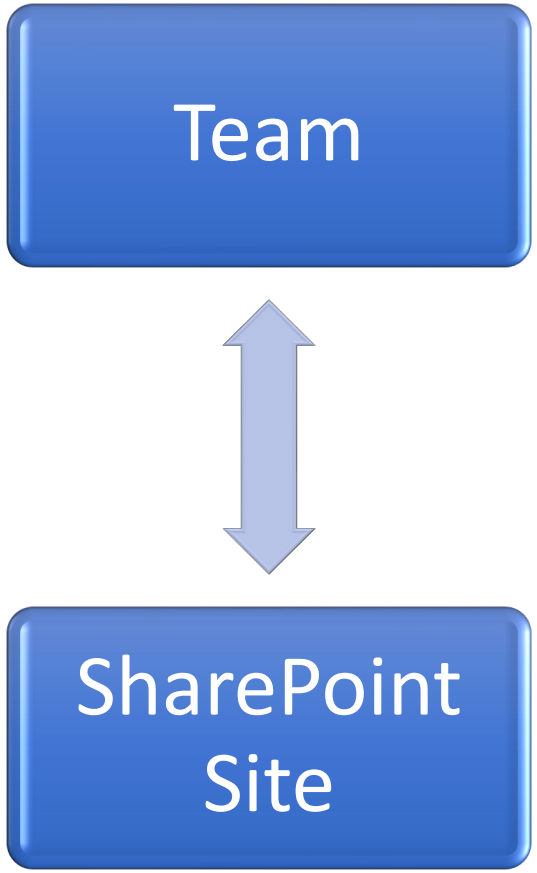
Teams / SharePoint Relationship



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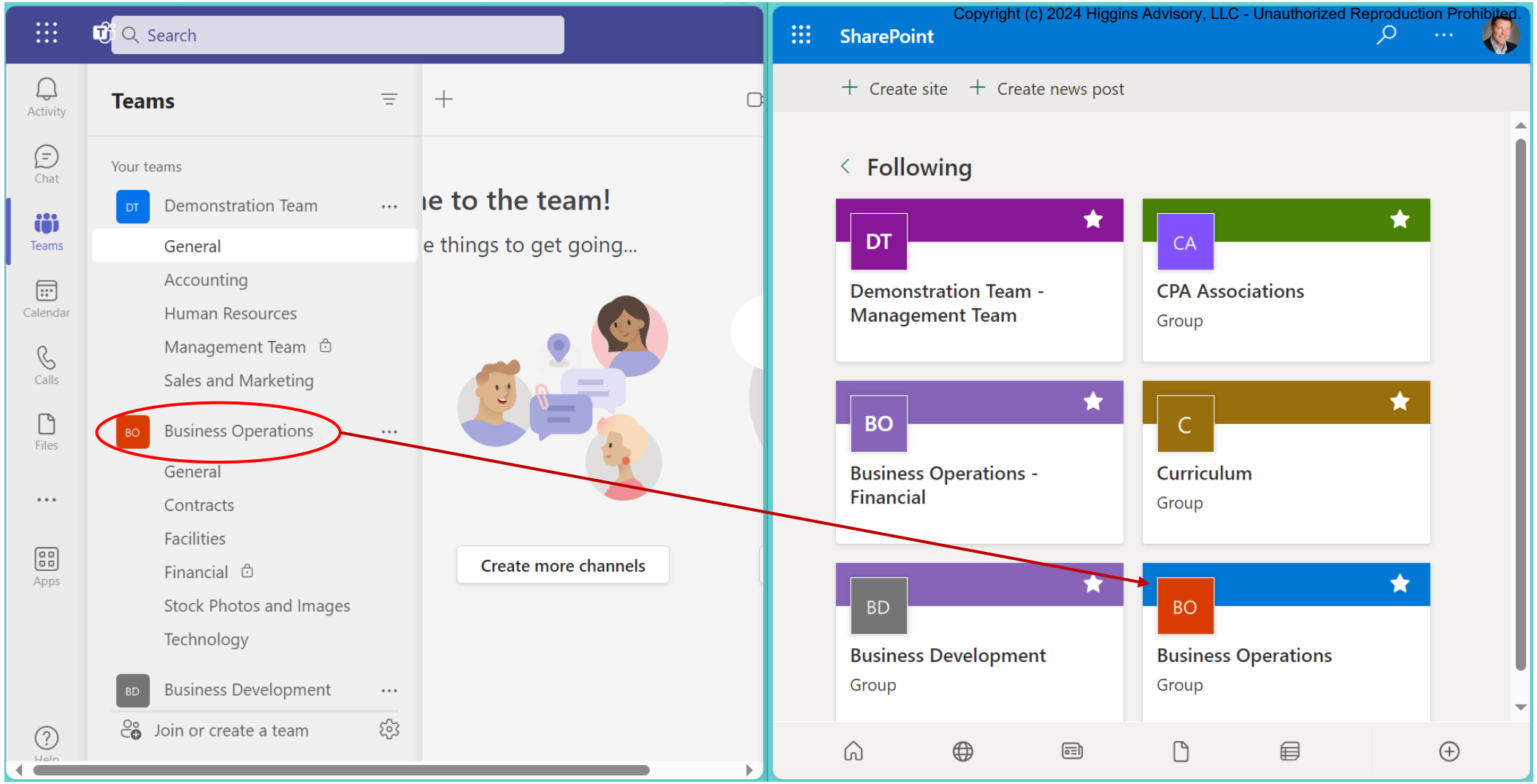

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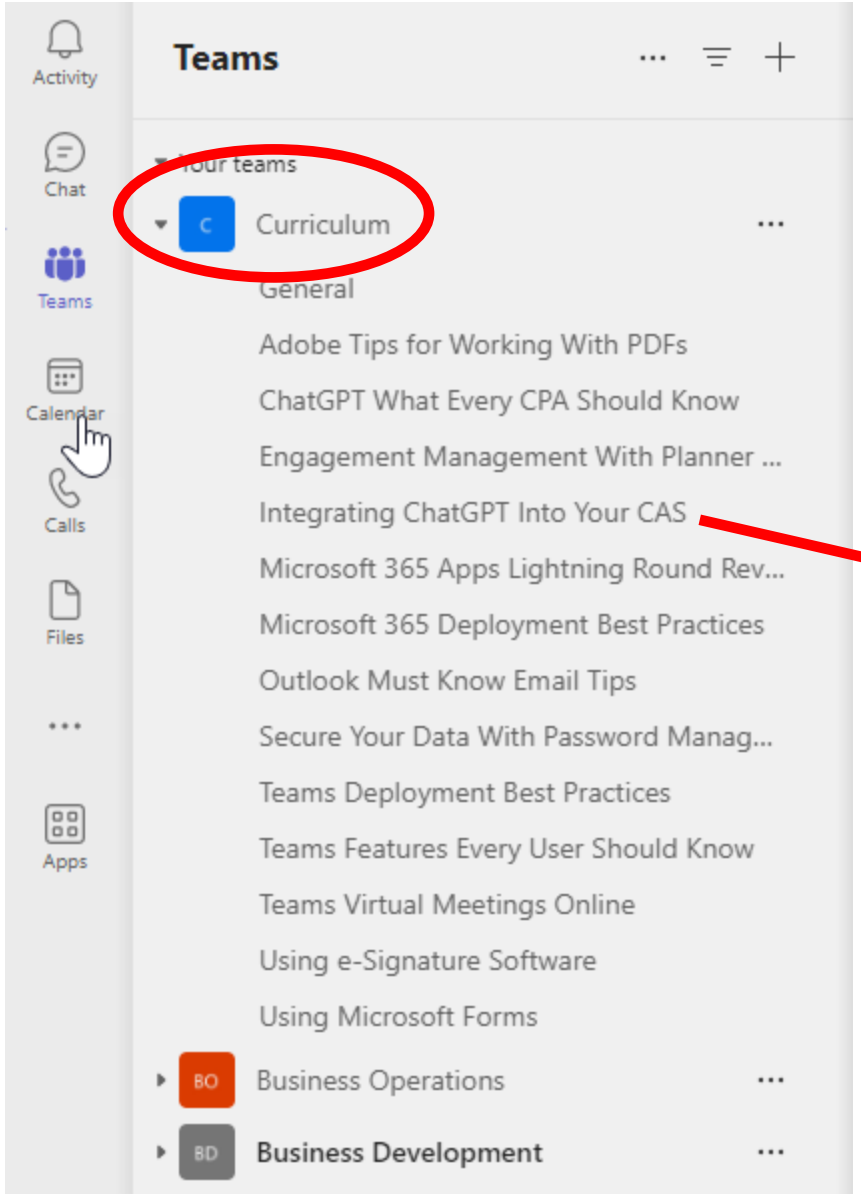

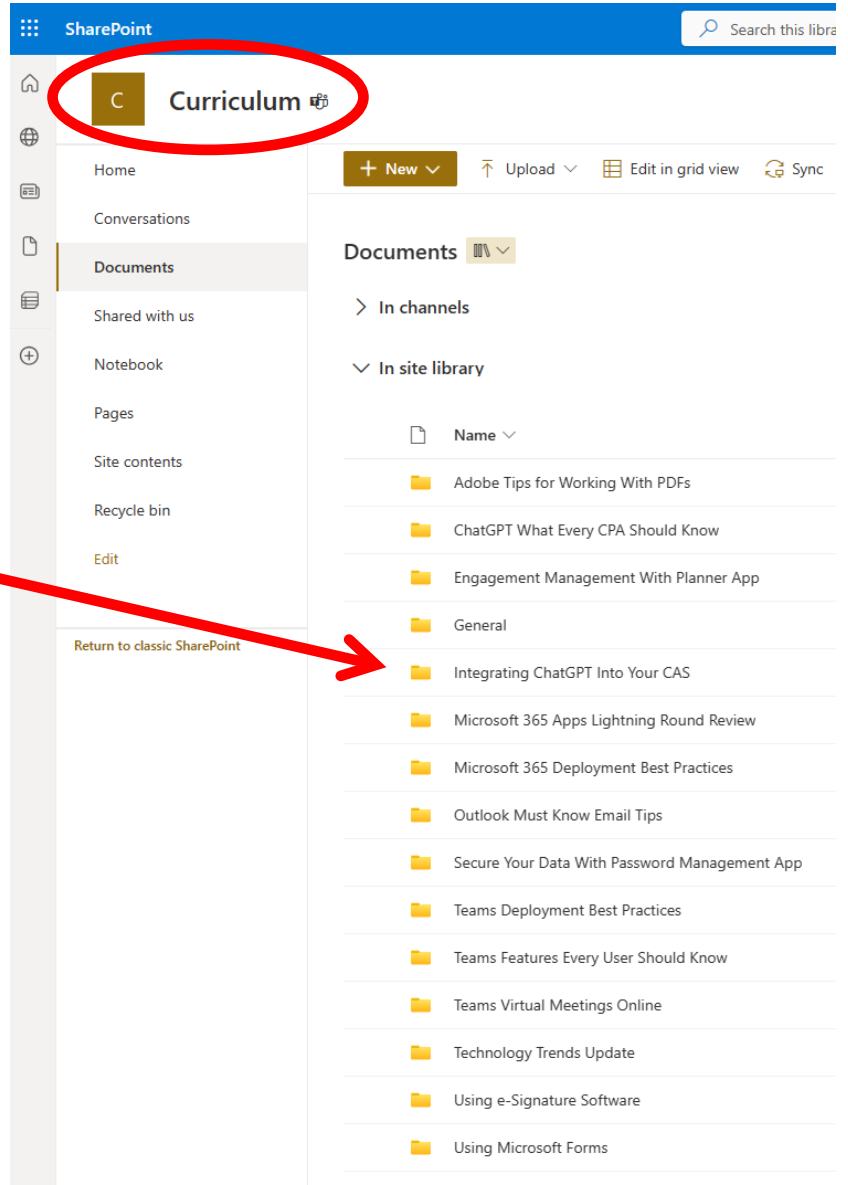

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Things to Know About Teams / SharePoint Integration

- Every team created establishes a corresponding SharePoint site
- Every channel created establishes a corresponding document folder in SharePoint
- Every private channel created establishes a separate SharePoint site for that channel
- Warning – deleting a team deletes the corresponding SharePoint site and all its files, OneNote notebook, Planner plan, Power BI workspace and Stream group and all its files

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USE PRIVATE CHANNELS FOR CONFIDENTIAL COMMUNICATIONS & FILE SHARING

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Private Channel Features

- Accessible by subset of Team members
- Not viewable beyond private channel members
- Creates a separate SharePoint site

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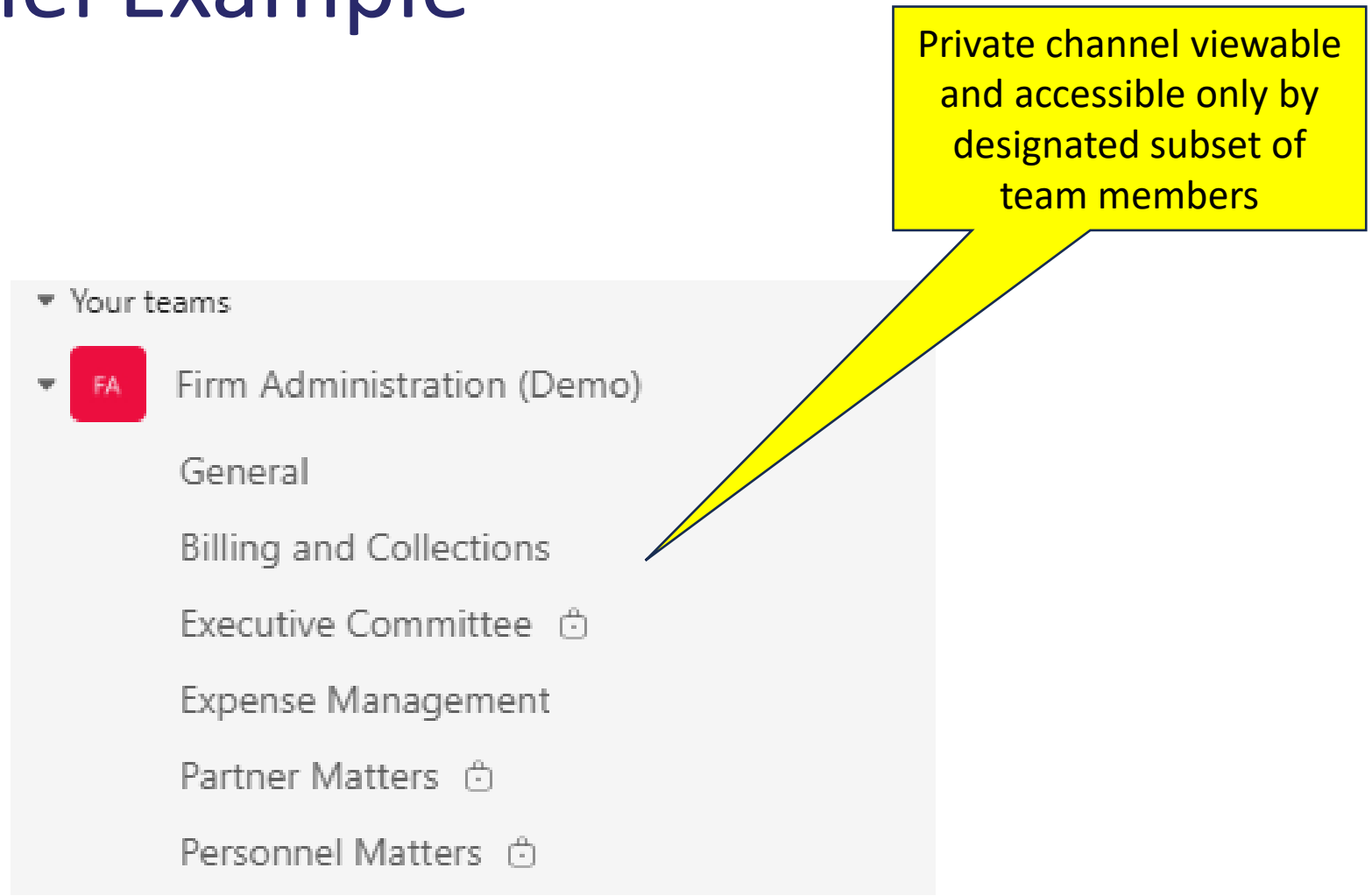
Private Channel Example



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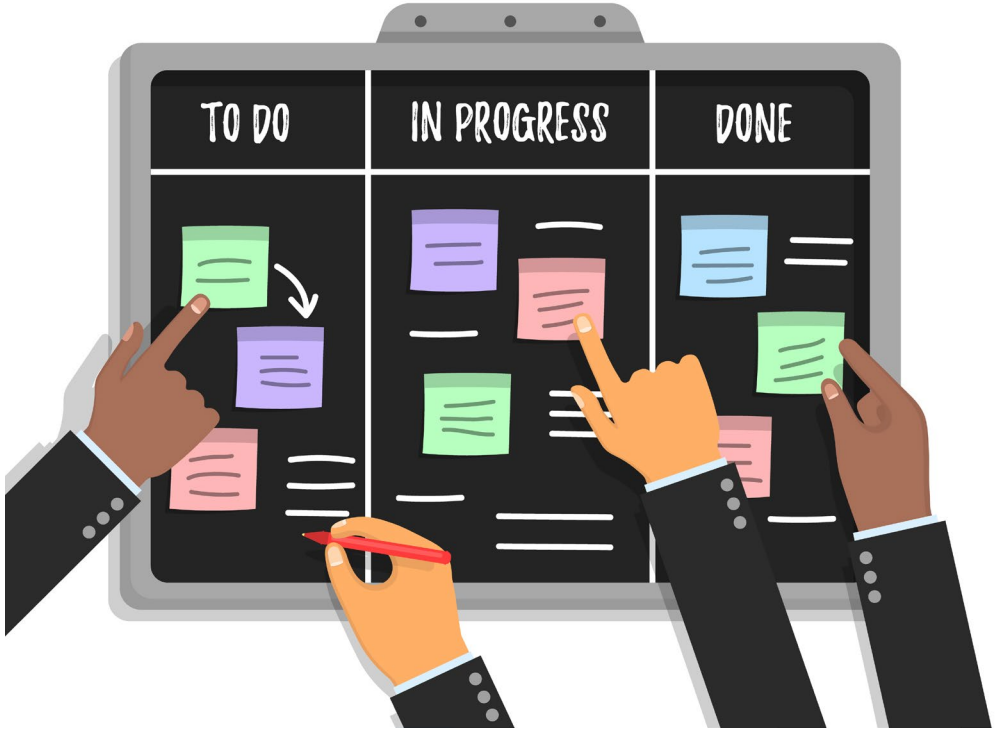
TOP INITIATIVES TO IMPLEMENT



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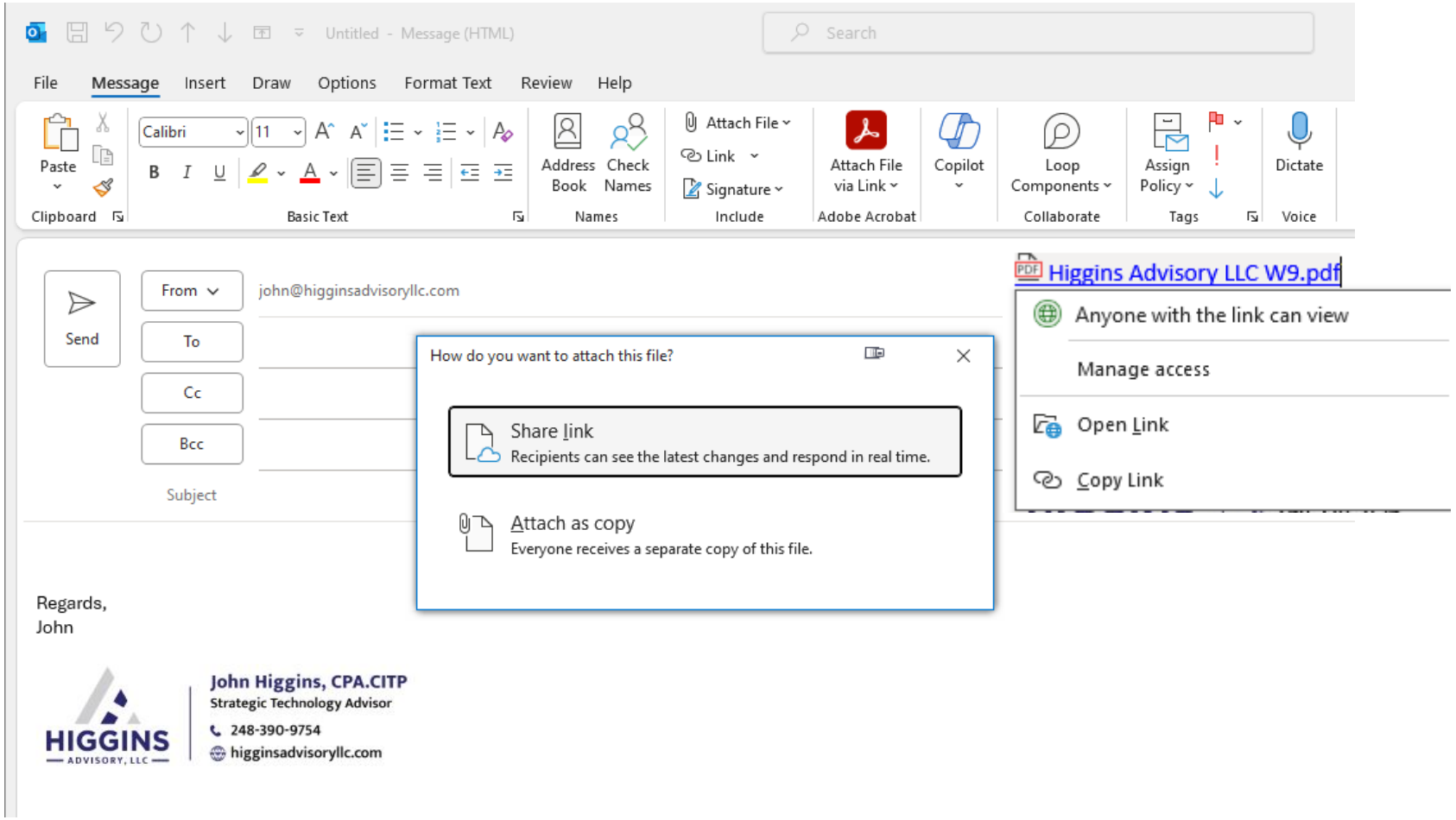
Eliminate Email File Attachments



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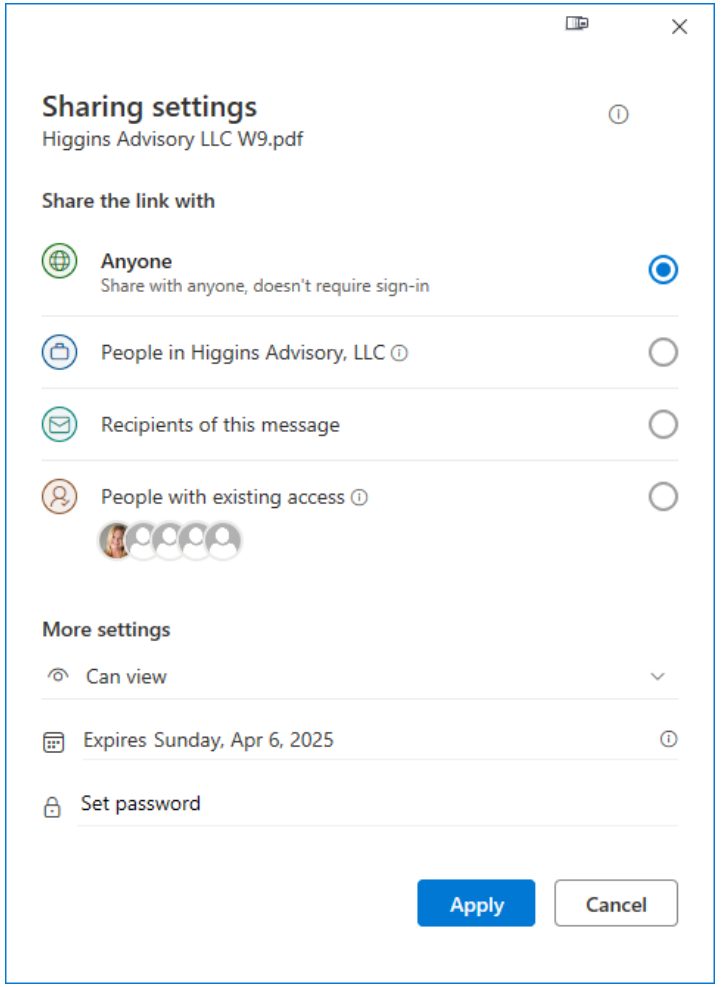
Eliminate Email File Attachments (continued)



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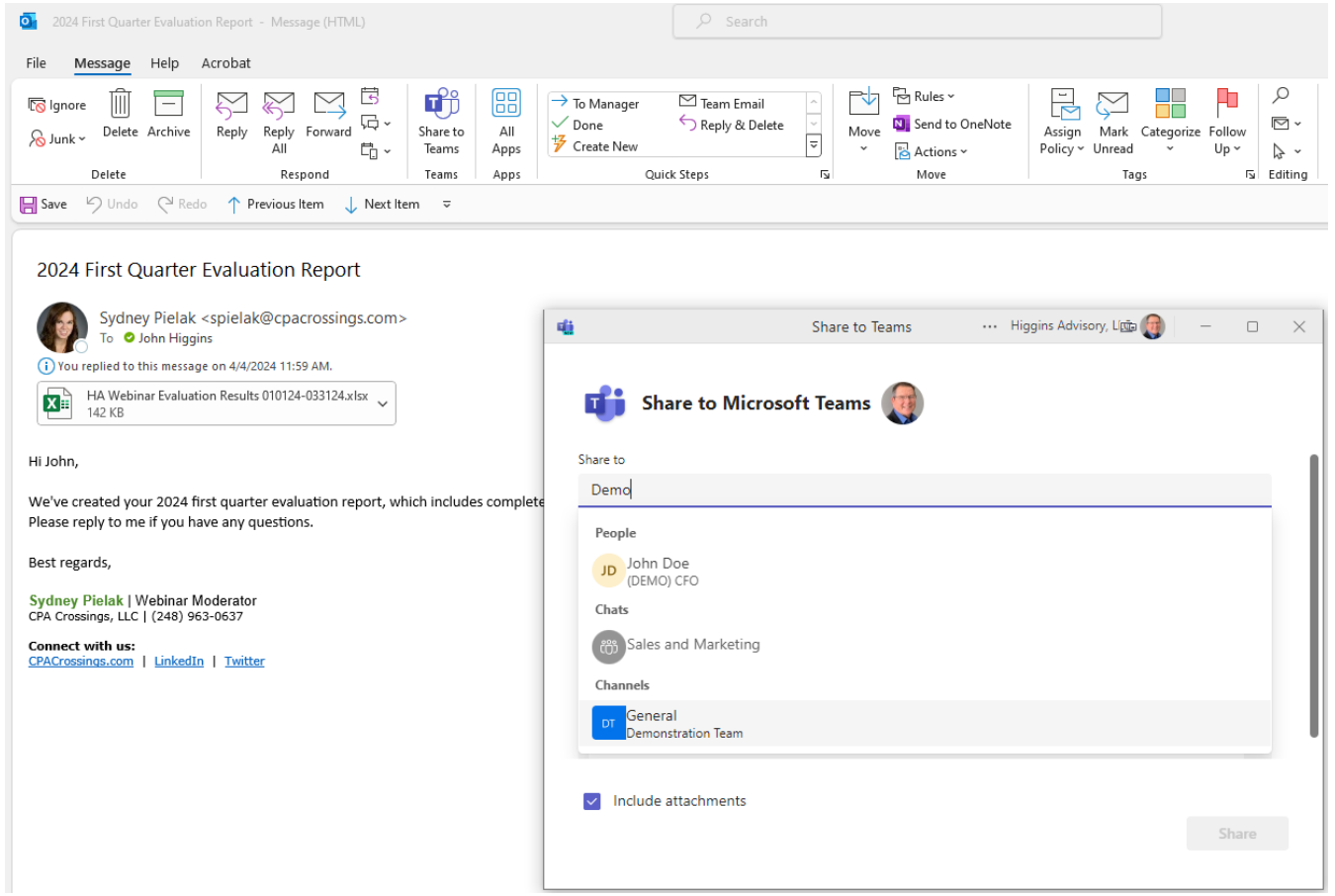
Eliminate Internal Emails



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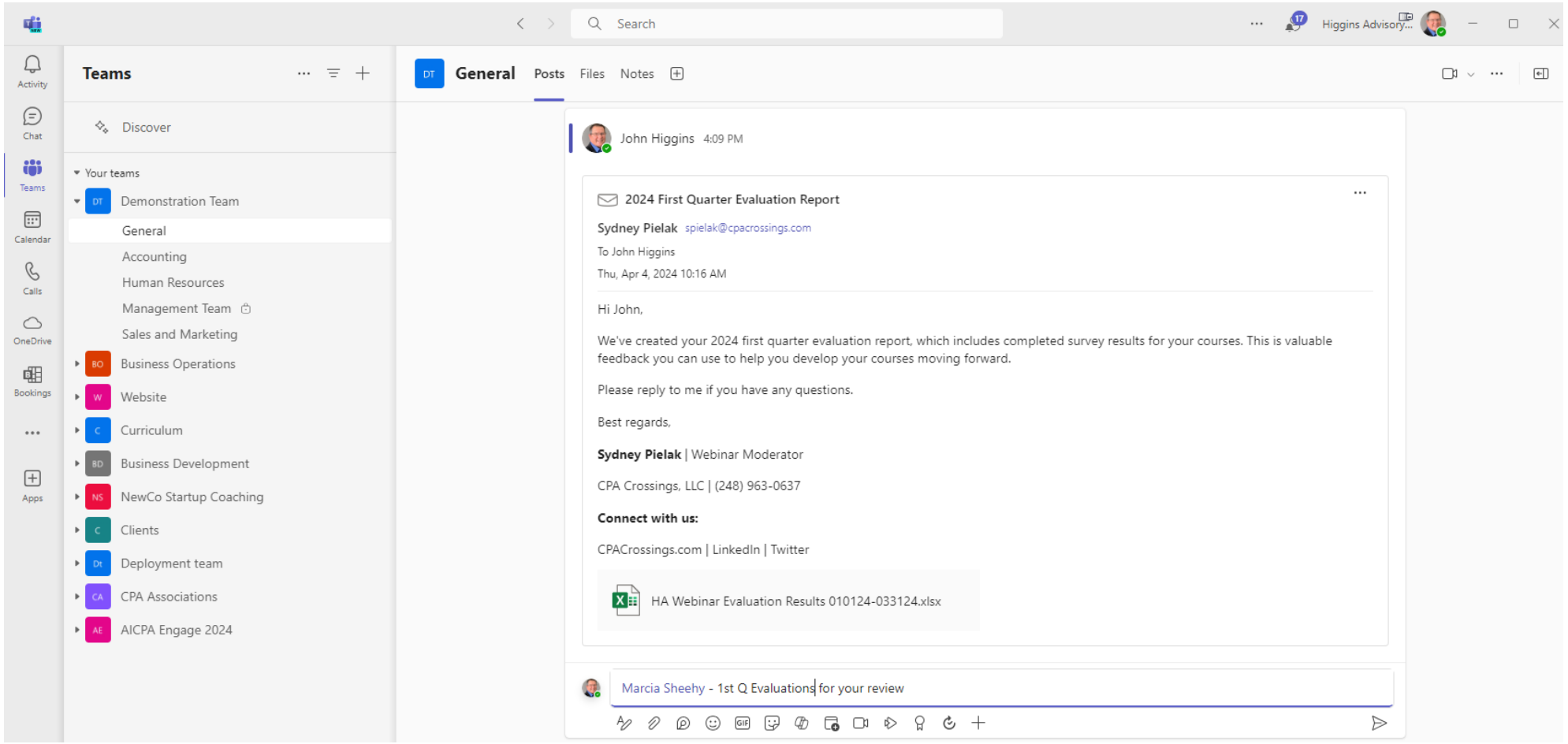

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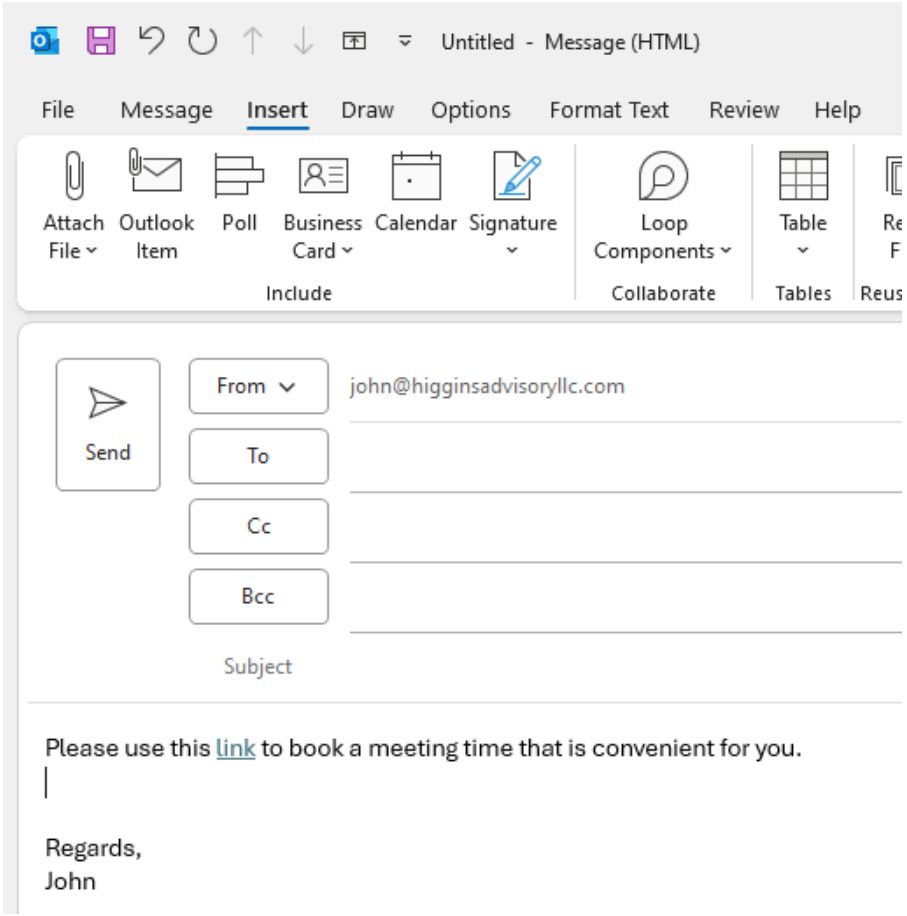
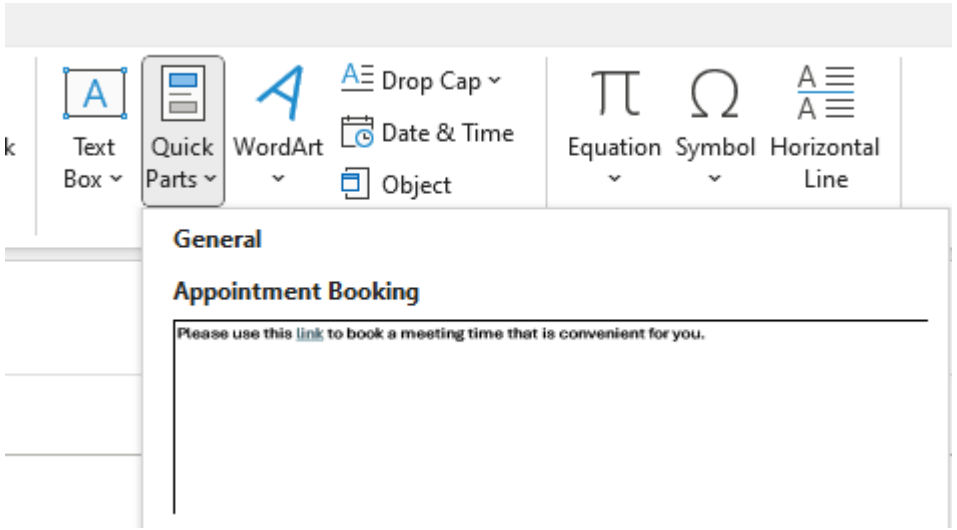
Implement Bookings App with Quick Parts





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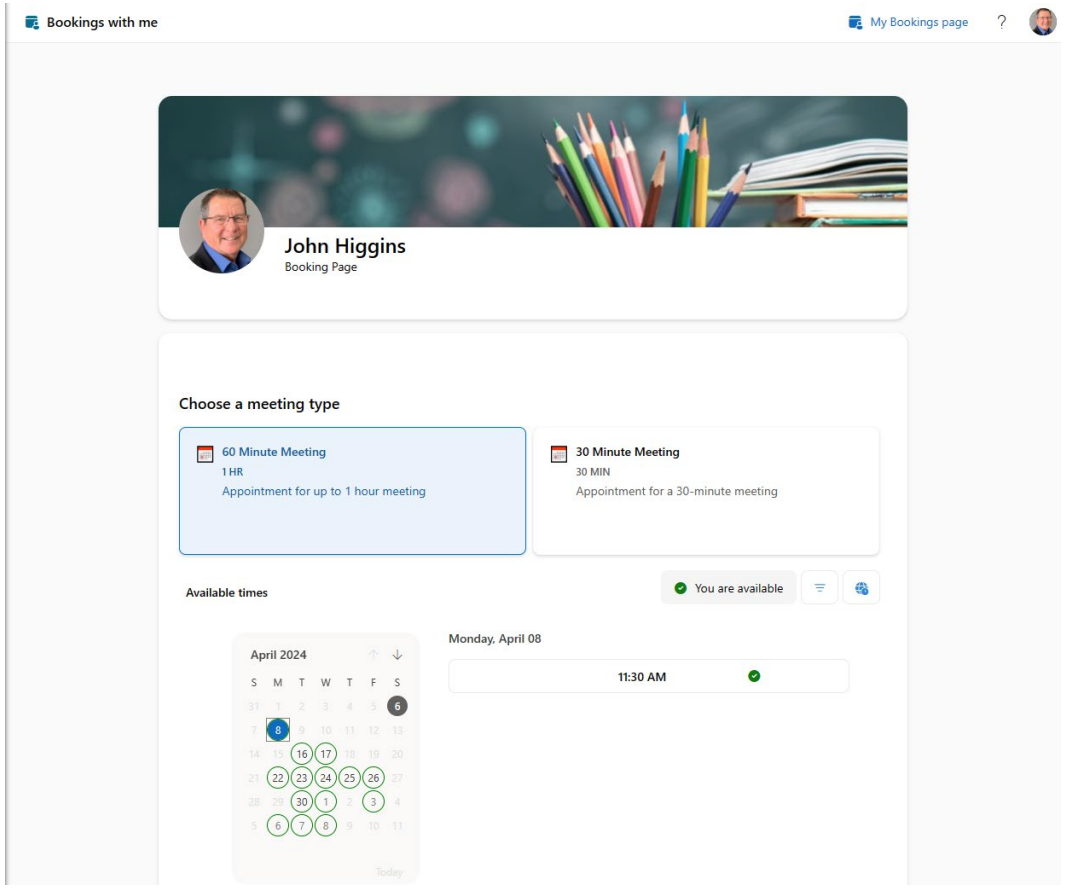
Implement Bookings App (continued)



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Establish Client Portal Model

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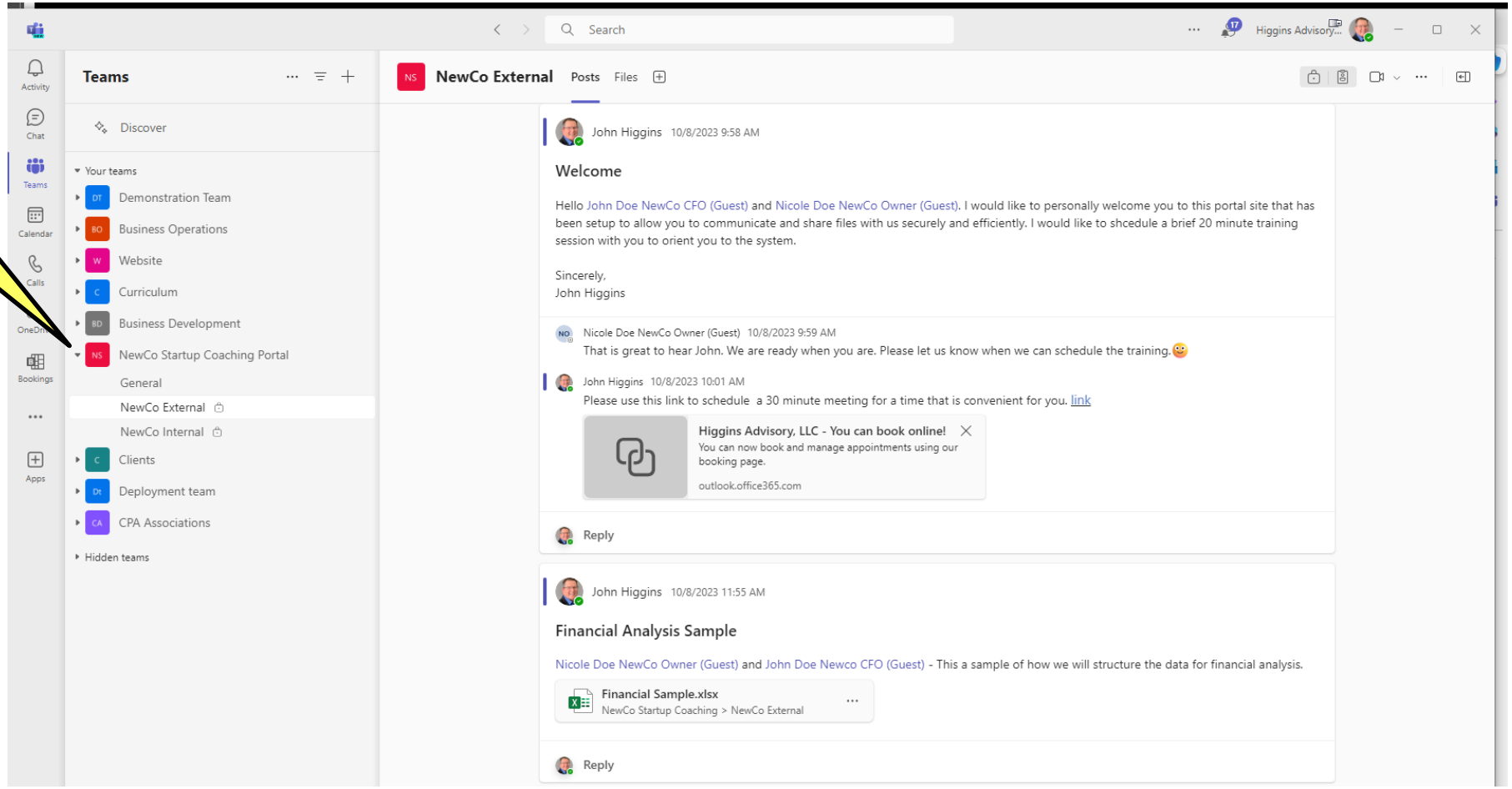
Establish Client Portal Model (continued)

Firm view



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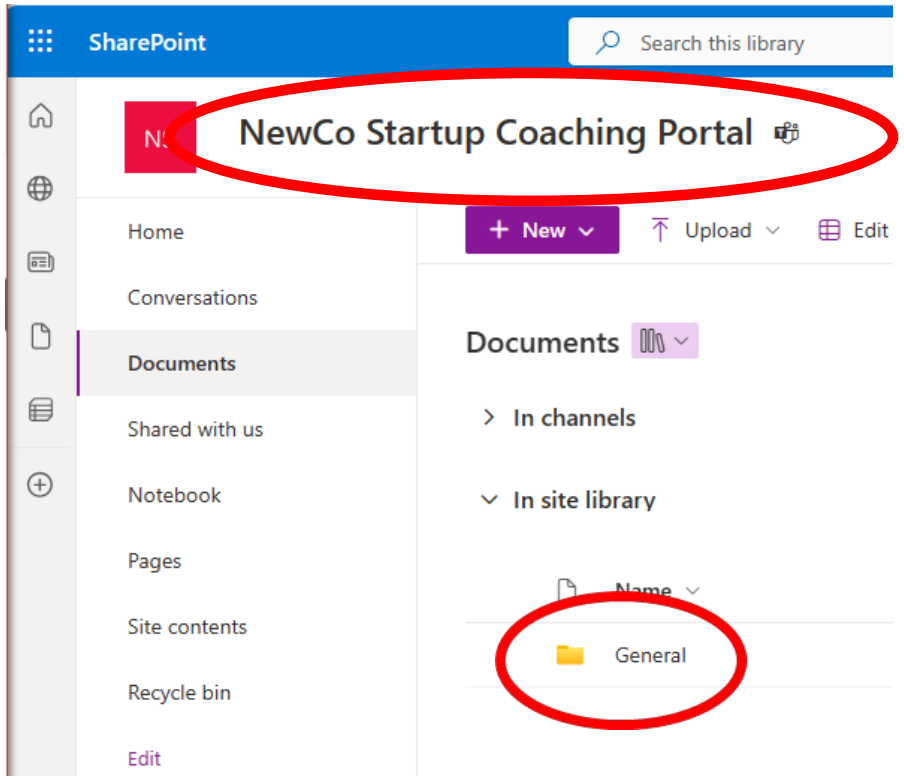
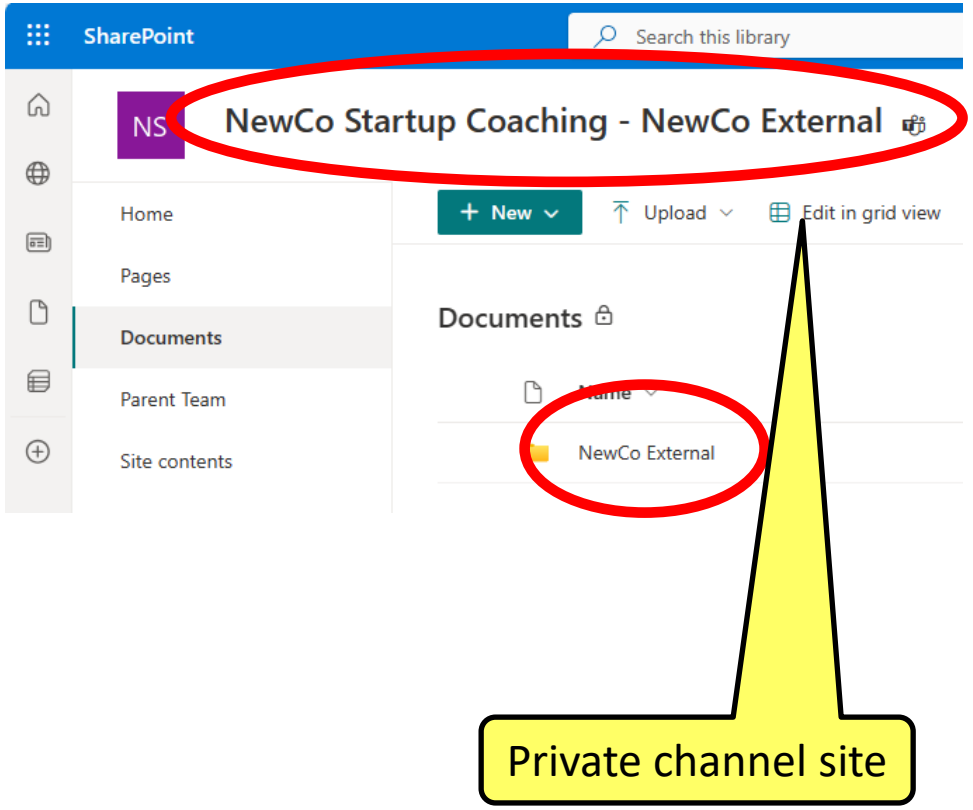
Establish Client Portal Model (continued)





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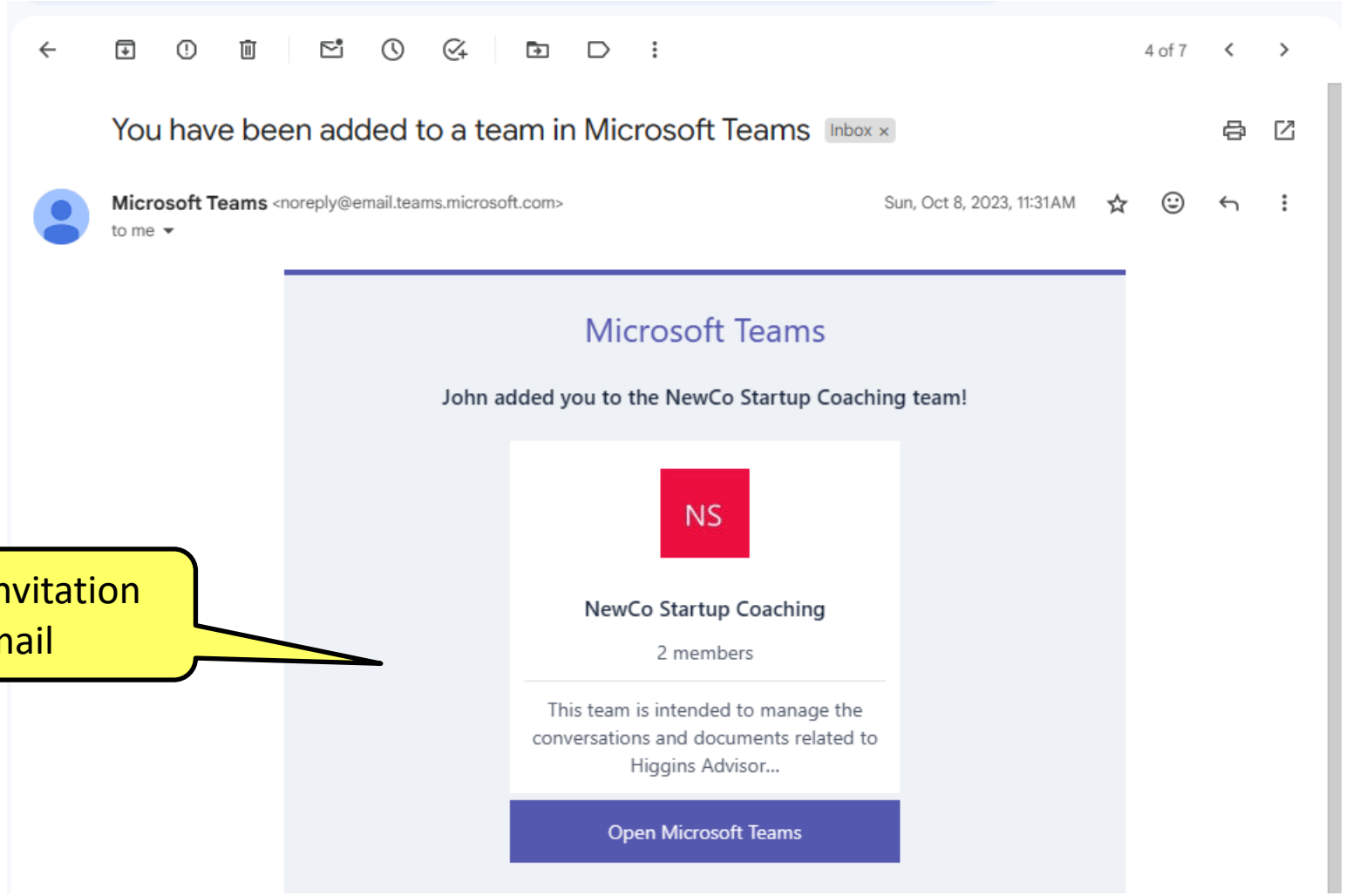

Client invitation email

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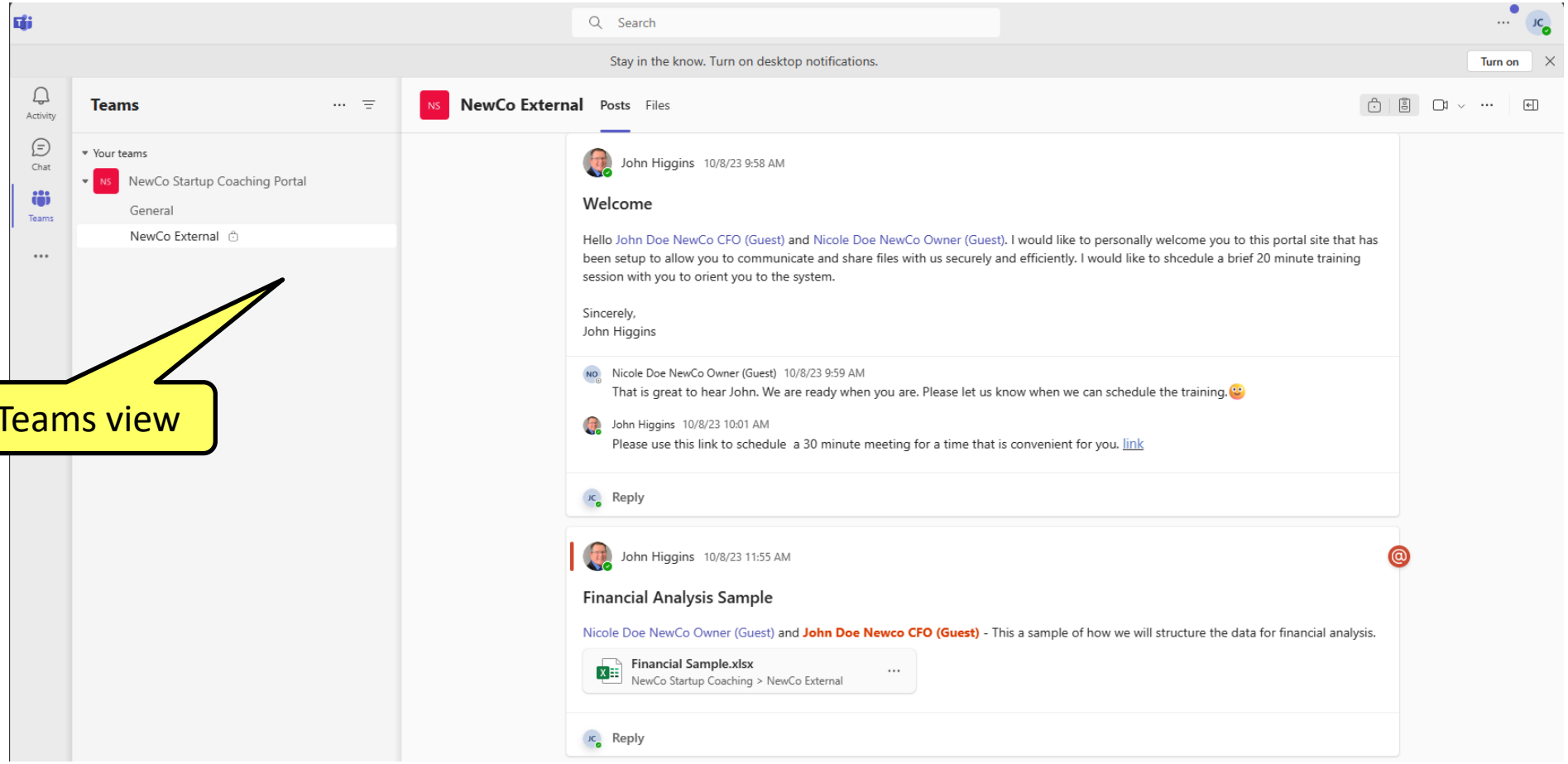
Establish Client Portal Model (continued)



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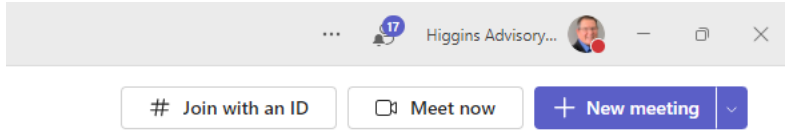
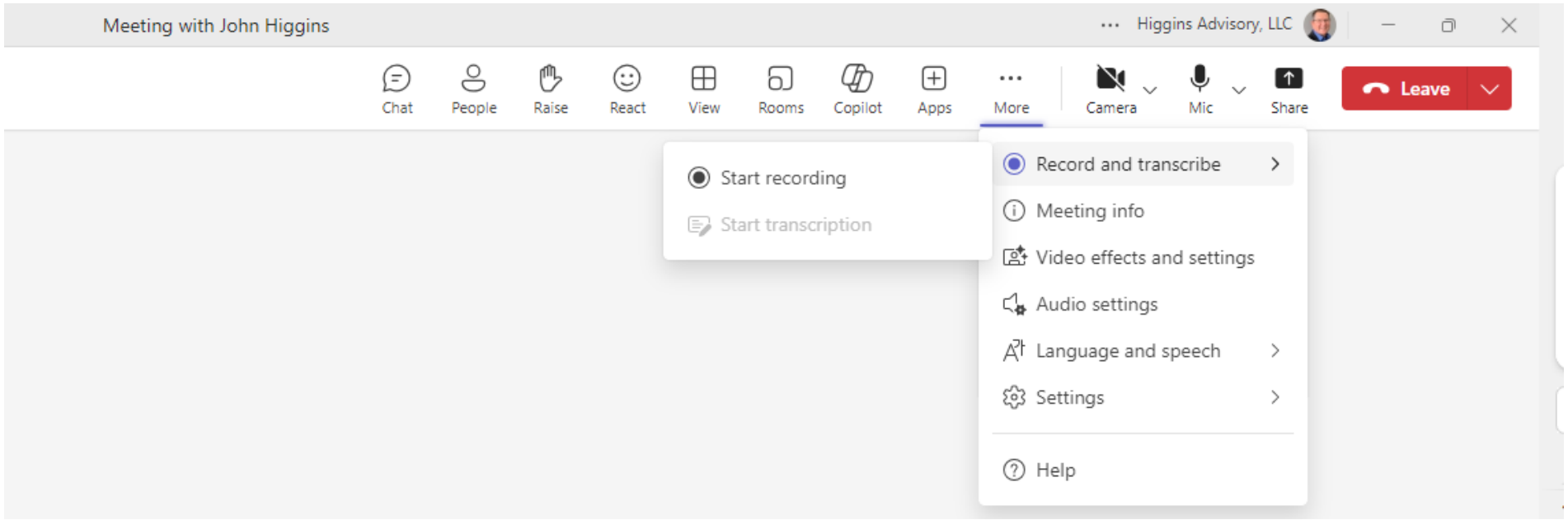
Document Meetings With Teams





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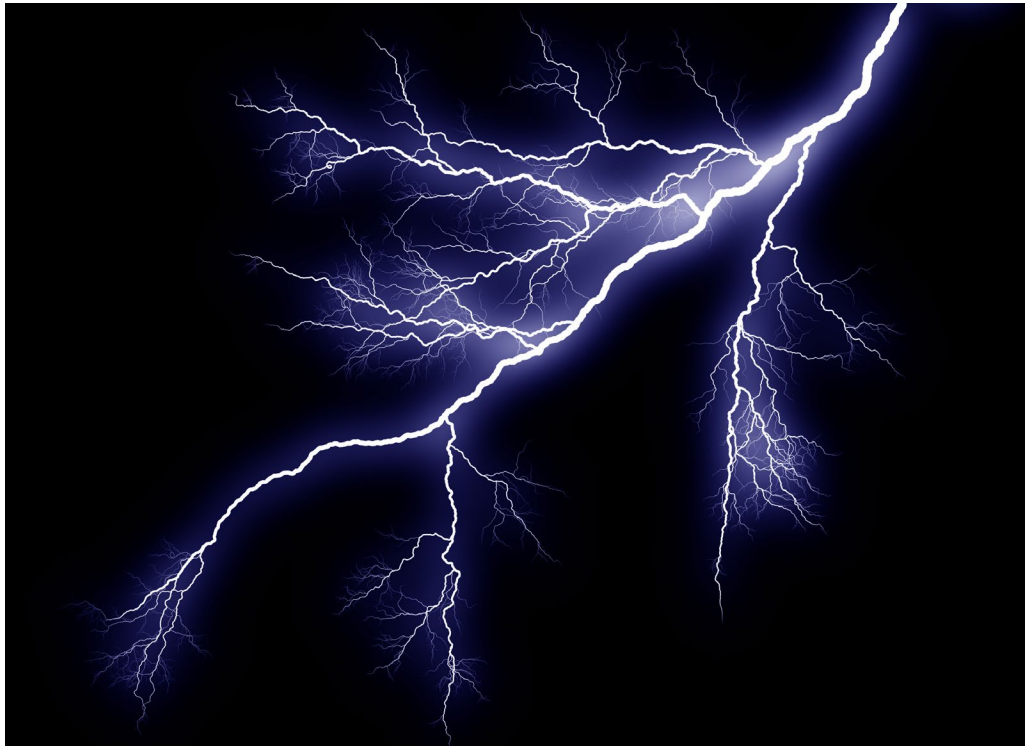
MICROSOFT 365 APPS LIGHTNING ROUND



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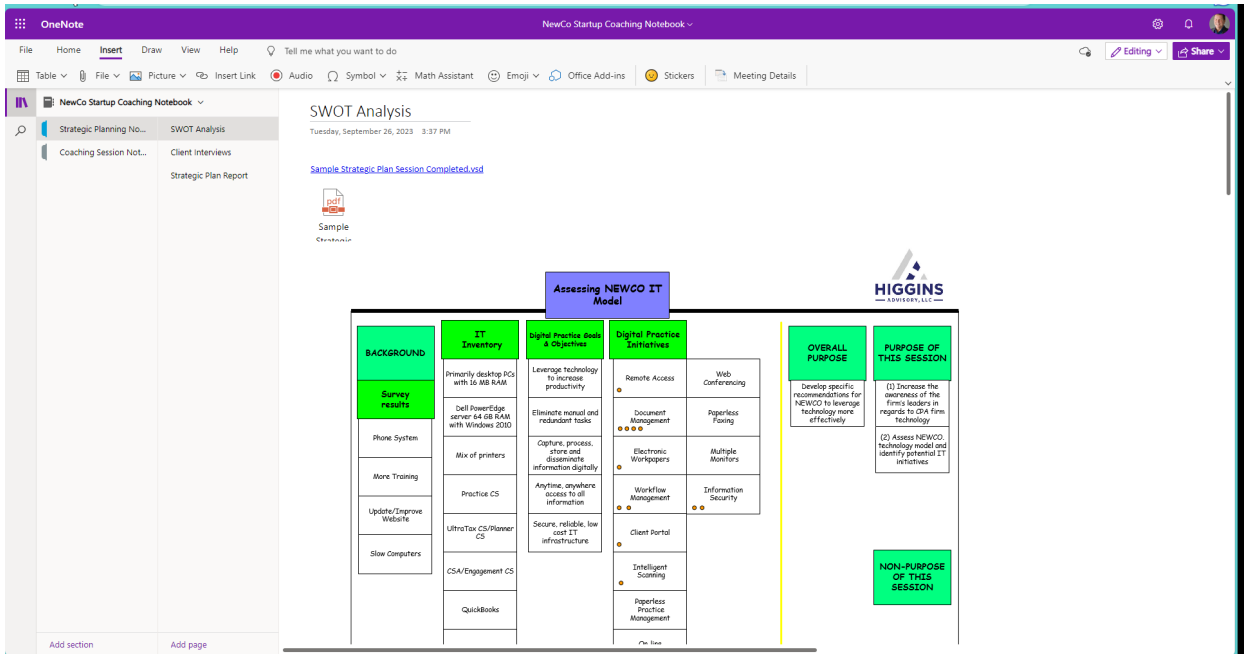
OneNote

- Dedicated notebook repository for all your notes, correspondence and misc. content



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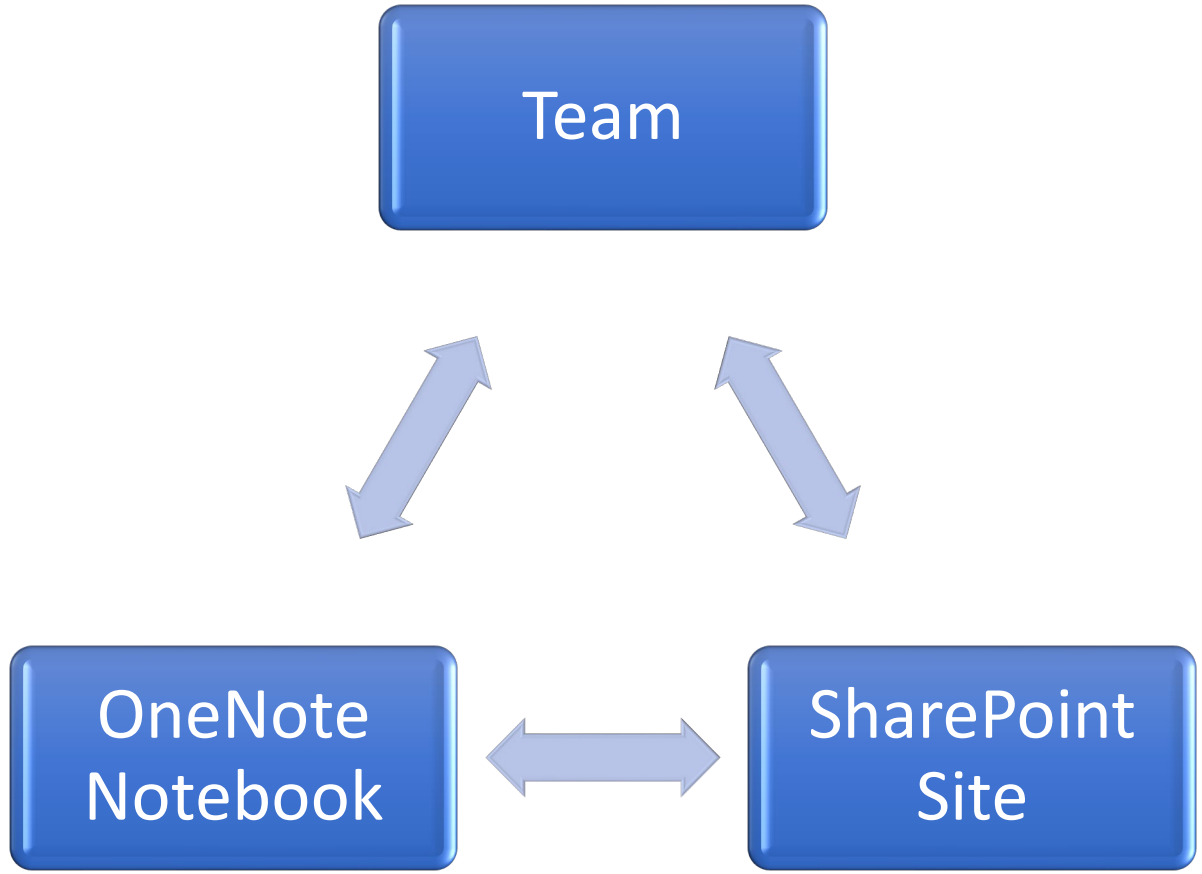
Teams / OneNote Relationship



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OneNote App Things to Know

- Supports multiple content formats
  - Text / audio / video / files / drawing / links
- Dictate option
- One to one Teams / SharePoint / Notebook
- Shared access to notebooks
- Custom note page templates

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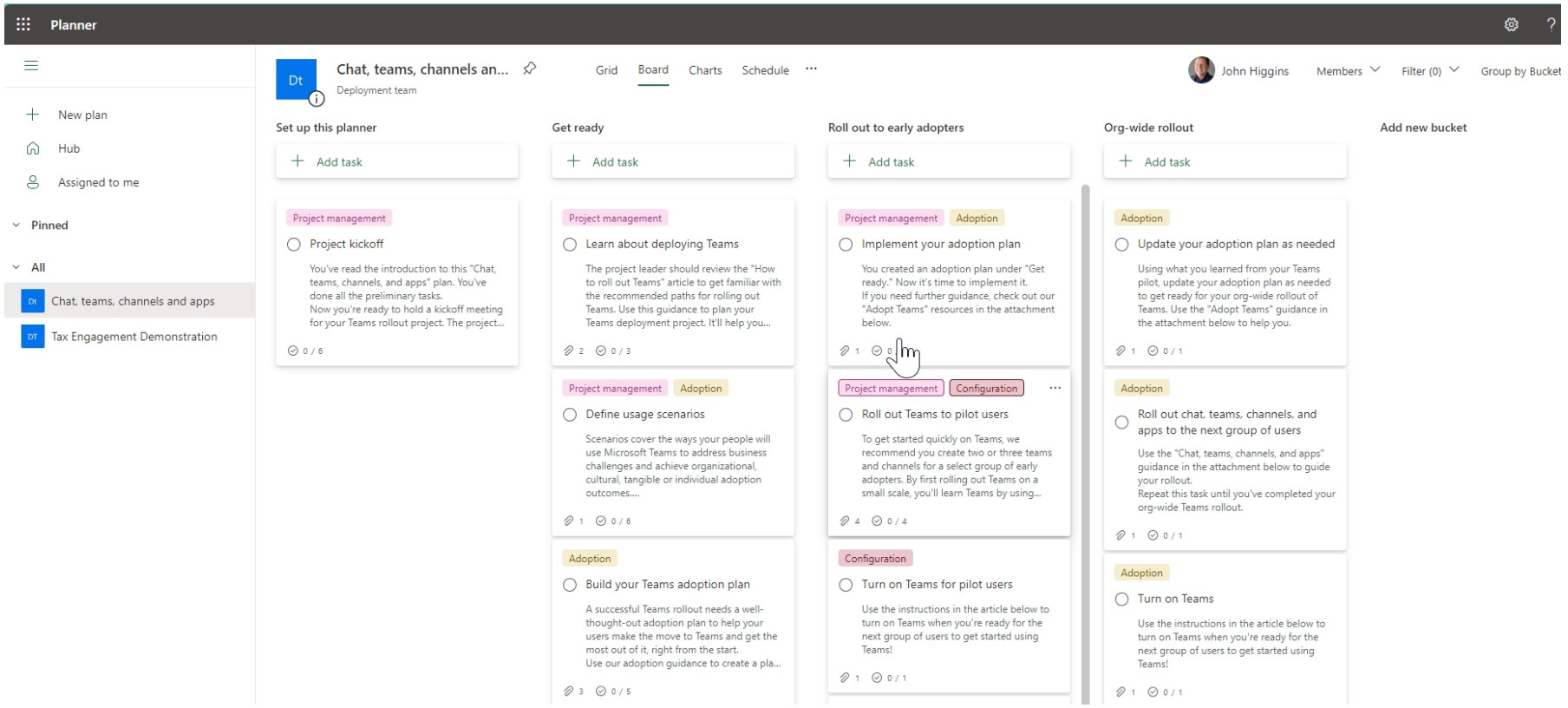
Planner

Manage engagements / projects from start to finish



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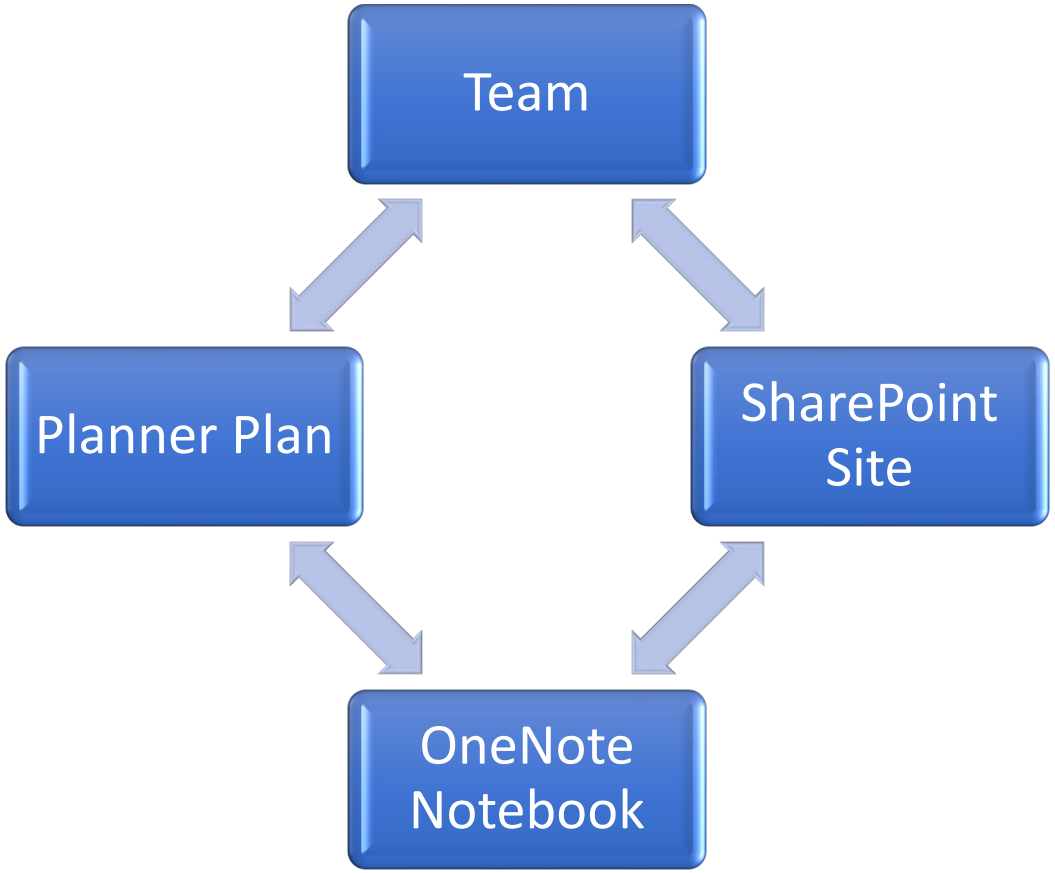

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Planner App Things to Know

- Plan / Buckets / Tasks
- Track milestones, task assignments, due dates
- Maintains task level activity tracking journal
- Visual project status reporting
- Assign tasks to external users
- Plan and task level templates

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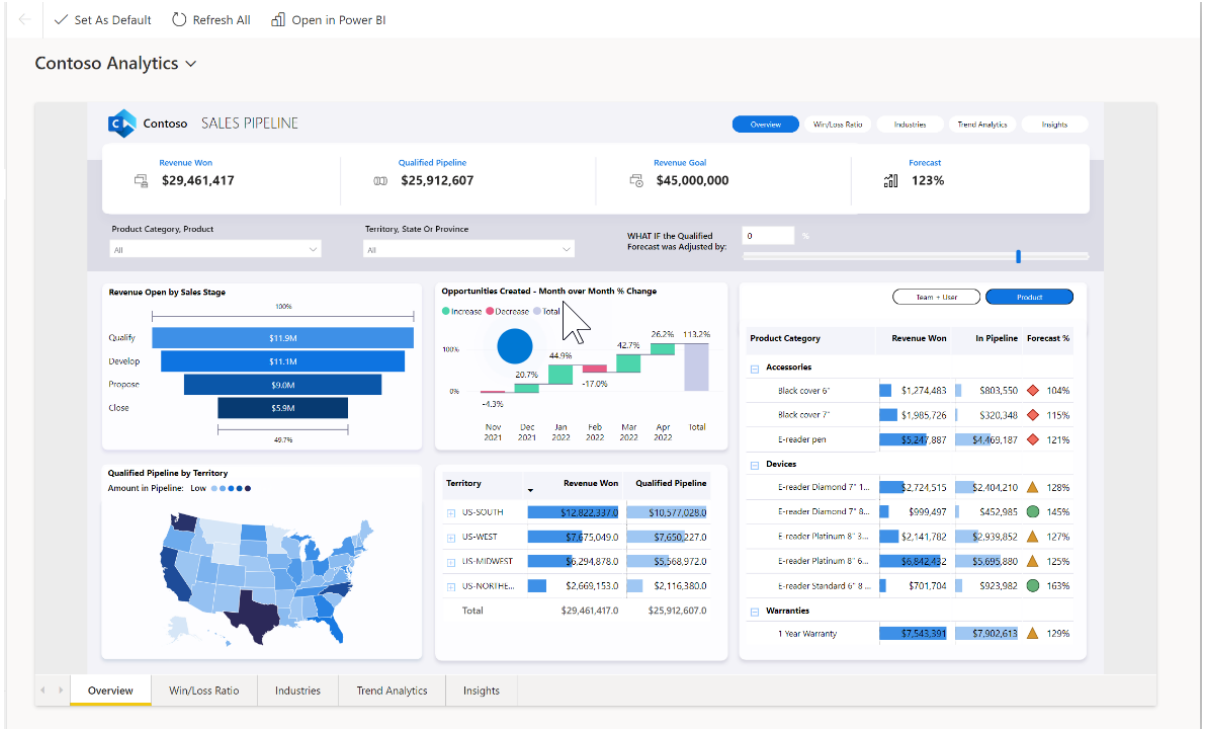
Power BI

- Create interactive visual dashboard reports to analyze data in real time



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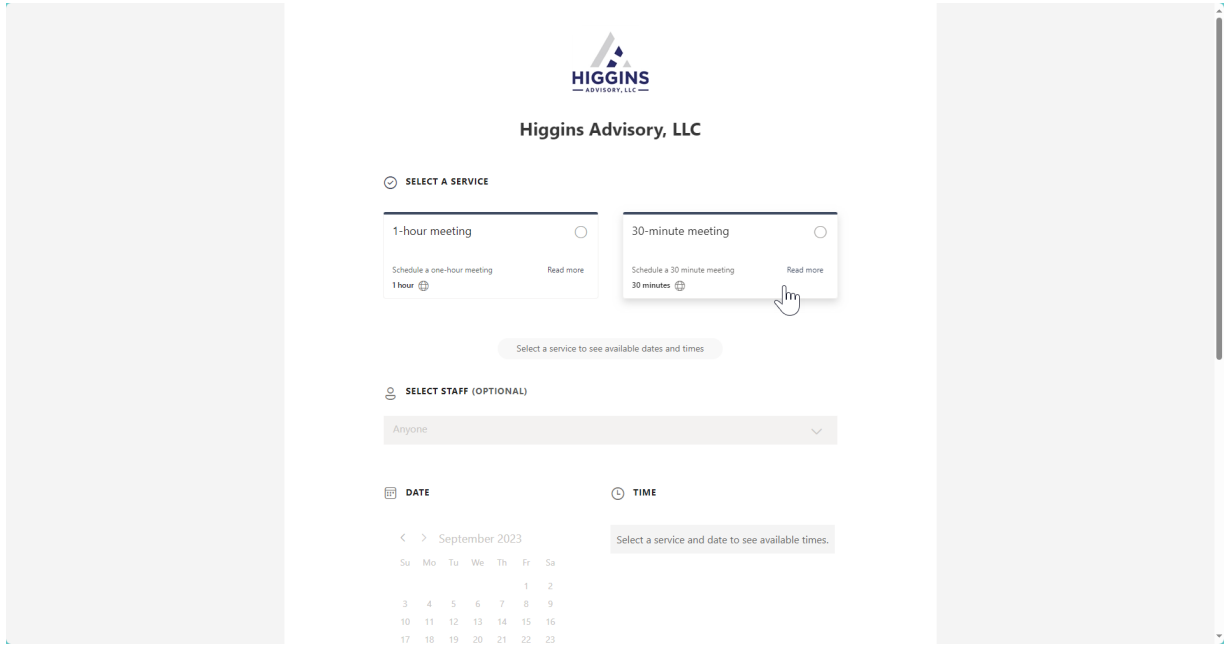
Bookings

- Streamline appointment scheduling



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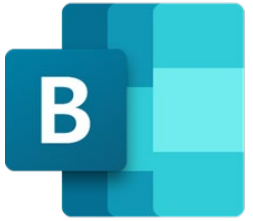
Bookings App Things to Know



- Streamline meeting scheduling
- Direct integration with Outlook & Teams
- Create custom booking page website
- Define meeting / service types
- Individual or team bookings page

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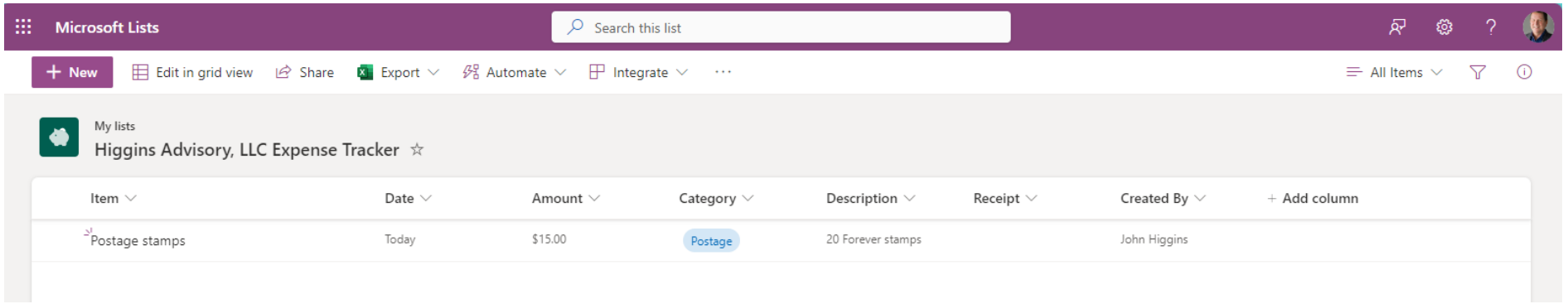
Lists

Create and manage customized lists



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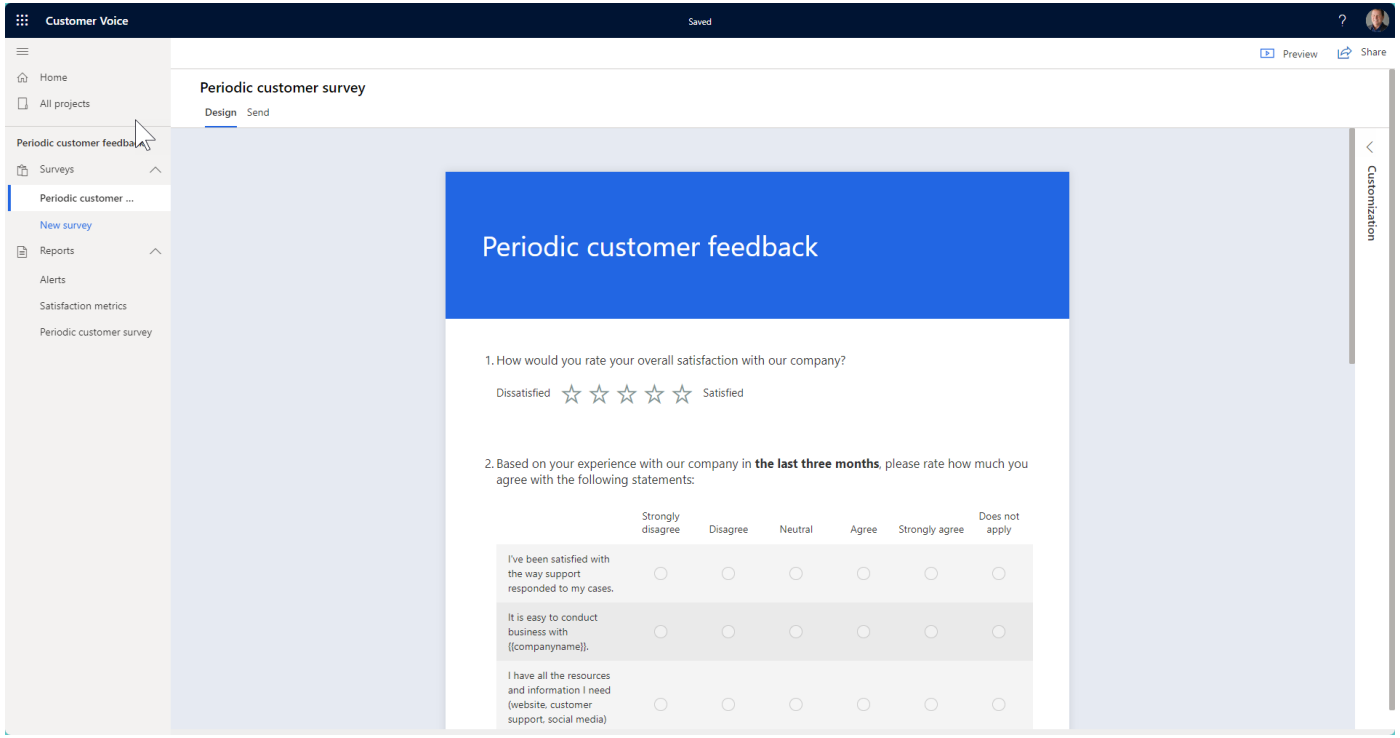
Forms

Gather data from clients, customer, employees



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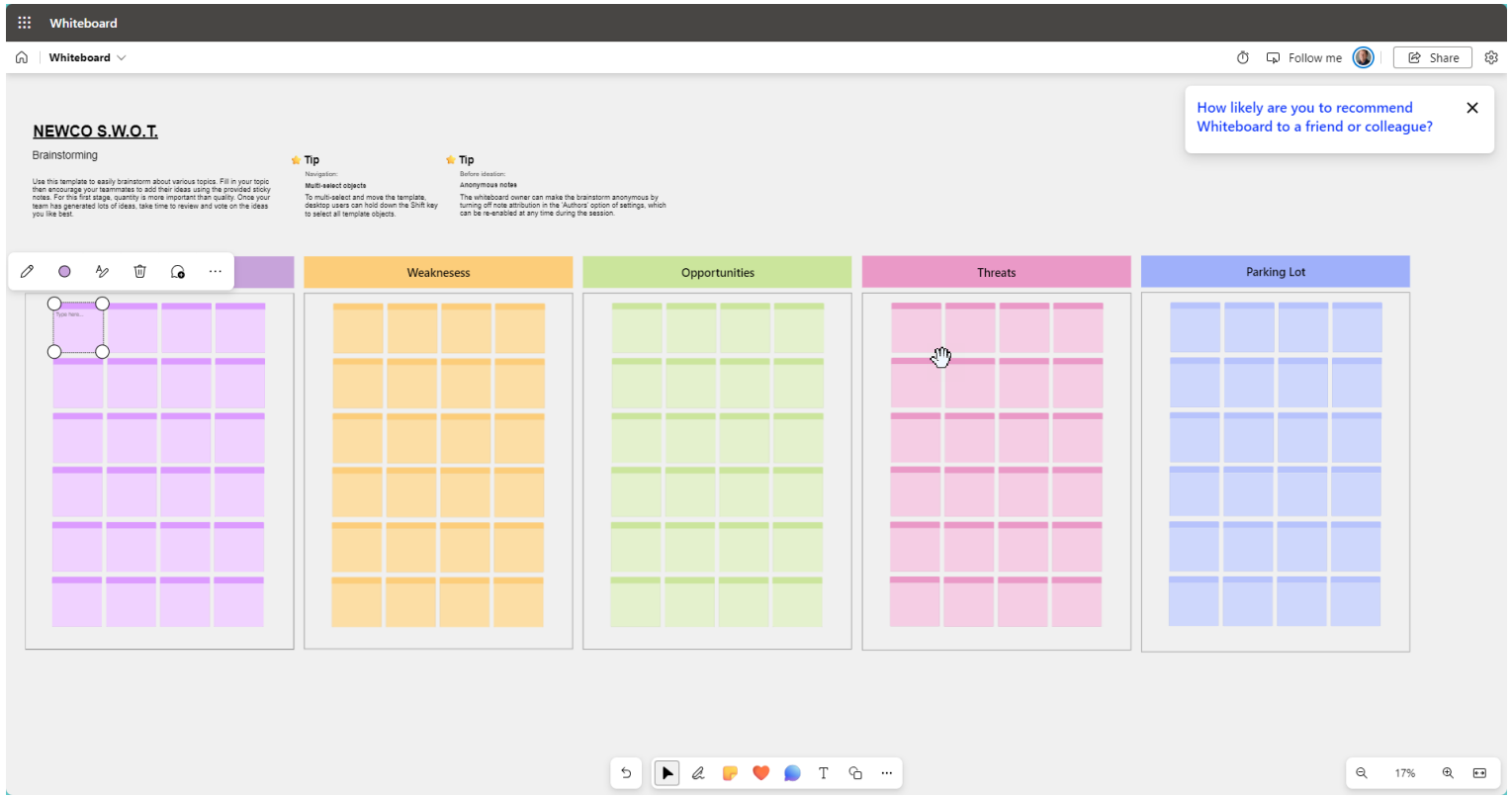
Whiteboard

- Facilitate brainstorming sessions



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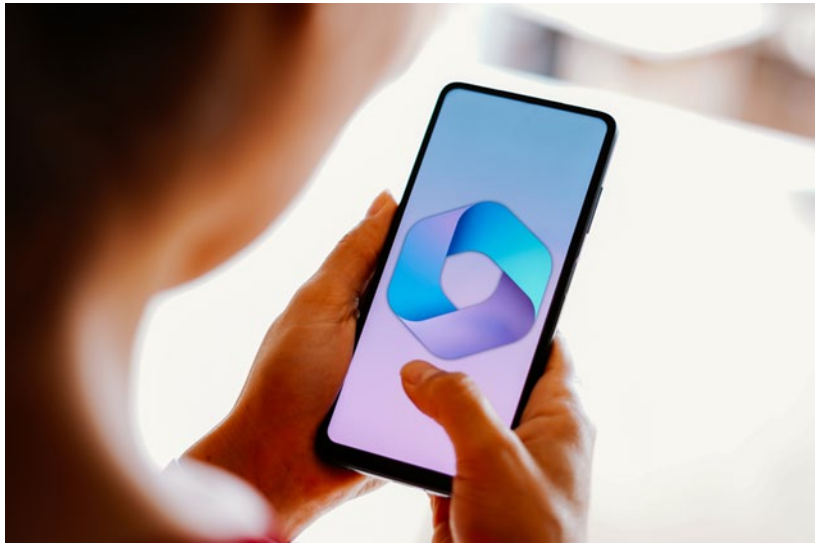
COPILOT PREVIEW



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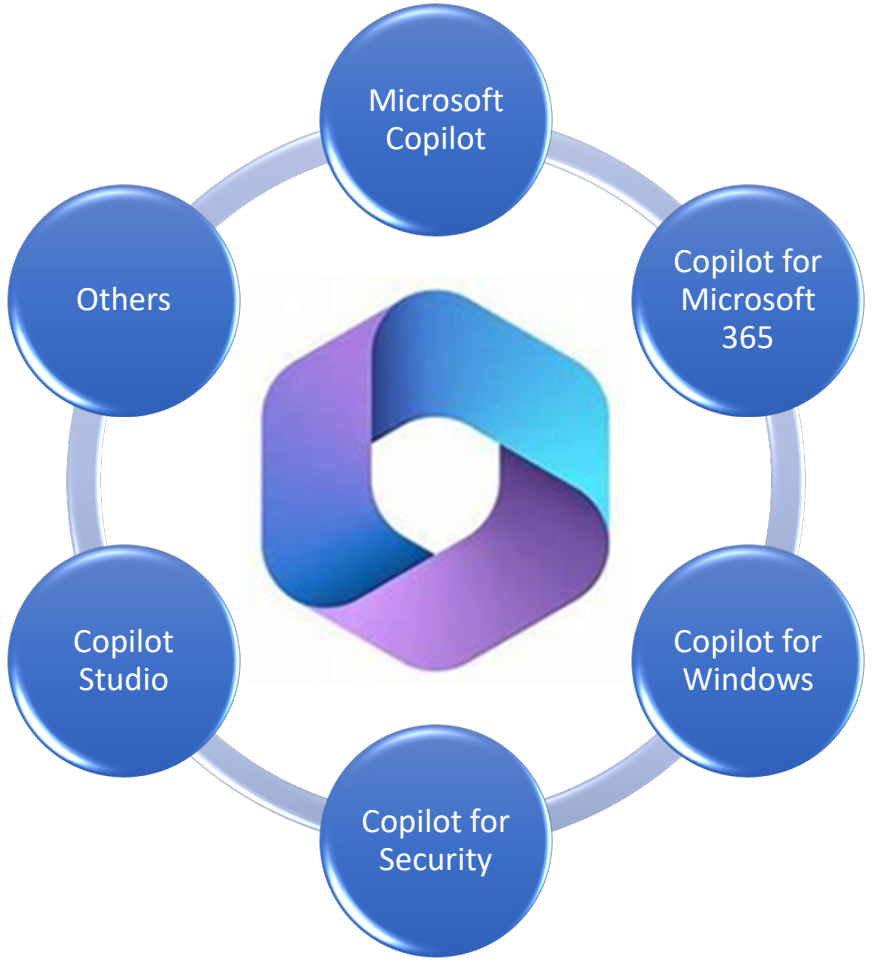
Microsoft Copilot Apps



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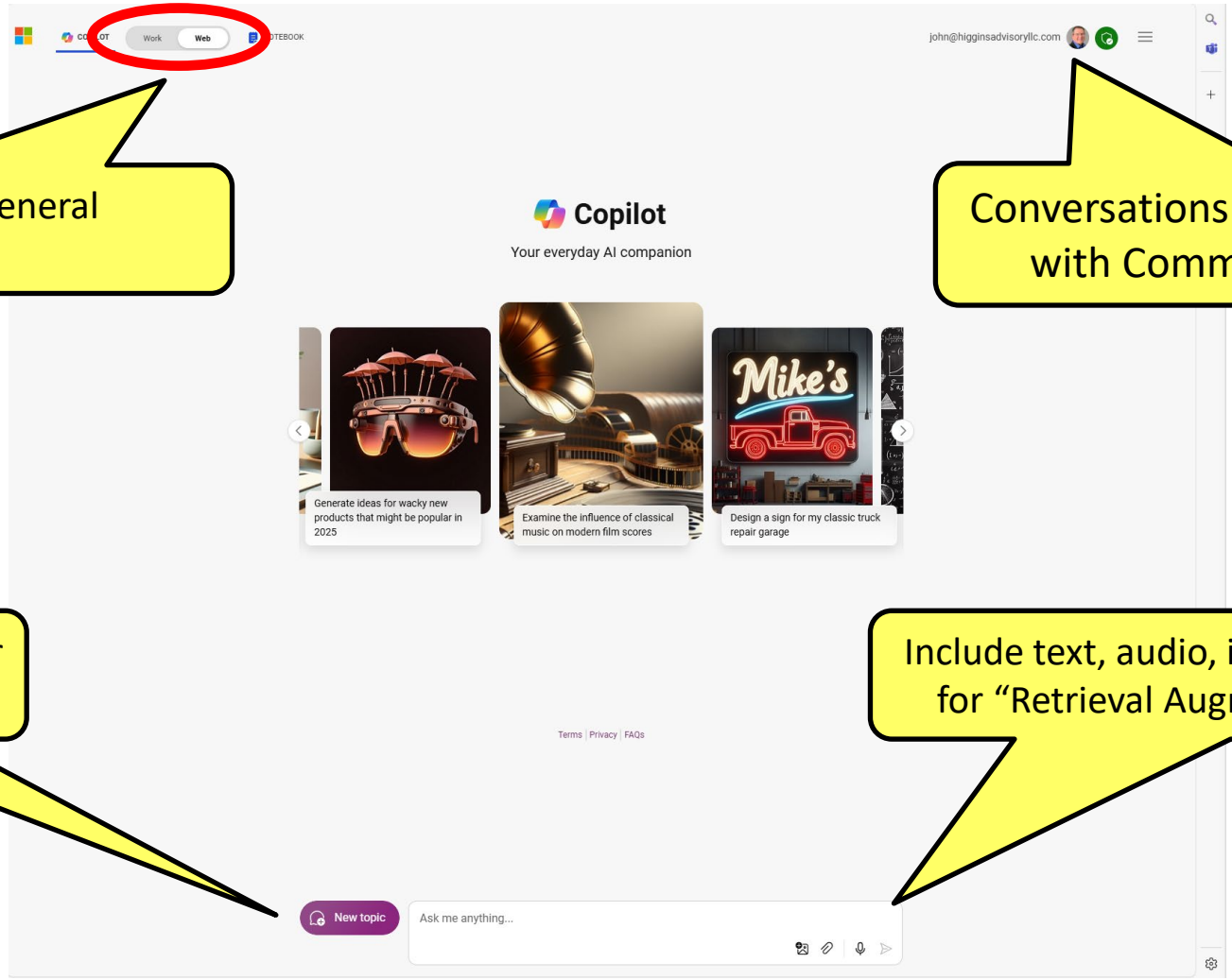
Copilot Prompt Screen - **Web**



"Web" is free and is used for general prompting / chatting

Conversations and data are kept private with Commercial Data Protection

Prompt data is not saved or used for LLM training

Include text, audio, images and files with prompt for "Retrieval Augmented Generation" (RAG)

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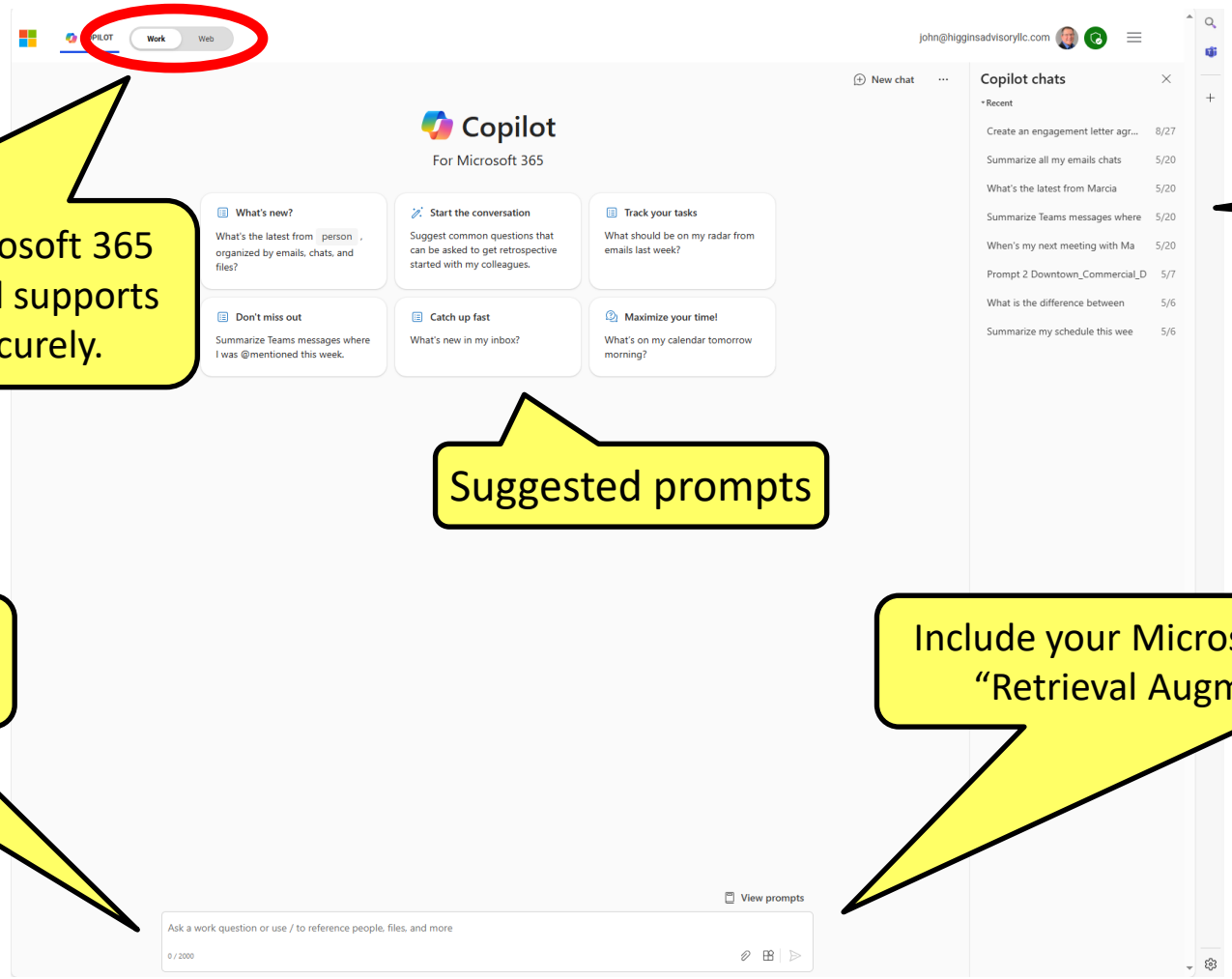
Copilot Prompt Screen - **Work**



"Work" requires Copilot for Microsoft 365 subscription ($30 per month) and supports prompting your company data securely.

Chat conversations are retained

Suggested prompts

Prompt data is not used for LLM training

Include your Microsoft 365 data with prompt for "Retrieval Augmented Generation" (RAG)

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Copilot for Microsoft 365

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Preparing Your Organization for Copilot

- Get your Microsoft 365 data governance managed
- Store files in SharePoint and OneDrive
- Use Teams & Channels vs. Chats
- Use Teams Meetings vs. Zoom
- Educate your staff on Generative AI & Copilot

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Copilot Licensing

- $30 per user, per month
- Requires Microsoft 365 Enterprise or Business subscription
- Can be procured on a user by user basis

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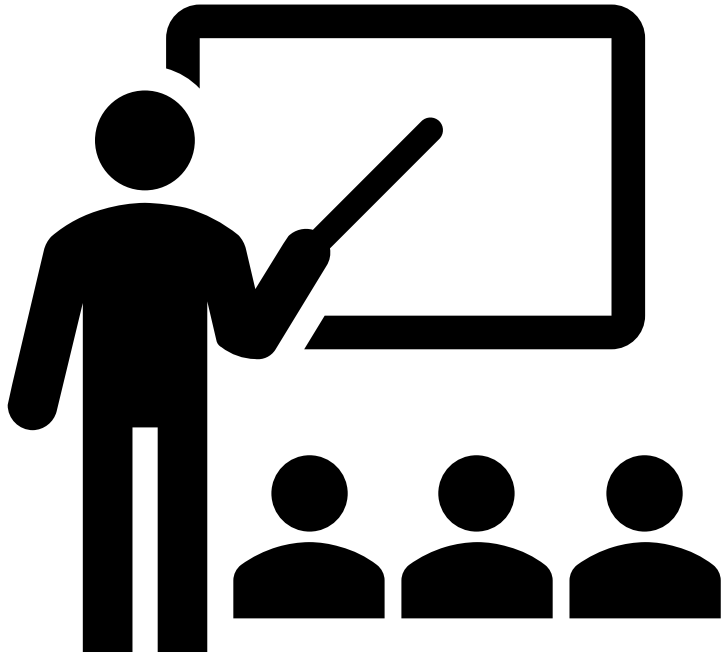
WRAP-UP



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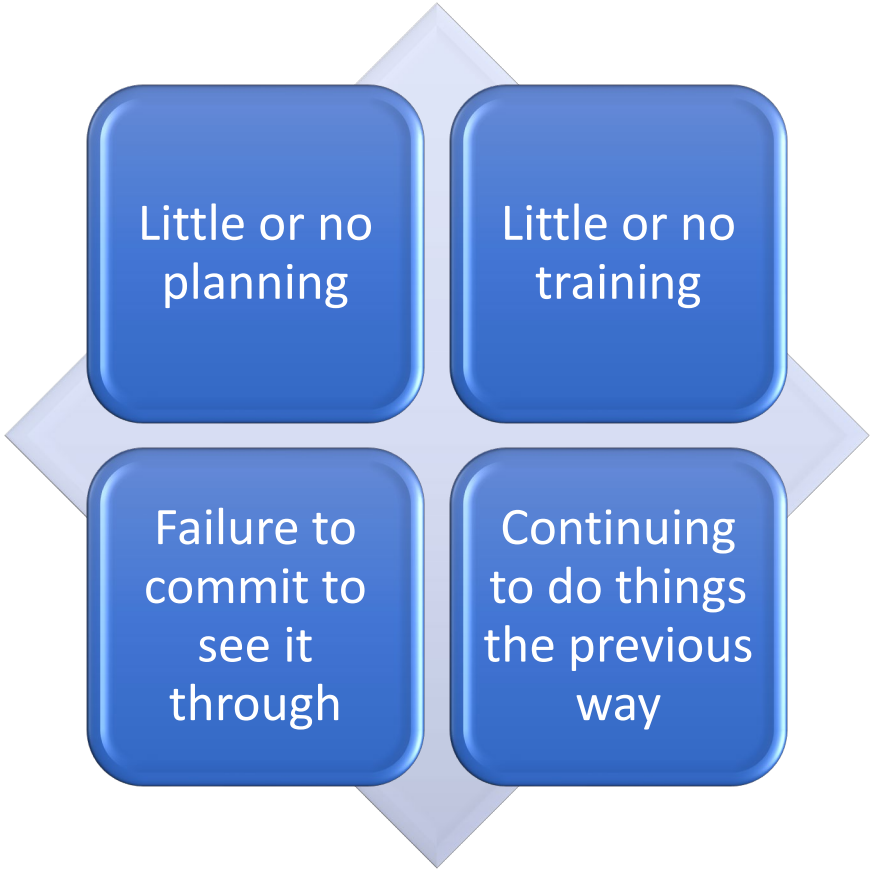
Common Deployment Failures



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In Summary

- There is an abundance of opportunity to increase productivity with Microsoft 365
- Focus on Teams and SharePoint as the foundation
- A little planning and training goes a long way
- Don’t try to do too much!
- Don’t do too little!
- Enjoy the journey!

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Questions ?

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Thank you!!!

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Bonus Material

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TEAMS & SHAREPOINT DEPLOYMENT BEST PRACTICE TIPS

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Establish a Teams Champion

- Responsible for overseeing deployment of Teams from the “user” perspective
- Deep dive learning about all aspects of Teams
- Facilitate Teams deployment planning, including policy settings
- Research and organize user training

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Teams Deployment Best Practice Tips

- Designate gatekeeper(s) for new team creation
- Establish policy for when to use teams vs. chat
- Commit to using SharePoint with Teams
- Build all SharePoint sites via Teams
- Limit SharePoint document library root folders to team channels
- Leverage channel tabs to “pin” files & apps

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Teams Deployment Best Practice Tips (continued)

- Leverage channel tabs to “pin” files & apps
- Establish goal to eliminate / minimize internal email communications
- Avoid using third party apps during initial rollout
- Avoid changing team and channel names due to SharePoint integration
- Provide Teams application and usage training

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TEAMS ADMIN SETTINGS REVIEW

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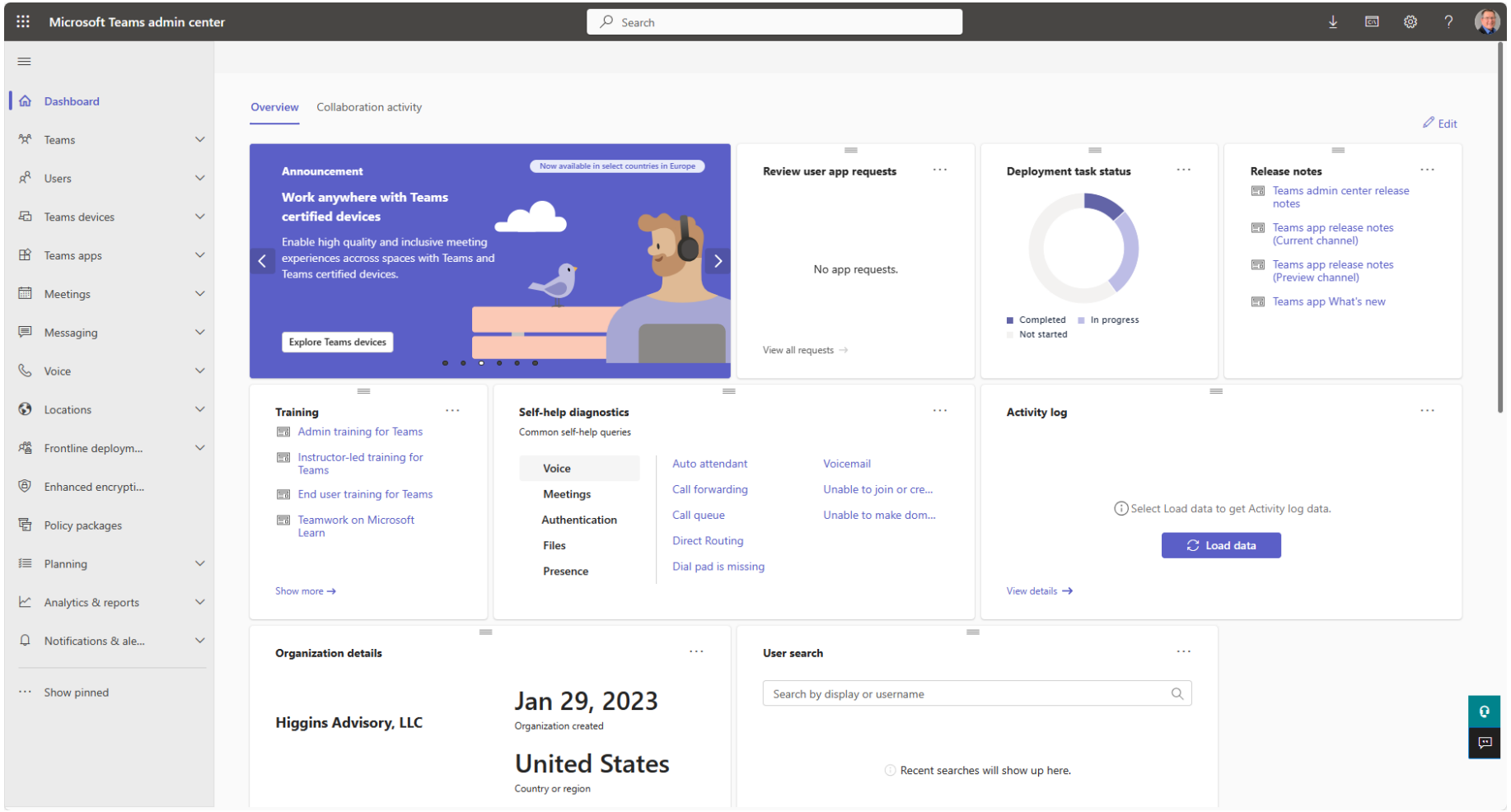
Teams Admin Center Home Page



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Key Teams Admin Settings

- Team settings
- Team policies
- Apps
- Meetings
- Planning
- Analytics & Reports

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STEP-BY-STEP ROADMAP FOR AN OPTIMAL DEPLOYMENT

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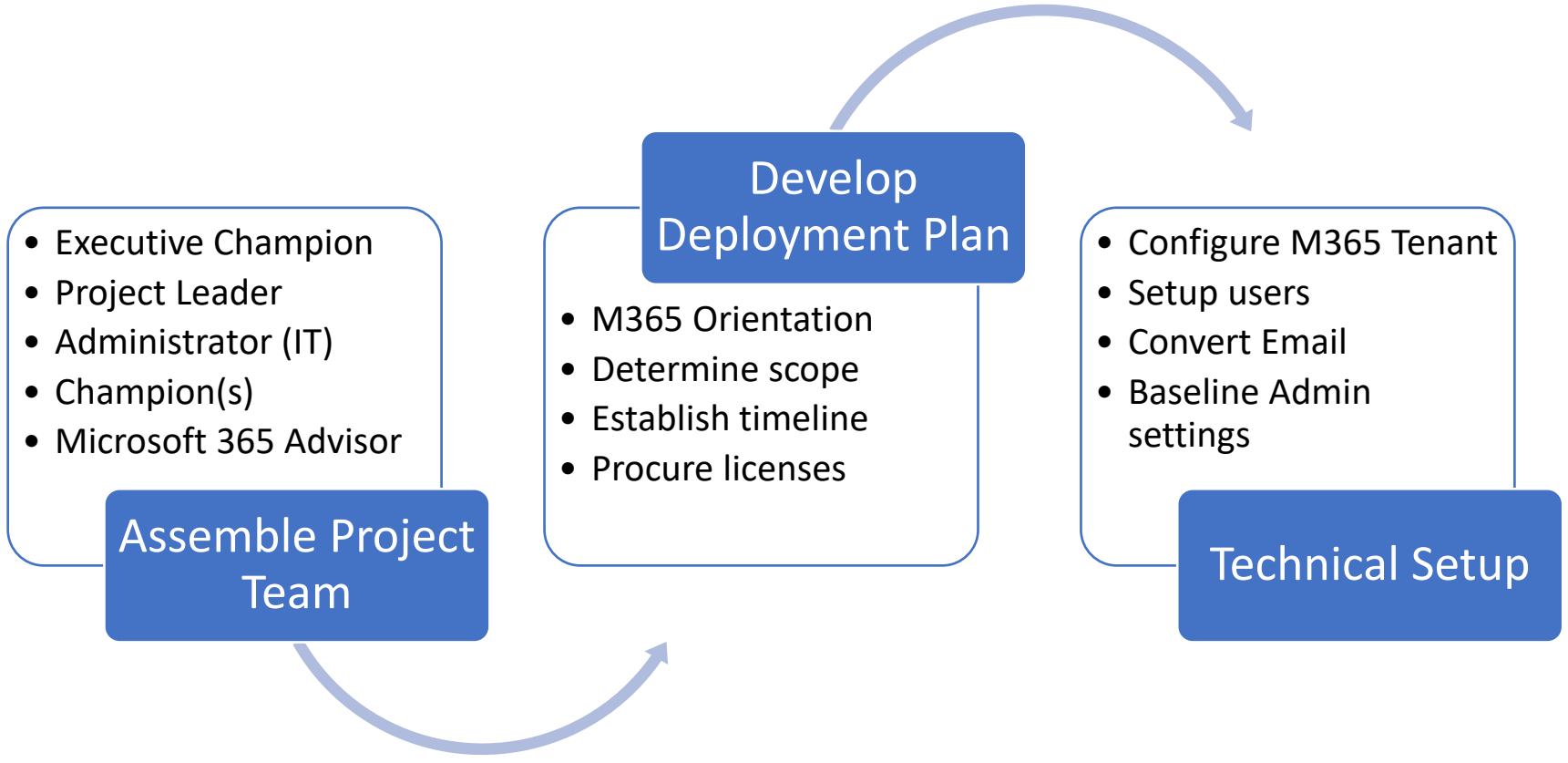
Deployment Roadmap



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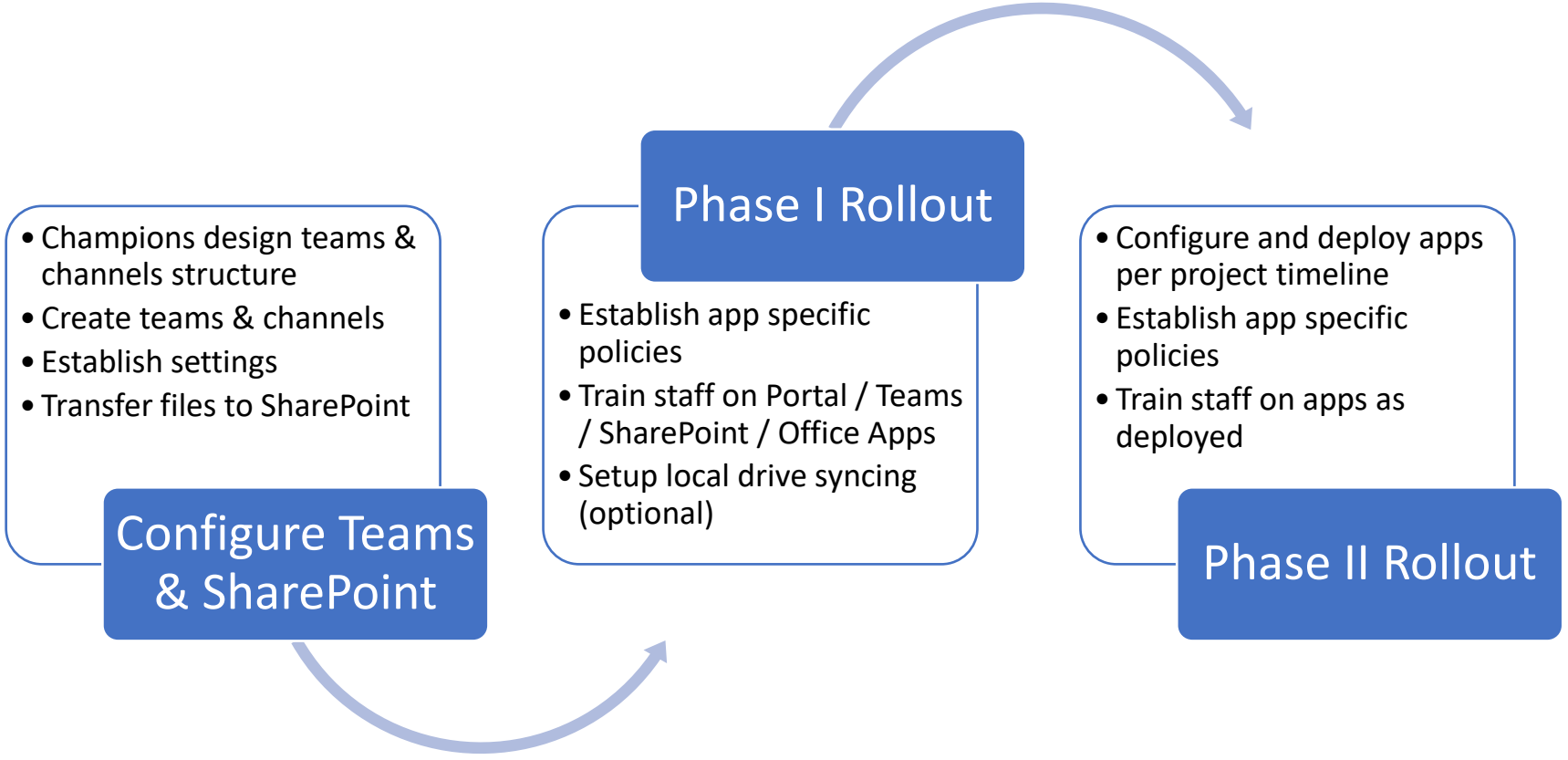
Deployment Roadmap (continued)



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M365 Deployment Task Force Best Practices

Executive Champion	• Commit the organization to the project • Establish company goals / budget / deployment date
Project Leader	• Develop / manage project plan • Organize / facilitate task force meetings
Service Line / Department Champions	• Represent the needs of respective team • Lead project communications with team
M365 App Champions	• Develop expertise in designated app • Facilitate app user training / knowledge sharing
M365 Admin (IT)	• Manage the Admin app • Manage data conversion / configuration settings

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Key Deployment Decisions

- ✓ Subscription plan selection, per user
- ✓ Existing apps to retire
- ✓ Selection and timing of apps to deploy
- ✓ Data to convert / transfer
- ✓ Commitment to Teams and SharePoint
- ✓ Teams / channel structure

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ADDITIONAL RESOURCES

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Things to Know About Subscription Plans

- Monthly or annual subscriptions
- Modify or cancel subscriptions at any time
- Application set defined by subscription plan
- Install desktop apps on up to 5 devices, per user
- Mix and match subscriptions by individual
- Fee includes technical support from Microsoft

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Microsoft 365 Subscription Plans

- **Business** plans for small / mid size businesses
- **Enterprise** plans for larger businesses
- Purchase direct from Microsoft online or partner
- Use these links for more information

Microsoft 365 **business** subscription plan details

Microsoft 365 **enterprise** subscription plan details

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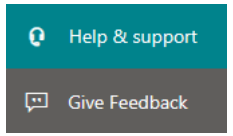
Additional Support Resources

- Microsoft sponsored 365 training & support
- LinkedIn Learning
- Microsoft 365 CPE from Higgins Advisory
- Microsoft 365 Admin support



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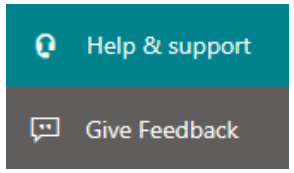
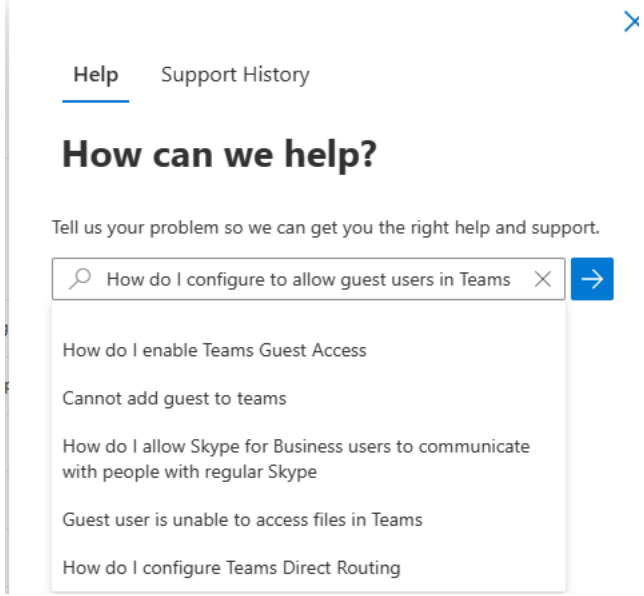
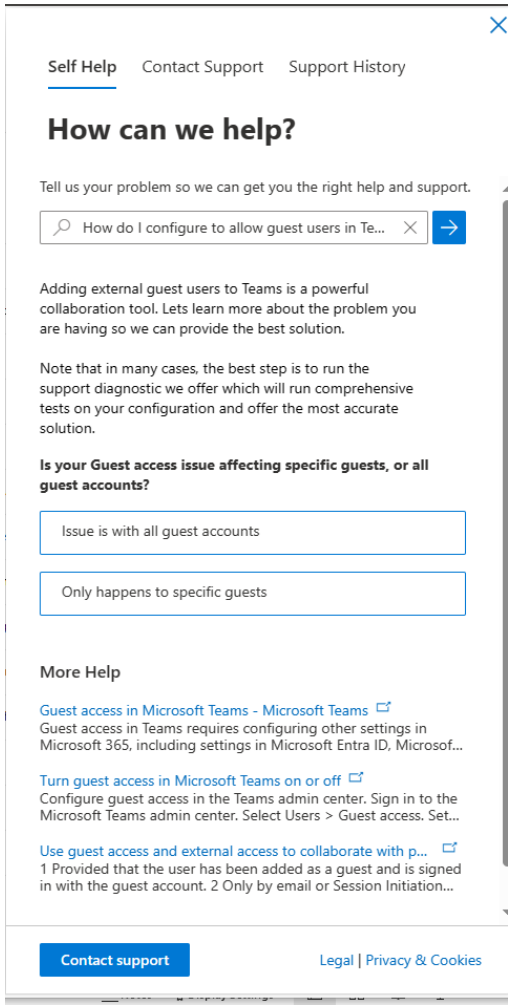
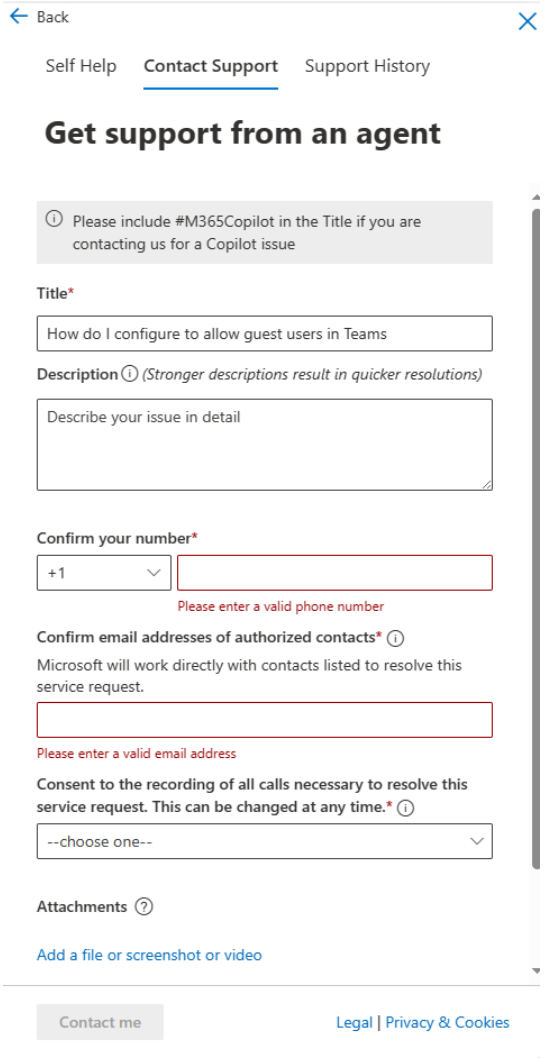
Microsoft Self-service Support









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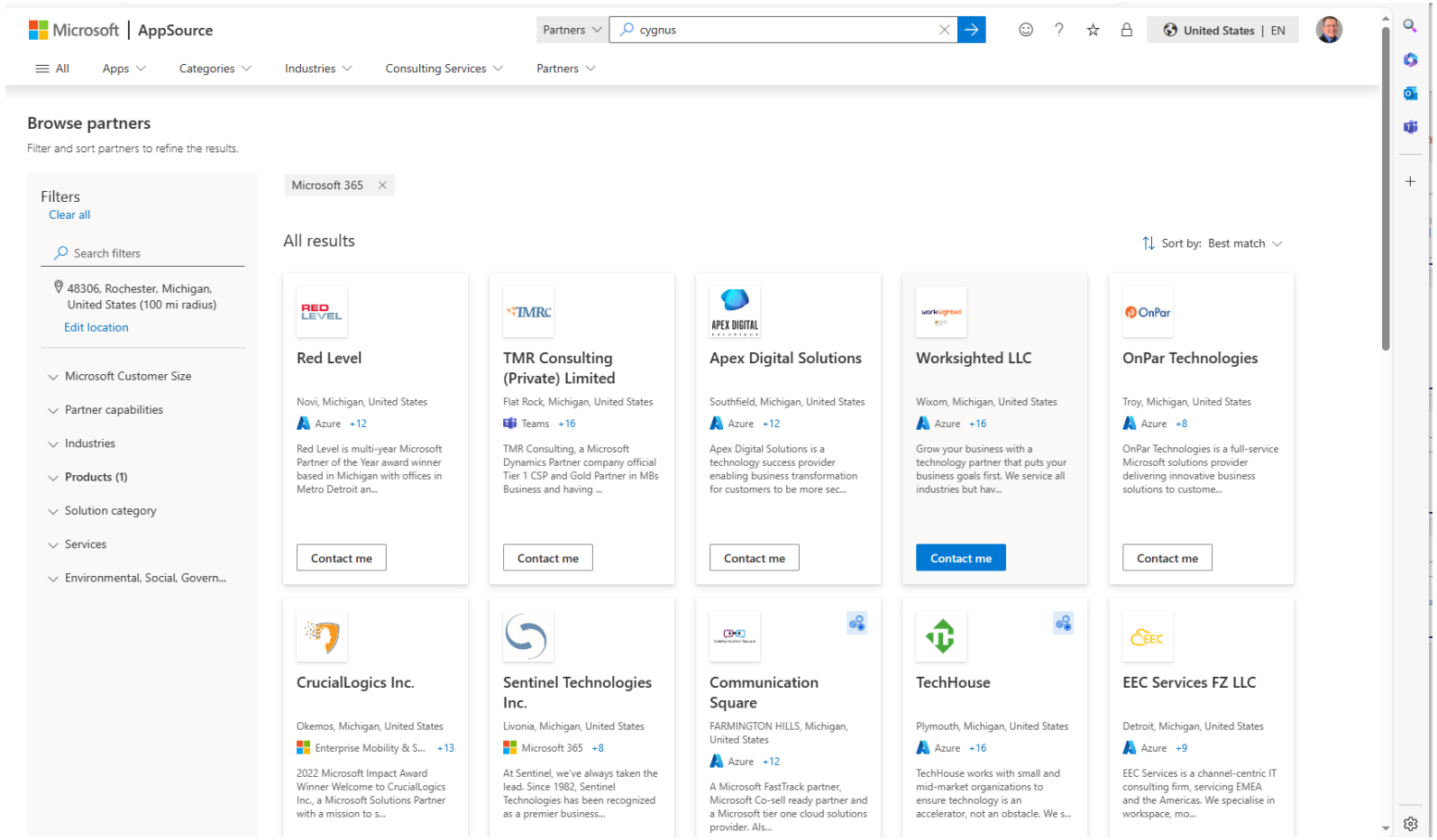
Microsoft Business Partners