**Microsoft**

FastTrack Envision Checklist

What is FastTrack?

FastTrack for Microsoft 365 provides end-to-end guidance for planning, onboarding, and driving user adoption for Microsoft 365 comprised of Enterprise Mobility + Security, Windows 10, and Office 365. Included with your subscription, FastTrack lets you engage with Microsoft engineering experts, and provides best practices, tools and resources.

Based on thousands of customer experiences, we developed a three-phase approach to onboarding:

Envision, Onboard, and Drive Value.

The following checklist provides a few tips that our FastTrack for Microsoft 365 managers and engineers use to get your **Envision** phase underway.
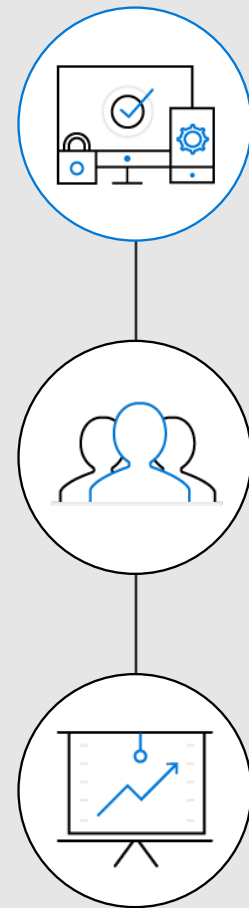
| 1. Envision | 2. Onboard | 3. Drive Value |

Envision:
Plan and prioritize your onboarding

One of the first questions we hear from our customers is "Where do I begin?"

The first thing you must do in carrying out a successful rollout is to define your vision and think about the scenarios or objectives you want to achieve. Do you want to enable your users to work anytime, anyplace on any device? Do you want to protect your organization's data?

The Envision phase enables you to build a blueprint for managing your rollout. We call this the Success Plan, since this will be your reference guide throughout the engagement, and a way to walk through each phase of your deployment experience before a single user is affected.

During the FastTrack Envision phase, FastTrack team members will help you determine exactly what you need to deploy based on targeted questions about your organization. They will help determine a deployment style that works for your business based on your requirements. You will come away from the Envision phase with a smart, actionable communications and deployment plan.

United Bankshares, a regional financial services company, works with Microsoft FastTrack to implement Microsoft 365. During their Envisioning phase, United Bankshares was very cognizant of how their new solutions would affect their employees. They worked with FastTrack to put the right planning and prioritization in place so there are no surprises later and the right user experience goes into effect.

"We have to be very mindful of our ability to support our end users as we roll through the project."

-Willem Bagchus
Messaging and Collaboration Specialist, United Bankshares

Envision Checklist ✓

Here is a checklist of considerations you can use when preparing for working with FastTrack on the Envision phase of the FastTrack journey:

☐ **Know your goals and scenarios**
Decide what specific products and feature sets you want to enable and why by understanding what they will do for your company and your users.
Here are some examples:

☐ Do you plan to secure your cloud resources and force users to provide additional verification to access them? For instance, are you thinking about

☐ Multi-Factor Authentication (MFA)
☐ Mobile device management
☐ Azure Active Directory domain join
☐ App access management

☐ Are you considering empowering users to manage their own password resets?

☐ How will you control admin access to cloud services (like O365), such as permanent rights granted to their account, or requiring MFA for admins?

☐ What will be your device management strategy?

☐ Which platforms (iOS, Android, Windows, etc.)?
☐ Do you have corporate owned devices, will you allow BYOD (Bring Your Own Device), or both?

☐ **Leverage the resources to build your understanding**
Define the minimum requirements to deploy and determine if those requirements will work on your legacy architecture. You can find product videos, infographics, and demos at Microsoft Docs and FastTrack resources.

☐ **Map your key stakeholders and influencers**
Determine who will lead your organization's various teams and departments in this transformation, which employees will need special training based on how the new security tools affect their work, and who will own deployment and ongoing operations. FastTrack will use this information to identify the context of your deployment as it maps to your employees.

FastTrack will help you develop your blueprint for success. Here are some deployment planning considerations where FastTrack can help during the Envision step:

☐ **It's a journey—tackle quick wins first**
Prioritize which scenarios should come first. FastTrack will help identify and setup solutions in priority order, because there can be nuances like: subsequent solutions are dependent on them, they can easily build on existing technology, or they address significant challenges in your organization.

☐ **Don't forget the end user: build a good communications plan upfront**
Think about what will help your employees adopt and embrace this new technology. Describe how these new security tools help your employees do their job better and how they can get started. FastTrack will make sure you are equipped to communicate every pertinent phase of your plan to the right people at the right times.

☐ **Create a plan for a successful deployment**
FastTrack has explored and helped implement dozens of different deployment scenarios for customers ranging from small businesses to large enterprise operations, and they will help you create a plan for successful deployment.

FastTrack Success Plans capture the intent of your project and can be completed by you, or a partner or Microsoft employee on your behalf. Planned activities and workloads for the project are scoped through a series of questions about your organization and environment. The plan provides recommended planning, remediation activities, and resources based on the specific details of your plan.

To learn more about how to create, share, edit and deploy a FastTrack Success Plan, read the FastTrack Customer User Guide.

FastTrack comes with your
subscription at no additional charge.

Get started at FastTrack for Microsoft 365.

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