



The Productivity Guide:

Maximising the value of existing technology.



We're all carrying digital debt: the inflow of data, emails, meetings, and notifications has outpaced humans' ability to process it all. And the pace of work is only intensifying. Everything feels important, so we spend our workdays trying to get out of the red.

Nearly **2 in 3 people (64%)** say they struggle with having the time and energy to do their job—and those people are 3.5x more likely to also struggle with innovation and strategic thinking.¹

And nearly **2 in 3 leaders (60%)** are already feeling the effects, saying that a lack of innovation or breakthrough ideas on their teams is a concern.¹

There are only so many minutes in the day —and every minute we spend managing this digital debt is time not spent on the creative work that leads to innovation. In a world where creativity is the new productivity, digital debt is more than an inconvenience—it's impacting business. How can you get the technology you have in place working for you, increasing productivity to save you and your clients time and money?

Explore our guide to understand the quick wins and possibly hidden tools and features in each solution in our productivity stack has to offer:



1. Work Trend Index | Will AI Fix Work? (microsoft.com)

Making the most of Microsoft 365

We're here to shine the light on some lesser-known Microsoft 365 tools that can help you save time and money.

Here's are our Top 10 features that you might not know about, but definitely need:



1. Microsoft Planner

This is a task management tool that helps users organise and track teamwork. It's great for creating simple task lists, assigning tasks to team members, and tracking progress.

This can be used in place of having separate project management tools that might be over-featured or overpriced for smaller teams. It can be used instead of separate Kan-Ban-style products. It can eliminate the need to have task-tracking spreadsheets, or using shared calendars for task assignments.

Microsoft Planner is available in the following licenses:

- Microsoft 365 Business Basic
- Microsoft 365 Business Standard
- Office 365 E1
- Office 365 E3
- Microsoft 365 A1
- Office 365 Business Essentials
- Office 365 Business Premium





2. Microsoft Forms

Forms allows you to create surveys, quizzes, and polls quickly. It's an excellent tool for collecting feedback or data from colleagues or customers. It's great for those that may not have the time or expertise to undertake this kind of build in Power Apps or other more sophisticated toolsets. It can be used instead of SaaS apps like SurveyMonkey, Wufoo, Formstack, and any of those 'form creation' apps, including Zoho. Forms integrates with Excel and SharePoint, so it helps to enhance data collection and analysis within the Microsoft ecosystem.

Microsoft Forms is available in the following licenses:

- Office 365 Business Essentials
- Office 365 Business Premium
- Office 365 Enterprise E1
- Office 365 Enterprise E3
- Office 365 Enterprise E5
- Microsoft Forms is also available to existing Office 365 Enterprise E4 customers who purchased E4 before its retirement.



3. Microsoft Stream

This is a video-sharing service that enables you to upload, share, and manage videos securely within your organisation. It's a handy tool for internal training videos or company-wide announcements.

It can replace internal video hosting platforms, video conferencing recording services, webinar, and virtual event platforms.

Microsoft Stream is available in the following licenses:

- Office 365 Business Essentials
- Office 365 Business Premium
- Microsoft 365 Business Basic
- Microsoft 365 Business Standard
- Microsoft 365 Business Premium



4. Microsoft Viva

Microsoft Viva provides insights into your work habits, email and meeting patterns, and overall productivity. It helps you understand how you spend your time and suggests ways to improve productivity. It can be used to supplement employee engagement apps/platforms, Learning Management Systems, knowledge management systems, and it can be an alternative to some training and development apps/platforms.

The Crayon Productivity team recently did a webinar on Microsoft Viva, to help educate our partners on how to use and leverage this powerful addition to the M365 platform.

It's now available OnDemand, watch [here](#).

Microsoft Viva is available in the following licenses:

- All Office 365 Licenses
- All Microsoft 365 Licenses



5. Microsoft Lens

Office Lens is a great way to capture notes and information from whiteboards, menus, signs, handwritten memos, or anything with a lot of text. You don't need to jot down notes, rely on blurry images, or worry about misplacing anything. It's great for capturing sketches, drawings and equations too, and even images without text.

This mobile app can automatically enhance images and convert them into editable Word or PowerPoint files, you can save to PDF or send them in an email.

Microsoft Lens is free to use and available in the Microsoft App store for anyone with a Microsoft account.



6. Microsoft To Do

A task management app that integrates with Outlook and other Microsoft 365 services. It's a simple yet effective tool for managing personal and team tasks.

Offering intelligent and personalised suggestions, and available on desktop and mobile, it's easy to stay on task, all day long.

Microsoft To Do is available as an add-on with all Microsoft 365 licenses.



7. Microsoft Sway

Microsoft Sway is a creative tool that allows you to create and share interactive reports, newsletters, presentations and more.

Spend less time formatting, as its built-in engine takes care of making your creations look its best. Start by adding your pictures, text and relevant content and Sway will do the rest, by showcasing information in modern, interactive and attention-grabbing ways.

Microsoft Sway is free to use and available in the Microsoft App store for anyone with a Microsoft account.



8. Microsoft Whiteboard

A digital canvas for collaboration, allowing team members to draw, write, and work together in real-time. Fully integrated to Microsoft teams. Choose from a range of templates to get started, or make your own, suitable for a specific project or team.

A great visual collaboration tool made to suit a range of teams.

Microsoft Whiteboard is free to use and available in the Microsoft App store for anyone with a Microsoft account

9. Microsoft 365 Groups

Microsoft 365 Groups lets you choose a set of people that you wish to collaborate with and easily set up a collection of resources for those people to share.

Resources such as shared Outlook inbox, shared calendar, or a document library for collaborating on files. Permissions are all taken care of, by adding a user to the group, they automatically receive access and permissions to all the tools required in the group.

Microsoft 365 Groups is available in the following licenses:

- Azure AD Premium P1 or higher
- Office 365 E3 License or higher
- Enterprise Mobility + Security E3 or higher
- Microsoft 365 E3 or higher

● ● Coming Soon with M365: Teams Chat from Outlook meetings!



This feature provides an easy Teams chat experience from Outlook in the context of a meeting for participants to send a quick message or review the chat.

A lending hand to Microsoft 365



At last count, the average business uses 187 various tools² across their departments. Users can spend up to a whopping 32 days³ a year just switching between those apps - a huge hit to productivity, especially for common tasks like the communicating via phone, routing of documents, forms, and contracts for approval and signature.

Our partners have the same challenges in their own operations, along with managing all the licenses and renewals for their customers or even just managing all the licences and renewals for your customer base. In this age of “app overload,” users want work to be simple and seamless.

You’ve already got your Microsoft 365 licensing in place, so now you just need applications that support, integrate and fill the gaps to help increase productivity.

Lets explore the vendors Crayon can offer to help you and your customers achieve this goal.



2. At Work | Technology Industry Trends 2023 | Okta

3. Report: App Overload Creating Chaos at Work (ringcentral.com)

Communication Solutions



Microsoft Teams is the global business communications platform of choice.

Access 4 brings together carrier grade infrastructure with Operator Connect for Microsoft Teams to provide a streamlined collaboration and customer experience.

Microsoft Teams calling offers a complete PBX replacement and an all-in-one business communication platform. Not having to switch between platforms will save you and your clients time and money.



Connect your business phone line in Microsoft Teams to make and receive public calls.



Extend a single number range across devices and access advanced telephony features through Microsoft Teams calling in Australia and NZ



Sync Microsoft Teams calls, video, chat and files seamlessly across all devices for simple distributed workforces.



Fast provisioning for no downtime and a familiar user experience for your team.

e-Signature Solutions

DocuSign

Recent research shows that 35% of SMBs are planning to adopt an eSignature solution within the next 2 years.⁴

SMBs are all about embracing the future, making things smoother and faster with digital signatures. It's like waving goodbye to old-school paperwork and saying hello to a whole new level of efficiency and productivity.

As more and more businesses catch onto this trend, now is the time to add an eSignature solution to your stack because it's clear that the way we handle documents is changing – for the better. So, get ready for a paperless revolution as SMBs lead the charge into the digital signature era!

Here are some top features DocuSign offers to help increase your productivity:

- **Templates:** automate your templates, allowing you to create a streamlined, repeatable process by using a standardised document to distribute agreements to multiple people, instead of recreating the document for every signature.
- **Automate the signing order:** DocuSign allows you to automatically assign the signing order, which eliminates the need for you to have to send it to each person one at a time, saving you time and effort.
- **Reminders:** Automatically set reminders to notify signers that the envelope is ready for them to complete, reducing time spent on unnecessary back-and-forth communication, and speeding up the entire process.
- **Integrate with Microsoft Teams:** With more and more organisations relying heavily on Microsoft Teams to stay connected and collaborate with colleagues, integration with Microsoft Teams has never been more critical. DocuSign eSignature makes it easy to sign policies, contracts, and other agreements without switching out of Teams.



4. The Future of Operations: Maximize the Value of Cloud with a Strategic Mindset: A Forrester Consulting Study Commissioned by rhipe, December 2022



Here are some top features SigniFlow offers to help you increase your productivity:

- **Workflow Automation:** SigniFlow's workflow automation capabilities enable the creation of customised signing workflows tailored to your business processes. By automating the signing order, you can define the sequence in which signatories receive documents, reducing bottlenecks and ensuring smooth document flow. Automated reminders can also be set up to prompt signatories who may have missed signing deadlines, further enhancing productivity.
- **Forms Builder:** SigniFlow offers a powerful forms builder that allows users to create customised digital forms with ease. This feature enables businesses to streamline processes such as employee onboarding, client intake, and data collection, eliminating the need for manual paperwork and reducing administrative overhead.
- **Secure Document Portal:** SigniFlow provides a secure document portal that offers a centralised and organised repository for storing and accessing signed documents. With SigniFlow's secure document portal, you can easily share documents with internal teams, external clients, and partners. This feature simplifies document sharing, enhances collaboration, and improves overall productivity, without the requirement of API integration.
- **Bulk Signing:** SigniFlow's bulk signing feature empowers users to efficiently sign large volumes of documents in one go, saving valuable time and effort. By utilising bulk signing in SigniFlow, users can process and sign multiple documents simultaneously, increasing productivity and streamlining workflows.
- **Integration with Productivity Tools:** SigniFlow offers complimentary plug-ins for popular productivity tools, including Microsoft 365's suite of applications such as Word, Excel, PowerPoint, SharePoint, and Teams.



Ensure and Secure Productivity

Do you have the right Microsoft 365 Licenses in place? Are you aware of the security inclusions with each license? We've broken it down for you to make it easy to understand. We're here to help you navigate the complex range of Microsoft 365 licensing options, understand the difference between SKU's, and maximise the value of the best-fit features for you and your customers.

Uplift for **SME Grade Security**

Uplift for **Enterprise Grade Security**

Microsoft 365 Business Standard

Best for transitioning from an On-Premise or Hosted Environment.

Recommended add-on for **Business Grade Security**

Microsoft Defender for Business
(Threat Protection)

Microsoft 365 Business Premium

Best for transitioning from Business Standard when a balance of Security and Remote Work is of key importance.

- Key Security Inclusions:**
- Azure Active Directory**
(Identity & Access Management)
 - Intune**
(Endpoint & App Management)
 - Microsoft Defender for Business**
(Threat Protection)
 - Azure Information Protection**
(Information protection)
 - Microsoft Defender for Office 365 Plan 1**
(Security & Compliance)
 - Microsoft Purview Data Loss Prevention**
(Security & Compliance)

Microsoft 365 Enterprise E3

Best for customers greater than 80 seats and where Security and Unified communications is paramount.

- Key Security Inclusions:**
- Azure Active Directory**
(Identity & Access Management)
 - Intune**
(Endpoint & App Management)
 - Microsoft Defender for Endpoint Plan 1**
(Threat Protection)

Microsoft 365 Enterprise E5

Best for customers who want unconditional access to Microsoft's entire list of Enterprise Security and Productivity features.

- Key Security Inclusions:**
- Azure Active Directory Plan 2**
(Identity & Access Management)
 - Intune**
(Endpoint & App Management)
 - Microsoft Defender for Endpoint Plan 2**
(Threat Protection)
 - Azure Information Protection**
(Information protection)
 - Microsoft Defender for Office 365 Plan 2**
(Security & App Compliance)
 - Microsoft Purview Data Loss Prevention**
(Security & Compliance)
 - Microsoft Defender for Cloud Apps**
(Cloud Access Security Broker)
 - Defender for identity**
(Threat Protection)

Coming Soon: Microsoft Copilot

Microsoft Copilot is a new AI-powered service that can help SMB customers maximize the value realized from their existing investments. Copilot can help with a variety of tasks, including:

- **Providing insights into how to improve productivity:** Copilot can analyze how users are working and provide recommendations for how to improve efficiency. For example, Copilot might suggest that a user create a new template for a document that they frequently create, or that they automate a process that they currently do manually.
- **Identifying security risks:** Copilot can scan a user's environment for potential security risks and provide recommendations for how to mitigate those risks. For example, Copilot might identify that a user is using an outdated version of software that is known to have security vulnerabilities.
- **Recommending new products and services:** Copilot can analyze a user's needs and recommend new products and services that might be helpful. For example, Copilot might recommend a new productivity app that would help a user be more efficient, or a new security solution that would help protect their data.



**Want to understand how
Crayon can help you?**

Check out our infographic - [10 Tips for MSPs to be sticky](#)