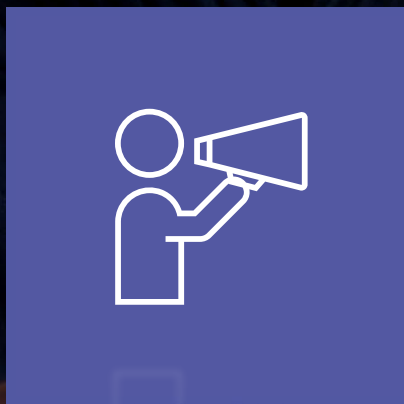




# Microsoft Teams for Marketing

Microsoft Teams



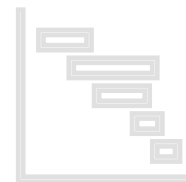


## In this playbook...

Find out how Microsoft Teams can enable personas across every major function and role in your organization to effectively navigate through daily high value scenarios with ease and confidence.

### Plan & Strategize

- Develop an Effective Go-To-Market Strategy
- Easily Manage and Track External Marketing Campaigns
- Manage Marketing Events As a Team
- Appointing a Brand Ambassador
- Monitoring Negative Response
- Devising a Digital Marketing Plan for Brand Building
- Plan and Carry Out a Successful Product Launch



### Collaborate & Design

- Crowdsource Marketing Ideas
- Collaborate with Sales to Create Successful Campaigns
- Coordinating Efforts Over New Retail Outlets
- Leverage Rich Visuals to Make your Work Shine
- Streamline Approval Processes with Real-Time Teamwork





# Plan & Strategize

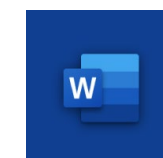
Check out how the Marketing team can use Microsoft Teams to keep your business running efficiently and address unexpected situations with confidence.

## Marketing Superpowers in Teams

### Capabilities and features used...

- Schedule meetings using synced calendars, or a meet now feature
- Participate in instant, open-channel communication
- Store documents within a cloud-enabled repository using Files section or channel tabs
- Create and co-author documents, spreadsheets, presentations and more in the cloud with Office 365
- Channel tabs for everyone to stay on the same page
- Help collaborate with teammates on multiple projects from within a single environment

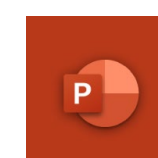
### Apps that enable an immersive experience in Teams



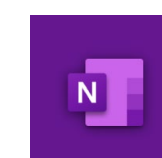
Word



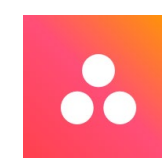
Excel



PowerPoint



OneNote



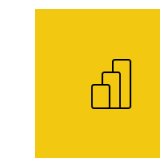
Asana



HunchBuzz



Forms



Power BI



Lucidchart



MailChimp



Calendar  
BOT



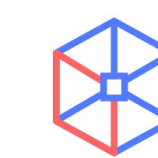
Google  
Analytics



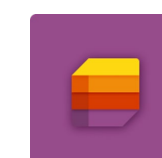
Adobe  
Creative  
Cloud



Presentations  
AI



Ment.io



Lists



Tasks by  
Planner  
and To Do



Prezi Video

# Meet the Business Decision Makers

## Marketing



### Marketing Manager

*"Marketing team's job is never done. It's about perpetual motion. We must continue to innovate every day."*

- Track and analyze the performance of advertising campaigns
- Manage the marketing budget and ensuring that all marketing material is in line with the brand identity
- Develop strategies to maximize profits and increase market share



### Event Manager

*"Planning without action is futile, action without planning is fatal."*

- Manage vendors or suppliers in a professional manner
- Ensure that the cost of an event is well within the budget agreed with a client
- Provide leadership and motivation in order to ensure synergy throughout the period of an event

# Meet the Business Decision Makers

## Marketing



### Market Analyst

*"A moment's insight is sometimes worth a life's experience."*

- Reporting to marketing managers and coordinators
- Monitoring customer bases and identifying new ones
- Preparing detailed reports on consumer behavior, competitors' activities, outcomes, and sales



### Social Media Manager

*"Don't use social media to impress people; use it to impact people."*

- Perform research on current benchmark trends and audience preferences
- Design and implement social media strategy to align with business goals
- Generate, edit, publish and share engaging content daily



# Develop an Effective Go-To-Market Strategy

## Marketing Manager

### Scenario Walkthrough

An effective Go-to-Market (GTM) strategy requires teamwork and communication to build successful product and service launches. Documentation must be findable and easily updated, and accessible to all team members, both internally and externally. The Marketing Manager needs to communicate with the regional team to analyze purchase trends, coordinate the creation of a marketing plan, and send it for approval. Teams enables her to track work items and ensures delivery of a viable and successful strategy.

- Attends and records a channel meeting with the regional marketing team members to discuss the task at hand.
- Shares a survey with the team to analyze market trends using Forms.
- Reviews a dashboard showing the purchase trends for the last quarter using Power BI.
- Creates and shares a PowerPoint presentation with a new marketing strategy based on the survey results.
- Receives an approval from the Finance Manager on the marketing budget.

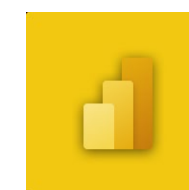
### How did Microsoft Teams help the Marketing Manager execute her roles and responsibilities?

- Microsoft Stream enables live streaming and video on demand (VOD) for team meetings, events and training.
- Get real-time feedback with quizzes, polls, and pre-built surveys with Forms.
- Create and analyze data with rich visual representations using Power BI.
- Build reports, documents, and presentations online in the cloud with PowerPoint.

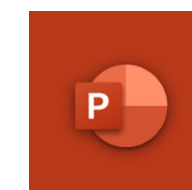
### Which app integrations on Teams made it possible?



Forms



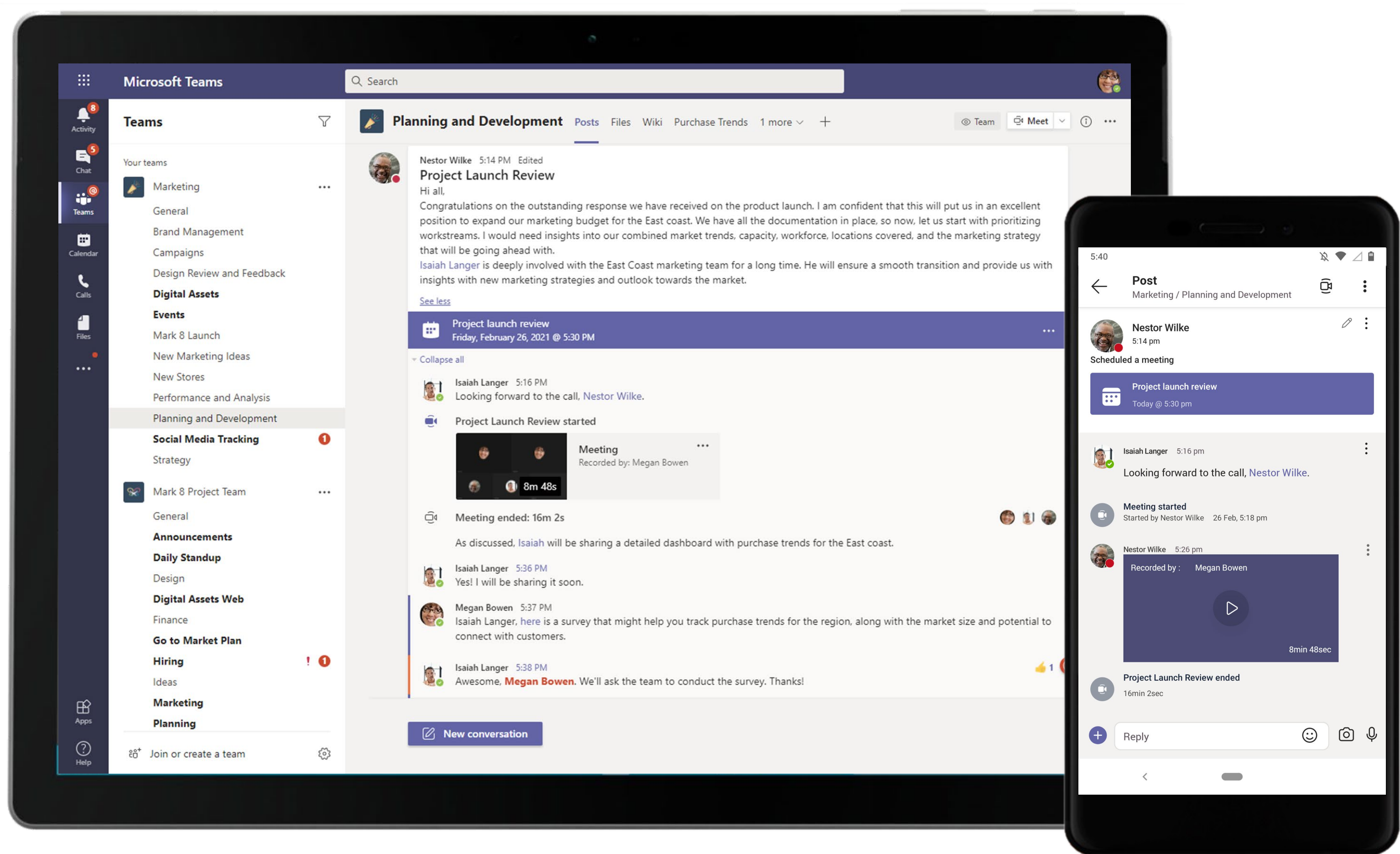
Power BI



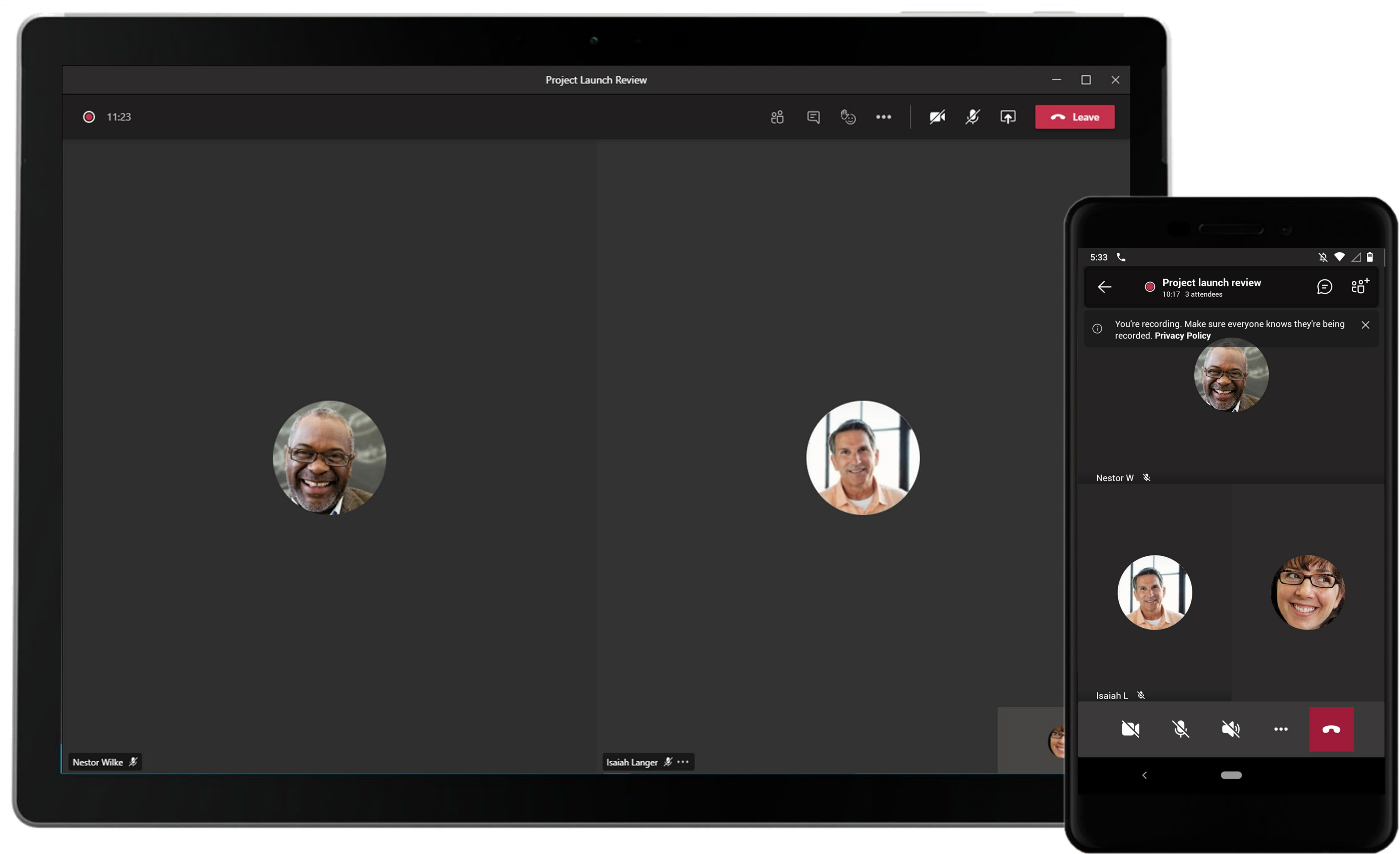
PowerPoint



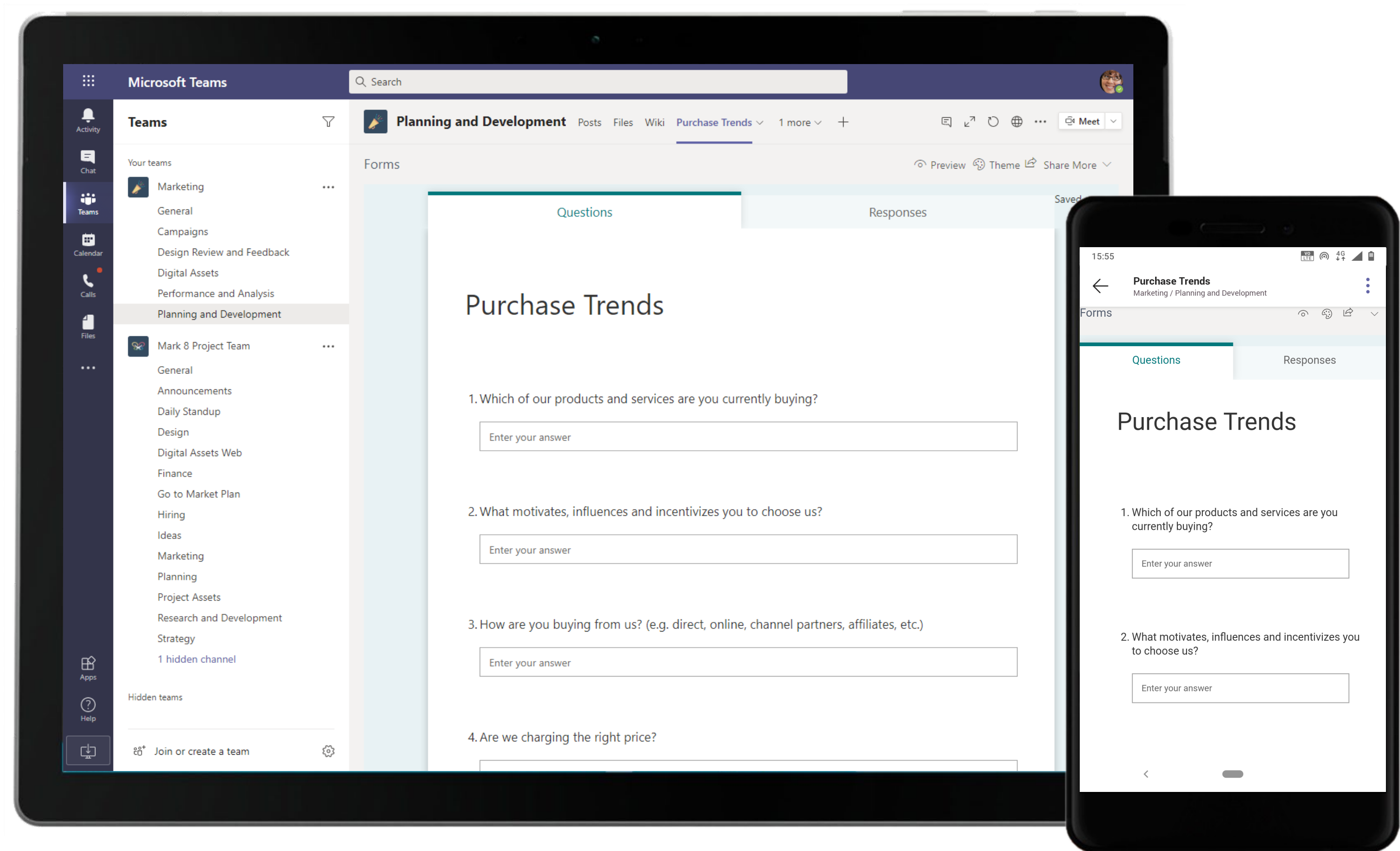
Microsoft Stream



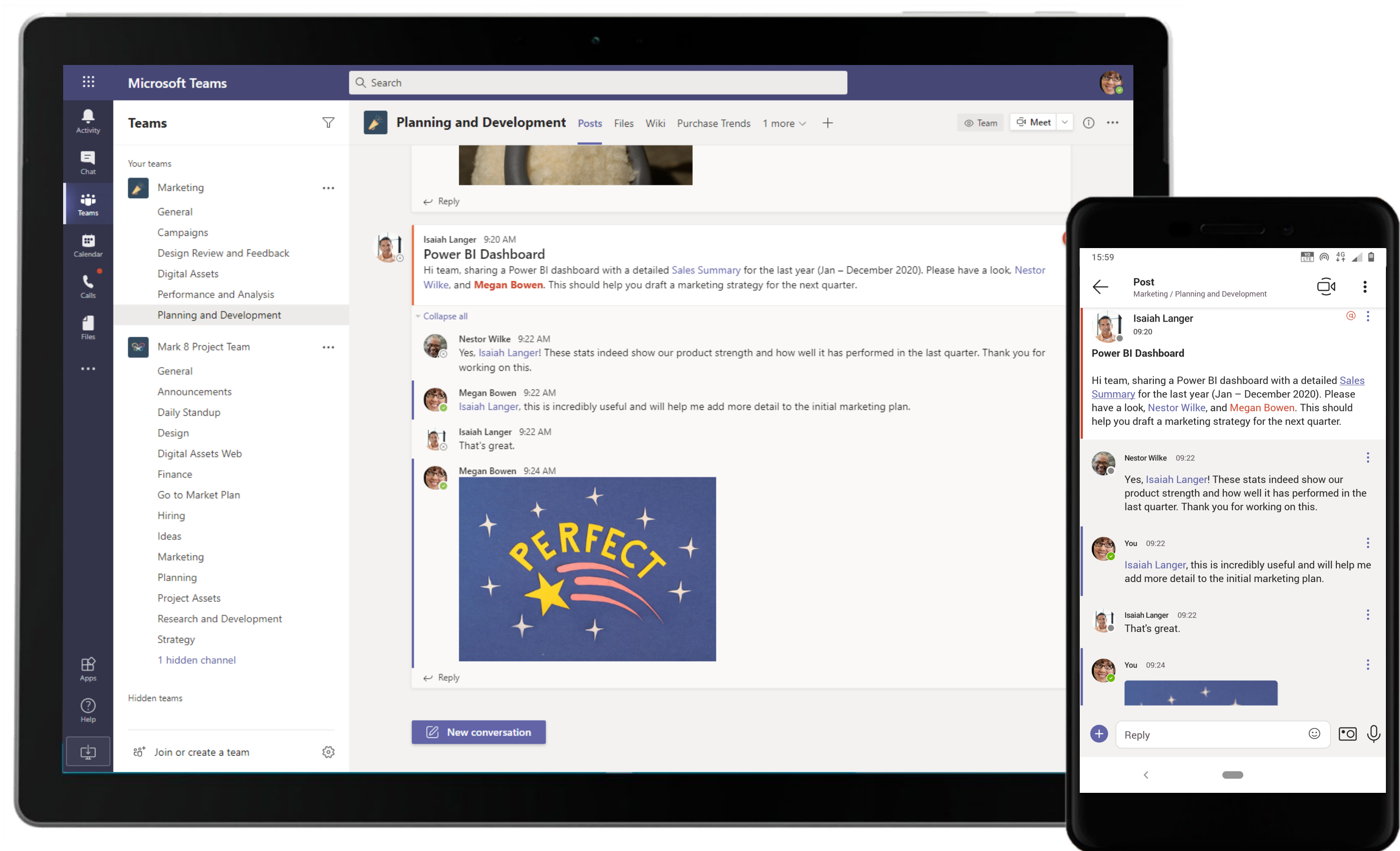
Collaborate with your team through channel communications using @mention to tag required personnel and keep conversations around the topic in a single thread. Meeting recordings can be accessed within the same thread too!



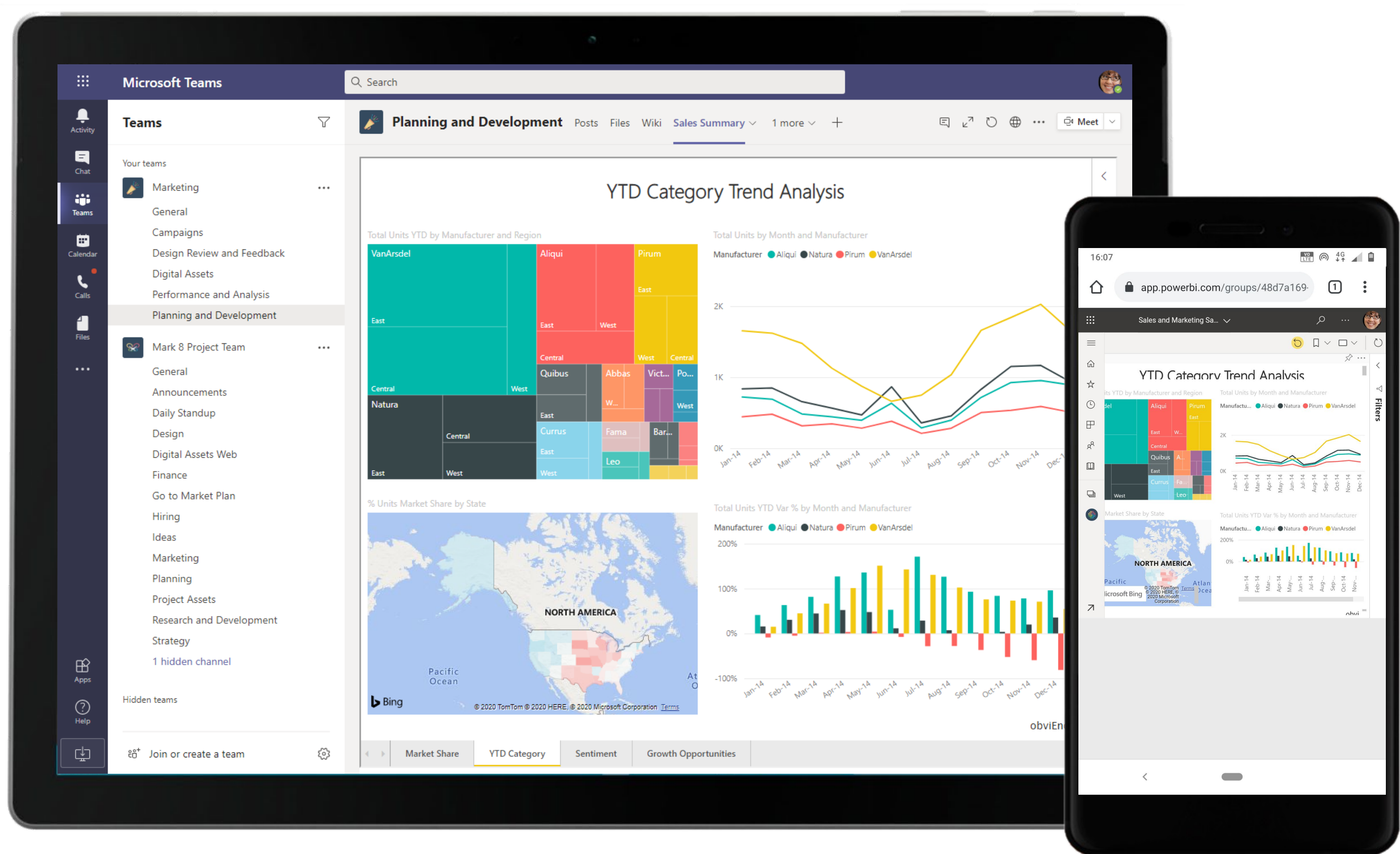
During a meeting, the participants can use rich meeting capabilities to make the meeting engaging and productive. Needless to say, meetings are fully supported on mobile clients too!



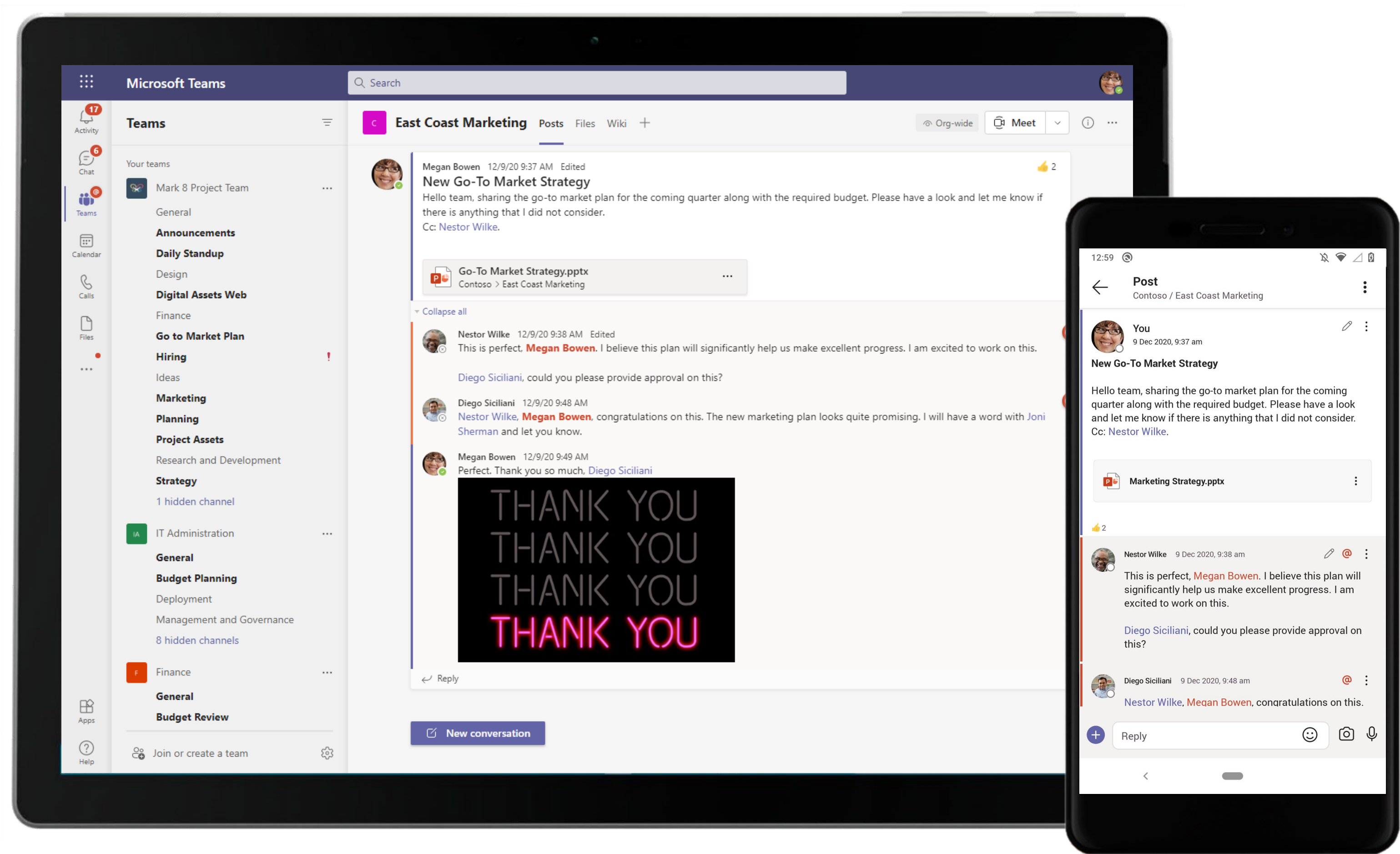
Easily create surveys, quizzes and polls with the integrated Forms application. The Marketing Manager shares a survey template with the team.



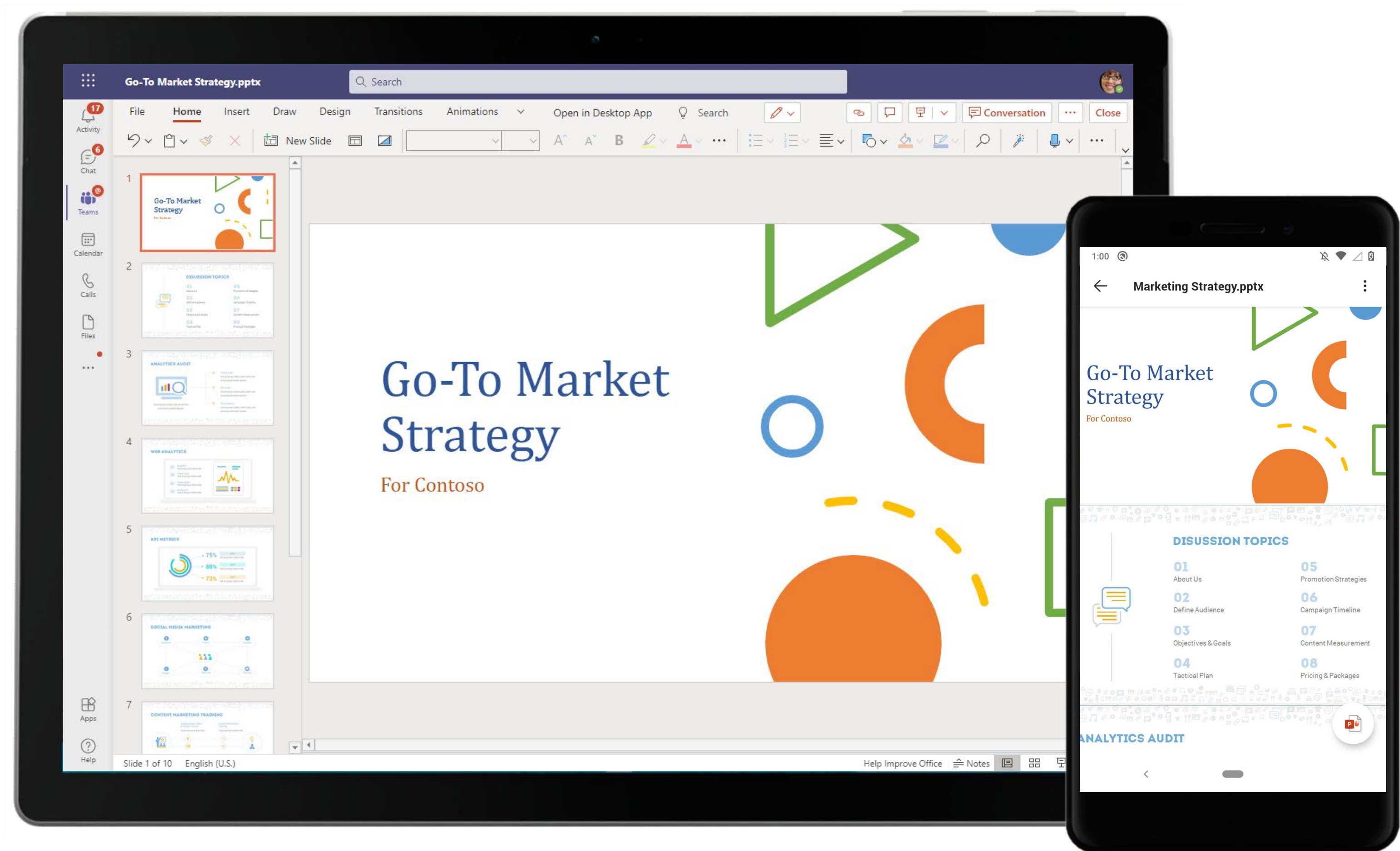
Microsoft Teams conversations are threaded so users can reply directly in-context to specific conversations, keeping relevant chats grouped together. @mention relevant team members to make sure you grab their attention in real-time.



Create and analyze data with rich visual representations using Power BI in Microsoft Teams.



Close out conversations in channels once your project objectives have been achieved. The files shared during the discussions will stay hosted within the Files tab in the channel.



Microsoft Teams makes it easy to share files within channels. If the files are Word, Excel, or PowerPoint files, your colleagues can even view, edit and collaborate on the files right within Teams, thanks to deeply integrated Office 365 services.



# Easily Manage and Track External Marketing Campaigns

## Marketing Manager

### Scenario Walkthrough

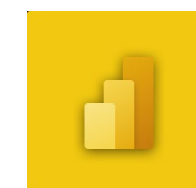
Creating an external marketing campaign means bringing together the right people and resources to launch it and tracking its performance. You need an easy way to create and manage your campaigns, track results, and share findings with stakeholders. See how the Marketing Manager leverages Microsoft Teams in combination with other apps to manage campaigns with ease.

- Sets up a meeting and invites key people to discuss the performance analysis of marketing campaigns.
- Adds Power BI in a channel tab to share the metrics for existing campaigns.
- Configures a Google Analytics tab to receive timely reports on the campaign numbers and analysis.
- Configures a MailChimp connector to receive reports of email marketing activity in a channel.

### How did Teams help the Marketing Manager execute her roles and responsibilities?

- Power BI helps facilitate data-driven decisions informed by visualizations and scoring within Microsoft Teams.
- Google Analytics delivers reports and other updates from services you use directly into a channel.
- Mailchimp enables you to stay updated with timely performance reports of your email marketing activity.

### Which app integrations on Teams made it possible?



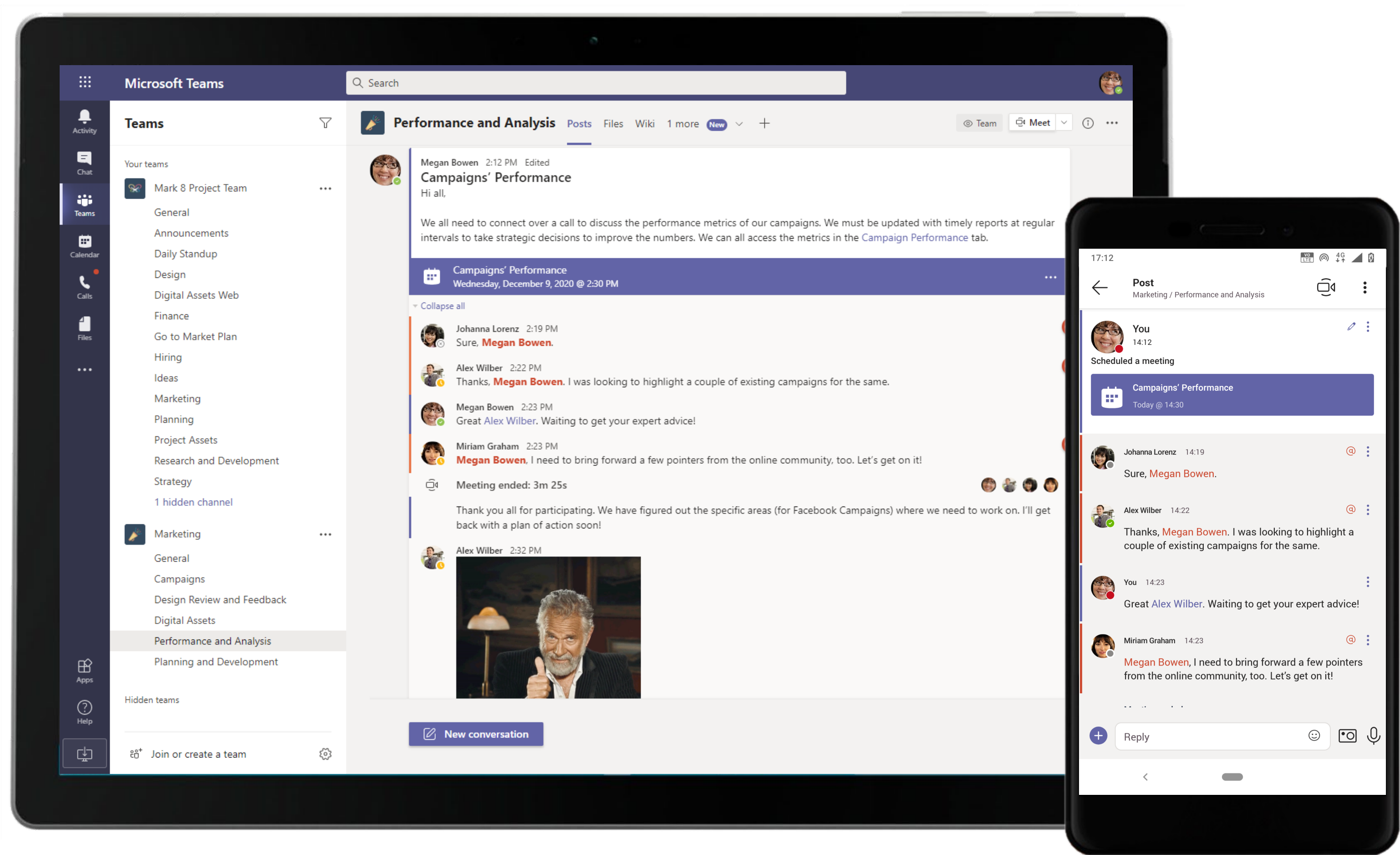
Power BI



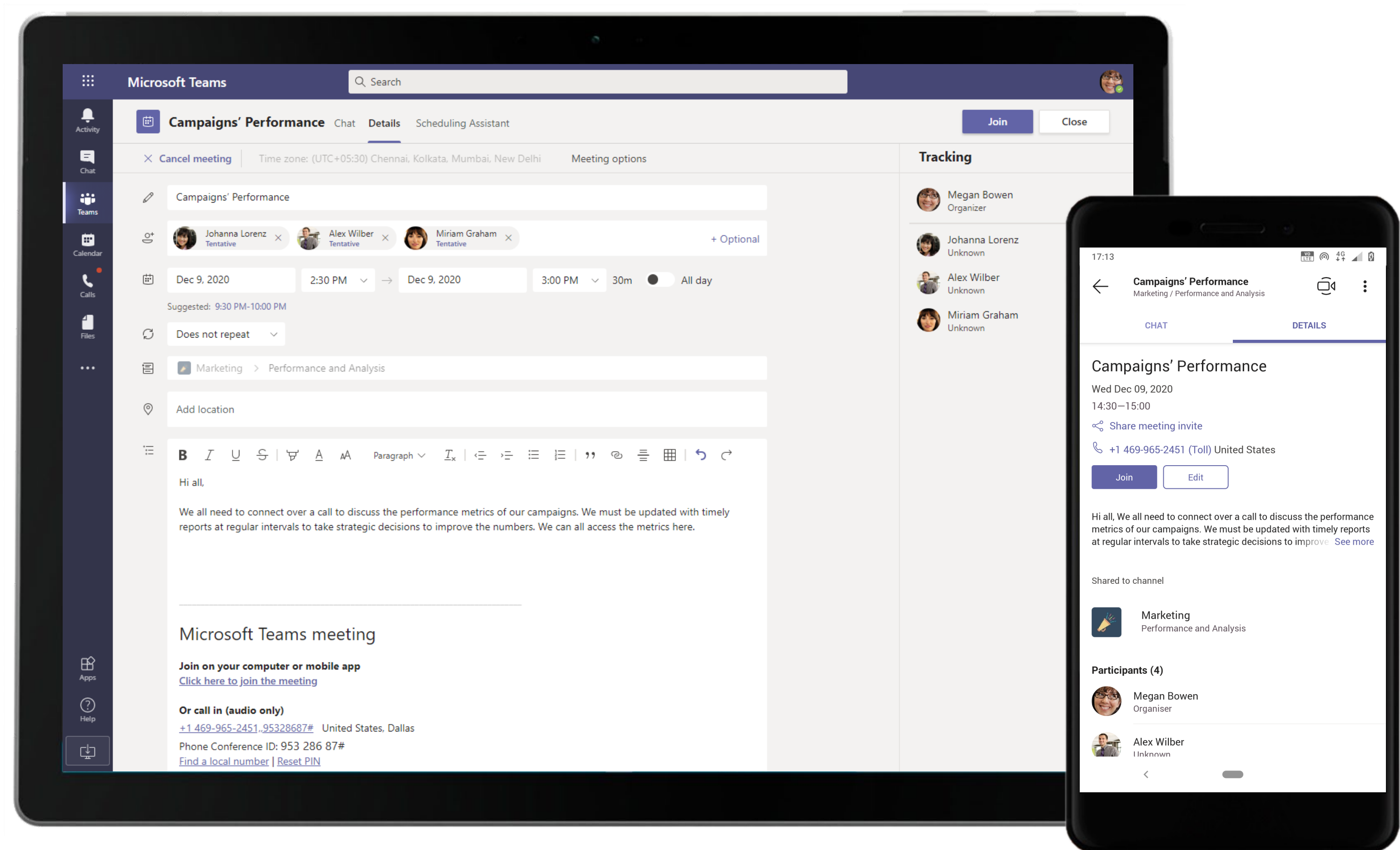
Google Analytics



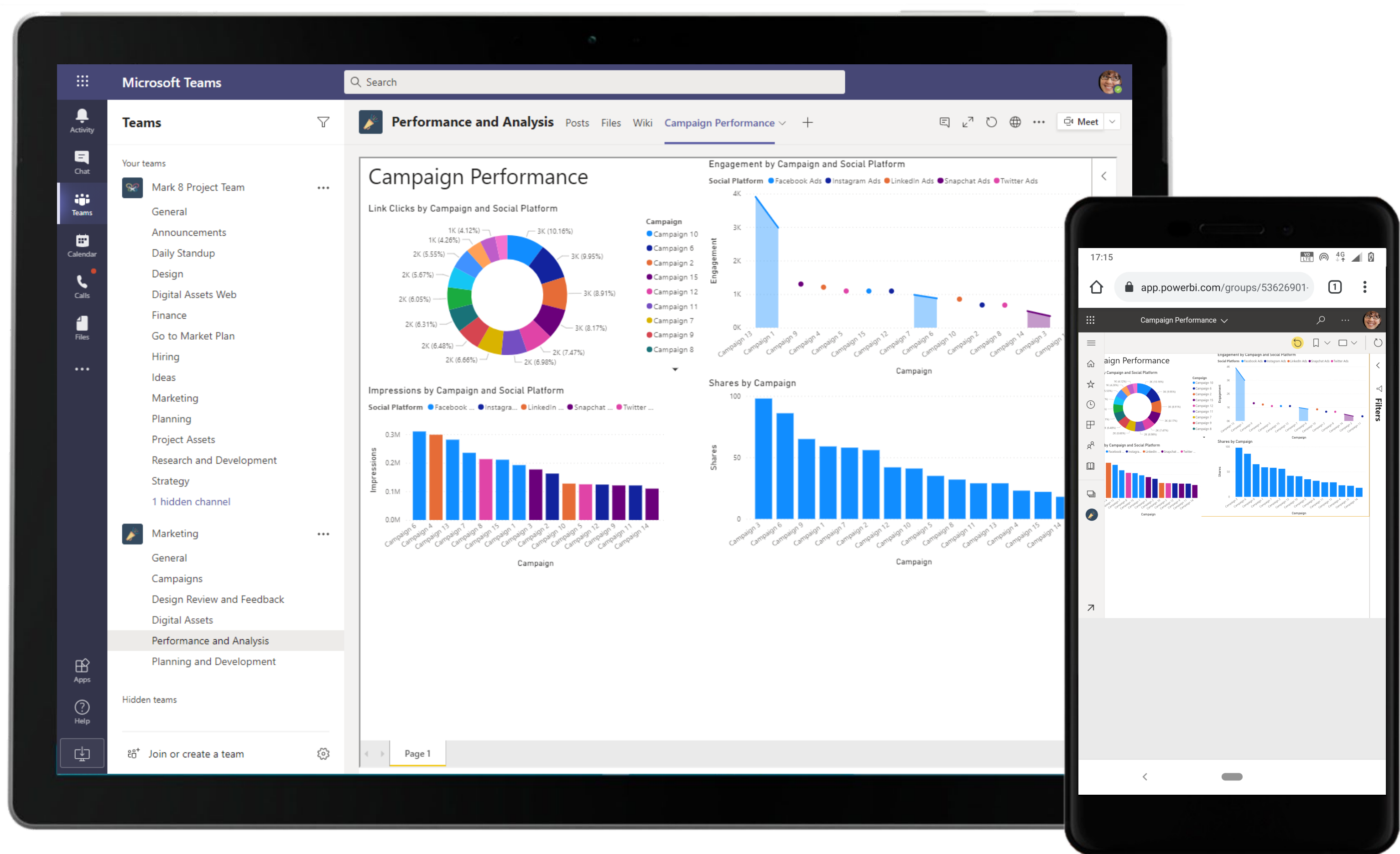
MailChimp



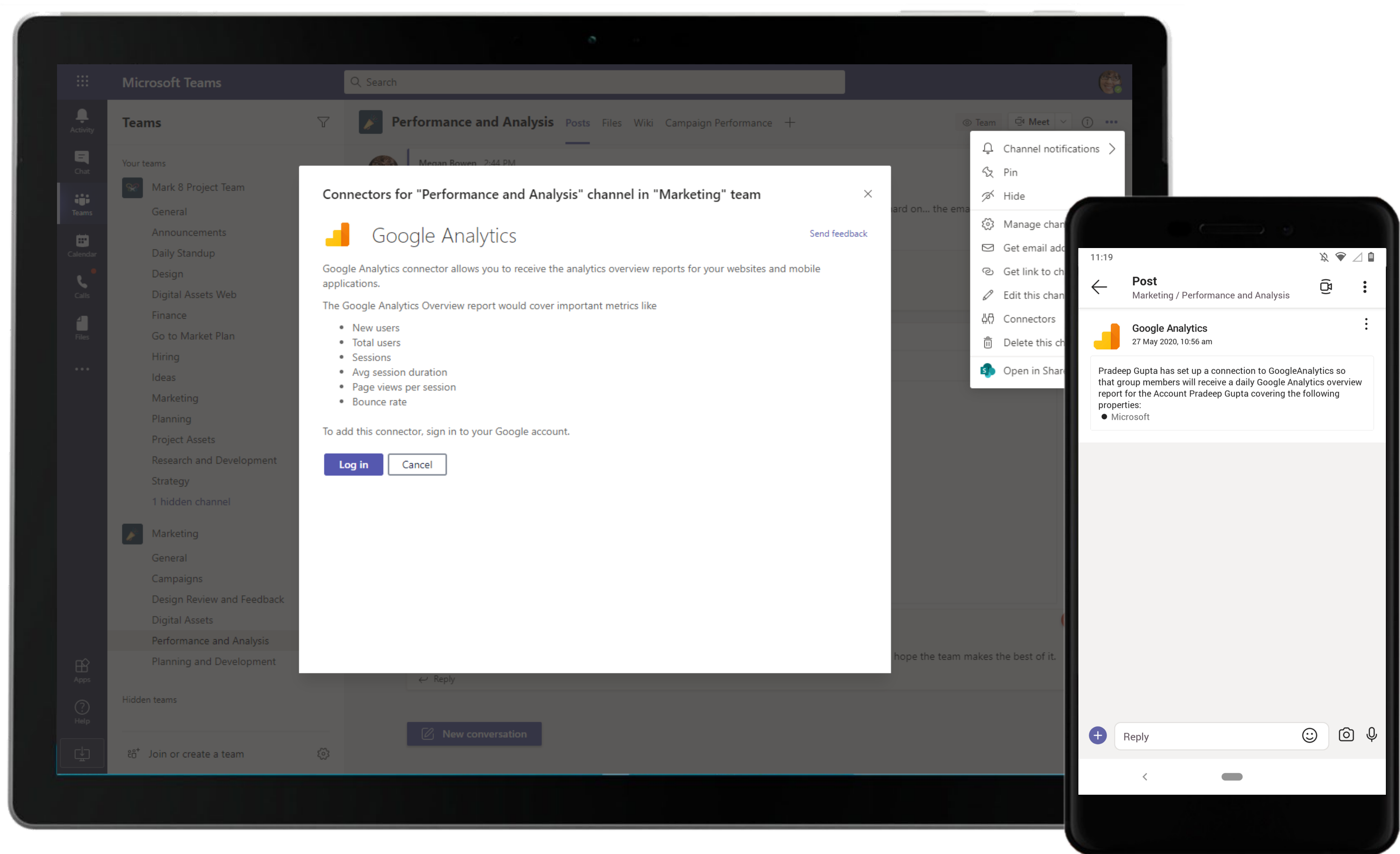
Collaborate with your team through channel communications using @mention to tag required personnel and keep conversations around the topic in a single thread. The team schedules meetings and shares files within the same thread too.



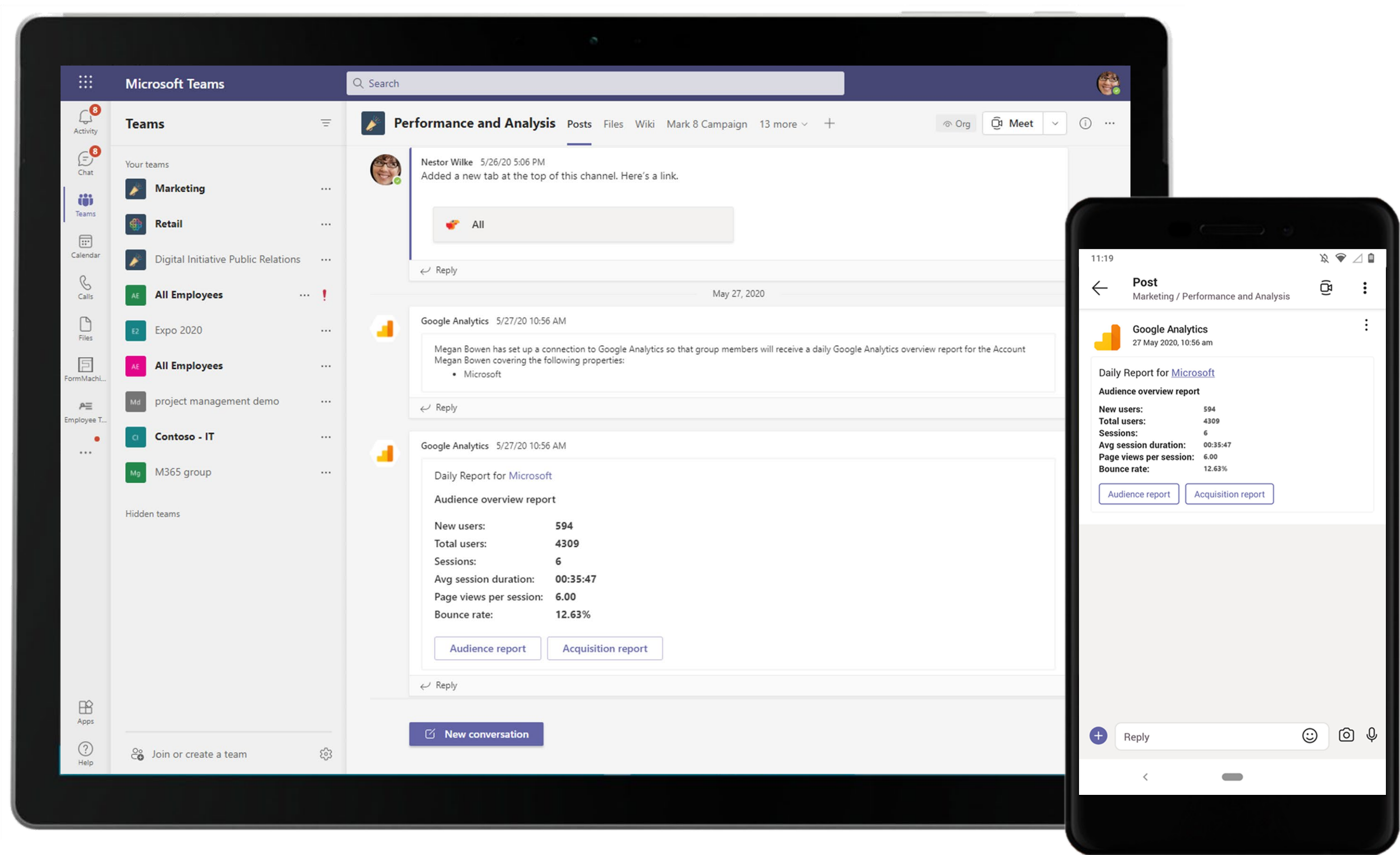
Complete meeting solutions in Teams support screen sharing, recording, video and audio conferencing. Scheduling Assistant feature suggests times that are optimal for all attendees.



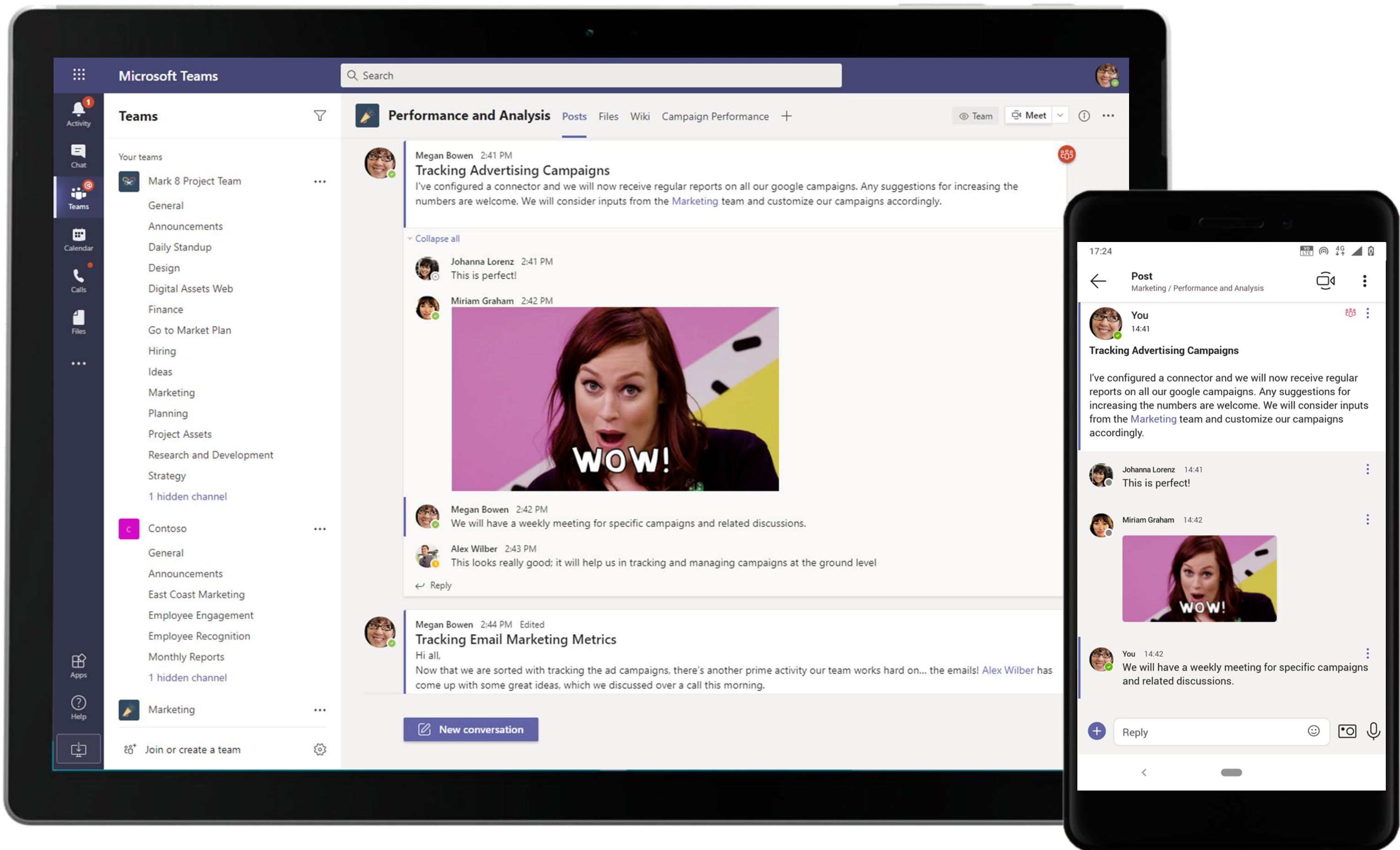
Facilitate data-driven decisions informed by visualizations in Power BI for Microsoft Teams. The Marketing Manager adds Power BI in a tab to share the metrics for existing campaigns.



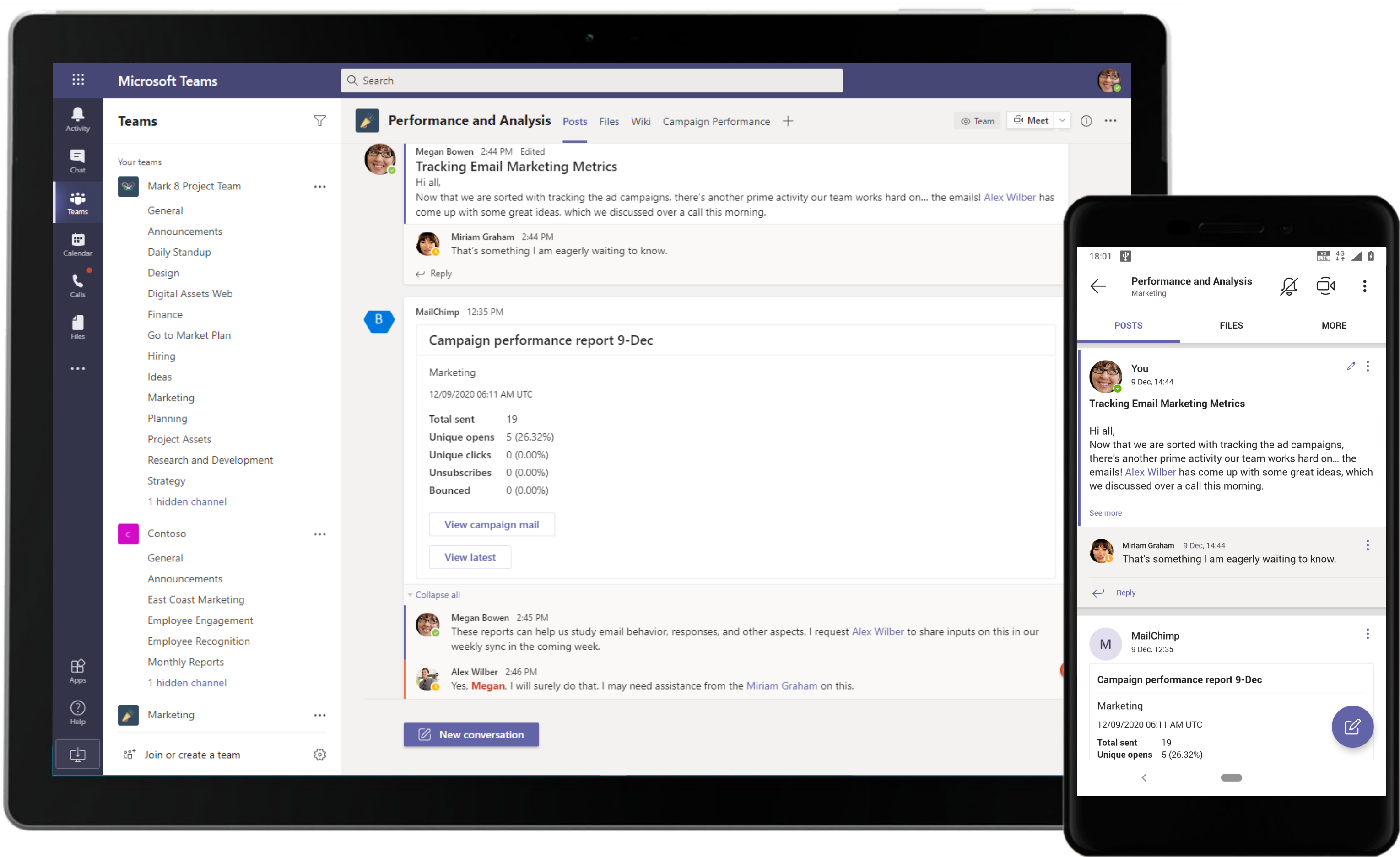
Google Analytics connector allows you to receive the analytics overview reports for your websites and mobile applications right in the channel. The Marketing Manager configures Google Analytics to receive timely reports for website performance,



The Google Analytics connector sends daily updates of the audience overview within a channel. Team members can discuss these stats and notifications within a channel thread.



Channel conversations can contain a lot of things – conversations, files shared by team members, meeting threads, and GIFs! Use social features like reacting to team members' conversations and responses to acknowledge them.



The MailChimp connector in Microsoft Teams sends notifications about your email marketing campaigns. The Marketing Manager configures the Mailchimp connector to receive reports of email marketing activity.



# Manage Marketing Events As a Team

## Event Manager

### Scenario Walkthrough

Successful marketing events need team support to be successful. You need one location to collaborate, coordinate, and execute strategies, and obtain instant access to team members for status and feedback. The Event Manager is responsible for ensuring that the Omega Xtreme event is hosted flawlessly within extremely tight deadlines. He uses applications and native features within Microsoft Teams to efficiently coordinate with team members and execute the plan with ease.

- Schedules a channel meeting to brainstorm ideas and work out a strategy to conduct a successful event with tight deadlines.
- Reviews the meeting notes shared in a OneNote channel tab.
- Responds to a channel thread regarding potential event locations and suggests finalizing the location with a poll via Polly.
- Views location details shared using Places and gives the team a go-ahead on the final event location.
- Reviews, edits, and approves the event budget shared in chat via Excel.
- Configures a content registration app using Power Apps and notifies the company of the event.

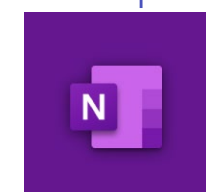
### How did Microsoft Teams help the Event Manager execute his roles and responsibilities?

- Create custom applications without code as per your requirements to seamlessly manage complex processes using Power Apps.
- Ask your team questions with Polly and get instant answers in Microsoft Teams.
- Easily search and share location data with your team using Places.

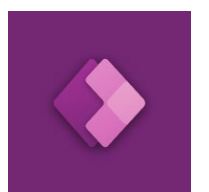
### Which app integrations on Teams made it possible?



Places



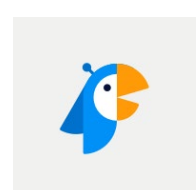
OneNote



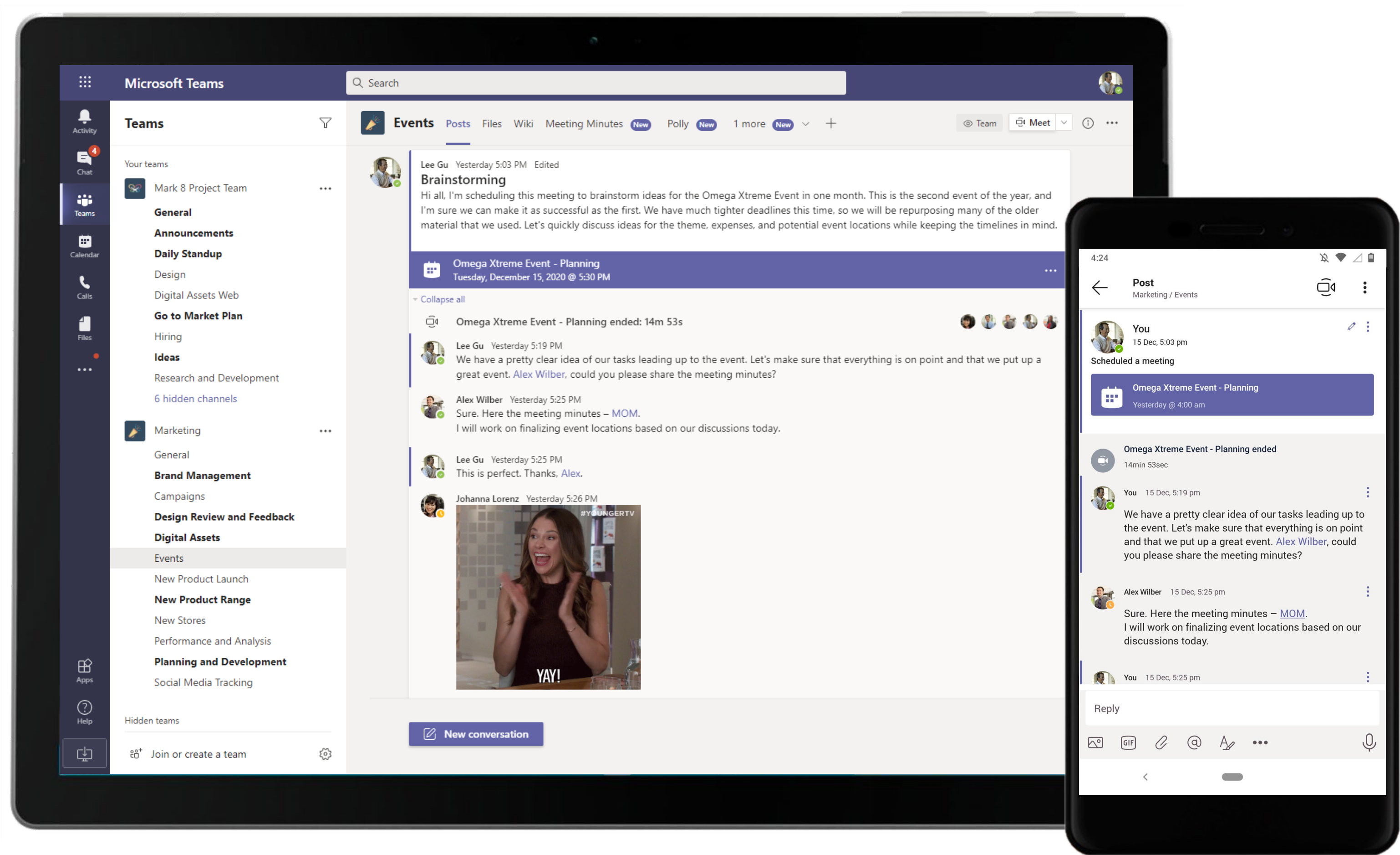
Power Apps



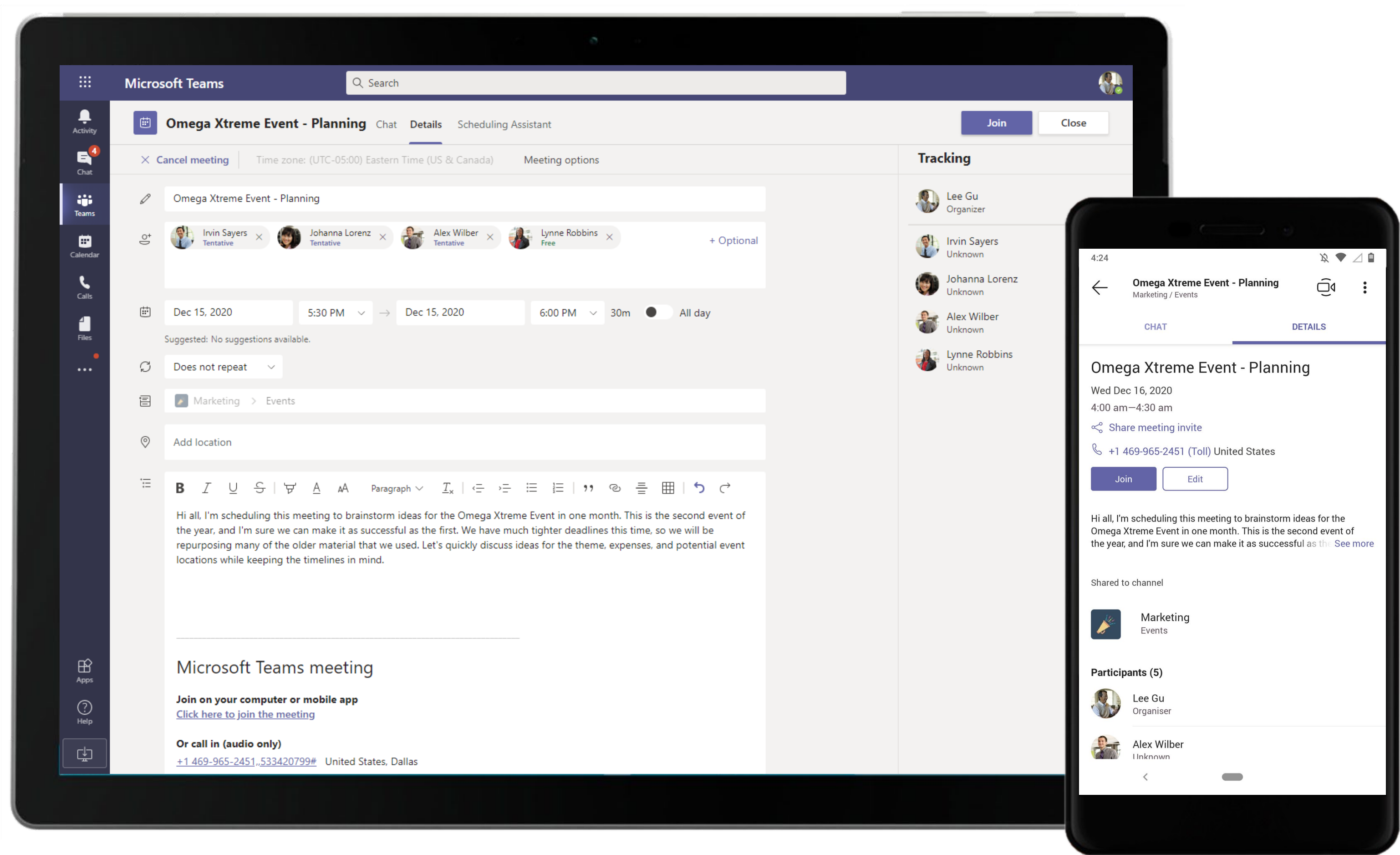
Excel



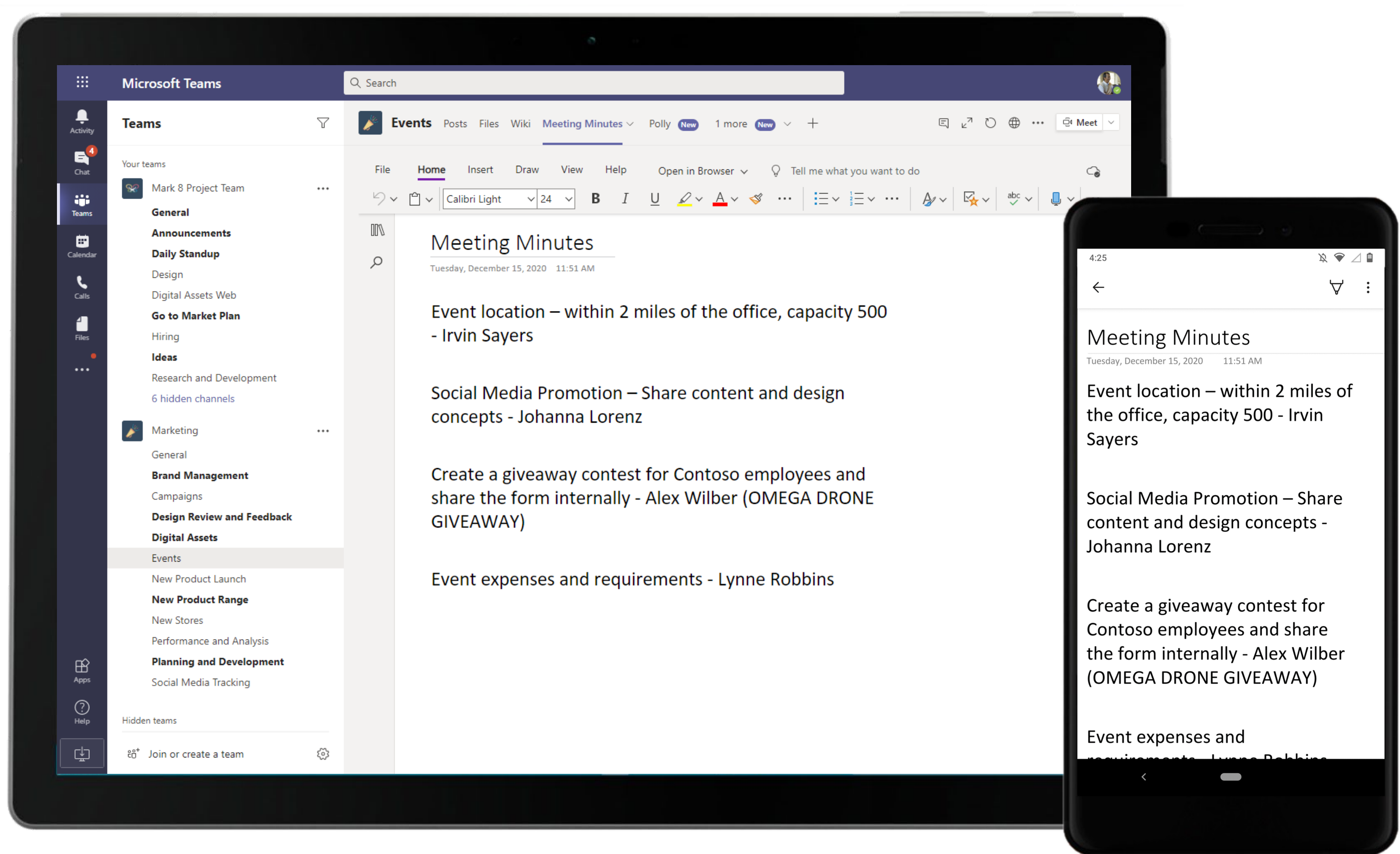
Polly



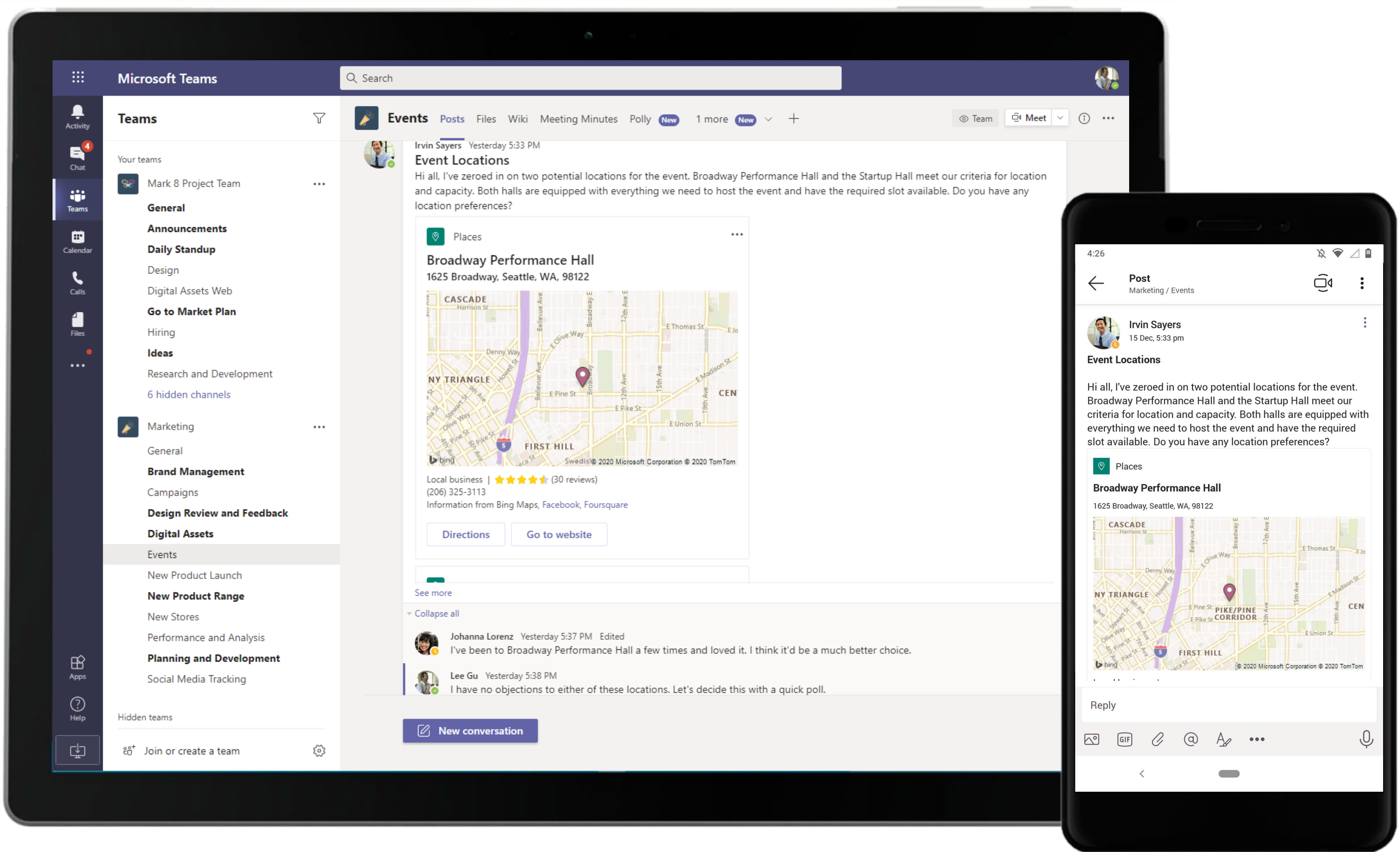
The Event Manager kicks off planning over an online meeting and the team keeps conversations and relevant documents all in the meeting thread for easy reference.



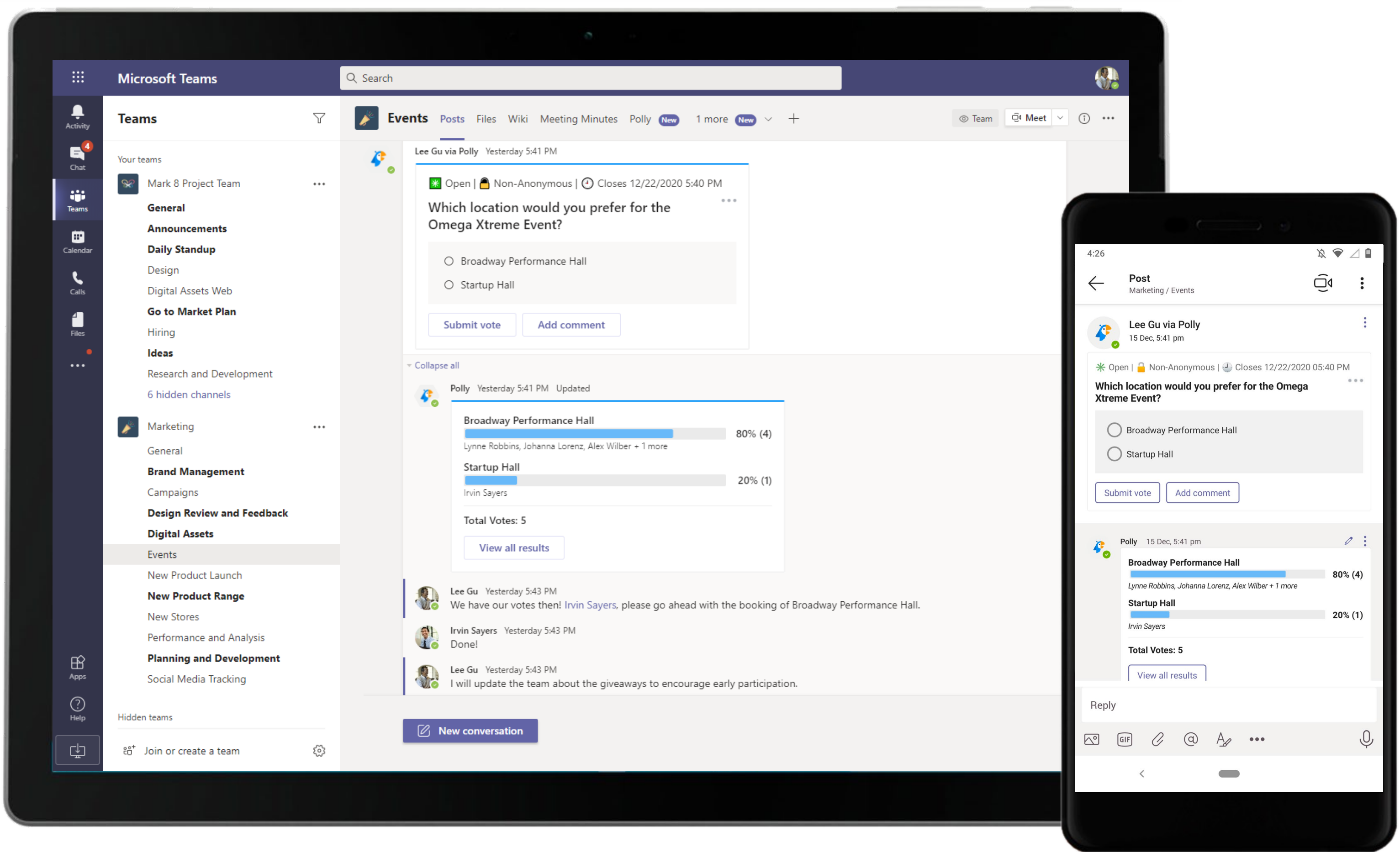
A meeting is set up in the channel for brainstorming and a meeting invite is sent to relevant team members and decision makers.



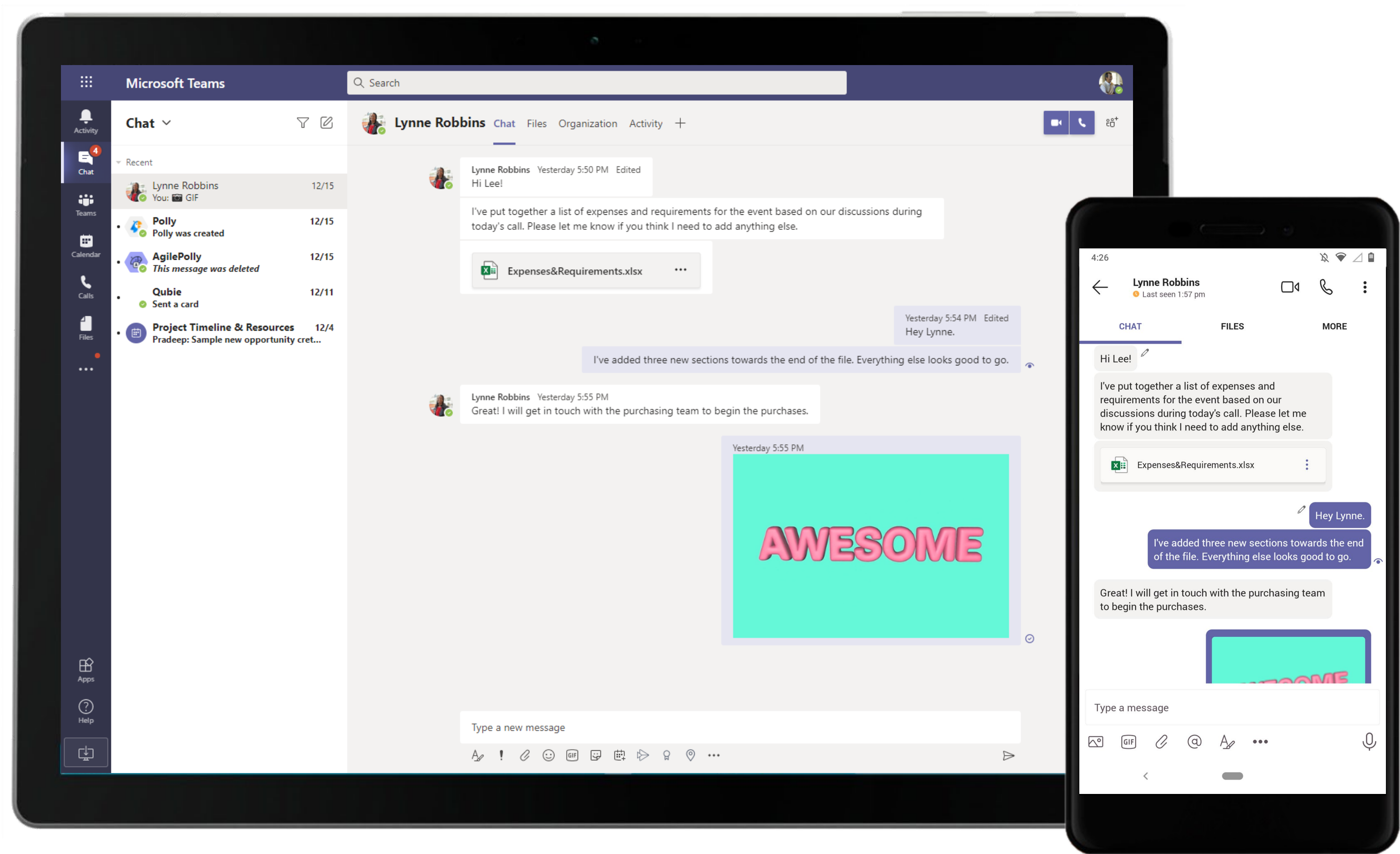
Quickly disseminate meeting outcome and notes among team members with OneNote tabs in channels. The OneNote link is shared in the meeting thread after the meeting.



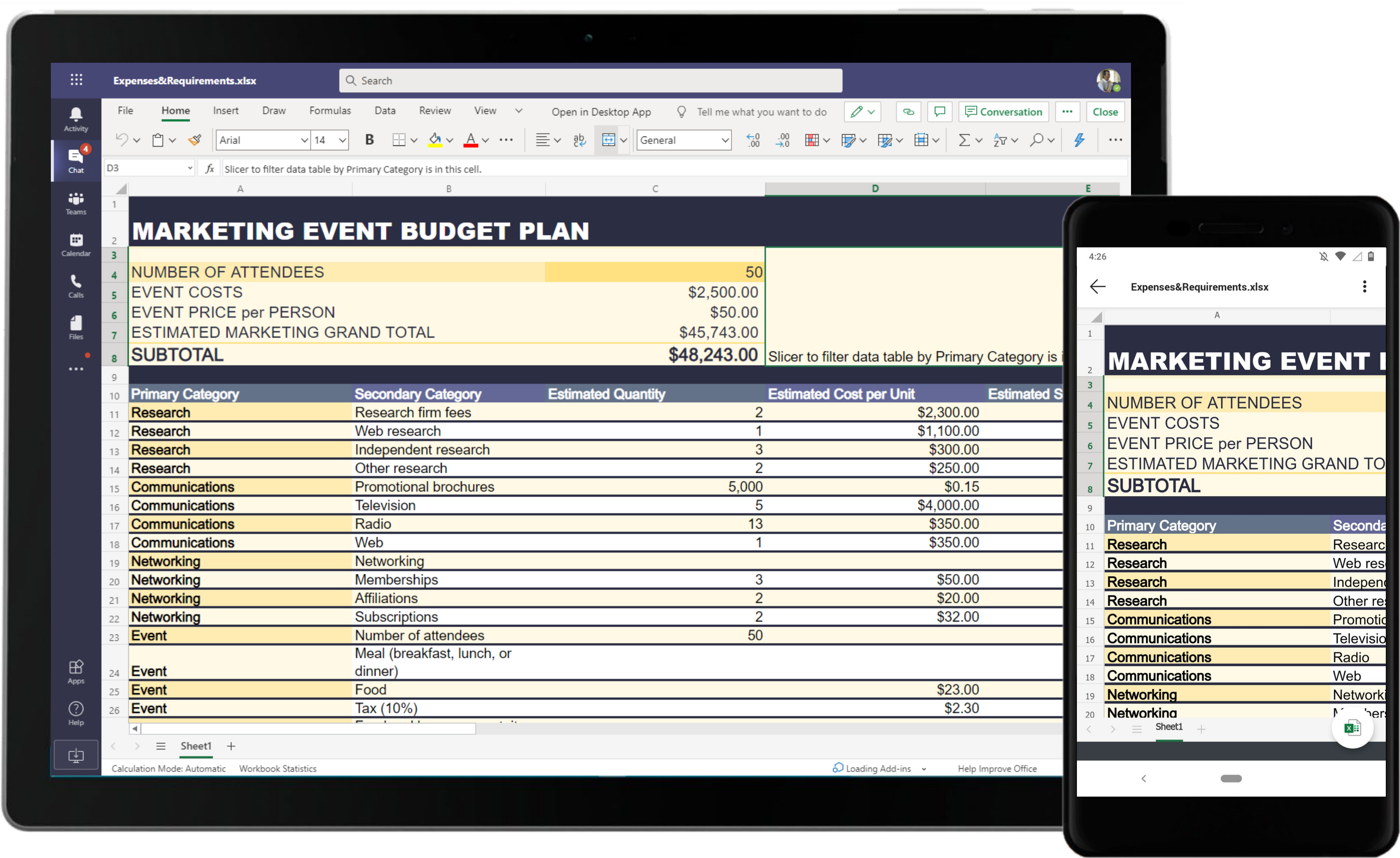
Once the Event Manager identifies two potential locations for the event, he posts an announcement in the channel tagging the location using Places in Microsoft Teams.



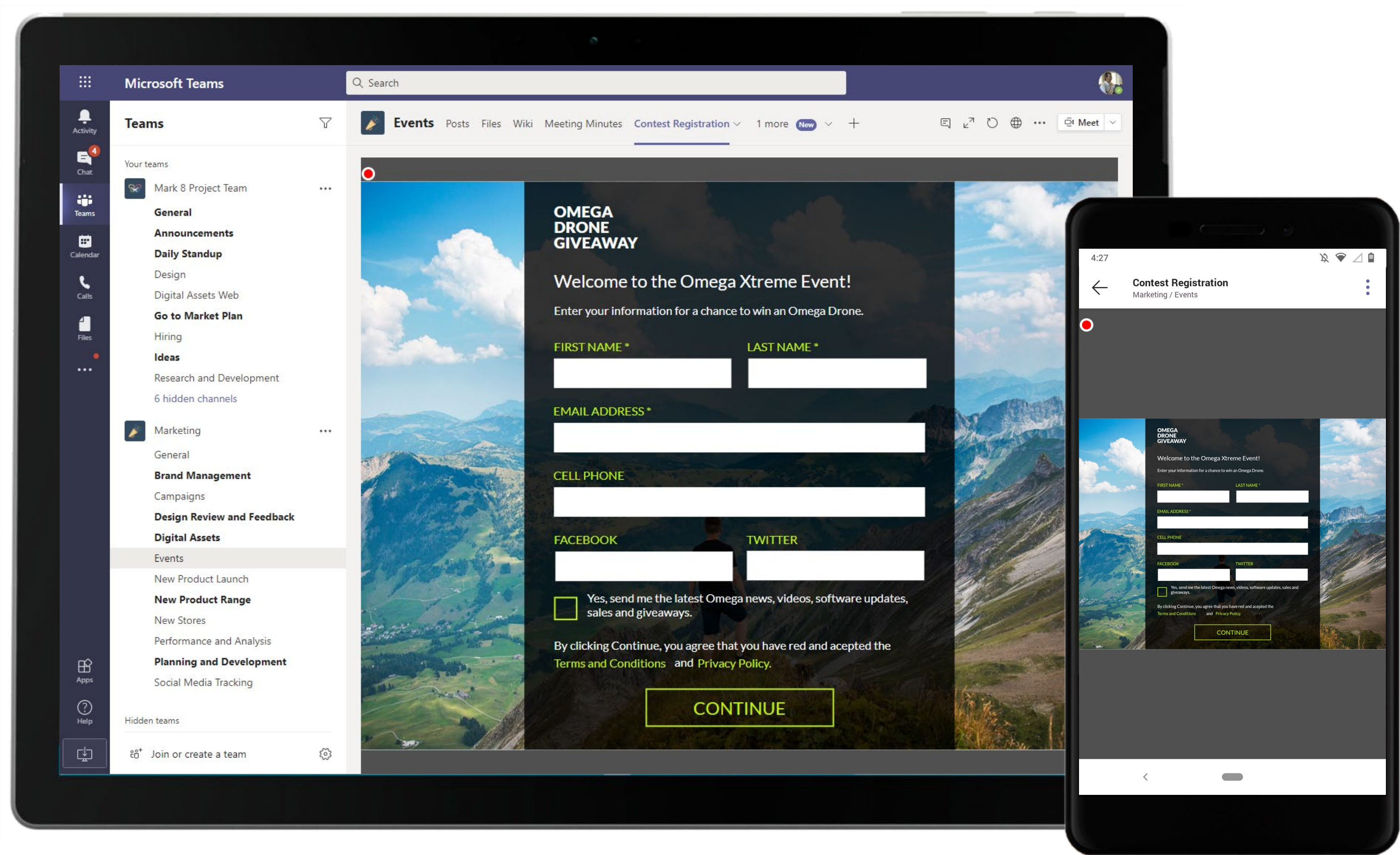
Polly is a Microsoft Teams polling solution that works where your team works best. Intuitive polls designed to help you do your best work!



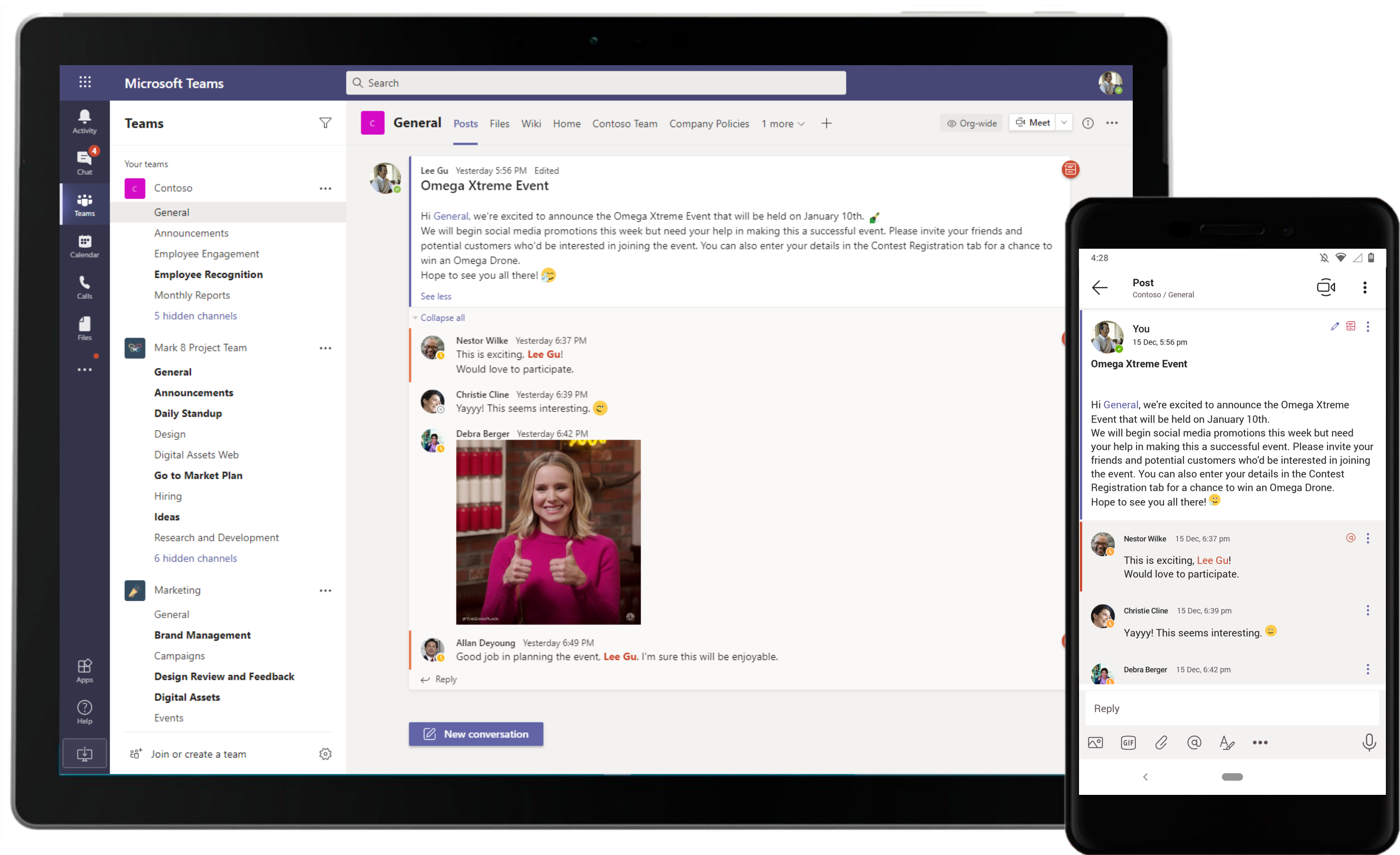
Quickly reach out to and chat with co-workers. Take conversations offline from channels for 1:1 discussions, just like the conversation here between an employee and the Event Manager.



The team member uses Excel to build and present data to the Event Manager. Create impactful summaries of crucial data with Excel, Word and OneNote for Microsoft Teams.



Create custom applications without code as per your requirements to seamlessly manage complex processes using Power Apps. The Event Manager configures a content registration app in the channel using Power Apps.



Close out conversations in channels once your project objectives have been achieved. The files shared during the discussions will stay hosted within the Files tab in the channel.



# Appointing a Brand Ambassador

## Marketing Manager

### Scenario Walkthrough

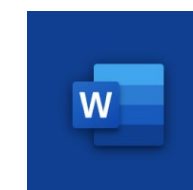
Contoso is developing a luxury project in an elite neighborhood. To promote the project and attract the right customer base, the company has decided to hire a renowned face as their brand ambassador. The Marketing Manager collaborates with her team using Microsoft Teams to identify the right celebrity and seal the contract.

- Initiates a channel conversation by sharing the project brief in a Word document.
- Schedules a meeting to brainstorm virtually with team members using Freehand by InVision.
- Reviews a PowerPoint deck shared by a team member containing details of shortlisted celebrities.
- Reviews the celebrity list with the leadership team to pick the brand ambassador.
- Requests the Operations Manager to create the agreement and shares a signed copy of the same via Adobe Sign.

### How did Teams help the Marketing Manager execute her roles and responsibilities?

- Utilize Word to compile project brief and other important information.
- Collaborate, ideate, and draft solutions with team members in real-time using Freehand by InVision.
- Share concise presentations with team members using PowerPoint.
- Execute contracts via Adobe Sign without leaving Teams.

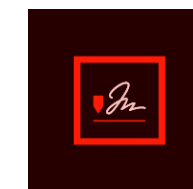
### Which app integrations on Teams made it possible?



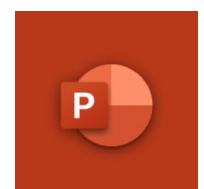
Word



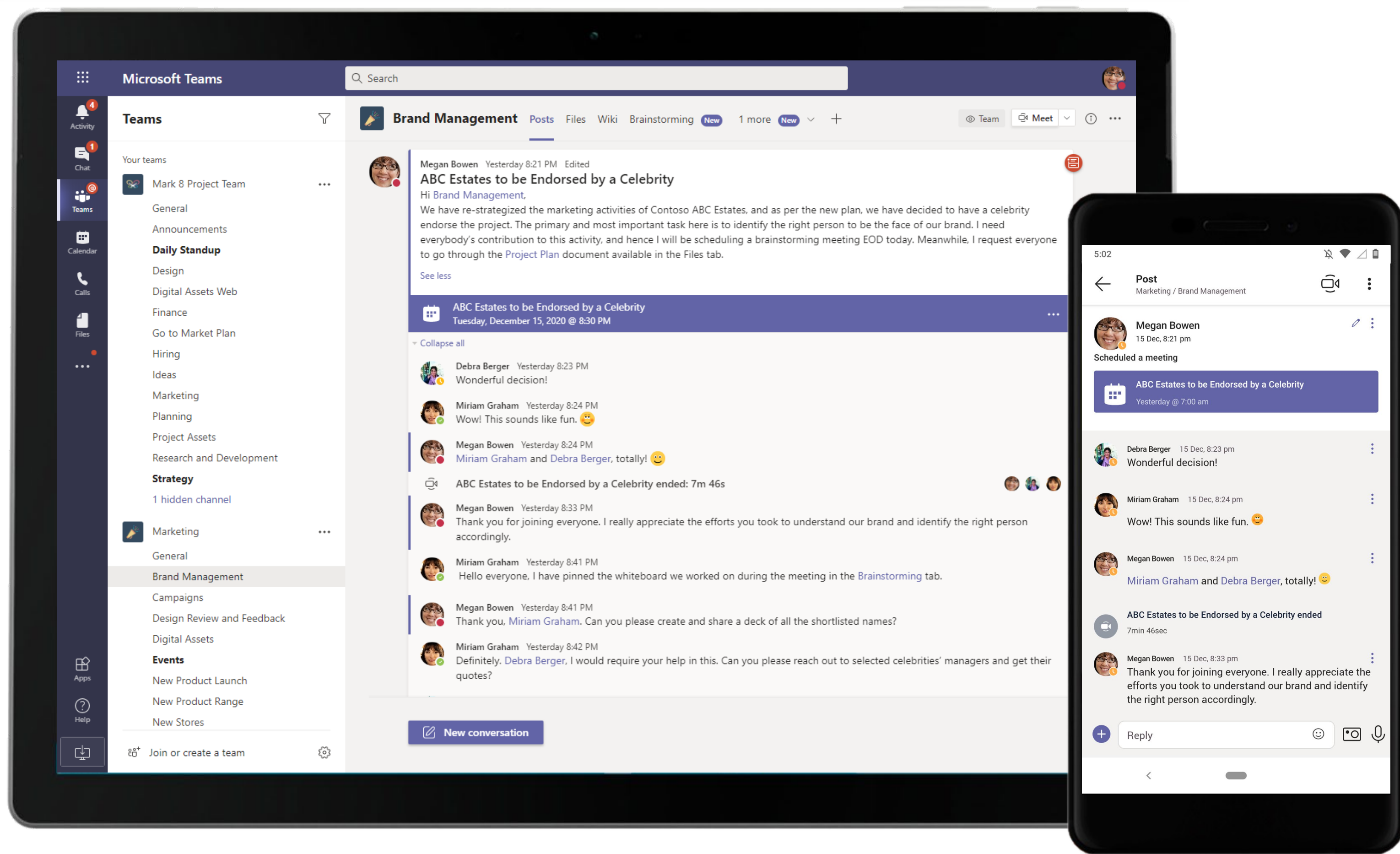
Freehand by  
InVision



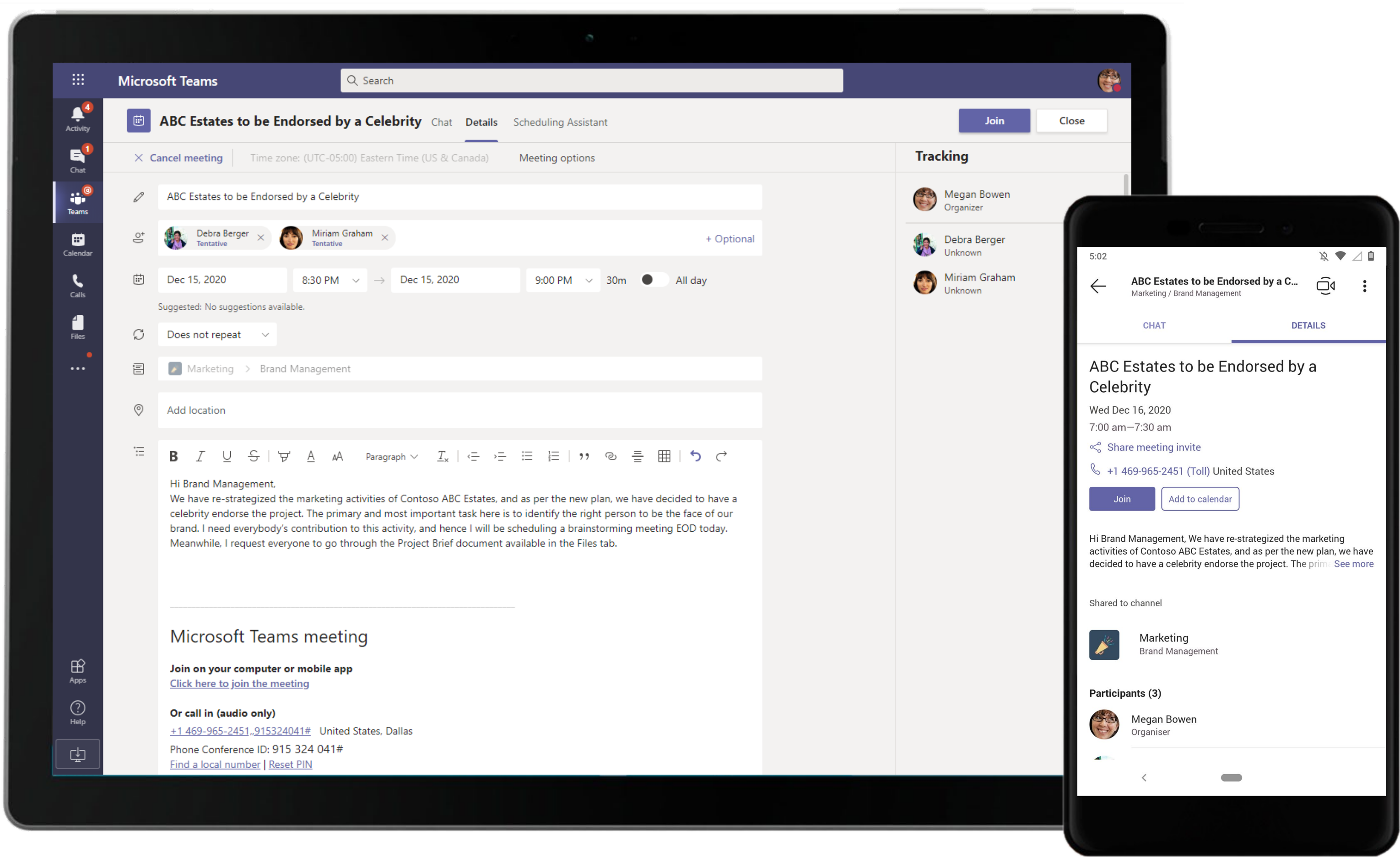
Adobe Sign



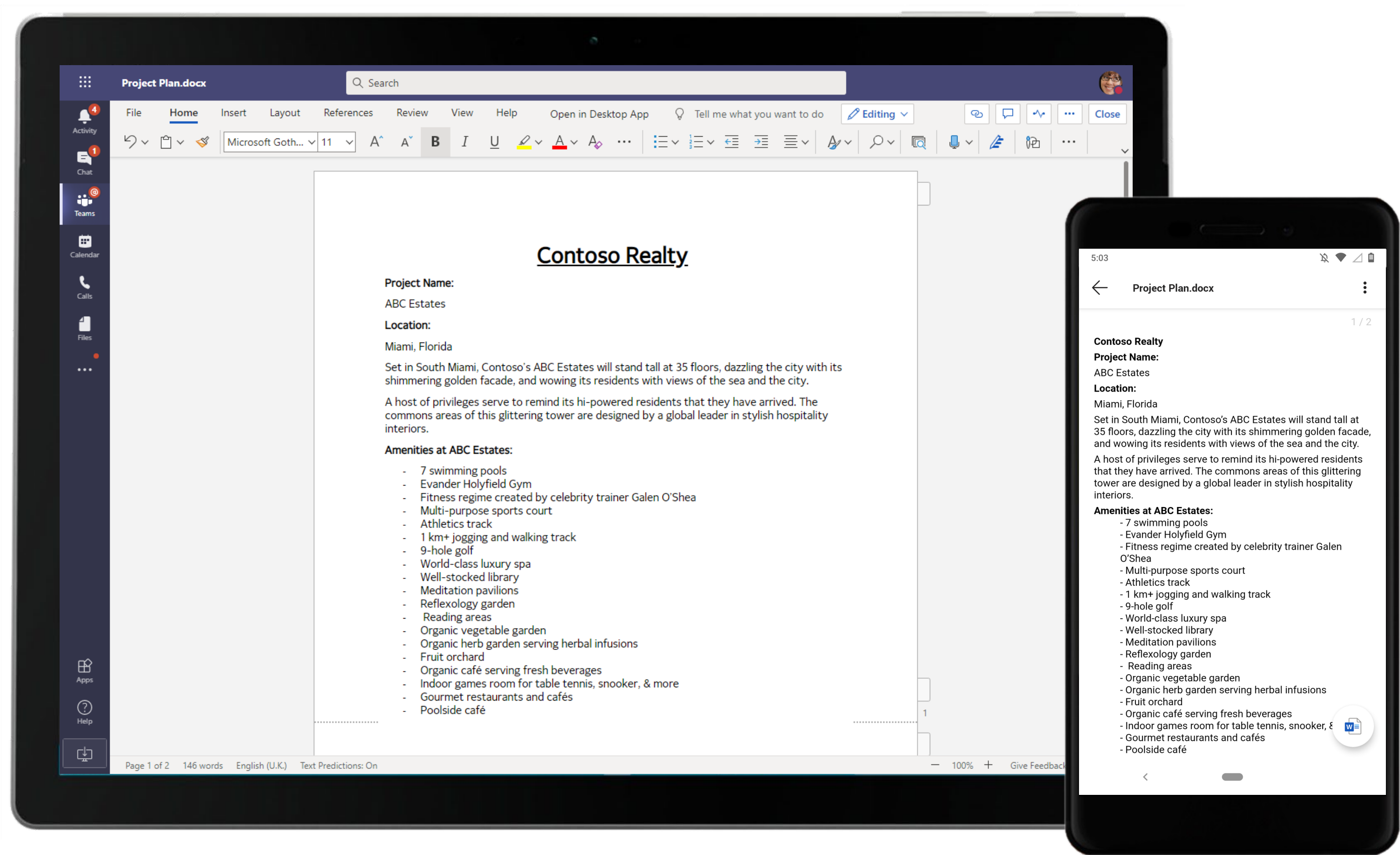
PowerPoint



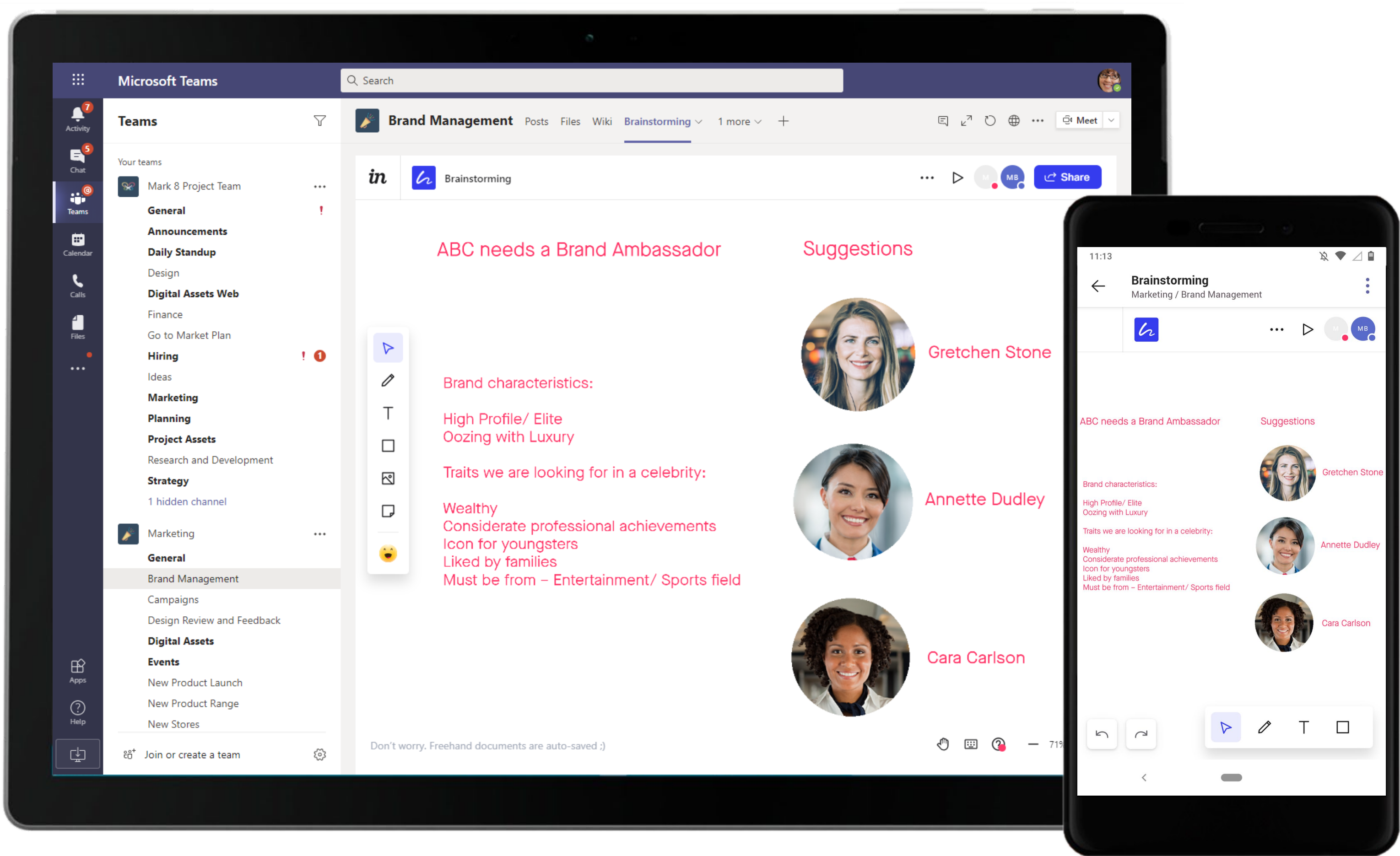
Keep conversations and relevant documents all in one place with Microsoft Teams. The Marketing Manager provides context to the meeting by sharing the project brief and continues to interact with her team on the same thread.



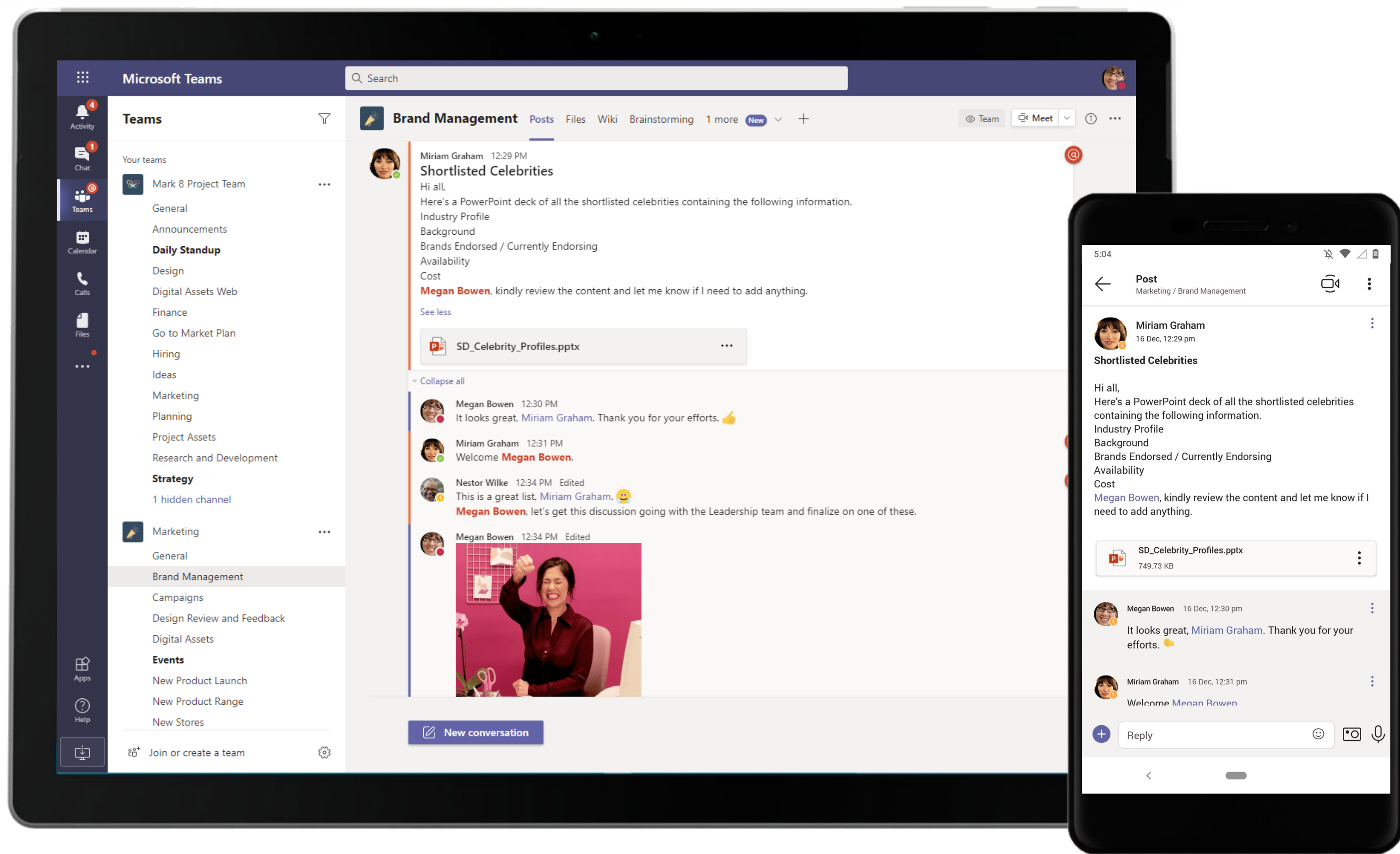
When the Hiring Manager creates a meeting invite, she can use the native scheduling calendar to check for optimal meeting time for all attendees.



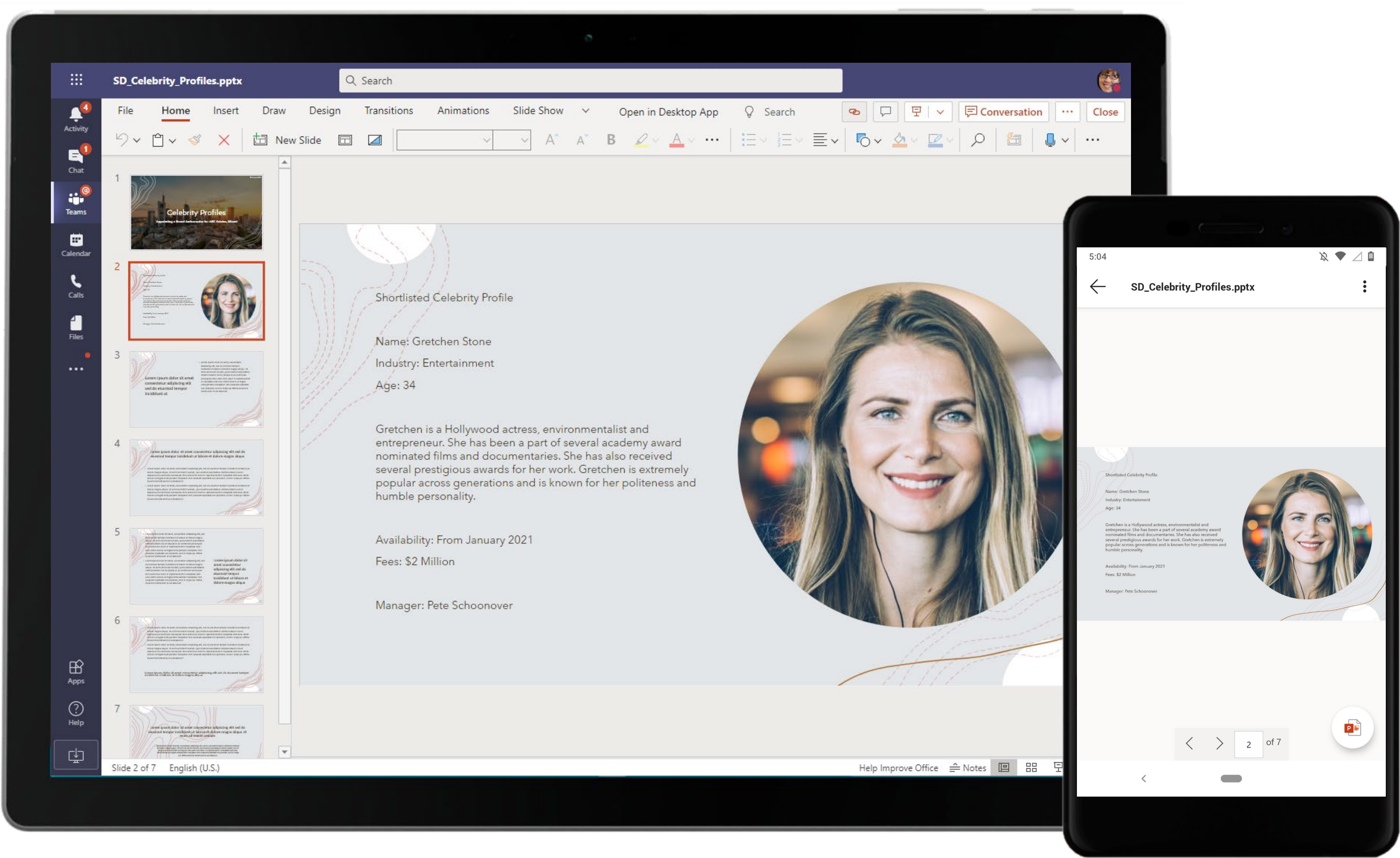
Enjoy powerful document creation and editing with the complete canvas and toolset of Word right inside Teams. Collaborate on team documents easily store them in Files for each channel.



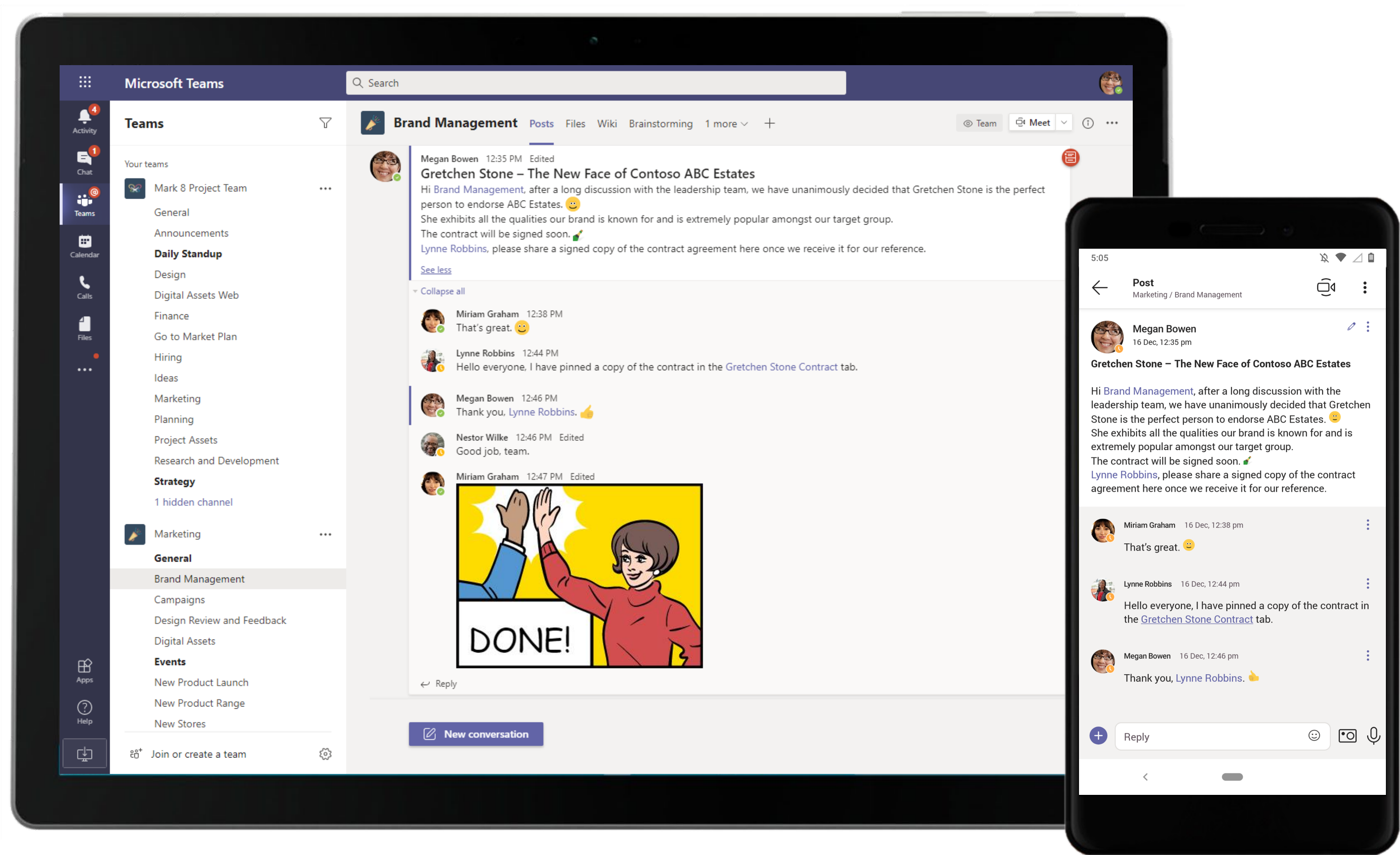
Collaborate, ideate and draft solutions on an infinite white boarding space with Freehand by InVision in Teams.



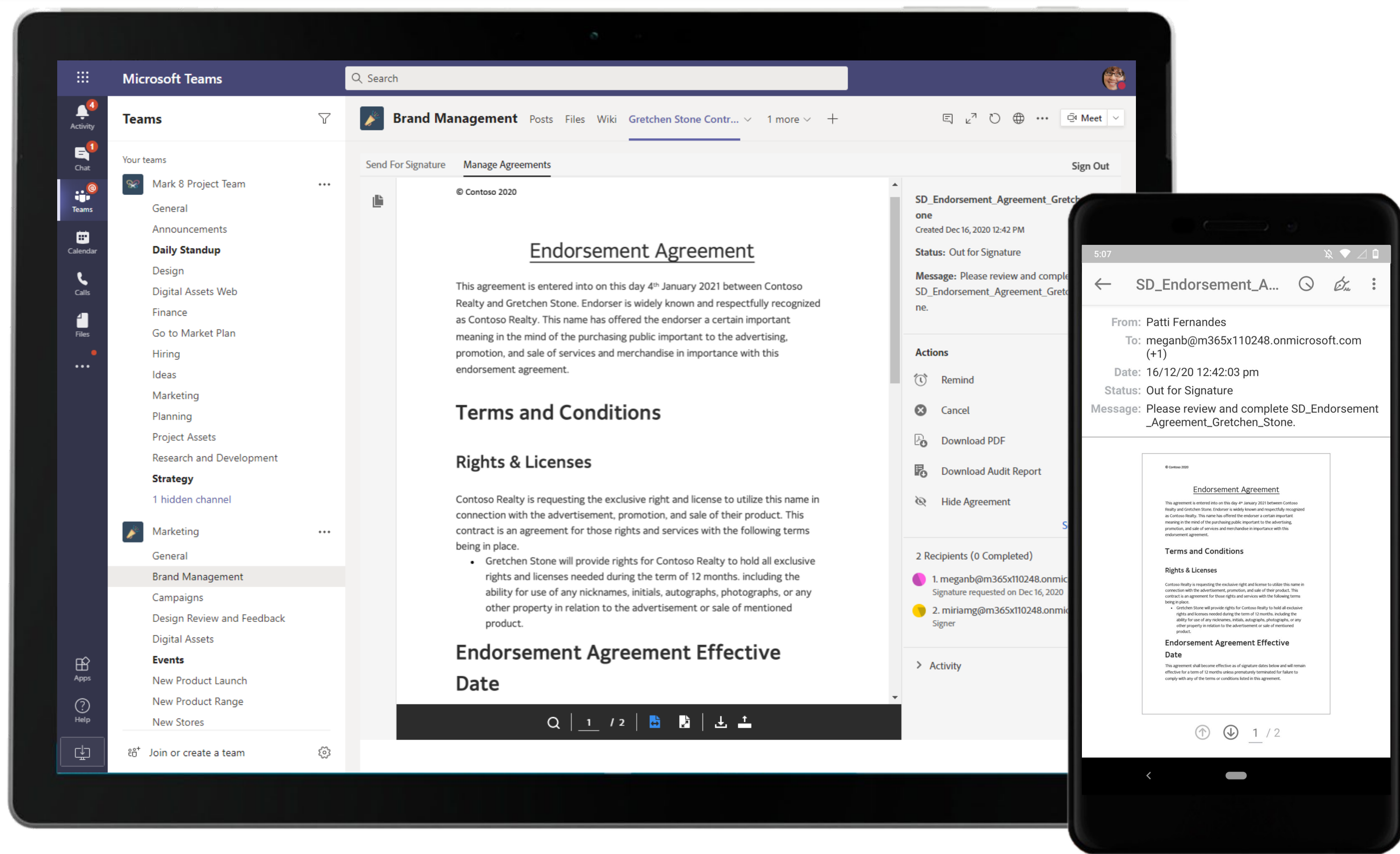
Channel conversations can contain a lot of things – conversations, files shared by team members, meeting threads, and GIFs! Use social features like reacting to team members' conversations and responses to acknowledge them.



PowerPoint helps draft and present an effective and easily consumable presentation for the team. The Marketing Manager views a PowerPoint presentation created by a team member.



@mention a person, channel or team to make sure your message reaches the relevant personnel. The announcement for the new face of the organization is made in the channel and relevant personnel are roped into the conversation using the @mention feature.



Sign and send documents, contracts, and digital forms for e-signature and approval directly from a tab in the Microsoft Teams with Adobe Sign.



# Monitoring Negative Response

## Marketing Analyst

### Scenario Walkthrough

The Marketing team at Contoso makes sure that they stay abreast of customers' comments on social media to get a sense of how the campaigns are performing in real-time and identify and resolve issues quickly. When customers tweet about issues with the coupon code and long lines, the Marketing Analyst quickly works with others across teams to resolve the issue and ensure that everything goes smoothly.

- Configures an automated flow to track social media activity via Power Automate.
- Responds to the Marketing Manager who asks the Marketing Analyst to look into the issues via channel communications.
- Reaches out to the Developer to discuss the issue in a 1:1 chat.
- Notifies the team of the resolution of the issue via channel communications.
- Configures a Power BI tab to track social media sentiment within a channel.
- Engages team members in a discussion on ways to avoid negative responses on social media via Ment.io

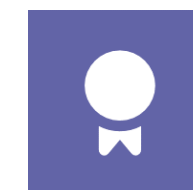
### How did Teams help the Marketing Analyst to execute his roles and responsibilities?

- Automate business workflows and track social media activity with Power Automate.
- Provide access to a transparent and inclusive discussion board with Ment.io
- Facilitation of data-driven decisions informed by visualizations and scoring in Power BI for Microsoft Teams.
- Show gratitude for peers who went above and beyond at work with Praise.

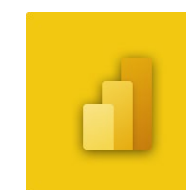
### Which app integrations on Teams made it possible?



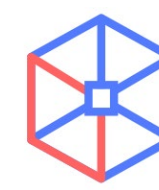
Power Automate



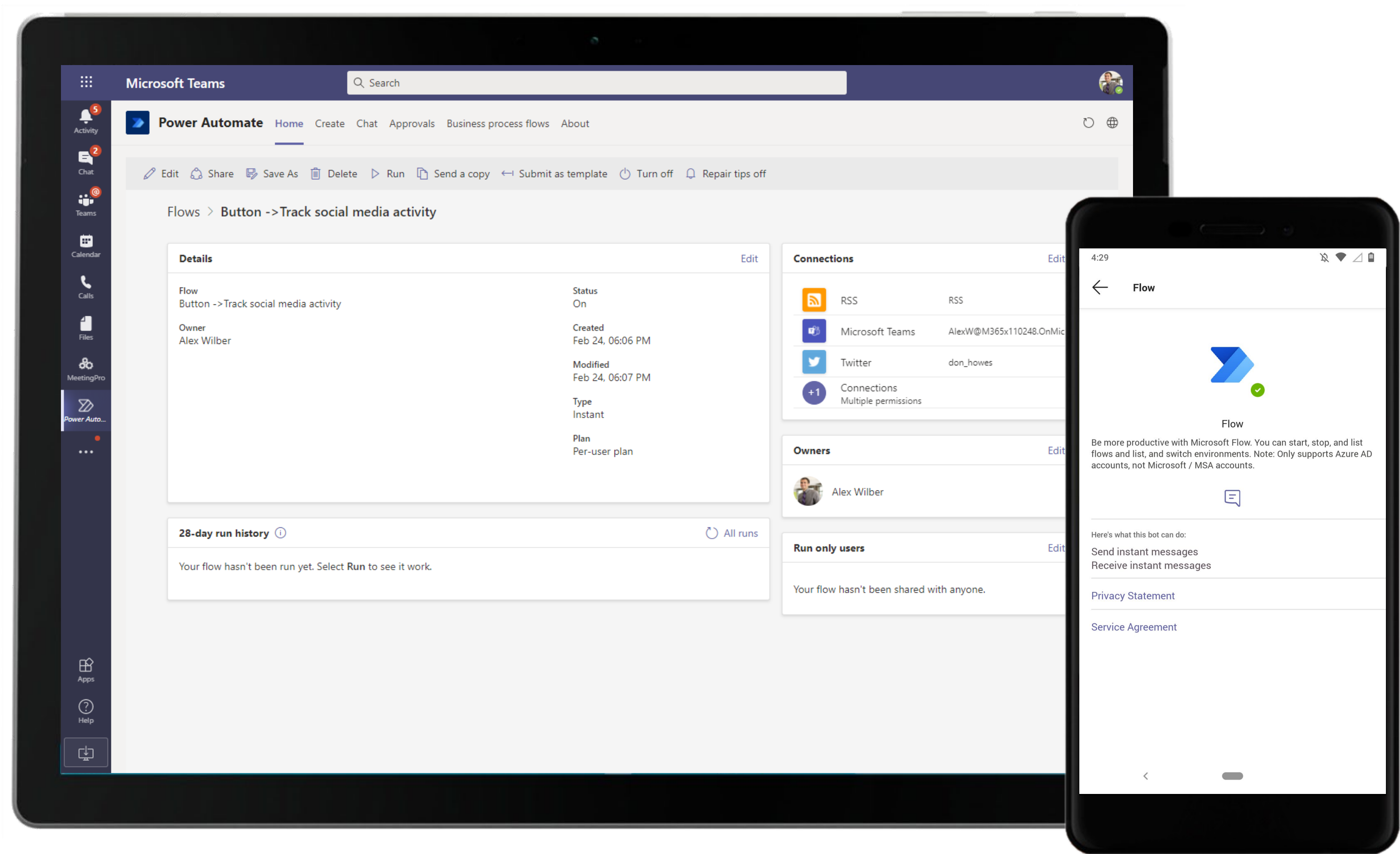
Praise



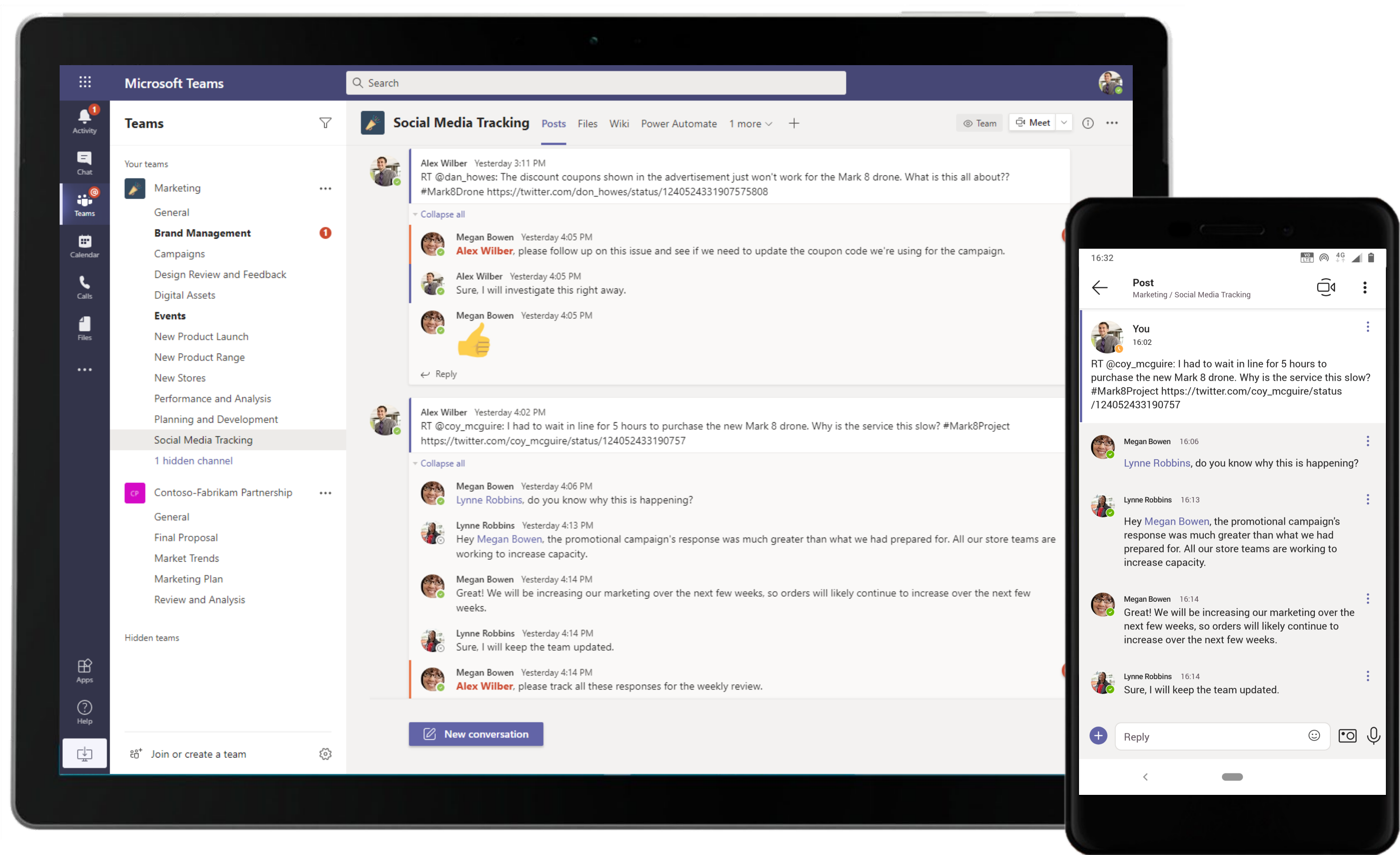
Power BI



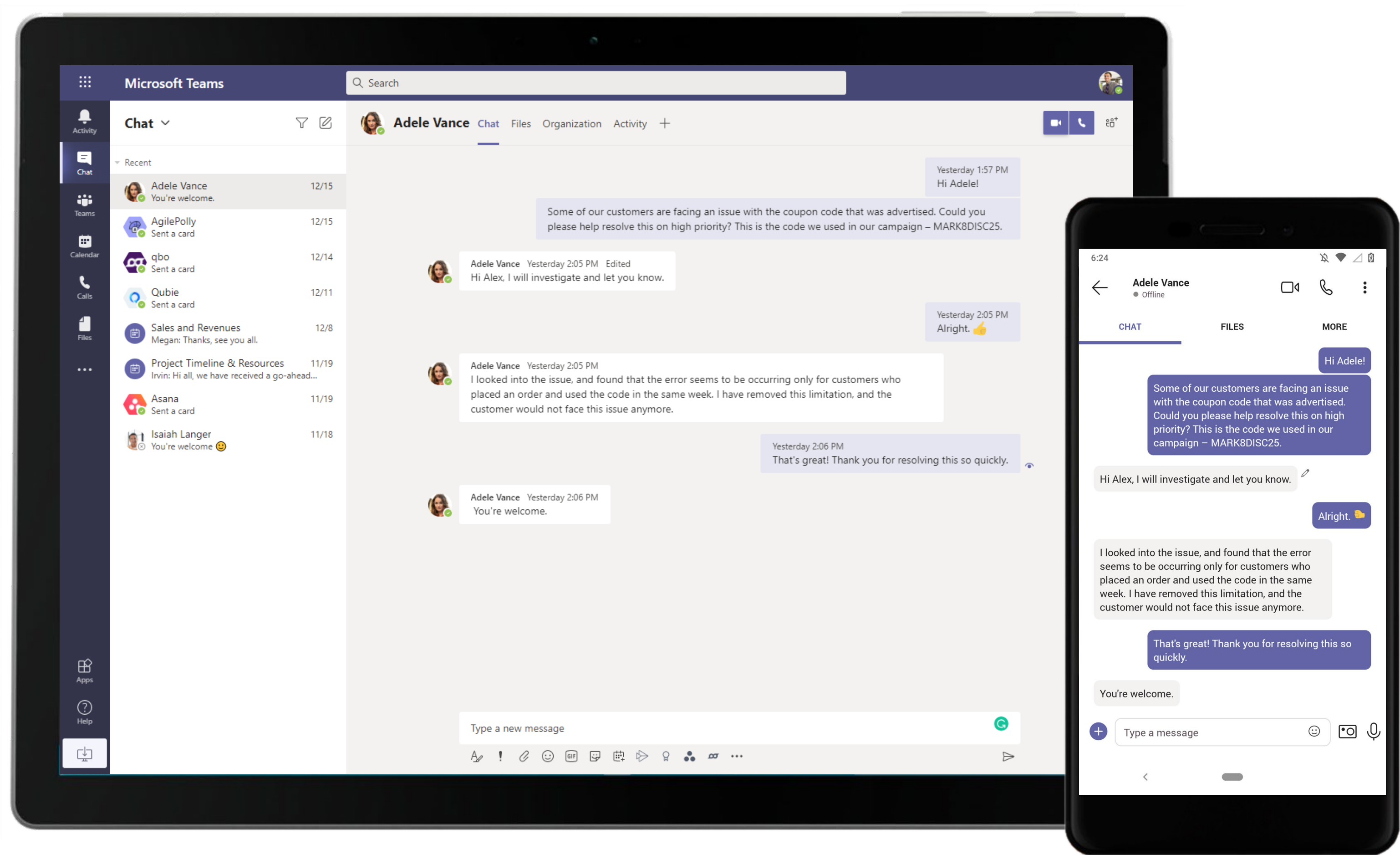
Ment.io



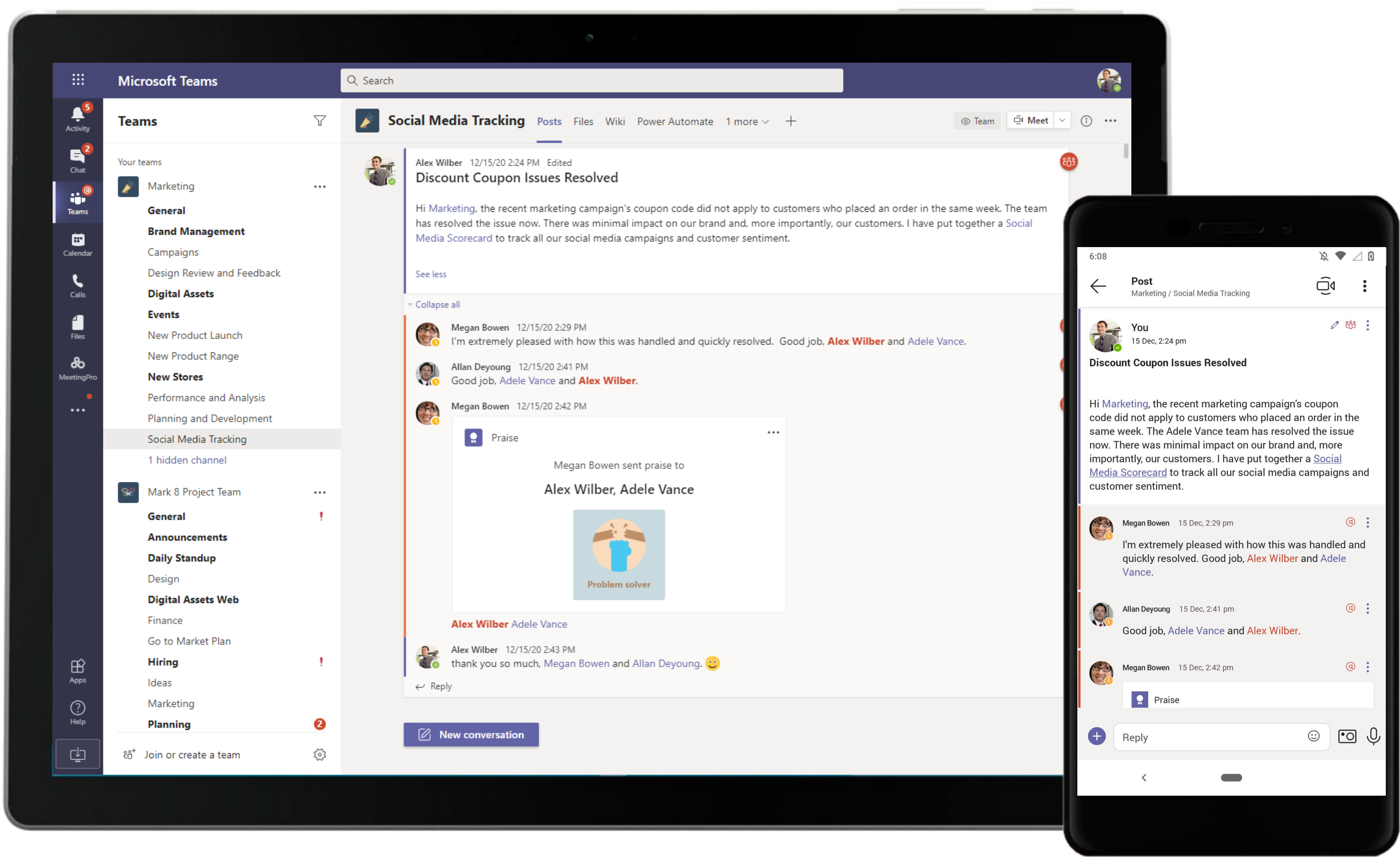
Automate routine workflows to simplify tasks using Power Automate. The Marketing Analyst creates a flow to track social media activity.



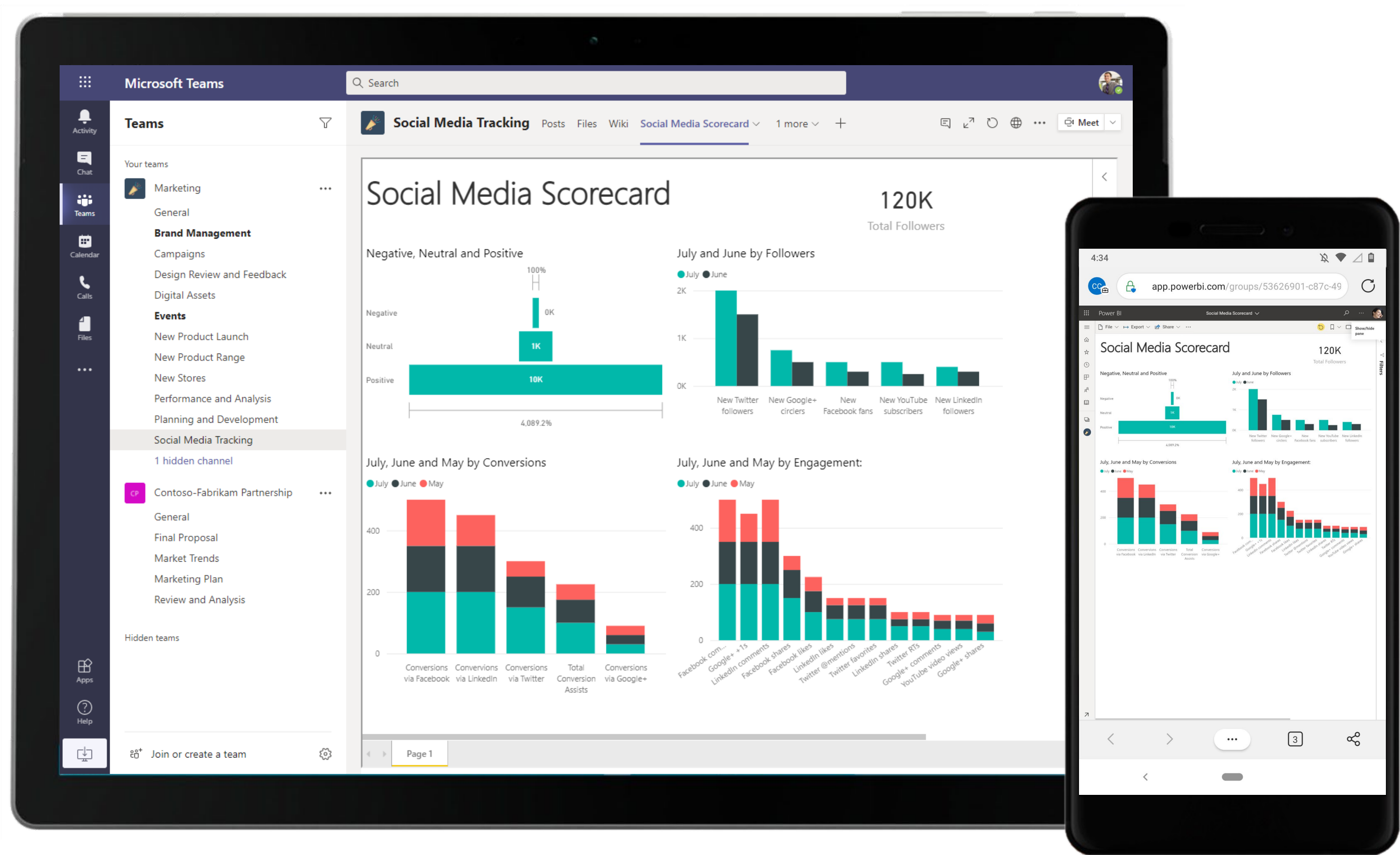
Microsoft Teams conversations are threaded so users can reply directly in-context to specific conversations, keeping relevant chats grouped together. @mention relevant team members to make sure you grab their attention in real-time.



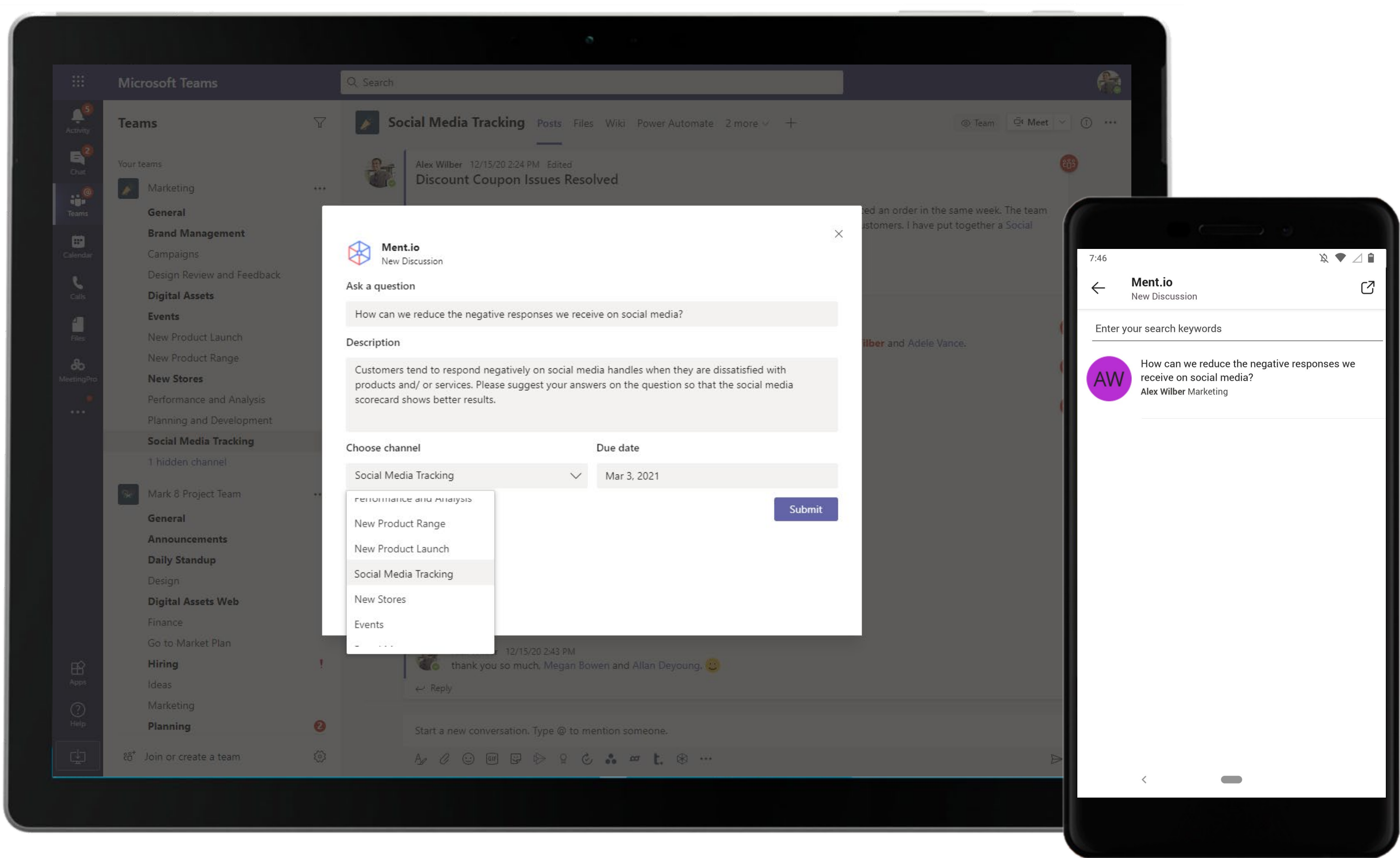
Use a private one-on-one chat or a group chat for conversations that don't require the entire team. The Marketing Manager quickly reaches out to the Marketing Analyst using 1:1 chat.



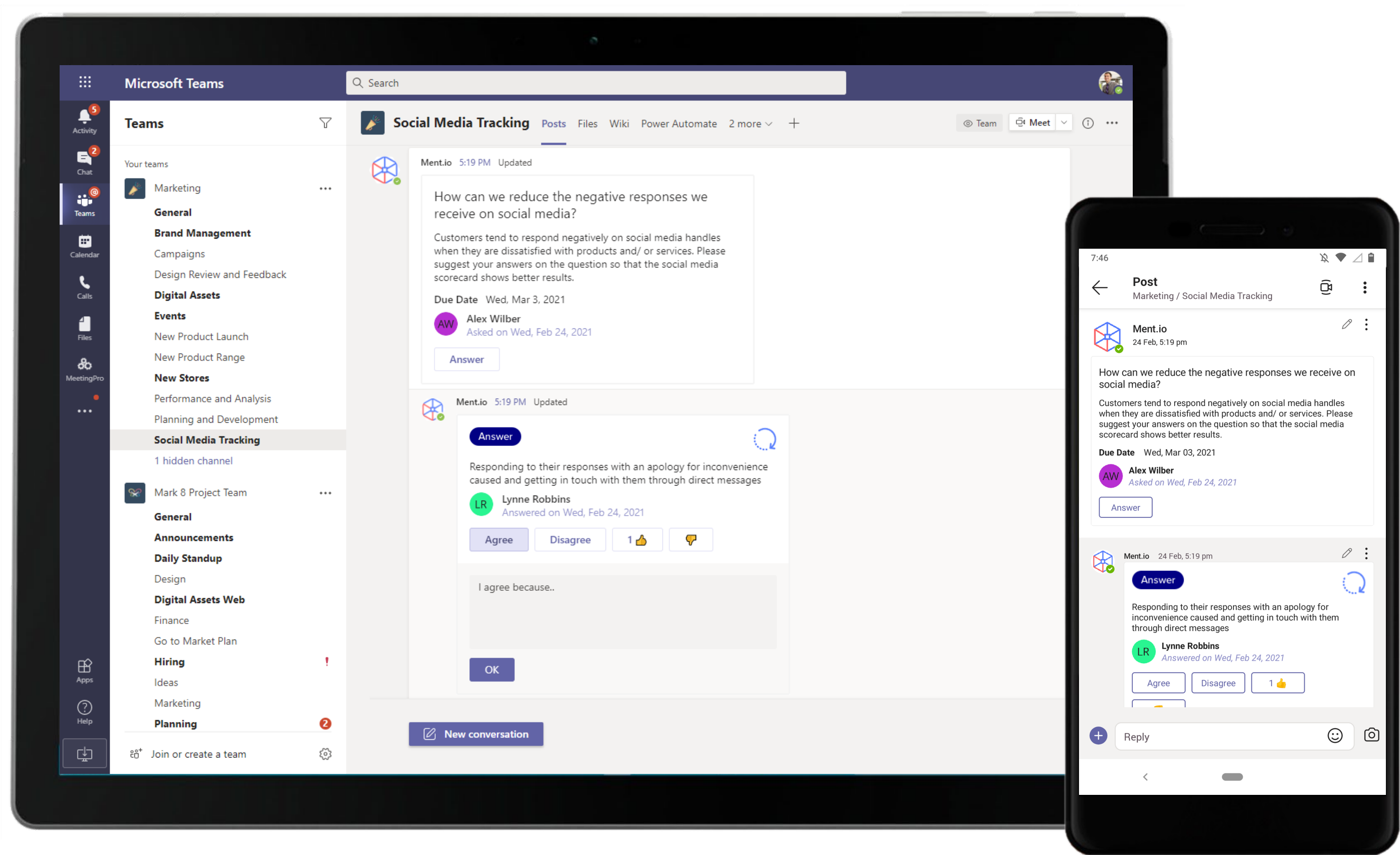
Send acclaim to your employees and coworkers with Praise. The Marketing Analyst gets praised by the leadership for quick resolution of the issue.



A Power BI dashboard offers a visually rich view of current and projected data. The Marketing Analyst uses Power BI to breakdown the social media scorecard driven by visualizations and scoring in Power BI for Microsoft Teams.



The Ment.io app allows you to engage your team fostering credible collaborative thinking. The Marketing Analyst asks team members for suggestions on reducing the negative responses.



Ment.io in Teams allows you to collaborate with your team regarding strategic questions with polls and discussions. The Marketing Analyst utilizes Ment.io to discuss ways to reduce the negative responses received on social media.



# Devising a Digital Marketing Plan for Brand Building

## Marketing Manager

### Scenario Walkthrough

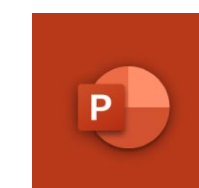
Contoso is planning to strengthen its brand presence and devise a digital marketing plan to promote Contoso's brand image online. The Marketing Manager leverages applications to brainstorm ideas, track tasks and seamlessly collaborate with team members to carve out an effective digital media strategy.

- Reviews online marketing trends shared by the Brand Strategist using a OneNote tab.
- Schedules a meeting and uses Lucidchart to brainstorm ideas on the plan.
- Sets deadlines, creates tasks and assigns responsibilities using Asana.
- Uses virtual breakout rooms during the meeting to make it easier for participants to collaborate and discuss ideas.
- Presents the plan to team members with a PowerPoint deck to finalize their digital strategy.

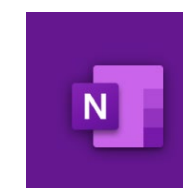
### How did Teams help the Marketing Manager execute her roles and responsibilities?

- OneNote allows team members to have shared access to important facts and information.
- Collaborate on ideas in real-time using Lucidchart.
- Create, assign and track tasks across multiple projects within a meeting with Asana.
- PowerPoint helps draft and present an effective and easily consumable presentation for the team.

### Which app integrations on Teams made it possible?



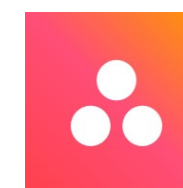
PowerPoint



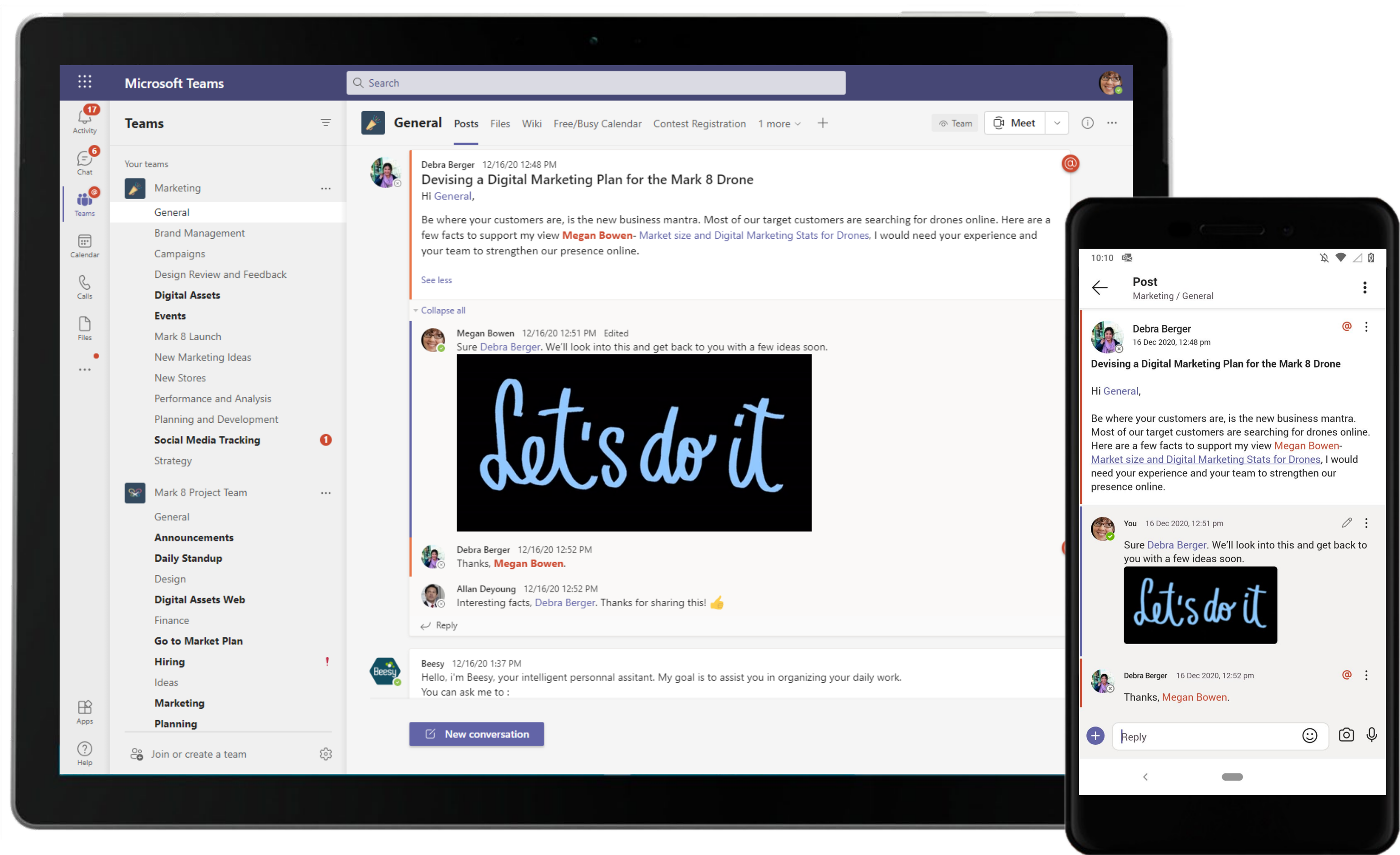
OneNote



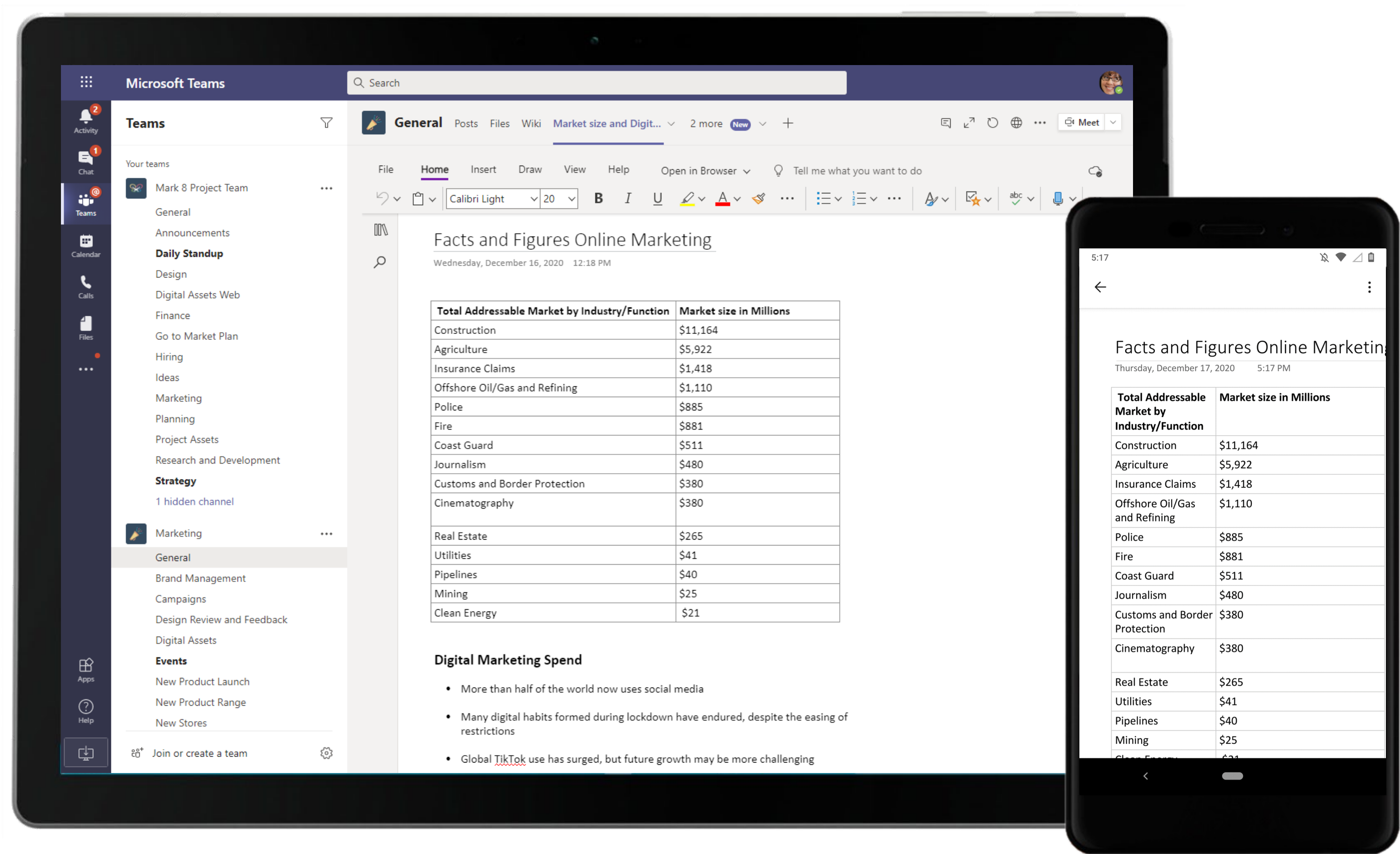
Lucidchart



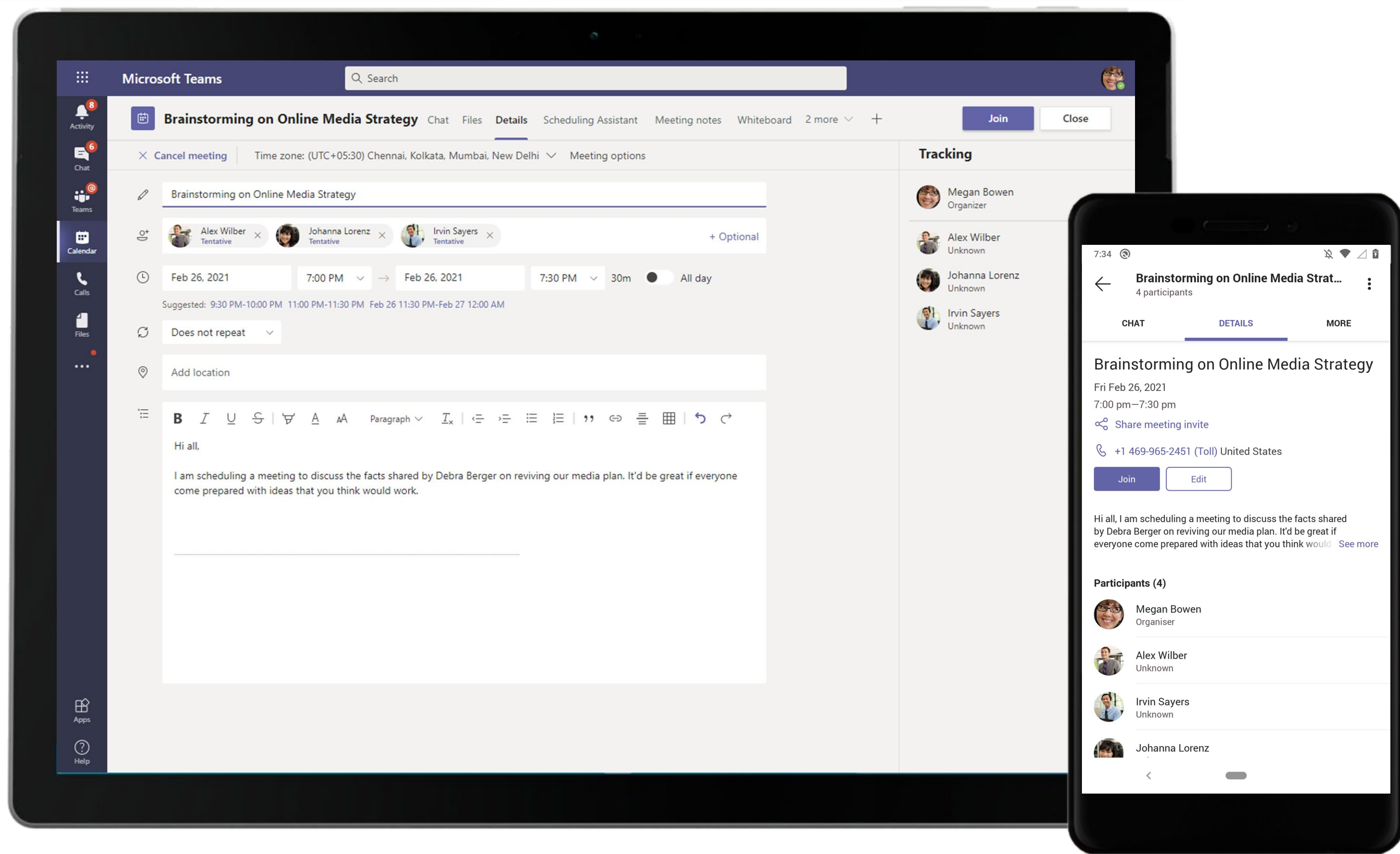
Asana



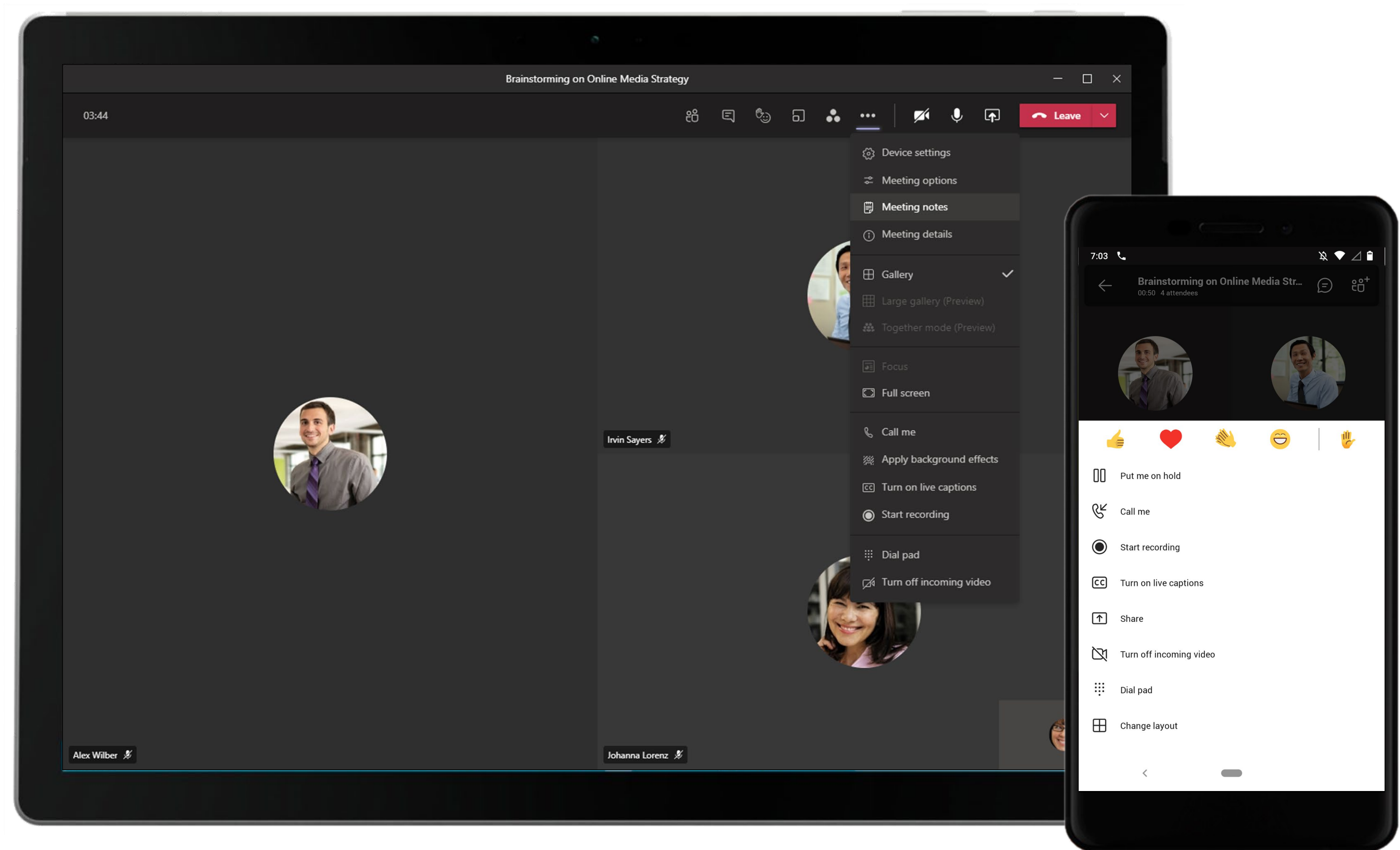
Microsoft Teams enables transparent communications through channel conversations. The Marketing Manager communicates in open-channel conversations and keeps team members up-to-date.



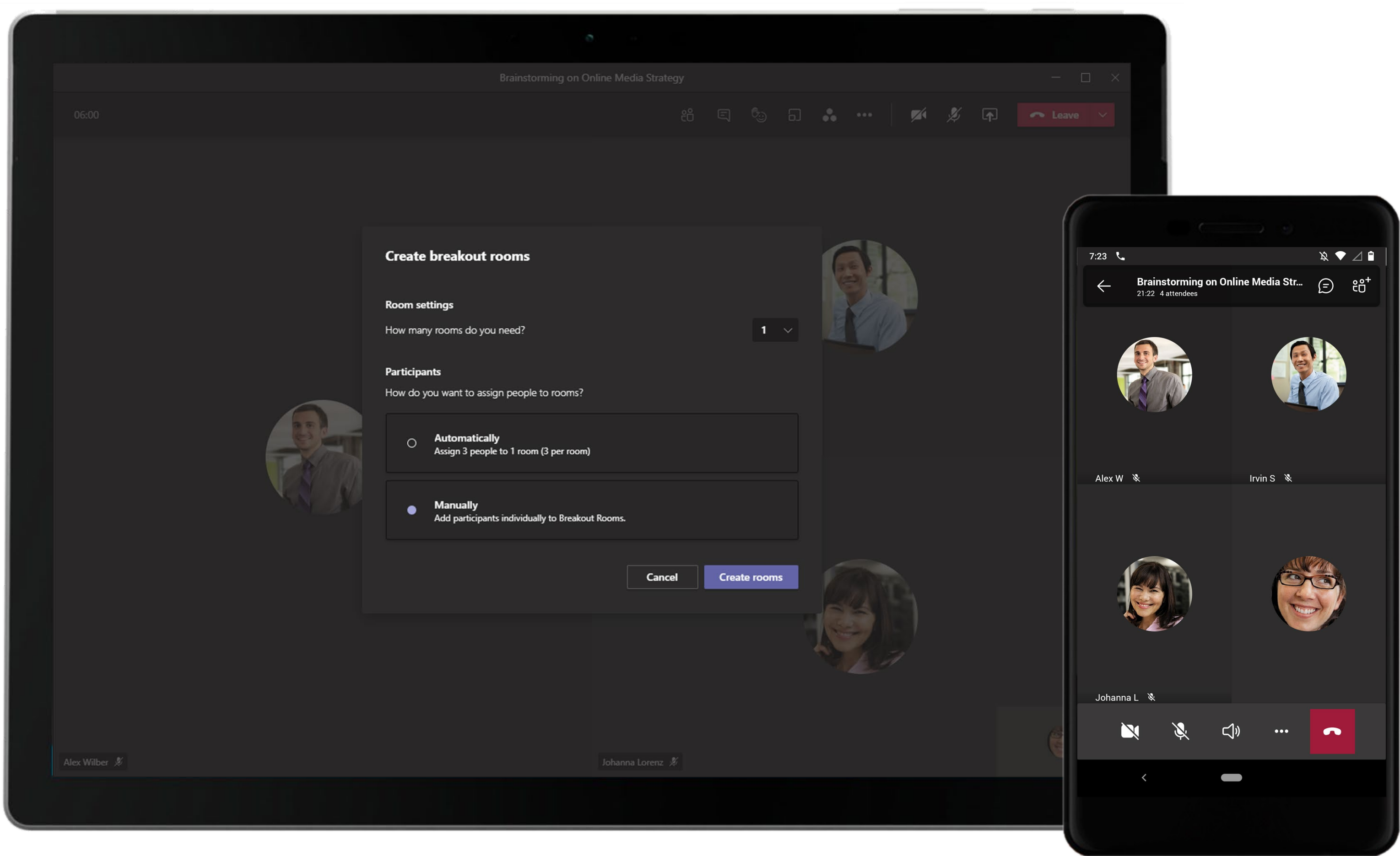
Collaborative and powerful document creation with OneNote in Microsoft Teams. Quickly disseminate meeting outcome, notes and action items among team members with OneNote tabs that can be pinned to any channel.



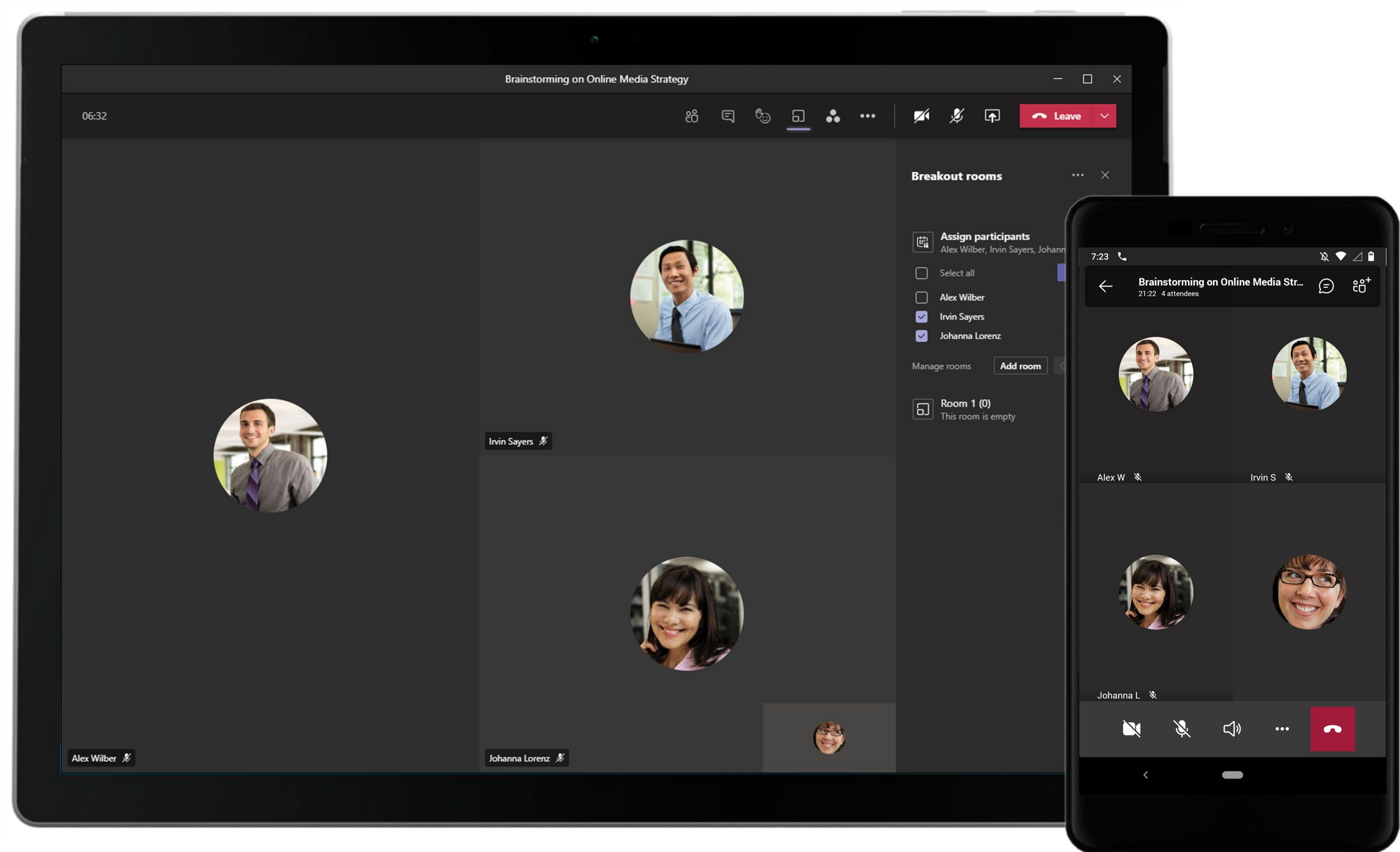
Meet with team members anywhere, anytime. When scheduling meetings, the Marketing Manager uses the native scheduling calendar in Teams to find the best available time slots for meeting invitees.



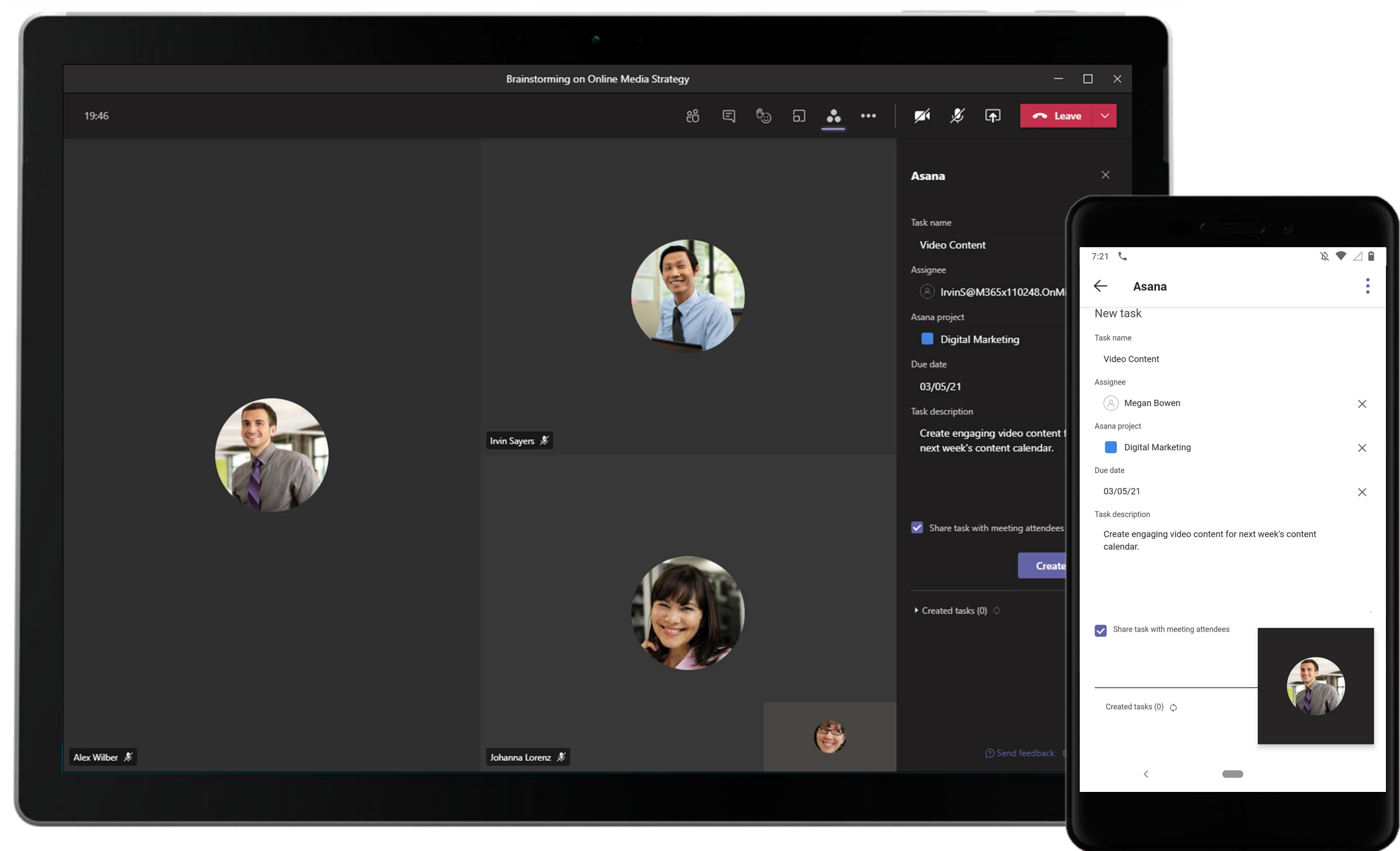
Meeting attendees can leverage a wide range of features like live captions, background effects, meeting recordings and more for an engaging and productive meeting experience.



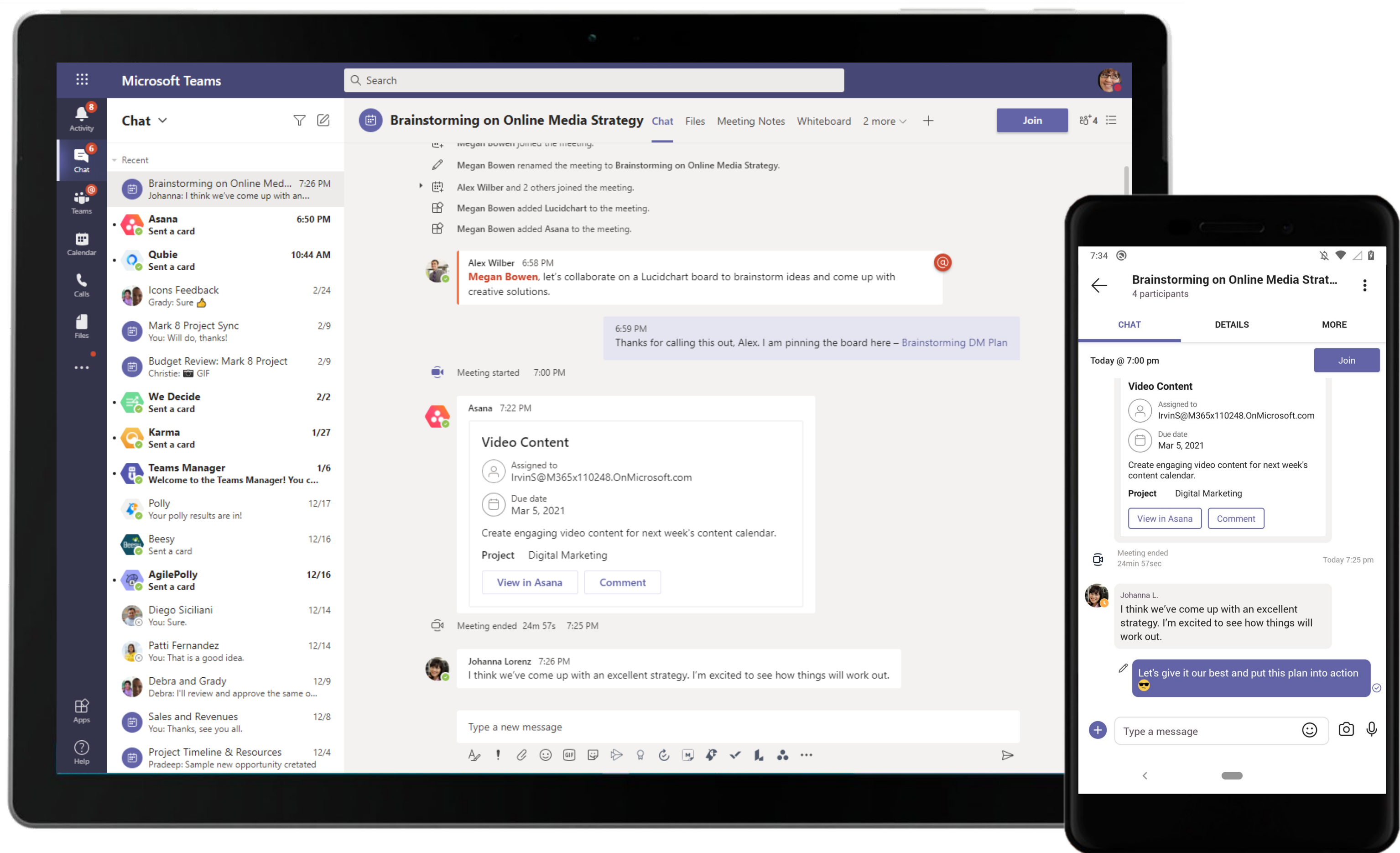
Organizers can choose to assign participants to breakout rooms manually or automatically to engage participants in discussions during a meeting.



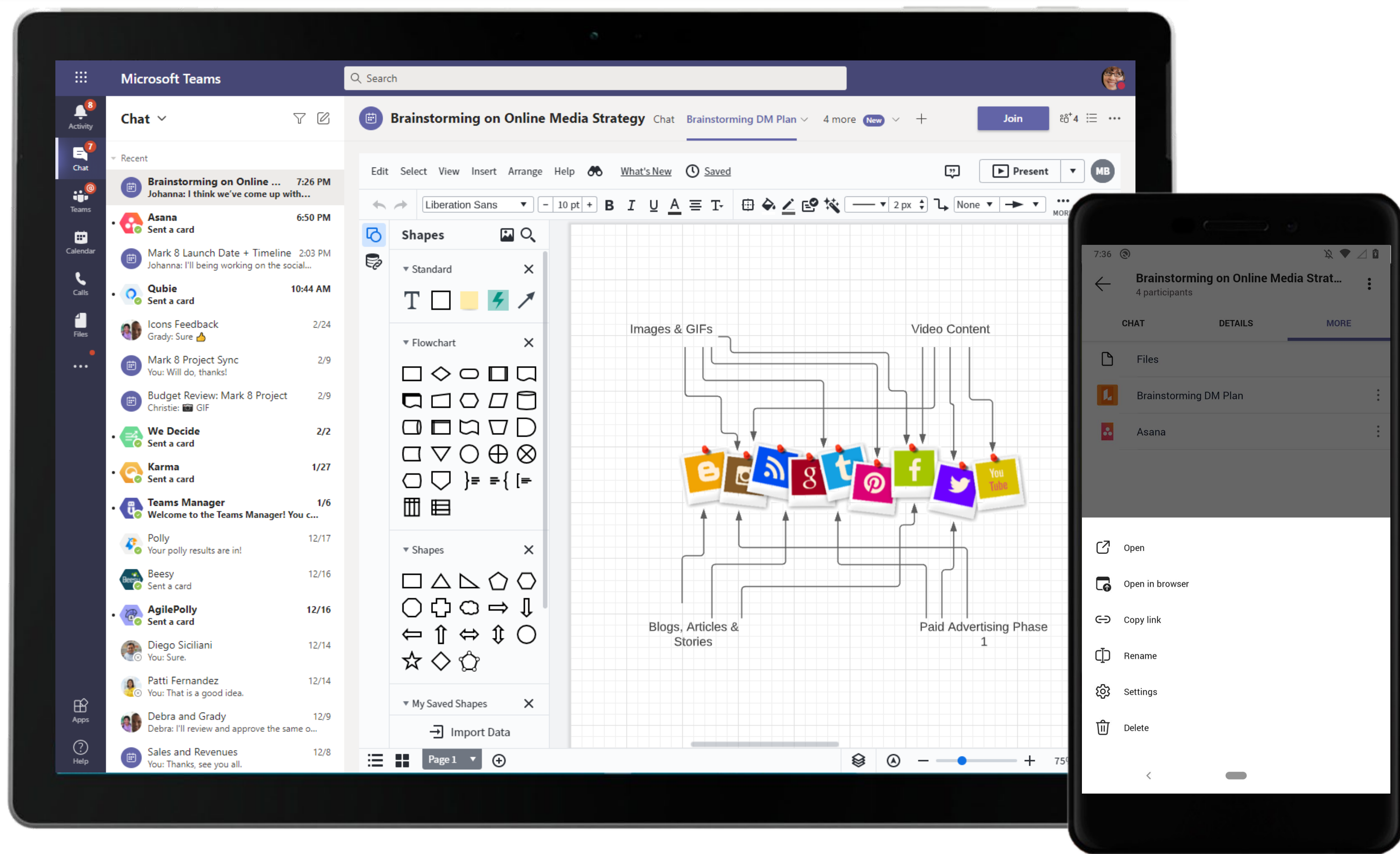
Breakout rooms allow meeting organizers to divide the meeting into sub-groups to facilitate discussions and brainstorming sessions. This allows for greater flexibility during meetings and participants can clarify questions without disturbing the breakout rooms sessions.



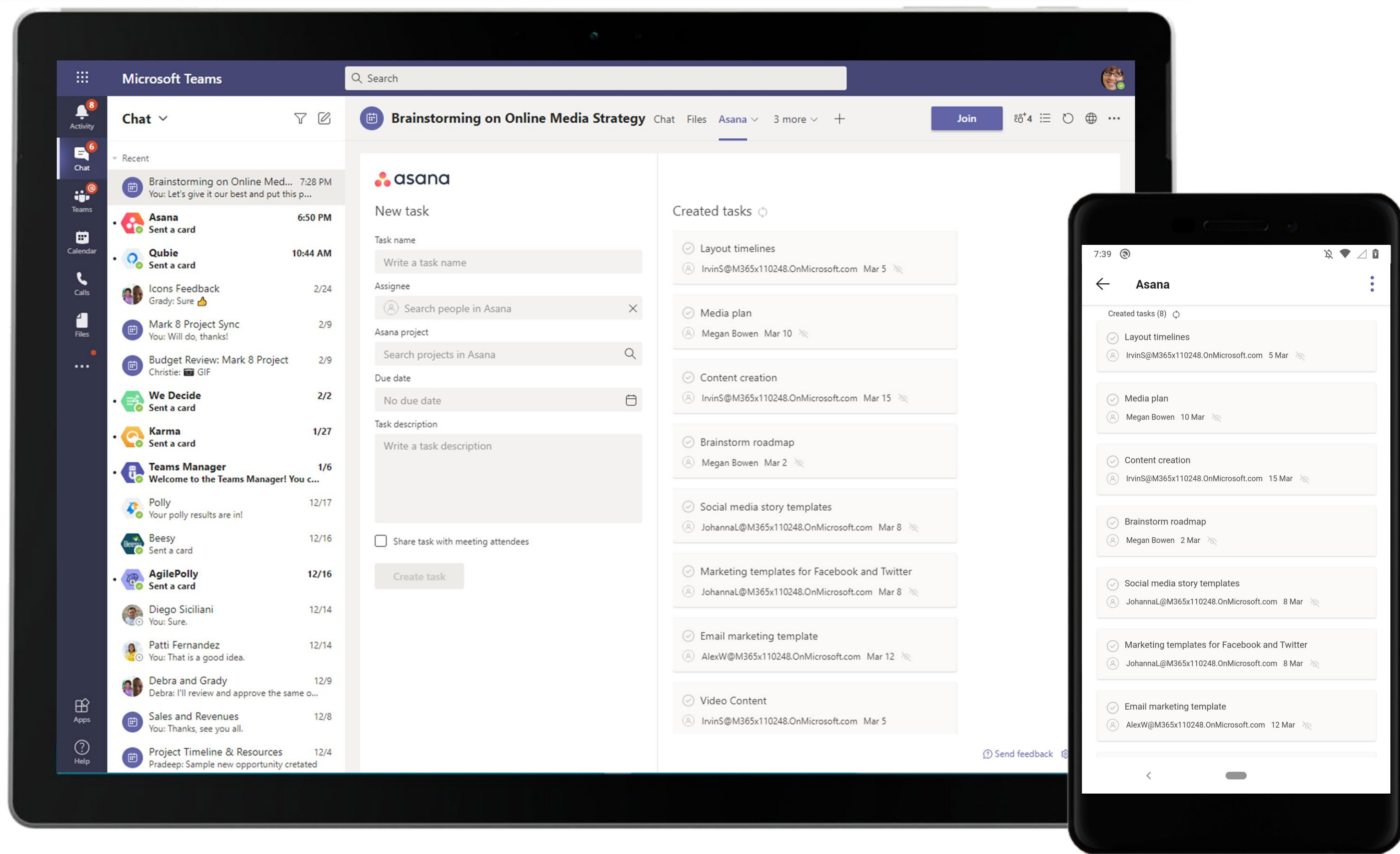
Asana in meetings allows participants to create and assign tasks to participants without leaving the meeting interface. The Marketing Manager assigns tasks during the call.



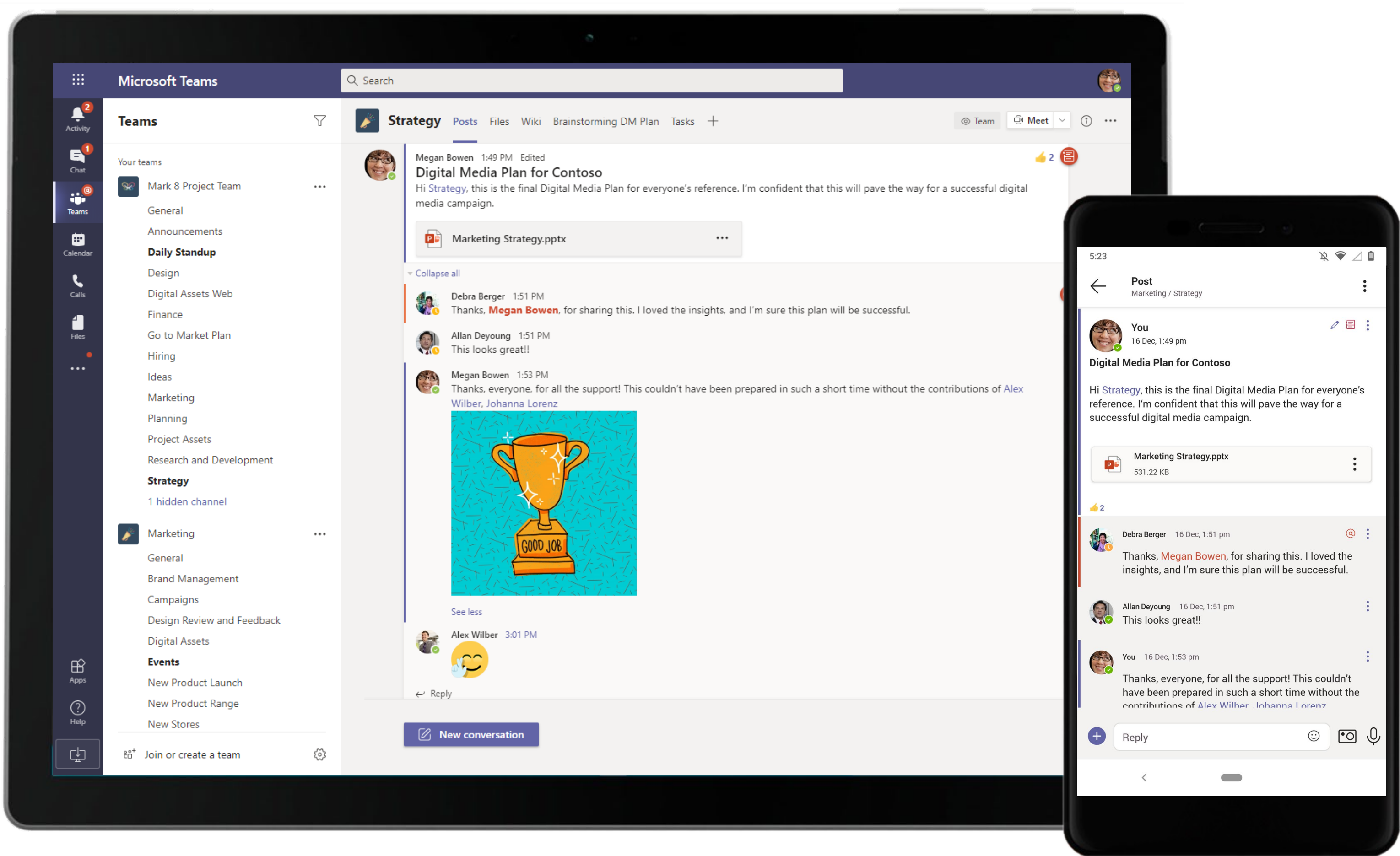
Share important information, updates, files, tasks and more within a meeting chat for a collaborative meeting experience.



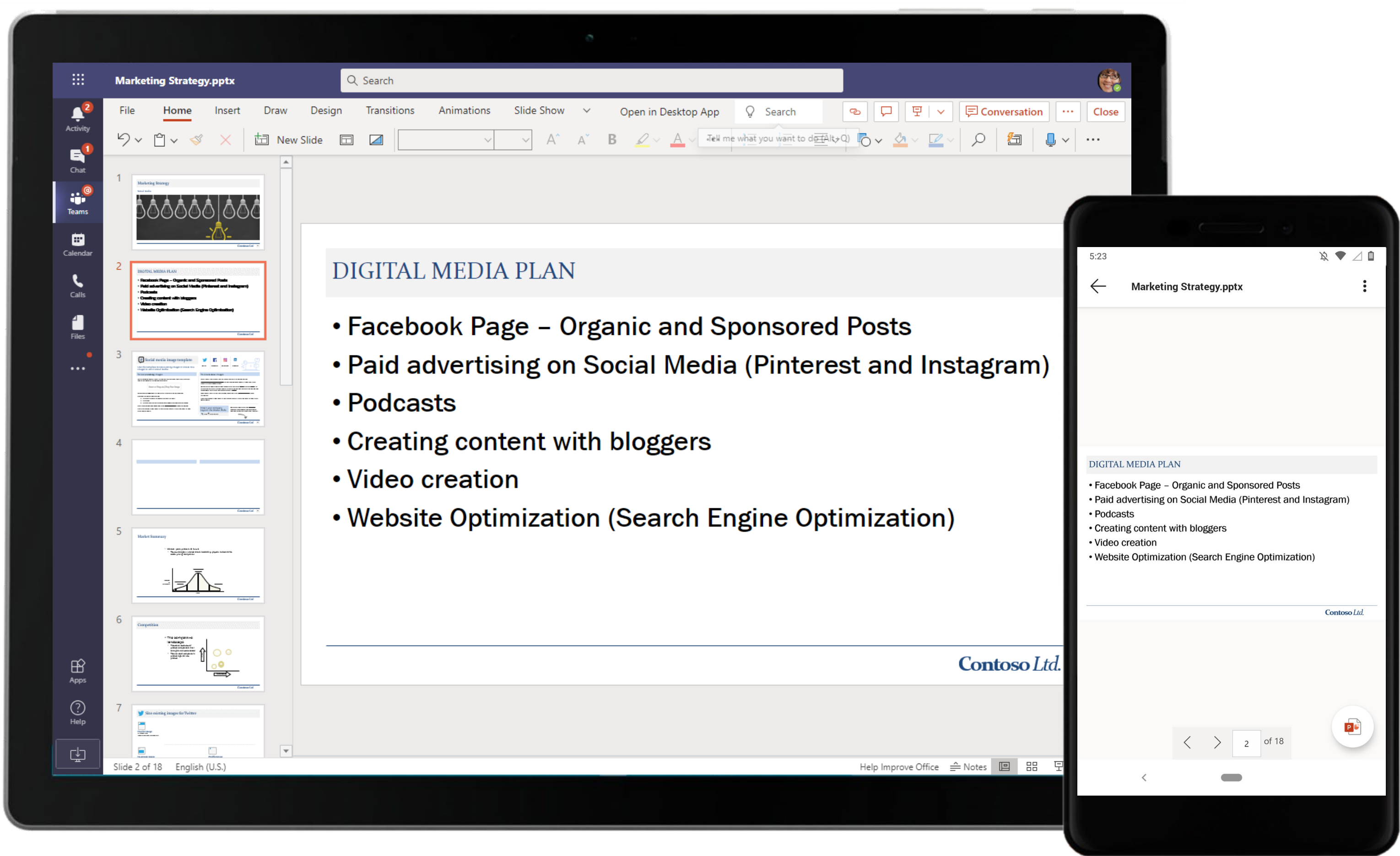
Add Lucidchart as a tab and collaborate on diagrams directly in Microsoft Teams. The Marketing team brainstorms online media strategies during the meeting on Lucidchart.



Meeting participants can view tasks created during the meeting with Asana right within a meeting tab for quick and easy reference. Tasks can be added before, during and after a meeting.



Close out conversations in channels once your project objectives have been achieved. The files shared during the discussions will stay hosted within the Files tab in the channel.



PowerPoint helps draft and present an effective and easily consumable presentation for the team. The Marketing Manager shares the digital media plan in a PowerPoint format.



# Plan and Carry Out a Successful Product Launch

## Social Media Manager

### Scenario Walkthrough

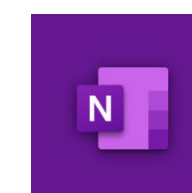
COVID-19 has forced many companies, including Contoso, to rethink their sales approach and reach out to their customers. Contoso has a product to launch, but product launches require a lot of time, planning, and collaboration. It can be challenging to coordinate ideas across teams and to ensure plans are met on time. The Social Media Manager leverages advanced features and applications on Teams to complete her tasks.

- Participates in a meeting to discuss ideas for the Mark 8 product Launch.
- Turns on live captions during the meeting and assigns tasks regarding the design for launch poster via monday.com
- Views the timeline for the launch over OneNote.
- Reviews the designs for the poster shared via Adobe Creative Cloud.
- Engages the team with a quick poll to decide the final poster via SurveyMonkey.
- Configures a YouTube channel tab to enable the team to seamlessly stream the event.

### How did Microsoft Teams help the Social Media Manager execute her roles and responsibilities?

- Enable document collaboration and information sharing using OneNote.
- Create polls to get quick feedback with SurveyMonkey.
- Seamlessly search and share relevant videos with YouTube.
- Find, view, and share Adobe Creative Cloud assets within Microsoft Teams.

### Which app integrations on Teams made it possible?



OneNote



YouTube



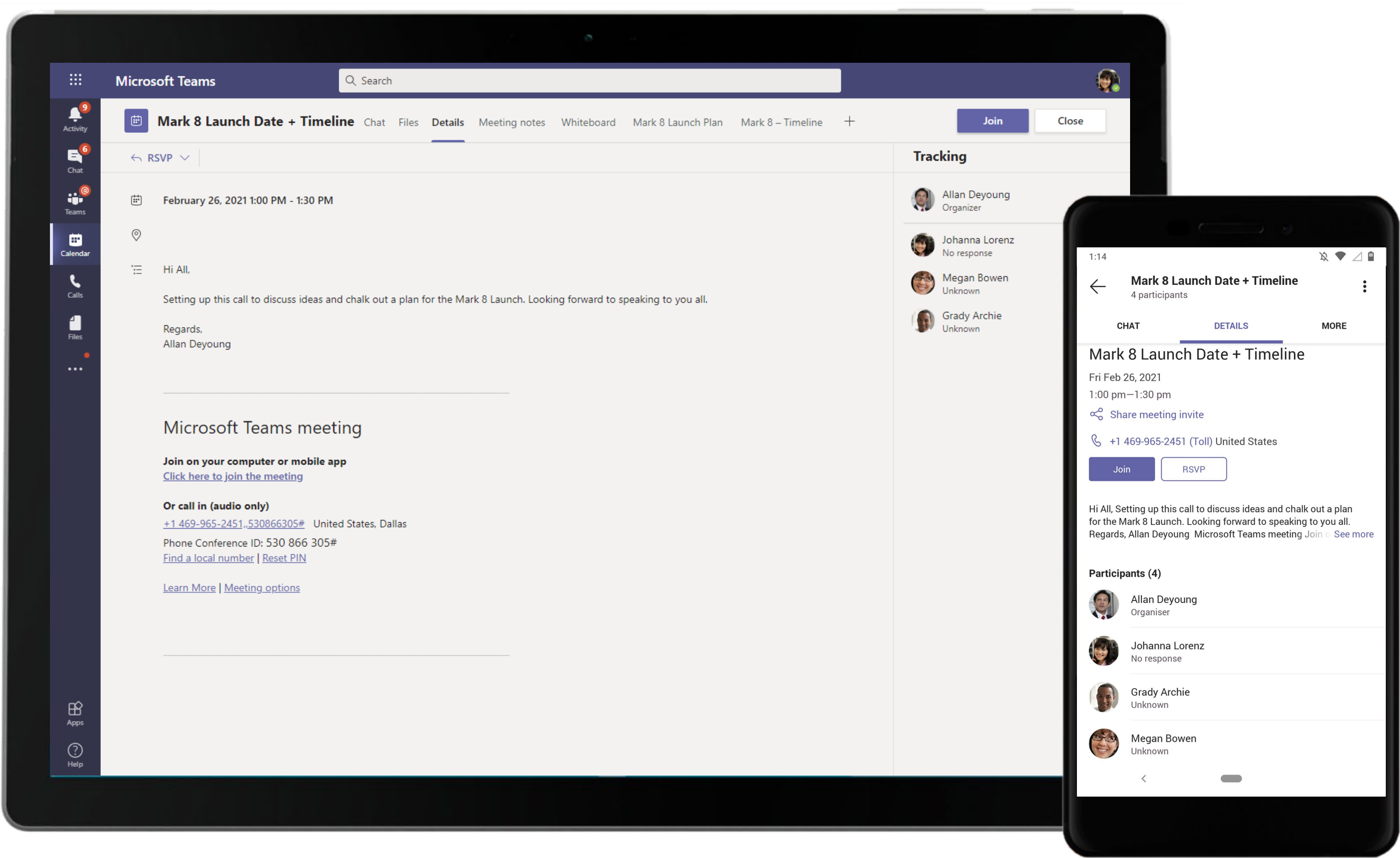
monday.com



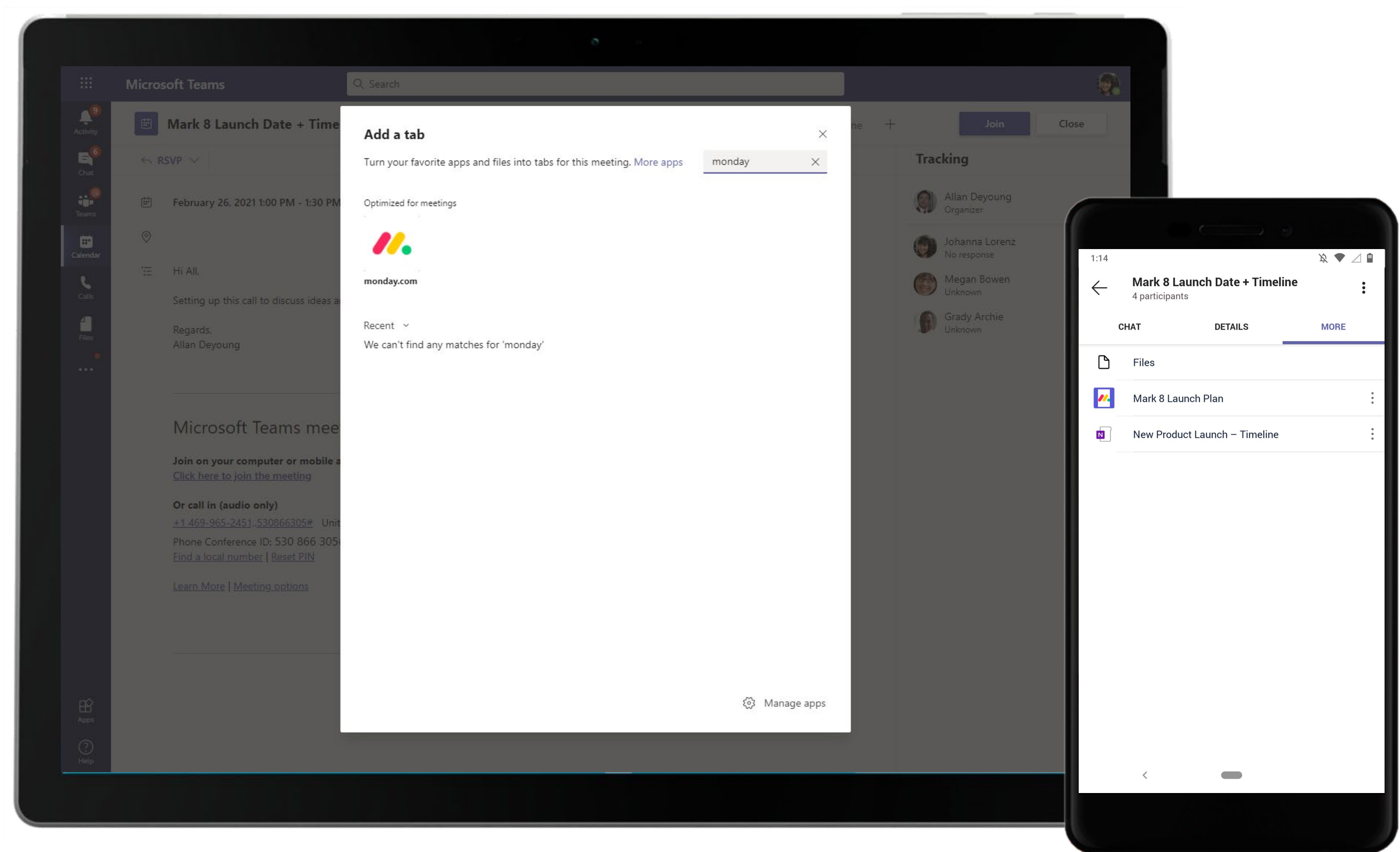
Adobe Creative  
Cloud



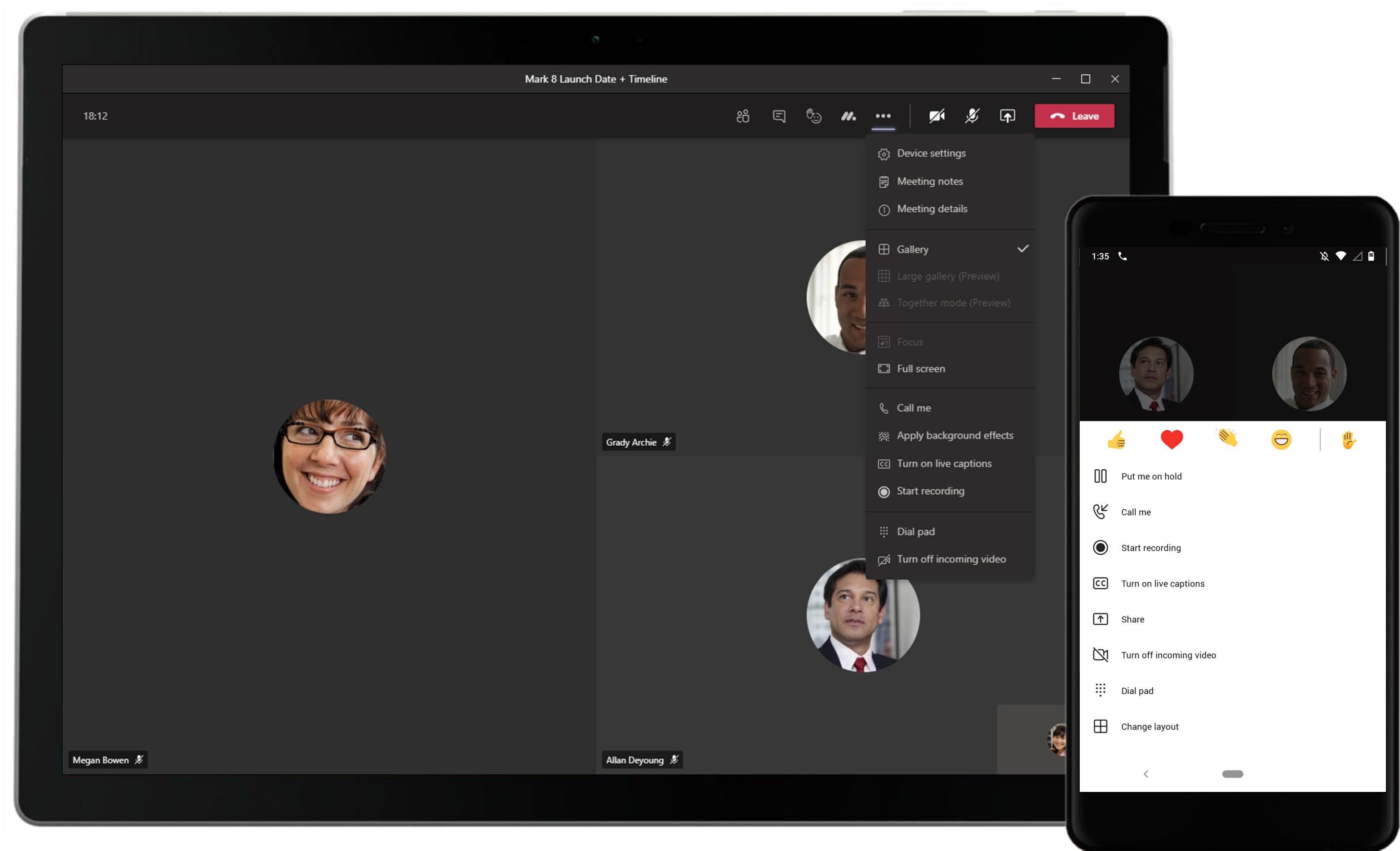
SurveyMonkey



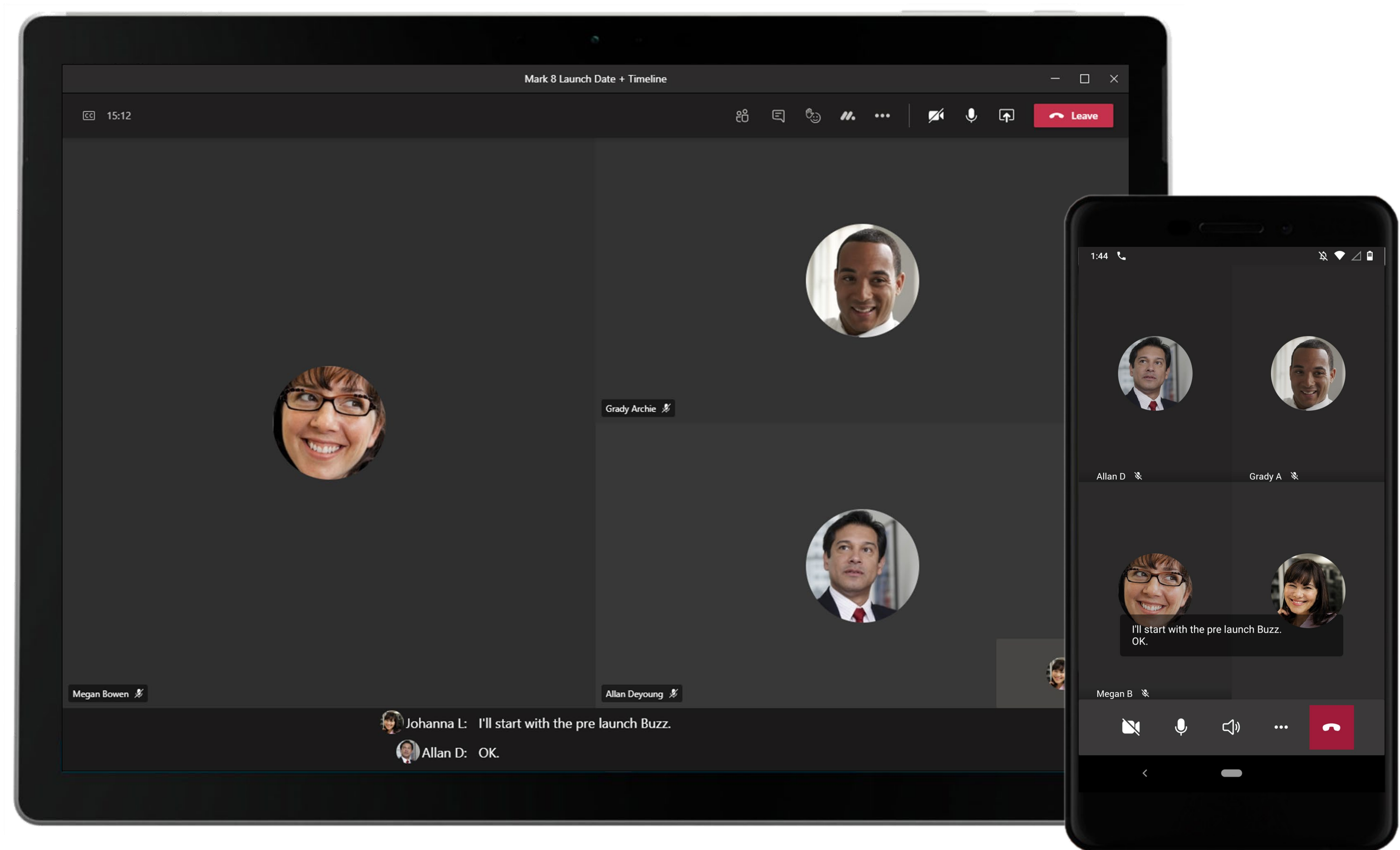
Complete meeting solutions in Teams support screen sharing, recording, video and audio conferencing. Participants can view meeting details, configure new applications and keep track of meeting attendees.



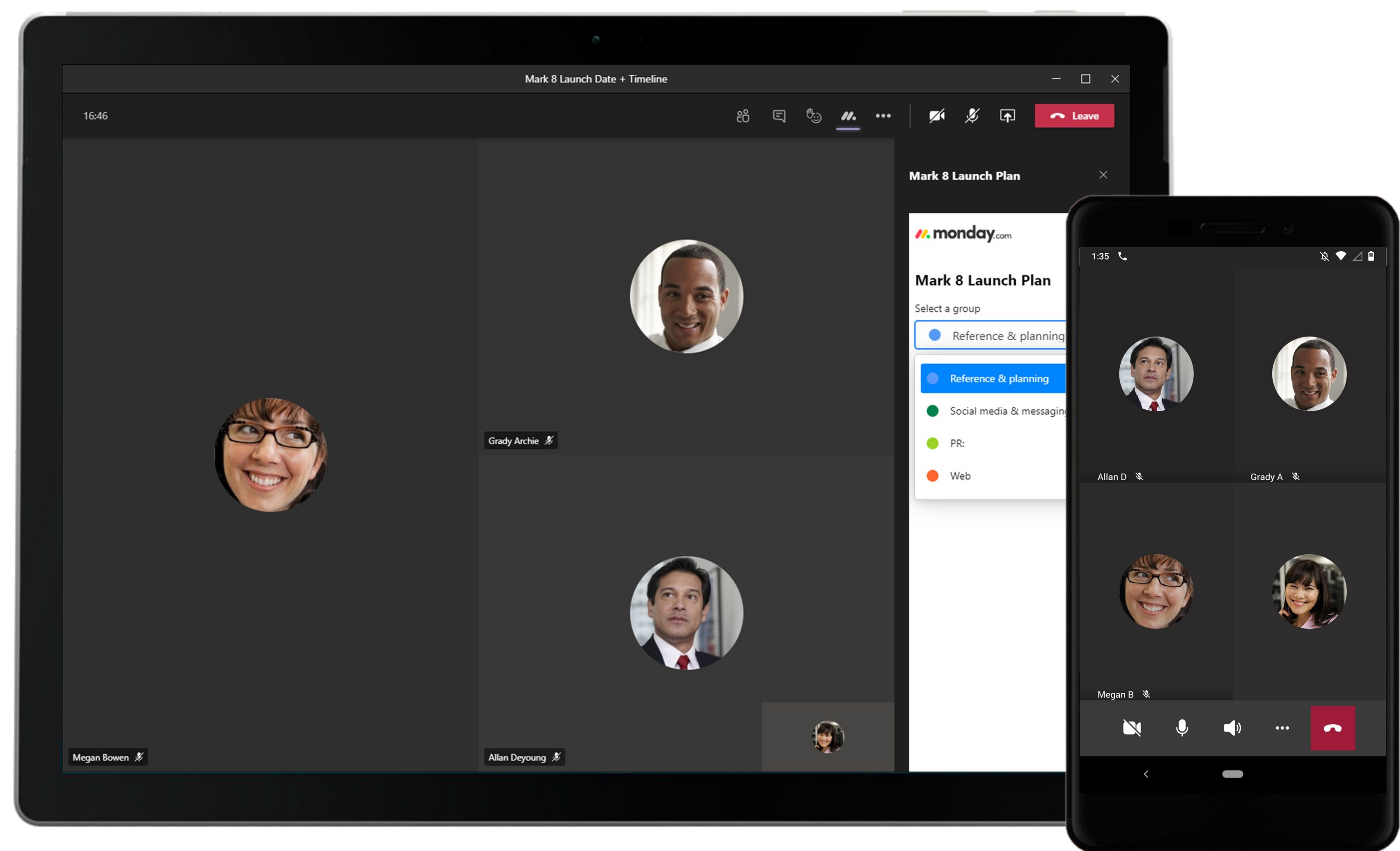
Configure relevant apps for your meeting in a tab to access information necessary during the meeting.



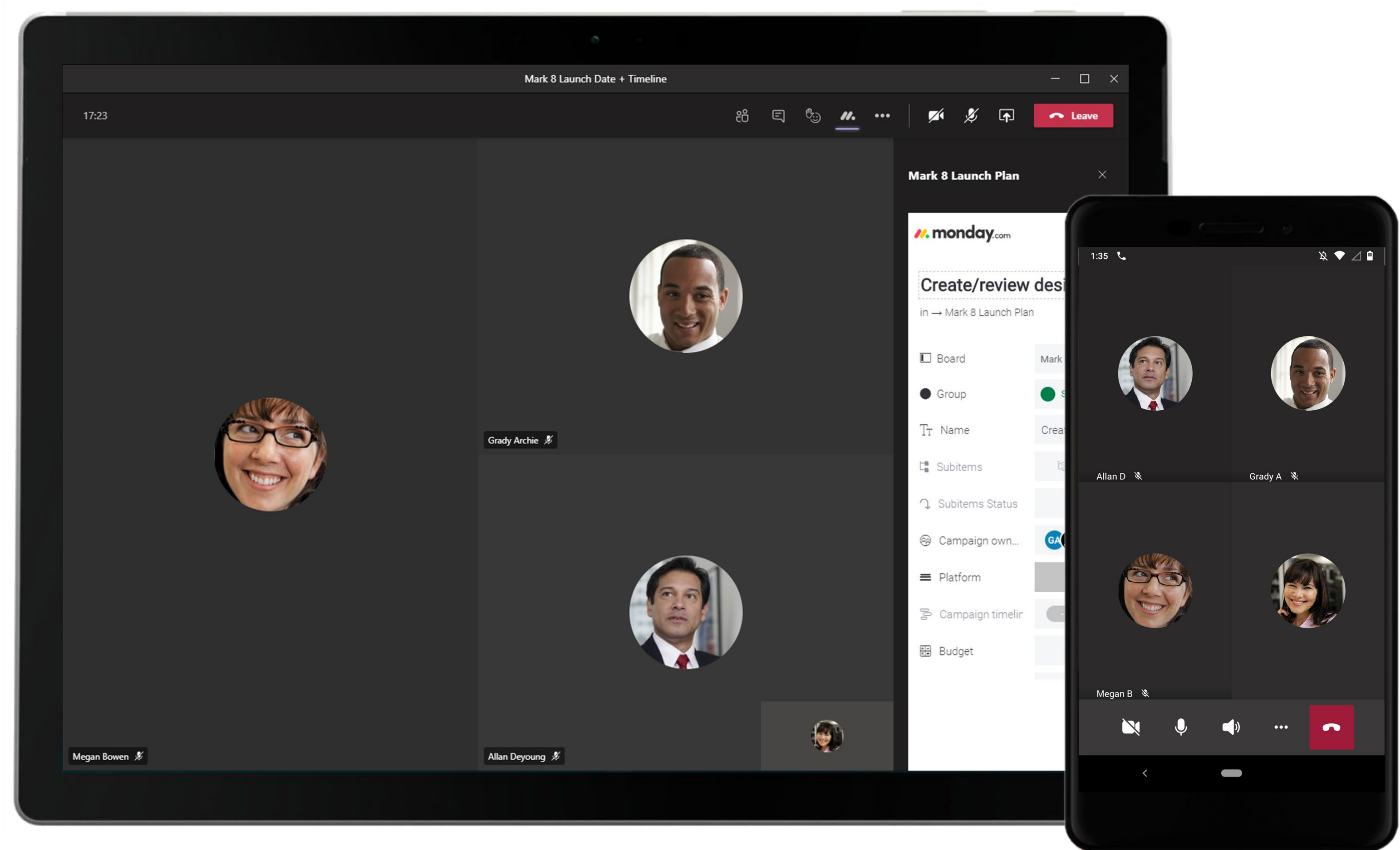
Meeting attendees can leverage a wide range of features like live captions, background effects, meeting recordings and more for an engaging and productive meeting experience. The Social Media Manager turns on live captions and records the meeting.



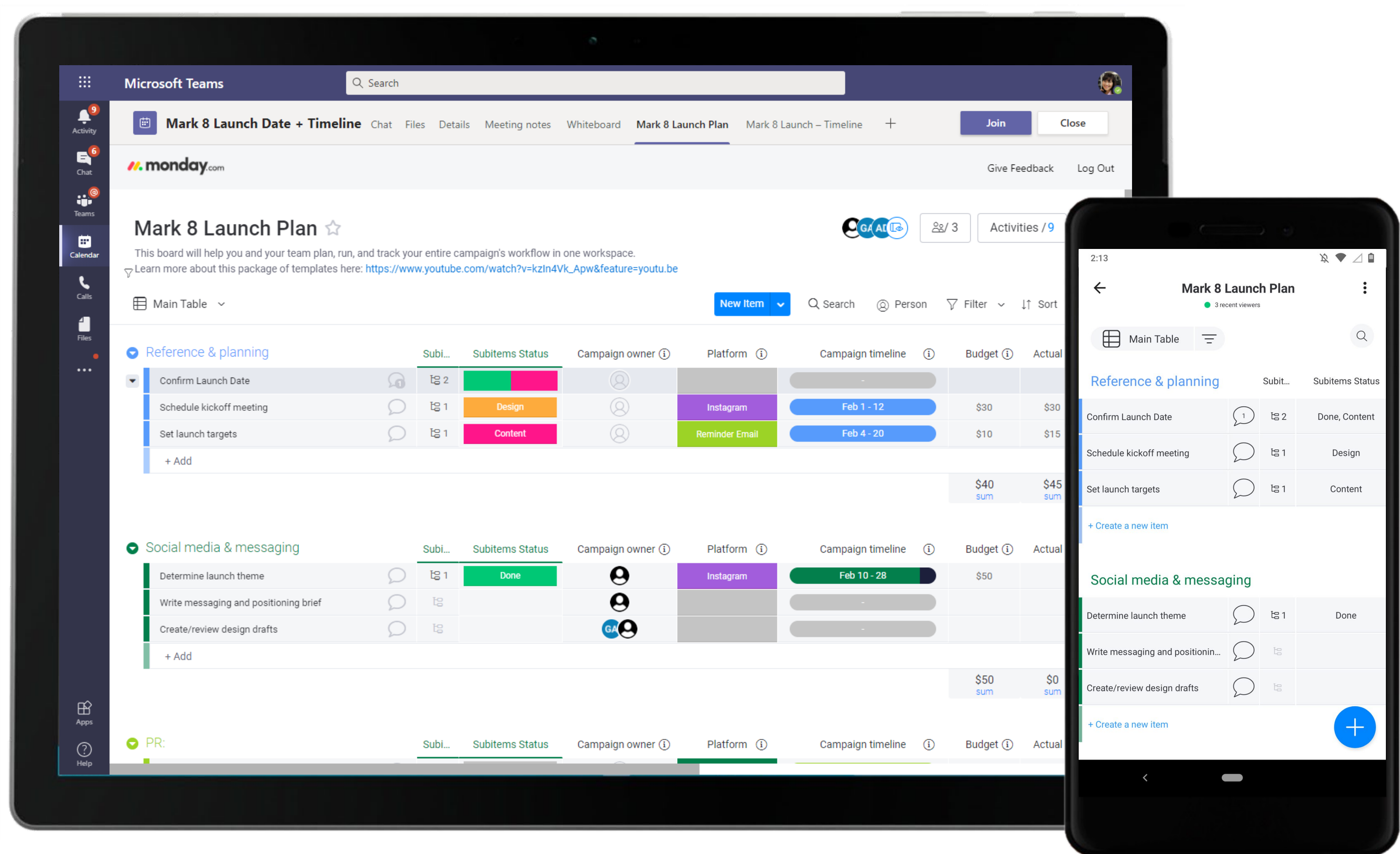
Live captions can make your meeting more inclusive to participants who hard-of-hearing, people with different levels of language proficiency, and participants in loud places by giving them another way to follow along.



With monday.com you can create tasks and add them to relevant groups to efficiently stay on top of multiple workstreams without leaving the meeting interface.



monday.com in meetings allows you to discuss tasks during the meeting, making it easy for everyone to stay on the same page and understand what needs to be done with context.



**Mark 8 Launch Plan** ☆

This board will help you and your team plan, run, and track your entire campaign's workflow in one workspace.  
Learn more about this package of templates here: [https://www.youtube.com/watch?v=kzln4Vk\\_Apw&feature=youtu.be](https://www.youtube.com/watch?v=kzln4Vk_Apw&feature=youtu.be)

Give Feedback Log Out

GA AI

3 / 3 Activities / 9

Main Table

New Item

Search Person Filter Sort

### Reference & planning

	Subi...	Subitems Status	Campaign owner	Platform	Campaign timeline	Budget	Actual
Confirm Launch Date	2						
Schedule kickoff meeting	1	Design		Instagram	Feb 1 - 12	\$30	\$30
Set launch targets	1	Content		Reminder Email	Feb 4 - 20	\$10	\$15
						\$40 sum	\$45 sum

### Social media & messaging

	Subi...	Subitems Status	Campaign owner	Platform	Campaign timeline	Budget	Actual
Determine launch theme	1	Done		Instagram	Feb 10 - 28	\$50	
Write messaging and positioning brief							
Create/review design drafts							
						\$50 sum	\$0 sum

### PR:

	Subi...	Subitems Status	Campaign owner	Platform	Campaign timeline	Budget	Actual
--	---------	-----------------	----------------	----------	-------------------	--------	--------

### Mark 8 Launch Plan

3 recent viewers

Main Table

### Reference & planning

	Subi...	Subitems Status
Confirm Launch Date	2	Done, Content
Schedule kickoff meeting	1	Design
Set launch targets	1	Content

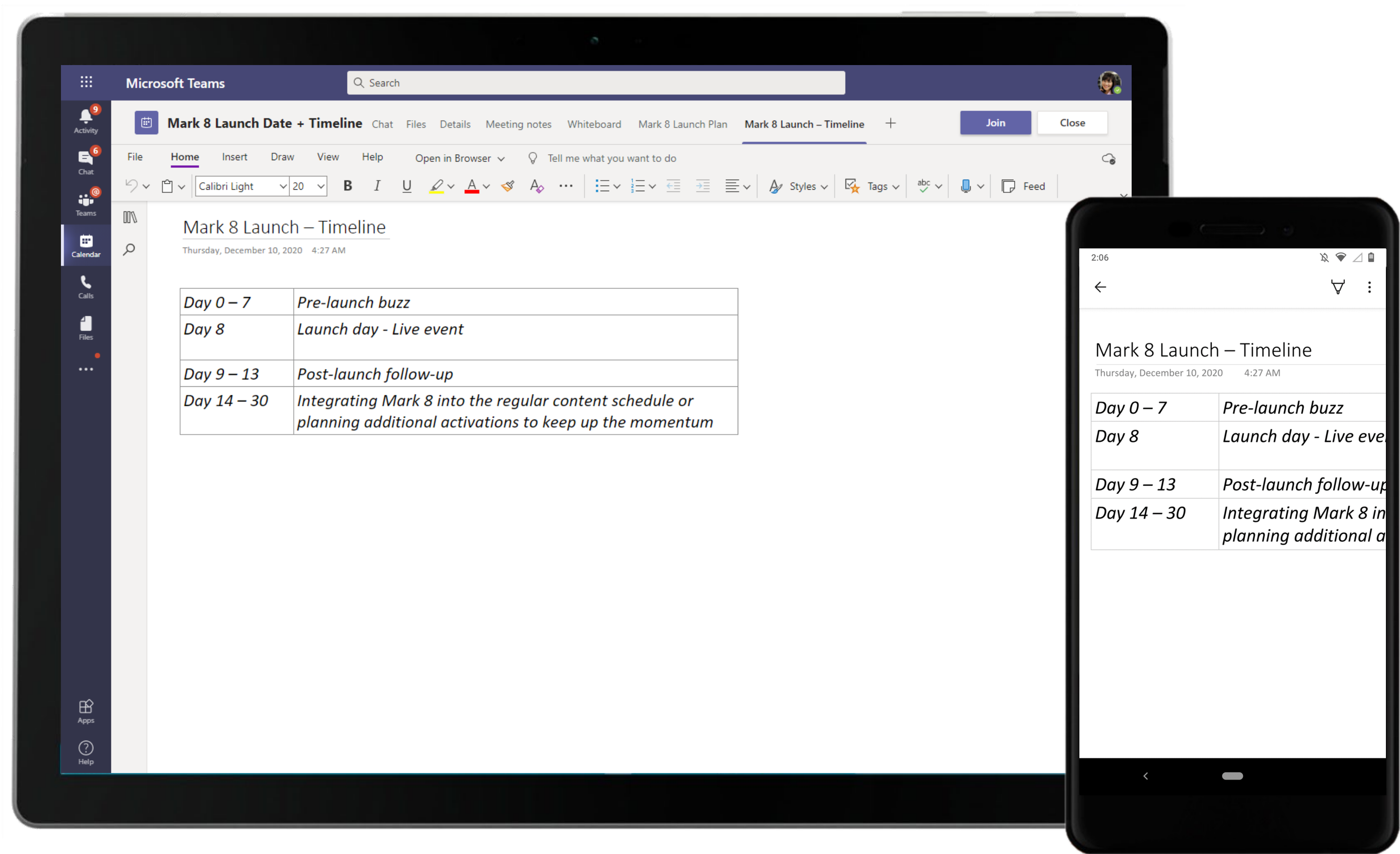
+ Create a new item

### Social media & messaging

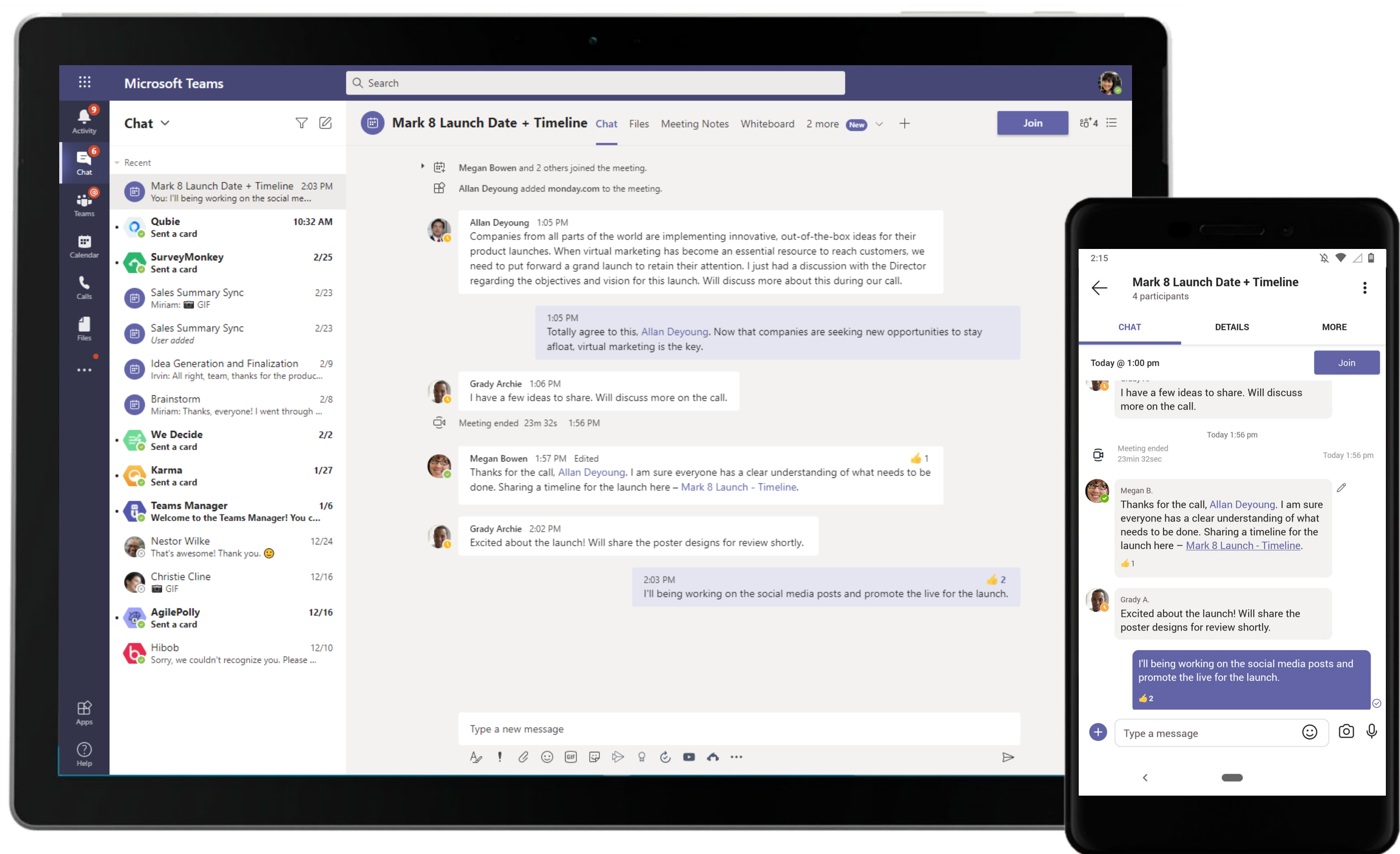
	Subi...	Subitems Status
Determine launch theme	1	Done
Write messaging and positionin...		
Create/review design drafts		

+ Create a new item

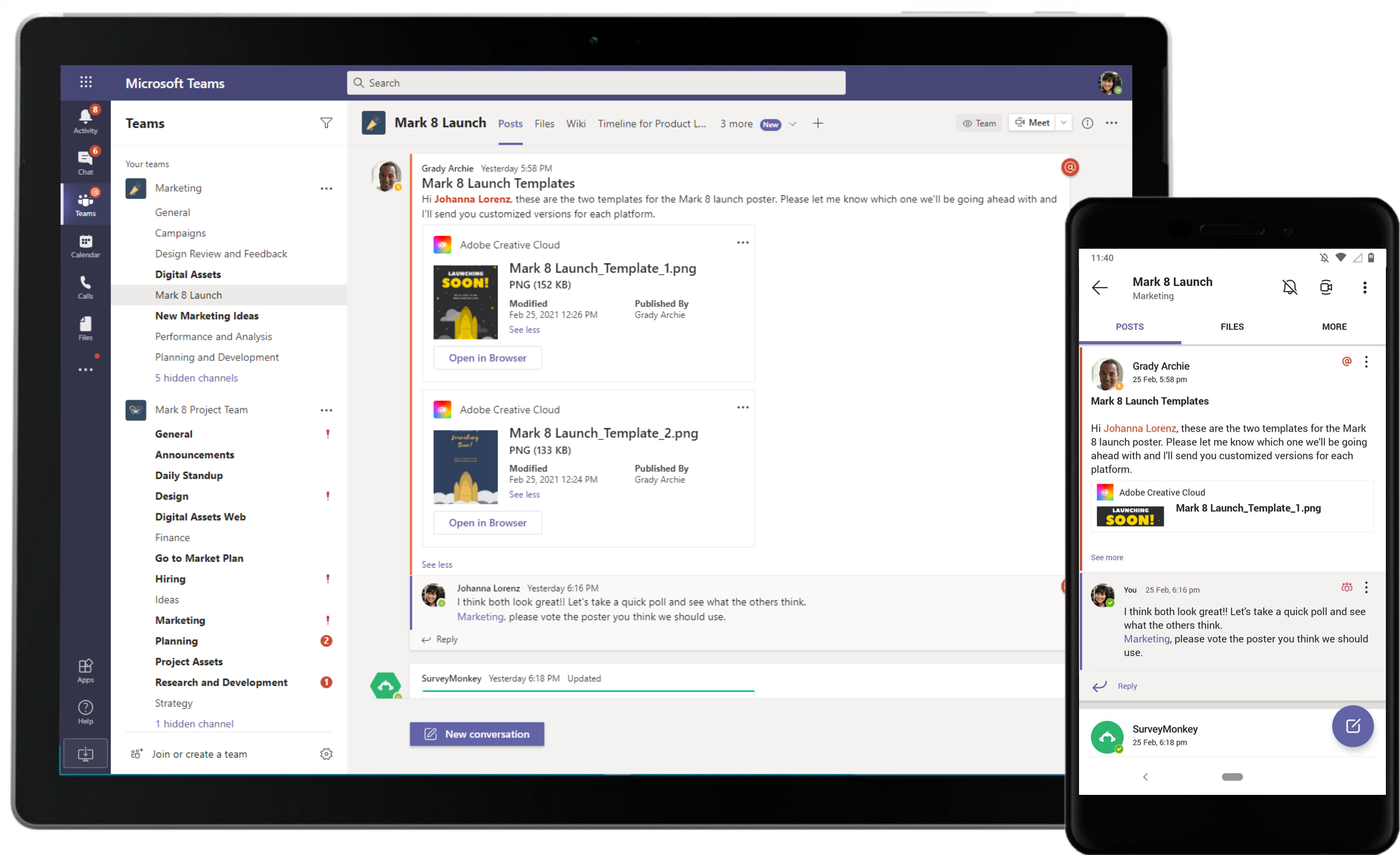
No more disjointed tools, frequent miscommunications, and chasing status updates. monday.com in Microsoft Teams connects your team so you can continue to collaborate, manage and track work in one easy-to-use platform, wherever you are.



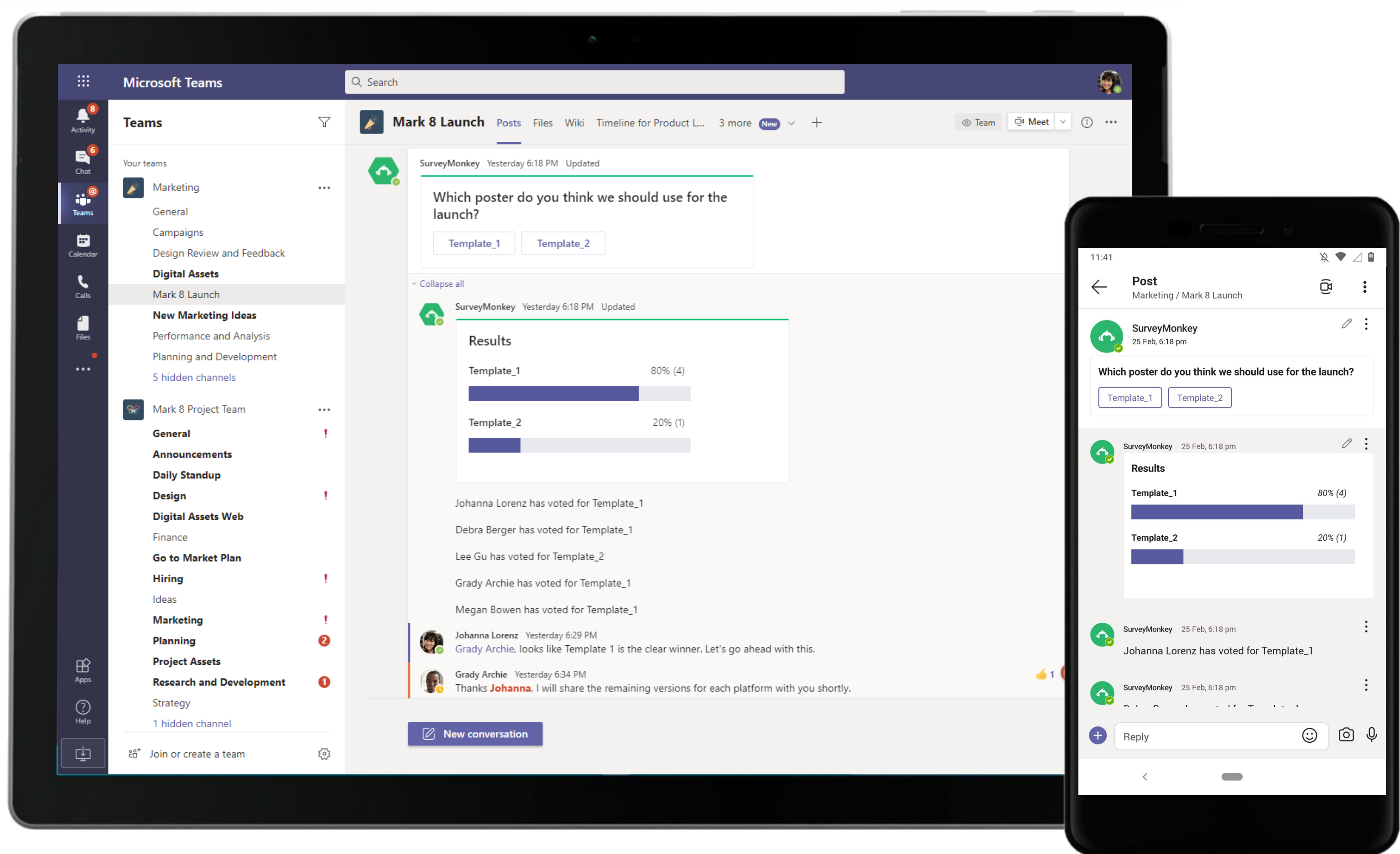
Collaborative and powerful document creation with OneNote in Microsoft Teams. Quickly disseminate meeting outcome, notes and action items among team members with OneNote tabs that can be pinned to any channel or meetings.



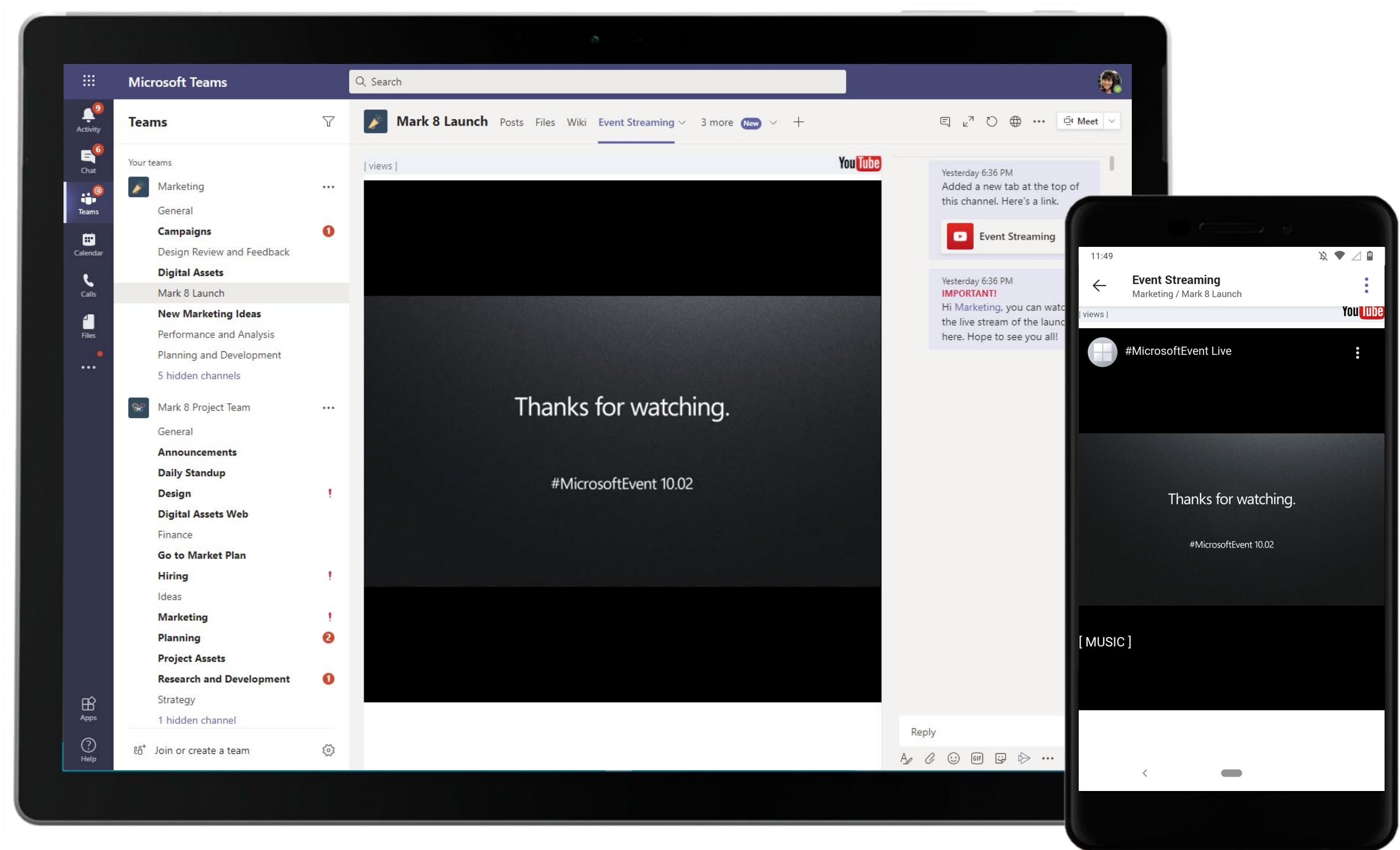
Share important information, updates, files, tasks and more within a meeting chat for a collaborative meeting experience.



Share and collaborate over creative assets within a channel using Adobe Creative Cloud. The Social Media Manager views the assets shared by the Graphic Designer in a Teams channel.



Get real-time feedback with quizzes, polls and pre-built surveys with SurveyMonkey. Set notifications for new survey responses or comments from team members within Microsoft Teams.



Share a YouTube video with other members of the channel. Simply search for the video you want and add it as a channel tab or paste its URL in your Teams channel.



# Collaborate & Design

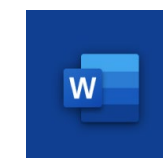
Check out how the Marketing team can use Microsoft Teams to keep your business running efficiently and address unexpected situations with confidence.

## Marketing Superpowers in Teams

### Capabilities and features used...

- Schedule meetings using synced calendars, or a meet now feature
- Participate in instant, open-channel communication
- Store documents within a cloud-enabled repository using OneDrive or SharePoint
- Create and collaborate on documents, spreadsheets, presentations and more in the cloud with Office 365
- Channel tabs for everyone to stay on the same page
- Easily collaborate with teammates on multiple projects from within a single environment

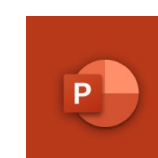
### Apps that enable an immersive experience in Teams



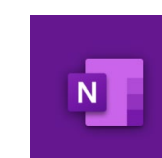
Word



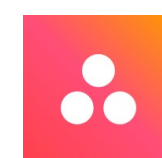
Excel



PowerPoint



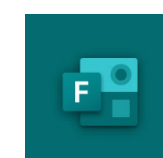
OneNote



Asana



HunchBuzz



Forms



Power BI



Lucidchart



MailChimp



Calendar  
BOT



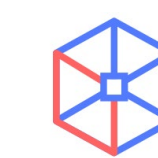
Google  
Analytics



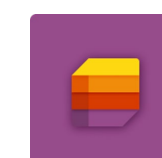
Adobe  
Creative  
Cloud



Presentations  
AI



Ment.io



Lists



Tasks by  
Planner  
and To Do



Prezi Video

# Meet the Business Decision Makers

## Marketing



### Marketing Executive

*"Marketing is not simply a campaign or a tactic, it's a commitment."*

- Develop efficient and intuitive marketing strategies
- Organize and oversee advertising and communication campaigns (social media, TV etc.)
- Conduct market research and analysis to evaluate trends and competition ventures



### Marketing Manager

*"Marketing team's job is never done. It's about perpetual motion. We must continue to innovate every day."*

- Track and analyze the performance of advertising campaigns
- Manage the marketing budget and ensuring that all marketing material is in line with the brand identity
- Develop strategies to maximize profits and increase market share

# Meet the Business Decision Makers

## Marketing



### Brand Strategist

*"A brand for a company is like reputation for a person. You earn reputation by trying to do hard things."*

- Collaborate with marketing team and stakeholders to ideate and execute marketing plans
- Create guidelines that define company's voice both online and offline
- Conduct competitive research to identify our strengths and weaknesses



### Graphic Designer

*"I strive for two things in design: simplicity and clarity. Great design is born of those two things."*

- Study design briefs and determine requirements
- Ensure final graphics and layouts are visually appealing and on-brand
- Ensure final graphics and layouts are visually appealing and on-brand



# Crowdsource Marketing Ideas

## Marketing Executive

### Scenario Walkthrough

As a company that prides itself on strategy experimentation and openness to new ideas, Contoso wants to crowdsource ideas for a new marketing campaign. To launch a successful marketing initiative, the Marketing team needs a place to synchronize with the product team. The Marketing executive collaborates with the team over Microsoft Teams to strategize and create an impactful marketing plan.

- Participates in a meeting to discuss crowdsourcing of ideas from the employees for a new marketing campaign.
- Oversees a task board and assigns them to team members using Tasks by Planner and To Do.
- Shares a Prezi Video with ideas and suggestions for the marketing plan.
- Views challenge created by the Marketing Manager on HunchBuzz.
- Reviews ideas suggested by the employees and requests the Marketing team to pick the best ones.

### How did Microsoft Teams help the Product Manager execute her roles and responsibilities?

- Use a dedicated channel to communicate and coordinate with relevant team members.
- Easily create and share video updates to make your messages more effective with Prezi Video.
- Assign, track, and communicate tasks and milestones without having to switch apps with Tasks by Planner and To Do.
- Crowdsource ideas from employees, partners, and customers using HunchBuzz.

### Which app integrations on Teams made it possible?



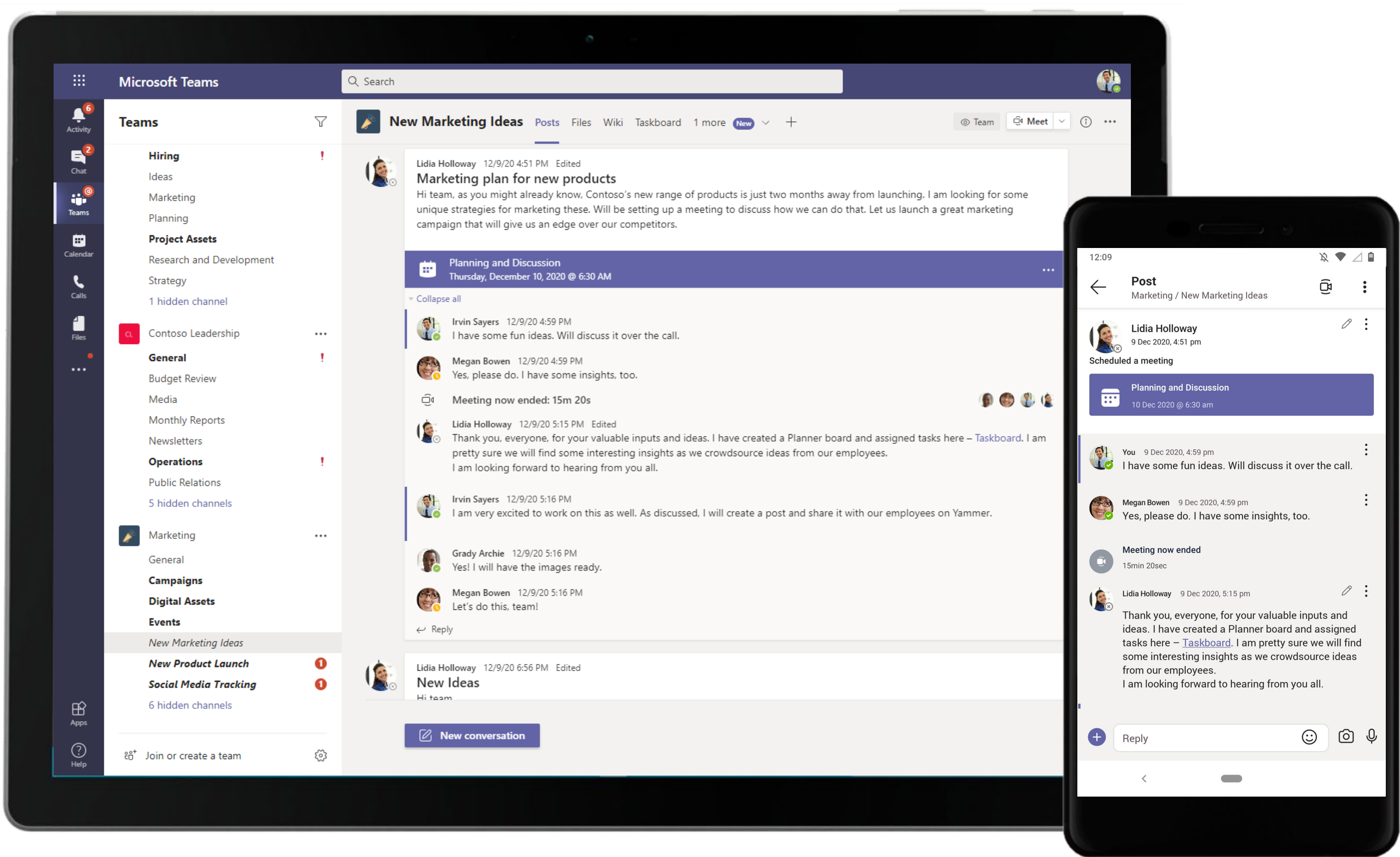
Prezi Video



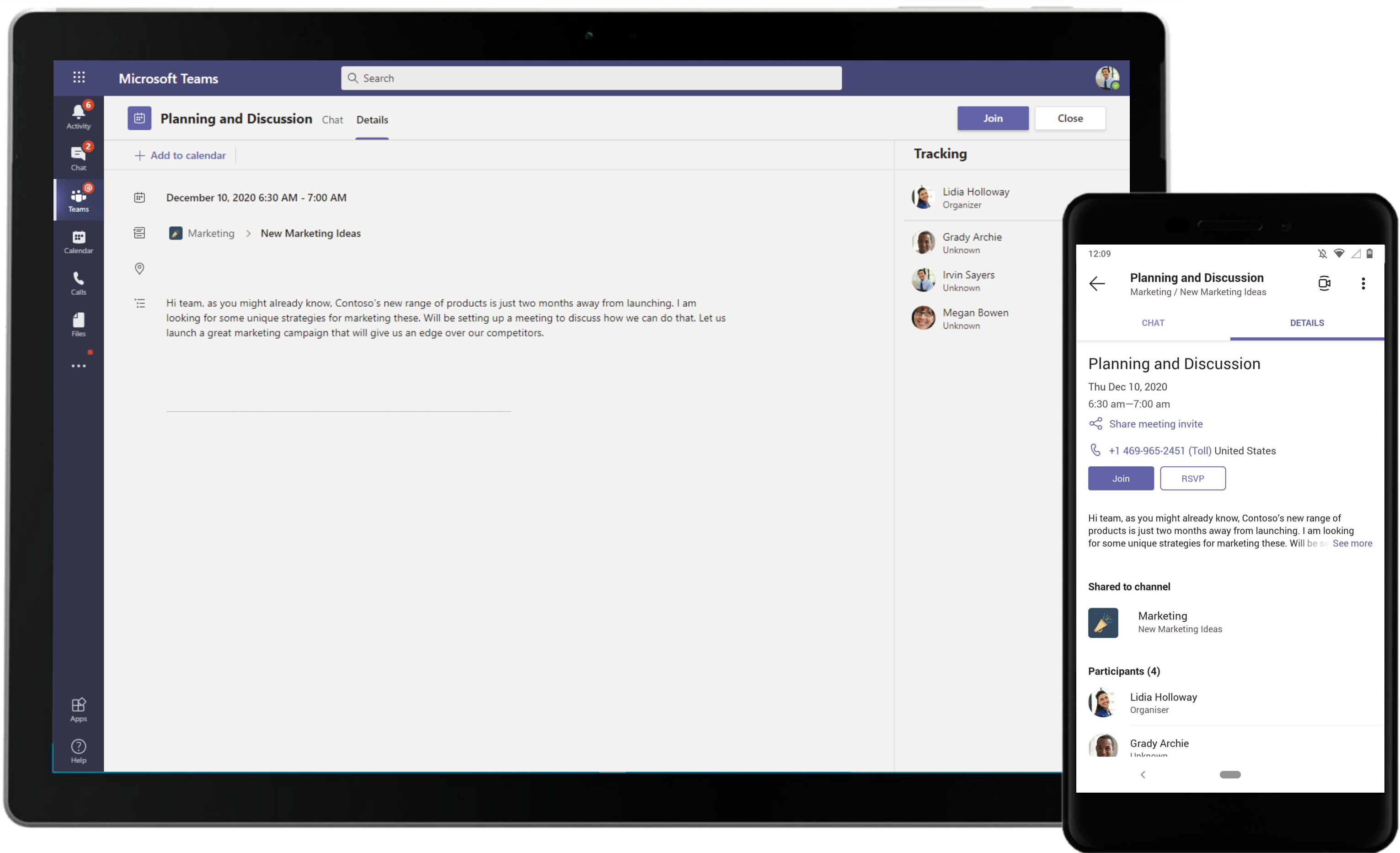
HunchBuzz



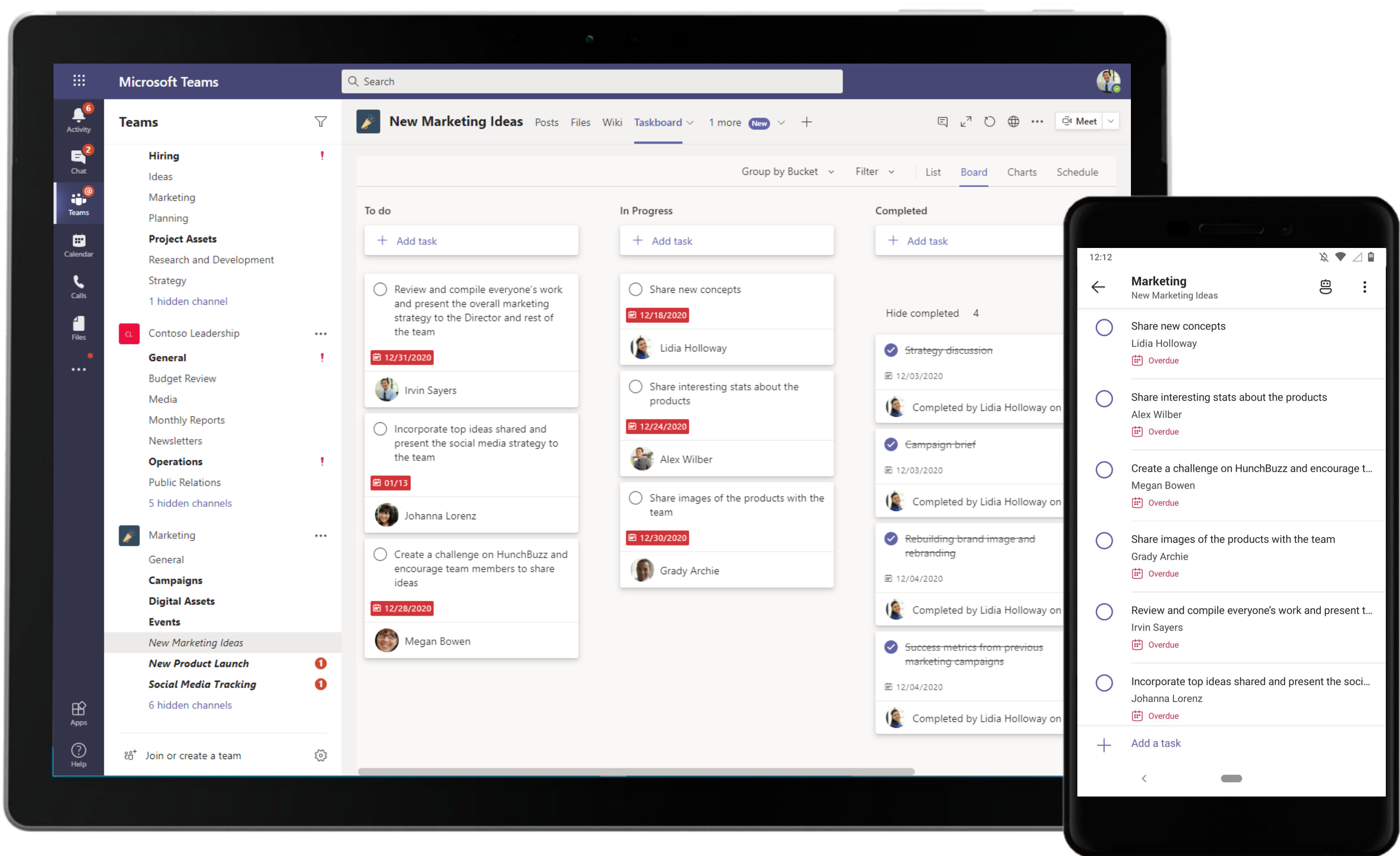
Tasks by Planner  
and To Do



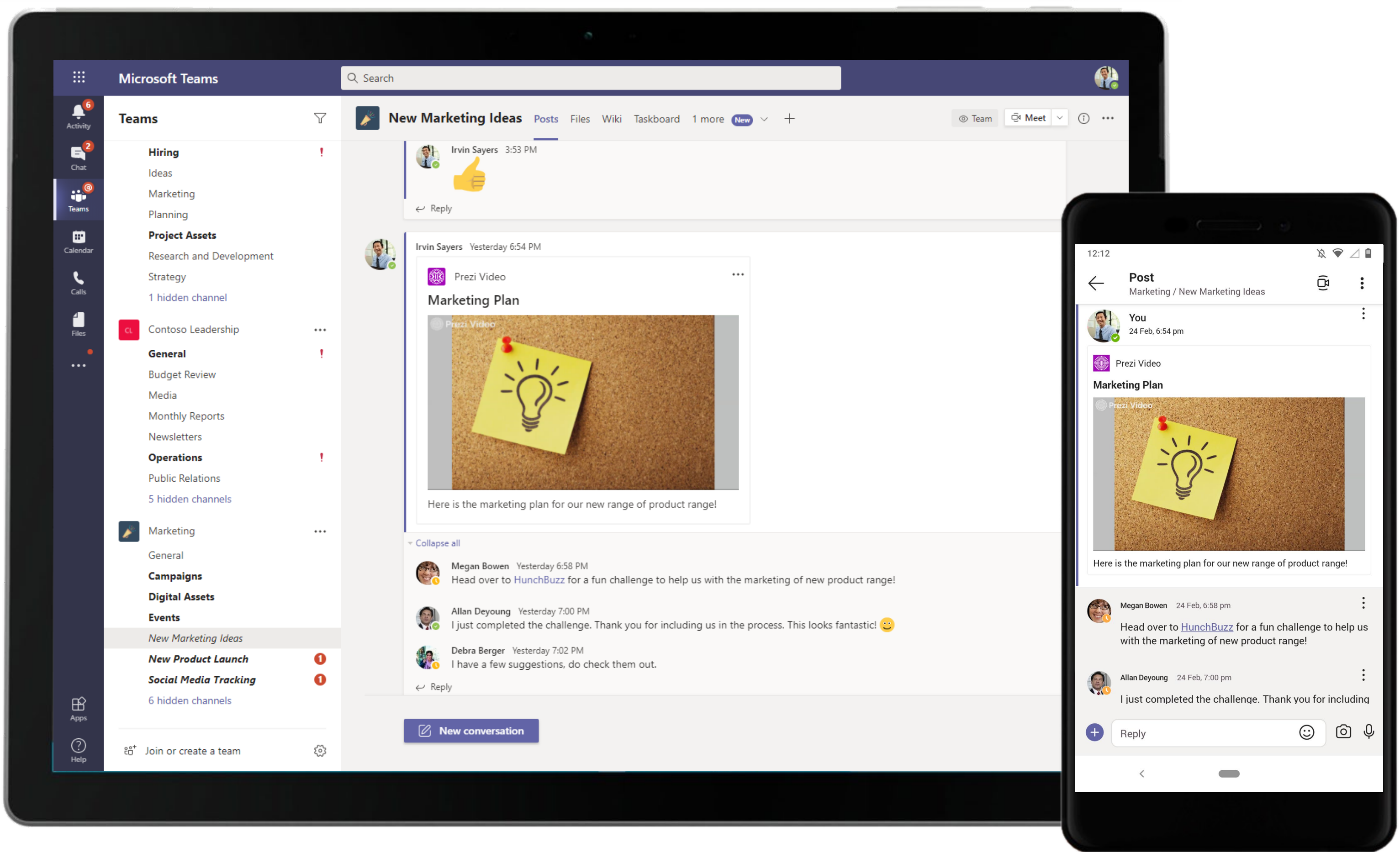
Teams and channels are where you hold meetings, have conversations and work on files together with team members. The Marketing Executive participates in a meeting to discuss crowdsourcing of ideas from employees.



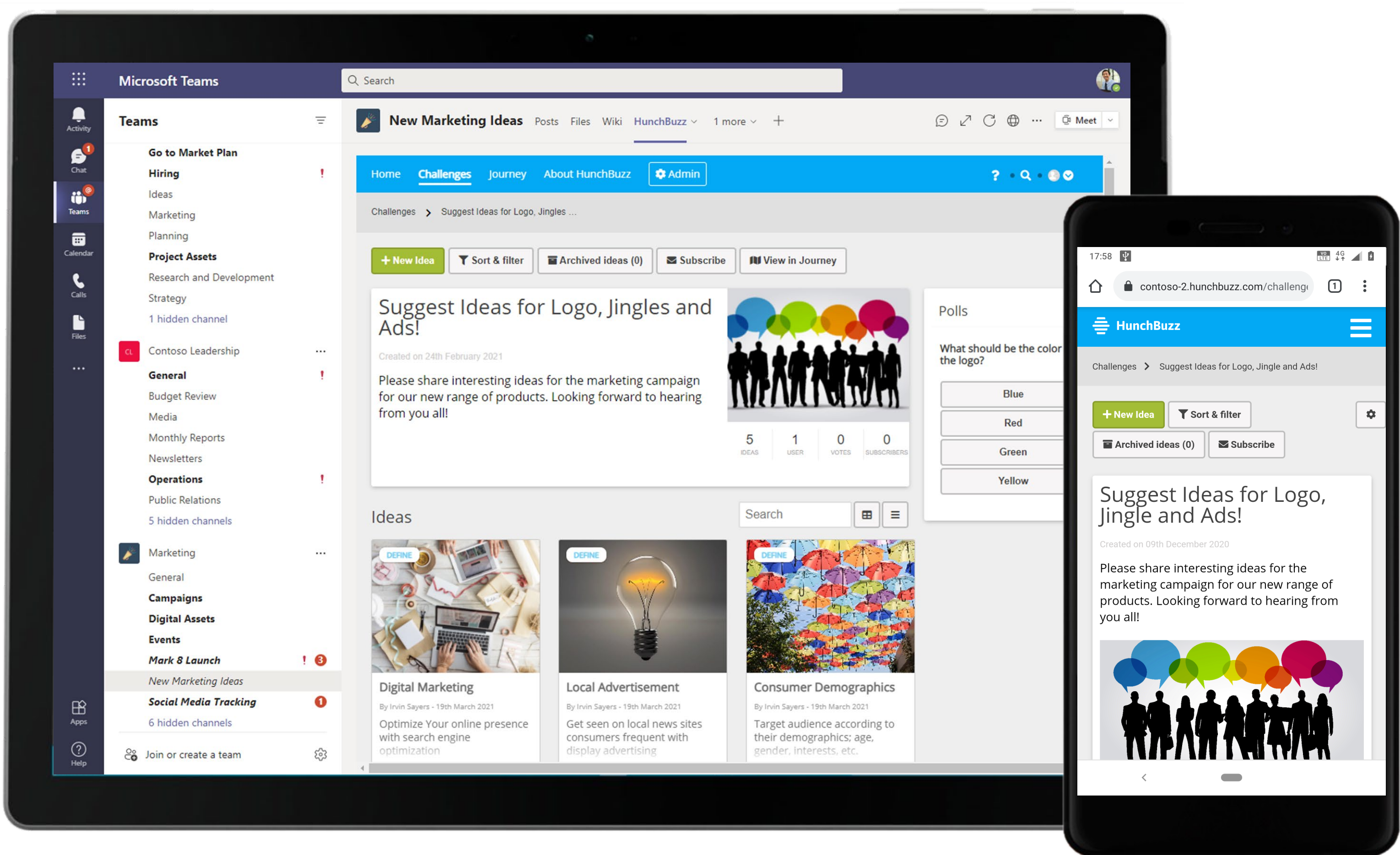
Meeting attendees can view meeting details, accept the meeting invite and view the list of meeting participants.



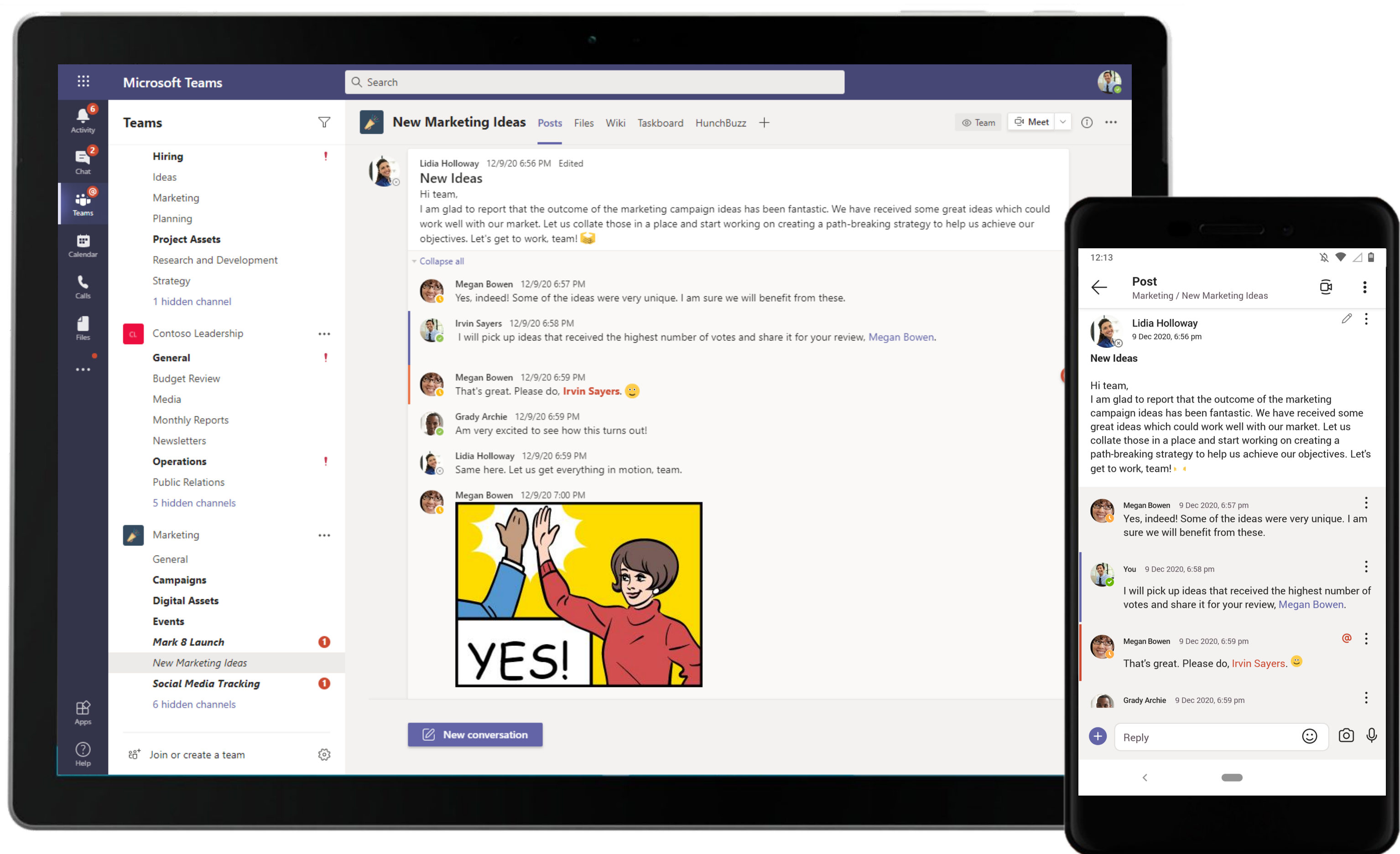
Speedy plan mobilization using task assignment and delegation is done best using Tasks by Planner and To Do . Tasks by Planner and To Do in Teams also allows the team to track tasks, see assignments, status and manage workflows without leaving the application.



Use Prezi Video in Microsoft Teams to make your message stand out and get across loud and clear. The Marketing Executive shares a video with ideas and suggestions for the marketing plan.



Use HunchBuzz in Teams to capture and recognize new thinking, identify challenges and uncover opportunities to improve processes, products, services and business models. Engage employees and customers in the innovation process and encourage collaboration to solve business problems.



Microsoft Teams conversations are threaded so users can reply directly in-context to specific conversations. Intense in moments of work flurry, these channels also see a fair amount of levity with GIFs, stickers and emojis that makes working together fun!



# Collaborate with Sales to Create Successful Campaigns

## Marketing Manager

### Scenario Walkthrough

Campaigns and launches are an essential part of marketing initiatives. Ensuring they are impactful, requires teamwork, planning, and seamless execution. See how the Marketing Manager coordinates with the Sales team to eke out a successful marketing campaign using real sales and revenue insights within Microsoft Teams.

- Looks for a free time slot via Calendar BOT and schedules a meeting to discuss points with the Sales team members.
- Participates in the meeting, views the Power BI during the call, with valuable inputs from the Sales team.
- Shares the campaign document with the team for making changes collaboratively and for version control.
- Participates in another meeting, creates MURAL board with adding the finalized ideas in it, and shares it with the team.
- Asks the Social Media Manager to work on the latest campaign customizations.
- Reviews a content calendar prepared by the Social Media Manager and asks the team to launch the campaign.

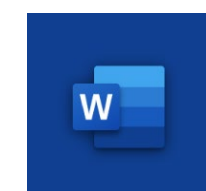
### How did Teams help the Marketing Manager execute her roles and responsibilities?

- Enable calendar comparison and scheduling a meeting with Calendar BOT.
- Facilitate data-driven decisions informed by visualizations and scoring in Power BI.
- Co-author documentation through established channels and collaborate using Office applications like Word.
- Brainstorm, ideate, and collaborate over meetings using MURAL on Teams.
- Record data, organize process, and track status using Lists.

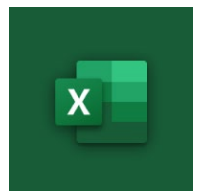
### Which app integrations on Teams made it possible?



Power BI



Word



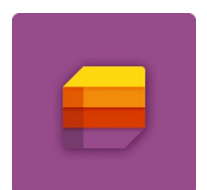
Excel



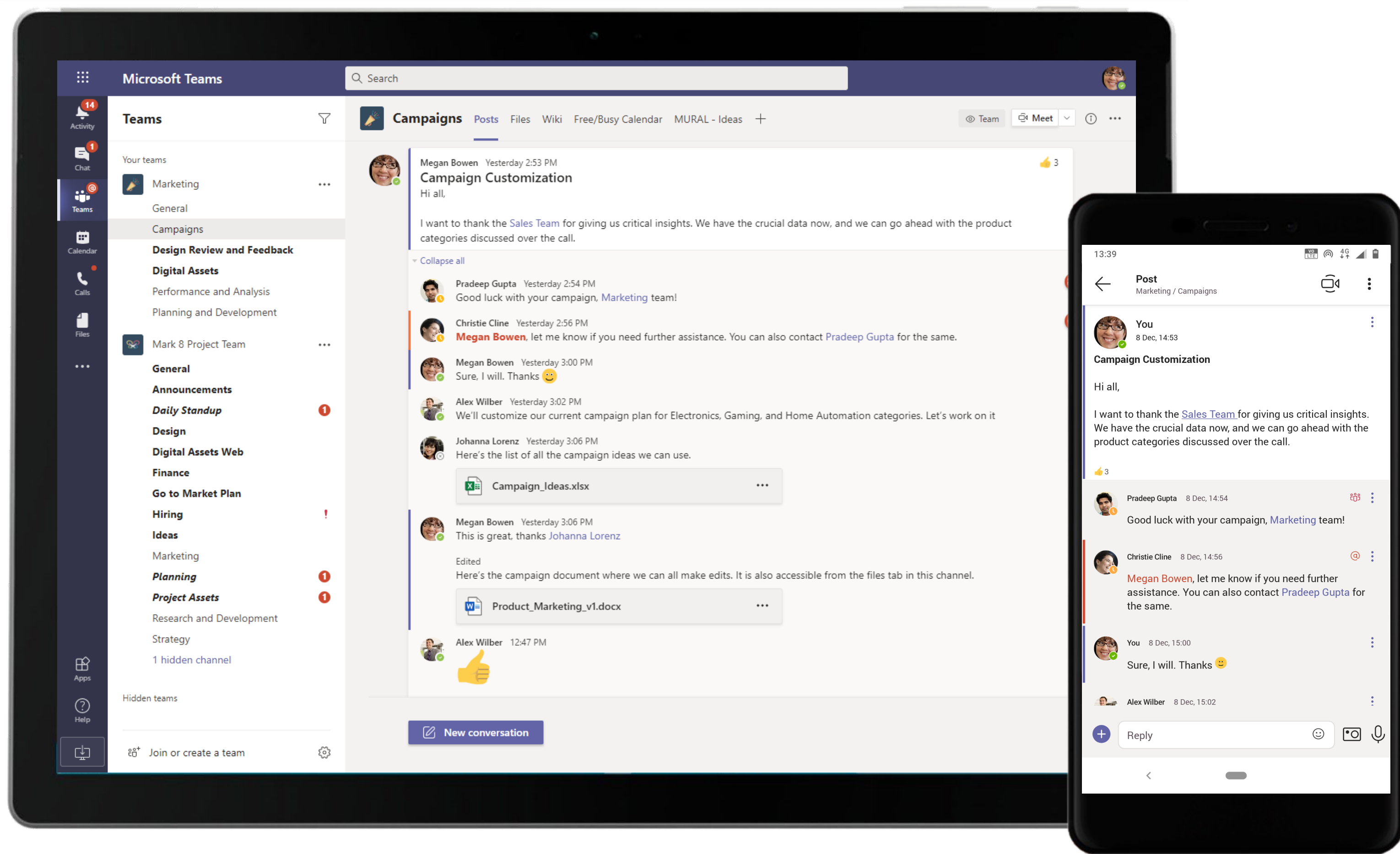
Calendar BOT



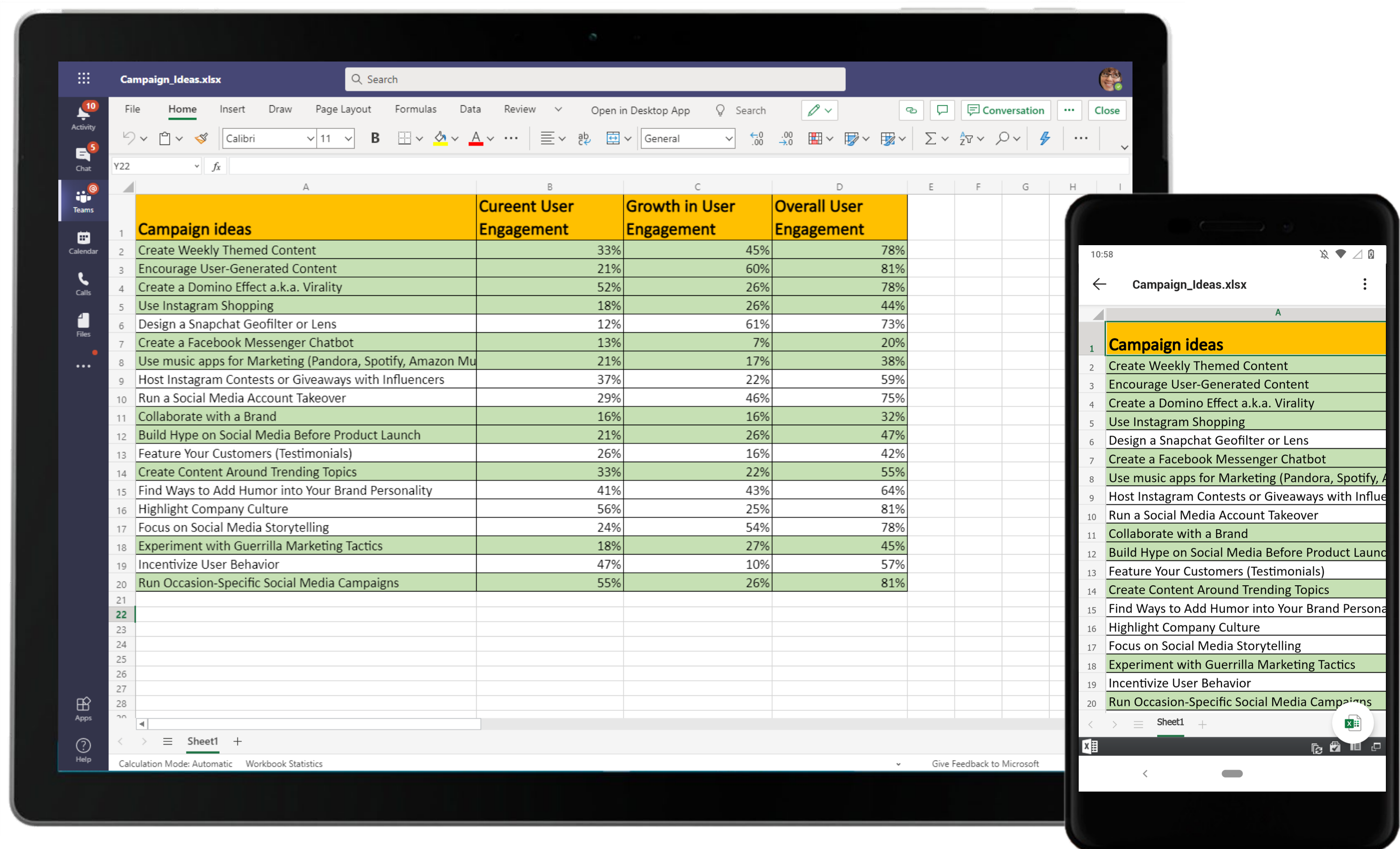
MURAL



Lists



Microsoft Teams makes it easy to share files within channels. If the files are Word, Excel, or PowerPoint files, your colleagues can even view, edit and collaborate on the files right within Teams, thanks to deeply integrated Office 365 services.

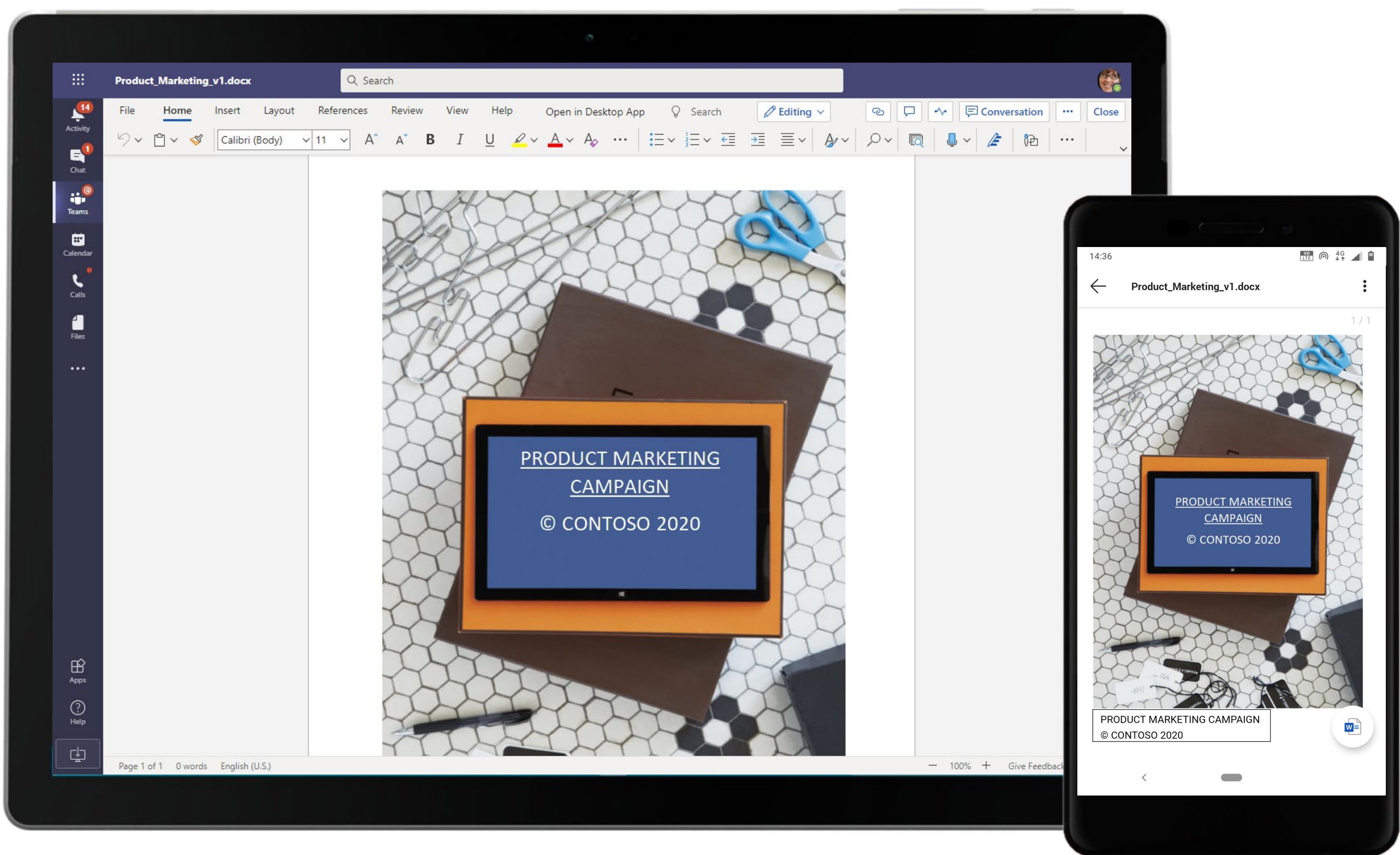


The image shows a tablet and a smartphone displaying the Microsoft Excel app. The tablet screen shows a spreadsheet titled "Campaign\_Ideas.xlsx" with the following data:

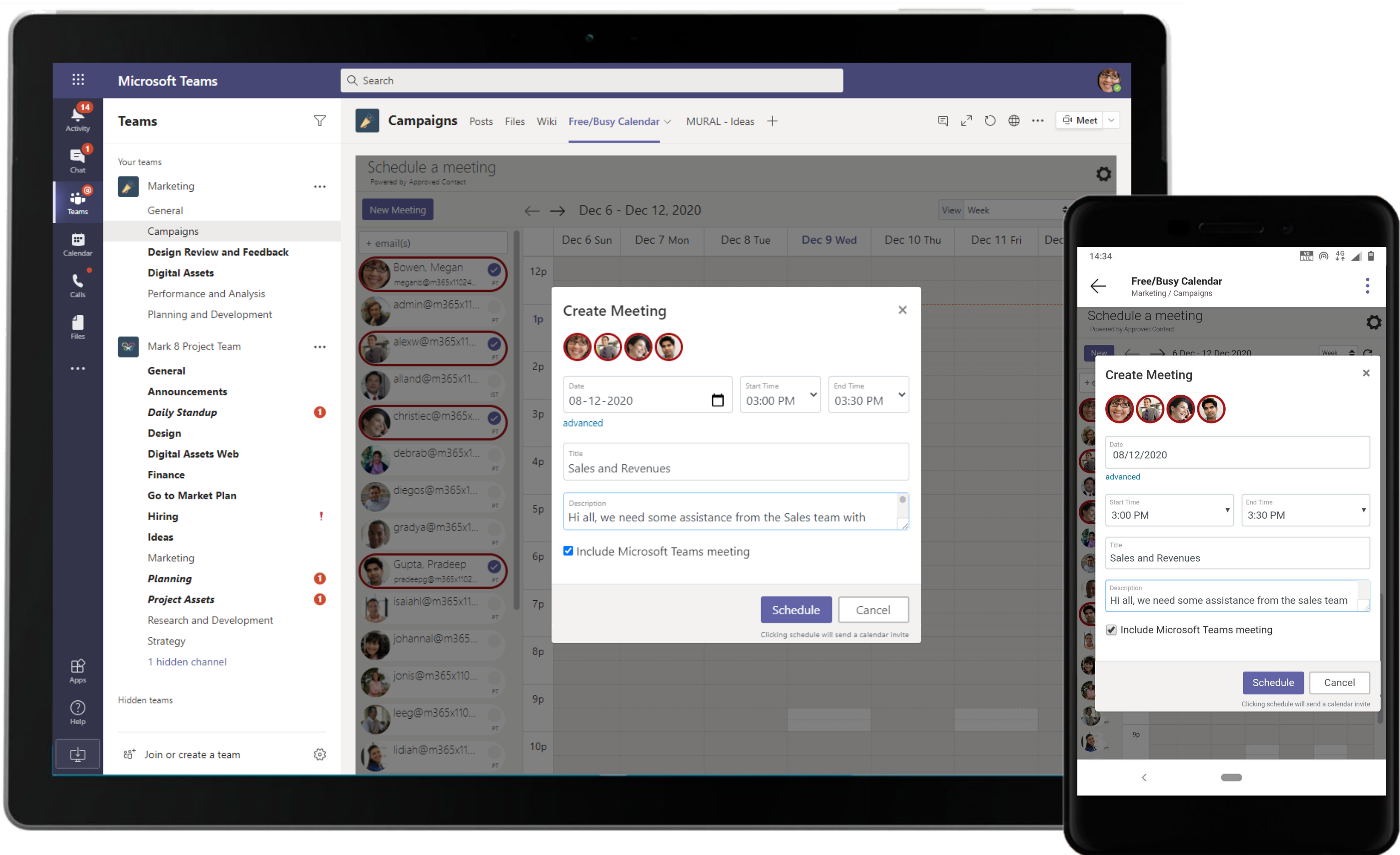
	A	B	C	D	E	F	G	H	I
	Campaign ideas	Current User Engagement	Growth in User Engagement	Overall User Engagement					
1	Create Weekly Themed Content	33%	45%	78%					
2	Encourage User-Generated Content	21%	60%	81%					
3	Create a Domino Effect a.k.a. Virality	52%	26%	78%					
4	Use Instagram Shopping	18%	26%	44%					
5	Design a Snapchat Geofilter or Lens	12%	61%	73%					
6	Create a Facebook Messenger Chatbot	13%	7%	20%					
7	Use music apps for Marketing (Pandora, Spotify, Amazon Mu	21%	17%	38%					
8	Host Instagram Contests or Giveaways with Influencers	37%	22%	59%					
9	Run a Social Media Account Takeover	29%	46%	75%					
10	Collaborate with a Brand	16%	16%	32%					
11	Build Hype on Social Media Before Product Launch	21%	26%	47%					
12	Feature Your Customers (Testimonials)	26%	16%	42%					
13	Create Content Around Trending Topics	33%	22%	55%					
14	Find Ways to Add Humor into Your Brand Personality	41%	43%	64%					
15	Highlight Company Culture	56%	25%	81%					
16	Focus on Social Media Storytelling	24%	54%	78%					
17	Experiment with Guerrilla Marketing Tactics	18%	27%	45%					
18	Incentivize User Behavior	47%	10%	57%					
19	Run Occasion-Specific Social Media Campaigns	55%	26%	81%					
20									
21									
22									
23									
24									
25									
26									
27									
28									
29									

The smartphone screen shows the same spreadsheet in a mobile view, with the columns labeled "Campaign ideas", "Current User Engagement", "Growth in User Engagement", and "Overall User Engagement".

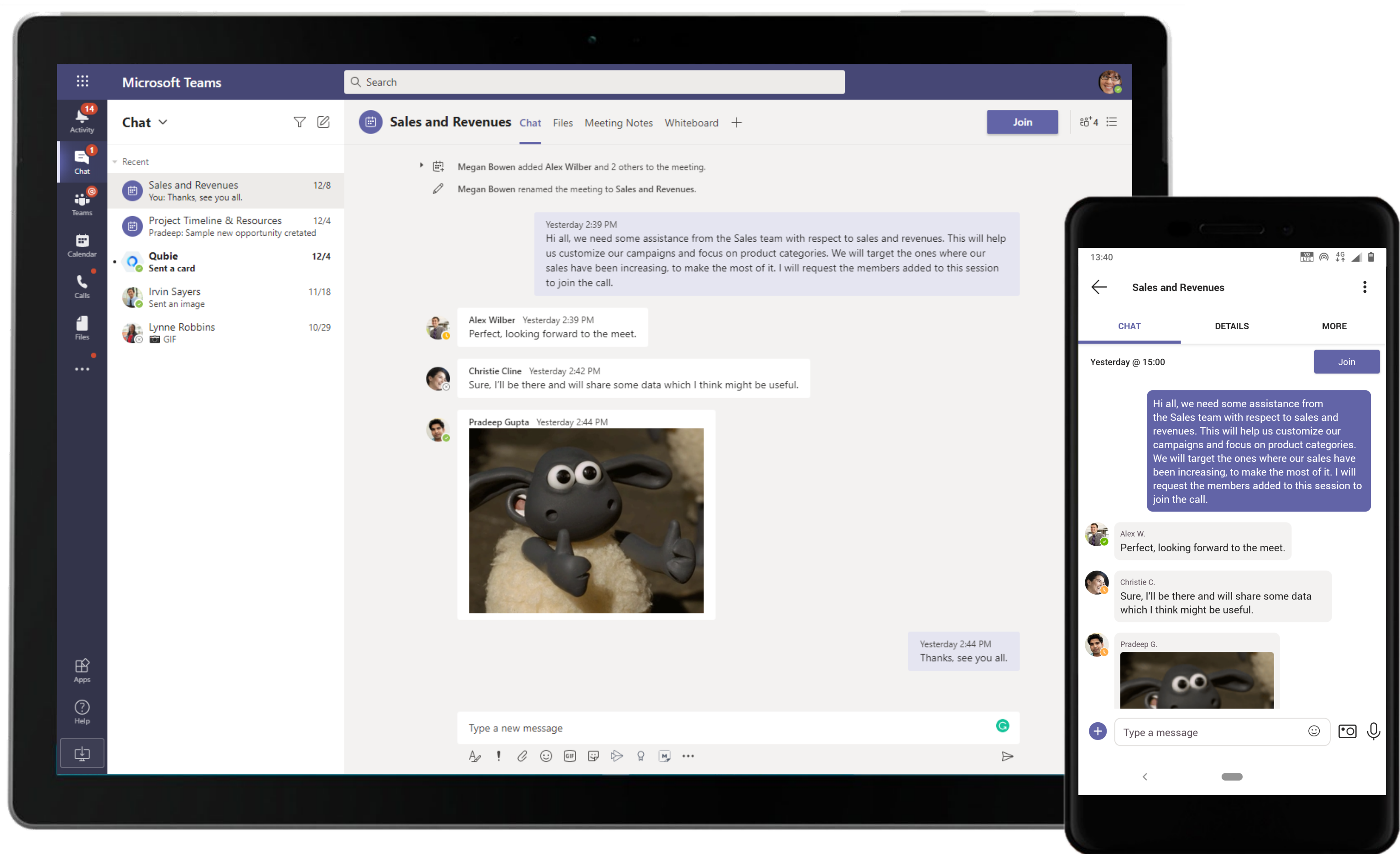
The Social Media Manager uses Excel to build and present data to the team. Create impactful summaries of crucial data with Excel for Microsoft Teams.



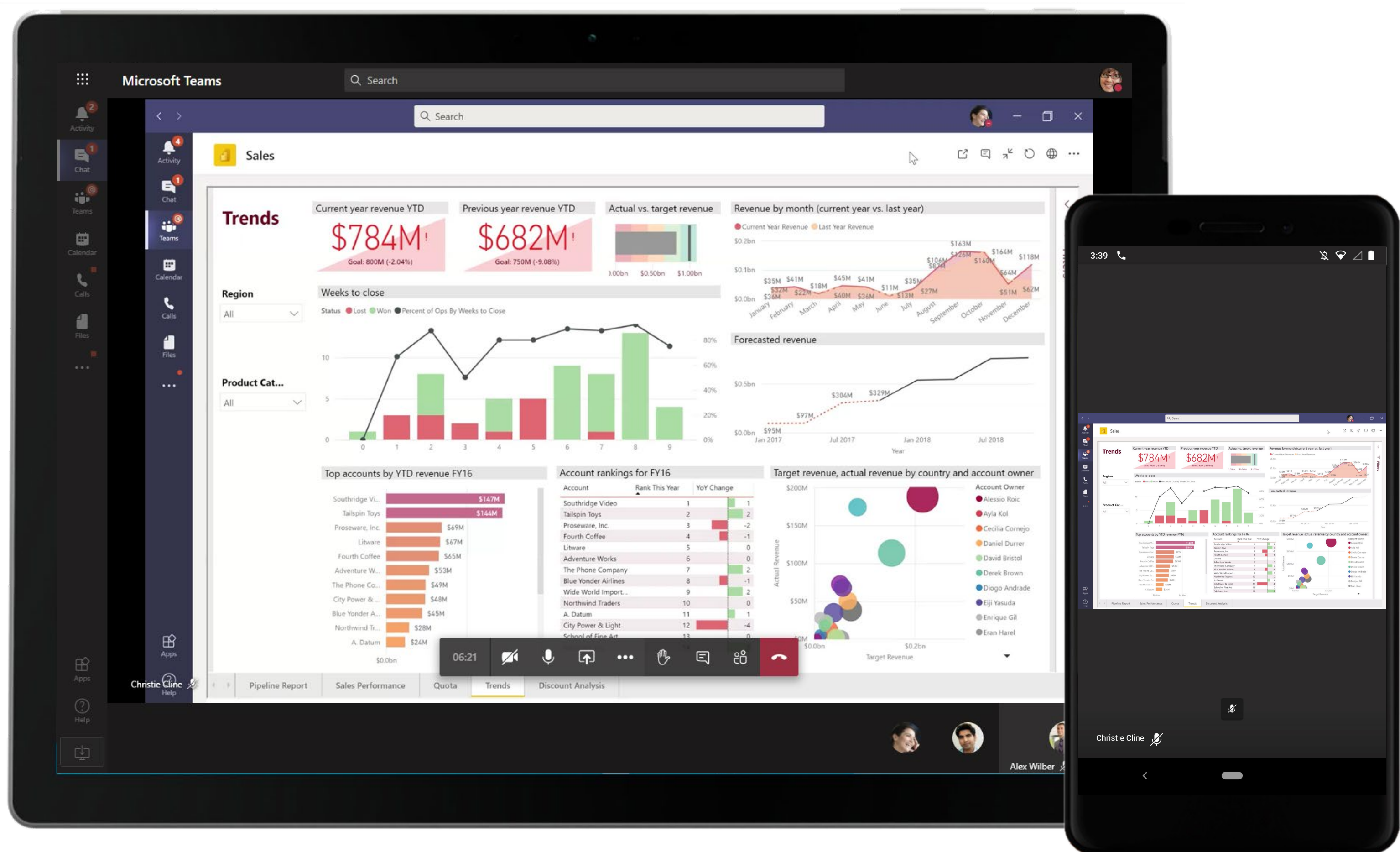
Microsoft Teams makes it easy to share files within channels. Your colleagues can view, edit and collaborate on Word files right within Teams, thanks to deeply integrated Office 365 services.



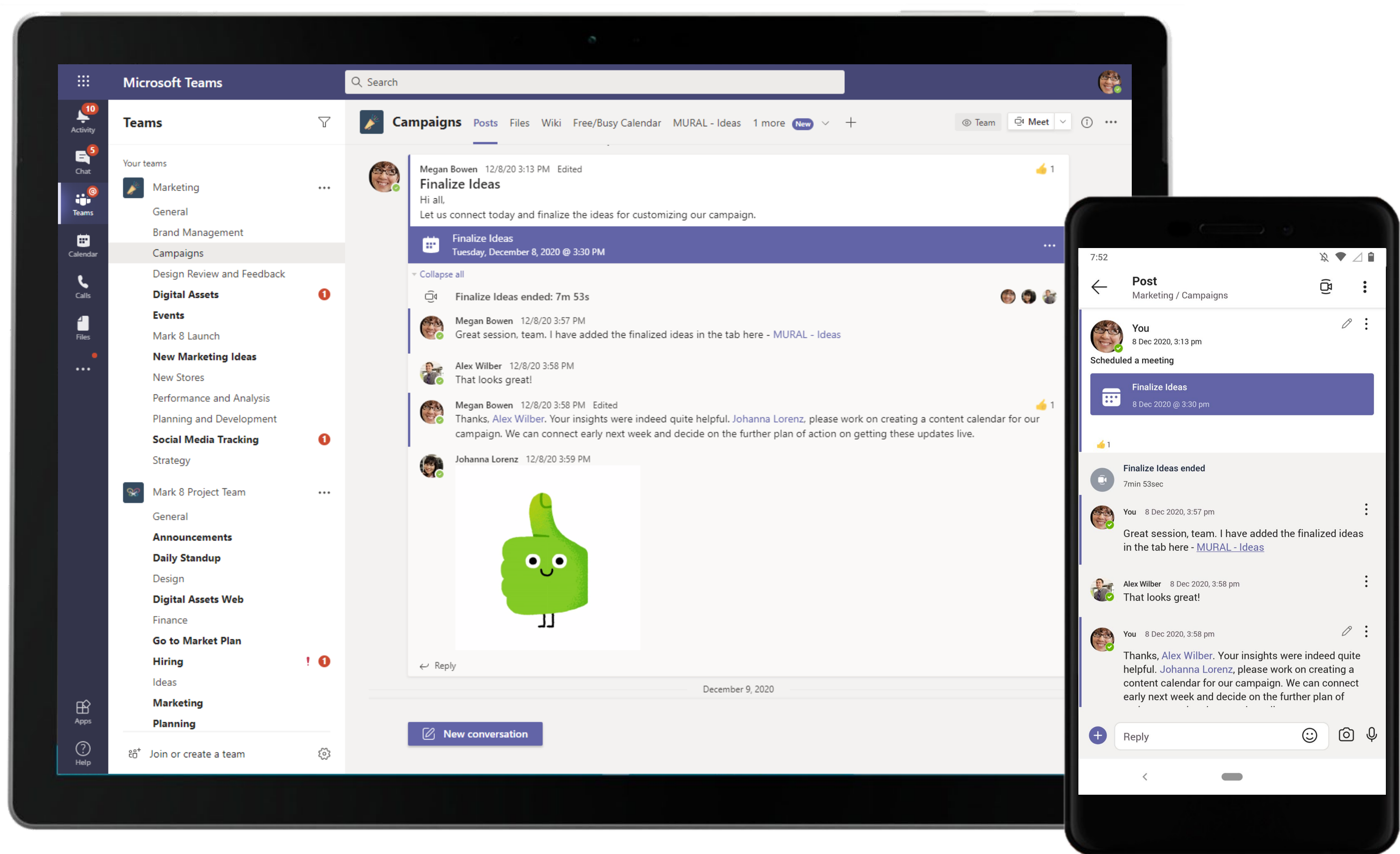
The Calendar BOT in Teams enables calendar comparison and scheduling, The Marketing Manager uses Calendar BOT to compare calendar and free time for attendees before scheduling a meeting.



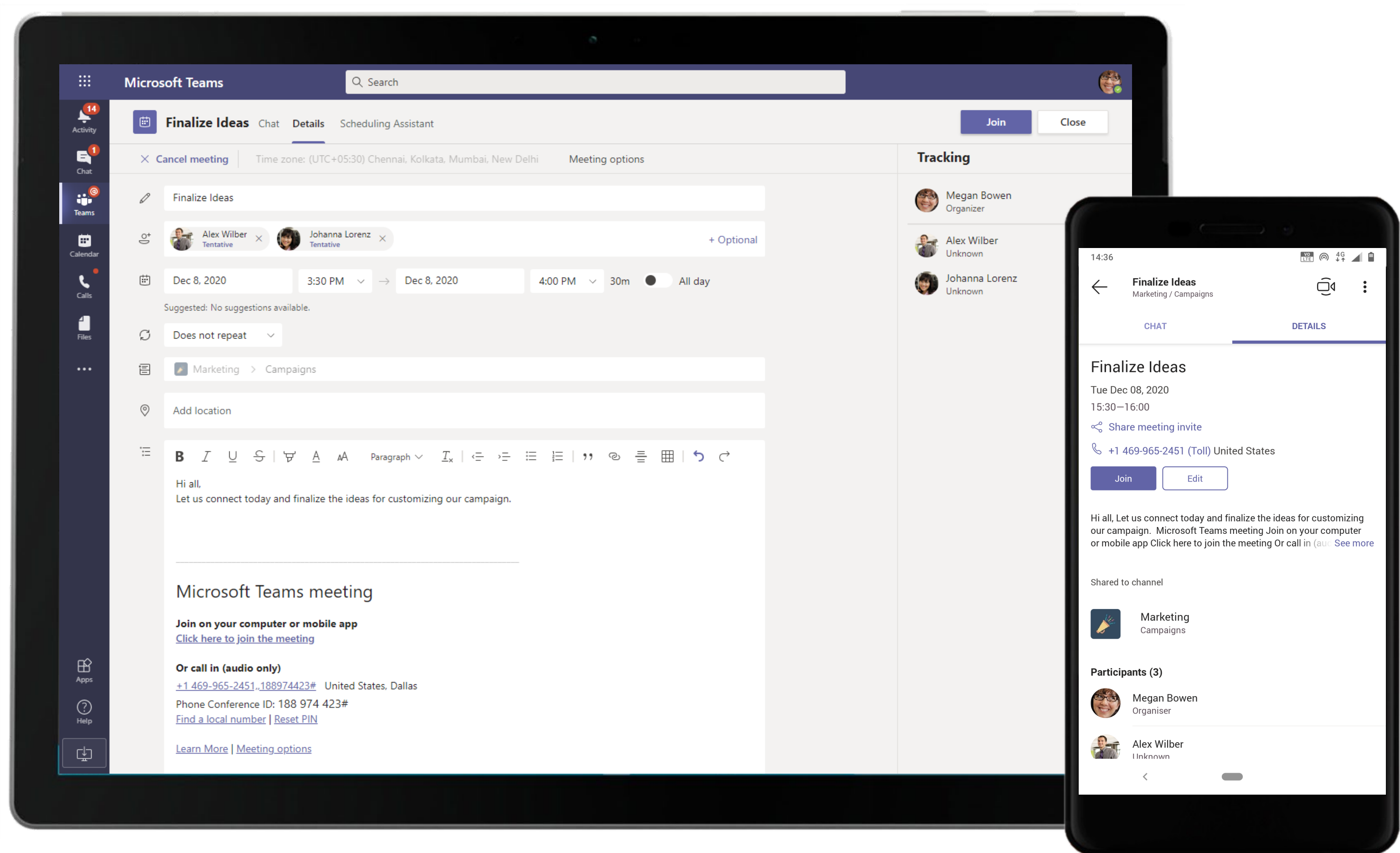
Use the meeting chat for follow-up conversation about meeting outcomes. The Marketing Manager continues to interact with the participants on the meeting chat.



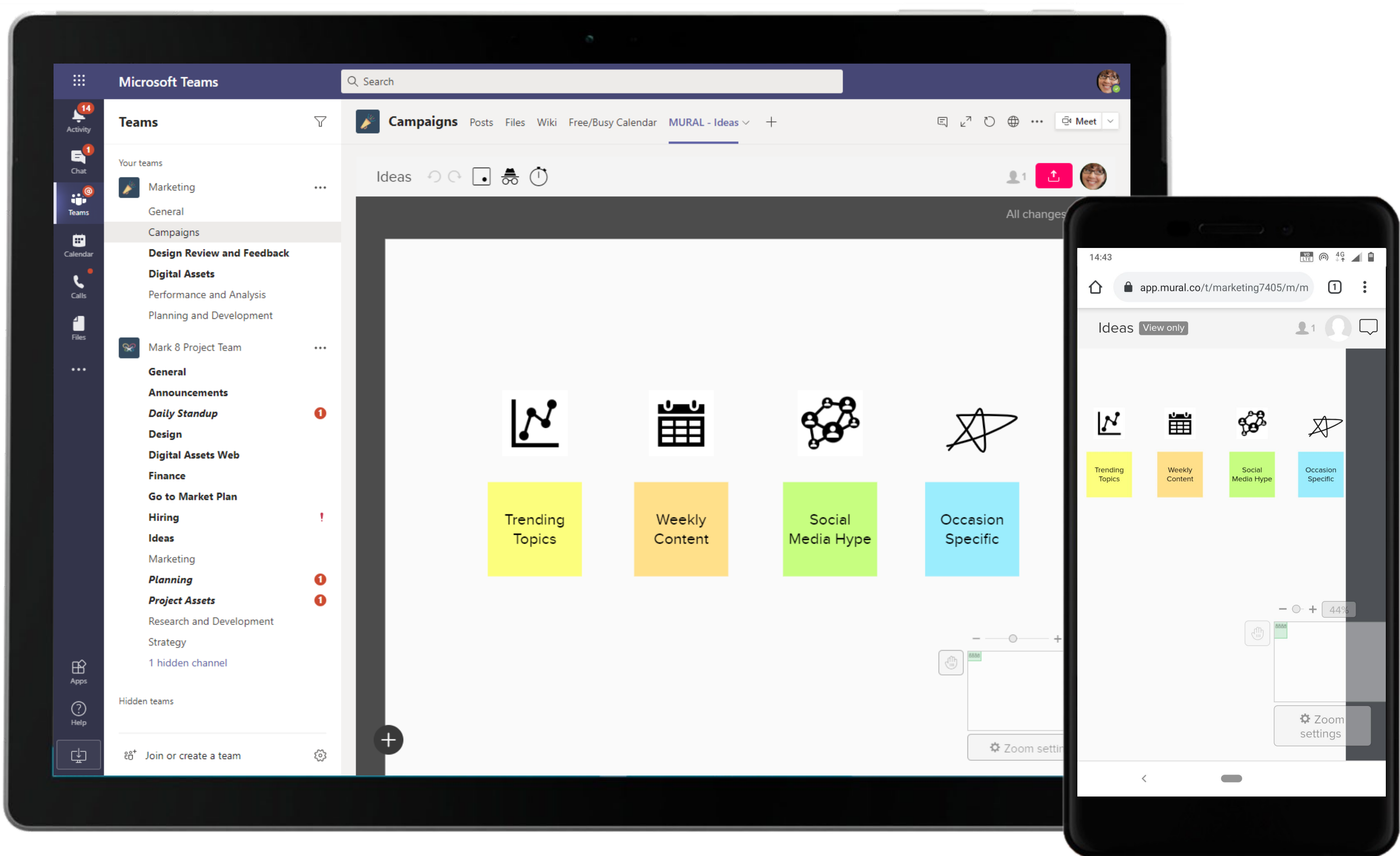
Facilitate data-driven decisions informed by visualizations and scoring in Power BI for Microsoft Teams. A team member presents data over a call using a Power BI dashboard.



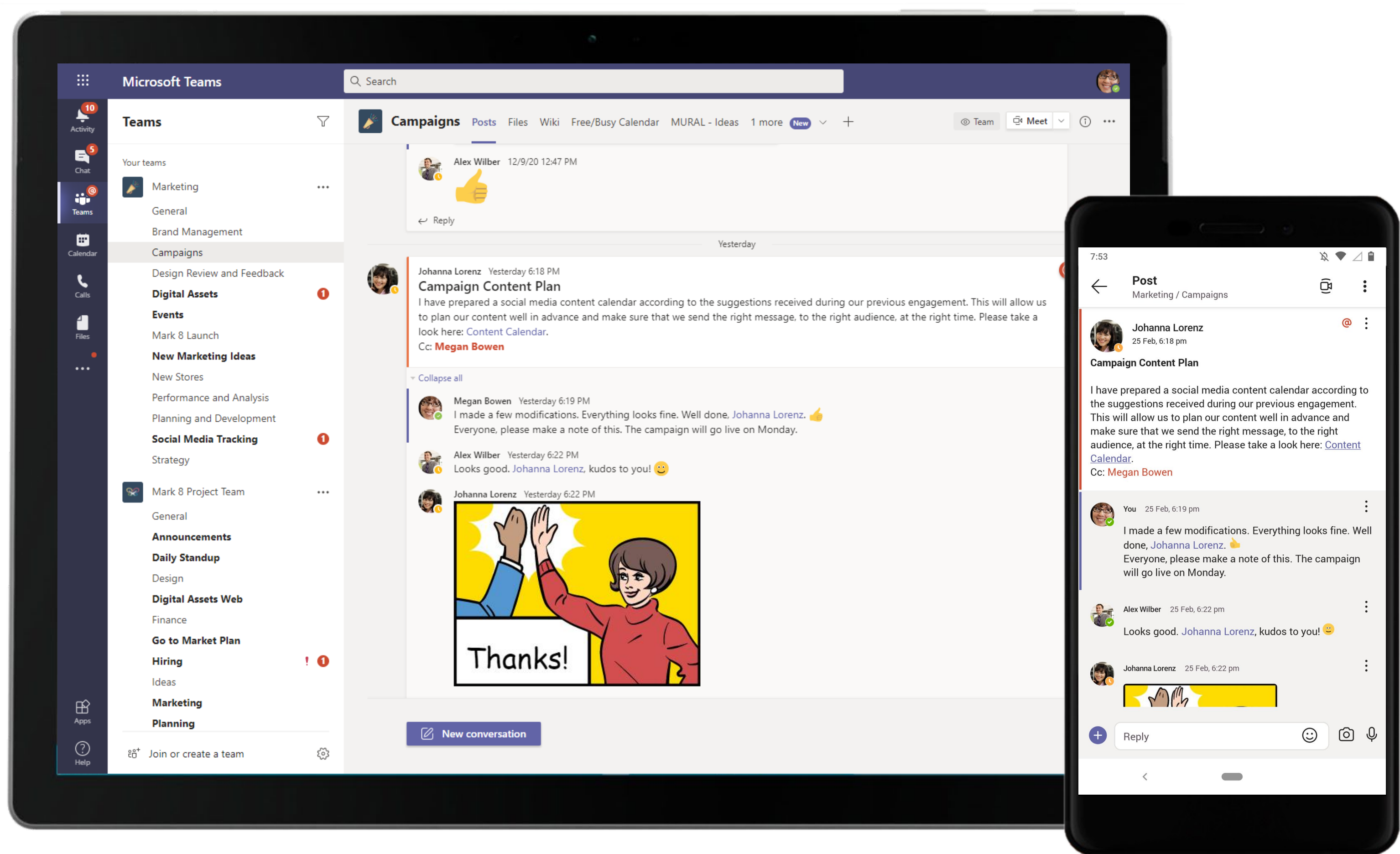
Channel conversations can contain a lot of things– conversations, files shared by team members, meeting threads, and GIFs! Use social features like reacting to team members' conversations and responses to acknowledge them.



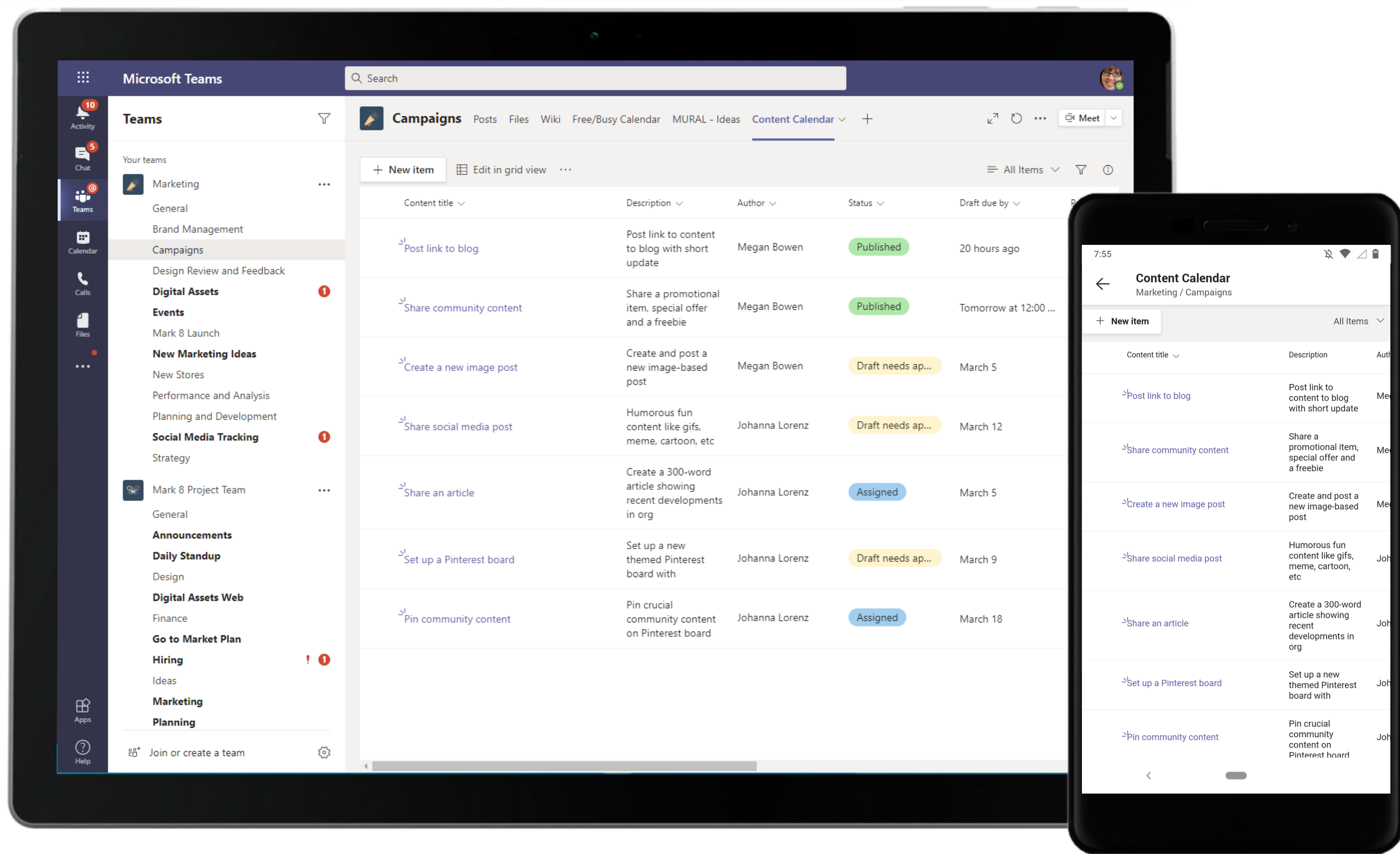
Complete meeting solutions in Teams support screen sharing, recording, video and audio conferencing. Scheduling Assistant feature suggests times that are optimal for all attendees.



Brainstorm, ideate and collaborate on the MURAL app available from the Teams app store in real-time during meetings with your team. Pin the creative output as a tab within the Teams channel for later reference.



Microsoft Teams conversations are threaded so users can reply directly in-context to specific conversations. Intense in moments of work flurry, these channels also see a fair amount of levity with GIFs, stickers and emojis that makes working together fun!



Record data, have conversations about list items, organize process, and track status in an environment built for teamwork and collaboration. The Marketing Manager reviews Content Calendar prepared by Social Media Manager.



# Coordinating Efforts Over New Retail Outlets

## Marketing Manager

### Scenario Walkthrough

Contoso Retail has two new store openings scheduled in Houston and New York. The Marketing team must work together to make the new stores a success considering the COVID-19 restrictions and guidelines. Here's how the Marketing Manager leverages Microsoft Teams' cohesive experience to streamline her work and ensure her team's visibility.

- Sets up a meeting and invites team members to brainstorm and collaborate.
- Uses the OneNote app within Teams to capture meeting notes and feedback without leaving the Teams application.
- Contacts the Finance Manager over Budget Allocation in a 1:1 chat.
- Uses Excel to create marketing plans and shares the spreadsheet with the Finance Manager for review.
- Uses a Workstreams.ai tab integrated in the channel to create, assign, and track tasks necessary to complete the project.
- Pins a YouTube tutorial video on booking shopping slots for sharing with customers.

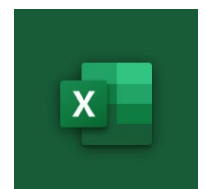
### How did Teams help the Marketing Manager execute her roles and responsibilities?

- Office applications like Excel and OneNote allow quick access to shared information and notes, respectively.
- Workstreams.ai enables team members to stay abreast of tasks assigned to them across teams.
- YouTube enables instant sharing of relevant videos with team members.

### Which app integrations on Teams made it possible?



OneNote



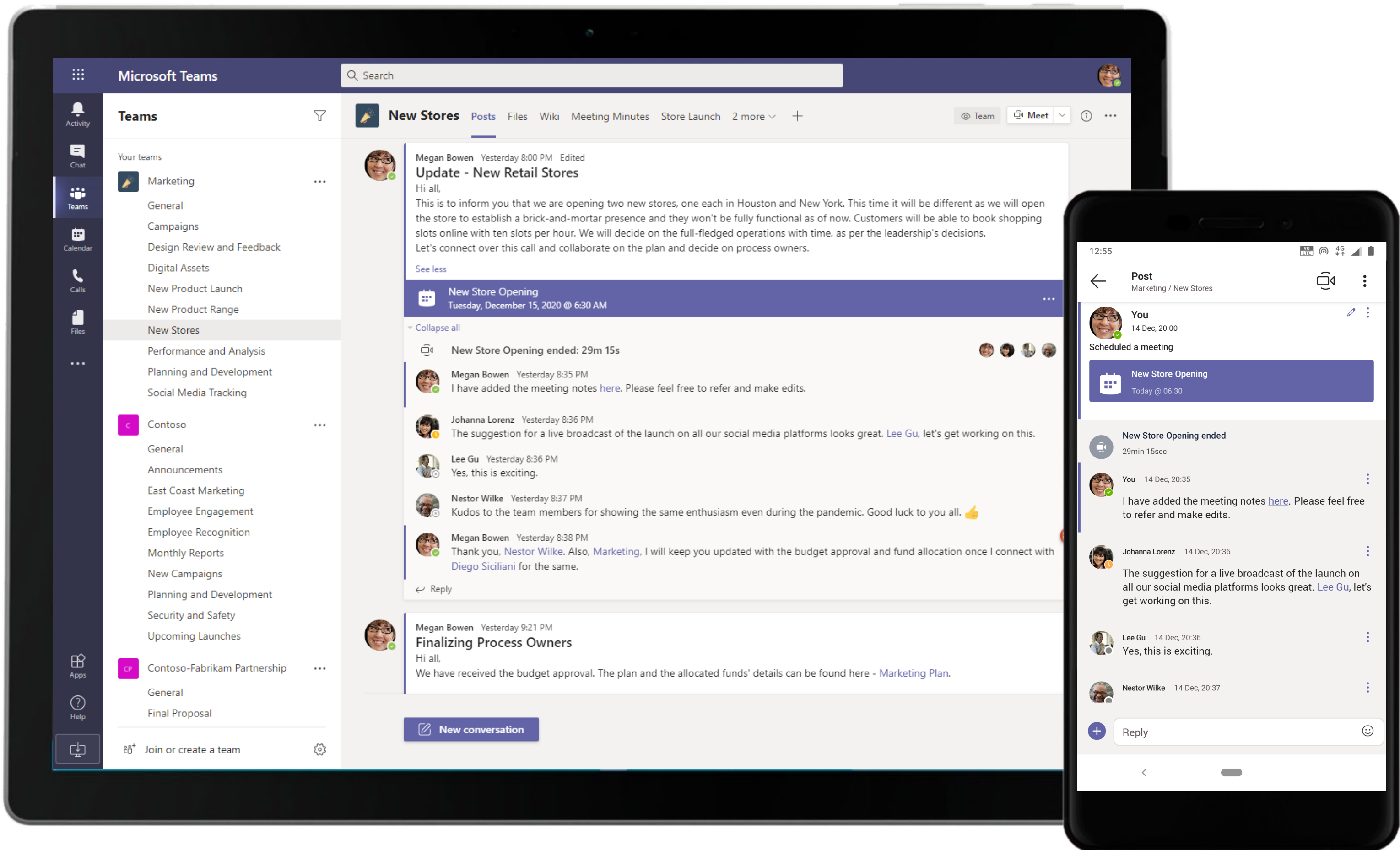
Excel



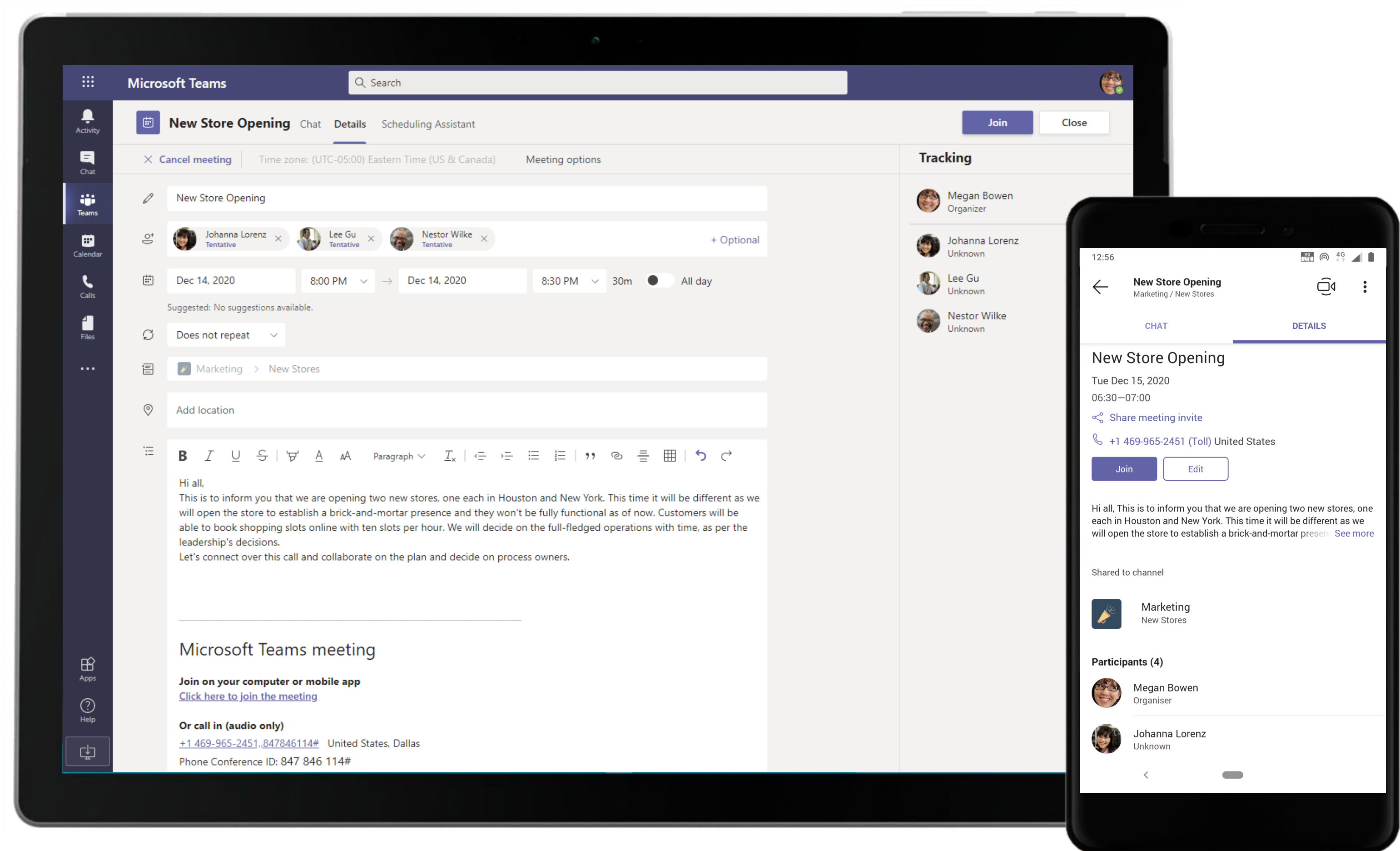
YouTube



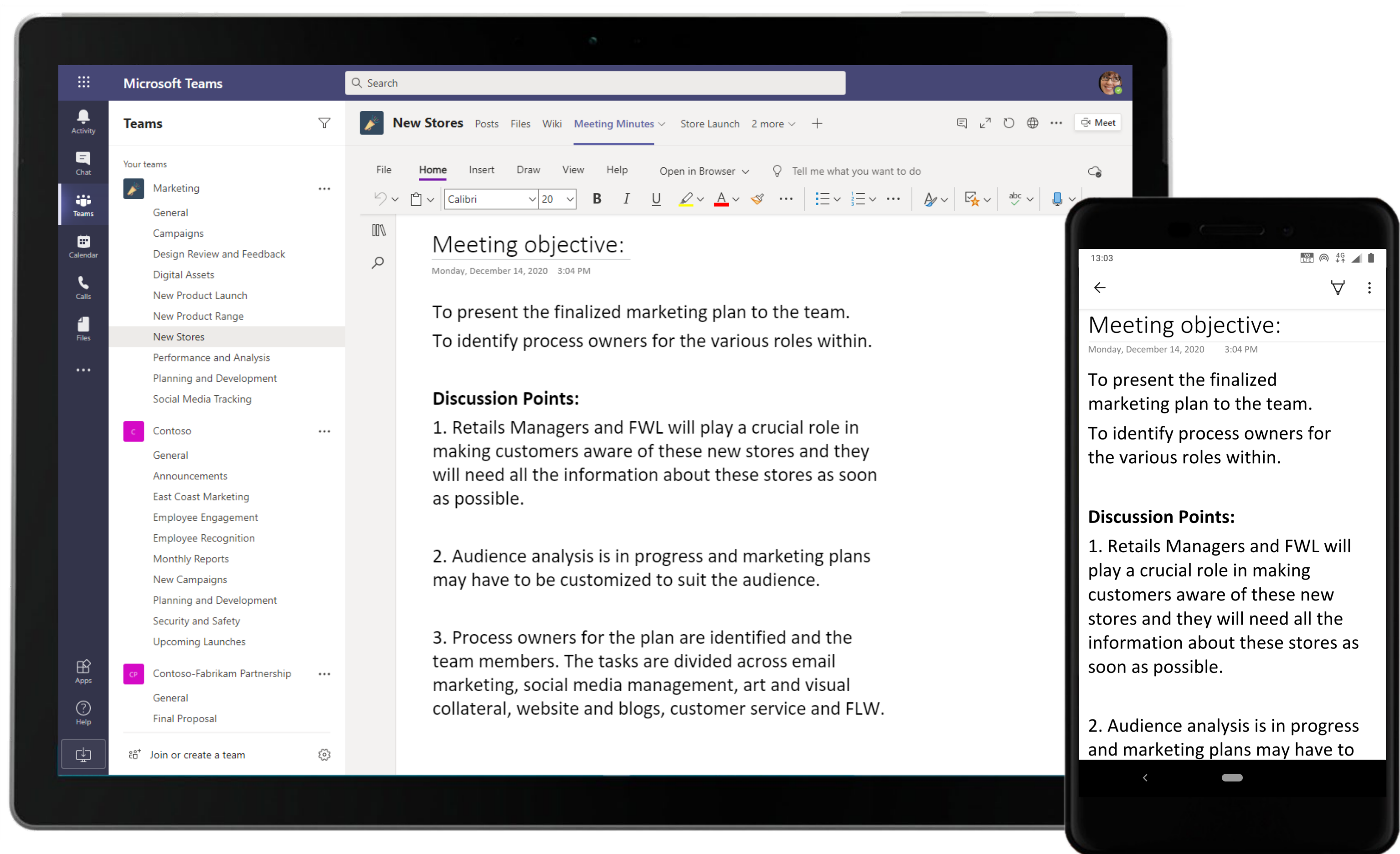
Workstreams.ai



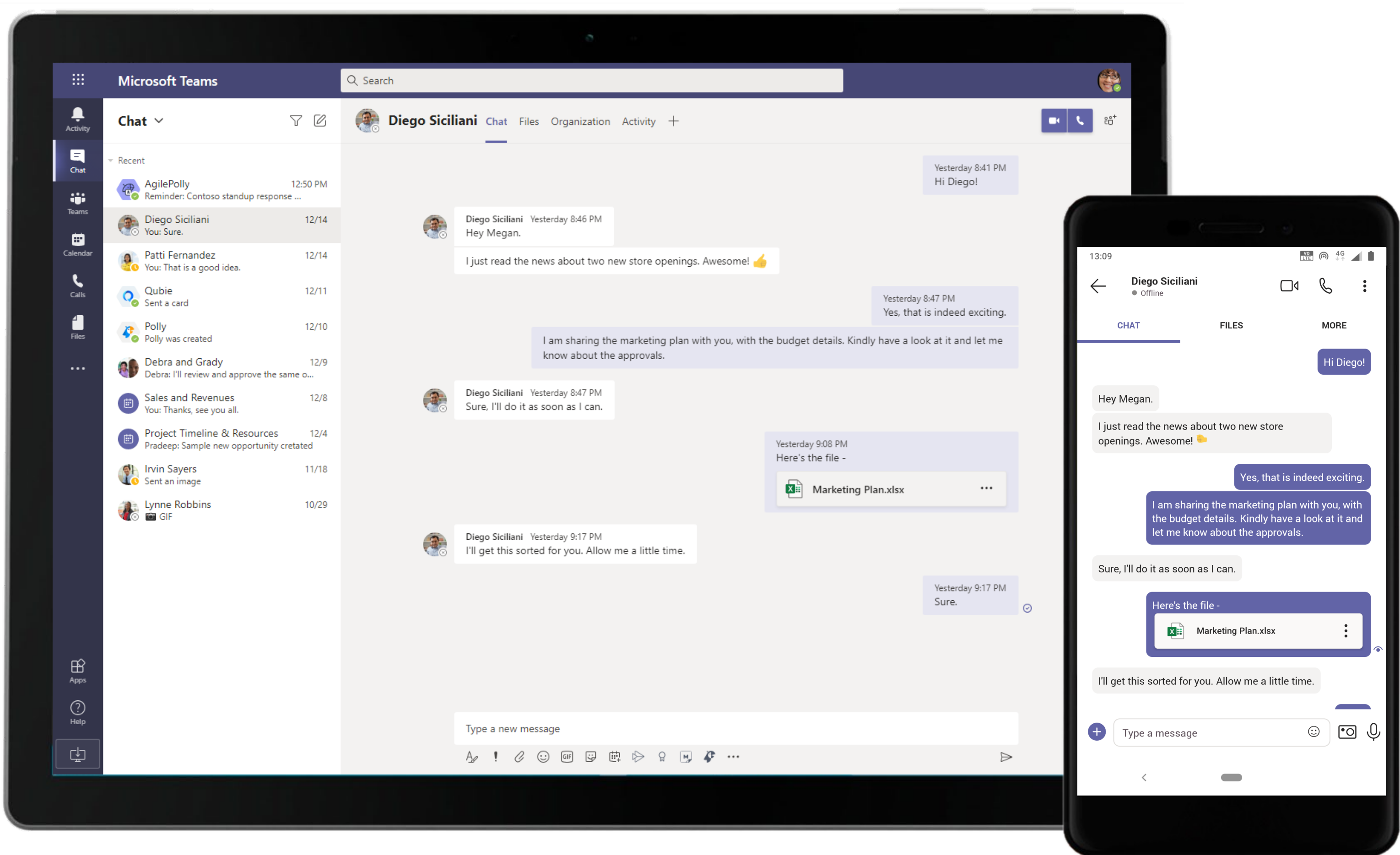
The Marketing Manager posts a message in the channel to provide the team context about the meeting and the objective behind the collaboration.



Complete meeting solutions in Teams support screen sharing, recording, video and audio conferencing. Scheduling Assistant feature suggests times that are optimal for all attendees.



Conversations, action items and relevant documents shared in the meeting thread are accessible right inside Teams. The Marketing Manager spells out the plan and offers discussion points to facilitate structured conversation.

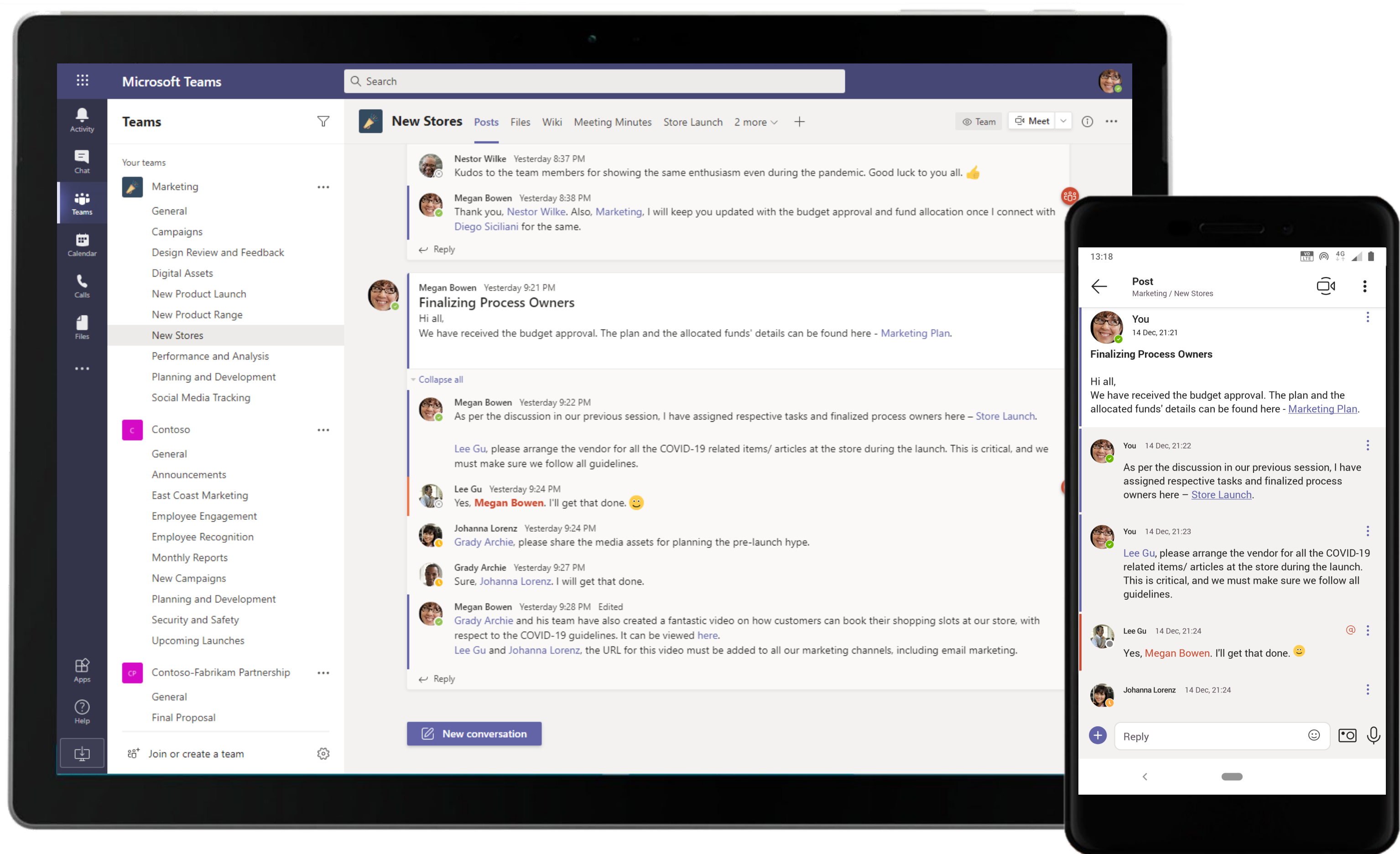


Do your one-on-ones in Teams and share files over chats easily. The Marketing Manager connects with the Finance Manager and shares the budget plan over chat.

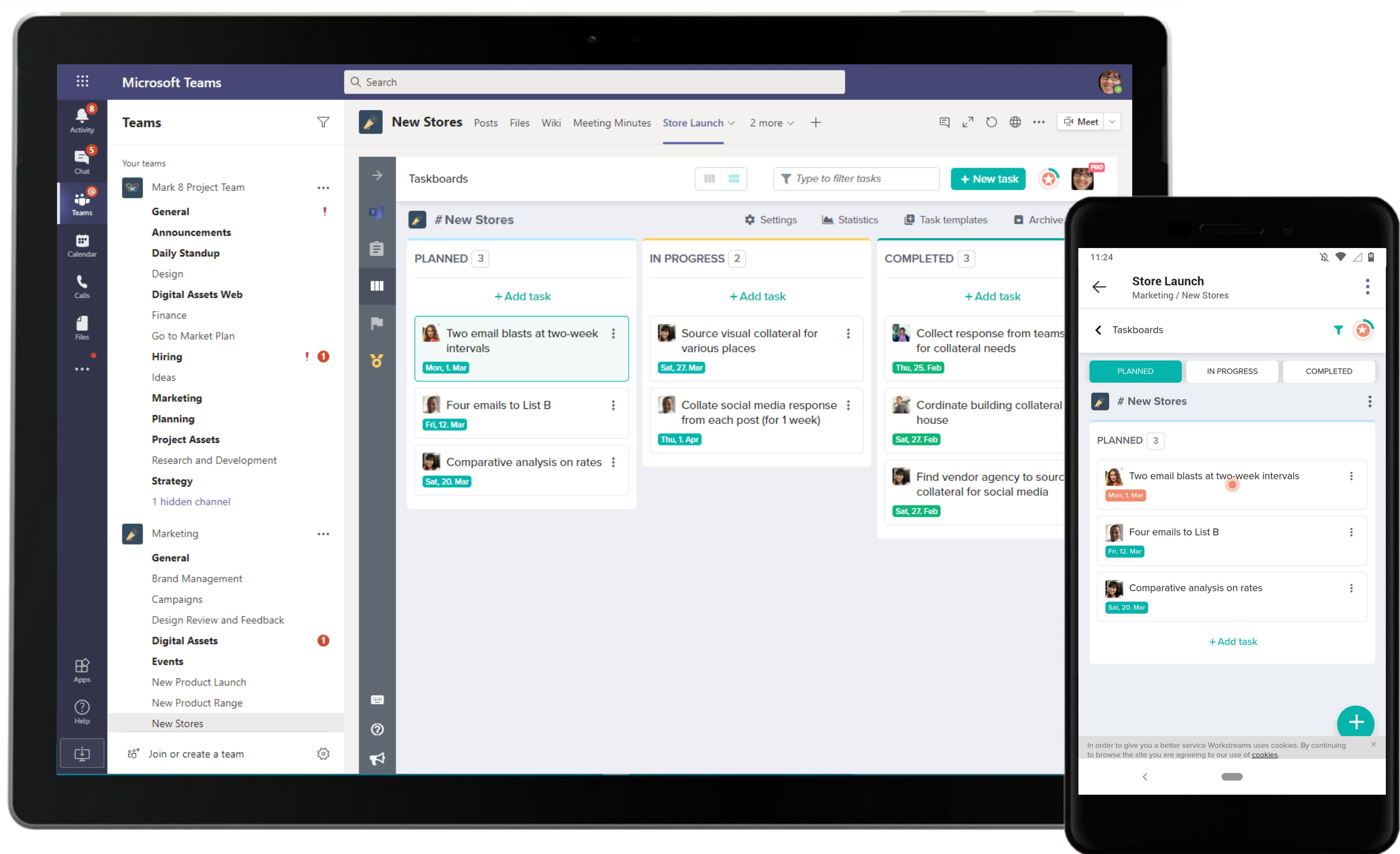
The image shows a tablet and a smartphone displaying the Microsoft Excel 'Marketing Plan.xlsx' spreadsheet. The tablet screen shows the full spreadsheet with columns for 'WHAT TO DO', 'BUDGET', 'START DATE', 'END DATE', and 'COMMENTS'. The smartphone screen shows a zoomed-in view of the same spreadsheet, highlighting the 'WHAT TO DO' column.

WHAT TO DO	BUDGET	START DATE	END DATE	COMMENTS
<b>Executive Summary</b>				
Objectives of the Plan	\$ xxx,xxx,xx	15/12/2020	1/1/2021	New geography
Challenges of the organization				Increase in adoption
Expectations if the marketing plan was successful				To extend to new m
<b>Target Market - New York</b>				
Demographics				87000 population
Average daily store visits/ footfall				
<b>Target Market - Houston</b>				
Demographics				
Average daily store visits/ footfall				
<b>Marketing Strategy</b>				
Promotions	\$ xxx,xx			Digital Traditional M
Expansion				3-phase expansion s
Current marketing efforts				

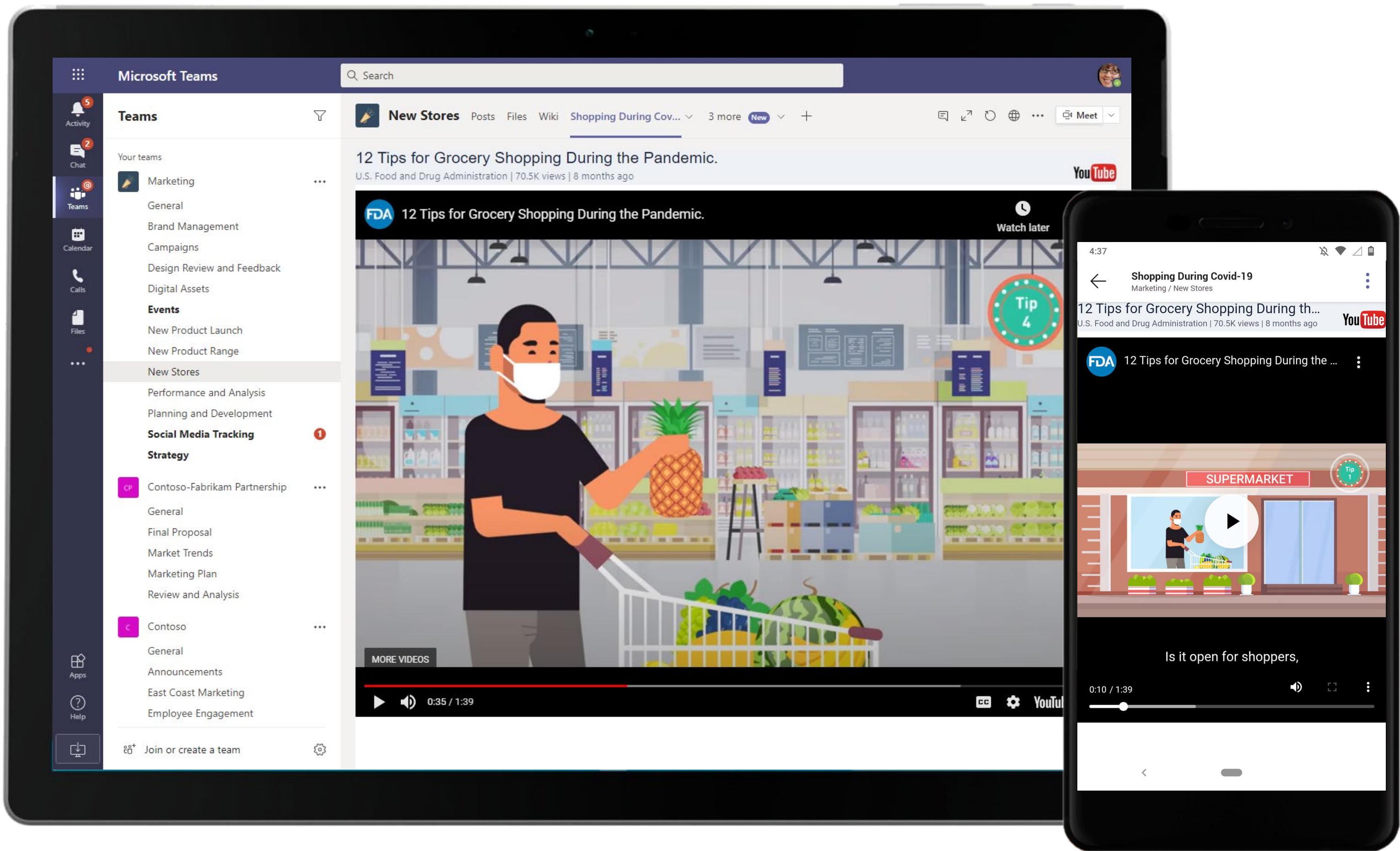
The Marketing Manager uses Excel in Teams to create a budget breakdown and then shares it over a chat with the Finance Manager.



Microsoft Teams conversations are threaded so users can reply directly in-context to specific conversations, keeping relevant chats grouped together. @mention relevant team members to make sure you grab their attention in real-time.



The Marketing Manager assigns and tracks tasks with a Workstreams.ai tab in the channel. This provides complete clarity for the team members regarding the tasks they need to pick up and close out.



Share a YouTube video with other members of the channel. Simply search for the video you want or paste its URL in your Teams channel. The Marketing Manager shares a video on how to book slots in the channel.



# Leverage Rich Visuals to Make your Work Shine

## Brand Strategist

### Scenario Walkthrough

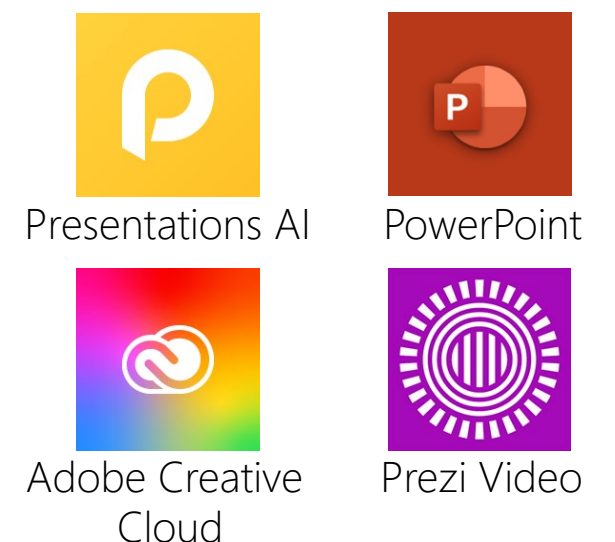
Presenting ideas, campaigns, and initiatives are part of routine work in the Marketing team and preparing presentations can take a lot of time. You need an easier way to compile existing content and create professional-looking presentations by following the brand guidelines. See how the Brand Strategist uses a combination of tools within the Microsoft Teams platform to help the Marketing team create and share content with ease.

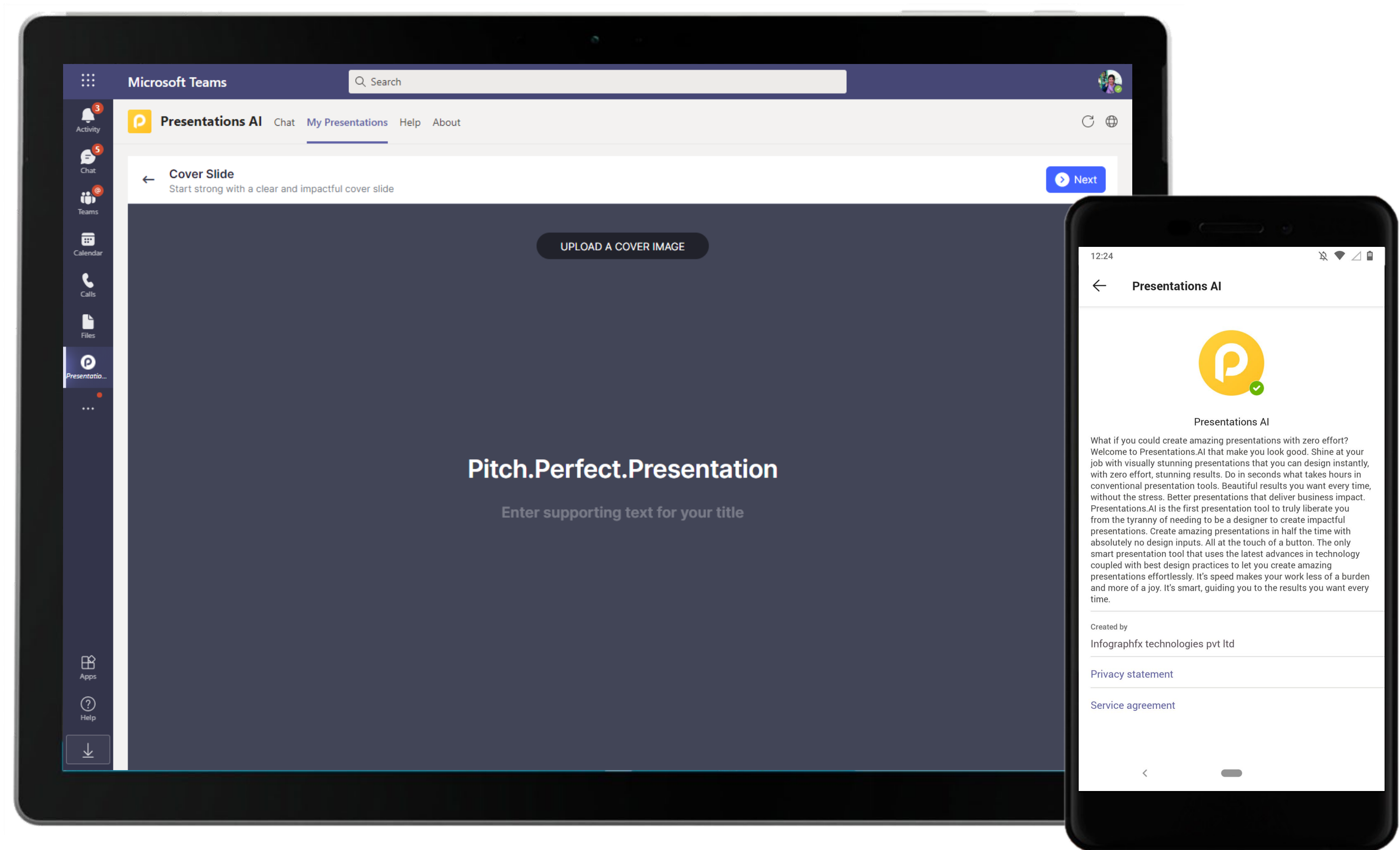
- Creates a presentation with tips and tricks on making better presentations via Presentations AI and pins it as a channel tab.
- Invites all the team members for a meeting on brand presentations and shares the templates via PowerPoint.
- Configures a channel tab with the new redesigned company logo via Adobe Creative Cloud
- Creates a video on improving the marketing feedback cycle and shares it within a channel using Prezi video.

### How did Teams help the Marketing Manager execute her roles and responsibilities?

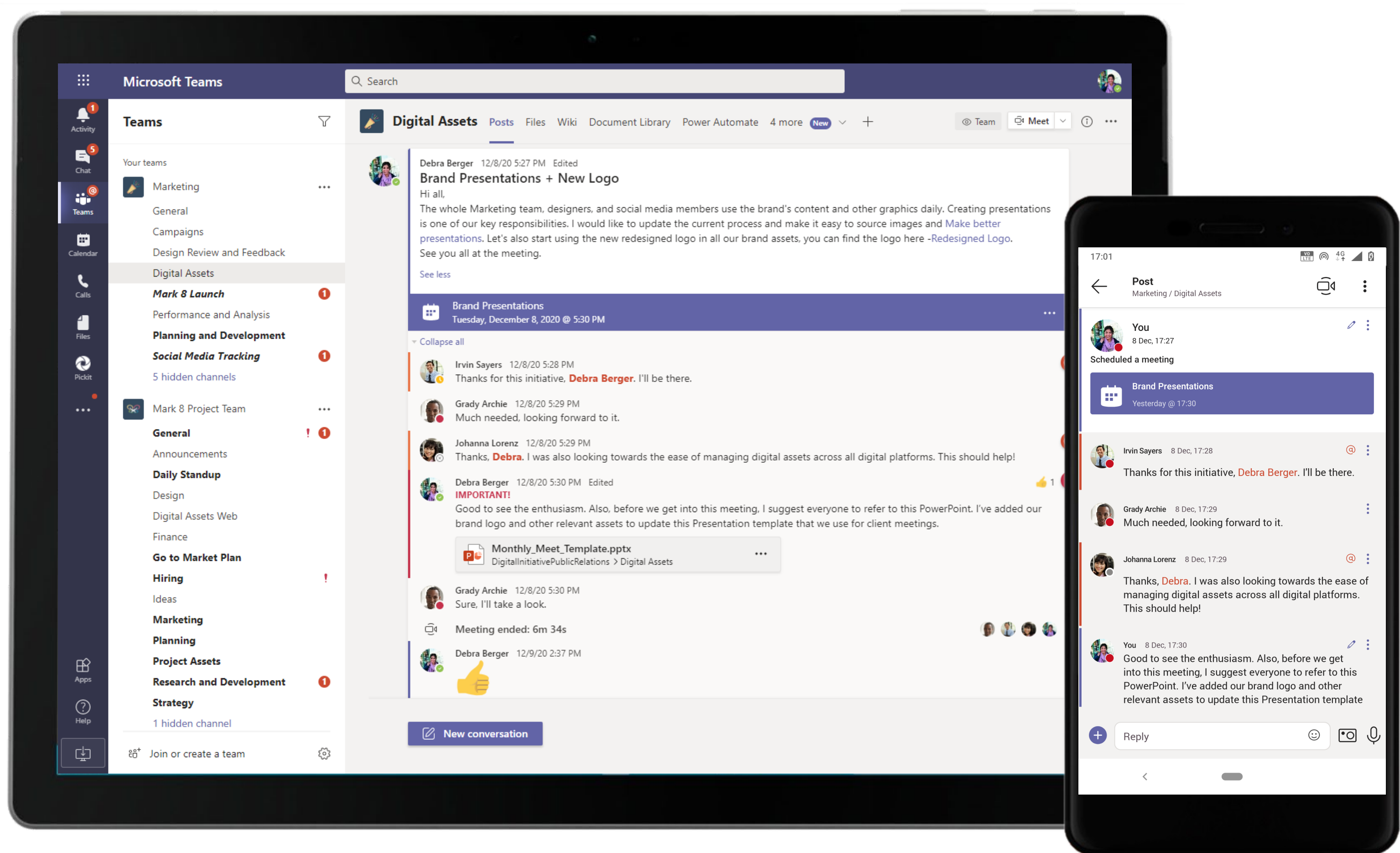
- Utilize PowerPoint to draft and present an effective and easily consumable presentation for the team.
- Create and design your presentations instantly with zero effort with Presentations AI.
- Find, view, and share Adobe Creative Cloud assets quickly within Microsoft Teams.
- Prezi video makes it easy to create and share video updates with team members.

### Which app integrations on Teams made it possible?

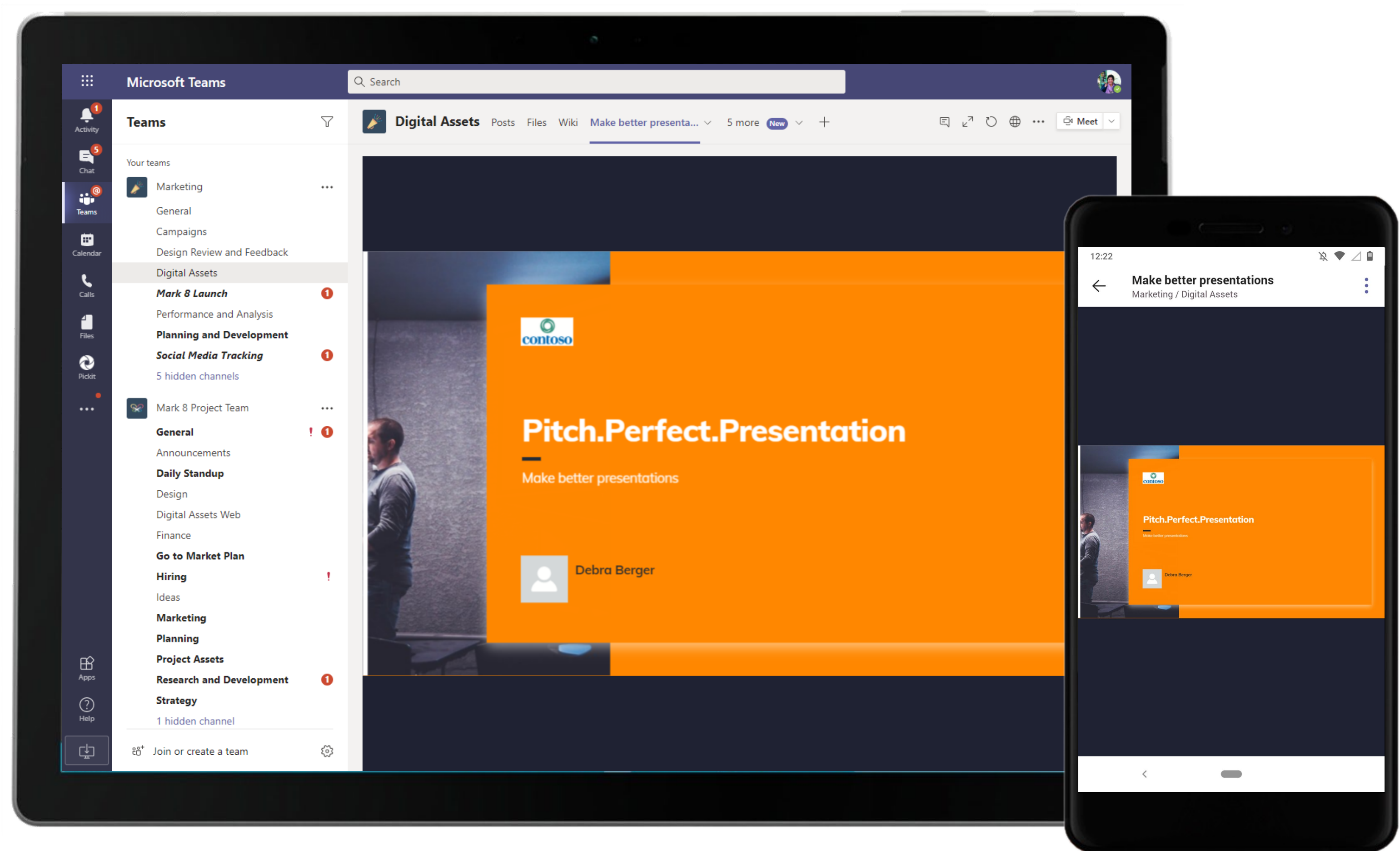




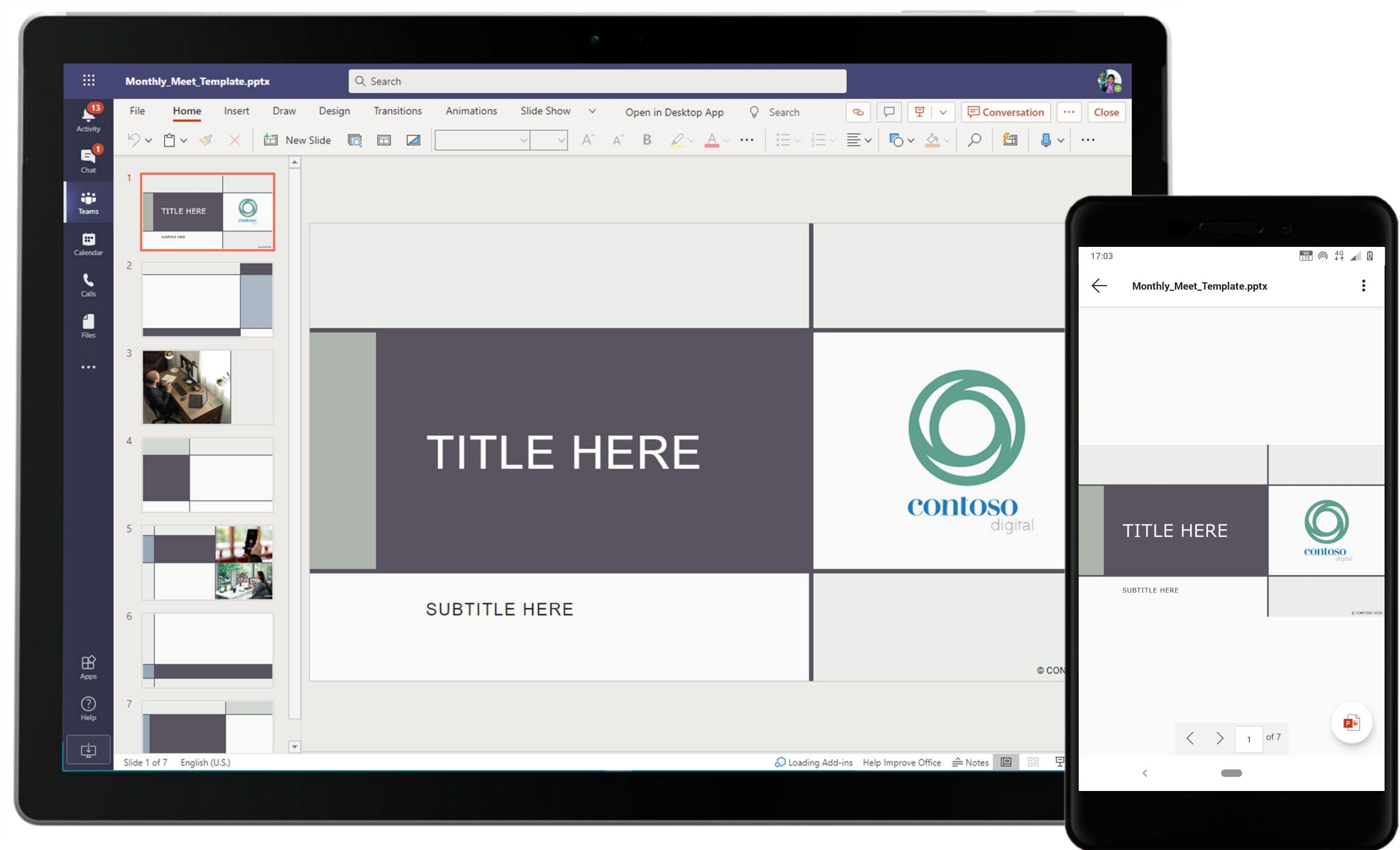
Leverage smart tools to create visually engaging presentations instantly with Presentations AI. Here the Brand Strategist creates a presentation that she later shares with the team.



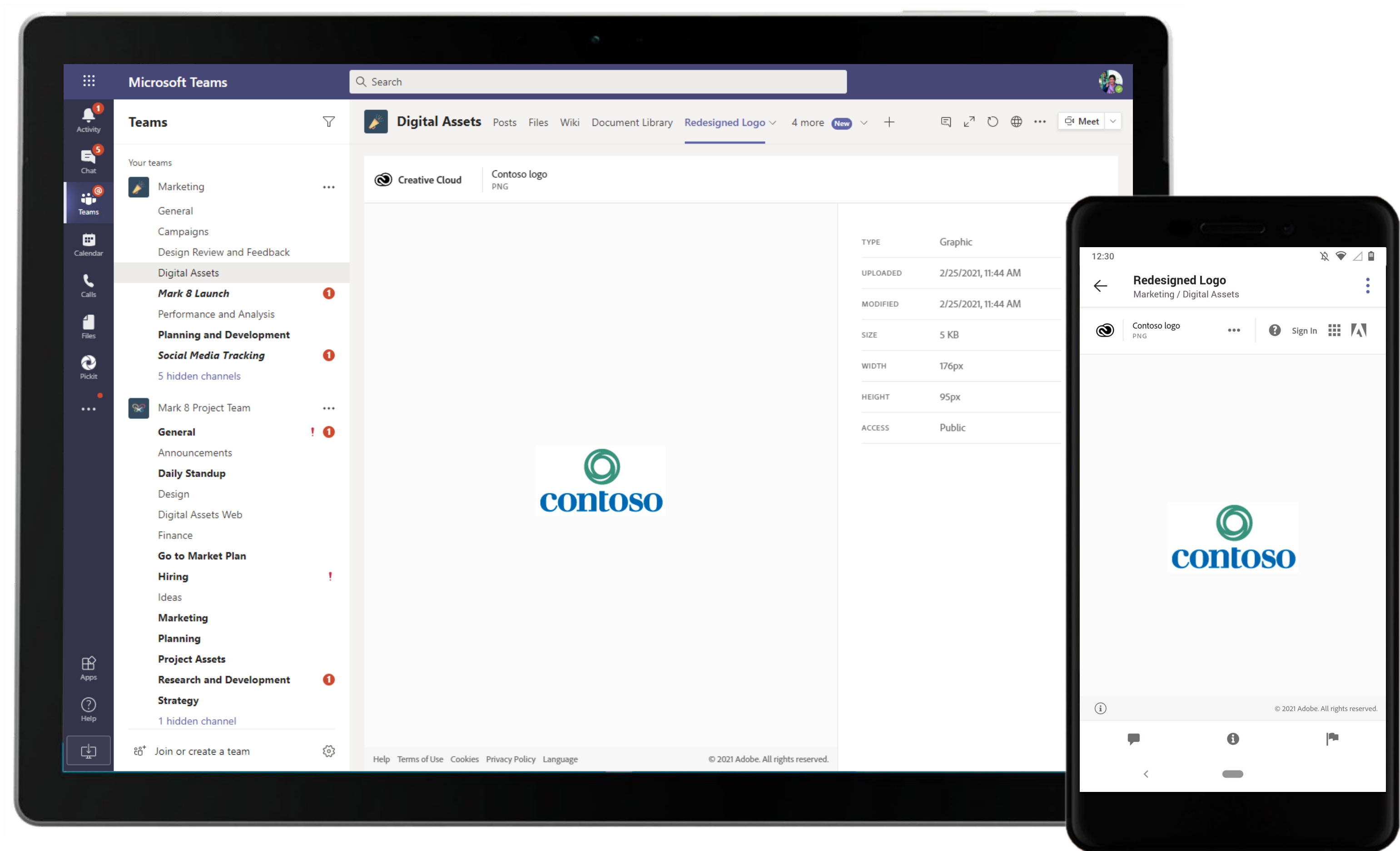
Microsoft Teams conversations are threaded so users can reply directly in-context to specific conversations, while keeping relevant discussions and files grouped together.



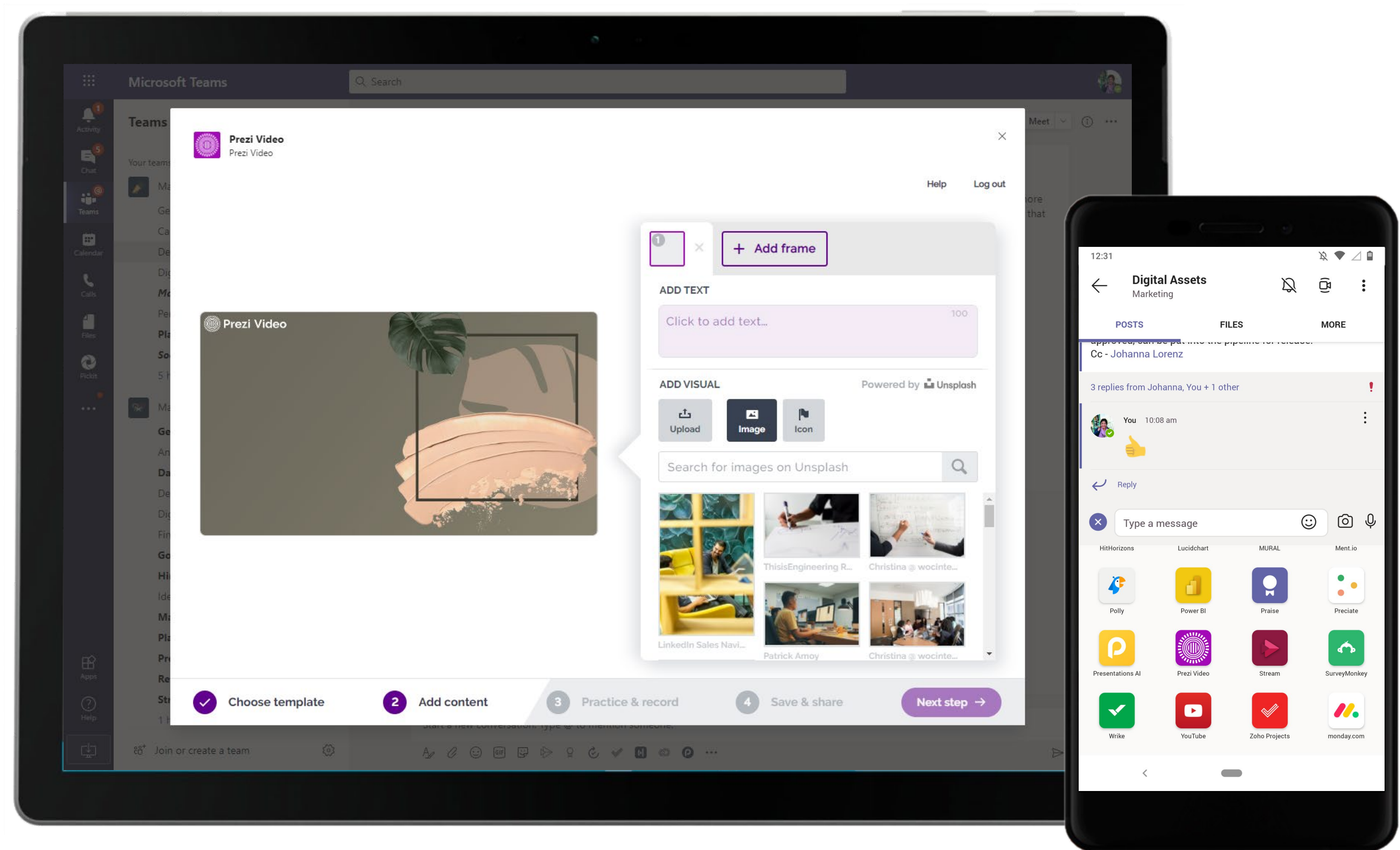
Presentations AI enables you to seamlessly share interactive presentations with your team for easy access right within a Teams channel.



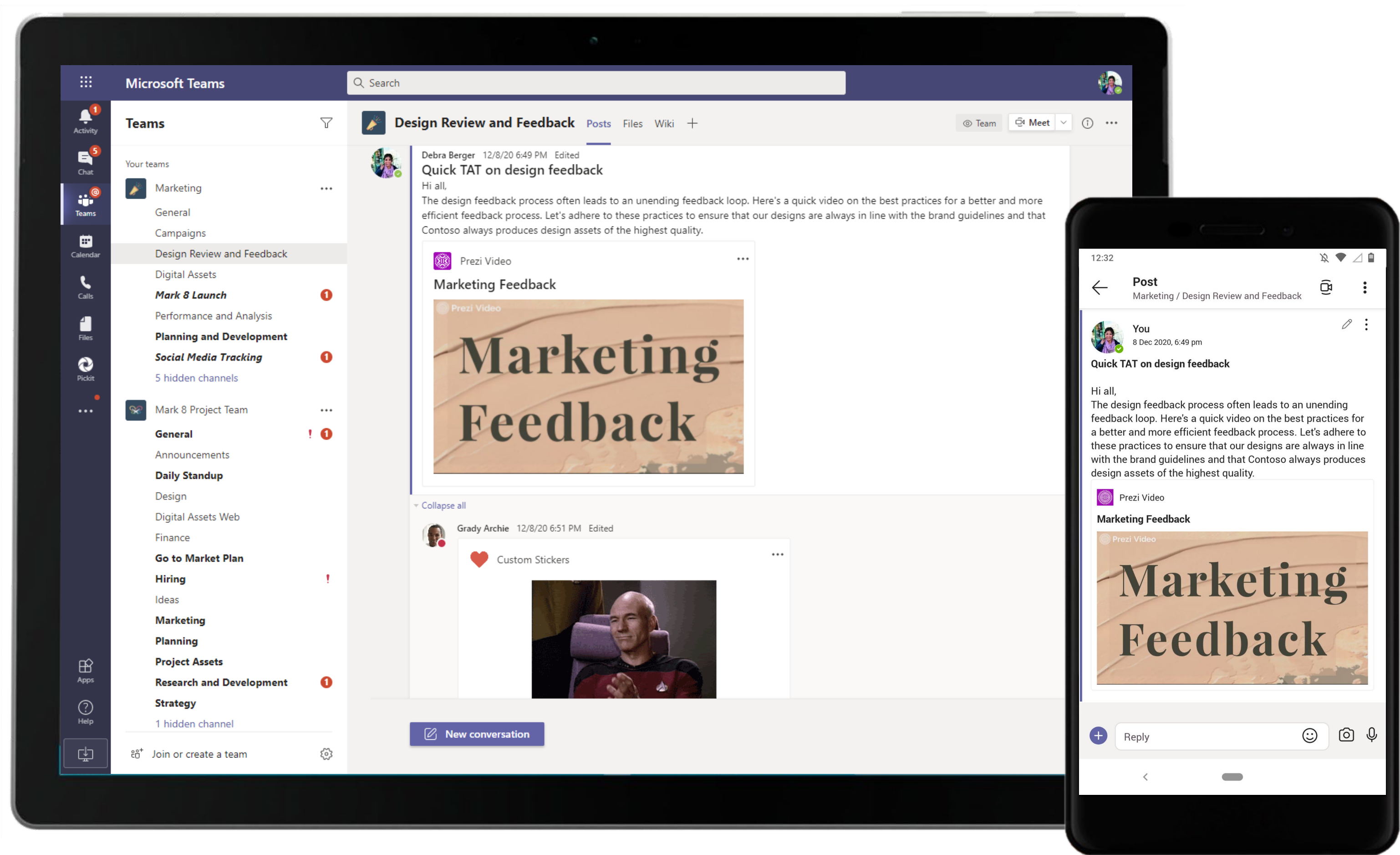
Utilize PowerPoint to draft and present an effective and easily consumable presentation for the team. The Brand Strategist shares a PowerPoint template with the team.



Share and collaborate over creative assets within a channel using Adobe Creative Cloud. The Brand Strategist shares the redesigned brand logo within a channel.



Prezi Video allows you to create and record videos with rich audio and video content. Creators can leverage a vast library of images and templates to make their videos more engaging.



Make your channel conversations more engaging with videos, GIFs, stickers and more. The Brand Strategist shares a video using Prezi Video and views a custom sticker shared within the channel.



# Streamline Approval Processes with Real-Time Teamwork

## Graphic Designer

### Scenario Walkthrough

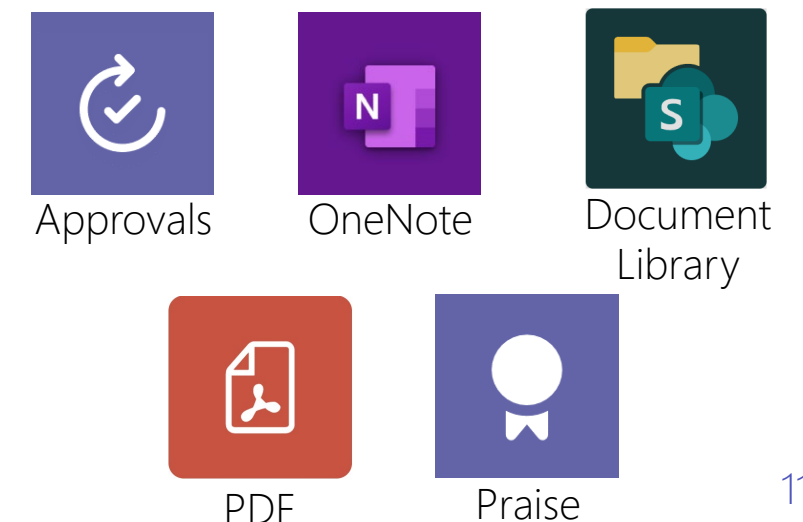
Reviewing and approving marketing content can be a lengthy process. It takes time away from innovating and executing campaigns. Automation of approval actions and notices can speed up the process and reduce redundant work and tracking needs. See how the Graphic Designer combines a set of apps within Microsoft Teams to get speedy approvals with ease. Attends a channel meeting with the regional marketing team members to discuss the task at hand.

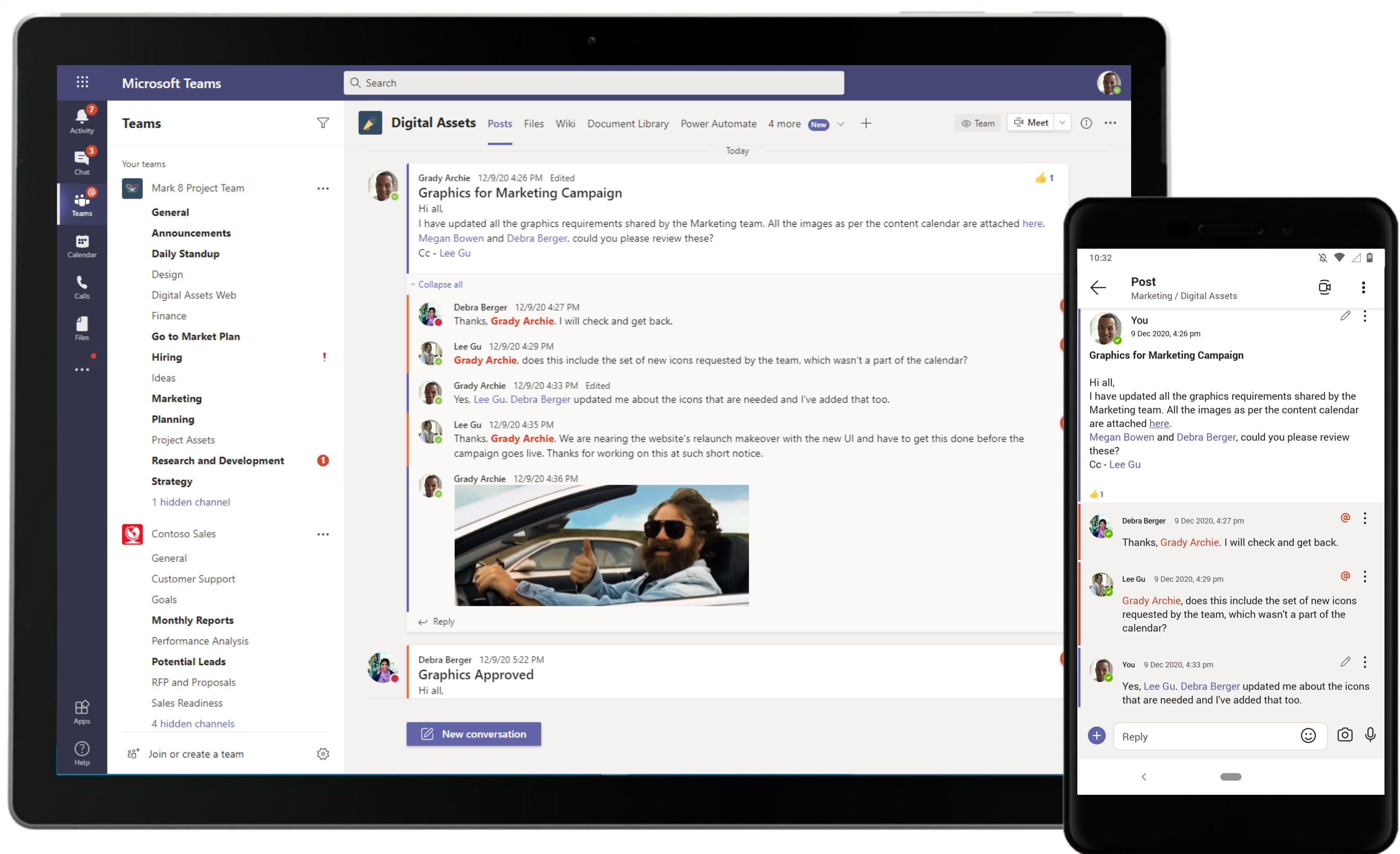
- Shares assets for the marketing campaign within a Document Library and updates the team via channel communications.
- Gets added to a chat group and discusses feedback on the icons over a group call.
- Notes down the suggestions and feedback using OneNote.
- Sends the updated designs for approval using the native Approvals app.
- Receives praise for his work and quick TAT on the closure of the feedback.

### How did Microsoft Teams help the Graphic Designer execute his roles and responsibilities?

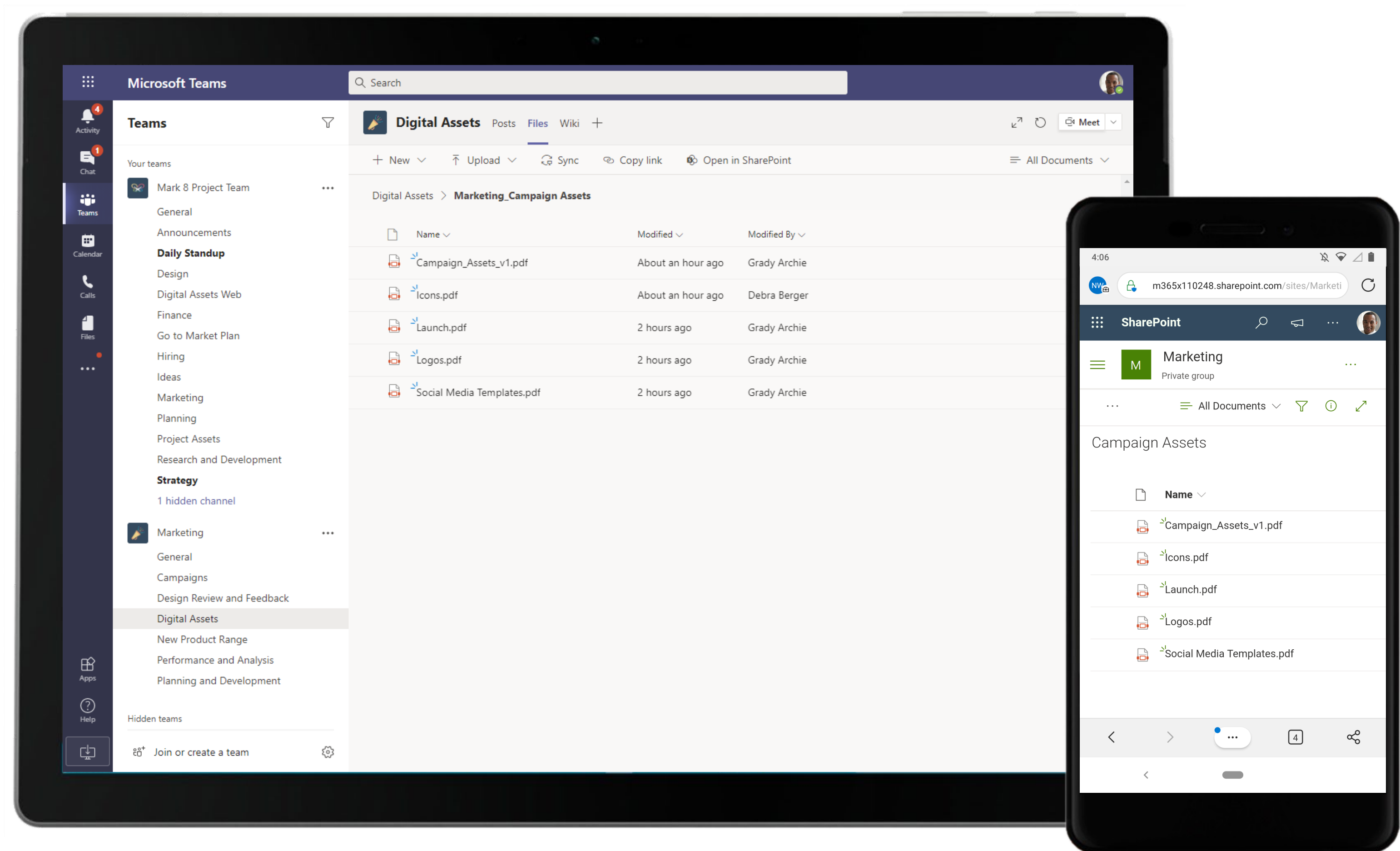
- Share a library of documents with your team across channels with Document Library.
- Integrated Office applications like OneNote enable note taking and sharing seamless within Teams.
- Praise allows public appreciation of high performing team members inside Teams.
- Send, receive, manage, and share approvals in Microsoft Teams

### Which app integrations on Teams made it possible?

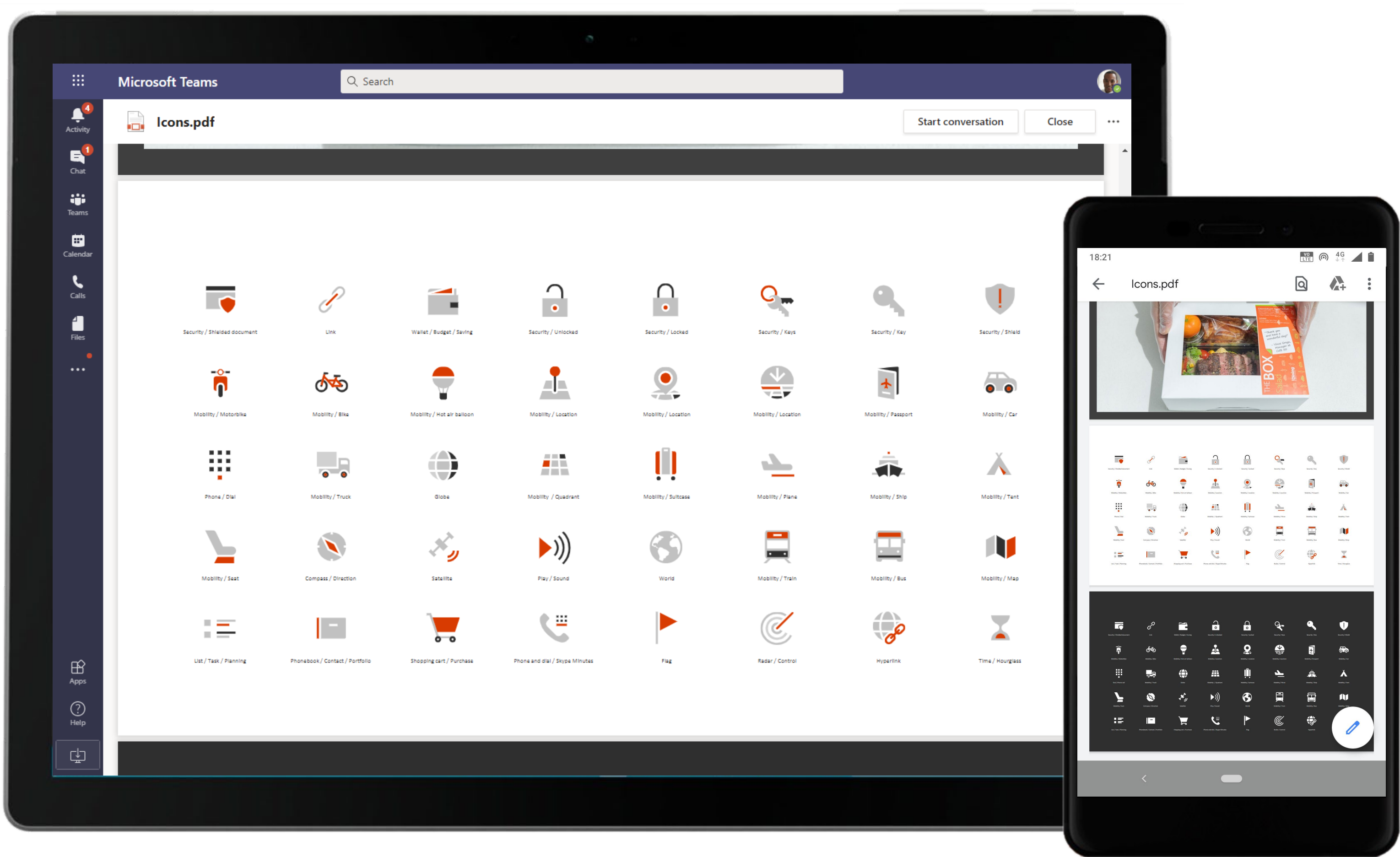




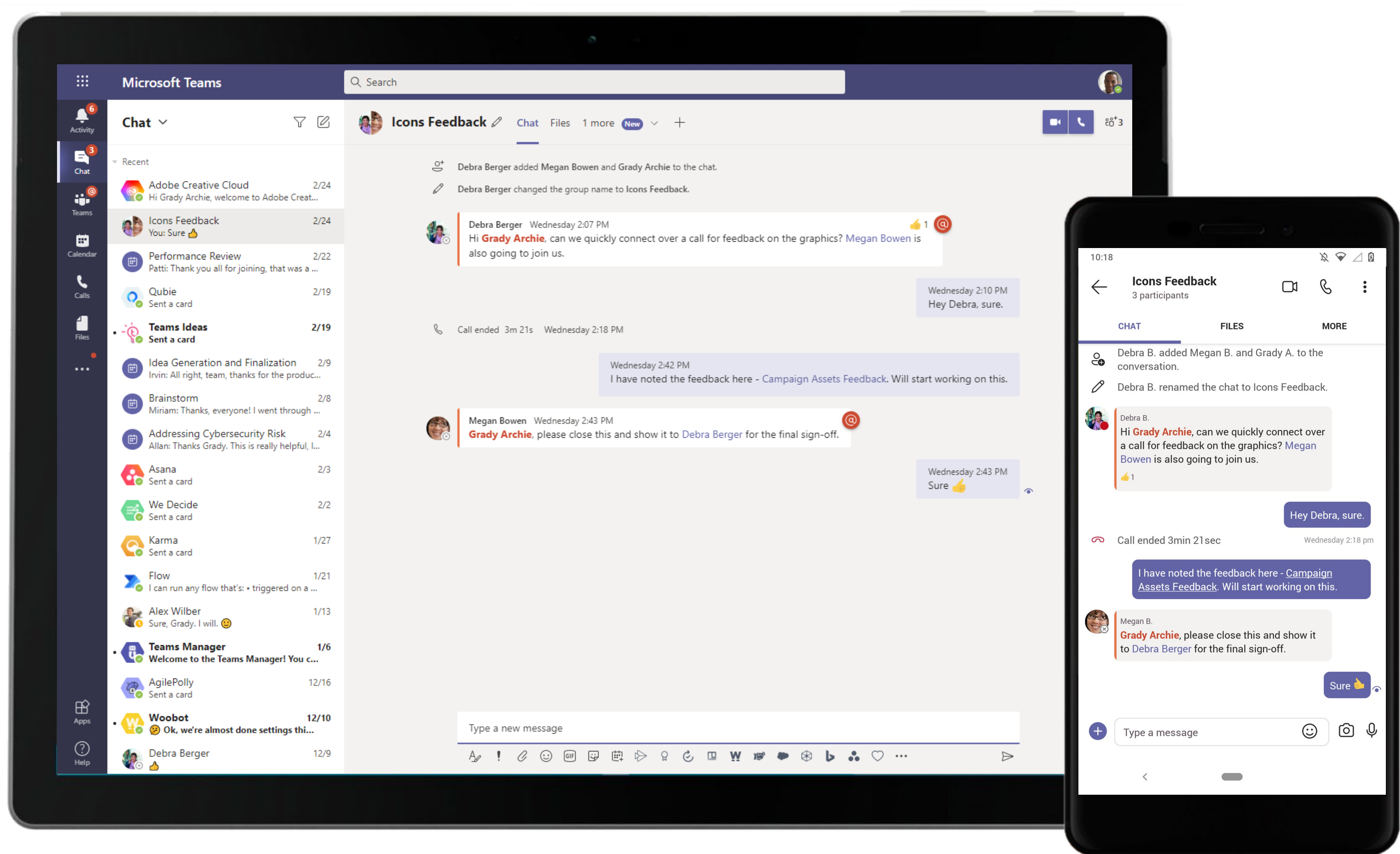
Microsoft Teams conversations are threaded so users can reply directly in-context to specific conversations, keeping relevant chats grouped together. @mention relevant team members to make sure you grab their attention in real-time.



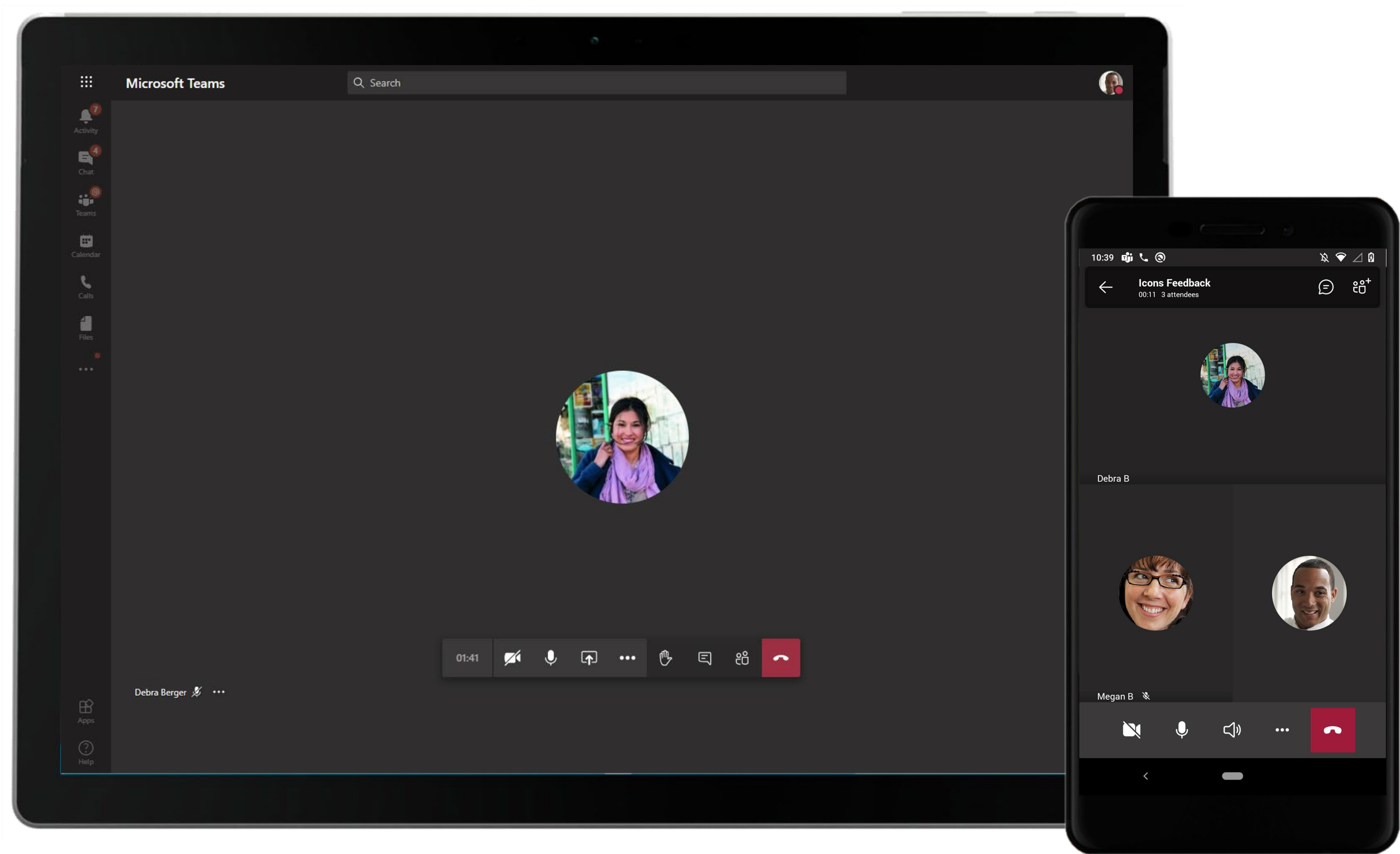
The Graphic Designer shares campaign docs with the team triggering using a SharePoint Document Library.



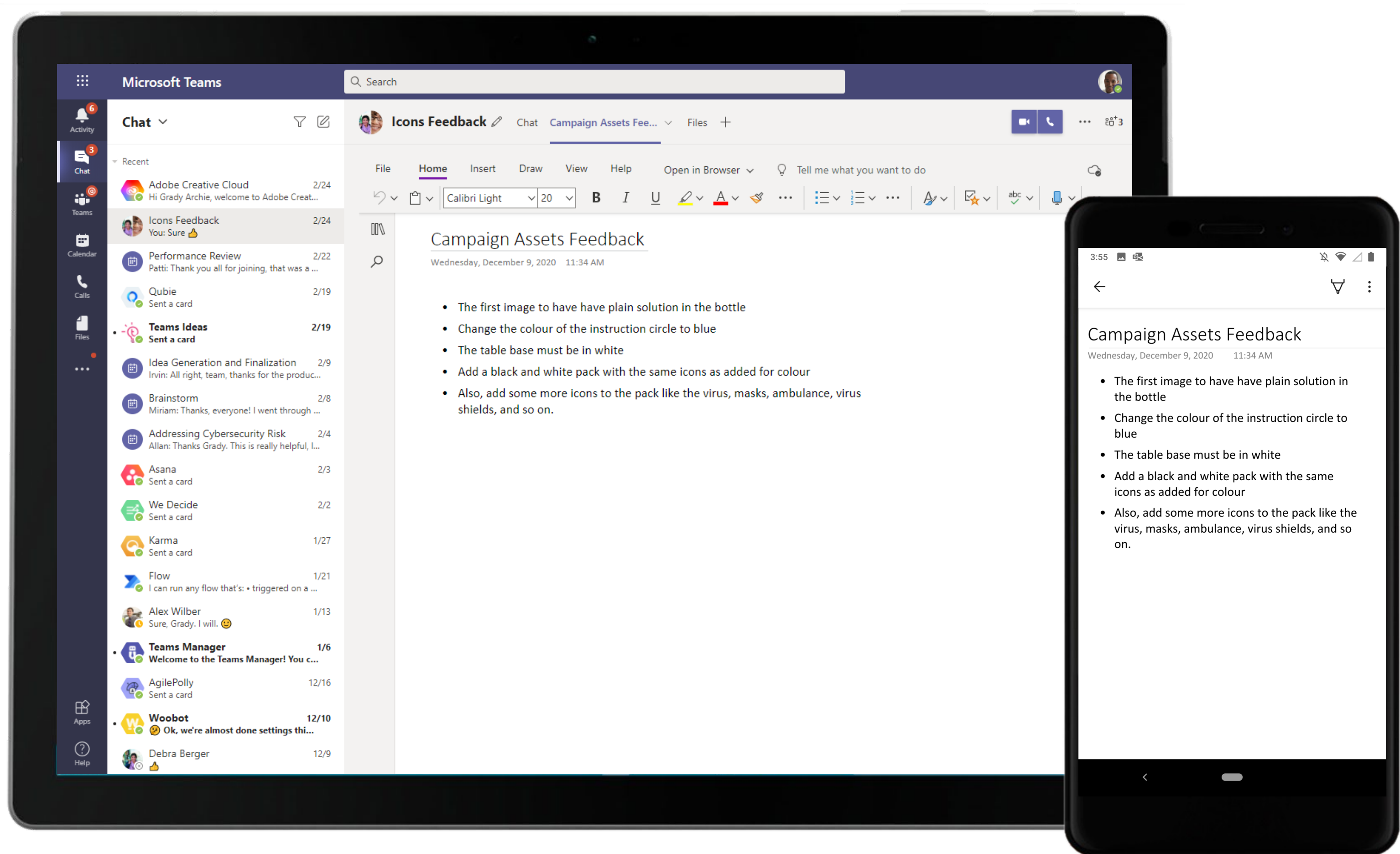
Share PDFs with rich visuals with team members in a channel for easy access. The Graphic Designer views and discusses the PDF with updated campaign assets.



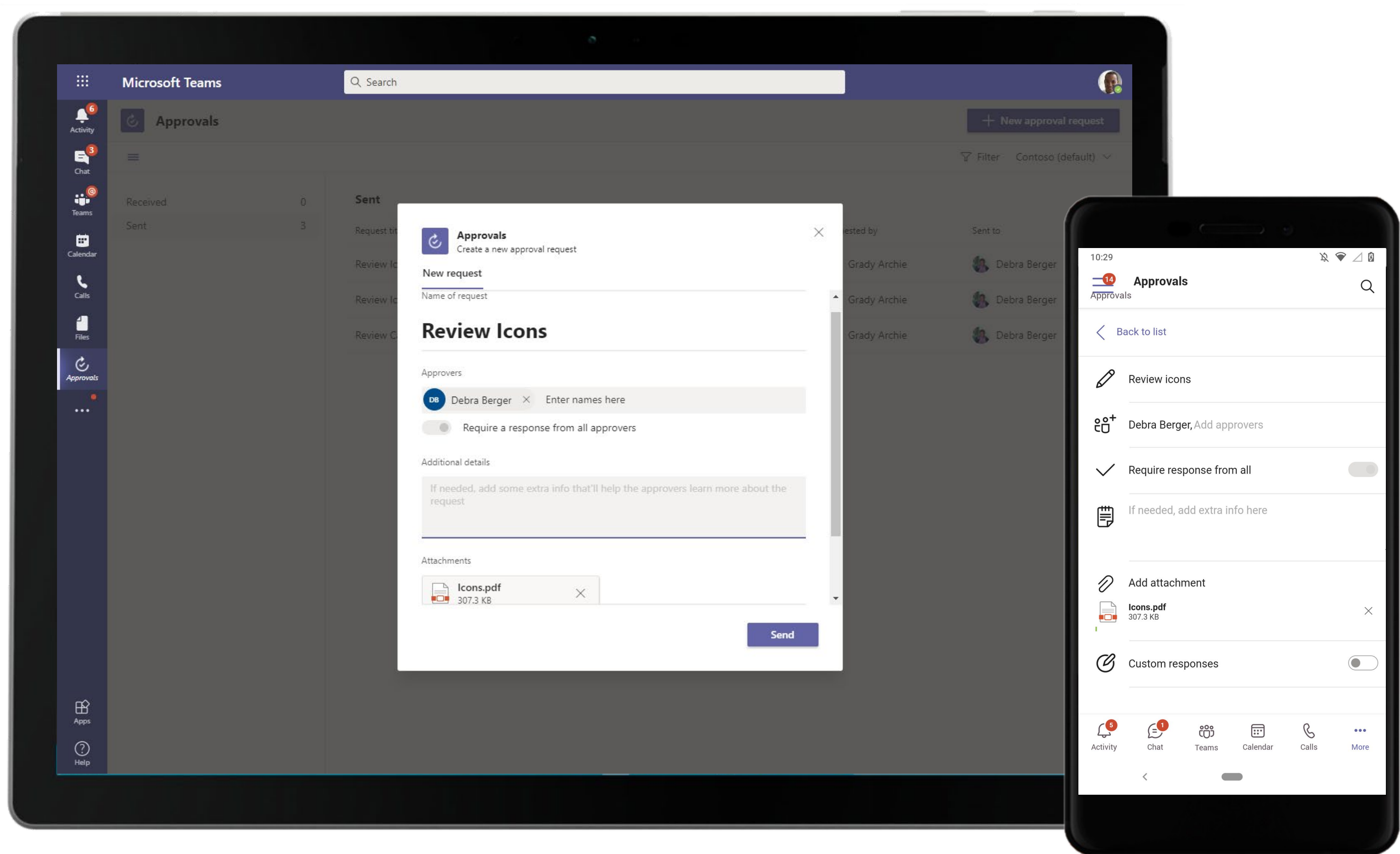
Quickly reach out to and chat with co-workers. Take conversations offline from channels for 1:1 discussions. The Graphic Designer receives feedback on the icons from the Brand Strategist.



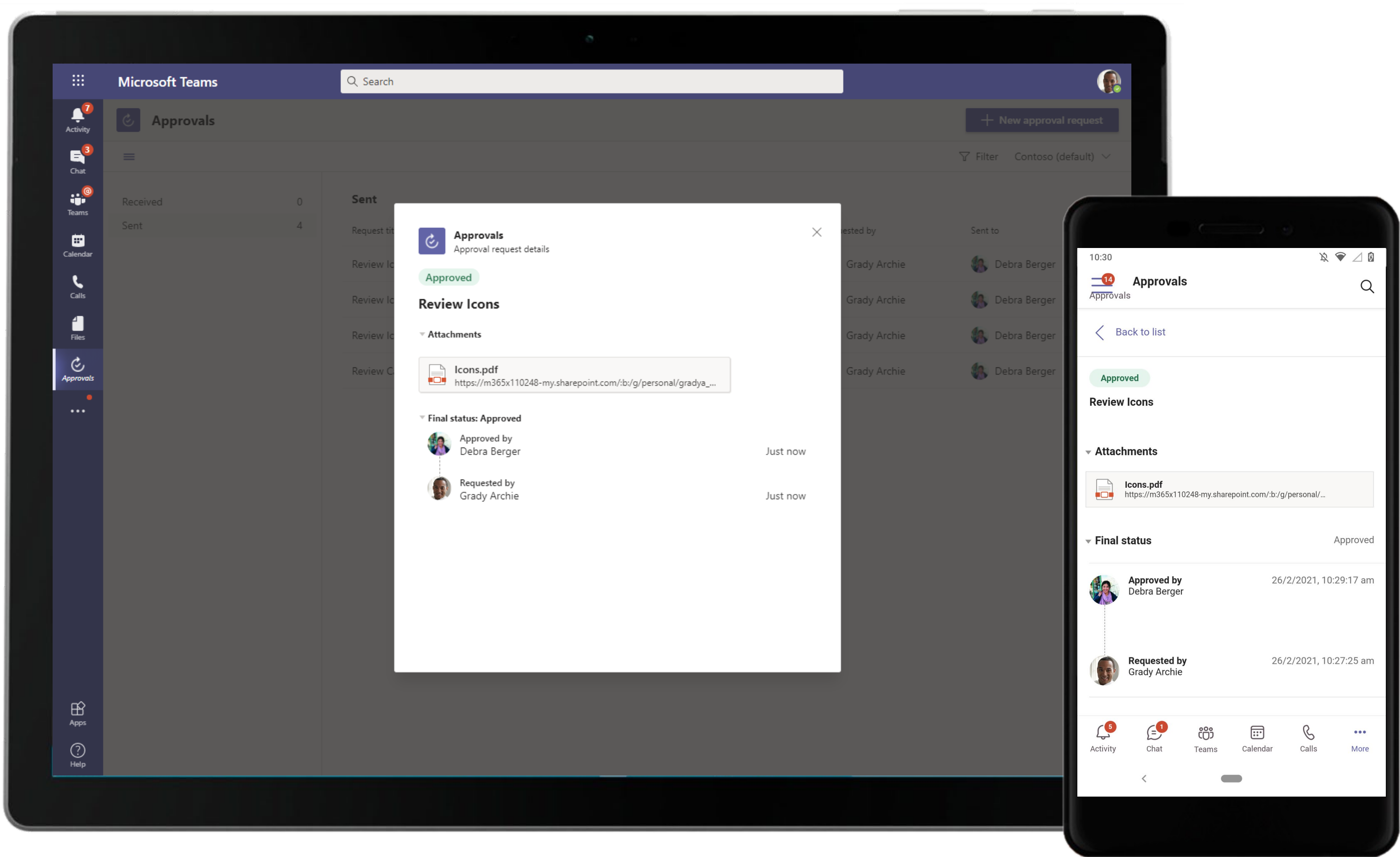
Complete meeting solutions in Teams support screen sharing, recording, video and audio conferencing. Hold calls in Teams with enterprise grade security.



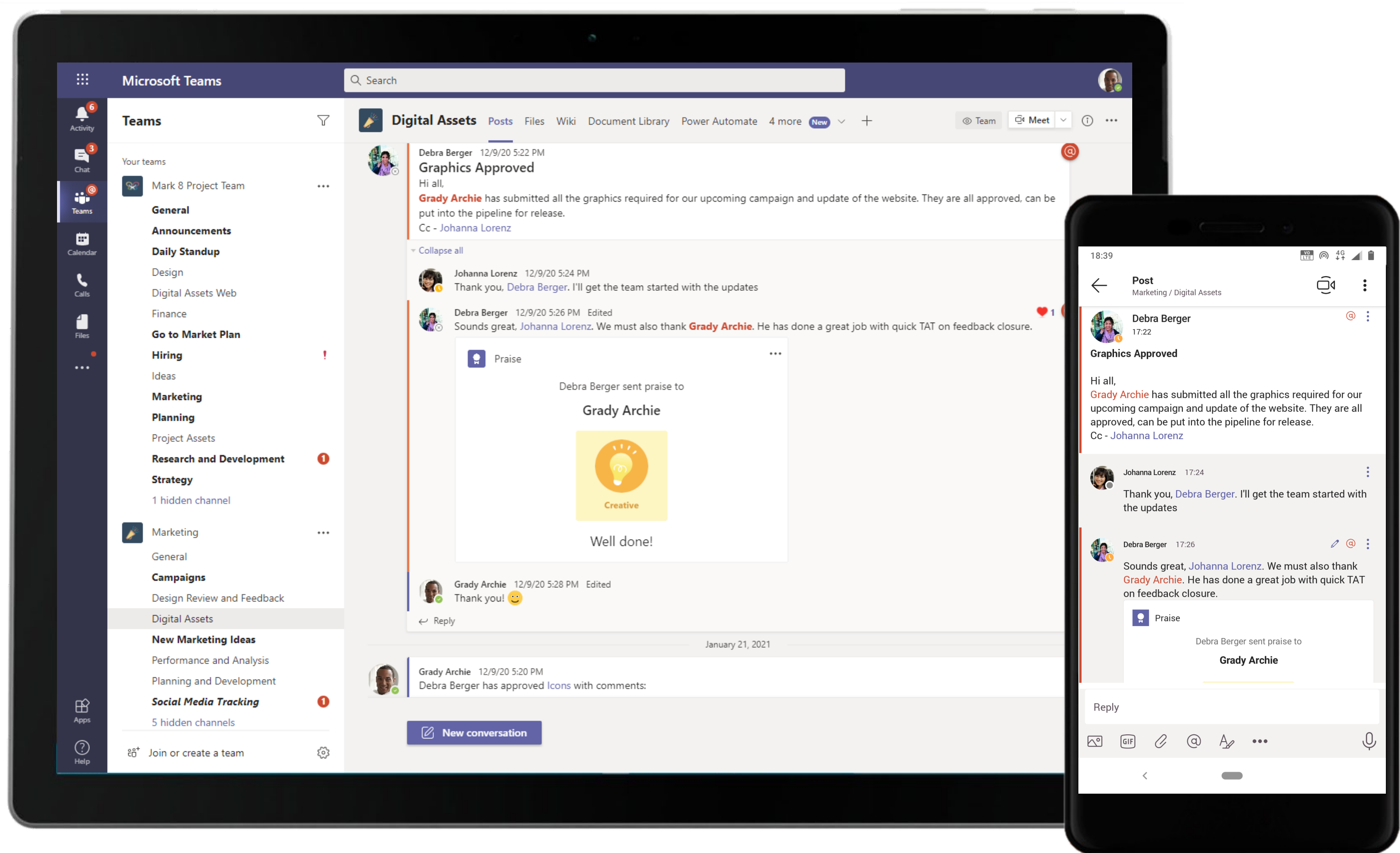
The Graphic Designer uses the integrated OneNote app within Microsoft Teams to capture meeting notes and feedback, without having to leave the application. The OneNote tab serves as a team notebook to the entire group, pinned to a channel.



Send, receive, manage, and share approvals in Microsoft Teams with the Approvals app. The Graphic Designer attaches a PDF document with the Icons and sends it to the Brand Strategist for her approval.



Track your approvals and get notified of updates at each step. The approvers are notified when requests are sent for their approval and the senders are notified as soon as their requests are approved.



Send acclaim to your employees and coworkers with Praise. Deliver in a chat, or for wider recognition, send it in a channel conversation. The Graphic Designer receives praise for his quick TAT and closure of feedback.

# Ready to soar?

[aka.ms/goTeams](https://aka.ms/goTeams) 

