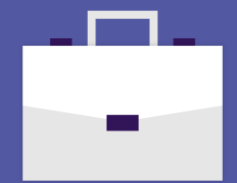




Microsoft Teams for Professional Services

Microsoft Teams



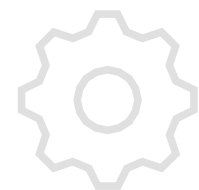


In this playbook...

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.

Business Development & Client Relationship

- Pursuing New Client Relationships
- Executing an RFP Proposal
- Hosting a Design Thinking Workshop for a Client
- Documentation and Post-Workshop Feedback



Project Management and Delivery

- Establishing Teamwork with a Plan
- Task Optimization and Presenting to the Steering Committee
- Coordinating with Team to Fix a Bug in Development
- QA Process for Testing a High-Priority Bug



Planning & Strategy (Headquarters)

- Review of Hiring Process by HR Leadership
- Mid-Month Sales Pipeline Report
- Coordinating Disaster Response Preparedness





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.

Human Resources

- Strengthening the Workplace Community
- Employee Engagement
- New Employee Training
- Talent Acquisition
- Review of Hiring Process by HR Leadership
- Onboarding Challenges Made Easy
- Competency and Compliance Training



Sales

- Building a Sales Summary
- Directing the Employee Path to Expertise
- Preparing for a Monthly Review
- Forecasting Sales and Conducting Gap Analysis
- Identifying and Closing a Major Sales Opportunity



Marketing

- Introducing a New Route in the Network
- Preparing for World Series
- Pop-Up Kiosks
- Monitoring Negative Responses





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.

Information Technology

- Inventory Tracking
- Firmware Updates
- Troubleshooting & Repairs Tickets
- Developing a Mobile Application
- Bug Management



Finance & Accounts

- Planning Budget for Holiday Giveaways
- Budget Approval
- Reliability and Serviceability
- Tracking Milestones for Invoicing and Payments





Business Development & Client Relationship

Check out how Project Leads and Delivery Managers can use Microsoft Teams to keep business operations running efficiently and address unexpected situations with confidence.

Business Development & Client Relationship 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 securely collaborate with teammates on multiple projects from within a single environment

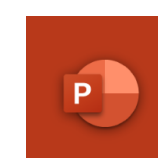
Apps that enable an immersive experience in Teams



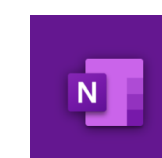
Word



Excel



PowerPoint



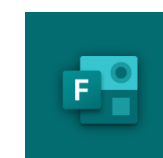
OneNote



Asana



monday.com



Forms



Power BI



Lucidchart



Trello



Shifts



MURAL



Smartsheet



Presentations
AI



Teamwork



Adobe
Sign



Tasks by
Planner
and To Do



Communities

Meet the Business Decision Makers

Business Development & Client Relationship



Account Manager

"The key to successful leadership today is influence not authority."

- Operate as the lead point of contact for any and all matters pertaining to specific accounts
- Build and maintain strong, long-lasting client relationships
- Oversee client account management, including negotiating contracts and agreements to maximize profit



Delivery Manager

"Customer-first is the hat I wear everyday. Managing customer expectations is what gives me the kick."

- Own development of plan to review and manage client expectations
- Create an integrated project plan from the individual project plans, showing the high-level flow of project milestones and dependencies across projects
- Lead business and functional requirements



Pursuing New Client Relationships

Account Manager

Scenario Walkthrough

A potential offshore client has included Contoso on a recent RFP. Knowing that this is a high-revenue project, Contoso puts together a strong business development team led by a seasoned Account Manager. The Account Manager needs a central location to track tasks, share documents, and follow-up on work with the team. Microsoft Teams comes to her rescue!

- Creates a new team and channels to share proposal documents and hold discussions with relevant team members.
- Welcomes team members with a post in the channel and sets project expectations.
- Shares an RFP brief as a Word document in the channel, where it will be housed in the Files repository for the team's access.
- Assigns task tracking to the Project and Delivery Lead.
- Reviews the task list and @mentions relevant team members on their action items. Moves the project to the next phase of execution.

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

- Single collaboration space that allows for the assembly of opportunity teams by channel in Microsoft Teams to carry out and execute specific RFP responses.
- Visibility into work as it is planned and tracked using MeisterTask in Microsoft Teams.
- Powerful document creation with Word right within Teams.

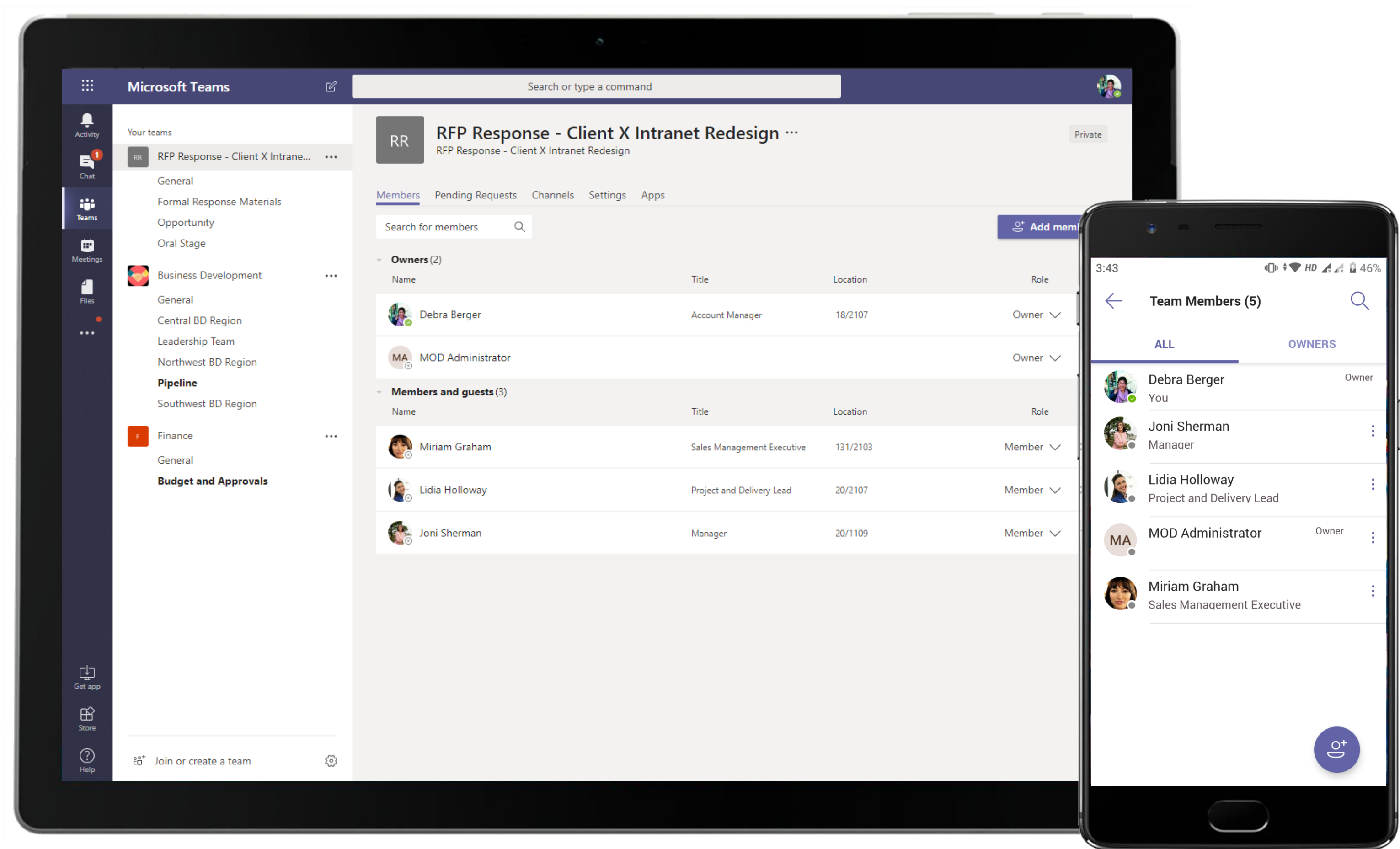
Which app integrations on Teams made it possible?



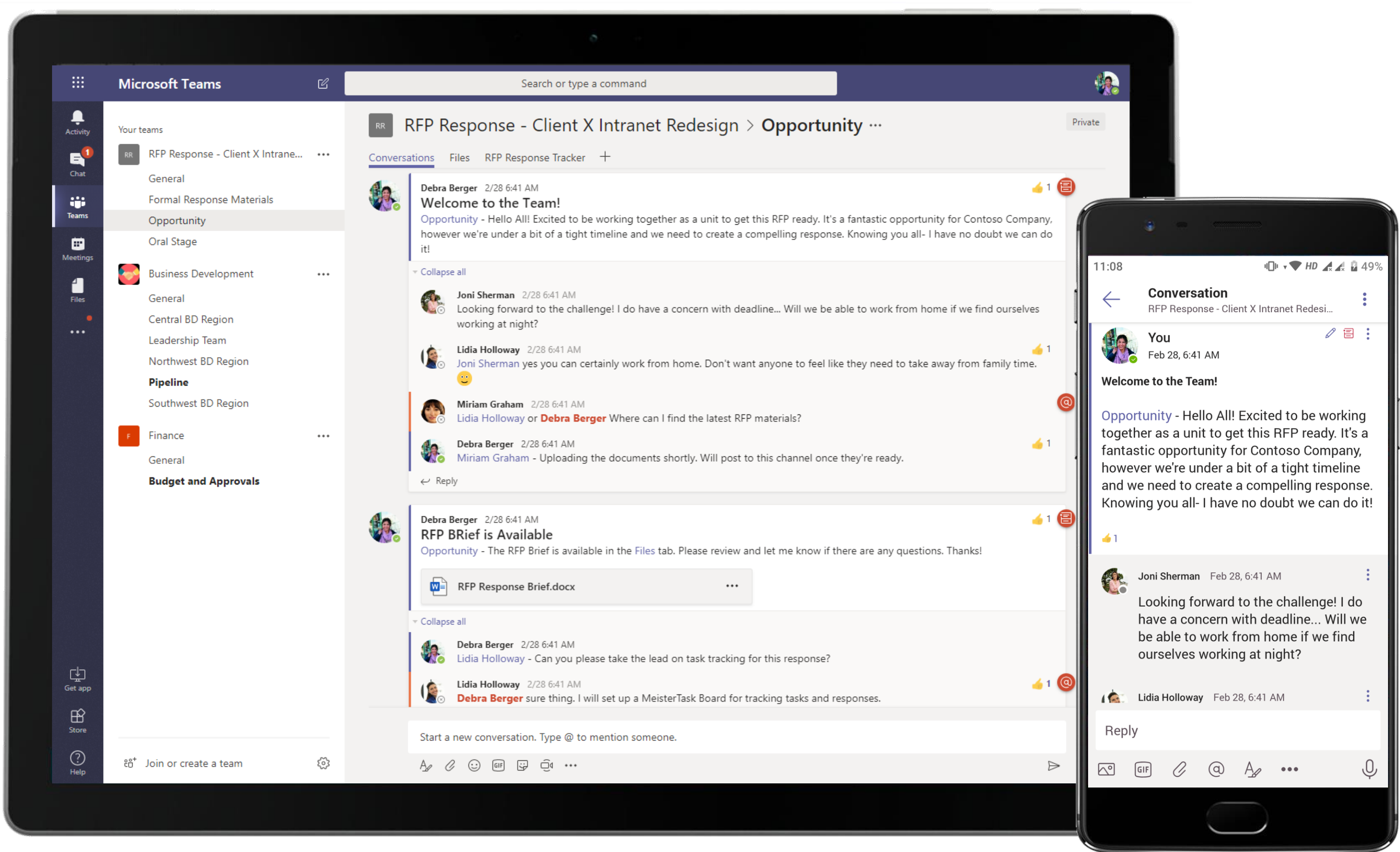
Word



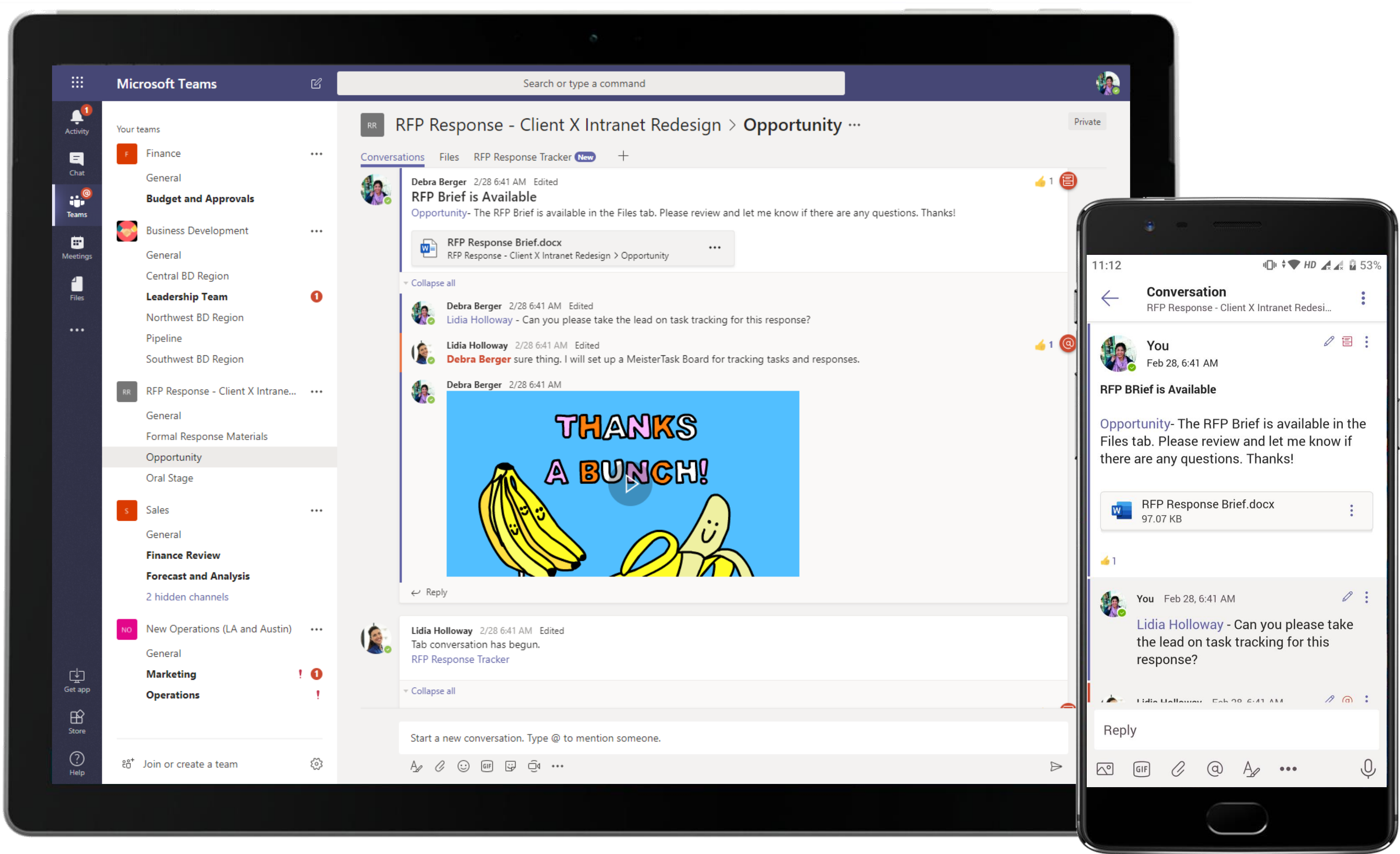
MeisterTask



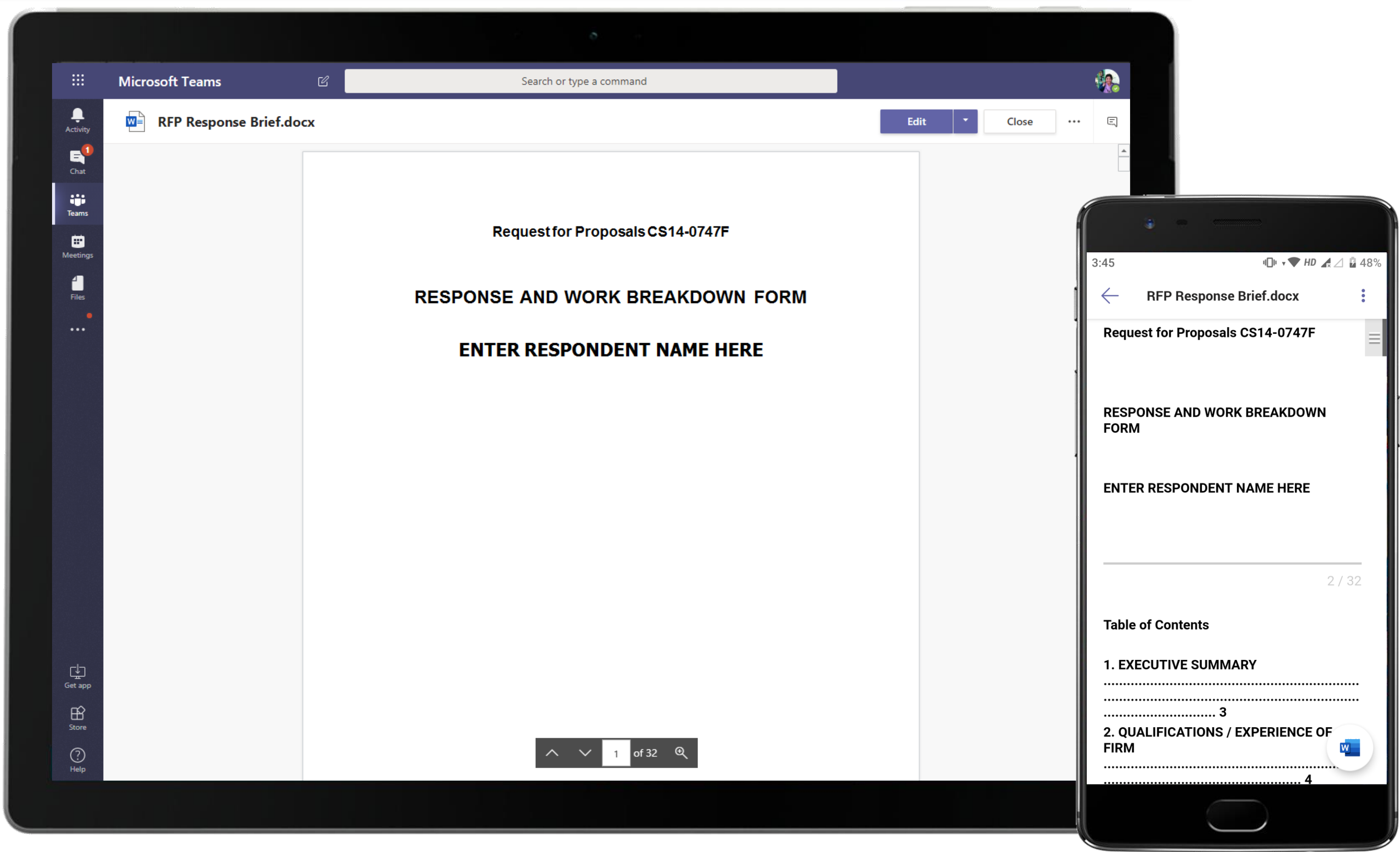
The team assembles for the RFP response and collaborates in a private channel, where information is exchanged and decisions are taken in real time - keeping all relevant stakeholders in loop.



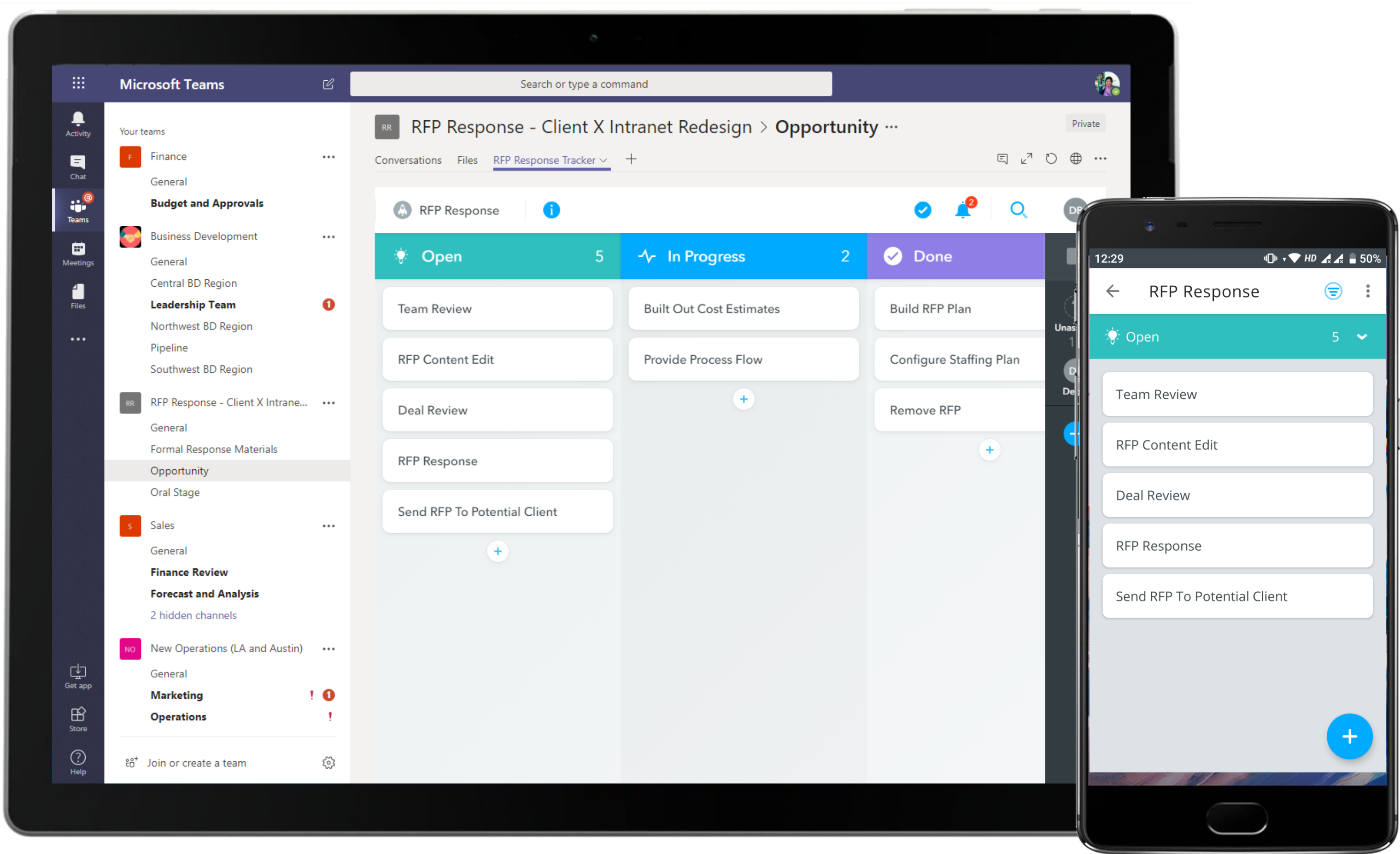
The Account Manager sets out the RFP proposal details and introduces team members to the task at hand. Team members react to the news, while engaging in productive chatter.



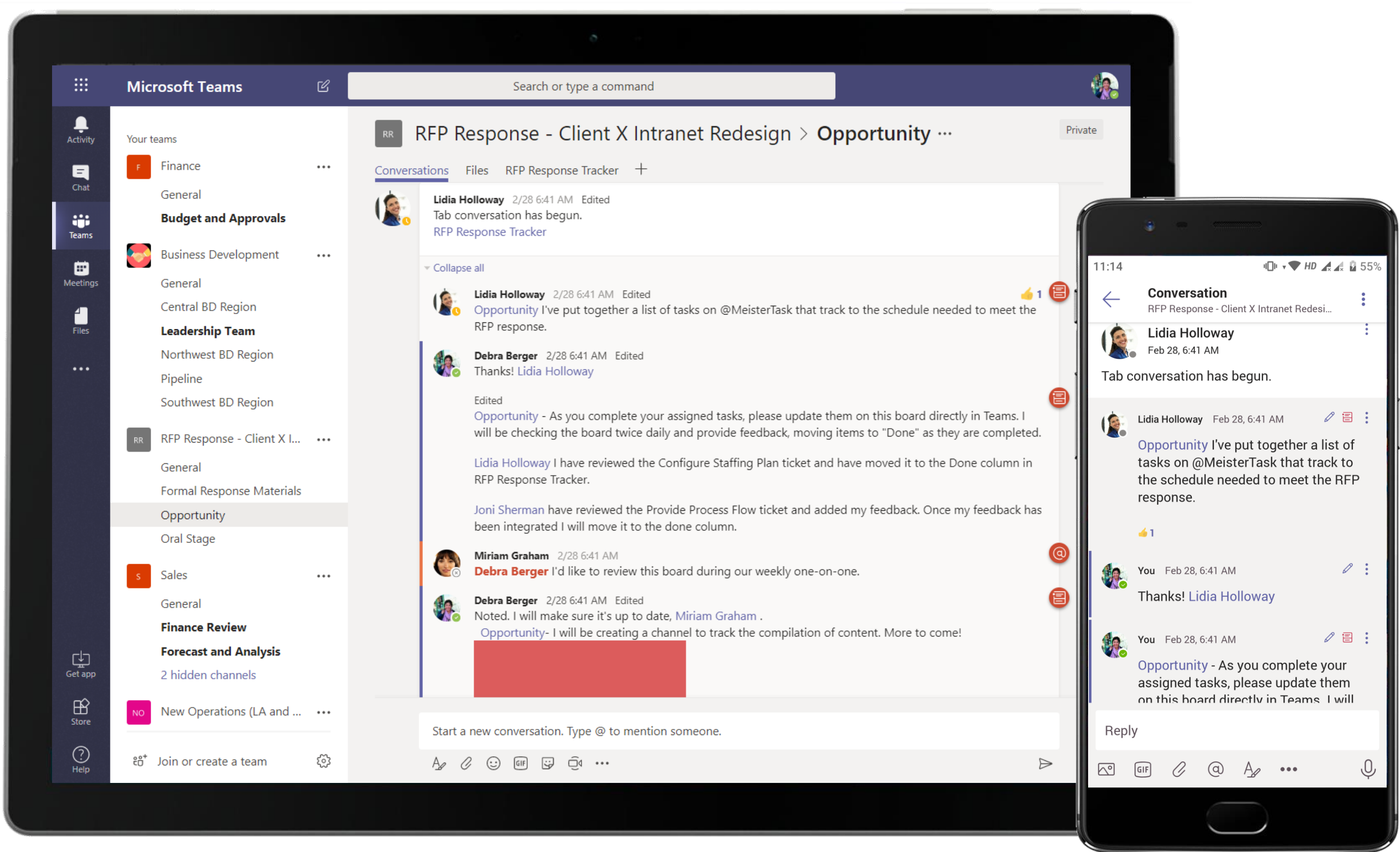
The conversation in the channel continues and stays relevant to the project. The Account Manager shares the RFP brief with the business development team and they discuss setting up a task board to assign process owners.



Co-author and edit Word documents within Teams. The RFP brief shared by the Account Manager will be housed in the Files repository for the team's access.



With every form of internal communication, there's a risk that actionable tasks can get lost. Embed project management applications such as MeisterTask Kanban boards to manage and collaborate on tasks, directly inside Teams.



Customize a team with tabs. Add tabs for files, notes, websites and apps – it makes it easy for team members to access frequently used content or services with just one tap.



Executing an RFP Proposal

Account Manager

Scenario Walkthrough

The RFP proposal is at its execution phase once process owners have been identified and the task board set up. Utilizing the collaborative capabilities of Microsoft Teams helps Contoso stay connected and communicative throughout their business development efforts, facilitating the process, and helping the company land a new client. The Account Manager works with leadership and the RFP team members to take the proposal through various phases till approval.

- Sets up an exclusive channel in the team to move the proposal to the execution phase.
- Shares the proposal PowerPoint deck as a working file for the team to work on.
- Assigns resource management estimate to Project Manager and reviews the estimate shared in an Excel file.
- Views leadership announcement that the proposal has been cleared for oral discussions with the client.
- Receives a relevant article to Oral Presentation with News.
- Shares prep materials for the oral response and shares an RFP outline Word template.
- Hosts a series of meetings to flesh out and prep for the oral presentation.
- Announces to the team that their client has approved the proposal.

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

- Create impactful visual presentations with PowerPoint, right within Teams.
- Create impactful summaries of crucial data with Excel and Word for Microsoft Teams.
- Keep the team in the loop and engage them with relevant and latest industry practices and trends with News.

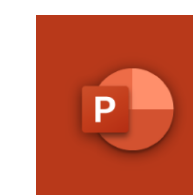
Which app integrations on Teams made it possible?



Word



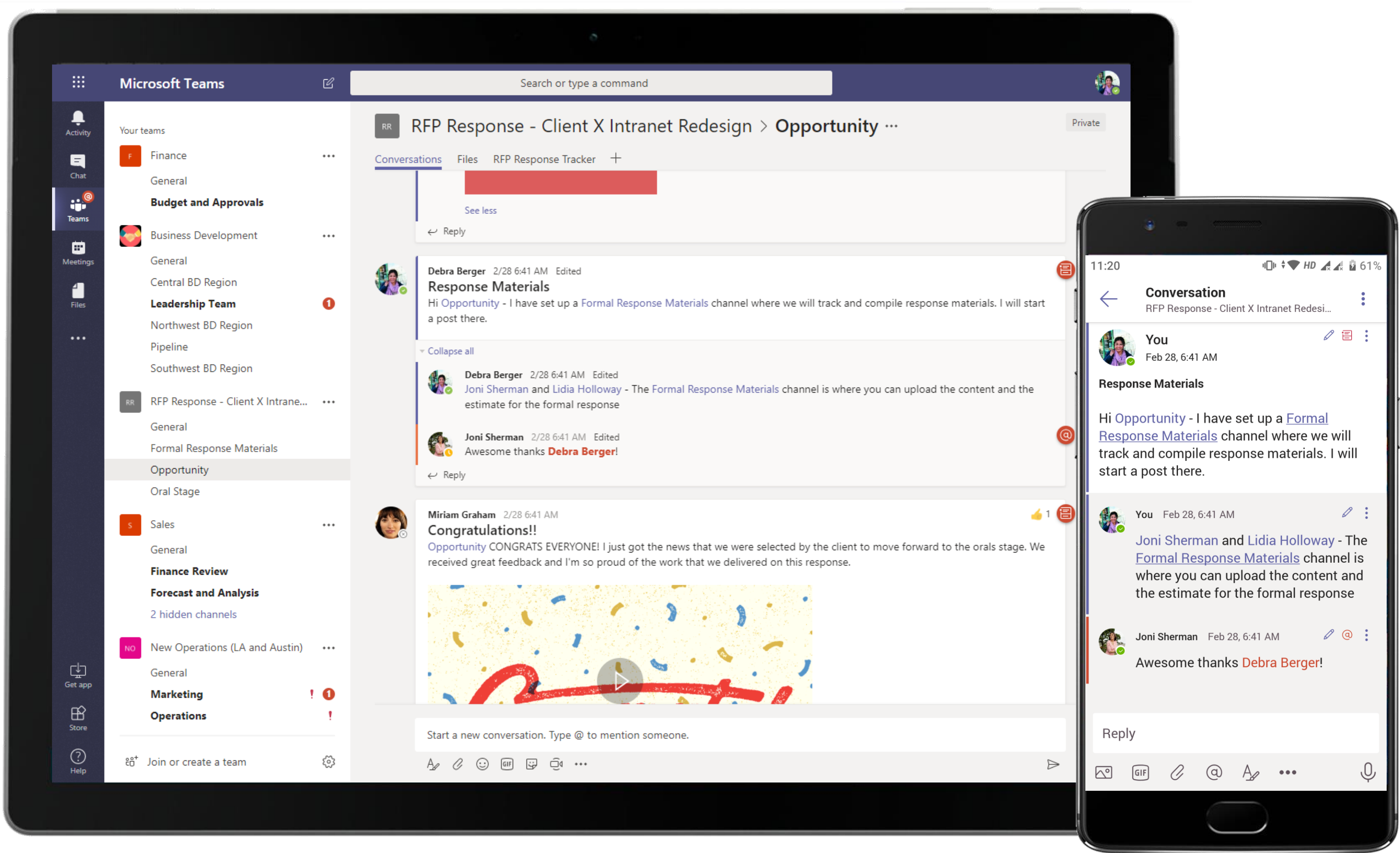
Excel



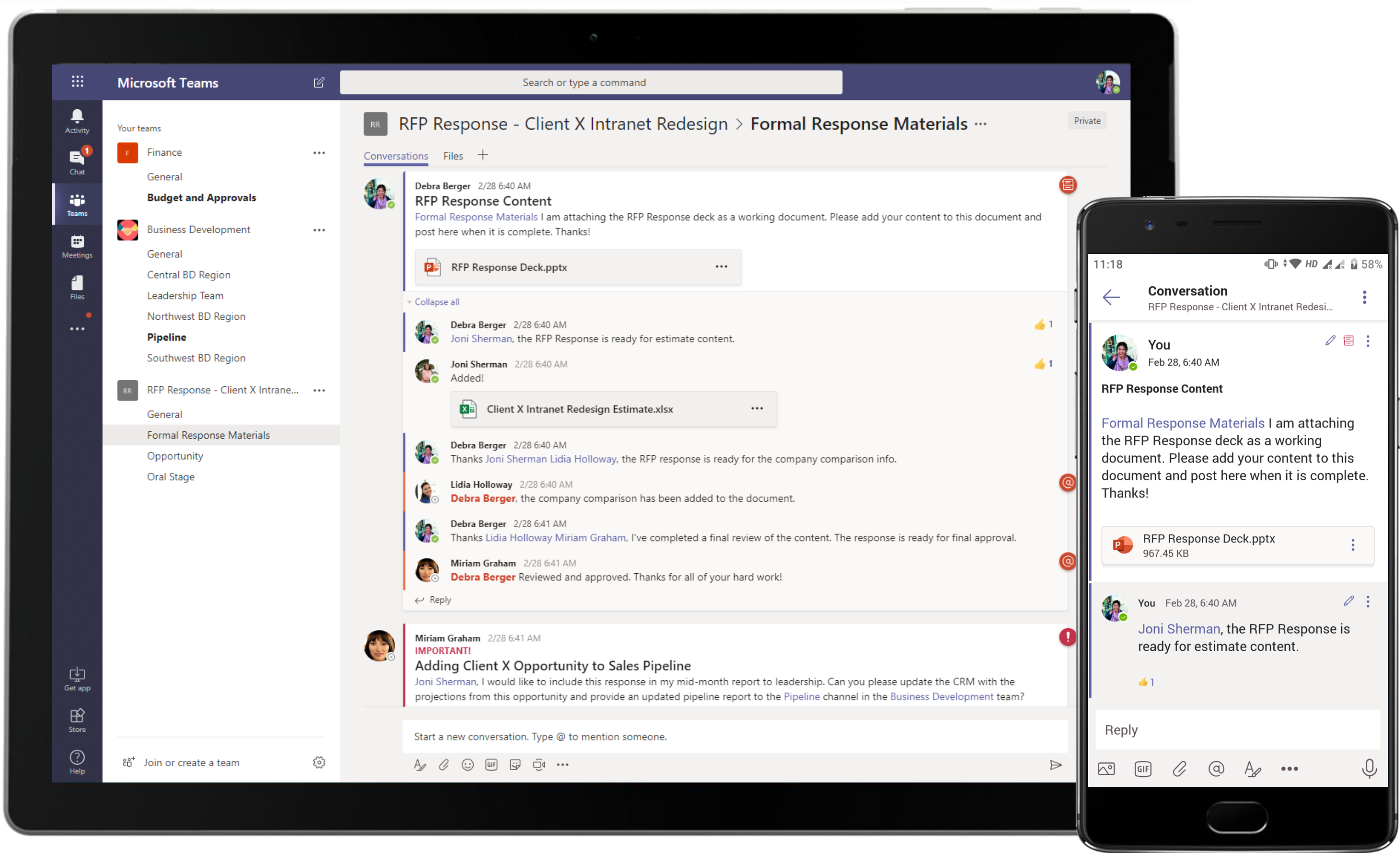
PowerPoint



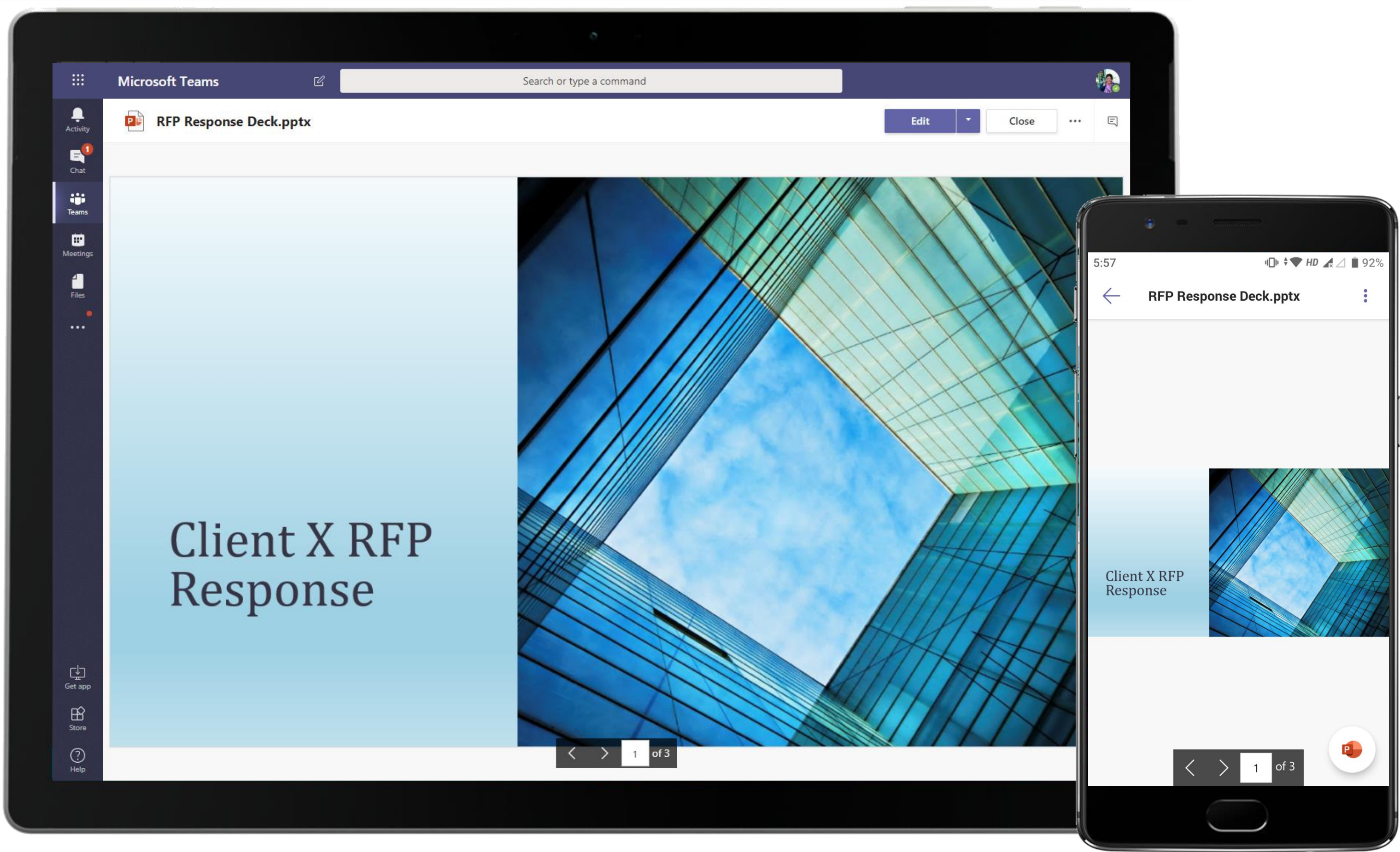
News



Teams and channels are where you hold meetings, have conversations and work on files together with team members. They are built around a topic, like "Formal Response Material," a department name, or even just for fun.

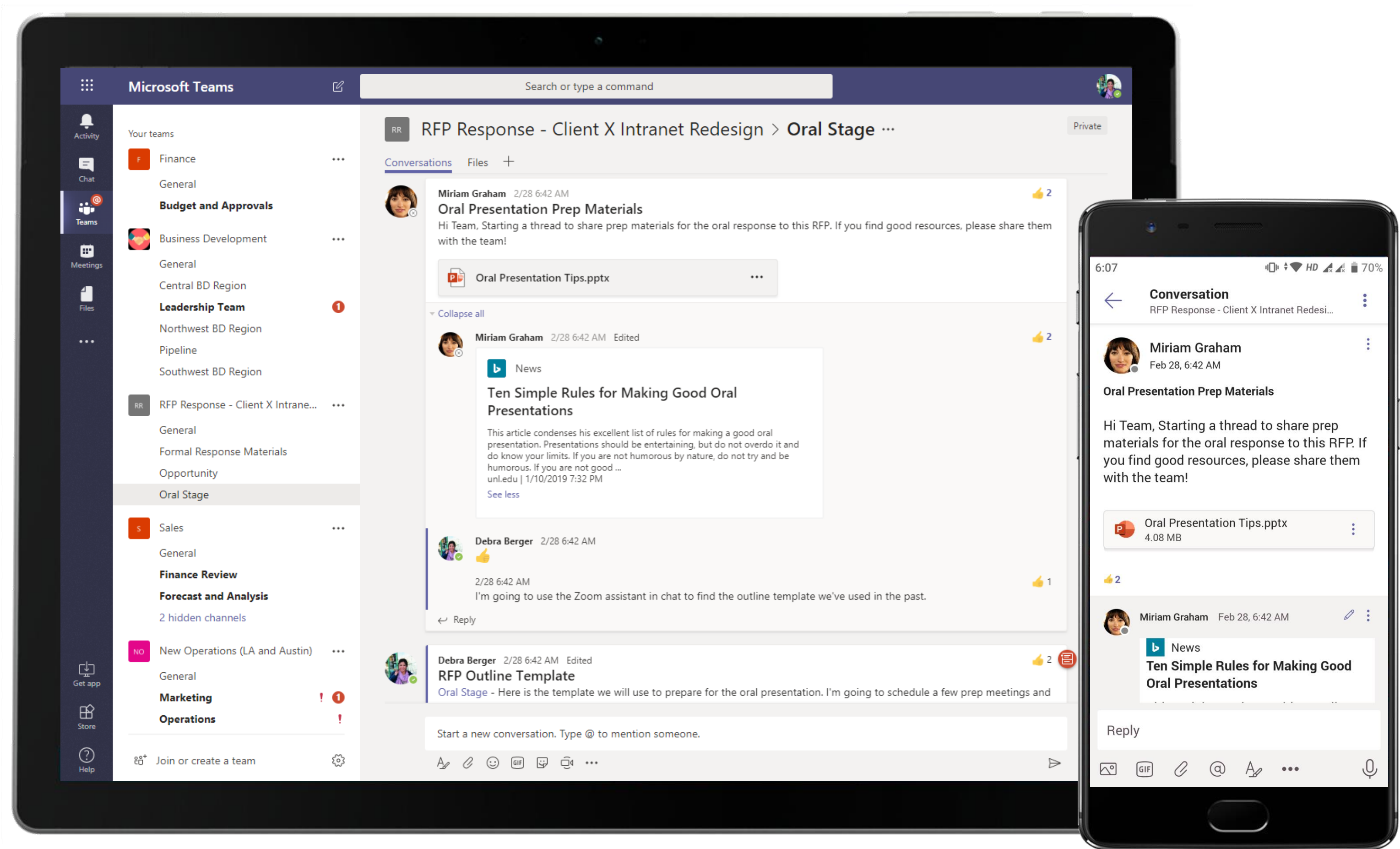


Microsoft Teams conversations are threaded so users can reply directly in-context to specific conversations, keeping relevant files grouped together. @mention relevant team members to make sure you grab their attention in real-time.

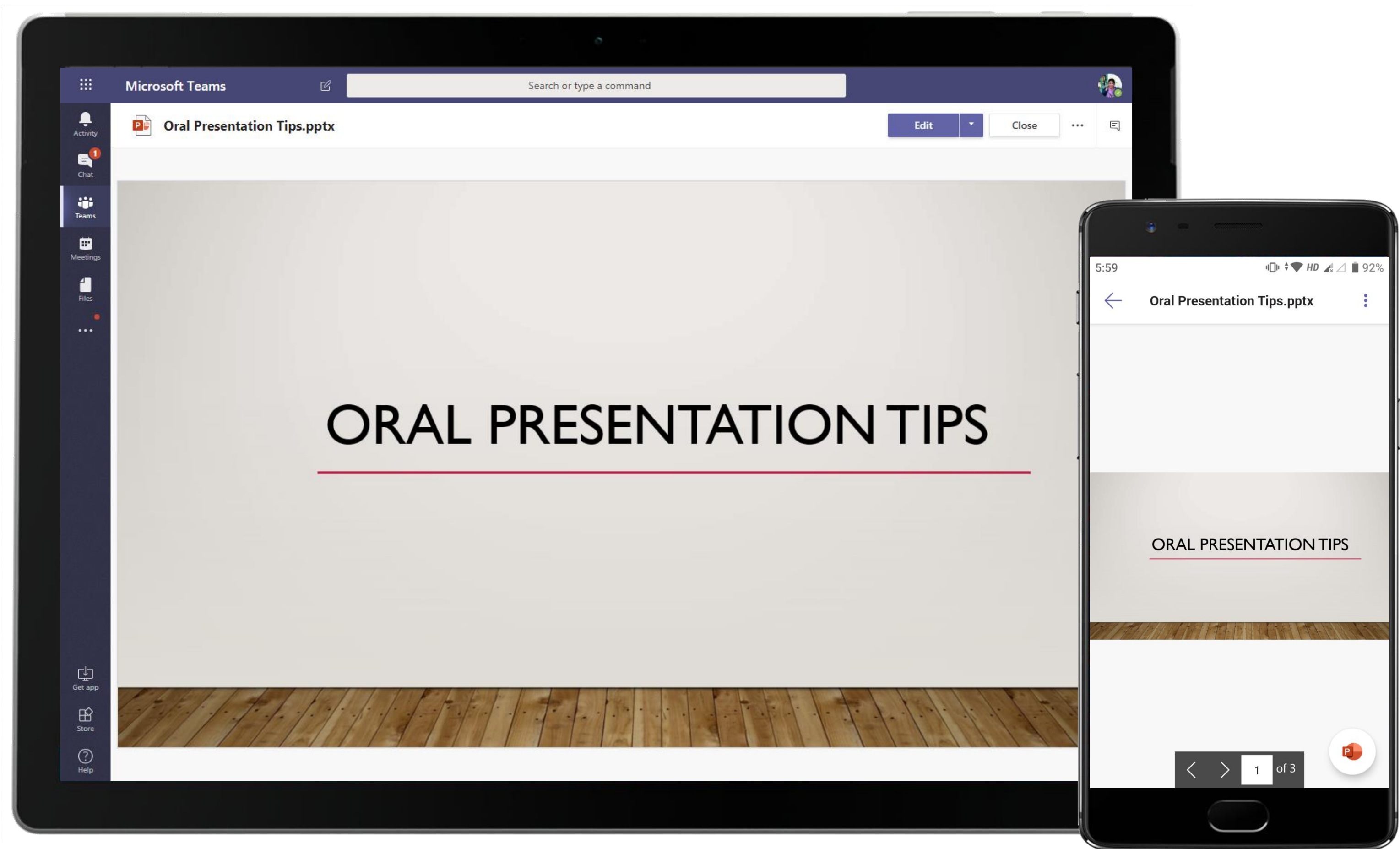


Edit your presentation and customize it on the go, collaborating with others in real time within Teams. The Account Manager shares the proposal PowerPoint deck as a working file for the team to work on.

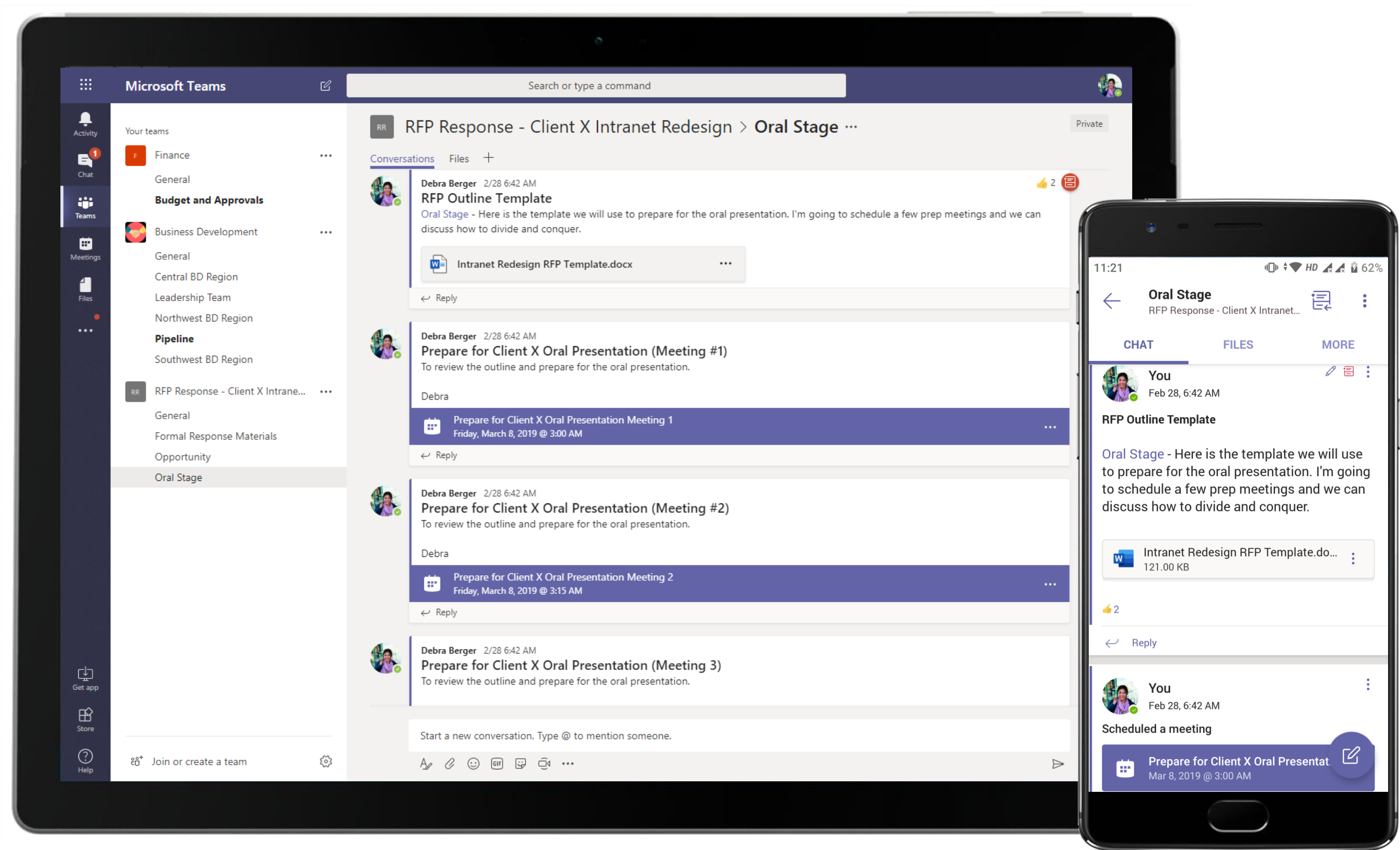
Use Excel's analytical abilities within Teams to build reports and share them with your team. The Account Manager assigns resource management estimate to a Project Manager and reviews the estimate shared in an Excel file.



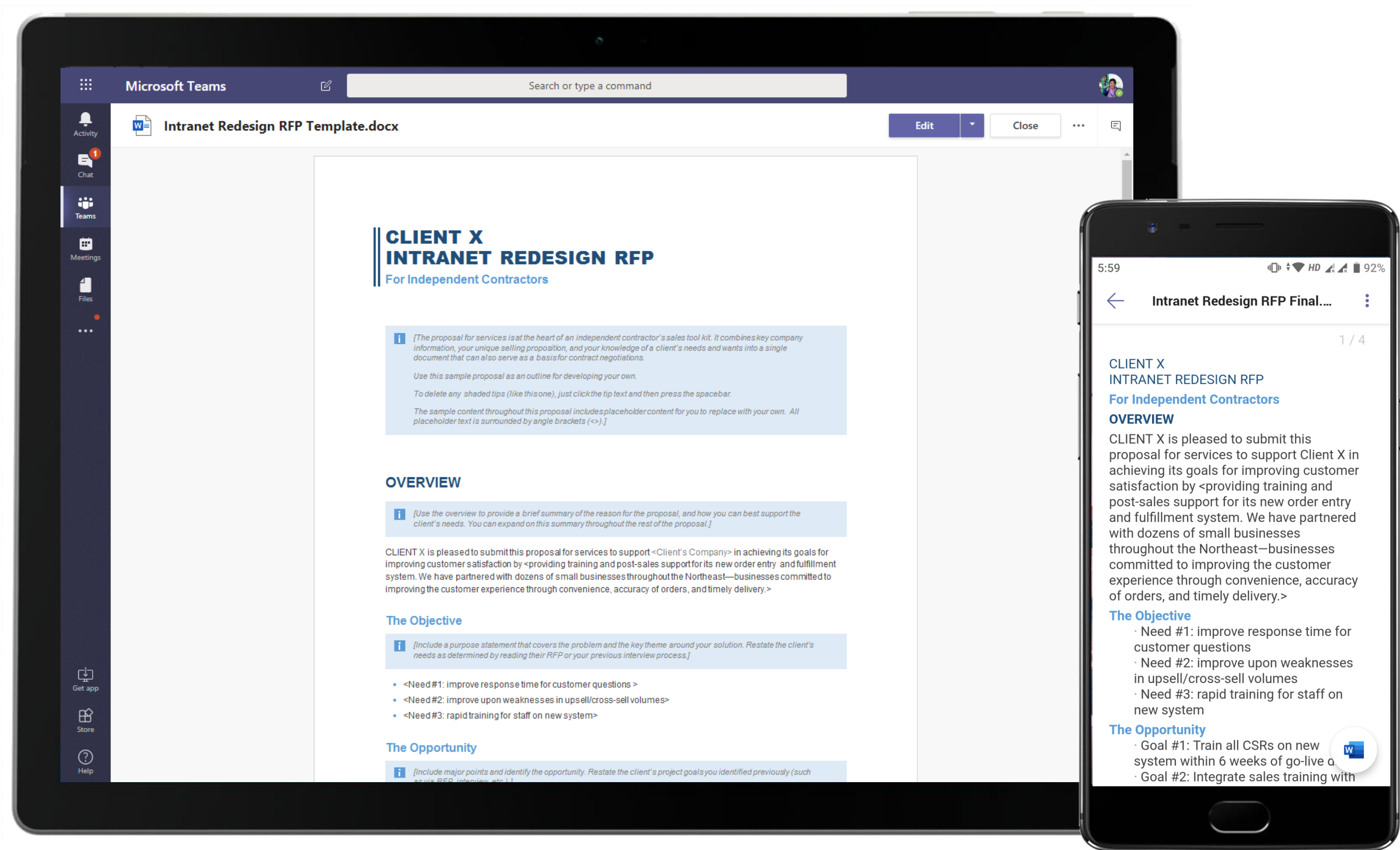
Share snippets of relevant news within the channel using the News app travelling with the user in the compose box of Teams, which allows you to keep your team in the loop as well as engage them with important or interesting stories.



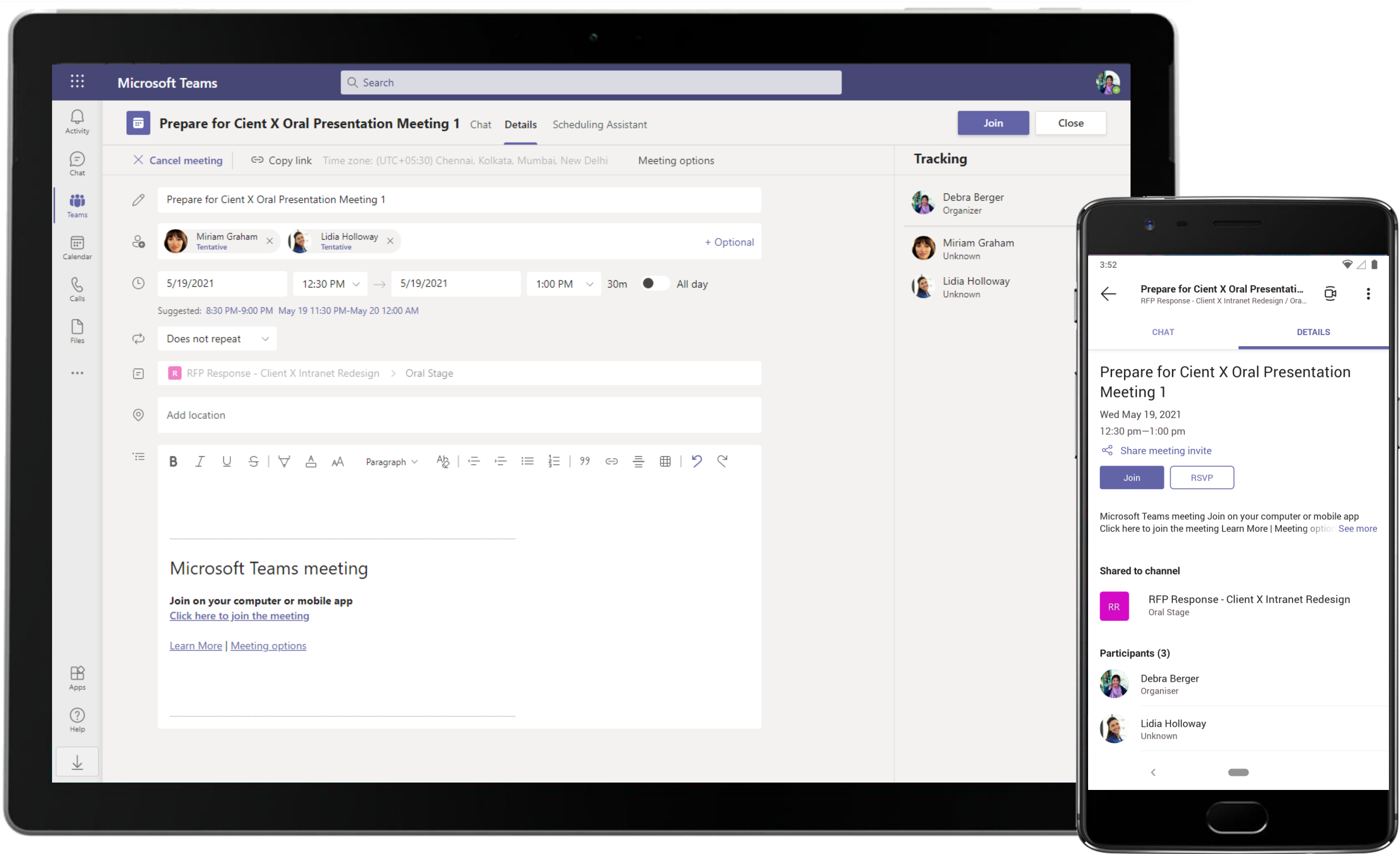
Along with a relevant news article, a Sales Exec shares a PowerPoint deck for team members to help prepare for the oral stage of the RFP. The deck stays housed within the channel's Files tab, from where it can be accessed for any future needs as well.



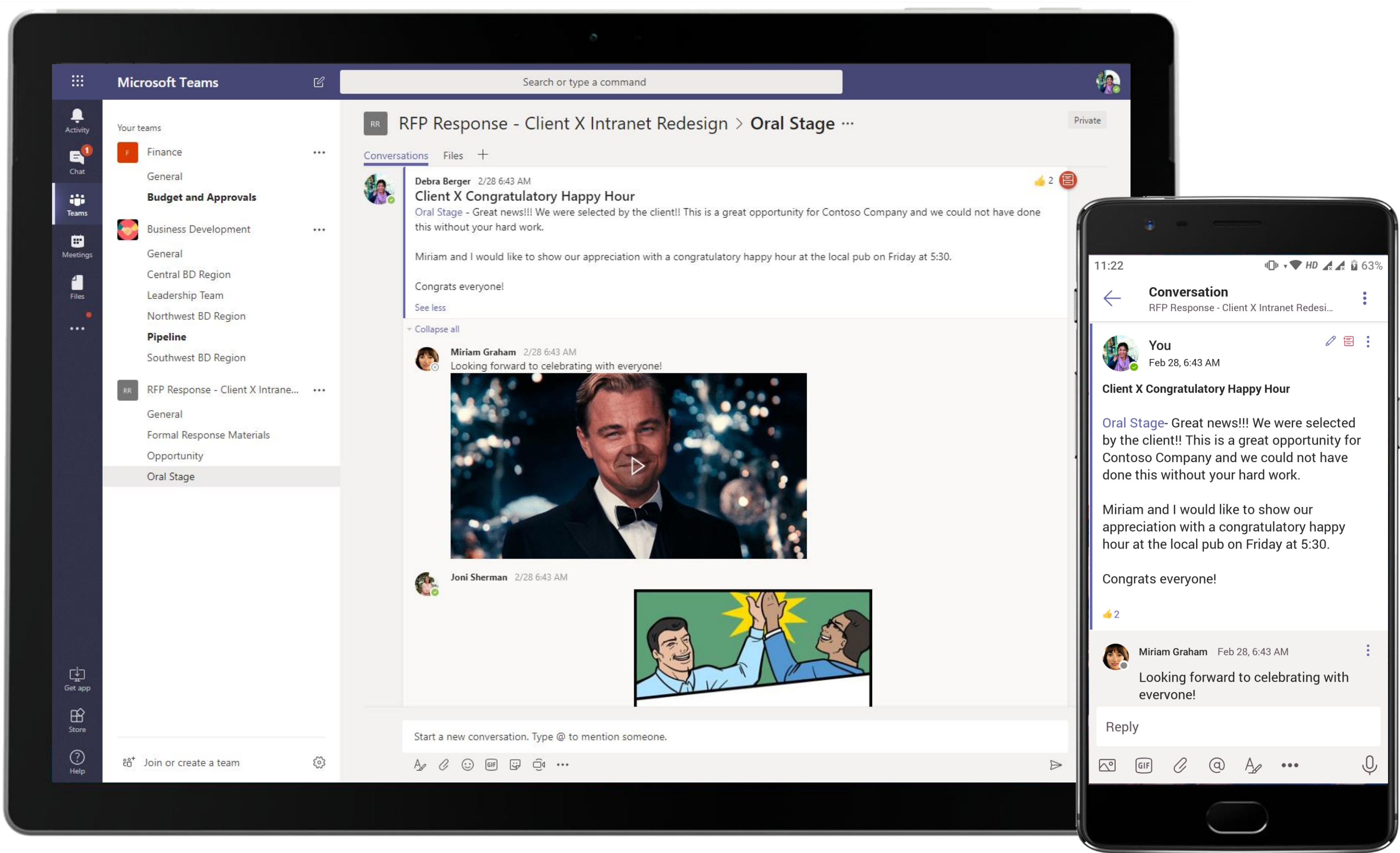
The Account Manager moves the conversation to a new channel to keep conversations relevant to the oral stage of the RFP presentation and uses the channel for regular sync calls to prepare team members.



The Account Manager shares the RFP template as a Word document. Enjoy powerful document creation and editing with Word. Store team documents easily and securely within Teams.



Meetings can either be scheduled or triggered instantly (using Meet Now). The RFP team meets on Teams which persists any conversations and decision taken during the meeting for easy future reference.



The Account Manager uses channel communication to inform her team when the RFP process is complete. Intense in moments of work flurry, these channels also see a fair amount of levity with GIFs and emojis that makes working together fun!



Hosting a Design Thinking Workshop for a Client

Delivery Manager

Scenario Walkthrough

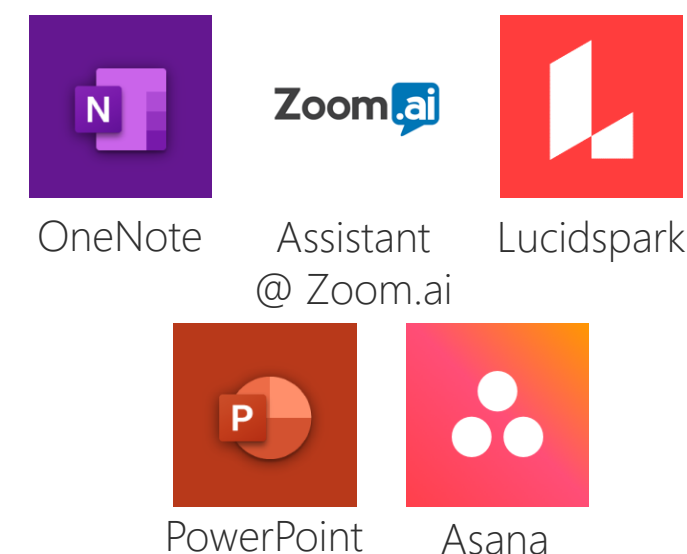
One of Contoso's London-based clients is struggling to innovate and maintain market share. Contoso recommends that the client participate in a workshop led by Contoso design thinking experts. For the workshop to be successful, everything must run smoothly, and the client needs to see value in the time and money spent with Contoso. The Delivery Manager coordinates for the workshop.

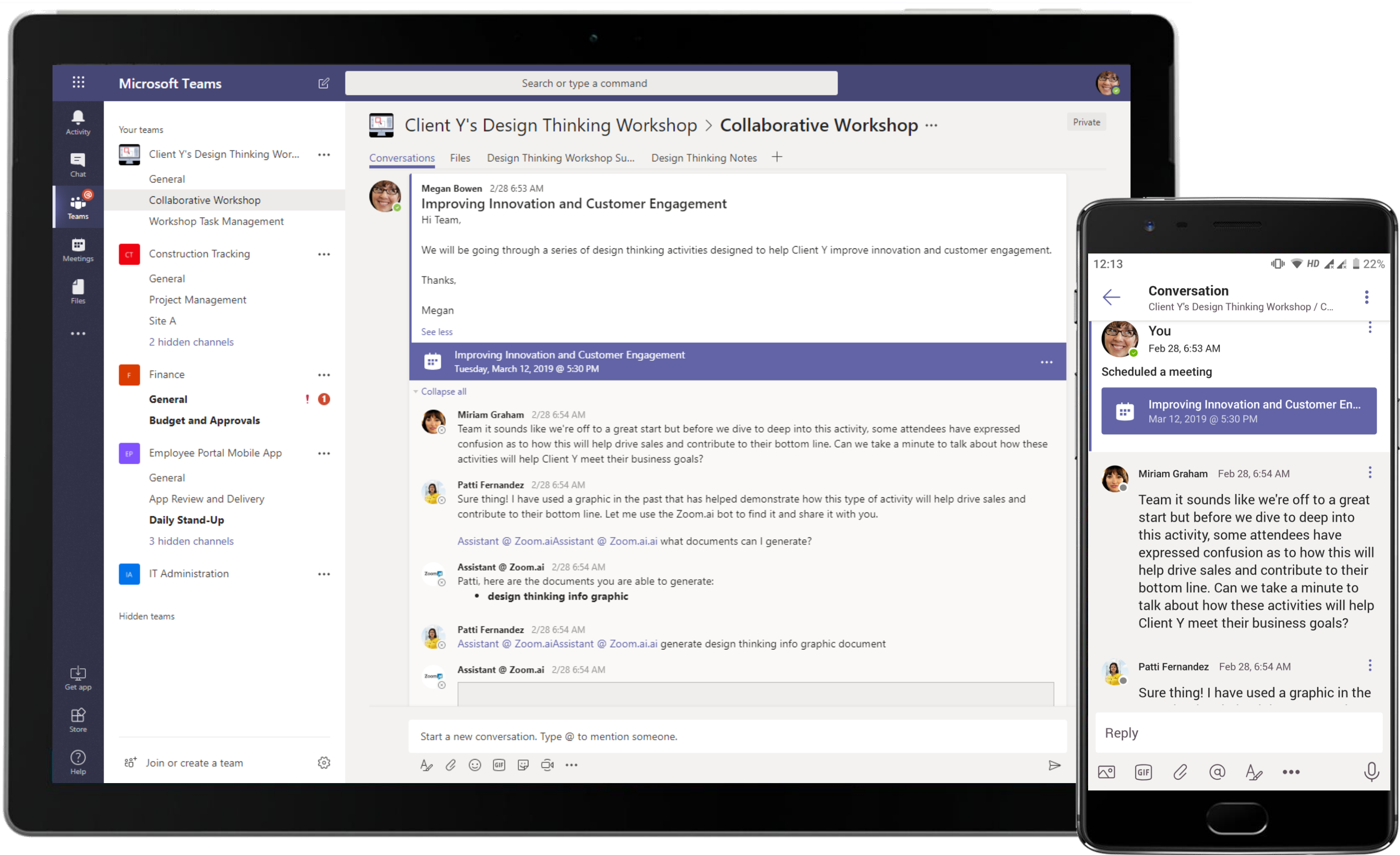
- Initiates a conversation and meeting with design experts and team members in the channel to discuss details of the workshop.
- Assimilates meeting outcome in a OneNote tab.
- Uses Zoom.ai to track down an infographic for workshop attendees and uses Lucidspark whiteboard to sketch ideas.
- Creates a task list using Asana and assigns task management to a Senior Consultant.
- Reviews workshop PowerPoint deck created by the Project Lead.
- Hosts a channel meeting to discuss feedback and close out ideas for workshop activities. The team is now all set for the workshop.

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

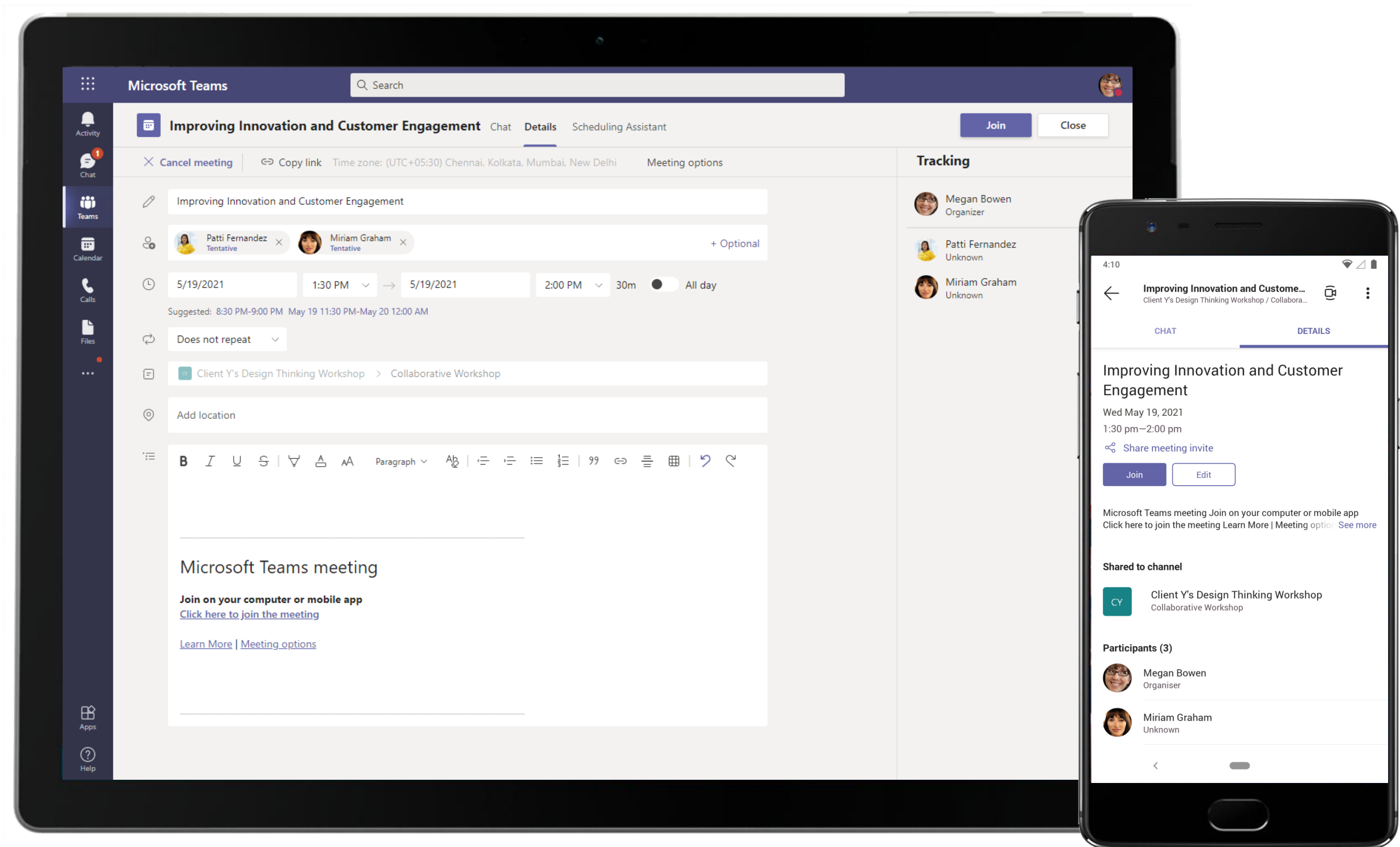
- Create session minutes that are distributed immediately using a OneNote tab.
- Conduct remote brainstorming sessions with clients through the Lucidspark connected application.
- Collaborate on Asana tasks and keep work connected in Teams.
- Use of Zoom.ai to quickly track down files without derailing other tasks at hand.
- Harness the power of bots and apps within Teams to achieve better business outcomes.

Which app integrations on Teams made it possible?

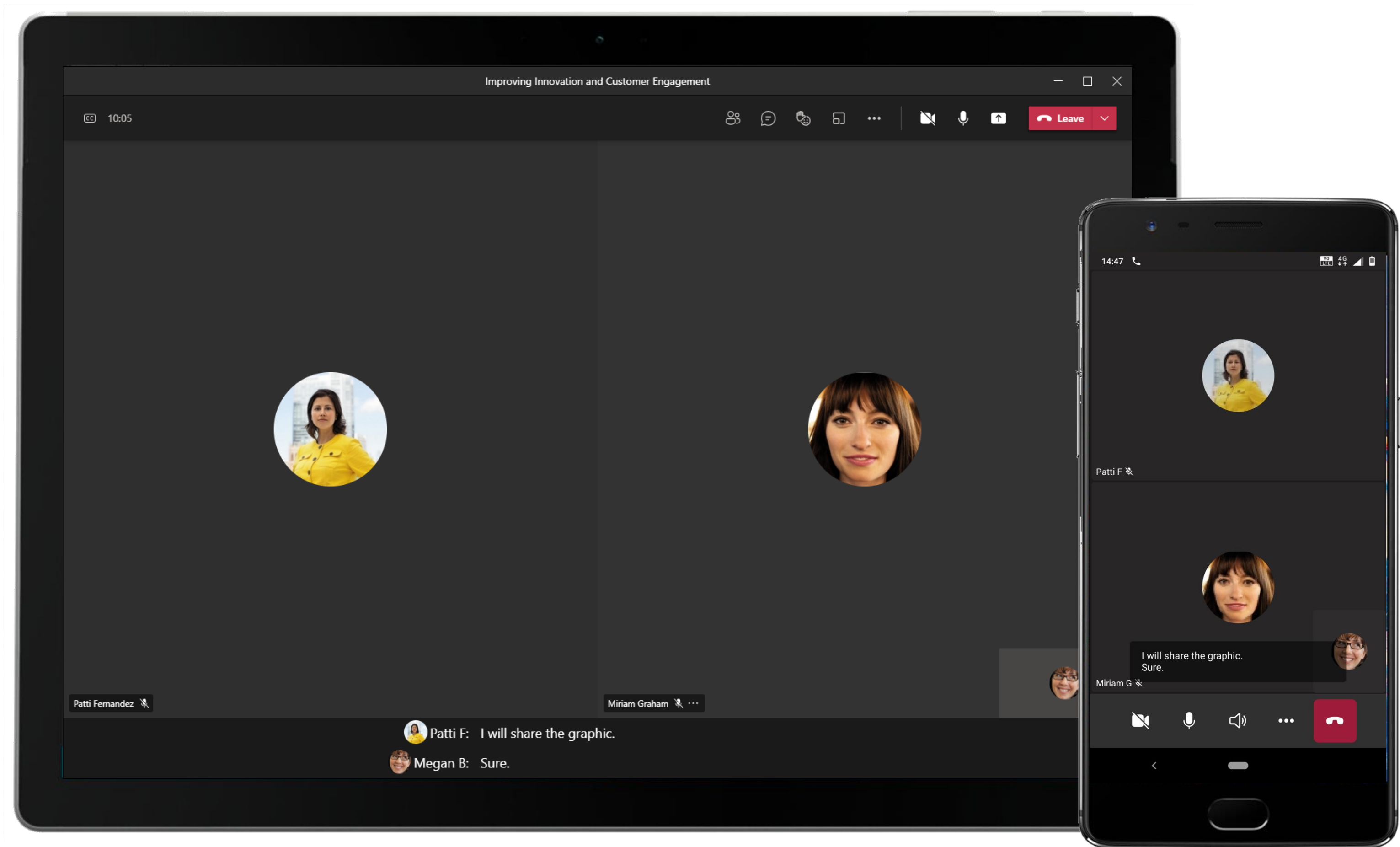




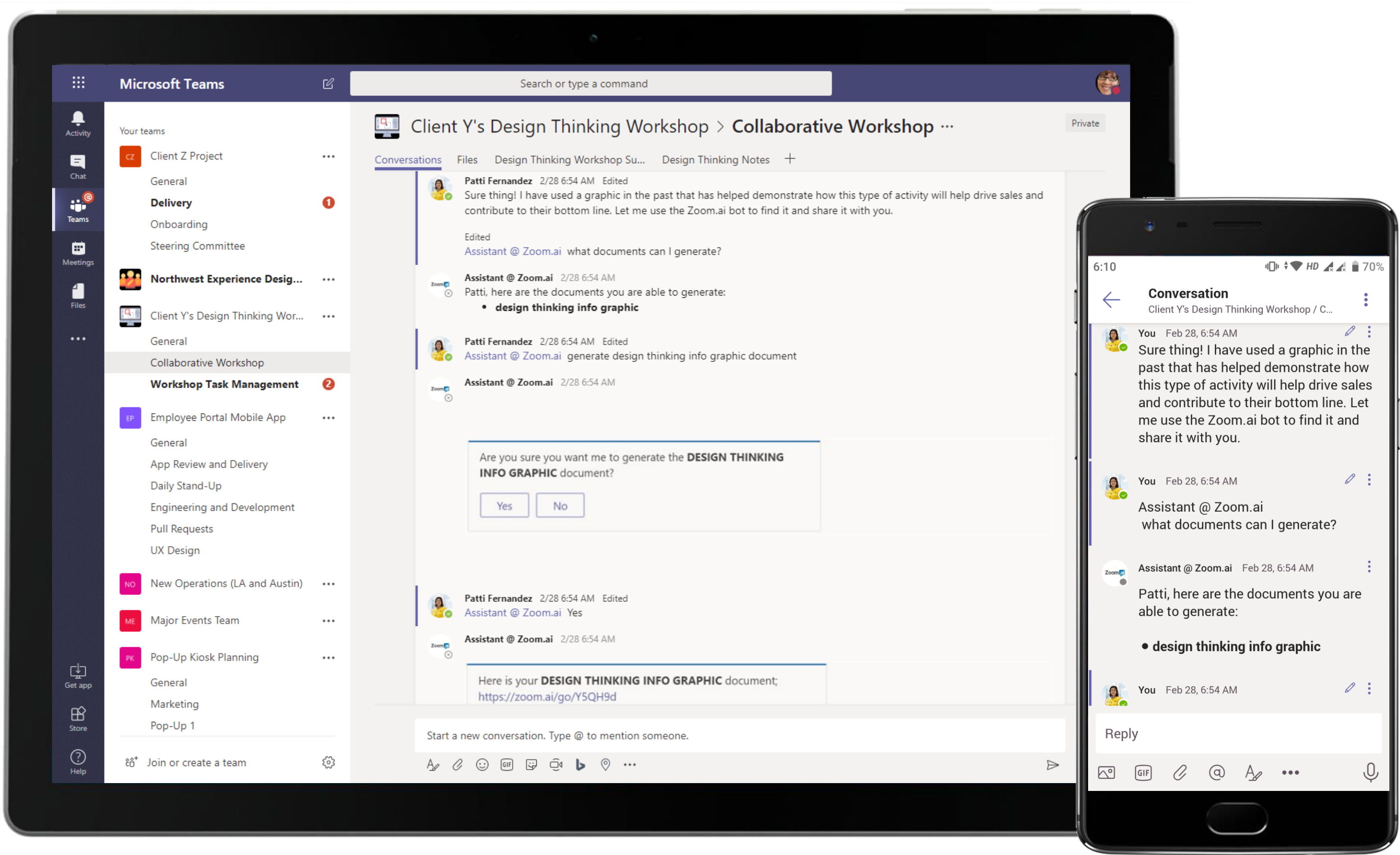
Dedicated channels created to facilitate instant group communication by event or topic allow team members to collaborate in channels for meetings and discussions and share information directly to accelerate decision making.



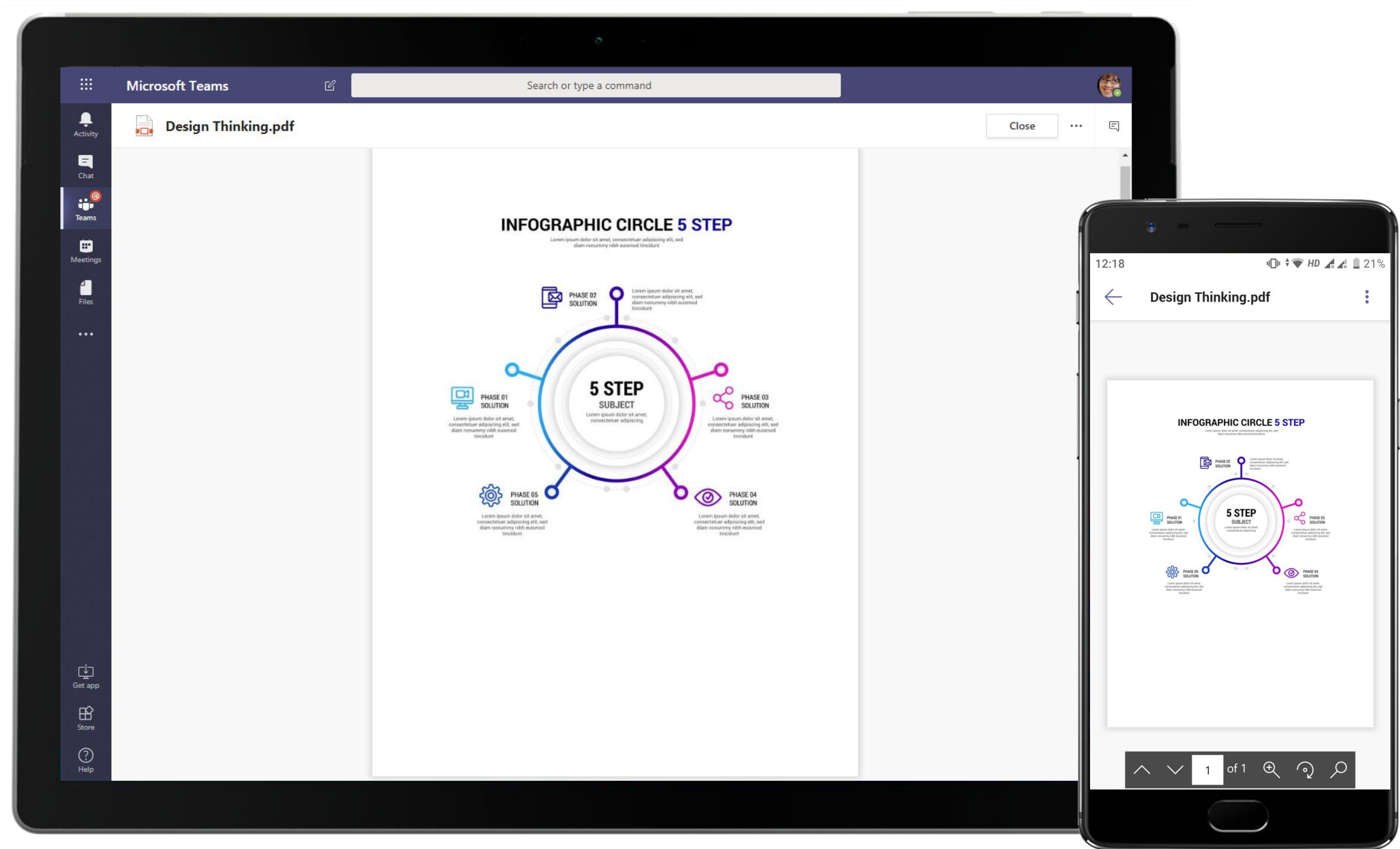
The Delivery Manager sets up a meeting with design experts and team members in the channel to discuss the workshop. With Microsoft Teams, meetings provide vast collaborative opportunities using screenshare, video conferencing, and more.



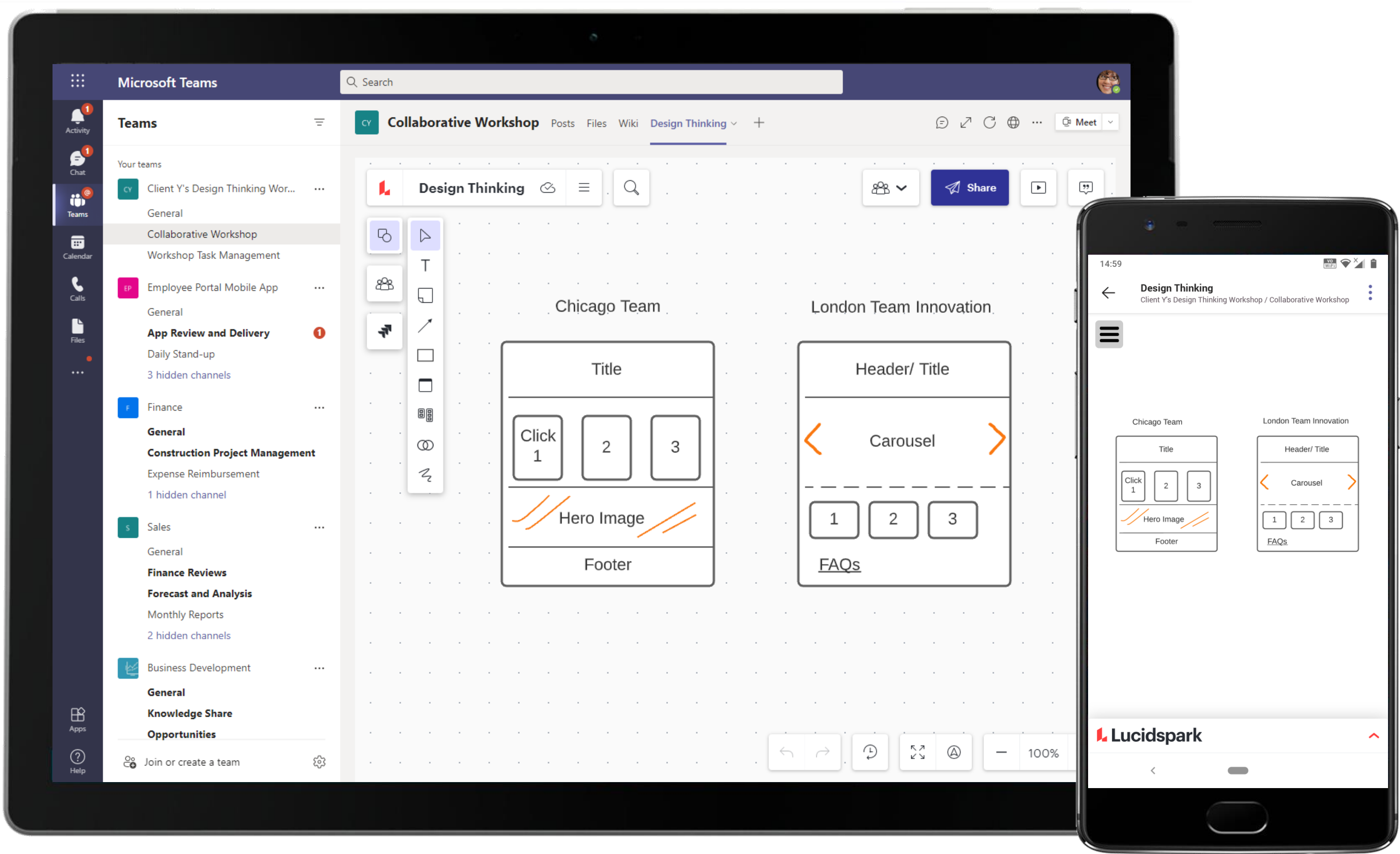
Teams can detect what's said in a meeting and present real-time captions. When enabled, the live captions will include speaker attribution—so you'll see not only what's being said, but who's saying it.



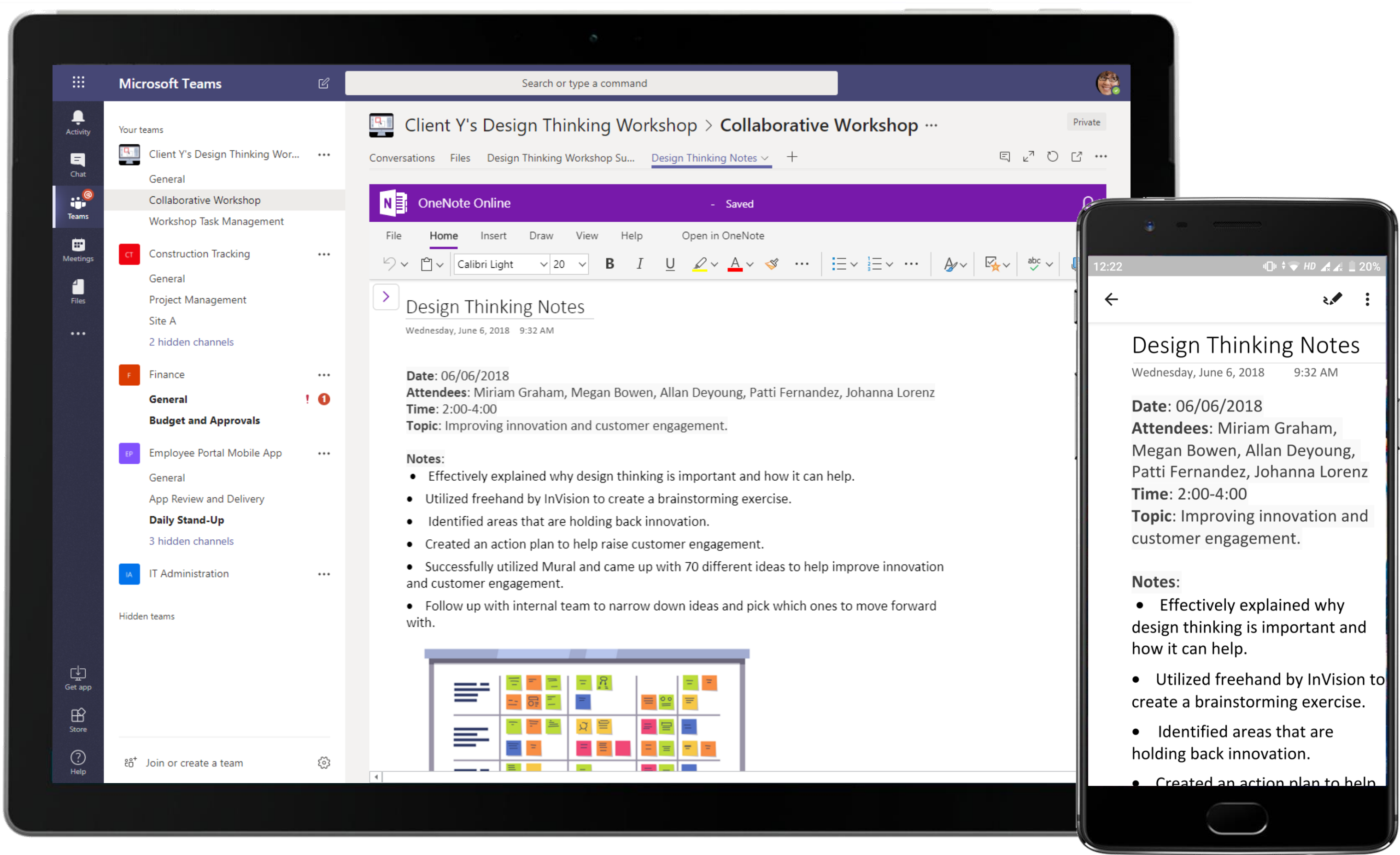
Simple tasks such as searching for files can take hours and derail an otherwise productive workday. Organize your work day with your very own automated assistant, like Zoom.ai, on Microsoft Teams.



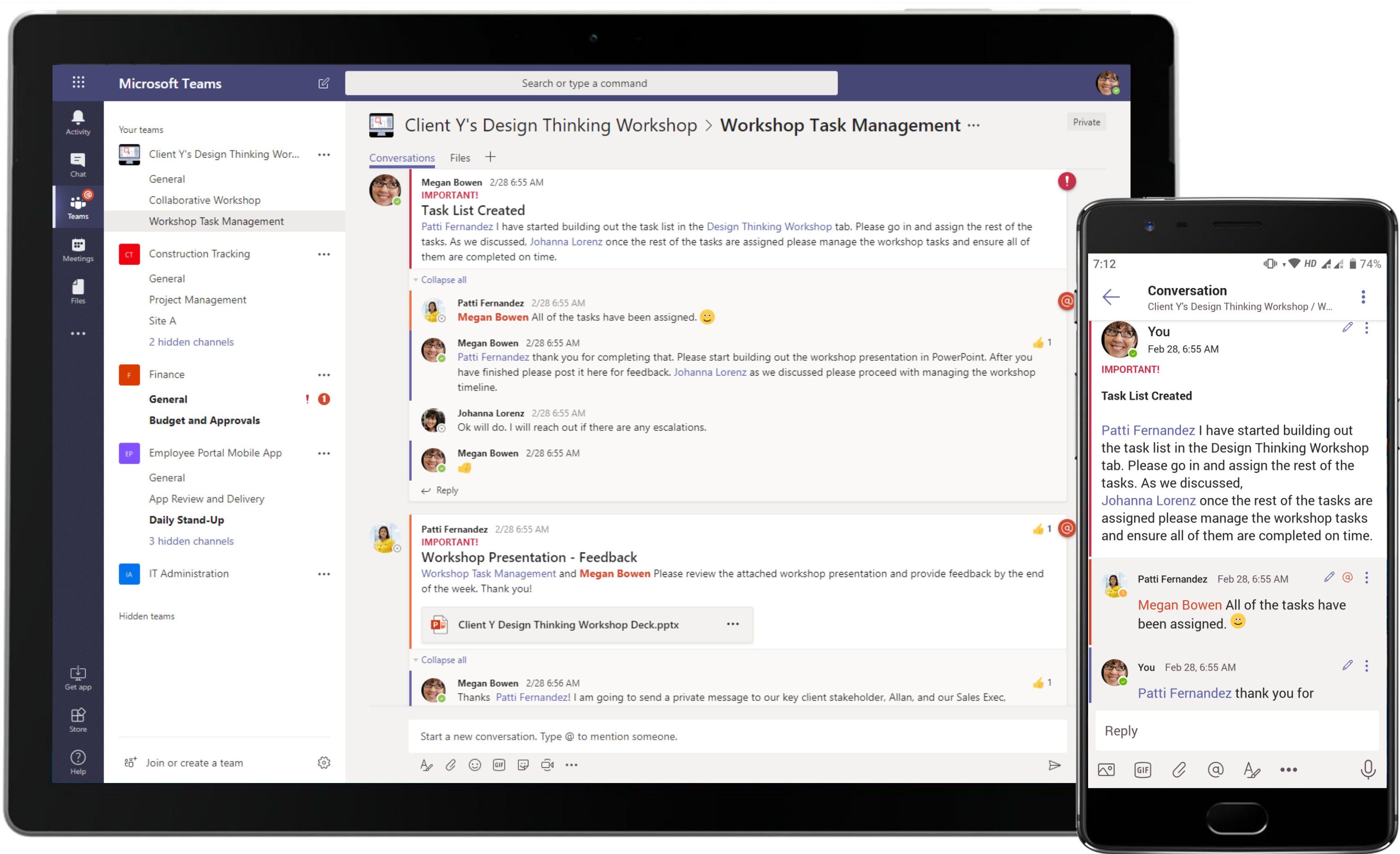
Find files you are looking for and share them with your team in minutes! The Delivery Manager uses Zoom.ai within Teams to track down an infographic for workshop attendees.



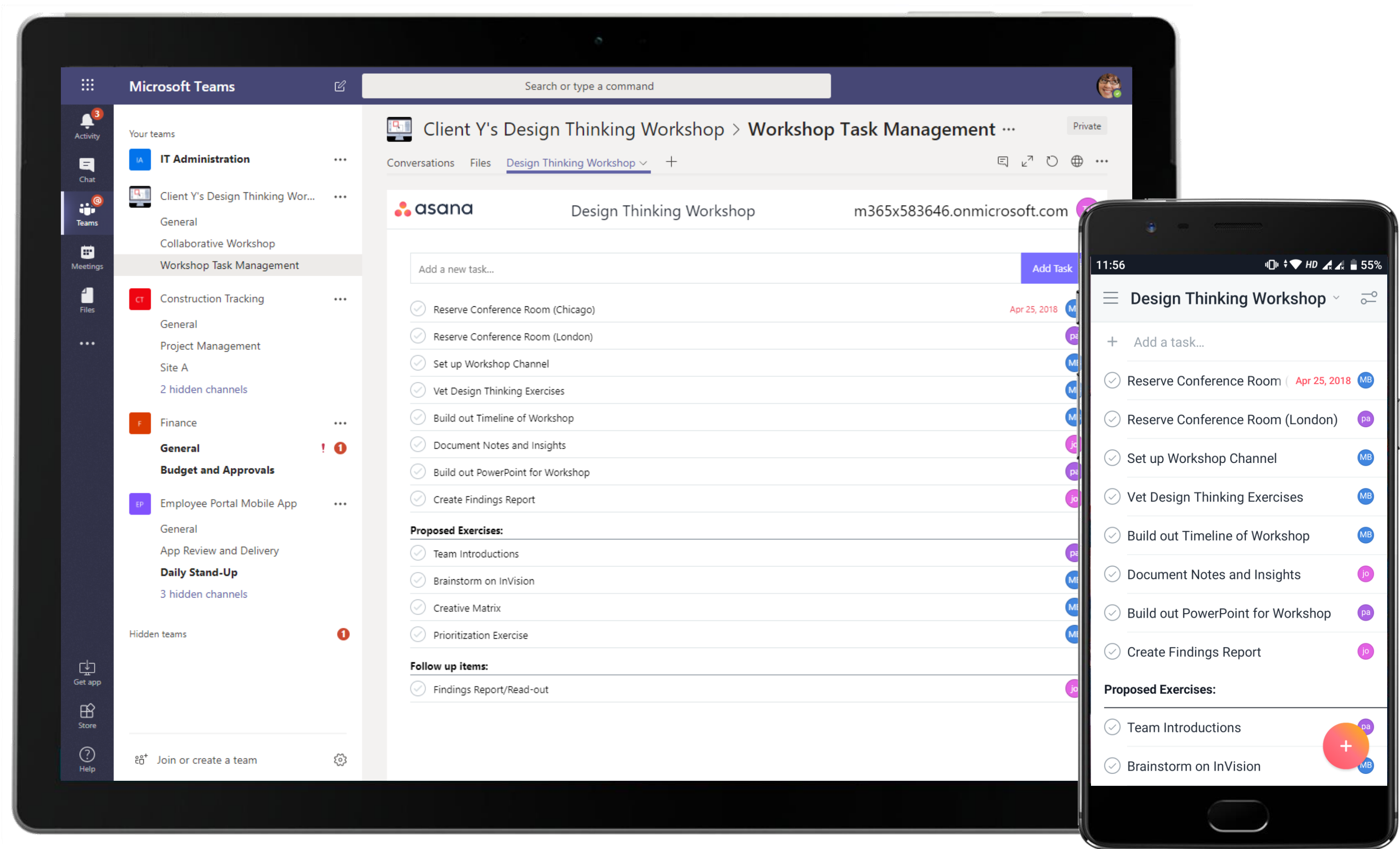
Brainstorm and collaborate on a virtual whiteboard right in Microsoft Teams with Lucidspark.
The Delivery Manager uses a Lucidspark to sketch ideas with her team.



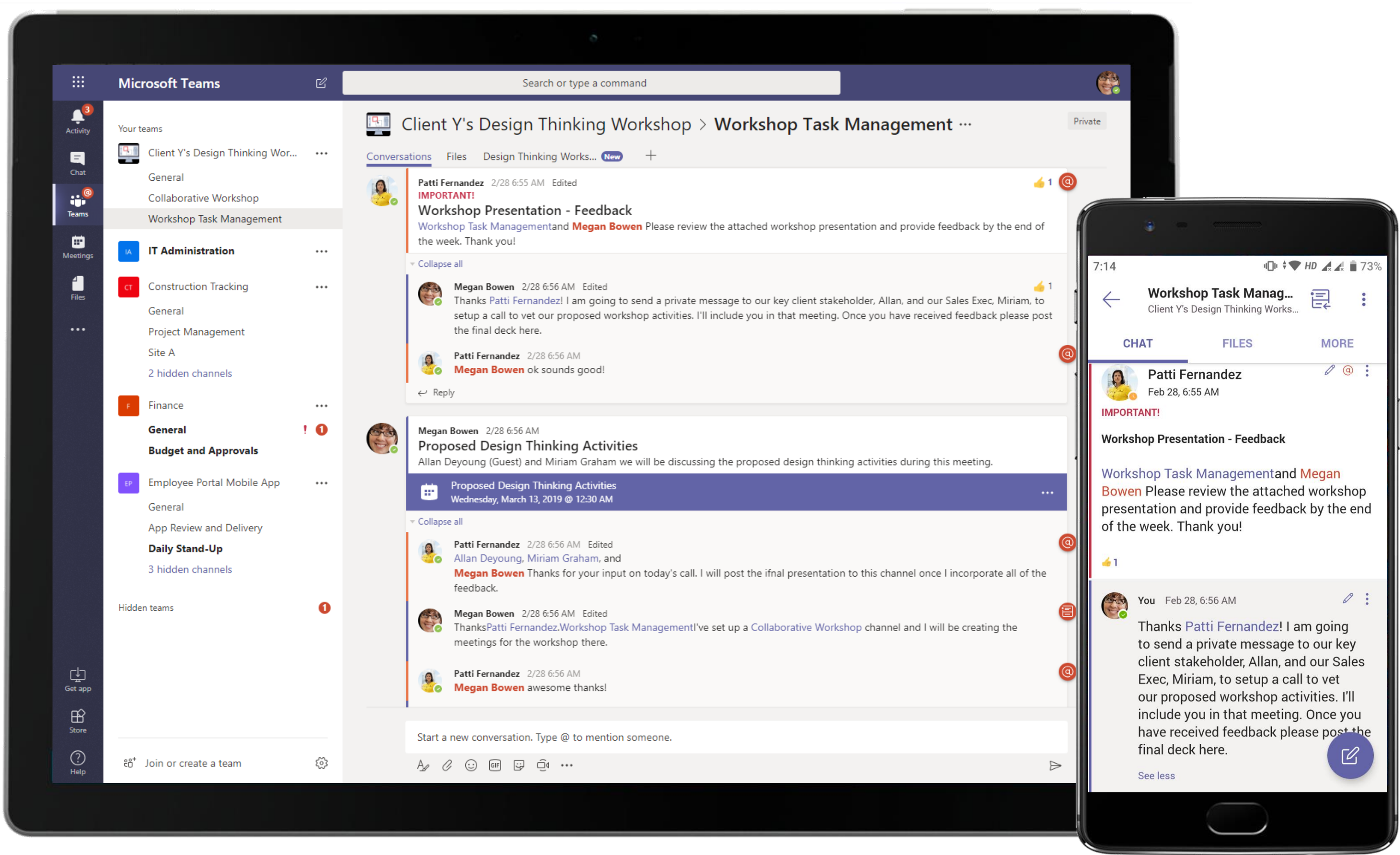
To close out the meeting, collaborative note capturing with OneNote in Microsoft Teams allows the Manager to document all the information about the workshop in a OneNote tab pinned within the channel.



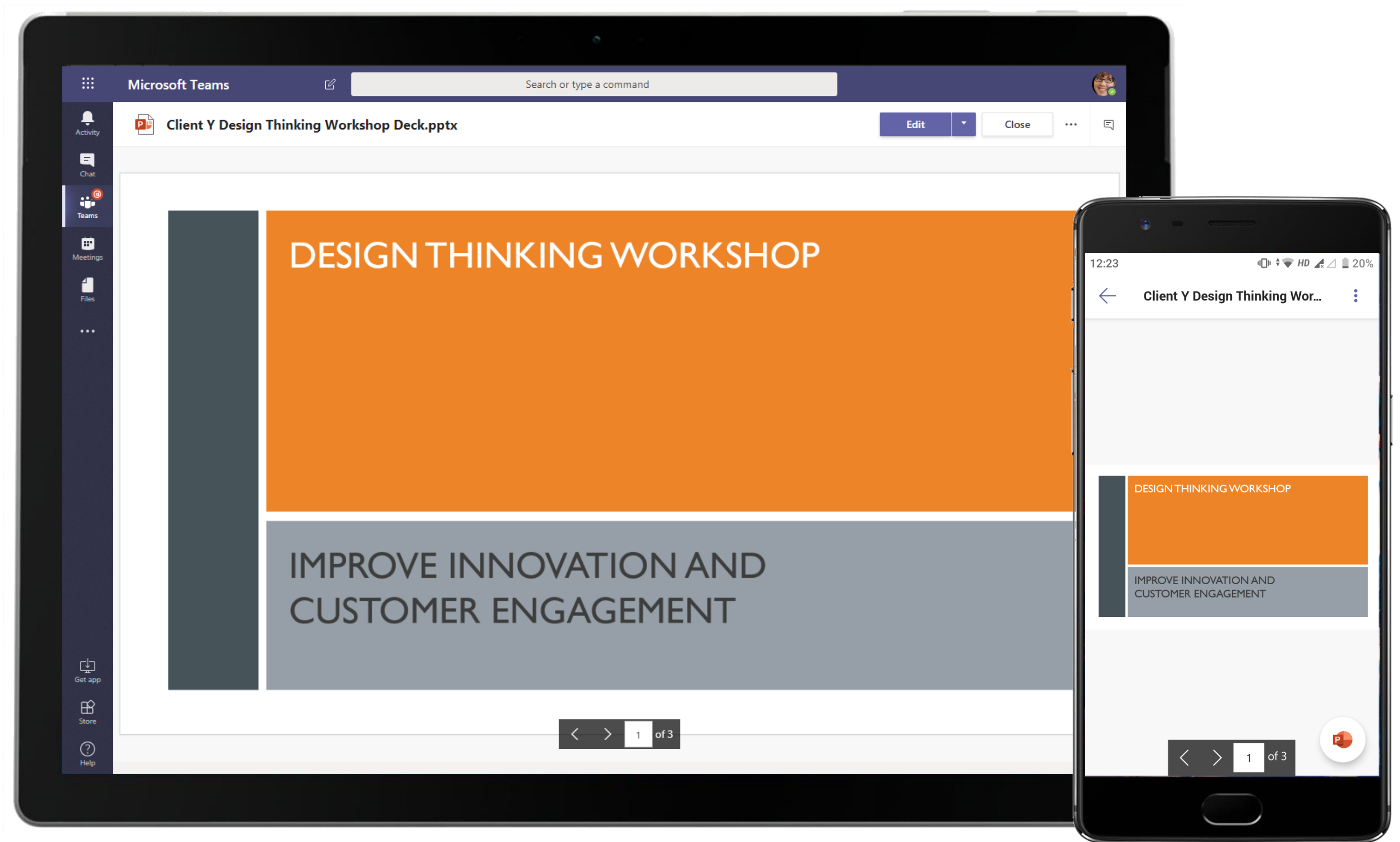
Channel conversations keep team members in sync with each other. Files shared in conversations enable structured, data-driven discussions and decision making such as task lists and workshop presentation in this case.



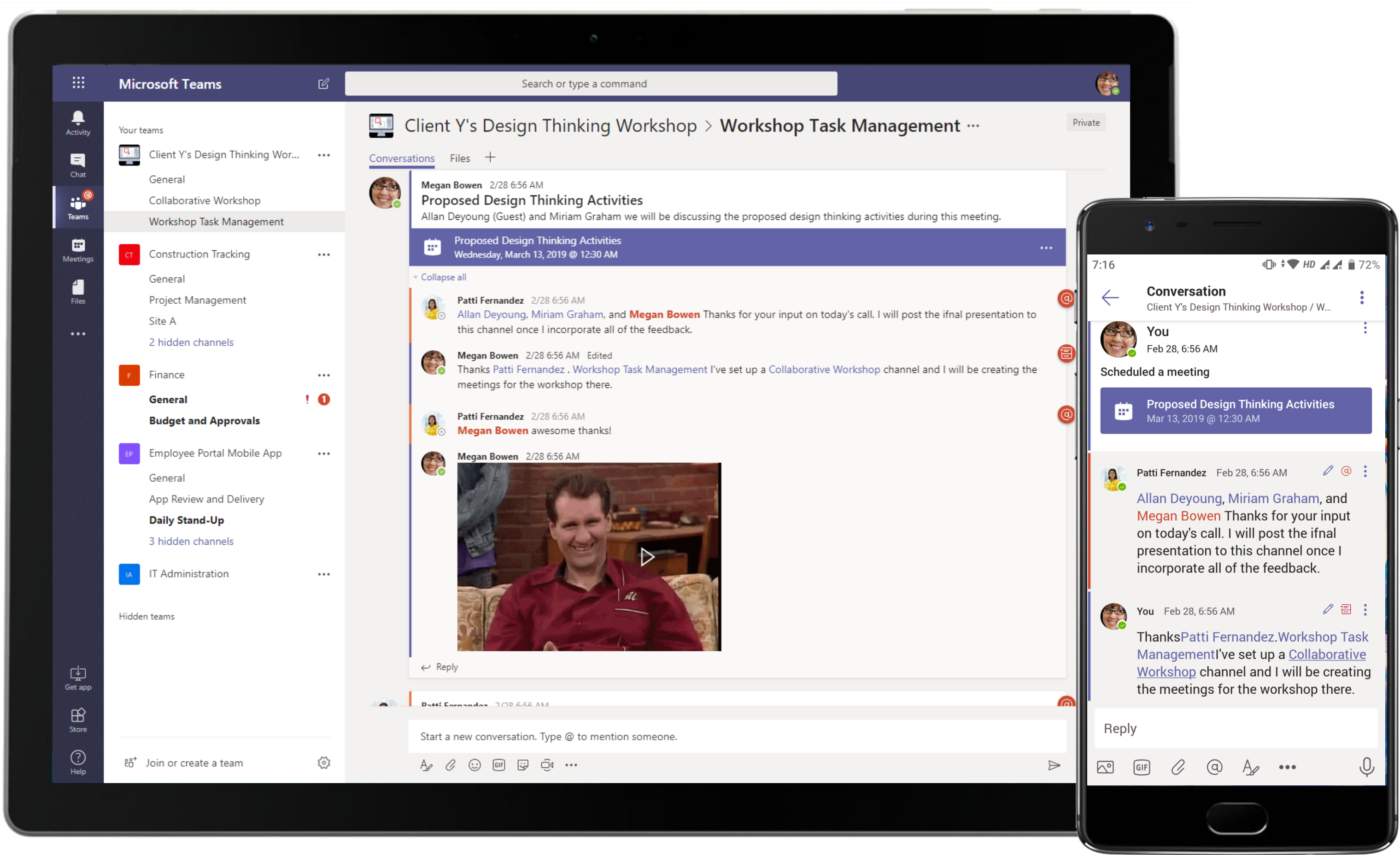
Create assignments for team members using the connected Asana app in Microsoft Teams.
An Asana task board is set up and a Senior Consultant is tasked with task management.



Microsoft Teams conversations are threaded so users can reply directly in-context to specific conversations, while keeping relevant discussions and meeting threads grouped together. Files can be attached or referenced in these conversations as well.



Present ideas and training material to team members with PowerPoint. Team members can also edit this presentation shared by the Project Lead and customize it on the go.



Microsoft Teams enables transparent communications through channel conversations. The team members communicate in open-channel conversations and keep each other up-to-date.



Documentation and Post-Workshop Feedback

Delivery Manager

Scenario Walkthrough

The stage has been set for Contoso's Design Thinking Workshop for their Client Y. The Delivery Manager and her team now has to work in tandem to review workshop feedback real-time. They use the collaborative Microsoft Teams platform for documentation and post-workshop feedback.

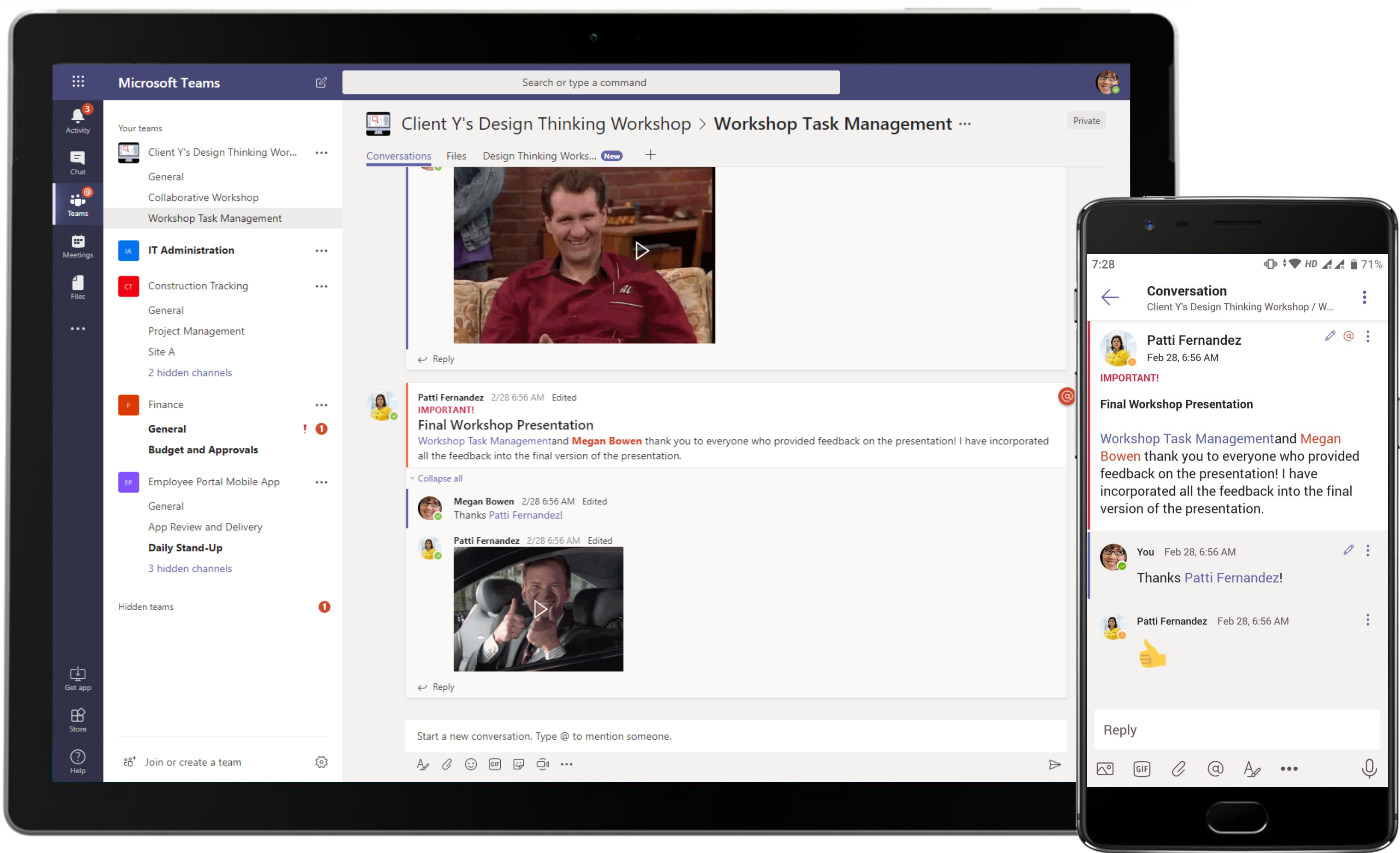
- Reviews final PowerPoint presentation built by the team for the workshop.
- Schedules a meeting to analyse progress and roadblocks in the workshop.
- Shares a design thinking exercise board built using MURAL in the meeting thread.
- Senior Consultant shares an audio recording of the workshop, documenting it the Files tab for future reference.
- Compiles results of a workshop feedback survey by the Project Lead in Excel.

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

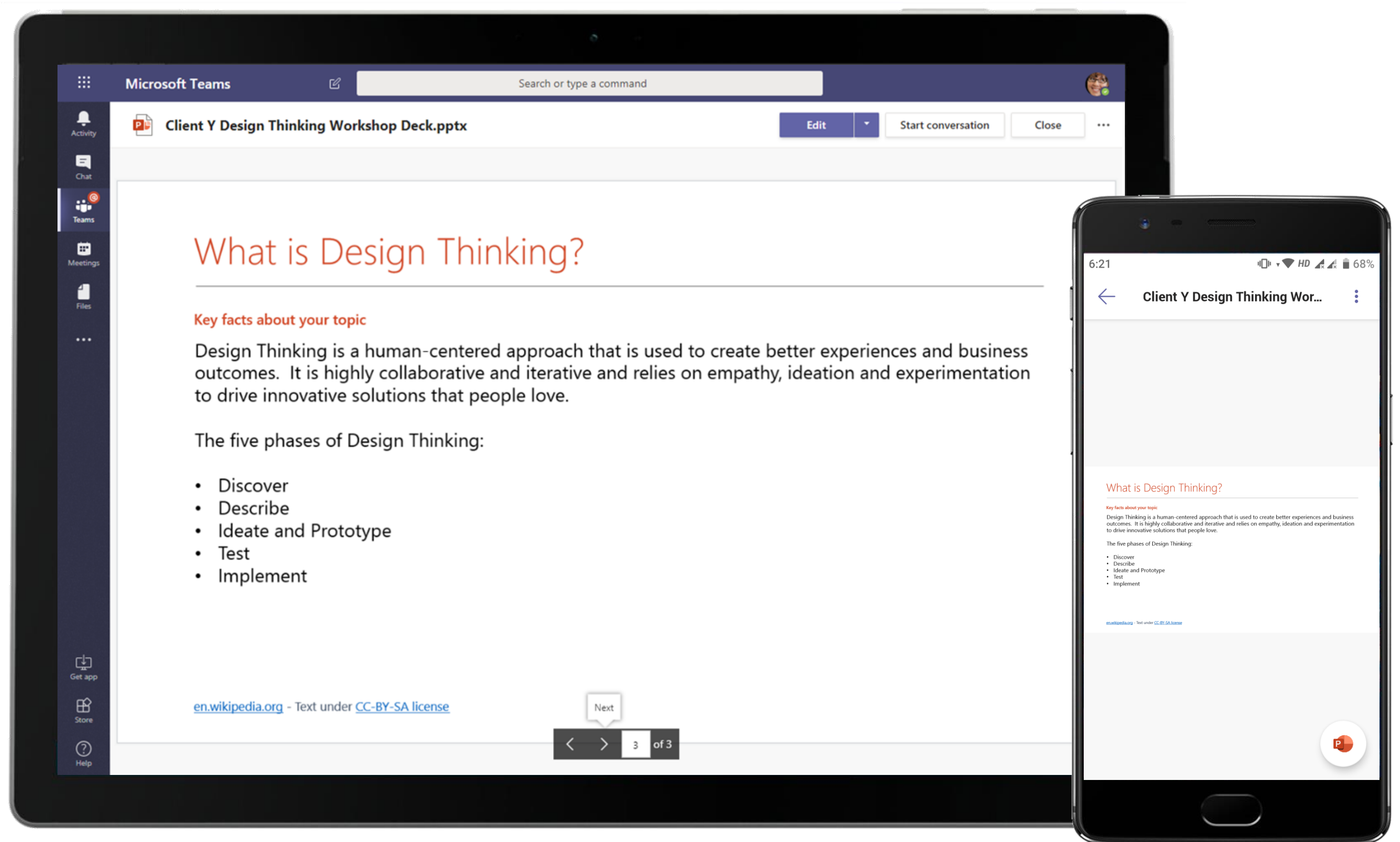
- Seamlessly coordinate with team members to get several business-critical tasks completed as per the client's requirements.
- Brainstorm, ideate and collaborate using the MURAL app in real-time during meetings with your team.
- Analyze data and create visual summaries with Excel in Microsoft Teams.
- Create and share presentations that stand out with PowerPoint.

Which app integrations on Teams made it possible?

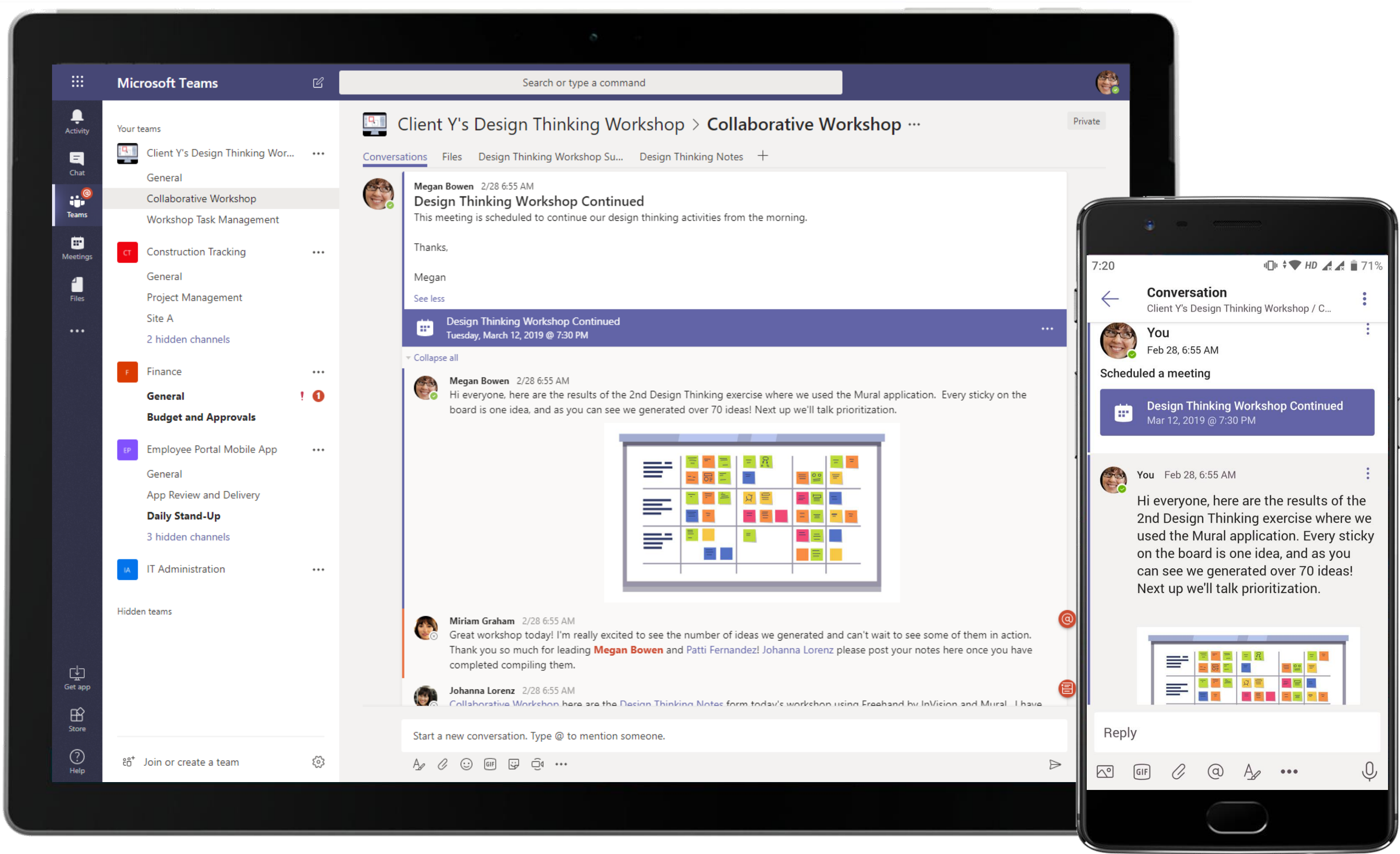




Relying on channel conversations to work with each other, team members quickly rally together to build the workshop presentation.



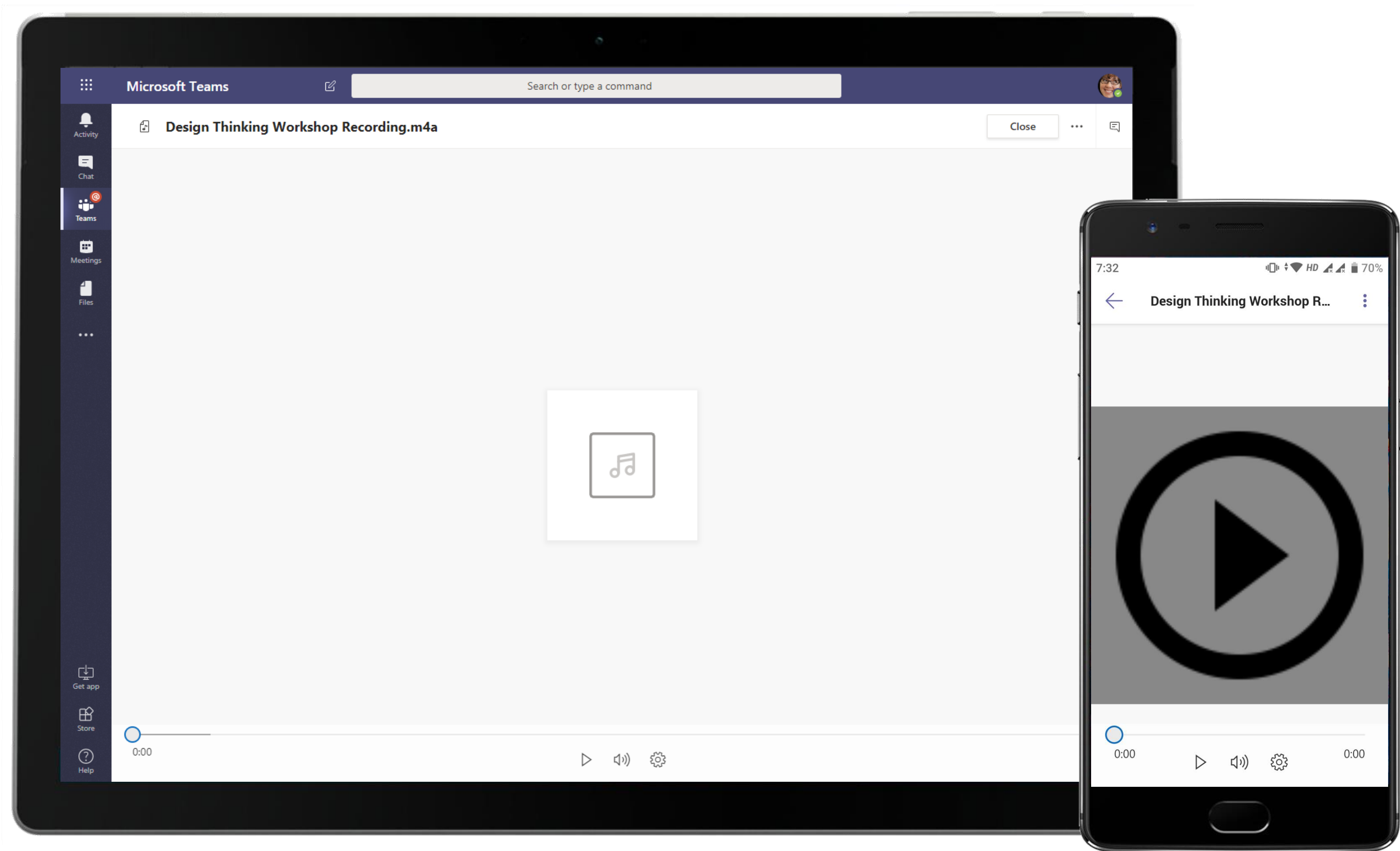
Edit your presentation and customize it on the go, collaborating with others in real time within Teams. The Delivery Manager reviews the final PowerPoint presentation built by the team for the workshop.



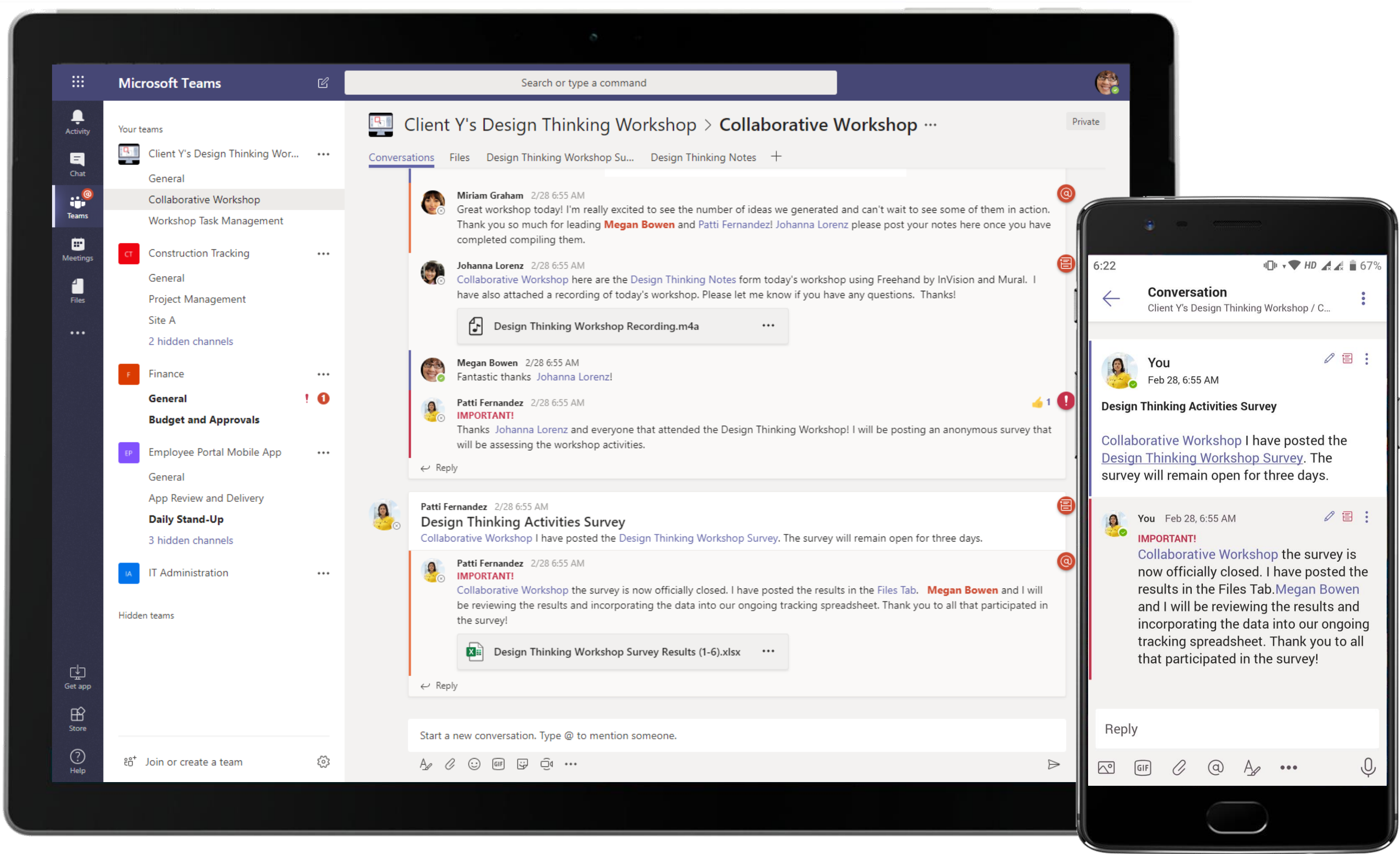
Microsoft Teams seamlessly blends 3rd-party apps within its interface. The Delivery Manager shares a design thinking exercise board built using MURAL in the meeting thread.



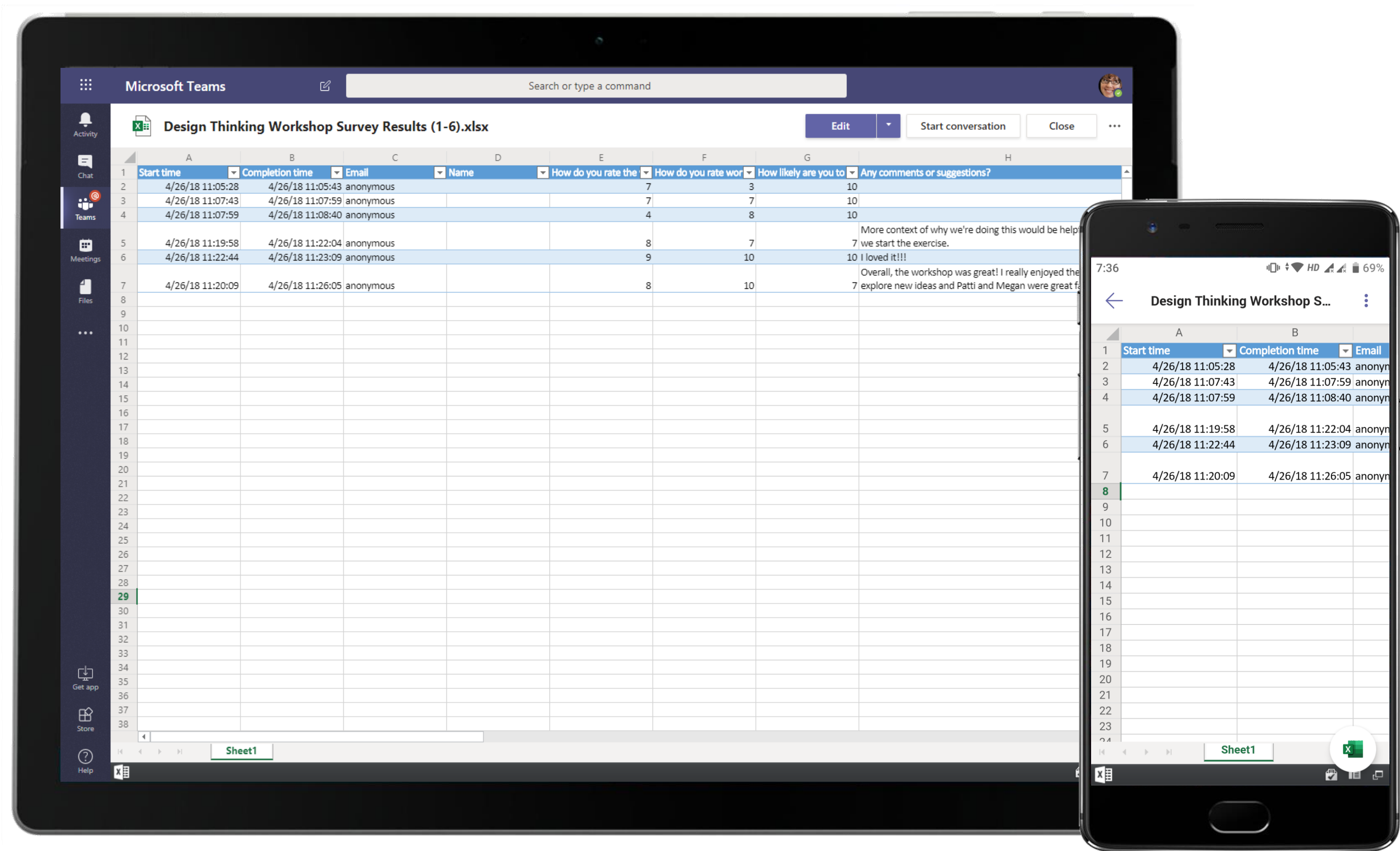
Brainstorm, ideate, and collaborate on MURAL during meetings and discussions with your team. Save brainstorm output as an image within the channel for the team's reference.



House important files in a protected cloud repository with Files. A Senior Consultant shares an audio recording of the workshop, documenting it the Files tab for future reference.



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



A post event feedback is collated using Excel and shared with the Delivery Manager for her review to close out and complete the workshop coordination.



Project Management and Delivery

Check out how Project Analysts, Project Leads and Delivery Managers can use Microsoft Teams to keep business operations running efficiently and address unexpected situations with confidence.

Project Management and Delivery 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 securely collaborate with teammates on multiple projects from within a single environment

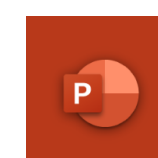
Apps that enable an immersive experience in Teams



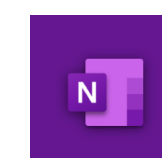
Word



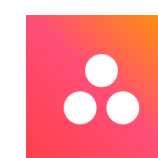
Excel



PowerPoint



OneNote



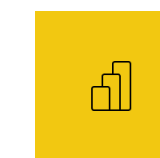
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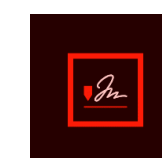
Smartsheet



Presentations
AI



Teamwork



Adobe
Sign



Tasks by
Planner
and To Do



Communities

Meet the Business Decision Makers

Project Management and Delivery



Project Lead

"Communication is a skill that you can learn. It's like riding a bicycle or typing - if you are willing to work at it, you can rapidly improve."

- Communicate and collaborate with the delivery team to coordinate DevOps related activities
- Ensure solution being developed is consistent with client, industry needs
- Front line for resolving process issues



Project and Delivery Lead

"You build on failures. You use it as a stepping stone. Close the door on the past. You don't let it have any of your energy."

- Lead the collaborative and dynamic planning process
- Ensure all services are built to an appropriate level of quality
- Deliver analytical solution by coordinating various stakeholders
- Build solution roadmaps for projects



Analyst

"A company can seize extraordinary opportunities only if it is very good at the ordinary operations."

- Work with senior stakeholders to compile data and reports
- Ensure all legal and regulatory documents are filed and monitor compliance with laws and regulations
- Identify and address problems and opportunities for the company



Establishing Teamwork with a Plan

Project Lead

Scenario Walkthrough

Contoso has a new project for Client Z that requires part of the team to work at the client's premises in Detroit, Michigan. The remaining team is spread across multiple locations, from Seattle, Washington to New Delhi, India. Planning and managing a client engagement, while supporting services for multiple vendors from a variety of specialized consulting organizations is no small feat. The Project Lead works with the Project and Delivery Lead and their global team to onboard employees and coordinate efforts across different time zones for the new project.

- Posts a welcome message in the channel and posts a step-by-step onboarding process for team members.
- Shares a YouTube information security video and other project documents including NDAs and background verification to be filed with the Delivery Lead.
- Uploads delivery documents such as the SOW and Staffing Plan in an exclusive channel.
- Shares a project plan with the team and walks them through the plan over a project kick-off call.

How did Teams help the Project Lead execute her roles and responsibilities?

- Ease of project planning using Trello.
- Create impactful summaries of data using Excel.
- Powerful document creation and sharing with integrated apps like Word and PDF.
- Present your information and data in a dynamic visual manner with PowerPoint.

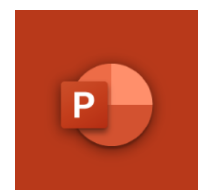
Which app integrations on Teams made it possible?



Word



Excel



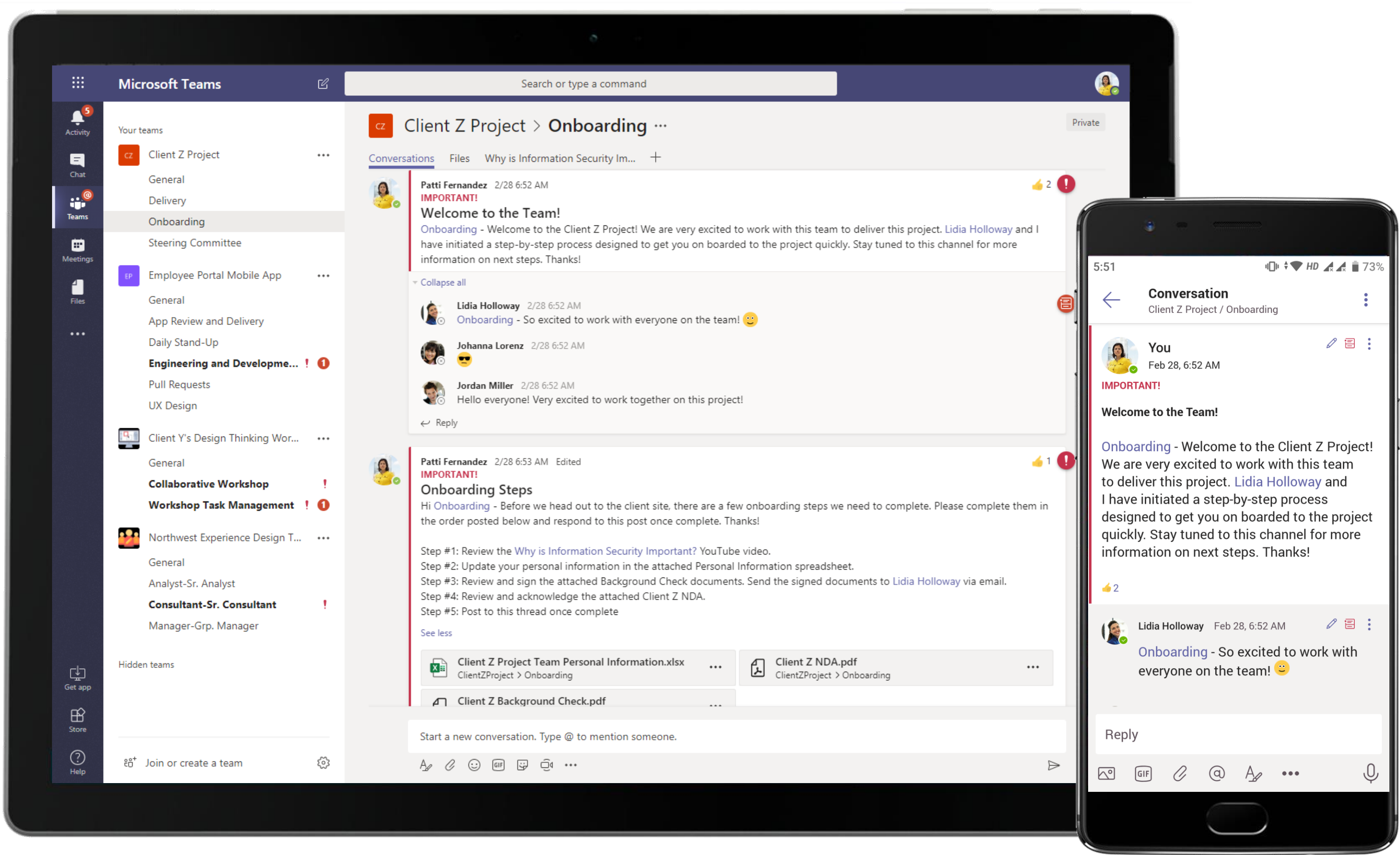
PowerPoint



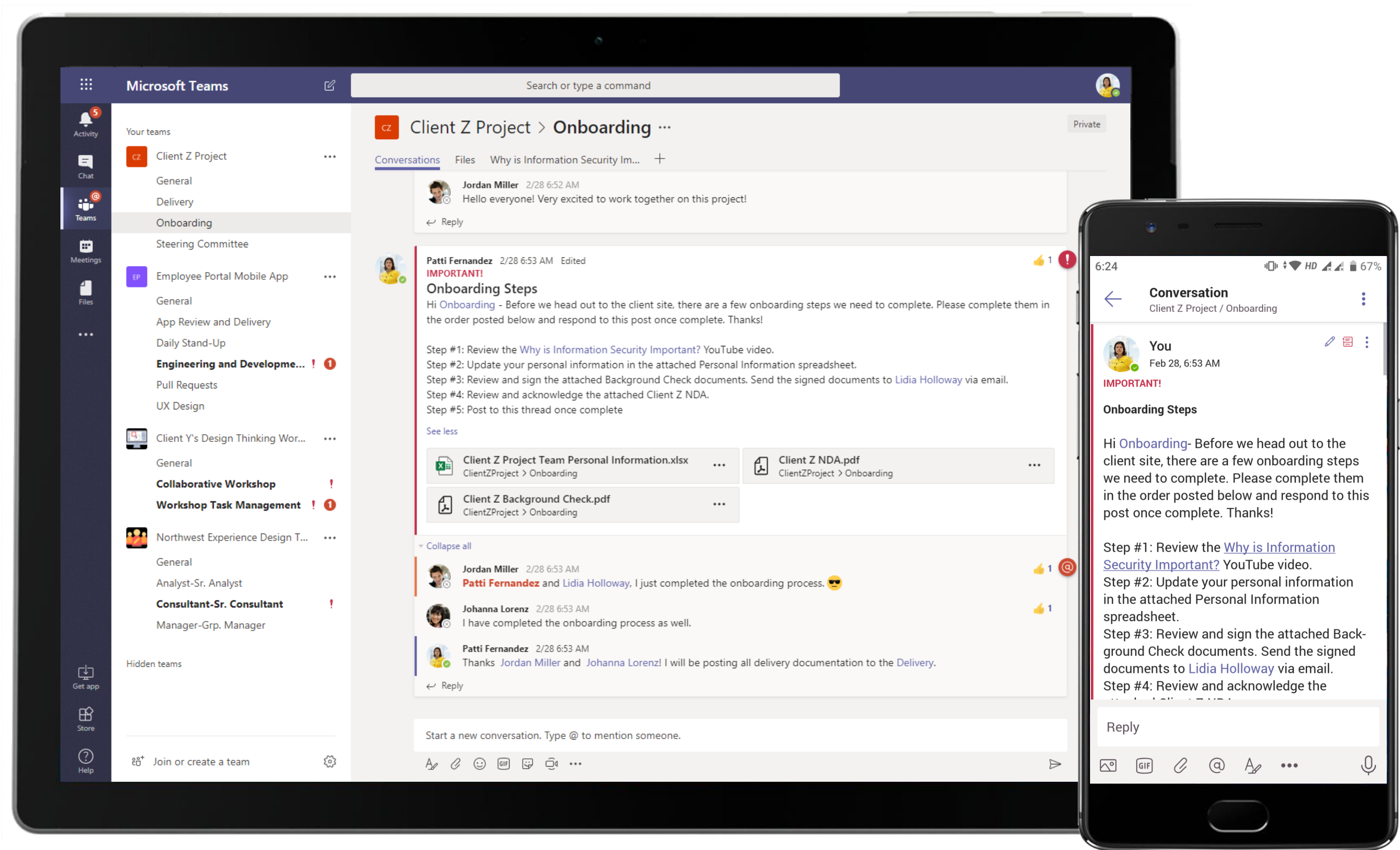
PDF



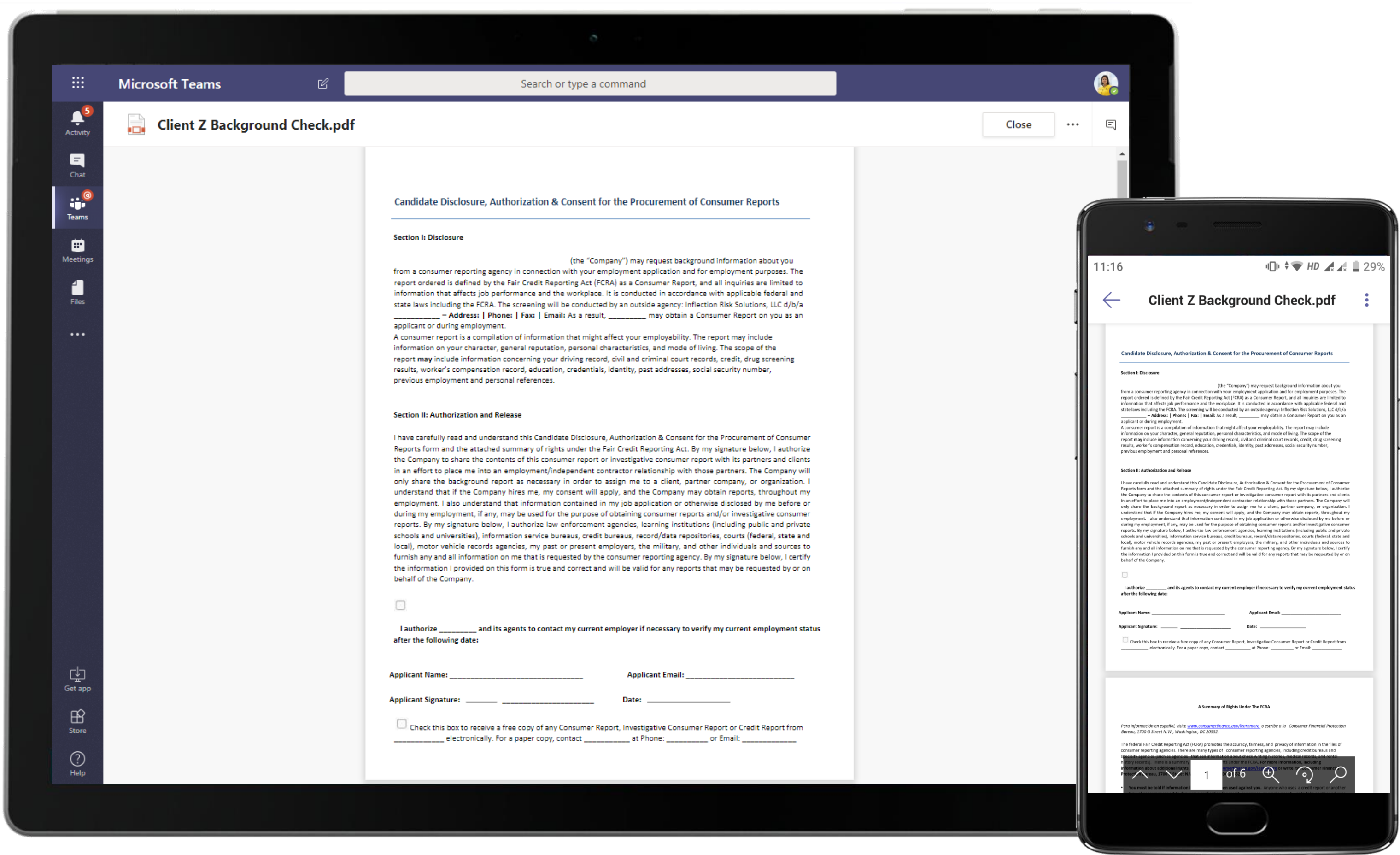
Trello



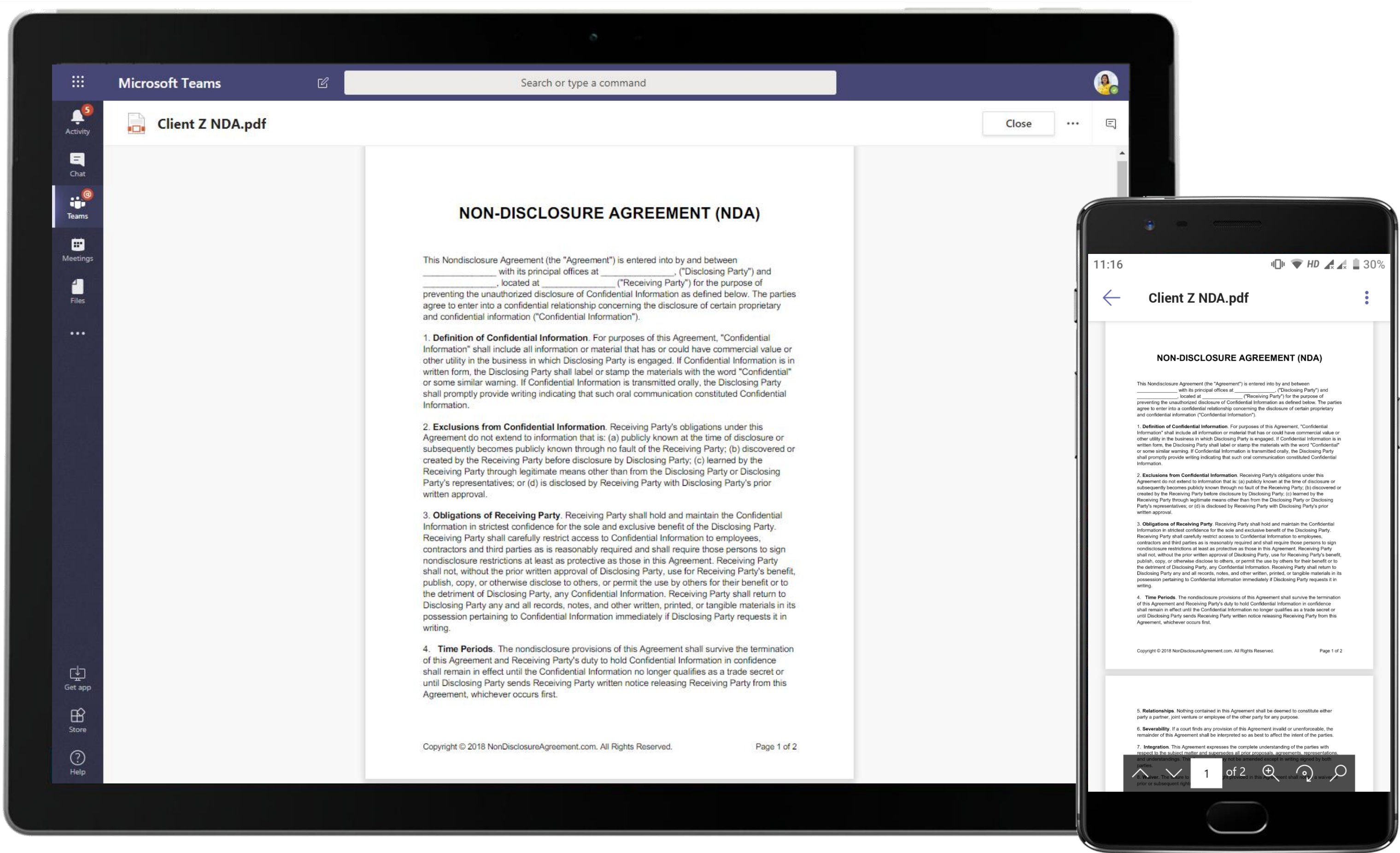
Begin new conversation threads and post announcements/updates to team members. The Project Lead begins a new conversation thread to onboard team members working out of different time zones to deliver the project.



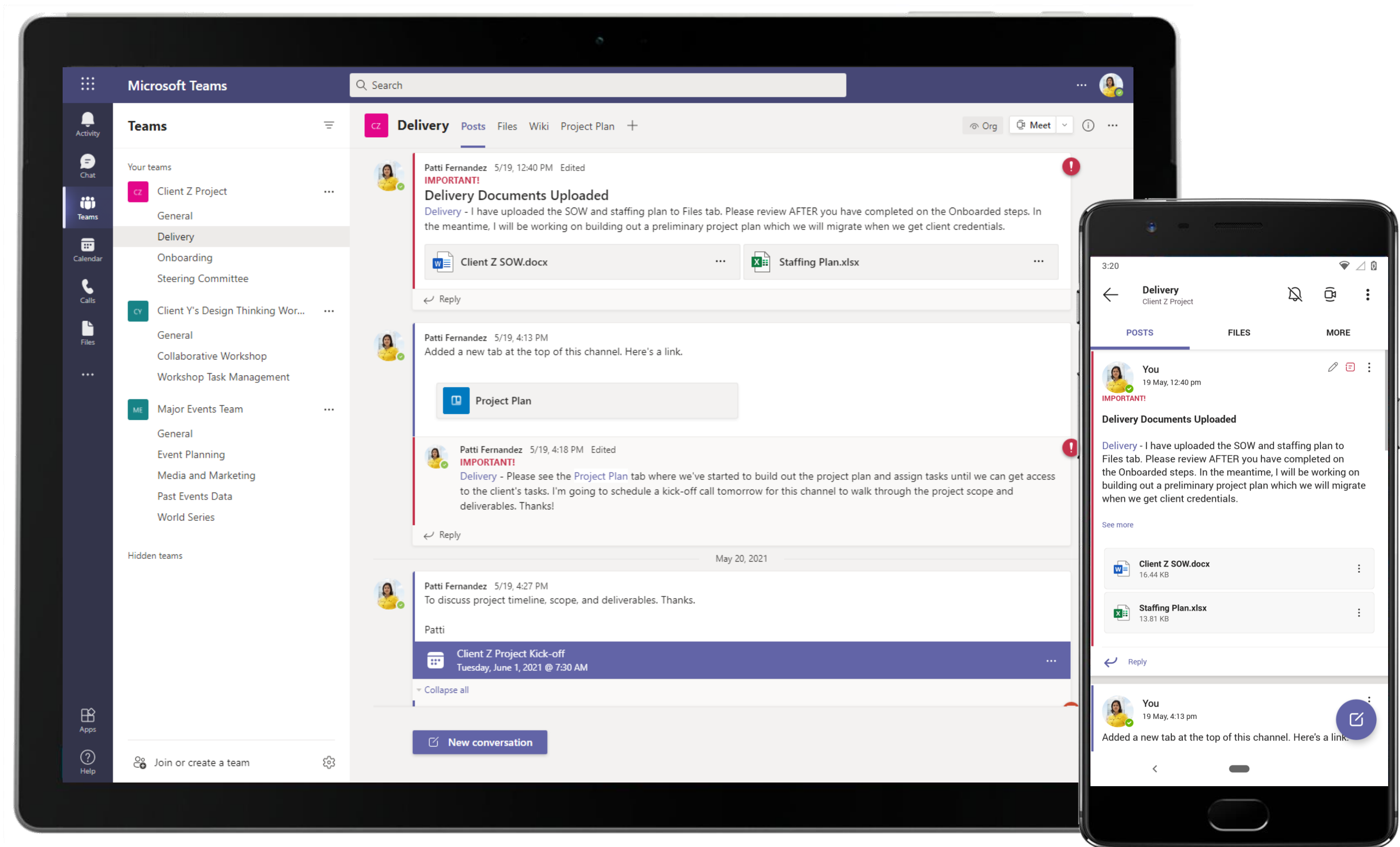
Channels are a great place for discussions, meetings, sharing files and even for onboarding, in this case. The Project Lead shares clear, detailed onboarding steps for the team and eases the process.



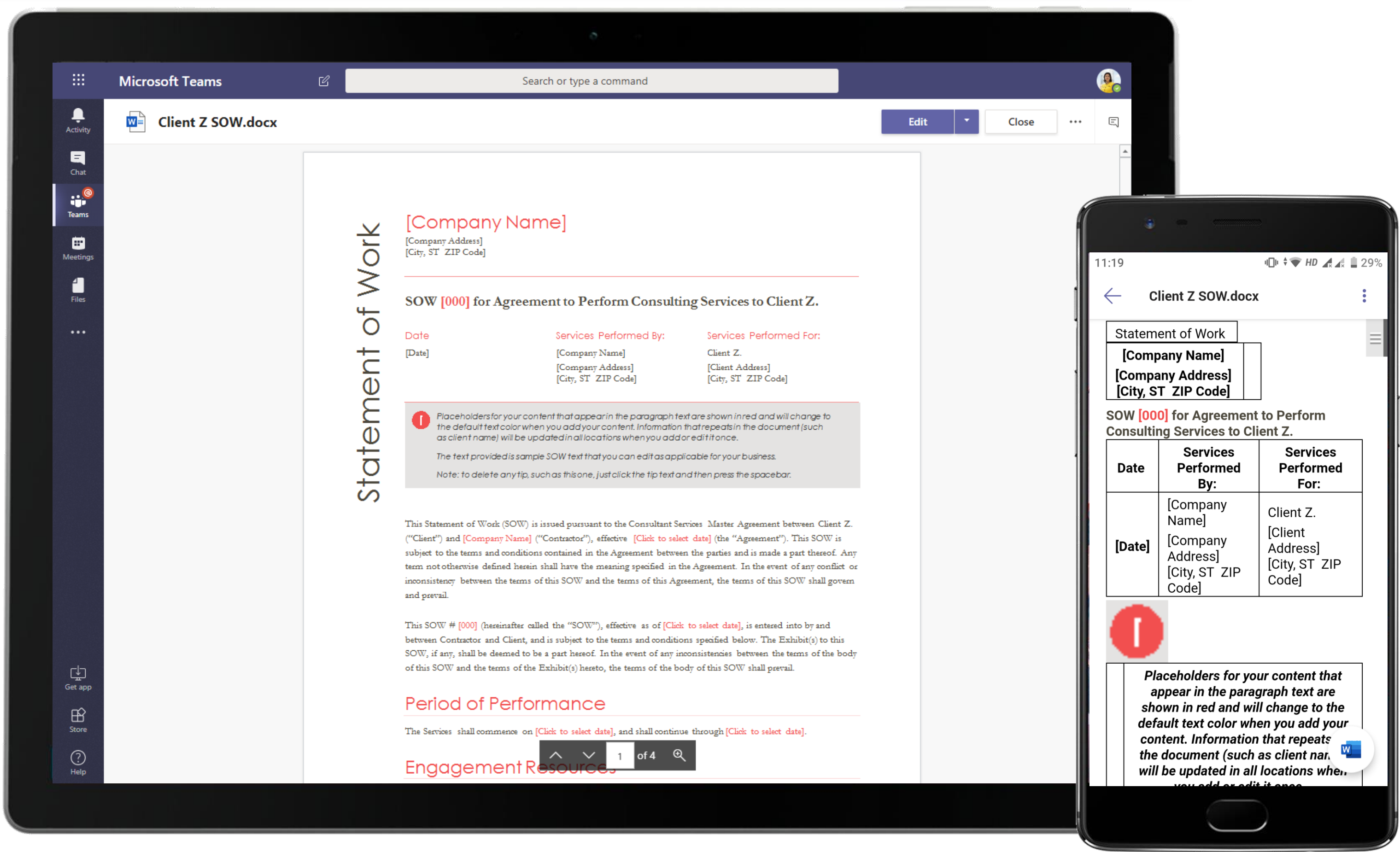
Onboarding includes signing non-disclosure agreements. This process is, once again, eased by the protected file sharing capabilities of Microsoft Teams, where team members can quickly access the forms needed from the Files tab.



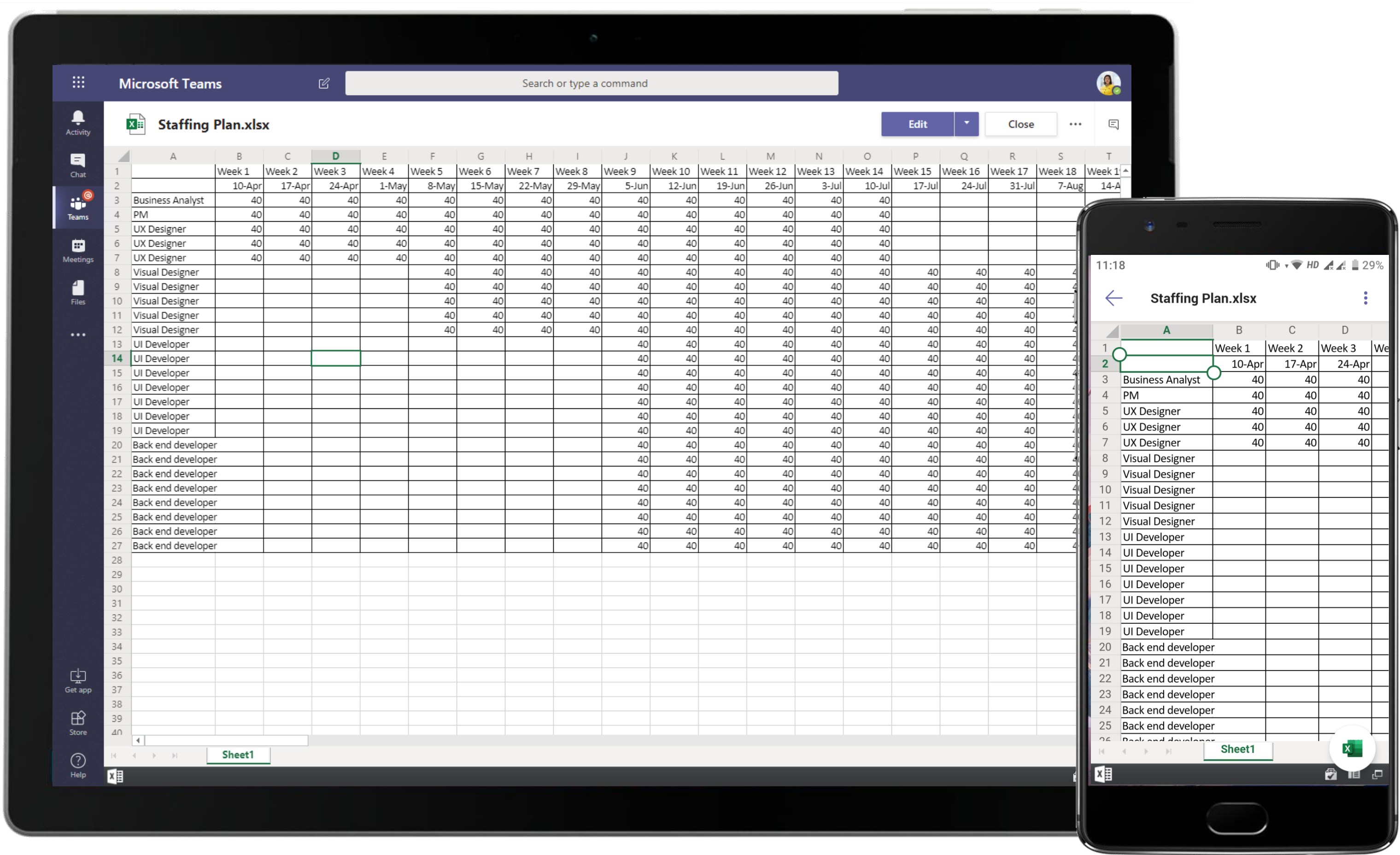
Onboarding includes signing non-disclosure agreements. This process is, once again, eased by the protected file sharing capabilities of Microsoft Teams, where team members can quickly access the forms needed from the Files tab.



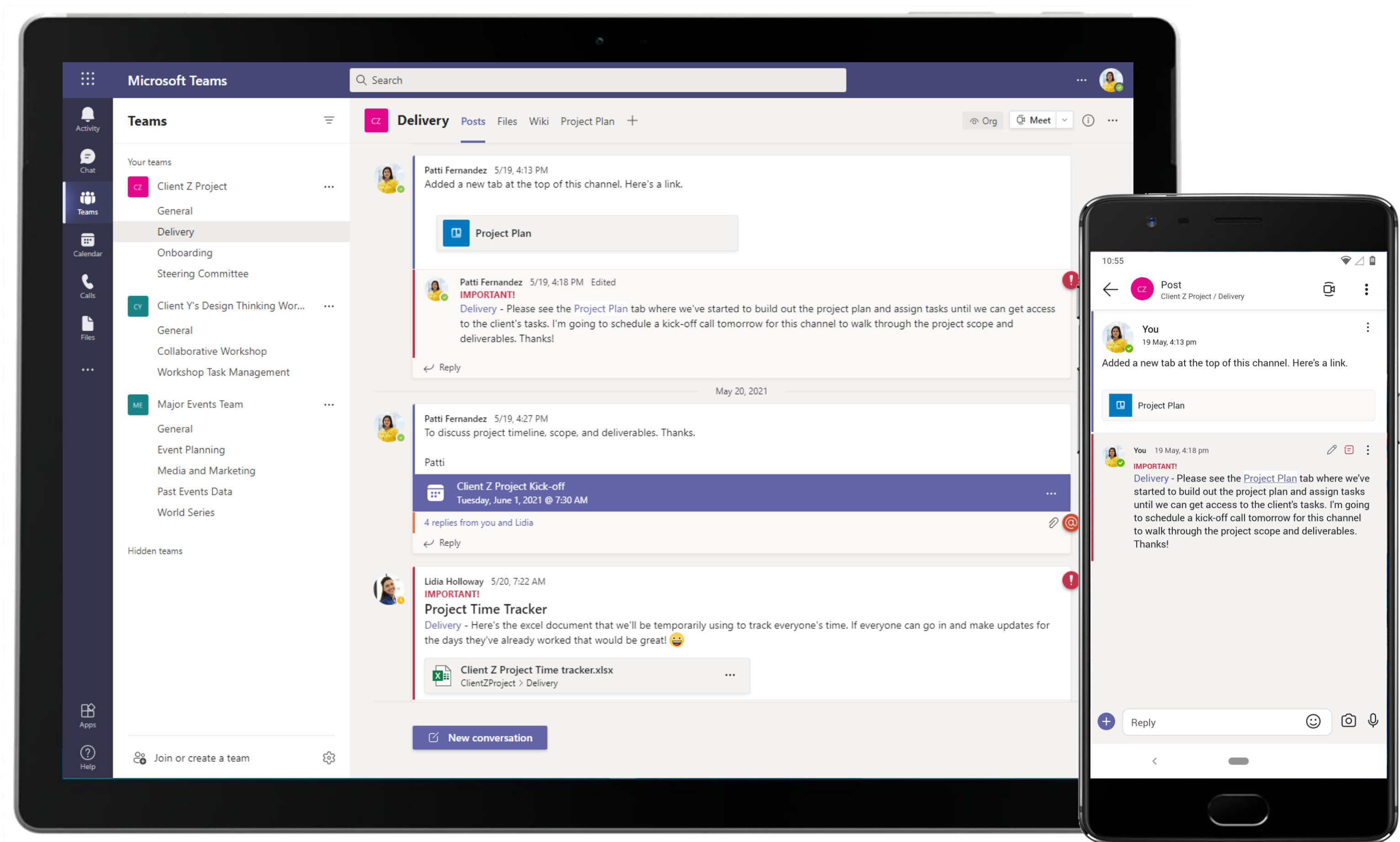
The Delivery channel houses everything the team needs to get started and on the road to the project – from delivery documents to project plan to kick-off meeting threads!



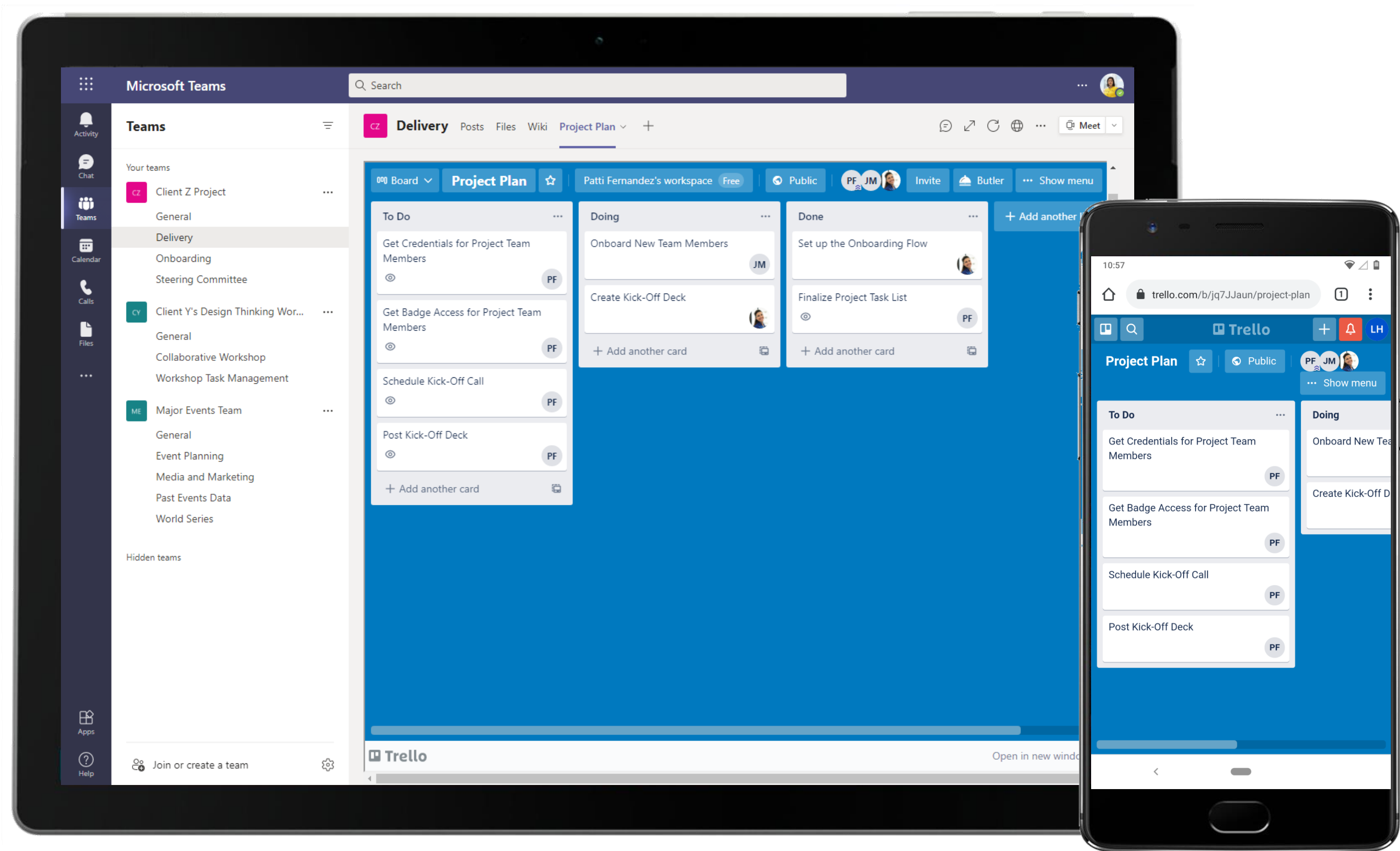
Easy access to documents and templates within relevant channels using Word app integrated into Teams allows the Project Lead to share the SOW with team members working on the project.



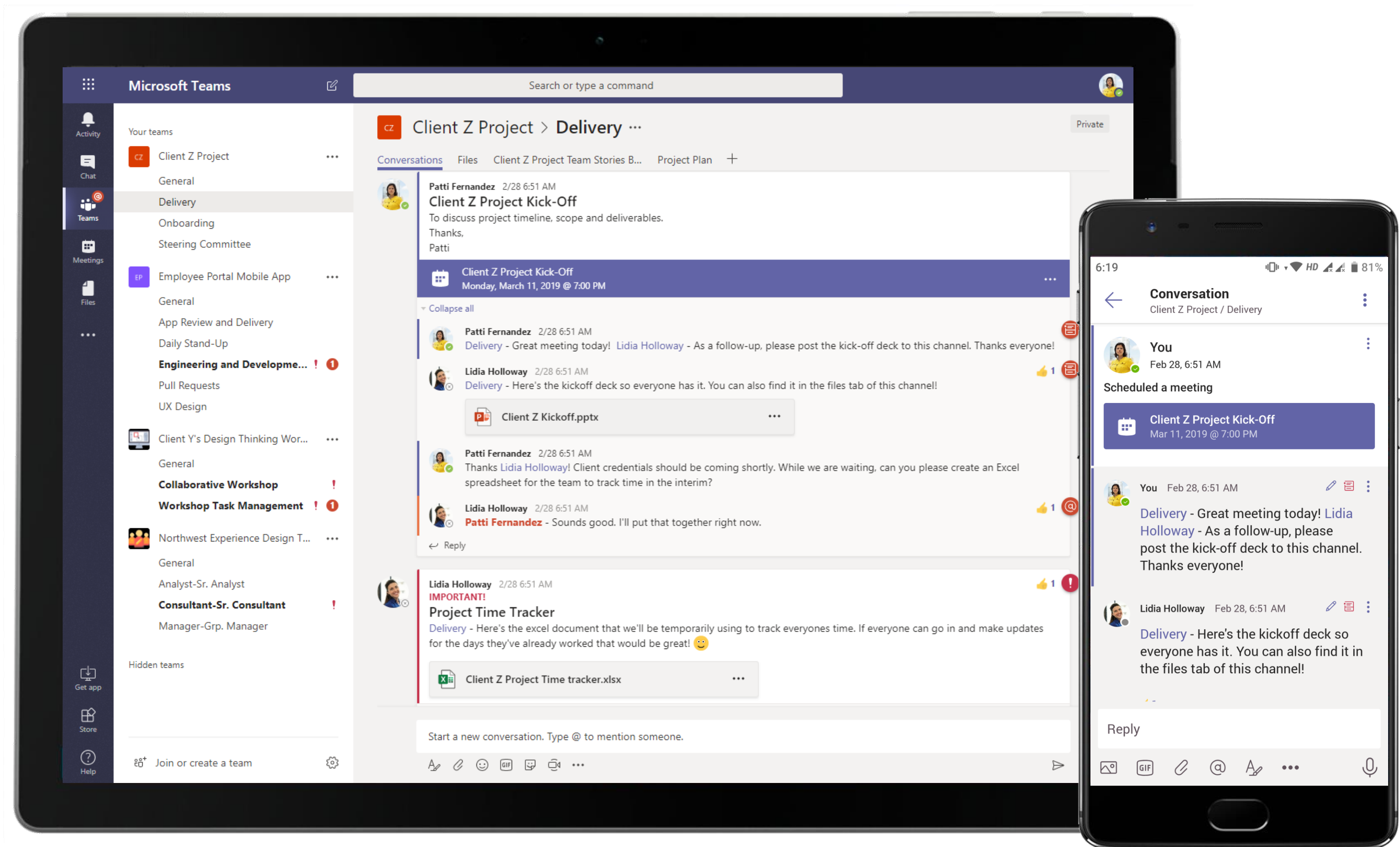
Create impactful summaries of crucial data with Excel, Word, and OneNote for Microsoft Teams. Excel in Microsoft Teams enables the Project Lead to execute and share a clearly defined, scalable staffing plan.



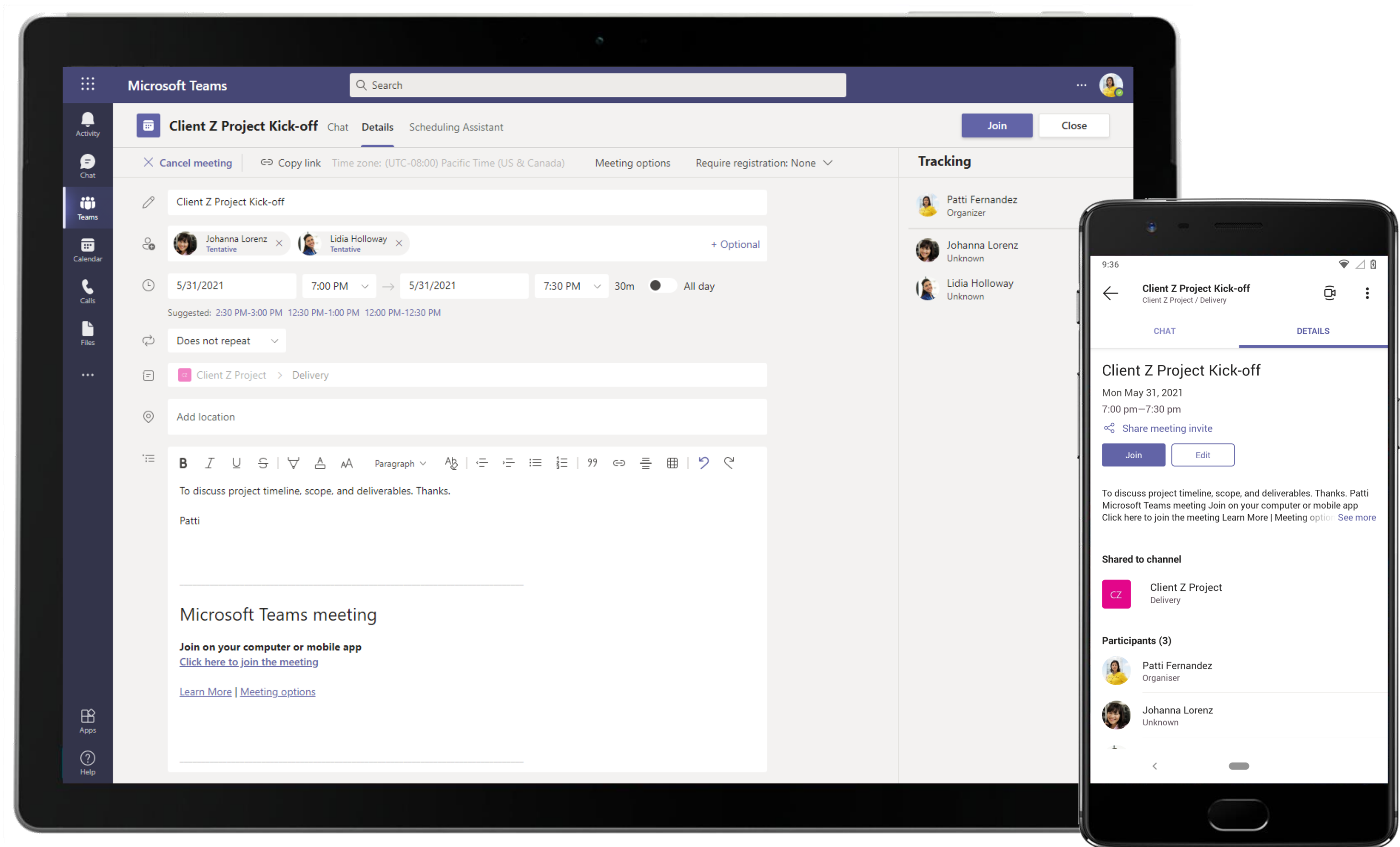
The Project Lead uses channel communication to keep her team apprised of the progress of the project. Channel conversations are a great way to keep your core team engaged for planning and disseminating information.



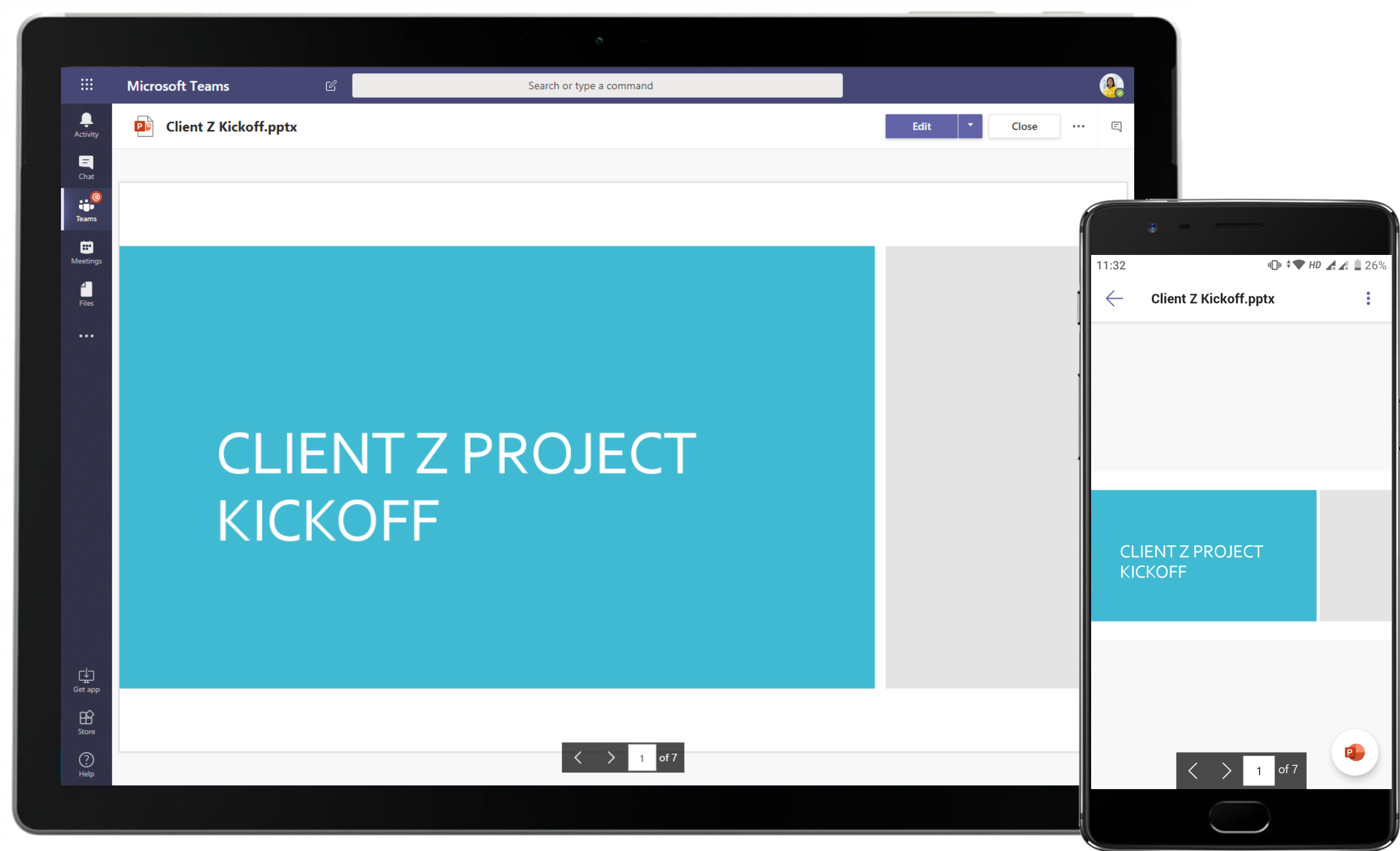
Organize tasks by adding one or more Trello tabs to a channel in Teams. This allows the Project Lead to keep track of the tasks assigned to each team member and follow-up on the progress for each task with ease through Teams.



Share your work and updates on action items from virtually anywhere using audio and video calling capabilities inside Teams. Communicate in open-channel conversations and keep team members up-to-date.



Meet with team members virtually anywhere, anytime and find the best available times for invitees through the native meeting scheduler experience available in Microsoft Teams calendar.



Edit your presentation and customize it on the go, collaborating with others in real time within Teams. Screen share your presentations during meetings.



Task Optimization and Presenting to the Steering Committee

Project and Delivery Lead

Scenario Walkthrough

Contoso's project for their Client Z has kicked-off. The Project and Delivery Lead has to work with the Project Lead to streamline several aspects of team communication and coordination and execute a presentation for the steering committee. Find out how the Project and Delivery Lead focuses on fixing task management and builds the presentation with the team's inputs.

- Creates an Excel spreadsheet to temporarily track time and posts the spreadsheet to the channel for team members to update their hours.
- Receives an update in the channel that client credentials have been created for team members working on the project.
- Creates a VSTS/Azure DevOps and Trello instance with a Kanban board in the channel for team to report task completion status.
- Delegates daily task maintenance to a Senior Consultant once the process is streamlined.
- Uses a Burndown chart in Azure DevOps to track estimates and timelines and builds a PowerPoint presentation for steering committee meet.
- Shares the presentation with the Project Lead for review and sets the stage for the meeting.

How did Teams help the Project and Delivery Lead execute her roles and responsibilities?

- Trello in Teams help keep the task list visible while acting as a checklist for operations.
- Integrated Office 365 applications like Excel and PowerPoint help efficient collaboration.
- Search, find work and collaborate better with your team with Azure DevOps.

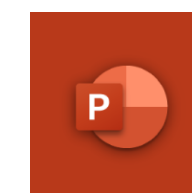
Which app integrations on Teams made it possible?



Trello



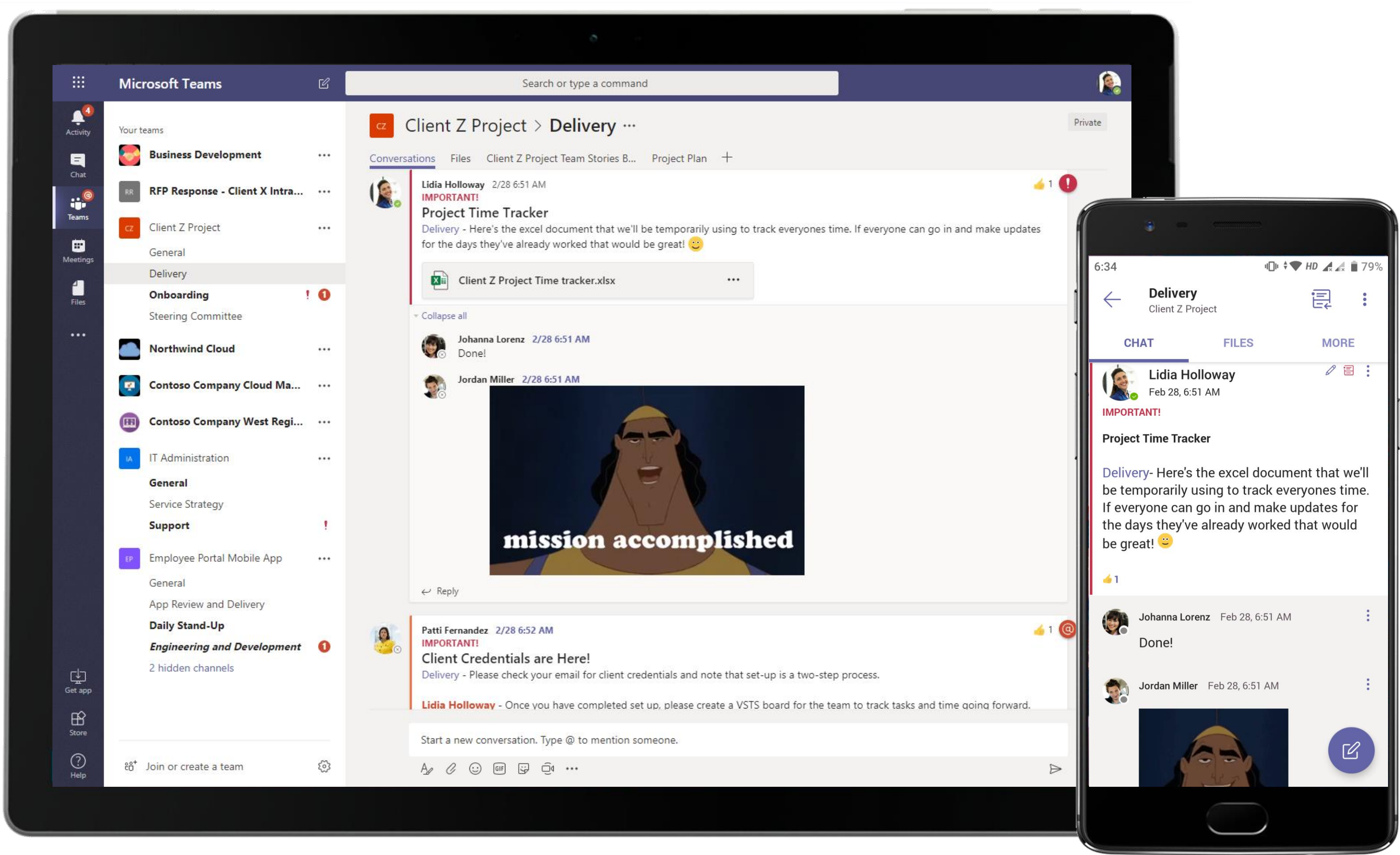
Excel



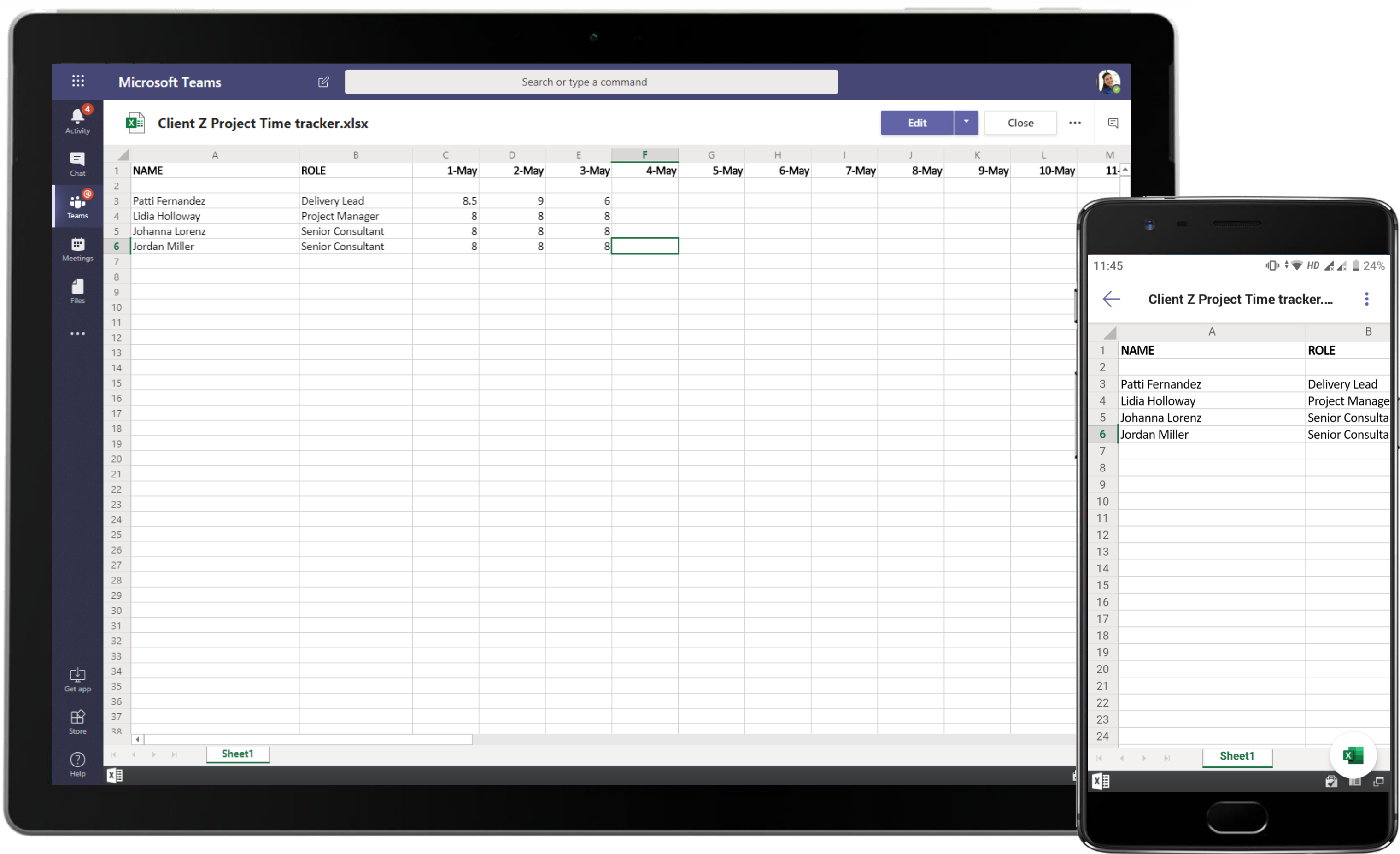
PowerPoint



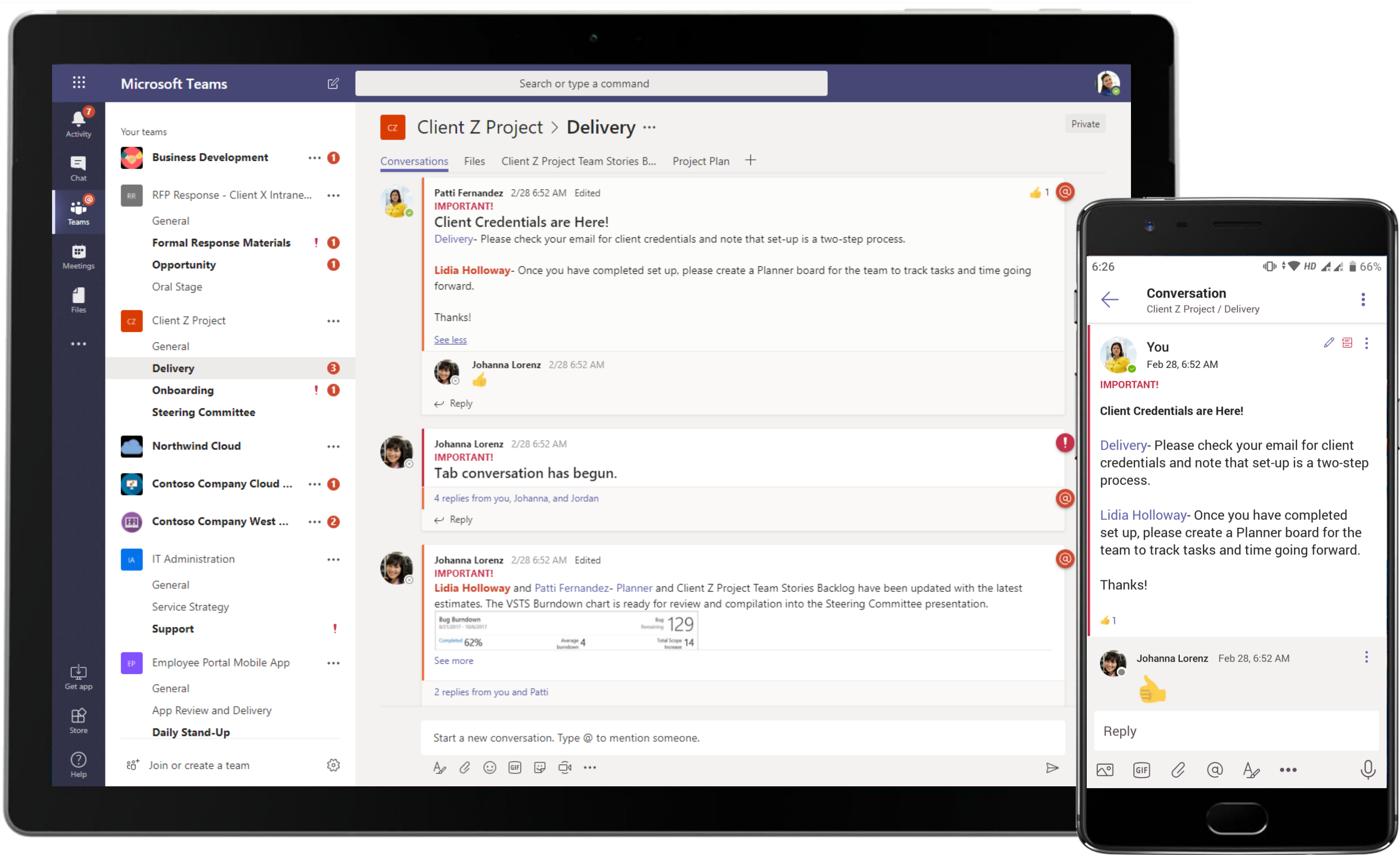
Azure
DevOps



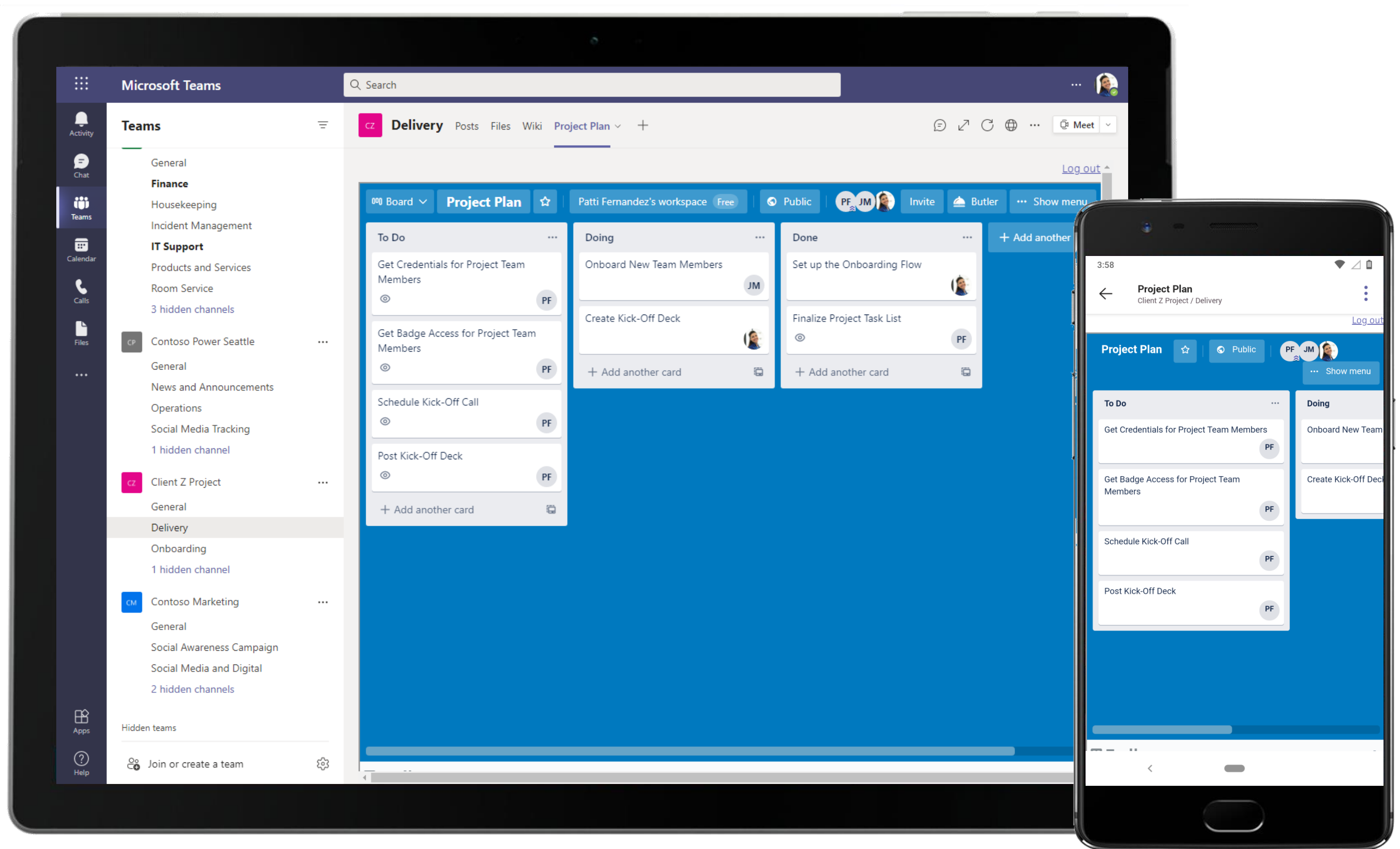
Microsoft Teams conversations are threaded so users can reply directly in-context to specific conversations, keeping relevant chats grouped together. @mention relevant team members to make sure you grab their attention.



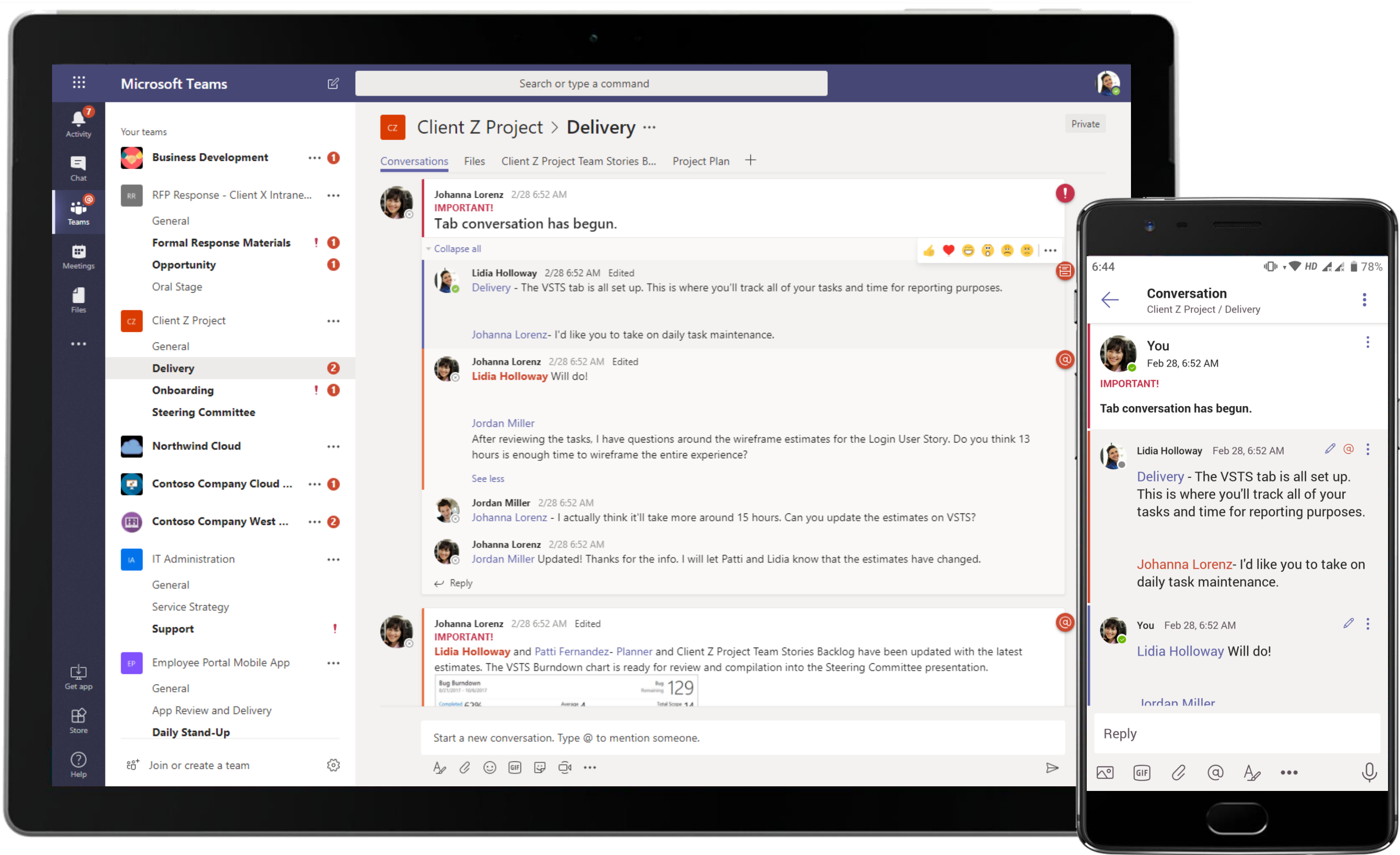
Milestone tracking and adjustments are executed with an Excel tab in a Microsoft Teams channel. The Project and Delivery Lead creates an Excel spreadsheet to temporarily track time, and posts the spreadsheet to the channel.



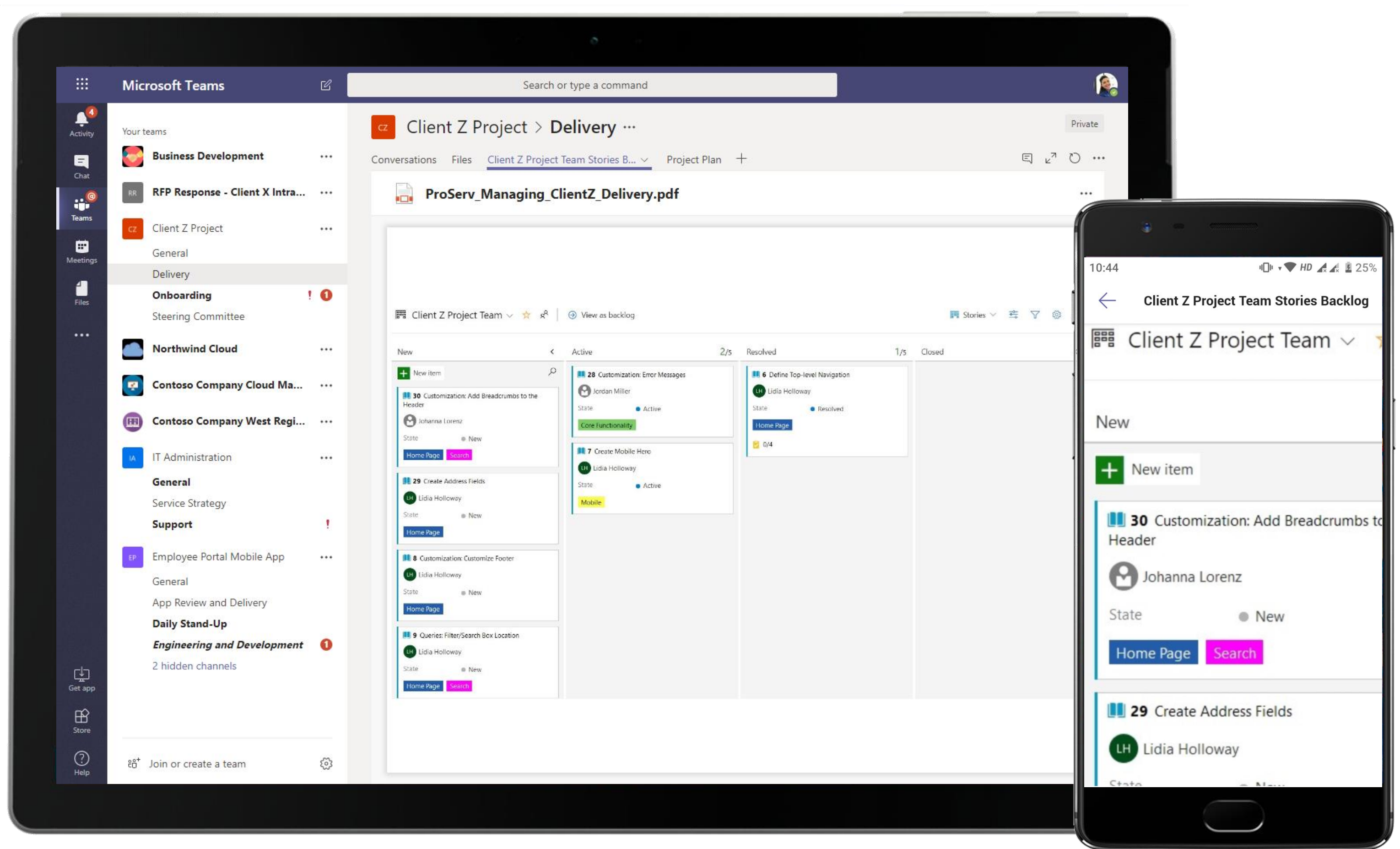
Team members stay in the know and share information directly to accelerate decision making. @mention in channels and chats allows users to tag individuals, channels or entire team to ensure relevant people are looped in.



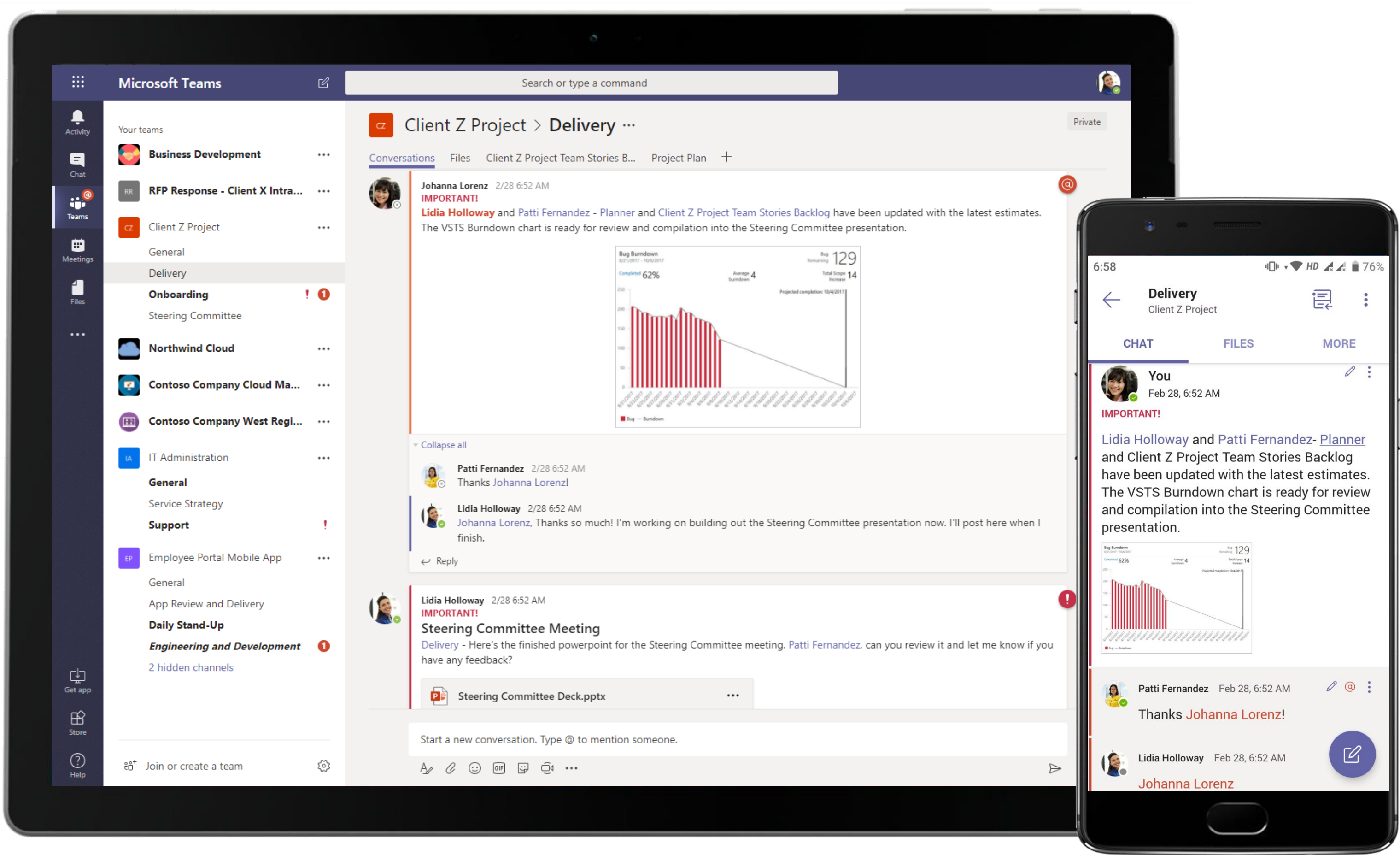
Trello enables speedy plan mobilization using task assignment and delegation. Organize and track tasks with the Trello tab in Microsoft Teams.



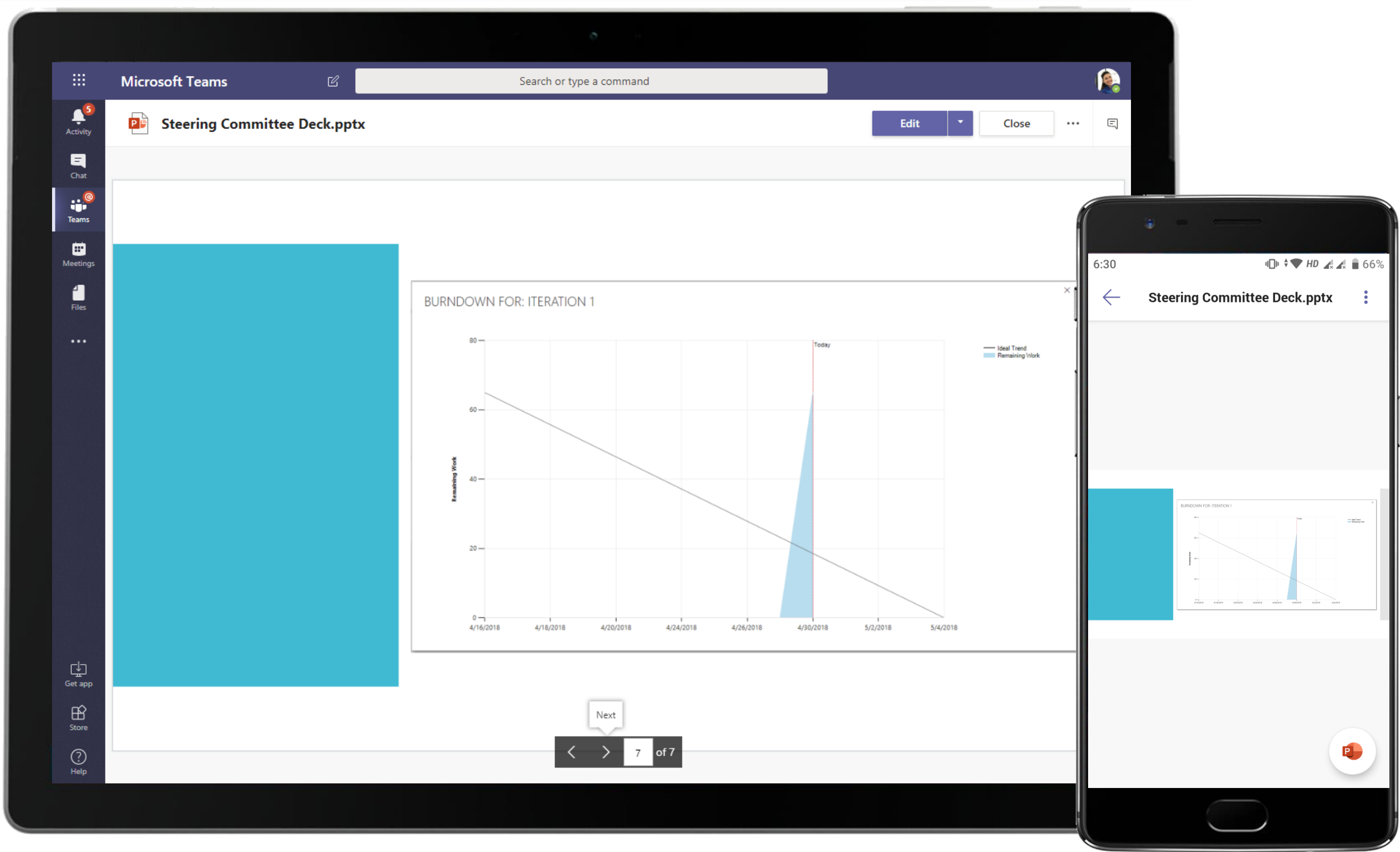
Keep track of your project by adding your favorite Azure DevOps dashboard directly into Microsoft Teams. The Project and Delivery Lead uses a VSTS burndown chart shared by a team member to build a presentation.



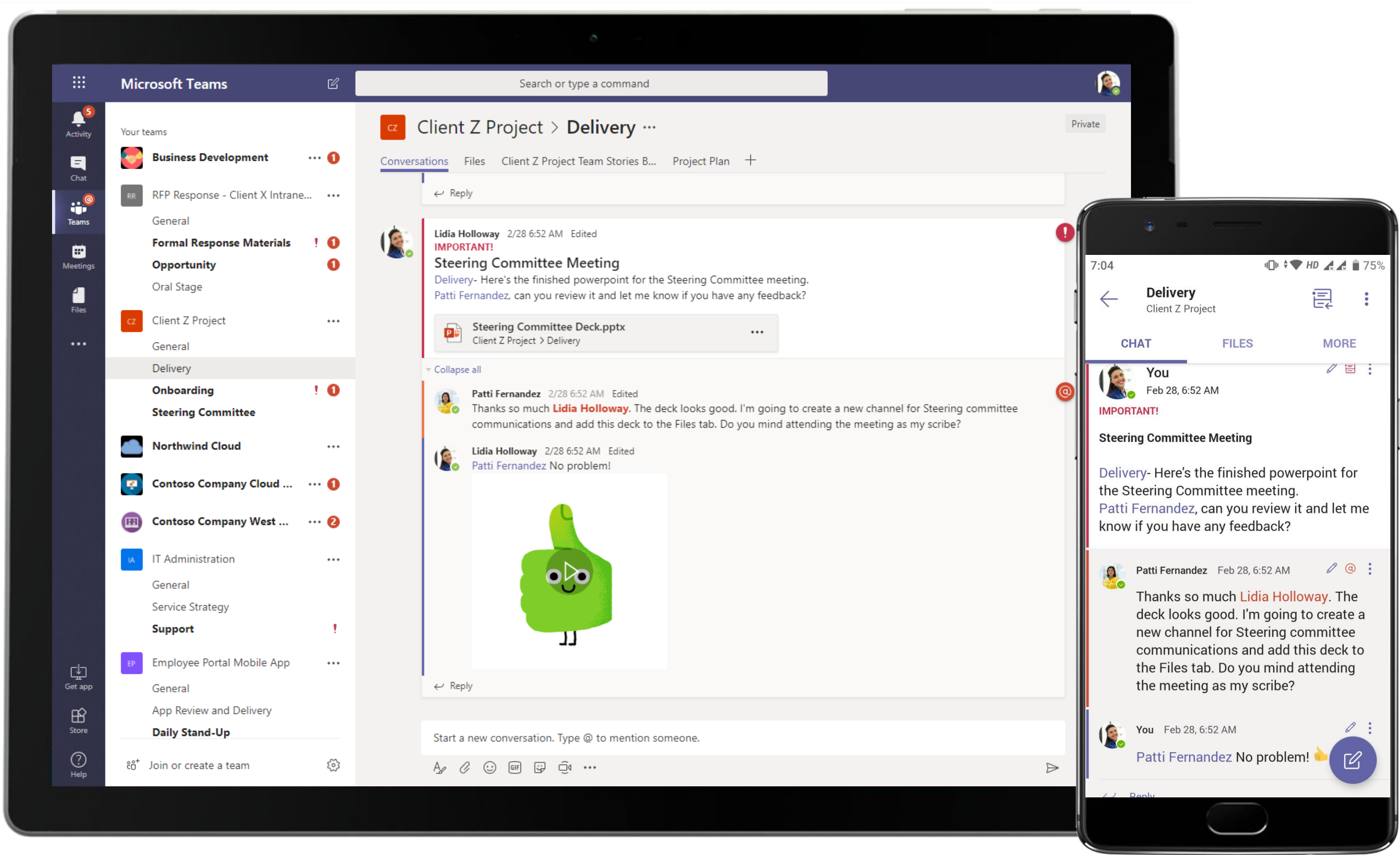
Create and track new work items/tickets by bringing Azure DevOps right into Microsoft Teams. All your favorite Kanban board features - live refresh, card styling, tag coloring, extensions, and more - are available without leaving your team's channel.



The Project and Delivery Lead shares the presentation built for the steering committee ahead of her meeting and shares it with the Project Lead for her review.



Store and share important files within a protected, cloud-enabled repository with Files. The PowerPoint deck containing the presentation for the steering committee is housed here for the team's easy access.



The deck is reviewed and the next steps to be followed are discussed and agreed upon. Close out discussions in channels to help the team understand when a critical task is complete.



Coordinating with Team to Fix a Bug in Development

Analyst

Scenario Walkthrough

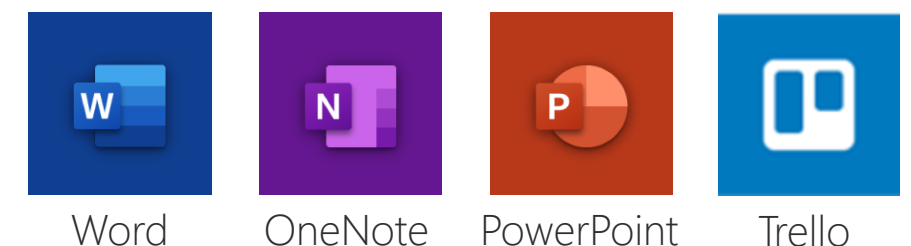
Contoso always has a large staff segment allocated to help with various Northwind projects. As a back-end developer, the Analyst knows she needs to work fast and manage herself effectively. She works on multiple tasks for short periods of time and needs a way to organize all her tasks for every project. She relies heavily on the capabilities of Microsoft Teams to do this.

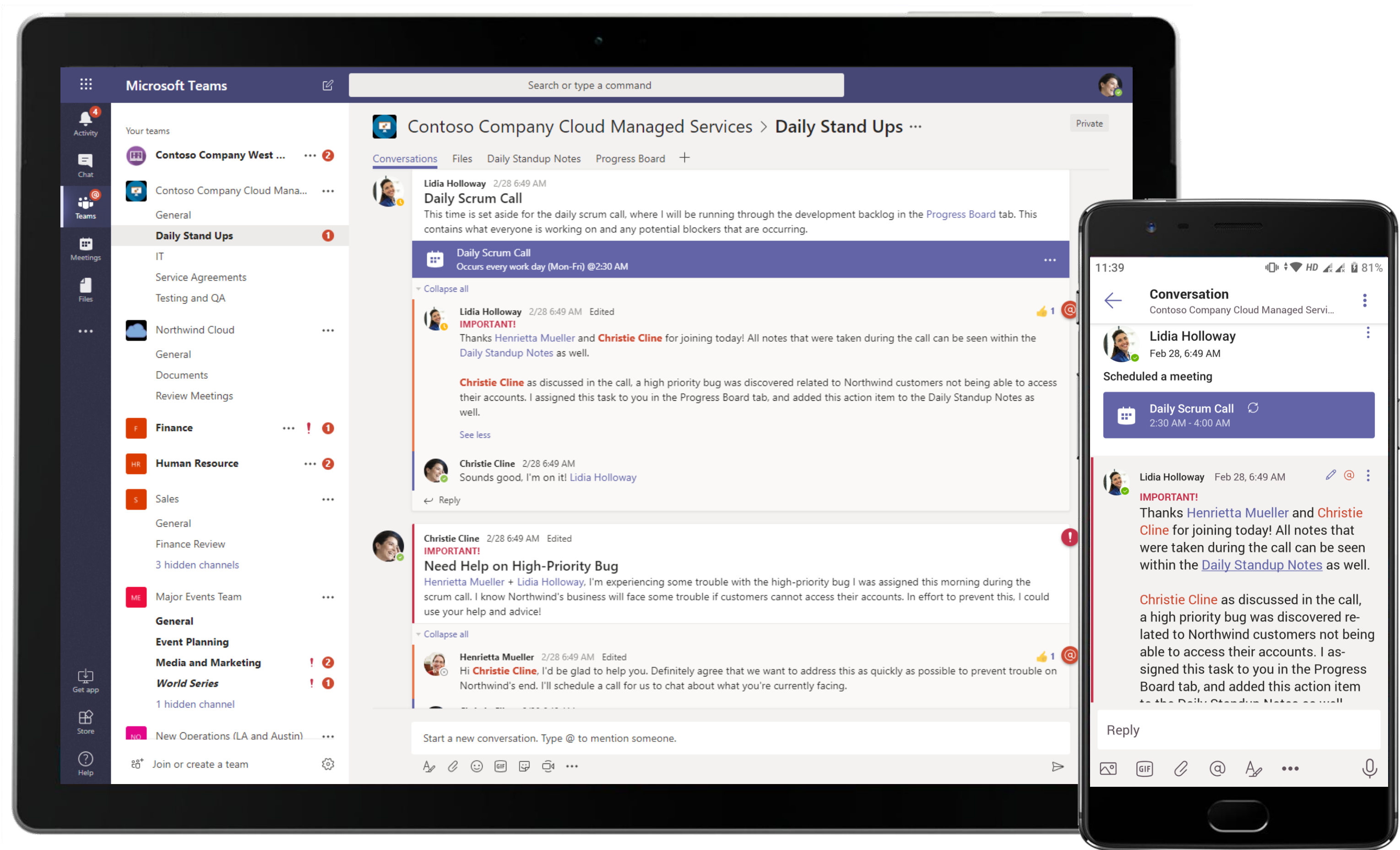
- Participates in daily scrum call set up by Project and Delivery Lead to analyse development hurdles.
- Views daily meeting notes recorded as a channel OneNote tab and the Trello task board used to assign and track project tasks.
- Reaches out for help from the Development Lead to fix a bug.
- Joins meetings and discussions with Development Lead and UX lead to fix the bug.
- Closes out the issue when UX Lead shares an alternate design in a PowerPoint deck and details bug history in a Word document and shares it with the team for their reference.

How did Teams help the Analyst execute her roles and responsibilities?

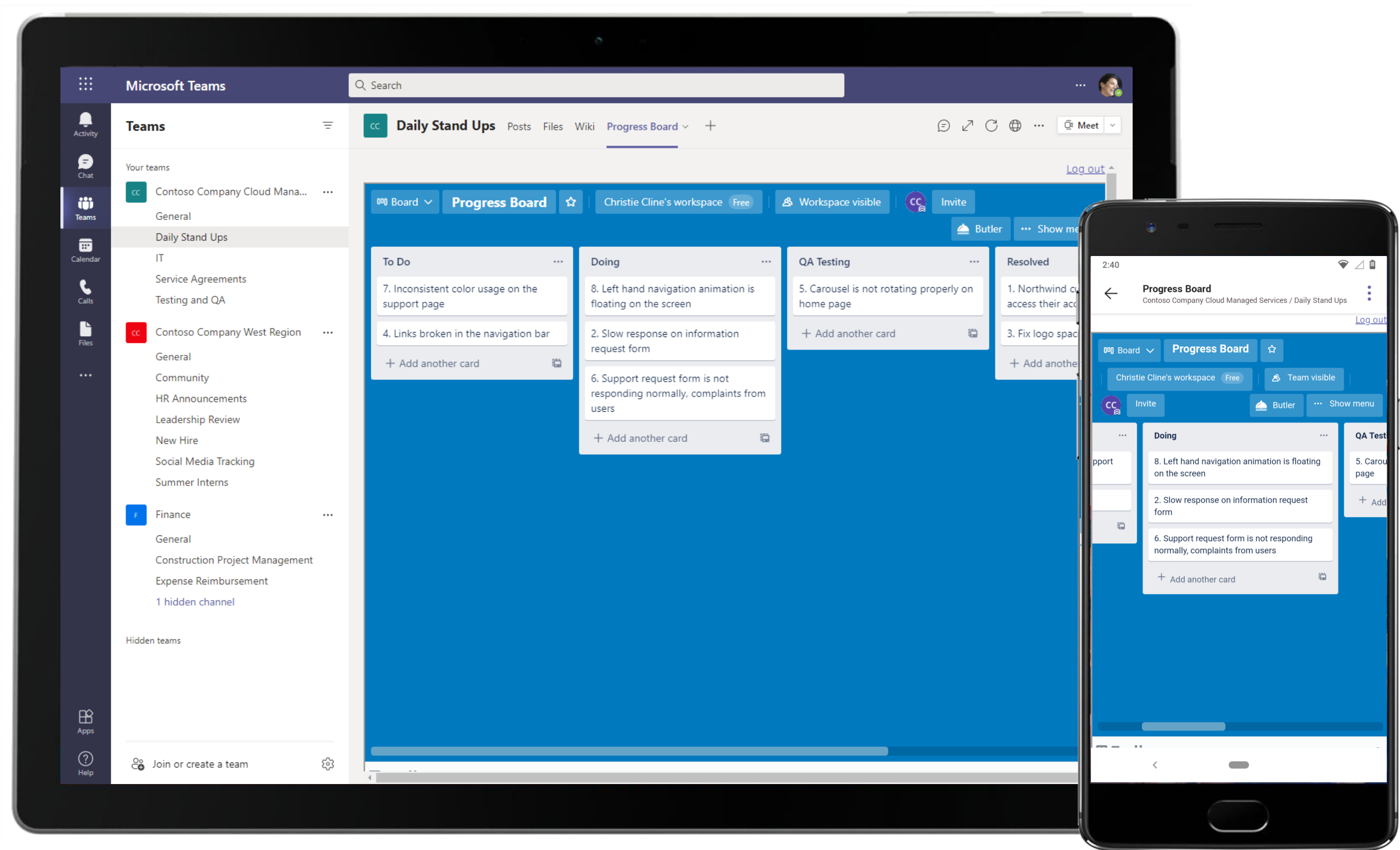
- Hold daily standups and meetings with Teams.
- Create simple task management with Trello.
- Powerful document creation with integrated Office 365 applications like Word, OneNote and PowerPoint.

Which app integrations on Teams made it possible?

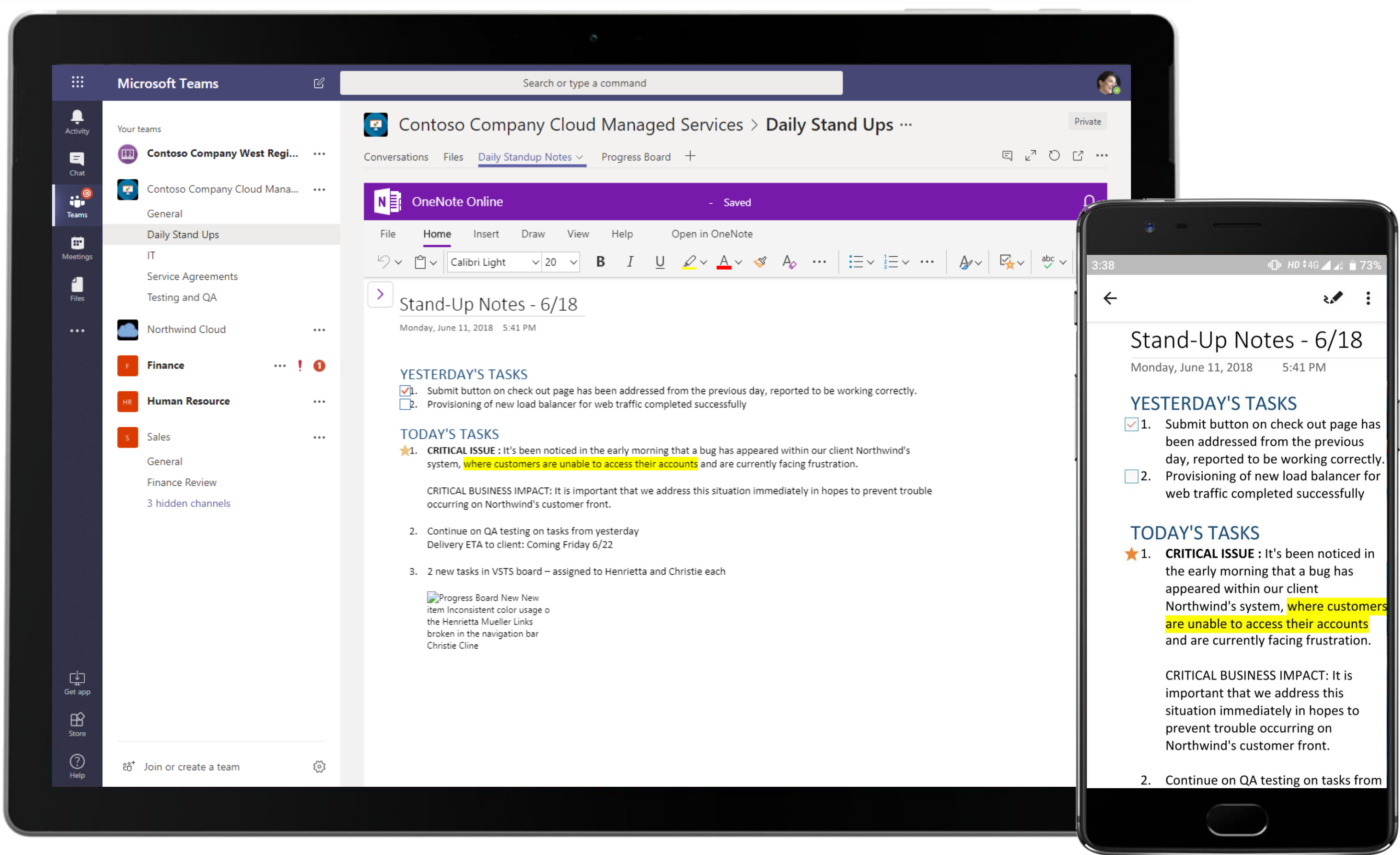




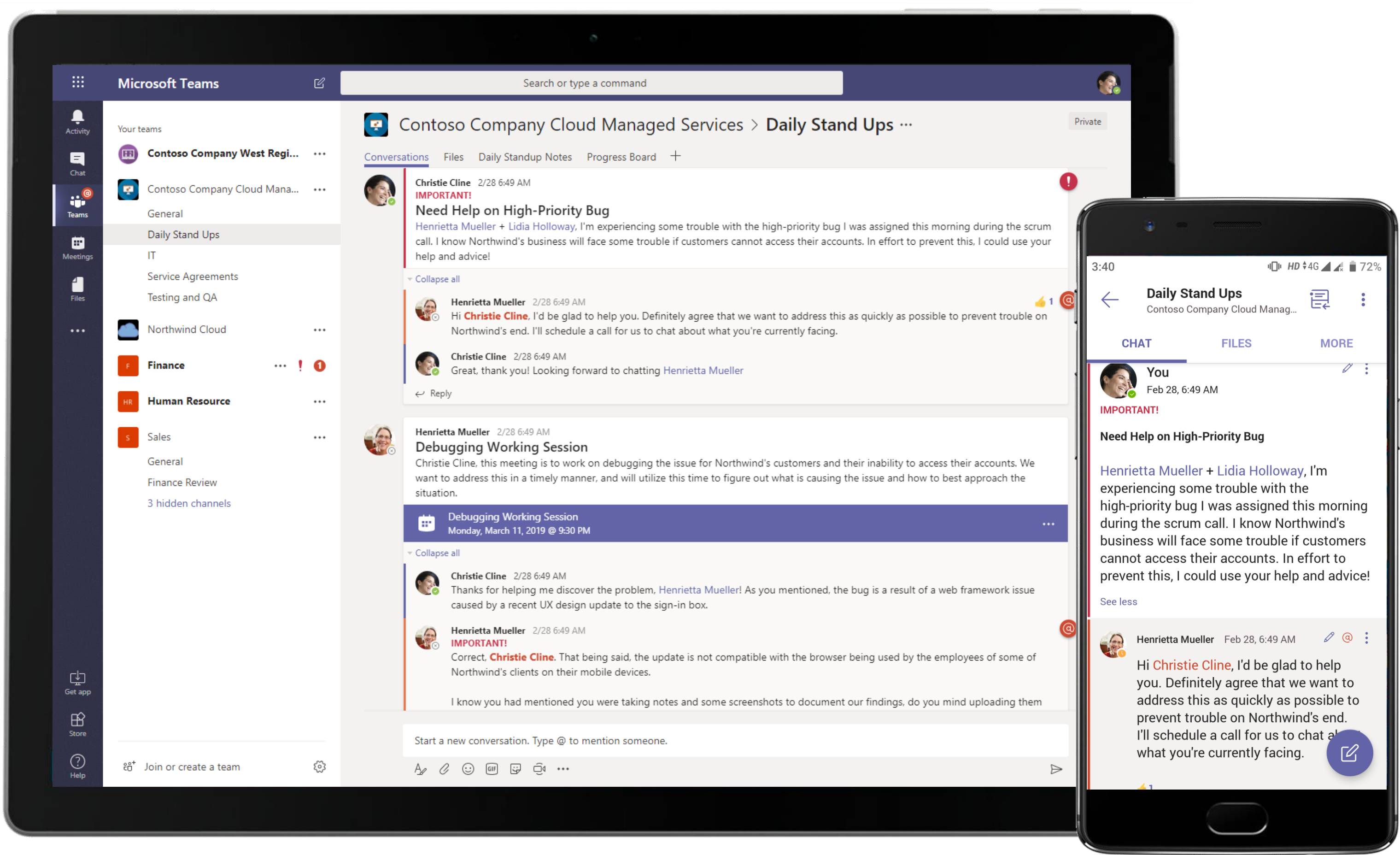
Use the meeting thread for follow-up conversation about meeting outcomes. The Project and Delivery Lead uses the thread to share her meeting notes/MOMs with team members.



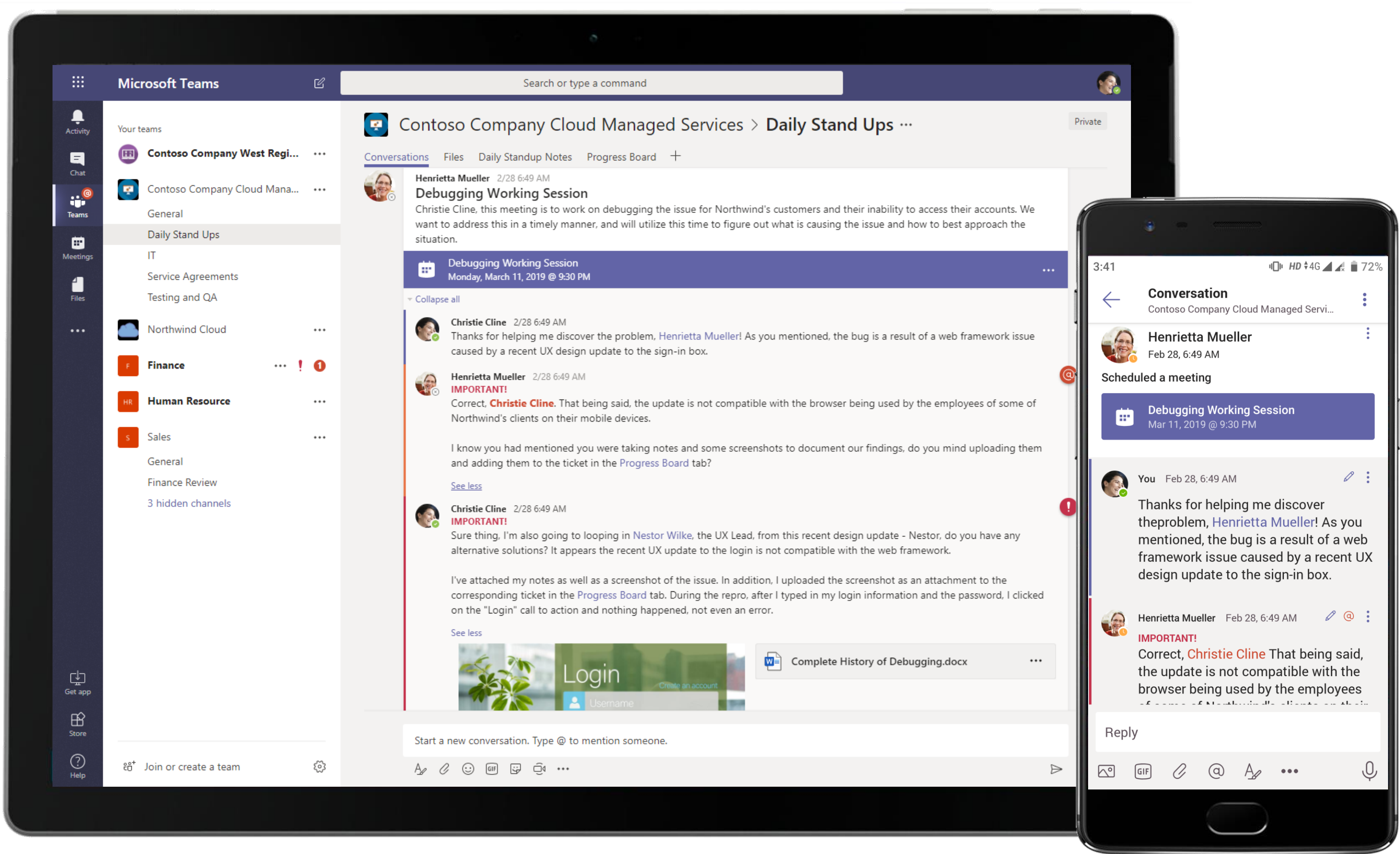
Efficient task management made easy with integrated Trello tab in channels. The Analyst views her task list in the Trello tab.



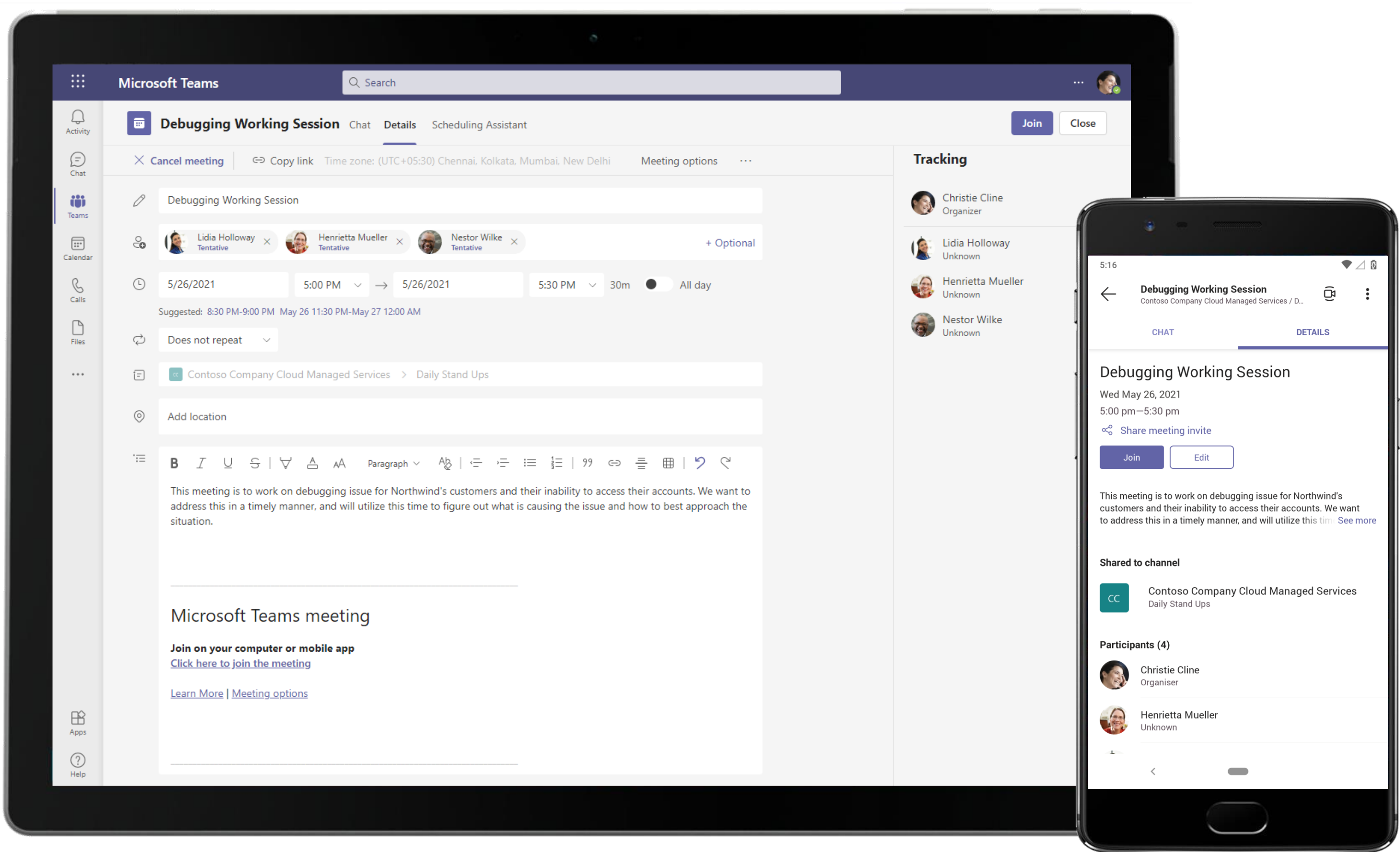
Enjoy powerful document creation with OneNote in Microsoft Teams. Quickly disseminate meeting outcome and notes among team members with OneNote tabs in channels.



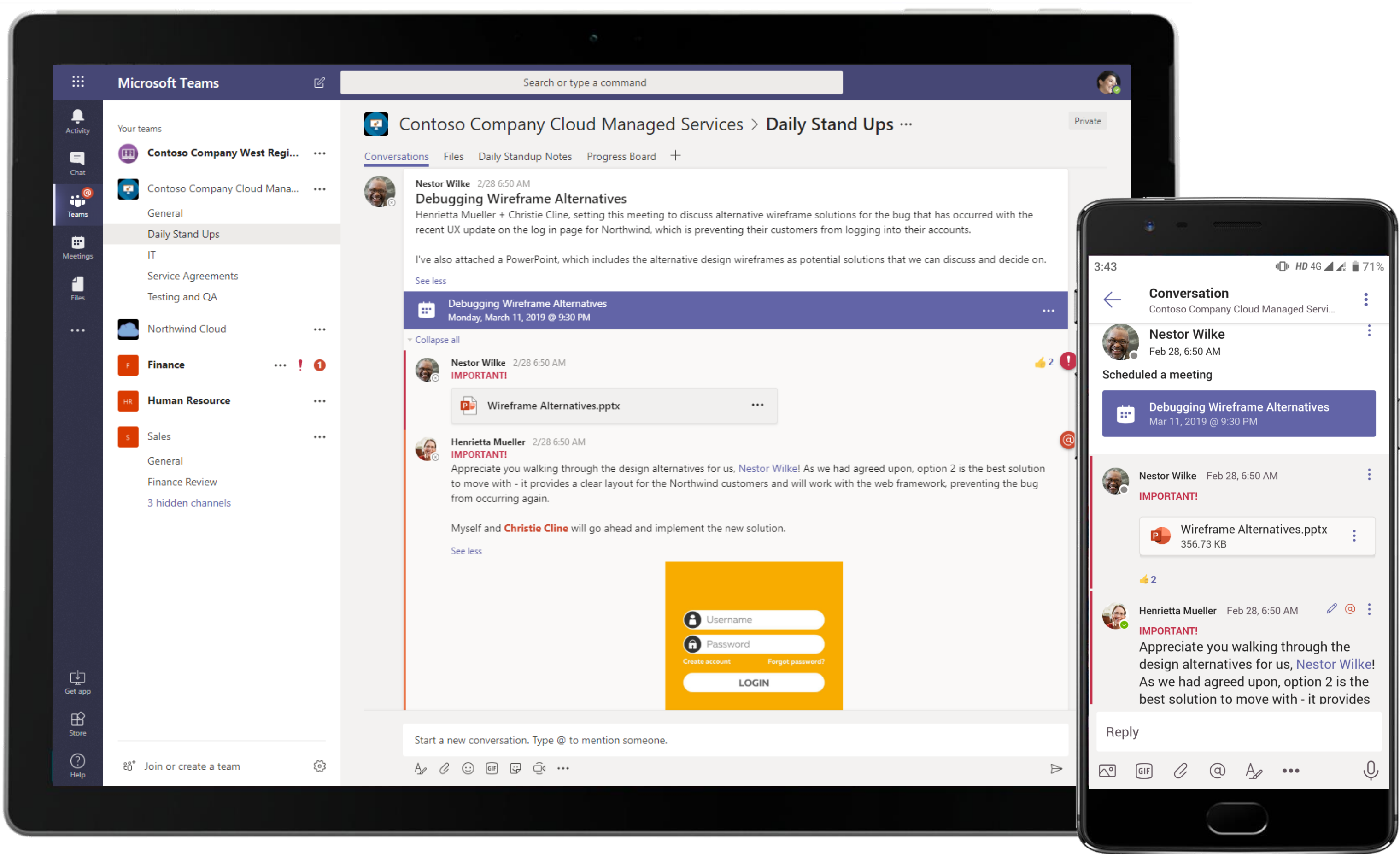
The Analyst brings the team’s attention to a high priority bug by beginning a new conversation thread for the issue. Team members engage on the post and reply with thoughts and discussion points.



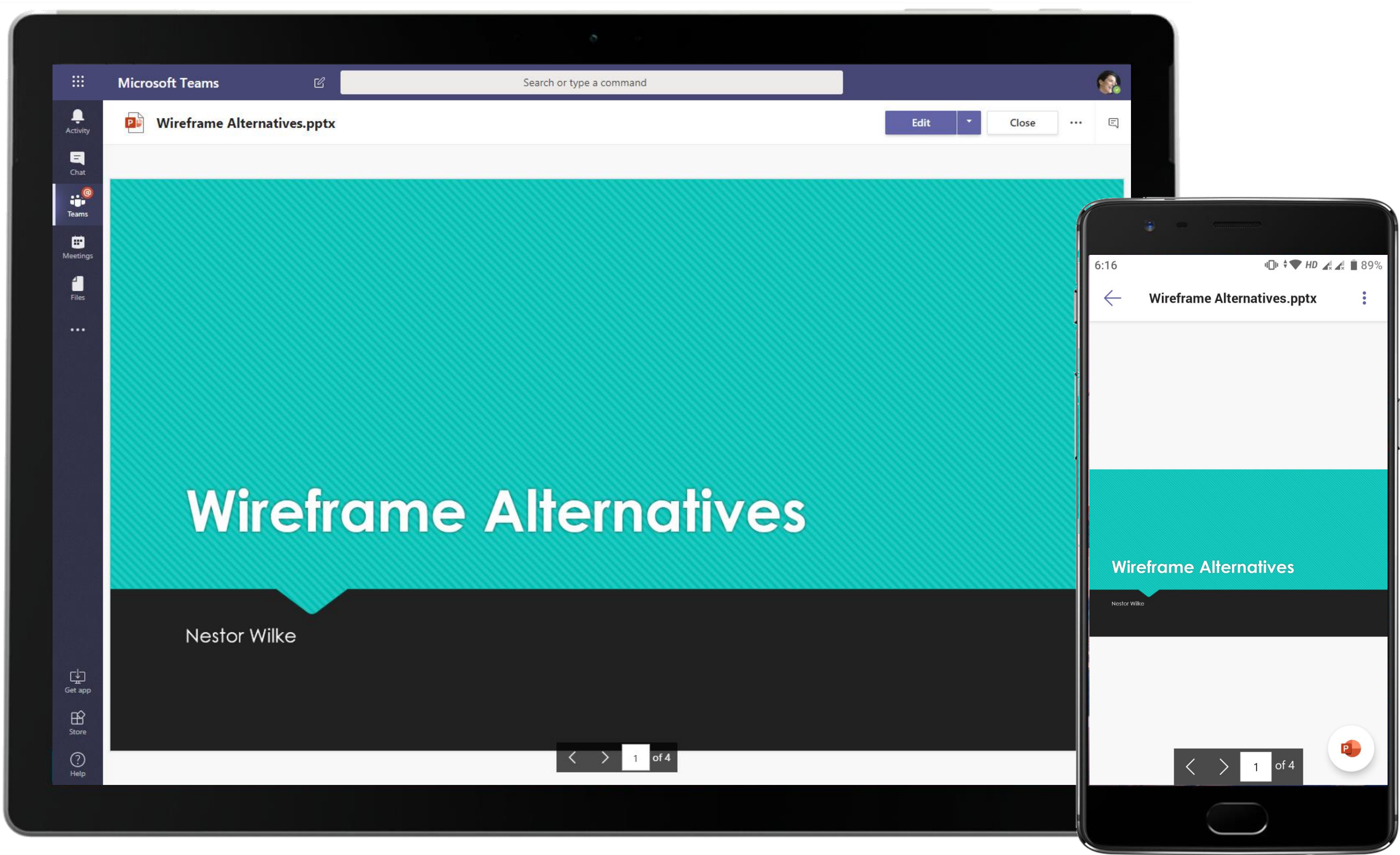
A debugging working session is scheduled to be hosted over a Teams meeting call to help the Analyst address an issue with Northwind's customers.



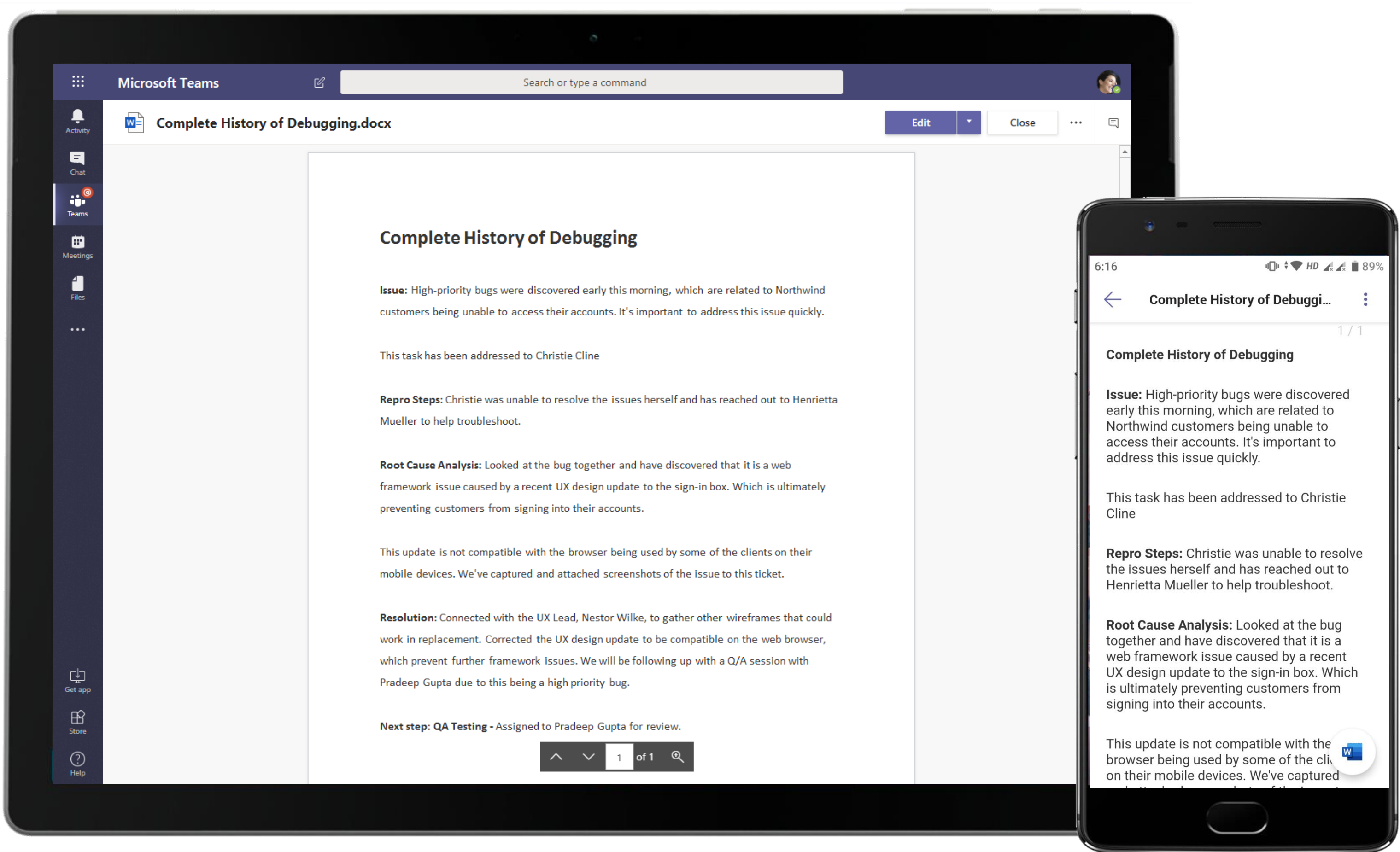
A debugging working session is scheduled to be hosted over a Teams meeting call to help the Analyst address an issue with Northwind's customers.



Keep conversations, meetings and relevant documents all in one place with Microsoft Teams. Once the session is complete, a new wireframe alternative, discussed in the meeting is executed and shared with the Analyst by a team member in the meeting thread.



Edit your presentation, customize and review it on the go, collaborating with others in real time within Teams. The PowerPoint app right inside Teams brings the full Office experience inside Teams.



A debugging history Word document is created within the channel for team members to access the solution for any future reference.



QA Process for Testing a High-Priority Bug

Analyst

Scenario Walkthrough

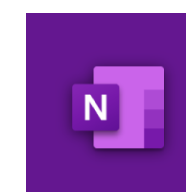
A high-priority bug for one of their biggest clients means Contoso has the best people on the job. The Analyst has a lot to do even after fixing the bug: from working with the QA team to test the fix to participating in client calls to walk them through the fix. Microsoft Teams allows the Analyst to communicate with ease with all the stakeholders, while keeping project files within easy reach for reference.

- Views a conversation thread where Development Lead @mentions her and takes action.
- Liaises with QA Lead to complete QA for a bug fixed recently using channel conversation and meetings.
- Uses a OneNote tab that sets the benchmark for high-priority bug resolution.
- Uses 1:1 chat to communicate bug status to Project and Delivery Lead.
- Joins a client review call and views a Power BI bug tracker report.
- The issue is signed off by the pleased client.

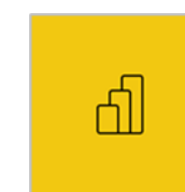
How did Teams help the Analyst execute her roles and responsibilities?

- Host video calls for in-depth communications.
- Share data and metrics with Power BI.
- Create meaningful team interactions via channel postings.
- Access notes, documents and reports right within Microsoft Teams with OneNote.

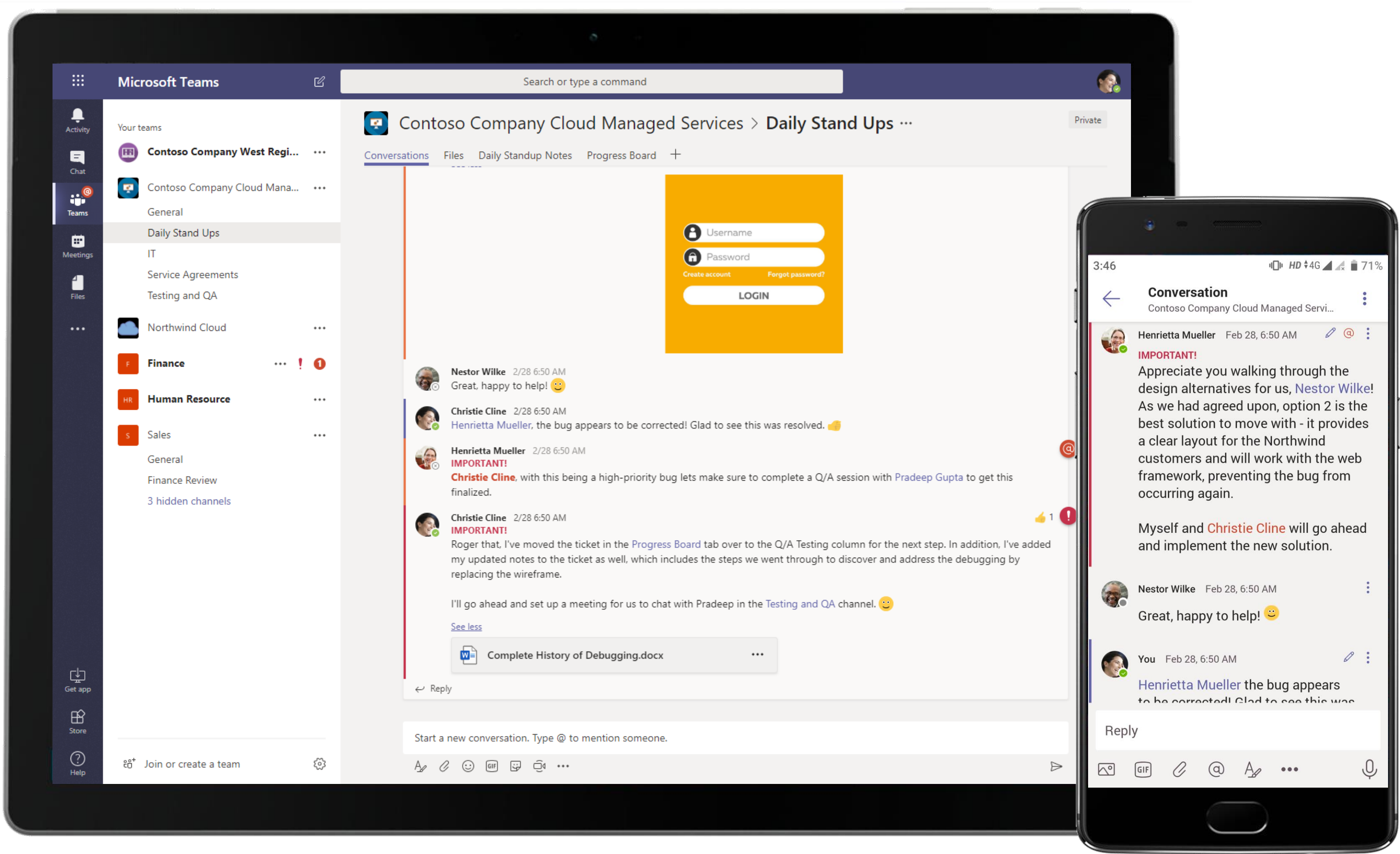
Which app integrations on Teams made it possible?



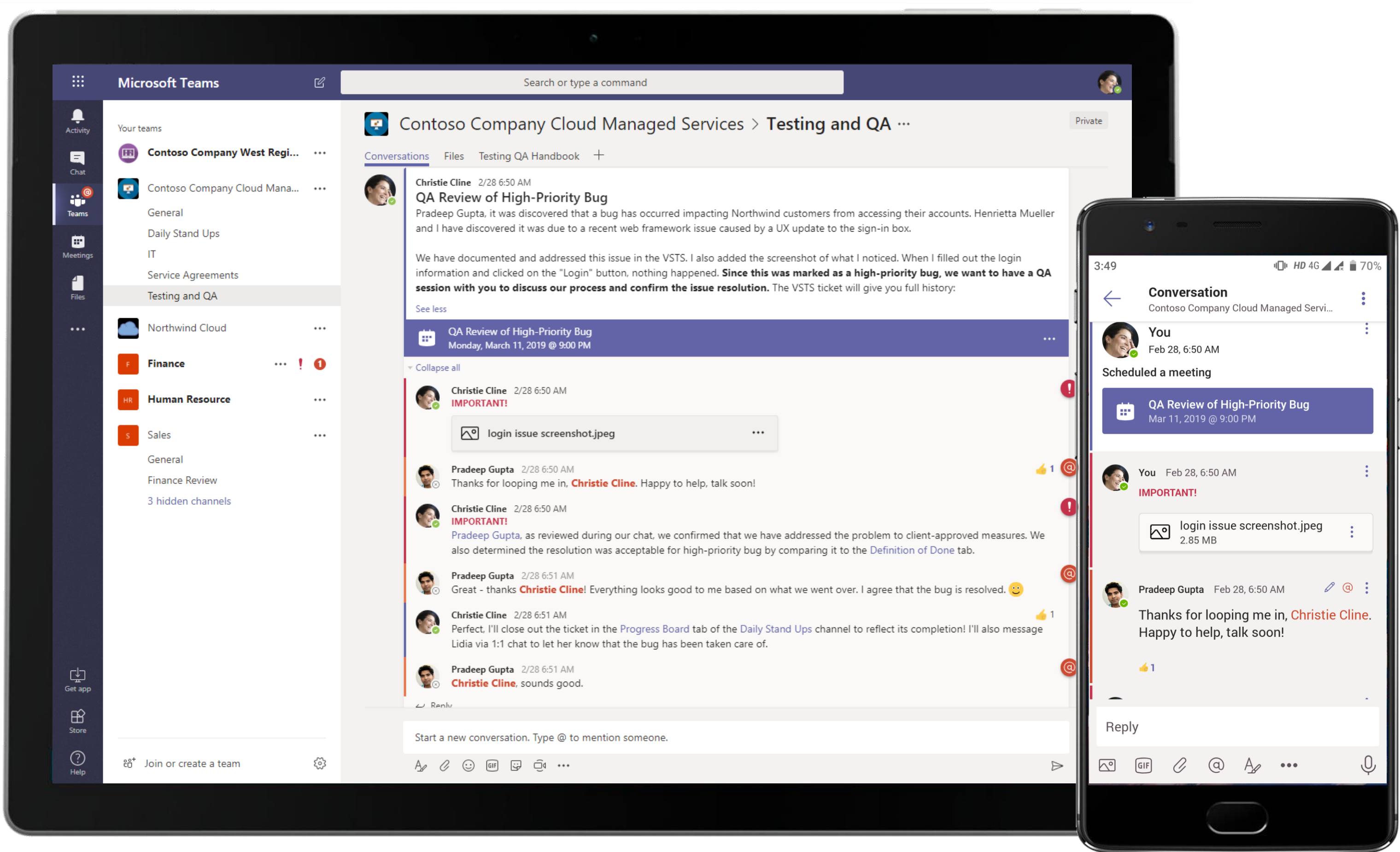
OneNote



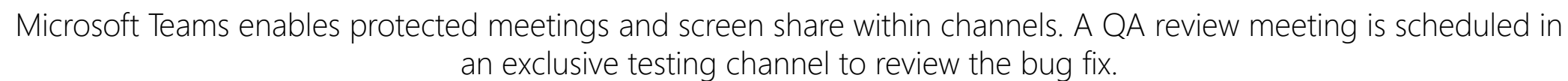
Power BI

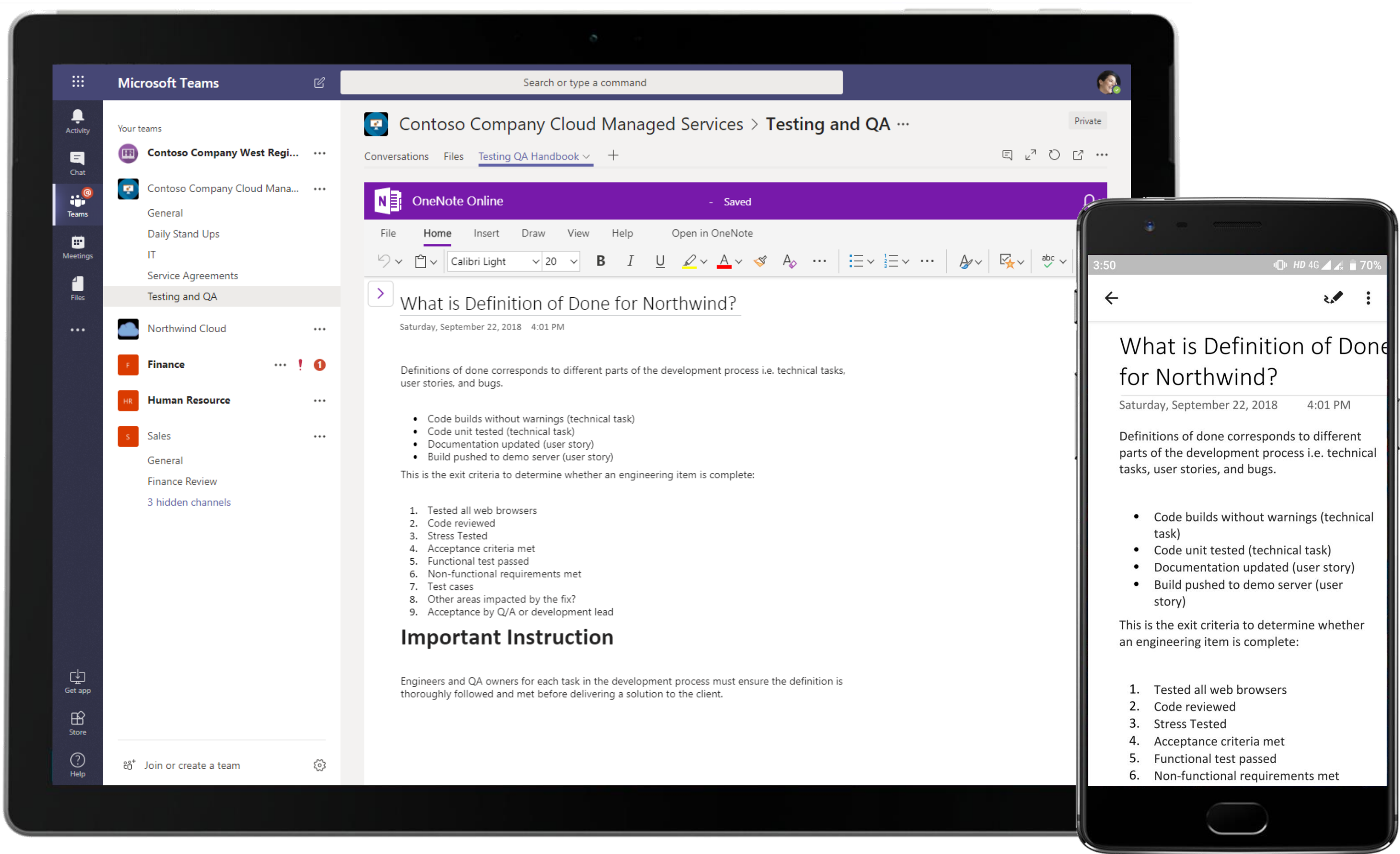


Begin conversations with team members and pull them into the discussion with @mention tags. The Analyst marks her message important, turning the channel's focus on her post.

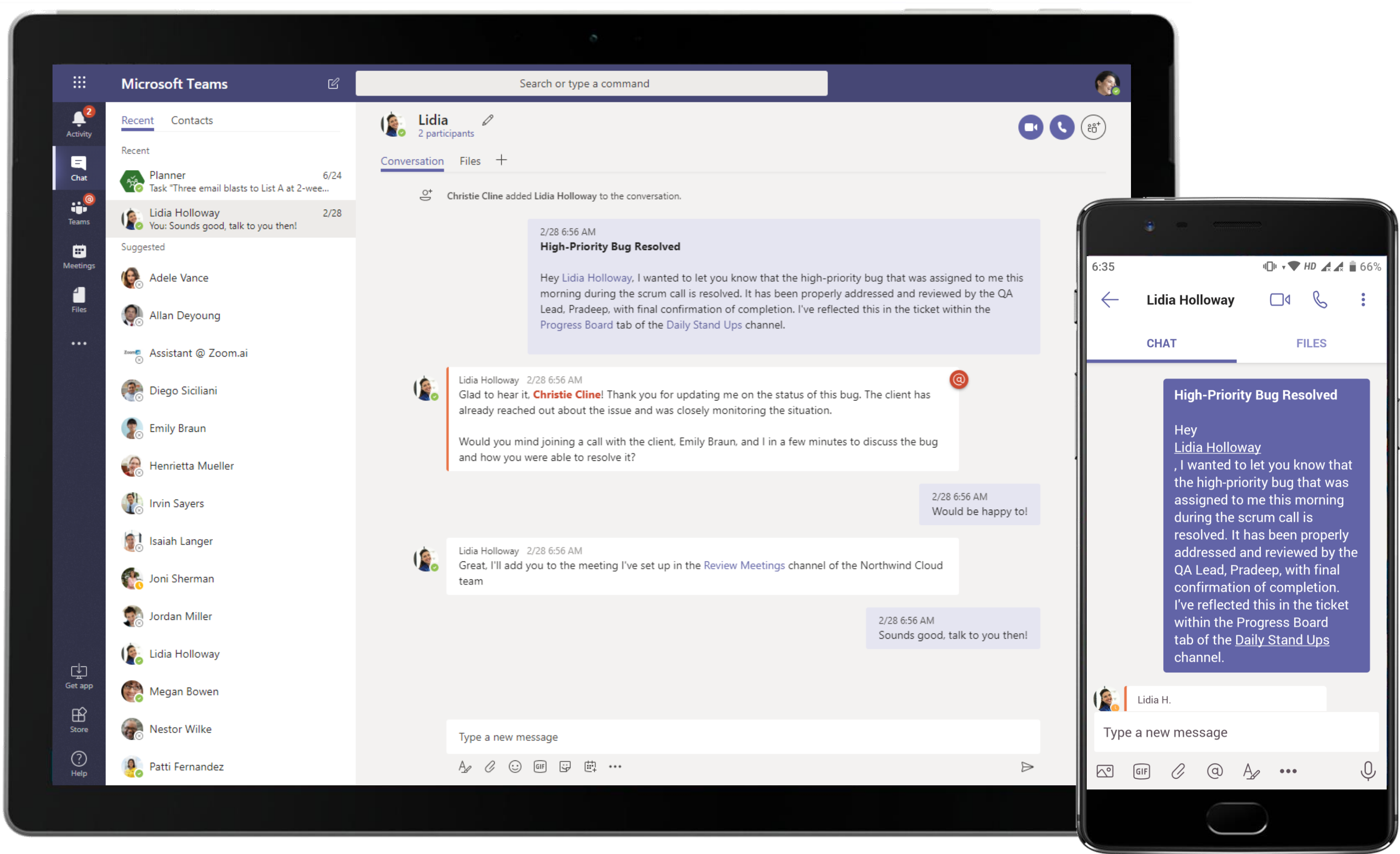


The Analyst kicks off discussion over an online meeting and the team keeps conversations and relevant documents all in the meeting thread for easy reference.

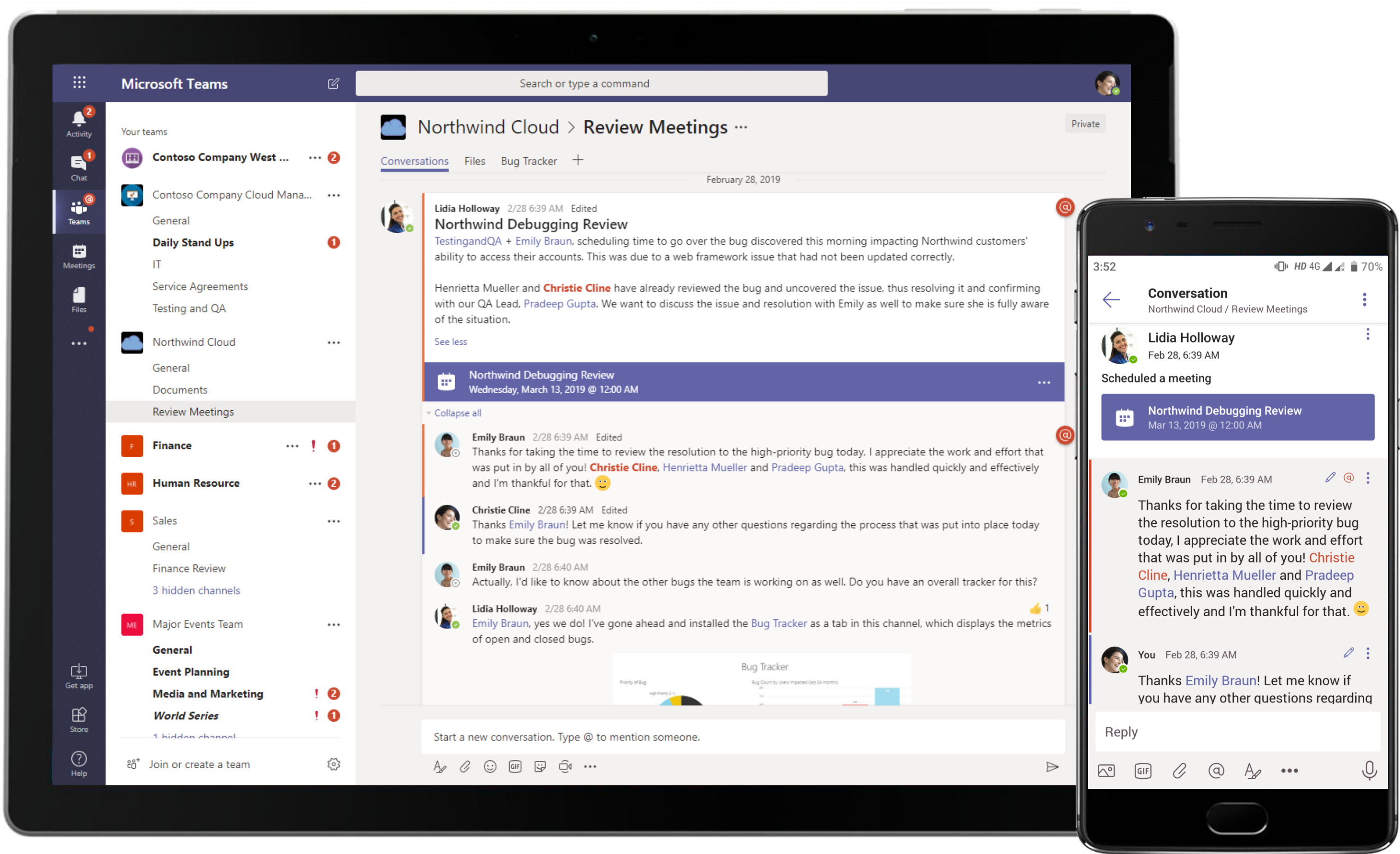




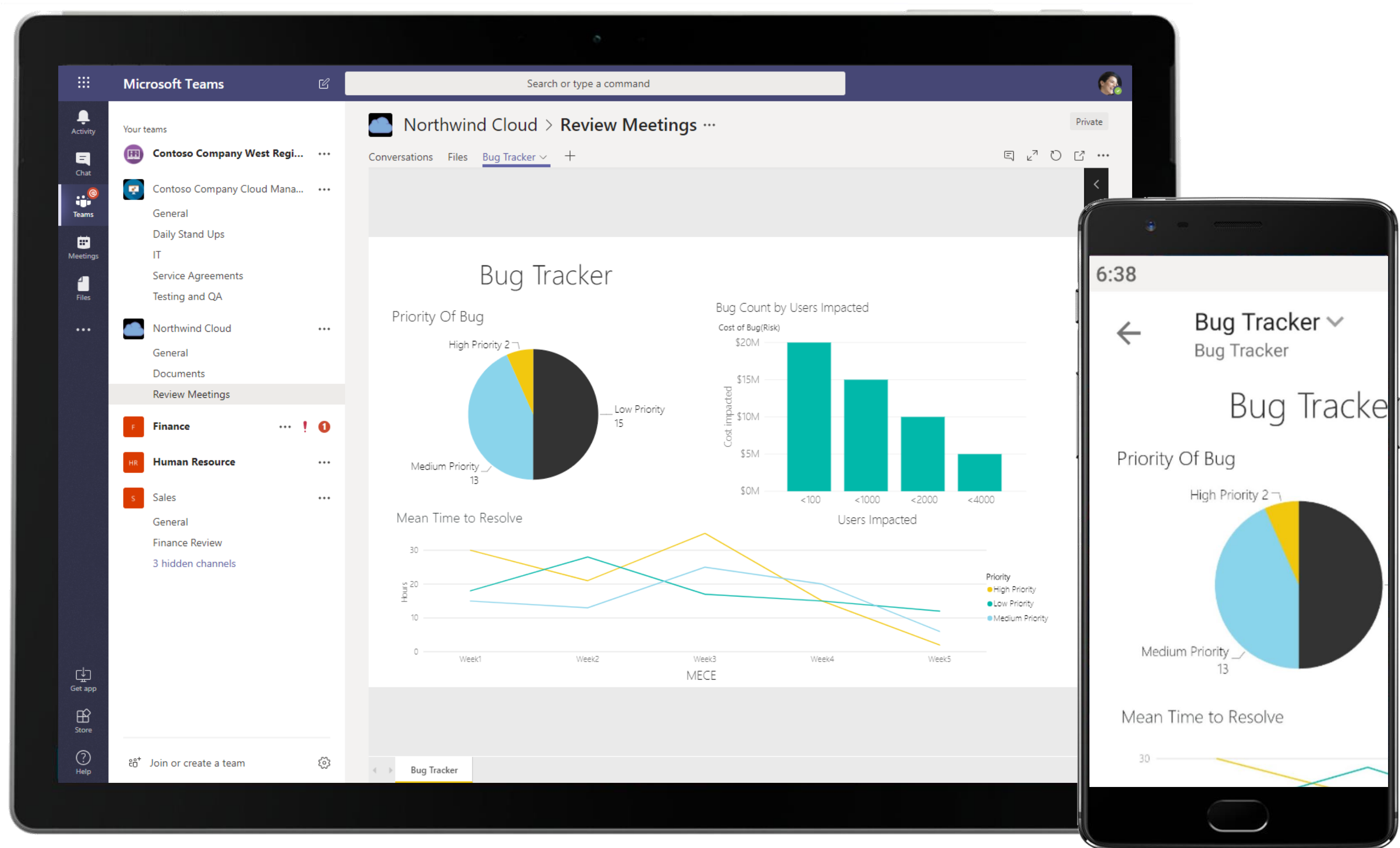
The Analyst uses the OneNote application within Teams to capture meeting notes and action items, without having to leave the Teams application.



Quickly reach out to, and chat with co-workers. Take conversations offline from channels for 1:1 discussions. The Analyst uses 1:1 chat to apprise the Project and Delivery Lead of the bug status.



Channel messages can either be brief when conveying information or detailed and clear when charting out a plan of action for team members to be a part of. Rich formatting features inside Teams allow crisp and clear communication.



Build dynamic data visualizations, measure metrics and track analytics through Power BI within Teams. The Analyst uses Power BI to break down a bug tracker report.



Planning & Strategy (Headquarters)

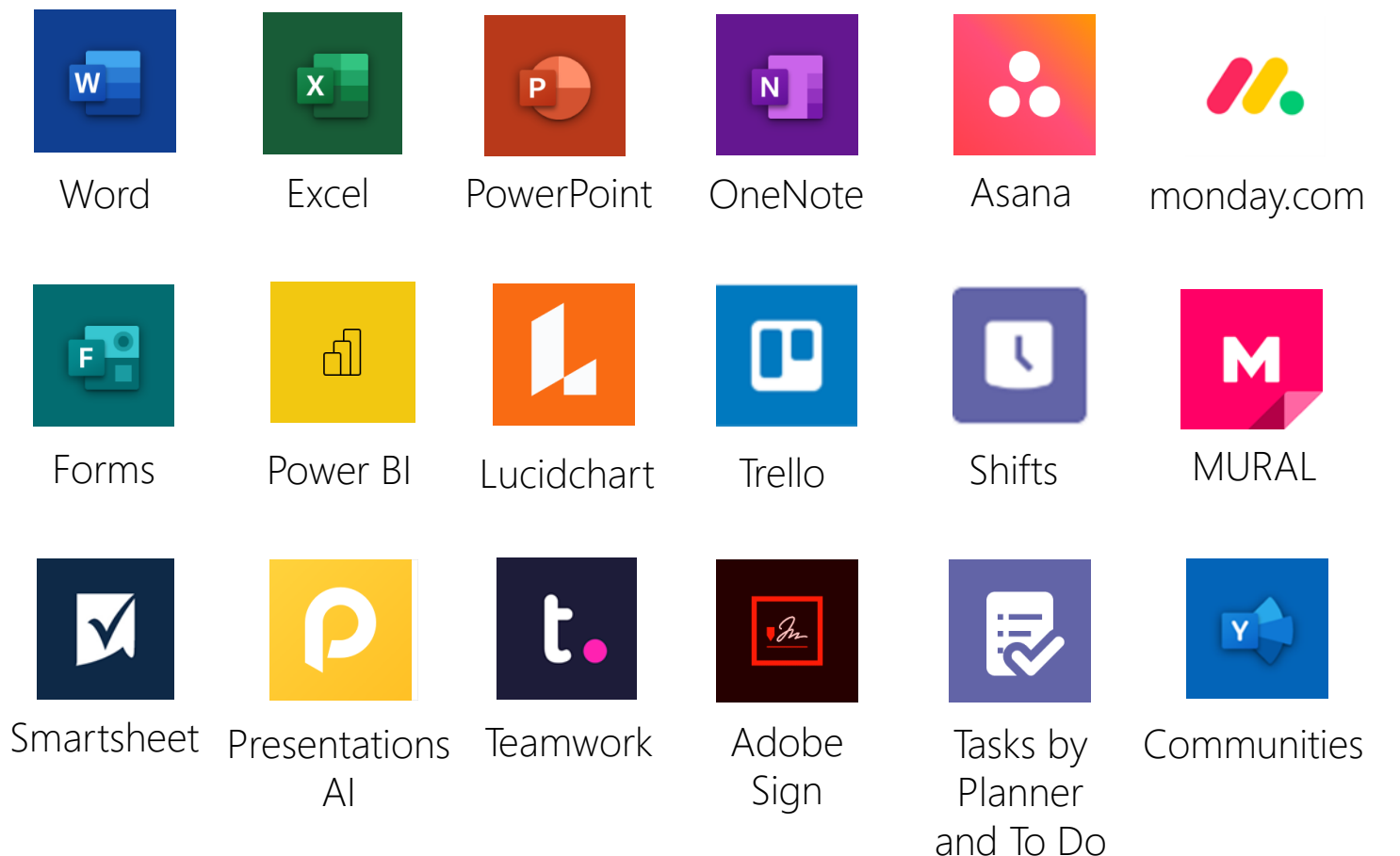
These scenarios will illustrate how Teams can help leadership team and executives, involved in planning and strategizing business objectives, communicate effectively to ensure positive business outcomes.

Planning & Strategy Superpowers in Teams

Capabilities and features used...

- Participate in instant, open-channel communication
- Store documents within a cloud-enabled repository with Files
- Real-time, contextual file sharing and co-authoring
- Channel Tabs for everyone to stay on the same page
- Help securely collaborate with teammates using familiar applications within a single environment

Apps that enable an immersive experience in Teams



Meet the Business Decision Makers

Planning & Strategy (Headquarters)



Vice President of Sales

"I believe in positioning values, not the price, to win deals for Contoso."

- Develop plans and strategies for business development and achieving the company's sales goals
- Manage the sales teams, operations and resources to deliver profitable growth
- Manage and oversee budgets
- Define optimal sales force structure
- Hire and mentor sales staff



Director

"If I've said it once, I've said it a hundred times: Always be prepared!"

- Set and achieve organization's goals and objectives
- Account for the company's activities to relevant parties, e.g. shareholders
- Monitor compliance with all leases, contracts and use agreements
- Oversee senior management efforts and coordinate with department heads



Review of Hiring Process by HR Leadership

Director

Scenario Walkthrough

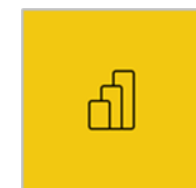
Contoso is an equal opportunity employer committed to creating a diverse workspace. The HR Leadership achieves this by routinely examining their hiring process. The leadership team spearheads the task by collaborating with HR associates.

- Posts message in HR hiring channel requesting an analysis on hiring trends, diversity efforts and attrition data.
- Responds to queries and replies from HR Associates on her post.
- HR associates present their data using a Power BI dashboard.
- Consumes the insights from the dashboard using Power BI through slices, filters, etc. right inside Teams.
- Appreciates teams' efforts and presentation at short notice.

How did Teams help the Director execute her roles and responsibilities?

- Reach entire team by creating conversation threads in channels.
- Keep track of responses with alerts in the activity feed thanks to @mentions and reply notifications.
- Utilize Power BI to compile and review data in a highly visual format.

Which app integrations on Teams made it possible?



Power BI

The image displays the Microsoft Teams interface on both a tablet and a smartphone. The tablet screen shows the 'Human Resource > Employment Trend' channel. The left sidebar lists various teams, including 'Human Resource' and 'Safety and Security'. The main area shows a conversation thread. The first message is from Leta Clements at 4:42 PM, titled 'Annual Internal Review'. It discusses the need for an analysis of hiring trends and attrition. The second message is from Enrico Cattaneo at 4:51 PM, titled 'Diversity and Attrition Data', which includes a bar chart showing 'New Hires' by month and region. The smartphone screen shows a zoomed-in view of the 'Annual Internal Review' message, highlighting the text about examining hiring trends and attrition.

Microsoft Teams Interface:

- Channel:** Human Resource > Employment Trend
- Messages:**
 - Leta Clements (4:42 PM):** Annual Internal Review. Hi Team, As part of our internal review, there are a host of parameters we examine to be sure we work towards our business goals and objectives. One of the essential parameters for the audit is to examine our hiring trends to ensure we stay true to our core hiring principle – equal opportunity employer. [Human Resource](#), please compile an analysis of our hiring trends over the past year, together with an analysis on attrition. I'd like to have this report by the end of the week. Let me know who the process owner will be for the same.
 - Isaiah Langer (4:43 PM):** Enrico Cattaneo, think this is your terrain. Can you put together the analysis please?
 - Enrico Cattaneo (4:45 PM):** Sure. I'll have it done! Just one question **Leta Clements**. Do I do a cumulative analysis or shall I keep the two parameters separate?
 - Leta Clements (4:45 PM):** As far as they are well-defined, I'm good with one report too.
 - Enrico Cattaneo (4:46 PM):** Noted!
 - Enrico Cattaneo (4:51 PM):** Diversity and Attrition Data. Hi **Leta Clements**, here is the report Recruiting Dashboard you asked for. I hope you find it covers all the parameters that you were looking to analyse. Please reach out to me for any edits.

Smartphone View:

- Conversation:** Human Resource / Employment Trend
- Message:** Leta Clements (4:42 PM) - Annual Internal Review. Hi Team, As part of our internal review, there are a host of parameters we examine to be sure we work towards our business goals and objectives. One of the essential parameters for the audit is to examine our hiring trends to ensure we stay true to our core hiring principle – equal opportunity employer. [Human Resource](#), please compile an analysis of our hiring trends over the past year, together with an analysis on attrition. I'd like to have this report by the end of the week. Let me know who the process owner will be for the same.

@mention in channels and chats allow users to tag individuals, channels or entire team to ensure relevant people are looped in. The Director posts a message in the channel and @mentions the team to get everyone's attention.

Microsoft Teams

Search or type a command

Human Resource > Employment Trend ... Public

Conversations Files Wiki +

Enrico Cattaneo 4:46 PM
Noted!
Reply

Enrico Cattaneo 4:51 PM
Diversity and Attrition Data
Hi **Leta Clements**, here is the report Recruiting Dashboard you asked for. I hope you find it covers all the parameters that you were looking to analyse. Please reach out to me for any edits.

New Hires

See less

Leta Clements 4:51 PM
Looks great. I'll let you know if I need anything else.
Reply

Last read

Leta Clements 4:52 PM
IMPORTANT!
Human Resource, I'm reviewing these reports and couldn't be happier with what I'm seeing! Thank you for the quick turnaround time on this, **Enrico Cattaneo**. I do have a few points that I think we should integrate into our existing diversity efforts:

1. Deploy a committee to examine instances of unconscious bias or prejudice
2. Host one annual event that is diversity-related and promotes it

Start a new conversation. Type @ to mention someone.

Conversation
Human Resource / Employment Trend

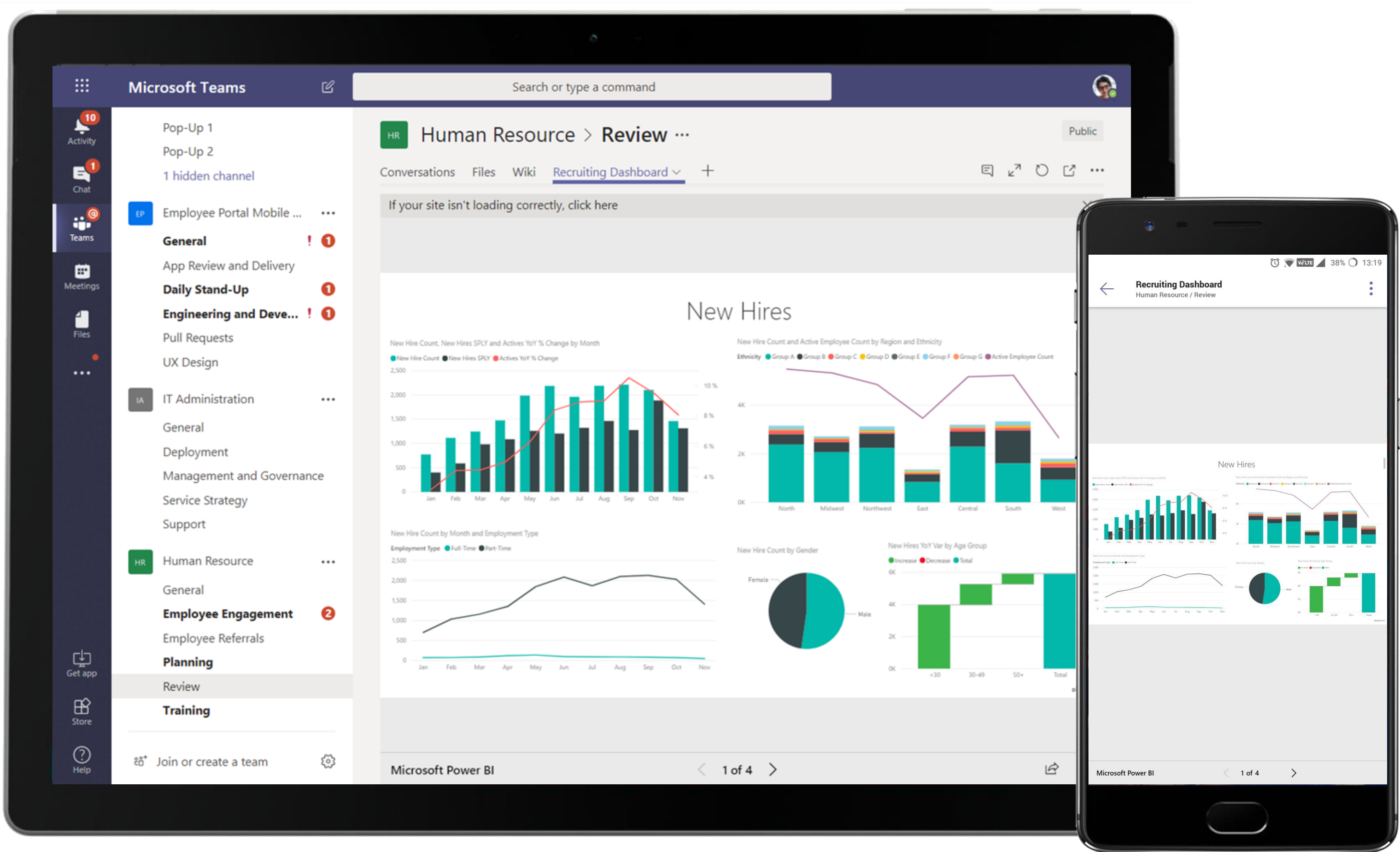
Enrico Cattaneo 4:51 PM
Diversity and Attrition Data

Hi **Leta Clements**, here is the report Recruiting Dashboard you asked for. I hope you find it covers all the parameters that you were looking to analyse. Please reach out to me for any edits.

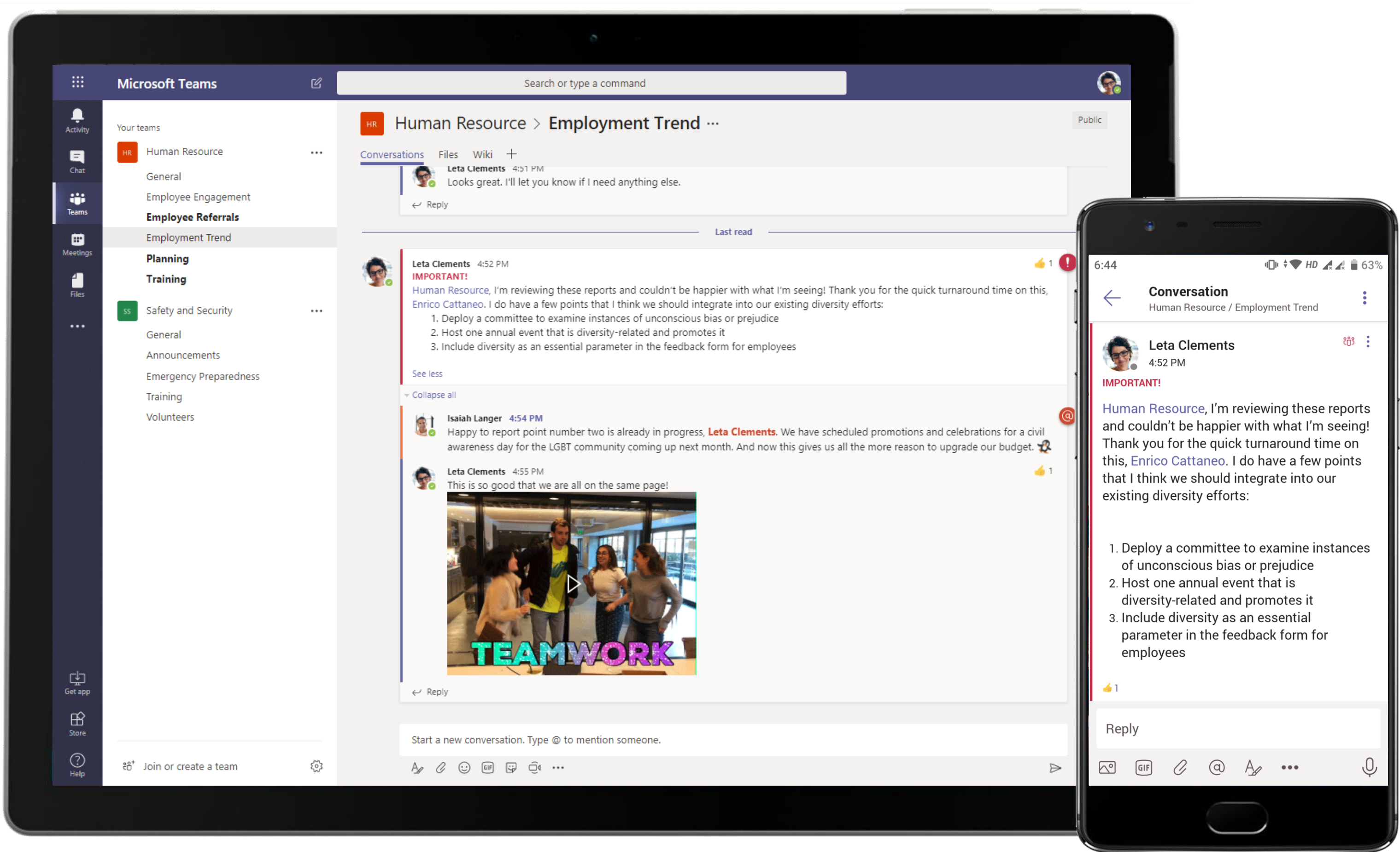
Leta Clements 4:51 PM
Looks great. I'll let you know if I need

Reply

Channel conversations are also a great place to share snippets of your visual data for team members to understand the discussion points without opening a tab or a file. An HR associate presents diversity and attrition data in the channel for everyone's consumption.



Facilitate data-driven decisions informed by visualizations and actionable insights using Power BI for Microsoft Teams. The Director is able to see trends over time, catch outliers and identify the next steps with her team.



The Director is easily able to appreciate her team members for sharing this data at short notice. She creates a conversation thread in the Review channel to lay down action items for everyone.



Mid-Month Sales Pipeline Report

Vice President of Sales

Scenario Walkthrough

A potential offshore client has included Contoso on a recent RFP. Knowing that this is a high-revenue project, Contoso's business development team puts together a strong RFP response. The VP of Sales keeps a close tab on the proposal development and decides to use the response as part of her mid-month leadership report.

- Initiates a channel conversation and @mentions Sales Manager to assign a task.
- Shares the data in an Excel sheet to the leadership team in an exclusive channel.
- Shares RFP progress with leadership.
- Compliment the team for their efforts.

How did Teams help the VP of Sales execute her roles and responsibilities?

- Harness the power of applications within Teams to achieve better business outcomes.
- Share and store valuable team information using Office 365 apps like Excel, right within Teams.
- Build dynamic visual presentations with PowerPoint
- Show gratitude for peers who went over and above their work using Praise.

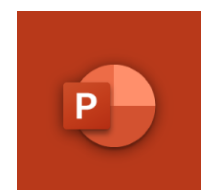
Which app integrations on Teams made it possible?



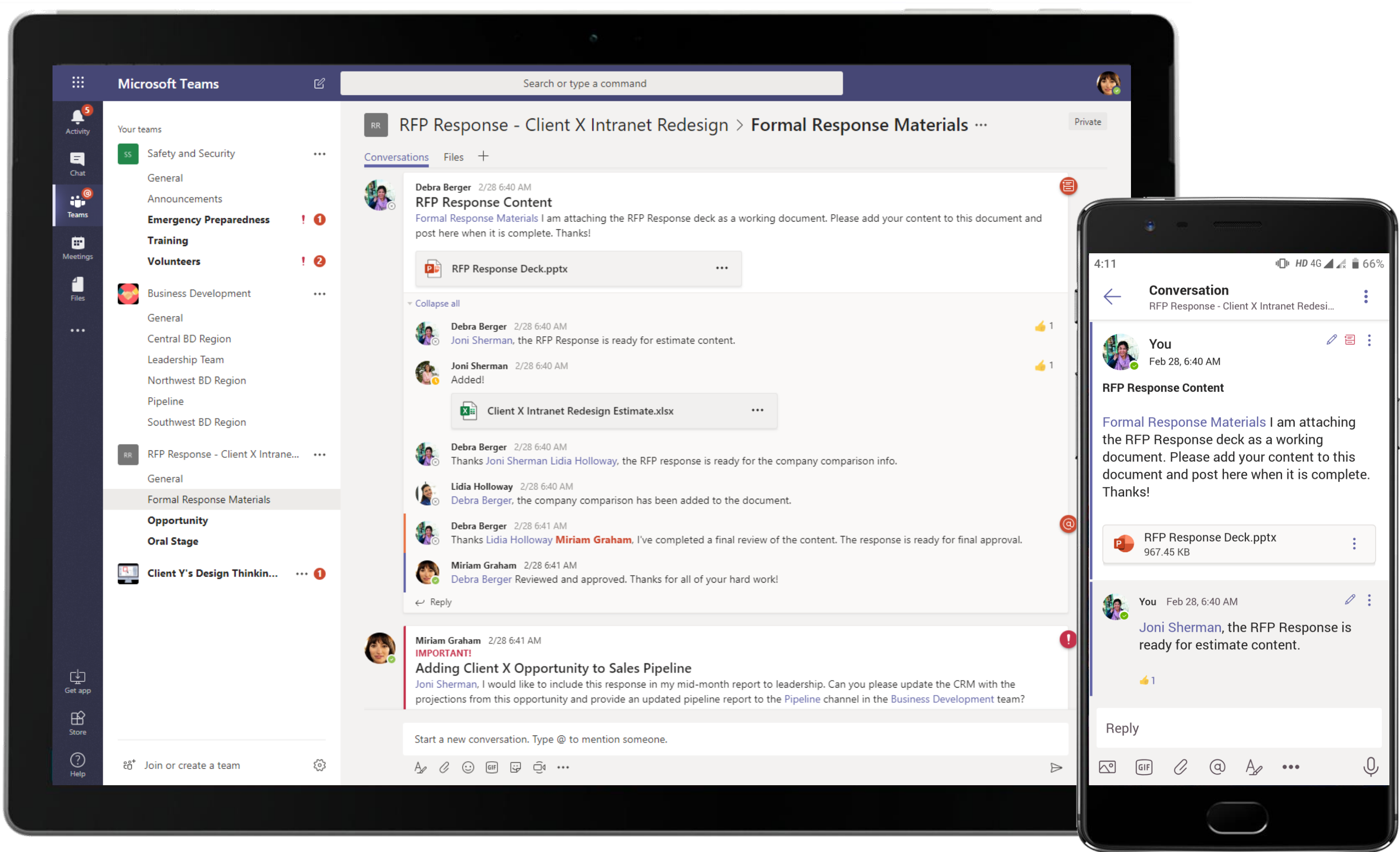
Praise



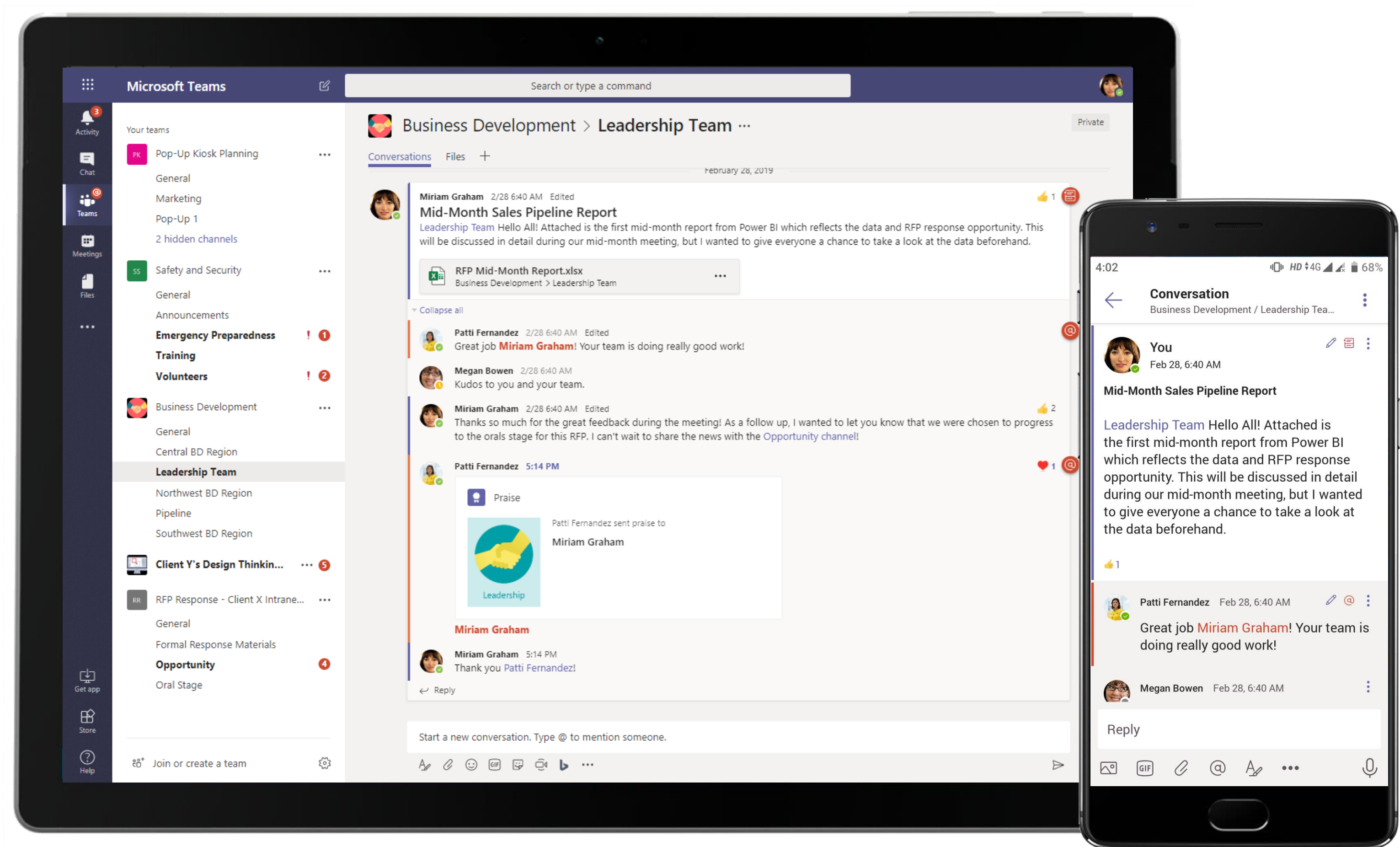
Excel



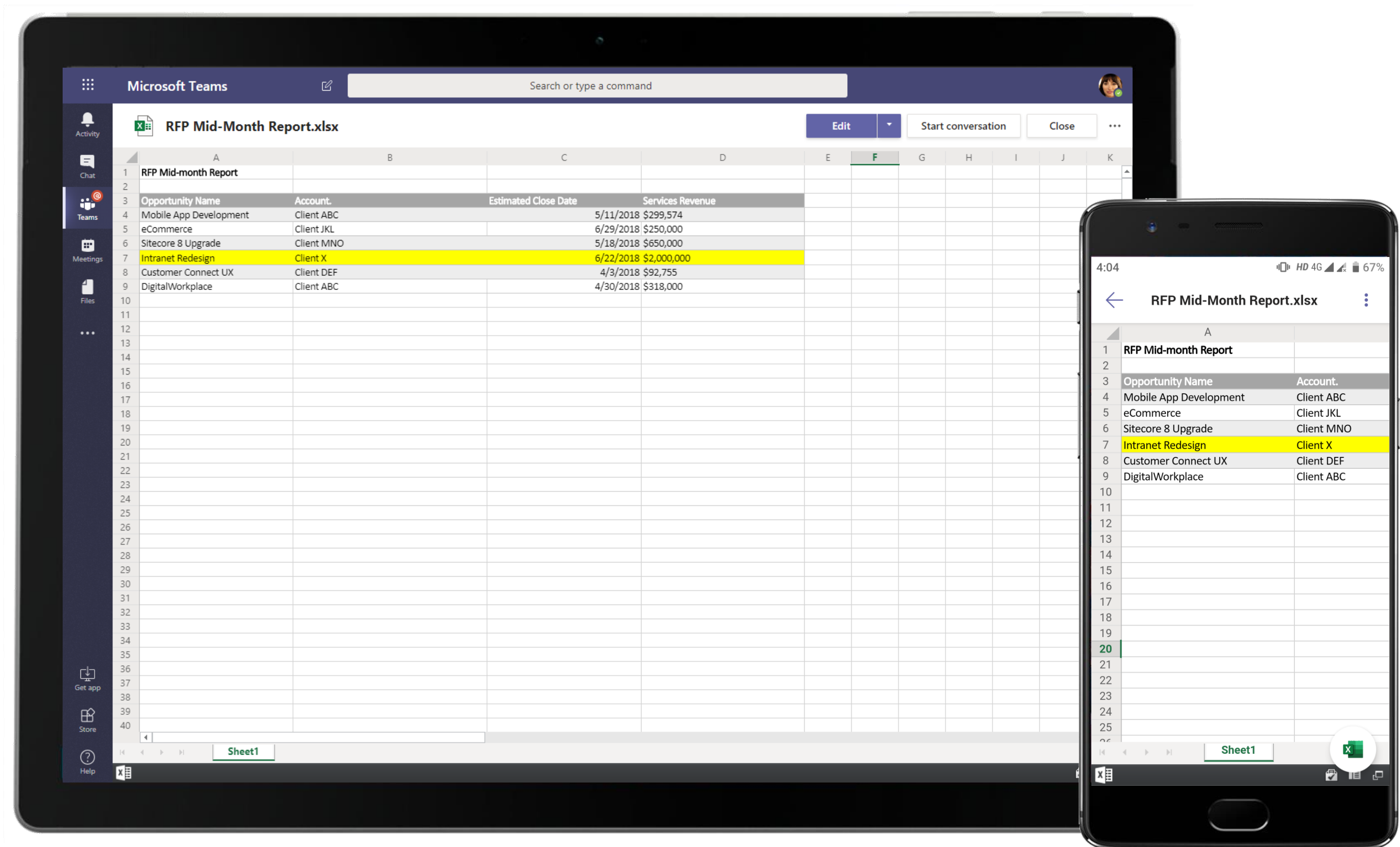
PowerPoint



Communicate in open-channel conversations and keep team members up-to-date. The Vice President initiates a channel conversation and @mentions Sales Manager to assign a task.



Teams and channels can be created to serve any purpose. They can be created to keep communication and conversation among an exclusive group of team members. The VP uses a leadership channel to submit her sales report.

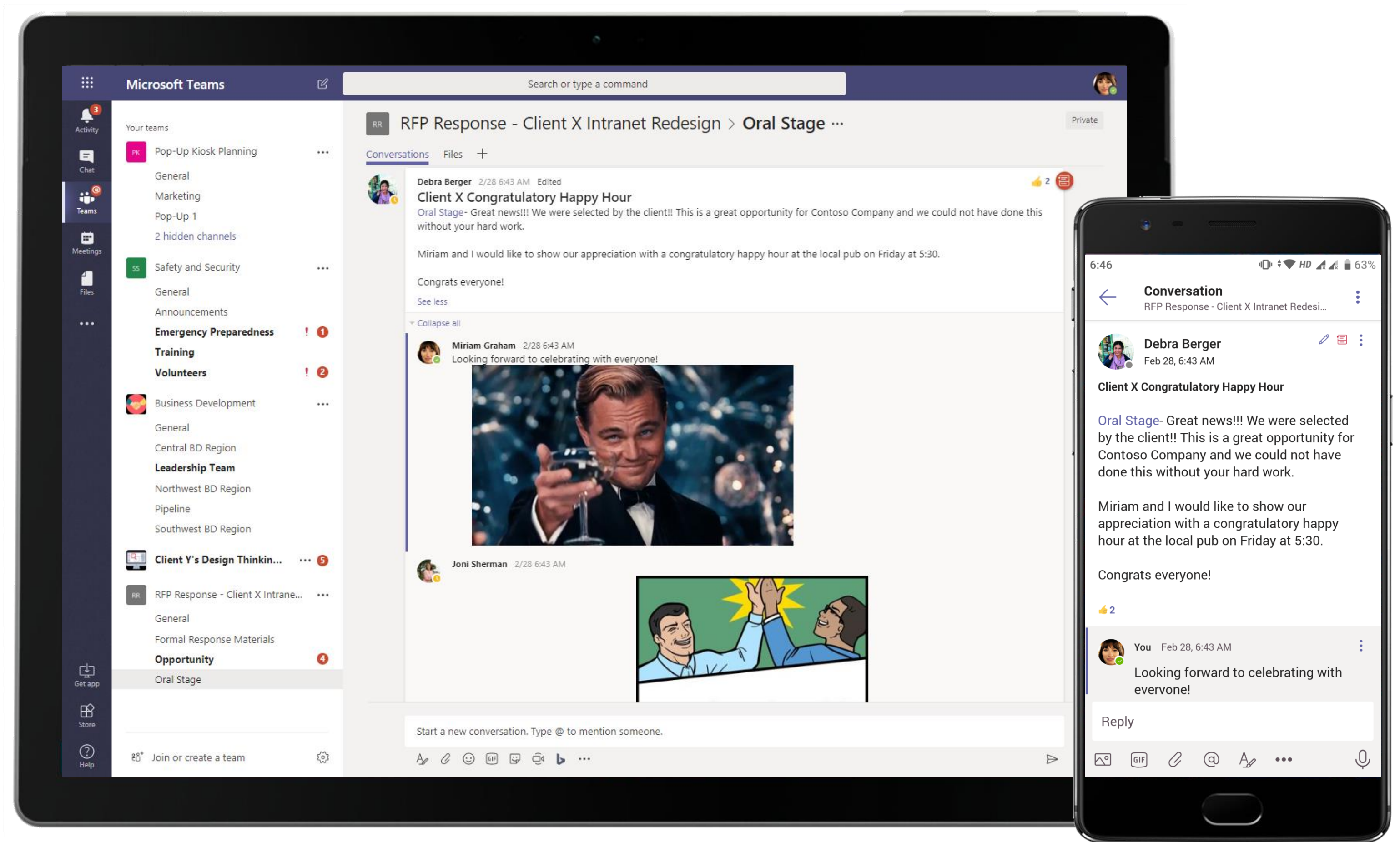


The screenshot displays the Microsoft Teams interface on a tablet and a smartphone. The main content area shows an Excel spreadsheet titled "RFP Mid-Month Report.xlsx". The spreadsheet has the following data:

Opportunity Name	Account.	Estimated Close Date	Services Revenue
Mobile App Development	Client ABC	5/11/2018	\$299,574
eCommerce	Client JKL	6/29/2018	\$250,000
Sitecore 8 Upgrade	Client MNO	5/18/2018	\$650,000
Intranet Redesign	Client X	6/22/2018	\$2,000,000
Customer Connect UX	Client DEF	4/3/2018	\$92,755
DigitalWorkplace	Client ABC	4/30/2018	\$318,000

The "Intranet Redesign" row is highlighted in yellow. The interface includes a search bar at the top, a left sidebar with navigation icons (Activity, Chat, Teams, Meetings, Files), and a bottom status bar with "Sheet1" and navigation controls. The smartphone view shows a similar interface with a back arrow and a three-dot menu icon at the top.

The VP of Sales submits her mid-month report in the channel using Excel. This spreadsheet is stored in the cloud-enabled repository with Files.



Intense in moments of work flurry, these channels also see a fair amount of levity with GIFs and emojis that makes working together fun! The VP uses channel communication to congratulate the team that lands the proposal with the client.



Coordinating Disaster Response Preparedness

Director

Scenario Walkthrough

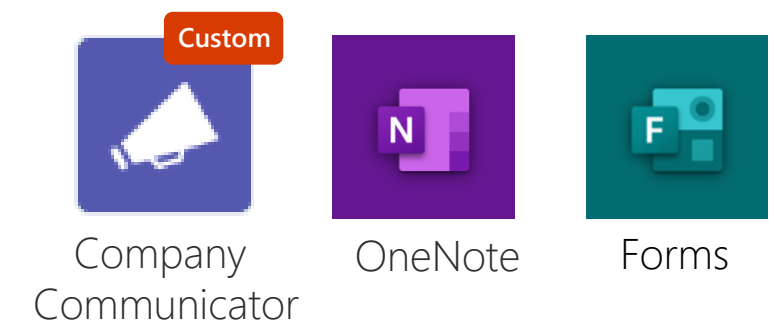
Supported by the organizing and collaborative assistance of Microsoft Teams, Contoso runs a multi-faceted simulation to test emergency preparedness of the organization, achieving impressive results.

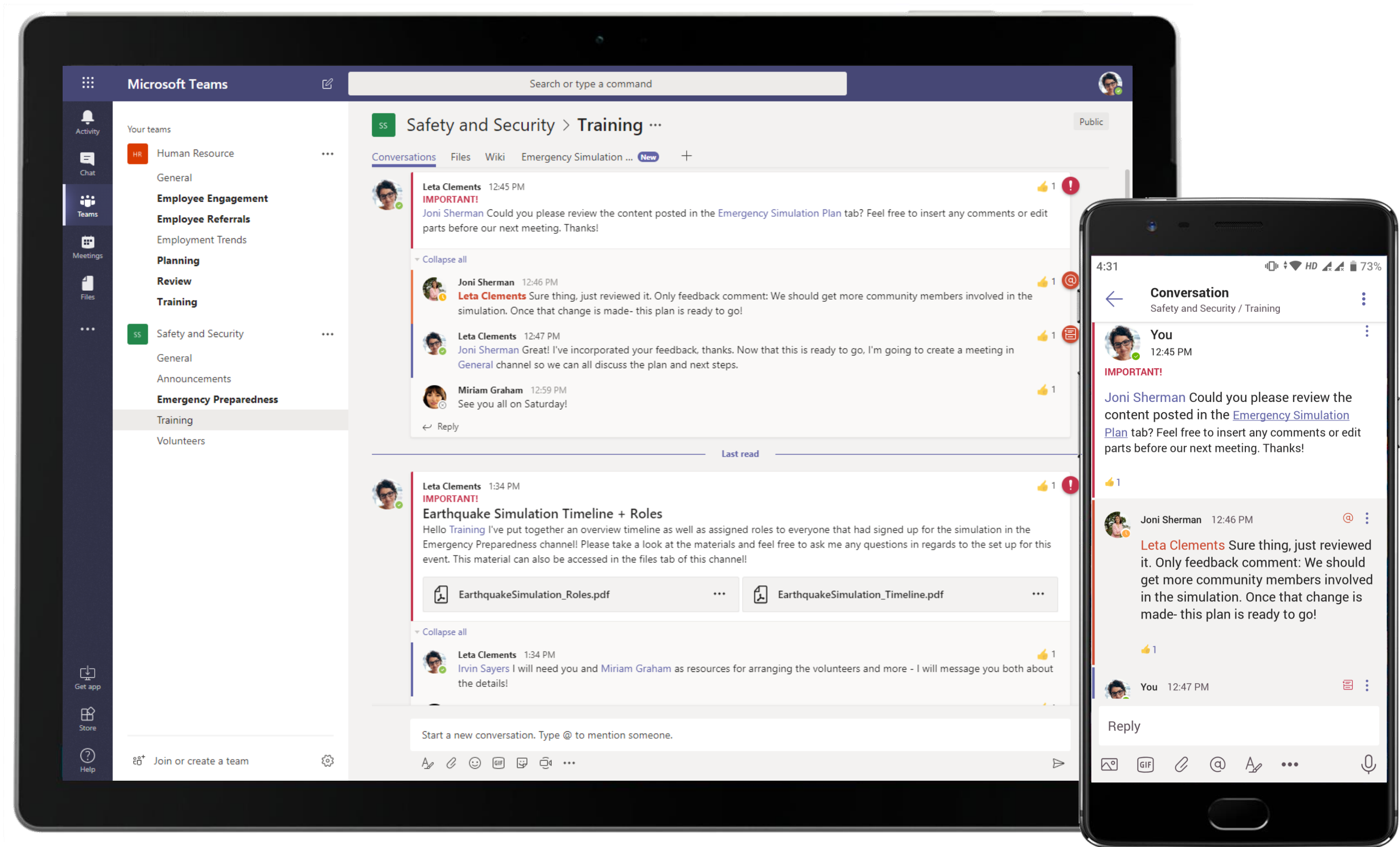
- Creates a collaborative OneNote tab which lays out a comprehensive plan of what her team needs to do in the event of an earthquake.
- Invites team members and security personnel to edit the plan.
- Freezes the edits and holds a channel meeting to alert department heads.
- Creates a conversation alerting everyone to the upcoming simulation and blocks calendar date for simulation.
- Creates an Emergency Preparedness channel and adds managers to capture their POCs and have their employees sign up for the simulation using a Forms tab.
- Assembles volunteers for the event with Forms and runs simulation successfully.

How did Teams help the Director execute her roles and responsibilities?

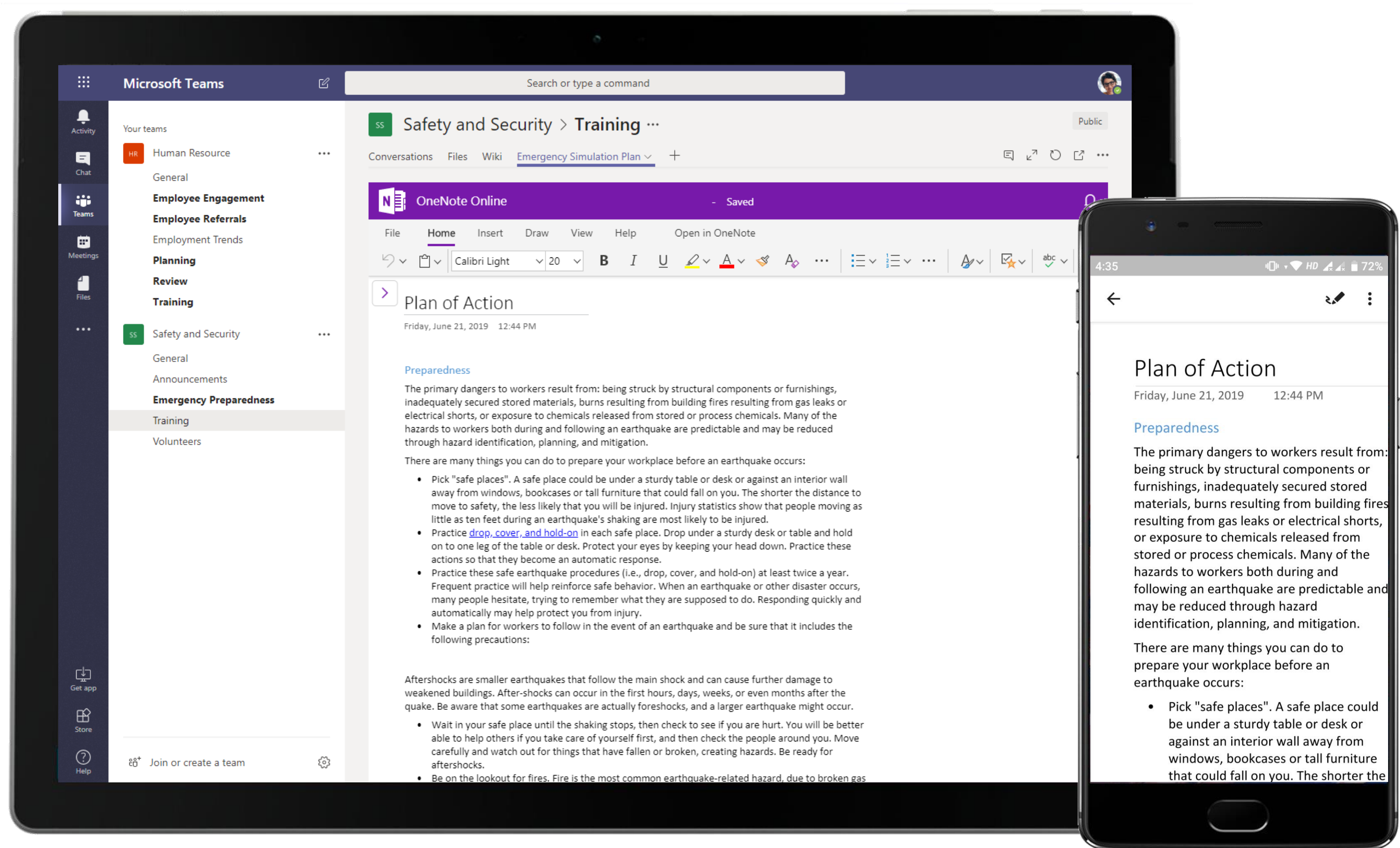
- Gather meeting notes in OneNote.
- Everyone on your team is aware of upcoming events with group calendar integration.
- Keep track of volunteer sign ups and many other forms with Forms.
- Broadcast important updates to the entire organization with Company Communicator.

Which app integrations on Teams made it possible?

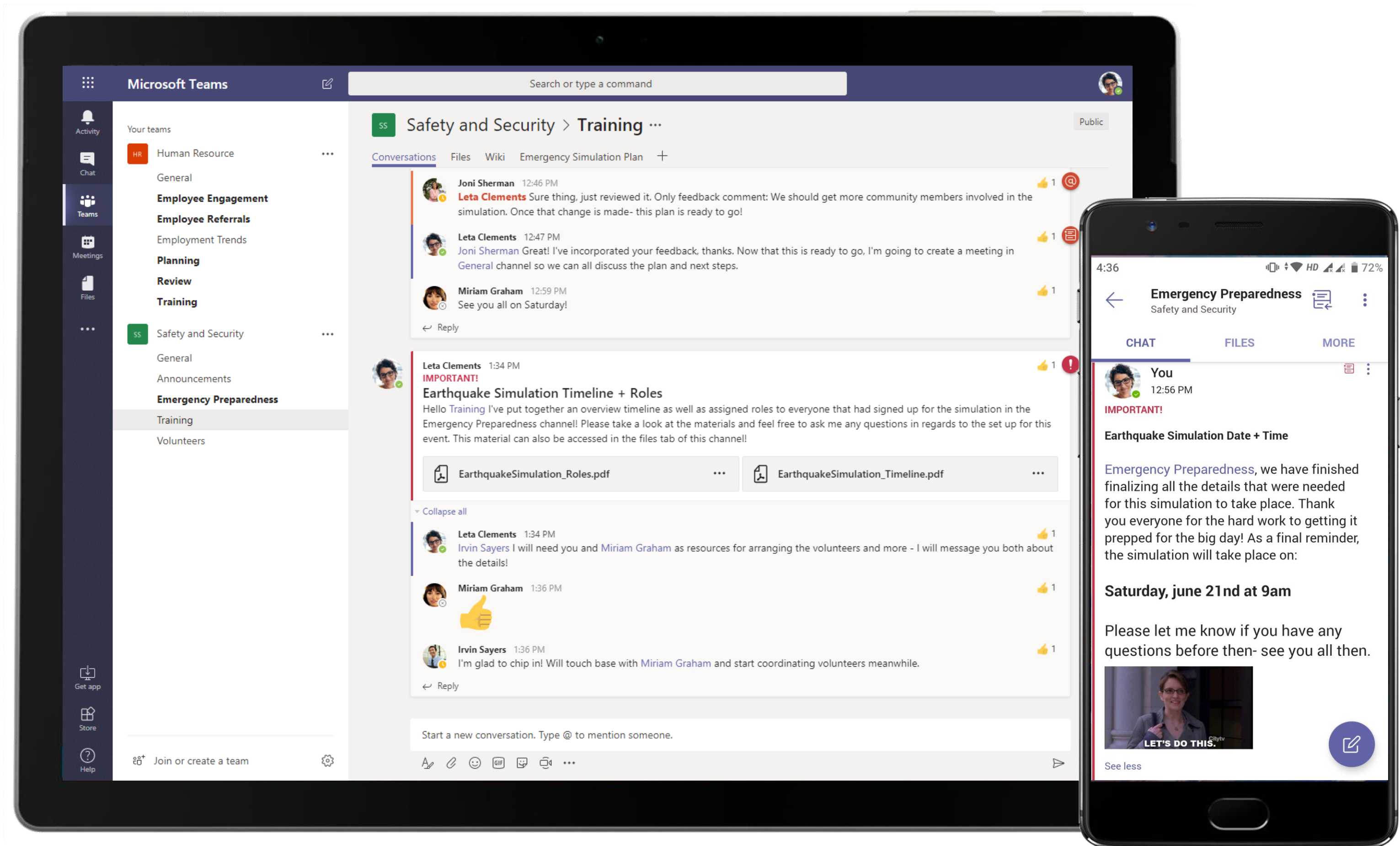




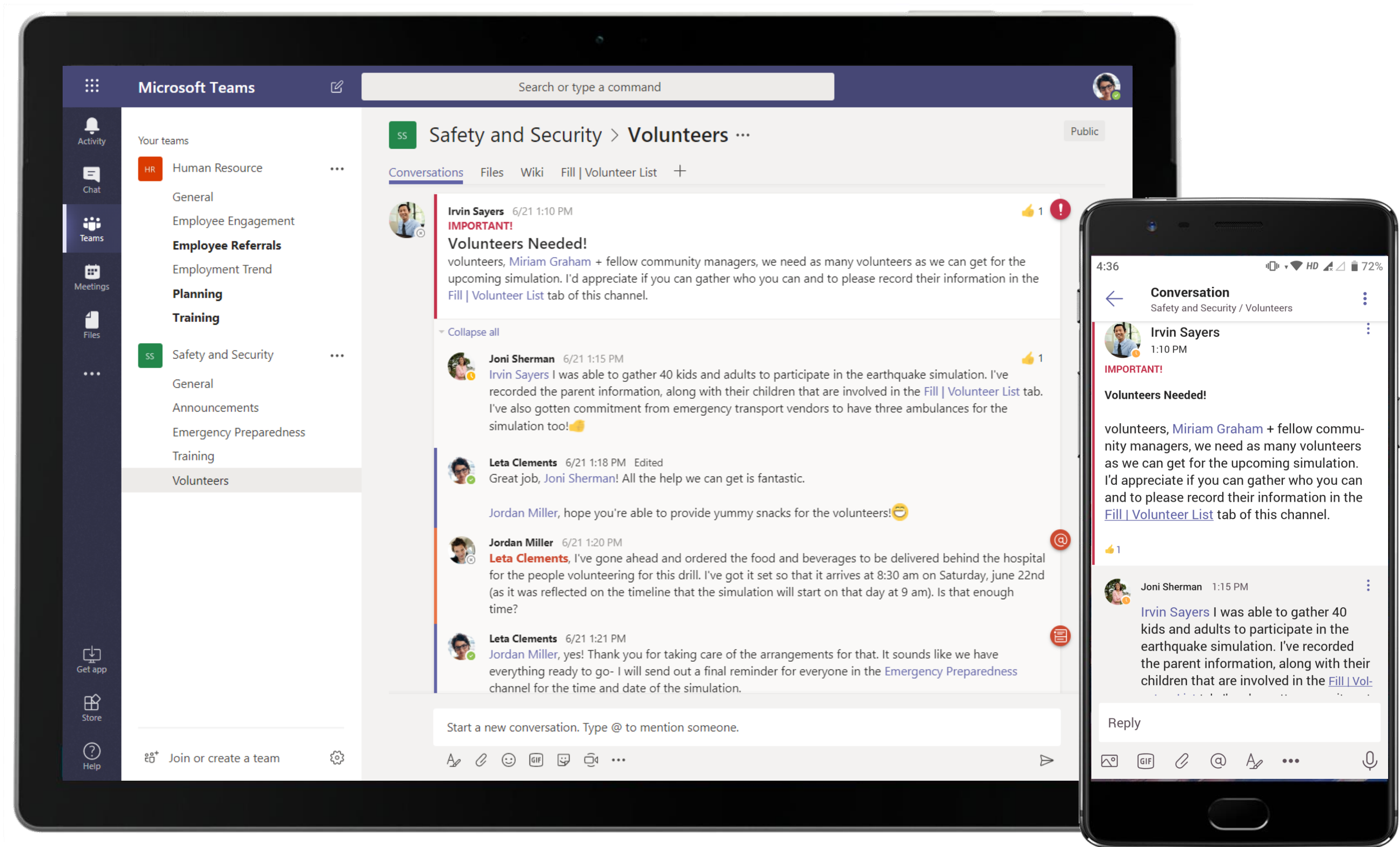
The Director uses a dedicated team to prepare and collaborate on a plan of action before major events. Adding members and guests to the team helps her collaborate efficiently with her team from any location.



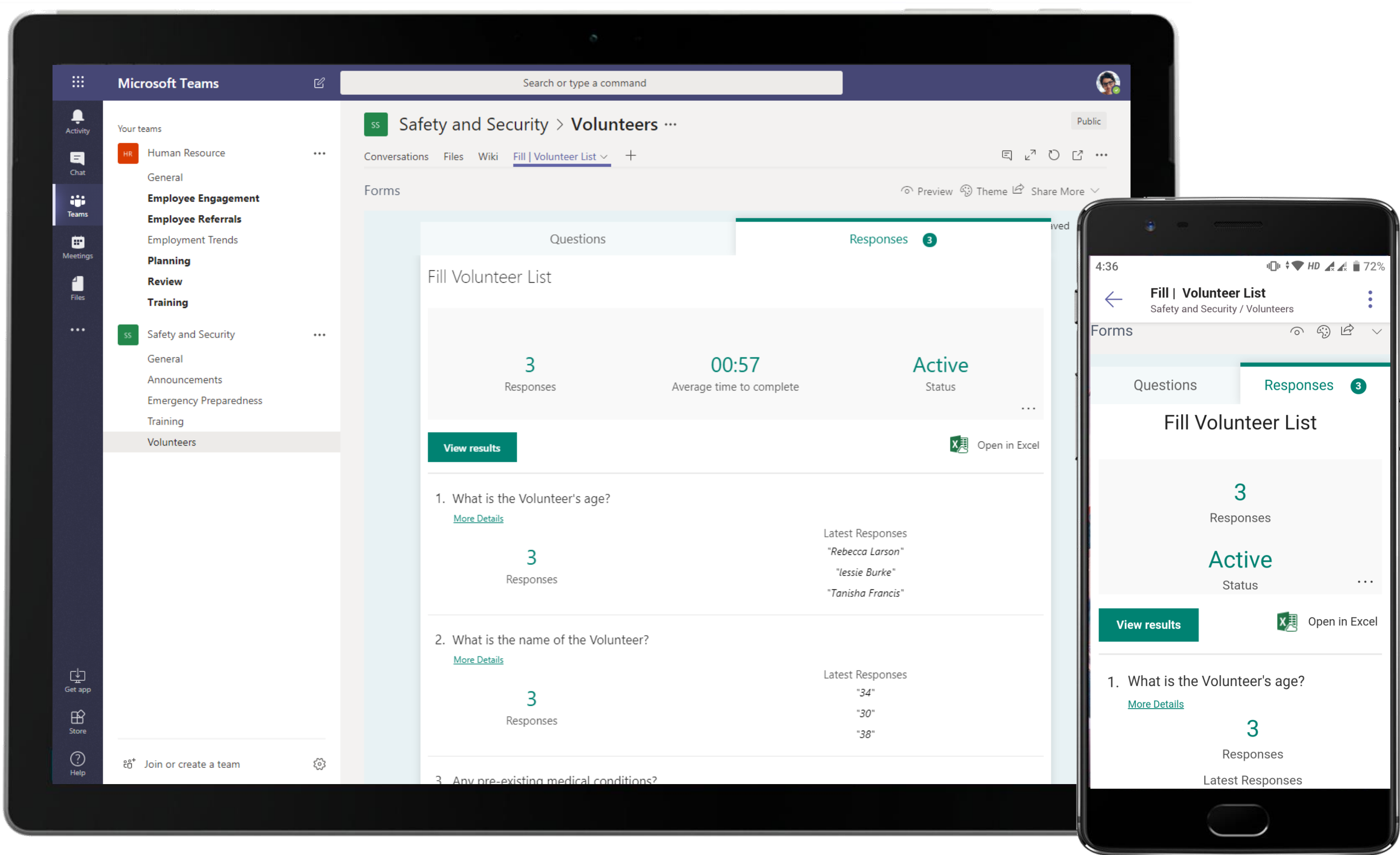
Once the Director adds the OneNote tab to the channel, team members will be able to view and add notes. As it becomes a breeze to share ideas, channel conversations in the context of OneNote tab enables collaboration.



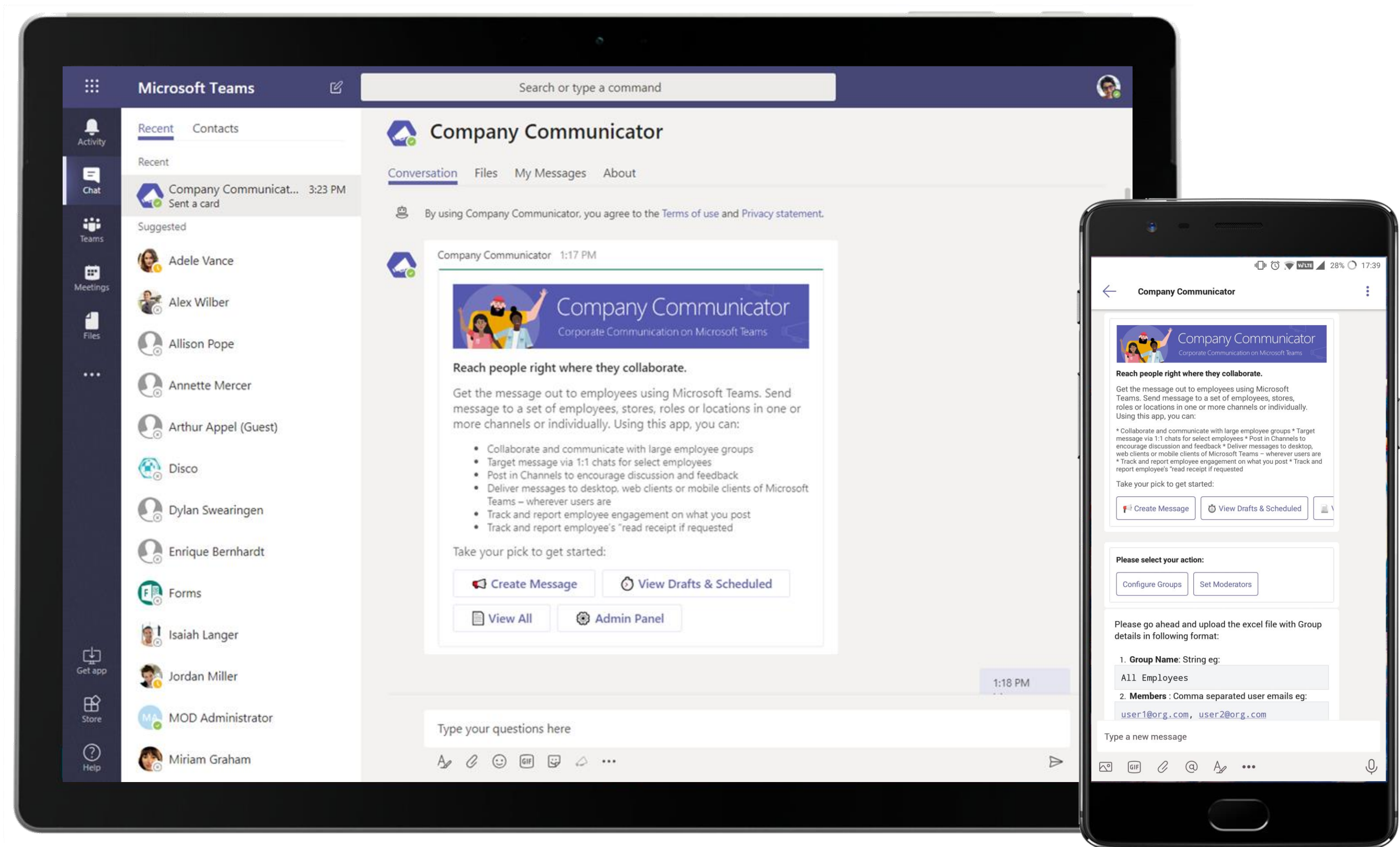
The Director uses channel communication to keep her team apprised of the progress of the simulation. Channel conversations are a great way to keep your core team engaged for planning and disseminating information.



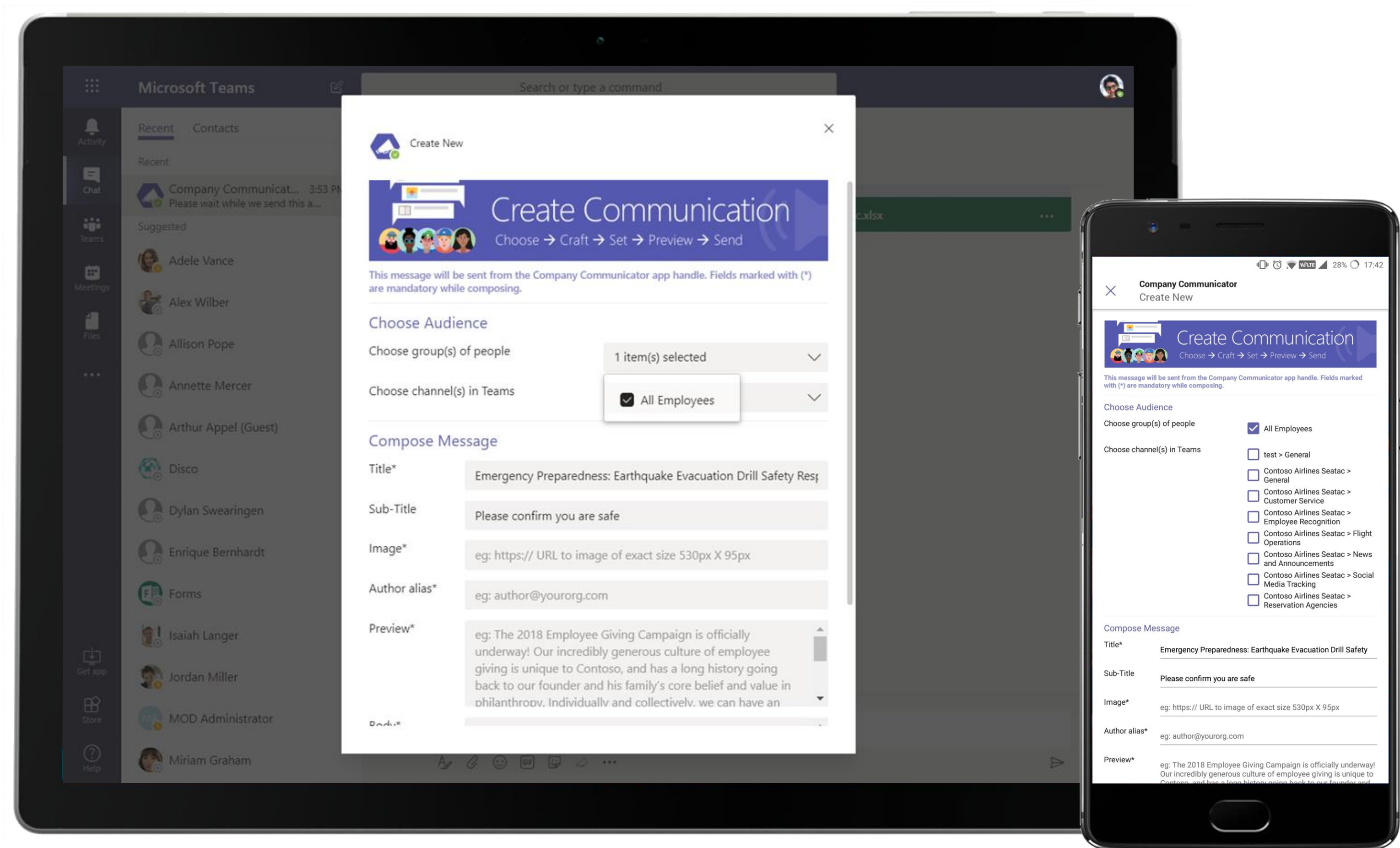
Use a Forms tab in the channel to record information and keep the information easily accessible for other team members. Volunteer sign-up is made so much more convenient and in-the-moment pinning a form right inside Teams.



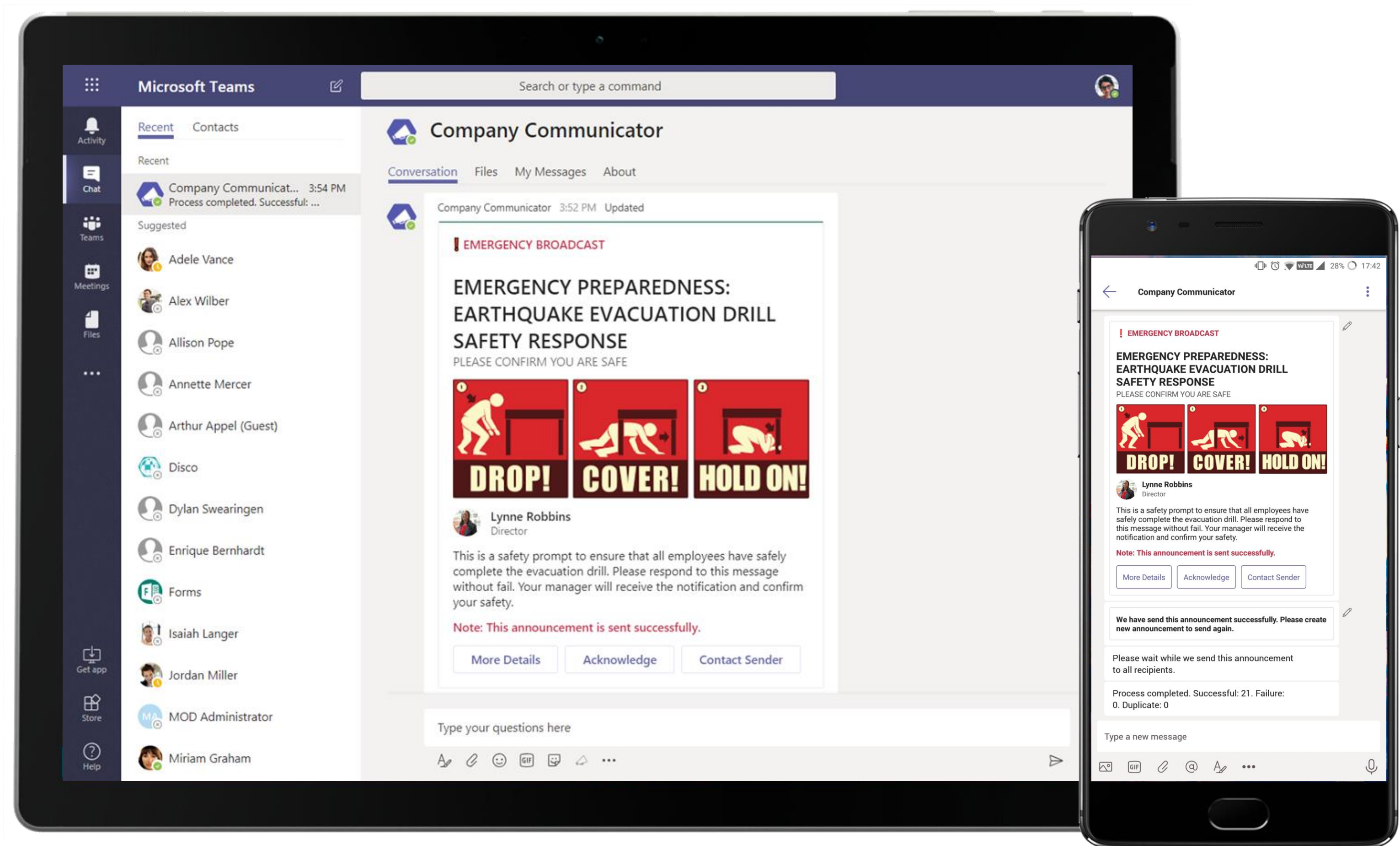
Here's more of what you can do with Forms: work with team members to create and edit a form, add an existing form to collect fresh responses, or share the responses you have collected from a form.



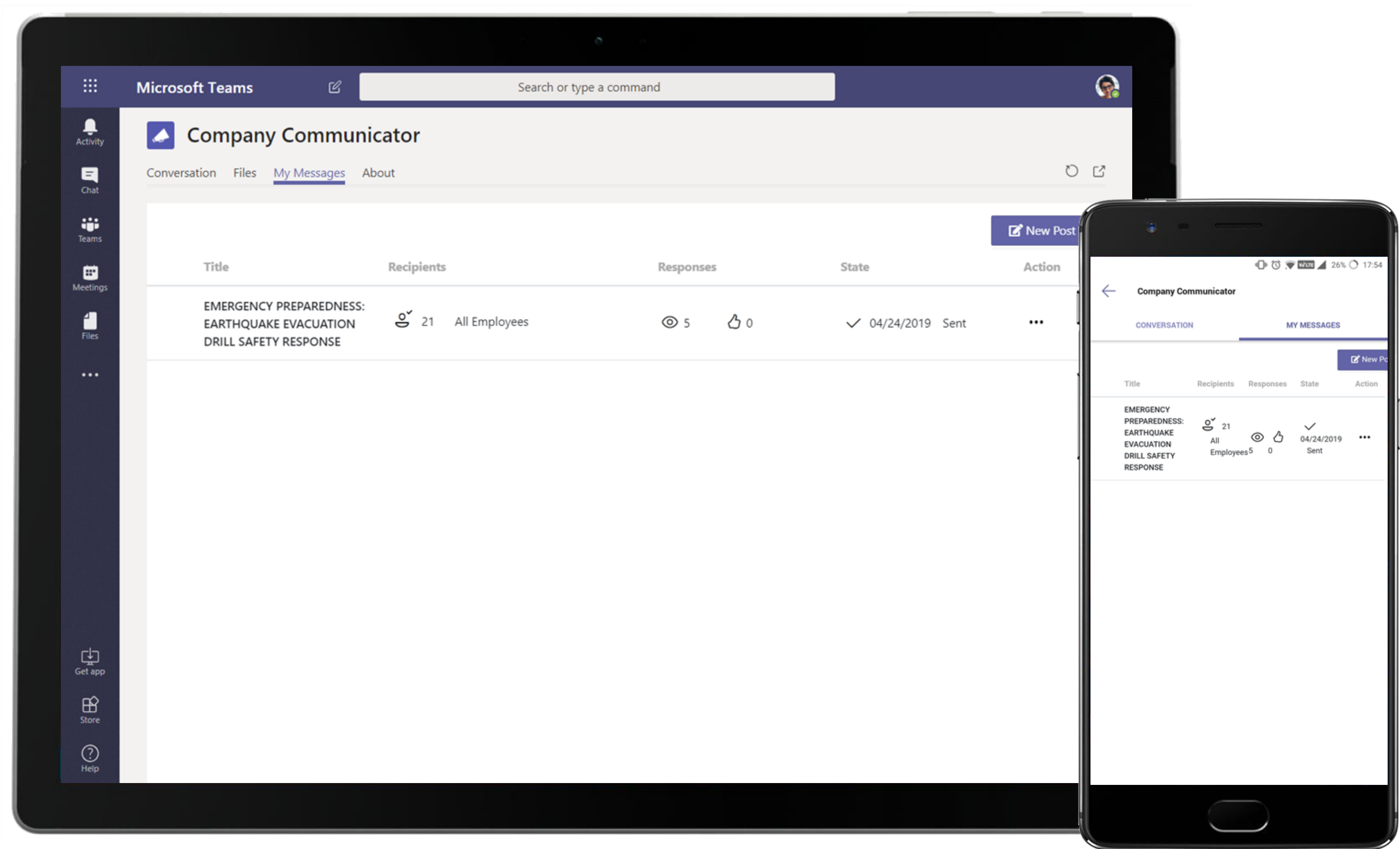
Get messages out to an employee or a set of employees in one or more team channels or individually.



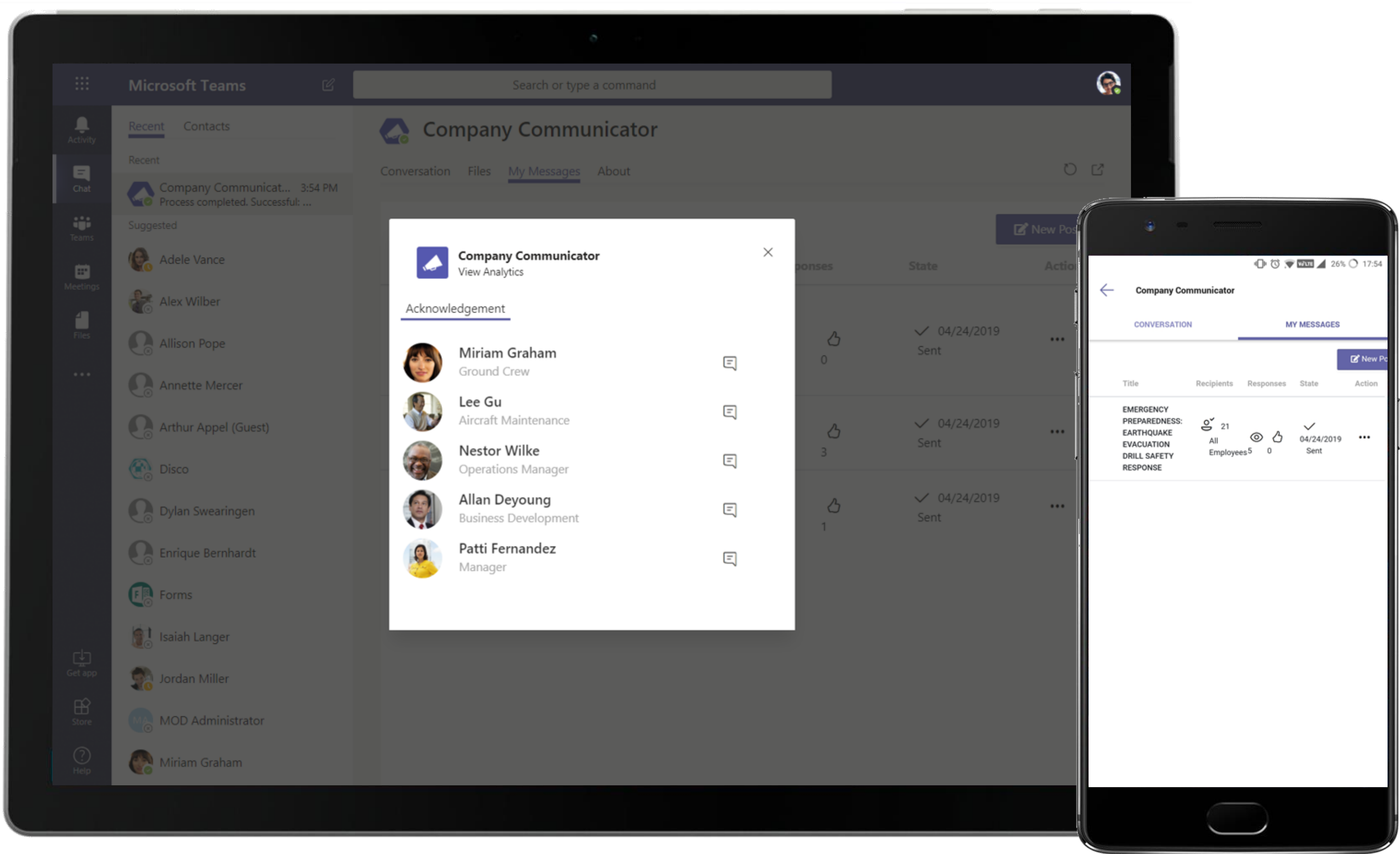
Reach your employees where they collaborate! The Company Communicator app arms your Microsoft Teams environment with corporate communication and group broadcast capabilities.



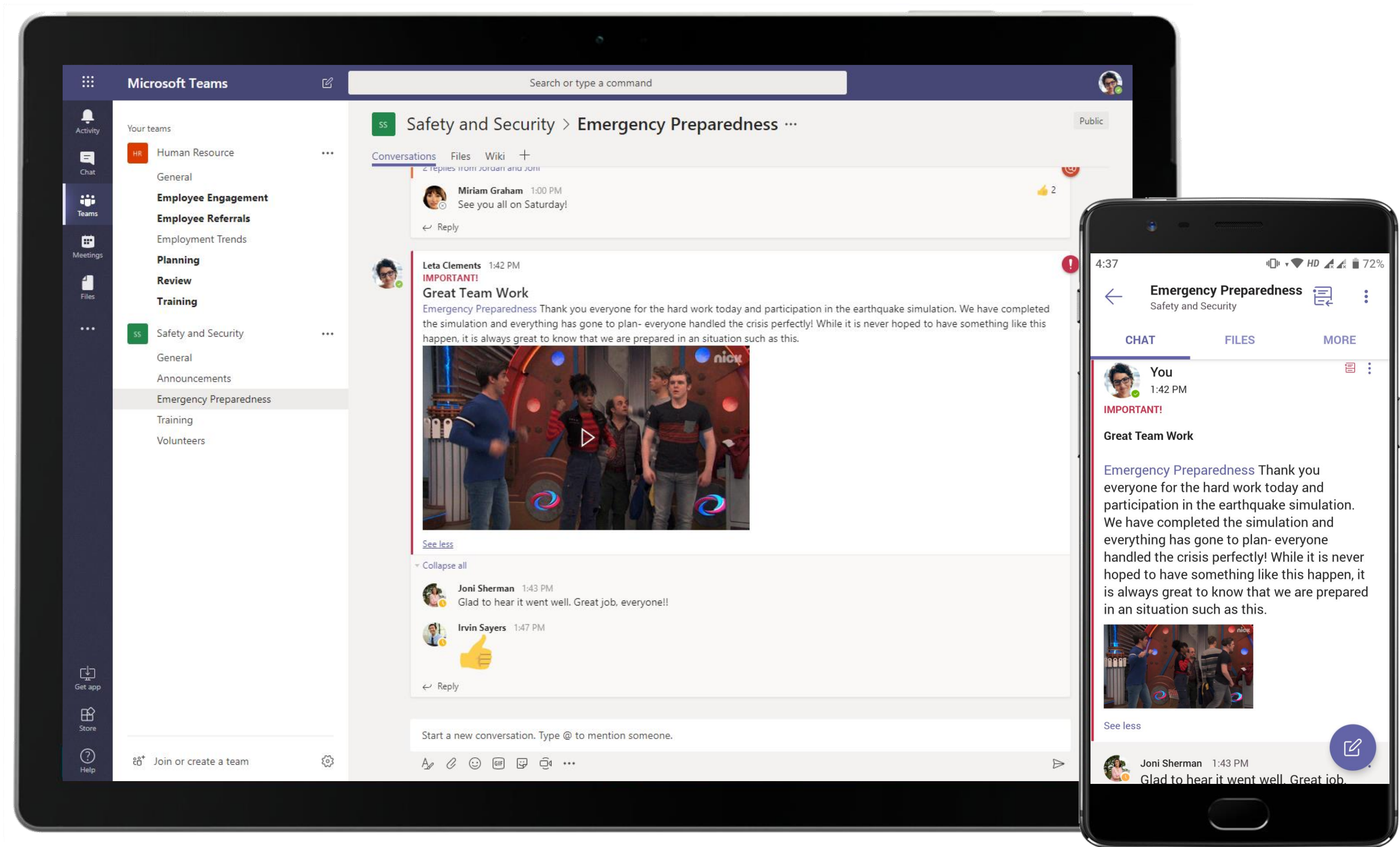
The creators can define user groups, compose a rich message, send or schedule messages, deliver to one or more employees.



Track read acknowledgement and view engagement analytics for each message sent seamlessly in a single app.



Track read acknowledgement and view engagement analytics for each message sent seamlessly in a single app.



Sum up results of collaborative efforts by letting team members know they've done well! The Director signs off on the emergency preparedness exercise by sending out a channel communication about the outcome of the drill.



Human Resources

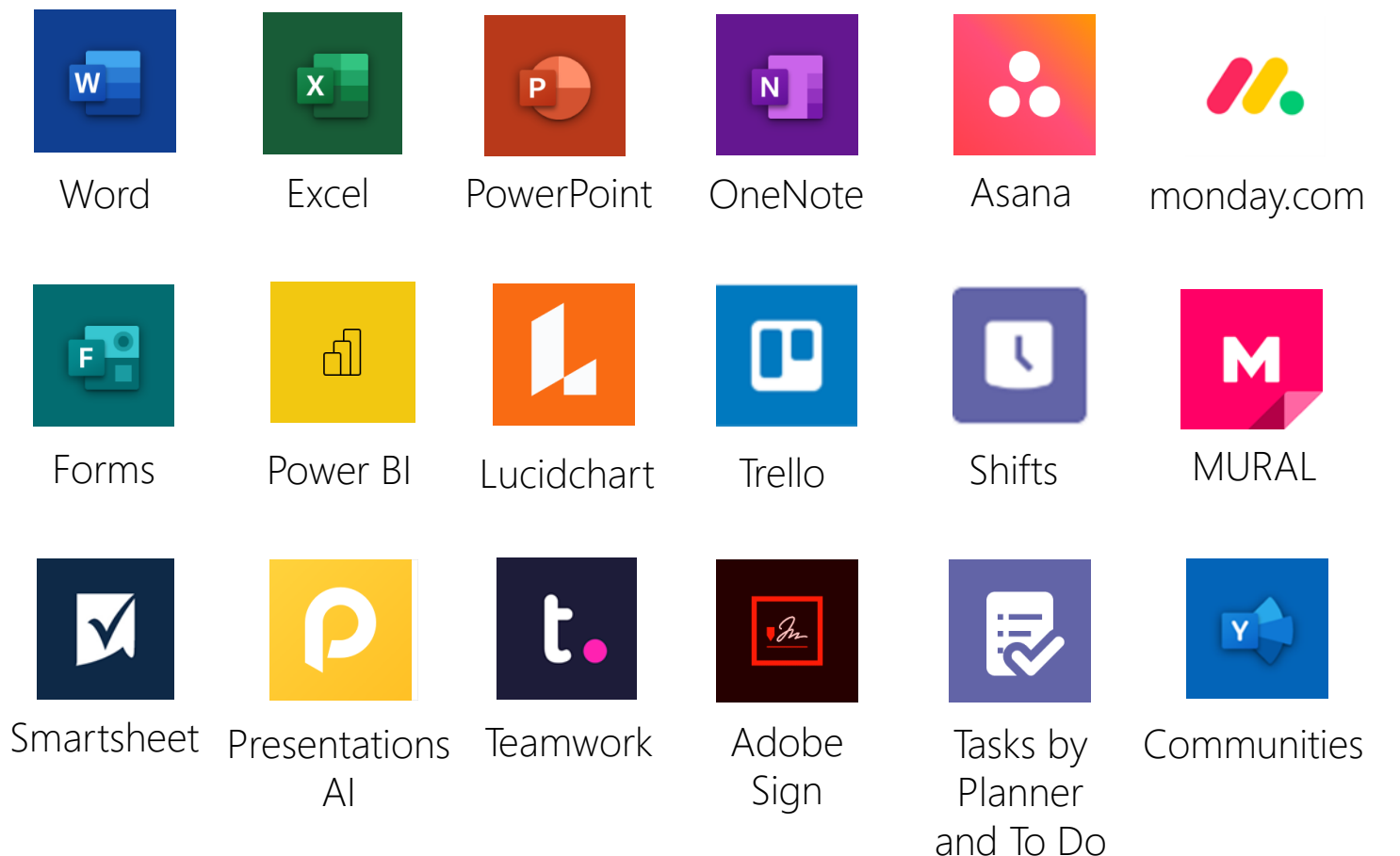
Check out how different HR personas in your organization ranging from HR Manager to the Talent Acquisition Team can boost daily productivity using Microsoft Teams.

HR Superpowers in Teams

Capabilities and Features used...

- Channel conversations that keeps everyone in loop
- 1:1 and group chats – conversations the way you want
- Real-time, contextual file sharing and co-authoring
- Channel Tabs for everyone to stay updated
- Real-time monitoring of external data/content

Apps that enable an immersive experience in Teams



Meet the Business Decision Makers

Human Resources



HR Manager

"I believe the work environment should be a safe and conducive space to do one's best."

- Develop and implement HR initiatives aligned with overall business strategy
- Bridge management and employee relations by addressing demands, grievances or other issues



HR Business Partner

"Employee engagement is not easy when they're spread across multiple locations. Teams helps me reach out and stay connected with employees."

- Maintain human resource records for employees
- Engage in hiring and recruitment activities
- Undertake employee engagement activities



Hiring & Training Manager

"Hiring and induction programs for new employees are core functions of my job. We want to attract the best talent at Contoso."

- Create induction programs for new hires and conduct employee training programs
- Counsel managers on candidate selection
- Maintain job requirements and job descriptions for all positions

Meet the Business Decision Makers

Human Resources



Director

"Diversity means including people with different perspectives, different experiences, different opinions and perhaps different working styles."

- Set and achieve organization's goals and objectives
- Account for the company's activities to relevant parties, e.g. shareholders
- Oversee senior management efforts and coordinate with department heads



Analyst

"I am convinced that nothing we do is more important than hiring and developing people. At the end of the day you bet on people, not on strategies."

- Guide organizational efforts on diversity and inclusion
- Direct training initiatives on cultural competency, gender differences, disability and sexual harassment
- Assess equal opportunity issues and progress through periodic reports



UX Designer

"When UX doesn't consider all users, shouldn't it be known as 'Same User Experience' or SUX."

- Conduct concept and usability testing and gather feedback
- Define the right interaction model for applications and evaluate its success
- Develop wireframes and prototypes around customer needs



Strengthening the Workplace Community

HR Manager

Scenario Walkthrough

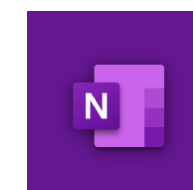
When employee morale is at risk due to baseless rumors of the Contoso closing its business, the HR Manager relies on Microsoft Teams to effortlessly connect and communicate with employees to ease their concerns and foster a strong workplace community.

- Engages team member to gather organizational negative perceptions in a OneNote channel tab.
- Sets up a channel meeting to show team members the articles and news online that have fueled the rumors.
- Uses Freehand by InVision app to brainstorm a solution with her team to lower employee attrition and to improve moral.
- Schedules a live townhall to make positive announcements about the organization and to assuage doubts.
- Encourages employees to send their questions and concerns to her through a new feedback channel using Forms.

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

- Enable multi-channel communication through 1:1 chat, channel conversations and video/audio conferences with team members.
- Hold protected calls and conferences and share screens with enterprise security.
- Collaborate, ideate and draft solutions with team members in real-time by using an array of applications hosted in the Teams store, e.g. Freehand by InVision.
- Engage your organization with live events and Q&A sessions in Teams.
- Engage employees and gather immediate response for surveys and feedback with Forms.

Which app integrations on Teams made it possible?



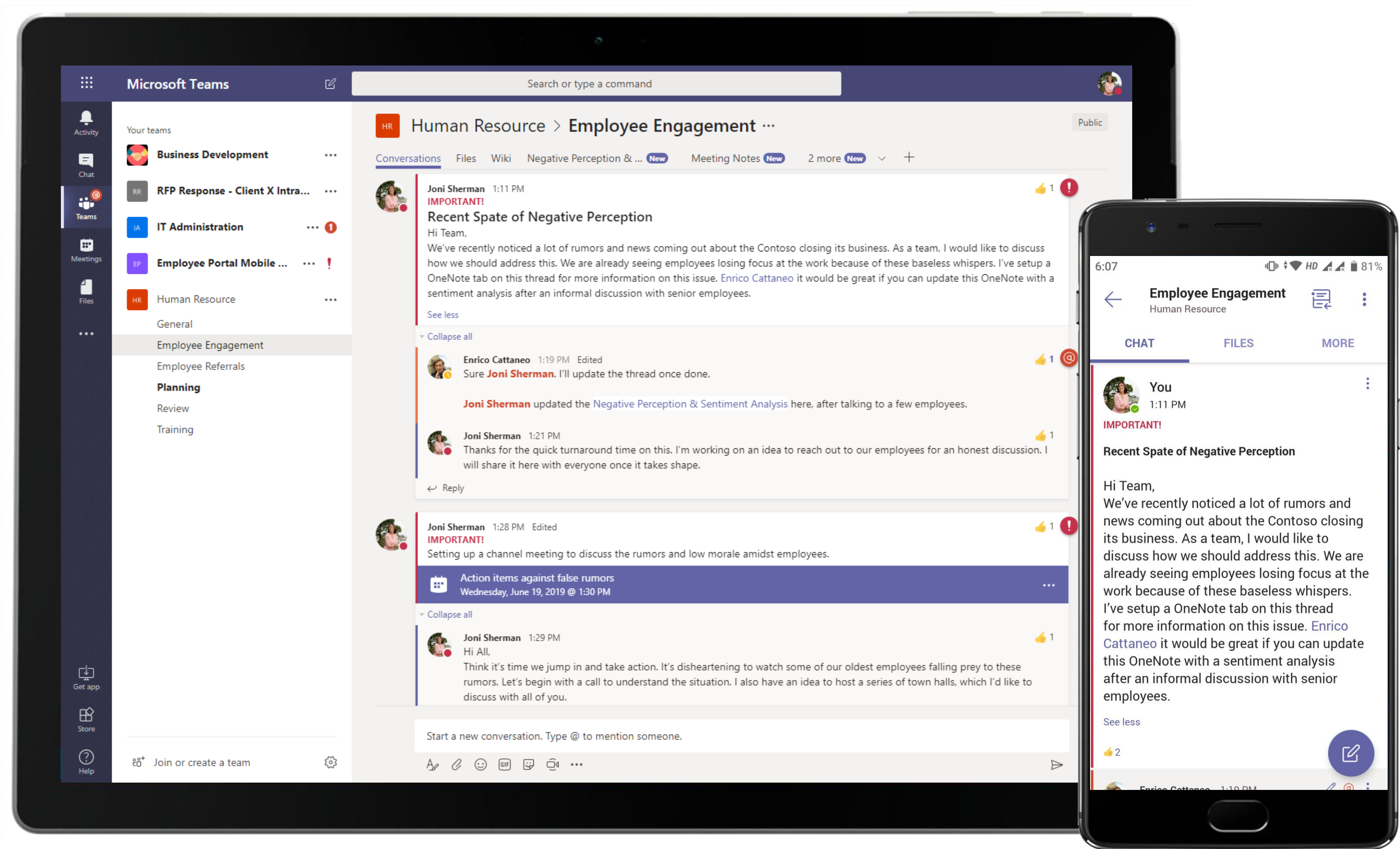
OneNote



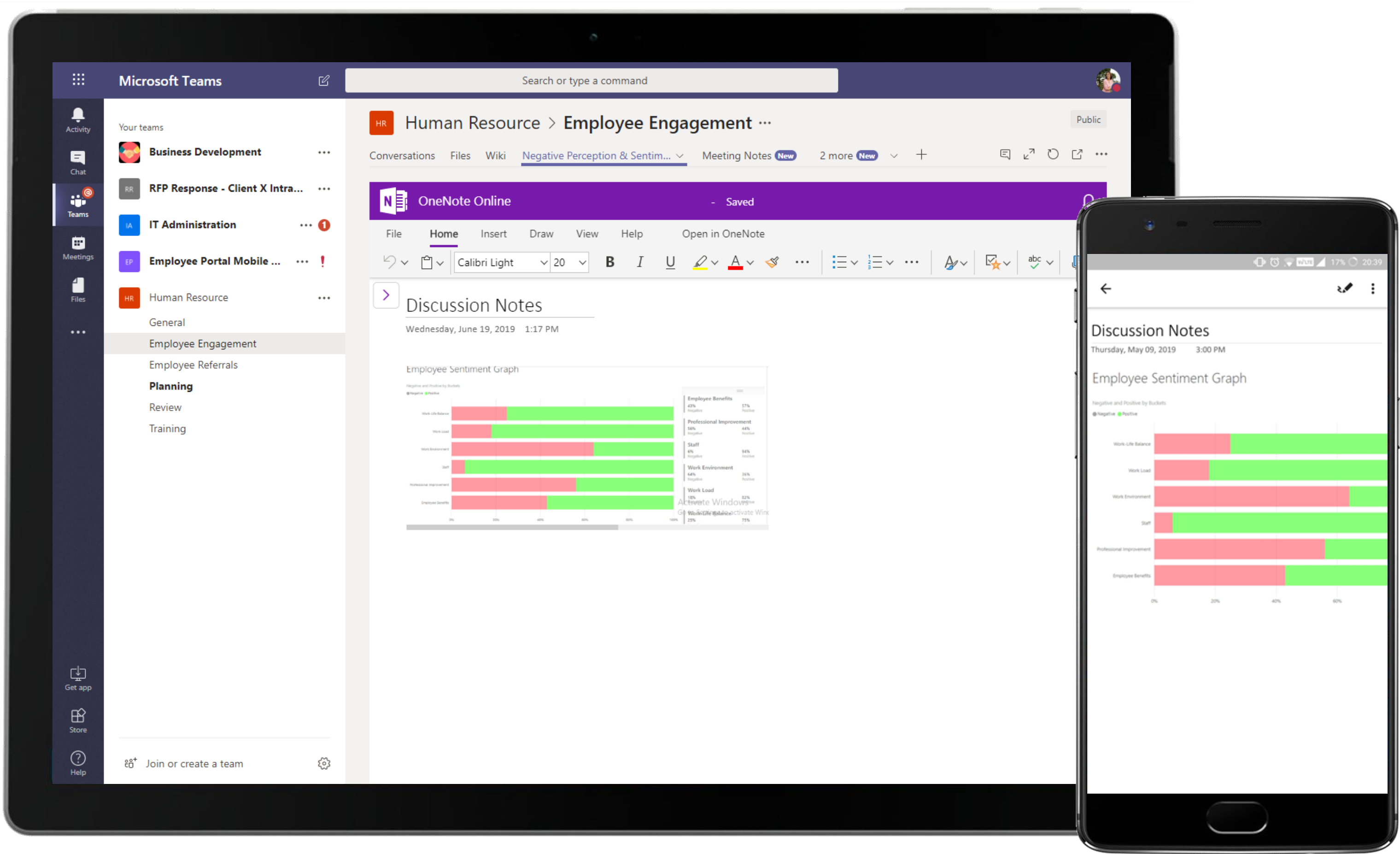
Freehand
by InVision



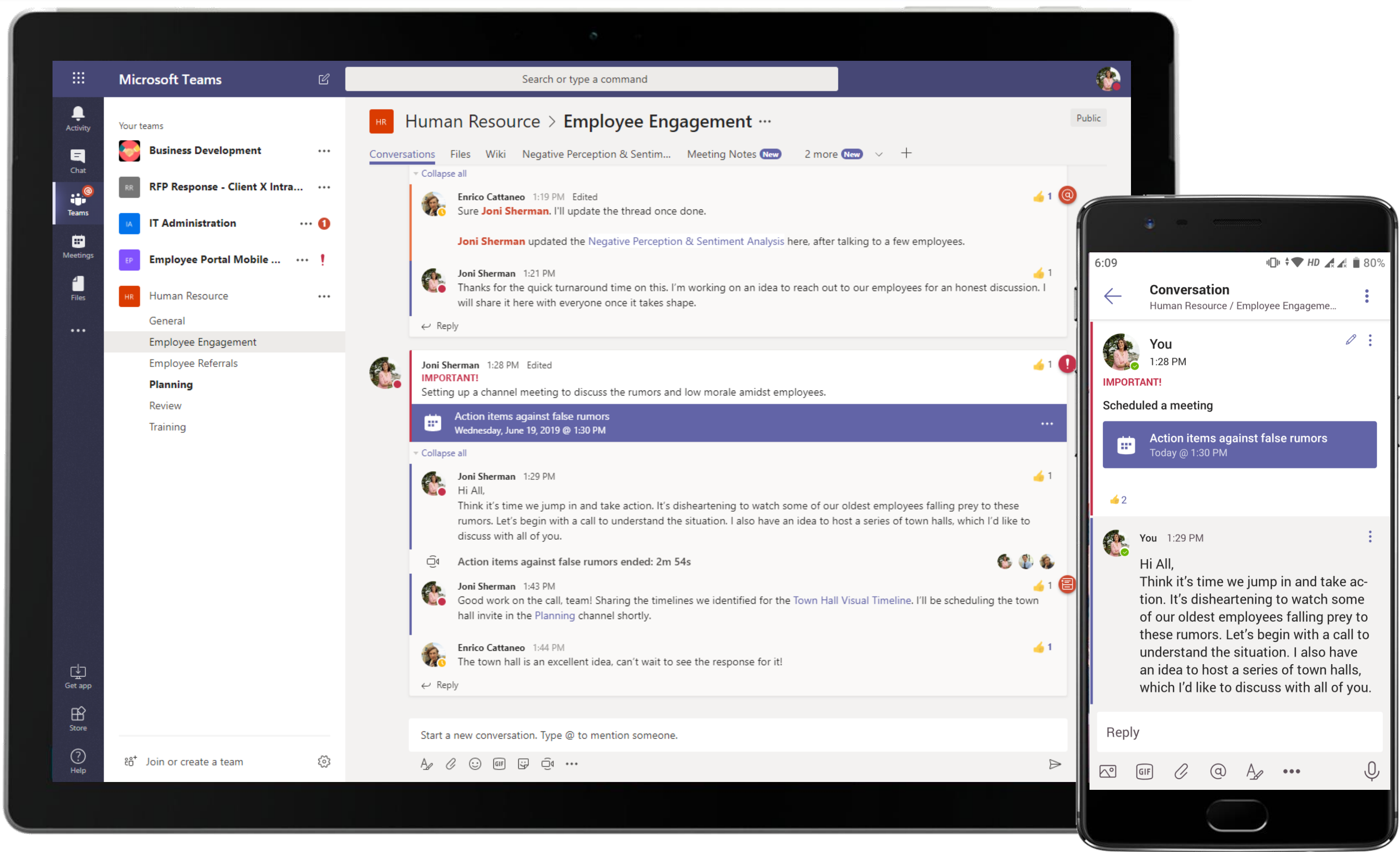
Forms



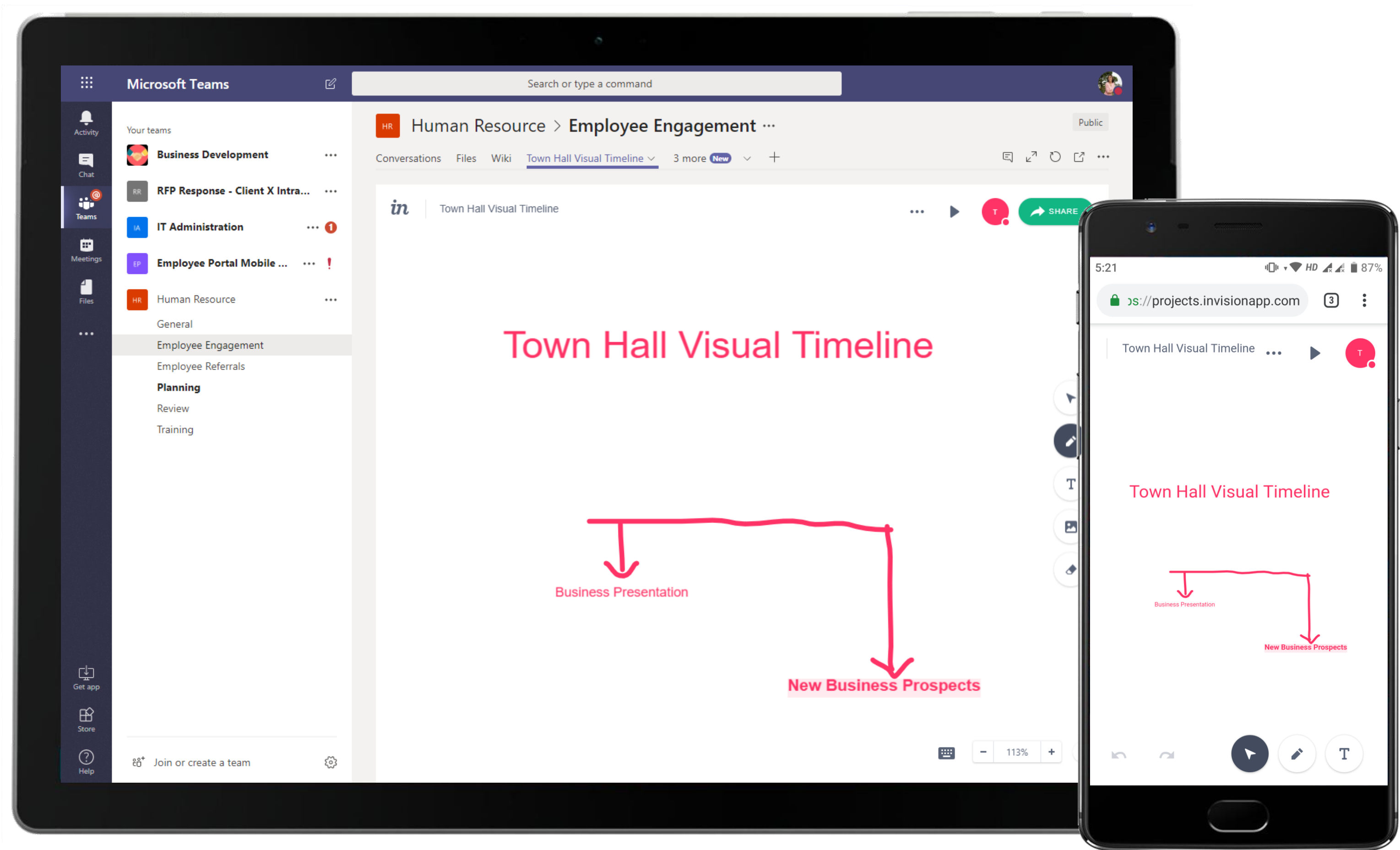
Get started with conversations to gain your team’s perspective on trends you see within the organization. Microsoft Teams provides both a communication platform as well as a community to engage and talk to employees.



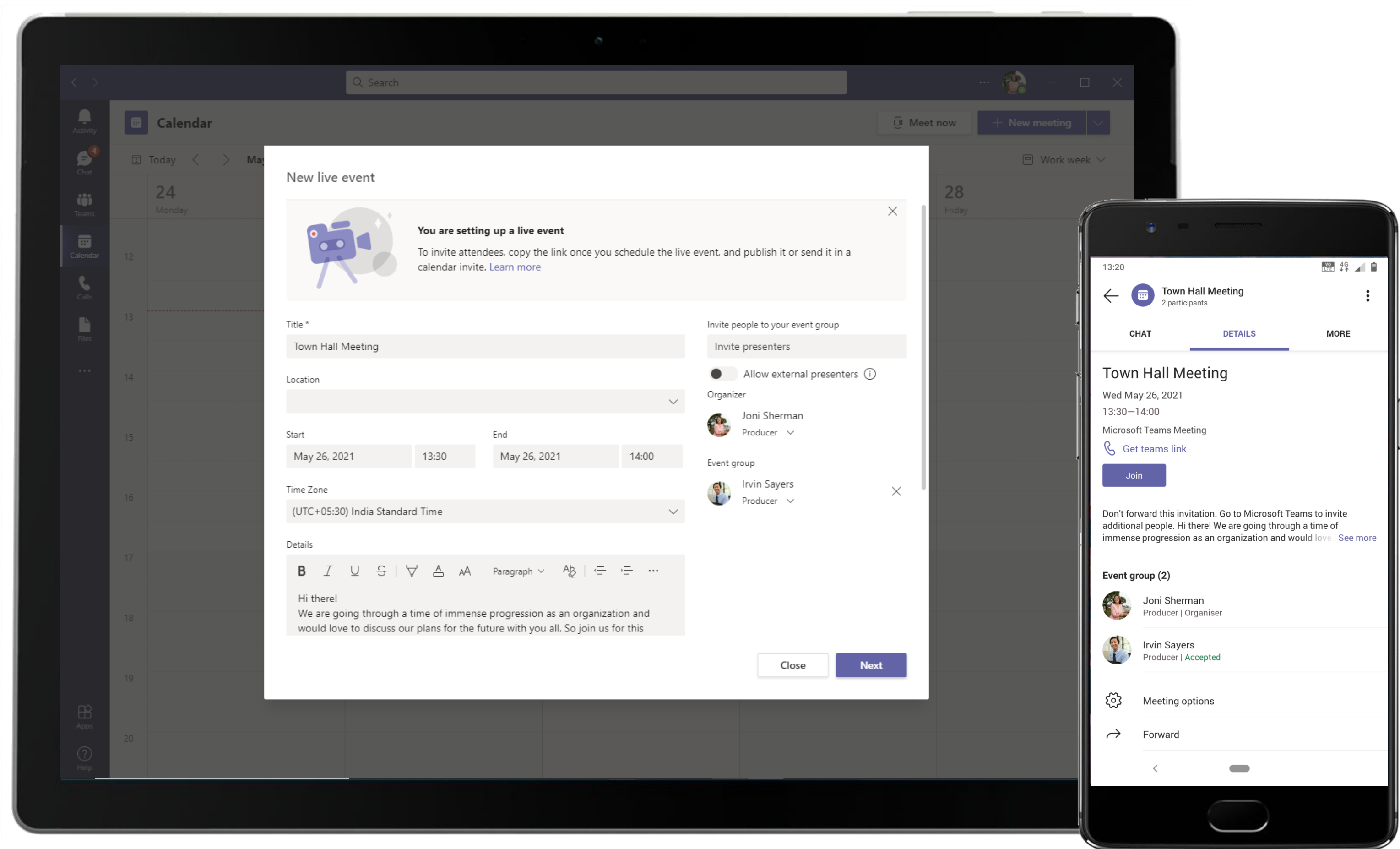
A team member uses OneNote to host and share the negative perceptions from different parts of the organization. The findings are easily presented to the HR Manager for her review and next steps are discussed.



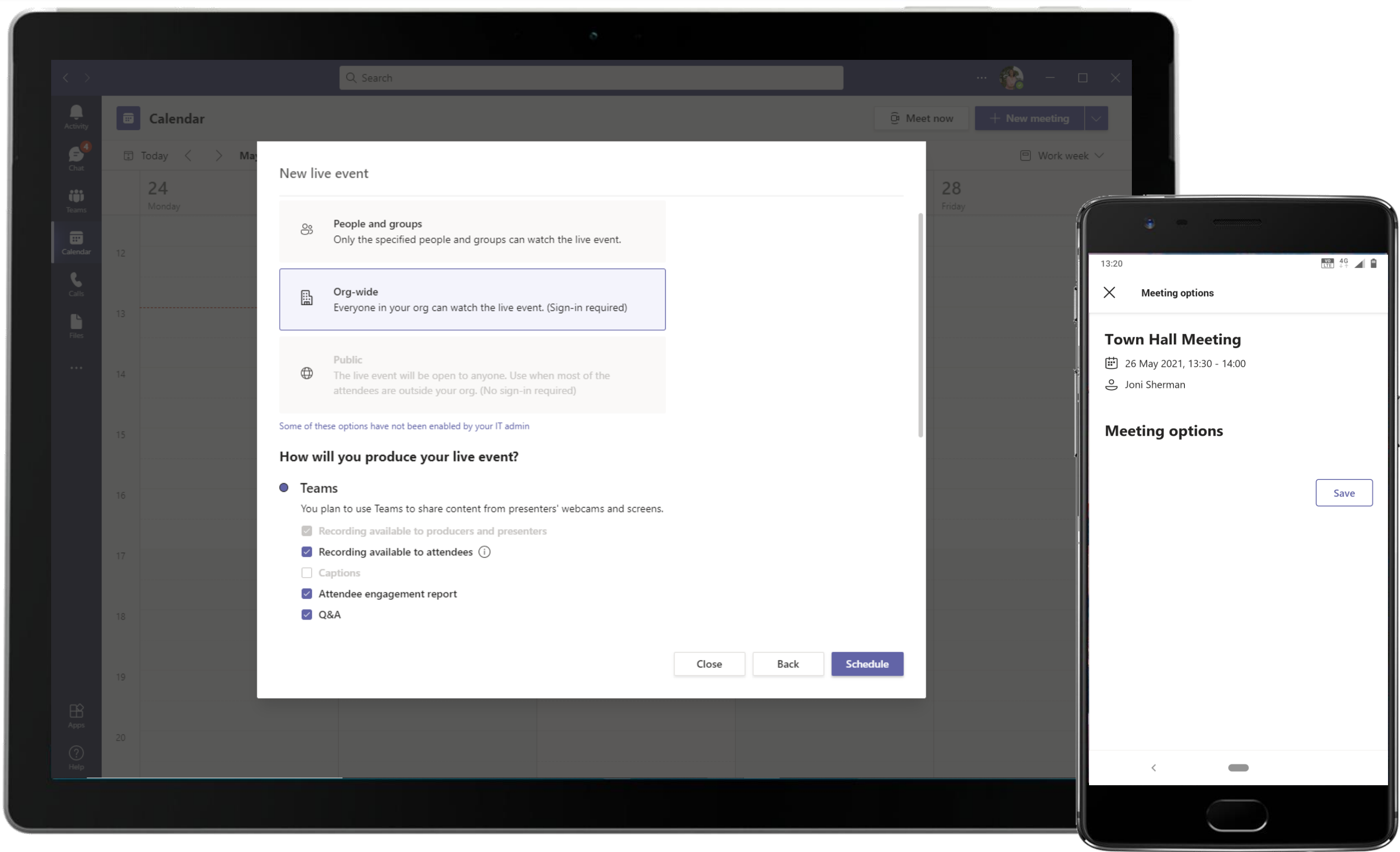
Enjoy protected meetings and screen share using Microsoft Teams. Communicate in open-channel conversations to capture meeting notes, plan action items and strategize with team members to address the issue.



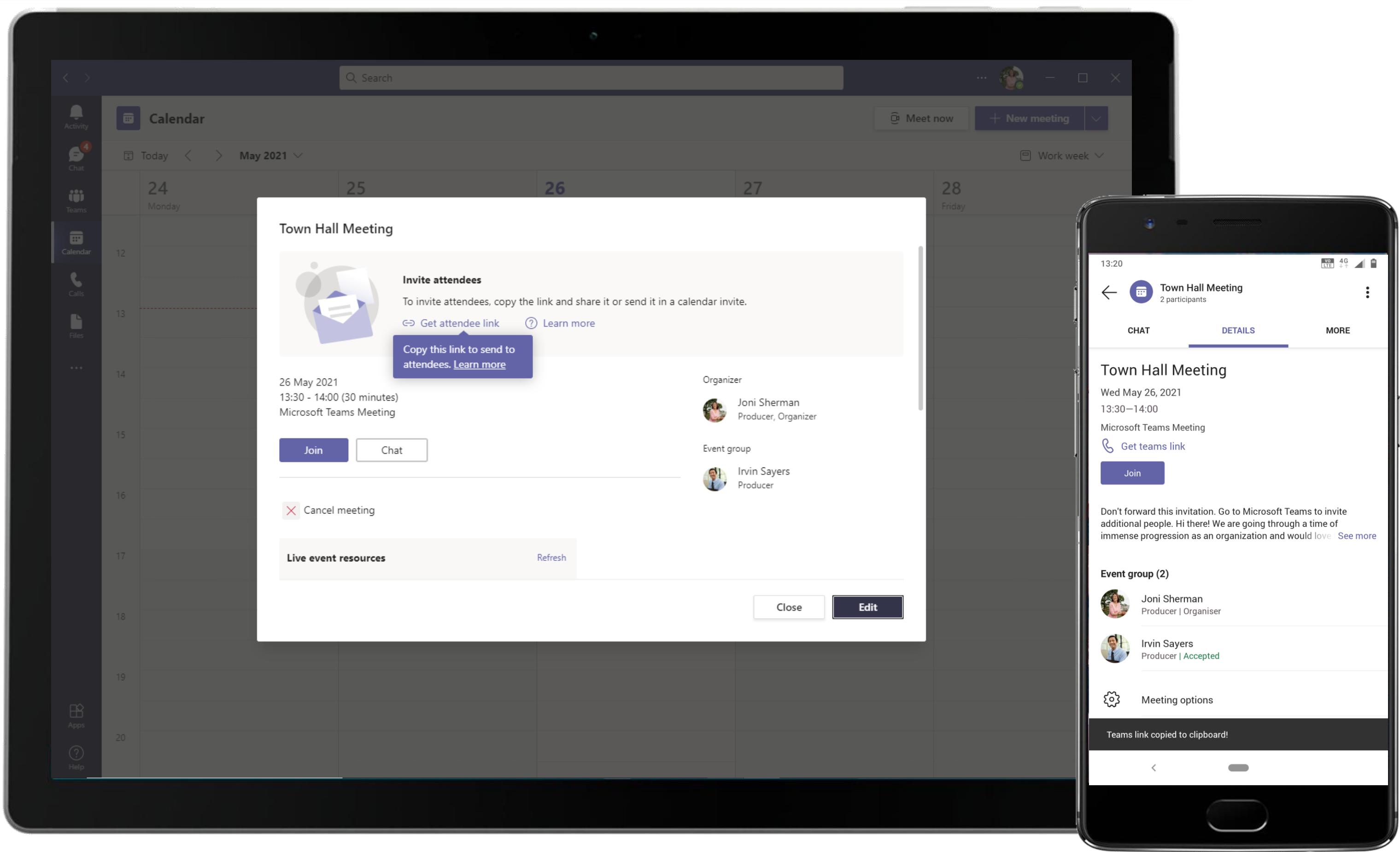
Collaborate, ideate and draft solutions on an infinite white boarding space with the Freehand by InVision app in Teams. The HR Manager uses the app to visualize a town hall schedule with her team.



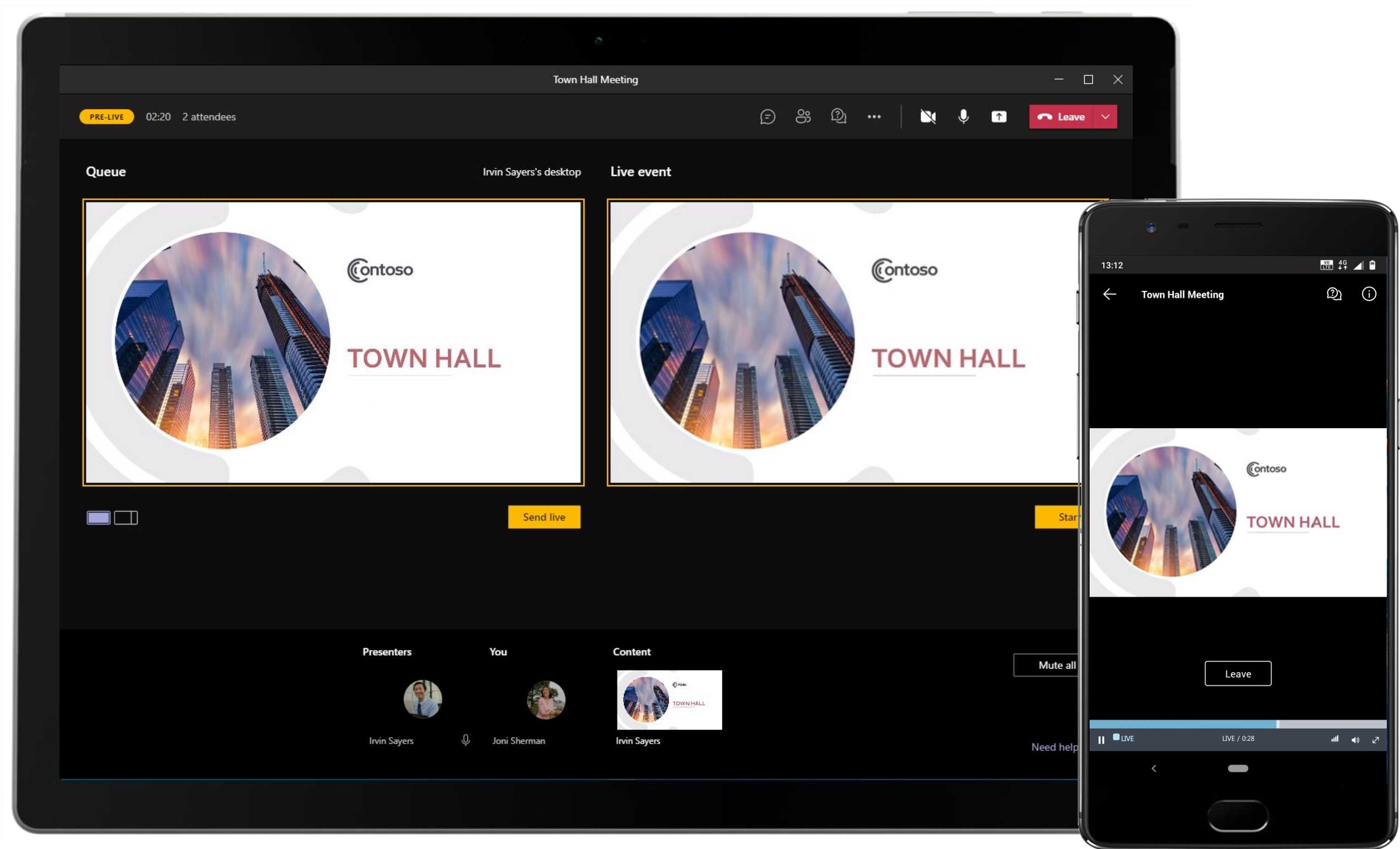
Microsoft Teams live events are an extension of Teams meetings that enable you to schedule and produce events that stream to large online audiences. The HR Manager uses the live events feature to schedule an event.



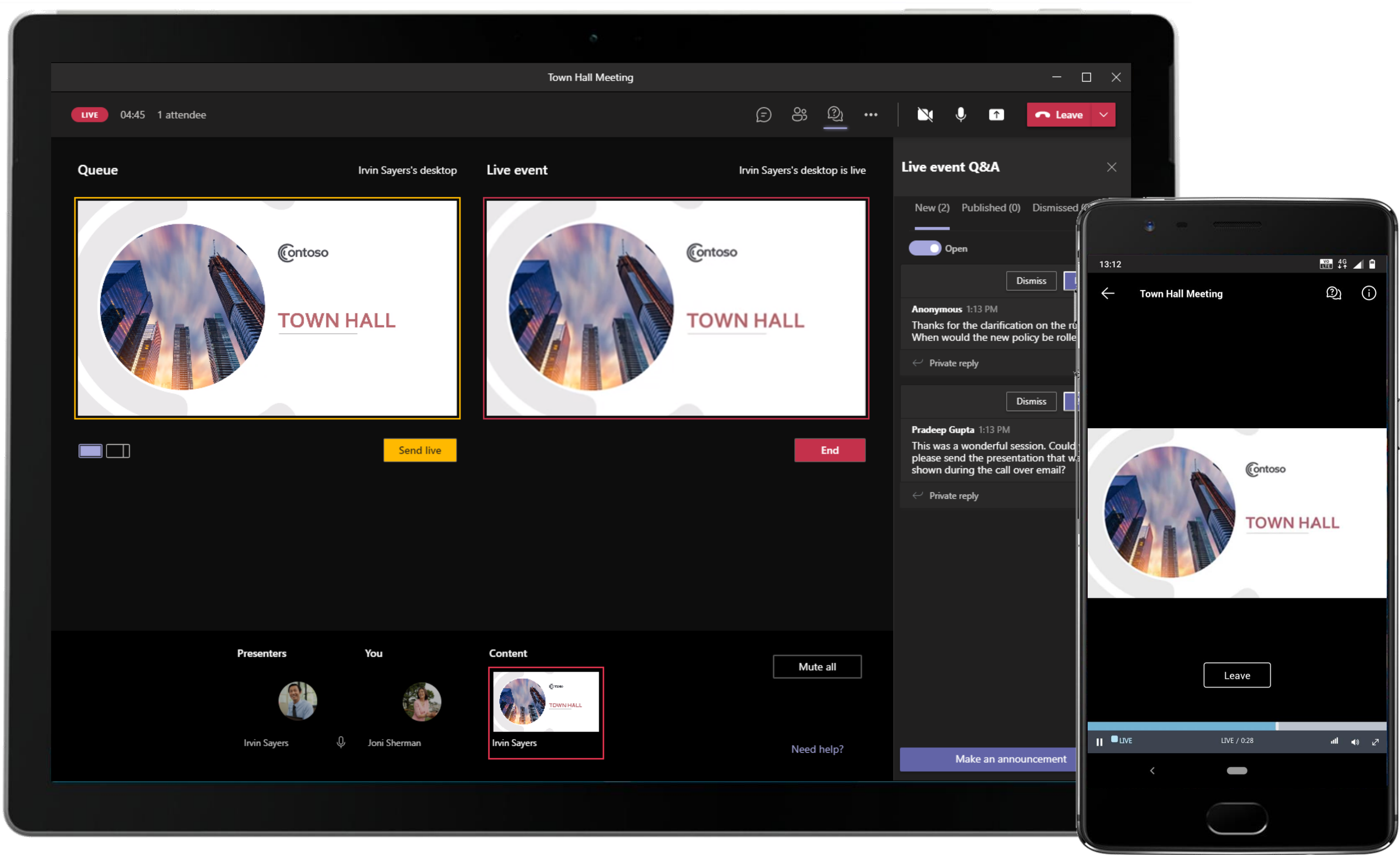
Microsoft Teams is a great way to schedule meetings and live events, especially if the participants don't all work in the same geographic area. It seamlessly integrates scheduling, invitations, updates and access to virtual meetings.



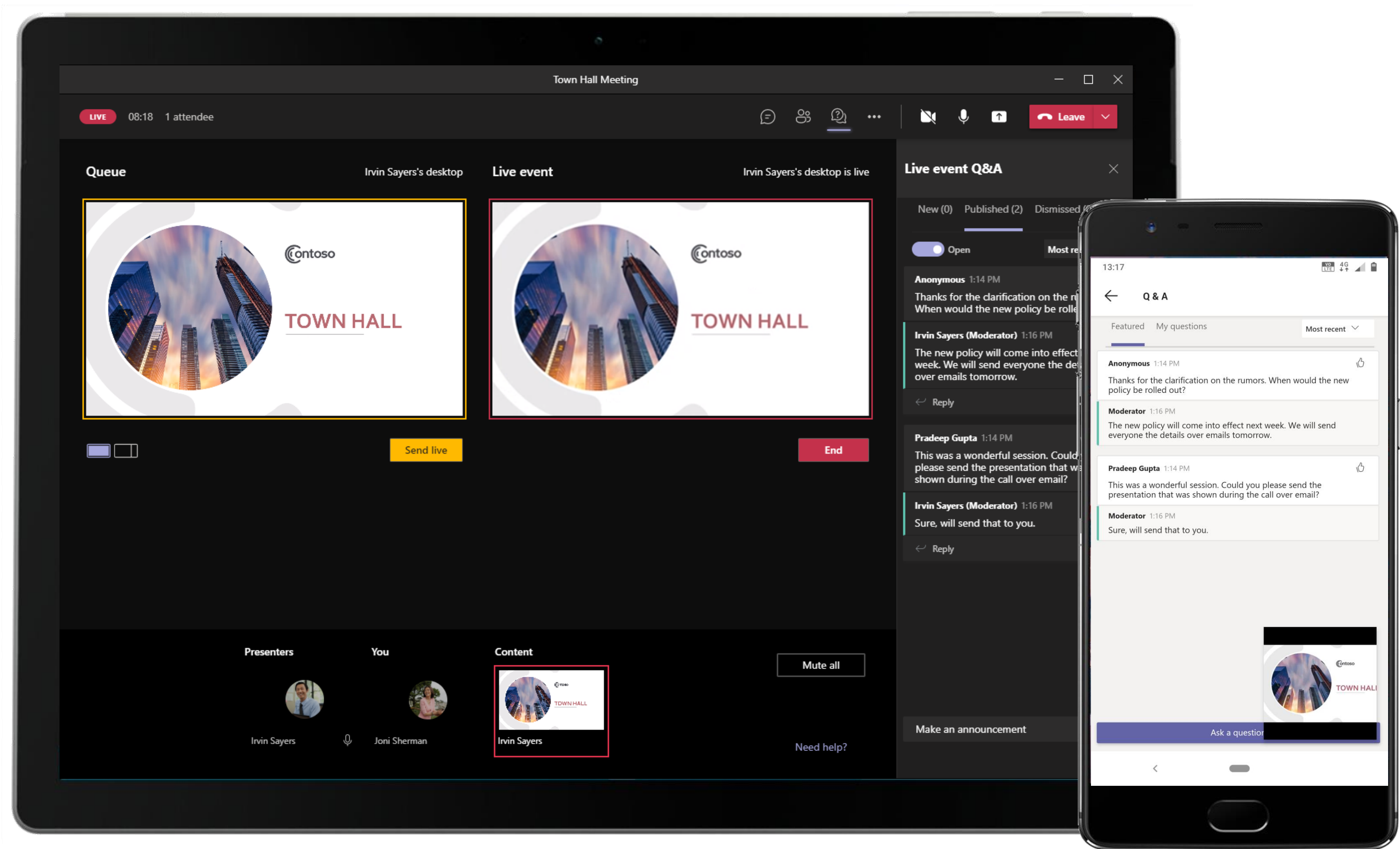
With Teams live events, you can broadcast video and meeting content to large online audiences. The host copies the link and sends it to attendees.



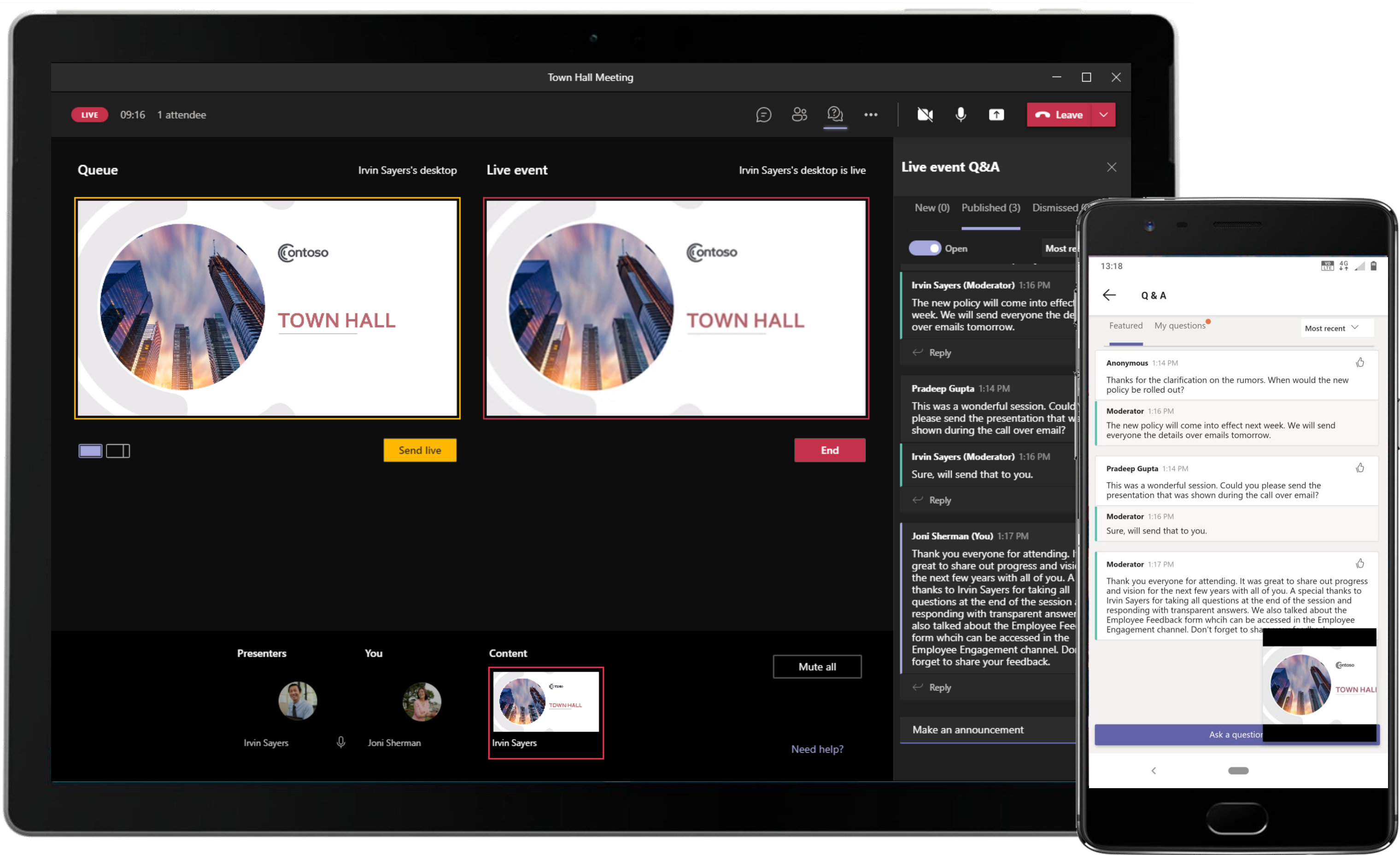
Event organizers can choose to share their screen, present documents, share videos, images and more for an engaging live event.



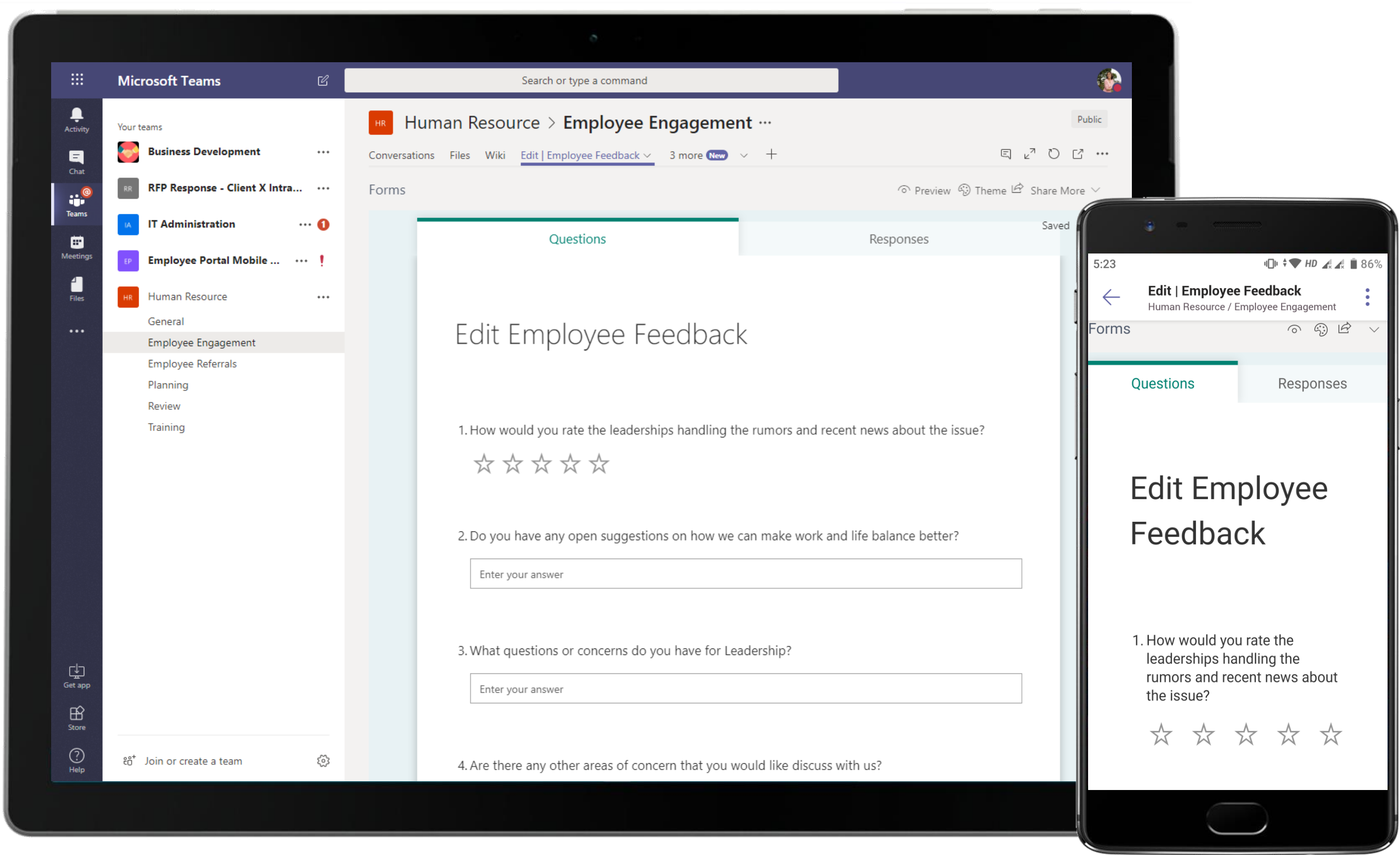
Producers of the live event can make Q&A sessions more productive by only publishing questions that are relevant to the event. Published audience questions can be viewed by all participants.



Event producers can respond to audience questions, make announcements and engage their meeting attendees without disturbing the presenter.



Live events in Teams empower multiple roles (organizer, producer, presenter, and attendee) to successfully broadcast a message in an event. The HR Manager requests the attendees to provide feedback.



Integrated Forms application within Microsoft Teams helps the HR team systematically gather employee feedback and suggestions after the town hall. The tab can also be used to analyze and report responses – all inside Teams.



Employee Engagement

HR Business Partner

Scenario Walkthrough

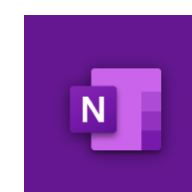
Contoso constantly looks for ways to keep their employee engagement healthy, given the often-stressful conditions their employees navigate. An HR associate identifies that the best way to do this is to have a highly communicative forum for employees to voice their thoughts. She wishes to measure if this kind of engagement ultimately leads to happier employees.

- Sets up an Employee Engagement channel to get ideas and suggestions from employees to make loyalty stores more fun
- Channel communication helps Contoso executives respond to employee suggestions directly and offer inputs on strengthening these suggestions, making them actionable
- Ideas that gain a lot of traction and discussion are documented in the pinned OneNote tab in the channel.
- Creates a poll using Polly for suggestions that appear consistently.
- Takes steps to immediately initiate a holiday cheer suggestion from employees using Freehand by InVision tab.

How did Teams help the HR Business Partner execute his roles and responsibilities?

- Enable organization-wide channel communication to get the best ideas forward.
- OneNote as a community notebook for the team with shared access.
- Gather employee feedback quickly and easily with Polly.
- Collaboratively expand upon ideas with Freehand by InVision.

Which app integrations on Teams made it possible?



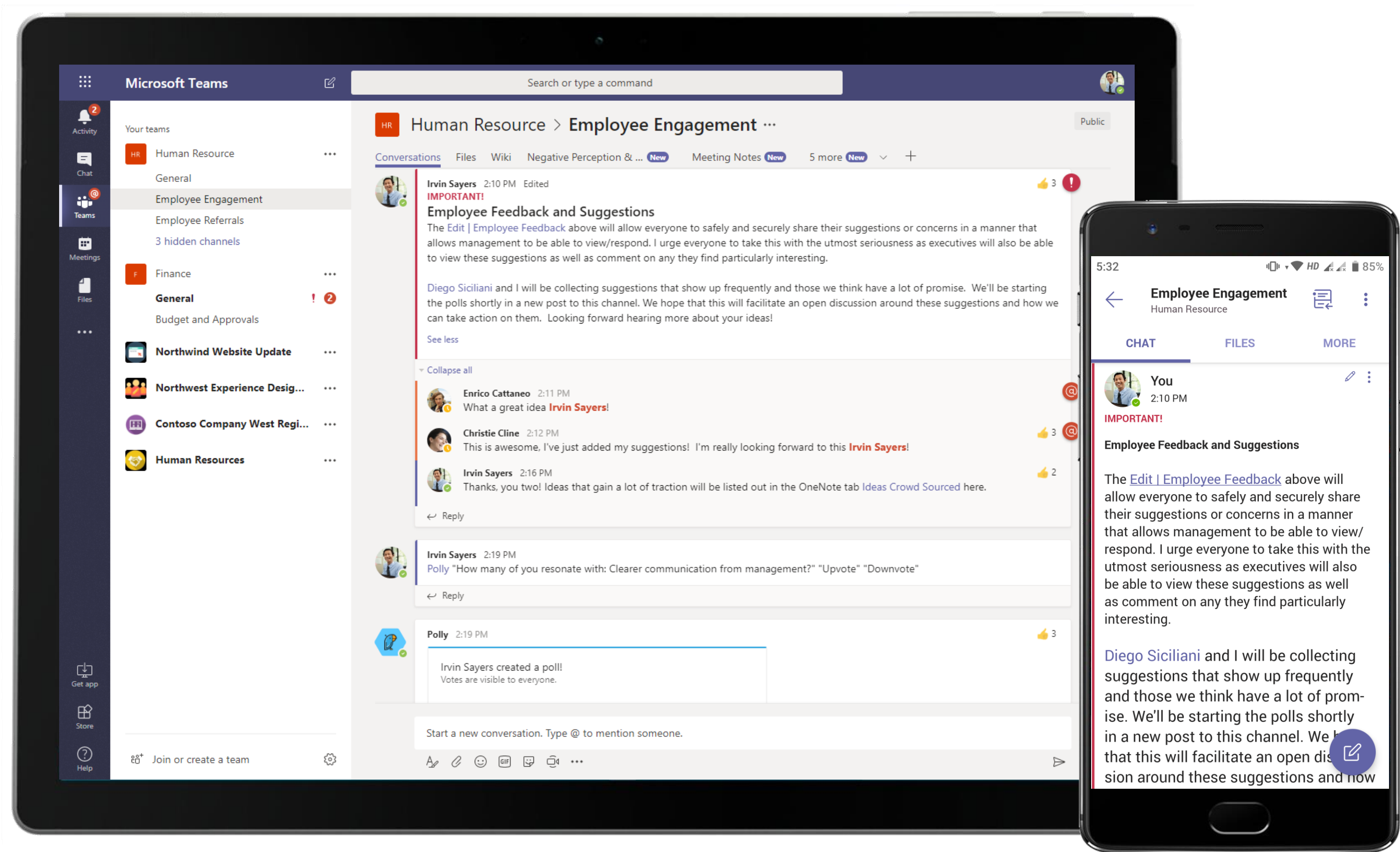
OneNote



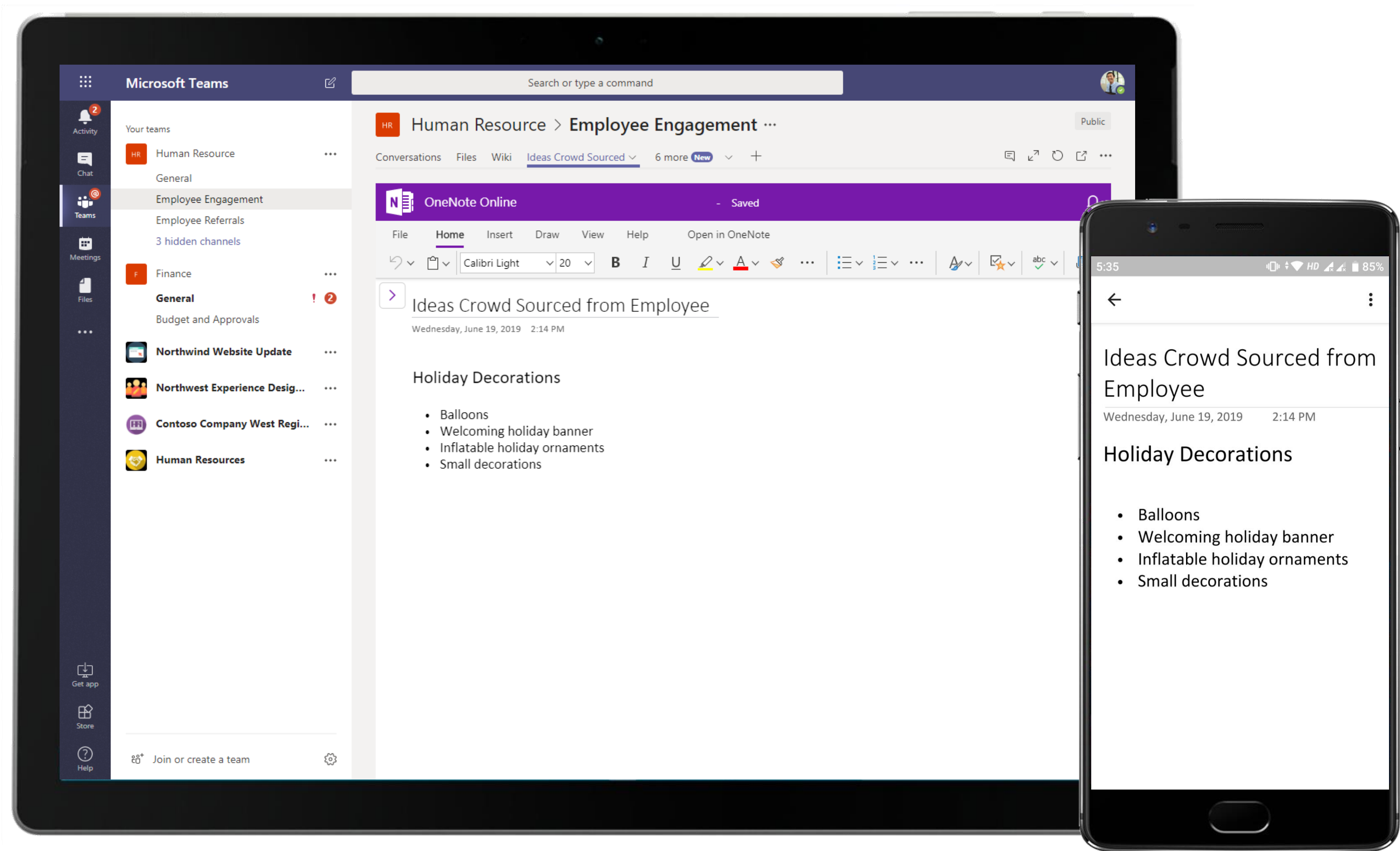
Freehand
by InVision



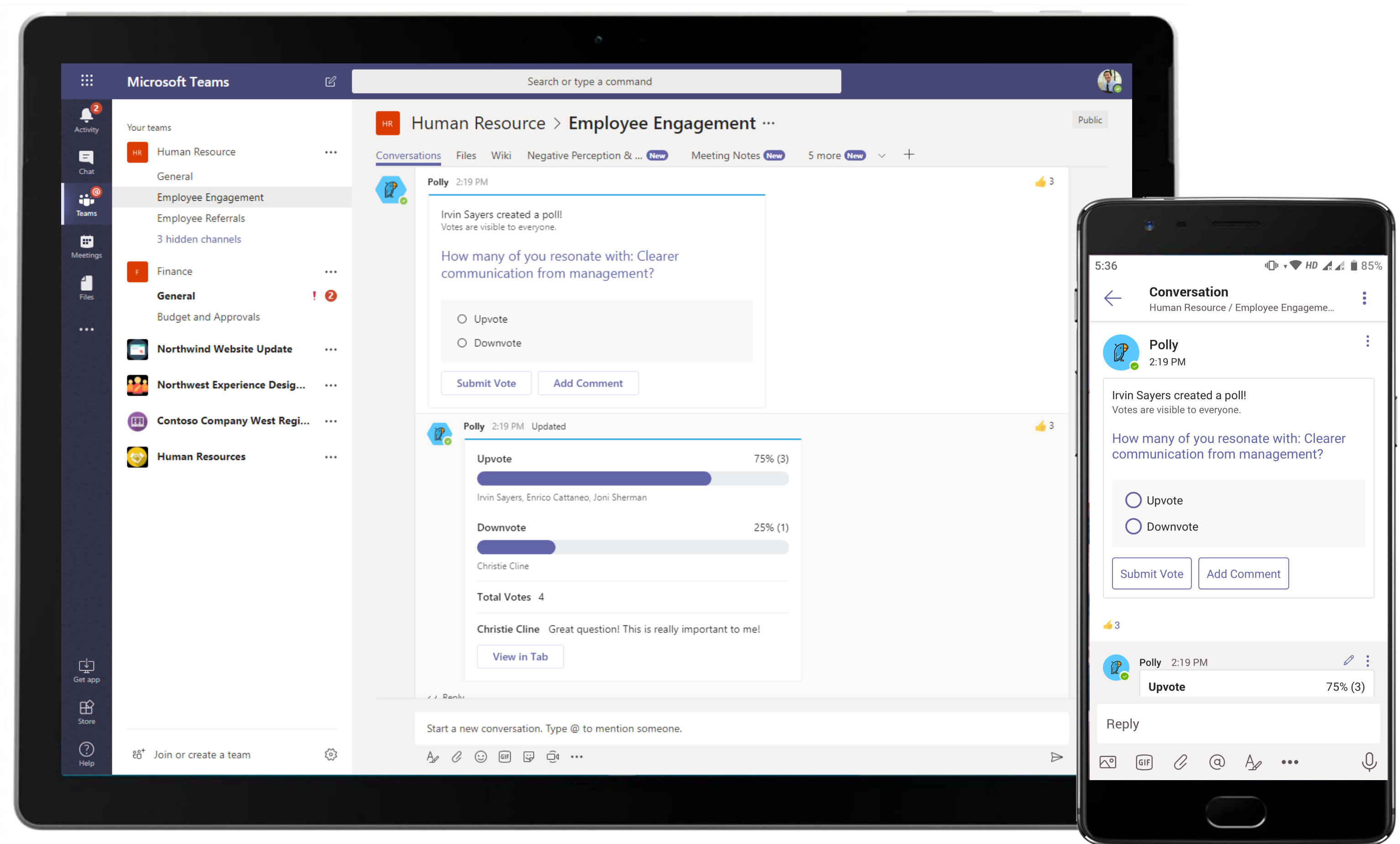
Polly



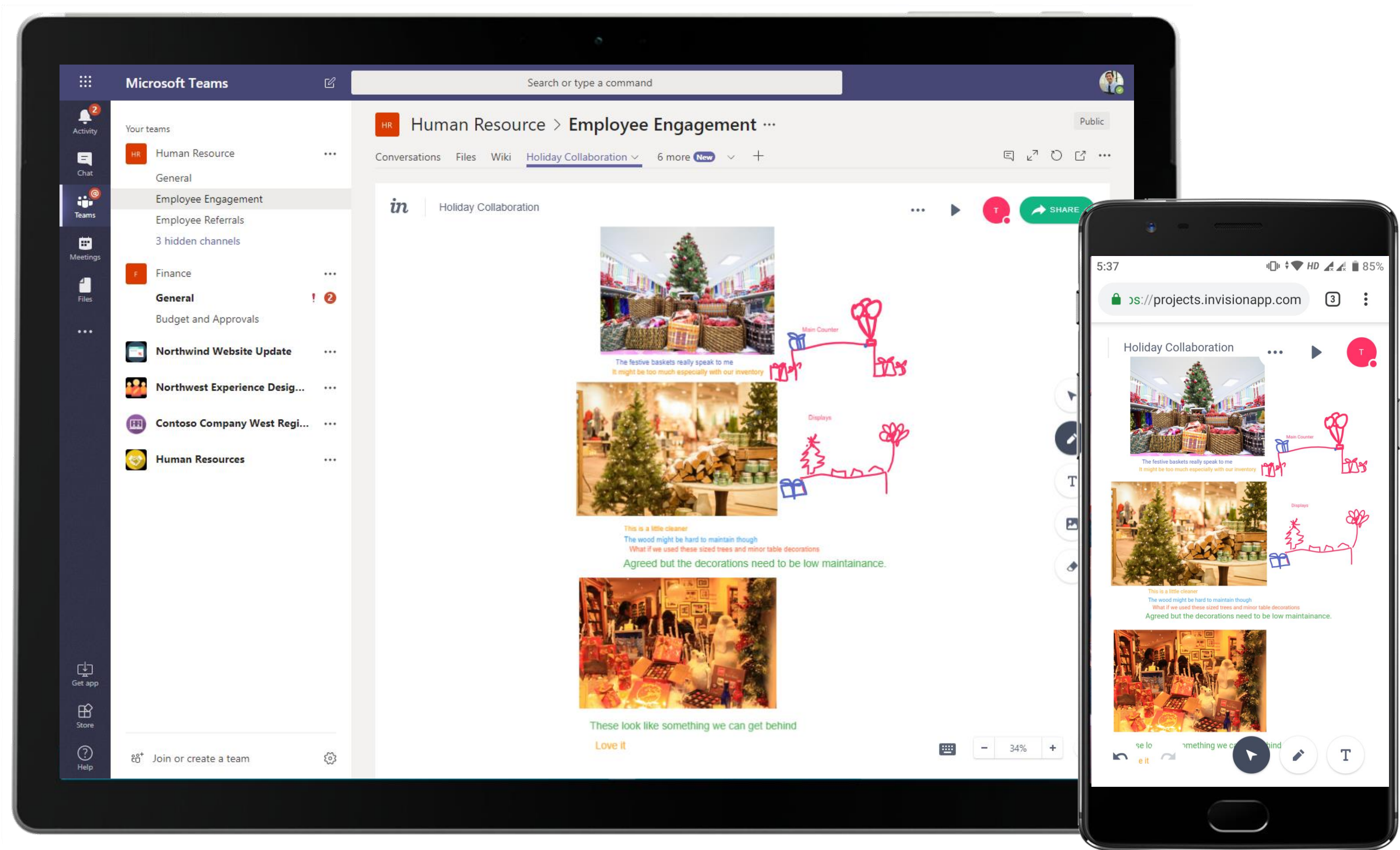
Channels can be created to serve any purpose. They can be created to increase communication and productivity among team members and in this case, the HR Business Partner aims to increase employee engagement through channel conversations.



Ideas that gain a lot of traction and discussion are documented in the pinned OneNote tab in the channel for the HR Business Partner’s quick reference. Employees can also reference the list of the ideas shared so far to avoid duplication.



A Microsoft Teams polling solution allows upvote/downvote on ideas put forward by employees. Intuitive polls designed to help you do your best work are powered by Polly – one such app available on the public app store right inside Teams.



Collaborate, ideate and draft solutions on an infinite white boarding space with Freehand by InVision in Teams. Employees design think via rich, visual, collaborative brainstorming now possible without the need of physical whiteboards or papers.



New Employee Training

Hiring and Training Manager

Scenario Walkthrough

Training new employees can be a time-consuming task when there are so many aspects to the work that employees typically only learn when they are on the job. The HR Training Manager envisions and works toward keeping all the new employee training material available in the Teams platform for easy access and reference while on the job.

- Sends a welcome to the new hires who are notified by chat via Hibob.
- Introduces two new recruits to the training material located in an exclusive channel for new employees.
- Encourages them to download the Teams app on their phone to access training material from anywhere.
- Takes them through the essentials shared in the channel and suggests a conversation tab where employees can ask questions and start discussions.
- Helps them complete an eight-hour training program over Teams to get them ramped up.

How did Teams help the Hiring and Training Manager execute his roles and responsibilities?

- Stay up-to-date on company events, manage attendance and get to know co-workers with Hibob.
- Keep documentation accessible for team members in a secure Files tab.
- Host a wealth of information using Office 365 tools such as Word and Excel.
- View content that's broadcasted company-wide with Dynamic Signal.

Which app integrations on Teams made it possible?



Word



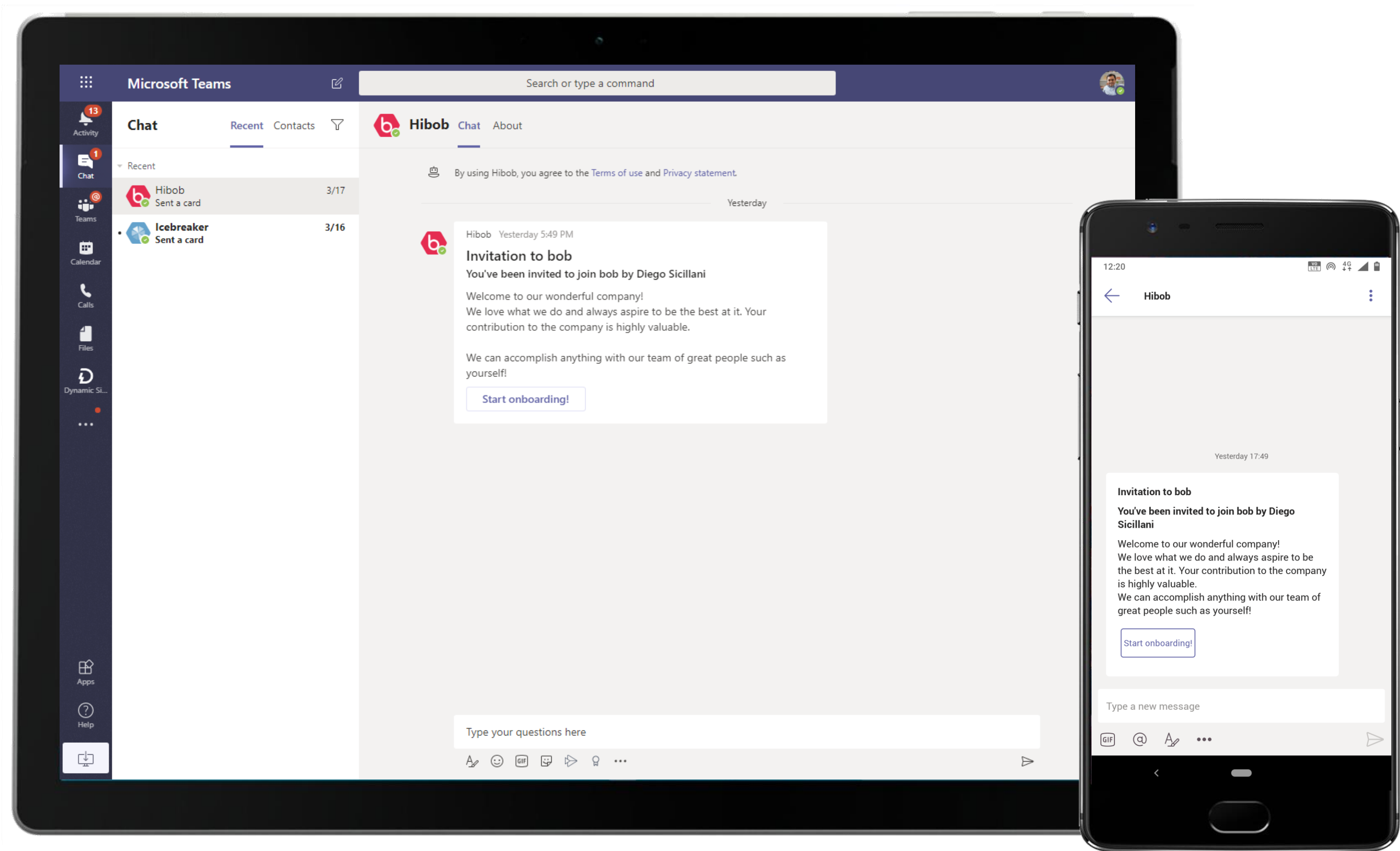
Excel



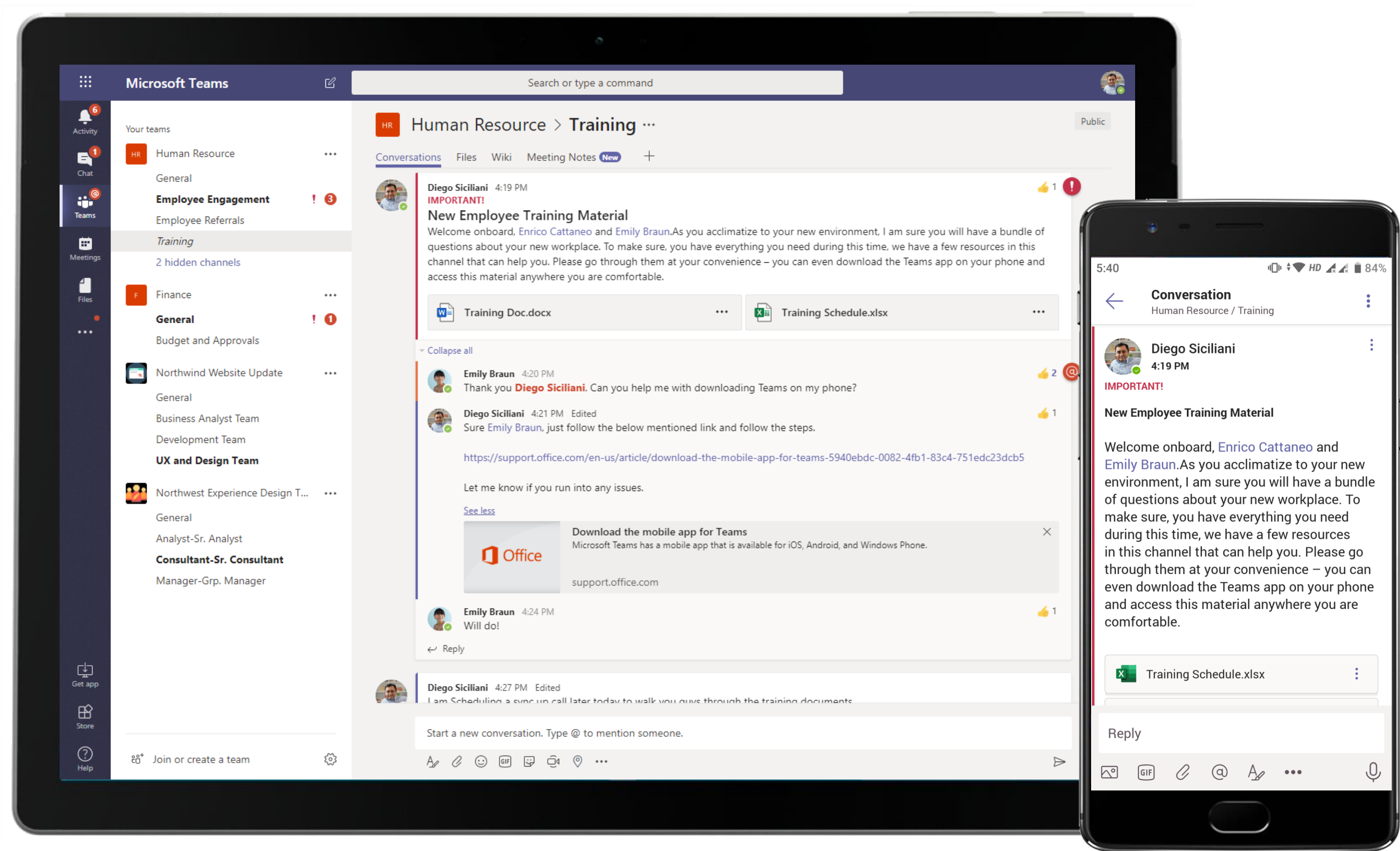
Hibob



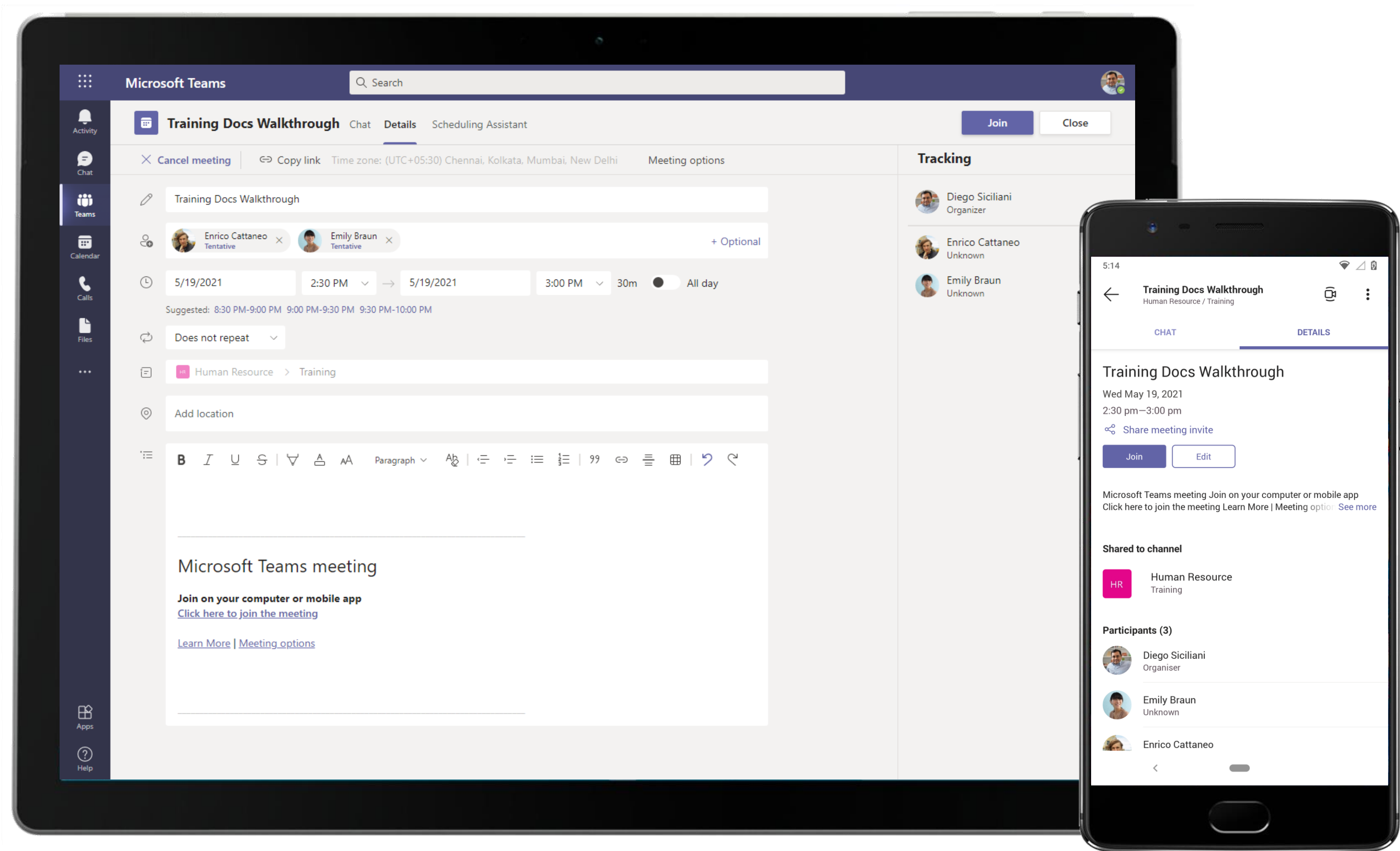
Dynamic
Signal



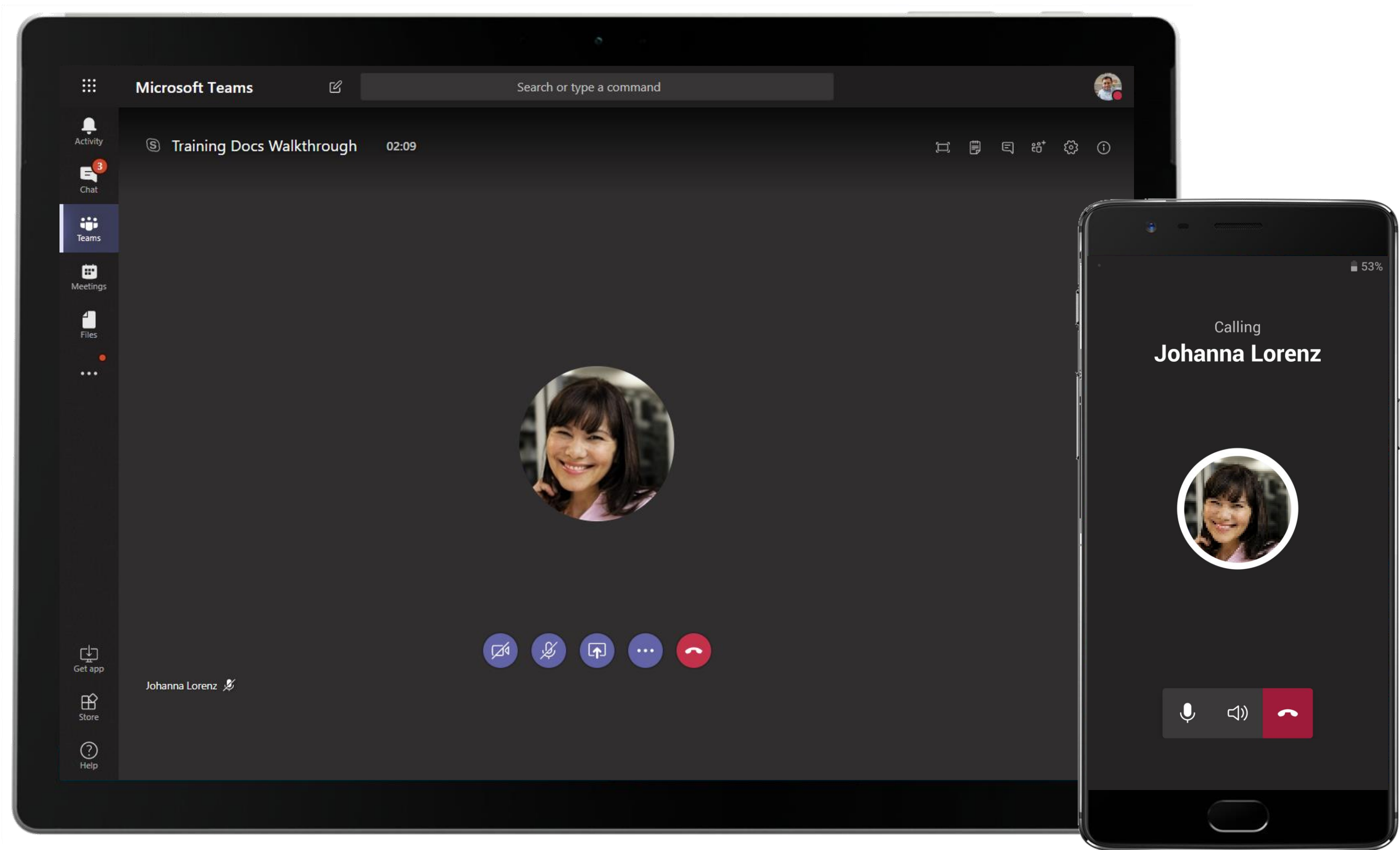
Use Hibob and personalize onboarding to fuel a sense of belonging from day one. The new employee gets an invitation for onboarding through Hibob.



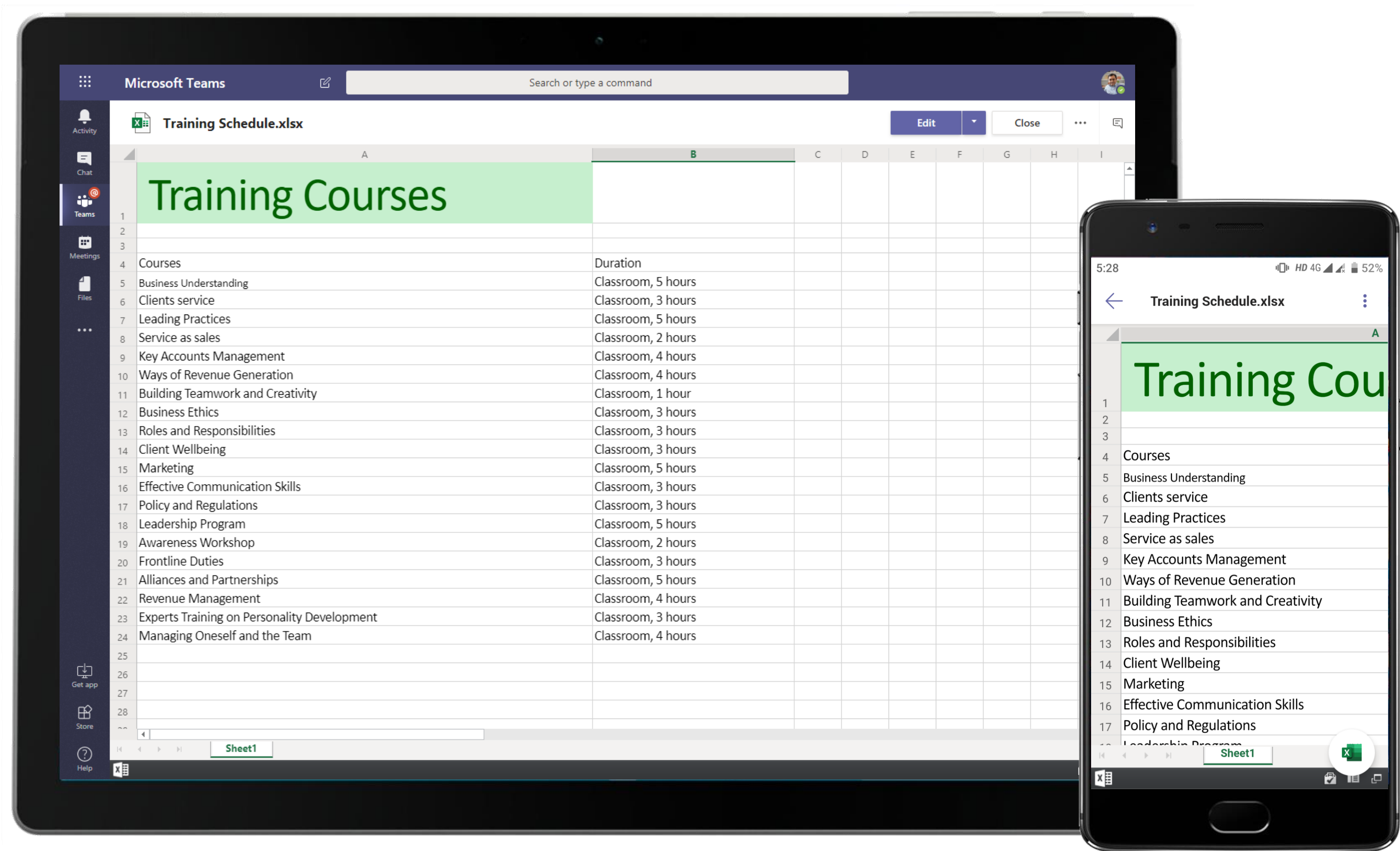
Dedicated teams and channels enable instant group collaboration. The Hiring and Training Manager uses a dedicated training channel to induct new employees and furnish them with training documents and schedules.



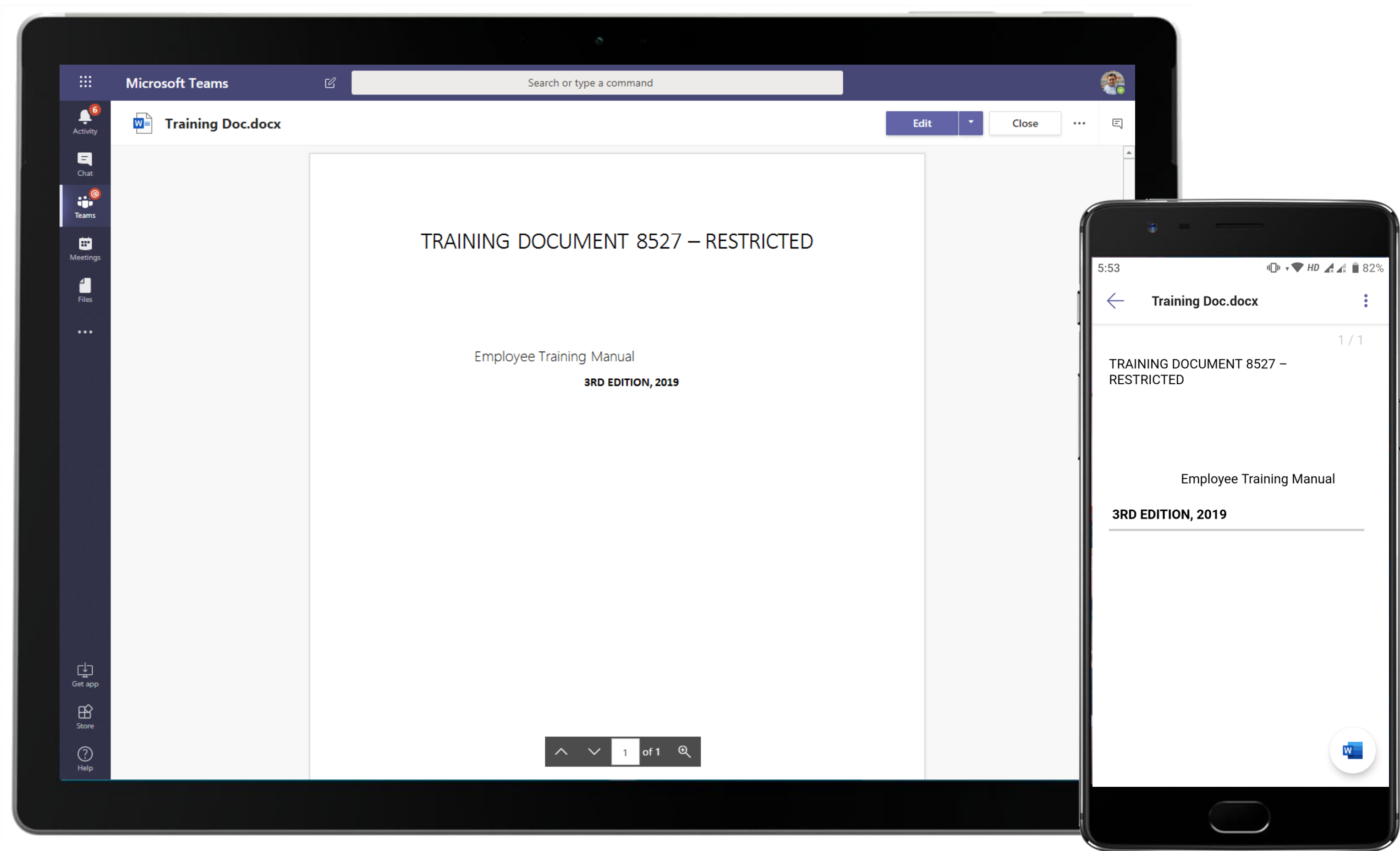
Meetings are not meant for discussions alone in Teams! Train team members virtually anywhere, anytime and schedule meets with ease through the native scheduling calendar. Meeting threads in channels allow conversations before and after the meeting.



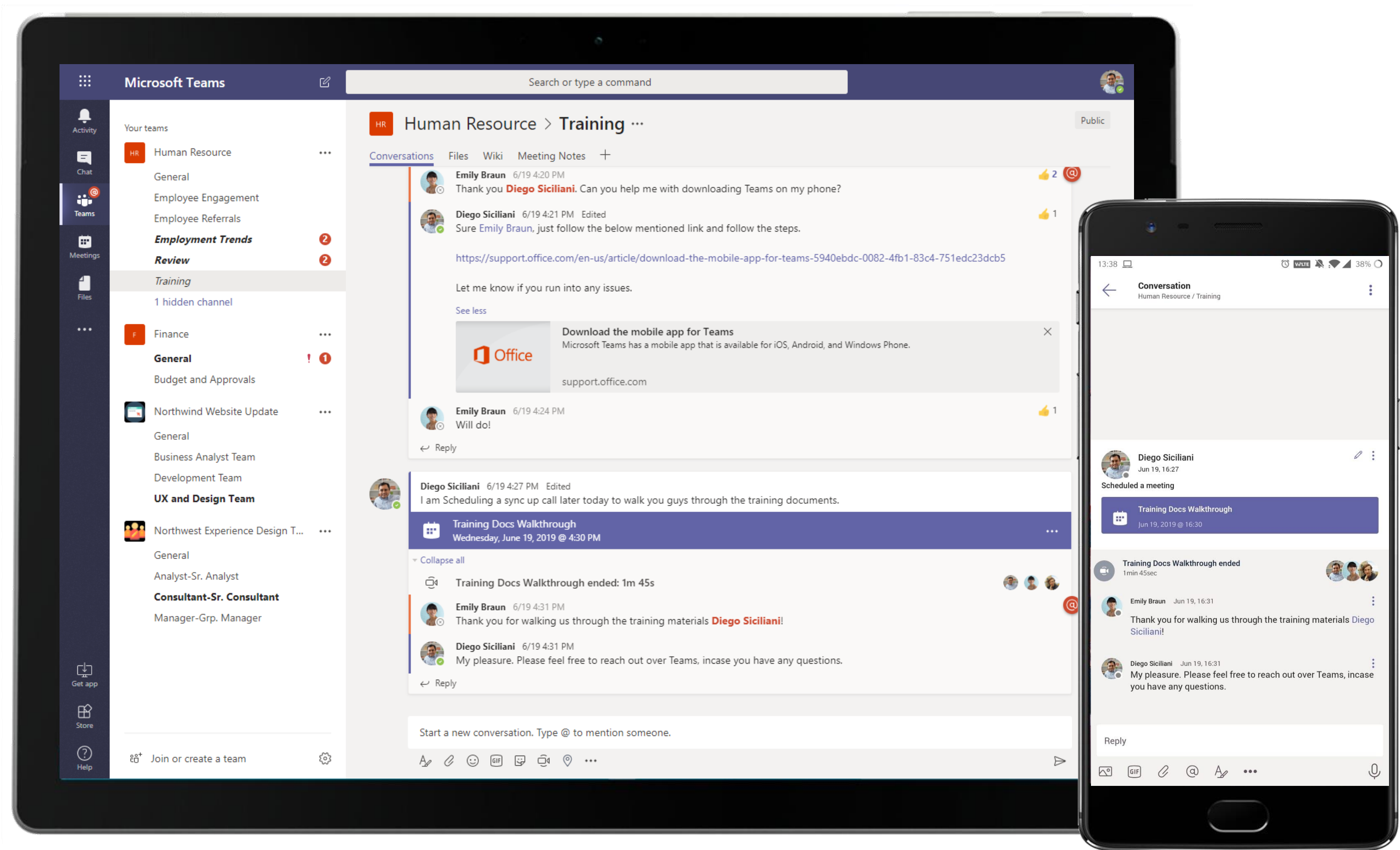
During a meeting, participants can use rich meeting capabilities such as video, screen sharing, file sharing, meeting notes and chat to make the meeting engaging and productive. Needless to say, meetings are fully supported on mobile clients too!



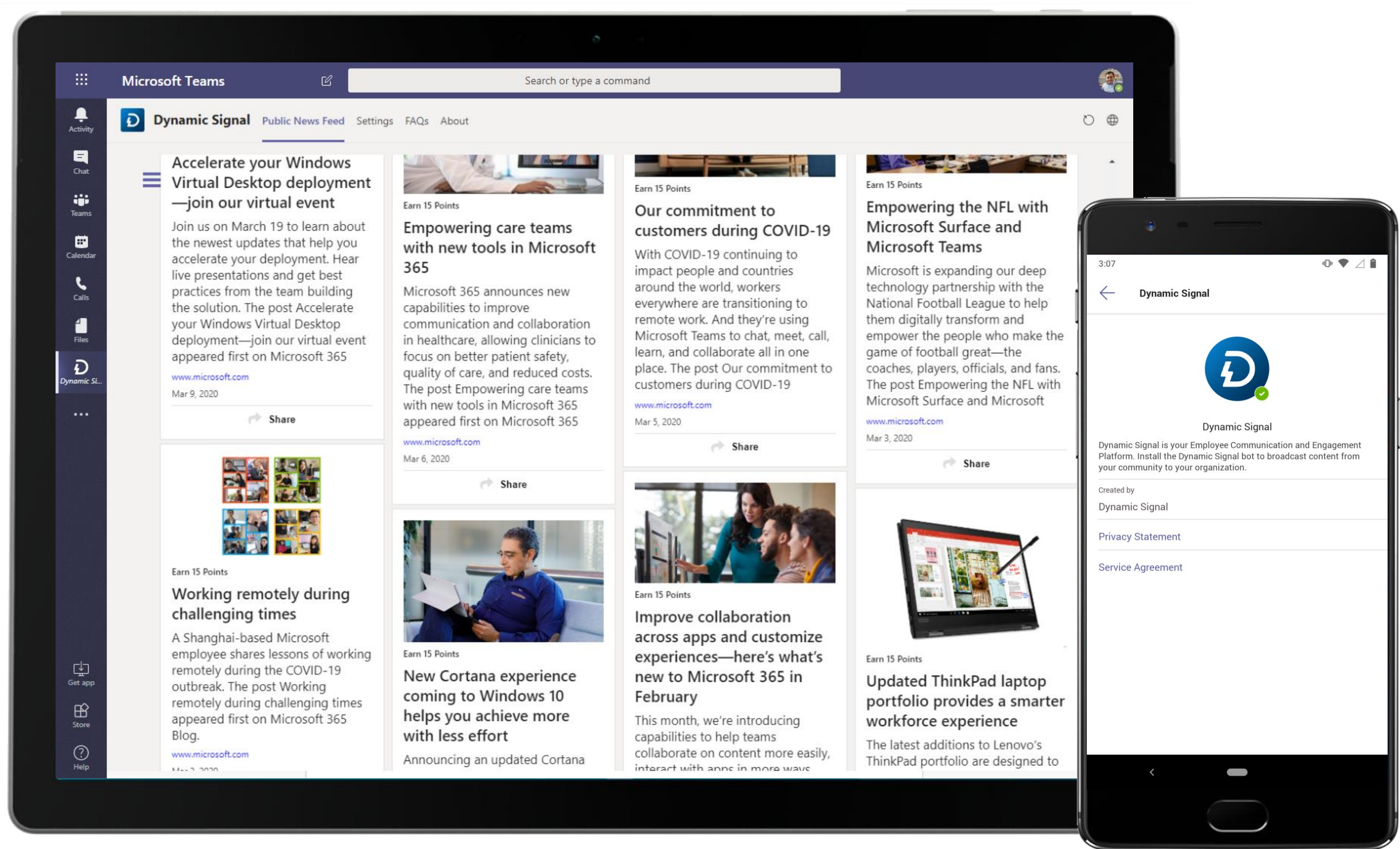
Screen sharing lets you present your screen during a meeting. You can choose to present your entire desktop, a specific application or a file. Here, the Training Manager presents an Excel spreadsheet to the new hires.



Screen sharing lets you present your screen during a meeting. You can choose to present your entire desktop, a specific application or a file. Here, the Training Manager presents a Word document to the new hires.



Meetings are not meant for discussions alone in Teams! Train team members virtually anywhere, anytime and schedule meets with ease through the native scheduling calendar. Meeting threads in channels allow conversations before and after the meeting.



Dynamic Signal provides a news feed of content that lives inside of Microsoft Teams. The broadcaster can even track who is reading what content to measure the communication reach.



Talent Acquisition

Hiring and Training Manager

Scenario Walkthrough

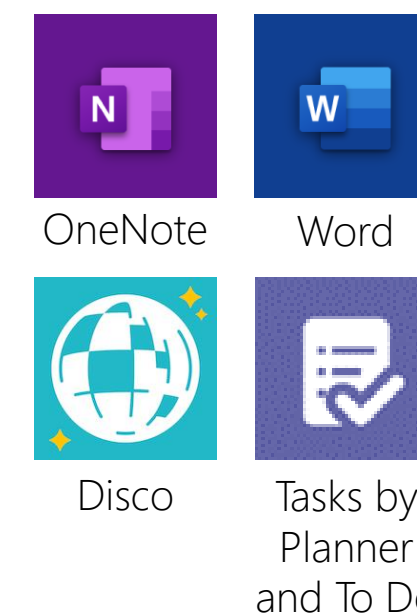
Contoso intends to hire interns who will transition into full-time employees but first needs to ensure that they are hiring the right people. The Hiring Manager uses Teams to expedite and automate the lengthy hiring and HR process.

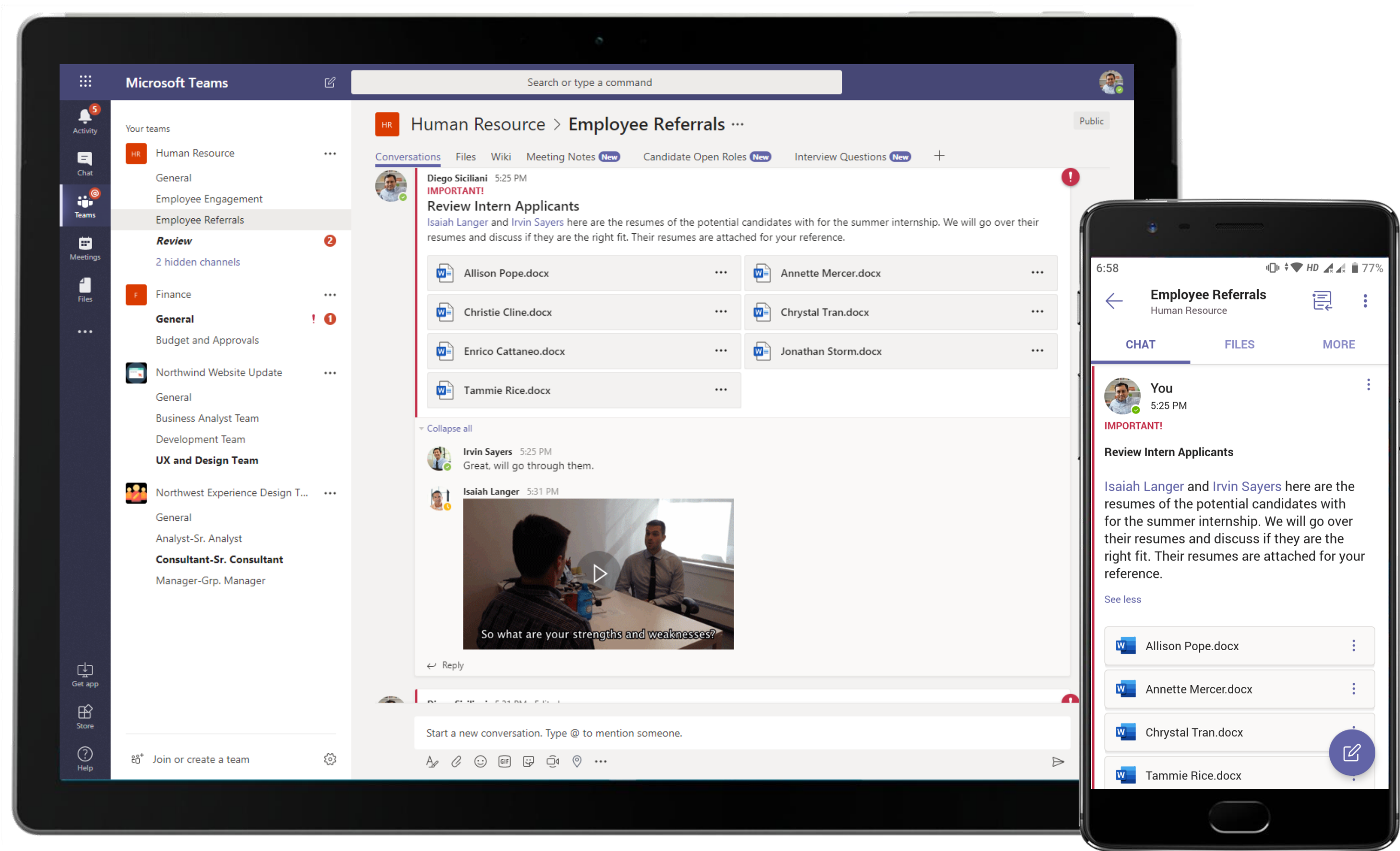
- Receives a large volume of employee referrals.
- Creates an exclusive team and channels to shortlist resumes and candidates for different job functions.
- Opens channel Tasks by Planner and To Do tab and assigns potential candidates to the open roles.
- Uses screen share in a channel meeting with HR associates to present candidate resumes housed within the Files tab.
- Shortlists candidates for the interview and uploads a document with interview questions for candidates.
- Posts a kudos statement through Disco in the employee recognition channel.

How did Teams help the Hiring and Training Manager execute his roles and responsibilities?

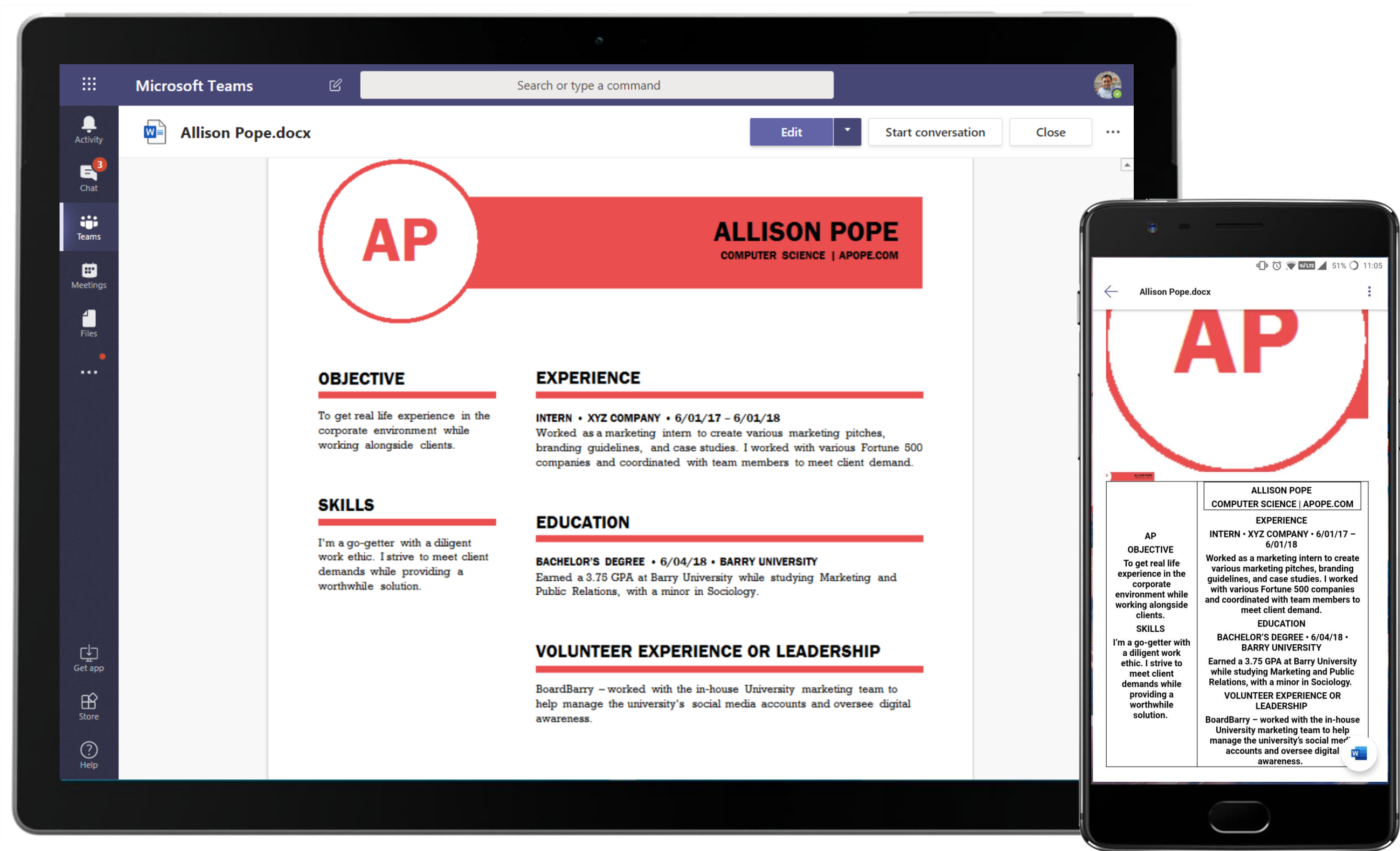
- Integrated Office applications like Tasks by Planner and To Do and Word to execute tasks within Teams.
- Hold secure calls and conferences and share screens with enterprise security.
- OneNote as a community notebook with shared access for greater collaboration.
- Build stronger cultures, celebrate employee achievements with Disco.

Which app integrations on Teams made it possible?

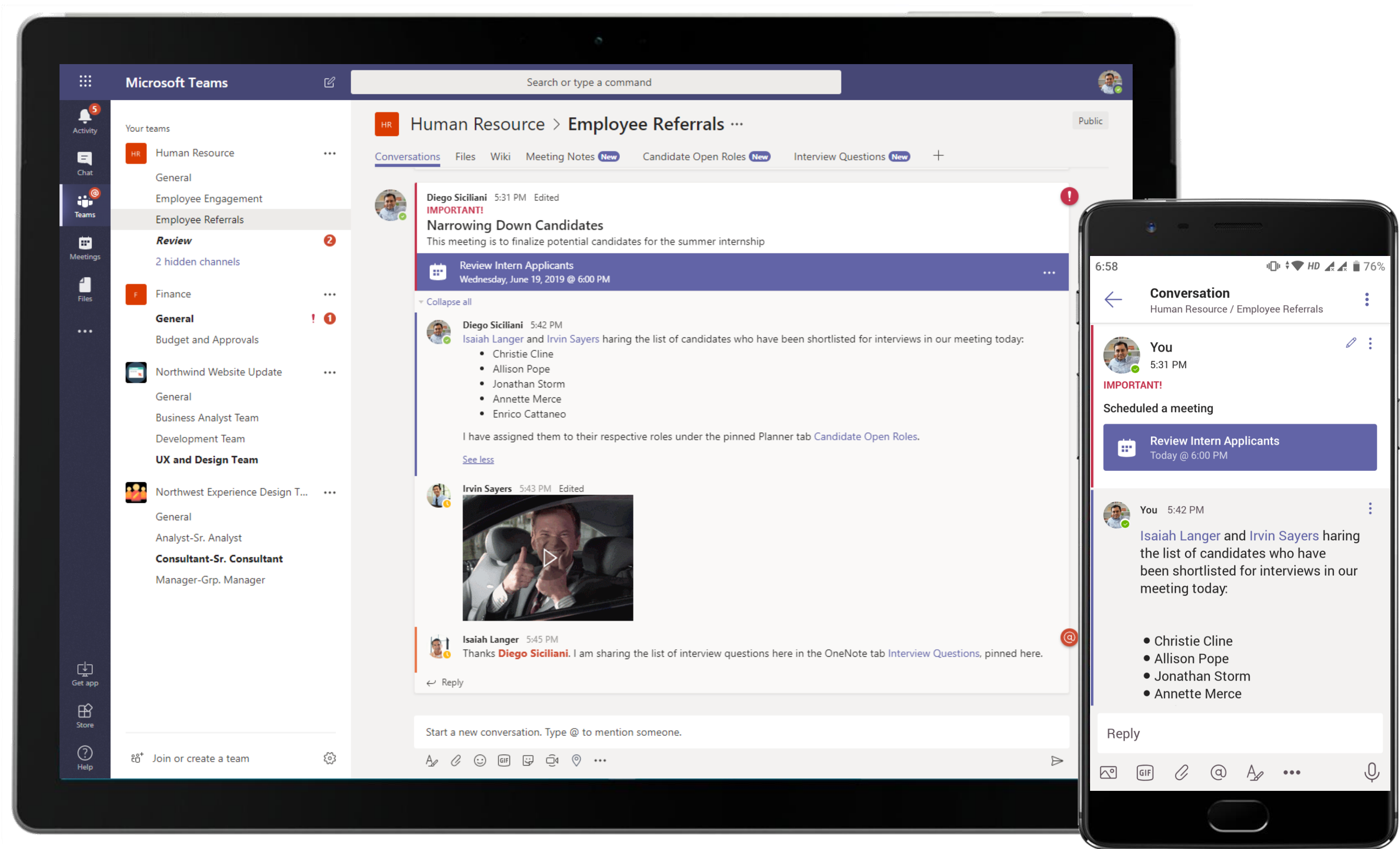




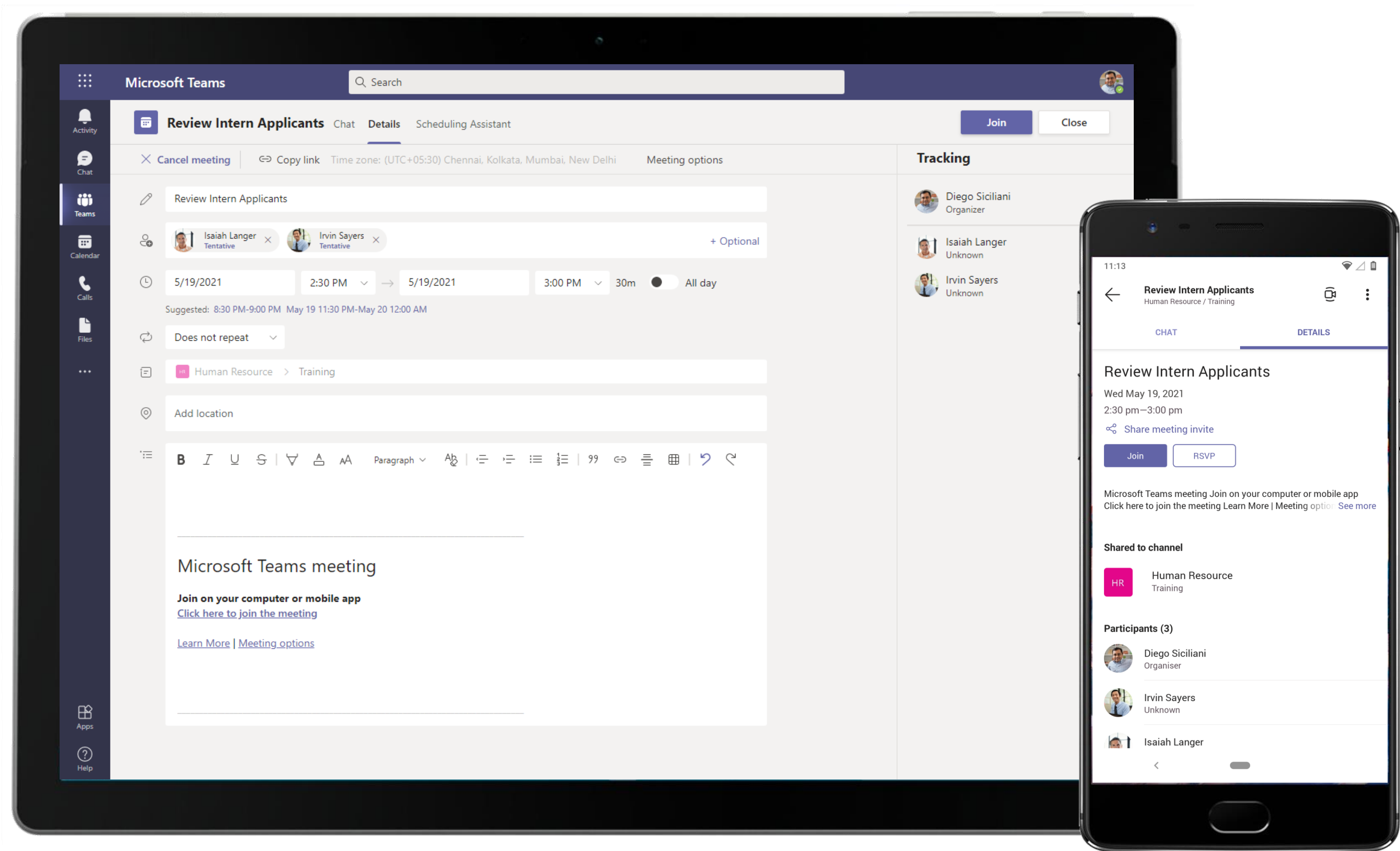
The Hiring Manager uses an exclusive channel to shortlist resumes and candidates for different job functions. The @mention feature allows him to tag relevant personnel to help him with the task at hand.



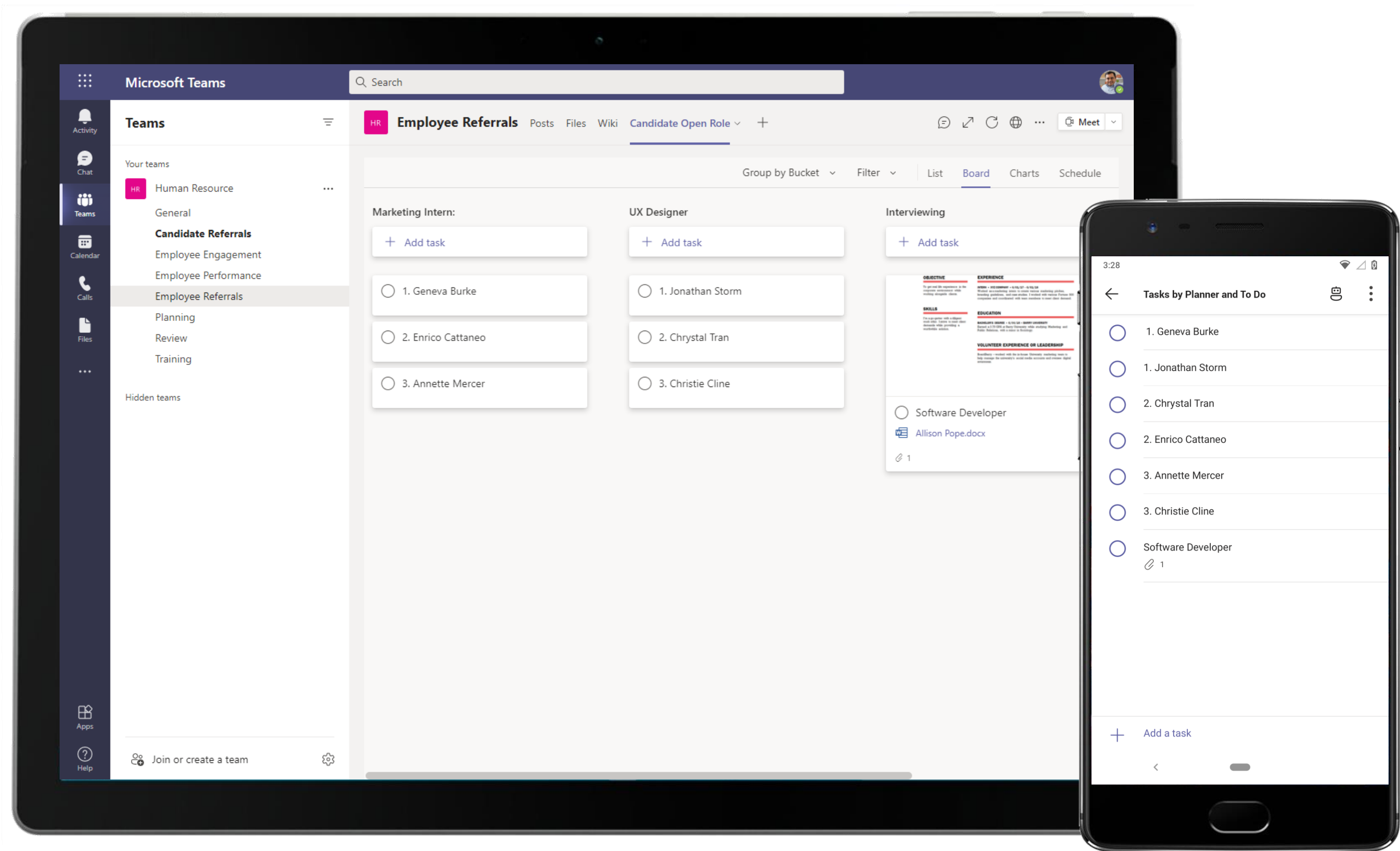
Enjoy powerful document creation and editing with Word. Store team documents easily and securely.



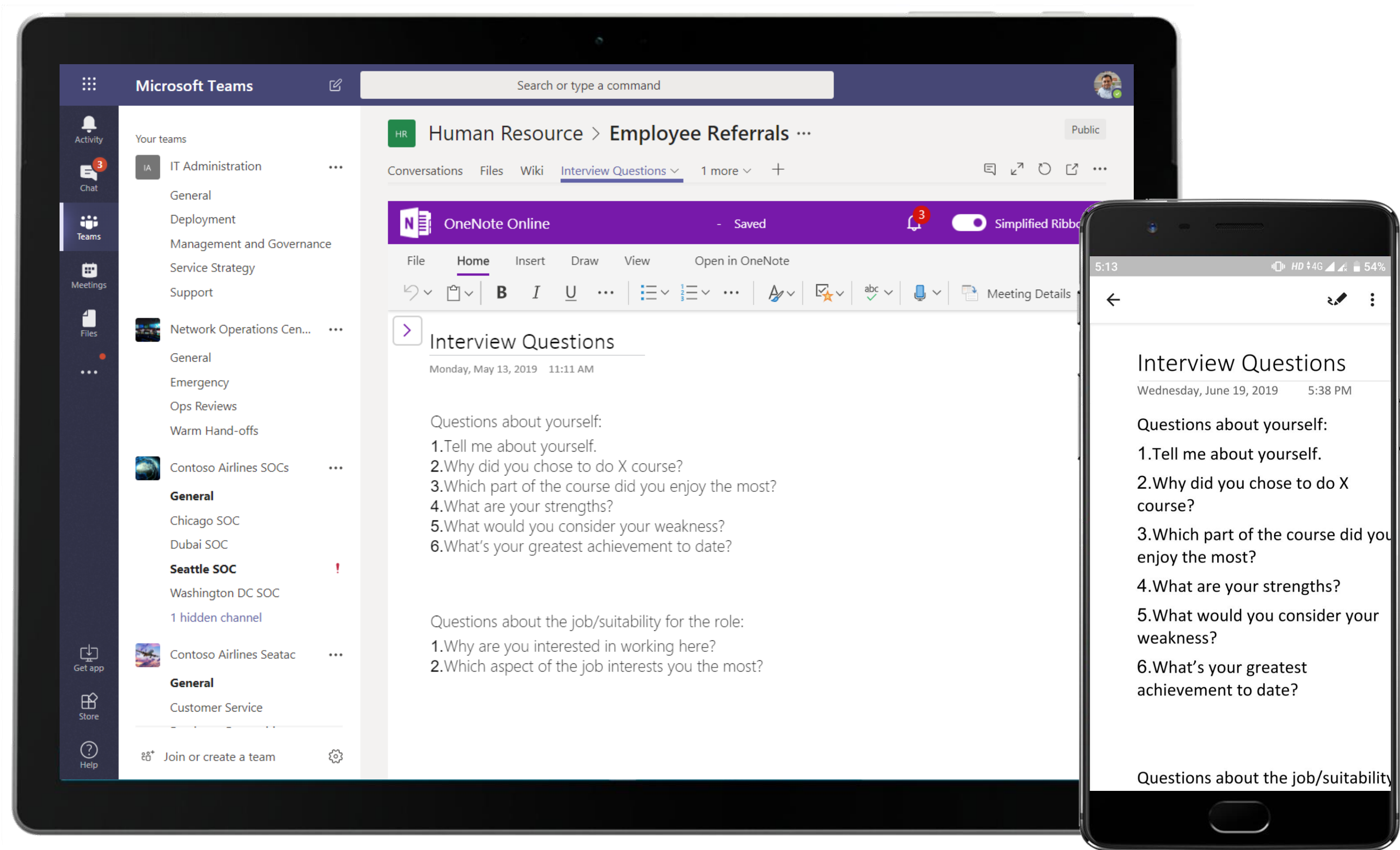
Microsoft Teams conversations are threaded so users can reply directly in-context to specific conversations, while keeping relevant discussions and files grouped together. The recruitment team discusses candidates shortlisted directly in the channel.



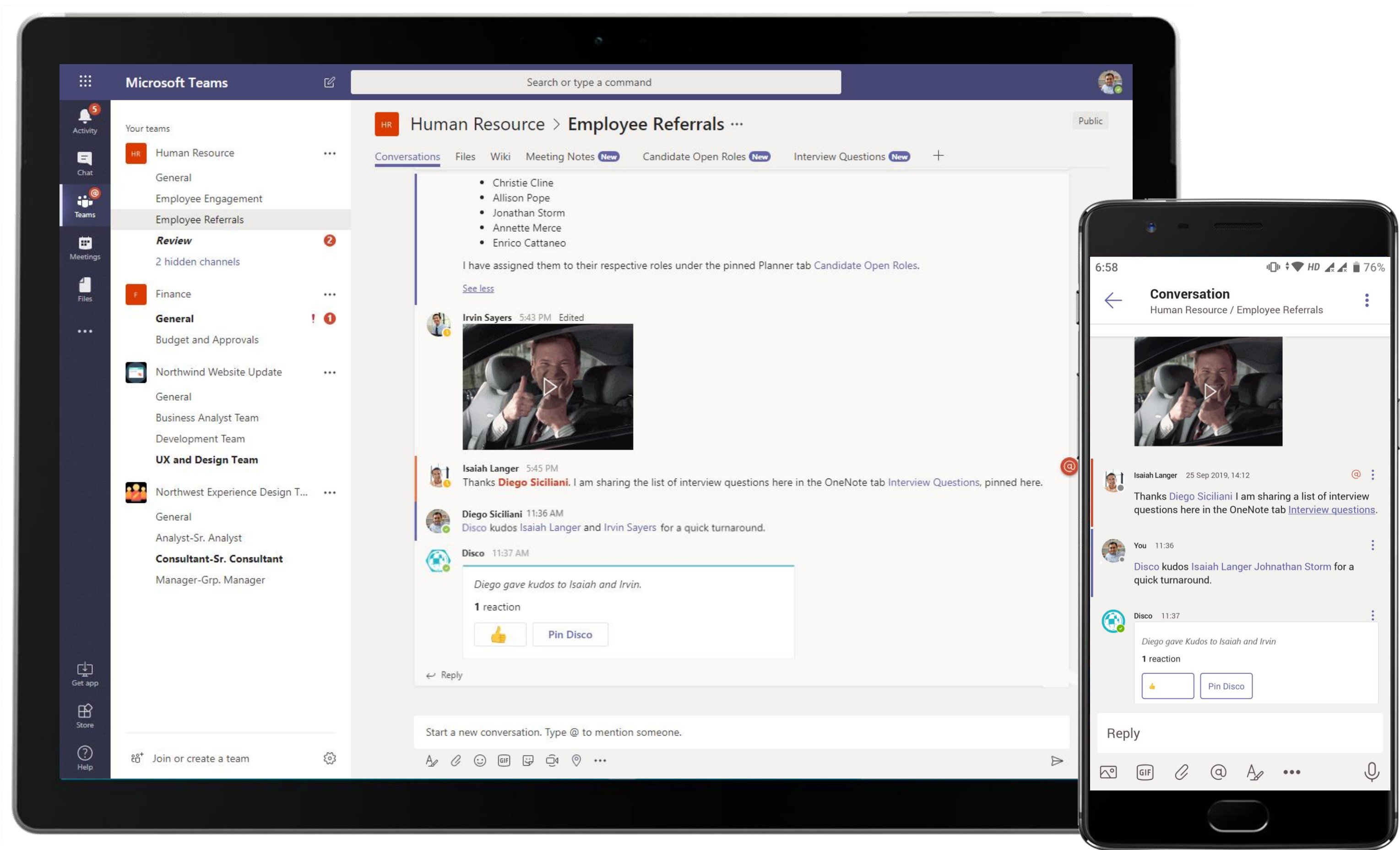
When the Manager looks to create a meeting invite for discussing the profiles of the shortlisted candidate, he can use the native scheduling calendar to check for optimal meeting time for all attendees.



The Tasks by Planner and To Do tab helps him break down his tasks efficiently and assign stakeholders for each task, without having to leave the Teams app. In this case, he tracks the interview process and pipeline effectively using Tasks by Planner and To Do – lightweight!



Collaborate, ideate and draft solutions with team members in real-time by using an array of applications hosted in the Teams store. The OneNote app allows quick and easy reference to interview question bank right in the channel.



Recognize and appreciate employees and coworkers with Disco. Deliver in a chat, or for wider recognition, send it in a channel conversation. The new joinee gets confidence boost as he receives accolades from the HR Manager.



Review of Hiring Process by HR Leadership

Director

Scenario Walkthrough

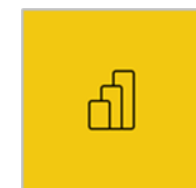
Contoso is an equal opportunity employer committed to creating a diverse workspace. The HR Leadership achieves this by routinely examining their hiring process. The leadership team spearheads the task by collaborating with HR associates.

- Posts message in HR hiring channel requesting an analysis on hiring trends, diversity efforts and attrition data.
- Responds to queries and replies from HR Associates on her post.
- HR associates present their data using a Power BI dashboard.
- Consumes the insights from the dashboard using Power BI through slices, filters, etc. right inside Teams.
- Appreciates teams' efforts and presentation at short notice.

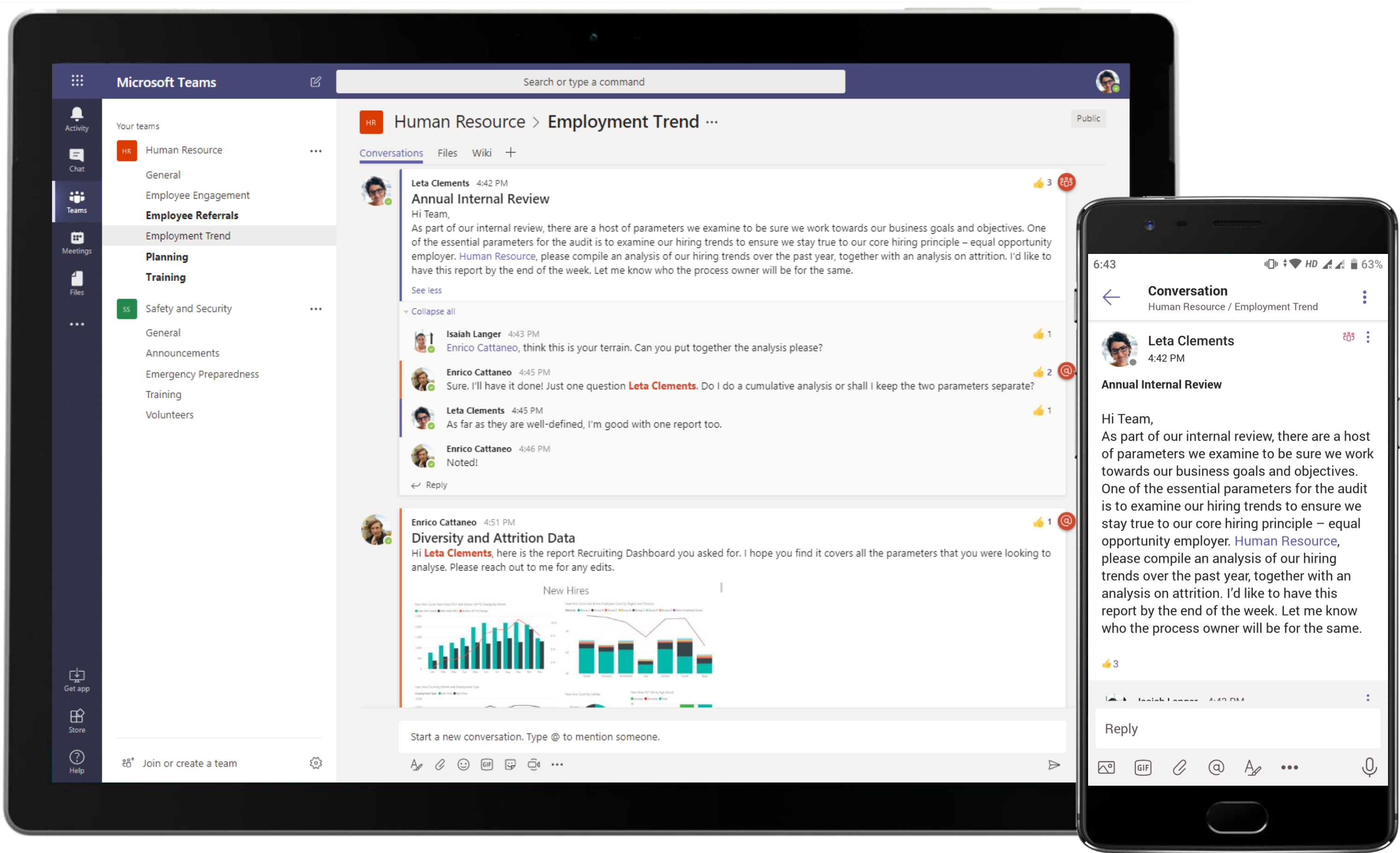
How did Teams help the Director execute her roles and responsibilities?

- Reach entire team by creating conversation threads in channels.
- Keep track of responses with alerts in the activity feed thanks to @mentions and reply notifications.
- Utilize Power BI to compile and review data in a highly visual format.

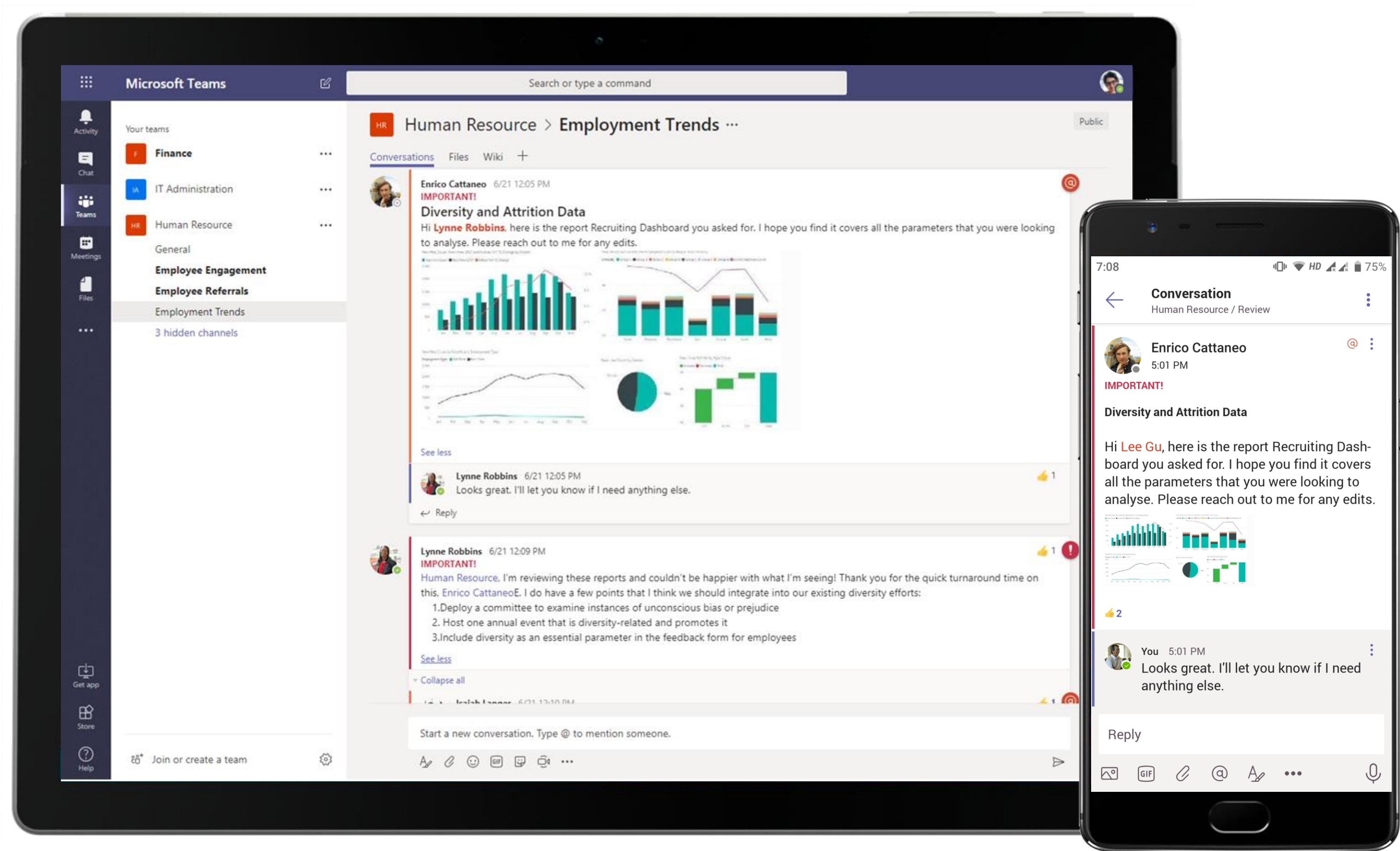
Which app integrations on Teams made it possible?



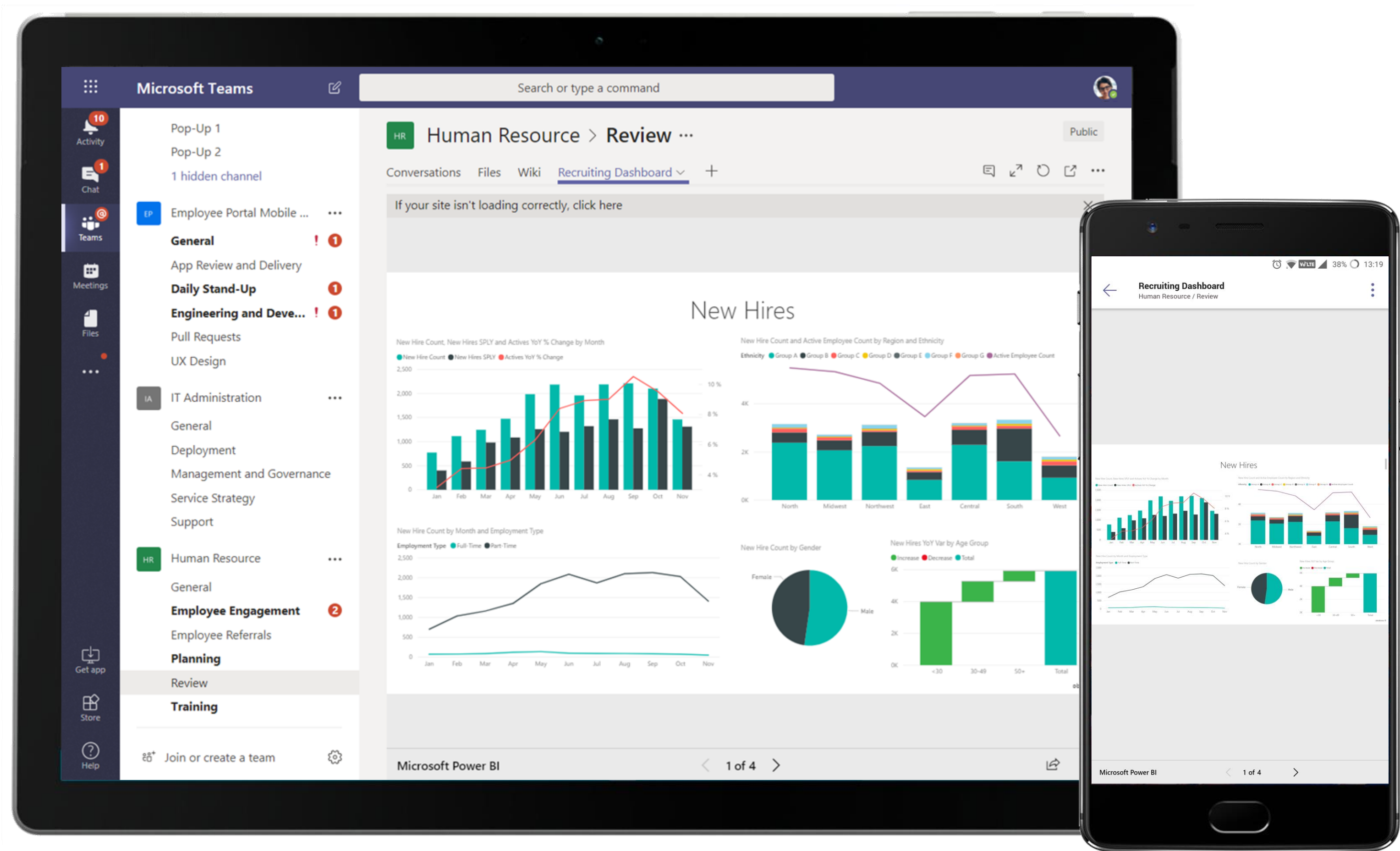
Power BI



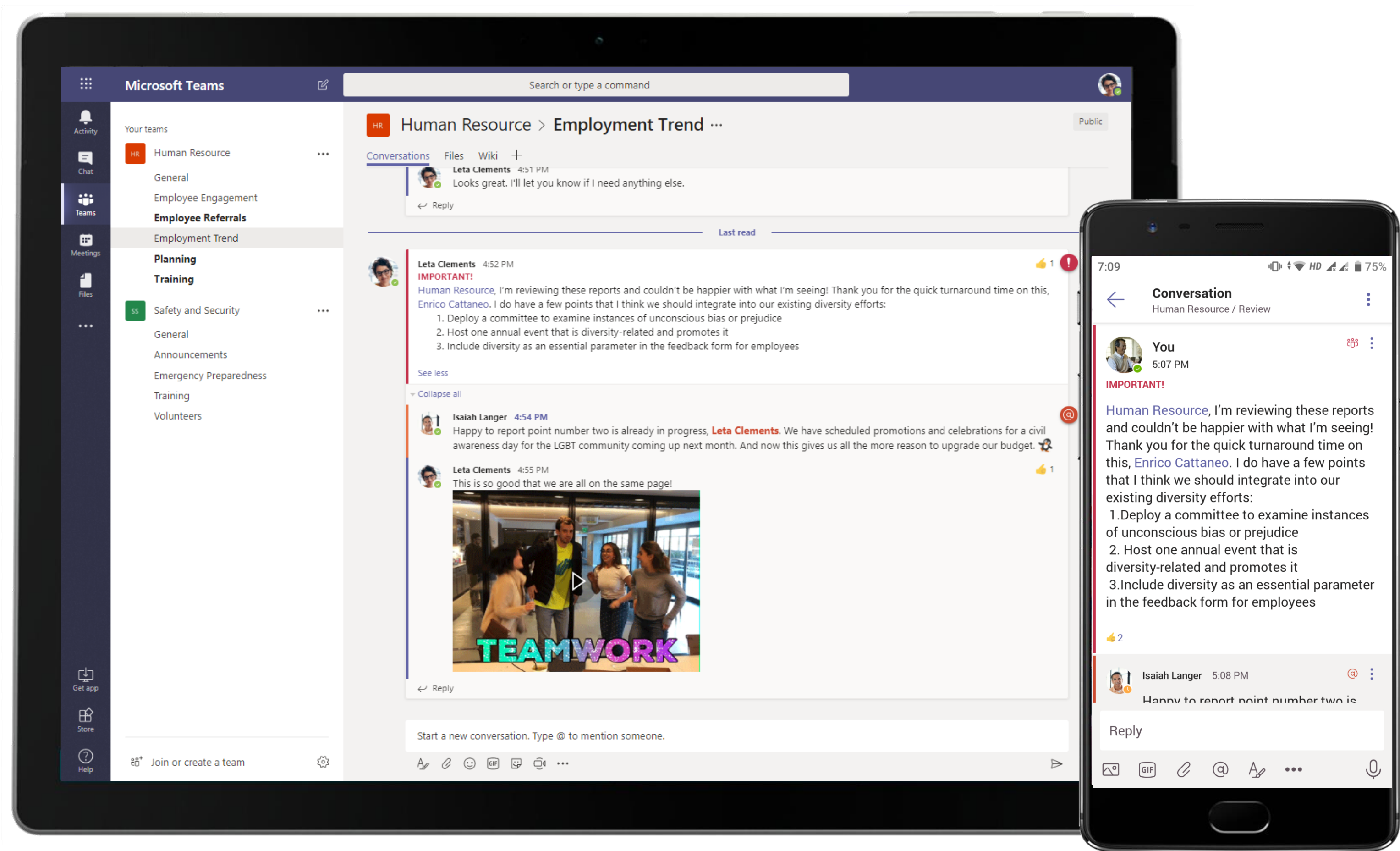
@mention in channels and chats allow users to tag individuals, channels or entire team to ensure relevant people are looped in. The Director posts a message in the channel and @mentions the team to get everyone’s attention.



A Power BI dashboard offers a visually rich view of current and projected data. The HR Associate uses Power BI to present a rich, engaging and in-depth analysis on hiring trends, diversity efforts and attrition data to paint a narrative.



Facilitate data-driven decisions informed by visualizations and actionable insights using Power BI for Microsoft Teams. The Director is able to see trends over time, catch outliers and identify the next steps with her team.



The Director is easily able to appreciate her team members for sharing this data at short notice. She uses the conversation thread around the Power BI tab in the Review channel to lay down action items for everyone.



Onboarding Challenges Made Easy

Analyst

Scenario Walkthrough

Contoso looks to develop a new, inclusive digital workplace culture that millennials have come to expect. Contoso leverages Microsoft Teams to help facilitate this cultural shift. An Analyst, a recently hired new collegiate employee, gets acquainted with his new corporate environment, including Contoso's company policies, systems, and culture. He comes across his fair share of issues, both technical and interpersonal.

- Receives a notification on his Activity Feed when tagged in a training post.
- Participates in a meeting where he is walked through the training material.
- Responds to a post where the HR Business Partner introduces him to the team.
- Posts questions in an exclusive channel for new hires.
- Views a post in an employee socialization channel and decides to join them for happy hour.

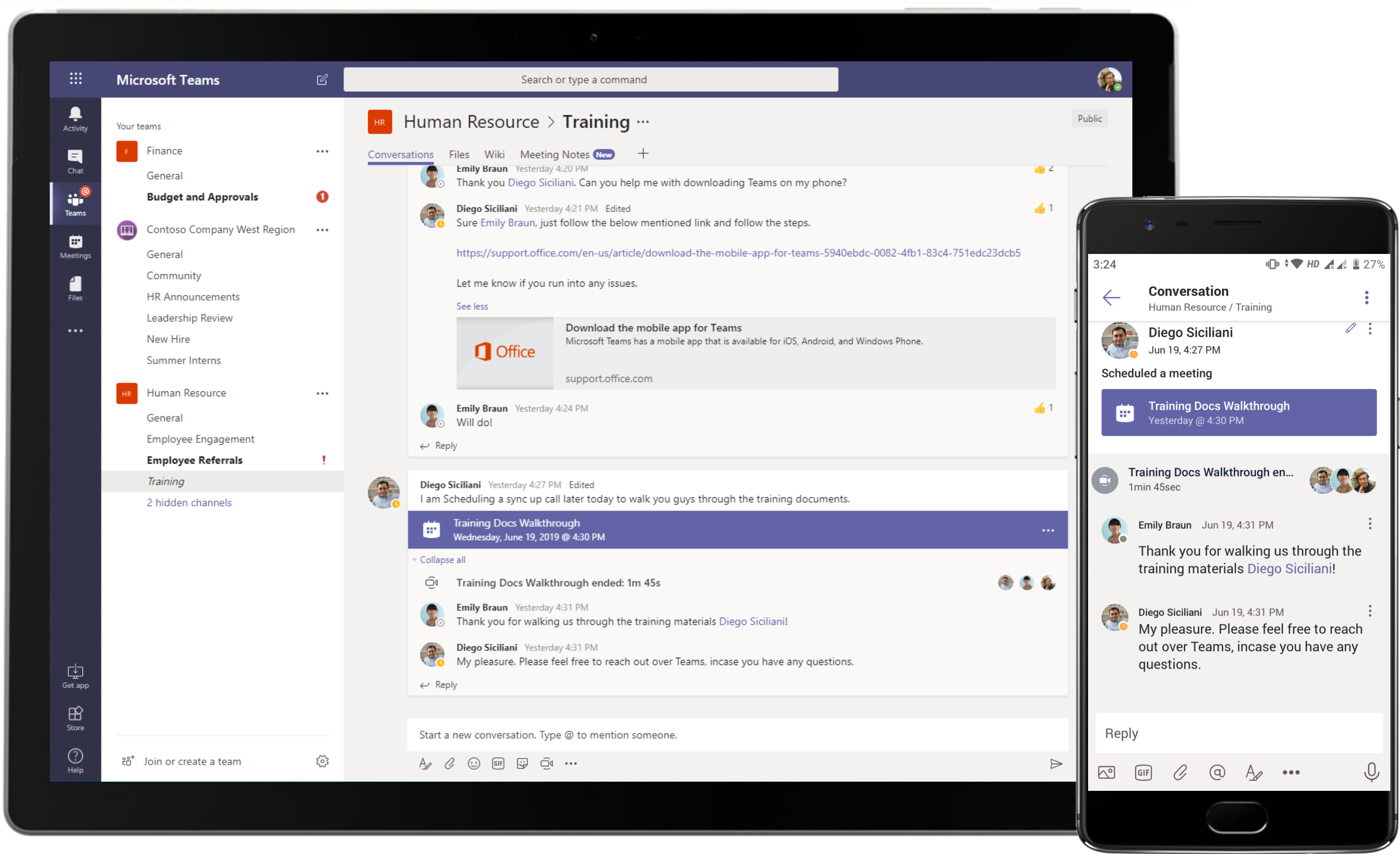
How did Teams help the Analyst execute his roles and responsibilities?

- Create repositories of information to reference for new employees and reduce training costs for the company.
- Create open platforms for discussion, community engagement, and protected communication through designated channels.
- Screen share through protected video calls.

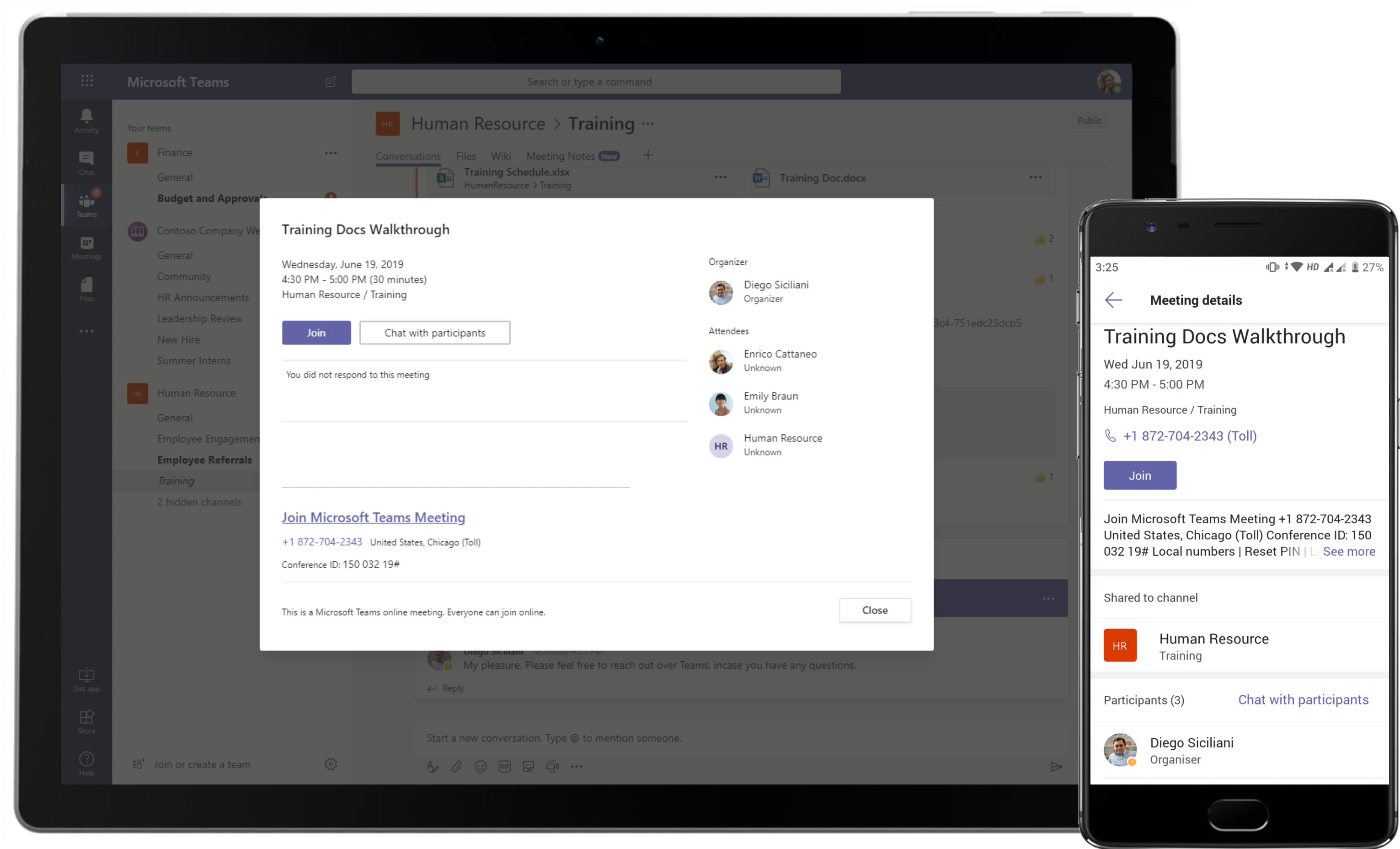
Which app integrations on Teams made it possible?



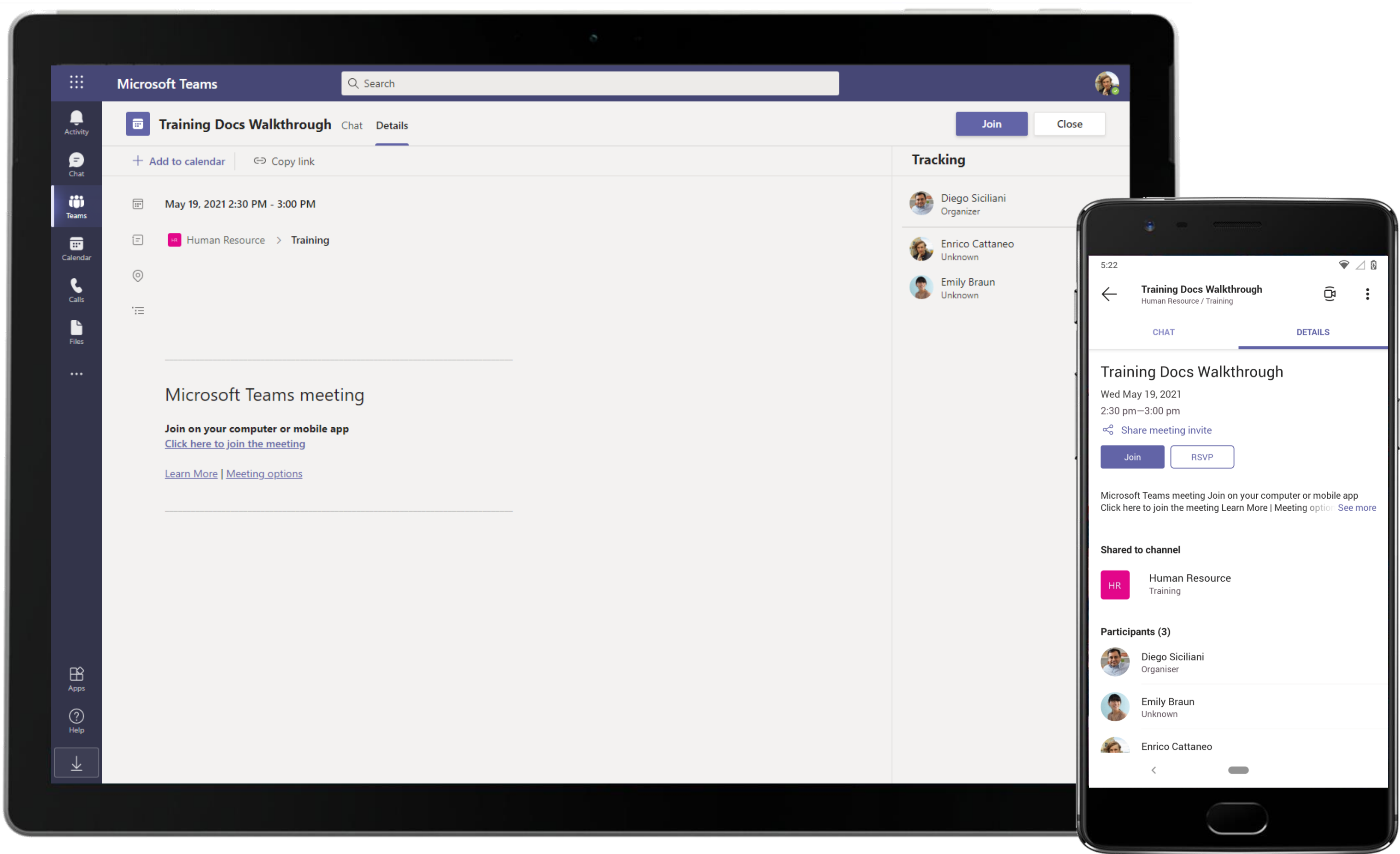
Excel



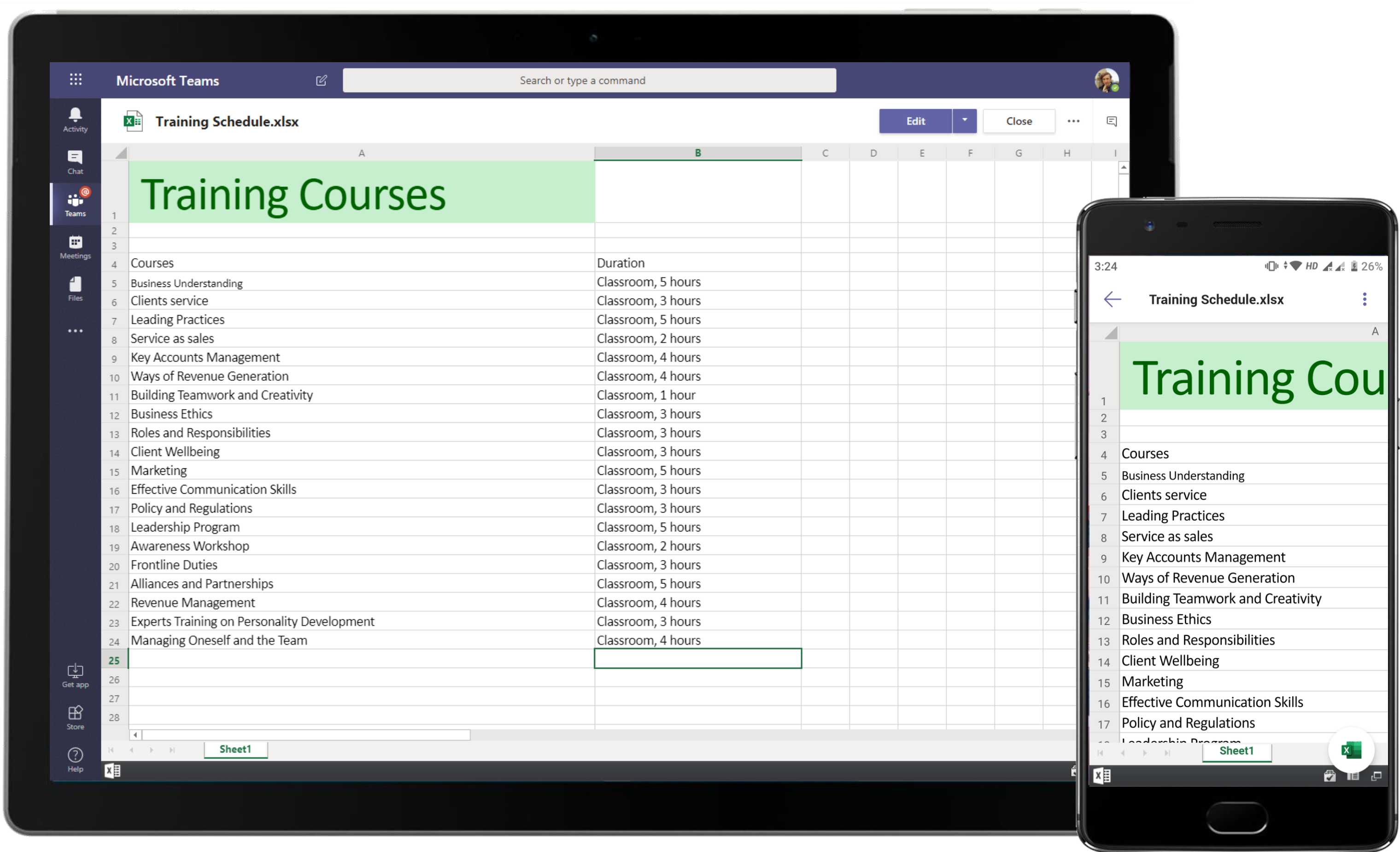
The integrated Forms tab in the channel records information from end-users without sharing URLs or sending emails and also keeps the survey results easily accessible to review by the decision makers.



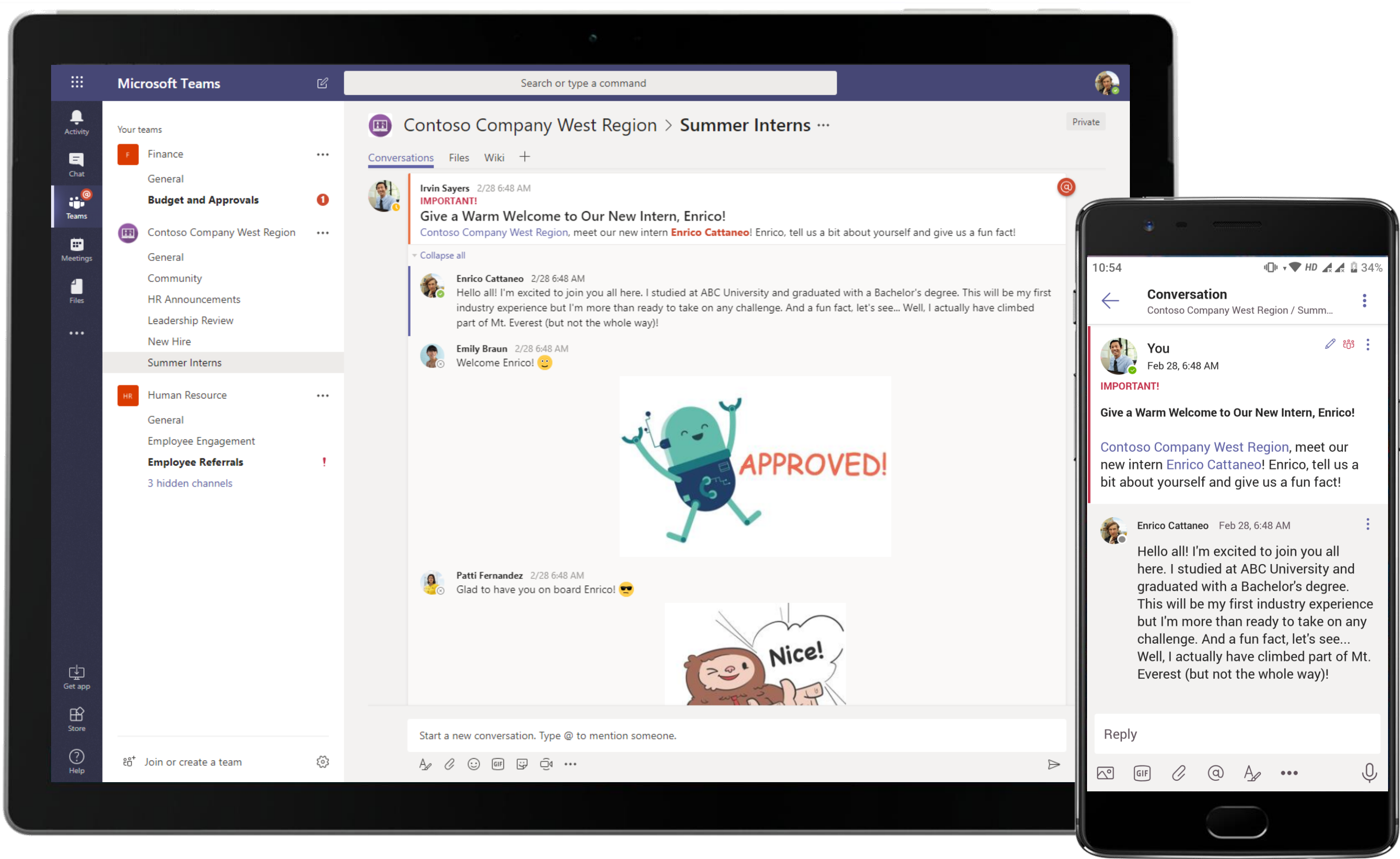
Host regulations and reference material in OneNote for the teams’ easy access and consumption within channels. The Operations Agent has quick access to the OneNote virtually anywhere, anytime across devices and platforms!



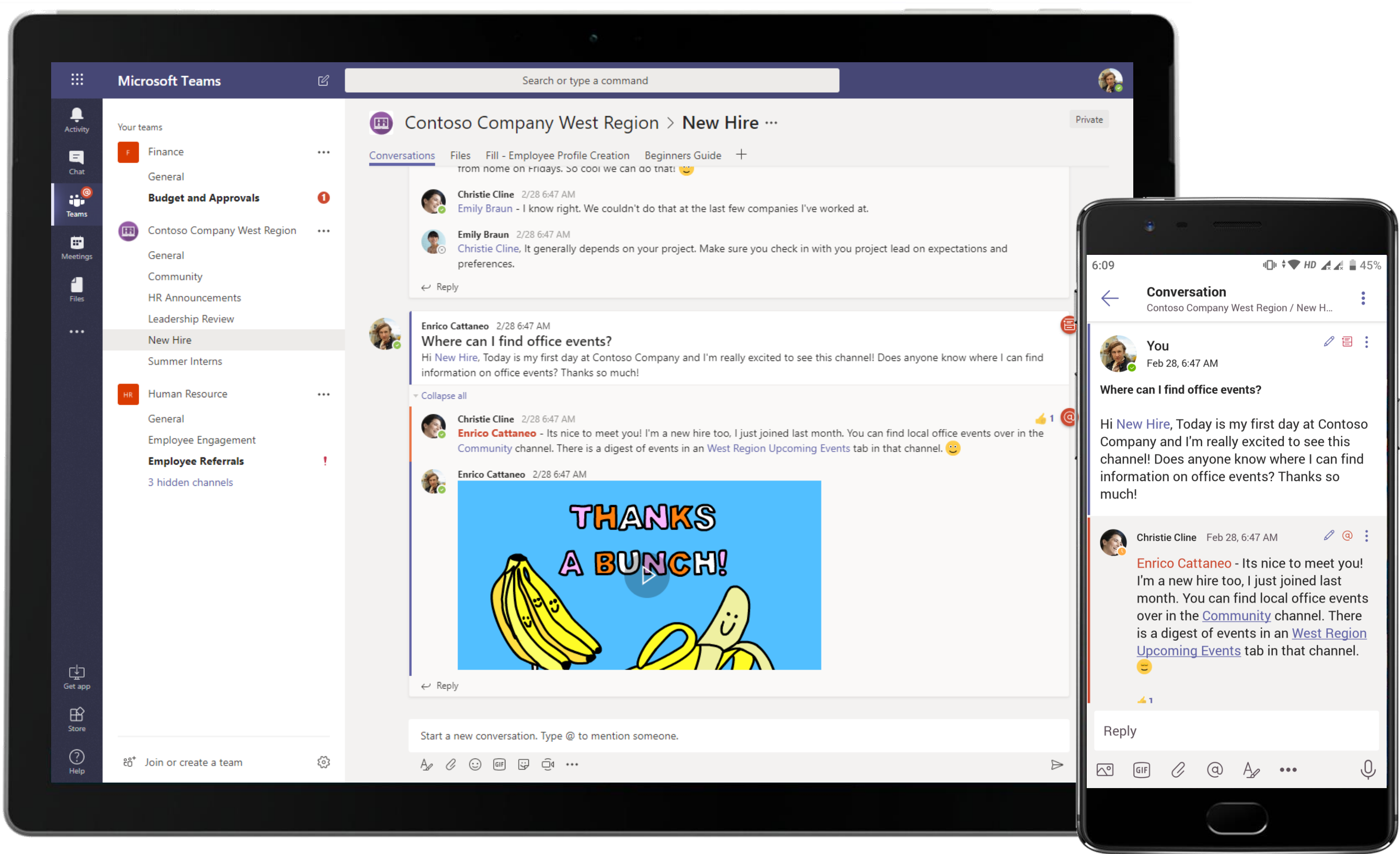
Host regulations and reference material in OneNote for the teams' easy access and consumption within channels. The Operations Agent has quick access to the OneNote virtually anywhere, anytime across devices and platforms!



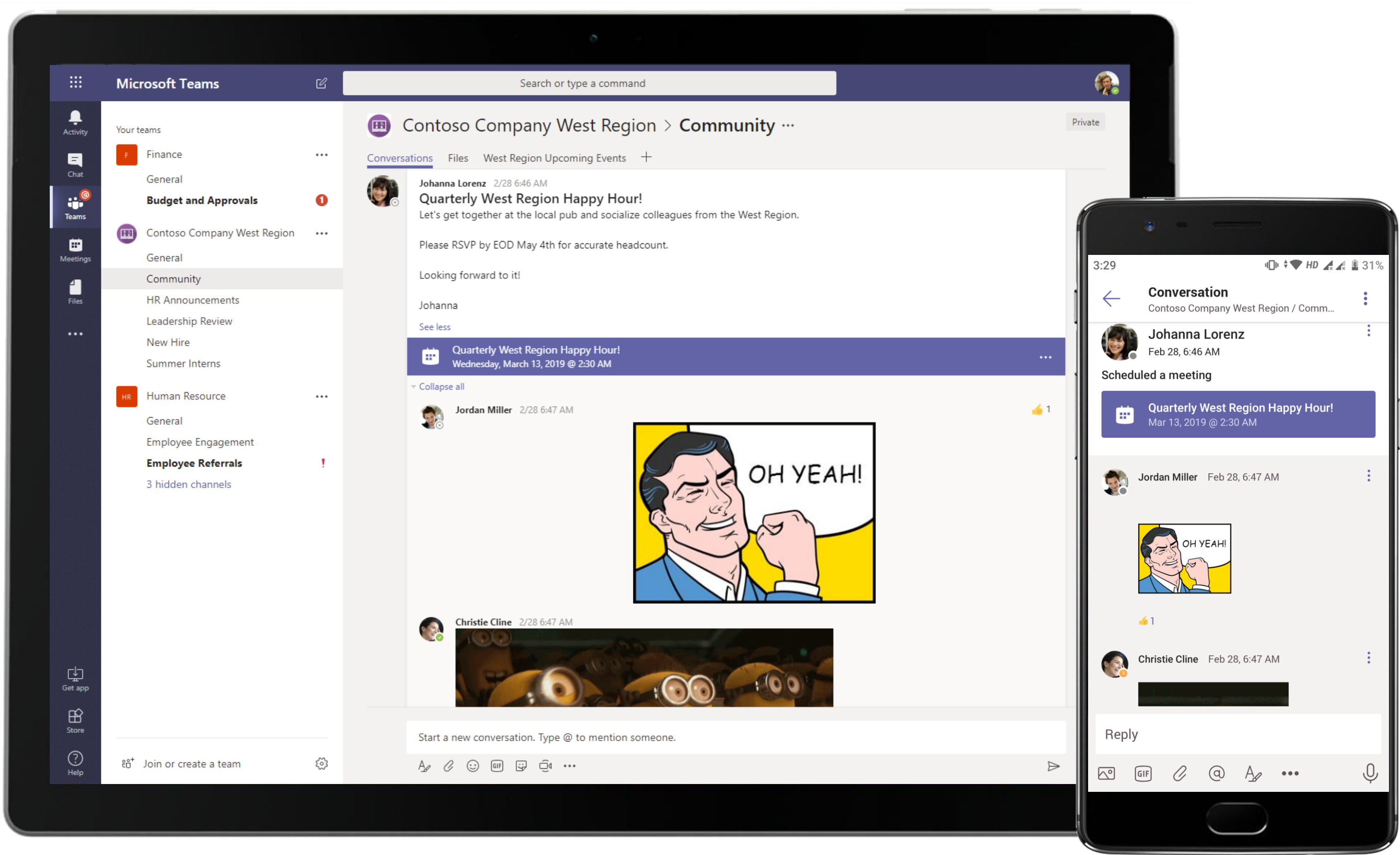
The Operations Agent uses channel conversations to relay updates to team members and kick-start a process flow for task completion.



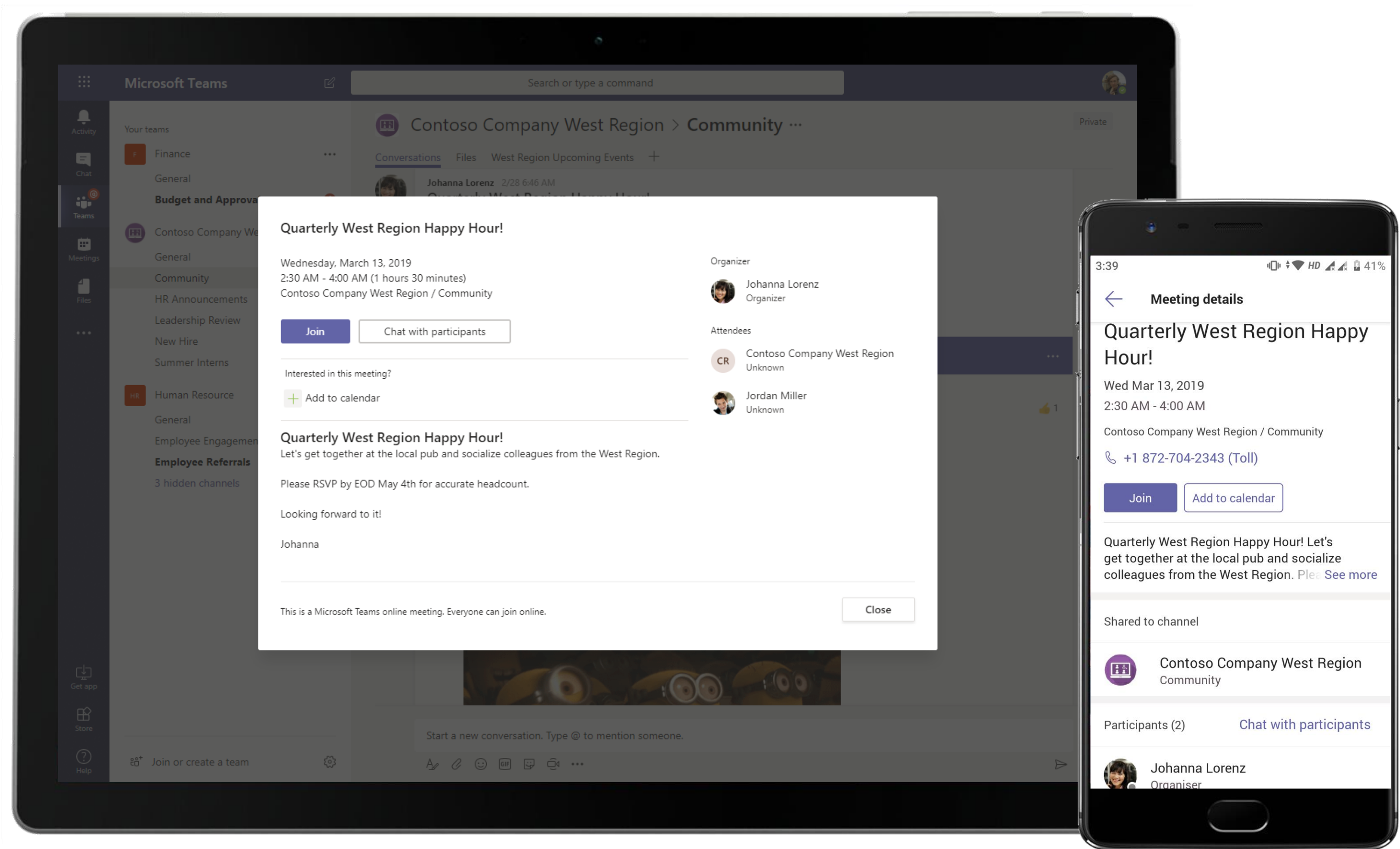
The custom-built app Flight Information Bot helps the Operations Agent search for alternative flight schedules, seat availability between locations and take actions such as rebooking a passenger to another flight without leaving Teams.



Add tabs for files, notes, websites and apps, making it easy for team members to access frequently used content or services with just one tap. Start a conversation about a tab to discuss its contents with team members.



Build dynamic data visualizations, measure metrics and track analytics through Power BI within Teams. The Operations Agent uses Power BI to check the passenger score for involuntary bumping enabling faster business decision making!



Microsoft Teams conversations are threaded so users can reply directly in-context to specific conversations, while keeping relevant discussions and files grouped together. Files can be attached or referenced in these conversations as well.



Competency and Compliance Training

UX Designer

Scenario Walkthrough

Contoso uses Microsoft Teams to make competency training a positive and fun experience for their employees, while also ensuring the training stays relevant for each job title. A User Experience (UX) Designer has recently been promoted to a Consultant level at Contoso, which will require extra training for him. A chain of events within Contoso are set off to ensure that he will be at the expected level of knowledge and capability for his new position.

- Initiates a 1:1 conversation with the Talent Community Lead about what is expected of him in his new role.
- Talent Community Lead guides him to the team and channel that house the training material that the UX Designer requires.
- Reviews training material and videos shared using the YouTube messaging extension within the channel.
- Participates in a group chat regarding staffing confirmation.
- Receives project training in a channel and connects with the UX Design Lead.
- Clarifies questions around the training material over 1:1 chat.

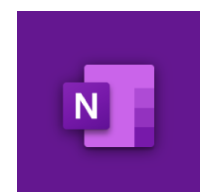
How did Teams help the UX Designer execute his roles and responsibilities?

- Hold conversations and meetings over the protected platform of Teams.
- Use OneNote for sharing and collaborating over training material.
- Share a YouTube video with other members of the channel by simply pasting its URL.

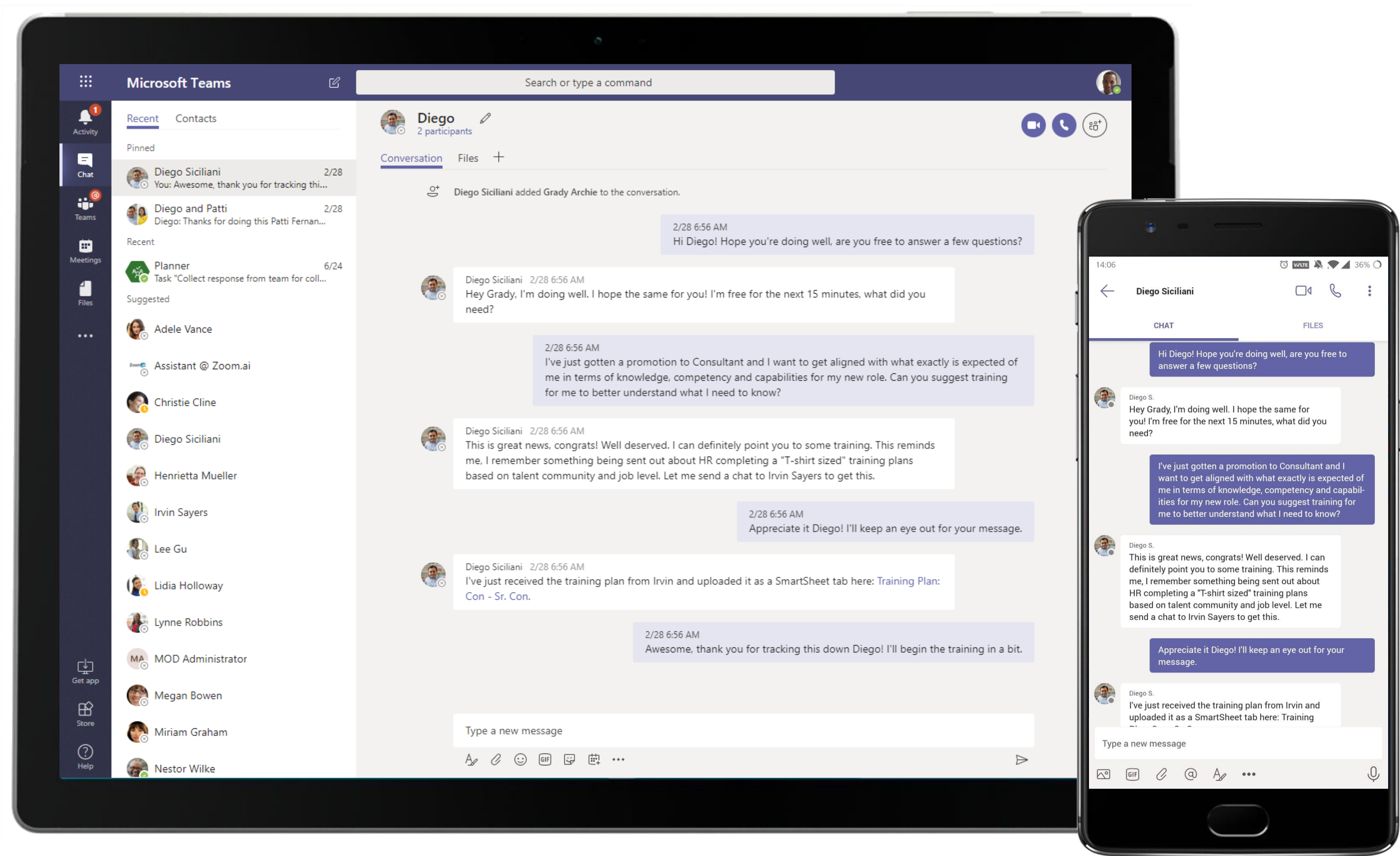
Which app integrations on Teams made it possible?



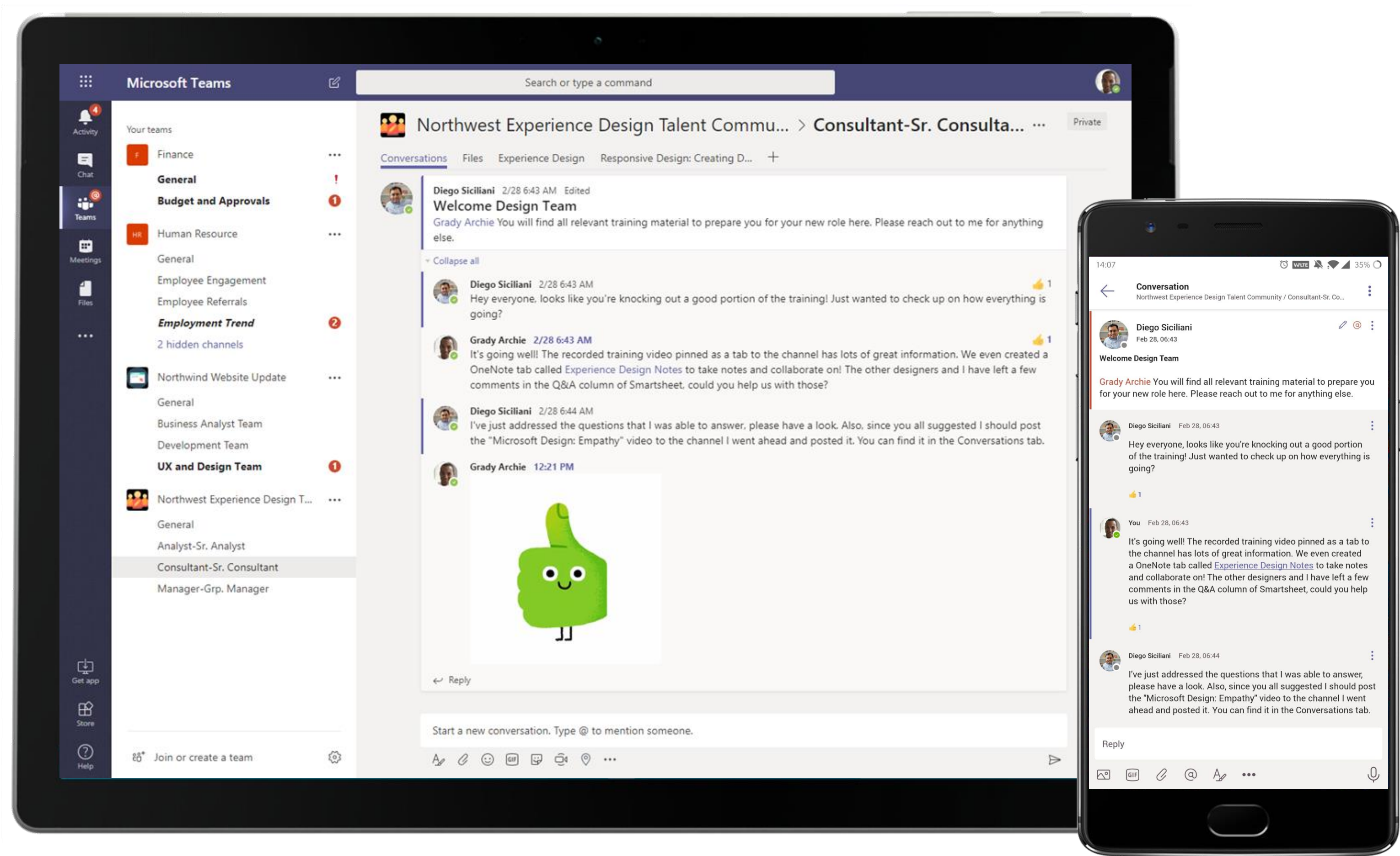
YouTube



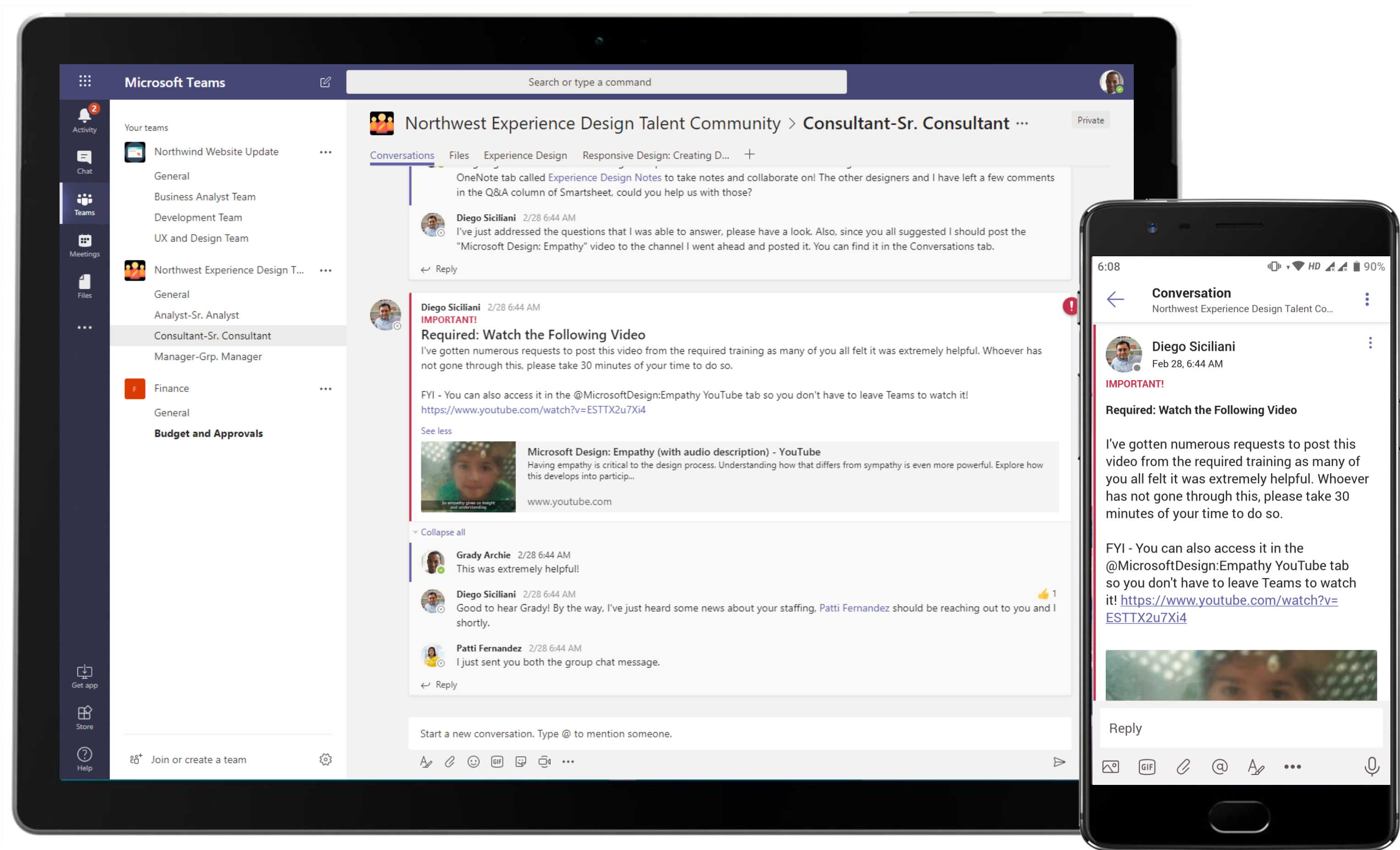
OneNote



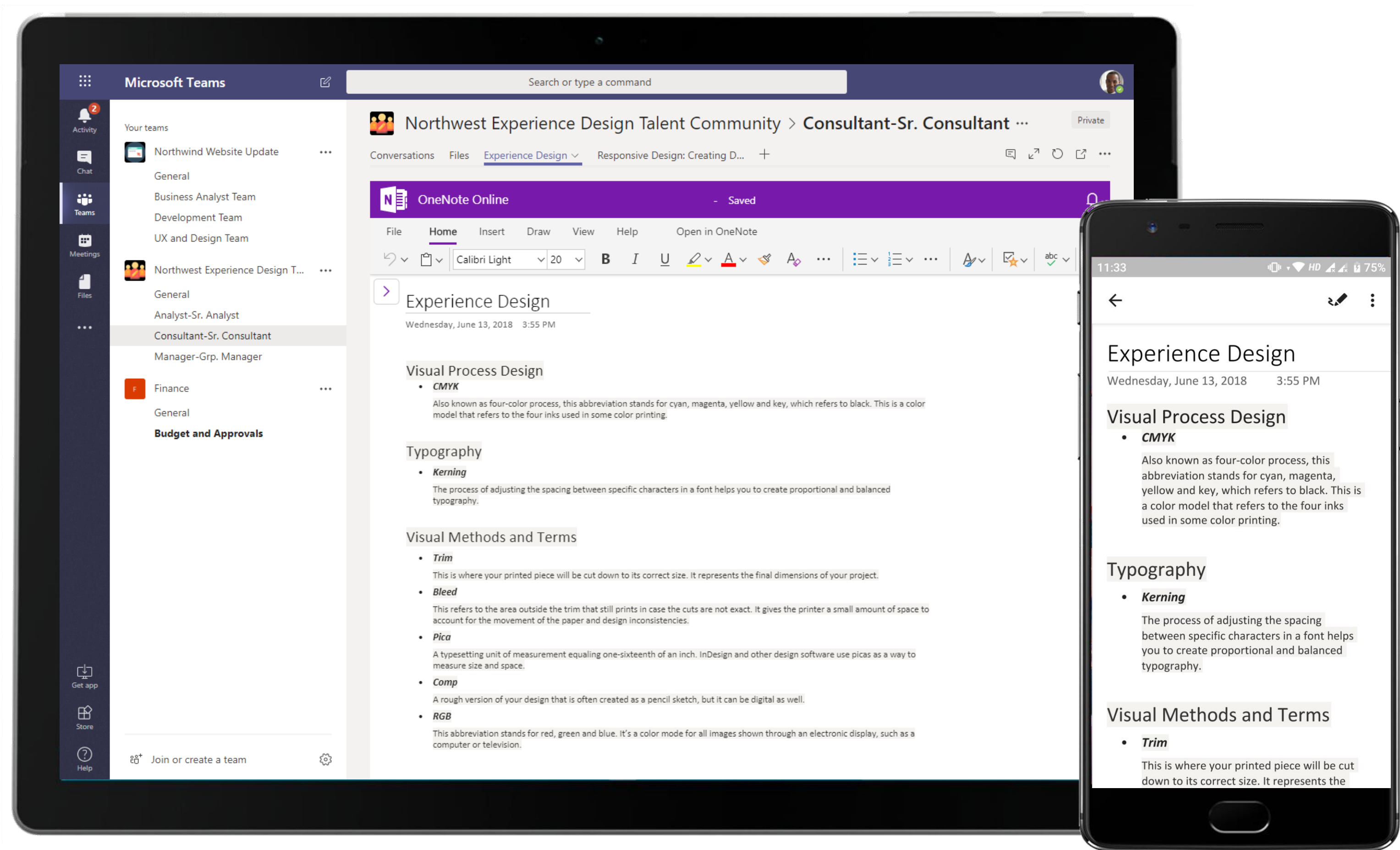
Quickly reach out to and chat with co-workers. Take conversations offline from channels for 1:1 discussions, just like the conversation here between UX Designer and the Talent Community Lead.



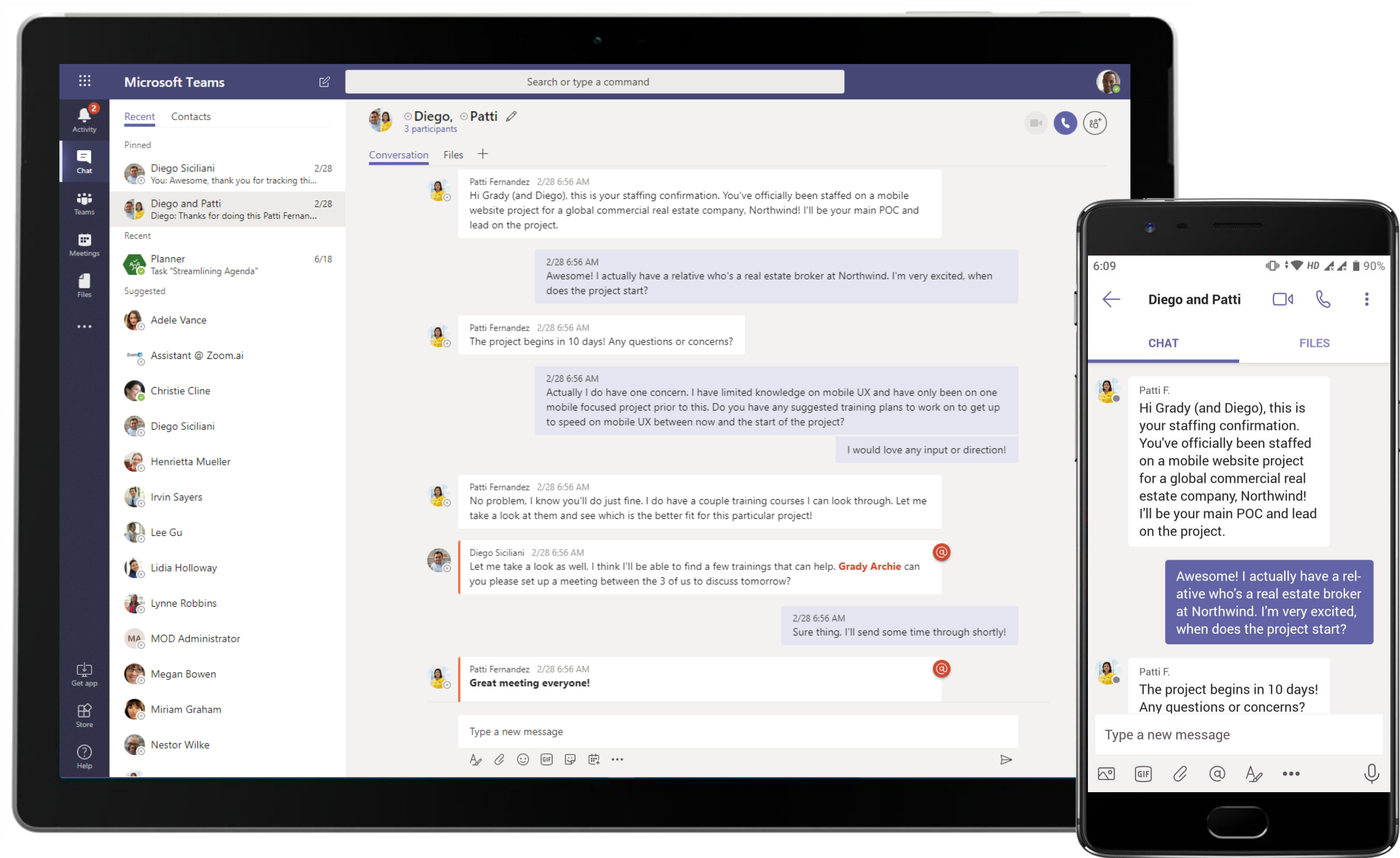
Channel conversations can contain a lot things – conversations, files shared by team members, meeting threads, and GIFs! Use social features like reacting to team members’ conversations and responses to acknowledge them.



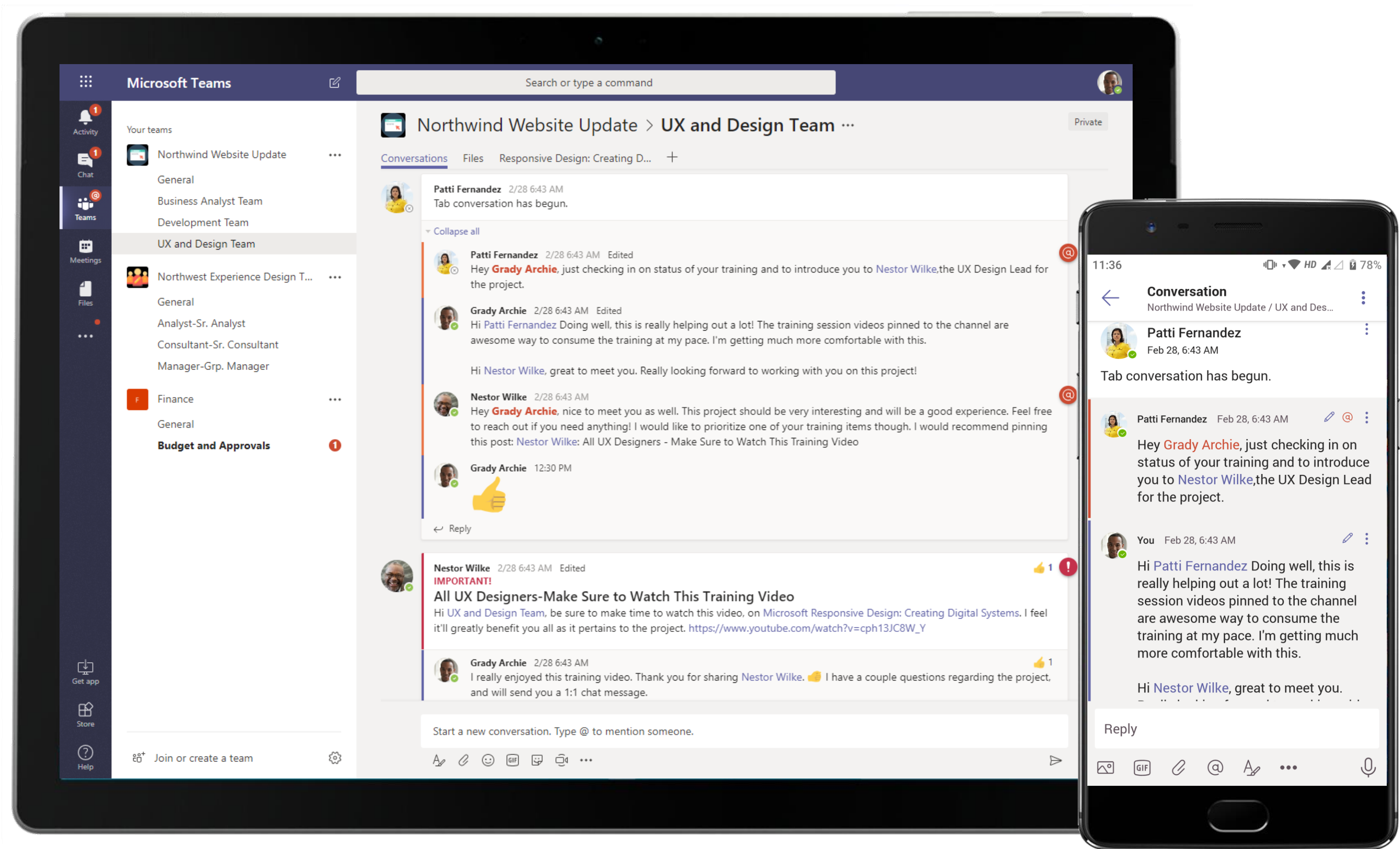
Teams and channels are where you hold meetings, have conversations and work on files together with team members. The Talent Community Lead marks as important his message and recommends watching a training video.



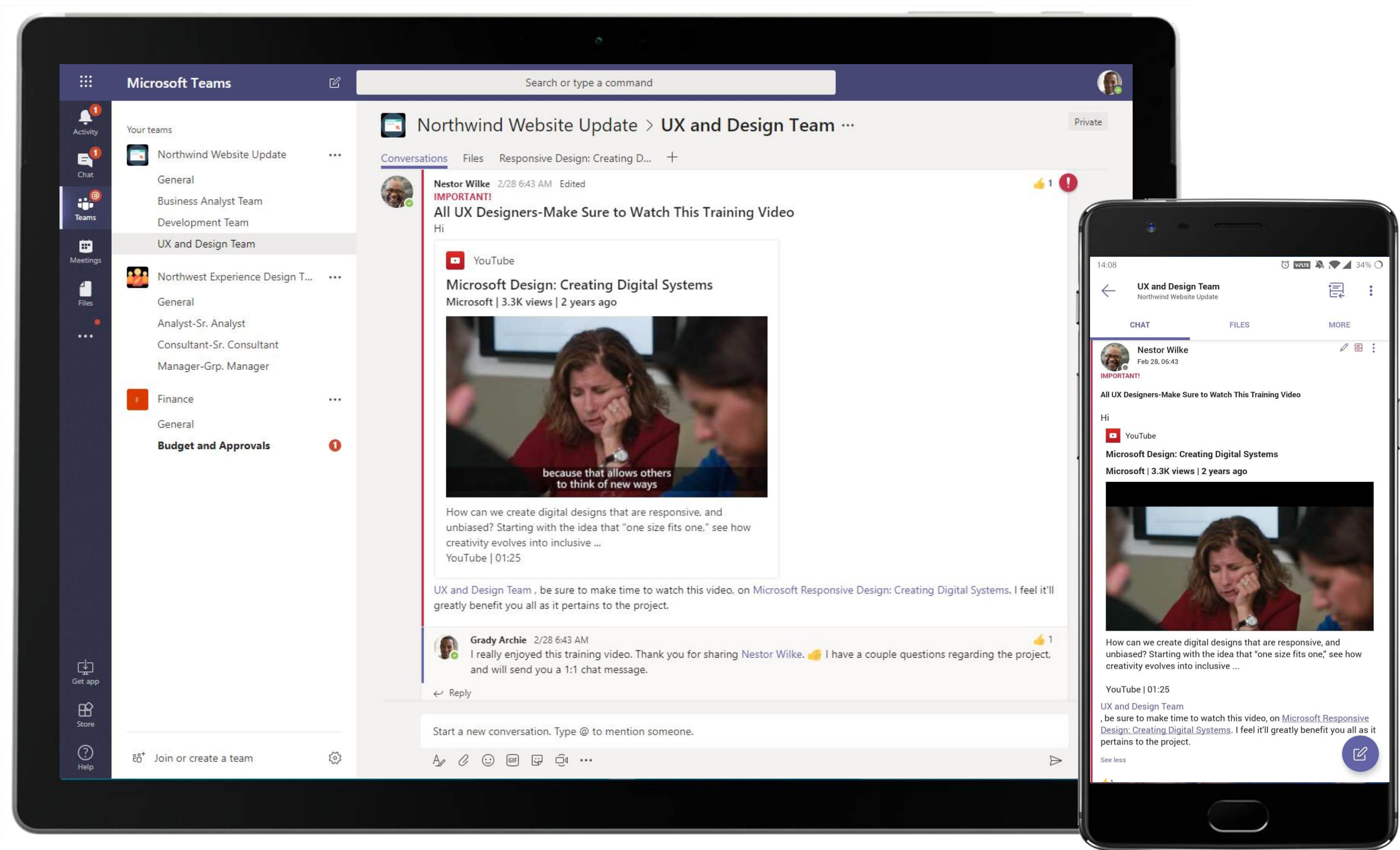
Add a OneNote tab to your channel in Microsoft Teams and use it as a shared space for notes among team members. The UX Designer views the design training material shared in OneNote tab.



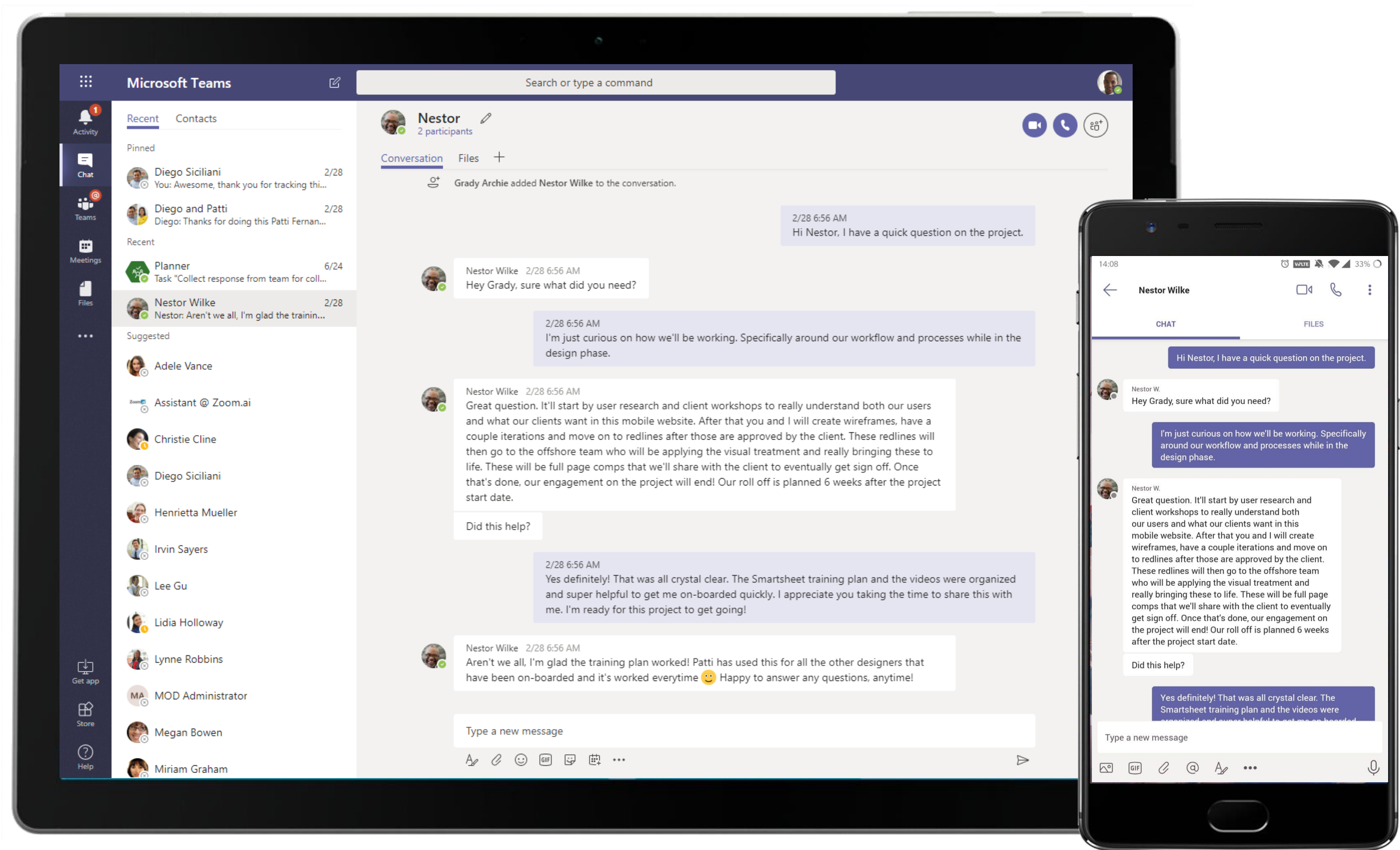
Use a private one-on-one chat or a group chat for conversations that don't require the entire team. The UX Designer engages in a group chat with the Talent Community Lead and another colleague.



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.



Share a YouTube video with other members by simply pasting the URL in the channel. The lead shares a training YouTube video for the team to watch.



Quickly reach out to and chat with co-workers. Take conversations offline from channels for 1:1 discussions.



Sales

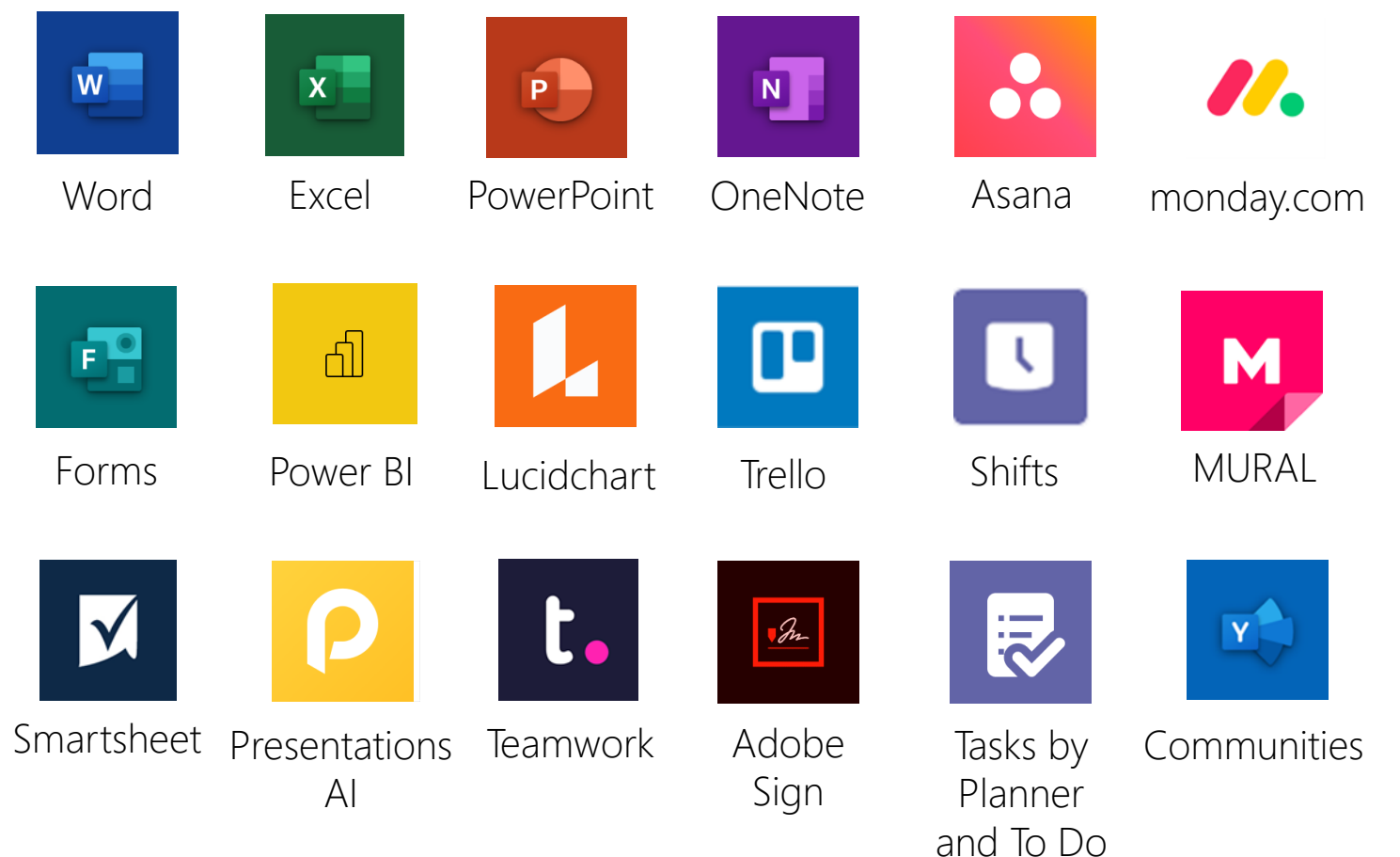
These scenarios will illustrate how Teams can help different Sales roles in quickly turning data into actionable insights, automating manual and repetitive processes and driving better decisions through collaboration.

Sales Superpowers in Teams

Capabilities and features used...

- Organize quick, open-channel communication
- Store documents within a cloud-enabled repository with Files
- Real-time, contextual file sharing and co-authoring
- Help securely collaborate with teammates using familiar applications all in a single place

Apps that enable an immersive experience in Teams



Meet the Business Decision Makers

Sales



Sales Manager

"I play an exciting game of numbers every day. I work with marketing to improve our numbers and create sales reports for the finance team to assess."

- Develop strategic sales plans that covers sales, revenue and expense controls
- Track sales goals with team
- Determine annual unit and gross-profit plans by analysing trends and results



Account Manager

"My goal is to provide customers personalized services to make sure they keep coming back to us."

- Build and maintain strong, long-lasting customer relationships
- Oversee customer account management, including negotiating contracts and agreements to maximize profit
- Offer special packages to companies or organizations hosting large events

Meet the Business Decision Makers

Sales



Sales Manager

"Setting up goals is the first step in turning the invisible into visible."

- Manage organizational sales by developing a business plan that covers sales, revenue and expense controls
- Meet planned sales goals
- Set up individual sales targets with the sales team



Sales Analyst

"Identifying potential markets is just the first step. I need to be able to consolidate market research and forecasts into a feasible sales plan."

- Identify potential market and customer base
- Drive sales efforts towards potential markets
- Prepare forecasts and analysis for different markets



Building a Sales Summary

Sales Manager

Scenario Walkthrough

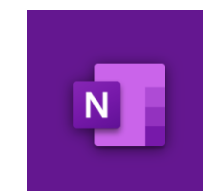
The Sales team constantly interfaces with Marketing and Finance to coordinate their efforts, forecasts and analysis. To that end, the Sales Manager here builds a sales summary for Finance to incorporate in their P&L summary. Find out how Teams offers her the platform to coordinate and share business critical information with enterprise security.

- Creates an exclusive team for Sales, Marketing and Finance managers to sync their efforts.
- Receives meeting invite from Finance Manager to discuss need for a sales summary.
- Uses OneNote to capture meeting notes.
- Uses the meeting thread to request Sales Executive to help build sales summary.
- Sales Executive completes the summary and uploads the Excel spreadsheet to the Files tab in the channel for review.
- Sales Manager tracks the conversation and ensures that her team delivers the spreadsheet.

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

- Use a dedicated team to prepare and collaborate on a plan of action for business-critical tasks.
- Create impactful summaries of crucial data with Excel and OneNote for Microsoft Teams.
- Share documents, slide decks and materials through the Files tab repository.

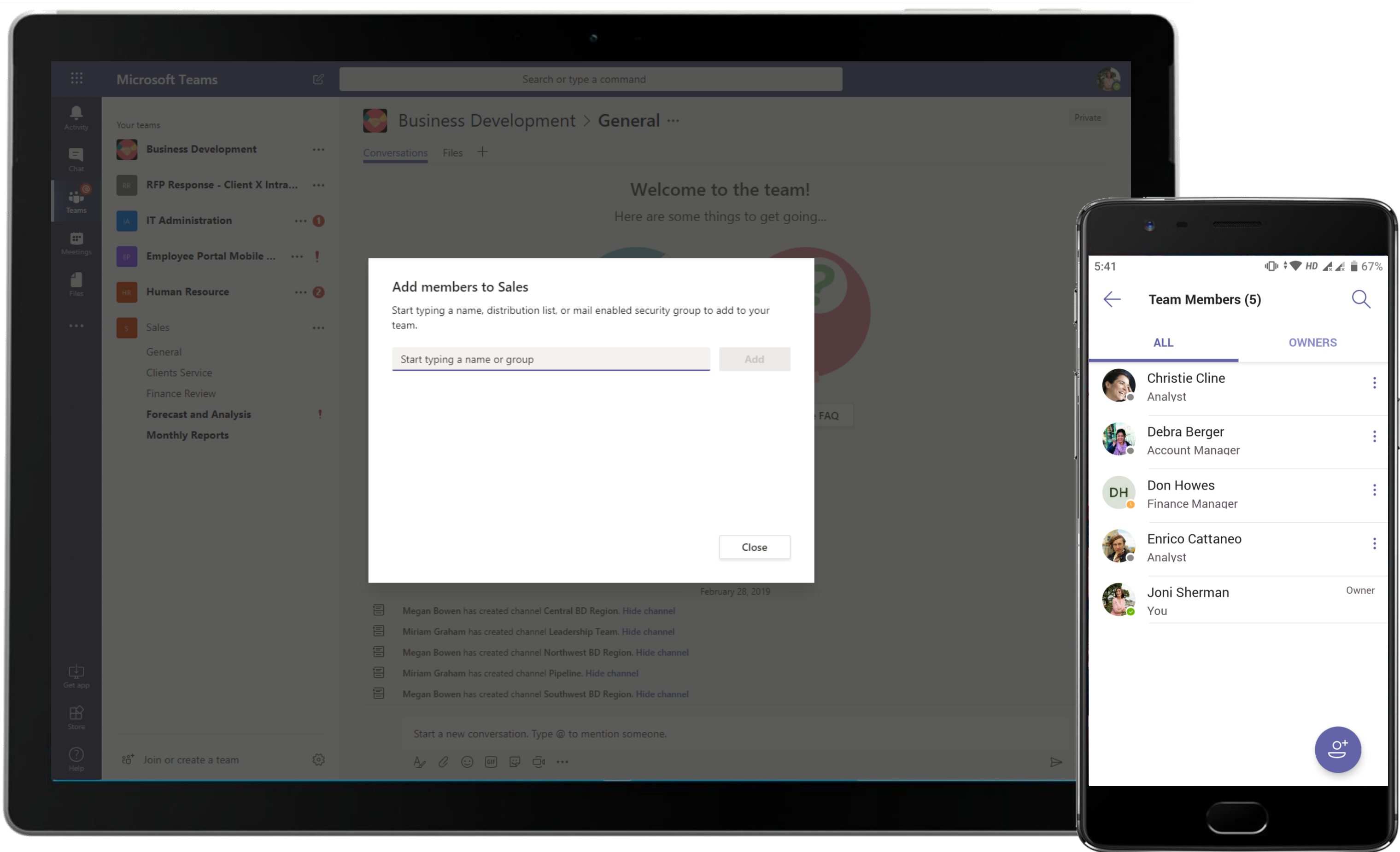
Which app integrations on Teams made it possible?



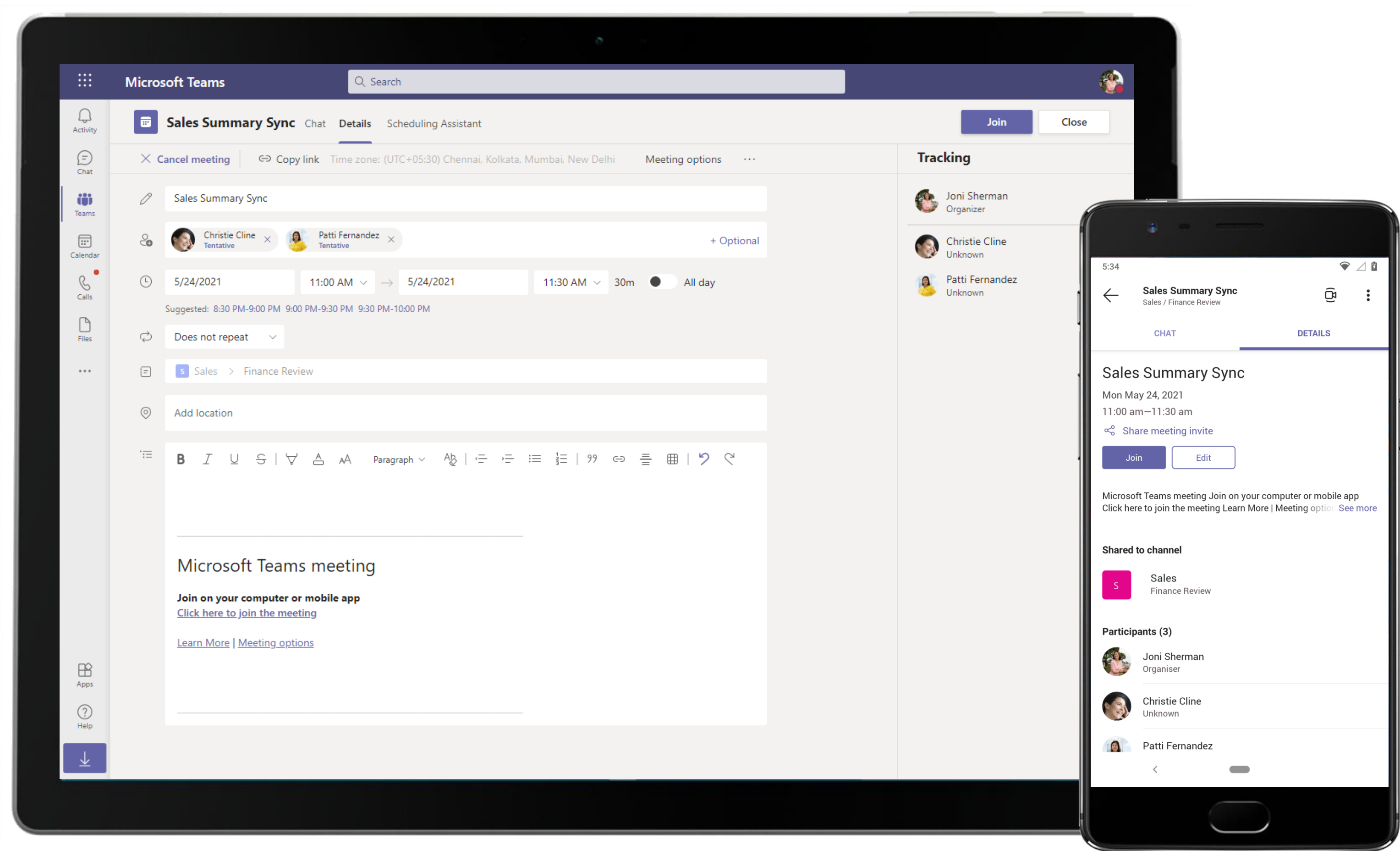
OneNote



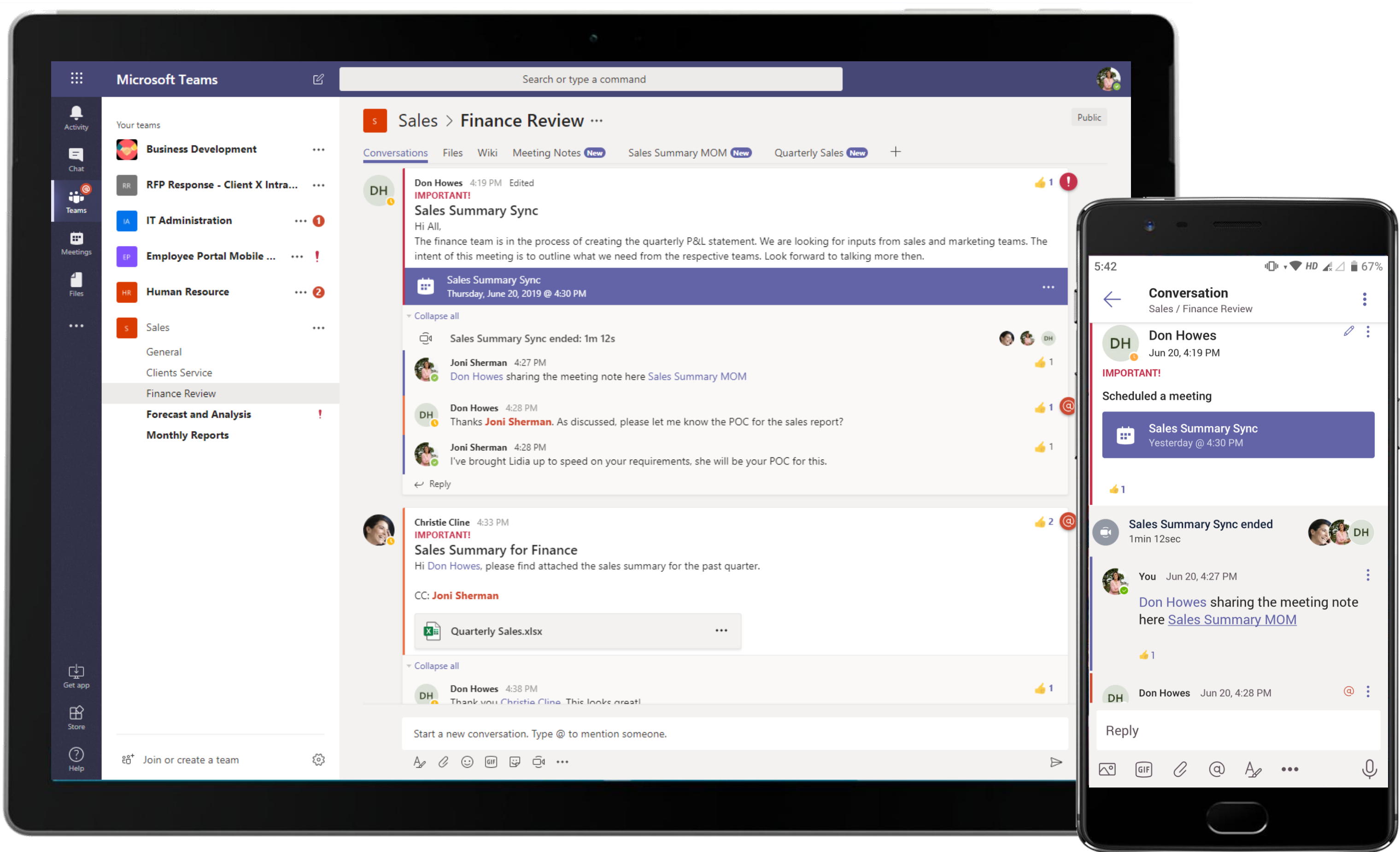
Excel



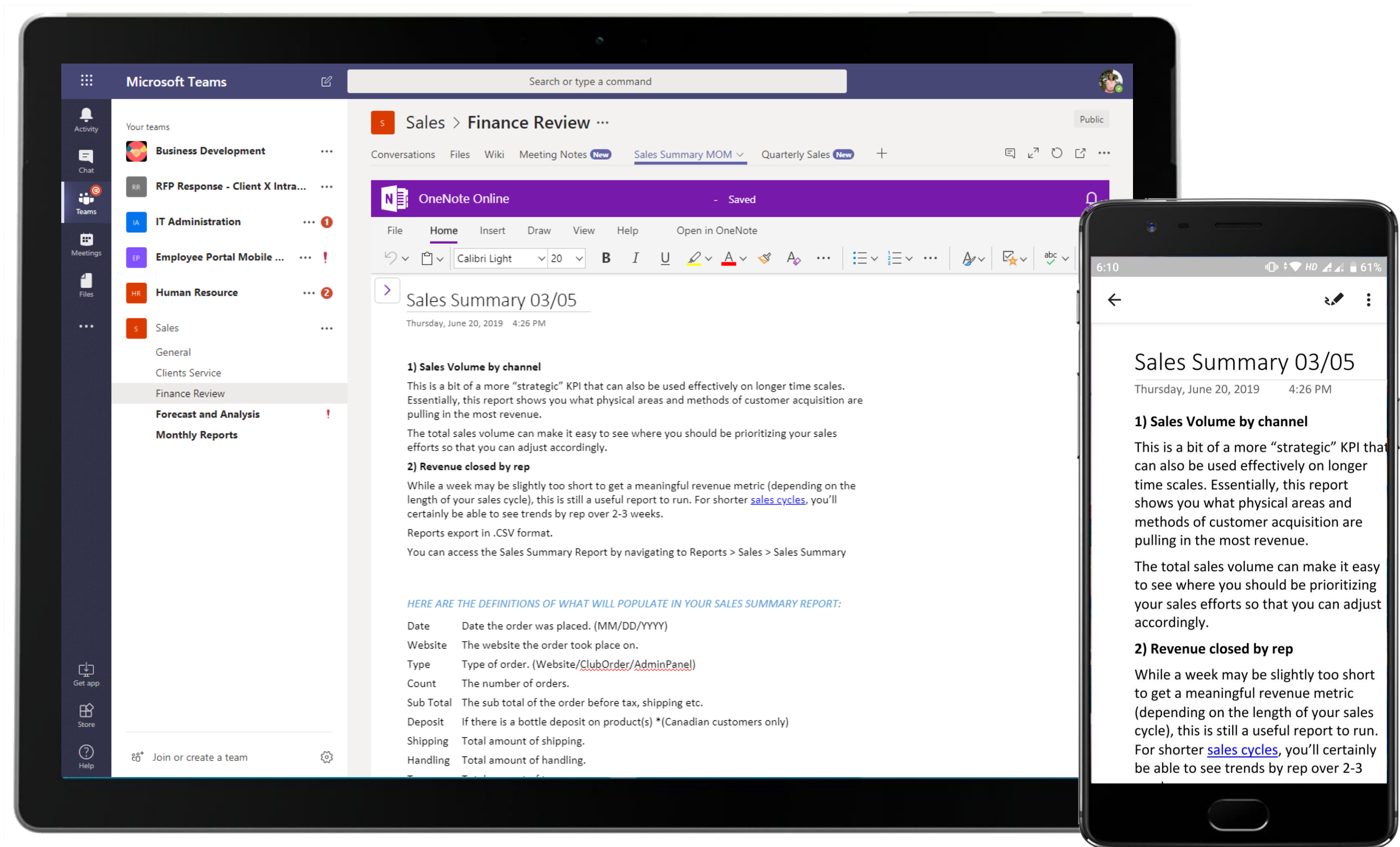
Use a dedicated team to prepare and collaborate on a plan of action. The Sales Manager creates an exclusive team for managers from various business units to sync their efforts.



She receives a meeting invite for a sync call. With Microsoft Teams, you can easily schedule meetings and find the best available times for invitees through the native scheduling calendar.



Use the meeting thread in channels or chats for follow-up conversations about meeting outcomes, action items and brainstorming. The Sales Manager uses the thread to share her meeting notes/MOMs with her team members.



The screenshot displays the Microsoft Teams interface. On the left, the 'Your teams' list includes Business Development, RFP Response - Client X Intra..., IT Administration, Employee Portal Mobile..., Human Resource, and Sales. The 'Sales' team is selected, and the 'Finance Review' channel is active. The main content area shows a OneNote Online document titled 'Sales Summary 03/05' with a timestamp of 'Thursday, June 20, 2019 4:26 PM'. The document content includes:

- 1) Sales Volume by channel**

This is a bit of a more "strategic" KPI that can also be used effectively on longer time scales. Essentially, this report shows you what physical areas and methods of customer acquisition are pulling in the most revenue.

The total sales volume can make it easy to see where you should be prioritizing your sales efforts so that you can adjust accordingly.
- 2) Revenue closed by rep**

While a week may be slightly too short to get a meaningful revenue metric (depending on the length of your sales cycle), this is still a useful report to run. For shorter [sales cycles](#), you'll certainly be able to see trends by rep over 2-3 weeks.

Reports export in .CSV format.

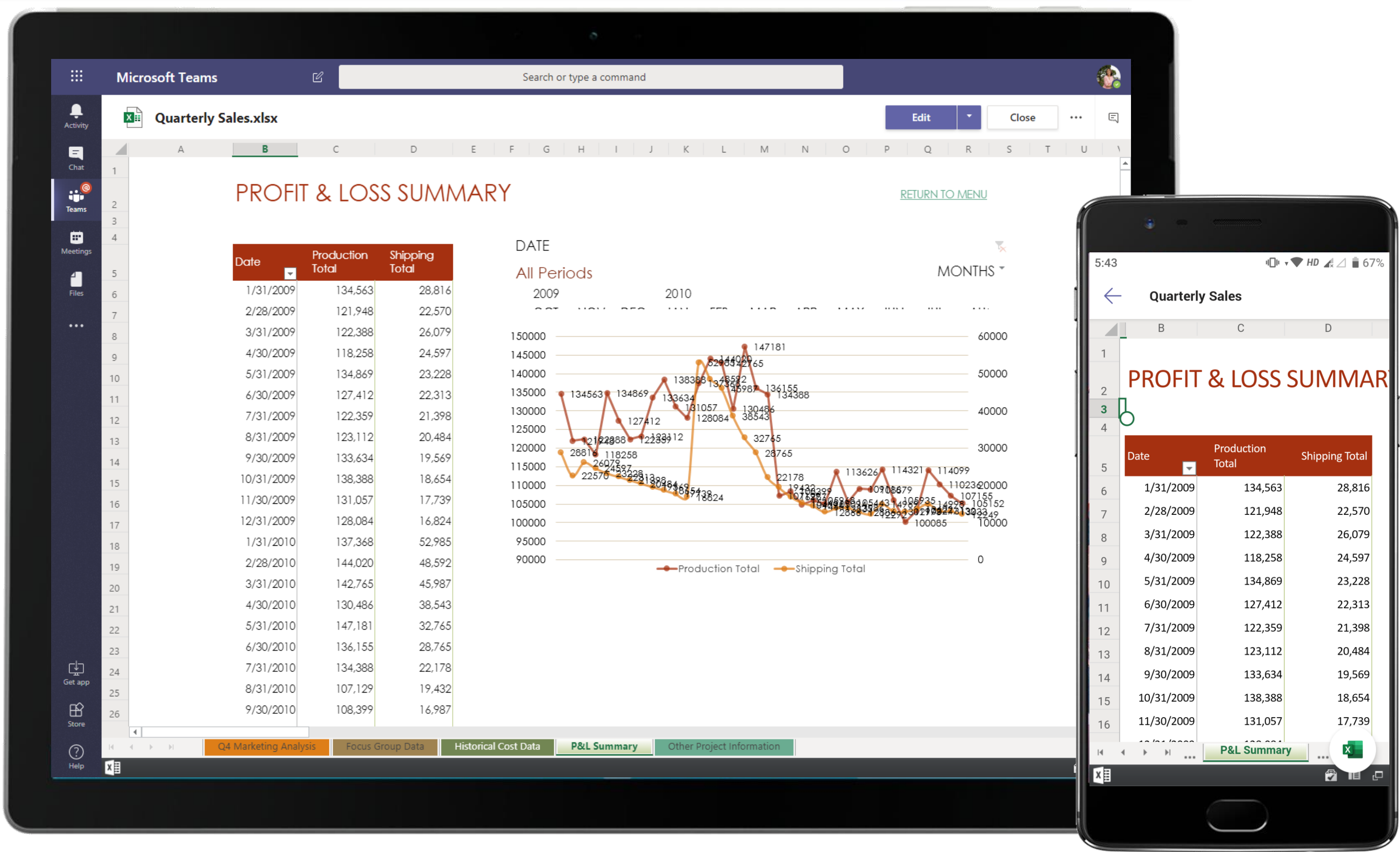
You can access the Sales Summary Report by navigating to Reports > Sales > Sales Summary

Below the text, there is a section titled 'HERE ARE THE DEFINITIONS OF WHAT WILL POPULATE IN YOUR SALES SUMMARY REPORT:' followed by a table:

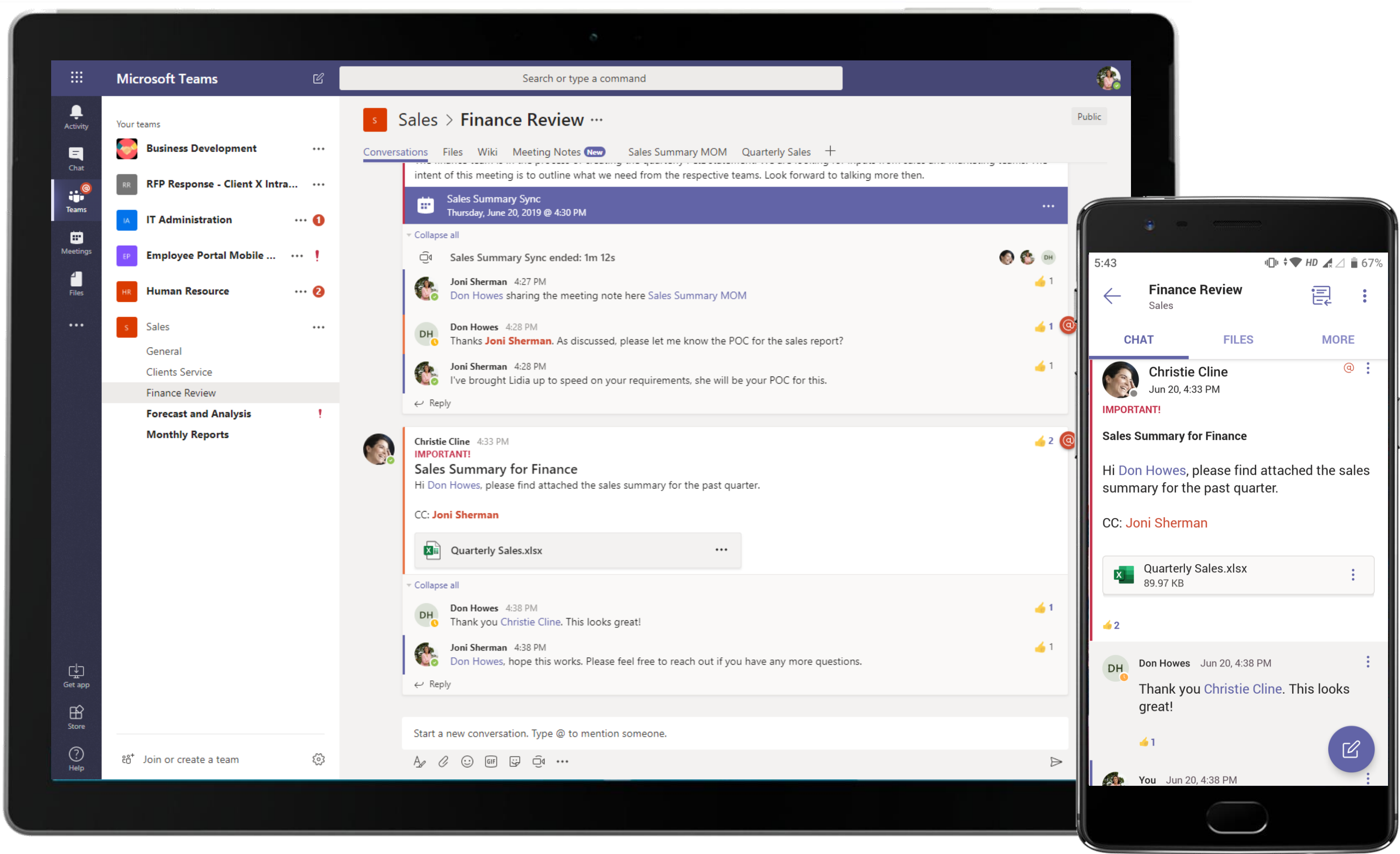
Field	Description
Date	Date the order was placed. (MM/DD/YYYY)
Website	The website the order took place on.
Type	Type of order. (Website/ <u>ClubOrder/AdminPanel</u>)
Count	The number of orders.
Sub Total	The sub total of the order before tax, shipping etc.
Deposit	If there is a bottle deposit on product(s) *(Canadian customers only)
Shipping	Total amount of shipping.
Handling	Total amount of handling.

On the right, a smartphone displays the same OneNote document content, showing the title 'Sales Summary 03/05' and the first section '1) Sales Volume by channel'.

Collaborative and powerful document creation with OneNote in Microsoft Teams enables quick dissemination of notes and status updates among team members. OneNote tabs pinned in channels means you don't go looking for notes.



The Sales Executive uses Excel to build and present her data to the team. Create impactful summaries of crucial data with Excel, Word and OneNote for Microsoft Teams – deeply integrated in your workspace.



Open channel conversations among team members help the Sales Manager track messages and ensure her team delivers the sales summary accurately and on-time. The in-progress sales summary can be previewed in channel.



Directing the Employee Path to Expertise

Sales Manager

Scenario Walkthrough

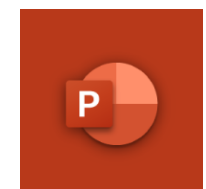
Contoso wants to ensure they provide clients with a wealth of information to make an informed decision about choosing their services. A Sales Manager at Contoso wants to work on equipping the client service team with the right communication to pass on to clients, and she uses Microsoft Teams to coordinate these efforts.

- Creates a new team and channel for Sales and Clients Service to share information.
- Invites Client Service team for a kick-off call for knowledge transfer.
- Walks them through a PowerPoint deck that details actions items using screenshare.
- Creates a post in the channel highlighting meeting outcomes and guidelines.
- Responds to the Account Manager's questions in the conversation thread.
- Sets the plan in motion.

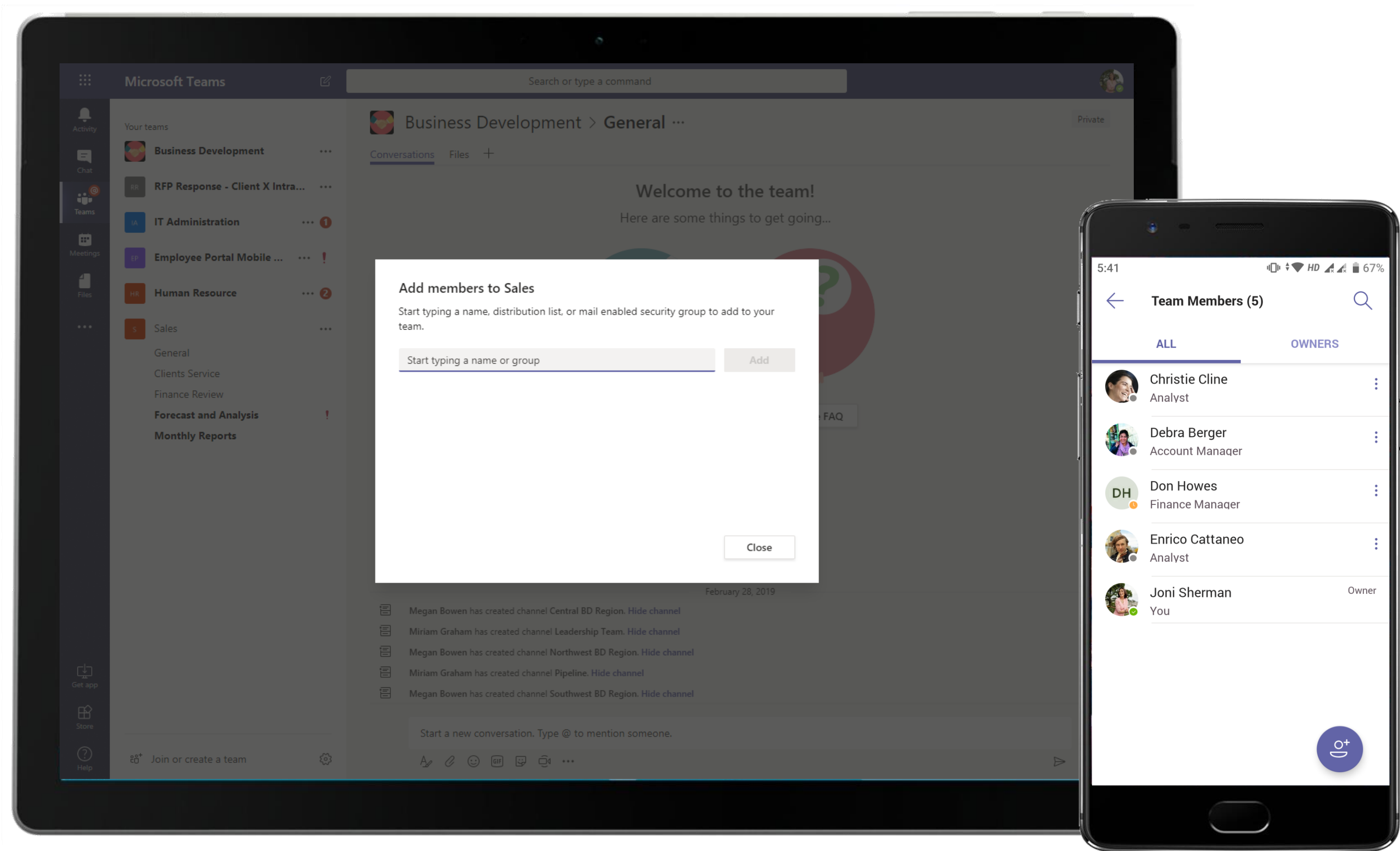
How did Teams help the Sales Manager execute her roles and responsibilities?

- Collaborate and work with team members through distinct, thread-based channel conversations.
- Screenshare documents and slide decks over calls and save them as reference material in the Files tab.
- Integrated Office 365 applications like PowerPoint help build data summaries and visual presentations.

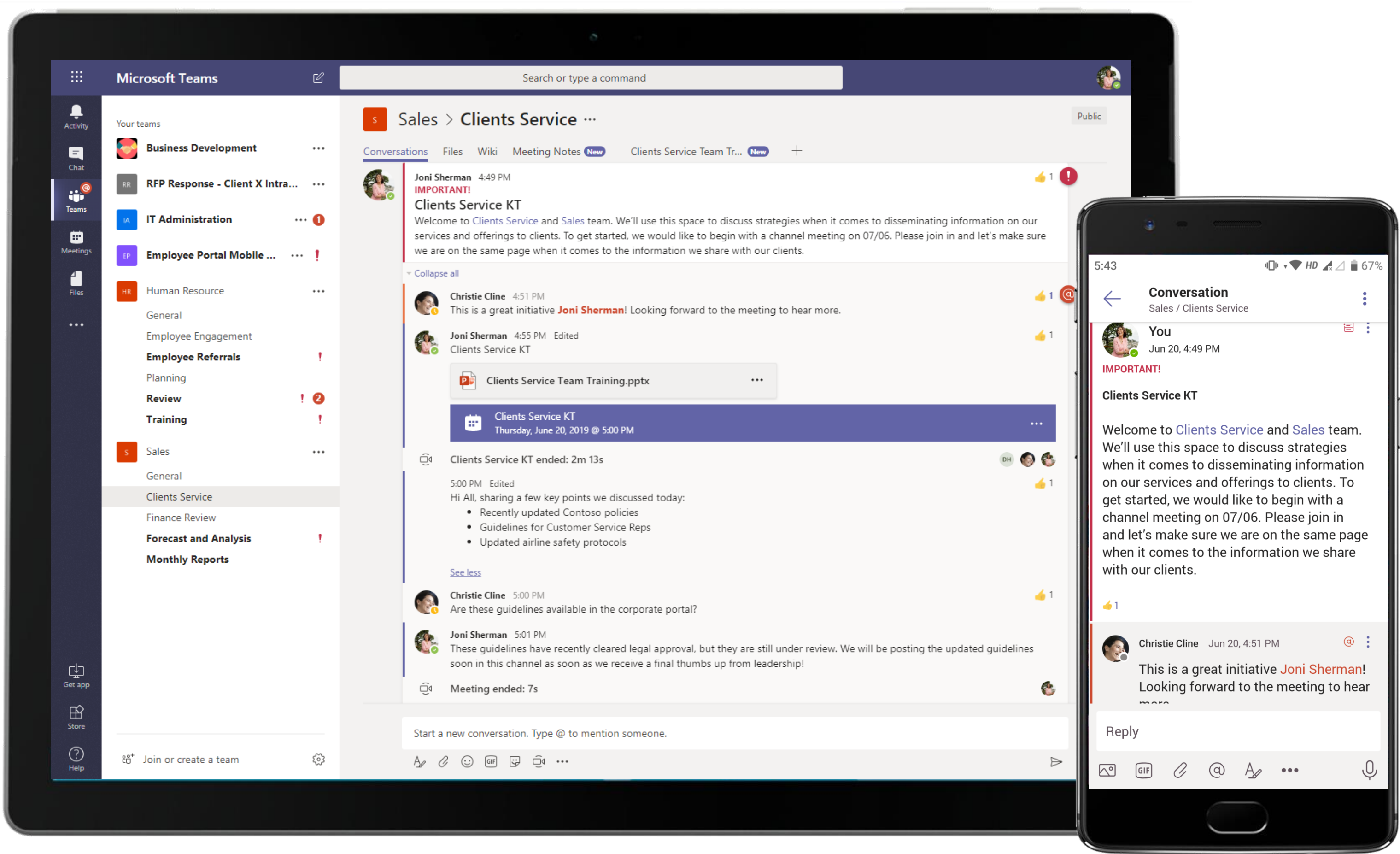
Which app integrations on Teams made it possible?



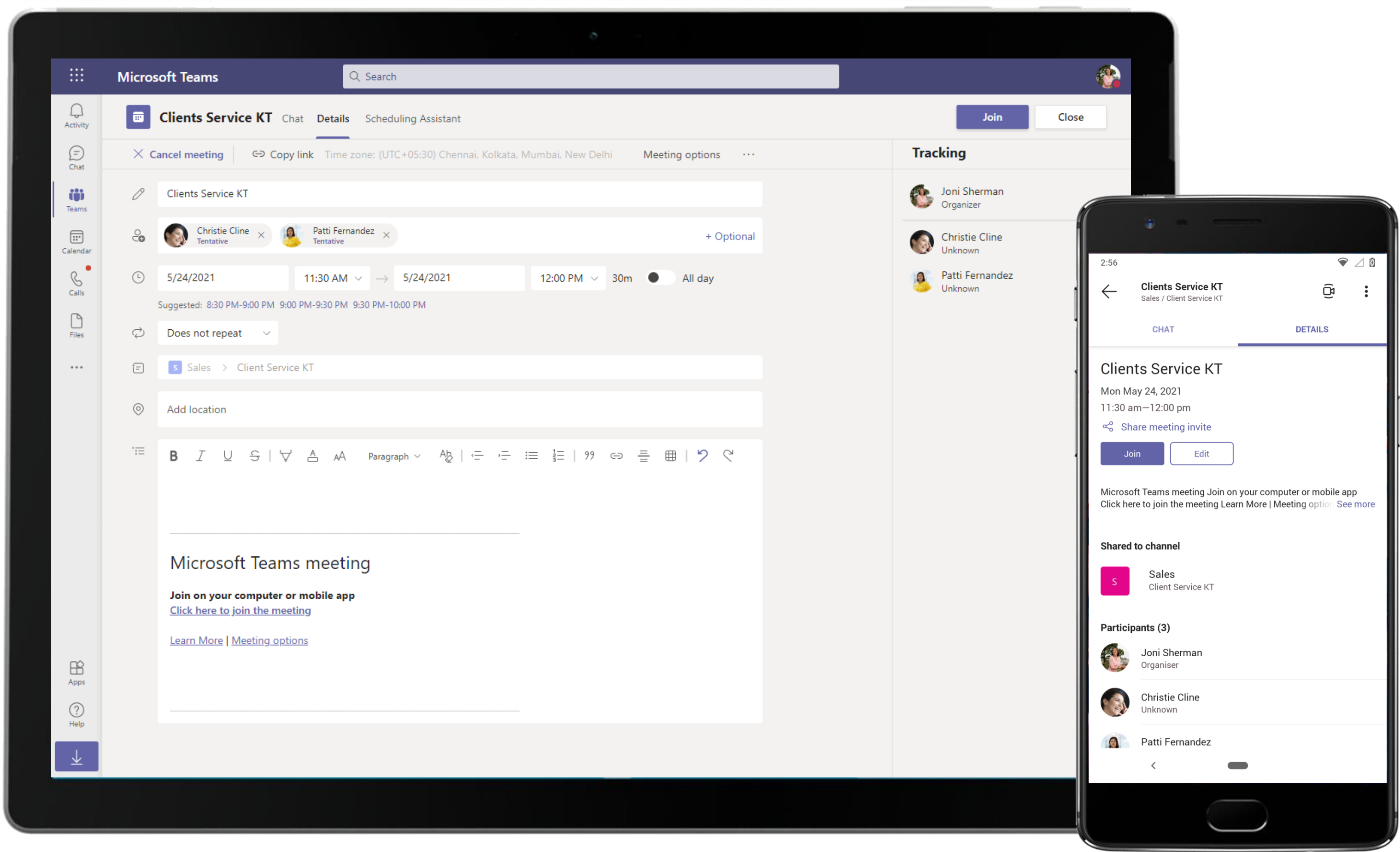
PowerPoint



When a new member is added to a team, they can immediately access all conversations, information and files that have been shared in the team. This makes it easy for a new member to ramp up to the project.



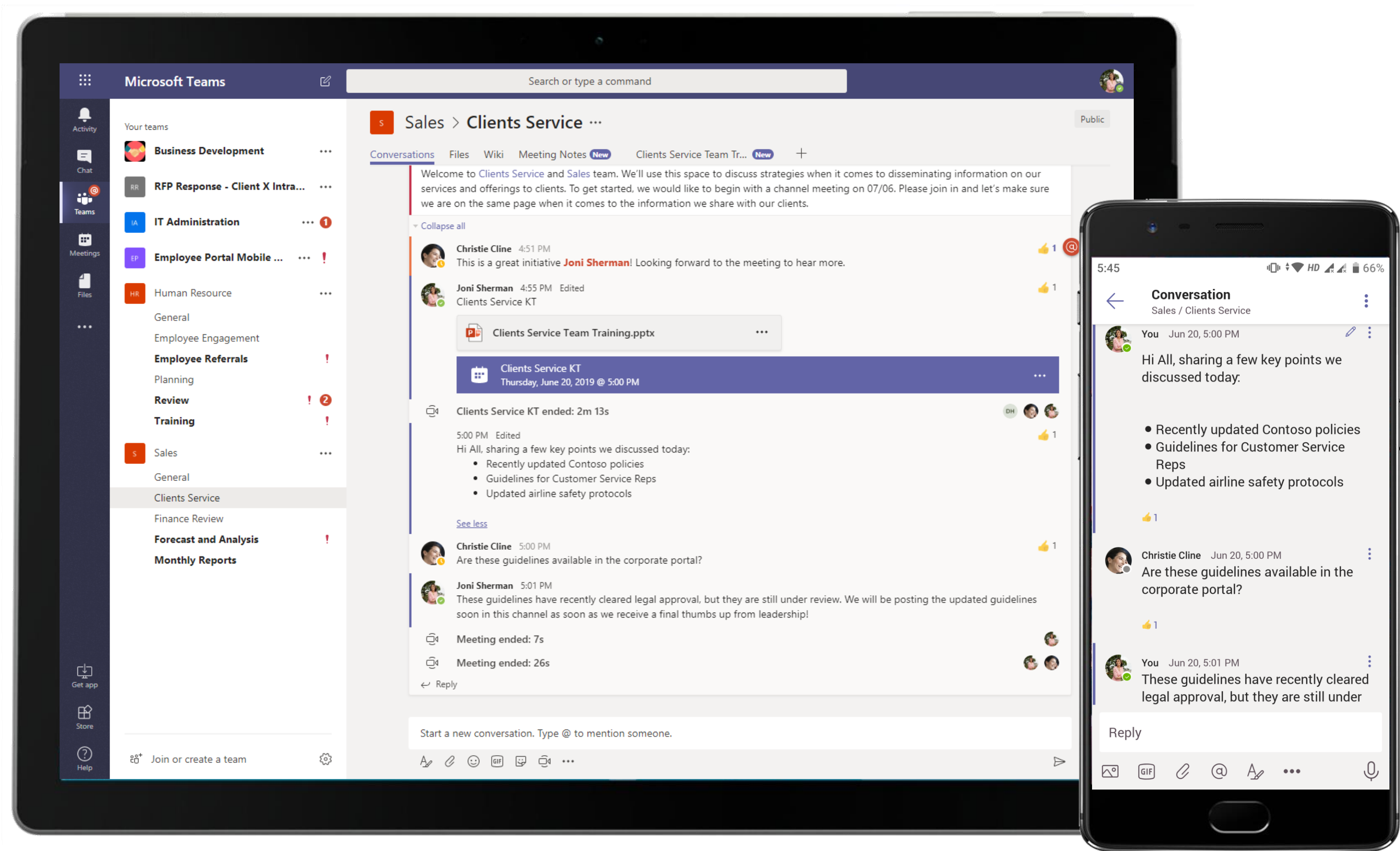
The Sales Manager posts a message in the channel to provide the client service team context about the meeting and the objective behind the collaboration.



A client service knowledge transfer meeting is scheduled with essential participants in the loop. Scheduling a meeting in the channel serves as an open invite for other interested team members to participate and offer inputs.



Create and share PowerPoint presentations over a Teams call to make meetings meaningful and to offer attendees a visual representation of key points covered.



The conversation thread allows the Account Manager to come back to clear her questions and receive a prompt response from the Sales Manager.



Preparing for a Monthly Review

Account Manager

Scenario Walkthrough

Contoso drives sales efforts by constantly analysing results of previous endeavours and tracking sales outcome. Monthly reviews are a part of this process. See how an Account Manager syncs up with the Sales Manager for her monthly review.

- Views a reminder post in the channel regarding monthly review.
- Submits his Excel report in the channel where the information will be stored in the Files tab.
- Join Teams meeting for monthly review with Sales Manager.
- Posts an update on action items in a 1:1 chat conversation.

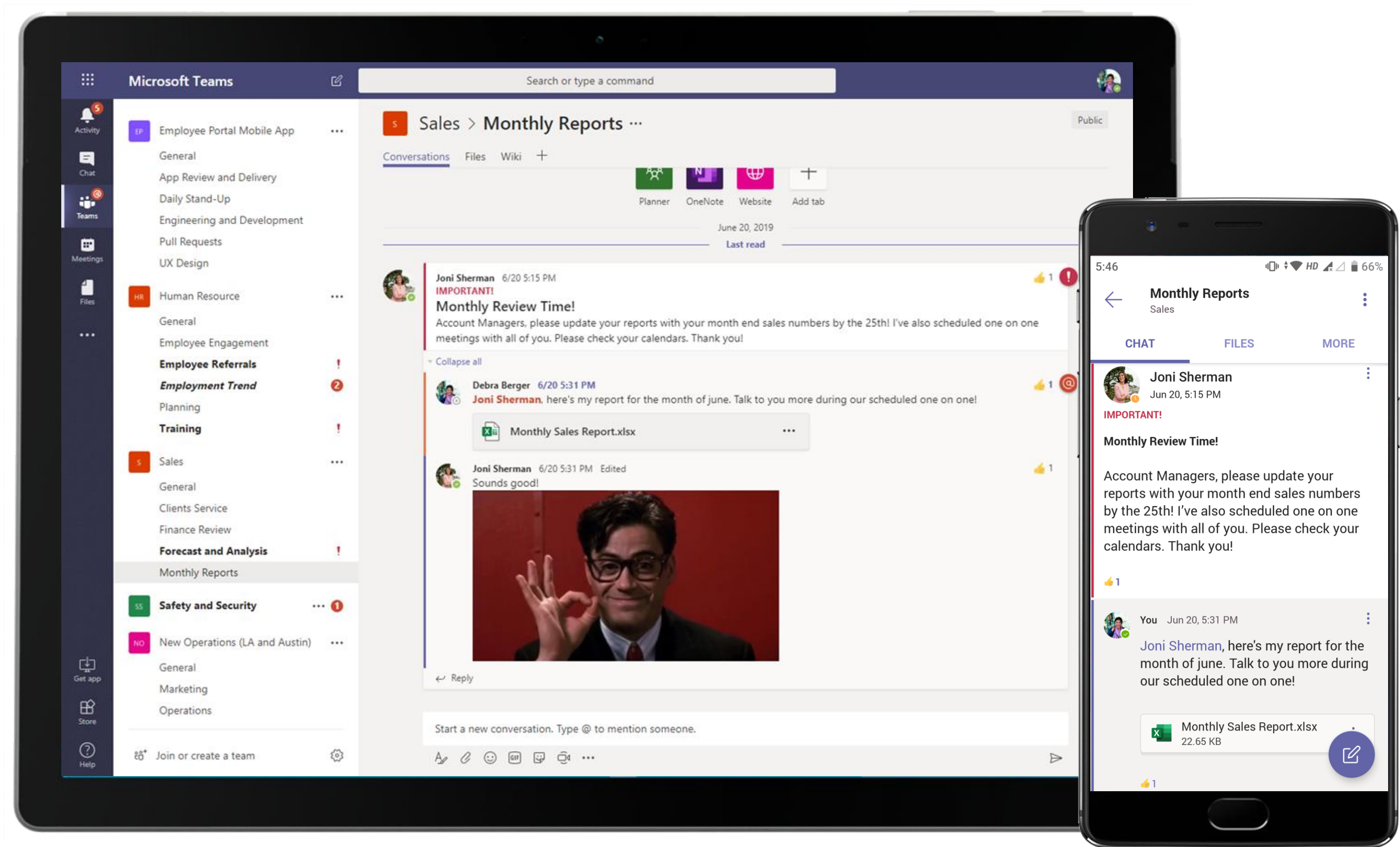
How did Teams help the Account Manager execute her roles and responsibilities?

- Create crisp data summaries with integrated Office 365 tools like Excel.
- Use the meeting thread to continue conversations pertaining to action items, thereby keeping conversations in context.

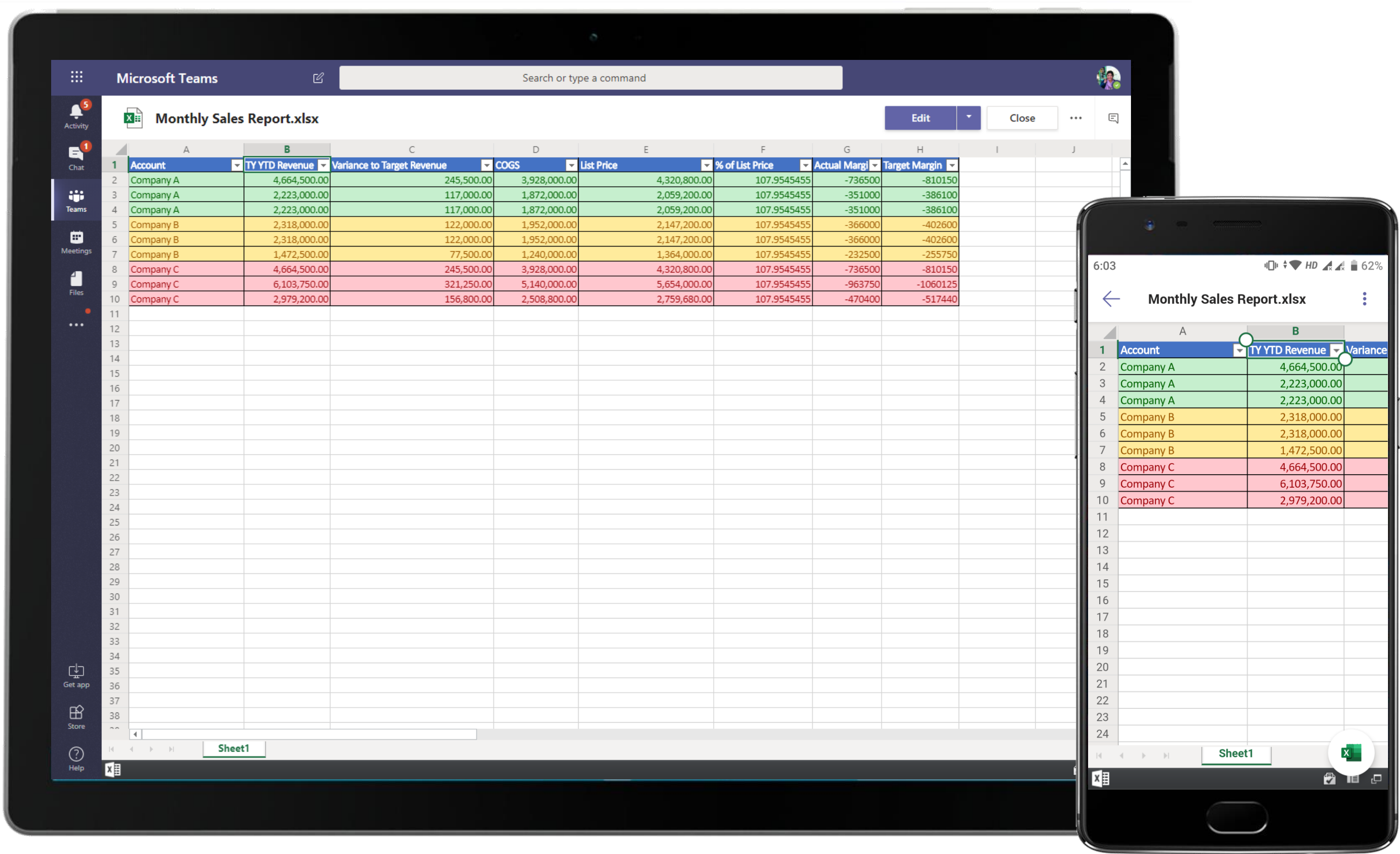
Which app integrations on Teams made it possible?



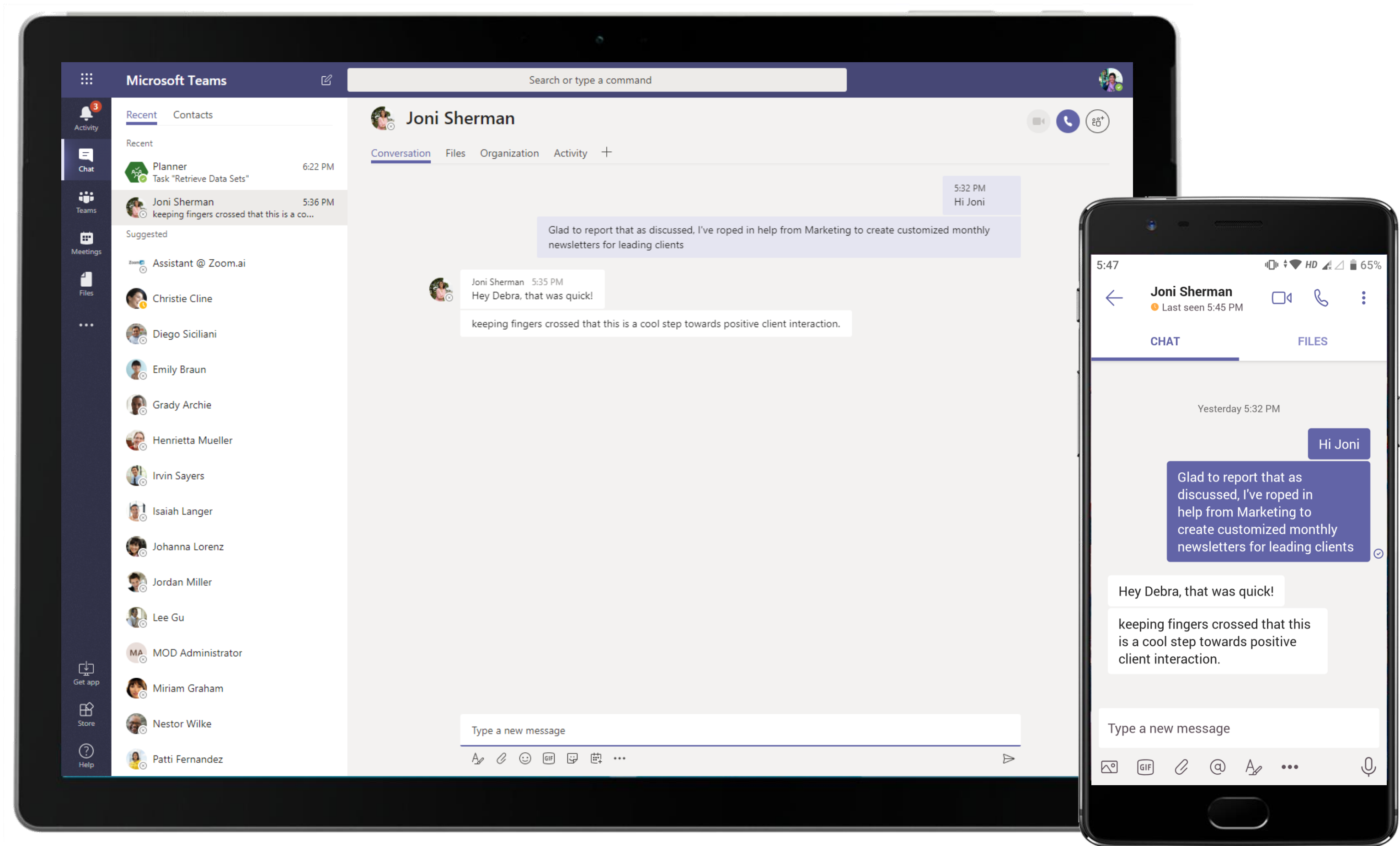
Excel



An exclusive channel for members of a team who collaborate regularly helps maintain a history of past communications to refer to instantly, while keeping the newest conversations and files accessible.



The Account Manager submits her report in the channel using Excel. This spreadsheet is stored in a cloud-enabled repository with Files.



Quickly reach out to and chat with co-workers. Take conversations offline from channels for 1:1 discussions. The Account Manager reaches out to the Sales Manager to provide a quick update over chat after the review meet.



Forecasting Sales and Conducting Gap Analysis

Sales Analyst

Scenario Walkthrough

There are often mismatches between forecasts and predictions and the final outcome. The Sales Analyst has to identify gaps and bridge them to be sure they are not missing business opportunities.

- Creates a channel for the purpose within the sales team and sends a welcome message highlighting the purpose of the team.
- Sends out a meeting invite to discuss forecasts, actual outcome and competitor strategies.
- Uses monday.com to assign tasks to team members to work on gap analysis.
- Team members use a shared Excel to build out the gap analysis and use PowerPoint for ease of data consumption.
- Reviews the report in PowerPoint and requests changes.
- Reviews final draft and passes it on to the leadership team.

How did Teams help the Sales Analyst execute her roles and responsibilities?

- Build reports, documents and presentations online in the cloud with Excel and PowerPoint.
- Channel meetings and conversation keep discussions in context with key players.
- Edit reports and work cohesively as a Team to build reports without leaving the conversations and discussions in Teams.
- Organize, structure, and streamline all programs, projects, and processes with monday.com.

Which app integrations on Teams made it possible?



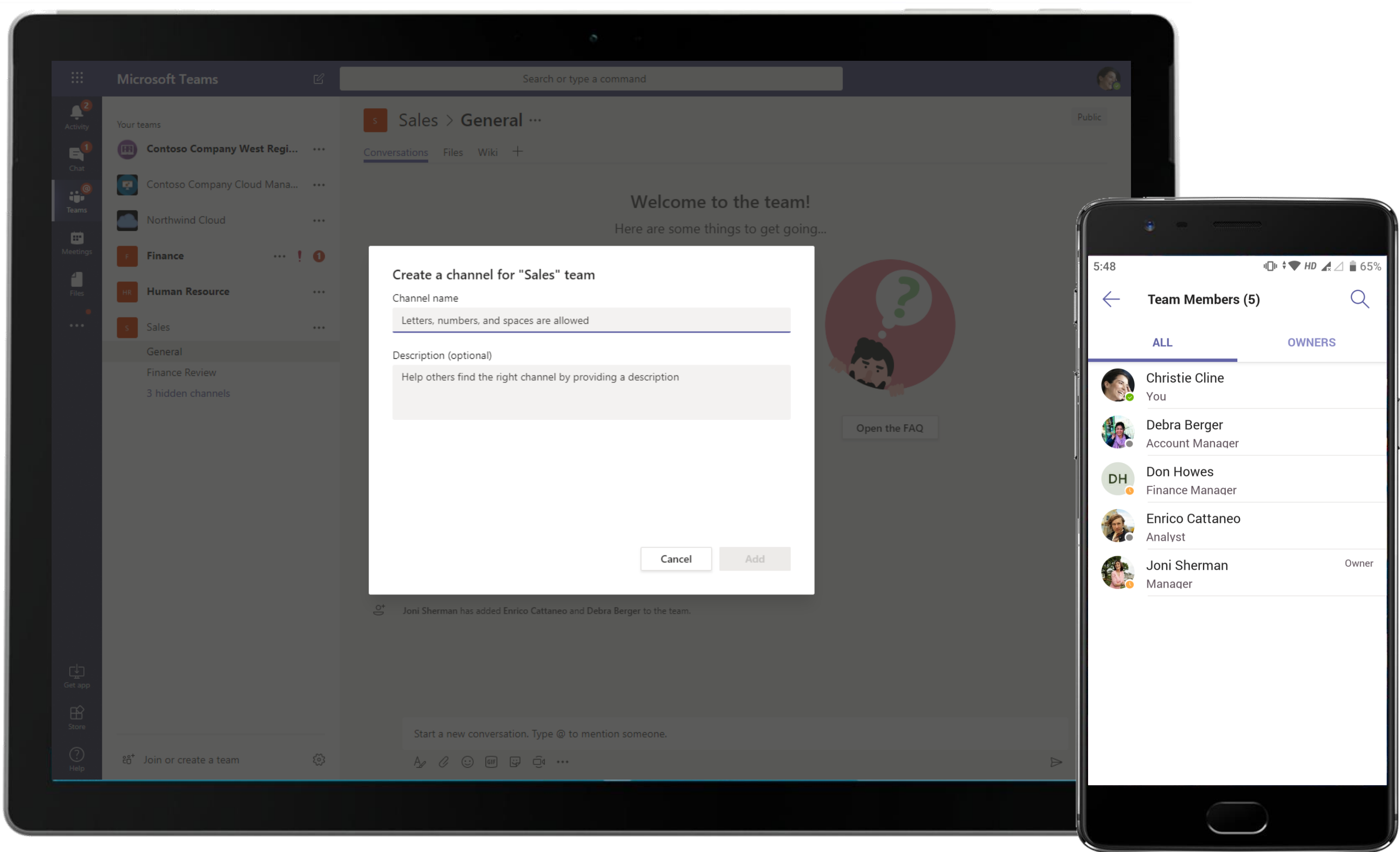
Excel



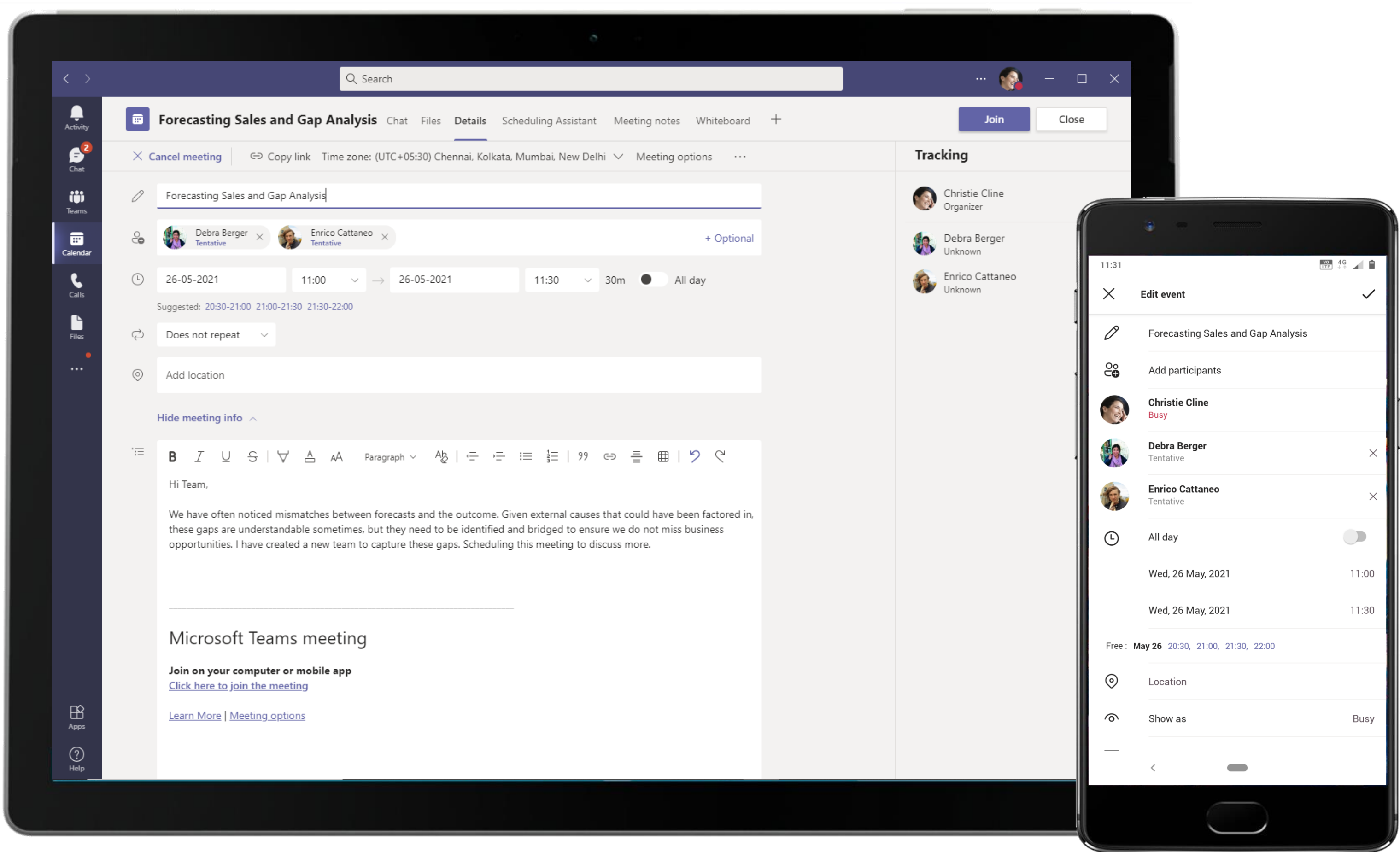
PowerPoint



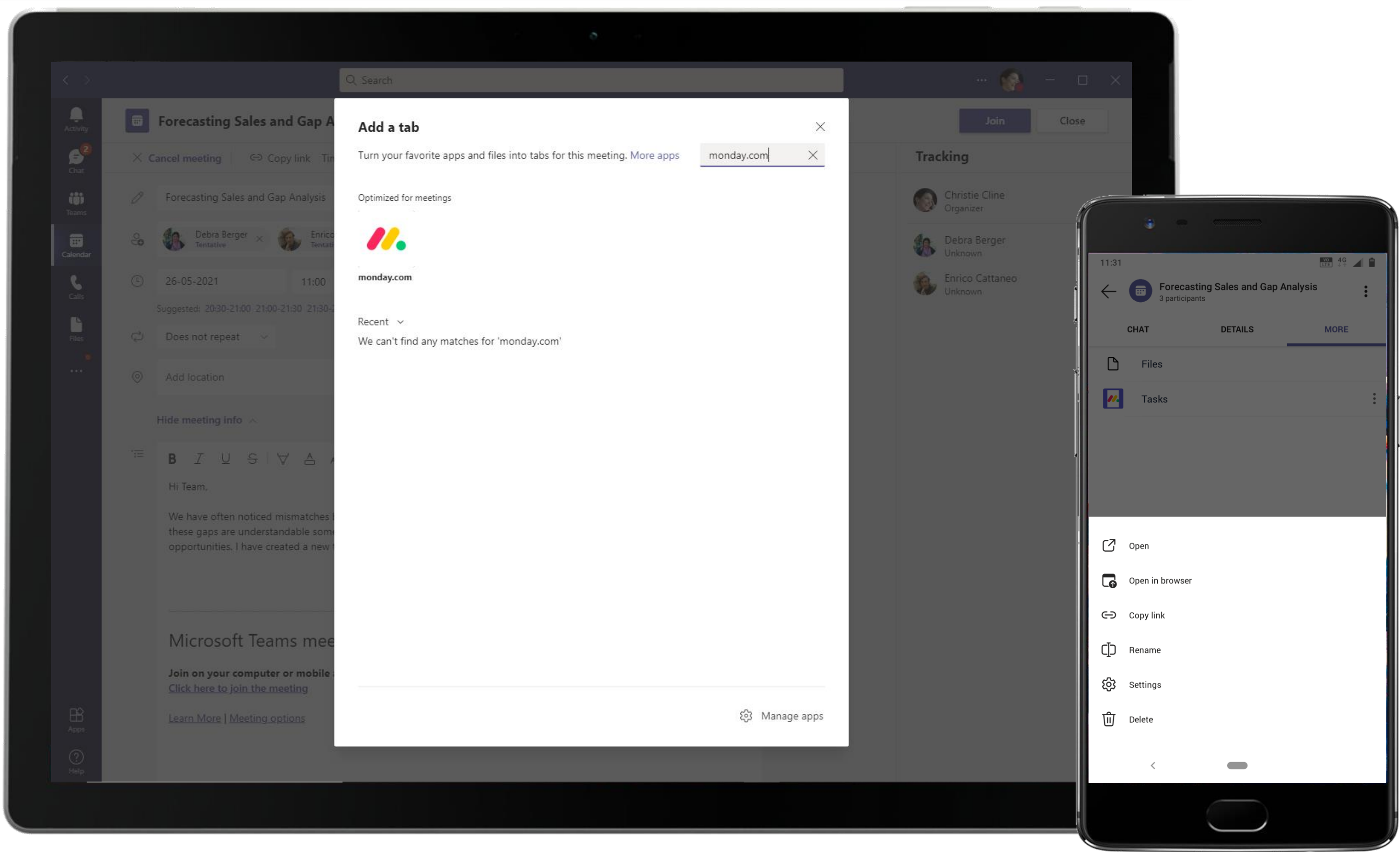
monday.com



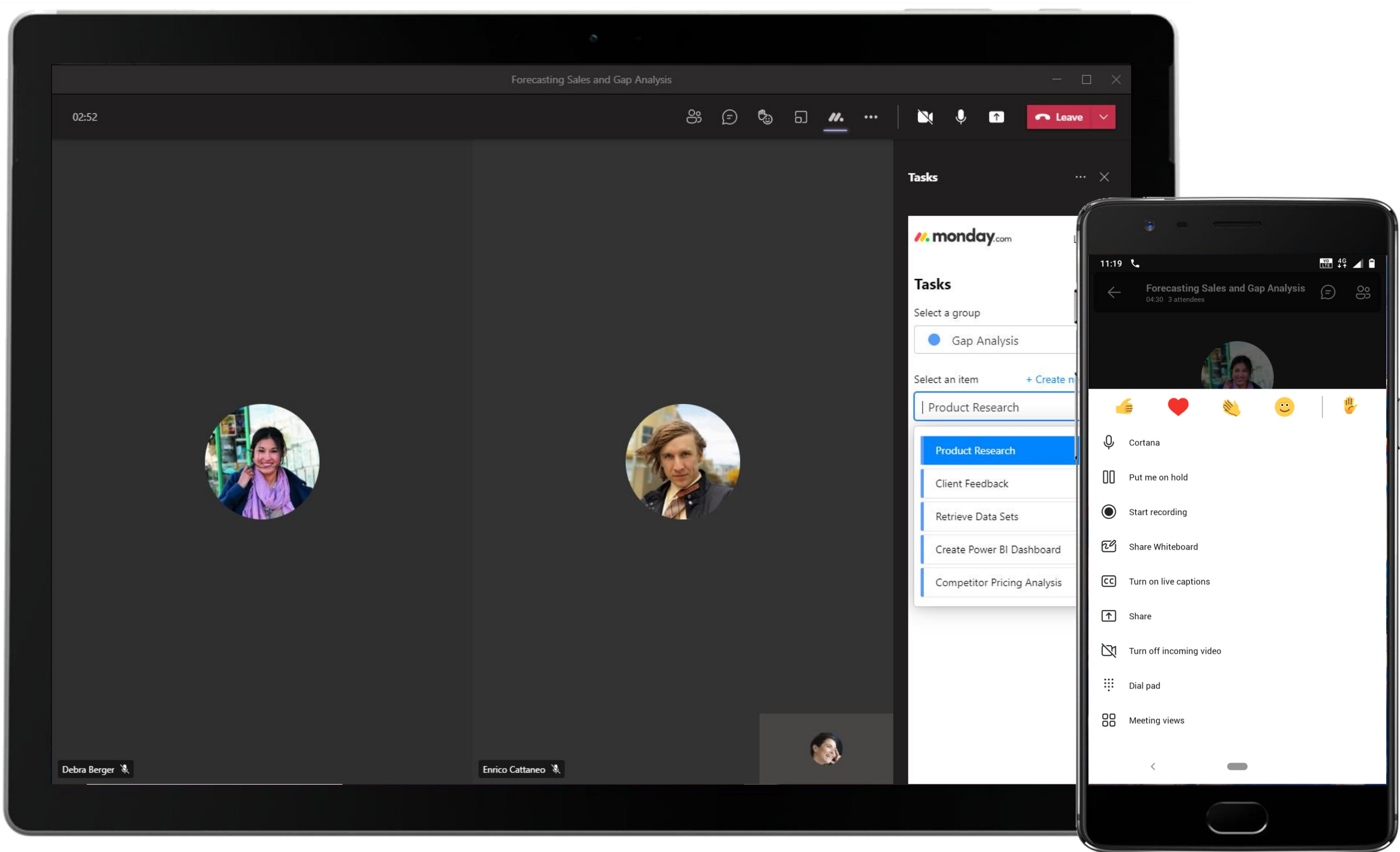
Teams and channels are where you hold meetings, have conversations and work on files together with team members. Each channel is built around a topic, like "Monthly Reports," a department name, or even just for fun chatter.



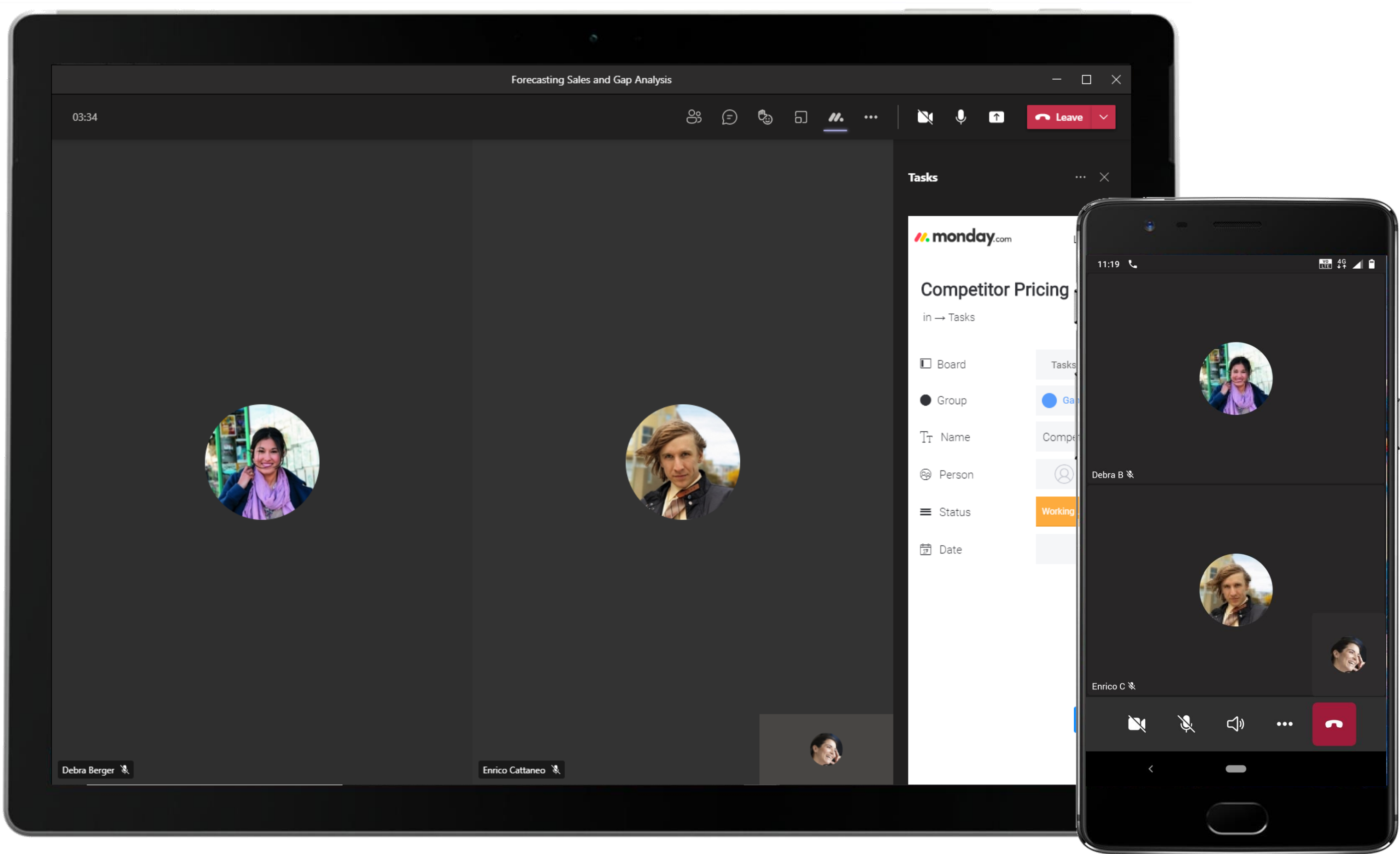
The Sales Analyst sends a welcome message highlighting the purpose of the team and a fellow team member creates a meeting invite along with an agenda.



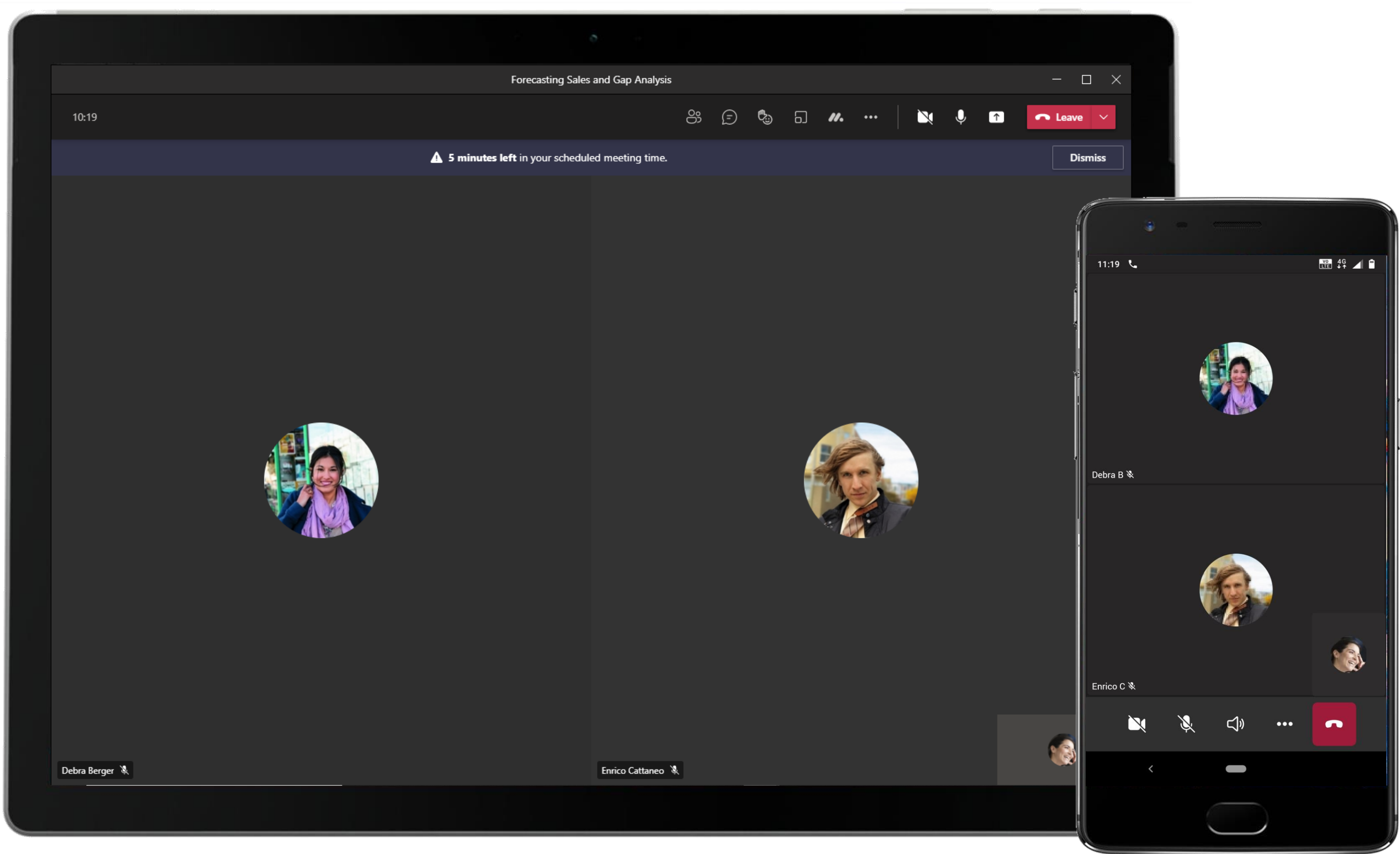
Use tabs to configure relevant apps for your meeting. The Sales Analyst configures monday.com in a meeting to create, assign, track and discuss tasks during the meeting.



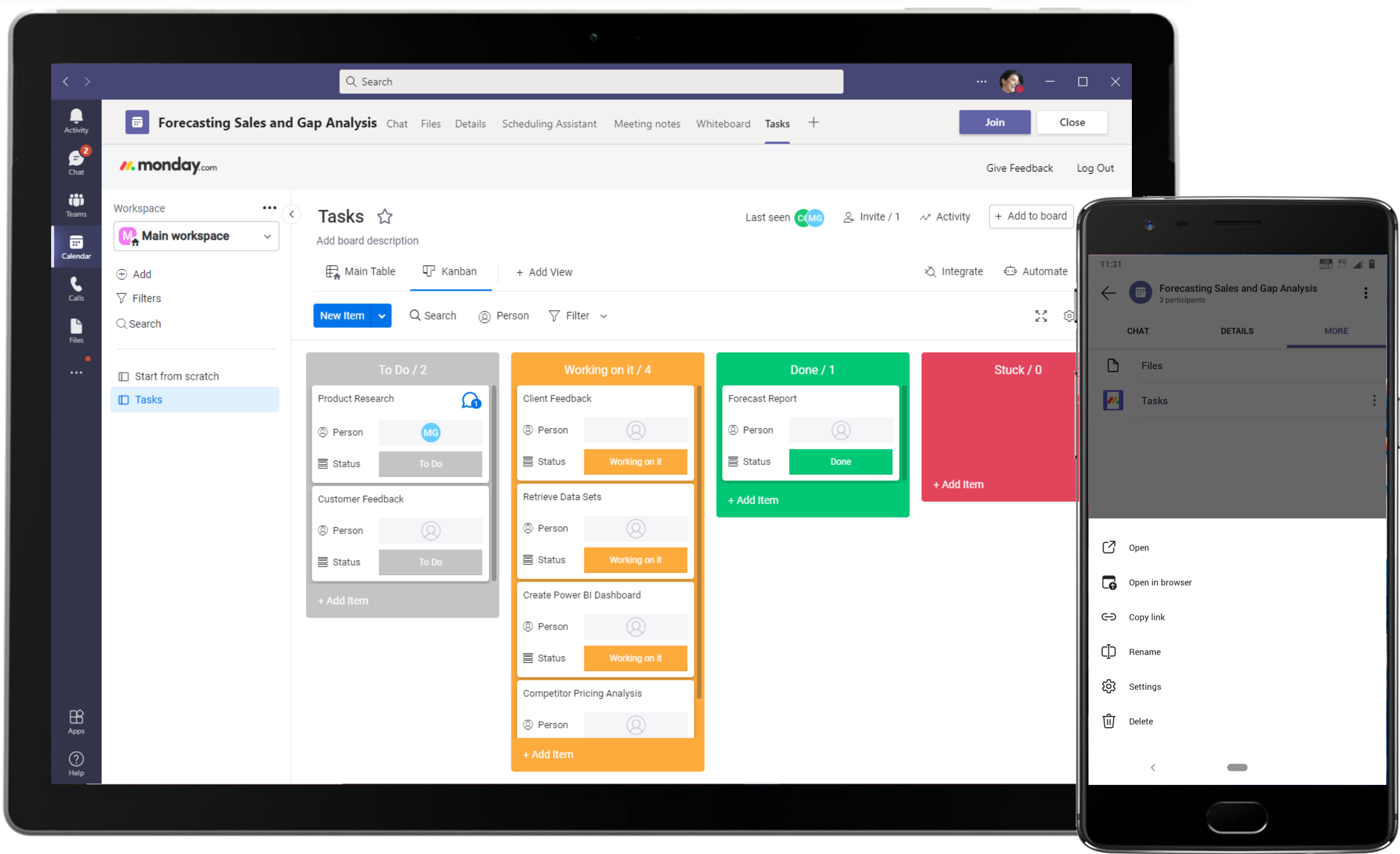
Leverage project management capabilities to track work items and clear blockers seamlessly in meetings. monday.com offers a wide range of project management capabilities – discuss task status and make quick updates to status and timeline within the meeting context for efficient project management.



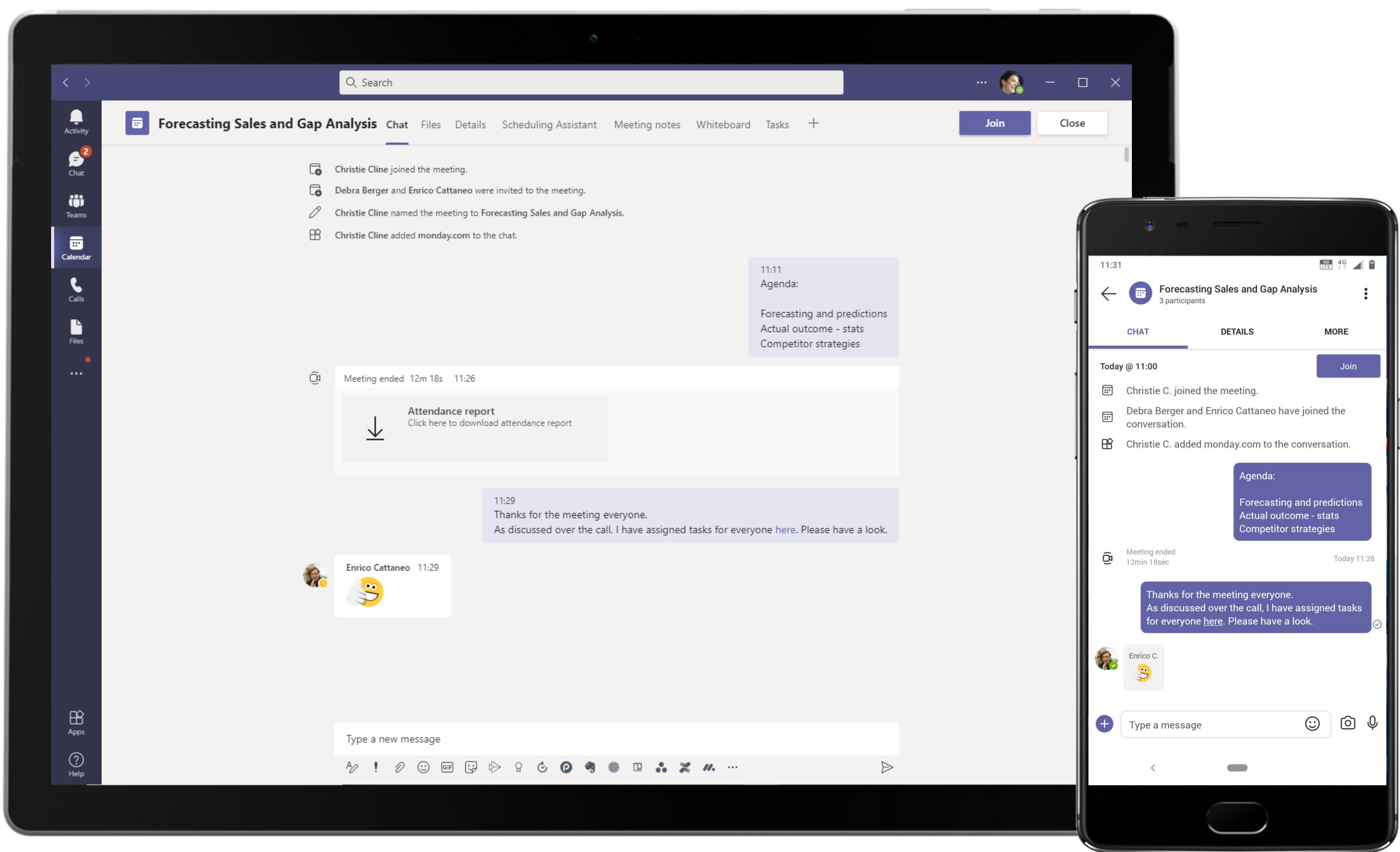
monday.com in meetings makes it easy for meeting participants to create tasks, discuss them, track progress, and more without leaving the meeting interface. This makes it easy for the meeting participants to maintain context during discussions.



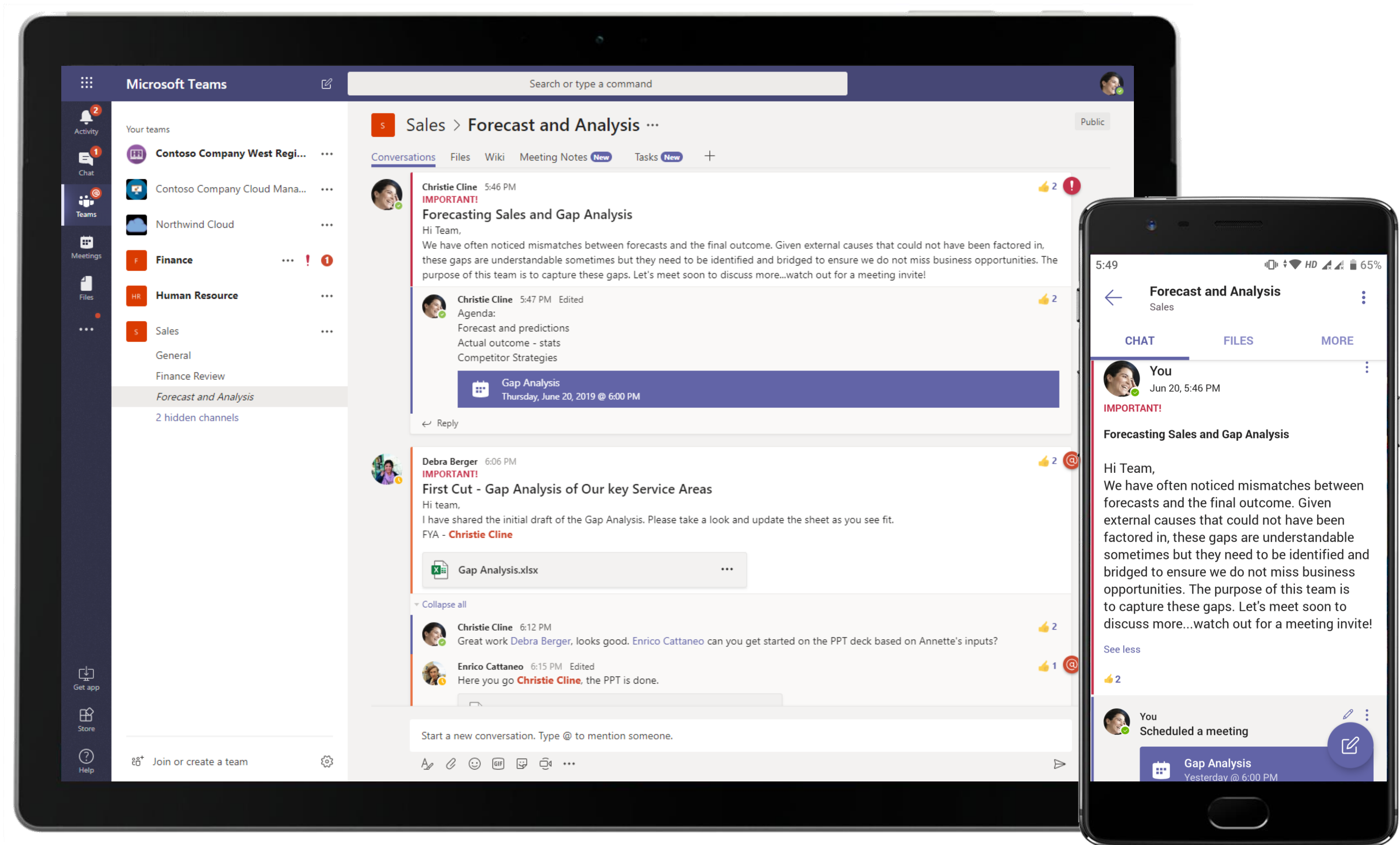
Microsoft Teams sends notifications to all participants five minutes before the meeting is scheduled to end. This helps everyone stay cognizant of the time left in the meeting.



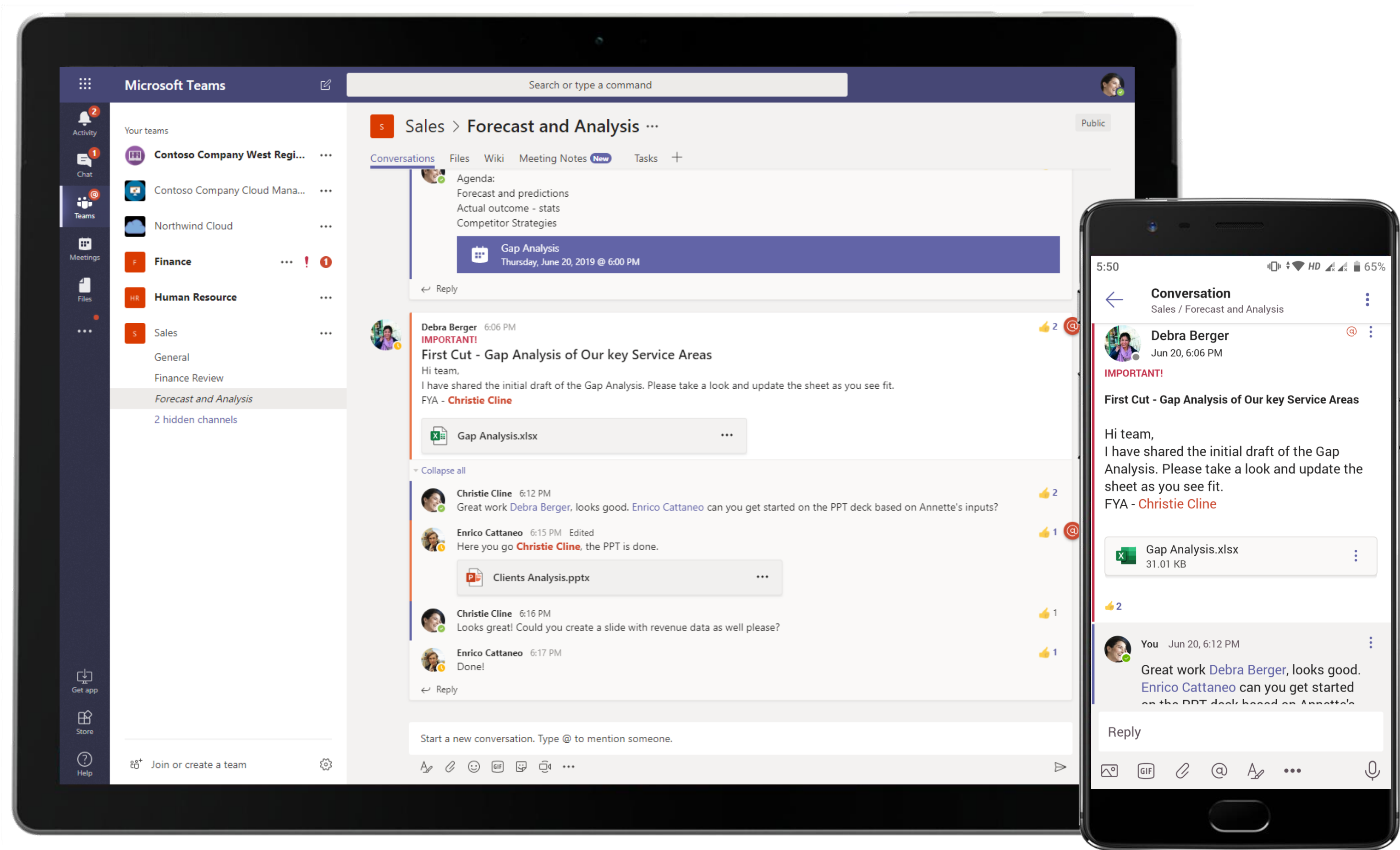
Create a new monday.com board or add to an existing one from directly within Microsoft Teams and easily visualize your team’s work in one collaborative workspace.



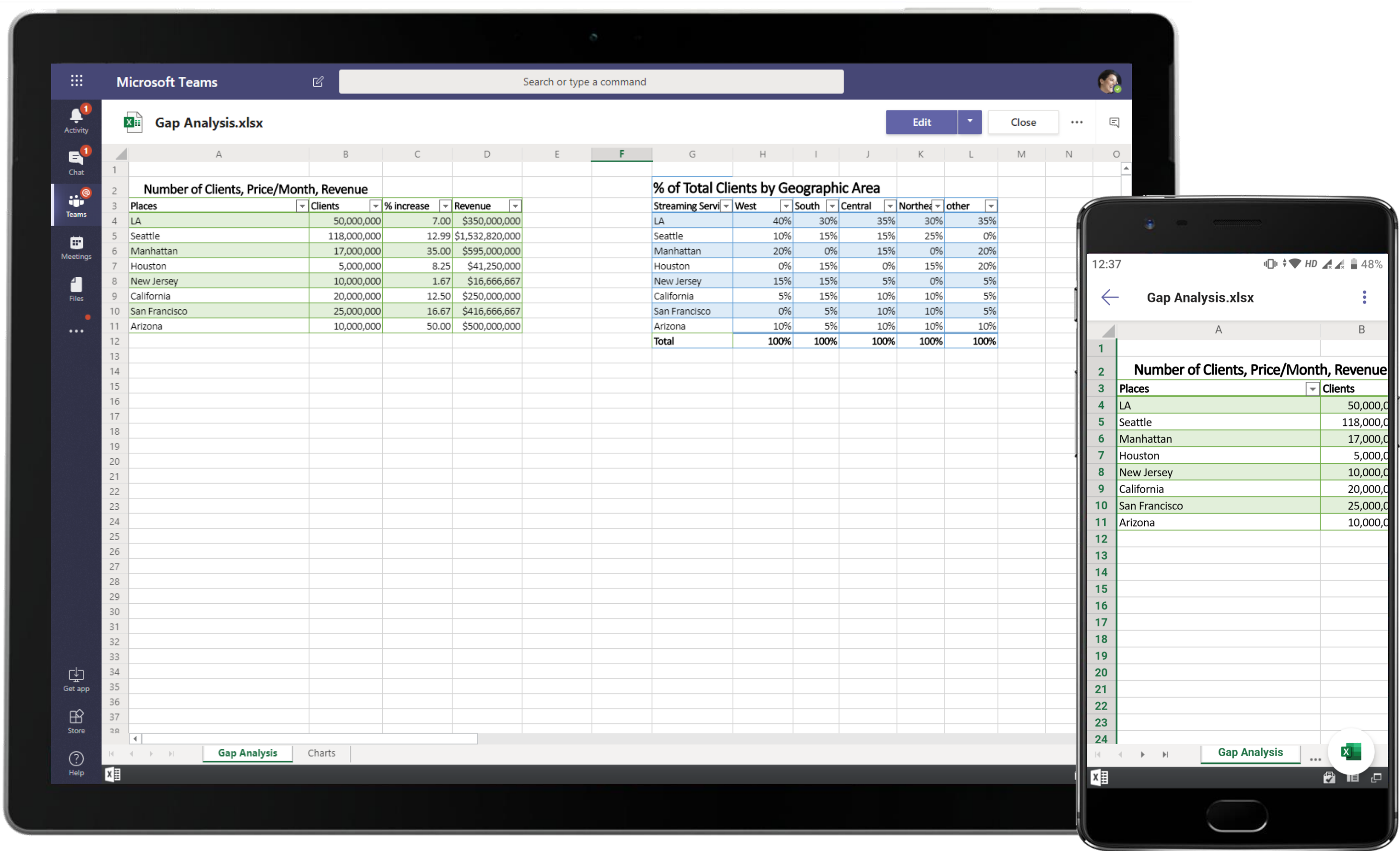
Meeting chat allows conversations before and after the meeting. Documents shared are stored in protected environment and can be accessed by everyone in the channel.



Channel conversations allow users to build discussion threads after a meeting, also allowing them to share data as the team members do in this case.



Relying on channel conversations to work with each other, team members quickly rally together and use a shared Excel to build out a gap analysis and use PowerPoint for an easily consumable, but effective presentation.



Use Excel's analytical abilities within Teams to build reports and share them with your team. The full canvas of Excel is available as a rich, integrated experience inside Teams enabling the sales team to review, edit and publish reports.



Identifying and Closing a Major Sales Opportunity

Sales Manager

Scenario Walkthrough

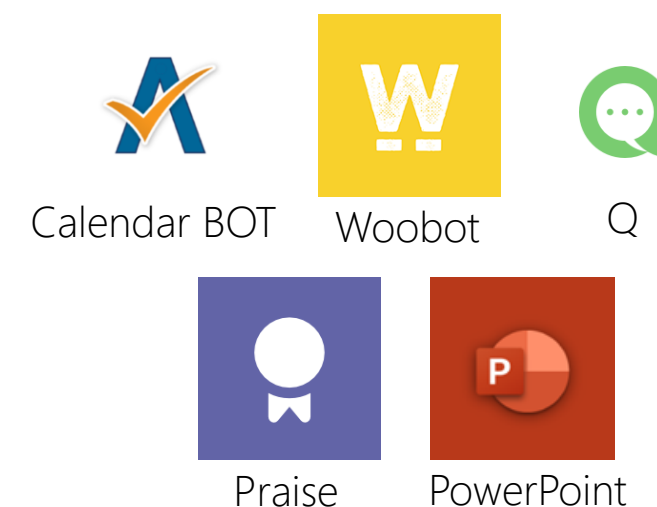
The Sales Manager at Fabrikam AI always keeps himself up-to-date with the latest news across industries and potentials sales opportunities. He learns that Contoso, an existing client, is exploring opportunities to digitize their workflow and identifies this as a potential sales opportunity. He notifies other team members of this lead, reaches out to a representative from Contoso, and kickstarts the process to pitch Fabrikam's value-adding chatbot services to Contoso and close the deal, all within Microsoft Teams.

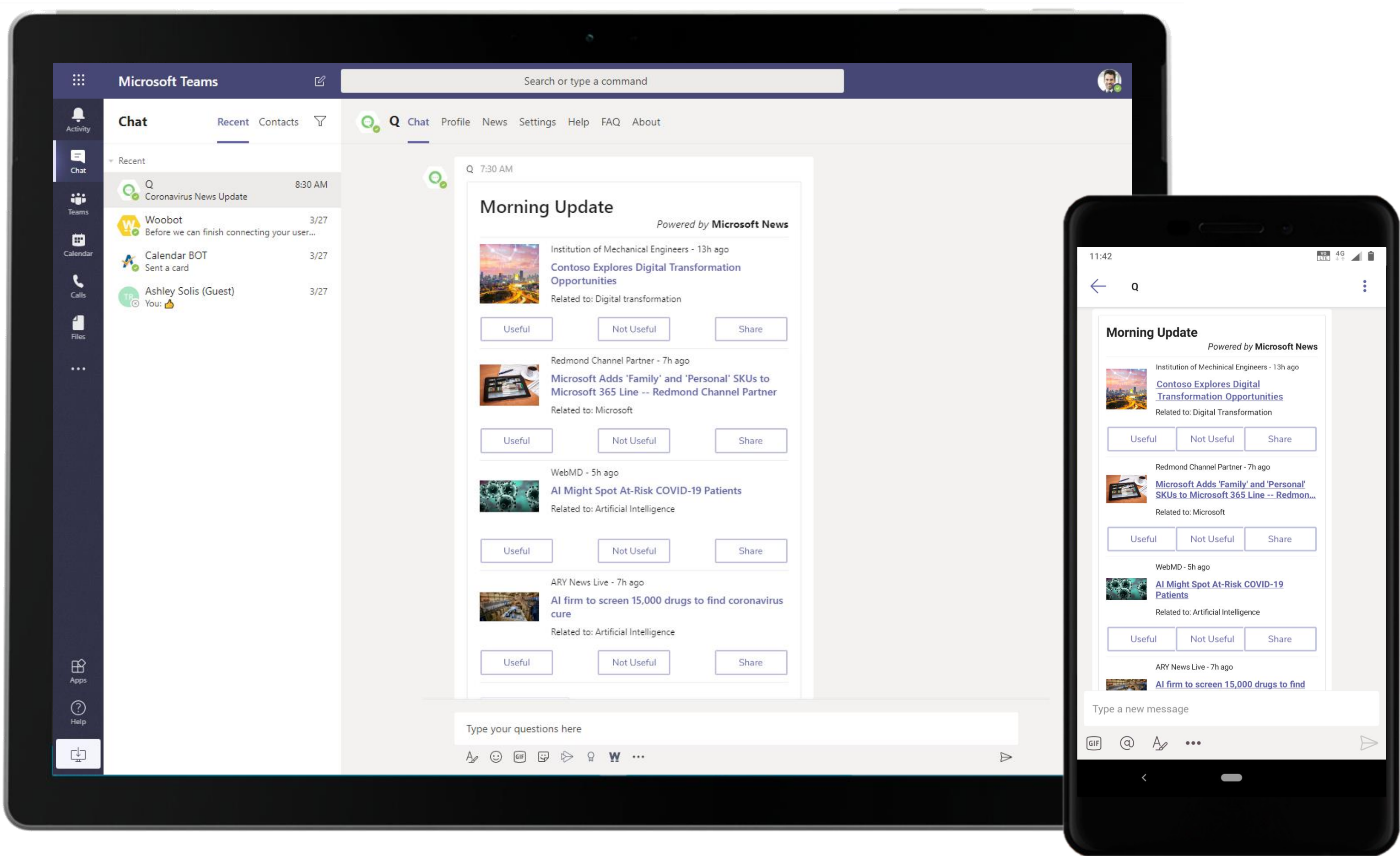
- Receives a news update regarding Contoso's effort to transform their workflow via Module Q digitally.
- Schedules a meeting and discusses potential chatbot solutions that Fabrikam AI could pitch to Contoso.
- Reaches out to a representative from Contoso who expresses interest in the services via 1:1 chat.
- Checks the client's calendar and the calendar of other team members to schedule a meeting at a convenient time using the Calendar BOT.
- Receives a pitch deck with details of the services that Fabrikam offers and the pricing of the services via PowerPoint.
- Updates the status of the lead to 'Closed' and notifies team members using Woobot.

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

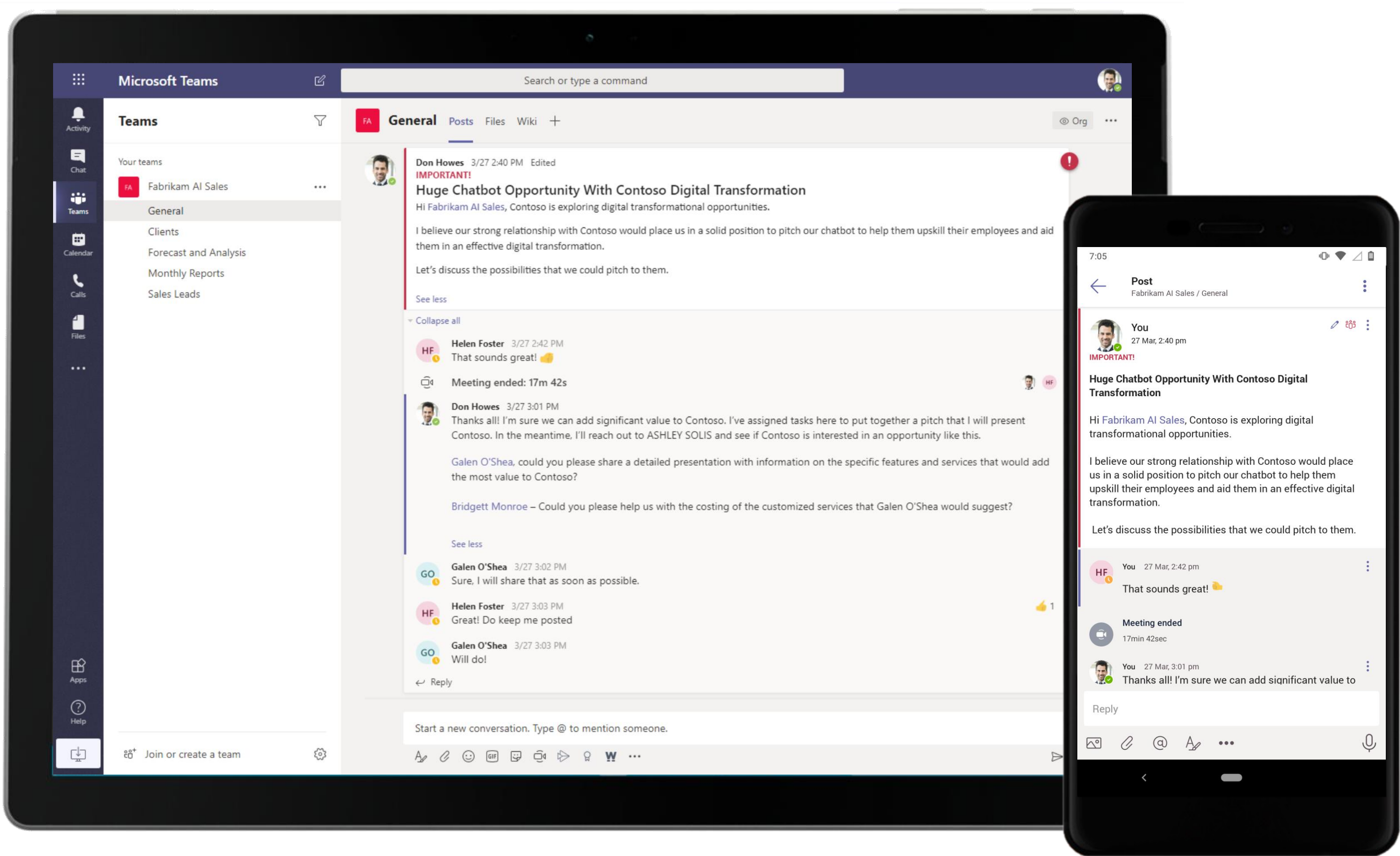
- View, search and act on new leads, forecast with precision, and nurture important opportunities from creation to close using Woobot.
- Stay up-to-date across topics right within Microsoft Teams using Module Q.
- Check the schedule and block the calendar of team members within your organization and from the customers side using Calendar BOT.

Which app integrations on Teams made it possible?

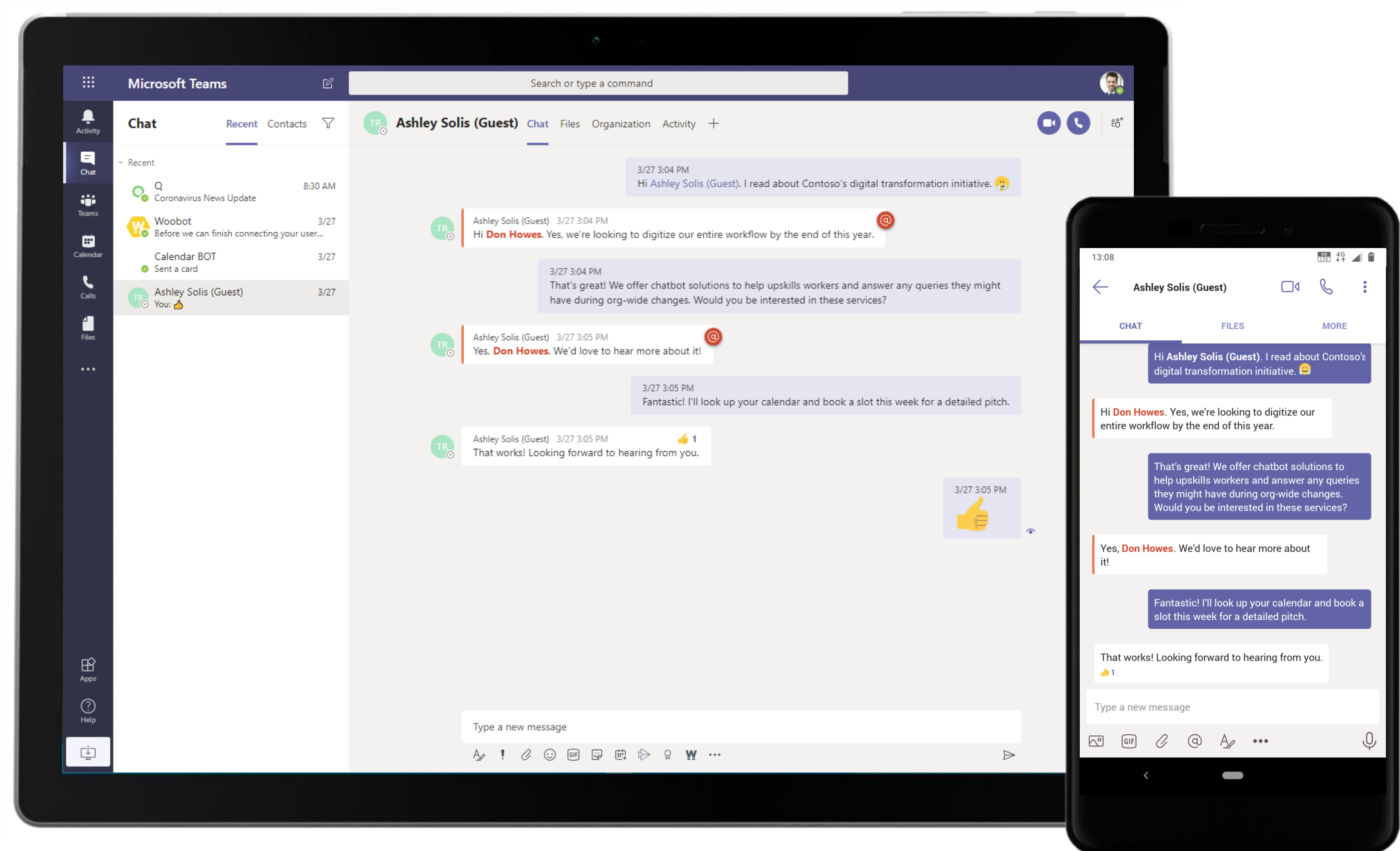




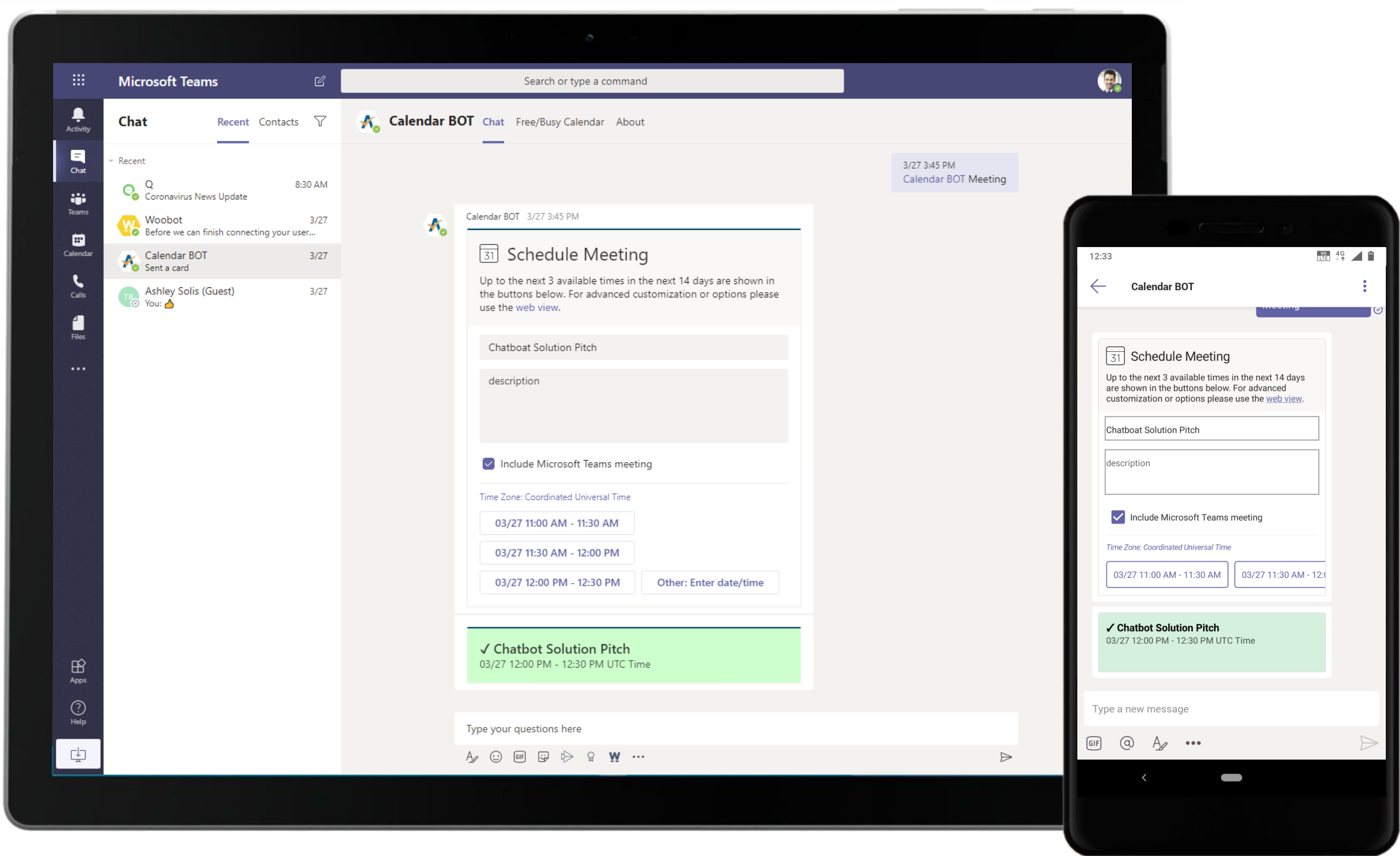
Model Q finds content relevant to your current priorities by scouring external and internal content sources, such as news, collateral, and experts. The Q bot delivers what you need in your chat feed.



The Sales Manager kicks off discussion over an opportunity and triggers an instant meeting using Meet Now feature. The team keeps conversations and relevant documents all in the meeting thread for easy reference.



The Sales Manager reaches out to a Contoso representative using 1:1 chat. Use this feature when you don't need the whole team.

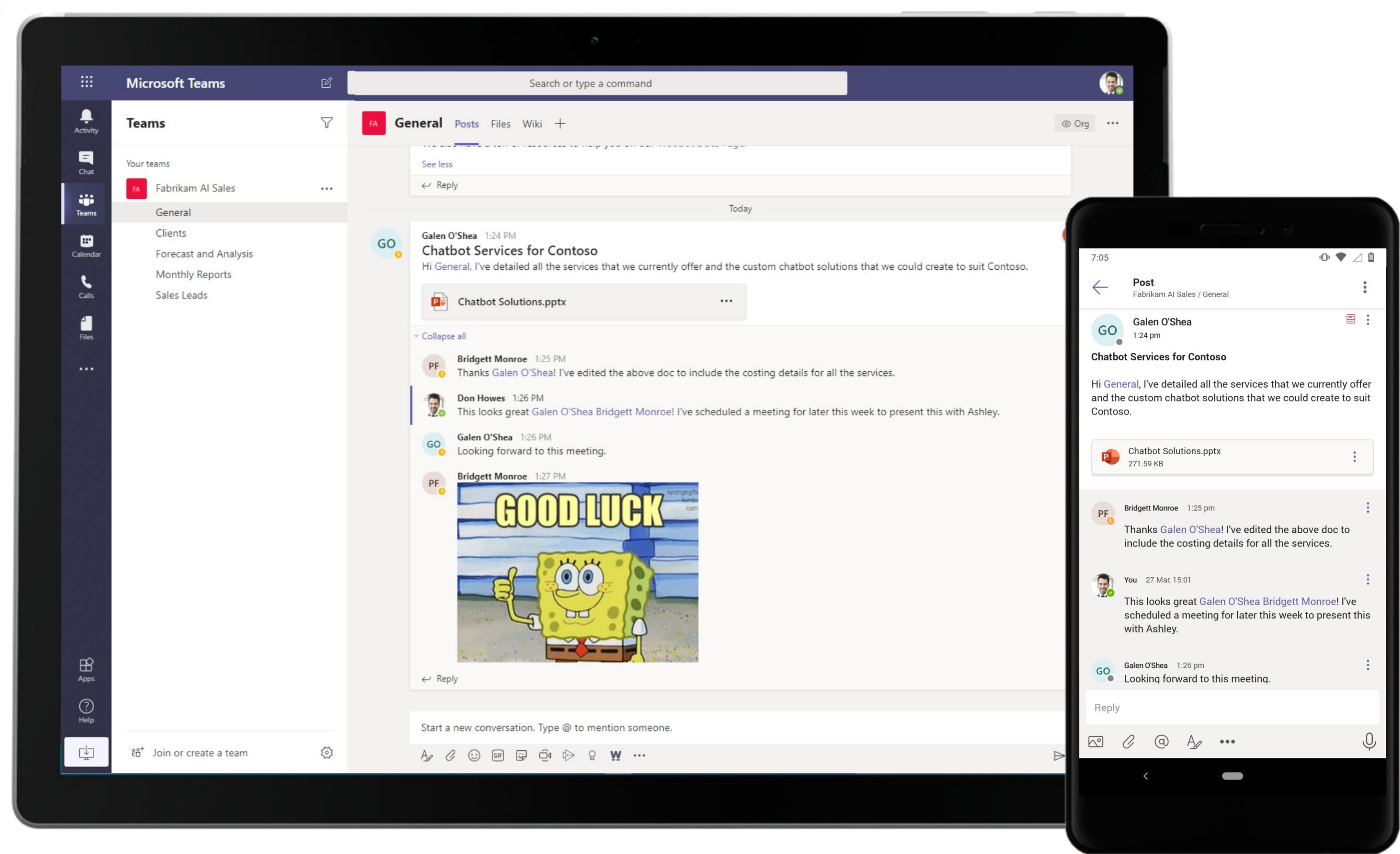


Compare open times on your calendar to open times on any of your Approved Contact's calendars using Calendar bot. The Sales Manager uses the bot to schedule meeting with Contoso representative.

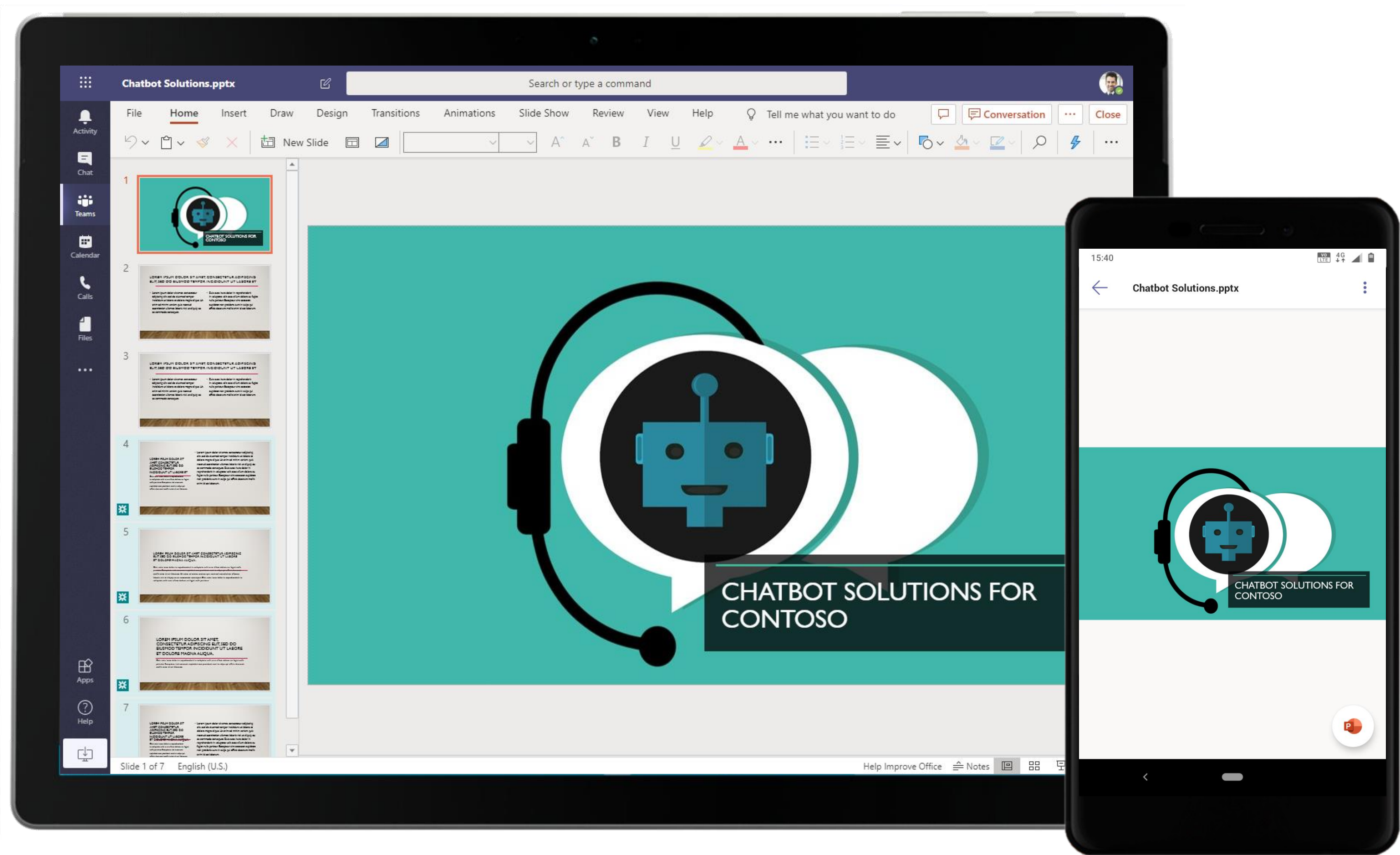
The screenshot displays the Microsoft Teams interface on a tablet and a smartphone. The tablet screen shows the 'Sales Leads' channel with a post from 'Woobot' at 10:56 AM. The post is titled 'Megan Bowen shared Opportunity record' and includes a 'Chatbot Solution' table. The table lists details for a sales opportunity: Name (Chatbot Solution), Amount (\$100,000.00), Probability (80%), Owner (megan bowen), Next Step, Account (Contoso), Stage (Meeting Scheduled), and Close Date (Apr 03 2020). Below the table is a 'More...' button. The post also includes a message from Don Howes at 10:20 AM and a photo of a group of people with the text 'WE GOT THIS!'. The smartphone overlay shows the mobile view of the same post, with the table and message details visible.

Name	Amount	Probability	Owner	Next Step	Account	Stage	Close Date
Chatbot Solution	\$100,000.00	80%	megan bowen		Contoso	Meeting Scheduled	Apr 03 2020

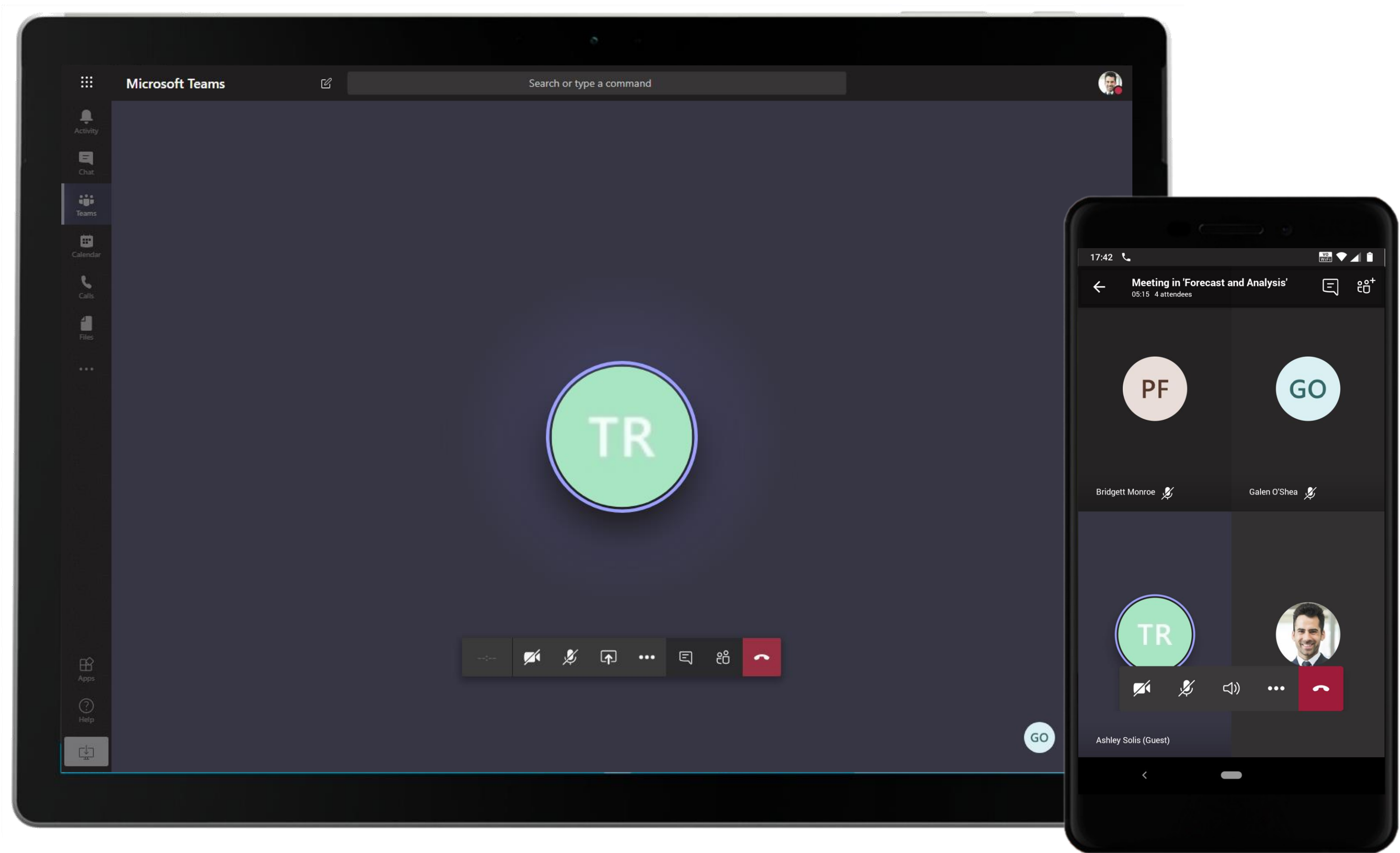
Access critical Salesforce CRM data in real-time and keep your team updated of important sales developments with Woobot. The Sales manager uses Woobot to update the lead status and notify the team of the meeting scheduled.



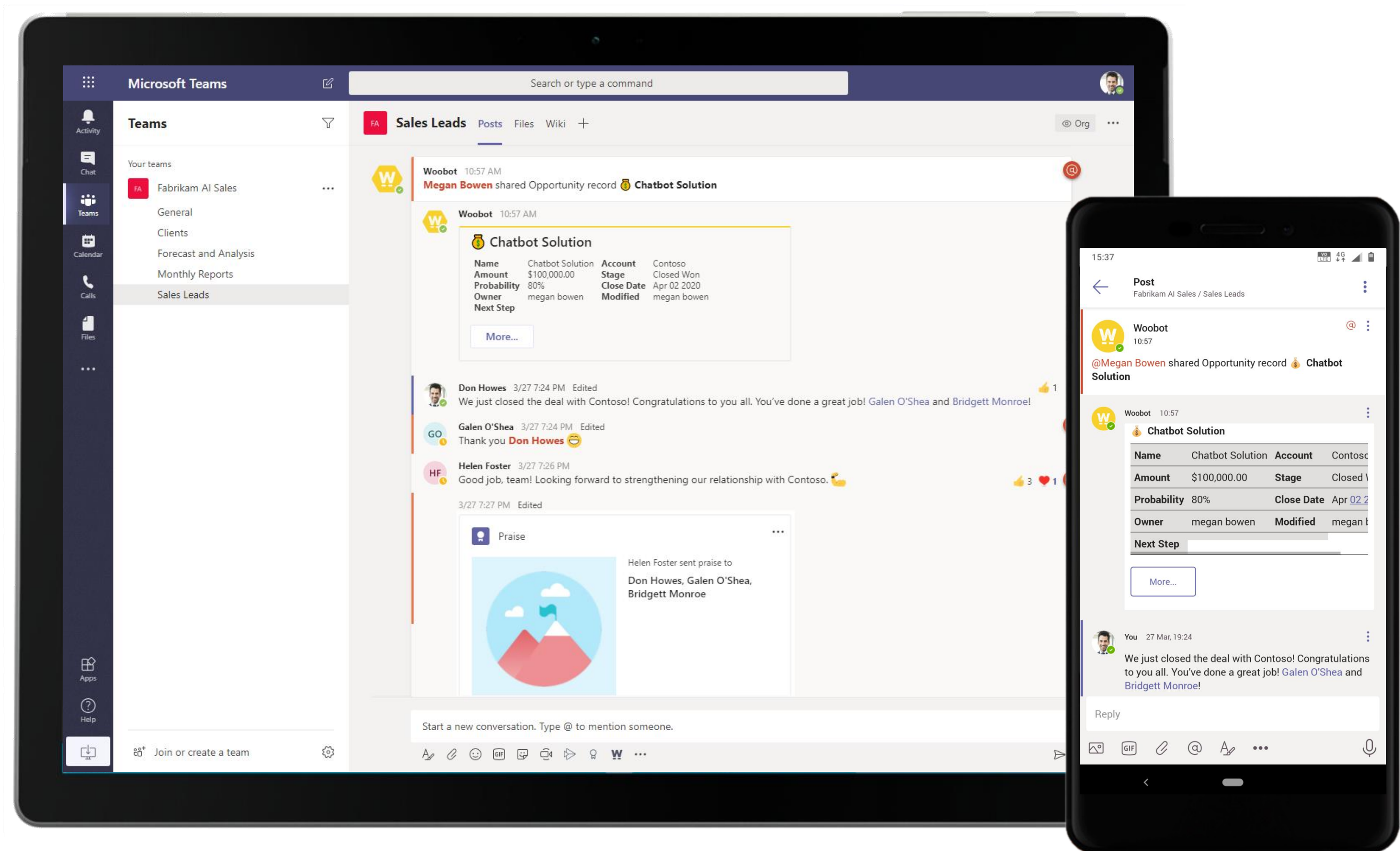
Channel conversations are a great way to track the status of a project as they can contain everything related to the project: discussion threads, files, and meeting notes. A PowerPoint presentation is shared to elaborate on solutions for Contoso.



Store and share important files within a secure, cloud-enabled repository with Files. Informative documents such as the PowerPoint discussing chatbot solutions are housed here for the team's easy access.



During a meeting, the participants can use rich meeting capabilities such as video, screen sharing, file sharing, meeting notes and chat to make the meeting engaging and productive. Needless to say, meetings are fully supported on mobile clients too!



With Woobot, you can forecast with precision, and nurture important opportunities from creation to close in any team. The Sales Manager uses Woobot to update the team of winning and closing the sales opportunity.



Marketing

Check out how different marketing personas in your organization ranging from Marketing Manager to Social Media expert can boost daily productivity using Microsoft Teams.

Marketing Superpowers in Teams

Capabilities and Features used...

- Protected, shared spaces for conversation and business deals
- Hold remote presentations over protected video conferences
- Open channel communication with Microsoft Teams
- Build reports, documents and presentations online with office applications
- Schedule meetings through synced calendars

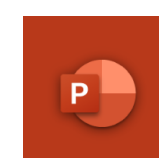
Apps that enable an immersive experience in Teams



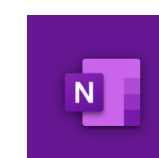
Word



Excel



PowerPoint



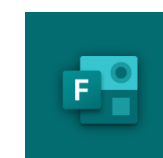
OneNote



Asana



monday.com



Forms



Power BI



Lucidchart



Trello



Shifts



MURAL



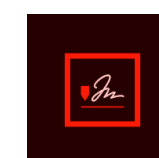
Smartsheet



Presentations
AI



Teamwork



Adobe
Sign



Tasks by
Planner
and To Do



Communities

Meet the Business Decision Makers

Marketing



Marketing Manager

"Marketing has found its digital niche. To play in this field, I need to be quick and responsive. So does my team."

- Execute branding activities and marketing communication
- Manage relationship with media and PR agencies
- Oversee the loyalty program's reach and performance for the organization



Marketing Project Lead

"Data is scattered – sometimes in spreadsheets, sometimes in people's heads. Teams makes it easier to tap into numerous sources."

- Create and utilize required documents, business plans and launch plans for the business
- Suggest approaches to marketing and sales in order to drive growth
- Generate business cases for service extensions and enhancements



Marketing Analyst

"Marketing without data is like driving with your eyes closed."

- Gather data about consumers, competitors and market conditions
- Analyse data using statistical software
- Prepare reports and present results to clients as well as to the management



Extending Services in New Markets

Marketing Manager

Scenario Walkthrough

Contoso's award-winning professional services have a constant demand in new markets. To cater to these clients, Contoso is in the process of extending their services and setting up offices in two new, major cities. The marketing team must work together on a plan of action to make their services in these new markets a success. Here's how a Marketing Manager leverages the cohesive experience in Microsoft Teams to streamline her work and ensure visibility for her team.

- Creates a new team and invites team members to brainstorm and collaborate.
- Uses Excel to create marketing plans and uploads the spreadsheets to the Files tab in the channel for peer review.
- Schedules a conference call with Contoso's marketing and finance executives.
- Uses the OneNote app within Teams to capture meeting notes and feedback, without having to leave the Teams application.
- Delegates tasks to team members through clear channel communication.
- Uses a Tasks by Planner and To Do tab integrated in the channel to create, assign and track tasks necessary for the completion of the project.

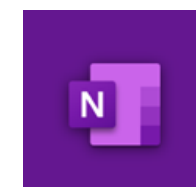
How did Teams help the Marketing Manager execute her roles and responsibilities?

- Native features like conference calling with screen share helps ensure the team stay on the same page.
- Note-taking in OneNote allows team members to have shared access to information.
- Create, assign, and track tasks individually or collaboratively with your team with Tasks by Planner and To Do.

Which app integrations on Teams made it possible?



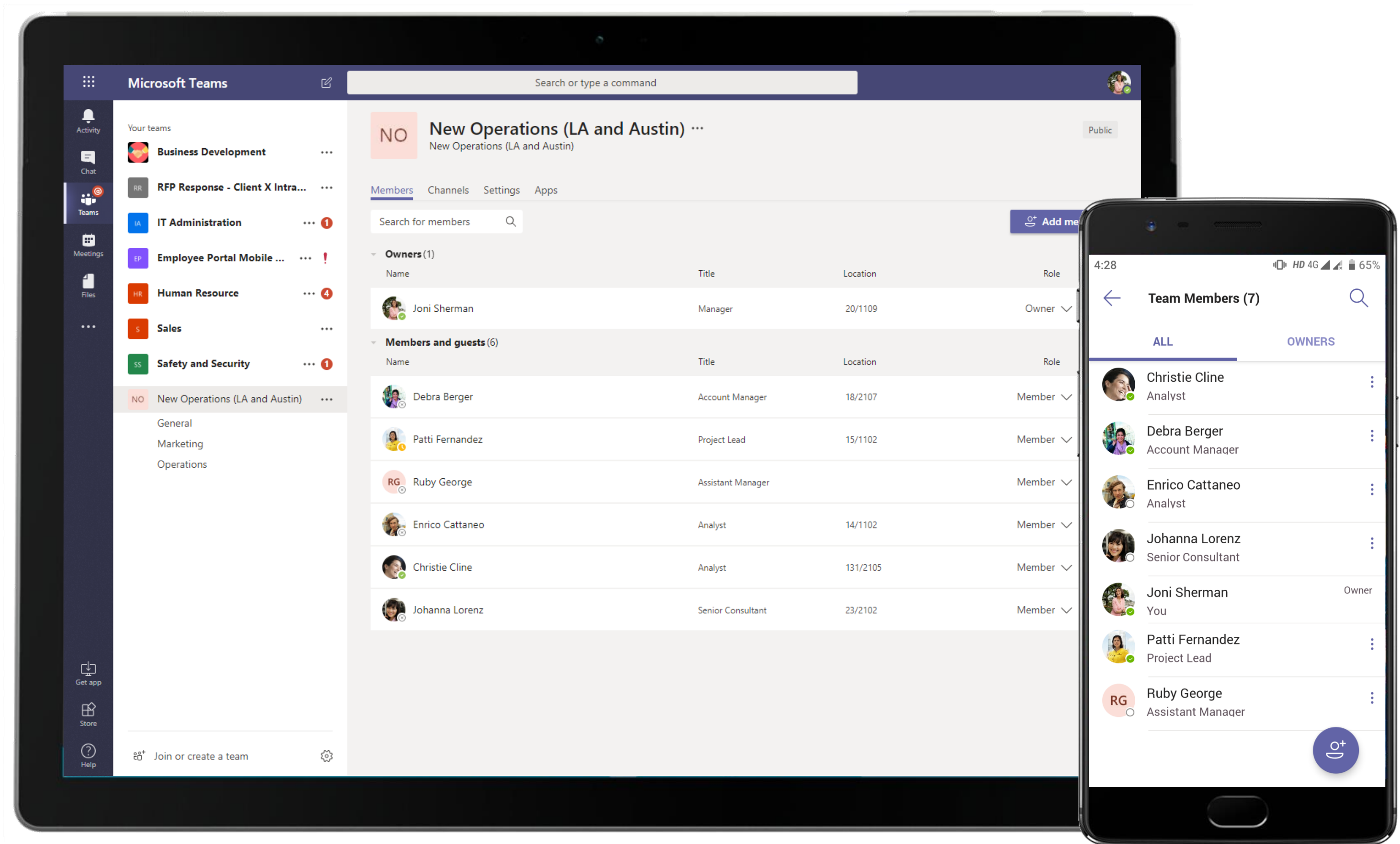
Excel



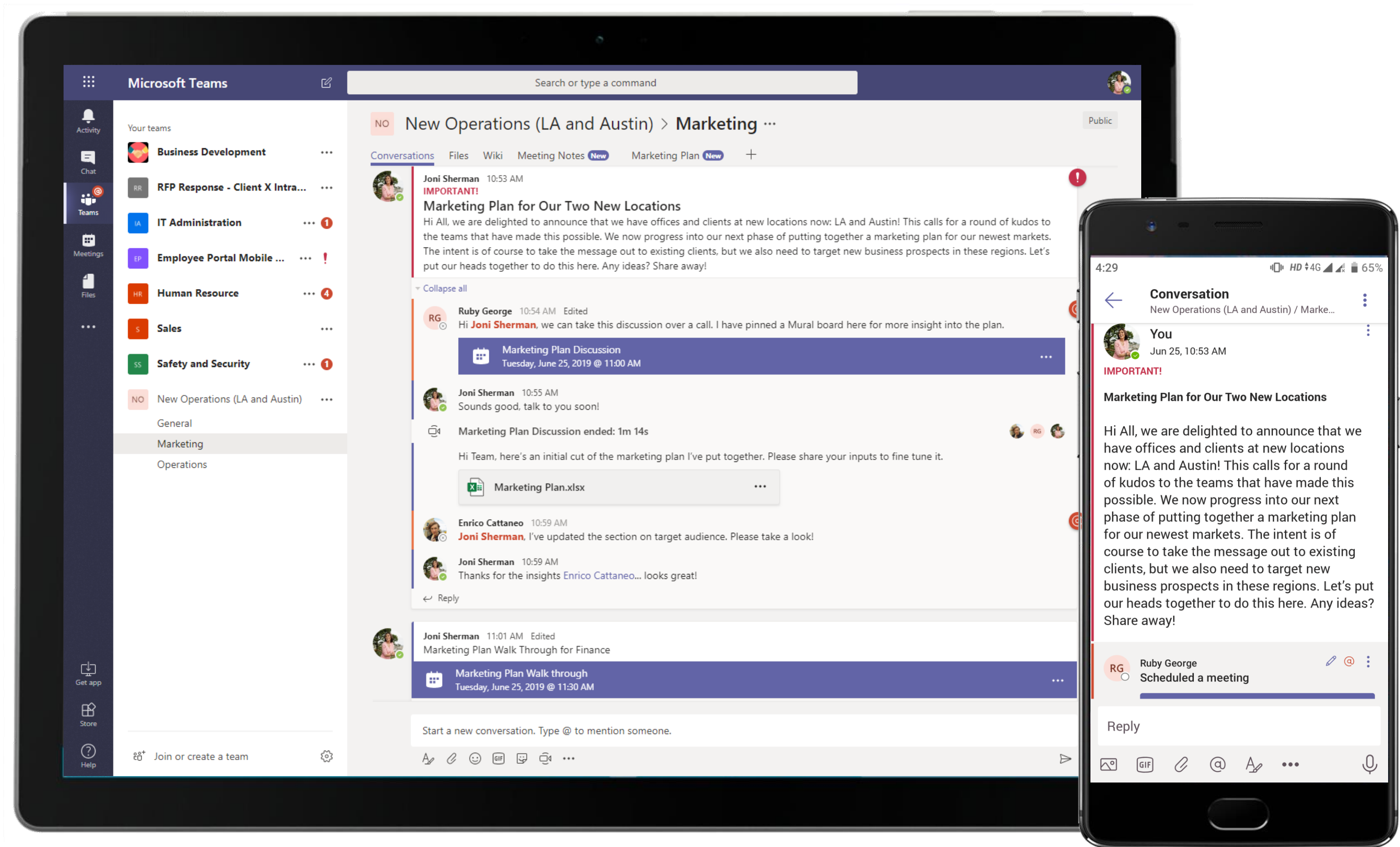
OneNote



Tasks by
Planner
and To
Do



The Marketing Manager uses a dedicated team to prepare and collaborate on a plan of action before a major event. A team can even include external members through protected guest access possible in Teams.



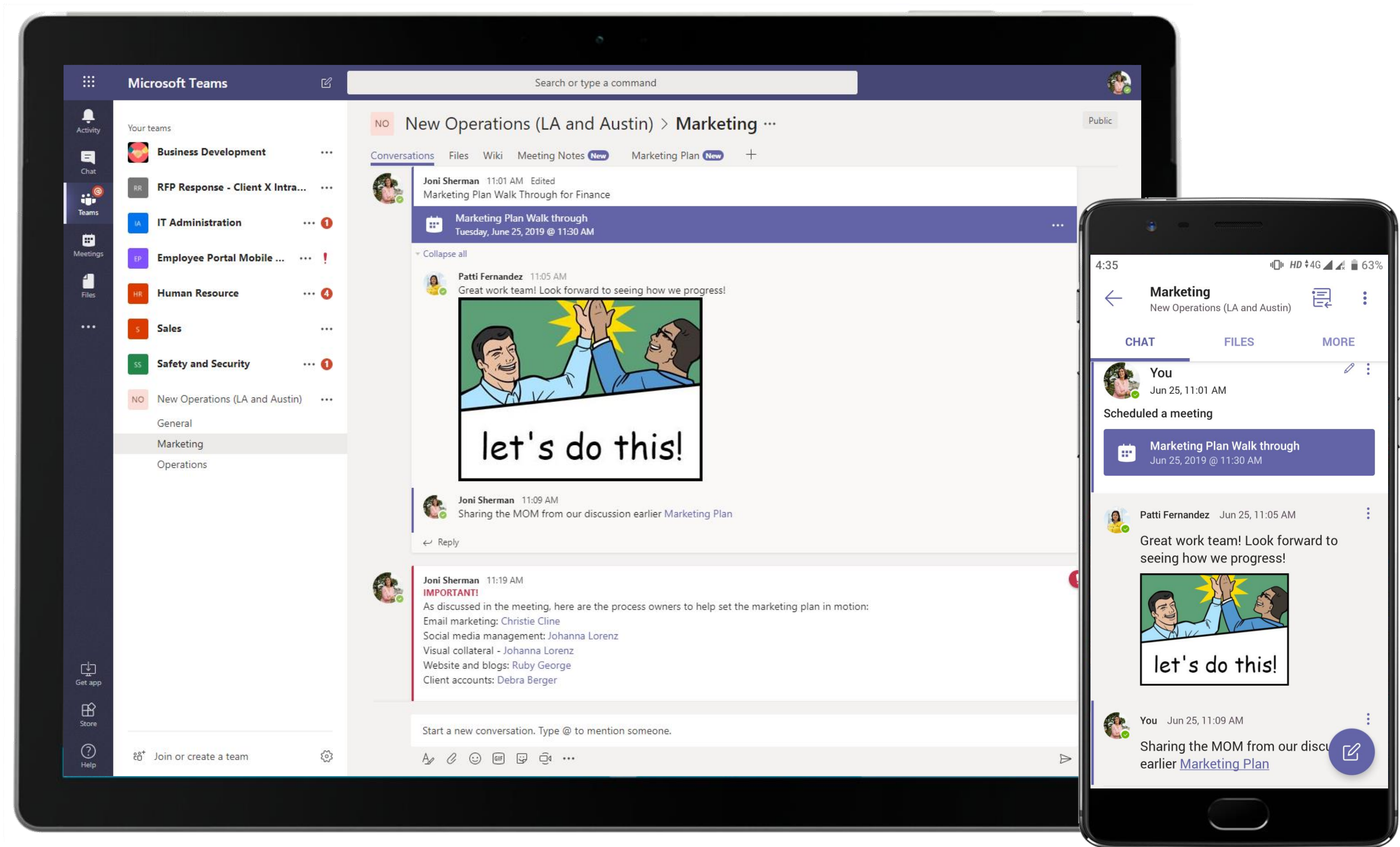
Microsoft Teams enables transparent communications through channel conversations. The Marketing Manager communicates in open-channel conversations and keeps team members up-to-date.

The screenshot displays the Microsoft Teams interface on a tablet and a smartphone. The tablet screen shows a shared Excel file named "Marketing Plan.xlsx" with the following data:

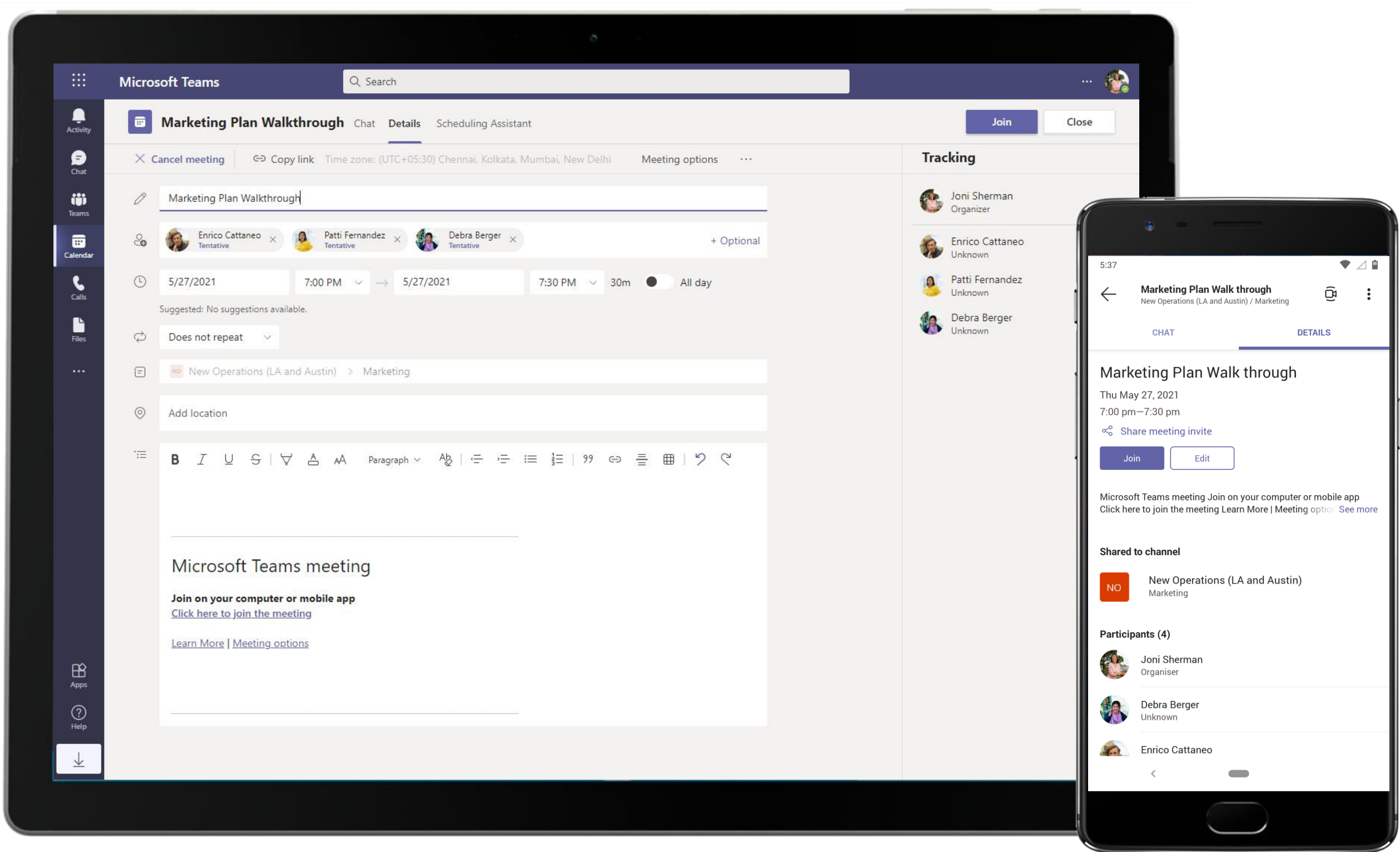
	WHAT TO DO	BUDGET	START DATE	END DATE	COMMENTS
1	Executive summary				
2	Objectives of plan	\$ xxx,xxx,xxx.xx	1/6/2019	5/6/2019	
3	Challenges of organization				New geography
4	Expectations if marketing plan was successful				Increase in client base
5	Mission				To extend to new markets
6					
7					
8					
9	Target market - LA				
10	Demographics				6010000
11	Avg client services needed				9,758
12	Marketing Strategy				
13	Promotions	\$ xxx,xxx			Digital and traditional marketing
14	Expansion				3 phase expansion strategy
15	Current marketing efforts				
16	Target market - Austin				
17	Demographics				5010078
18	Avg client services needed				2,300
19	Marketing Strategy				
20	Promotions	\$ xxx,xxx			Digital and traditional marketing
21	Expansion				3 phase expansion strategy
22	Current marketing efforts				

The smartphone screen shows a mobile view of the same "Marketing Plan.xlsx" file, displaying the title "MARKETING PLAN (LA and Austin)" and a list of the "WHAT TO DO" items, with "Demographics" highlighted at row 10.

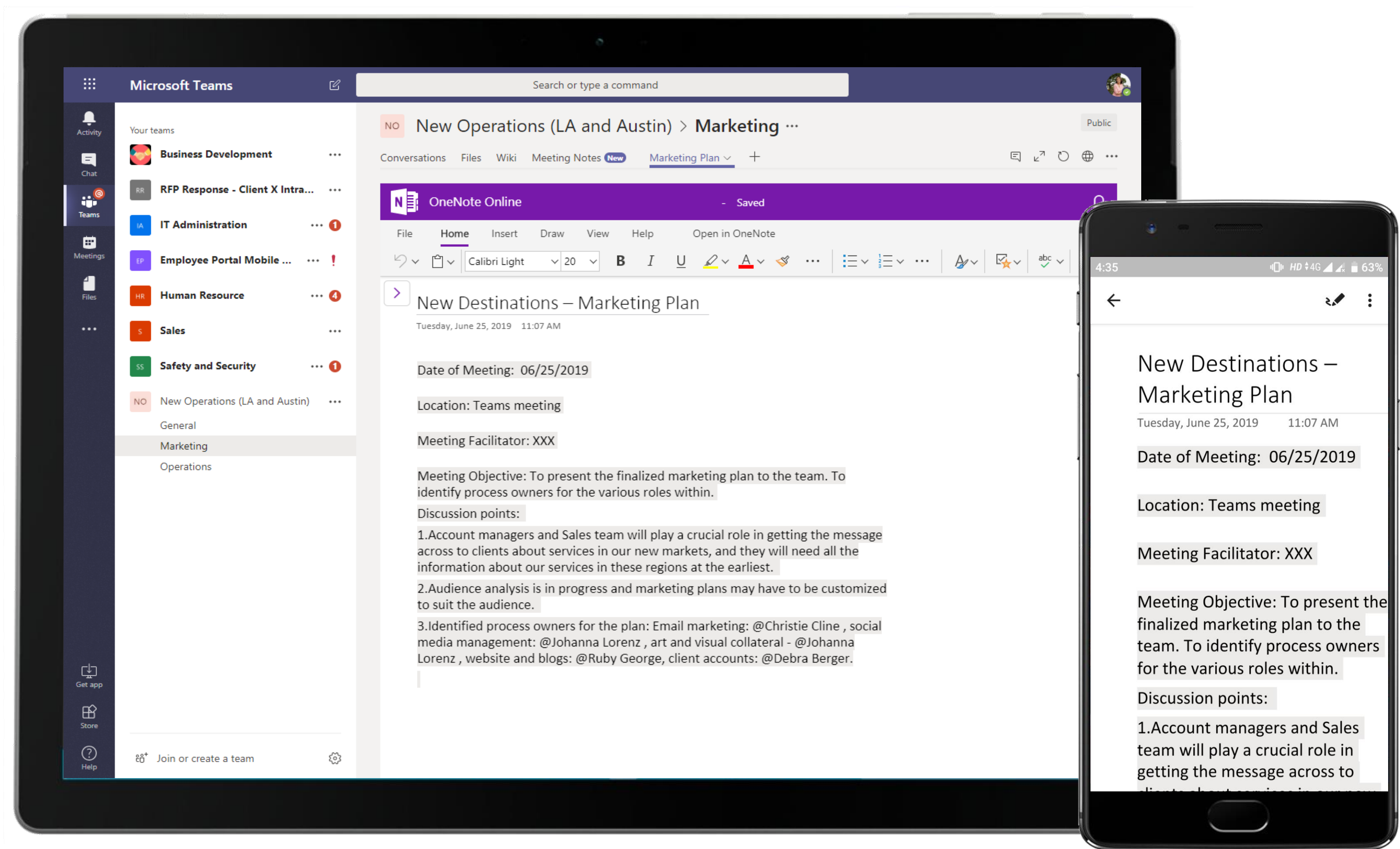
Microsoft Teams makes it easy to share files within channels. If the files are Word, Excel, or PowerPoint files, your colleagues can even view, edit and collaborate on the files right within Teams, thanks to deeply integrated Office 365 services.



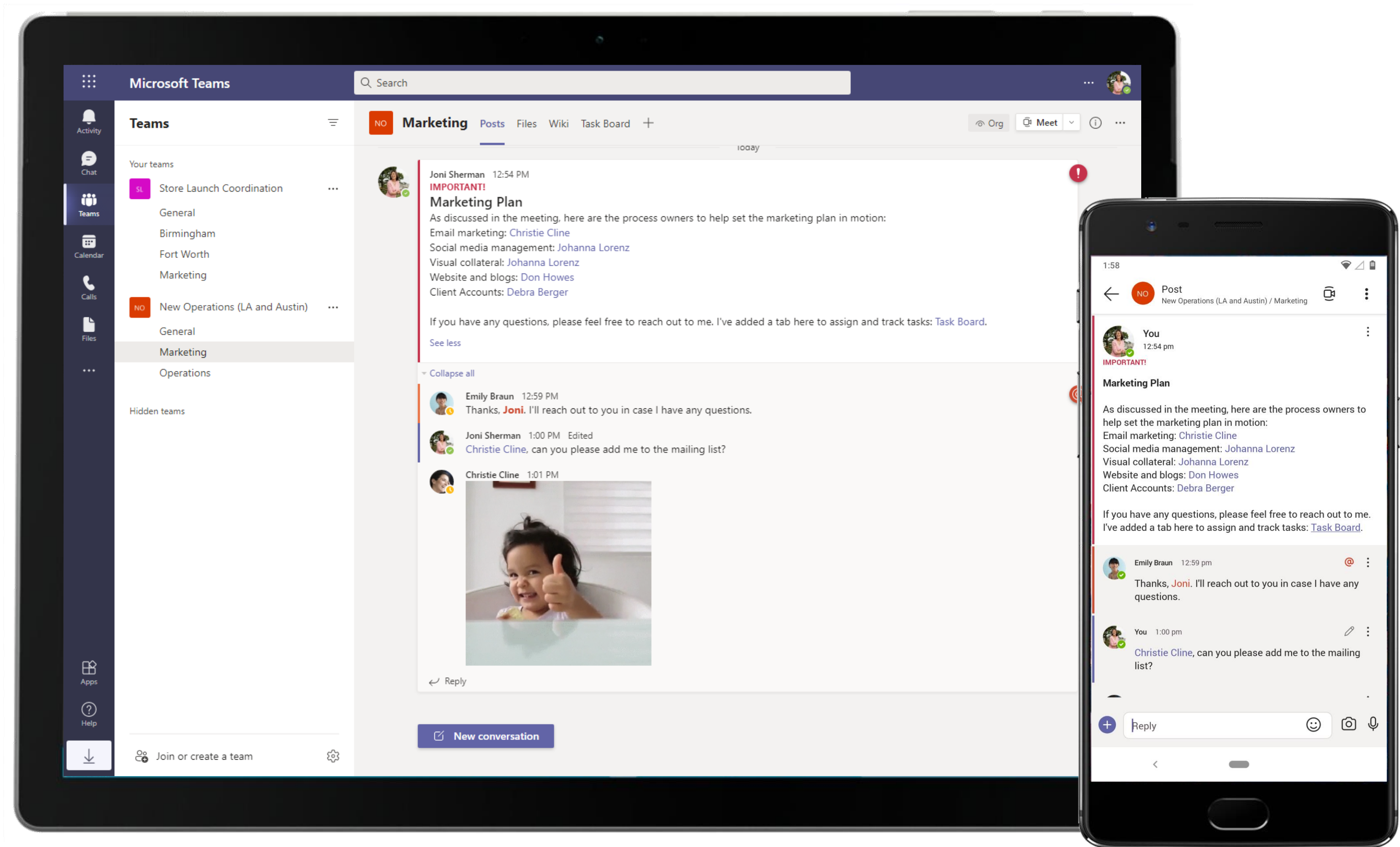
With Microsoft Teams, the Marketing Manager can schedule meetings without difficulty and find the best available times for invitees through the native scheduling calendar. Meeting threads make follow-up conversations a breeze, and even fun!



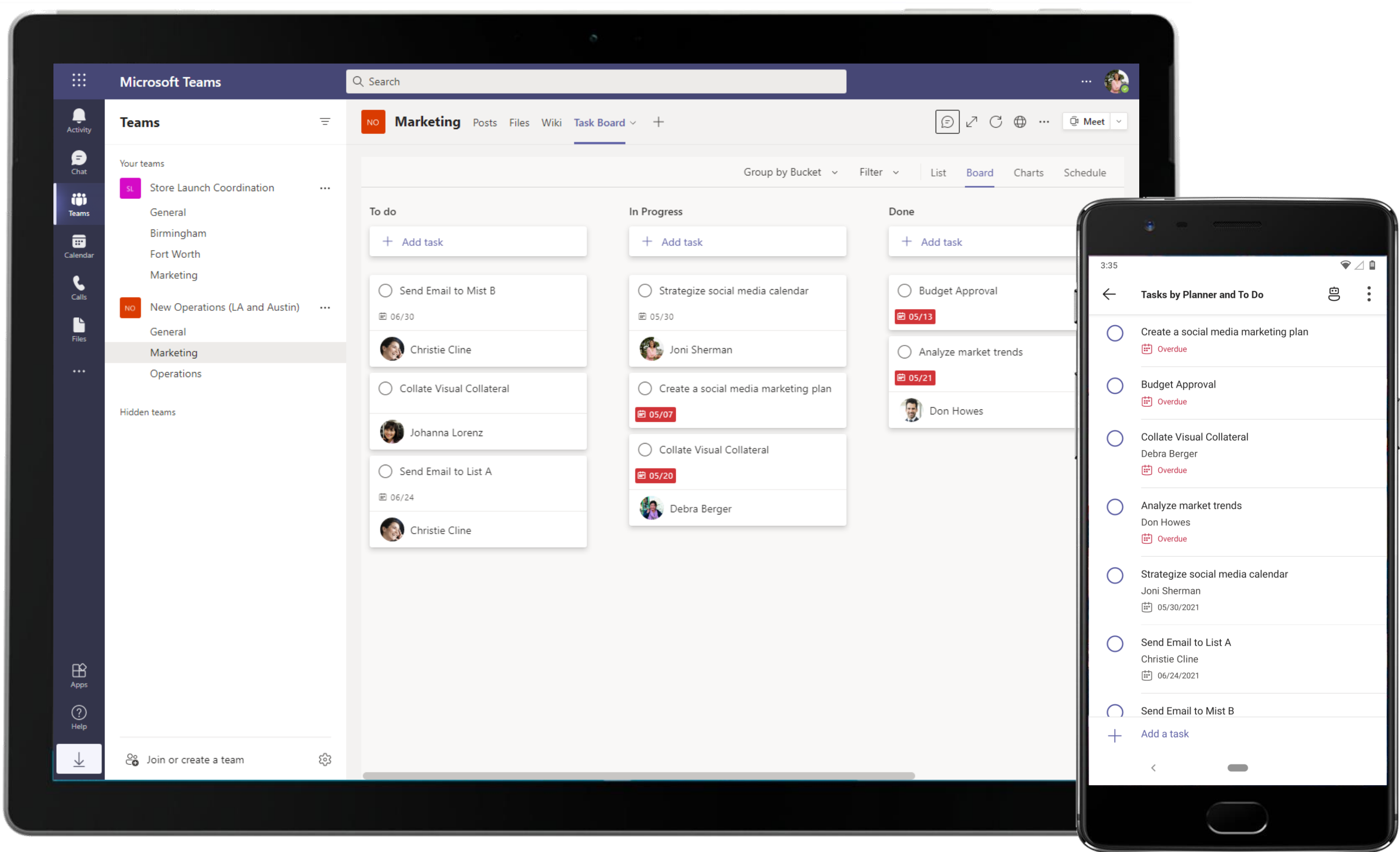
Meetings in Teams include audio, video and file sharing. And because they're online, you'll always have a meeting space and never need to find a room or projector to share ideas.



She 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.



The Marketing Manager delegates tasks to team members through channel communication. The @mention feature ensures that team members don't miss out on messages that need their attention!



The Marketing Manager delegates tasks to team members through channel communication. The @mention feature ensures that team members don't miss out on messages that need their attention!



Preparing for World Series

Marketing Project Lead

Scenario Walkthrough

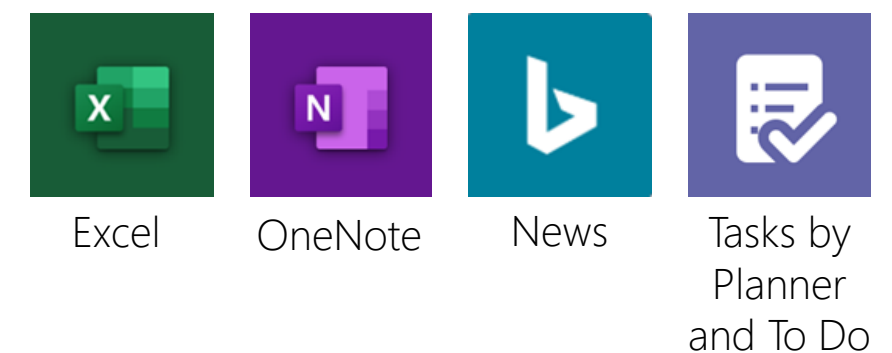
Contoso offers marketing services as part of their bouquet of professional services for clients. As the marketing partners for the MLB World Series, Contoso executes their marketing plans, relying on Microsoft Teams to communicate as well as serve as a protected environment to stash learnings from the efforts to build a toolkit to prepare for other such major events.

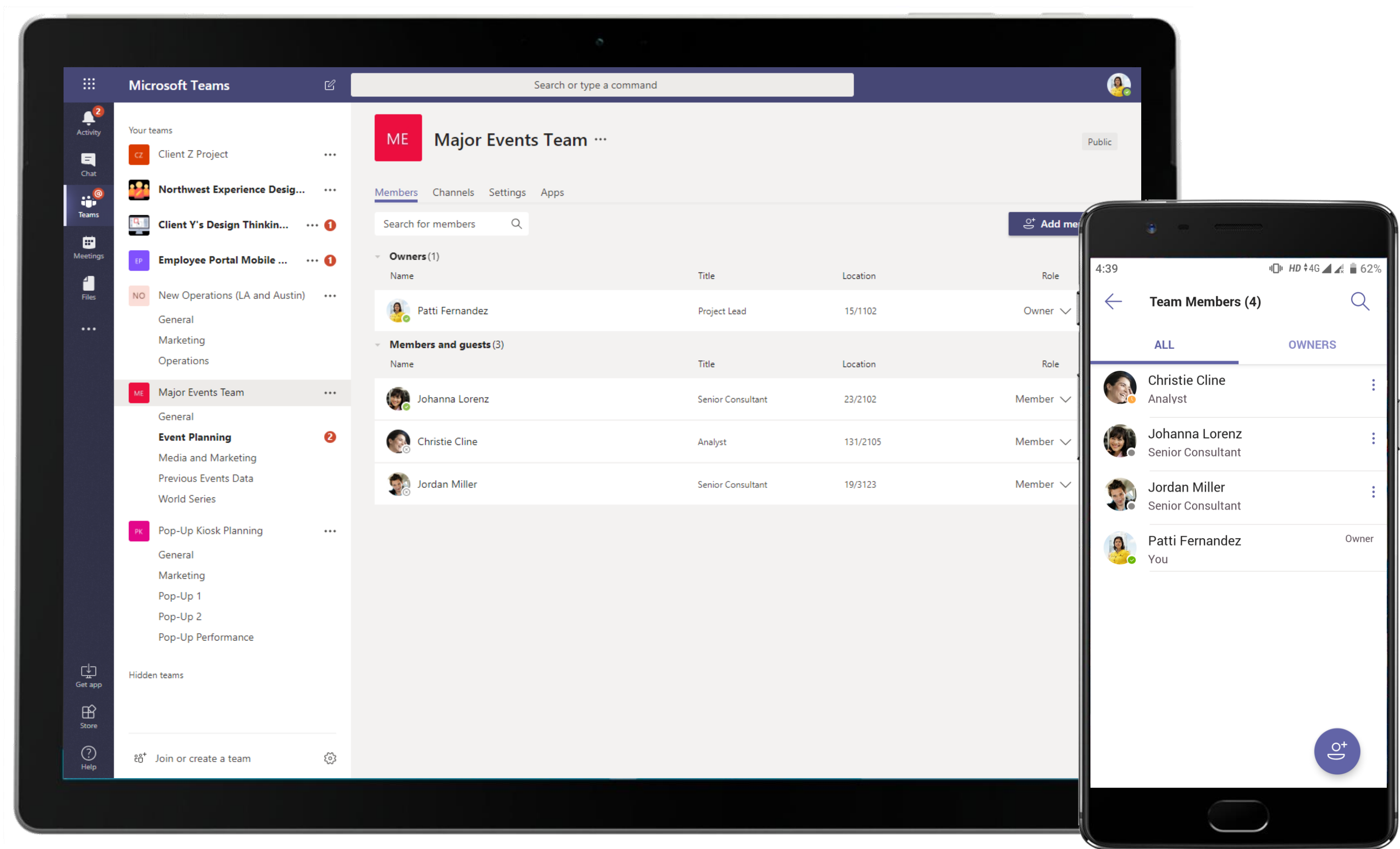
- Creates a channel and mobilizes various marketing efforts, keeping them all in tune with each other.
- Uses the News messaging extension to post news articles related to the World Series.
- Analyzes stats and trends from previous event in an exclusive channel.
- Schedules a kick-off meeting and assigns tasks using Planner.
- Reviews team members' tasks and execution, while files shared are hosted securely within the channel.
- Creates a best practices/future event toolkit using OneNote once the marketing campaign is in place.

How did Teams help the Marketing Project Lead execute her roles and responsibilities?

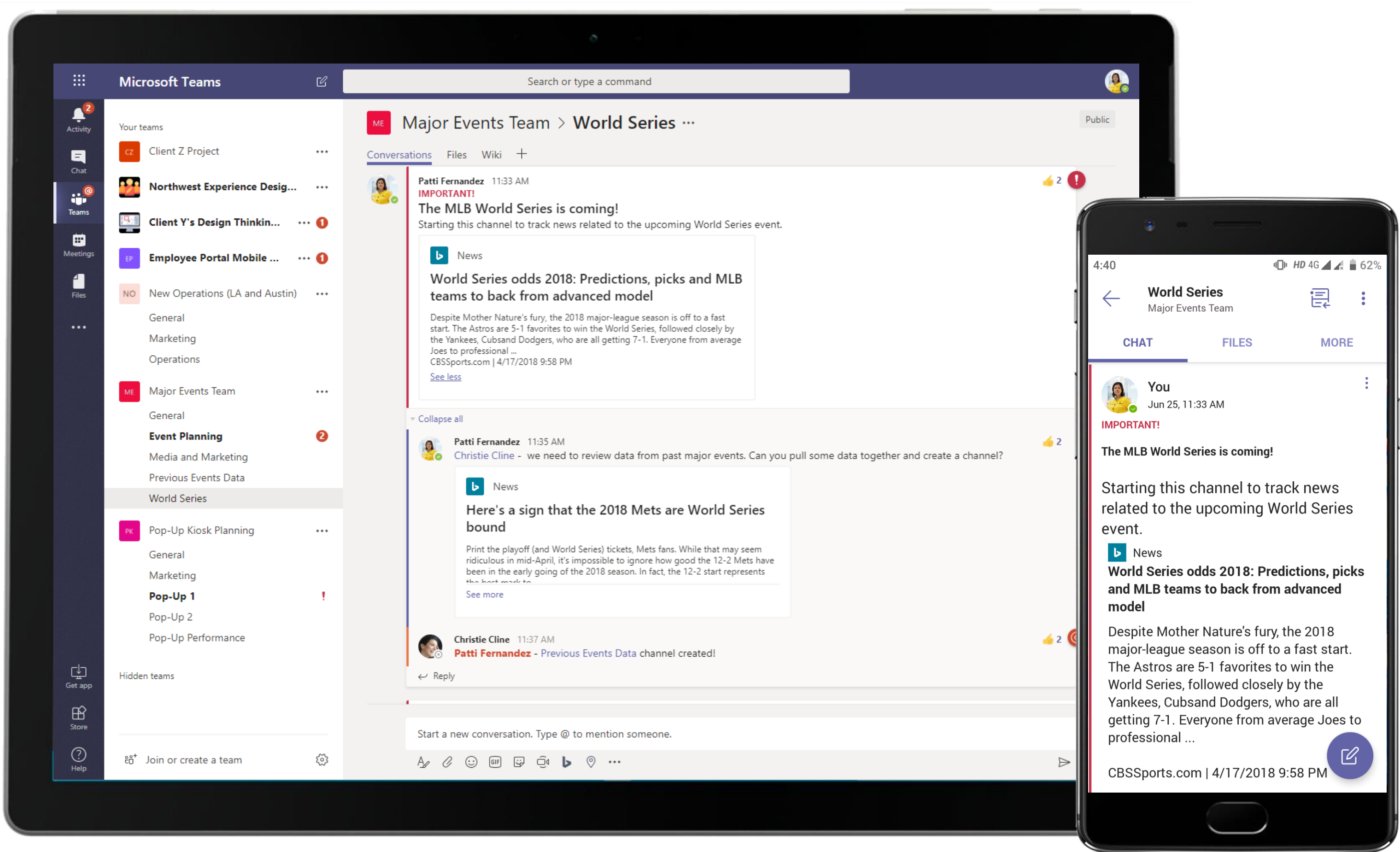
- Integrated Office 365 applications like Excel and OneNote help team collaborate better.
- Efficient task management made easy with Tasks by Planner and To Do.
- Find coverage of local, national, and worldwide current affairs with News and share it in a channel.

Which app integrations on Teams made it possible?

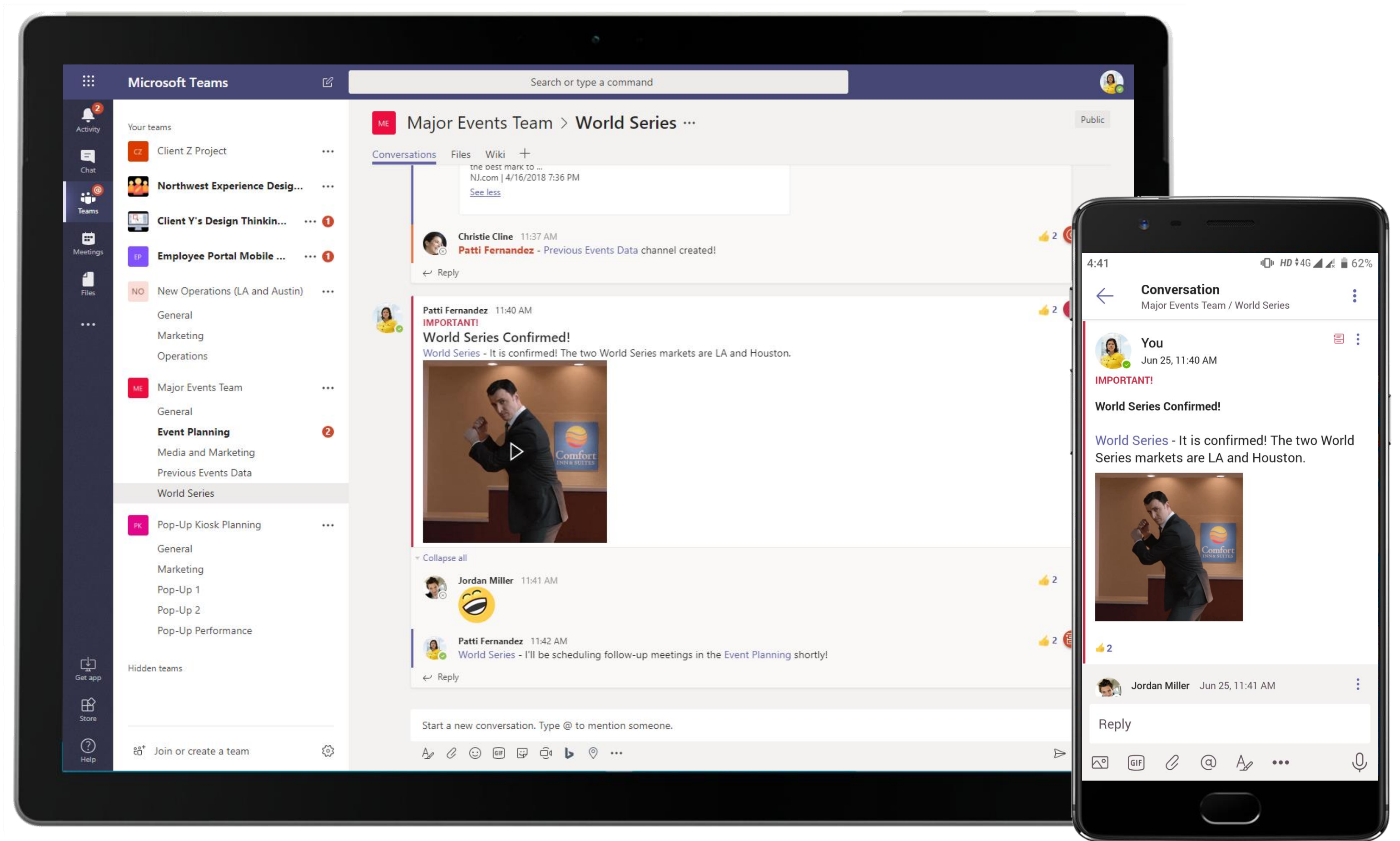




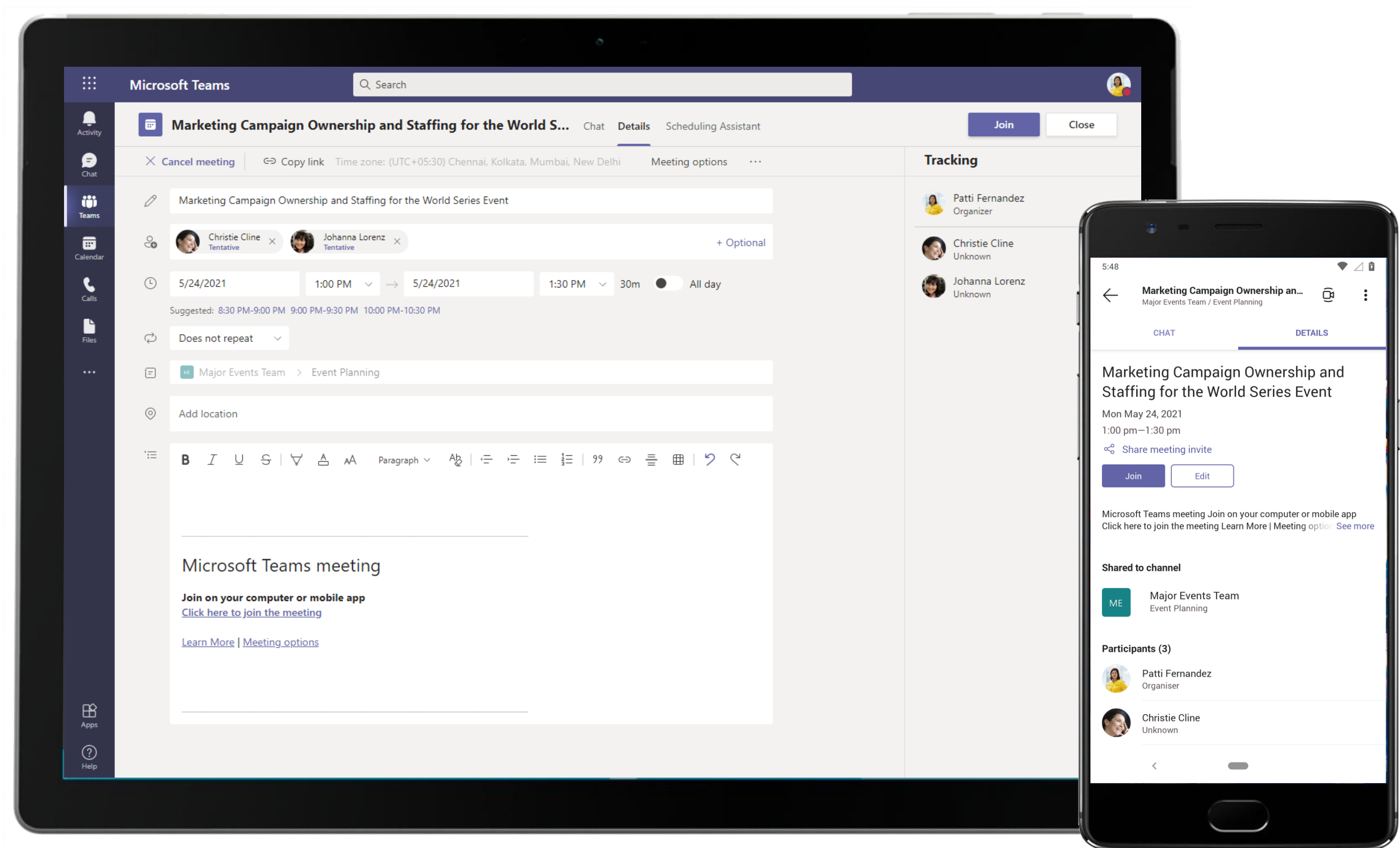
A team brings together a group of people for work, projects, or common interests. The Marketing Lead uses a dedicated team to prepare and collaborate on a plan of action before a major event.



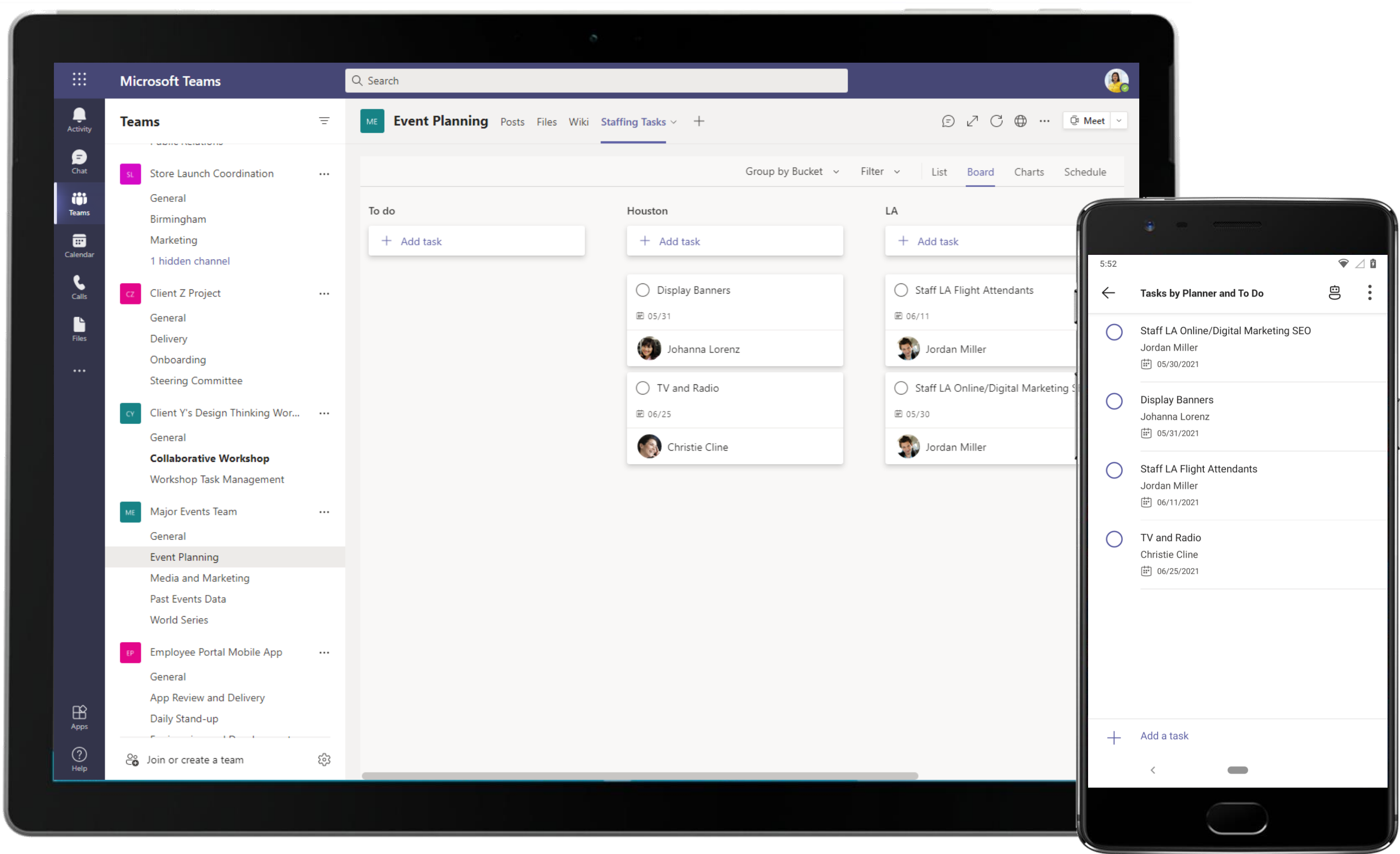
Share snippets of relevant news within the channel using the News app in the compose box of Teams, which allows the Marketing Lead to keep the team in the loop as well as engage them with important or interesting stories.



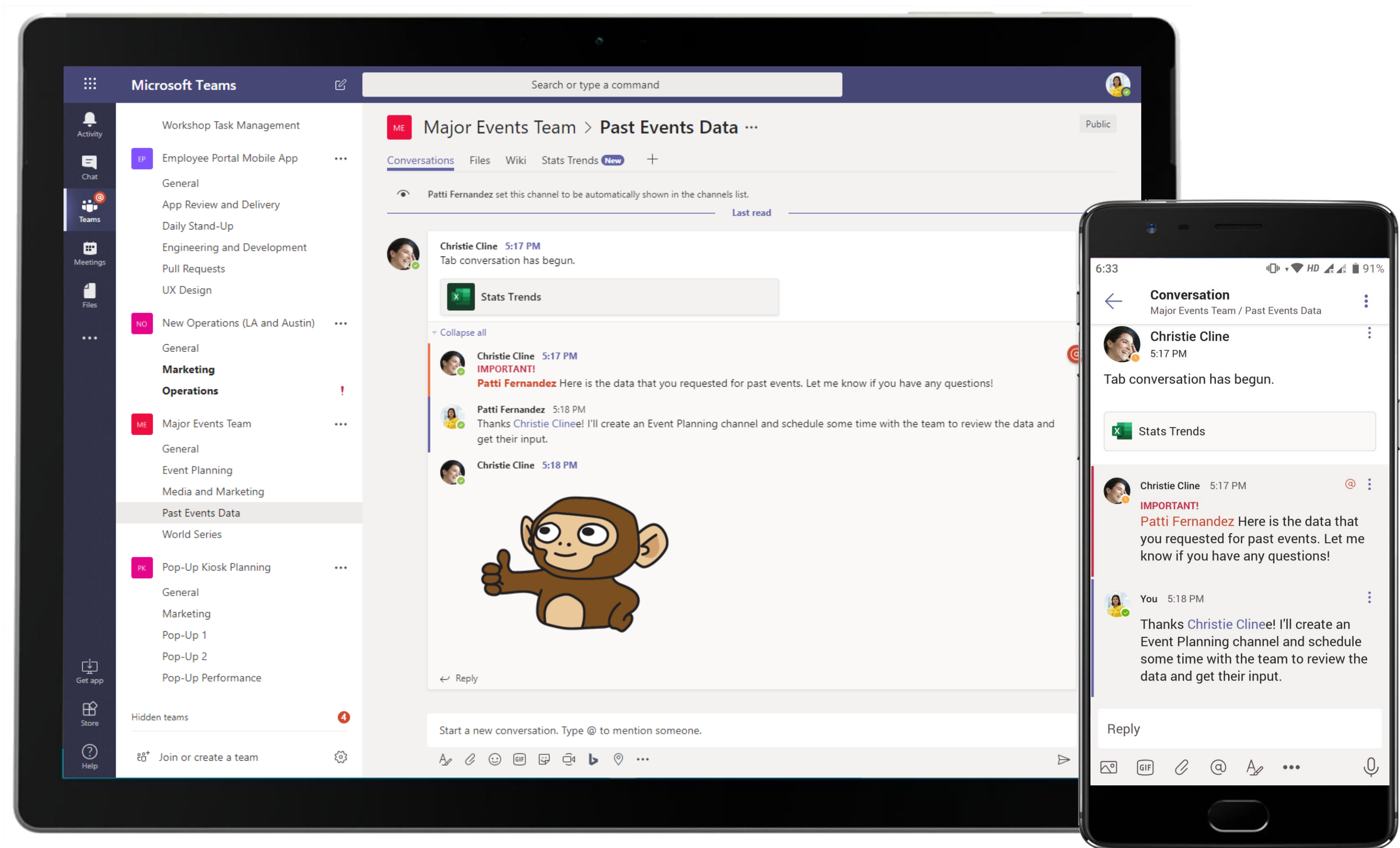
Got updates for you team? It just takes one post to get the message across to everyone in the channel! What's more – GIFs and stickers available right when you compose messages allow making business critical tasks fun as well!



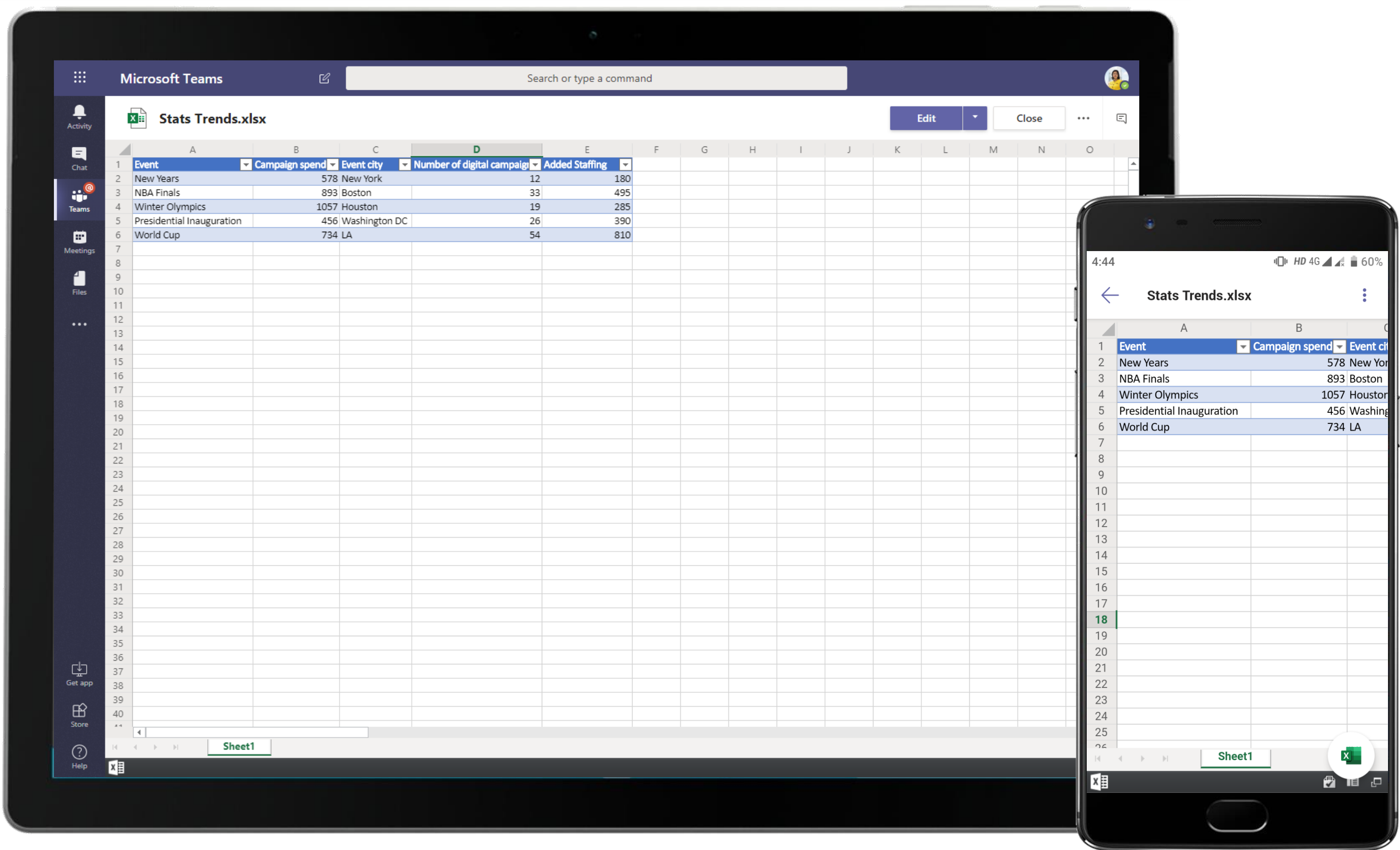
Microsoft Teams is a great way to schedule meetings, especially if the participants don't all work in the same geographic area. It seamlessly integrates scheduling, invitations, updates and access to virtual meetings.



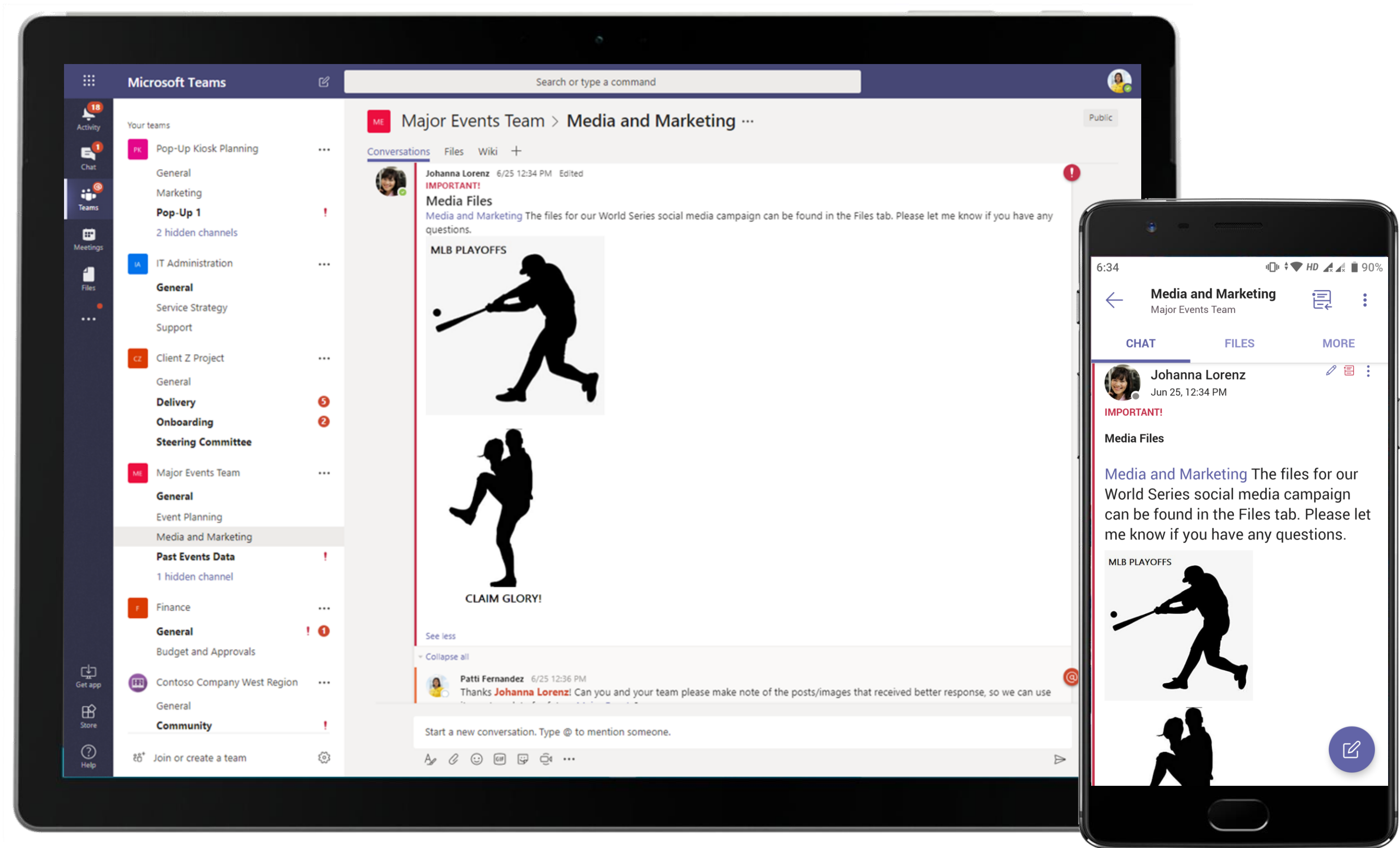
Organize tasks by adding one or more Tasks by Planner and To Do tabs to a channel in Teams. This allows the Marketing Lead to keep track of the tasks assigned to each stakeholder and follow-up on the progress for each task with ease through Teams.



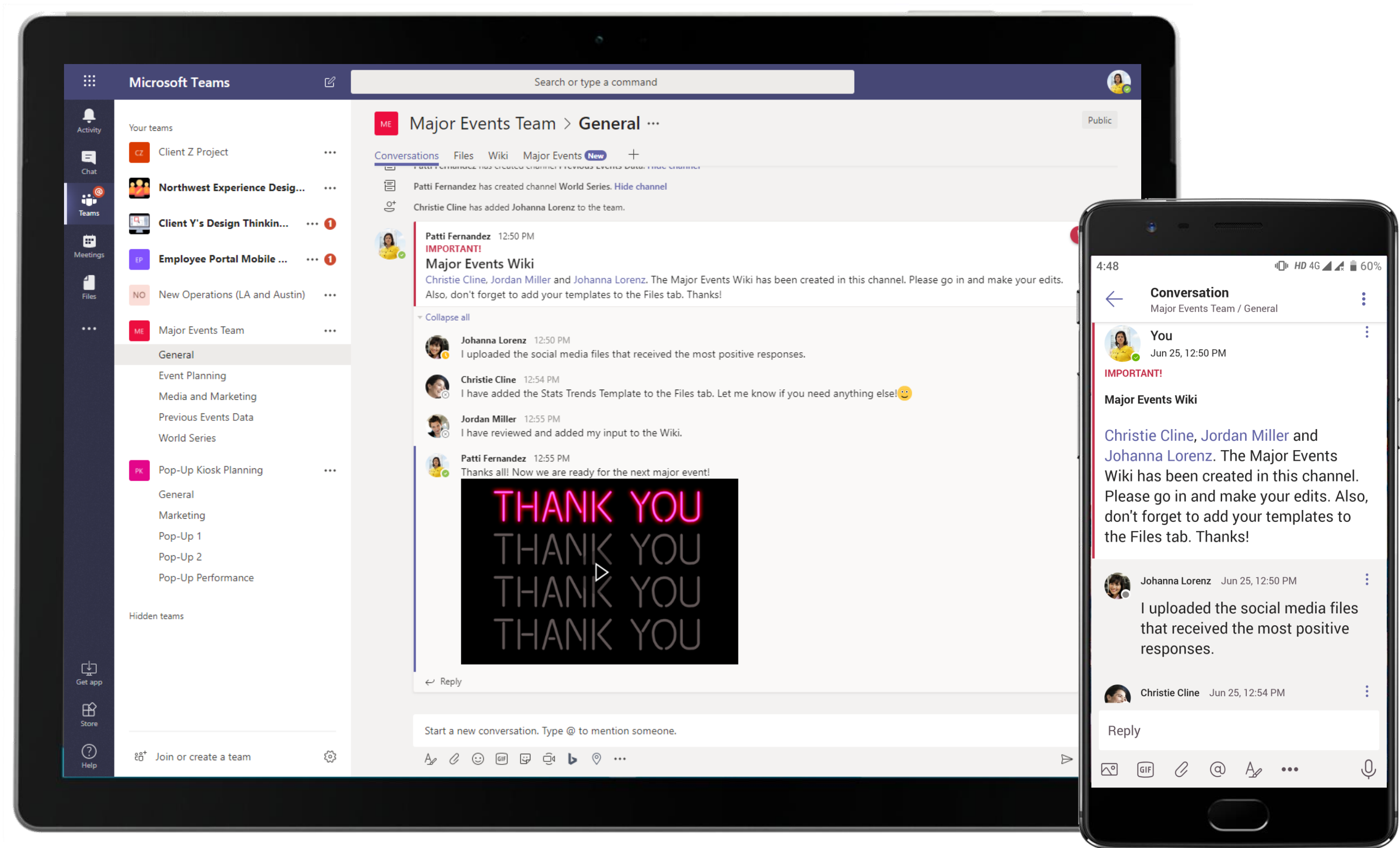
Customize a team with tabs. Add tabs for files, notes, websites and apps – it makes it easy for team members to access frequently used content or services with just one tap. The Excel tab with stats is easily accessible to the team.



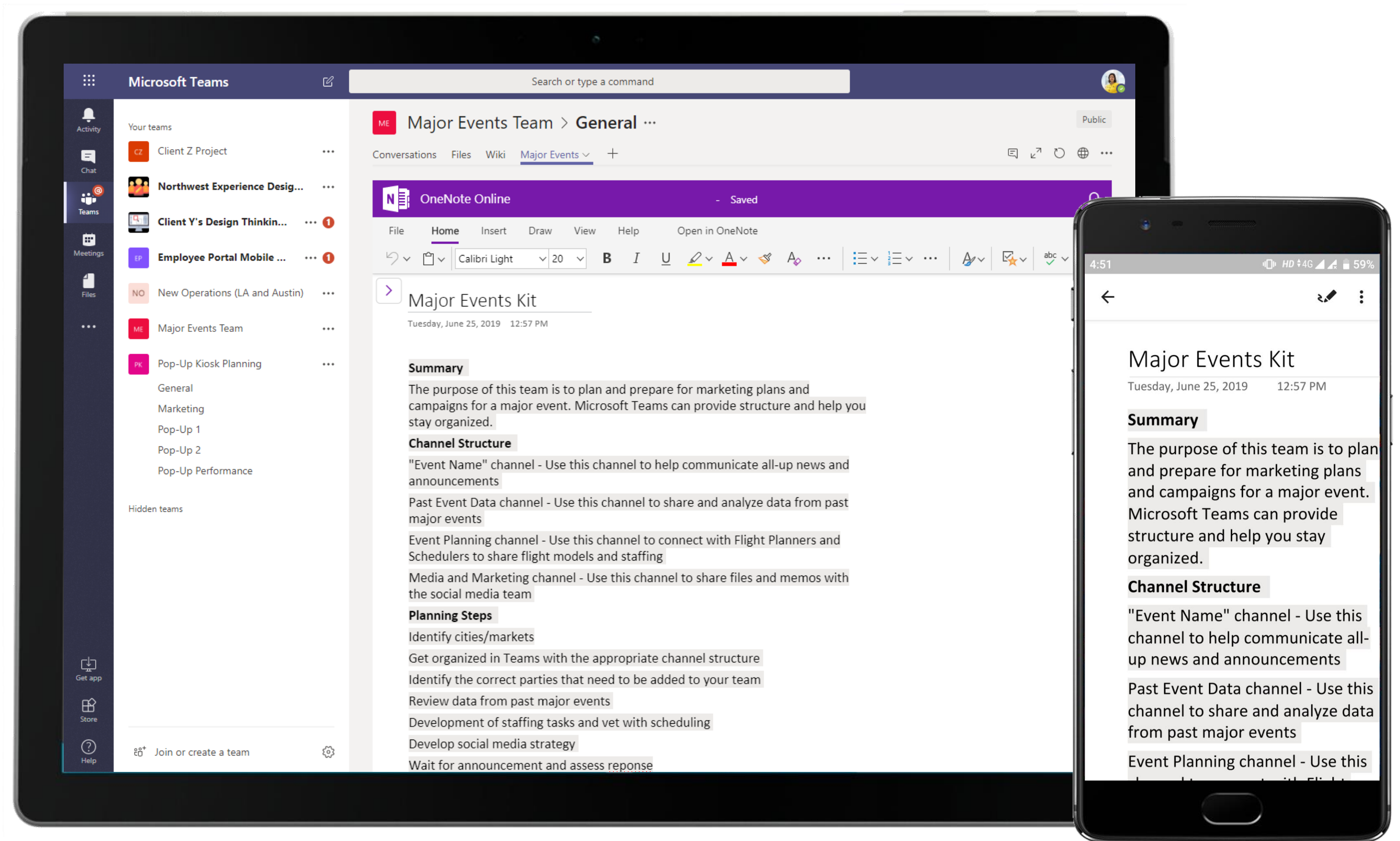
Create impactful summaries of crucial data with Excel, Word and OneNote for Microsoft Teams. Pin the files as a tab within the channel for the team's easy access. The Marketing Lead uses a tab to review stats of previous large-scale events.



A lot of the Marketing team's efforts to push their services to customers include visual aids such as pictures and videos. The Files repository is a protected place to house the media files the Marketing Lead collates from her team.



With the plan coordinated and executed to perfection, it's time now for the team to acknowledge each other's efforts in an open forum and to reflect on the learnings from the experience.



Host training and reference material in OneNote for the team's easy access and consumption within channels. The team can always go back and refer to notes, learnings and best practices from past activities right inside Teams!



Pop-Up Kiosks

Marketing Project Lead

Scenario Walkthrough

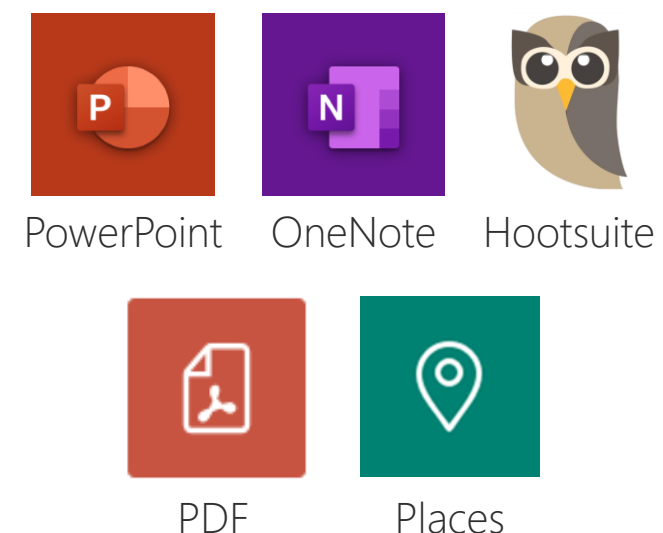
Contoso's client, a popular chain of home furnishing stores, is looking for new ways to reach customers and expand their customer base. The Marketing Lead identifies pop-up kiosks at malls across the country as an ideal way to reach their target audience. In these kiosks, Contoso will offer customers a closer look at their client's plush home furnishing line. Here's how she can use Teams to manage the entire pop-up kiosks program remotely.

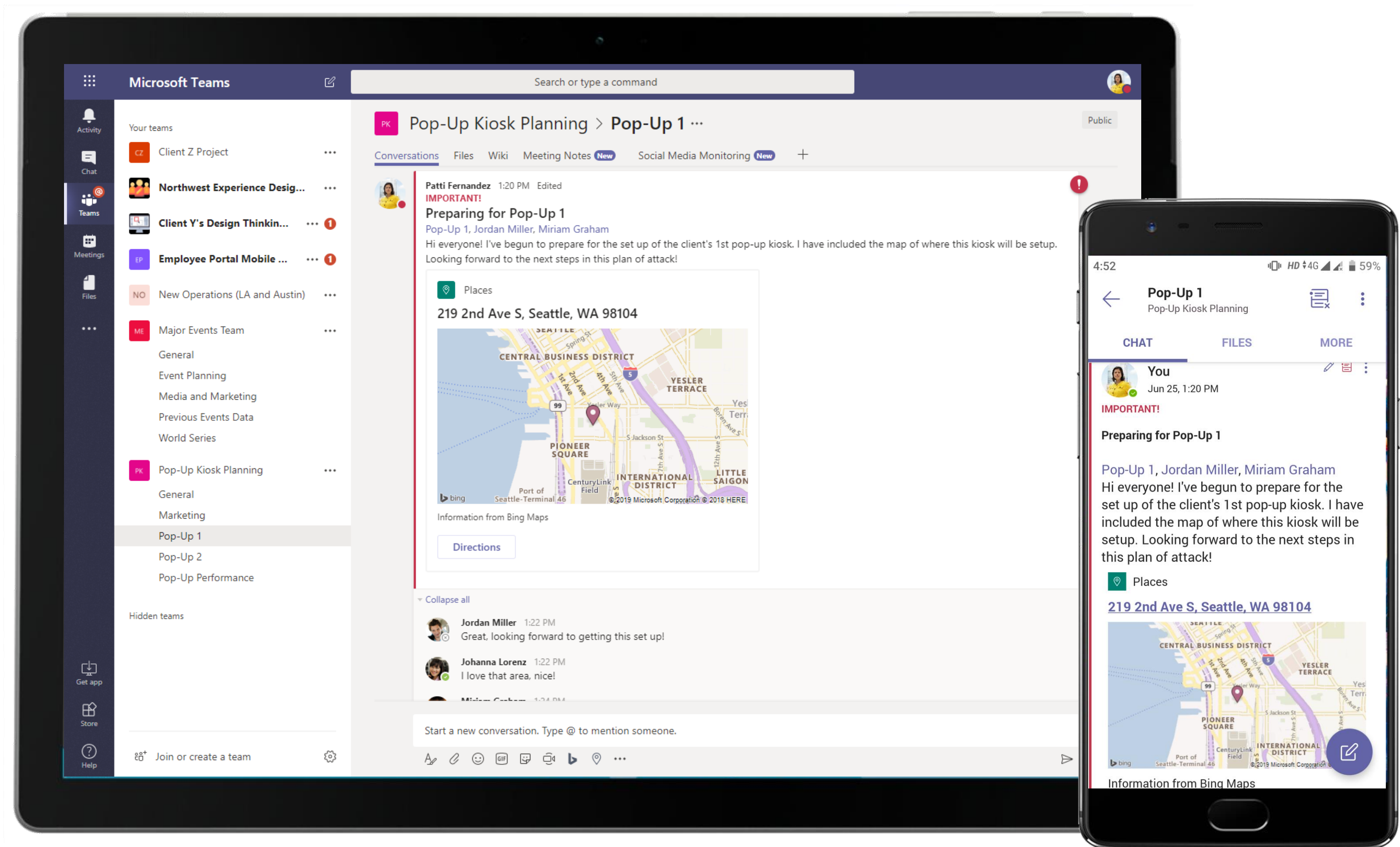
- Finalizes the first location for the kiosk and posts an announcement in the channel.
- Announces kick-off meeting to fine tune plans for the kiosk.
- Reviews social media plan and response to the announcements in various social media channels.
- Reviews social media response using Hootsuite integrated in Teams.
- Coordinates third party vendor selection and quotes and finalizes details for the kiosk.

How did Teams help the Marketing Project Lead execute her roles and responsibilities?

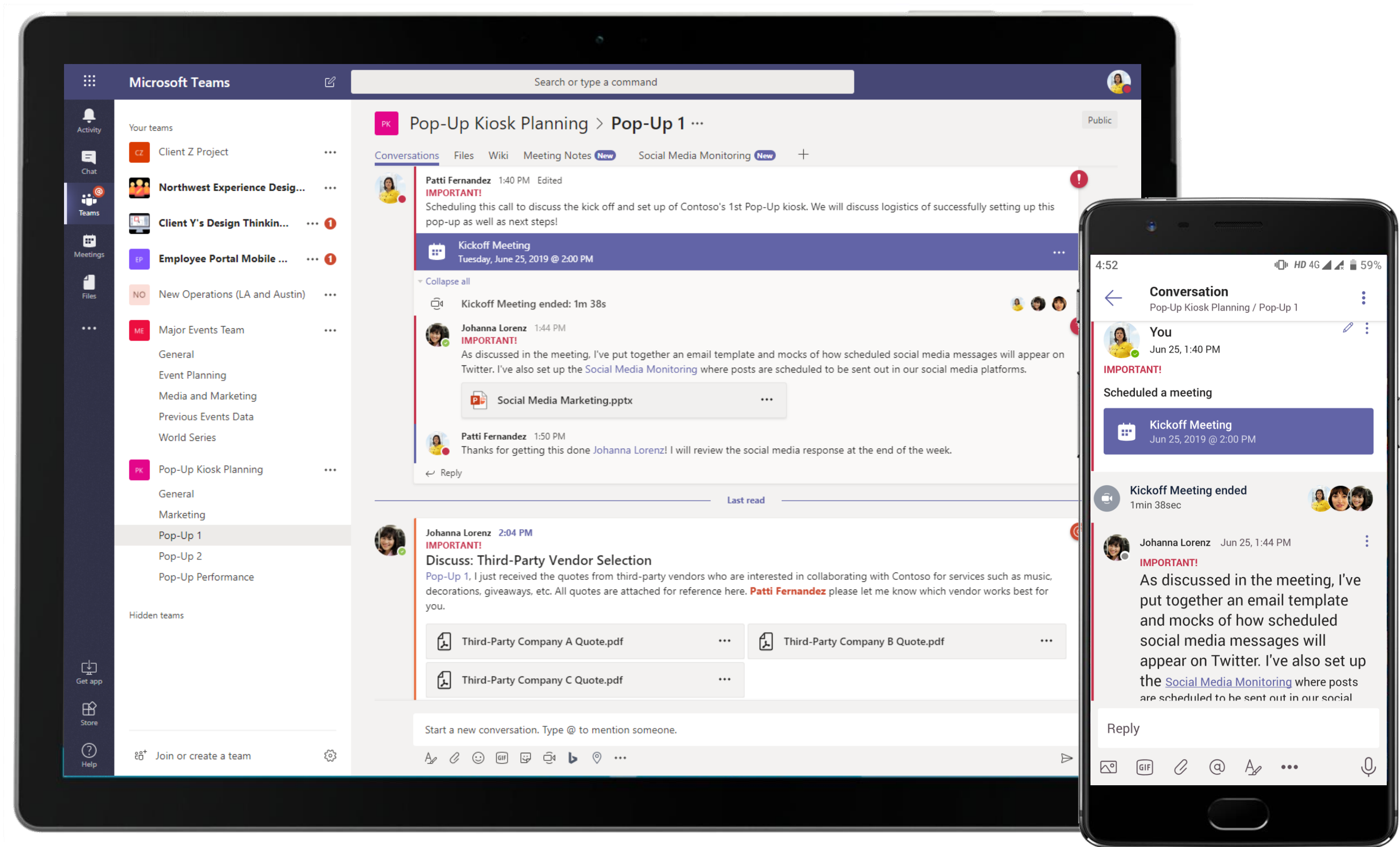
- Real-time tracking of social media impact with Hootsuite.
- Clear and concise presentations with PowerPoint in Teams.
- Look up detailed info about different businesses, restaurants, venues, and more with Places
- Note-taking and sharing with ease using OneNote.

Which app integrations on Teams made it possible?

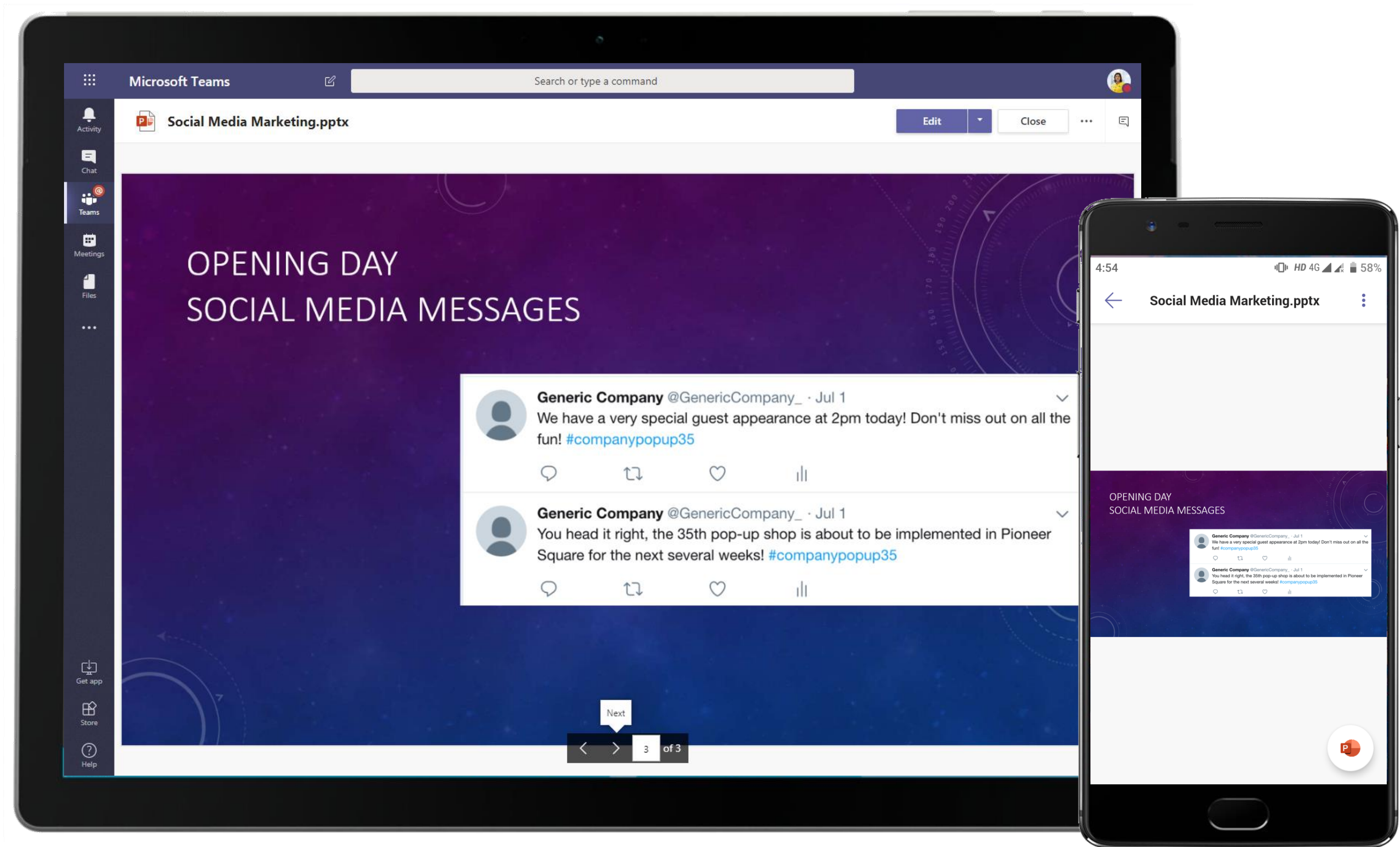




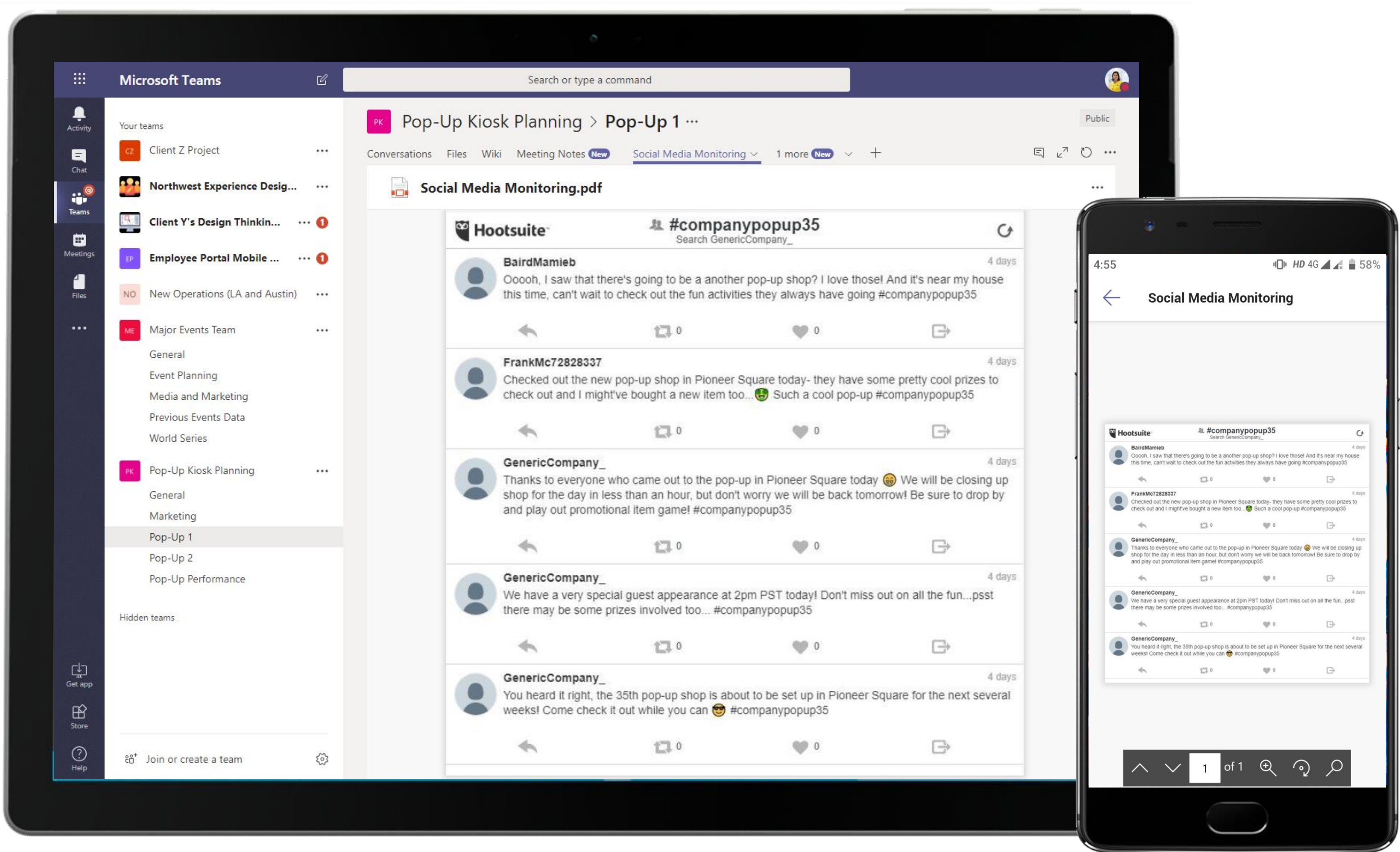
Once the Marketing Lead finalizes the location for the pop-up kiosk, she posts an announcement in the channel tagging the location using Places in Microsoft Teams.



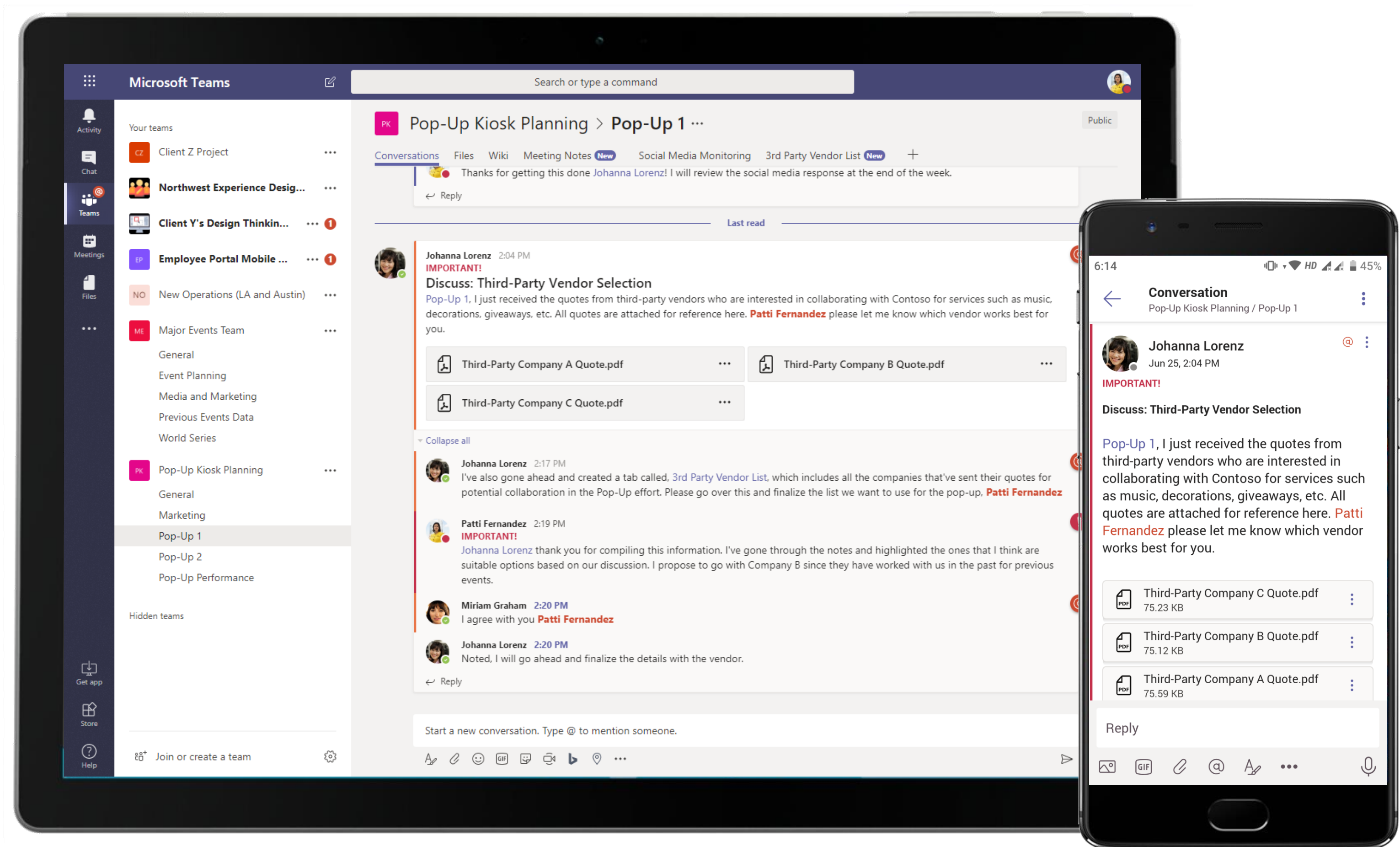
Keep conversations, meetings and relevant documents all in one place with Microsoft Teams. The Marketing Lead provides context to the meeting through channel conversation and continues to interact with her team on the same thread.



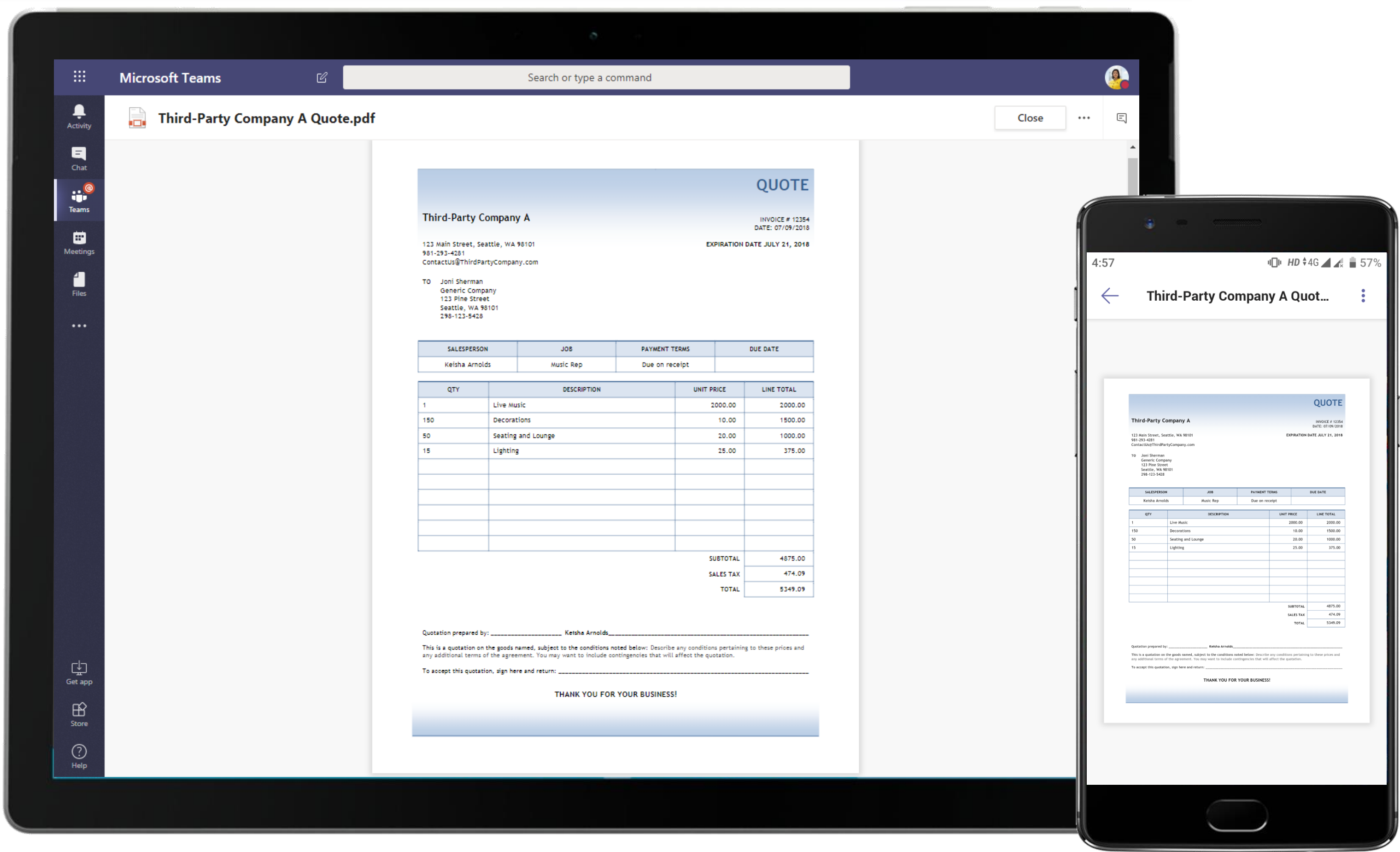
Create and share PowerPoint presentations over a Teams call to make meetings meaningful and to offer attendees a visual representation of key points covered.



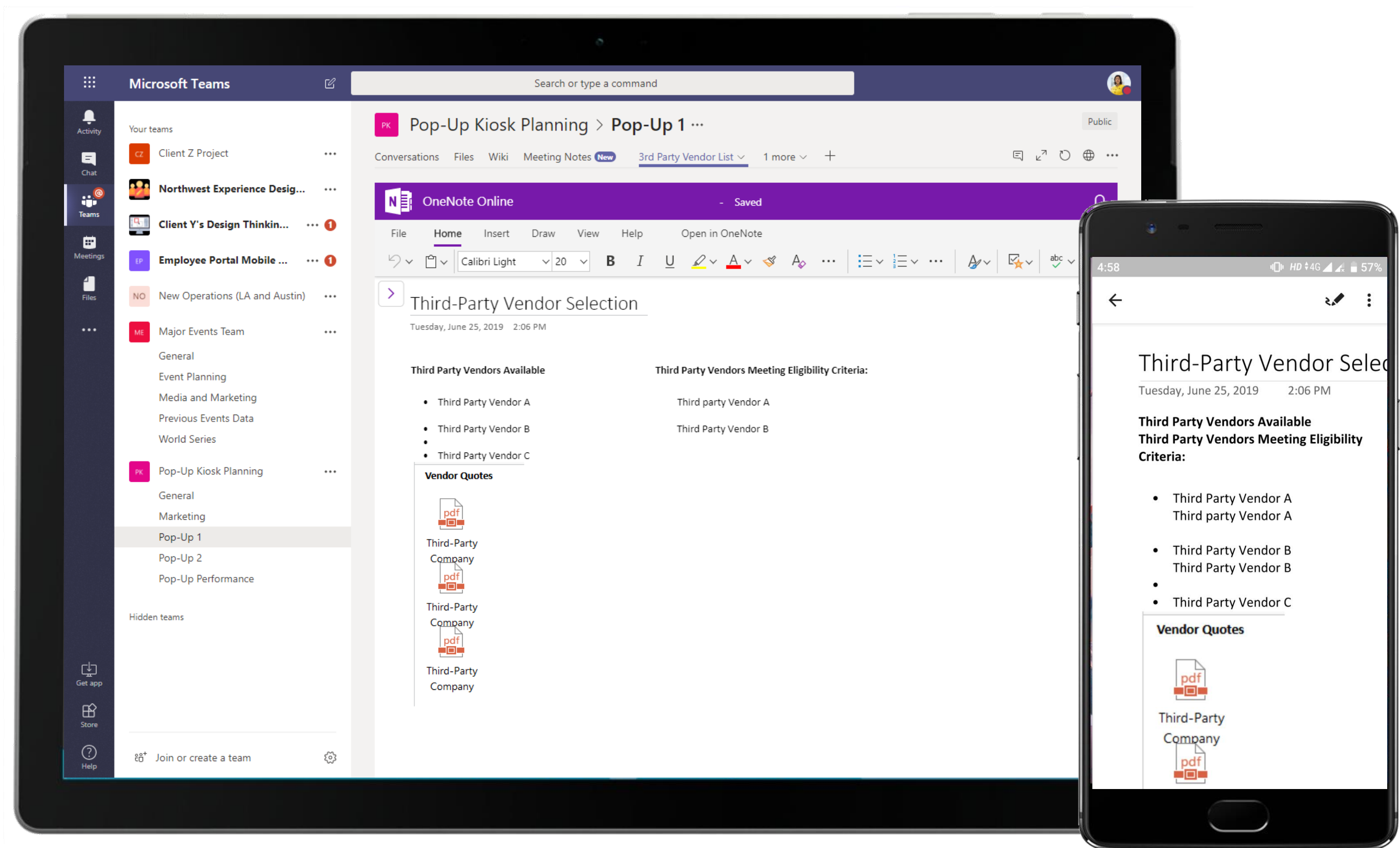
Social media management in Teams! You can monitor Hootsuite streams, collaborate on customer support issues and publish social messages—right from Microsoft Teams.



The Marketing Lead smoothly coordinates vendor selection and quotes for the kiosk from within Teams. Team members upload the quotes from vendors and she can access and compare them from one centralized location.



The Files tab in each channel is a cloud-enabled repository, where team members can store and share important files within a protected environment., such as the vendor quotes in this case.



Host reference material in OneNote within the channel for the team’s easy access and consumption. The Marketing Lead uses OneNote to maintain notes on vendor selection and pins it as a tab for reference.



Monitoring Negative Responses

Marketing Analyst

Scenario Walkthrough

Contoso manages the digital marketing activities for their client who specializes in home furnishing. Negative feedback from unhappy customers requires Contoso to jump into damage control mode for the client and ensure that they provide end customers with the best possible outcome. Meanwhile, the backlash in social channels is closely monitored and mitigated by the Marketing Analyst.

- Automates a flow for tweets with a specific hashtag to be directly posted in a channel via Power Automate.
- Reviews the posts in the channel with the Account Manager to analyze the results of the social media scan.
- Evaluates the negative statements and tracks pick-ups from news agencies.
- Views an overall Social Media Scorecard Power BI tab set up in the channel to help plan remedial measures and campaigns.

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

- Automate business workflows and track social media activity with Power Automate.
- Real-time tracking of social media impact via Microsoft Flow relays posts to a dedicated channel set up in Teams.
- Facilitation of data-driven decisions informed by visualizations and scoring in Power BI for Microsoft Teams.

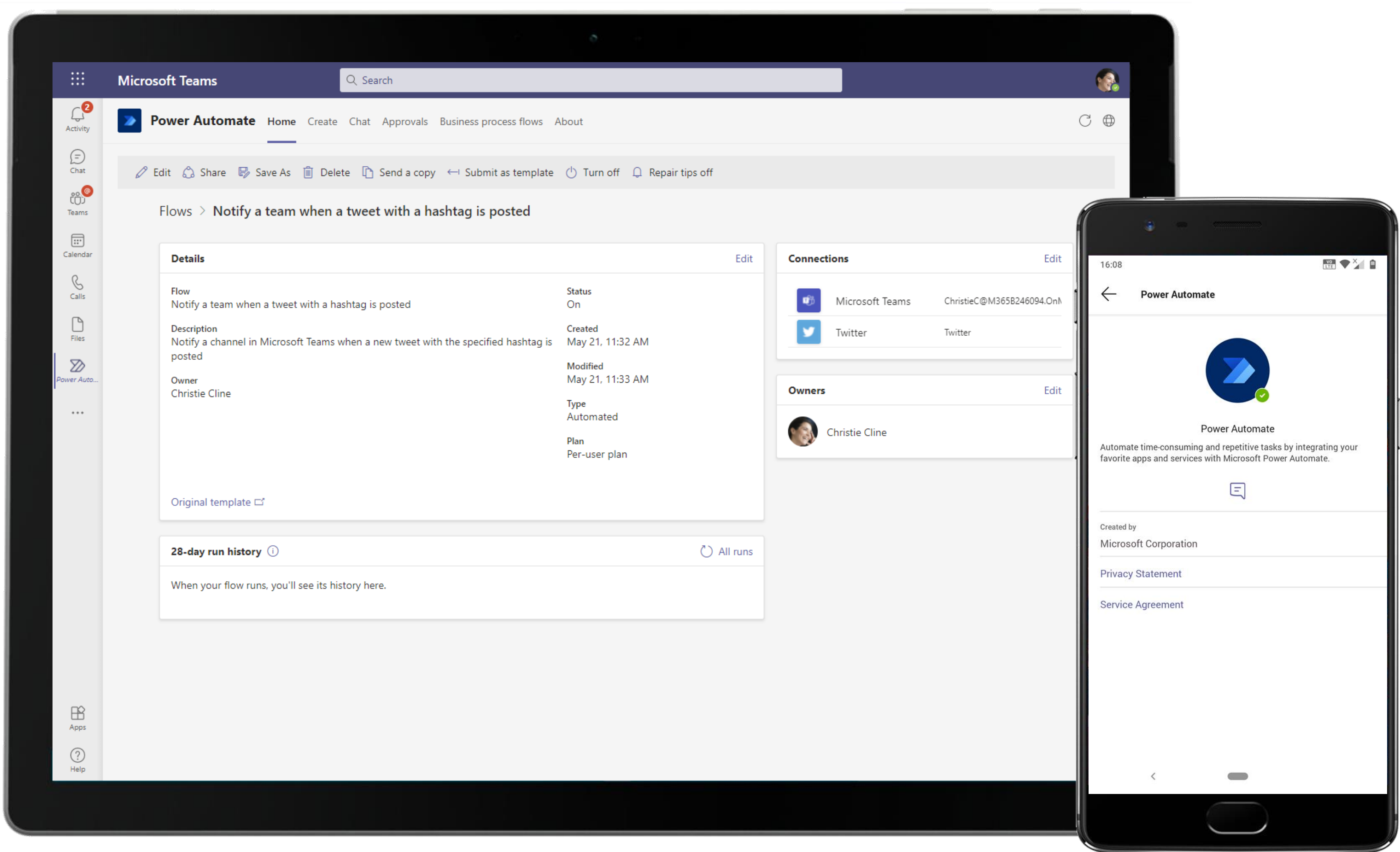
Which app integrations on Teams made it possible?



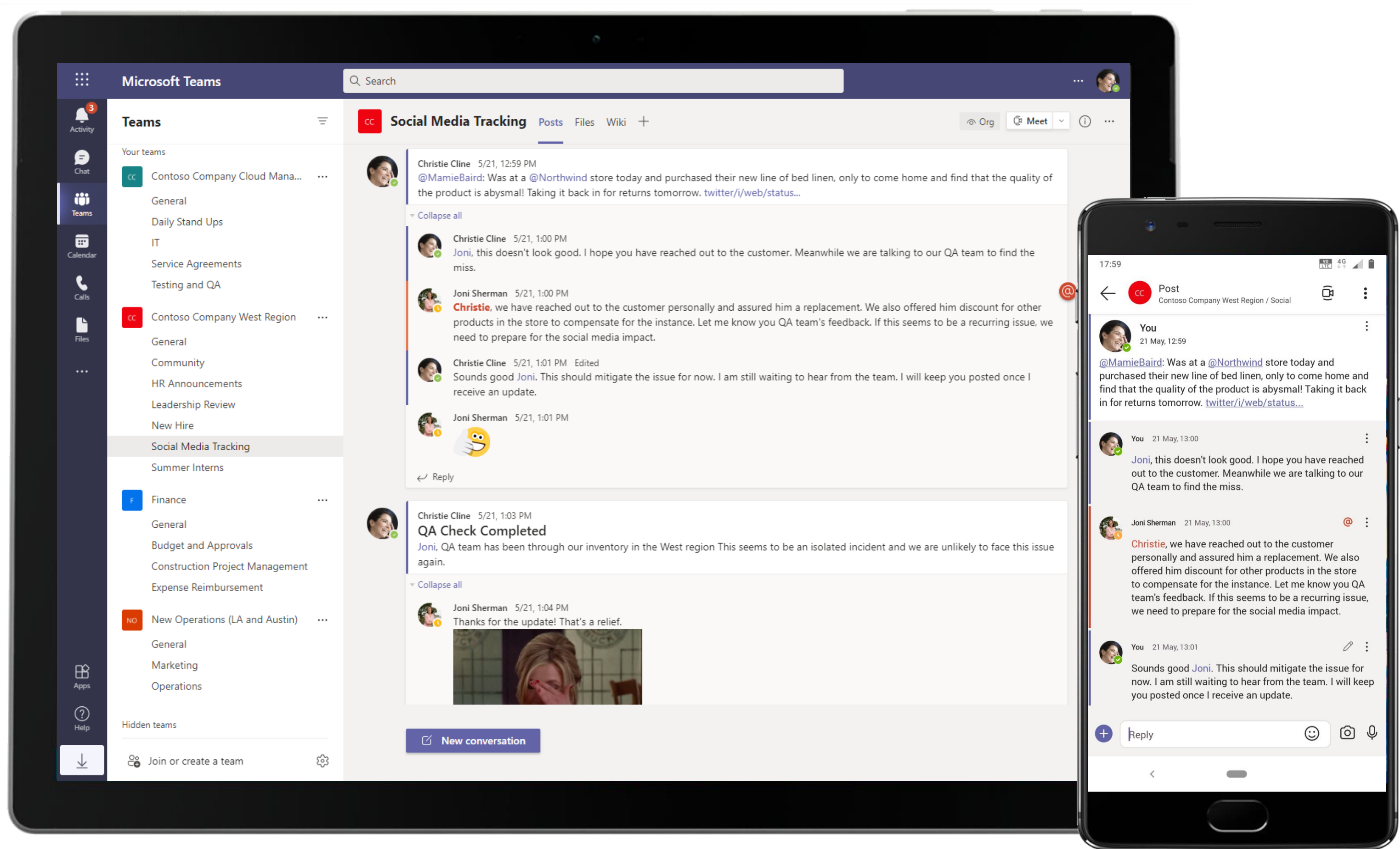
Power
Automate



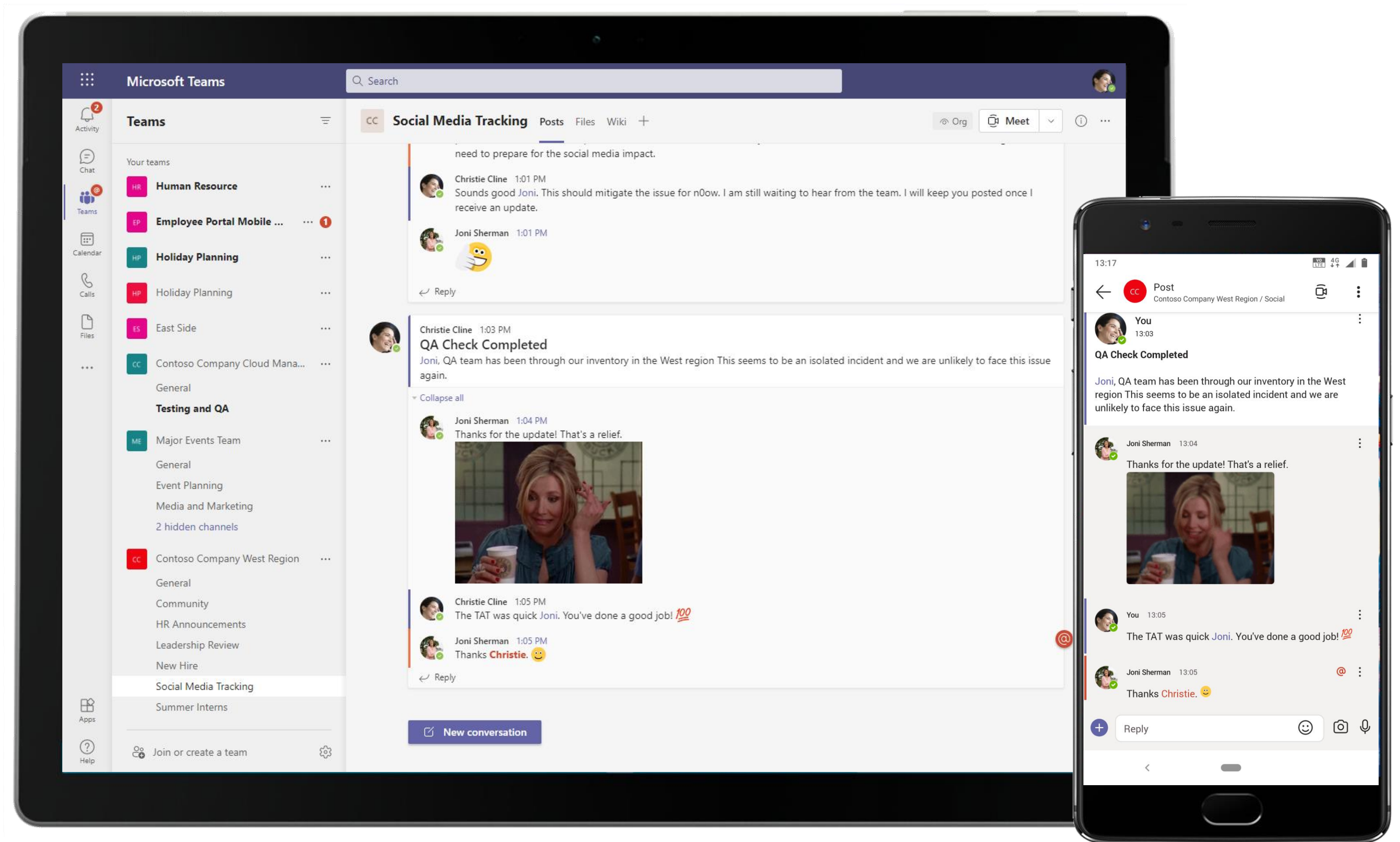
Power BI



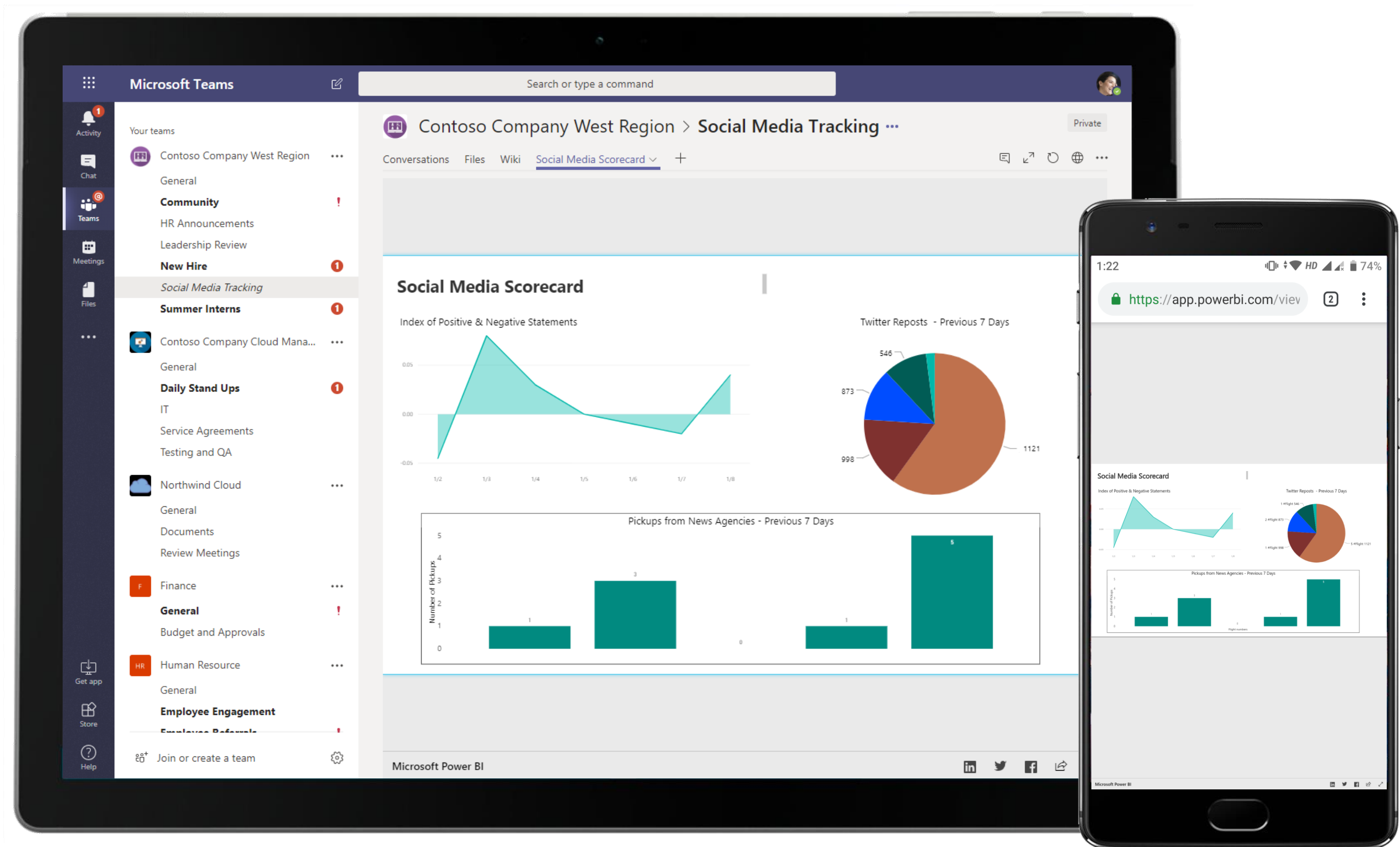
Configure the Twitter connector using Power Automate in Teams to manage and receive alerts you want. The Marketing Analyst uses Twitter to scan social media for negative comments related to the network downtime and discusses it with his team in the Social Media channel.



Microsoft Teams offer a seamless connector model, providing notifications and updates from third-party applications such as Twitter. The Marketing Analyst shares the notification in the channel and seeks customer complaint redressal.



Microsoft Teams conversations are threaded so users can reply directly in-context to specific conversations. The Analyst keeps the team updated in the same thread.



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



Information Technology

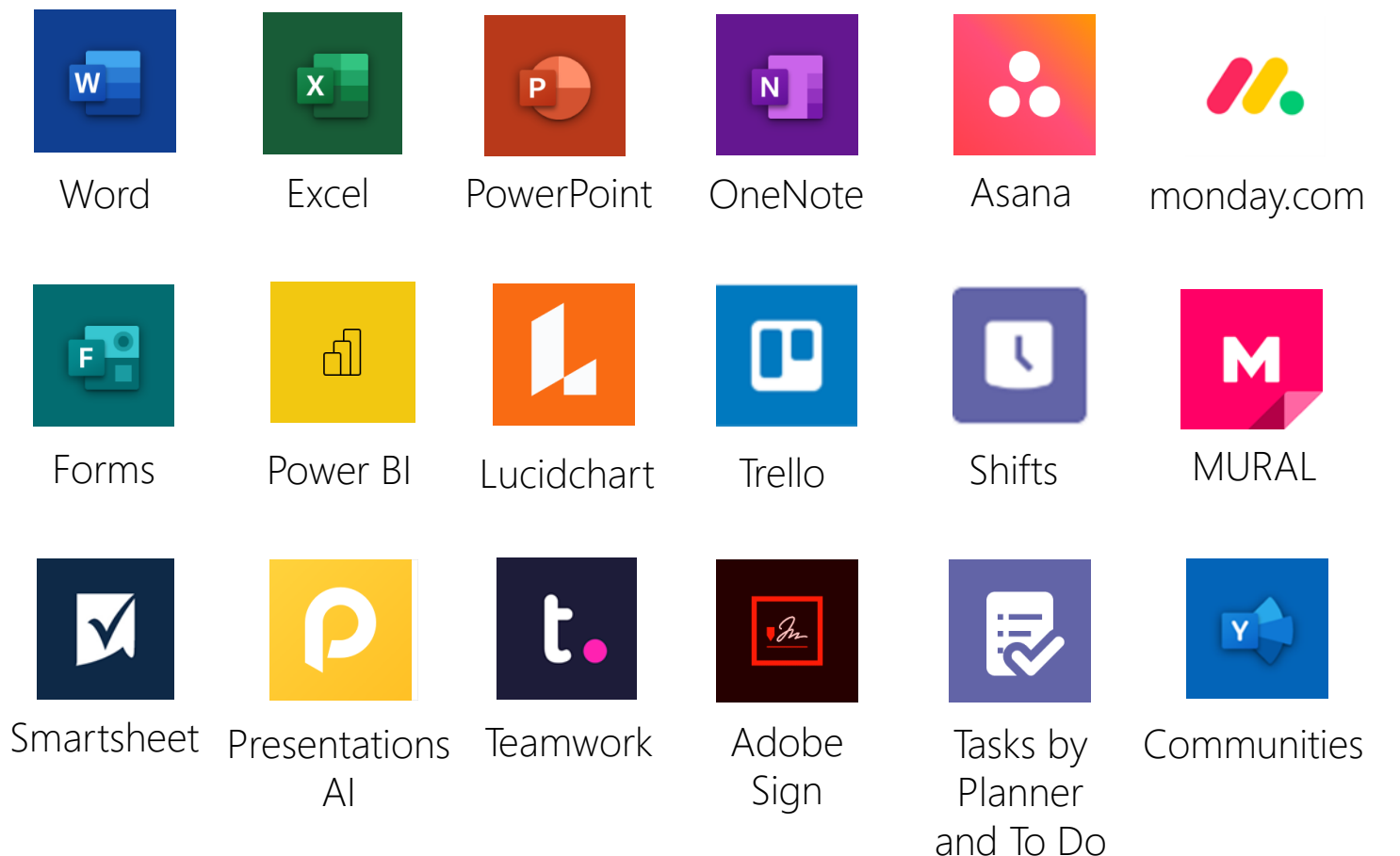
These scenarios will illustrate how Teams can help the IT team communicate effectively to ensure positive business outcomes.

Information Technology Superpowers in Teams

Capabilities and Features used...

- Participate in instant, open-channel communication
- Store documents within a cloud-enabled repository with Files
- Real-time, contextual file sharing and co-authoring
- Channel Tabs for everyone to stay on the same page
- Help securely collaborate with teammates using familiar applications all in a single place

Apps that enable an immersive experience in Teams



Meet the Business Decision Makers

Information Technology



IT Manager

"Prioritize. Plan. Execute! That's the only way systems can keep running. In our world, if the systems keep running, the business keeps running."

- Develop and implement IT policy and best practice guides for the organization
- Carry out regular checks on network and data security
- Identify and act on opportunities to improve software and systems
- Provide direction of IT utilization in the process



IT Engineer

"I enjoy getting to the root of the problem quickly, even better if I don't have to move away from my screen!"

- Procure network equipment and managing subcontractors involved with network installation
- Support organization staff in network connectivity problem and hardware issues
- Maximize network performance through ongoing monitoring network efficiency and security

Meet the Business Decision Makers

Information Technology



Developer

"A good programmer looks both ways before crossing a one-way street."

- Program, test and debug all web applications in collaboration with other programmers
- Collaborate with staff and teams to develop, format and deploy content
- Assist and support in the upkeep and maintenance of web sites



Engineering Manager

"I have Teams to help me stay organized through months and months of planning and execution."

- Direct, review and approve technology design and changes
- Coordinate projects with detailed plans to accomplish goals
- Direct the integration of technical activities
- Plan and direct the build, testing and operation of the product



Inventory Tracking

IT Manager

Scenario Walkthrough

One of the major challenges an IT team faces is inventory tracking, especially when IT assets are often moved around or replaced. A centralized system with spreadsheets maintained in the Files repository of an organization's Teams instance helps this team distribute a fresh batch of monitors and devices, while tracking their progress through open channel communication and a shared work order rather than multiple print-outs carried around by administrators.

- Posts an announcement that the new monitors and laptops have arrived and will be installed soon.
- Tracks replacement of devices using an inventory Excel spreadsheet.
- Handles discrepancies in the list by reaching out to employees via 1:1 chat.
- Uses Tasks by Planner and To Do to close out the device replacement task.

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

- Create inventory list quickly using Excel right inside Teams.
- Track replacement process with a shared spreadsheet in channels.
- Create, assign, monitor tasks with Tasks by Planner and To Do.
- Channel conversations help share updates in real-time with relevant members.

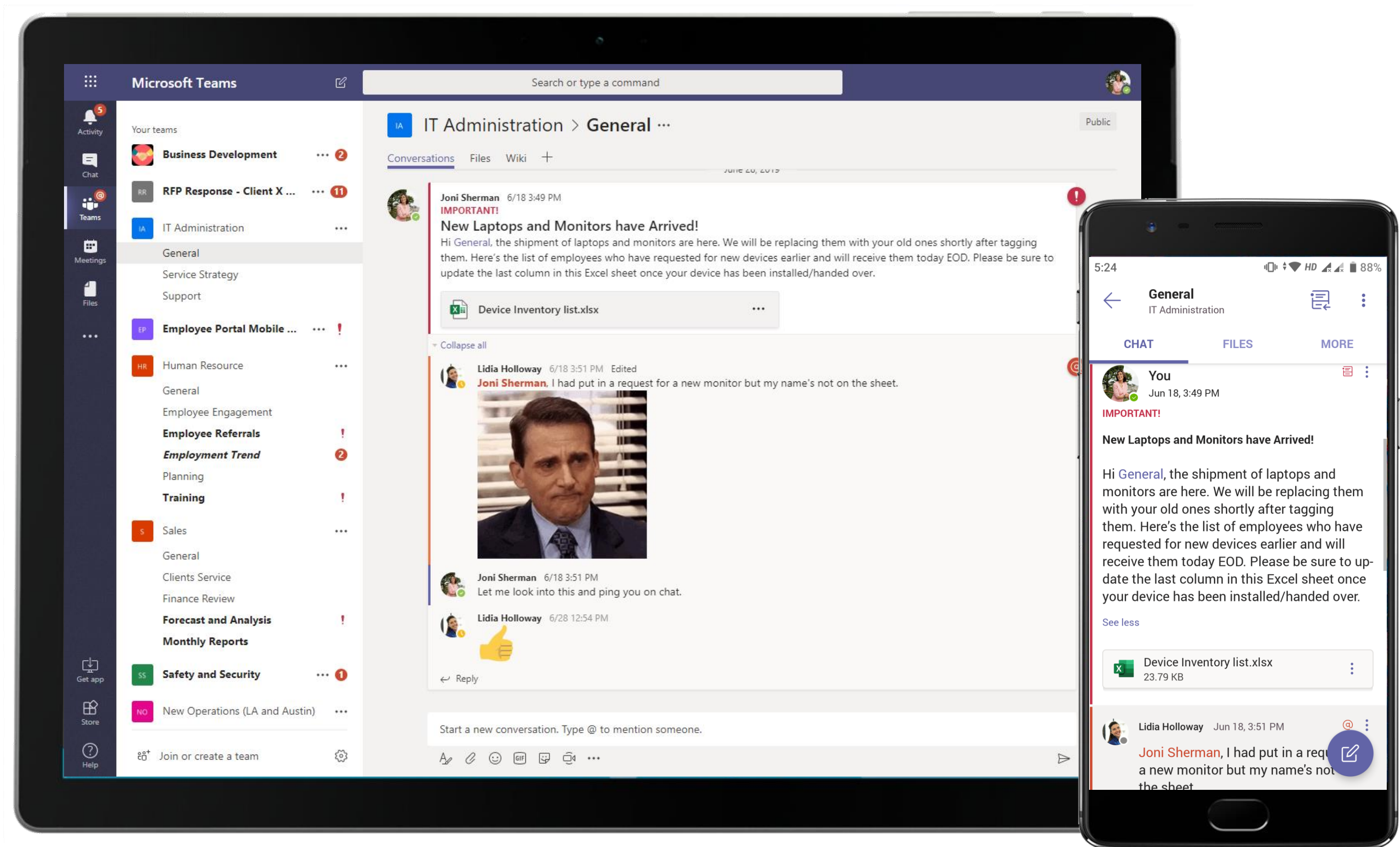
Which app integrations on Teams made it possible?



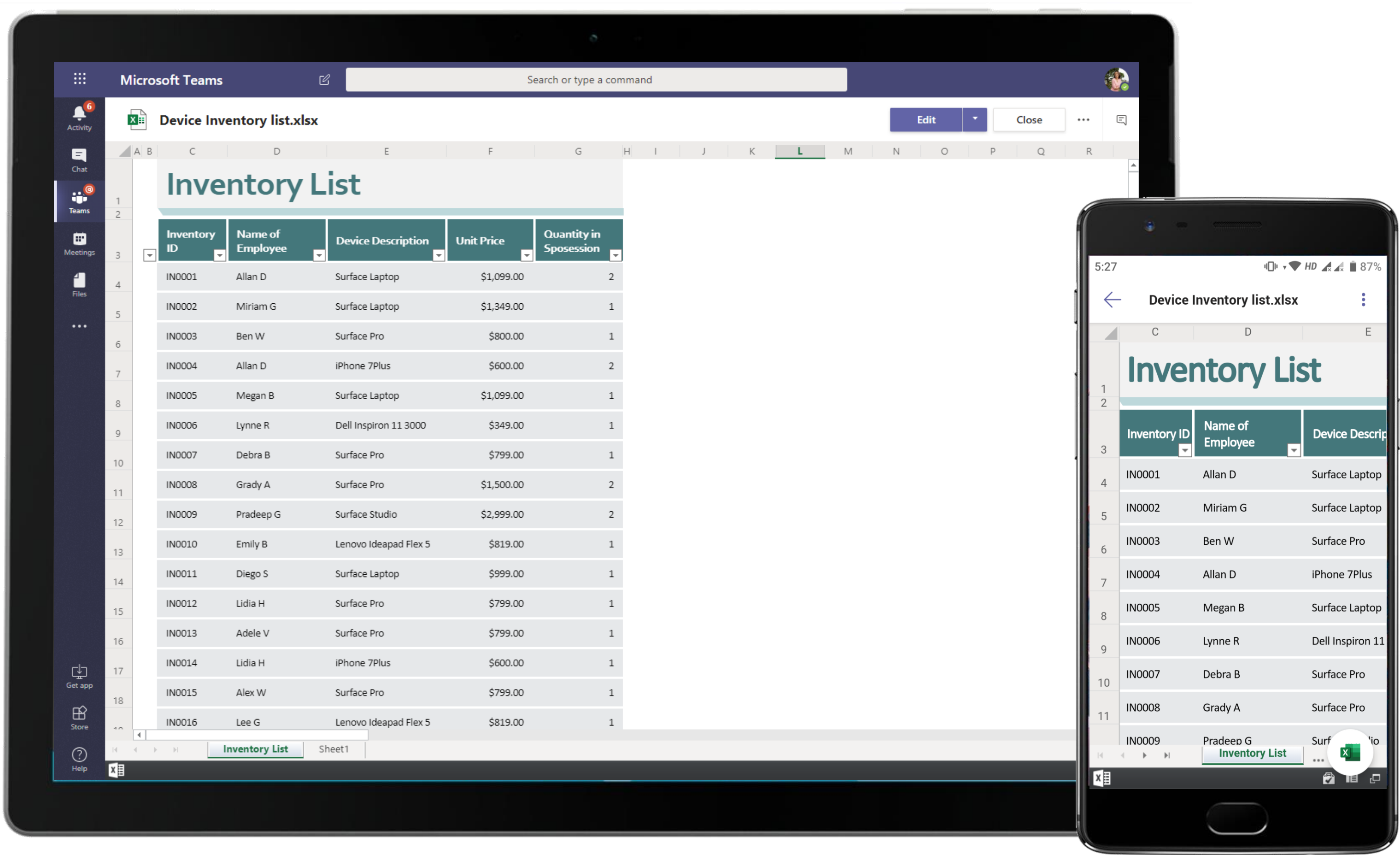
Excel



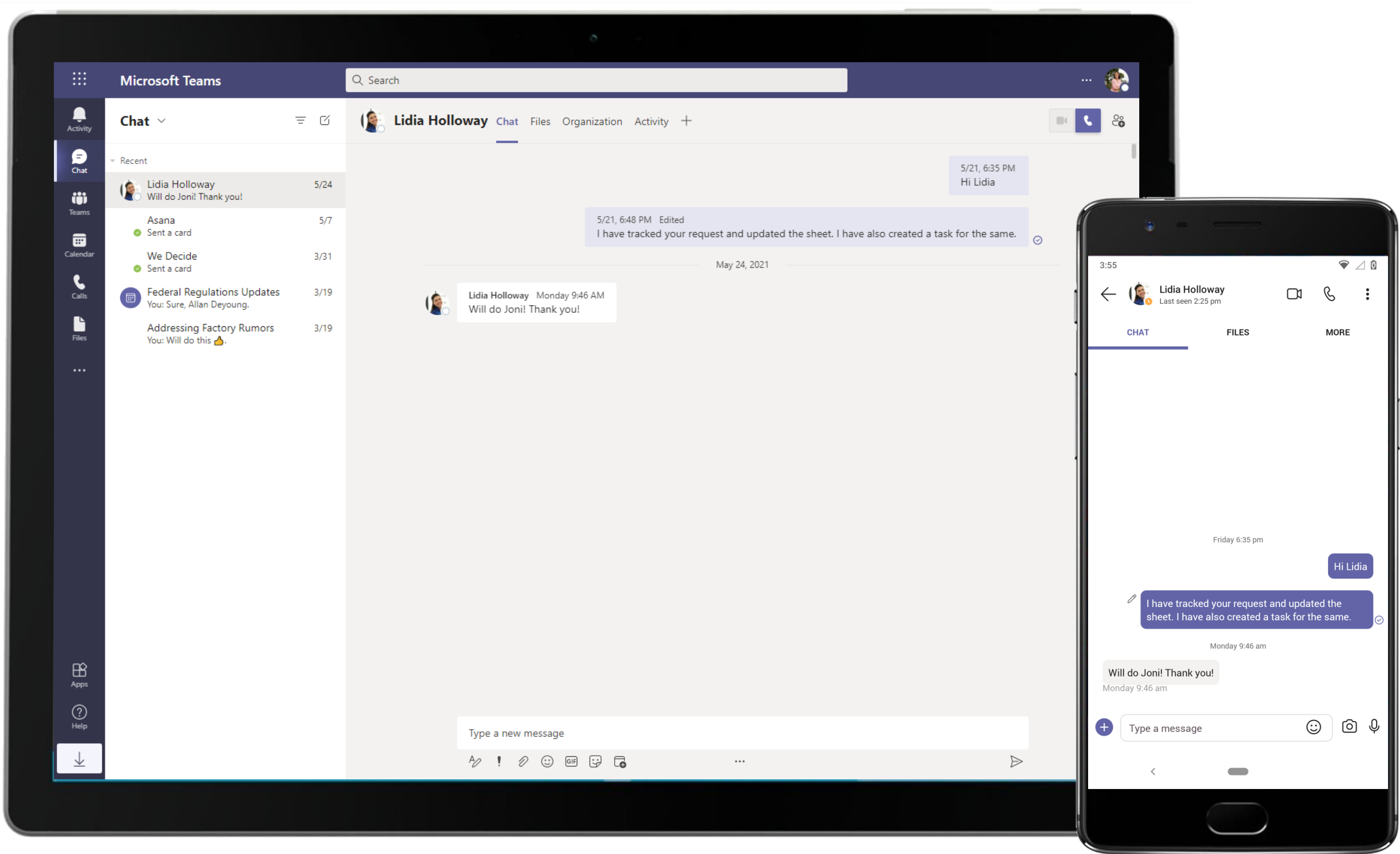
Tasks by
Planner
and To Do



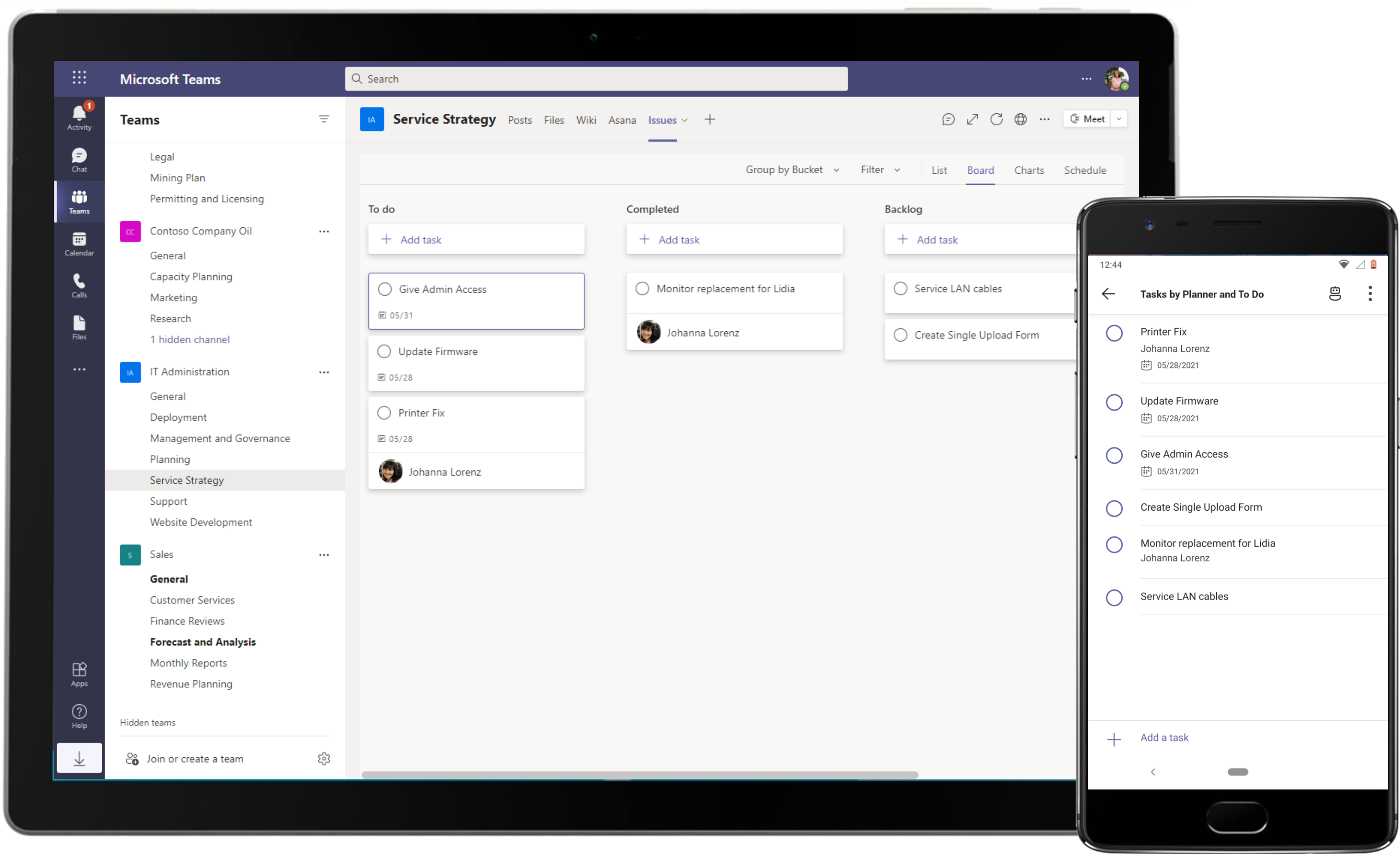
Use channel conversations to relay updates to team members. The IT Manager posts a quick update for team members regarding new devices that they are expecting.



Use Excel in Teams to compile data and maintain checklists. Excel in Microsoft Teams helps the IT team maintain a unified inventory list, complete with employees who need them.



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 IT Manager.



Assign, track and communicate tasks and milestones without having to switch apps using Tasks by Planner and To Do inside Teams. The Tasks by Planner and To Do app helps the IT Manager track and close tasks related to the disbursement of devices.



Firmware Updates

IT Engineer

Scenario Walkthrough

The Contoso IT team is preparing for a big firmware update for their project management software. Microsoft Teams offers all the tools and security the team needs to communicate and collaborate efficiently.

- Views an announcement marked important to do a status check on the firmware update.
- Responds to the post that a release doc needs to be prepared.
- Creates and prioritizes tasks to ensure that the firmware updates are released on time.
- Joins a team meeting to sketch out the details of the document.
- Works with team member to create a final version of the release document.

How did Teams help the IT Engineer execute her roles and responsibilities?

- Document collaboration using the Files repository.
- Powerful document creation and editing with the complete canvas and toolset of Word.
- Effective channel communication with @mention feature for quick updates.
- Clearly organized and prioritized tasks with Trello.

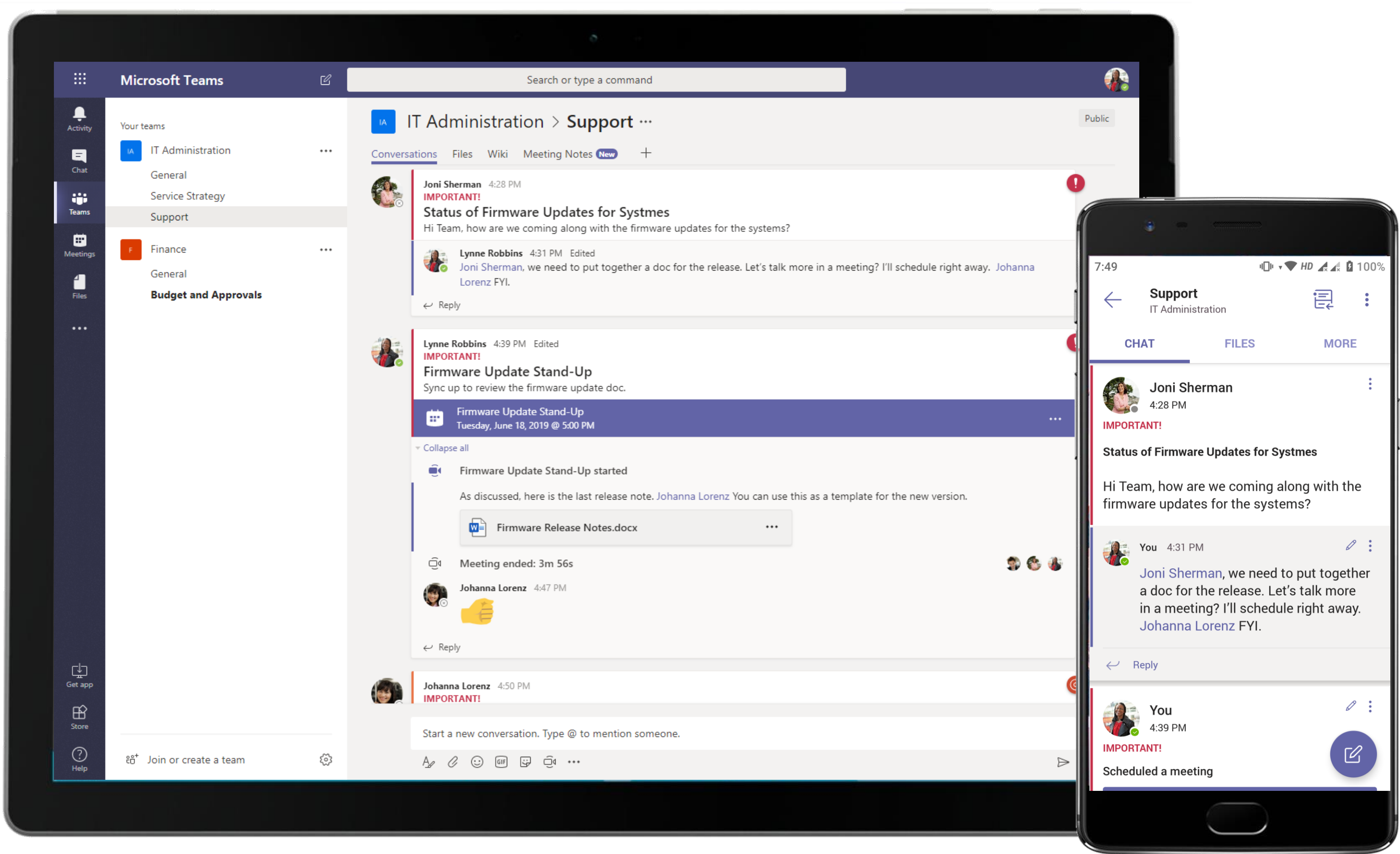
Which app integrations on Teams made it possible?



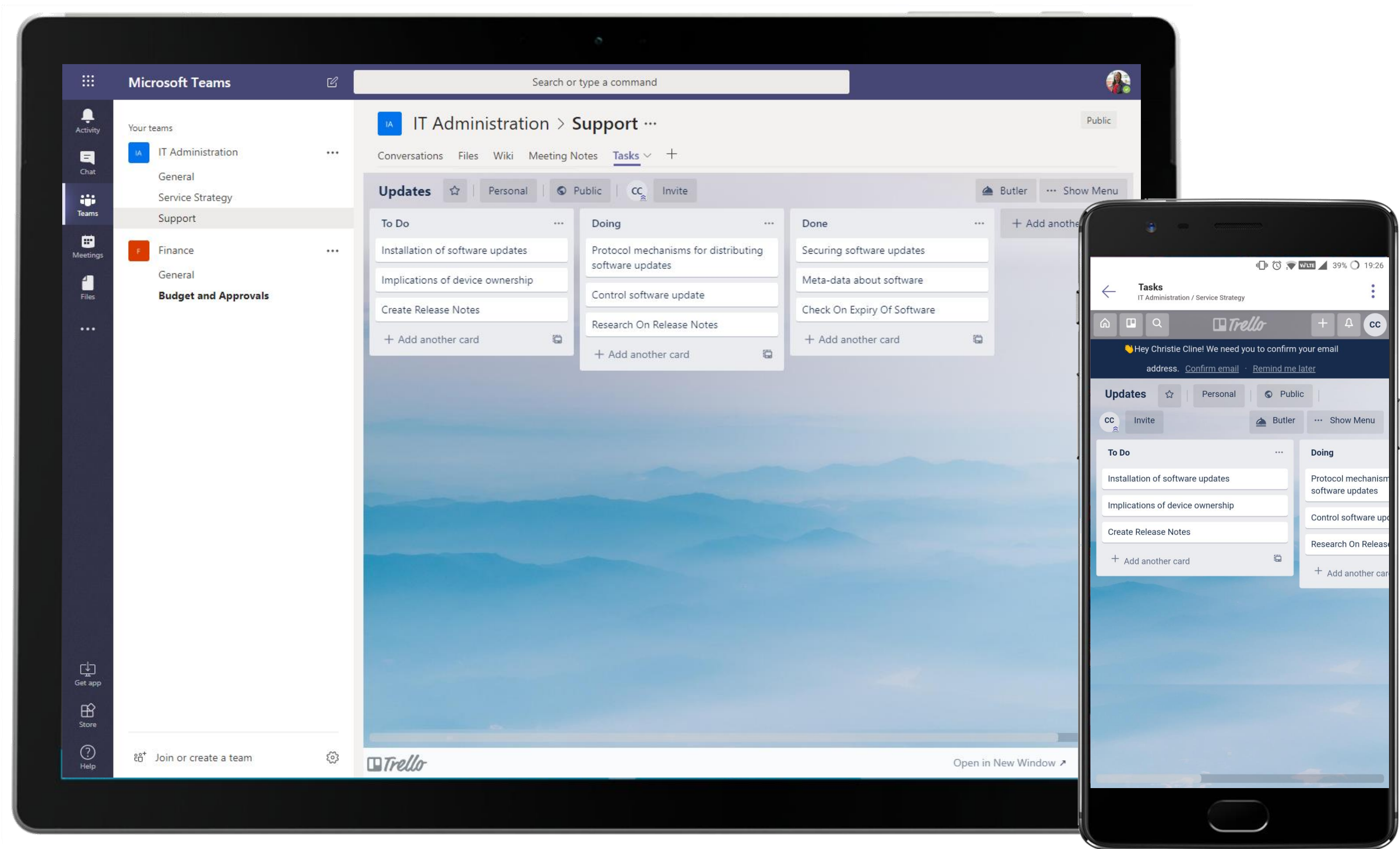
Word



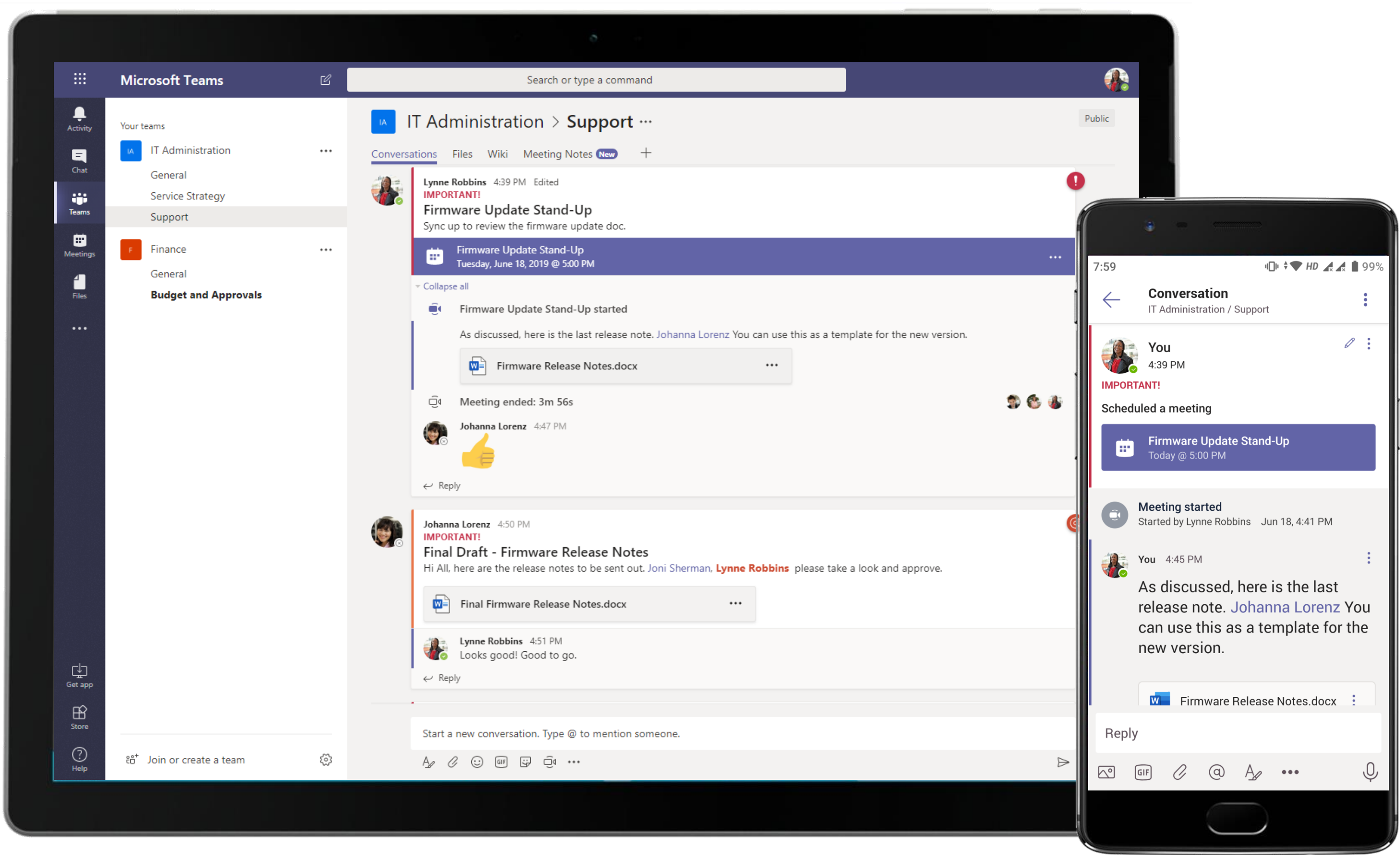
Trello



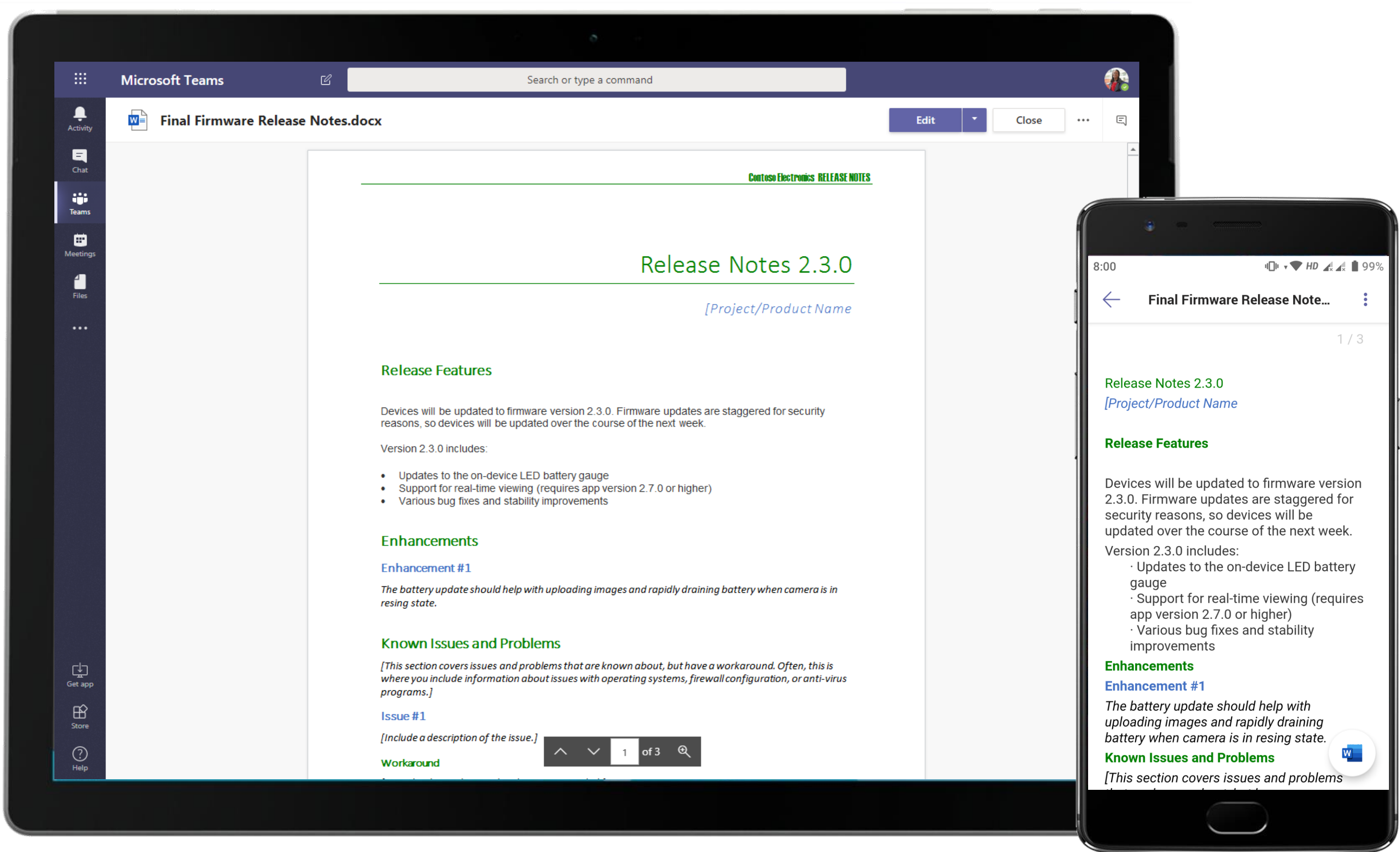
Collaborate with your team through channel communications using @mention to tag required personnel and keep conversations around a specific topic in a single thread. The team schedules meetings and shares files within the same thread.



Speedy plan mobilization using task assignment and delegation is done best using Trello. Trello in Teams allows the IT Manager to track tasks, see assignments, status and manage workflows without leaving Microsoft Teams.



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



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



Troubleshooting & Repairs

IT Engineer

Scenario Walkthrough

Meetings are an everyday event for Contoso employees. For an IT Engineer, it's a great way to troubleshoot problems in employee devices remotely, just allowing her to support Contoso's global workforce with ease.

- Receives alert in channel where an employee has raised an issues pertaining to a printer access issue.
- Sends a 1:1 chat message to the employee to understand the situation better.
- Gets on a Teams call with the customer to troubleshoot the issue.
- Requests permission to access employee's desktop over Teams.
- Troubleshoots the issue and installs updates to solve the issue.
- Closes the ServiceDesk Plus Cloud ticket in the channel.

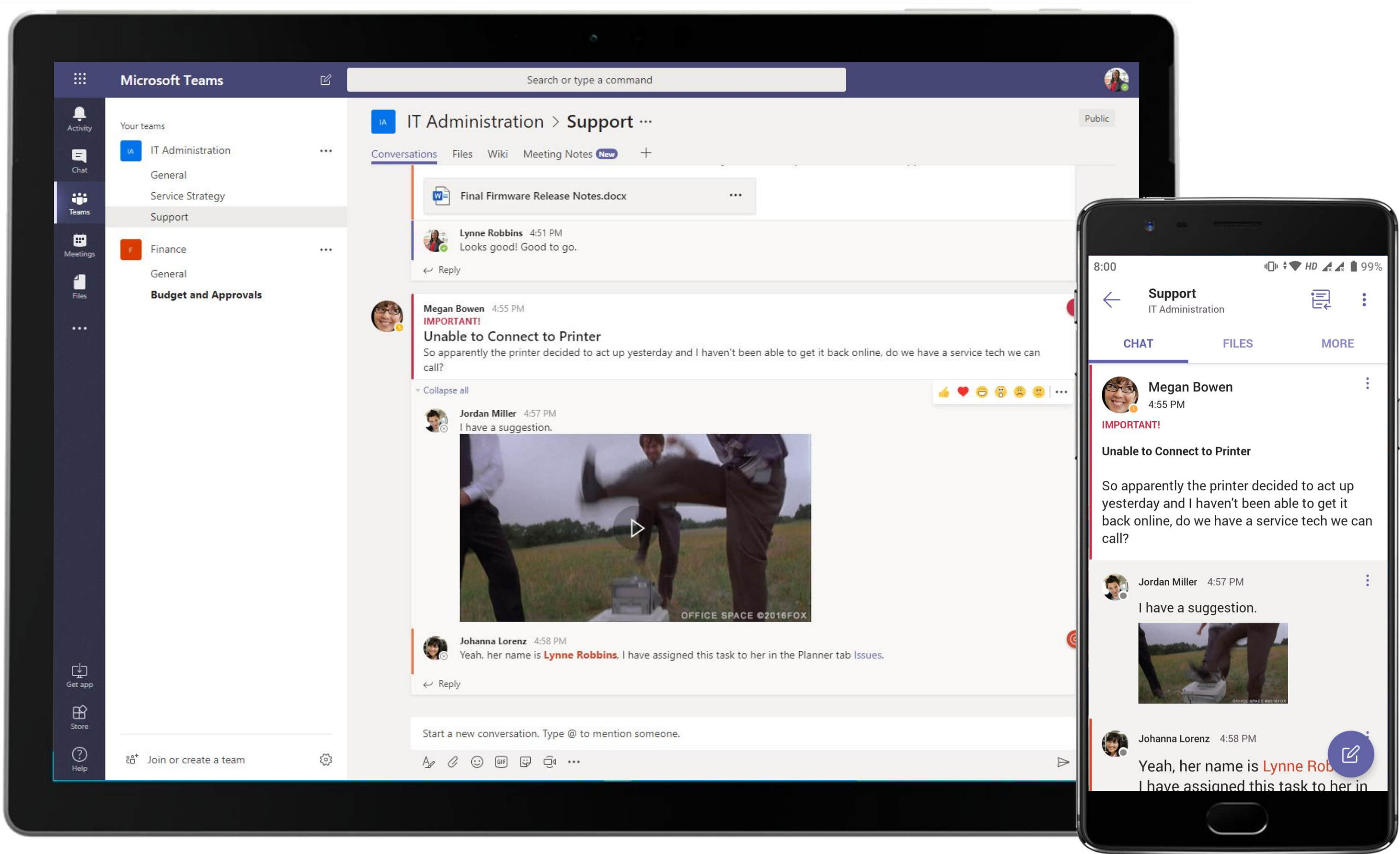
How did Teams help the IT Engineer execute her roles and responsibilities?

- Use a dedicated team to log tickets and initiate conversation.
- Personal 1:1 and channel conversations to gain clarity on the issue with Files tab to store documents.
- Secure meeting calls with screen share right inside Teams.
- Use ServiceDesk Plus Cloud to log tickets and initiate a conversation.

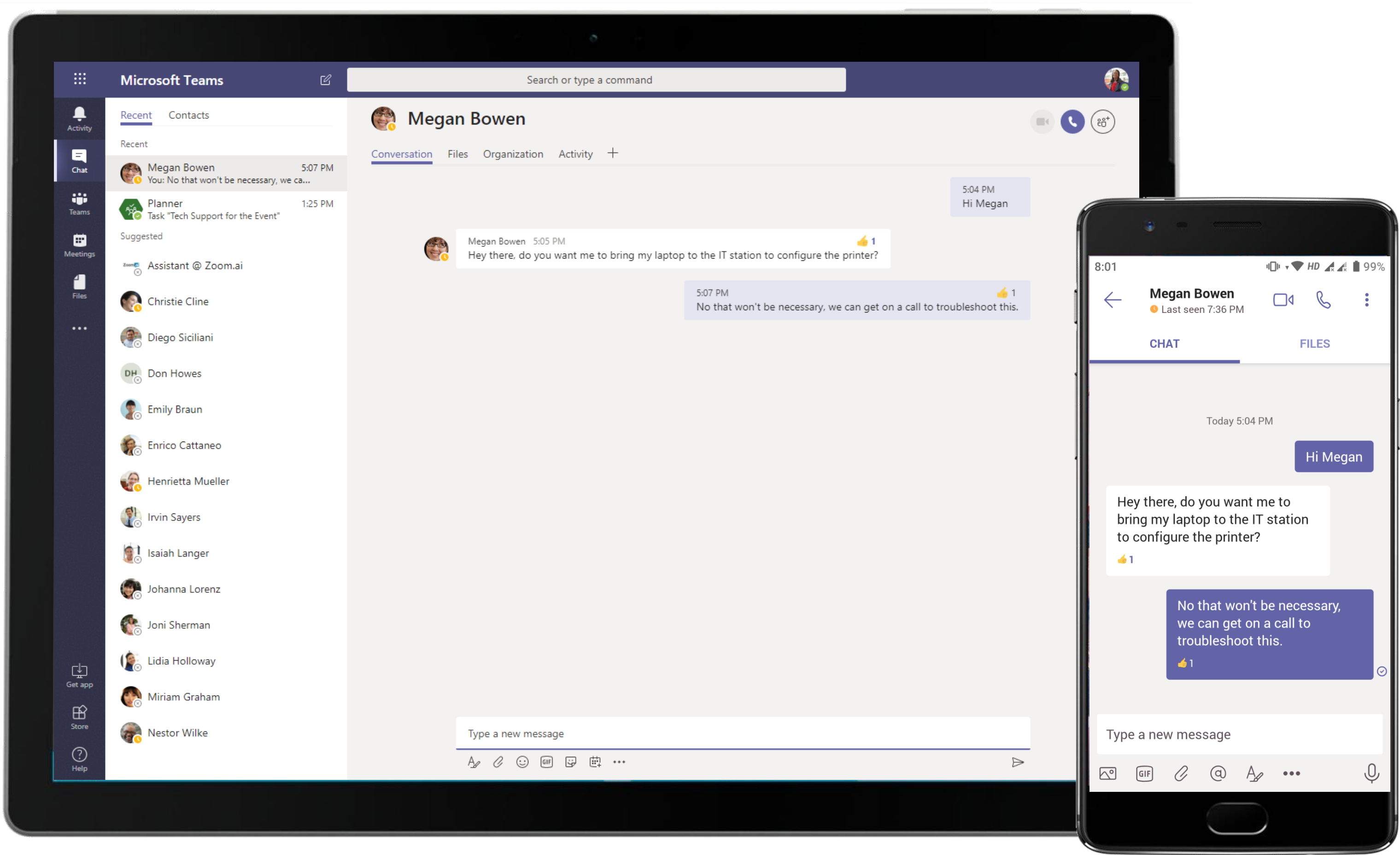
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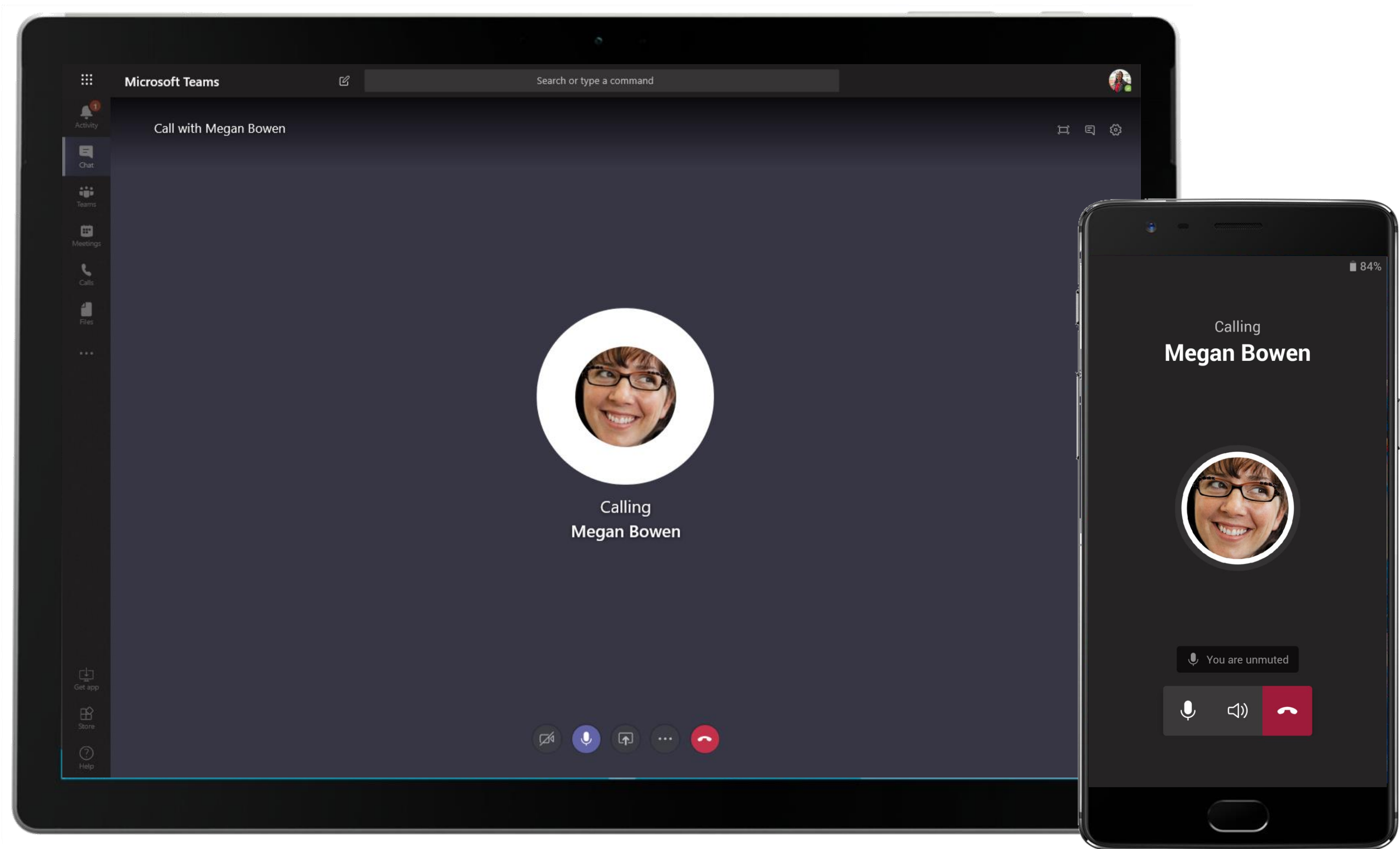
ServiceDesk
Plus Cloud



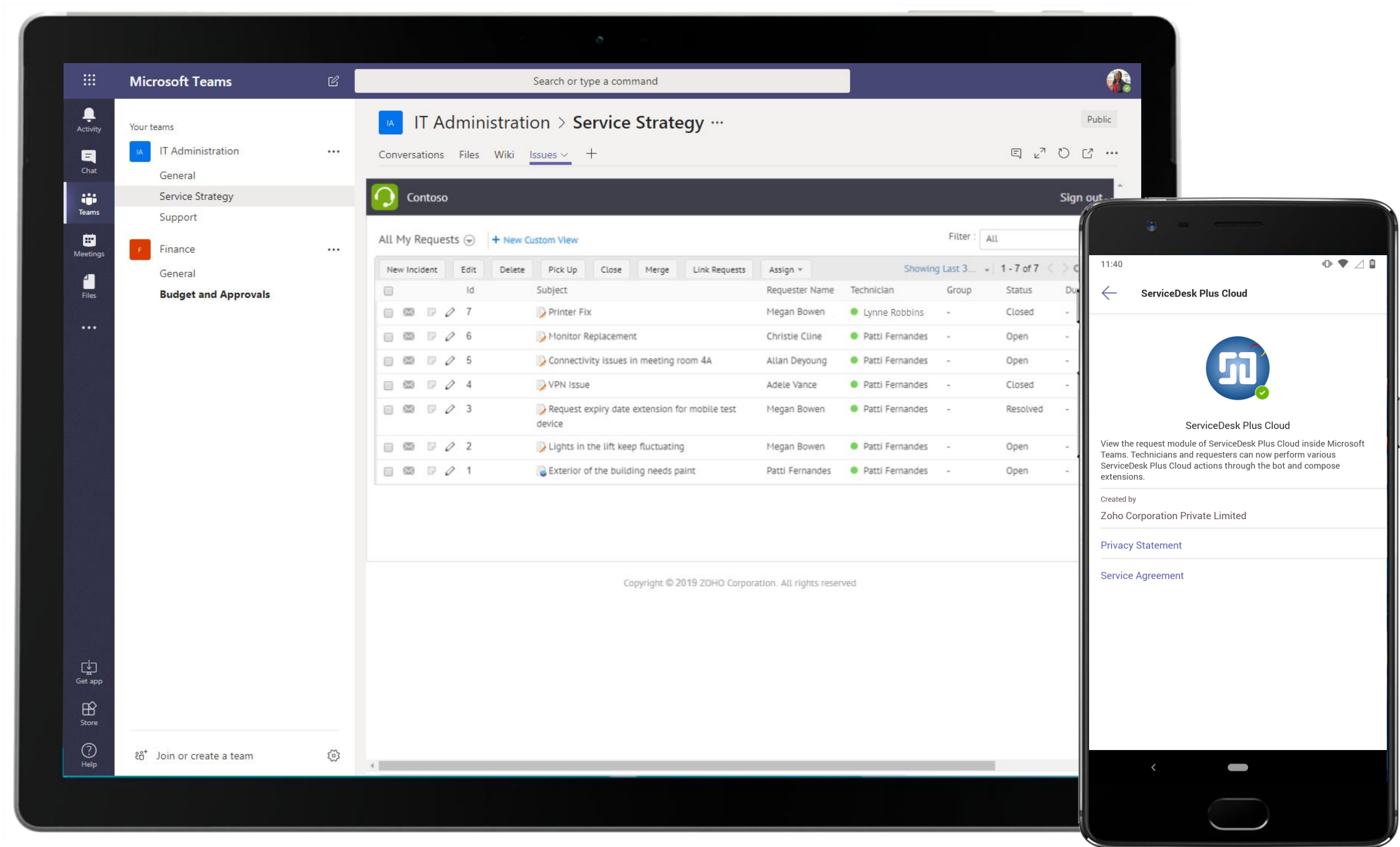
Not sure whom to reach out to when you need support? The IT Admin team at Contoso has Support channels (per site or department) for team members to reach out to them and engage for quicker resolution of queries.



1:1 chat conversations can always turn into a call, according to the participants' convenience. The engineer and the employee opt for a call to troubleshoot the issue.



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



Use ServiceDesk Plus to accomplish a host of IT service desk management tasks, such as assigning, picking up, editing, deleting, and linking tickets—all from within Microsoft Teams.



Developing a Mobile Application

Engineering Manager

Scenario Walkthrough

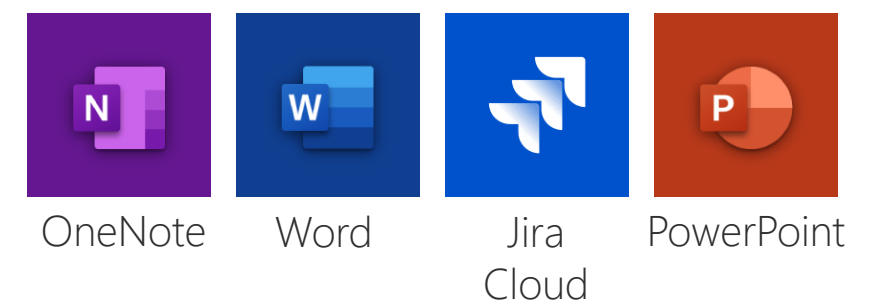
Contoso decides to build a mobile application as a counterpart of their employee desktop portal. The Contoso IT team comes together to collaborate over Teams and the Engineering Manager, who's spearheading the project, uses her workspace to stay updated with development tasks.

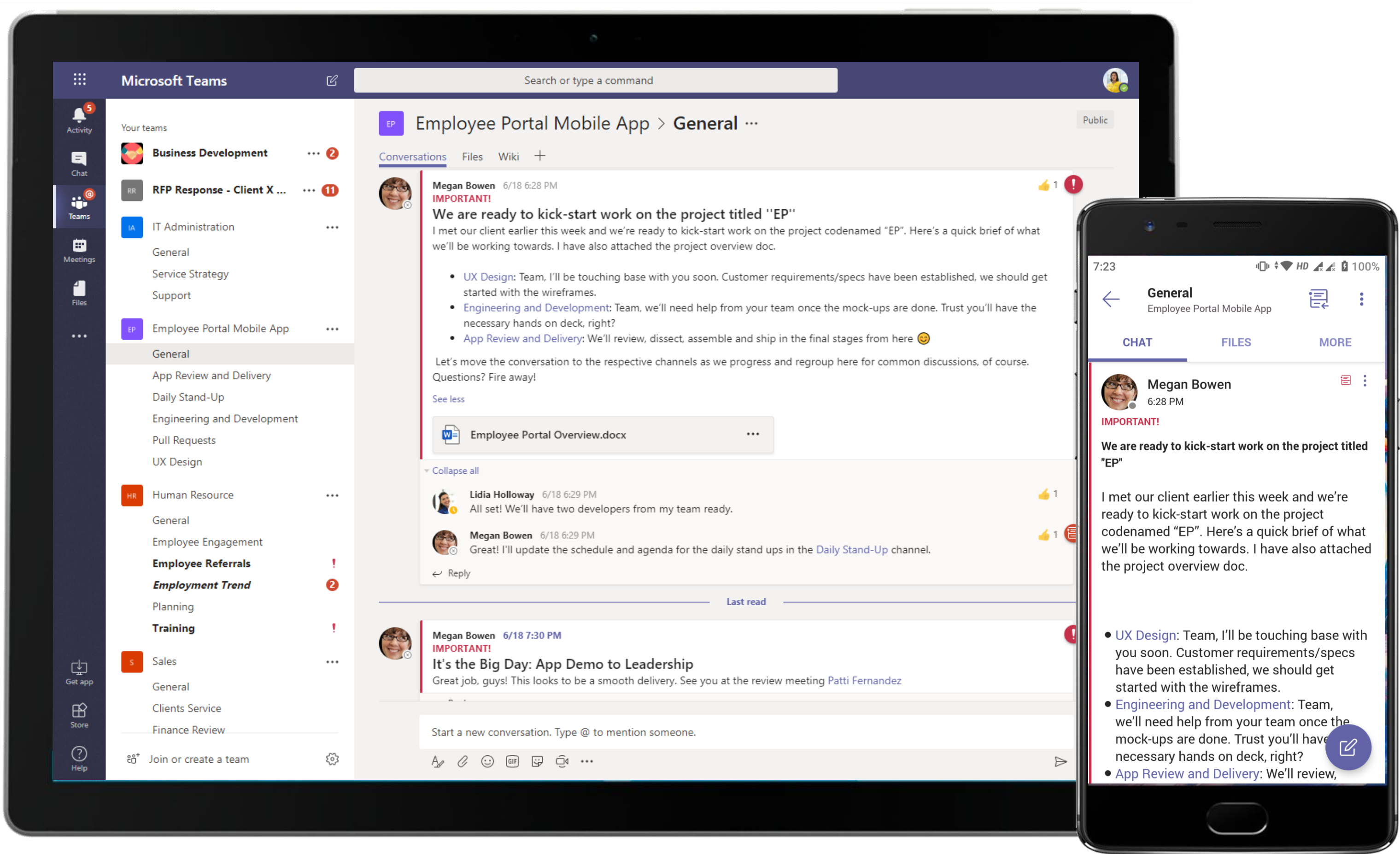
- Posts the spec document and discusses the objective of the project.
- Sets up daily stand up and weekly meetings in exclusive channel.
- Sets up Sprints, along with other project baselines.
- Developers post bug details and use channel communication to discuss these issues with the rest of the team.
- Engineering Manager stays updated with tasks, deadlines and bugs and communicates with team members to resolve issues over Teams.

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

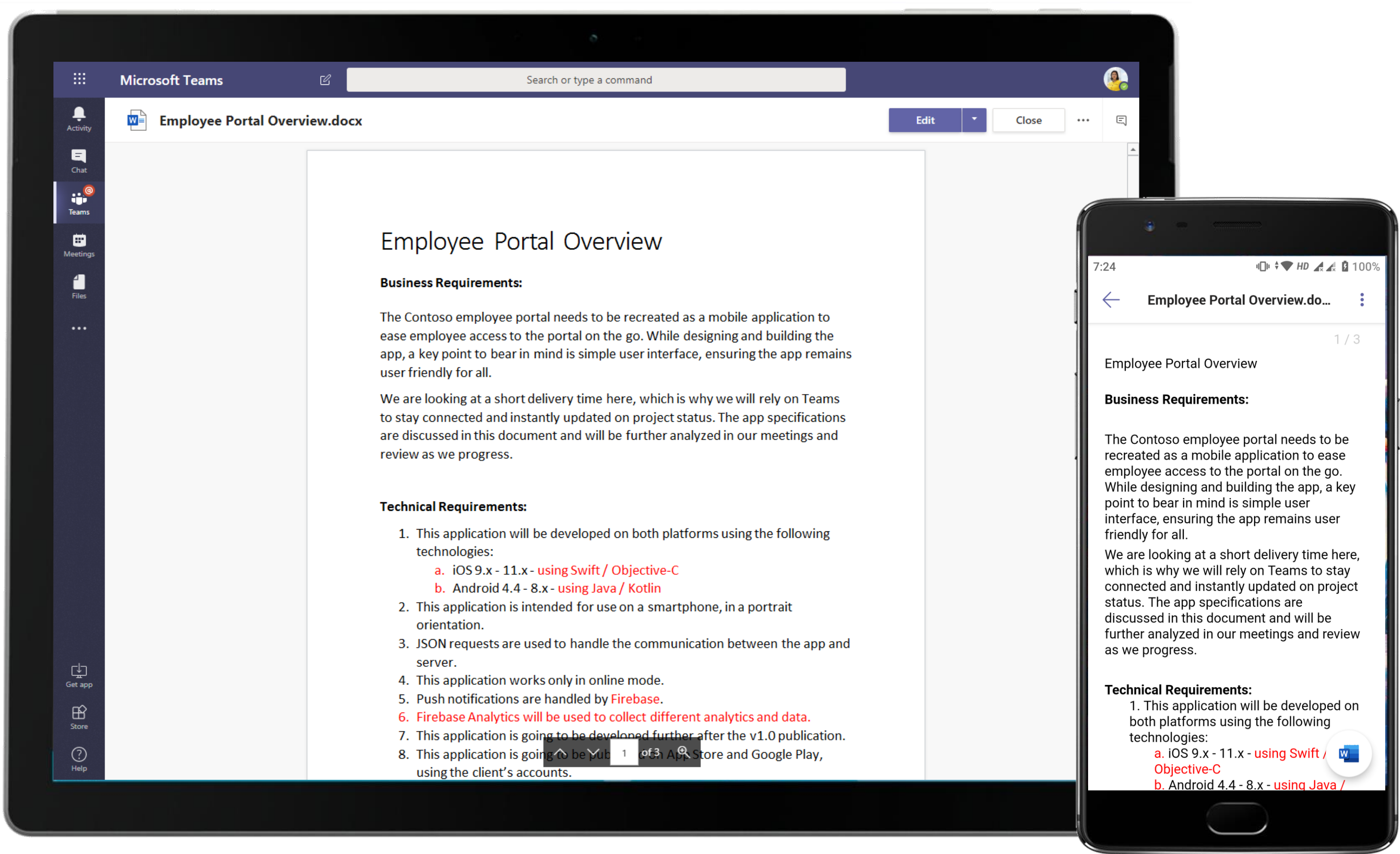
- Integrated Office 365 apps like Word and OneNote help powerful document creation.
- Dynamic impactful visual presentations with PowerPoint.
- Integrated Jira Cloud and other project tracking applications help the manager and team members keep track of goals.

Which app integrations on Teams made it possible?

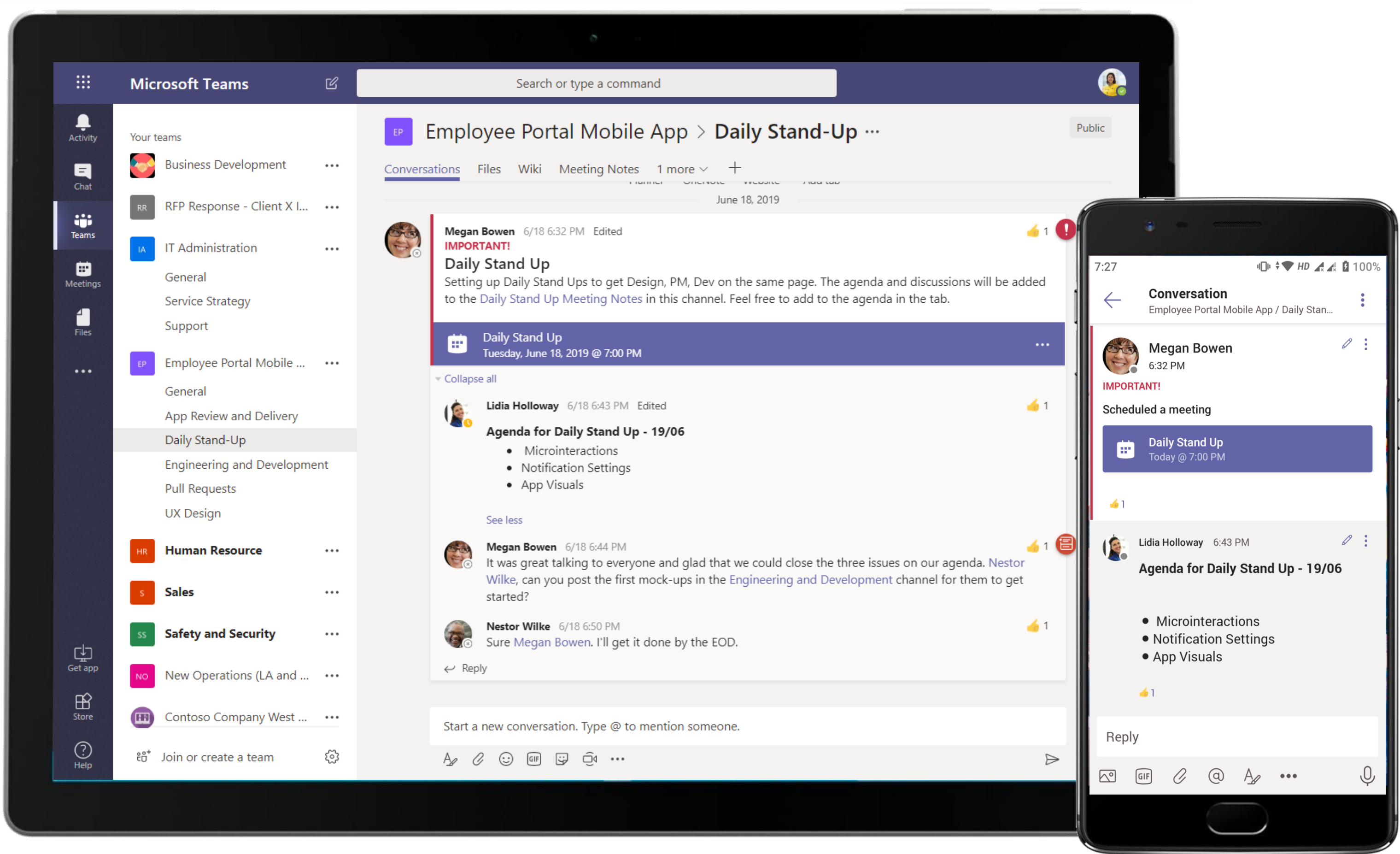




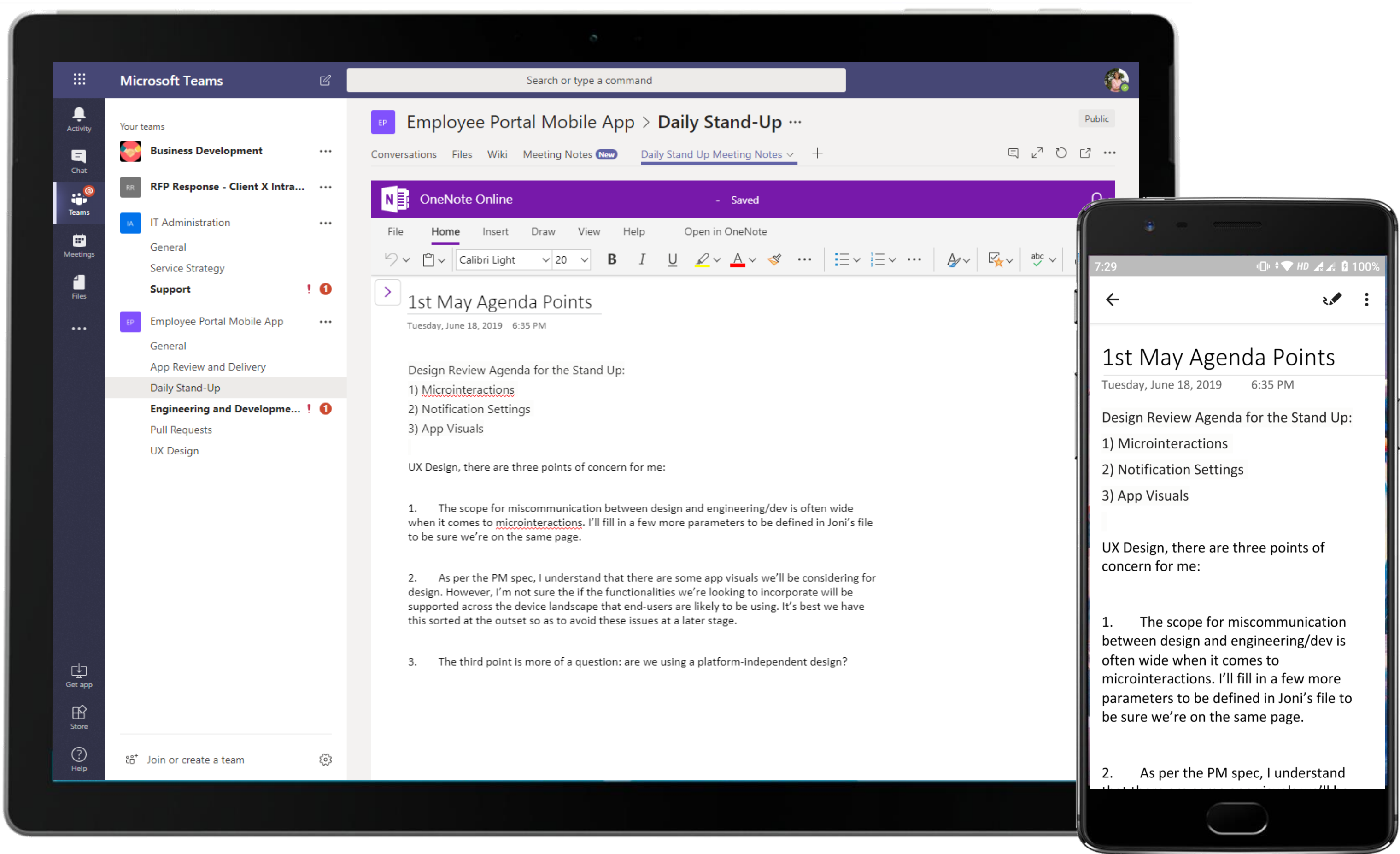
Use channel conversations to relay updates to team members and begin a process flow for task completion. The Engineering Manager kick-starts a process flow and defines the channels and participants that will take the process forward.



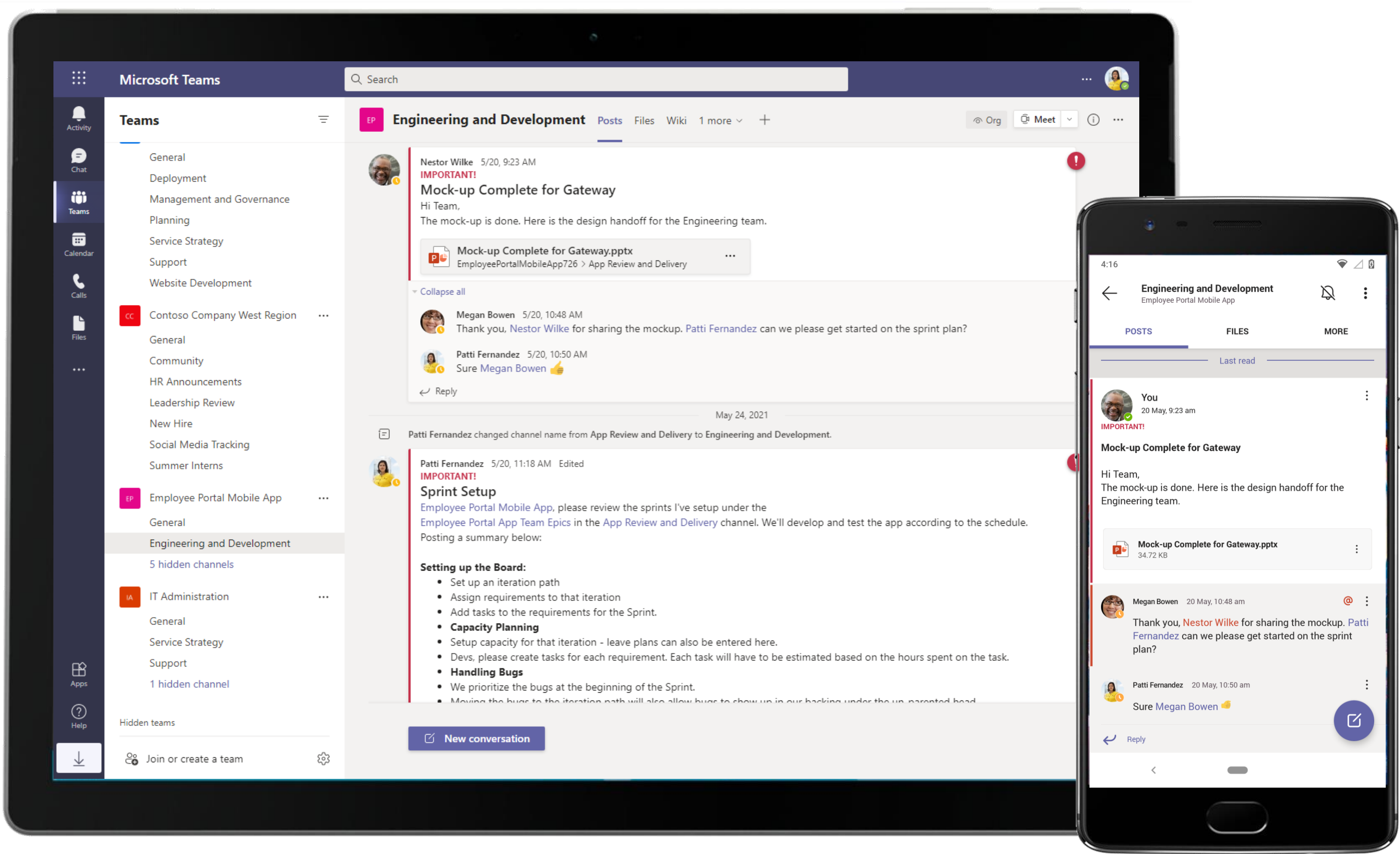
She collaborates with the Product team and shares her spec doc within the channel conversation. The spec is a Word document containing the project details for team members. This provides shared context to the entire team.



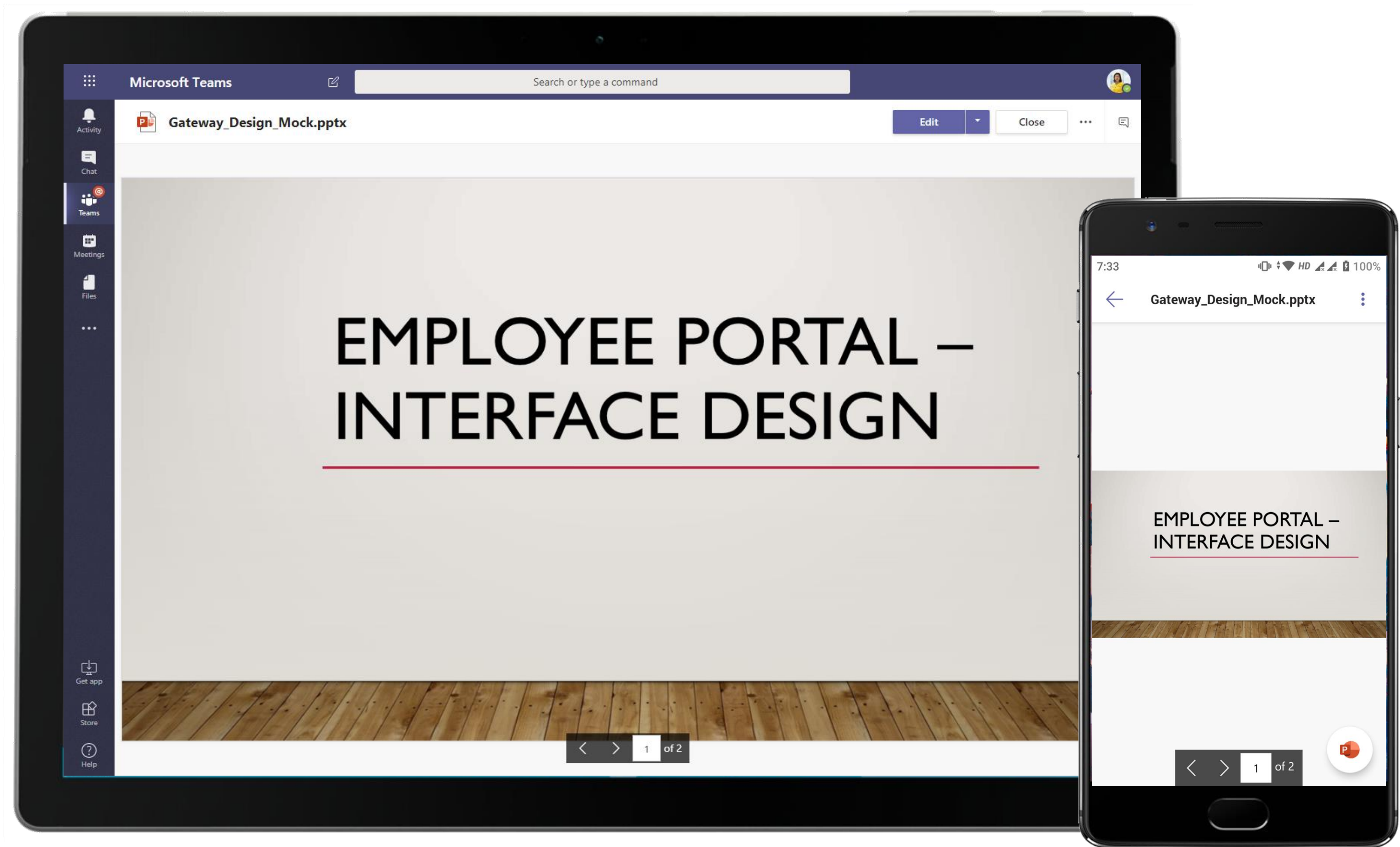
Easily schedule meetings and find the best available times for invitees through the native scheduling calendar. The Manager uses this feature to set up a daily team sync. Remote team members join the stand-up through online meeting.



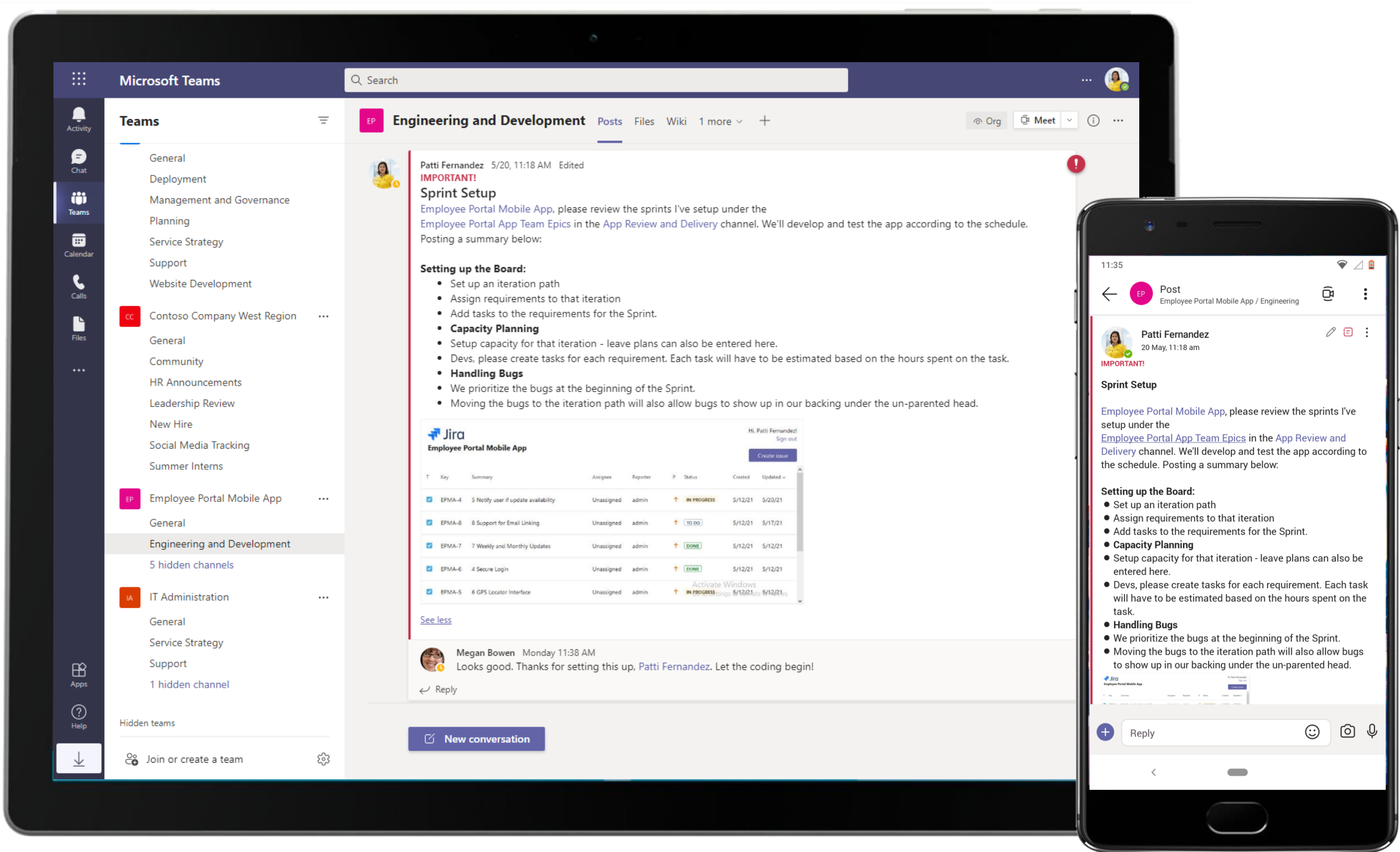
Collaborative and powerful document creation with OneNote in Microsoft Teams. Quickly disseminate meeting outcome, notes and action items among team members with OneNote tabs that can be pinned to any channel.



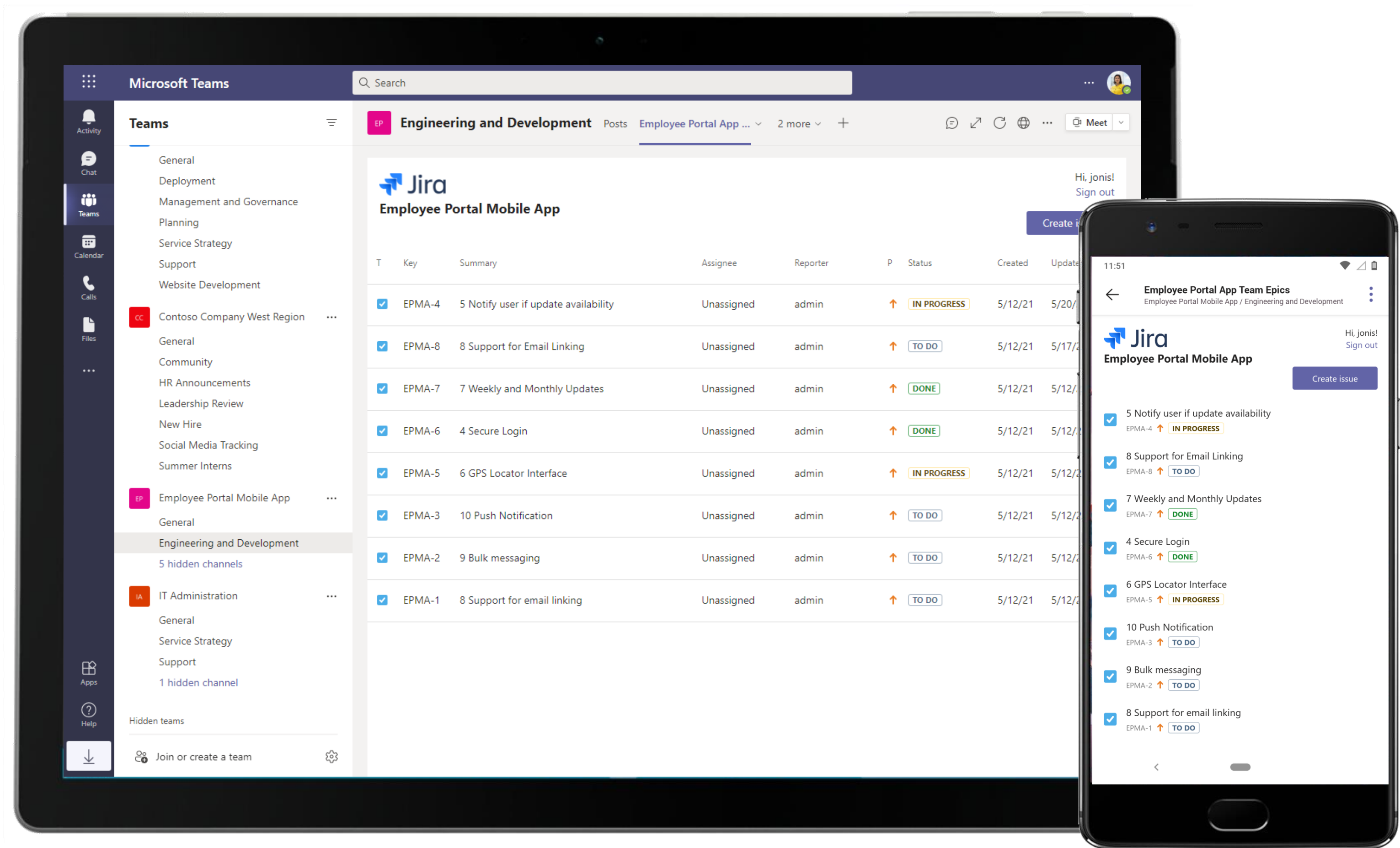
The conversations progress to exclusive channels where team members focus on tasks specific to the current lifecycle of the project. Channels provide the much-needed structure to ensure areas of the project keep moving in parallel.



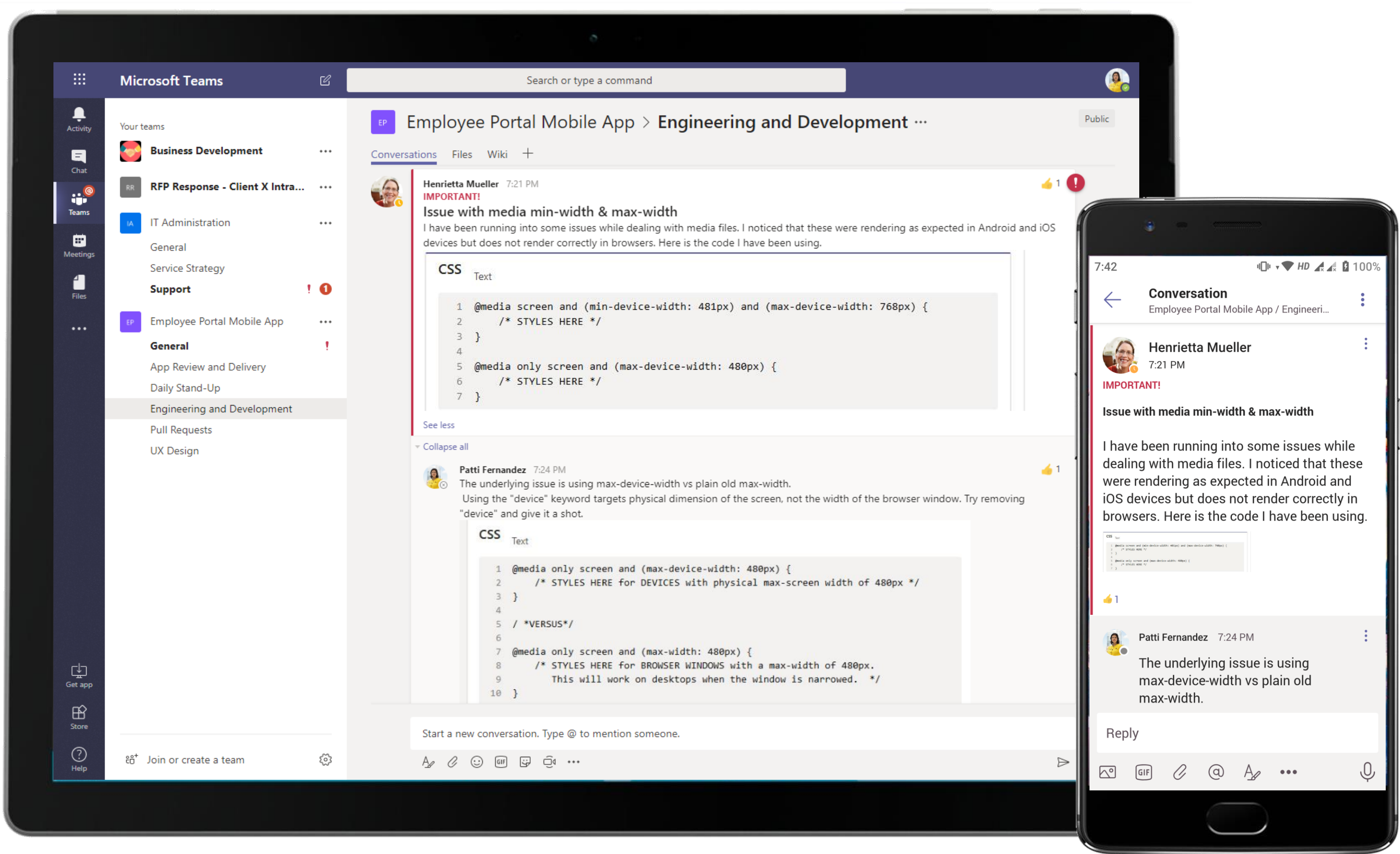
Store and share important files within a protected, cloud-enabled repository with Files. Design documents such as the PowerPoint containing mocks of the app and spec documents are housed here for the team's easy access.



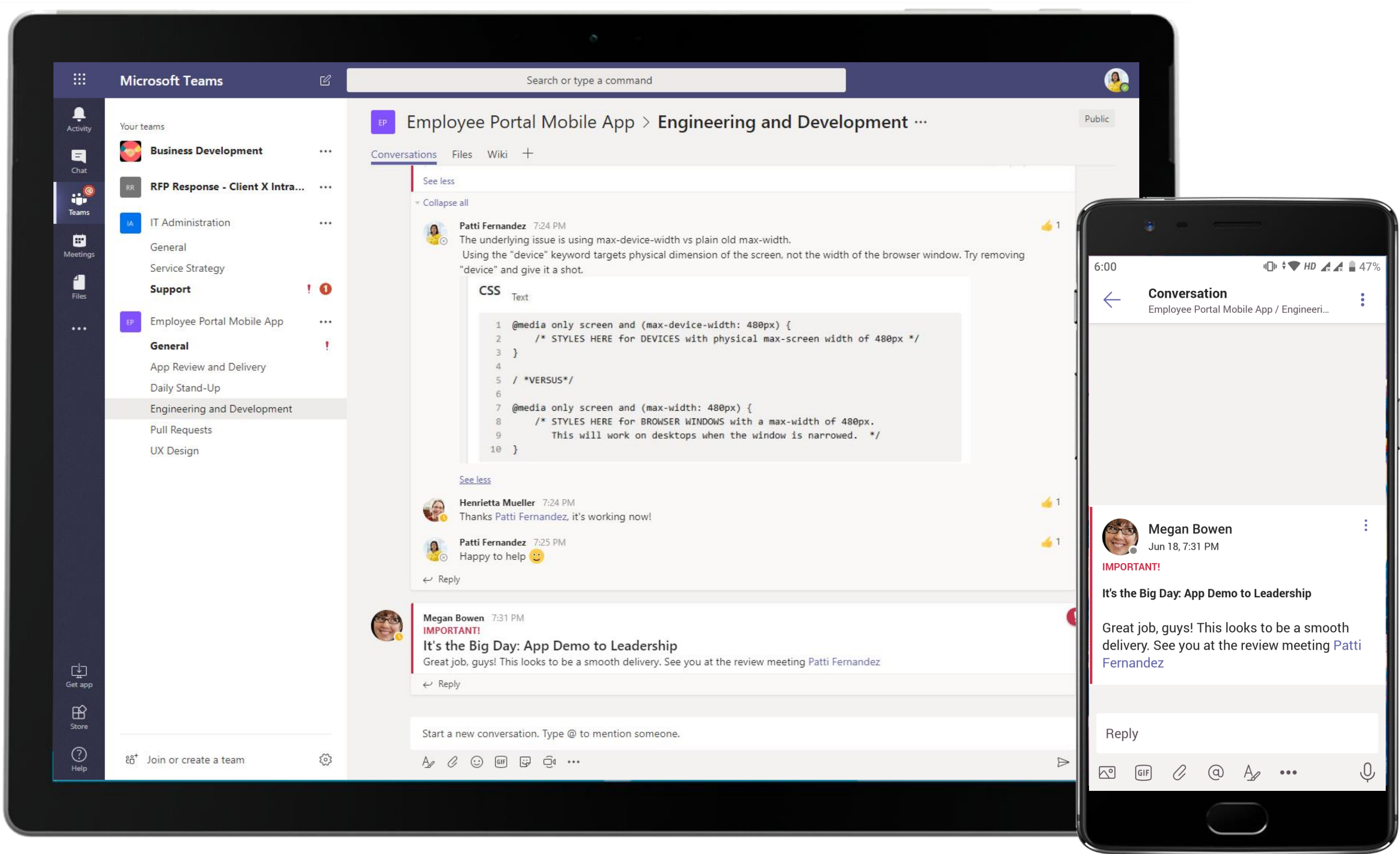
Stay focused and communicate on issues and backlog using Jira Cloud bot for Microsoft Teams. The Engineering Manager lays down the map for the team.



Create, assign, watch, edit issues, log working time with Jira Cloud in Teams. The Engineering Manager assigns tasks using Jira Cloud.



As the Engineering team rallies to close out bugs and complete the project, channel conversations provide the platform to air out issues and update managers about the hurdles they come across.



Throughout the project, the Engineering Manager uses channel conversations to track issues, update stakeholders, stay updated with tasks, deadlines etc. and to communicate with team members to ensure on time delivery.



Bug Management

Developer

Scenario Walkthrough

A Developer working on Contoso's website incorporates a new search feature to help visitors better navigate through the website. The Developer raises a pull request of the new code and notifies the testing team of the pull request. She leverages applications and powerful communication tools within Microsoft Teams to stay on top of all bugs identified and to remain in constant communication with the Testing team till all the bugs are resolved and the code is pushed live.

- Pushes the new code for testing and @mentions the channel in response to a GitHub notification using channel communications.
- Receives a notification from tester regarding a bug that redirects users to the wrong landing page via Jira Cloud.
- Fixes the bug and informs the Tech Lead that the code is ready for deployment via channel communications.
- Updates the status of the bug within a channel tab using Jira Cloud for Microsoft Teams.

How did Microsoft Teams help the Developer execute her roles and responsibilities?

- Manage code and receive notifications related to project activities using GitHub.
- Track, resolve and assign bugs right within Microsoft Teams using Jira Cloud.
- @mentions in chats and channels to catch each other's attention instantly.

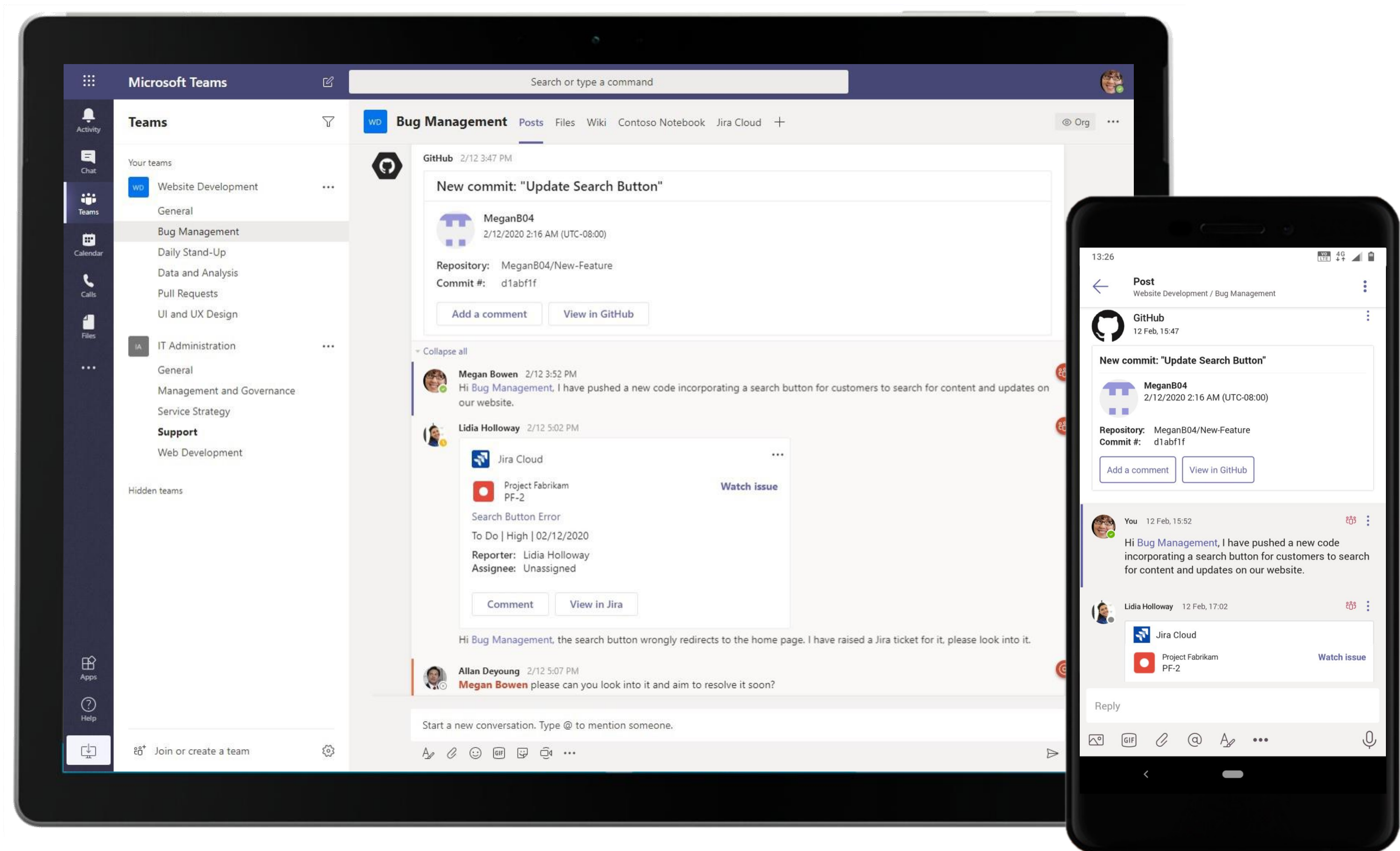
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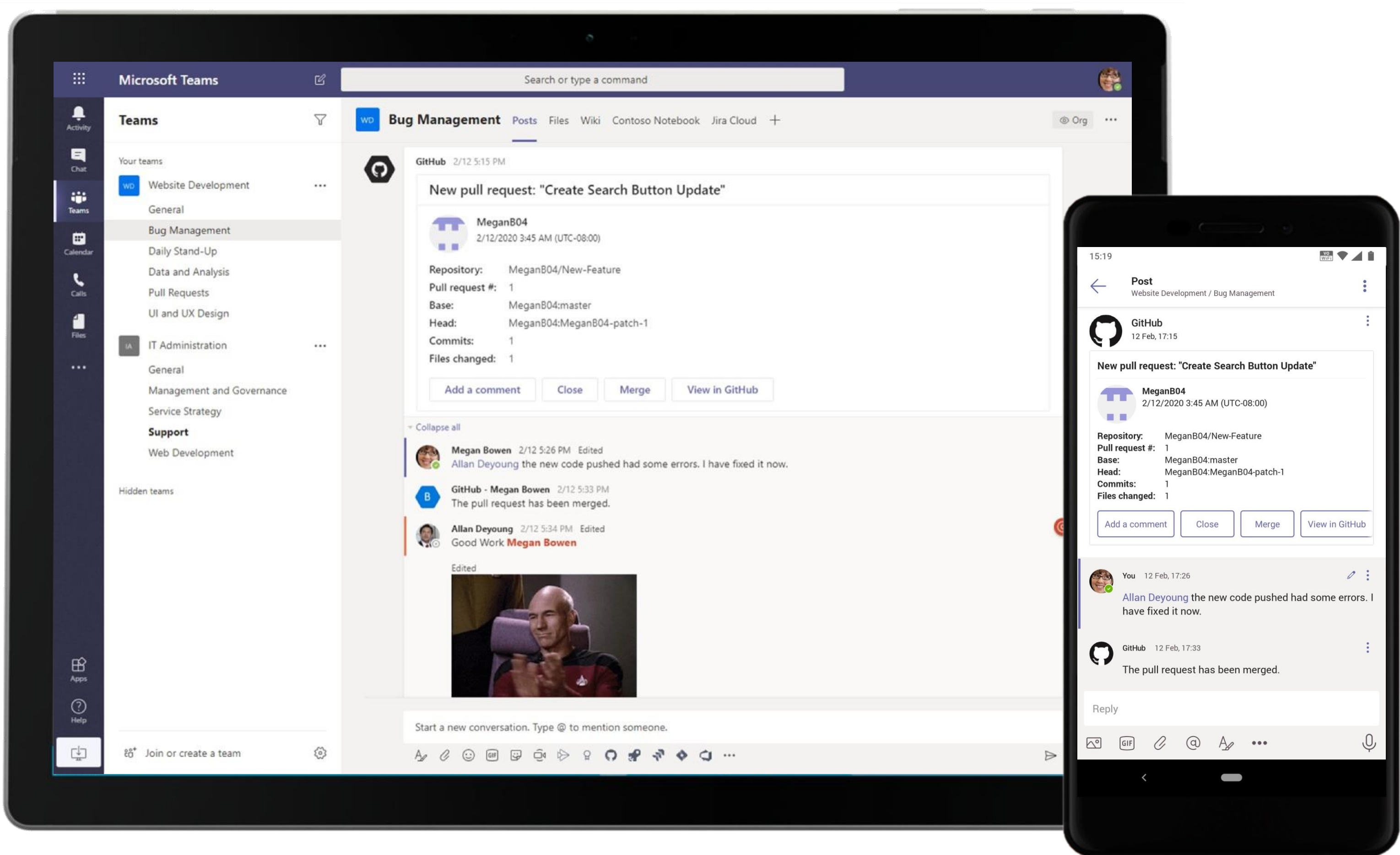
GitHub



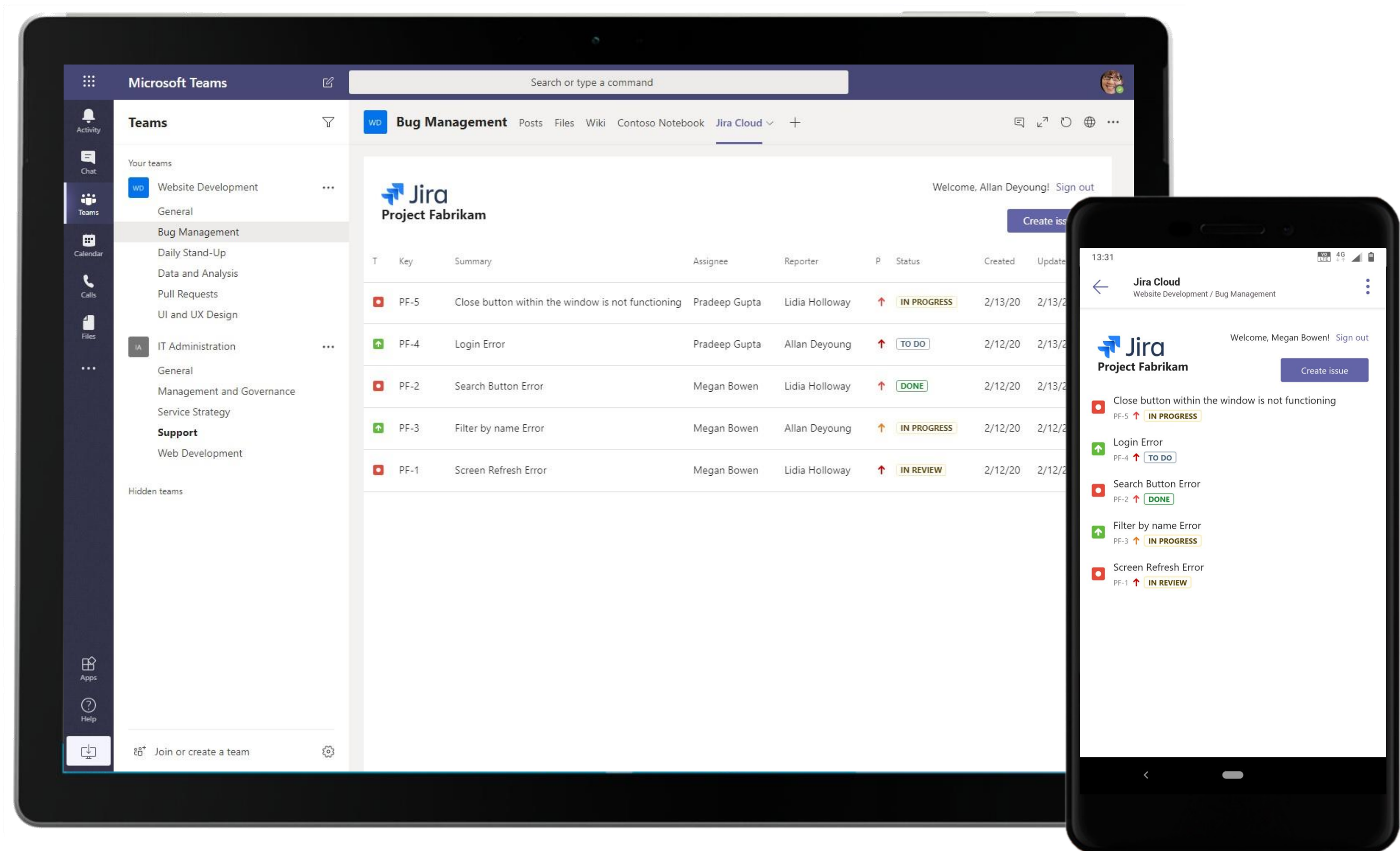
Jira Cloud



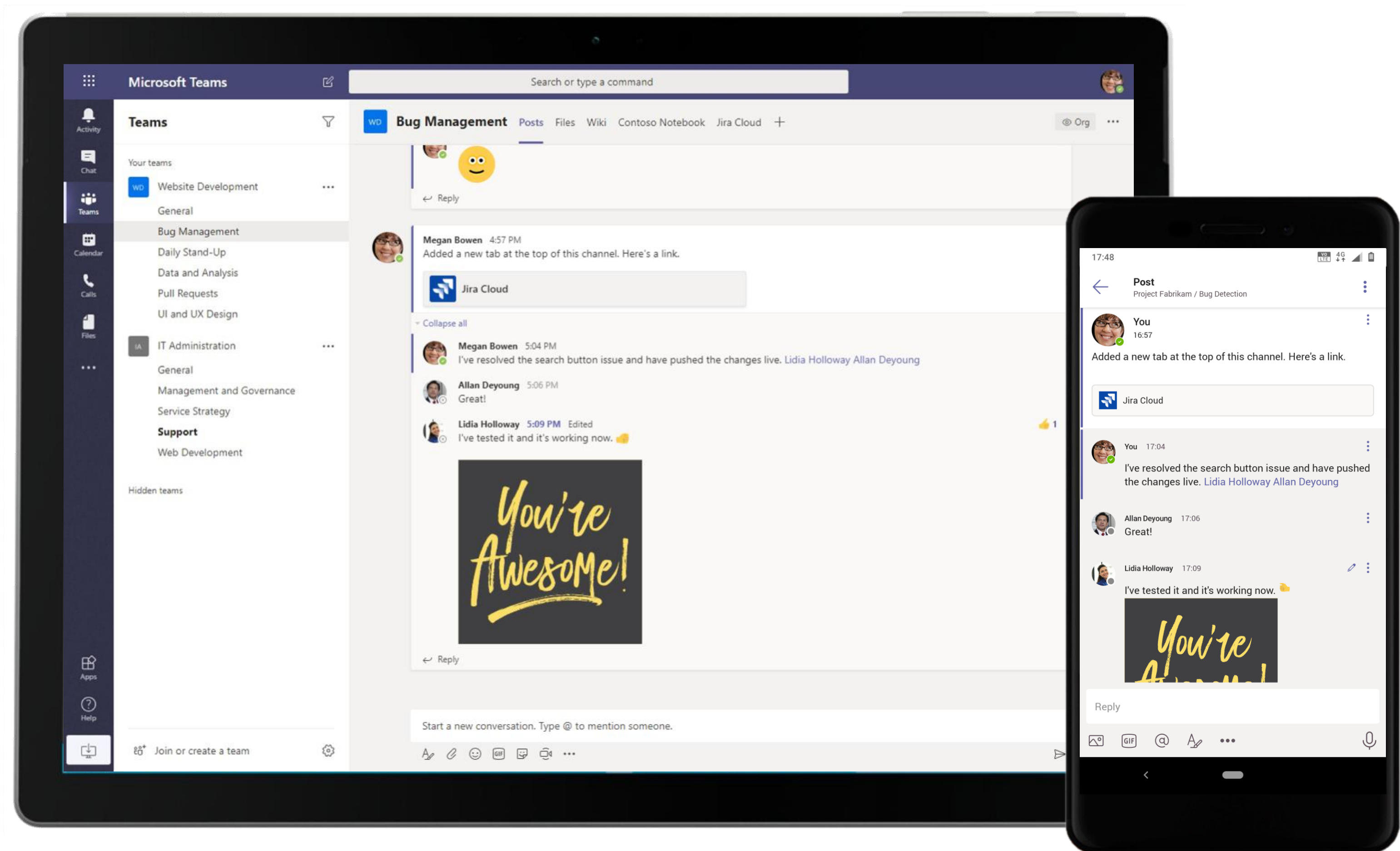
Configure GitHub in Microsoft Teams to receive notifications for Pull Requests, Pushes, Issues, Commit comments etc. Jira Cloud bot enables team members to easily find issues, assign them to team members, make edits, log time against an issue, watch/unwatch and vote/unvote on the issue.



As the Developer gets notified about a new Pull Request, she fixes the errors and alerts the Tech Lead @mentioning him in the channel.



Jira Cloud for Microsoft Teams makes collaboration and communication over the backlog easy and smooth. The Tech Lead views issues and the progress in the Jira Cloud tab.



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



Finance & Accounts

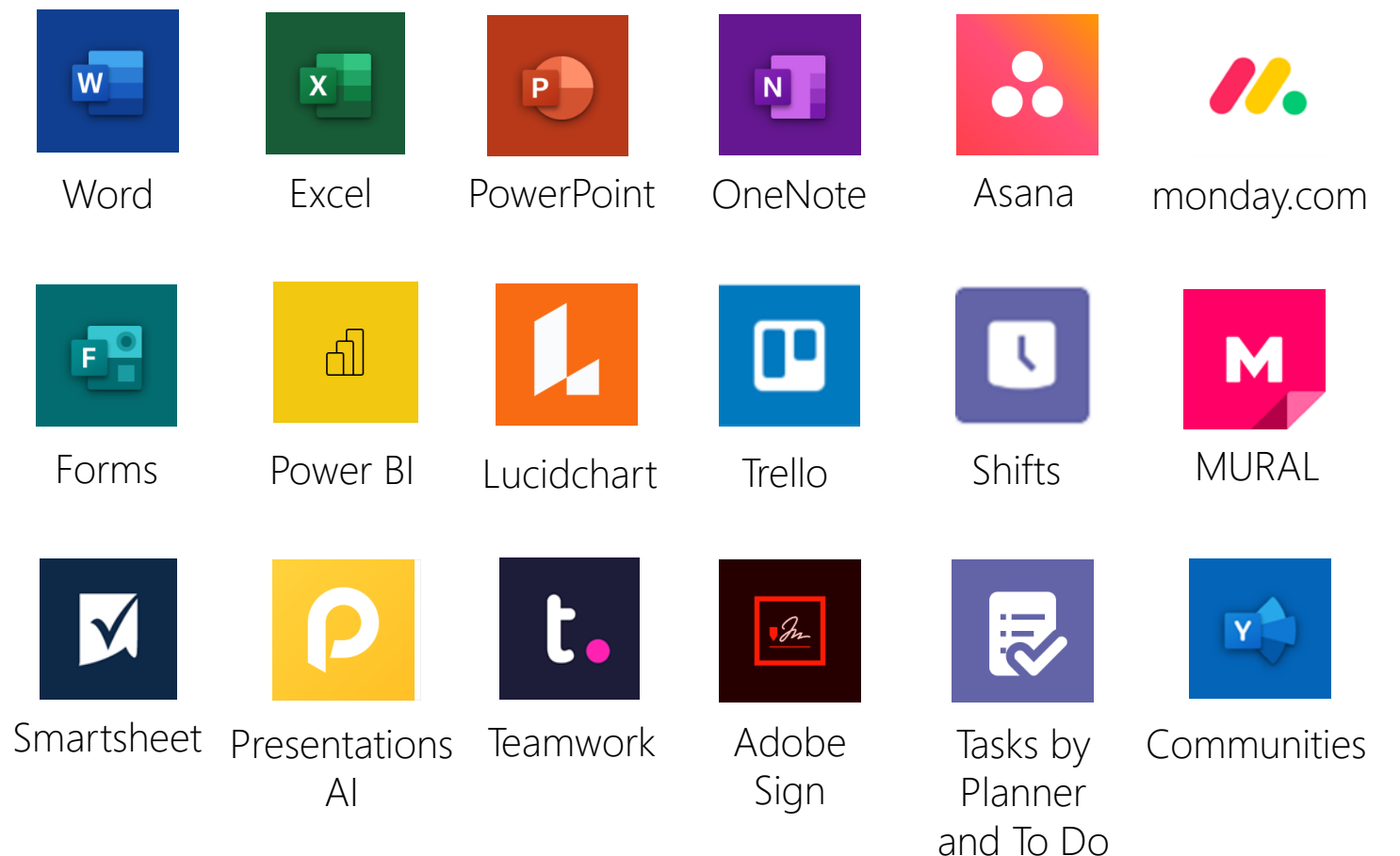
These scenarios will illustrate how Teams can help different Finance roles in quickly turning data into actionable insights, automating manual and repetitive processes and driving better decisions through collaboration.

Finance & Accounts Superpowers in Teams

Capabilities and Features used...

- Hold remote presentations over protected video conferences
- Participate in instant, open-channel communication
- Store documents within a cloud-enabled repository with Files
- Real-time, contextual file sharing and co-authoring
- Channel Tabs for everyone to stay updated
- Help securely collaborate with teammates on multiple projects from a single environment

Apps that enable an immersive experience in Teams



Meet the Business Decision Makers

Finance & Accounts



Finance Manager

"Being in a decision-making capacity means I must constantly communicate with my team and access business critical reports in a secure forum."

- Review financial reports and build budget plans
- Prepare activity reports and financial forecasts
- Identify ways to improve profitability
- Analyze markets for business opportunities



Financial Analyst

"Every failure leaves a trail of clues, which we only need to follow to find the solution."

- Provide guidance for making investment decisions
- Assess the performance of company stocks and bonds
- Engage in failure analysis and be a part of the investigation
- Review budget proposals and funding requests



Finance Associate

"An investment in knowledge pays the best interest."

- Assist with the preparation of operating budgets, financial statements, and reports
- Analyze financial data and assisting with audits, reviews, and tax preparations
- Advise other departments on best practices related to fiscal procedures



Planning Budget for Holiday Giveaways

Financial Associate

Scenario Walkthrough

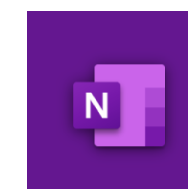
Contoso believes in a happy work environment for its employees. The holiday season warrants a celebration, and the HR and Finance team members work together to find room in the Contoso budget for employee giveaways during the festive season. The HR Manager reaches out to the Financial Associate and Finance Manager for budget approval. Here's how the three of them use Teams to convene and roll out an action plan.

- Receives notification when mentioned in a channel post regarding budget allocation for employee engagement activities.
- Responds to post and looks into budget possibilities.
- Receives channel meeting invite.
- Takes notes in OneNote regarding action items.
- Finance Manager uses Excel to create and present a budget plan.

How did Teams help the Financial Associate execute her roles and responsibilities?

- @mention feature helps keep track of essential conversation that requires the manager's attention or response.
- Integrated OneNote app helps quickly pen meeting MOMs and objectives.
- Integrated Excel tab gives quick access to present budget plan.

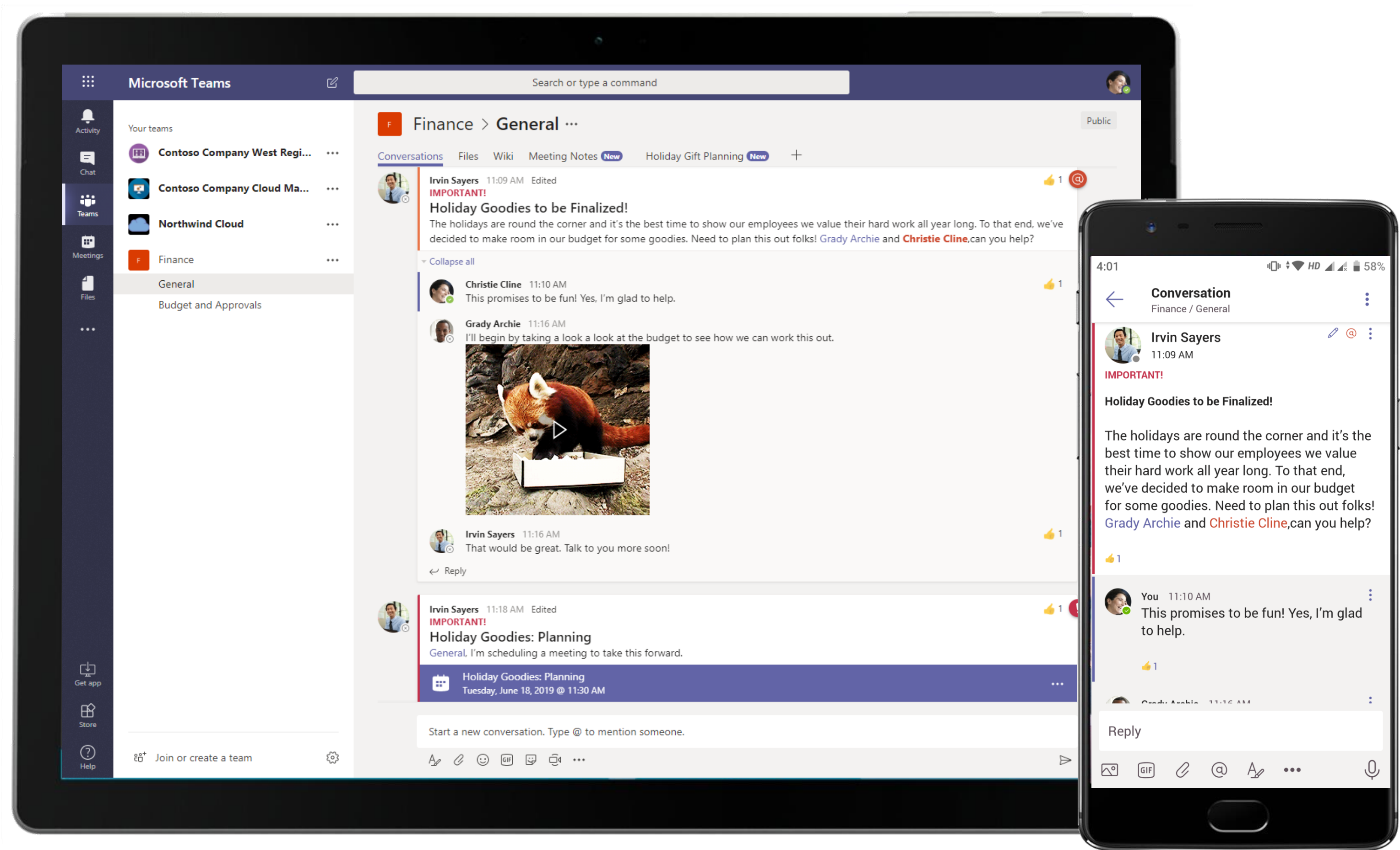
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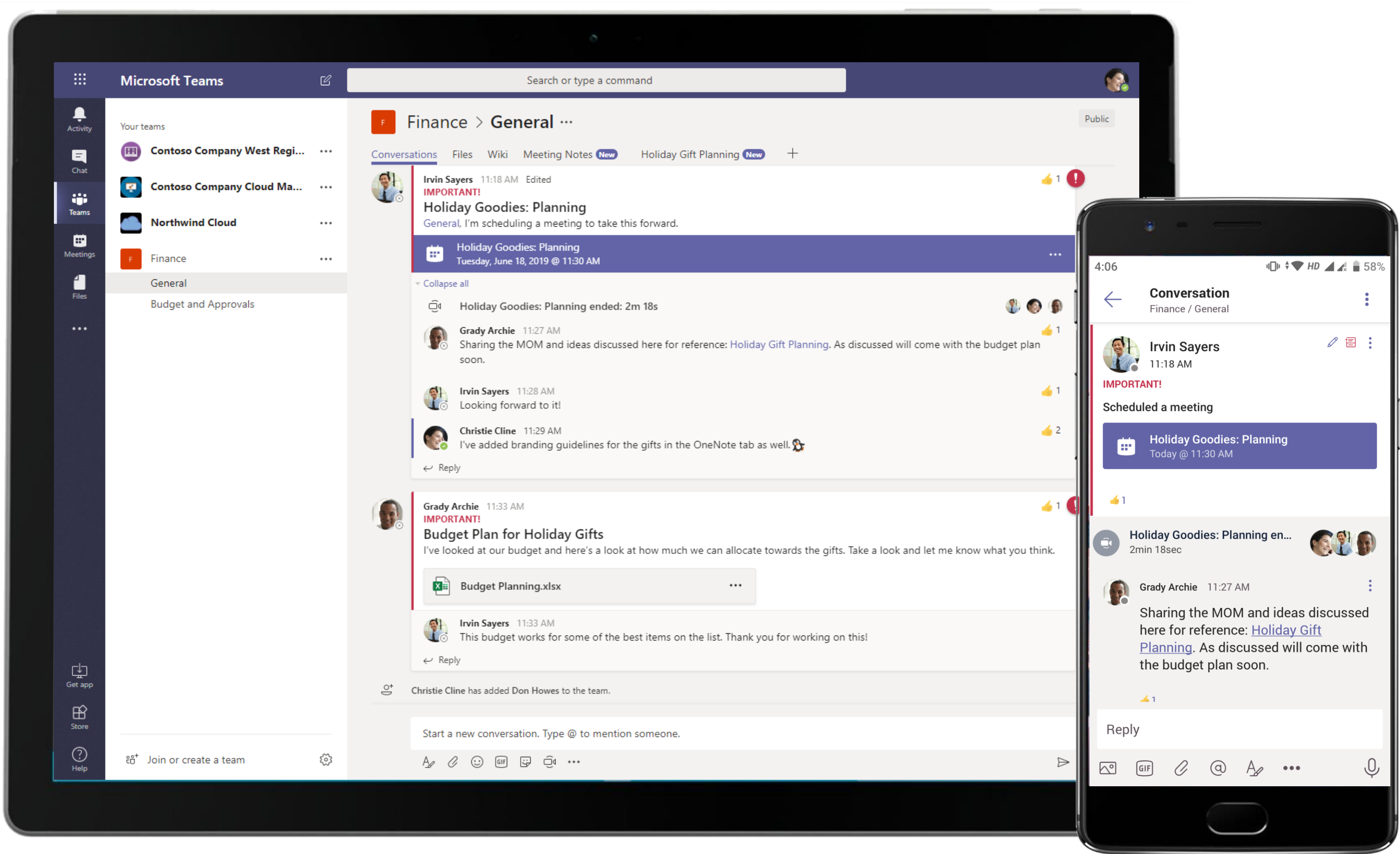
OneNote



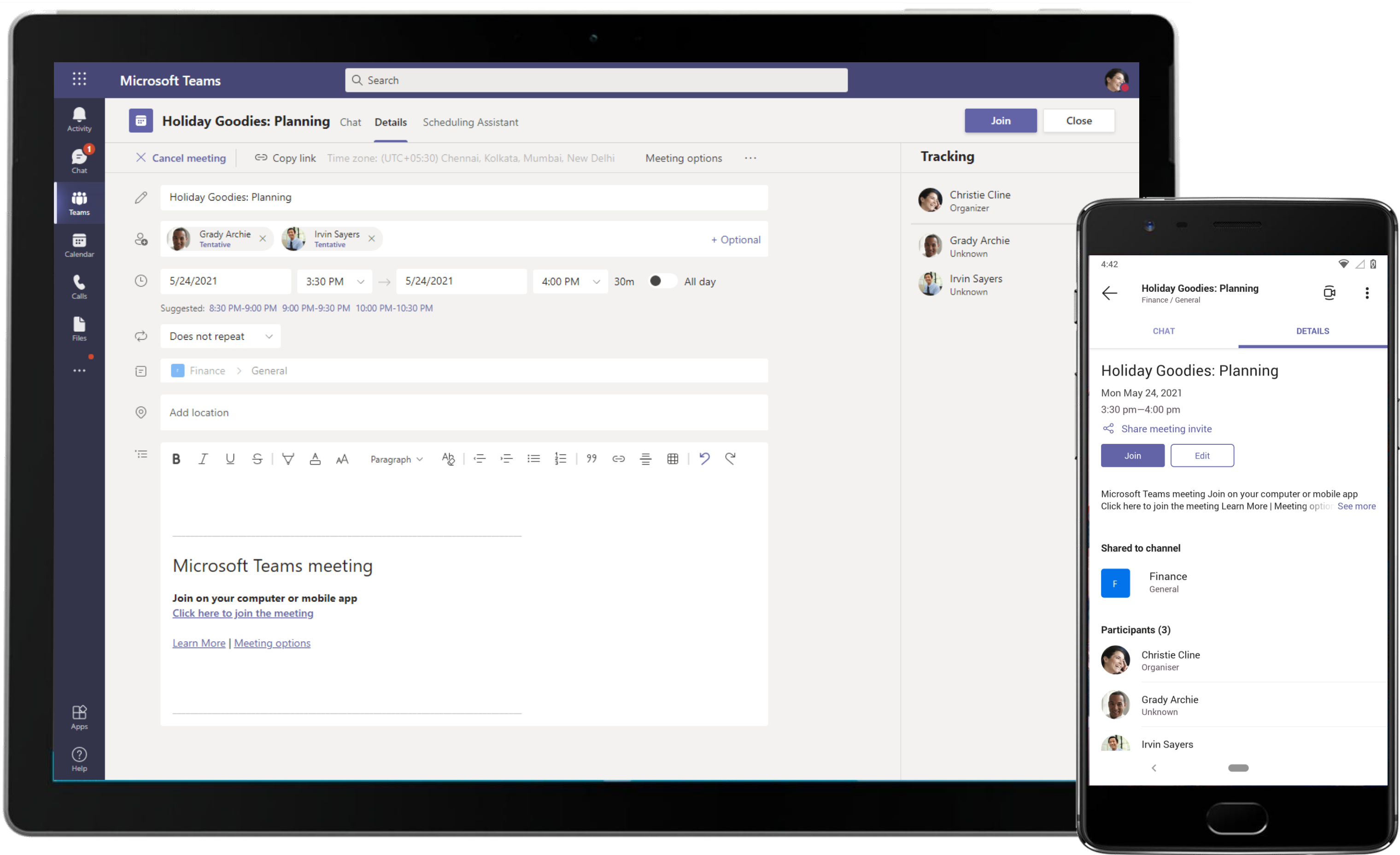
Excel



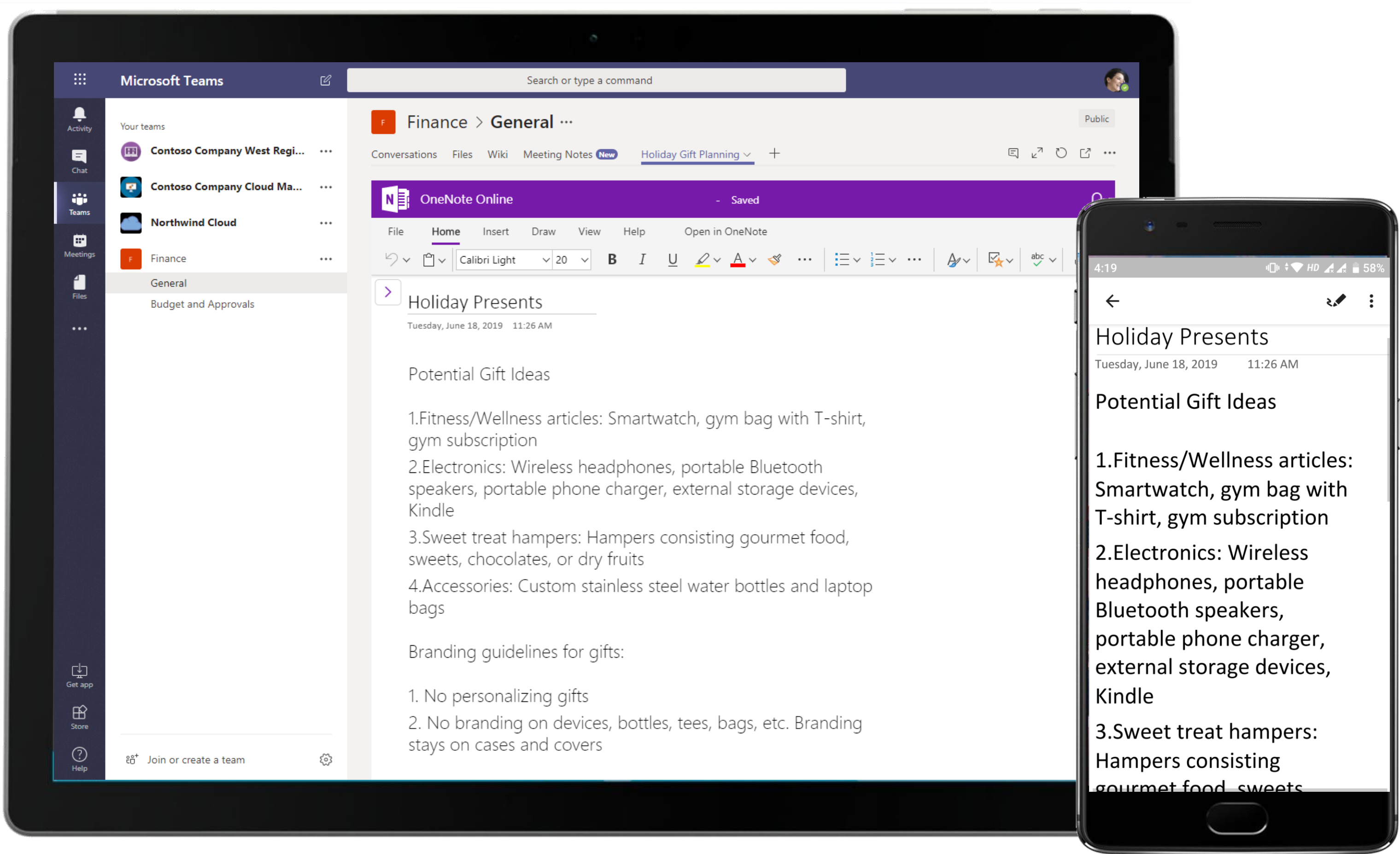
The HR Manager sets the holiday plan in motion in the channel, roping in relevant team members to help with budget planning. He uses the @mention feature to call their attention to his post, which also sends out a notification in their Activity Feed.



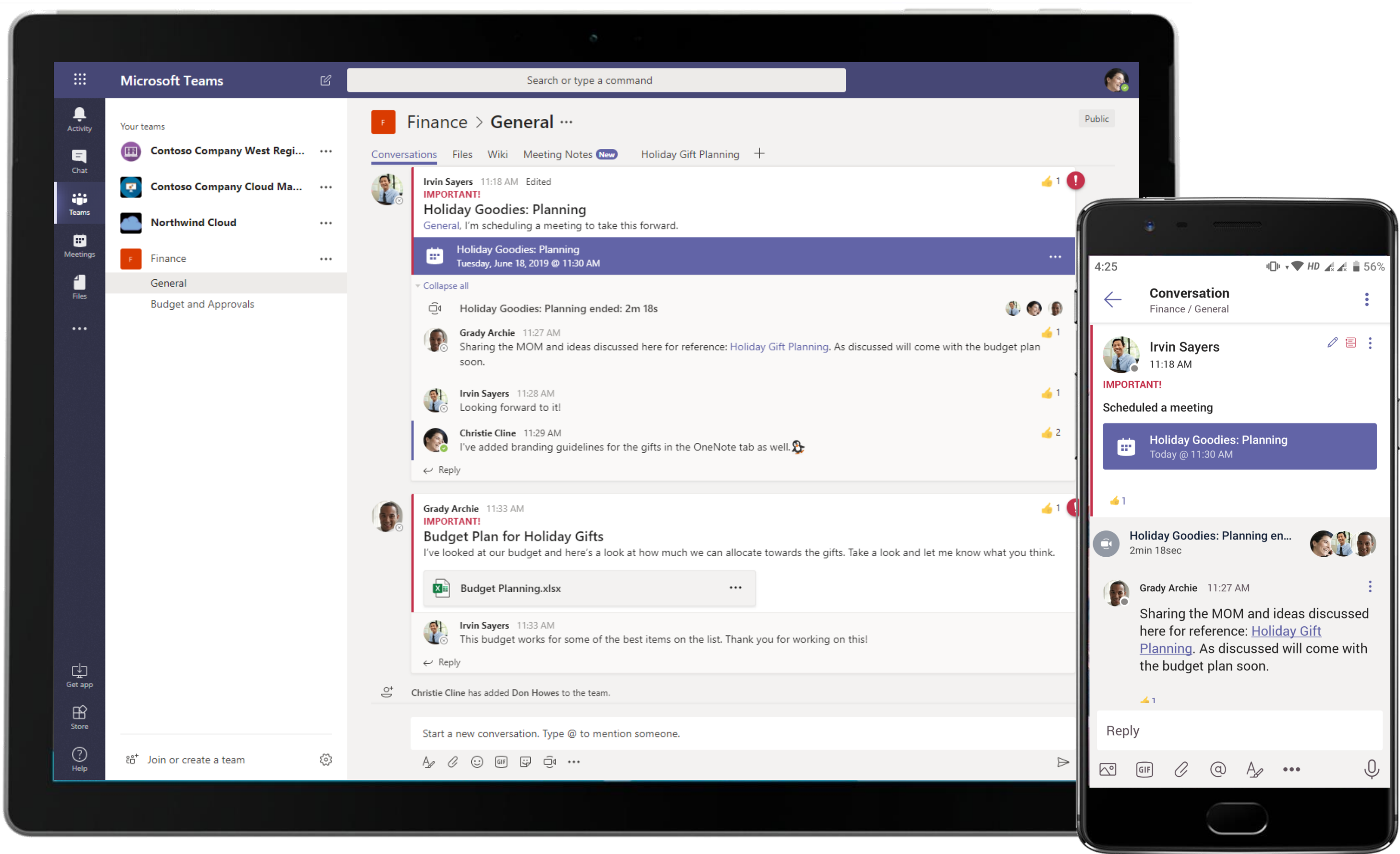
The HR Manager kicks off planning over an online meeting and the team keeps conversations and relevant documents all in the meeting thread for easy reference.



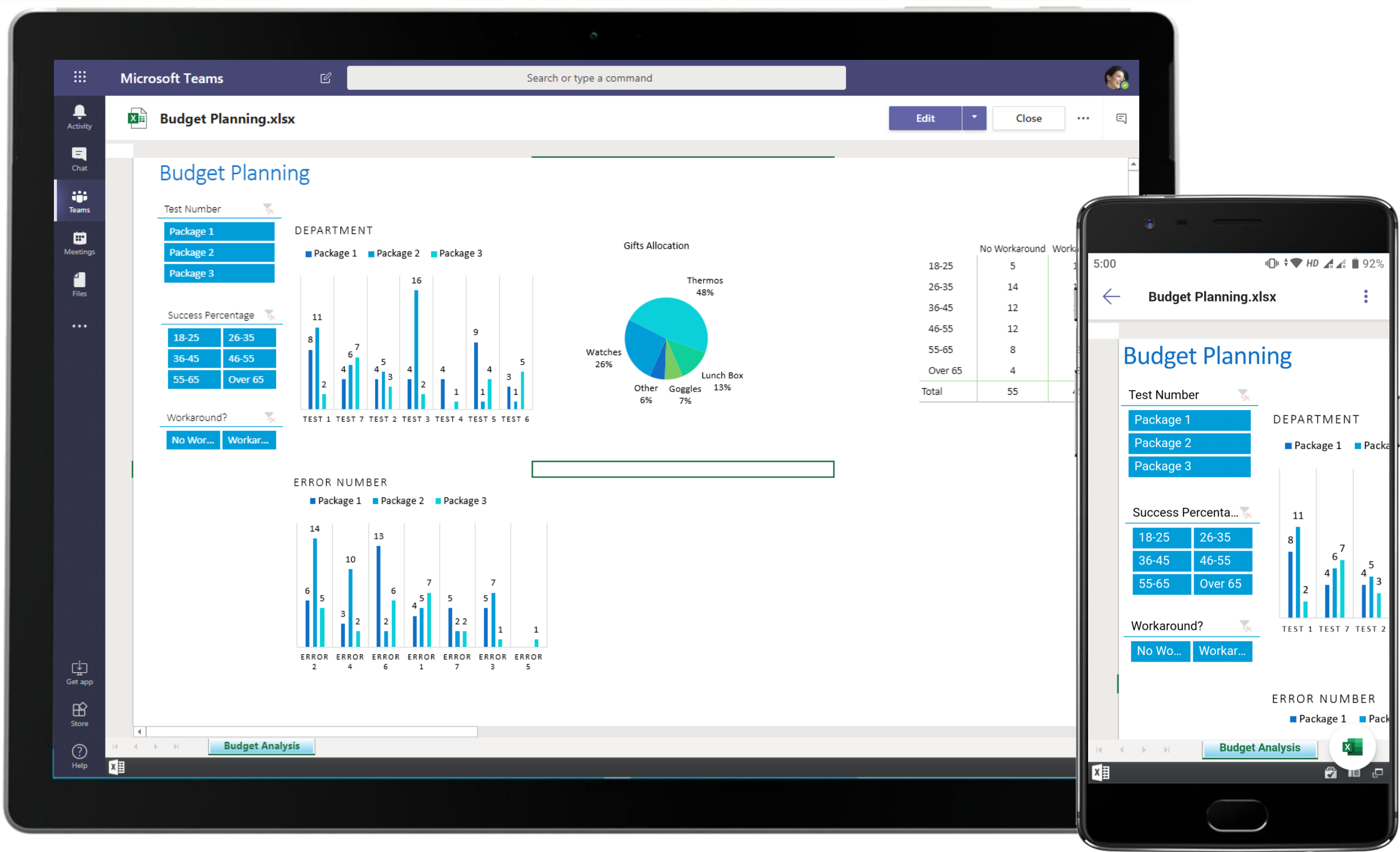
Plan meetings or keep them impromptu, according to team members' availability, which reflects in the native scheduling calendar. Hold protected calls and conferences and share screens with enterprise grade security.



Record meeting notes or observations in OneNote app inside Teams and share them when needed with the team for their consumption. The Financial Analyst keeps a track of the gifting ideas in a OneNote tab.



The Finance Manager along with Financial Analyst employs Excel’s analytical abilities within Teams to build the budget plan and share it with the HR Manager as requested.



Break down intricate numbers into visually consumable data with Excel. What's more? Make edits, store it in the protected Files repository and share it with your team! The Financial Analyst drills down further to highlight the plan's financial viability.



Budget Approval

Finance Manager

Scenario Walkthrough

It's time for Contoso's annual Design Thinking Workshop led by their design thinking experts. The Finance Manager steps in to make the necessary financial and budget assessments for the event. This is, however, not a one-man job. Teams provides a forum for the Finance Manager to seamlessly work with analysts and the talent community team to detail plans for the event.

- Creates a team to work together with the analysts and the talent community team.
- Creates a daily sync call with them to come together for updates.
- Tracks tasks necessary for the completion of the event with Workstreams.ai.
- Uses Excel to create budget breakdown and uploads the spreadsheets to the Files tab in the channel for peer review.
- Uses General channel to post an update for the team and Places app to share location to celebrate a job well done!

How did Teams help the Finance Manager execute his roles and responsibilities?

- Look up detailed info about different businesses, restaurants, venues, and more with Places.
- Integrating Workstreams.ai helps assign, track and communicate tasks and milestones without having to switch apps.
- Using Excel allows team members to have shared access to the budget information for review and analysis.

Which app integrations on Teams made it possible?



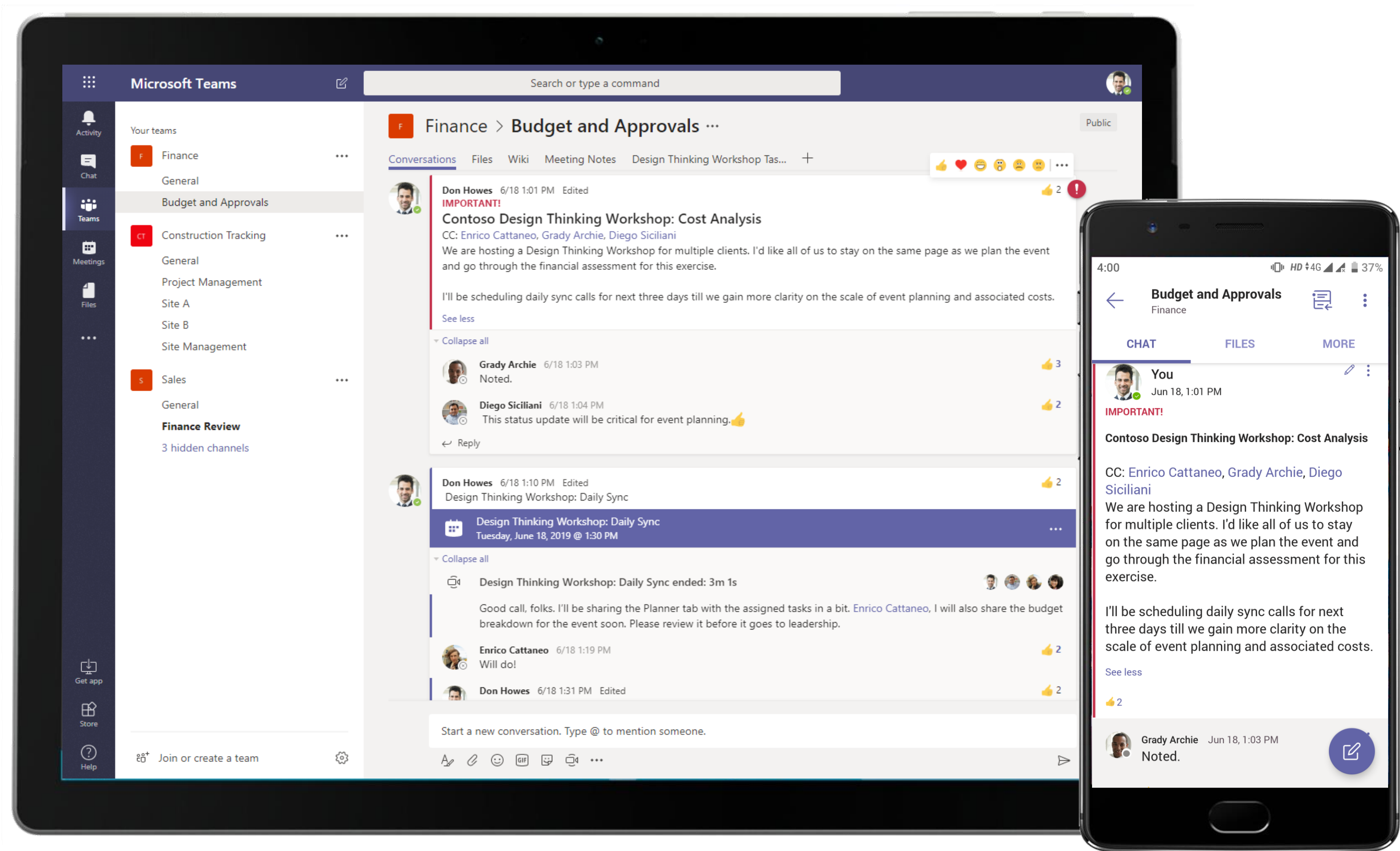
Places



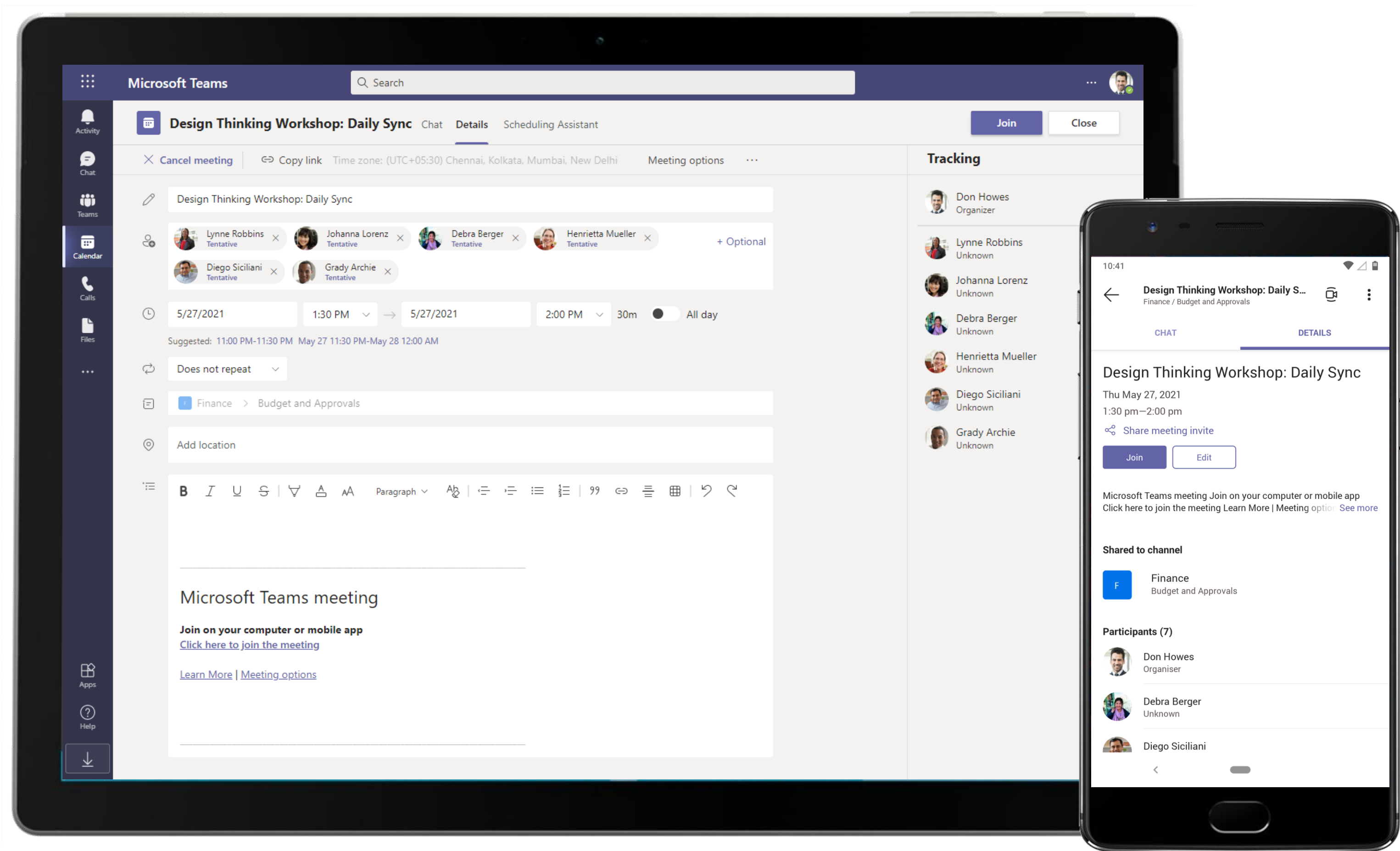
Excel



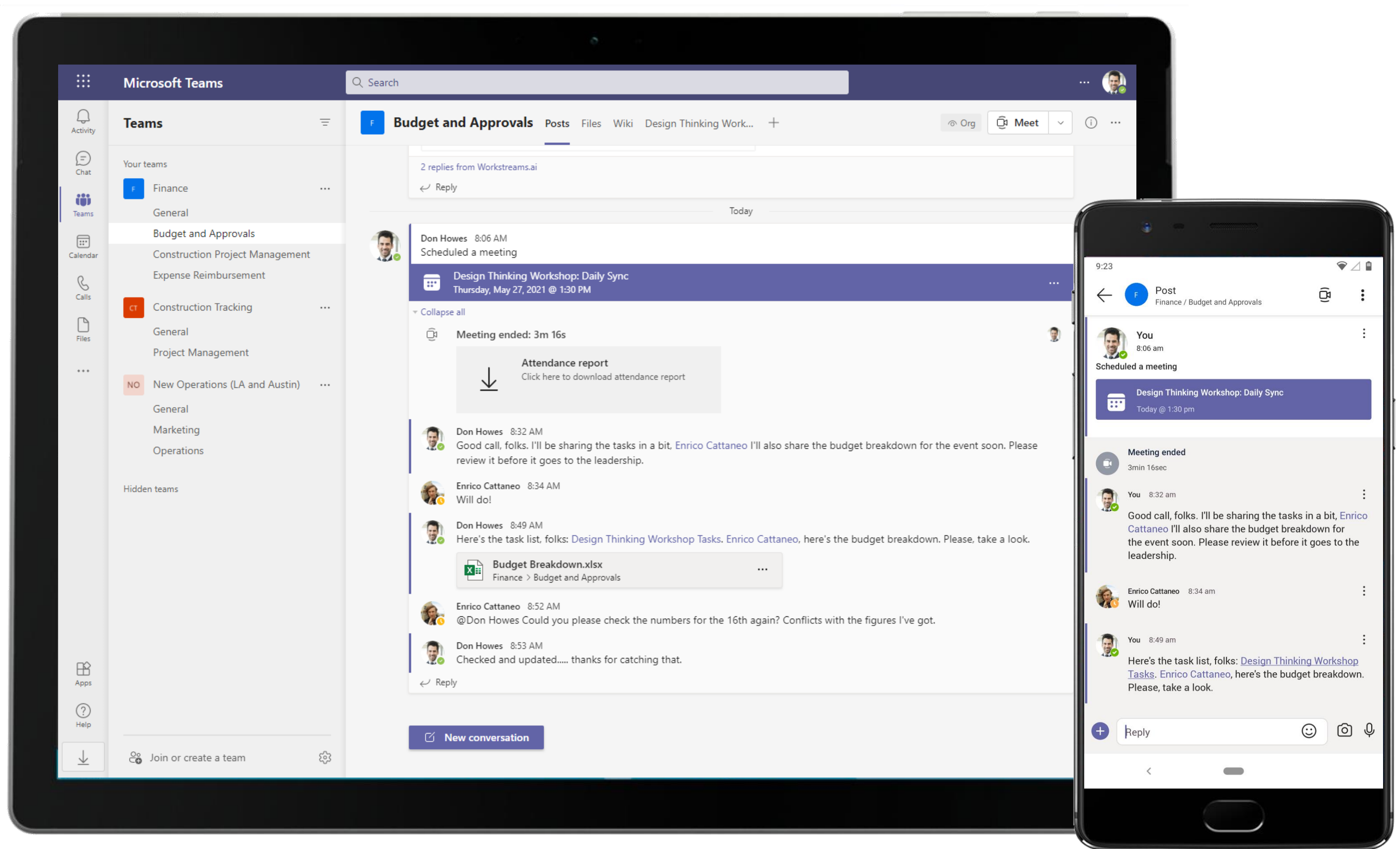
Workstreams.ai



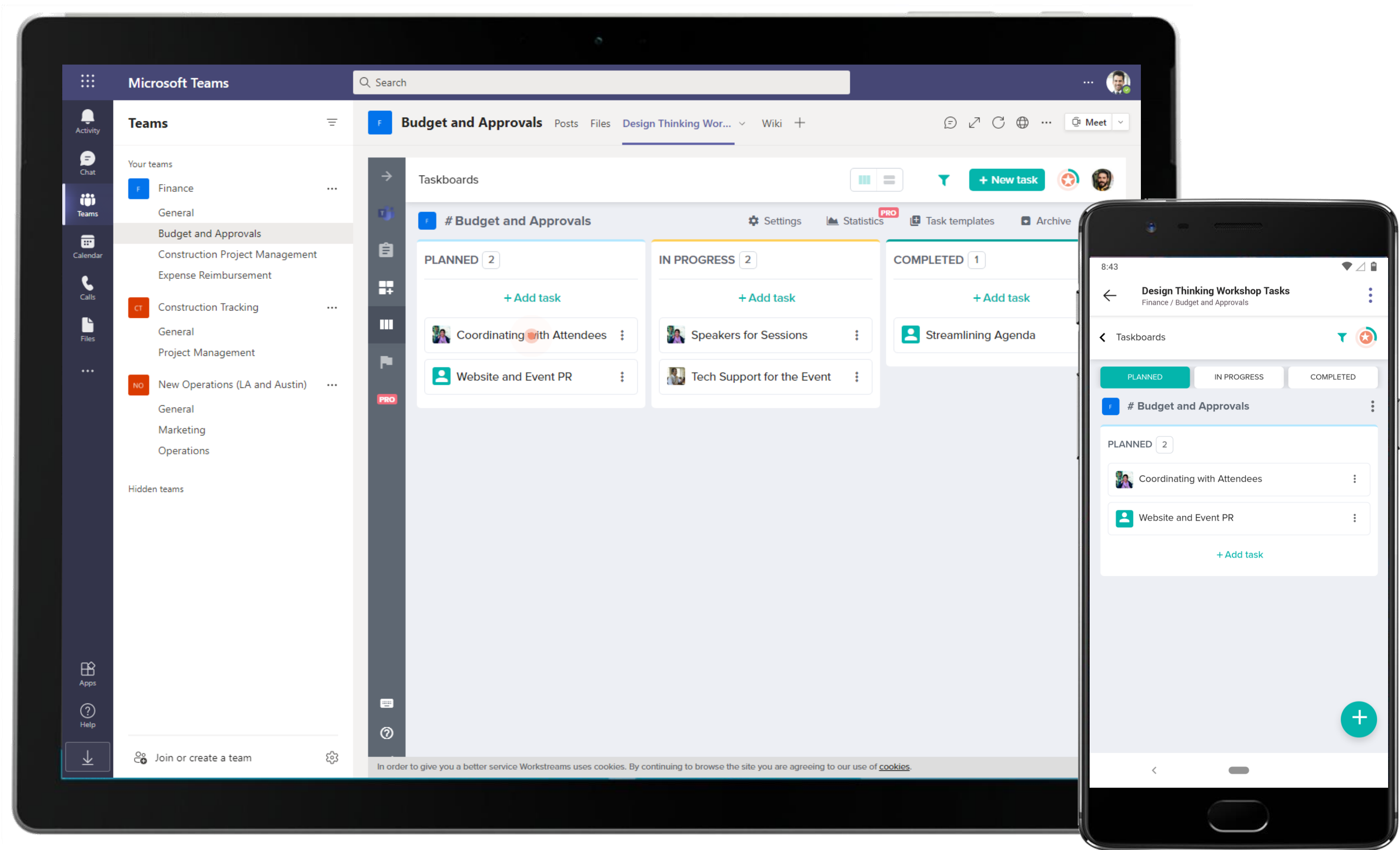
Channel conversations keep team members in sync with each other. They enable contextual, structured, data-driven discussions and decision making such as the financial analysis for a workshop in this case.



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



Meetings can either be scheduled or triggered instantly using the Meet Now feature. The finance team meets online using Teams and continues their conversation in the same thread for easy future reference, including sharing analyses using Excel spreadsheets.



Create tasks, add labels, assign teammates and manage your work in flexible Kanban boards with Workstreams.ai in Teams.

Microsoft Teams

Search or type a command

Activity

Chat

Teams

Meetings

Files

Get app

Store

Help

Budget Breakdown.xlsx

Edit

Close

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Sum of expenses	Column Labels											
2		05/05/2019									05/05/2019 Total	Grand Total	
3	Row Labels	Session 1	Session 2	Session 3	Session 4	Session 5	Session 6	Session 7	Session 8	Session 9			
4	Day 1 (06-16-2019)	\$ 100,000.00	\$123,124.00	\$4,125,125.00	\$41,231.00						\$ 4,389,480.00	\$4,389,480.00	
5	\$4,000.00	\$ 100,000.00									\$ 100,000.00	\$ 100,000.00	
6	\$5,431.00				\$41,231.00						\$ 41,231.00	\$ 41,231.00	
7	\$40,000.00		\$123,124.00								\$ 123,124.00	\$ 123,124.00	
8	\$60,123.00			\$4,125,125.00							\$ 4,125,125.00	\$4,125,125.00	
9	Day 2 (06-17-2019)				\$51,234.00	\$521,512.00	\$200,000.00	\$50,000.00			\$ 822,746.00	\$ 822,746.00	
10	\$5,125.00				\$51,234.00			\$50,000.00			\$ 101,234.00	\$ 101,234.00	
11	\$61,235.00					\$521,512.00					\$ 521,512.00	\$ 521,512.00	
12	\$124,123.00						\$200,000.00				\$ 200,000.00	\$ 200,000.00	
13	Day 3 (06-18-2019)									\$300,000.00	\$ 300,000.00	\$ 300,000.00	
14	\$612,353.00									\$300,000.00	\$ 300,000.00	\$ 300,000.00	
15	Grand Total	\$ 100,000.00	\$123,124.00	\$4,125,125.00	\$41,231.00	\$51,234.00	\$521,512.00	\$200,000.00	\$50,000.00	\$300,000.00	\$ 5,512,226.00	\$5,512,226.00	
16													
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Sum of Expenses

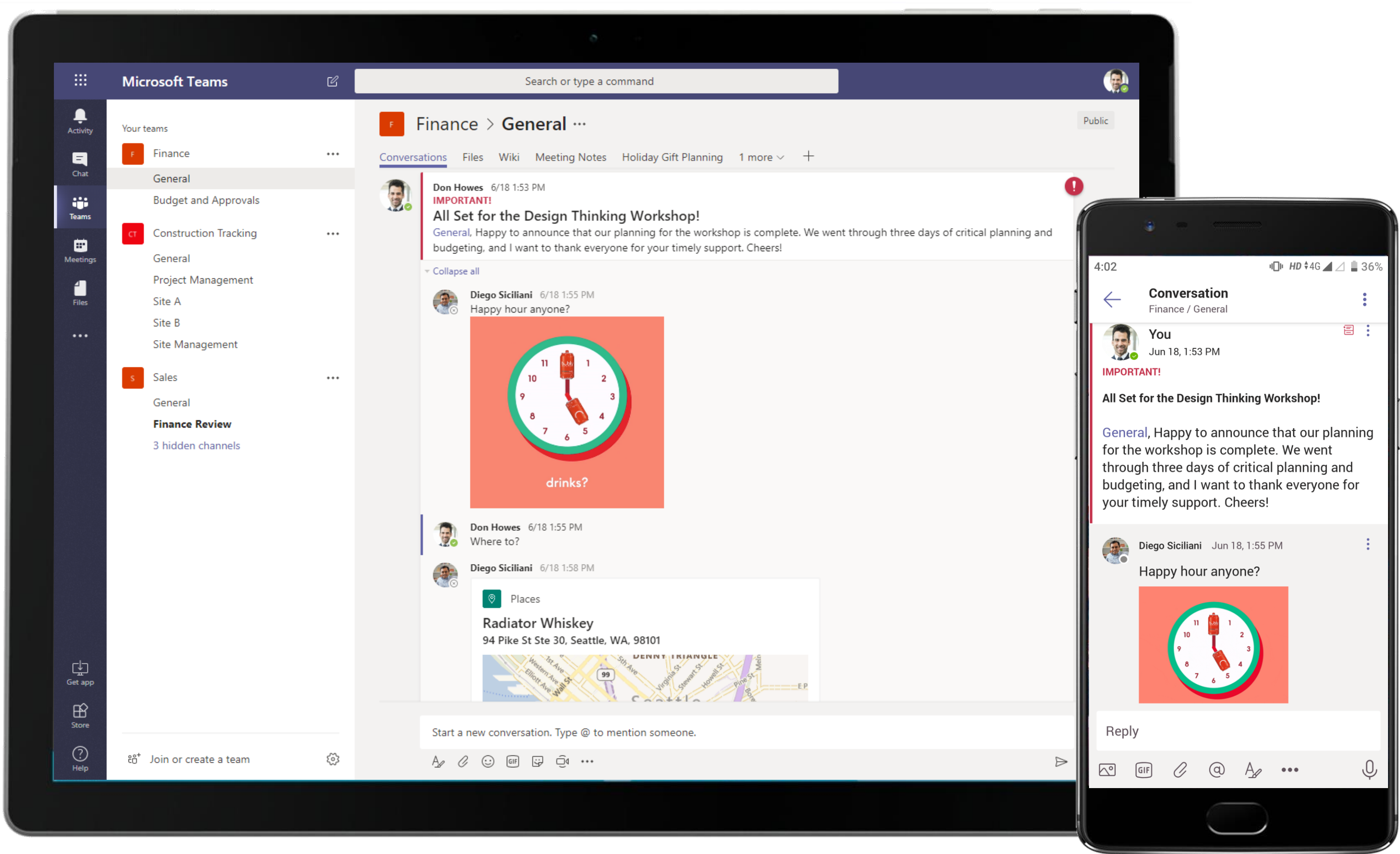
Approved Expenses

Budget Breakdown.xlsx

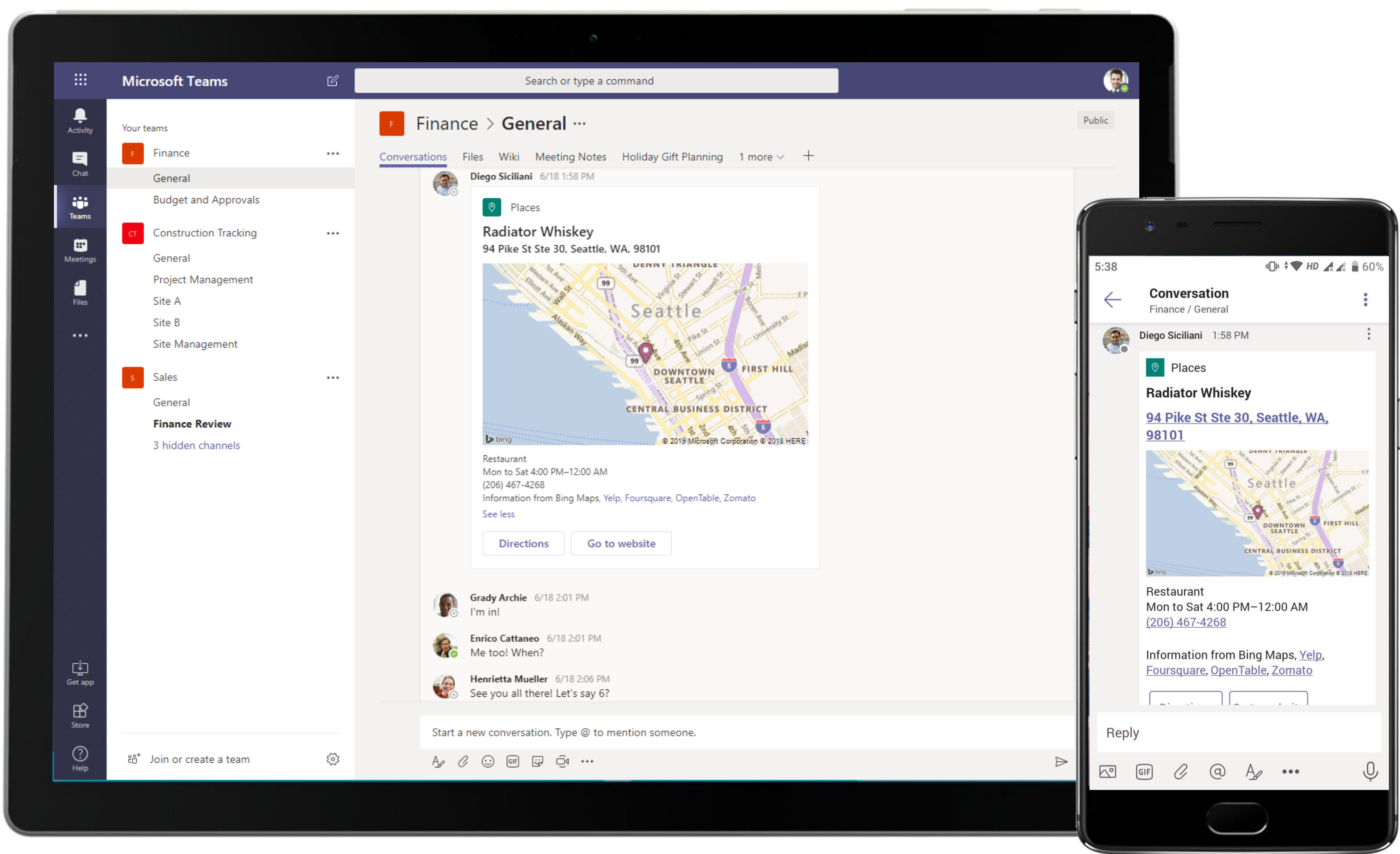
	A	B	C
1	Sum of expenses	Column Labels	
2		05/05/2019	
3	Row Labels	Session 1	Session 2
4	Day 1 (06-16-2019)	\$ 100,000.00	\$123,124.00
5	\$4,000.00	\$ 100,000.00	
6	\$5,431.00		
7	\$40,000.00		\$123,124.00
8	\$60,123.00		
9	Day 2 (06-17-2019)		
10	\$5,125.00		
11	\$61,235.00		
12	\$124,123.00		
13	Day 3 (06-18-2019)		
14	\$612,353.00		
15	Grand Total	\$ 100,000.00	\$123,124.00
16			
17			
18			
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20			
21			
22			
23			
24			

Sum of Expenses

The Finance Manager uses Excel in Teams to create a budget break down and uploads it to the Files tab in the channel for peer review. The spreadsheet can be pinned as a tab for quick access, while any edits to the file can be carried out with ease.



The Finance Manager uses channel communication to inform his team when the budget planning for the workshop is complete. Intense in moments of work flurry, these channels also see a fair amount of levity with GIFs and emojis that makes working together fun!



Location sharing becomes easy within Microsoft Teams with Places. The team members working on the budget make an impromptu plan to take their celebrations outside the workplace and they use Places to tag their meet-up location.



Reliability and Serviceability

Financial Analyst

Scenario Walkthrough

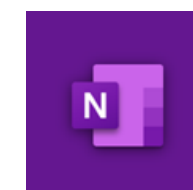
Contoso runs a multi-faceted analysis to identify the root-cause behind a project delay for one of their clients. The role of the Financial Analyst is to be part of the process and analyse the reports for negative impact on billing. Here is how Teams can help the Financial Analyst stay on track.

- Reviews incoming reports from analysts and project leads through a Power BI tab located in the channel.
- Takes notes regarding failure analysis using a OneNote tab.
- Red flags a potential issue that needs to be examined with the client.
- Communicates the issue to the respective personnel.
- Initiates a call and shares her screen with notes captured in OneNote with her team for issue resolution.

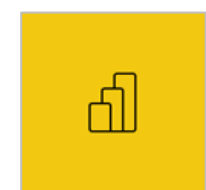
How did Teams help the Financial Analyst execute his roles and responsibilities?

- Collaborative and powerful document creation with OneNote.
- Dive into a wealth of analytical data with Power BI without leaving Teams.
- Host video calls and share your work virtually anywhere with video calling features.

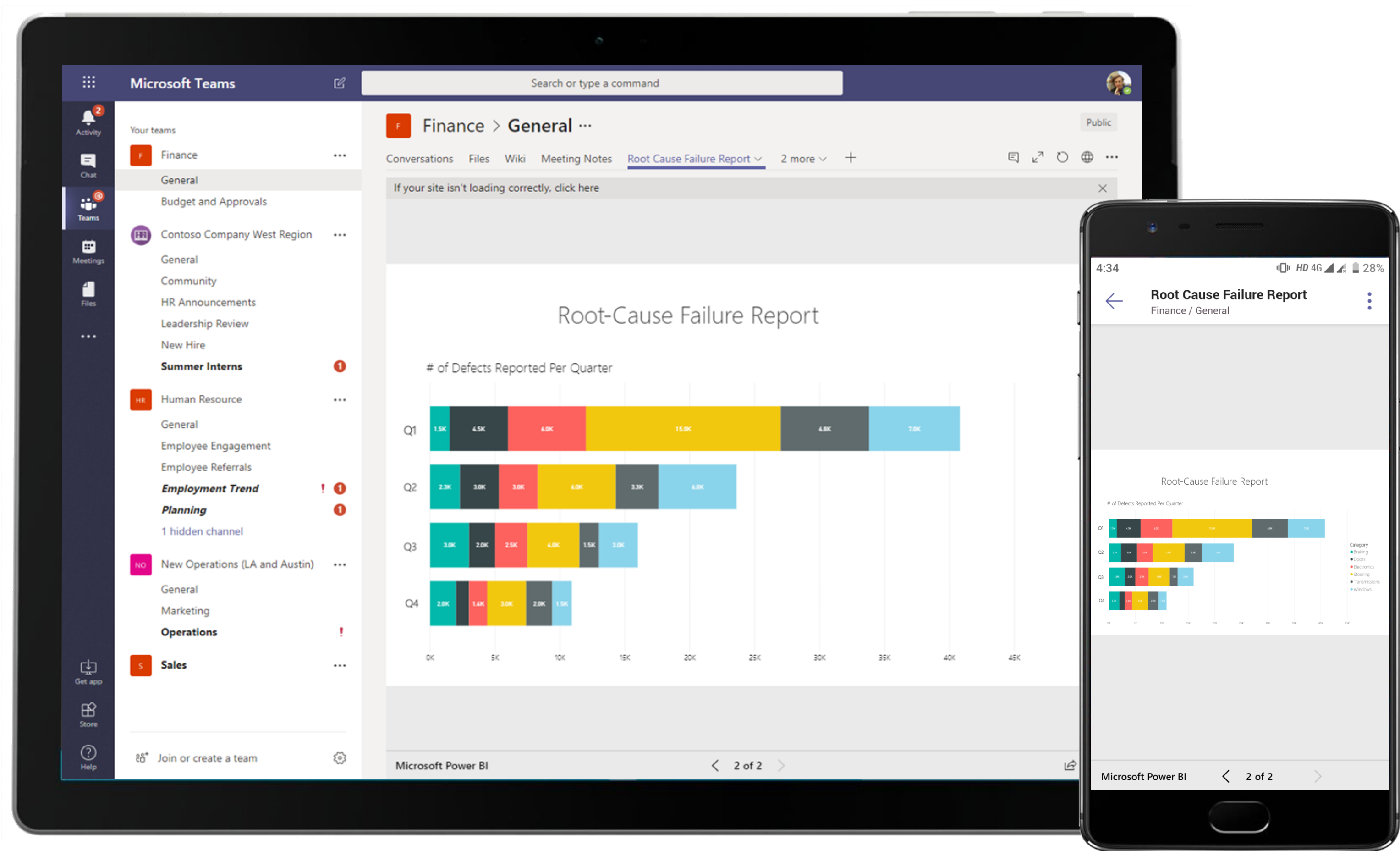
Which app integrations on Teams made it possible?



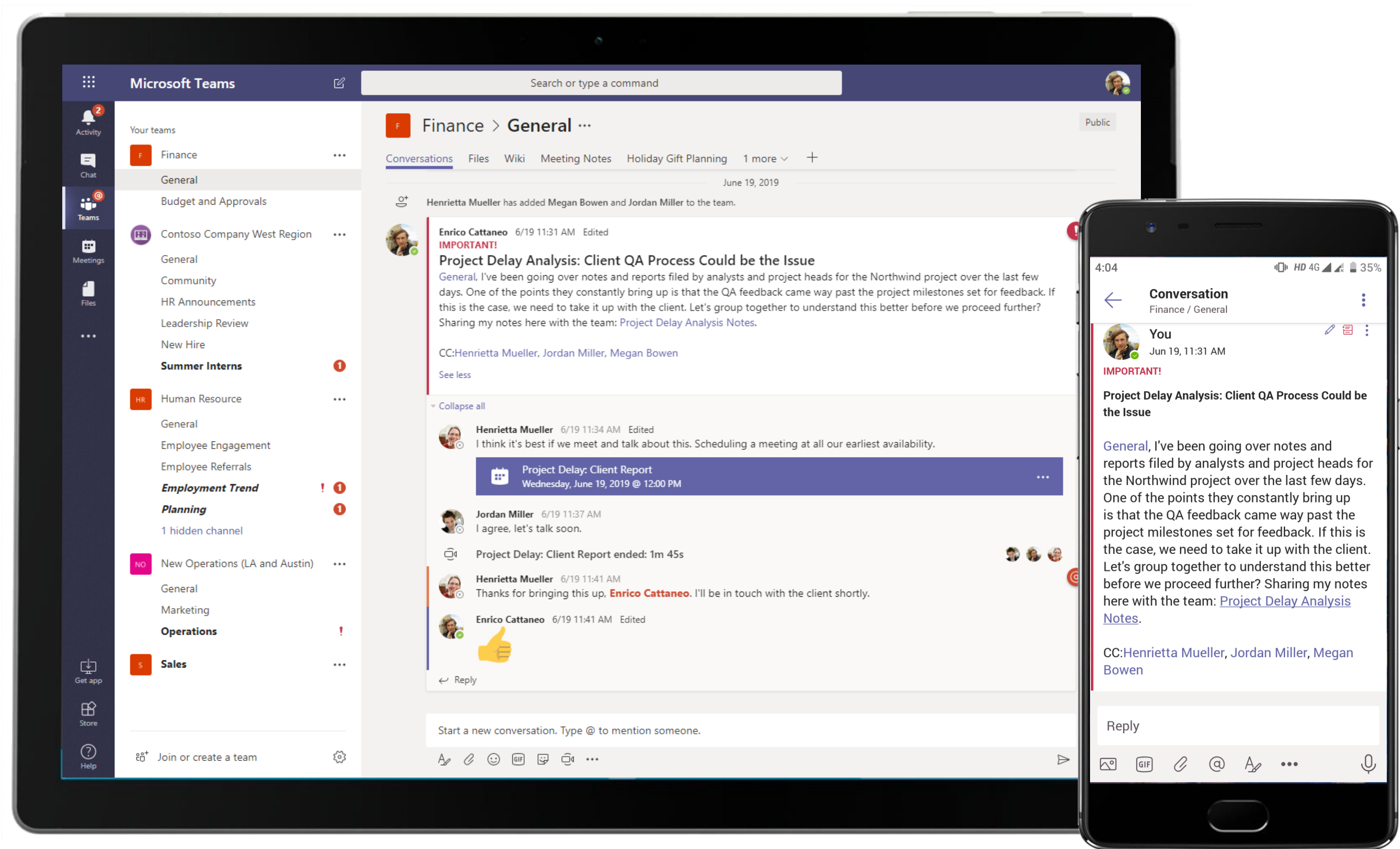
OneNote



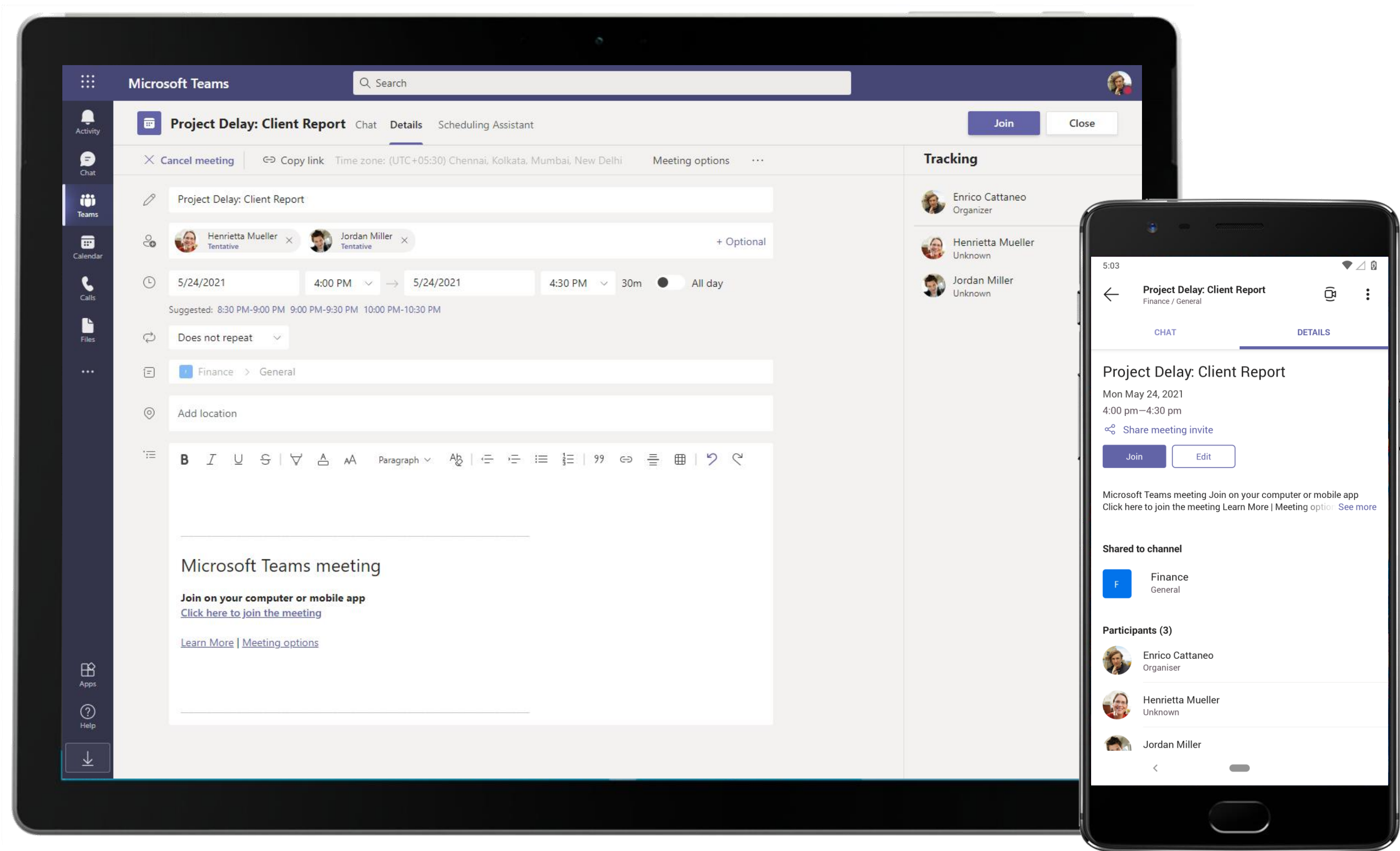
Power BI



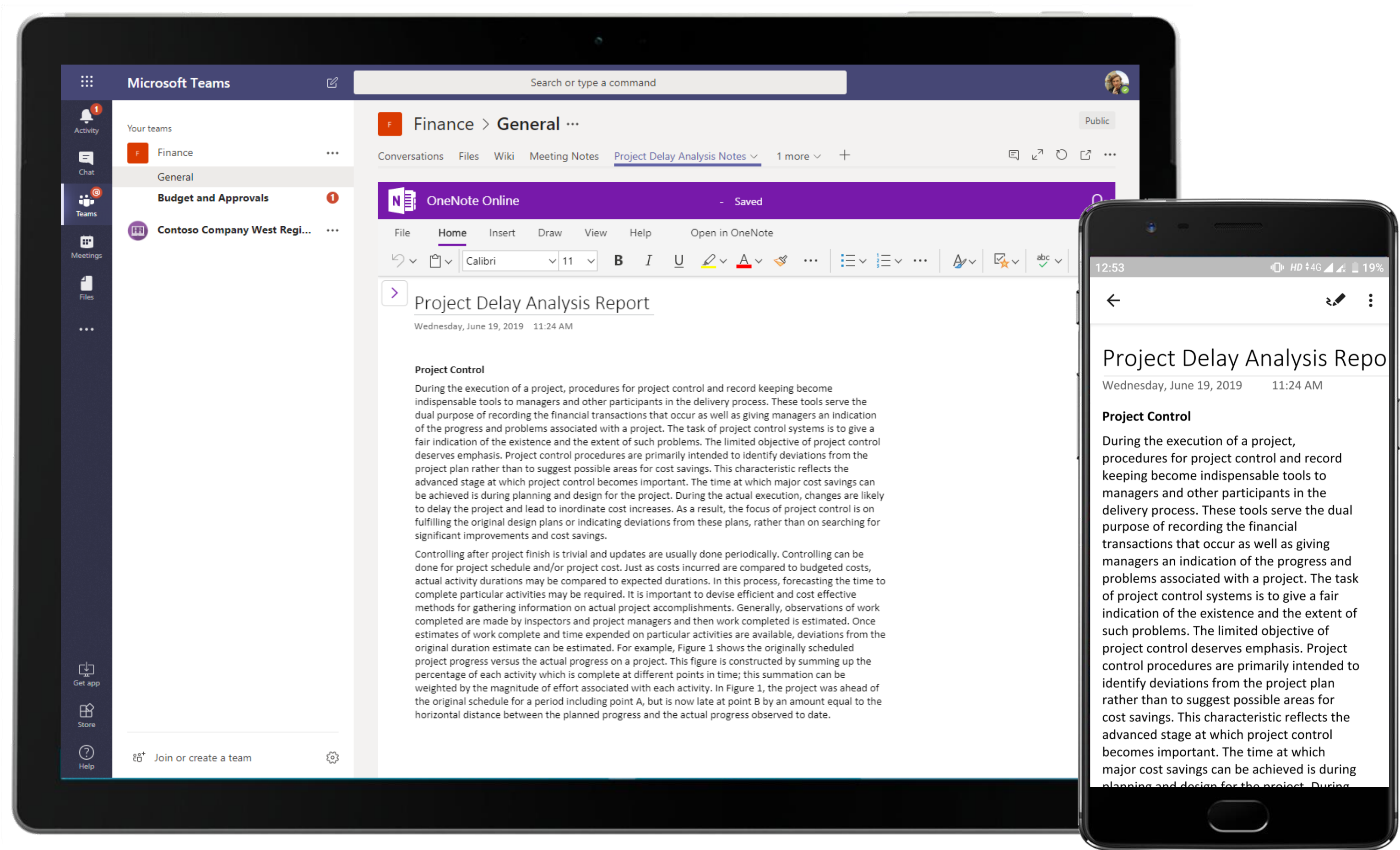
Facilitate data-driven decisions informed by visualizations and scoring in Power BI for Microsoft Teams. The Financial Analyst uses a Power BI tab pinned to the channel to review incoming reports from analysts and project leads.



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



Hold protected calls and conferences and share screens with enterprise security. Using the Scheduling Assistant feature, the Financial Analyst can choose an optimal meeting time for all attendees.



Whether it is meeting notes or analysis reports, OneNote in Teams is a powerful documentation tool. The Financial Analyst uses a OneNote tab to build a project delay analysis report and shares it later with his team.

Microsoft Teams

Search or type a command

Public

Activity

Chat

Teams

Meetings

Files

...

Your teams

Finance

General

Budget and Approvals

Contoso Company West Region

General

Community

HR Announcements

Leadership Review

New Hire

Summer Interns

Human Resource

General

Employee Engagement

Employee Referrals

Employment Trend

Planning

1 hidden channel

New Operations (LA and Austin)

General

Marketing

Operations

Sales

Join or create a team

Finance > General

Conversations Files Wiki Meeting Notes Project Delay Analysis Notes 1 more

OneNote Online Project Delay Analysis Notes - Saved

File Home Insert Draw View Help Open in browser

Calibri 11 B I U A

Figure 1: Planned versus Actual Progress over Time on a Project

Project Evaluation

In evaluating schedule progress, it is important to bear in mind that some activities possess float, whereas delays in activities on the critical path will cause project delays. In particular, the delay in planned progress at time t may be soaked up in activities' float (thereby causing no overall delay in the project completion) or may cause a project delay. As a result of this ambiguity, it is preferable to update the project schedule to devise an accurate portrayal of the schedule adherence. After applying a scheduling algorithm, a new project schedule can be obtained. It is common that actual durations of activities differ from those estimated. Furthermore, there may be additions or deletions to the scope of the contract that will affect the time at which activities can be started or completed. Schedule updating is a procedure for introducing the latest progress information into the schedule. Data have to be collected on the actual progress of completed activities and those under execution. A completely new estimate of the amount of work remaining to be done should be made for each activity. The probable output of various resources should be assessed. If the job is found to be behind schedule, corrective actions must be made to retrieve position.

4:13

HD 4G 34%

Figure 1: Planned versus Actual Progress over Time on a Project

Project Evaluation

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OneNote lets you capture notes and also serves as a protected repository for any information – images, graphs and designs. Store all your project information in one notebook and access it through Teams anytime!



Tracking Milestones for Invoicing and Payments

Finance Manager

Scenario Walkthrough

The Contoso Finance Manager resourcefully handles invoices and payments for a contractor who has undertaken two office construction projects for Contoso at different locations, all through the ease of communication on Teams.

- Presents the Statement of Work (SOW) to notify team members about completion rates as per agreed timelines.
- Analyses a milestone report tab that contains photos of completion, invoices of purchases made and accumulated workforce hours by trade and more.
- Creates a Smartsheet tab for each site to monitor progress.
- Holds an audio conference to verify progress as per timelines before processing payment for invoices.
- Navigates to the milestone tabs and approves payment upon confirmation of milestone completion.

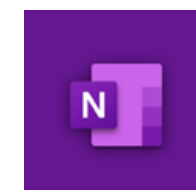
How did Teams help the Finance Manager execute his roles and responsibilities?

- Create, track and assign tasks and milestones with Smartsheet.
- Utilize Word to compile and review data on client SOWs.
- Create and save notes and upload photographs directly in OneNote.

Which app integrations on Teams made it possible?



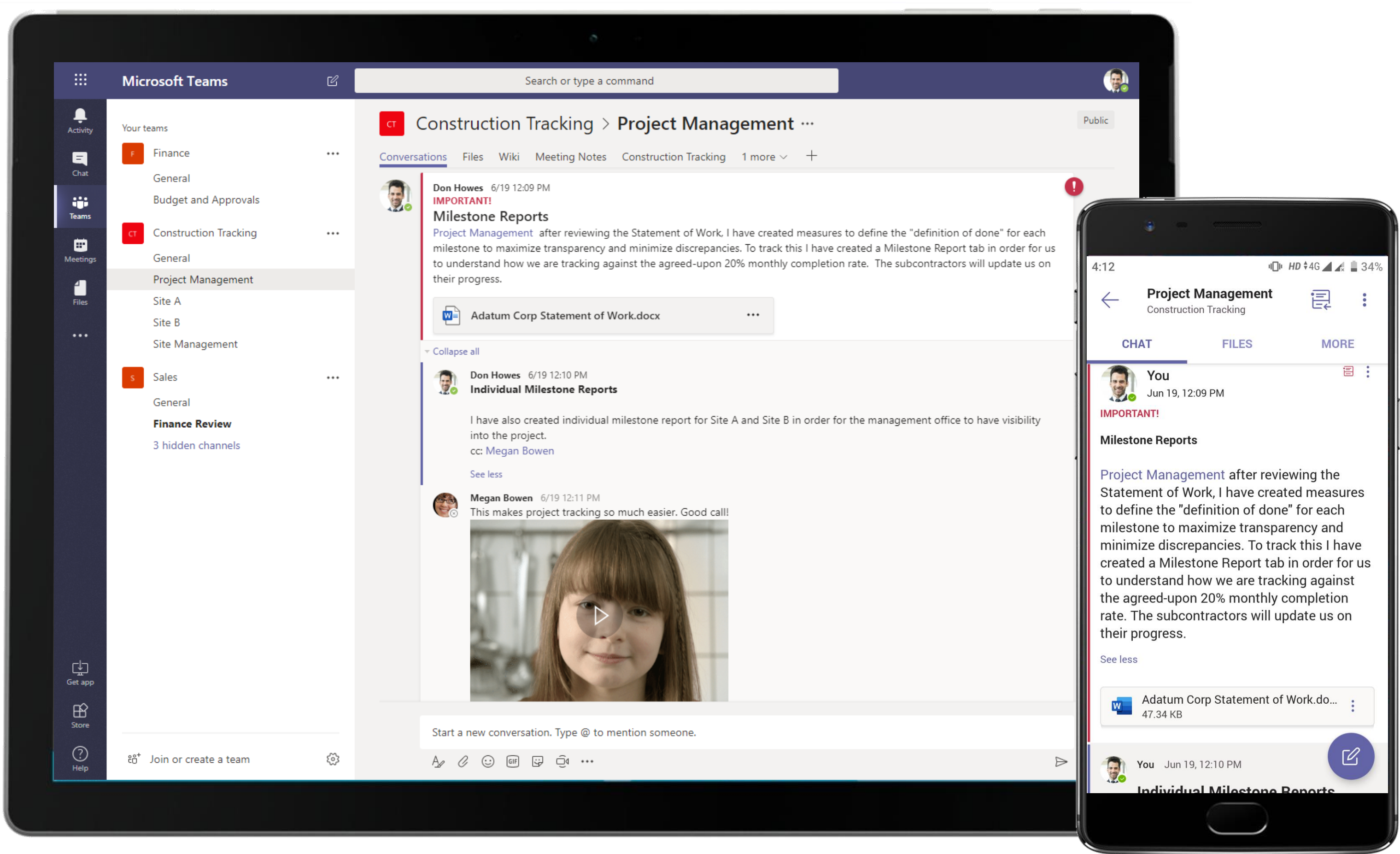
Word



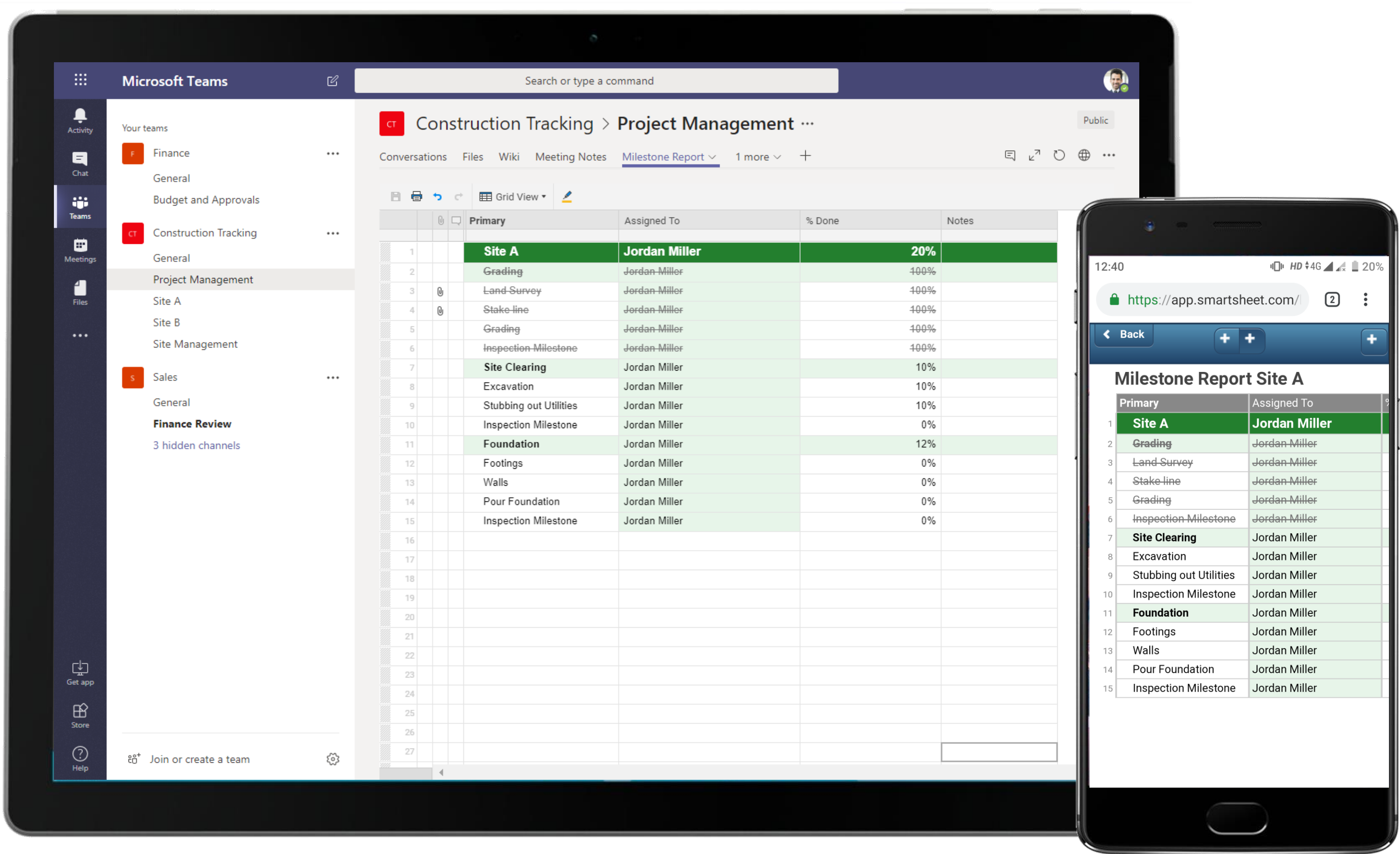
OneNote



Smartsheet



Milestone tracking for plant construction becomes easy with the powerful tools within Teams. Add to that it's diverse communication platform and the Finance Manager can execute project management tasks from within a single workspace.

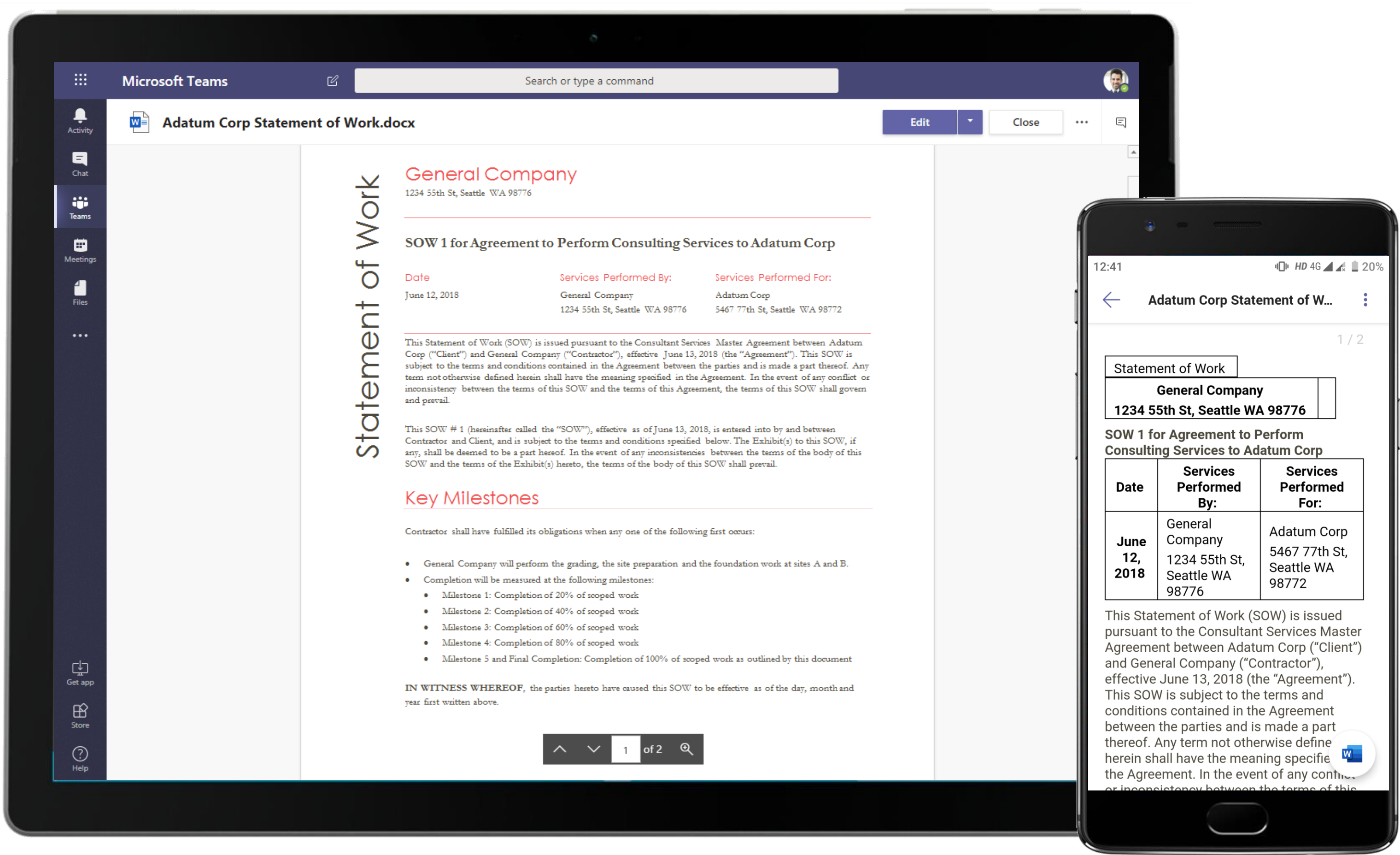


The screenshot displays the Microsoft Teams interface on a tablet and a smartphone. The tablet screen shows the 'Construction Tracking > Project Management' channel with a 'Milestone Report' tab selected. The report is a table with columns: Primary, Assigned To, % Done, and Notes. The data is as follows:

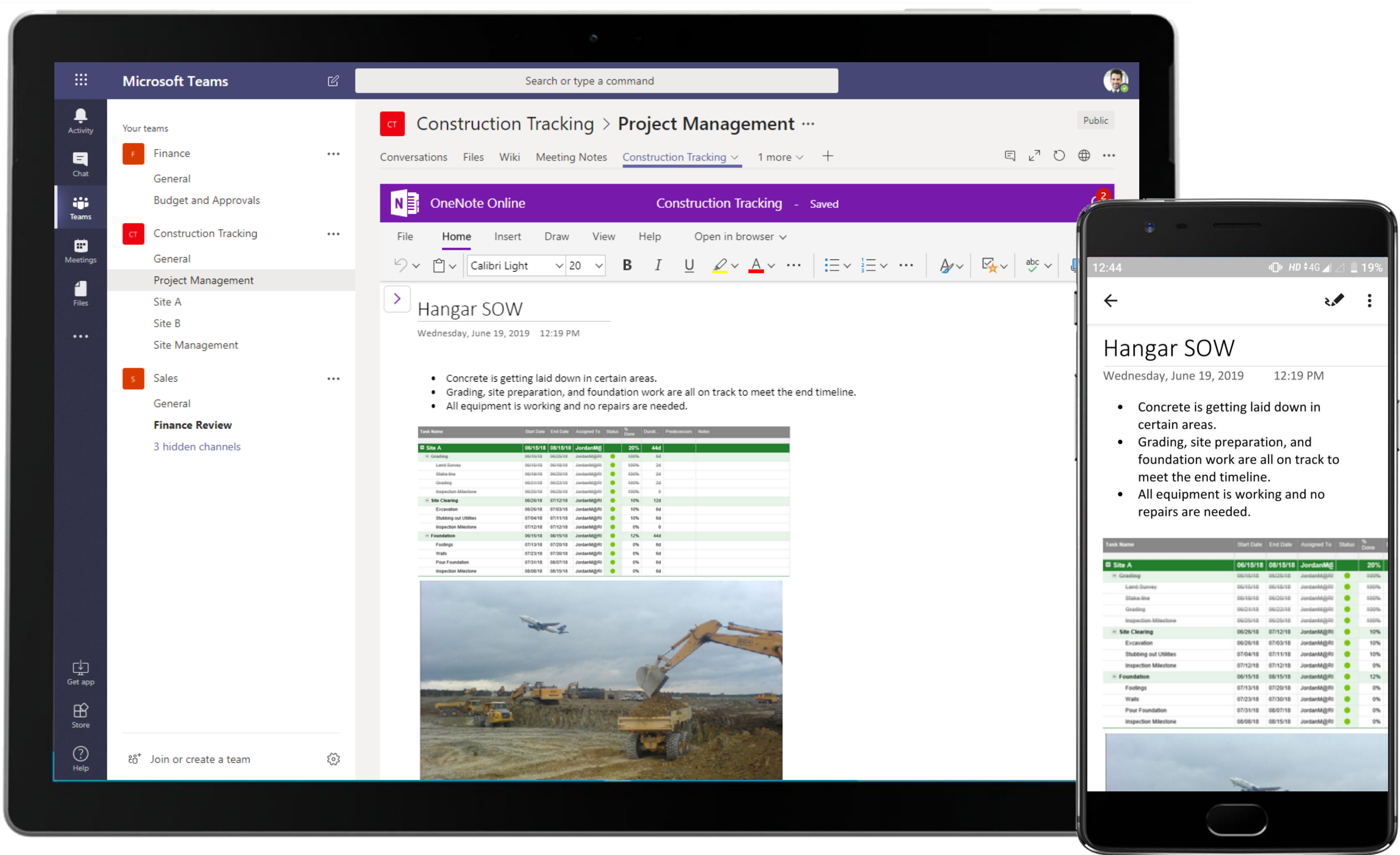
	Primary	Assigned To	% Done	Notes
1	Site A	Jordan Miller	20%	
2	Grading	Jordan Miller	100%	
3	Land Survey	Jordan Miller	100%	
4	Stake line	Jordan Miller	100%	
5	Grading	Jordan Miller	100%	
6	Inspection Milestone	Jordan Miller	100%	
7	Site Clearing	Jordan Miller	10%	
8	Excavation	Jordan Miller	10%	
9	Stubbing out Utilities	Jordan Miller	10%	
10	Inspection Milestone	Jordan Miller	0%	
11	Foundation	Jordan Miller	12%	
12	Footings	Jordan Miller	0%	
13	Walls	Jordan Miller	0%	
14	Pour Foundation	Jordan Miller	0%	
15	Inspection Milestone	Jordan Miller	0%	
16				
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The smartphone screen shows the same 'Milestone Report Site A' in a mobile-optimized view, displaying the same data in a simplified table format.

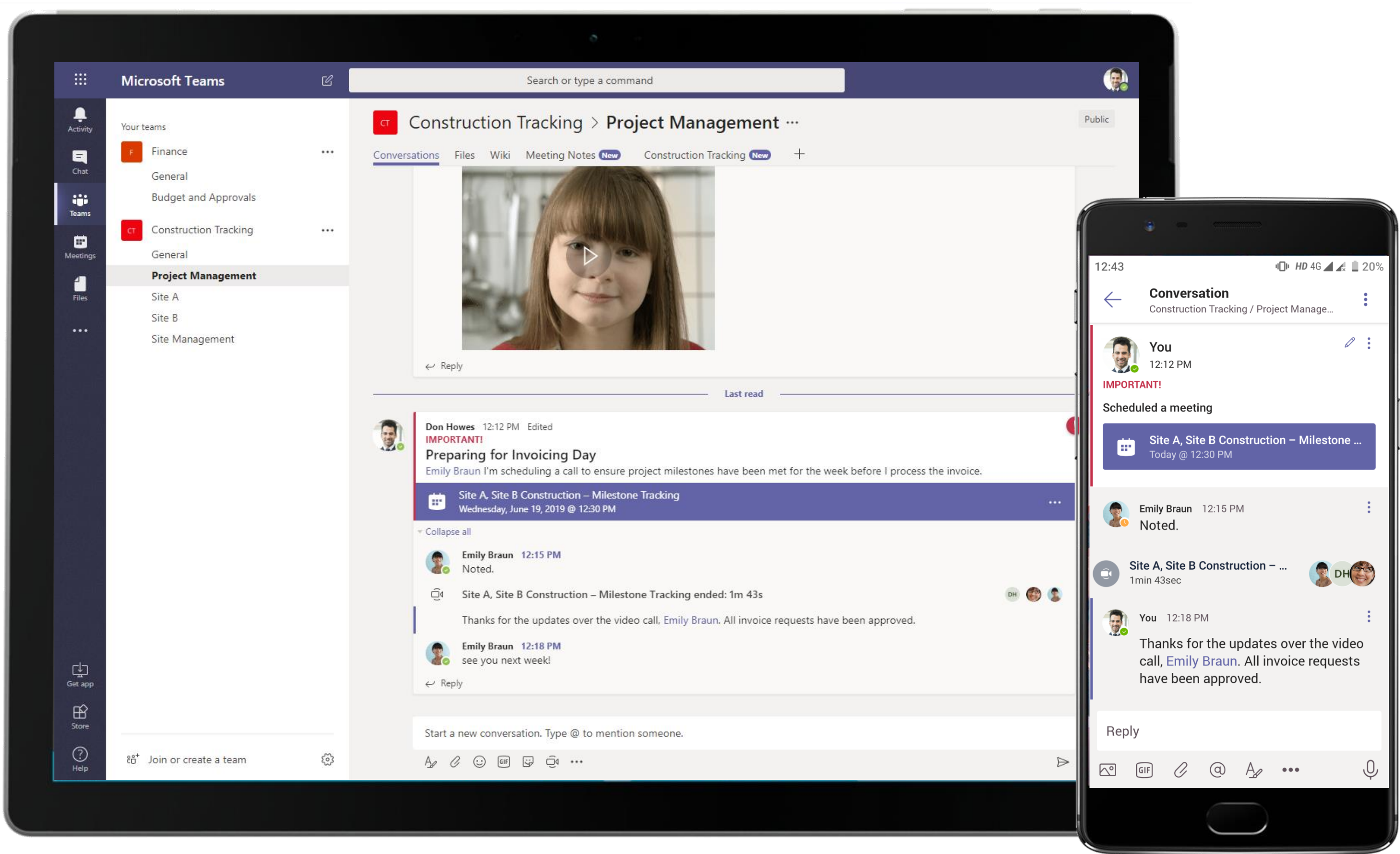
Create, track, and assign tasks and milestones with Smartsheet. The Finance Manager sets up simple and hassle-free milestone report with Smartsheet.



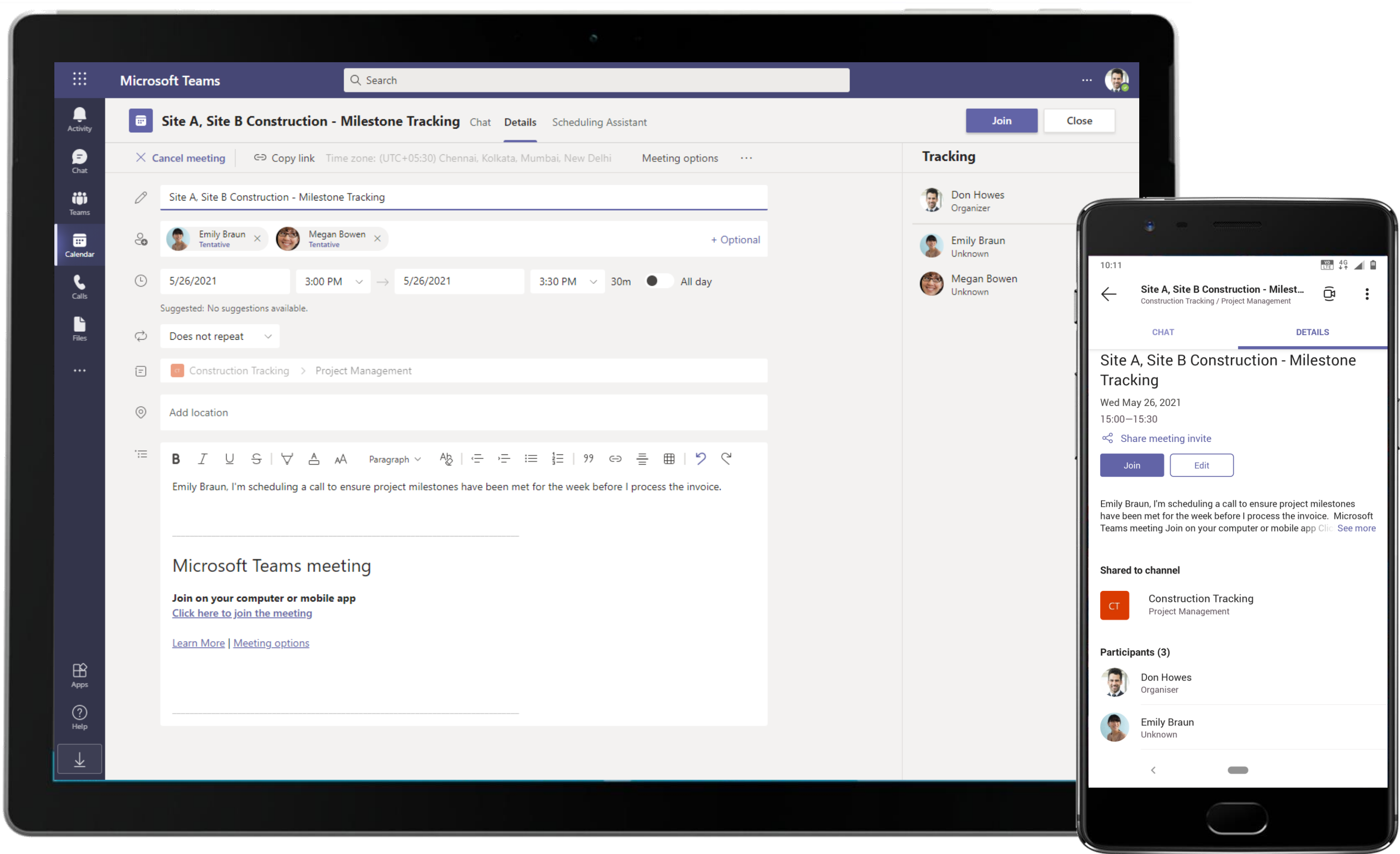
Enjoy document collaboration, creation and editing with the full canvas and toolset of Word in Microsoft Teams. The Finance Manager is able to access shared documents hosted securely in the Files tab.



Add a OneNote tab to your channel in Microsoft Teams and use it as a shared space for notes among team members. The Manager uses it to create and save notes and upload photographs while tracking project milestones.



Microsoft Teams allows the team to communicate in open-channel conversations and keep team members (and guests) up-to-date. The Finance Manager is able to get real-time updates from the contractor in Teams.



Hold seamless calls and conferences and share screens with enterprise security. Using the Scheduling Assistant feature, the Manager can choose an optimal meeting time for all attendees.

Ready to change?

aka.ms/goTeams 

