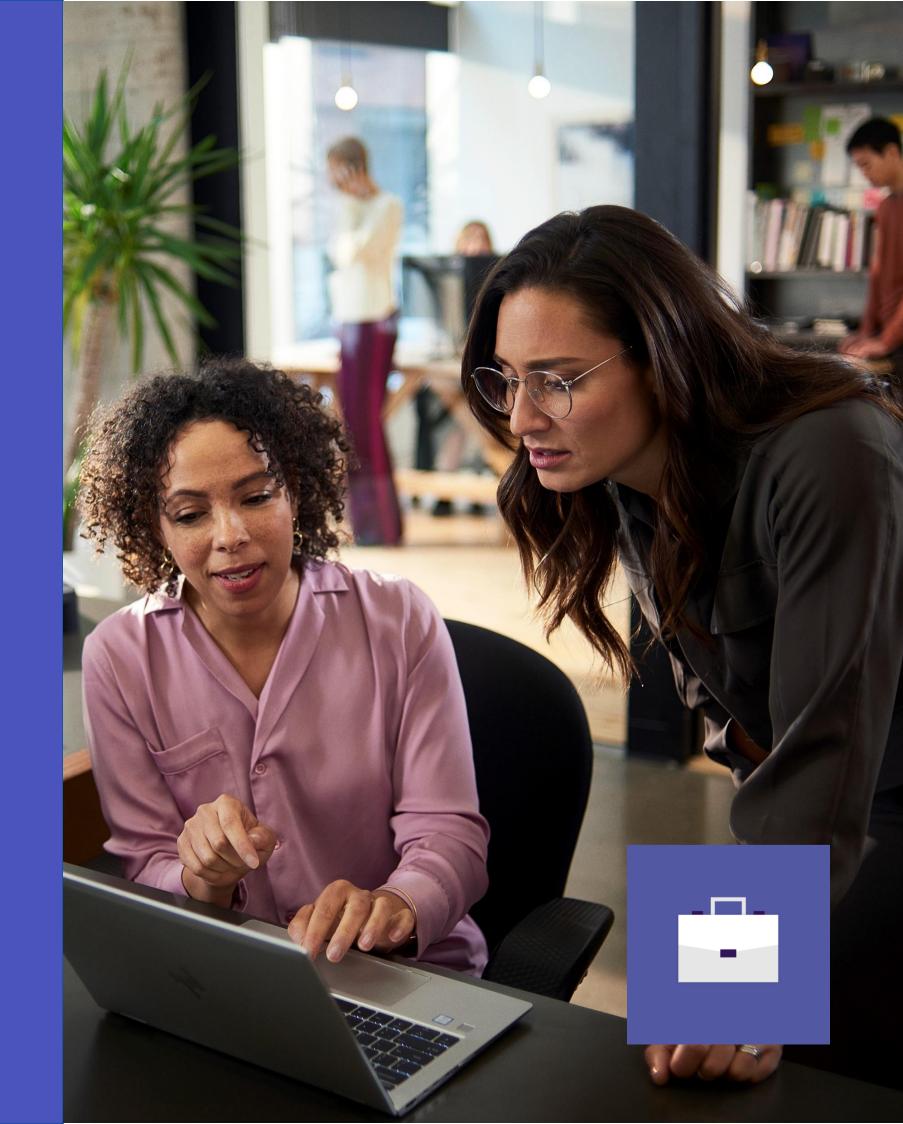


Microsoft Teams for Professional Services

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



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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

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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 ۲
- Firmware Updates ۲
- Troubleshooting & Repairs • Tickets
- Developing a Mobile ۲ Application
- Bug Management •

Finance & Accounts

- Planning Budget for Holiday Giveaways
- Budget Approval ٠
- Reliability and Serviceability
- Tracking Milestones for ۲ Invoicing and Payments









Business Development & Client Relationship

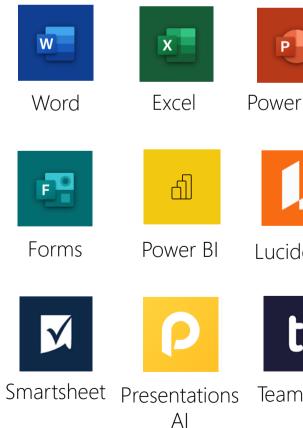
Check out how Project Leads and Delivery Managers can use Microsoft Teams to keep business operations running efficiently and address unexpected situations with confidence.

Business Development & Client Relationship Superpowers in Teams

Capabilities and features used...

- Schedule meetings using synced calendars or a meet now ٠ feature
- Participate in instant, open-channel communication ٠
- 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







		•••	//.
rPoint	OneNote	Asana	monday.com
dchart	Trello	Shifts	MURAL
•	<u>Dr</u>		
nwork	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-٠ 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 ٠ 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. •



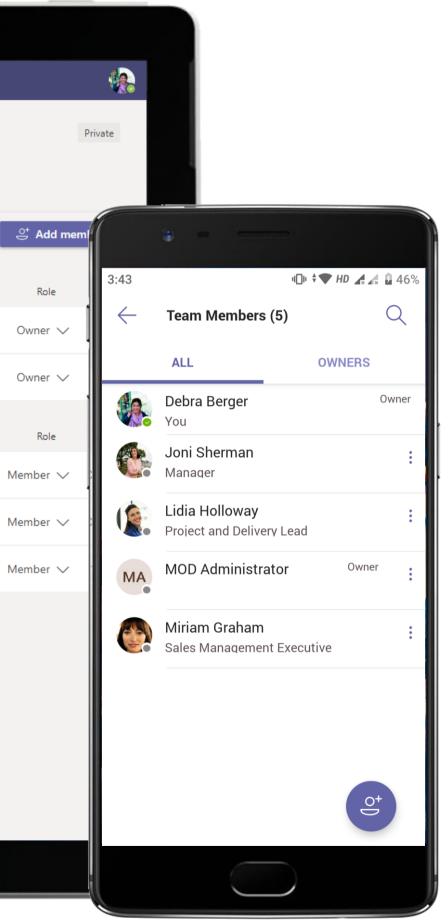
Which app integrations on Teams made it possible?



	Microsoft Teams	Ľ	Search or type a command		
Activity E	Your teams RFP Response - Client X Intrane General		RFP Response - Client X Intran RFP Response - Client X Intranet Redesign Members Pending Requests Channels Settings Apps	net Redesign …	
Teams	Formal Response Materials Opportunity Oral Stage		Search for members Q • Owners (2)		
Files	Business Development General Central BD Region Leadership Team Northwest BD Region		Name Debra Berger MA MOD Administrator	Title Account Manager	Location 18/2107
	Pipeline Southwest BD Region		 Members and guests (3) Name 	Title	Location
	General Budget and Approvals		Miriam Graham	Sales Management Executive Project and Delivery Lead	131/2103 20/2107
			Joni Sherman	Manager	20/1109
Get app Store					
() Help	ະຶö⁺ Join or create a team				

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.

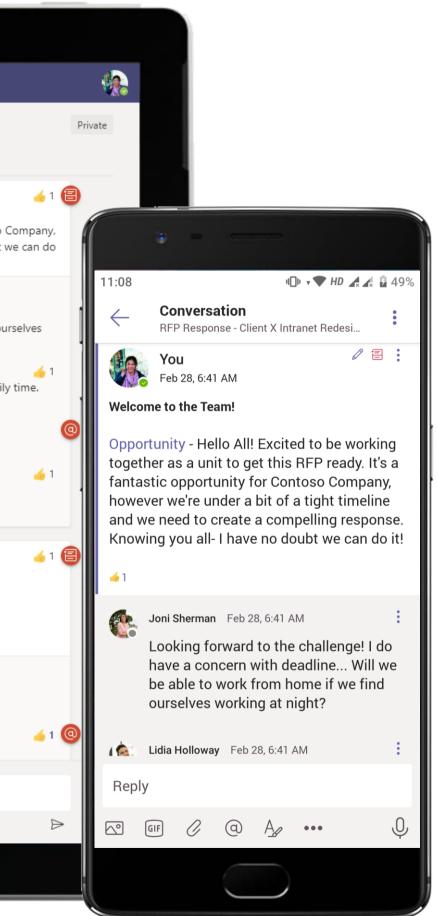


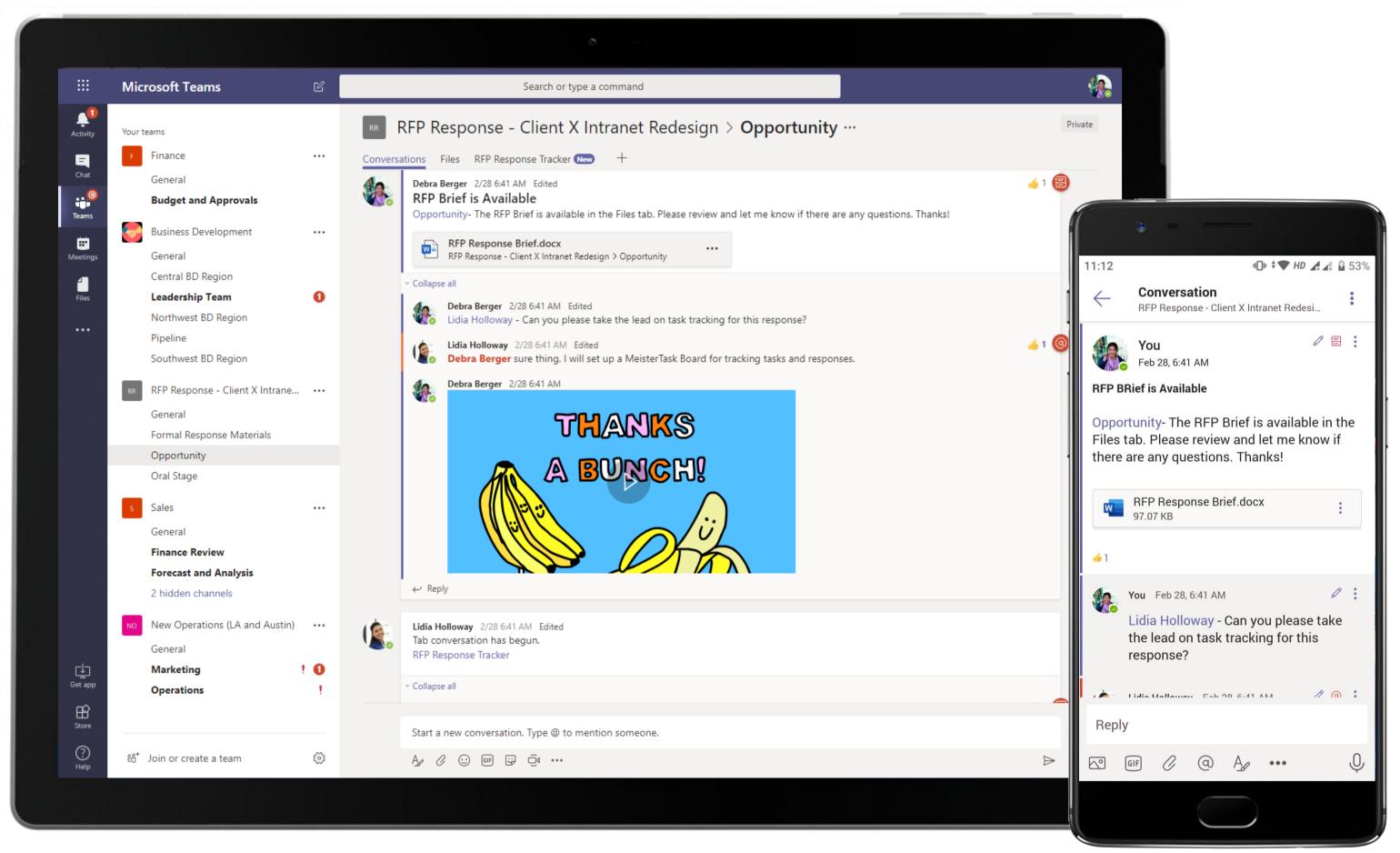


	Microsoft Teams 🛛	Search or type a command
, Activity ⊒1	Your teams RR RFP Response - Client X Intrane •••	R RFP Response - Client X Intranet Redesign > Opportunity … Conversations Files RFP Response Tracker +
Chat Teams	General Formal Response Materials Opportunity	Debra Berger 2/28 6:41 AM Welcome to the Team! Opportunity - Hello All! Excited to be working together as a unit to get this RFP ready. It's a fantastic opportunity for Contoso
 Meetings	Oral Stage Business Development	however we're under a bit of a tight timeline and we need to create a compelling response. Knowing you all- I have no doubt it!
files	General Central BD Region	Joni Sherman 2/28 6:41 AM Looking forward to the challenge! I do have a concern with deadline Will we be able to work from home if we find ou working at night?
	Leadership Team Northwest BD Region Pipeline	Lidia Holloway 2/28 6:41 AM Joni Sherman yes you can certainly work from home. Don't want anyone to feel like they need to take away from famil
	F Finance	Miriam Graham 2/28 6:41 AM Lidia Holloway or Debra Berger Where can I find the latest RFP materials? Debra Berger 2/28 6:41 AM
	General Budget and Approvals	Miriam Graham - Uploading the documents shortly. Will post to this channel once they're ready.
		Debra Berger 2/28 6:41 AM RFP BRief is Available Opportunity - The RFP Brief is available in the Files tab. Please review and let me know if there are any questions. Thanks! Image: RFP Response Brief.docx ***
¢		 Collapse all Debra Berger 2/28 6:41 AM Lidia Holloway - Can you please take the lead on task tracking for this response?
Get app		Lidia Holloway 2/28 6:41 AM Debra Berger sure thing. I will set up a MeisterTask Board for tracking tasks and responses.
Store	టి ⁺ Join or create a team క్రి	Start a new conversation. Type @ to mention someone.
hep		

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.

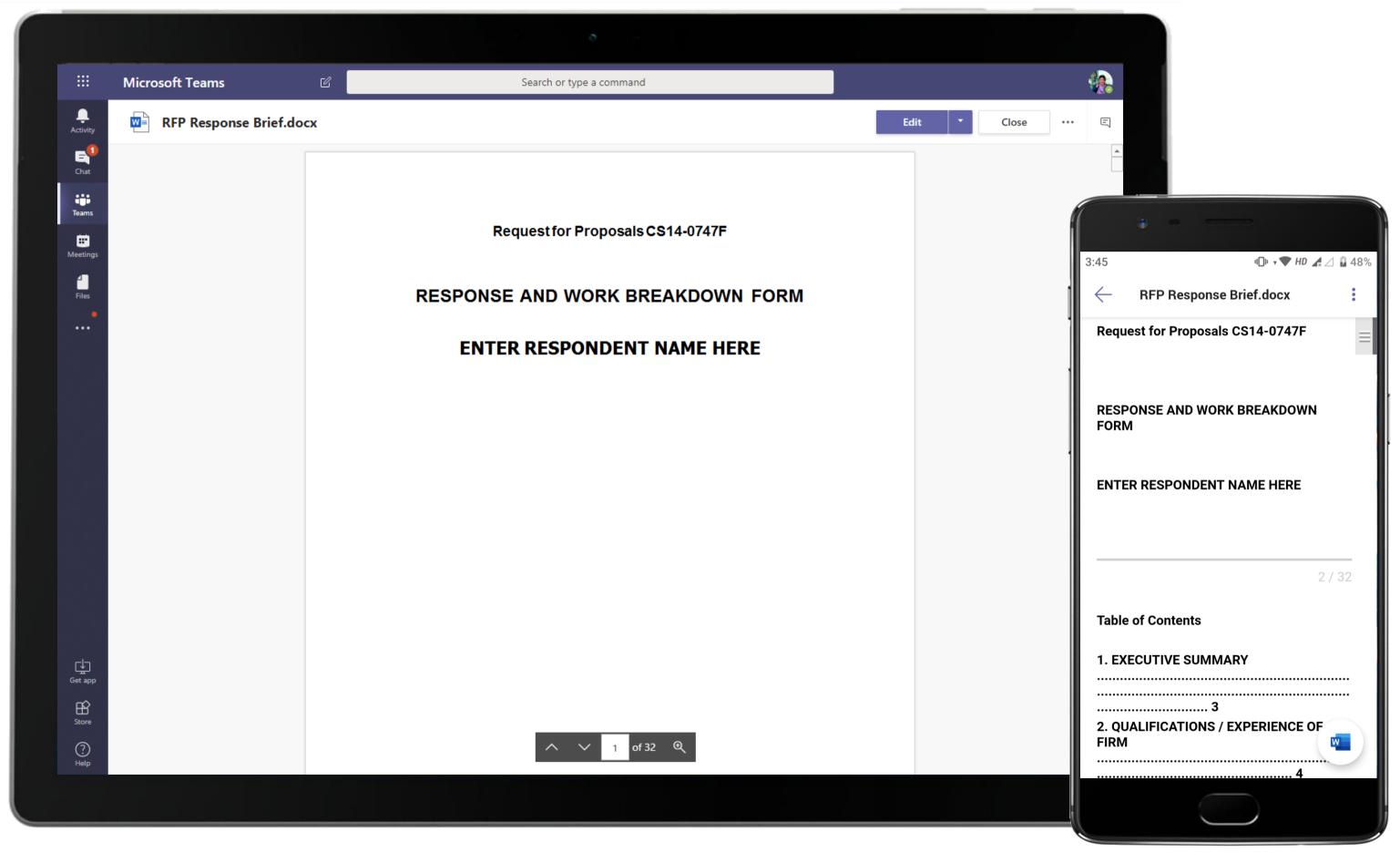






The conversation in the channel continues and stays relevant to the project. The Account Manager shares the RFP brief with the business development team and they discuss setting up a task board to assign process owners.





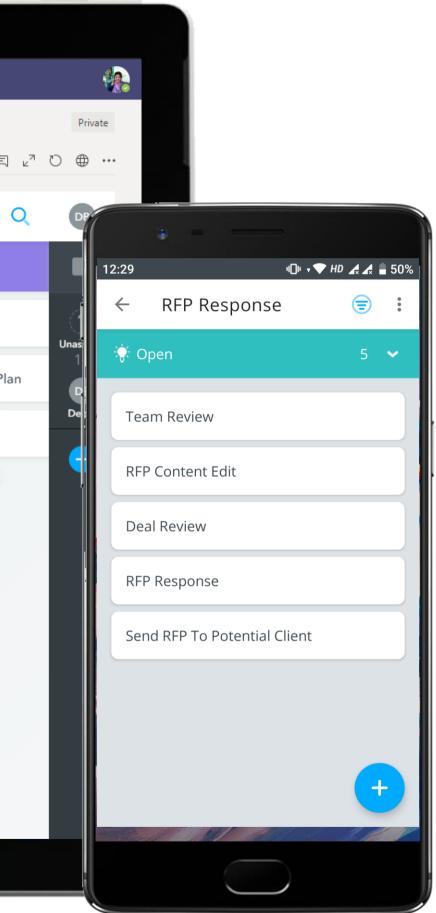
Co-author and edit Word documents within Teams. The RFP brief shared by the Account Manager will be housed in the Files repository for the team's access.

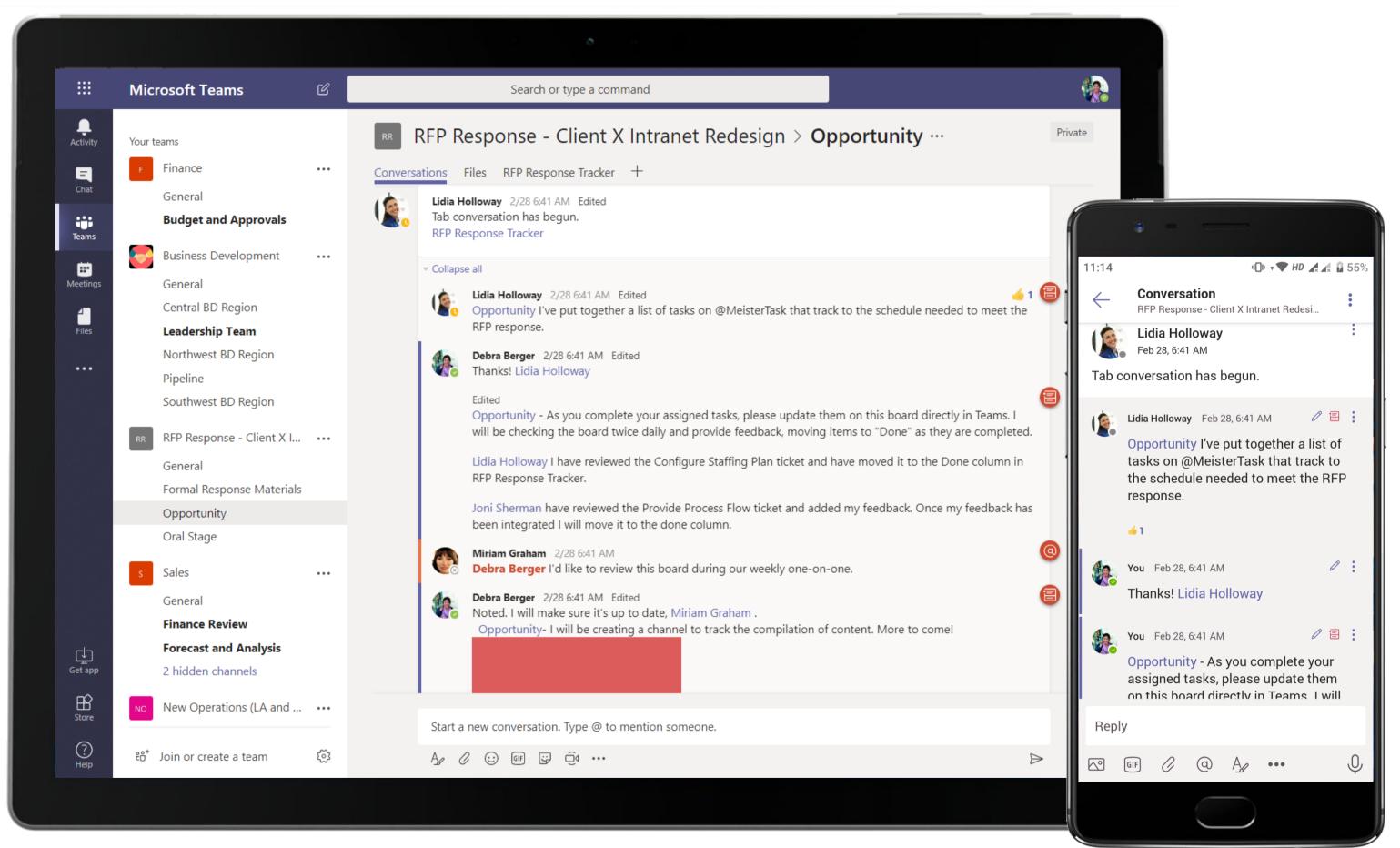


	Microsoft Teams	C	Search or type a con	nmand	
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Chat	General				
eams	Budget and Approvals		RFP Response i		o 💫
Ē	Business Development	•••	× 0		
Meetings	General		🔅 Open 5	-∕r- In Progress	2 🖌 Done
4	Central BD Region	-			
Files	Leadership Team	0	Team Review	Built Out Cost Estimates	Build RFP Plan
•••	Northwest BD Region				
	Pipeline Southwest BD Region		RFP Content Edit	Provide Process Flow	Configure Staffing Pla
	RR RFP Response - Client X Intrane	•••	Deal Review	+	Remove RFP
	General				
	Formal Response Materials		RFP Response		+
	Opportunity				
	Oral Stage		Send RFP To Potential Client		
	s Sales	•••	Send Kirl for otential client		
	General		+		
	Finance Review				
	Forecast and Analysis				
	2 hidden channels				
	NO New Operations (LA and Austin)				
÷	General				
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B Store	Operations	1			
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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.

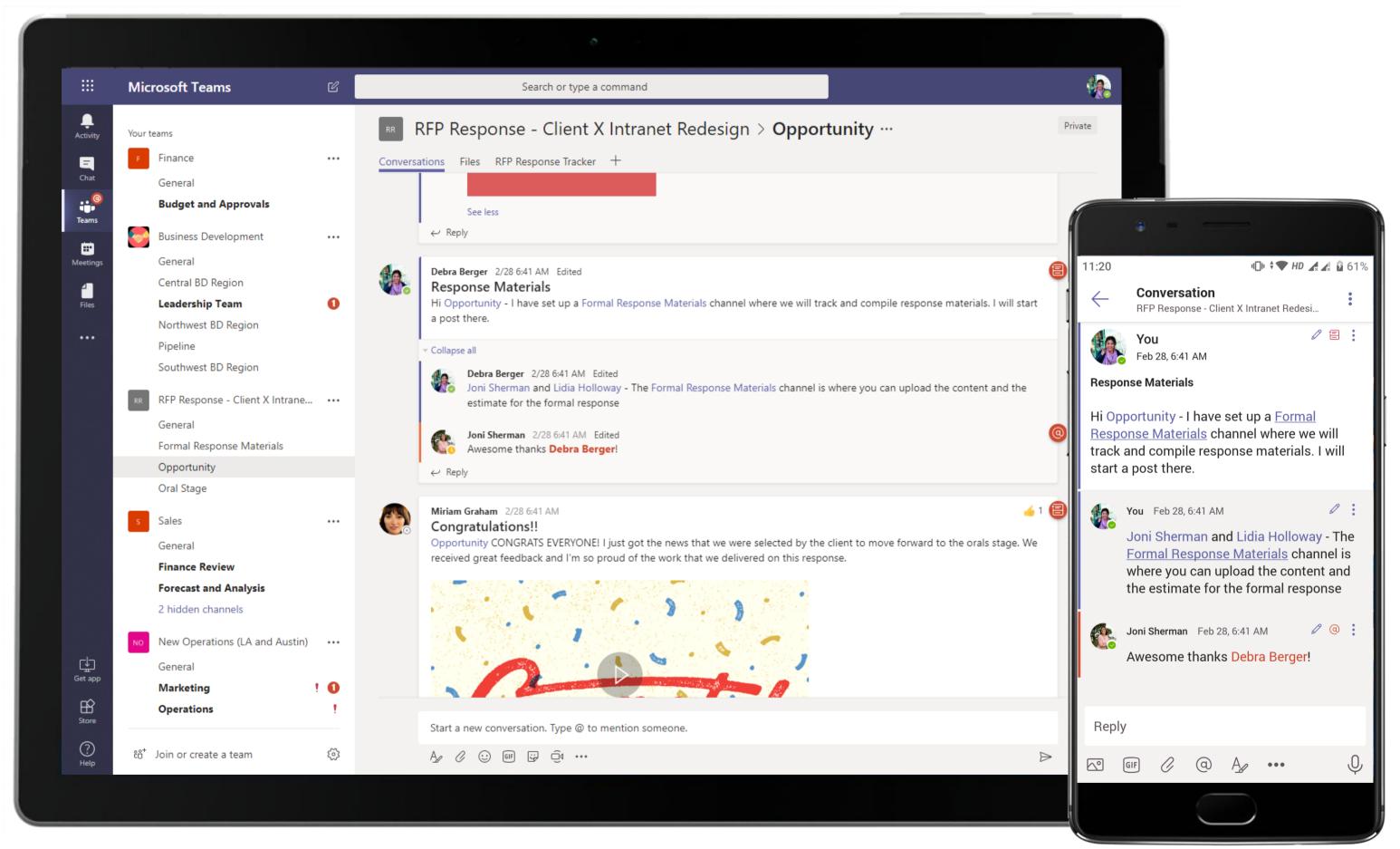
How did Teams help the Account Manager execute her roles and responsibilities?

- 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.



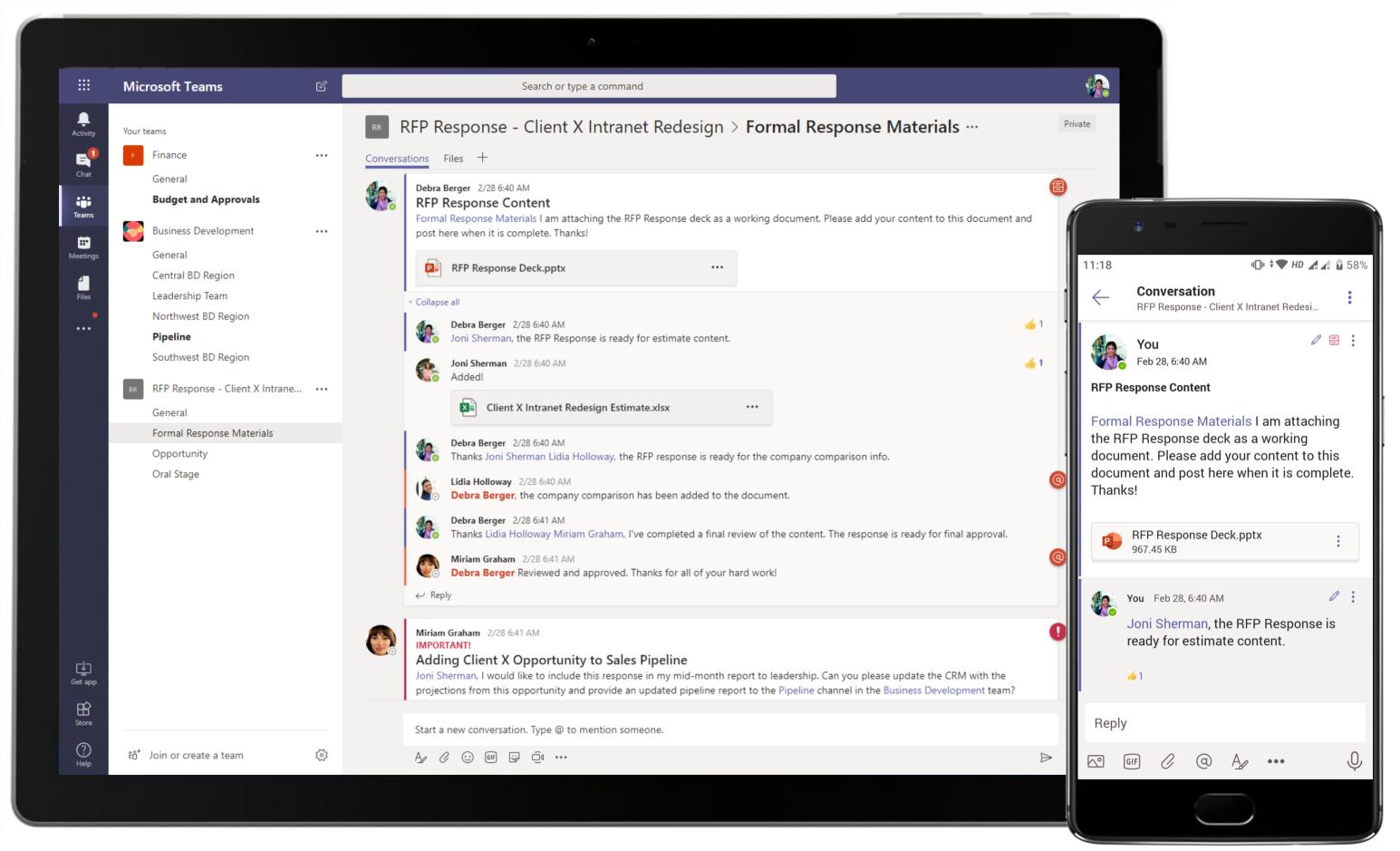






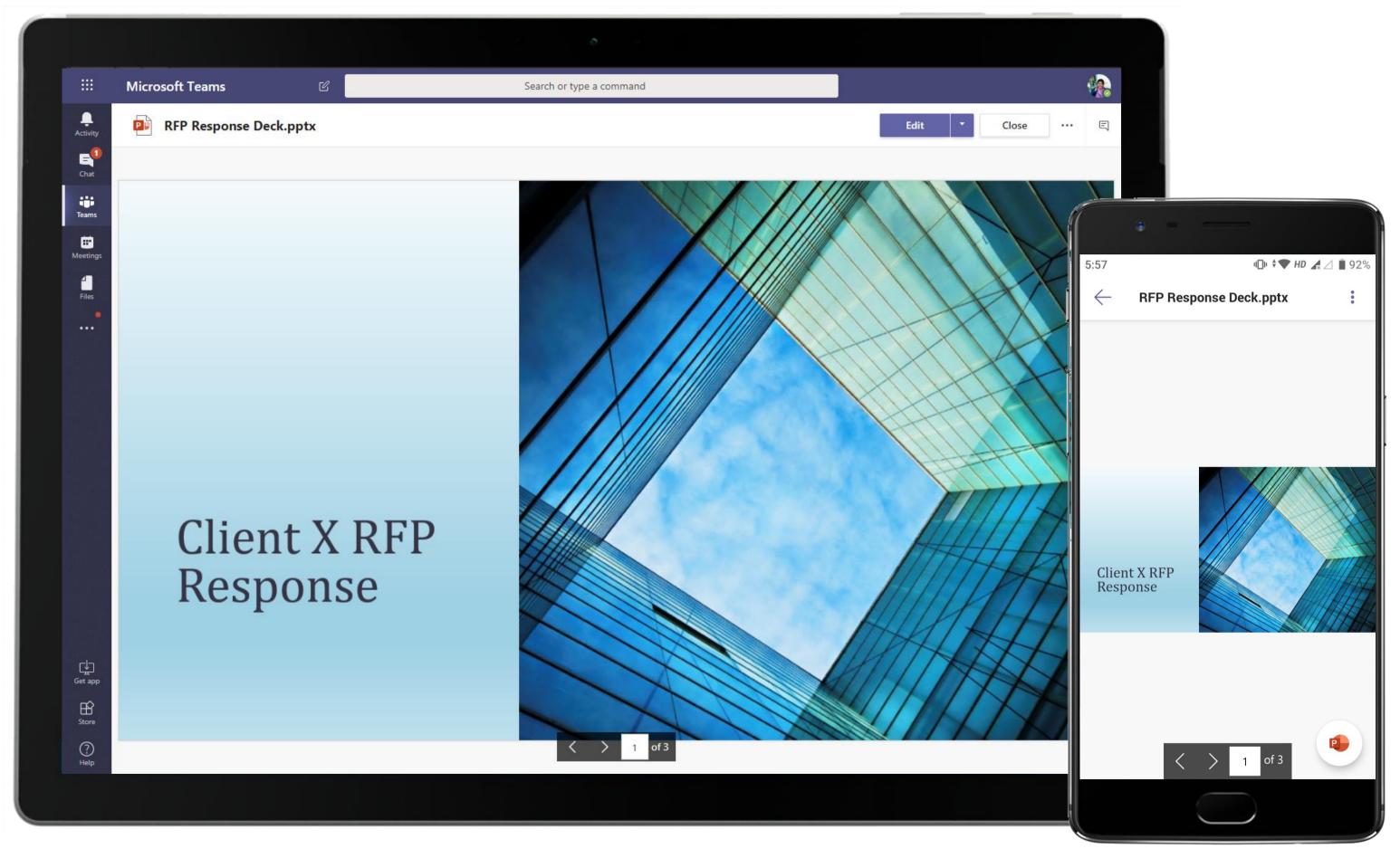
Teams and channels are where you hold meetings, have conversations and work on files together with team members. They are built around a topic, like "Formal Response Material," a department name, or even just for fun.





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.





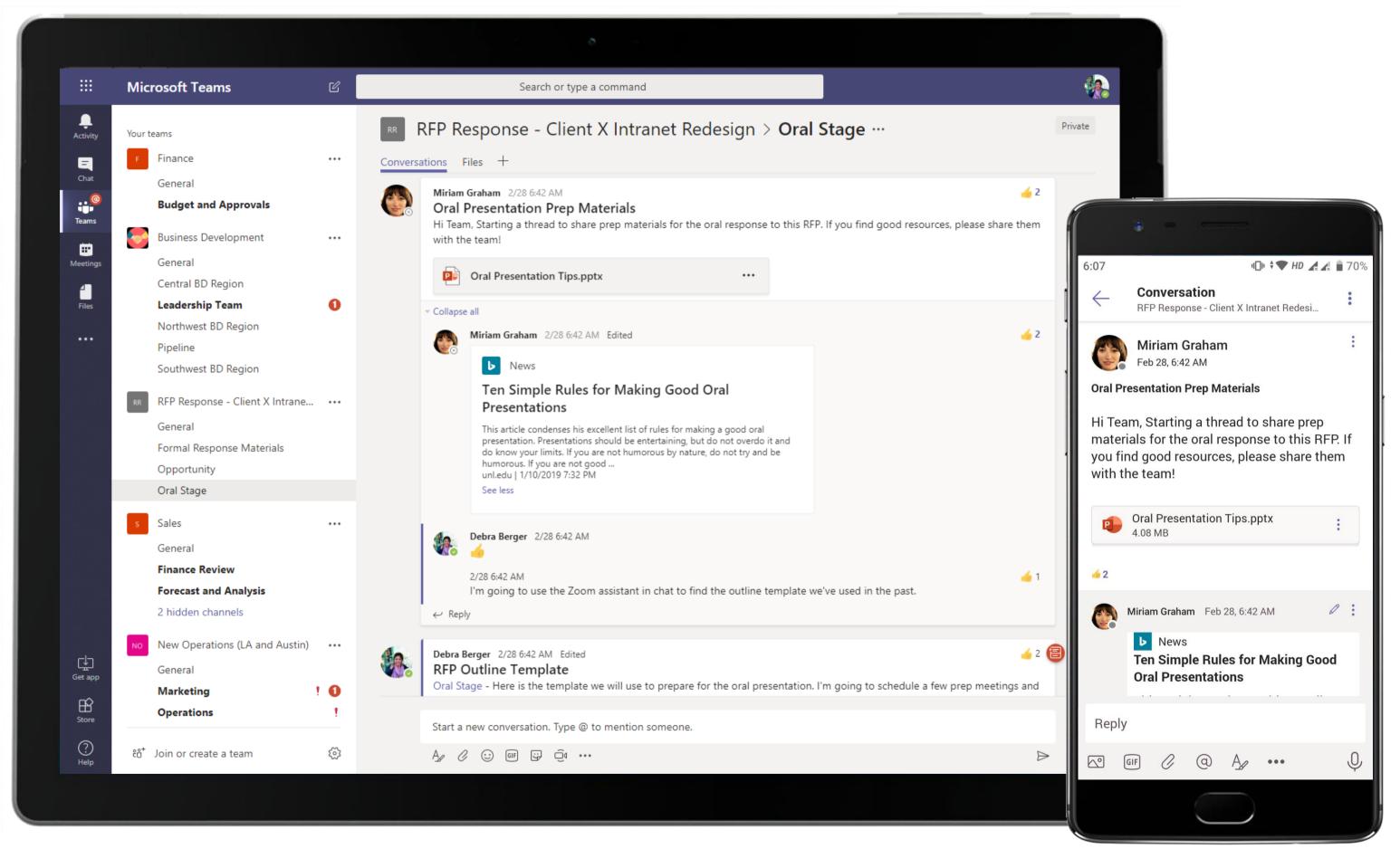
Edit your presentation and customize it on the go, collaborating with others in real time within Teams. The Account Manager shares the proposal PowerPoint deck as a working file for the team to work on.



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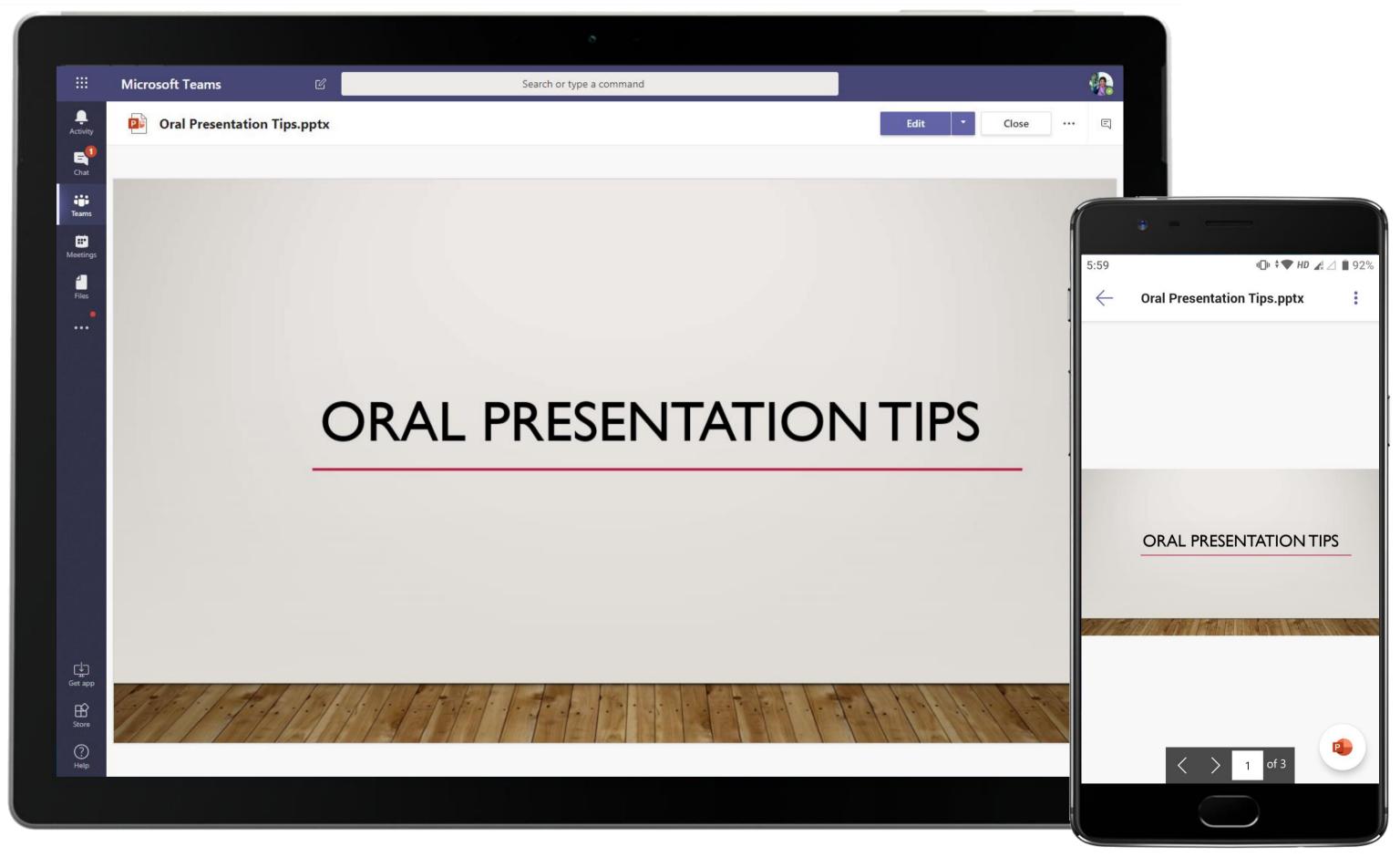
Use Excel's analytical abilities within Teams to build reports and share them with your team. The Account Manager assigns resource management estimate to a Project Manager and reviews the estimate shared in an Excel file.





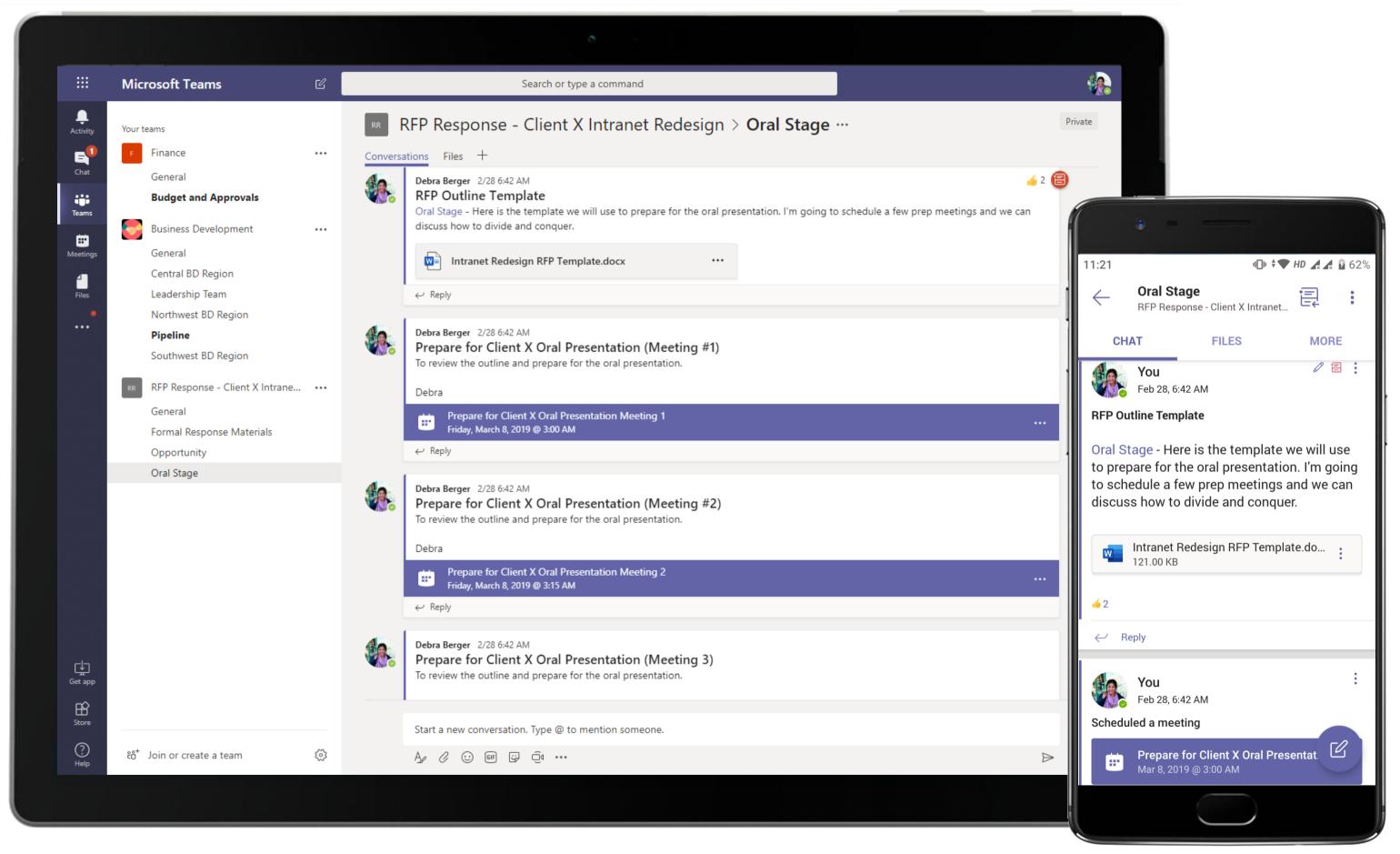
Share snippets of relevant news within the channel using the News app travelling with the user in the compose box of Teams, which allows you to keep your team in the loop as well as engage them with important or interesting stories.





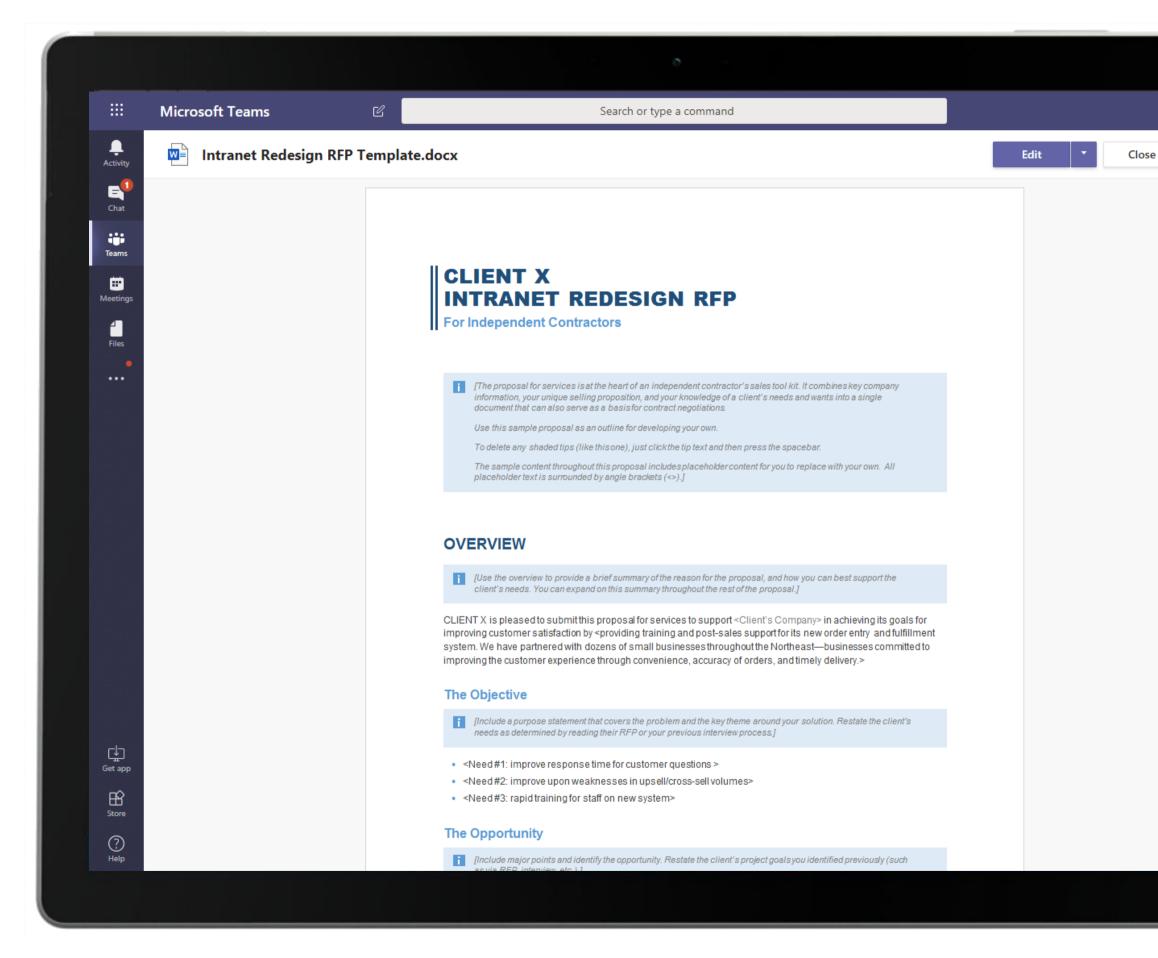
Along with a relevant news article, a Sales Exec shares a PowerPoint deck for team members to help prepare for the oral stage of the RFP. The deck stays housed within the channel's Files tab, from where it can be accessed for any future needs as well.





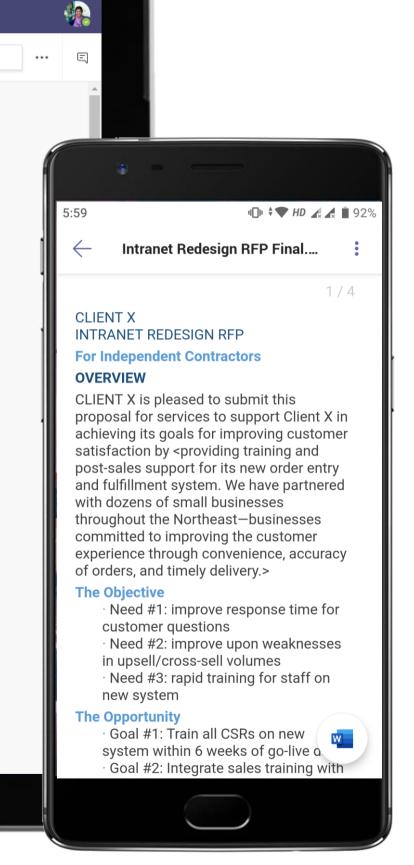
The Account Manager moves the conversation to a new channel to keep conversations relevant to the oral stage of the RFP presentation and uses the channel for regular sync calls to prepare team members.





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.

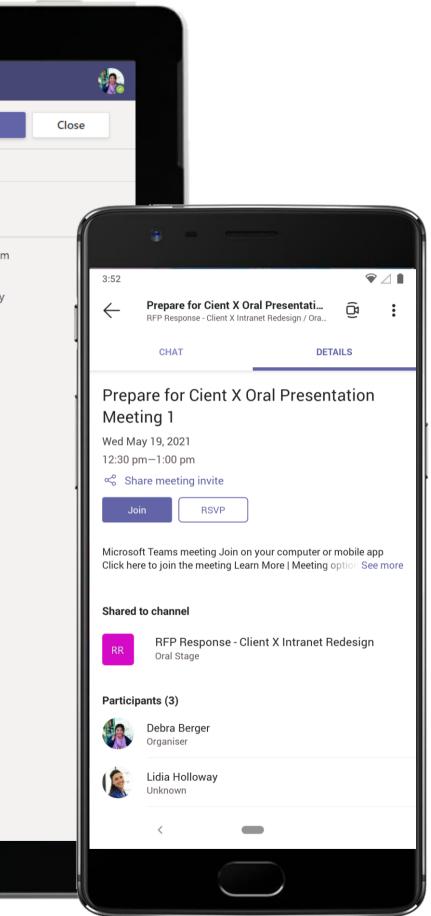


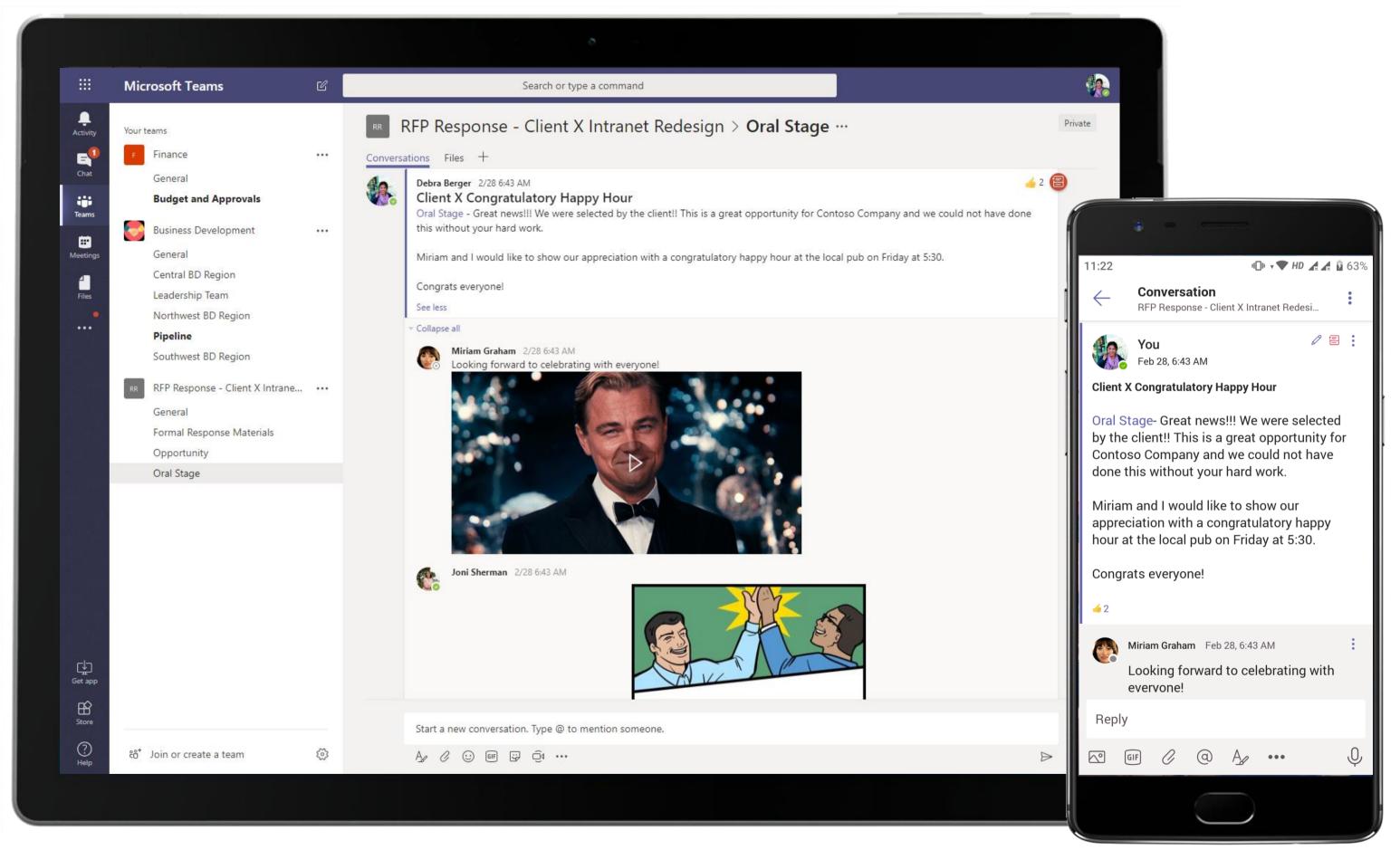


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iii) Teams	0	Prepare for Cient X Oral Presentation Meeting 1	Debra Berger Organizer
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		Microsoft Teams meeting	
		Join on your computer or mobile app <u>Click here to join the meeting</u>	
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Meetings 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.

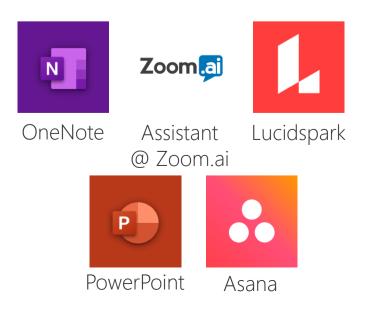
- Initiates a conversation and meeting with design experts and team members in the channel to discuss details of the workshop.
- Assimilates meeting outcome in a OneNote tab. •
- Uses Zoom.ai to track down an infographic for workshop attendees and uses Lucidspark whiteboard to sketch ideas. ۲
- Creates 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. ٠

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. ٠
- Use of Zoom.ai to quickly track down files without derailing other tasks at hand. ٠
- Harness the power of bots and apps within Teams to achieve better business outcomes. •



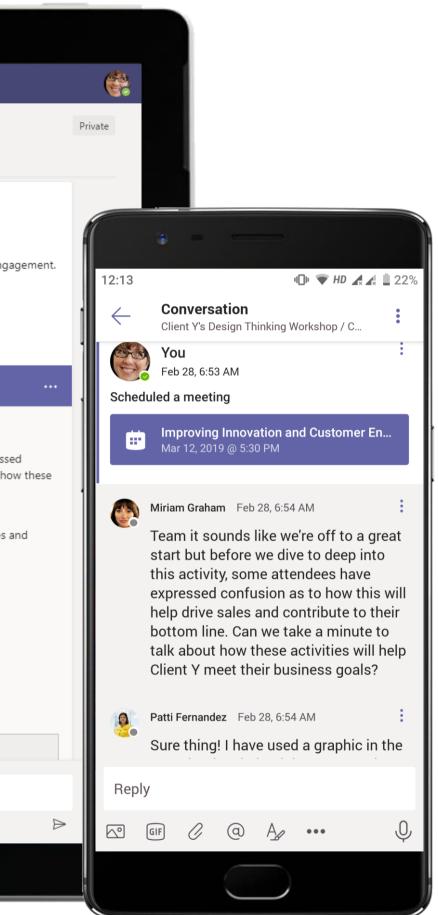
Which app integrations on Teams made it possible?



	Microsoft Teams Our teams Client Y's Design Thinking Wor General Collaborative Workshop Workshop Task Management Construction Tracking General Project Management Site A 2 hidden channels		Search or type a command Image: Client Y's Design Thinking Workshop > Collaborative Workshop ··· Conversations Files Design Thinking Workshop Su Design Thinking Notes + Image: Rowen 2/28 6:53 AM Improving Innovation and Customer Engagement Hi Team, We will be going through a series of design thinking activities designed to help Client Y improve innovation and customer end	enga
Activity Yo Chat	Client Y's Design Thinking Wor General Collaborative Workshop Workshop Task Management Construction Tracking General Project Management Site A 2 hidden channels		Conversations Files Design Thinking Workshop Su Design Thinking Notes + Improving Innovation and Customer Engagement Hi Team, We will be going through a series of design thinking activities designed to help Client Y improve innovation and customer end	enga
Chat Chat Teams Meetings Files	General Collaborative Workshop Workshop Task Management Construction Tracking General Project Management Site A 2 hidden channels		Megan Bowen 2/28 6:53 AM Improving Innovation and Customer Engagement Hi Team, We will be going through a series of design thinking activities designed to help Client Y improve innovation and customer end	enga
Teams Meetings Files	Collaborative Workshop Workshop Task Management Construction Tracking General Project Management Site A 2 hidden channels		Improving Innovation and Customer Engagement Hi Team, We will be going through a series of design thinking activities designed to help Client Y improve innovation and customer end	enga
Meetings	General Project Management Site A 2 hidden channels			enga
Files	Site A 2 hidden channels		Thanks,	
			Megan See less	
	F Finance		Improving Innovation and Customer Engagement Tuesday, March 12, 2019 @ 5:30 PM	
	General	! 0	▼ Collapse all	
	Budget and Approvals EP Employee Portal Mobile App General App Review and Delivery Daily Stand-Up		 Miriam Graham 2/28 6:54 AM Team it sounds like we're off to a great start but before we dive to deep into this activity, some attendees have exprision as to how this will help drive sales and contribute to their bottom line. Can we take a minute to talk about activities will help Client Y meet their business goals? Patti Fernandez 2/28 6:54 AM Sure thing! I have used a graphic in the past that has helped demonstrate how this type of activity will help drive sales contribute to their bottom line. Let me use the Zoom.ai bot to find it and share it with you. 	ut hc
	3 hidden channels		Assistant @ Zoom.aiAssistant @ Zoom.ai.ai what documents can I generate?	
Hi	lidden teams		 Patti, here are the documents you are able to generate: design thinking info graphic Patti Fernandez 2/28 6:54 AM Assistant @ Zoom.aiAssistant @ Zoom.ai.ai generate design thinking info graphic document 	
Get app			Assistant @ Zoom.ai 2/28 6:54 AM	
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Store			Start a new conversation. Type @ to mention someone.	
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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.

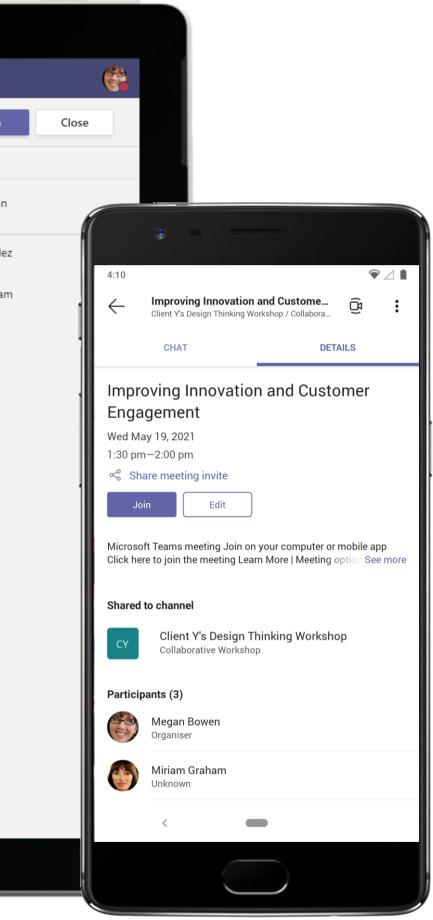




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Teams	0	Improving Innovation and Customer Engagement	Megan Bower Organizer
 Calendar	୍ତ	Patti Fernandez × Miriam Graham × + Optional	Patti Fernande Unknown
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		Learn More Meeting options	
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The 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.

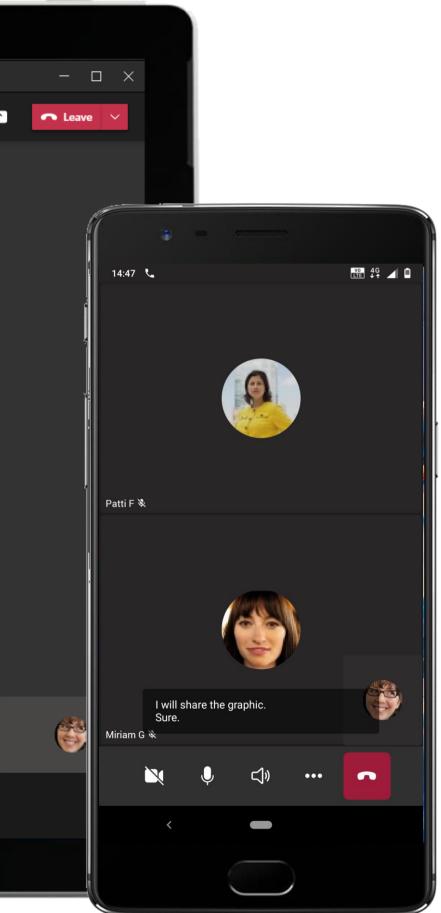




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Teams can detect what's said in a meeting and present real-time captions. When enabled, the live captions will include speaker attribution—so you'll see not only what's being said, but who's saying it.

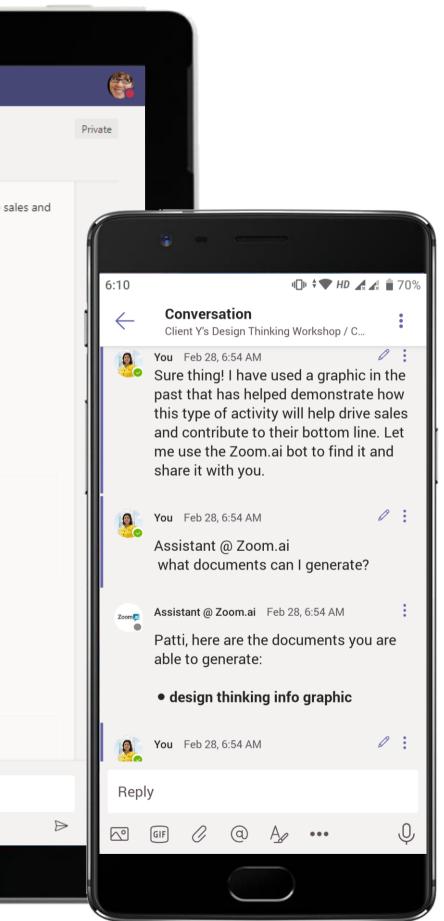


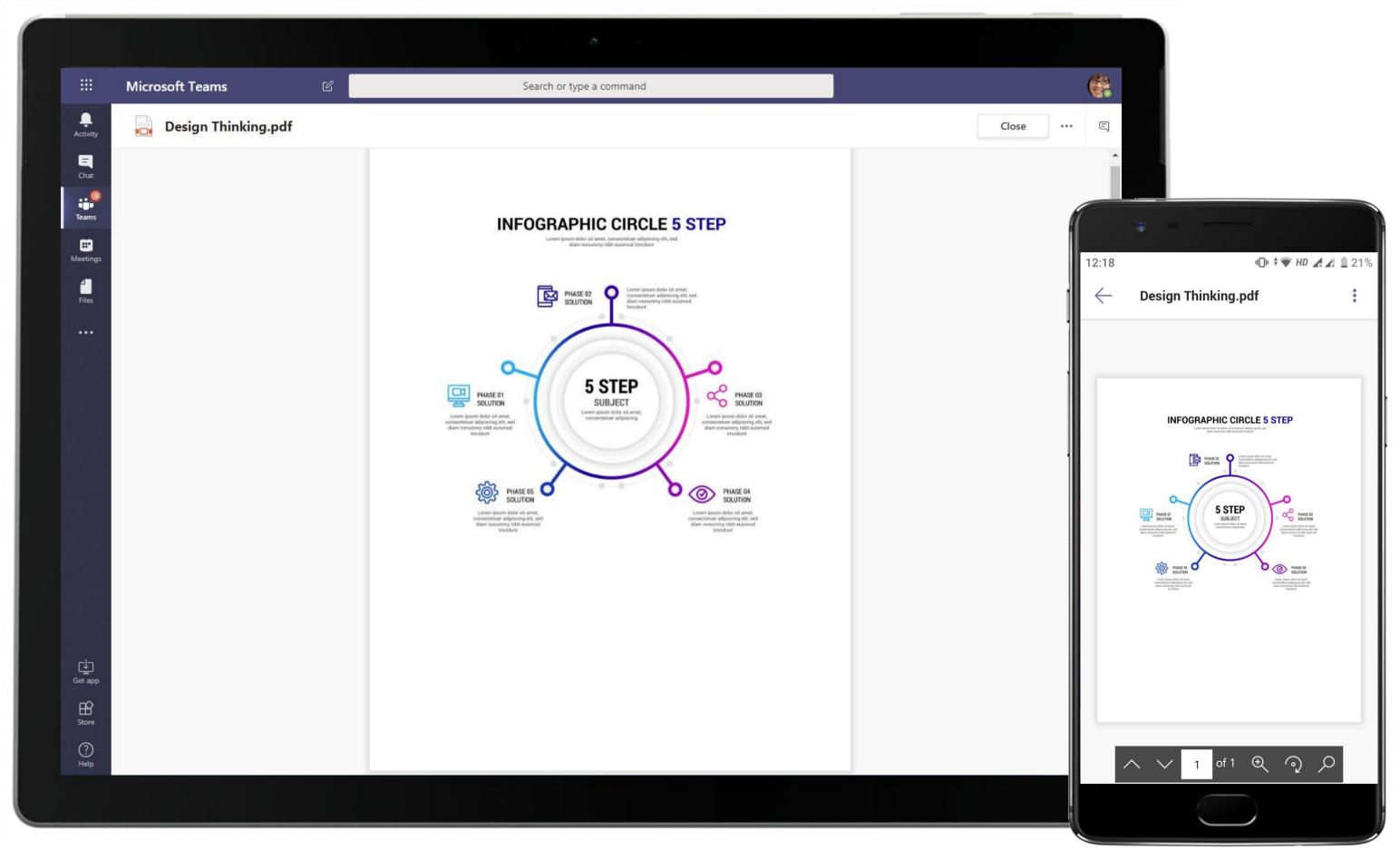


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L Activity	Your teams		Client Y's Design Thinking Workshop > Collaborative Workshop …	
E Chat	cz Client Z Project General		Conversations Files Design Thinking Workshop Su Design Thinking Notes + Patti Fernandez 2/28 6:54 AM Edited Sure thing! I have used a graphic in the past that has helped demonstrate how this type of activity will help drive	
Teams	Delivery Onboarding Steering Committee	0	contribute to their bottom line. Let me use the Zoom.ai bot to find it and share it with you. Edited Assistant @ Zoom.ai what documents can I generate?	
Meetings Files	Northwest Experience Desig		Assistant @ Zoom.ai 2/28 6:54 AM Patti, here are the documents you are able to generate: • design thinking info graphic	
	Client Y's Design Thinking Wor General Collaborative Workshop	•••	Patti Fernandez 2/28 6:54 AM Edited Assistant @ Zoom.ai generate design thinking info graphic document	
	Workshop Task Management	0	Assistant @ Zoom.ai 2/28 6:54 AM	
	Employee Portal Mobile App General App Review and Delivery Daily Stand-Up Engineering and Development Pull Requests		Are you sure you want me to generate the DESIGN THINKING INFO GRAPHIC document? Yes No	
	UX Design NO New Operations (LA and Austin) ME Major Events Team		Patti Fernandez 2/28 6:54 AM Edited Assistant @ Zoom.ai Yes	
Get app	Рк Pop-Up Kiosk Planning General Marketing		Assistant @ Zoom.ai 2/28 6:54 AM Here is your DESIGN THINKING INFO GRAPHIC document; https://zoom.ai/go/Y5QH9d	
Store	Pop-Up 1		Start a new conversation. Type @ to mention someone.	
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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.



	Microsoft Teams	Q Search	
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Apps	Knowledge Share Opportunities		🖡 Lucidspark 🔷
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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.



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Files	Project Management Site A 2 hidden channels		Design Thinking Notes Wednesday, June 6, 2018 9:32 AM	
	F Finance General Budget and Approvals	 ! 0	Date: 06/06/2018 Attendees: Miriam Graham, Megan Bowen, Allan Deyoung, Patti Fernandez, Johanna Lorenz Time: 2:00-4:00 Topic: Improving innovation and customer engagement.	
	 Employee Portal Mobile App General App Review and Delivery Daily Stand-Up 3 hidden channels 		 Notes: Effectively explained why design thinking is important and how it can help. Utilized freehand by InVision to create a brainstorming exercise. Identified areas that are holding back innovation. Created an action plan to help raise customer engagement. 	
н	IT Administration		 Successfully utilized Mural and came up with 70 different ideas to help improve innovation and customer engagement. Follow up with internal team to narrow down ideas and pick which ones to move forward with 	
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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.



Design Thinking Notes

Wednesday, June 6, 2018

9:32 AM

2.

Date: 06/06/2018 Attendees: Miriam Graham, Megan Bowen, Allan Deyoung, Patti Fernandez, Johanna Lorenz **Time**: 2:00-4:00 Topic: Improving innovation and customer engagement.

Notes:

(

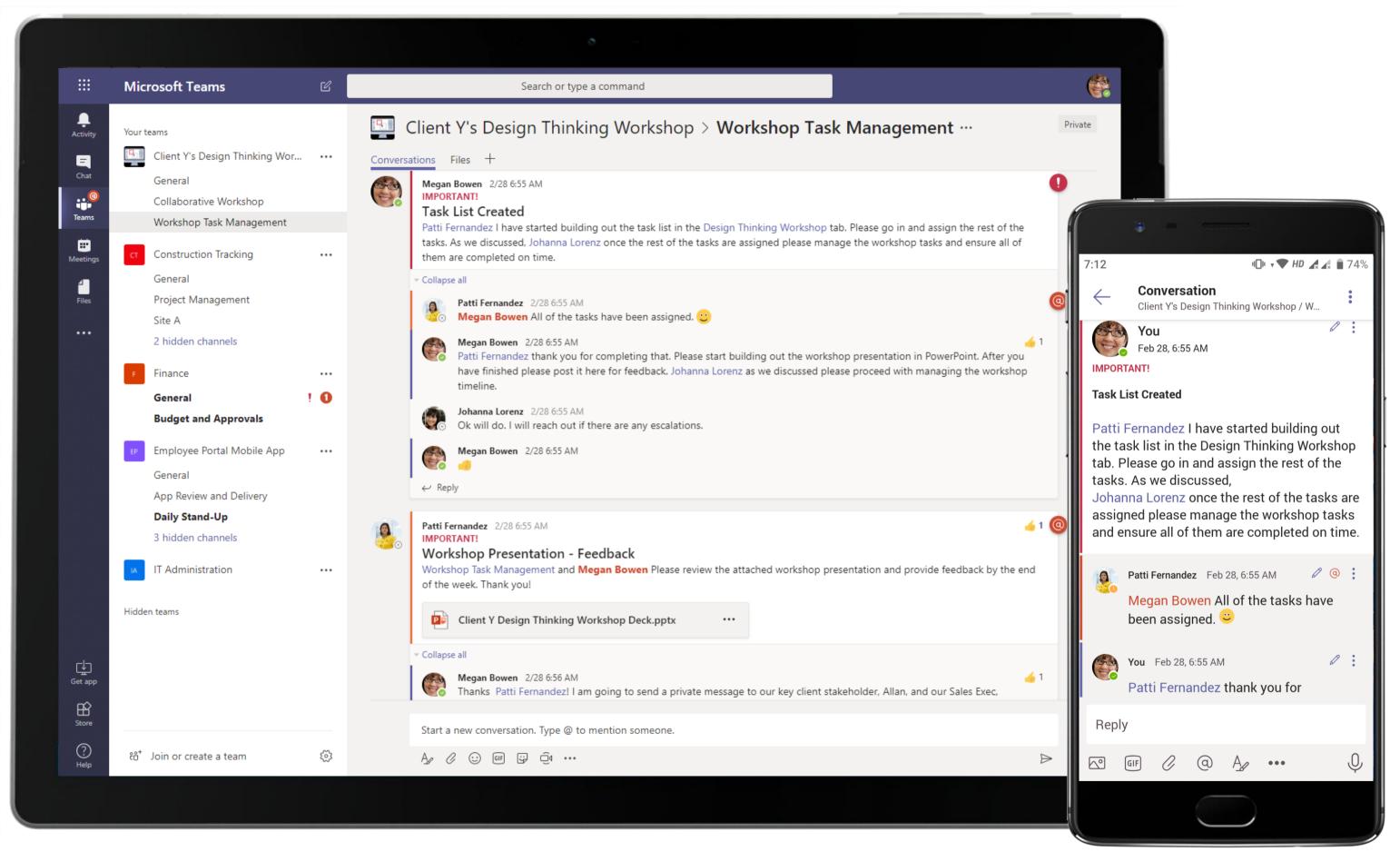
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• Effectively explained why design thinking is important and how it can help.

• Utilized freehand by InVision to create a brainstorming exercise.

• Identified areas that are holding back innovation.

Created an action plan to help



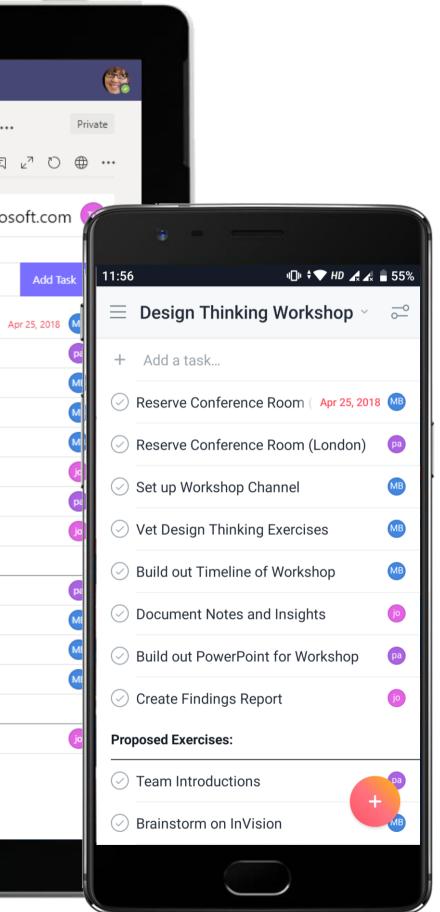
Channel conversations keep team members in sync with each other. Files shared in conversations enable structured, data-driven discussions and decision making such as task lists and workshop presentation in this case.

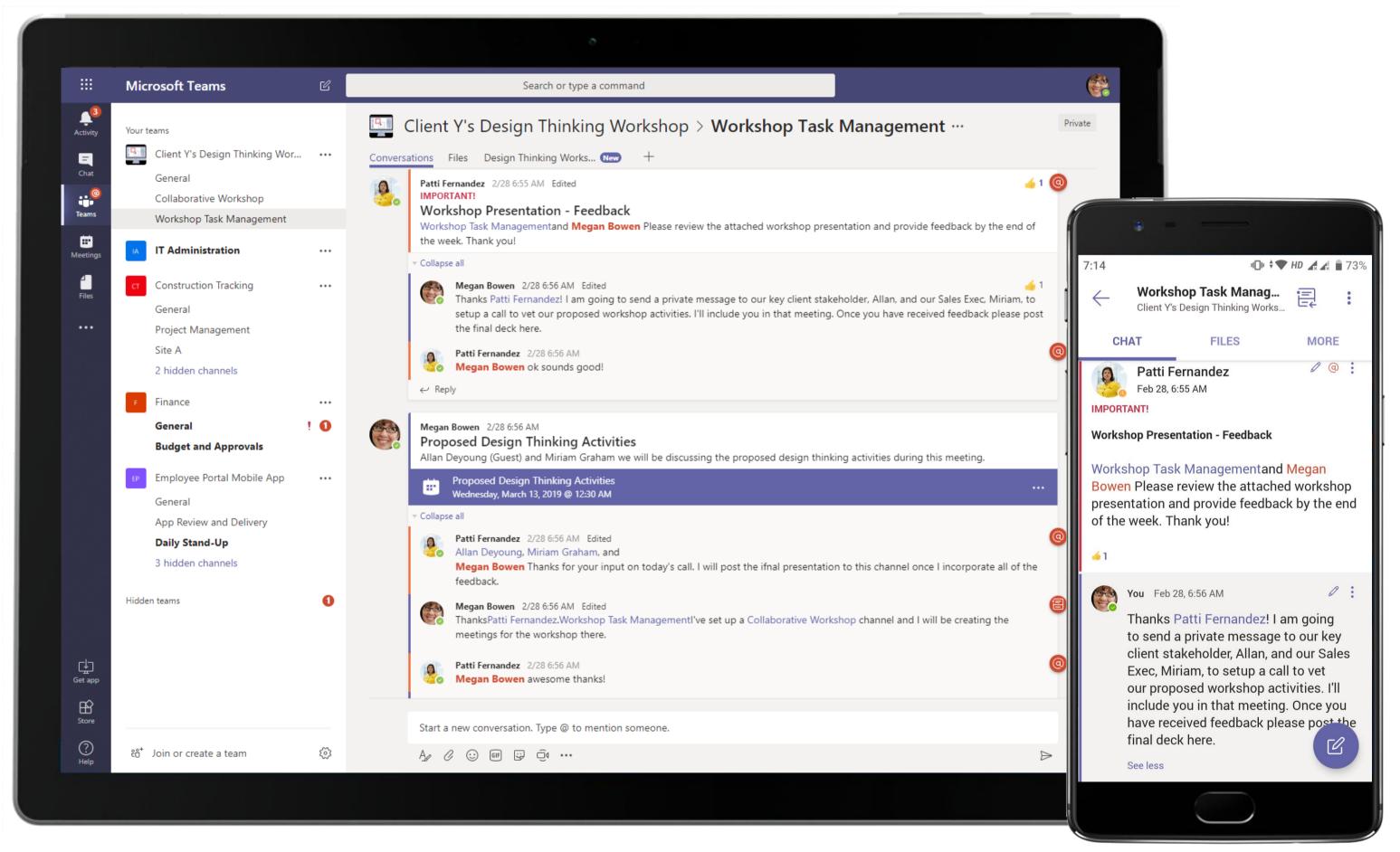


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ngs	Workshop Task Management		Add a new task	
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	2 hidden channels		Vet Design Thinking Exercises Build out Timeline of Workshop	
	General	10	Ocument Notes and Insights	
	Budget and Approvals		Build out PowerPoint for Workshop	
	EP Employee Portal Mobile App		Create Findings Report	
	General		Proposed Exercises:	
	App Review and Delivery Daily Stand-Up		Team Introductions	
	3 hidden channels		Brainstorm on InVision	
			Creative Matrix	
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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.

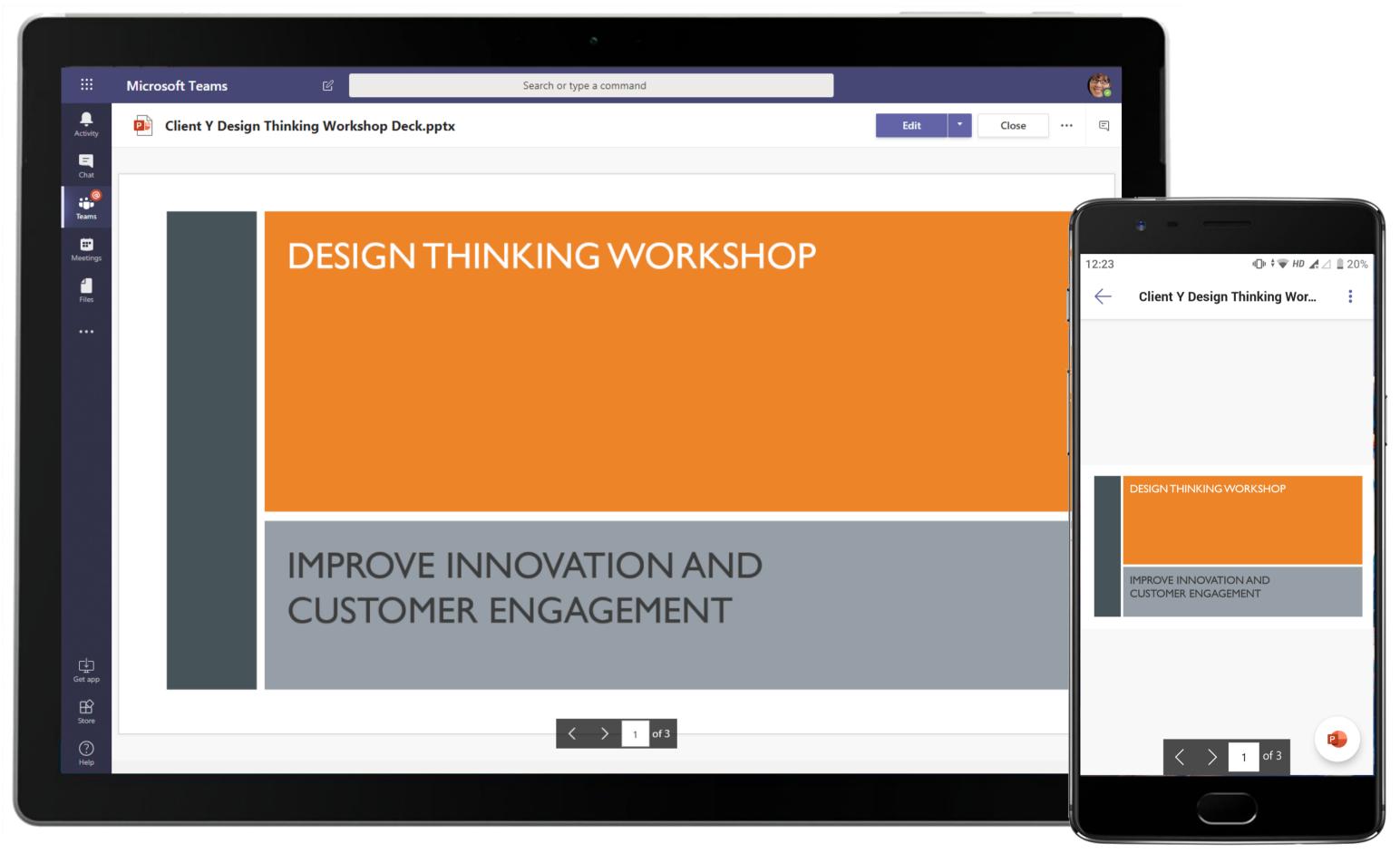






Microsoft Teams conversations are threaded so users can reply directly in-context to specific conversations, while keeping relevant discussions and meeting threads grouped together. Files can be attached or referenced in these conversations as well.

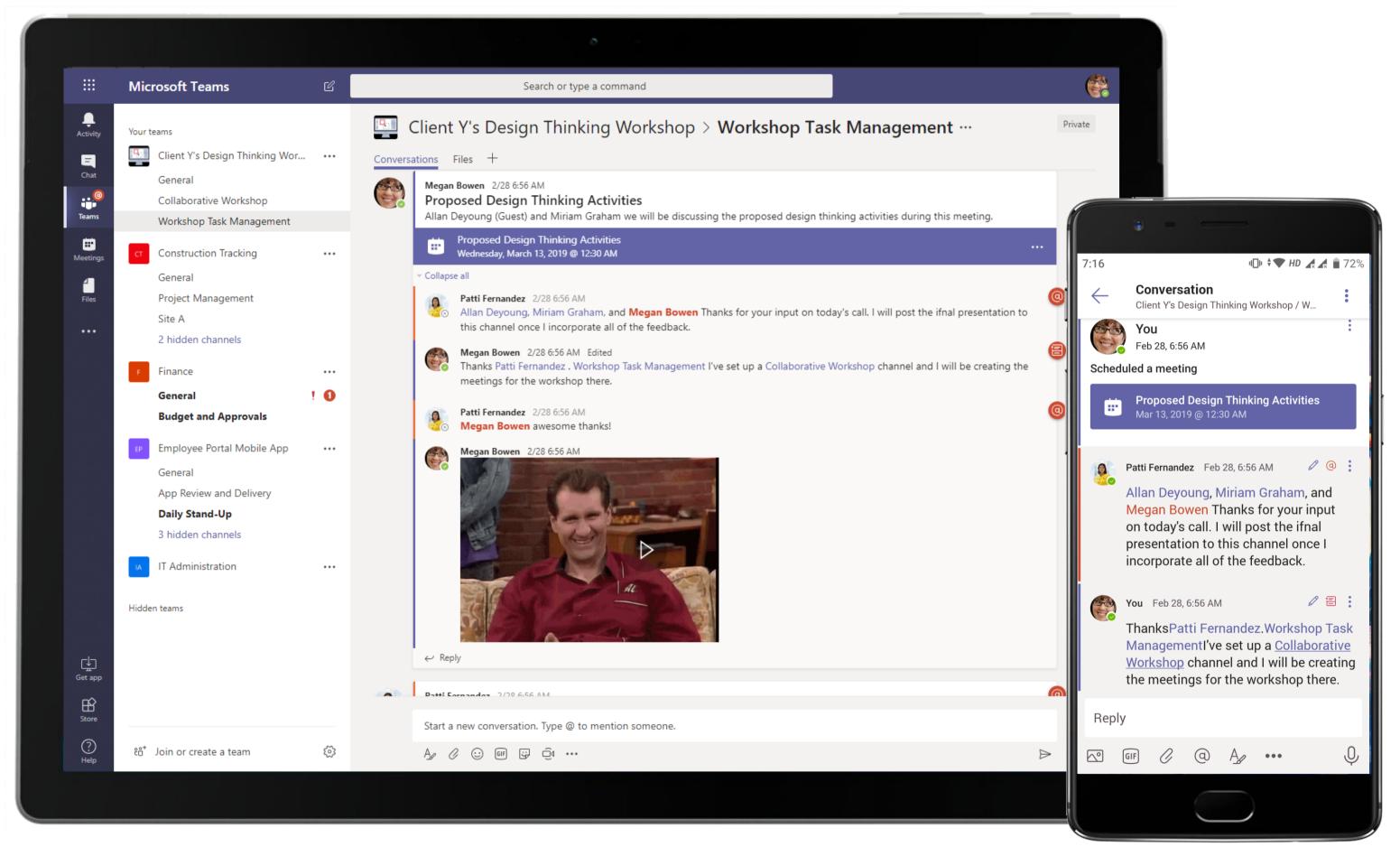




Present ideas and training material to team members with PowerPoint. Team members can also edit this presentation shared by the Project Lead and customize it on the go.



Business Development & Client Relationship - Hosting a Design Thinking Workshop for a Client



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.

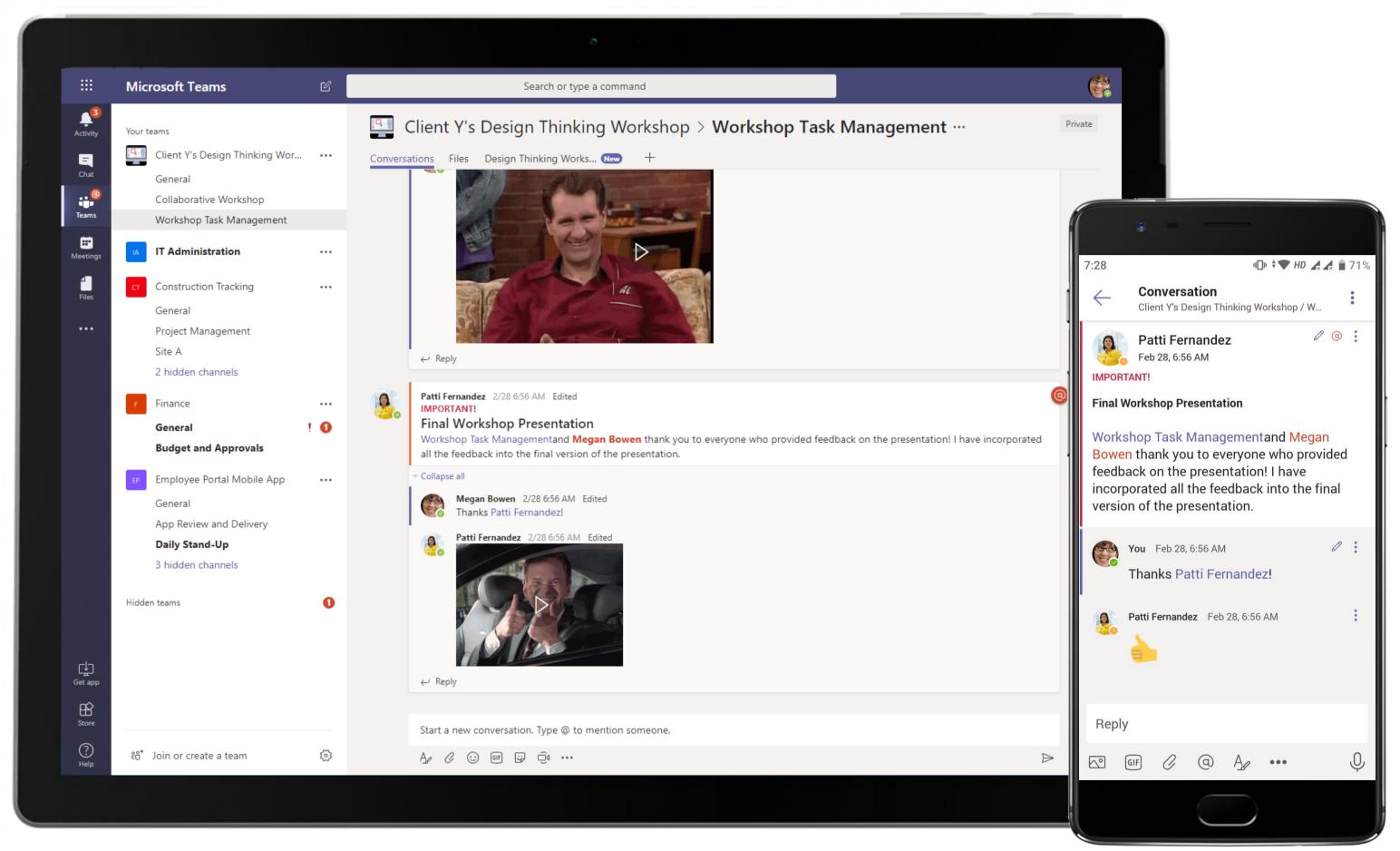
How did Teams help the Delivery Manager execute her roles and responsibilities?

- 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 ٠ meetings with your team.
- Analyze data and create visual summaries with Excel in Microsoft Teams.
- Create and share presentations that stand out with PowerPoint. •



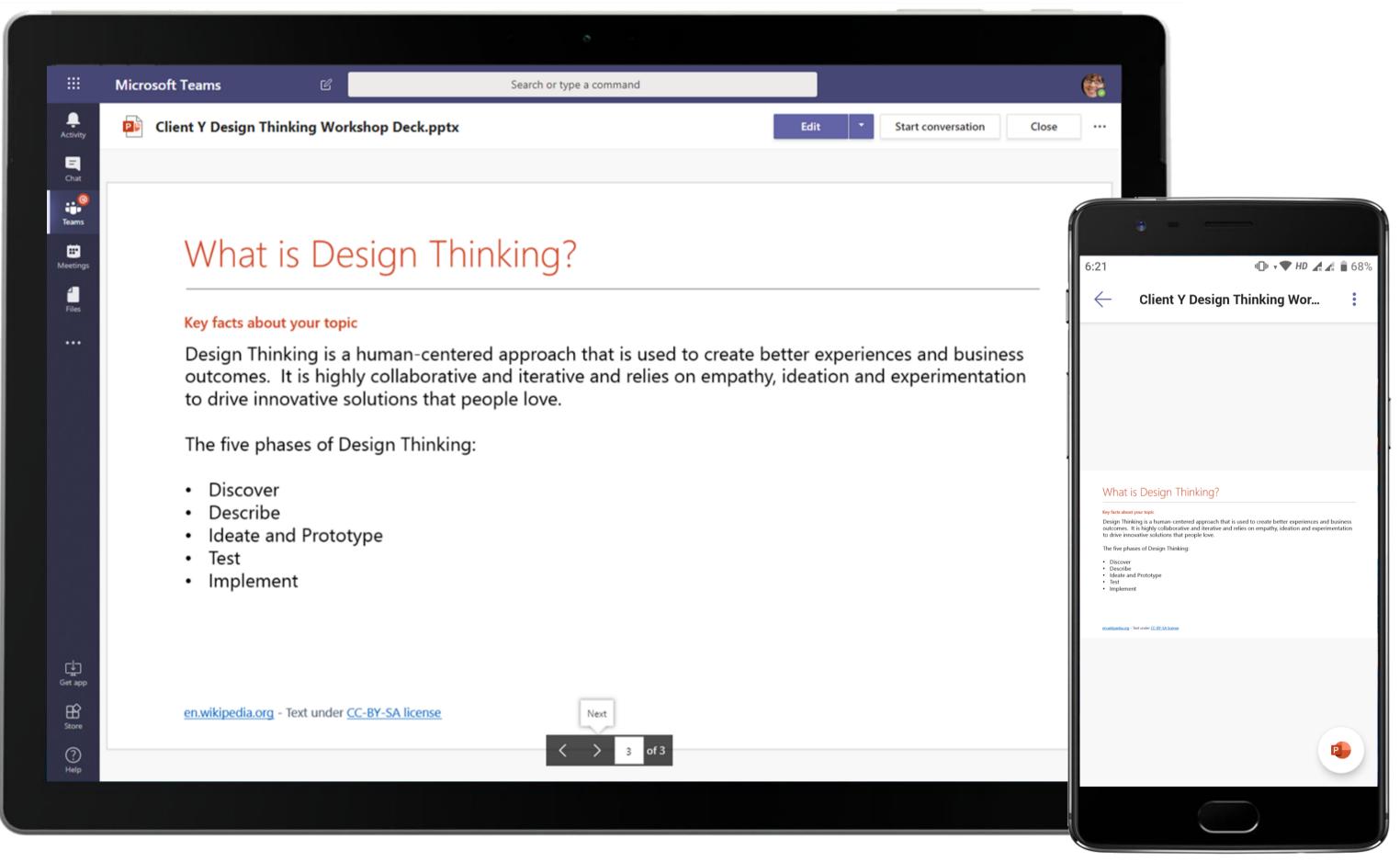
Which app integrations on Teams made it possible?





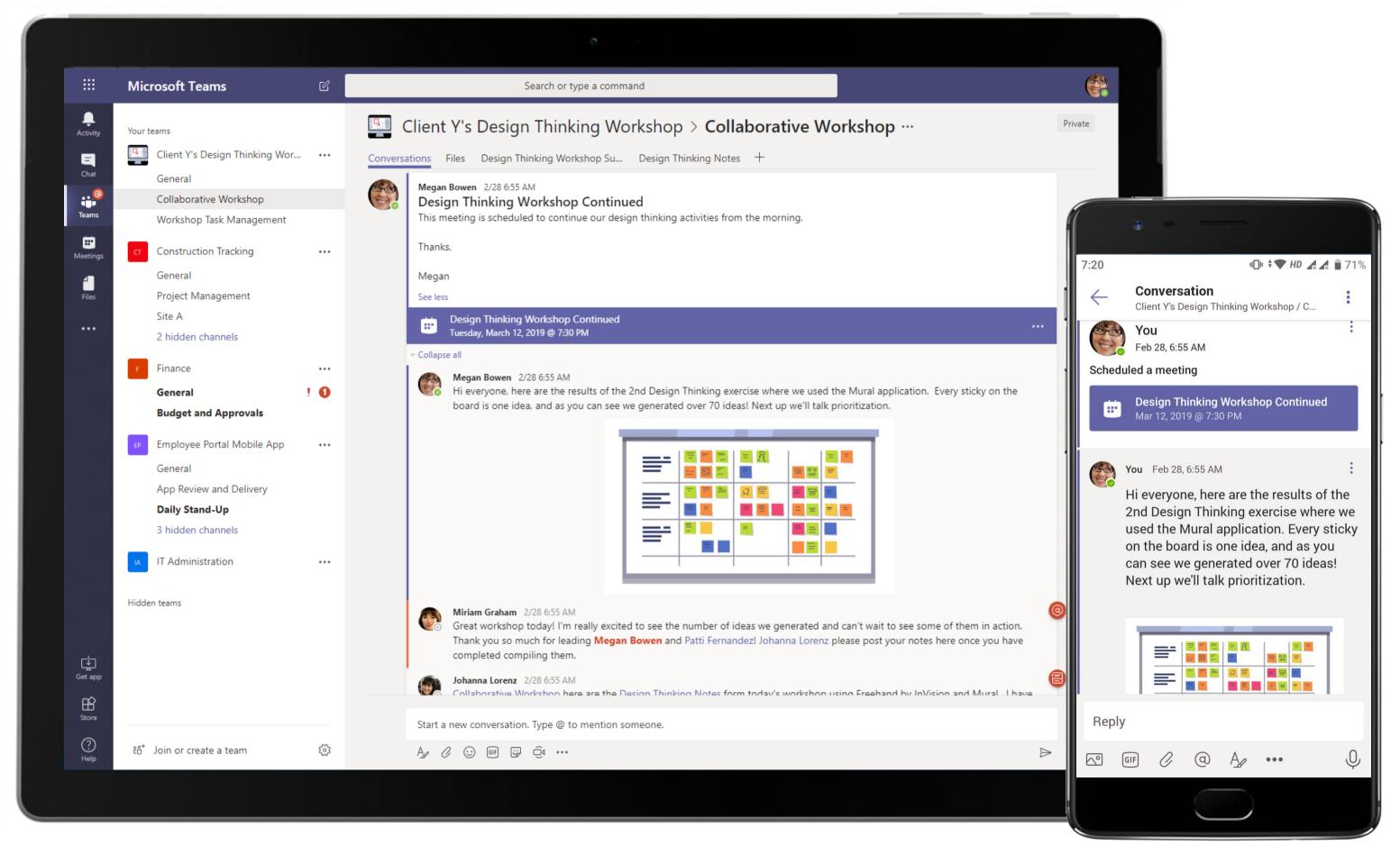
Relying on channel conversations to work with each other, team members quickly rally together to build the workshop presentation.





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.





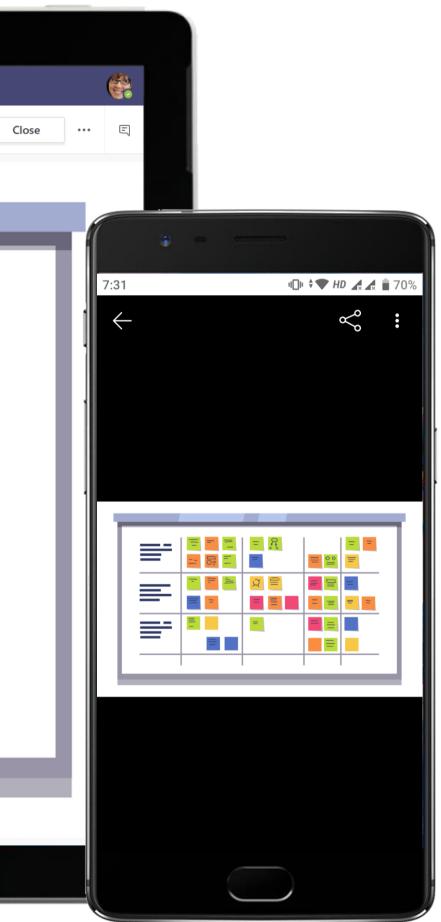
Microsoft Teams seamlessly blends 3rd-party apps within its interface. The Delivery Manager shares a design thinking exercise board built using MURAL in the meeting thread.



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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.

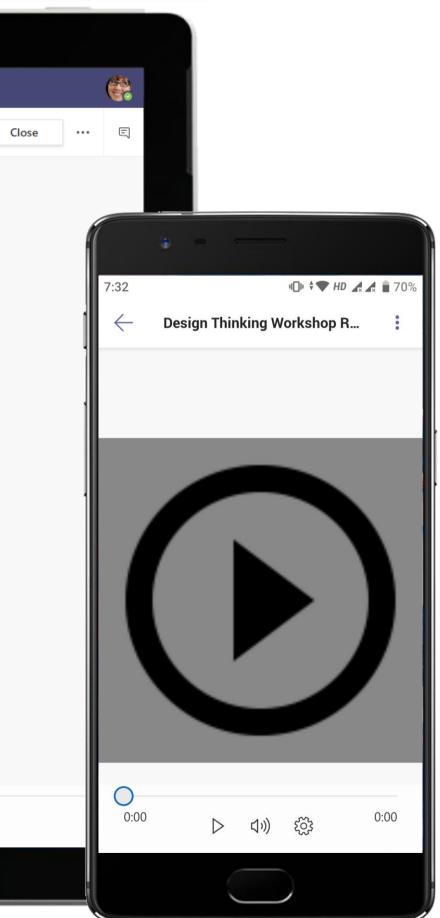




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House important files in a protected cloud repository with Files. A Senior Consultant shares an audio recording of the workshop, documenting it the Files tab for future reference.

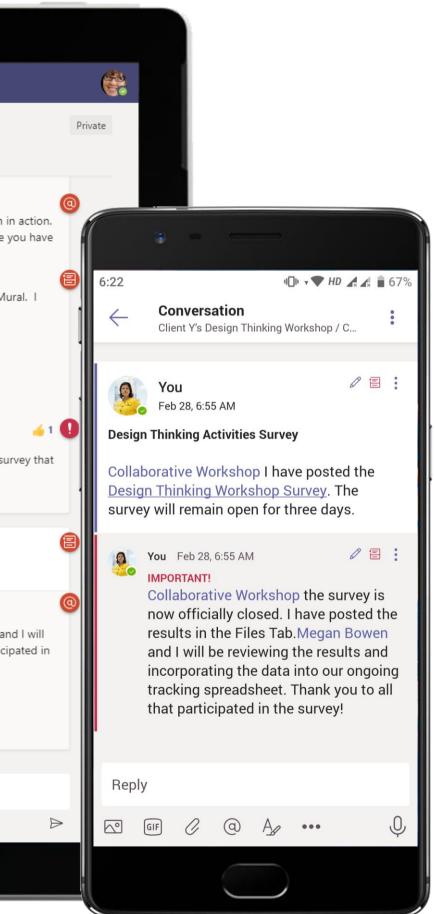




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→ Get app Store	 Employee Portal Mobile App General App Review and Delivery Daily Stand-Up 3 hidden channels IT Administration Hidden teams 		 ✓ Reply Patti Fernandez 2/28 6:55 AM Design Thinking Activities Survey Collaborative Workshop I have posted the Design Thinking Workshop Survey. The survey will remain open for three days. Morranti Morranti Collaborative Workshop the survey is now officially closed. I have posted the results in the Files Tab. Megan Bowen at be reviewing the results and incorporating the data into our ongoing tracking spreadsheet. Thank you to all that partic the survey! ✓ Reply Start a new conversation. Type @ to mention someone.
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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.

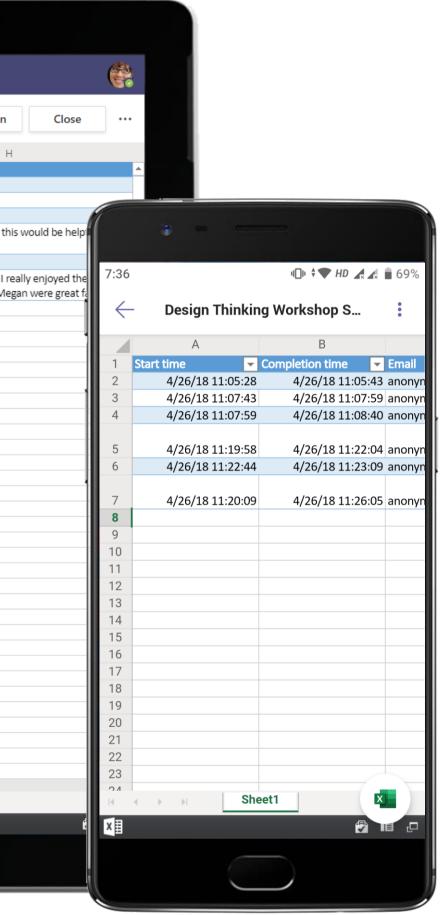




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A post event feedback is collated using Excel and shared with the Delivery Manager for her review to close out and complete the workshop coordination.







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.

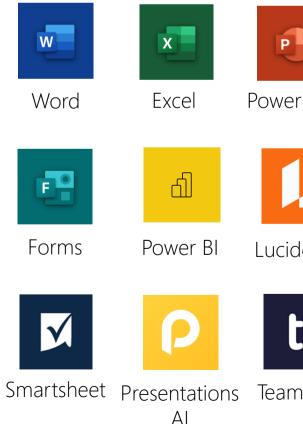
Project Management and Delivery Superpowers in Teams

Capabilities and features used...

Schedule meetings using synced calendars or a meet now • feature

- Participate in instant, open-channel communication ٠
- 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 ٠
- Help securely collaborate with teammates on multiple projects from within a single environment

Apps that enable an immersive experience in Teams





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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. ۲
- Powerful document creation and sharing with integrated apps like Word and PDF. •
- Present your information and data in a dynamic visual manner with PowerPoint. ٠

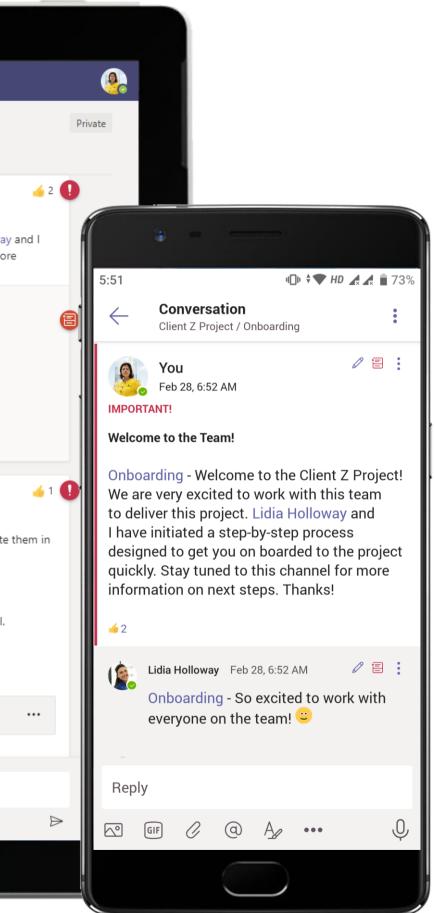


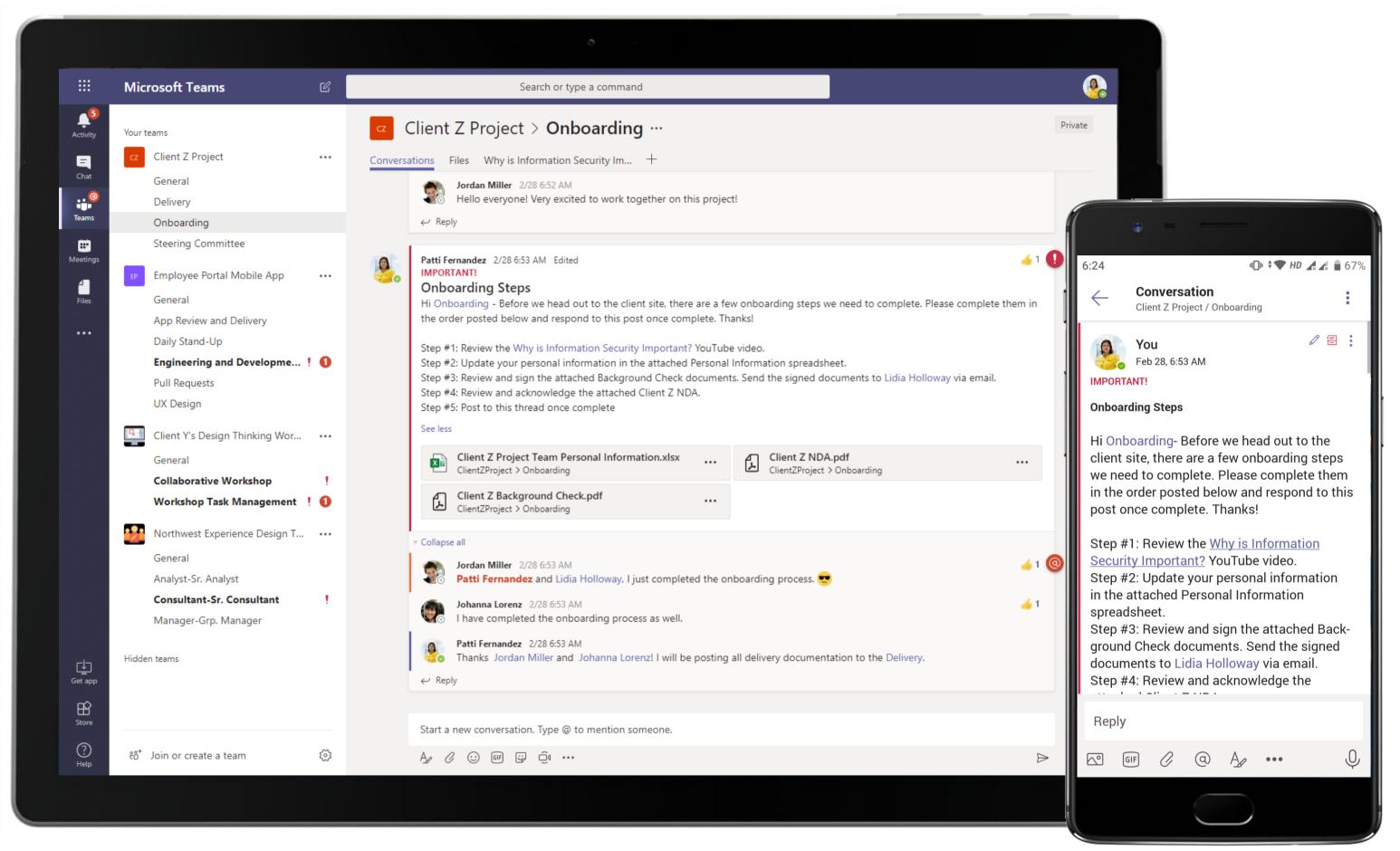


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Chat	General Delivery		Patti Fernandez 2/28 6:52 AM IMPORTANT!
Teams	Onboarding		Welcome to the Team!
	Steering Committee		Onboarding - Welcome to the Client Z Project! We are very excited to work with this team to deliver this project. Lidia Hollow have initiated a step-by-step process designed to get you on boarded to the project quickly. Stay tuned to this channel for m
Meetings	EP Employee Portal Mobile App		v Collapse all v
Files	General		Lidia Holloway 2/28 6:52 AM
	App Review and Delivery		Onboarding - So excited to work with everyone on the team!
	Daily Stand-Up		Johanna Lorenz 2/28 6:52 AM
	Engineering and Developme.	! 🛈	Jordan Miller 2/28 6:52 AM
	UX Design		Hello everyone! Very excited to work together on this project!
	Client Y's Design Thinking Wor.		← Reply
	Client Y's Design Thinking Wor.		Patti Fernandez 2/28 6:53 AM Edited
	Collaborative Workshop	1	IMPORTANT! Onboarding Steps
	Workshop Task Management	t ! O	Hi Onboarding - Before we head out to the client site, there are a few onboarding steps we need to complete. Please complete
	Northwest Experience Design T	•••	the order posted below and respond to this post once complete. Thanks!
	General		Step #1: Review the Why is Information Security Important? YouTube video. Step #2: Update your personal information in the attached Personal Information spreadsheet.
	Analyst-Sr. Analyst		Step #3: Review and sign the attached Background Check documents. Send the signed documents to Lidia Holloway via ema Step #4: Review and acknowledge the attached Client Z NDA.
	Consultant-Sr. Consultant	1	Step #5: Post to this thread once complete
	Manager-Grp. Manager		See less
¢	Hidden teams		Client Z Project Team Personal Information.xlsx Client Z NDA.pdf ClientZProject > Onboarding ClientZProject > Onboarding
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Help	°ö⁺ Join or create a team	ŝ	

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.







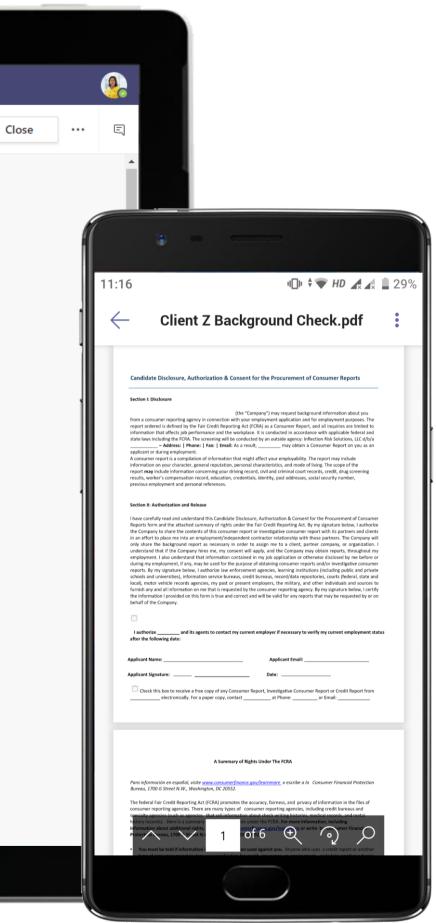
Channels are a great place for discussions, meetings, sharing files and even for onboarding, in this case. The Project Lead shares clear, detailed onboarding steps for the team and eases the process.

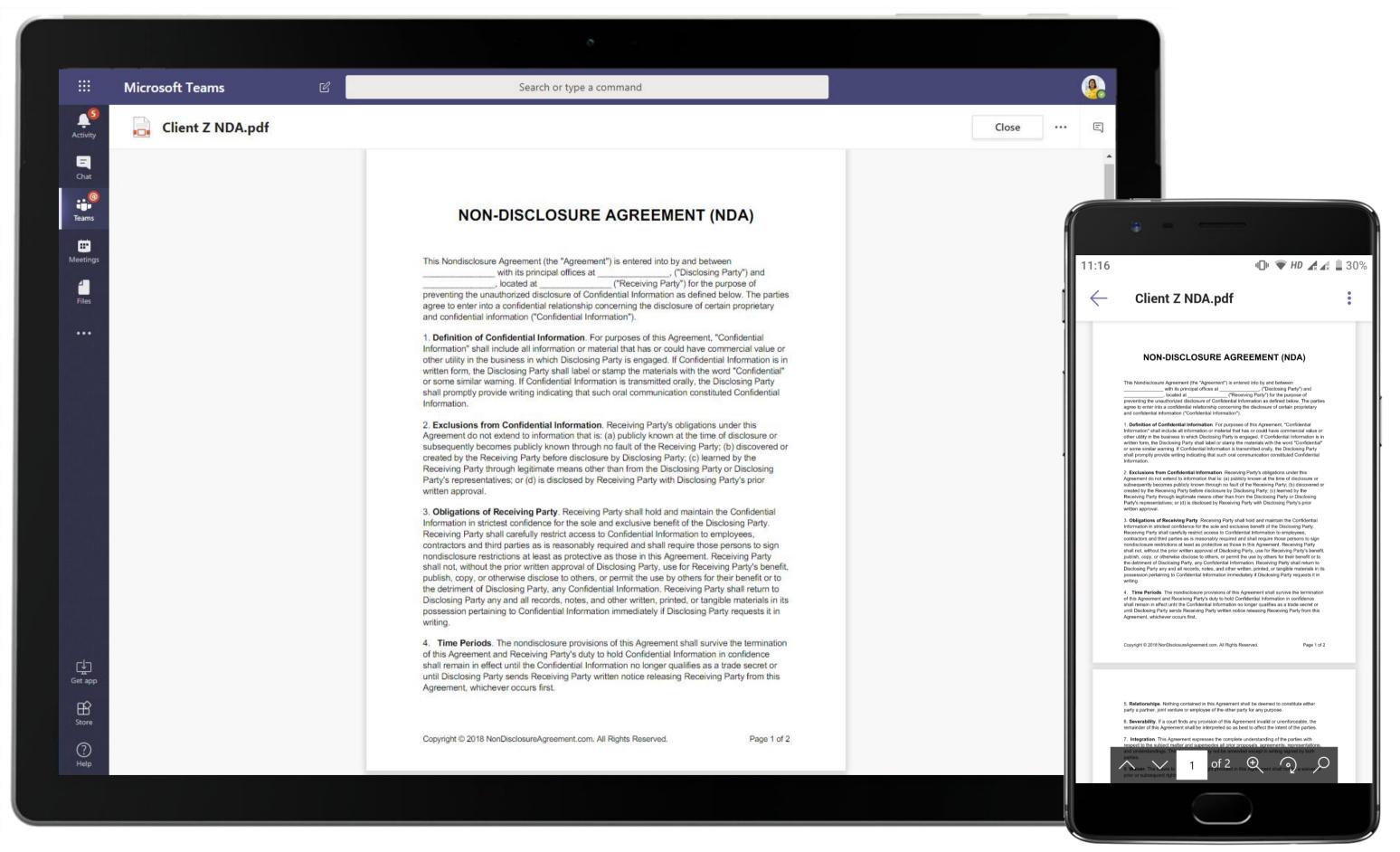


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Teams			Candidate Disclosure, Authorization & Consent for the Procurement of Consumer Reports	
•			Section I: Disclosure	
Meetings J Files			(the "Company") may request background information about you from a consumer reporting agency in connection with your employment application and for employment purposes. The report ordered is defined by the Fair Credit Reporting Act (FCRA) as a Consumer Report, and all inquiries are limited to information that affects job performance and the workplace. It is conducted in accordance with applicable federal and state laws including the FCRA. The screening will be conducted by an outside agency: Inflection Risk Solutions, LLC d/b/a	
			— Address: Phone: Fax: Email: As a result, may obtain a Consumer Report on you as an applicant or during employment. A consumer report is a compilation of information that might affect your employability. The report may include information your character, general reputation, personal characteristics, and mode of living. The scope of the report may include information concerning your driving record, civil and criminal court records, credit, drug screening results, worker's compensation record, education, credentials, identity, past addresses, social security number, previous employment and personal references.	
			Section II: Authorization and Release	
			I have carefully read and understand this Candidate Disclosure, Authorization & Consent for the Procurement of Consumer Reports form and the attached summary of rights under the Fair Credit Reporting Act. By my signature below, I authorize the Company to share the contents of this consumer report or investigative consumer report with its partners and clients in an effort to place me into an employment/independent contractor relationship with those partners. The Company will only share the background report as necessary in order to assign me to a client, partner company, or organization. I understand that if the Company hires me, my consent will apply, and the Company may obtain reports, throughout my employment. I also understand that information contained in my job application or otherwise disclosed by me before or during my employment, if any, may be used for the purpose of obtaining consumer reports and/or investigative consumer reports. By my signature below, I authorize law enforcement agencies, learning institutions (including public and private schools and universities), information service bureaus, credit bureaus, record/data repositories, courts (federal, state and local), motor vehicle records agencies, my past or present employers, the military, and other individuals and sources to furnish any and all information on me that is requested by the consumer reporting agency. By my signature below, I certify the information I provided on this form is true and correct and will be valid for any reports that may be requested by or on behalf of the Company.	
			I authorize and its agents to contact my current employer if necessary to verify my current employment status	
			after the following date:	
Get app			Applicant Name: Applicant Email: Applicant Signature: Date:	
Store			Check this box to receive a free copy of any Consumer Report, Investigative Consumer Report or Credit Report from electronically. For a paper copy, contact at Phone: or Email:	
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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.

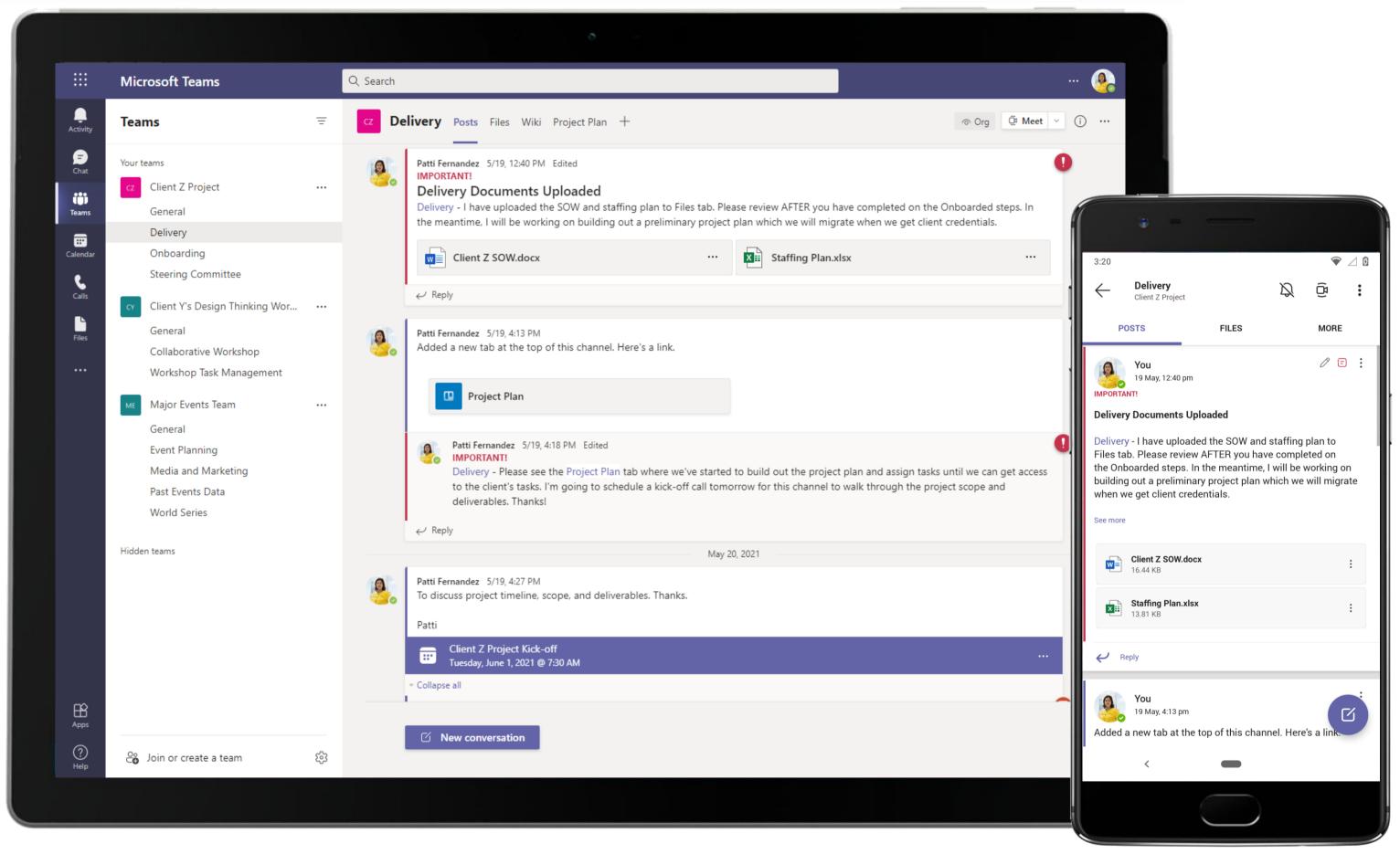






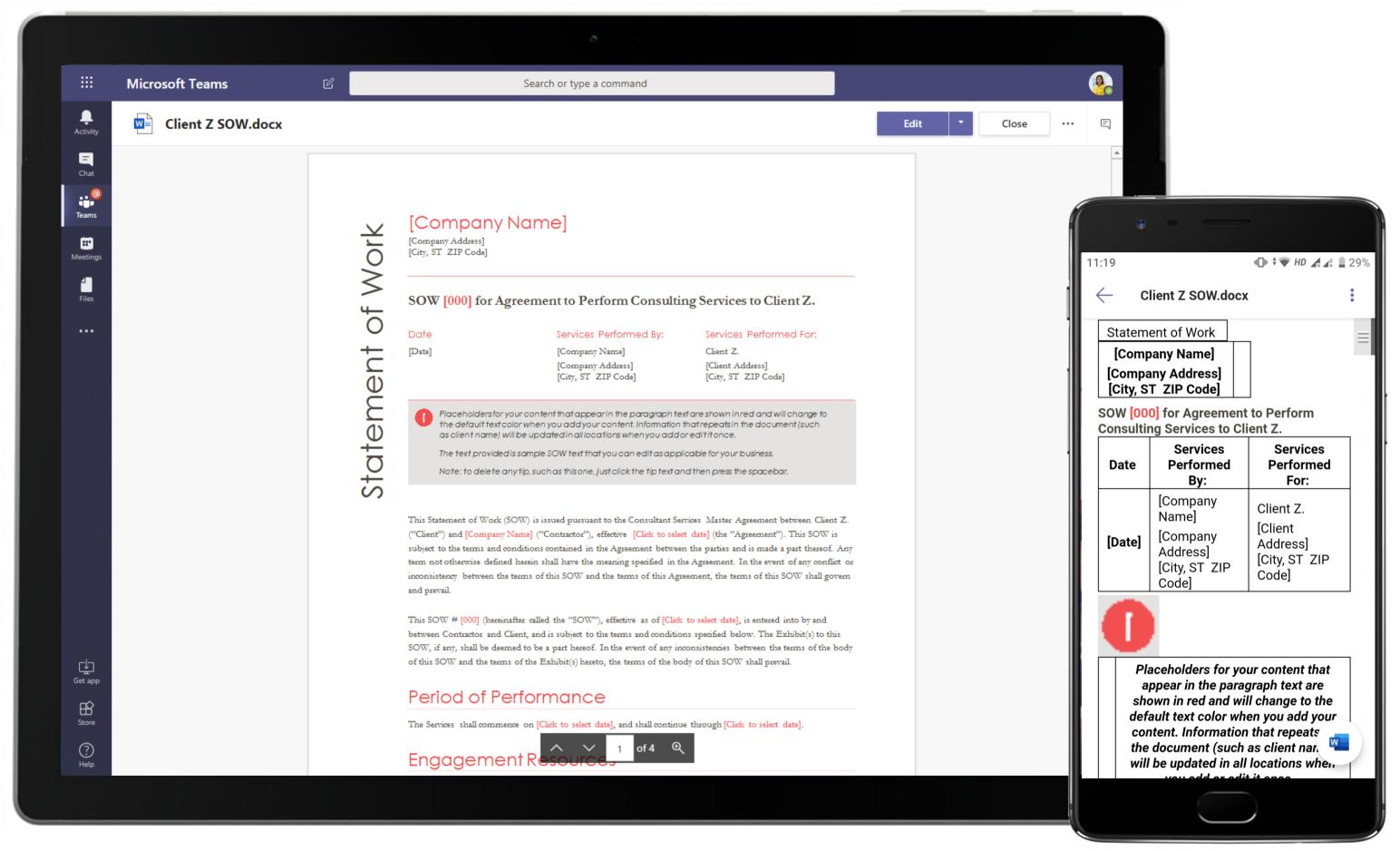
Onboarding includes signing non-disclosure agreements. This process is, once again, eased by the protected file sharing capabilities of Microsoft Teams, where team members can quickly access the forms needed from the Files tab.





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!





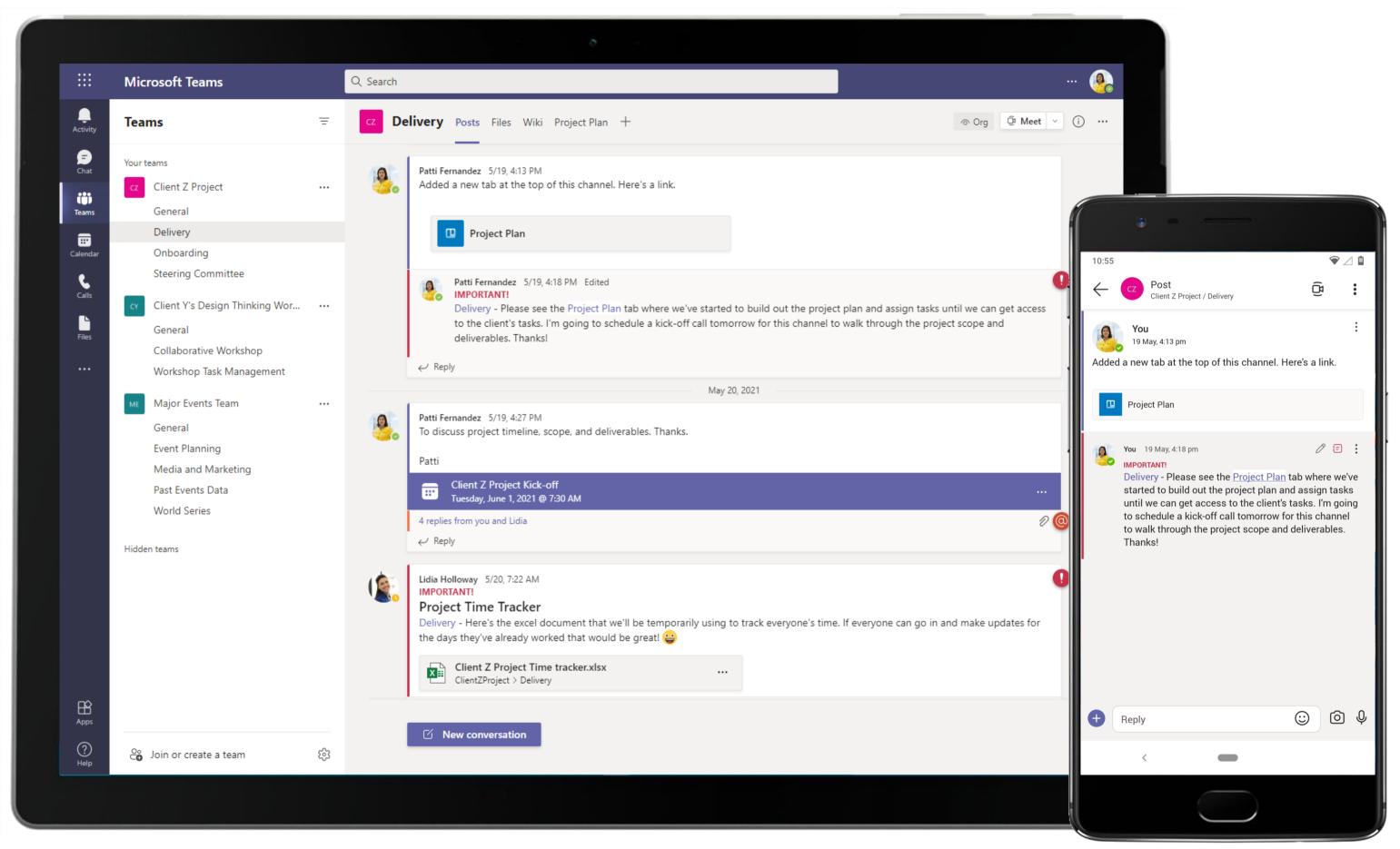
Easy access to documents and templates within relevant channels using Word app integrated into Teams allows the Project Lead to share the SOW with team members working on the project.



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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.





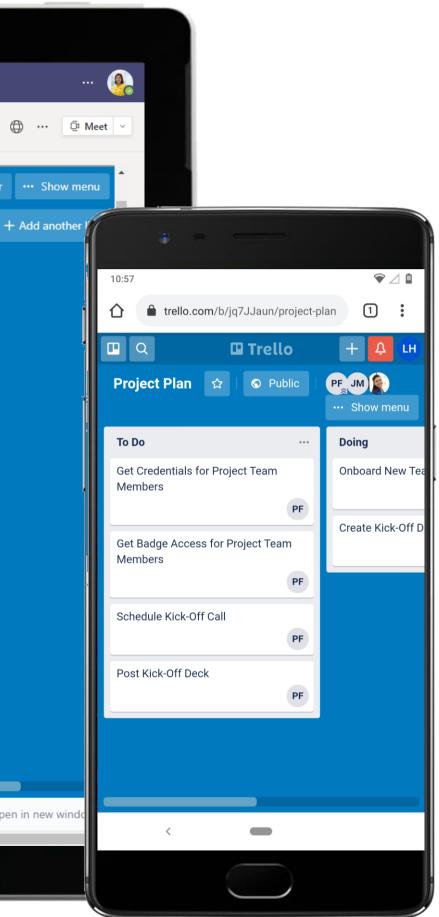
The Project Lead uses channel communication to keep her team apprised of the progress of the project. Channel conversations are a great way to keep your core team engaged for planning and disseminating information.

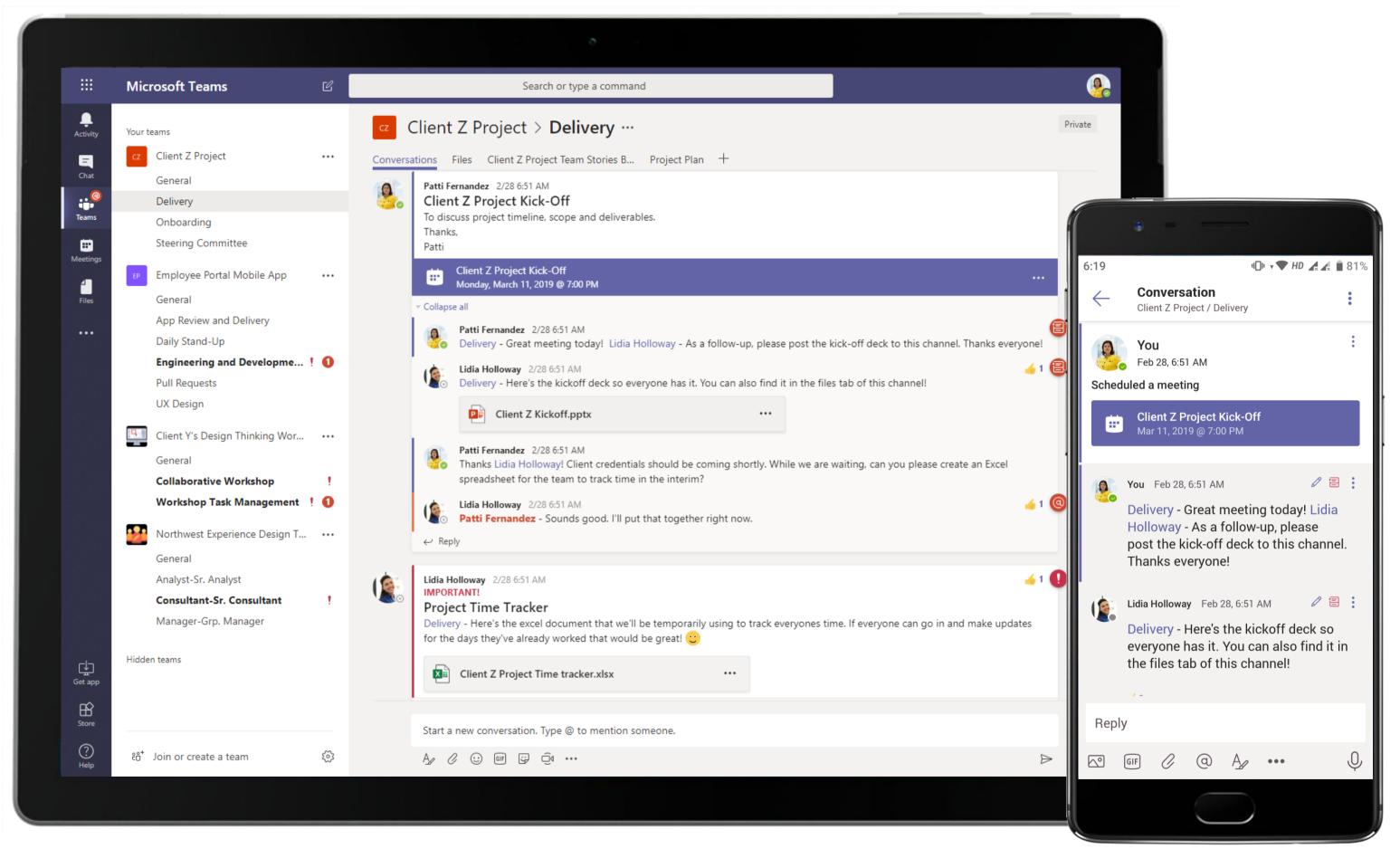


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Organize tasks by adding one or more Trello tabs to a channel in Teams. This allows the Project Lead to keep track of the tasks assigned to each team member and follow-up on the progress for each task with ease through Teams.







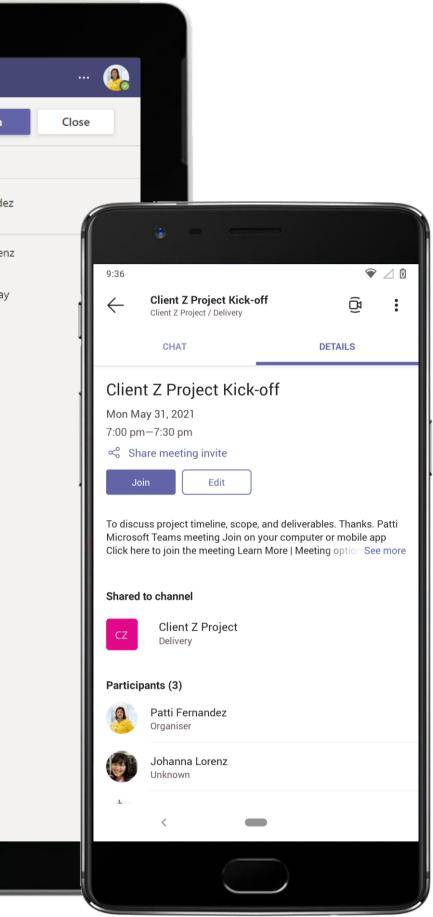
Share your work and updates on action items from virtually anywhere using audio and video calling capabilities inside Teams. Communicate in open-channel conversations and keep team members up-to-date.

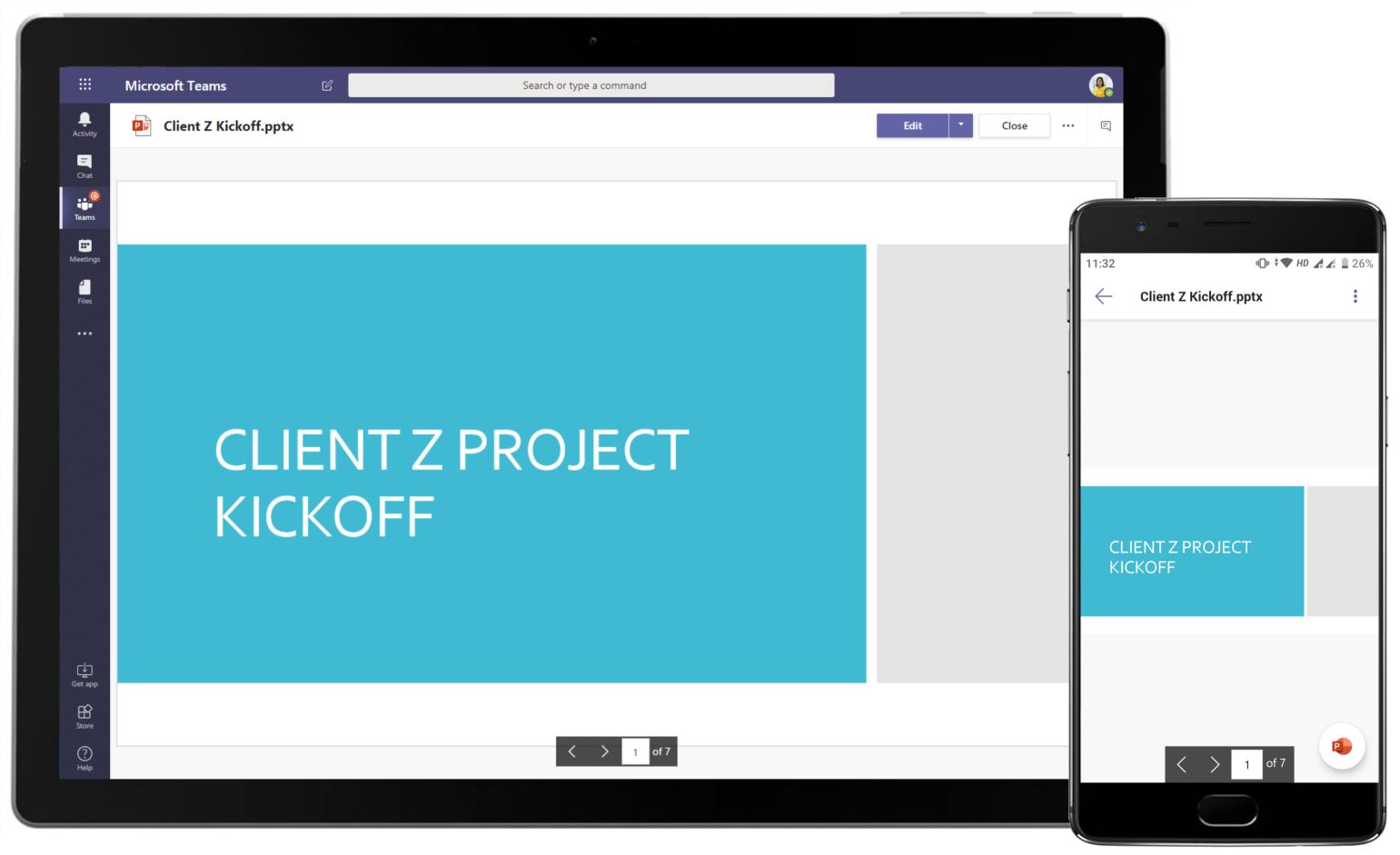


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Apps ? Help			

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. •

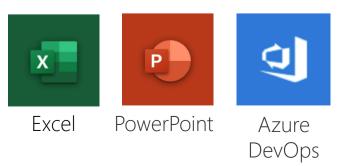
How did Teams help the Project and Delivery Lead execute her roles and responsibilities?

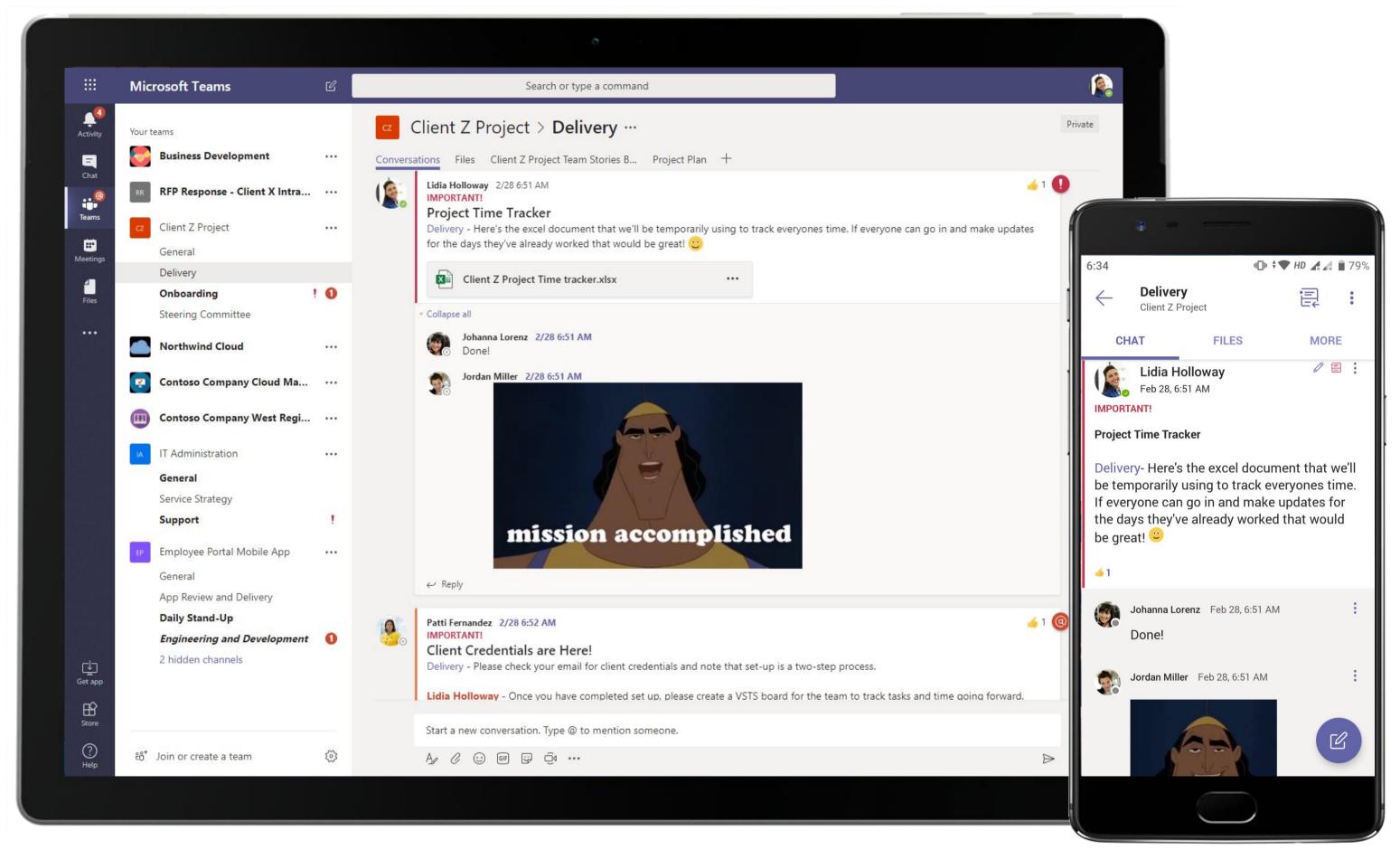
- Trello in Teams help keep the task list visible while acting as a checklist for operations.
- Integrated Office 365 applications like Excel and PowerPoint help efficient ٠ collaboration.
- Search, find work and collaborate better with your team with Azure DevOps.





Which app integrations on Teams made it possible?





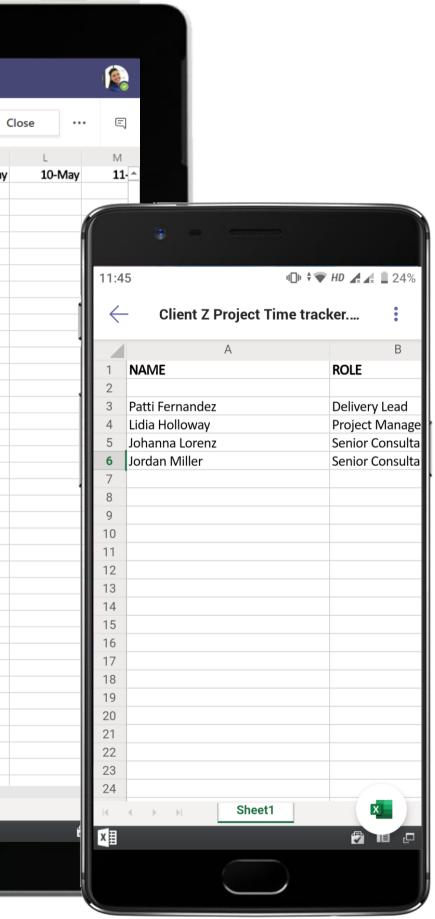
Microsoft Teams conversations are threaded so users can reply directly in-context to specific conversations, keeping relevant chats grouped together. @mention relevant team members to make sure you grab their attention.



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@	2 3	Patti Fernandez	Delivery Lead	8.5	9	6						
Teams	4	Lidia Holloway	Project Manager	8	8	8						
icality	5	Johanna Lorenz	Senior Consultant	8	8	8						
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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.

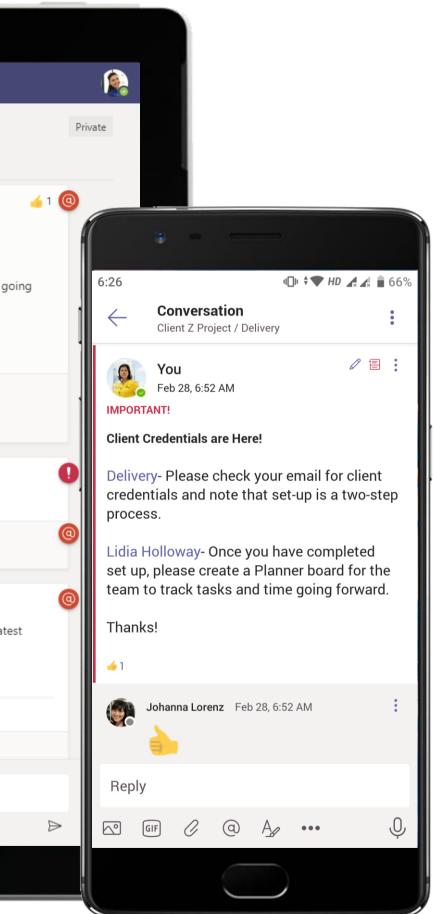




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eeeeeeeeeeeeeeeeeeeeeeeeeeeeeeeeeeeeee	RFP Response - Client X Intrane ··· General Formal Response Materials ! 1	Patti Fernandez 2/28 6:52 AM Edited IMPORTANT! Client Credentials are Here! Delivery- Please check your email for client credentials and note that set-up is a two-step process.
Meetings Files	Opportunity Oral Stage	Lidia Holloway- Once you have completed set up, please create a Planner board for the team to track tasks and time forward.
	cz Client Z Project •••• General	Thanks! See less
	Delivery 3 Onboarding ! 1 Steering Committee	Johanna Lorenz 2/28 6:52 AM ✓ Reply
	Northwind Cloud	Johanna Lorenz 2/28 6:52 AM IMPORTANT! Tab conversation has begun.
	Contoso Company Cloud ··· ()	4 replies from you, Johanna, and Jordan ← Reply
	IT Administration General Service Strategy Support !	Johanna Lorenz 2/28 6:52 AM Edited IMPORTANT! Lidia Holloway and Patti Fernandez- Planner and Client Z Project Team Stories Backlog have been updated with the la estimates. The VSTS Burndown chart is ready for review and compilation into the Steering Committee presentation. Bug Burndown MCT/2007 Bernardog 129 Compiled 62% Average 4 Total Score 14
Get app	Employee Portal Mobile App ····	See more
Store	General App Review and Delivery Daily Stand-Up	2 replies from you and Patti Start a new conversation. Type @ to mention someone.
? Help	ະຕ້ Join or create a team 😥	$A_{\mathscr{C}}$ \mathcal{C} \mathfrak{G} \mathfrak{G} \mathfrak{G} \mathfrak{G}

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.

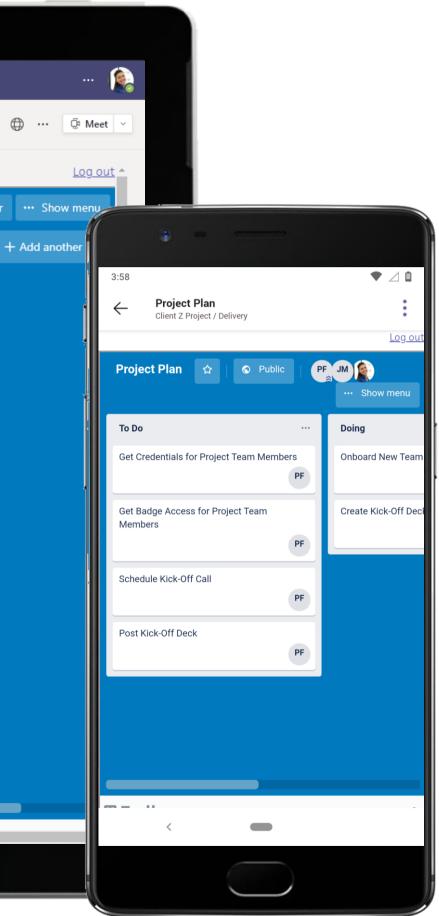


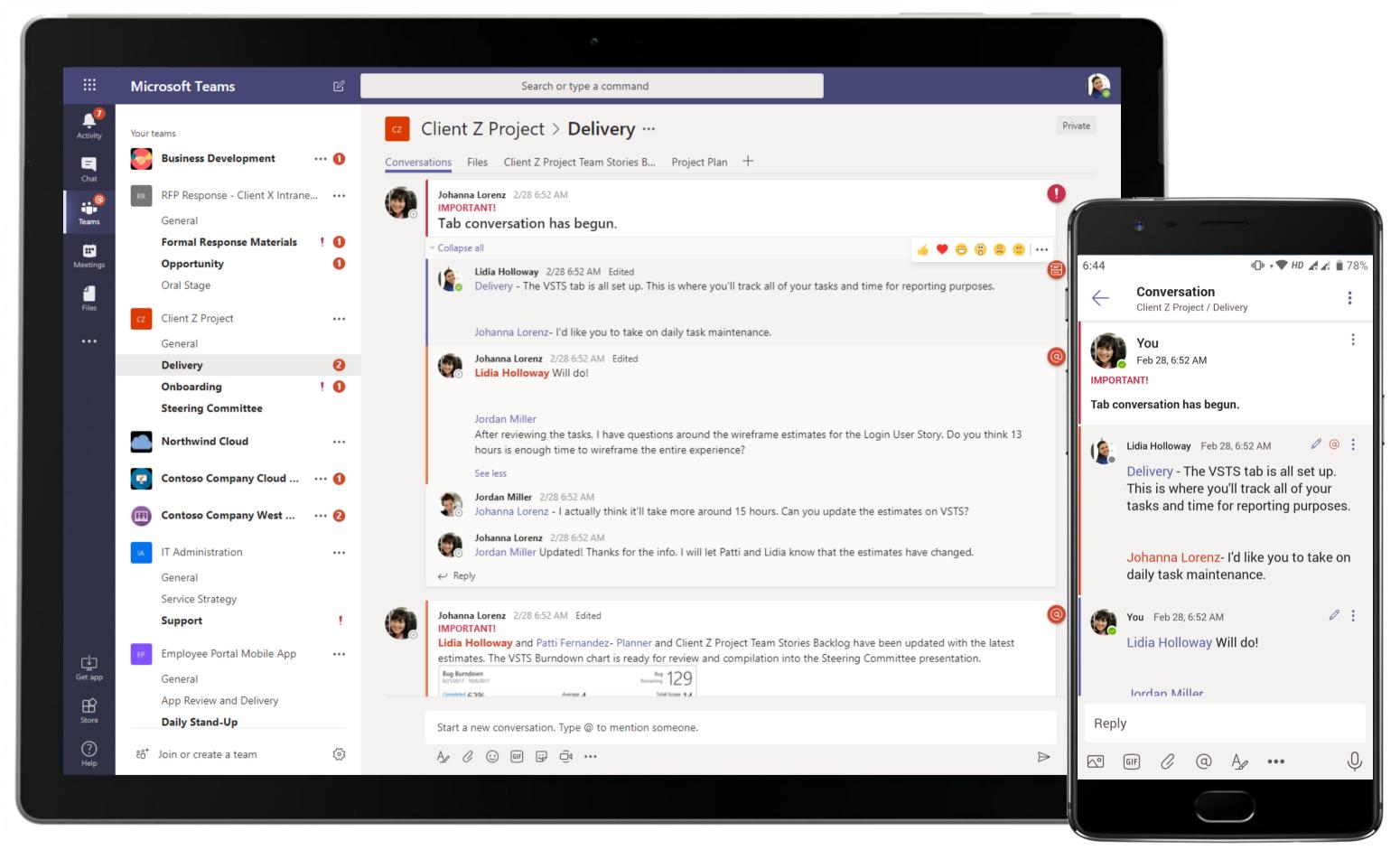


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Trello enables speedy plan mobilization using task assignment and delegation. Organize and track tasks with the Trello tab in Microsoft Teams.







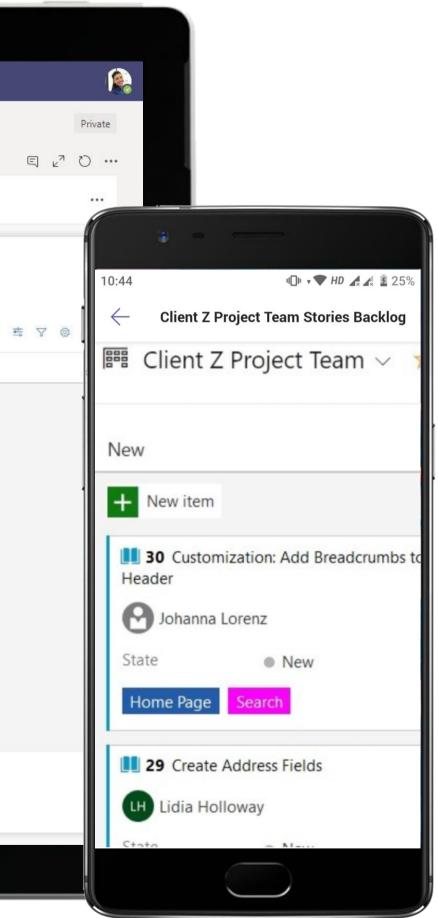
Keep track of your project by adding your favorite Azure DevOps dashboard directly into Microsoft Teams. The Project and Delivery Lead uses a VSTS burndown chart shared by a team member to build a presentation.



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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.

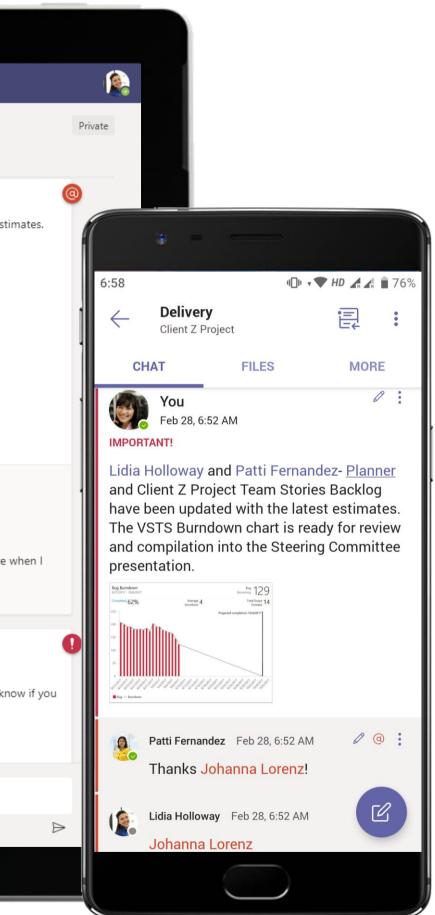




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Client Z Project		The VSTS Burndown chart is ready for review and compilation into the Steering Committee presentation.
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-	! 0	20 Projected completion: 10/4/2017
Steering Committee		
Northwind Cloud		
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Contoso Company West Regi		Rug — Burndown
IT Administration		Collapse all Patti Fernandez 2/28 6:52 AM
General		Thanks Johanna Lorenz!
Service Strategy		Lidia Holloway 2/28 6:52 AM Johanna Lorenz, Thanks so much! I'm working on building out the Steering Committee presentation now. I'll post here
Support		Johanna Lorenz, Thanks so much! I'm working on building out the Steering Committee presentation now. I'll post here finish.
Employee Portal Mobile App	•••	← Reply
General App Review and Delivery		Lidia Holloway 2/28 6:52 AM
Daily Stand-Up		Steering Committee Meeting
Engineering and Development	0	Delivery - Here's the finished powerpoint for the Steering Committee meeting. Patti Fernandez, can you review it and let me
2 hidden channels		have any feedback?
		Steering Committee Deck.pptx ····
		Start a new conversation. Type @ to mention someone.
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eం⁺ Join or create a team	\$\$	

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.

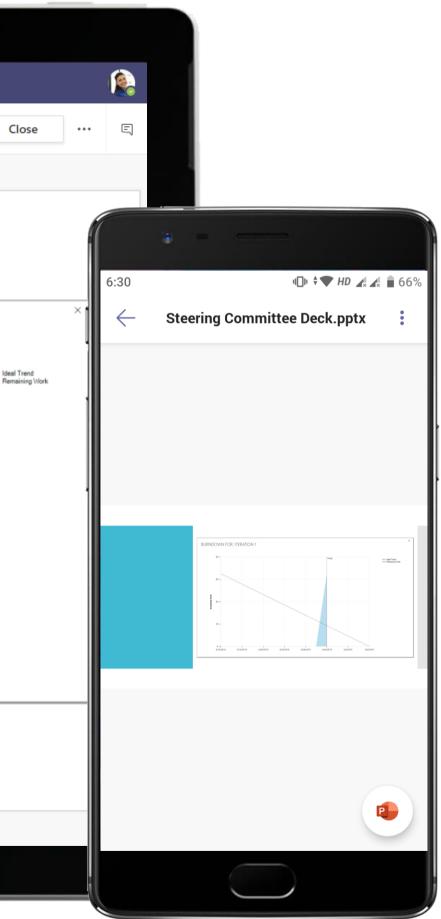


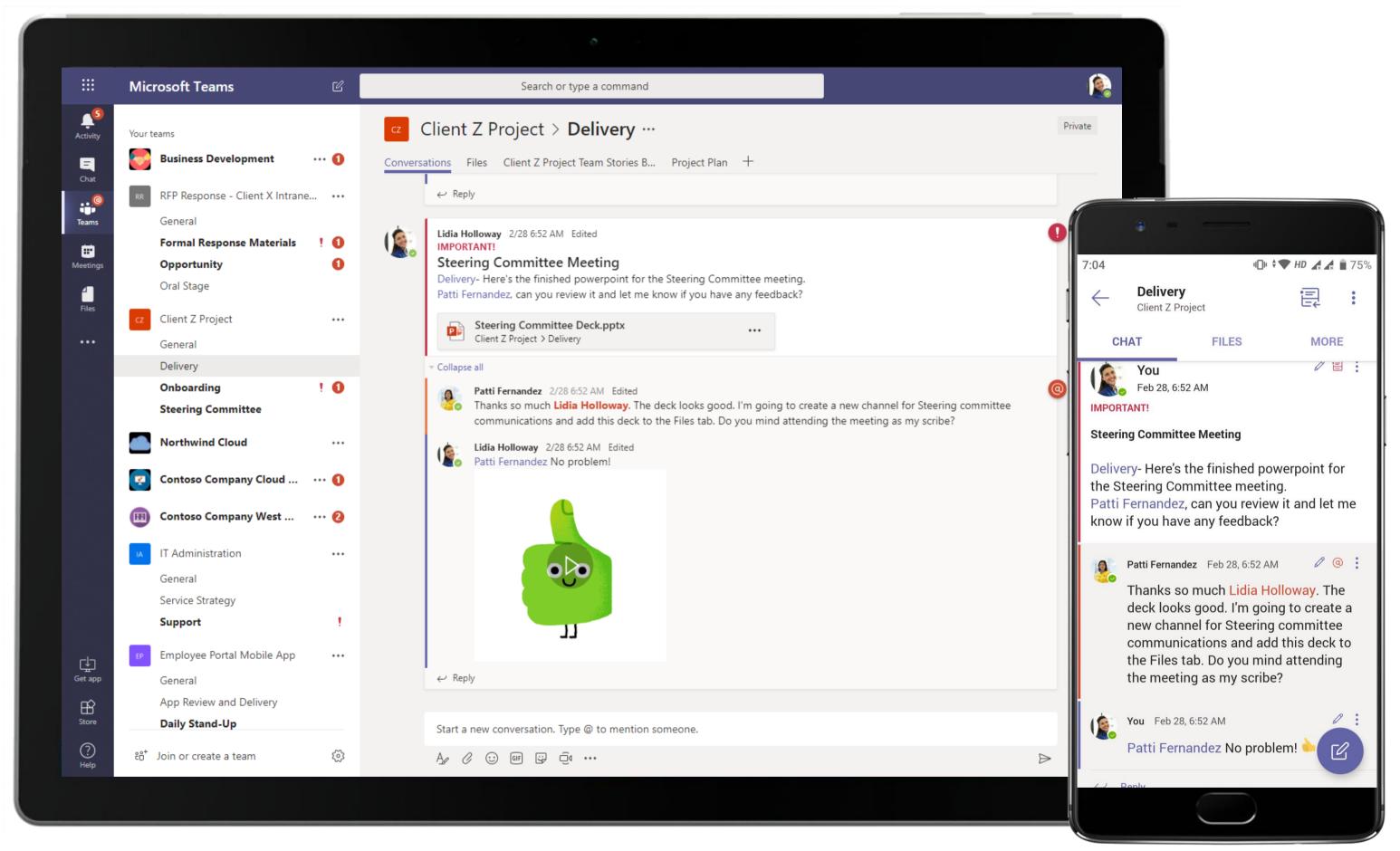


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Store and share important files within a protected, cloud-enabled repository with Files. The PowerPoint deck containing the presentation for the steering committee is housed here for the team's easy access.







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

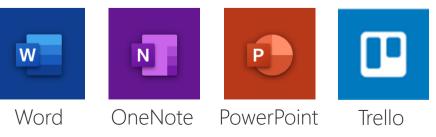
Contoso always has a large staff segment allocated to help with various Northwind projects. As a back-end developer, the Analyst knows she needs to work fast and manage herself effectively. She works on multiple tasks for short periods of time and needs a way to organize all her tasks for every project.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

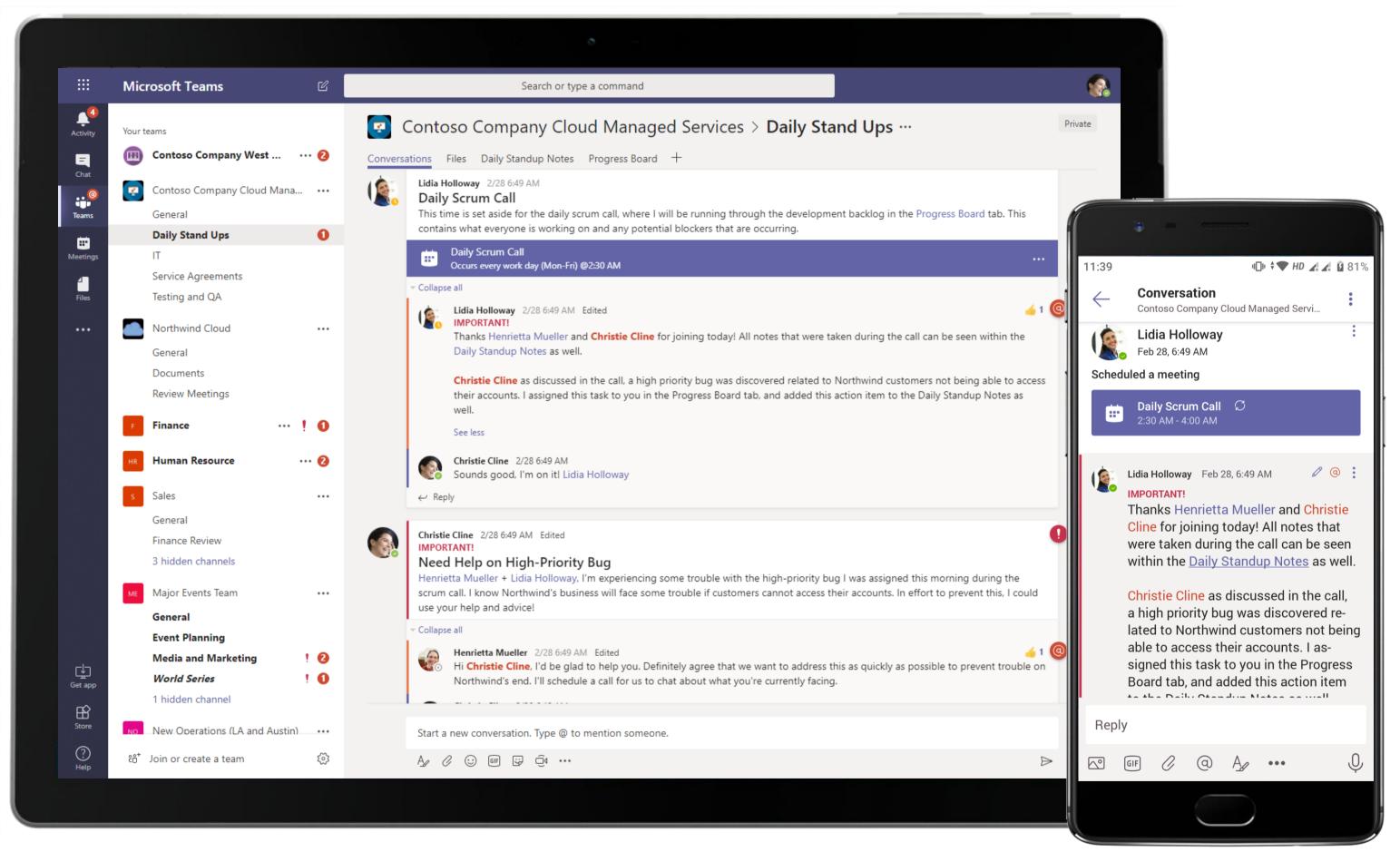
How did Teams help the Analyst execute her roles and responsibilities?

- 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?







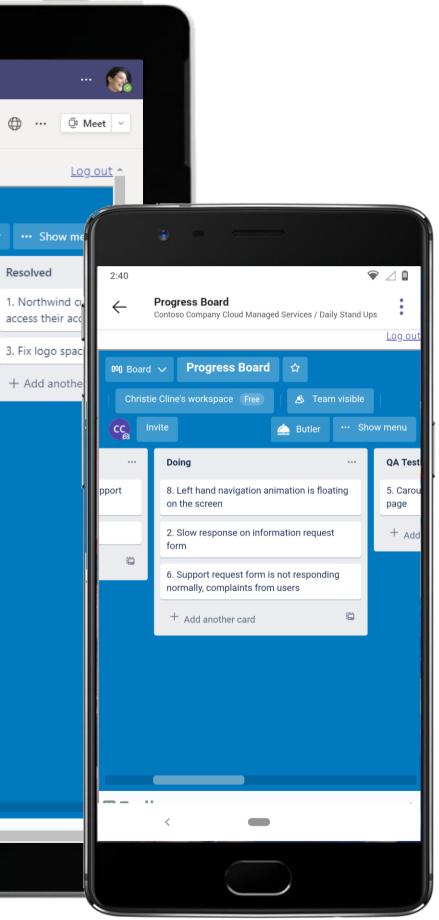
Use the meeting thread for follow-up conversation about meeting outcomes. The Project and Delivery Lead uses the thread to share her meeting notes/MOMs with team members.



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

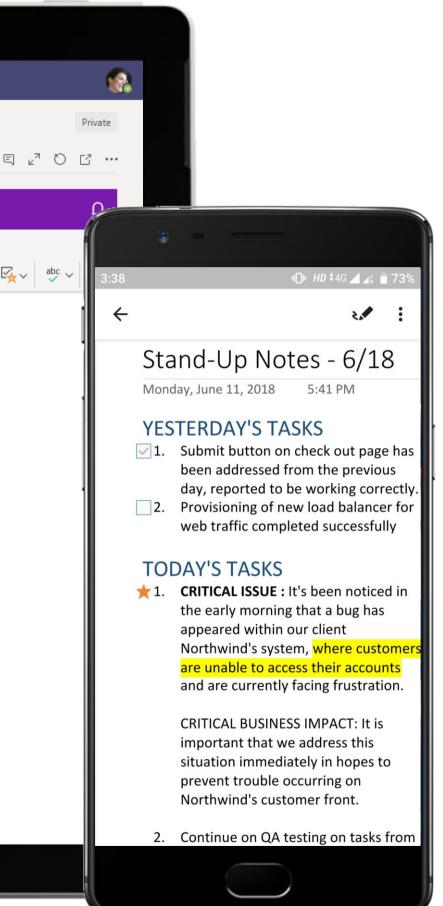


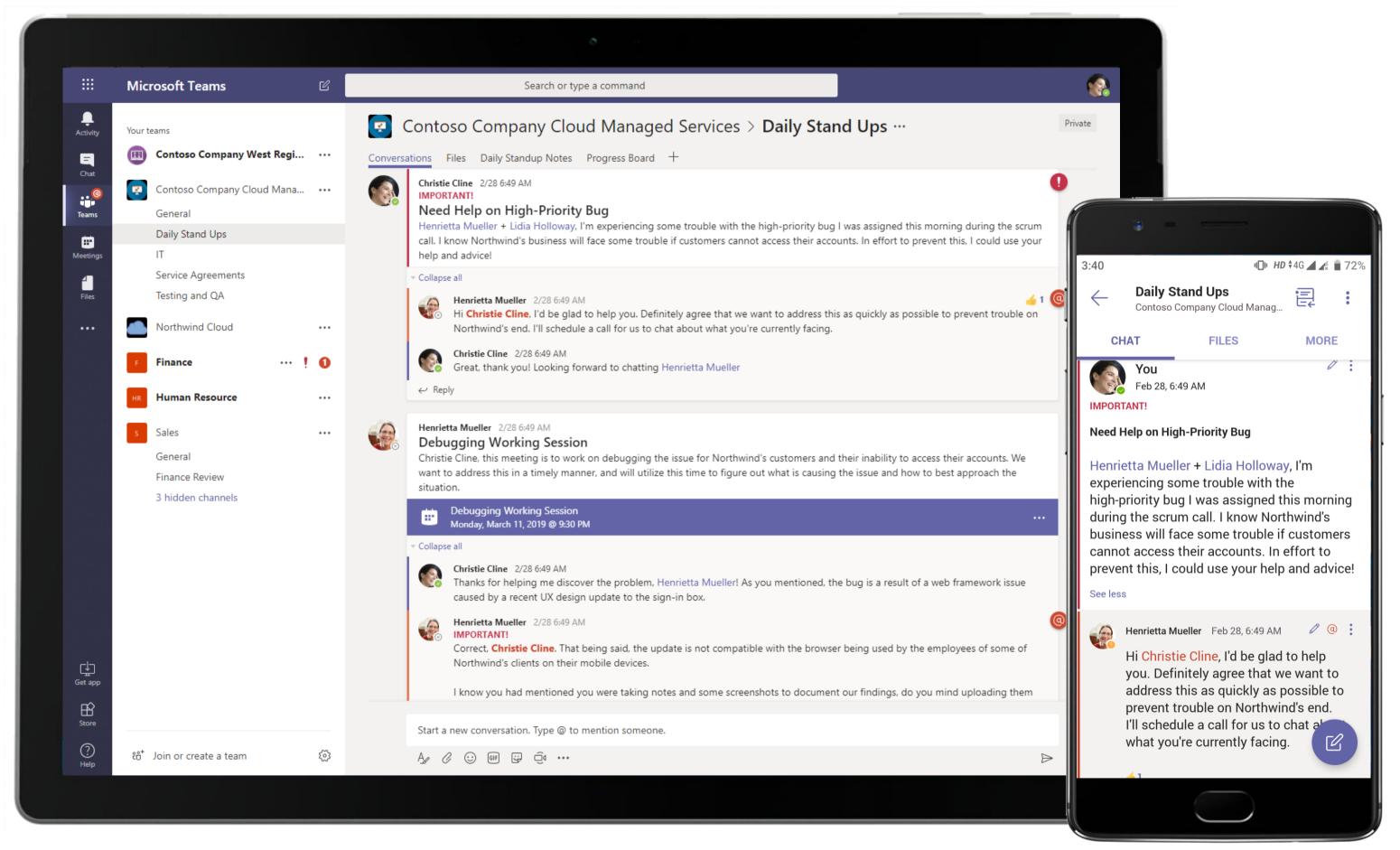


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 IT Service Agreements Testing and QA Northwind Cloud Finance Finance Image: Image: Image:	
 Finance ! ● Finance ! ● Kuman Resource Sales General Finance Review 3 hidden channels CRITICAL BUSINESS IMPACT: It is important that we address this situation immediately in hopes to prevent trouble occurring on Northwind's customer front. Continue on QA testing on tasks from yesterday Delivery ETA to client: Coming Friday 6/22 2 new tasks in VSTS board – assigned to Henrietta and Christie each Progress Board New New Itermited customes of the thereit comes and the same of the thereit to come of the thereit comes of the target of	Meetings IT Service Agreements
Christie Cline	FFinance···HRHuman ResourceSalesGeneralFinance Review
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Enjoy powerful document creation with OneNote in Microsoft Teams. Quickly disseminate meeting outcome and notes among team members with OneNote tabs in channels.

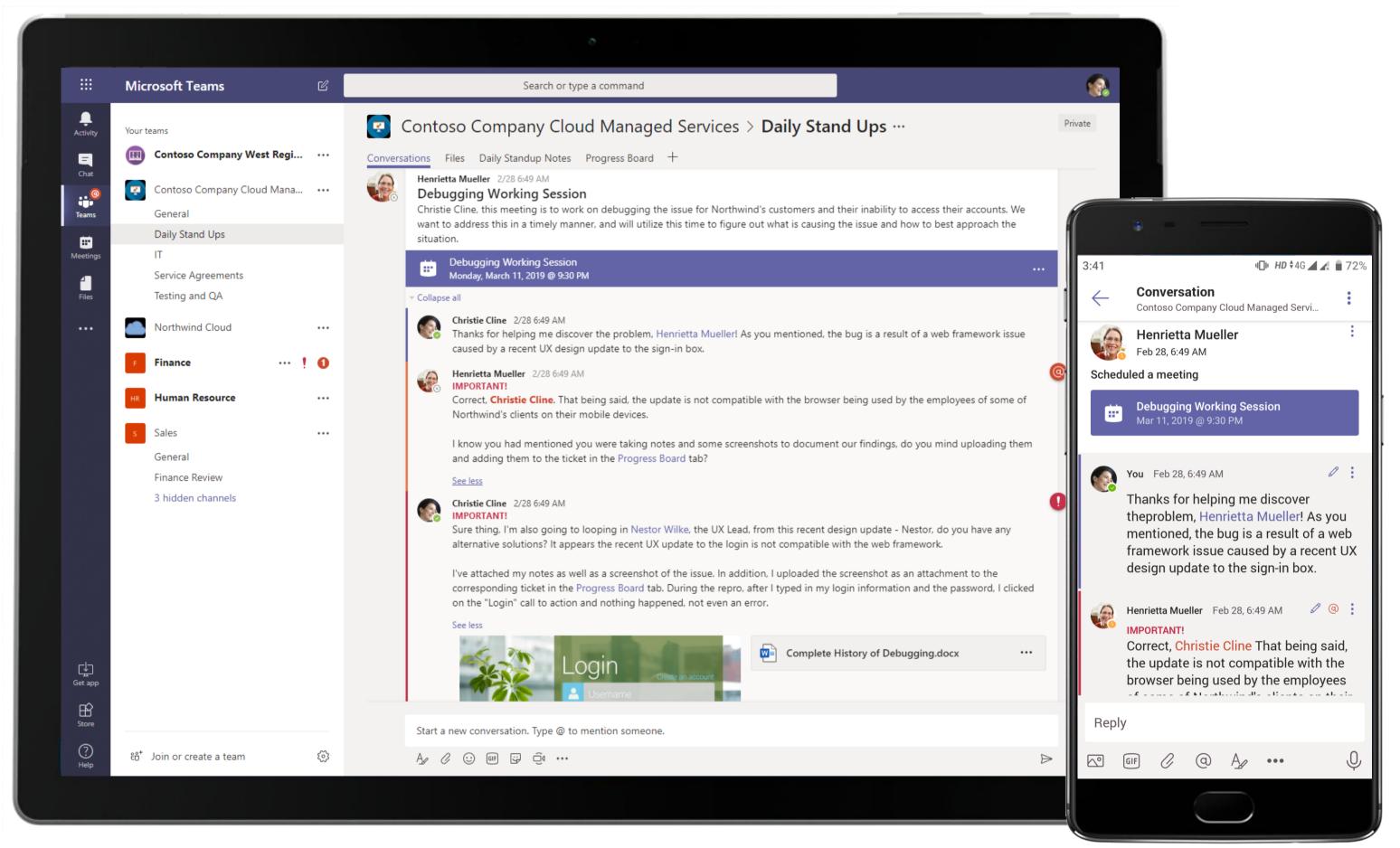






The Analyst brings the team's attention to a high priority bug by beginning a new conversation thread for the issue. Team members engage on the post and reply with thoughts and discussion points.





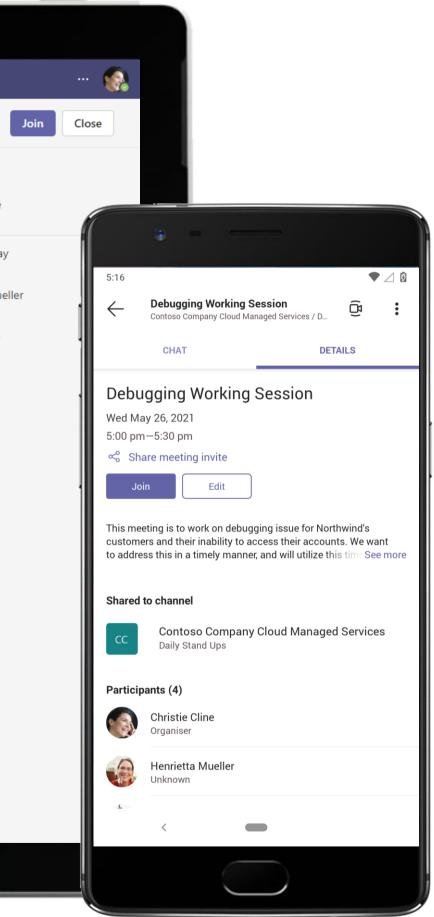
A debugging working session is scheduled to be hosted over a Teams meeting call to help the Analyst address an issue with Northwind's customers.



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iii Teams	Ø	Debugging Working Session	Christie Cline Organizer
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ß		Suggested: 8:30 PM-9:00 PM May 26 11:30 PM-May 27 12:00 AM	Nestor Wilke
Files	Ç	Does not repeat V	
	=	Contoso Company Cloud Managed Services > Daily Stand Ups	
	\odot	Add location	
	·==	B I U	
		This meeting is to work on debugging issue for Northwind's customers and their inability to access their accounts. We want to address this in a timely manner, and will utilize this time to figure out what is causing the issue and how to best approach the situation.	
		Microsoft Teams meeting	
		Join on your computer or mobile app Click here to join the meeting	
		Learn More Meeting options	
Apps			
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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.

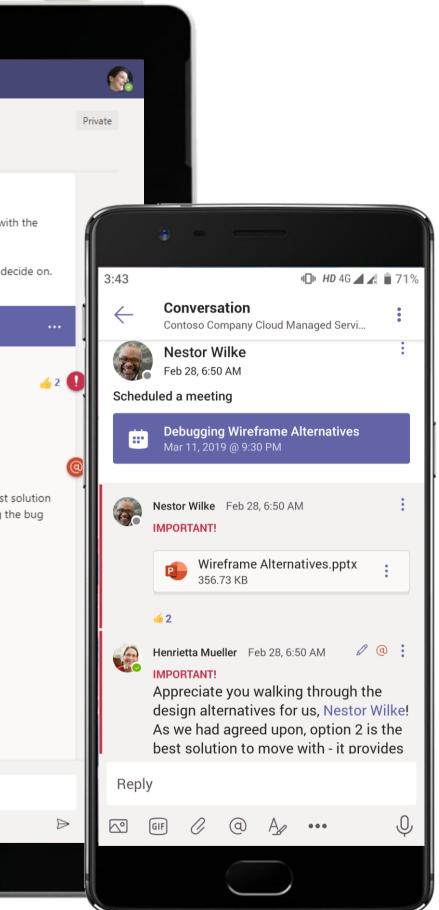


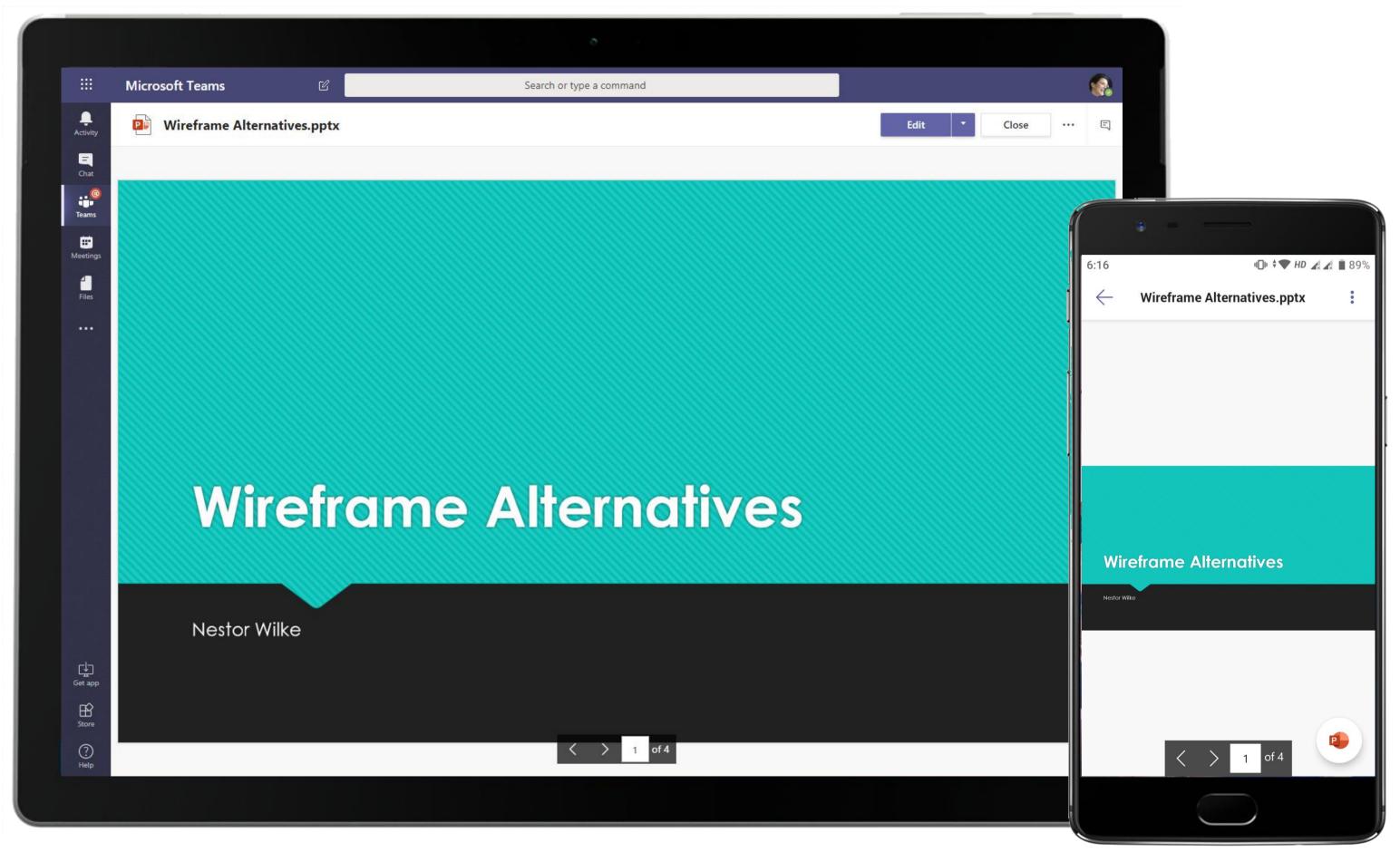


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E Chat	Contoso Company West Regimentation	i •••	Conversations Files Daily Standup Notes Progress Board +
ener Teams	Contoso Company Cloud Mana General	a •••	Nestor Wilke 2/28 6:50 AM Debugging Wireframe Alternatives Henrietta Mueller + Christie Cline, setting this meeting to discuss alternative wireframe solutions for the bug that has occurred wiref
tit Maatiaar	Daily Stand Ups IT		recent UX update on the log in page for Northwind, which is preventing their customers from logging into their accounts.
Meetings	Service Agreements		I've also attached a PowerPoint, which includes the alternative design wireframes as potential solutions that we can discuss and o See less
Files	Testing and QA		Debugging Wireframe Alternatives Monday, March 11, 2019 @ 9:30 PM
	Northwind Cloud	•••	▼ Collapse all
	F Finance	! 0	Nestor Wilke 2/28 6:50 AM
	HR Human Resource		Wireframe Alternatives.pptx ····
	s Sales		Henrietta Mueller 2/28 6:50 AM IMPORTANT!
	General		Appreciate you walking through the design alternatives for us, Nestor Wilke! As we had agreed upon, option 2 is the bes
	Finance Review 3 hidden channels		to move with - it provides a clear layout for the Northwind customers and will work with the web framework, preventing from occurring again.
			Myself and Christie Cline will go ahead and implement the new solution.
			See less
			Password
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Store			Start a new conversation. Type @ to mention someone.
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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.

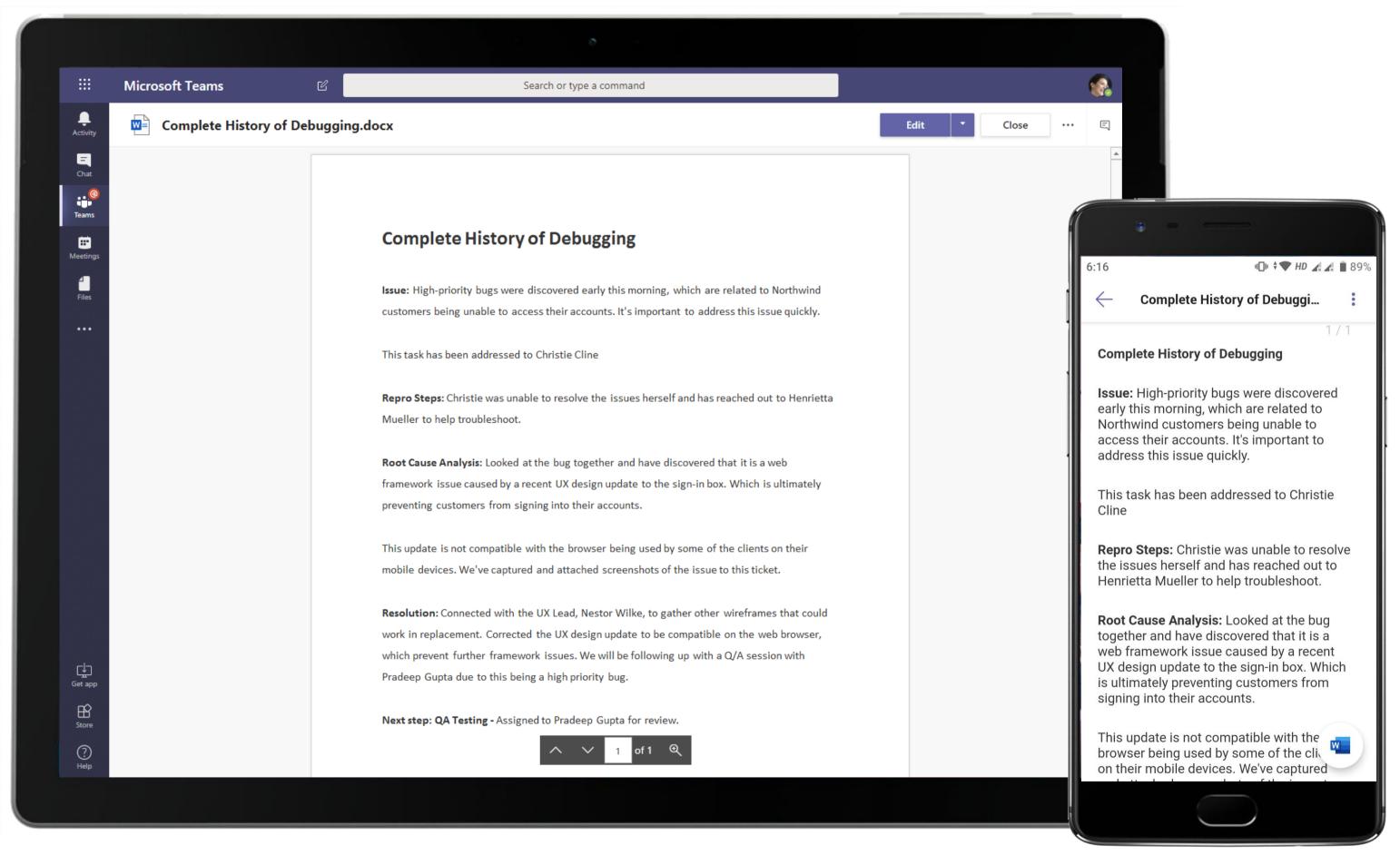






Edit your presentation, customize and review it on the go, collaborating with others in real time within Teams. The PowerPoint app right inside Teams brings the full Office experience inside Teams.





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?

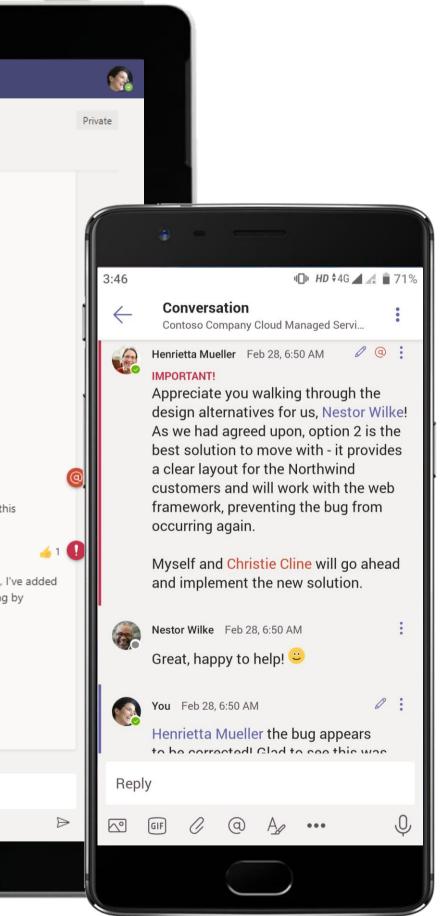




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Begin conversations with team members and pull them into the discussion with @mention tags. The Analyst marks her message important, turning the channel's focus on her post.

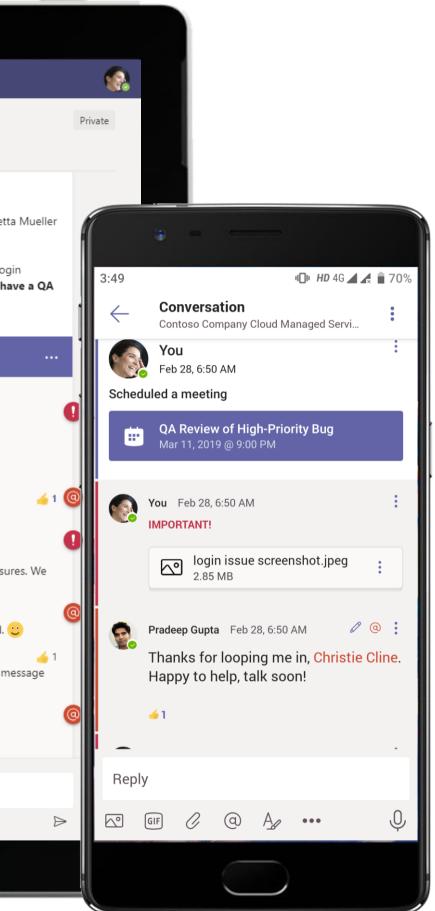




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	回 Contoso Company West Regi.		Conversations Files Testing QA Handbook +
Chat	Contoso Company Cloud Mana. General Daily Stand Ups IT Service Agreements	•••	Christie Cline 2/28 6:50 AM QA Review of High-Priority Bug Pradeep Gupta, it was discovered that a bug has occurred impacting Northwind customers from accessing their accounts. Henrie and I have discovered it was due to a recent web framework issue caused by a UX update to the sign-in box. We have documented and addressed this issue in the VSTS. I also added the screenshot of what I noticed. When I filled out the I information and clicked on the "Login" button, nothing happened. Since this was marked as a high-priority bug, we want to session with you to discuss our process and confirm the issue resolution. The VSTS ticket will give you full history:
Files	Testing and QA		See less
	Northwind Cloud		QA Review of High-Priority Bug Monday, March 11, 2019 @ 9:00 PM
	F Finance	! 0	 ✓ Collapse all
	HR Human Resource		Christie Cline 2/28 6:50 AM IMPORTANT!
Get app	s Sales General Finance Review 3 hidden channels		Image: Second
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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.



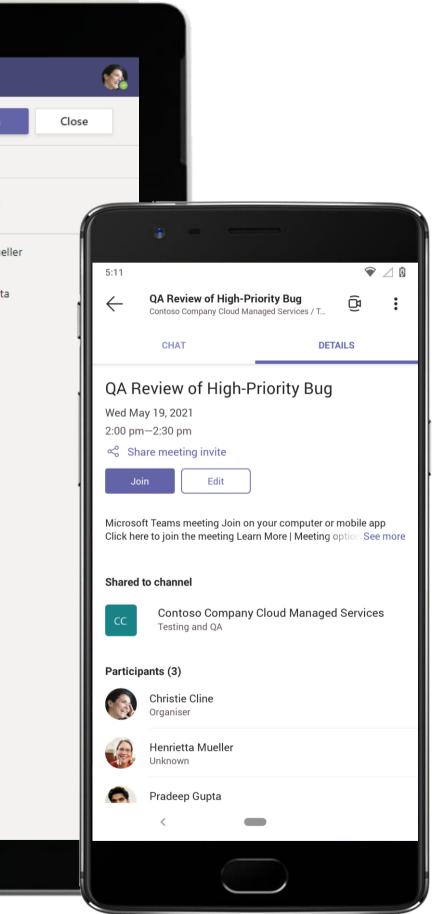


Project Management and Delivery - QA Process for Testing a High-Priority Bug

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Microsoft Teams enables protected meetings and screen share within channels. A QA review meeting is scheduled in an exclusive testing channel to review the bug fix.

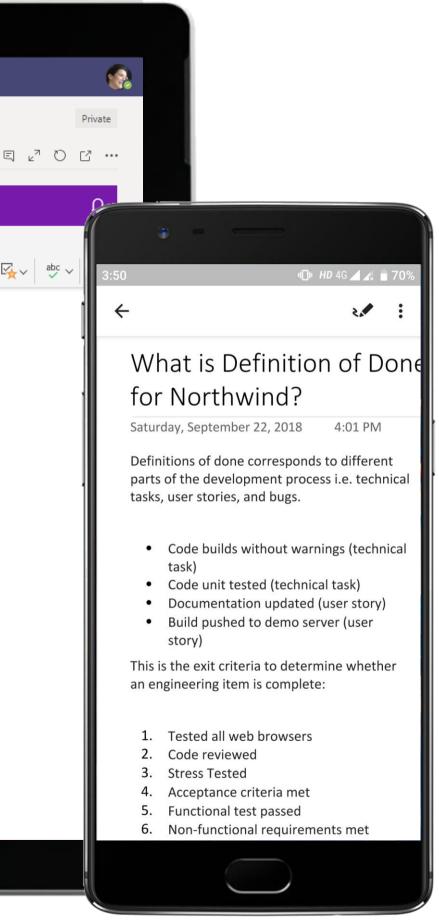




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Files	Testing and QA		> What is Definition of Done for Northwind?
	Northwind Cloud		Saturday, September 22, 2018 4:01 PM
	F Finance	! 0	Definitions of done corresponds to different parts of the development process i.e. technical tasks, user stories, and bugs.
	HRHuman ResourceSSalesGeneralFinance Review3 hidden channels		 Code builds without warnings (technical task) Code unit tested (technical task) Documentation updated (user story) Build pushed to demo server (user story) This is the exit criteria to determine whether an engineering item is complete: Tested all web browsers Code reviewed Stress Tested Acceptance criteria met Functional requirements met Test cases Other areas impacted by the fix? Acceptance by Q/A or development lead
Get app Store			Engineers and QA owners for each task in the development process must ensure the definition is thoroughly followed and met before delivering a solution to the client.
? Help	ిం ⁺ Join or create a team	3	

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



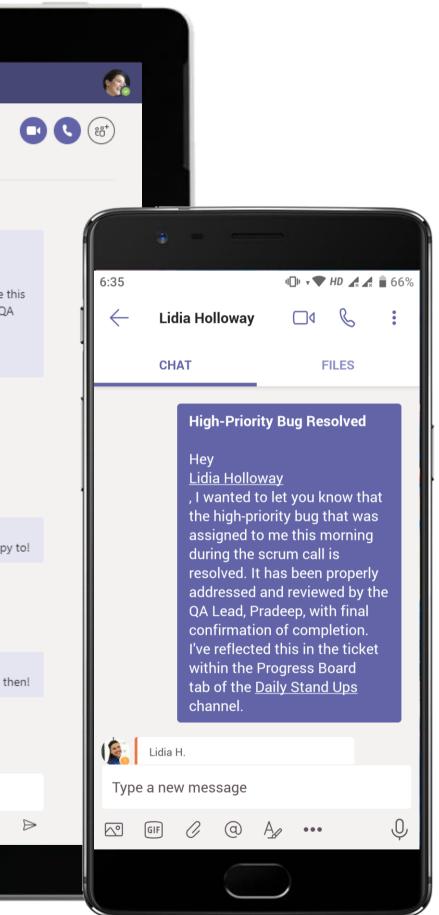


Project Management and Delivery - QA Process for Testing a High-Priority Bug

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Chat	Recent Planner 6/2 Task "Three email blasts to List A at 2-wee			ed Lidia Holloway to the conversation.	
eams	Vou: Sounds good, talk to you then!		eniiste eniie adde	2/28 6:56 AM	
 Meetings	Suggested			High-Priority Bug Resolved	
Files	Adele Vance			Hey Lidia Holloway, I wanted to let you know that the high-priority bug that w morning during the scrum call is resolved. It has been properly addressed and Lead, Pradeep, with final confirmation of completion. I've reflected this in the	d reviewed by the Q
	Allan Deyoung			Progress Board tab of the Daily Stand Ups channel.	
	Assistant @ Zoom.ai	()		t, Christie Cline! Thank you for updating me on the status of this bug. The client	(a) has
	Emily Braun		Would you mi	ed out about the issue and was closely monitoring the situation.	e bug
	😪 Henrietta Mueller		and how you	were able to resolve it?	
	Irvin Sayers				2/28 6:56 AM Would be happ
	😰 Isaiah Langer	(Lidia Holloway	2/28 6:56 AM you to the meeting I've set up in the Review Meetings channel of the Northwind	Cloud
	🧞 Joni Sherman	100	team	you to the meeting the set up in the Review Meetings chamler of the Northwind	cioud
	🧙 Jordan Miller			2/28 6:5 Sounds	66 AM s good, talk to you t
¢	(Lidia Holloway				
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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.

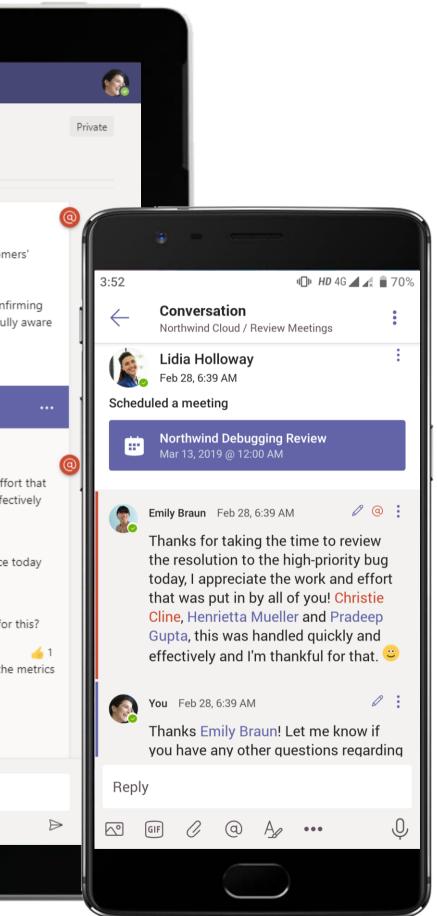




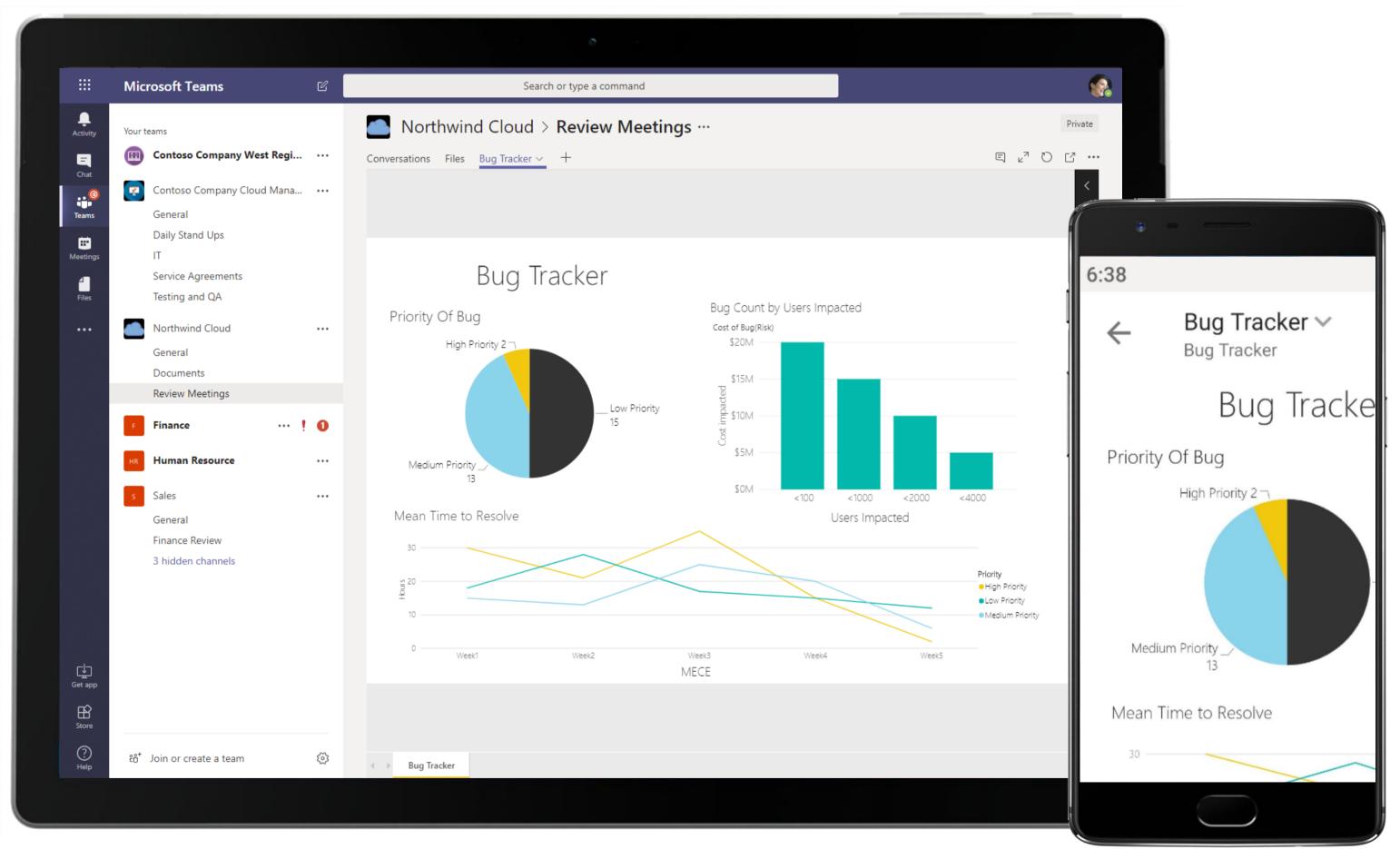
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III Mie	crosoft Teams	C	Search or type a command
Activity Your	teams		Northwind Cloud > Review Meetings …
E 1	Contoso Company West •••	· 2 Conversa	
Chat	Contoso Company Cloud Mana General		February 28, 2019 Lidia Holloway 2/28 6:39 AM Edited Northwind Debugging Review TestingandQA + Emily Braun, scheduling time to go over the bug discovered this morning impacting Northwind custom
Meetings	Daily Stand Ups IT Service Agreements Testing and QA	0	ability to access their accounts. This was due to a web framework issue that had not been updated correctly. Henrietta Mueller and Christie Cline have already reviewed the bug and uncovered the issue, thus resolving it and conf with our QA Lead, Pradeep Gupta. We want to discuss the issue and resolution with Emily as well to make sure she is ful
	Northwind Cloud General		of the situation. See less Northwind Debugging Review We have been done with the state of the situation of t
	Documents Review Meetings		Wednesday, March 13, 2019 @ 12:00 AM Collapse all
F	Finance !	0	Emily Braun 2/28 6:39 AM Edited Thanks for taking the time to review the resolution to the high-priority bug today, I appreciate the work and effer was put in by all of you! Christie Cline, Henrietta Mueller and Pradeep Gupta, this was handled quickly and effer and I'm thankful for that. 20
s	Sales General		Christie Cline 2/28 6:39 AM Edited Thanks Emily Braun! Let me know if you have any other questions regarding the process that was put into place to make sure the bug was resolved.
	Finance Review 3 hidden channels		Emily Braun 2/28 6:40 AM Actually, I'd like to know about the other bugs the team is working on as well. Do you have an overall tracker for
ME	Major Events Team		Lidia Holloway 2/28 6:40 AM Emily Braun, yes we do! I've gone ahead and installed the Bug Tracker as a tab in this channel, which displays the of open and closed bugs.
Get app	Event Planning Media and Marketing !	0	Bug Tracker
Store	World Series !	0	Start a new conversation. Type @ to mention someone.
? Help ≗ö⁺	Join or create a team	£33	

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.





Project Management and Delivery - QA Process for Testing a High-Priority Bug



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)

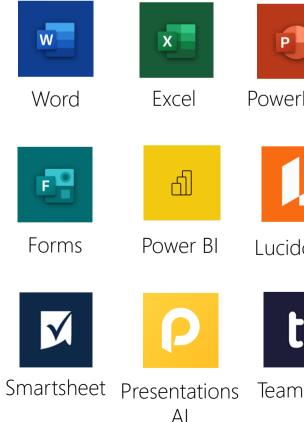
These scenarios will illustrate how Teams can help leadership team and executives, involved in planning and strategizing business objectives, communicate effectively to ensure positive business outcomes.

Planning & Strategy Superpowers in Teams

Capabilities and features used...

- Participate in instant, open-channel communication ٠
- 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 ٠
- Help securely collaborate with teammates using familiar • applications within a single environment

Apps that enable an immersive experience in Teams





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rPoint	OneNote	Asana	monday.com
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dchart	Trello	Shifts	MURAL
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nwork	Adobe Sign	Tasks by Planner and To Do	Communities

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

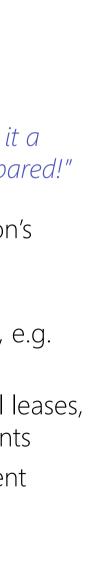


Director

"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. ٠
- 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. ٠
- Appreciates teams' efforts and presentation at short notice. •

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

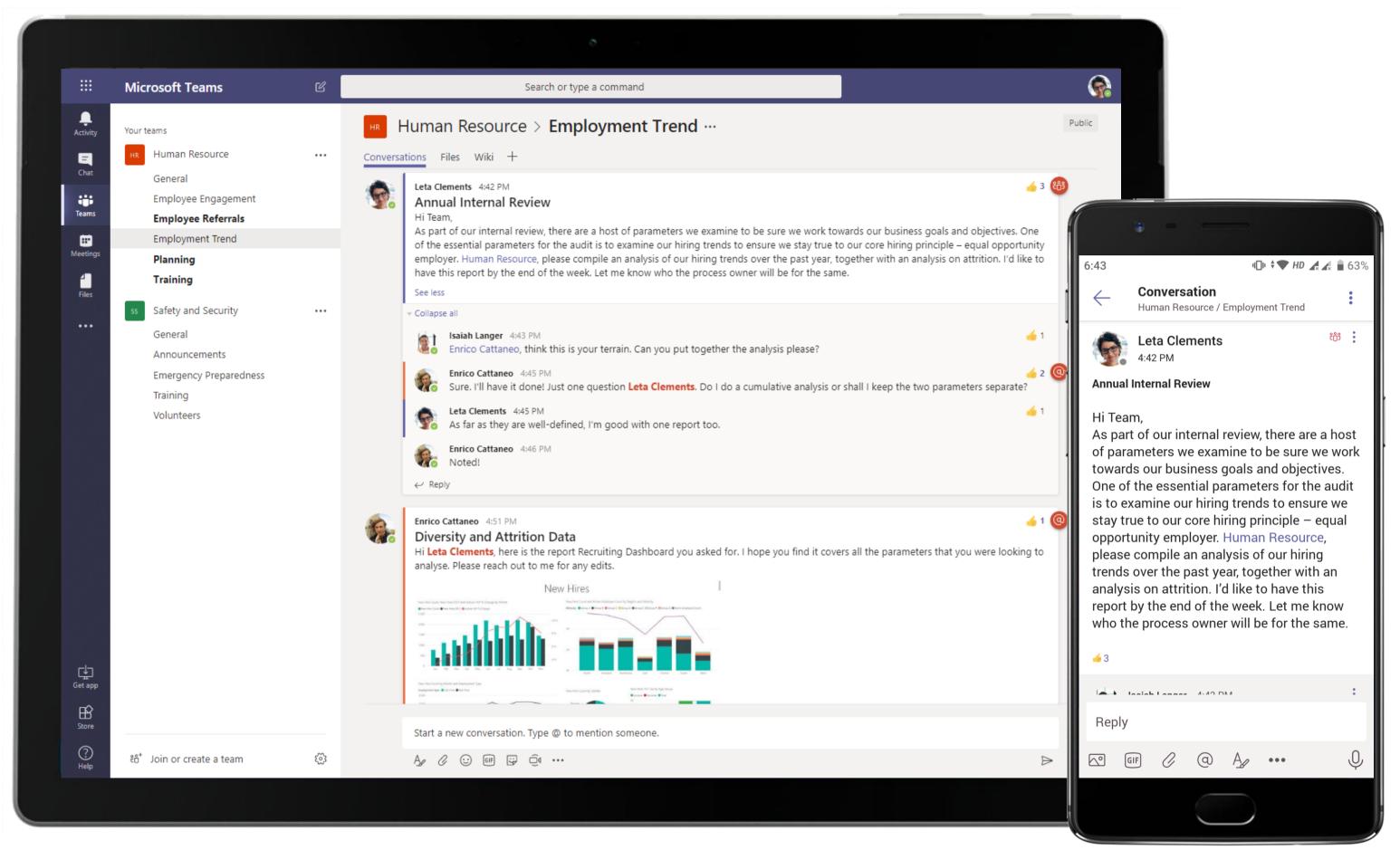
- Reach entire team by creating conversation threads in channels. •
- Keep track of responses with alerts in the activity feed thanks to @mentions and reply • notifications.
- Utilize Power BI to compile and review data in a highly visual format. •



Which app integrations on Teams made it possible?

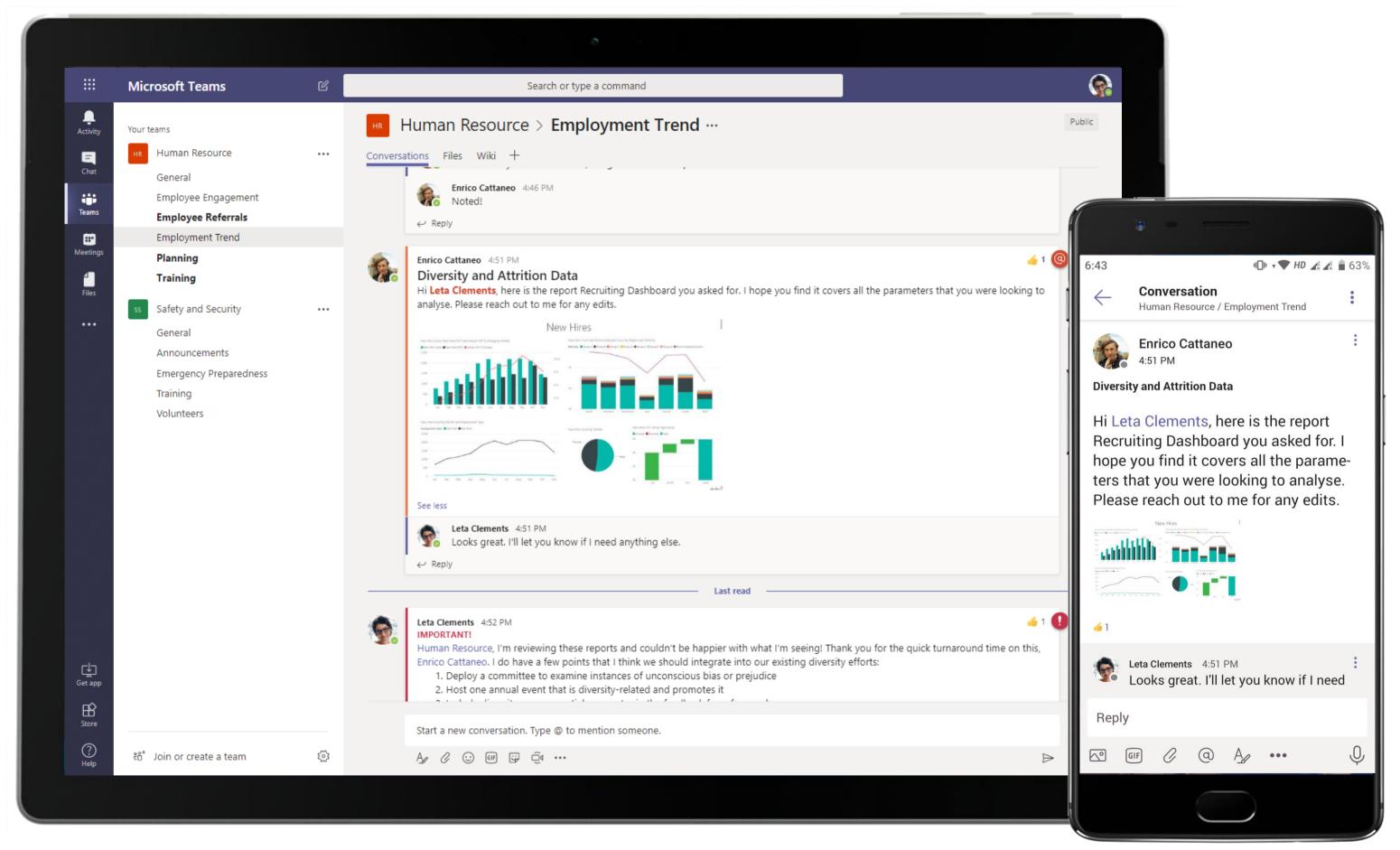


Power BI



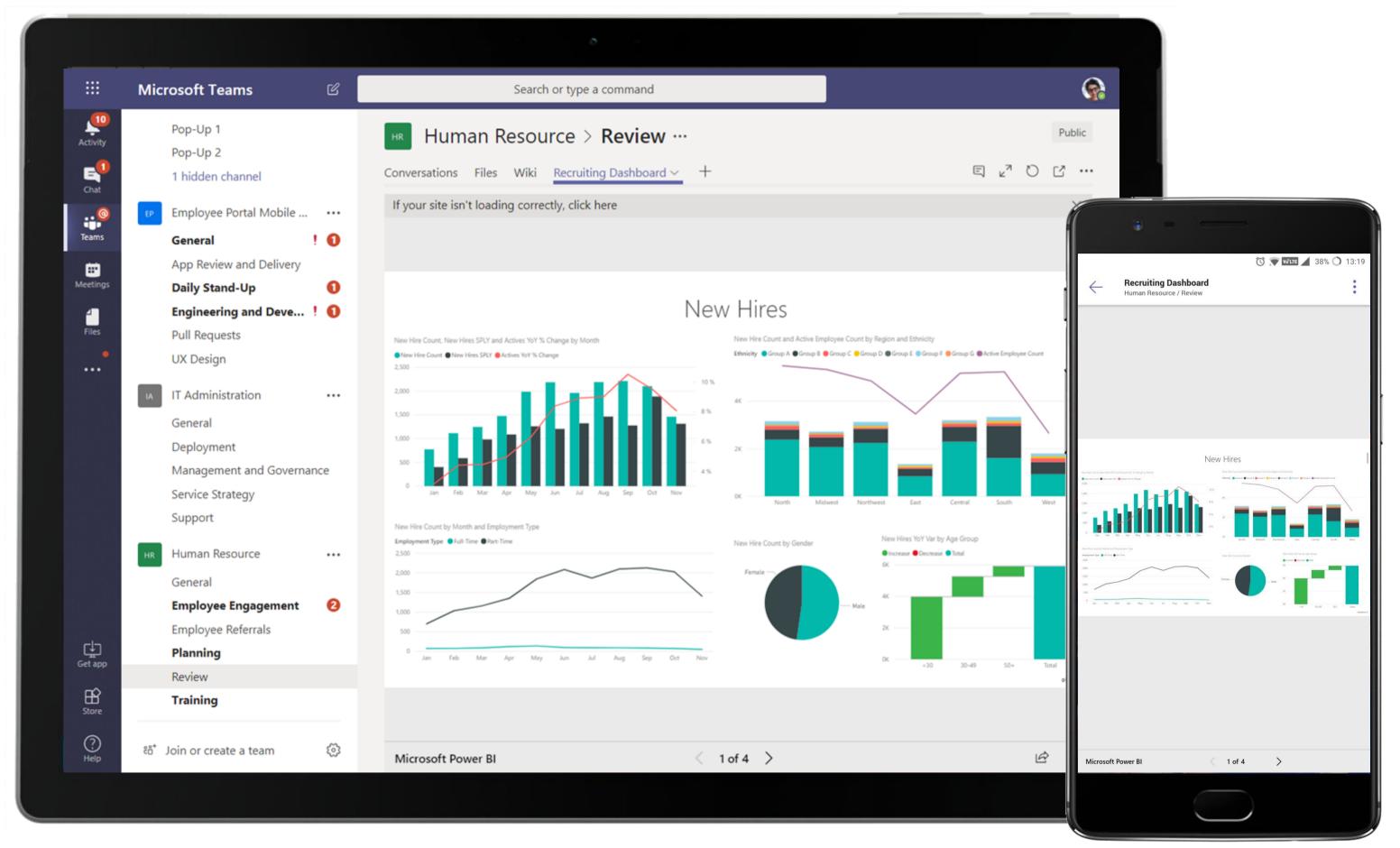
@mention in channels and chats allow users to tag individuals, channels or entire team to ensure relevant people are looped in. The Director posts a message in the channel and @mentions the team to get everyone's attention.





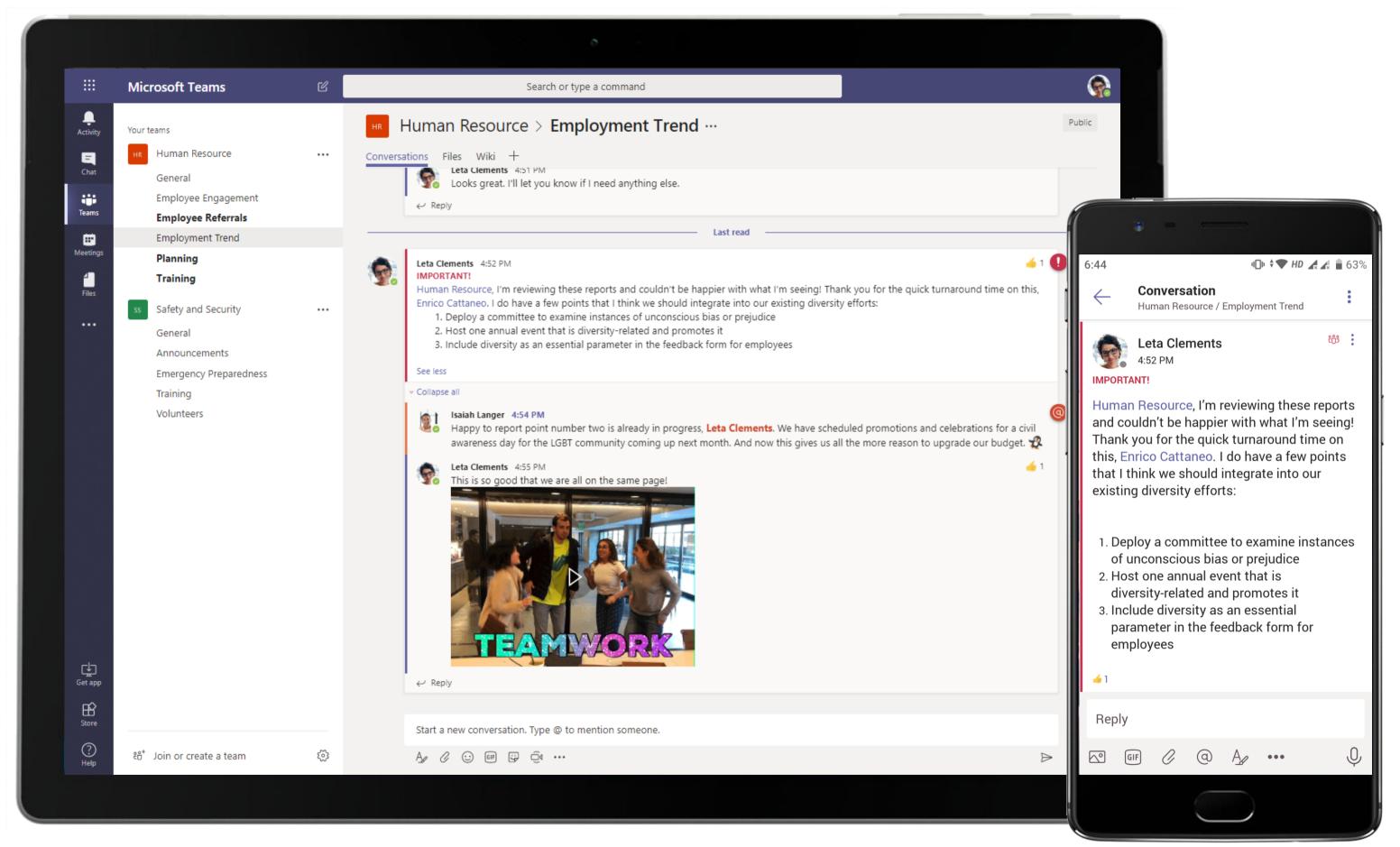
Channel conversations are also a great place to share snippets of your visual data for team members to understand the discussion points without opening a tab or a file. An HR associate presents diversity and attrition data in the channel for everyone's consumption.





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.



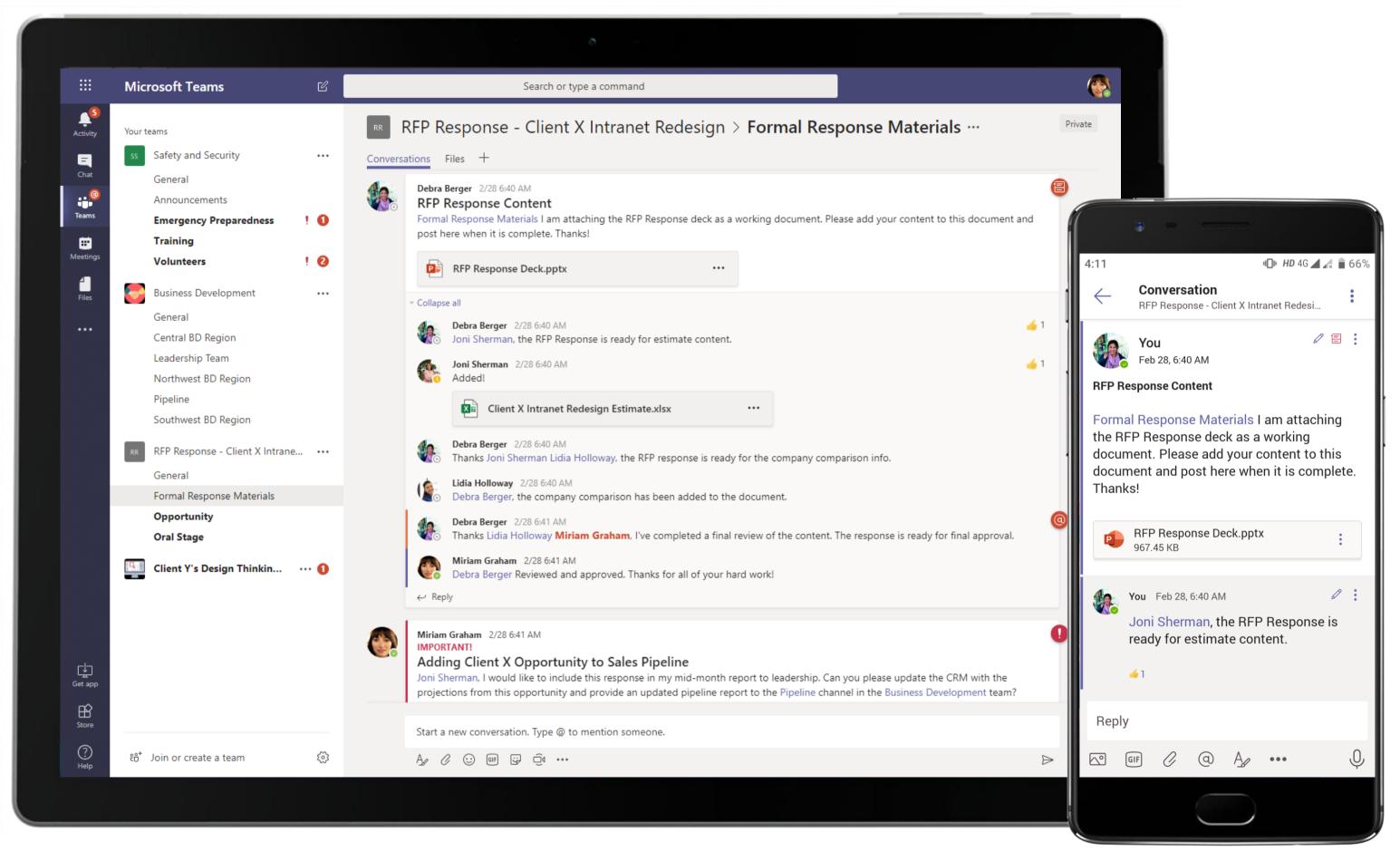
Which app integrations on Teams made it possible?





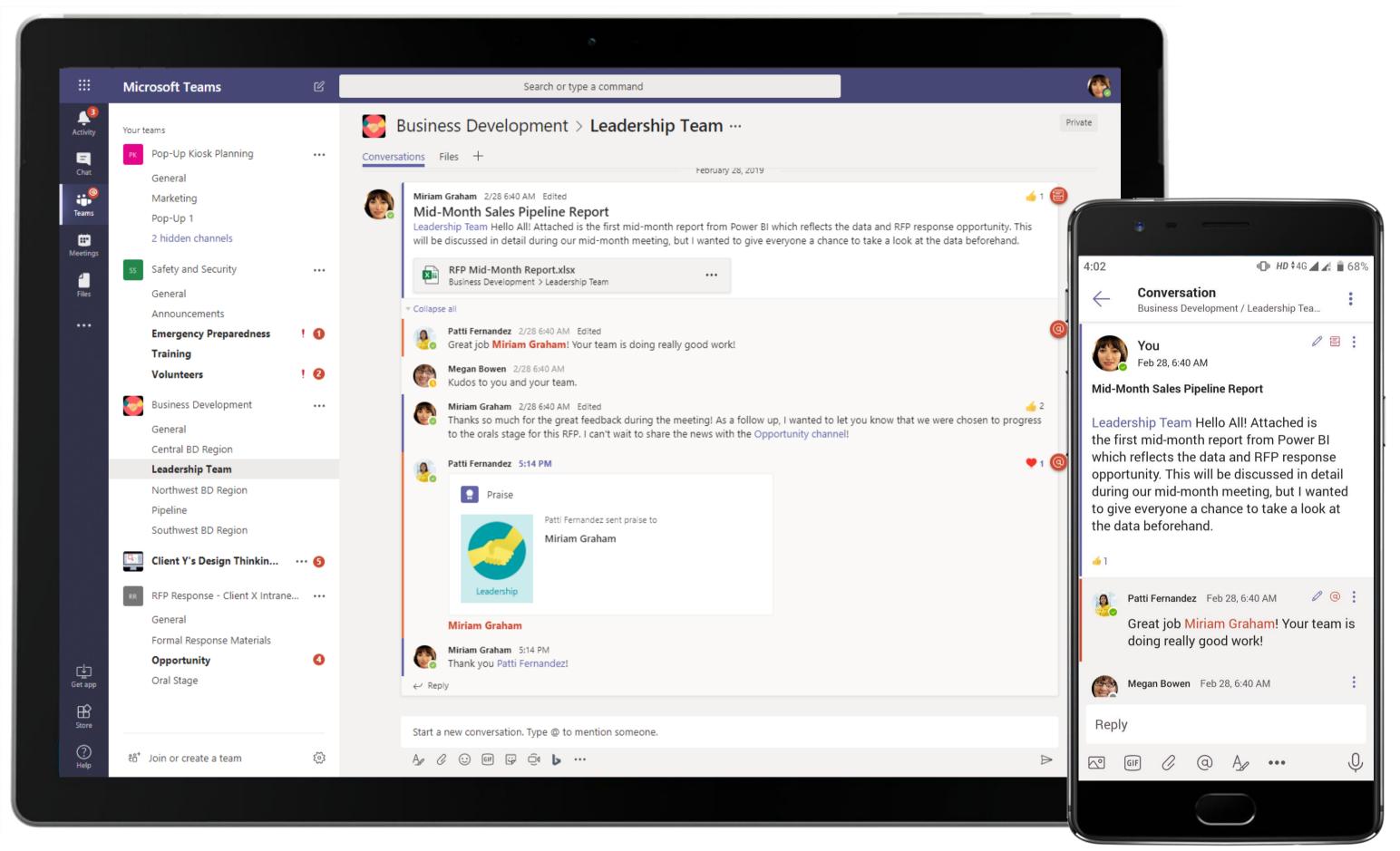






Communicate in open-channel conversations and keep team members up-to-date. The Vice President initiates a channel conversation and @mentions Sales Manager to assign a task.





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.

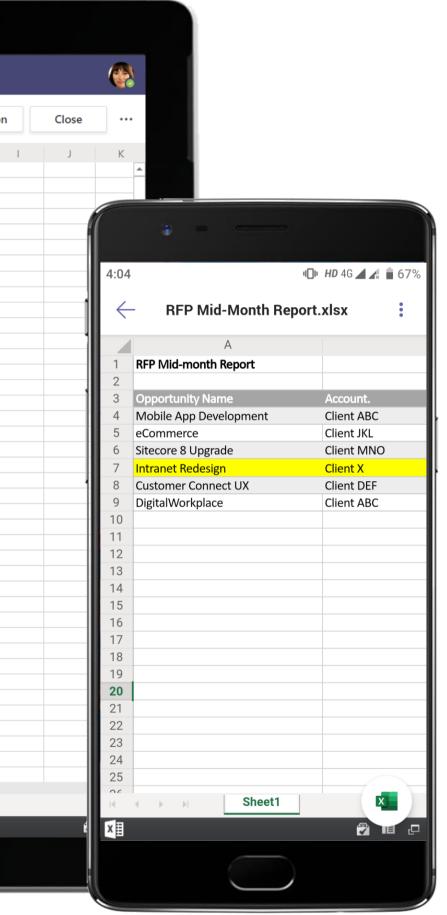


Planning & Strategy (Headquarters) - Mid-Month Sales Pipeline Report

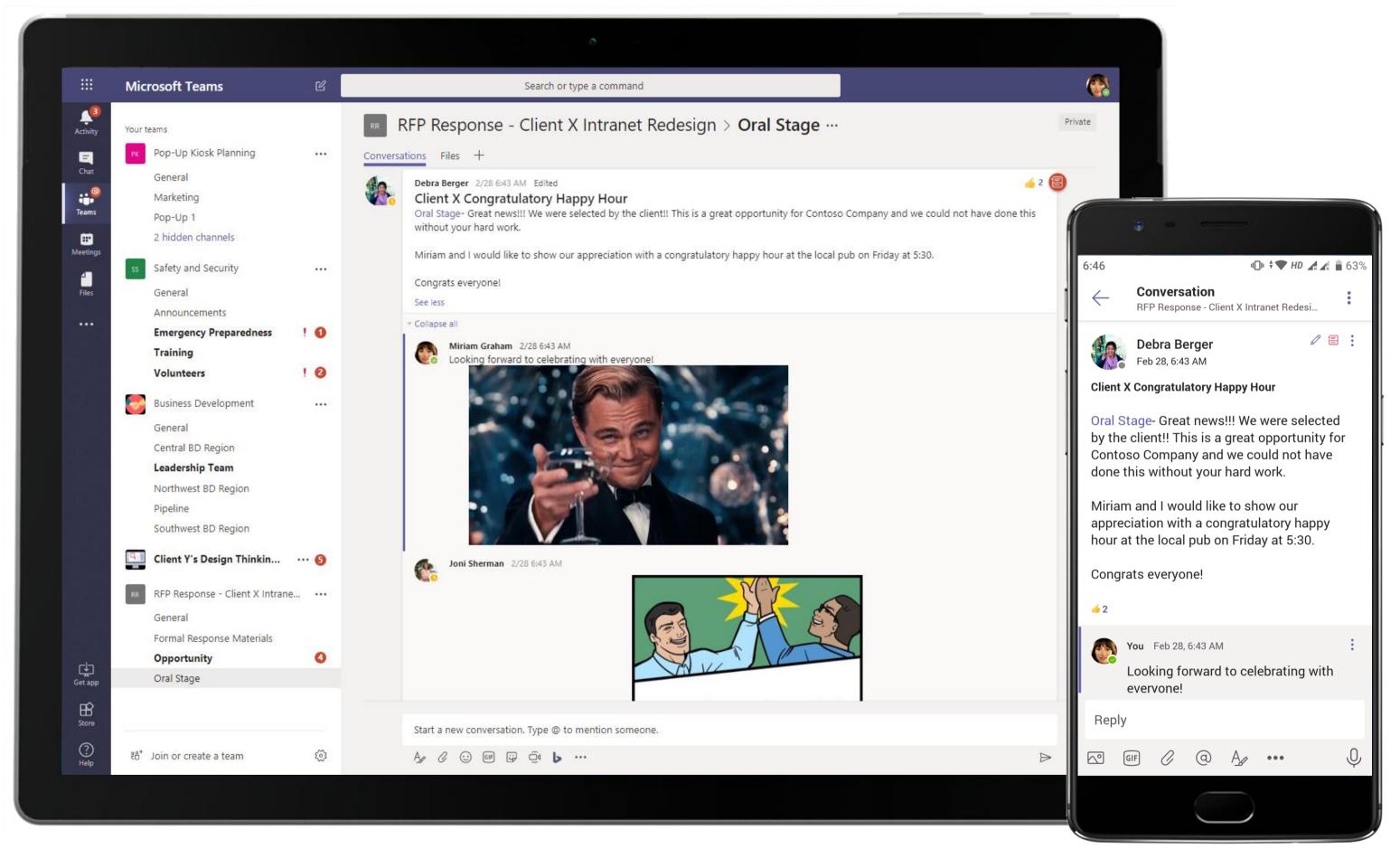
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		Sitecore 8 Upgrade Intranet Redesign	Client MNO Client X				3 \$650,000 3 \$2,000,000				+
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The VP of Sales submits her mid-month report in the channel using Excel. This spreadsheet is stored in the cloudenabled repository with Files.





Planning & Strategy (Headquarters) - Mid-Month Sales Pipeline Report



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.

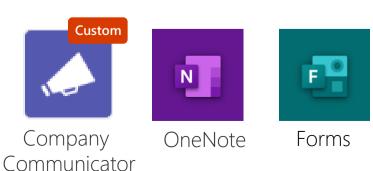
- Creates a collaborative OneNote tab which lays out a comprehensive plan of what her team needs to do in the event of an earthquake.
- Invites team members and security personnel to edit the plan.
- Freezes the edits and holds a channel meeting to alert department heads.
- Creates a conversation alerting 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.

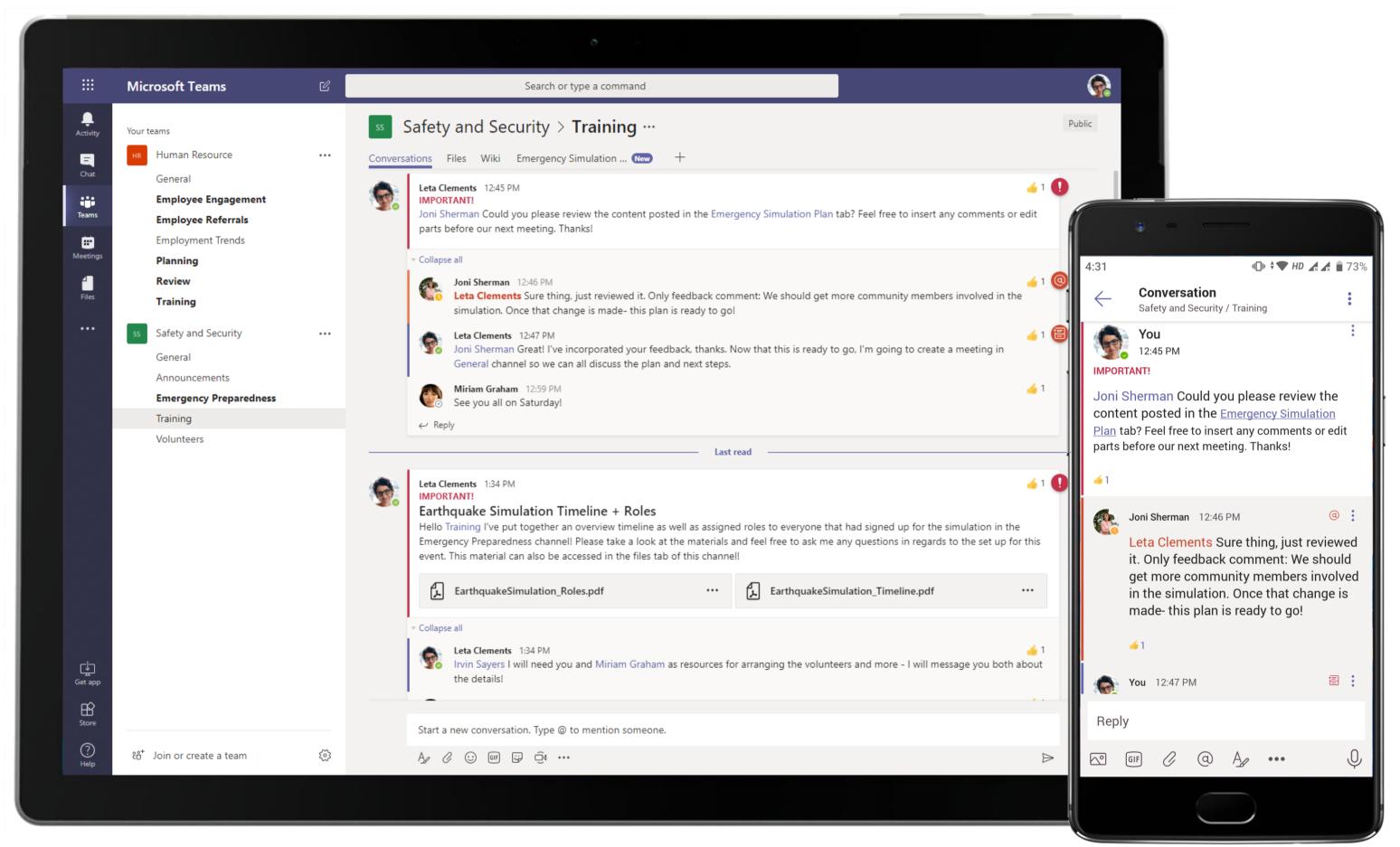
How did Teams help the Director execute her roles and responsibilities?

- 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.



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es	Training		Plan of Action Friday, June 21, 2019 12:44 PM		
	Safety and Security General Announcements Emergency Preparedness Volunteers		 Preparedness The primary dangers to workers result from: being struck by structural components or furnishings, inadequately secured stored materials, burns resulting from building fires resulting from gas leaks or electrical shorts, or exposure to chemicals released from stored or process chemicals. Many of the hazards to workers both during and following an earthquake are predictable and may be reduced through hazard identification, planning, and mitigation. There are many things you can do to prepare your workplace before an earthquake occurs: Pick "safe places". A safe place could be under a sturdy table or desk or against an interior wall away from windows, bookcases or tall furniture that could fall on you. The shorter the distance to move to safety, the less likely that you will be injured. Injury statistics show that people moving as little as ten feet during an earthquake's shaking are most likely to be injured. Practice drop, cover, and hold-on in each safe place. Drop under a sturdy desk or table and hold on to one leg of the table or desk. Protect your yees by keeping your head down. Practice these actions so that they become an automatic response. Practice these safe earthquake procedures (i.e., drop, cover, and hold-on) at least twice a year. Arequent practice will help reinforce safe behavior. When an earthquake or other disaster occurs, many people hesitate, trying to remember what they are supposed to do. Responding quickly and automatically may help protect you from injury. Make a plan for workers to follow in the event of an earthquake and be sure that it includes the following precautions: 		
			Aftershocks are smaller earthquakes that follow the main shock and can cause further damage to weakened buildings. After-shocks can occur in the first hours, days, weeks, or even months after the quake. Be aware that some earthquakes are actually foreshocks, and a larger earthquake might occur.		
itore	eిో Join or create a team	53	 Wait in your safe place until the shaking stops, then check to see if you are hurt. You will be better able to help others if you take care of yourself first, and then check the people around you. Move carefully and watch out for things that have fallen or broken, creating hazards. Be ready for aftershocks. Be on the lookout for fires. Fire is the most common earthquake-related hazard, due to broken gas 		

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.



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2.4

Plan of Action

Friday, June 21, 2019 12:44 PM

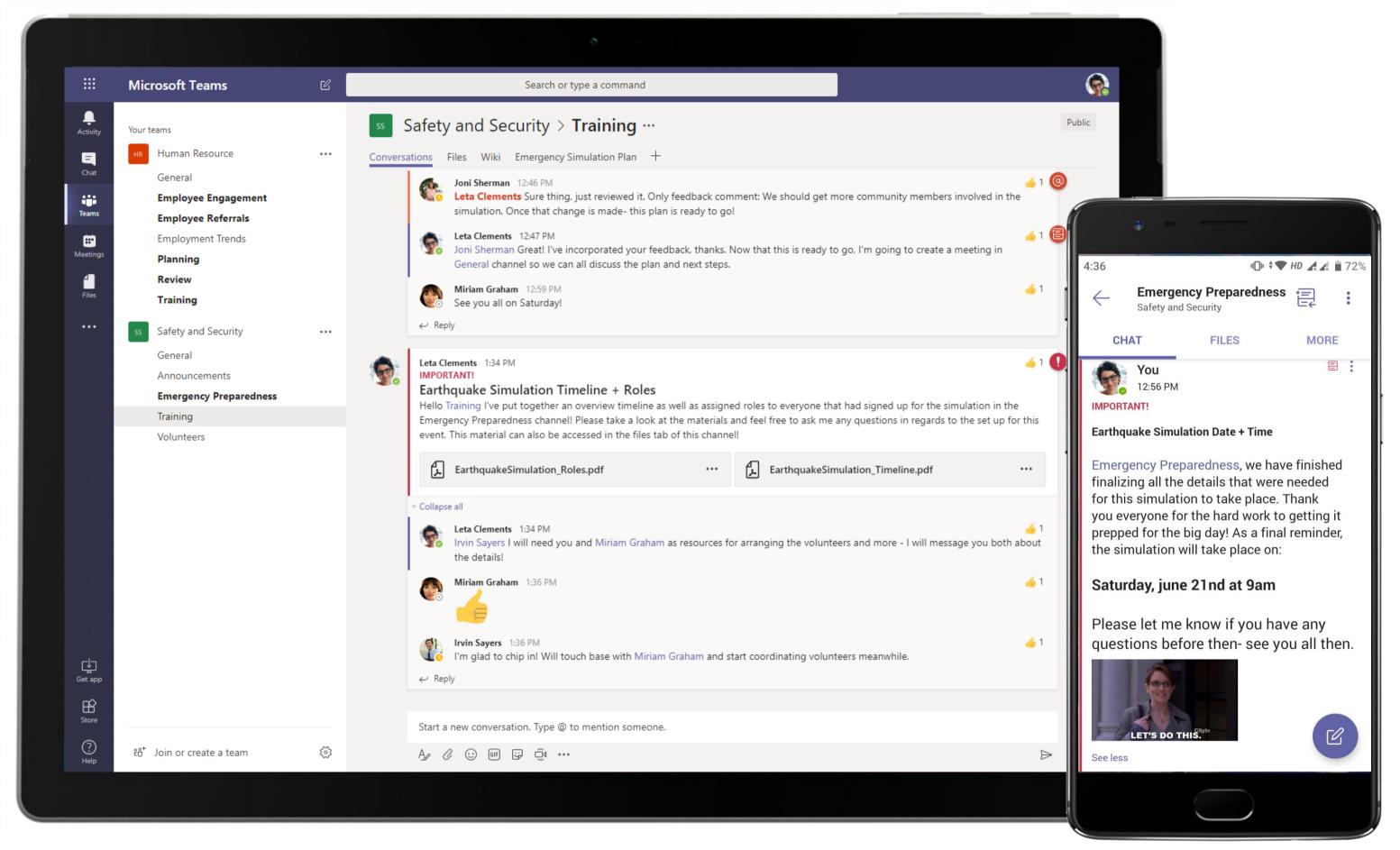
Preparedness

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The primary dangers to workers result from: being struck by structural components or furnishings, inadequately secured stored materials, burns resulting from building fires resulting from gas leaks or electrical shorts, or exposure to chemicals released from stored or process chemicals. Many of the hazards to workers both during and following an earthquake are predictable and may be reduced through hazard identification, planning, and mitigation.

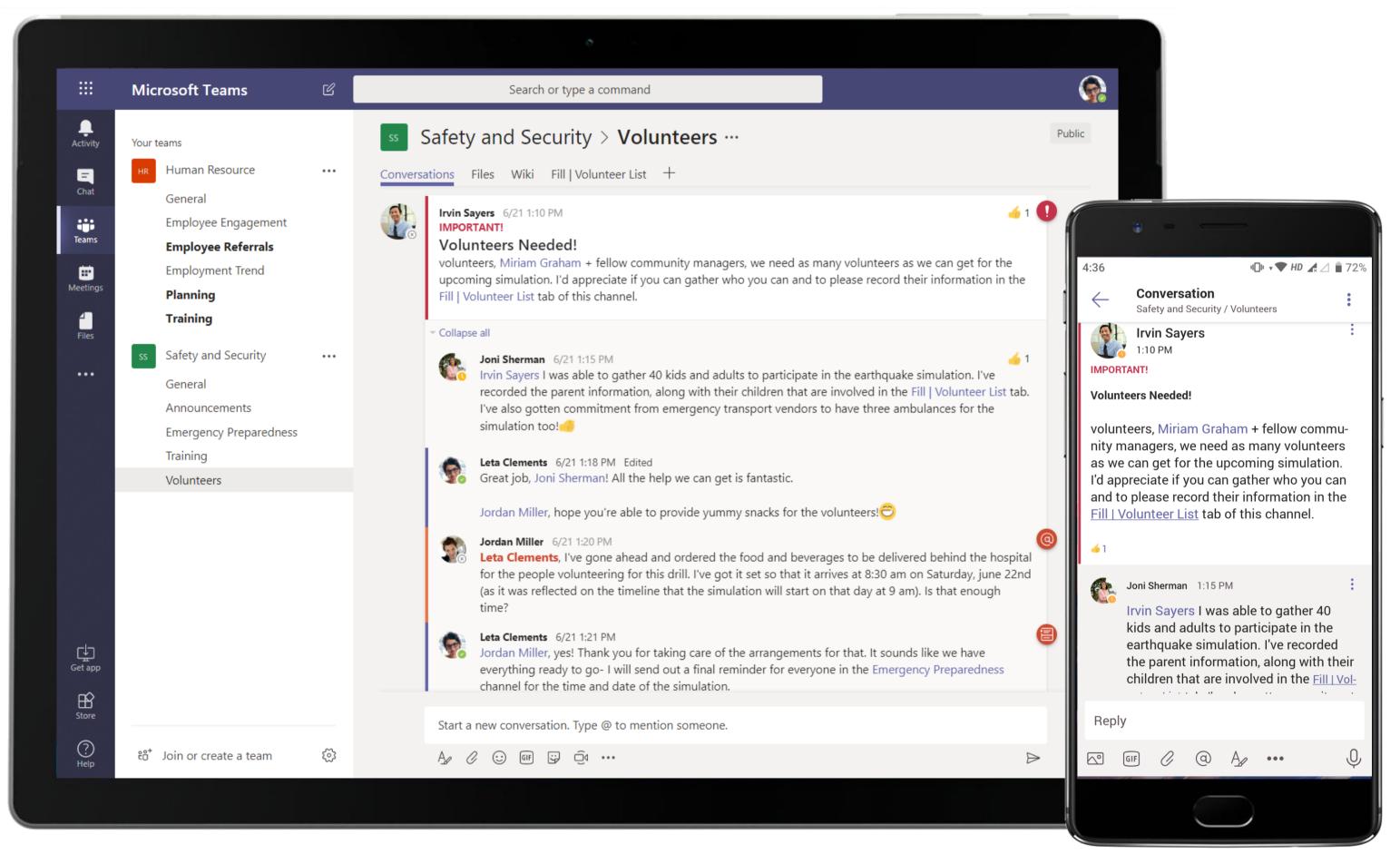
There are many things you can do to prepare your workplace before an earthquake occurs:

• Pick "safe places". A safe place could be under a sturdy table or desk or against an interior wall away from windows, bookcases or tall furniture that could fall on you. The shorter the



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.





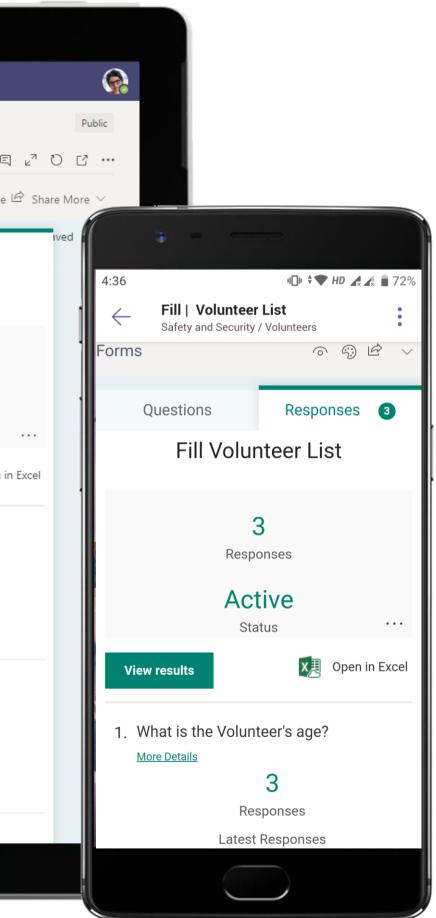
Use a Forms tab in the channel to record information and keep the information easily accessible for other team members. Volunteer sign-up is made so much more convenient and in-the-moment pinning a form right inside Teams.

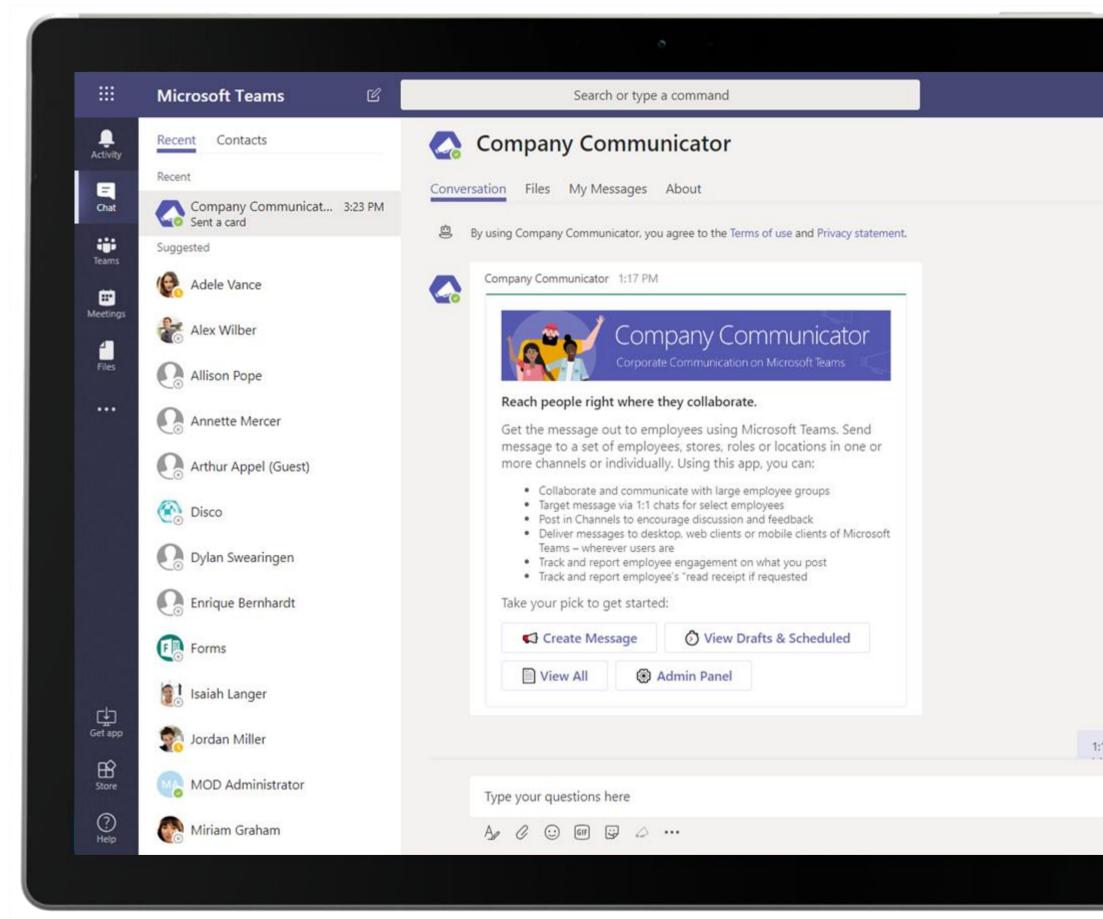


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ţ				2. What is the name of the Volunteer? More Details	?	Latest Responses
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Here's more of what you can do with Forms: work with team members to create and edit a form, add an existing form to collect fresh responses, or share the responses you have collected from a form.



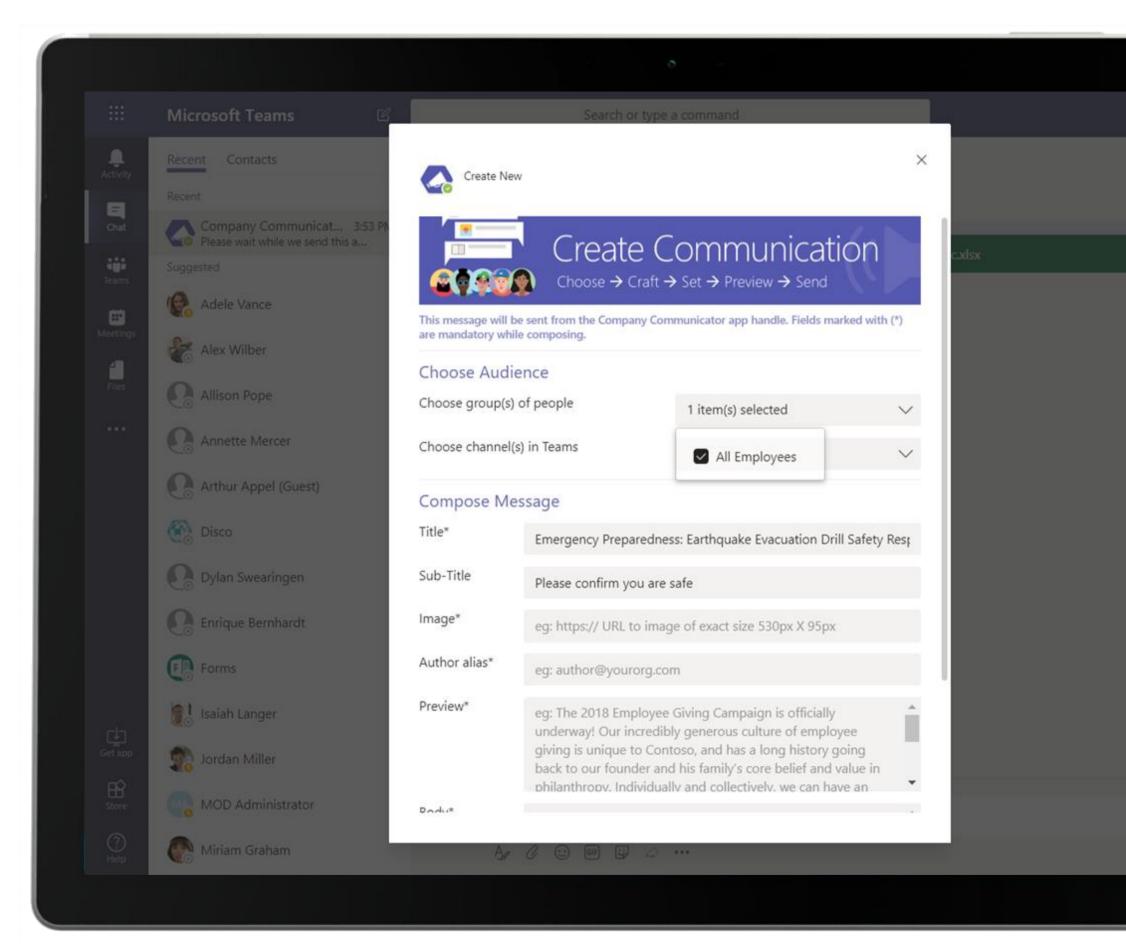




Get messages out to an employee or a set of employees in one or more team channels or individually.



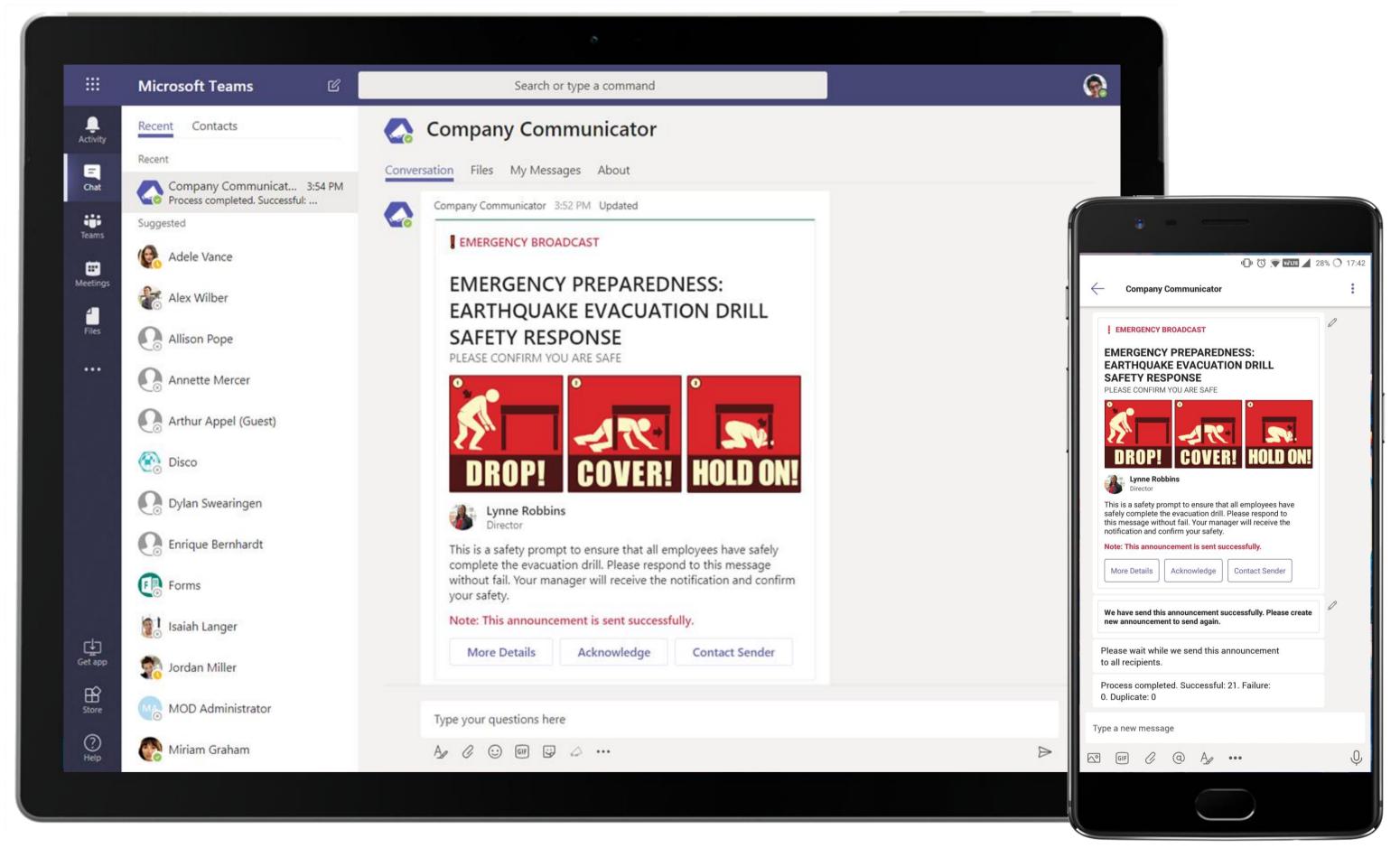
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Reach your employees where they collaborate! The Company Communicator app arms your Microsoft Teams environment with corporate communication and group broadcast capabilities.



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P	Preview* eg: The 2018 Employee Giving Campaign is official Our incredibly generous culture of employee giving Contoso, and has a long history going back to our fe					



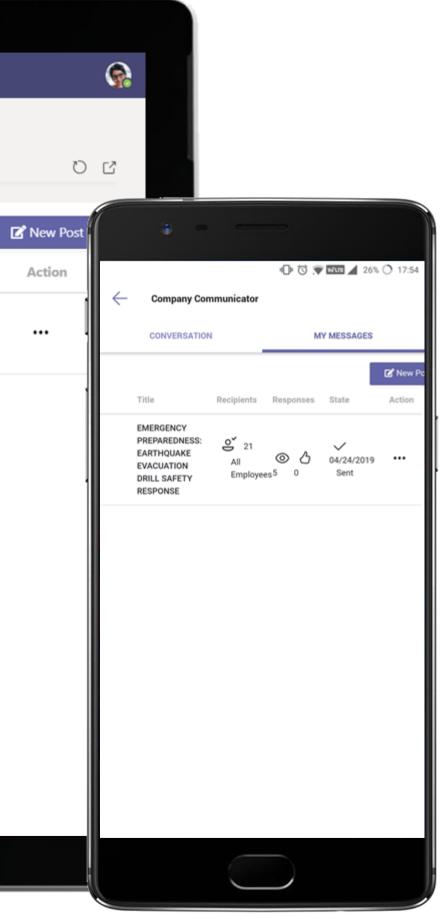
The creators can define user groups, compose a rich message, send or schedule messages, deliver to one or more employees.

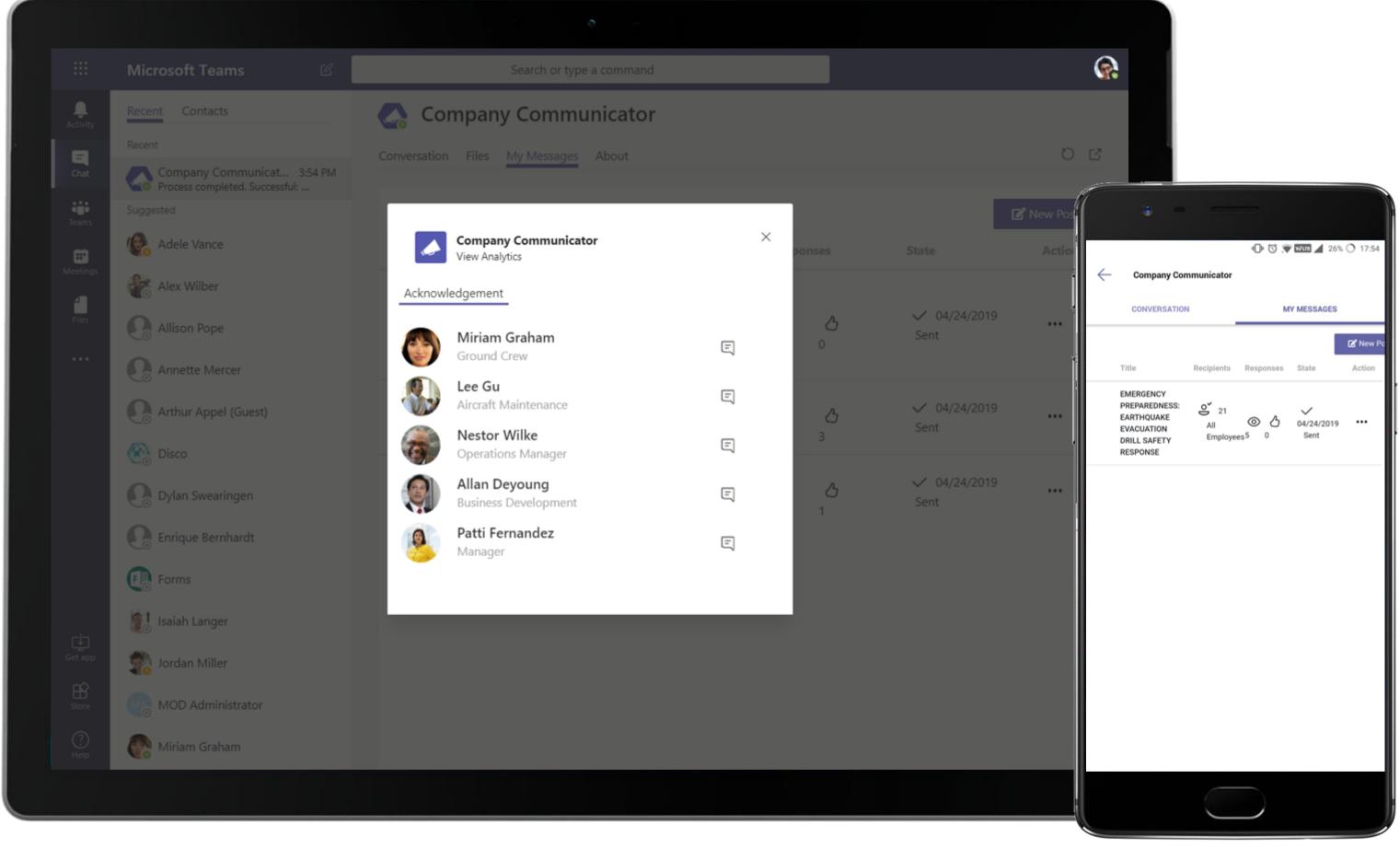


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Track read acknowledgement and view engagement analytics for each message sent seamlessly in a single app.

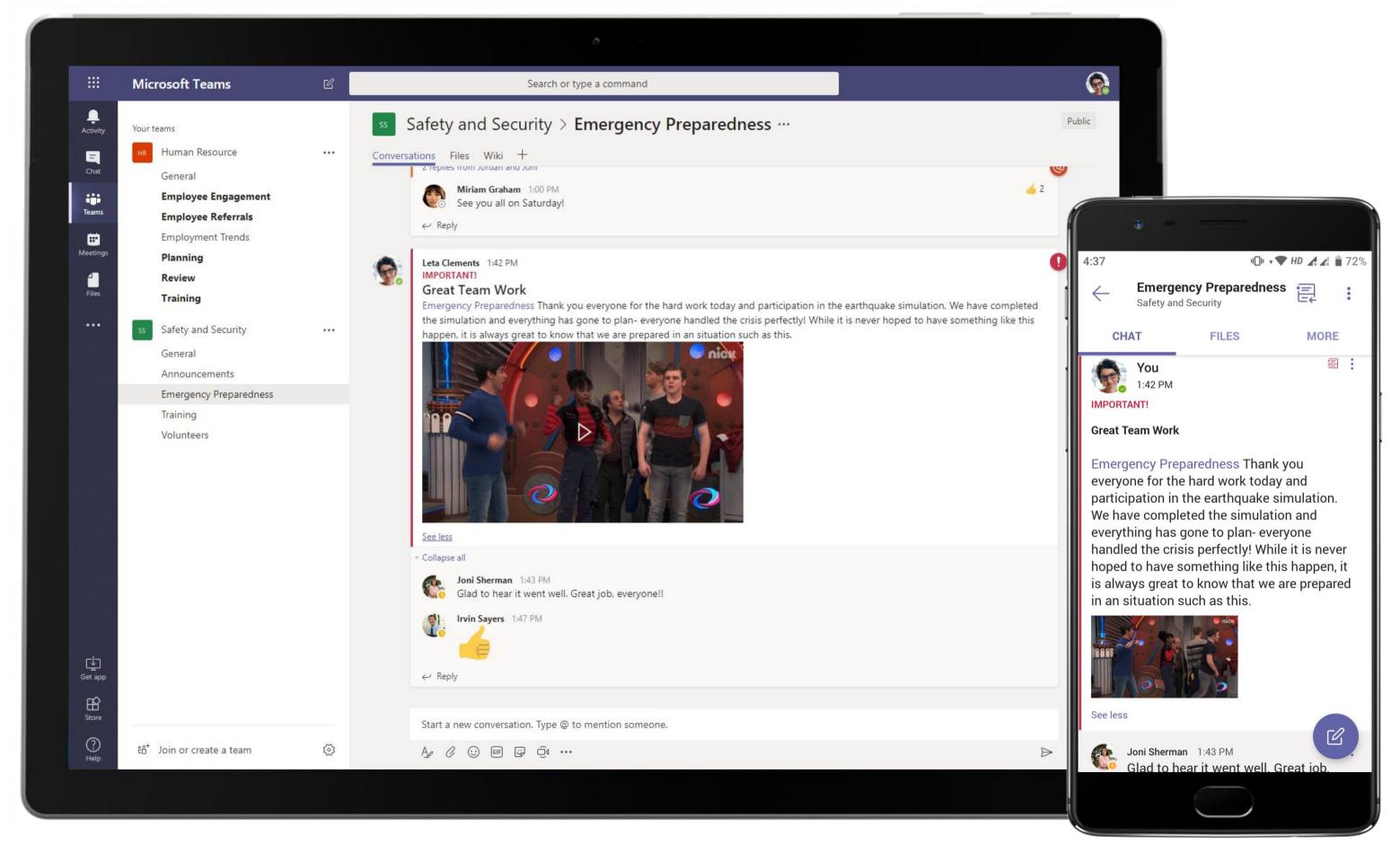






Track read acknowledgement and view engagement analytics for each message sent seamlessly in a single app.





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.





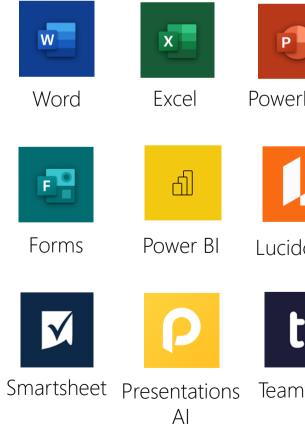
Human Resources

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 ٠
- 1:1 and group chats conversations the way you want •
- Real-time, contextual file sharing and co-authoring ٠
- Channel Tabs for everyone to stay updated ٠
- Real-time monitoring of external data/content ٠







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rPoint	OneNote	Asana	monday.com
		U	Μ
dchart	Trello	Shifts	MURAL
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nwork	Adobe Sign	Tasks by Planner and To Do	Communities

Meet the Business Decision Makers Human Resources



"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

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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

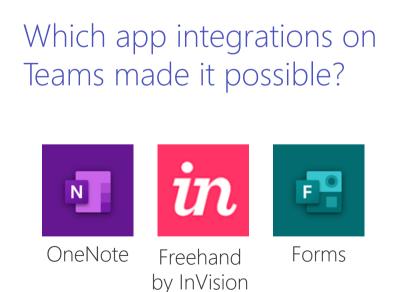
When employee morale is at risk due to baseless rumors of the Contoso closing its business, the HR Manager relies on Microsoft Teams to effortlessly connect and communicate with employees to ease their concerns and foster a strong workplace community.

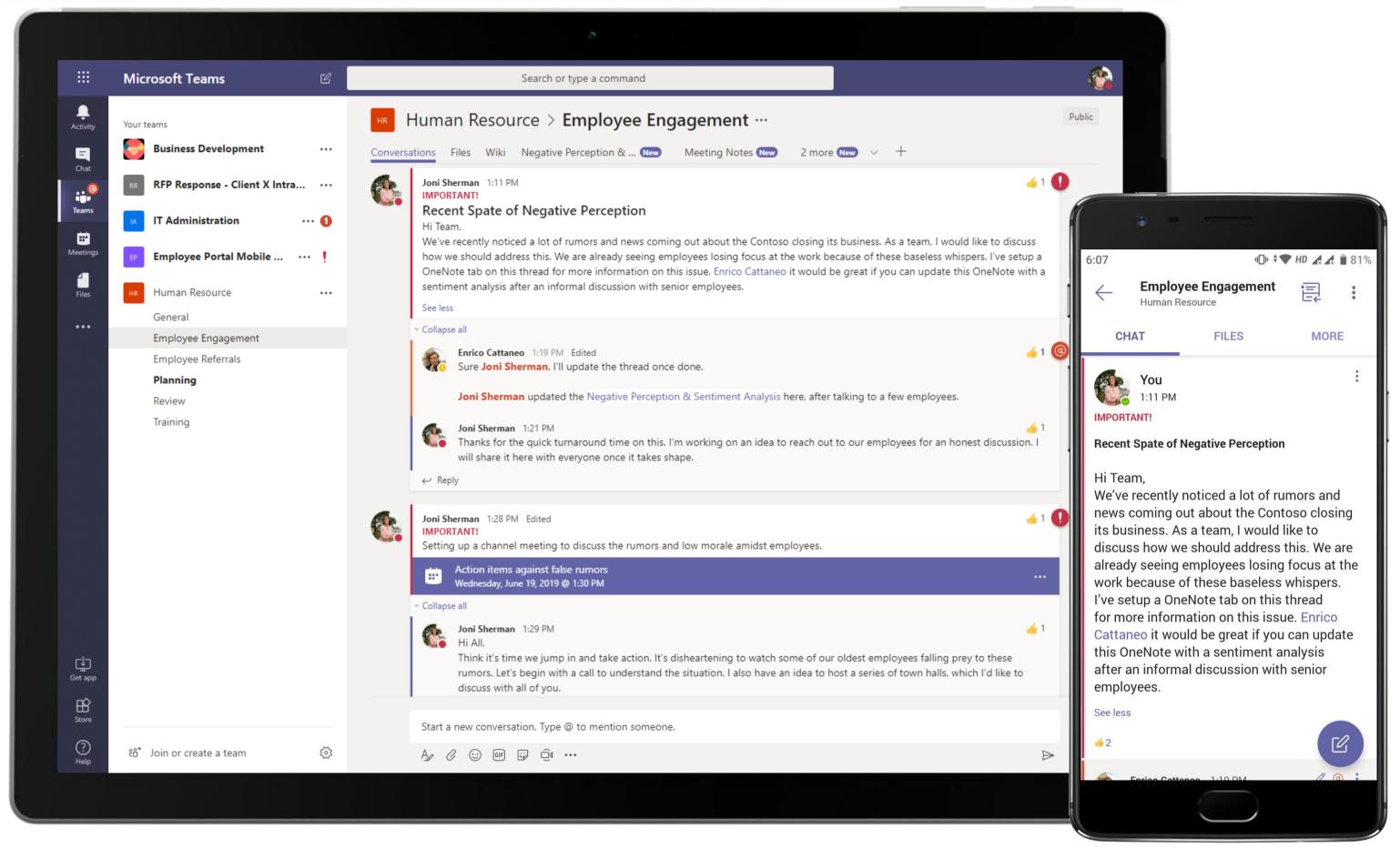
- Engages team member to gather organizational negative perceptions in a OneNote channel tab.
- Sets up a channel meeting to show team members the articles and news online that have fueled the rumors.
- Uses Freehand by InVision app to brainstorm a solution with her team to lower employee attrition and 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.







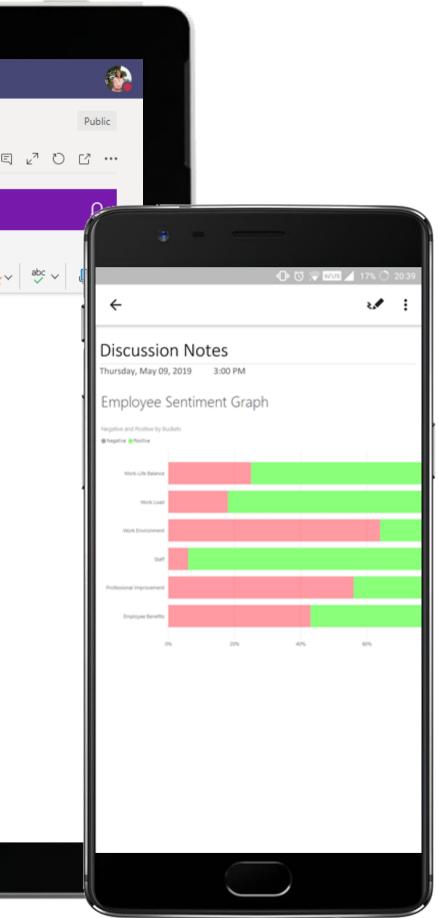
Get started with conversations to gain your team's perspective on trends you see within the organization. Microsoft Teams provides both a communication platform as well as a community to engage and talk to employees.



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E Chat	Business Development	Conversations Files Wiki Negative Perception & Sentim V Meeting Notes New 2 more New V +
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	Employee Engagement	
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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.

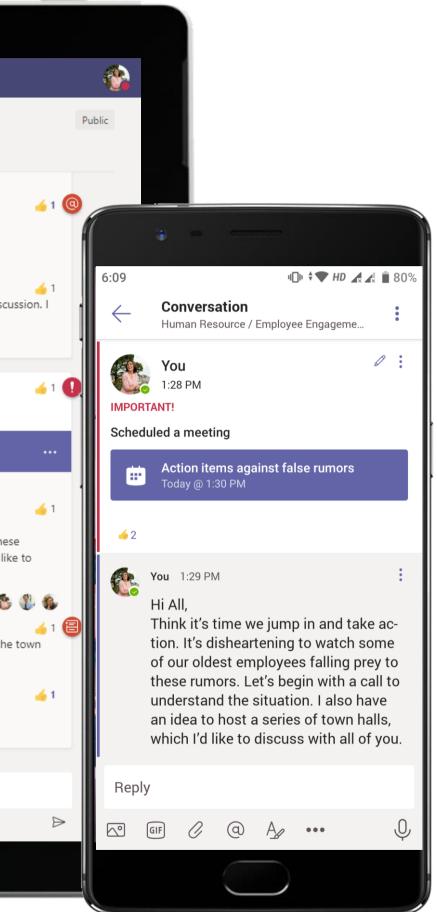




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Chat Chat Teams Meetings Files	RR RFP Response - Client X Intra ···· IA IT Administration ···· IF Employee Portal Mobile ···· HR Human Resource ···· General Freedowse Freedowset	 Collapse all Enrico Cattaneo 1:19 PM Edited Sure Joni Sherman. I'll update the thread once done. Joni Sherman updated the Negative Perception & Sentiment Analysis here, after talking to a few employees. Joni Sherman 1:21 PM Thanks for the quick turnaround time on this. I'm working on an idea to reach out to our employees for an honest discussion will share it here with everyone once it takes shape. <i>Collapse all</i>
	Employee Engagement Employee Referrals Planning Review Training	Joni Sherman 1:28 PM Edited IMPORTANT! Setting up a channel meeting to discuss the rumors and low morale amidst employees. Image: Comparison of the state of the
		 Collapse all Joni Sherman 1:29 PM Hi All, Think it's time we jump in and take action. It's disheartening to watch some of our oldest employees falling prey to the rumors. Let's begin with a call to understand the situation. I also have an idea to host a series of town halls, which I'd like discuss with all of you.
		Image: Action items against false rumors ended: 2m 54s Image: Action items against false rumors ended: 2m 54s
↓ Get app		Enrico Cattaneo 1:44 PM The town hall is an excellent idea, can't wait to see the response for it! ← Reply
Store		Start a new conversation. Type @ to mention someone.
(?) Help	ింin or create a team ర్రి	

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.

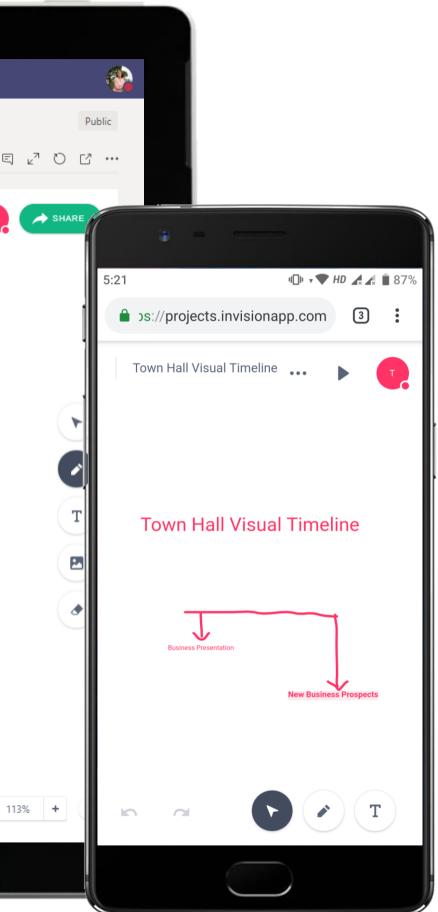


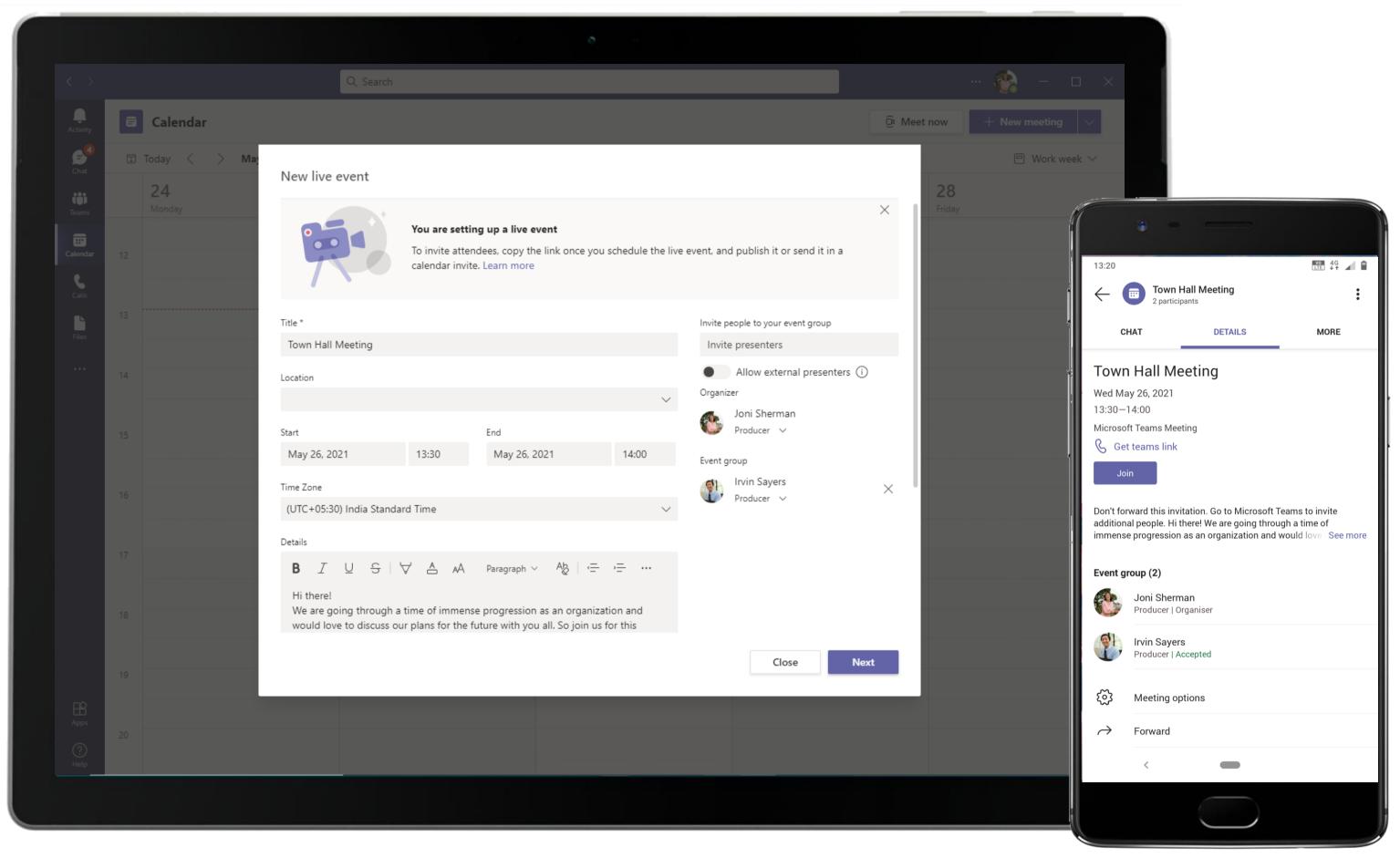


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Collaborate, ideate and draft solutions on an infinite white boarding space with the Freehand by InVision app in Teams. The HR Manager uses the app to visualize a town hall schedule with her team.



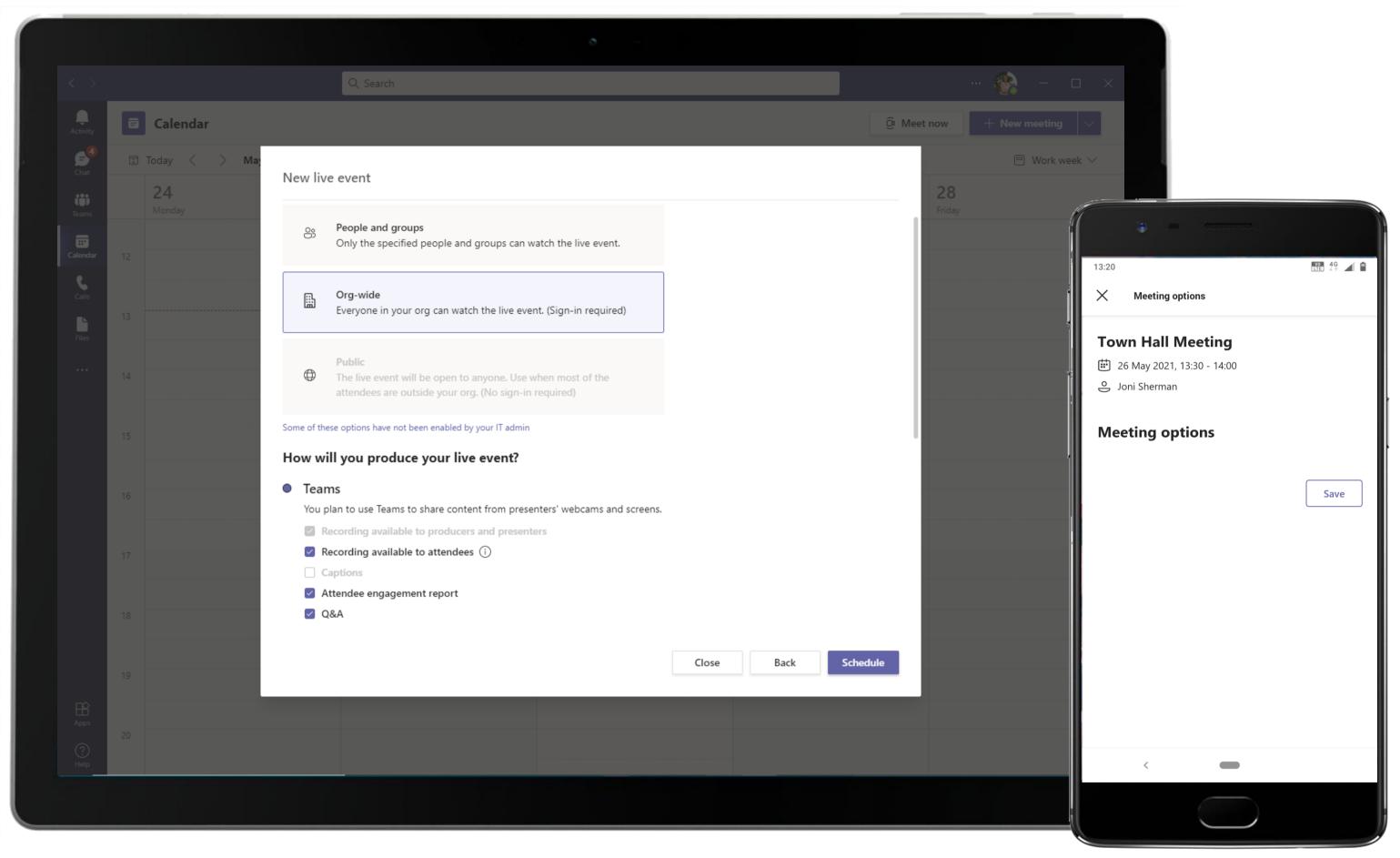




Microsoft Teams live events are an extension of Teams meetings that enable you to schedule and produce events that stream to large online audiences. The HR Manager uses the live events feature to schedule an event.

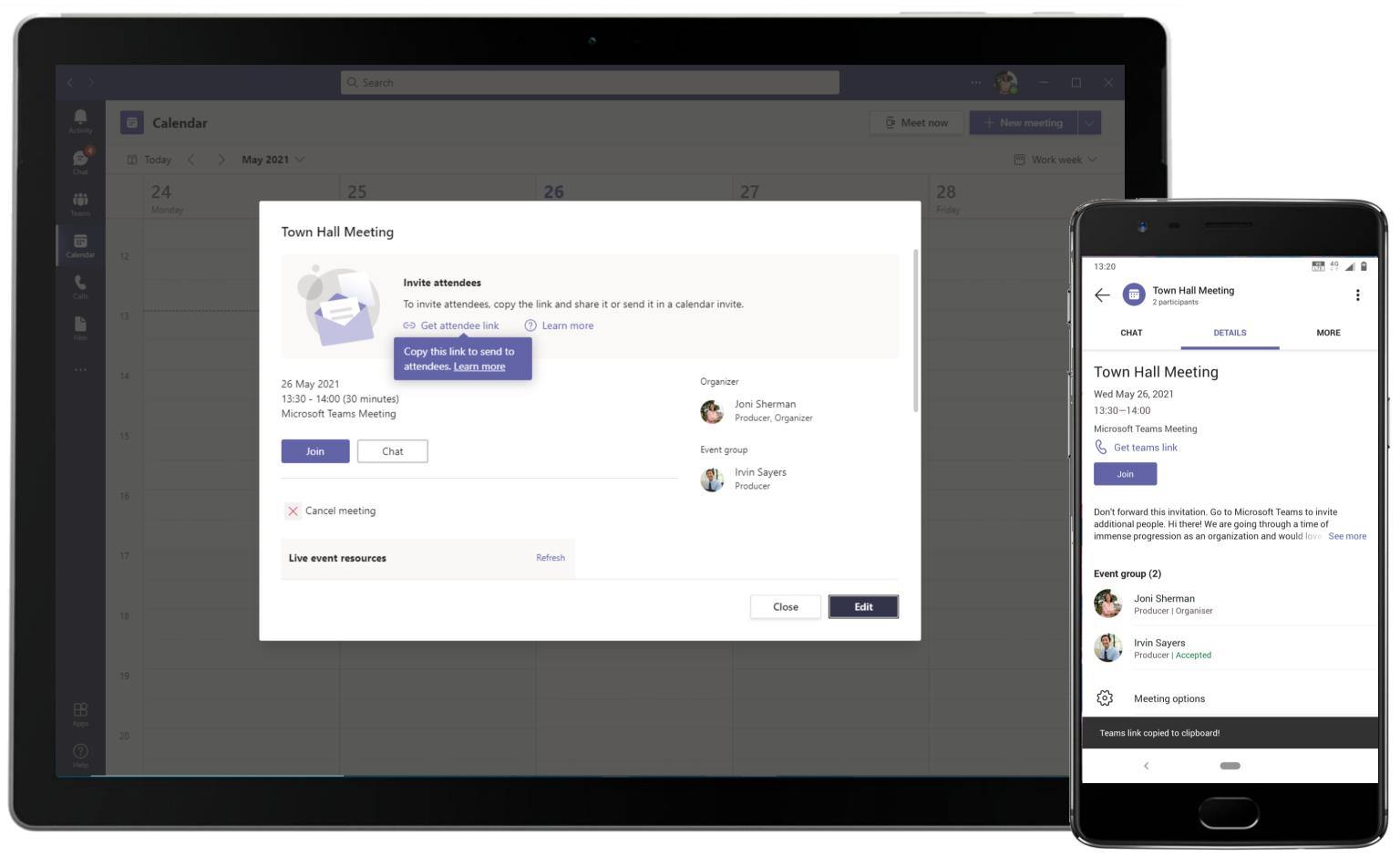


Human Resource - Strengthening the Workplace Community



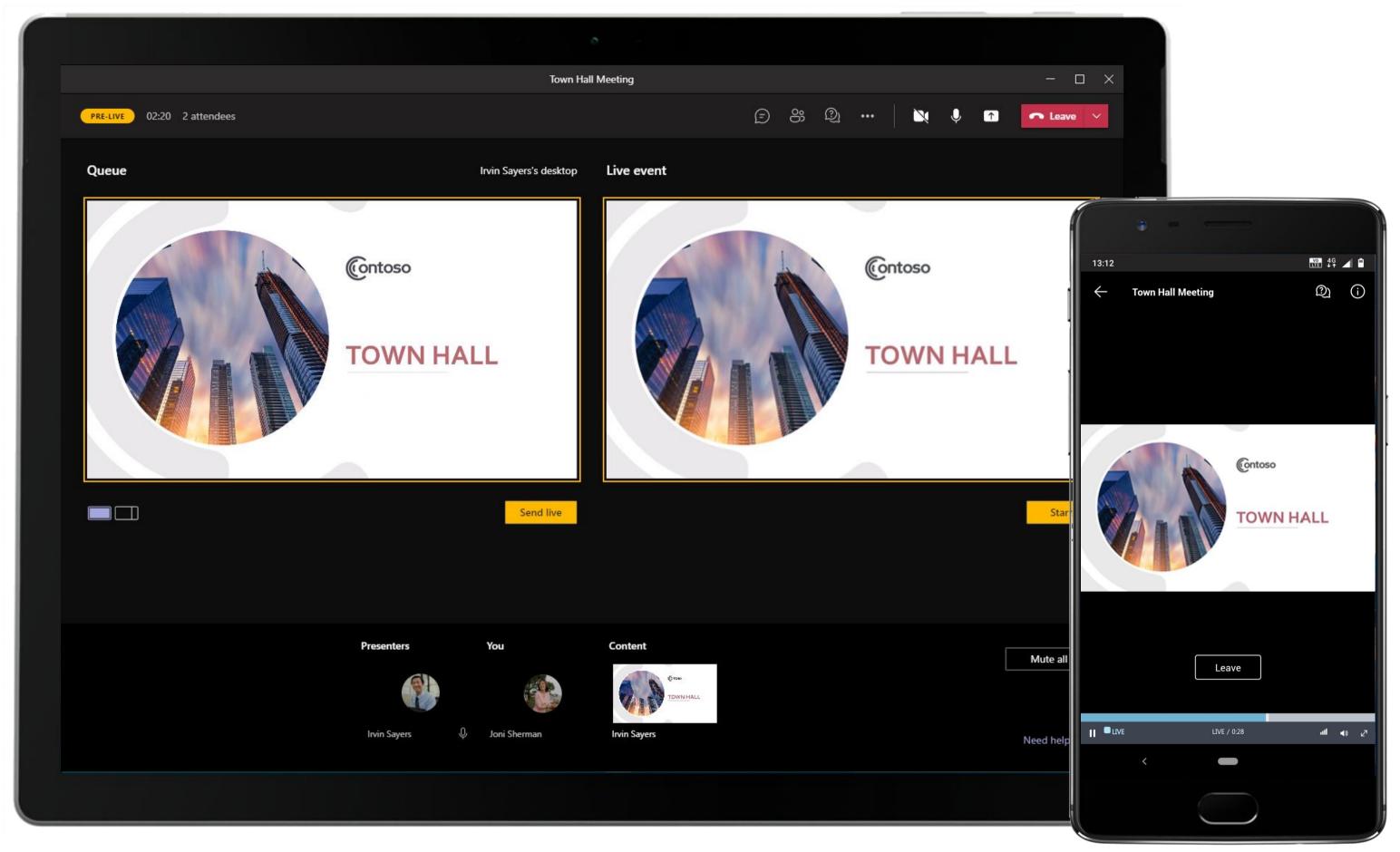
Microsoft Teams is a great way to schedule meetings and live events, especially if the participants don't all work in the same geographic area. It seamlessly integrates scheduling, invitations, updates and access to virtual meetings.





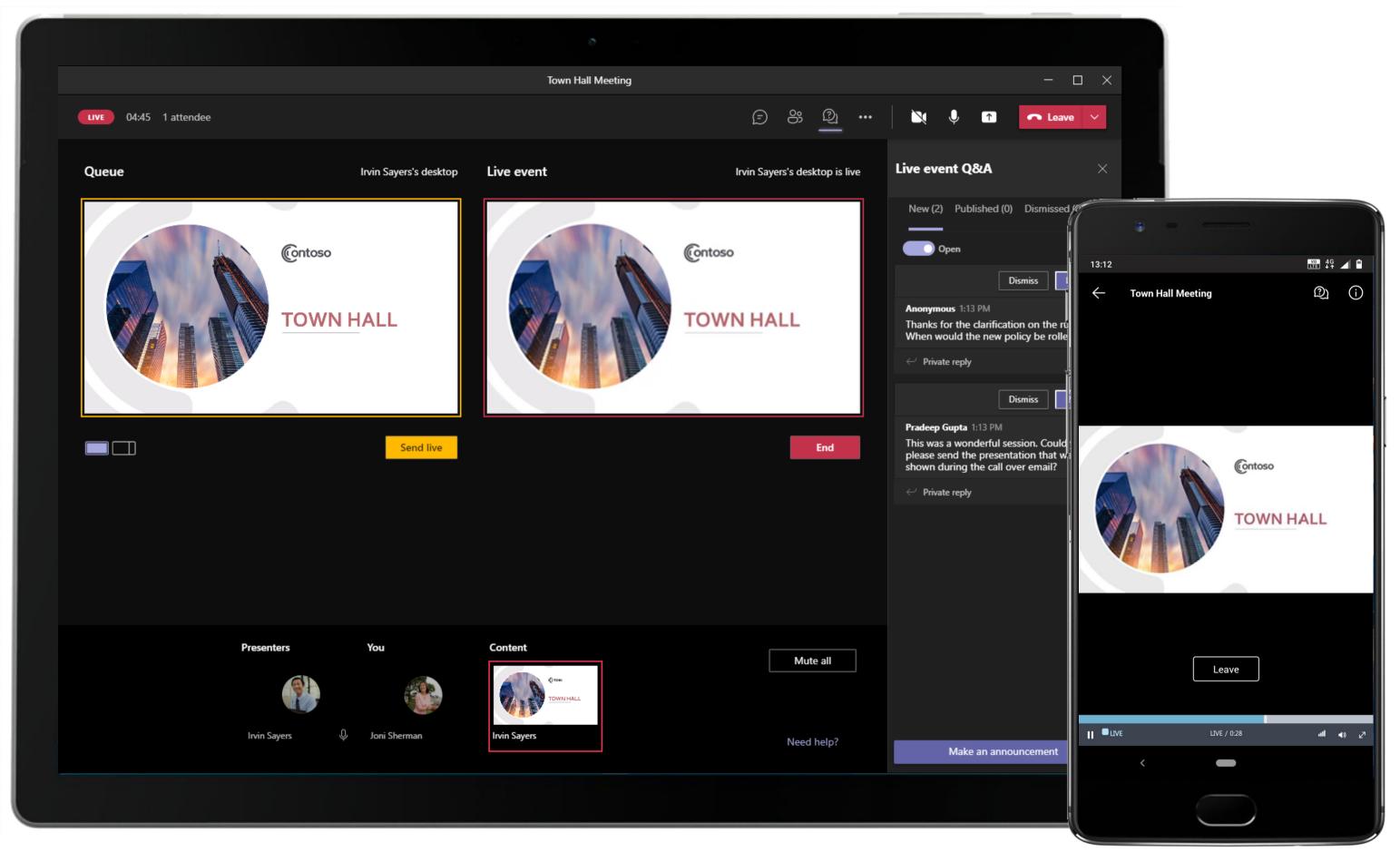
With Teams live events, you can broadcast video and meeting content to large online audiences. The host copies the link and sends it to attendees.





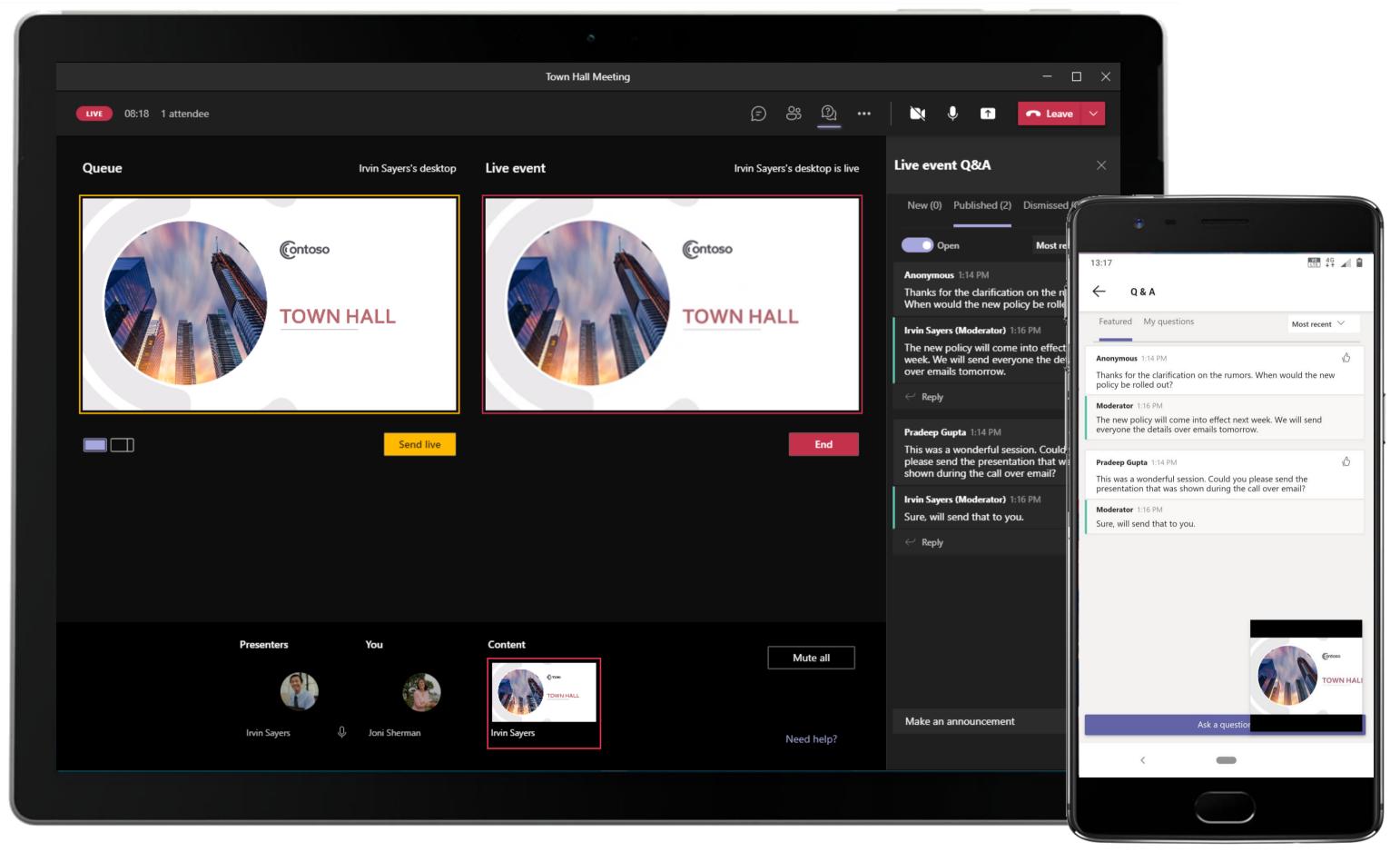
Event organizers can choose to share their screen, present documents, share videos, images and more for an engaging live event.





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.

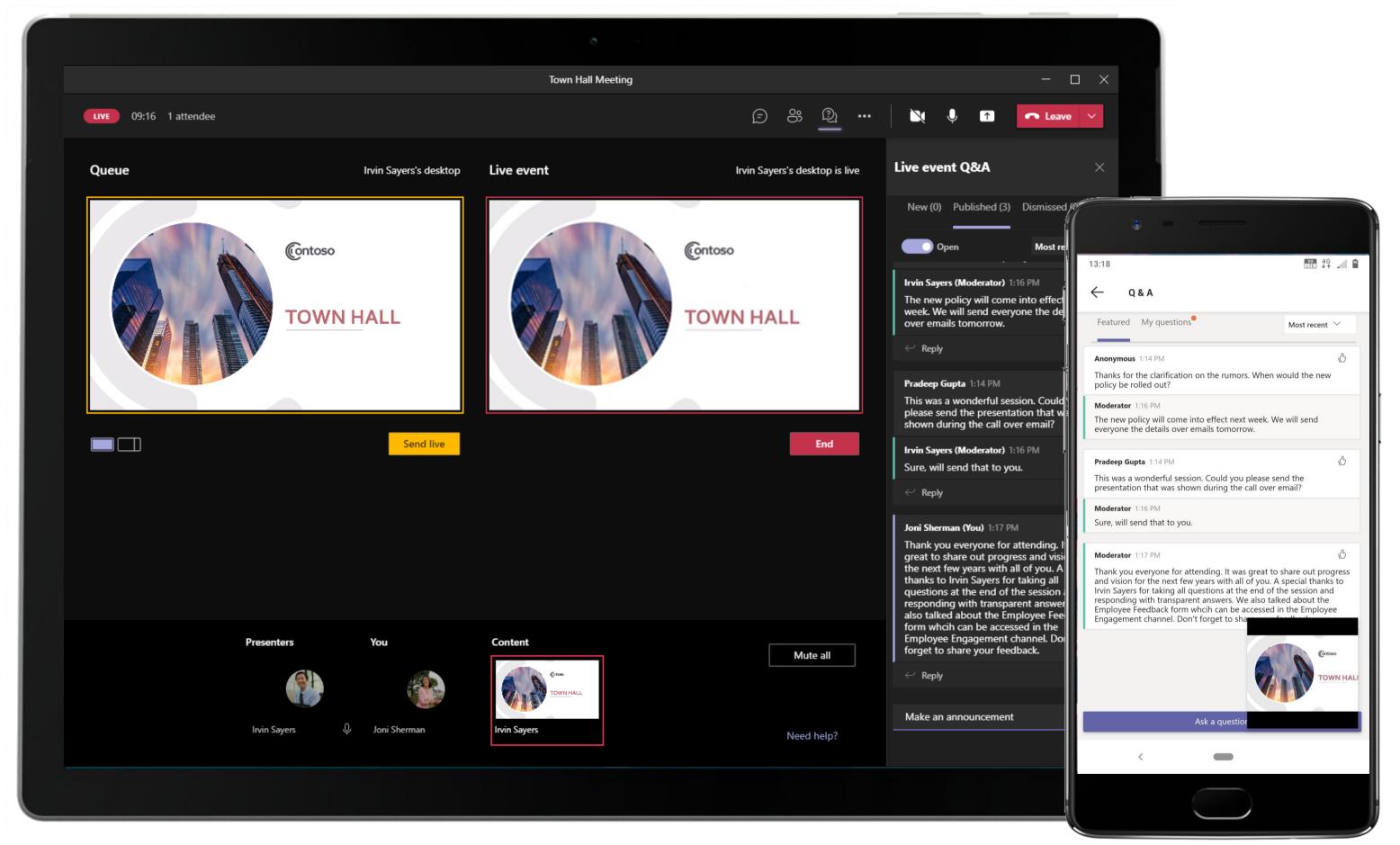




Event producers can respond to audience questions, make announcements and engage their meeting attendees without disturbing the presenter.



Human Resource - Strengthening the Workplace Community



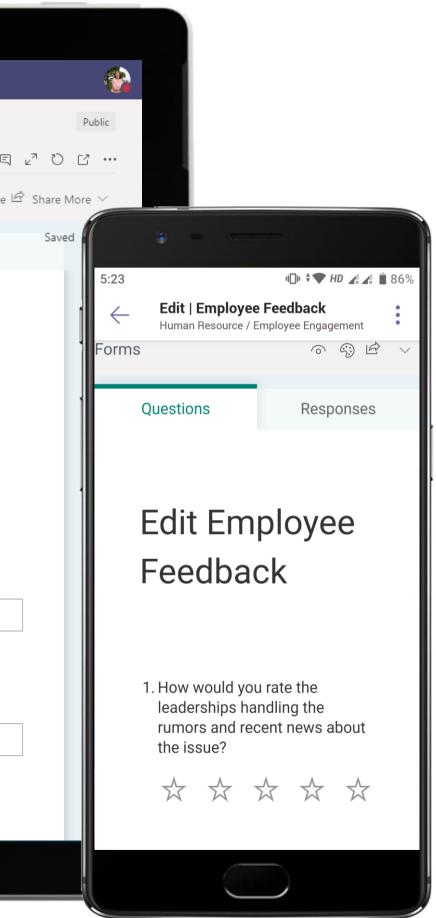
Live events in Teams empower multiple roles (organizer, producer, presenter, and attendee) to successfully broadcast a message in an event. The HR Manager requests the attendees to provide feedback.



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Teams	IT Administration 1		-
	Employee Portal Mobile •••• !	Questions	Responses
files	HR Human Resource		
	General Employee Engagement Employee Referrals Planning	Edit Employee Feedback	
	Review Training	1. How would you rate the leaderships handling the rumors and rec \bigstar	ent news about the issue?
		2. Do you have any open suggestions on how we can make work a	nd life balance better?
		Enter your answer	
Get app		3. What questions or concerns do you have for Leadership?	
Store			
? Help	ిం ⁺ Join or create a team 🔅	4. Are there any other areas of concern that you would like discuss	with us?

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?



Freehand by InVision

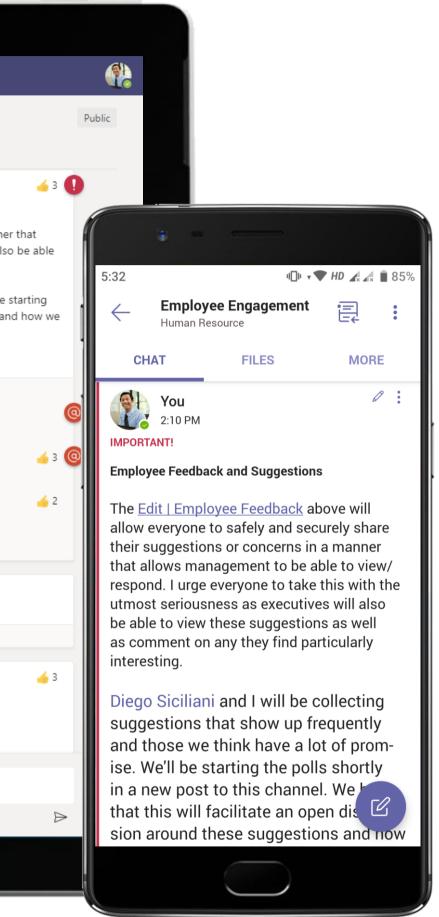


Pollv

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	 Northwind Website Update Northwest Experience Desig Contoso Company West Regi Human Resources 	••••	 Collapse all Enrico Cattaneo 2:11 PM What a great idea Irvin Sayers! What a great idea Irvin Sayers! Christie Cline 2:12 PM This is awesome, I've just added my suggestions! I'm really looking forward to this Irvin Sayers! Irvin Sayers 2:16 PM Thanks, you two! Ideas that gain a lot of traction will be listed out in the OneNote tab Ideas Crowd Sourced here.
			Irvin Sayers 2:19 PM Polly "How many of you resonate with: Clearer communication from management?" "Upvote" "Downvote" ← Reply
Get app			Polly 2:19 PM Irvin Sayers created a poll! Votes are visible to everyone.
Store	ిం ⁺ Join or create a team	53	Start a new conversation. Type @ to mention someone. A C C G I I I I I I I I I I I I I I I I I

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.

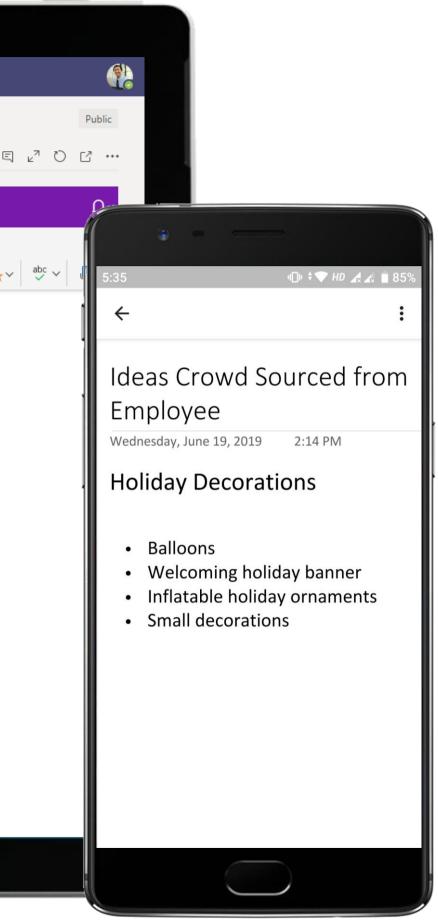




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Get app Get app Store Help	සී ⁺ Join or create a team	

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.

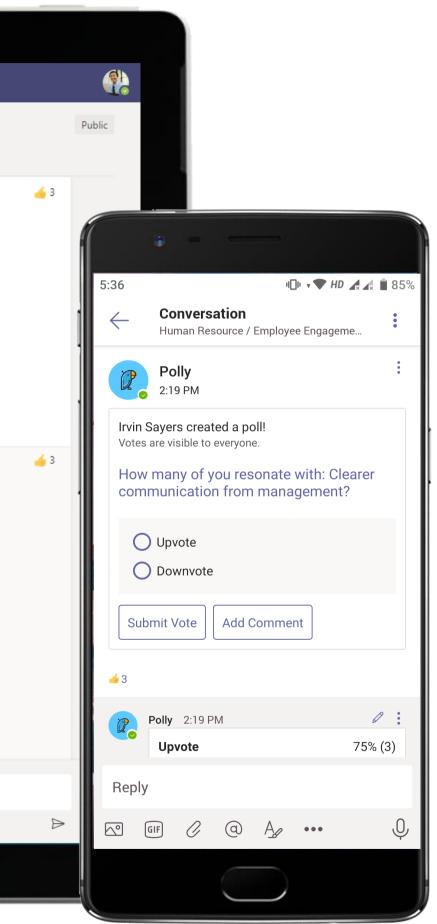


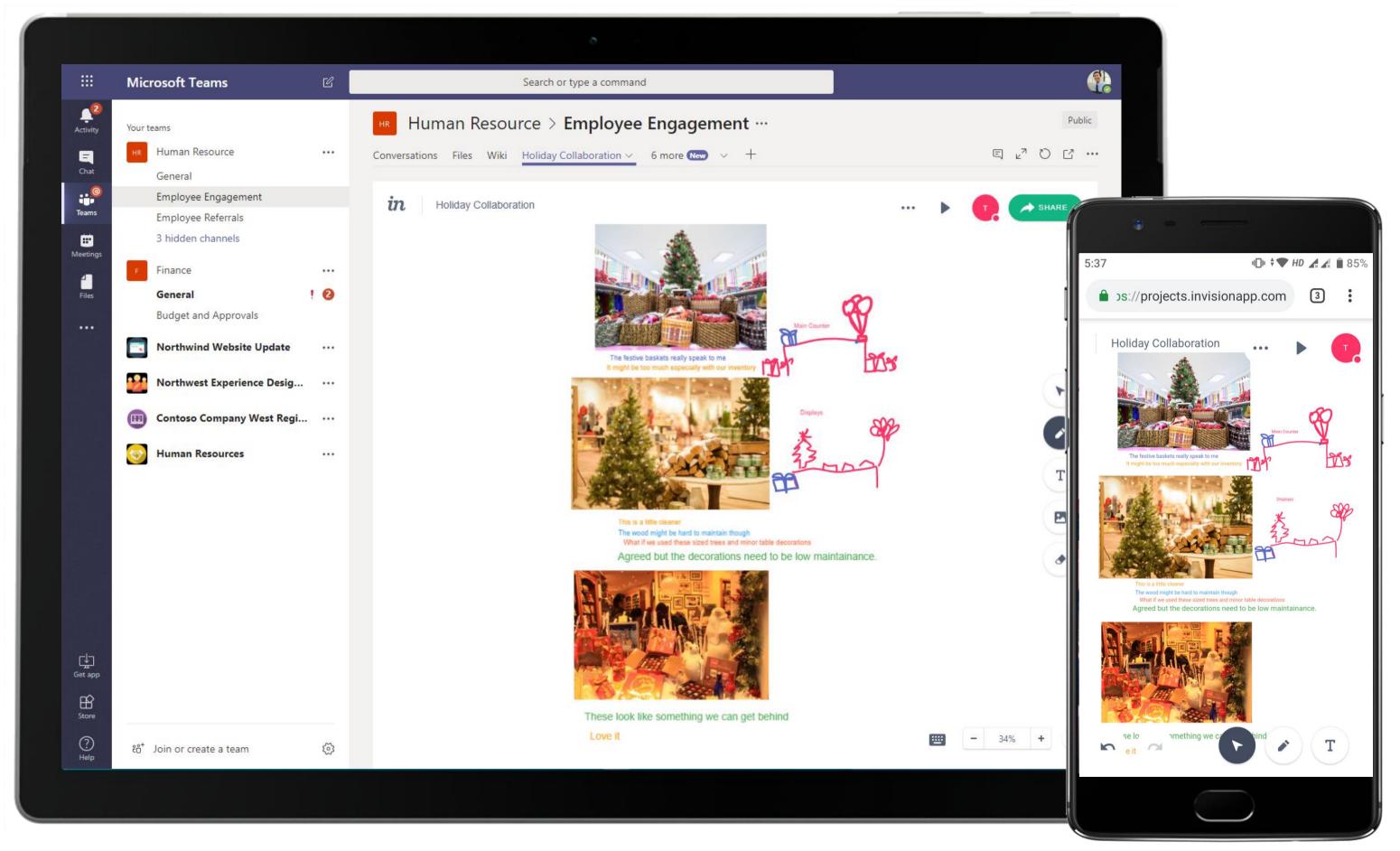


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Teams	Employee Referrals		Irvin Sayers created a poll! Votes are visible to everyone.
	3 hidden channels		How many of you resonate with: Clearer
Files	General	! 2	communication from management?
	Budget and Approvals		O Upvote
	Northwind Website Update		O Downvote
	Northwest Experience Desig.		Submit Vote Add Comment
	回 Contoso Company West Regi		Polly 2:19 PM Updated
	😔 Human Resources		Upvote 75% (3)
			Irvin Sayers, Enrico Cattaneo, Joni Sherman
			Downvote 25% (1)
			Christie Cline
			Total Votes 4
			Christie Cline Great question! This is really important to me!
¢			View in Tab
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Store			Start a new conversation. Type @ to mention someone.
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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. ٠
- 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. ٠
- 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

Hibob

Teams made it possible?

X

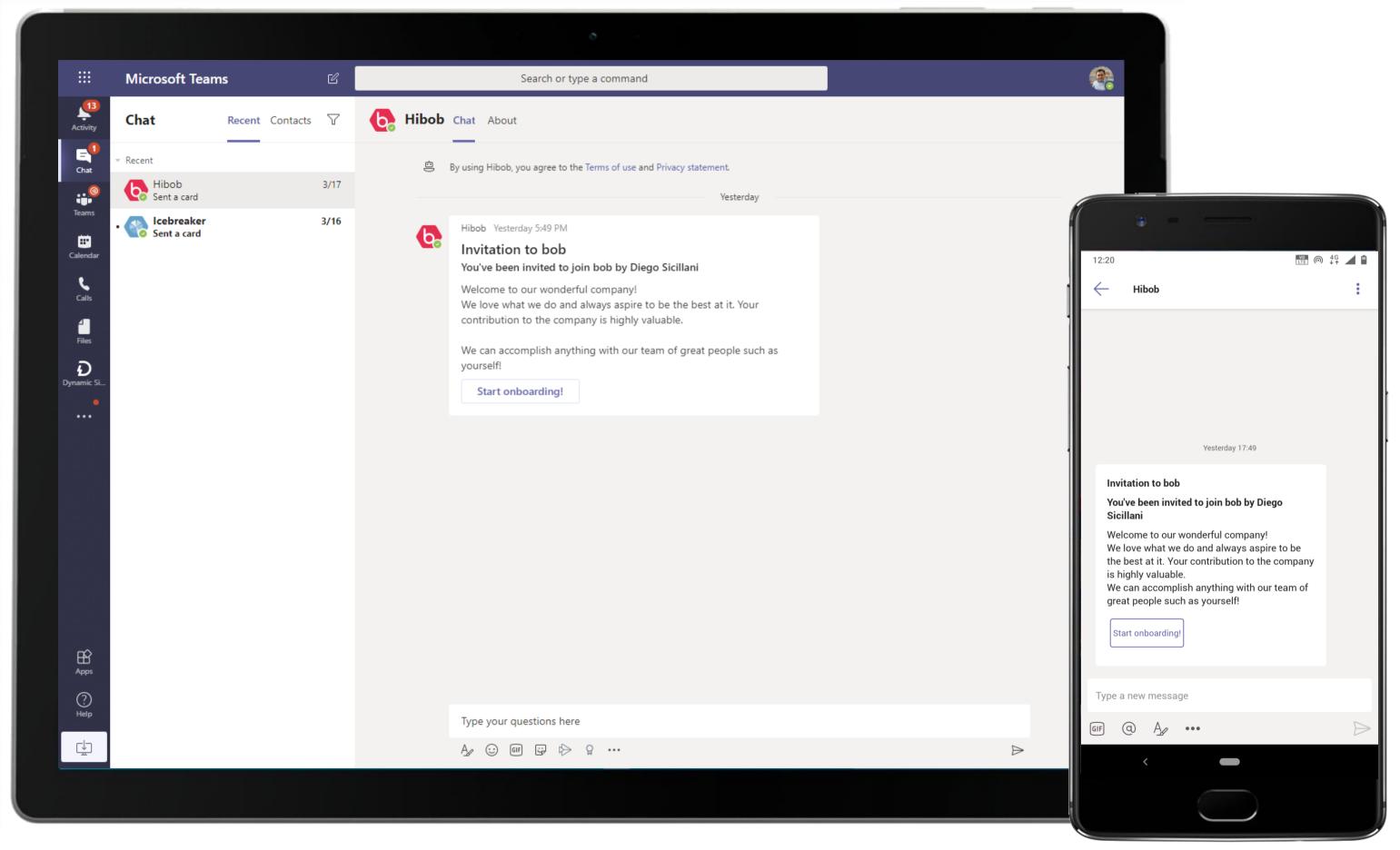
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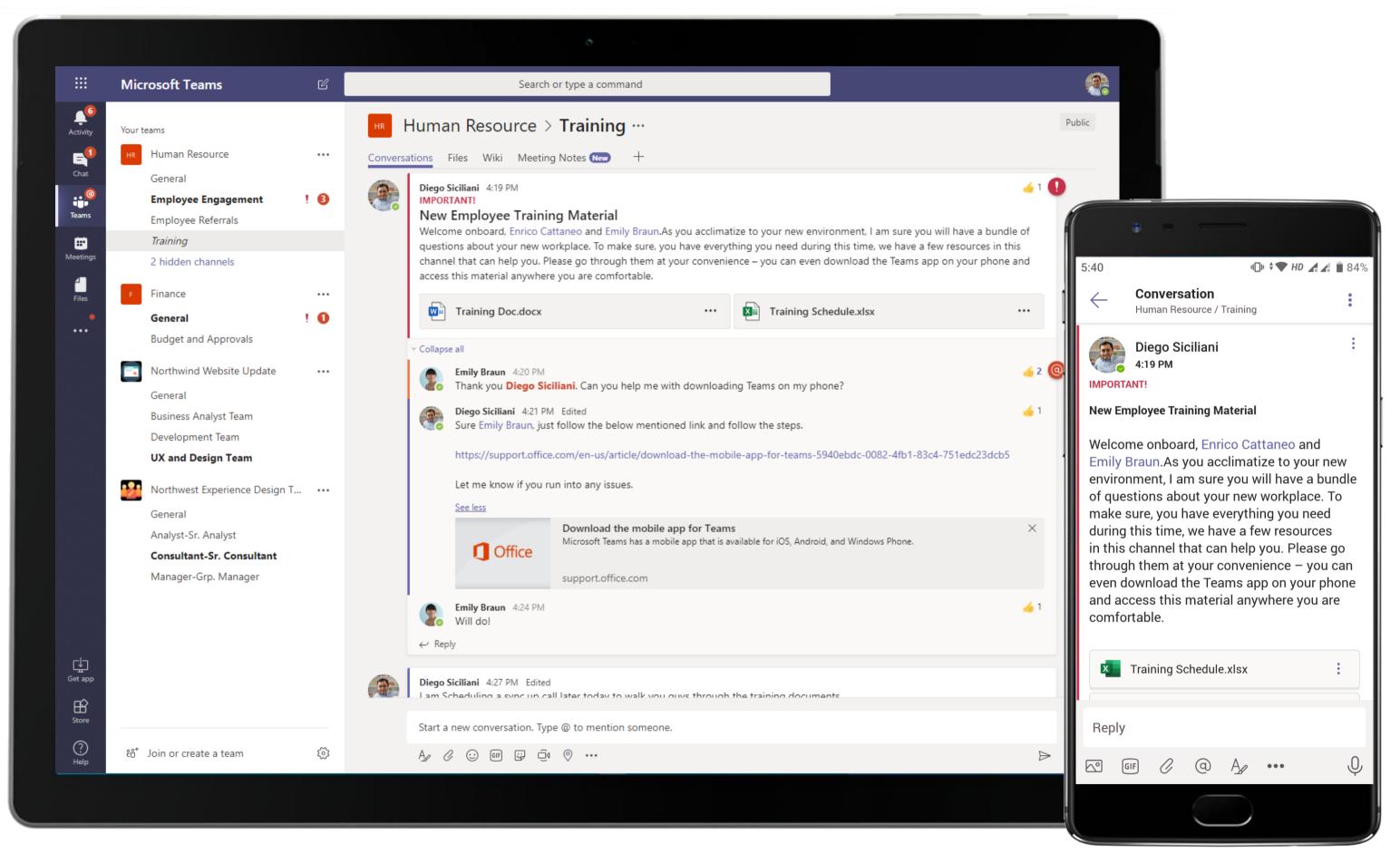
Dynamic

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.

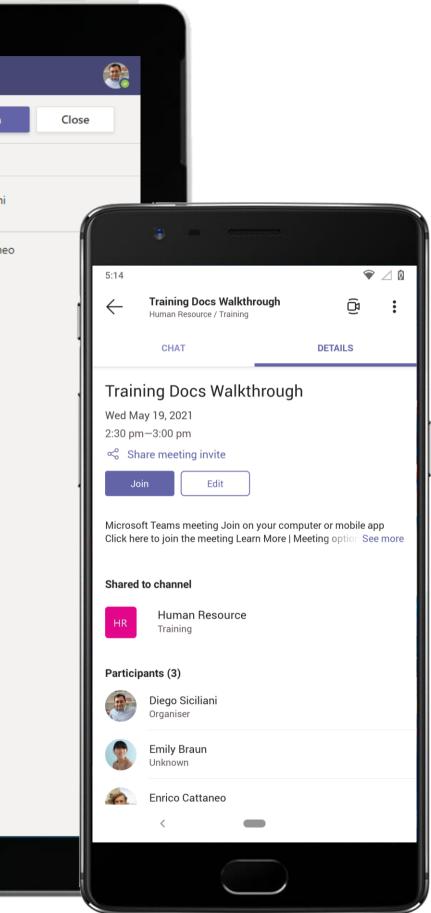


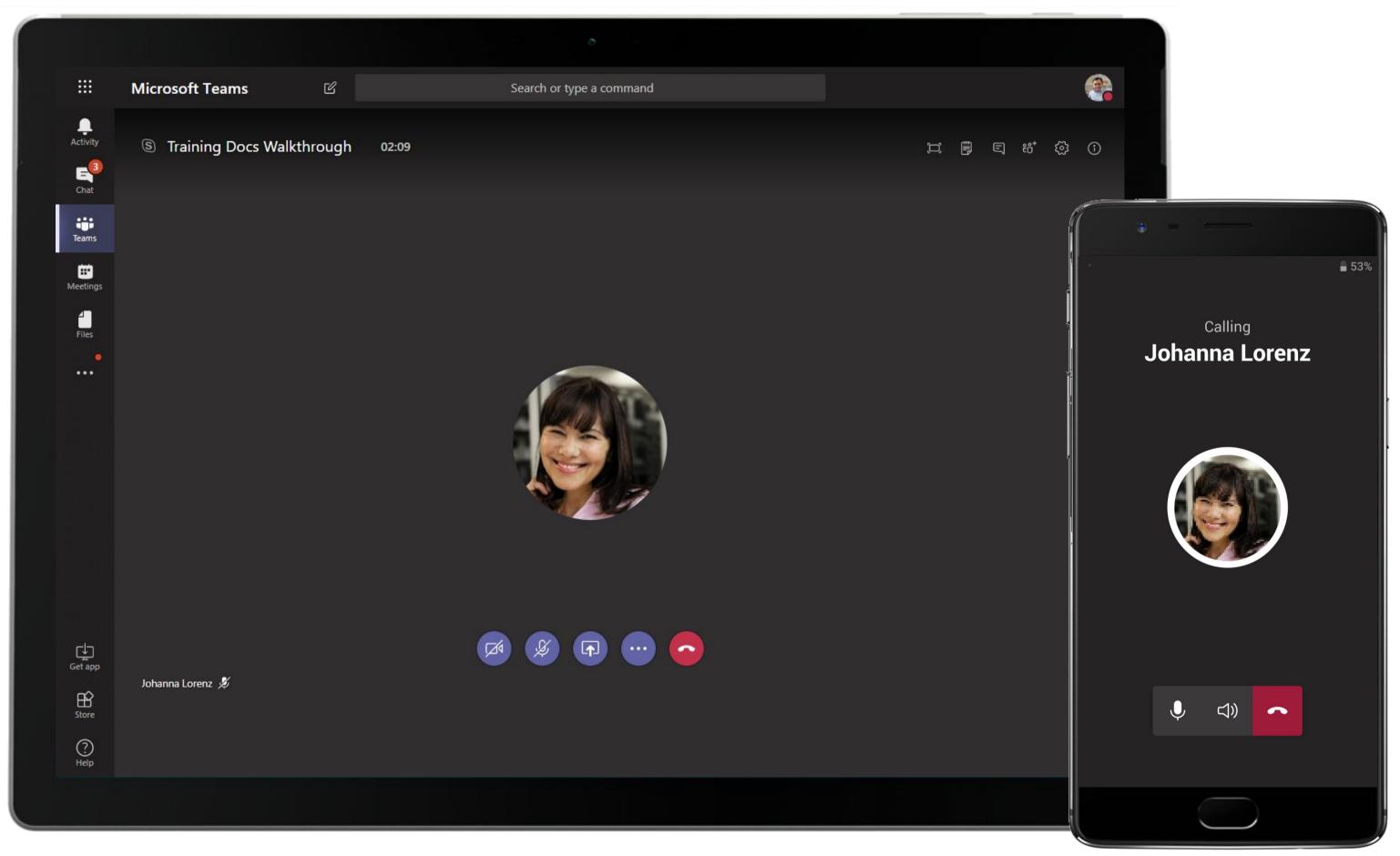
Human Resource - New Employee Training

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		Join on your computer or mobile app	
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Apps			
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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.







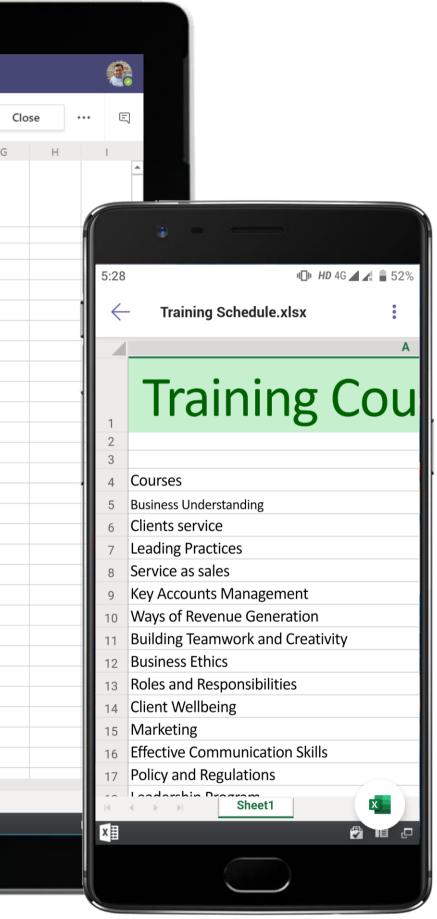
During a meeting, participants can use rich meeting capabilities such as video, screen sharing, file sharing, meeting notes and chat to make the meeting engaging and productive. Needless to say, meetings are fully supported on mobile clients too!



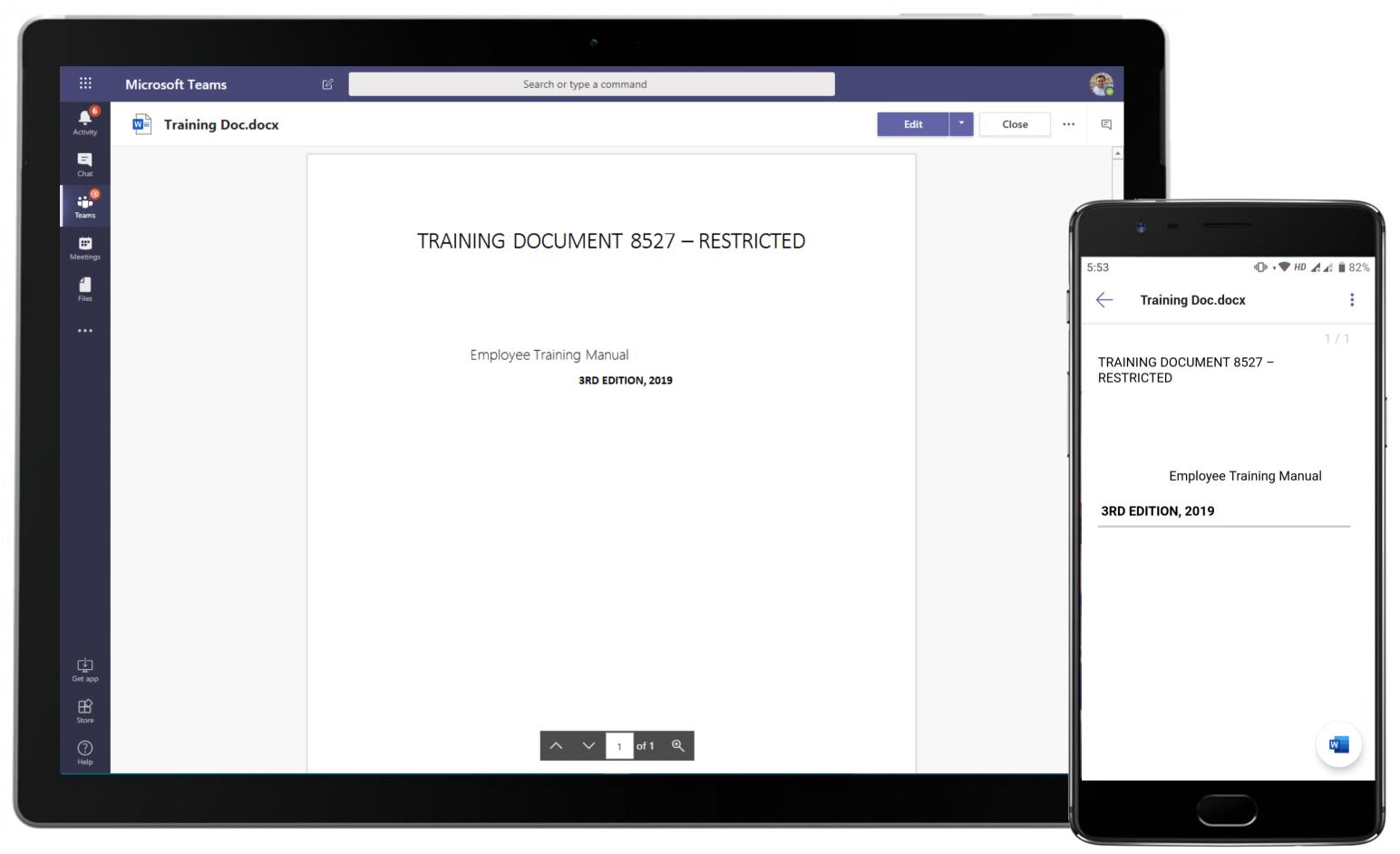
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Files	6	Clients service	Classroom, 3 hours				
	7	Leading Practices	Classroom, 5 hours				
	8	Service as sales	Classroom, 2 hours				
	9	Key Accounts Management	Classroom, 4 hours				
	10	Ways of Revenue Generation	Classroom, 4 hours				
	11	Building Teamwork and Creativity	Classroom, 1 hour				
	12	Business Ethics	Classroom, 3 hours				
	13	Roles and Responsibilities	Classroom, 3 hours				
	14	Client Wellbeing	Classroom, 3 hours				
	15	Marketing	Classroom, 5 hours				
	16	Effective Communication Skills	Classroom, 3 hours				
	17	Policy and Regulations	Classroom, 3 hours				
	18	Leadership Program	Classroom, 5 hours				
	19	Awareness Workshop	Classroom, 2 hours				
	20	Frontline Duties	Classroom, 3 hours				
	21	Alliances and Partnerships	Classroom, 5 hours				
	22	Revenue Management	Classroom, 4 hours				
	23	Experts Training on Personality Development	Classroom, 3 hours				
	24	Managing Oneself and the Team	Classroom, 4 hours				
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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.





Human Resource - New Employee Training



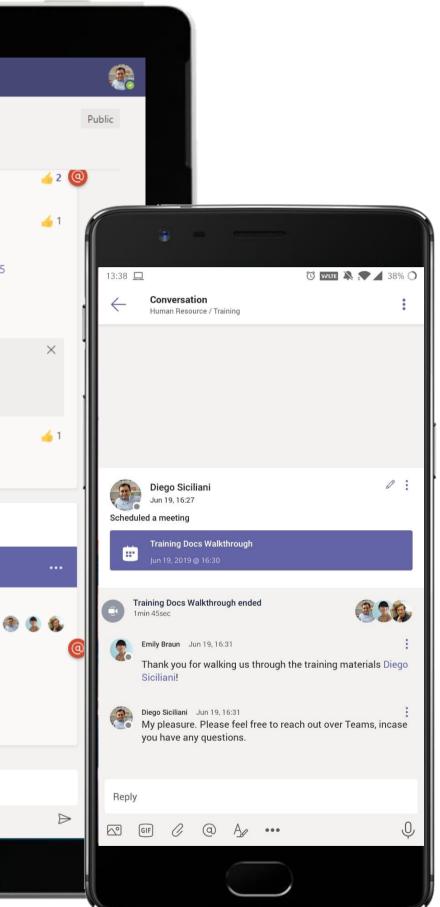
Screen sharing lets you present your screen during a meeting. You can choose to present your entire desktop, a specific application or a file. Here, the Training Manager presents a Word document to the new hires.

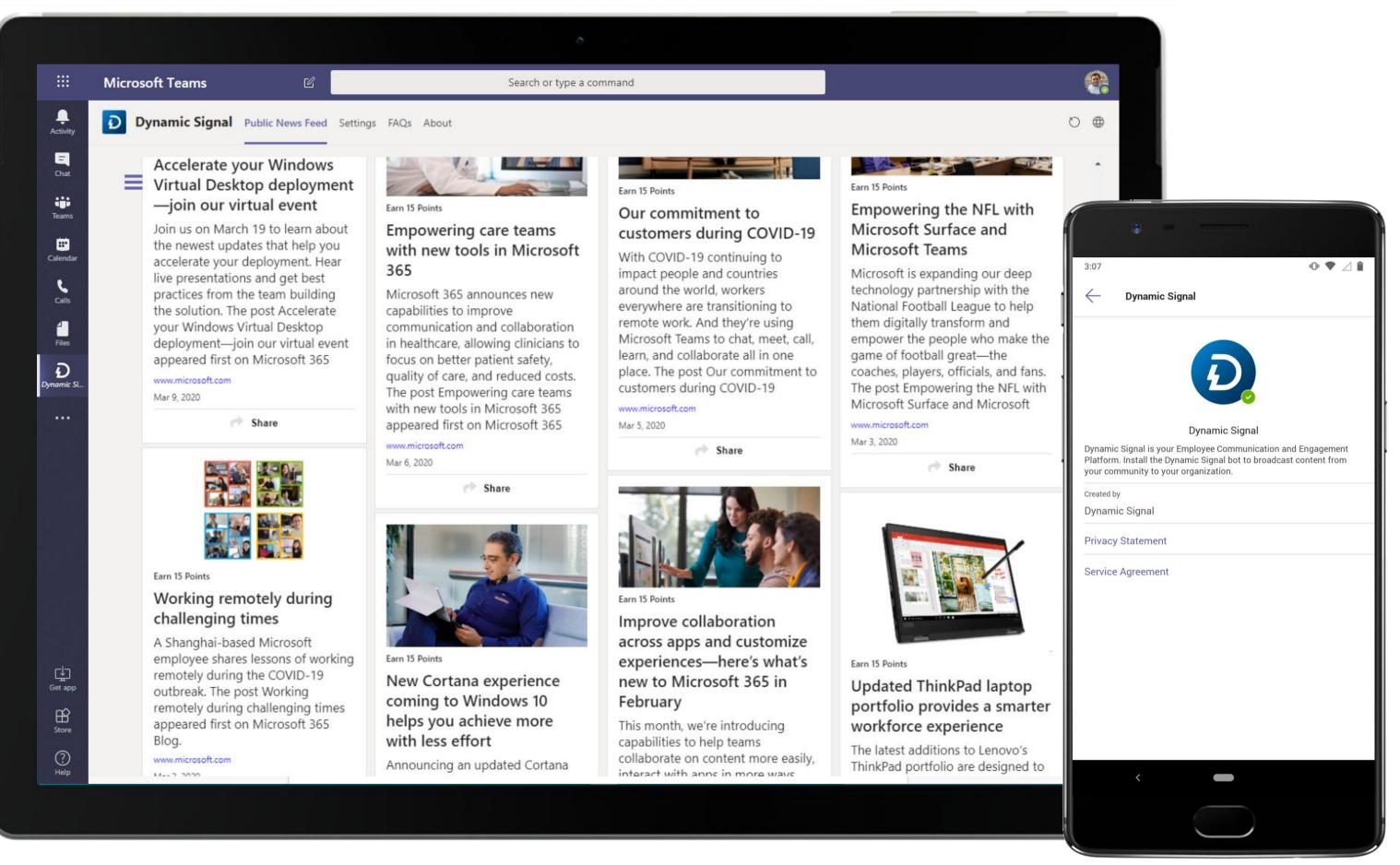


	Microsoft Teams	Ľ	Search or type a command
Activity	Your teams HR Human Resource		HR Human Resource > Training
Chat	General Employee Engagement		Conversations Files Wiki Meeting Notes + Emily Braun 6/19 4:20 PM Thank you Diego Siciliani. Can you help me with downloading Teams on my phone?
Teams 	Employee Referrals <i>Employment Trends</i> <i>Review</i>	0 2	Diego Siciliani 6/19 4:21 PM Edited Sure Emily Braun, just follow the below mentioned link and follow the steps. https://support.office.com/en-us/article/download-the-mobile-app-for-teams-5940ebdc-0082-4fb1-83c4-751edc23dcb5
Files	<i>Training</i> 1 hidden channel	-	Let me know if you run into any issues. See less
	F Finance General Budget and Approvals	 ! 0	Download the mobile app for Teams Microsoft Teams has a mobile app that is available for iOS, Android, and Windows Phone. support.office.com
	General Business Analyst Team		Emily Braun 6/19 4:24 PM Will do! ← Reply
	Development Team UX and Design Team		Diego Siciliani 6/19 4:27 PM Edited I am Scheduling a sync up call later today to walk you guys through the training documents.
	Northwest Experience Design T General		Training Docs Walkthrough Wednesday, June 19, 2019 @ 4:30 PM Collapse all
	Analyst-Sr. Analyst Consultant-Sr. Consultant Manager-Grp. Manager		Image: Constraining Docs Walkthrough ended: 1m 45s Image: Constrating ended: 1m 45s
Get app			Diego Siciliani 6/19 4:31 PM My pleasure. Please feel free to reach out over Teams, incase you have any questions. ← Reply
Store			Start a new conversation. Type @ to mention someone.
? Help	°° ⁺ Join or create a team	\$	

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.

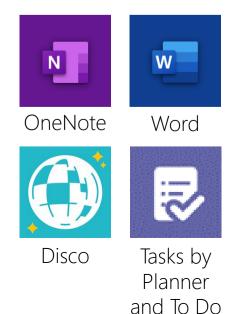
How did Teams help the Hiring and Training Manager execute his roles and responsibilities?

- 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.



bb functions. en roles. housed within the Files tab. or candidates.

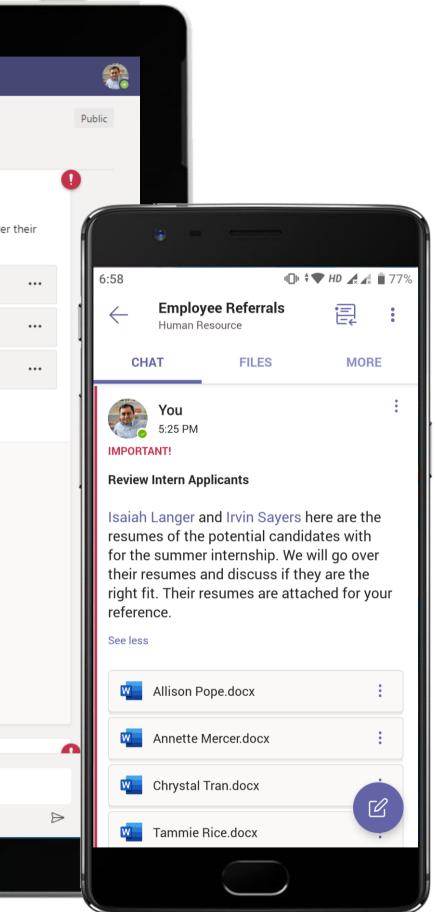
Which app integrations on Teams made it possible?

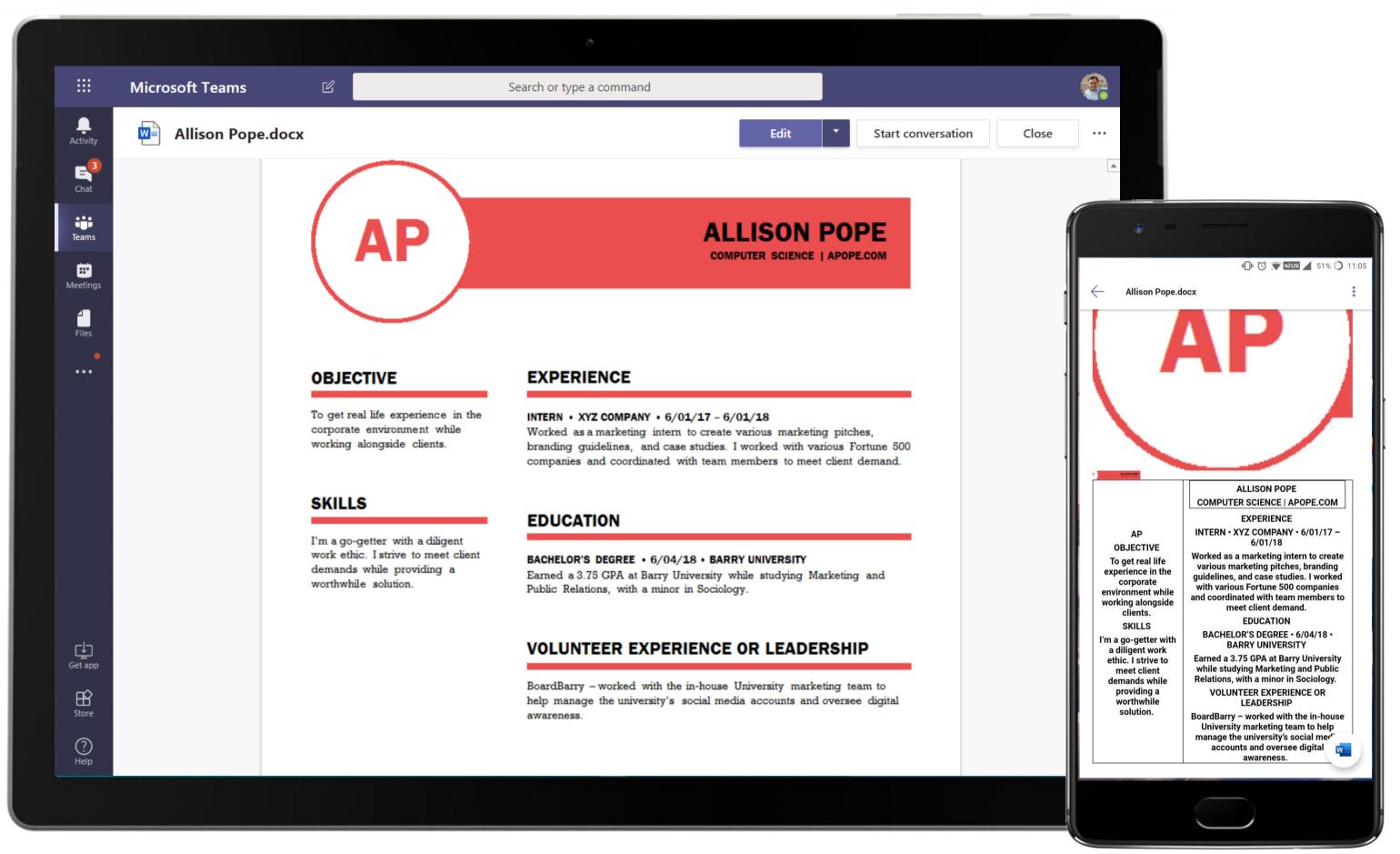


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	mployee Engagement			IMPORTANT! Review Intern Applicants Isaiah Langer and Irvin Sayers here are the resumes of the potential candidates with for the summer internship. We will go resumes and discuss if they are the right fit. Their resumes are attached for your reference.				
	mployee Referrals							
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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.







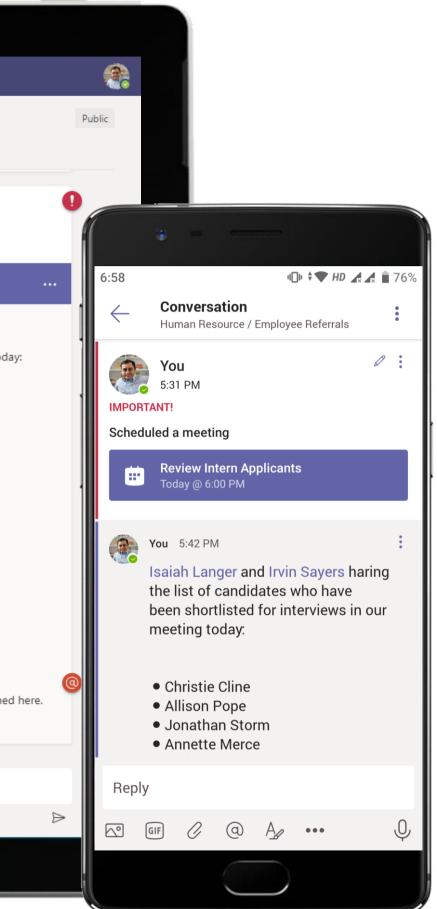
Enjoy powerful document creation and editing with Word. Store team documents easily and securely.

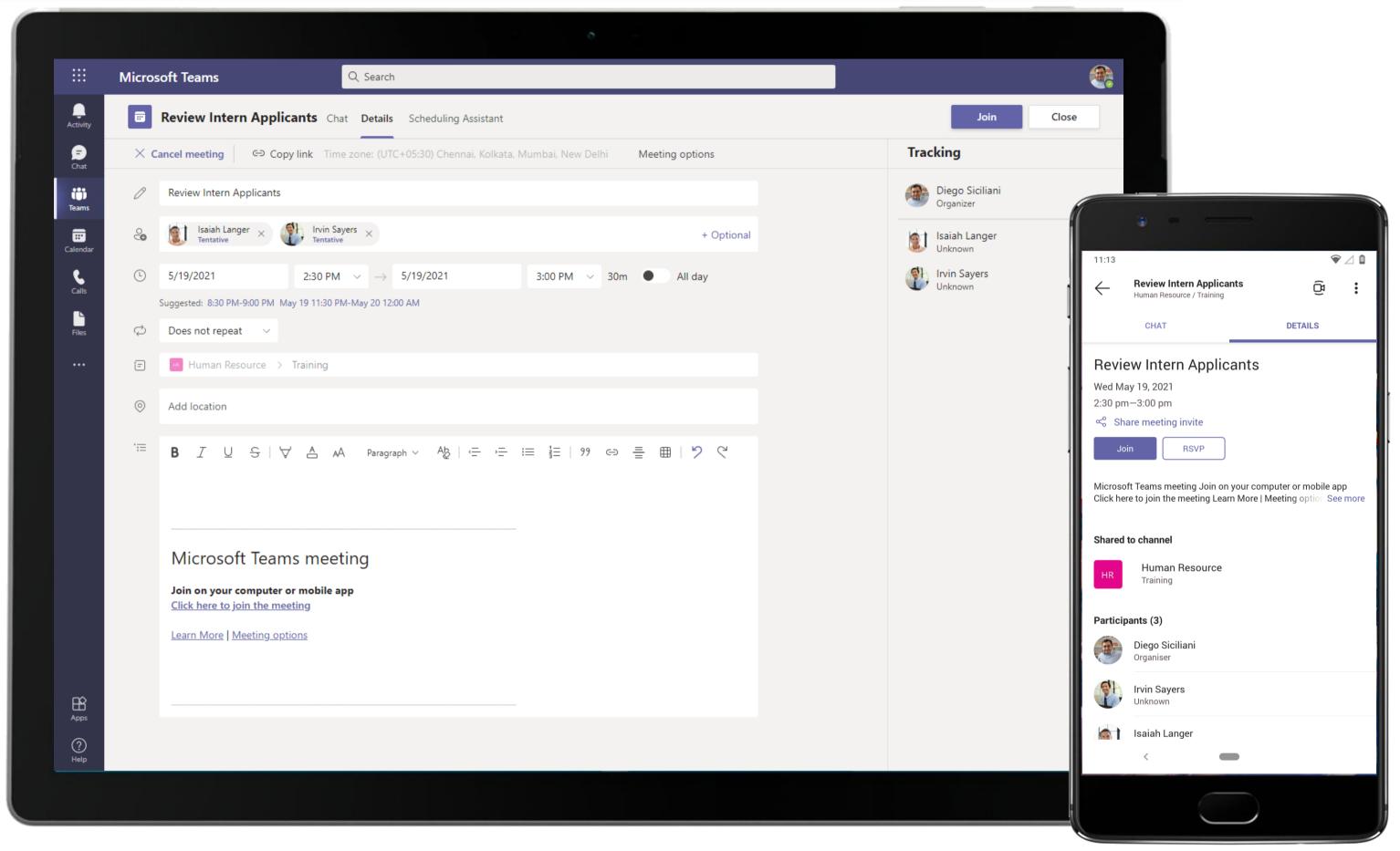


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eams	Employee Engagement Employee Referrals		Diego Siciliani 5:31 PM Edited IMPORTANT! Narrowing Down Candidates
	Review 2 hidden channels	0	This meeting is to finalize potential candidates for the summer internship Review Intern Applicants We have been been 10,2010,0000000
Files	F Finance		Wednesday, June 19, 2019 @ 6:00 PM Collapse all
	General ! Budget and Approvals	0	 Diego Siciliani 5:42 PM Isaiah Langer and Irvin Sayers haring the list of candidates who have been shortlisted for interviews in our meeting tod Christie Cline
	Rorthwind Website Update General		Allison Pope Jonathan Storm Annette Merce
	Business Analyst Team Development Team		Enrico Cattaneo I have assigned them to their respective roles under the pinned Planner tab Candidate Open Roles. See lass
Get app Store	UX and Design Team Image: Northwest Experience Design T General Analyst-Sr. Analyst Consultant-Sr. Consultant Manager-Grp. Manager		See less Image: Start a new conversation. Type @ to mention someone.
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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.







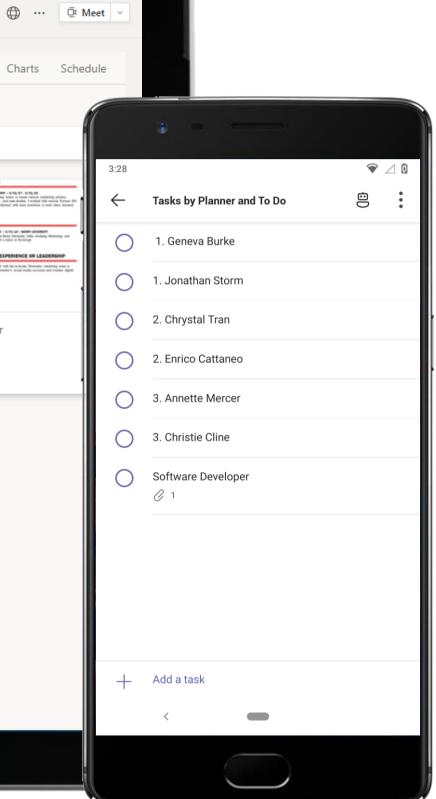
When the Manager looks to create a meeting invite for discussing the profiles of the shortlisted candidate, he can use the native scheduling calendar to check for optimal meeting time for all attendees.



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Chat Teams Calendar	Your teams HR Human Resource General Candidate Referrals Employee Engagement Employee Performance Employee Referrals		Marketing Intern: + Add task 1. Geneva Burke	Group by Bucket v UX Designer + Add task 1. Jonathan Storm	Filter ~ List Board Interviewing + Add task
Files	Planning Review Training Hidden teams		 2. Enrico Cattaneo 3. Annette Mercer 	 2. Chrystal Tran 3. Christie Cline 	FILE Search and Sear
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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!

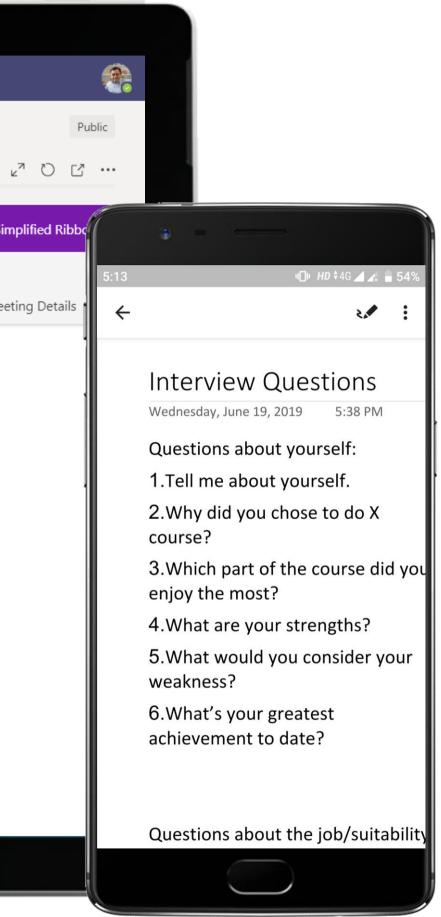




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Files	Network Operations Cen General Emergency	•••	Interview Questions Monday, May 13, 2019 11:11 AM	
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	Contoso Airlines SOCs General	•••	2.Why did you chose to do X course?3.Which part of the course did you enjoy the most?4.What are your strengths?	
	Chicago SOC Dubai SOC		5.What would you consider your weakness?6.What's your greatest achievement to date?	
	Seattle SOC Washington DC SOC	!		
¢.	1 hidden channel Contoso Airlines Seatac	•••	Questions about the job/suitability for the role: 1 .Why are you interested in working here? 2 .Which aspect of the job interests you the most?	
Get app	General Customer Service		2. Which aspect of the job interests you the most:	
? Help	ະວ້ Join or create a team	ŝ		

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.

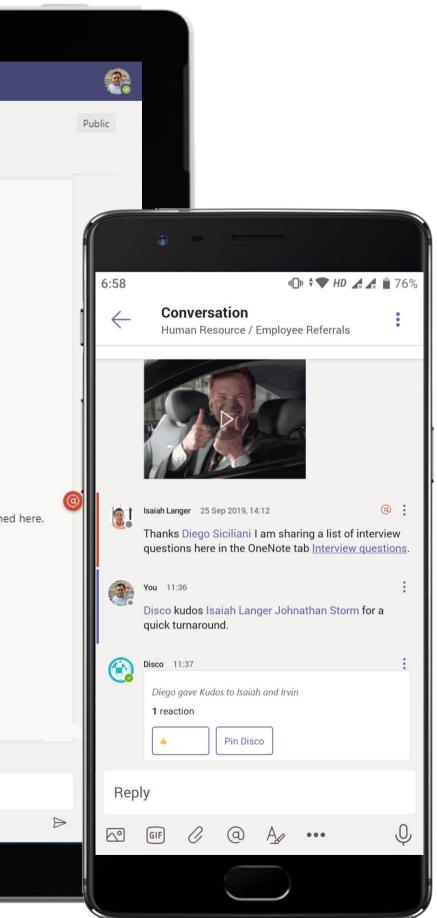




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Recognize and appreciate employees and coworkers with Disco. Deliver in a chat, or for wider recognition, send it in a channel conversation. The new joinee gets confidence boost as he receives accolades from the HR Manager.







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. ٠
- 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. ٠
- Appreciates teams' efforts and presentation at short notice. •

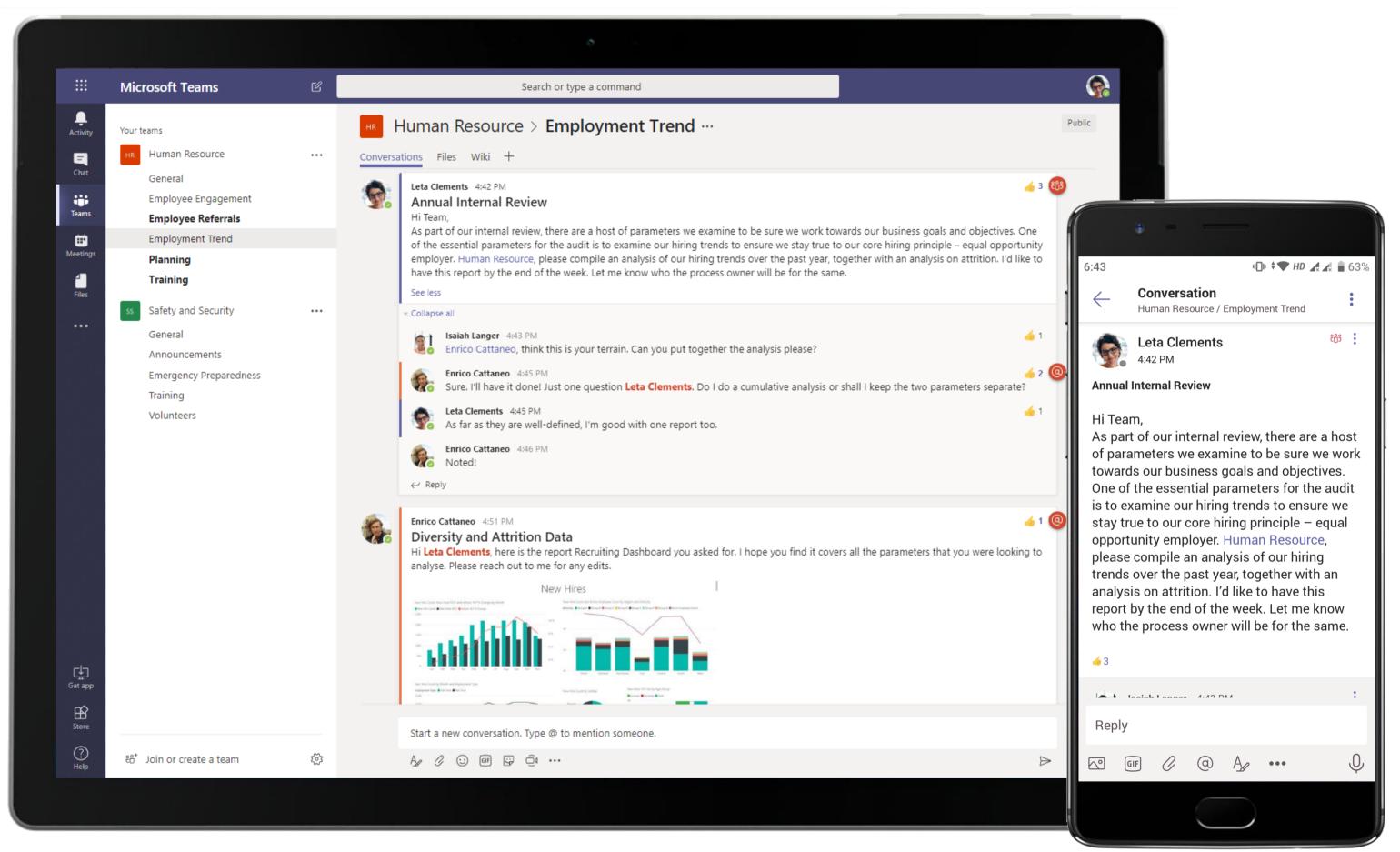
How did Teams help the Director execute her roles and responsibilities?

- Reach entire team by creating conversation threads in channels. ٠
- 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. ٠



Which app integrations on Teams made it possible?





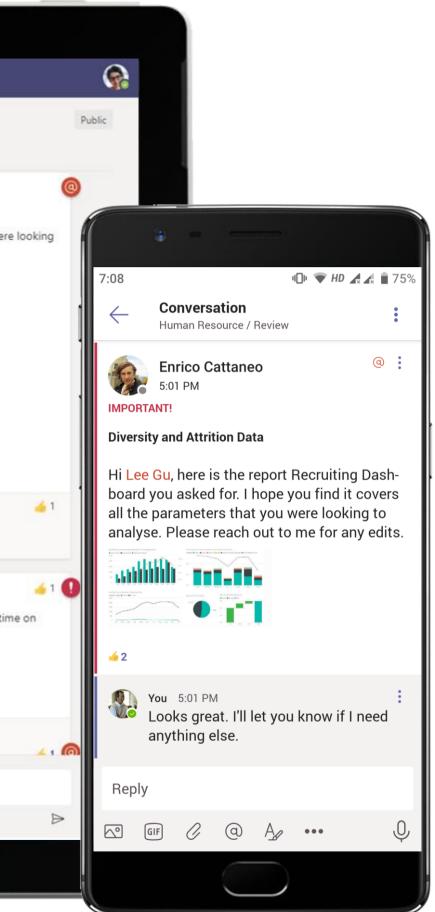
@mention in channels and chats allow users to tag individuals, channels or entire team to ensure relevant people are looped in. The Director posts a message in the channel and @mentions the team to get everyone's attention.

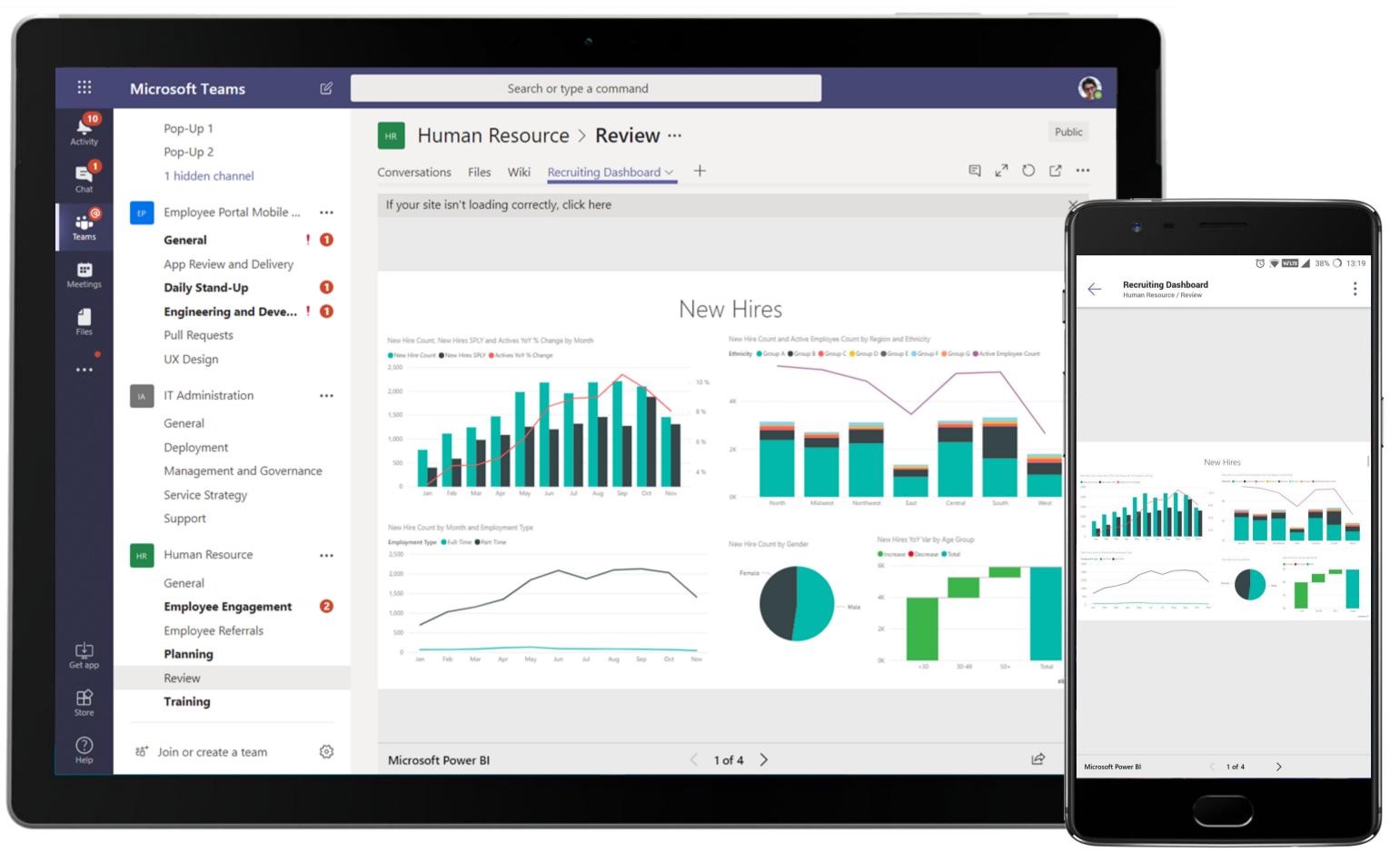


	Microsoft Teams	Ľ	Search or type a command
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E Meetings	General		to analyse. Please reach out to me for any edits.
	Employee Engagement		
Files	Employee Referrals		
	Employment Trends		
			See less Lynne Robbins 6/21 12:05 PM Looks great. I'll let you know if I need anything else.
da			 Lynne Robbins 6/21 12:09 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 to this. Enrico CattaneoE. I do have a few points that I think we should integrate into our existing diversity efforts: Deploy a committee to examine instances of unconscious bias or prejudice Host one annual event that is diversity-related and promotes it Include diversity as an essential parameter in the feedback form for employees
Get app			- Collapse all
œ			14 X Jesish Langer, 6/21 12:10 DM
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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.

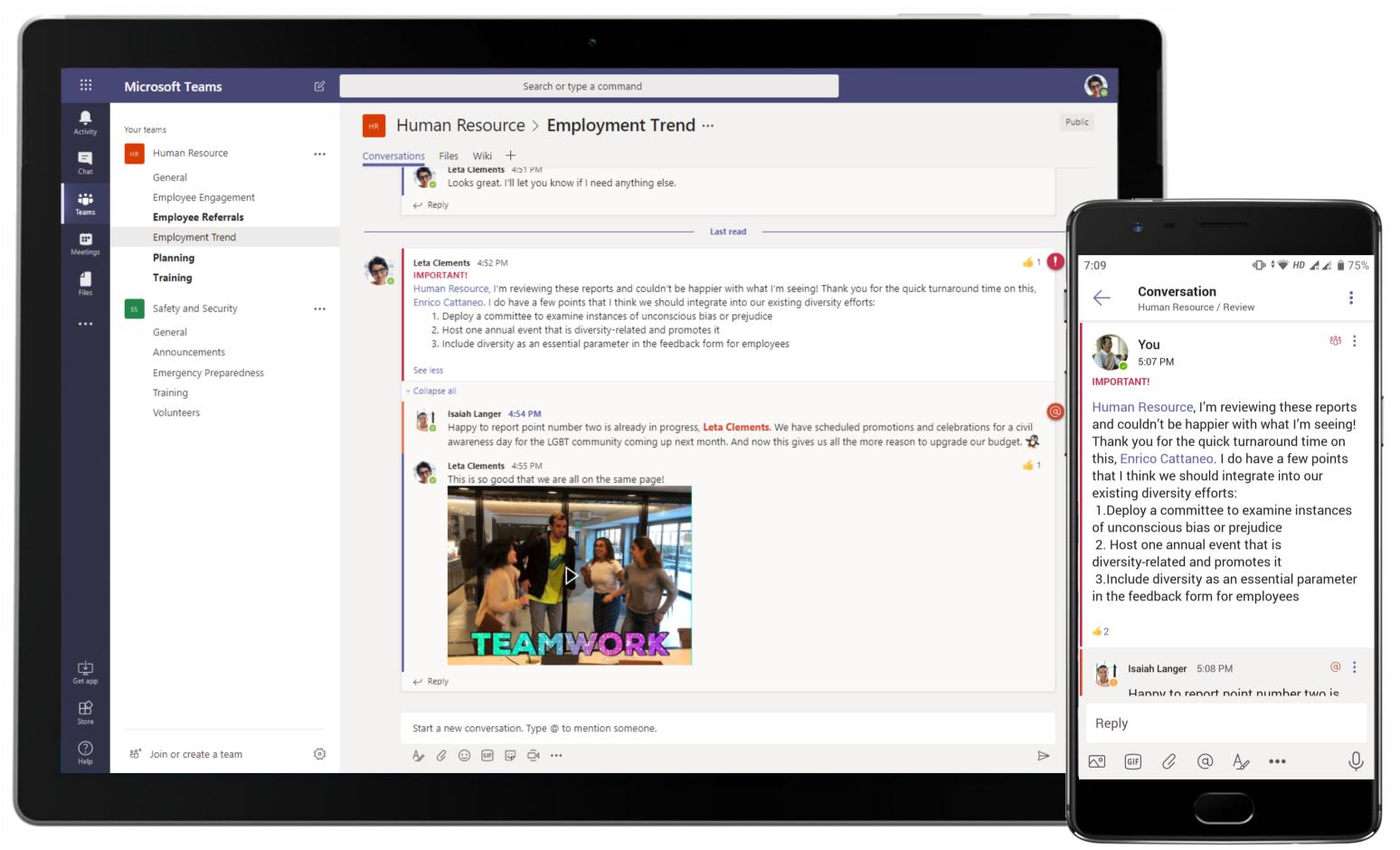






Facilitate data-driven decisions informed by visualizations and actionable insights using Power BI for Microsoft Teams. The Director is able to see trends over time, catch outliers and identify the next steps with her team.





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. ٠
- 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?

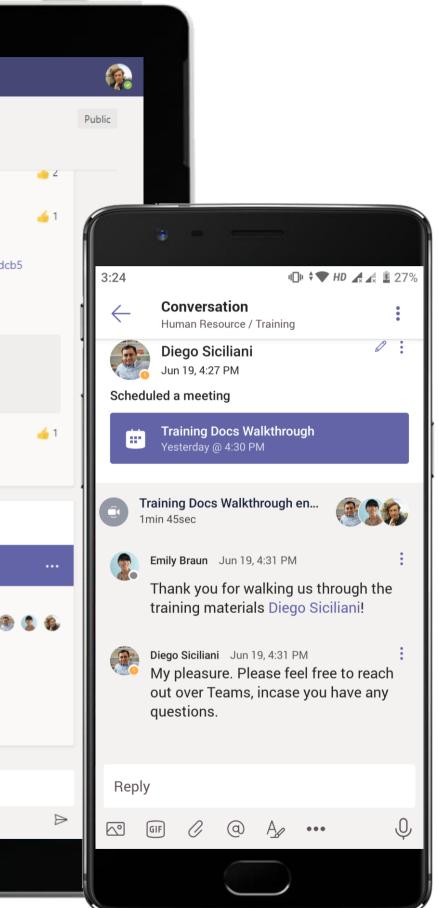


Fxcel

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Files	Community HR Announcements Leadership Review New Hire Summer Interns Human Resource General Employee Engagement		Let me know if you run into any issues. See less Download the mobile app for Teams Microsoft Teams has a mobile app that is available for iOS, Android, and Windows Phone. Support.office.com Will do!	
	Employee Referrals Training 2 hidden channels	Ţ	Diego Siciliani Yesterday 4:27 PM Edited I am Scheduling a sync up call later today to walk you guys through the training documents.	
Get app			Image: Training Docs Walkthrough Wednesday, June 19, 2019 @ 4:30 PM Collapse Image: I	¢
Store			Start a new conversation. Tune @ to montion company	
? Help	ະຶບ ⁺ Join or create a team	5	Start a new conversation. Type @ to mention someone.	

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.



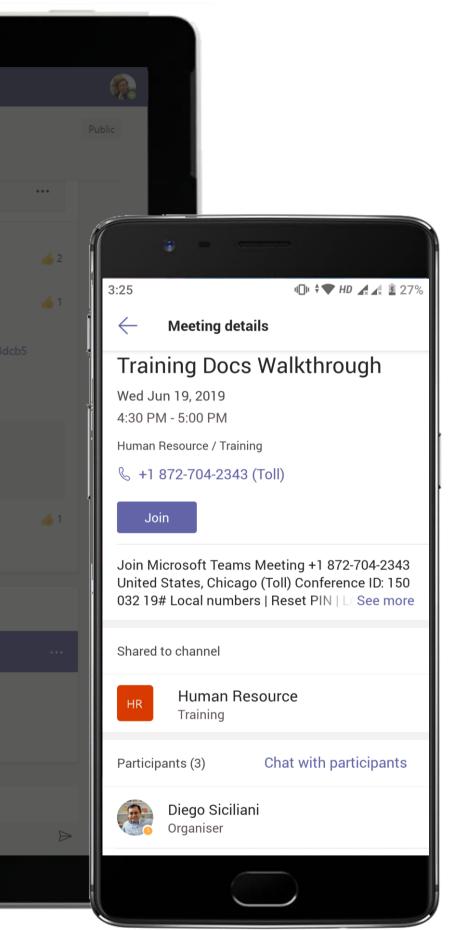


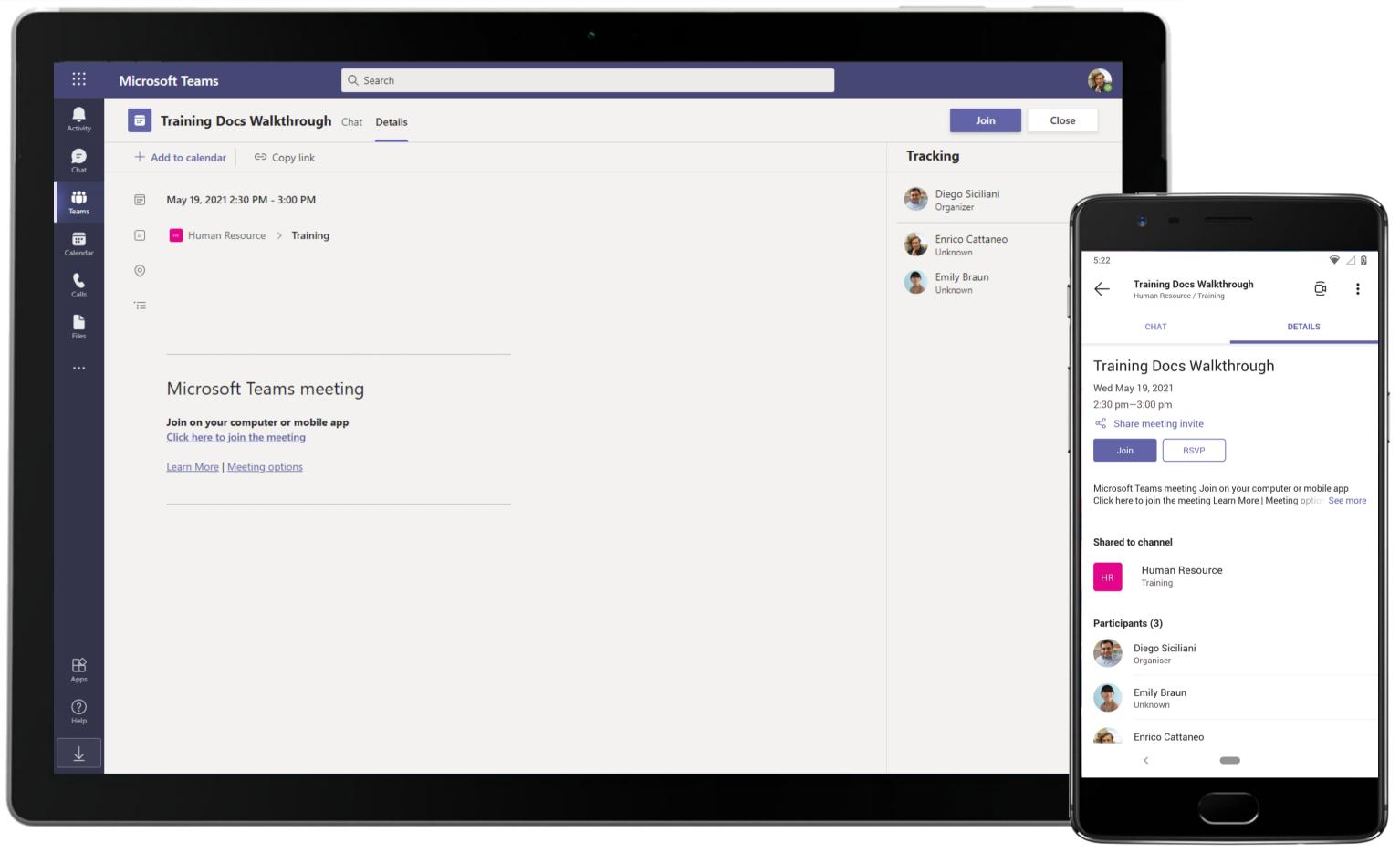
Human Resource - Onboarding Challenges Made Easy

	Microsoft Teams		Search or type a command				
	Your teams		Human Resource > Training …				
	Finance General		Conversations Files Wiki Meeting Notes New + Training Schedule.xlsx HumanResource > Training		Training Do	oc.docx	
Teams	Budget and Approva-	Training Door					
Meetings	General	Wednesday, June		Organi	izer		
	Community HR Announcements	4:30 PM - 5:00 PM Human Resource			Diego Siciliani Organizer		
	Leadership Review New Hire	Join	Chat with participants	Attend	lees Enrico Cattaneo		3c4-751edc23
	Summer Interns HR Human Resource	You did not respon	d to this meeting		Unknown Emily Braun		
	General Employee Engagemen			HR	Unknown Human Resource		
	Employee Referrals Training				Unknown		
	2 hidden channels	Join Microsof	ft Teams Meeting				
		+1 872-704-2343 Conference ID: 150	United States, Chicago (Toll) 032 19#				
		This is a Microsoft Te	eams online meeting. Everyone can join online.			Close	
			Diego Siciliani Testeroay 4:51 PM				
			✓ My pleasure. Please feel free to reach out over ← Reply	Teams, incas	se you have any quest		
			Start a new conversation. Type @ to mention someone				
	ະຕໍ ⁺ Join or create a team		A₂ ⁄⁄ ⊕ @ ₽ Q				

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!







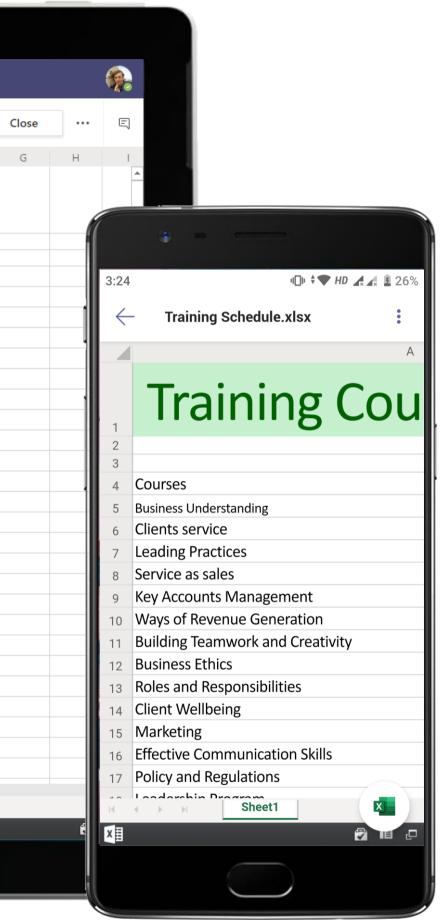
Host regulations and reference material in OneNote for the teams' easy access and consumption within channels. The Operations Agent has quick access to the OneNote virtually anywhere, anytime across devices and platforms!

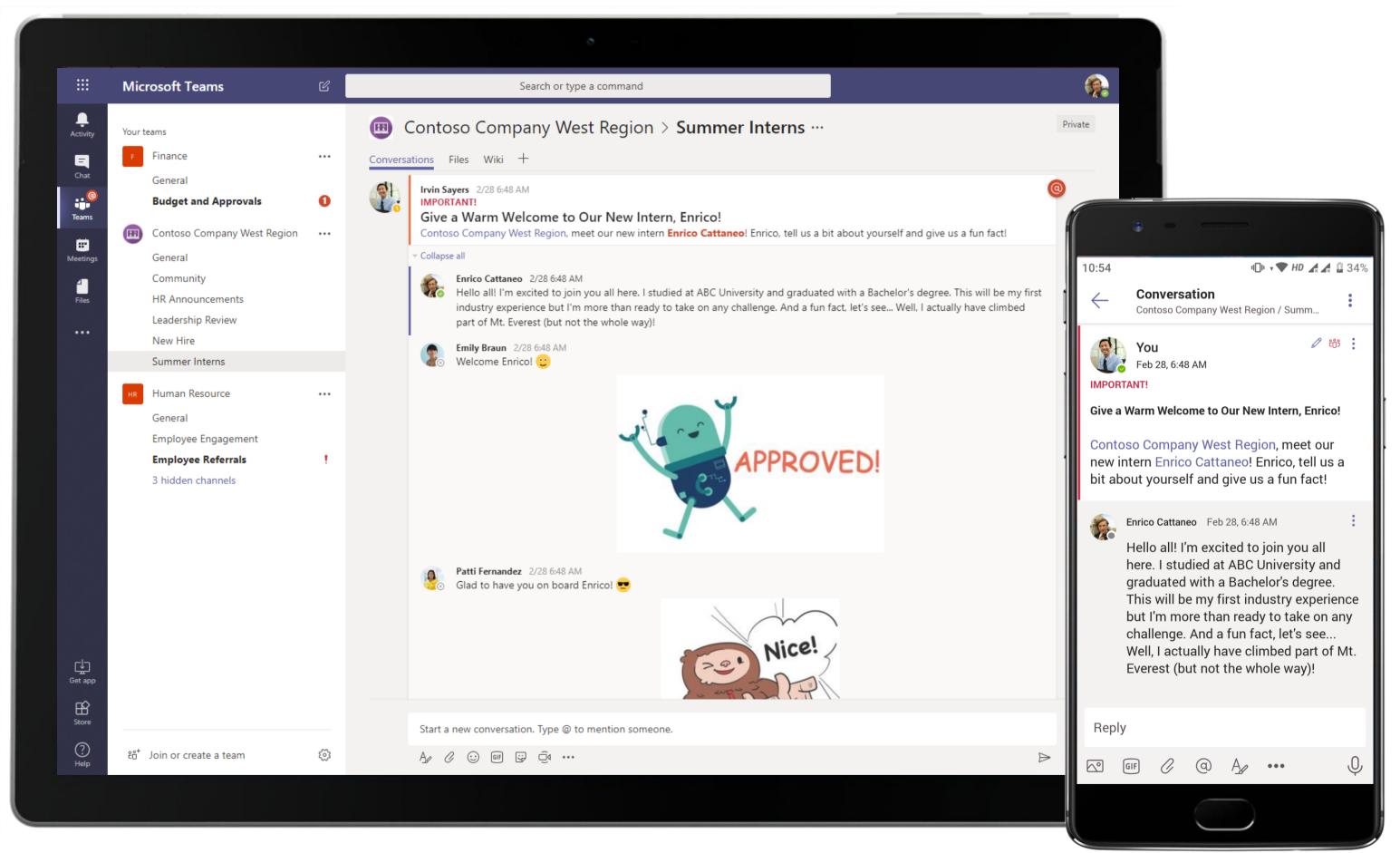


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L Activity	I	Training Schedule.xlsx				Edit	•	(
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@		Training Courses						
leams	1	Hunning Courses						
	2							
tings	3	Courses	Duration					
	4	Business Understanding	Classroom, 5 hours					
25	6	Clients service	Classroom, 3 hours					
	7	Leading Practices	Classroom, 5 hours					
•	8	Service as sales	Classroom, 2 hours					
	9	Key Accounts Management	Classroom, 4 hours					
	10	Ways of Revenue Generation	Classroom, 4 hours					-
	11	Building Teamwork and Creativity	Classroom, 1 hour					
	12	Business Ethics	Classroom, 3 hours					
	13	Roles and Responsibilities	Classroom, 3 hours					
	14	Client Wellbeing	Classroom, 3 hours					
	15	Marketing	Classroom, 5 hours					
	16	Effective Communication Skills	Classroom, 3 hours					
	17	Policy and Regulations	Classroom, 3 hours					
	18	Leadership Program	Classroom, 5 hours					
	19	Awareness Workshop	Classroom, 2 hours					
	20	Frontline Duties	Classroom, 3 hours					
	21	Alliances and Partnerships	Classroom, 5 hours					
	22	Revenue Management	Classroom, 4 hours					
	23	Experts Training on Personality Development	Classroom, 3 hours					
	24	Managing Oneself and the Team	Classroom, 4 hours					
	25							
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The Operations Agent uses channel conversations to relay updates to team members and kick-start a process flow for task completion.

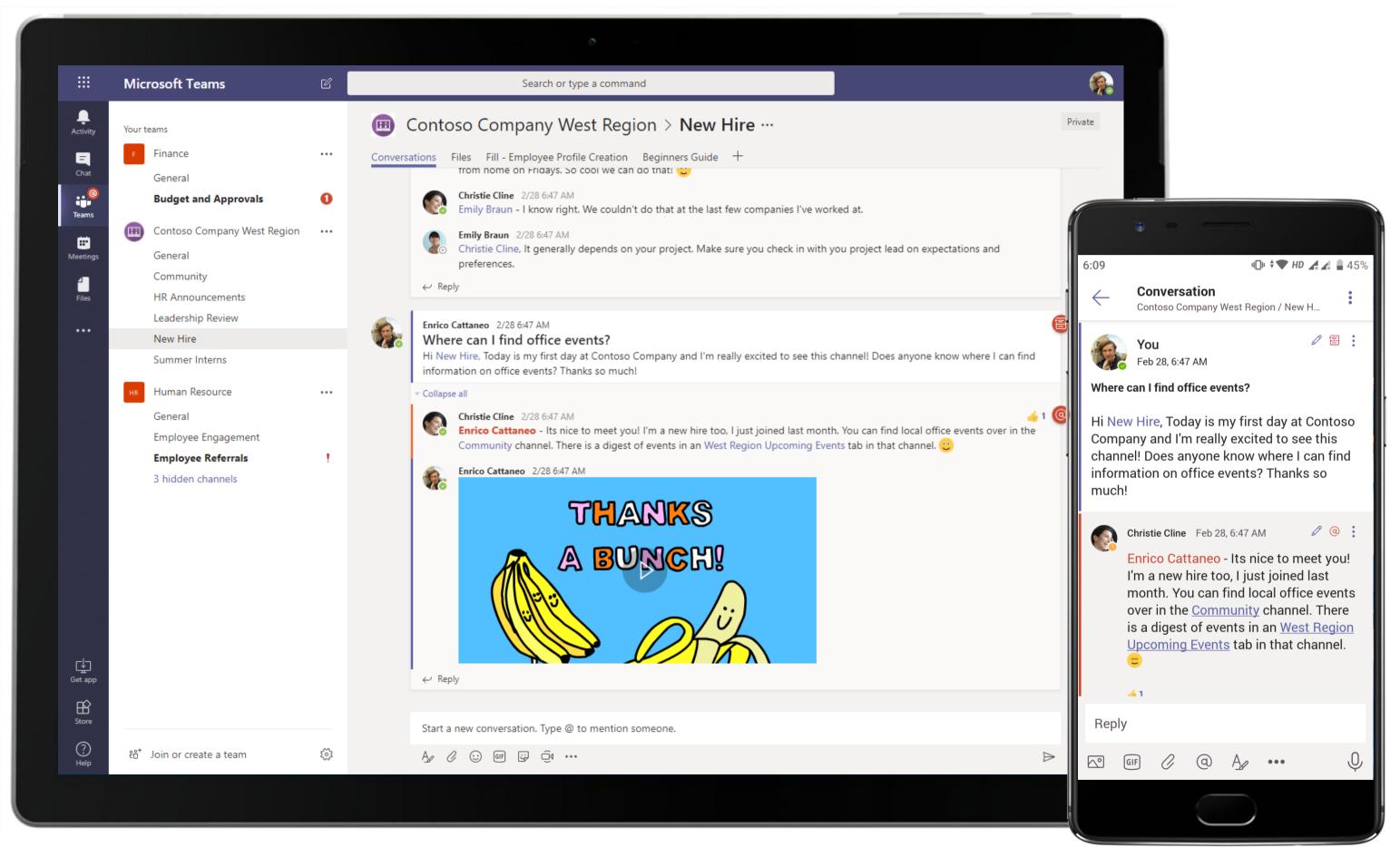






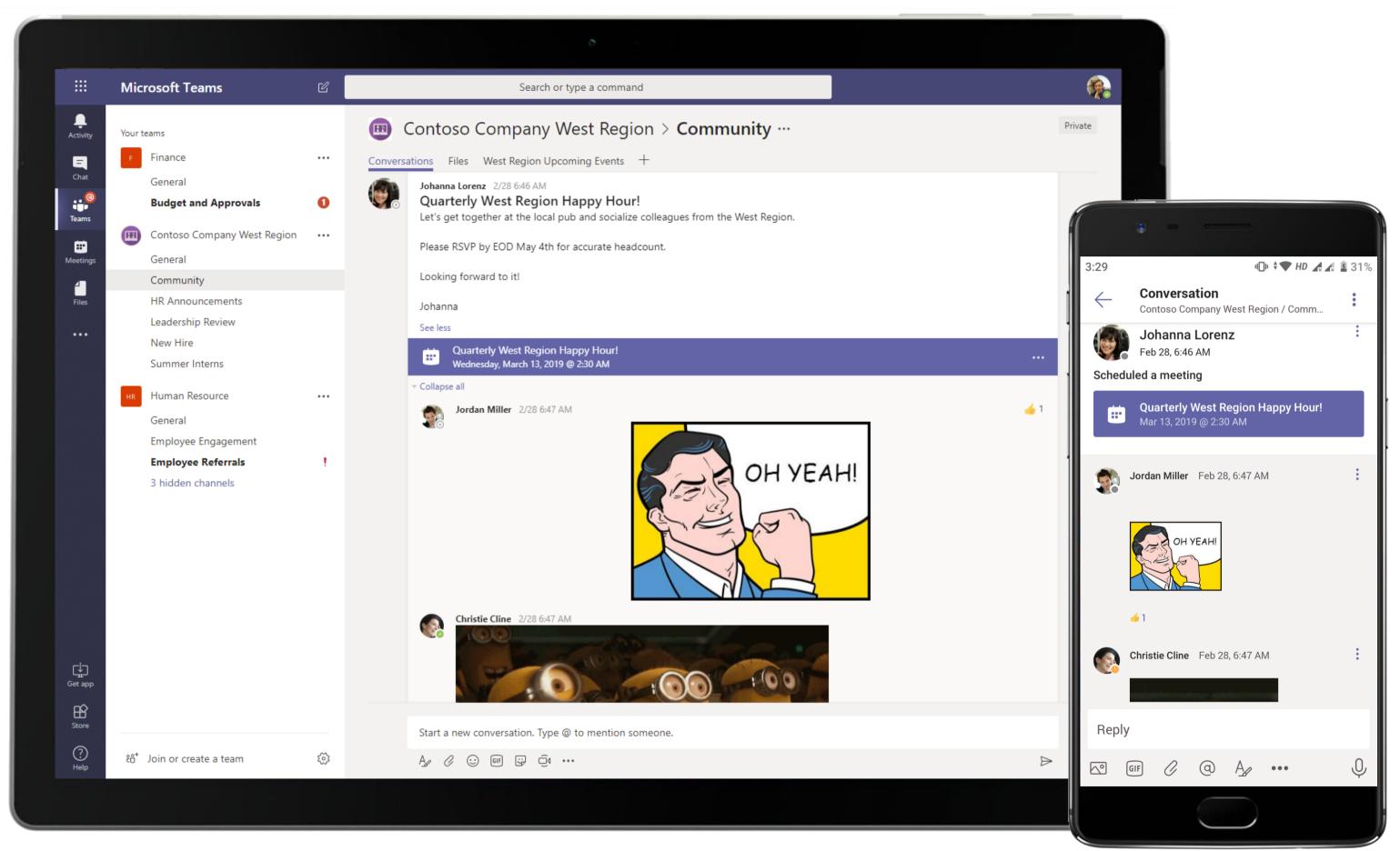
The custom-built app Flight Information Bot helps the Operations Agent search for alternative flight schedules, seat availability between locations and take actions such as rebooking a passenger to another flight without leaving Teams.





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.

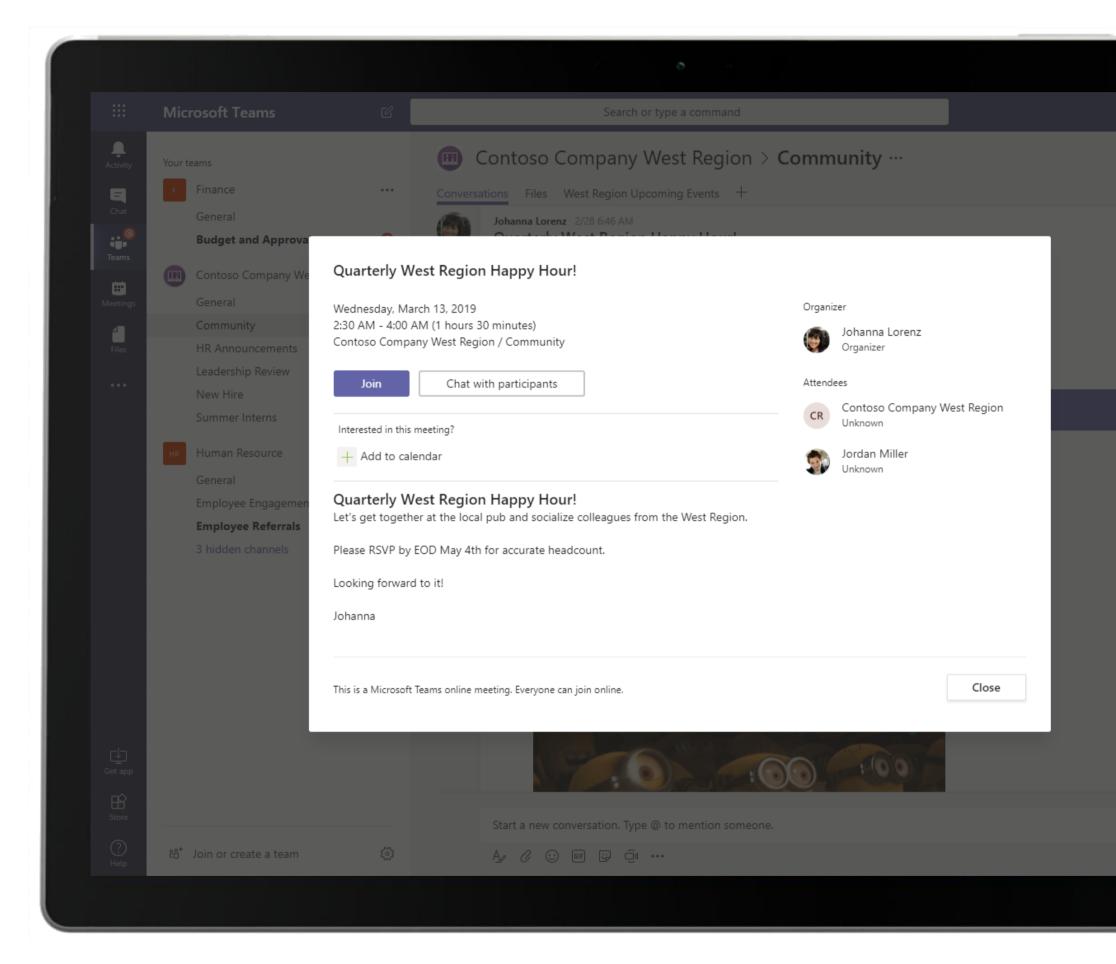




Build dynamic data visualizations, measure metrics and track analytics through Power BI within Teams. The Operations Agent uses Power BI to check the passenger score for involutory bumping enabling faster business decision making!

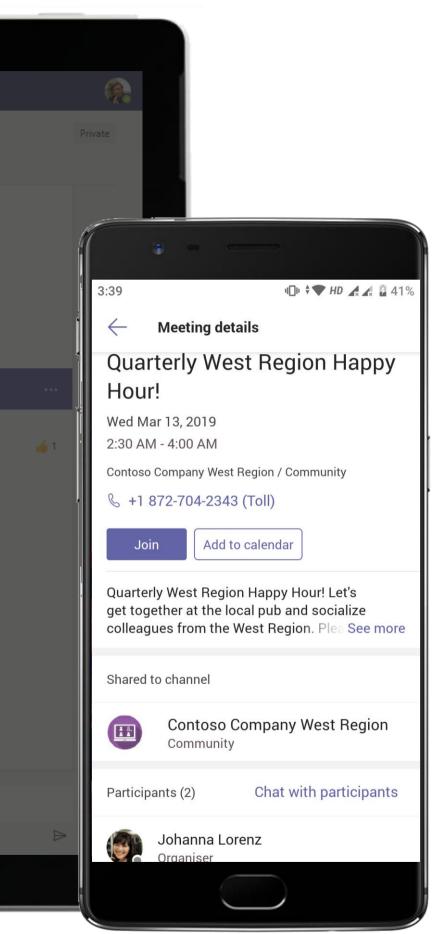


Human Resource - Onboarding Challenges Made Easy



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

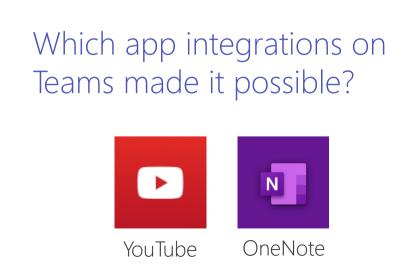
Contoso uses Microsoft Teams to make competency training a positive and fun experience for their employees, while also ensuring the training stays relevant for each job title. A User Experience (UX) Designer has recently been promoted to a Consultant level at Contoso, which will require extra training 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. ٠
- 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. •

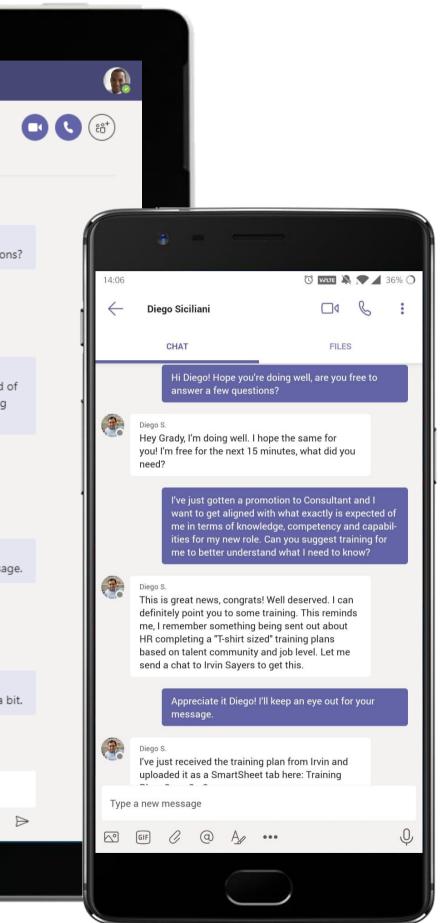


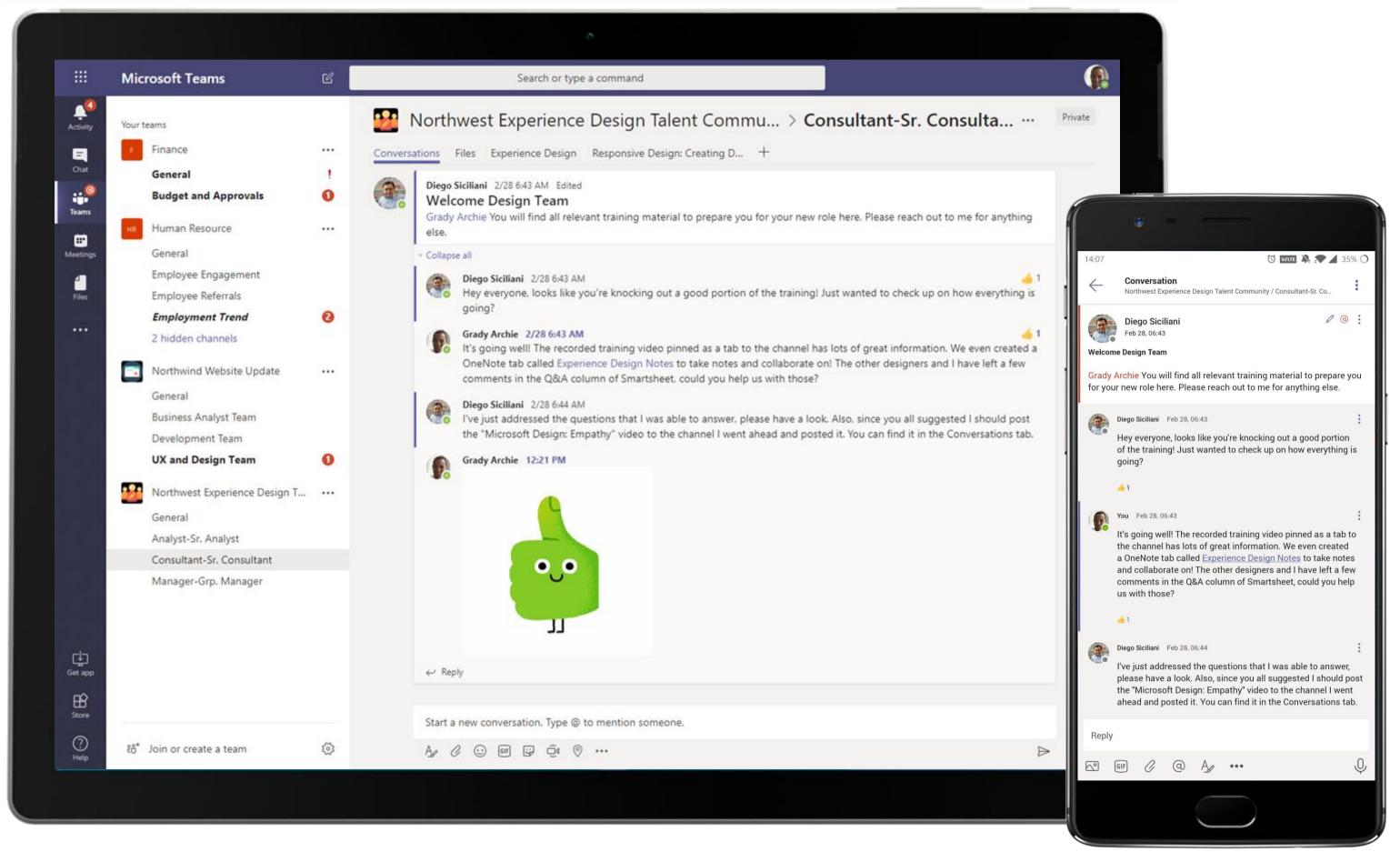


	Microsoft Teams 🛛		Search or type a com	mmand	
Activity	Recent Contacts Pinned	Conversation			
Chat	Piego Siciliani 2/28 You: Awesome, thank you for tracking thi		Diego Siciliani added Grady Archie to the	e conversation.	
Teams	Diego and Patti 2/28 Diego: Thanks for doing this Patti Fernan Recent			2/28 6:56 AM Hi Diego! Hope you're doing well, are you free to answer a few ques	tio
eetings Meetings Files	Planner 6/24 Task "Collect response from team for coll Suggested		Diego Siciliani 2/28 6:56 AM Hey Grady, I'm doing well. I hope need?	e the same for you! I'm free for the next 15 minutes, what did you	
	🚱 Adele Vance		me in terms of k	a promotion to Consultant and I want to get aligned with what exactly is expect knowledge, competency and capabilities for my new role. Can you suggest train r understand what I need to know?	
	Christie Cline Diego Siciliani Henrietta Mueller	e	me, I remember something being	II deserved. I can definitely point you to some training. This reminds g sent out about HR completing a "T-shirt sized" training plans job level. Let me send a chat to Irvin Sayers to get this.	
	Irvin Sayers			2/28 6:56 AM Appreciate it Diego! I'll keep an eye out for your me	ssa
	الله Lee Gu لائی Lidia Holloway		Diego Siciliani 2/28 6:56 AM I've just received the training plan Con - Sr. Con.	n from Irvin and uploaded it as a SmartSheet tab here: Training Plan:	
¢	Lynne Robbins			2/28 6:56 AM Awesome, thank you for tracking this down Diego! I'll begin the training ir	na
Get app	Megan Bowen				
Store	🚱 Miriam Graham		Type a new message		
Help	📻 Nestor Wilke		A₂ ℓ ⊙ ₪ ♀ ₫ …		

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.







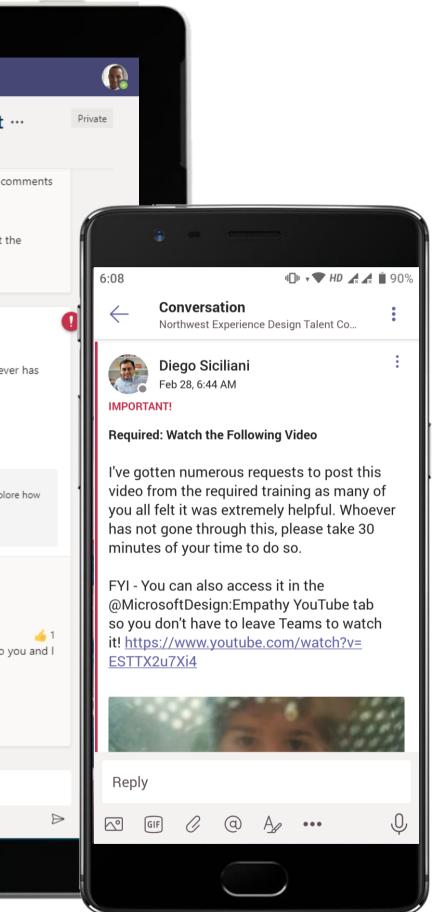
Channel conversations can contain a lot things – conversations, files shared by team members, meeting threads, and GIFs! Use social features like reacting to team members' conversations and responses to acknowledge them.



	Microsoft Teams	Ľ	Search or type a command
Activity Chat Teams Meetings Files	Your terms Image: Second state of the sec	••••	 Northwest Experience Design Talent Community > Consultant-Sr. Consultant Se iss Experience Design Responsive Design: Creating D + OneNote tab called Experience Design Notes to take notes and collaborate on! The other designers and I have left a few in the Q&A column of Smartsheet, could you help us with those? Piego Siciliani 2/28 644 AM Ver just addressed the questions that I was able to answer, please have a look. Also, since you all suggested I should post "Viccosoft Design: Empathy" video to the channel I went ahead and posted it. You can find it in the Conversations tab. Reply Piego Siciliani 2/28 644 AM Pogoticiliani 2/28 644 AM Progoticiliani 2/28 644 AM
Get app Store	۴° ⁺ Join or create a team		• Collapse all Image: Second conduction of the second c

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.

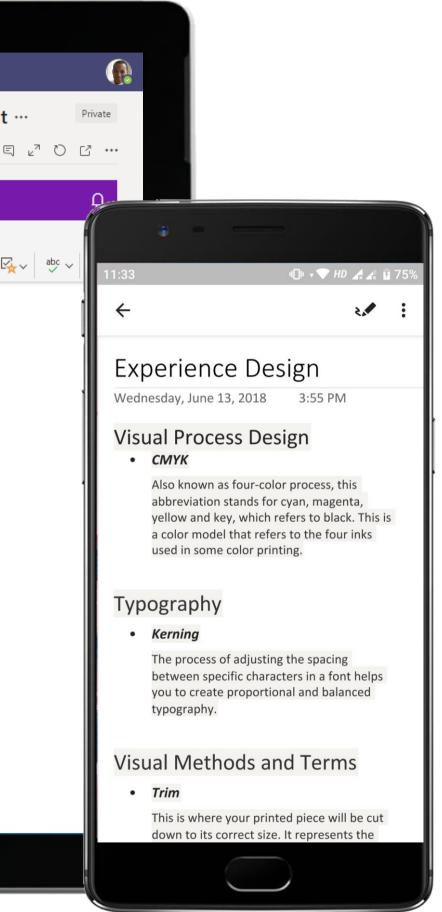




	Microsoft Teams	C	Search or type a command
Activity	Your teams		Northwest Experience Design Talent Community > Consultant-Sr. Consultant
— Chat	General	•••	Conversations Files Experience Design ~ Responsive Design: Creating D +
Teams	Business Analyst Team Development Team		N OneNote Online - Saved
	UX and Design Team		File Home Insert Draw View Help Open in OneNote
Files	Northwest Experience Design T General Analyst-Sr. Analyst		
	Consultant-Sr. Consultant Manager-Grp. Manager		Wednesday, June 13, 2018 3:55 PM Visual Process Design
	F Finance General		CMYK Also known as four-color process, this abbreviation stands for cyan, magenta, yellow and key, which refers to black. This is a color model that refers to the four inks used in some color printing.
	Budget and Approvals		 Kerning The process of adjusting the spacing between specific characters in a font helps you to create proportional and balanced typography.
			 Visual Methods and Terms Trim This is where your printed piece will be cut down to its correct size. It represents the final dimensions of your project. Bleed This refers to the area outside the trim that still prints in case the cuts are not exact. It gives the printer a small amount of space to
Get app			 account for the movement of the paper and design inconsistencies. <i>Pica</i> A typesetting unit of measurement equaling one-sixteenth of an inch. InDesign and other design software use picas as a way to measure size and space. <i>Comp</i>
Store			 A rough version of your design that is often created as a pencil sketch, but it can be digital as well. RGB This abbreviation stands for red, green and blue. It's a color mode for all images shown through an electronic display, such as a computer or television.
? Help	ະວີ້ Join or create a team	\$	

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.

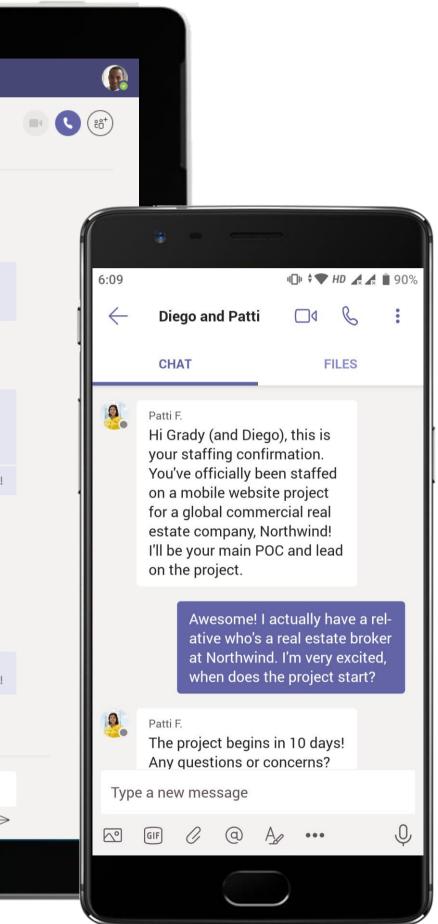




	Microsoft Teams	C		Search or type a command	
Activity	Recent Contacts Pinned		© Diego, 3 participants Conversation Files		
Chat Teams	Diego Siciliani You: Awesome, thank you for trackin Diego and Patti Diego: Thanks for doing this Patti Fe	2/28	e	Patti Fernandez 2/28 6:56 AM Hi Grady (and Diego), this is your staffing confirmation. You've officially been staffe website project for a global commercial real estate company, Northwind! I'll be yo lead on the project.	
Heetings Heetings Files	Recent Planner Task "Streamlining Agenda" Suggested	6/18		2/28 6:56 AM Awesome! I actually have a relative who's a real estate broker at N does the project start?	Northwind. I'm very excited, when
	🍖 Adele Vance		9 0	Patti Fernandez 2/28 6:56 AM The project begins in 10 days! Any questions or concerns?	
	Christie Cline			2/28 6:56 AM Actually I do have one concern. I have limited knowledge on mob mobile focused project prior to this. Do you have any suggested to speed on mobile UX between now and the start of the project	training plans to work on to get up
	Renrietta Mueller				I would love any input or direction
	Irvin Sayers		e o	Patti Fernandez 2/28 6:56 AM No problem, I know you'll do just fine. I do have a couple training courses I can loo take a look at them and see which is the better fit for this particular project!	ok through. Let me
			e	Diego Siciliani 2/28 6:56 AM Let me take a look as well, I think I'll be able to find a few trainings that can help. (you please set up a meeting between the 3 of us to discuss tomorrow?	Grady Archie can
	Lynne Robbins			2/28 6:56 AN	1 I'll send some time through shortly
Get app	Megan Bowen		8	Patti Fernandez 2/28 6:56 AM Great meeting everyone!	0
Store	🧑 Miriam Graham			T	
? Help	Restor Wilke			Type a new message A₂ ℓ ☺ ☞ ☞ ➡ •••	1

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.

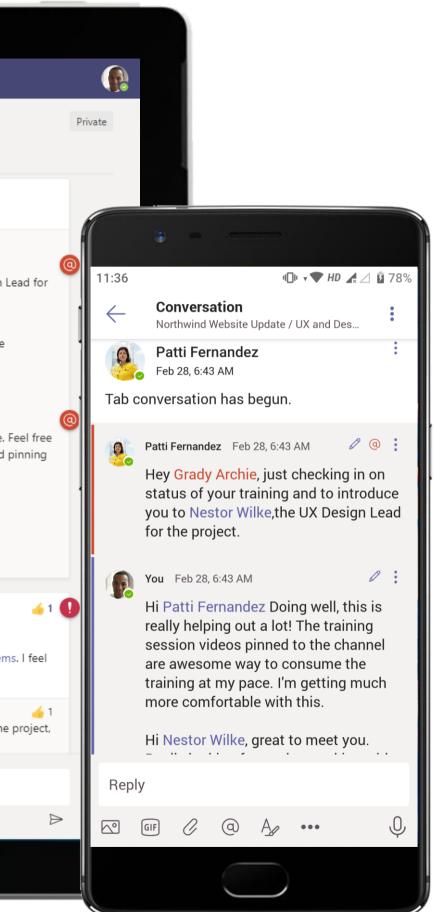


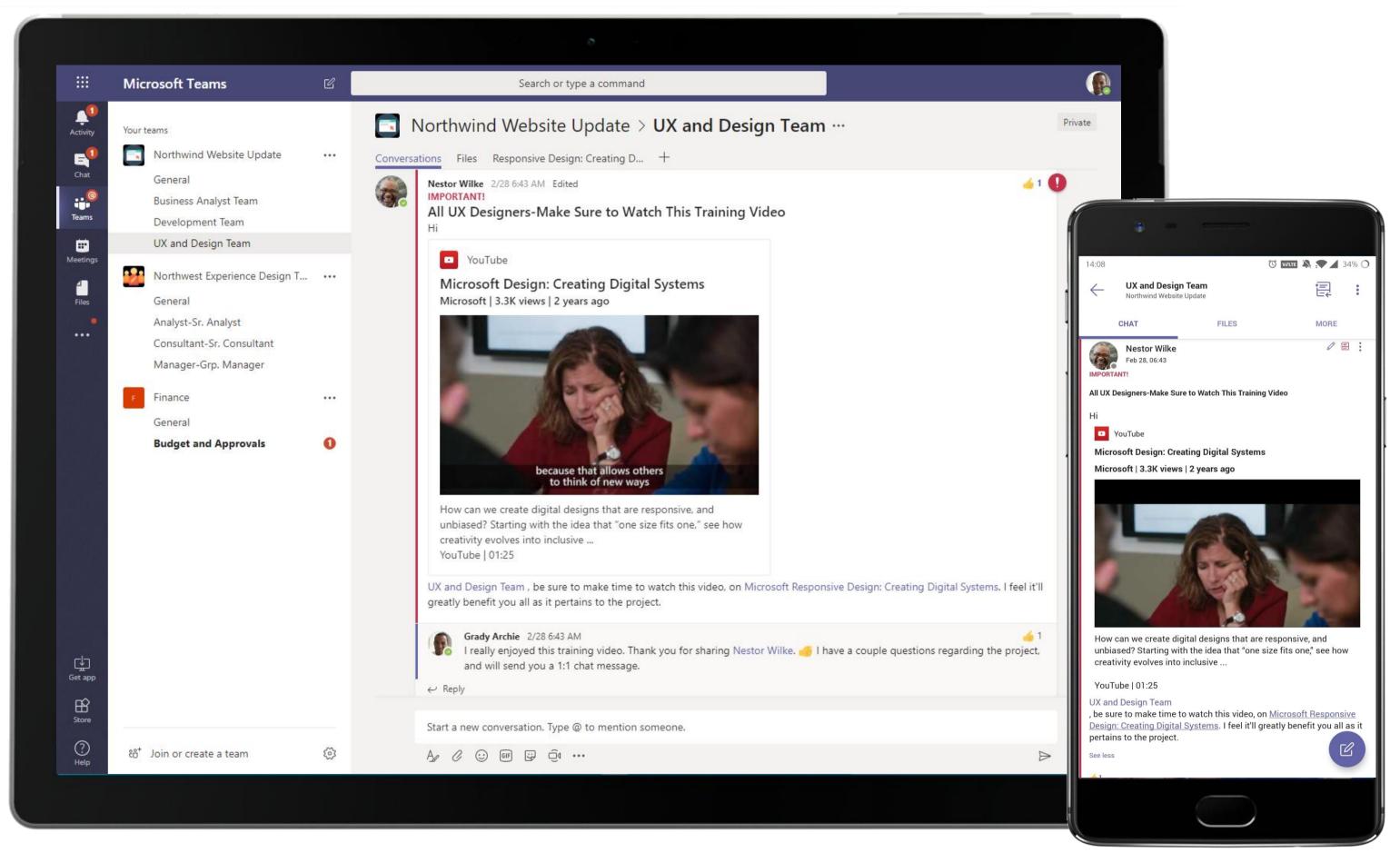


	Microsoft Teams	C	Search or type a command
Activity	Your teams		Conversations Files Responsive Design: Creating D +
Chat Chat Teams	General Business Analyst Team Development Team		Patti Fernandez 2/28 6:43 AM Tab conversation has begun.
	UX and Design Team		Collapse all Patti Fernandez 2/28 6:43 AM Edited
4	Northwest Experience Design T	••••	Hey Grady Archie, just checking in on status of your training and to introduce you to Nestor Wilke, the UX Design the project.
Files	General Analyst-Sr. Analyst Consultant-Sr. Consultant		Grady Archie 2/28 6:43 AM Edited Hi Patti Fernandez Doing well, this is really helping out a lot! The training session videos pinned to the channel are awesome way to consume the training at my pace. I'm getting much more comfortable with this.
	Manager-Grp. Manager		Hi Nestor Wilke, great to meet you. Really looking forward to working with you on this project!
	F Finance General		Nestor Wilke 2/28 6:43 AM Hey Grady Archie, nice to meet you as well. This project should be very interesting and will be a good experience to reach out if you need anything! I would like to prioritize one of your training items though. I would recommend
	Budget and Approvals	0	this post: Nestor Wilke: All UX Designers - Make Sure to Watch This Training Video
			Grady Archie 12:30 PM ← Reply
			Restor Wilke 2/28 6:43 AM Edited IMPORTANT! All UX Designers-Make Sure to Watch This Training Video Hi UX and Design Team, be sure to make time to watch this video, on Microsoft Responsive Design: Creating Digital System it'll greatly benefit you all as it pertains to the project. https://www.youtube.com/watch?v=cph13JC8W_Y
Get app			Grady Archie 2/28 6:43 AM I really enjoyed this training video. Thank you for sharing Nestor Wilke. 🥌 I have a couple questions regarding th and will send you a 1:1 chat message.
Store			Start a new conversation. Type @ to mention someone.
?	ະື່⊖ ⁺ Join or create a team	ŝ	

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.

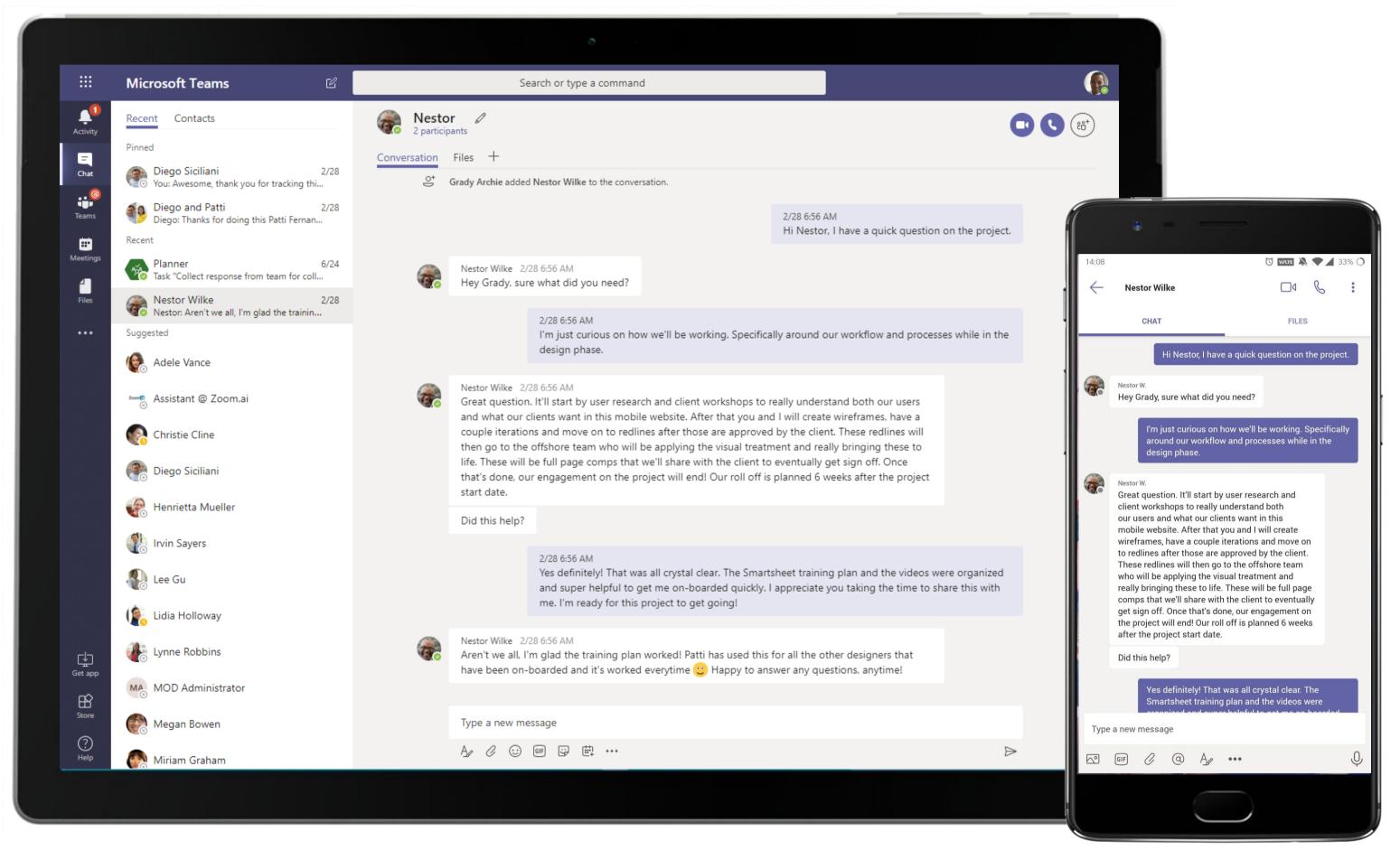






Share a YouTube video with other members by simply pasting the URL in the channel. The lead shares a training YouTube video for the team to watch.





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





Sales

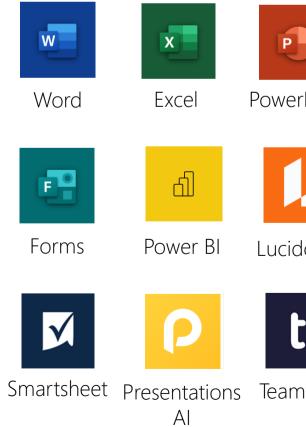
These scenarios will illustrate how Teams can help different Sales roles in quickly turning data into actionable insights, automating manual and repetitive processes and driving better decisions through collaboration.

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 ٠
- Help securely collaborate with teammates using familiar ٠ applications all in a single place

Apps that enable an immersive experience in Teams





	N	•••	//.
rPoint	OneNote	Asana	monday.com
		L.	Μ
dchart	Trello	Shifts	MURAL
	Ja-	R	
nwork	Adobe Sign	Tasks by Planner and To Do	Communities

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 grossprofit 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, longlasting 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

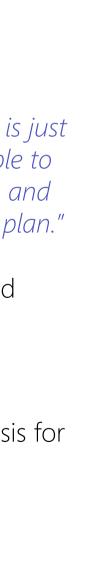


Sales Analyst

"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

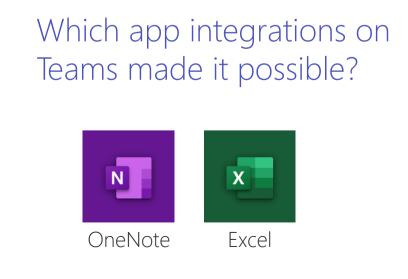
The Sales team constantly interfaces with Marketing and Finance to coordinate their efforts, forecasts and analysis. To that end, the Sales Manager here builds a sales summary for Finance to incorporate in their P&L summary. Find out how Teams offers her the platform to coordinate and share business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

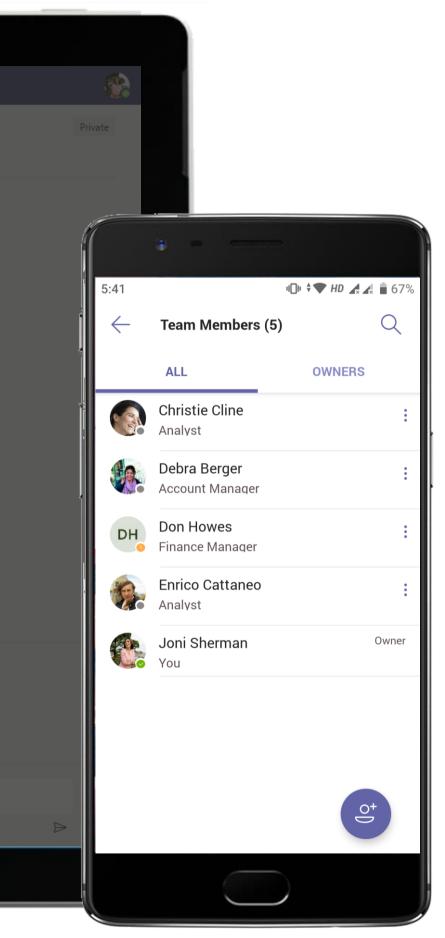


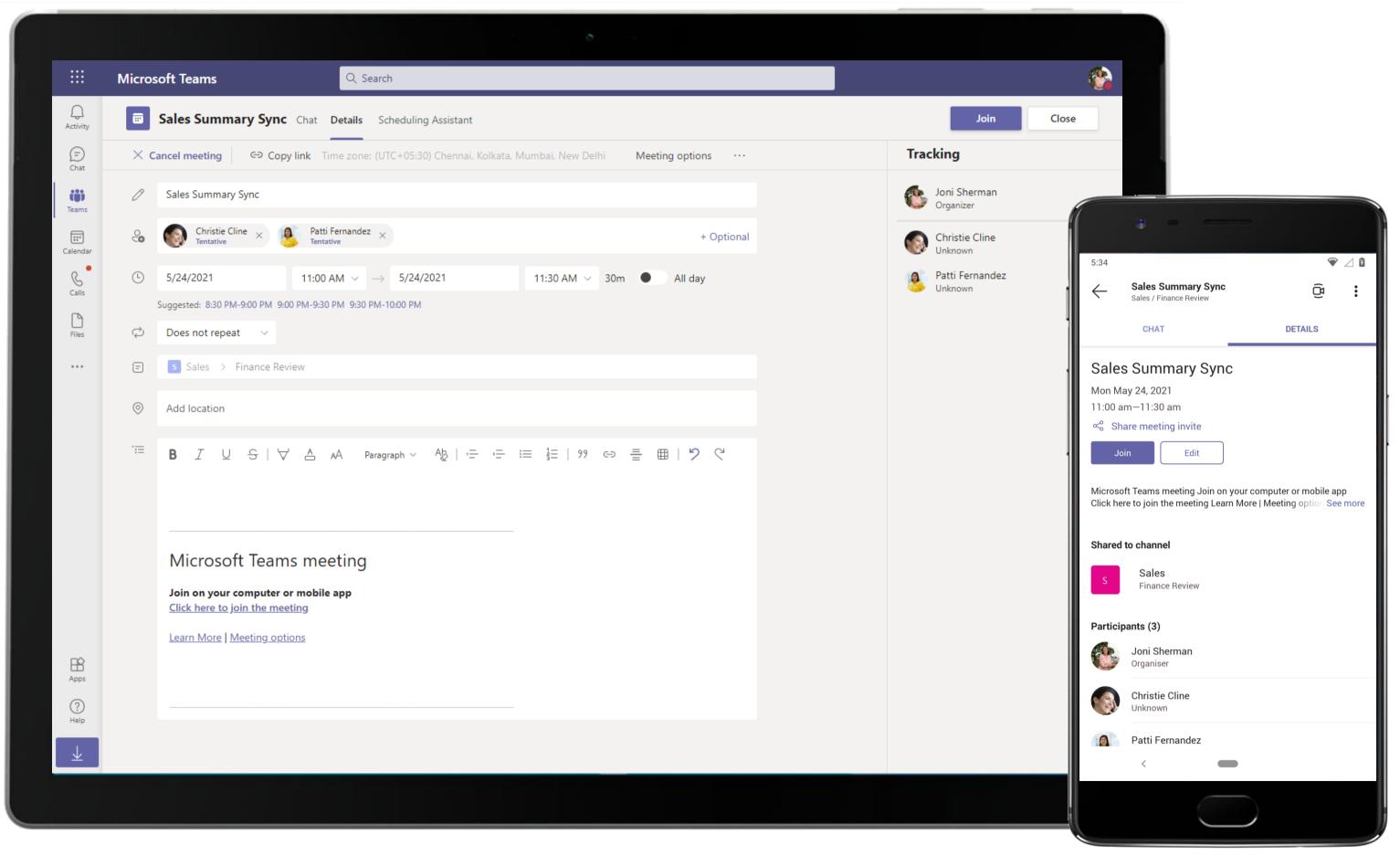


	Microsoft Teams 🛛	Search or type a command
	Your teams	Business Development > General …
	Business Development	Conversations Files +
@	RR RFP Response - Client X Intra ···	Welcome to the team!
Teams	IT Administration 1	Here are some things to get going
	Employee Portal Mobile ··· !	
	HR Human Resource 2	Add members to Sales
	s Sales ····	Start typing a name, distribution list, or mail enabled security group to add to your team.
	General Clients Service Finance Review	Start typing a name or group Add
	Forecast and Analysis ! Monthly Reports	FAQ
		Close
		February 28, 2019 Image: Separation of the
		 Miriam Graham has created channel Pipeline. Hide channel Megan Bowen has created channel Southwest BD Region. Hide channel
	టి⁺ Join or create a team త్ర	Start a new conversation. Type @ to mention someone. $A_{\mathscr{U}} \otimes \mathbb{C} \oplus \mathbb{C}$

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.







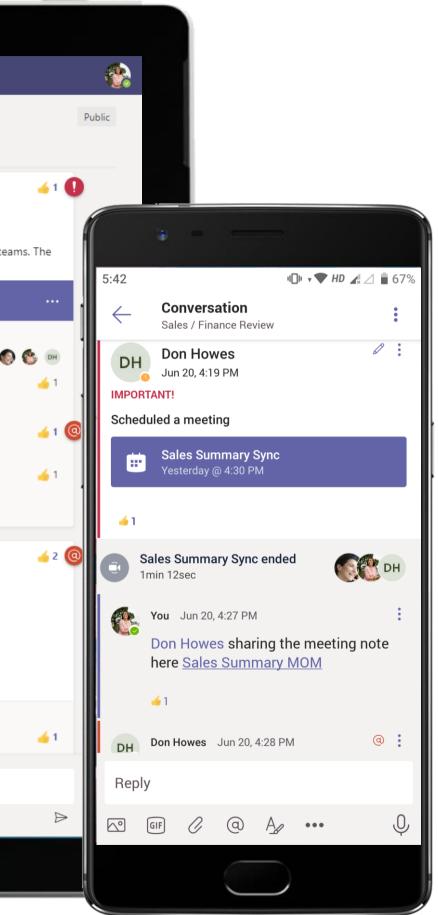
She receives a meeting invite for a sync call. With Microsoft Teams, you can easily schedule meetings and find the best available times for invitees through the native scheduling calendar.



		8
	Microsoft Teams	Search or type a command
Activity	Your teams Business Development ····	Sales > Finance Review ···· Conversations Files Wiki Meeting Notes New Sales Summary MOM New Quarterly Sales New +
Chat Feams	RFP Response - Client X Intra ···	Don Howes 4:19 PM Edited IMPORTANT! Sales Summary Sync Hi All, The finance team is in the process of creating the quarterly P&L statement. We are looking for inputs from sales and marketing te
Meetings Files	EP Employee Portal Mobile ··· ! HR Human Resource ··· 2	intent of this meeting is to outline what we need from the respective teams. Look forward to talking more then. Sales Summary Sync Thursday, June 20, 2019 @ 4:30 PM
	s Sales General Clients Service	Collapse all Q Sales Summary Sync ended: 1m 12s Joni Sherman 4:27 PM Don Howes sharing the meeting note here Sales Summary MOM
	Finance Review Forecast and Analysis Monthly Reports	Don Howes 4:28 PM Thanks Joni Sherman. As discussed, please let me know the POC for the sales report? Image: Sherman 4:28 PM Image: Very Sherman 4:28 PM <t< th=""></t<>
		Christie Cline 4:33 PM IMPORTANT! Sales Summary for Finance Hi Don Howes, please find attached the sales summary for the past quarter. CC: Joni Sherman Image: Christie Cline 4:33 PM Image: Christie Cline 4:33 PM <td< td=""></td<>
Get app		Collapse all Don Howes 4:38 PM Thank you Christie Cline This looks great!
Store	ະວໍ ⁺ Join or create a team 🔅	Start a new conversation. Type @ to mention someone. A 🖉 🖉 😳 💷 😳 🤤 ••••

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.





	Microsoft Teams	C	Search or type a command	(
L Activity	Your teams		Sales > Finance Review	Public
Ę	Business Development		Conversations Files Wiki Meeting Notes 🗤 Sales Summary MOM 🗸 Quarterly Sales 🕬 🕂	
Chat	RR RFP Response - Client X In	tra •••	N OneNote Online - Saved	0
ams	IT Administration	0	File Home Insert Draw View Help Open in OneNote	
etings	EP Employee Portal Mobile	!	$ \bigcirc \checkmark \ \bigcirc \ \bigcirc$	√
4 iles	HR Human Resource	2	Sales Summary 03/05	
	s Sales		Thursday, June 20, 2019 4:26 PM	
	General			
	Clients Service		1) Sales Volume by channel	
	Finance Review		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	
	Forecast and Analysis	1	pulling in the most revenue.	
	Monthly Reports		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	1
			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 <u>sales cycles</u> , 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	
			HERE ARE THE DEFINITIONS OF WHAT WILL POPULATE IN YOUR SALES SUMMARY REPORT:	
			Date Date the order was placed. (MM/DD/YYYY)	
			Website The website the order took place on.	
þ			Type Type of order. (Website/ <u>ClubOrder/AdminPanel</u>)	
app			Count The number of orders.	
£			Sub Total The sub total of the order before tax, shipping etc.	
∐ ore			Deposit If there is a bottle deposit on product(s) *(Canadian customers only)	
2			Shipping Total amount of shipping.	
?) Help	ະຶ6⁺ Join or create a team	£\$3	Handling Total amount of handling.	

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.



2.

Sales Summary 03/05

Thursday, June 20, 2019 4:26 PM

1) Sales Volume by channel

e

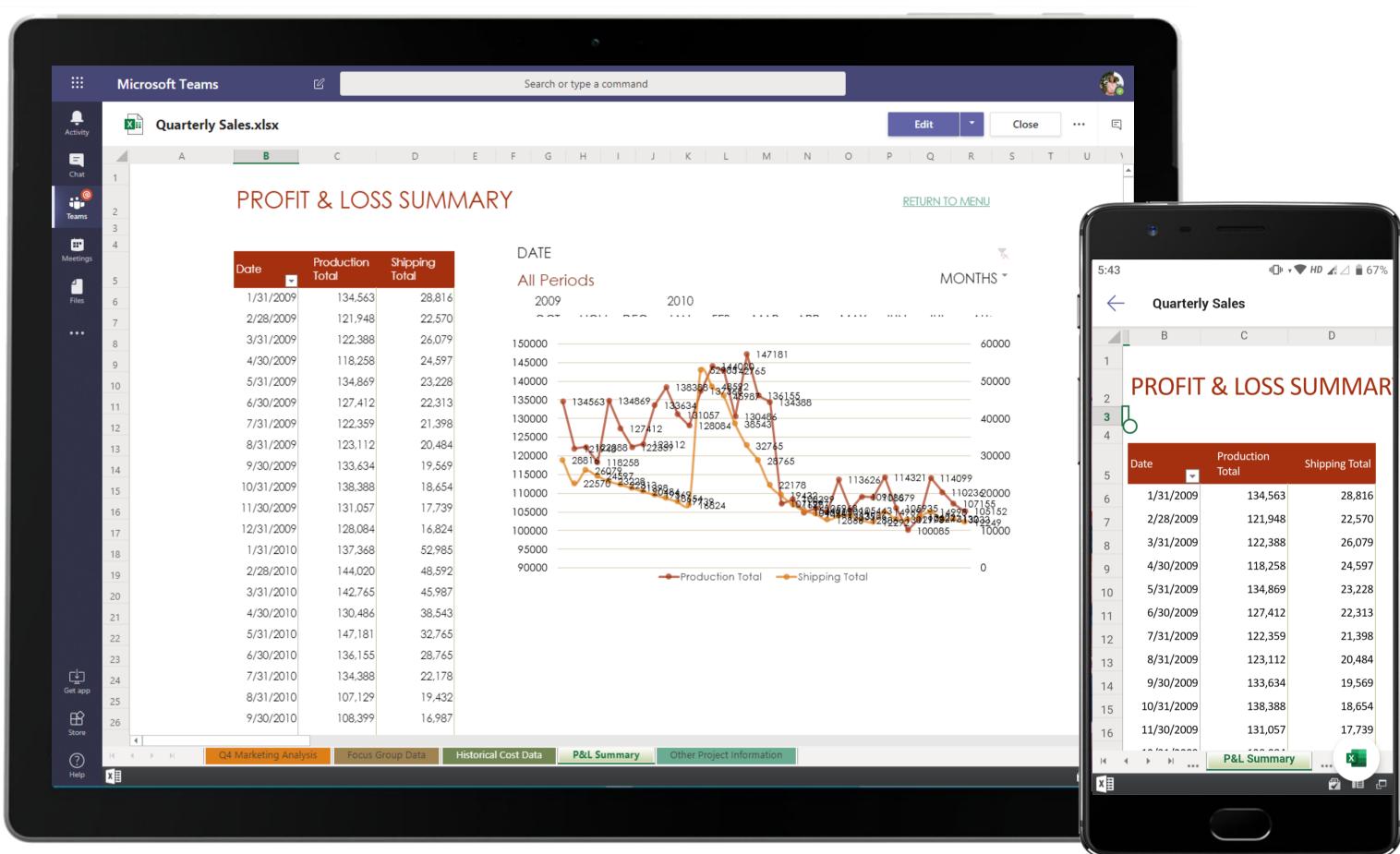
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This is a bit of a more "strategic" KPI that can also be used effectively on longer time scales. Essentially, this report shows you what physical areas and methods of customer acquisition are pulling in the most revenue.

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



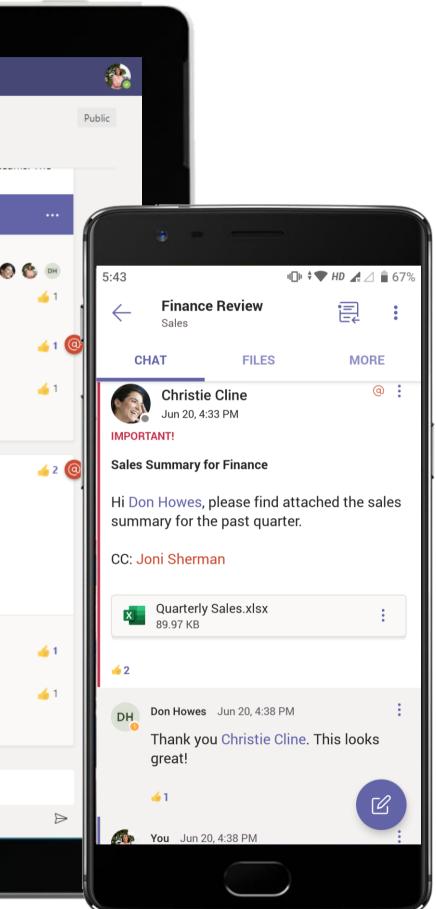
The Sales Executive uses Excel to build and present her data to the team. Create impactful summaries of crucial data with Excel, Word and OneNote for Microsoft Teams – deeply integrated in your workspace.



	Mi	crosoft Teams	Ľ	Search or type a command
L Activity	V	teams		Sales > Finance Review
	The second se	Business Development		Conversations Files Wiki Meeting Notes 🗤 Sales Summary MOM Quarterly Sales +
Chat		RFP Response - Client X Inte	ra •••	intent of this meeting is to outline what we need from the respective teams. Look forward to talking more then.
Teams		IT Administration	🕦	Sales Summary Sync Thursday, June 20, 2019 @ 4:30 PM
Meeting		Employee Portal Mobile	1	 Collapse all Q G G Sales Summary Sync ended: 1m 12s
Files	HR	Human Resource	🙆	Joni Sherman 4:27 PM Don Howes sharing the meeting note here Sales Summary MOM
	s	Sales		Don Howes 4:28 PM Thanks Joni Sherman. As discussed, please let me know the POC for the sales report?
		General		Joni Sherman 4:28 PM
		Clients Service Finance Review		Vive brought Lidia up to speed on your requirements, she will be your POC for this.
		Forecast and Analysis		← Reply
		Monthly Reports		Christie Cline 4:33 PM IMPORTANT! Sales Summary for Finance Hi Don Howes, please find attached the sales summary for the past quarter. CC: Joni Sherman Image: Christie Cline 4:33 PM Image: Christie Cline 4:33 PM
Get apg				 Collapse all Don Howes 4:38 PM Thank you Christie Cline. This looks great! Joni Sherman 4:38 PM Don Howes, hope this works. Please feel free to reach out if you have any more questions. <i>C</i> Reply
Store	Contraction of the second			Start a new conversation. Type @ to mention someone.
? Help	°°°	Join or create a team	ŝ	

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?



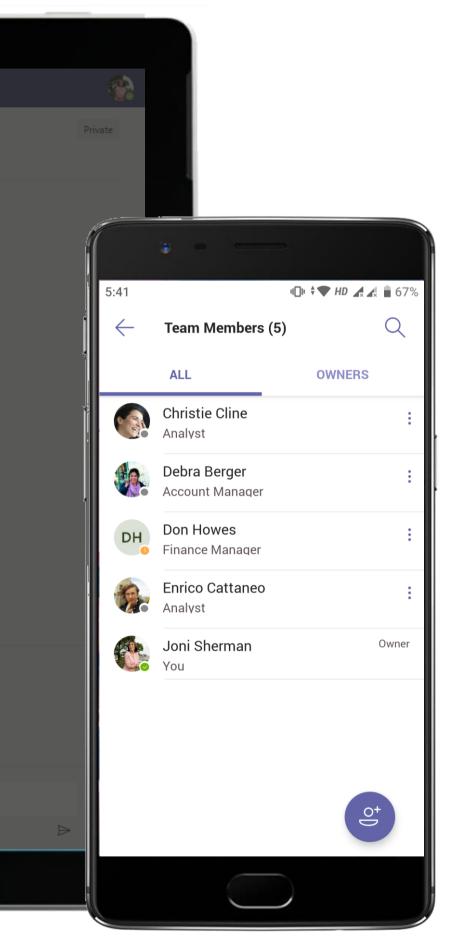
PowerPoint

Sales - Directing the Employee Path to Expertise

	Microsoft Teams 🛛	Search or type a command
Activity	Your teams Business Development ····	Business Development > General … Conversations Files +
Chat	RR RFP Response - Client X Intra ···	Welcome to the team!
Teams	IT Administration 1	Here are some things to get going
	Employee Portal Mobile ··· ! Human Resource ··· 2	Add members to Sales
	s Sales ····	Start typing a name, distribution list, or mail enabled security group to add to your team.
	General Clients Service Finance Review Forecast and Analysis ! Monthly Reports	Start typing a name or group Add
		Close February 28, 2019 Megan Bowen has created channel Central BD Region. Hide channel Miriam Graham has created channel Leadership Team. Hide channel Megan Bowen has created channel Northwest BD Region. Hide channel Miriam Graham has created channel Pipeline. Hide channel Megan Bowen has created channel Southwest BD Region. Hide channel
? Help	ిది ⁺ Join or create a team 🔅	Start a new conversation. Type @ to mention someone. $A_{\mathscr{A}} \oslash \bigoplus \bigoplus \bigoplus \bigoplus \bigoplus \bigoplus \bigoplus$

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.

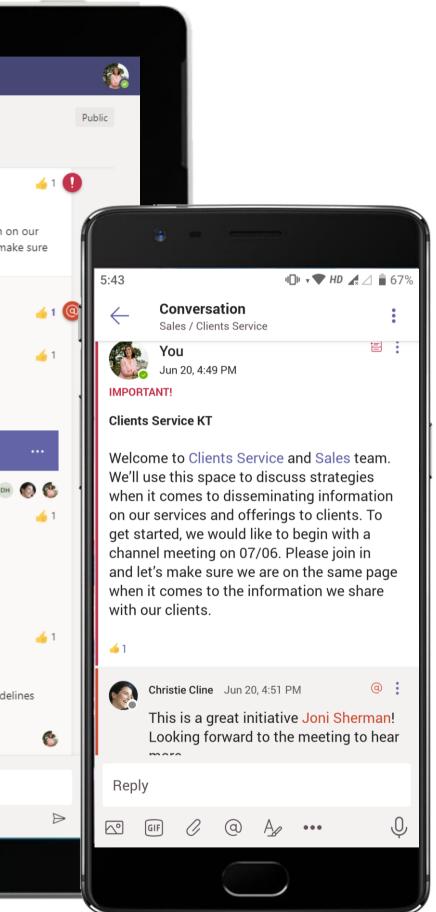




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				S	
	Microsoft Teams	C		Search or type a command	
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9	Business Development		Conversations	Files Wiki Meeting Notes New Clients Service Team Tr New +	
Chat	RFP Response - Client X Intra		IMPOR	Sherman 4:49 PM DRTANT! ents Service KT	
Teams	IT Administration	🛈	Welco	come to Clients Service and Sales team. We'll use this space to discuss strategies when it comes to disseminating inforr ices and offerings to clients. To get started, we would like to begin with a channel meeting on 07/06. Please join in and	
Meetings	EP Employee Portal Mobile	··· !		are on the same page when it comes to the information we share with our clients.	
Files	HR Human Resource		✓ Collaps	Christie Cline 4:51 PM	
	General			This is a great initiative Joni Sherman! Looking forward to the meeting to hear more.	
	Employee Engagement Employee Referrals			Joni Sherman 4:55 PM Edited Clients Service KT	
	Planning			Clients Service Team Training.pptx ····	
	Review	! 0			
	Training	1		Clients Service KT Thursday, June 20, 2019 @ 5:00 PM	
	s Sales		Ū.	Clients Service KT ended: 2m 13s	Dł
	General			5:00 PM Edited	
	Clients Service			 Hi All, sharing a few key points we discussed today: Recently updated Contoso policies 	
	Finance Review Forecast and Analysis			Guidelines for Customer Service Reps	
	Monthly Reports			Updated airline safety protocols	
	<i>·</i> · ·			<u>See less</u>	
			•	Christie Cline 5:00 PM Are these guidelines available in the corporate portal?	
1				Joni Sherman 5:01 PM These guidelines have recently cleared legal approval, but they are still under review. We will be posting the update soon in this channel as soon as we receive a final thumbs up from leadership!	ed guide
Get app			Ū.		
ŧŶ					
Store			Start a	a new conversation. Type @ to mention someone.	
? Help	ిం ⁺ Join or create a team	(2)	Ar c		

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.



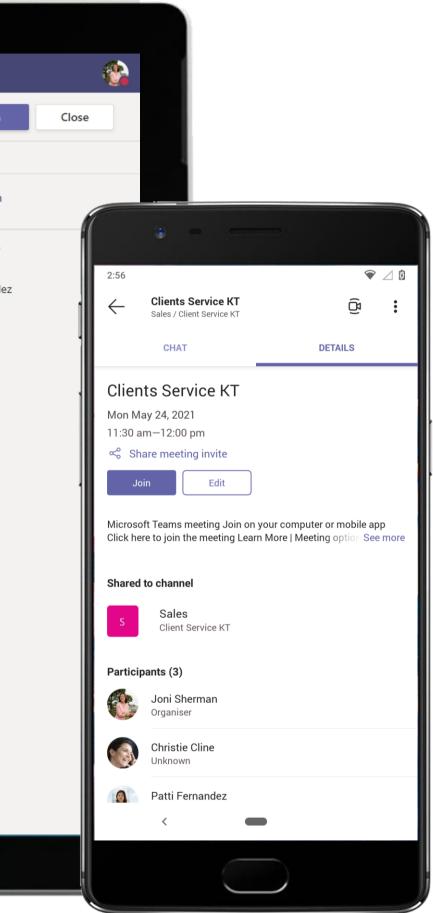


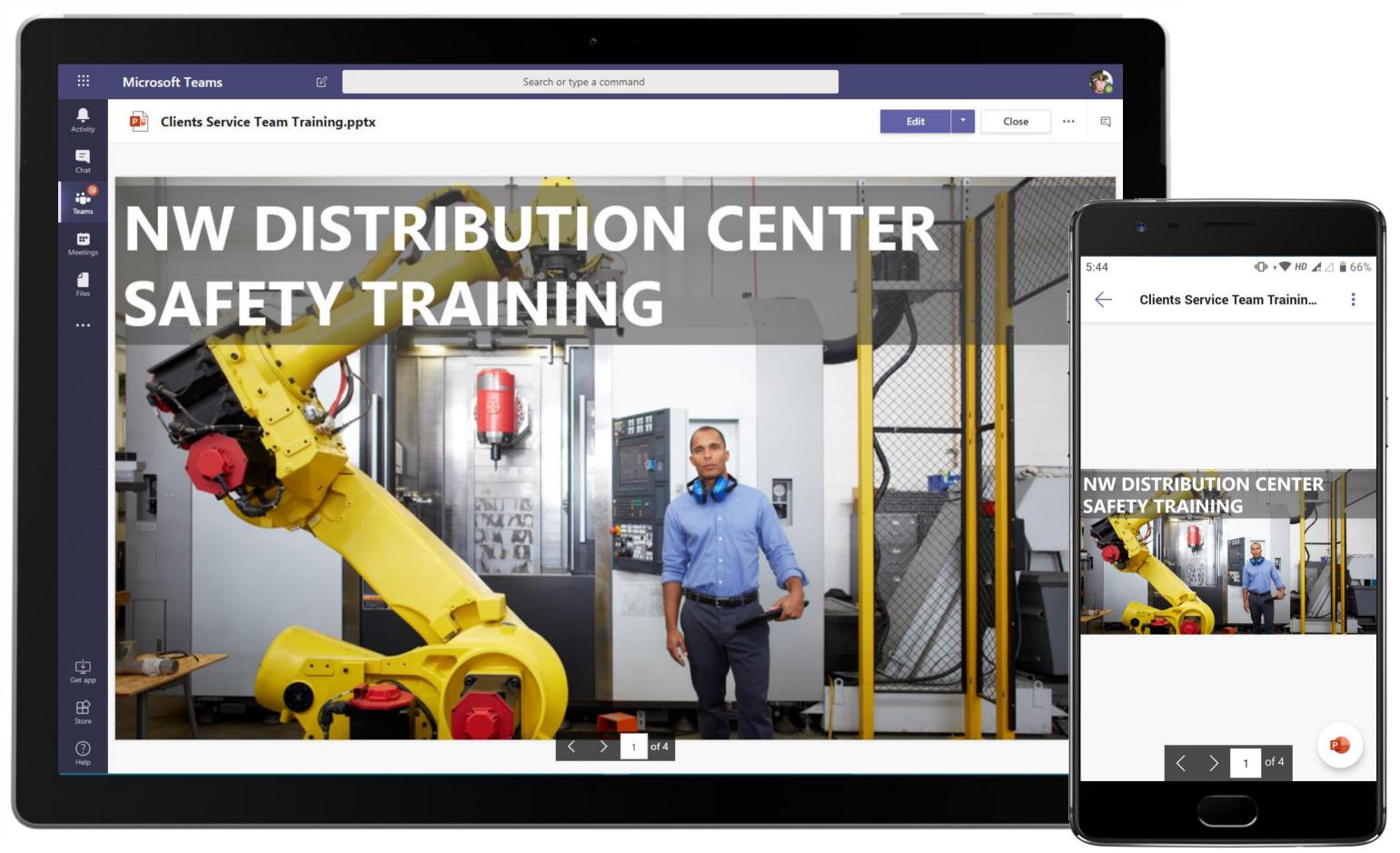
Sales - Directing the Employee Path to Expertise

	Micros	soft Teams Q Search	
Q Activity		Clients Service KT Chat Details Scheduling Assistant	Join
(=) Chat	\times c	Cancel meeting 🕞 Copy link Time zone: (UTC+05:30) Chennai, Kolkata, Mumbai, New Delhi Meeting options …	Tracking
(ij) Teams	0	Clients Service KT	Joni Sherman Organizer
Calendar	CO CO	Christie Cline × Patti Fernandez × + Optional	Christie Cline Unknown
Galls	Ŀ	5/24/2021 11:30 AM \checkmark \rightarrow 5/24/2021 12:00 PM \checkmark 30m All day	Patti Fernande Unknown
		Suggested: 8:30 PM-9:00 PM 9:00 PM-9:30 PM 9:30 PM-10:00 PM	
Files	¢	Does not repeat V	
	=	Sales > Client Service KT	
	\odot	Add location	
	. <u>=</u>	B I U S ∀ A A Paragraph ∨ Ab ⊕ ⊕ ∷	
		Microsoft Teams meeting	
		Join on your computer or mobile app	
		Click here to join the meeting	
BÊ		Learn More Meeting options	
Apps			
? Help			
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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.







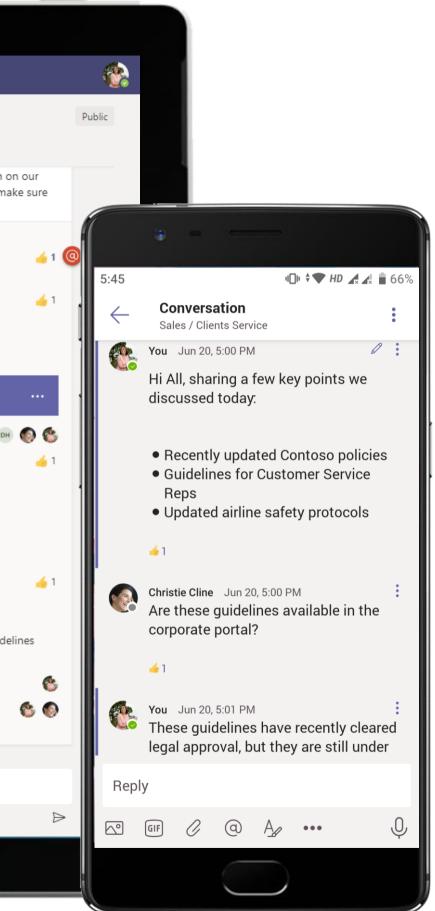
Create and share PowerPoint presentations over a Teams call to make meetings meaningful and to offer attendees a visual representation of key points covered.



	Microsoft Teams	2	Search or type a command	
L Activity	Your teams Business Development		Sales > Clients Service	
Chat Chat	RFP Response - Client X Intra		Conversations Files Wiki Meeting Notes New Clients Service Team Tr New + Welcome to Clients Service and Sales team. We'll use this space to discuss strategies when it comes to disseminating informatio services and offerings to clients. To get started, we would like to begin with a channel meeting on 07/06. Please join in and let's we are on the same page when it comes to the information we share with our clients.	
Meetings		•• 0	 Collapse all Christie Cline 4:51 PM This is a great initiative Joni Sherman! Looking forward to the meeting to hear more. 	
Files	HR Human Resource General Employee Engagement		Soni Sherman 4:55 PM Edited Clients Service KT Clients Service Team Training.pptx ····	
	Employee Referrals Planning	1	Clients Service KT Thursday, June 20, 2019 @ 5:00 PM	
	Review Training Sales General Clients Service	1	 Clients Service KT ended: 2m 13s 5:00 PM Edited Hi All, sharing a few key points we discussed today: Recently updated Contoso policies Guidelines for Customer Service Reps Updated airline safety protocols 	DH
	Finance Review Forecast and Analysis Monthly Reports		See less Image: Christie Cline 5:00 PM Are these guidelines available in the corporate portal? Image: Joni Sherman 5:01 PM	
			Joni Sherman 5:01 PM These guidelines have recently cleared legal approval, but they are still under review. We will be posting the updated gu soon in this channel as soon as we receive a final thumbs up from leadership! Q Meeting ended: 7s Q Meeting ended: 26s	ide
Get app			← Reply	
Store			Start a new conversation. Type @ to mention someone.	
? Help	ະວີ ⁺ Join or create a team	\$		

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.



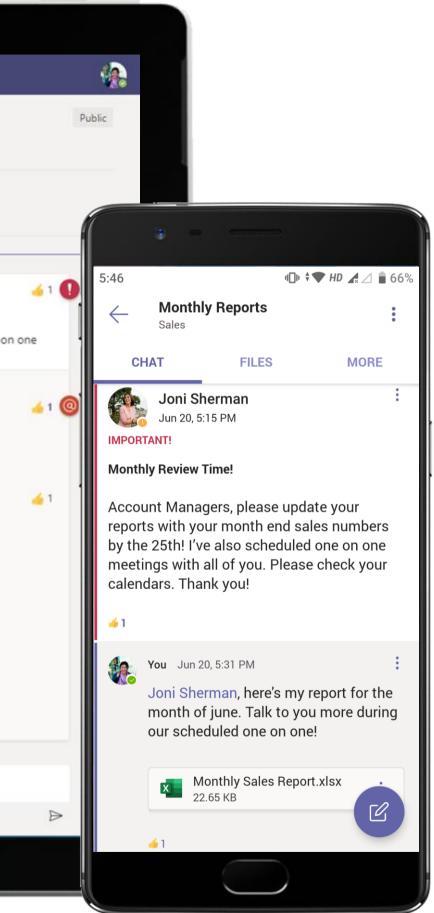
Which app integrations on Teams made it possible?



	Microsoft Teams	C	Search or type a command
Activity	EP Employee Portal Mobile App General		Sales > Monthly Reports Conversations Files Wiki +
Chat	App Review and Delivery		
1	Daily Stand-Up		Planner OneNote Website Add tab
Teams	Engineering and Development	t	June 20, 2019
•	Pull Requests		Last read
Aeetings	UX Design		Joni Sherman 6/20 5:15 PM
files	Human Resource		Monthly Review Time!
	General		Account Managers, please update your reports with your month end sales numbers by the 25th! I've also scheduled one
	Employee Engagement		meetings with all of you. Please check your calendars. Thank you!
	Employee Referrals	1	* Collapse all
	Employment Trend	0	Debra Berger 6/20 5:31 PM Joni Sherman, here's my report for the month of june. Talk to you more during our scheduled one on one!
	Planning		Som sherman, here's my report for the month of june. Take to you more during our scheduled one on oner
	Training	1	Monthly Sales Report.xlsx ···
	s Sales		Joni Sherman 6/20 5:31 PM Edited Sounds good!
	General		Sounds good!
	Clients Service		
	Finance Review		
	Forecast and Analysis	1	
	Monthly Reports		
	ss Safety and Security	0	
	New Operations (LA and Austi	in) •••	
¢	General		
Get app	Marketing		
B	Operations		
Store			Start a new conversation. Type @ to mention someone.
(?) Help	ະຄ* Join or create a team	ଭ	

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.





Sales - Preparing for a Monthly Review

(5) vity	Monthly Sale	es Report.xlsx						Edit 🔻	Close	(Ę	
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	Company A	2,223,000.00	117,000.00	1,872,000.00	2,059,200.00	107.9545455	-351000	-386100				
	Company A	2,223,000.00	117,000.00	1,872,000.00	2,059,200.00	107.9545455	-351000	-386100				
	Company B	2,318,000.00 2,318,000.00	122,000.00 122,000.00	1,952,000.00 1,952,000.00	2,147,200.00 2,147,200.00	107.9545455 107.9545455	-366000 -366000	-402600 -402600				
	Company B Company B	1,472,500.00	77,500.00	1,240,000.00	1,364,000.00	107.9545455	-300000	-255750				
0	Company C	4,664,500.00	245,500.00	3,928,000.00	4,320,800.00	107.9545455	-736500	-810150		6:0	3	4 le 🗘 🕈 HD 🖌
9	Company C	6,103,750.00	321,250.00	5,140,000.00	5,654,000.00	107.9545455	-963750	-1060125				
²⁵ 10	Company C	2,979,200.00	156,800.00	2,508,800.00	2,759,680.00	107.9545455	-470400	-517440			 Monthly Sales 	s Report.xlsx
• 11												
• 12											A	В
13										1	Account	TY YTD Revenue
14 15										2	Company A	4,664,500
16										3	Company A	2,223,000
17										4	Company A	2,223,000
18										5	Company B	2,318,000
19										6	Company B	2,318,000
20										7	Company B	1,472,500
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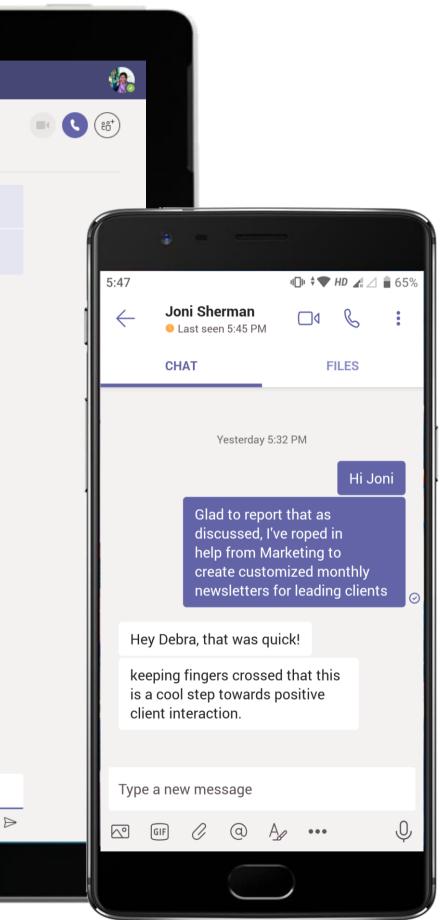
The Account Manager submits her report in the channel using Excel. This spreadsheet is stored in a cloud-enabled repository with Files.



				5	
	Microsoft Teams 🛛		Se	arch or type a command	
الم Activity	Recent Contacts	💽 Joni Sł	nerman		
E Chat	Recent Planner 6:22 PM	Conversation File	es Organization	Activity +	
iiii Teams	Planner 6:22 PM Task "Retrieve Data Sets" 5:36 PM Image: Set the set of the set				5:32 PM Hi Joni
•	Suggested			Glad to report that as discussed, I've roped in help from Marketing to create custom newsletters for leading clients	nized monthly
Meetings	🏧 Assistant @ Zoom.ai	(As	Joni Sherman 5:		
Files	Christie Cline	₩ ∂	Hey Debra, tha	t was quick! s crossed that this is a cool step towards positive client interaction.	
	Diego Siciliani		155		
	Emily Braun				
	Grady Archie Grady Henrietta Mueller				
	Irvin Sayers				
	Saiah Langer				
	Johanna Lorenz				
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¢	MA MOD Administrator				
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Store	Restor Wilke		Type a new me	ssage	
? Help	🔑 Patti Fernandez		A₂ Ø ☺		

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?







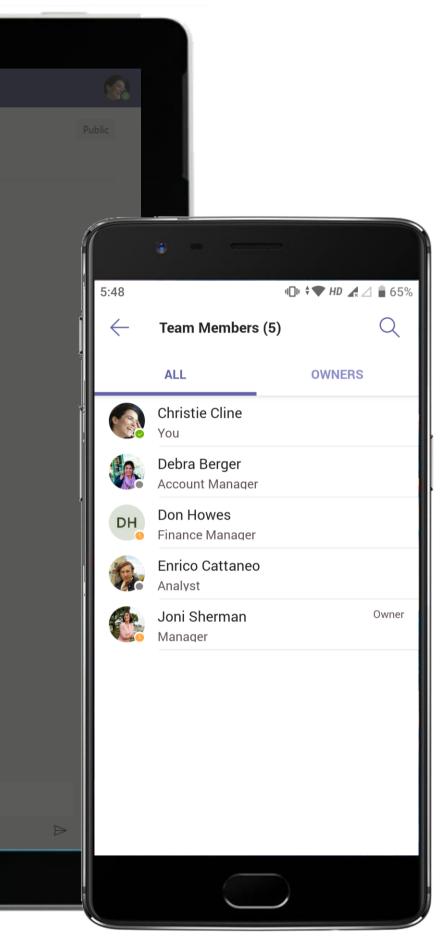


PowerPoint monday.com

			ð
	Microsoft Teams		Search or type a command
	Your teams		Sales > General ···
	Contoso Company West Regi		Conversations Files Wiki +
	Contoso Company Cloud Mana		Welcome to the team!
	Northwind Cloud		Here are some things to get going
Meetings	Finance ··· !	0	
	HR Human Resource		Create a channel for "Sales" team Channel name
	s Sales		Letters, numbers, and spaces are allowed
	General		Description (optional)
	Finance Review		Help others find the right channel by providing a description
			Cancel Add Cance Add
			Start a new conversation. Type @ to mention someone.
? Help	ిం ⁺ Join or create a team	¢۶	

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.

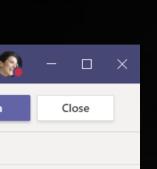




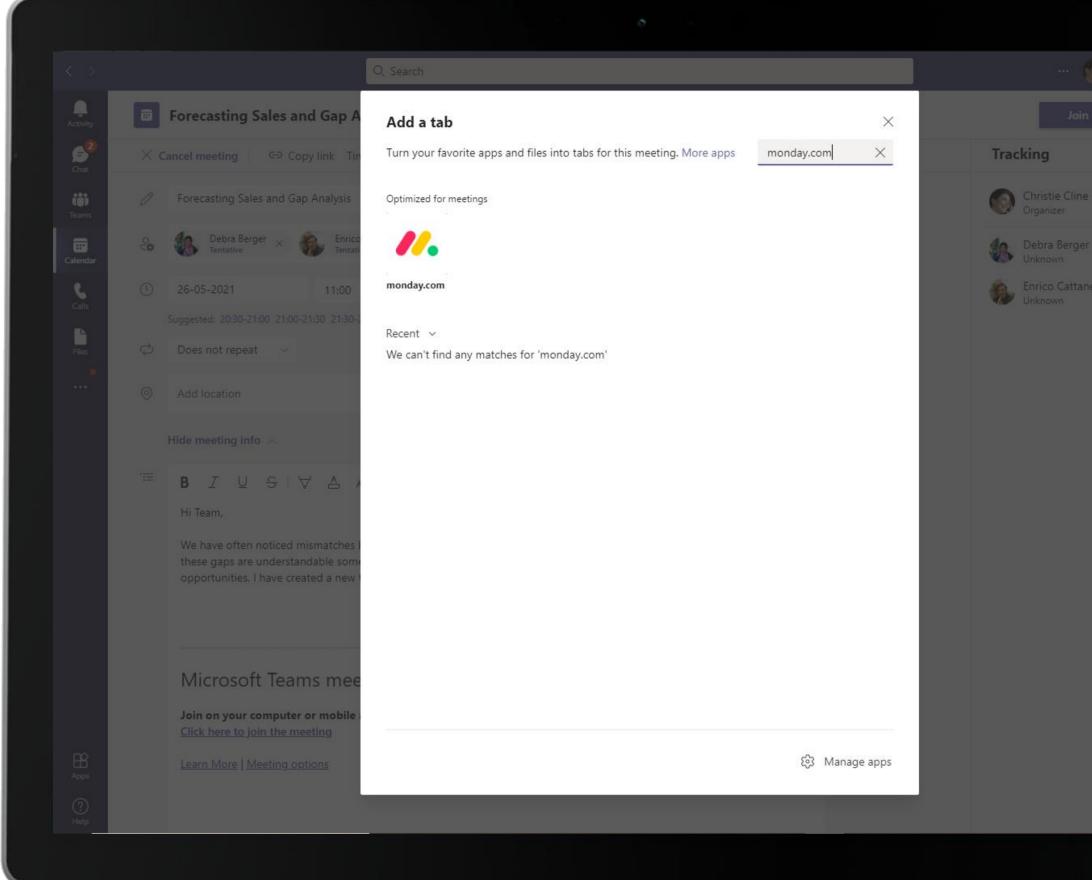
<pre>></pre>		Q Search		(
D tivîty		Forecasting Sales and Gap Analysis Chat Files Details Scheduling Assistant Meeting notes Whiteboard	+	Join
<mark>2</mark> hat	imes c	ancel meeting 🕞 Copy link Time zone: (UTC+05:30) Chennai, Kolkata, Mumbai, New Delhi 🗸 Meeting options \cdots		Tracking
ms	0	Forecasting Sales and Gap Analysis		Christie Cline Organizer
	O	Debra Berger × S Enrico Cattaneo × + Optional		Debra Berger Unknown
	Ŀ	26-05-2021 11:00 \checkmark \rightarrow 26-05-2021 11:30 \checkmark 30m \bullet All day		Enrico Cattan Unknown
		Suggested: 20:30-21:00 21:00-21:30 21:30-22:00		
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	. <u>.</u> =	B I U S ∀ A A Paragraph ∨ Ab ⊂ ⊂ ≡ ≦ 1 99 ☉ E ⊞ 9 ℃ Hi Team, We have often noticed mismatches between forecasts and the outcome. Given external causes that could have been factored in, these gaps are understandable sometimes, but they need to be identified and bridged to ensure we do not miss business opportunities. I have created a new team to capture these gaps. Scheduling this meeting to discuss more. Microsoft Teams meeting		
		Join on your computer or mobile app <u>Click here to join the meeting</u>		
		Learn More Meeting options		
Ì				
} ∞				

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.





VO 4G ITE 11:31 \times Edit event \checkmark D Forecasting Sales and Gap Analysis ° € Add participants **Christie Cline** . 3 Busy Debra Berger 68 \times Tentative Enrico Cattaneo P \times Tentative ╚ All day Wed, 26 May, 2021 11:00 Wed, 26 May, 2021 11:30 Free: May 26 20:30, 21:00, 21:30, 22:00 \odot Location 6 Show as Busy



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.

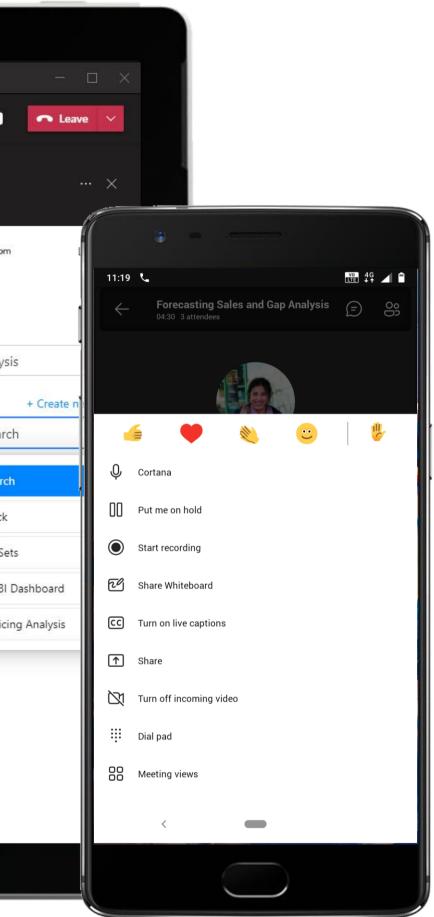


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		Forecasting Sales and Gap Analysis			
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Debra Berger 🔌		Enrico Cattaneo 🔌			

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.

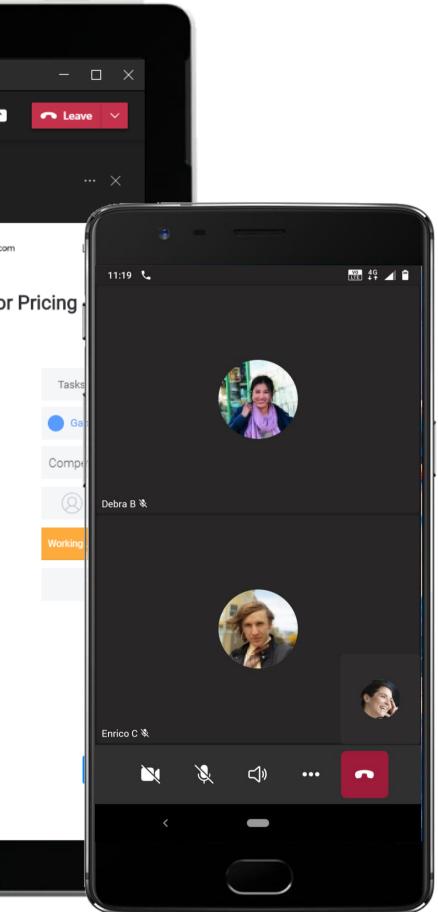




	Forecasting Sales and Gap Analysis				
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Debra Berger 🔌	Enrico Cattaneo 🔌				

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.

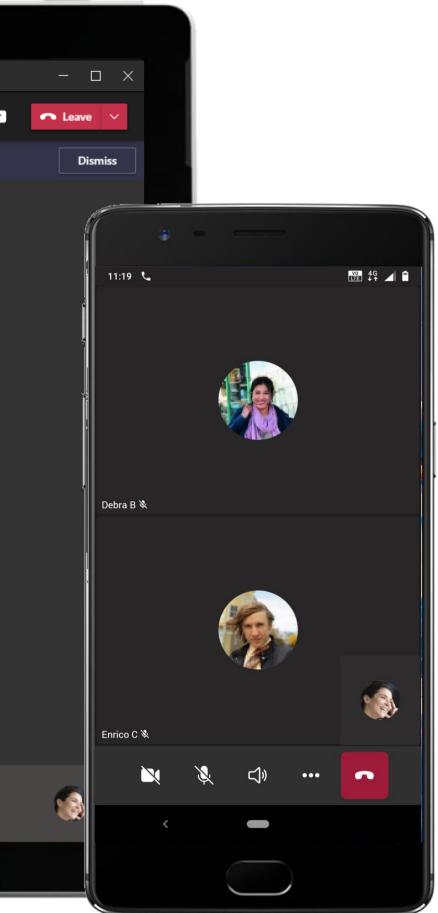




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10:19			000	Ē	٩	6)	 •••	×	Ļ
	▲ 5 minutes left in your schedu	uled meeting time.							

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.

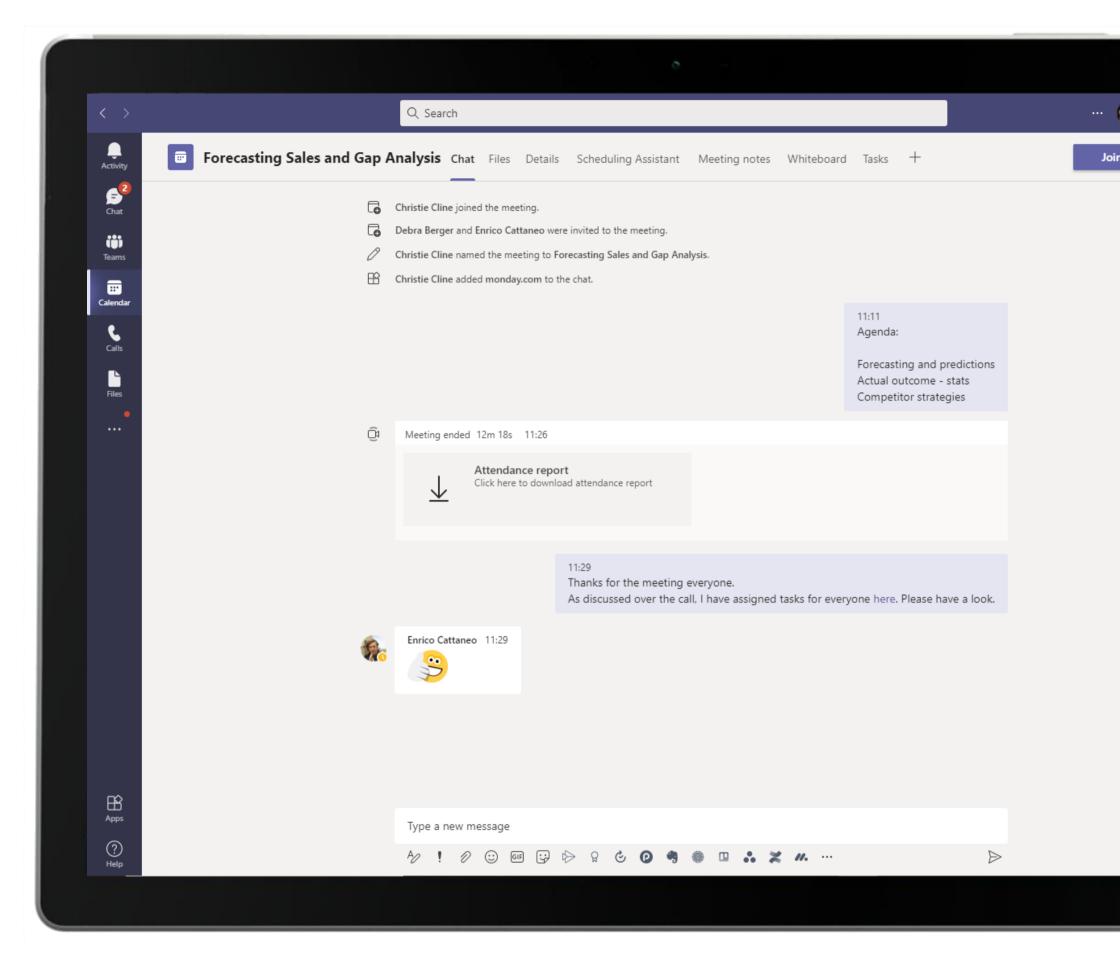




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L. Activity	Forecasting Sales and G	Gap Analysis Chat Files Details S	cheduling Assistant Meeting notes	Whiteboard Tasks +	Join Close	e
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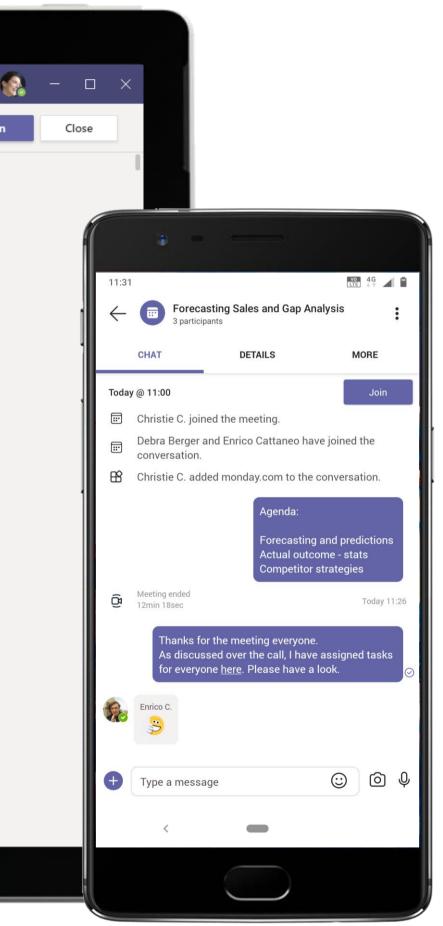
Create a new monday.com board or add to an existing one from directly within Microsoft Teams and easily visualize your team's work in one collaborative workspace.





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.

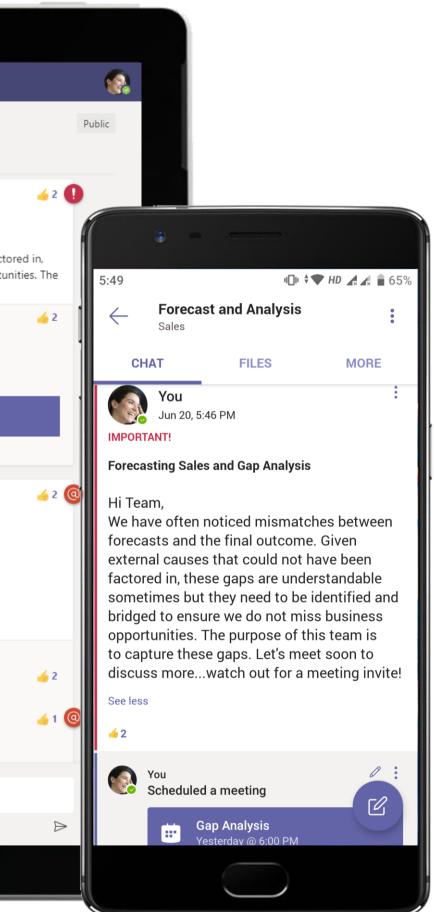




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Activity	Your teams		Sales > Forecast and Analysis …
E ¹	Contoso Company West Regi.		Conversations Files Wiki Meeting Notes New Tasks New +
Chat	Contoso Company Cloud Mana.	•••	Christie Cline 5:46 PM IMPORTANT!
Teams	Northwind Cloud		Forecasting Sales and Gap Analysis Hi Team,
Meetings 	F Finance	! 0	We have often noticed mismatches between forecasts and the final outcome. Given external causes that could not have been fac these gaps are understandable sometimes but they need to be identified and bridged to ensure we do not miss business opport purpose of this team is to capture these gaps. Let's meet soon to discuss morewatch out for a meeting invite!
Files	HR Human Resource		Christie Cline 5:47 PM Edited Agenda:
	s Sales		Forecast and predictions Actual outcome - stats
	General		Competitor Strategies
	Finance Review		Gap Analysis
	Forecast and Analysis 2 hidden channels		Thursday, June 20, 2019 @ 6:00 PM
	2 modell channels		← Reply
			Debra Berger 6:06 PM IMPORTANT! First Cut - Gap Analysis of Our key Service Areas Hi team, I have shared the initial draft of the Gap Analysis. Please take a look and update the sheet as you see fit. FYA - Christie Cline
			Gap Analysis.xlsx ····
			✓ Collapse all
			Christie Cline 6:12 PM Great work Debra Berger, looks good. Enrico Cattaneo can you get started on the PPT deck based on Annette's inputs?
Get app			Enrico Cattaneo 6:15 PM Edited Here you go Christie Cline, the PPT is done.
Ê			
Store			Start a new conversation. Type @ to mention someone.
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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.

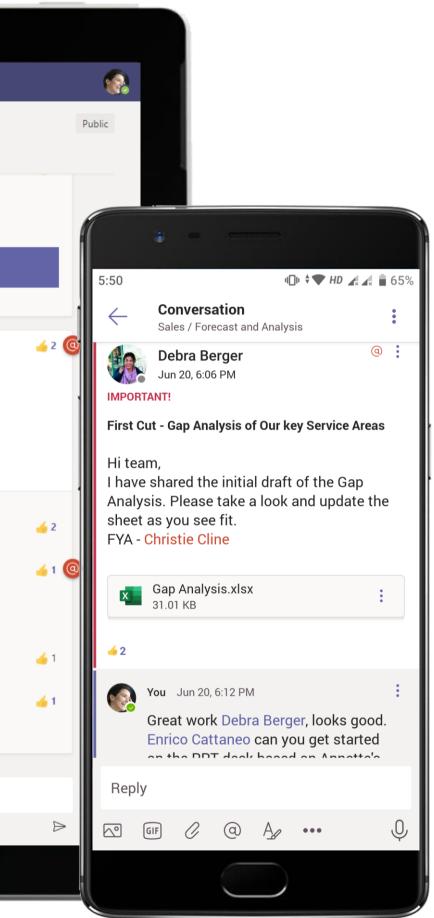




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Files	HR Human Resource		← Reply
•	s Sales		Debra Berger 6:06 PM IMPORTANT!
	General		First Cut - Gap Analysis of Our key Service Areas
	Finance Review		Hi team,
	Forecast and Analysis		I have shared the initial draft of the Gap Analysis. Please take a look and update the sheet as you see fit. FYA - Christie Cline
	2 hidden channels		Gap Analysis.xlsx ···
			 Collapse all Christie Cline 6:12 PM Great work Debra Berger, looks good. Enrico Cattaneo can you get started on the PPT deck based on Annette's inputs? Enrico Cattaneo 6:15 PM Edited Here you go Christie Cline, the PPT is done. Clients Analysis.pptx ····
			Christie Cline 6:16 PM Looks great! Could you create a slide with revenue data as well please?
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\sim			
Store			Start a new conversation. Type @ to mention someone.
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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.





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etings	6 Manhattan	17,000,000		\$595,000,000			Manhattan	20%	0%	15%						المعرية مختصص فتستعصرون في	
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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.

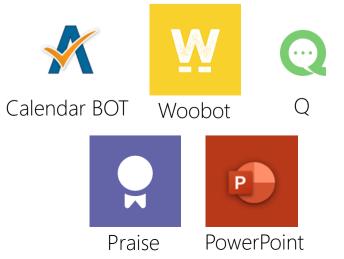
- Receives a news update regarding Contoso's effort to transform their workflow via Module Q digitally.
- Schedules a meeting and discusses potential chatbot solutions that Fabrikam AI could pitch to Contoso. •
- Reaches out to a representative from Contoso who expresses interest in the services via 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. •

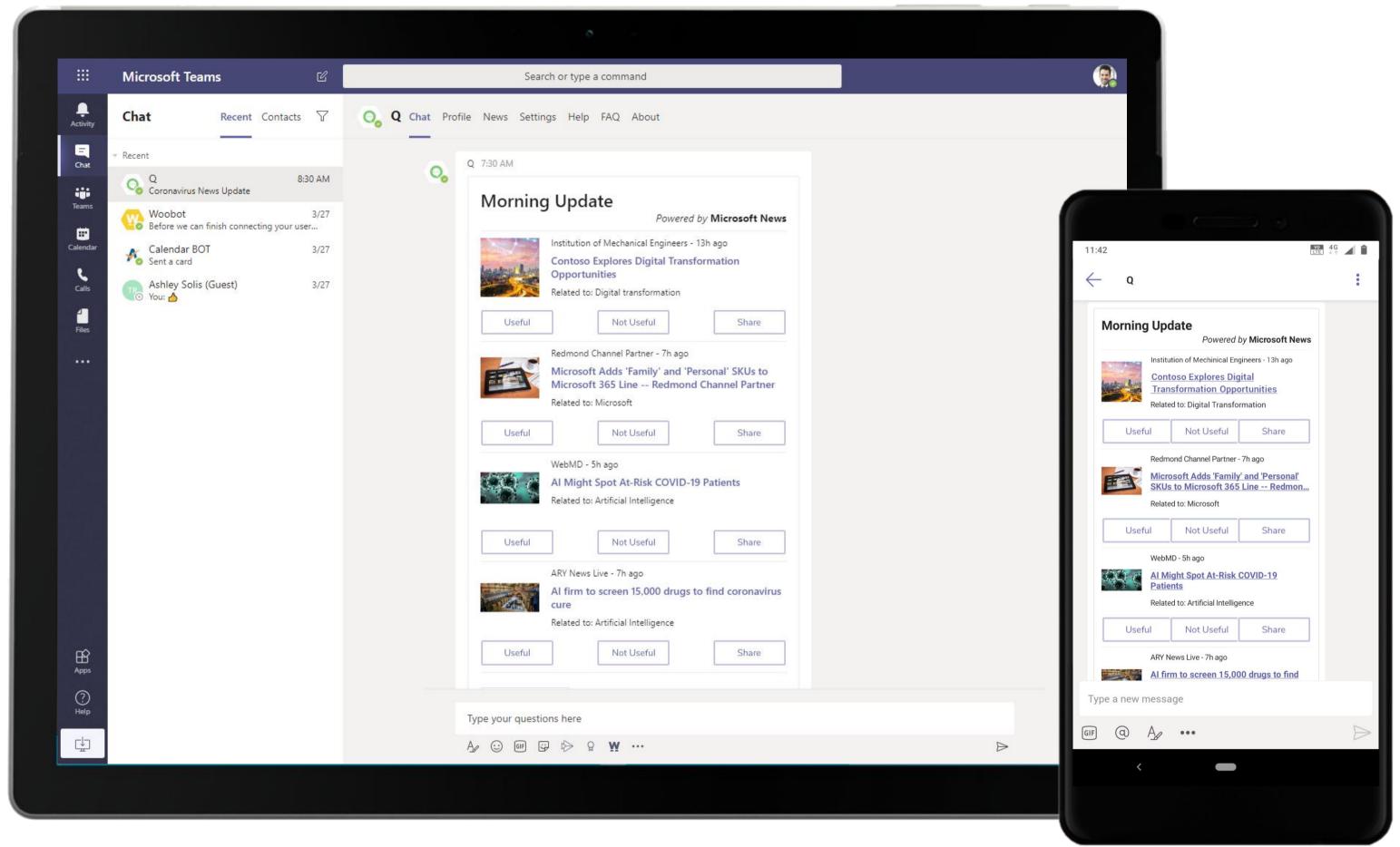
How did Microsoft Teams help the Sales Manager execute his roles and responsibilities?

- 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.



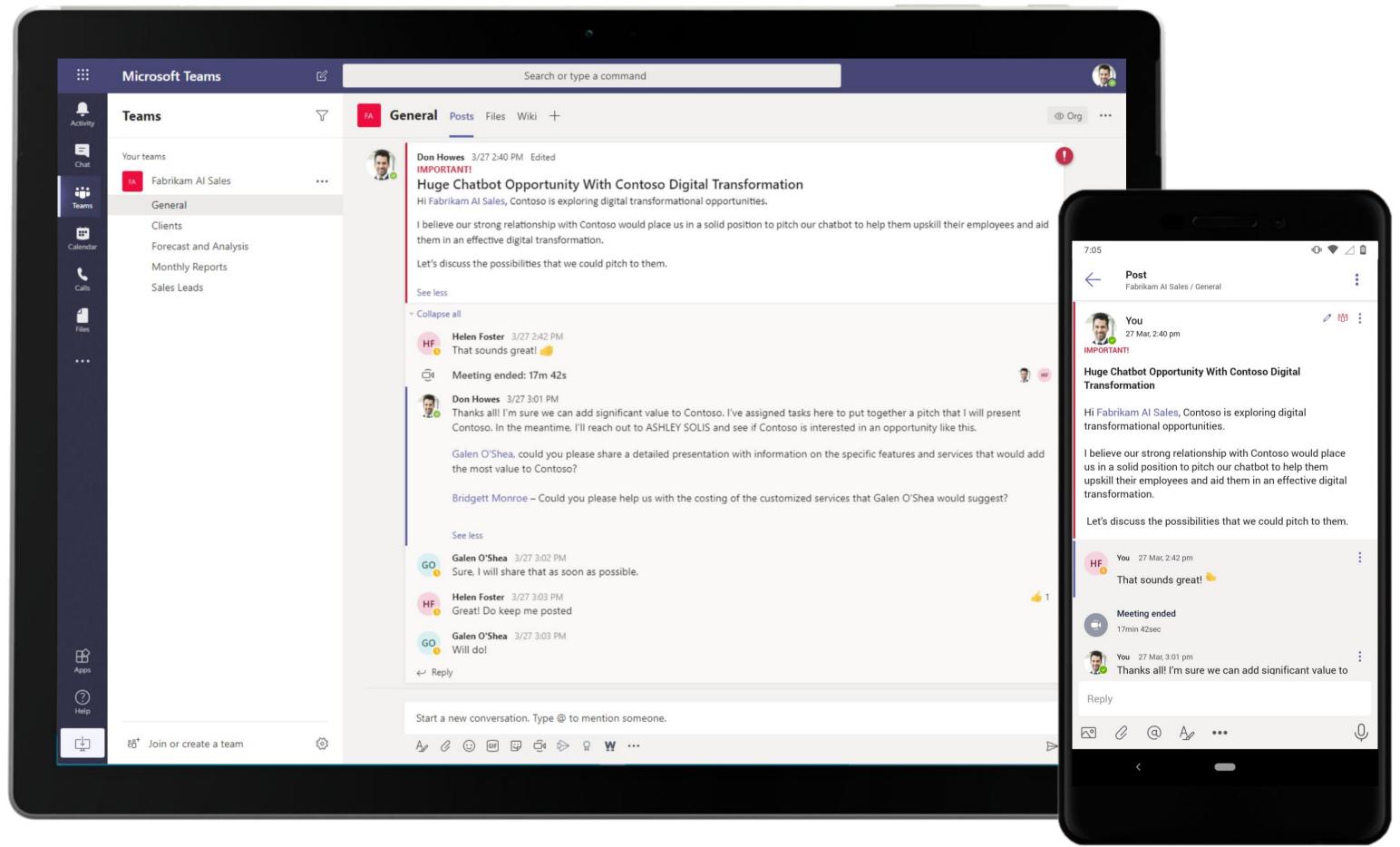
Which app integrations on Teams made it possible?





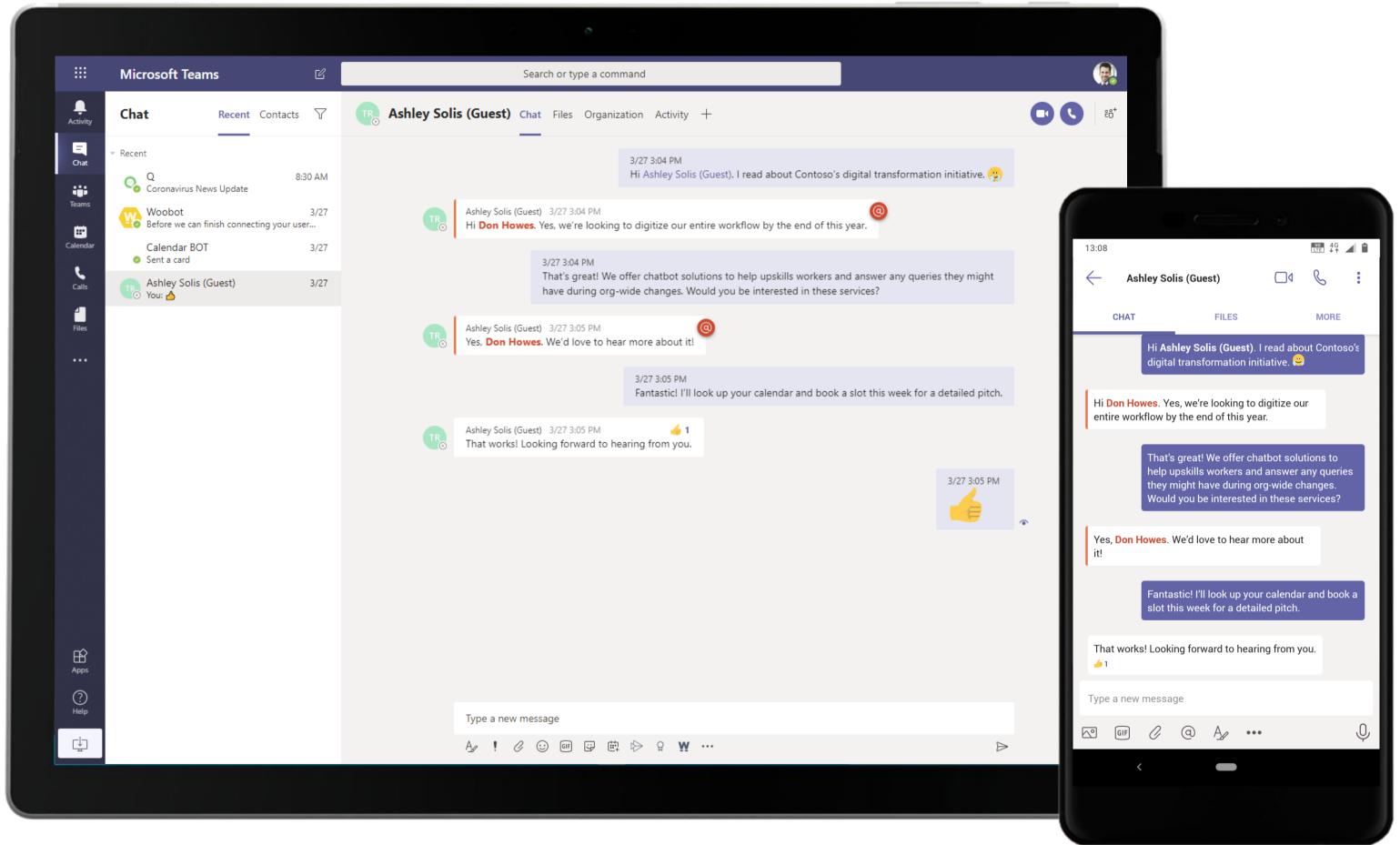
Model Q finds content relevant to your current priorities by scouring external and internal content sources, such as news, collateral, and experts. The Q bot delivers what you need in your chat feed.





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.



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				✓ Include Microsoft Teams meeting		Chatboat Solution Pitch description
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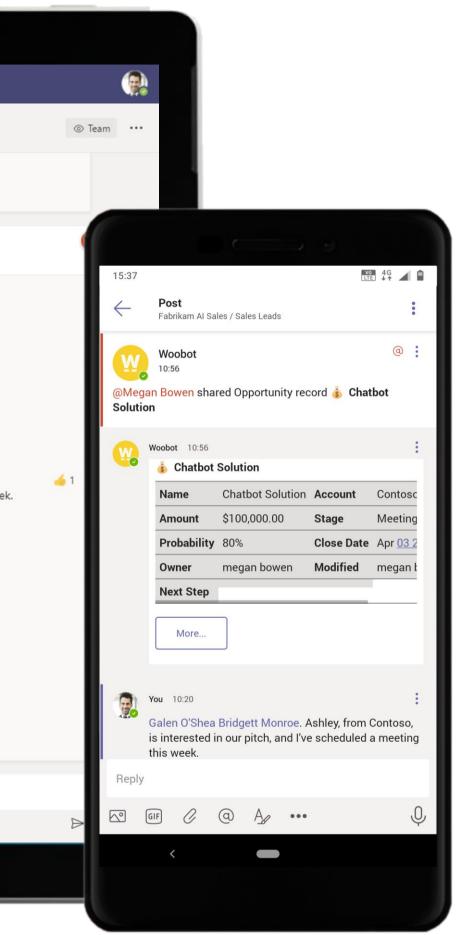
Compare open times on your calendar to open times on any of your Approved Contact's calendars using Calendar bot. The Sales Manager uses the bot to schedule meeting with Contoso representative.



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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.

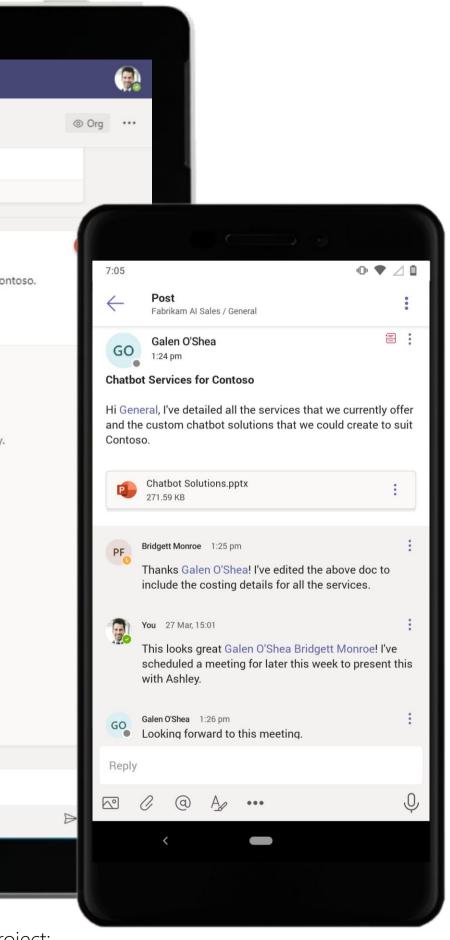




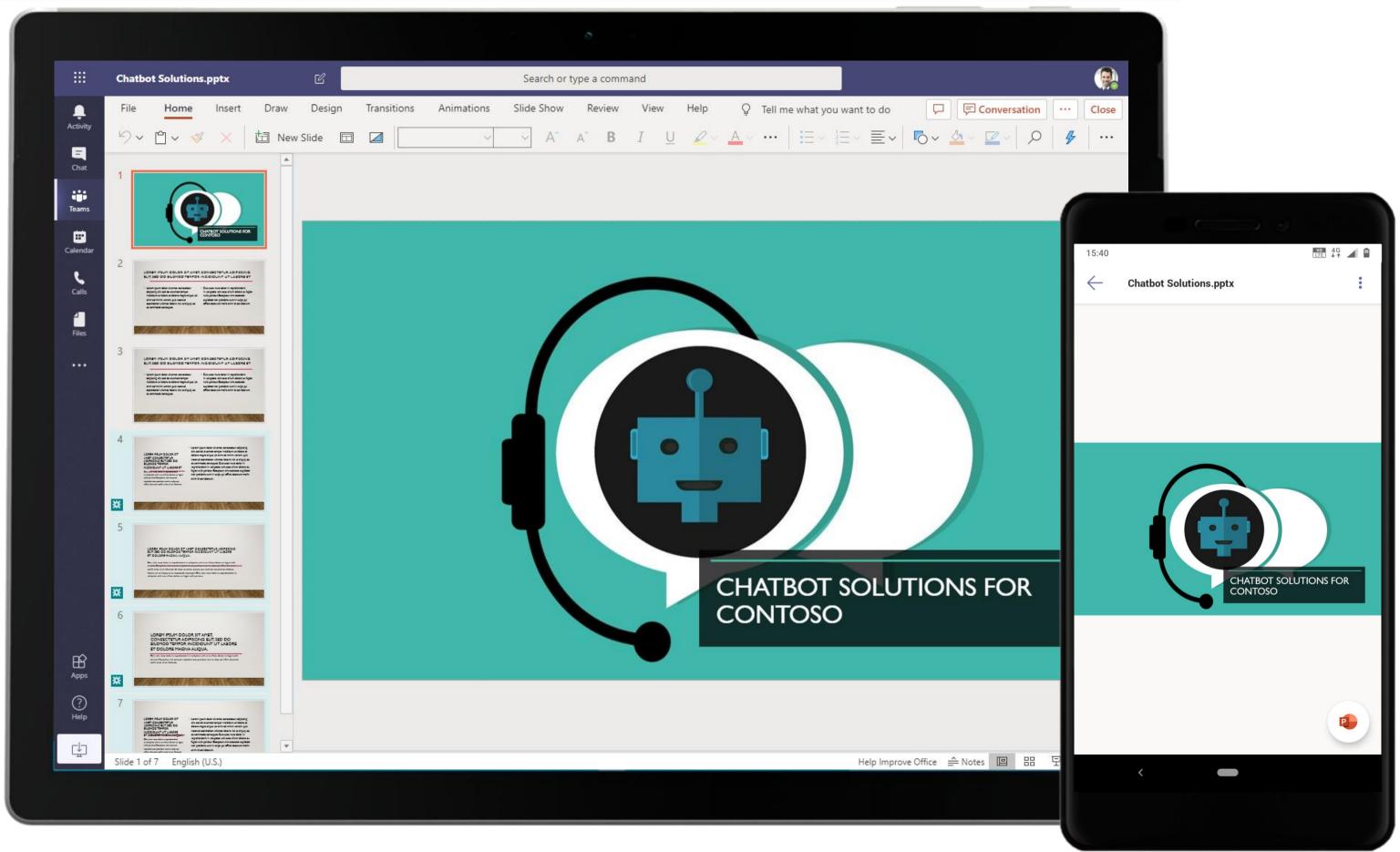
	Microsoft Teams	Ľ	Search or type a command
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Calendar Calls	Your teams Fabrikam AI Sales General Clients Forecast and Analysis Monthly Reports Sales Leads		See less * Reply Totay Colored Shee 1:24 PM Chatbot Services for Contoso H General, I've detailed all the services that we currently offer and the custom chatbot solutions that we could create to suit C Chatbot Solutions.pptx * Collapse al * Collapse al * Collapse al * Collapse al * Do Howes 1:25 PM Thanks Galen O'Shee I've edited the above doc to include the costing details for all the services. * Do Howes 1:25 PM This looks great Galen O'Shee Bridgett Monroel I've scheduled a meeting for later this week to present this with Ashle * General I've diffed Monroe 1:25 PM This looks great Galen O'Shee Bridgett Monroel I've scheduled a meeting for later this week to present this with Ashle * General I've diffed Monroe 1:25 PM * Collapse al I've scheduled a meeting for later this week to present this with Ashle * General I've diffed Monroe 1:25 PM * Collapse al I've scheduled a meeting for later this week to present this with Ashle * General I've al I've al I've al I've al I've scheduled a meeting for later this week to present this with Ashle * Collapse al I've
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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.





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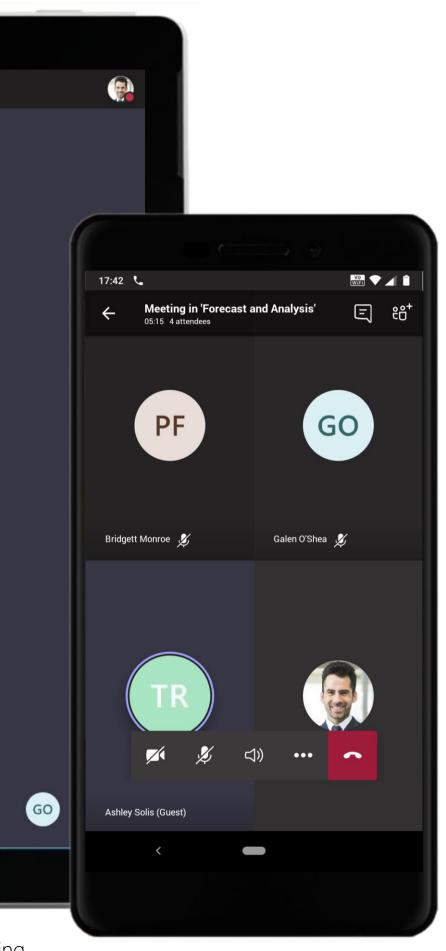
Store and share important files within a secure, cloud-enabled repository with Files. Informative documents such as the PowerPoint discussing chatbot solutions are housed here for the team's easy access.

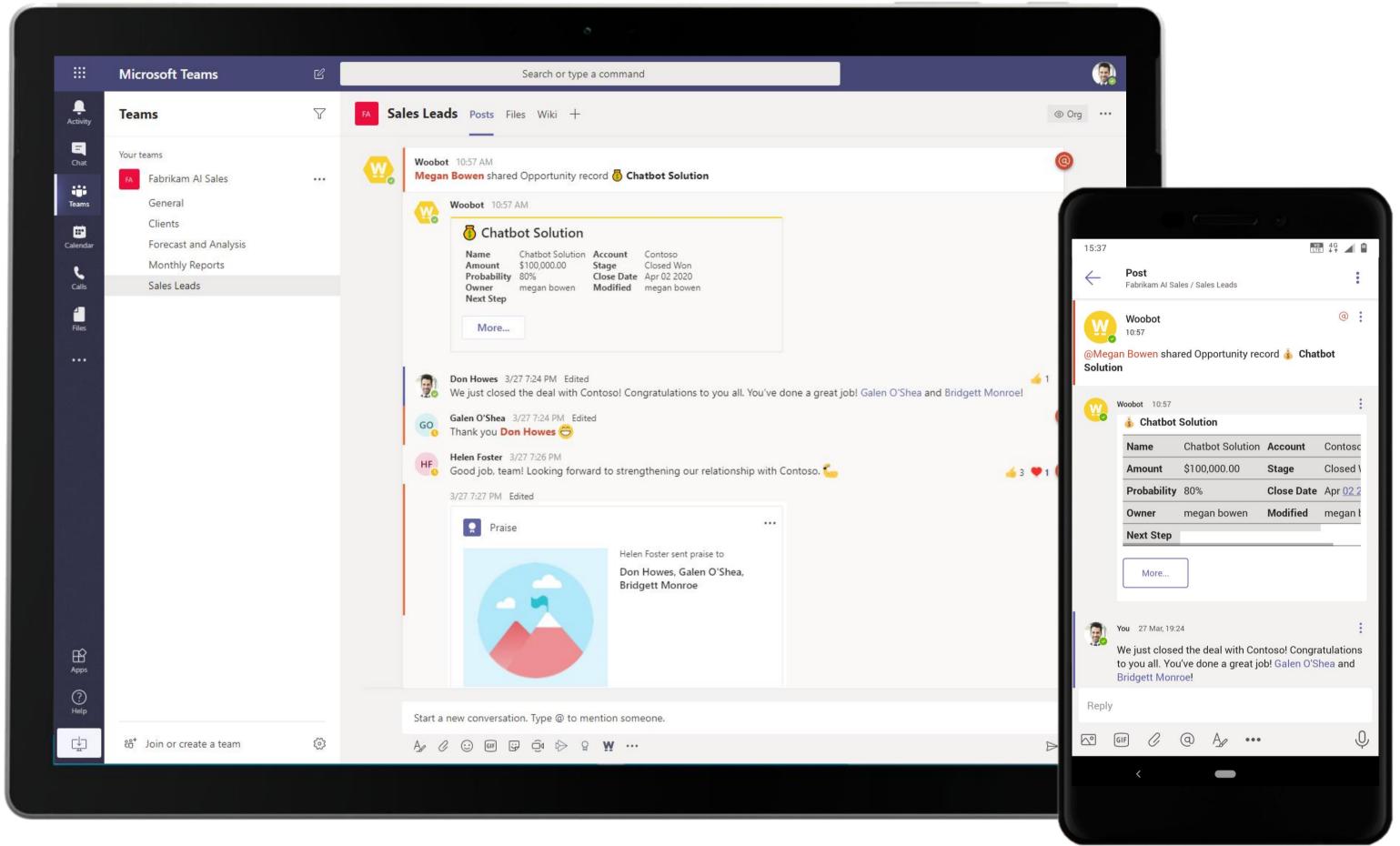


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During a meeting, the participants can use rich meeting capabilities such as video, screen sharing, file sharing, meeting notes and chat to make the meeting engaging and productive. Needless to say, meetings are fully supported on mobile clients too!







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

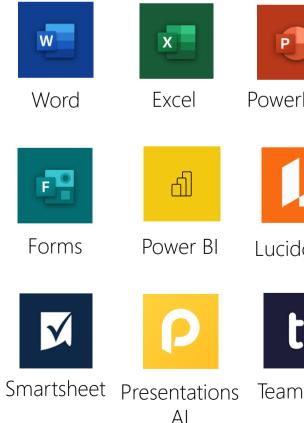
Check out how different marketing personas in your organization ranging from Marketing Manager to Social Media expert can boost daily productivity using Microsoft Teams.

Marketing Superpowers in Teams

Capabilities and Features used...

- Protected, shared spaces for conversation and business ۲ 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





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rPoint	OneNote	Asana	monday.com
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dchart	Trello	Shifts	MURAL
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nwork	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

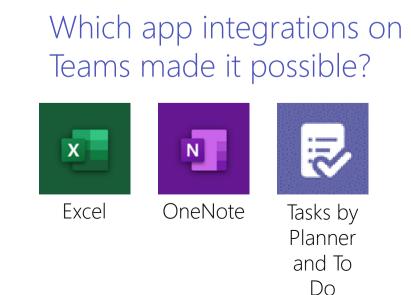
Contoso's award-winning professional services have a constant demand in new markets. To cater to these clients, Contoso is in the process of extending their services and setting up offices in two new, major cities. The marketing team must work together on a plan of action to make their services in these 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.





	Microsoft Teams	Search or type a command		
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Teams	IT Administration 1 Employee Portal Mobile !	Search for members Q • Owners (1)		
4		Name	Title	Location
Files	-	Joni Sherman	Manager	20/1109
	s Sales s Safety and Security 1	 Members and guests (6) Name 	Title	Location
	NO New Operations (LA and Austin)	Debra Berger	Account Manager	18/2107
	General Marketing	Patti Fernandez	Project Lead	15/1102
	Operations	RG Ruby George	Assistant Manager	
		Enrico Cattaneo	Analyst	14/1102
		Christie Cline	Analyst	131/2105
		Johanna Lorenz	Senior Consultant	23/2102
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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.

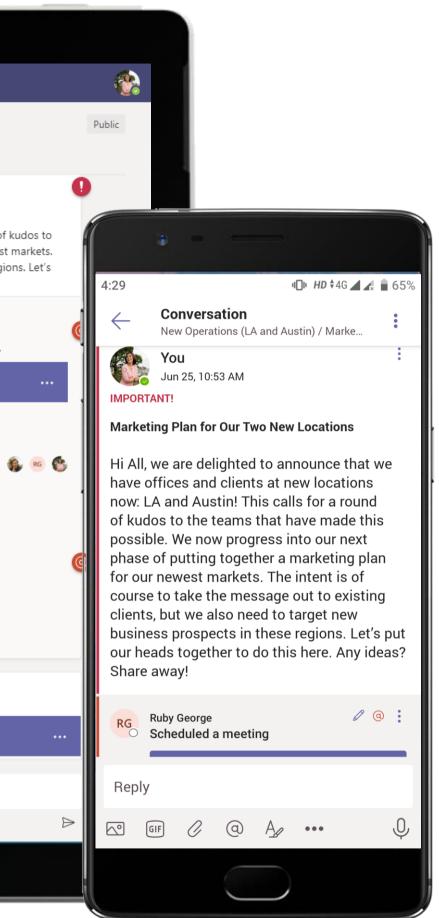


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Member 🗸		Debra Berger Account Manager	:
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		Patti Fernandez Project Lead	:
	RG	Ruby George Assistant Manager	:
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L Activity	Your teams	No New Operations (LA and Austin) > Marketing …
 Chat	Business Development	Conversations Files Wiki Meeting Notes New Marketing Plan New +
ense @ Teams	RR RFP Response - Client X Intra ··· IT Administration ··· ①	Joni Sherman 10:53 AM IMPORTANT! Marketing Plan for Our Two New Locations Hi All, we are delighted to announce that we have offices and clients at new locations now: LA and Austin! This calls for a round of
Heetings	Employee Portal Mobile ··· !	the teams that have made this possible. We now progress into our next phase of putting together a marketing plan for our newest The intent is of course to take the message out to existing clients, but we also need to target new business prospects in these region put our heads together to do this here. Any ideas? Share away!
Files	HR Human Resource (4)	▼ Collapse all
	s Sales ····	Ruby George 10:54 AM Edited Hi Joni Sherman, we can take this discussion over a call. I have pinned a Mural board here for more insight into the plan.
	ss Safety and Security 1	Marketing Plan Discussion Tuesday, June 25, 2019 @ 11:00 AM
	NO New Operations (LA and Austin) •••	Joni Sherman 10:55 AM Sounds good, talk to you soon!
	General Marketing	Q 4 Marketing Plan Discussion ended: 1m 14s
	Operations	Hi Team, here's an initial cut of the marketing plan I've put together. Please share your inputs to fine tune it. Marketing Plan.xlsx ••••
		Enrico Cattaneo 10:59 AM Joni Sherman, I've updated the section on target audience. Please take a look!
		Joni Sherman 10:59 AM Thanks for the insights Enrico Cattaneo looks great!
		← Reply
!		Joni Sherman 11:01 AM Edited Marketing Plan Walk Through for Finance
Get app		Marketing Plan Walk through Tuesday, June 25, 2019 @ 11:30 AM
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Microsoft Teams enables transparent communications through channel conversations. The Marketing Manager communicates in open-channel conversations and keeps team members up-to-date.

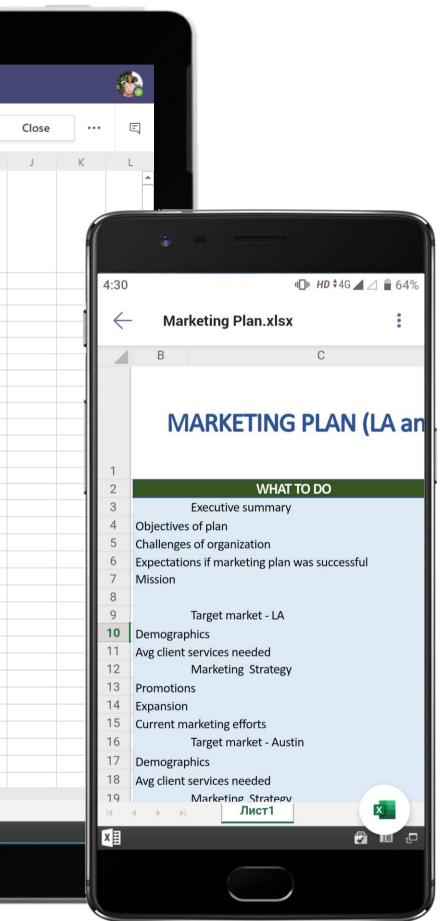




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	5	Challenges of organization					New geography		+
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	9	Target market -	LA						+
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Microsoft Teams makes it easy to share files within channels. 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.

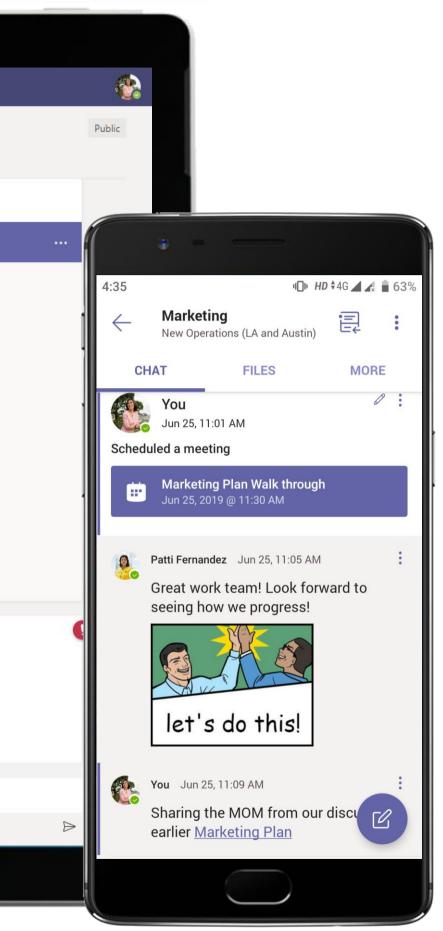


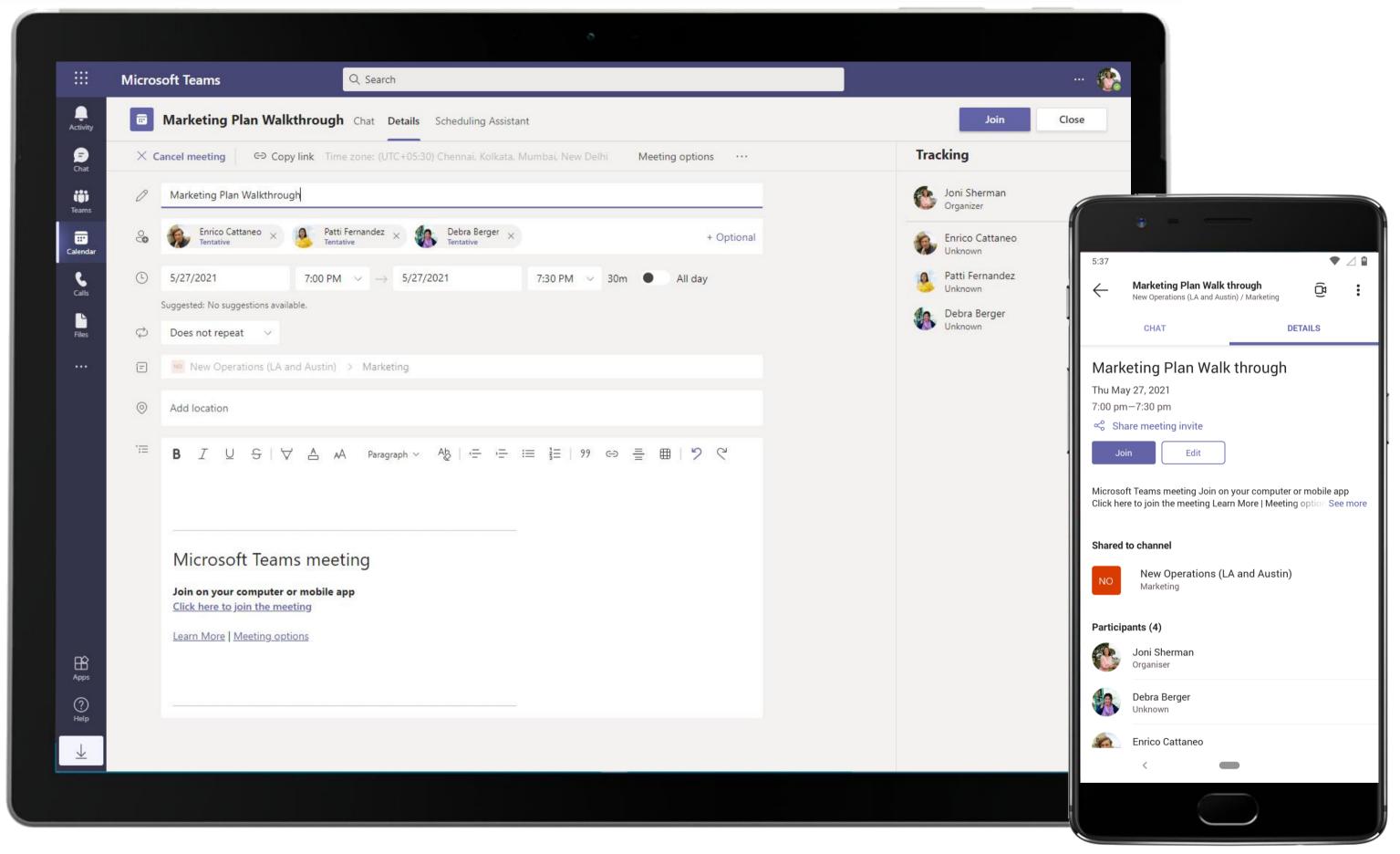


	Microsoft Teams	Search or type a command
Activity	Your teams Business Development	No New Operations (LA and Austin) > Marketing … Conversations Files Wiki Meeting Notes New Marketing Plan New + Joni Sherman 11:01 AM Edited
Teams	RFP Response - Client X Intra ···	Marketing Plan Walk Through for Finance Marketing Plan Walk through Tuesday, June 25, 2019 @ 11:30 AM
Meetings Files	Employee Portal Mobile ··· !	Collapse all Patti Fernandez 11:05 AM Great work team! Look forward to seeing how we progress!
	Sales SS Safety and Security NO New Operations (LA and Austin) General Marketing Operations	Iet's do this! Image: Starting the MOM from our discussion earlier Marketing Plan
Get app G€t Ω		✓ Reply Joni Sherman 11:19 AM IMPORTANTI As discussed in the meeting, here are the process owners to help set the marketing plan in motion: Email marketing: Christie Cline Social media management: Johanna Lorenz Visual collateral - Johanna Lorenz Website and blogs: Ruby George Client accounts: Debra Berger
Store ? Help	టి ⁺ Join or create a team ర్రై	Start a new conversation. Type @ to mention someone.

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!







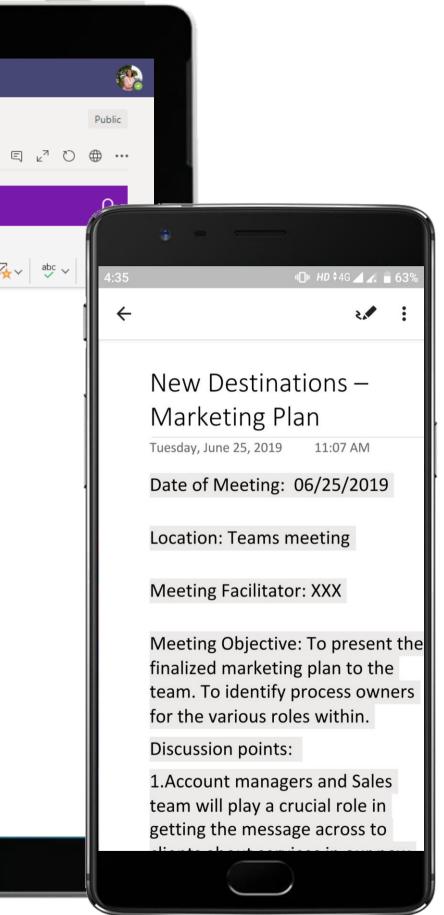
Meetings in Teams include audio, video and file sharing. And because they're online, you'll always have a meeting space and never need to find a room or projector to share ideas.

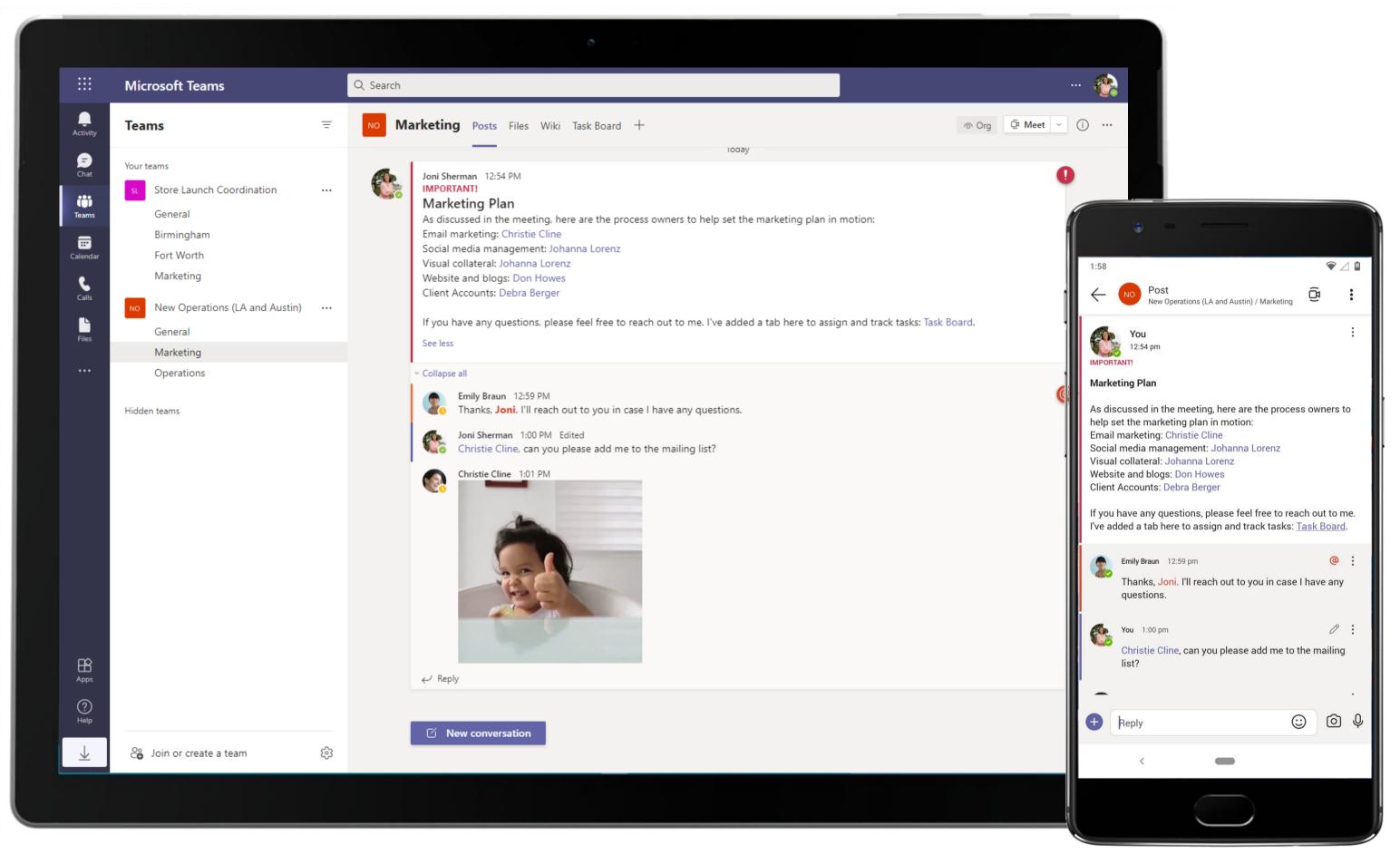


	Microsoft Teams 🛛	Search or type a command
L Activity	Your teams	New Operations (LA and Austin) > Marketing …
E	Business Development	Conversations Files Wiki Meeting Notes New Marketing Plan - +
	RR RFP Response - Client X Intra ····	N OneNote Online - Saved
Teams	IT Administration 1	File Home Insert Draw View Help Open in OneNote
Meetings	EP Employee Portal Mobile ••• !	$ \bigcirc \checkmark \square \checkmark \square \lor \square \square$
Files	HR Human Resource 4	New Destinations – Marketing Plan
	s Sales	Tuesday, June 25, 2019 11:07 AM
	ss Safety and Security 1	Date of Meeting: 06/25/2019
	NO New Operations (LA and Austin) ••••	Location: Teams meeting
	General Marketing	Meeting Facilitator: XXX
	Operations	Meeting Objective: To present the finalized marketing plan to the team. To
		identify process owners for the various roles within. Discussion points:
		1.Account managers and Sales team will play a crucial role in getting the message across to clients about services in our new markets, and they will need all the information about our services in these regions at the earliest.
		 Audience analysis is in progress and marketing plans may have to be customized to suit the audience.
		3.Identified process owners for the plan: Email marketing: @Christie Cline , social media management: @Johanna Lorenz , art and visual collateral - @Johanna Lorenz , website and blogs: @Ruby George, client accounts: @Debra Berger.
Get app		Lorenz , Website and biogst entably George, elent accounts. @ Debra berger.
Store		
? _{Help}	టి⁺ Join or create a team టి	

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.







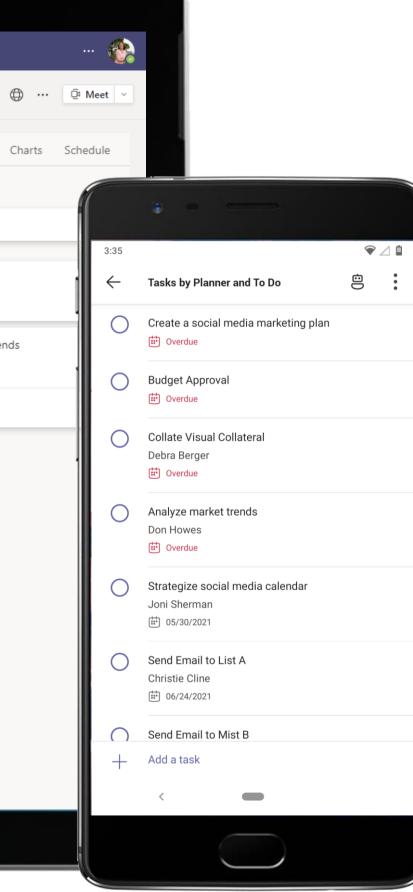
The Marketing Manager delegates tasks to team members through channel communication. The @mention feature ensures that team members don't miss out on messages that need their attention!



	Microsoft Teams	Q Search	
Activity	Teams =	NO Marketing Posts Files Wiki Task Board	(2) ∠ C
E Chat I I I Calendar Calls Files	Your teams Store Launch Coordination ···· General Birmingham Fort Worth Marketing New Operations (LA and Austin) ···· General Operations Hidden teams ····	 Image: Book 200 Im	
Apps			
? _{Help}			
\downarrow	😋 Join or create a team රිදි		

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

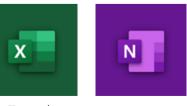
Contoso offers marketing services as part of their bouquet of professional services for clients. As the marketing partners for the MLB World Series, Contoso executes their marketing plans, relying on Microsoft Teams to communicate as well as serve as a protected environment to stash learnings from the 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. ٠
- Find coverage of local, national, and worldwide current affairs with News and share it in a channel.





Excel



Which app integrations on Teams made it possible?

OneNote



News

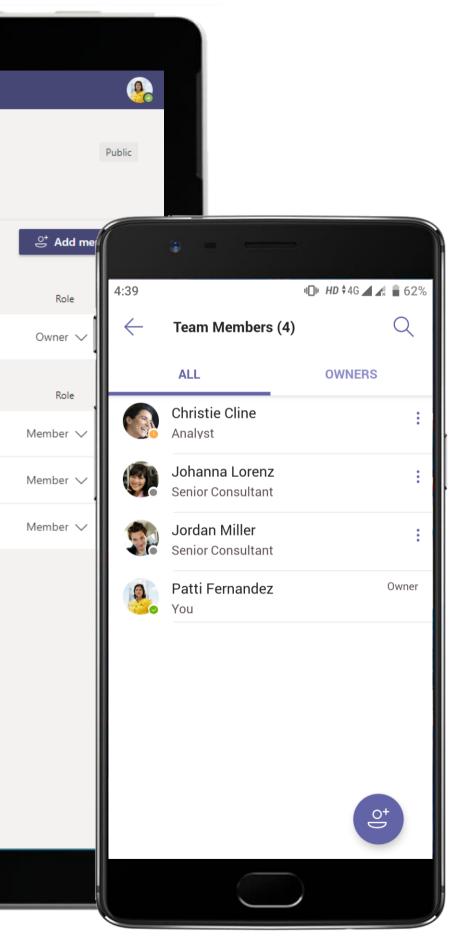


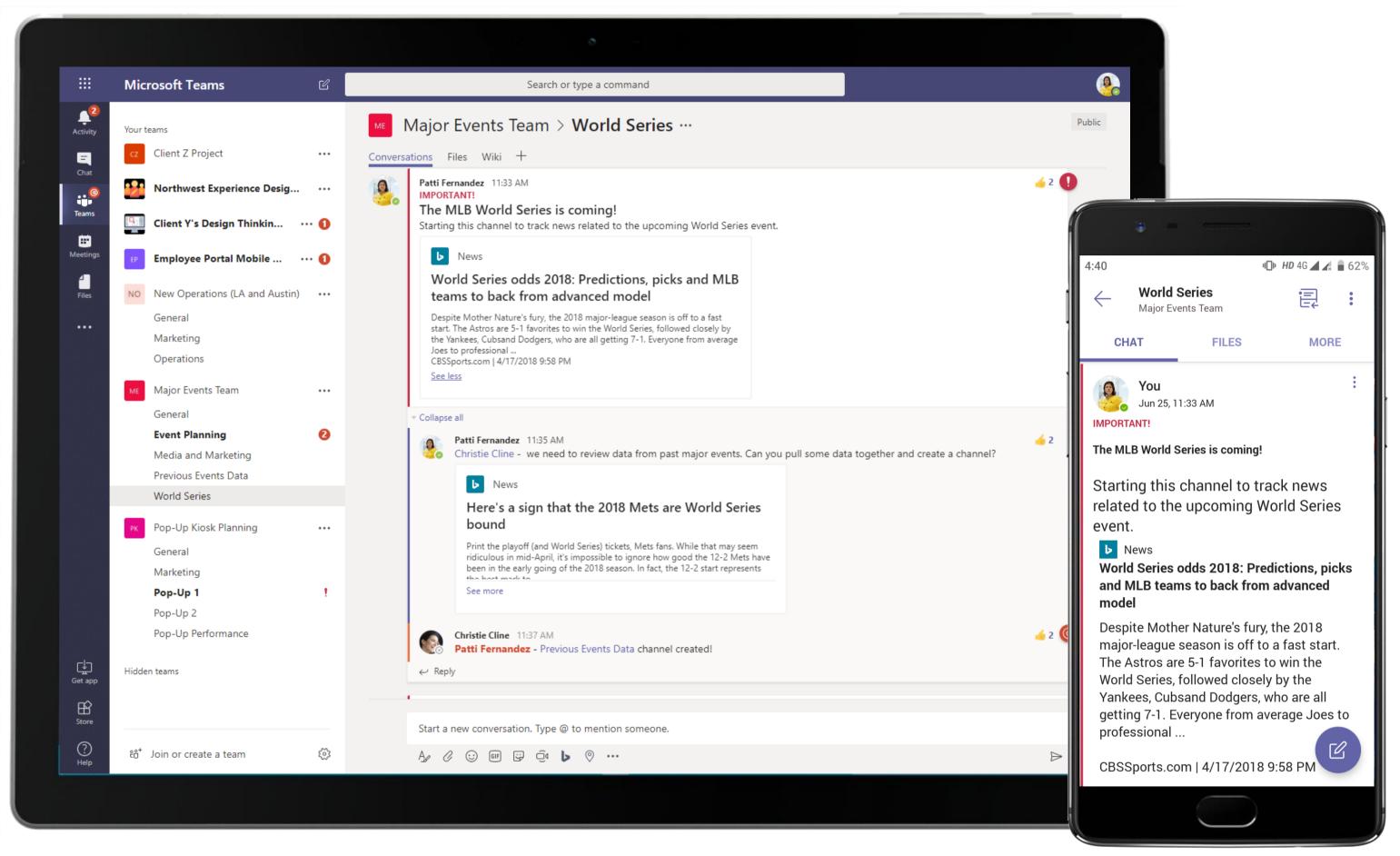
Tasks by Planner and To Do

	Microsoft Teams	Ľ	Search or type a command			
Activity	Your teams CZ Client Z Project CI Northwest Experience Desig		ME Major Events Team …			
Teams	<u> </u>	0	Members Channels Settings Apps Search for members Q • Owners(1)			
files	NO New Operations (LA and Austin) General Marketing Operations		Name Patti Fernandez Members and guests (3) Name	Title Project Lead Title	Location 15/1102 Location	
	Me Major Events Team General Event Planning		Vame Johanna Lorenz	Senior Consultant Analyst	23/2102 131/2105	
	Media and Marketing Previous Events Data World Series		Jordan Miller	Senior Consultant	19/3123	
	PKPop-Up Kiosk PlanningGeneralMarketingPop-Up 1Pop-Up 2Pop-Up Performance					
Get app Store	Hidden teams	~				
Help	ະໍ _{ື່} o ⁺ Join or create a team	3				

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.

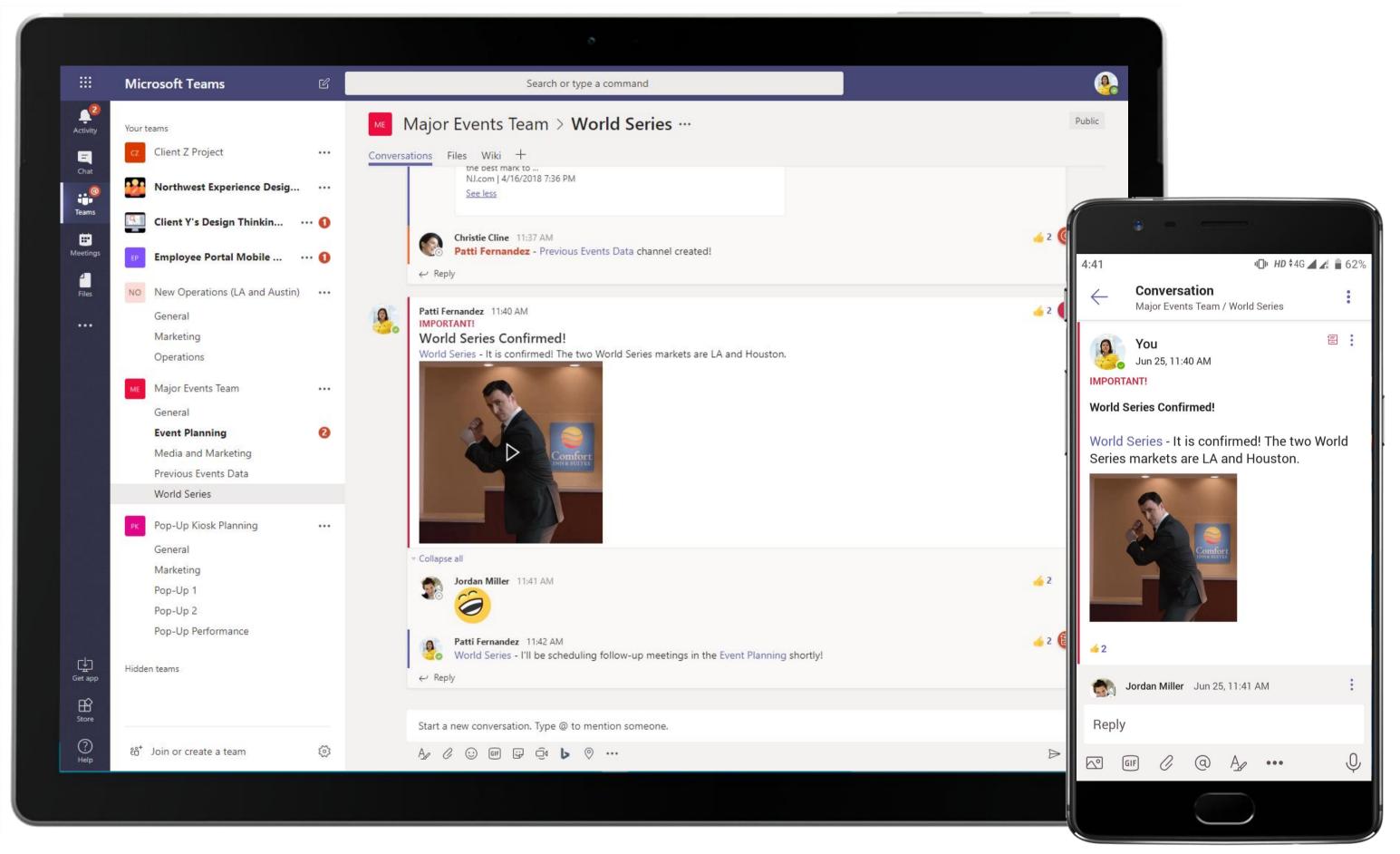






Share snippets of relevant news within the channel using the News app in the compose box of Teams, which allows the Marketing Lead to keep the team in the loop as well as engage them with important or interesting stories.





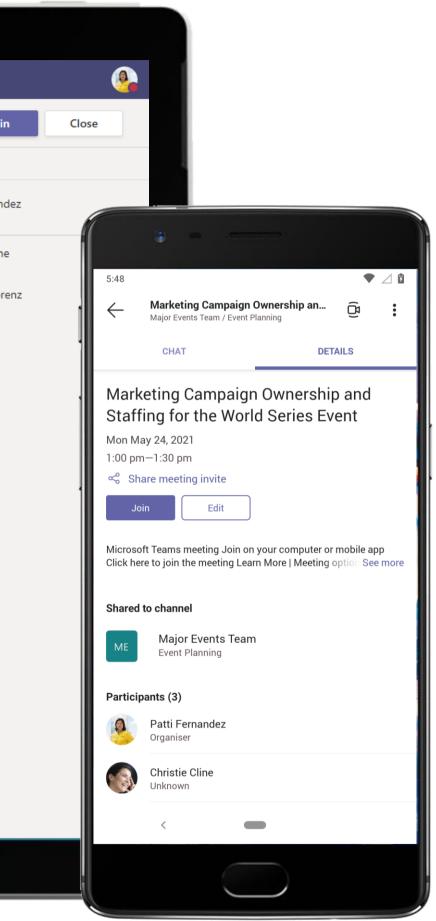
Got updates for you team? It just takes one post to get the message across to everyone in the channel! What's more – GIFs and stickers available right when you compose messages allow making business critical tasks fun as well!



		0	
	Micros	Soft Teams Q Search	
 Activity		Marketing Campaign Ownership and Staffing for the World S Chat Details Scheduling Assistant	oL
(=) Chat	imes c	ancel meeting 🕞 Copy link Time zone: (UTC+05:30) Chennai, Kolkata, Mumbai, New Delhi Meeting options …	Tracking
T eams	0	Marketing Campaign Ownership and Staffing for the World Series Event	Patti Fernar Organizer
:: Calendar	Ç o	Christie Cline × 🕡 Johanna Lorenz × + Optional	Christie Clir Unknown
C alls	Ŀ	5/24/2021 1:00 PM \checkmark \rightarrow 5/24/2021 1:30 PM \checkmark 30m \bullet All day	Johanna Lo Unknown
		Suggested: 8:30 PM-9:00 PM 9:00 PM-9:30 PM 10:00 PM-10:30 PM	
Files	¢	Does not repeat V	
	=	Major Events Team > Event Planning	
	0	Add location	
		B $I \cup S \forall A$ A Paragraph $\lor A_{S} = = = \frac{1}{2} = 99 = = = 9? $	
		Microsoft Teams meeting	
		Join on your computer or mobile app	
		<u>Click here to join the meeting</u>	
		Learn More Meeting options	
? Help			

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.

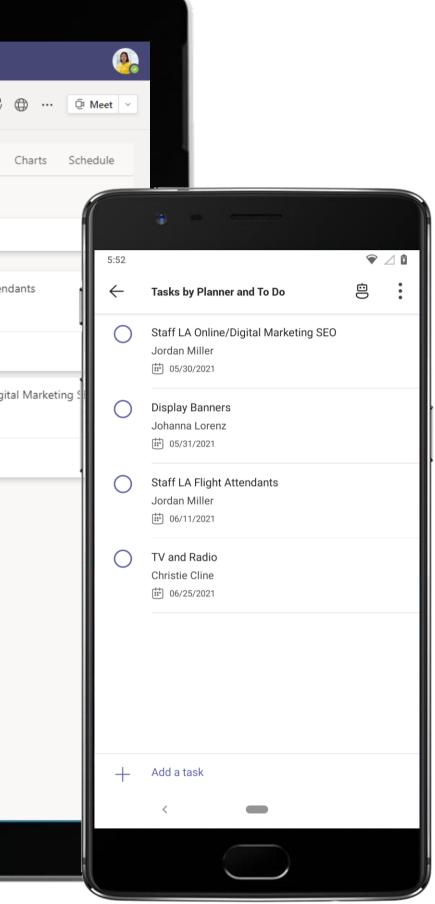




	Microsoft Teams		Q Search		
Activity	Teams	Ŧ	ME Event Planning Posts File	les Wiki Staffing Tasks ~ +	 @ ∠ C
(F) Chat	s. Store Launch Coordination			Group by Bucket	~ Filter ~ List Board
())	General				
	Birmingham		To do	Houston	LA
	Marketing		+ Add task	+ Add task	+ Add task
	1 hidden channel				
	cz Client Z Project			O Display Banners	Staff LA Flight Atte
	General			Ⅲ 05/31	₩ 06/11
	Delivery				-
	Onboarding			Johanna Lorenz	Jordan Miller
	Steering Committee				
				O TV and Radio	Staff LA Online/Dig
	Client Y's Design Thinking Wor			i 06/25 €	節 05/30
	General			Christie Cline	Jordan Miller
	Collaborative Workshop				
	Workshop Task Management				
	ME Major Events Team				
	General				
	Event Planning				
	Media and Marketing				
	Past Events Data				
	World Series				
	Employee Portal Mobile App				
	General				
	App Review and Delivery				
	App Review and Delivery Daily Stand-up				

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.

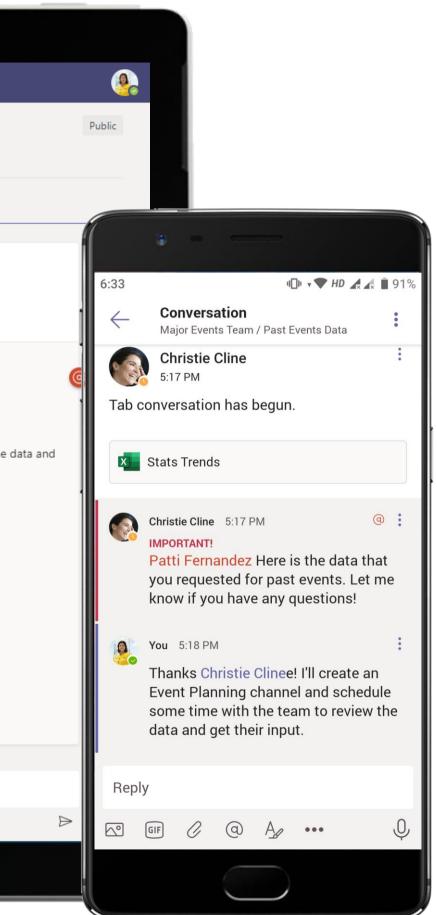




	Microsoft Teams	C	Search or type a command
L. Activity	Workshop Task Management		Major Events Team > Past Events Data …
E Chat	EP Employee Portal Mobile App	•••	Conversations Files Wiki Stats Trends New +
eams	App Review and Delivery Daily Stand-Up		Patti Fernandez set this channel to be automatically shown in the channels list. Last read
	Engineering and Development Pull Requests		Christie Cline 5:17 PM Tab conversation has begun.
Files	UX Design		Stats Trends
	New Operations (LA and Austin)	•••	Collapse all Christie Cline 5:17 PM
	Marketing Operations	1	IMPORTANT! Patti Fernandez Here is the data that you requested for past events. Let me know if you have any questions!
	ME Major Events Team		Patti Fernandez 5:18 PM Thanks Christie Clinee! I'll create an Event Planning channel and schedule some time with the team to review the get their input.
	General Event Planning		Christie Cline 5:18 PM
	Media and Marketing Past Events Data		
	World Series		
	PK Pop-Up Kiosk Planning General Marketing	•••	
Get app	Pop-Up 1 Pop-Up 2 Pop-Up Performance		← Reply
	Hidden teams	4	
? Help	ະວີ ⁺ Join or create a team	<u>نې</u>	Start a new conversation. Type @ to mention someone. $A_{\mathscr{A}} \mathscr{O} \qquad $

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.

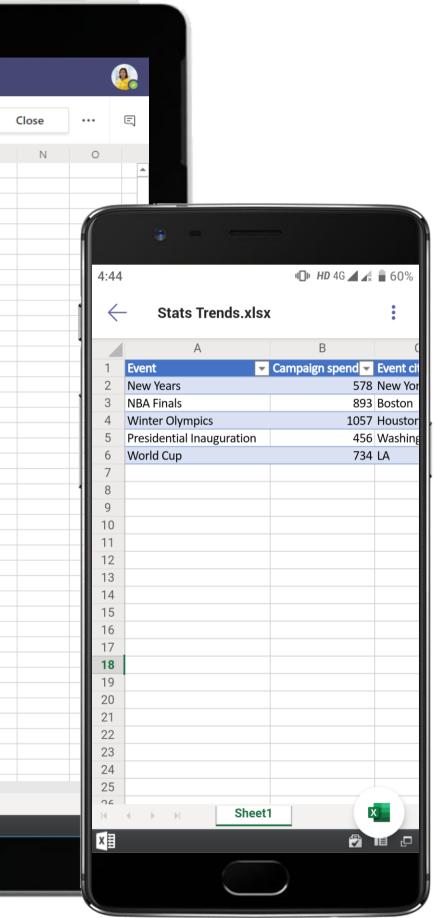


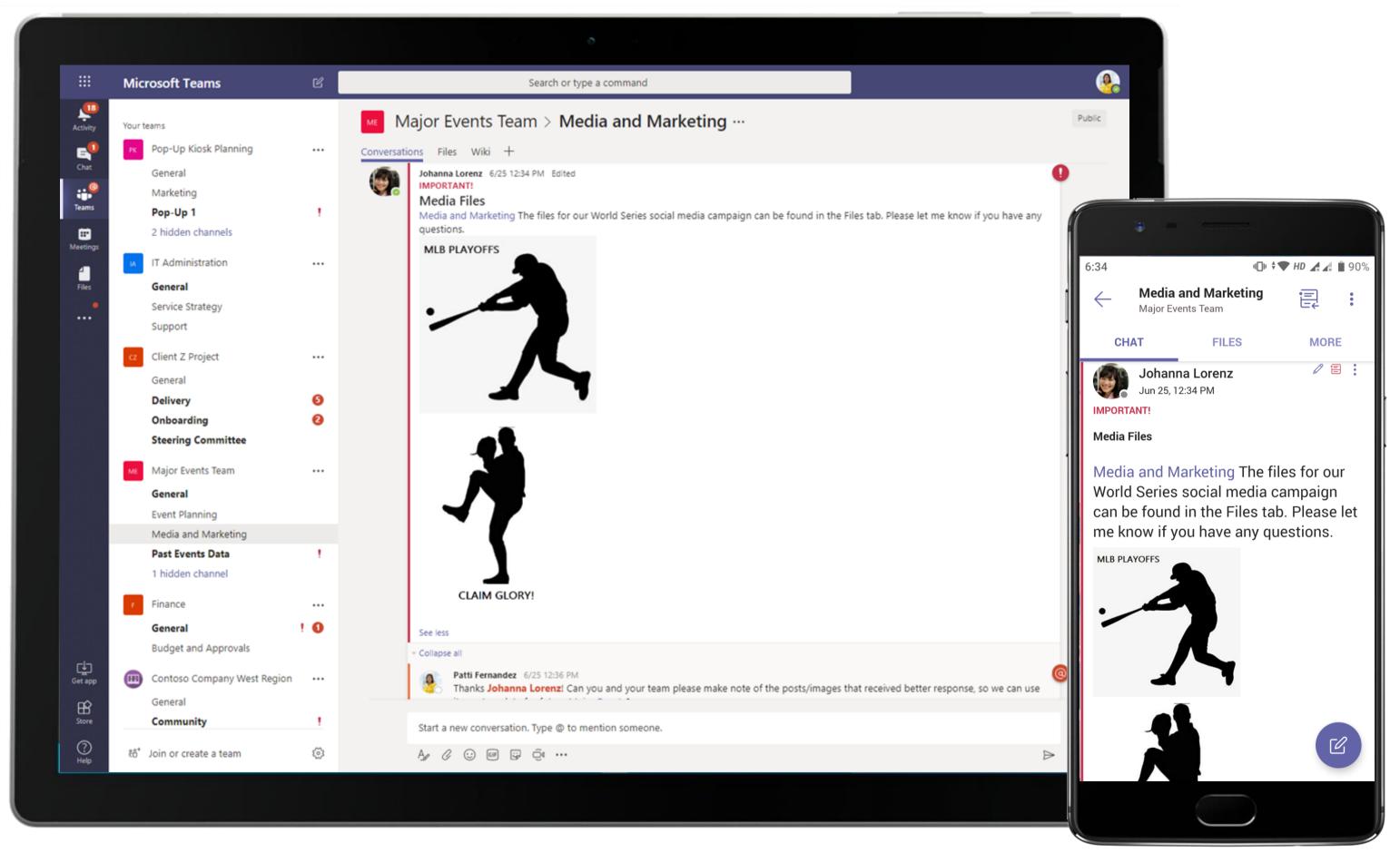


Activity		Stats Trends.xlsx											Edit
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Chat			aign spend 🔻	Event city 🚽	Number of digital campaigi 🔻	Added Staffing 🔄							
	2	New Years	578	8 New York	12								
•••		NBA Finals		Boston	33								
Teams		Winter Olympics		' Houston	19								
		Presidential Inauguration		Washington DC	26								
		World Cup	734	LA	54	810							
leetings	7												
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		< → → Sheet1											

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.

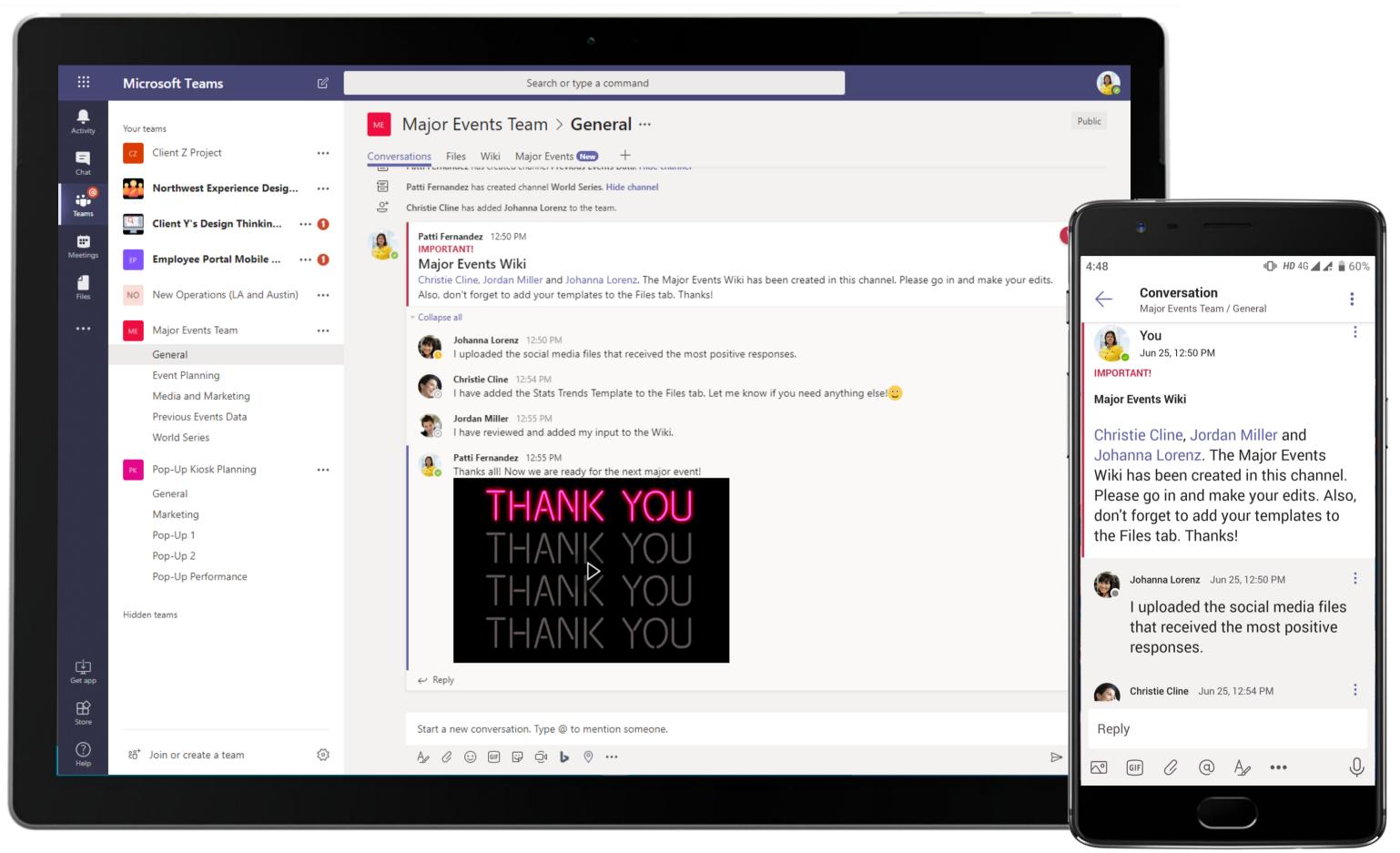






A lot of the Marketing team's efforts to push their services to customers include visual aids such as pictures and videos. The Files repository is a protected place to house the media files the Marketing Lead collates from her team.





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.



 Northwest Experience Desig Client Y's Design Thinkin The ploysee Portal Mobile The ploysee Portal Mobile The ploysee Portal Mobile The ploy Deprations (LA and Austin) New Operations (LA and Austin) New Operations (LA and Austin) New Operations (LA and Austin) Major Events Team Pop-Up Klosk Planning General Marketing Pop-Up 1 Pop-Up 2 Pop-Up Performance Hiden teams Hiden teams Hiden teams Line Austing Comparison (LA and Austin) Hiden teams Line Austing Pop-Up Nosk Planning Hiden teams Line Austing Pop-Up Performance Hiden teams Line Austing Pop-Up Performance Hiden teams Line Austing Pop-Up Performance Hiden teams Line Austing Line Austing Line Austing Line Austing Pop-Up Performance Hiden teams Line Austing Lin				
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 Northwest Experience Design		Your teams	Major Events Team > General ···	
 Northwest Experience Desig Client Y's Design Thinkin		cz Client Z Project •••	Conversations Files Wiki Major Events - +	⊑ ⊾ ⁷ Ö
 Client Y's Design Thinkin		Northwest Experience Desig	N OneNote Online - Saved	
Image: Second Secon		Client Y's Design Thinkin ••• 1	File Home Insert Draw View Help Open in OneNote	
 No New Operations (LA and Austin) *** Major Events Team *** Major Events Team *** Pop-Up Kiosk Planning *** General Marketing Pop-Up 1 Pop-Up 2 Pop-Up Performance Hidden teams Hidden teams Major Events Kit Tuesday, June 25, 2019 12:57 PM Summary The purpose of this team is to plan and prepare for marketing plans and campaigns for a major event. Microsoft Teams can provide structure and help you structure and help you structure and help you structure. Would be the provide structure Weiden teams Hidden teams Would be the provide structure Weiden teams Would be the provide structure and help you structure and help you structure and help you structure and help you structure and nouncements. Past Event Name" channel - Use this channel to help communicate all-up news and announcements. Past Event Data channel - Use this channel to share and analyze data from past major events. Event Planning channel - Use this channel to share files and memos with the social media team. Planning Steps Identify cities/markets Identify cities/markets	Meetings	EP Employee Portal Mobile ••• 1	$ \bigcirc \checkmark \ \textcircled{Calibri Light} \ \lor 20 \ \lor \ \blacksquare \ I \ \bigsqcup \ \swarrow \ \checkmark \ \checkmark \ \checkmark \ \checkmark \ \land \ \checkmark \ \land \ \checkmark \ \land \ \land$	Karley v state abc ∨
Pop-Up Kiosk Planning ••• General Marketing Pop-Up 1 The purpose of this team is to plan and prepare for marketing plans and campaigns for a major event. Microsoft Teams can provide structure and help you stay organized. Pop-Up 2 Pop-Up Performance Hidden teams "Event Name" channel - Use this channel to help communicate all-up news and announcements Past Event Data channel - Use this channel to share and analyze data from past major events Event Planning channel - Use this channel to connect with Flight Planners and Schedulers to share flight models and staffing Media and Marketing channel - Use this channel to share files and memos with the social media team Planning Steps Identify cities/markets		NO New Operations (LA and Austin) ····	> Major Events Kit	
General The purpose of this team is to plan and prepare for marketing plans and campaigns for a major event. Microsoft Teams can provide structure and help you stay organized. Pop-Up 1 Channel Structure Pop-Up 2 Pop-Up Performance Hidden teams Past Event Name" channel - Use this channel to help communicate all-up news and announcements Hidden teams Past Event Data channel - Use this channel to share and analyze data from past major events Event Planning channel - Use this channel to connect with Flight Planners and Schedulers to share flight models and staffing Media and Marketing channel - Use this channel to share files and memos with the social media team Planning Steps Identify cities/markets		ME Major Events Team ••••	Tuesday, June 25, 2019 12:57 PM	
Identify cities/markets		General Marketing Pop-Up 1 Pop-Up 2 Pop-Up Performance	The purpose of this team is to plan and prepare for marketing plans and campaigns for a major event. Microsoft Teams can provide structure and help you stay organized. Channel Structure "Event Name" channel - Use this channel to help communicate all-up news and announcements Past Event Data channel - Use this channel to share and analyze data from past major events Event Planning channel - Use this channel to connect with Flight Planners and Schedulers to share flight models and staffing Media and Marketing channel - Use this channel to share files and memos with the social media team	
Get app Get app Store Identify the correct parties that need to be added to your team Review data from past major events Development of staffing tasks and vet with scheduling Develop social media strategy	Store		Identify cities/markets Get organized in Teams with the appropriate channel structure Identify the correct parties that need to be added to your team Review data from past major events Development of staffing tasks and vet with scheduling	
		ిరి ⁺ Join or create a team ర్రె		

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!



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2.

Major Events Kit

Tuesday, June 25, 2019 12:57 PM

Summary

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Public

←

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The purpose of this team is to plan and prepare for marketing plans and campaigns for a major event. Microsoft Teams can provide structure and help you stay organized.

Channel Structure

"Event Name" channel - Use this channel to help communicate allup news and announcements

Past Event Data channel - Use this channel to share and analyze data from past major events

Event Planning channel - Use this



Pop-Up Kiosks Marketing Project Lead

Scenario Walkthrough

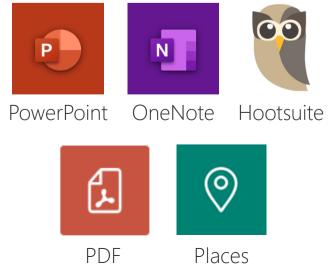
Contoso's client, a popular chain of home furnishing stores, is looking for new ways to reach customers and expand their customer base. The Marketing Lead identifies pop-up kiosks at malls across the country as an ideal way to reach their target audience. In these kiosks, Contoso will offer customers 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.

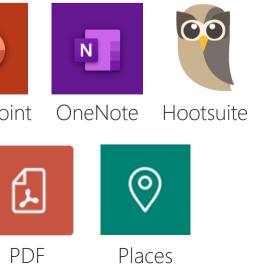
- Finalizes the first location for the kiosk and posts an announcement in the channel.
- Announces kick-off meeting to fine tune plans for the kiosk.
- Reviews social media plan and response to the announcements in various social media channels. •
- Reviews social media response using Hootsuite integrated 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. •

made it possible?





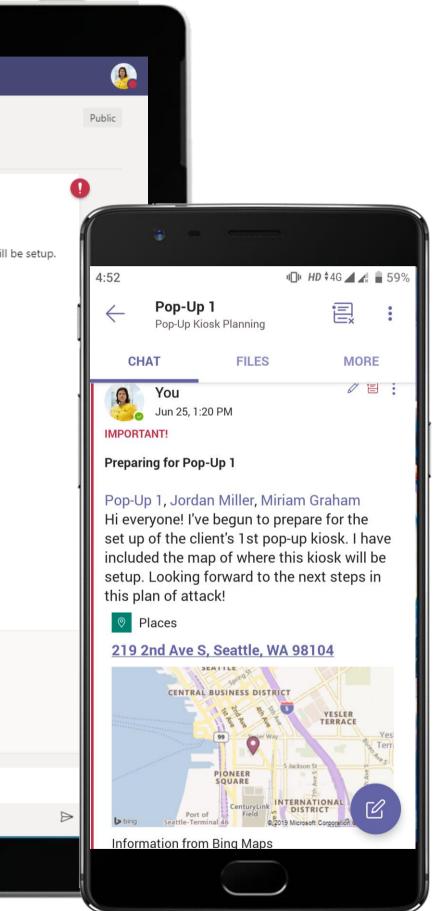


Which app integrations on Teams

	Microsoft Teams	Search or type a command
L Activity	Your teams	Prop-Up Kiosk Planning > Pop-Up 1 ···
E Chat	CZ Client Z Project	Conversations Files Wiki Meeting Notes New Social Media Monitoring New +
	Northwest Experience Desig •	Patti Fernandez 1:20 PM Edited IMPORTANT!
Teams	Client Y's Design Thinkin	Preparing for Pop-Up 1 Pop-Up 1, Jordan Miller, Miriam Graham
Meeting	Employee Portal Mobile ••• (Hi everyone! I've begun to prepare for the set up of the client's 1st pop-up kiosk. I have included the map of where this kiosk will Looking forward to the next steps in this plan of attack!
4 Files	NO New Operations (LA and Austin) •	•• Places
	Me Major Events Team	219 2nd Ave S, Seattle, WA 98104
	General	CENTRAL BUSINESS DISTRICT
	Event Planning	YESLER YESLER
	Media and Marketing	TERRACE
	Previous Events Data	Terr
	World Series	
		CenturyLink INTERNATIONAL SAIGON
	General	bing Seattle-Terminal 46 S2019 Microsoft Corporation S 2018 HERE
	Marketing	Information from Bing Maps
	Pop-Up 1	Directions
	Pop-Up 2	
	Pop-Up Performance	
	Hidden teams	Collapse all Jordan Miller 1:22 PM Great, looking forward to getting this set up!
		Johanna Lorenz 1:22 PM
Get app		View I love that area, nice!
₿ Store		All and a state of the state of
Store		Start a new conversation. Type @ to mention someone.
? Help	ະວ້ Join or create a team ຊ	

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.

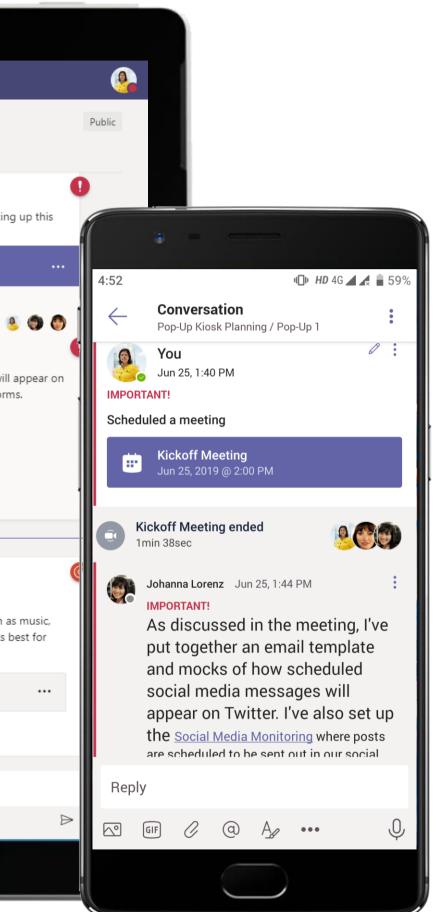


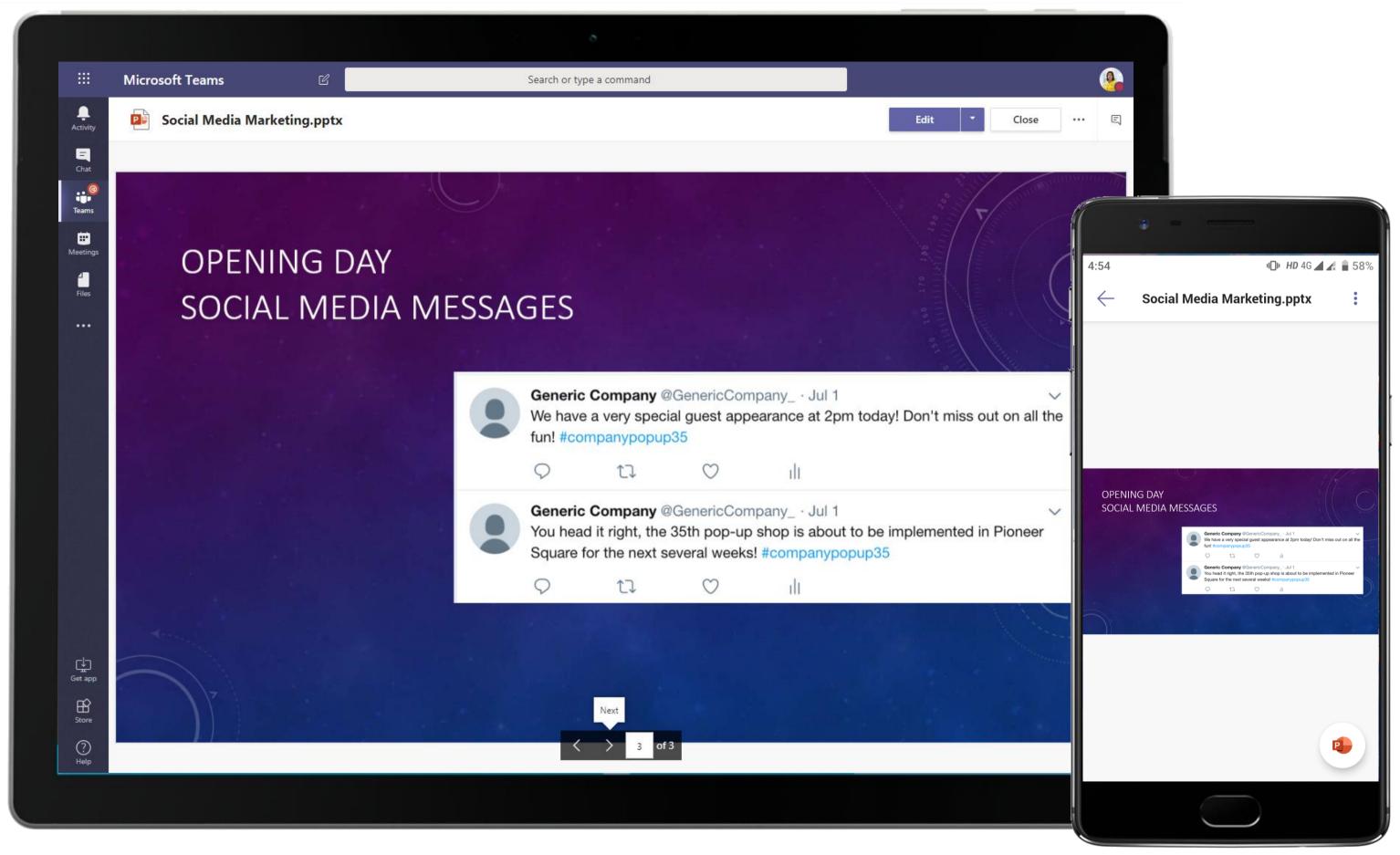


	Microsoft Teams	Ľ	Search or type a command	
L Activity	Your teams		Pop-Up Kiosk Planning > Pop-Up 1 ···	
Ę	cz Client Z Project	•••	Conversations Files Wiki Meeting Notes New Social Media Monitoring New +	
Chat	Northwest Experience Desig		Patti Fernandez 1:40 PM Edited IMPORTANT! Scheduling this call to discuss the kick off and set up of Contoso's 1st Pop-Up kiosk. We will discuss logistics of successfully set	etti
Teams	Client Y's Design Thinkin	🛈		
E Meetings	Employee Portal Mobile	1		
Files	NO New Operations (LA and Austi	n) ••••	 Collapse all ☐ Kickoff Meeting ended: 1m 38s 	
	ME Major Events Team		Johanna Lorenz 1:44 PM IMPORTANT!	
	General		As discussed in the meeting, I've put together an email template and mocks of how scheduled social media messages	
	Event Planning		Twitter. I've also set up the Social Media Monitoring where posts are scheduled to be sent out in our social media plat	tor
	Media and Marketing		Social Media Marketing.pptx ····	
	Previous Events Data			
	World Series		Patti Fernandez 1:50 PM Thanks for getting this done Johanna Lorenz! I will review the social media response at the end of the week.	
	РК Pop-Up Kiosk Planning		\leftarrow Reply	
	General		Last read	
	Marketing			
	Pop-Up 1		Johanna Lorenz 2:04 PM IMPORTANT!	
	Pop-Up 2		Discuss: Third-Party Vendor Selection	
	Pop-Up Performance		Pop-Up 1, I just received the quotes from third-party vendors who are interested in collaborating with Contoso for services su decorations, giveaways, etc. All quotes are attached for reference here. Patti Fernandez please let me know which vendor wo	
	Hidden teams		you.	1153
	Inden teams		Third-Party Company A Quote.pdf 🗜 Third-Party Company B Quote.pdf	
Get app			Third-Party Company C Quote.pdf ····	
Store				
			Start a new conversation. Type @ to mention someone.	
? Help	ະືຕ⁺ Join or create a team	£33		
	والكرك والمتحاد			

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.







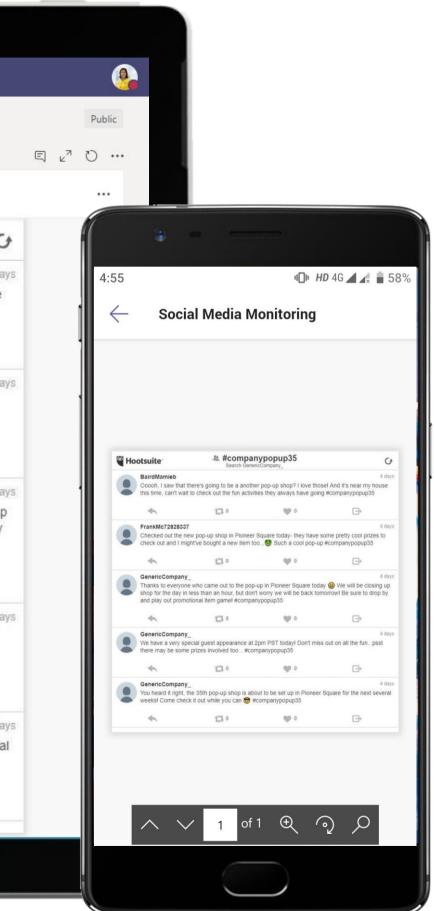
Create and share PowerPoint presentations over a Teams call to make meetings meaningful and to offer attendees a visual representation of key points covered.



	Microsoft Teams		Search or type	a command		
L Activity	Your teams	рк Рор-	-Up Kiosk Planning >	Pop-Up 1 ···		
	cz Client Z Project ····	Conversations	Files Wiki Meeting Notes 🕻	Social Media Monitori	ng 🗸 1 more (New) 🗸 🗧	F
Chat	Northwest Experience Desig	🔒 So	cial Media Monitoring.pd	f		
ms	Client Y's Design Thinkin 😶 🚺		Hootsuite	ໍໍ່ #compa	nypopup35	c
ngs	Employee Portal Mobile 😶 🚺		BairdMamieb	Search Gene	ricCompany_	4 da
	NO New Operations (LA and Austin)		Ococh, I saw that		er pop-up shop? I love those ties they always have going	e! And it's near my house
	Me Major Events Team ····		*	10	• 0	G*
	General		FrankMc7282833	7		4 da
	Event Planning				Square today- they have so	
	Media and Marketing Previous Events Data			gntive bought a new item to	oo 😌 Such a cool pop-up	#companypopup35
	World Series		*	1 0	••• 0	B
	Pop-Up Kiosk Planning		GenericCompany			4 da
Ē	General				-up in Pioneer Square today 't worry we will be back tom	
	Marketing			otional item game! #compa		
	Pop-Up 1					
	Pop-Up 2			110	V 0	5
	Pop-Up Performance		GenericCompany			4 da
	Hidden teams			pecial guest appearance at e prizes involved too #con	2pm PST today! Don't miss mpanypopup35	out on all the funpsst
			*	12 0	••• 0	B
			GenericCompany	/		4 da
φ				the 35th pop-up shop is ab ck it out while you can 😁 #	out to be set up in Pioneer § companypopup35	Square for the next severa
re) Ip	tö⁺ Join or create a team భై		*	tl 0	• 0	G

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

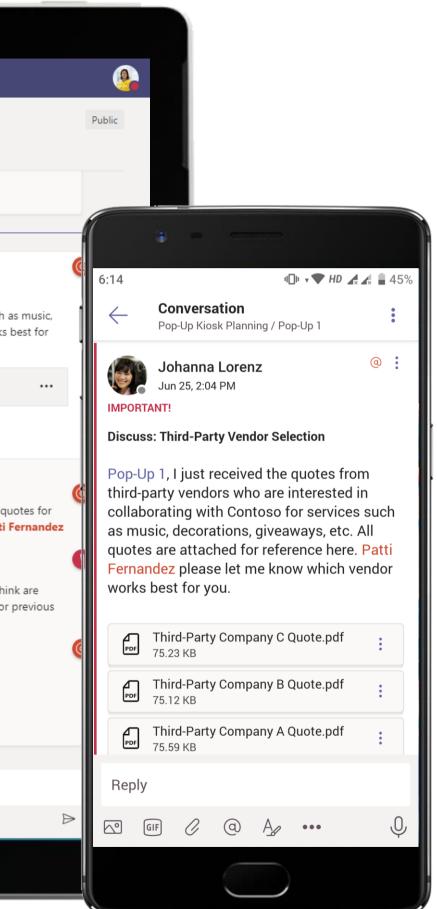




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	Microsoft Teams	Ľ	Search or type a command
y	Your teams		Prop-Up Kiosk Planning > Pop-Up 1 ···
	cz Client Z Project		Conversations Files Wiki Meeting Notes New Social Media Monitoring 3rd Party Vendor List New +
at O	Northwest Experience Desig.		Thanks for getting this done Johanna Lorenz! I will review the social media response at the end of the week. Reply
	Client Y's Design Thinkin	🕦	Last read
	Employee Portal Mobile	0	Johanna Lorenz 2:04 PM IMPORTANT!
5	NO New Operations (LA and Austin	n) •••	Discuss: Third-Party Vendor Selection Pop-Up 1, I just received the quotes from third-party vendors who are interested in collaborating with Contoso for services such decorations, giveaways, etc. All quotes are attached for reference here. Patti Fernandez please let me know which vendor works
	ME Major Events Team		you.
	General Event Planning		Third-Party Company A Quote.pdf 🔓 Third-Party Company B Quote.pdf
	Media and Marketing Previous Events Data		Third-Party Company C Quote.pdf
	World Series		▼ Collapse all
	Рк Pop-Up Kiosk Planning General		Johanna Lorenz 2:17 PM I've also gone ahead and created a tab called, 3rd Party Vendor List, which includes all the companies that've sent their of potential collaboration in the Pop-Up effort. Please go over this and finalize the list we want to use for the pop-up, Patti
	Marketing		Patti Fernandez 2:19 PM
	Pop-Up 1		IMPORTANT!
	Pop-Up 2		Johanna Lorenz thank you for compiling this information. I've gone through the notes and highlighted the ones that I th suitable options based on our discussion. I propose to go with Company B since they have worked with us in the past fo
	Pop-Up Performance		events.
	Hidden teams		Miriam Graham 2:20 PM I agree with you Patti Fernandez
			Johanna Lorenz 2:20 PM Noted, I will go ahead and finalize the details with the vendor.
] P P			← Reply
e			Start a new conversation. Type @ to mention someone.
) Ip	ະໍຕໍ⁺ Join or create a team	53	

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.



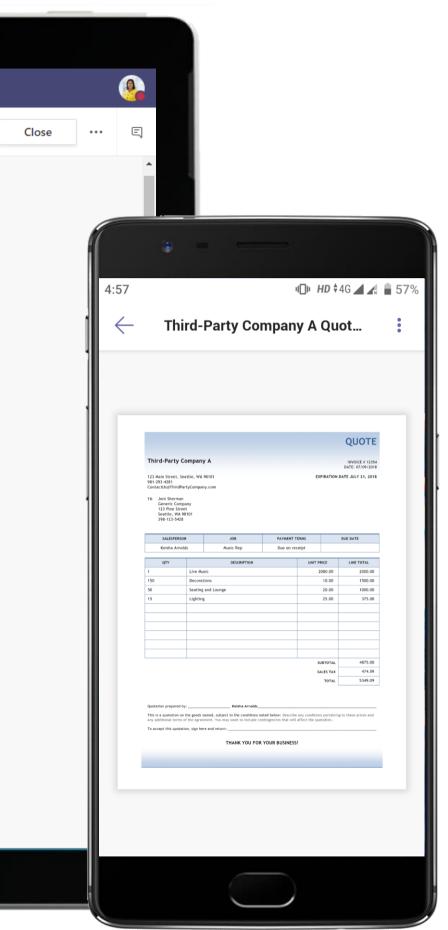


Marketing - Pop-Up Kiosks

 Activity	Microsoft Teams							
L Activity		Ľ			Search or type a co	ommand		
	🔒 Third-Party Com	pany A Quote.pdf	F					
— Chat								
								QUOTE
Teams			Third-Party	Company	y A			INVOICE # 12354 DATE: 07/09/2018
Heetings Files			123 Main Street, S 981-293-4281 ContactUs@ThirdF TO Joni Sherma Generic Com 123 Pine Str Seattle, WA 298-123-542	PartyCompar n npany eet 98101			EXPIRATI	DN DATE JULY 21, 2018
			SALESPERS	ON	JOB	PAYMENT T	ERMS	DUE DATE
			Keisha Arno	olds	Music Rep	Due on rec	ceipt .	
			QTY		DESCRIPTION		UNIT PRICE	LINE TOTAL
			1	Live Mu Decorat			2000.00	
			50	Seating	and Lounge		20.00	1000.00
				Lightin	3		25.00	375.00
							SUBTOTA	L 4875.00
							SALES TA TOTA	
Get app Store Help			This is a quotation o any additional terms	on the goods r s of the agree	named, subject to the conditions a ement. You may want to include o re and return:	noted below: Describe ontingencies that will	any conditions pertai affect the quotation.	

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.

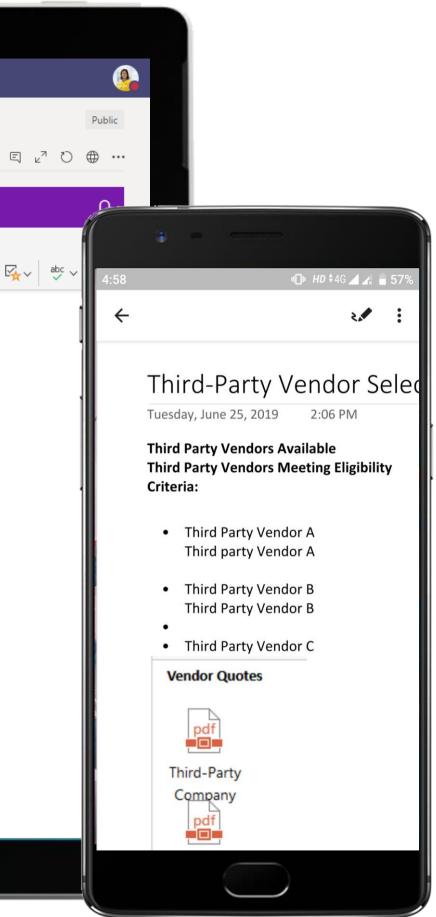




 Activity	Microsoft Teams	Search or type a command
Activity	Your teams	
		Pop-Up Kiosk Planning > Pop-Up 1 ···
	cz Client Z Project ••	Conversations Files Wiki Meeting Notes 🗪 3rd Party Vendor List 🗸 1 more 🗸 🕂
Chat	Northwest Experience Desig ••	N OneNote Online - Saved
Teams	Client Y's Design Thinkin 😶 🚺	File Home Insert Draw View Help Open in OneNote
	EP Employee Portal Mobile ••• 1	$ \bigcirc \checkmark \square \checkmark \square \lor \square$
Files	NO New Operations (LA and Austin) ••	Third-Party Vendor Selection
	Major Events Team ••	Tuesday, June 25, 2019 2:06 PM
	General Event Planning	Third Party Vendors Available Third Party Vendors Meeting Eligibility Criteria:
	Media and Marketing	Third Party Vendor A Third party Vendor A
	Previous Events Data World Series	Third Party Vendor B Third Party Vendor B
	Рк Pop-Up Kiosk Planning •••	Third Party Vendor C Vendor Quotes
	General	
	Marketing	
	Pop-Up 1 Pop-Up 2	Third-Party Company
	Pop-Up Performance	pdf
	Hidden teams	Third-Party Company
Get app		Third-Party Company
Store		
? Help	టి ⁺ Join or create a team క్ర	

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



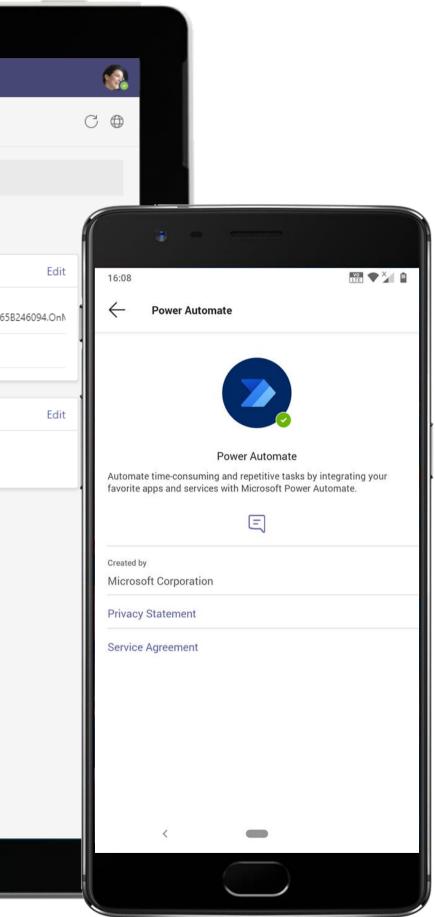
Power Bl

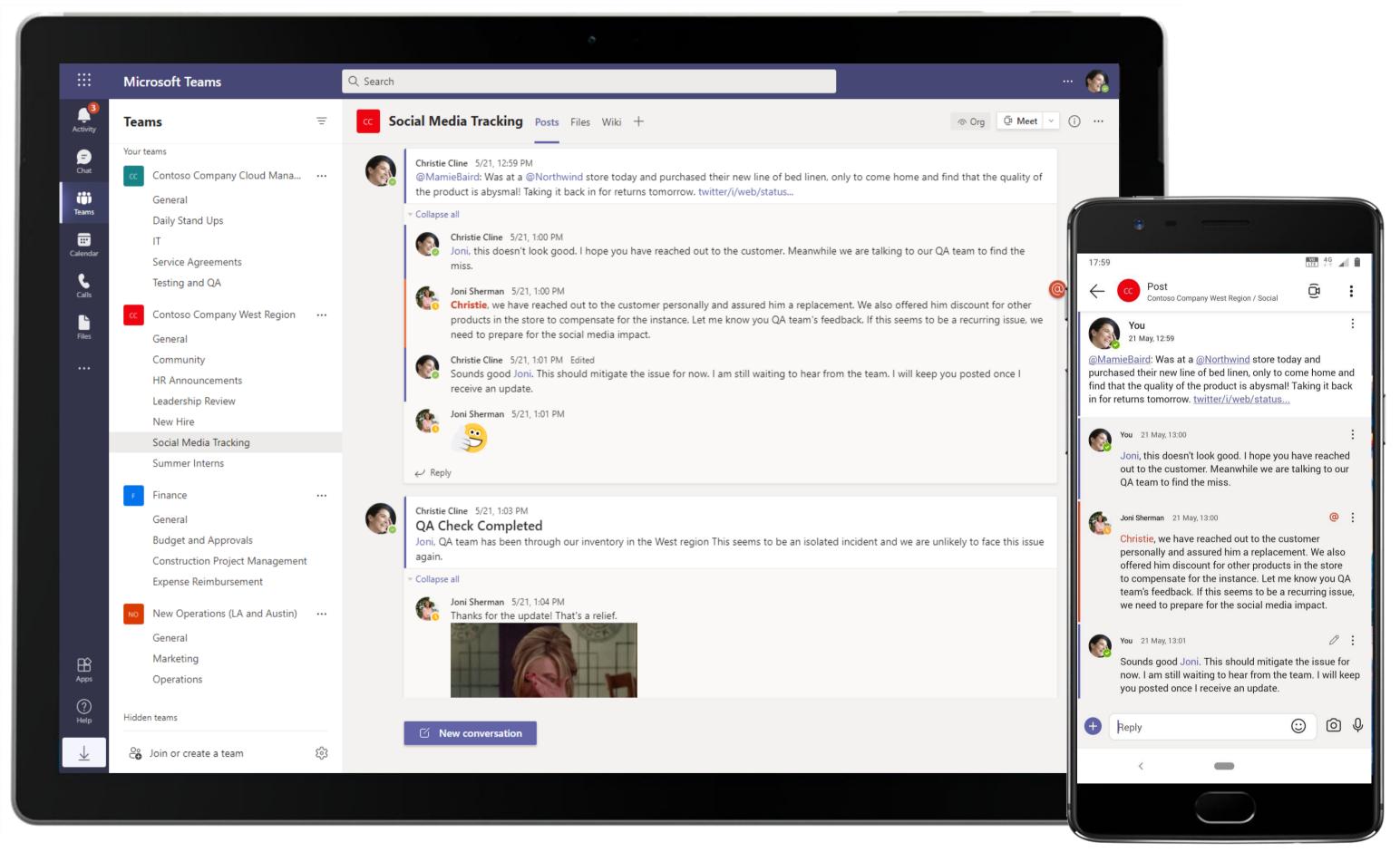
Marketing - Monitoring Negative Responses

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(=) Chat	Ø E	it 🖧 Share 🕏 Save As 前 Delete 🗈 Send	d a copy 🛛 ← Submit as template	🖒 Turn off 🛛 Q Repair tips off				
Teams		lows > Notify a team when a tweet wi						
Calendar		Details			Edit C	onnect	ions	
Galls		Flow Notify a team when a tweet with a hashtag is post	ed	Status On		Ø	Microsoft Teams	ChristieC@M36
Files		Description Notify a channel in Microsoft Teams when a new t	weet with the specified hashtag is	Created May 21, 11:32 AM		y	Twitter	Twitter
Power Auto		posted Owner		Modified May 21, 11:33 AM				
		Christie Cline		Type Automated	C	Owners		
				Plan Per-user plan			Christie Cline	
		Original template 다						
		28-day run history (i)		IIA (Ő	runs			
		When your flow runs, you'll see its history here.						
Apps								
? Help								

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.

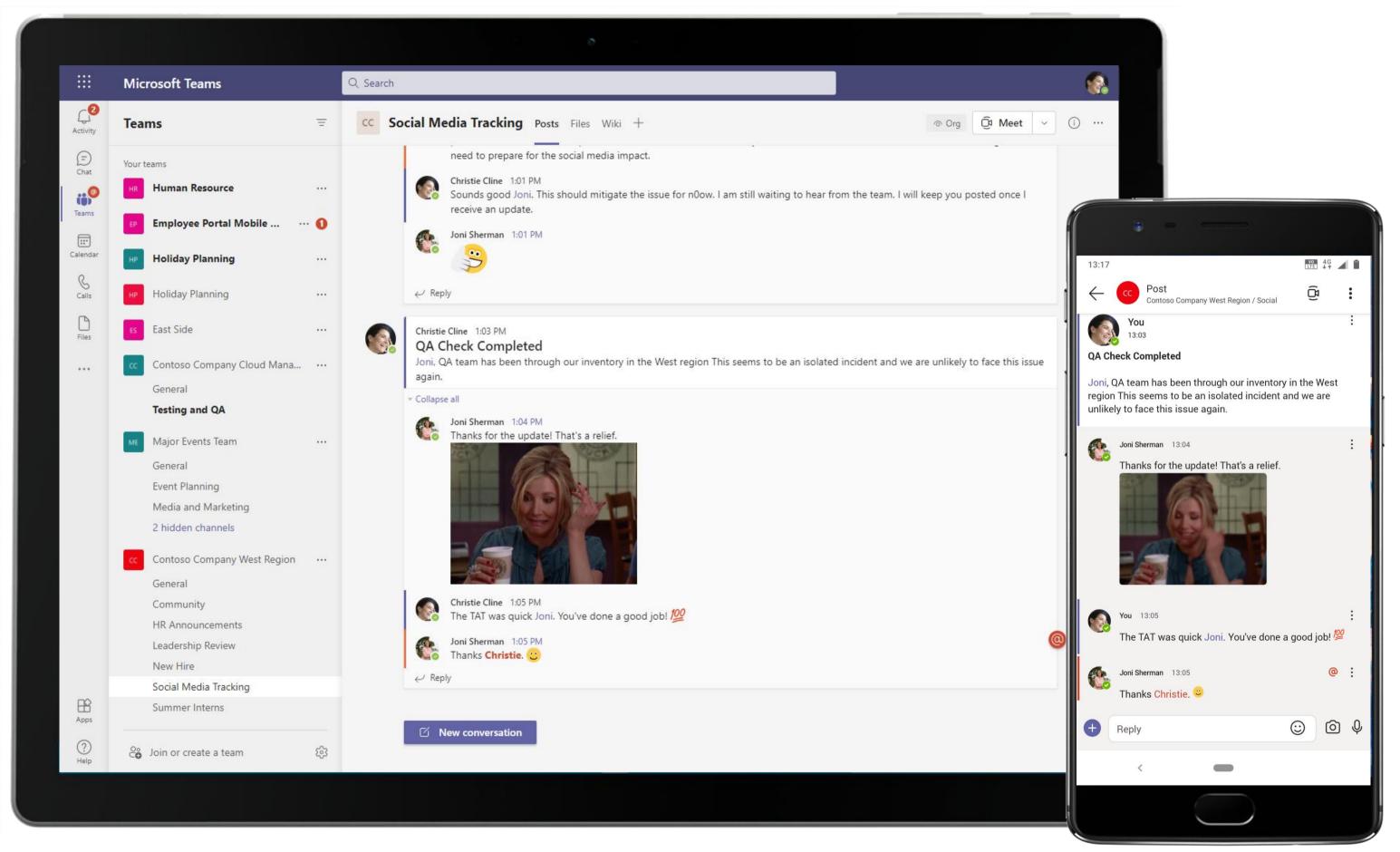






Microsoft Teams offer a seamless connector model, providing notifications and updates from third-party applications such as Twitter. The Marketing Analyst shares the notification in the channel and seeks customer complaint redressal.





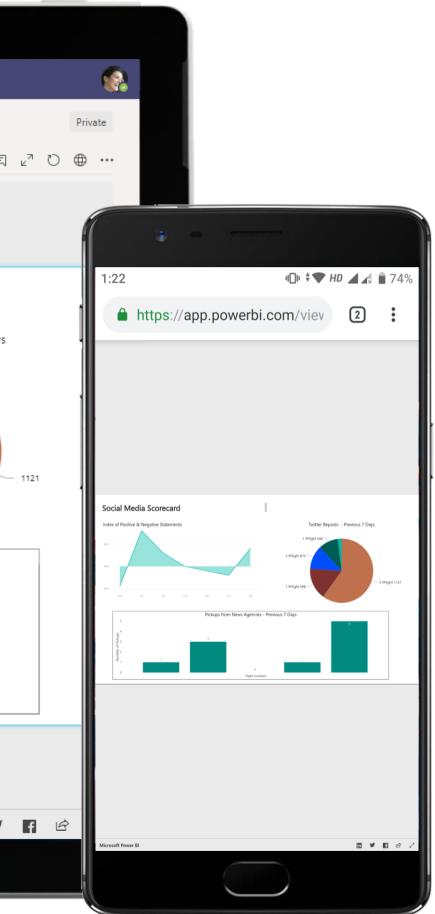
Microsoft Teams conversations are threaded so users can reply directly in-context to specific conversations. The Analyst keeps the team updated in the same thread.



			ð	
	Microsoft Teams	C 🗌	Search or type a command	
Activity	Your teams		Contoso Company West Region > Social Media T	racking ···
Chat	Contoso Company West Region General		Conversations Files Wiki Social Media Scorecard - +	티
eams	Community HR Announcements	1		
E Meetings	Leadership Review New Hire	0		
Files	Social Media Tracking Summer Interns	0	Index of Positive & Negative Statements	Twitter Reposts - Previous 7 Days
	Contoso Company Cloud Mana General			
	Daily Stand Ups IT Service Agreements	0	0.00	873
	Testing and QA Northwind Cloud		-0.05 1/2 1/3 1/4 1/5 1/6 1/7 1/8	998
	General Documents		Pickups from News Agencies - Previous 7 I	Days
	Review Meetings		4	5
	F Finance General	•••	3 3 4 5 4 5 5 6 7 7 7 7 7 7 7 7 7 7 7 7 7	
	Budget and Approvals			1
Get app	HR Human Resource			
Store	General Employee Engagement Employee Referente			
? Help	ະຕີ * Join or create a team	\$	Microsoft Power BI	1

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

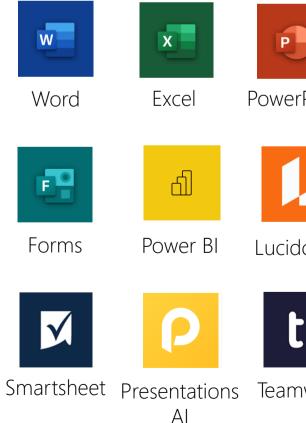
These scenarios will illustrate how Teams can help the IT team communicate effectively to ensure positive business outcomes.

Information Technology Superpowers in Teams

Capabilities and Features used...

- Participate in instant, open-channel communication ٠
- Store documents within a cloud-enabled repository • with Files
- Real-time, contextual file sharing and co-authoring ٠
- 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





	N	•••	<i>.</i>
rPoint	OneNote	Asana	monday.com
		U	Μ
dchart	Trello	Shifts	MURAL
	Jn_	R	
nwork	Adobe Sign	Tasks by Planner and To Do	Communities

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 ٠ managing subcontractors involved with network installation
- Support organization staff in ٠ 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 ٠ activities
- Plan and direct the build, testing ٠ 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.



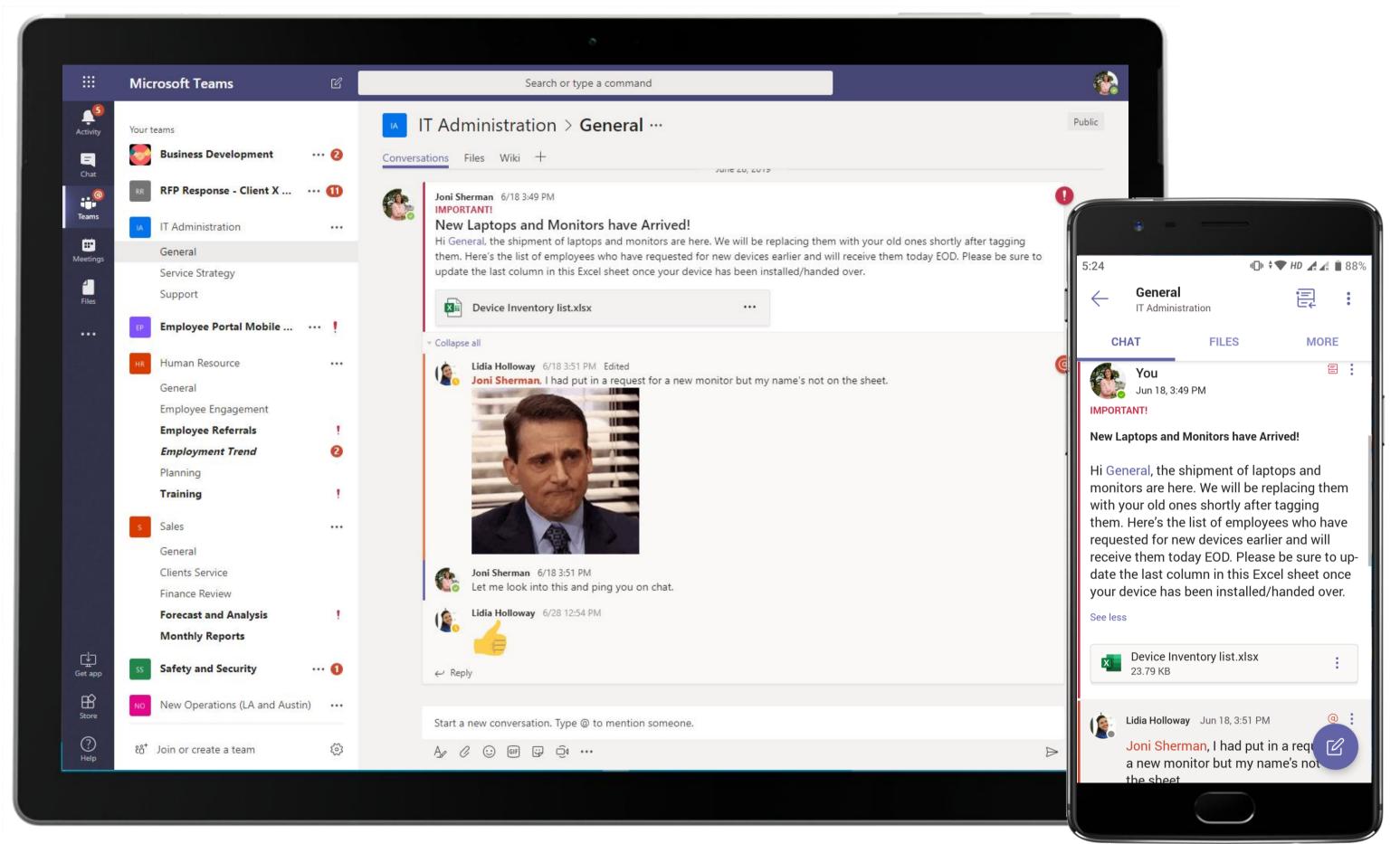
Which app integrations on Teams made it possible?



Excel



Tasks by Planner and To Do



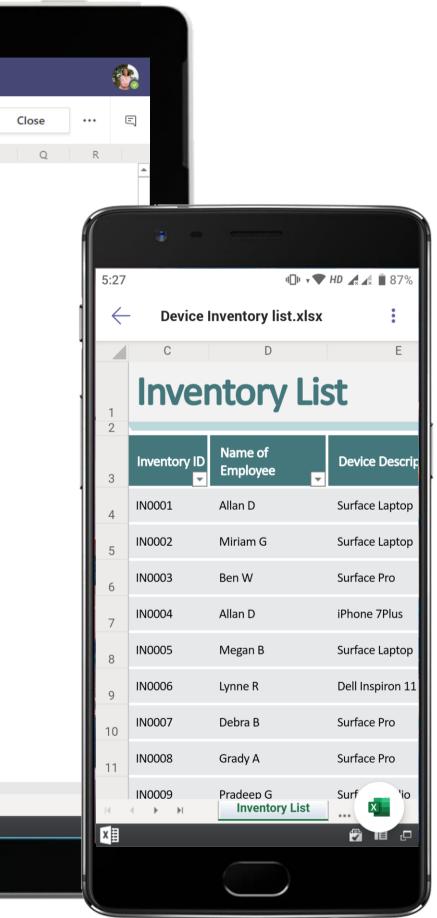
Use channel conversations to relay updates to team members. The IT Manager posts a quick update for team members regarding new devices that they are expecting.



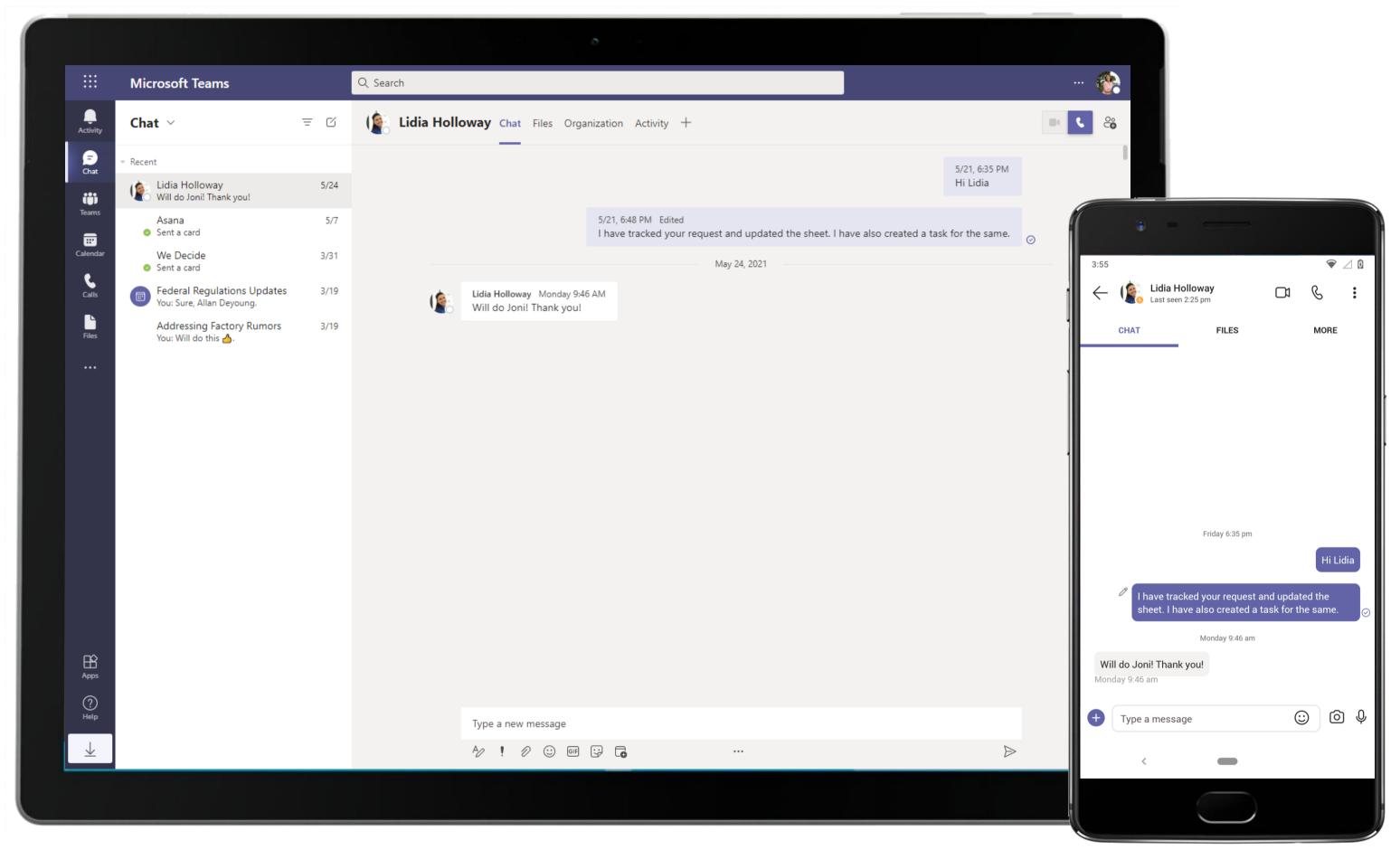
.↓ ⁶		soft Teams											
Activity	×Ħ	Device Inv	entory list.xlsx										Edit
Chat	A B	۔ Inve	ntory L	.ist	F	G	HII	J	К	L	Μ	Ν	0
 Meetings	3	Inventory ID	Name of Employee	Device Description	Unit Price	Quantity in Sposession							
Files	4	IN0001	Allan D	Surface Laptop	\$1,099.00	2							
	5	IN0002	Miriam G	Surface Laptop	\$1,349.00	1							
	6	IN0003	Ben W	Surface Pro	\$800.00	1							
	7	IN0004	Allan D	iPhone 7Plus	\$600.00	2							
	8	IN0005	Megan B	Surface Laptop	\$1,099.00	1							
	9	IN0006	Lynne R	Dell Inspiron 11 3000	\$349.00	1							
	10	IN0007	Debra B	Surface Pro	\$799.00	1							
	11	IN0008	Grady A	Surface Pro	\$1,500.00	2							
	12	IN0009	Pradeep G	Surface Studio	\$2,999.00	2							
	13	IN0010	Emily B	Lenovo Ideapad Flex 5	\$819.00	1							
	14	IN0011	Diego S	Surface Laptop	\$999.00	1							
	15	IN0012	Lidia H	Surface Pro	\$799.00	1							
	16	IN0013	Adele V	Surface Pro	\$799.00	1							
Get app	17	IN0014	Lidia H	iPhone 7Plus	\$600.00	1							
	18	IN0015	Alex W	Surface Pro	\$799.00	1							
Store	4	IN0016	Lee G	Lenovo Ideapad Flex 5	\$819.00	1							
? Help	× • •	H	nventory List	iheet1									

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.





Information Technology - Inventory Tracking



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.

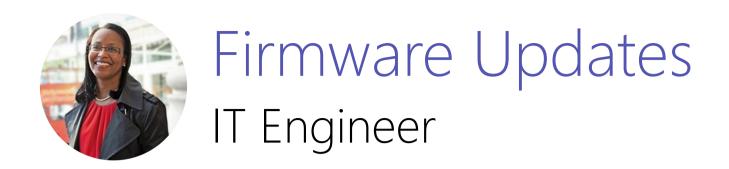


Information Technology - Inventory Tracking

	Microsoft Teams		Q. Search				🚷	
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Calendar	cc Contoso Company Oil General		+ Add task	+ Add task		+ Add task	í	
C alls	Capacity Planning Marketing		Give Admin Access	O Monitor replacement for Lidia		O Service LAN cables	12:44 ←	Tasks by Planner and To Do
Files	Research 1 hidden channel		05/31 Update Firmware	Johanna Lorenz		Create Single Upload Form	0	Printer Fix Johanna Lorenz
	IT Administration General		🖻 05/28				0	Update Firmware
	Deployment Management and Governance Planning		Printer Fix 05/28					E 05/28/2021 Give Admin Access
	Service Strategy Support		Johanna Lorenz					ET 05/31/2021 Create Single Upload Form
	Website Development						0	Monitor replacement for Lidia Johanna Lorenz
	General Customer Services						0	Service LAN cables
	Finance Reviews Forecast and Analysis							
	Monthly Reports Revenue Planning							
? Help	Hidden teams	ŝ					+	Add a task
<u>⊥</u>		~~·						

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.





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. •

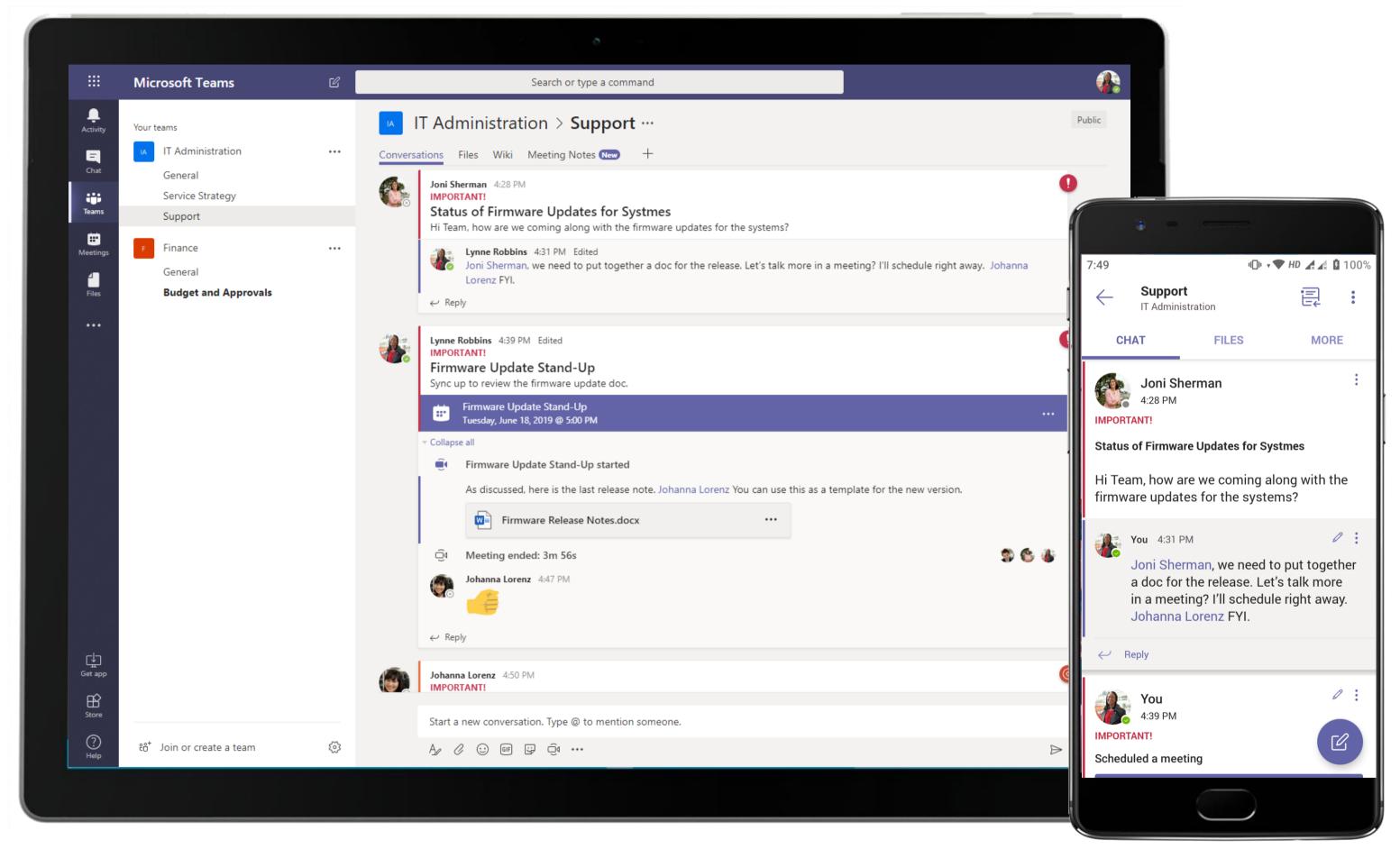
How did Teams help the IT Engineer execute her roles and responsibilities?

- 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?





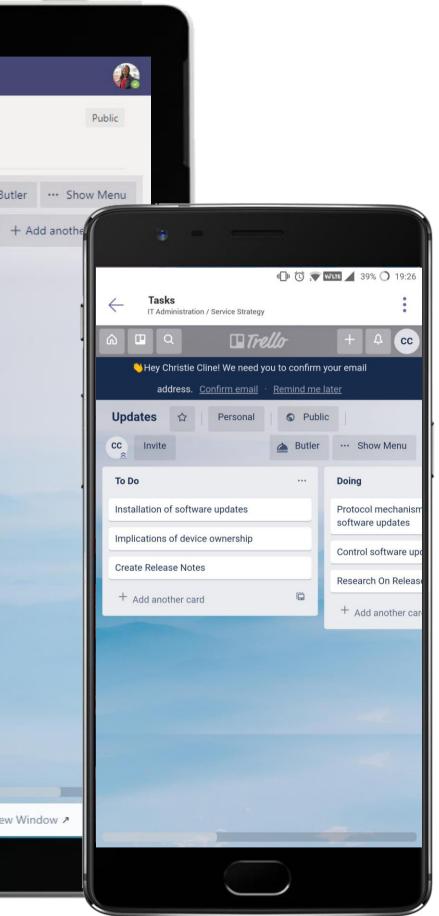
Collaborate with your team through channel communications using @mention to tag required personnel and keep conversations around a specific topic in a single thread. The team schedules meetings and shares files within the same thread.

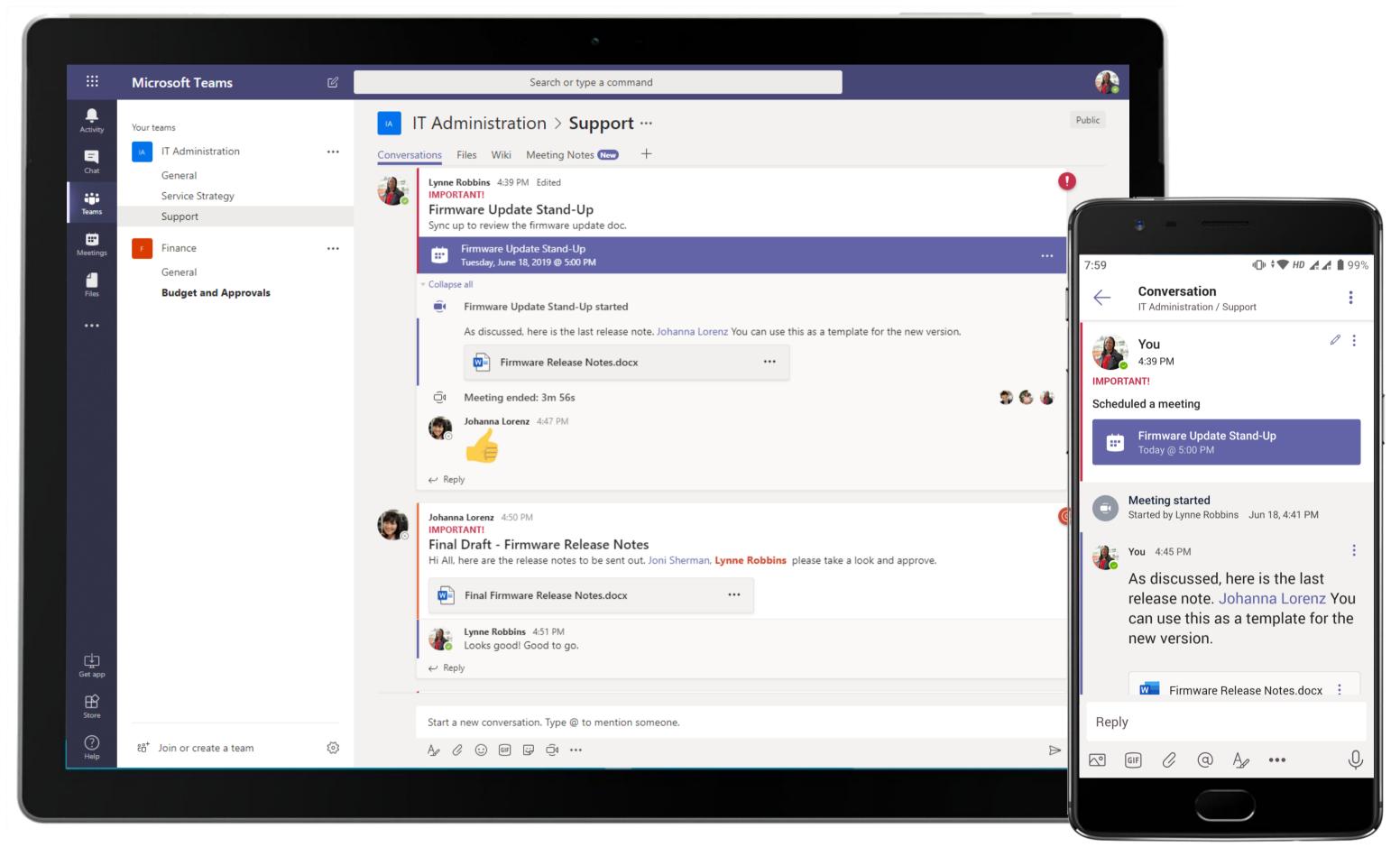


	Microsoft Teams	C	Search or type a command	
Activity Chat Teams Meetings Files	Nicrosoft Teams Vour teams IT Administration General Support Finance General Budget and Approvals		Search or type a command I I Administration > Support Conversations Files Wiki Meeting Notes Tasks < + Updates Personal Public C Invite To Do Installation of software updates Implications of device ownership Create Release Notes + Add another card	
Get app Store				

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.

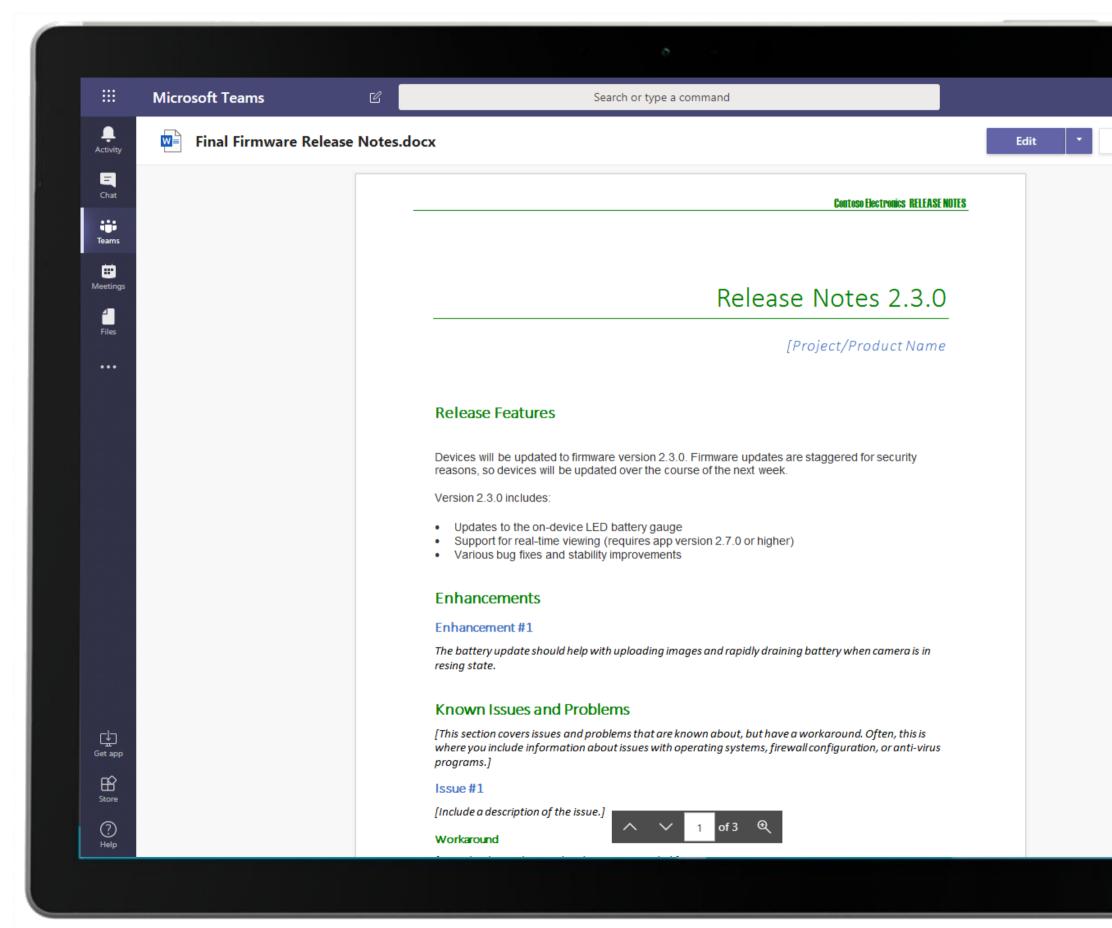






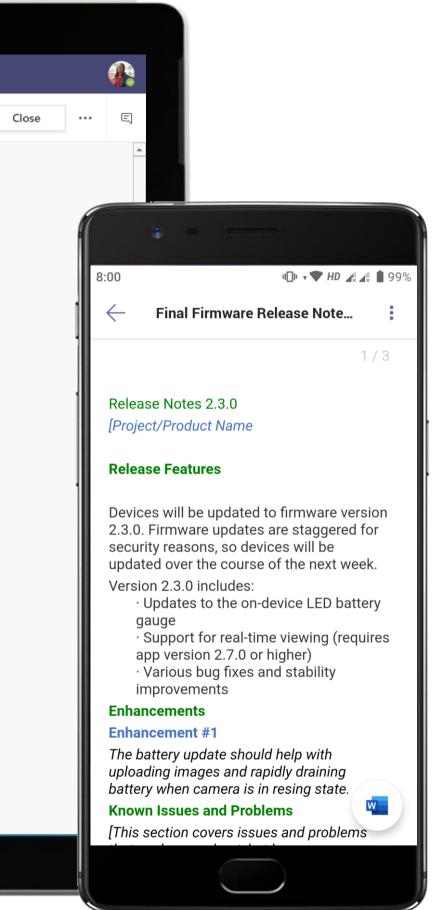
Microsoft Teams conversations are threaded so users can reply directly in-context to specific conversations, while keeping relevant discussions and files grouped together.





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.







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?

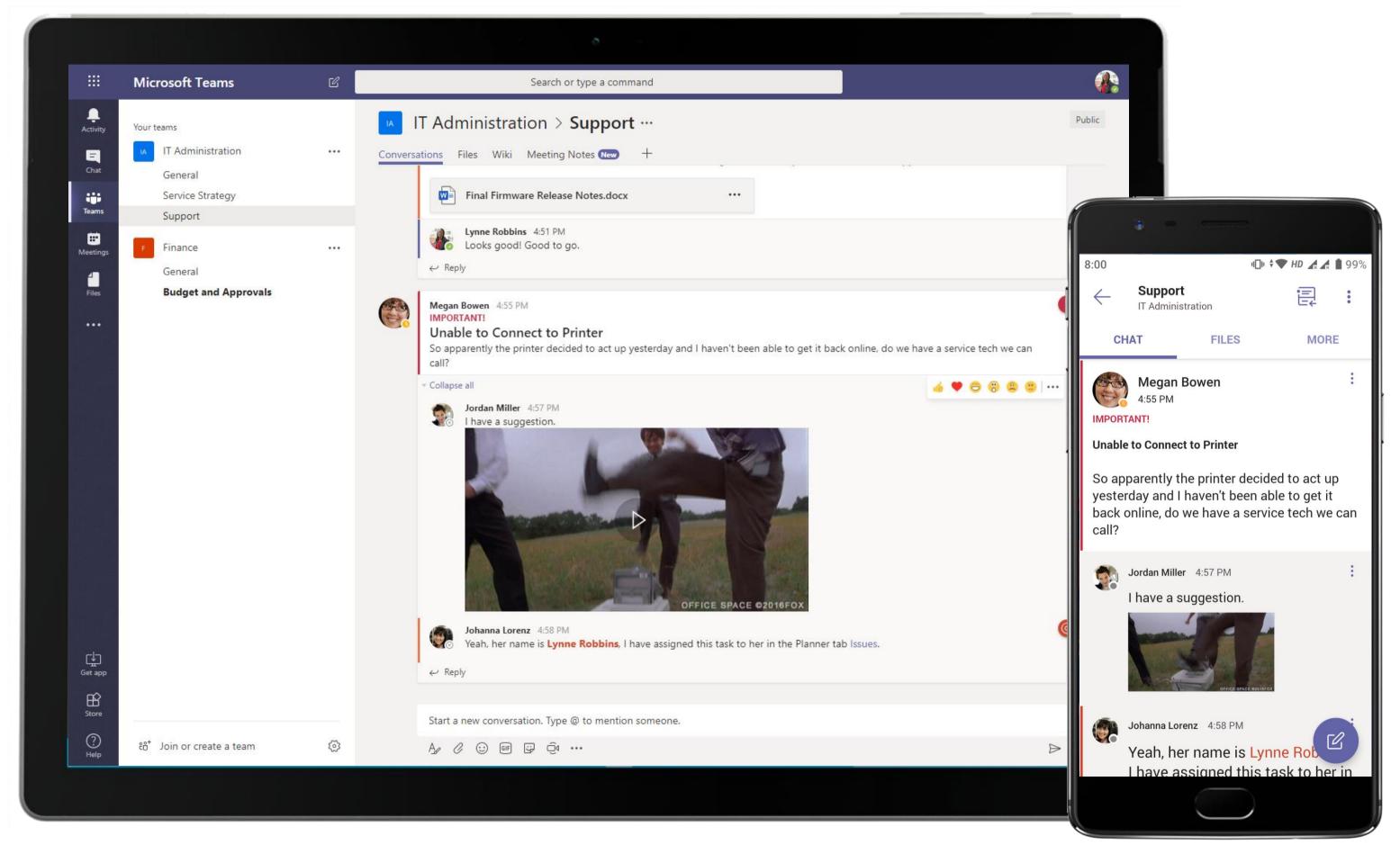
- Use a dedicated team to log tickets and initiate conversation.
- Personal 1:1 and channel conversations to gain clarity on the issue with Files tab to • store documents.
- Secure meeting calls with screen share right inside Teams. •
- Use ServiceDesk Plus Cloud to log tickets and initiate a conversation.



Which app integrations on Teams made it possible?



Information Technology - Troubleshooting & Repairs



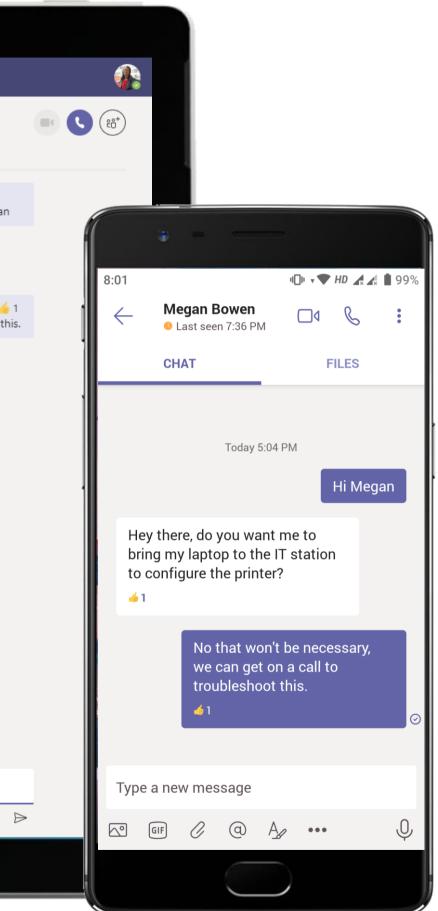
Not sure whom to reach out to when you need support? The IT Admin team at Contoso has Support channels (per site or department) for team members to reach out to them and engage for quicker resolution of queries.



	Microsoft Teams 🛛 🖄		Search or type a command		
L. Activity	Recent Contacts	🚱 Mega	in Bowen		
= Chat	Recent Megan Bowen 5:07 PM You: No that won't be necessary, we ca	Conversation F	iles Organization Activity +		
iii Teams	Planner 1:25 PM Task "Tech Support for the Event"				5:04 PM Hi Mega
	Suggested	(Megan Bowen 5:05 PM Hey there, do you want me to bring my laptop	o to the IT station to configure the printer?	
Files	💿			5:07 PM No that won't be necessary, we can get on a call to	troubleshoot
•••	Piego Siciliani				
	DH Don Howes				
	💽 Emily Braun				
	Enrico Cattaneo				
	Henrietta Mueller				
	Irvin Sayers				
	Johanna Lorenz				
	Soni Sherman				
¢	[Lidia Holloway				
Get app	🚱 Miriam Graham				
Store	Restor Wilke		Type a new message		
() Help			A₂ ℓ ∵ ☞ ټ ⇔ …		

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.



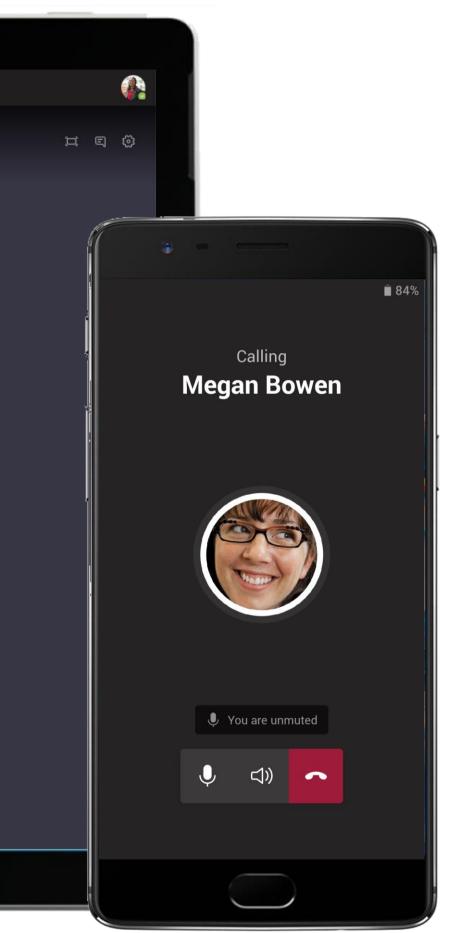


Information Technology - Troubleshooting & Repairs

	Microsoft Teams	Ľ	Search or type a command	
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			Calling	
			Megan Bowen	
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Complete meeting solutions in Teams support screen sharing, recording, video and audio conferencing. Scheduling Assistant feature suggests times that are optimal for all attendees.

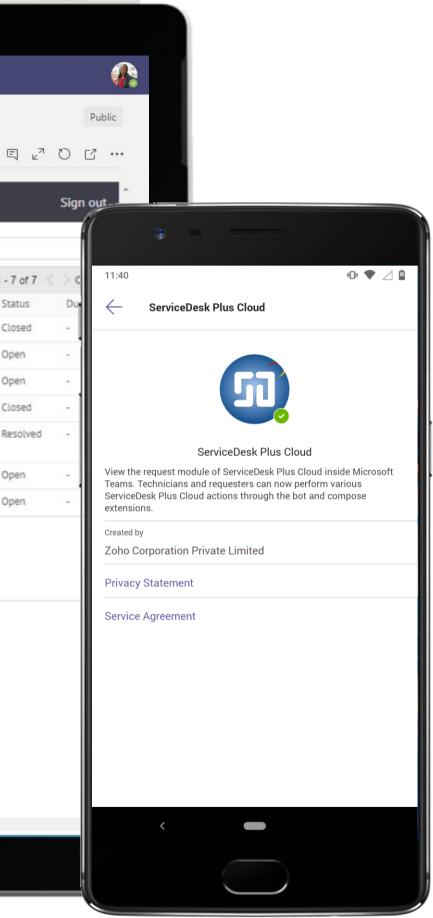




	Microsoft Teams	Ľ	Search or type a command				
Ļ Activity	Your teams		IT Administration > Service Strategy …				
	IT Administration		Conversations Files Wiki Issues - +				(
Chat	General						
Teams	Service Strategy		Contoso				
Meetings	Support Finance		All My Requests 🕞 🕂 New Custom View			Filter :	Ail
	General		New Incident Edit Delete Pick Up Close Merge Link Requests	Assign *	Showing	Last 3	. 1-
Files	Budget and Approvals		ld Subject	Requester Name	Technician	Group	St
			🔲 📾 🕞 🖉 7 🕞 Printer Fix	Megan Bowen	Lynne Robbins		C
•••			🔲 🖾 🗇 🦉 6 🔛 Monitor Replacement	Christie Cline	Patti Fernandes		0
			🔲 🖾 🕞 🖉 5 🕞 Connectivity issues in meeting room 4A.	Allan Deyoung	Patti Fernandes		0
			🔲 🖾 🗊 🖉 4 💿 VPN Issue	Adele Vance	Patti Fernandes	<u>5</u>	C
			Request expiry date extension for mobile test device	Megan Bowen	Patti Fernandes		R
			📄 🖾 🗁 🖉 2 🧼 Lights in the lift keep fluctuating	Megan Bowen	Patti Fernandes		0
			📄 🖾 🔍 🧷 1 💦 Exterior of the building needs paint	Patti Fernandes	Patti Fernandes	-	0
			Copyright © 2019 ZOHO Corporat	tion. All rights reserv	ed		
Get app							
Store							
? _{Help}	ిం [*] Join or create a team	\$	4				

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

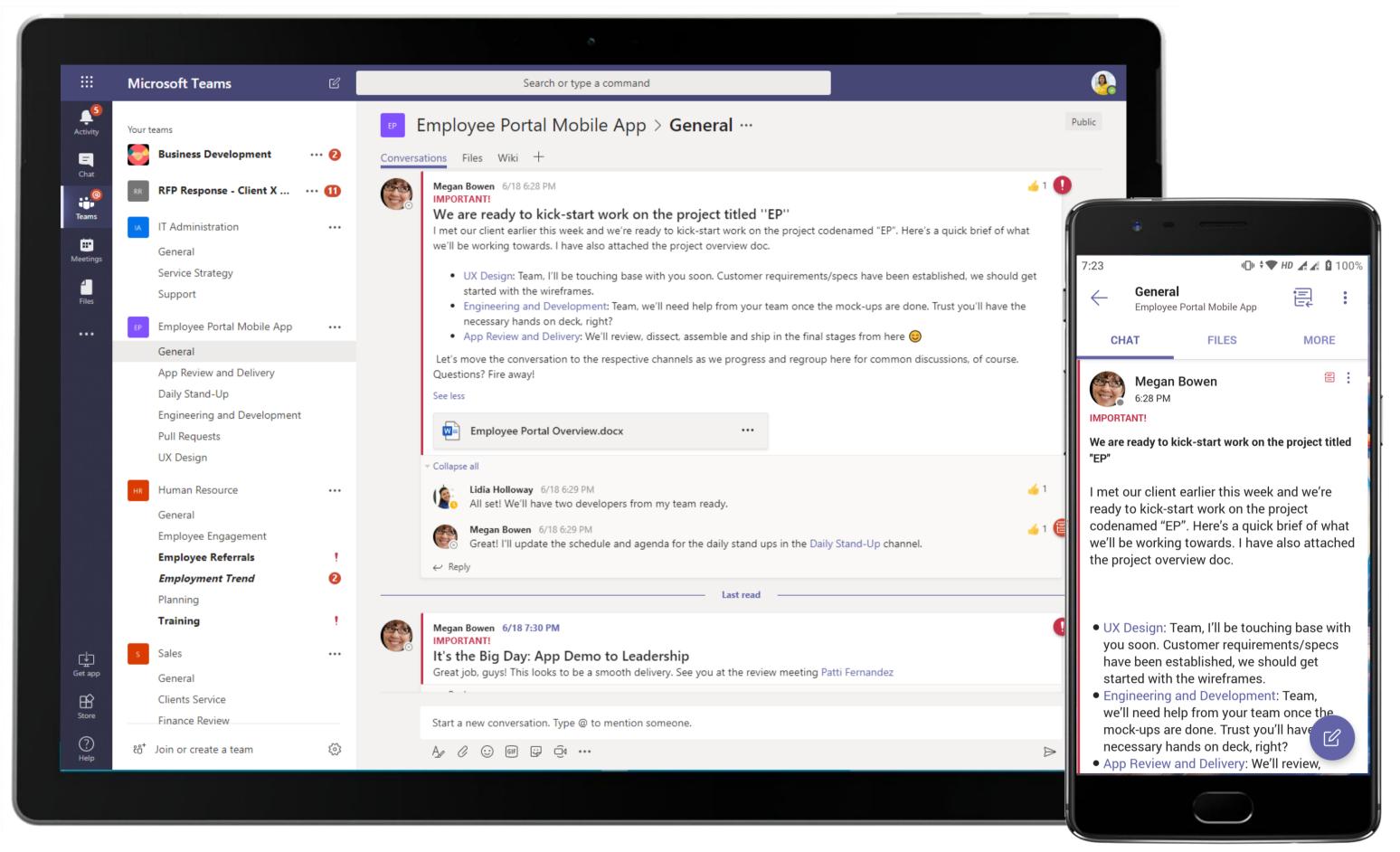
How did Teams help the Engineering Manager execute her roles and responsibilities?

- 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?

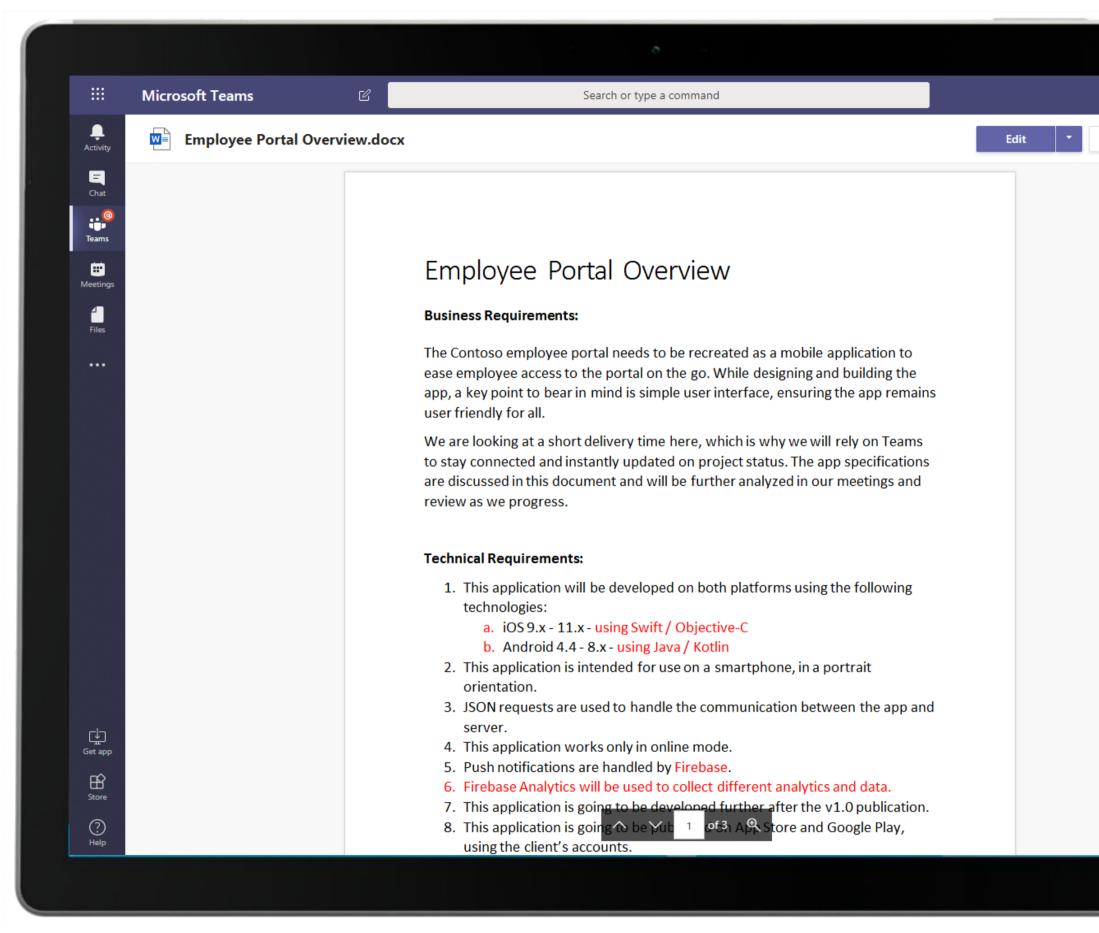






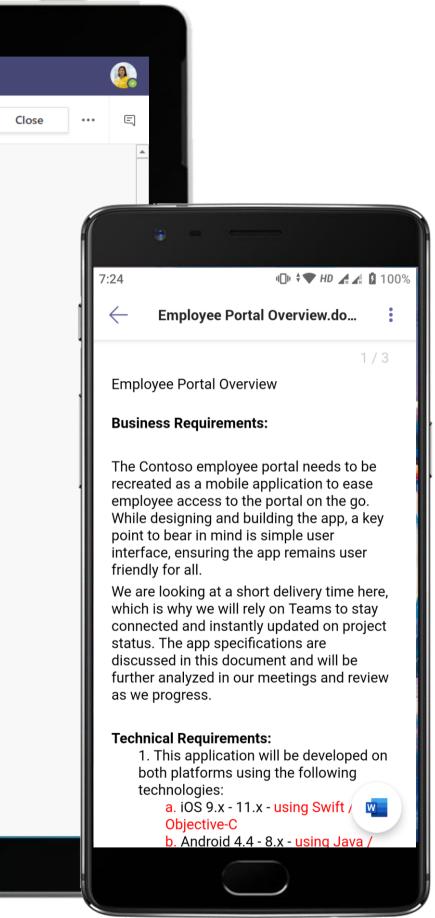
Use channel conversations to relay updates to team members and begin a process flow for task completion. The Engineering Manager kick-starts a process flow and defines the channels and participants that will take the process forward.

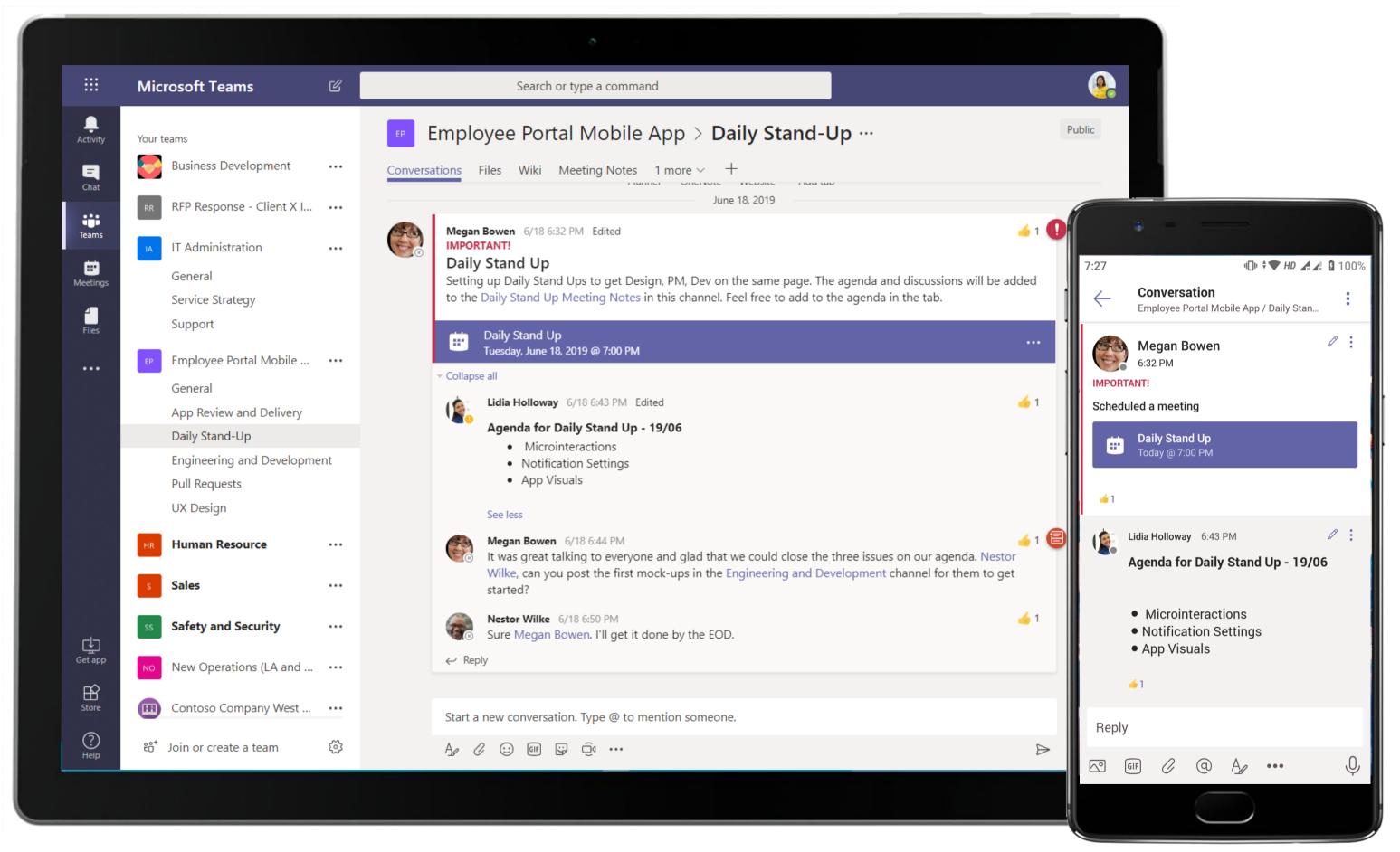




She collaborates with the Product team and shares her spec doc within the channel conversation. The spec is a Word document containing the project details for team members. This provides shared context to the entire team.







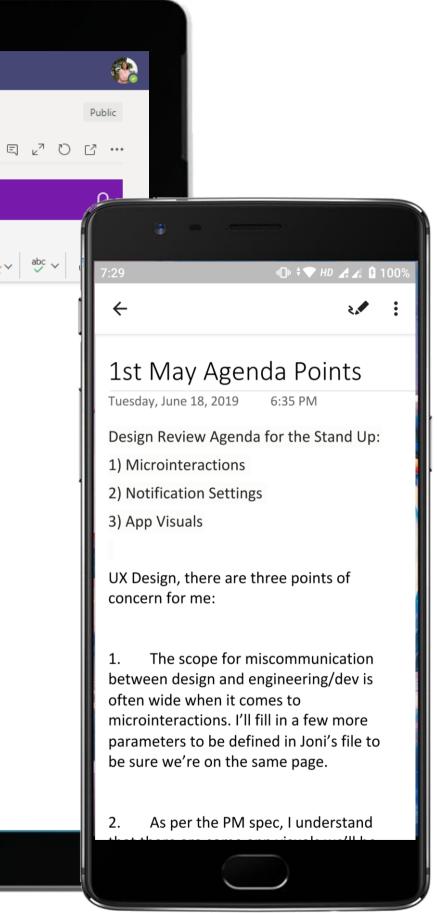
Easily schedule meetings and find the best available times for invitees through the native scheduling calendar. The Manager uses this feature to set up a daily team sync. Remote team members join the stand-up through online meeting.



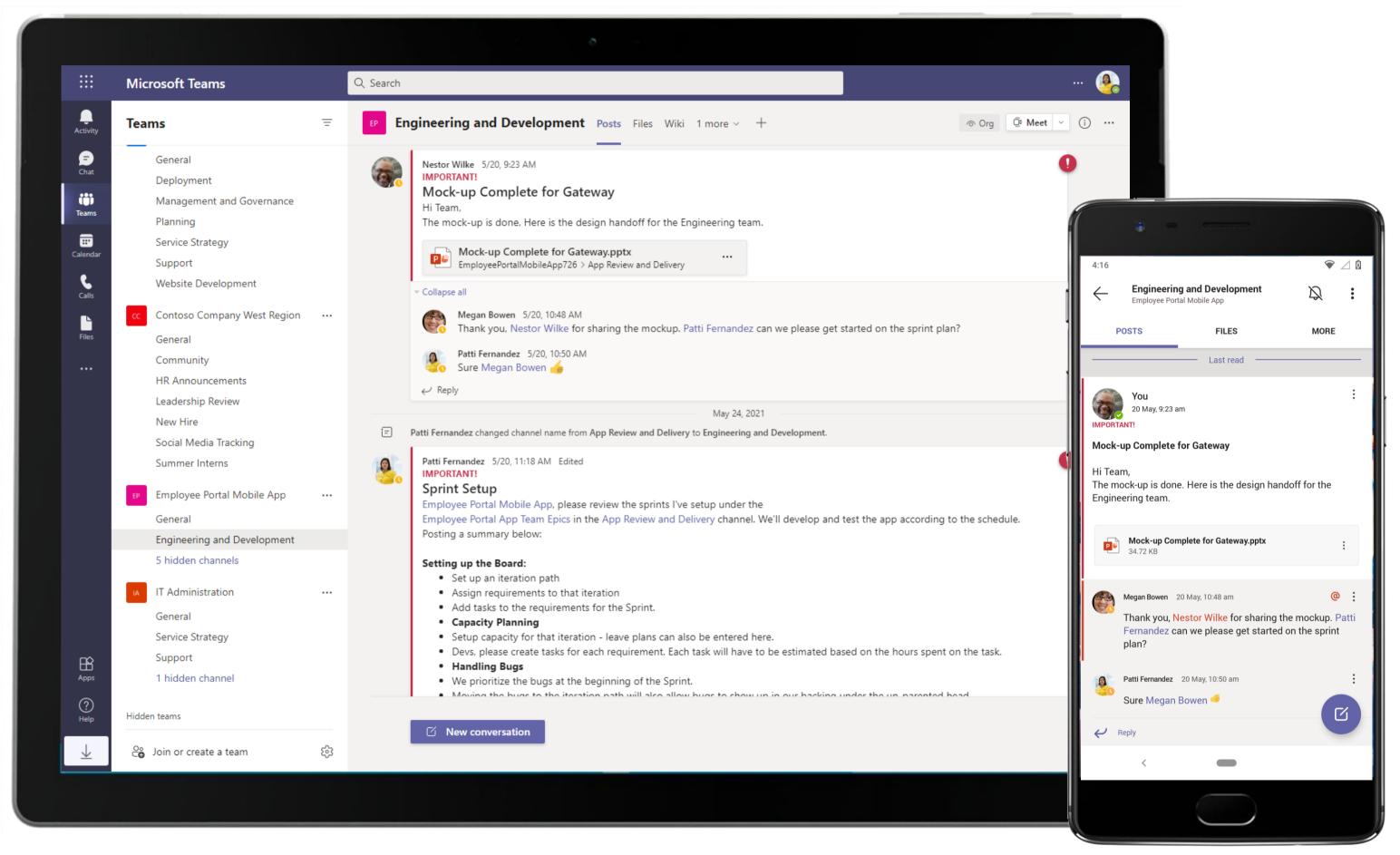
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Collaborative and powerful document creation with OneNote in Microsoft Teams. Quickly disseminate meeting outcome, notes and action items among team members with OneNote tabs that can be pinned to any channel.





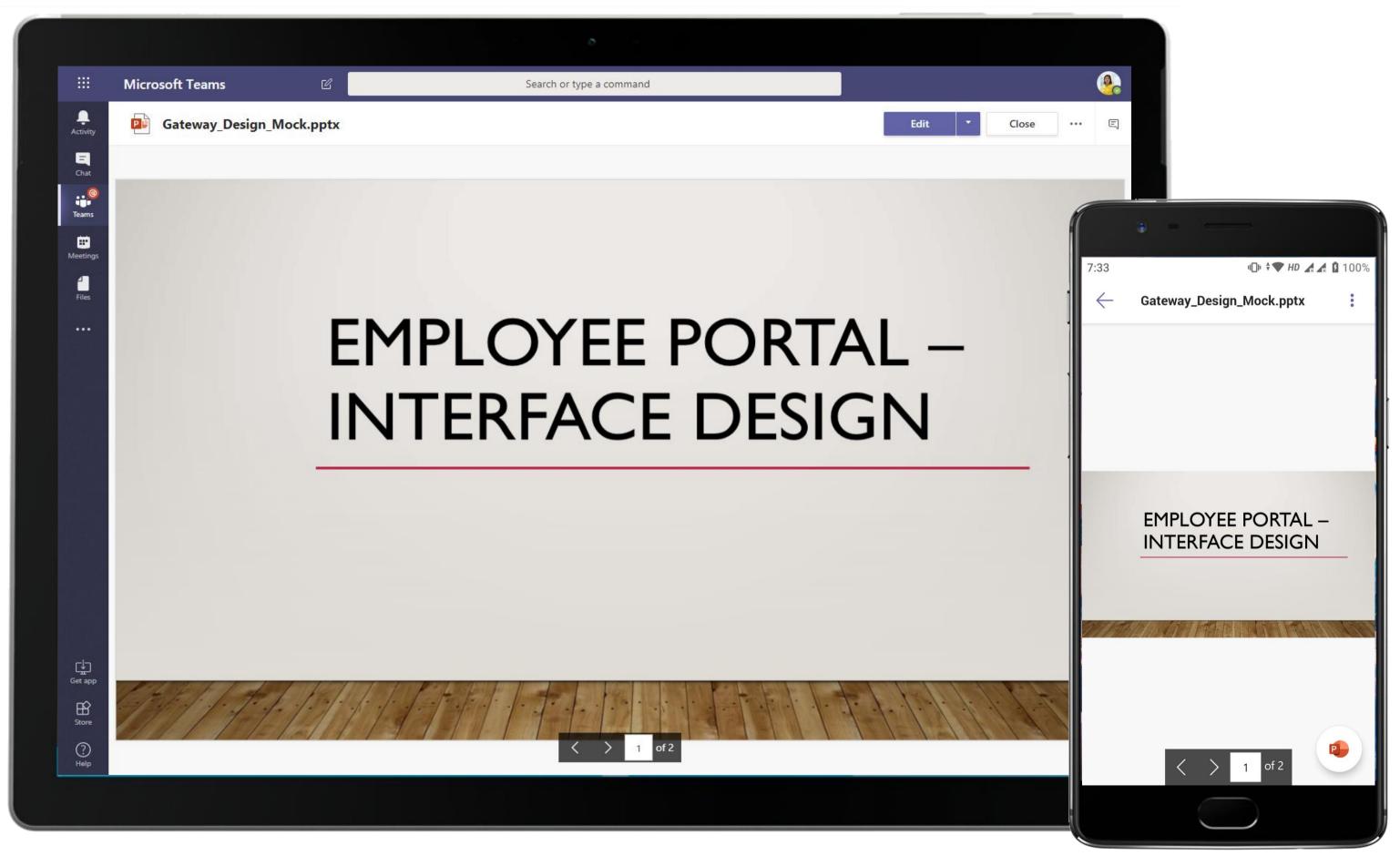
Information Technology - Developing a Mobile Application



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.



Information Technology - Developing a Mobile Application



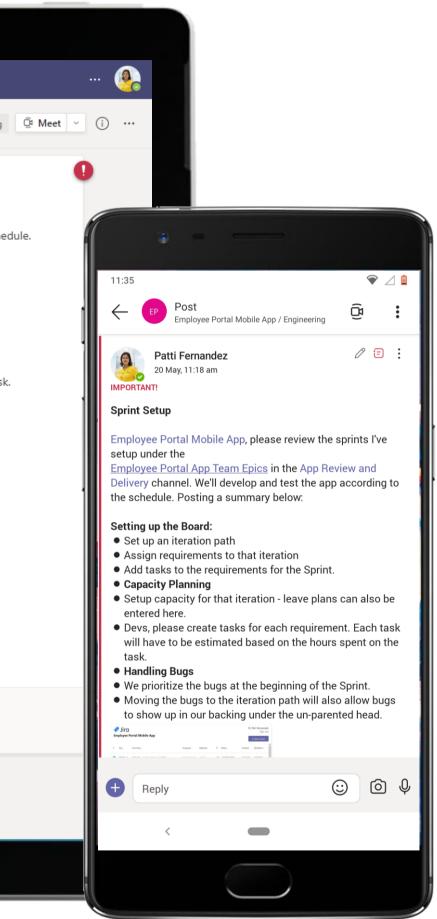
Store and share important files within a protected, cloud-enabled repository with Files. Design documents such as the PowerPoint containing mocks of the app and spec documents are housed here for the team's easy access.



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Calendar Calendar Calendar	General Deployment Management and Governance Planning Service Strategy Support Website Development Contoso Company West Region General Community HR Announcements Leadership Review New Hire Social Media Tracking Summer Interns EP Employee Portal Mobile App General Engineering and Development 5 hidden channels IT Administration General		Patti Fernandez: 5/20, 11:18 AM. Edited MMPORTANTI Sprint Setup Employee Portal Mobile App, please review the sprints I've setup under the Employee Portal App Team Epics in the App Review and Delivery channel. We'll develop and test the app according to the sch Posting a summary below: Setup an iteration path Add tasks to the requirements to that iteration Add tasks to the requirements for the Sprint. Setup capacity for that iteration - leave plans can also be entered here. Devs, please create tasks for each requirement. Each task will have to be estimated based on the hours spent on the task Handling Bug We prioritize the bugs at the beginning of the Sprint. Moving the bugs to the iteration path will also allow bugs to show up in our backing under the un-parented head. Implayee Portal Mobile App We prioritize the bugs at the beginning of the Sprint. Moving the bugs to the iteration path will also allow bugs to show up in our backing under the un-parented head. Implayee Portal Mobile App Weingerie frame Weingerie water with the weingerie water with the weingerie water water with the weingerie water wa
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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.



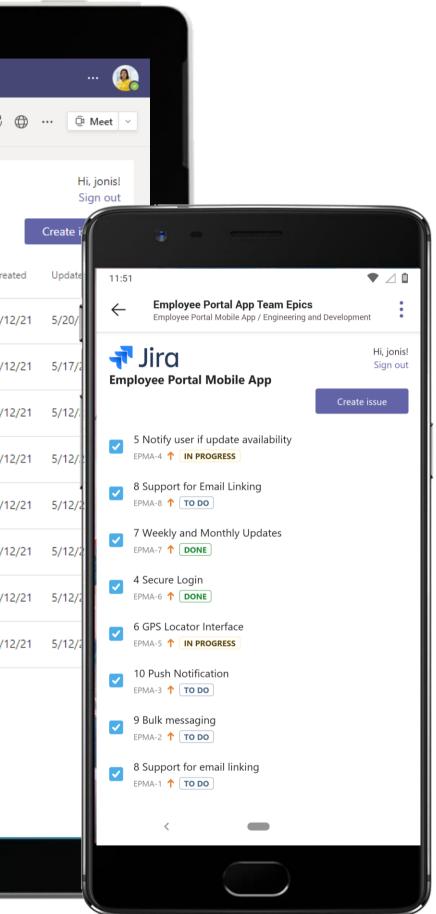


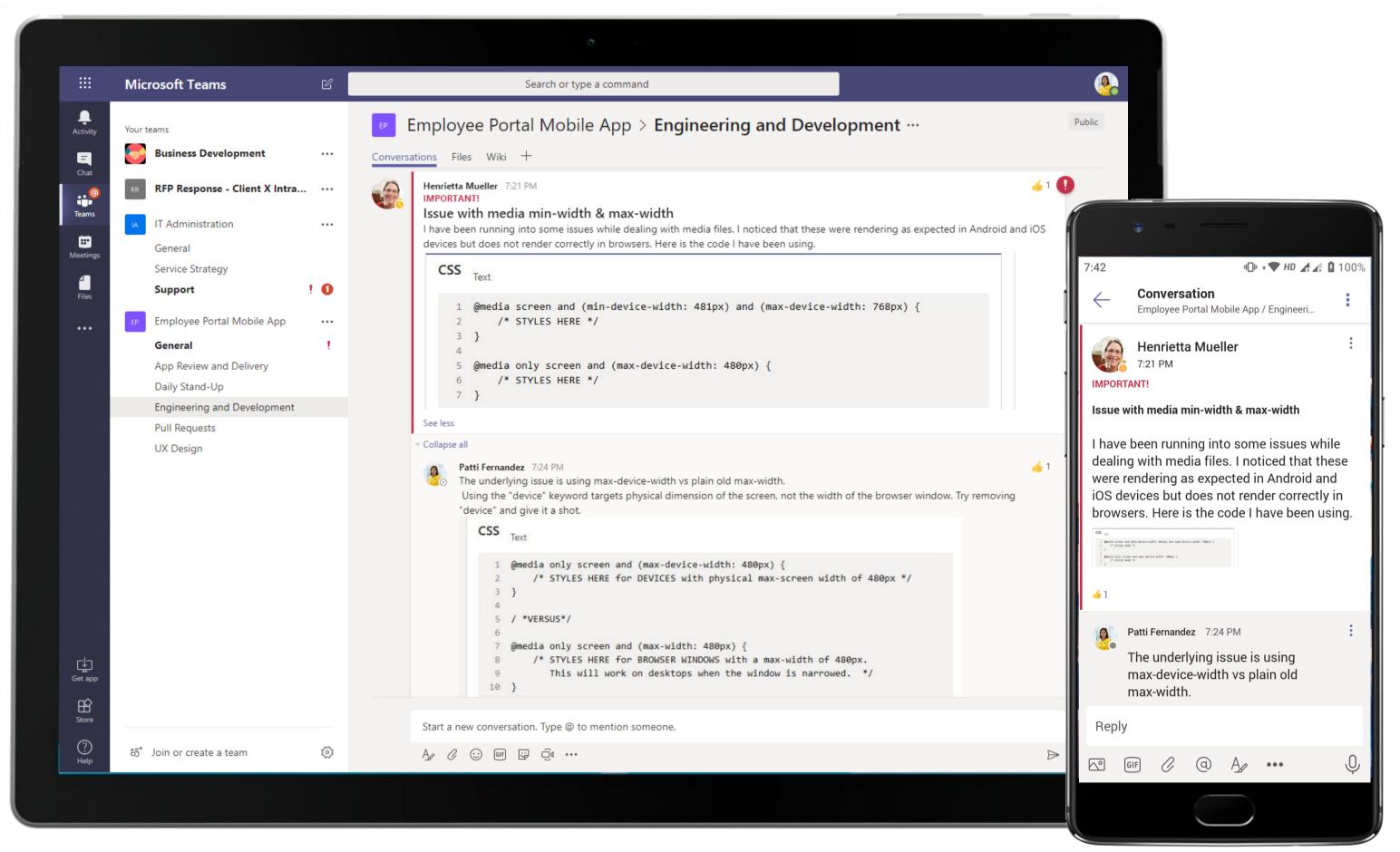
Information Technology - Developing a Mobile Application

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







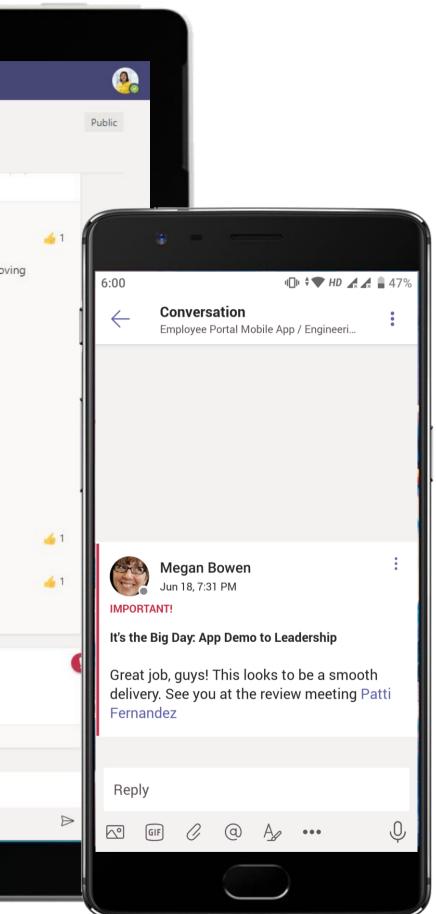
As the Engineering team rallies to close out bugs and complete the project, channel conversations provide the platform to air out issues and update managers about the hurdles they come across.



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Activity	Your teams Business Development		EP Employee Portal Mobile App > Engineering and Development … Conversations Files Wiki +
Chat Teams Meetings	RFP Response - Client X Intra IT Administration General Service Strategy	 	See less Collapse all Image: See less Patti Fernandez 7:24 PM The underlying issue is using max-device-width vs plain old max-width. Using the "device" keyword targets physical dimension of the screen, not the width of the browser window. Try remo "device" and give it a shot.
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Get app Store Help	čö⁺ Join or create a team	8	Megan Bowen 7:31 PM IMPORTANT! It's the Big Day: App Demo to Leadership Great job, guys! This looks to be a smooth delivery. See you at the review meeting Patti Fernandez ← Reply Start a new conversation. Type @ to mention someone. ▲ ② ③ 圖 ☑ ④ …

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.



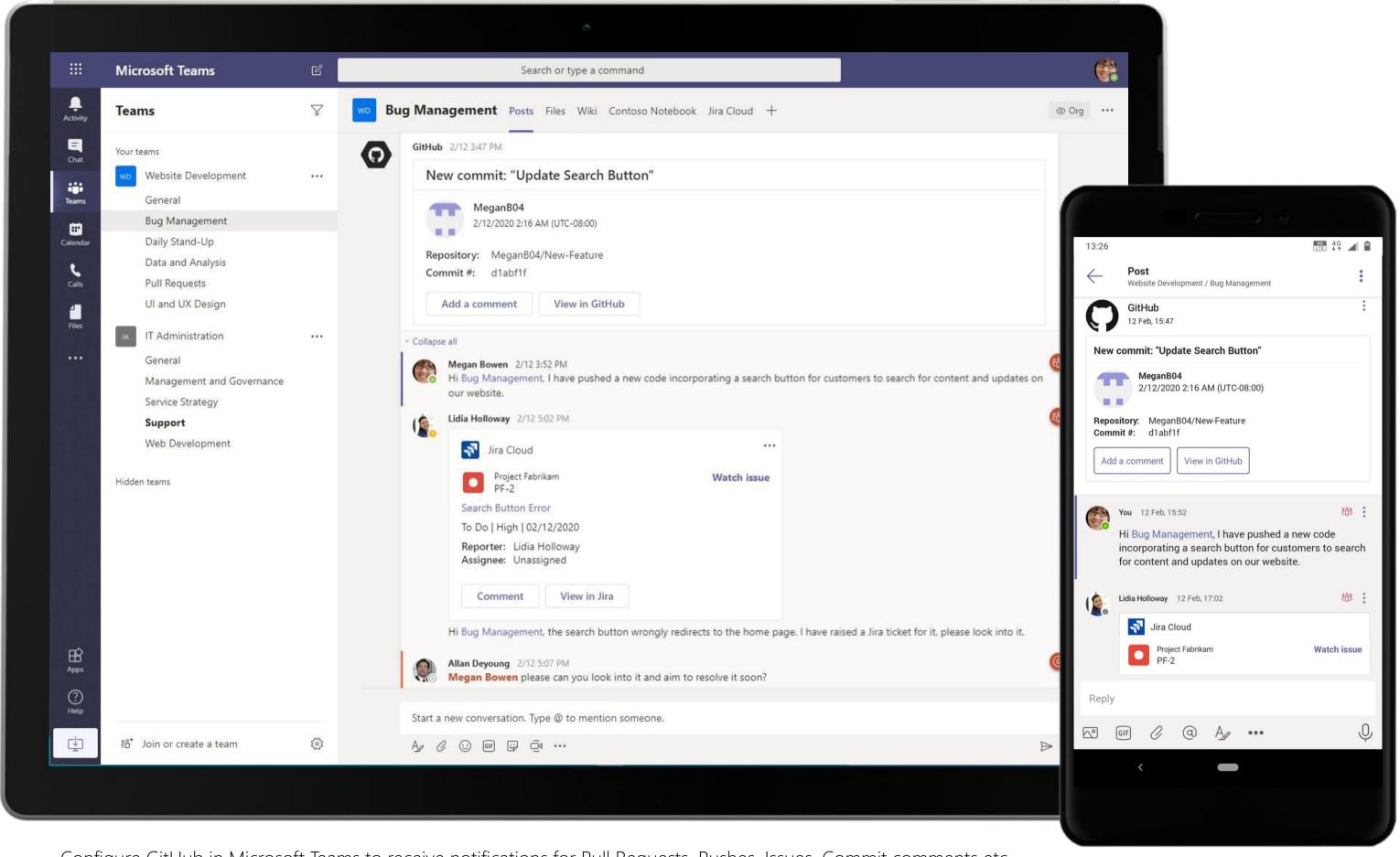
Which app integrations on Teams made it possible?



GitHub

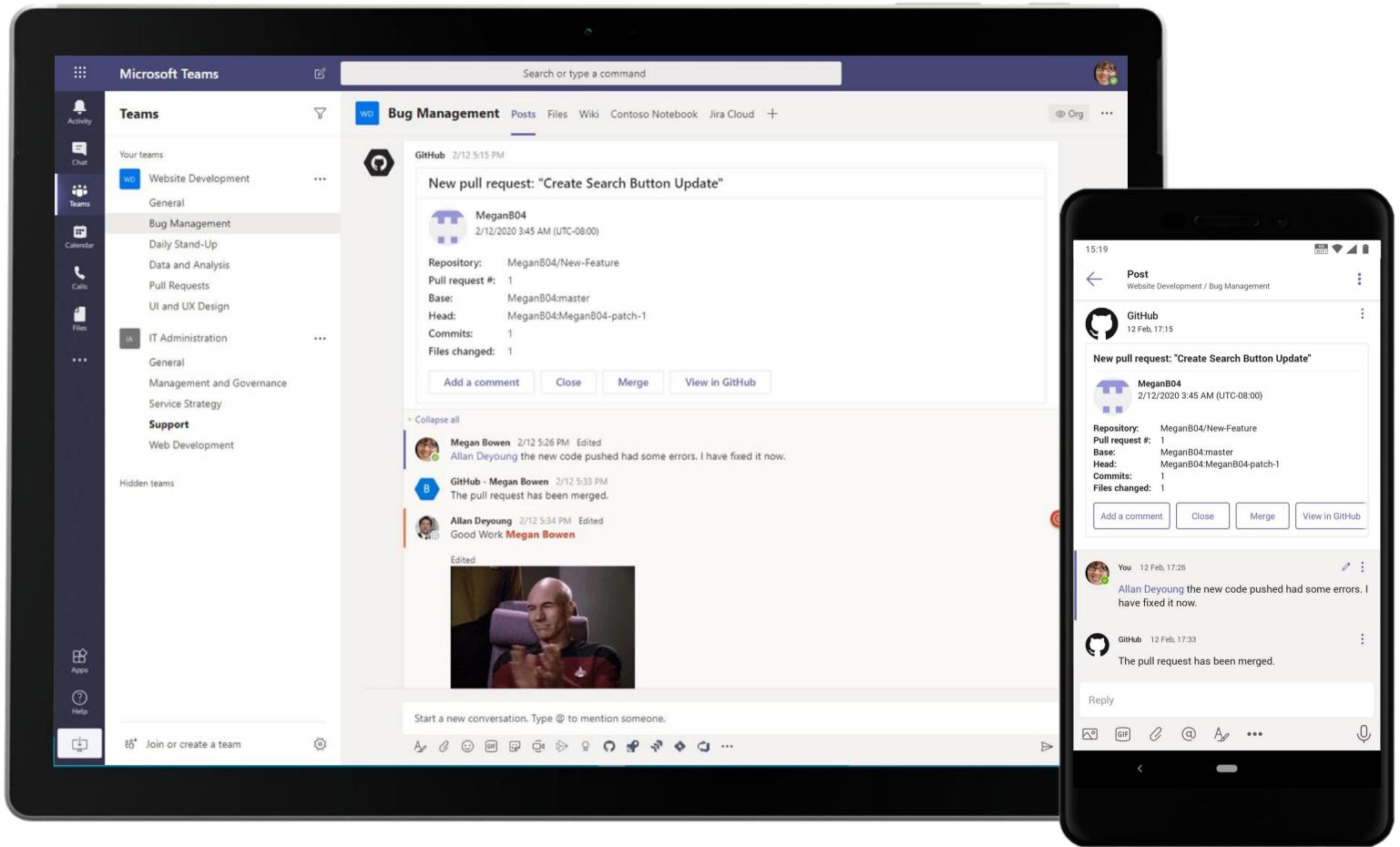


Jira Cloud



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.





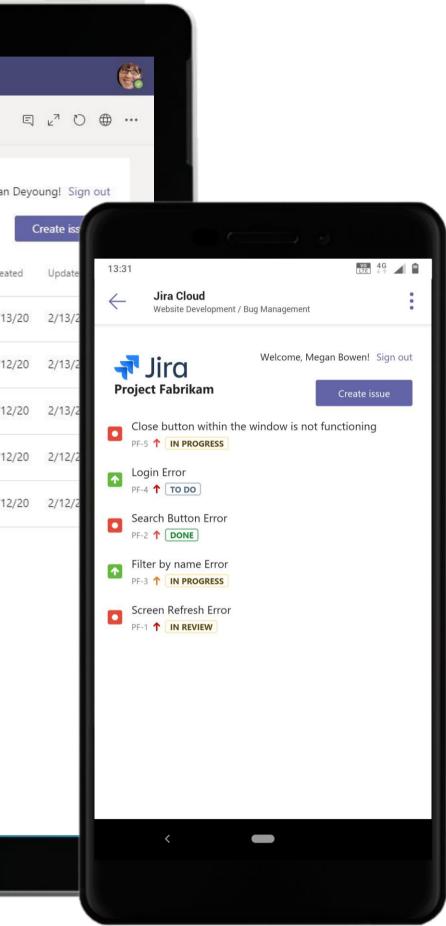
As the Developer gets notified about a new Pull Request, she fixes the errors and alerts the Tech Lead @mentioning him in the channel.



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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.

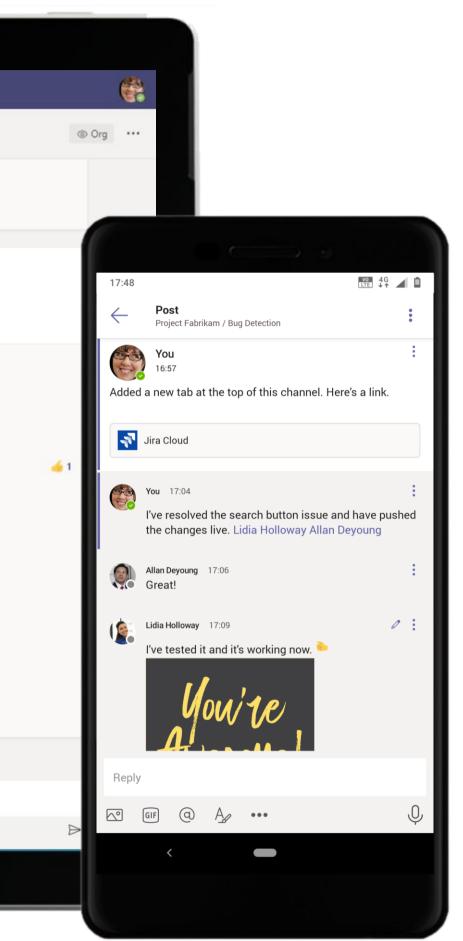




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Files	UI and UX Design IT Administration General Management and Governance Service Strategy Support Web Development Hidden teams	•••	 Collepse all Megan Bowen 5:04 PM The resolved the search button issue and have pushed the changes live. Lidia Holloway Allan Deyoung Alan Deyoung 5:06 PM Grad! Kidla Holloway 5:09 PM Edited The tested it and it's working now.
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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

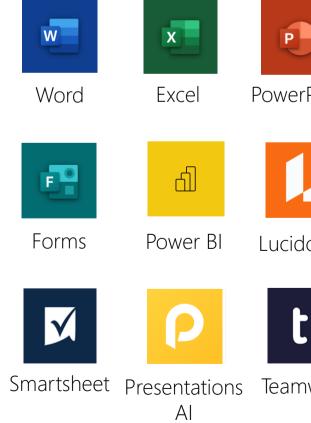
These scenarios will illustrate how Teams can help different Finance roles in quickly turning data into actionable insights, automating manual and repetitive processes and driving better decisions through collaboration.

Finance & Accounts Superpowers in Teams

Capabilities and Features used...

- Hold remote presentations over protected video ٠ conferences
- Participate in instant, open-channel communication ٠
- Store documents within a cloud-enabled repository ٠ with Files
- Real-time, contextual file sharing and co-authoring ٠
- 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





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rPoint	OneNote	Asana	monday.com
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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.

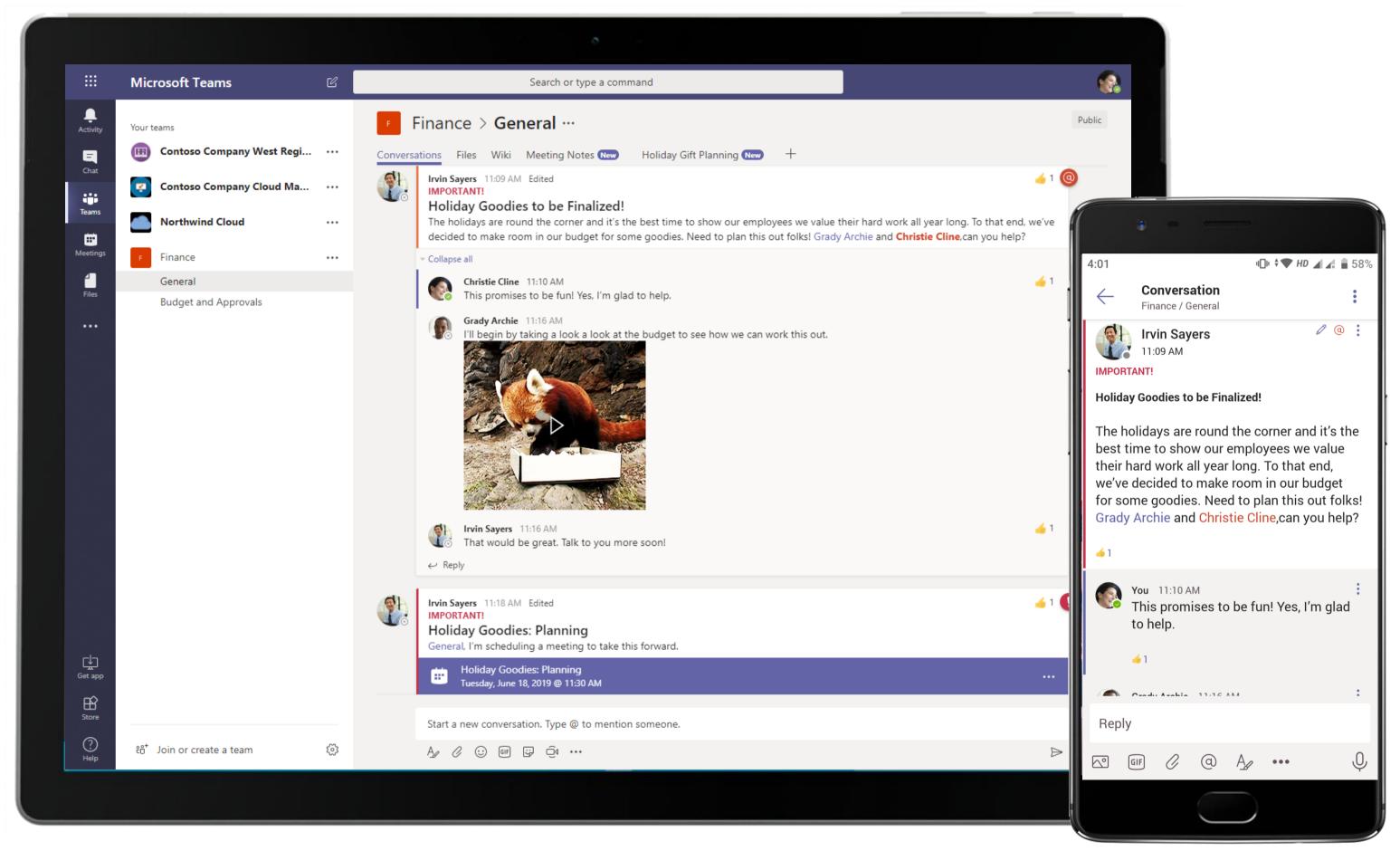
How did Teams help the Financial Associate execute her roles and responsibilities?

- @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.



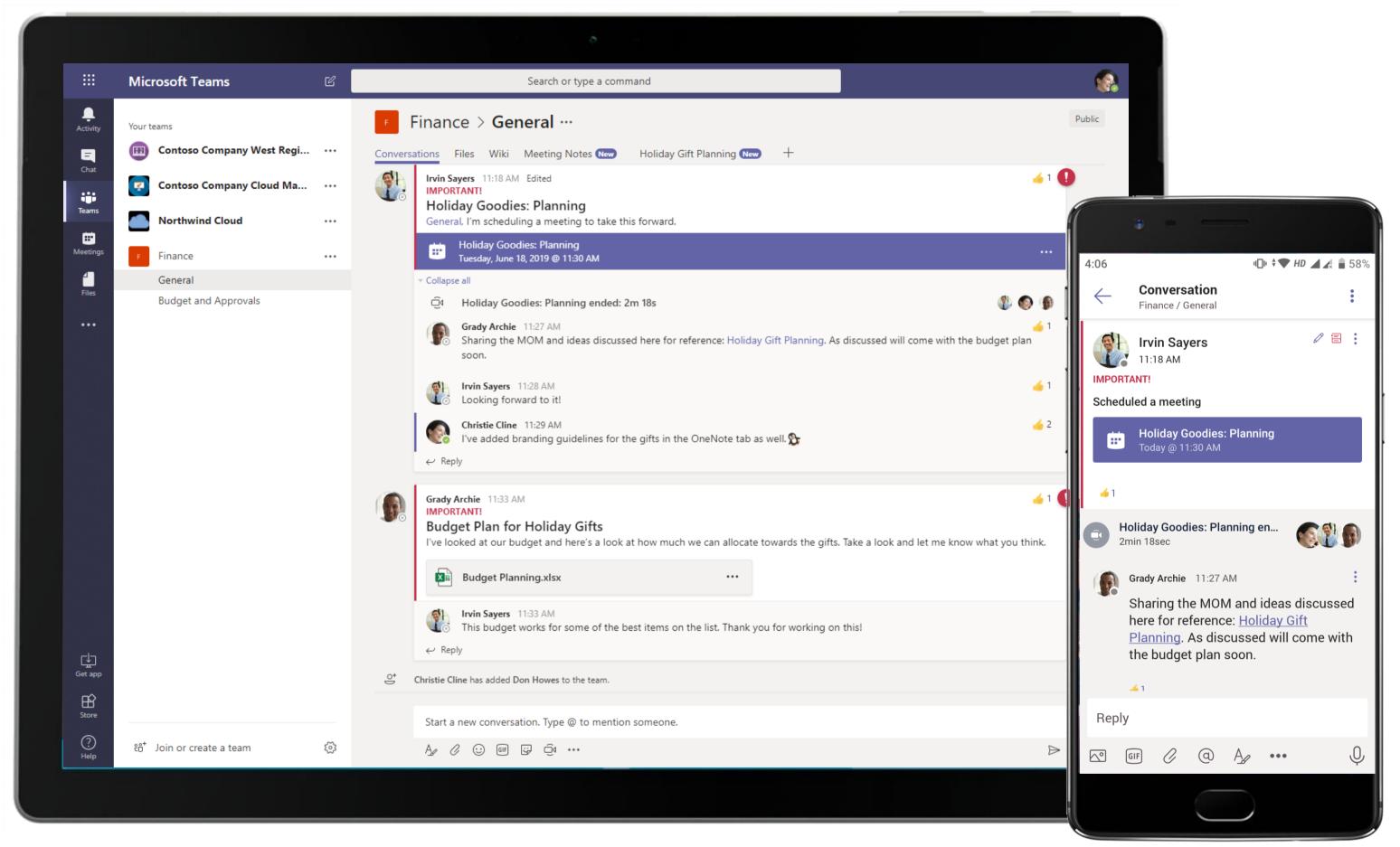
Which app integrations on Teams made it possible?





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.

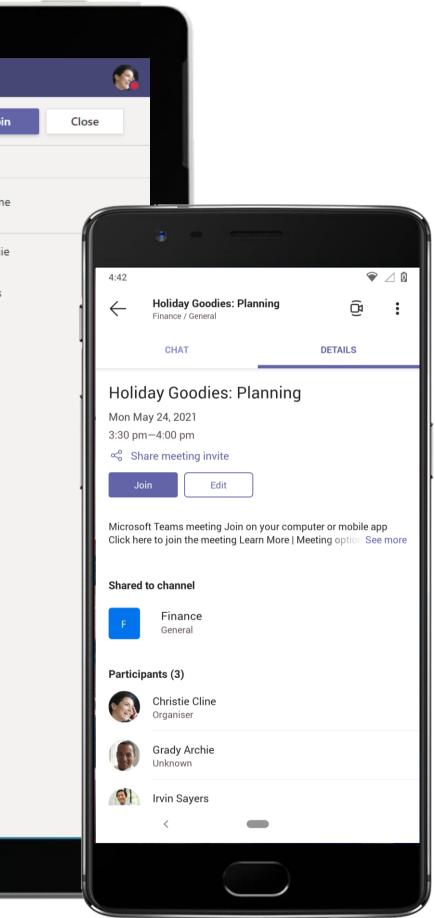


Finance & Accounts - Planning Budget for Holiday Giveaways

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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.

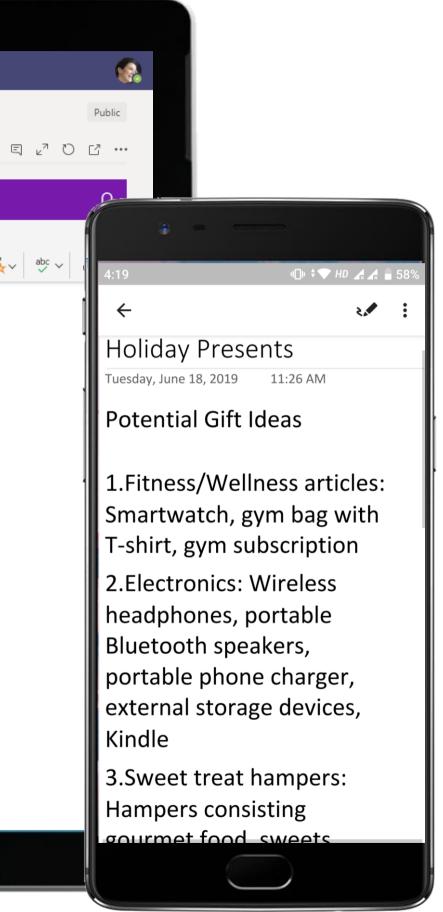


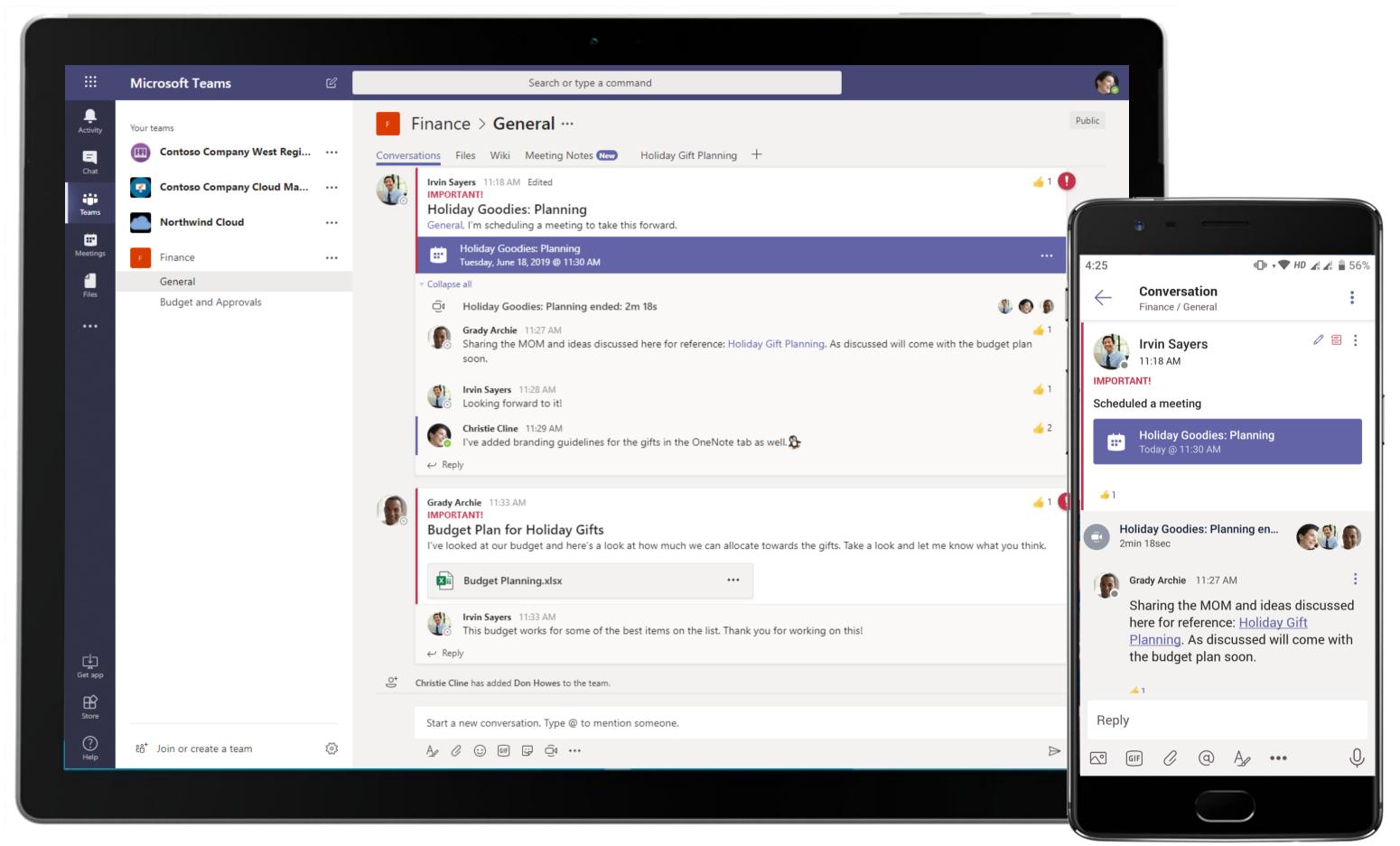


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Get app			 Potential Gift Ideas 1.Fitness/Wellness articles: Smartwatch, gym bag with T-shirt, gym subscription 2.Electronics: Wireless headphones, portable Bluetooth speakers, portable phone charger, external storage devices, Kindle 3.Sweet treat hampers: Hampers consisting gourmet food, sweets, chocolates, or dry fruits 4.Accessories: Custom stainless steel water bottles and laptop bags Branding guidelines for gifts: 1. No personalizing gifts
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	ະວ ⁺ Join or create a team	3	stays on cases and covers

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.







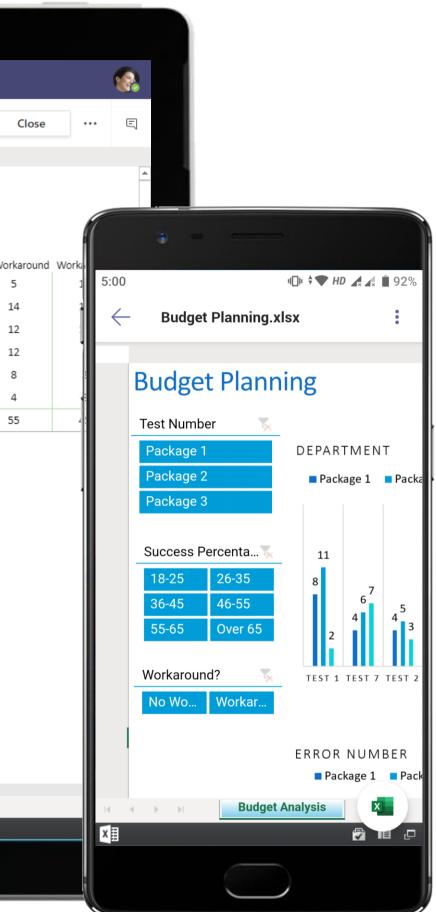
The Finance Manager along with Financial Analyst employs Excel's analytical abilities within Teams to build the budget plan and share it with the HR Manager as requested.



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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?

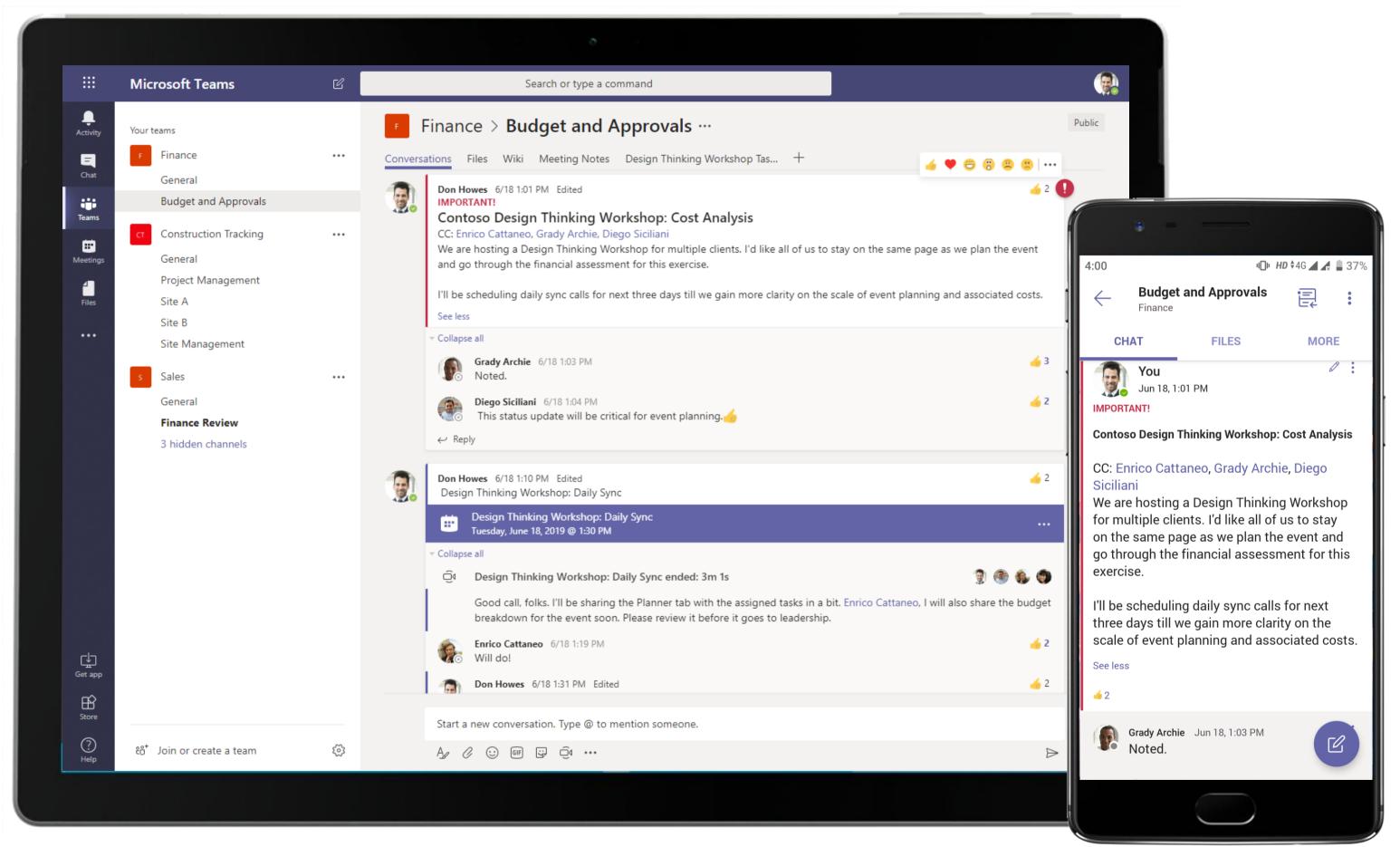
- Look up detailed info about different businesses, restaurants, venues, and more with Places.
- Integrating Workstreams.ai helps assign, track and communicate tasks and milestones without having to switch apps.
- Using Excel allows team members to have shared access to the budget information for review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



e channel for peer review. elebrate a job well done!

> Which app integrations on Teams made it possible?





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.

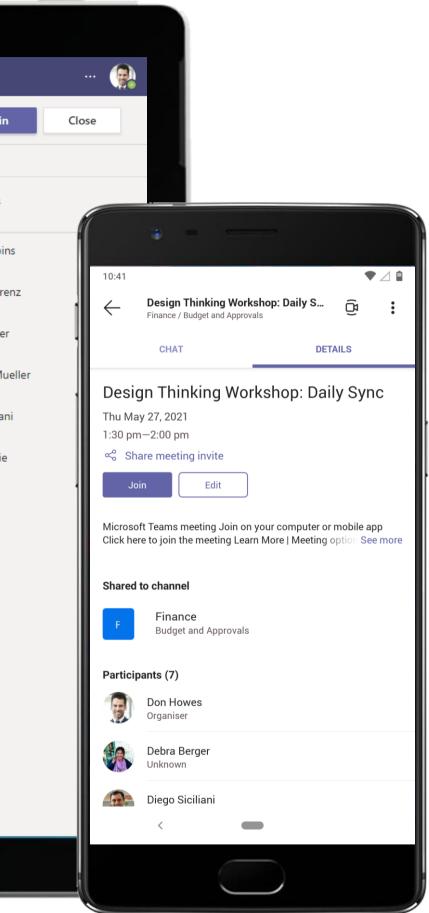


Finance & Accounts - Budget Approval

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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.

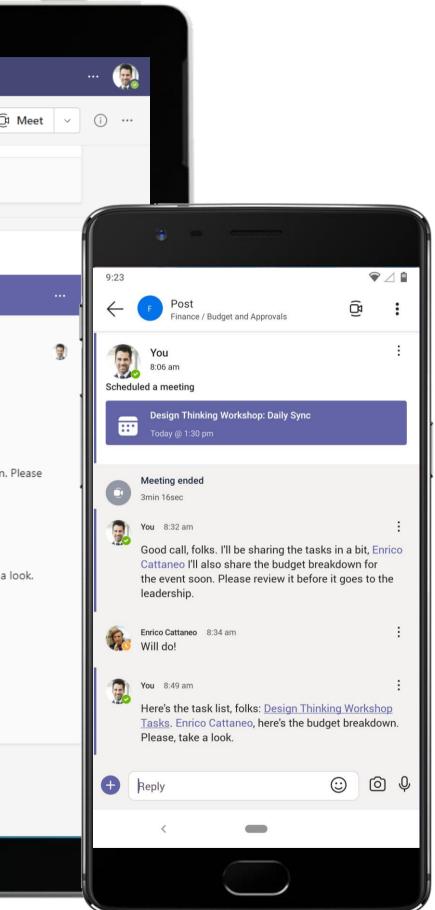




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tii) Teams	General		Today	
	Budget and Approvals	9	Don Howes 8:06 AM Scheduled a meeting	
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	Project Management NO New Operations (LA and Austin)		Attendance report Click here to download attendance report	
	General			
	Marketing Operations		Don Howes 8:32 AM Good call, folks. I'll be sharing the tasks in a bit, Enrico Cattaneo I'll also share the budget breakdown for the event so review it before it goes to the leadership.	oon
	Hidden teams		Enrico Cattaneo 8:34 AM Will do!	
			Don Howes 8:49 AM Here's the task list, folks: Design Thinking Workshop Tasks. Enrico Cattaneo, here's the budget breakdown. Please, tak	ke a
			Budget Breakdown.xlsx Finance > Budget and Approvals	
			Enrico Cattaneo 8:52 AM @Don Howes Could you please check the numbers for the 16th again? Conflicts with the figures I've got.	
Ê			Don Howes 8:53 AM Checked and updated thanks for catching that.	
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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.



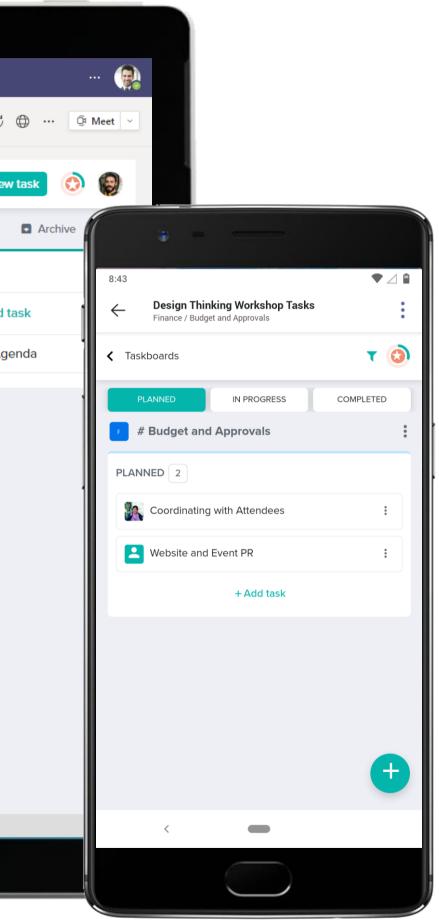


Finance & Accounts - Budget Approval

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



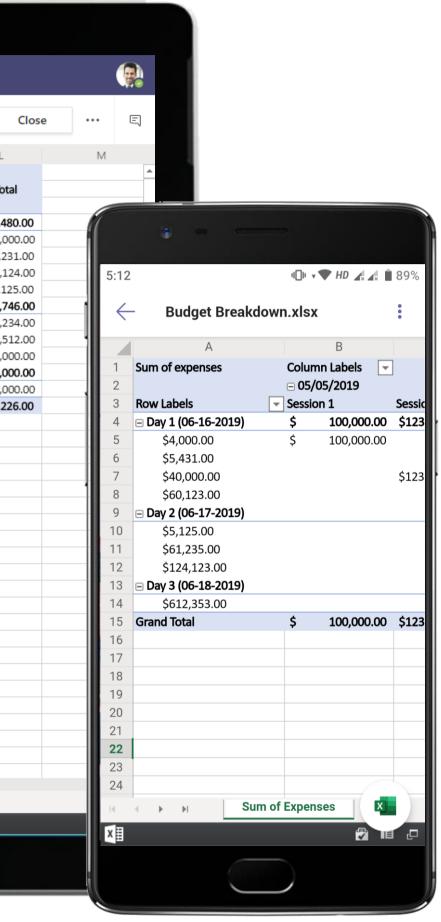


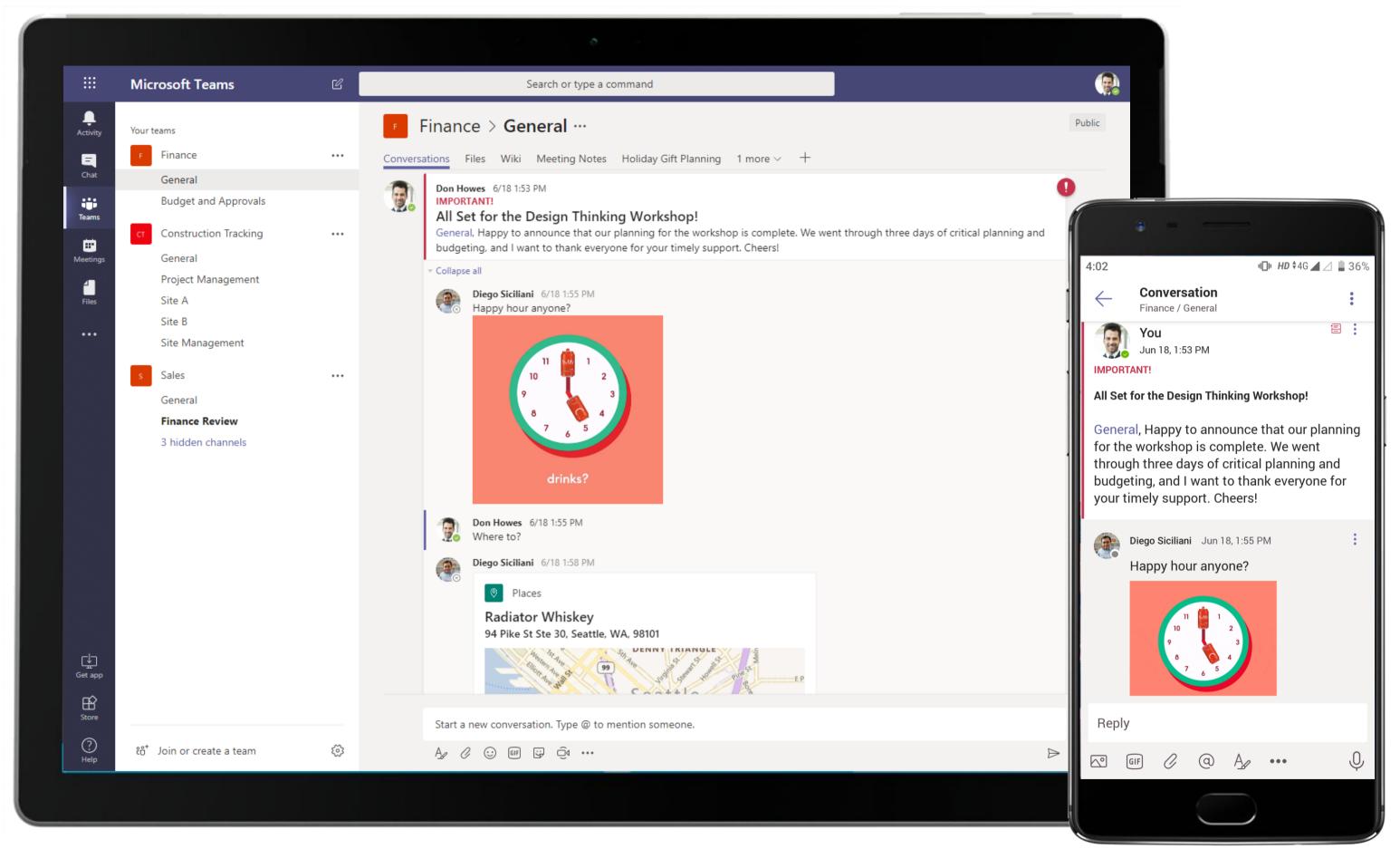
Finance & Accounts - Budget Approval

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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.

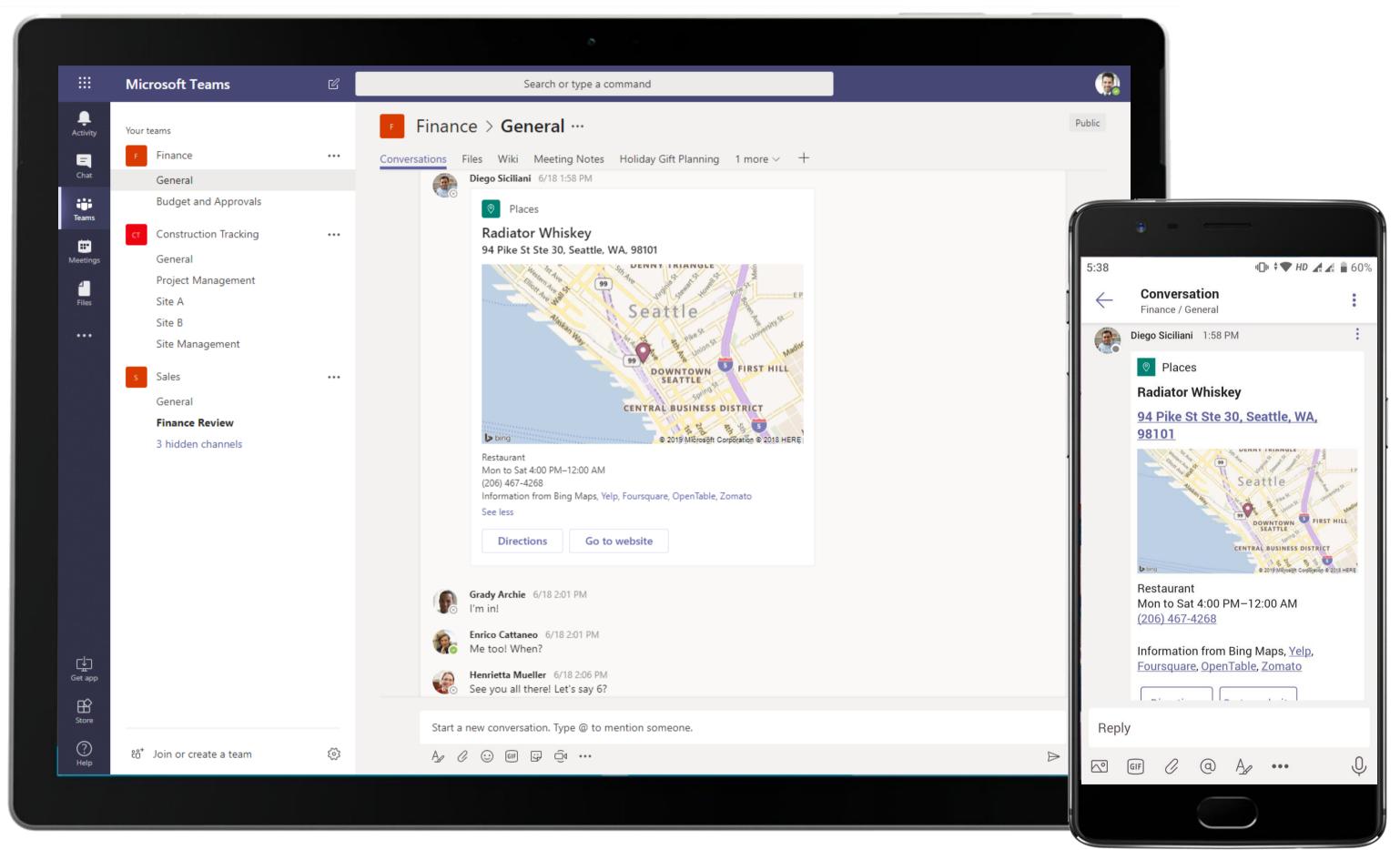






The Finance Manager uses channel communication to inform his team when the budget planning for the workshop is complete. Intense in moments of work flurry, these channels also see a fair amount of levity with GIFs and emojis that makes working together fun!





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.



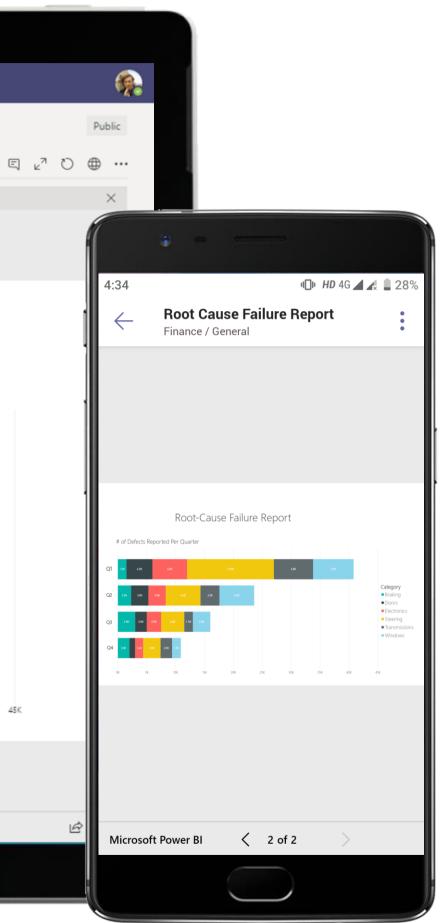
Which app integrations on Teams made it possible?



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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.

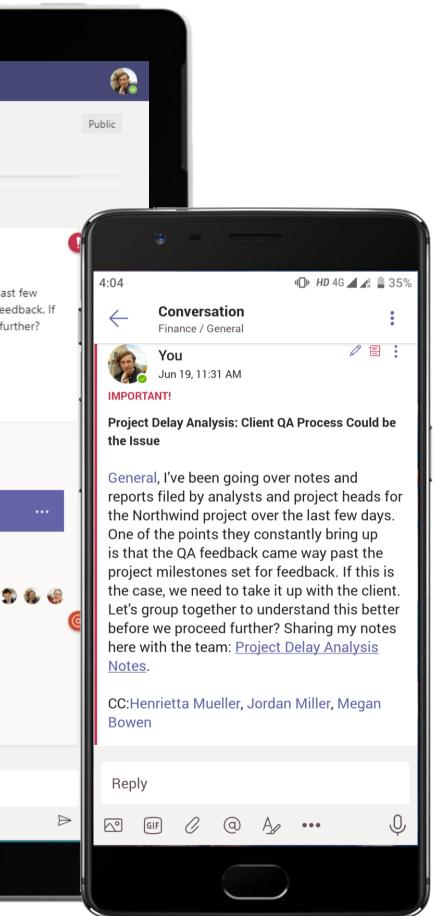




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Teams	Budget and Approvals		O ⁺ Henrietta Mueller has added Megan Bowen and Jordan Miller to the team.
Meetings Files	 Contoso Company West Region General Community HR Announcements Leadership Review New Hire 		 Enrico Cattaneo 6/19 11:31 AM Edited IMPORTANT! Project Delay Analysis: Client QA Process Could be the Issue General, I've been going over notes and reports filed by analysts and project heads for the Northwind project over the last days. One of the points they constantly bring up is that the QA feedback came way past the project milestones set for feet this is the case, we need to take it up with the client. Let's group together to understand this better before we proceed for Sharing my notes here with the team: Project Delay Analysis Notes. CC:Henrietta Mueller, Jordan Miller, Megan Bowen
	Summer Interns	0	See less
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	Employee Engagement		I think it's best if we meet and talk about this. Scheduling a meeting at all our earliest availability.
	Employee Referrals		Project Delay: Client Report
	Employment Trend	! 0	Wednesday, June 19, 2019 @ 12:00 PM
	Planning	0	Jordan Miller 6/19 11:37 AM
	1 hidden channel		I agree, let's talk soon.
	NO New Operations (LA and Austin)		⊇ Project Delay: Client Report ended: 1m 45s
	General		Henrietta Mueller 6/19 11:41 AM Thanks for bringing this up, Enrico Cattaneo. I'll be in touch with the client shortly.
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Microsoft Teams conversations are threaded so users can reply directly in-context to specific conversations, while keeping relevant discussions and files grouped together.



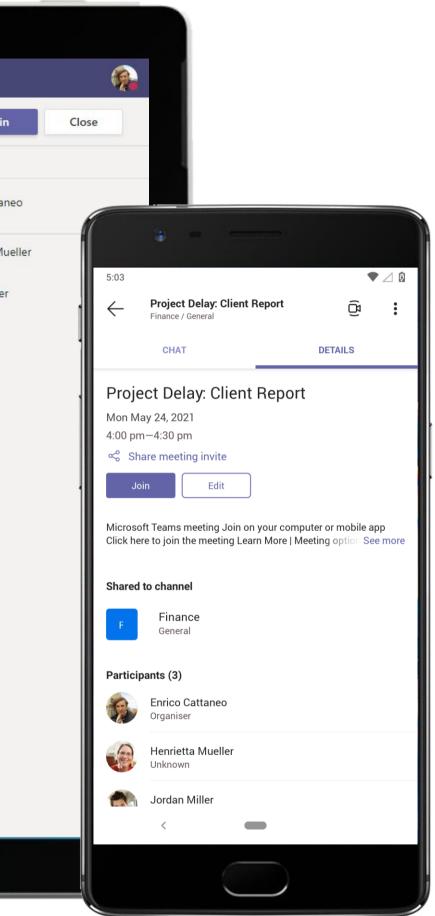


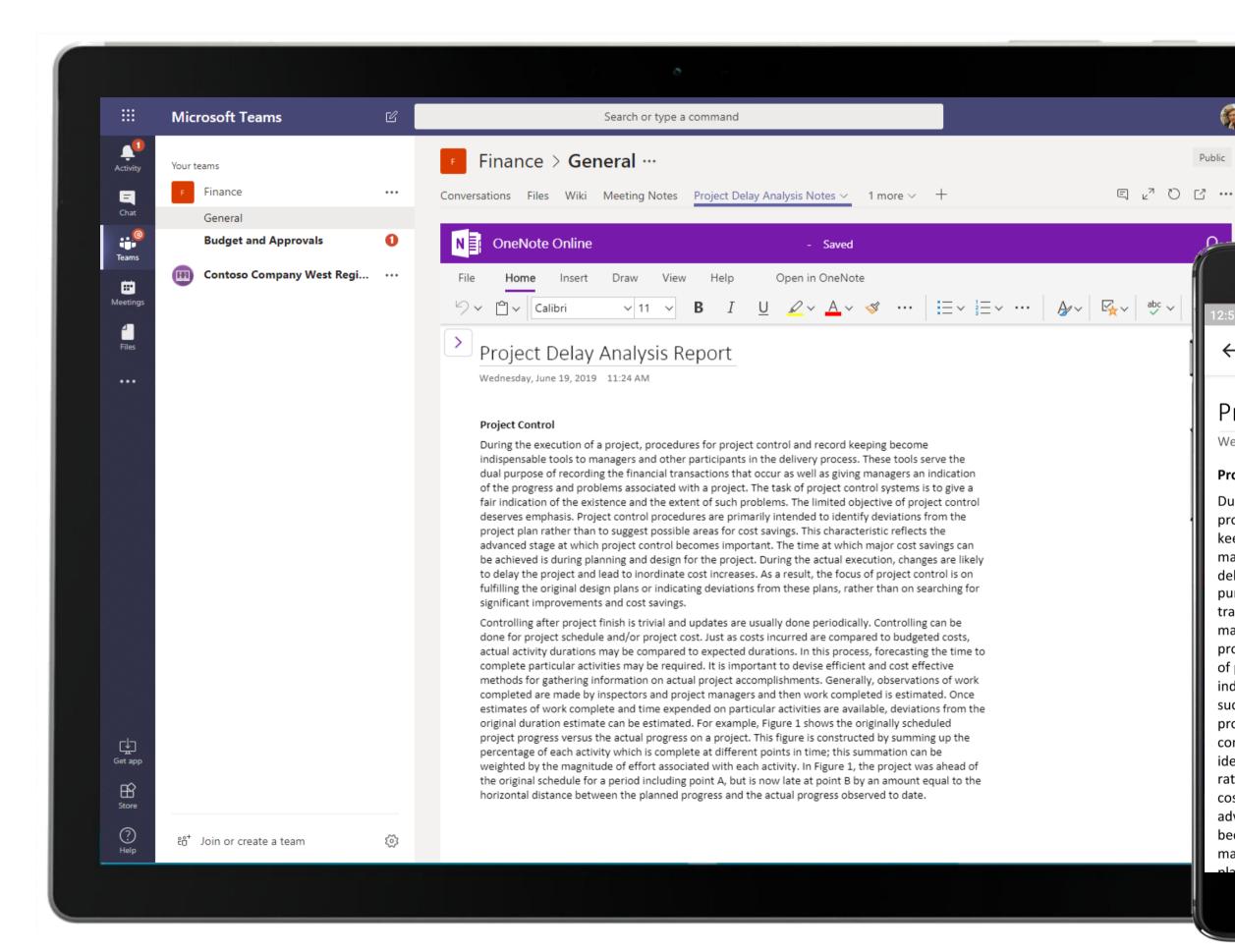
Finance & Accounts - Reliability and Serviceability

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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.



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Project Delay Analysis Repo

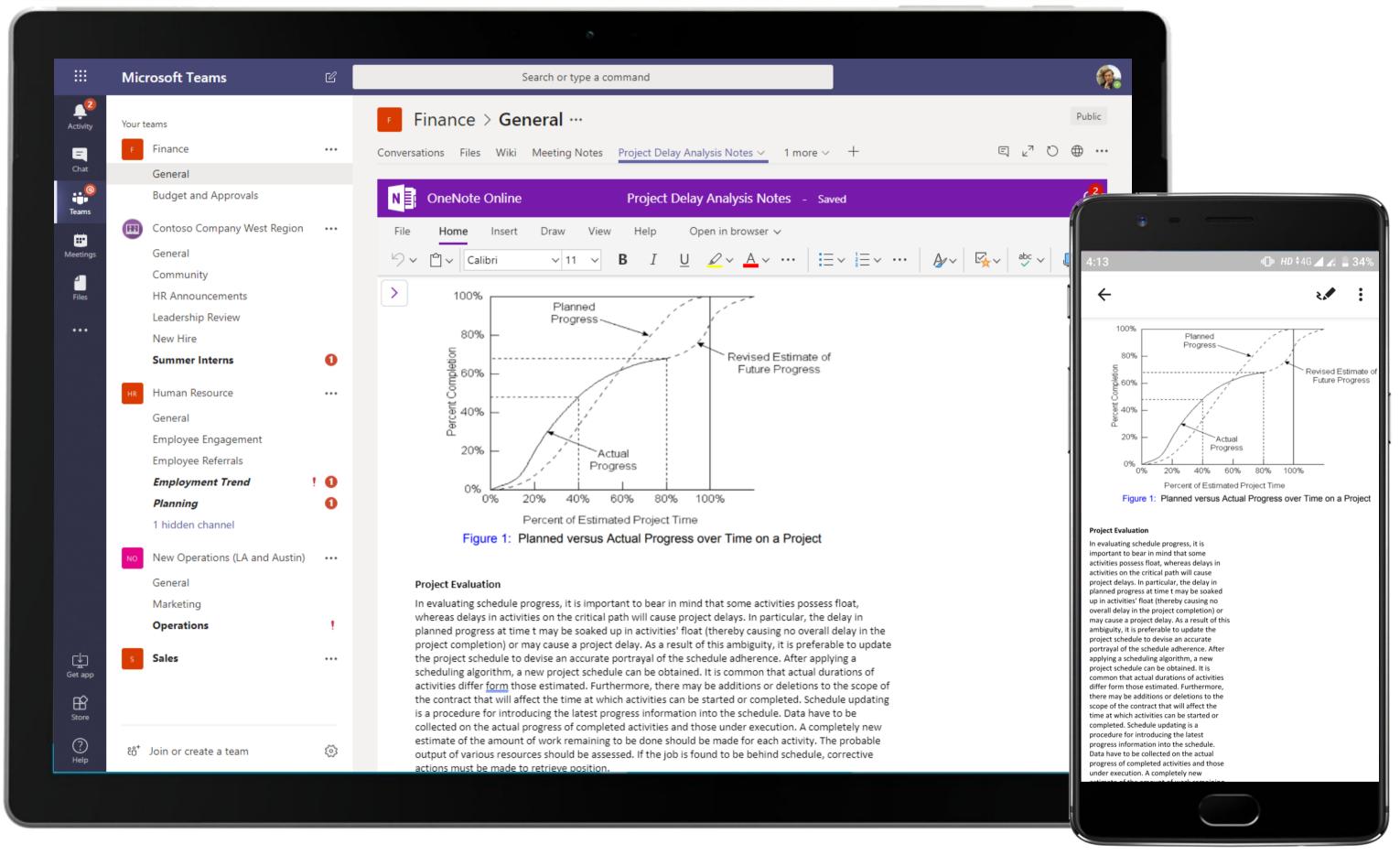
Wednesday, June 19, 2019 11:24 AM

Project Control

Public

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During the execution of a project, procedures for project control and record keeping become indispensable tools to managers and other participants in the delivery process. These tools serve the dual purpose of recording the financial transactions that occur as well as giving managers an indication of the progress and problems associated with a project. The task of project control systems is to give a fair indication of the existence and the extent of such problems. The limited objective of project control deserves emphasis. Project control procedures are primarily intended to identify deviations from the project plan rather than to suggest possible areas for cost savings. This characteristic reflects the advanced stage at which project control becomes important. The time at which major cost savings can be achieved is during



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.

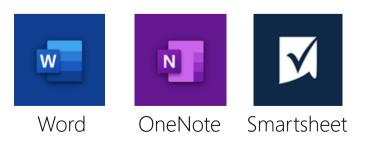
- Presents the Statement of Work (SOW) to notify team members about completion rates as per agreed timelines. •
- Analyses a milestone report tab that contains photos of completion, invoices of purchases made and accumulated • workforce hours by trade and more.
- Creates a Smartsheet tab for each site 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.

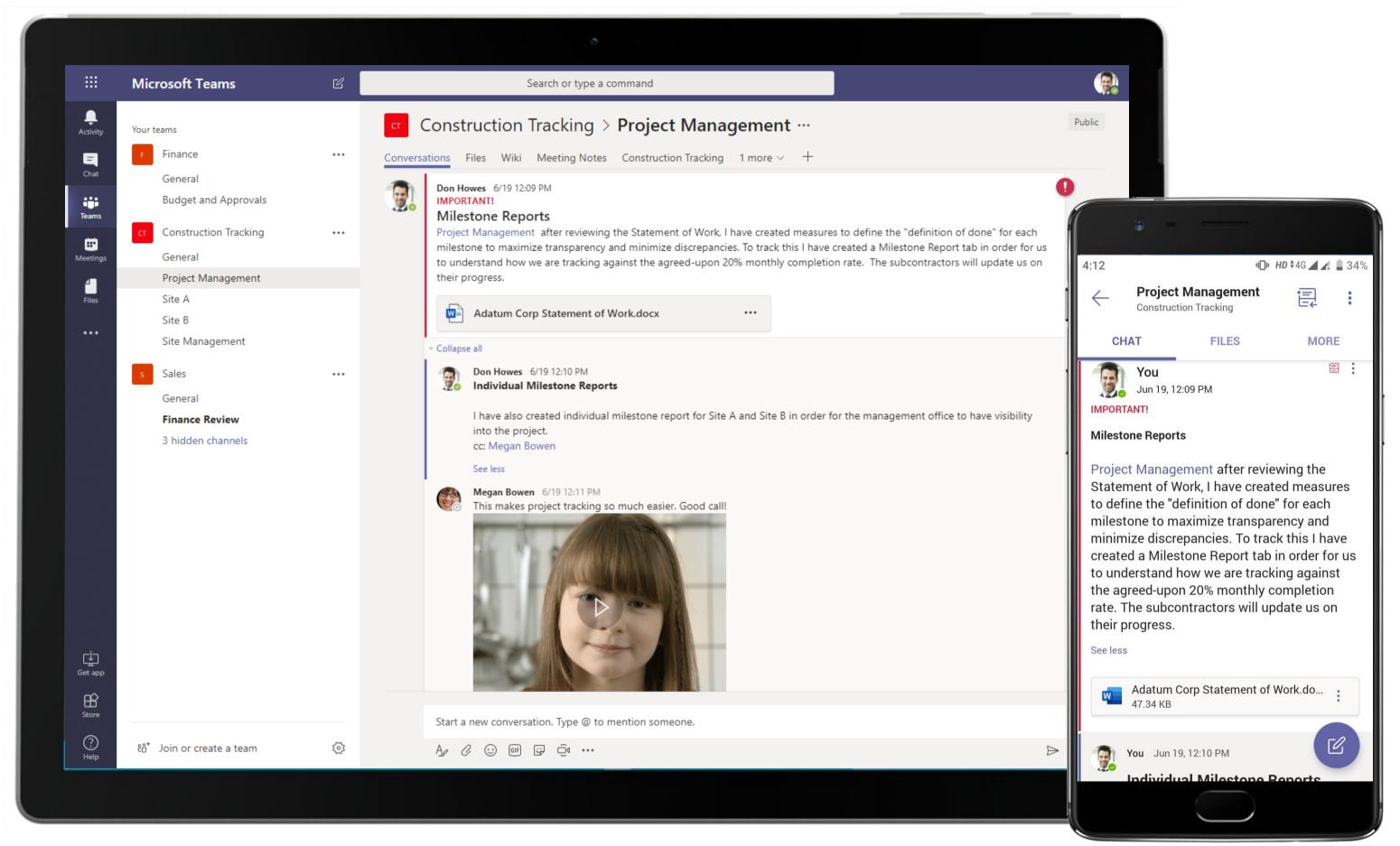
How did Teams help the Finance Manager execute his roles and responsibilities?

- 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?





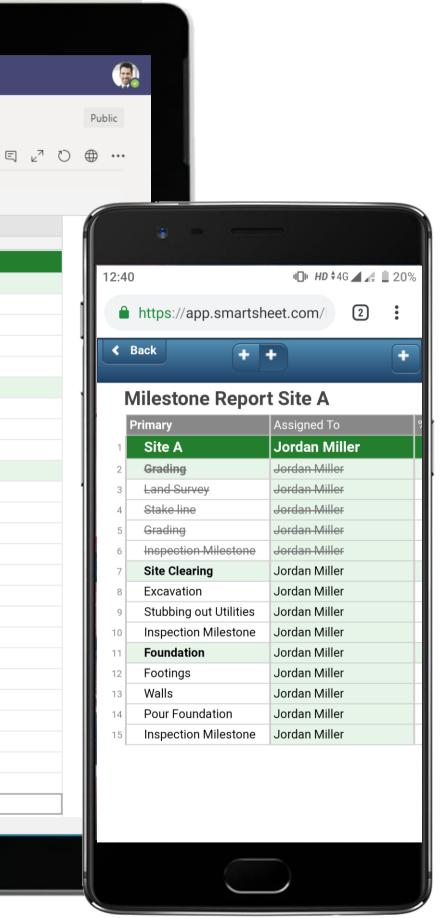
Milestone tracking for plant construction becomes easy with the powerful tools within Teams. Add to that it's diverse communication platform and the Finance Manager can execute project management tasks from within a single workspace.

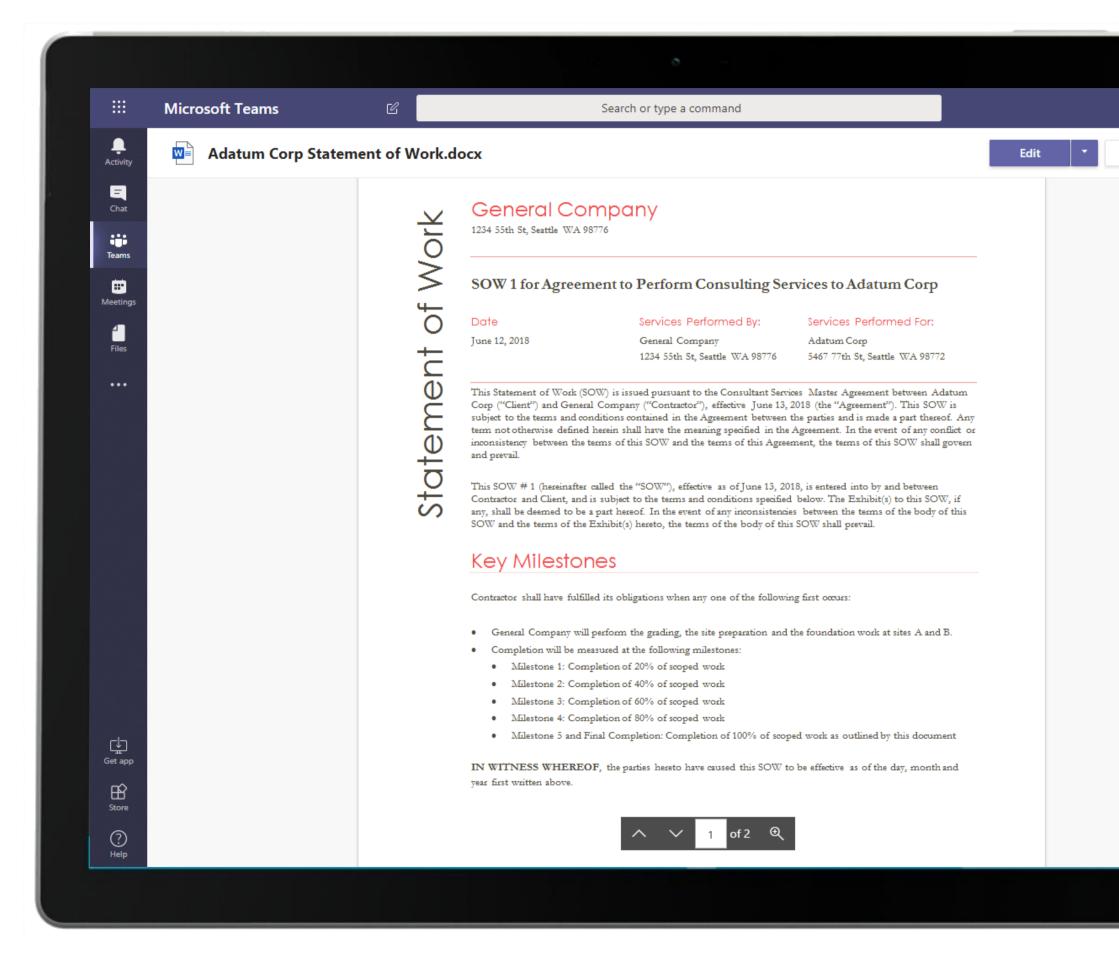


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		s Sales	•••	8		Excavation	Jordan Miller	10%	
		General		9		Stubbing out Utilities	Jordan Miller	10%	
		Finance Review		10		Inspection Milestone	Jordan Miller	0%	
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				12		Footings	Jordan Miller	0%	
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Create, track, and assign tasks and milestones with Smartsheet. The Finance Manager sets up simple and hassle-free milestone report with Smartsheet.

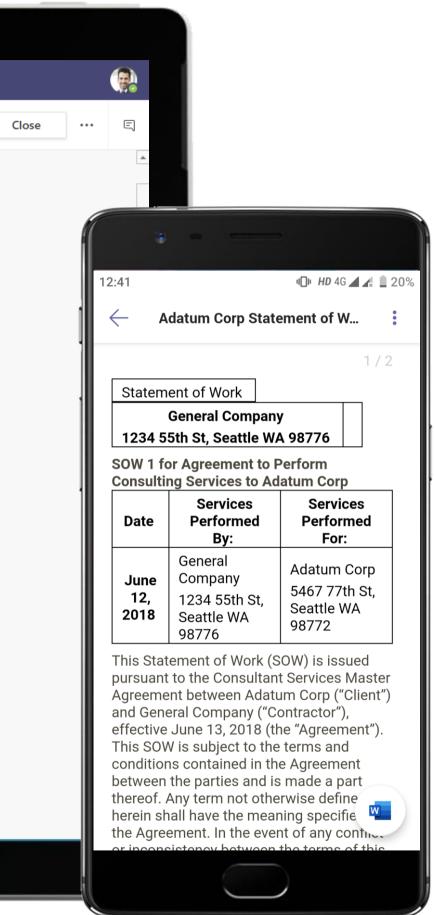


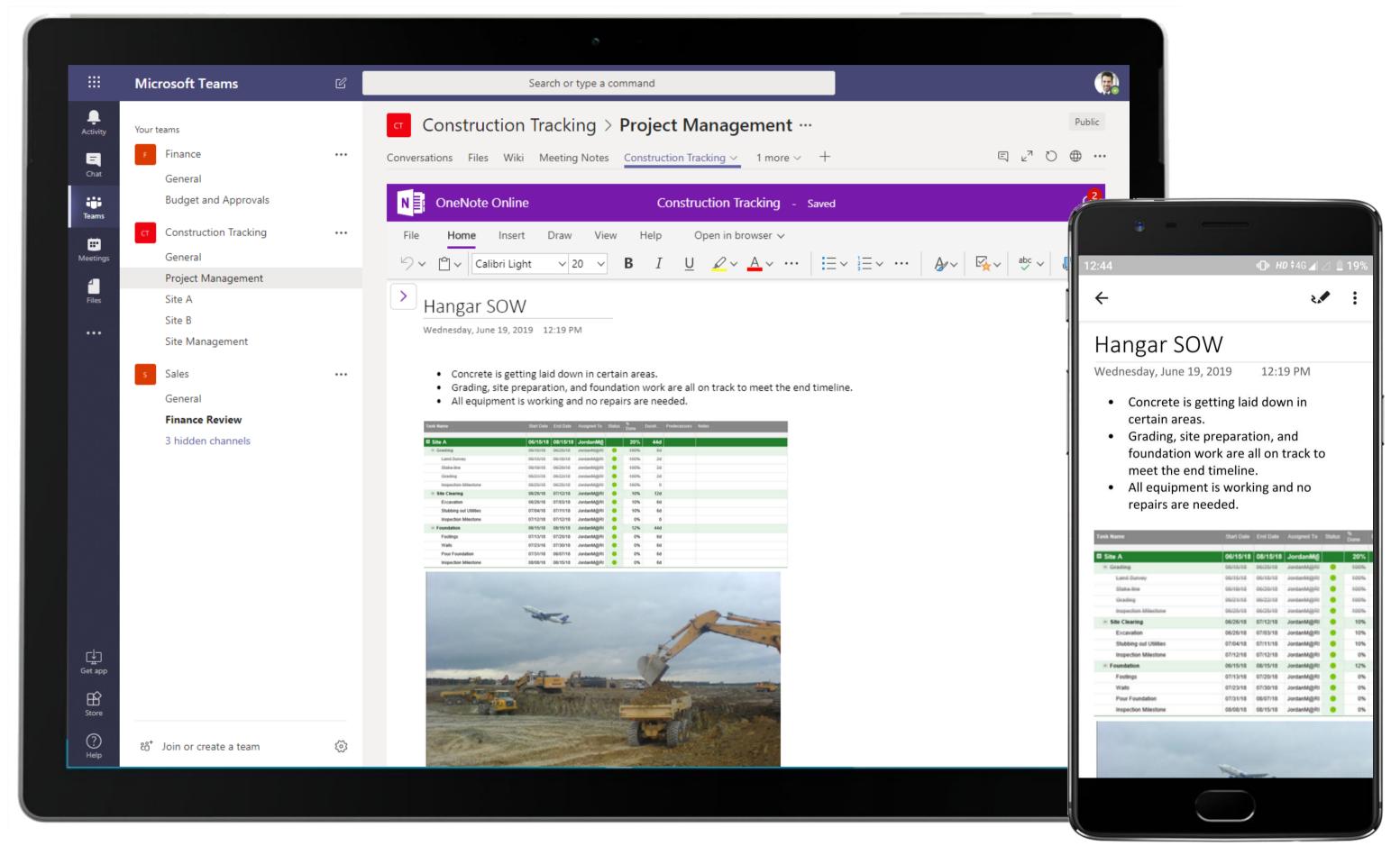




Enjoy document collaboration, creation and editing with the full canvas and toolset of Word in Microsoft Teams. The Finance Manager is able to access shared documents hosted securely in the Files tab.

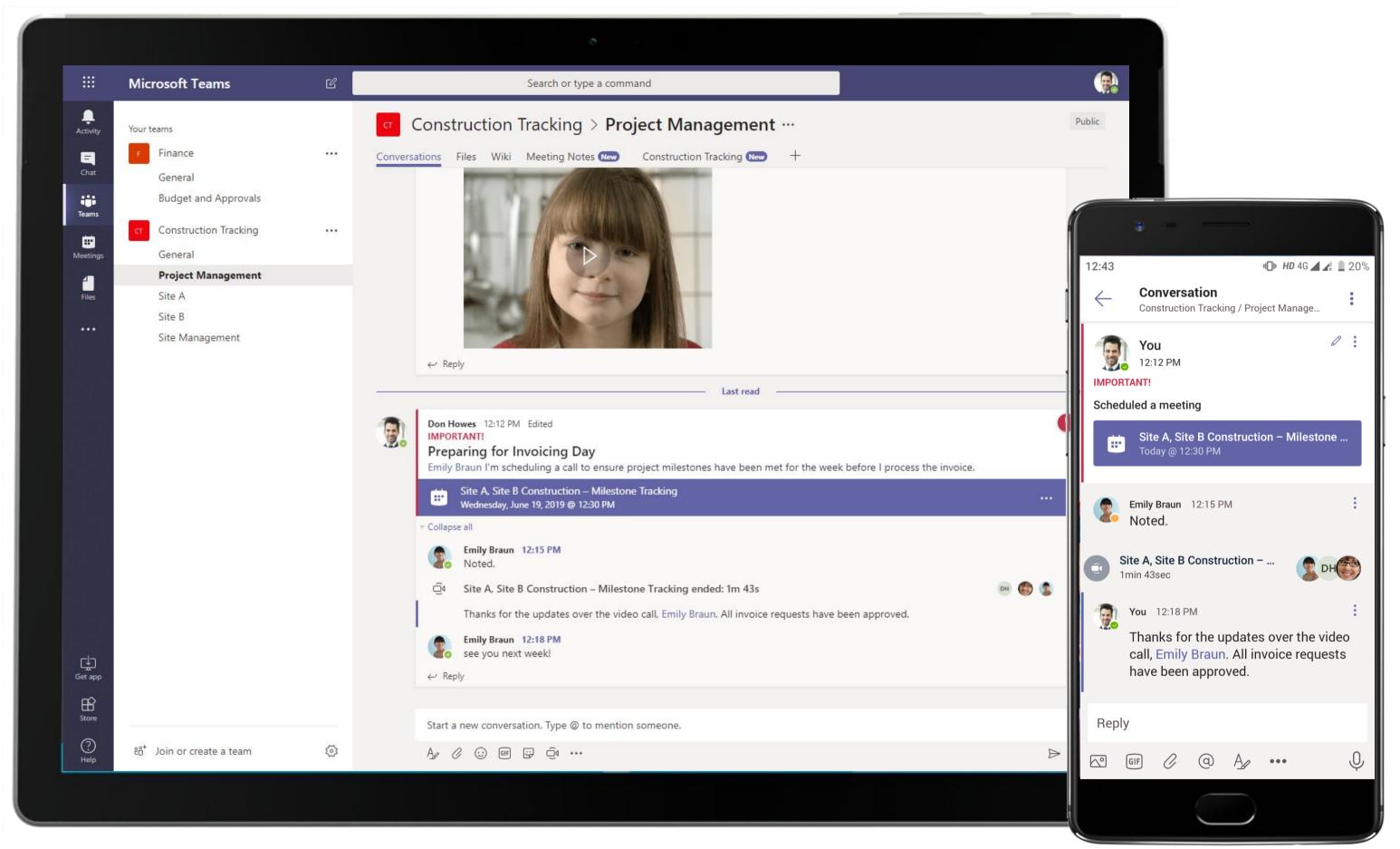






Add a OneNote tab to your channel in Microsoft Teams and use it as a shared space for notes among team members. The Manager uses it to create and save notes and upload photographs while tracking project milestones.





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.

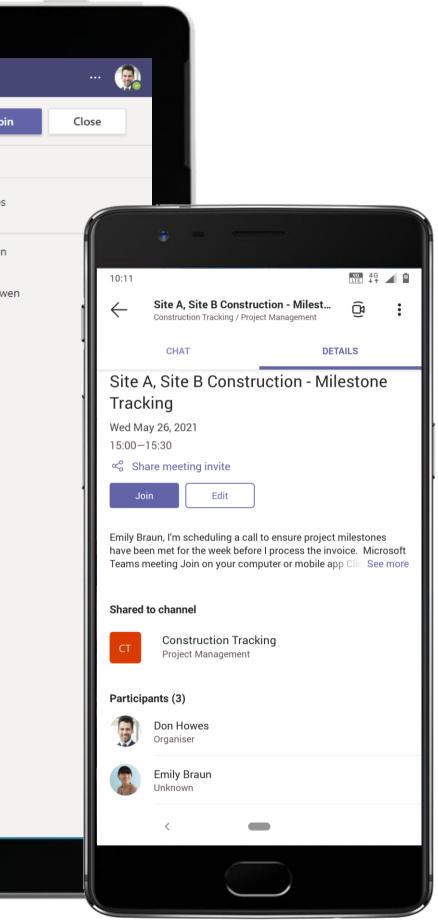


Finance & Accounts - Tracking Milestones for Invoicing and Payments

	Microsoft Teams Q Search	
	Site A, Site B Construction - Milestone Tracking Chat Details Scheduling Assistant	Jc
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	Construction Tracking > Project Management	
	Add location	
	■ I U S V A A Paragraph × AB E E I I 99 G E I V C Emily Braun, I'm scheduling a call to ensure project milestones have been met for the week before I process the invoice. Microsoft Teams meeting Join on your computer or mobile app Click here to join the meeting Learn More Meeting options	
Apps		
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$\overline{1}$		

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

