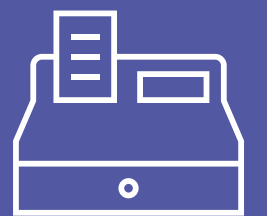




Microsoft Teams for Sales

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.

Sell Efficiently

- Be Productive on the Road
- Simplify Tasks and Focus on Selling
- Create Customized Sales Presentations Faster
- Engage with Your Customers More Easily
- Create High-Quality Sales Reports
- Preparing for Monthly Review



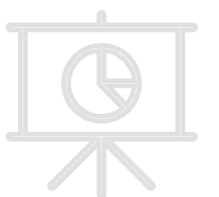
Work Together

- Collaborate To Close Deals Faster
- Prepare RFPs More Easily as a Team
- Collaborating with Finance and Marketing Teams
- Empowering Frontline Sales Managers



Use Insights

- Streamline Sales Activities to Beat Revenue Targets
- Visualize Trends Impacting Sales Forecasts
- Forecasting Sales and Analyzing Gaps
- Bridge the Gap Between Sales and Marketing
- Tap Into the Knowledge Within Your Company





Sell Efficiently

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

Sales Superpowers in Teams

Capabilities and features used...

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

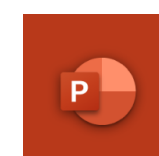
Apps that enable an immersive experience in Teams



Word



Excel



PowerPoint



Communities



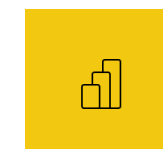
Bing News



Shifts



Ment.io



Power BI



Salesforce



Zoho CRM



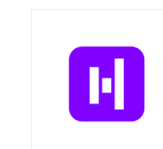
Calendar BOT



Disco



CT- CRM and ERP Chatbot



HitHorizons



Decisions



Zoho Desk



Tasks by Planner and To Do



Smartsheet

Meet the Business Decision Makers

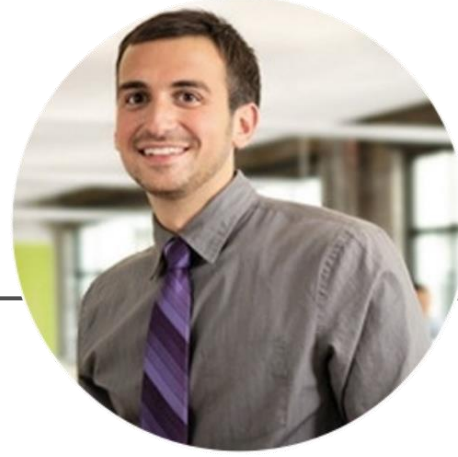
Sales



Sales Manager

"As sales leaders, we have to set the bar high for ourselves as well as our teams."

- Recruit and train new sales staff, assign specific tasks to other sales staff, and monitor the team's sales performance
- Solve customer complaints and answer customers' questions
- Provide sales staff with constructive feedback



Sales Specialist

"You don't close a sale; you open a relationship if you want to build a long-term, successful enterprise."

- Provide product demonstrations to staff and clients, and taking the lead in resolving complaints
- Conduct market research and sharing findings with the team
- Work alongside the team to draw up strategies to increase customer base



Sales Analyst

"Not everything that can be counted counts, and not everything that counts can be counted."

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

Meet the Business Decision Makers

Sales



Sales Associate

"What makes you weird, makes you unique and therefore makes you stand out."

- Build in-depth knowledge of the product and keep up with product and/or feature updates
- Improve customer engagement and providing outstanding customer service.
- Introduce promotions and opportunities to customers



Account Executive

"How you sell matters. But how your audience feels when they engage with you matters more."

- Take responsibility for keeping current clients satisfied and deliver exceptional client service.
- Work with the Sales team to onboard new clients and maintain existing client relationships.
- Forecast and track key account metrics.



Be Productive on the Road

Sales Associate

Scenario Walkthrough

Being on the road is a big part of the job, but the Sales Associate cannot afford to waste time in transit. The Sales Associate clocks-in to work, communicates with his peers and reviews the sales pitch remotely before meeting with the client. Right after the meeting, he notifies the team of the successful outcome and communicates with team members remotely without wasting valuable time. See how the Sales Associate leverages Microsoft Teams to seamlessly accomplish multiple tasks.

- Views shift notes and clocks-in at the start of the day via Shifts.
- Checks the weather for the day and proceeds to look up location details for the client meeting via Places.
- Reaches out to the Finance Analyst to check whether the sales pitch is updated with the latest revenue projections via 1:1 chat.
- Notifies the team of the successful meeting and informs them of the agreement with Fabrikam via channel communications.
- Uses the RememberThis bot to remind him to discuss the meeting details during the next weekly sync.
- Clocks-out of work at the end of the day with Shifts.

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

- Prepare powerful presentations with rich visual content and crystal-clear infographics using PowerPoint.
- Set time-based reminders on important conversations using RememberThis.
- Personal 1:1 chat and channel conversations help reach out to team members anytime.

Which app integrations on Teams made it possible?



Shifts



PowerPoint



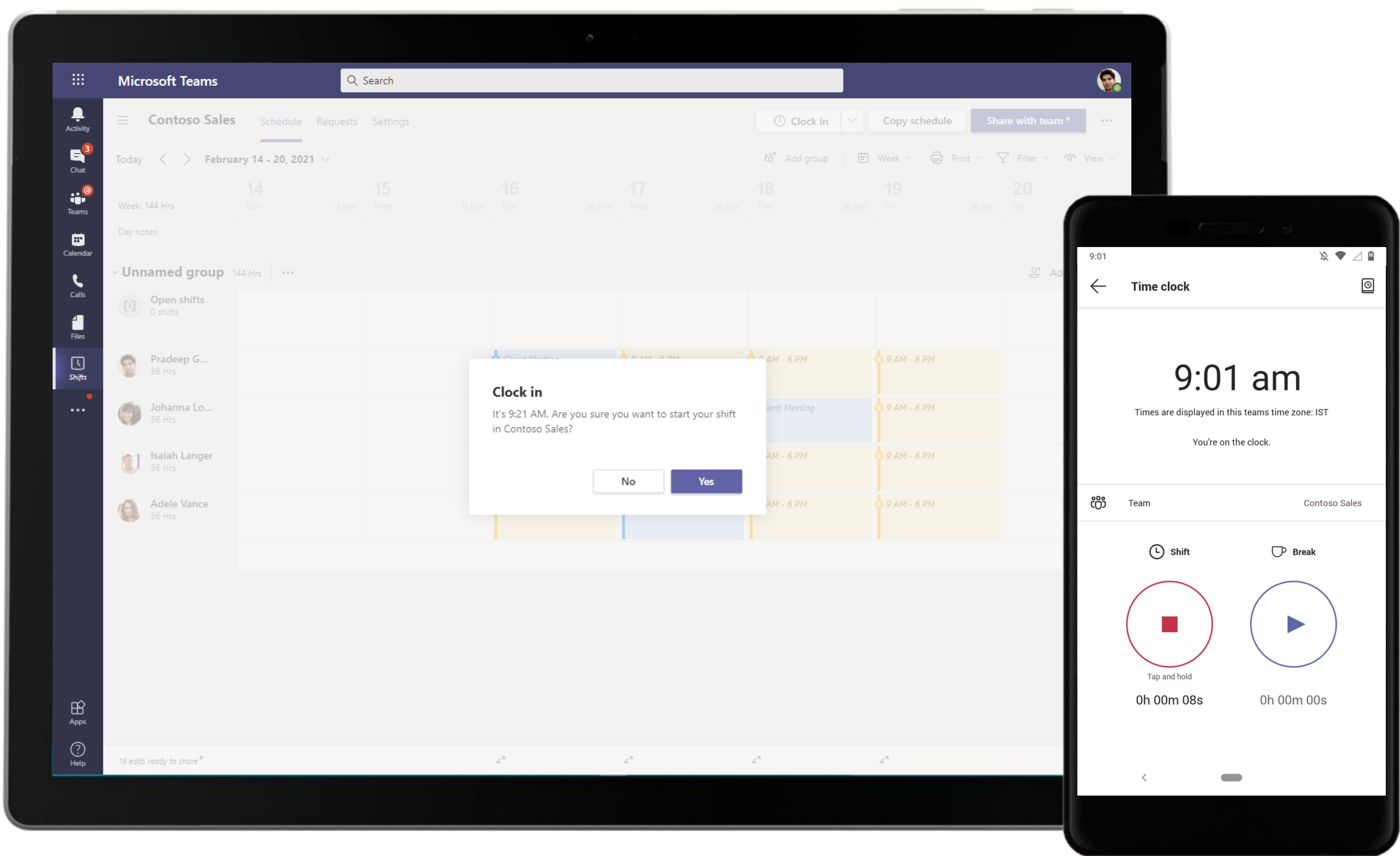
RememberThis



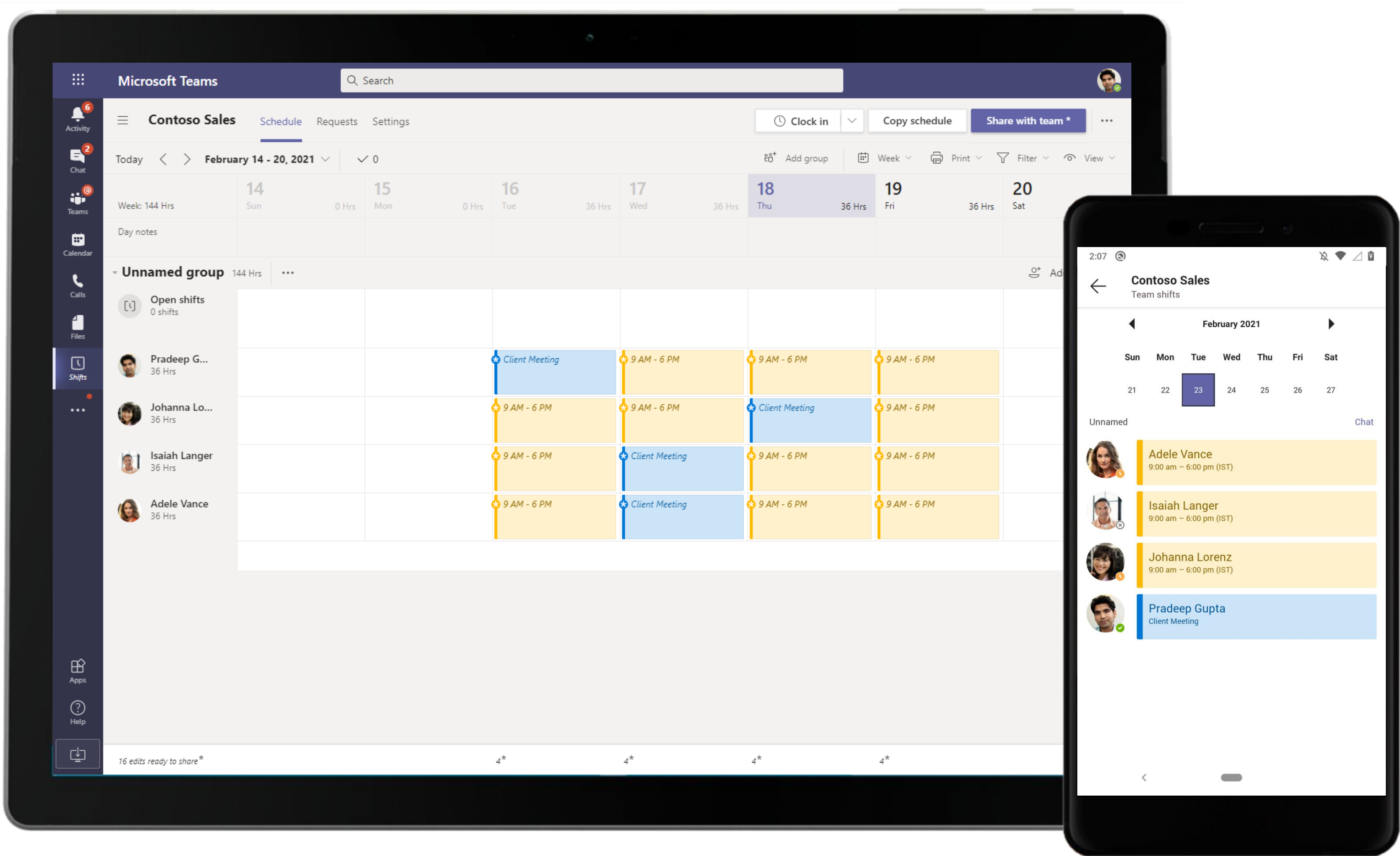
Weather



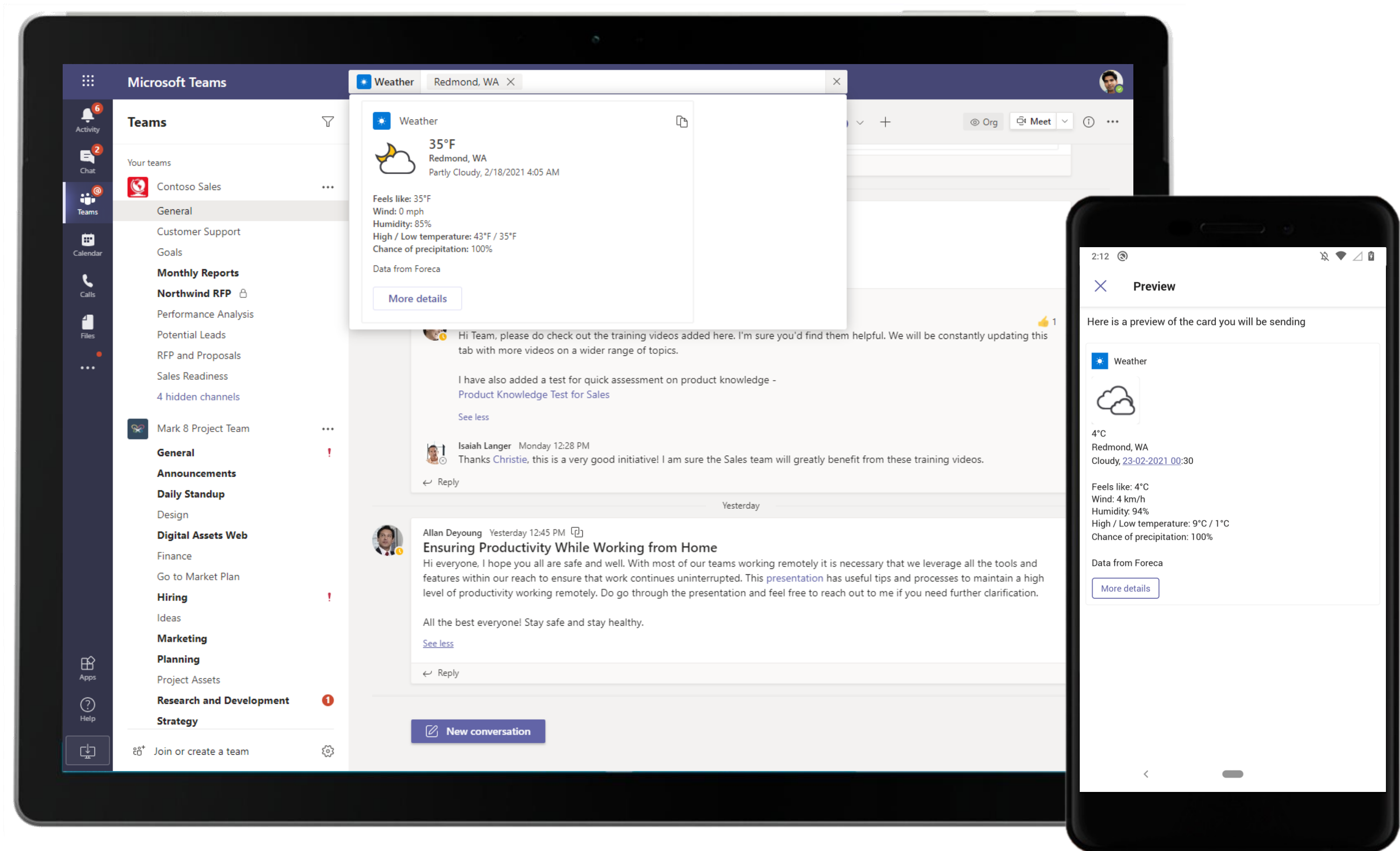
Places



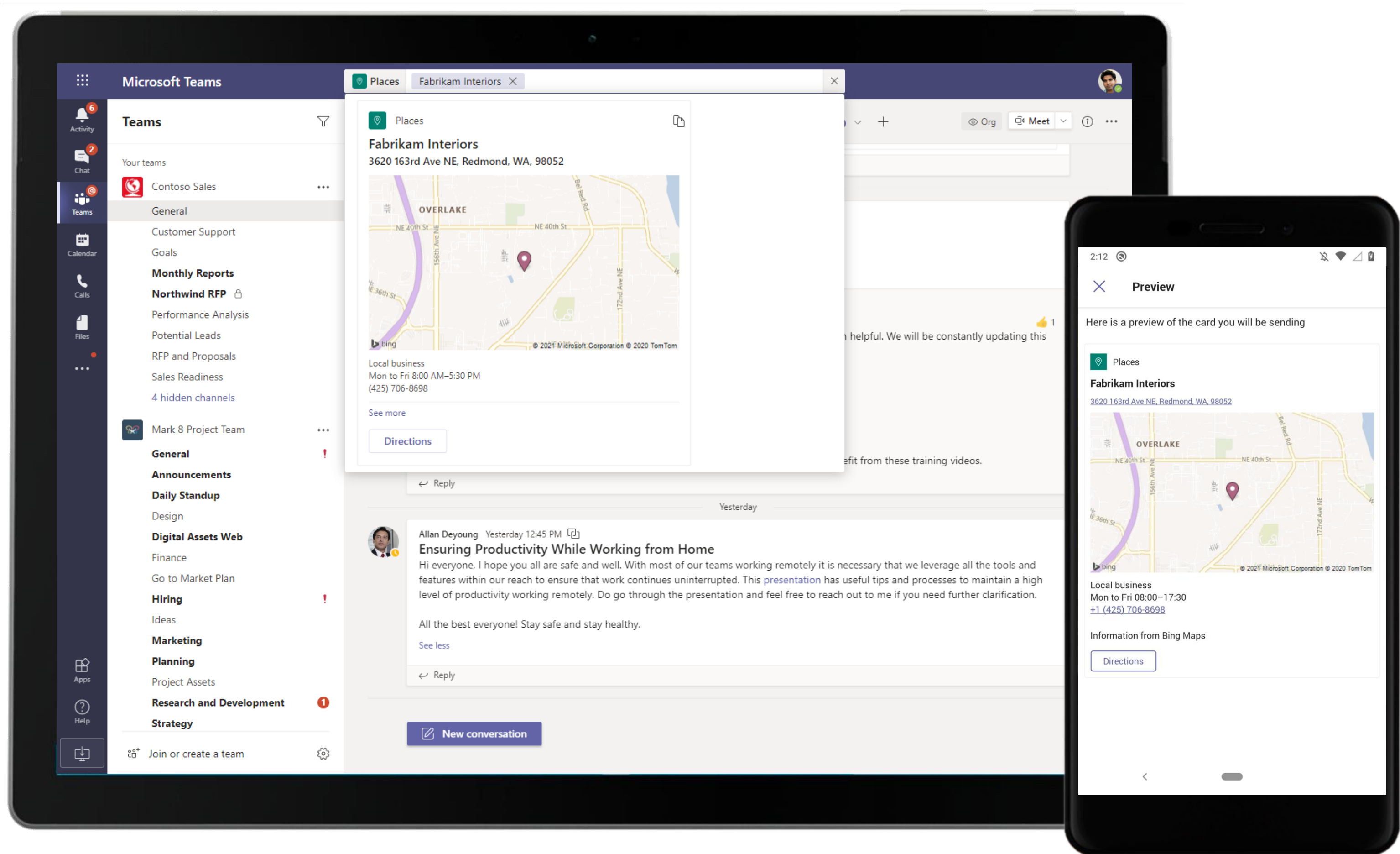
With the Time Clock in Shifts, your team can clock in and out of a shift from anywhere, even from a mobile device. The Sales Associate begins his day by clocking in using Shifts right inside Teams.



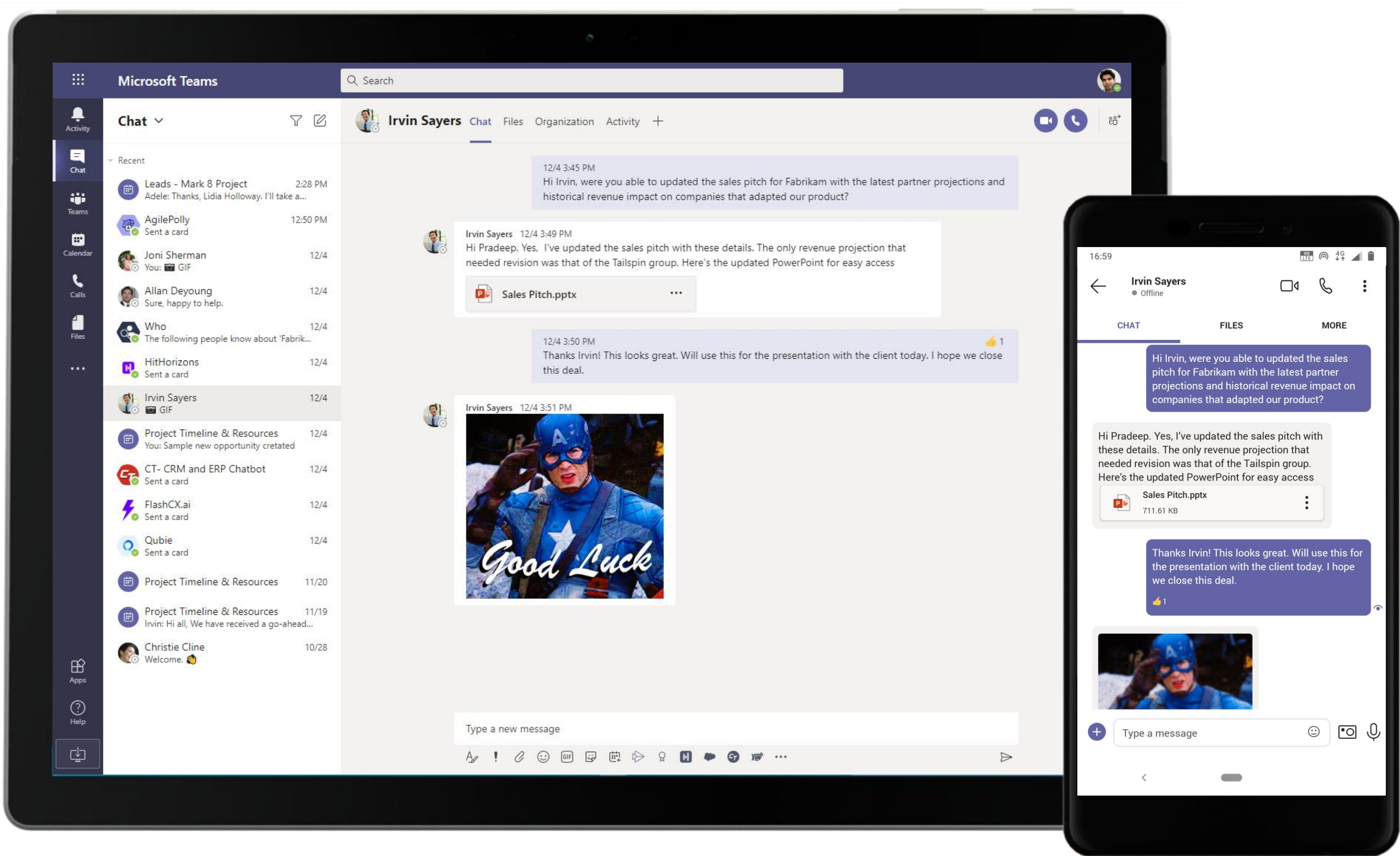
Keep track of all your upcoming shifts in a team schedule. The Sales Associate views his own and the team’s schedule in Shifts for Teams.



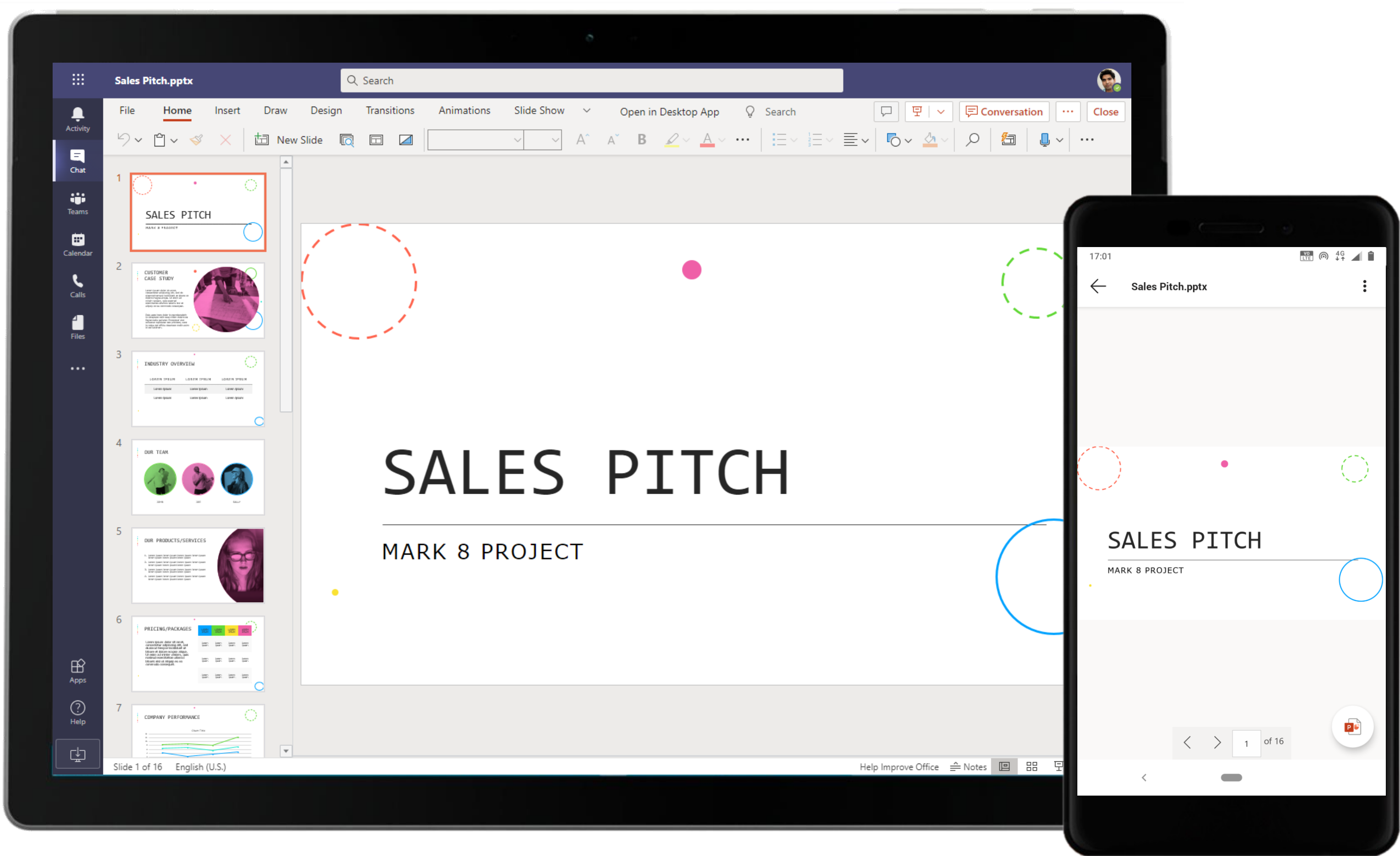
Find current weather reports for any city, zip code, or location with Weather app in Microsoft Teams. The Sales Associate views the weather for the city.



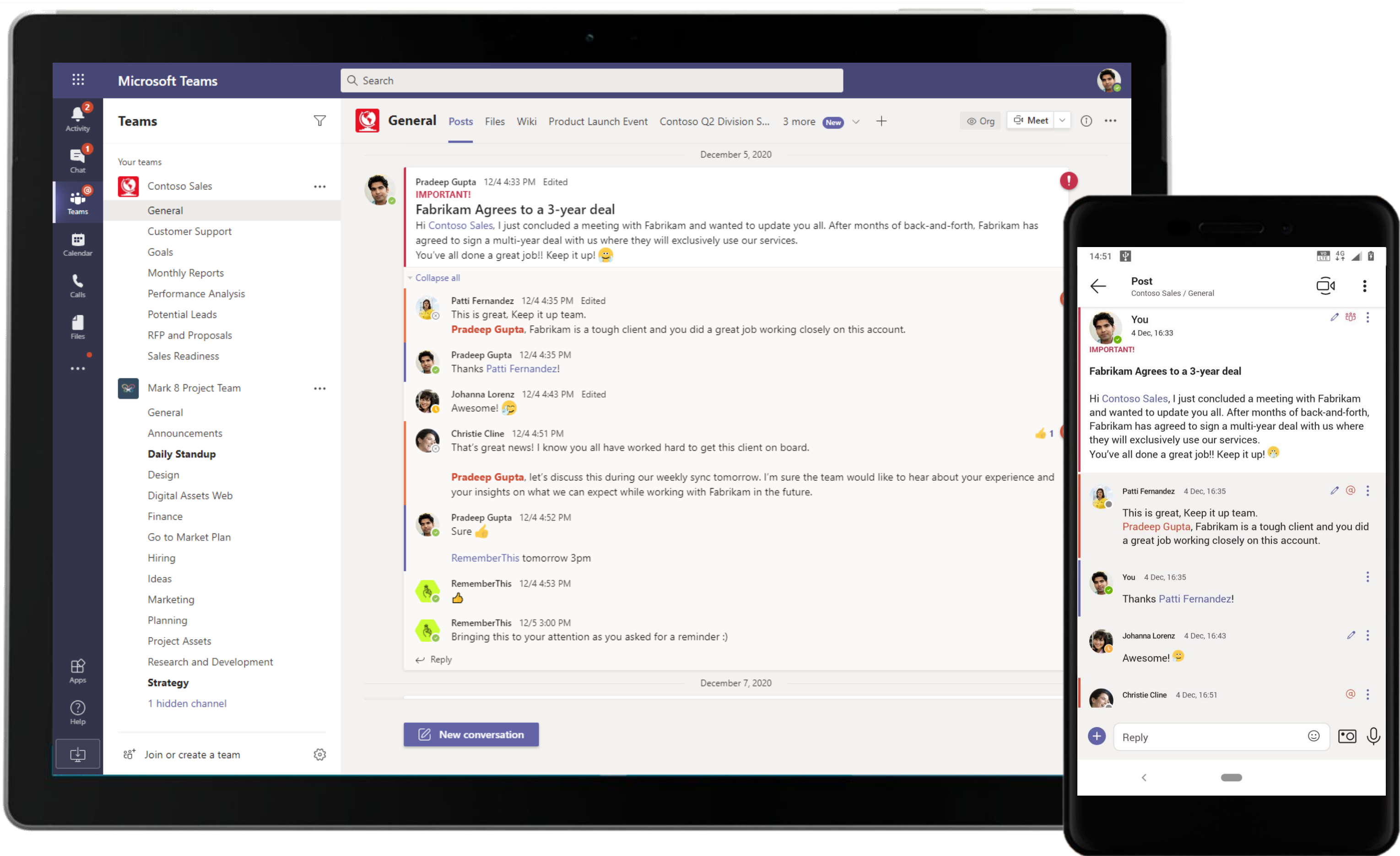
Places lets you look up detailed info about different businesses, restaurants, venues, and more. Find out the address, hours of operation, or reviews for a business with Places in Teams. The Sales Associate looks up the address for the meeting using Places.



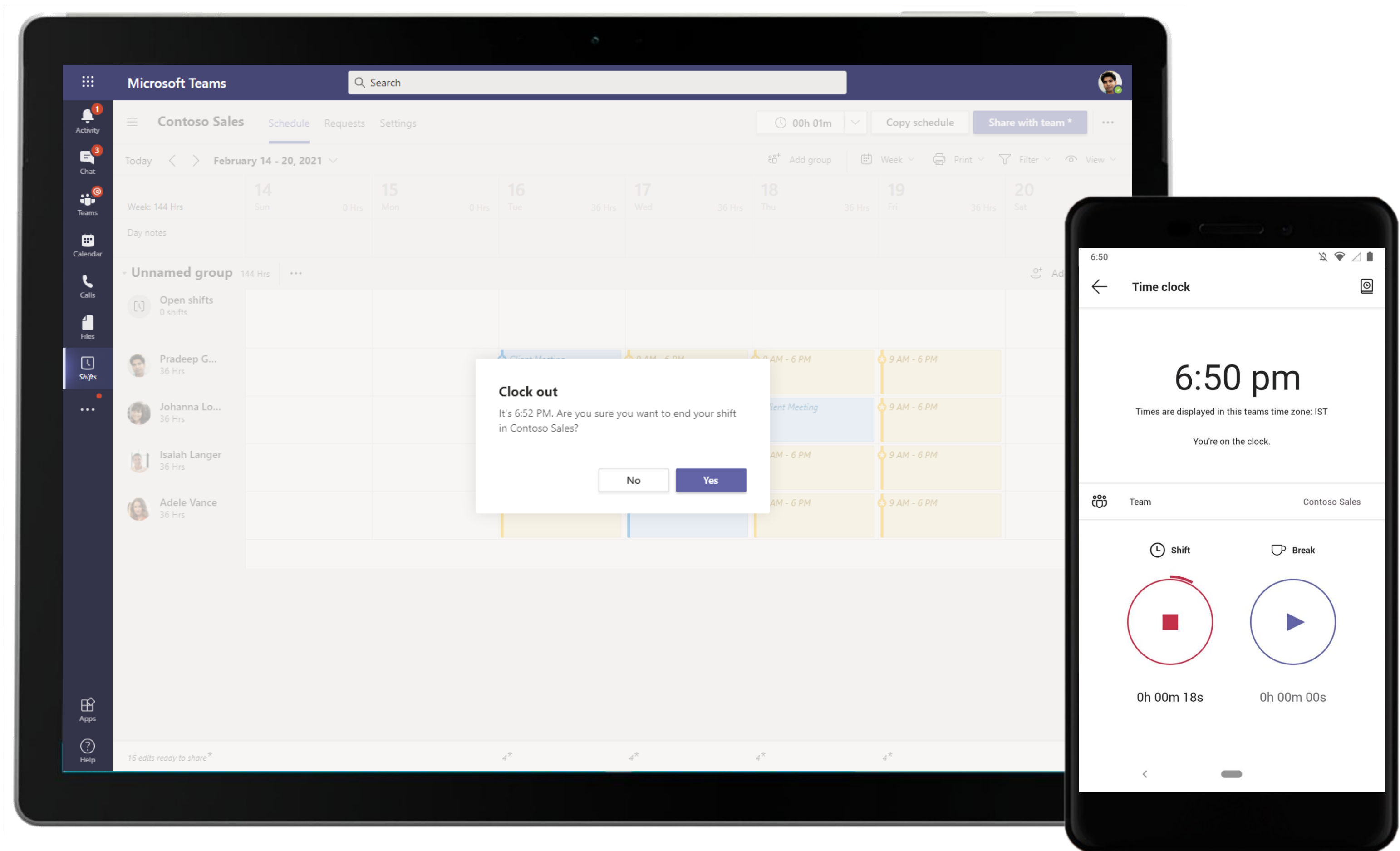
Use a private one-on-one chat or a group chat for conversations that don't require the entire team.
The Sales Associate quickly reaches out to the Finance Analyst using 1:1 chat.



Prepare powerful presentations with rich visual content and crystal-clear infographics using PowerPoint. The Sales Associate reviews the presentation before meeting the client.



RememberThis helps you avoid forgetting about important conversations, preventing them from disappearing in the stream of new content. By setting custom time-based reminders, RememberThis will add a reply to the conversation, bringing it back into your Activity Feed.



The Sales Associate uses Time Clock feature in Shifts to clock out. Shifts in Microsoft Teams is a powerful schedule management tool that helps you create, update, and manage schedules for your team.



Simplify Tasks and Focus on Selling

Account Executive

Scenario Walkthrough

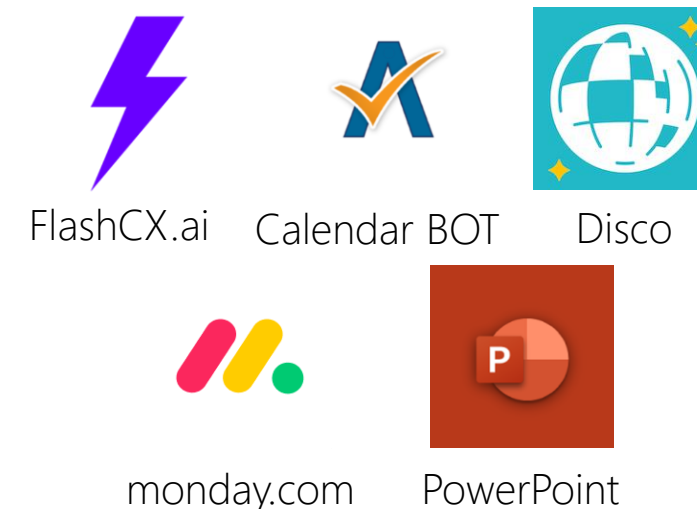
Routine tasks and scheduling can be time-consuming and take energy and attention away from connecting with customers and identifying prospects. When the Account Executive receives high-level contacts of clients that Contoso works with on other projects, she leverages applications within Teams to quickly connect with others within the Sales and Product teams to strategize a viable approach towards pitching the product to these potential clients. See how Microsoft Teams has helped the Account Executive save time and act swiftly on leads.

- Oversees task management board using monday.com in a channel tab.
- Views all the contacts shared within the channel via FlashCX.ai.
- Looks up free time and schedules a call with team members to discuss the way forward via Calendar BOT.
- Takes quick notes during the call within the Meeting Notes tab.
- Views the client portfolio shared for reference within the meeting chat via PowerPoint.
- Updates the team about winning the deal and receives appreciation via Disco.

How did Microsoft Teams help the Account Executive to execute her roles and responsibilities?

- Organize, structure, and streamline routine tasks using monday.com.
- Express appreciation and celebrate achievements with Disco.
- Share contacts and communicate with your CRM within Teams using FlashCX.ai.
- Look up your team member's free time and schedule a call easily using Calendar BOT.

Which app integrations on Teams made it possible?

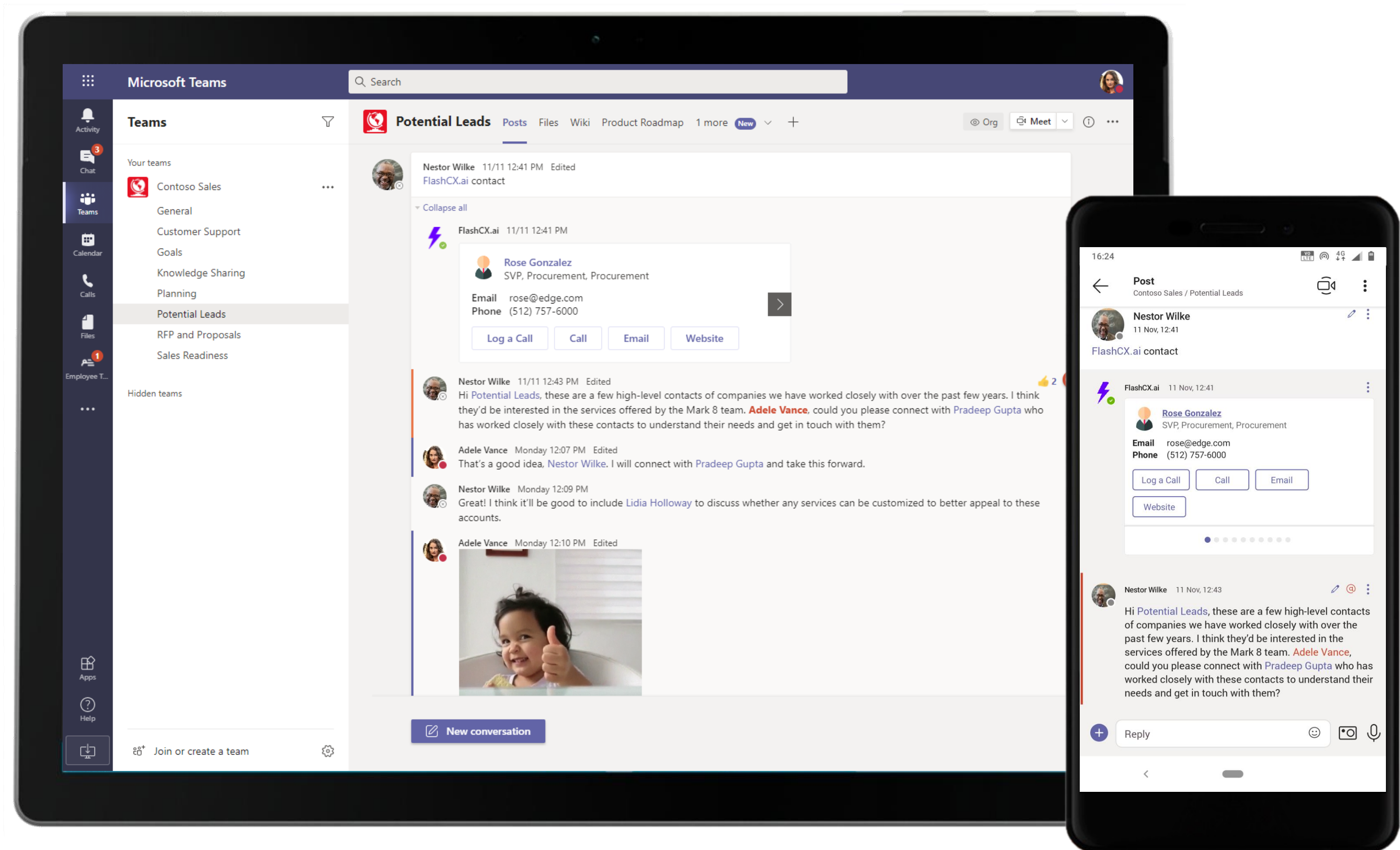


The screenshot illustrates the Microsoft Teams interface with the Monday.com integration. The desktop view shows the Teams sidebar on the left, the main channel 'Potential Leads' in the center, and a mobile view overlay on the right. The Monday.com board is titled 'Mark 8' and displays a Kanban view with columns for 'To Do' and 'In Progress'. The board includes a search bar, filters, and a 'New Item' button. The mobile view shows the same board on a smartphone, with a 'Main Table' view selected and a 'Create a new item' button at the bottom.

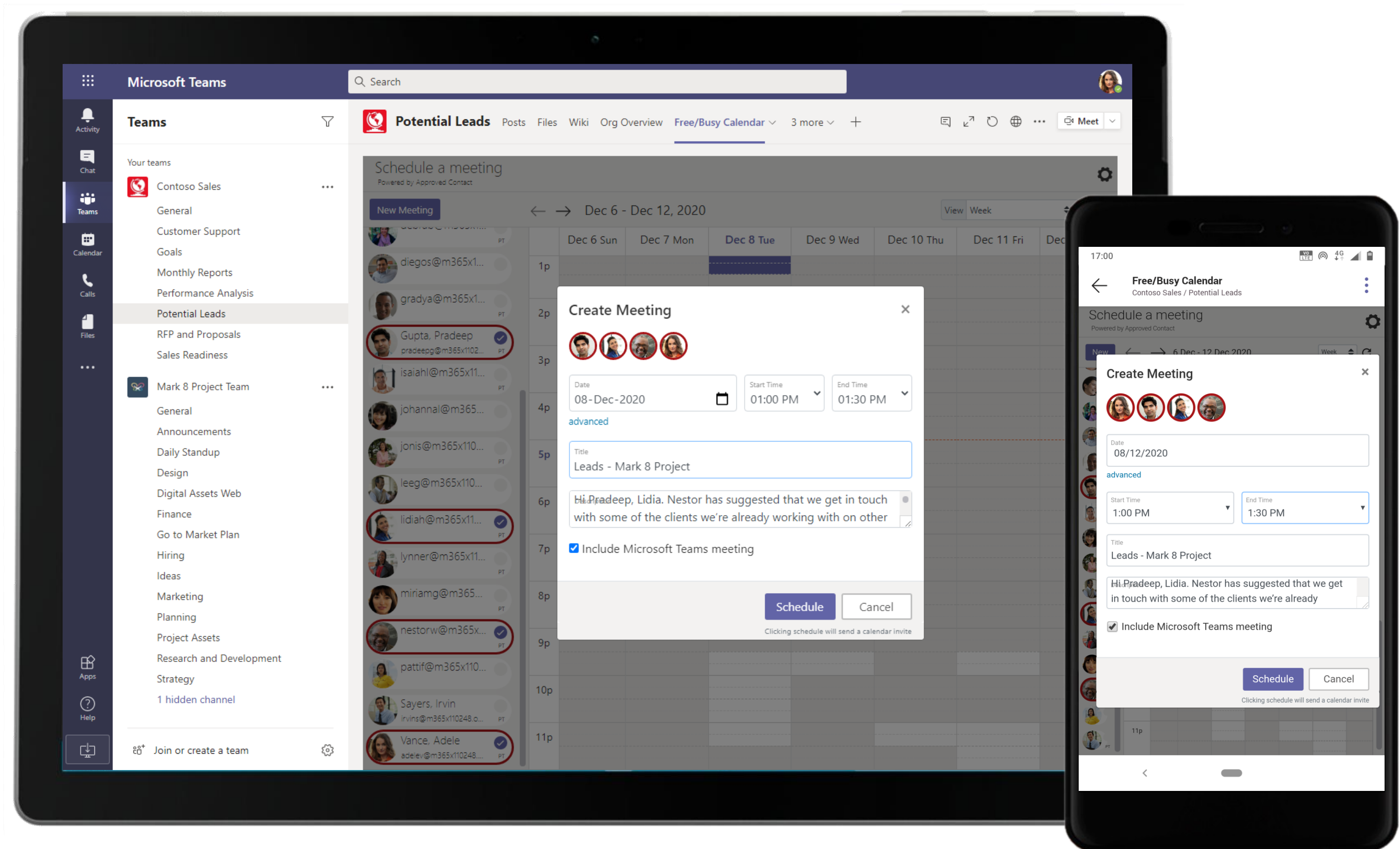
To Do	Person	Status	Date
Ad performance analysis	IS	Working on it	Feb 6
Spending strategy by advertising stream	IS	Working on it	Feb 12
Design for the new assets			Feb 11
Concepts for the new ads		Working on it	Feb 12
Social media calendar review		Done	Feb 12
+ Add			

In Progress	Person	Status	Date
Product roadmap design		Working on it	Feb 13
Prepare a detailed expense plan		Working on it	Feb 13
+ Add			

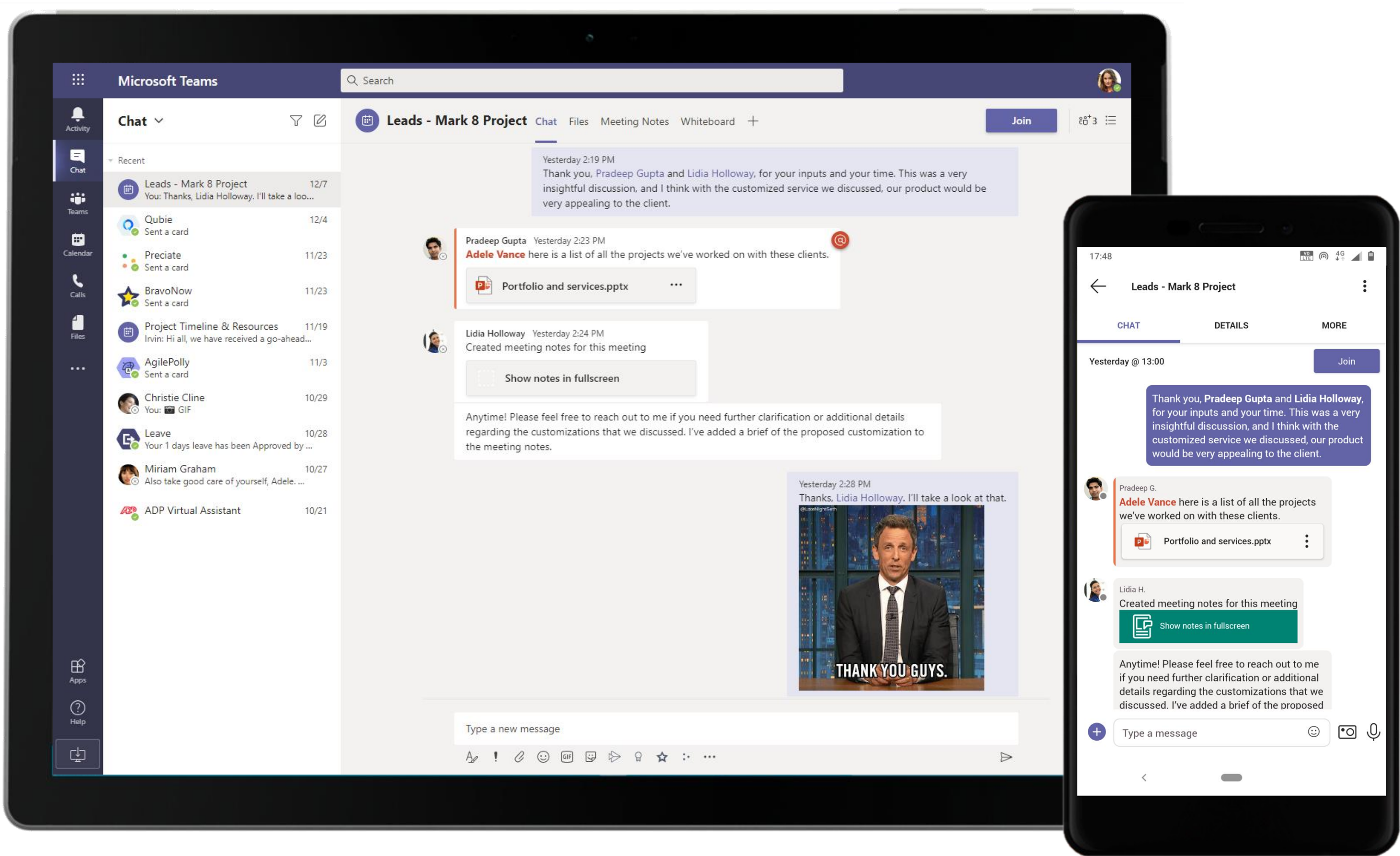
No more disjointed tools, frequent miscommunications, and chasing status updates: monday.com in Microsoft Teams connects your team so you can continue to collaborate, manage and track work in one easy-to-use platform, wherever you are.



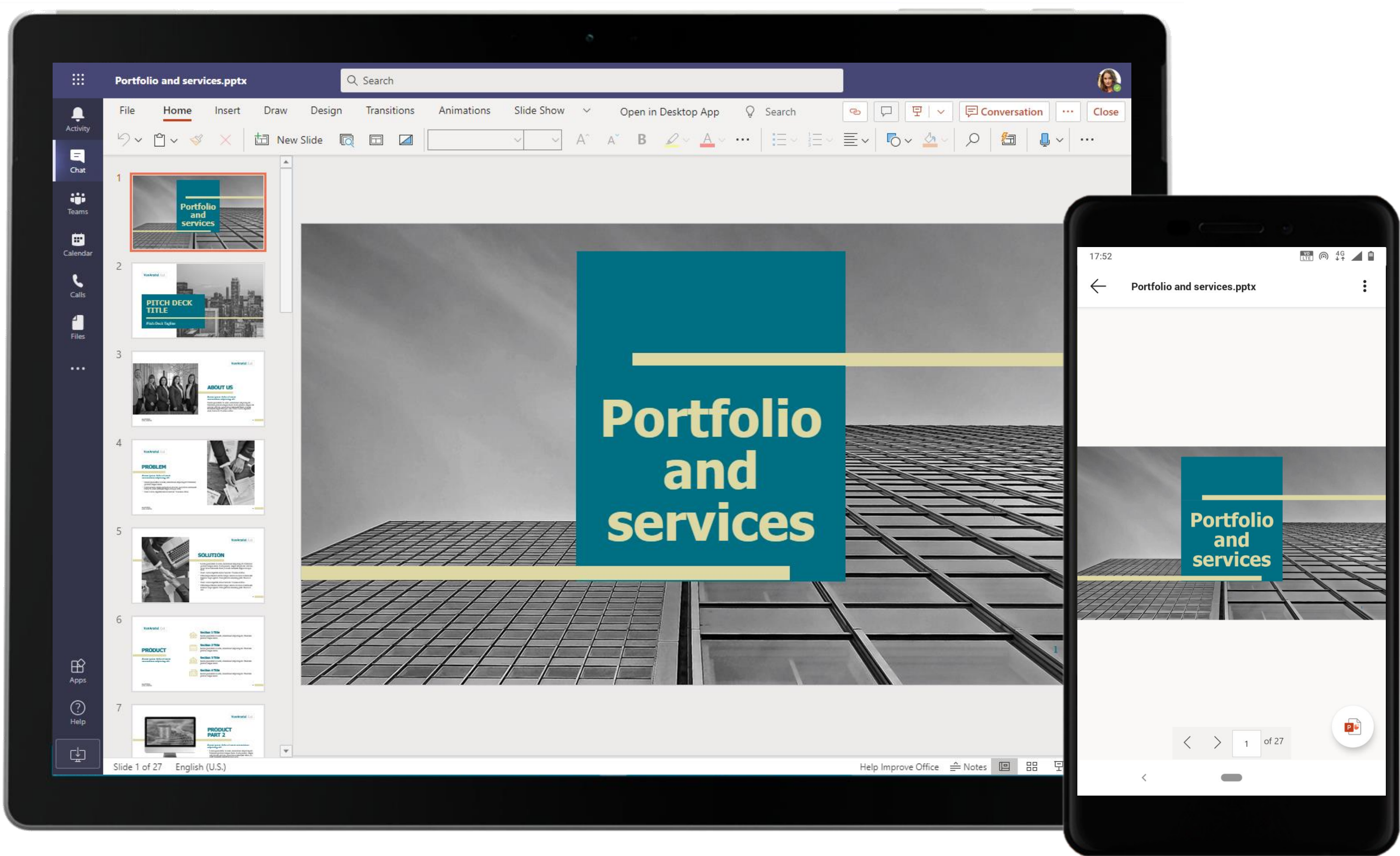
Use FlashCX.ai to interact with key objects like Opportunity, Account, Lead, Contacts, Activity and Service Requests. The Account Executive views the contacts shared in the channel via FlashCX.ai.



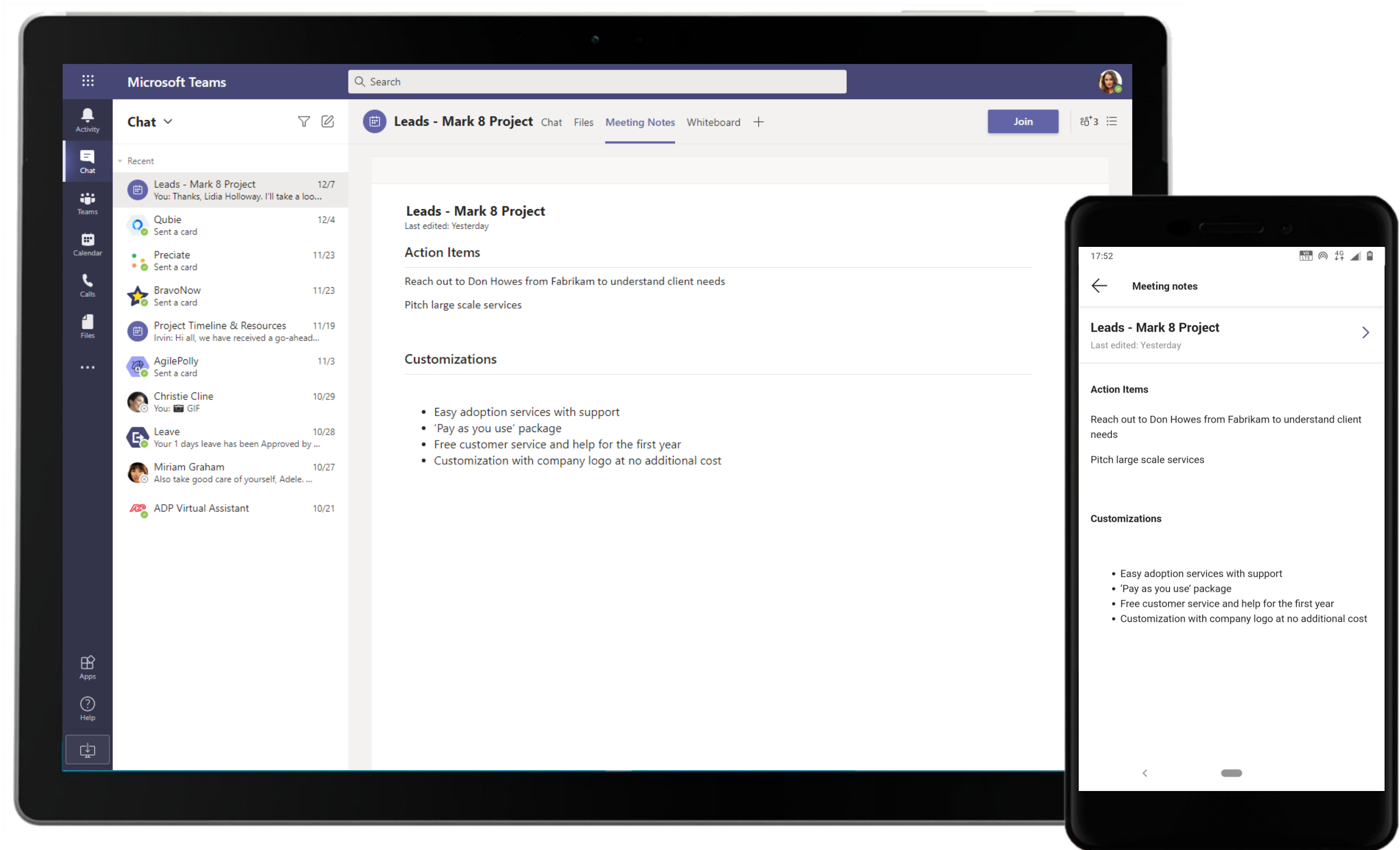
The Calendar BOT in Teams enables calendar comparison and scheduling. The Account Executive schedules a meeting after comparing calendar and view free time of the Sales Executive and the Project Manager.



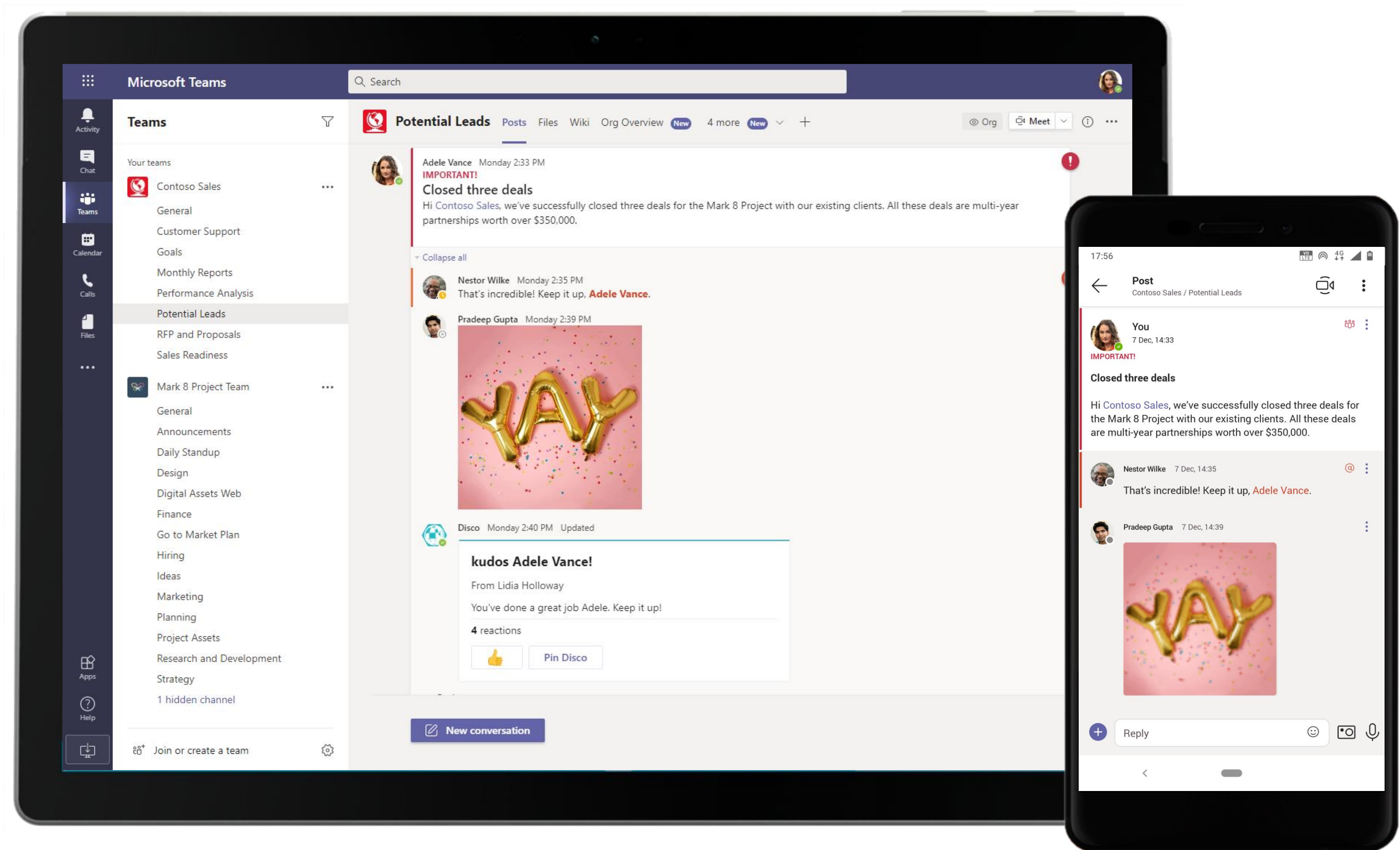
Use the meeting thread for follow-up conversation about meeting outcomes. The team uses the thread to share meeting note and files with team members.



Prepare powerful presentations with rich visual content and crystal-clear infographics using PowerPoint. The Account Executive views portfolio and services information via PowerPoint shared in a meeting thread.



During a meeting, participants can use rich meeting capabilities such as video, screen sharing, file sharing, meeting notes and chat for an engaging, productive and decisive conversation with each other.



Disco makes it easy to celebrate your company culture and values. Recognize people in real-time when they live your values. The Account Executive receives appreciation via Disco.



Create Customized Sales Presentations Faster

Sales Specialist

Scenario Walkthrough

Creating powerful presentations is one of the most essential tasks of sales workstream. An Account Executive who's pitching a service to a client, reaches out to the Sales Specialist for help. The Sales Specialist quickly reviews the presentation, leverages search features to access information across multiple teams, and communicates with the Account Executive to ensure that the sales team is well-prepared to put their best foot forward.

- Responds to the Account Executive who requests for his help with a presentation via 1:1 chat.
- Views the presentation shared by the Account Executive and reviews comments left via PowerPoint.
- Searches through the files within the organization to find relevant trends and data that can be added to the presentation.
- Accesses files in the research team to find industry-specific research to be added to the presentation in a Word document.
- Adds new slides to the presentation and resolves the comment via PowerPoint.
- Notifies the Account Executive of the completion of the presentation.
- Congratulates the Account Executive on the win and responds to appreciation from other team members.

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

- Collaborate on visually rich presentations over the cloud with PowerPoint.
- Search through your entire library of files shared within a team easily using the Files tab.
- Review and create content that can be easily shared using Word, Excel, and other Office 365 applications.

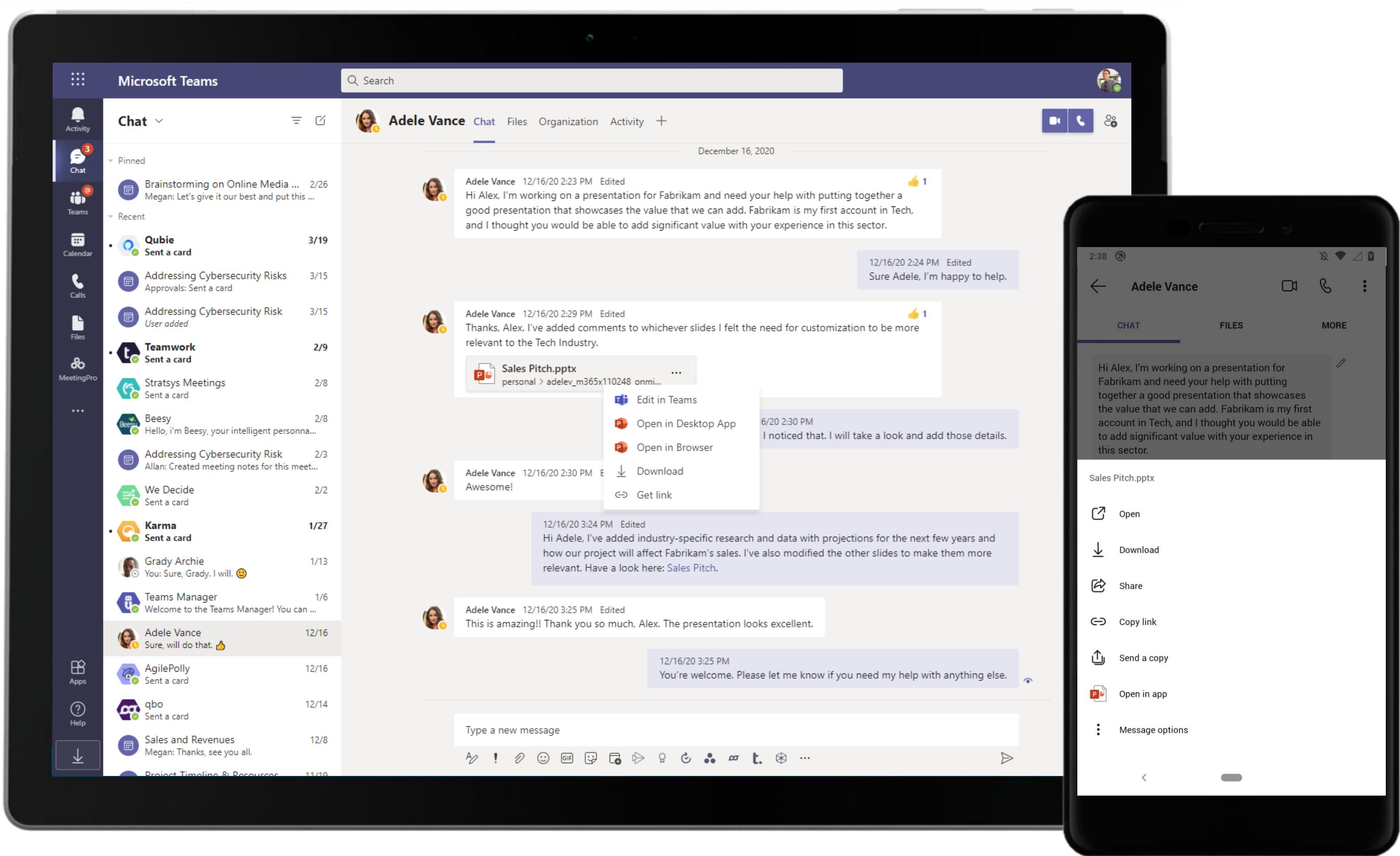
Which app integrations on Teams made it possible?



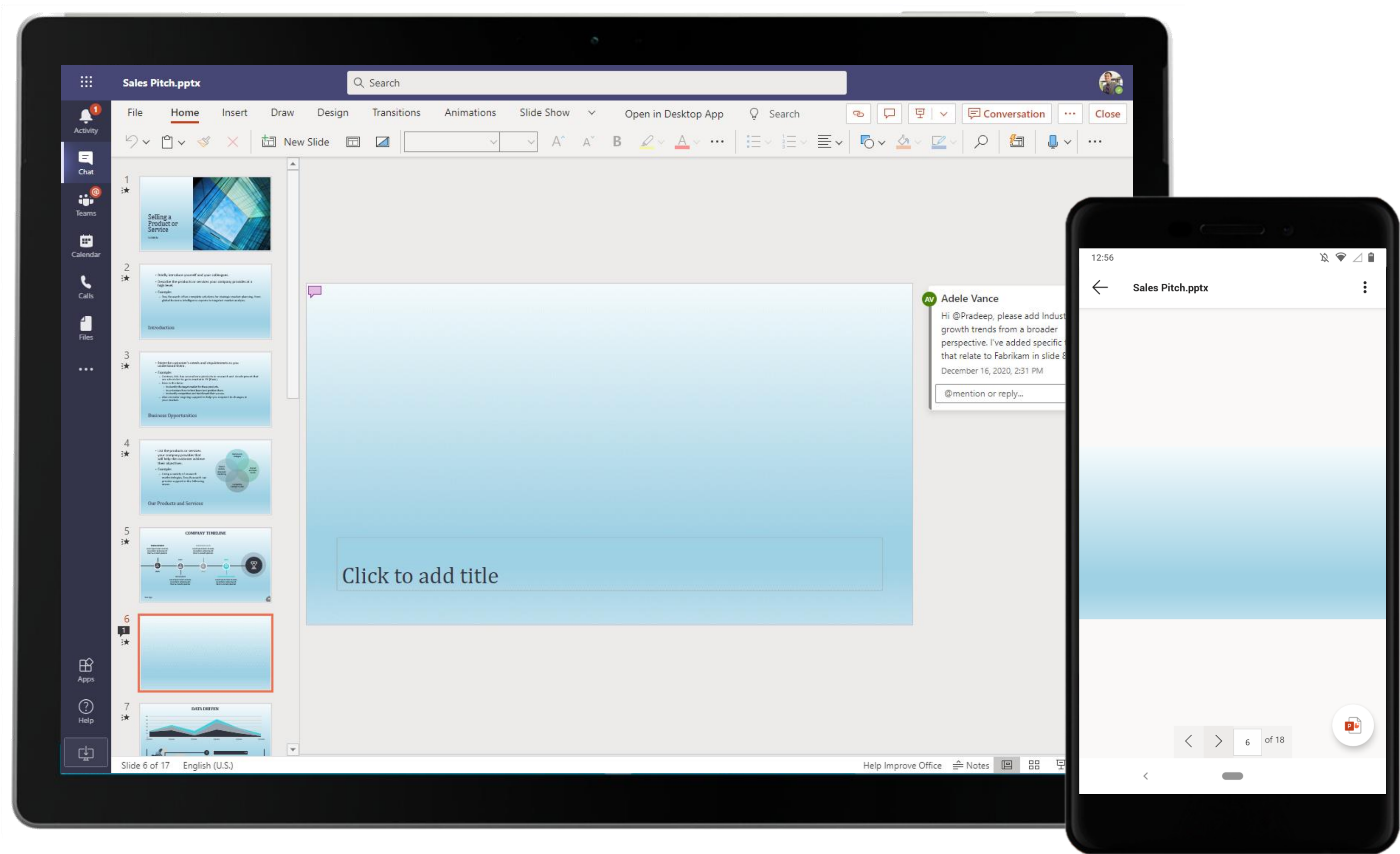
PowerPoint



Excel



When a file is shared, the file preview is available in the message, along with all file actions such as Open online, Download, and Copy link. By default, the file opens in Teams.



Utilize PowerPoint to draft and present an effective and easily consumable presentation for the team. Collaborate with each other with the integrated PowerPoint services in Teams.

The image illustrates a workflow for creating sales presentations using Microsoft Office applications. A tablet displays a Teams chat window with a file list on the left and a spreadsheet titled "Trends and Sentiment.xlsx" on the right. The spreadsheet shows two bar charts: "OPENING THE PACKAGE" and "PACKAGE CONTENT VS. DESIGN". The smartphone displays a mobile view of the same Teams chat, showing the file list and the spreadsheet content.

File List (from both devices):

- Market Trends & Analysis.pptx 11/18 Mark 8 Project Team / Shared Documents
- Purchase Trends.xlsx 12/9 Marketing / Shared Documents
- Market Trends 12/14 Contoso-Fabrikam Partnership /
- Trends and Sentiment.xlsx 1h ago Marketing / Shared Documents
- European Tech Trends.docx 8/4/17 Contoso Sales / CampaignsEvents
- Trends behind the lens.docx 9/20/16 Contoso Sales / CampaignsEvents
- Stand-out trends from NYF... 9/20/16 Contoso Sales / CampaignsEvents
- Smart home trends to watch...9/20/16 Contoso Sales / CampaignsEvents
- Sales Pitch.pptx 12/14 Contoso Sales / Shared Documents
- Electronics Store Trends in Int...8/4/17 Retail / Shared Documents
- Untitled Section 43m ago Contoso Sales / Shared Documents
- Q4 Marketing Analysis.xlsx 1h ago Contoso Sales / Shared Documents
- Sales Summary.xlsx 2h ago Contoso Sales / Shared Documents
- Branding Elements.pptx 1/23/16 Contoso Sales / Shared Documents
- International Marketing Cam... 8/9/17 Contoso Sales / Shared Documents

Spreadsheet Data (Trends and Sentiment.xlsx):

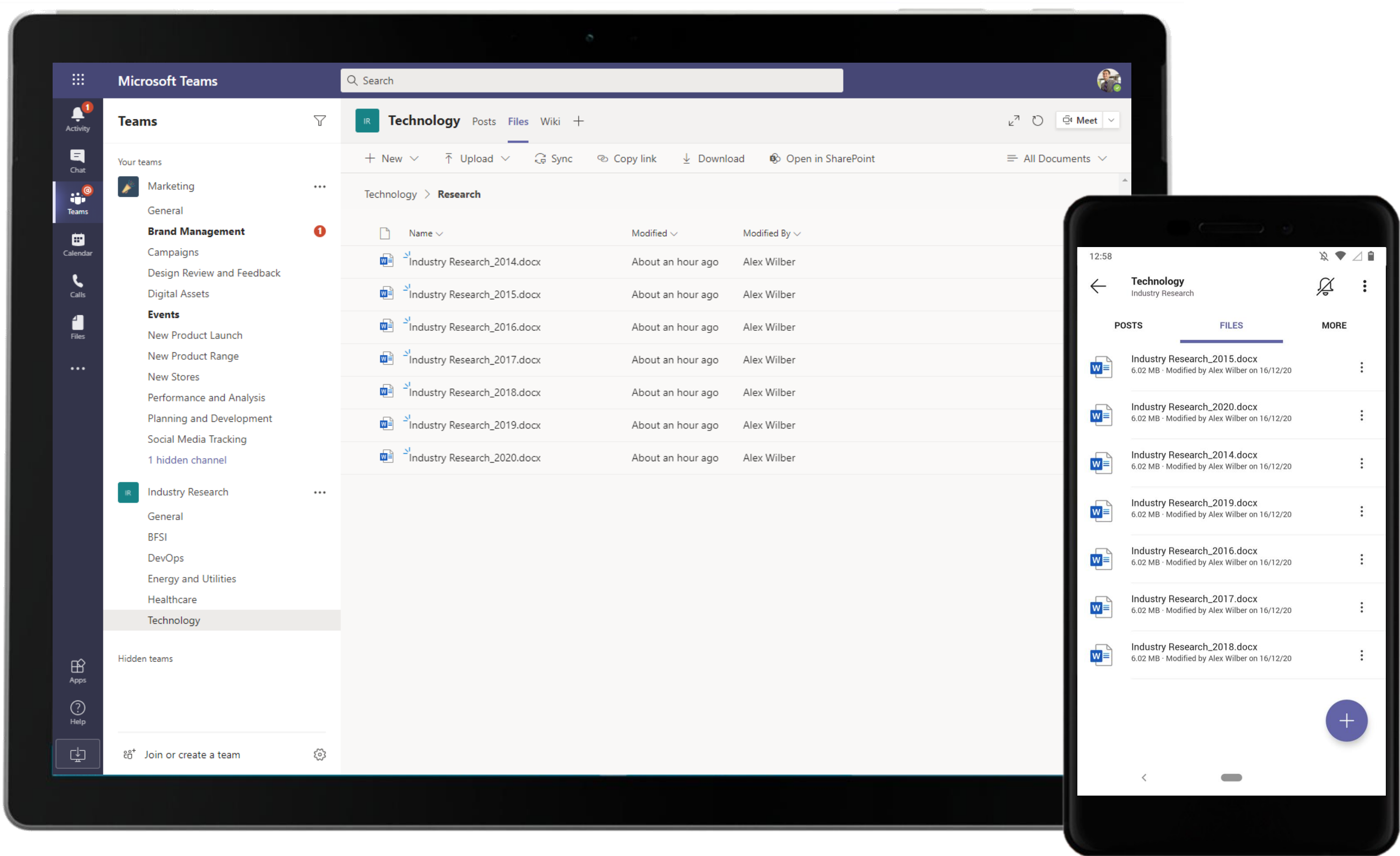
OPENING THE PACKAGE

Package	Excited	Curious	Neutral	Confused	Frustrated	Angry
Package 1	3	1	1	1	1	1
Package 2	2	1	1	1	1	1
Package 3	1	1	1	1	1	1
Package 4	1	1	1	1	1	1
Package 5	1	1	1	1	1	1

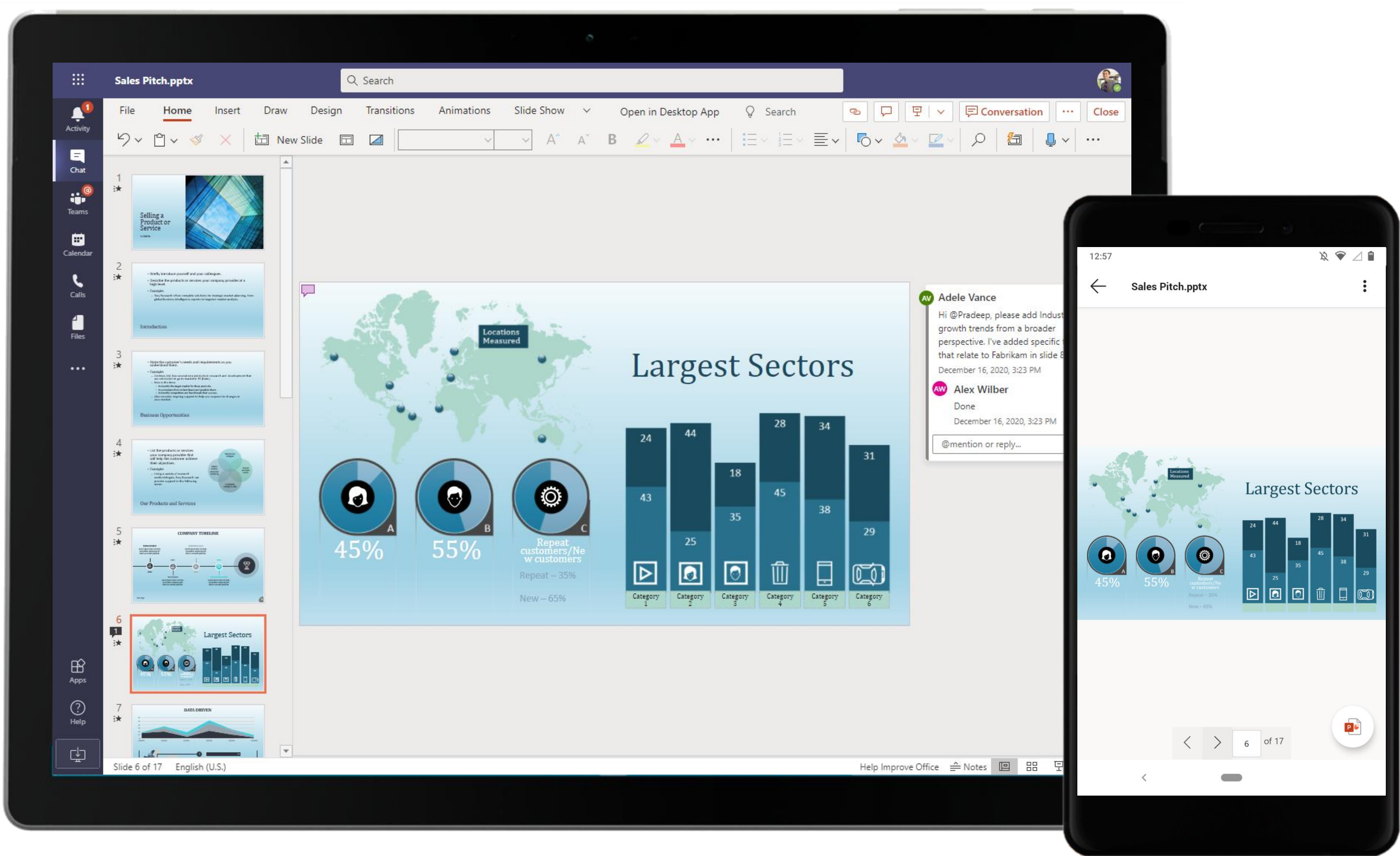
PACKAGE CONTENT VS. DESIGN

Package	Excited	Curious	Neutral	Confused	Frustrated	Angry
Package 1	1	1	1	1	1	1
Package 2	1	1	1	1	1	1
Package 3	1	1	1	1	1	1
Package 4	1	1	1	1	1	1
Package 5	1	1	1	1	1	1

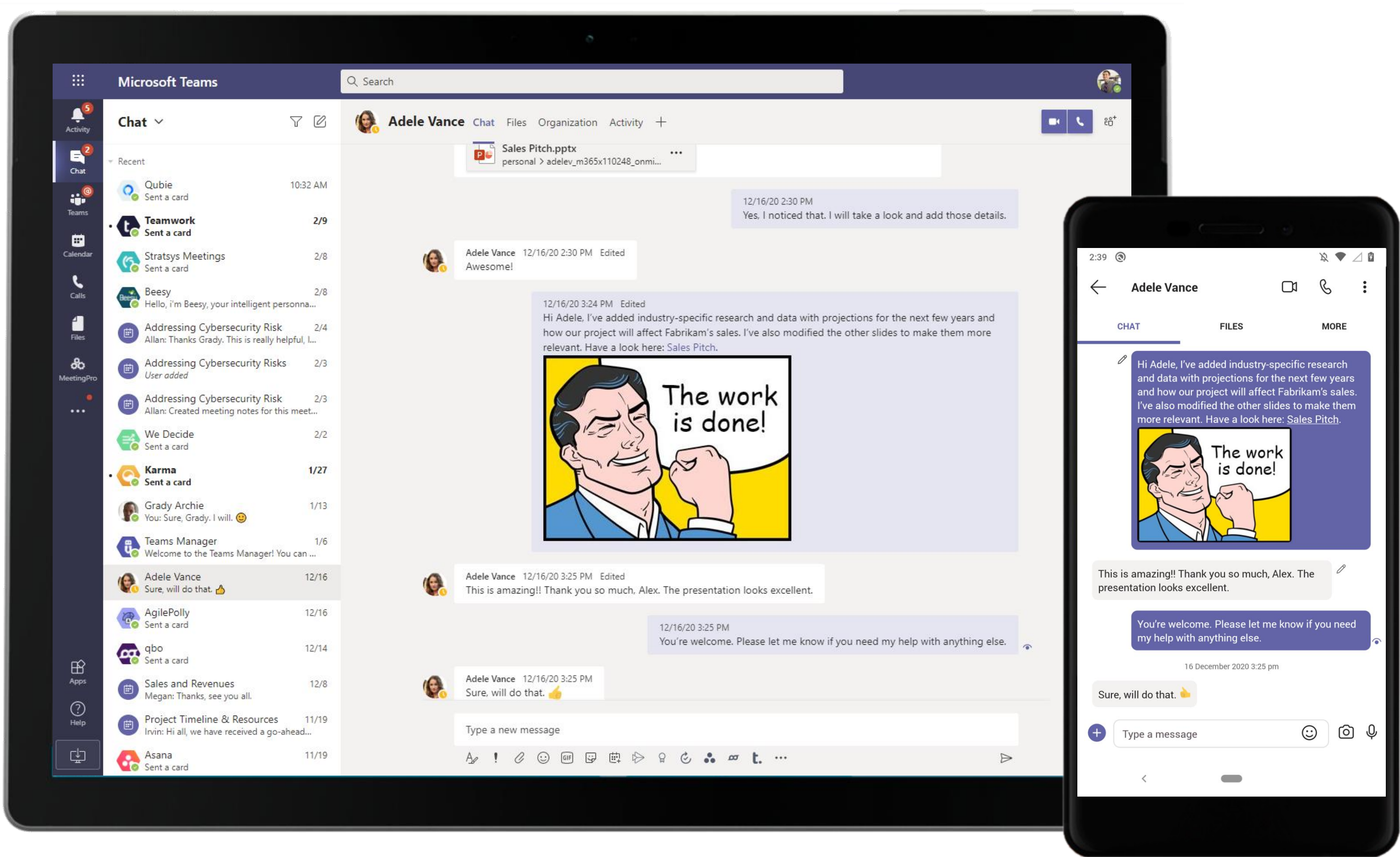
Store and share important files within a cloud-enabled repository with Files. The Sales Specialist searches through the files within the organization to find relevant trends and data that can be added to the presentation.



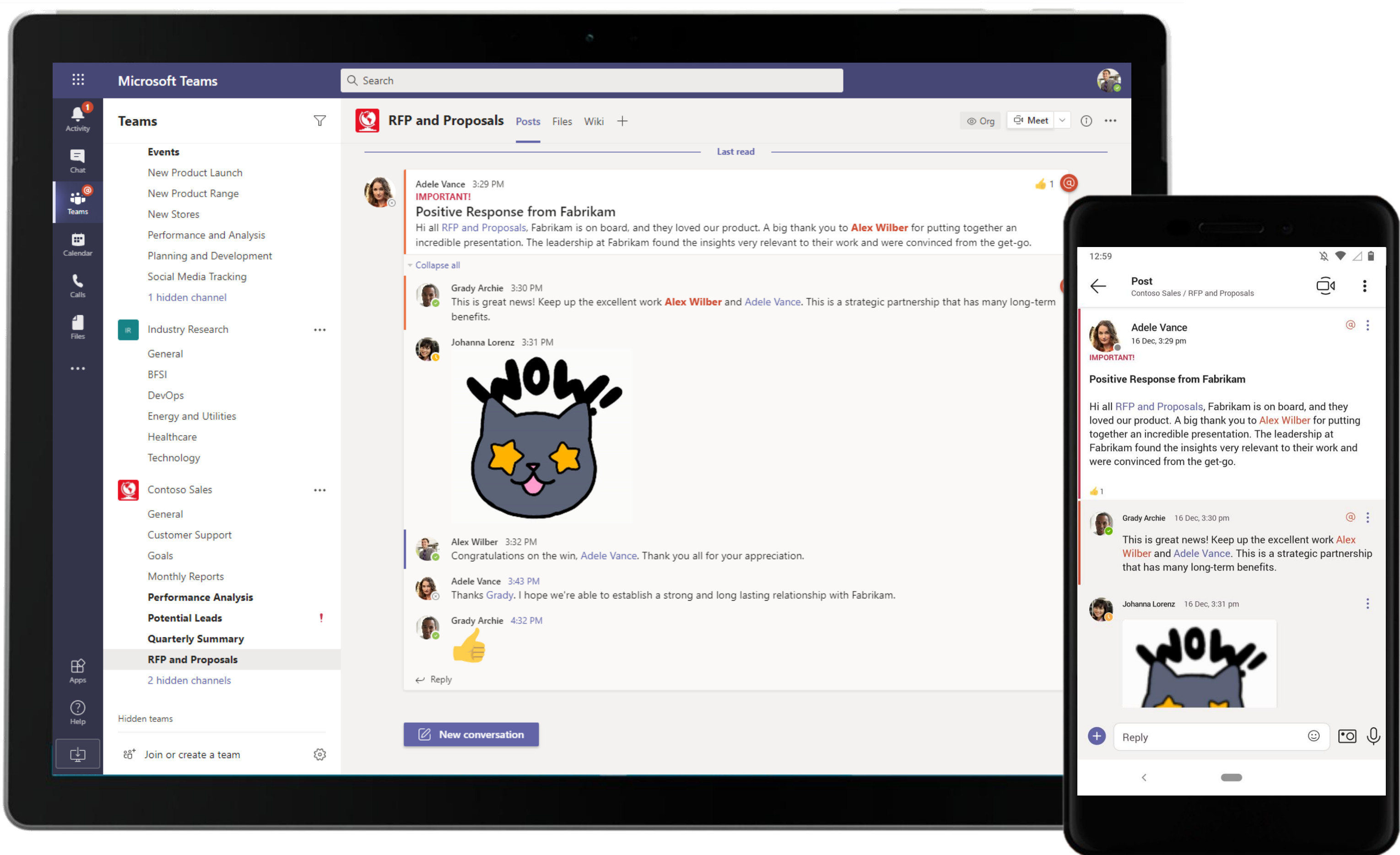
The Files tab in each channel is a cloud-enabled repository, where team members can store and share important files within a safe environment.



Create clear and concise presentations with PowerPoint in Teams. The Sales Specialist views the comment and resolves it after looking at data from organization.



Use a private one-on-one chat or a group chat for conversations that don't require the entire team.
The Sales Specialist updates the Account Executive using 1:1 chat.



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



Engage with Your Customers More Easily

Sales Associate

Scenario Walkthrough

Due to the changing digital world, sales professionals need to stay updated with new information of the market and the data available to them at the organization level. They need to upskill themselves with new information and use readily available information at the same time. This helps them to act as a trusted advisor to customers and establish relationships to earn customer loyalty. See how the Sales Associate uses Microsoft Teams to contact a customer with ease for quick assistance.

- Views a sales inquiry about the option to exchange products for a discount from a potential lead and responds to the lead via Zoho Desk.
- Notifies the team about the lead and suggests the addition of an exchange program via channel communication.
- Responds to the Sales Manager in the channel conversation thread and picks up the lead.
- Schedules a meeting with the external client and configures a Decisions tab to keep track of the meeting agenda and record decisions.
- Sends the purchase agreement to the client for his signature via Zoho Sign.
- Shares the updated status of the opportunity within a channel using Salesforce.

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

- Collaboration on customer tickets and respond to customers with Zoho Desk
- Sharing of Salesforce records in Teams chats and conversations enables quick collaboration on record details.
- Leverage meeting extensibility features to use your favorite apps within meetings.

Which app integrations on Teams made it possible?



Zoho Desk



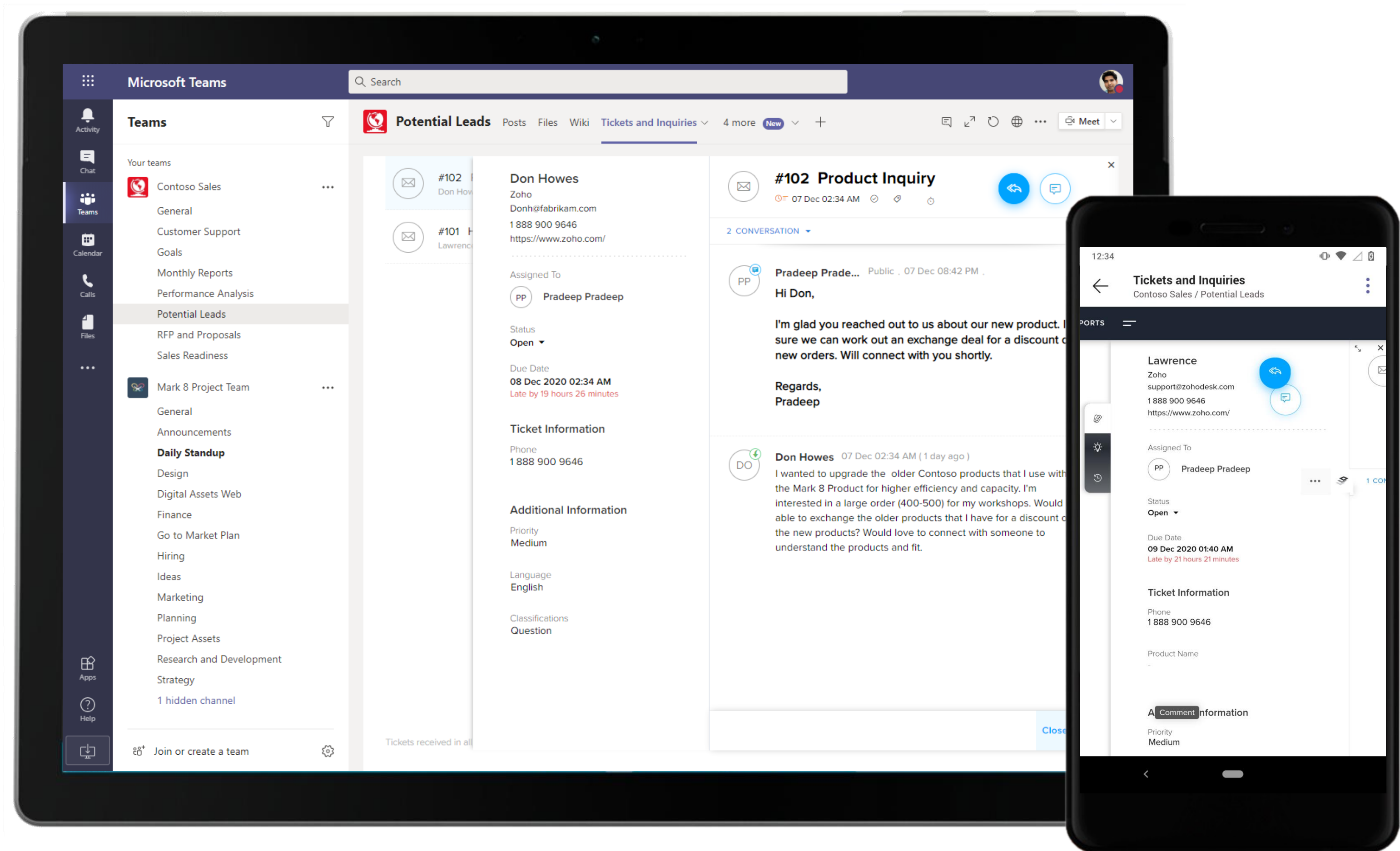
Salesforce



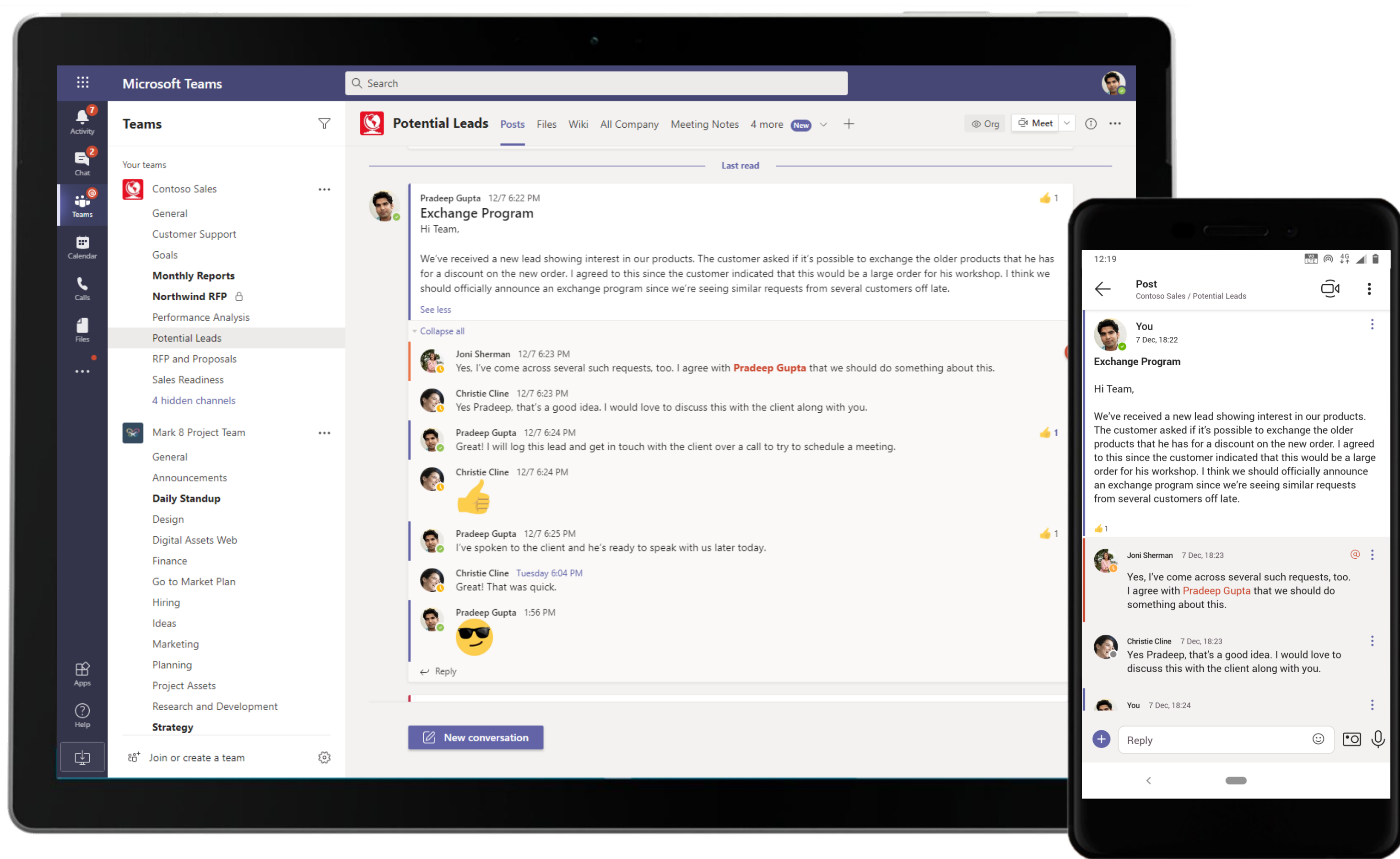
Decisions



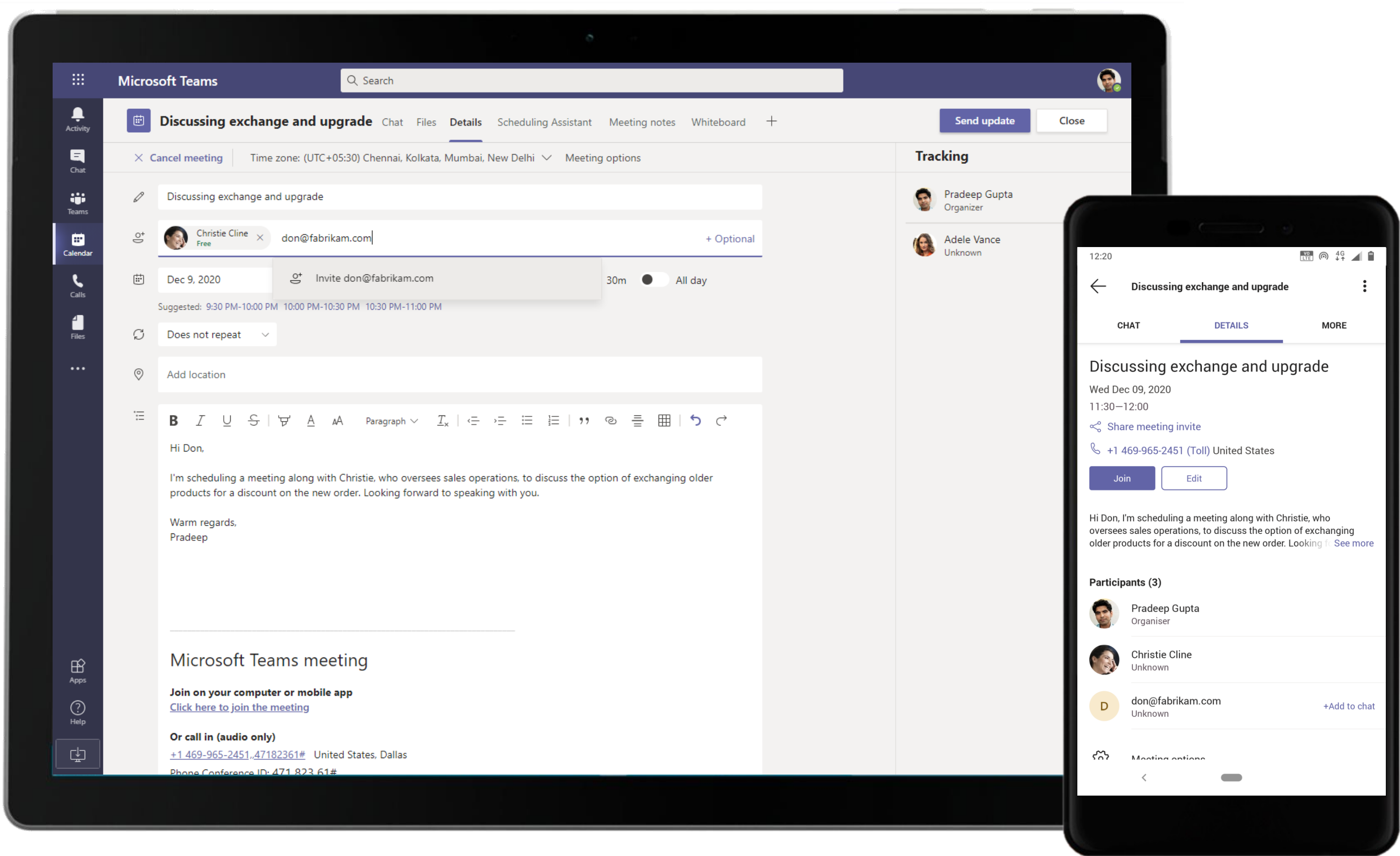
Zoho Sign



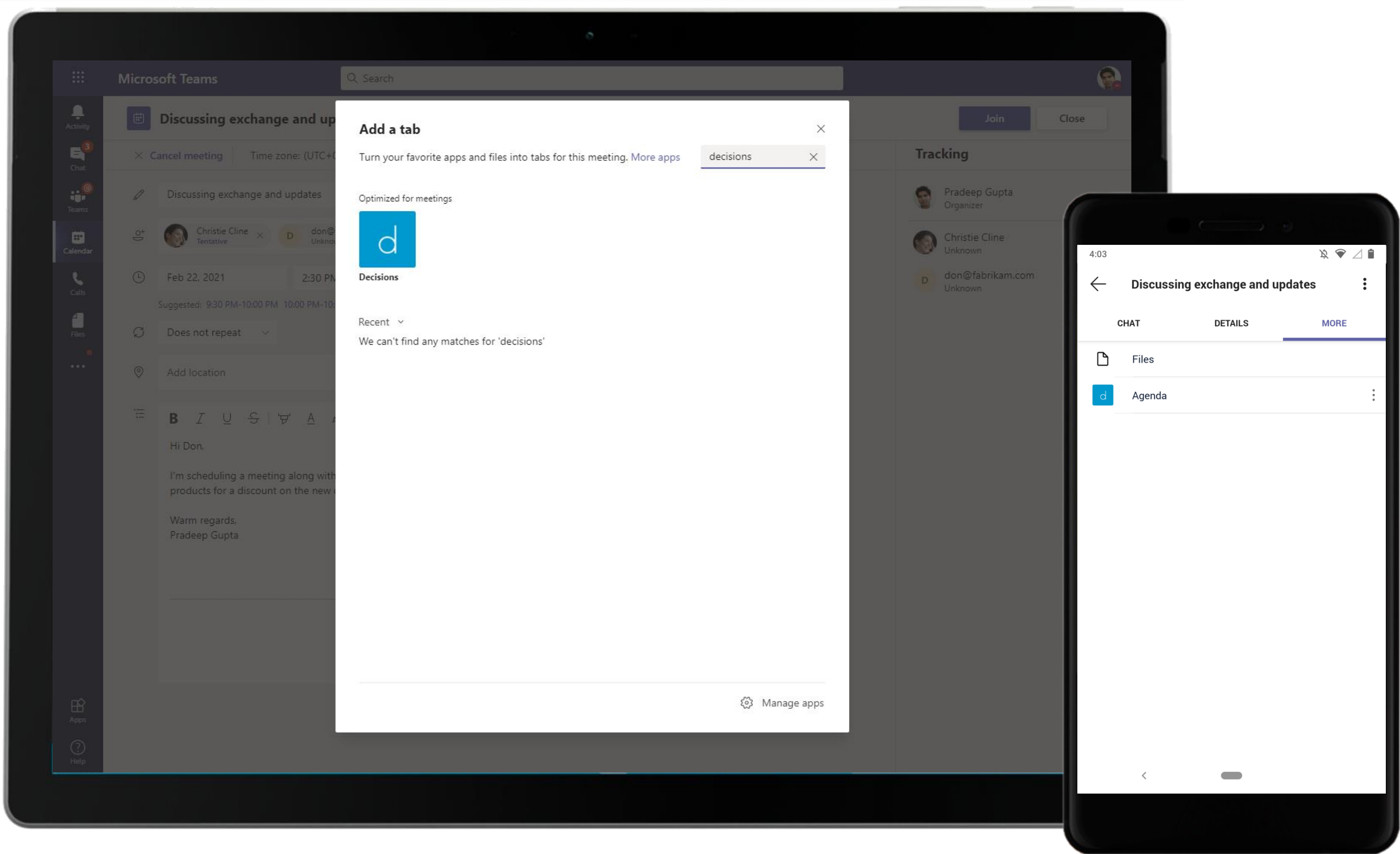
Help your agents become more productive, managers become more impactful, and customers become more empowered with Zoho Desk in Microsoft Teams. The Sales Associate views a product-related query from a customer.



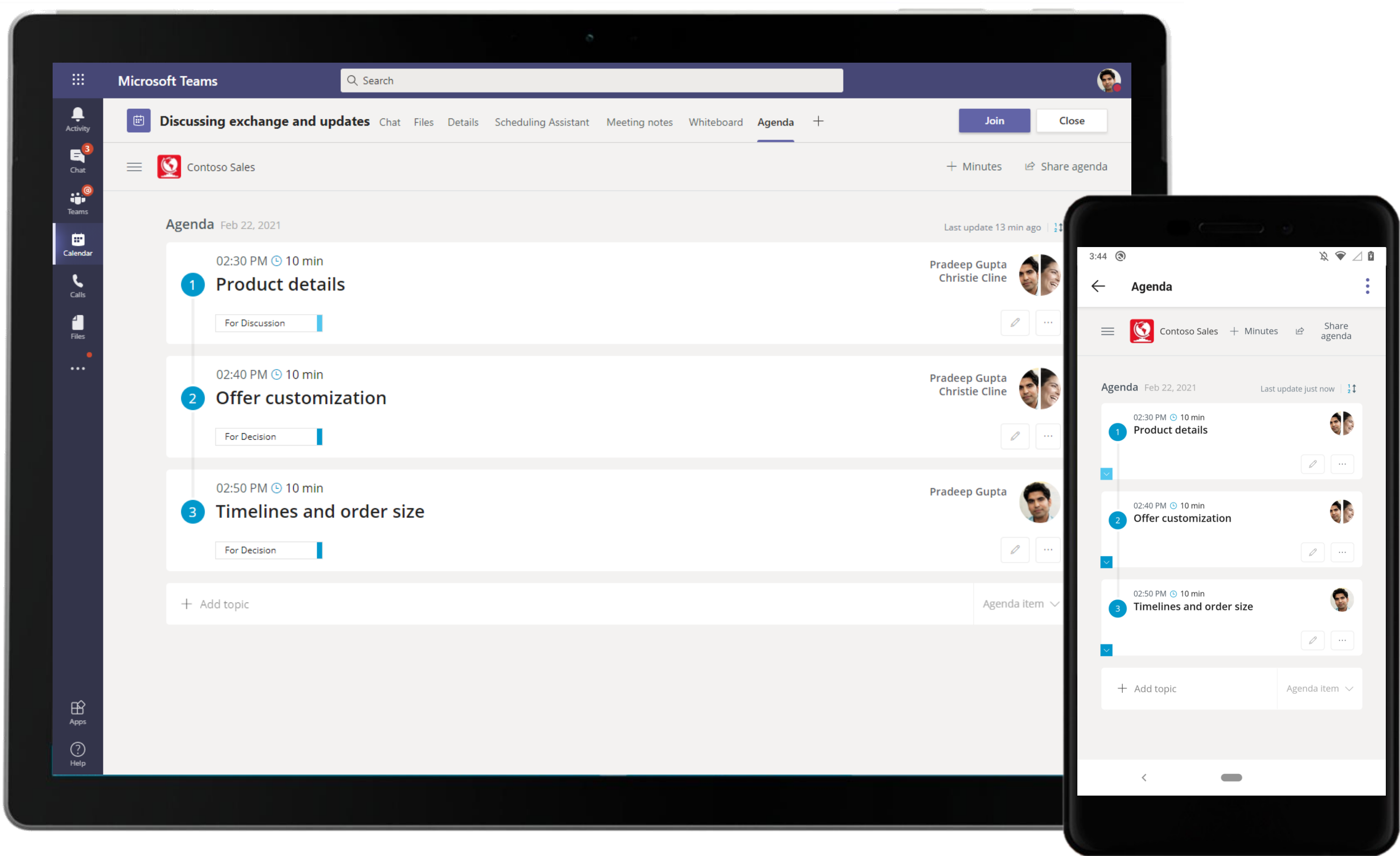
Channels facilitate instant group communication. Team members stay in the know and can share information directly in the conversation thread to accelerate decision-making.



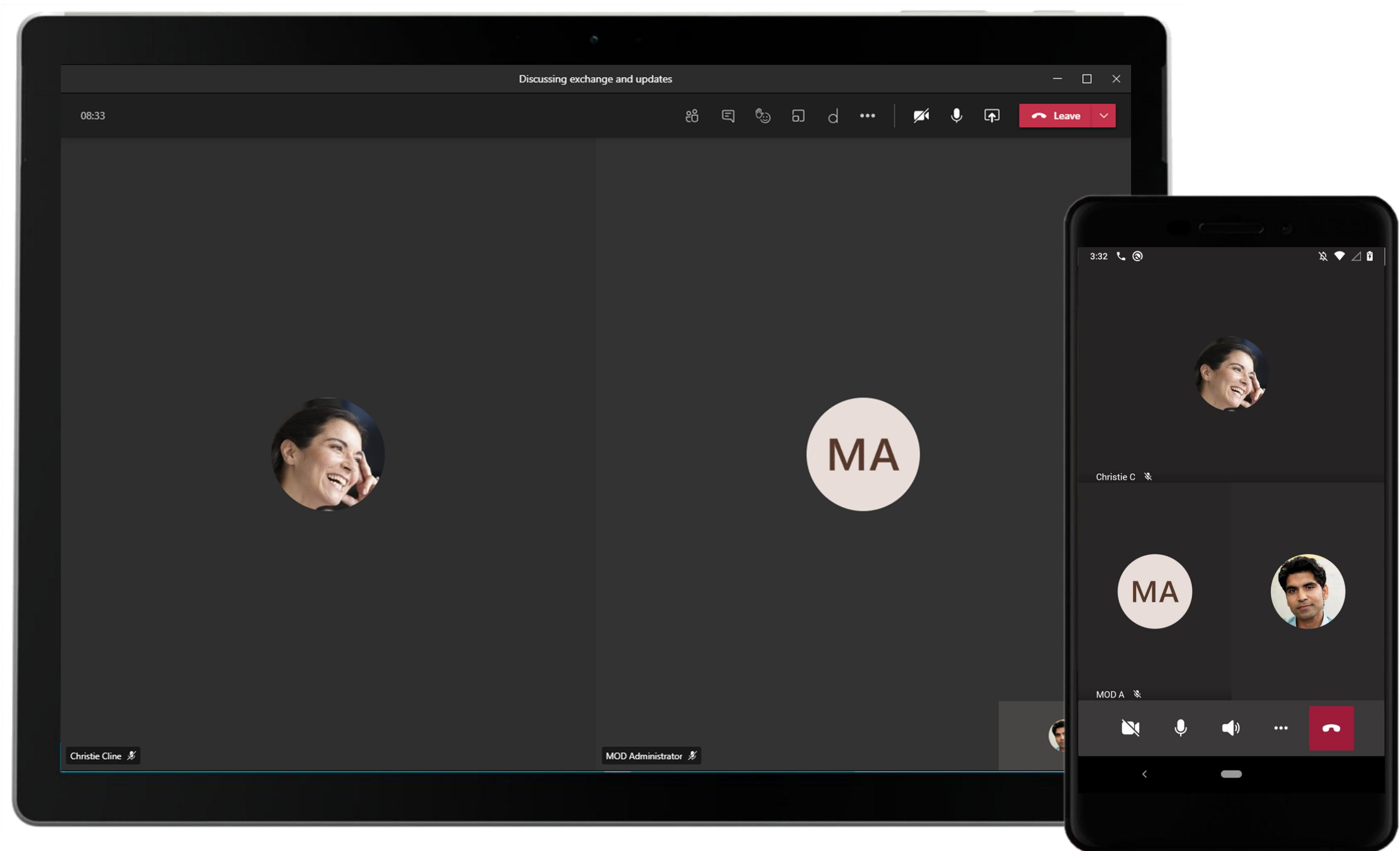
Complete meeting solutions in Teams support screen sharing, recording, video and audio conferencing. Scheduling Assistant feature suggests times that are optimal for all attendees.



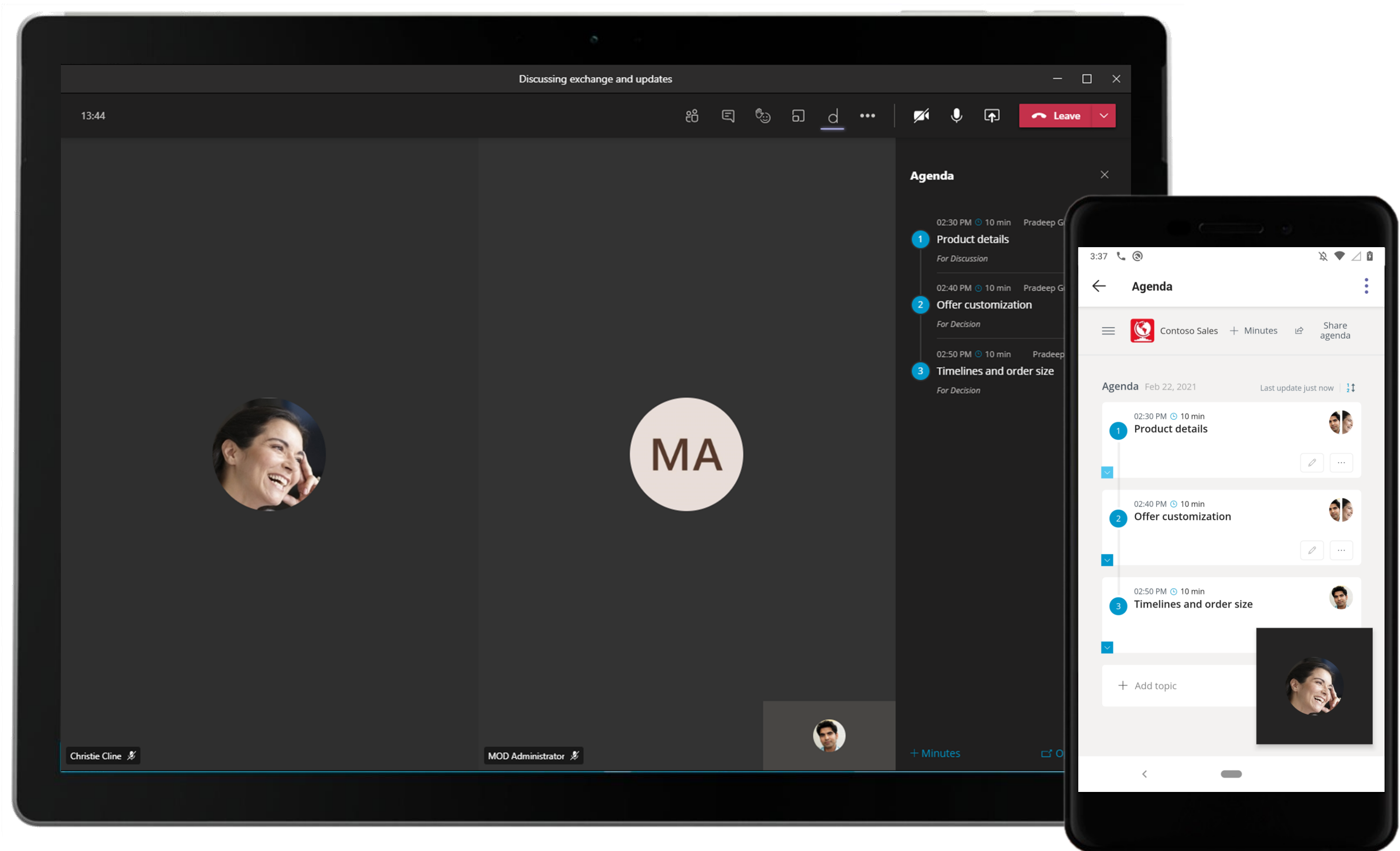
Use tabs to configure relevant apps for your meeting. The Sales Associate configures Decisions app in a tab for the meeting.



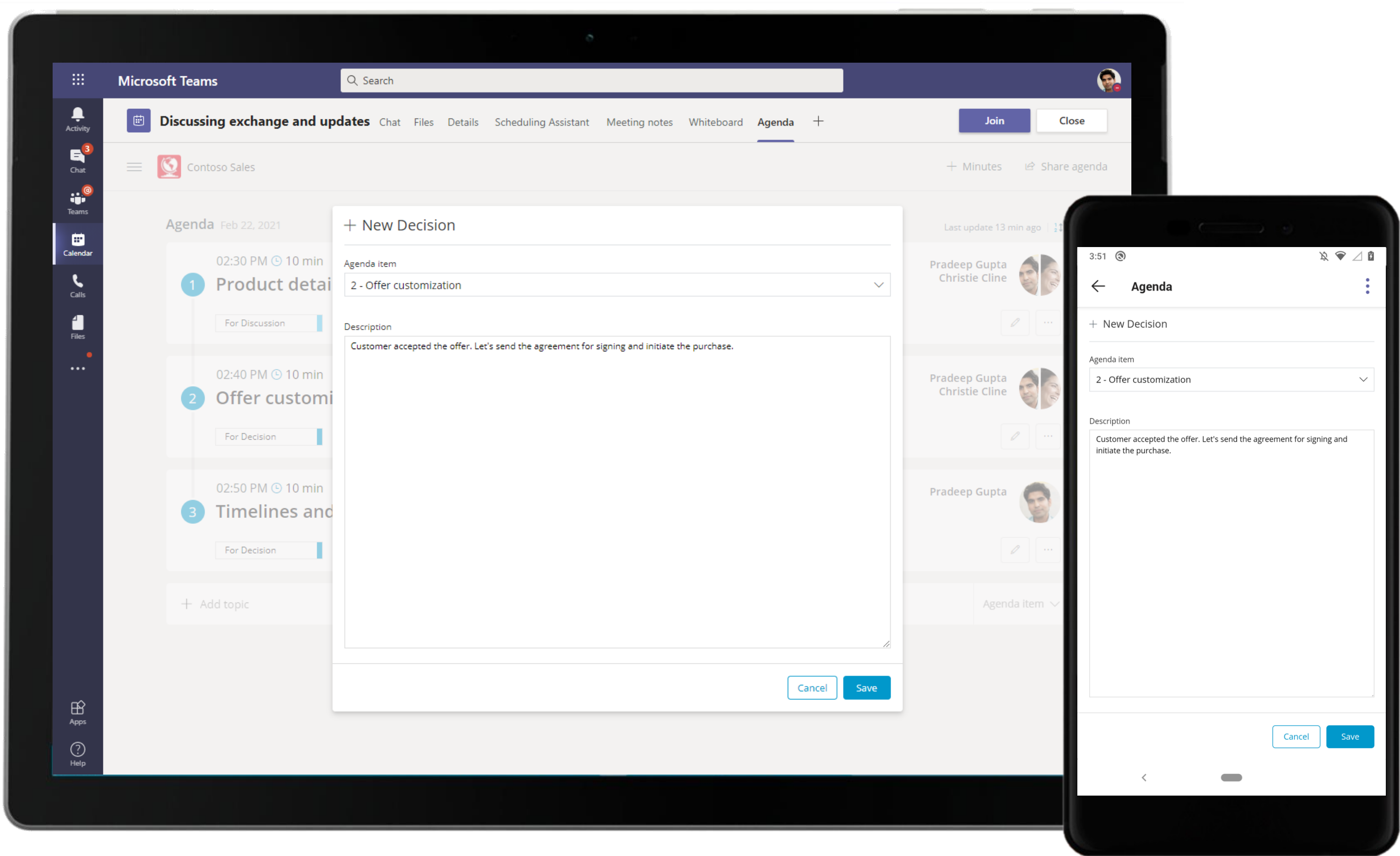
Create agendas and manage your meetings without leaving Microsoft Teams with Decisions.



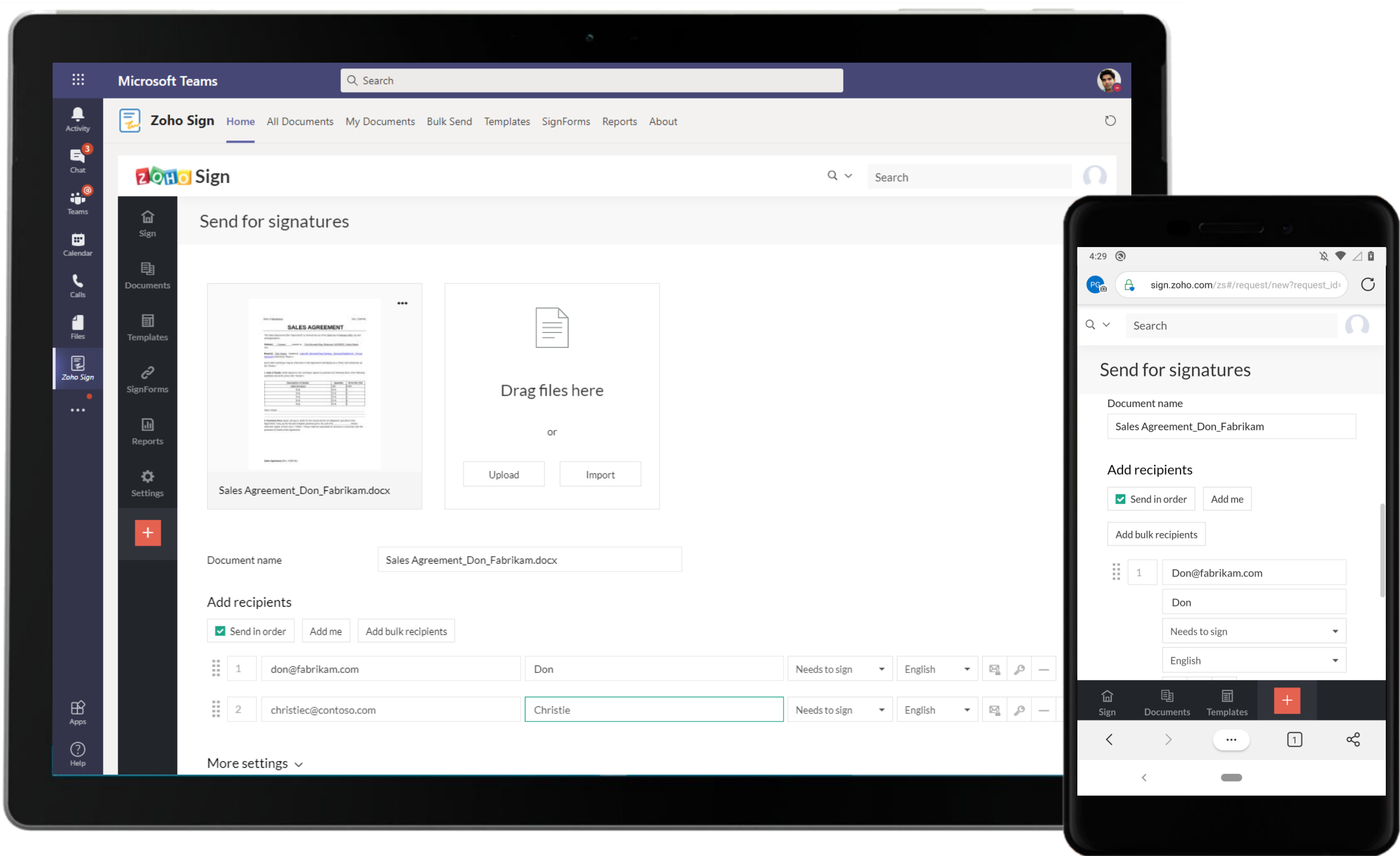
During a meeting, participants can use rich meeting capabilities such as video, screen sharing, file sharing, meeting notes and chat for an engaging, productive and decisive conversation with each other.



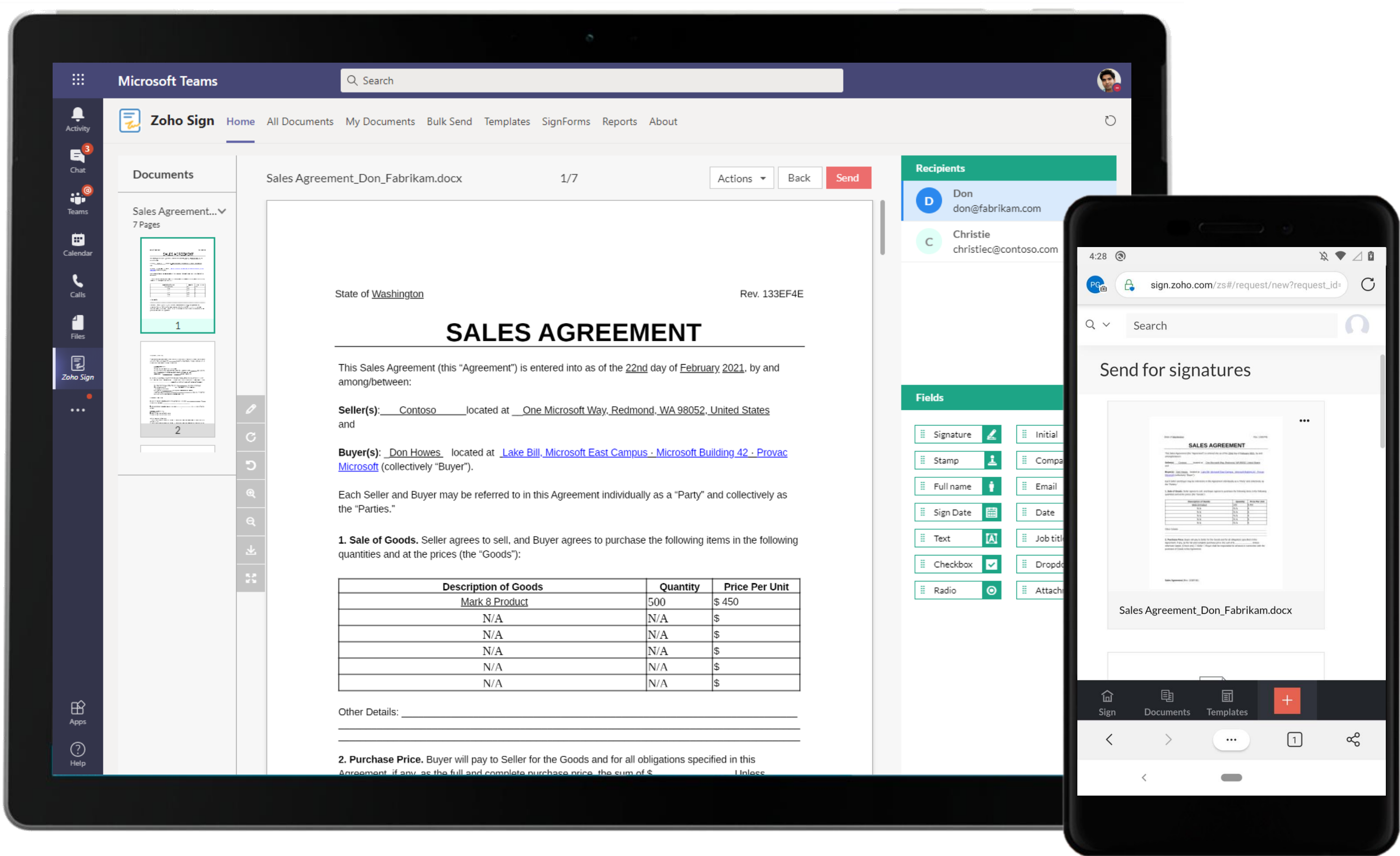
With Decisions app configured in the meeting, the team can refer to the agenda during live meeting and stay on track.



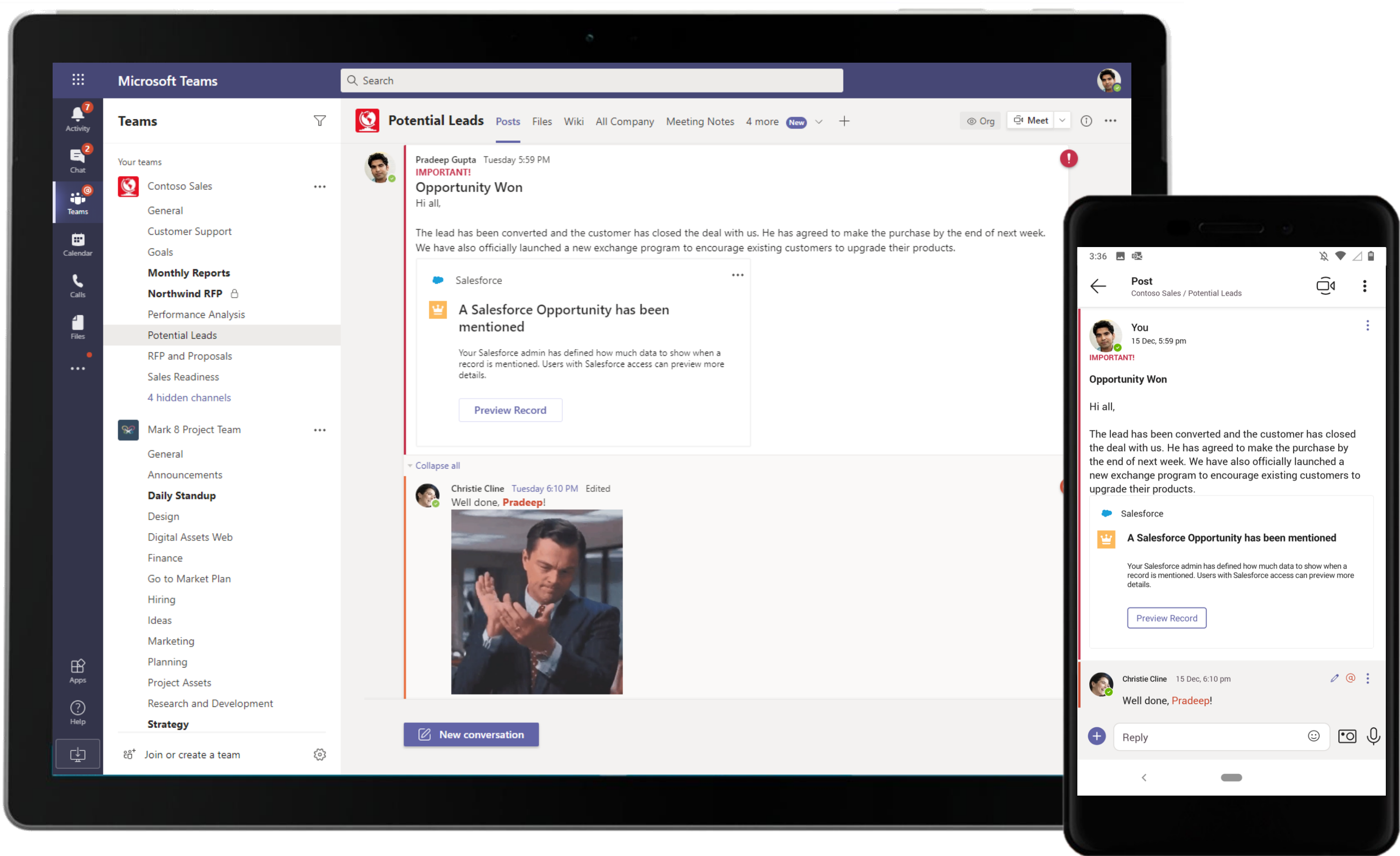
Use the integration of Decisions to record decisions made during the meeting. The Sales Associate records the decisions taken in the meeting using the Decisions app.



Zoho Sign for Microsoft Teams helps you sign, send, and manage legal business documents effortlessly and instantly.



With the integration of Zoho Sign in Microsoft Teams, you can access, send and sign documents instantly, and save a lot of time in your everyday work.



Connectors keep your team current by delivering content and updates from services you use directly into a channel. The Salesforce connector sends periodic updates about activities in the Salesforce account you want to track.



Create High-Quality Sales Reports

Sales Analyst

Scenario Walkthrough

Developing professional sales reports can be time-consuming and costly. You need an easy way to display your data with compelling graphics that accurately represent the data and share it with your team members. See how the Sales Analyst uses Microsoft Teams to collect, create, and manage sales data and reports on a single platform.

- Uses the CT-CRM and ERP Chatbot to find the sales opportunity and shares it in the channel.
- Initiates a 1:1 chat with the Sales Associate for sourcing data.
- Joins the meeting as a presenter and shares screen for presenting the PowerPoint.
- Accepts the Praise given by the Director and responds to the conversation thanking her.

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

- Pursue new opportunities and track their sales using key account management features like pipeline, lead generation, and more with CT – CRM and ERP Chatbot.
- Use Office applications like Excel and PowerPoint and allow quick access to shared reports and information.
- Appreciate high performing team members publicly using Praise.

Which app integrations on Teams made it possible?



PowerPoint



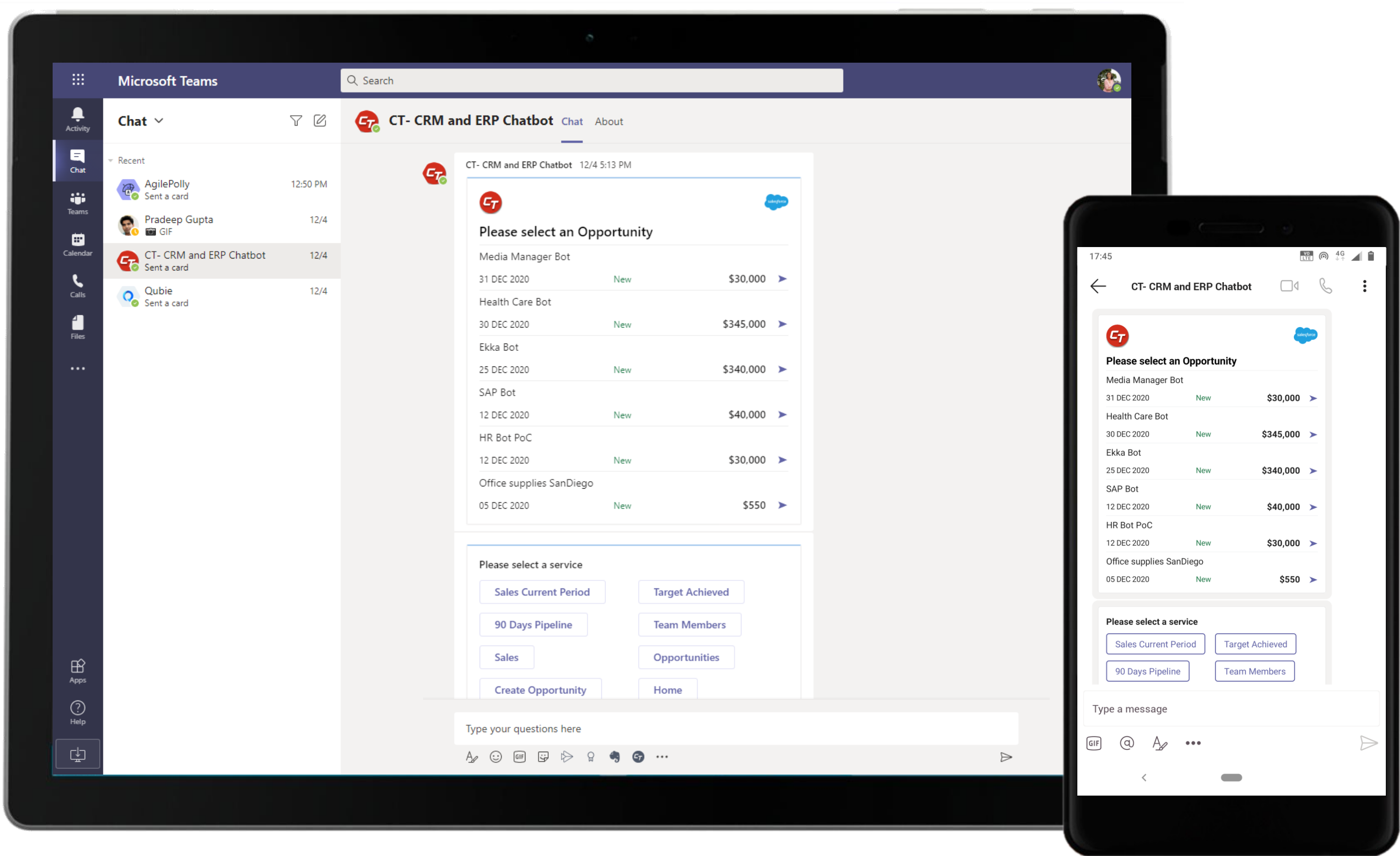
Excel



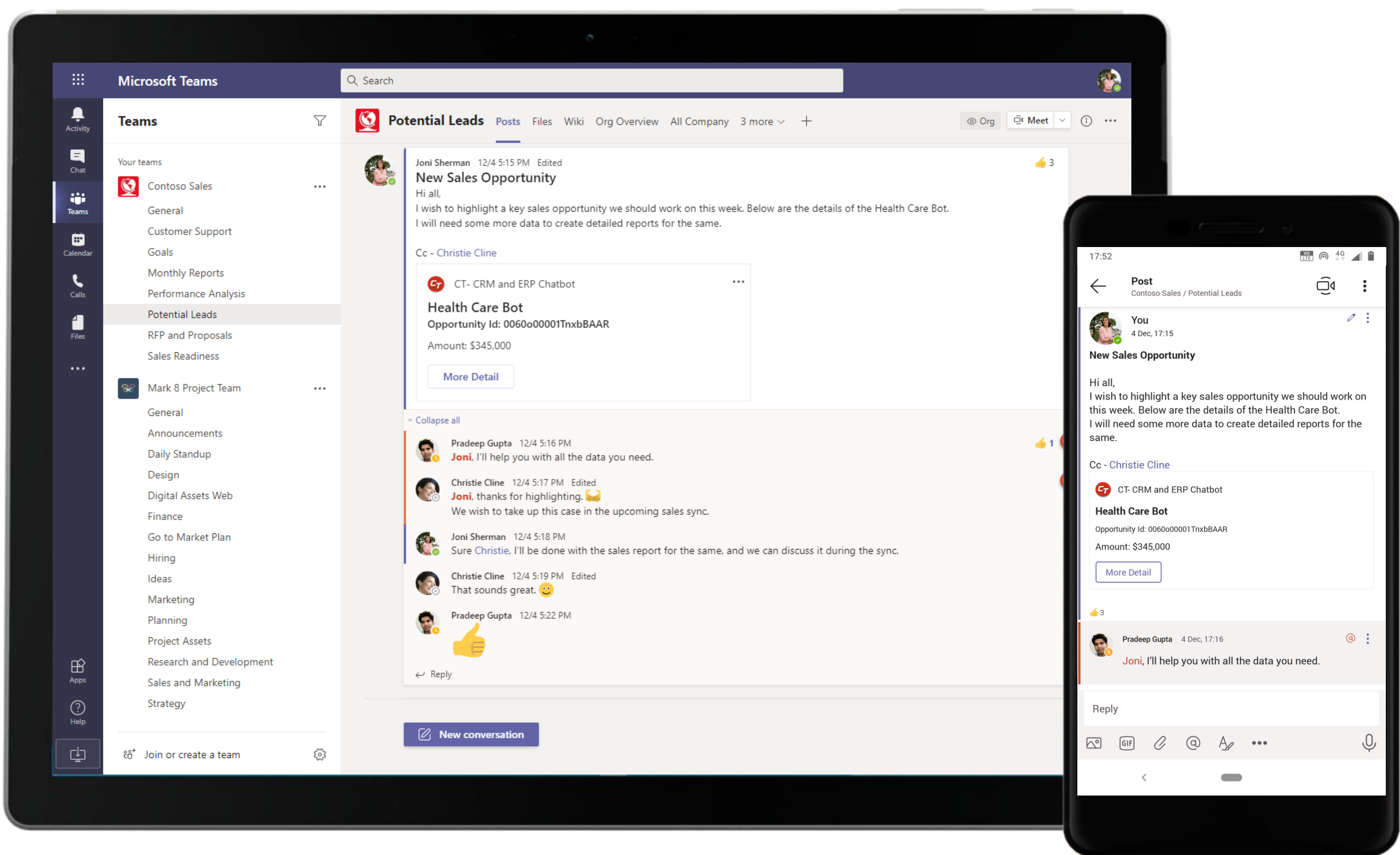
Praise



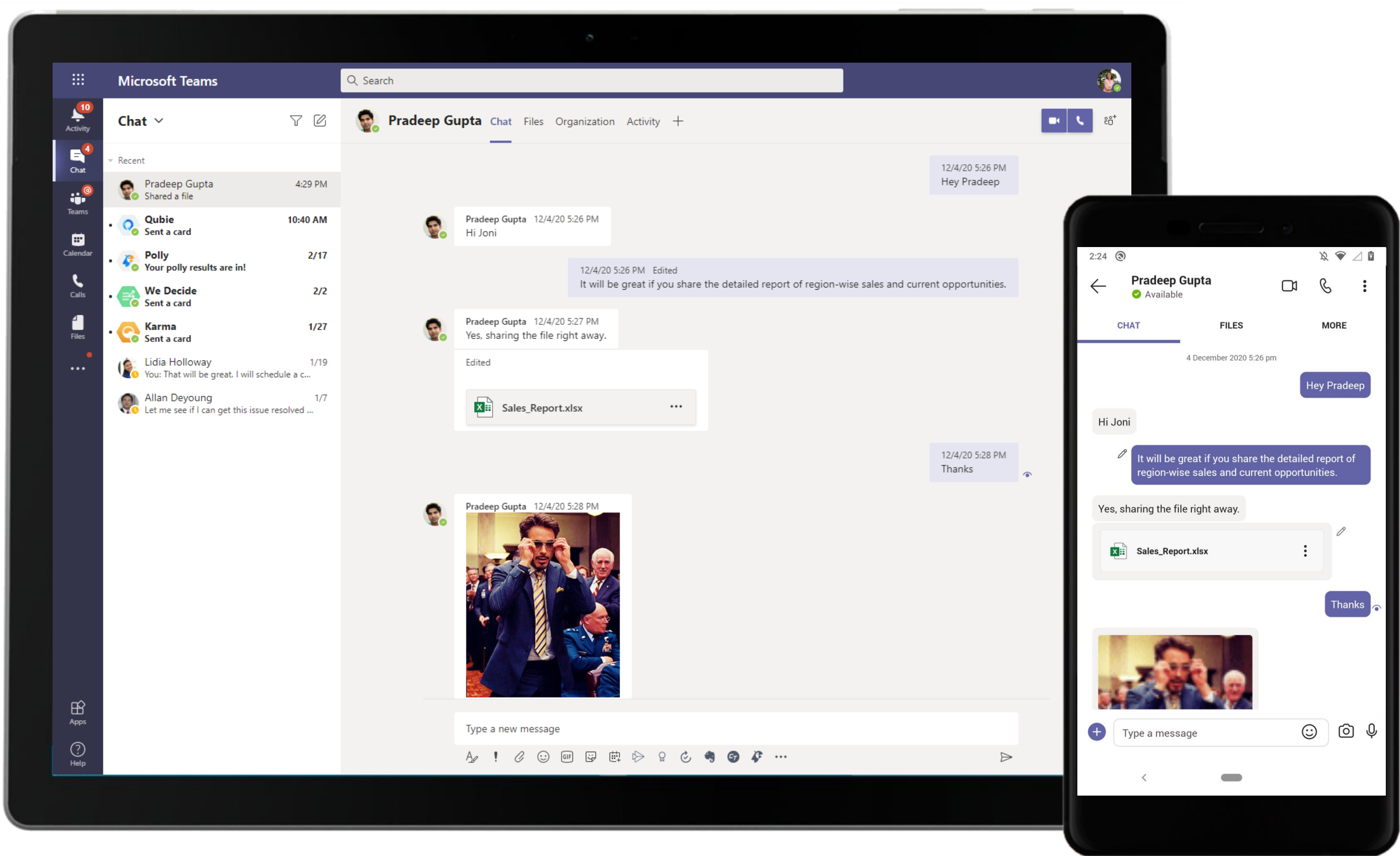
CT- CRM and
ERP Chatbot



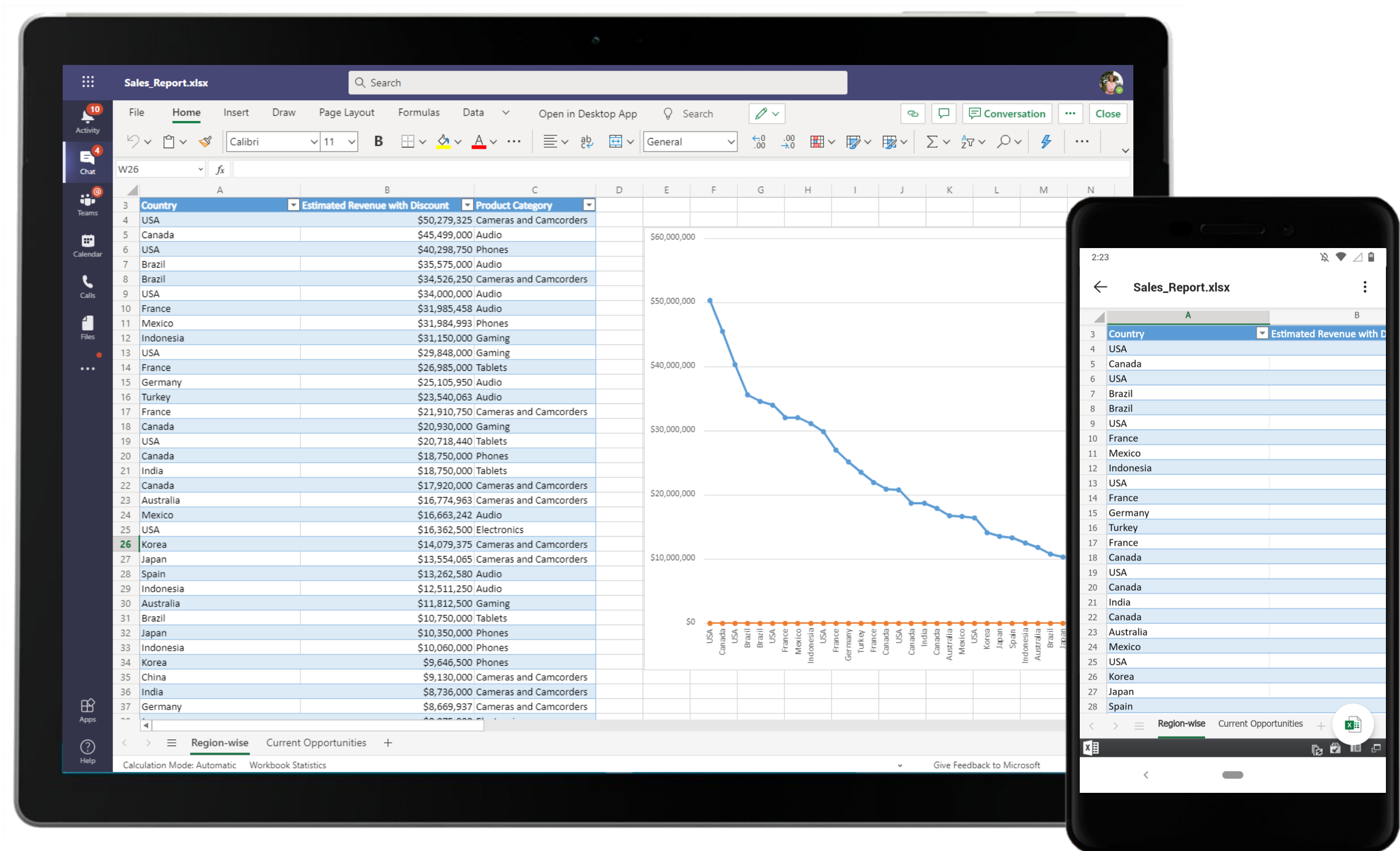
With CT-CRM Chatbot, the Sales Analyst can start with the opportunity pipeline where she can assign tasks and follow up with the activities, right inside Microsoft Teams.



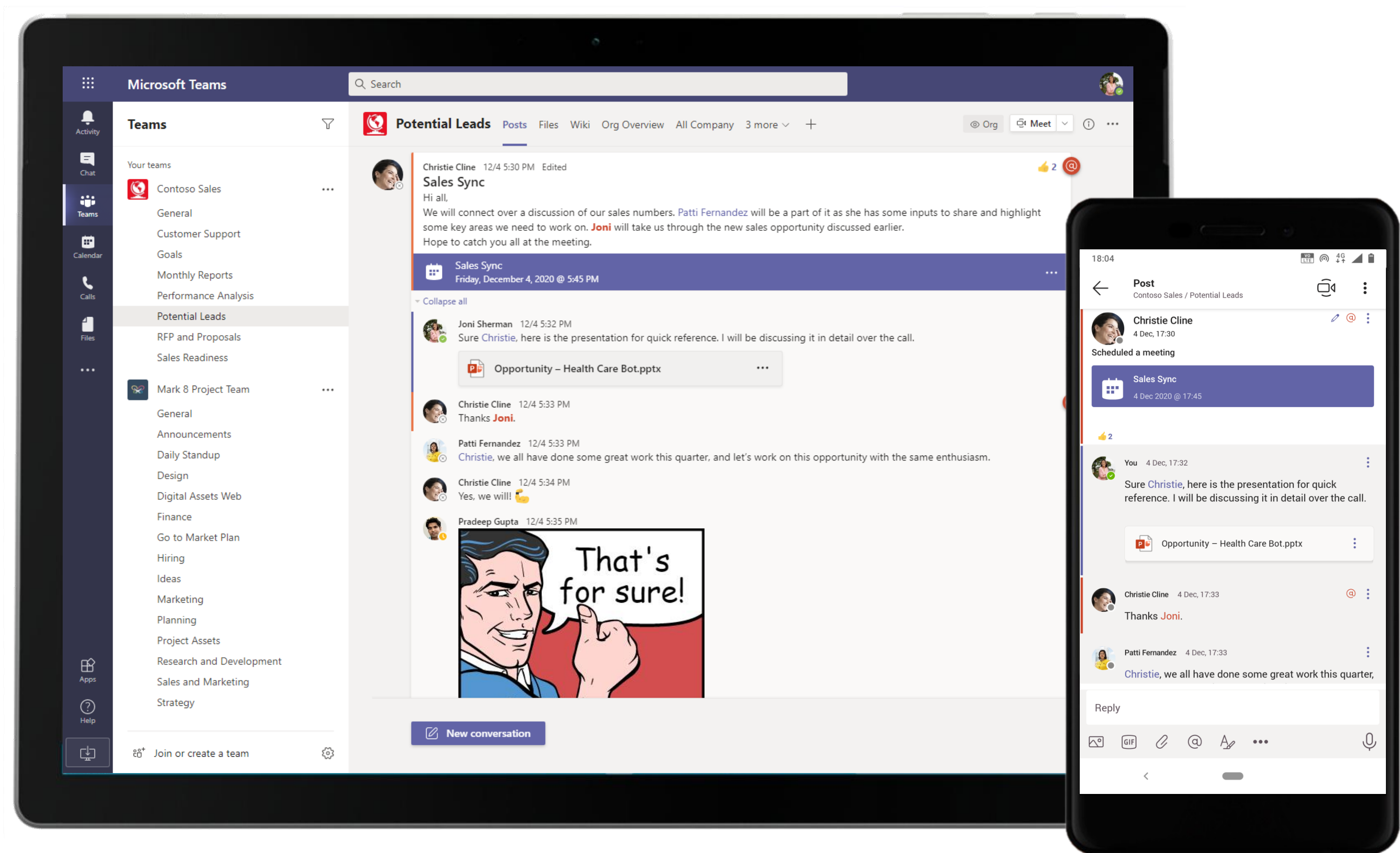
Use channel conversations to relay updates to team members. The Sales Analyst posts a quick update for team members regarding a new sales opportunity using CT-CRM Chatbot.



Quickly reach out to and chat with co-workers. Take conversations offline from channels for 1:1 discussions, just like the conversation here between a Sales Associate and the Sales Analyst.



Break down intricate numbers into visually consumable data with Excel. The Sales Analyst receives sales data in an Excel sheet over a personal 1:1 chat.



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

The image illustrates a Microsoft Teams meeting where a PowerPoint presentation is being shared. The presentation, titled "Opportunity - Health Care Bot...", is displayed on a tablet. It features several slides with charts and maps. The first slide shows "Estimated revenue and commission vs. target revenue" with a bar chart comparing "Estimated Revenue with Discount" (red), "Target Revenue" (orange), and "Estimated Commission with Discount" (blue) across months. The second slide shows "Estimated revenue vs. target revenue" with a bar chart comparing "Estimated Revenue with Discount" (red) and "Target Revenue" (orange). The third slide shows "Estimated revenue by product category" with a treemap chart. The fourth slide shows "Estimated revenue by country and product category" with a world map. The fifth slide shows "Estimated revenue with by account type" with a bar chart. The sixth slide shows "Estimated revenue by country and product category" with a world map. The presentation is titled "Opportunity - Health Care Bot..." and is being presented by "Joni S". The Teams interface includes a sidebar with navigation options like Activity, Chat, Teams, Calendar, Calls, and Files, and a bottom bar with a "Meeting now" button and a "Help" icon.

Estimated revenue and commission vs. target revenue

Estimated revenue vs. target revenue

Estimated revenue by product category

Estimated revenue by country and product category

Estimated revenue with by account type

Estimated revenue by country and product category

Meeting now 16:47

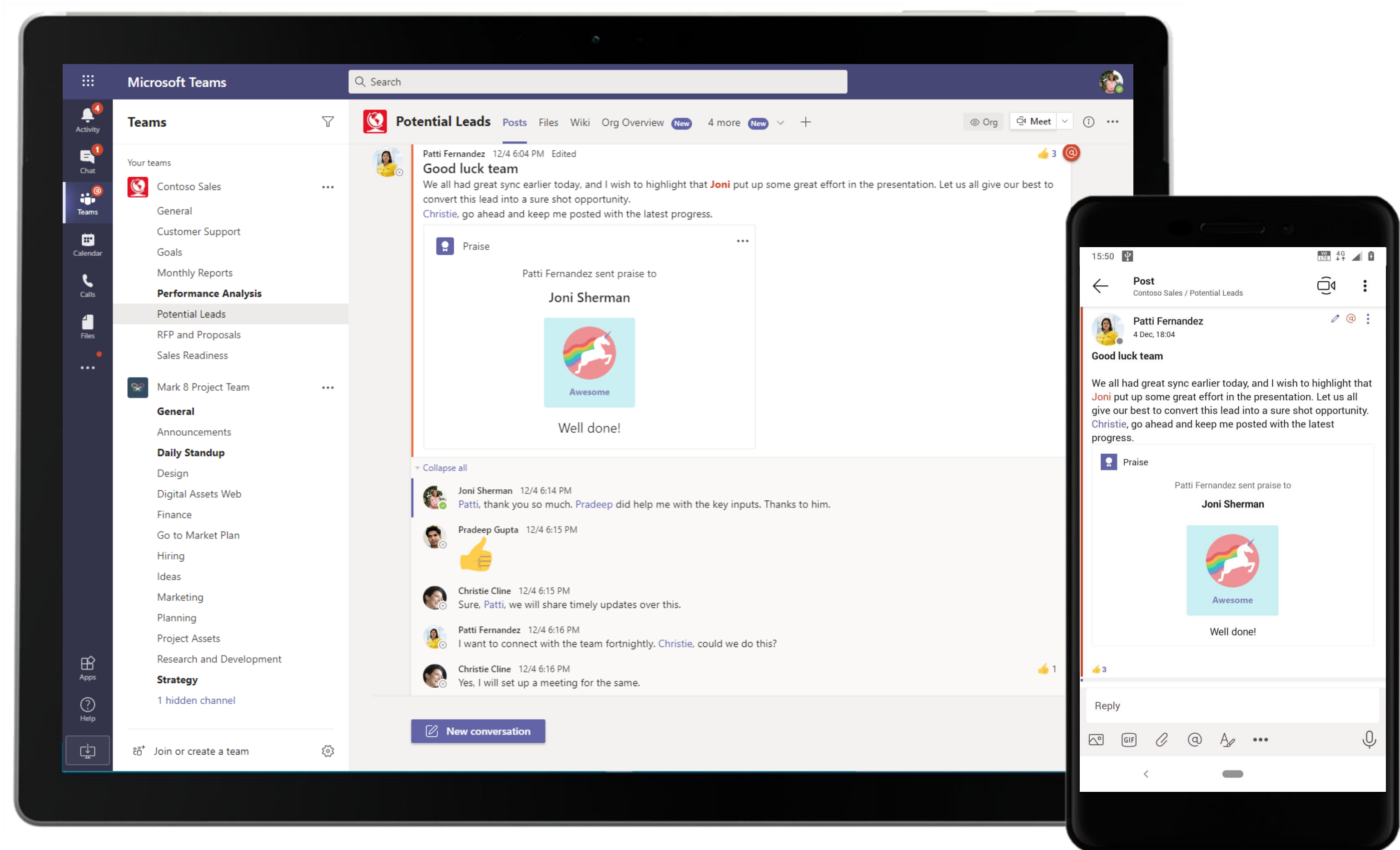
Slide 3 of 8 English (U.S.)

Help Improve Office Notes

Sales Sync 07:58 3 attendees

Joni S

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



Send acclaim to your employees and coworkers with Praise in Microsoft Teams. Deliver in a chat, or for wider recognition, send it in a channel conversation. The Director compliments the Sales Analyst using Praise.



Preparing for Monthly Review

Sales Manager

Scenario Walkthrough

Contoso drives sales efforts by continually analyzing the results of previous endeavors and tracking sales outcomes. See how the Sales Manager syncs up with the Sales team on Microsoft Teams for her monthly review.

- Sends an invite to the team members to meet for a monthly review.
- Adds a Power BI tab containing the sales performance for the month.
- Asks the Account Executive to share the Excel containing the sales numbers.
- Gets into a group chat with the Account Executive and Customer Relationship Manager to discuss customized monthly newsletters.

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

- Enable multi-channel communication through 1:1 chat, channel conversations, and video/audio conferences with team members.
- Facilitate data-driven decisions informed by visualizations and scoring in Power BI for Microsoft Teams.
- Build reports and documents online in the cloud with Excel.

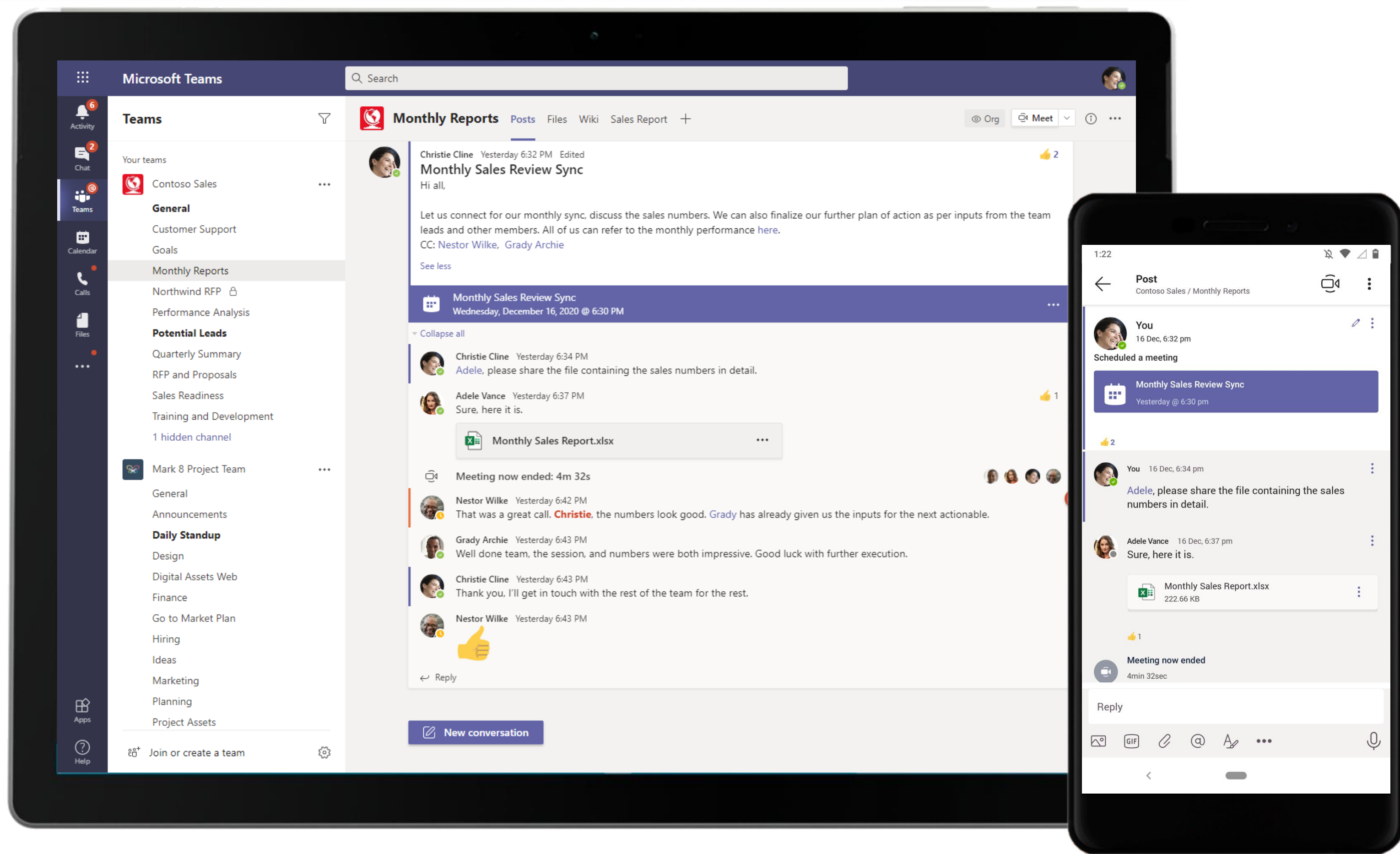
Which app integrations on Teams made it possible?



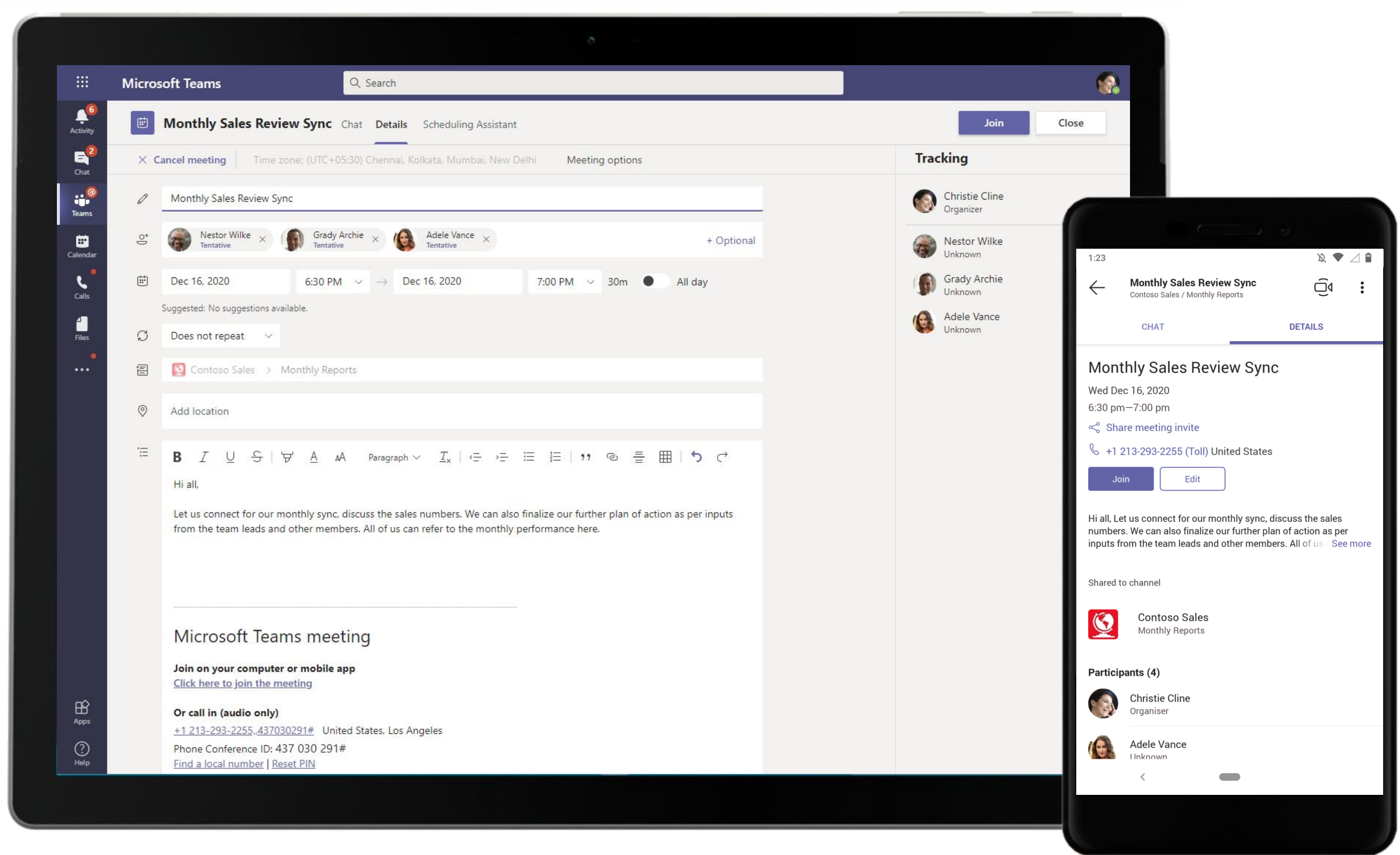
Excel



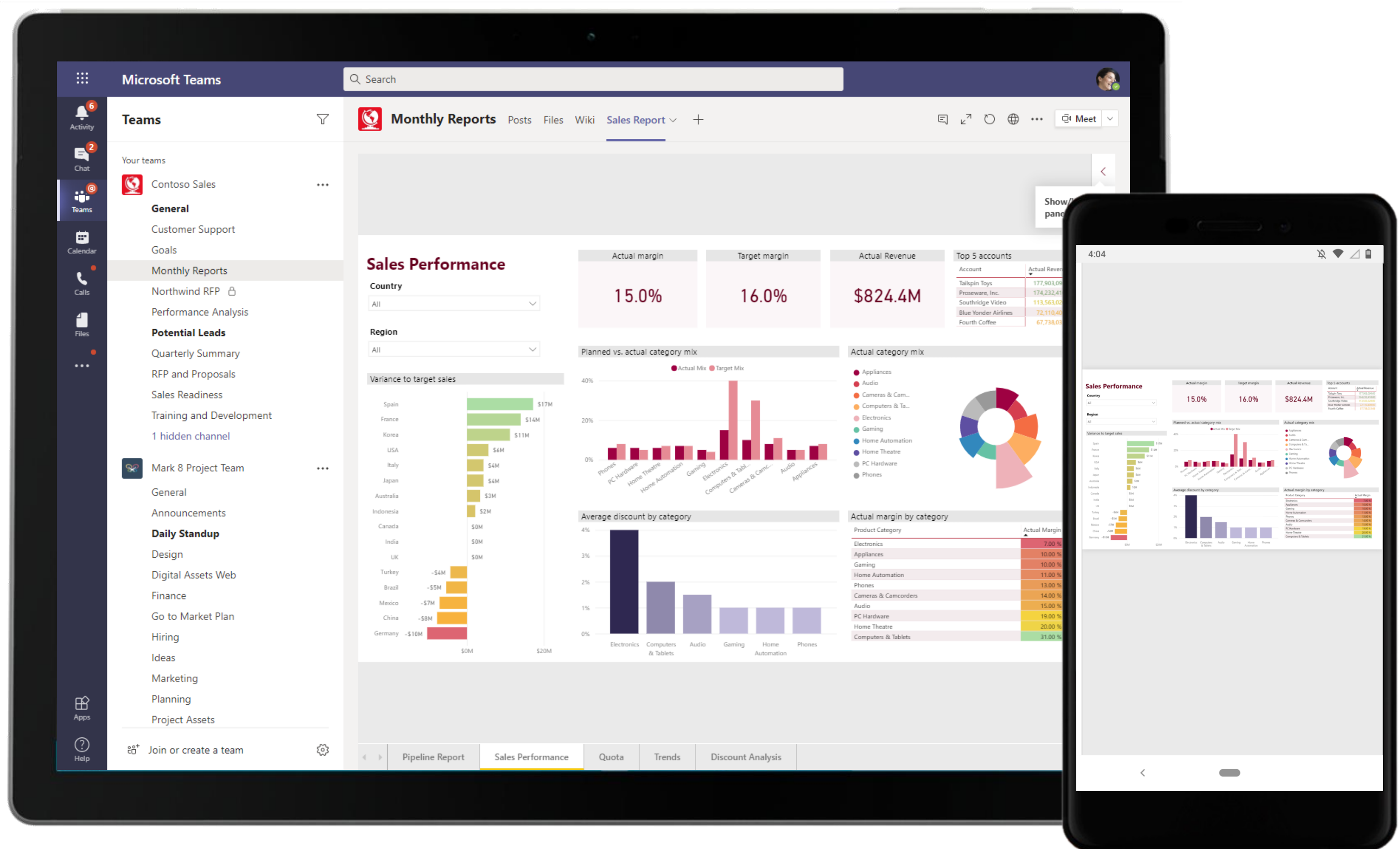
Power BI



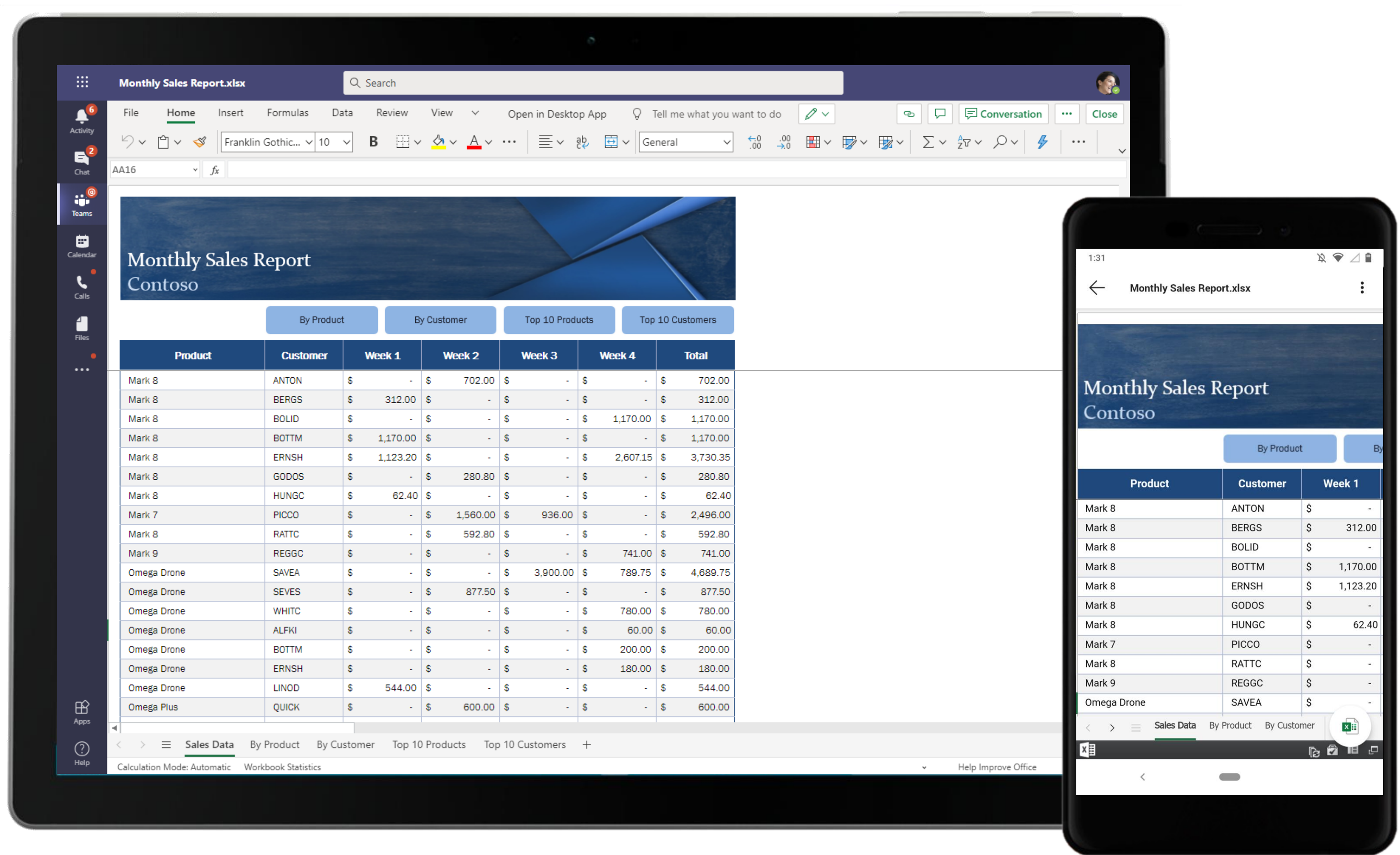
An exclusive channel for members of a team who collaborate regularly helps maintain a history of past communications while keeping the newest conversations and files accessible.



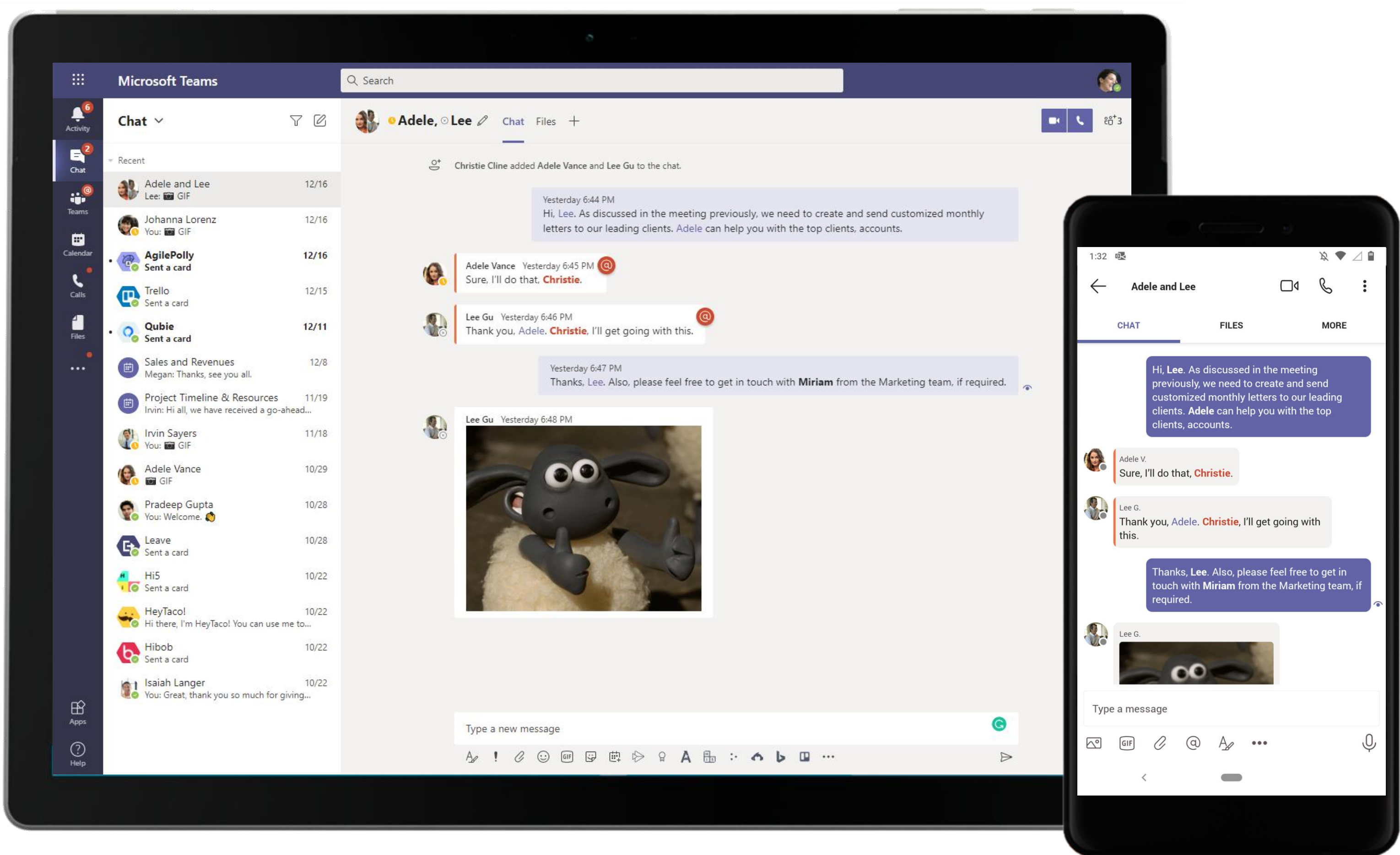
With Microsoft Teams, the Sales Manager can schedule meetings without difficulty and find the best available times for invitees through the native scheduling calendar.



Build dynamic data visualizations, measure metrics, and track analytics through Power BI within Teams. The Sales Manager can dive into this wealth of analytical data shared using Power BI.



Create impactful summaries of crucial data with Excel right within Microsoft Teams. The Account Executive uses Excel to build and present data to the Sales Manager.



Use a private one-on-one chat or a group chat for conversations that don't require the entire team. The Account Executive provides a quick update over chat after the review meet.



Work Together

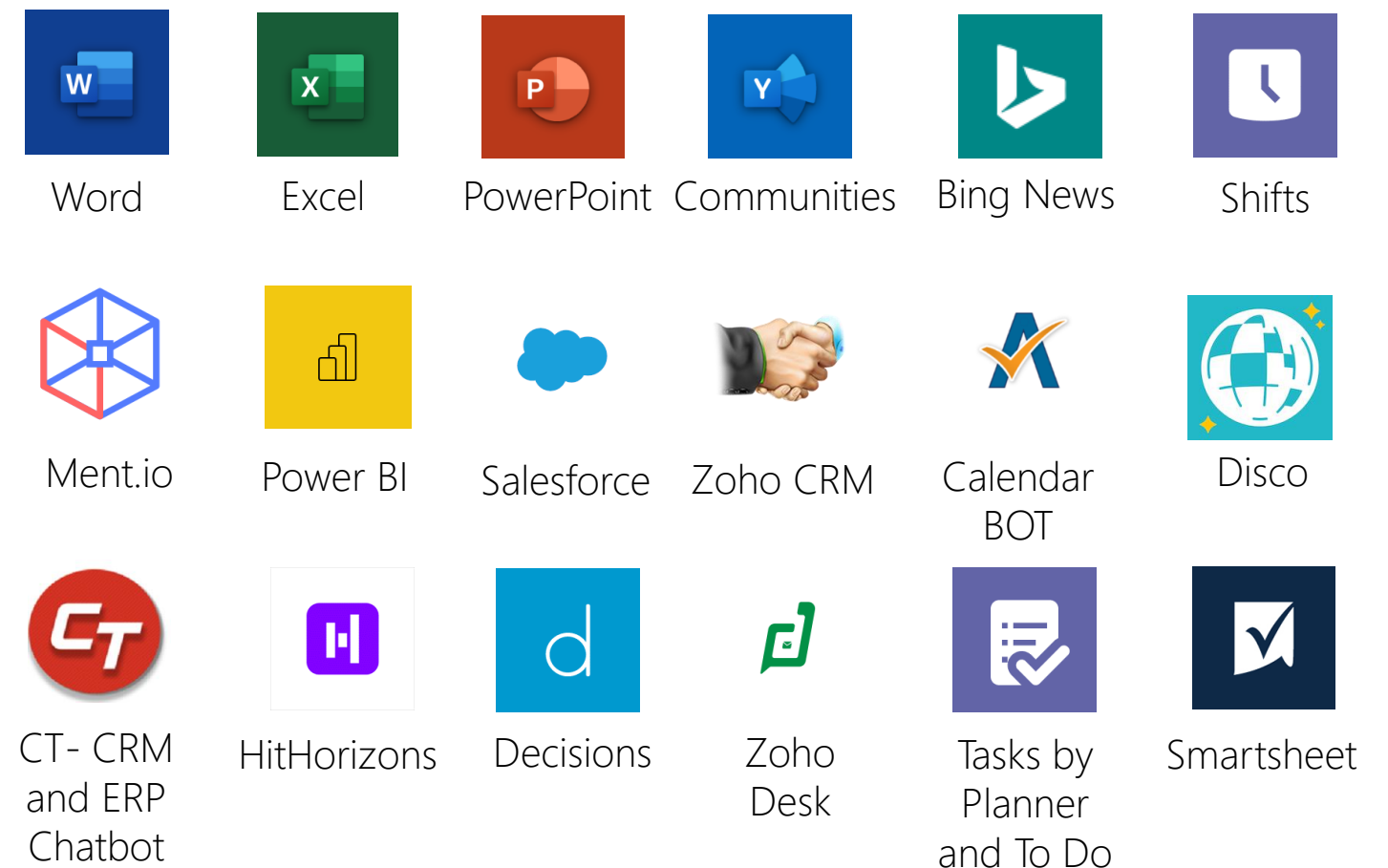
Check out how the Sales team can use Microsoft Teams to keep your business running efficiently and address unexpected situations with confidence.

Sales Superpowers in Teams

Capabilities and features used...

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

Apps that enable an immersive experience in Teams



Meet the Business Decision Makers

Sales



Sales Manager

"As sales leaders, we have to set the bar high for ourselves as well as our teams."

- Recruit and train new sales staff, assign specific tasks to other sales staff, and monitor the team's sales performance
- Solve customer complaints and answer customers' questions
- Provide sales staff with constructive feedback



Assistant Sales Manager

"Always do your best. What you plant now, you will harvest later."

- Continually meeting or exceeding sales quotas
- Supervising and guiding the sales team as well as providing incentives to motivate staff to achieve sales targets
- Monitoring the performance of the sales team



Collaborate To Close Deals Faster

Assistant Sales Manager

Scenario Walkthrough

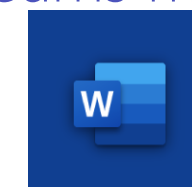
Due to a surge in remote work, collaboration has turned into all digital and every activity is done over the internet. Microsoft Teams enables you to efficiently work on an account, set context, share, and develop drafts of important documents. Team members can chat, review and co-author files, and have video calls. See how the Assistant Sales Manager coordinates with her team members to get the groundwork done for client interaction over Microsoft Teams.

- Sets up a team meeting and invites the Sales team members for a discussion on an account.
- Shares the account details directly in the channel using Zoho CRM.
- Asks the Sales Associate to share a Word document in the channel for reference.
- Utilizes Tasks by Planner and To Do to assign tasks to the team members.
- Acknowledges the PowerPoint file shared by the Sales Associate.
- Asks the Business Development Manager to make a few additions in the PowerPoint.

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

- Share vital CRM records and stay updated on key sales metrics with Zoho CRM.
- Co-author documents, presentations through established channels and collaborate using Office applications like Word and PowerPoint.
- Assign, track, and communicate tasks and milestones without having to switch apps with Tasks by Planner and To Do.

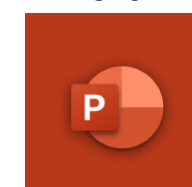
Which app integrations on Teams made it possible?



Word



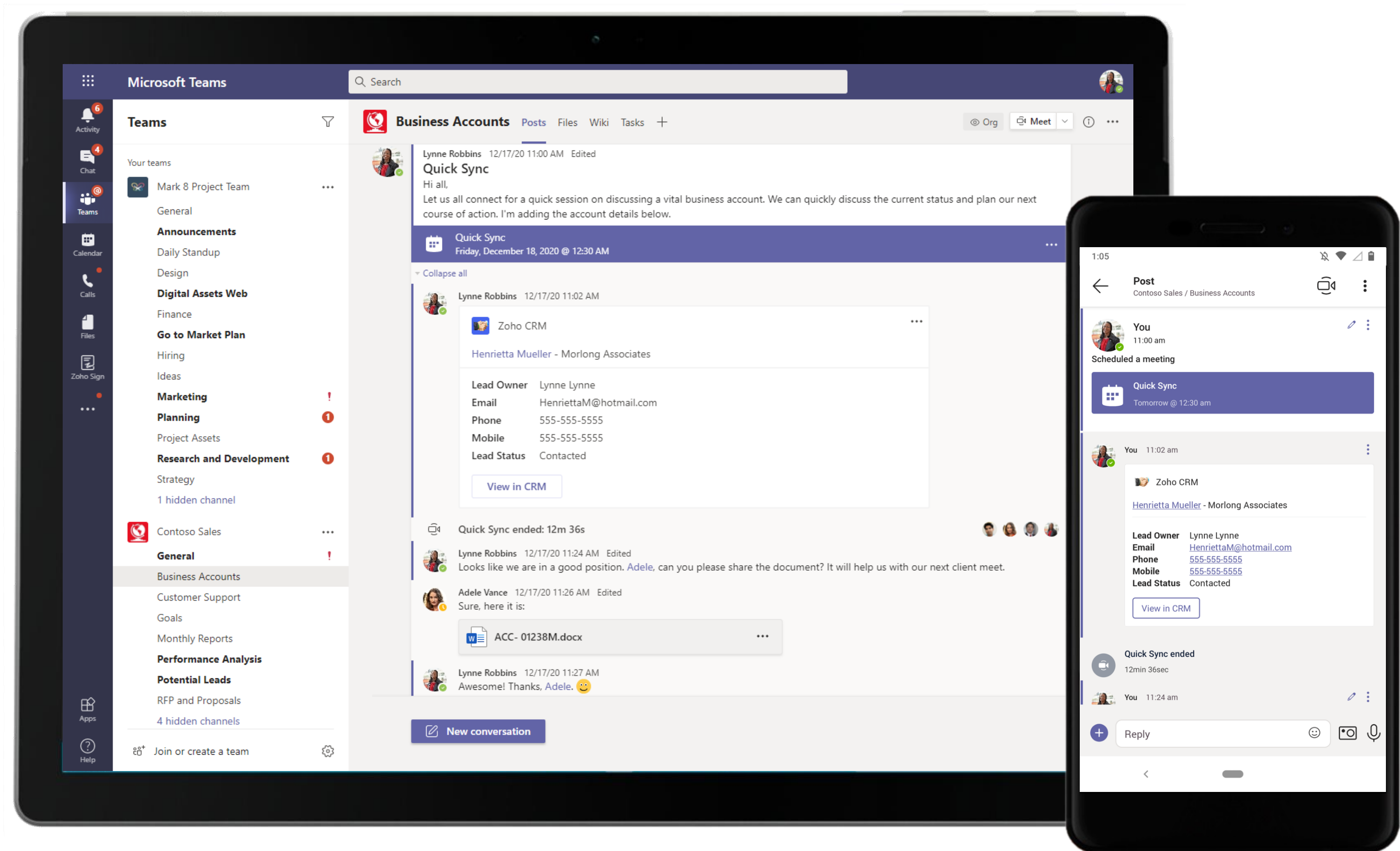
Zoho CRM



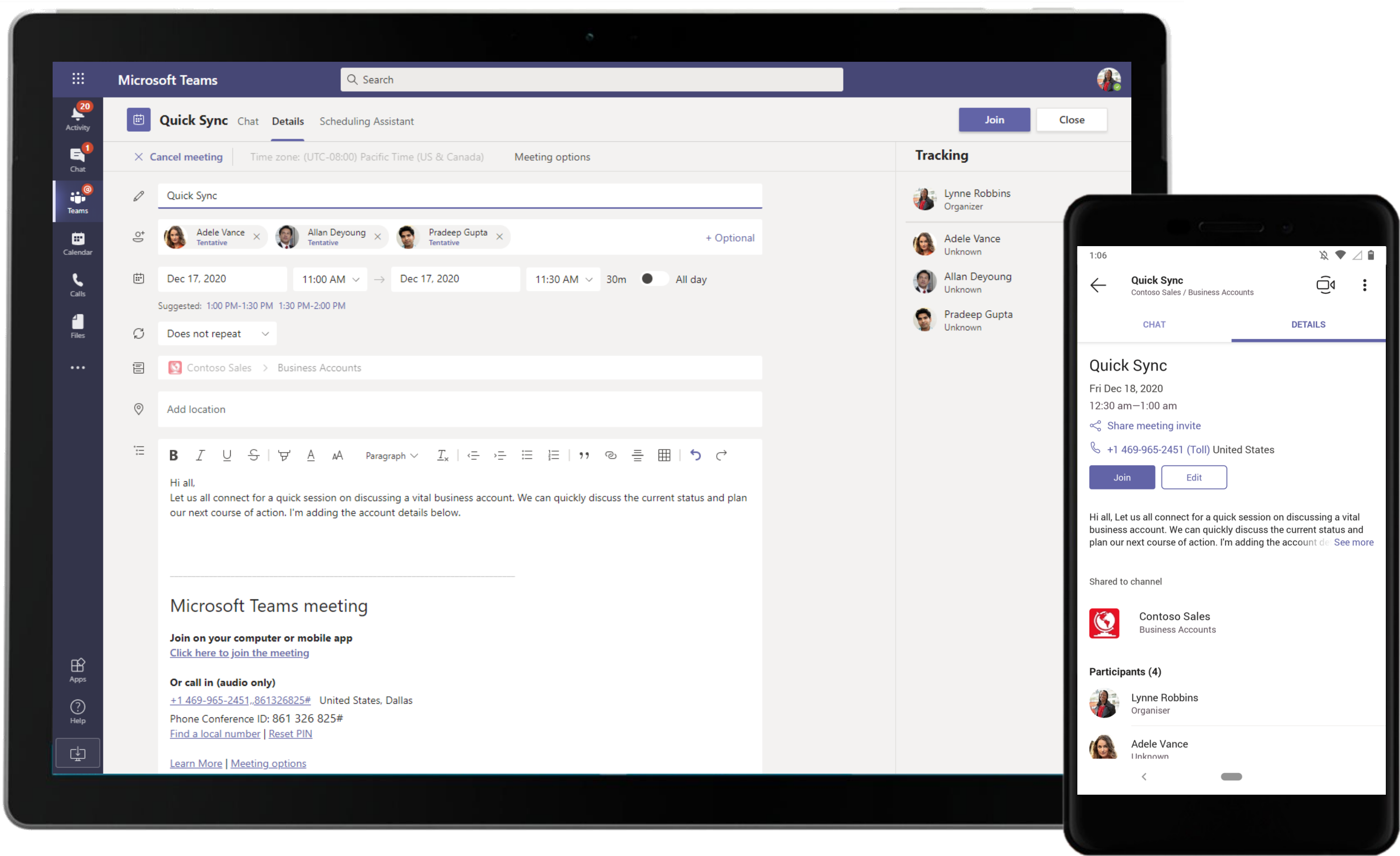
PowerPoint



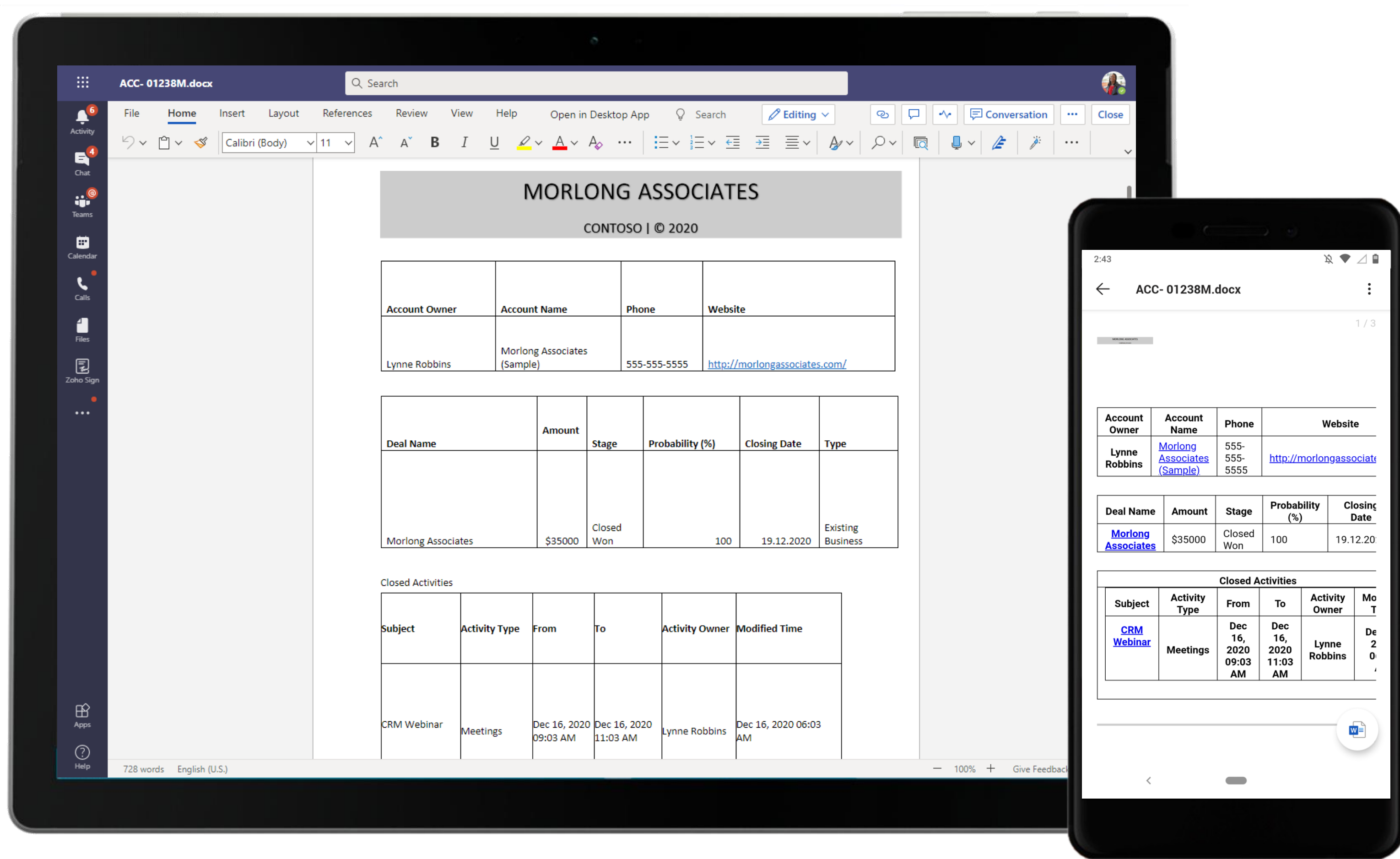
Tasks by Planner
and To Do



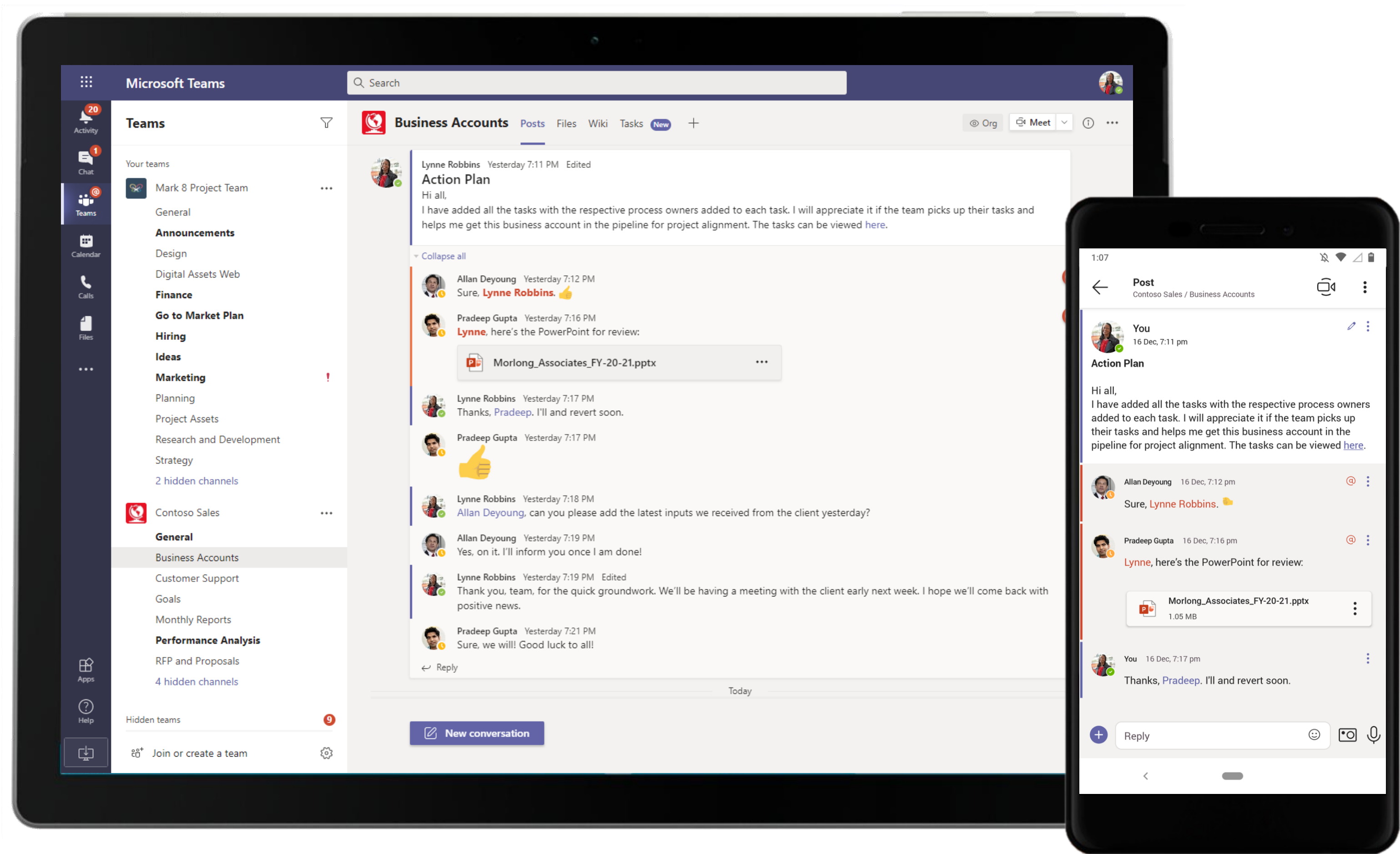
Manage your entire sales process from end to end with pipeline management, process automation, in-depth reporting, fine-tuned security settings and much more with Zoho CRM in Teams. The Assistant Sales Manager shares the contact details in the channel using Zoho CRM.



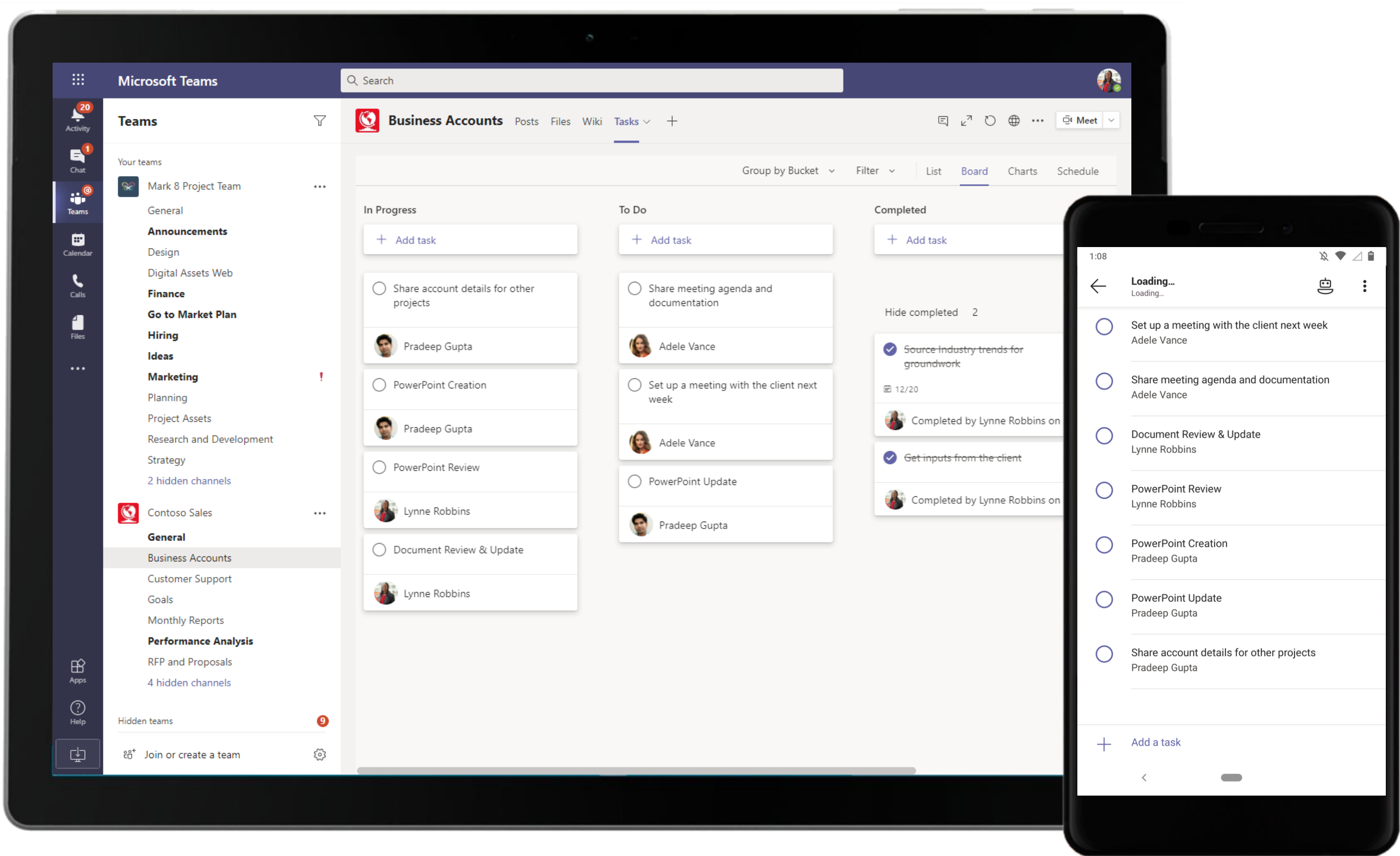
A meeting is set up in the channel to flesh out the idea and a meeting invite is sent to relevant team members and decision makers.



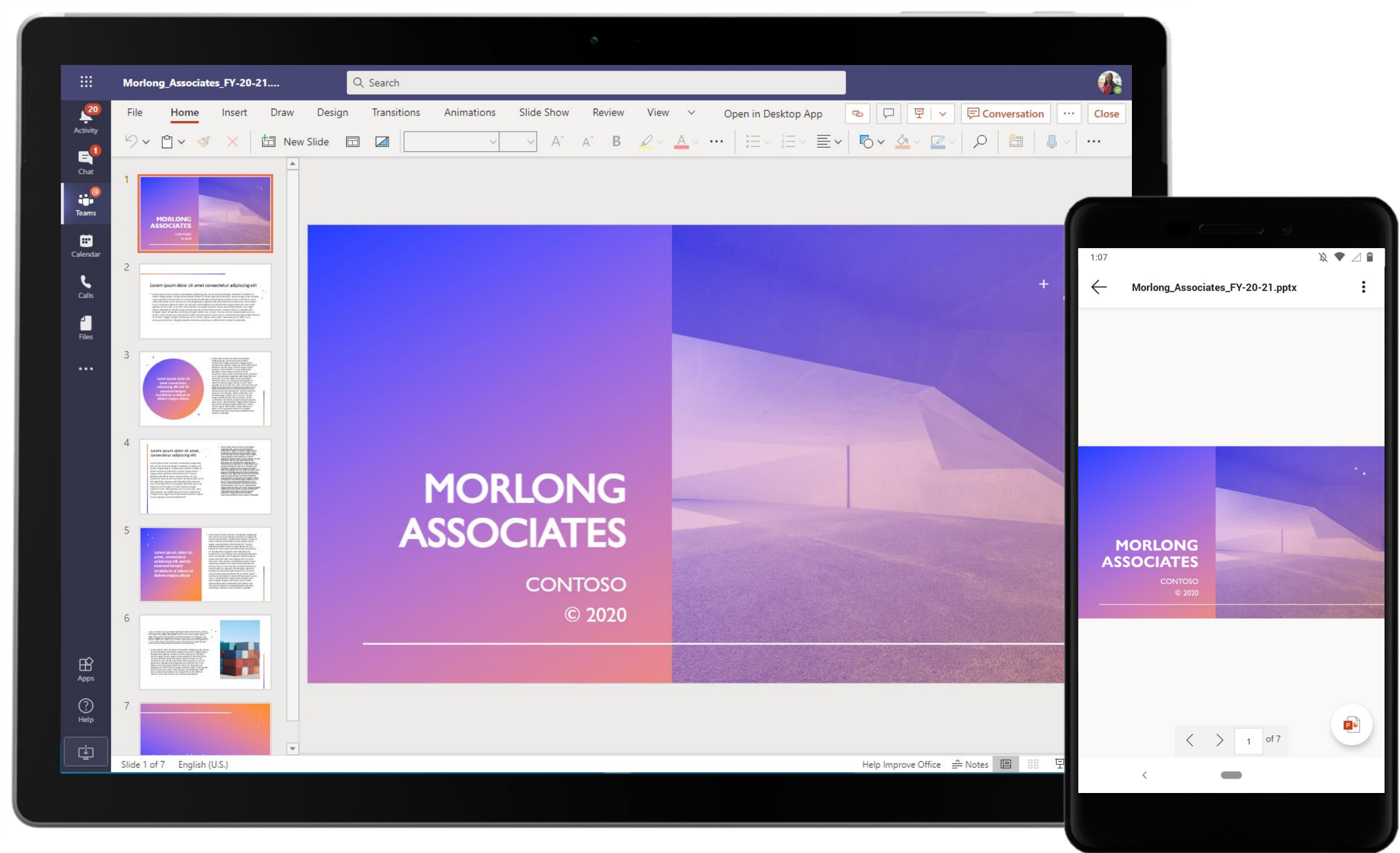
Enjoy powerful document creation and editing with the complete canvas and toolset of Word right inside Teams. Collaborate on team documents easily store them in Files for each channel.



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



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



Utilize PowerPoint to draft and present an effective and easily consumable presentation for the team. The Assistant Sales Manager Strategist shares the presentation in the channel.



Prepare RFPs More Easily as a Team

Sales Manager

Scenario Walkthrough

Preparing a request for proposal (RFP) requires bringing in various resources and references while staying within budget commitments. When the Sales Manager is tasked with putting together the RFP, she immediately creates a new channel with relevant stakeholders across teams to seamlessly collaborate and put together a well-researched proposal. She leverages applications and tools within teams to ensure that everyone is on the same page.

- Responds to the Sales Director who schedules a meeting to share a brief of a new RFP request from Fabrikam.
- Creates a new channel to work on the RFP and gives the finance, IT, and HR team about the project and tasks via channel communications.
- Assigns tasks for each aspect of the RFP to ensure timely completion via Trello.
- Shares the project brief with the team using PDF.
- Configures a Word tab within the channel for everyone to seamlessly work together on completing the RFP.
- Notifies the Director of the completion of the RFP and request for the final sign off via channel communications.

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

- Easily collaborate on RFPs on a single document in the cloud using Word.
- Create, assign and track tasks using Trello in Microsoft Teams.
- Effective channel communication with @mention feature for quick updates.

Which app integrations on Teams made it possible?



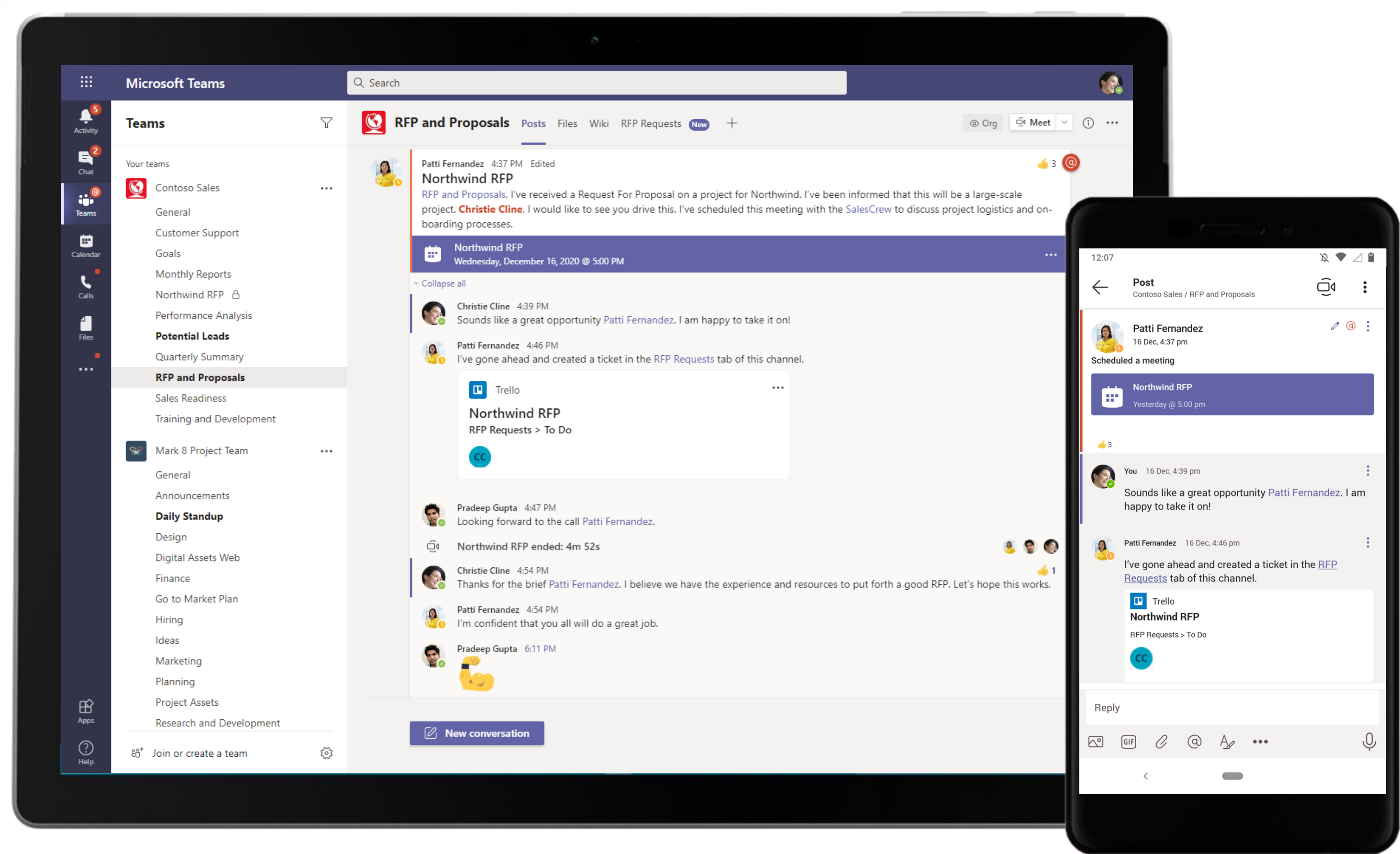
Trello



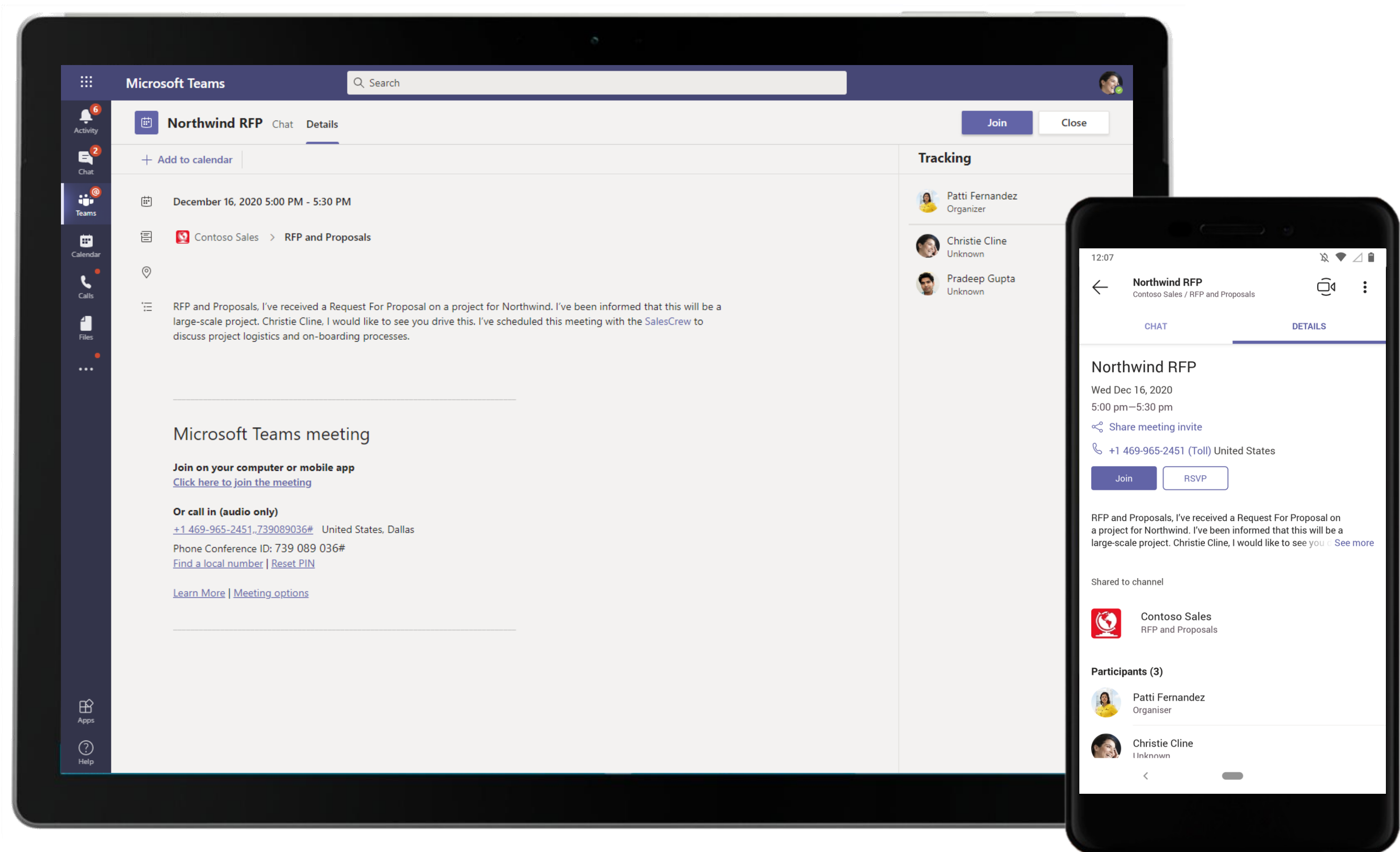
Word



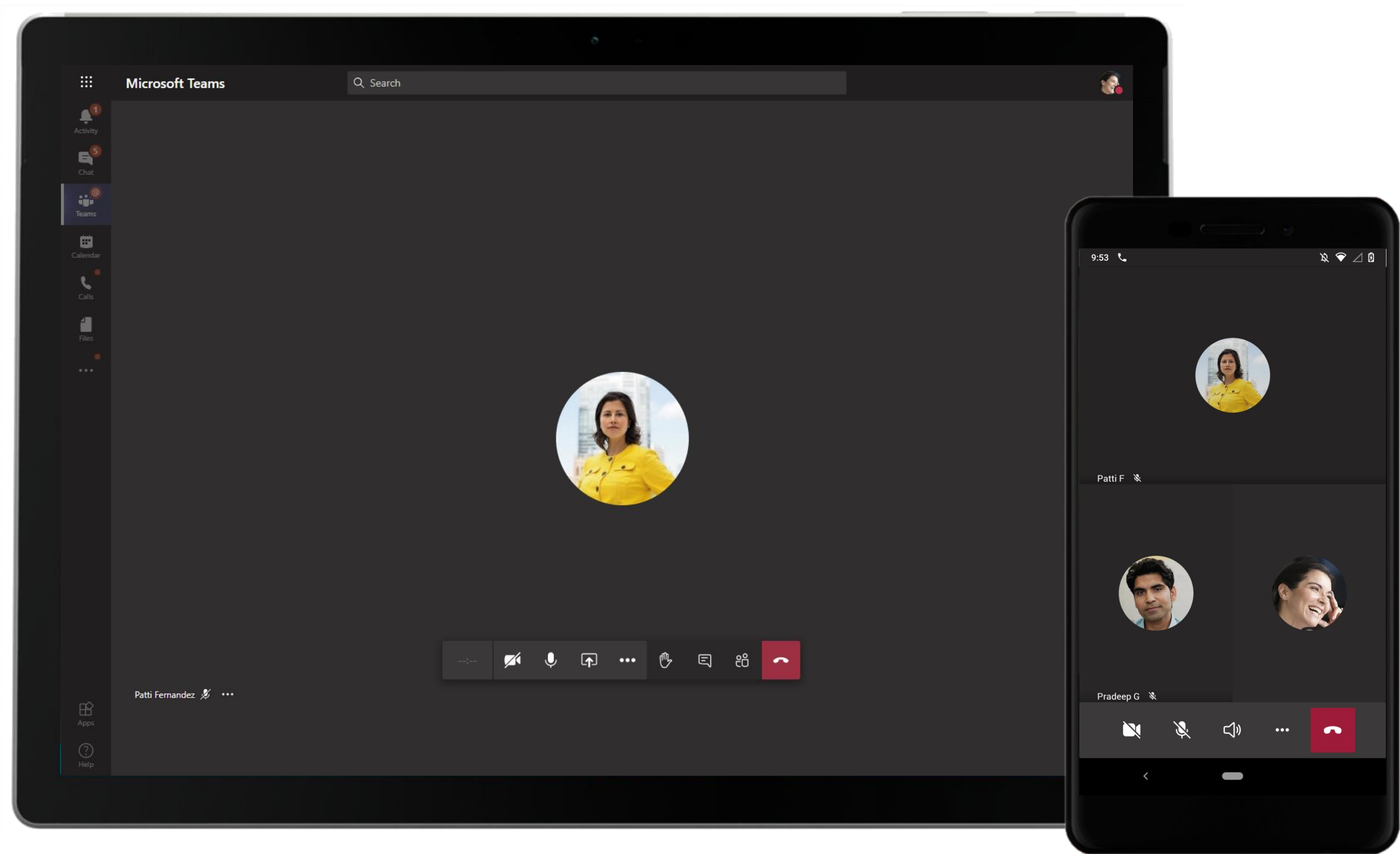
PDF



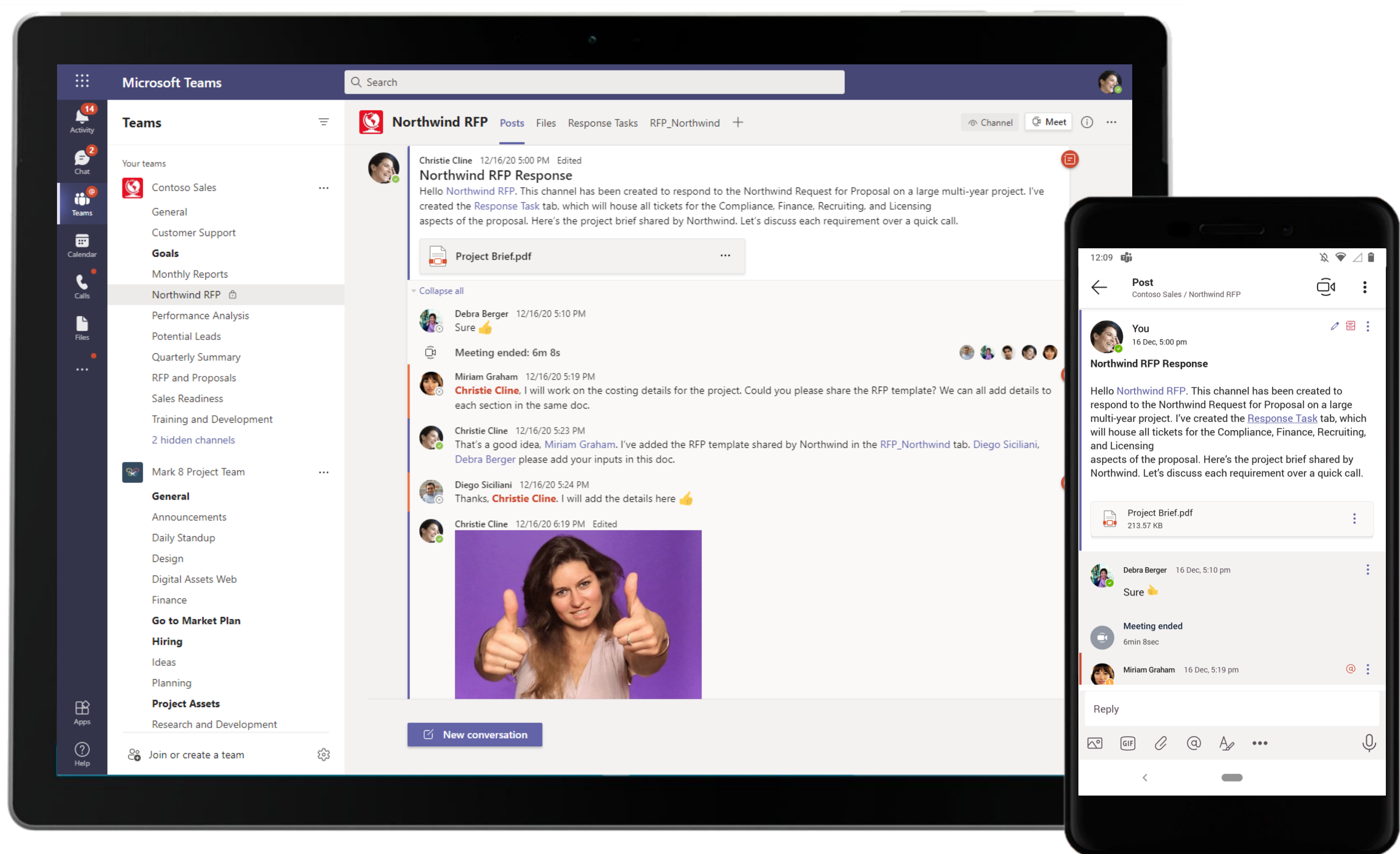
Collaborate with your team through channel communications using @mention to tag required personnel and keep conversations around the topic in a single thread. The Sales Director schedules a meeting to discuss RFP request from a client.



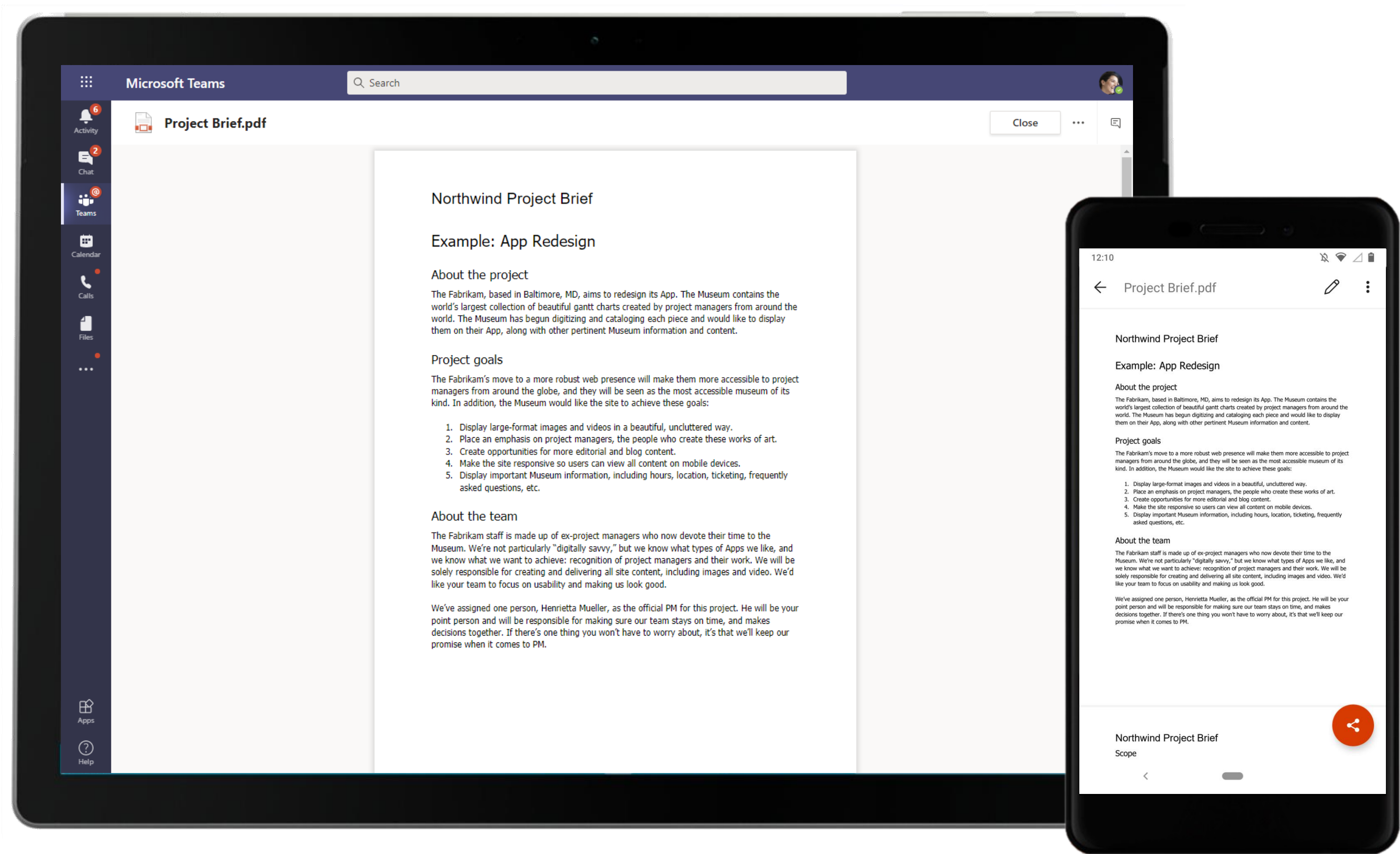
To invite someone to join a meeting, use the Invite people box to search for and invite people when you schedule or edit a meeting. Then, you can use the scheduling assistant to see times when everyone is free.



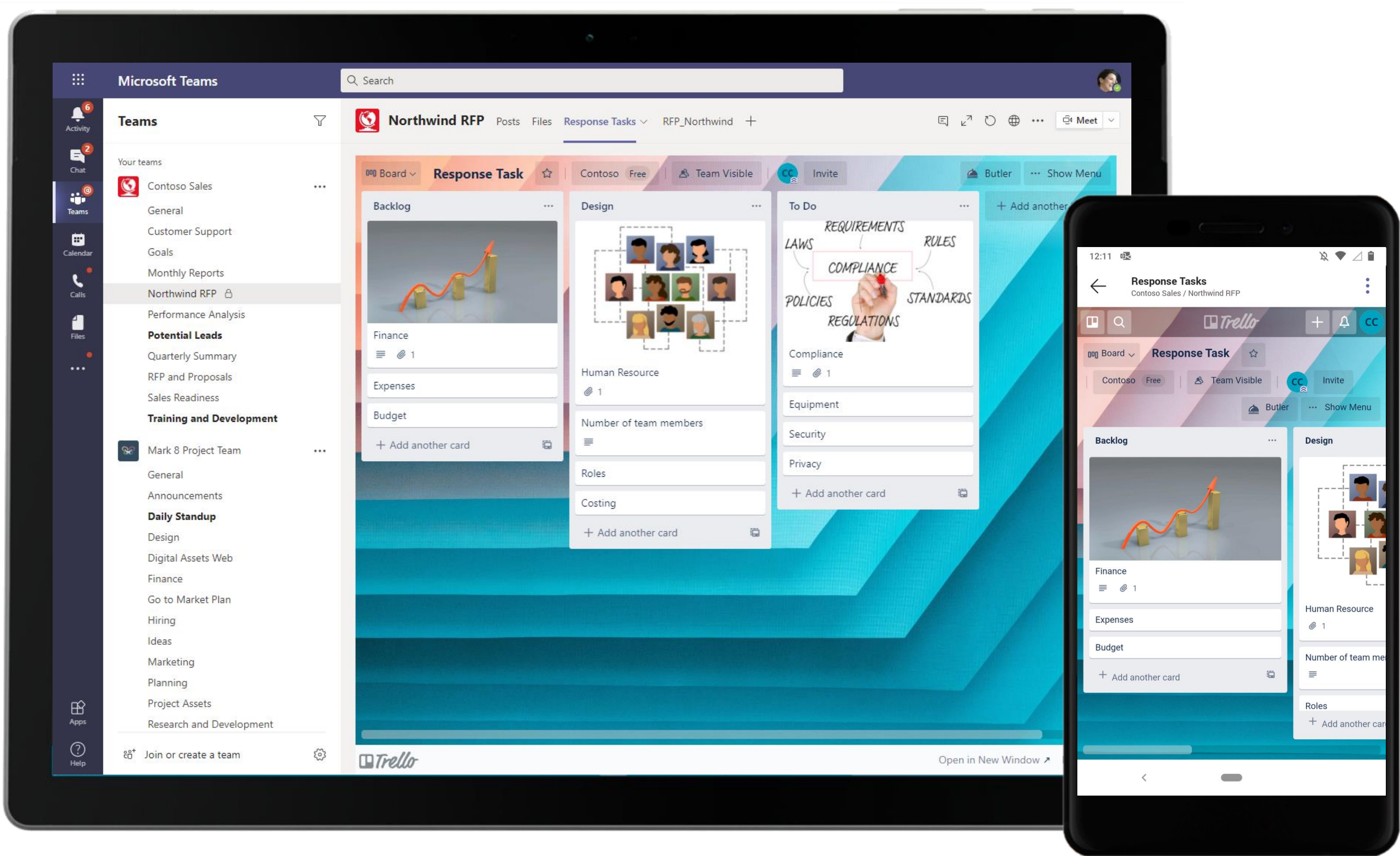
Complete meeting solutions in Teams support screen sharing, recording, video and audio conferencing. Hold calls in Teams with enterprise grade security.



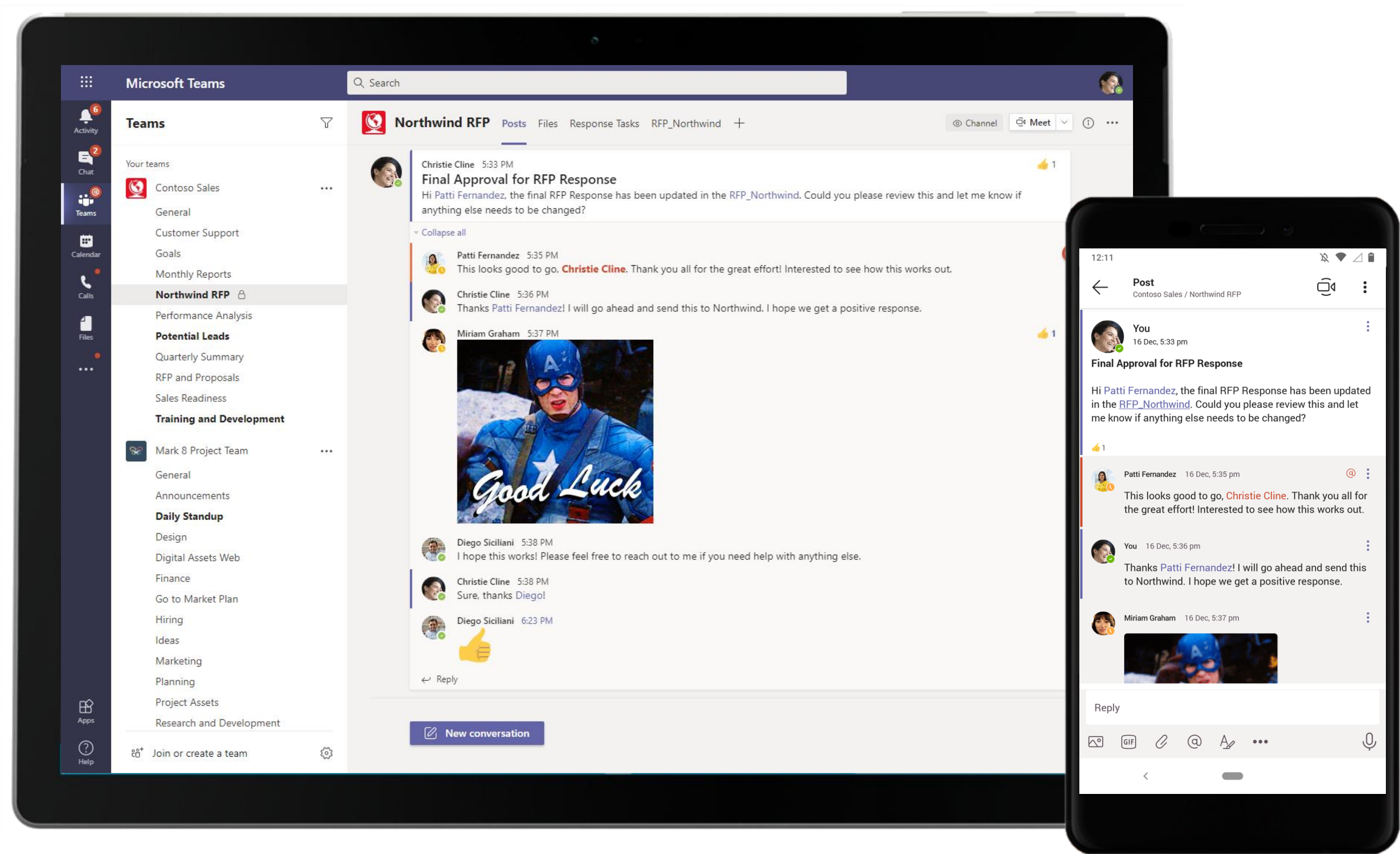
The Sales Manager kicks-off planning over an online meeting and the team keeps conversations and relevant documents all in the meeting thread for easy reference.



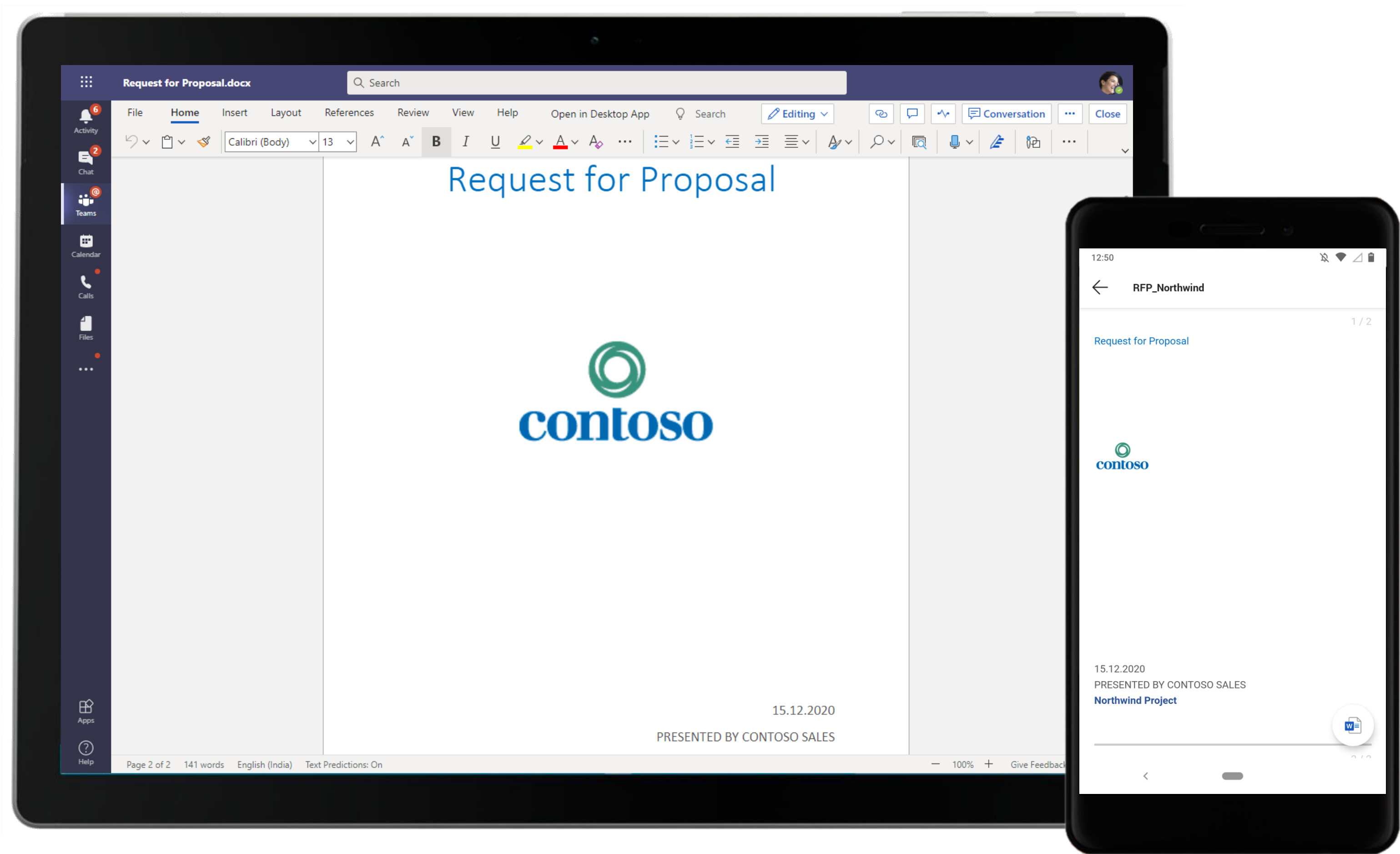
Share PDFs with rich visuals with team members in a channel for easy access. The Sales Manager shares the RFP request in the channel and discusses it with the team.



Trello in Microsoft Teams helps work more collaboratively and get more done.
Trello's boards, lists, and cards enable teams to organize and prioritize projects in a fun, flexible, and rewarding way.



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



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



Collaborating with Finance and Marketing Teams

Sales Manager

Scenario Walkthrough

The Sales team frequently collaborates with the Marketing and Finance teams on various efforts including forecasts and analysis. The Sales Manager is expected to create a sales summary to help the Finance team build their P&L analysis. See how Teams offers her the platform to coordinate and share business-critical information with enterprise security.

- Creates an exclusive private channel for Sales, Marketing, and Finance teams to sync their efforts.
- Receives meeting invite from Finance Manager to discuss the need for a sales summary.
- Configures an Asana tab to create and assign tasks during the meeting and Evernote to capture meeting notes.
- Turns on live captions and a task to the Sales Associate during the meeting via Asana.
- Reaches out to the Sales Associate via 1:1 chat to bring her up to speed.
- Views the Sales Summary shared by the Sales Associate within the channel using Smartsheet.

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

- Use a dedicated team to prepare and collaborate on a plan of action for business-critical tasks.
- Seamlessly capture and share notes with Evernote for Microsoft Teams.
- Collaborate over revenue statistics and projections easily using Smartsheet.
- Asana in meetings helps you create, assign and discuss tasks during a call.

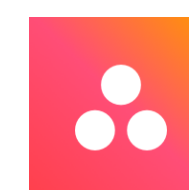
Which app integrations on Teams made it possible?



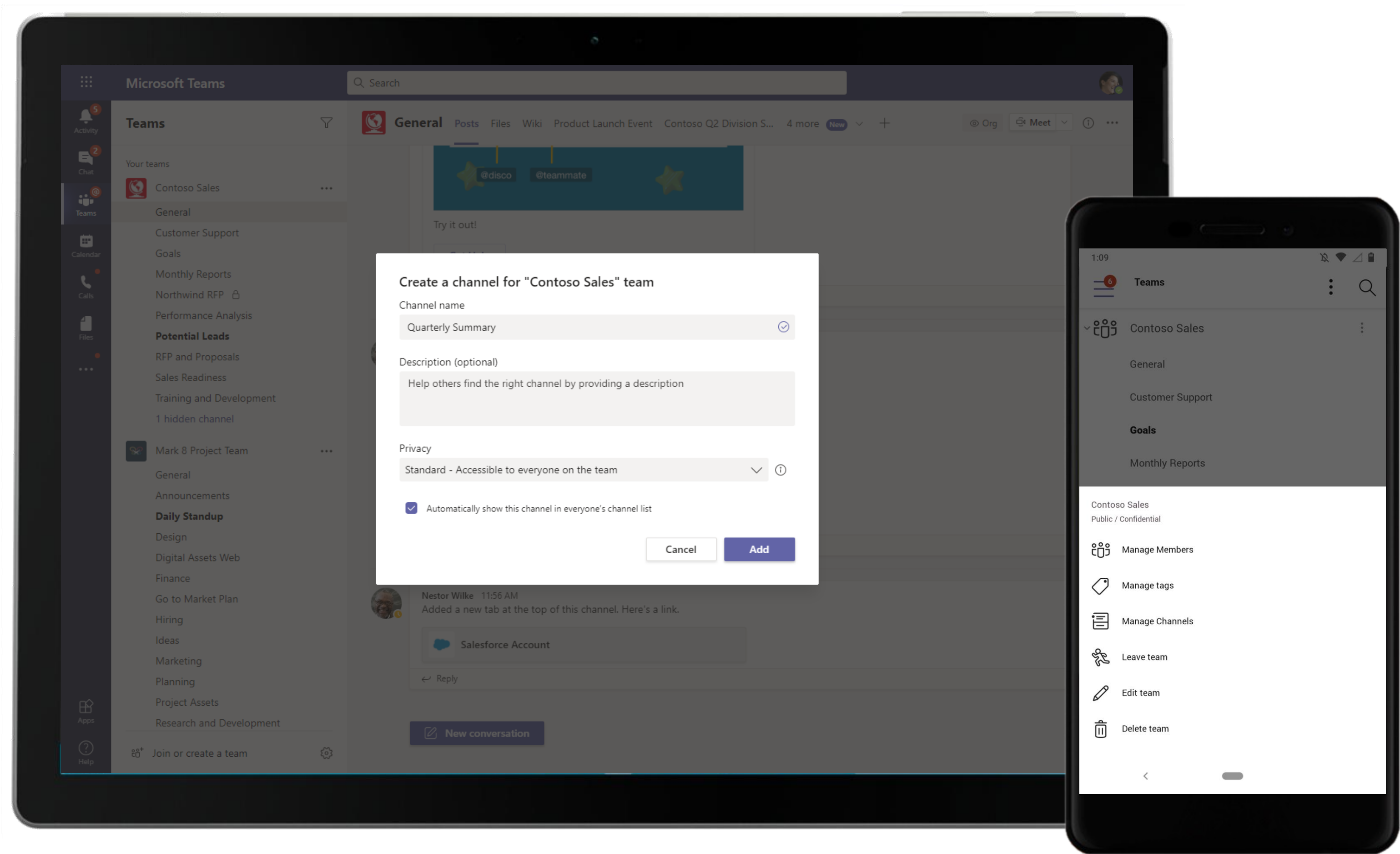
Smartsheet



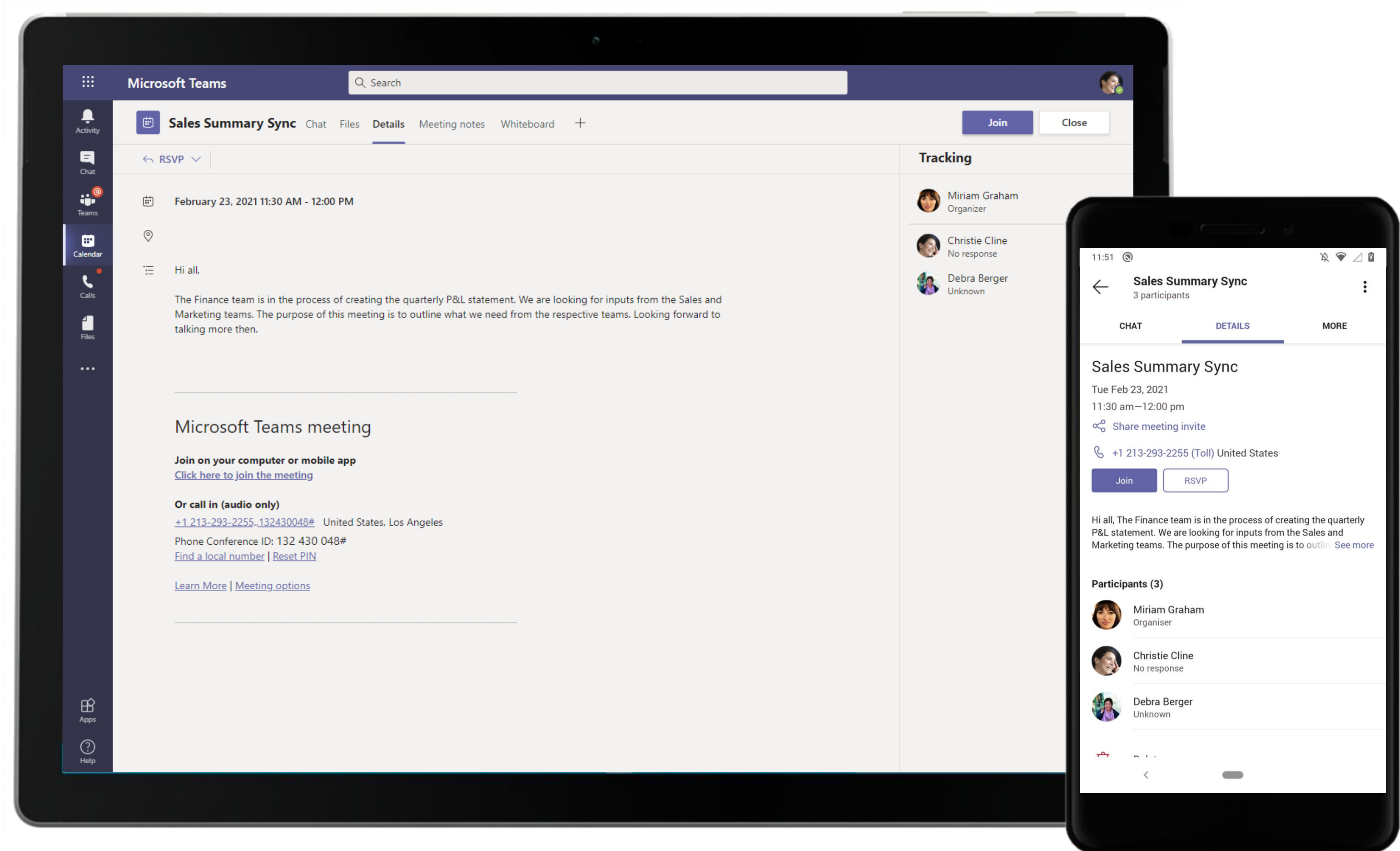
Evernote



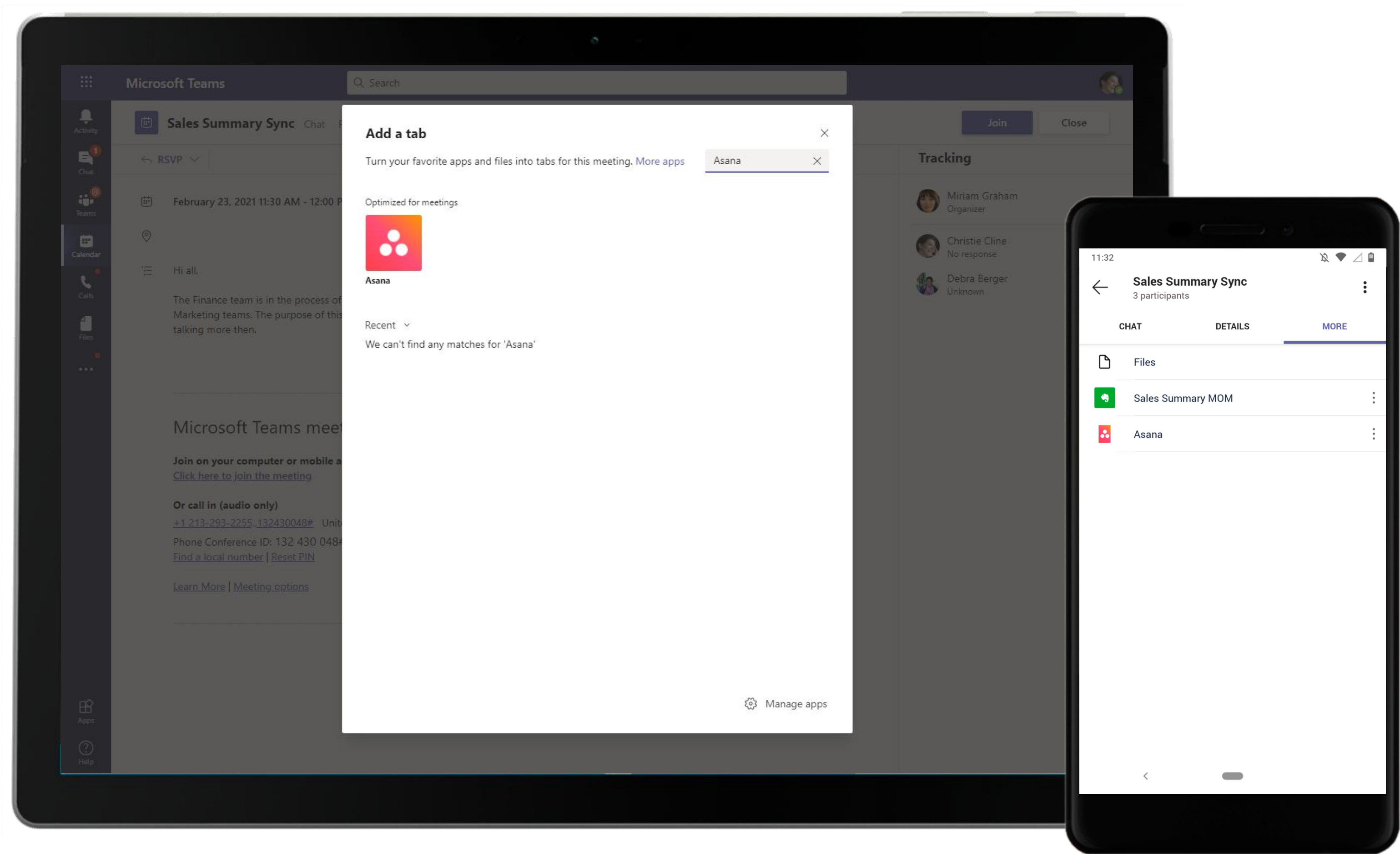
Asana



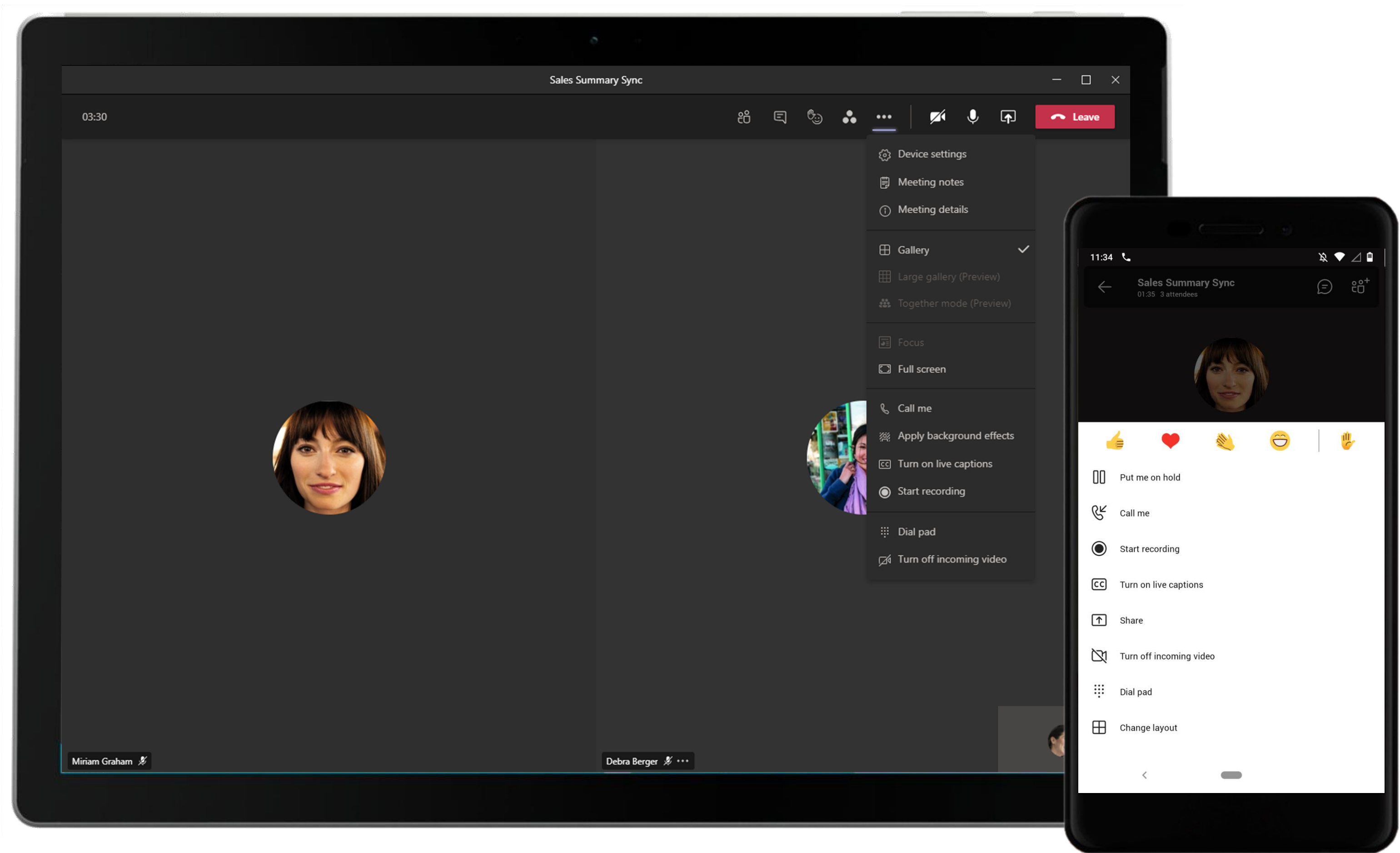
Use a dedicated team to prepare and collaborate on a plan of action. The Sales Manager creates an exclusive team for Sales, Marketing and Finance team members to sync their efforts.



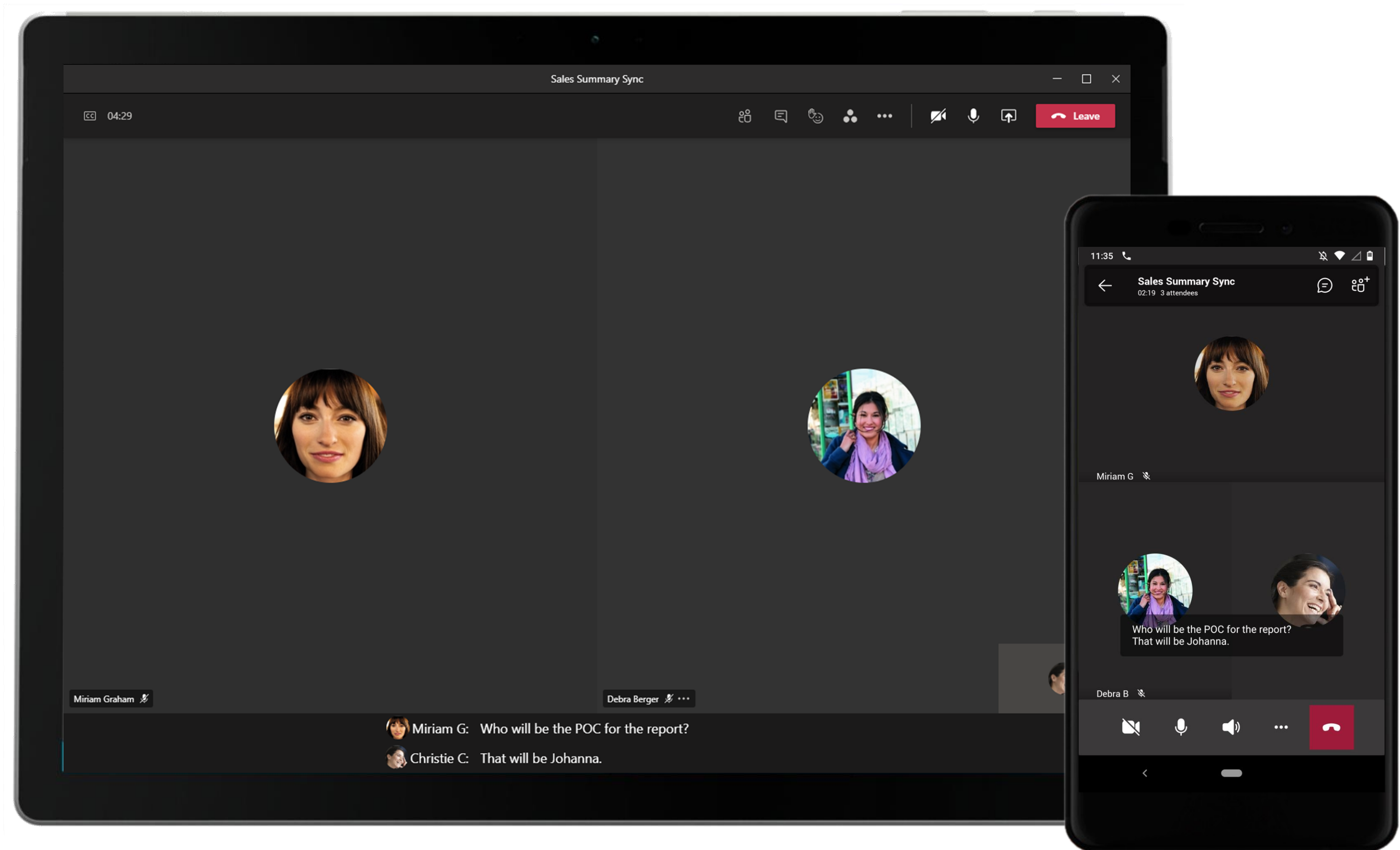
She receives a meeting invite for a sync call. With Microsoft Teams, you can easily schedule meetings and find the best available times for invitees through the native scheduling calendar.



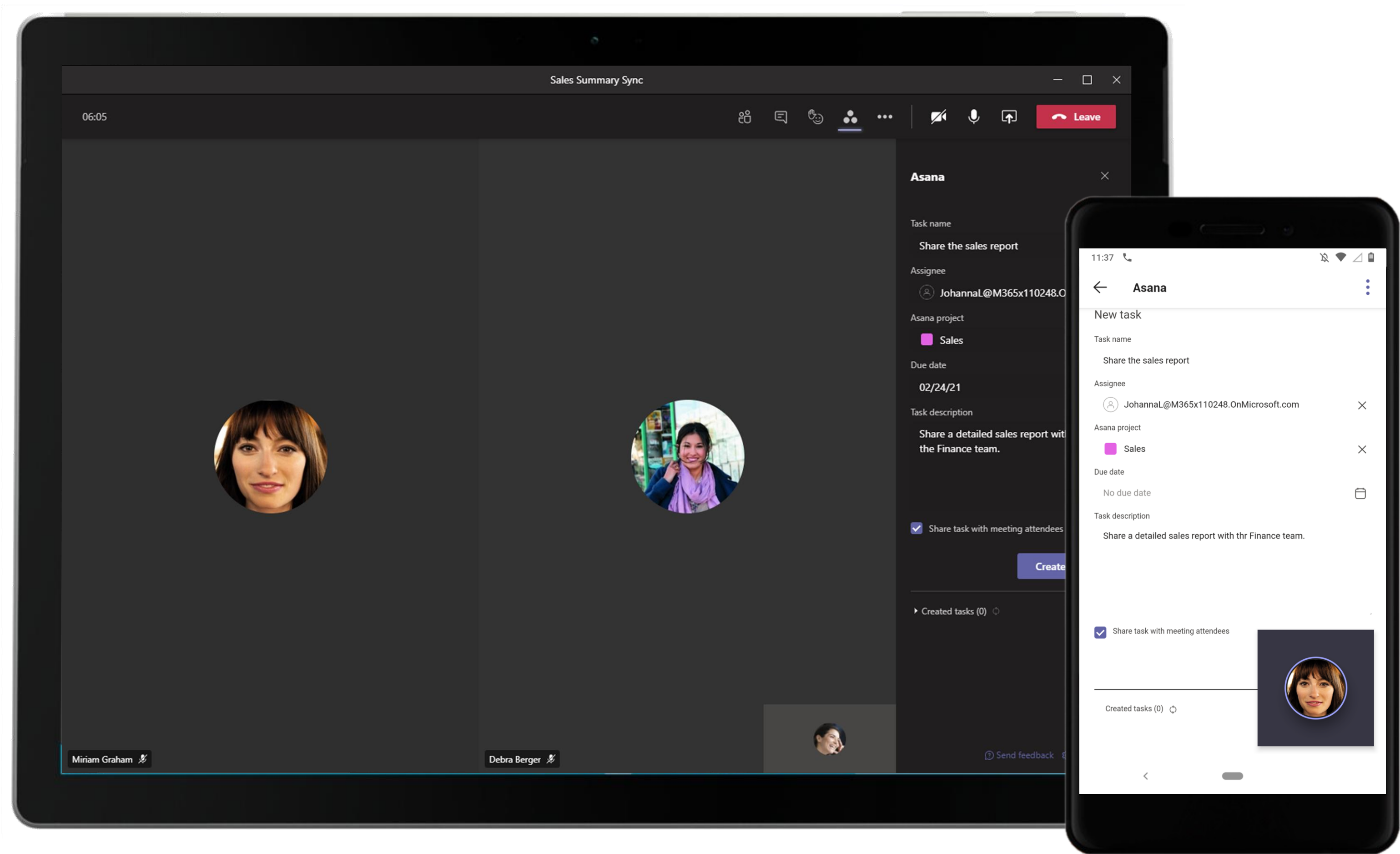
Configure relevant apps for your meeting in a tab to access information necessary during the meeting.



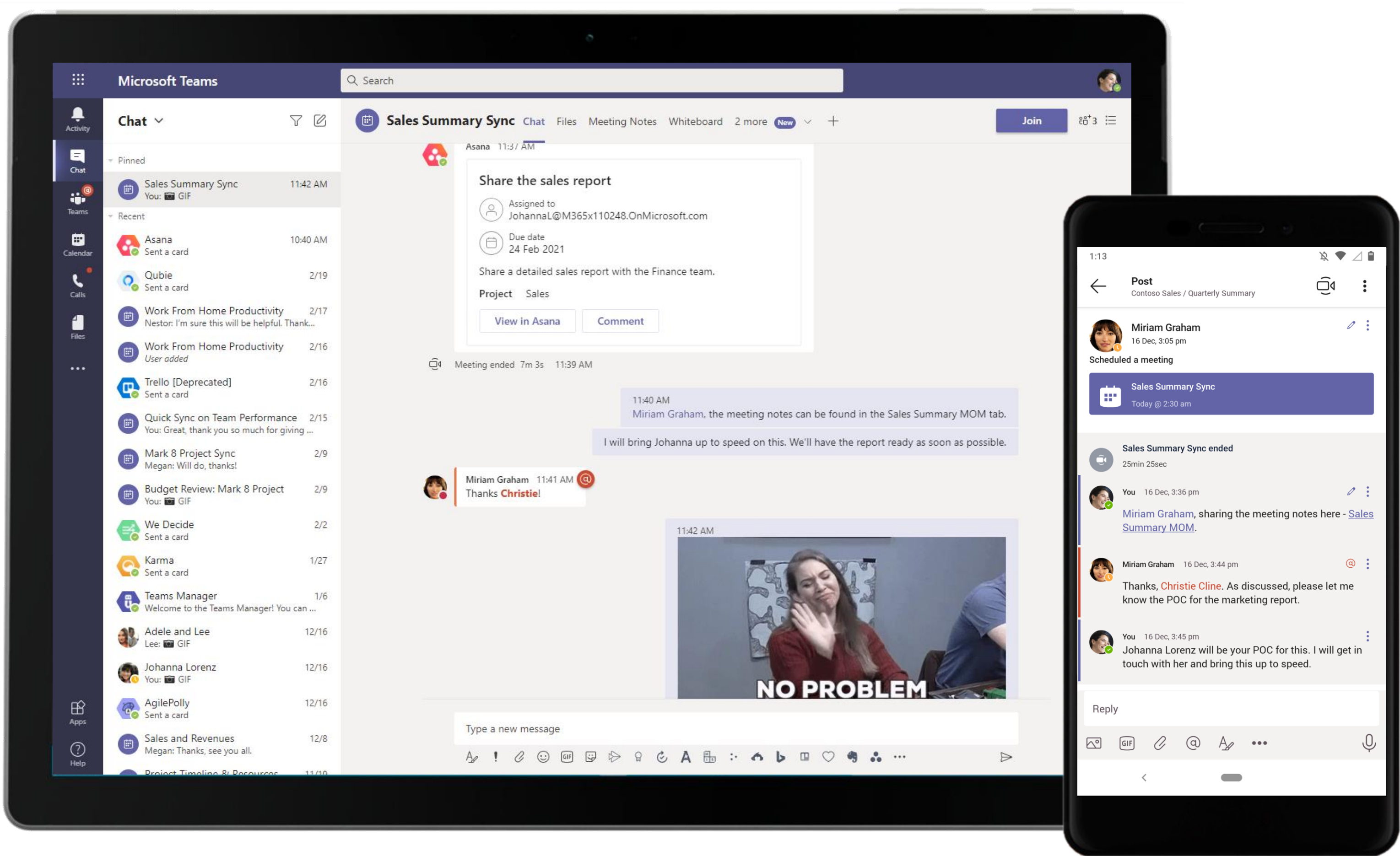
During a meeting, participants can use rich meeting capabilities such live captions, recording, video, screen sharing, file sharing, meeting notes and more to make the meeting engaging and productive.



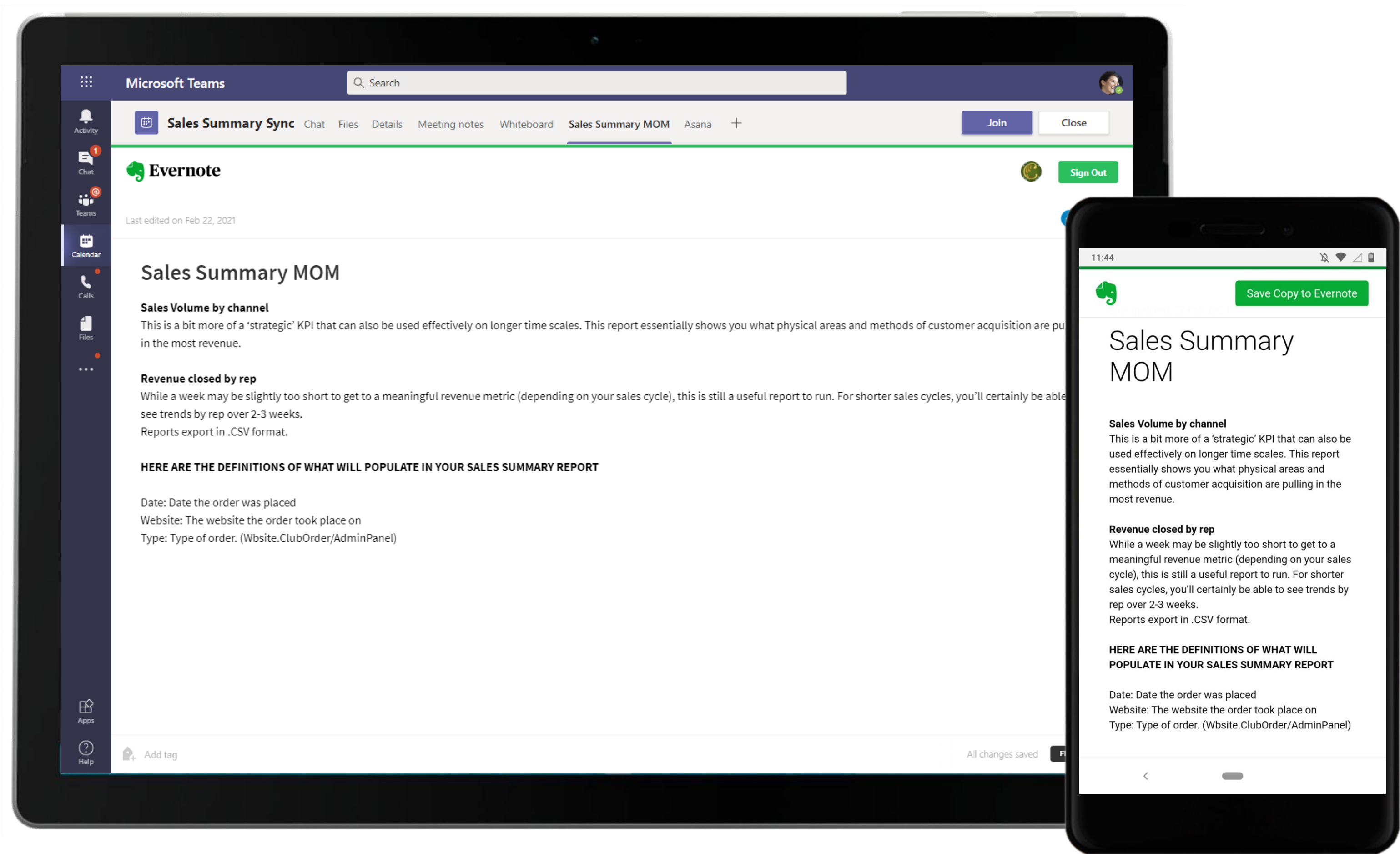
Teams can detect what's said in a meeting and present real-time captions. With the new meeting experience, your captions will include speaker attribution—so you'll see not only what's being said, but who's saying it.



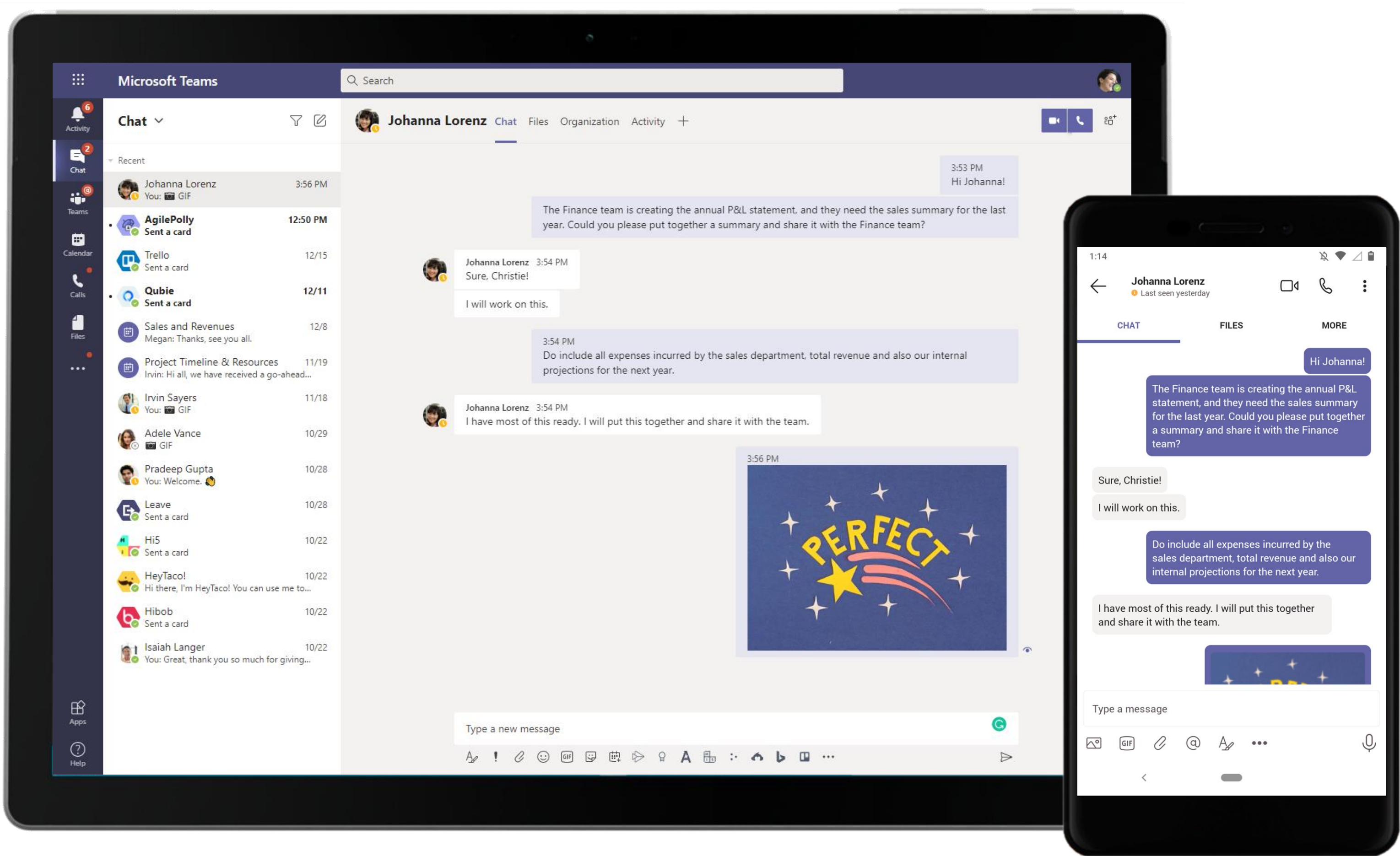
Asana allows you to create, assign and discuss tasks right within a meeting, turning conversations into actionable items. The Sales Manager assigns a task for the creation of the sales report.



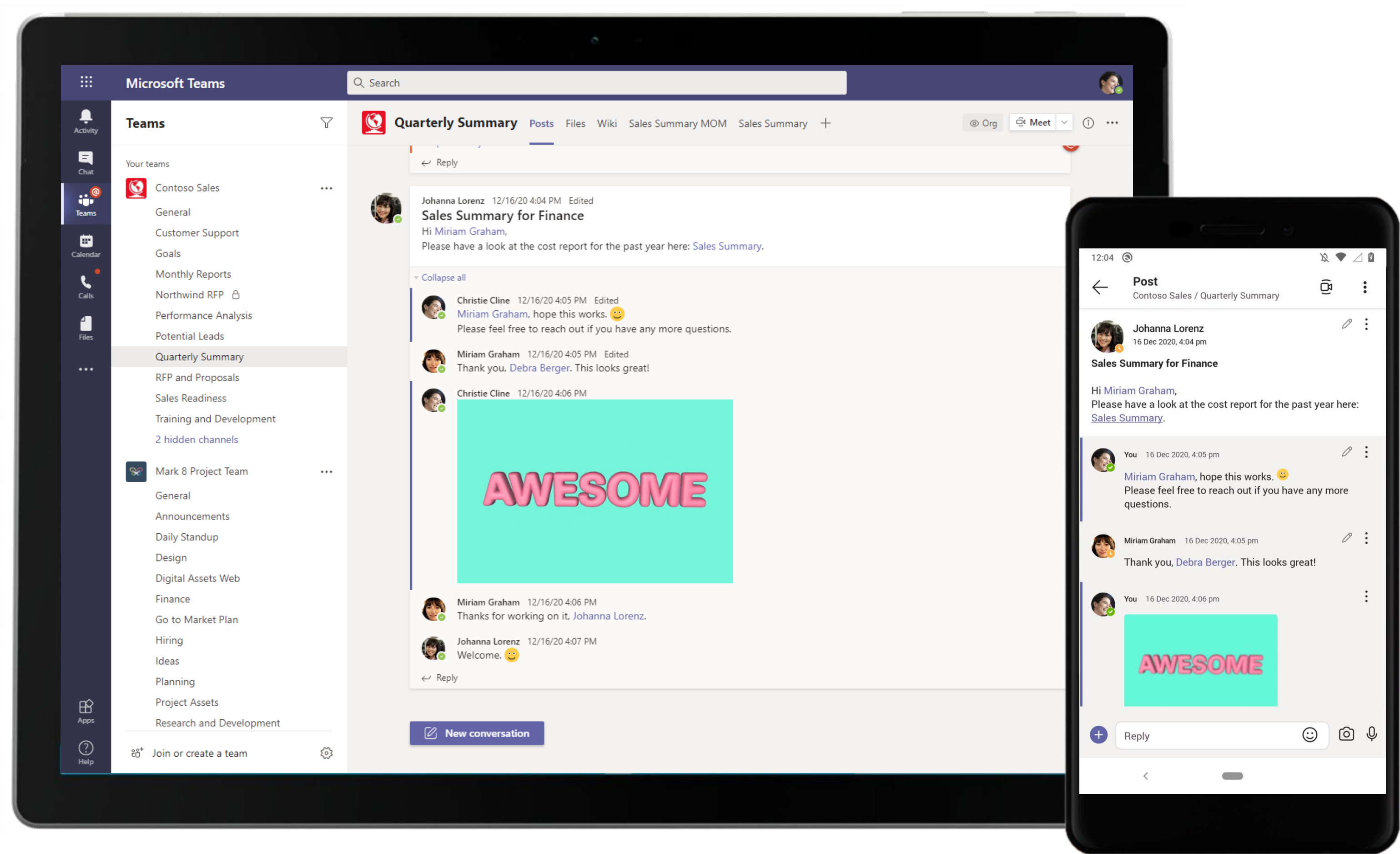
Share important information, updates, files, tasks and more within a meeting chat for a collaborative meeting experience. The Sales Manager communicates with other meeting attendees and views a task created within the meeting chat.



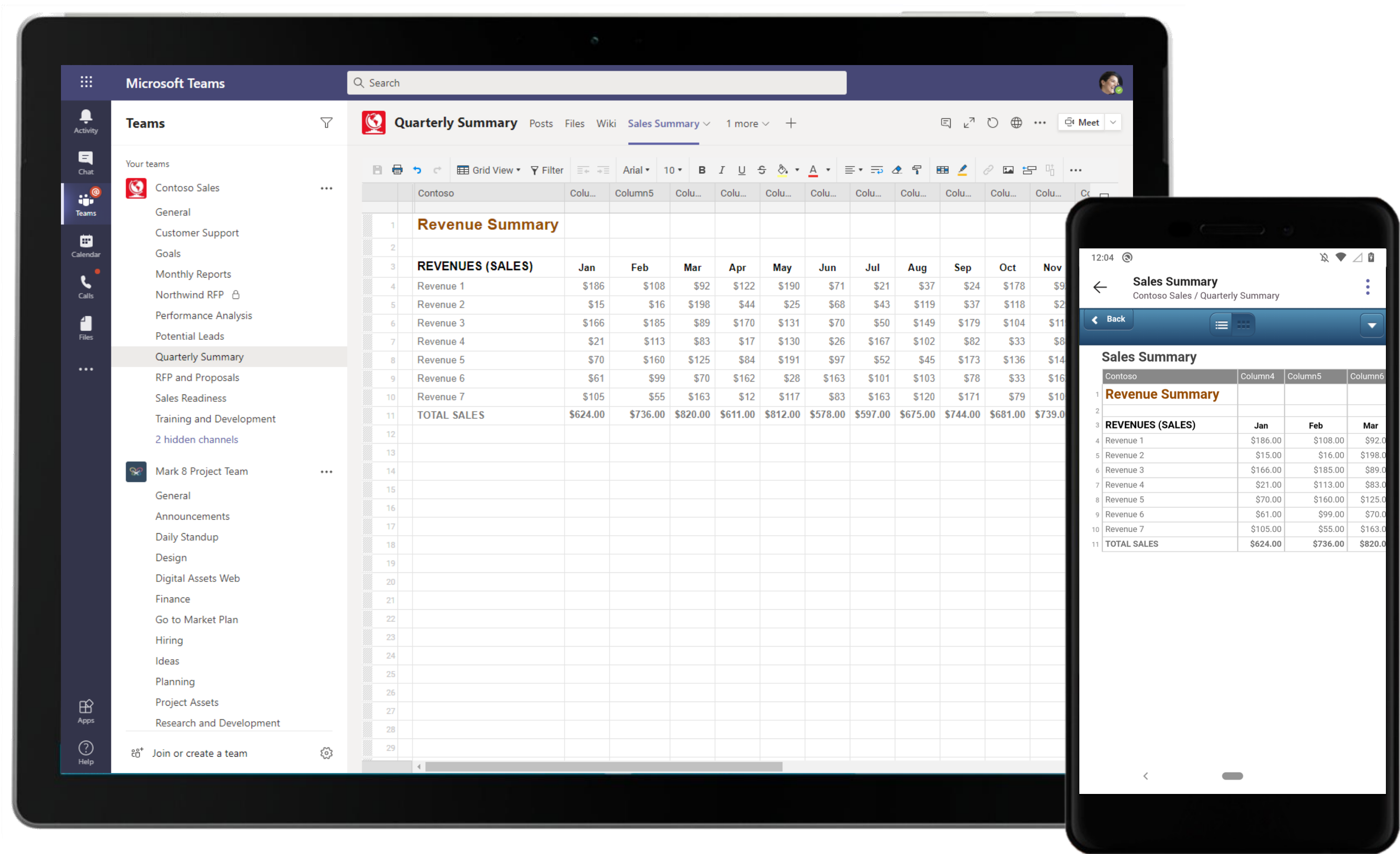
Enjoy collaborative and powerful document creation with Evernote in Microsoft Teams. Add Evernote as a meeting tab to share meeting notes and other useful information and ideas within a meeting.



Quickly reach out to and chat with co-workers. Take conversations offline from channels for 1:1 discussions. The Sales Manager brings the Sales Associate up to speed.



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



Add Smartsheet sheets, dashboards, and reports as 'Tabs' within a Teams channel and bring conversations together with a current view of projects, while providing a central location where teams can work more effectively.



Empowering Frontline Sales Managers

Sales Manager

Scenario Walkthrough

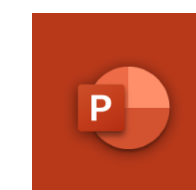
Contoso needs to give customers a wealth of information to make an informed decision to choose from their products and services. A Sales Manager for Contoso wants to equip front-line and customer facing employees with product and service information to improve customer interaction with their brand. See how she leverages various apps and features in Microsoft Teams to do her job efficiently.

- Sets up a live training event for the Sales and Customer Service teams to share information.
- Walks them through the training deck that details action items during the live event via PowerPoint.
- Participates in a Q&A session in the live event by answering the questions sent by the participants.
- Creates a post in the channel highlighting meeting outcomes and guidelines.
- Shares the video training details via Microsoft Stream.

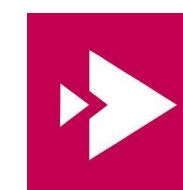
How did Microsoft Teams help the Sales Manager to execute her roles and responsibilities?

- Collaborate and participate with team members org-wide or in groups with live event within Microsoft Teams.
- Screenshare documents and slide decks over calls and save them as reference material in the Files tab.
- Create clear and concise presentations with PowerPoint in Teams.
- Record, share, and view meeting recordings and other rich video content with Microsoft Stream.

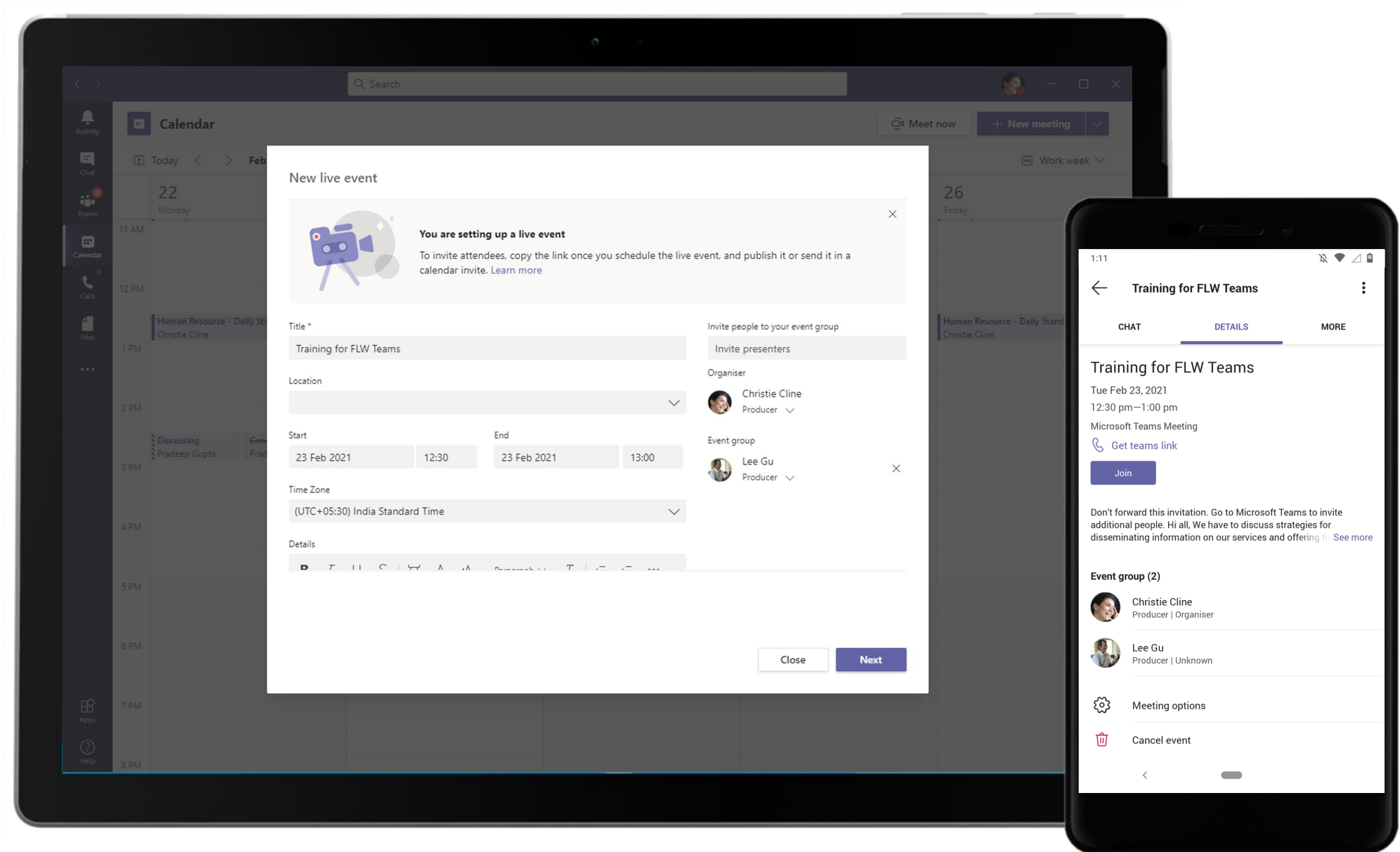
Which app integrations on Teams made it possible?



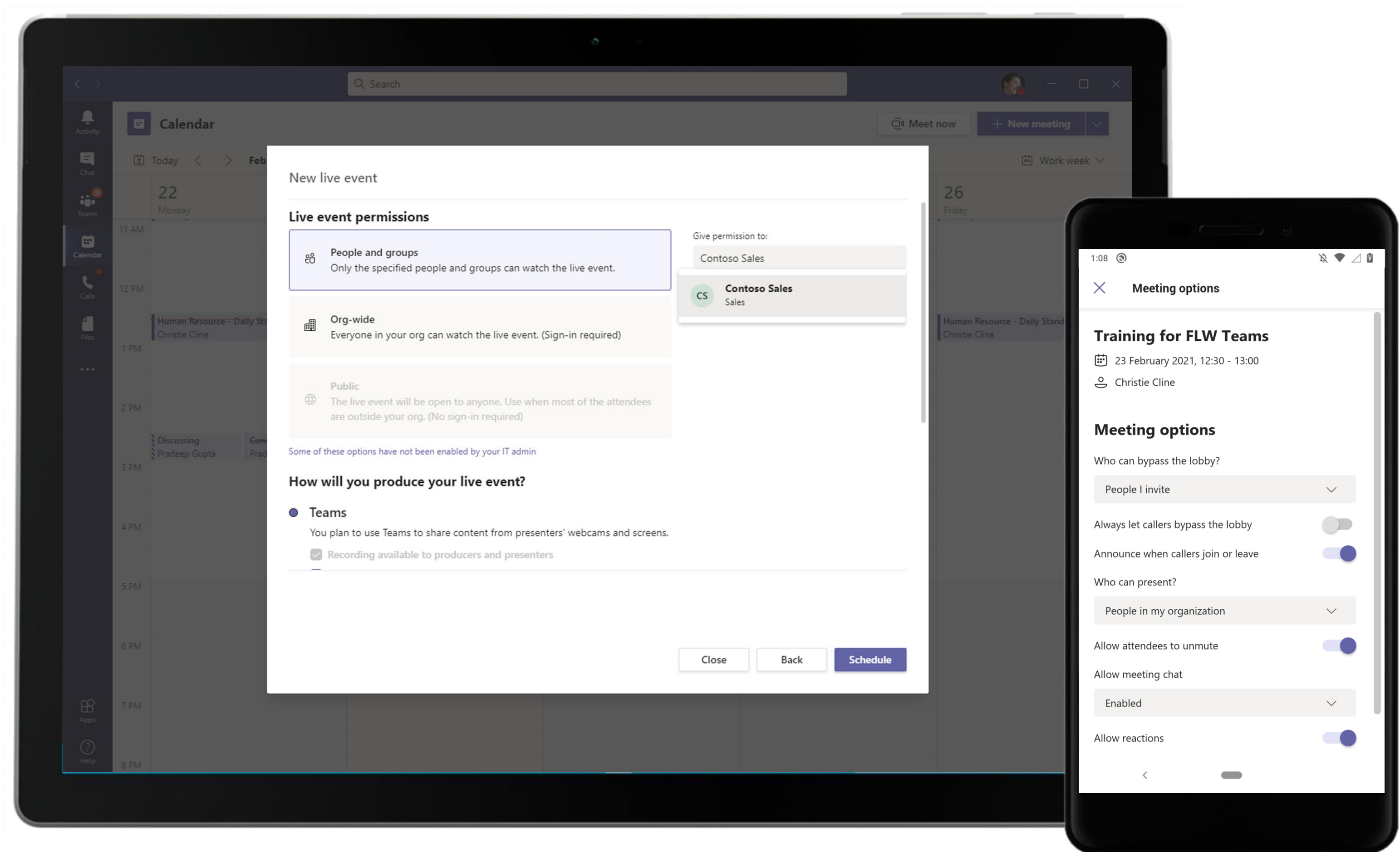
PowerPoint



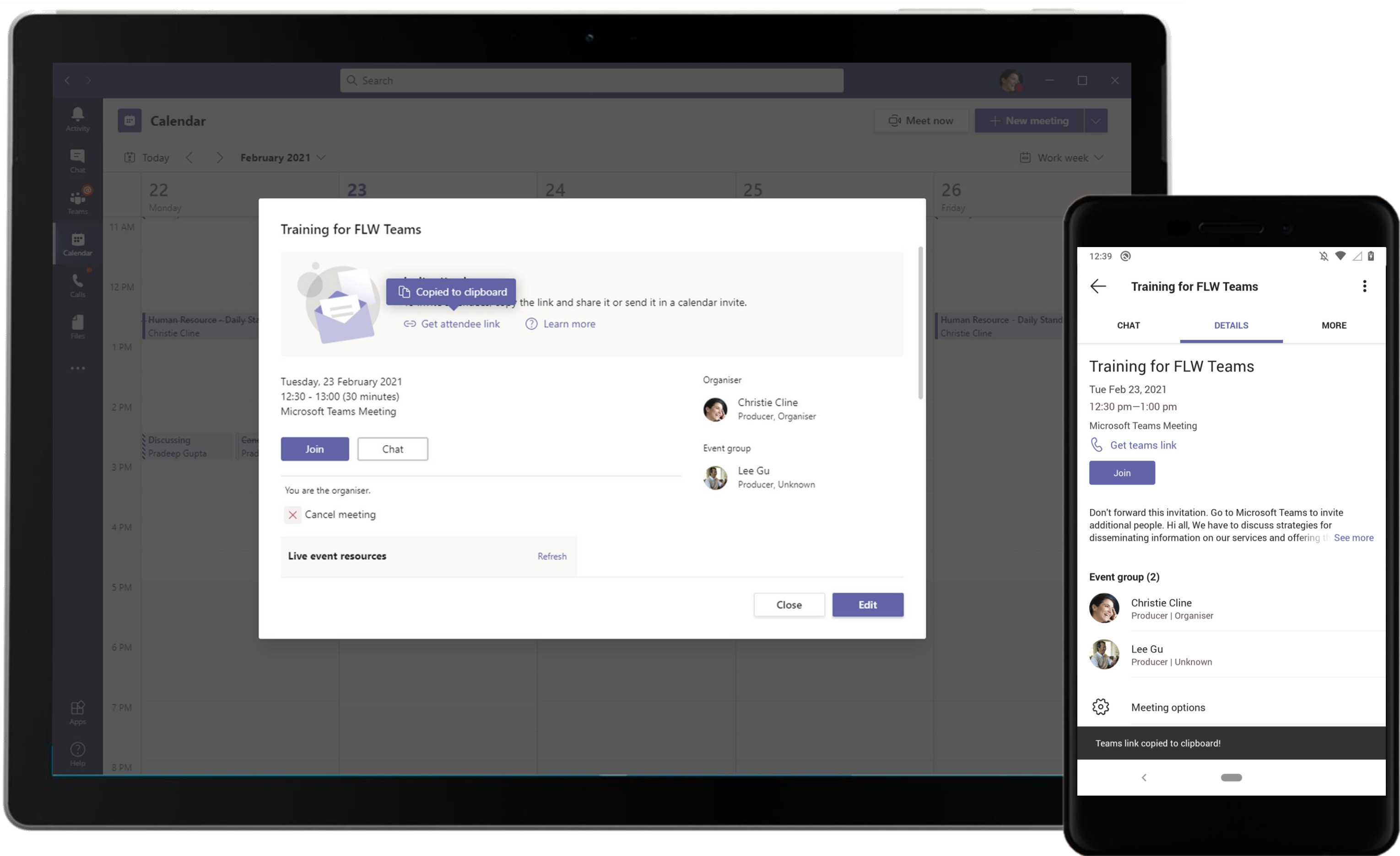
Microsoft
Stream



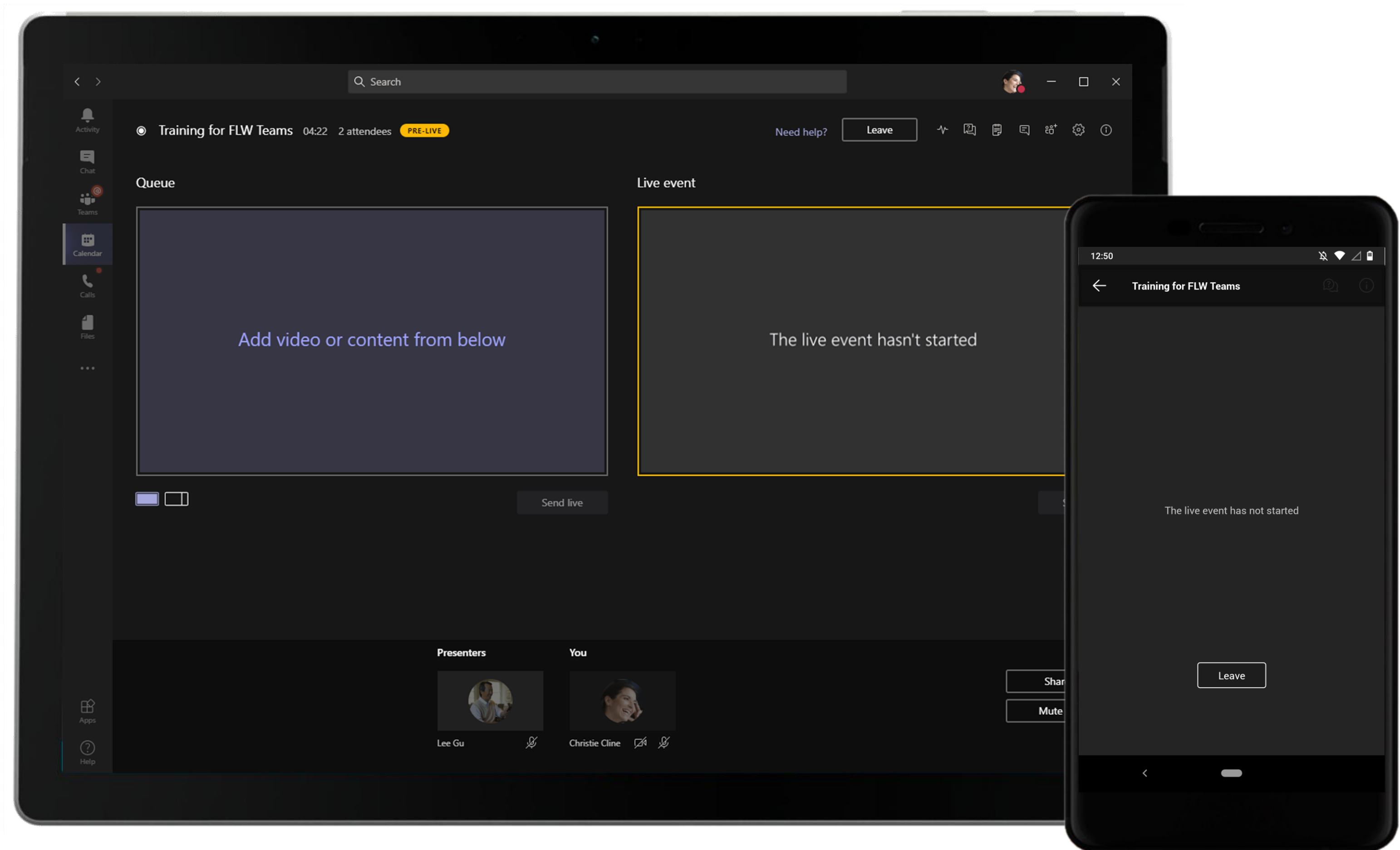
Microsoft Teams live events are an extension of Teams meetings that enable you to schedule and produce events that stream to large online audiences. The Sales Manager uses the live events feature to schedule a training event.



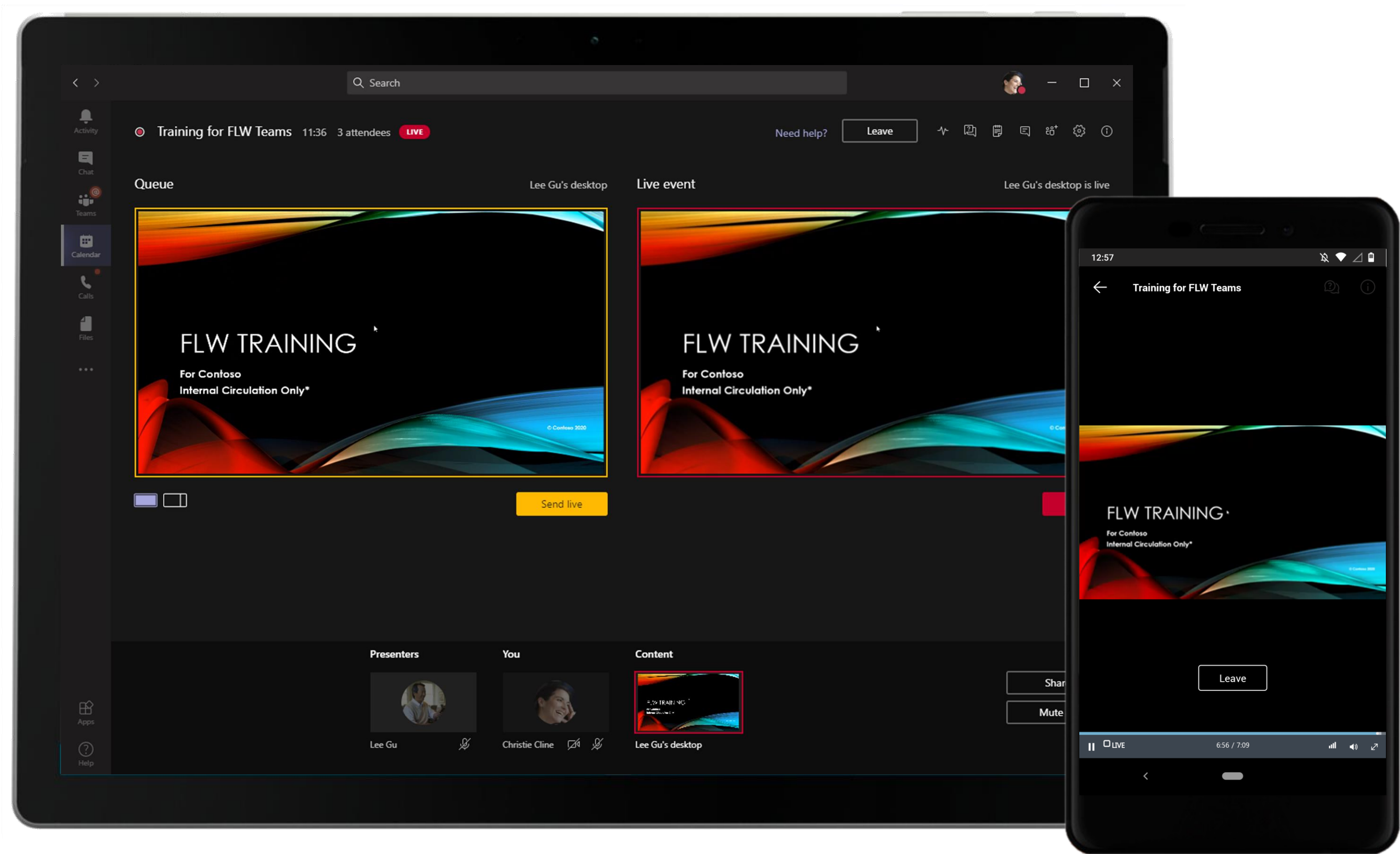
Organizers can configure permissions for the live event, enable Q&A for the event and customize other permissions based on their requirements.



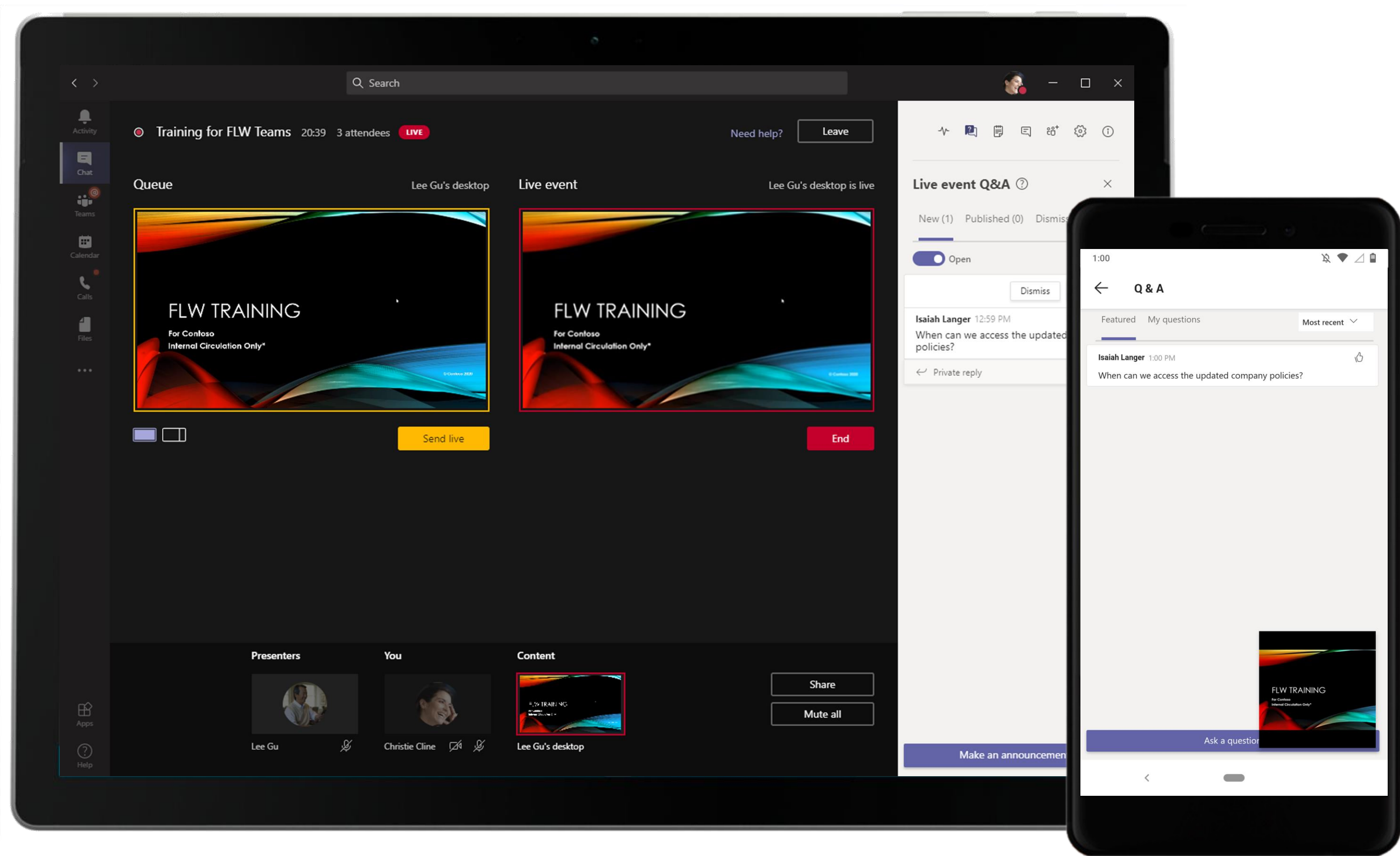
The Sales Manager, who is the organizer of the meeting, can set attendee permissions, assign roles and send invites for the live training session.



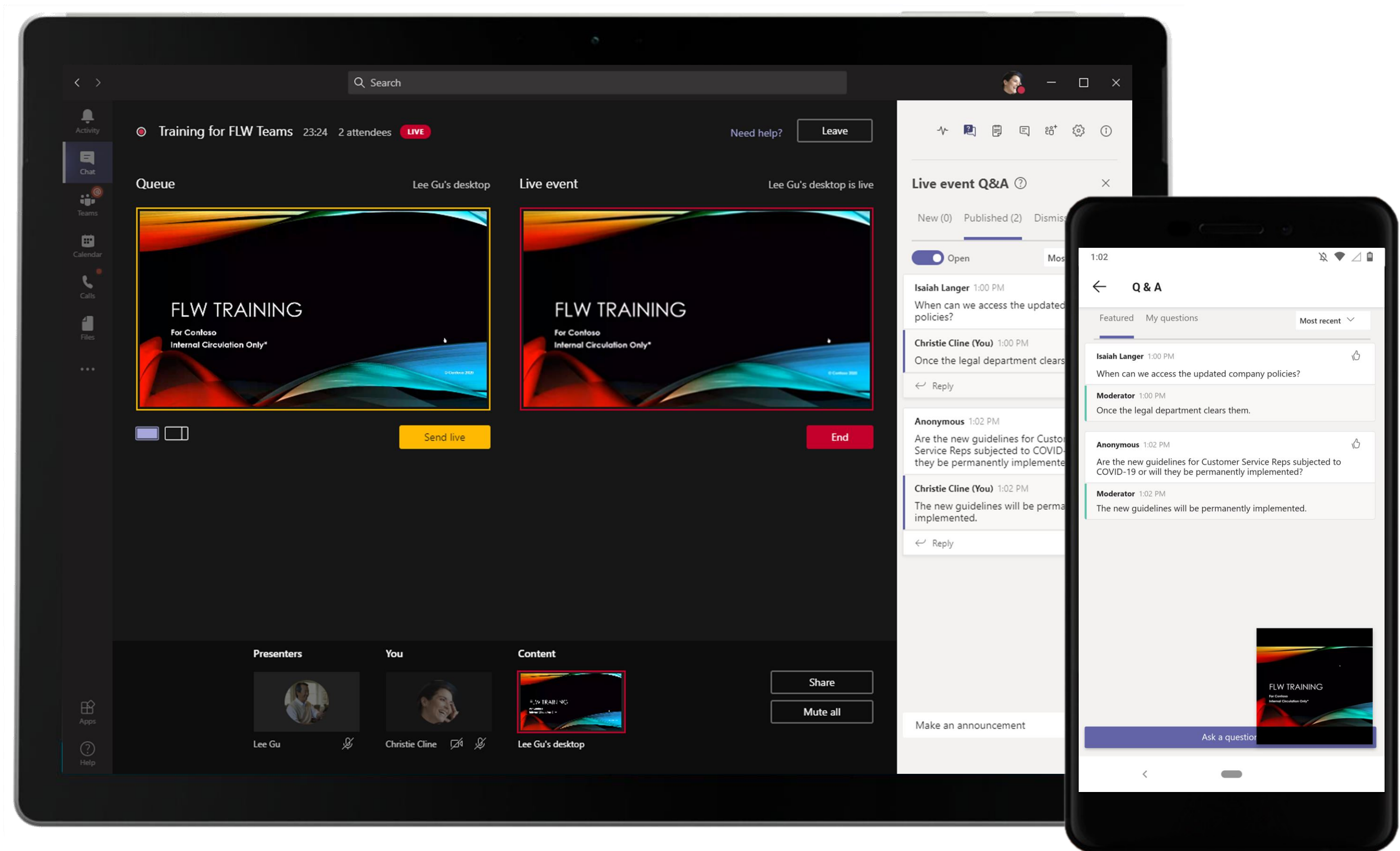
Event organizers can join the event before the start time and add content, share their screen and manage the event so that everything is in place before going live.



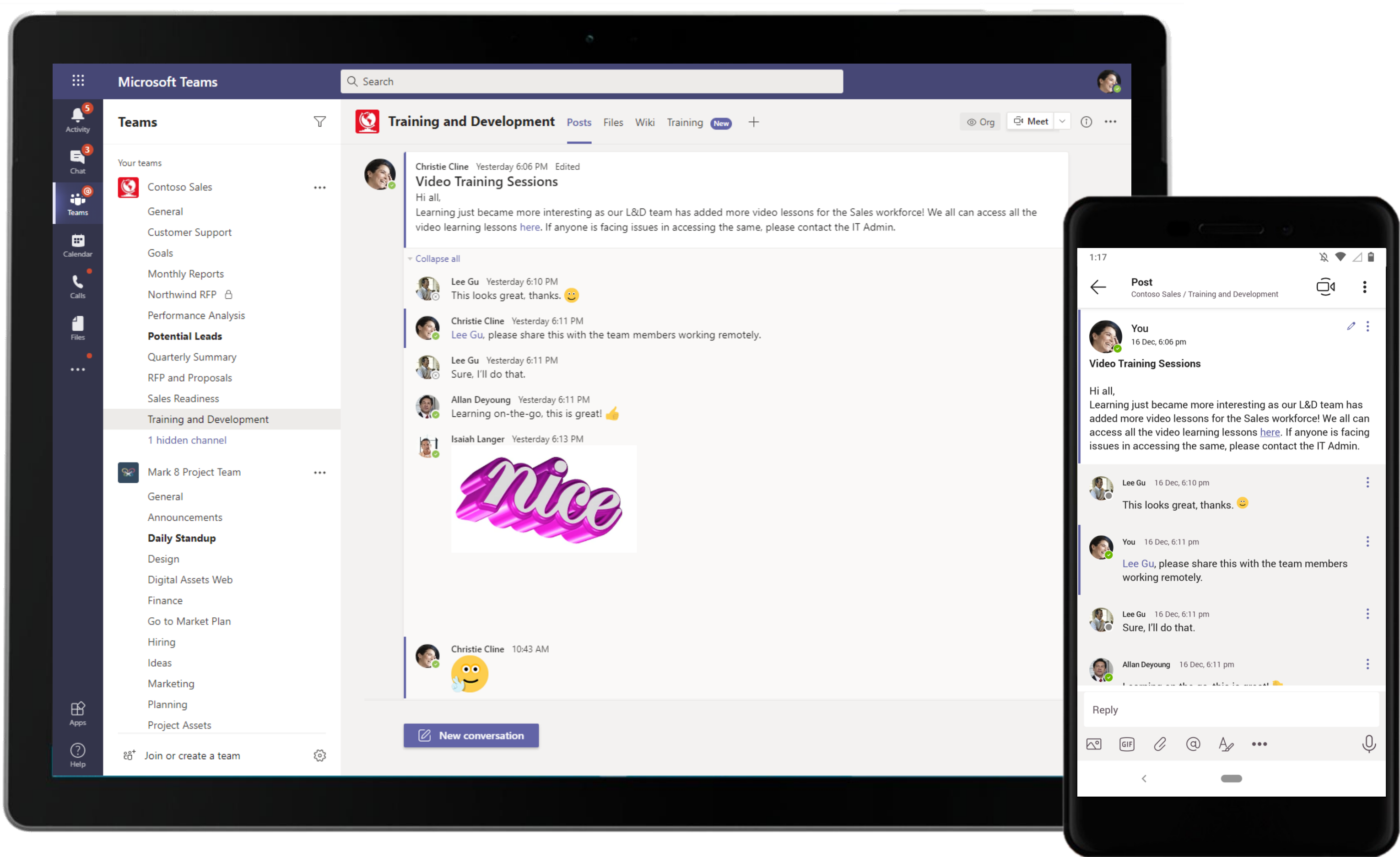
Event organizers can choose to share their screen, present documents, share videos, images and more for an engaging live event.



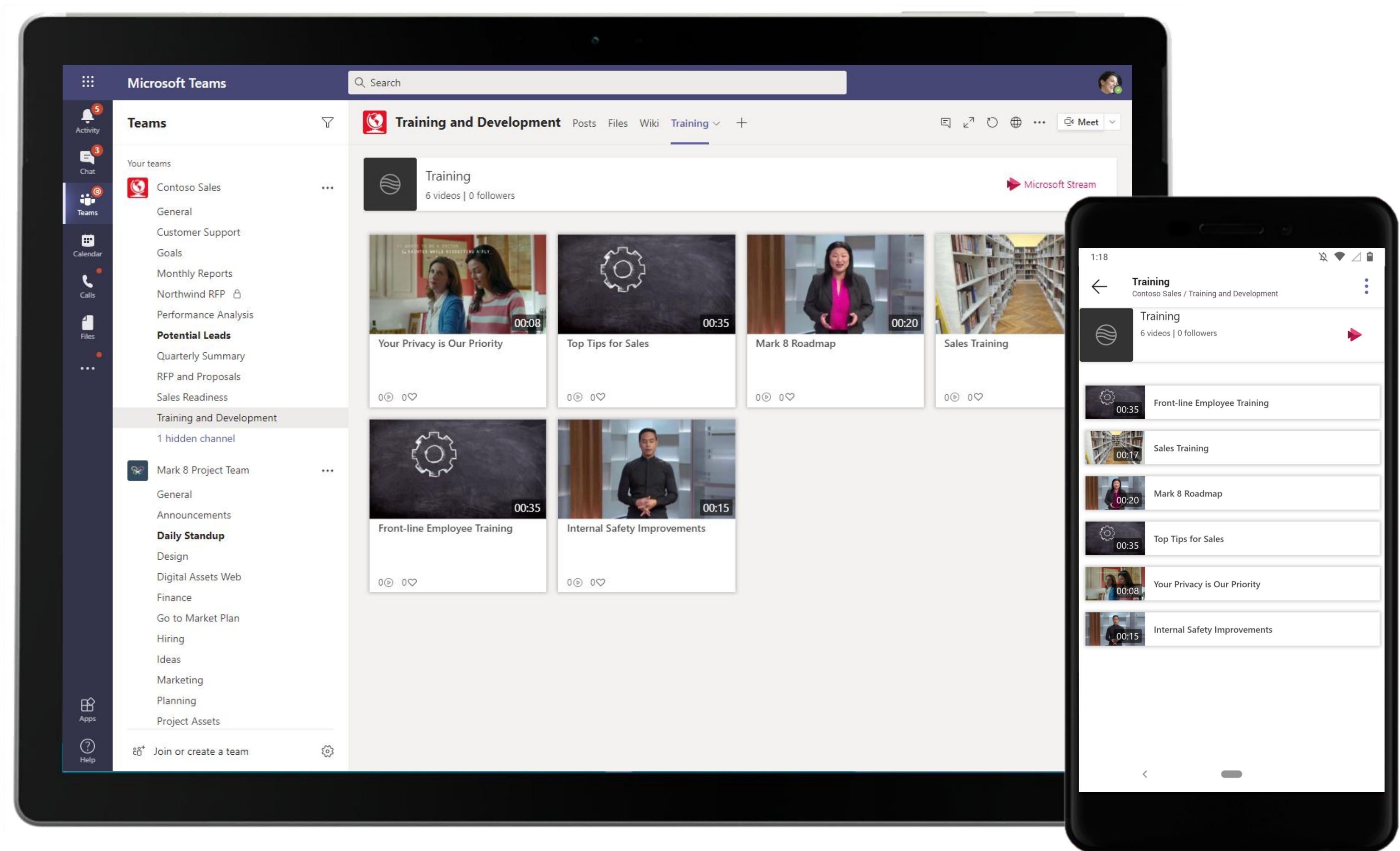
As the producer/ organizer of the live event, the Sales Manager can configure options like moderating a Q&A session and choose to publish or reject attendee questions.



Organizers can respond to questions during the Q&A session to engage with the audience or make an announcement to communicate to all the participants over chat.



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



Microsoft Stream enables you to share video links or a collection of videos within a channel for easy access. The Sales Manager shares a Stream channel with training videos.



Use Insights

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

Sales Superpowers in Teams

Capabilities and features used...

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

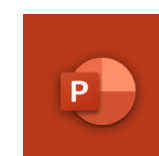
Apps that enable an immersive experience in Teams



Word



Excel



PowerPoint



Communities



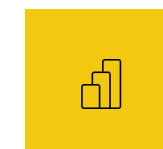
Bing News



Shifts



Ment.io



Power BI



Salesforce



Zoho CRM



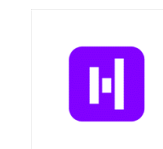
Calendar
BOT



Disco



CT- CRM
and ERP
Chatbot



HitHorizons



Decisions



Zoho
Desk



Tasks by
Planner
and To Do



Smartsheet

Meet the Business Decision Makers

Sales



Sales Manager

"As sales leaders, we have to set the bar high for ourselves as well as our teams."

- Recruit and train new sales staff, assign specific tasks to other sales staff, and monitor the team's sales performance
- Solve customer complaints and answer customers' questions
- Provide sales staff with constructive feedback



Sales Analyst

"Not everything that can be counted counts, and not everything that counts can be counted."

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

Meet the Business Decision Makers

Sales



Sales Associate

"What makes you weird, makes you unique and therefore makes you stand out."

- Build in-depth knowledge of the product and keep up with product and/or feature updates
- Improve customer engagement and providing outstanding customer service.
- Introduce promotions and opportunities to customers



Sales Lead

"Care enough to create value for customers. If you get that part right, selling is easy."

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



Streamline Sales Activities to Beat Revenue Targets

Sales Lead

Scenario Walkthrough

The Sales team is essential to meet an organization's over-arching revenue goals. The sales professionals need to dedicate time and use the right tools to build and enable a cohesive team, especially in medium to large-size organizations. See how the Sales Lead makes use of Microsoft Teams in combination with other apps to streamline the activities for expected results.

- Sets up a meeting for discussion and configures a Power BI meeting tab to share the sales performance report.
- Shares the sales targets and department overview within a Zoho CRM Channel tab.
- Records the meeting call to provide easy access to the discuss for future reference.
- Utilizes Workstreams.ai to create a task board as per the discussion in the meeting.
- Uses Zoho CRM to share the sales opportunity with the team and keep them updated with its proceedings.
- Announces the sales opportunity closure and congratulates the team for the outstanding turnover.

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

- Share vital CRM records and stay updated on key sales metrics with Zoho CRM.
- Collaborate more, manage tasks efficiently with Workstreams.ai.
- Turn complex data into powerful, visual graphics to make informed and data-driven decisions using Power BI within a channel.
- Leverage screen share, meeting records, live captions and more for an engaging meeting experience.

Which app integrations on Teams made it possible?



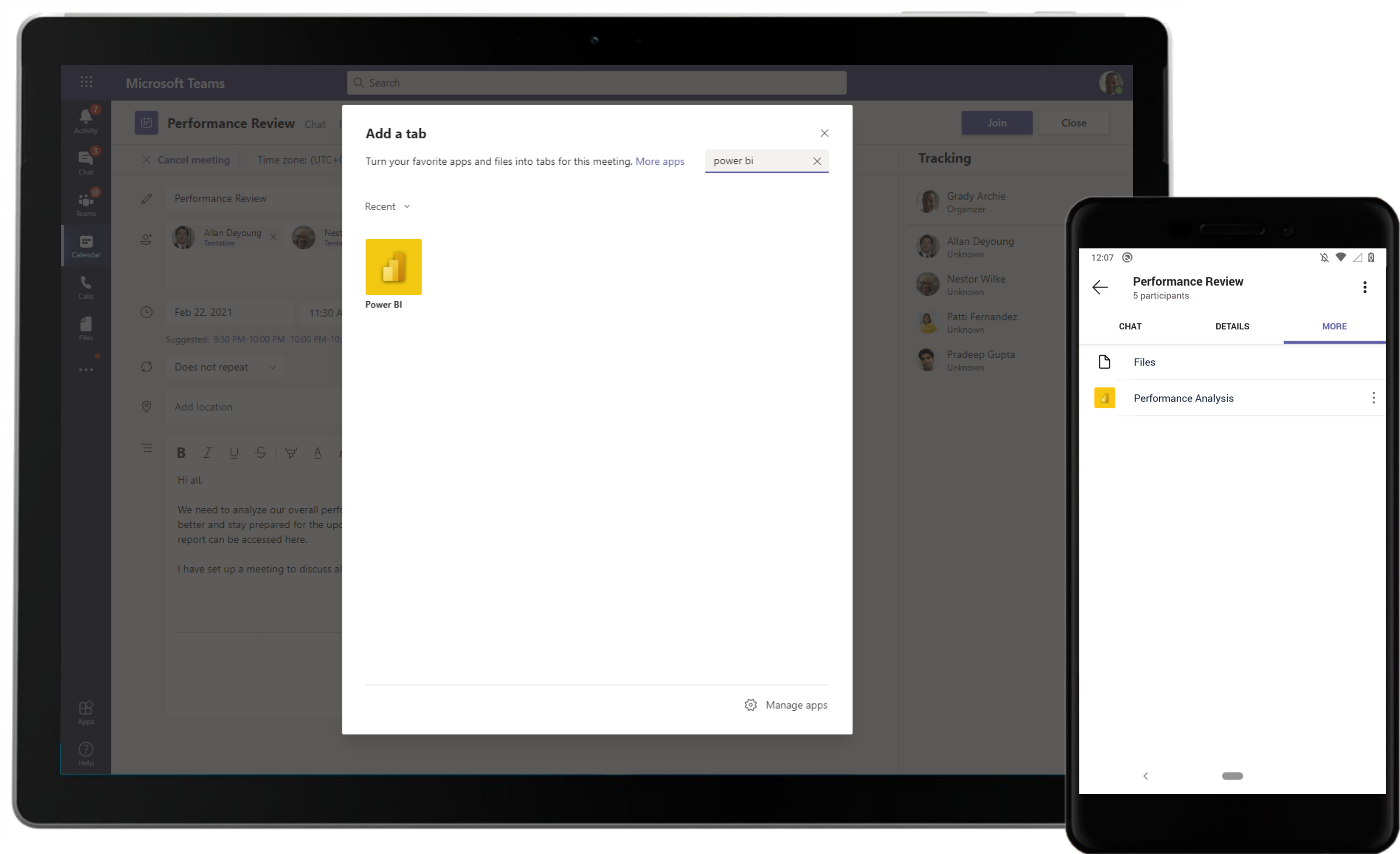
Power BI



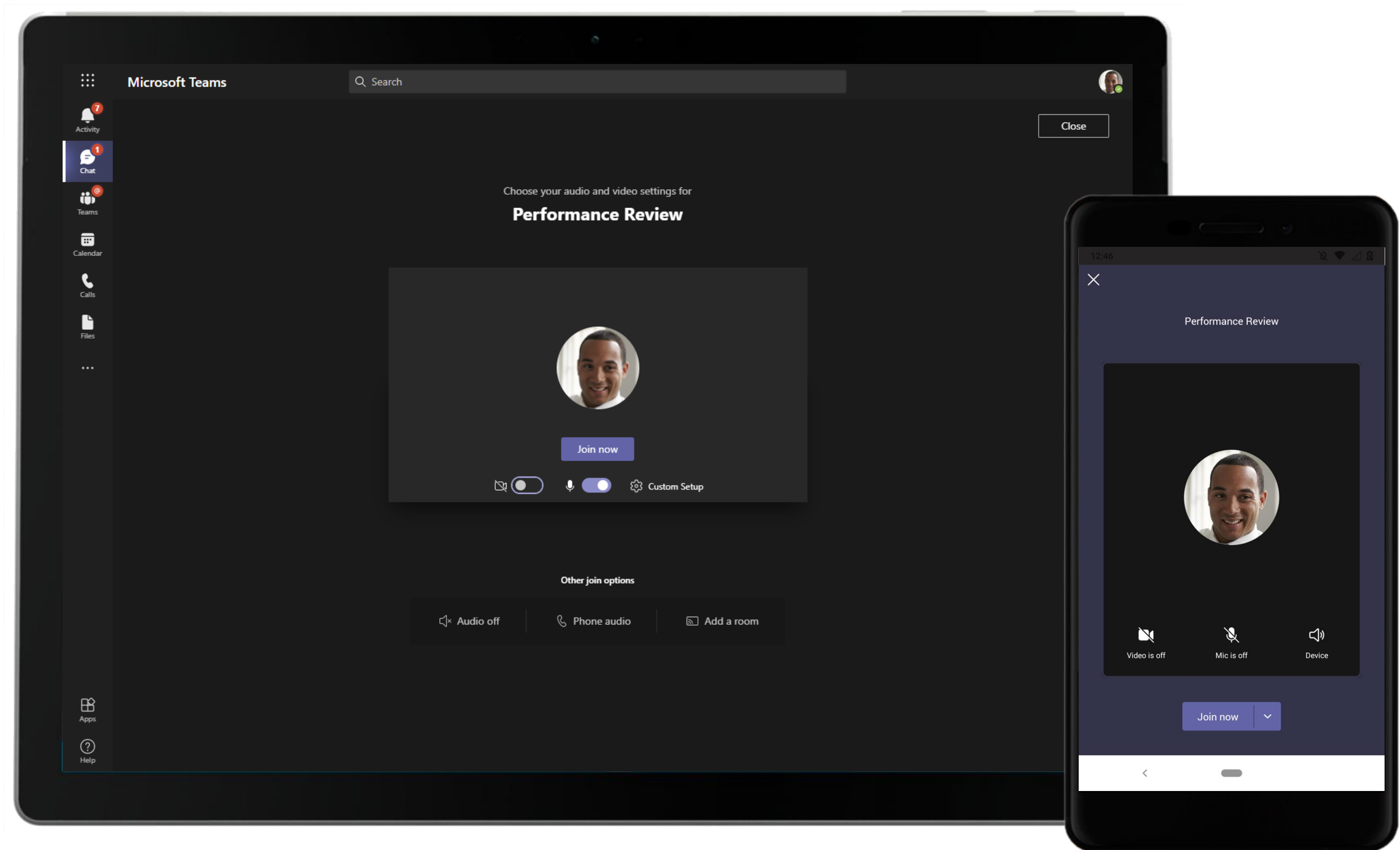
Zoho CRM



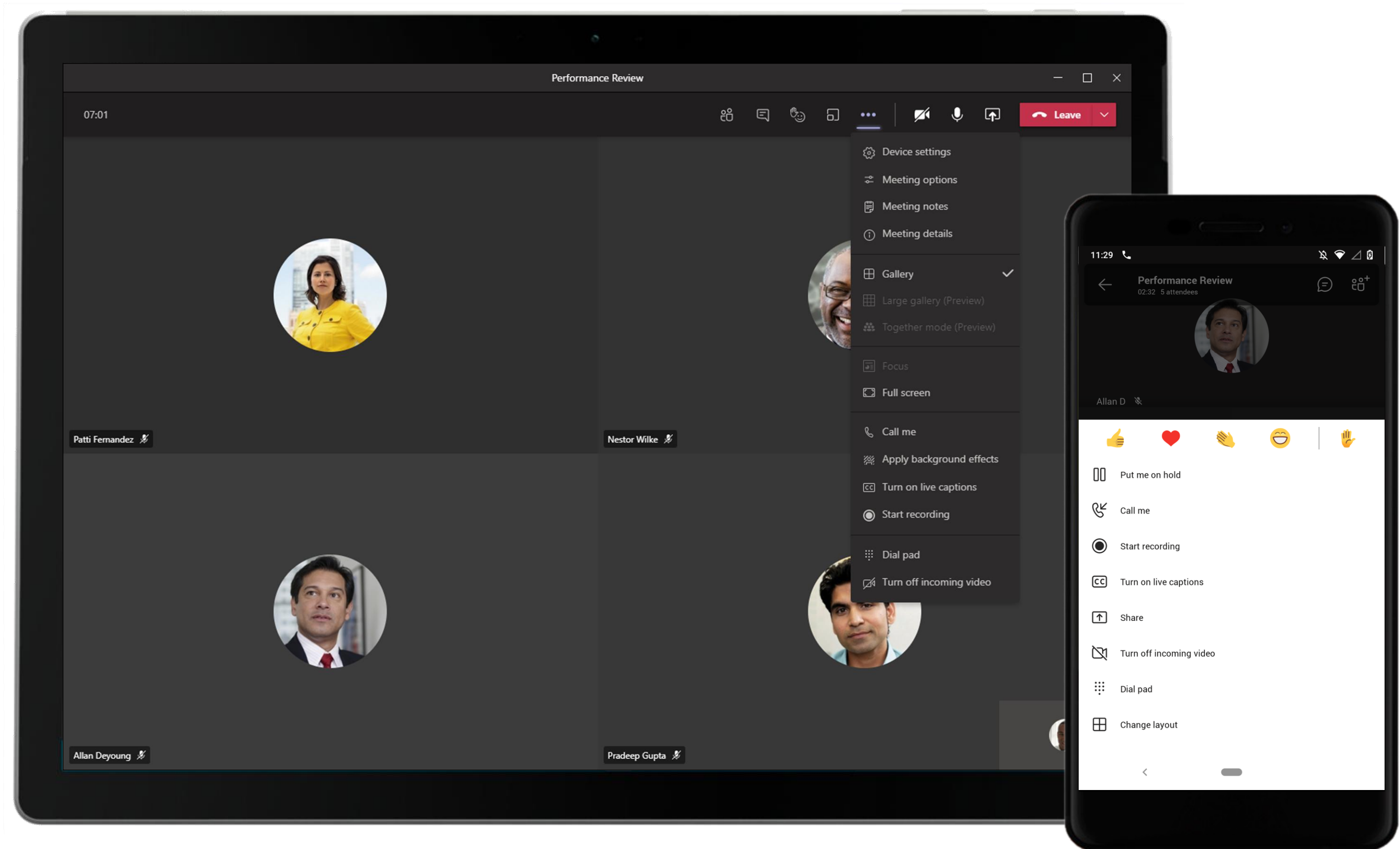
Workstreams.ai



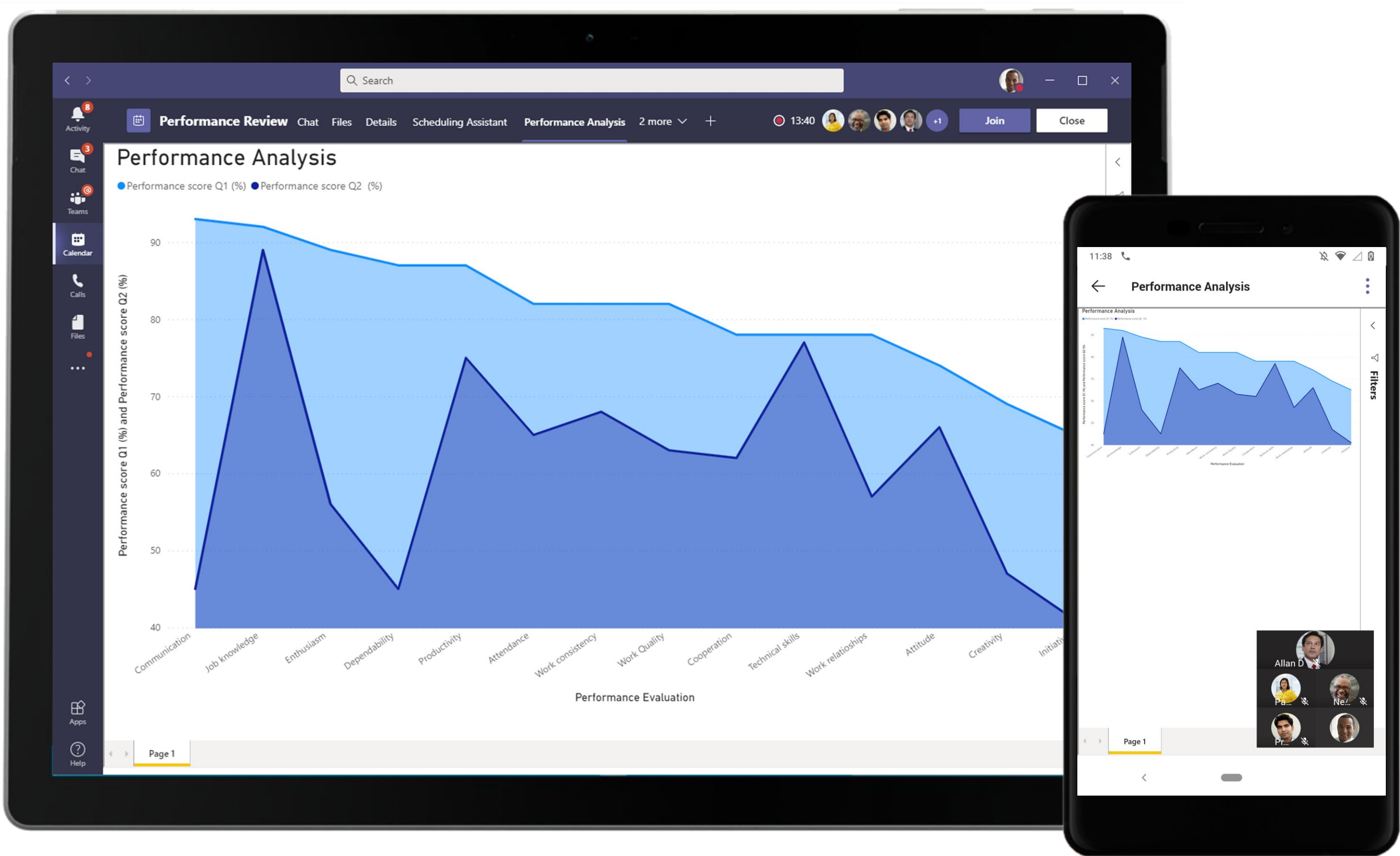
The tabs link to your favorite files, apps, and services. The Sales Lead adds Power BI tab to the meeting.



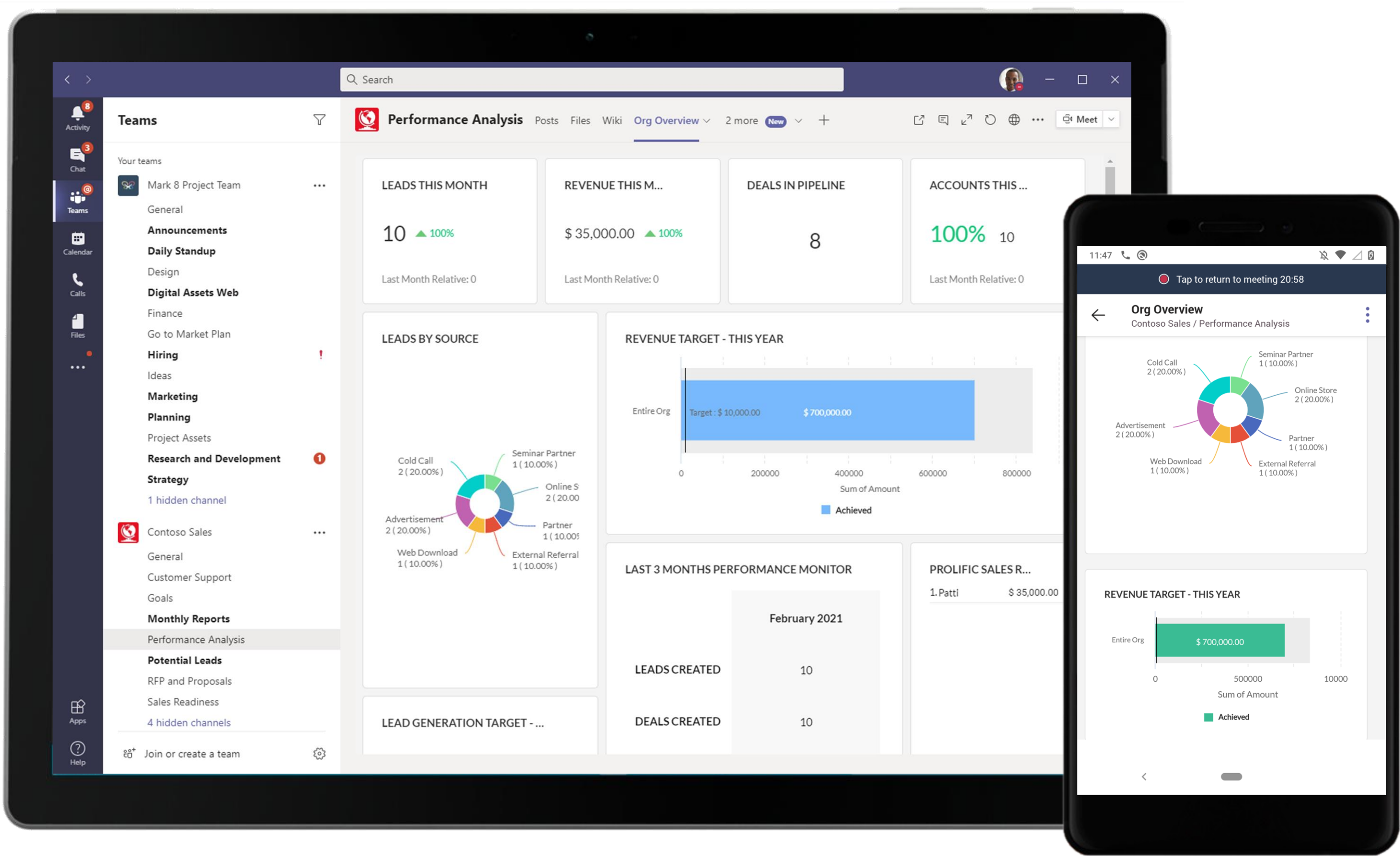
Meeting participants can choose to join a meeting with their video and audio turned off to avoid disturbing a meeting in progress. This can be turned on later during the meeting whenever required.



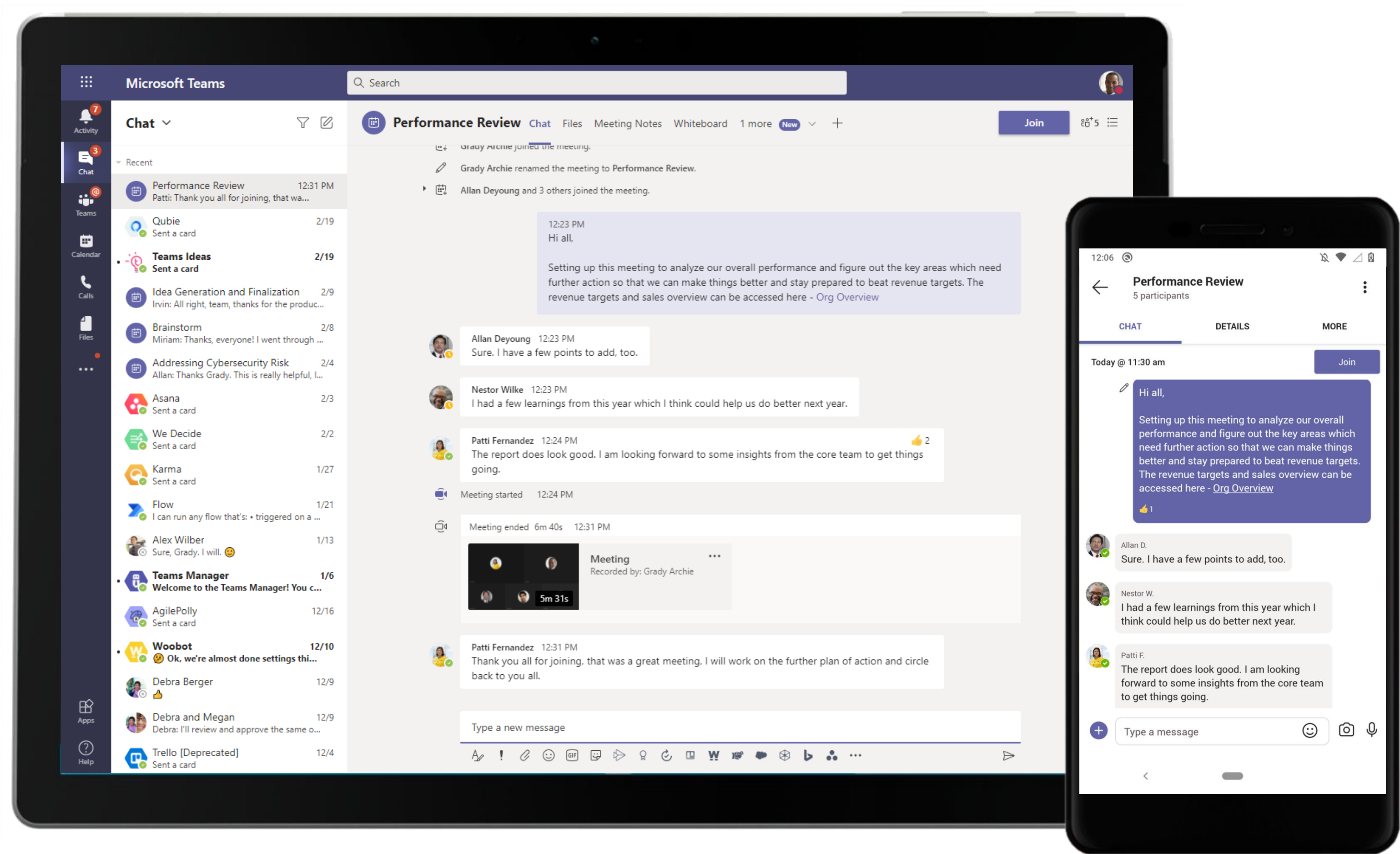
Any Teams meeting or call can be recorded to capture audio, video, and screen sharing activity. The recording happens in the cloud, and it is saved so you can share it across your organization.



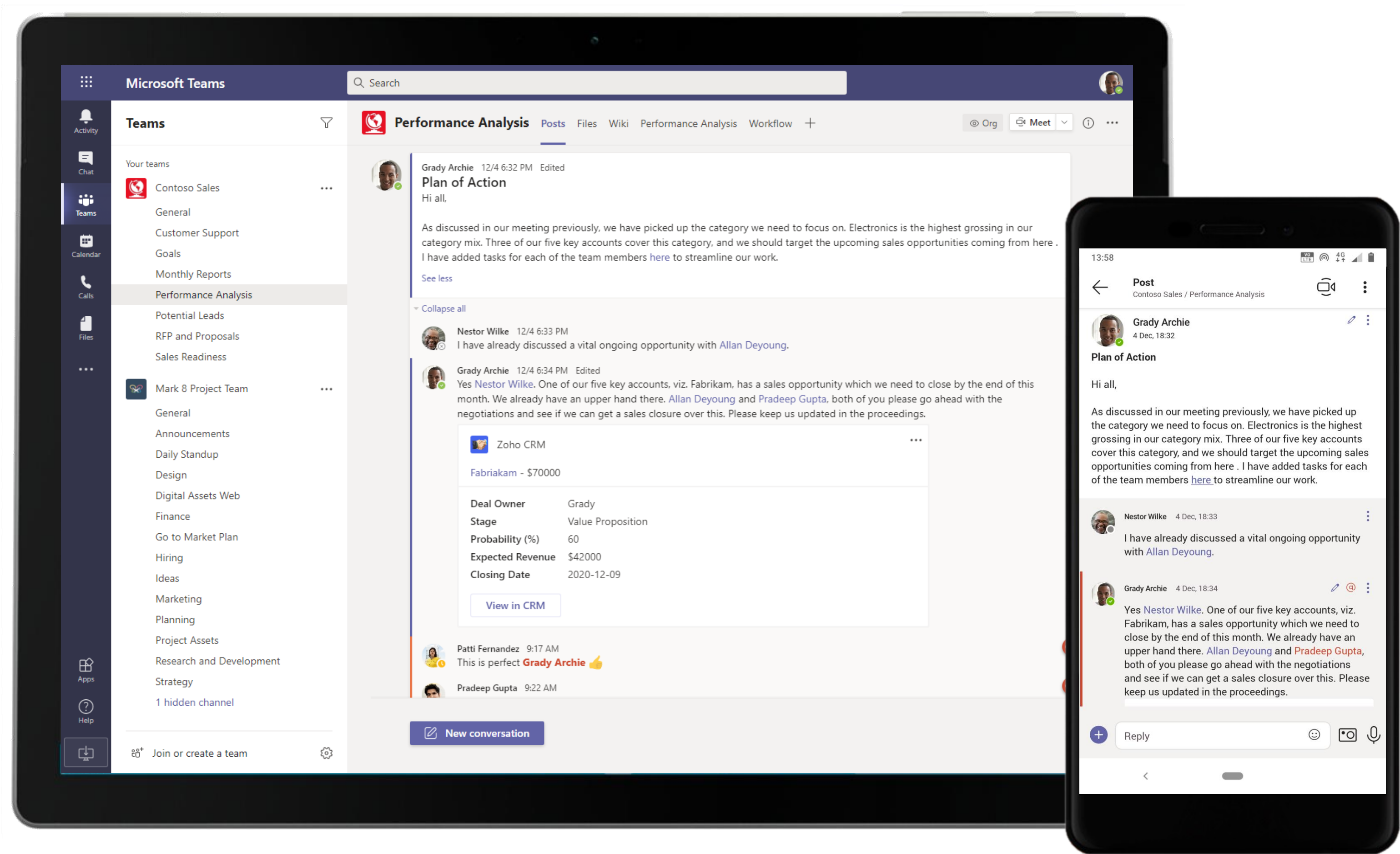
Facilitate data-driven decisions informed by visualizations and scoring in Power BI for Microsoft Teams. The Sales Lead analyzes the performance over the meeting using Power BI.



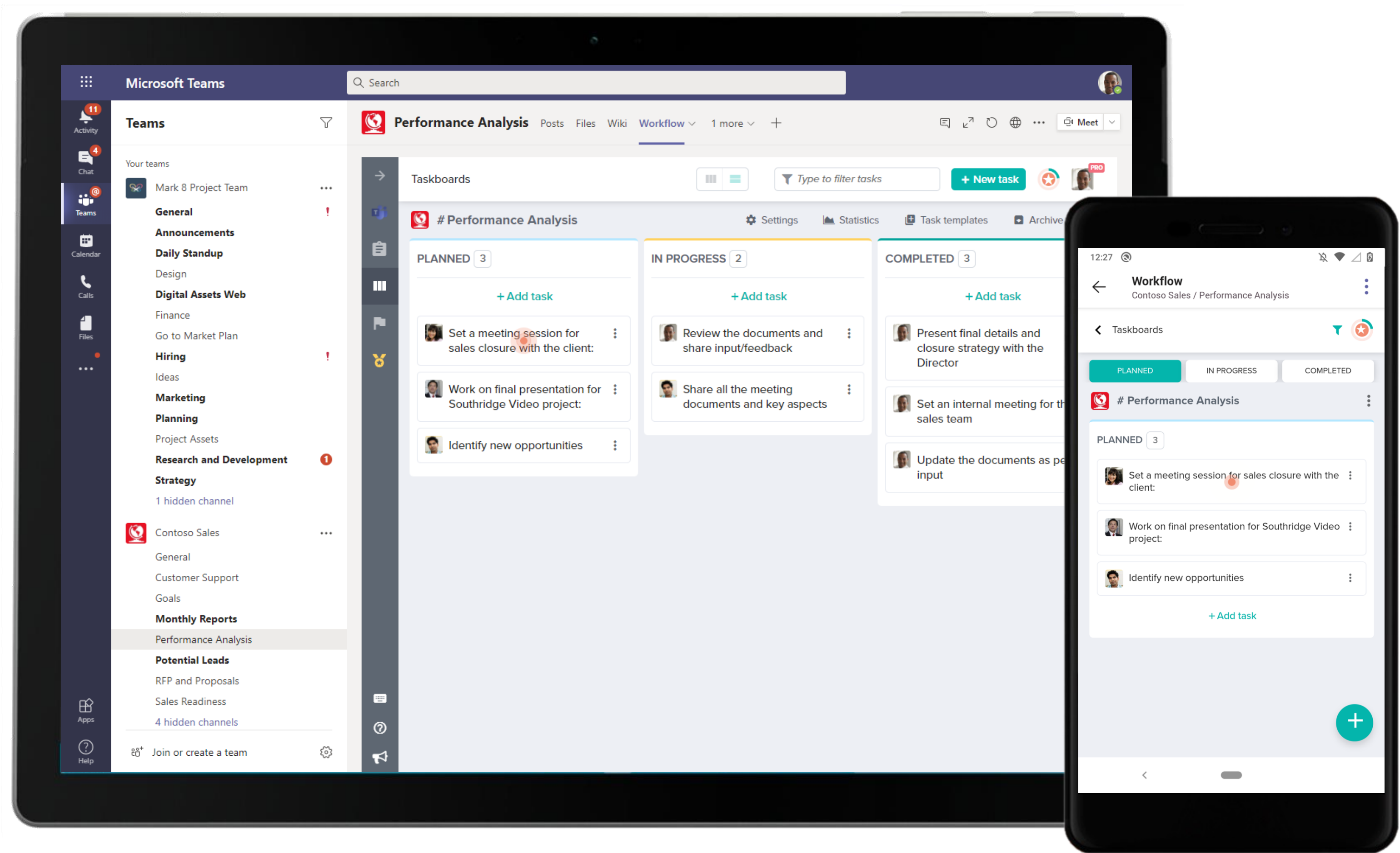
Manage your entire sales process from end to end with pipeline management, process automation, in-depth reporting, fine-tuned security settings and much more with Zoho CRM in Teams.



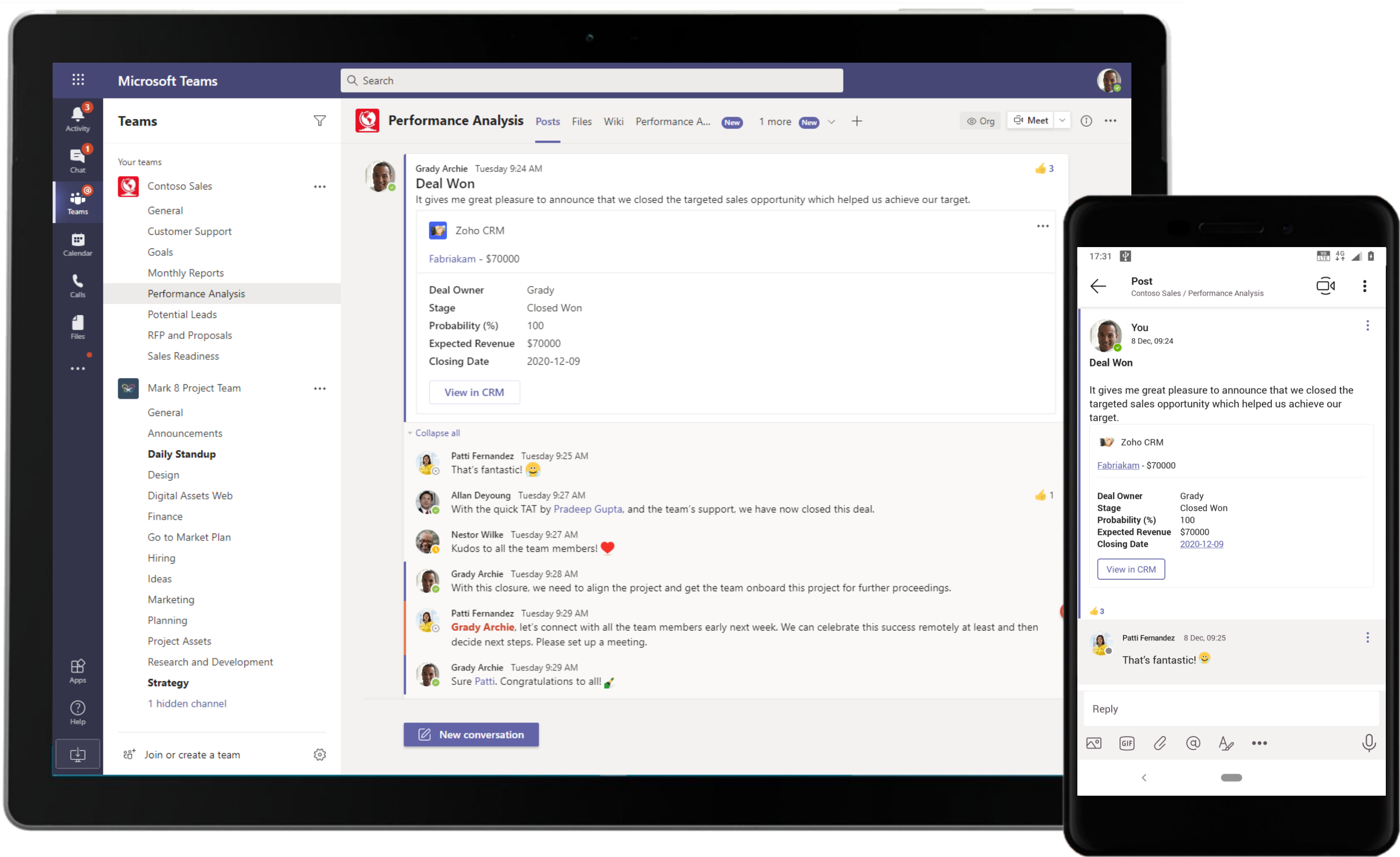
When the Sales Lead creates a meeting invite, he can also use the meeting chat feature to offer purpose of the meeting to the invitees. The attendees continue to interact on the same thread.



Bring in leads, nurture them through your pipeline and convert them into happy paying customers with Zoho CRM in Microsoft Teams.



Create tasks, add labels, assign teammates and manage your work in flexible Kanban boards with Workstreams.ai in Teams. The Sales Lead uses Workstreams.ai to assign tasks and view progress.



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



Visualize Trends Impacting Sales Forecasts

Sales Manager

Scenario Walkthrough

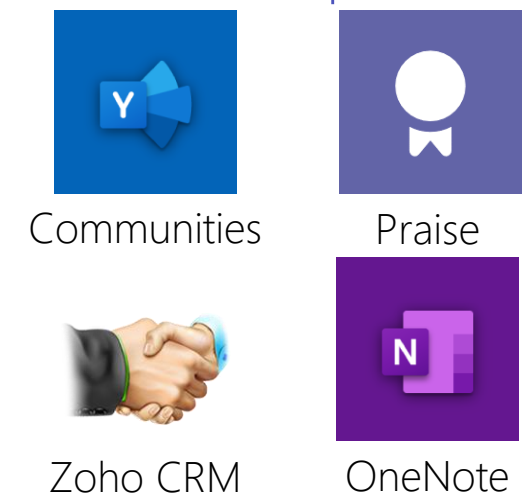
To make the most of the new opportunities, you need to analyze and glean insights from the client data. The Sales Manager notices a drop in leads generated and understands that this might be a hurdle in achieving the monthly targets. She quickly leverages powerful tools within the Teams ecosystem to communicate with her team and sets in motion a plan to help the team meet their targets.

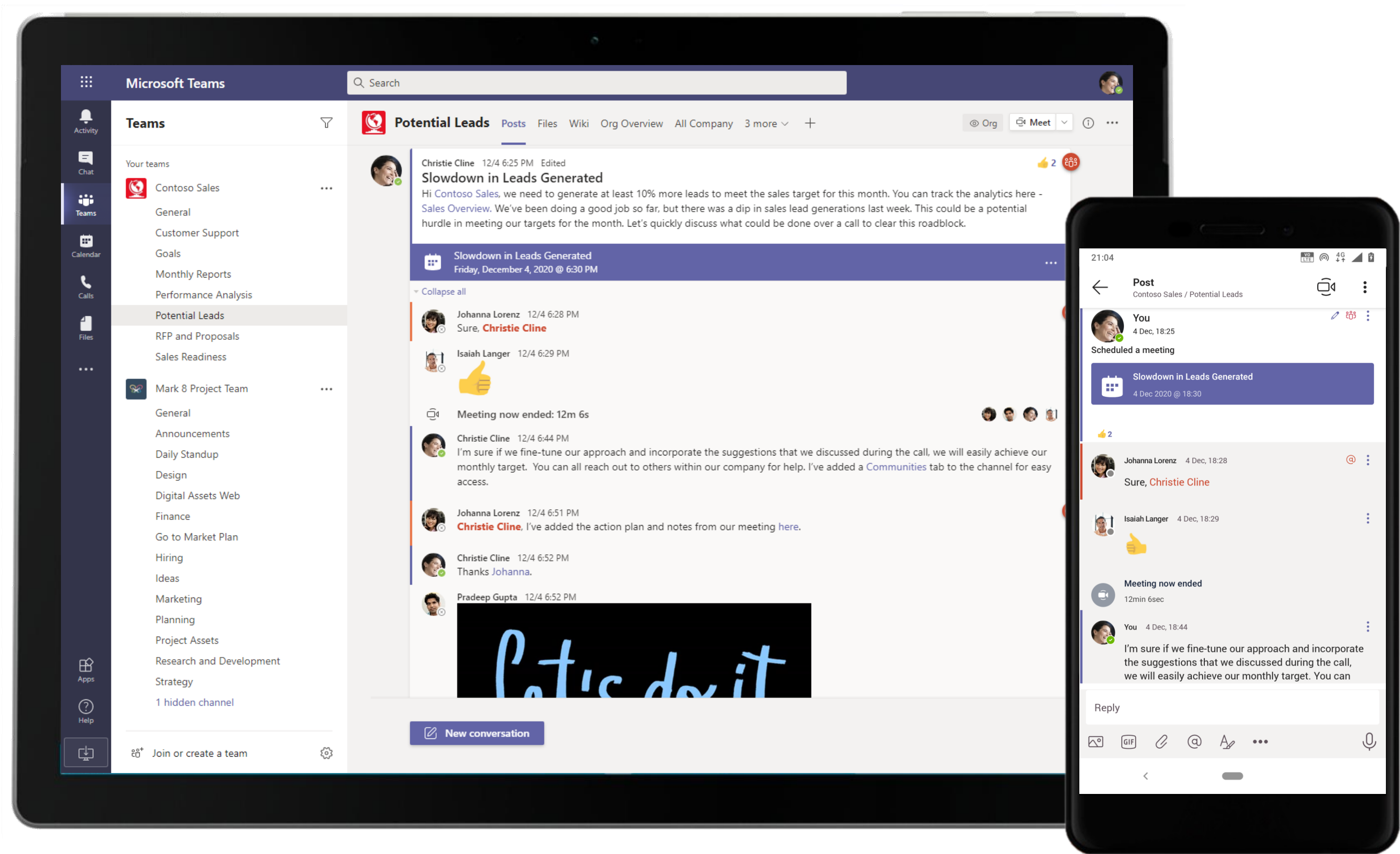
- Schedules a call with the team to discuss the need to generate more leads this week due to a slowdown via channel communications.
- Discusses sales trends for the week using Zoho CRM.
- Views the action plan and meetings notes shared within a OneNote tab.
- Views conversations taking place within the company social network about the new leads on Communities.
- Appreciates the team for their extraordinary efforts and for the quick rise in leads generated using Praise.

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

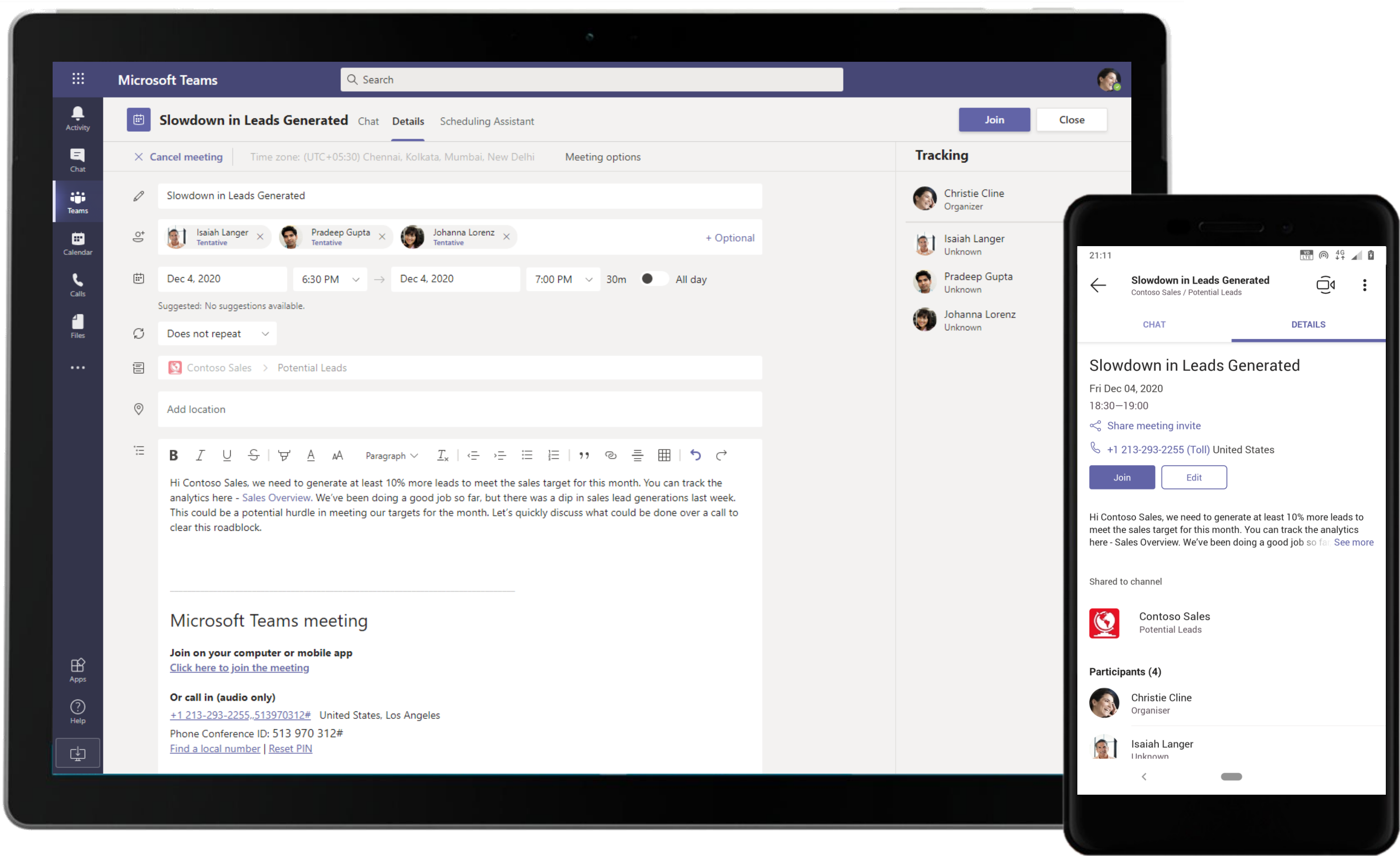
- Share vital CRM records and stay updated on critical sales metrics with Zoho CRM.
- Drive engagement in your organization through Yammer communities.
- Use OneNote notebooks to collaborate on digital content with your team.

Which app integrations on Teams made it possible?

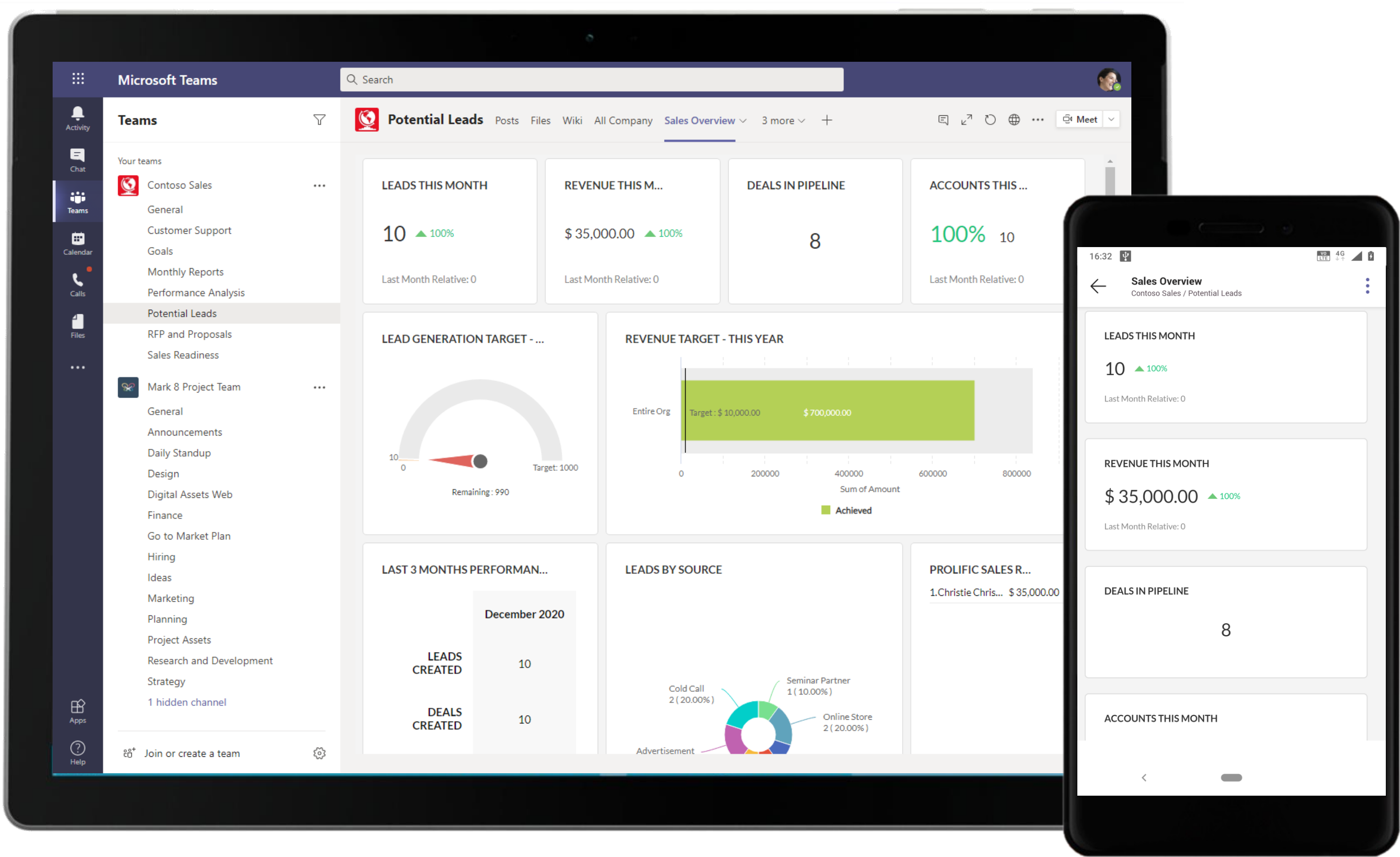




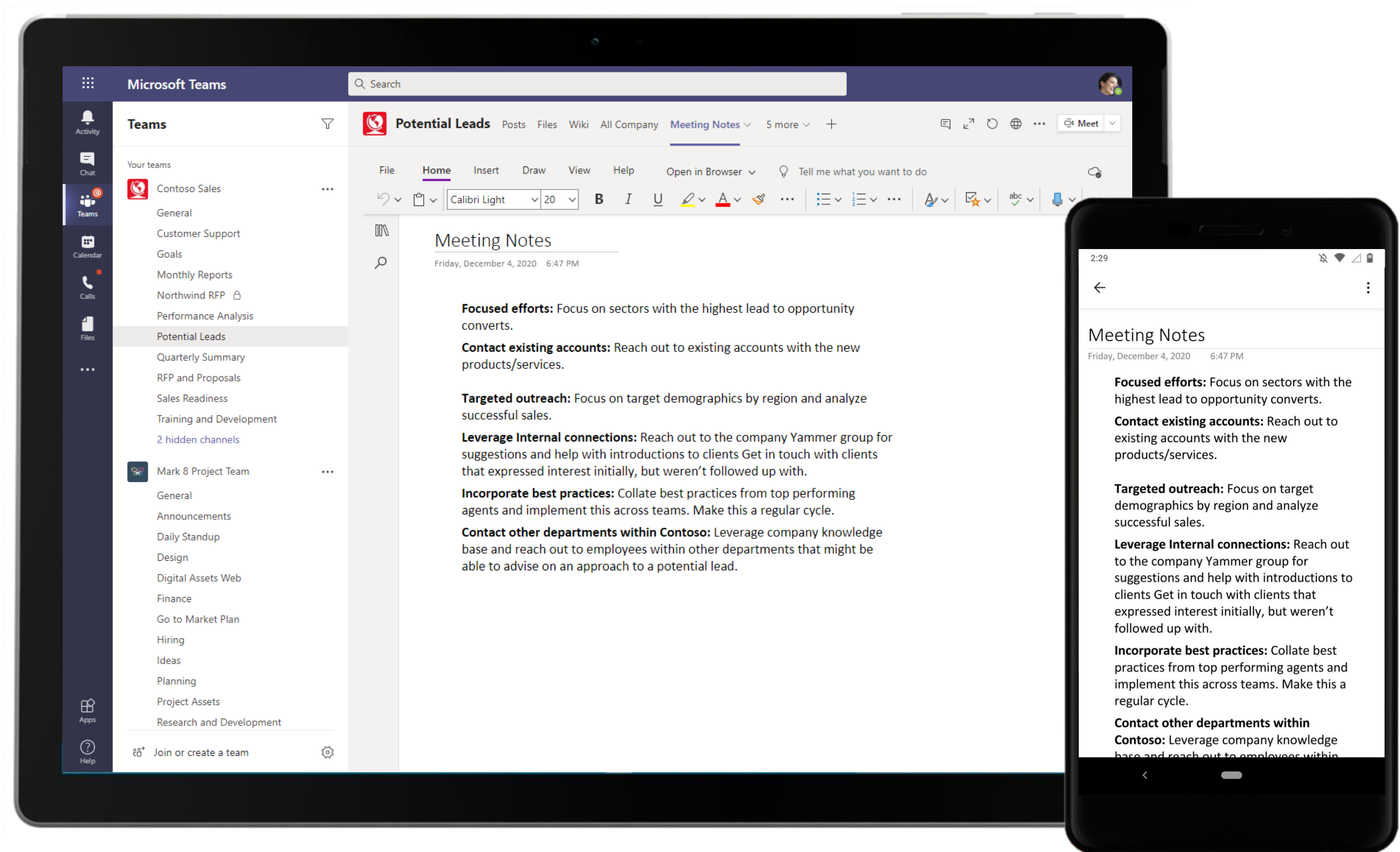
Collaborate with your team through channel communications using @mention to tag required personnel and keep conversations around the topic in a single thread. The team schedules meetings and shares files within the same thread too.



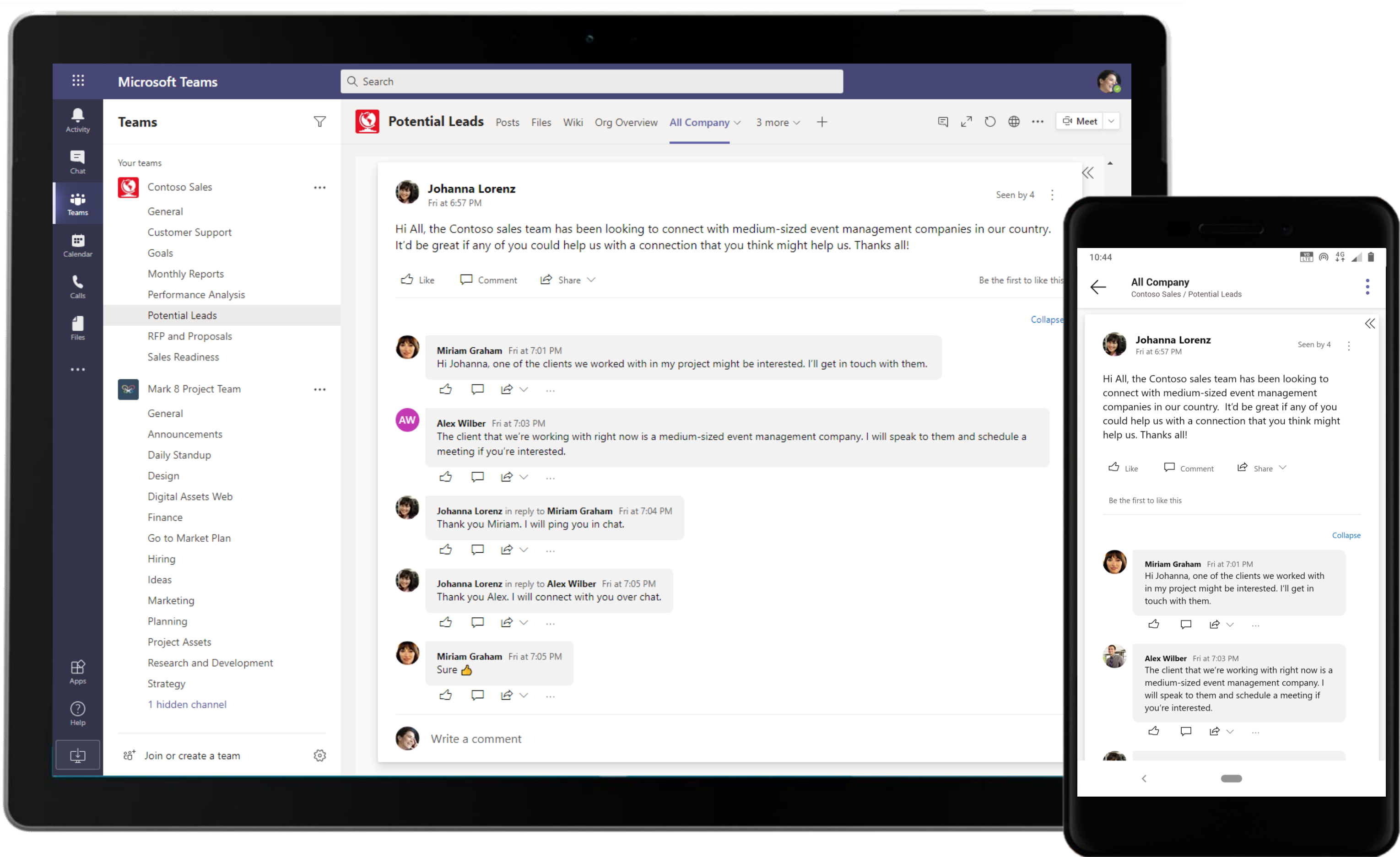
Meet with team members anywhere, anytime. When scheduling meetings, the Sales Manager uses the native scheduling calendar in Teams to find the best available time slots for meeting invitees.



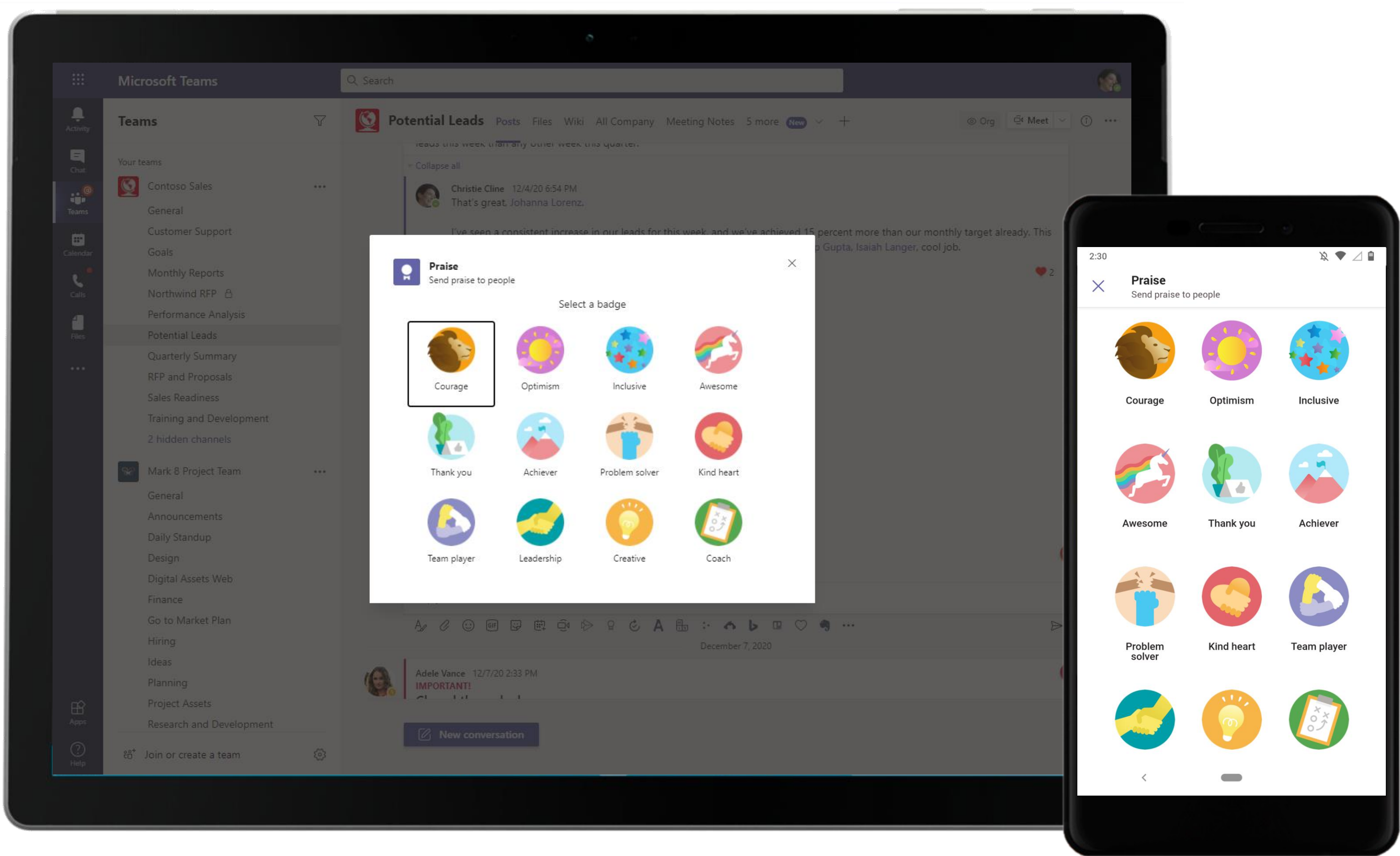
Keep track of leads, revenue, targets and other key sales metrics within your channel with Zoho CRM. The Sales Manager keeps track of team-wide sales metrics within the channel to take action and ensure that sales targets are met.



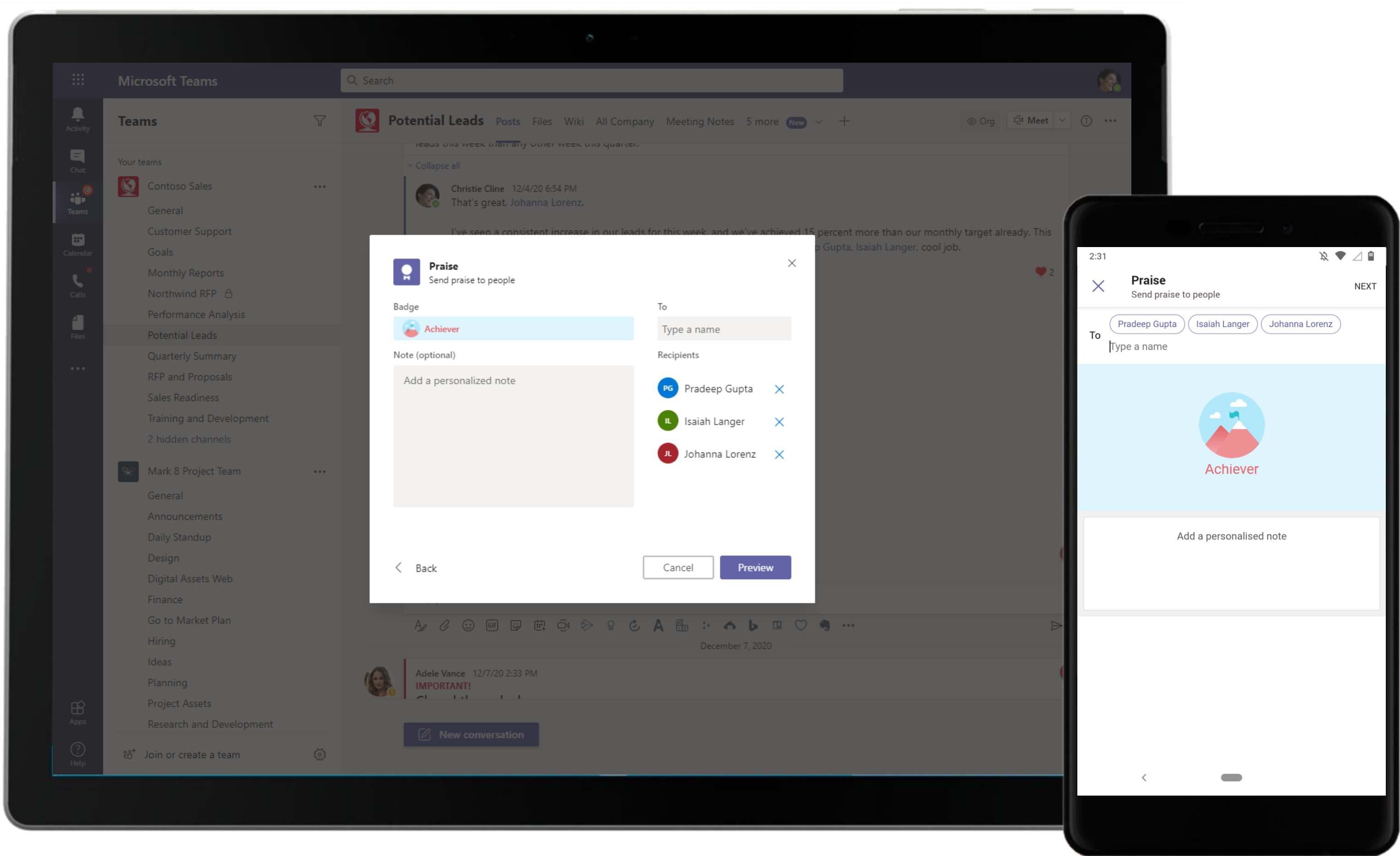
Record meeting notes or observations in OneNote app inside Teams and share them when needed with the team for their consumption.



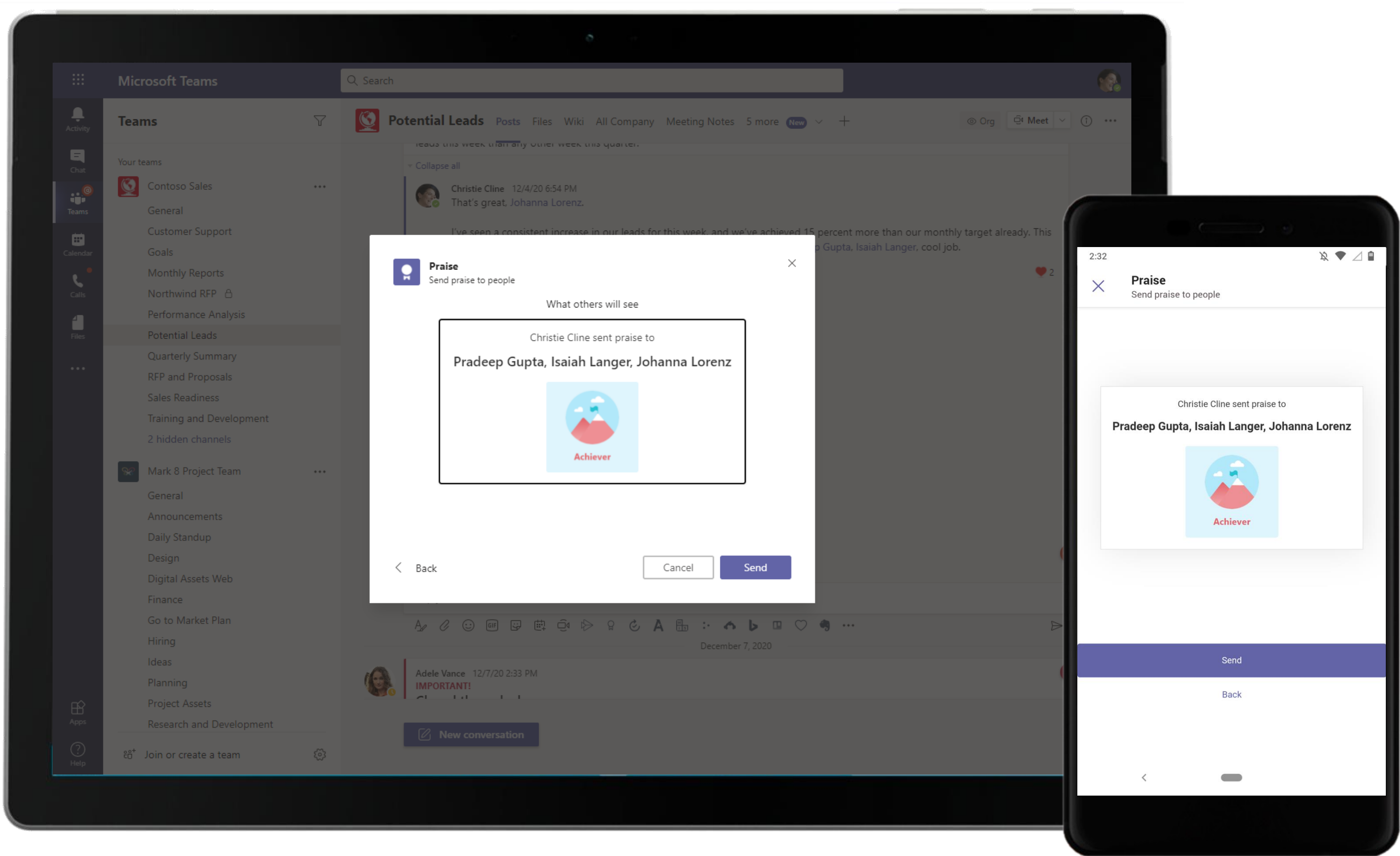
Communities enable people to share knowledge, ask questions, get answers, and build relationships across teams and organizational silos. The Sales Manager views conversations about the new leads on Communities.



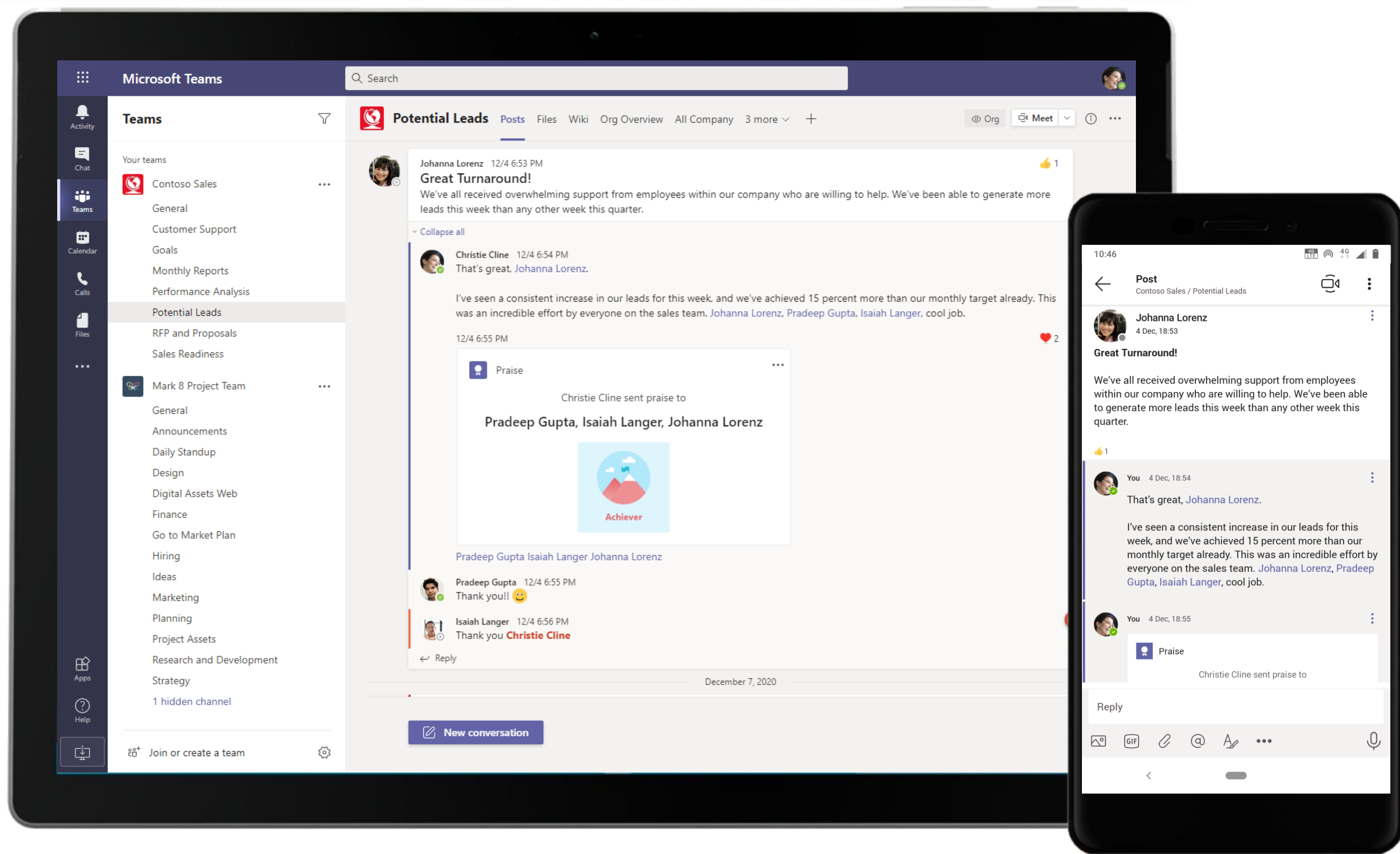
Send acclaim to your employees and co-workers with Praise. Choose a badge you want to award your colleague with, add the name of the people you want to praise and an optional description, select Preview. Once it's ready to go, click Send.



Add the name of the people you want to praise and an optional description, select Preview.



Once it's ready to go, click Send. The Sales Manager applauds the team effort via Praise.



People are happier and more productive when they get recognition for their efforts. The team is happy as their manager has praised their work.



Forecasting Sales and Analyzing Gaps

Sales Analyst

Scenario Walkthrough

There are often mismatches between the sales forecasts, predictions, and the outcome. The Sales Analyst must identify gaps and bridge them to be sure they are not missing business opportunities. See how Microsoft Teams works as a communication platform for seamless execution of this activity.

- Creates a channel for the purpose within the sales team and sends a message highlighting the purpose of the team.
- Sends out a meeting invite to discuss forecasts, actual outcome, and share meeting agenda using Decisions.
- Uses Tasks by Planner and To Do 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 Power BI for ease of data consumption.
- Shares a presentation using PowerPoint showing the customer demography research.

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

- Manage your meetings and share meeting agenda beforehand with Decisions.
- Assign tasks to team members with transparency using Tasks by Planner and To.
- Build reports and documents online in the cloud with ease using Excel.
- Turn complex data into powerful, visual graphics to make informed and data-driven decisions using Power BI within a channel.
- Create and design your presentations instantly with minimal effort using PowerPoint.

Which app integrations on Teams made it possible?



Excel



Power BI



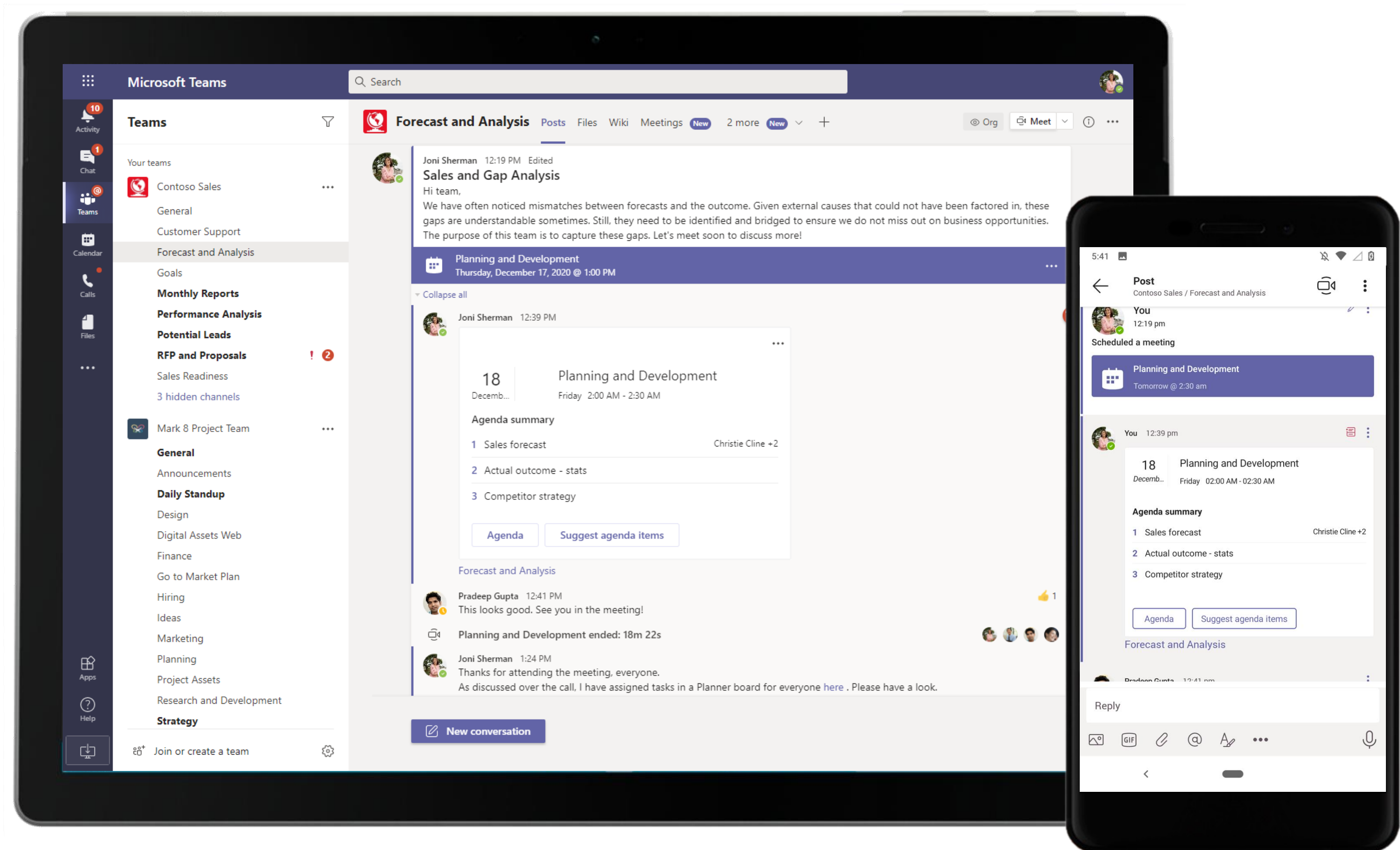
PowerPoint



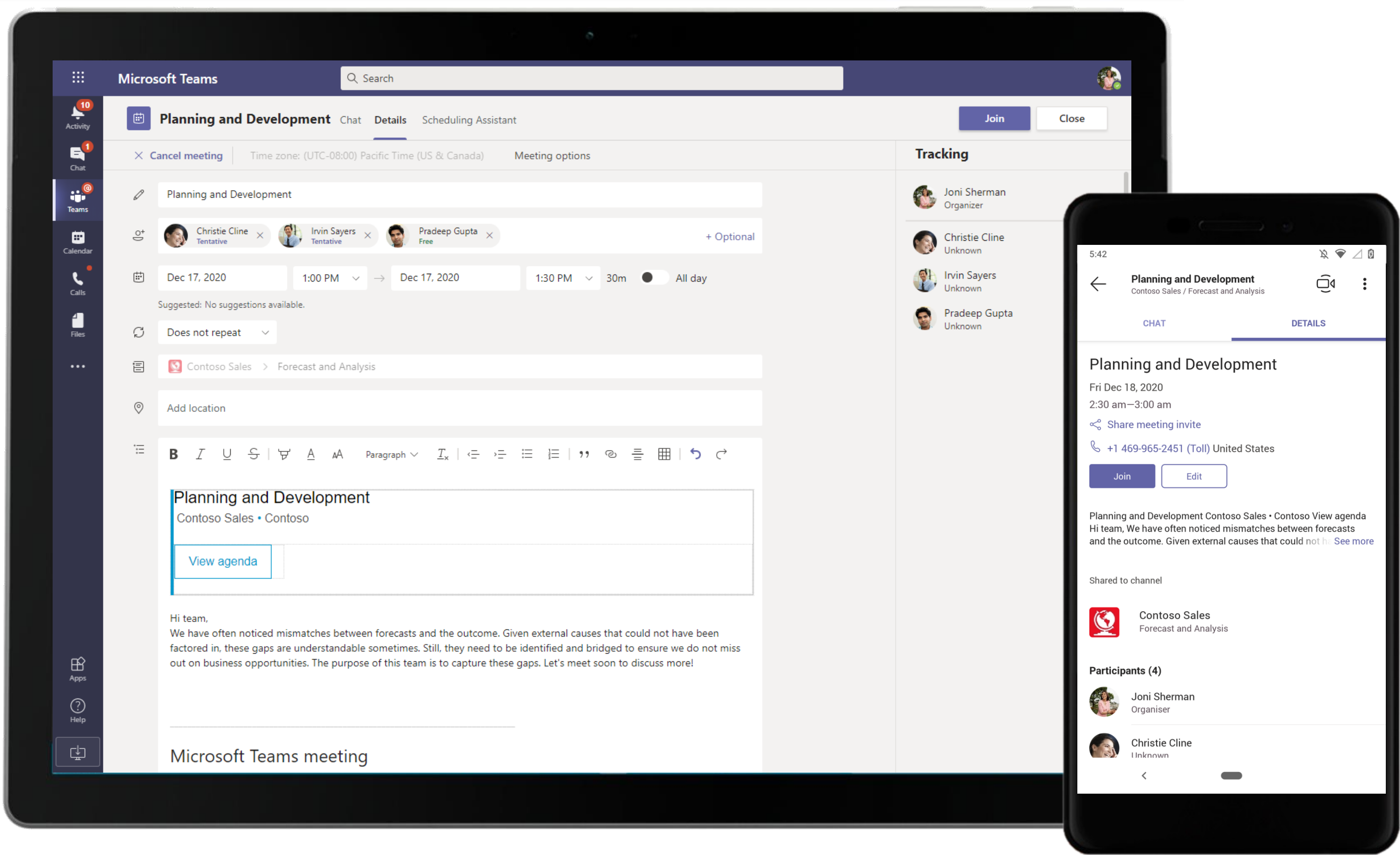
Tasks by Planner
and To Do



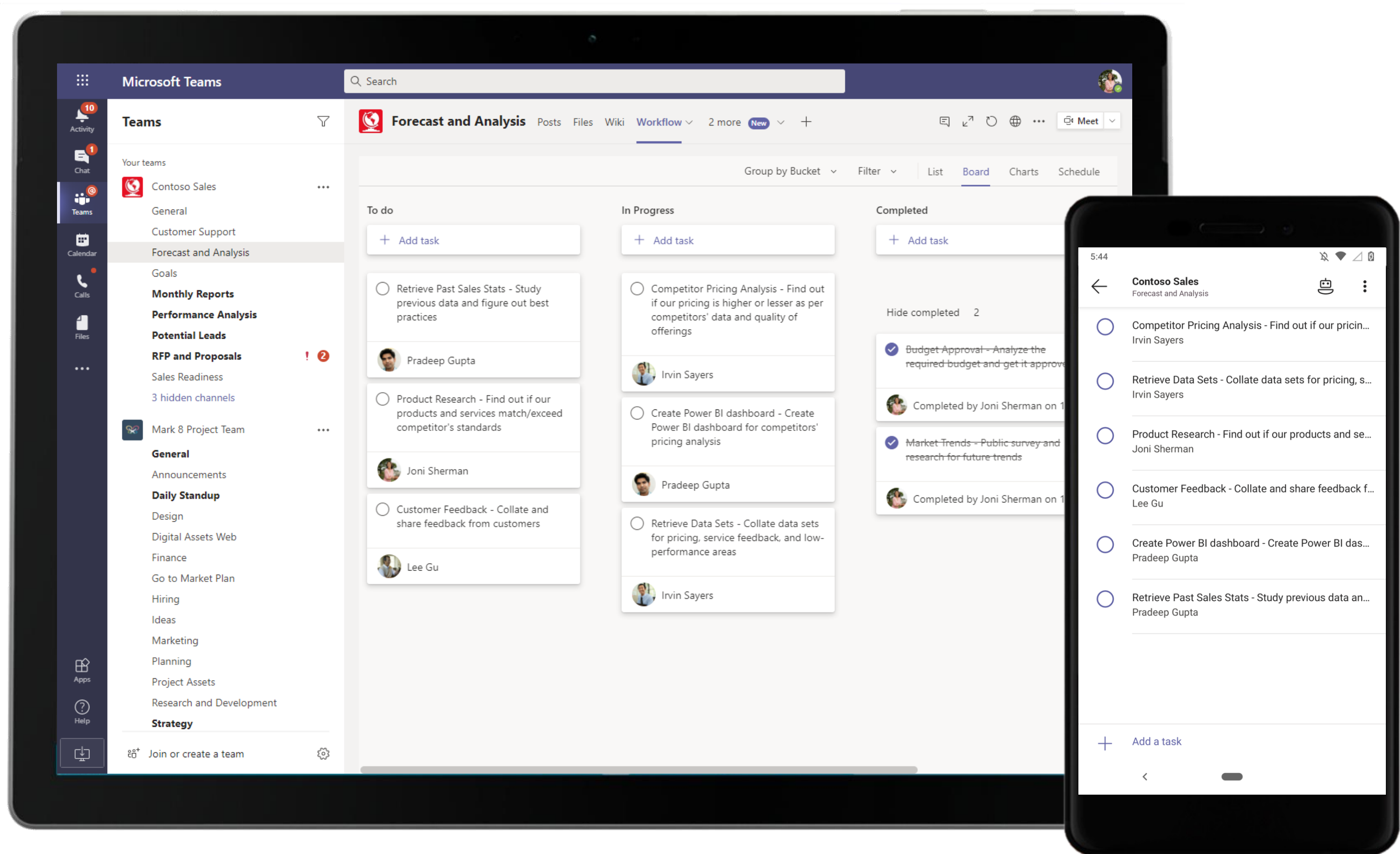
Decisions



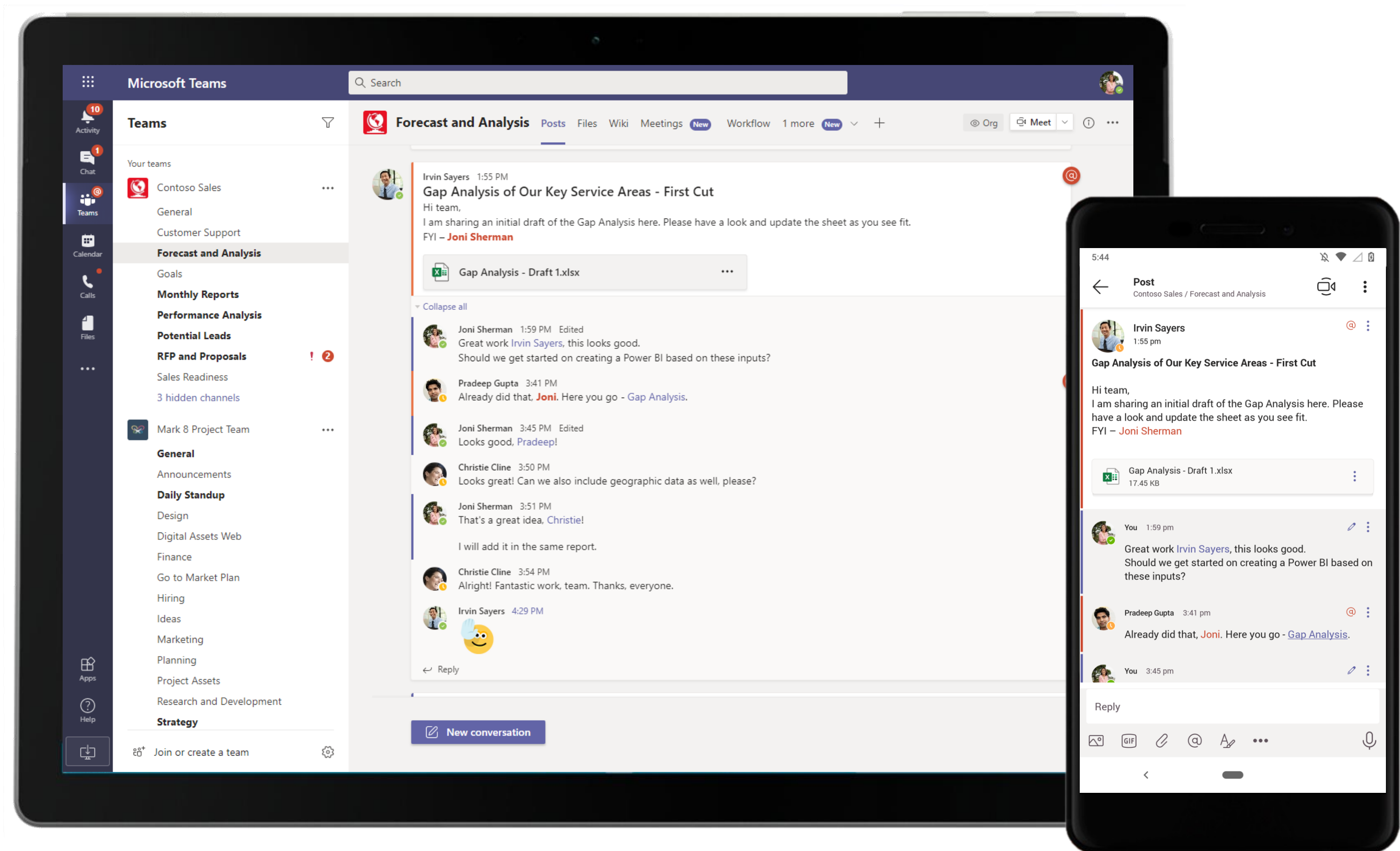
Teams and channels are where you hold meetings, have conversations and work on files together with team members. The Sales Analyst schedules a channel meeting and shares the meeting agenda using Decisions.



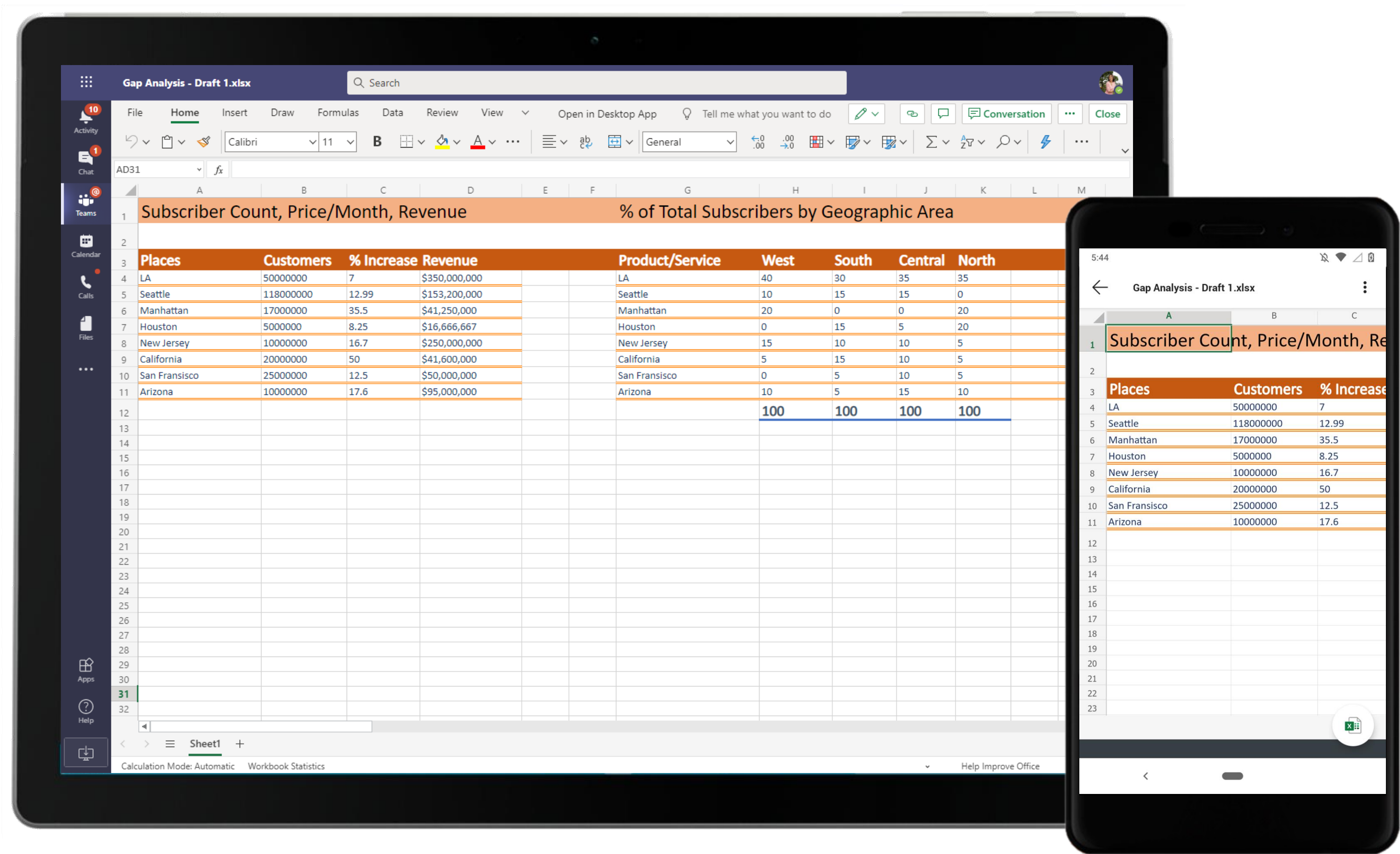
The Sales Analyst sends a welcome message highlighting the purpose of the team and creates a meeting invite along with an agenda to bring everyone together in a kick-off conversation.



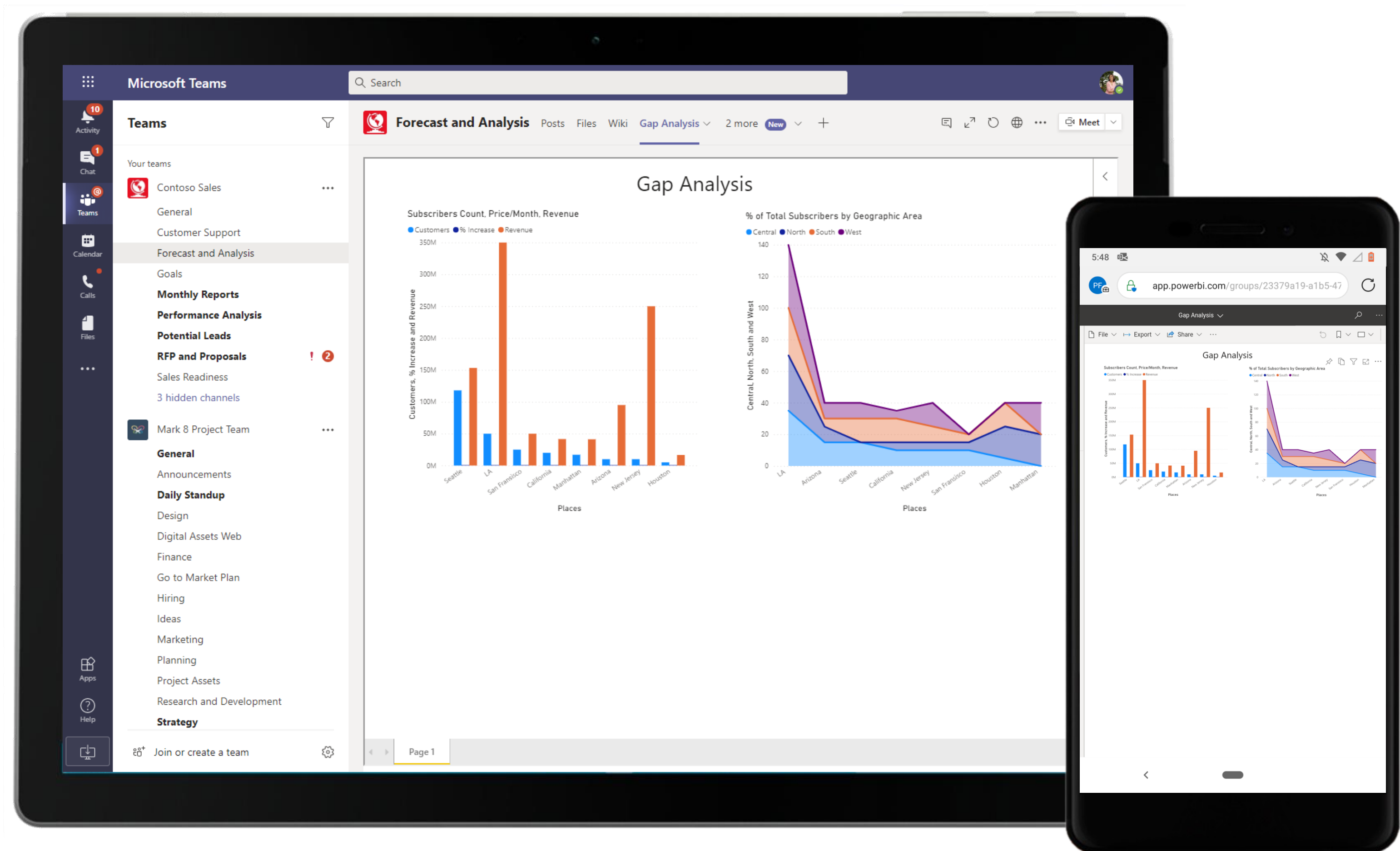
The deeply integrated Tasks by Planner and To Do within Microsoft Teams enables speedy plan mobilization using task assignment and delegation. The Sales Manager can organize and track tasks with the Tasks by Planner and To Do tab in any channel in Microsoft Teams.



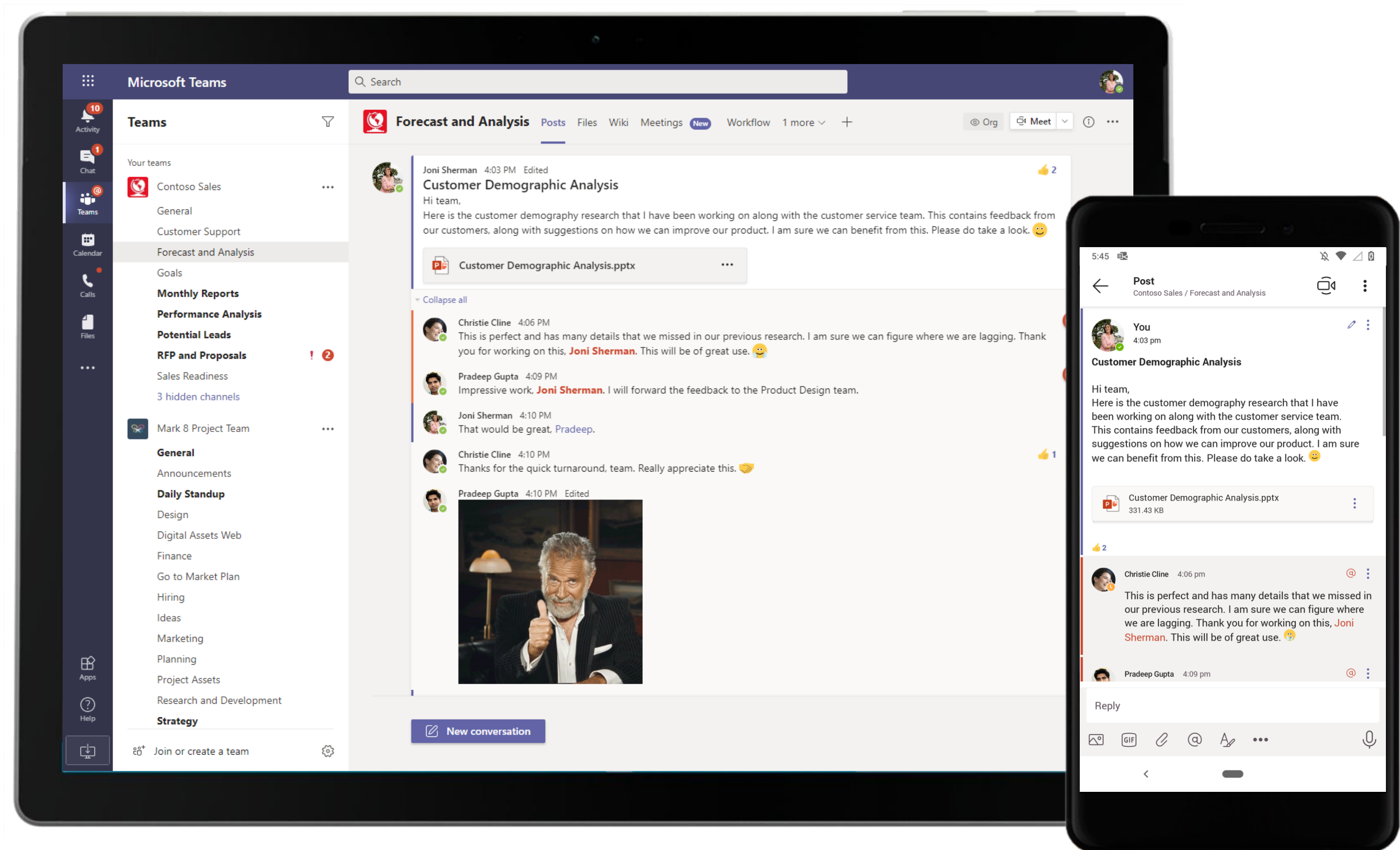
The Sales Analyst uses Excel in Teams to create a Gap Analysis and uploads it to the Files tab in the channel for peer review. The spreadsheet can be pinned as a tab for quick access, while any edits to the file can be carried out with ease.



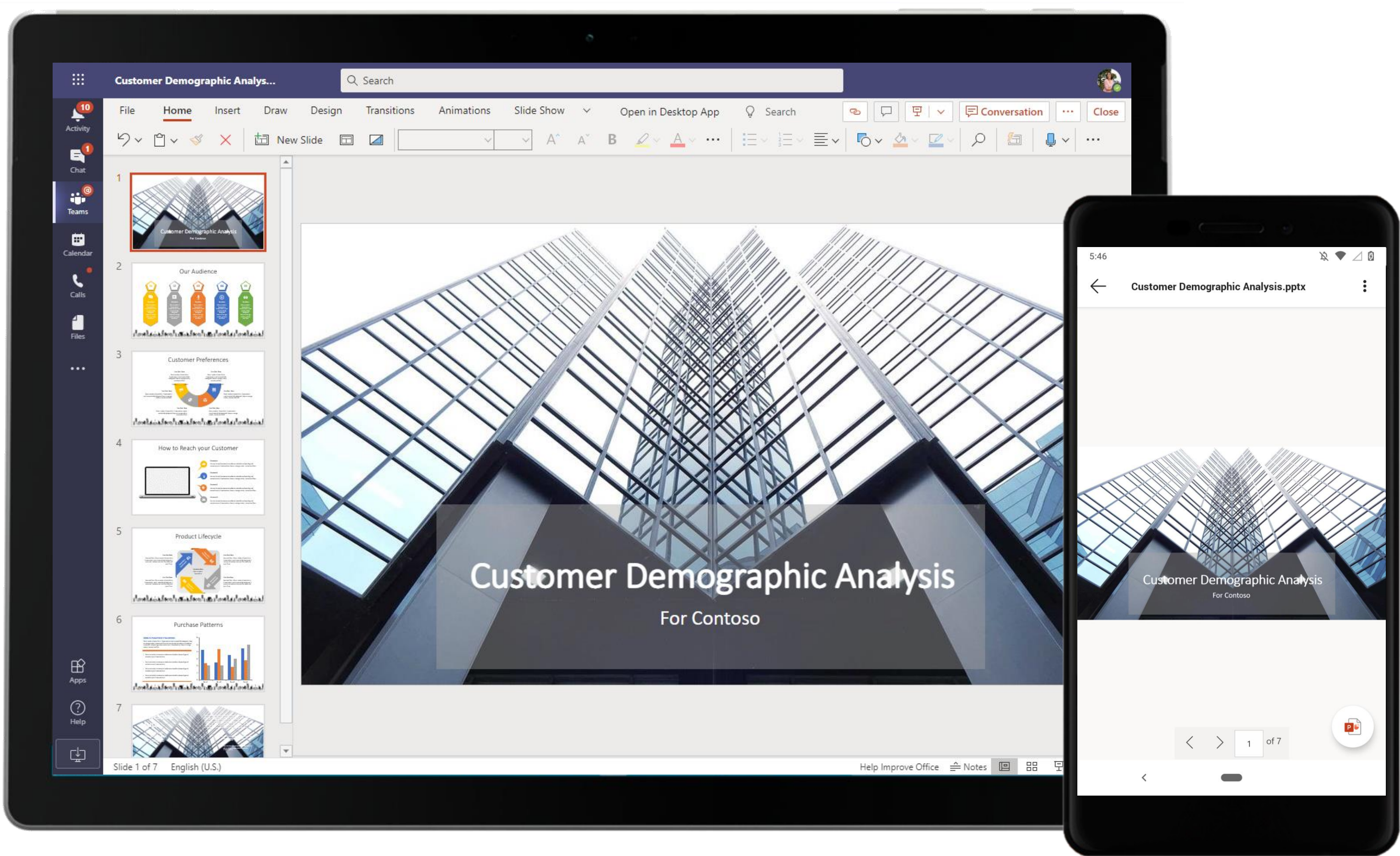
Use Excel’s analytical abilities within Teams to build reports and share them with your team. The full canvas of Excel along with all controls are available to be leveraged right within Teams.



Build dynamic data visualizations, measure metrics, and track analytics through Power BI within Teams. The Sales Analyst can dive into this wealth of analytical data shared using Power BI.



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



Utilize PowerPoint to draft and present an effective and easily consumable presentation for the team.



Bridge the Gap Between Sales and Marketing

Sales Lead

Scenario Walkthrough

Sales and Marketing teams can be siloed and often face roadblocks in communicating their objectives, engines, metrics, and customer feedback. A partnership between the two is crucial to any business, and neither team can reach its goals without the other. See how the Sales Manager combines a set of applications right inside Microsoft Teams and gets both teams to collaborate with ease.

- Sets up a meeting and invites the key members from the Sales and Marketing teams.
- Uses virtual breakout rooms to group the meeting attendees into virtual rooms to foster collaboration.
- Utilizes Ment.io to kick-off a new discussion for collaboration of both the teams.
- Shares a contact within the channel using Salesforce and encourages other team members to do so.
- Adds a Teams Ideas tab and asks the team members to share their ideas on cross-selling.
- Closes the discussion by informing the team that this activity will be reviewed every month.

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

- Collaborate with your team to promote engagement with structured discussions and make strategic decisions with Ment.io.
- Share contacts and communicate with your team members within Teams using Salesforce.
- Collaborate on ideas to promote them and recognize participation with Teams Ideas.

Which app integrations on Teams made it possible?



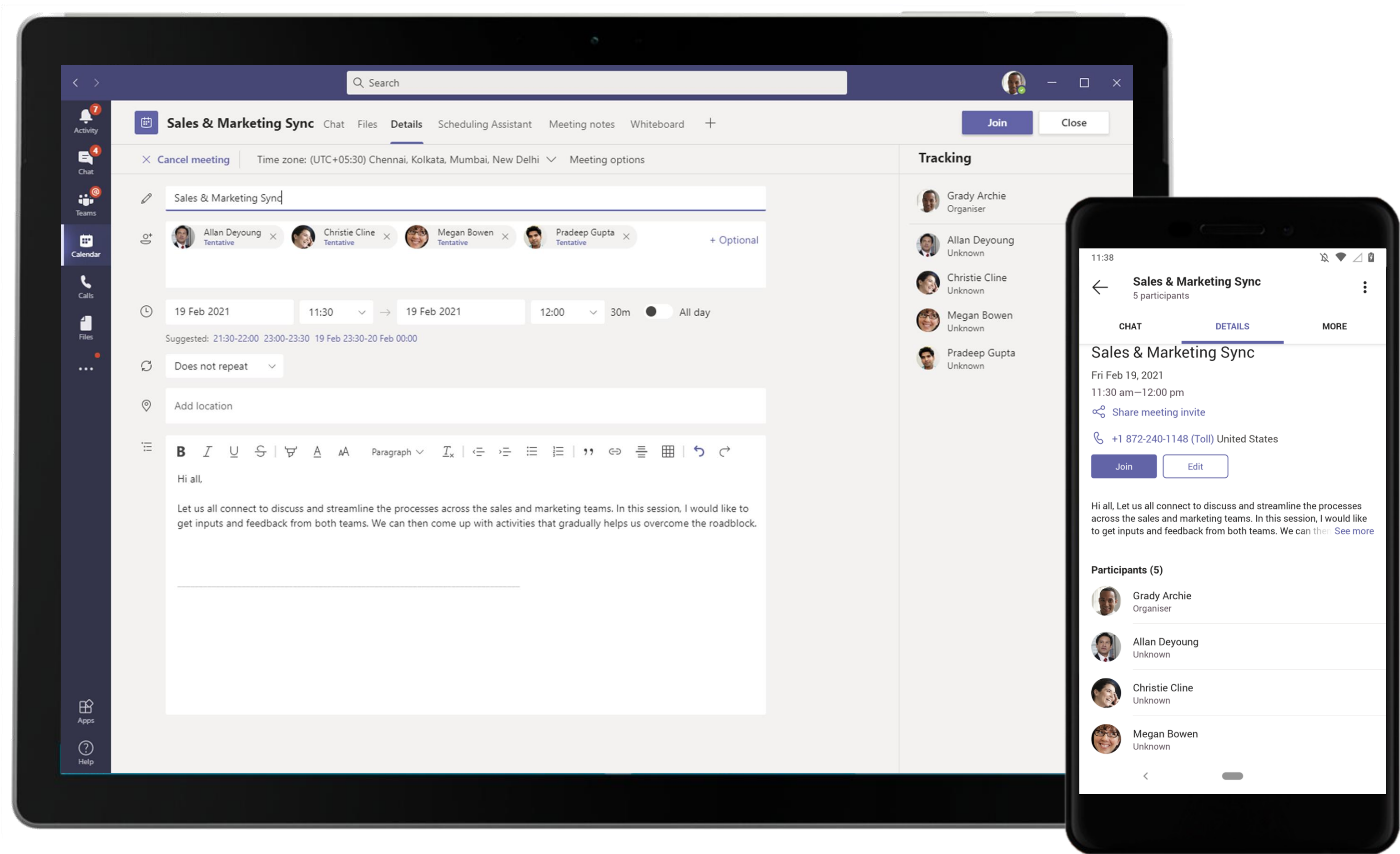
Ment.io



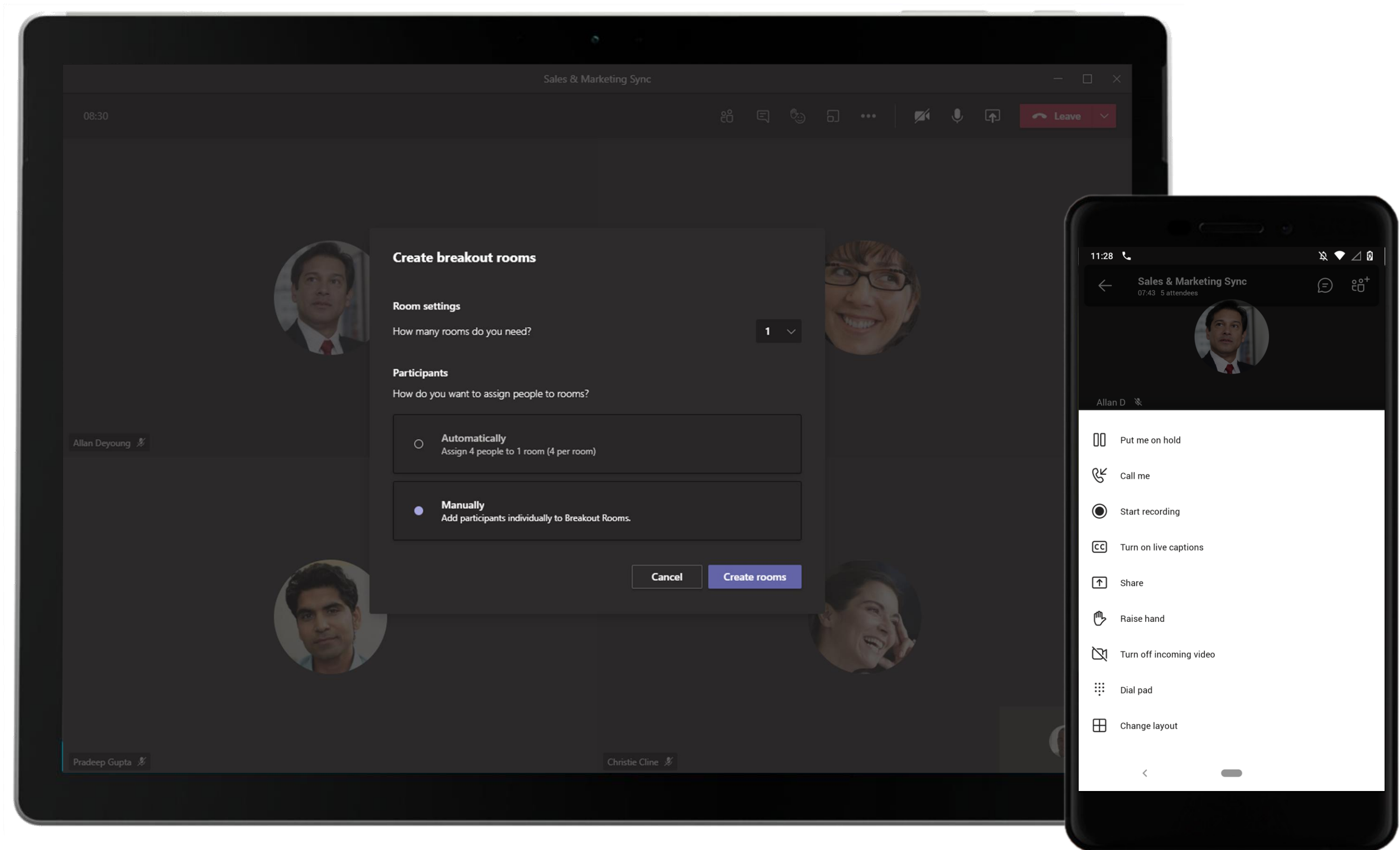
Salesforce



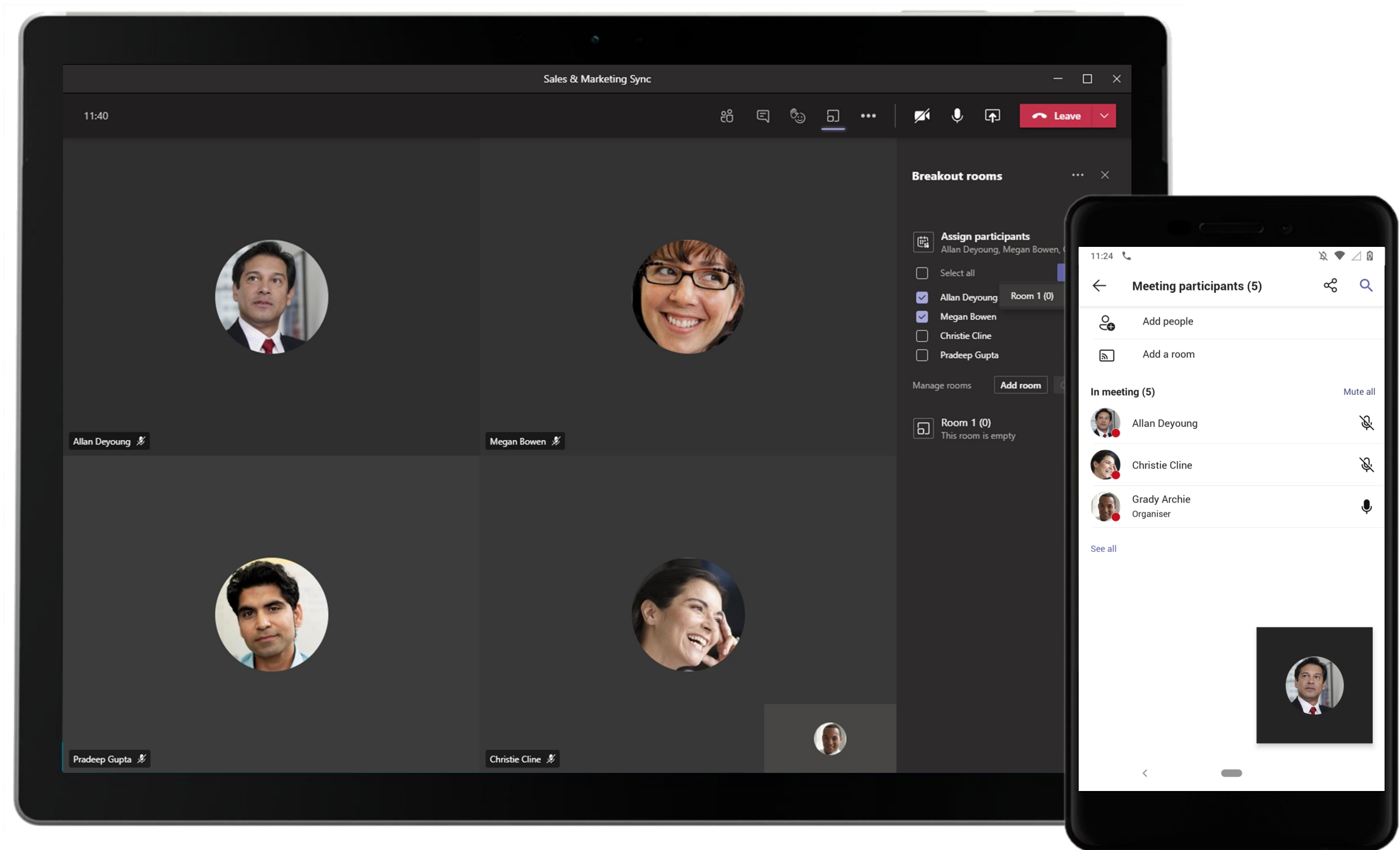
Teams Ideas



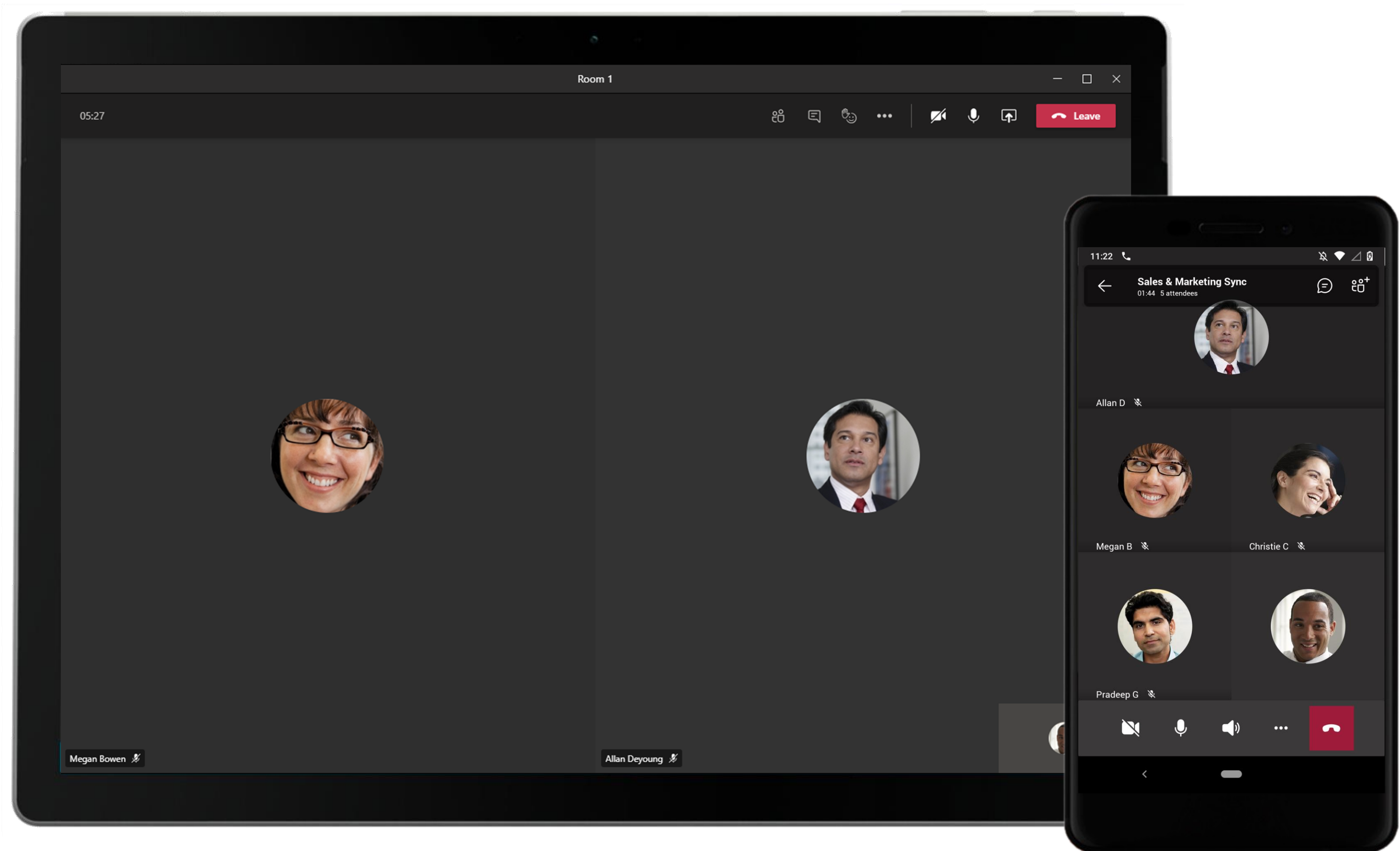
Schedule meetings, add a meeting description, configure meeting tabs and send meeting invites to collaborate with co-workers over a call right within Microsoft Teams.



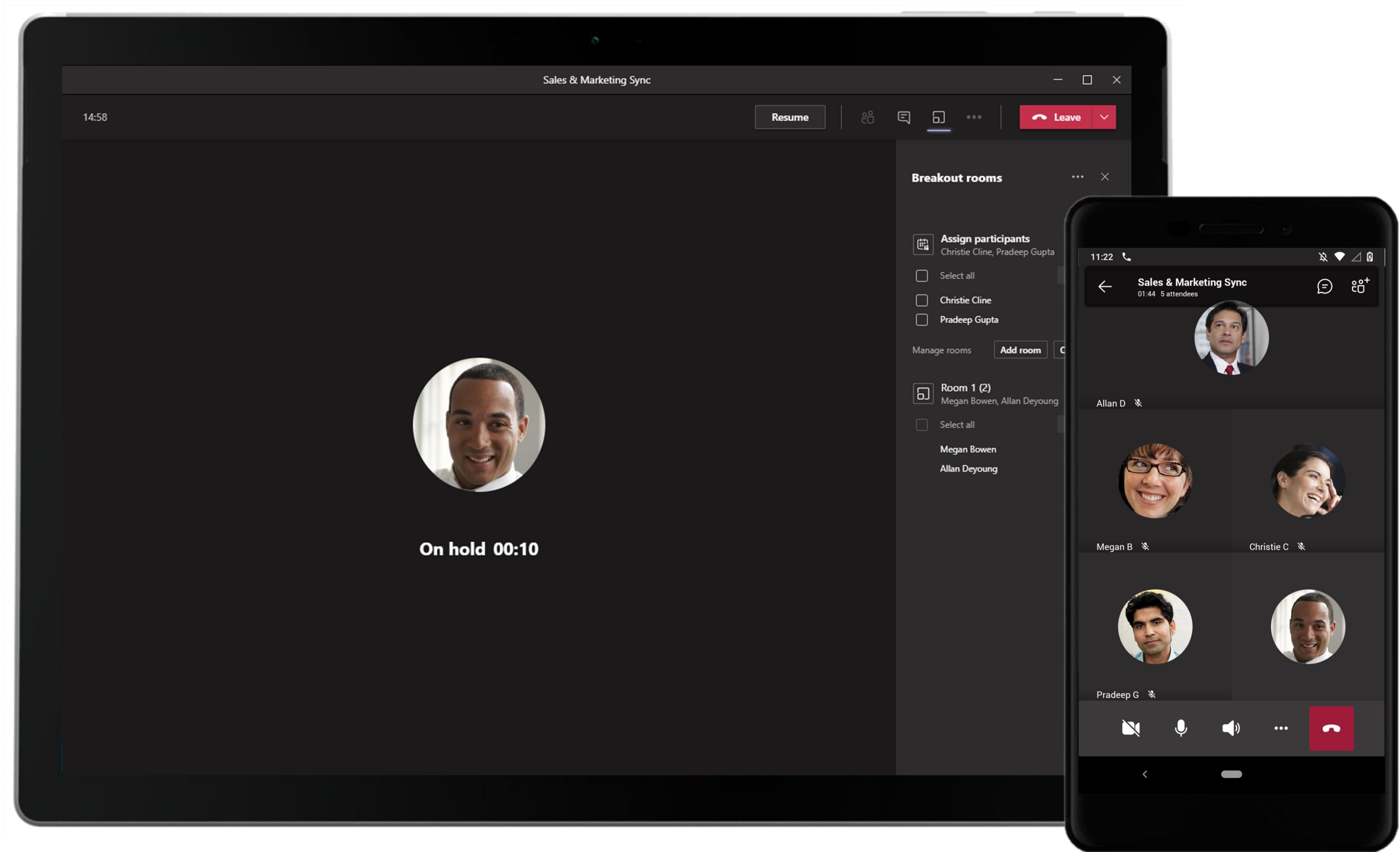
Organizers can choose to manually assign participants to the breakout rooms or let Teams auto assign participants to breakout rooms. Organizers can also specify the number of breakout rooms they need for the meeting.



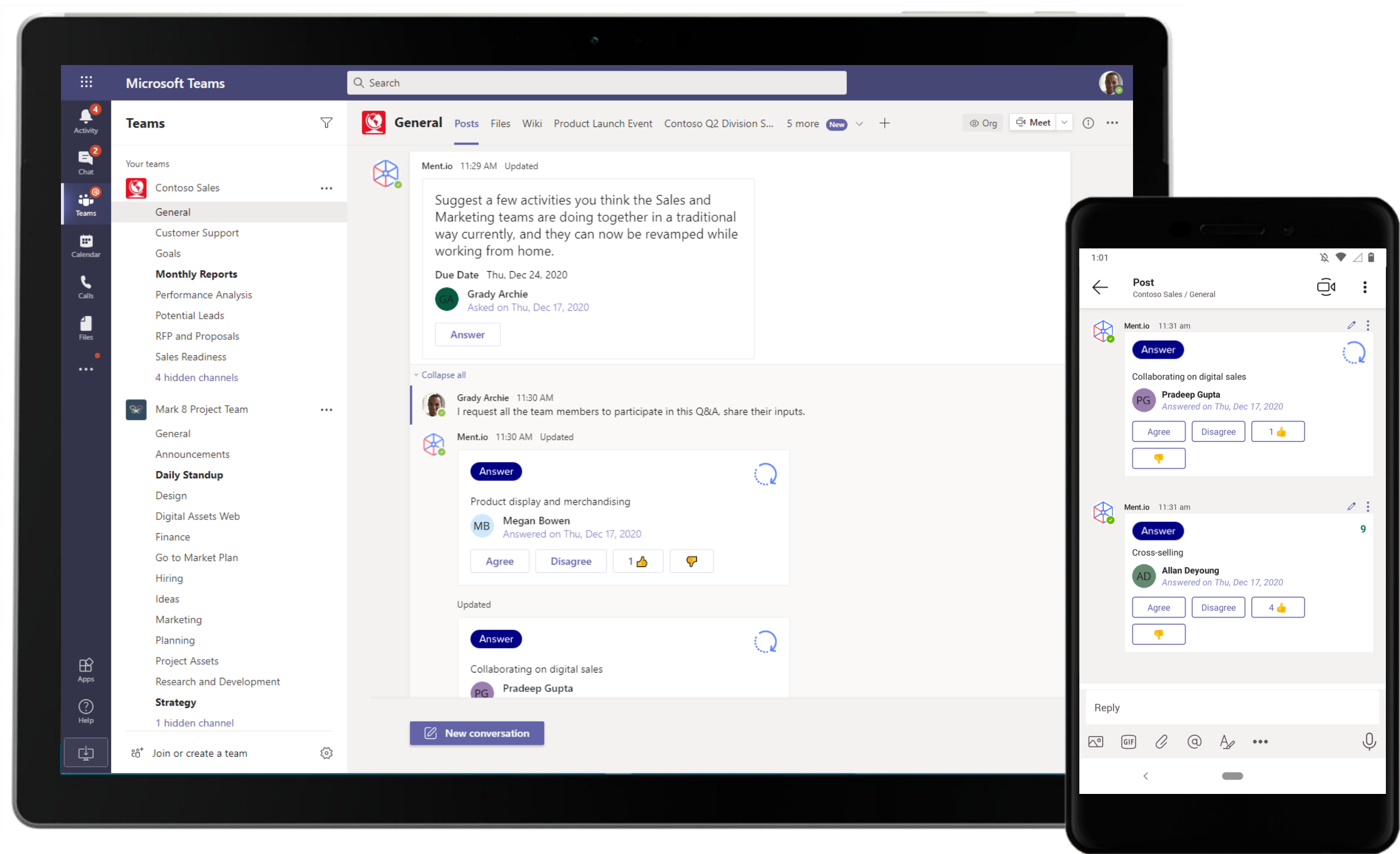
Breakout rooms allow meeting organizers to divide the meeting into sub-groups to facilitate discussions and brainstorming sessions. This allows for greater flexibility during meetings and participants can clarify questions without disturbing the breakout rooms sessions.



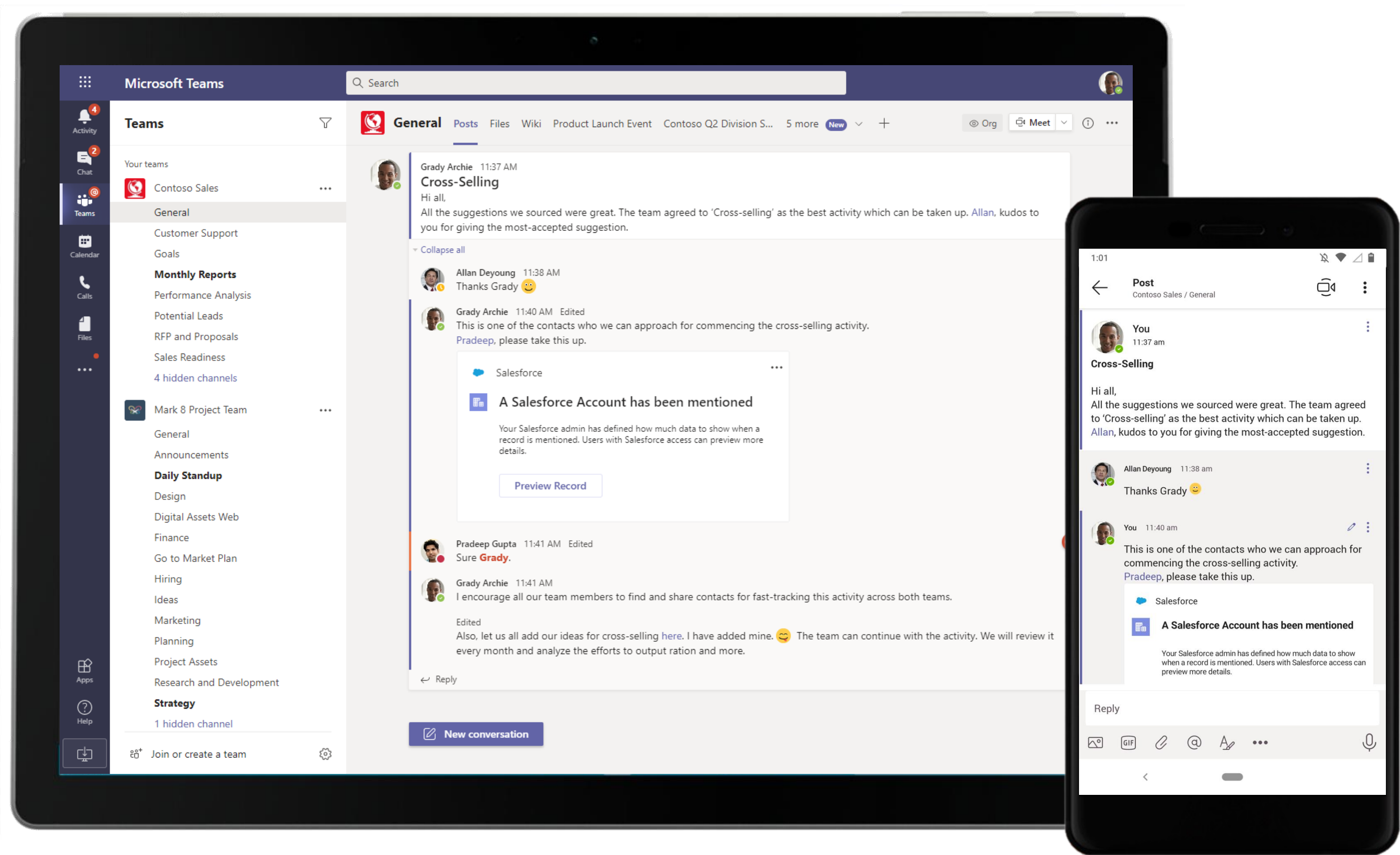
Participants added to breakout rooms and communicate with other to brainstorm ideas and engage in discussions without disturbing the main meeting call.



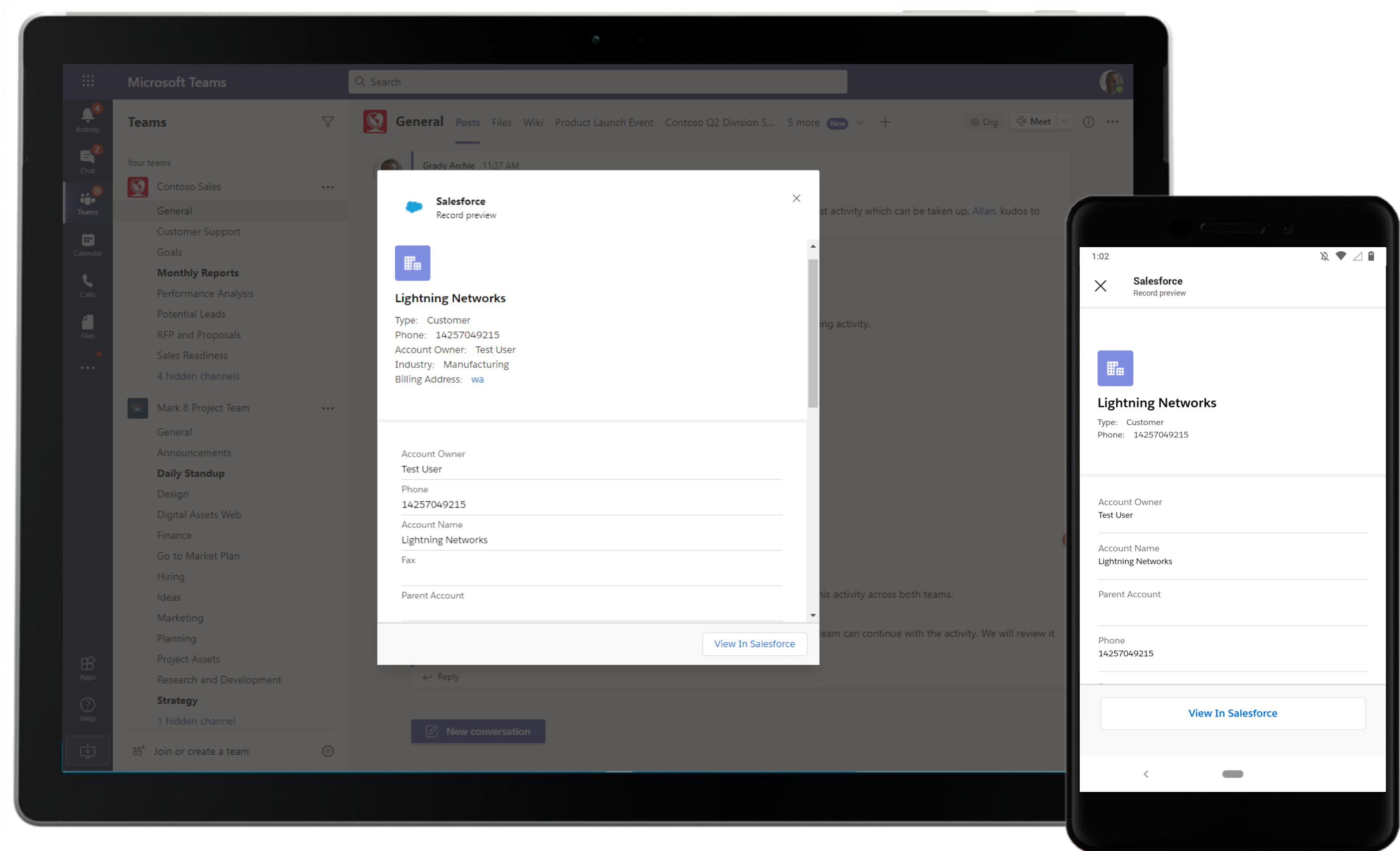
Organizers can choose to add more meeting rooms or participants to the meeting room based on the number of participants. The main meeting call is not disturbed by discussions that take place in the meeting rooms.



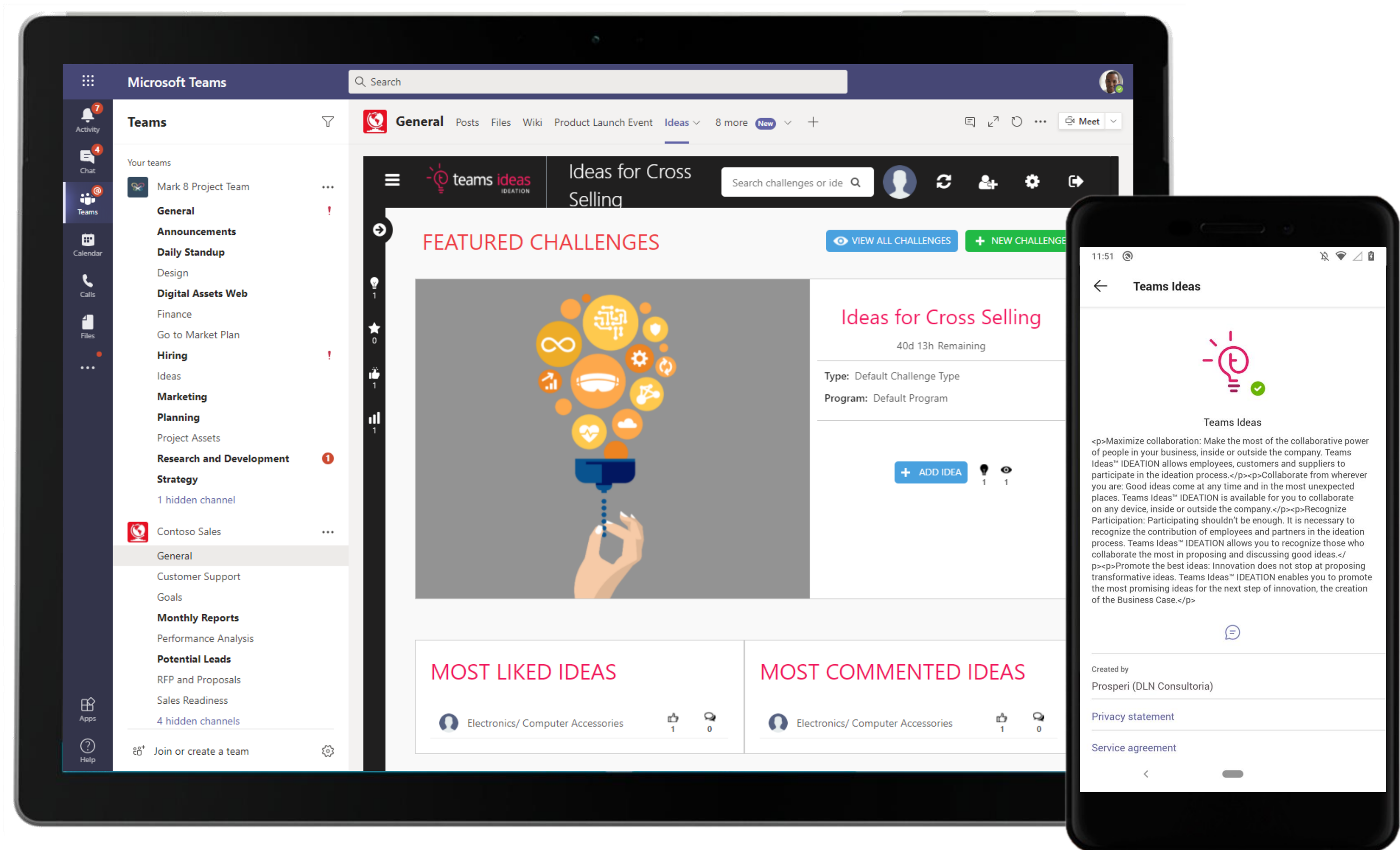
Ment.io in Teams allows you to collaborate with your team regarding strategic questions with polls and discussions. The Sales Lead utilizes Ment.io to collaborate with Sales and Marketing teams.



Salesforce integration with Microsoft Teams lets you search and mention Salesforce records in Teams chats and conversations. A team member shares a contact from his Salesforce records in the channel.



Salesforce users can view record details and can collaborate about Salesforce records on dedicated channel tabs in Teams.



Make the most of the collaborative power of people in your organization with Teams Ideas. The Sales Lead crowdsources ideas for cross-selling from members of his team.



Tap Into the Knowledge Within Your Company

Sales Associate

Scenario Walkthrough

Contoso expends a huge amount of time and effort to identify and qualify sales leads, and the sales team needs to distinguish opportunities effectively. Without appropriate information, the team may not achieve its fullest potential and turn these opportunities into leads. Here's how the Sales Associate uses an array of applications on Teams to utilize the knowledge data base in the organization.

- Receives an update about potential sales opportunities in a new sector via Bing News.
- Attends a scheduled meeting with the Sales team to discuss the way forward.
- Refers to already available company data in Files tab.
- Takes up the task of preparing sales pitch for the potential clients and initiates research on HitHorizons.
- Gets to know his coworkers via Who and connects with him on 1:1 chat.

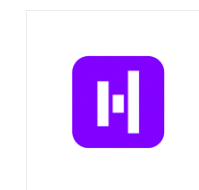
How did Microsoft Teams help the Sales Associate to execute his roles and responsibilities?

- View broadcast of important news sent to the organization using Bing News.
- Provide a communicative platform for meetings via PC as well as mobile.
- Identify potential business opportunities along with their essential information via HitHorizons.
- Know your co-workers and their interests with Who.

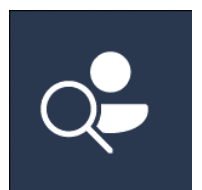
Which app integrations on Teams made it possible?



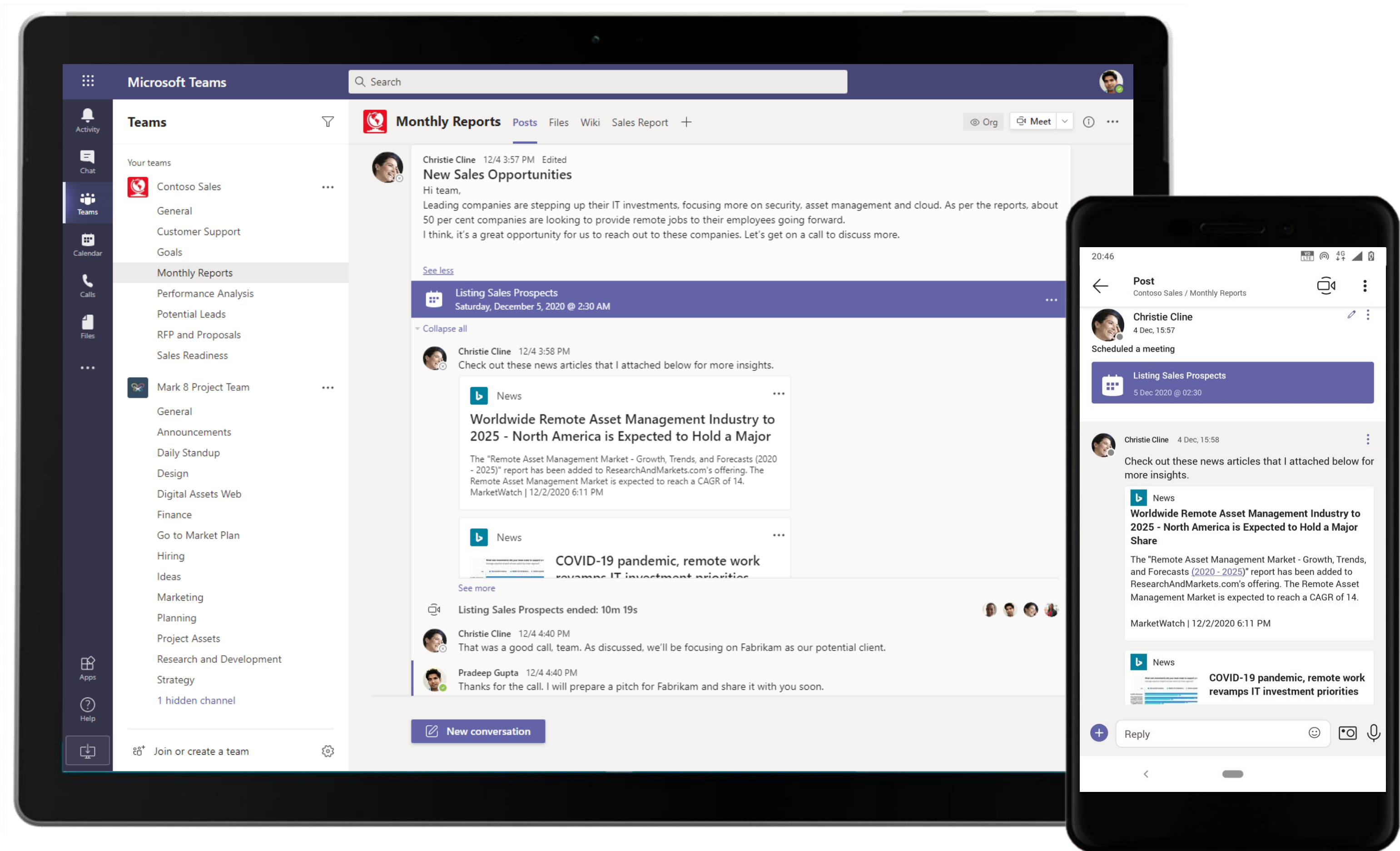
Bing News



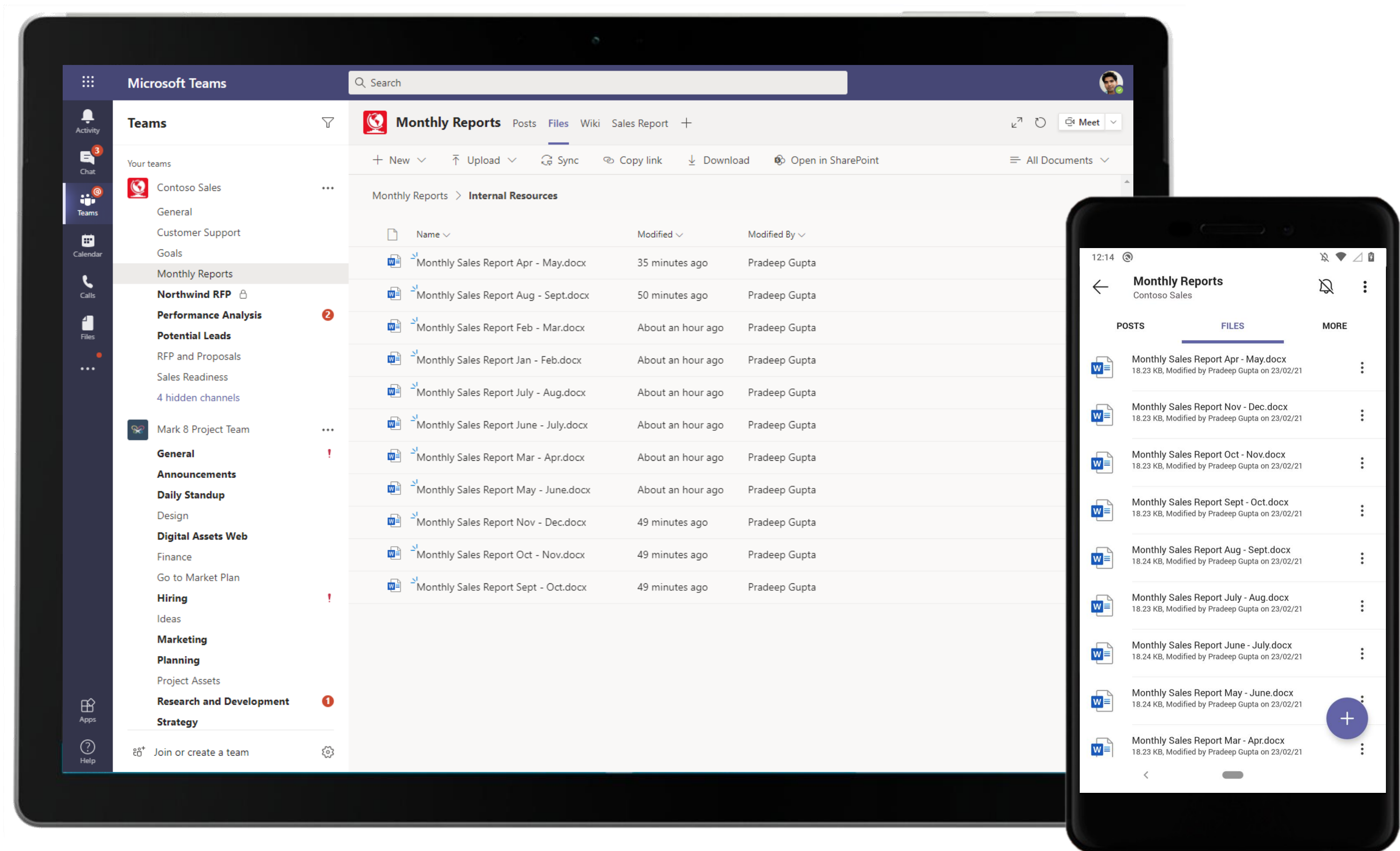
HitHorizons



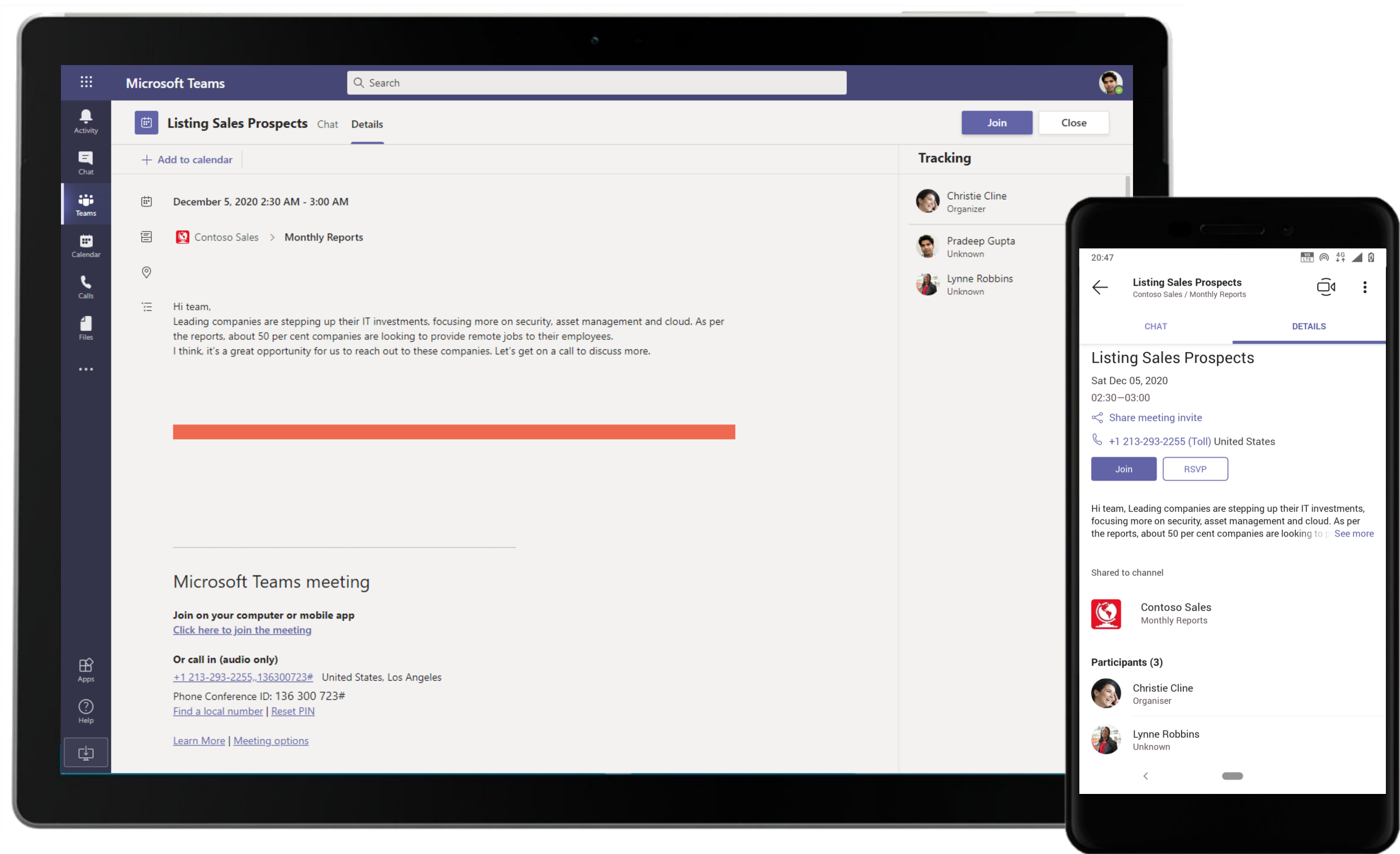
Who



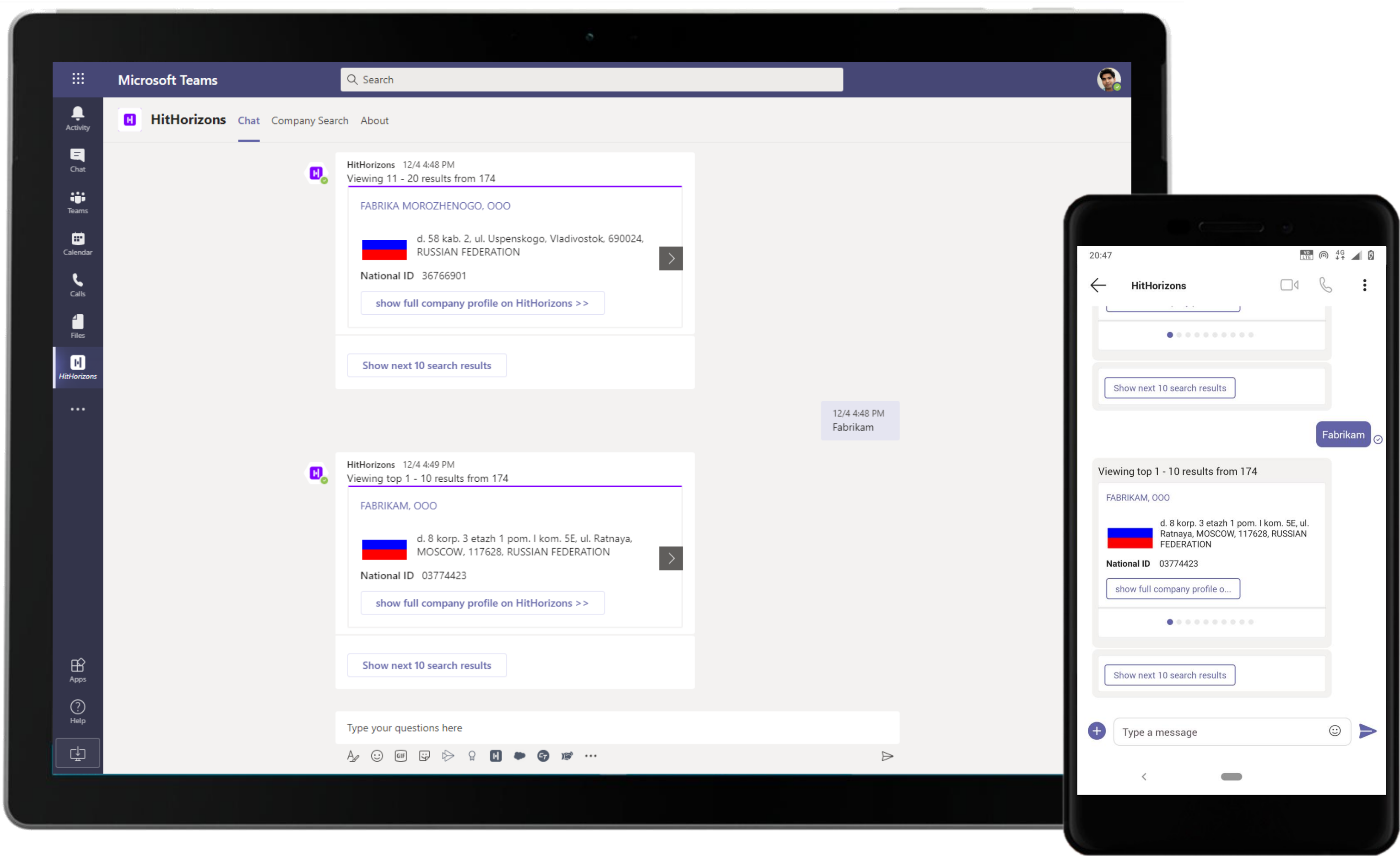
Get the most relevant news on topics you care about with Bing News right inside Teams. The Sales Associate receives an update about a possible sales opportunity via Bing News.



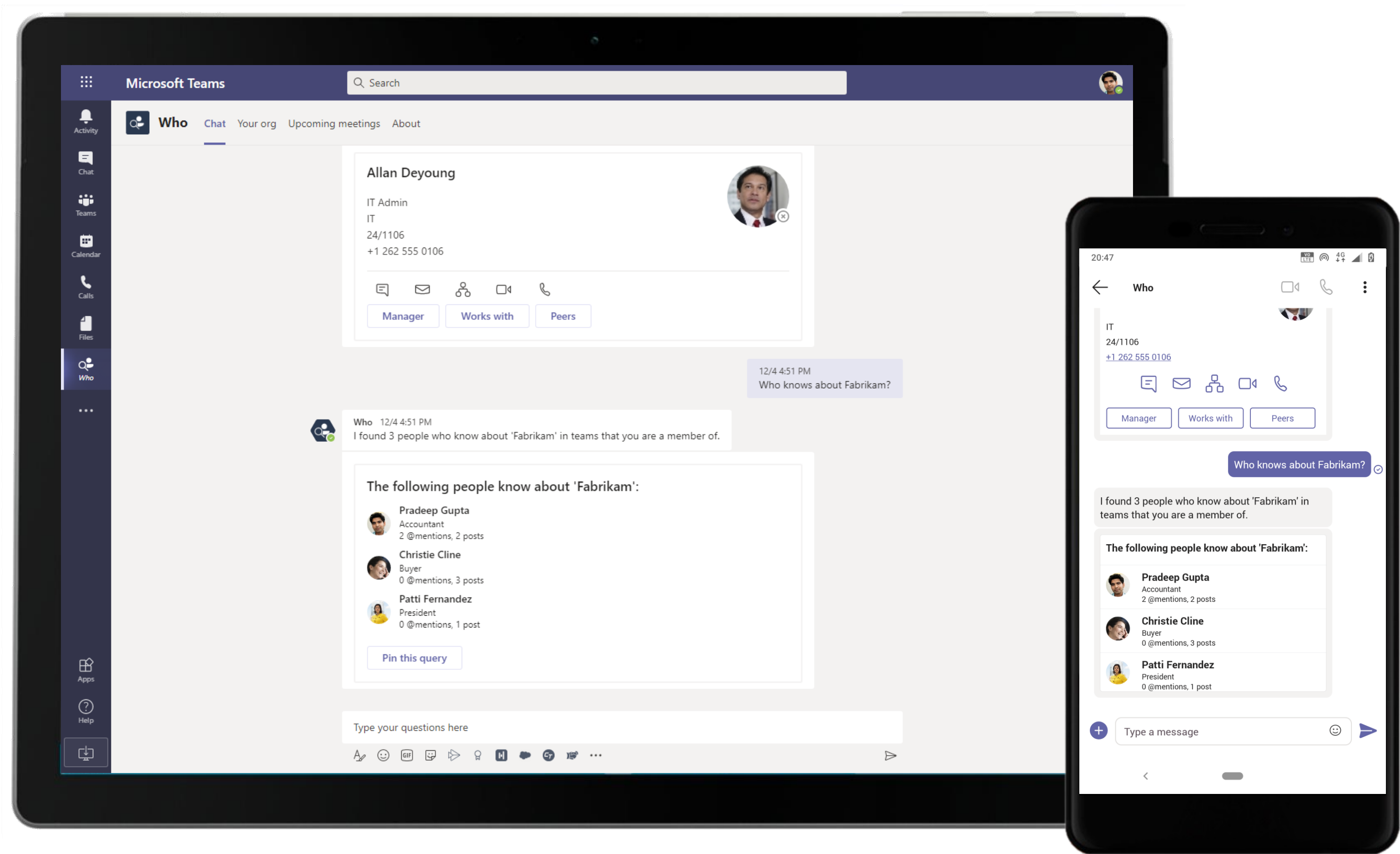
The Files tab in each channel is a cloud-enabled repository, where team members can store and access important files within a safe environment.



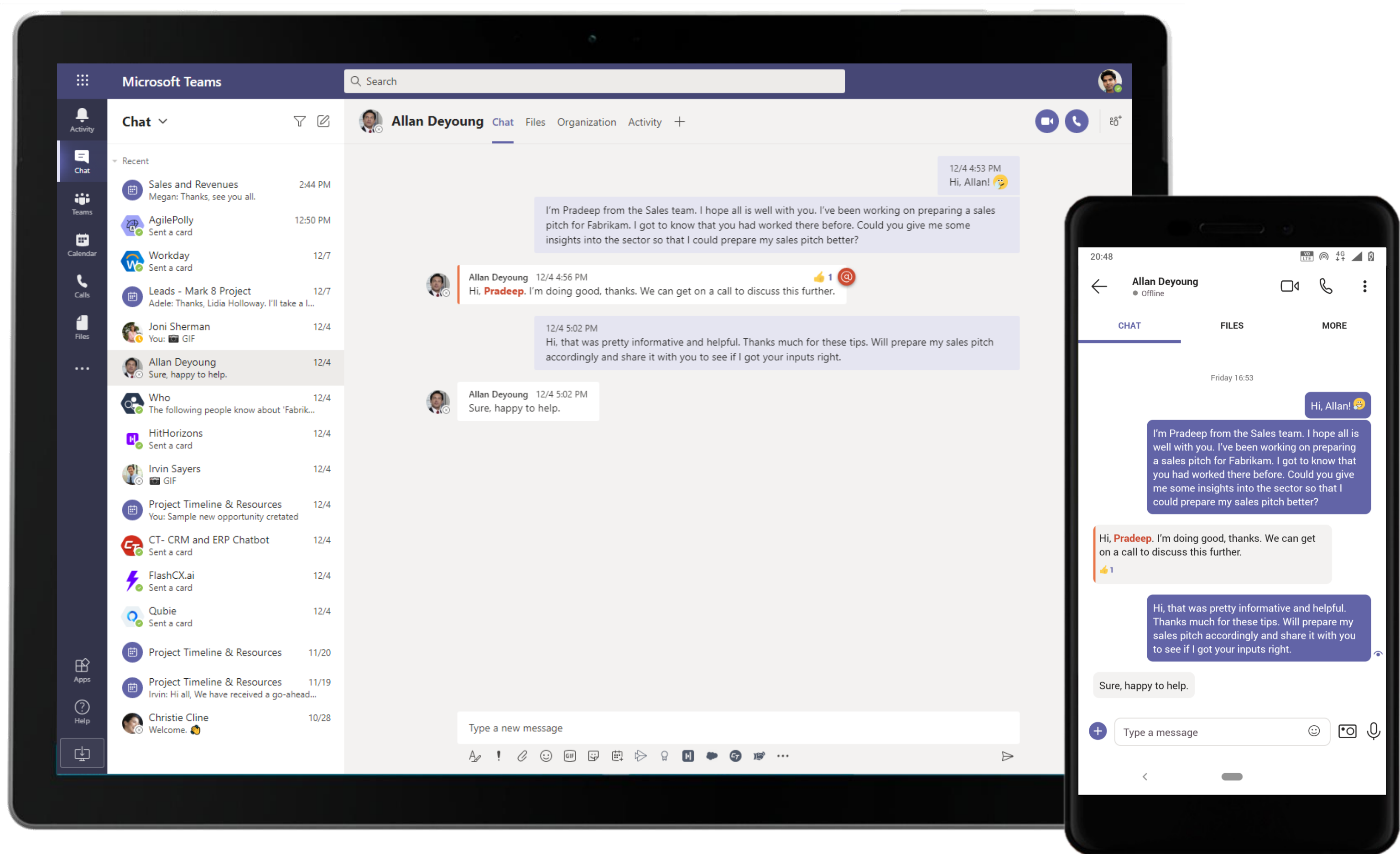
Complete meeting solutions in Teams support screen sharing, recording, video and audio conferencing. Hold calls with enterprise grade security.



Use HitHorizons Company Search or start a conversation with its SearchBot to identify companies you are looking for and get access to all the essential statistics and information related to these companies.



Search for anyone in your organization based on what they're working on, who they work with, and more with Who in Microsoft Teams. The Sales Associate uses Who to find out more about a co-worker.



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

Ready to sell?

aka.ms/goTeams 

