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.

**Strategize**
- Make Informed Decisions on the Direction of the Company
- Making a Strategic Acquisition
- Updating Product Strategy

**Lead**
- Ensuring Seamless Technology Integration
- Marketing Campaign to Rebrand the Company
- Manage External and Internal Stakeholder Communications

**Review**
- Reviewing the P&L Statement and Balance Sheet
- Weekly Meeting for Vertical Updates
- Effectively Manage Bad PR and Legal Risks
Strategize

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

Leadership 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
• Collaborate with teammates on multiple projects from within a single environment

Apps that enable an immersive experience in Teams

- Word
- Excel
- PowerPoint
- OneNote
- Asana
- monday.com
- Forms
- Power BI
- Lucidchart
- Trello
- Shifts
- MURAL
- Smartsheet
- Presentations AI
- Teamwork
- Adobe Sign
- Tasks by Planner and To Do
- Communities
Meet the Business Decision Makers

Chief Officers (CxO)

Chief Executive Officer

“The quality of a leader is reflected in the standards they set for themselves.”

- Create, communicate, and implement the organization's vision, mission, and direction
- Lead the development and implementation of the overall organization strategy
- Formulate the strategic plan that guides the direction of the organization

Chief Operations Officer

“In the end, all business operations can be reduced to three words: people, product, and profits.”

- Supervise all daily operations of the company
- Implement strategies, procedures and business plans needed to enhance company growth
- Collaborate with the CEO in driving organizational vision, operational strategy, and hiring needs

Chief Product Officer

“If you want to go big in the business world, you need to have the right product at the right time.”

- Structure the Product team to meet objectives and deliver results
- Collaborate with Sales and Marketing, and own product adoption and revenue
- Work closely with the executive team and the engineering team to turn technology into Product
Make Informed Decisions on the Direction of the Company

CEO (Chief Executive Officer)

Scenario Walkthrough

It is essential for any organization to consider multiple converging trends and how they would impact all aspects of work. The Chief Executive Officer conducts a virtual strategic off-site to redesign work and workforces to integrate robotics and artificial intelligence technologies using Microsoft Teams.

- Sends a message in multiple channels to inform the team members about the virtual off-site.
- Schedules a meeting to discuss the year in review and the following year’s projections.
- Shares a PowerPoint presentation in the meeting and offers the projections using Power BI.
- Concludes the meeting with a message and urges participants to leave their feedback on the virtual off-site with Forms.

How did Teams help the Chief Executive Officer execute her roles and responsibilities?

- Create and analyze data with rich visual representations using Power BI.
- Prepare powerful presentations with rich visual content and crystal-clear infographics using PowerPoint.
- Get real-time feedback with quizzes, polls, and pre-built surveys with Forms.
- Enable live captions during group and 1:1 calls to keep track of conversations.

Which app integrations on Teams made it possible?

PowerPoint  |  Power BI  |  Forms
Choose your audience for the message you want to post. You can choose which channels you want to post your message in Microsoft Teams.
Strategize – Make Informed Decisions on the Direction of the Company

Collaborate with your team through channel communications using @mention to tag required personnel and keep conversations around the topic in a single thread.
A meeting is set up in the channel to discuss the off-site and a meeting invite is sent to relevant team members and decision makers.
Strategize – Make Informed Decisions on the Direction of the Company

Show them what you’re feeling with reactions—now in meetings. Choose from like, love, applause, and laugh. You can convey your feelings without uttering a word by choosing an appropriate button that suits your expression.
Create and share PowerPoint presentations over a Teams call to make meetings meaningful and to offer attendees a visual representation of key points covered.
Strategize – Make Informed Decisions on the Direction of the Company

Build dynamic data visualizations, measure metrics, and track analytics through Power BI within Teams. The meeting attendees can dive into this wealth of analytical data shared using Power BI.
Strategize – Make Informed Decisions on the Direction of the Company

Use the meeting chat for follow-up conversation about meeting outcomes. You can also view files shared during the meeting and continue discussion with the invitees on the same thread.
Express complex emotions in ways beyond words. Custom Stickers app helps you to save and send your own stickers in Microsoft Teams.
Easily create surveys, quizzes and polls using Forms in Microsoft Teams. You can use the app in a tab at the top of a chat or channel.
Making a Strategic Acquisition
COO (Chief Operations Officer)

Scenario Walkthrough

The leadership at Contoso is looking to make a strategic acquisition to better position itself to accomplish its long-term vision. The acquisition will support Contoso’s new vision of integrating robotics and artificial intelligence technologies. After a proposal is brought to the Chief Operations Officer’s attention, he dives deep into the impact and discusses potential options with the Board of Directors to finalize the acquisition and set a definitive timeline. Once the deal is finalized, the Chief Operations Officer announces the major acquisition to the entire company. All this within Microsoft Teams.

• Joins a meeting with the VP (Product) to understand the hurdles faced by the team.
• Collaborates over a Lucidspark board during the meeting to discuss the benefits and impact of a potential acquisition.
• Responds to the VP (Product) over 1:1 chat and reviews a detailed presentation sent to him.
• Uses the scheduling calendar to schedule a meeting with the Board of Directors to discuss the potential acquisition.
• Creates the meeting agenda using Decisions and takes a critical vote during the call.
• Records the meeting decision to proceed with the acquisition via Decisions.

How did Teams help the Chief Operations Officer execute his roles and responsibilities?

• Hold meetings with applications help team members to stay on the same page and collaborate on Apps within the meeting interface.
• Create meeting agendas, record decisions for productive meetings with Decisions.
• Yammer communities connect the organization, enabling you to watch live events, and stay up-to-date with news and announcements.
• Collaborate, Communicate and brainstorm effectively with Lucidspark.

Which app integrations on Teams made it possible?

Lucidspark
PowerPoint
Decisions
Communities
A meeting invite is sent to stakeholders with a clear brief about meeting agenda. This helps attendees to prepare in advance for the discussions during the meeting.
Hold calls and conferences and share screens with enterprise security. With the mobile app functionality, you can attend the call from anywhere, anytime.
Add a Lucidspark board as a meeting tab. Using the embedded editor, multiple collaborators can edit or comment on your board without ever leaving Microsoft Teams.
Strategize – Making a Strategic Acquisition

Conversations, action items and relevant documents shared in the meeting chat thread are accessible right inside Teams.
Quickly reach out to and chat with co-workers. Take conversations offline from channels for 1:1 discussions. The Chief Operations Officer responds to the VP (Product) and reviews the presentation shared with him.
Create visually rich and engaging presentations with PowerPoint right inside Teams. The VP(Product) shares the presentation over 1:1 chat.
With Microsoft Teams, you can schedule meetings without difficulty and find the best available times for invitees through the native scheduling calendar.
Complete meeting solutions in Teams support screen sharing, recording, video and audio conferencing. Scheduling Assistant feature suggests times that are optimal for all attendees.
Build apps or integrate existing ones within the meeting surface and benefit from richer collaboration experiences across the entire meeting lifecycle – covering events and actions from before, during, and after a meeting.
Create a great meeting foundation with an agenda builder directly inside Teams with Decisions—add descriptions and attachments, assign presenters and set objectives.
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 the Decisions app in meetings, you can view the meeting agenda, add decisions or take a quick vote on decisions all without leaving the meeting interface.
Participants can record meeting decisions against agenda items right within the Decisions meeting tab. The Chief Operations Officer records the Board’s decision to go ahead with the acquisition of Northwind.
Communities in Teams enable people to share knowledge, ask questions, get answers, and build relationships across teams and organizational silos. The Chief Operations Officer announces the acquisition of Northwind to all employees within Contoso.
Scenario Walkthrough

New regulations announced by the government could adversely affect Contoso operations and negatively impact the sales of their most popular products. The product team brainstorms ideas to make changes to the impacted product lines to comply with the new regulations without losing its essence. The Chief Product Officer leverages Microsoft Teams to quickly share high-level inputs, review and approve the product strategy.

- Schedules a meeting to discuss the updated regulations for the line of products and decide the further action plan.
- Shares a presentation containing the new set of regulations due to which product strategy must be modified.
- Adds a tab to display the change w.r.t product usage using Freehand by InVision.
- Uses Zoho Projects to check on the ongoing tasks and check the impact on the timeline post the change in strategy.
- Receives a document with the whole plan added to it, reviews it, and approves it in collaboration with the Senior Product Manager.

How did Teams help the Chief Product Officer execute her roles and responsibilities?

- Create and design your presentations effortlessly with PowerPoint.
- Collaborate, ideate, and draft solutions with team members in real-time using Freehand by InVision.
- Create and manage all your projects effectively with Zoho Projects.
- Utilize Word to compile project brief and other important information.

Which app integrations on Teams made it possible?

- PowerPoint
- Freehand By InVision
- Word
- Zoho Projects
A meeting to discuss new federal policy changes 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.
Strategize – Updating Product Strategy

Microsoft Teams makes it easy to share files within channels. Your colleagues can view, edit and collaborate on the PowerPoint files right within Teams, thanks to deeply integrated Office 365 services.
Draw, plan, and collaborate on an infinite whiteboard—in real time with Freehand by InVision in Microsoft Teams. The team collaborates on call using Freehand by Invision.
Strategize – Updating Product Strategy

Conversations, action items and relevant documents shared in the meeting chat are accessible right inside Microsoft Teams.
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.
Strategize – Updating Product Strategy

Plan your projects, assign work, manage resources and collaborate better with your team with Zoho Projects in Microsoft Teams. The Chief Product Officer uses Zoho Projects to check impact of federal regulations on the ongoing projects.
Get visual representations of your projects’ progress through Gantt charts and customized reports with Zoho Projects in Microsoft Teams.
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.
Lead

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

Leadership 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 to everyone to stay on the same page
- 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
Chief Officers (CxO)

Chief Technology Officer
"I believe that technology is one of the secrets to helping improve the customer experience."
- Present reports on the company's technology status, goals and progress
- Create and implement technology strategies
- Align the company's technology resources with the organization's short and long-term goals

Chief Marketing Officer
"Marketing's job is never done. It's about perpetual motion. We must continue to innovate every day."
- Set and achieve strategic goals related to advertising and marketing campaign initiatives
- Design marketing campaigns for each aspect of our company
- Negotiate compensation for outside contractors related to marketing and promotions

Chief Executive Officer
“The quality of a leader is reflected in the standards they set for themselves.”
- Create, communicate, and implement the organization's vision, mission, and direction
- Lead the development and implementation of the overall organization strategy
- Formulate the strategic plan that guides the direction of the organization
Ensuring Seamless Technology Integration
CTO (Chief Technology Officer)

Scenario Walkthrough

Contoso has acquired Northwind in an exclusive acquisition deal, and it is now the IT team’s job to ensure a smooth amalgamation of both companies’ technologies and data. The Chief Technology Officer works with the tech teams of Contoso and Northwind to discuss steps to seamlessly integrate the systems of both organizations with minimal customer impact and complete safety from any cyber-attacks.

• Connects with the IT Lead at Northwind for documentation and references.
• Sets up a meeting to finalize the activities and the team to start the integration process.
• Views the meeting notes and key points discussed in the meeting.
• Pins a tab containing tasks for all the team members.
• Views the budget estimate shared by the Finance Manager to carry out the integration.

How did Teams help the Chief Technology Officer execute his roles and responsibilities?

• Hold meetings with applications help team members to stay on the same page.
• Allow quick access to shared information, notes, and co-author documents using Office applications like OneNote, Word, and Excel, respectively.
• 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?

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Use channel conversations to relay updates to team members and begin a process flow for task completion. The Chief Technology Officer kick-starts a process flow and @mentions the participants who will take the process forward.
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.
The Chief Technology Officer creates a meeting invite highlighting the purpose of the meeting. Scheduling a meeting in the channel serves as an open invite for other interested team members to participate and offer inputs.
Teams and channels are where you hold meetings, have conversations and work on files together with team members. The Chief Technology Officer holds a meeting with his team and begins working with them on integration.
The Chief Technology Officer creates a meeting invite highlighting the purpose of the meeting. Scheduling a meeting in the channel serves as an open invite for other interested team members to participate and offer inputs.
OneNote enables collaborative and powerful document creation within Microsoft Teams. Quickly disseminate meeting outcome and notes among team members with OneNote tabs in channels.
The Tasks by Planner and To Do tab helps the Chief Technology Officer break down his tasks efficiently and assign stakeholders for each task, without having to leave the Teams app.
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.
Lead – Ensuring Seamless Technology Integration

The Finance Manager uses Excel to build and present data to the team. Create impactful summaries of crucial data with Excel, Word and OneNote for Microsoft Teams.
Marketing Campaign to Rebrand the Company
CMO (Chief Marketing Officer)

Scenario Walkthrough

Businesses often need to rebrand, owing to their market expansions or changing times. Contoso is looking to redesign its logo and color scheme to resonate with the brand values better. Here’s how the Chief Marketing Officer connects with different teams spread across the organization efficiently and conveniently to achieve the task.

• Participates in a channel meeting with the Marketing team to review the final draft of the new company logo.
• Reviews the new company logo via Adobe Creative Cloud in a channel tab.
• Schedules a meeting with the leadership team to discuss the new logo and new color scheme.
• Leverages live captions and meeting extensibility features to ensure that everyone is on the same page.
• Creates a live poll to get an overview of the attendee’s perspective in real-time via Forms.
• Looks at the press conference agenda shared by the Vice President.

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

• Find, view, and share Adobe Creative Cloud assets quickly within Microsoft Teams.
• Enable live captions during group and 1:1 calls to keep track of conversations.
• Include Forms in a meeting to launch a poll and get quick answers to survey questions.
• Collaborate on digital content and share it with the team using Evernote.

Which app integrations on Teams made it possible?

Adobe Creative Cloud, Polly, Evernote
Use a dedicated team to prepare and collaborate on a plan of action. The Chief Marketing Officer uses an exclusive team for syncing efforts on redesigning of the logo.
With the Adobe Creative Cloud app for Microsoft Teams, designers can easily share their work, get feedback and stay up-to-date on actions taken on their assets all within Microsoft Teams.
Complete meeting solutions in Teams support screen sharing, recording, video and audio conferencing. Scheduling Assistant feature suggests times that are optimal for all attendees.
Add a tab to your meeting invite for richer collaborative meeting experience. The Chief Technology Officer configures Polly to the meeting invite.
Meeting attendees can leverage a wide range of features like live captions, background effects, meeting recordings and more for an engaging and productive meeting experience. The Chief Marketing Officer turns on live captions during the meeting.
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.
Conduct quick polls, gather feedback, carry out surveys with Polly in Microsoft Teams - right inside the meeting.
Polly helps you capture instant feedback in seconds directly in Microsoft Teams and meetings. Just about anyone can get started with Polly to quickly reach their colleagues and make data-driven decisions instantly.
Meeting participants are notified five minutes before a meeting is scheduled to end. This helps everyone prioritize discussions and adhere to the meeting schedule.
Meeting participants can view real-time results of the poll and engage in conversations with full context of the meeting.
Microsoft Teams conversations are threaded so users can reply directly in-context to specific conversations, while keeping relevant discussions and files grouped together.
Unlock the power of teamwork—collect, organize and share the information, documents and ideas you encounter every day with Evernote in Microsoft Teams. A press conference agenda is shared in an Evernote tab.
Manage External and Internal Stakeholder Communications

CEO (Chief Executive Officer)

Scenario Walkthrough

The leadership team at Contoso is about to address the media and shareholders for the quarterly earnings call and announce the AI Initiative. The CEO communicates with the leadership team and reviews the presentation before getting on the quarterly call. She then addresses all Contoso employees over a company-wide town hall to answer their questions and share her vision for the future of Contoso. All this while leveraging powerful applications, tools, and features within Microsoft Teams.

- Responds to a channel message and reviews documents and links for the quarterly earnings call within the Files tab.
- Visits Contoso’s web page to view details of the press release within a website tab.
- Accesses a recording of the completed Quarterly Earnings within a channel tab via Stream.
- Reaches out to the HR Lead and requests her to organize a town hall during the upcoming company-wide event.
- Views the itinerary for the event using Lists.
- Joins the company-wide live town hall to address the employees and participate in a Q&A session.

How did Teams help the Chief Executive Officer execute her roles and responsibilities?

- Engage your organization virtually with live events in Teams.
- Create visually rich and engaging presentations with PowerPoint right inside Teams.
- Provide easy access to relevant websites within a channel.
- Communicate with employees seamlessly over 1:1 chat.

Which app integrations on Teams made it possible?

- Praise
- PowerPoint
- Website
- Microsoft Stream
- Lists
Show gratitude for peers who went above and beyond at work with Praise in Microsoft Teams. The CEO congratulates the team for the great job they have done ahead of the quarterly earnings call.
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 visually rich and engaging presentations with PowerPoint right inside Teams. The Chief Executive Officer views the PowerPoint presentation for the Quarterly Earnings call.
The Chief Executive Officer uses Excel in Teams to view the publicly accessible quarterly earnings web page pinned in a tab for quick access.
With Stream, access all your videos in one place, wherever you are. Watch videos from across your organization in the Stream application or in other applications you use every day—any time, on any device.
Use a private one-on-one chat or a group chat for conversations that don’t require the entire team. The CEO reaches out to the HR lead and requests a town hall using 1:1 chat.
Record data, have conversations about list items, organize process, and track status in an environment built for teamwork and collaboration with Lists in Microsoft Teams. The CEO views the event itinerary pinned in the channel.
Access all events in the channel from one place with Channel Calendar. All members—except guests—can add events to the calendar and view event details.
Produce the live event using Teams, a lightweight option to create the event and invite presenters and panelists to participate on their own devices.
Event producers can leverage a wide range of features to share content, manage content shared by other presenters, moderate participant’s questions and add responses wherever necessary.
Microsoft Teams allows event organizers to change the event view, add content to the broadcast queue and start the live event when the presenters and producers are ready to engage the audience.
As one of the producers of the live event, the CEO can choose to engage the audience with the prepared presentation. Participants can view only what the producer chooses to send live.
The producer of the live event can review questions asked by the participants and choose to either dismiss or publish them based on their relevance to the event.
Lead – Manage External and Internal Stakeholder Communications

The Producer of the event responds to the participants’ questions and notifies the CEO of questions to be answered live on the broadcast.
Review

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Leadership Superpowers in Teams

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Apps that enable an immersive experience in Teams

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- Adobe Sign
- Tasks by Planner and To Do
- Communities
Chief Finance Officer

"Financial fitness is not pipe dream or a state of mind, it’s a reality if you are willing to pursue it and embrace it."

- Perform risk management by analyzing the organization’s liabilities and investments
- Decide on investment strategies by considering cash and liquidity risks
- Control and evaluate the organization’s fundraising plans and capital structure

Chief Operations Officer

"In the end, all business operations can be reduced to three words: people, product, and profits."

- Supervise all daily operations of the company
- Implement strategies, procedures and business plans needed to enhance company growth
- Collaborate with the CEO in driving organizational vision, operational strategy, and hiring needs

Chief Legal Officer

"A law is valuable, not because it is a law, but because there is right in it."

- Develop corporate legal strategy to protect the company’s interests
- Oversee the delivery of legal services and resources to accomplish corporate goals
- Develop and lead internal audit and corporate compliance programs
Reviewing the P&L Statement and Balance Sheet
CFO (Chief Finance Officer)

Scenario Walkthrough

To achieve rapid growth in the competitive market and maximize company revenue, the leadership team must stay on top of its financials across teams and locations to make well-informed strategic decisions. See how the Chief Finance Officer leverages applications and features in Teams to stay on top of the company’s financials.

- Receives a consolidated Power BI sales and revenue report from the VP (Finance) and communicates with him on 1:1 chat.
- Gets an overview of the company's sales and views quick update of the 90-Days Pipeline using the CT-CRM and ERP Chatbot.
- Creates a private channel with the Chief Executive Officer, Chief Operations Officer, and Chief Revenue Officer to review the company's balance sheet.
- Posts a message and shares the balance sheet, other key financials within configured tabs via Power BI and Smartsheet.
- Gets on a call with the leadership to review the data in detail to brief the leadership of Contoso’s latest financial statement.
- Responds to the CEO to brief her of the way forward based on decisions taken during the call.

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

- Hold meetings with applications help team members to stay on the same page.
- Smartsheet helps stay on top of your balance sheet and collaborate on critical data.
- Stay on top of your organization’s latest sales numbers with CT-CRM and ERP Chatbot.
- Interact with data and track key metrics in real-time with Power BI.

Which app integrations on Teams made it possible?

CT-CRM and ERP Chatbot  Power BI  Smartsheet
Stay on top of your organization’s latest sales numbers with CT-CRM and ERP Chatbot in Microsoft Teams. The CFO views the sales numbers using CT-CRM and ERP Chatbot.
Quickly reach out to and chat with co-workers. Take conversations offline from channels for 1:1 discussions. The Chief Finance Officer reaches out to VP (Finance) to understand his views over company’s financials.
If you need a smaller audience for a specific project, you can create a private channel for your team. The Chief Finance Officer creates a private channel for the leadership team to review company’s balance sheet.
If you want a focused place to discuss sensitive information such as budgets, resourcing, strategic positioning and so on, create a private channel for your team. Only owners or members of the private channel can access it.
Hold calls and conferences and share screens with enterprise grade security. With mobile functionality for the Teams app, you can participate in calls from anywhere, anytime.
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.
Build dynamic data visualizations, measure metrics, and track analytics through Power BI within Teams. The leadership team can dive into this wealth of analytical data shared using Power BI.
Power BI allows you to expand individual visualizations and dive into the details of the data that's presented. Here the Chief Finance Officer views the monthly revenue details on Power BI.
Review – Reviewing the P&L Statement and Balance Sheet

With the Smartsheet for Microsoft Teams integration, you can add Smartsheet sheets, dashboards, and reports as ‘Tabs’ within a Team channel, helping your teams bring conversations together with a current view of projects, while providing a central location where teams can work more effectively.
Weekly Meeting for Vertical Updates

COO (Chief Operations Officer)

Scenario Walkthrough

The Chief Operations Officer must ensure operations run smooth and any blockers that could hamper them are addressed at the earliest. It is his responsibility to see that all teams work seamlessly together and ensure maximum productivity. Here is how the COO leverages Microsoft Teams to communicate across departments every week and receive vertical updates from all reportees and take decisions accordingly.

- Schedules a channel meeting and pins a Teamwork tab containing the discussion points to be taken up in the weekly meeting for all departments.
- Refers to the projected revenue for the quarter shared by the Chief Sales Officer.
- Discusses the ongoing marketing campaign with the Chief Marketing Officer and suggests changes for the further marketing activities.
- Views and approves decisions to be taken on hiring with the Chief Human Resources Officer’s participation.
- Discusses the key issues for data vulnerability with Chief Information Security Officer and provides suggestions.

How did Teams help the Chief Operations Officer execute his roles and responsibilities?

- Facilitation of data-driven decisions informed by visualizations and scoring in Power BI for Microsoft Teams.
- Create tasks, add labels, assign teammates, and manage your work in flexible Kanban boards with Workstreams.ai.
- Collaborate on team decisions by creating decision cards to remove the need for back and forth on decisions with We Decide.
- Keep your teammates on project information by adding notebooks with Teamwork.
A weekly sync meeting is set up in the channel to discuss relevant issues and a meeting invite is sent to relevant team members and decision makers.
Meeting participants can leverage a wide range of features like live captions, call recording, background effects and more for an engaging and productive meeting experience.
Live captions can make your meeting more inclusive to participants who are hard-of-hearing, people with different levels of language proficiency, and participants in loud places by giving them another way to follow along.
Screen sharing lets you present your screen during a meeting. You can choose to present your entire desktop, a specific app, or a file. The Chief Sales Officer shares the revenue analysis with meeting participants.
Stay up to date with your projects, without leaving Teams with Teamwork. Teamwork in Microsoft Teams lets you add content from Teamwork or Spaces as tab Pages in Microsoft Teams.
Create tasks, add labels, assign teammates and manage your work in flexible Kanban boards with Worstreams.ai in Microsoft Teams.
We Decide is a simple and structured way to create and collaborate on team decisions in Microsoft Teams by introducing decision cards. Decision cards help moving decisions out of conference calls and remove the need to email back and forth on team decisions.
Channels facilitate instant group communication. Team members stay in the know and can share information directly in the conversation thread to accelerate decision making.
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.
Effectively Manage Bad PR and Legal Risks  
CLO (Chief Legal Officer)

Scenario Walkthrough

The Public Relations team notices that highly confidential company information has been leaked to the press, resulting in potential legal risks. This incident is immediately brought up to the Legal team and escalated further to the Chief Legal Officer and Chief Marketing Officer. The Chief Legal Officer then uses Microsoft Teams to assess the situation, advise the employees on point, and review a statement before sending it to the press.

- Receives an urgent message regarding the leak of confidential company documents alleging inadequate safety at Contoso’s factories.
- Reviews a list of the press articles to identify legal risks impacting the launch plan via Lists.
- Views tweets shared within the channel using Power Automate and gets quick overview of the situation over a call.
- Reviews and approves the press statement protecting Contoso from potential legal issues via Approvals.
- Gets on a call with the Legal Manager to get an update on safety documentation across Contoso’s factories.
- Assigns tasks via Trello and views an internal update sent over Communities.

How did Teams help the Chief Legal Officer execute his roles and responsibilities?

- Power Automate helps keep track of social media activity with automated social media messages posted in Teams.
- Streamline approvals with the Approvals App in Teams.
- Notify team members every two minutes for up to twenty minutes with Priority messaging.
- Communicate to teams and employees within your company with Communities.

Which app integrations on Teams made it possible?

- Trello
- Communities
- Approvals
- Lists
Use a private one-on-one chat or a group chat for conversations that don't require the entire team. You can name a group chat to have focused conversation like the one over here.
Create a new list from scratch, from templates, based on an existing list, or by importing data from Excel with Lists. The Chief Legal Officer views a list of articles about the factory rumors.
Grab quick attention of your team by marking a message as important. The social media team is alerted to the rumors and is pulled into a call.
Send, receive, manage, and share approvals in Microsoft Teams with the Approvals app. The Chief Legal Officer views all approvals sent to him in a consolidated tab view.
Download documents sent for approval and add personalised feedback. The Chief Legal Officer downloads the statement on factory rumors, reviews it, and adds a comment before approving it for release.
Track your approvals and get notified of updates at each step. The approvers are notified when requests are sent for their approval and the senders are notified as soon as their requests are approved.
Speed Dial in Microsoft Teams is a handy feature that you can use to quickly connect with important people in your organization. Simply add the contact to the speed dial group and you need not search them in future.
Hold calls and conferences and share screens with enterprise security. The Chief Legal Officer gets on a call to get a quick update from the Legal Manager.
The Chief Legal Officer assigns and tracks tasks with a Trello tab in the channel. This provides complete clarity for the team members regarding the tasks they need to pick up and close out.
Yammer communities in Teams enable you to build relationships and share knowledge across teams and the entire organization. Make announcements, watch live events, stay up-to-date with news and events in the company with Yammer communities.
Ready to lead?

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