Microsoft Teams for Chief of Staff (Business Administration)
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.

**Administration**
- Driving Board Meetings
- Running the Annual Budget Process
- Expanding Team Resources

**Maximizing Efficiency**
- Determine Key Performance Indicators
- Tracking Changes to Key Metrics
- Determine and Prioritize Crucial Tasks
- Tracking High Priority Initiatives and Identifying Obstacles

**Leadership Advisor**
- Serving as a Trusted Advisor and Confidant
- Optimizing Product Portfolio
- Manage Hiring Process for a Leadership Role
- Crowdsource Ideas to Promote Collaboration
Meet the Business Decision Makers

**Chief of Staff**

“At its core, the role of a Chief of Staff is to allow the executive to scale, and to give them back their most important resource: time”

- Ensure that the staff and board have sufficient and up-to-date data and look to the future for change opportunities
- Make time, information, and decision-making more effective
- Help CEO and senior executives navigate through uncertainty and risk

**Vice President (Sales)**

“The new reality is that sales and marketing are increasingly integrated. Marketing needs to know more about sales, sales needs to know more about marketing.”

- Think strategically and implement relentlessly with a process mindset
- Interact with customer decision-makers at all organization levels and in all sizes of business
- Determine annual unit and gross profitability by analyzing trends and results

**HR Lead**

“HR leadership is the art of giving people a platform for spreading ideas that work.”

- Ensure smooth and efficient operations of the company’s Human Resources department
- Supervise and provide consultation to management on strategic staffing plans, benefits and training
- Oversee payroll and performance evaluation systems
Administration

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

Chief of Staff 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
- Evernote
- Power BI
- OneNote
- Forms
- Decisions
- Smartsheet
- Ment.io
- Adobe Sign
- Kudos
- miro
- Zoho CRM
- Miro
- MindMeister
- Calendar BOT
- qbo
- Boards
Driving Board Meetings

Chief of Staff

Scenario Walkthrough

The Chief of Staff acts as the co-owner of a board meeting besides the CEO. The Chief of Staff must chalk out comprehensive timelines and check-ins with all contributors, consolidate all material, and put together a final deck that is consistent across all departments in both format and content. See how the Chief of Staff drives board meetings sharing vital reports, presentations, and the meeting agenda with all the team members using Microsoft Teams.

• Uses Power BI to create an analysis for revenue to date and starts a conversation.
• Uses the Teams scheduling assistant to schedule a meeting and shares the meeting agenda via Decisions.
• Shares the meeting minutes of the previous sessions using Evernote.
• Creates a live poll to get an overview into the attendee's perspective in real-time via Forms.
• Leverages live captions and meeting extensibility features to ensure that everyone is on the same page.

How did Microsoft Teams help the Chief of Staff execute his roles and responsibilities?

• Create and analyze data with rich visual representations using Power BI.
• Collaborate on digital content and share it with the team using Evernote.
• Create and share meeting agendas, collaborate on various topics, track activities, and conclusions made in meetings with Decisions.
• 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
- Decisions
- Evernote
- Forms
Teams and channels are where you hold meetings, have conversations and work on files together with team members. The Chief of Staff creates a dashboard for the team and then uploads a deck for peer review in the channel.
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.
Create clear and concise presentations with PowerPoint in Teams. The Chief of Staff shares a PowerPoint deck in the channel for the leadership team’s review.
Scheduling Assistant feature suggests times that are optimal for all attendees. The Chief of Staff uses the scheduling assistant to find a suitable time for the board meeting.
When the Chief of Staff creates a meeting invite, he adds a description for the meeting and configures applications as meeting tabs for easy access.
With Decisions in Microsoft Teams, you can create and share agendas, collaborate on agenda topics, generate meeting minutes and view past meeting minutes, and track tasks and decisions discussed in meetings. The Chief of Staff shares the board meeting agenda using Decisions.
Capture, organize, and share notes with Evernote in Teams. Unlock the power of teamwork—collect, organize and share information, documents and meeting notes using Evernote like the Chief of Staff does it here.
Live captions enable you to keep track of conversations with accurate attribution to ensure that you know who is speaking and when. Here the Chief of Staff enables live captions during the meeting.
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.
Forms allows organizers to launch a poll without leaving the meeting window to get quick answers to survey questions in the meeting.
Meeting attendees can respond to the Forms poll within a pop-up window or from the meeting chat. Attendees can also view the poll results in real-time.
Host engaging conversations, share information, discuss ideas and get updates from your meeting apps right within a meeting chat for better meetings. The Chief of Staff views the result of the poll and sends a message to all attendees within the meeting chat.
Running the Annual Budget Process

Chief of Staff

Scenario Walkthrough

A well-prepared annual budget is extremely important for the success of a company. The Chief of Staff coordinates with the team leads and facilitates communication with them to prepare their budget material for the CEO's annual budget presentation. He uses applications and features within Microsoft Teams to effectively coordinate and ensure timely execution.

- Schedules channel meeting with team leads to discuss the progress on the budget creation.
- Notes down questions that the various team leads want clarified by the CEO using OneNote.
- Reaches out to the CEO to clarify questions asked by the Research Lead via 1:1 chat.
- Conveys the CEO's decision to the Research Lead via personal chat.
- Responds to a channel post and views the budget overview shared using Smartsheet.

How did Microsoft Teams help the Chief of Staff execute his roles and responsibilities?

- Collaborate over annual budgets and projections easily using Smartsheet.
- Channel communications and personal chat enable seamless coordination across multiple departments.
- Native features like conference calling with screenshare help ensure the team stays on the same page.
- Tagging relevant personnel with the @mention feature ensures prompt action.

Which app integrations on Teams made it possible?

- OneNote
- Smartsheet
The Chief of Staff sets the budget preparations in motion in the channel, roping in relevant team members to help. He uses the @mention feature to call their attention to his post, which also sends out a notification in their Activity Feed.
Chief of Staff – Running the Annual Budget Process

With Microsoft Teams, the Chief of Staff can schedule meetings without difficulty and find the best available times for invitees through the native scheduling assistant.
Enjoy collaborative and powerful document creation with OneNote in Microsoft Teams. Quickly disseminate meeting outcome and notes among team members with OneNote tabs in channels.
Use a private one-on-one chat or a group chat for conversations that don’t require the entire team. The Chief of Staff quickly reaches out to the CEO using 1:1 chat.
The Chief of Staff then uses the same feature to reach out to the Research Lead and updates her with the CEO's suggestion.
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!
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.
Expanding Team Resources
Chief of Staff

Scenario Walkthrough

The Chief of Staff has the skill and experience to quickly integrate themselves into an organization and assess issues that serve as barriers to a team or organization operating at maximum effectiveness. Here is how he leverages Microsoft Teams to ease his tasks and communicate with personas across the organization.

- Participates in a channel meeting to discuss way forward.
- Discusses the project timelines during the call via Kudos Boards.
- Communicates with Team Lead to note down a list of resources required for the project.
- Reviews a OneNote list of available resources along with the ones that need to be hired and gives the go-ahead to HR Lead.

How did Microsoft Teams help the Chief of Staff execute his roles and responsibilities?

- Plan, track, and discuss work items across teams with Kudos Boards.
- Collaborate with the team through channel communications using @mention to tag required personnel.
- Collaborate on digital content and share it with the team using the OneNote notebook.

Which app integrations on Teams made it possible?

- Kudos Board
- OneNote
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.
During a meeting, the participants can use rich meeting capabilities to make the meeting engaging and productive. Needless to say, meetings are fully supported on mobile clients too!
Drag-and-drop in real time, color code the assignments, and prioritize tasks with Kudos Boards in Teams. Kudos Boards gives any project a visual and intuitive interface that enables more efficient and effective teamwork.
Microsoft Teams conversations are threaded so users can reply directly in-context to specific conversations, keeping relevant chats grouped together. @mention relevant team members to make sure you grab their attention in real-time.
Quickly disseminate meeting outcome and notes among team members with OneNote tabs in channels. The OneNote link is shared in the meeting thread after the meeting.
Maximizing Efficiency

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

Chief of Staff 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
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Apps that enable an immersive experience in Teams

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- PowerPoint
- Communities
- Evernote
- Power BI
- OneNote
- Forms
- Decisions
- Smartsheet
- Ment.io
- Adobe Sign
- Kudos
- qbo
- Zoho CRM
- Miro
- MindMeister
- Calendar BOT
Determine Key Performance Indicators

Chief of Staff

Scenario Walkthrough

The Chief of Staff leads an annual strategic planning process for a new sales opportunity. He helps determine key performance indicators that would allow the leadership members to measure success better. Here is how Microsoft Teams helps the Chief of Staff collaborate with other leadership members seamlessly.

• Receives a notification when he is @mentioned in a channel conversation.
• Participates in a channel meeting to discuss strategic planning for a new project.
• Reviews important documents shared by other leadership members via Power BI and PowerPoint.
• Adds data fields that will help measure performance better via qbo.
• Shares templates for the data fields and suggests the leadership members use them subsequently.

How did Microsoft Teams help the Chief of Staff execute his roles and responsibilities?

• Prepare powerful presentations with rich visual content and crystal-clear infographics using PowerPoint.
• Share vital CRM records and stay updated on key sales metrics with Zoho CRM.
• Turn complex data into powerful, visual graphics to make informed and data-driven decisions using Power BI within a channel.
• Makes analytics conversational and discover detailed insights via qbo.
• Enable document collaboration and information sharing using OneNote.

Which app integrations on Teams made it possible?

- PowerPoint
- OneNote
- Zoho CRM
- qbo
- Power BI
Channel conversations keep team members in sync with each other. They enable contextual, structured, data-driven discussions and decision making. The Sales Lead kicks off discussion over a sales opportunity and schedules a meeting in the channel.
Bring in leads, nurture them through your pipeline and convert them into happy paying customers with Zoho CRM in Teams. The Sales Lead shares a contact in the channel using Zoho CRM.
Plan meetings or keep them impromptu, according to team members’ availability, which reflects in the native scheduling calendar. Hold calls and conferences and share screens with enterprise grade security.
A Power BI dashboard offers a visually rich view of current and projected data. The Chief of Staff uses Power BI to review the sales analysis prepared by a Sales team member.
Prepare powerful presentations with rich visual content and crystal-clear infographics using PowerPoint. The Chief of Staff also looks at the PowerPoint presentation detailing project scope.
Chief of Staff – Determine Key Performance Indicators

Type in a question and qbo in Teams surfaces the most relevant answers, visualizations and insights for you in a snap. The Chief of Staff offers his discovery of key performance indicators, facilitated by qbo.
Chief of Staff – Determine Key Performance Indicators

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

Leadership Notebook

Thursday, December 24, 2020 3:21 PM

Stakeholder Satisfaction:

Satisfaction has been explained as a function to make comparison between a perception of an outcome by an individual and the expectation of the outcome. Client’s satisfaction has become challenging issue for the past few decades in construction industry. Usually, clients of construction sector experienced dissatisfaction in many aspects including overspend in project cost, delay of completion, poor quality, and incompetent project teams like subcontractors and consultants. There is a research suggesting that to build up relationship with a new client in construction industry is five times more expensive than to maintain existing one. The findings also show that construction companies can increase their profits by 100 percent if they are able to retain five percent or more from the existing clients. Therefore, clients’ satisfaction is one of the key performance indicators for all the participants in construction industry. They must always show improvement in the performance if they want to survive and sustain in the global marketplace. However, quality performance of the products and services which have been received by client within cost and time is always tightly related to the measurement of clients’ satisfaction.

How to evaluate Stakeholder Satisfaction?

- Evaluate the stakeholder power
- Evaluating the stakeholder legitimacy
- Understand the stakeholder urgency
- Determine the stakeholder proximity
- Determine the stakeholder score index

Leadership Notebook

Thursday, December 24, 2020 3:21 PM

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Tracking Changes to Key Metrics

Chief of Staff

Scenario Walkthrough

The Chief of Staff regularly tracks key growth metrics across multiple projects within the company. He also identifies red flags and positive indicators that need to be brought up with the CEO on high priority. He notices that the current year’s latest revenue projections have been lower than what is required to meet the annual target. He then quickly reaches out to the Sales Lead to discuss the issue and schedules a meeting with the CEO on high priority to set into place a strategy for effectively improving the revenue to meet annual targets.

- Views dashboards of multiple teams and notices a decrease in the latest revenue projections via Power BI.
- Reaches out to the Sales Lead to discuss the projections and understands that this is due to new government regulations.
- Identifies a free slot and schedules a meeting between the CEO and the Sales lead using the Calendar BOT.
- Discusses strategies and the hierarchical structure of the sales teams via MindMeister.
- Discusses the objectives and key results to finalize an effective strategy via Miro.

How did Microsoft Teams help the Chief of Staff execute his roles and responsibilities?

- Track insights in real-time across multiple teams to stay on top of critical metrics using Power BI.
- Seamlessly identify free slots and schedule meetings with Calendar BOT.
- Brainstorm with digital sticky notes to plan and manage workflows with Miro.

Which app integrations on Teams made it possible?

[Power BI, Miro, Calendar BOT, MindMeister]
Easily see and chat about Power BI reports in Teams. The Chief of Staff has at his command all the relevant data through Power BI and can connect with members and teams depending on the need.
Build dynamic data visualizations, measure metrics, and track analytics through Power BI within Teams. The Chief of Staff can dive into this wealth of analytical data shared using Power BI.
Quickly reach out to and chat with co-workers. Take conversations offline from channels for 1:1 discussions, just like the conversation here between the Chief of Staff and the Sales Lead.
Leverage calendar comparison and get a quick view of the free times of others within your organization to schedule a meeting with Calendar BOT in Microsoft Teams.
Discuss Power BI dashboards, reports, and visuals directly with your colleagues. Use the Chat in Teams feature to quickly start conversations when you view reports and dashboards using Power BI.
MindMeister helps you create mind maps to brainstorm and plan with your collaborators in real-time. The Chief of Staff collaborates with the CEO and Sales Lead to discuss the organizational structure of the sales team and potential changes for higher productivity.
Work effectively together from brainstorming with digital sticky notes to planning and managing agile workflows with Miro in Microsoft Teams.
Determine and Prioritize Crucial Tasks

Chief of Staff

Scenario Walkthrough

The Chief of Staff views ‘High Priority’ tasks across projects that need urgent attention. He must take quick action and ensure that these teams function seamlessly. He leverages powerful communication tools to take quick actions and to make sure that the workstreams blocked on his approval or inputs flow smoothly without affecting deadlines.

- Keeps track of tasks and views personal To Do list via Tasks by Planner and To Do.
- Gets notified of a 1:1 chat message received from the Marketing Lead.
- Participates in a channel meeting to discuss an annual strategy plan prepared by the Marketing team for a client.
- Provides inputs and suggestions over a few required changes in the plan.
- Looks at the list of required changes in the PowerPoint presentation via Lists.
- Gets notified when he is @mentioned in a channel conversation.
- Reviews the updated annual strategy plan and conveys the same to the marketing team.

How did Microsoft Teams help the Chief of Staff execute his roles and responsibilities?

- Stay abreast of tasks across teams and filter by priority with Tasks by Planner and To Do.
- @mention to get the attention of relevant team members for quick action.
- Review important documents in a channel meeting using screen-share feature.
- Create a new list from scratch, from templates, based on an existing list, or by importing data from Excel using Lists.

Which app integrations on Teams made it possible?

- Tasks by Planner and To Do
- PowerPoint
- Lists
Tasks by Planner and To Do in Microsoft Teams makes it easy to stay organized across all your tasks. Create, assign, and track tasks individually or collaboratively with your team, and see everything come together in one place.
The Chief of Staff views the high priority tasks assigned to him using the Tasks by Planner and To Do in Teams.
Chief of Staff – Determine and Prioritize Crucial Tasks

Quickly reach out to and chat with co-workers. Take conversations offline from channels for 1:1 discussions. The Marketing Lead reaches out to the Chief of Staff and seeks his opinion over the annual strategy.
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!
Chief of Staff – Determine and Prioritize Crucial Tasks

Complete meeting solutions in Teams support screen sharing, recording, video and audio conferencing. Scheduling Assistant feature suggests times that are optimal for all attendees.
Create and share PowerPoint presentations over a Teams call to make meetings meaningful and to offer attendees a visual representation of key points covered.
Chief of Staff – Determine and Prioritize Crucial Tasks

Record data, have conversations about list items, organize process, and track status in an environment built for teamwork and collaboration with Microsoft Lists in Teams. The Chief of Staff looks at changes in the PowerPoint presentation using Lists.
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.
Scenario Walkthrough

An effective Chief of Staff tracks high priority initiatives to ensure that all the teams are in sync and that roadblocks are addressed right away. The Chief of Staff to the President of Contoso Tech reaches out to Product Leads to stay abreast of the challenges they face and offer immediate solutions wherever possible. He recognizes that the team working on Conversational AI could benefit from the R&D team’s research and connects these teams to ensure that the targets are met. He uses Microsoft Teams to provide the President overseeing the AI Division with a high-level view of the company’s achievements, obstacles, and projections of initiatives.

- Views multiple dashboards of initiatives within the company to get a quick overview of progress via Azure DevOps.
- Schedules multiple Teams calls with Project Leads of high priority AI initiatives to understand their progress and project obstacles better.
- Discuss a potential collaboration between the Project Lead and the Research team and connects them over a chat group.
- Shares the department overview with the President using PowerPoint.
- Gives the President a quick brief of the status of high priority initiatives before their meeting via 1:1 chat.

How did Microsoft Teams help the Chief of Staff execute his roles and responsibilities?

- Track tasks and the progress of multiple projects within an organization with ease using Azure DevOps.
- Chat groups can help you introduce and connect people within your organization to collaborate on important tasks seamlessly.
- Create visually rich presentations that can be easily shared using PowerPoint.

Which app integrations on Teams made it possible?

PowerPoint

Azure DevOps
Get a quick, high-level overview of the progress of multiple projects within your organization with Azure DevOps. The Chief of Staff tracks the progress on high priority initiatives using Azure DevOps dashboard.
Easily schedule meetings and find the best available times for invitees through the native scheduling calendar. The Chief of Staff uses this feature to set up a meeting.
The Chief of Staff sets up a meeting to discuss the progress of the project and shares context of the meeting with the invite. Hold calls and schedule meetings using the native meeting feature of Microsoft Teams.
Get a quick view of all your meetings throughout the day and join, edit or reschedule your meetings directly from the calendar. The Chief of Staff views all the meetings scheduled for the day.
Use a private one-on-one chat or a group chat for conversations that don't require the entire team. The Chief of Staff adds another member to his chat with his colleague.
Share relevant files over chat to provide context to the discussion in a way in Microsoft Teams. The Chief of Staff reaches out to the President in 1:1 chat and updates him.
Create visually rich presentations that can be easily shared using PowerPoint. The Chief of Staff offers department overview to the President in the PowerPoint format.
Leadership Advisor

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

Chief of Staff 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
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Apps that enable an immersive experience in Teams

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- OneNote
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- Smartsheet
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- qbo
- Zoho CRM
- Miro
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- Calendar BOT
Serving as a Trusted Advisor and Confidant
Chief of Staff with Vice President (Sales)

Scenario Walkthrough

After a halt in automobile production due to insufficient demand in the lockdown period globally, manufacturers are now gradually starting production. The Vice President of Sales turns to his Chief of Staff, who has vast experience in this sector, for a fresh perspective into the potential impact of resuming production in full capacity. The Chief of Staff offers his advice and discusses with project owners to understand their perspective to deliver well-rounded solutions to tackle the hurdle within Teams.

• Shares news article using News to start a discussion around it.
• Asks the Chief of Staff to set up a meeting for discussion with team members.
• Acknowledges the Power BI dashboard and Excel sheet with sales numbers sent by the Chief of Staff.
• Refers to the Word document containing a report on production analysis shared by the Chief of Staff.
• Appreciates the Chief of Staff for his extraordinary efforts using Praise.

How did Microsoft Teams help the Vice President of Sales execute his roles and responsibilities?

• Access and share news related to current events and share it in a channel.
• Turn complex data into powerful, visual graphics to make informed and data-driven decisions using Power BI within a channel.
• Collaborate on documentation through established channels using Office applications like Word and Excel.
• Share public appreciation to high performing team members inside Teams.

Which app integrations on Teams made it possible?

- News
- Excel
- Power BI
- Word
- Praise
Chief of Staff – Serving as a Trusted Advisor and Confidant

Get the most relevant news on topics you care about with News in Microsoft Teams. The Vice President shares a news article using News and starts a discussion around it.
Chief of Staff – Serving as a Trusted Advisor and Confidant

Microsoft Teams conversations are threaded so users can reply directly in-context to specific conversations, while keeping relevant discussions and files grouped together.
Plan meetings or keep them impromptu, according to team members’ availability, which reflects in the native scheduling calendar. Hold calls and conferences and share screens with enterprise grade security.
Build dynamic data visualizations, measure metrics, and track analytics through Power BI within Teams. The Vice President can dive into this wealth of analytical data shared using Power BI.
Chief of Staff – Serving as a Trusted Advisor and Confidant

Use Excel’s analytical abilities within Teams to build reports and share them with your team. The full canvas of Excel is available as a rich, integrated experience inside Teams enabling sales org to review, edit and publish reports.
Chief of Staff – Serving as a Trusted Advisor and Confidant

Praise lets you choose between multiple badges allowing you to customize your appreciation based on the occasion. Here the Vice President chooses between multiple badges to express appreciation for the Chief of Staff.
Add the name of the person or people you want to praise along with a customized note to show your appreciation with Praise.
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 Vice President commends the Chief of Staff with Praise.
Chief of Staff – Serving as a Trusted Advisor and Confidant

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

**Chief of Staff**

**Scenario Walkthrough**

The Chief of Staff has a wide lens on the organization. He can explore and decide on adding potential products across domains to add to the organization's portfolio. The Chief of Staff’s success depends on crafting the right portfolio for an organization through an evaluation of various factors. See how the Chief of Staff collaborates with the senior team members over Microsoft Teams to lay down an optimization process for its portfolio.

- Sets up a meeting and invites team members to discuss the company’s Product portfolio and its optimization.
- Creates a dashboard for projected growth for the current line of products using Power BI.
- Acknowledges a six-point process for understanding the optimization within a Freehand by InVision whiteboard from the CEO.
- Concludes the conversation by informing the team members about a meeting conducted every 60 days for review.

How did Microsoft Teams help the Chief of Staff execute his roles and responsibilities?

- Use Office 365 applications like Word, PowerPoint, and OneNote to allow quick access to shared documents, notes, and other information.
- Facilitate data-driven decisions informed by visualizations and scoring in Power BI for Microsoft Teams.
- Simplify collaboration on new ideas in real-time with Freehand by InVision.

Which app integrations on Teams made it possible?

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<thead>
<tr>
<th>Integration</th>
<th>Microsoft Teams Integration</th>
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<tbody>
<tr>
<td>PowerPoint</td>
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<td>Freehand By InVision</td>
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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.

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Hi all,

I have recently had a review of our company portfolio with the management. I believe we need some iterations to optimize our portfolio with respect to our line of products. Nestor Wilke, please arrange a meeting with the stakeholders to discuss this in detail and plan the implementation.

Nestor Wilke

Sure, Patti. The presentation is attached here. I have already started the documentation. I will share it in a couple of hours.

Patti Fernandez

Meeting ended: 7m 38s

You’re right, Nestor Wilke. Please create a dashboard to display our projected growth for our current line of products.

Nestor Wilke

Yes, Patti. I will get that done and share it with the document. The meeting notes can be accessed here.

Patti Fernandez

Nestor Wilke

2:05 PM

Added a new tab at the top of this channel. Here’s a link.

Portfolio Growth

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Chief of Staff – Optimizing Product Portfolio
Meet with team members anywhere, anytime. When scheduling meetings, the CEO uses the native scheduling calendar in Teams to find the best available time slots for meeting invitees.
Create and share PowerPoint presentations over a Teams call to make meetings meaningful and to offer attendees a visual representation of key points covered.
Chief of Staff – Optimizing Product Portfolio

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

- Target towards eliminating large amounts of unnecessary complexity
- Work towards improving operations for the sales team and the customers
- Target cross-selling and up-selling
- Aim towards the betterment of service levels
- Increase social media presence, try product photoshoots, and more for promotion
- Improve the buying experience for the customer (promote virtual sales)
- Look at significant EBITDA increases
- Optimization must be an ongoing process
Microsoft Teams makes it easy to share files within channels. If the files are Word, Excel, or PowerPoint files, your colleagues can even view, edit and collaborate on the files right within Teams, thanks to deeply integrated Office 365 services.
Facilitate data-driven decisions informed by visualizations and scoring in Power BI for Microsoft Teams. The Chief of Staff presents the data to the CEO using a Power BI dashboard.
Enjoy powerful document creation and editing with Word. Store team documents easily within the Files tab of the channel.
Draw, plan, and collaborate on an infinite whiteboard—in real time with Freehand by InVision in Teams. The Chief of Staff shares the process for understanding the optimization using Freehand by InVision.
Manage Hiring Process for a Leadership Role
Chief of Staff with Human Resources (HR) Lead

Scenario Walkthrough

As the HR team scrambles to find suitable candidates for the leadership roles, the Chief of Staff plays a vital role in the process to ensure the team has the right template to choose from. His inputs are crucial to the job description since the HR team can refine their search and procure better options to choose from. See how the HR Lead collaborates with the Chief of Staff to understand his perspective and shape up a perfect JD.

• Notifies the team of a requirement for a new Chief Marketing Officer via channel communications.
• Reviews template shared by the HR Executive using Template Chooser.
• Shares an Evernote tab with the template and requests the Chief of Staff to modify it based on the requirements.
• Creates a Yammer message in the channel notifying the internal staff of the new joinee.

How did Microsoft Teams help the Human Resources Lead execute her roles and responsibilities?

• Discover, find, use, and manage your templates in Teams with Template Chooser.
• Keep track of responses with alerts in the activity feed, thanks to @mentions and reply notifications.
• Collaborate and enable multiple people to work on the same document with Evernote.
• Connect with the internal employees in a fun and interactive way with Communities.

Which app integrations on Teams made it possible?

Template Chooser
Evernote
Communities
Chief of Staff – Manage Hiring Process for a Leadership Role

Teams and channels are where you hold meetings, have conversations and work on files together with team members. The HR Lead kicks off a conversation to fill a position and schedules a meeting to discuss.
With Microsoft Teams, the HR Lead can schedule meetings without difficulty and find the best available times for invitees through the native scheduling calendar. Meeting threads make follow-up conversations a breeze!
With Template Chooser in Teams, creating a new document is as simple as clicking on one of the listed templates. Templates can be organized in multiple libraries to best reflect your organizational needs.
Microsoft Teams conversations are threaded so users can reply directly in-context to specific conversations, keeping relevant chats grouped together. @mention relevant team members to make sure you grab their attention in real-time.
Capture, organize, and share notes with Evernote in Teams. Unlock the power of teamwork, collect, organize and share the information, documents and meeting notes using Evernote.
Communities in Teams enable people to share knowledge, ask questions, get answers, and build relationships across teams and organizational silos. The HR Lead posts the announcement for a new joinee on Communities.
Crowdsource Ideas to Promote Collaboration

Chief of Staff

Scenario Walkthrough

The Chief of Staff must feel the pulse of the organization and act as the connector to fill in the gaps on various levels. Contoso has decided to seek new ideas for Employee Welfare through internal crowdsourcing. The Chief of Staff designs a process in partnership with members of the decision committee to collaboratively improve organizational functioning.

- Sets up a meeting with the decision committee and discusses the process for seeking new ideas.
- Notes down the pointers to design the idea management process in a MURAL tab and pins it in the channel.
- @mentions Qubie to know the vibe of the organization.
- Sends across a message in the channel to invite team members to share their ideas.
- Concludes the conversation by thanking all the team members who shared their ideas.
- Initiates a discussion using Ment.io to close the decision on the investment idea.

How did Microsoft Teams help the Chief of Staff execute his roles and responsibilities?

- Brainstorm, ideate and collaborate on MURAL within as a digital workspace.
- Analyze feedback data to make informed decisions using visualizations in Qubie.
- Generate and organize ideas to engage employees with Employee Ideas.
- Collaborate with team members on strategic questions without conducting a live meeting or a conference call and accelerate decision-making with Ment.io.

Which app integrations on Teams made it possible?

- MURAL
- Qubie
- Employee Ideas
- Ment.io
The Chief of Staff posts a message in the channel to provide context to the leadership team about the meeting and the objective behind the collaboration.
Hold meetings and screen share using Microsoft Teams brings the entire team together for the discussion. Conversations, action items and relevant documents shared in the meeting thread are accessible right inside Teams.
Chief of Staff – Crowdsourcing Ideas to Promote Collaboration

Brainstorm and collaborate with your team using digital whiteboards such as the Mural board used by the team here. Integrate convenient applications to continue your work seamlessly within Microsoft Teams.

Meeting Notes

- A set of 5 tests to assess the quality of incoming proposals
- Set a timeline for submission
- Mitigate and eliminate the possibility of potential biases
- Set a dedicated space for collecting and scrutinizing ideas
- Share all the proposals with the decision-making committee
Chief of Staff – Crowdsourc Ideas to Promote Collaboration

Improve team collaboration and work effectiveness with real time feedback with Qubie in Teams. Managers and leaders such as the Chief of Staff here can collect feedback from the team and analyze the results to understand where improvements can be made, and quickly.
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.
Enable team members to quickly generate and organize ideas by campaigns with Employee Ideas. Easily review, manage, and vote upon team’s ideas to increase team engagement and morale.
Chief of Staff – Crowdsourcing Ideas to Promote Collaboration

Collaborate with your team regarding strategic questions without conducting a live meeting or even a conference call with Ment.io in Microsoft Teams.
Ment.io in Microsoft Teams provides a simple and flexible structure to your discussion that helps you make a trusted decision faster. The Chief of Staff shares the most favored ideas in the channel and gets a buy-in.
Microsoft Teams
aka.ms/goTeams

Ready to lead?