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.

**Operations**
- Adding Value Proposition to an Existing Property
- Creating an Effective Housekeeping Schedule
- Expanding into Service Apartments Industry
- Creating a New Lunch Menu
- Managing Purchases
- Carrying Out Urgent Repairs
- Incorporating Staff Feedback
- Incident Prevention

**Marketing**
- Preparing for World Series
- Organizing Wine Tasting Event
- Adding QR Code on Product Packaging
- Introducing a New Cruise Destination
- Monitoring Negative Responses

**Business Development and Sales**
- Introducing New Product
- Creating a Loyalty Program
- Identifying and Closing a Major Sales Opportunity
- Forecasting Sales and Conducting Gap Analysis
- Building a Sales Summary
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**Headquarters**
- Coordinating Disaster Response
- Announcing a New Partnership
- Moving Towards Sustainable Development
- Implementing an Effective Operations Strategy

**Human Resources**
- Devising a New Benefit Plan for Employees
- New Employee Training
- Planning a Holiday Giveaway
- Strengthening the Workplace Community
- New Employee Assistance

**Customer Service**
- Generating Customer Satisfaction Index
- Quick and Hassle-free Room Service
- Personalizing Guest Experience
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Information Technology

- Overcoming Booking System Glitch
- Resolving Issues with Company Website
- Troubleshooting & Repairs
- Firmware Updates
- Tracking Inventory
- Bug Management
Operations

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

Operations 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
- Protectively 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

Operations

Senior Vice President

“One word sums up probably the responsibility of any vice-president, and that one word is “to be prepared.”

- Supervise managers and evaluate each department’s performance
- Ensure company policies and procedures are followed by each department
- Report and share information with the board so that they are kept informed

Head Chef

“I often say that I don’t believe I’m a chef. I try to be a storyteller.”

- Control and direct the food preparation process and any other relative activities
- Construct menus with new or existing culinary creations, ensure the variety and quality of the servings
- Approve and polish dishes before they reach the customer

Housekeeping Manager

“Cleanliness becomes more important when godliness is unlikely.”

- Purchase cleaning supplies and equipment
- Work with hotel guests who have specific housekeeping needs
- Coordinate housekeeping needs with other hotel department managers
Meet the Business Decision Makers

Operations

**Regional Manager**

“Efficiency is doing the thing right. Effectiveness is doing the right thing.”

- Achieve business goals and revenue targets
- Oversee daily operations, manage budgets, and set performance objectives
- Determine extent and service quality levels by inspecting facilities

**Property Manager**

“The one word that makes a good manager - decisiveness.”

- Maintain building systems by contracting for maintenance services and supervising repairs
- Attract tenants by advertising vacancies, obtaining referrals from current tenants, explaining advantages of location and services, and showing units
- Contracts with tenants by negotiating leases and collecting security deposit

**Purchase Manager**

“More business is lost every year through neglect than through any other cause.”

- Seek reliable vendors or suppliers to provide quality goods at reasonable prices
- Negotiate prices and contracts
- Review specifications for raw materials, components or equipment
Meet the Business Decision Makers

Operations

Assistant Store Manager

“We want to turn our inventory faster than our people.”

- Monitor use and regulations for all materials, ingredients, and equipment
- In charge of stock replenishment
- Receive and record new stock in material data sheer

Concierge

“There is no hospitality like understanding.”

- Make dining and other reservations for patrons and obtain tickets for events
- Provide information about local features such as shopping, dining, nightlife, and recreational destinations
- Make travel arrangements for sightseeing and other tours
Adding Value Proposition to an Existing Property

Senior Vice President

Scenario Walkthrough

By considering a valuable suggestion and recognizing the growing trends in the industry that indicate patrons prefer properties with wellness centers, Contoso decides to add one to its Seattle location. See how the Senior Vice President collaborates with other management members at Contoso over Microsoft Teams to share relevant information for concrete decision-making with absolute ease.

- Sends out a message to display survey results under the guest satisfaction program using Forms.
- Creates a new channel within the team and sends a message for highlighting the purpose.
- Refers to the market trends related to integrating wellness in hospitality in a 1:1 chat.
- Asks the Legal and Compliance Manager to collect all required permissions for the additional setup.
- Reviews the suggested ideas in a presentation created with Presentations AI.
- Shares a PDF stating the future of wellness in the hospitality sector for reference.

How did Microsoft Teams help the Senior Vice President execute her roles and responsibilities?

- Engage employees and gather immediate response for surveys and feedback with Forms.
- Route regular industry related updates with Bing News.
- Create and design presentations quickly with Presentations AI in Teams.
- Use live captions with speaker attribution to make meetings more inclusive.
- Allow team members to have shared access to information with OneNote.

Which app integrations on Teams made it possible?

- OneNote
- Presentations AI
- Bing News
- Forms
- PDF
Microsoft Teams enables transparent communications through channel conversations. The Senior Vice President posts survey responses in a tab for everyone to access.

Operations – Adding Value Proposition to an Existing Property
Integrated Forms application within Teams helps gather employee feedback and suggestions systematically.
Create dedicated channels to facilitate instant group communication. The Senior Vice President creates a meeting invite to discuss adding a wellness center to the property.
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.
Operations – Adding Value Proposition to an Existing Property

Live captions enable you to keep track of conversations with fine attribution to display who is speaking and when. Here the Senior Vice President enables live captions during the meeting.
Operations – Adding Value Proposition to an Existing Property

OneNote enables collaborative and powerful document creation within Microsoft Teams. Quickly disseminate meeting outcome and notes among team members with OneNote tabs in channels.
Operations – Adding Value Proposition to an Existing Property

Stay up-to-date on current events courtesy of Bing News. Find coverage of local, national and worldwide news, then share it with your co-workers. Senior Vice President shares news articles on a 1:1 chat with the Director.
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.
Create and share powerful presentations in the channels to make conversations meaningful and to offer participants visual representation of key points covered using Presentations AI.
Keep conversations and relevant documents all in one place with Microsoft Teams. The Senior Vice President provides context to her requirement by sharing and continues to interact with her team on the same thread.
Enable quick access of reports, documents online in the cloud with PDF. The Senior Vice President shares PDF to discuss importance of wellness center.
Creating an Effective Housekeeping Schedule

Housekeeping Manager

Scenario Walkthrough

At Contoso, great customer experience is at the heart of all operations. The Housekeeping Manager must ensure the rooms are regularly cleaned and maintained to ensure a pleasant customer experience. She receives a notification from the Front Desk Manager with special housekeeping requests and immediately acts on including these requests in the housekeeping schedule. The Housekeeping Manager leverages tools within Microsoft Teams to create a schedule for the housekeeping staff and stay on top of any issues to ensure that operations continue smoothly.

- Creates a schedule for the housekeeping staff and shares the updated schedule with the staff using Shifts.
- Notifies team members of that updated schedule within a channel and shares the Covid-19 safety procedures via Evernote.
- Receives a room-specific housekeeping request from the Front Desk Manager via 1:1 chat.
- Adds notes regarding the room-specific housekeeping request to the schedule of the assigned housekeeper via Shifts.
- Reaches out to the assigned housekeeper to update her of the schedule via 1:1 chat.

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

- 1:1 chat to reach out to team members to quickly communicate and share files.
- Impactful summaries and share crucial documentation using Evernote for Microsoft Teams.
- Effective channel communication with @mention feature to notify relevant team members.
- Fast and effective time management and communication for teams with Shifts.

Which app integrations on Teams made it possible?

Shifts  |  Evernote
Create, update, and manage shift schedules for your teams with Shifts in Microsoft Teams. The Housekeeping Manager creates schedules for her team using Shifts.
Dedicated teams and channels enable instant group collaboration. The Housekeeping Manager informs her team members about their schedule and pins the room-specific requests in a tab.
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.
Quickly reach out to and chat with co-workers. Take conversations offline from channels for 1:1 discussions. The Front Desk reaches out to the Housekeeping Manager with room-specific request.
Add notes to individual shifts to enable quick, efficient and transparent communication of tasks using the Shifts app. The Housekeeping Manager adds a shift note with a room-specific task.
Use a one-on-one chat or a group chat for conversations that don’t require the entire team. The Housekeeping Manager uses the feature to reach out to her co-worker and updates him about the request made by the Front Desk.
Expanding into Service Apartments Industry

Regional Manager

Scenario Walkthrough

Contoso believes that it is essential to expand their services to serve a wide range of audiences in the Hospitality sector, where they have immense experience and expertise. The Regional Manager communicates Contoso's interest in opening a new service apartment complex in Seattle with team members. He leverages powerful communication tools within Microsoft Teams to coordinate between team members of different departments, an important external agent to work towards the common goal of assessing the feasibility of the plan to open this new service apartment.

• Schedules a meeting and notifies the team of Contoso's plan to open a new service apartment complex in Seattle.
• Adds a Real Estate Agent to the team to help with identifying suitable locations to open the service apartment complex.
• Assigns tasks to team members to ensure that that team seamlessly work towards a common goal using Trello.
• Reviews the market analysis shared by the Financial Analyst using PowerPoint and responds via channel communications.
• Views the customer demographic analysis shared by the Marketing Manager using PowerPoint.
• Discusses the plan with the leadership team and decides the way forward over a Teams call.

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

• Overcome complex set of hurdles & avoid communication gaps with channel meetings.
• Trello in Teams helps smart and efficient task management.
• Build reports, documents, and presentations online in the cloud with office 365 applications like Excel and PowerPoint.
• Look up detailed information about various venues and share them using Places.

Which app integrations on Teams made it possible?

- Excel
- Places
- Trello
- PowerPoint
The Regional Manager sets the expansion plan in motion in the channel, roping in relevant team members to help with planning. He uses the @mention feature to call their attention to his post, which also sends out a notification in their Activity Feed.
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.
The HR Manager uses Excel in Teams to create a list of new hire requirements and uploads it to the Files tab in the channel for peer review. The spreadsheet can be pinned as a tab for quick access, while any edits to the file can be carried out with ease.
The Regional Manager assigns and tracks tasks with a Trello tab in the channel. This provides clarity to the team members regarding the tasks they need to pick up and close out.
Microsoft Teams allows the team to communicate in open-channel conversations and keep team members (and guests) up-to-date. The Real Estate Agent with guest access shares locations using Places app.
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.
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.
Store and share important files within a cloud-enabled repository with Files. Documents such as the PowerPoint containing market research are housed here for the team's easy access.
Private channels in Microsoft Teams create focused spaces for collaboration within your teams. Leadership continues focused conversation on the subject in a private channel.
Creating a New Lunch Menu

Head Chef

Scenario Walkthrough

Preparing a great menu and ensuring that food is of the same great quality across the hotel chain is at the core philosophy at Contoso. The Head Chef prepares a new lunch menu for the week and shares it with other chefs and the Purchase Manager over Microsoft Teams. He schedules a streaming session with the Head Chef of Bellevue so that everyone is brought up-to-speed with the technique and style of the Head Chef at Bellevue.

- Notifies the other chefs and informs them of the live stream that’s scheduled for later in the day via channel communications.
- Shares the lunch menu for the week with the other chefs using Excel.
- @mentions the Restaurant Manager to confirm details regarding discounts within the same conversational thread.
- Creates and assigns tasks to ensure efficient task management using Trello.
- Schedules a channel meeting and notifies all the chefs of the meeting using channel communications.
- Shares a recorded stream of the meeting using Microsoft Stream.

How did Microsoft Teams help the Head Chef execute his roles and responsibilities?

- Create important lists quickly using Excel right inside Teams.
- Effective channel communication with @mention feature for quick updates.
- Productive meeting calls with screen share right inside Teams.
- Integrate Trello to easily assign and execute tasks within the team.
- Store and share recorded meeting with ease using Microsoft Stream.

Which app integrations on Teams made it possible?

- Excel
- Microsoft Stream
- Trello
Microsoft Teams enables transparent communications through channel conversations. The Head Chef communicates in open-channel conversations and kickstarts discussion on over the new lunch menu.
Creating a New Lunch Menu

The Head Chef uses Excel in Teams to create the lunch menu and uploads it to the Files tab in the channel for peer review. The spreadsheet can be pinned as a tab for quick access, while any edits to the file can be carried out with ease.
The Head Chef assigns and tracks tasks with a Trello tab in the channel. This provides clarity to the team members regarding the tasks they need to pick up and close out.
The Head Chef sets up a meeting in the channel to give a live demonstration of cooking a new dish.
Operations – Creating a New Lunch Menu

During a meeting, participants can use rich meeting capabilities such as video, screen sharing, file sharing, meeting notes and chat to make the meeting engaging and productive.
Managing Purchases
Purchase Manager

Scenario Walkthrough

To maintain high standards, Contoso must ensure that its daily requirement of raw ingredients are met with. The Purchase Manager is required to walk the tight rope and maintain balance in quality and costs. She seeks quotes from potential vendors to get the supplies regularly and at reasonable prices and then seeks approval from the Finance Manager after the vendor is finalized.

- Gets a notification on her activity feed when she is mentioned in a conversation.
- Acquires a monthly demand sheet and uses the same to get quotes from new vendors.
- Assigns tasks and tracks progress using Tasks by Planner and To Do.
- Connects with the Finance Manager for budget approval for the added cost.
- Receives an agreement template for the finalized vendor.

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

- Instant collaboration with the team through features like 1:1 chat and channel communication.
- Integrated Microsoft 365 services such as Excel for documentation.
- Smart and efficient task management through Tasks by Planner and To Do.
- Share documents and agreements using PDF.

Which app integrations on Teams made it possible?

Excel  PDF  Tasks by Planner and To Do
Collaborate with your team through channel communications using @mention to tag required personnel and keep conversations around the topic in a single thread.
The Executive Chef submits his monthly requirements in the channel, where the Excel sheet will be stored in the Files tab and a cloud-enabled repository for future reference.
Microsoft Teams conversations are threaded, so users can reply directly in-context to specific conversations, keeping relevant chats grouped together. @mention relevant team members to make sure you grab their attention in real-time.
Meetings can either be scheduled or triggered instantly (using Meet Now). The team gets on a quick call to discuss cost issues and remove roadblocks.
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 Purchase Manager to track tasks, see assignments, status and manage workflows without leaving the application.
Quickly reach out to and chat with co-workers using 1:1 chat. The Purchase Manager reaches out to the Finance Manager for approval and shares new vendor agreement.
Deep integration of Adobe services with Microsoft Teams allows shared access of documents with PDF.
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.
Carrying Out Urgent Repairs
Property Manager

Scenario Walkthrough

At the heritage property site, the Property team’s most important task is to ensure the infrastructure is maintained thoroughly and the property remains safe and sound. Contoso’s on-site Property Manager finds out a part of the building roof is leaking and needs urgent repairs. He coordinates with the Finance team and Legal Manager to get necessary approvals and sets the process rolling.

- Receives 1:1 chat from the Maintenance Crew about roof leakage.
- Prepares Excel sheet to create repairs cost estimate and seeks approval from the Finance team.
- Participates in a meeting with the leadership team to get the necessary approvals.
- Praises Maintenance Crew for spotting the damage in time.

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

- Priority Notification to grab instant attention of the relevant team member.
- Share images instantly using smart camera to highlight damage.
- Excel sheet to prepare expenses budget for repairs.
- Native features like scheduling and holding meetings in a protected environment.
- Send and e-sign documents using integrated Adobe Sign.
- Praise app to send compliments to team members for their exemplary work.

Which app integrations on Teams made it possible?

- Excel
- Praise
An urgent message will notify a person or group repeatedly, every 2 minutes for 20 minutes, or until they read it. A Maintenance Crew member alerts the Property Manager about leaking roof and shares pictures in 1:1 chat.
Operations – Carrying Out Urgent Repairs

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.
The Property Manager uses Excel in Teams to create a budget breakdown and shares it in the channel for review.
Channel conversations keep team members in sync with each other. They enable contextual, structured, data-driven discussions and decision making such as the costs for repairs in this case.
Meet with team members anywhere, anytime. When scheduling meetings, the Finance Manager uses the native scheduling calendar in Teams to find the best available time slots for meeting invitees.
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!
Send acclaim to your employees and coworkers with Praise. Deliver in a chat, or for wider recognition, send it in a channel conversation. As the repairs work is complete, the Property Manager acknowledges how a quick alert from the Maintenance Crew saved the day.
Incorporating Staff Feedback
Assistant Store Manager

Scenario Walkthrough

Contoso Breakfast Station values all customers and strives to improve every aspect of the customer dining experience. The Assistant store manager coordinates with the Cashiers of the branch at Bellevue Square to collate feedback and suggestions to improve the ordering process. He uses applications and tools within Microsoft teams to effectively understand, discuss, and implement recommendations to improve the customer experience at Contoso.

- @mentions the team and notifies them of efforts to improve the billing experience for customers.
- Creates a feedback form and shares it with the team using Forms for Microsoft Teams.
- Schedules a channel meeting with the regional manager to discuss the feedback and suggestions received by the cashiers.
- Views the Minutes of the Meeting shared by the Cashier using OneNote within Microsoft Teams.
- Notifies the team of significant improvements observed in customer satisfaction and appreciates them for their efforts using Praise.

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

- Engage employees and gather an immediate response for surveys and feedback with Forms.
- Integrated OneNote app helps quickly pen meeting MOMs and objectives.
- Overcome complex set of hurdles and avoid communication gaps with channel meetings and conversations.

Which app integrations on Teams made it possible?

- OneNote
- Praise
- Forms
Teams and channels are where you hold meetings, have conversations and work on files together with team members. The Assistant Store Manager seeks suggestions to create better customer experience from the team,
Integrated Forms application within Teams helps the Assistant Store Manager systematically gather employee feedback and suggestions.
Meetings can either be scheduled or triggered instantly (using Meet Now). The store team meets on Teams which persists any conversations and decision taken during the meeting for easy future reference.
Collaborative and powerful document creation with OneNote in Microsoft Teams. Quickly disseminate meeting outcome, notes and action items among team members with OneNote tabs that can be pinned to any channel.
Praise lets you choose between multiple badges allowing you to customize your appreciation based on the occasion. The Assistant Store Manager chooses between multiple badges to express appreciation.
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. Deliver in a chat, or for wider recognition, send it in a channel conversation.
Scenario Walkthrough

An experienced Concierge working in the lobby at Contoso's Seattle location is concerned that a guest's intoxicated behaviour could escalate into irregular operations. She reaches out to the de-escalation expert using urgent messaging and a call over Teams to devise a plan to de-escalate the situation.

- Notifies the De-Escalation Expert of the situation via an urgent message over 1:1 chat and then calls her.
- Helps the guest back to his room and updates team members of the successful de-escalation via a channel meeting.
- Creates and resolves an incident ticket in Zendesk to easily track incidents using Zendesk Support Ticket.
- Receives appreciation from team members for timely action through Praise.
- Creates a task using Tasks by Planner and To Do to meet with the guest later and make sure he has a good experience at the hotel.

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

- Mark a message as important or urgent to make sure that people are repeatedly notified until they respond to a message.
- Instant alerts to necessary departments using Tasks by Planner and To Do for Microsoft Teams.
- Log issues and create incident reports in a shared and easily accessible OneNote notepad.
- Keep track of incident tickets within a channel tab using Zendesk.

Which app integrations on Teams made it possible?

- OneNote
- Praise
- Zendesk
- Tasks by Planner and To Do
If you want to make sure people pay attention to your message, mark it as urgent. To do that, select Set Delivery Options Mark as important button beneath the compose box, and then select Important or Urgent. That adds the word "IMPORTANT!" or "URGENT!" to your message.
An urgent message will notify a person or group repeatedly, every 2 minutes for 20 minutes, or until they read it. The Concierge reaches out to the De-escalation Expert using priority notification feature.
1:1 chat conversations can turn into a call, according to the participants’ convenience. The Concierge and the De-escalation Expert for a call to troubleshoot the issue.
Nothing boosts team confidence more than sending some praise. Efforts by the Concierge and the De-escalation Expert receive acclaim in the channel using Praise app.
Keep track of customer service tickets within a channel tab using the Zendesk Support ticket view. The Concierge updates the status of the resolved ticket which is automatically reflected within the Zendesk tab.
The interactive Tasks by Planner and To Do tab in channels is great for collaborative task management and tracking. The Concierge uses Tasks by Planner and To Do within Teams to track task progress, to mark items off the checklist and to ensure protocol adherence.
Enjoy collaborative and powerful document creation with OneNote in Microsoft Teams. The Concierge creates an incident report using OneNote and shares for review.
Check out how the Marketing team can use Microsoft Teams to keep your business running efficiently and address unexpected situations with confidence.

### Marketing 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
- Protectively 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
Marketing

Marketing Director

“The best way to predict the future is to create it.”

- Evaluate and develop our marketing strategy and marketing plan
- Plan, direct, and coordinate marketing efforts
- Guide the day-to-day activities of the marketing team and marketing manager

Marketing Head

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

- Execute branding activities and marketing communication
- Manage relationship with media and PR agencies
- Oversee overall reach and performance for the organization

Product Manager

“Your most unhappy customers are your greatest source of learning.”

- Define the product vision, strategy and roadmap
- Work closely with engineering, sales, marketing, and support to ensure business case and customer satisfaction goals are met
- Ensure quality product delivery using technical product knowledge or specific domain expertise
Meet the Business Decision Makers
Marketing

Marketing Analyst

“If you believe there is a better way, take the next step in exploring your potential.”

• Forecast and monitor sales trends.
• Gather consumer and competitor data
• Prepare reports for management
• Utilize statistical software for data analysis
Preparing for World Series
Marketing Director

Scenario Walkthrough

After receiving details of the venues that will host the World Series, Contoso prepares for making the most out of it by creating an environment to drive convenience and social interaction at all the venues throughout the event. The Marketing Director kick-starts the marketing efforts to capitalize on the opportunity and build a toolkit to prepare for other such events.

• Creates a channel and mobilizes various marketing efforts, keeping them all in tune with each other.
• Schedules a channel meeting with the marketing and sales crew to coordinate the execution of the marketing plan.
• Prepares a task board for assigning tasks to relevant stakeholders using Priority Matrix.
• Coordinates with Media Specialist to collate artwork, video files, and marketing memos in the channel's Files tab.

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

• Priority Matrix integration in Teams helps stay on track of scheduled tasks.
• PowerPoint helps draft an effective and easily consumable presentation on the proposed branding on venues.
• Applications like PDF enable quick access to documents, reports, and contracts.

Which app integrations on Teams made it possible?

Bing News  PDF  PowerPoint  Priority Matrix
Create dedicated channels to facilitate instant group communication. The Marketing Director creates a new channel to push marketing efforts and shares a news article using Bing News integration.
Channel conversations are a great way to track the status of a project as they can contain everything related to the project: discussion threads, files, and meeting notes. The team collaborates through channel conversations and shares documents such as branding presentation.
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.
The Marketing Director kicks-off planning over an online meeting and the team keeps conversations and relevant documents all in the meeting thread for easy reference.
Plan meetings or keep them impromptu, according to team members’ availability, which reflects in the native scheduling calendar. Hold calls and conferences and share screens with enhanced security.
Share documents like invites using integrated Adobe services. The Marketing Director shares PDF invites in the channel.
The Marketing Director assigns and tracks tasks with a Priority Matrix tab in the channel. This provides complete clarity for the team members regarding the tasks they need to pick up and close out.
Organizing Wine Tasting Event
Marketing Head

Scenario Walkthrough

As a part of their quarterly event plan, Contoso will be hosting a Wine Tasting Event on the front lawn on the 15th of next month. The Marketing Head must coordinate with both internal as well as external stakeholders to ensure the event planning is seamless. See how she collaborates over Microsoft Teams for smooth decision making.

- Schedules a meeting and discusses the event skeleton with respective managers.
- Asks the Event Manager to assign individual tasks to designated stakeholders with Workstreams.ai.
- Acknowledges the guest details of the event shared by the Guest Manager.
- Reviews invite options and approves an invite design.
- Pins a MURAL tab for suggesting ideas over the decoration.

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

- Applications like OneNote, PDF, and Excel enable quick access to notes and documents.
- MURAL empowers collaborating on new ideas to devise a digital media plan in real-time.
- Workstreams.ai integration helps assign and track tasks without switching applications.
- PowerPoint helps draft and present an effective and easily consumable presentation for the team.

Which app integrations on Teams made it possible?
Microsoft Teams enables transparent communications through channel conversations. The Marketing Head communicates in open-channel conversations and informs the team about the upcoming event.
Keep conversations, meetings and relevant documents all in one place with Microsoft Teams. The Marketing Head provides context to the meeting through channel post and continues to interact with her team on the same thread.
When the Marketing Head creates a meeting invite, she can use the native scheduling calendar to check for optimal meeting time for all attendees.
Enjoy collaborative and powerful document creation with OneNote in Microsoft Teams. A team member uses OneNote to create wine list and present it to the team for review.
Marketing – Organizing Wine Tasting Event

Create tasks, add labels, assign tasks to teammates and manage your work in flexible Kanban boards. The Marketing Head can organize and track tasks with the Workstreams.ai tab in any channel in Microsoft Teams.
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.
The Guest Manager submits his guest list in the channel, where the Excel sheet will be stored in the Files cloud-enabled repository.
Collaborate with your team through channel communications using @mention to tag required personnel and keep conversations around the topic in a single thread.
Create and PDF documents right in Microsoft Teams using the Adobe integration. The Marketing Head creates event invite using PDF and shares it in the channel.
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.
Marketing – Organizing Wine Tasting Event

MURAL is your team’s digital workspace for innovation, anytime on any device. The Marketing team uses MURAL to discuss event venue.
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.
Adding QR Code on Product Packaging

Product Manager

Scenario Walkthrough

To reinforce authenticity and enhance brand loyalty, Contoso has decided to add QR codes to one of its product packaging. The code, when scanned, will redirect the customer to the company's website. The customer can know the back story of the product and get other relevant information. This will ultimately bring in transparency and traceability. All of this will be done with the use of a smartphone. See how the Product Manager uses Microsoft Teams to execute this process.

- Posts a message in the dedicated channel for highlighting the purpose.
- Reviews the PowerPoint containing data related to QR code usage in the United States.
- Sends out a meeting invite to discuss on how to go ahead with the QR code generation and addition process.
- Shares a Word document containing the data to be displayed on the website.
- Creates and assigns tasks with Tasks by Planner and To Do.
- Coordinates with the Director for the design approval.

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

- Integrated Microsoft 365 applications like Tasks by Planner and To Do to execute tasks within Teams.
- Quick access to reports, documents online in the cloud with PDF.
- Clear and concise presentations with PowerPoint in Teams.

Which app integrations on Teams made it possible?

- PDF
- PowerPoint
- Tasks by Planner and To Do
- Word
The Product Manager posts a message in the channel to highlight the innovation with product packaging and kickstarts a conversation.
A meeting is scheduled with essential participants in the loop. Scheduling a meeting in the channel serves as an open invite for other interested team members to participate and offer inputs.
Create and share PowerPoint presentations over a Teams call to make meetings meaningful and to offer attendees a visual representation of key points covered.

Also, according to a recent survey by Statista, in the US alone, an estimated 11 Million households will scan a QR Code in 2020. This is on an increase from an estimated 9.76 Million scans in 2018.
Channel conversations are a great way to track the status of a project as they can contain everything related to the project: discussion threads, files, and meeting notes.
Food History: Energy Bars

Definition: a bar-shaped food intended to boost physical energy, typically containing a combination of fats, carbohydrates, and proteins and fortified with vitamins and minerals.

What primarily differentiates energy bars with energy drinks is the lack of caffeine. (And the whole solid versus liquid thing.)

In the short time that energy bars have been around they have transcended from one identity to another. They started out as space food for astronauts, morphed into fuel for athletes, and now they’re used by everyday folks, as a healthful food-on-the-go, able to replace entire meals.

During the developmental years of space travel, getting food that was both fresh and flavorful for astronauts was a huge challenge.

Tang was one of the more successful food items that was brought into space. From there, it made its way to American breakfasts, during a time when only frozen, concentrated juice was available and fresh juice was rare.

Like Tang, energy bars started out in space and made their way to Earth. The first energy bars were called “Space Food Sticks,” released in the late 1960s, and they were manufactured by the Pillsbury Company.

Space Food Sticks were described as, “Non-frozen balanced energy (snacks) in rod form containing nutritionally balanced amounts of carbohydrate, fat, and protein.”

These versatile food bars came in varying flavors, including peanut butter, mint, and orange, and could slide easily into an airtight space in astronauts’ helmets.

Pillsbury, who had been supporting NASA, decided to extend Space Food Sticks to the public market. In doing so, they dropped “Space” from the name during the mid-1970s. Unfortunately, food sticks did not really take off.

Although, around the year 2000, fans of Space Food Sticks wanting to recapture their youth prompted a re-release of the energy bars in 2006.
The Product Manager delegates tasks to team members through channel communication. The @mention feature ensures that team members don’t miss out on messages that need their attention!
Speedy plan mobilization using task assignment and delegation can be done seamlessly using Tasks by Planner and To Do. The app also allows the Product Manager to track tasks, see assignments, status and manage workflows without leaving the application.
Create and share PDF documents right within Microsoft Teams with the deep integration of Adobe and Office 365 services. The Product Manager views QR code placement.
Introducing a New Cruise Destination
Marketing Head

Scenario Walkthrough

Contoso has decided to add another cruise destination to its current offerings. The existing international Caribbean destinations include only the Western Caribbean. Now the Eastern Caribbean Cruise is being introduced, too. The Marketing Head collaborates with the team members over Microsoft Teams to highlight the source, which led to this addition and offer the introductory details of the newly added destination.

• Pins a Power BI tab containing data of the most exciting cruise destinations.
• Shares a Word document containing an overview of the cruise.
• Acknowledges the PDF document from the Marketing Manager comprising of the cruise itinerary
• Uses Lucidchart to display a map-like representation of the route that will be covered on the cruise.
• Refers to meeting notes placed in a OneNote tab.

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

• Power BI dashboards help make data-driven decisions by displaying information in a visual format.
• Word allows document collaboration through established channels.
• PDF enables sharing useful and detailed information with channel members.
• Lucidchart empowers teams to collaborate on new ideas.
• OneNote allows team shared access to the notes taken during the meeting and other information.
Use a dedicated team to prepare and collaborate on a plan of action. The Marketing Head creates an exclusive team for Business Development, Sales and Marketing team members to sync their efforts.
Leverage powerful data visualizations with Power BI in Microsoft Teams. The Marketing Head uses Power BI to share data about the most popular cruise destinations in a channel tab.
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!
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.
Co-author and edit Word documents within Teams. The latest version is accessible to any member on the team as all files are stored in the team's SharePoint site.
Microsoft Teams conversations are threaded so users can reply directly in-context to specific conversations, while keeping relevant discussions and files grouped together.
Marketing – Introducing a New Cruise Destination

Enjoy powerful document creation and editing with integrated Adobe services right inside Teams. Collaborate on team documents easily and store them in Files for each channel.
Marketin[Marketing – Introducing a New Cruise Destination

With Microsoft Teams, the Marketing Head can schedule meetings without difficulty and find the best available times for invitees through the native scheduling calendar. Meeting threads make follow-up conversations a breeze, and even fun!
Complete meeting solutions in Teams support screen sharing, recording, video and audio conferencing. Scheduling Assistant feature suggests times that are optimal for all attendees.
Lucidchart empowers you and your team to collaborate on flowcharts, wireframes, mockups, org charts, and other visuals in real time. The Marketing team uses Lucidchart to create the Itinerary for the new cruise.
Collaborative and powerful document creation with OneNote in Microsoft Teams. Quickly disseminate meeting outcome, notes and action items among team members with OneNote tabs that can be pinned to any channel.
Monitoring Negative Responses
Marketing Analyst

Scenario Walkthrough

A guest at Contoso has complained that the hotel is overcharging him for a pack of nuts. This situation requires the frontline crew to make some difficult decisions while ensuring that they provide the guest with the best possible outcome. Meanwhile, the backlash in social media is carefully monitored and mitigated by the Marketing Analyst. Here’s how the Marketing Analyst goes about his work using powerful features of Microsoft Teams.

• Uses Power Automate to scan social media and automatically save tweets with a hashtag to a SharePoint list within a channel tab.
• Reviews the posts in the channel with other managers to analyze the results of the social media scan.
• Evaluates the negative statements and picks up their sentiments for an analysis.
• Creates a Power BI tab set up in the channel to review the campaigns.

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

• Automate time-consuming and repetitive tasks like monitoring social media for tweets by integrating SharePoint and Twitter with Power Automate.
• Facilitation of data-driven decisions informed by visualizations and scoring in Power BI.
• Overcome complex set of hurdles and avoid communication gaps with channel meetings and conversations.
Use Power Automate to automatically save tweets with a specific hashtag within a SharePoint list. The Marketing Analyst automates a flow to add tweets containing specific hashtags to a SharePoint List using Power Automate.
Create an automated Flow to scan social media for tweets with a specific hashtag and automatically save these tweets within a SharePoint list. Here the Marketing analyst views tweets updated within the SharePoint tab in a channel.
Microsoft Teams conversations are threaded so users can reply directly in-context to specific conversations, while keeping relevant discussions and files grouped together.
Marketing – Monitoring Negative Responses

Use channel conversations to relay updates to team members. The Restaurant Manager posts a quick update for team members informing them that the issue has been resolved.
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.
A Power BI dashboard offers a visually rich view of current and projected data. The Analyst uses Power BI to breakdown the social media scorecard driven by visualizations and scoring in Power BI for Microsoft Teams.
Business Development and Sales

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

Business Development and 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
- Protectively collaborate with teammates on multiple projects from within a single environment

Apps that enable an immersive experience in Teams

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

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

Sales Manager
“I’ve got a great team around me and we’ve all worked hard together to make things happen.”
- Develop strategic sales plans that covers sales, revenue and expense controls
- Track sales goals with the team
- Determine the annual unit and gross-profit plans by analyzing trends and results

Account Manager
“Setting up goals is the first step in turning the invisible into visible.”
- Manage organizational sales by developing a business plan that covers sales, revenue and expense controls
- Meet planned sales goals
- Set up individual sales targets with the sales team
Meet the Business Decision Makers

Business Development and Sales

Business Development Manager

“Each new marketing campaign excites me. Teams helps me stay productive and focused on my tasks.”

- Oversee and develop marketing campaigns
- Conduct research and analyze data to identify and define audiences
- Devise and execute fresh marketing strategies
Introducing New Product

Business Development Manager

Scenario Walkthrough

Keeping into account the increasing demand for healthier food options, Contoso has decided to introduce a new vegan, gluten-free range of products to suit their health-conscious customers. The Business Development Manager expedites a plan to launch the product in the market. But first, he needs to discuss the same with the team and seek necessary approvals.

- Reviews a case study about the changing market trends via Bing News.
- Schedules a meeting to give the team a brief about the new project and to plan the way forward.
- Assigns Market Analyst to draft Feasibility Study and Profitability Analysis for evaluating the value of the new product.
- Reviews the analysis reports right within Teams.

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

- Bing News helps keep the team in the loop and engage them with relevant and latest industry practices and trends.
- Word application enables creating and reviewing various documents and reports right within Microsoft Teams.
- Note-taking in a group OneNote allows team members to have shared access to the information.
- Turn complex data into powerful, visual graphics to make informed and data-driven decisions using Power BI within a channel.

Which app integrations on Teams made it possible?
Stay up-to-date on current events courtesy of Bing News. Find coverage of local, national and worldwide news, then share it with your team members.
The Business Development Manager sets up a discussion in motion in the channel, roping in relevant team members to help with making healthier products. He uses the @mention feature to call their attention to her post, which also sends out a notification in their Activity Feed.
A team associate 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.
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.
With Microsoft Teams, the Business Development Manager can schedule meetings without difficulty and find the best available times for invitees through the native scheduling calendar.
Keep conversations, meetings and relevant documents all in one place with Microsoft Teams. The Business Development Manager provides context to the meeting through channel post and continues to interact with his team on the same thread.
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.
Business Development and Sales – Introducing New Product

Enjoy powerful document creation and editing with Word. Store team documents easily within the Files tab of the channel.

Feasibility Study For New Range of Products

Table of Contents
1. Executive Summary
2. Description of Products and Services
3. Technology Considerations
4. Product/Service Marketplace
5. Marketing Strategy
6. Organization and Staffing
7. Schedule
8. Financial Projections
9. Findings and Recommendations

1. Executive Summary

Contoso Foods is a leader in the sales of snacks throughout the United States. Contoso’s products are sold in 5000 stores throughout the country and maintain a reputation for superior taste and quality. While sales have grown over the past 10 years, the rate of growth has slowed significantly. One key factor for this slowing growth rate is the shift in the marketplace toward purchasing healthier snacks. While Contoso maintains a healthy ratio, it is not completely vegan yet. Contoso’s sales occur only in its brick and mortar facilities and the company is losing potential customers to competitors who provide vegan, gluten-free options. The marketplace is healthy and shows a continued growth trajectory over the next five to ten years. Contoso is in a position to capitalize on this marketplace by leveraging available technologies, industry best practices, and an
Build dynamic data visualizations, measure metrics, and track analytics through Power BI within Teams. The Business Development Manager can dive into this wealth of analytical data shared using Power BI.
Creating a Loyalty Program
Business Development Manager

Scenario Walkthrough

Contoso wants to add Fabrikam Airlines as a partner to its loyalty program. Fabrikam is very picky about the programs they join, and Contoso must work to create a superior offer to win over Fabrikam. The Business Development Manager contacts the Marketing team and evaluates to see if this is a worthwhile opportunity. See how he leverages various features of Microsoft Teams while performing his tasks.

• Reviews a Freehand by InVision board with marketing model for the campaign based on the data.
• Collaborates with the Operations Manager over channel and 1:1 communication to compile data specific to member preferences and habits in an Excel spreadsheet.
• Highlights Contoso’s value proposition for its loyalty program members in the proposal.
• Presents the proposal using Adobe Sign with guest access for Fabrikam decision makers.

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

• Adobe Sign helps in sharing of contracts without leaving the Teams interface.
• Freehand by InVision whiteboard aids in brainstorming, ideating and collaborating in real time.
• PowerPoint in Teams help to draft effective presentations.
• Track important live analytics within a channel using Power BI for Microsoft Teams.
• Office applications like Excel for quick access to shared reports and information.
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,
During the meeting, the Business Development Manager and his team present the value of partnership with Fabrikam using PowerPoint.
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 Business development Manager and the Operations Manager.
Collaborate, ideate and draft solutions on an infinite white boarding space with Freehand by InVision in Teams. The Business Development Manager brainstorms with the team using Freehand by InVision.
Microsoft Teams conversations are threaded so users can reply directly in-context to specific conversations, while keeping relevant discussions and files grouped together.
The team member uses Excel to build and present data to the team. Create impactful summaries of crucial data with Excel, Word and OneNote for Microsoft Teams.

### Fabrikam Airlines

#### Customer Loyalty Program Analysis

<table>
<thead>
<tr>
<th>4/18/2020</th>
<th>Homies</th>
<th>Rascotes</th>
<th>Homies &amp; Rascotes</th>
<th>Overall</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Customer Activity:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number of active customers—Beginning of period</td>
<td>4000</td>
<td>10000</td>
<td>14000</td>
<td>28000</td>
</tr>
<tr>
<td>Number of customers added</td>
<td>3000</td>
<td>5000</td>
<td>8000</td>
<td>16000</td>
</tr>
<tr>
<td>Number of customers lost/terminated</td>
<td>1000</td>
<td>2000</td>
<td>3000</td>
<td>6000</td>
</tr>
<tr>
<td>Number of active customers—End of period</td>
<td>6000</td>
<td>13000</td>
<td>21000</td>
<td>50000</td>
</tr>
<tr>
<td><strong>Preferences &amp; Habits:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Overall revenue</td>
<td>$5,000.00</td>
<td>$10,000.00</td>
<td>$15,000.00</td>
<td>$30,000.00</td>
</tr>
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<td>% booked through homepage</td>
<td>26%</td>
<td>32%</td>
<td>30%</td>
<td>68%</td>
</tr>
<tr>
<td>% booked through 3rd party</td>
<td>45%</td>
<td>38%</td>
<td>78%</td>
<td></td>
</tr>
<tr>
<td><strong>Cost of sales:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ongoing service and support costs</td>
<td>$1,000,000.00</td>
<td>$1,400,000.00</td>
<td>$1,400,000.00</td>
<td>$3,800,000.00</td>
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<tr>
<td>Other direct customer costs</td>
<td>$200,000.00</td>
<td>$100,000.00</td>
<td>$100,000.00</td>
<td>$400,000.00</td>
</tr>
<tr>
<td>Total cost of sales</td>
<td>$1,200,000.00</td>
<td>$1,500,000.00</td>
<td>$1,500,000.00</td>
<td>$4,200,000.00</td>
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<tr>
<td>Gross margin</td>
<td>($1,195,000.00)</td>
<td>($1,490,000.00)</td>
<td>($1,405,000.00)</td>
<td>($4,170,000.00)</td>
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<tr>
<td>Weighting</td>
<td>28%</td>
<td>36%</td>
<td>36%</td>
<td>100%</td>
</tr>
<tr>
<td><strong>Other Costs:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Customer acquisition</td>
<td>$100,000.00</td>
<td>$120,000.00</td>
<td>$235,000.00</td>
<td>$460,000.00</td>
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<tr>
<td>Customer marketing</td>
<td>$150,000.00</td>
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<td>$550,000.00</td>
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<td>Customer retention</td>
<td>$60,000.00</td>
<td>$190,000.00</td>
<td>$400,000.00</td>
<td>$410,000.00</td>
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<tr>
<td>Total other customer costs</td>
<td>$350,000.00</td>
<td>$565,000.00</td>
<td>$605,000.00</td>
<td>$1,320,000.00</td>
</tr>
<tr>
<td>Customer profitability segment</td>
<td>($1,520,000.00)</td>
<td>($1,972,000.00)</td>
<td>($2,135,000.00)</td>
<td>($5,590,000.00)</td>
</tr>
<tr>
<td>Weighting</td>
<td>27%</td>
<td>34%</td>
<td>30%</td>
<td>100%</td>
</tr>
<tr>
<td><strong>Summary Metrics:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Affordability</td>
<td>24%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Luxury</td>
<td>11%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Service</td>
<td>13%</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
He decides to highlight Contoso’s value proposition - its loyalty program members - in the proposal. His team uses this data shared using Excel in a channel conversation to build a Power BI summary for him.
Business Development and Sales – Creating a Loyalty Program

The Business Development Manager uses a dedicated team to prepare and offer the final proposal for partnership. A team can even include external members through guest access.
Adobe Sign in Teams lets you set your sights on the entire document process with real-time tracking. You’ll get notified when documents have been signed, check what is out for signatures, signed, or waiting for signatures, and send out reminders for overdue approvals.
Identifying and Closing a Major Sales Opportunity

Account Manager

Scenario Walkthrough

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

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

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

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

Which app integrations on Teams made it possible?

- Calendar BOT
- Woobot
- Module Q
- PowerPoint
- Praise
Model Q finds content relevant to your current priorities by scouring external and internal content sources, such as news, collateral, and experts. The Q bot delivers what you need in your chat feed.
The Sales Manager kicks-off discussion over an opportunity and triggers an instant meeting using Meet Now feature. The team keeps conversations and relevant documents all in the meeting thread for easy reference.
The Sales Manager reaches out to a Contoso representative using 1:1 chat. Use this feature when you don’t need the whole team.
Compare open times on your calendar to open times on any of your Approved Contact's calendars using Calendar bot. The Sales Manager uses the bot to schedule meeting with Contoso representative.
Access critical Salesforce CRM data in real-time and keep your team updated of important sales developments with Woobot. The Sales manager uses Woobot to update the lead status and notify the team of the meeting scheduled.
Channel conversations are a great way to track the status of a project as they can contain everything related to the project: discussion threads, files, and meeting notes. A PowerPoint presentation is shared to elaborate on solutions for Contoso.
Store and share important files within a cloud-enabled repository with Files. Informative documents such as the PowerPoint discussing chatbot solutions are housed here for the team's easy access.
During a meeting, the participants can use rich meeting capabilities such as video, screen sharing, file sharing, meeting notes and chat to make the meeting engaging and productive. Needless to say, meetings are fully supported on mobile clients too!
With Woobot, you can forecast with precision, and nurture important opportunities from creation to close in any team. The Sales Manager uses Woobot to update the team of winning and closing the sales opportunity.
Forecasting Sales and Conducting Gap Analysis

Sales Analyst

Scenario Walkthrough

The upcoming World Series will be one of the biggest opportunities for Contoso, and the sales team must make the most of it. But to ensure that Contoso does not lose out in case of any unforeseen circumstances, the Sales Analyst is required to create a fail-safe forecast and gap analysis. See how he uses the collaborative platform of Microsoft Teams to create one.

- Creates a channel for the purpose within the Sales team and sends a welcome message.
- Sends out a meeting invite to discuss forecasts, actual outcome, and competitor strategies.
- Configures a monday.com meeting tab to assign tasks to team members to work on gap analysis.
- Team members use a shared Excel to build out the gap analysis and use PowerPoint for ease of data consumption.
- Reviews the report in PowerPoint and requests changes to forward the final draft to the leadership team.
- Adds his suggestions to the collaborative OneNote tab pinned for notetaking.
- Acknowledges the Word document containing the preparedness for event disruption.

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

- Build reports, documents, and presentations online in the cloud with Excel and PowerPoint.
- Organize, structure, and streamline tasks using monday.com.
- Harness the power of Office applications like Word and OneNote within Teams to document necessary information.

Which app integrations on Teams made it possible:

- PowerPoint
- OneNote
- Excel
- Word
- monday.com

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Meeting organizers can configure applications, share a description of the meeting and invite multiple participants within and outside their organization for productive and engaging meetings.
Use tabs to configure relevant apps for your meeting. The Sales Analyst configures monday.com in a meeting to create, assign, track and discuss tasks during the meeting.
monday.com in meetings makes it easy for meeting participants to create tasks, discuss them, track progress, and more without leaving the meeting interface. This makes it easy for the meeting participants to maintain context during discussions.
Meeting chats allow organizers and participants to collaborate before, during, and after the meeting over chat. Participants can go back to a meeting chat to access files shared and apps configured during within the meeting chat.
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. Tasks created during a meeting are reflected within the monday.com meeting tab.
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.
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.
Create and share PowerPoint presentations over a Teams call to make meetings meaningful and to offer attendees a visual representation of key points covered.
Keep conversations and relevant documents all in one place with Microsoft Teams. The Sales Analyst provides context to his requirement by sharing and continues to interact with her team on the same thread.
Collaborative and powerful document creation with OneNote in Microsoft Teams. Quickly disseminate meeting outcome and notes among team members with OneNote tabs in channels.
Enjoy powerful document creation and editing with Word. Store team documents easily within the Files tab of the channel.
Building a Sales Summary

Sales Manager

Scenario Walkthrough

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

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

How did Microsoft Teams help the Sales Manager execute his 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 statistics and projections easily using Smartsheet.
• Share documents, slide decks, and materials through the Files tab repository.

Which app integrations on Teams made it possible?

Evernote

Smartsheet
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.
He 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.
Enjoy collaborative and powerful document creation with Evernote in Microsoft Teams. Quickly disseminate meeting outcome and notes among team members with Evernote tabs in channels.
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!
The team member uses Smartsheet to build and present data to the team. Create impactful summaries of crucial data with Smartsheet for Microsoft Teams.
Headquarters

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

Headquarters 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
- Protectively 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

Headquarters

Director

"If I’ve said it once, I’ve said it a hundred times: Be prepared!"

- Handle business decisions and strategic planning of the company
- Collaborate with leaders of all departments, especially for high priority activities
- Act as an official spokesperson for the facility and its media relations

HR Manager

“In order to build a rewarding employee experience, you need to understand what matters most to your people."

- Plan, direct, and coordinate the administrative functions of an organization
- Oversee an organization’s recruitment, interview, selection, and hiring processes
- Handle staffing issues, such as mediating disputes and directing disciplinary procedures

Chief Operating Officer

“Our business is about technology, yes. But it's also about operations and customer relationships."

- Design and implement business operations
- Establish policies that promote company culture and vision
- Oversee operations of the company and the work of executives
Coordinating Disaster Response Preparedness
Director

Scenario Walkthrough

Safety and emergency preparedness are fundamental protocols in Contoso. Supported by the organizing and collaborative assistance of Microsoft Teams and integrating various applications, Contoso runs a multi-faceted simulation to test the emergency preparedness of the organization, achieving impressive results. Here's how the Director uses Microsoft Teams to resolve the issue successfully.

• Creates a collaborative OneNote tab that lays out a comprehensive plan of what to do in the event of an earthquake.
• Coordinates the planning and execution of the emergency drill with other team members and security personnel.
• Sets up a team meeting to finalize the POCs for a real-time emergency and shares the same via Crisis Communication app.
• Creates a channel and adds managers to capture their POCs and have their employees sign up for the simulation via Forms.
• Shares all the related documents via a SharePoint link for enabling shared access.
• Uses Company Communicator to inform all the employees about the drill.

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

• Gather meeting notes in OneNote.
• Crisis Communication app provides a user-friendly experience to connect users with information about a crisis.
• Keep track of volunteer sign-ups and many other forms with Forms.
• Enable shared access of documents by adding SharePoint to Microsoft Teams.

Which app integrations on Teams made it possible?

- OneNote
- SharePoint
- Crisis Communication
- Company Communicator
- Forms
- Custom
Use channel conversations to relay updates to team members and begin a process flow for task completion. The Director kick-starts a process flow and defines the participants that will take the process forward.
Collaborative and powerful document creation with OneNote in Microsoft Teams. Quickly disseminate meeting outcome, notes and action items among team members with OneNote tabs that can be pinned to any channel.
Use the meeting thread for follow-up conversation about meeting outcomes. The Director schedules a meeting to discuss the preparations and continues to interact on the meeting thread.
Use the Crisis Communication admin app to moderate, upload, share and manage features and content within the Crisis Communication app. The Director access the Crisis Communication admin app pinned within a channel tab.
View, add and edit the emergency contacts visible to the entire organization within the Crisis Communication admin app that is accessible only to approved administrators. The Director views the list of emergency contacts within the Crisis Communication admin app that’s pinned as a channel tab.
Use the Crisis Communication admin app to update details and share critical information with your team. The Director uses the Crisis Communication admin app to add emergency contacts for the simulation exercise.
Manage and coordinate across teams within an organization during a crisis using the Crisis Communication app. The Director accesses the company news, world news and other important information shared across the organization.
View emergency contacts and other crucial information shared with the entire organization using the Crisis Communication app. The Director reviews the emergency contacts shared within the Crisis Communication app for the emergency drill.
The Director collaborates with the Planning team and shares a link within the channel conversation.
Share and manage content, knowledge, and applications to quickly find information, and seamlessly collaborate across the organization with SharePoint. The Director pins a SharePoint document library tab for shared access to critical training documents.
Microsoft Teams enables transparent communications through channel conversations. The PR Manager communicates in open-channel conversations and keeps team members up-to-date.
@mention a person, channel or team to make sure your message reaches the relevant personnel. More volunteers are needed for the simulation exercise and relevant personnel are roped into the conversation using the @mention feature.
Integrated Forms application within Teams helps the Planning team systematically gather volunteer details and create a list.
Have something to share broadly? Reach your employees where they collaborate! The Company Communicator app arms your Microsoft Teams environment with corporate communication and group broadcast capabilities.
The Director can compose a rich message completely within the Teams interface and control the targeting of the message to individual users or channels in different teams. In addition, messages can be scheduled for delivery as well.
Rich messages with summary view and detailed information along with in-the-moment actions such as Acknowledge is sent out to teams of choice and their responses tracked over Teams.
The Company Communicator custom app is empowered with capabilities to gather analytics on audience engagement as well as track read acknowledgement and view count of likes and responses to each message sent using the app.
Announcing a New Partnership

Director

Scenario Walkthrough

Contoso gains a partnership with an airline for their loyalty program. The Business Development team is excited to begin working with the Fabrikam brand, but first, the Director must roll-out news of the partnership in an organization-wide communication.

• Sends a 1:1 chat message to Business Development Manager congratulating the team’s efforts.
• Receives the partnership proposal Word document.
• Sends a broadcast message with details about the partnership using the Company Communicator custom app.
• Team members across the board respond to the broadcast enthusiastically.
• Company Communicator custom app allows tracking the engagement on the message broadcasted.

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

• Keep conversations private and quick where they need to be.
• Harness the power of applications within Teams to achieve better business outcomes.
• Leverage corporate communication and the group broadcast capabilities of the Company Communicator app within Teams.
• Use Office tools such as Word, cohesively from one platform without saving multiple versions locally.

Which app integrations on Teams made it possible?

- Word
- Custom Company Communicator
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 Director and the Business Development Manager.
Headquarters – Announcing a New Partnership

Enjoy powerful document creation and editing with Word. Store team documents easily within the Files tab of the channel.
The Company Communicator app delivers messages meticulously to individual users in 1:1 chats or as channel messages in one or more teams. The message becomes a conversation starter for further engagement!
Scenario Walkthrough

The waste generation statistics are a cause of worry for Contoso, and the leadership finds that one of Contoso's locations has been making great efforts in reducing waste generation. As a responsibility to contribute towards sustainable development, Contoso has decided to reduce the waste, which is sent to landfill by 20 percent by the end of this year. To make an announcement for the same and learn about how the location is doing it, the HR Manager plans a townhall meeting. See how the HR Manager uses Microsoft Teams to send this communication across effortlessly.

- Receives a 1:1 chat message from the Director to arrange a townhall to address all the employees at the same.
- Sends a company-wide message with details about the pursuit using Communities.
- Pins a Power BI tab showing waste generation at different Contoso properties.
- Pins a OneNote tab containing the meeting agenda and other related details.
- Shares a Word document with ways to reduce waste across all properties.

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

- Enable sharing useful and detailed information with channel members using PDF.
- Route regular industry related updates with Bing News.
- Enable document collaboration and information sharing OneNote and Word.
- Utilize Power BI to compile and review data in a highly visual format.
- Drive engagement in your organization through Yammer communities.

Which app integrations on Teams made it possible?
The Director kickstarts a discussion for a better waste disposal plan in the channel, roping in relevant team members. He uses the @mention feature to call the team's attention to his post, which also sends out a notification in their Activity Feed.
Share useful and detailed information with channel members with PDF right within Microsoft Teams. The Director shares a PDF detailing waste production in the US.
Quickly reach out to and chat with co-workers. Take conversations away from channels for 1:1 discussions. The HR Manager gets an update from the Director about the townhall planning.
Have something to share broadly? Reach your employees where they collaborate! Drive engagement in your organization through Yammer communities.
The HR Manager posts a message in the channel to provide the team context about the town hall and shares the agenda in a OneNote tab.
Enjoy collaborative and powerful document creation with OneNote in Microsoft Teams. The HR Manager shares the town hall agenda using a OneNote tab.
Microsoft Teams live events are an extension of Teams meetings that enable you to schedule and produce events that stream to large online audiences. The HR Manager uses the live events feature to schedule an event.
Organizers can configure permissions for the live event, enable Q&A for the event and customize other permissions based on their requirements.
The HR 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.
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.
Why we should reduce waste?

It is increasingly difficult and expensive to dispose of waste
A hotel guest generates about 1kg (2lb) of waste per night, more than half of it in paper, plastic and cardboard. In addition to negative environmental impact, as landfill capacity diminishes, so the cost of waste disposal becomes more expensive.

It creates huge environmental problems
Landfilling not only takes up valuable land space but causes air, water and soil pollution, discharging carbon dioxide (CO2) and methane into the atmosphere and chemicals and pesticides into the earth and groundwater. In addition, waste often must travel long distances to the landfill site, consuming fuel and contributing to greenhouse gas emissions.

To meet tougher government legislation
National and local governments are introducing more stringent requirements with regards to waste disposal to landfill and recycling, and the hotel industry must respond to these high green standards.

It is an inefficient resource use
Often it is more resource-efficient to make new products by recycling rather than starting from scratch. For example, recycling used aluminium tins into new tins requires 95% less energy than processing bauxite ore into aluminium. Many discarded materials, such as furniture and food, also have value.

It makes good business sense
- When supplies are used more efficiently, it saves money on raw materials.
- Income can be generated by selling old equipment and reusing or recycling valuable waste materials.
- Waste disposal costs fall as the amount of waste you produce decreases.

Pat Maher, a former hotel executive now serving as an environmental consultant to the American Hotel and Lodging Association, says that good waste management and recycling is an effective public relations tool, because it shows a dedication to corporate responsibility with environmental policy. “Doing in-room recycling is important because the guest sees that,” he says. Also, by removing paper, plastic and other recyclables from their waste, hotels can trim their disposal bill by as much as 50% — a significant savings in cities where waste removal is expensive. “In New York City, it’s not unusual to have a $100,000-a-year waste bill,” says Maher, “and if you can cut that by $50,000, that’s a big deal to the operator of a hotel.”

Managing your waste in a sustainable manner

There are several options for managing your waste in a more sustainable manner and the waste hierarchy, outlined below, provides a very useful route map to encourage better practices.

- Prevention
- Preparing for reuse

Enjoy powerful document creation and editing with Word. Store team documents easily within the Files tab of the channel.
Implementing an Effective Operations Strategy

Chief Operating Officer

Scenario Walkthrough

Contoso is a multi-national hospitality company that has recently merged assets and operations with Fabrikam Hospitality to expand its presence in the East. The Chief Operating Officer at Contoso reaches out to members of the team at Contoso and Fabrikam to chalk out an effective operations strategy. She works with other team members to analyze the impact of the merger, prioritize workstreams, and ensure high-level coordination across assets and resources.

- Schedules a channel meeting with team members from Contoso and Fabrikam to discuss the task at hand.
- Responds to the Operations Manager and clarifies key details regarding analytics being put together via 1:1 chat.
- Reviews a dashboard showing the combined assets and resources of Contoso and Fabrikam after the merger using Power BI.
- Reviews the marketing strategy shared by the Chief Marketing Officer using PowerPoint.
- Schedules a channel meeting with the entire leadership team of Contoso and Fabrikam and presents the final operations strategy over a Teams Call.

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

- Hold meetings using Microsoft Teams to keep everyone informed & aligned.
- Build reports, documents, and presentations online in the cloud with Excel and PowerPoint.
- Create and analyze data with rich visual representations using Power BI.
- Use 1:1 chat for quick communication with relevant team members.

Which app integrations on Teams made it possible?

Power BI
PowerPoint
A team brings together a group of people for work, projects, or common interests. The Chief Operating Officer uses a dedicated team to chalk out an effective strategy post-merger.
Microsoft Teams is a great way to schedule meetings, especially if the participants don’t all work in the same geographic area. It seamlessly integrates scheduling, invitations, updates and access to virtual meetings.
Use a one-on-one chat or a group chat for conversations that don’t require the entire team.

A team associate reaches out to the Chief operating Officer using 1:1 chat.
Microsoft Teams conversations are threaded so users can reply directly in-context to specific conversations, while keeping relevant discussions and files grouped together.
Build dynamic data visualizations, measure metrics, and track analytics through Power BI within Teams. The Chief Operating Officer can dive into this wealth of analytical data shared using Power BI.
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.
Keep conversations and relevant documents all in one place with Microsoft Teams. The Chief Operating Officer shares the strategy and continues to interact with her team on the same thread.
Create and share PowerPoint presentations over a Teams call to make meetings meaningful and to offer attendees a visual representation of key points covered.
Human Resources

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

Human Resource 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
- Protectively collaborate with teammates on multiple projects from within a single environment

Apps that enable an immersive experience in Teams

- Word
- Excel
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- OneNote
- Asana
- monday.com
- Forms
- Power BI
- Lucidchart
- Trello
- Shifts
- MURAL
- Smartsheet
- Presentations AI
- Teamwork
- Adobe Sign
- Tasks by Planner and To Do
- Communities
<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
<th>Focus Areas</th>
</tr>
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</table>
| Server       | "Whenever you serve someone from your heart, the food tastes so much better." | • Preparing restaurant tables with special attention to sanitation and order  
                • Attending to customers upon entrance to the restaurant  
                • Presenting menus, serving and helping customers select food/beverage |
| HR Manager   | "I believe the work environment should be a safe and conducive space to do one’s best." | • Develop and implement HR initiatives aligned with overall business strategy  
                • Oversee an organization’s hiring processes  
                • Bridge management and employee relations by addressing demands, grievances or other issues |
| HR Head      | "When people go to work, they shouldn’t have to leave their hearts at home." | • Responsible for the smooth and profitable operation of a company’s human resources department  
                • Supervise and provide consultation to management on strategic staffing plans, benefits and training  
                • Overseeing payroll and performance evaluation systems |
Meet the Business Decision Makers
Human Resources

Housekeeper

“Great service creates great guest advocates for your hotel.”

- Performing a variety of cleaning activities such as sweeping, mopping, dusting and polishing
- Ensuring all rooms are cared for and inspected according to standards
- Protecting equipment and making sure there are no inadequacies
Devising New Benefit Plan for Employees

HR Manager

Scenario Walkthrough

Contoso feels that its employees and on-site workers are its biggest assets. They firmly believe that people on the field should be given special perks and benefits to encourage them for better performance. The HR manager works with her team using Microsoft Teams to identify new benefits for these employees.

- Schedules a meeting to discuss the perks that can be offered to improve the employee satisfaction.
- Collects responses from employees with a survey employing Forms.
- Identifies the best perks that can be offered to the frontline workers.
- Reviews an analysis shared by the Finance Manager using Excel.

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

- Excel helps to share important statistics for decision making right within Microsoft teams.
- Forms enable gathering immediate responses from team members to support a new project.
- OneNote acts as a shared notebook among team members to highlight features and comparisons between products.

Which app integrations on Teams made it possible?

- OneNote
- Excel
- Forms
Channel conversations and GIFs are a great way to keep your core team engaged for planning and disseminating information. The HR Manager uses channel communication to schedule a meeting and discuss new benefits for employees.
Complete meeting solutions in Teams support screen sharing, recording, video and audio conferencing. Scheduling Assistant feature suggests times that are optimal for all attendees.
Dedicated teams and channels enable instant group collaboration. The HR Manager uses a planning channel to strategize incentivizing frontline workers.
Integrated Forms application within Teams helps systematically gather employee feedback and suggestions. The HR Manager creates a Forms survey to collect relevant information in a bid to solidify the incentive plan for the frontline workers.
Close out conversations in channels once your project objectives have been achieved. The files shared during the discussions will stay safely hosted within the Files tab in the channel.
The Sales Representative submits his report in the channel, where the Excel sheet will be stored in the Files cloud-enabled repository for future reference.
Ideas that gain a lot of traction and discussion are documented in the pinned OneNote tab in the channel for the HR team's quick reference.

- Best Performer of the Month – Bonus
- Best Performer of the Quarter - Stock Options
- Best Performer of the Year – Gift Vouchers
- Best Overall Performance – Free Holiday
Scenario Walkthrough

Joining a new organization and understanding the workflow and processes can be a little challenging in the beginning. The new employee can easily go through the onboarding process with the ease of all the varied applications available on Microsoft Teams to welcome the employee in the organization.

- Receives a welcome message to start the onboarding process via Hibob.
- Responds to the manager who shares the training material with all the new employees via channel communications.
- Views the employee training material using PowerPoint within Microsoft Teams.
- Gets on a call with the team to understand the workflow via channel meetings.
- Views the message that was broadcasted to the entire team regarding precautionary measures via Dynamic Signal.

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

- Stay up to date on company events, manage attendance and get to know co-workers using Hibob.
- View broadcast of company content sent to the organisation using Dynamic Signal.
- Access training documents through a Files tab.
- Overcome complex set of hurdles and avoid communication gaps with channel meetings and conversations.

Which app integrations on Teams made it possible?

- PowerPoint
- Dynamic Signal
- Hibob
Use Hibob and personalize onboarding to fuel a sense of belonging from day one. The new employee gets an invitation for onboarding through Hibob.
Microsoft Teams enables transparent communications through channel conversations. The HR Manager welcomes the new employee and takes him through the onboarding 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.
Channel conversations can contain a lot things – conversations, files shared by team members, meeting threads, and GIFs! Use social features like reacting to team members’ conversations and responses to acknowledge them.
Meetings are not meant for discussions alone in Teams! Train team members anywhere, anytime and schedule meetings with ease through the native scheduling calendar. Meeting threads in channels allow conversations before and after the meeting.
Dynamic Signal provides a news feed of content that lives inside of Microsoft Teams. The HR Manager can even track who is reading what content to measure the communication reach.
Planning a Holiday Giveaway

HR Manager

Scenario Walkthrough

Contoso believes in a happy work environment for its employees. The holiday season warrants a celebration, and the HR and Finance team members work together to find room in the Contoso budget for employee giveaways during the festive season. The HR and Finance teams come together to ensure the smooth execution of the holiday giveaway scheme. Here’s how the HR Manager uses Microsoft Teams to ideate and rolls out the action plan.

- Sets up an Employee Engagement channel to get ideas and suggestions for an upcoming giveaway.
- Schedules a channel meeting to discuss gifting ideas for the holiday giveaway.
- Views the list of Ideas discussed during the meeting via OneNote within a channel tab.
- Creates a poll using Polly for suggestions that appear consistently.
- Uses the @mention feature, to send a notification to the Finance Associate to allocate a budget.
- Views the final budget shared by the Finance Associate using Excel for Microsoft Teams.

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

- @mention feature helps keep track of essential conversation that requires the manager’s attention or response.
- Integrated OneNote app helps quickly pen meeting MOMs and valuable takeaways.
- Integrated Excel tab gives quick access to the budget plan.
- Create polls to gather suggestions quickly and easily with Polly.

Which app integrations on Teams made it possible?

Excel OneNote Polly
The HR Manager sets the holiday plan in motion in the channel, roping in relevant team members to help with budget planning. She uses the @mention feature to call their attention to her post, which also sends out a notification in their Activity Feed.
The HR Manager kicks-off planning over an online meeting and the team keeps conversations and relevant documents all in the meeting thread for easy reference.
Plan meetings or keep them impromptu, according to team members’ availability, which reflects in the native scheduling calendar. Hold calls and conferences and share screens with enhanced security.
Record meeting notes or observations in OneNote app inside Teams and share them when needed with the team for their reference. The HR Manager keeps track of gifting ideas in a OneNote tab.
Use channel conversations to relay updates to team members and begin a process flow for task completion. The HR Manager seeks a poll to find preferred gift ideas.
Polly is a polling solution that works within Microsoft Teams where your team works best. Intuitive polls designed to help you do your best work!
The HR Manager begins a new conversation thread when she needs to discuss special perks for frontline workers. She @mentions the channel to get everyone’s attention, and gets a quick response, thanks to open-channel communication.
The Finance Associate uses Excel in Teams to create a budget breakdown and uploads it to the Files tab in the channel for peer review. The spreadsheet can be pinned as a tab for quick access, while any edits to the file can be carried out with ease.
The Finance Associate uses Excel to build and present data to the team. Create impactful summaries of crucial data with Excel, Word and OneNote for Microsoft Teams.

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Strengthening the Workplace Community

HR Head

Scenario Walkthrough

Recently, there have been whispers going around that one of the most prestigious hotel chains in the country ‘Contoso Group’ is shutting down one of their locations. Rumours even have it that this could lead to major layoffs. Employees are concerned, and this has taken a severe toll on their productivity at work. See how the HR Head uses Microsoft Teams to address the issue and communicating with them directly.

• Engages Forms to conduct a quick survey to know the mood of the employees.
• Uses Power BI to showcase bar graphs of the diminishing employee morale and productivity since the last month.
• A Townhall is conducted within Teams to address the rumors and to announce the expansion plans.
• Another analysis is conducted on the staff members to understand their mood after the announcement.

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

• Forms helps collect feedback and responses for a critical analysis.
• Address the whole organization together on one platform to communicate easily and effectively through a Townhall.
• Facilitation of data-driven decisions informed by visualizations and scoring in Power BI for Microsoft Teams.

Which app integrations on Teams made it possible?

Forms
Power BI
Get started with conversations to gain your team's perspective on trends you see within the organization. Teams provides both a communication platform as well as a community to engage and talk to employees.
Human Resources – Strengthening the Workplace Community

Complete meeting solutions in Teams support screen sharing, recording, video and audio conferencing. Scheduling Assistant feature suggests times that are optimal for all attendees.
Microsoft Teams conversations are threaded so users can reply directly in-context to specific conversations, while keeping relevant discussions and files grouped together. The HR Head pins a survey form in a tab.
Integrated Forms application within Teams helps the HR team systematically gather employee feedback and suggestions.
Microsoft Teams enables transparent communications through channel conversations. The HR Head communicates in open-channel conversations and keeps team members up-to-date.
Build dynamic data visualizations, measure metrics, and track analytics through Power BI within Teams. The HR Head can dive into this wealth of analytical data shared using Power BI.
Quickly reach out to and chat with co-workers. Take conversations away from channels for 1:1 discussions, just like the conversation here between HR Head and the Vice President.
The HR Head uses channel communication to inform the team about the upcoming townhall. Open and transparent communication through Microsoft Teams boosts team morale.
After the town hall, there’s more good news for the employees. The happy news is disseminated using a channel and employees share their delight in the conversation thread.
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 channel conversations to relay updates to team members. The HR Head posts a quick update for team members regarding the way forward.
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.
Power BI is a powerful tool to create, share and analyze reports. A team member uses a Power BI tab to build a sentiment analysis report and share it later with her team.
New Employee Assistance

Server

Scenario Walkthrough

The Server is new to both Contoso and the hospitality industry. He is worried that he will forget the tasks required for his job. He knows that he can ask his co-workers if needed, but he would prefer not to bother them. The Server reaches out to the Restaurant Manager who helps him navigate through teams to a pinned tab with the standard operating procedures followed at Contoso. The Server quickly accesses shared documents and brings himself up-to-speed with the table numbering and protocol at Contoso.

- Clocks in and initiates a 1:1 chat conversation with the Restaurant Manager to organize his tasks.
- Navigates to the Word tab pinned by the Restaurant Manager.
- Views the checklist, reads through the tasks and re-familiarizes himself with them using integrated Word.
- Thanks the Restaurant Manager for his progress in understanding the procedures via tab conversations.
- Receives appreciation from the HR Manager within a private group chat for successfully completing all his tasks via Disco.
- Clocks out of his shift using the native Shifts app.

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

- Integrated Office applications like Word to execute tasks within Teams.
- Effective channel communication with @mention feature for quick updates.
- Celebrate your company culture and recognize people in real-time using Disco.

Which app integrations on Teams made it possible?

- Word
- Disco
- Shifts
With the Time Clock in Shifts, your team can clock in and out of a shift from anywhere, even from a mobile device. The Server begins his day by clocking in using Shifts right inside Teams.
Use a one-on-one chat or a group chat for conversations that don’t require the entire team. The new employee reaches out to the Restaurant Manager using 1:1 chat.
Tabs allow team members to access services and content in a dedicated space within a channel or in a chat. The Restaurant Manager directs the new joinee to the tab to explain his tasks.
Enjoy document collaboration, creation and editing with the full canvas and toolset of Word in Microsoft Teams. The new joinee can access shared documents hosted in the tab.
Recognize and appreciate employees and coworkers with Disco. Deliver in a chat, or for wider recognition, send it in a channel conversation. The new joinee gets confidence boost as he receives accolades from the HR Manager.
The Server uses Time Clock feature in Shifts to clock out.
Customer Service

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

Customer Service 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
- Protectively 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

Customer Service

Waiter

“I love helping people and I love what I do.”

- Providing excellent wait service to ensure satisfaction
- Taking customer orders and delivering food and beverages
- Making menu recommendations, answering questions and sharing additional information with restaurant patrons

Customer Service Manager

“Your most unhappy customers are your greatest source of learning.”

- Supervise customer service activities in various business units
- Train experienced and new reps and keep track of their progress
- Analyze solutions to conflicts involving customers and employees

Guest Manager

“I’m ready to learn everything I can to help guests and grow my career.”

- Answer guests’ queries
- Resolve issues by exploring alternative solutions
- Sell additional services by recognizing opportunities to up-sell accounts
- Maintain call center database by entering information
Generating Customer Satisfaction Index

Customer Service Manager

Scenario Walkthrough

Contoso wants to maintain high standards set for customer service, and in an endeavour to do so, the Customer Service Manager intends to assess how satisfied the business customers are. He decides to survey with the guests staying at the hotel to understand their feedback and expectations best. See how Microsoft Teams helped him achieve the task and collaborate with her team members smoothly.

• Creates a new channel within the team and adds team members relevant to the task.
• Uses Forms to conduct a survey to gauge customer satisfaction.
• Schedules a meeting on Teams to review and analyze the collected data.
• Shares the report with peers using Excel / PowerPoint.
• Pens down important points in OneNote for future reference.

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

• Native features like conference calling with screen share help ensure everyone is on the same page.
• Applications like Forms help team to conduct useful surveys.
• Dive into the pool of analytical data with Excel without leaving Teams.
• Integrated OneNote app helps quickly pen objectives.

Which app integrations on Teams made it possible?

- OneNote
- Excel
- Forms
Channels can be created to serve any purpose. They can be created to increase communication and productivity among team members and in this case, the Customer Service Manager aims to create a survey to gauge customer satisfaction.
Use a dedicated team to prepare and collaborate on a plan of action. The Customer Service Manager creates a dedicated team to take the plan ahead.
Integrated Forms application within Teams helps the Customer Service team systematically gather customer feedback and suggestions.
With Microsoft Teams, the Customer Service Manager can schedule meetings without difficulty and find the best available times for invitees through the native scheduling calendar. Meeting threads make follow-up conversations a breeze, and even fun!
When the Customer Service Manager creates a meeting invite, he can use the native scheduling calendar to check for optimal meeting time for all attendees.
Customer Service – Generating Customer Satisfaction Index

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.
The Customer Service Manager 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.
Close out conversations in channels once your project objectives have been achieved. The files shared during the discussions will stay safely hosted within the Files tab in the channel.
Quick and Hassle-free Room Service

Waiter

Scenario Walkthrough

Quick communication and quick resolution of issues is essential for satisfying customer experience at Contoso. The staff at Contoso Hotel needs to be connected to ensure prompt resolution of issues. The Waiter leverages powerful communication tools within Microsoft Teams to coordinate and communicate with other team members to ensure that guests have a hassle-free stay at Contoso.

- Receives a message from the Restaurant Manager regarding the updated list of guests that have requested to be served in their room via 1:1 chat.
- Views the list of rooms that need to be served using Tasks by Planner and To Do.
- Informs the inventory manager regarding items that the guest requested to be filled in the mini-bar using Priority Notifications.
- Shares an image of the mini-bar with the inventory manager using image sharing.
- Updates the status of each task assigned using Planner within Microsoft Teams.

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

- Enable image sharing to instantly provide situational context using Microsoft Teams.
- Send urgent messages to relevant team members using Priority Notification.
- Tasks by Planner and To Do in Teams eases lightweight task management.
Customer Service – Quick and Hassle-free Room Service

Quickly reach out to and chat with co-workers. Take conversations away from channels for 1:1 discussions. The Restaurant Manager updates the Waiter about the room services tasks.
Customer Service – Quick and Hassle-free Room Service

The deeply integrated Tasks by Planner and To Do within Microsoft Teams enables speedy plan mobilization using task assignment and delegation. The Waiter views tasks assigned to her by the Restaurant Manager.
Priority notifications for Teams grants users the ability to continually send notifications that repeat every two minutes for up to 20 minutes on all messages marked as urgent.
Take conversations offline from channels for 1:1 discussions. The Waiter reaches out to the Inventory Manager informing her the request for sugar-free beverages.
Assign, track and communicate tasks and milestones without having to switch apps using Tasks by Planner and To Do inside Teams. The Tasks by Planner and To Do app helps the Waiter track and close tasks related to the room service.
Personalizing Guest Experience

Guest Relations Manager

Scenario Walkthrough

Personalization of the guest experience is the next frontier in the hospitality industry. Contoso has decided to get hold of it to remain competitive and find the most success. See how the Guest Relations Manager collaborates with the team members over Microsoft Teams for seamlessly sharing all the related information.

• Posts a message to highlight the purpose accommodated with a meeting invite for further discussion.
• Notes down key giveaways discussed over the call into a OneNote.
• Shares a PDF report containing innovative trends related to personalized stay prevailing in the hospitality industry.
• Informs all the team members to attend the presentation event and shares the PowerPoint for reference.

How did Microsoft Teams help the Guest Relations Manager execute her roles and responsibilities?

• Hold meetings and track discussions on a steady forum.
• Disseminate meeting notes with OneNote for team members’ reference.
• Use applications like PDF for quick access to reports, documents and contracts.
• Build collaborative presentations in SharePoint using PowerPoint.

Which app integrations on Teams made it possible?

Excel OneNote PDF
Use a dedicated team to prepare and collaborate on a plan of action. The Guest Relations Manager creates an exclusive team for personalizing guest experience.
With Microsoft Teams, the Guest Relations Manager can schedule meetings without difficulty and find the best available times for invitees through the native scheduling calendar. Meeting threads make follow-up conversations a breeze, and even fun!
The conversations progress to the exclusive Marketing channel where team members focus on tasks specific to their team. Channels provide the much-needed structure to ensure areas of the project keep moving in parallel.
Channel conversations keep team members in sync with each other. They enable contextual, structured, data-driven discussions and decision making such as the cost implications in this case.
The Marketing Manager uses Excel in Teams to create a budget breakdown and uploads it to the Files tab in the channel for peer review. The spreadsheet can be pinned as a tab for quick access, while any edits to the file can be carried out with ease.
The Guest Relations Manager uses channel communication to inform her team that the project is a huge success. Intense in moments of work flurry, these channels also see a fair amount of levity with GIFs and emojis that makes working together fun!
The Guest Relations Manager uses channel communication to inform her team that the project is a huge success. Intense in moments of work flurry, these channels also see a fair amount of levity with GIFs and emojis that makes working together fun!
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.
Teams and channels are where you hold meetings, have conversations and work on files together with team members. The Assistant Store Manager seeks suggestions to create better customer experience from the team.
Information Technology

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

Information Technology 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
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Apps that enable an immersive experience in Teams

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- Teamwork
- Adobe Sign
- Tasks by Planner and To Do
- Communities
Meet the Business Decision Makers

Information Technology

IT Manager

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

- Administer IT and computer systems for a smooth operation
- Complete system installs and upgrades
- Manage network security
- Oversee data storage and retrieval systems

IT Associate

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

- Design and document platforms/systems to meet organizational requirements
- Install, customize, maintain, test and troubleshoot operating systems, software and hardware systems
- Provide technical support as needed

Systems Engineer

“The advance of technology is based on making it fit in so that you don’t even notice it, so it’s part of everyday life.”

- Monitor existing systems to ensure structural integrity
- Oversee the development and installation of new hardware and software
- Install and configure operating systems and other software and routinely test installed software for glitch detection and other issues
Meet the Business Decision Makers

Information Technology

Developer

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

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

Operations Manager

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

- Ensure operational costs are minimum
- Conduct operational audits and ensure process compliance
- Prepare operational reports for the management
- Plan inventory, purchase material and monitor work efficiency
Scenario Walkthrough

At Contoso, the need of the hour is to stay connected 24/7. Operations at the Seattle location, however, have run into a roadblock as the server has developed a glitch. The Front Desk is swarmed with customers walking in with prior reservations and new arrivals. See how the Operations Manager collaborates over Teams to resolve the situation.

- Operations Manager receives notification from the Front Office Executive informing network outage.
- Coordinates with the Network Support Engineer to find out SPOC at the Roxhill location.
- Gets on to 1:1 chat to arrange a new server.
- Reviews the list of troubleshooting steps.
- Updates the team on the progress to resolve the issue.

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

- Priority Notification to seek immediate attention of relevant team members.
- Use 1:1 chat for quick and efficient communication.
- Share locations with ease using Places without leaving the Teams.
- Use Teamwork to assimilate and share co-authored notes.
Priority notifications notify users every 2 minutes for a period of 20 minutes or until messages that are marked as urgent are picked up and read by the recipient, maximizing the likelihood that the message is acted upon in a timely manner. The Operations Manager responds to a priority notification.
Use channel conversations to relay updates to team members and begin a process flow for task completion. The Operations Manager alerts the support team about the system outage.
The Front Desk Executive uses Excel to build and present data to the team. Create impactful summaries of crucial data with Excel, Word and OneNote for Microsoft Teams.
Location sharing becomes easy within Microsoft Teams with Places. The team members working on the repairs use Places to tag the location to pick up back-up server from.
Hold calls and conferences and share screens seamlessly in Microsoft teams. Meeting attendees can view a list of participants, meeting details and more before joining a meeting.
Use channel conversations to relay updates to team members. The IT Manager posts a quick update for team members regarding new devices that they are expecting.
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!
Use Teamwork to stay up-to-date with your projects, without having to leave Teams. Quickly create and share a plan of action among team members with Teamwork.
Nothing boosts team confidence more than sending some praise. The Operations Manager appreciates the team effort in the channel by using Praise app.
Resolving Issues with the Company Website

IT Manager

Scenario Walkthrough

A well-functioning bug-free website is an essential part of staying connected with the customer. Contoso’s IT Operations manager is notified of a steep decline in the number of hits on the website home page. She quickly investigates the issue and co-ordinates with the Engineering team to resolve the bug and make sure that the website is accessible and fully functional.

- Receives notification from the Marketing Manager about a steep decline in the number of hits on the website homepage.
- Cross-checks the reported decline in the number of website hits using a Power BI dashboard and a website tab.
- Notifies the web developer of the issue and appreciates him for the quick resolution.
- Updates the Marketing Manager about the website being live again.

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

- Effective channel communication with @mention to catch each other’s attention instantly.
- Facilitation of data-driven decisions informed by visualizations and scoring in Power BI for Microsoft Teams.
- Pin a website, so everyone has easy access to important sites within Microsoft Teams.

Which app integrations on Teams made it possible?

Website  Power BI
Collaborate with your team through channel communications using @mention to tag required personnel and keep conversations around the topic in a single thread. The Marketing Manager reaches out the IT support team to point out website issues.
Build dynamic data visualizations, measure metrics, and track analytics through Power BI within Teams. The IT Manager can dive into this wealth of analytical data shared using Power BI.
Tabs in Microsoft Teams allow you to display rich and interactive web content to your team. The website is pinned in a tab for easy access for the team. The Marketing Manager points it’s no longer functioning.
Channel conversations can contain a lot things – conversations, files shared by team members, meeting threads, and GIFs! Use social features like reacting to team members’ conversations and responses to acknowledge them.
Scenario Walkthrough

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

• Receives alert in channel where an employee has raised an issue about a printer issue.
• Sends a 1:1 chat message to the employee to understand the situation better.
• Gets on a Teams call with the Front Desk Executive to troubleshoot the issue.
• Requests permission to access the executive’s desktop over Teams.
• Troubleshots the issue and installs updates to solve the issue.
• Closes the Service Desk Plus Cloud ticket in the channel.

How did Microsoft teams help the IT Associate execute his roles and responsibilities?

• Use Service Desk Plus Cloud to log tickets and initiate conversation.
• Personal 1:1 and channel conversations to gain clarity on the issue.
• Enable meeting calls with screen share right inside Teams.

Which app integrations on Teams made it possible?

ServiceDesk Plus Cloud
The IT Manager delegates tasks to team members through channel communication. The @mention feature ensures that team members don’t miss out on messages that need their attention!
Use a one-on-one chat or a group chat for conversations that don't require the entire team. The Product Line Owner quickly reaches out to the Analyst using 1:1 chat.
1:1 chat conversations can turn into a call, according to the participants’ convenience. The engineer and the employee opt for a call to troubleshoot the issue.
Use Service Desk Plus to accomplish a host of IT service desk management tasks, such as assigning, picking up, editing, deleting, and linking tickets—all from within Microsoft Teams.
Firmware Updates
Systems Engineer

Scenario Walkthrough

The Contoso IT team is gearing up for a big firmware update for their Hotel Management Information Systems software. Microsoft Teams offers all the tools and features the team needs to communicate and collaborate efficiently.

• Posts an announcement marked important to do a status check on the firmware update.
• Receives a reply from a team member that a release doc needs to be prepared.
• Joins a team meeting to sketch out the details of the doc.
• Works with the team member to create a final version.

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

• Word application enables creating and reviewing various documents and reports right within Microsoft Teams.
• Native features like conference calling with screen share help ensure everyone is on the same page.
• Effective channel communication with @mention feature for quick updates.

Which app integrations on Teams made it possible?

Word
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.
Easily schedule meetings and find the best available times for invitees through the native scheduling calendar. The IT team meets on Teams which persists any conversations and decision taken during the meeting for easy future reference.
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.
@mention a person, channel or team to make sure your message reaches the relevant personnel. The firmware release notes are shared in the channel and relevant personnel are roped into the conversation using the @mention feature.
Scenario Walkthrough

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

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

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

- Create an inventory list quickly using Excel right inside the Teams.
- Track the replacement process with a shared spreadsheet in channels.
- Make use of channel conversations to share updates in real-time with relevant members.
- Integrate Asana in Teams to help you create, assign and discuss tasks with ease.

Which app integrations on Teams made it possible?

Excel
Asana
Use channel conversations to relay updates to team members. The IT Manager posts a quick update for team members regarding new devices that they are expecting.
Use Excel in Teams to compile data and maintain checklists. Excel in Microsoft Teams helps the IT team maintain a unified inventory list, complete with employees who need them.
Quickly reach out to and chat with co-workers. Take conversations offline from channels so that you can keep 1:1 discussions private or bring decisions or points of value back to the channel, where needed.
Turn conversations into action items with Asana in Teams to keep work on track. Collaborate on Asana tasks and keep work connected, without having to leave Teams.
Bug Management

Developer

Scenario Walkthrough

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

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

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

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

Which app integrations on Teams made it possible?

GitHub
Jira Cloud
Configure GitHub in Microsoft Teams to receive notifications for Pull Requests, Pushes, Issues, Commit comments etc. Jira Cloud bot enables team members to easily find issues, assign them to team members, make edits, log time against an issue, watch/unwatch and vote/unvote on the issue.
As the Developer gets notified about a new Pull Request, she fixes the errors and alerts the Tech Lead @mentioning him in the channel.
Jira Cloud for Microsoft Teams makes collaboration and communication over the backlog easy and smooth. The Tech Lead views issues and the progress in the Jira Cloud tab.
Channel conversations keep team members in sync with each other. They enable contextual, structured, data-driven discussions and decision making such as the cost implications in this case.
Ready to host?

aka.ms/goTeams