Microsoft Teams for Media, Entertainment & Telecommunication

Microsoft Teams
In this playbook...

Find out how Microsoft Teams can enable personas across every major function and role in your organization to effectively navigate through daily high value scenarios with ease and confidence.

**Operations**
- Creating a New Video Game
- Game Modeling and Asset Creation
- Introducing New Characters in a Video Game
- Sharing the Travel Itinerary and Work Schedule
- Seamless Content Creation and Distribution
- Track Viewership Metrics and Engagement

**Operations (Contd.)**
- Sourcing and Publishing a Story
- Managing Live Coverage Breaking Schedule
- Planning a College Sports Event at an Arena
- Crowd Management

**Marketing**
- Sending a Film to Festival Circuit
- Monitoring Negative Responses
- Setting Up an Experience Kiosk
- New Web Series
- Movie Promotion at Theme Park
- Network Capacity and Demand Planning
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.

Sales
- Forecasting Sales and Conducting Gap Analysis
- Building a Sales Summary
- Preparing for a Monthly Review
- Identifying and Closing a Major Sales Opportunity

Finance
- Raising Finances for an Upcoming Film
- Planning and Coordinating the Coverage of a Sporting Event
- Creating a Budget for a Game Launch Event
- Finalizing the Location and Cast for the Film

Headquarters
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- Strategizing Solutions for Customer Retention
- Partnering with a Video Streaming Service
- Planning Routine Safety Drills
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Legal and Compliance

• Finalizing Distribution Partners
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Human Resources

- Talent Acquisition
- New Employee Training
- Review of Hiring Process by HR Leadership
- New Health Benefits for Employees and Onsite Workers
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

Creative Director

“Good design is like a refrigerator—when it works, no one notices, but when it doesn’t, it sure stinks.”

- Manage and supervise all the creative aspects of a video game
- Collaborate with key members in various teams to communicate and solve problems efficiently
- Review all the work submitted by artists and send revision notes

3D Modeling Artist

“Creativity is nothing, but a mind set free.”

- Create 3D Models and Wireframes for video games
- Consult the Art Director to revive clarity on tasks and work more effectively
- Collaborate with the creative team to come up with the best solution for any given problem

Operations Manager

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

- Follow important policies, prepare plans, and take strategic decisions
- Help promote a company culture that encourages top performance and high morale
- Oversee budgeting, reporting, planning, and auditing
Meet the Business Decision Makers

Operations

Sports Editor

“A good editor is someone who cares a little less about the author’s needs than the readers.”

- Monitor the news daily to stay up to date of sporting events and issues that need to be covered
- Collaborate with reporters to generate story ideas
- Write headlines and summaries for sports stories

Producer

“I’d rather have it right than right now.”

- Coordinate the activities of writers, directors, managers, actors, and other personnel throughout the production process
- Raise money and setting the budget and size of a production
- Perform activities of overseeing budgeting, scheduling, planning, and marketing

News Coordinator

“The future does not fit in the containers of the past.”

- Coordinate the direction of a publication with the senior management
- Decide which articles will be included in the publication and decide how they will be laid out
- Consider submissions for inclusion from freelance journalists, photographers, and illustrators
Meet the Business Decision Makers

Operations

Media Coordinator

“What makes you weird, makes you unique and therefore makes you stand out.”

- Identify press opportunities through evolving issues
- Develop content for broadcast, print and online distribution channels
- Create and manage the organization’s social media profile and presence

Amusement Park Manager

“I call myself the Amusement Park. That's because I'm funny and scary at the same time.”

- Take charge of the overall operations of an amusement park, including duties ranging from hiring new employees to supervising the park's security staff
- Oversee all aspects of what makes the park run and consider what can be done to improve operations
Creating a New Video Game
Creative Director

Scenario Walkthrough

Contoso Games has decided to work on a new video game. The core team has brainstormed on various stages in the game which they’ll discuss with the programmers & sketch out workable ideas. Following the feedback from the programmers, the team must flesh out with the writers and concept artists on how the game will evolve. See how the Creative Director uses Microsoft Teams to collaborate with her associates.

- Conducts channel meetings with the core team.
- Reviews the Evernote document created by her core team.
- Collaborates with the game programmers to shortlist ideas.
- Reviews artwork created by the artists.
- Conducts meetings with the screenwriters to create the game’s core narrative.

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

- Bing News helps find relevant articles regarding the new game.
- YouTube to watch videos relevant to the new game.
- Note-taking in a shared Evernote tab allows team members to have shared access to the information.
- Freehand by InVision offers collaborative creation with the team.
- PowerPoint to create a presentation containing the new game’s ideas and artwork.
Open channel conversations among team members helps the Creative Director to ask for suggestions from the team. Team members employ Bing News cards and YouTube to display latest trends in market.
The Creative Director schedules a channel meeting to ideate and brainstorm with the team members. OneNote helps the team members to jot down lists instantly.
Microsoft Teams sends notifications to all participants five minutes before the meeting is scheduled to end. This helps everyone stay cognizant of the time left in the meeting.
Complete meeting solutions in Teams support screen sharing, recording, video and audio conferencing. Scheduling Assistant feature suggests times that are optimal for all attendees.
Operations – Creating a New Video Game

Enjoy collaborative and powerful document creation with Evernote in Microsoft Teams. A team member uses Evernote to gather new game ideas.
Use the meeting thread for follow-up conversation about meeting outcomes. The creative team discusses new character art over the meeting and continues the discussion in the thread.
Collaborate, ideate and draft solutions on an infinite whiteboarding space with Freehand by InVision in Teams. The team members use the Freehand by InVision app to visualize an upcoming character in the game.
Operations – Creating a New Video Game

Store and share important files within a dedicated, cloud-enabled repository with Files. Design documents such as the PowerPoint containing sketches for finalized characters are housed here for the team’s easy access.
Tabs in Microsoft Teams allow you to display rich and interactive web content to your team. The Crisis Coordinator posts a visual summary of the results in the pinned tab.
Evernote enables collaborative and powerful document creation within Microsoft Teams. A team member shares the new game flow using Evernote.
Game Modeling and Asset Creation
3D Modeling Artist

Scenario Walkthrough

As the pre-production stage is completed, the production at Contoso Games has begun in full swing. The Art Director is overseeing all the artistic processes while focusing on the 3D modeling of the game. See how the 3D modeling Artist uses Microsoft Teams to collaborate with his creative team to create all the 3D models required for the game.

• Consults the Art Director to get more clarity on his tasks.
• Shares the New Game’s 3D modeling feedback with the creative team.
• Collaborates with the creative team and supervises on behalf of the Art Director.
• Creates a presentation with the final renders requested by the core team.

How did Teams help the 3D Modeling Artist to execute his roles and responsibilities?

• Collaborate more, manage tasks efficiently with Trello.
• Interactive meetings with artists using Lucidspark for drawings & sketches.
• Review artwork in a PowerPoint presentation.
• Share designs, get feedback and stay up-to-date on actions taken with Adobe Creative Cloud.

Which app integrations on Teams made it possible?

PowerPoint
Trello
Adobe Creative Cloud
Lucidspark
Use channel conversations to relay updates to team members and begin a process flow for task completion. The Art Director schedules meeting to discuss graphics creation.
Speedy plan mobilization using task assignment and delegation is done best using Trello. Trello in Teams allows the team to track tasks, see assignments, status and manage workflows without leaving 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.
Create and share PowerPoint presentations over a Teams call to make conversations meaningful and to offer attendees a visual representation of key points covered.
Create clarity as you collaborate on graphics directly in Microsoft Teams with Lucidspark. The team members visualize changes in the 3D assets using Lucidspark.
The 3D Modeling Artist shares final renders of the 3D assets within the channel conversation. The presentation can be pinned as a tab to the channel for employees’ easy access whenever required.
Introducing New Characters in a Video Game

Creative Director

Scenario Walkthrough

Contoso Games is planning to add six new characters to their popular video game 'The Fighters'. The Creative team believes this will help the game stay at the top of the popularity charts. The Creative Director uses Microsoft Teams to brainstorm with her associates and plan the sequence in which the downloadable content will be released to the public.

• Schedules a team meeting to discuss new characters for the game.
• Shortlists characters following feedback from team members.
• Brainstorms with the Art Director and Concept Artists on character concepts.
• Seeks inputs from the Marketing team about the character release graph, trailer ideas, storylines and more.

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

• Conduct group chats to communicate and coordinate with key members.
• Uses Polly to assess the popular choice.
• Collaborate, edit and draft base character designs in real-time using Freehand by InVision.
• PowerPoint helps in drafting an effective presentation for various teams.

Which app integrations on Teams made it possible?

PowerPoint  Polly  Freehand by InVision
The Creative Director posts an announcement in the channel to add more characters in the game and schedules a meeting to discuss it further. A meeting is set up in the channel to flesh out more ideas.
With Microsoft Teams, you can easily schedule meetings and find the best available times for invitees through the native scheduling calendar. The Creative Director checks for an optimal meeting time for all attendees.
Create, ideate and draft rich solutions on a digital whiteboard with Freehand by InVision in Teams. The team members use the Freehand by InVision app to visualize character concepts in the game.
Integrated Polly application within Teams helps systematically gather employee suggestions. After the plans to add more characters to the game are solidified, the Creative Director creates a survey to select the best characters.
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!
With Microsoft Teams, the Creative Director 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!
Store and share important files within a dedicated, cloud-enabled repository with Files. Design documents such as the PowerPoint containing final designs are housed here for the team’s easy access.
The Creative Director delegates tasks to team members through channel communication. Meet Now feature in Teams helps trigger a meeting instantly to discuss the marketing strategies.
Sharing the Travel Itinerary and Work Schedule

Operations Manager

Scenario Walkthrough

The Operations Manager supervises travel and stay arrangements for the team covering the Olympics. She plans, creates and shares a schedule to carry out the coverage of the event to ensure that all team members are on the same page. The Operations Manager then leverages efficient file sharing features within Microsoft teams to share the travel itinerary and important documents with members covering the Olympics.

• Creates a channel message and shares the team’s schedule for the entire duration of the Olympics using Shifts.
• Shares the location and details of the hotel that the team will be staying at using Places.
• Finalizes the hotel and shares the travel itinerary with team members in a tab using PDF.
• Reaches out to the team members using a channel conversation and shares individual travel tickets and password-protected documents using the Files tab.

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

• Look up for detailed information about different hotels, restaurants, and venues all within Microsoft Teams with Places.
• Make use of channel conversations to share updates in real-time with relevant members.
• Create, update and manage schedules for your team with Microsoft Teams using Shifts.
• Organize files into folders for easy access using the Files tab.

Which app integrations on Teams made it possible?

Shifts  PDF  Places
@mention a person, channel or team to make sure your message reaches the relevant personnel. The Operations Manager shares the team’s schedule for the entire duration of the Olympics using Shifts.
The Operations Manager stays connected, in sync with others and manage their staffing schedules using the Shifts app on Microsoft Teams.
Once the Operations Manager finalizes the travel itineraries and accommodation for the team, he posts an announcement in the channel sharing a PDF and tagging the location using Places in Microsoft Teams.
The Operations Manager shares a PDF in Teams to display travel itinerary for the team and uploads it to the Files tab in the channel. The PDF can be pinned as a tab for quick access.
The Files tab in each channel is a cloud-enabled repository, where team members can store, access and share important files without leaving the Teams platform.
Seamless Content Creation and Distribution

Sports Editor

Scenario Walkthrough

The Sports Editor is working on an article marking the 200th match of a great baseball player. He seamlessly searches through the company's archives of articles around the player, writes the story, gets it reviewed, and coordinates with the design team all within Microsoft Teams. He leverages powerful editorial and collaborative tools within Teams to ensure that he churns out a great article on time.

• Responds to the Editor-in-Chief and accepts an assignment to write an article celebrating the career of a great player via 1:1 chat.
• Searches through the archives for previously written articles around the Player using the search bar within Microsoft Teams.
• Creates a message and shares a draft of his article using channel communications.
• Views and resolves comments left by the Editor-in-Chief in a document with shared access using Word.
• Creates a private group chat and approves creatives shared by the Designer using Adobe Creative Cloud for Microsoft Teams.
• Responds to the Editor-in-Chief who approves the final article and shares the way forward through a channel post.

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

• Search for files and documents shared with a chat or channel with easy using the search bar.
• Create, edit and collaborate on documents with team members with Word.
• Find, view, and share Adobe Creative Cloud assets within Microsoft Teams using Creative Cloud for Microsoft Teams.
• Private group chat for seamless flow of information with multiple team members.

Which app integrations on Teams made it possible?

Adobe Creative Cloud

Word
Take conversations offline from channels for 1:1 discussions. The Sports Editor responds to Editor-in-Chief and accepts an assignment to write an article celebrating the career of a great player via 1:1 chat.
The Sports Editor digs through the archives for previously written articles about the player using the search bar within Microsoft Teams.
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.
Enjoy powerful document creation and editing with Word. Store and access team documents easily within the Files tab of the channel. The Sports Editor shares the first draft of his article using Word in Teams.
Use a one-on-one chat or a group chat for conversations that don’t require the entire team. The Sports Editor creates a private group chat to discuss sketches created by the Designers.
The creatives to go along with the article are shared in the channel and relevant personnel are roped into the conversation using the @mention feature. The Sports Editor receives a notification when he gets mentioned in a conversation.
Track Viewership Metrics and Engagement

Producer

Scenario Walkthrough

At Contoso, the Producer who’s in charge of a daytime talk show understands the need to make data-driven decisions to plan future productions. She schedules a meeting with the team to analyze the viewership metrics across multiple media outlets and brainstorm for ideas. Microsoft Teams empowers the Producer to seamlessly analyze data, communicate with team members and create an actionable plan.

- Creates a channel message and @mentions the Analyst asking her to share viewership metrics and social media reactions for the latest episode.
- Receives a notification and responds to a channel message from the Analyst within a message thread.
- Views social media analytics and viewership metrics shared by the Analyst within a Power BI tab.
- Schedules a channel meeting to discuss the data and brainstorm for ideas.
- Views the Minutes of the Meeting shared in a Teamwork tab within a channel.

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

- Turn complex data into powerful, visual graphics to make informed and data-driven decisions using Power BI within a channel.
- Search for notes, tasks, spaces or people and share details with your team using Teamwork.
- Effective channel communication with @mention feature for quick updates.
- Complex set of hurdles overcome without communication gaps with channel meetings and conversations.

Which app integrations on Teams made it possible?

- Teamwork
- Power BI
@mention a person, channel or team to make sure your message reaches the relevant personnel. The Producer assigns tasks in the channel and relevant personnel are roped into the conversation using the @mention feature.
Facilitate data-driven decisions informed by visualizations and scoring in Power BI for Microsoft Teams. The Analyst presents viewership and social media metrics data to the Producer using a Power BI dashboard.
A Power BI dashboard offers a visually rich view of current and projected data. The Producer uses Power BI to understand viewership metrics and social media sentiment analysis.
The Producer schedules a channel meeting to discuss the reports. Use the meeting thread for follow-up conversation about meeting outcomes.
Easily schedule meetings and find the best available times for invitees through the native scheduling calendar. The Producer uses this feature to set up channel meeting.
During a meeting, the participants can use rich meeting capabilities to make the meeting engaging and productive. Needless to say, meetings are fully supported on mobile clients too!
Teamwork lets you add content from within the app or in collaborative spaces as tab Pages in Microsoft Teams. Quickly disseminate meeting outcome, notes and action items among team members with Teamwork.
Sourcing and Publishing a Story

News Coordinator

Scenario Walkthrough

Being one of the most sought-after news houses in the country, Contoso must push latest updates to a breaking story almost as soon as it happens. The News Coordinator sees a multiple vehicle collision story breaking on Twitter. She scrambles the reporting, video and desk crew for pushing latest updates to their news website using Microsoft Teams.

• Assembles the team for a daily stand-up and discusses plans for the day ahead.
• Configures a website to showcase a story being picked up by social media trends.
• @mentions the relevant team members to get their attention on a pressing situation.
• Collaborates with them to get articles, videos, pictures, etc. up and running on the website.
• Keeps track of the assigned tasks and reviews their progress.

How did Microsoft Teams help the News Coordinator to execute her roles and responsibilities?

• Bing News helps keep the team in the loop and engage them with relevant and latest industry practices and trends.
• Integration of Website facilitates periodic updates from Twitter to a dedicated channel.
• Shifts enables team members to stay connected and manage their staffing schedules.
• Wrike helps the News Coordinator to assign tasks and review them subsequently.
• OneNote allows shared access to important notes and documents for team members.

Which app integrations on Teams made it possible?

Website, SharePoint, Power Automate, OneNote, Bing News, Places, Wrike, Shifts
Stay up-to-date on current events courtesy of Bing News. Find coverage of local, national and worldwide news, then share it in a channel. The News Coordinator updates the team about a trending story using Bing News tab.
Plan meetings or keep them impromptu, according to team members’ availability, which reflects in the native scheduling calendar. Hold seamless calls and conferences and share screens with enhanced security.
The News Coordinator alerts the team about an accident sharing Twitter trends and then 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!
The News Coordinator integrates a tab to bring in tweets with specific hashtags using Microsoft Flow. Create a custom Flow to scan social media for information and auto-save the tweets to a SharePoint List.
Whether you’re putting together a schedule for your team or swapping shifts with a teammate, Shifts got you covered. The News Coordinator creates schedule for reporters using Shifts.
Operations – Sourcing and Publishing a Story

Once the Reporter gets to know the accident location, he posts an update in the channel tagging the location using Places in Microsoft Teams.
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.
Add any Wrike project as a tab and create task lists, add details. You can even edit images in the Wrike project without leaving 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.
Collaborative and powerful document creation with OneNote in Microsoft Teams. Eyewitness quotes are collated in a OneNote tab.
Collaborate more efficiently while working on Wrike. It allows you to add more tasks and update the status of your projects and even upload your work without leaving Teams.
As a new story starts breaking, the News Coordinator updates the team using Bing News and the team moves on to the new task.
Managing Live Coverage Breaking Schedule

Media Coordinator

Scenario Walkthrough

The Media Coordinator at Contoso understands the risk of live games extending beyond the estimated end time. When she discovers that the start of the match has delayed by 15 minutes, she immediately schedules a call with the producer of the post-match analysis show. She works out a plan to shorten or delete segments to ensure that none of the other shows airing on the channel are affected. The Media Coordinator leverages communication tools within Microsoft Teams to carry out her tasks and maintain producer confidence.

- Posts a channel message and @mentions relevant personnel updating them of the match delay using channel communications.
- Discusses changes to the post-match analysis show to ensure that it ends on time via a channel meeting.
- Coordinates with the Producer to view and edit the schedule of the post-match show using an Excel tab.
- Reaches out to the Producer of the show scheduled after the post-match analysis to reassure her that the schedule will remain the same via a 1:1 chat.
- Receives appreciation from the Producer for his timely reassurance via Praise.

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

- @mention to quickly catch the attention of relevant team members.
- Open channel meetings to ensure that everyone is on the same page.
- 1:1 chat to reach out to team members to quickly communicate and share files.
- Pin important documents as a tab within a channel for easy access.

Which app integrations on Teams made it possible?

Excel
Praise
The Media Coordinator gets in touch with the team to update them about the delay in the match. She engages the team with a quick meeting using the Meet Now feature in Teams.
The News Coordinator updates the post-match show schedule after she discusses it with the team. Excel spreadsheet can be pinned as a tab for quick access, while any edits to the file can be carried out with ease.
Send acclaim to your employees and coworkers with Praise. Deliver in a chat, or for wider recognition, send it in a channel conversation.
Planning a College Sports Event at an Arena
Operations Manager

Scenario Walkthrough

Contoso will be hosting the annual basketball tournament for Northwind University this year. The University is looking for a full-fledged setup which will also include live broadcast of the event through a local satellite broadcast provider. See how the Operations Manager at the arena uses Microsoft Teams for sharing vital information and executing related activities.

• Hosts a meeting for sharing of related information and documents in a dedicated channel.
• Coordinates with the team members for arrangements related to media, parking, emergency, and more.
• Shares the tournament details with all the concerned authorities at the arena.
• Acknowledges the camera positioning details from the Media & Sponsorship Manager.
• Discusses on the food menu with the Executive Chef for confirmation and acknowledgement of the same.
• Shares an event insurance form with the Sports Manager at the University in a 1:1 chat.
• Shares a competition day checklist to be followed during the event and discusses over staff and volunteers’ requirements.

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

• Evernote makes it easy to capture, organize and share notes in Teams.
• Forms helps in engaging employees and gather immediate response for surveys and feedback.
• Adobe Sign helps in sharing of contracts without leaving the Teams interface.
• Word allows document collaboration through established channels.

Which app integrations on Teams made it possible?

- Evernote
- Word
- Adobe Sign
- Forms
- PDF
- Lists
Quickly call and chat with team members present in a channel. The Operations Manager reaches out to the team through chat for a quick update on a tournament and schedules a meeting to discuss more.
With Microsoft Teams, you can easily schedule meetings and find the best available times for invitees through the native scheduling calendar.
Deeply integrated Adobe services make it easier to view PDF files in Microsoft Teams without leaving the application. Parking facilities are shared using Adobe PDF file format.
With Microsoft Teams, team members can have quick access to reports, documents and notes. Files can be pinned in the channel for 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 for future reference.
The team members use the integrated Evernote app within Microsoft Teams to create food menu for the tournament, without having to leave the application. The Evernote tab serves as a team notebook to the entire group.
Quickly reach out to and chat with co-workers. Take conversations offline from channels for 1:1 discussions. The Operations Manager shares an agreement through Abode Sign with the Sports Manager.
Send a document for e-signature and track the signing process at every step—right from the Adobe Sign tab within Teams.
Microsoft Teams conversations are threaded so users can reply directly in-context to specific conversations, while keeping relevant discussions and files grouped together.
Create a new list from scratch, from templates, based on an existing list, or by importing data from Excel. Record data, have conversations about list items, organize process, and track status in an environment built for teamwork and collaboration with Lists.
Integrated Forms application within Teams helps systematically gather employee feedback and suggestions. The Operations Manager creates a checklist of requirements using feedback from volunteers and staff.
Crowd Management
Amusement Park Manager

Scenario Walkthrough

The Amusement Park Manager at Contoso Theme Park understands that it is important to keep the waiting time at each attraction comfortable enough to ensure that customers have an enjoyable experience. He views a live dashboard that shows the number of visitors at each attraction and notices overcrowding at two major attractions. He leverages applications and tools within Microsoft Teams to quickly coordinate with members of the performance and creative teams to work out an impromptu clown show and divert visitor flow between attractions.

- Views and analyzes real-time visitor traffic and wait times across attractions within the theme park using Power BI.
- Creates a new task and assigns a performer to perform an impromptu clown show between the two attractions using Workstreams.ai.
- Updates the team regarding resolution of the overcrowding issue and positive visitor response to the performance via channel conversations.
- Appreciates the performance of the clown using Praise.

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

- Visualize real-time metrics regarding visitor flow and wait times using Power BI.
- Leverage result-oriented task management in Teams with Workstreams.ai.
- Publicly appreciate high performing team members using Praise.
- @mention feature to quickly catch the attention of relevant team members.

Which app integrations on Teams made it possible?

Workstreams.ai  Praise  Power BI
Operations – Crowd Management

Have focussed conversations around a topic using a tab. The Amusement Parks Manager wants to tackle crowds immediately and hence marks his message to the channel as important.
Build dynamic data visualizations, measure metrics, and track analytics through Power BI within Teams. Amusement Park Manager can dive into this wealth of data shared using Power BI.
Create tasks, add labels, assign teammates and manage your work in flexible Kanban boards. The Workstreams.ai tab helps the Amusement Park Manager break down tasks efficiently and assign stakeholders for each task, without having to leave the Teams app.
Praise lets you choose between multiple badges allowing you to customize your appreciation based on the occasion. The Amusement Park 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.
Operations – Crowd Management

As the situation is brought under control, the Amusement Park Manager sends across a Praise for the team members for coming up with a solution quickly.
Marketing

Check out how the operations 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 Associate

“My view on marketing is, it is the art of identifying a market and choosing what to do with it.”

• Manage daily administrative tasks to ensure the Marketing department runs smoothly
• Conduct market research to identify new revenue opportunities
• Gather and analyze consumer behavior data

Team Lead

“A good leader finds satisfaction in helping other be productive, not being the most productive person in the room.”

• Identify issues and offer solutions
• Manage teams and delegate tasks, as well as monitor progress and stay on schedule
• Communicate with different departments

Marketing Analyst

“Marketing without data is like driving with your eyes closed.”

• Gather data about consumers, competitors and market conditions
• Analyze data using statistical software
• Prepare reports and present results to clients as well as to the management
Meet the Business Decision Makers
Marketing

**Business Development Manager**

"A satisfied customer is the best business strategy of all."

- Contact potential clients to establish rapport and arrange meetings
- Plan and oversee new marketing initiatives
- Research about organizations and individuals to find new opportunities

**Marketing Manager**

"Marketing is not the art of finding clever ways to dispose of what you make. It is the art of creating genuine customer value."

- Track and analyze the performance of advertising campaigns
- Manage the marketing budget and ensuring that all marketing material is in line with the brand identity
- Develop strategies to maximize profits and increase market share
Sending a Film to Festival Circuit

Marketing Manager

Scenario Walkthrough

Contoso is planning to submit its film to various festivals for promotion. The Marketing Manager, together with his team, plans the entire process for submission and marketing of the film. See how Microsoft Teams and its varied list of apps help the Marketing Manager execute his plan.

- Schedules a meeting to discuss options for submitting the film to festival circuit and engages the participants in productive discussions using meeting breakout rooms.
- Configures the monday.com app to a meeting to create, assign, track and discuss tasks during the scheduled call.
- @mentions Finance Manager to seek budget approvals for the promotion expenditure.
- Reviews the Excel sheet created by his associate listing popular film festivals where the film will be well-received.
- Brainstorms with the team and shares ideas for the Electronic Press Kit using Miro.
- Shares a Word document for interview questions for the lead cast.

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

- Office applications like Excel and Word allow quick access to shared information.
- Leverage a collaborative whiteboard to brainstorm ideas and discuss workflows with Miro.
- monday.com in meetings help you assign, track, and communicate tasks and milestones during calls.

Which app integrations on Teams made it possible?

- Excel
- Word
- OneNote
- Monday.com
- Miro
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.
Marketing – Sending a Film to Festival Circuit

Use tabs to configure relevant apps for your meeting. The Marketing Manager configures monday.com in a meeting to create, assign, track and discuss tasks during the meeting.
Meeting attendees can access configured applications and leverage a wide range of features like live captions, background effects, meeting recordings, and more for an engaging and productive meeting experience.
Organizers can choose to assign participants to breakout rooms manually or automatically to engage participants in discussions during a meeting.
Breakout rooms allow meeting organizers to divide the meeting into sub-groups to facilitate discussions and brainstorming sessions. This allows for greater flexibility during meetings and participants can clarify questions without disturbing the breakout rooms sessions.
Monday.com in meetings enables the participants to discuss and create tasks, track progress, and more without leaving the meeting interface. This makes it easy for meeting participants to maintain context during discussions.
Share important information, updates, files, tasks and more within a meeting chat for a collaborative meeting experience.
Meeting participants can access, track and review tasks assigned during the meeting within the monday.com tab. Participants can continue to interact with the monday.com board after the meeting to stay updated with the progress.
The Marketing Manager submits his report in the channel, where the Excel sheet will be stored in the Files tab and a cloud-enabled repository for future reference.
Use Excel's analytical abilities within Teams to build reports and share them with your team. The full canvas of Excel along with all controls are available to be leveraged right within Teams.
Enable distributed teams to work effectively together from brainstorming with digital sticky notes to planning and managing complex workflows. The Marketing Manager uses the Miro app to collaborate over a poster design.

**Poster Design**

Here are some things that must be added in the EPK:

- Trailer
- Poster
- Stills for press
- Logline
- Synopsis - short version
- Bios contacts
- Social media, website, etc.

Also consider adding the following:

- Behind the scenes stills
- Behind the scenes interviews - especially any name stars or special guests
- Synopsis - long version
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.
Add a OneNote tab to your channel in Microsoft Teams and use it as a shared space for notes among team members. The Marketing Manager uses it to create an itinerary and upload it in a tab in the channel.
Co-author and edit Word documents within Teams. The questions drafted for cast interview are shared with team members in the channel.
Contoso subscribers have been experiencing poor network signal at Greenwood, Seattle. It is required that the maintenance crew resolves the network problem for uninterrupted services. Meanwhile, the backlash in social channels is closely monitored and mitigated by the Marketing Analyst.

- Integrates Twitter and SharePoint to monitor tweets with relevant hashtags using Power Automate within Microsoft Teams.
- Reviews the posts in the channel with the Marketing Manager to analyze the results of the social media scan.
- Coordinates with the Maintenance and Repairs Manager about the status of the issue.
- Views an overall Social Media Scorecard Power BI tab set up in the channel to help plan remedial measures and campaigns.

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

- Quick teamwork and action made possible through channel communication.
- Real-time tracking of social media impact via integration of Power Automate set up in a tab within Teams.
- SharePoint lists enable easy update and tracking of important lists.
- Facilitation of data-driven decisions informed by visualizations and scoring in Power BI for Microsoft Teams.

Which app integrations on Teams made it possible?

- Website
- SharePoint
- Power Automate
- Power BI
Configure a SharePoint List to a channel either as a website tab or as a SharePoint app to provide access to important lists. Here the Marketing Manager configures a SharePoint list that's connected to Power Automate to keep track of tweets within a channel.
Add Power Automate to a channel to manage flows. The Marketing Analyst uses Power Automate to configure a flow that automatically saves tweets that contain a specific hashtag.
The Marketing Analyst integrates a tab to bring in tweets with specific hashtags using Microsoft Flow. Create a custom Flow to scan social media for information related to comments about products and auto-save the tweets to a SharePoint List.
The Marketing Analyst uses channel communication to inform her team when the equipment is resolved. Intense in moments of work flurry, these channels also see a fair amount of levity with GIFs and emojis that makes working together fun!
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.
Setting Up an Experience Kiosk
Marketing Manager

Scenario Walkthrough

Contoso Telecommunications is one of the first ISP that has obtained 5G connectivity in Seattle. To spread the word and let more people experience the benefits of this technology, the company has decided to install a kiosk at the Northwind Mall. See how the Marketing Manager uses Microsoft Teams to plan and achieve their goals.

- Schedules team meetings to brainstorm marketing ideas.
- Shares relevant news articles via Bing News.
- Uses OneNote to collect ideas for an effective marketing strategy.
- Requests the Marketing team to create a PowerPoint presentation about an experience kiosk
- Uses Adobe Sign to sign contract agreements with the mall.

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

- Conduct channel meetings to communicate and coordinate with the marketing team.
- Bing News to find relevant news to the specific topic.
- Collaborate, edit and draft ideas with the marketing team using OneNote.
- PowerPoint to draft effective presentations.
- Adobe Sign to easily e-sign documents without leaving Teams.

Which app integrations on Teams made it possible?

- PowerPoint
- OneNote
- Adobe Sign
- Bing News
Search the most relevant news for your work on topics you care about and the Bing News connector will deliver them right to your team. The Marketing Manager shares relevant article using Bing News.
Complete meeting solutions in Teams support screen sharing, recording, video and audio conferencing. Scheduling Assistant feature suggests times that are optimal for all attendees.
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.
With Microsoft Teams, the PR 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!
Marketing – Setting Up an Experience Kiosk

Store and share important files within a dedicated, cloud-enabled repository with Files. Design documents such as the PowerPoint containing the details for setting up an experience desk are shared using PowerPoint.
The Marketing Manager delegates tasks to team members through channel communication. The @mention feature ensures that team members don’t miss out on messages that need their attention!
Send a document for e-signature and track the signing process at every step—right from the Adobe Sign tab within Teams. The Legal team prepares a contract for the vendor agreement.
Contoso is looking into exploring new markets to ensure they stay ahead of the curve. Business Development Manager suggests the company should launch a web series in Spanish as it would open new frontiers and expand its customer base. See how he collaborates with the Marketing team to plan with ease of communication in Microsoft Teams.

- Shares a power BI report showing a shrinking subscriber base in the US and increased subscribers internationally.
- Receives an analysis report from a business analyst regarding which location should be focused on.
- Discusses the plan of introducing a new web series to target local markets where good subscriber growth is possible.
- Finalizes the idea of creating a new web series in Spanish that would increase the subscriber growth by 40% and bring good revenue.

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

- Useful market insights are obtained using Power BI.
- @mention feature attracts the attention of relevant team members.
- Channel communication makes the discussion and implementation of the new idea easier.
- Live captions with attribution make meetings more inclusive and help everyone stay on the same page during calls.

Which app integrations on Teams made it possible?

Power BI
Dedicated teams and channels enable instant group collaboration. The Business Development Manager posts concern about shrinking customer base and schedules a meeting to discuss ideas.
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.
Live captions enable you to keep track of conversations with accurate attribution ensuring you know who is speaking and when. The Business Development Manager enables live captions during the meeting.
A Power BI dashboard offers a visually rich view of current and projected data. The Business Development Manager uses Power BI to understand subscriber growth trends.
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.
Facilitate data-driven decisions informed by visualizations and scoring in Power BI for Microsoft Teams. The Marketing Analyst shares new opportunity using Power BI.
Close out conversations in channels once your project objectives have been achieved. The files shared during the discussions will be added to the Files tab in the channel for quick access.
Movie Promotion at Theme Park
Marketing Associate

Scenario Walkthrough

Contoso Studios’ pirate-themed movies have been a cult favorite in the market for a decade now. The latest film in the franchise is going to be released soon, and Contoso Theme Park will be part of the promotional events. See how the Marketing Associate creates the plan for a two-day event using the native features of Microsoft Teams.

- Receives an important update using @mention and conference calling feature.
- Coordinates, ideates and collaborates with the team to plan out a large-scale event.
- Shares design samples in a PDF format.
- Submits an expenditure sheet in the channel where the information will be stored in the Files tab.
- Receives an approval from the Finance Manager regarding the budget of the event.

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

- Open channel meetings keep team members on the same page.
- Effective channel communication with @mention feature for quick updates.
- Create impactful summaries of crucial data with Smartsheet.
- Draft suggestions with team members in real-time by using Freehand by InVision.
- Use task assignment and delegation capabilities of Tasks by Planner and To Do for speedy plan mobilization.

Which app integrations on Teams made it possible?

PDF
Smartsheet
Tasks by Planner and To Do
Freehand by InVision
The Marketing Manager sets the movie promotion plan in motion in the channel, roping in relevant team members to help with planning. The teams uses the @mention feature to call their attention to the post, which also sends out a notification in their Activity Feed.
With Microsoft Teams, you can easily schedule meetings and find the best available times for invitees through the native scheduling calendar.
Microsoft Teams conversations are threaded so users can reply directly in-context to specific conversations or tabs, while keeping relevant discussions and files grouped together.
Marketing – Movie Promotion at Theme Park

The deeply integrated Tasks by Planner and To Do within Microsoft Teams enables speedy plan mobilization using task assignment and delegation. The Marketing Associate views assigned tasks with the Tasks by Planner and To Do app that can be pinned in any channel in Microsoft Teams.
Collaborate, ideate and draft solutions on an infinite white boarding space with Freehand by InVision in Teams. The team uses the Freehand by InVision app to visualize props for a movie character.
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.
Deeply integrated Adobe services make it easier to view PDF files in Microsoft Teams without leaving the application. Sketches are shared using Adobe PDF file format.
The Marketing Manager uses channel communication to inform the team that the merchandise designs are ready. Intense in moments of work flurry, these channels also see a fair amount of levity with GIFs and emojis that makes working together fun!
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.
Whether it is listing important expenses or analysis reports, Smartsheet in Teams is a powerful documentation tool. The Marketing Associate uses a Smartsheet tab to build an expenditure report and share it later with her team.

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<thead>
<tr>
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Network Capacity and Demand Planning

Team Lead

Scenario Walkthrough

Contoso Media is a mid-sized media production and distribution company. They have been in the industry for many years, and the company credits their success to their work in predicting industry trends. The Team Lead in charge of planning the network capacity is tasked with projecting Contoso's future capacity and ensuring that Contoso is well-prepared to meet future demand. He leverages collaboration, documentation, and analytical tools within Microsoft teams to work with team members to make quick and precise forecasts.

- Schedules a meeting to discuss the plan to forecast Contoso's network capacity using channel communications.
- Creates and assigns tasks using MeisterTask to ensure everyone works towards the same goal with coordination and transparency.
- Views a dashboard with historical data shared by the Analyst using Power BI within a channel.
- Discusses research feedback with the Marketing Manager in a private group chat.
- Creates a presentation with all the compiled research and capacity projections using PowerPoint.
- Schedules a call and shares the final presentation with the Leadership team for discussion using channel communications.

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

- Utilize Power BI to compile and review data in a highly visual format.
- MeisterTask helps manage tasks efficiently with intuitive project and task management capabilities.
- PowerPoint helps draft effective and easily consumable presentation on a proposed plan.

Which app integrations on Teams made it possible?

Power BI  PowerPoint  MeisterTask
Teams and channels are where you hold meetings, have conversations and work on files together with team members. The Team Lead begins discussion in the channel over new shows.
With Microsoft Teams, the Team Lead can schedule meetings without difficulty and find the best available times for invitees through the native scheduling calendar.
MeisterTask is a simple yet powerful task management and collaboration tool that perfectly adapts to your team’s workflow and lets you work together more efficiently. The Team Lead can organize and track tasks with the MeisterTask tab in any channel in Microsoft Teams.
Microsoft Teams enables transparent communications through channel conversations. The Analyst 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 Team Lead can dive into this wealth of analytical data shared using Power BI.
With Microsoft Teams, the Team Lead can schedule meetings without difficulty and find the best available times for invitees through the native scheduling calendar. Meeting threads make follow-up conversations a breeze, and even fun!
Create and share PowerPoint presentations over a Teams call to make meetings meaningful and to offer attendees a visual representation of key points covered.
Sales

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

Sales Superpowers in Teams

Capabilities and features used...

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

Apps that enable an immersive experience in Teams

[Images of various apps including 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

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.”

• Identify potential market and analyst competitor strategies
• Drive sales efforts towards potential markets
• Prepare forecasts and analysis for different markets

Sales Manager

“I play an exciting game of numbers everyday. I work with marketing to improve our numbers and create sales reports for the finance team to assess.”

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

Account Manager

“How you sell matters. What your process is matters. But how your customers feel when they engage with you matters more.”

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

Sales Manager

“Setting up goals is the first step in turning the invisible into visible.”

- Manage organizational sales by developing a business plan that covers sales, revenue and expense controls
- Meet planned sales goals
- Set up individual sales targets with the sales team
Forecasting Sales and Conducting Gap Analysis

Sales Analyst

Scenario Walkthrough

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

• Creates a channel for the purpose within the sales team and sends a message highlighting the purpose of the team.
• Sends out a meeting invite to discuss forecasts, actual outcome and competitor strategies.
• Uses Trello to assign tasks to team members to work on gap analysis.
• Team members use a shared Excel to build the gap analysis and use PowerPoint for ease of data consumption.
• Reviews the report in PowerPoint and requests changes.

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

• Build reports, documents, and presentations online in the cloud with Excel and PowerPoint.
• Channel meetings and conversation keep discussions in context with key players.
• Assign tasks to team members with transparency using Trello.

Which app integrations on Teams made it possible?

Excel  PowerPoint  Trello
Teams and channels are where you hold meetings, have conversations and work on files together with team members. They are built around a topic, a department name, or even just for fun.
The Sales Analyst 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 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 spreadsheet will be stored in the Files cloud-enabled repository for future reference.
Store and share important files within a dedicated, cloud-enabled repository with Files. The customer analysis is shared via a PowerPoint presentation.
Building a Sales Summary

Sales Manager

Scenario Walkthrough

The Sales team constantly interfaces with Marketing and Finance team 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 accounting. Find out how Teams offers her the platform to coordinate and share business critical information with enterprise security.

• Creates an exclusive team for Sales, Marketing and Finance managers to sync their efforts.
• Sends a meeting invite to the Finance Manager to discuss the need for a sales summary.
• Uses OneNote to capture meeting notes.
• Assigns tasks to her team using channel communication.
• Reviews the summary created by the sales executive in the Excel spreadsheet.

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

• Use a dedicated team to prepare and collaborate on a plan of action for business-critical tasks.
• Create impactful summaries of crucial data with Excel and OneNote for Microsoft Teams.
• Share documents, slide decks and materials through the Files tab repository.

Which app integrations on Teams made it possible?

OneNote
Excel
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.
When the Sales Manager creates a meeting invite, she can use the native scheduling calendar to check for optimal meeting time for all attendees.
Quickly disseminate meeting outcome, notes and action items among team members with OneNote tabs that can be pinned to any channel.
A team associate submits her report in the channel, where the Excel sheet will be stored in the Files tab and a cloud-enabled repository for future reference.
The sales 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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Preparing for a Monthly Review
Account Manager

Scenario Walkthrough

Contoso Movies continues to lead as one of the best production houses in Hollywood. The Sales team for Contoso leverages the TRPs and viewership numbers for their television shows. Reviewing their performance is a monthly routine for the Managers. See how the Account Manager syncs up with the Sales Manager for a monthly review.

- Views a reminder post in the channel regarding the monthly review.
- Submits Monthly Sales Report to the Sales Manager.
- Joins Teams meeting for a monthly review with the Sales Manager.
- Posts an update on action items in a 1:1 chat conversation.

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

- Use Office tools such as Word, Excel and OneNote cohesively from one platform without saving multiple versions locally.
- Use the meeting thread to continue conversations pertaining to action items, thereby keeping conversations in context.

Which app integrations on Teams made it possible?

- OneNote
- Excel
An exclusive channel for members of a team who collaborate regularly helps maintain a history of past communications while keeping the newest conversations and files accessible.
Sales – Preparing for a Monthly Review

The Account Manager submits her report in the channel, where the Excel sheet will be stored in the Files tab and a cloud-enabled repository for future reference.
Quickly reach out to and chat with co-workers. Take conversations away from channels for 1:1 discussions. The Account Manager provides a quick update over chat after the review meet.
Identifying and Closing a Major Sales Opportunity
Sales Manager

Scenario Walkthrough

The Sales Manager at Fabrikam AI keeps himself up-to-date with the latest news across industries and potential 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 Teams help the Sales Manager execute his roles and responsibilities?

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

Which app integrations on Teams made it possible?

Calendar BOT  Woobot  Q  PowerPoint
Module 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.
Sales – Identifying and Closing a Major Sales Opportunity

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.
Sales – Identifying and Closing a Major Sales Opportunity

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.
Sales – Identifying and Closing a Major Sales Opportunity

Store and share important files within a dedicated, 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.
Finance

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

Finance 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

Finance

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<th>Director (Finance)</th>
<th>Editorial Director</th>
<th>Finance Associate</th>
</tr>
</thead>
<tbody>
<tr>
<td>&quot;In the end, all business operations can be reduced to three words: people, product, and profits.&quot;</td>
<td>&quot;Don't write long post because they're quick to write. Instead, write them because they're the best format for communicating your idea and helping your reader.”</td>
<td>&quot;A big part of financial freedom is having your heart and mind free from worry about the what-ifs of life.&quot;</td>
</tr>
<tr>
<td>• Oversee policies, objectives, and initiatives for region</td>
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<tr>
<td>• Monitor and evaluate current and proposed systems and procedures</td>
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<tr>
<td>• Establish overall direction and strategic initiatives for the given major function or line of business</td>
<td>• Plan the contents of publication and interact with the concerned authorities for its approval</td>
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<tr>
<td></td>
<td>• Interact with the editorial managers and editor-in-chiefs and allocating them work respectively</td>
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<tr>
<td></td>
<td>• Develop all editorial content and implement all strategies</td>
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<td></td>
<td>• Analyze various financial services and solutions to ensure achievement of financial targets</td>
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<td></td>
<td>• Coordinate with clients to analyze requirements and design customized financial strategies</td>
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<td></td>
<td>• Assist clients to complete all their wishes and develop strategies</td>
<td></td>
</tr>
</tbody>
</table>
Meet the Business Decision Makers

Finance

Production Manager

“For every hour of recording, we have two hours of laughter in the studio.”

• Plan, organise and schedule shoots
• Assess project and resource requirements
• Estimate, negotiate and agree on budgets and timescales with clients and managers
Raising Finances for an Upcoming Film
Finance Director

Scenario Walkthrough

Contoso’s upcoming project is going to be a big budget production and the studio must take a call on how to raise finances through various means – selling music rights, satellite rights, equity financing and more. See how the Finance Director collaborates with other team members to accomplish the activity using Microsoft Teams.

• Hosts a channel meeting to discuss the working on various mechanisms to raise money for the project.
• Refers to the key pointers discussed during the meeting, noted by the Finance Associate using OneNote.
• Reviews a Smartsheet showing the previous expenses to produce the previous parts of the franchise.
• Refers to an Excel containing data of the preceding film’s box office collection and video sales revenue.
• Refers to Asana for assigned tasks to the team members for initiating related activities.

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

• OneNote for shared access to the information.
• Smartsheet for tabular user interface to use formulas in templates.
• Office applications like Excel allow quick access to shared reports and information.
• Integrated Asana helps assign, track and communicate tasks and milestones.

Which app integrations on Teams made it possible?

- Excel
- OneNote
- Smartsheet
- Asana
Use channel conversations to relay updates to team members and begin a process flow for task completion. The Finance Director kick-starts discussion over raising finances for the new movie project.
Complete meeting solutions in Teams support screen sharing, recording, video and audio conferencing. Hold seamless calls in Teams with enhanced security.
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.
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.
Add Smartsheet sheets, dashboards, and reports as ‘Tabs’ within a Team channel. The team views costs for the project in a Smartsheet tab.
The Finance Associate submits his report in the channel, where the Excel sheet will be stored in the Files tab and a cloud-enabled repository for future reference.
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.
Close out conversations in channels once your project objectives have been achieved. The files shared during the discussions will be added to the Files tab in the channel for quick reference in the future.
With Asana’s work management platform, your team can stay focused on their goals, projects, and tasks—no matter when or where they work.
Planning and Coordinating the Coverage of a Sporting Event

Editorial Director

Scenario Walkthrough

Contoso is a large news organization that is preparing to cover the Olympic games. The Editorial Director in-charge of the coverage of this event reaches out to team members and leverages communication tools and applications within Microsoft Teams to ensure that all technical and budgetary requirements are listed out and are approved to ensure a hassle-free coverage of the Olympics.

• Shares the Olympic games schedule in a tab within the channel for easy access.
• Responds to a tab conversation and shares suggestions regarding interviews to be scheduled for the Olympics.
• Reviews event requirements and budget details shared by team members within an Excel tab in a channel.
• Suggests inclusion of interview schedules in the task board created using Huddo Boards.
• Schedules a meeting with the Finance Director to discuss the budget and get requisite approvals using channel communication.

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

• Pin a website tab at the top of a channel or conversation, so everyone has easy access to important sites.
• Create, assign and track progress of tasks within Microsoft Teams using Huddo Boards.
• Add any Excel spreadsheet as a tab for easy access and collaborative work.
• Catch the attention of relevant team members using the @mention feature.

Which app integrations on Teams made it possible?

Website Excel Huddo Boards
Dedicated teams and channels enable instant group collaboration. The Editorial Director kick-starts discussion over planning for the Olympics coverage.
Finance – Planning and Coordinating the Coverage of a Sporting Event

Complete meeting solutions in Teams support screen sharing, recording, video and audio conferencing. Scheduling Assistant feature suggests times that are optimal for all attendees.
Owners and team members can add more tabs to a channel or chat by clicking Add a tab at the top of the channel or chat. The Editorial Director adds the Olympics website for a quick reference.
Huddo Boards is a collaborative task management solution for Teams, Individuals, and invited external parties. Huddo Boards in Teams allows the Editorial Director to track tasks, see assignments, status and manage workflows without leaving the application.
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.
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 a one-on-one chat or a group chat for conversations that don’t require the entire team. The Finance Director reaches out to the Editorial Director and discusses the coverage plan.
Creating a Budget for a Game Launch Event

Finance Associate

Scenario Walkthrough

With the game’s launch just a month away, Contoso’s team is working at a feverish pitch to get everything in order. The Marketing team is working jointly with the Finance Team to ensure the launch is smooth and yet glitzy. See how the Finance Associate uses Microsoft Teams to collaborate with various teams to get the launch event’s budget approved.

- Receives a notification from the Marketing team regarding the launch event.
- Acknowledges an Excel sheet containing venue availability and other related details sent by the Marketing Associate.
- Collaborates with the Marketing team for event planning.
- Creates the budget with all the estimated costs of the launch event with Smartsheet and sends it for Approval.
- Incorporates the Finance Director’s feedback and views a PowerPoint presentation shared within the channel.

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

- Use Places to select, discuss and share locations.
- Streamline the approval process with Approvals in Microsoft Teams.
- Create summaries of crucial data with Office applications like Excel and OneNote.
- Share concise presentations with team members using PowerPoint.
- Create, track and assign tasks and milestones with Smartsheet.
The Marketing Manager kicks-off planning over an online meeting and the team keeps conversations and relevant documents all in the meeting thread for easy reference.
Location sharing becomes easy within Microsoft Teams with Places. The team members are working on finalizing a location for game launch event and they use Places to share a shortlisted venue.
The Finance Associate employs Excel’s analytical abilities within Teams to share a list of available venues along with the total expenditure.
Record meeting notes or observations in OneNote app inside Teams and share them when needed with the team for their consumption. The Marketing Manager shares planned activities in a OneNote tab.
Send, receive, manage, and share approvals in Microsoft Teams with the Approvals app. The Finance Associate links a Smartsheet tab with the Budget and sends it to the Director for his approval.
Track your approvals and get notified of updates at each step. The approvers are notified when requests are sent for their approval and the senders are notified as soon as their requests are approved.
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.
PowerPoint helps draft and present an effective and easily consumable presentation for the team. The Finance Associate views a PowerPoint presentation created by a team member.
Add Smartsheet sheets, dashboards, and reports as ‘Tabs’ within a Team channel. The launch event budget is shared using Smartsheet.
Finalizing the Location and Cast for the Film
Production Manager

Scenario Walkthrough

As the Director and the Producer work on finalizing the cast and the locations, the Production Manager must ensure that the locations and the crew members that they are looking for are available for the shoot when the work starts. After getting the final cast and locations list, the Production Manager creates a budgetary requirement and gets necessary approvals. See how the Production Manager uses Microsoft Teams to execute his tasks.

• Gets on a call with the Director and Producer to understand the present requirements.
• Receives an excel from the Director with a list of studios needed to be booked for shoots.
• Shares an Excel with details of costumes and props shortlisted.
• Reviews the location through a video meeting with the Location Team Lead.
• Uses Shifts to plan the entire shooting schedule.
• Shares a Smartsheet detailing the budget for the film.

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

• Office applications like Excel allow quick access to shared reports and information.
• Detailed view and easy access to the budget obtained using Smartsheet.
• Sharing and executing contracts without leaving Teams interface with Adobe Sign.
• Create, update and manage schedules for the team using Shifts.

Which app integrations on Teams made it possible?

Excel Smartsheet Adobe Sign Shifts
Meetings can either be triggered instantly or scheduled using through the native scheduling calendar. The team meets online using Teams and continues their conversation in the same thread for easy future reference, including sharing analysis using Excel spreadsheets.
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.
Team members can employ Excel's abilities within Teams to build a list of film sets available for shoot and share it in the channel as requested.
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. The location team shares actual location views using video call.
Add Smartsheet sheets, dashboards, and reports as ‘Tabs’ within a Team channel, helping teams bring conversations together with a current view of projects.
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.
Finance – Finalizing the Location and Cast for the Film

The Production 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!
Create, update, and manage shift schedules for your teams with Shifts in Microsoft Teams. The Production Manager plans the entire shooting schedule using Shifts.
Send a document for e-signature and track the signing process at every step—right from the Adobe Sign tab within Teams.
Headquarters

Check out how the operations 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

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

Marketing Manager

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

- Execute branding activities and marketing communication
- Manage relationship with media and PR agencies
- Oversee the loyalty program’s reach and performance for the organization

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
Meet the Business Decision Makers
Headquarters

**Safety and Compliance Manager**

“It costs less to be safe every day than to make one careless mistake along the way.”

- Develop and oversee control systems to prevent or deal with violations of legal guidelines and internal policies
- Evaluate the efficiency of controls and improve them continuously
- Revise procedures, reports etc. periodically to identify hidden risks or non-conformity issues

**Director**

“If I’ve said it once, I’ve said it a hundred times: Always 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
Presenting a Value Proposition to a Client
Business Development Manager

Scenario Walkthrough

Contoso’s Business Development Manager is looking to sign off an agreement with Fabrikam Airlines, one of the most sought-after aviation companies in the country. Fabrikam has introduced a game-changing initiative that will reduce their carbon emissions by 80%. Here’s how Microsoft Teams makes it easier for him to communicate with the client using the guest access feature.

• Offers a value proposition to the client that showcase their capabilities and expertise in the industry.
• Gets on a video call with the team to discuss client needs.
• Collaborates with her team members to understand the requirements of the client.

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

• Use a private team to communicate and collaborate with potential partner, share all the details before the contract is signed.
• Utilize Office tools like Word to share crucial information with team members.
• Brainstorm, ideate and communicate using native features of Teams like group chat and group video call.
• Add e-signatures to documents and move your workflows faster with Adobe Sign.

Which app integrations on Teams made it possible?

Word Adobe Sign
The Business Development Manager uses a dedicated team to prepare and offer a final proposal to the client for an ad campaign. A team can even include external members through providing guest access.
For Fabrikam Airlines

Thank you for considering Contoso Media for your marketing needs. I’m glad we had the opportunity to connect so that me and my team could get a clear understanding of your expectations. We specialize in working with aviation companies in the country.

Unlike our competition, we focus on a holistic approach to digital as well as print marketing by looking at your best practises, your target market, and your core values. We approach a different methodology on how to craft an authentic message which resonates directly with your customers.

By using social media strategies and implementing procedures based on the results of extensive analysis, a study of social media marketing trends, and the application of specifics unique to Fabrikam Airlines, we are confident in our ability to deliver effective results through your social media channels.

We believe our proposal provides a complete social media marketing strategy that will culminate in highly successful results for your business.

If you have any questions, please feel free to get in touch. My contact information is below.

Thank you,
Henrietta Mueller
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.
Collaborate with your team through channel communications using @mention to tag required personnel and keep conversations around the topic in a single thread. The team schedules meetings and shares files within the same thread too.
Meet with team members anywhere, anytime. When scheduling meetings, the Business Development Manager uses the native scheduling calendar in Teams to find the best available time slots for meeting invitees.
Strategizing Solutions for Customer Retention

Marketing Manager

Scenario Walkthrough

Contoso is a telecommunications company and takes a very customer-centric approach towards structuring their products and marketing strategies. When the Regional Manager realizes that declining customers over the past few months are likely to lead to a harder road to meeting targets for the financial year, he gets together with the Marketing Manager to help strategize an effective solution. The Marketing Manager leverages powerful analytical and communication tools within Microsoft Teams to strategize a way forward.

- Receives notification from the Regional Manager regarding weak user acquisition for the quarter via channel communications.
- Communicates with team members and strategizes a way forward using channel meetings.
- Views tasks assigned and changes the task status using MeisterTask for Microsoft Teams.
- Views insights and analytics shared by the Marketing Analyst using Power BI within a channel tab.
- Creates a strategy and shares it with team members using PowerPoint.
- Views insights shared by the Regional Manager and Finance Manager using Word.
- Discusses the strategy and implementation with team members and later updates team members of significant improvement via channel communications.

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

- Track important live analytics within a channel using Power BI for Microsoft Teams.
- Create presentations and upload content with shared access using Office 365 for Microsoft Teams.
- Create, assign and track tasks within Microsoft Teams using MeisterTask.

Which app integrations on Teams made it possible?

- Power BI
- Word
- MeisterTask
- PowerPoint
The Regional Manager kicks-off planning over an online meeting to discuss user acquisition 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 seamless calls and conferences and share screens with enhanced security.
Enable simple yet powerful task management and collaboration tool that perfectly adapts to your team's workflow and lets you work together more efficiently with MeisterTask. The Regional Manager assigns and tracks tasks with a MeisterTask tab 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 services.
A Power BI dashboard offers a visually rich view of current and projected data. The Marketing Manager uses Power BI to understand data consumption.
Deeply integrated Office 365 services allow you to create and share PowerPoint presentations in the channels with ease. The Marketing Manager shares strategy @mentioning relevant personnel to grab their quick attention.
Enjoy powerful document creation and editing with the complete canvas and toolset of Word right inside Teams. Collaborate on team documents easily and easily store them in Files for each channel.
Meetings can either be scheduled or triggered instantly (using Meet Now).
Close out conversations in channels once your project objectives have been achieved. The files shared during the discussions will be added within the Files tab in the channel for quick access.
Partnering with a Video Streaming Service

Chief Operating Officer

Scenario Walkthrough

Contoso Telecommunications has partnered with Fabrikam, a video streaming service, to reach out to a wider audience and provide services that add value to its existing customer base. The Chief Operating Office uses Microsoft Teams to coordinate with the Marketing, Finance and Tech teams to execute a smooth integration of services across all verticals.

- Announces the partnership across teams and channels.
- Schedules a meeting and shares a PDF that lays out an outline of the partnership commitments via channel communications.
- Views the minutes of the meeting shared on OneNote.
- Responds to the Finance Manager and approves processes via 1:1 chat.
- Views integration details and documentation shared by managers in the Files tab.
- Reviews a compiled presentation of the strategic execution of cross-functional tasks using PowerPoint within a channel and appreciates team members for their contribution.

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

- Share documents, slide decks and other material from the Files tab repository.
- Build and share presentations online in the cloud with PowerPoint.
- Channel meetings and conversations keep discussions in context with key players.
- Personal 1:1 conversation for quick approvals within Teams.

Which app integrations on Teams made it possible?

- PowerPoint
- OneNote
- PDF
The Chief Operating Officer announces the new partnership across teams and channels with a single message. Microsoft Teams also allows you to choose between multiple channels for the message to be posted to.
The Chief Operating Officer announces the new partnership 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.
Plan meetings or keep them impromptu, according to team members’ availability, which reflects in the native scheduling calendar. Hold seamless calls and conferences and share screens with enhanced security.
Give team members quick access to tools, services, and files with Microsoft Teams Tabs. The Chief Operating Officer shares the partnership outline PDF in a tab.
Enjoy collaborative and powerful document creation with OneNote in Microsoft Teams. A team member uses OneNote to create minutes of the meeting and share them with the team.
Headquarters – Partnering with a Video Streaming Service

Quickly reach out to and chat with co-workers. Take conversations offline from channels for 1:1 discussions. The Finance Manager provides a quick update over chat about the processes adopted by the other team.
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 Files tab in each channel is a cloud-enabled repository, where team members can store and share important files within a dedicated space.
Microsoft Teams conversations are threaded so users can reply directly in-context to specific conversations. The @mention feature helps grab quick attention of the relevant team members.
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.
Planning Routine Safety Drills
Safety and Compliance Manager

Scenario Walkthrough

Contoso believes that all their theme parks should develop and implement an emergency plan to protect guests, employees and property under any unforeseen circumstances. The Safety and Compliance Manager takes charge and collaborates with team members using Microsoft Teams to schedule safety drills across sites.

- Schedules a meeting, and brainstorms ideas and suggestions on organizing safety drills with team members by employing Freehand by InVision.
- Creates a task board for plan implementation with several columns/cards/buckets and moves the tasks between them using a Tasks by Planner and To Do board.
- Creates and shares templates for emergencies using Word and houses these files within the channel for future reference.
- Announces company-wide updates using Company Communicator.

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

- Freehand by InVision for collaborating on new ideas to devise an action plan in real-time.
- Tasks by Planner and To Do helps track and communicate tasks and milestones without having to switch applications.
- Office application like Word to create templates right within Microsoft Teams.
- Leverage corporate communication and the group broadcast capabilities of the Company Communicator app within Teams.

Which app integrations on Teams made it possible?

- Freehand by InVision
- Tasks by Planner and To Do
- Company Communicator
- Word

254
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.
Collaborate, ideate and draft solutions on an infinite white boarding space with Freehand by InVision in Teams. The Safety and Compliance Manager uses the Freehand by InVision app to draw up the disaster routine drill.
Easily schedule meetings and find the best available times for invitees through the native scheduling calendar. The Safety and Compliance Manager uses this feature to schedule a safety drill discussion.
Microsoft Teams conversations are threaded so users can reply directly in-context to specific conversations, while keeping relevant discussions and files grouped together.
Enjoy powerful document creation and editing with the complete canvas and toolset of Word right inside Teams. Collaborate on team documents easily and store them in Files for each channel.
The Safety and Compliance Manager assigns and tracks tasks with a Tasks by Planner and To Do tab in the channel. This provides clarity to the team members regarding the tasks they need to pick up and close out.
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.
Upgrading Streaming Services

Director

Scenario Walkthrough

Streaming music on mobile devices and other home devices has been on the rise throughout the world, and hence Contoso has decided to upgrade its music streaming services. See how the Director utilizes Microsoft Teams to present forecast metrics and quantify data to steer the company to get ahead of the competition and make the right decision.

- Studies customer interest and chalks out a plan to introduce a new service.
- Creates a video to present a case for high-quality audio offerings on Contoso’s music streaming app via Prezi Video.
- Seeks more research about promotions, costs, profitability, and forecasts.
- Analyzes revenue opportunities for the new service and decides to go ahead with the plan.

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

- Shared access to Office 365 tools like Word and Excel enables the team to refer to the data and edit it in real-time.
- PowerPoint in Teams help to present case studies and prospects for a new service.
- Wiki enables note-taking abilities right within the channel.
- Using various metrics and charts, Power BI in Teams helps to analyze complex data quickly.

Which app integrations on Teams made it possible?

- Power BI
- Word
- Prezi Video
- Excel
Microsoft Teams enables transparent communications through channel conversations. The Director communicates in open-channel conversations about the plans to launch high quality streaming services.
Enable visual communication tool that puts you and your content together on the same screen to make interactive and effective videos in mere minutes. Easily create and share video updates to make your messages more effective with Prezi Video in Microsoft Teams.
Add Wiki tab to your channel and use it as a community notepad where your team will have shared access. The Director shares her research about music streaming services in a structured manner in Wiki tab.
Channels facilitate instant group communication. Team members stay in the know and can share information directly in the conversation thread to accelerate decision making.
Promotion and Distribution Strategies for High-Quality Music

For Contoso

The first analysis was undertaken to get an overview of who was in the participants’ listening niches at different periods of their lives. The data used in the analysis were, for each of six cohorts, how much they were listening to the music of each of 10 music decades (6 cohorts × 10 music decades). This was found for the different periods of their lives (0–12 years, 13–19 years, 20–29 years, 30–39 years, 40–49 years, and 50–65 years); the data for listening when over 65 was too sparse to include. The same data (6 cohorts × 10 music decades) were compiled for whom they were listening to the music with (parents, siblings, other family members, friends or peers, with spouse or partner, with children, or alone).

Figures show the results of a principal components analysis done on these data. The arrows point in similar directions if they were listening to similar music at these times of their lives with these individuals. It shows that when the participants were ages 0–12, they were mostly often listening to music with their parents, by ages 13–19, they were listening more with siblings and other family members. Then later, through their 20s, they were more often listening alone or with friends and peers. By ages 30–39, music was listened to with spouse or partner, and then with children for participants in their 30s and 40s. The first (horizontal) dimension accounted for 48.1% of the variance in the data; the second (vertical) dimension accounted for 32.3% of the variance, for a total of 80.4% of the variance. Overall, the results suggest a regular progression of listening with different groups of people throughout the life span ranging from parents in early life to children in later life.
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.
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.
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.
Facilitate data-driven decisions informed by visualizations and scoring in Power BI for Microsoft Teams. The Financial Director uses a Power BI tab pinned to the channel to review analysis of various streaming services.
Legal and Compliance

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

Legal and Compliance 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
Legal and Compliance

**Business Development Manager**

“Turnaround or growth, it’s getting your people focused on the goal that is still the job of leadership.”

- Coordinate development of cost-effective products
- Manage resources across different centers
- Communicate plans and strategies between team members

**Account Manager**

“My goal is to provide customers personalized services to make sure they keep coming back to us.”

- Manage multiple clients and accounts
- Offer special packages to companies or organizations hosting large events
- Work in tandem with other airlines to plan better routes for passengers
Finalizing Distribution Partners
Business Development Manager

Scenario Walkthrough
Contoso’s film project is nearing completion, and the Business Development team is working on negotiations of distribution agreements with various partners such as multiplexes, DVD companies, satellite networks, streaming apps, and ancillary outlets such as airlines. See how the Business Development Manager collaborates with her associates using Microsoft Teams.

• Hosts a channel meeting to discuss the distribution plan.
• Refers to a Power BI report of current trends of moviegoers
• Discusses offers of different distribution partners and assigns respective tasks to the team using monday.com.
• Receives a PDF file of contract for partnering with multiplex chains and streaming apps.
• Mails the contract document to the Director for a final sign-off.

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

• Office applications like Excel for quick access to shared reports and information.
• Organize, structure, and streamline all programs, projects, and processes with monday.com.
• Power BI facilitates data-driven decisions informed by visualizations and scoring right within Microsoft Teams.
• Adobe Sign enables you to add e-signatures to documents and move your workflows faster.

Which app integrations on Teams made it possible?
Power BI  Adobe Sign  Excel  monday.com
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.
A meeting is set up in the channel to flesh out the distribution plan and a meeting invite is sent to relevant team members and decision makers. The Business Development Manager hosts a meeting to communicate the distribution plan.
Store and share important files within a dedicated, cloud-enabled repository with Files. The team shares files in the channel to collaborate on distribution plan.
A Power BI dashboard offers a visually rich view of current and projected data. The Business Development Manager uses Power BI to gain useful insights into viewer trends.
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.
monday.com powers teams to organize, structure, and streamline all programs, projects, and process. The monday.com app in Microsoft Teams helps the Business Development Manager track and close tasks related to the finalizing distribution partners.
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!
After the process of analyzing, there’s more good news for the team members. The happy news is disseminated using a channel and employees share their delight in the conversation thread.
Sign and send documents, contracts, and digital forms for e-signature and approval directly from a tab in the Microsoft Teams interface using Adobe Sign.
Seamless Client Communication and Documentation

Account Manager

Scenario Walkthrough

The Account Manager at Contoso speaks to Fabrikam Media, who wants to avail two services that Contoso is offering for the coverage of the Olympics. She shares the email sent by the representative from Fabrikam with the Legal team to ensure that all client requirements are officially agreed upon and met with.

• Shares an email of the client expressing their interest to go ahead with two services within a channel in Microsoft Teams.
• Communicates the client’s decision with the Corporate Counsel to kickstart the process of making the agreement official.
• Views the agreement shared by the Corporate Counsel using Adobe Sign for Microsoft Teams.
• Congratulates the client for signing the contract and expresses her excitement for the collaboration using channel communications.

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

• Share an email and all of its attachments into a channel within Microsoft Teams.
• Sign documents, send them for legally binding e-signatures and approvals right within a Teams channel.
• @mention feature to take relevant stakeholders for quick communication.
• Use a dedicated team to prepare and collaborate on a plan of action for business-critical tasks.

Which app integrations on Teams made it possible?

Adobe Sign
Microsoft Teams allows the team to communicate in open-channel conversations and keep team members up-to-date. The Marketing Manager updates the team about partnership email and shares in the channel.
Collaborate with your team through channel communications using @mention to tag required personnel and keep conversations around the topic in a single thread.
Sign and send documents, contracts, and digital forms for e-signature and approval directly from a tab in the Microsoft Teams interface using Adobe Sign. The partnership agreement is sent out for e-signature.
Customer Service

Check out how the operations 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

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

Customer Service Associate

“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
Generating a Customer Satisfaction Index

Customer Service Manager

Scenario Walkthrough

In order to understand the perception of customers regarding Contoso Network’s products and services, the Customer Service Manager is tasked with the responsibility to conduct a survey and generate a customer satisfaction index for her region. She accomplishes this objective using Teams as the forum to communicate and collaborate with team members.

- Creates a new channel within the team and adds team members who will help her execute her task.
- Shares a customer survey form with team members for review and requests them to use the form to gather customer responses.
- Uses Tasks by Planner and To Do within Teams to set and track daily survey goals.
- Collects individual reports of the responses and schedules a meeting on Teams to review the collected data.

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

- Native features like conference calling with screen share help ensure everyone is on the same page.
- Tasks by Planner and To Do integration in Teams eases task management.
- External applications like Forms help members collaborate to create a desired set of questions.
- Dive into a wealth of analytical data with Power BI without leaving Teams.

Which app integrations on Teams made it possible?

Power BI
Forms
Tasks by Planner and To Do
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 conduct customer survey.
Integrated Forms application within Teams helps systematically gather customer feedback and suggestions. The Customer Service team uses Forms to conduct customer satisfaction surveys.
The Customer Service Manager assigns and tracks tasks with a Tasks by Planner and To Do tab in the channel. This provides complete clarity for the team members regarding the tasks they need to pick up and close out.
The deeply integrated Tasks by Planner and To Do within Microsoft Teams enables speedy plan mobilization using task assignment and delegation. The Customer Service Manager can organize and track tasks with the Tasks by Planner and To Do tab in any channel in Microsoft Teams.
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, she can use the native scheduling calendar to check for optimal meeting time for all attendees.
Close out conversations in channels once your project objectives have been achieved. The files shared during the discussions will be added within the Files tab in the channel for quick access.
Build dynamic data visualizations, measure metrics, and track analytics through Power BI within Teams. The Customer Service Manager can dive into this wealth of analytical data shared using Power BI.
Responding to Customer Complaints
Customer Service Manager

Scenario Walkthrough

A customer is experiencing problems while logging into the new Contoso mobile application. The Customer Service Manager notices a sudden spike in the number of customers reporting issues while logging into the app. The Contoso application development team is informed about the issue on Teams, and the App Engineer begins to troubleshoot and fix the issue before more customers are affected by it.

- Uses Power BI to pick up trends in application issues.
- Creates a Zendesk ticket for resolving the issue.
- Co-ordinates with the Application Engineer to track progress.
- Notifies the team once the customer can successfully log into the application.

How did Microsoft Teams help the Customer Service Manager to Execute her Roles and Responsibilities?

- 1:1 chat helps to gain further clarity of the issue and fix it soon.
- View tickets and collaborate on them using Zendesk.
- Power BI to gain app insights.
- @mention feature to attract attention of relevant members immediately.

Which app integrations on Teams made it possible?

- Power BI
- Zendesk
Facilitate data-driven decisions informed by visualizations and scoring in Power BI for Microsoft Teams. The Customer Service Manager uses a Power BI tab pinned to the channel to review application insights.
Create dedicated channels to facilitate instant group communication. The Customer Service Manager creates a ticket for customer login issue in the dedicated channel.
1:1 chat conversations can be turned into a call, according to the participants’ convenience. The Customer Service Manager and the Engineer opt for a call to troubleshoot the issue.
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 Customer Service Manager and the Engineer.
Retaining Customer Loyalty with Timely Assistance
Customer Service Associate

Scenario Walkthrough

A Contoso customer finds his SIM card is not working for his smartphone. A Customer Service Associate attempts to help the customer and realizes she is not equipped to solve the issue and needs to escalate to a Tier 2 Service Agent. See how the Customer Service Associate leverages Microsoft Teams to execute this escalation promptly to maintain customer loyalty.

- Shares the customer details, which also includes the purchase location by using Places.
- Uses Zoom.ai Assistant to search the product knowledge base in Teams.
- Gets in touch with an Assistant to figure out an estimated cost for repairing with Excel.
- Escalates the issue to a Tier 2 Service Agent and raises a ticket using Asana as she is unable to provide the correct solution.
- Acknowledges the ticket closure update from the Service Agent.

How did Microsoft Teams help the Customer Service Associate to execute her roles and responsibilities?

- Share locations and zip codes using the integrated Places application.
- Compile and review critical data on cost analysis using Excel.
- Automate meeting scheduling, reserve rooms, and access essential information with the integration of Zoom.ai Meeting Assistant inside Teams.
- Turn conversations into action items in Asana to keep work on track with Asana.

Which app integrations on Teams made it possible?

- Excel
- Places
- Zoom.ai Assistant
- Asana
Once the Customer Service Associate gets the customer details, she posts them in the channel tagging the SIM purchase store location using Places in Microsoft Teams.
Customer Service – Retaining Customer Loyalty with Timely Assistance

Zoom.ai Assistant lives inside of Microsoft Teams to help you offload and automate everyday tasks including finding information anywhere in your organization with one quick search. The Customer Service Associate uses Zoom.ai Assistant to search for SIM pricing details.
Create and share Asana tasks within a channel to quickly clear blockers and discuss issues. The Customer Service Associate shares an Asana task in a channel thread.
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.
See activity about your Asana work items updates directly in your Microsoft Teams channel. The Customer Service Associate shares ticket closure update in the channel.
Information Technology

Check out how the operations 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
- 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

Information Technology

Game Coder

“Programming isn't about what you know; it's about what you can figure out today.”

• Develop and implement game software
• Monitor the game design for full implementation and for expected performance
• Work closely with a lead programmer to create task/project deliverables

Photographer

“We are making photographs to understand what our lives mean to us.”

• Determine desired images and picture composition; and select and adjust subjects, equipment, and lighting to achieve desired effects
• Develop and print exposed film, use touchup tools, send film to photofinishing laboratories for processing

Analyst

“To be a good analyst, you need to know what the trends are and what teams are doing.”

• Gather data about consumers, competitors and market conditions
• Analyze data using statistical software
• Prepare reports and present results to clients as well as to the management
Meet the Business Decision Makers
Information Technology

Systems Engineer

“The advance of technology is based on making it fit in so that you don't really 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
Audio Design & Gameplay Programming

Game Coder

Scenario Walkthrough

With the new game’s 3D modelling underway, the Game Coder must now start working on programming and layering the audio in. See how the Game Coder uses Microsoft Teams to create the game’s beta version and fix bugs after reviewing feedback from play testers.

• Gets notification from the Lead Programmer to fix coding errors in the game.
• Requests coding feedback & implements all the required revisions.
• Collaborates with the Programming team to create the beta version for play testers.
• Implements the play-testing feedback and creates a more stable build.

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

• Efficient task management with Trello.
• Interactive meetings for creative purposes with Freehand by InVision.
• OneNote to document and share feedback effectively.

Which app integrations on Teams made it possible?

- Freehand by InVision
- OneNote
- Trello
Microsoft Teams enables transparent communications through channel conversations. The Game Coder communicates in open-channel conversations and keeps his team lead up-to-date about the roadblocks.
Create checklists, have tasks assigned to the team, complete tasks and review their deadlines without leaving Teams using integrated Trello.
With Microsoft Teams, the Lead Programmer can schedule meetings without difficulty and find the best available times for invitees through the native scheduling calendar.
Collaborate with your team through channel communications using @mention to tag required personnel and keep conversations around the topic in a single thread.
Freehand by InVision is an infinite whiteboard where your team can co-draw, wireframe, plan, present, and give feedback. The team collaborates over Freehand by InVision.
Meetings can either be scheduled or triggered instantly using the Meet Now feature. The finance team meets online using Teams and continues their conversation in the same thread for easy future reference.
Microsoft Teams conversations are threaded so users can reply directly in-context to specific conversations, while keeping relevant discussions and files grouped together.
Add a OneNote tab to your channel in Microsoft Teams and use it as a shared space for notes among team members. The team puts its feedback about the game in a pinned tab for easy access.
Resolving Technical Issues
Photographer

Scenario Walkthrough

A photographer from Contoso covering the Olympics is unable to access the company website and portal to carry on with his work. He finds out the other team members are facing the same issue and then reaches out to the tech team for help. The engineer quickly investigates the issue with the company website and works to resolve the bug and ensure that the team on the ground can get back to a hassle-free workflow.

• Reaches out to a team member to find out whether he is facing issues with website access.
• Views the company website within a channel tab and sees the same error message.
• Sends a channel message detailing the issue he’s facing and @mentions the IT team.
• Responds to the Engineer and @mentions other team members who are facing the same issue via channel communications.
• Thanks the IT team for their quick response and resolution.

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

• Use @mentions to bring in the relevant stakeholders into conversations for fast issue resolution.
• Pin a website tab at the top of a channel or conversation, so everyone has easy access to important sites.
• Make use of 1:1 chat for quick and private communications.

Which app integrations on Teams made it possible?

Website
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 photographers.
Give team members quick access to tools, services, and files with Microsoft Teams Tabs. You can even pin a website in a tab for quick access. The Photographer notices he cannot access the pinned website.
@mention a person, channel or team to make sure your message reaches the relevant personnel. The Photographer alerts the IT team about the website being inaccessible and gets the issue resolved.
Choosing an Ideal Location for 5G

Analyst

Scenario Walkthrough

Contoso has planned to roll out 5G data connectivity to the entire region of California. The Analyst reaches out to team members to understand the technical requirements and limitations and chooses the most ideal location to begin the task. She leverages communication tools and applications within Microsoft Teams to ensure quick and effective completion of tasks.

- Receives a notification from the Technical Product Manager regarding the plan to roll out 5G services.
- Reaches out to the Telecom Engineer to understand the technical requirements and limitations over a 1:1 chat.
- Views the requirements shared by the Telecom Engineer using Microsoft Word.
- Shares important findings and analytical data to be considered in picking a location within the channel using Power BI.
- Updates the team of his findings and shares the selected locations using Places.
- Receives praise from the Technical Product Manager for her contributions in the successful 5G roll-out.

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

- Facilitation of data-driven decisions informed by visualizations and scoring in Power BI for Microsoft Teams.
- Reach out to team members for quick communication and file sharing with 1:1 chat.
- Look up and share details of locations with a channel using Places.
- Integrated Office applications like Word to execute tasks within Teams.

Which app integrations on Teams made it possible?

- Power BI
- Word
- Places
- Praise
Use a dedicated team to prepare and collaborate on a plan of action. The Product Manager creates an exclusive team for Marketing and Engineering team members to sync their efforts.
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. The Analyst and the Telecom Engineer use this feature to discuss location requirements.
1:1 chat need not be restricted to only text. The team members can use audio or video calling to initiate discussions on the Teams platform.
5G Requirements

Below are important factors that need to be considered before selecting a location to roll out 5G:

1. Cell site density
2. Local Permits
3. Procurement Feasibility
4. Device Availability
5. Support Infrastructure
Once the locations for the 5G services rollout are finalized, an announcement is posted in the channel tagging the location using Places in Microsoft Teams.
Channels facilitate instant group communication. Team members stay in the know and can share information directly in the conversation thread to accelerate decision making.
Facilitate data-driven decisions informed by rich analytical visualizations in Power BI for Microsoft Teams. The Analyst offers consumer analysis using Power BI.
Send acclaim to your employees and coworkers with Praise. Deliver in a chat, or for wider recognition, send it in a channel conversation. The team members are praised for their effort.
Troubleshooting and Repairs

Systems Engineer

Scenario Walkthrough

Contoso Media IT team must remain on its toes to troubleshoot issues as they arise. As one of the employees raises alert over printer access, the Systems Engineer must address it asap. See how he uses the tools and features built in Microsoft Teams to resolve it.

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

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

• Use Service Desk Plus Cloud to log tickets and initiate a conversation.
• Personal 1:1 and channel conversations to gain clarity on the issue with Files tab to store documents.
• Seamless meeting calls with screen share right inside Teams.
A team associate uses channel communication to inform his team about the printer issue. The Systems Engineer gets an alert as the IT Manager @mentions him for helping the team associate.
Use a one-on-one chat or a group chat for conversations that don't require the entire team. The Systems Engineer quickly reaches out to the employee using 1:1 chat.
1:1 chat conversations can turn into a call, according to the participants’ convenience. The Systems Engineer and the employee opt for a call to troubleshoot the issue.
Tabs in Microsoft Teams allow you to display rich and interactive web content to your team. The Crisis Coordinator posts a visual summary of the results in the pinned tab.
Human Resources

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

Human Resources 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

Human Resources

Hiring and Training Manager

“Hiring and induction programs for new employees are core functions of my job. We want to attract the best talent at Contoso.”

- Create induction programs for new hires
- Counsel managers on candidate selection
- Present training programs
- Maintain job requirements and job descriptions for all positions

Client Servicing Executive

“If people know you’ll go to any lengths for your client, they’re less likely to play games with you.”

- Collaborate with the relevant departments to better address client needs
- Demonstrate excellent communication and problem-solving skills at all times
- Cultivate solid relationships with clients

Director

“Diversity means including people with different perspectives, different experiences, different opinions and perhaps different working styles or expectations.”

- Guide organizational efforts on diversity and inclusion
- Direct training initiatives on cultural competency, gender differences, disability and sexual harassment
- Assess equal opportunity issues and progress through periodic reports
Meet the Business Decision Makers

Human Resources 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 recruitment, interview, selection, and hiring processes
• Bridge management and employee relations by addressing demands, grievances or other issues
Talent Acquisition
Hiring and Training Manager

Scenario Walkthrough
Contoso intends to hire interns who will transition into full-time employees but first needs to ensure that they are hiring the right people. The Hiring and Training Manager uses Teams to expedite and automate the lengthy hiring and HR process.

• Creates an exclusive team and channels to shortlist resumes and candidates for different job functions.
• Uses Tasks by Planner and To Do to assign potential candidates to the open roles.
• Uses screen share in a channel meeting with HR associates to present candidate resumes housed within the Files tab.
• Shortlists candidates for the interview and pins a OneNote tab with interview questions for candidates.
• Uses Disco to reward the HR Manager for helping him to shortlist the candidate.

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

• Collaborative documentation through established channels using Office applications like Word.
• Hold seamless calls and conferences and share screens with enterprise security.
• Co-author shared information with your team members within a channel with OneNote.
• Assign, monitor and execute tasks within Microsoft Teams using Tasks by Planner and To Do.
• Recognize employees by giving them compliments using Disco.

Which app integrations on Teams made it possible?

Word
OneNote
Tasks by Planner and To Do
Disco
The Hiring and Training Manager uses an exclusive channel to shortlist resumes and candidates for different job functions. The @mention feature allows him to tag relevant personnel to help him with the task.
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.
Meetings can either be scheduled or triggered instantly using the Meet Now feature. The HR team meets online using Teams and continues their conversation in the same thread for easy future reference.
During a meeting, participants can use rich meeting capabilities such as video, screen sharing, file sharing, meeting notes and chat to make the meeting engaging and productive. Needless to say, meetings are fully supported on mobile clients too!
Tasks by Planner and To Do in Teams helps the Hiring and Training Manager break down his tasks efficiently and assign stakeholders for each task, without having to leave the Teams environment.
Add a OneNote tab to your channel in Microsoft Teams and use it as a shared space for notes among team members. The Hiring and Training Manager uses it to save interview questions for candidates.
Build strong cultures, celebrate employee achievements, and reinforce their core values, all without having to leave Teams using the integrated Disco app. The Hiring and Training Manager appreciates efforts by his associates.
New Employee Training
Client Servicing Executive

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 an Invitation for onboarding.
• Logs in and completes the onboarding process.
• Receives a welcome message from the Manager.
• Follows the link and downloads the Teams app on Phone.
• Gets on a call with the team to understand the workflow.
• Completes the entire training program with the help of the Manager.
• Views the message that was broadcasted to the entire team regarding precautionary measures via Dynamic Signal.

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

• Stay up to date on company events, manage attendance and get to know co-workers using Hibob.
• Access training documents through a dedicated Files tab.
• Broadcast content from your community to your organization with Dynamic Signal.

Which app integrations on Teams made it possible?

- PowerPoint
- Dynamic Signal
- Hibob
@mention a person, channel or team to make sure your message reaches the relevant personnel. The Hiring and Training Manager welcomes new members and shares relevant files in the channel conversation.
Store and share important files within a dedicated, cloud-enabled repository with Files. Training documents such as the PowerPoint containing code of conduct among other things are housed here for the team’s easy access.
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.
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 Hibob and personalize onboarding to fuel a sense of belonging from day one. The new employee gets an invitation for onboarding through Hibob.
Dynamic Signal provides a news feed of content that lives inside of Microsoft Teams. The Client Servicing Executive can even track who is reading what content to measure the communication reach.
Scenario Walkthrough

Contoso is an equal opportunity employer committed to creating a diverse workspace. The HR Leadership achieves this by routinely examining the hiring process. The leadership team spearheads the task by collaborating with HR associates.

- Posts message in HR hiring channel requesting an analysis of hiring trends, diversity efforts, and attrition data.
- Responds to queries and replies from Human Resources Associates on his post.
- HR associates present their data using a Power BI dashboard.
- Consumes the insights from the dashboard using Power BI through slices, filters, etc. right inside Teams.
- Appreciates teams’ efforts and presentation at short notice.

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

- Reach entire team by creating conversation threads in channels.
- Keep track of responses with alerts in the activity feed, thanks to @mentions and reply notifications.
- Utilize Power BI to compile and review data in a highly visual format.
Channels facilitate instant group communication. Team members stay in the know and can share information directly in the conversation thread to accelerate decision making.
Tabs let the team work directly with tools and data, and have conversations about the tools and data, all within the context of the channel or chat. An HR associate pins the report in a tab for discussion.
Facilitate data-driven decisions informed by visualizations and scoring in Power BI for Microsoft Teams. The HR associates present their data to the Director using a Power BI dashboard.
New Health Benefits for Employees and On-site Workers

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 exclusive perks and benefits to encourage them for better performance. The HR manager works with the hiring 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 experience.
- Collects responses from employees with a survey employing Forms.
- Reviews an analysis shared by the Finance Manager using Excel.
- Sends out a company-wide announcement about the new health benefits via Communities.

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

- Excel 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.
- Drive engagement in your organization through Communities.

Which app integrations on Teams made it possible?

Communities  Excel  Forms
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.
When the HR Manager creates a meeting invite, he can use the native scheduling calendar to check for optimal meeting time for all attendees.
Collaborate with your team through channel communications using @mention to tag required personnel and keep conversations around the topic in a single thread. The HR Manager kickstarts a process to do a survey on new plans and benefits.
Integrated Forms application within Teams helps systematically gather employee feedback and suggestions.
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.
The HR 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.
Yammer communities connect the organization, enabling you to engage with leaders, watch live events, and stay up-to-date with news and announcements.
Microsoft Teams

Ready to broadcast?

aka.ms/goTeams