Microsoft Teams for Real Estate and Construction
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
- Preparing for a Construction Quality Audit
- Coordinating the Replacement of Malfunctioning Equipment
- Creating Plan for an Eco-Friendly Project
- Installation of Cameras for Live Updates
- Organizing Transport for Employees
- Submitting an RFP Response

Sales & Marketing
- Appointing a Brand Ambassador
- Devising a Digital Marketing Plan for Brand Building
- Analyzing the Latest Housing Trends to Boost Sales
- Building a Sales Summary
- Preparing for a Monthly Review
- Forecasting Sales and Conducting Gap Analysis

Sales & Marketing (Contd.)
- Monitoring Negative Responses
- Promoting a New Eco-Friendly Building
- Identifying and Closing a Major Sales Opportunity
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**Environment, Health & Safety**
- Planning Routine Safety Drills
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Maintenance & Property Management
- Planning Annual Maintenance for a Residential Property
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Human Resources
- New Health Benefits for Employees and On-site Workers
- Strengthening the Workplace Community
- Employee Engagement
- New Employee Training
- Review of Hiring Process by HR Leadership
Operations

Check out how the Operations team members can use Microsoft Teams to keep business operations 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

**Project Manager**

“No matter how good the team or how efficient the methodology, if we’re not solving the right problem, the project fails.”

- Collaborate with the engineers and architect to finalise design of a building/project
- Monitor progress of work and assign tasks to employees
- Plan and select resources and materials

**Site Supervisor**

“I ensure all operations on site run smoothly and employees don’t face any obstacles in their work.”

- Supervise functioning of the entire site to ensure all process run smoothly
- Co-ordinate with team members to compile list of malfunctioning equipment and find a solution for it
- Manage allocation and safety procedures to be followed when installing new equipment

**Operations Manager**

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

- Ensure operational costs are minimum
- Conduct operational audits and ensure process compliance
- Prepare operational reports for the management
- Plan inventory, purchase material and monitor warehouse efficiency
Meet the Business Decision Makers

Operations

Quality Control Lead

"Quality means doing it right when no one is looking."

- Establish and evolve formal QA processes to ensure that the team is working as per quality standards
- Oversee all aspects of quality assurance including establishing metrics to ensure quality goals are met
- Lead and mentor QA team members

Construction Manager

"It is not the beauty of a building you should look at; its construction of the foundation that will stand test of time."

- Manage and oversee the day-to-day construction management
- Monitor construction productivity and schedule performance, investigate reasons below par performance
- Adhere to company safety standards and promote safety among employees

Project Manager

"Managing construction projects is akin to being a master puppeteer—you must be able to move multiple strings at the same time."

- Define and track project subcontractor milestones
- Perform site visits
- Create bidding packages for the subcontractors
Preparing for a Construction Quality Audit
Quality Control Lead

Scenario Walkthrough

Contoso strives to maintain high quality standards across all its construction sites. The Quality Control Lead notifies the team of a construction quality audit that’s scheduled to be conducted the following week. She uses Microsoft Teams to help all team members gear up and make sure that every aspect of the construction meets the high standards expected of a Contoso project.

• Notifies team members of an upcoming audit via channel communications.
• Schedules a meeting to discuss the plan to ensure that they are prepared for the audit.
• Creates a Tasks by Planner and To Do task board and assigns quality check tasks to the relevant team members.
• Shares a PDF of the process outline with the entire team.
• Coordinates creation of quality check reports with OneNote and channel communications.

How did Microsoft Teams help the Quality Control Lead execute her roles and responsibilities?

• Quick teamwork and action made possible through channel communication.
• Note taking in a group OneNote allows team members to have shared access to the information.
• Integrated Tasks by Planner and To Do helps assign, track and communicate tasks and milestones without having to switch apps.
• Show appreciation to peers who went beyond work through Praise.

Which app integrations on Teams made it possible?

OneNote
Tasks by Planner and To Do
Praise
PDF
Dedicated teams and channels enable instant group collaboration. The Project Manager uses the Quality and Compliance channel to announce the QA audit and sets up a 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.
The deeply integrated Tasks by Planner and To Do within Microsoft Teams enables speedy plan mobilization using task assignment and delegation. The Project Manager can organize and track tasks with the Tasks by Planner and To Do tab in any channel in Microsoft Teams.
Customize a team with tabs. Add tabs for files, notes, websites and apps – it makes it easy for team members to access frequently used content or services with just one tap. The Project Manager pins the QC process outline as a tab in the channel.
The Project Manager shares the process outline as a PDF document using the deep integration of Adobe with Microsoft Teams.
The Project Manager uses OneNote within Microsoft Teams to share a sample report, without having to leave the application. OneNote serves as a team notebook to the entire group, pinned to a channel.
With Praise in Microsoft Teams, share badges to celebrate every success, communicate your appreciation with your team members, and foster greater comradery. As the audit is completed successfully, the Project Manager appreciates efforts of her team by sending them Praise badges.
Replacing Malfunctioning Equipment
Site Supervisor

Scenario Walkthrough

Well-functioning equipment is at the core of an effective construction project. The Site Supervisor notifies the team members of a construction lift that has broken down and communicates a quick work-around to the team members. He relies on Microsoft Teams to quickly coordinate efforts to replace the construction elevator and ensures that the project continues to progress at a steady pace to meet scheduled timelines.

• Notifies the team of the malfunctioning elevator and communicates a workaround in the dedicated channel.
• Communicates the issue to the Construction Manager via 1:1 chat.
• Coordinates efforts to compile a list of malfunctioning equipment using Forms.
• Manages the allocation of new equipment to the construction workers and shares a list of new items purchased via OneNote.
• Shares the equipment safety standard using the Way We Do application within the channel.

How did Teams help the Site Supervisor execute his roles and responsibilities?

• Overcome complex set of hurdles and avoid communication gaps with channel meetings and conversations.
• Track and compile a list of malfunctioning equipment with Forms.
• Maintain a team notebook for important notes and lists using OneNote.
• Find and share policies, procedures, checklists and processes right within Microsoft Teams using Way We Do.

Which app integrations on Teams made it possible?

Way We Do  Forms  OneNote
The Site Supervisor uses channel communication to inform the maintenance team about construction lift breakdown and suggests a workaround to his team members. The @mention feature ensures that team members don’t miss out on messages that need their attention!
Take conversations off channel and reach out to your team members directly via 1:1 chat. The Site Supervisor apprises the Construction Manager of the situation through a 1:1 chat.
Tabs in channels allow team members to interact with your content and data. The Site Supervisor pins a form as a tab to collect information on tools and equipment that need to be ordered.
Integrated Forms application within Teams helps the Maintenance team systematically gather suggestions for repair and new tools/equipment that need to be purchased.
Microsoft Teams conversations are threaded so users can reply directly in-context to specific conversations. The Construction Manager and the Site Supervisor keep the team updated about new equipment arrival and other details.
Way We Do helps you find and use playbooks, policies, procedures and processes right within Microsoft Teams. Easily view checklists, tasks and requests directly from within Microsoft Teams.
Add a OneNote tab to your channel in Microsoft Teams and use it as a shared space for notes among team members. The Site Supervisor shares the equipment list and their IDs using OneNote.
Planning an Eco-Friendly Project

Project Manager

Scenario Walkthrough

Contoso is planning an eco-friendly approach for one of their prime projects. The Project Manager coordinates with the Architect and the Engineer over Microsoft Teams to plan the construction of a commercial complex by opting for eco-friendly building material and creating a building with net-zero carbon emissions.

- Schedules a meeting to give the team a brief about the new project and to plan the way forward.
- Collaborates with the Engineer over calls and conversations to draft the specifications for the new project using the native features of Microsoft Teams.
- Shares a list of equipment, material, and machinery required for the construction with the team using OneNote.
- Reviews ideas shared by the Architect and Engineer using Freehand by InVision.
- Schedules a meeting to finalize the plan and assigns tasks to team members with Asana.

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

- Enable multi-channel communication through 1:1 chat, channel conversations, and video/audio conferences with team members.
- Collaborate, ideate, and draft solutions with team members in real-time by using an array of applications hosted in the Teams store, e.g., Freehand by InVision.
- Turn conversations into action items to keep work on track with Asana.

Which app integrations on Teams made it possible?

Freehand By InVision  
OneNote  
Asana
Microsoft Teams allows the team to communicate in open-channel conversations and keep team members up-to-date. The Project Manager kick-starts conversation over the new project and sets up a meeting.
Meetings in Teams include audio, video and file sharing. And because they're online, you'll have a meeting space and never need to find a room or projector to share ideas.
1:1 chat conversations can always turn into a call, according to the participants' convenience. The Project Manager and the Engineer begin a conversation through 1:1 chat and continue their discussion over a call.
Quickly disseminate meeting outcome and notes among team members with OneNote. A link to the OneNote tab is shared in the meeting thread after the meeting.
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.
Tabs break channels down even further allowing the team to use the space to work on focused ideas. The Architect shares the blueprint and structural ideas in a tab.
Draw, plan, and collaborate with your team on an infinite whiteboard - in real time with Freehand by InVision. The team uses Freehand by InVision to create a visual representation of their new eco-friendly project.
Complete meeting solutions in Teams support screen sharing, recording, video and audio conferencing. Scheduling Assistant feature suggests times that are optimal for all attendees.
The Project Manager assigns and tracks tasks using Asana within Microsoft Teams. This provides clarity to the team members regarding the tasks they need to pick up and close out.
Operations – Creating Plan for an Eco-Friendly Project

See Asana tasks, projects, portfolios, and status updates within Teams. The Project Manager creates, assigns and tracks tasks within a channel tab.
Installation of Cameras for Live Updates

Operations Manager

Scenario Walkthrough

Contoso Realty is adding a new security feature to its mobile application that will provide homeowners live feed for their homes under-construction. In order to collect live footage for the application, Contoso must install CCTV cameras in every unit of their on-going projects. The operations team, along with IT, handles the process using Teams.

- Informs team members about the task through a channel post.
- Shares a list of under-construction units using Excel and technical specifications of the cameras using Word.
- Schedules a team meeting to identify the right locations for cameras using Freehand by InVision.
- Creates and assigns pre and post-installation tasks using Jira Cloud and monitors them.
- Receives live updates of the installation through channel posts.

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

- Utilize Office tools like Word and Excel to share crucial information and lists with team members.
- Use Jira Cloud to break down and delegate pre and post-installation tasks and keep track of them.
- Collaborate, ideate and draft solutions with team members in real-time by using Freehand by InVision.
Use channel conversations to relay updates to team members and begin a process flow for task completion. The Operations Manager kick-starts a process flow and defines the tasks to take the process forward.
Enjoy powerful document creation and editing with the complete canvas and toolset of Word right inside Teams. Collaborate on team documents easily and store them in the Files tab of each channel. The IT Manager shares the product specifications for the cameras in the channel.
The Operations Manager uses Excel to build and present data to the team. Create impactful summaries of crucial data with Excel, Word and OneNote for Microsoft Teams.
Teams and channels are where you hold meetings, have conversations and work on files together with team members. The Operations Manager sets up a meeting in the channel to discuss the cameras’ installation.
Brainstorm and collaborate during team meetings using digital whiteboards such as Freehand by InVision used by the team here. Integrate convenient applications to continue your work seamlessly within Microsoft Teams.
Freehand by InVision is an infinite whiteboard where your team can collaborate over designs, wireframes, plans, presentations and feedback. The team uses Freehand by InVision to determine locations for the CCTV cameras.
Jira Cloud helps the Operations Manager break down tasks efficiently and assign stakeholders for each task, without having to leave the Teams application.
Channels facilitate instant group communication. Team members stay in the know and can share information directly in the conversation thread. The IT team gives consistent updates on task status in the channel.
When the installation is complete, the Operations Manager appreciates the team’s work and closes out the conversation. The files shared in the conversation remain stored in a cloud enabled repository for future reference.
Organizing Transport for Employees

Construction Manager

Scenario Walkthrough

Contoso believes that the health and safety of its employees is extremely important for an effective construction project. The Construction Manager downloads the time clock report at the end of the day and notices that most workers haven’t checked out. He discovers that the workers are unable to leave the construction site due to incessant rains and coordinates with the Administrator over Microsoft Teams to arrange for transport and ensure that all workers are dropped to the nearest bus stop safely.

- Downloads the daily time clock report and notices that most workers haven’t clocked out.
- Uses channel communication to understand why workers are clocking out late.
- Requests the Administrator to arrange for transport to drop the workers to the nearest bus stop.
- Appreciates the Administrator for resolving the issue quickly.
- Clocks off using the inbuilt time clock feature in Shifts in Microsoft Teams.

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

- Clock in and out of your shifts and track work timings of employees using Shifts.
- Channel conversations with the @mention feature helps catch the attention of relevant team members.

Which app integrations on Teams made it possible?

- Praise
- Shifts
Operations – Organizing Transport for Employees

Time clock feature in the Shifts application makes time tracking a snap. Using the time clock report, the Construction Manager realizes several employees are still at the site.
Dedicated teams and channels enable instant group collaboration. The Construction Manager leverages this communication platform to understand why workers clock out late.
Use Praise to encourage each other at work. The cards can be sent in a 1:1 chat or posted in a channel to show your appreciation to the entire team. The Construction Manager appreciates the effort of a team associate in the channel.
Operations – Organizing Transport for Employees

Using the time clock report in the integrated Shifts application, the Construction Manager can remotely view clock in and clock out details of all employees.
Submitting an RFP Response
Project Manager

Scenario Walkthrough
Contoso gets a Request For Proposal and the team gets on to the task of submitting their response for the priority project. The Project Manager is assigned the task of creating the bid package that will help win Contoso a potential new client. See how the Project Manager collaborates on Teams to present an RFP response that demonstrates all that Contoso has to offer.

- Shares a proposal request document using Word.
- Schedules a team meeting for discussions on creating the bid package.
- Updates the task for the bid package in Trello and shares it within Microsoft Teams.
- Refers to the task assigned to her and acknowledges the same in the channel.
- Completes the assigned task for successful approval and closure of the RFP response.

How did Teams help Project Manager execute her roles and responsibilities?

- Trello allows you to share tasks within a message or a tab to help team members keep track of goals within the channel.
- Word allows creating templates and documents for quick access right within Microsoft Teams.

Which app integrations on Teams made it possible?

- Trello
- Word
Collaborate with your team through channel communications using @mention to tag required personnel and keep conversations around the topic in a single thread. The Director alerts the Project Manager about a Request For Proposal for a new project using Trello.
Use a dedicated channel to prepare and collaborate on a plan of action. The Project Manager creates an exclusive channel to sync efforts on responding to a Request For Proposal and shares the document 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.
With Microsoft Teams, the Program 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.
Meetings in Teams include audio, video and file sharing. And because they’re online, you’ll have a meeting space and won’t need to find a room or projector to share ideas.
Enjoy powerful document creation and editing with the complete canvas and toolset of Word right within Microsoft Teams. A team associate presents the finalized bid using Word.
Keep conversations, meetings and relevant documents all in one place with Microsoft Teams. The Project Manager provides context to the meeting (using Meet Now) through channel post and continues to interact with her team on the same thread.
Keep track of your project by adding your favorite Trello dashboard directly into Microsoft Teams. The Project Manager updates the card/task status in Trello.
Operations – Submitting an RFP Response

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

These scenarios will illustrate how Teams can help different Sales & Marketing roles in quickly turning data into actionable insight, automating manual and repetitive processes and driving better decisions through collaboration.

Sales & Marketing Superpowers in Teams

Capabilities and features used...

• Organize quick, open-channel communication
• Store documents within a cloud-enabled repository with Files
• Real-time, contextual file sharing and co-authoring
• Protectively collaborate with teammates using familiar applications all in a single place

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
Sales & Marketing

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
- Maintain social media presence at both property and corporate level

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

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
Meet the Business Decision Makers
Sales & Marketing

Account Manager

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

- Manage multiple clients and accounts
- Collaborate with internal departments to facilitate client need fulfillment.
- Keep accurate records pertaining to inventory and account notes

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 customer base
- Drive sales efforts towards potential markets
- Prepare forecasts and analysis for different markets

Lead Marketing Analyst

“There’s more objectivity in one customer sharing their passion and love for a product with another than there is in ads or promotion.”

- Monitor social media for customer feedback and complaints
- Create reports to analyze the situation
- Manage marketing associations that propel loyalty to the brand
Meet the Business Decision Makers
Sales & Marketing

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
Appointing a Brand Ambassador
Marketing Manager

Scenario Walkthrough

Contoso is developing a luxury project in an elite neighbourhood. To promote the project and attract the right customer base, the company has decided to hire a renowned face as their brand ambassador. The Marketing Manager collaborates with her team using Microsoft Teams to identify the right celebrity and seal the contract.

- Initiates a channel conversation by sharing the project brief in a Word document.
- Schedules a meeting to brainstorm virtually with team members using Freehand by InVision.
- Reviews a PowerPoint deck shared by a team member containing details of shortlisted celebrities.
- Reviews the celebrity list with the leadership team to pick the brand ambassador.
- Requests the legal associate to create the agreement and shares a signed copy of the same via Adobe Sign.

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

- Utilize Word to compile project brief and other important information.
- Collaborate, ideate and draft solutions with team members in real-time using Freehand by InVision.
- Share concise presentations with team members using PowerPoint.
- Execute contracts via Adobe Sign without leaving Teams.

Which app integrations on Teams made it possible?

- PowerPoint
- Adobe Sign
- Word
- Freehand By InVision
Microsoft Teams enables transparent communications through channel conversations. The Marketing Manager requests her team to begin working on identifying the right brand ambassador and shares the project brief.
Sales & Marketing – Appointing a Brand Ambassador

Enjoy powerful document creation and editing with the complete canvas and toolset of Word within Teams. The Marketing Manager shares the project brief using Word.

Contoso Realty

Project Name:
ABC Estates

Location: Miami, Florida
Set in South Miami – Contoso’s ABC Estates will stand tall at 35 floors, dazzling the city with its shimmering golden facade, and wowing its residents with stunning views of the Sea and the city.

A host of privileges serve to remind its hi-powered residents that they have arrived. The common areas of this glittering tower are designed by a global leader in stylish hospitality interiors.

Amenities at ABC Estates:
- 7 swimming pools
- Evander Holyfield gym
- Fitness regime created by celebrity trainer Ramona Braganza
- Multi-purpose sports court
- Athletics track
- 1 km+ jogging & walking track
- 9-hole golf
- World-class luxury spa
- Well-stocked library
- Meditation pavilions
- Reflexology garden
- Reading areas
- Organic vegetable garden
- Organic herb garden serving herbal infusions
- Fruit orchard
- Organic café serving the freshest teas
- Indoor games room for table tennis, snooker
- Gourmet restaurants and café
- Exclusive café
Complete meeting solutions in Teams support screen sharing, recording, video and audio conferencing. The Marketing Manager creates a meeting invite for the relevant stakeholders.
Draw, plan, and collaborate with your team on an infinite whiteboard - in real time. The Marketing team uses Freehand by InVision to collaborate over the plan to find a brand ambassador.
Channel conversations can contain a lot of things – conversations, files shared by team members, meeting threads, and GIFs! A team associate shares a PowerPoint presentation of shortlisted profiles.
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.

Name: Sara Whitney
Industry: Entertainment
Age: 36

Sara Whitney is a Hollywood actress and environmentalist. She has been a part of several Academy award nominated films and documentaries. She has also received several prestigious awards for her work. Extremely popular with all the generations and is known for her polite and humble personality.

Availability: Available from December 2019
Fees: $2 Million

Manager: Sam Jensen
Give team members quick access to tools, services, and files with Tabs. Tabs allow team members to access services and content in a dedicated space within a channel or in a chat. The contract with the brand ambassador is signed and pinned in the tab.
Sales & Marketing – Appointing a Brand Ambassador

Sign documents, send them for legally binding e-signatures and approvals without leaving Teams. The Marketing Manager shares the contract with the legal team using Adobe Sign.
Devising a Digital Marketing Plan for Brand Building

Marketing Manager

Scenario Walkthrough

Contoso is planning to strengthen its digital presence to stand out from the competition. To achieve this goal, the marketing team needs to devise a digital marketing plan to promote Contoso’s brand image online. The Marketing Manager collaborates with team members to carve out a plan using Microsoft Teams.

• Reviews online marketing trends shared by the Sales Manager using a OneNote tab.
• Schedules a channel meeting and uses Freehand by InVision to brainstorm ideas on the plan.
• Sets deadlines, creates tasks, and assigns responsibilities by employing a Trello tab in the channel.
• Presents the plan to team members with a PowerPoint deck to finalize their digital strategy.

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

• OneNote allows team members to have shared access to important facts and information.
• Freehand by InVision empowers collaborating on new ideas to devise a digital media plan in real-time.
• Trello in Teams helps assign and track tasks without switching applications.
• PowerPoint helps draft and present an effective and easily consumable presentation for the team.
Dedicated teams and channels enable instant group collaboration. The Marketing Manager kicks off a discussion in the channel to draft a digital marketing plan.
OneNote enables collaborative and powerful document creation within Microsoft Teams. The Marketing Manager pins the OneNote tab so that her team can view data about online marketing.
The Marketing Manager schedules a meeting to discuss strategy and a team associate suggests using Freehand by InVision to brainstorm ideas.
Plan meetings or keep them impromptu, according to team members’ availability, which reflects in the native scheduling calendar. Hold protected calls and conferences and share screens with enhanced security.
Sales & Marketing – Devising a Digital Marketing Plan for Brand Building

Draw, plan, and collaborate with your team on an infinite whiteboard - in real time. Freehand by InVision allows the Marketing team to collaborate and visualize their digital marketing plan.
Trello task boards are great for collaborative task management and tracking. The Marketing Manager creates a Trello tab and pins it in the channel for everyone’s reference.
The interactive Trello tab in channels is great for collaborative task management and tracking. The Marketing Manager uses Trello to track tasks for the Digital Media Plan.
Customize a team with tabs. Add tabs for files, notes, websites and apps. As the final plan is ready, the Marketing Manager pins the Word document in the channel for everyone’s 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.
Analyzing the Latest Housing Trends to Boost Sales

Marketing Analyst

Scenario Walkthrough

Contoso believes in anticipating customers’ needs and exceeding their expectations. A Contoso Marketing Analyst must identify the latest trends in the buying behavior of customers. Here’s how he plans to stay ahead of the competition in coordination with the Sales and Marketing team and increase sales using Microsoft Teams.

• Refers to notes on key takeaways and housing trends shared by the Project Manager using OneNote.
• Creates a survey for gathering responses on new designs and trends using Forms.
• Creates a task board with several columns and moves the tasks around using a Trello board.
• Shares the popular design images as per the results of the survey in the channel right within Microsoft Teams.
• Appreciates a team associate’s efforts using Praise.

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

• OneNote allows quick access to notes and reports right within Microsoft Teams.
• Forms helps collect feedback and responses critical for a project.
• Trello helps create task buckets and track work progress without having to switch applications.
• Praise helps sending acknowledgements to co-workers, making the workplace happier.

Which app integrations on Teams made it possible?

- Trello
- Forms
- OneNote
- Praise
Microsoft Teams conversations are threaded so users can reply directly in-context to specific conversations. The Sales Analyst responds to the Project Manager’s post and starts working on the idea shared by her.
Sales & Marketing – Analyzing the Latest Housing Trends to Boost Sales

Tabs allow you to integrate the tools and services you love right into your chat or channel. The Project Manager shares her takeaways by pinning them in a OneNote tab.

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Latest Trends in Real Estate Housing

Tuesday, October 15, 2019 – 11:09 AM

Latest Trends that will Influence Real Estate Housing in Coming Years

**Ways of Living: Greater Interest in Small Scale Homes**

- The Tiny Houses (75% growth) concept emerged strongly at the beginning of 2019. Architects have become more involved in the development of practical and innovative solutions for small spaces.
- Inclusive Architecture
  - [Architecture for the Elderly](#) and different capacities related to mental health and visual impairments.
- Robotics and Automation for Smart Houses
  - Smart Homes Technologies associated with Automation and Robotics join architecture to bring us solutions that increase comfort within our homes, through [Domotics](#).
- Vertical Cities
  - Vertical living is such an obvious solution to the challenge of housing growing urban populations that it was next used in large-scale social engineering.

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[Chart showing latest trends in real estate housing]
Integrated Forms application in Microsoft Teams helps systematically gather customer feedback. The Sales Analyst seeks a survey to zero in on the customer choice over latest design trends.
Forms in Microsoft Teams lets you easily create surveys, quizzes, and polls. The Sales Analyst reviews the results from the survey that are shared in the channel.
Tabs provide a dedicated canvas to see your team's Trello boards, lists and cards. The Sales Analyst creates a Trello task board to assign tasks and track progress, and then pins it in a tab.
Use channel conversations to relay updates to team members. The Sales Analyst shares the most popular choices in a visual format.
Close out conversations in the channel once your project objectives have been achieved. The files shared during the discussions will stay hosted within the Files tab in the channel.
Building a Sales Summary
Sales Manager

Scenario Walkthrough
The Sales team constantly interfaces with the Marketing and the Finance teams to coordinate their efforts, forecasts and analysis. The Sales Manager builds a sales summary for the Finance team to incorporate in their P&L summary. Find out how Teams offers her the platform to coordinate and share business critical information with enhanced security.

- Creates an exclusive team for the Sales, Marketing and Finance managers to sync their efforts.
- Schedules meeting to discuss the need for a sales summary.
- Uses OneNote to view meeting notes.
- Channel conversation in the meeting thread to assign the Sales Executive to help build sales summary.
- The Sales Executive completes the summary and uploads the Excel spreadsheet to the Files tab in the channel for review.
- The Sales Manager tracks the conversation and ensures that her team delivers the spreadsheet.

How did Teams help the Sales Manager 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?

Excel  OneNote
Use a dedicated team to prepare and collaborate on a plan of action. The Sales Manager creates an exclusive team for the Sales, Marketing and Finance team members to sync their efforts.
With Microsoft Teams, you can easily schedule meetings and find the best available times for invitees through the native scheduling calendar. The Sales Manager sends out the meeting invite.
Enjoy collaborative and powerful document creation with OneNote in Microsoft Teams. Quickly disseminate meeting outcome and notes among team members with OneNote tabs in channels.
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.
Breakdown intricate numbers into visually consumable data with Excel. The Excel sheet will be stored in the Files cloud-enabled repository for future reference.
Preparing for a Monthly Review

Account Manager

Scenario Walkthrough

Contoso drives sales efforts by constantly analysing results of previous endeavours and tracking sales outcome. See how an Account Manager syncs up with the Sales Manager for the monthly review.

• Views a reminder post in the channel regarding monthly review.
• Submits Excel report in the channel where the information will be stored in the Files tab.
• Join Teams meeting for monthly review with Sales Manager.
• Posts an update on action items in a 1:1 chat conversation.

How did 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?

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.
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.
After the review meeting, the Account Manager provides a quick update over 1:1 chat to her manager. Take conversations away from channels and engage in 1:1 chat when needed.
Scenario Walkthrough

There are often mismatches between forecasts, predictions, and the outcome. The Sales Analyst must identify gaps and bridge them to be sure they are not missing business opportunities.

- Creates a channel to discuss sale analysis within the sales team and sends a welcome message highlighting the purpose of the team.
- Sends out a meeting invite to discuss forecasts, actual outcome, and competitor strategies.
- Uses Tasks by Planner and To Do to assign tasks to team members to work on gap analysis.
- Team members use a shared Excel to build out the gap analysis and use PowerPoint for ease of data consumption.
- Reviews the report in PowerPoint and requests changes.
- Reviews final draft and passes it on to the leadership team.

How did Teams help the Sales Analyst 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.
- Edit reports and work cohesively as a Team to build reports without leaving the conversations and discussions in Teams.
- Create, assign and track tasks effectively with Tasks by Planner and To Do.

Which app integrations on Teams made it possible?

- Excel
- PowerPoint
- Tasks by Planner and To Do
Teams and channels are where you hold meetings, have conversations and work on files together with team members. The Sales Analyst spells out the purpose in her post and schedules a meeting.

**Forecasting Sales and Analysis**

We have often noticed mismatches between forecasts and the outcome. Given external causes that could not have been factored in, these gaps are understandable sometimes, but they need to be identified and bridged to ensure we do not miss business opportunities. The purpose of this team is to capture these gaps. Let’s meet soon to discuss more...watch out for a meeting invite!

**First Cut – Gap Analysis of Our Key Service Areas**

Hi Team,

I have shared the initial draft of the Gap Analysis. Please have a look and update the sheet as you see fit.

FYI to Adele Vance

Gap Analysis.xlsx

Sales > Forecast and Analysis

3 replies from you and Emily

Emily Braun 10/11 4:04 PM

Start a new conversation. Type @ to mention someone.

Donna

Thanks for meeting everyone. As discussed over the call, I have assigned Planner tasks for everyone. Please have a look here

Here
Sales & Marketing – Forecasting Sales and Conducting Gap Analysis

During a meeting, participants can use rich meeting capabilities such as video, screen sharing, file sharing, meeting notes and chat for an engaging, productive and decisive conversation with each other.
The deeply integrated Tasks by Planner and To Do within Microsoft Teams enables speedy plan mobilization using task assignment and delegation. The Sales Manager can organize and track tasks with the Tasks by Planner and To Do tab in any channel in Microsoft Teams.
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. The team collaborates and shares work for seamless effort.
Break down intricate numbers into visually consumable data with Excel. A team associate presents the gap analysis using Excel.
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.
Monitoring Negative Responses
Lead Marketing Analyst

Scenario Walkthrough

While a new Contoso construction project is under way, residents complain of road blockages and pollution from the construction site. The on-site team coordinates within Teams to ensure that this challenge is addressed. Meanwhile, the backlash in social media channels is closely monitored and mitigated by the Lead Marketing Analyst.

• Automates a flow for tweets with a specific hashtag to be directly posted in a channel via Power Automate.
• Reviews the posts in the channel with the Marketing Manager to analyze the results of the social media scan.
• Evaluates the negative statements and tracks picked up from news agencies.
• Coordinates with the Maintenance and Repair 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 Teams help the Lead Marketing Analyst execute her roles and responsibilities?

• Automate business workflows and track social media activity with Power Automate.
• Facilitation of data-driven decisions informed by visualizations and scoring in Power BI for Microsoft Teams.
• Use a dedicated channel to communicate and coordinate with relevant team members.

Which app integrations on Teams made it possible?

Power Automate
Power BI
Automate routine workflows to simplify tasks using Power Automate. The Lead Marketing Analyst creates a flow to track social media activity.

Details:
Flow: Post on Microsoft Teams when a new tweet matches the specified hashtag
Description: When a new tweet matches the specified hashtags, notify on Microsoft Teams channel.
Owner: Henrietta Mueller

Connections:
- Microsoft Teams
- Twitter

Status: On
Created: Apr 12, 01:04 PM
Modified: Apr 12, 01:36 PM
Type: Automated
Plan: Per-user plan

28-day run history:
When your flow runs, you'll see its history here.
Channel conversations are a great way to track the status of a task. The Lead Marketing Analyst reviews the social media response after getting the issue resolved.
Tabs makes it easy for team members to access frequently used content or services with just one tap. The Marketing Manager views the social media scorecard tab, setup in the channel.
A Power BI dashboard offers a visually rich view of current and projected data. The Lead Marketing Analyst uses Power BI to breakdown the social media scorecard driven by visualizations and scoring in Power BI for Microsoft Teams.
Promoting a New Eco-Friendly Building
Marketing Manager

Scenario Walkthrough

Contoso prides itself in taking a sustainable and environmentally responsible approach in all its ventures. Contoso Realty has developed a new eco-friendly venture. The Marketing Manager collaborates with the marketing team over Microsoft Teams to strategize and create an impactful marketing plan.

- Schedules a meeting to discuss a marketing campaign for Contoso’s new environment-friendly project.
- Creates and assigns tasks to team members with Tasks by Planner and To Do.
- Views ideas shared in the marketing challenge created by the Marketing Analyst with HunchBuzz.
- Approves billboard locations shared by the Marketing Analyst via channel communications.
- Schedules a meeting to present the final marketing strategy to the Director and the rest of the team.

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

- Use a dedicated channel to communicate and coordinate with relevant team members.
- Execute tasks within Teams using Office applications like Tasks by Planner and To Do and PowerPoint.
- Crowdsources ideas from employees, partners, and customers using HunchBuzz.
- Use of Places application to inform channel members about the identified locations for billboards.

Which app integrations on Teams made it possible?

- PowerPoint
- HunchBuzz
- Tasks by Planner and To Do
- Places
Microsoft Teams enables transparent communications through channel conversations. The Marketing Manager sets up a meeting to discuss marketing strategy for their new eco-friendly project.
Meetings in Teams include audio, video and file sharing. And because they’re online, you'll have a meeting space and won’t need to find a room or projector to share ideas.
Tabs makes it easy for team members to access frequently used content or services with just one tap. The Marketing Manager pins the Tasks by Planner and To Do tab for everyone to view their tasks.
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.
Crowdsourcing ideas from your team members using HunchBuzz without leaving Teams. The Marketing Manager pins the tab in the channel for team members to collaborate over marketing ideas.
Microsoft Teams conversations are threaded so users can reply directly in-context to specific conversations, while keeping relevant discussions and files grouped together.
Location sharing made easy! Once the locations for the billboards are finalized, a team associate announces it in the channel using Places in Teams.
Keep conversations and relevant documents all in one place with Microsoft Teams. The Marketing Manager provides context to her requirement by sharing and continues to interact with her team on the same thread.
The magic of visual presentations with PowerPoint. The Marketing Manager presents the final strategy to the leadership team using PowerPoint.
Identifying and Closing a Major Sales Opportunity

Sales Manager

Scenario Walkthrough

The Sales Manager at Fabrikam AI always 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 Microsoft 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.
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.
The Sales Manager kicks-off discussion over an opportunity and triggers an instant meeting using Meet Now feature. The team keeps conversations and relevant documents all in the meeting thread for easy reference.
The Sales Manager reaches out to a Contoso representative using 1:1 chat. Use this feature when you don’t need the whole team.
Compare open times on your calendar to open times on any of your Approved Contact's calendars using Calendar BOT. The Sales Manager uses the bot to schedule meeting with Contoso representative.
Access critical Salesforce CRM data in real-time and keep your team updated of important sales developments with Woobot. The Sales manager uses Woobot to update the lead status and notify the team of the meeting scheduled.
Channel conversations are a great way to track the status of a project as they can contain everything related to the project: discussion threads, files, and meeting notes. A PowerPoint presentation is shared to elaborate on solutions for Contoso.
Store and share important files within a protected, 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 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.
Environment Health & Safety

These scenarios will illustrate how Teams can help various members of the Environment Health & Safety team communicate effectively to ensure timely decisions and positive business outcomes.

Environment Health & Safety Superpowers in Teams

Capabilities and features used...

- Participate in instant, open-channel communication
- Store documents within a cloud-enabled repository with Files
- Real-time, contextual file sharing and co-authoring
- Channel Tabs for everyone to stay on up-to-date
- Protectively collaborate with teammates on multiple projects from a single platform

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
Environment, Health & Safety

Project Manager
“Plans are only good intentions unless they immediately degenerate into hard work.”

- Plan project resources
- Assemble and lead project team
- Monitor budget and spends
- Ensure process flow, time management and quality

Analyst
“When I work a game as an analyst, all I do is look at the game like a coach.”

- Analyze the market trends
- Create reports based on the analysis to share with the team
- Plan on promoting the brand name to gain more customers

Director
“If I’ve said it once, I’ve said it a hundred times: Always be prepared!”

- Monitor compliance with all leases, contracts and use agreements
- Recommend policies and resolutions
- Prepare departmental goals and objectives
- Ensure the complete security of the teams
Meet the Business Decision Makers
Environment, Health & Safety

Safety Manager

“My job is to be there at the need of the hour and ensure complete safety of the employees.”

- Develop and execute health and safety plans in the workplace according to legal guidelines
- Manage damage caused and prepare reports of casualties
- Provide a complete end to end support to all employees in case of accidents

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
Planning Routine Safety Drills
Safety and Compliance Manager

Scenario Walkthrough

Contoso Construction believes that every facility should develop and implement an emergency plan to protect employees, helping them avoid loss of life and property under any unforeseen circumstances. The Safety and Compliance Manager takes charge and collaborates with the team members using Microsoft Teams to schedule safety drills across various 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 Trello board.
- Creates and shares different templates for emergencies using Word and houses these files within the channel for future reference.
- Sets deadlines, creates tasks, and assigns responsibilities by employing Trello right within Microsoft Teams.

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

- Freehand by InVision empowers collaborating on new ideas to devise an action plan in real-time.
- Trello helps track and communicate tasks and milestones without having to switch applications.
- Office applications like Word help create templates right within Microsoft Teams.

Which app integrations on Teams made it possible?

Trello  Freehand By InVision  Word
Collaborate with your team through channel communications using @mention to tag required personnel and keep conversations around the topic in a single thread. The Director @mentions the Safety and Compliance Manager to drive the discussion on routine safety drills.
Use features like draw, write, sketch, and comment to explore ideas with Freehand by InVision. The Safety and Compliance Manager uses a Freehand by InVision whiteboard to draw up the plan.
Keep conversations, meetings and relevant documents all in one place with Microsoft Teams. The Safety and Compliance Manager provides context to the meeting through channel post and continues to interact with his team on the same thread.
Complete meeting solutions in Teams support screen sharing, recording, video and audio conferencing. Scheduling Assistant feature suggests times that are optimal for all attendees.
Trello lets your team work more collaboratively and get more done. Trello boards, lists, and cards enable you to organize and prioritize your projects in a fun, flexible and rewarding way. The Safety and Compliance Manager uses Trello to manage tasks.
Enjoy powerful document creation and editing with the complete canvas and toolset of Word within Teams. The Safety and Compliance Manager shares drill-related documents using Word.
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.
Tabs can be added to help team members easily access and manage the data they need or interact with the most. The Safety and Compliance Manager pins the schedule and tasks in a Trello tab for everyone’s access.
Managing an On-Site Emergency
Safety Manager

Scenario Walkthrough

At one of the construction sites of an on-going project, an unfortunate incident has put the safety of construction workers at risk. The Safety Manager present on site must take quick actions to manage the mishap. Supported by the organizing and collaborative assistance of Microsoft Teams, she works in partnership with members from multiple departments.

- Informs team members about the incident via channel communication and hosts a meeting to discuss the emergency.
- Arranges to transfer the injured workers to a nearby hospital, marking its location via Places.
- Pins a OneNote tab in the channel containing images of the damage.
- Requests the Operations Associate to shuffle the shifts of unharmed workers.
- Lists down all the expenses incurred in an Excel spreadsheet and gets it approved from the Finance Manager.

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

- Use Places to select, discuss and share locations.
- Manage work timings and shifts of construction staff with Shifts application within Teams.
- Create summaries of crucial data with Office applications like Excel and OneNote.

Which app integrations on Teams made it possible?

Shifts  Places  Excel  OneNote
Dedicated teams and channels enable instant group collaboration. The Safety Manager sends an update in the relevant channel about a wall collapse at a site. She holds a virtual meeting to discuss the emergency.
Location sharing becomes easy within Microsoft Teams with Places. A team associate shares the location of the hospital where the workers have been shifted.
Enjoy 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. As the situation is contained, the team discusses rearranging shifts and expenses incurred in the same thread.
The Safety Manager uses Excel to build and present financial impact analysis data to the leadership. Create impactful summaries of crucial data with Excel, Word and OneNote for Microsoft Teams.
The Shifts app in Microsoft Teams keeps frontline workers connected and in sync. With injured workers requiring time off to recuperate, the Supervisor rearranges the shift schedule with other available workers.
Channel conversations are a great way to communicate updates to team members. The Safety Manager updates the team when the injured workers resume work at the construction site.
Planning Eco-Friendly Renovation
Project Manager

Scenario Walkthrough

Contoso Construction understands the increasing emphasis on creating environmentally sustainable buildings that meet global standards. The Project Manager at a Contoso Construction venture, Collab Valley, collaborates with her team members to convert the entire site into a fully solar powered space.

- Notifies the team of plans to convert Collab Valley into a solar powered facility.
- Schedules a channel meeting to brainstorm ideas for the new sports complex.
- Informs the Electrical Engineer to go ahead with the purchase of solar panels.
- Views and approves a revised mock-up of the sports complex shared on Thinglink.
- Creates and assigns tasks to team members using Trello.
- Notifies and congratulates the team for their good work.

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

- Collaborate with ease and document information through established, protected channel communications.
- Organize and prioritize your projects in a fun, flexible and rewarding way using project management applications within Microsoft Teams.
- Build visual learning experiences with interactive images, videos and 360 media with Thinglink.

Which app integrations on Teams made it possible?

- Thinglink
- Trello
The Project Manager begins a new conversation thread regarding converting an existing building into a solar powered facility. She @mentions the channel to get everyone’s attention and sets up a meeting to take the project forward.
Protected meetings and screen share using Microsoft Teams brings the entire team together for launch planning. Conversations, action items and relevant documents shared in the meeting thread are accessible right inside Teams.
Throughout the project, the Project Manager uses channel conversations to track issues, update stakeholders, stay updated with tasks, deadlines etc. and to communicate with team members to ensure on time execution.
@mention relevant team members to make sure you grab their attention in real-time. The Project Manager uses the feature to get feedback from her leadership.
Create and view interactive images, videos and 360-degree virtual tours in the Microsoft Teams environment using Thinglink. The Project Manager gets a go-ahead from the leadership team after they view the video.
By adding a Trello tab into your Microsoft Teams channel, you can switch to Trello functionality when needed. The Project Manager pins the tasks in a Trello tab for shared access.
As the installation work begins, the Project Manager updates the team and closes out the conversation. Use social features like GIFs and emojis to respond.
Coordinating Disaster Response Preparedness

Director

Scenario Walkthrough

Safety and emergency preparedness are very important protocols in Contoso. Supported by the organizing and collaborative assistance of Microsoft Teams, Contoso runs a multi-faceted simulation to test emergency preparedness of the organization, achieving impressive results.

• Creates a collaborative OneNote tab which lays out a comprehensive plan of what the team needs to do in the event of an earthquake.
• Invites team members and security personnel to edit the plan.
• Freezes the edits and holds a channel meeting to alert department heads.
• Creates a conversation alerting everyone to the upcoming simulation and blocks calendar date for simulation.
• Creates an Emergency Preparedness channel and adds managers to capture their POCs and have their employees sign up for the simulation using a Forms tab.
• Assembles volunteers for the event with Forms and runs simulation successfully.

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

• Broadcast messages to your entire organization using Company Communicator.
• Gather meeting notes in OneNote.
• Everyone on your team is aware of upcoming events with group calendar integration.
• Keep track of volunteer sign ups and many other forms with Forms.

Which app integrations on Teams made it possible?

PDF
OneNote
Company Communicator
Forms
Once the Director adds the OneNote tab to the channel, team members will be able to view and add notes. As it becomes a breeze to share ideas, channel conversations in the context of OneNote tab enables collaboration.
Share PDF files within your team by adding them as a tab for easier access. The Director shares timelines for the simulation exercise in a PDF format.
Quickly disseminate Plan of Action among team members with a OneNote tab in the channel. The familiar, full OneNote experience is available on Microsoft Teams mobile clients as well or on the OneNote mobile app.
The Director uses channel communication to keep her team apprised of the progress of the simulation. Channel conversations and GIFs are a great way to keep your core team engaged for planning and disseminating information.
Use a Forms tab in the channel to record information and keep the information easily accessible for other team members. Volunteer sign-up is made so much more convenient and in-the-moment pinning a form right inside Teams.
Here's more of what you can do with Forms: work with team members to create and edit a form, add an existing form to collect fresh responses, or share the responses you have collected from a form.
Have something to share broadly? Reach your employees where they collaborate! The Company Communicator app arms your Microsoft Teams environment with corporate communication and group broadcast capabilities.
The Director can choose the audience from one or more user groups or channels in Teams to broadcast her message using the app. Messages will be delivered as 1:1 chats or channel conversations.
Rich messages with summary view and detailed information along with in-the-moment actions such as Acknowledge is sent out to the entire organization and their responses tracked to emulate a real-world scenario over Teams.
The Company Communicator custom app has great capabilities to gather analytics on audience engagement as well - track read acknowledgement and view count of likes and responses to each message sent using the app.
Sum up results of collaborative efforts by letting team members know they’ve done well! The Director signs off on the emergency preparedness exercise by sending out a channel communication about the outcome of the drill.
Introducing Weather Resistant Concrete
Project Manager

Scenario Walkthrough

Contoso decides to use a new variety of concrete that would resist the risk of freeze-thaw deterioration. The Project Manager expedites quality review of the new concrete and submits that it will be beneficial for the project, endorsing its adoption. Here’s how Microsoft Teams helps the Project Manager plan and implement a change request.

• Reviews a case study about a new type of concrete through Bing News.
• Shares an RFI for acquiring further details related to the concrete using Word.
• Schedules a meeting to identify and discuss the pros and cons of using the new concrete.
• Shares notes stating pros and cons of the new concrete with reference to the RFI and discussion using Confluence Cloud.
• Refers to the feasibility plan and impact assessment of using the new concrete in comparison with the existing one through Excel.
• Monitors the progress of the assigned tasks though Workstreams.ai set up within the channel.

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

• Word and Excel applications enable sharing and reviewing various documents and reports right within Microsoft Teams.
• Create and manage project documentation.
• Bing News helps keep the team in the loop and engage them with relevant and latest industry practices and trends.
• Workstreams.ai enables data-driven, results-oriented task management and collaboration app for Teams.

Which app integrations on Teams made it possible?

Word Excel Confluence Cloud

Bing News Workstreams.ai
Environment, Health & Safety – Introducing Weather Resistant Concrete

Get the most relevant news on topics you care about using the integrated Bing News application. The Project Manager looks for more information about the concrete, which he further shares with her team through channel communication using the messaging extension feature.

New Durable Concrete!

Hi Research, I’ve recently come across a new type of concrete, Concrete B, which offers more durability and longer lasting resistance to the freeze-thaw cycle. This is perfect for the new project you’re on. Christie Cline! I’ve attached a case study, which show cases the product in action on previous successful projects similar to yours.
Move conversations to other teams and channels as your project progresses. This facilitates communication and discussions with different stakeholders, while hosting all your project related documents and files in a single environment.
Environment, Health & Safety – Introducing Weather Resistant Concrete

Enjoy powerful document creation and editing with Word. Store team documents easily within the Files tab of the channel for quick reference in the future.
Meetings in Teams include audio, video and file sharing. And because they’re online, you'll have a meeting space and won’t need to find a room or projector to share ideas.
Create, organize and discuss work with your team using various collaboration features of Confluence Cloud. The Project Manager uses Confluence Cloud to share the pros and cons of Concrete B with the team.
The Project Manager begins a new conversation thread when she needs a feasibility study done. She @mentions the channel to get everyone’s attention and to find the best person for the job. She gets a quick response, thanks to open-channel communication.
Channels facilitate instant group communication. Team members stay in the know and can share information directly in the conversation thread to accelerate decision-making.
### Present Vs. Future Cost Comparison

**Company Construction 43255**

<table>
<thead>
<tr>
<th>COSTS (Price Per Cubic Yard)</th>
<th>PRODUCT A</th>
<th>PRODUCT B</th>
</tr>
</thead>
<tbody>
<tr>
<td>GENERAL AND ADMINISTRATIVE</td>
<td>Concrete B</td>
<td>Current Concrete</td>
</tr>
<tr>
<td>Material Cost Per Cubic Yard</td>
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<td>$1,500.00</td>
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<tr>
<td>Longevity Diagnostics Testing</td>
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<td>$1,500.00</td>
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<td>Average Estimated Building Longevity (Years)</td>
<td>200 Years</td>
<td>80 Years</td>
</tr>
<tr>
<td>Overall Cost</td>
<td>$3,100.00</td>
<td>$3,000.00</td>
</tr>
</tbody>
</table>

*The Longevity of this product = greater value*

Break down intricate numbers into visually consumable data with Excel. The cost comparison is shared in the channel for peer review.
Teams and channels are where you hold meetings, have conversations and work on files together with team members.
A meeting is set up in the channel to discuss the impact assessment and an invite is sent to relevant team members and decision makers. Scheduling assistant makes it easy to find suitable time for attendees.
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 the Project Manager to review, edit and publish reports.
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 Project Manager uses channel communication to inform the team about the reports she has studied and shares them in the channel.
The Workstreams.ai tab helps the Project Manager break down tasks efficiently and assign stakeholders for each task, without having to leave the Teams app.
Market Research Plan

Scenario Walkthrough

The Contoso Analyst is in the process of creating monthly market research updates for her territory. These updates are what help the sellers make the right pricing decisions and get the sales flowing. She uses Microsoft Teams to collaborate with team members seamlessly to get the job done.

- Studies an article regarding a drilling initiative close to Contoso’s premises through Bing News.
- Refers to a PDF to understand market research timeline for the drilling operation.
- Uses Workstreams.ai to monitor the progress of the assigned tasks.
- Schedules a meeting to discuss the tasks regarding the market research for the drilling operation.
- Creates a Power BI tab to visualize the market forecast.
- Drafts a market research article using Word.

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

- Bing News helps keep the team updated about latest and relevant industry whereabouts and trends.
- Power BI aids in studying market forecasts and trends in a highly visual format.
- Applications like PDF and Word aid quick access to notes, documents and reports.
- Workstreams.ai empowers teams to leverage data-driven, results-oriented task management and collaboration.
- Who helps identify and reach out to staff and other associated people in various roles within the organization.

Which app integrations on Teams made it possible?

<table>
<thead>
<tr>
<th>App</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Workstreams.ai</td>
<td>Data-driven, results-oriented task management and collaboration.</td>
</tr>
<tr>
<td>Power BI</td>
<td>Visualizing market forecasts and trends.</td>
</tr>
<tr>
<td>PDF</td>
<td>Access to documents and reports.</td>
</tr>
<tr>
<td>Word</td>
<td>Access to notes and articles.</td>
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<tr>
<td>Bing News</td>
<td>Updated about latest and relevant industry whereabouts and trends.</td>
</tr>
<tr>
<td>Who</td>
<td>Identify and reach out to staff and other associated people.</td>
</tr>
</tbody>
</table>
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 Analyst uses Bing News to share a relevant article with the team.
The conversations progress to exclusive channels where team members focus on tasks specific to the current lifecycle of the project. Channels provide the much-needed structure to ensure areas of the project keep moving in parallel.
Workstreams.ai within Microsoft Teams enables speedy plan mobilization using task assignment and delegation. The Analyst can organize and track tasks with the Workstreams.ai tab in Microsoft Teams.
Everyone on your team can work seamlessly with PDF files, right within Microsoft Teams. The Analyst views a market research PDF document shared in the channel conversation.
Channel conversations can contain a lot of things – conversations, files shared by team members, and meeting threads. The Analyst sets up a meeting to discuss tasks and continues the thread to communicate in the open channel conversation.
Protected meetings and screen share using Microsoft Teams brings the entire team together for market research discussion. Conversations, action items and relevant documents shared in the meeting thread are accessible right inside Teams.
A Power BI dashboard offers a visually rich view of current and projected data. The Analyst uses Power BI to publish property valuation forecast.
Use channel conversations to relay updates to team members. The team collaborates over the project using open channel communication.
Co-author and edit Word documents within Teams. The Analyst shares the market research report for peer review.
Microsoft Teams conversations are threaded so users can reply directly in-context to specific conversations, while keeping relevant discussions and files grouped together.
Look for employees within your company database based on name, position, or what project they are assigned to using Who in Microsoft Teams. The Analyst uses Who to find the subject matter expert for validation of their work.
When a new member is added to a team, they can immediately access all conversations, information and files that have been shared in the team. The Analyst adds the subject matter expert to the discussion and sets up a meeting.
Microsoft Teams enables transparent communications through channel conversations. The Analyst communicates in open-channel conversations and keeps team members up-to-date.
Channel conversations are also a great place to share snippets of your visual data for team members to understand the discussion points without opening a tab or a file.
Power BI provides business analytics to analyze data and share insights. The Analyst uses integrated Power BI dashboard to illustrate how well the research article has done.
Finance & Legal

These scenarios will illustrate how Teams can help different Finance & Legal roles quickly turn data into actionable insights, automating manual and repetitive processes and driving better decisions through collaboration.

Finance & Legal Superpowers in Teams

Capabilities and Features used...

- Hold remote presentations over protected video conferences
- Participate in instant, open-channel communication
- Store documents within a cloud-enabled repository with Files
- Real-time, contextual file sharing and co-authoring
- Channel Tabs for everyone to stay updated
- Protectively collaborate with teammates on multiple projects from 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 & Legal

Assistant Finance Manager
“I can never run the risk of an adverse audit report. Establishing and adhering to regulatory guidelines keeps us on track.”
- Manage and oversee daily operations of the accounting department
- Monitor accounting data and produce financial reports or statements
- Establish compliant accounting methods, policies and principles

Legal Manager
“The keystone to justice is the belief that the legal system treats all fairly.”
- Prepare legal documents
- Ensure work progresses in accordance with the set laws
- Supervise the team and ensure they follow all legal procedures in a meticulous manner

Financial Analyst
“When I work a game as an analyst, all I do is look at the game like a coach.”
- Provide guidance for making investment decisions
- Assess the performance of company stocks and bonds
- Engage in failure analysis and be a part of the investigation
- Review budget proposals and funding requests
Meet the Business Decision Makers
Finance & Legal

Finance Director
“\textit{If one does not know to which port one is sailing, no wind is favorable.}”

- Direct financial planning and strategy
- Develop and control the company’s annual operating budget to ensure that all financial targets are met, financial and statutory regulations are complied with
- Monitor external contracts and services to ensure that they provide the best value to company

Project Manager
“\textit{Project management is like juggling three balls – time, cost and quality.}”

- Monitor the performance of the team to yield best outputs
- Control time management for all employees and supervise their signing in and signing out
- Create and track performance reports
Partnering with an International Firm to Build Compact Homes
Finance Director

Scenario Walkthrough

An international construction company has approached Contoso to be the design partners for their compact home project. The Finance Director must understand the possible outcome of this partnership to make the right decision. She connects with her team members using Microsoft Teams to understand the company’s requirements, analyze the proposal, and take a decision.

• Creates a team and adds team members from various departments who can help her with the proposal.
• Schedules a team meeting to discuss the proposal and uses OneNote to capture MOM.
• Reviews the company analysis report shared by the Business Development Head through Excel.
• Analyses the international market statistics using a Power BI dashboard with team members to identify future trends.
• Requests the Legal Head to draft an agreement and shares a signed copy of the same using Adobe Sign.
• Announces the new partnership using the Company Communicator application.

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

• Utilize Office tools like OneNote to capture MOM and Excel to compile and review data to build a business case for partnership.
• Study market trends in a highly visual format with Power BI.
• Leverage corporate communication and group broadcast capabilities of the Company Communicator app within Teams.
• Share and execute contracts via Adobe Sign without leaving the Teams interface.

Which app integrations on Teams made it possible?

- OneNote
- Adobe Sign
- Power BI
- Company Communicator
Use channel conversations to relay updates to team members. The Finance Director informs the team about a partnership request and sets up a meeting to discuss the same.
Easily schedule meetings and find the best available times for invitees through the native scheduling calendar. The Finance Director schedules a channel meeting and an invite is sent to meeting participants/ channel members.
OneNote in Microsoft Teams enables collaborative and powerful document creation. Quickly disseminate meeting outcome, notes and action items among team members with OneNote tabs that can be pinned to any channel.
Microsoft Teams enables transparent communications through channel conversations. The Business Development Head updates the team about her findings and pins her analysis in a tab.
Tabs allow team members to access services and content in a dedicated space within a channel or in a chat. The Business Development Head’s Excel analysis spreadsheet is available for the team in a quick-access tab.
Protected meetings and screen share using Microsoft Teams brings the entire team together for project discussion. Conversations, action items and relevant documents shared in the meeting thread are accessible right inside Teams.
Facilitate data-driven decisions informed by visualizations and scoring in Power BI for Microsoft Teams. The Finance Director views the trends in a Power BI dashboard presented by a team associate.
Use Adobe Sign to send, sign, and approve documents. The partnership proposal is sent to the leadership team for e-signature.
Have something to share broadly? Reach your employees where they collaborate! The Company Communicator application arms your Microsoft Teams environment with corporate communication and group broadcast capabilities.
Creating Occupancy Certificates for New Tenants

Legal Manager

Scenario Walkthrough

Contoso has recently completed a project in South Park, Seattle, and it is ready for tenants to move in. Before they do so, the legal team must prepare their occupancy certificates and lease agreements. The Legal Manager shoulders the responsibility and effectively gets the task done using Microsoft Teams.

• Receives a personal chat message from the Sales Manager regarding the status of the project.
• Adds the Sales Manager in a relevant team and requests her to share customer data in Excel.
• Assigns tasks to two of her team members and monitors their progress using Asana.
• Reviews and approves a copy of the Occupancy Certificate document shared by her associates.

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

• Store team documents easily within relevant channels.
• Remotely monitor tasks assigned to team members using Asana within Microsoft Teams.
• Swiftly share and discuss issues with team members via personal 1:1 chat.

Which app integrations on Teams made it possible?

Word  Excel  Asana
Use a one-on-one chat or a group chat for conversations that don’t require the entire team. The Sales Manager reaches out to the Legal Manager to help with occupancy certificates for tenants.
@mention a person, channel or team to make sure your message reaches the relevant personnel. The Legal Manager alerts the team about the Sales Manager’s requirement.
Break down intricate numbers into visually consumable data with Excel. The Sales Manager shares the tenants’ list using Excel in the channel.
Teams users can add Asana projects to channels and start turning conversations into actionable work—all in one place. The Legal Manager assigns tasks to her team using Asana.
Integrate your team collaboration platform and your project management software with this integration. The Legal Manager monitors task progress using an Asana tab set up 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.
Co-author and edit Word documents within Teams. A team associate shares a copy of the lease agreement in the channel to be shared with tenants.
Updating Property Rates as per the New Government Policy
Finance Director

Scenario Walkthrough

When the government announces changes to the existing real estate policies, Contoso’s leadership team must analyze it’s effects, examine and amend their existing property rates in order to stay competitive in the market. This is how Teams allows the Finance Director to collaborate with peers, assign tasks, and monitor them remotely.

• Informs team members about the new policy through a channel post.
• Schedules a meeting with the team for assessment of the new policy and uses OneNote to document MOM.
• Uses monday.com to break down and assign tasks to team members.
• Studies past industry trends presented with a Power BI dashboard.
• Reviews the predictive analysis of changes in property rates shared using Excel.

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

• Harness the power of applications like Excel and OneNote within Teams to document necessary information.
• Leverage rich project management features within Teams with monday.com.
• Utilize Power BI to compile and review market trends in a highly visual format.

Which app integrations on Teams made it possible?

- OneNote
- monday.com
- Power BI
- Excel
Use a dedicated team to prepare and collaborate on a plan of action. The Finance Director uses an exclusive channel to kickstart discussion over the new real estate policy.
She receives a meeting invite to take discussions forward. With Microsoft Teams, you can easily schedule meetings and find the best available times for invitees through the native scheduling calendar.
Finance & Legal – Updating Property Rates as per the New Government Policy

Enjoy collaborative and powerful document creation with OneNote in Microsoft Teams. Quickly disseminate meeting outcome and notes among team members with OneNote tabs in channels.
Tab conversations enable the team to discuss tasks and engage in rich conversations over tab content without ever losing context.
monday.com makes it easy for your team to create new plans, organize and assign tasks, chat about what you're working on, and get updates on progress.
Microsoft Teams conversations are threaded so users can reply directly in-context to specific conversations. The team associates share their work for peer review and keep the conversation focused.
A Power BI dashboard offers a visually rich view of current and projected data. The Finance Director views market rates analysis using a Power BI dashboard.
Keep conversations and relevant documents all in one place with Microsoft Teams. The team continues to share their work in the same thread for a seamless collaborative effort.
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.
Analyzing Margins to Absorb Unforeseen Costs

Financial Analyst

Scenario Walkthrough

To maximize profits, Contoso Construction gears up to analyze the challenge posed by increasing input costs. Contoso targets to improve bid pricing to avoid any unforeseen delay on projects. The Financial Analyst takes on the responsibility of reviewing past projects and improve the current bid pricing strategy for future contracts.

- Leverages the Bing News messaging extension to post news related to increasing costs in the construction sector.
- Uses Excel to share critical data on year-wise comparison of material prices.
- Creates a Word document to share examples of different approaches to bid pricing.
- Employs a PowerPoint to recommend bid pricing solutions to maintain positive margins.

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

- Bing News messaging extension helps keep the team in the loop and engage them with important stories.
- Excel and Word applications enable sharing important data within Microsoft Teams.
- PowerPoint helps draft an effective and easily consumable presentation on a proposed analysis.

Which app integrations on Teams made it possible?

Word  Excel  PowerPoint  Bing News
Get the most relevant news on topics you care about with Bing News. A report about material pricing volatility sets off a discussion in the leadership team and the Financial Analyst must now provide her insight.
Collaborate with your team through channel communications using @mention to tag required personnel and keep conversations around the topic in a single thread. The Financial Analyst shares her findings in a tab for the team’s reference and @mentions a leadership associate.
The Financial Analyst uses Excel in Teams to create an input cost analysis and sets it up as a tab in the channel for peer review. The spreadsheet is pinned as a tab to enable quick access.
Microsoft Teams conversations are threaded so users can reply directly in-context to specific conversations, while keeping relevant discussions and files grouped together. The Financial Analyst presents her recommendations in a PowerPoint presentation.
Microsoft Teams makes it easy to share files within channels. Your colleagues can view, edit and collaborate on the PowerPoint files right within Teams, thanks to deeply integrated Office 365 services.
Scenario Walkthrough

When Contoso embarks on a multi-site development project for their client, Microsoft Teams helps the Project Manager define measures and track progress for each project milestone to maximize transparency and minimize discrepancies.

- Studies the Statement of Work (SOW) containing the project milestones using Word.
- Creates a Smartsheet for team members to have clear visibility of the project.
- Refers to a PDF to view real-time project status with pictures from the sites.
- Records her notes and adds pictures to OneNote for reference.

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

- Smartsheet helps create and track, tasks, and milestones right within Microsoft Teams.
- Applications like OneNote and PDF enable quick access to notes, documents and reports.
- Integrated Microsoft applications like Word enable powerful documentation.

Which app integrations on Teams made it possible?

- PDF
- Word
- OneNote
- Smartsheet
A team brings together a group of people for work, projects, or common interests. The Project Manager uses a dedicated team to prepare and collaborate over milestone reports.
She collaborates with the project management team and shares the SOW document within the channel conversation. The SOW is a Word document containing the project details for team members. This provides shared context to the entire team.
Everyone on your team can work seamlessly with PDF files, right inside Microsoft Teams. A team associate shares site pictures using PDF in the channel.
With the integrated Smartsheet, users can add Smartsheet sheets, dashboards, and reports as 'Tabs' within a channel. The Project Manager shares this tab with the team for clear visibility of the project.
When a custom tab is added to a channel, a tab conversation is created that allows team members to have focused discussions about the content.
Meetings can either be scheduled or triggered instantly (using Meet Now). The Project Manager gets on a call with an associate to understand issues faced at the construction site.
Add a OneNote tab to your channel in Microsoft Teams and use it as a shared space for notes among team members. The Associate uses it to create and save notes and upload photographs while tracking project milestones.
Close out conversations in channels once your project objectives have been achieved. The files shared during the discussions will stay hosted within the channel.
Sourcing & Procurement

These scenarios will illustrate how Teams can help various members of the Sourcing & Procurement team communicate effectively to ensure timely decisions and positive business outcomes.

Sourcing & Procurement Superpowers in Teams

Capabilities and features used...

- Participate in instant, open-channel communication
- Store documents within a cloud-enabled repository with Files
- Real-time, contextual file sharing and co-authoring
- Channel Tabs for everyone to stay on up-to-date
- Protectively collaborate with teammates on multiple projects from a single platform

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
Sourcing & Procurement

Procurement Manager
“My job is to understand what we are buying, and why, how it will affect the business, and what the potential risks are.”

- Manage overall direction, coordination, and evaluation of procurement for the company
- Perform all procurement and contracting activities including pre-qualification, tender management, negotiation and preparation of contracts

Real Estate Broker
“To be successful in real estate, you must always and consistently put your clients' best interests first.”

- Co-ordinate client communications
- Identify and select ideal locations for the client
- Navigate the purchase process from land identification to purchase
Supplier Performance Analysis
Procurement Manager

Scenario Walkthrough

Contoso is planning a detailed supplier evaluation to ensure smooth execution of projects. Being a leading player in the construction sector, Contoso strives to avoid risks of delay and cost overrun of projects. The Procurement Manager takes charge to perform a supplier analysis by collaborating with team members on Microsoft Teams.

- Engages in team discussion when Director @mentions the Procurement Manager in the channel conversation.
- Schedules a meeting with team members to discuss the supplier analysis action plan.
- Creates and shares analysis on supplier segmentation and refers to the data shared by Financial Analyst using Excel.
- Shares the criteria for evaluation with the entire team using OneNote.
- Shares the final analysis report with team members using Smartsheet.

How did Teams help Procurement Manager execute his roles and responsibilities?

- Protected meetings using Microsoft Teams keep team members on the same page.
- Effective channel communication with @mention feature for quick updates.
- OneNote allows shared access to important documents and notes for future reference.
- Smartsheet offers a tabular user interface to use formulas in templates right within Microsoft Teams.

Which app integrations on Teams made it possible?

- Excel
- Smartsheet
- OneNote
The Director seeks the cost benefit analysis, roping in relevant team members to help with budget planning. He uses the @mention feature to call their attention to his post, which also sends out a notification in their Activity Feed.
The Procurement Manager shares his analysis and schedules a meeting to discuss the same with his team.
Complete meeting solutions in Teams support screen sharing, recording, video and audio conferencing. Scheduling Assistant feature suggests times that are optimal for all attendees.
The Procurement Manager uses Excel to build and present data to the team. Create impactful summaries of crucial data with Excel, Word and OneNote for Microsoft Teams.
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.
OneNote enables collaborative and powerful document creation within Microsoft Teams. The Project Manager shares evaluation criteria in a OneNote tab pinned in the channel.
Keep conversations and relevant documents all in one place with Microsoft Teams. A team associate shares the list of suppliers in the channel.
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.
As the team completes its analysis, the Procurement Manager shares the final results in the channel. The documents shared during the conversation will remain stored in a cloud-enabled repository for future reference.
With the Smartsheet for Microsoft Teams integration enabled, users can add Smartsheet sheets, dashboards, and reports as ‘Tabs’ within a channel.
Procuring a New Piece of Land
Procurement Manager

Scenario Walkthrough

Contoso Realty wants to expand its operations in Seattle. They are in the process of identifying lucrative portions of land to acquire for their new housing project. The procurement team in association with the Legal team uses Microsoft Teams to initiate and complete the process.

- Responds to the Director via 1:1 chat about identifying and purchasing a development site for a new housing project in Seattle.
- Notifies the team of the new project and schedules a channel meeting to discuss the way forward.
- Creates a task board to assign tasks and track the team’s progress using Wrike.
- Liaises with the Legal Analyst over chat and channel conversation to close out the paperwork and permissions required for the purchase.
- Closes out the land acquisition using Adobe Sign and updates the team of the commencement of construction.

How did the Procurement Manager leverage Microsoft Teams to execute his roles and responsibilities?

- Communicate, document and collaborate through established and exclusive channels.
- Share and execute contracts via Adobe Sign without leaving the Teams interface.
- Get more work done across multiple projects and multiple teams with Wrike.
- Share locations and zip codes using the integrated Places application.

Which app integrations on Teams made it possible?

- Places
- Wrike
- Adobe Sign
Use a one-on-one chat or a group chat for conversations that don’t require the entire team. The Director informs the Procurement Manager about a new housing project approval and requests him to commence the process for land purchase.
Sourcing & Procurement – Procuring a New Piece of Land

Channel conversations enable teams to discuss new projects and collaborate over chat, meetings and tabs. Here the Procurement Manager schedules a channel meeting to discuss the new housing project.
Meetings in Teams include audio, video and file sharing. And because they’re online, you’ll always have a meeting space and never need to find a room or projector to share ideas.
The Procurement Manager assigns and tracks tasks with a Wrike tab in the channel. This provides clarity to the team members regarding the tasks they need to pick up and close out.
Location sharing becomes easy within Microsoft Teams with Places. A team associate shares two locations she finds are for sale and could be ideal for the project.
The Procurement Manager begins a new conversation thread when he needs the legal approvals. He @mentions the channel and gets a quick response, thanks to open-channel communication.
Prepare and send documents for sign-off and track their status quickly and easily, right within Microsoft Teams. The Director is sent the purchase document and he signs off on the same using Adobe Sign.
Channel conversations can be fun with social features like GIFs and emojis. As the Director announces successful completion of the task and appreciates the effort, the team members respond with GIFs.
Identifying and Procuring Sustainable Building Material

Procurement Manager

Scenario Walkthrough

Contoso’s latest venture is a green residential project that requires the developer to use sustainable material for construction. Before they make the purchase, the procurement team must identify certified materials with the lowest environmental impact on its production and life cycle. See how Microsoft Teams enables the Procurement Head execute his responsibilities.

- Schedules a team meeting to share and discuss information around sustainable material with team members.
- Pins a Freehand by InVision whiteboard in the channel containing ideas brainstormed during the meeting.
- Examines the life cycle and industry usage of several green building material with a Power BI dashboard.
- Shares a Word document containing reliable procurement practices that they should incorporate in their process.
- Shares shortlisted material in a channel post and creates an Asana board to assign and monitor further tasks.

How did Team help the Procurement Manager execute his roles and responsibilities?

- Study market trends in a highly visual format with Power BI.
- Collaborate, ideate and draft solutions with team members in real-time by using Freehand by InVision.
- Utilize Office applications like Word within Teams to document and share necessary information with team members.
- Leverage powerful task management features to turn conversations into action items with Asana in Teams.

Which app integrations on Teams made it possible?

- Freehand By InVision
- Word
- Asana
- Power BI
Teams and channels are where you hold meetings, have conversations and work on files together with team members. The Procurement Manager schedules a meeting to discuss sourcing sustainable building material.
With Microsoft Teams, the Procurement Manager can schedule meetings without difficulty and find the best available times for invitees through the native scheduling calendar.
Sourcing & Procurement – Identifying and Procuring Sustainable Building Material

Collaborate, ideate and draft solutions on an infinite white boarding space with Freehand by InVision in Teams. A team associate pins the board, where the ideas have been collated, as a tab.
When a custom tab is added to a channel, a tab conversation is created that allows team members to have focused discussions about the content.
A Power BI dashboard offers a visually rich view of current and projected data. The Procurement Manager views market research data within the tab.
Microsoft Teams makes it easy to share files within channels. If the files are Word, Excel, or PowerPoint files, your colleagues can even view, edit and collaborate on the files right within Teams, thanks to deeply integrated Office 365 services.
Use Asana’s integration with Microsoft Teams to add Asana projects to group chats and turn conversations into actionable work, all in one place.
Reliable Best Practices for Real Estate Procurement

Procurement is somehow still the red-headed stepchild of the real estate process. While real estate owners and operators have modernized their leasing, fundraising, and marketing strategies with technologies like VTS, Sightracker, Fundrise, and Flooriday, they are just beginning to address inefficiencies in the vendor management and bid management processes.

There are steps you or your organization can take to move from unsystematic and cumbersome to scalable and replicable. Read on for five most impactful things you can do to streamline your procurement process.

#1: Automate your bid leveling workflow

There is light at the end of the tunnel, and it’s powered by modern technology. An automated bid leveling tool can manage the administrative work of aggregating, organizing and, to some degree, analyzing data input by vendors.

With an automated bid leveling tool, your cost-savings goals will align with the limited capacity that your team has to manage the process.

You will want:
- The ability to create and save custom bid leveling templates.
- A ‘smart’ system that highlights deviations across bid entries.

#2: Consistently triple bid your projects

Competitive bidding will push your vendors to be diligent with their quotes, negotiate better costs with their suppliers, and continuously modernize their operations to be as efficient as possible. The goal isn’t to squeeze vendors for the lowest price but to reinforce diligence.

Regularly inviting new-to-you vendors will also deepen your bid list so you’re never caught without a supplier. A ‘smart’ system to manage these vendors.

Co-author and edit Word documents within Teams. The latest version is always accessible to any member of the team as all files are stored in the team’s SharePoint site.
Sourcing New Office Space for Tenant
Real Estate Broker

Scenario Walkthrough

A major service that Contoso provides is the tenant representation process, which involves intense collaboration and communication. With the efficiency of Microsoft Teams, Contoso represents Northwind in finding and securing a new office space location, allowing collaboration between multiple personnel while meeting client requirements.

- Uses OneNote to take down notes related to the requirements discussed during the meeting.
- Creates a checklist mentioning the points to be considered while looking for a new space using Word.
- Prepares a service contract by employing a PDF tab within the channel.
- Compiles a list of potential properties using Excel.
- Uses Places to share the precise location of the potential properties.

How did Teams help the Real Estate Broker execute her roles and responsibilities?

- Utilize Office tools like Word and Excel to share crucial information and lists with team members.
- Gather meeting notes and MOMs using OneNote.
- Use applications like PDF for quick access to documents, reports and contracts.
- Employ Places to identify and share locations.

Which app integrations on Teams made it possible?

Word Excel OneNote PDF Places
Sourcing & Procurement – Sourcing New Office Space for Tenant

The Real Estate Broker uses a dedicated team to prepare and collaborate on a plan of action to find a new office space for their tenant. A team can even include external members through protected guest access.
Record meeting notes or observations in OneNote within Teams and share them when needed with the team for their consumption. The Real Estate Broker shares the tenant requirements through a OneNote tab.
Co-author and edit Word documents within Teams. The checklist for tenant requirements is shared with team members in the channel.
A meeting is set up in the channel to flesh out the requirements and a meeting invite is sent to relevant team members.
Northwind Requirement Gathering

The following checklist is designed for the new office space search. The space is aimed to accommodate the increasing growth of their workforce.

- Catered towards the innovation and asks of Northwind as they expand as an organization

QUESTIONS FOR NORTHWIND:

- What size space are you looking for (especially with expansion)?
  - Large but not so big that it affects communication.
- What’s the budget range?
- Look at Northwind Budget sheets
- What are must-have features?
  - We will leave that open to the innovators, we just ask for a large open space with a collaborative vibe.
- What type of work is being performed on a daily basis (short summary)?
  - Collaborative, often requires large teams
- Open space?
  - Yes, Definitely!
- Shared space?
- Yes
- Key functionality to the office
  - Collaboration
  - Culture fit

THINGS TO CONSIDER:

- Hosting clients in the office space, what does the office need to show?
- Conference rooms? Phone booths?
- Lighting and Atmosphere

Enjoy powerful document creation and editing with Word. The decision makers add their responses to the checklist and share it in the channel.
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!
Make it perfectly simple to sign documents, contracts, and forms — virtually anytime, anywhere. The new contract is signed using the deep integration of Adobe Sign.
@mention a person, channel or team to make sure your message reaches the relevant personnel. The Procurement Manager requests a team associate to find properties that suit the tenant requirements.
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 potential properties to the team. Create impactful summaries of crucial data with Excel, Word and OneNote for Microsoft Teams.
As the team zeroes in on properties, a team associate @mentions the relevant decision makers 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.
Move conversations to other teams and channels as your project progresses. This facilitates communication and discussions with different stakeholders, while hosting all your project related documents and files in a single environment.
Prepare and send documents for sign-off and track their status quickly and easily, right in Microsoft Teams. The final proposal, signed by the tenant, is shared using Adobe Sign.
Maintenance & Property Management

These scenarios will illustrate how Teams can help various members of the Maintenance & Property Management team communicate effectively to ensure timely decisions and positive business outcomes.

Maintenance & Property Management Superpowers in Teams

Capabilities and features used...

- Participate in instant, open-channel communication
- Store documents within a cloud-enabled repository with Files
- Real-time, contextual file sharing and co-authoring
- Channel Tabs for everyone to stay on up-to-date
- Protectively collaborate with teammates on multiple projects from a single platform

Apps that enable an immersive experience in Teams

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

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Meet the Business Decision Maker

Maintenance & Property Management

Building Manager

“Behind every great property manager is a substantial amount of tolerance.”

• Maintain a safe environment with proper lighting, signage, and disability access
• Draft and update emergency plans and evacuation procedures
• Oversee security, fire prevention, and other safety systems
• Schedule regular building maintenance and janitorial services
Planning Annual Maintenance for a Residential Property

Building Manager

Scenario Walkthrough

Contoso is ready for the annual maintenance of one of its properties. This involves fixing deficiencies, performing repairs, and managing tenants’ concerns for all the units in the building. To make maintenance planning successful, the Property Manager collaborates with various teams and co-workers using Microsoft Teams.

- Uses Smartsheet to share the property maintenance checklist with team members.
- Uses Excel to share data on maintenance requests and to view the revised work order shared by the Facility Analyst.
- Schedules a meeting with team members to discuss the budget and procurement of materials.
- Views OneNote pinned in the channel to understand the allocated budget for the annual maintenance activity.

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

- Smartsheet helps create and track tasks and milestones right within Microsoft Teams.
- Excel enables sharing critical requests’ data, requisite formats and customized templates for quick reference.
- OneNote application allows quick and easy reference to budget details in the channel.
- Live captions with speaker attribution in Teams makes meetings more accessible and inclusive.

Which app integrations on Teams made it possible?

Excel  
Smartsheet  
OneNote
The Building Manager uses an exclusive channel to start planning for annual maintenance. She shares a list of requests in the channel for everyone's reference.
The Building Manager uses Excel in Teams to create a list of maintenance requests and uploads it in the channel for the team’s reference.
Keep conversations and relevant documents all in one place with Microsoft Teams. The Building Manager provides context to her requirement by sharing relevant files and continues to interact with her team on the same thread.
No more attaching spreadsheets to emails. Build them using the integrated Smartsheet application and share them with the team. The Building Manager uses Smartsheet to share the maintenance checklist.
Collaborate with your team through channel communications using @mention to tag required personnel or a team and keep conversations around the topic in a single 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.
Interact with team members virtually anywhere, anytime and schedule meets with ease through the native scheduling calendar. Meeting threads in channels allow conversations before and after the meeting.
Meeting attendees can leverage a wide range of features like live captions, background effects, meeting recordings and more for an engaging and productive meeting experience. The Building Manager turns on live captions during the meeting.
Teams can detect what's said in a meeting and present real-time captions. When enabled, the live captions will include speaker attribution—so you'll see not only what's being said, but who's saying it.
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!
OneNote in Microsoft Teams enables collaborative and powerful document creation. The Building Manager views the budget allocation for maintenance through a OneNote tab set up in the channel.
Managing Tenant Complaints

Building Manager

Scenario Walkthrough

The Building Manager at a Contoso Realty housing site receives a complaint about bug infestation in one of the houses. She quickly communicates the issue to the team and coordinates with them to resolve the issue and make sure that Contoso's high health and safety standards are met with.

- Receives a customer complaint ticket on Freshdesk.
- Notifies the team of the issue and initiates action with the Maintenance Supervisor through the dedicated channel.
- Requests the Safety Inspector to conduct a site-wide inspection and assigns tasks using Trello.
- Coordinates efforts to implement preventive measures across all houses in the site.
- Uses the Praise application to commend the efforts of the team post receiving no bug infestation complaints.

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

- @mention feature in chat and channel conversation helps catch team members’ attention instantly.
- Stay on top of your customer support tickets right inside Microsoft Teams with Freshdesk.
- Organize and prioritize your projects in a fun, flexible and rewarding way with Trello.
- Appreciate efforts undertaken by team members using Praise.
- Update or keep track of important lists with SharePoint lists.

Which app integrations on Teams made it possible?

Freshdesk  Praise  Trello  SharePoint
With the Freshdesk-Microsoft Teams integration, you’ll receive instant notifications on Teams whenever there’s an update on the tickets assigned to you in Freshdesk. The Building Manager receives a ticket about a bug infestation.
The Building Manager alerts the team, roping in relevant team members to help with budget planning. She uses the @mention feature to call their attention to her post, which also sends out a notification in their Activity Feed.
Create new cards, monitor the activity on the board, and manage and move cards using the deeply integrated Trello application on Microsoft Teams. The Building Manager uses Trello to assign and manage tasks.
Use channel conversations to relay updates to team members. The team keeps the Building Manager in the loop by providing quick updates in the channel.
A list in SharePoint is a collection of data that gives you and your co-workers a flexible way to organize information. The Building Manager views the bug infested houses’ list in SharePoint.
Close out conversations in channels once your project objectives have been achieved. The files shared during the discussions will stay hosted within the Files tab in the channel.
Amending the Rent of Existing Tenants

Building Manager

Scenario Walkthrough

One of the Building Managers at Contoso Realty has received a new annual maintenance budget for her properties, which lacks funds for unforeseen events. To ensure she has enough emergency funds, she decides to adjust the rent of existing tenants. Here’s how Microsoft Teams helps her collaborate with team members and perform her duties.

- Reviews the annual budget for property maintenance shared by the Finance Manager using Excel.
- Engages in 1:1 chat conversation with the Finance Manager to seek clarifications.
- Identifies gaps and schedules a meeting to discuss them with team members.
- Navigates through SharePoint lists to evaluate rent of the existing tenants.
- Modifies present rates and shares the updated spreadsheet with the Facility Director for approval.

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

- Utilize Excel to create and share crucial data with team members.
- Update or keep track important lists with SharePoint lists.
- Hold protected meetings with team members to expedite decision-making.

Which app integrations on Teams made it possible?

- Praise
- Excel
- SharePoint
Microsoft Teams enables transparent communications through channel conversations. The Building Manager reviews the annual maintenance budget and voices her concerns.
Tabs allow team members to access services and content in a dedicated space within a channel or in a chat. The annual maintenance budget, shared in Excel, is pinned as a tab for everyone’s easy access.
Use a one-on-one chat or a group chat for conversations that don’t require the entire team. The Building Manager reaches out to her team associate and shares her concerns.
Use a dedicated team to prepare and collaborate on a plan of action. The Building Manager kicks off a discussion in the team over the new budget and schedules a meeting.
Plan meetings or keep them impromptu, according to team members’ availability, which reflects in the native scheduling calendar. Hold protected calls and conferences and share screens with enhanced security.
Create SharePoint lists to keep track of information, including titles, descriptions, people and dates. The Building Manager shares the list of tenants and the revised rent using SharePoint.
The Building Manager uses Excel in Teams to create break-even analysis and uploads it to the Files tab in the channel for peer review. The spreadsheet can be pinned as a tab for quick access, while any edits to the file can be carried out with ease.
Create impactful summaries of crucial data with Excel, Word and OneNote for Microsoft Teams. The Building Manager presents a visual summary of the increase in rent using Excel.
With Praise in Teams, share badges to celebrate every success, communicate your appreciation with your team members, and foster greater comradery. The Director appreciates efforts put in by the Building Manager and her associate.
Conducting Emergency Repairs
Building Manager

Scenario Walkthrough

An unexpected heavy snowfall has blocked the driveways of the buildings and has left water pipes frozen at a property managed by Contoso. The tenants have sounded an alert, and Contoso’s property maintenance team must make arrangements to control the situation. The Building Manager uses Microsoft Teams to collaborate and determine the course of action.

- Schedules a meeting to highlight the situation and presents her screen to share site images with the team members.
- Views the list of emergency repairs required using Zendesk right within Microsoft Teams.
- Shares information about weather to plan repairs using Bing News.
- Refers to the shift schedule of snow clearing team shared by the Maintenance Supervisor using Shifts application right within Microsoft Teams.
- Shares the location of the repair site with Places application.
- Pins the template of service completion notes for team members using Word.

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

- Get the most relevant news and information on the topics that matter right within Microsoft Teams with Bing News.
- Shifts application enables team members to stay connected and manage their staffing schedules.
- Places integration allows the sharing of site locations and zip codes without switching applications.
- Word in Microsoft Teams allows creating templates and documents for quick access and easy edits.

Which app integrations on Teams made it possible?

- Bing News
- Shifts
- Zendesk
- Word
- Places
The Building Manager begins a new conversation thread when she needs the team to work on the tenants’ requests. She @mentions the channel to get everyone’s attention and to find the best person for the job. She gets a quick response, thanks to open-channel communication.
With Zendesk in Microsoft Teams, teams can collaborate to resolve customer problems in real time. The integration allows users to have read-access to their support ticket views inside Microsoft Teams.
1:1 chat conversations can always turn into a call, according to the participants’ convenience. The Building Manager and the Maintenance Supervisor opt for a call to troubleshoot the issue.
Stay up-to-date on current events courtesy of Bing News. The Building Manager shares a news update over snowfall and seeks status of the snow clearing team from the Maintenance Supervisor.
Managers create, update, and manage shift schedules for team members using the integrated Shifts application. The Building Manager refers to the shifts schedule shared by the Maintenance Supervisor.
Location sharing becomes easy within Microsoft Teams with Places. As the Maintenance Supervisor schedules clean up activity, the Building Manager shares the location using Places.
Tabs can be added to help users easily access and manage the data they need or interact with the most. The Building Manager shares a template for clean up notes in a tab.
Enjoy powerful document creation and editing with the complete canvas and toolset of Word right inside Teams. The team needs to fill out the clean up notes document after the work is done.
Share what you see in channels! The Maintenance Supervisor shares images from the site for the Building Manager’s reference to hasten the decision-making process.
The Building Manager is happy with the job well done, and so is the leadership team. The Maintenance Supervisor shares images after the work is done and fills up the clean up notes as required.
Provisioning Event Venue for a Client

Building Manager

Scenario Walkthrough

Contoso’s tenants have the option of renting out building spaces for special occasions. Effective coordination between the Building Manager, Security Manager, the Custodial Manager and the Administrative Assistant helps a tenant book a banquet venue and choose catering options without a hitch.

- Shares a form with the Administrative Assistant to book the banquet space using Forms.
- Engages in 1:1 chat conversation with the Administrative Assistant to seek clarifications.
- Shares a security quote for the banquet booking using Word.
- Shares a list of available catering options using PowerPoint.
- Assigns related tasks to the respective team members using MeisterTask.
- Coordinates for the signing of the invoice using Adobe Sign.

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

- PowerPoint helps in sharing concise presentations with team members.
- Office application like Word helps create templates right within Microsoft Teams.
- Forms helps collect clear requirements from the Administrative Assistant.
- Leverage intuitive features for effective task management with MeisterTask.
- Adobe Sign enables sharing and executing contracts without leaving the Teams interface.

Which app integrations on Teams made it possible?

- Word
- MeisterTask
- Adobe Sign
- Forms
- PowerPoint
Use a one-on-one chat or a private group chat for conversations that don’t require the entire team. The tenant reaches out to the Building Manager to book a banquet hall and other services.
1:1 chat can always turn into a call. The Building Manager gets on a call with the Administrative Assistant to understand the tenant’s requirements.
Integrated Forms application within Teams helps the Building Manager systematically gather the tenant’s requirements.
The tenant is presented catering options in a PowerPoint deck. Sharing Word, Excel or PowerPoint files is easy thanks to integrated Office 365 services.
The Building Manager requests the tenant to fill the form and tracks the task with a MeisterTask ticket in the channel.
Move conversations to other teams and channels as your project progresses. This facilitates communication and discussions with different stakeholders. The Building Manager requests the Security Manager to provide a quote after the tenant fills out the booking request form.
Enjoy powerful document creation and editing with Word. The Building Manager gets the security quote and shares it with the tenant.

<table>
<thead>
<tr>
<th>Security Quote</th>
<th>QTY</th>
<th>DESCRIPTION</th>
<th>UNIT PRICE</th>
<th>LINE TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>8 Security Guards</td>
<td></td>
<td>Prior to event start</td>
<td>$50</td>
<td>$400</td>
</tr>
<tr>
<td></td>
<td></td>
<td>All guests are armed</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Search quests when they enter</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Make sure everyone is on the guest list</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Quotation prepared by: [Name]  
To accept this quotation, sign here and return:  

THANK YOU FOR YOUR BUSINESS!
The Building Manager then reaches out to the Custodial Manager through a 1:1 chat for his quote. Take conversations offline from channels for 1:1 discussions.
Enjoy document collaboration, creation and editing with the full canvas and toolset of Word in Microsoft Teams. The final invoice is presented as a Word document.
The Building Manager uses MeisterTask to track tasks, view assignments, status and manage workflows without leaving the Teams application.
Keep document-signing workflows moving fast when you add Adobe Sign to Teams. The Building Manager sends the final invoice to the Security Manager for his sign-off.
Information Technology

These scenarios will illustrate how Teams can help the IT team communicate effectively to ensure positive business outcomes.

Information Technology Superpowers in Teams

Capabilities and Features used...

- Participate in instant, open-channel communication
- Store documents within a cloud-enabled repository with Files
- Real-time, contextual file sharing and co-authoring
- Channel Tabs for everyone to stay on the same page
- Protectively collaborate with teammates using familiar applications all in a single place

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

Engineering Manager
“The problem in this business isn’t to keep people from stealing your ideas; it’s making them steal your ideas!”

• Direct, review and approve technology design and changes
• Coordinate projects with detailed plans to accomplish goals
• Direct the integration of technical activities
• Plan and direct the build, testing and operation of the product

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

• Administer IT and computer systems for a smooth operation
• Complete system installs and upgrades
• Manage network security
• Oversee data storage and retrieval systems
Integrating New Technology to Improve Customer Experience
IT Manager

Scenario Walkthrough

Contoso Realty aims to grow its business through a more immersive and sophisticated experience for its potential customers. The Project Director approaches the IT Manager to help with new technology integration. The Contoso IT team comes together for this task and the IT Manager spearheads the project using Microsoft Teams.

- Refers to a PDF document in the Files tab to analyze trends influencing the real estate sector.
- Creates a new channel and schedules a meeting to brainstorm implementation of new technologies to improve customer experience.
- Collates and shares minutes of the meeting and impact of the new application on business using OneNote.
- Refers to cost analysis for integrating the software using Excel.

How did Teams help the IT Manager execute her roles and responsibilities?
- Protected meetings to keep team members informed and aligned about project goals.
- Applications like OneNote and PDF for quick access to notes, documents and reports.
- Excel to compile and review critical data on cost analysis with team members.

Which app integrations on Teams made it possible?
- Excel
- PDF
- OneNote
Collaborate with your team through channel communications using @mention to tag required personnel and keep conversations around the topic in a single thread. The Director @mentions the IT Manager and requests her to take up project embedding AR-VR technologies into business operations.
Use the power of Adobe integration with Microsoft Teams. The Director shares a PDF discussing VR-AR trends in the real estate industry.
The conversations progress to exclusive channels where team members focus on tasks specific to the project. Channels provide the much-needed structure to ensure areas of the project keep moving in parallel.
Complete meeting solutions in Teams support screen sharing, recording, video and audio conferencing. The team gets on a call to discuss the project.
Quickly disseminate meeting outcome and notes among team members with OneNote tabs in channels. The OneNote link is shared in the meeting thread.
Channel conversations are a great way to track the status of a project as they can contain everything related to the project: discussion threads, files, and meeting notes. The IT Manager seeks budget approval for the new software implementation.
The IT Manager closes out the conversation after announcing that the budget approvals are in place. The files, documents submitted during the conversation remain stored in the cloud-enabled repository.
The Finance Manager uses Excel in Teams to create the cost analysis and uploads it to a tab in the channel for peer review.
Scenario Walkthrough

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

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

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

- Create inventory list quickly using Excel right inside Teams.
- Track replacement process with a shared spreadsheet in channels.
- Channel conversations help share updates in real-time with relevant members.
- Tasks by Planner and To Do makes it easy to create, assign and track the progress on tasks.
Use channel conversations to relay updates to team members. The IT Manager posts a quick update for team members regarding new devices that they are expecting.
The IT Manager submits the inventory list 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 offline from channels for 1:1 discussion. A team member has requested a monitor, which the IT Manager confirms to her is on its way.
Assign, track and communicate tasks and milestones without having to switch apps using Tasks by Planner and To Do inside Teams. The Tasks by Planner and To Do app helps the IT Manager track and close tasks related to the disbursement of devices.
Creating a New Portal for Occupancy Management
Engineering Manager

Scenario Walkthrough

Contoso wants to build a new portal to help make occupancy management simpler and more efficient. The Engineering Manager collaborates with the development team and the Building Manager to ideate and build a simple and powerful occupancy management portal. He uses Microsoft Teams to manage, track and seamlessly coordinate between different team members to navigate the creation of this portal.

• Schedules a channel meeting with the development team and the Building Manager to brainstorm ideas for the portal.
• Views a list of requirements for the portal shared by the Building Manager in Confluence Cloud.
• Reviews and discusses a blueprint of the portal shared by the Systems Engineer in a Freehand by InVision tab.
• Sets up Sprints, along with other project baselines via Jira Cloud.
• Reviews the final pull request using GitHub and notifies the team to push the final version live.
• Updates building managers across Contoso of the new portal and walks them through its functions and features.

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

• Protected meeting interface in Microsoft Teams keeps everyone aligned and on the same page.
• Collaborate, ideate and expand upon ideas with Freehand by InVision.
• Plan, track, release software. Manage support, customer service and projects.
• Efficiently manage project documentation with Confluence Cloud in Teams.

Which app integrations on Teams made it possible?

Jira Cloud  Confluence Cloud  Freehand By InVision  GitHub
The Engineering Manager senses the need for a new occupancy management portal and schedules a channel meeting to discuss the same.
Easily schedule meetings and find the best available times for invitees through the native scheduling calendar. The Engineering Manager uses this feature to set up the meeting. Remote team members join the call with ease.
Tabs allow team members to access services and content in a dedicated space within a channel. A team associate shares the portal requirements and pins them in a Confluence Cloud tab.
Collaborate, ideate and draft solutions on an infinite white boarding space with Freehand by InVision in Teams. The Engineering Manager views and discusses the blueprint with the Systems Engineer in a tab conversation.

- **Backend/Admin View**
  - **Upload**
  - **History**
  - **Edit**

  - Excel
  - Access old files
  - Edit individual apartment details

**Upload Format**

Upload excel – (Columns - apartment type, price, availability status, availability date, image link)

**Edit View**

Edit Apartment details, Add/remove images, change status, change price, edit other details
Customize a team with tabs. Add tabs for files, notes, websites and apps – it makes it easy for team members to access frequently used content or services with just one tap.
Organize, prioritize, and assign tasks within a timeline to teammates with Jira Cloud. The Engineering Manager manages the project task board to ensure that everyone is on the same page.
Channel conversations are a great way to track the status of a project as they can contain everything related to the project. The Engineering Manager stays updated about task completion through channel conversation.
GitHub allows you to track pull requests and engage in conversations around code updates to quickly clear blockers and manage projects.
Information Technology – Creating a New Portal for Occupancy Management

The Engineering Manager closes out the conversation after setting up a meeting to walk his team members through the features and functionality of the new portal.
Resolving Issues with the Company Website

IT Manager

Scenario Walkthrough

A well-functioning, bug-free website is an essential part of staying connected with the customer. A Contoso IT Operations Manager is notified of a steep decline in the number of hits on the website homepage. She quickly investigates the issue and coordinates with the engineering team to resolve the bug and make sure that the website is accessible and fully functional.

- Receives notification from the Marketing Manager about a steep decline in the number of hits on the website homepage.
- Cross-checks the reported decline in the number of website hits using a Power BI dashboard and a website tab.
- Schedules a meeting to discuss the issue and shares the incident ticket via xMatters.
- Appreciates the developer for the quick resolution and discusses the next steps within the meeting chat.
- Updates the Marketing Manager about the website being live again.

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

- Effective channel communication with @mention to catch each other’s attention instantly.
- Facilitation of data-driven decisions informed by visualizations and scoring in Power BI for Microsoft Teams.
- Pin a website in a channel tab, so everyone has an easy access to it within Microsoft Teams.
- Collaborate on ticket resolution and discuss tickets within a meeting using xMatters.
@mention a person, channel or team to make sure your message reaches the relevant personnel. The Marketing Manager alerts the IT Manager about the steep decline in the number of website hits.
A Power BI dashboard offers a visually rich view of your data. The IT Manager views a Power BI dashboard to understand website hits data.
The IT Manager also views the website and finds the root-cause: a broken URL. She shares it with the web developer.
Microsoft Teams allows meeting organizers to set a meeting description, invite attendees, pick a time slot, and configure relevant applications for engaging and productive meetings.
Integrate apps directly in Teams meetings—empowering teams to bring incidents directly into meetings where they can collaborate and resolve issues in real-time, directly within the app in the meeting itself.
Complete meeting solutions in Teams support screen sharing, recording, video and audio conferencing. Teams allows you to also attach documents or share relevant information over chat for an engaging meeting experience.
Work with applications and discuss incidents within the meeting interface itself with xMatters. The IT Manager opens the xMatters incident during the meeting to discuss the issue and mitigation plan.
The IT Manager assigns the incident, updates the status and adds comments to the xMatters incident right within the meeting so that everyone is on the same page.
Meeting participants can communicate with each other within the meeting chat with full context of the meeting. The IT Manager receives an update on the resolution of the issue within the meeting chat.
When the web developer fixes the error, the website is live again. The IT Manager updates the team about the same. Use social features like GIFs and emojis to respond and make conversations fun!
Scenario Walkthrough

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

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

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

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

Which app integrations on Teams made it possible?

GitHub

Jira Cloud
Configure GitHub in Microsoft Teams to receive notifications for Pull Requests, Pushes, Issues, Commit comments etc. Jira Cloud bot enables team members to easily find issues, assign them to team members, make edits, log time against an issue, watch/unwatch and vote/unvote on the issue.
As the IT Manager gets notified about a new Pull Request, she fixes the errors and alerts the Tech Lead @mentioning him in the channel.
Jira Cloud for Microsoft Teams makes collaboration and communication over the backlog easy and smooth. The Tech Lead views issues and the progress in the Jira Cloud tab.
Jira Cloud for Microsoft Teams makes collaboration and communication over the backlog easy and smooth. The Tech Lead views issues and the progress in the Jira Cloud tab.
Human Resources

Check out how different HR personas in your organization ranging from HR Manager to the Talent Acquisition Team can boost daily productivity using Microsoft Teams.

**HR Superpowers in Teams**

Capabilities and Features used...

- Channel conversations that keeps everyone in loop
- 1:1 and group chats – conversations the way you want
- Real-time, contextual file sharing and co-authoring
- Channel Tabs for everyone to stay updated
- Real-time monitoring of external data/content

**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

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Meet the Business Decision Makers

Human Resources

HR Manager

“I believe the work environment should be a safe and conducive space to do one’s best.”

- Develop and implement HR initiatives aligned with overall business strategy
- Bridge management and employee relations by addressing demands, grievances or other issues

Hiring and Training Manager

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

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

Director

“Diversity means including people with different perspectives, experiences, opinions and 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
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 safe, protected, and should be extended the benefits of complete healthcare owing to the nature of their work. The HR Manager works with her team using Microsoft Teams to identify new healthcare benefits for these employees and on-site workers.

- Schedules a meeting and presents statistics around health insurance using Excel.
- Collects responses on health coverage from employees with a survey employing Forms.
- Identifies and connects with new Finance Manager using Who.
- Reviews an analysis shared by the Finance Manager using Excel.

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

- Excel helps share important statistics for decision-making right within Microsoft Teams.
- Forms enables gathering immediate responses from team members to support a new project.
- Who helps identify and reach out to staff in various roles in the organization.
- OneNote acts a shared notebook among team members to highlight features and comparisons between products.

Which app integrations on Teams made it possible?

- Forms
- Excel
- OneNote
- Who
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 initiates discussion around health benefits for on-site workers.
Human Resources – New Health Benefits for Employees and On-site Workers

The HR Manager uses Excel to build and present data to the team. Create impactful summaries of crucial data with Excel, Word and OneNote for Microsoft Teams.
Teams and channels are where you hold meetings, have conversations and work on files together with team members. The HR Manager schedules a meeting to discuss the initiative.
Microsoft Teams enables transparent communications through channel conversations. The HR Manager communicates in open-channel conversations about the employee survey activity.
Integrated Forms application within Teams helps systematically gather employee feedback and suggestions. The survey link is shared in the channel where all employees can access it.
Look for employees within your company database based on name, position, or what project they are assigned to using Who in Microsoft Teams. The HR Manager uses Who to identify the new Finance Manager.
Quickly reach out to and chat with co-workers. Take conversations offline from channels for 1:1 discussions. The HR Manager reaches out to the Finance Manager and shares the new health benefit plans with her.
The Finance Manager employs Excel's analytical abilities within Teams to forecast financial implications and shares it with the HR Manager as requested.
The HR Manager closes out the conversation updating the team over the plan approval. Obviously, the employees are happy and applauding the HR team’s initiative!
Strengthening the Workplace Community
HR Manager

Scenario Walkthrough

When employee morale is at risk due to baseless rumors of the delay in Contoso's premium residential project at Lakewood, the HR Manager relies on Microsoft Teams to effortlessly connect and communicate with employees to ease their concerns and foster a strong workplace community.

• Engages a team member to gather organizational negative perceptions in a OneNote channel tab.
• Sets up a channel meeting to show team members the articles and news online that have fueled the rumors.
• Uses Freehand by InVision app to brainstorm a solution with her team to lower employee attrition and to improve moral.
• Schedules a live townhall to make positive announcements about the organization and to assuage doubts.
• Encourages employees to send their questions and concerns to her through a new feedback channel using Forms.

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

• Enable multi-channel communication through 1:1 chat, channel conversations and video/audio conferences with team members.
• Hold seamless calls and conferences and share screens with enterprise security.
• Collaborate, ideate and draft solutions with team members in real-time by using an array of applications hosted in the Teams store, eg. Freehand by InVision.
• Engage your organization with live events and Q&A sessions in Teams.
• Engage employees and gather immediate response for surveys and feedback with Forms.

Which app integrations on Teams made it possible?

Forms OneNote Freehand By InVision
Microsoft Teams enables transparent communications through channel conversations. As the rumors of a project getting delayed spread among the employees, the HR Manager decides to quell the same.
Enjoy powerful document creation with OneNote in Microsoft Teams. A team member uses OneNote to gather organizational negative perceptions and present the findings to the HR Manager for her review.
Microsoft Teams conversations are threaded so users can reply directly in-context to specific conversations. After gaining insight into employee morale, the HR Manager sets up a channel meeting to discuss the action plan.
Plan meetings or keep them impromptu, according to team members’ availability, which reflects in the native scheduling calendar. Hold protected calls and conferences and share screens with enhanced security.
Collaborate, ideate and draft solutions on an infinite white boarding space with Freehand by InVision in Teams. The HR Manager uses the Freehand by InVision app to visualize a town hall schedule with her team.
Microsoft Teams live events are an extension of Teams meetings that enable you to schedule and produce events that stream to large online audiences. The HR Manager uses the live events feature to schedule the townhall.
Organizers can configure permissions for the live event, enable Q&A for the event and customize other permissions based on their requirements.
The HR Manager, who is the organizer of the meeting, can set attendee permissions and send invites for the townhall.
Event organizers can choose to share their screen, present documents, share videos, images and more for an engaging live event.
Producers of the live event can make Q&A sessions more productive by only publishing questions that are relevant to the event. Published audience questions can be viewed by all participants.
Event producers can respond to audience questions, make announcements and engage their meeting attendees without disturbing the presenter.
Integrated Forms application within Teams helps the HR team systematically gather employee feedback and suggestions after the townhall.
Employee Engagement

HR Manager

Scenario Walkthrough

Contoso constantly looks for ways to keep their employee engagement healthy, given the often-stressful conditions their employees navigate. An HR Associate identifies that the best way to do this is to have a highly communicative forum for employees to voice their thoughts. She wishes to measure if this kind of engagement ultimately leads to happier employees.

• Sets up an Employee Engagement channel to get ideas and suggestions from employees.
• Channel communication helps Contoso executives respond to employee suggestions directly and offer inputs on strengthening these suggestions, making them actionable.
• Ideas that gain a lot of traction and discussion are documented in the pinned OneNote tab in the channel.
• Creates a poll using Polly for suggestions that appear consistently.
• Takes steps to immediately initiate a holiday cheer suggestion from employees using Freehand by InVision tab.

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

• Enable organization-wide channel communication to get the best ideas forward.
• Gather employee feedback quickly and easily with Forms.
• Collaboratively expand upon ideas with Freehand by InVision.
• Data analytics to measure employee engagement with Power BI.
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 HR Manager aims to increase employee engagement through channel conversations.
An employee feedback form is pinned as a tab to the channel for employees' easy access and to submit their feedback and inputs.
Add a OneNote tab to your channel in Microsoft Teams and use it as a shared space for notes among team members. The ideas that gain most traction are pinned in a OneNote tab.
Polly is a polling solution that works with Microsoft Teams where your team works best. Intuitive polls designed to help you do your best work!
Use simple tools like Draw, Write, Sketch, and Comment to explore ideas in real time, and save your notes for later. The team uses Freehand by InVision to work on holiday cheer suggestions by the employees.
The HR Manager resourcefully closes out the initiative with a channel post updating team members about the outcome of the collaboration.
The visual Power BI dashboard gives quick indication of the employee happiness index measured after the employee engagement effort.
New Employee Training
Hiring and Training Manager

Scenario Walkthrough

Training new employees can be a time-consuming task when there are so many aspects to the work that one can typically only learn when they are on the job. The Hiring and Training Manager envisions and works towards keeping all the new employee training material available in the Teams platform for easy access and reference while on the job.

- Sends a welcome to the new hires who are notified by chat via Hibob.
- Introduces two new recruits to the training material located in an exclusive channel for new employees.
- Encourages them to download the Teams application on their phone to access training material from anywhere.
- Takes them through the essentials: a kick-off video in the Stream video tab; an Excel training guide; an internal resources OneNote tab; and a conversation tab where employees can ask questions and start discussions.
- Helps them complete an eight-hour training program over Teams to get them ramped up.

How did teams help the Hiring And Training Manager to execute her roles and responsibilities?

- Provide a communicative platform for meetings via PC as well as mobile.
- Keep documentation accessible for team members in a protected Files tab.
- Host a wealth of information using Microsoft Office tools.
- Access training videos with Stream.
- View content that’s broadcasted company-wide with Dynamic Signal.

Which app integrations on Teams made it possible?

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<table>
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<tbody>
<tr>
<td>Word</td>
<td>Excel</td>
<td>Microsoft Stream</td>
</tr>
<tr>
<td>Dynamic Signal</td>
<td>Hibob</td>
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</table>
Use Hibob and personalize onboarding to fuel a sense of belonging from day one. The new employee gets an invitation for onboarding through Hibob.
The first day at the job can be tough! Microsoft Teams helps in making it easy, as the Hiring and Training Manager introduces the new hires to the team and shares the training material with them.
Meetings are not meant for discussions alone in Teams! Train team members virtually anywhere, anytime and schedule meets with ease through the native scheduling calendar. Meeting threads in channels allow conversations before and after the meeting.
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!
Screen share lets you present your screen during a meeting. You can choose to present your entire desktop, a specific application, or a file. Here, the Hiring and Training Manager presents a Word document to the new hires.
Excel allows you to create, share and collaborate on spreadsheets without leaving Microsoft Teams. Here, the Hiring and Training Manager presents an Excel spreadsheet to the new hires.

<table>
<thead>
<tr>
<th>Courses</th>
<th>Duration</th>
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<tbody>
<tr>
<td>Real Estate Business Foundations</td>
<td>Classroom, 5 hours</td>
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<tr>
<td>Real Estate Customer Service</td>
<td>Classroom, 3 hours</td>
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<tr>
<td>Real Estate Leading Practices and Cost Reduction Strategies</td>
<td>Classroom, 5 hours</td>
</tr>
<tr>
<td>Real Estate management Business Game</td>
<td>Classroom, 2 hours</td>
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<tr>
<td>Real Estate Sales and Key Account Management</td>
<td>Classroom, 4 hours</td>
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<tr>
<td>Revenue Strategies</td>
<td>Classroom, 4 hours</td>
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<tr>
<td>Building Teamwork and Creativity</td>
<td>Classroom, 1 hour</td>
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<tr>
<td>Business Ethics</td>
<td>Classroom, 3 hours</td>
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<td>Ground Duties</td>
<td>Classroom, 3 hours</td>
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<tr>
<td>Consumer Protection in Real Estate Project</td>
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<tr>
<td>Deregulation and Open Skies, Alliances, Equity Partnerships and Strategic Partnerships</td>
<td>Classroom, 5 hours</td>
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<tr>
<td>Effective Writing Skills</td>
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<td>Executive Real Estate Policy</td>
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<tr>
<td>Executive Leadership Program for Women in Real Estate</td>
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<tr>
<td>Human Trafficking Awareness Workshop</td>
<td>Classroom, 2 hours</td>
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<tr>
<td>Managing Across Cultures</td>
<td>Classroom, 3 hours</td>
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<tr>
<td>Revenue Management and Pricing with simulation</td>
<td>Classroom, 4 hours</td>
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<tr>
<td>Revenue Management Expert Training with the Revenue Management simulator</td>
<td>Classroom, 3 hours</td>
</tr>
<tr>
<td>Revenue Management for Practitioners with simulation</td>
<td>Classroom, 4 hours</td>
</tr>
<tr>
<td>Route Forecasting and Development</td>
<td>Classroom, 4 hours</td>
</tr>
<tr>
<td>Security Management Systems - SeMS</td>
<td>Classroom, 5 hours</td>
</tr>
<tr>
<td>Security Risk and Crisis Management</td>
<td>Classroom, 5 hours</td>
</tr>
<tr>
<td>Train the Trainer</td>
<td>Classroom, 3 hours</td>
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</tbody>
</table>
Dynamic Signal provides a news feed of content that lives inside of Microsoft Teams. The broadcaster can even track who is reading what content to measure the communication reach.
Review of Hiring Process by HR Leadership

Director

Scenario Walkthrough

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

• Posts a message in HR hiring channel requesting an analysis on hiring trends, diversity efforts and attrition data.
• Responds to queries and replies from HR Associates on her 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 teams help the Director to execute his roles and responsibilities?

• Create conversation threads in channels and keep track of responses with alerts in the activity feed.
• Utilize Power BI to compile and review data in a highly visual format.
• Share suggestions, documents, information, notes and more within a collaborative notebook with OneNote.

Which app integrations on Teams made it possible?

OneNote
Power BI
Channels facilitate instant group communication. Team members stay in the know and can share information directly in the conversation thread to accelerate decision-making. The Director kicks off discussion over hiring trends in the channel.
Channel conversations are also a great place to share snippets of your visual data for team members to understand the discussion points without opening a tab or a file.
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.
Intense in moments of work flurry, these channels also see a fair amount of levity with GIFs and emojis that makes working together fun!
The Director shares his suggestions in the channel using OneNote. The team takes a note of them and updates him on the progress.
Ready to build?

aka.ms/goTeams