Microsoft

Get Started with Microsoft Teams

Tips and tricks to help all types of teams collaborate better.

Welcome

Welcome to Microsoft Teams, the hub for teamwork in Office 365. Now your teams have a shared workspace for conversations, files and meetings—so everyone can be more engaged and effective every day. In this guide, you'll find tips to make the most of Teams for various functions in your organization, including:

- Marketing
- Sales
- Finance
- Human Resources
- Information Technology
- Engineering
- Project Management

Get more from Teams.
Find additional guidance, tutorials, and tips at
www.successwithteams.com

The first 10 things to do in Teams

Before you set up your shared workspace in Teams, get organized with these basic tips.

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1. Start with chat.
Create a small group chat with colleagues you work with most closely, a great way to communicate in the moment. You can name and 'favorite' the chat for easy reference.

2. Connect from anywhere.
Download the Microsoft Teams desktop and mobile apps to enable teamwork from anywhere.

3. Go big.
Create larger teams with dedicated channels to specific topics, projects, disciplines—whatever you like. Better to have fewer, larger teams with more channels than many, small teams with few channels.

4. Customize channels.
Upload files to the appropriate channel and pin frequently used files to make it easier for everyone to find.

5. Add apps to channels.
Do more in one place by integrating favorite apps and services—such as Word, PowerPoint, Excel PowerBI, Planner, SurveyMonkey, HootSuite and more—with team chats and meetings.

6. Consolidate 'need to know' content.
Use OneNote or the Wiki feature to spotlight important content—meeting follow ups, best practices, goals—separate from conversations.

7. Spotlight resources.
Pin key websites used to track news, performance, live site monitoring or metric tracking so everyone can access this information right within Teams

8. Elevate email conversations.
Forward email to a team channel to continue the discussion in a threaded chat conversation, with attachments automatically uploaded for easy team co-authoring.

9. Share content from other services.
Set up connectors to push rich content into Microsoft Teams from services like Trello, GitHub, Bing News, or Twitter; and get notified of the team's activity in that service.

10. Help foster active channels.
Be personally active in channels and @team to highlight posts for the whole group.

Marketing

Marketing teams need to create, collaborate and show results while working with a diverse group of people from both inside and outside the company. Why not do it all in one place? Teams provides a shared workspace for all conversations, files, and third-party services. Now it's easier to manage marketing campaigns and social channels, collaborate on content creation, and plan events.

1. Create a new team named Marketing. Invite internal and external teammates from all marketing groups, including PR, Brand and Design.

2. Add channels for marketing initiatives, projects and teams, such as Go-to-Market, Public Relations, Event Planning and Budget; as well as channels where marketers can interact and communicate with agencies, consultants, and partners using secure guest access.

3. For each channel, connect relevant third-party services, such as Bing News Alerts, Twitter Connector, Adobe Creative Cloud, HootSuite and YouTube.

4. Create and store marketing assets—such as plans, briefs, press releases and design files—in the Files section.

5. Pin the marketing plan, budget and/or campaign landing page to relevant channels for easy reference.

6. Schedule and hold all meetings in Teams using audio and video conferencing features, as well as chat and file-sharing.

Sales

Teams can help sales teams quickly build proposals with input from different stakeholders, while making it easier to manage longer term projects and programs, such as planning, training and sales readiness. Collaboration, reporting, and knowledge sharing can happen in one place, helping sales professionals everywhere—in the home office and the field—work together to meet sales objectives.

1. Create a new team for your entire sales organization or a team for each sales segment.

2. Add channels, such as Sales Readiness, Sales Planning, RFPs/Proposals, Wins, and Best Practices; as well as a channel for general topics.

3. Schedule recurring team meetings, such as monthly business reviews.

4. Upload team documents to relevant channels—sales playbooks and guides in the Sales Readiness channel, RFP documents in the RFP/Proposals channel, and so on.

5. Provide important data and customer information in one place. Pin apps used by your sales team—PowerBI, Planner, task management apps like Trello—to each channel.

6. Set up connectors, such as RSS feeds for customer updates.

Finance

Finance teams need to aggregate and report on data while conducting business reviews on a regular cadence. Teams provides a hub in which all files, data, conversations and meetings can happen in a single place, safely and securely.

1. Create a new team for your entire finance organization.

2. Add channels for Finance Reviews, Business Insights, Audits, Governance and Compliance.

3. Schedule recurring team meetings, such as monthly business reviews.

4. Upload team files to the channels, such as annual financial statement reviews and audit reports.

5. Pin relevant apps used by the team—Excel, PowerBI, Planner—or pin critical files, intranet portals, or websites.

Human Resources

Teams can help HR professionals manage recruitment and employee onboarding activities, including sharing resumes and interview notes, keeping track of candidate information, communicating hiring decisions, and sharing new employee documents.

1. Create a new team for your HR department.

2. Add channels for Recruitment, Training, Events, Reviews, and Onboarding.

3. Schedule meetings—planning, interviews, candidate reviews—in Teams.

4. Upload team files to the channels—HR policies, candidate information, offers, training or recruitment guidance notes, HR portals, feedback forms and surveys.

5. Use a shared One Note or Wiki for candidate feedback.

6. Host training sessions using audio/video conferencing in Teams. Share agendas, presentations, and post-training surveys using third party apps like Survey Monkey.

7. Pin apps used by your HR team, such as Excel, PowerBI, and Planner.

Information Technology

Teams provides IT professionals with a single hub to plan, execute, and manage all phases of infrastructure deployments and rollouts—a useful tool to help drive transformation and change management across the organization.

1. Create a new team and add members from IT and other stakeholders from across the company.

2. Add channels for Service Strategy, Problem, Incident and Change, Deployment, Health and Reporting, Readiness and Adoption, Support and Management and Governance.

3. Upload important files or logs to the channels.

4. Pin relevant apps used by your team, such as Word, Excel or Planner.

5. Set up connectors, such as bots for process automation.

6. Schedule and hold recurring or impromptu meetings with key stakeholders from within Teams.

Engineering

Engineers move quickly between ideation, development and deployment of a concept when delivering new features. Teams is integrated with developer tools, enabling continuous discussion across a distributed team to keep projects on track during sprints, as well as ongoing bug resolution.

1. Create a new team for your engineering group and add key stakeholders across the company.

2. Add channels for General, Feature Releases, Testing, Feedback, Competitive Information, Go-to-Market, Research and Product Analytics to organize and discuss these topics.

3. Upload relevant team files to the channels so everyone can easily find the latest versions.

4. Add tabs for quick visibility to apps and services your team uses, like Planner and PowerBI.

5. Add tabs and connectors for developer tools like VSTS, JIRA, BitBucket, GitHub and more to view and triage issues and pull requests.

6. Schedule and hold regular or stand-up meetings in Teams with key stakeholders.

Project Management

Project managers often struggle with a myriad of planning, meeting, and communication tools and services. Teams enables collaboration in one central hub with all the tools to organize and share project files, manage stakeholder meetings, and track progress for multiple projects.

1. Create a team for each project, and then add stakeholders from across the company.

2. Add channels, such as Planning, Budget, Analytics, Reviews and Feedback.

3. Upload project documents to the channel, such as budgets, schedules, information sources, and guidelines.

4. Pin relevant apps used by your team within each channel, such as Planner, Trello, Smartsheet and PowerBI.

5. Set up connectors, such as bots for process automation.

6. Schedule and hold recurring or impromptu meetings with key stakeholders from within Teams.

Take the next step

Start the conversation. Instead of sending an email to your team, start the conversation in Teams by either inviting your teammates to a team or starting a group chat.

- Add channels.
- Create tabs to integrate tools and services your team cares about.
- Add bots to give automatic updates and notifications.
- Personalize your workspace. Click your profile picture in the bottom corner of the app to change your picture and set your status. Select Options to change your app settings, notifications preferences, language, and more.

Get more from Teams.

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