



Microsoft Teams Rapid Resource Guide

Tips, activities and online training to help
connect, collaborate and create together

March 2020

The time for rapid, highly informed decisions to keep your business working is right now. The way to put the power of Microsoft Teams to work is right here.

Microsoft is making Teams available to all organizations. Accenture and Avanade are here to help.



Protect your people and your productivity

Each section of this guide include links to how-to videos, key activities and best practices to help you put Teams to work.

01

Set up a team

02

Create & collaborate

03

Run internal meetings

04

Run external meetings

05

Project & crisis management

Set up a team

Set up a team

Bring people together to chat, share content and access the tools you need to collaborate and achieve more.

How to create and manage your team

Video: [Intro to Microsoft Teams](#)

Video: [Set up and customize your team](#)

Video: Take Microsoft Teams to the next level: [Part 1](#) and [Part 2](#)

Video: [Create and organize teams](#)

Online training: [Take Microsoft Teams to the next level](#)

How to create and manage channels

Guide: [Create a channel in Teams](#)

Video: [Collaborate in teams and channels](#)

How to have a chat

Video: [Work with posts and messages](#)



Best practices

Determine if a related team might already exist

Setting up a group to collaborate on a piece of work could be as simple as creating a channel or identifying an existing channel for the right subset of the people in an existing team. Make use of private channels to limit access rather than creating a whole new team.

Plan the structure of your team in advance

Add and organize channels based on sub teams or workstreams. Structure folders and subfolders ahead of time.

Use tabs for easy sorting. Add tabs to link to key documents, external sites or external applications that people need to do their work.

Customize your notifications

You can customize notifications to prioritize messages about key projects and avoid being “over-notified.”

Set up a governance process

Governance is key to managing access, documents, and other tasks.

Key activities when setting up a team

Name your team

Choose a name that is short but descriptive and clearly articulates the purpose of the channel. Add a distinctive team icon to make the team easily recognizable in the user's list of teams.

Create channels

Segment your team by creating channels. Channels organize a team's conversations and content. They also provide a way for teams to share content. For example, you can create a project-wide Teams site and then create channels for each of your workstreams. Create private channels for small, ad hoc groups to organize information which doesn't need to be shared across the team. Be thoughtful when setting up channels. Creating too many channels can be overwhelming and create too many places for people to check.

Add all appropriate members and set permissions

It is good to have at least two owners of the team to manage access and other activities.

Create folders within your channel's files section

Within each channel create the appropriate files structure allowing team members to effectively navigate within the team and find information. It may be easiest to use the SharePoint view to set up the folder structures and/or leverage the Files Explorer view.

Manage your notifications

Show team members how to set notifications on channels so they don't miss any chats/updates. Show team members how to set notifications on channels so they don't miss any chats/updates, how to "@" target the team and individuals and how to pin a channel so it is at the top and they will easily see recent activity.

Create & collaborate

- Work on documents together
- Connect across business boundaries
- Hold effective meetings

Work on documents together

Link across store teams to co-author and edit documents in real time, share and files, and gather feedback all in one place.

How to chat effectively

Video: [Start chats and calls](#)

Video: [Work with posts and messages](#)

How to co-author documents

Video: [Collaborate on files](#)

Video: [Upload and share files](#)

Video: [Work together in Teams](#)

Video: [Optimize team conversations](#)

Video: [Collaborate in Teams and channels](#)

Video: [Create a plan with Planner in Teams](#)

Video: [Say hello to Teams](#)

Online training: [Say hello to Teams](#)



Best practices

Work with a cloud-first mentality

Save your files to your Teams, then share a link to save your and your colleagues' inbox space.

Get up to speed on version controls

Learn how file versioning and check-out features work so you can get away from trying to manage versions and archives.

Key activities when working on documents together

Chat

The chat feature lets you name, pin, hide and mute your chats as needed to stay on top of your Teams messages. You can also add emojis to your conversations for additional communication options.

Group your conversations

Threaded conversations or channel conversations live on Teams channels and are visually grouped by a specific topic.

Make calls

Easily call your colleagues both inside and outside your organization.

Collaborate during meetings

Set-up a meeting with one or multiple people. Use the chat or file sharing features during your meetings as well.

Share a link to your file instead of emailing an attachment whenever possible. Use the Share feature next to the document that you want to share in your OneDrive and choose if you would like to allow or block editing and downloading.

Make it easy for team members to reference tasks and keep each other accountable with the Teams Planner application.

Connect across business boundaries

Host and join conference calls and video calls with people outside of your organization even if they're not on Teams.

How to collaborate externally

Guide: [Communicate with users from other organizations in Microsoft Teams](#)

Guide: [Manage external access in Microsoft Teams](#)

How to chat effectively

Video: [Start chats and calls](#)

Video: [Work with posts and messages](#)



Best practices

Host calls with external contacts

For simple video/conference calls with external clients you can set up a normal Teams call and add your external participants. They can join via a browser or Teams client.

Set up guest access

If your external contact does have Teams deployed, inquire if they have guest access enabled and if they could join you on a team.

Access meetings by phone

External clients can also join your Teams meeting by phone, though that would limit their meeting options.

Key activities when connecting across business boundaries

Chat, call and meet with colleagues inside and outside your organization

External colleagues will need to be granted permission to join your meeting. When an external colleague joins your meeting, they will enter a virtual lobby until they are granted permission by a member within the organization. Once allowed into the meeting, your colleague will be able to see screenshare content and participate in the call. If it is your colleague's first time joining your Teams meeting, consider running a test meeting or having them join early to troubleshoot any potential issues.

Put whiteboarding to work

Microsoft Whiteboard is an option if your colleague is on Teams and can add you as a guest to their Whiteboard session (if they have guest access enabled in Teams).

Host meaningful and productive meetings

Use the chat or file sharing features during your meetings and use the @mentioning feature to call out specific people in the comments so they are aware of questions/comments which are directed towards them.

Video is encouraged so that people can read facial cues and to keep participants focused on the conversation at hand, minimizing multitasking.

Bad audio is a showstopper for virtual meetings. Make sure you are in a quiet private space and use an external speaker or headset.

Monitor the meeting chat actively for participants who cannot interject during the discussion or have technical difficulties participating in your meeting. Use Meeting Notes to capture minutes, key decisions, and action items. The Meeting Notes will stay pinned to your meeting for future reference and edits. This is especially useful for recurring meetings.

Hold effective meetings

Bring people together to chat, share content and access the tools you need to collaborate and achieve more.

Schedule and run the meeting

Guide: [Meetings and calls](#)

Video: [View, schedule and manage meetings](#)

Video: [Create ad-hoc meetings](#)

Video: [Join a Teams meeting](#)

Online training: [Maximize Teams meetings](#)

Video: [Maximize Teams meetings](#)

Engage audience

Guide: [Share content in a meeting in Teams](#)

Guide: [Use Whiteboard in MS teams](#)

Record a meeting

Guide: [Record a meeting in Teams](#)

Other useful tips and tricks

Guide: [Blur your background in Teams](#)

Guide: [Turn on Live Caption and Subtitles](#)



Best practices

Use video

People are more engaged when they can see each other. Use video and encourage all participants to do so.

Capture and share notes

Meeting Notes can be captured directly in the meeting and the meeting chat is available for later reference as well as for team members who are not able to join.

Prepare shared content ahead of time

Understand the different ways to share content during the meeting so you are prepared with the best option. Have your content ready to share before starting the call.

Use real-time collaboration tools

Collaboration tools, such as Whiteboard, help capture work and ideas for easy sharing later.

Turn on accessibility options

Teams gives you the ability to turn on live captions and subtitles.

Key activities to hold effective meetings

Scheduling and setting up a meeting

Add the agenda/meeting objective to the Meeting Notes before the meeting starts. If there is a Teams set up for the group that is meeting, schedule the meeting in the Microsoft Teams app (vs. Outlook) and schedule it in a channel in the team so the chat is saved in the channel. Add a OneNote to the meeting channel and keep record of the agenda, notes and actions. Engage with participants via the chat before the meeting if you need to alert them to any prework or expectations. Or have fun and post a GIF to set the tone of the meeting.

Recording a meeting

Often, all invitees cannot attend, or new people are added to a team later and would benefit from a recording. Ensure you have a place to post and share. Not every company enables call recording for all of their employees. If you are sending out the meeting invitation, make sure you have the appropriate recording rights.

Starting a meeting

Test audio, video and say hello to attendees as they join or in a larger setting, ask one person (by name) if they can hear you and see the screen share. If you are recording the meeting, announce just prior to officially starting the meeting that it will be recorded and if anyone does not wish to be recorded, they can choose to leave the meeting or remain silent. For those new to Teams, give a quick overview basic functionality. If it is a large meeting, ask participants to mute to limit background noise.

Engaging your audience

Turn on your video. Pause frequently to allow people to ask questions and remind attendees to use the chat to type their questions or share their thoughts. Ask co-presenters or another participant to watch the chat window and monitor questions. If the meeting is longer than 30 minutes, plan some exercises to engage people approximately every 15 minutes. This might include an icebreaker at the beginning (tell everyone something surprising about yourself), or a survey to get input on people's knowledge coming into the meeting or a meeting evaluation at the end. Microsoft Forms is a great tool for creating surveys and is integrated with Teams. Call on participants by name to keep them engaged ("Sarah, which direction do you think we should go?" or "Bill, what would you add to this discussion?").

Key activities to hold effective meetings

Sharing content

There are three primary ways to share content during a meeting:

- **Desktop:** This will share your screen and allows you to switch between programs, windows and files for all participants to see. If you have multiple monitors, you can choose the one that you'd like to share.
- **Window:** This shares only the window that you select. If you want to share a different window or application, you need to stop sharing and follow the steps again to share the other application.
- **PowerPoint:** This uploads a PPT file to the meeting and allows others to browse the slides and take control to progress the slides. This option allows you to multitask in other windows as the participants will only see the PPT that has been uploaded.

Collaborating during a meeting

If the call requires co-creation or brainstorming, use the virtual Whiteboard. All attendees are able to contribute to the virtual Whiteboard and it will be persistent with the meeting, so participants can continue to contribute. For full functionality in Whiteboard, download and use the Microsoft Whiteboard app which is used outside of Teams. If your company has Microsoft Forms enabled, you can use this as a way to present icebreakers to the group, or to easily gain consensus and feedback on a topic. Use the chat to encourage people to interact during the call. If working on documents as a group, put the link to the document in the chat so participants can open the document and co-create.

Ending a meeting

Remind participants they can continue the conversation in the chat after the meeting. Make sure participants know how to access the Meeting Notes for reference and action items. If you recorded the meeting, post the recording and share with participants.

Run internal meetings

- Host town hall meetings
- Organize learning sessions

Host town hall meetings

Set up and host Teams meetings or live events to keep a large, distributed team up to date on projects, progress, and priorities.

Schedule and run a MS Teams meeting

Guide: [Meeting and calls](#)

Video: [View, schedule and manage meetings](#)

Video: [Join a Teams meeting](#)

Online training: [Maximize Teams meetings](#)

Video: [Maximize Teams meetings](#)

Video: [Create ad hoc meetings](#)

Schedule and run a Teams live event

Video: [How to run a live event](#)

Guide: [Tech administrator sets up live event](#)

Video [Produce a live event](#)

Video: [Moderate a live event](#)

Engage audience and collaborate live

Guide: [Share content in a meeting in Teams](#)

Guide: [Use Whiteboard in MS Teams](#)

Record a meeting/event

Guide: [Record a meeting in Teams](#)

Other useful tips and tricks

Guide: [Blur your background in Teams](#)

Guide: [Turn on Live Caption and Subtitles](#)

Best practices



Choose the right tool for the job

For smaller groups (up to 250 people), you can use a standard Teams meeting which will allow for full interaction with participants.

For larger (250-10,000 people) sessions, use Teams live events, which is intended for one-to-many communications where the host of the event is leading the interactions and audience participation is primarily to view the content shared by host.

Have a detailed "show flow" outlining exactly how the call will run

Assign a producer who will control what/who is shown when during the call. Plan in advance who all of the presenters will be and ensure they all have a great connection, proper lighting, know their part, know who they are handing over to, and are well prepared.

Do a practice run

Test all presenter connections and video and do a run-through of the session at least one day before.

Key activities when hosting town hall meetings

Schedule the town hall

For a Teams meeting with less than 250 participants, you can schedule it as a standard meeting. Scheduling a Teams live event requires using the Teams app, going into the calendar and selecting live event. This will create a shared URL to distribute to participants. If the audience size is getting close to 250, use Teams live events to ensure the best end user experience. You will need to decide if you want the session recorded and if the session should have Q&A enabled.

Send out the invite

For standard Teams meetings, attendees are invited through a meeting invite in Teams or Outlook. For Teams live events, attendees are invited through distribution of a shared URL after the live event is scheduled in Teams calendar. Include the purpose and/or agenda with the invite, or update it before the call, with enough lead time so attendees can digest and prepare.

Planning your agenda

When planning your agenda, take into account icebreakers, polls, breaks, and other ideas to help facilitate interaction. Remember, in Teams live events, participants can only interact through submitting questions in the Teams chat or in Yammer. Ensure participants know where to go to submit questions before the event.

Prepare for the event

With a larger event, it will be important to determine roles and responsibilities ahead of time. This includes who will be the organizer(s), producer(s) and presenter(s), along with support roles such as dedicated note takers and Q&A facilitators. Ensure a full tech rehearsal at least a day, but optimally 48 hours, before the event. This will ensure that all connections and video are adequate. Review the show flow with all presenters so they are comfortable with their role.

Key activities when hosting town hall meetings

Run the event

If you are using a standard Teams meeting to hold a town hall with less than 250 people, it is important to ensure participants know how to mute themselves and keep themselves muted. Background noise can be very distracting with a large audience. It may also be helpful to have someone monitoring the participant list and muting anyone who is not muted. Presenting in a Teams live event works similar to a regular team meeting where multiple types of content can be shared, but only by the producer(s) or presenter(s).

Participate through the Q&A function

Since attendees are not able to speak up during the live event, the Q&A functionality enables attendees to participate. The Q&A functionality is hosted within Teams via the existing chat functionality or in a Yammer conversation. Questions must be published in order for all attendees to see the question and related answer provided. Let attendees know that when they submit a question, their name will be recorded with their question. If they do not wish to be identified, they should select “ask anonymously.” Ensure that there is at least one person managing the Q&A. For each question, they can give a private reply, reply and publish the question, or dismiss the question. If key links or content are brought up during the call, these can easily be shared to all participants by sending the information via the chat.

Follow up

The producer can download the recording along with reports on engagement and the Q&A. Promptly follow up with the event recording and any materials covered over the call. This may include additional Q&A materials that were not addressed during the call.

Organize learning sessions

Share the materials you need to educate and inform your team, then encourage participation to enhance learning.

Create a team

Video: [Say hello to Teams](#)

Online training: [Say hello to Teams](#)

Create and manage channels

Guide: [Create a channel in Teams](#)

Video: [Collaborate in teams and channels](#)

Schedule a Teams meeting or live event

Article: [Schedule a meeting in Teams](#)

Video: [Schedule a Teams live event](#)

Record a meeting

Guide: [Record a meeting in Teams](#)

Create a video library with Stream

Article: [Use Microsoft Stream in Microsoft Teams](#)

Collaborate with Microsoft Whiteboard

Article: [Use Microsoft Whiteboard in Teams](#)

Poll channel participants with Polly

Article: [Create a poll in Microsoft Teams](#)

Assign tasks and schedule due dates with Planner

Video: [Create a plan with Planner in Teams](#)

Best practices



Use a private channel to prepare and another for learners

Create a private Teams channel to co-create session materials with other session planners, then set up a meeting on this channel to dry run the presentation. Set up another Teams channel to engage session participants before, during and after your event.

Organize learning materials

Share and organize files to encourage self-directed learning along with instructions for navigating your learning modules. You can also use the Stream application to create a video library within Teams.

Put two facilitators in charge

When conducting a live session, it is ideal to have two facilitators: One to lead the session and the other to moderate the chat thread for questions, comments and feedback from the audience.

Put participation tools to work

Use Microsoft Whiteboard to have your audience draw, sketch and write together on a shared digital canvas during your learning session. Use the Polly application to poll your audience.

Key activities when organizing learning sessions

Set up a Teams meeting for smaller, interactive sessions where audience discussion is encouraged

A Teams meeting is limited to a total of 250 people on the call.

Set up a Teams live event for larger sessions where communication is primarily one-to-many

Teams live events is an extension of Teams meetings, enabling users to broadcast video and meeting content to a large online audience. With this version of Teams, up to 10,000 attendees can join the event but can only participate via text-based Q&A.

Use the chat, file sharing and notebook features for interactive learnings

Use chat to monitor and encourage questions, feedback and ideas from the audience throughout your session, whether it's a Teams meeting or live event.

Monitor the meeting chat actively

There may be participants who cannot interject during the session or who have technical difficulties participating in your meeting. Use the @ mentioning feature to call out specific people in the comments so they are aware of questions or comments which are directed toward them.

Use Meeting Notes

Capture minutes, questions, feedback or action items. The Meeting Notes will stay pinned to your meeting for future reference and edits.

Create channels within your Team

Channels organize a team's conversations and content. Segment your team by creating channels. For example, if you plan to run different training sessions with different groups of people, you can create an initiative-wide Teams site and set up different channels for different lesson topics or audiences. Create private channels for small, ad hoc groups—for example, to co-create training materials with other session planners before your learning session.

Key activities when organizing learning sessions

Access and edit files as a group

Shared files can be found in the Files tab at the top of each channel. Shared files can be collectively organized, accessed and edited by channel participants. You may restrict shared editing for files that you do not wish to be altered, particularly for standardized learning materials. For example, to restrict the shared editing of a document, open the document and click Restrict Editing in the Protect section of the Review tab. Different files can be made available to different channels within the same team. Files shared in a private channel are only visible to those with access to that channel.

Record live learning sessions for later use

Record your meetings in Teams to capture audio, video, and screen sharing activity. To start recording a meeting, go to the meeting controls, click the three dots to view more options, then select “Start recording”.

Use the Teams Planner to assign tasks, set due dates and create a shared schedule

Make it easy for learners to track and manage lesson-related assignments with the Teams Planner application and scheduling feature.

Use Microsoft Whiteboard to collectively draw, sketch and write together

When facilitating online learning sessions, consider using Microsoft Whiteboard, a free-form digital canvas where people, content and ideas can come together in real time.

Run external meetings

- Run interactive workshops
- Conduce remote board meetings
- Sell virtually



Run Interactive Workshops

Connect groups for real-time co-creation through video, chat, whiteboarding and more, then share the output and results.

Schedule and run meeting

Guide: [Meeting and calls](#)

Video: [View, schedule and manage meetings](#)

Video: [Join a Teams meeting](#)

Online training: [Maximize Teams meetings](#)

Video: [Maximize Teams meetings](#)

Video: [Create ad hoc meetings](#)

Engage audience and collaborate live

Guide: [Share content in a meeting in Teams](#)

Guide: [Use Whiteboard in MS Teams](#)

External collaboration

Guide: [Communicate with users from other organizations in Microsoft Teams](#)

Guide: [Manage external access in Microsoft Teams](#)



Best practices

Set your goals, prepare and plan

Successful workshops require a clear alignment on desired goals and outcomes. Virtual workshops require more preparation compared to on-site workshops—account for double to triple the amount of planning and organization.

Remember less is more

Expect to cover about 1/3 of the activities that you would normally cover in a physical workshop and favor activities that can be done individually. Play music during the silent time!

Plan for interactivity, show and tell

If your workshop is interaction-heavy, consider the general rule of thumb of one facilitator to six participants. If a large audience is expected, use breakouts. Using a collaboration tool like Microsoft Whiteboard is key for engaging participants.

Schedule sessions and breaks

Attention spans tend to wander around the 2-4 hours mark. If possible, consider scheduling segments of the workshop across multiple days or weeks.

Key activities when running interactive workshops

Schedule and prepare for the workshop

Make sure attendees will have access to Teams so that they can fully use the tool and collaborate in the workshop. Test every activity and tool and conduct full dry runs with your stakeholders prior to the event. Have a Plan B in place if the activities do not work out as intended.

To potentially save time during the workshop, assign prework and other self-guided tasks, but note that not everyone will participate in the prework. Include the purpose and/or agenda with the invite or update it before the call with enough lead time so that attendees can digest and prepare. When planning your agenda, take into account icebreakers, polls, breaks, and other ideas to help facilitate interaction.

Remember to schedule breaks

Encourage video participation by including a note about it in the invite.

Video will help keep your participants focused on the workshop and minimize multitasking. If your company allows recordings, decide if the workshop should be recorded and make sure you are comfortable with how it works.

With a larger meeting, it will be important to determine roles and responsibilities ahead of time. This can include dedicated note takers, facilitators, whiteboard owners, etc.

Key activities when running interactive workshops

Run and participate in the workshop

Turn on video when joining the workshop to encourage connection and engagement. Establish ground rules early and reinforce them consistently. This will solidify your role as a facilitator and clarify guidelines and expectations for engaging in the workshop.

Share key content during the workshop. You can share your entire screen or only certain windows to minimize distractions. If key links or content are brought up during the call, these can easily be shared to all participants through the workshop's chat. Those who were unable to attend the workshop will also be able to see this information. Chat can be helpful if an attendee is in a noisy environment, but still would like to contribute to the call. However, it can lead to tangential conversations.

For workshops that require co-creation or brainstorming, use the virtual Whiteboard. All attendees can view and contribute to the virtual Whiteboard. If your company has Microsoft Forms enabled, you can use this as a way to present icebreakers, easily gain consensus, or gather feedback on a topic. Use the Notes function in the workshop to easily collaborate on and share workshop notes.

Ensure that all voices are heard. Design thinking is a great way to equalize the different voices in your workshop. Use fun sound effects and/or visual warnings for rule breaks and timing. Set a specific time limit for every activity.

Follow up after the workshop

Promptly follow up with workshop, including key content such as poll results and the final whiteboard. You can send this over email with links to the content in Teams, or you can use a Teams page or channel to update attendees.

Conduct remote board meetings

Prepare and share all leadership documents to conduct meetings with internal and external board members.

Guides and videos

[Create a channel in Teams](#)

[Collaborate in teams and channels](#)

[Upload and share files](#)

[Work together in Teams](#)

[Optimize team conversations](#)

[Schedule a meeting in Teams](#)

[Managing guest access in Microsoft Teams](#)

[Create a plan with Planner in Teams](#)

[Blur your background in Teams](#)

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Best practices

Set up security for confidential materials

Create a team with restricted access and nominate someone to closely monitor access. Save key collateral such as presentations and meeting minutes in a secure repository and dedicate one channel for housing it.

Make sure you have guest access

Check your organization's Teams licensing for guest access to make sure you can invite external participants and prospects.

Check connectivity & share materials beforehand

Have the planning team reach out to individual directors ahead of the meeting to check on potential connectivity issues and answer questions on how to access files and meetings.

Identify two facilitators for live sessions

When conducting a live session, it is ideal to have two internal facilitators: one to oversee the session and the other to capture meeting minutes.

Engage with board members

Use interactive techniques and screenshare presentations to help participants easily follow along.

Key activities when conducting remote board meetings

Create a Teams channel to share and collaborate on files

Files shared within a channel can be found in the Files tab at the top of each channel. Shared files can be collectively organized, accessed and edited by channel participants. You may restrict shared editing for files that you do not wish to be altered. For example, to restrict the shared editing of a document, open the document and click “Restrict Editing” in the “Protect” section of the “Review” tab.

Set channel permissions to limit access to sensitive files and materials, such as financial information or proprietary data. Different files can be made available to different channels within the same Team.

Files shared in a private channel are only visible to those with access to that channel. Create a folder for final materials on Teams and define proper access rights.

Schedule meetings

You can invite external guests, such as board members, to Teams channels and meetings. Guest access is included with all Office 365 Business Premium, Office 365 Enterprise, and Office 365 Education subscriptions.

Use Teams Meeting tools such as screensharing (if needed) during your meeting to share your materials and replicate the experience of being in the room together as closely as possible.

Depending on how the call is set up, external board members may need to be granted permission to join your meeting. If the call is not automatically open to all attendees, when an external participant joins your meeting, they will enter a virtual lobby until they are granted permission by a member within the organization. Once allowed into the meeting, the participant will be able to see screenshare content and participate in the call.

Key activities when conducting remote board meetings

During the meeting

Establish ground rules early and reinforce them consistently. Ground rules will solidify your role as a facilitator and clarify guidelines and expectations for engaging in the meeting.

Share content in three ways:

- **Desktop:** This shares your screen and allows you to switch between programs, windows and files for all participants to see. If you have multiple monitors, you can choose the one that you would like to share.
- **Window:** This shares only the window that you select. If you want to share a different window or application, you need to stop sharing and follow the steps again to share the other application.
- **PowerPoint:** This uploads a PPT file to the meeting and allows others to browse the slides and take control to progress the slides. This option allows you to multi-task in other windows as the participants will only see the PPT that has been uploaded.

After the meeting, store and share final content

Include meeting minutes, resolutions and approvals, presentation materials, and any other important output.

Sell virtually

Manage your sales lifecycle—from collaborating on an RFP response, to holding virtual sales meetings and whiteboarding sessions with prospective clients.

Guides & videos

[Create a channel in Teams](#)

[Optimize team conversations](#)

[Managing guest access in Microsoft Teams](#)

[Record a meeting in Teams](#)

[Use Microsoft Whiteboard in Teams](#)

[Create a poll in Microsoft Teams](#)

[Microsoft Teams Integration with Dynamics 365 Apps](#)

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Best practices

Rally your sales team

Create an internal Teams channel to share files related to sales opportunities and RFPs. Collaborate to co-create responses, sales decks and meeting agendas. Integrate with PowerBI's dashboard capabilities to track sales and opportunity pipelines.

Do a run-through

Before any high-stakes, externally-facing sales meeting, practice running the meeting several times in advance with your team—especially important when selling virtually.

Set up for success

Share files like your meeting agenda, sales deck or other pre-read materials prior to your meeting, then post action items and follow up activities after the meeting.

Read the room

Set expectations that all meeting participants join by video. This is critical to reading the body language and spatial cues of your prospects.

Get feedback

Use the Form application to poll your audience before, during or after your meeting. For example, consider conducting a needs assessment before a sales meeting with prospects.

Key activities when selling virtually

Create a Teams channel to share and collaborate on RFP responses, sales presentations and other materials

Files shared within a channel can be found in the Files tab at the top of each channel. Shared files can be collectively organized, accessed and edited by channel participants. You may restrict shared editing for files that you do not wish to be altered. For example, to restrict the shared editing of a document, open the document and click “Restrict Editing” in the “Protect” section of the “Review” tab.

Set channel permissions to limit access to sensitive files and sales materials, such as pricing information within an RFP or proprietary client data. Different files can be made available to different channels within the same Team. Files shared in a private channel are only visible to those with access to that channel.

Schedule sales presentations and meetings

Invite external guests, such as prospective clients, to Teams channels and meetings. Guest access is included with all Office 365 Business Premium, Office 365 Enterprise, and Office 365 Education subscriptions.

A Teams Meeting is limited to a total of 250 people on the call. Use Teams Meeting tools such as chat, video and screensharing during your meeting to share your sales materials and replicate the experience of being in the room together as closely as possible. Use the Microsoft Whiteboard application to run a digital whiteboarding session with client prospects and collectively draw, sketch and write together on a digital canvas.

The meeting organizer can mute all other participants in a meeting. Go to the meeting roster and select “mute all”. Each participant will get a notification and be able to unmute themselves as needed.

Key activities when selling virtually

Record live meetings for later use

- Record your meetings in Teams to capture audio, video and screen sharing activity.
- You can record meetings and group calls.
- To start recording a meeting, go to the meeting controls, click the three dots to view more options, then select “Start recording”.
- Recording one-on-one calls is not yet supported.

Integrate Microsoft Teams with Dynamics 365 apps

- Open your Dynamics 365 dashboard in Teams.
- Access Dynamics 365 data (e.g., records, customer information, active accounts) from within Microsoft Teams, along with the Dynamics 365 bot.

Project & crisis management

- Project management
- COVID-19 & Crisis management



Project management

Link workers and workflows for efficient, effective project management. Configure your channels with the right mix of applications based on the type of work you are managing.

Guides and videos

[Create a channel in Teams](#)

[Collaborate in teams and channels](#)

[Managing guest access in Microsoft Teams](#)

[Collaborate on Files](#)

[Upload and share files](#)

[Work together in Teams](#)

[Optimize team conversations](#)

[Schedule a meeting in Teams](#)

[Record a meeting in Teams](#)

[Use Microsoft Whiteboard in Teams](#)

[Azure Pipelines with Microsoft Teams](#)

[Power BI Tab for Microsoft Teams](#)

[Create a plan with Planner in Teams](#)

[Explore Microsoft Teams Apps](#)

[Add an App to Teams or to a Specific Channel or Chat](#)

[Integrate Apps and Automate Workflows with Microsoft Teams](#)

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Best practices

Kick projects off right

Set up a Team with the appropriate channels and app configurations before kicking off a project. You can connect hundreds of apps and services to Teams, including Office 365 apps. Use tabs, connectors, bots, and more to integrate your favorite apps directly into your Teams experience.

Prioritize sharing

Set up your shared Team file folders in advance of kicking off a project to organize where your team will share, store and collaborate on different types of files.

Work with a Wiki

Create shared Team Wiki pages to outline project-related best practices, provide links to relevant tools and templates, or to capture client meeting notes and to-dos.

Keep everyone on track

Use the Planner app to assign and track team tasks and create a shared team schedule.

Train your team

When managing a project virtually, take time upfront to train the project team on virtual collaboration methodologies and what to expect during virtual meetings or workshops.

Key activities for project management

Invite clients or external partners to join your Team

Guest access allows them to access all public channels within your Team and share files within those channels. Inform external guests that they must have an Office 365 work or school account. If they do not have a Microsoft account associated with their email, they'll be prompted to create one for free.

Access and edit shared files

Files shared within a channel can be found in the Files tab at the top of each channel. Shared files can be collectively organized, accessed and edited by channel participants. You may restrict shared editing for files that you do not wish to be altered. For example, to restrict the shared editing of a document, open the document and click "Restrict Editing" in the "Protect" section of the "Review" tab.

Set channel permissions to limit access to sensitive files or files not meant to be shared externally, especially if your Team includes external participants, such as clients. Files shared in a private channel are only visible to those with access to that channel.



Best practices

Manage external access

Invite clients or other external partners to join your Team with guest access, allowing them to participate in all public channels within your Team, including file sharing. For channels with chat threads and files not meant to be shared externally, configure private channels so that only internal team members can access them.

Be heard

During virtual meetings on Teams, speak with energy and clarity and use video whenever possible, since body language, words and tone take on elevated meaning in a virtual setting.

Schedule regular check-ins

Schedule weekly Teams meetings using video and screensharing to communicate progress on a weekly basis and ensure everyone's feedback is gathered early and often.

Plan ahead

Try to schedule all meetings well in advance to ensure team members have time to coordinate their schedules.

Key activities for project management

Schedule client presentations and meetings

You can invite external guests, such as clients, to Teams channels and meetings. Guest access is included with all Office 365 Business Premium, Office 365 Enterprise, and Office 365 Education subscriptions. Set expectations that all meeting participants are to join by video so you can assess the body language and spatial cues of your clients.

Use Teams Meeting tools such as chat, video and screensharing during your meeting to replicate the experience of being in the room together as closely as possible.

Use the Microsoft Whiteboard application to run a digital whiteboarding session with client prospects and collectively draw, sketch and write together on a digital canvas.

As the meeting organizer, if you wish to mute all other participants in a meeting, go to the meeting roster and select “mute all”. Each participant will get a notification and be able to unmute themselves when needed.

Record live meetings for later use

Record your meetings in Teams to capture audio, video and screen sharing activity.

You can record meetings and group calls. Recording one-on-one calls is not yet supported.

Key activities for project management

Integrate the apps you need

Go to Microsoft AppSource (the Microsoft Teams app store) to explore hundreds of apps you can connect and integrate into your Teams experience and project-related channels. Add apps to the left side of your Teams menu or within a specific channel or chat, depending on how you plan to use that app and who you plan to use it with.

If there is no existing app to address a specific need of your team, you can use Power Platform to develop your own custom apps, automated workflows and dashboards that integrate with Teams, then make your apps available within the Microsoft app store.

Not all apps are free. Some apps require you to have a license for the technology product or service that the app is designed to integrate.

Review popular apps

OneNote: Enable shared, collaborative notetaking.

Whiteboard: Create a shared digital canvas or use it alongside chats and video calls to facilitate visual collaboration.

Forms: Co-create and conduct surveys and polls that, once created, can be published to your channels.

Planner: Create boards with assigned team tasks and to manage your team's shared schedule.

Power BI: Add Power BI reports to your channels to help drive data-driven decision making from within Teams.

Azure DevOps: Integrate your Azure DevOps pipelines into Teams for managing app development projects.

Microsoft Dynamics 365: Access the Dynamics 365 dashboard and data (e.g., records, customer information, active accounts) from within Teams, along with the Dynamics 365 bot.

COVID-19 and crisis management

Manage your crisis response remotely and communicate with your staff during COVID-19 or any disruption.

Set up a site or “war room” for leaders to collaborate around the crisis

[Human resilience: What your people need during COVID-19](#)

[Crisis communications using Microsoft Teams](#)

[Set up and customize your team](#)

[Create and organize Teams](#)

[Collaborate in teams and channels](#)

Quickly create a crisis communications channel for employees

[Crisis Communications Power App](#)

[C-19 Health Bot Quick Start](#)

[A Microsoft Power Platform Solution for Healthcare Emergency Response](#)

Develop templates for new ways of working

[Using Teams for clinical continuity in healthcare](#)



Best practices

Bring cross-functional internal and external stakeholders together

Set up a team and organize teams into channels to quickly respond to the crisis by establishing a central space for collaboration. Easily determine when all key players are available to meet, then schedule meetings that include screen sharing and video conferencing.

Collaborate on rapid response materials

Use features like channel conversations, chat threads, video conferencing, file sharing and collective document editing to brainstorm solutions and track important tasks, activities and decisions.

Share important communications with employees

Establish a specific team for crisis responses and policies with all employees. Use notification options to alert employees of new information.

Create a live feed

Channel discussions can be used as a live feed to get the latest updates and to keep everyone in the loop on the latest status and developments (instead of sitting on a conference bridge for hours to receive updates).

Use video to show your response in action

Mobile video conferencing makes it easy to show crisis response teams exactly what is happening on the ground or on the frontlines of the crisis by connecting field workers, experts and war room teams.

Key activities for crisis management

Set up a Microsoft Teams site for leaders to collaborate on your company's response to COVID-19

Configure channels with relevant apps—from the Microsoft Planner app, to the Crisis Communications app—to track the impacts the crisis is having on your business. Use the Microsoft Dynamics 365 app to create visibility into your CRM system, or use something as simple as a SharePoint list or Excel spreadsheet.

Use Teams to jumpstart discussions on how to take care of employees and customers during the crisis. Enable collaborative authoring between communication and policy leaders. Provide links to reference materials from government and healthcare organizations and post and track action items using Planner.

Set channel permissions to limit access to sensitive files or files not meant to be shared externally, especially if your Team includes external participants, such as clients. Files shared in a private channel are only visible to those with access to that channel.



Best practices

Create private channels for sensitive collaboration

Set permissions so that only those provided access can view these channels.

Connect relevant apps available through Teams

Configure them as tabs in your channels to stay organized and effectively respond to the crisis. For example, add a Wiki tab to a channel to track crisis response notes, activities, risks and issues. Add a Planner tab to assign crisis response action items and track team progress using a shared schedule.

Manage your organization's response to COVID-19

Use Power Apps and Power Automate Crisis Communication templates. You can design custom apps and make them available for other Teams users, or use the new crisis response apps now available, such as the free Crisis Communication app. They give you a single portal equipped with recommendations from global health authorities and government officials. You can also use the Power Platform healthcare emergency response templates to help manage beds, equipment, patients and more.

Key activities for crisis management

Develop Teams templates for new ways of working

Identify key business processes in your company. Catalog the key tasks that need to be completed, what information and applications employees need to perform those tasks, who they need to collaborate with along the way, and what a potentially improved workflow would be. Use Teams to create a template that will be used for each instance of executing the process (e.g., a new sales opportunity, a new case, a new IT project, etc.)

Integrate key applications and information sources as tabs in the Team. Support tasks and workflow through Planner and integrate them into the Team. Automate appropriate tasks and workflows by creating bots that live in the Team. Use Microsoft Graph to automate processes according to the template.

Use different meeting forums for different types of crisis communications

Use Teams Meetings for smaller, collaborative, interactive sessions where participation is encouraged. A Teams Meeting is limited to a total of 250 people. Set up a Teams Live Event (an extension of Teams meetings) for larger sessions where communication is primarily one-to-many. A Live Event broadcasts video and meeting content to up to 10,000 attendees who can then only participate via chat Q&A.

Use the chat, file sharing and Wiki features to collaborate effectively and respond rapidly

Use the chat feature to monitor and encourage questions, feedback and ideas. Use the @mentioning feature to call out specific people in the comments so they are aware of questions or comments directed toward them. Use Meeting Notes, a shared notebook, to capture minutes, questions, feedback or action items. The Meeting Notes stay pinned to your meeting for future reference.

Key activities for crisis management

Create the appropriate channels within your Team

Channels organize a team's conversations and content. Segment your Team by creating channels. For example, if you have different crisis response teams and initiatives, you can create a crisis response Teams site and set up different channels for different audiences. Create private channels for groups discussing sensitive, crisis-related matters that need to be handled with care.

Collectively access and edit files shared within a channel

Files shared within a channel can be found in the Files tab at the top of each channel. Shared files can be collectively organized, accessed and edited by channel participants. You may restrict shared editing for files that you do not wish to be altered, particularly for standardized crisis response materials. Files shared in a private channel are only visible to those with access to that channel.

Record meetings for later use

Record crisis response webinars, meetings or presentations for wider distribution.

To start recording during a meeting, go to the meeting controls, click the three dots to view more options, then select "Start recording".

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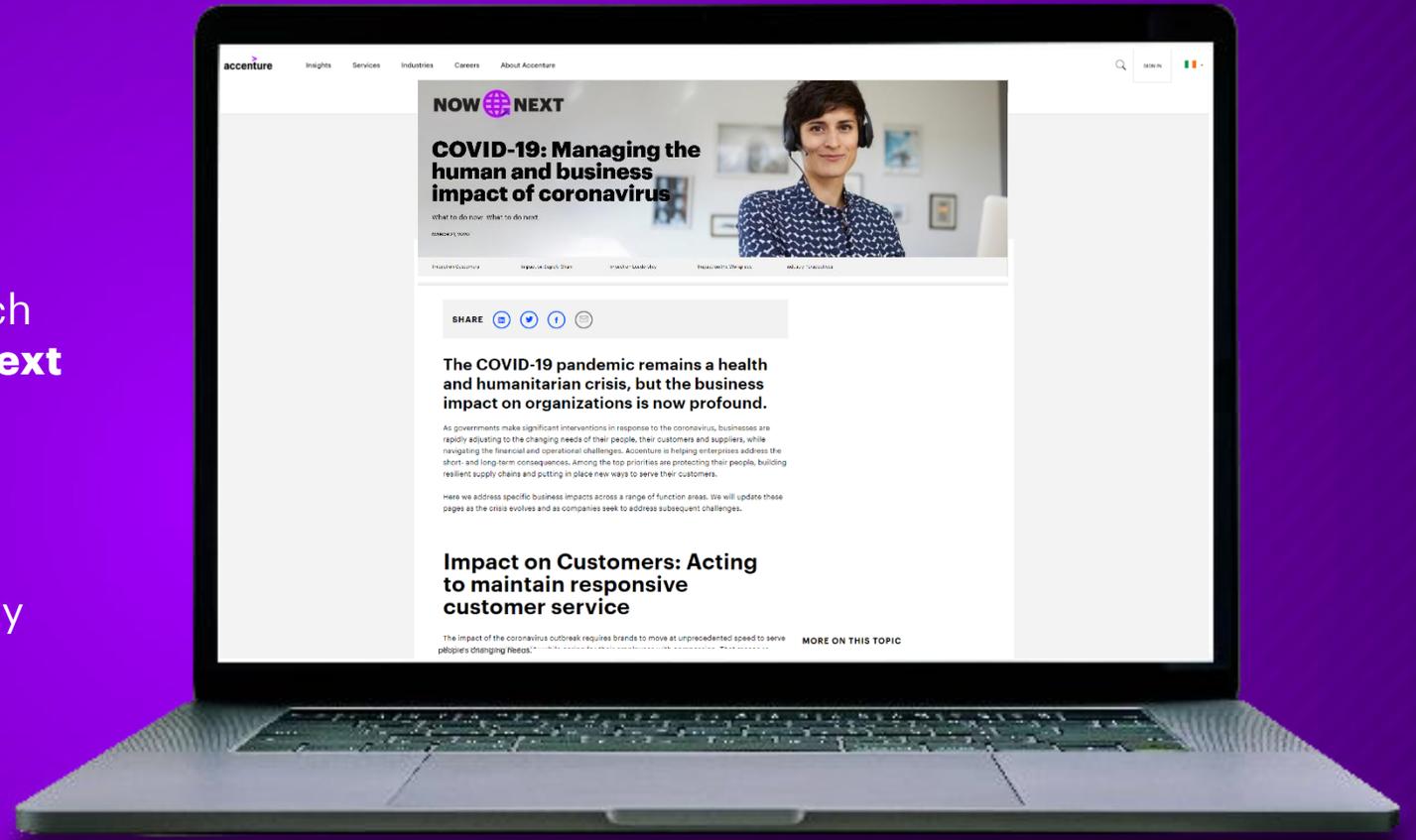
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To help our clients navigate both the human and business impact of COVID-19, we've created a hub of all of our latest thinking on a variety of topics.

Each topic highlights specific actions which can be taken **now**, and what to consider **next** as industries move towards a new normal.

From leadership essentials to ensuring productivity for your employees and customer service groups to building supply chain resilience and much more, our hub will be constantly updated. Check back regularly for more insights.

[VISIT OUR HUB HERE](#)



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