



Microsoft Teams Rapid Resource Guide

How to enable effective remote working at speed with Microsoft Teams



You need to keep your business moving. You need to introduce remote working smoothly.

And you need to do that quickly. That's why – today more than ever – it's time for Teams.

Microsoft is making Teams available to all organizations. Avanade is here to help you put the power of Teams to work, at the heart of your Workplace Experience transformation.

Protect your people, propel productivity

This guide features how-to videos, key recommendations and best practices to help you put Teams to work, including:



Setting up a team



Working on documents together



Working across boundaries



Holding effective meetings



Hosting town hall meetings



Running interactive workshops



Organizing learning sessions



Setting 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
- [Video](#): Create and organize teams
- [Online training](#): Take Microsoft Teams to the next level – online training

How to create and manage channels

- [Guide](#): Create a channel in Teams
- [Video](#): Collaborate in teams and channels

How to chat

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

Best practice recommendations

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 subteams or workstreams. Structure folders and subfolders ahead of time.

Use tabs for easy sorting

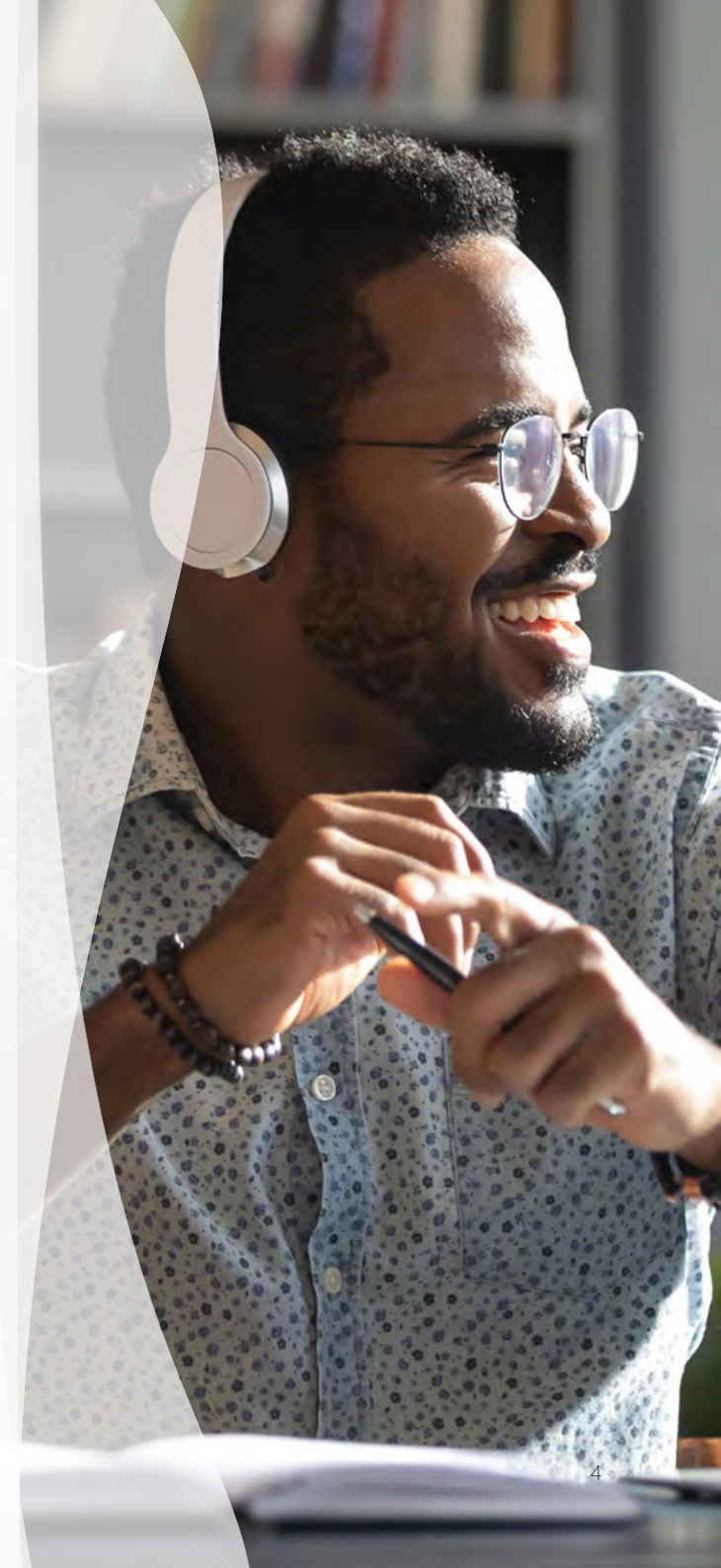
Add tabs to link to key documents, external sites or external applications that people need to do their work.

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

1. 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.

2. 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 set up channels for each of your workstreams. Establish private channels for small, ad hoc groups to organize information that doesn't need to be shared across the team. Be thoughtful when setting up channels. Creating too many channels can be overwhelming and result in too many places for people to check.

3. Add all appropriate members and set permissions

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

4. 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.

5. Manage your notifications

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's at the top and they will easily see recent activity.



Collaborating on documents

Link across teams to co-author and edit documents in real time, share and store 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 online training

Best practice recommendations

Adopt 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

1. 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.

2. Group your conversations

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

3. Make calls

Easily call your colleagues both inside and outside your organization.

4. 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.



Working across business boundaries

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

How to collaborate externally

- [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 practice recommendations

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 has Teams deployed, inquire if they have guest access enabled and if they could add you to 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 working across boundaries

1. 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're 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's your colleague's first time joining your Teams meeting, consider running a test meeting or having them join early to troubleshoot any potential issues.

2. 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).

3. 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're aware of questions/comments that 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're 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.



Holding 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](#): Meeting and calls
- [Video](#): View, schedule and manage appointments
- [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 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 captions and subtitles

Best practice recommendations

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 tools

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



Key activities when holding effective meetings

1. Scheduling and setting up a meeting

Add the agenda/meeting objective to the Meeting Notes before the meeting starts. If there is a team 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 a record of the agenda, notes and actions. Engage with participants via the chat before the meeting if you need to alert them to any pre-work or expectations. Or have fun and post a GIF to set the tone of the meeting.

2. 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.

3. 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 of basic functionality. If it is a large meeting, ask participants to mute to limit background noise.

4. 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 when holding effective meetings

5. 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.

6. 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.

7. 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.



Hosting 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 Teams meeting

- [Guide](#): Meeting and calls
- [Video](#): View, schedule and manage appointments
- [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
- [Video](#): 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 a Teams meeting

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 practice recommendations

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 to 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 the 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.

Use real-time collaboration tools

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

Turn on accessibility tools

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

Key activities when hosting town hall meetings

1. Schedule the town hall

For a Teams meeting with fewer 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.

2. 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 the 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.

3. 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.

4. 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

5. Run the event

If you are using a standard Teams meeting to hold a town hall with fewer 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 Teams meeting where multiple types of content can be shared, but only by the producer(s) or presenter(s).

6. 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.

7. 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.



Running interactive workshops

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

Schedule and run a Teams meeting

- [Guide](#): Meeting and calls
- [Video](#): View, schedule and manage appointments
- [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 a Teams meeting

External collaboration

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

Best practice recommendations

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 one-third 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.

Do a practice run

Attention spans tend to wander around the two-to-four hour mark. If possible, consider scheduling segments of the workshop across multiple days or weeks.



Key activities when running interactive workshops

1. 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 pre-work and other self-guided tasks, but note that not everyone will participate in the pre-work. 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.

2. 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

3. 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.

4. Follow up after the workshop

Promptly follow up after the 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.



Organizing 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 Team

Collaborate with 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 practice recommendations

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 for a dry run of 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

1. 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.

2. 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.

3. 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.

4. 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 that are directed toward them.

5. Use Meeting Notes

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

6. 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

7. 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.

8. 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."

9. 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.

10. 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.



Microsoft Teams – the platform that's part of something bigger

Discover how a holistic approach to Workplace Experience transformation – with Teams playing a crucial role – can help your business achieve meaningful, durable change.

Elevate performance, enhance your business operations and become ready to adapt and thrive during both business-as-usual and uncertain times. Adopt a far-reaching and impactful Workplace Experience strategy – which Teams can help you to enact.

Research undertaken by [MIT CISR](#) and [Avanade](#) shows companies that invest in a Workplace Experience strategy are able to:

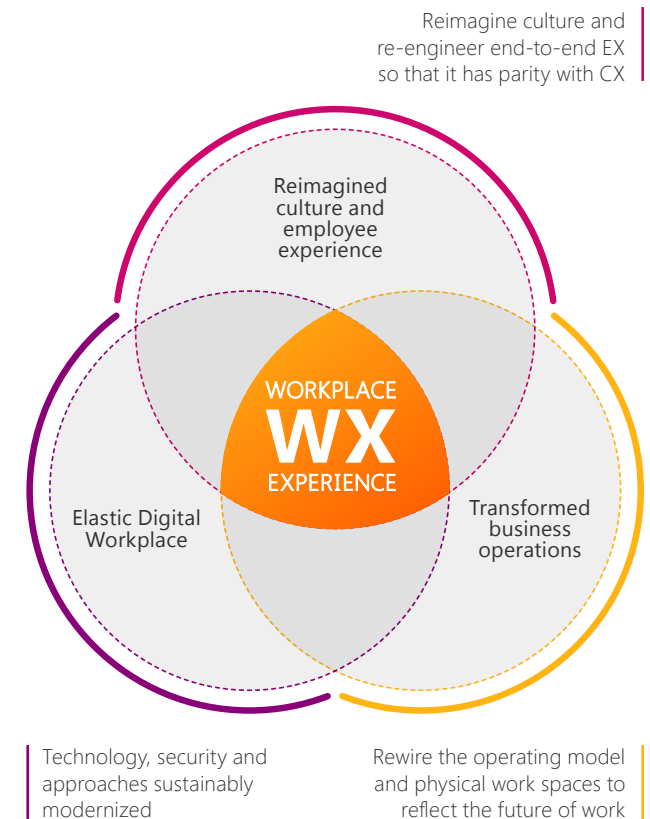
- *Increase profitability by 26%*
- *Halve the time to market for new products and services, generating new sales and revenues more quickly*
- *Double customer satisfaction scores*

The rewards are tangible

Companies making big leaps in Workplace Experience (WX) are seeing corresponding uplift across the business, with measurable improvements in growth, profitability, efficiency, innovation and customer experience. They're proving the power of WX and delivering results including:

- *16% potential boost to revenue*
- *13% anticipated reduction in operating costs*

For visionary business leaders, the opportunity is enormous. With Teams, alongside other platforms and broader approaches, you can realize that value.



Workplace Experience is a business transformation framework that drives sustainable value. It combines technology, operations, culture and employee experience in a holistic approach focused on cost efficiency, productivity and growth.

Further information

- [COVID-19 – we're here to help](#)
- [Microsoft Teams Rapid Deployment Resource Center](#)
- [Workplace Experience](#)

North America

Seattle
Phone +1 206 239 5600
America@avanade.com

South America

Sao Paulo
AvanadeBrasil@avanade.com

Asia-Pacific

Australia
Phone +61 2 9005 5900
AsiaPac@avanade.com

Europe

London
Phone +44 0 20 7025 1000
Europe@avanade.com

About Avanade

Avanade is the leading provider of innovative digital and cloud services, business solutions and design-led experiences on the Microsoft ecosystem. Our professionals bring bold, fresh thinking combined with technology, business and industry expertise to help make a human impact on our clients, their customers and their employees. We are the power behind the Accenture Microsoft Business Group, helping companies to engage customers, empower employees, optimize operations and transform products, leveraging the Microsoft platform. Avanade has 38,000 professionals in 25 countries, bringing clients our best thinking through a collaborative culture that honors diversity and reflects the communities in which we operate. Majority owned by Accenture, Avanade was founded in 2000 by Accenture LLP and Microsoft Corporation. Learn more at www.avanade.com

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