Microsoft Teams

Role-Specific Guide

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ENGINEERING - TRIAGE BUG RESOLUTION FOR DEVELOPMENT TEAMS

When software bugs and issues are reported by end users or identified by quality assurance (QA) testers, development teams need to quickly discuss technical details with team members and coordinate their resolution efforts. **Microsoft Teams** provides a chat-based workspace in Office 365 that allows team members to move quickly from conversations to content and tasks, with context, continuity, and transparency to the entire team. **Teams** enables real-time communications and rich collaboration between team members, so that bugs and issues can be resolved more efficiently. This guide will help you organize your team activities as you track software bugs and manage your development team using **Teams**, the chat-based workspace.

Once you've created your **Bug Resolution team** (or **channel**) in **Teams**, you can add some content so that your team members don't see a blank page the first time they log in. For example, you might **start a new conversation** by posting a few questions or topics in the **General** channel to get a discussion started and @mention specific team members to pull them into the conversation.

Team members can ask each other questions using **Conversations** and respond easily when they are online. The **Meet Now** feature in **Teams** allows team members to quickly meet on-the-fly – without having to schedule a meeting or reserve a conference room – using an interface optimized for face-to-face video chat. These features often reduce the need for in-person meetings, allowing for faster and more productive communication – particularly among geographically dispersed teams.

You can also connect to external content such as a bug tracking system, so that all relevant content is available in **Teams**, regardless of whether its source is an internal or external application or service. Here are some tabs you might use for your **Bug Resolution team**:

- Conversations can be used to discuss bugs and possible solutions using persistent chat, which allows team members to collaborate quickly, across time zones, and message each other – even when one party is temporarily unavailable. Conversations are automatically saved and can be reviewed at any time to help offline team members quickly get caught up and provide context.
- Files can be used to create, manage, and collaborate on documents and other artifacts, such as bug reports, release notes, and wireframes. You can also add tabs that link directly to specific files that will be frequently referenced by the team.
- Notes can be used for various meetings, brainstorming, and whiteboarding sessions between team members as they work toward resolution of a critical bug or issue. You can easily add photos and organize notes with different tabs inside OneNote.
- Other Services can be added to provide team members with easy access to important apps, services, and third-party content. For example, a **Visual Studio Team Services** tab or a tab that links to a web-based ticketing system, might be useful to team members.

ENGINEERING - CONDUCT VIRTUAL DAILY STANDUP MEETINGS

Daily standup meetings are a brief, but integral, part of the Agile Software Development project methodology. The format of the daily standup – an informal meeting among team members (lasting no more than 15 minutes) to discuss what's been done, what needs to be done, and what potential roadblocks exist – has been widely adopted by organizations for all types of projects.

Microsoft Teams provides a chat-based workspace in Office 365 designed to allow team members to move quickly from conversations to content and tasks with context, continuity, and transparency to the entire team. This guide will help you to conduct **Daily Standups** using **Teams**, the chat-based workspace.

Daily Standups can be run from an existing project team in **Teams**. The product manager or person running the daily standup can start the meeting directly from **Teams** by either scheduling a meeting or by using the Meet Now button. Team members can easily join and see each other using video optimized for face to face conversation. They can also chat in the meeting or access information needed for context during the meeting direct within **Teams**.

The right information and context is important for a successful **Daily Standup**. You can connect to external content such as an existing third-party task management system, development management software, bug tracking software, or Quality Assurance software so that all relevant content is available in **Teams**, regardless of whether its source is an internal or external application or service. Here are some helpful tabs that you might use for your **Daily Standup team**:

Conversations

The **Conversations** tab is where the Daily Standup would occur. It can also be used to discuss tasks using persistent chat, which allows team members to collaborate quickly, across time zones, and message each other – even when one party is temporarily unavailable. Conversations are automatically saved and can be reviewed at any time to help offline team members quickly get caught up and provide context.

Files

The **Files** tab can be used to create, manage, and collaborate on documents and other artifacts or project deliverables. You can also add tabs that link directly to specific files that will be frequently referenced by the team.

Notes

The **Notes** tab can be used for meeting minutes, brainstorming, and whiteboarding sessions. You can easily add photos and organize notes with different tabs inside OneNote.

Other

Other tabs that can be added include an existing SharePoint document library, Office document, PDF, website, Stream or Office 365 Video, PowerBI, or Planner.

ENGINEERING - EMPOWER DEVOPS WITH A CHAT-BASED WORKSPACE

DevOps requires real-time collaboration and communication between teams of software developers and other information technology (IT) professionals to enable rapid, frequent, and reliable software delivery and infrastructure changes. **Microsoft Teams** provides a chat-based workspace in Office 365 designed to allow team members to move quickly from conversations to content and tasks, with context, continuity, and transparency to the entire team, that can supplement existing DevOps tools.

DevOps teams are often comprised of people working around the world, making it challenging to keep everyone informed when fast-paced changes occur. This guide will help you organize your team activities as you prepare and manage your organization's budgets using **Teams** as a chat-based workspace. Some typical team-based DevOps activities might include:

- **Sprint Planning and Retrospectives**
- **Work Items**
- **Project Management**
- **Infrastructure and Operations (I&O)**

Once you've created your **DevOps team** in **Teams**, you can add a few channels and seed those channels with content so that your Team Members don't see a blank page the first time they log in. For example, you might **start a new conversation** to clarify a development task by posting a few questions or topics in each **channel** to get a few discussions started and @mention specific team members to pull them into the conversation. You can also connect to external content such as a third-party task management system (like Asana, Pivotal Tracker, or Trello), development management software (such as Visual Studio Team Services, GitHub, or JIRA), or links to developer forums, so that all relevant context is available in **Teams**, regardless of whether its source is an internal or external application or service. A few channels for a **DevOps team** might include:

Sprint Planning and Retrospectives Channel

This channel can be used for team activities associated with planning and executing the sprints associated with a specific software development project. **Planner** tabs can be easily added to items in the various backlogs and **Notes** tabs are helpful for Sprint Planning and Retrospective meetings. Under **Files**, you can add relevant documents such as:

- Sprint planning meeting notes
- Product backlog
- Sprint backlog
- Sprint retrospective meeting notes

Tip: You can also add tabs that link directly to specific files. This may be helpful for files that will be frequently referenced by the team.

Work Items Channel

This channel can be used to notify team members (using the Visual Studio Team Services connector), for example, when there is a change to a work item, when a build is completed, or when a release is scheduled. The persistent chat functionality in **Teams** allows team members to collaborate easily across time zones, and allows them to message each other – even when one party is temporarily unavailable. Under **Files**, you can add relevant documents such as:

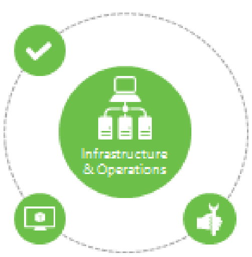
- Work item histories (these documents can be automatically pulled from Visual Studio Team Services)
- Use cases
- Sprint activity logs
- Release schedules

Project Management Channel

This channel can be used to collaborate on overall development project tasks and progress. Under **Files**, you can add relevant documents such as:

- Project schedule (via a connector tab, for example, to Microsoft Project)
- Release notes
- Project charter
- Business and technical requirements
- Statements of Work (SOWs)

Infrastructure and Operations (I&O) Channel



This channel can be used to track and manage infrastructure and operations issues related to the dev/test environments. DevOps enables rapid self-provisioning of system resources and deployment of new software to the production environment. However, close coordination among DevOps team members is essential to minimize downtime and mitigate potential security risks. Under **Files**, you can add relevant documents such as:

- Change Advisory Board (CAB) requests and approvals
- Dev/test environment configurations
- Deployment checklists
- Maintenance schedules

FINANCE - PLAN AND MANAGE DEPARTMENT BUDGETS

Budgets are used to exercise financial control within an organization. Budget planning requires extensive collaboration within and across departments throughout the organization. Budget management is a continuous process that occurs throughout the year. Both activities involve close communication, task management, coordination, and collaboration between department managers with fiduciary responsibilities and the finance department. **Microsoft Teams** provides a chat-based workspace in Office 365 designed to allow team members to move quickly from chats to content and tasks, with context, continuity, and transparency to the entire team. This guide will help you successfully organize your team activities as you prepare and manage your organization's budgets using **Teams**, the chat-based workspace.

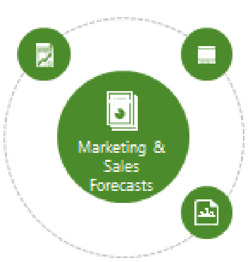
Some typical team-based activities associated with budget planning and management might include:

- **Marketing & sales forecasts**
- **Capital expenditures (CAPEX) budgets**
- **Operating expense (OPEX) budgets**
- **Budget reporting**

Once your team owner invites you to join the **Department Budget Planning & Management Team** in **Teams**, you can log in and familiarize yourself with how it is organized. Your team owner may already have created a few channels, such as the examples below, and added some content. Check under the **Conversations** and **Wiki** tabs to see if there are any discussions or topics that you need to participate in or questions that you need to answer for the team. There may also be connectors to external content such as a third-party task management system (like Asana, Pivotal Tracker, or Trello), an Excel spreadsheet template, or a PowerBI dashboard with financial data.

The following examples are channels that your team owner may have created for your team (**Tip:** Use the **General** channel to suggest creating any other channels that may be helpful to the **Department Budget Planning & Management team**):

Marketing & Sales Forecast Channel

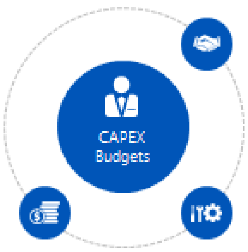


The budget process for every company will be unique, but often begins with a marketing and sales forecast. In addition to the marketing and sales budgets, these forecasts drive headcount, payroll, operations, and IT budgets, among others. The team responsible for preparing these forecasts must effectively communicate with company executives, research and development teams, product launch teams, production department managers, and others which can be done using **Conversations**. Important inputs and discussions for this team will include company financial goals, new product releases, product pricing or service billing rates, and marketing and sales plans. Under **Files**, you can work with relevant documents such as:

- Marketing and sales forecasts (quarterly or monthly)
- Product pricing or approved service billing rates

Tip: You can also add tabs that link directly to specific files. This may be helpful for files that will be frequently referenced by the team.

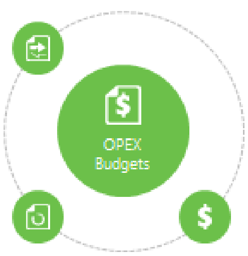
CAPEX Budgets Channel



This channel is used to create the CAPEX budgets for individual departments, which require extensive planning to ensure accurate budgeting for capital projects. Team members will need to prepare IRR, NPV, and/or ROI calculations (as appropriate) for proposed capital projects, and detailed budgets with price quotes for projects. Under **Files**, you can work with relevant documents such as:

- Prescriptive guidance for capital budgets
- Spreadsheets and templates (for example, IRR, NPV, and ROI)
- Capital projects bill of materials (BOM) and quotes
- Capital budgets (by department)

OPEX Budgets Channel



This channel is used to create the OPEX budgets for individual departments. Close coordination among team members and across departments is necessary to ensure the information is accurate, correct, and complete. **Conversations** help with coordination, and under **Files**, you can work with relevant documents such as:

- Prescriptive guidance for operating expense budgets
- Spreadsheets and templates
- Production & headcount forecasts
- Prior year operating expense budgets (if historical budgeting is used)
- Operating expense budgets (by department)

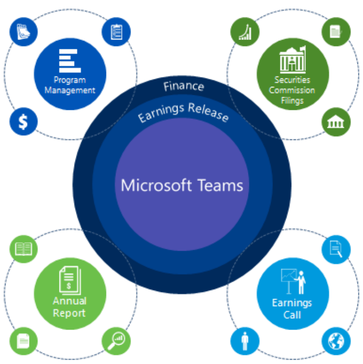
Budget Reporting Channel

Throughout the year, department managers must provide various budget performance reports to the finance department. **Conversations** can be used to get information from various individuals within the department and throughout the organization. A PowerBI dashboard can be added as a tab to display performance reports. Under **Files**, you can work with relevant documents such as:

- Approved department budgets
- Budget to actual comparisons
- Variance reports

FINANCE - GET READY FOR YOUR NEXT EARNINGS RELEASE!

Preparing for a successful earnings release requires close communication, task management, coordination, and content collaboration. **Microsoft Teams** provides a chat-based workspace in Office 365 designed to allow team members to move quickly from chats to content and tasks, with context, continuity, and transparency to the entire team. This guide will help you successfully organize your team activities as you prepare for your next earnings release using **Teams**, the chat-based workspace.



Some typical team-based activities associated with an earnings release in a public company might include:

- Creating the **Annual Report**
- Submitting **Securities Commission Filings**
- Conducting the **Earnings Call**
- Coordinating overall **Program Management**

Each of these activities involve different individuals, teams, and departments, all working together within firm deadlines.

Once your team owner invites you to join the **Earnings Release team** in **Teams**, you can log in and familiarize yourself with how it is organized. Your team owner may already have created a few channels, such as the examples below, and added some content.

Check under the **Conversations** and **Wiki** tabs to see if there are any discussions or topics that you need to participate in or questions that you need to answer for the team. There may also be connectors to external content such as a third-party task management system (like Asana, Pivotal Tracker, or Trello), Twitter feeds, or RSS news feeds.

The following examples are channels that your team owner may have created for your team (**Tip:** Use the **General** channel to suggest creating any other channels that may be helpful to the **Earnings Release team**):

Annual Report Channel

The team responsible for preparing the annual report must effectively communicate key company information with current and potential investors. Important inputs and discussions for this team will include the legal review, management statement to investors, financial forecasts, and other information. Under **Files**, you can work with relevant documents such as:

- Annual report (prior year)
- Quarterly reports (current year)
- Marketing toolkit
- Marketing brand guide

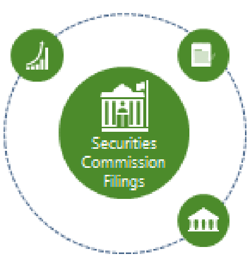
Tip: You can also add tabs that link directly to specific files. This may be helpful for files that will be frequently referenced by the team.

Earnings Call Channel

The earnings call requires extensive preparation in advance of the actual call. Team members will need to produce the earnings call slide deck, the call script, and the question and answer document, among others. Additionally, scheduling and invitations, press releases, and other important activities must be carefully coordinated, including numerous minute-by-minute activities that occur before, during, and after the call. Under **Files**, you can work with relevant documents such as:

- Earnings call slide deck
- Call script
- Call agenda
- Draft press releases

Securities Commission Filing Channel



This channel focuses on activities associated with mandatory securities commission filings, such as the collection of the financial data and audits, and preparation of the forms and reports to be submitted. Close coordination among team members is necessary to ensure the information is accurate, correct, and complete, and that it is submitted in accordance with all regulatory requirements. Under **Files**, you can work with relevant documents such as:

- Financial data tables
- Securities commission filings (previous years)
- Report templates
- Filing deadlines

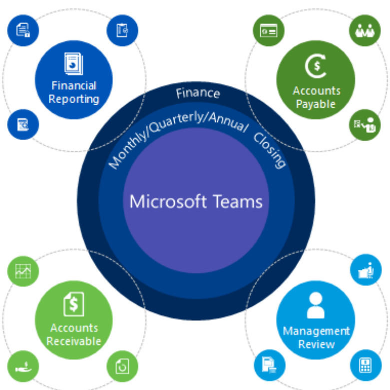
Program Management Channel

Within each of the other channels, each team is responsible for maintaining its own project tasks. However, program oversight is required to find critical path dependencies and maintain a master plan for the overall Earnings Release team. Under **Files**, you can work with relevant documents such as:

- Project charter
- Project plan
- Issues and risks logs

FINANCE - MANAGE YOUR MONTHLY/QUARTERLY/ANNUAL CLOSING

Efficient monthly, quarterly, and annual closing processes are critical to every business for the timely and accurate preparation of financial statements. These processes require departments throughout the organization to work together closely on a daily basis to ensure important tasks and reports are completed quickly and correctly. **Microsoft Teams** provides a chat-based workspace in Office 365 designed to allow team members to move quickly from chats to content and tasks, with context, continuity, and transparency to the entire team. This guide will help you successfully organize your team activities as you manage your organization's closing processes using **Teams**, the chat-based workspace.



Some typical team-based activities associated with monthly, quarterly, and annual closings might include:

- **Accounts Receivable (AR)**
- **Accounts Payable (AP)**
- **Financial Reporting**
- **Management Review**

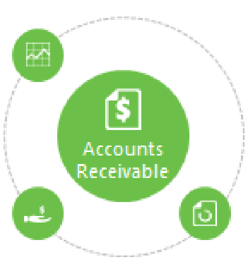
Each of these activities involve different teams working together throughout the various closing processes to ensure efficient and accurate financial reporting.

Once your team owner invites you to join the **Monthly, Quarterly, and Annual Closing Team** in **Teams**, you can log in and familiarize yourself with how it is organized. Your team owner may already have created a few channels, such as the examples below, and added some content.

Check under the **Conversations** and **Wiki** tabs to see if there are any discussions or topics that you need to participate in or questions that you need to answer for the team. There may also be connectors to external content such as a third-party task management system (like Asana, Pivotal Tracker, or Trello), Excel spreadsheet templates for easy access, or a PowerBI dashboard with financial data.

The following examples are channels that your team owner may have created for your team (**Tip:** Use the **General** channel to suggest creating any other channels that may be helpful to the **Monthly, Quarterly, and Annual Closing team**):

Accounts Receivable Channel



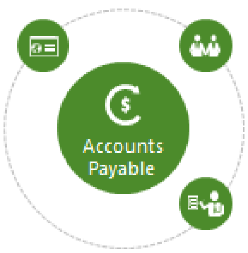
This channel is used to track team activities associated with collecting revenue from customers. The accounting system is used to create journal entries, but a great deal of collaboration between different departments, such as sales, operations, and customer service is required beyond the financial details of the transaction itself. Under **Files**, you can work with relevant documents such as:

- Pending transaction details
- Invoice information

- Customer information

Tip: You can also add tabs that link directly to specific files. This may be helpful for files that will be frequently referenced by the team.

Accounts Payable Channel



This channel is used to track team activities associated with paying invoices to vendors. Prior to an invoice being paid, a department or line of business (LOB) manager must typically approve the invoice, including verifying accuracy and receipt, as well as reconciling the invoice to a budget line item and purchase order. You can use **Conversations** to quickly answer questions (such as a question about a vendor or the accuracy of specific data). Under **Files**, you can work with relevant documents such as:

- Images of purchase orders and invoices
- Vendor information
- Vendor compliance guides

Financial Reporting Channel

This channel is used to prepare the various financial reports and create the financial statements for management review. Team members within the finance department may require additional information from their AR or AP counterparts, or from department and LOB managers about specific transactions, which can be accomplished using conversations. Under **Files**, you can work with relevant documents such as:

- General and subsidiary ledger reconciliations
- Trial balances
- Income statement
- Balance sheet

Management Review Channel

The team responsible for management review typically consists of the CFO and other senior finance managers that are not directly involved in the other parts of the closing processes. This process can be taken out of email into **Teams conversations** to facilitate quick collaboration. Under **Files**, you can work with relevant documents such as:

- Financial statements (preliminary)
- Income statements
- Supporting documentation (such as ledgers and spreadsheets)

MARKETING - MANAGE YOUR MARKETING EVENT WITH MICROSOFT TEAMS

Planning and executing a marketing event is a complex project that requires close coordination between different departments and teams. Successful marketing events are critical to the company brand and image because they are often public-facing events, such as customer appreciation events, new product launches, training seminars, and various conferences **Microsoft Teams** provides a chat-based workspace in Office 365 designed to allow team members to move quickly from chats to content and tasks, with context, continuity, and transparency to the entire team. This guide will help you successfully organize your team activities as you prepare for your next marketing event using **Teams**, the chat-based workspace.

Some typical team-based activities associated with event planning might include:

- **Budget**
- **Logistics and Scheduling**
- **Venue**
- **Budget**

Once your team owner invites you to join the **Event Planning team** in **Teams**, you can log in and familiarize yourself with how it is organized. Your team owner may already have created a few channels, such as the examples below, and added some content. Check under the **Conversations** and **Wiki** tabs to see if there are any discussions that you need to participate in or questions that you need to answer for the team. There may also be connectors to external content such as a third-party task management system (like Wunderlist or Trello), Twitter feeds, or RSS news feeds.

The following examples are channels that your team owner may have created for your team (**Tip:** Use the **General** channel to suggest creating any other channels that may be helpful to the **Event Planning team**):

Marketing Channel

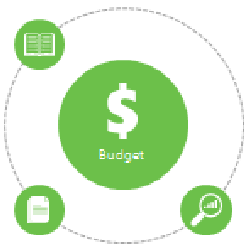
This channel can be used to plan activities, such as promoting the event, creating event collateral, planning the timing for marketing communications, and responses to event questions. The **Conversations** tab can be used to help with these tasks by providing up-to-the minute communication between team members. Connectors can be used to add relevant information to the **Conversations** tab, and can also be shared in chat and used to track event mentions. A few helpful tabs to use in this channel might include:

- Twitter connector (so you can follow specific accounts or hashtags related to your event)
- Facebook connector (so you can track and draft responses to wall posts and private messages)

- Files (Store and collaborate on drafts of marketing collateral or track attendees and sponsors in Excel spreadsheets)

Tip: You can also add tabs that link directly to specific files. This may be helpful for files that will be frequently referenced by the team.

Budget Channel



This channel can be used to track the event budget and actual expenses. Team members can use **Conversations** to post questions about purchase requests for a quick response, and quickly update other team members if cost contingencies emerge. Under **Files**, you can work with relevant documents such as:

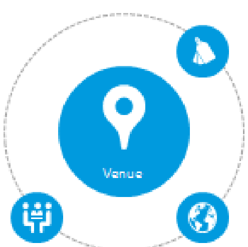
- Budget templates (to ensure that all budget documents stay consistent and accurate)
- Previous event budgets (for comparison)
- Purchase requests and authorizations
- Approved budget (actual budget document, which can be co-authored)

Logistics and Scheduling Channel

This channel can be used to ensure that all the various departments and teams stay in sync and on task with the logistics surrounding the event. Some features that may be useful to the **Event Planning team** include:

- A **Planner** tab to track, assign, and manage tasks
- A **Wiki** tab to store and share meeting minutes
- An **Excel** tab showing the setup/teardown schedules

Venue Channel



This channel can be used to track venue information. You can use relevant information such as:

- Venue Maps, in a **PDF** tab
- Venue Pricing, in the **Files** tab
- Venue contact information, in an **Excel** tab for easy access

Tip: Team members can easily access event planning information during the event via the **Teams** and **OneDrive** mobile apps.

MARKETING - GET READY FOR YOUR NEXT PRODUCT LAUNCH!

Developing an effective go-to-market (GTM) strategy for a new product or service launch requires communication, collaboration, task management, and coordination across diverse teams. Your GTM strategy is an action plan that will define, deliver, and communicate your unique value proposition to customers and help you achieve competitive advantage. **Microsoft Teams** provides a chat-based workspace in Office 365 to allow team members to move quickly from chats to content and tasks, with context, continuity, and transparency to the entire team. This guide will help you successfully organize your team activities as you prepare for your next GTM plan using **Teams**, the chat-based workspace.

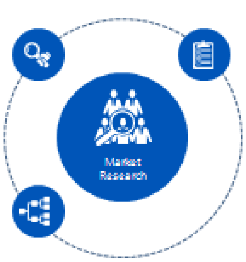
Some typical team-based activities associated with developing a GTM strategy might include:

- **Collecting and analyzing market research**
- **Developing messaging pillars**
- **Building communications plans**
- **Creating collateral materials**

Each of these activities involve different individuals, teams, and departments, all working together toward the product launch date.

Once your team owner invites you to join the **GTM team** in **Teams**, you can log in and familiarize yourself with how it is organized. Your team owner may already have created a few channels, such as the examples below, and added some content. Check under the **Conversations** and **Wiki** tabs to see if there are any discussions that you need to participate in or questions that you need to answer for the team. There may also be connectors to external content such as a third-party task management system (like Asana, Pivotal Tracker, or Trello), Twitter feeds, or RSS news feeds.The following examples are channels that your team owner may have created for your team (Tip: Use the General channel to suggest creating any other channels that may be helpful to the GTM team):

Market Research Channel

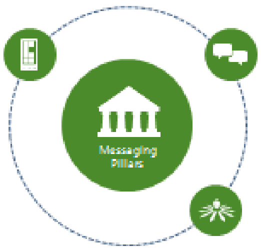


The team responsible for market research determines what research is needed and what resources are available to conduct the research. The team will then coordinate the various research activities and projects, including contracting and scheduling third-party survey and/or research services, if needed. Finally, the team collects, organizes, analyzes, and presents the research to other team members, as appropriate. Under **Files**, you can work with relevant documents such as:

- SWOT analysis
- Competitive research
- Focus group surveys and research results
- Syndicated research reports
- Value prop and messaging research

Tip: You can also add tabs that link directly to specific files. This may be helpful for files that will be frequently referenced by the team, for example the SWOT analysis.

Messaging Pillars Channel



The team responsible for developing messaging pillars uses the inputs from the Market Research channel to define the value proposition and identify the target market segment (positioning). They can ask other team members for supporting bullet points for the messaging pillars, for example, in the **Conversations** tab, or collaborate on documents with other team members. Under **Files**, you can work with relevant documents such as:

- Messaging framework
- Brand guide
- Creative guide

Communications Plan Channel

The team responsible for the communications plan focuses on all activities associated with the product or service launch including influencer outreach, promotion strategy, product documentation, and social media. This team can coordinate marketing campaigns using the **Conversations** tab, and manage all internal and external communications associated with the launch by having files in one location. Under **Files**, you can work with relevant documents such as:

- Social media plan
- Campaign creative
- Web page
- Customer mailing lists
- Draft press releases

Marketing Bill of Materials (BOM) Channel

The team responsible for the marketing bill of materials (BOM) manages the development, creation, and distribution of all marketing collateral associated with the product or service launch. Using inputs from the communications plan, this team can collaboratively produce all collateral materials in accordance with the brand and creative guides, and ensure that they are accurate and of acceptable quality. Under **Files**, you can work with relevant documents such as:

- Pitch decks, demo scripts, and FAQs
- Collateral materials budget
- Vendor lists
- Production schedules

MARKETING- PLAN AND MANAGE YOUR PUBLIC RELATIONS ACTIVITIES

Relevant news and information about companies, competitors, and industries, spreads quickly and can easily become viral across an ever-growing variety of media. An effective public relations team must be able to coordinate quickly and communicate in real-time among team members and with different company executives and departments, to ensure timely and accurate information is provided to customers, shareholders, and the public at large. **Microsoft Teams** provides a chat-based workspace in Office 365 designed to allow team members to move quickly from chats to content and tasks, with context, continuity, and transparency to the entire team. This guide will help you successfully organize your team activities as you plan and manage your public relations activities using **Teams**, the chat-based workspace.

Some typical team-based activities associated with public relations might include:

- Creating and collaborating on company **Press Releases**
- Collecting, reviewing, and sharing relevant **News and Updates**
- Verifying details and **Fact Checking** information, whether its source is internal or external

Once your team owner invites you to join the **Public Relations team** in **Teams**, you can log in and familiarize yourself with how it is organized. Your team owner may already have created a few channels, such as the examples below, and added some content. Check under the **Conversations** and **Wiki** tabs to see if there are any discussions that you need to participate in or questions that you need to answer for the team. There may also be connectors to external content.

The following examples are channels that your team owner may have created for your team (**Tip:** Use the **General** channel to suggest creating any other channels that may be helpful to the **Public Relations team**):

Press Releases Channel

This channel is used to create and store current and past company press releases. You can use **Conversations** to get alignment on key messages for upcoming press releases and share updates with the team. Under **Files**, you can work with relevant documents such as:

- Draft press releases (an easy way to review and co-author press releases)
- Press release guidelines (clear and concise rules for the team to follow when creating press releases)
- Brand templates (company branded press release templates)
- Historical press releases (these can be mined for content or referenced for questions and posterity)

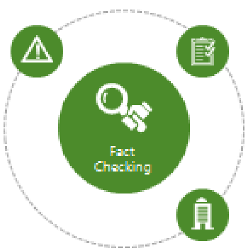
Tip: You can also add tabs that link directly to specific files. This may be helpful for files that will be frequently referenced by the team.

News and Updates Channel

This channel is used to share and comment on third-party news stories about your company, your product, your competitors, and your industry. Team members can use **Conversations** to discuss and share relevant stories with each other. You can also work with helpful **Connectors**, such as:

- Twitter (for example, you can follow specific accounts or hashtags, which will post updates to the **Conversations** area immediately or in a daily digest)
- Facebook (for example, receive updates when a new post is created on Facebook pages that you specify or when someone posts a new message to your page)
- Bing News (for example, a news digest can be posted once a day in the **Conversations** tab, based on keywords or topics you define)
- RSS Feed (for example, you can subscribe to any news source and post to the **Conversations** area when a new article is posted)

Fact Checking Channel



This channel is used to ensure that all information used in company press releases and marketing materials is factually accurate. Team members can use **Conversations** to ask each other questions and post answers, verify their facts and findings with subject matter experts inside the company, and help each other reference and cite reliable third-party sources. Under **Files**, you can work with relevant documents such as:

- Frequently Asked Questions (monitoring and maintaining an FAQ list ensures the PR team always has the correct answers available to them)
- Guidelines from your legal department (such as procedures for disputing factually inaccurate information published by third-party sources)
- Drafts of blog posts and other materials (which can be co-authored by subject matter experts)

SALES - PLAN AND COORDINATE ACCOUNT MANAGEMENT TEAM ACTIVITIES

Account management teams are often geographically dispersed, frequently travel, and work remotely at customer sites, which makes it challenging to communicate and collaborate with other team members when issues need to be discussed and decisions need to be made. **Microsoft Teams** provides a chat-based workspace in Office 365 designed to allow team members to move quickly from chats to content and tasks, with context, continuity, and transparency to the entire team. This guide will help you successfully organize your team activities as you plan and coordinate your account management activities using **Teams**, the chat-based workspace.

Some typical team-based activities associated with account management might include:

- **Customer News and Updates**
- **Current Engagements**
- **New Opportunities**
- **Sales Playbook**

Each of these activities involve different individuals, teams, and departments, all working together within firm deadlines.

Once your team owner invites you to join the **Account Management team** in **Teams**, you can log in and familiarize yourself with how it is organized. Your team owner may already have created a few channels, such as the examples below, and added some content. Check under the **Conversations** and **Wiki** tabs to see if there are any discussions that you need to participate in or questions that you need to answer for the team. There may also be connectors to external content such as a third-party task management system (like Asana, Pivotal Tracker, or Trello), Twitter feeds, or RSS news feeds.

The following examples are channels that your team owner may have created for your team (**Tip:** Use the **General** channel to suggest creating any other channels that may be helpful to the **Account Management team**):

Customer News and Updates Channels

Keeping abreast of the latest updates and changes in a customer's business and industry is pivotal for proactive, knowledgeable, and personalized customer relationship management. This could mean sharing news (both formal and informal) with your team in the **Conversations** tab, posting relevant articles and documents in the channel, or even connecting to a customer's Twitter feed. A few features that may be useful in this channel include:

- Twitter Connector (for example, you can follow your customers' accounts or hashtags related to your customers)
- Facebook Connector (track your customers' Facebook accounts and receive updates when new things are posted)

- Bing News (subscribe to news using your customers' names to get news updates in the **Conversations** tab

Tip: You can also add tabs that link directly to specific files. This may be helpful for files that will be frequently referenced by the team.

Current Engagements Channel

This channel can be used to collaborate and communicate with other team members about potential issues and information affecting current opportunities with customers, so the account manager always has the latest information. The **Conversations** tab allows account managers and project managers to quickly share information and resolve issues. Under **Files**, you can add relevant documents such as:

- Decks for Account Reviews of current engagements
- Status reports needed at the account level

New Opportunities Channel

This channel can be used to collaborate and communicate with other team members about potential opportunities with customers. Some items that may be useful in this channel include:

- Dynamics 365 or SalesForce Connector (use this connector to automatically post to **Conversations** when an opportunity is updated)
- Account Managers can pass along information to project leaders about account level changes that may present new opportunities

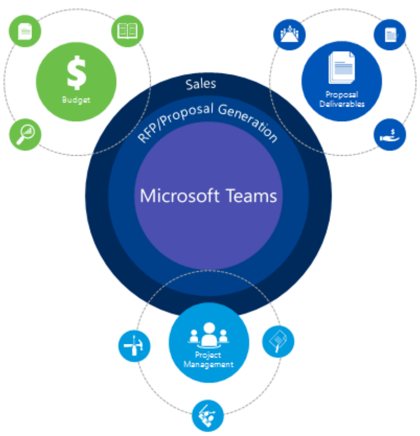
Sales Playbook Channel

This channel is used to develop and collaborate on the creation of resources for the sales playbook. Team members can discuss, for example, service offerings, competitor strategies, and sales tips and advice. These conversations will be accessible on a mobile device using the **Teams** app. Under **Files**, you can add relevant documents such as:

- Positioning guides and battle cards
- Sales methodology and training presentations
- Marketing brochures
- Approved customer references and case studies

SALES - PREPARE AND MANAGE YOUR NEXT RFP/PROPOSAL GENERATION

Organizations frequently generate Requests for Proposals (RFPs) or respond to RFPs from prospective customers. Whether generating the RFP or responding to an RFP, the process involves many departments throughout the company working together to compile relevant questions or responses and supporting documentation. The team must meet firm deadlines and either obtain sufficient information about a proposal to choose the best partner, or draft a winning response and earn a customer's future business. **Microsoft Teams** provides a chat-based workspace in Office 365 designed to allow team members to move quickly from chats to content and tasks, with context, continuity, and transparency to the entire team. This guide will help you successfully organize your team activities as you prepare for RFP/proposal generation using **Teams**, the chat-based workspace.



Some typical team-based activities associated with RFP/proposal generation might include:

- **Project Management**
- **Proposal Deliverables**
- **Budget**

Once your team owner invites you to join the **RFP/Proposal Generation team** in **Teams**, you can log in and familiarize yourself with how it is organized. Your team owner may already have created a few channels, such as the examples below, and added some content. Check under the **Conversations** and **Wiki** tabs to see if there are any discussions that you need to participate in or questions that you need to answer for the team. There may also be connectors to external content such as a third-party task management system (like Asana, Pivotal Tracker, or Trello), Twitter feeds, or RSS news feeds.

The following examples are channels that your team owner may have created for your team (**Tip:** Use the **General** channel to suggest creating any other channels that may be helpful to the **RFP/Proposal Generation team**):

Project Management Channel

This channel is used to ensure that all the various departments and teams stay coordinated on creating the RFP or response, so that it can be submitted in a timely and accurate manner. You can use a **Planner** tab to track and assign tasks so everyone understands what they are responsible for completing. Under **Files**, you can work with relevant documents such as:

- Documents and deliverables requiring review
- Responsibility assignment matrix (Responsible, Approve, Consult, Inform – or RACI)

Tip: You can also add tabs that link directly to specific files. This may be helpful for files that will be frequently referenced by the team.

Proposal Deliverables Channel

This channel is used to compile the different components and deliverables required for a complete and accurate RFP or response. Under **Files**, you can work with relevant documents such as:

- The RFP and/or response document
- Submission guidelines and deadlines
- Customer requirements (business and technical)
- Legal, contractual, and insurance documents
- Regulatory compliance or industry certifications (such as ISO), if applicable
- Information technology documentation (such as network diagrams, security policies, disaster recovery and business continuity plans)
- Product or work samples
- Relevant case studies (for RFP responses)
- Approved customer success stories or references
- Company profile and leadership bios (for RFP responses)
- Company 10-K, 10-Q, and annual reports (for RFP responses)

Budget Channel

This channel is used for all budgeting activities associated with generating the RFP or response. You can use **Conversations** to discuss the types of tasks that will need to be accomplished, what resources will be required for the tasks, and pricing information for the customer. You can also work with relevant information such as:

- A budget spreadsheet (displayed as a tab)
- Conversations (about the tasks needed to perform the work)
- Scheduling and resource information
- Historical budget information from similar projects (for reference)

SALES - PREPARE AND MANAGE YOUR SALES PLANNING TEAM ACTIVITIES

Sales activities such as sales planning, pipeline management, and business reviews include a broad cross section of sales leadership, account managers, marketing, product specialists, product engineers, and research and development. **Microsoft Teams** provides a chat-based workspace in Office 365 designed to allow team members to move quickly from chats to content and tasks, with context, continuity, and transparency to the entire team. This guide will help you successfully organize your team activities as you plan sales, manage your sales pipeline, and review business using **Teams**, the chat-based workspace.

Some typical team-based activities associated with sales planning activities might include:

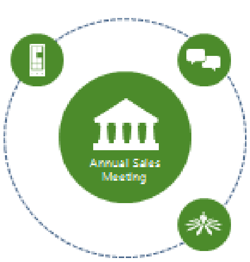
- **Annual Sales Meeting**
- **Quarterly Business Review**
- **Monthly Sales Pipeline Review**
- **Sales Playbook**

Once your team owner invites you to join the **Sales Planning team** in **Teams**, you can log in and familiarize yourself with how it is organized. Your team owner may already have created a few channels, such as the examples below, and added some content.

Check under the **Conversations** and **Wiki** tabs to see if there are any discussions that you need to participate in or questions that you need to answer for the team. There may also be connectors to external content such as a third-party task management system (like Asana, Pivotal Tracker, or Trello), Twitter feeds, or RSS news feeds.

The following examples are channels that your team owner may have created for your team (**Tip:** Use the **General** channel to suggest creating any other channels that may be helpful to the **Sales Planning team**):

Annual Sales Meeting Channel



This channel can be used to plan, coordinate, track, and execute the annual sales meeting. During the annual sales meeting, numerous simultaneous events will be happening at a rapid pace, requiring real-time communications and collaboration between team members working together to pull off a successful event. Team members will need to quick converse with one another, and will need access to various resources and documents, which you can easily work with under **Files**, such as:

- Meeting agendas and event schedules
- Presentations, brochures, and meeting materials

- Vendor information

Tip: You can also add tabs that link directly to specific files. This may be helpful for files that will be frequently referenced by the team.

Quarterly Business Review Channel

This channel is used to coordinate team activities preparing for the quarterly business review. Team members will often need to provide updates on opportunities and deal closings up to the last minute. You can work with relevant information in channel, such as:

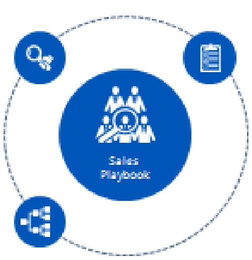
- Forecast to actual sales information, as a **PowerBI** dashboard tab
- Team sales reports, in the **Files** tab
- The quarterly review schedule, can be in an **Excel** sheet, displayed as a tab

Monthly Sales Pipeline Review Channel

This channel is used to plan, track, and review monthly sales activity based on leads and opportunities in the sales pipeline. Sales team members can easily communicate with each other regarding important up-to-the minute information such as customer business news, customer service issues (for example, that an account manager needs to be aware of prior to a customer meeting), and lead status changes (hot/cold). You can work with relevant information in this channel, such as:

- Reports for past month’s sales, as a **PowerBI** dashboard tab
- Sales team presentations, in the **Files** tab
- Opportunity plans for specific deals, posted in **Conversations** as opportunities and automatically imported from CRM

Sales Playbook Channel



This channel is used to develop and collaborate on the creation of resources for the sales playbook. Team members can discuss, for example, service offerings, competitor strategies, and sales tips and advice. These conversations will be available from a mobile device using the Teams App. Under **Files**, you can work with relevant documents such as:

- Positioning guides and battle cards
- Sales methodology and training presentations
- Marketing brochures
- Approved customer references and case studies