



Microsoft Teams for Project Management

Microsoft Teams





In this playbook...

Find out how Microsoft Teams can enable personas across every major function and role in your organization to effectively navigate through daily high value scenarios with ease and confidence.

Strategy

- Collaborate with Sales & Marketing
- Analyzing Market Trends to Perform Better
- Strategizing the Way Forward



Planning

- Set Up an Environment to Collaborate
- Cost Estimation and Budget Planning
- Planning Project Timelines and Resources





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Find out how Microsoft Teams can enable personas across every major function and role in your organization to effectively navigate through daily high value scenarios with ease and confidence.

Implementation

- Managing Reports and Project Documents
- Identify High Priority Tasks and Unblock Workstreams



Meetings & Coordination

- Keep a Project Team In Sync and Well-informed
- Manage Multiple Meetings with Ease
- Ensure Efficient Daily Standups and Project Overview
- Create Agendas and Record Meeting Decisions





Strategy

Check out how the Project Management team can use Microsoft Teams to keep your business running efficiently and address unexpected situations with confidence.

Project Management Superpowers in Teams

Capabilities and features used...

- Schedule meetings using synced calendars, or a meet now feature
- Participate in instant, open-channel communication
- Store documents within a cloud-enabled repository using Files section or channel tabs
- Create and co-author documents, spreadsheets, presentations and more in the cloud with Office 365
- Channel tabs for everyone to stay on the same page
- Help safely collaborate with teammates on multiple projects from within a single environment

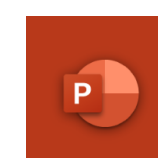
Apps that enable an immersive experience in Teams



Word



Excel



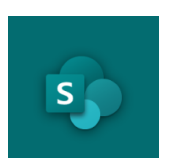
PowerPoint



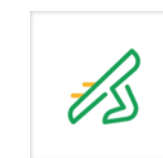
Ment.io



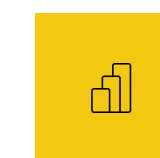
Lucidchart



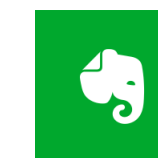
SharePoint



Zoho Sprints



Power BI



Evernote



Asana



Calendar
BOT



Kudos
Boards



Approvals



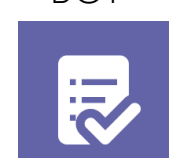
Freehand by
InVision



Zoho
Projects



Lists



Tasks by
Planner
and To Do



Workstreams.ai

Meet the Business Decision Makers

Project Management



Project Manager

"Being a Project Manager is like being an artist, you have different colored process streams combining into a work of art."

- Monitor the progress of work and assign task to employees
- Ensure on time delivery of the project
- Ensure minimum or zero bugs in the final document
- Escalate any risk or delays that can impact the project



Market Analyst

"If you believe there is a better way, take the next step in exploring your potential."

- Forecast and monitor sales trends
- Gather consumer and competitor data
- Prepare reports for management
- Utilize statistical software for data analysis



Project Coordinator

"Make every interaction count,, even the small ones. They are all relevant."

- Supervise current projects and coordinate all team members to keep workflow on track
- Manage team goals, project schedules and new information
- Manage paperwork by ensuring all necessary materials are current, properly filed and stored



Collaborate with Sales & Marketing

Project Manager

Scenario Walkthrough

The newly launched products have been performing exceptionally well, and the company sees the need to seize the opportunity to increase the marketing spend. The Project Manager needs to communicate with the marketing and sales team to analyze purchase trends, coordinate the creation of a marketing plan, and send it for approval. Microsoft Teams helps the Project Manager to seamlessly leverage tools to communicate, analyze, and review all in one platform.

- Schedules a channel meeting with the Sales and Marketing team members to discuss the task at hand.
- Reviews a dashboard showing the purchase trends for the last quarter using Power BI.
- Reviews the marketing strategy shared by the Marketing Manager using PowerPoint.
- Views the ideas shared by the marketing team during their brainstorming session with Lucidchart.
- @mentions the Finance Manager and interacts with him to ask for approval on the marketing budget.

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

- Hold meetings using Microsoft Teams to keep everyone informed & aligned.
- @mention feature helps keep track of essential conversation that requires attention or response.
- Create and analyze data with rich visual representations using Power BI.
- Collaborate on diagrams directly in a channel tab using Lucidchart.
- Build reports, documents, and presentations online in the cloud with PowerPoint.

Which app integrations on Teams made it possible?



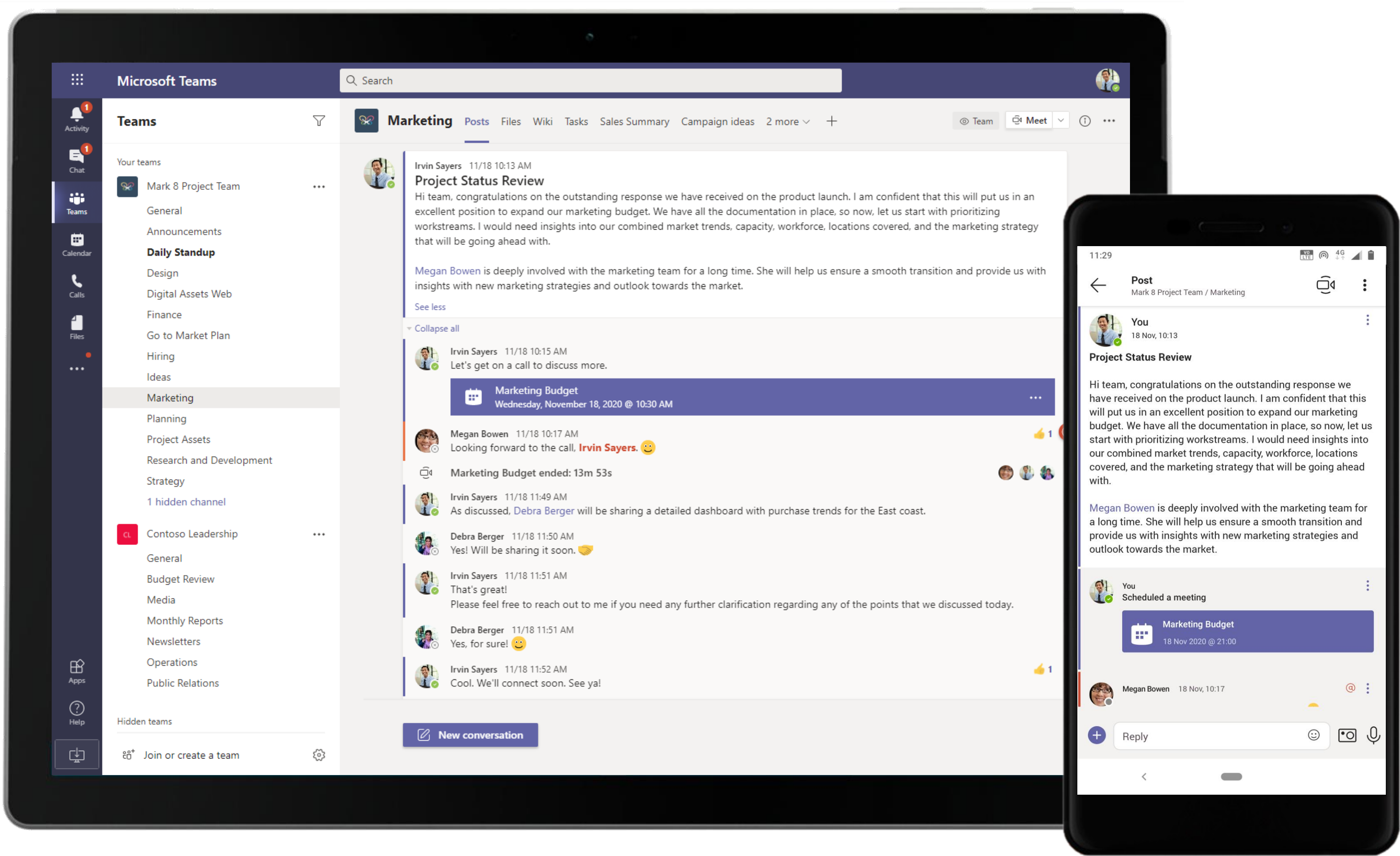
Lucidchart



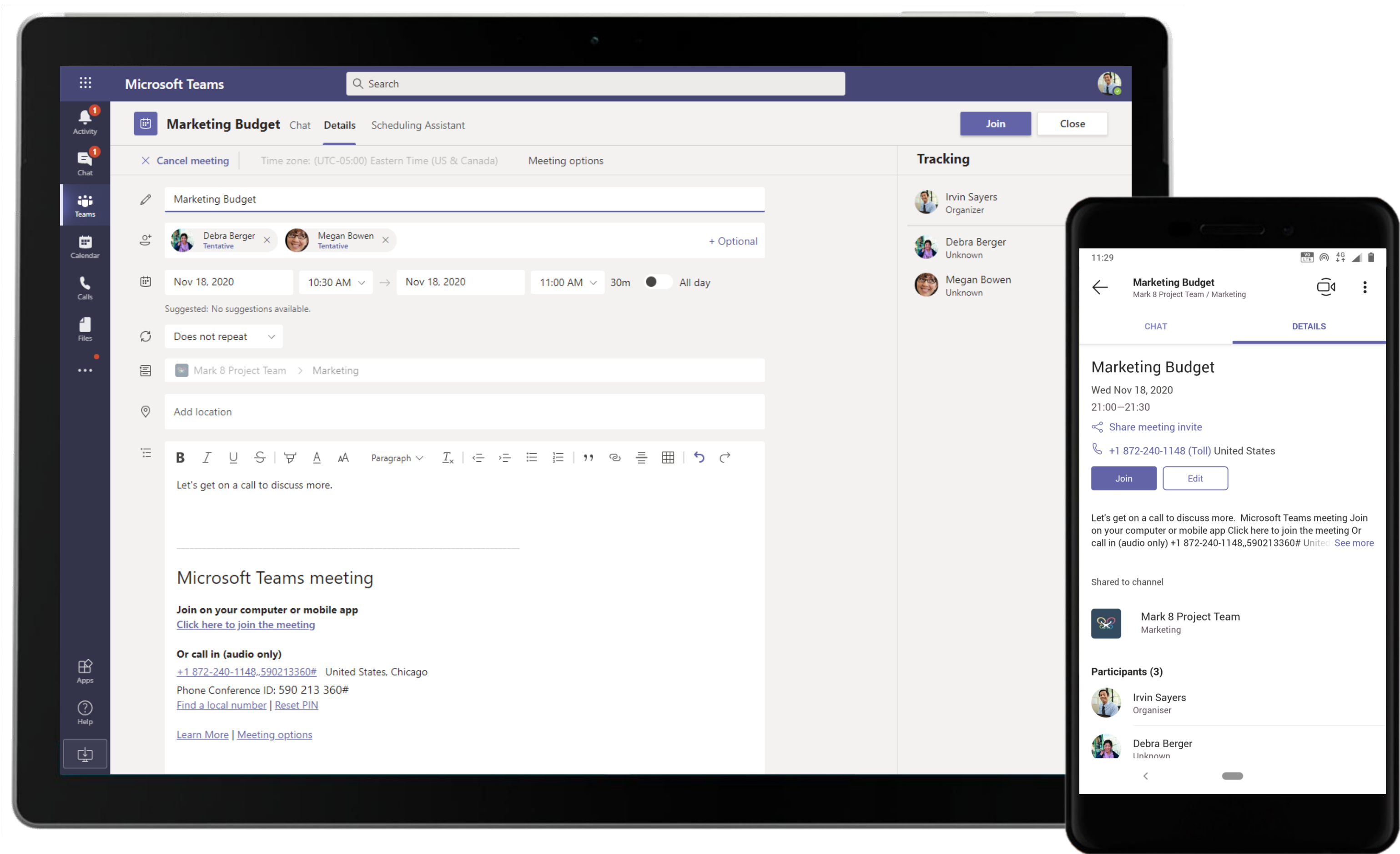
PowerPoint



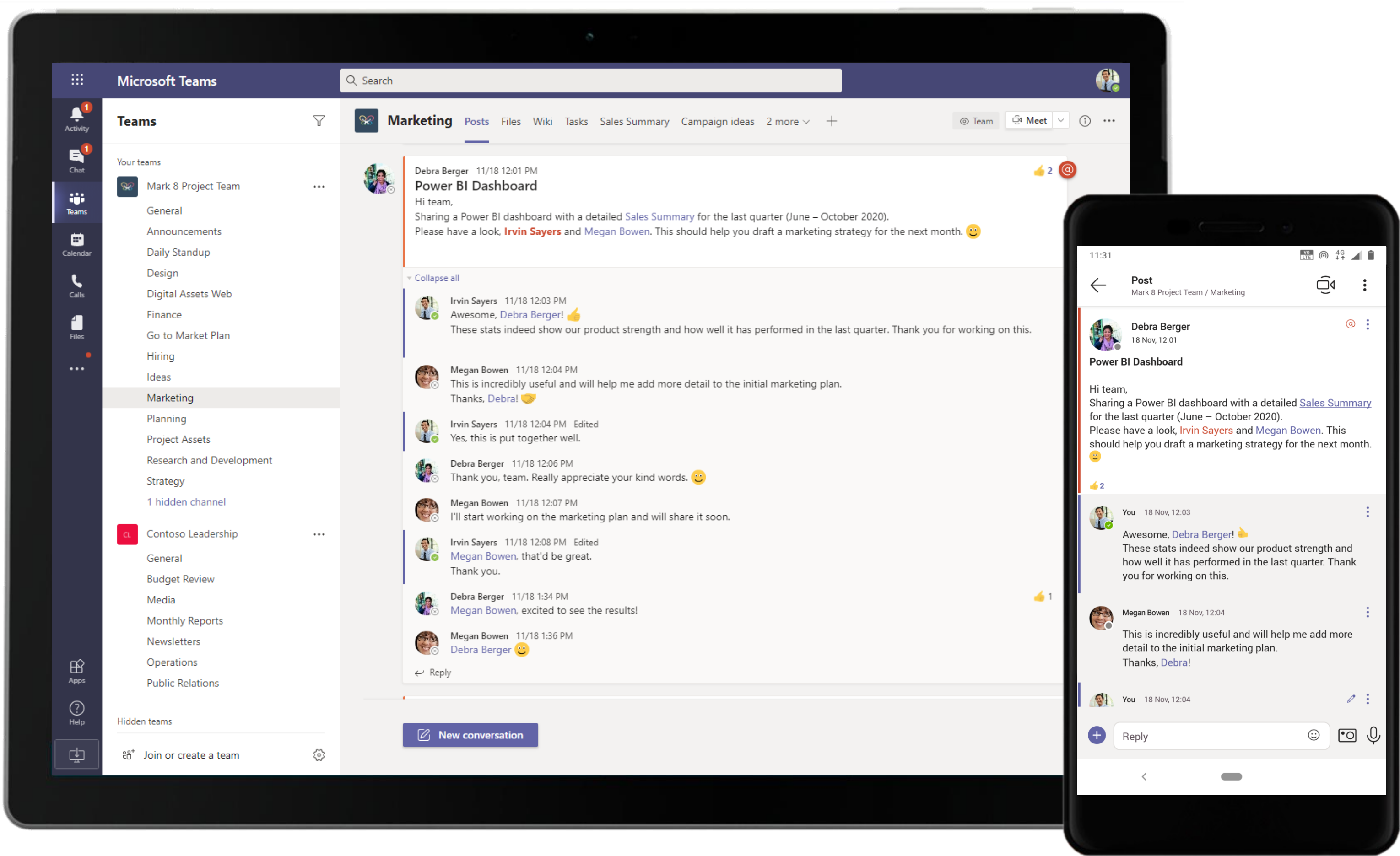
Power BI



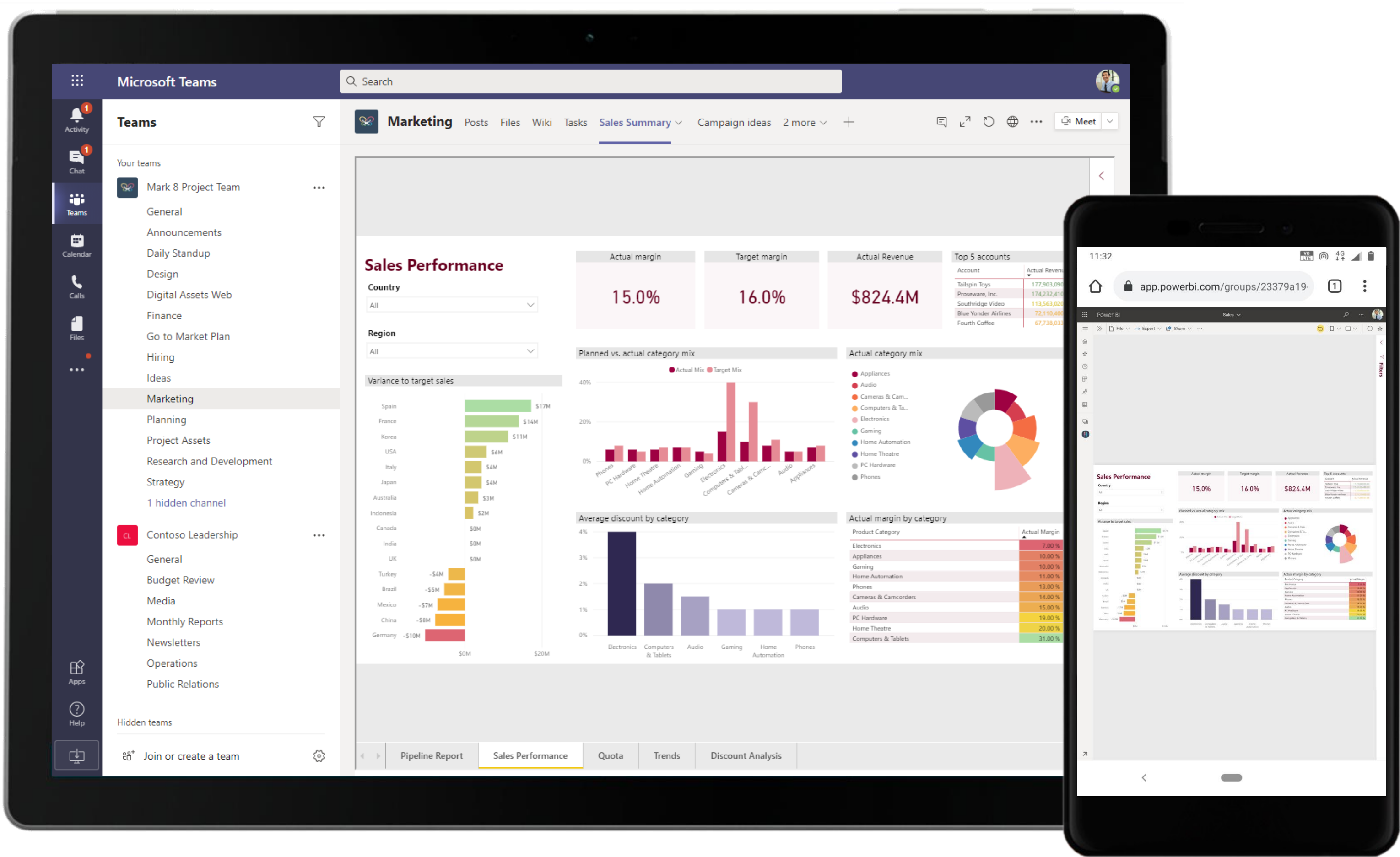
A project status review meeting is scheduled with essential participants in the loop. Scheduling a meeting in the channel serves as an open invite for other interested team members to participate and offer inputs.



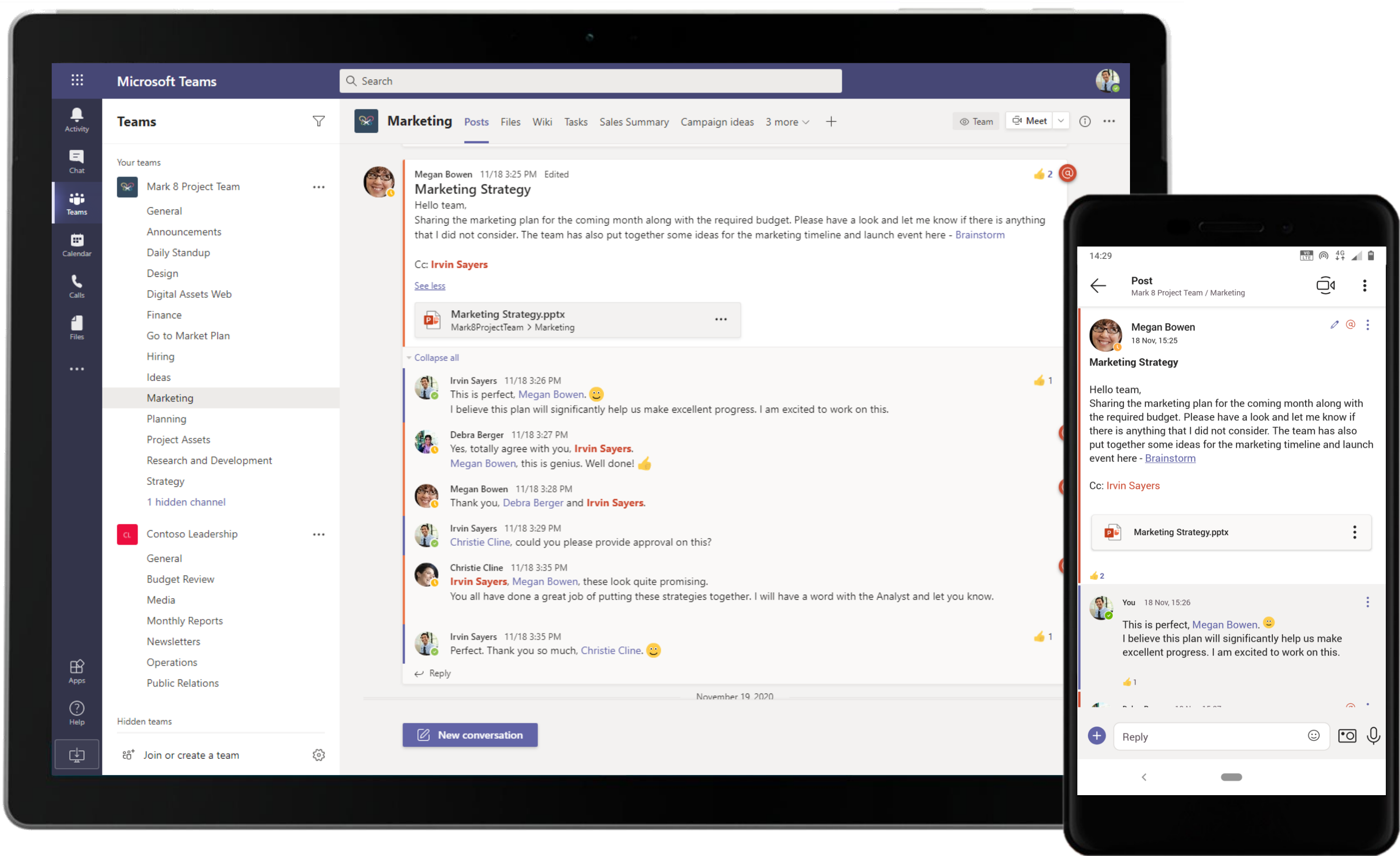
Hold calls and conferences and share screens with enterprise security. Using the Scheduling Assistant feature, the Associate can choose an optimal meeting time for all attendees.



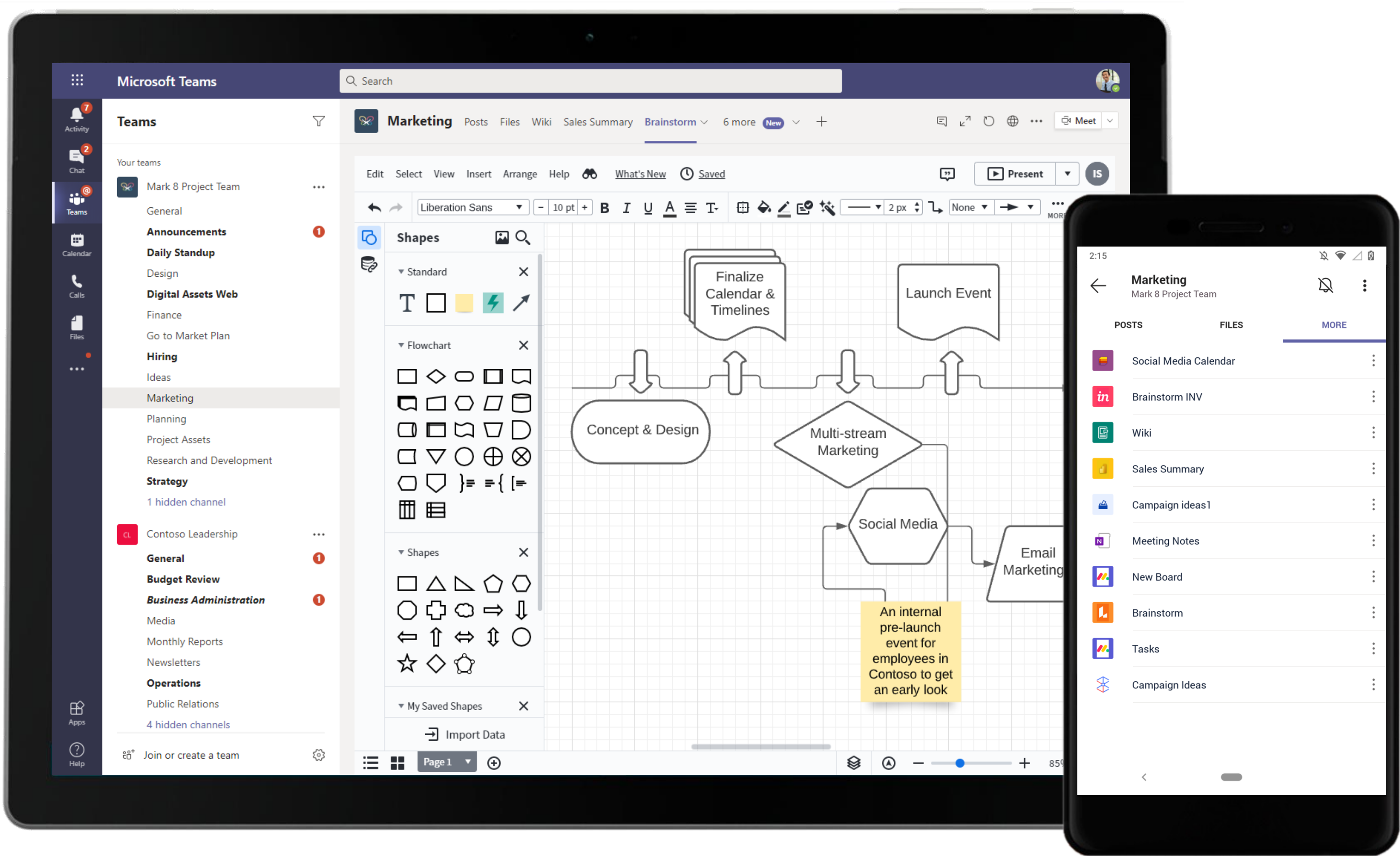
The Marketing Manager schedules a meeting in the channel to draft a marketing strategy, roping in relevant team members to help with budget planning. She uses the @mention feature to call their attention to her post, which also sends out a notification in their Activity Feed.



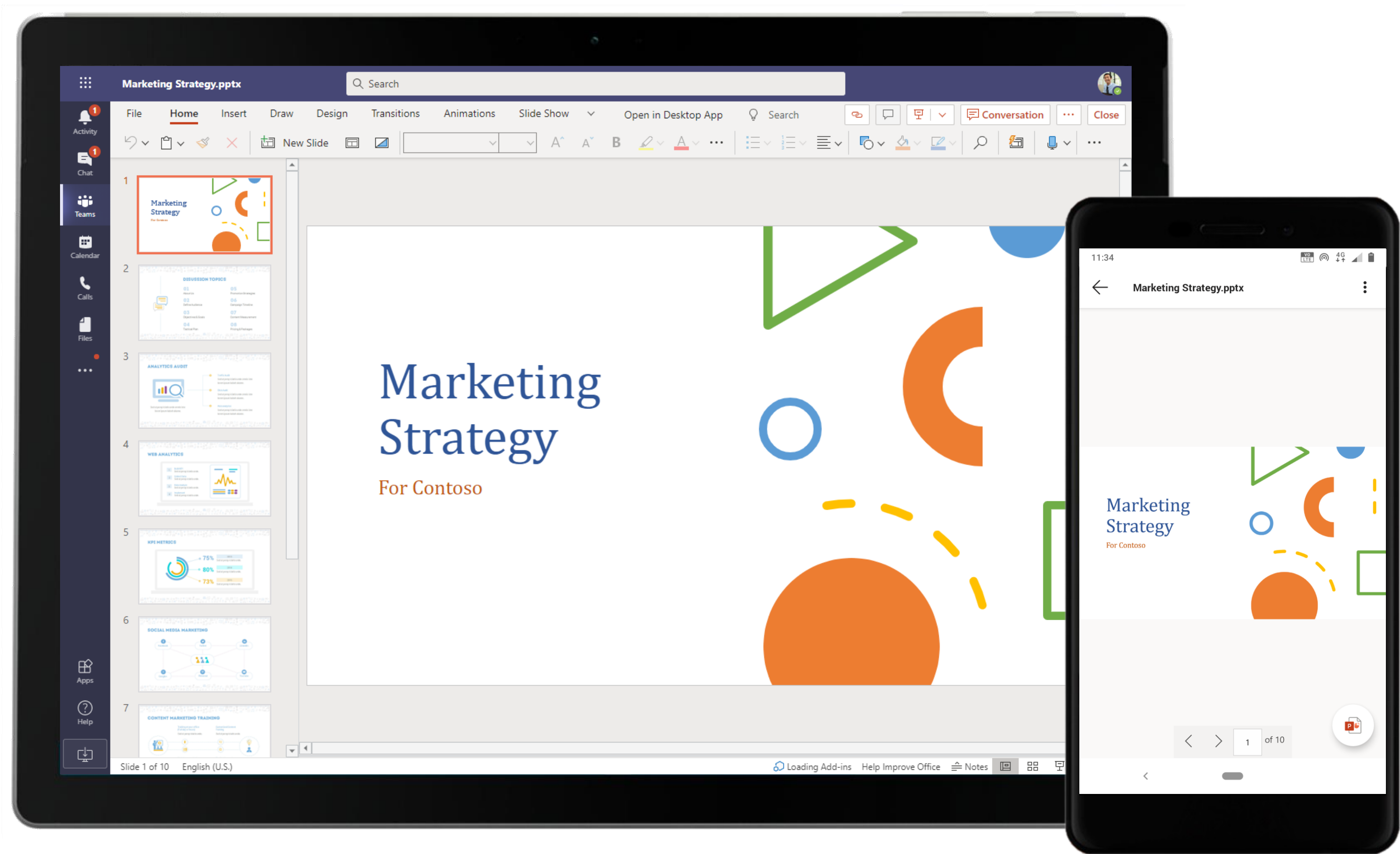
Build dynamic data visualizations, measure metrics, and track analytics through Power BI within Teams. The Marketing Manager can dive into this wealth of analytical data shared using Power BI.



Channel conversations can contain a lot things – conversations, files shared by team members, meeting threads, and GIFs! Use social features like reacting to team members’ conversations and responses to acknowledge them.



Collaborate on flowcharts, org charts, and other visuals in real time. The Project Manager views the ideas shared by the Marketing team during their brainstorming session via Lucidchart.



Create and share PowerPoint presentations over a Teams call to make meetings meaningful and to offer attendees a visual representation of key points covered.



Analyzing Market Trends to Perform Better

Project Manager with Market Analyst

Scenario Walkthrough

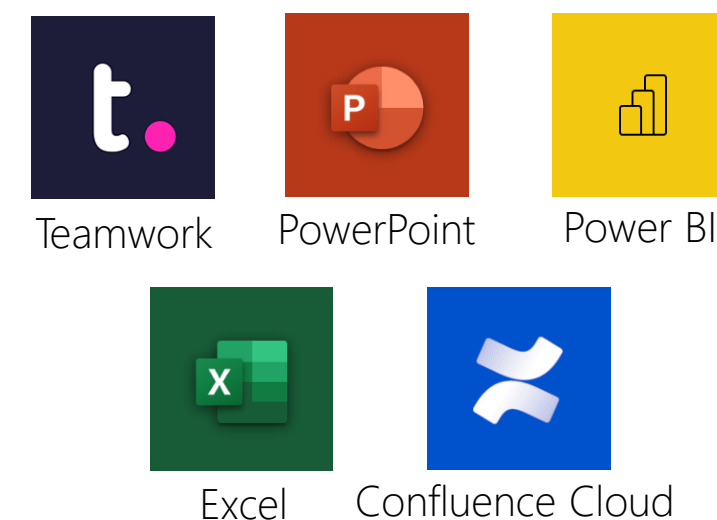
As the Contoso team works on the development of the project, it must also stay abreast of the prevailing trends and be aware of what lies in the future. For this, the Market Analyst needs to prepare a report and share it for reference with the Project Management, Marketing, and Sales team. This helps the team understand the customer base they're targeting and positions them to create products and services of value.

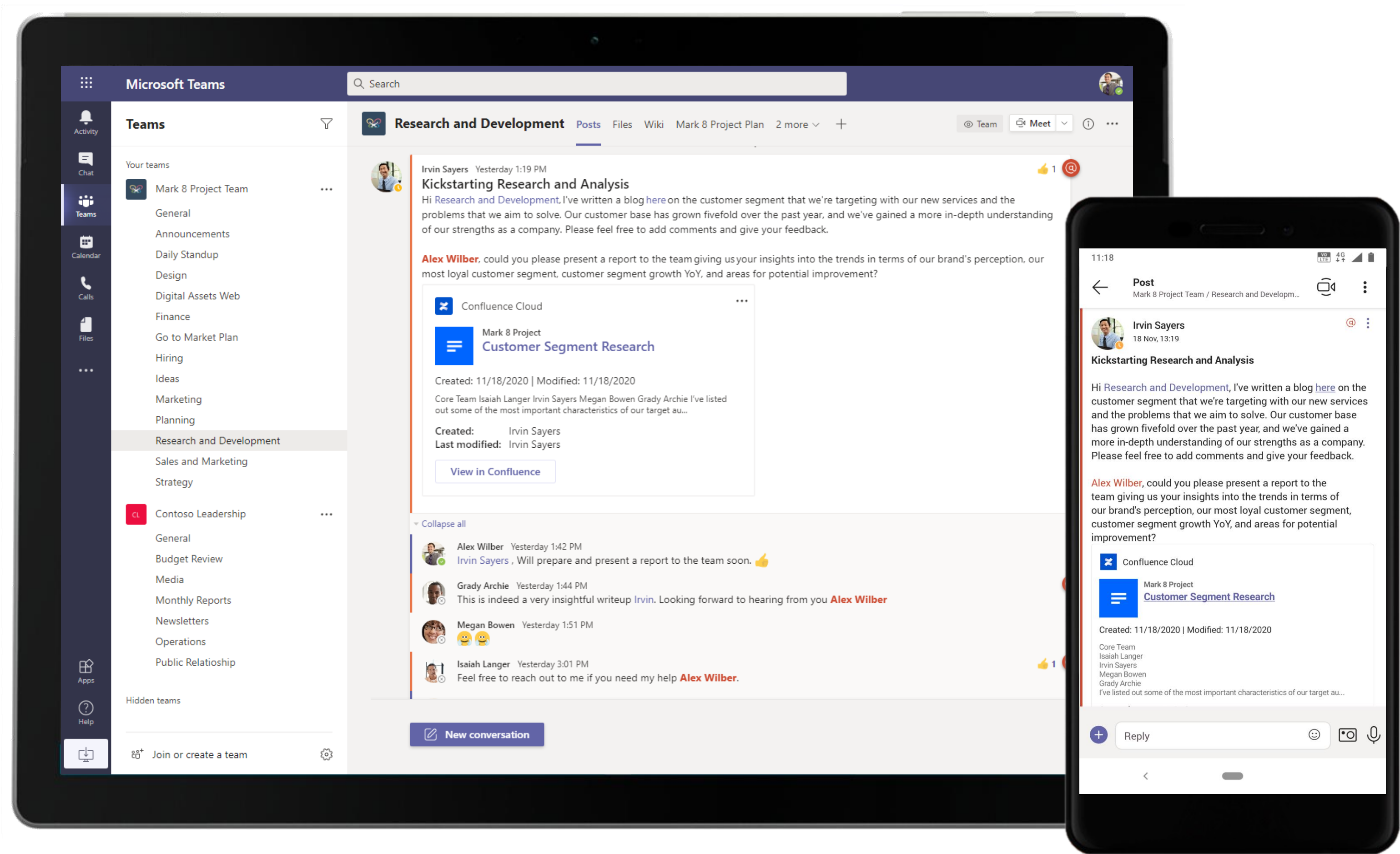
- Receives notification from the Project Manager regarding a market analysis that needs to be conducted.
- Views a Confluence Cloud blog shared by the Project Manager with the team within a channel tab.
- Reaches out to the Business Analyst to receive additional data regarding products sold by region via 1:1 chat.
- Shares analysis and findings with the entire team using PowerPoint for Microsoft Teams.
- Revisits meeting minutes to refer important project details using Teamwork.
- Pins a tab within the channel for easy access to reports using Power BI.

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

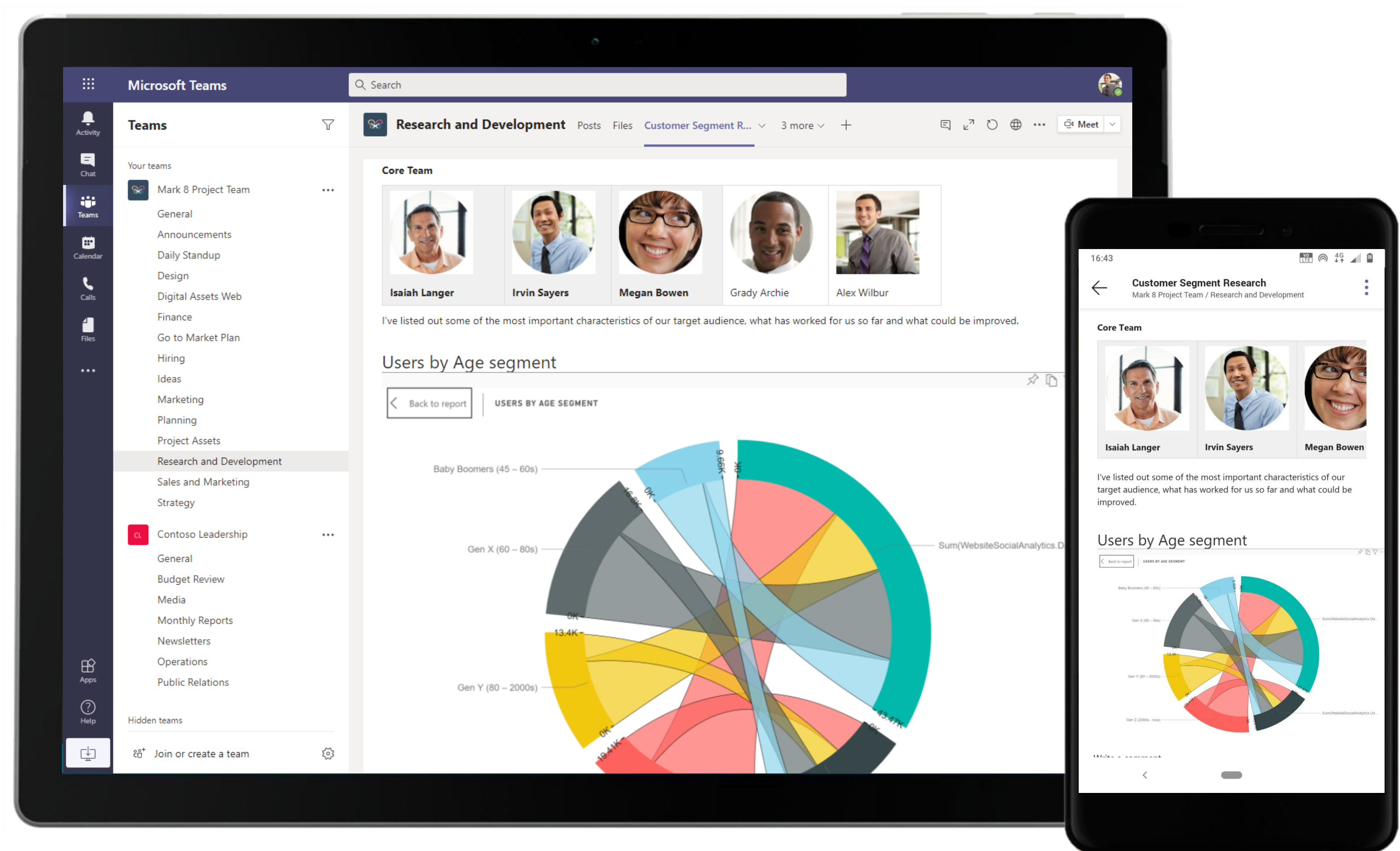
- Create, collaborate and organize all your work in one place using Confluence Cloud.
- Build reports, documents, and presentations online in the cloud with Excel and PowerPoint'
- Keep you team updated of crucial project information by adding notebooks using Teamwork.
- Analyze and share data with rich visuals using Power BI for Microsoft Teams.

Which app integrations on Teams made it possible?

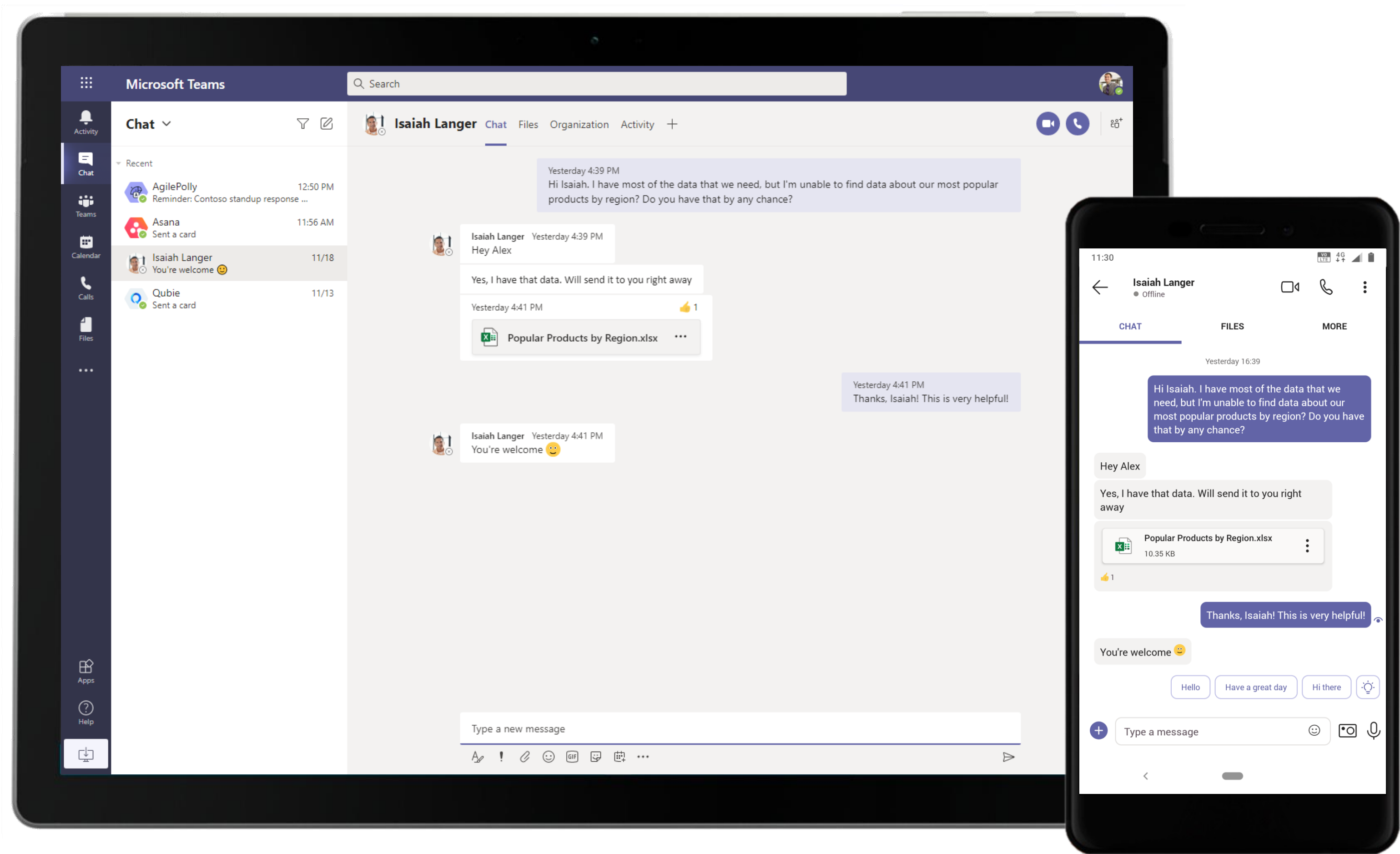




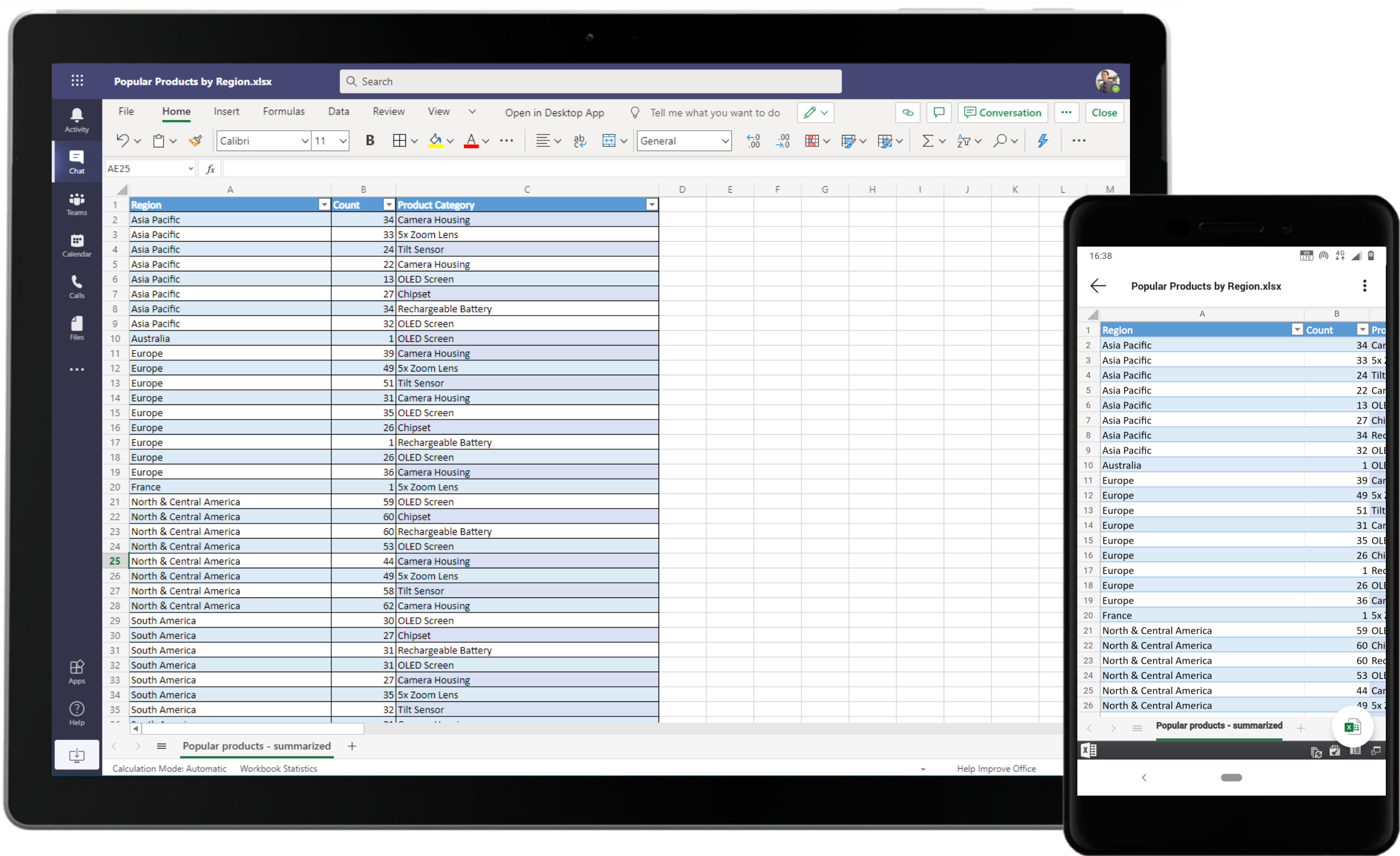
Confluence Cloud is a collaboration tool that helps you to create, organize and discuss work with your team. The Project Manager shares a Confluence Cloud blog with the team and seeks market research from the Market Analyst.



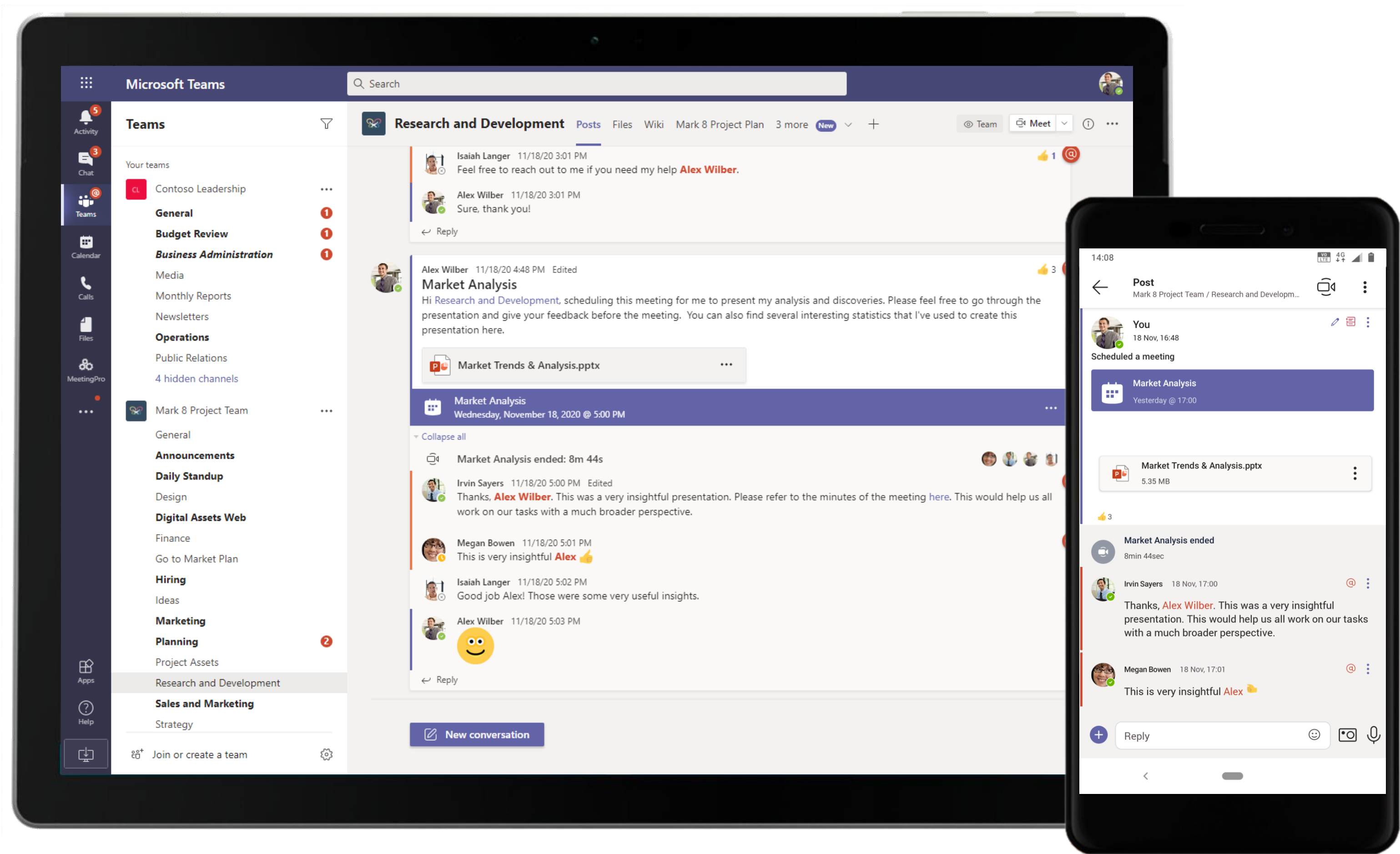
Create, organize, discuss work. Create and manage project documentation using Confluence Cloud.



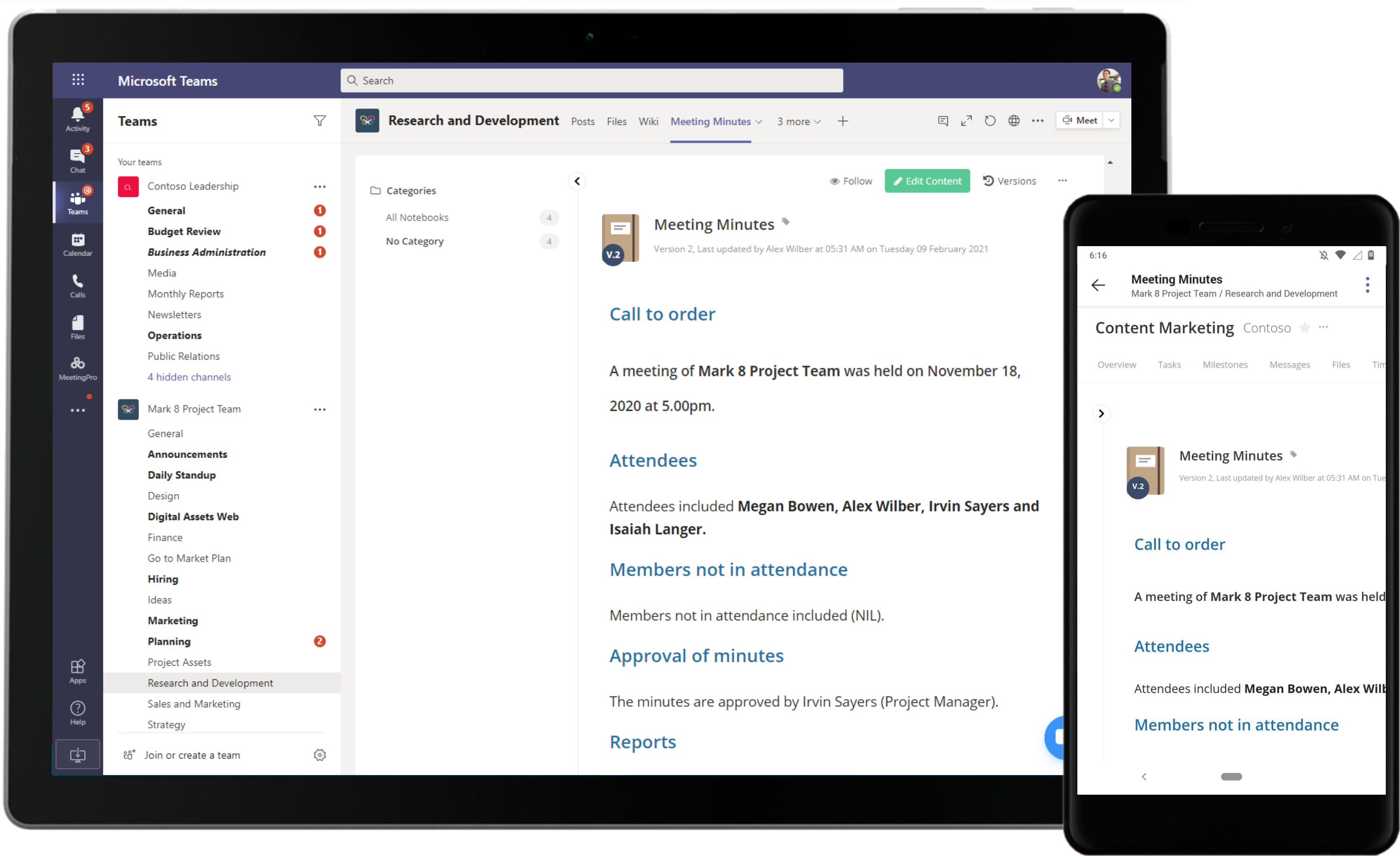
Quickly reach out to and chat with co-workers. Take conversations offline from channels for 1:1 discussions, just like the conversation here between the Market Analyst and the Business Analyst.



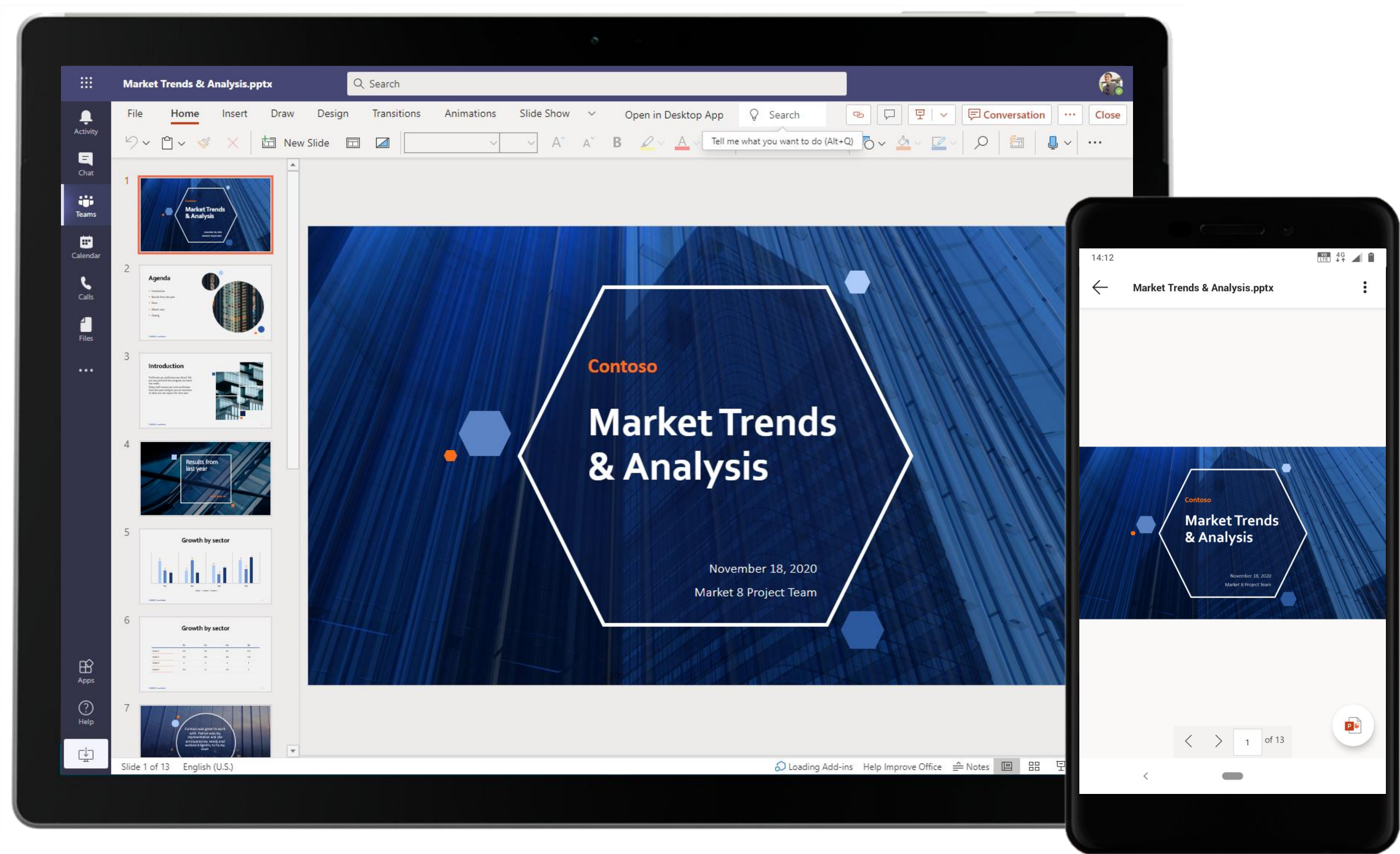
The Finance Manager uses Excel in Teams to create a product breakdown and shares it in a 1:1 chat. .



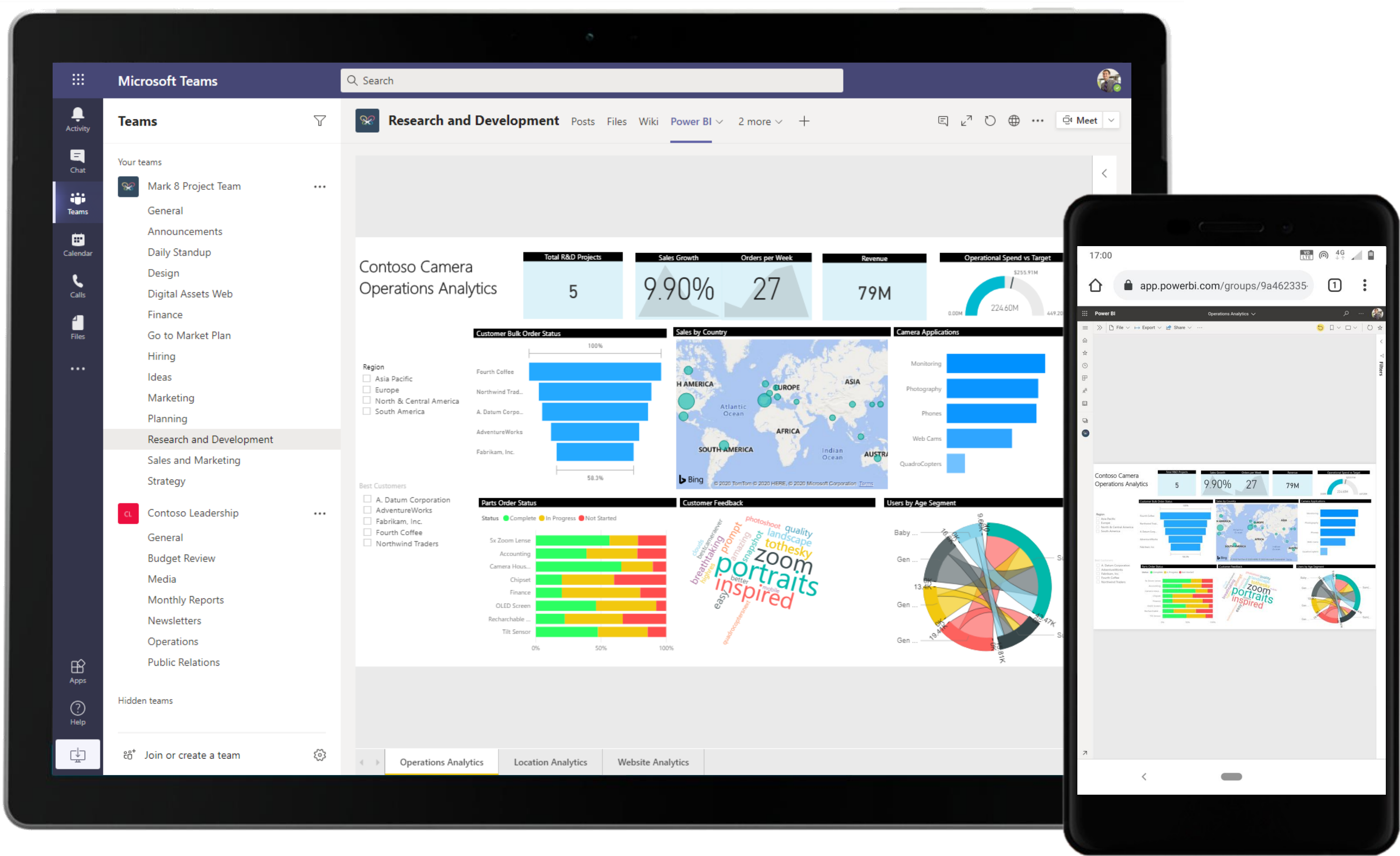
Channel conversations can contain a lot of things – conversations, files shared by team members, meeting threads, and GIFs! Use social features like reacting to team members’ conversations and responses to acknowledge them.



Teamwork's app for Microsoft Teams lets you add content from Teamwork or Spaces as tab Pages in MS Teams. Share crucial project information with your team using Teamwork's notebook.



Create and share PowerPoint presentations over a Teams call to make meetings meaningful and to offer attendees a visual representation of key points covered.



Build dynamic data visualizations, measure metrics, and track analytics through Power BI within Teams. The Market Analyst shares the analysis using Power BI.



Strategizing the Way Forward

Project Coordinator

Scenario Walkthrough

Contoso has done a thorough analysis of the current trends in the market and discussed what can be incorporated into this project to make it click. The team now discusses the detailed outline with the entire team and a strategy to be followed to reduce costs. Having defined the teams and channels where the work will progress, the Project Coordinator collaborates with his associates over Microsoft Teams to execute the task.

- Attends a meeting to discuss details of the project via channel meetings.
- Takes an overview of the requirements of the project with the team using Freehand by InVision.
- Creates the project plan and shares it with team members using Zoho Projects tab.
- Adds and edits tasks using Zoho bot.
- Discusses the task of analyzing risks and coming up with an actionable plan to manage them using Zoho message extension.
- Uses the @mention feature to get the attention of relevant team members.
- Incorporates the suggested changes and finalizes the plan.

How did teams help the Project Co-Ordinator to execute his Roles and Responsibilities?

- Create and manage projects effectively using Zoho Projects tab.
- Add and edit tasks easily using Zoho Projects bot.
- Discuss details of a task with the team effectively using Zoho message extension.
- Provide an overview of project requirements using Freehand by InVision board.

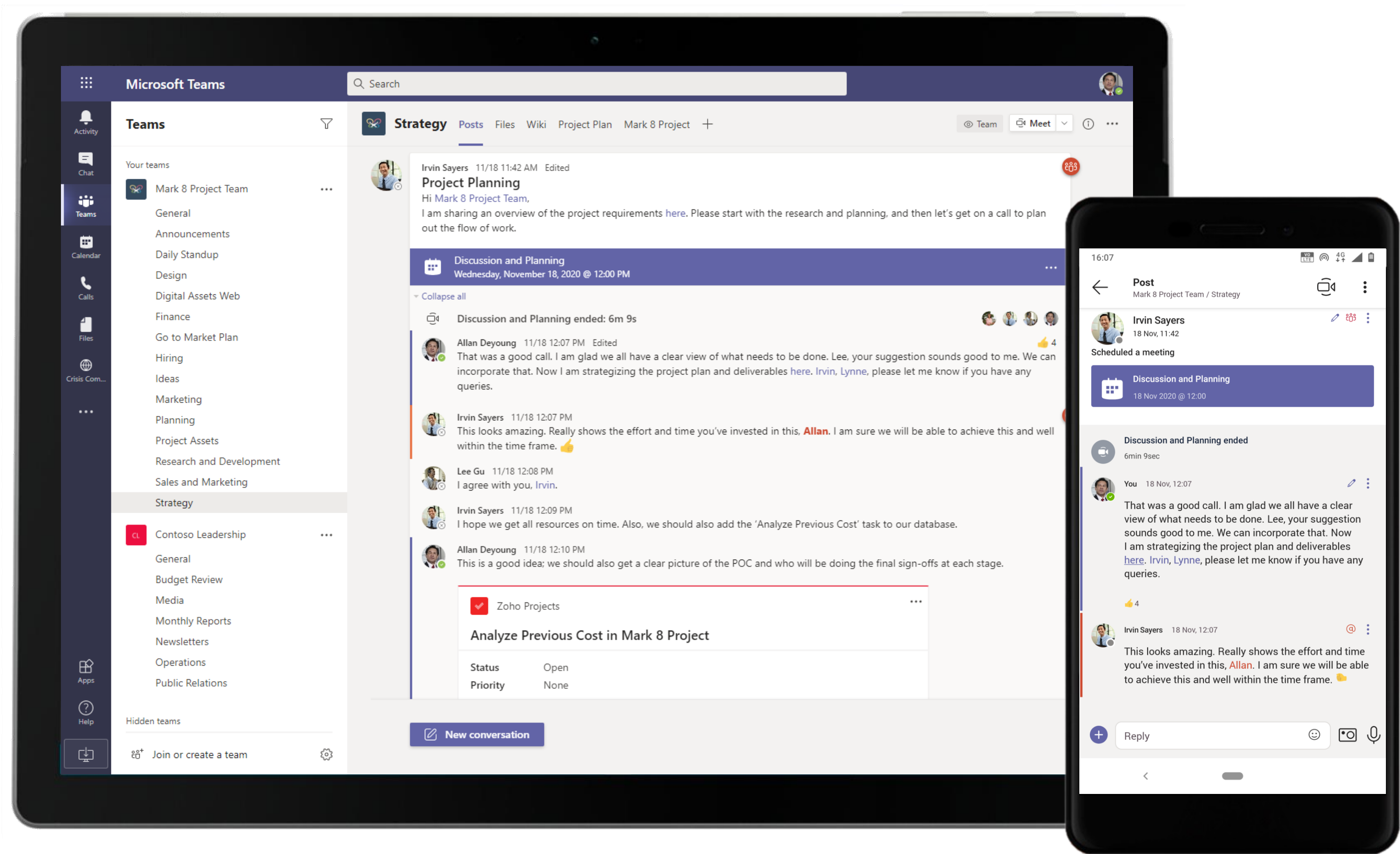
Which app integrations on Teams made it possible?



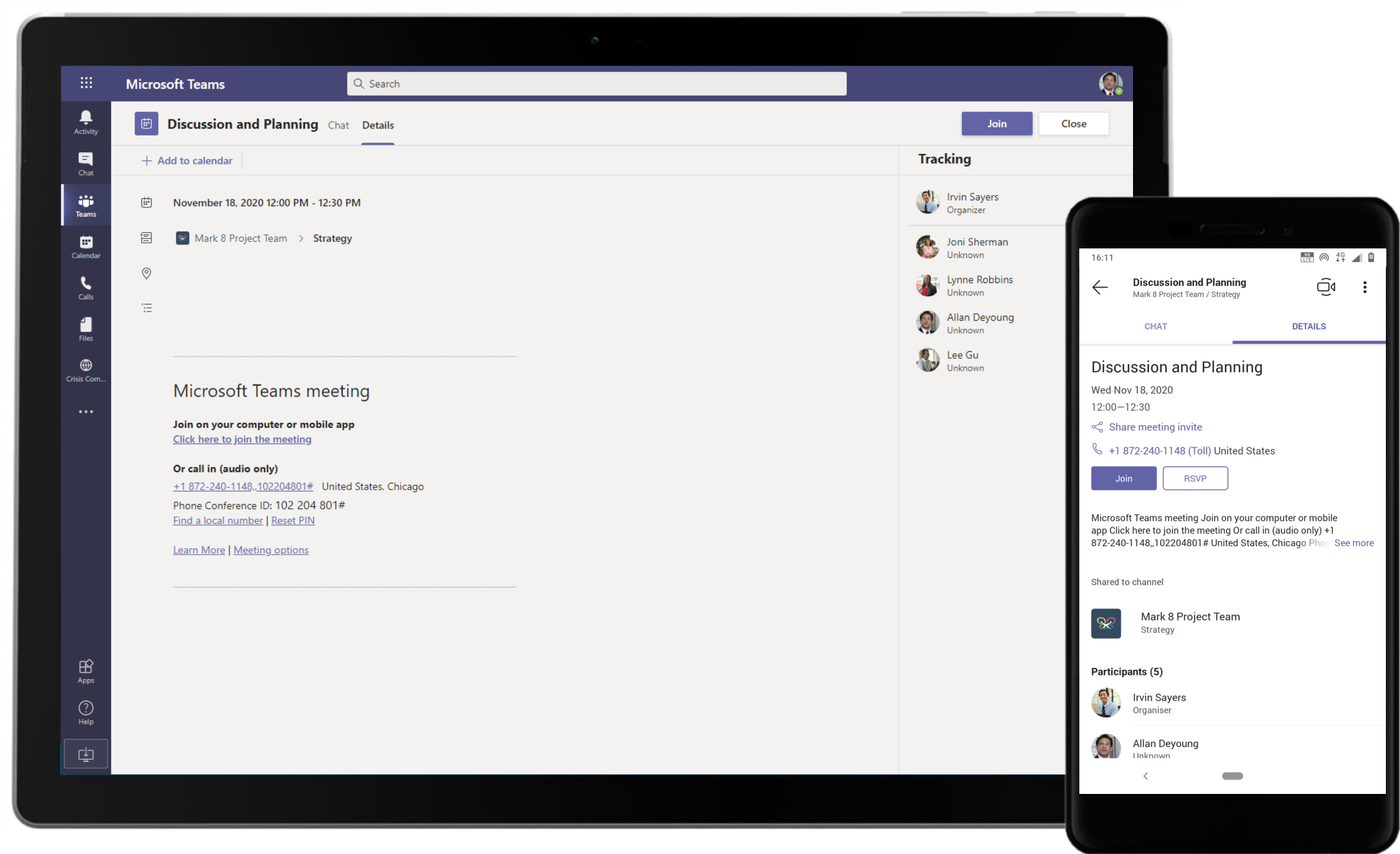
Freehand by
InVision



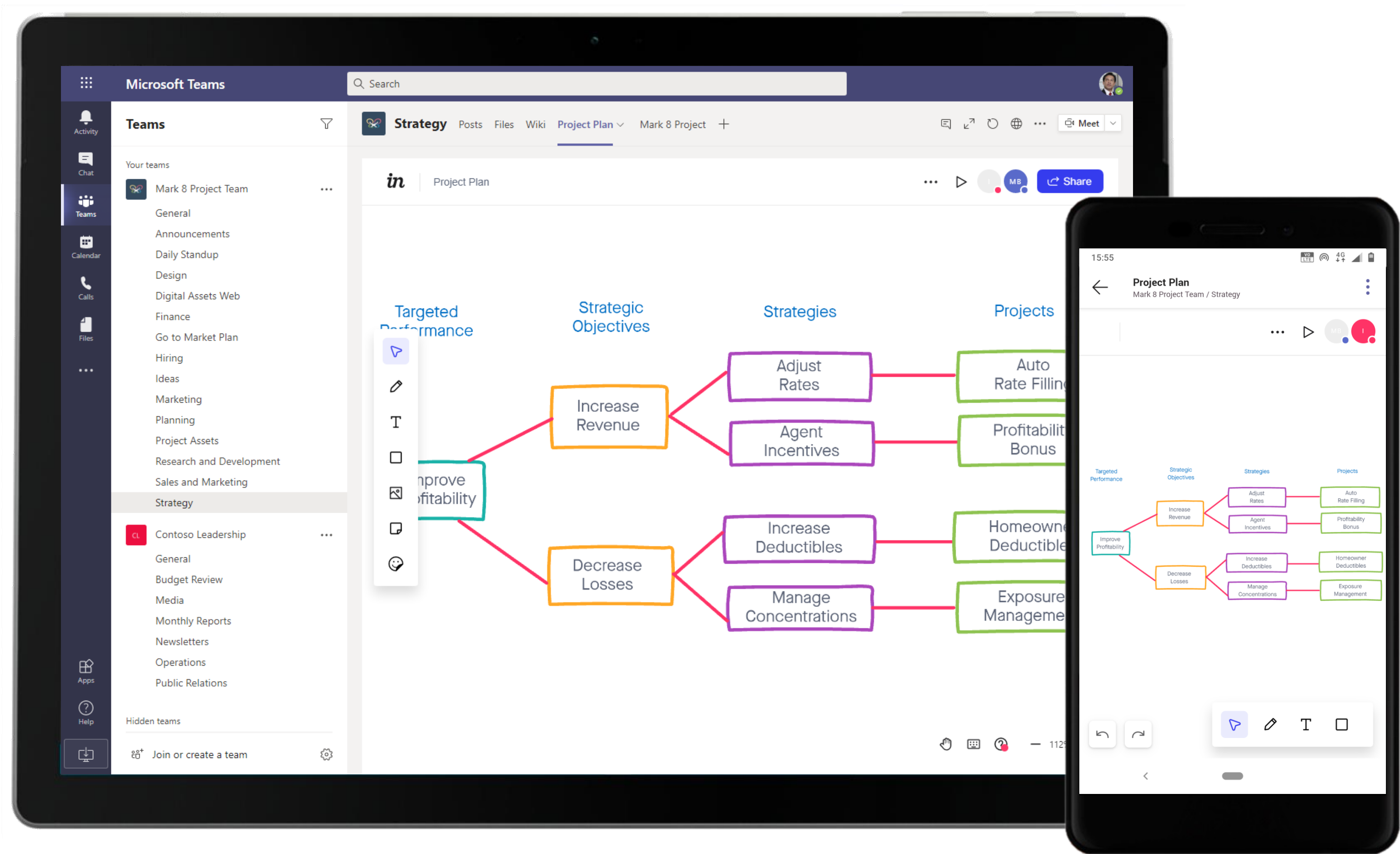
Zoho Projects



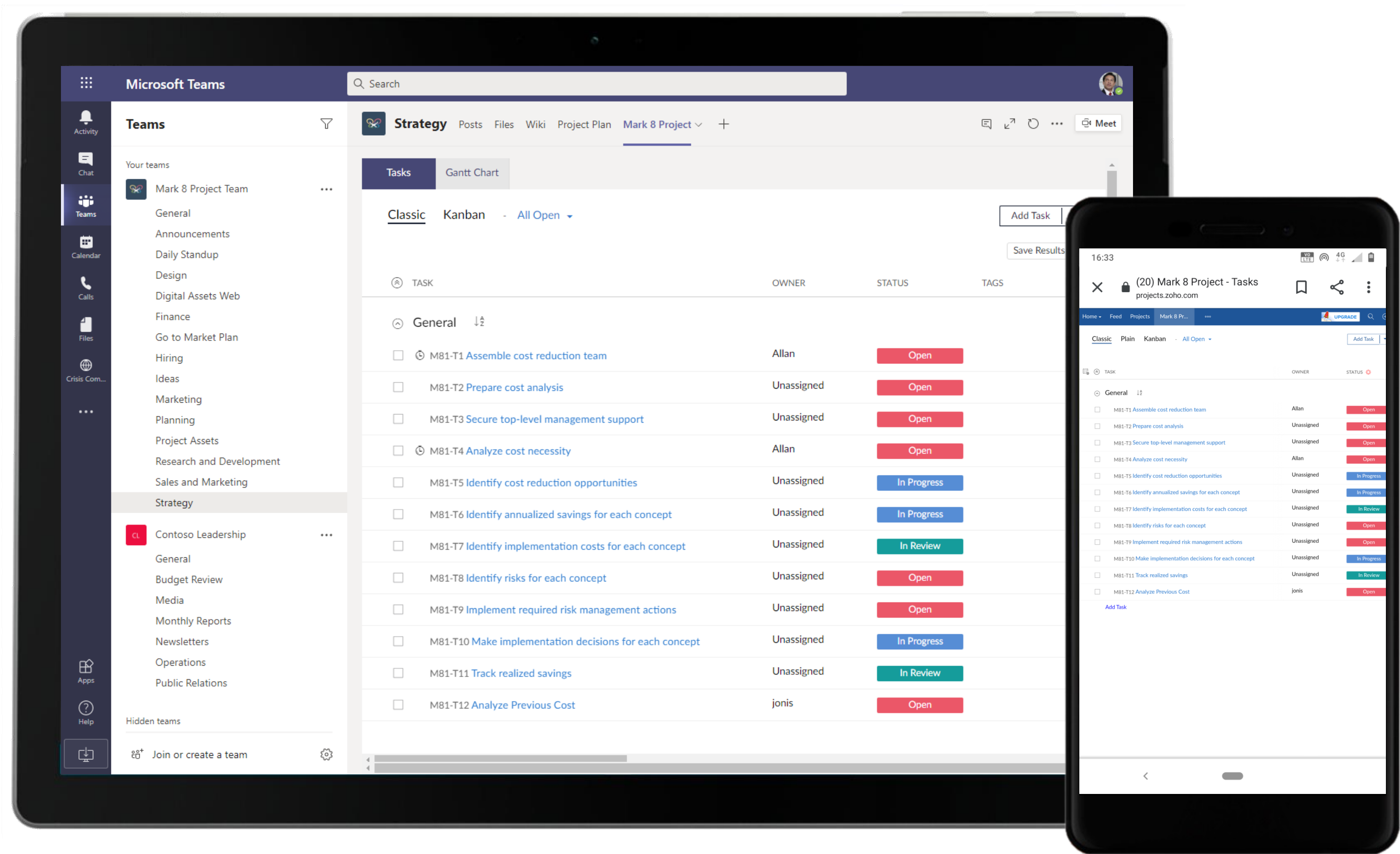
Create and manage projects effectively with the collaborative Zoho Projects right inside Teams. The Project Coordinator creates a project plan and shares it with the team using Zoho Projects tab.



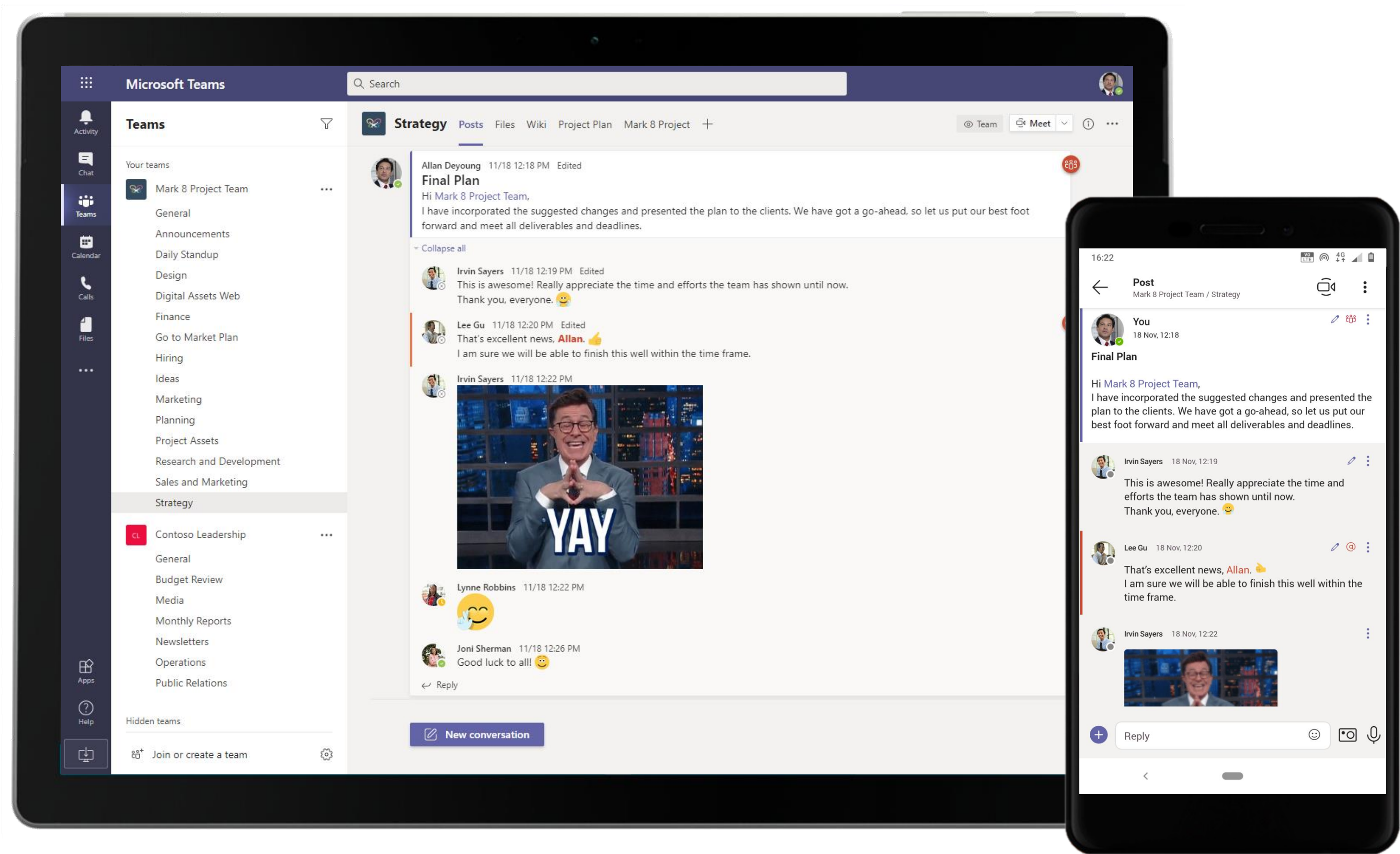
Complete meeting solutions in Teams support screen sharing, recording, video and audio conferencing. Scheduling Assistant feature suggests times that are optimal for all attendees.



Collaborate, ideate and draft strategies, plans on an infinite white boarding space with Freehand by InVision in Teams. The Project Coordinator creates the project plan and shares it with the team using Freehand by InVision.



Use Zoho Projects bot to add /edit tasks instantly. The Project Coordinator adds and edits task using Zoho Projects bot right inside Microsoft Teams.



Microsoft Teams conversations are threaded so users can reply directly in-context to specific conversations. Intense in moments of work flurry, these channels also see a fair amount of levity with GIFs and emojis that makes working together fun!



Planning

Check out how the Project Management team can use Microsoft Teams to keep your business running efficiently and address unexpected situations with confidence.

Project Management Superpowers in Teams

Capabilities and features used...

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- Participate in instant, open-channel communication
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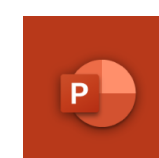
Apps that enable an immersive experience in Teams



Word



Excel



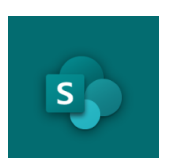
PowerPoint



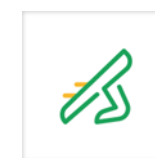
Ment.io



Lucidchart



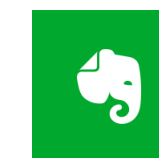
SharePoint



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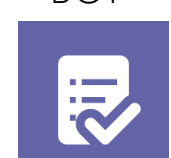
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Meet the Business Decision Makers

Project Management



Project Manager

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- Monitor the progress of work and assign task to employees
- Ensure on time delivery of the project
- Ensure minimum or zero bugs in the final document
- Escalate any risk or delays that can impact the project



Set Up an Environment to Collaborate

Project Manager

Scenario Walkthrough

The Project Manager, responsible for overseeing a marketing project, sets up an environment with channels, applications, tabs, and team members to effectively coordinate the project execution and to work together with multiple stakeholders seamlessly on a single platform. See how the Project Manager leverages Microsoft Teams to do so.

- Creates a team and channels for the project and sends a welcome message to all the team members.
- Adds a tab to initiate discussions and gather inputs with the employees using Ment.io.
- Sets up a meeting to discuss the ideas using breakout rooms, and finalize them, to put them into action.
- Asks the Associate Project Manager to share the meeting notes into a OneNote notebook.
- Configures Asana to start the action on the project.

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

- Organize discussions to engage employees with strategic questions without conducting a live meeting or a conference call using Ment.io.
- Note-taking in a group OneNote allows team members to have shared access to the information.
- Organize and assign tasks with Asana to prioritize work, track the team's progress.

Which app integrations on Teams made it possible?



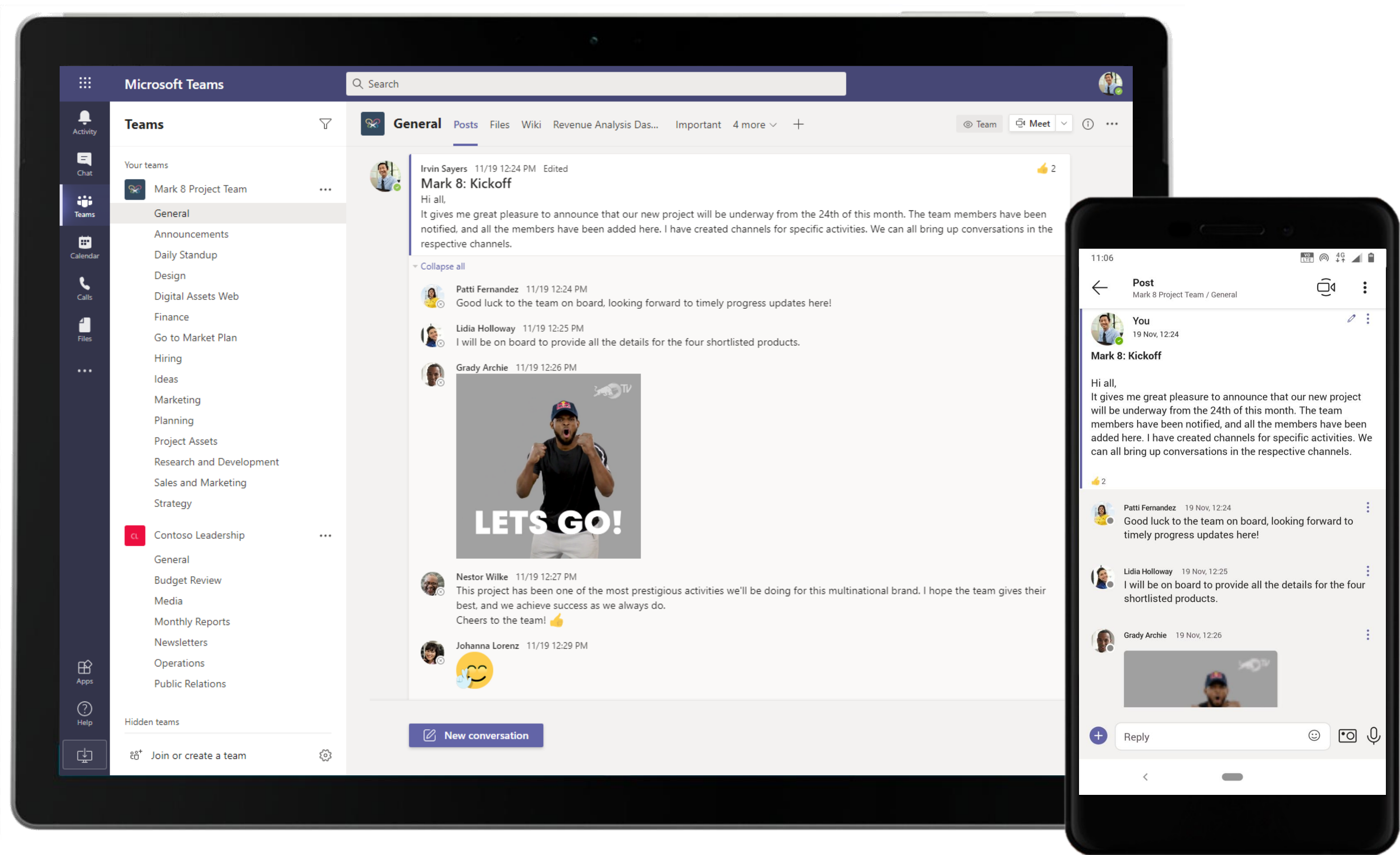
Asana



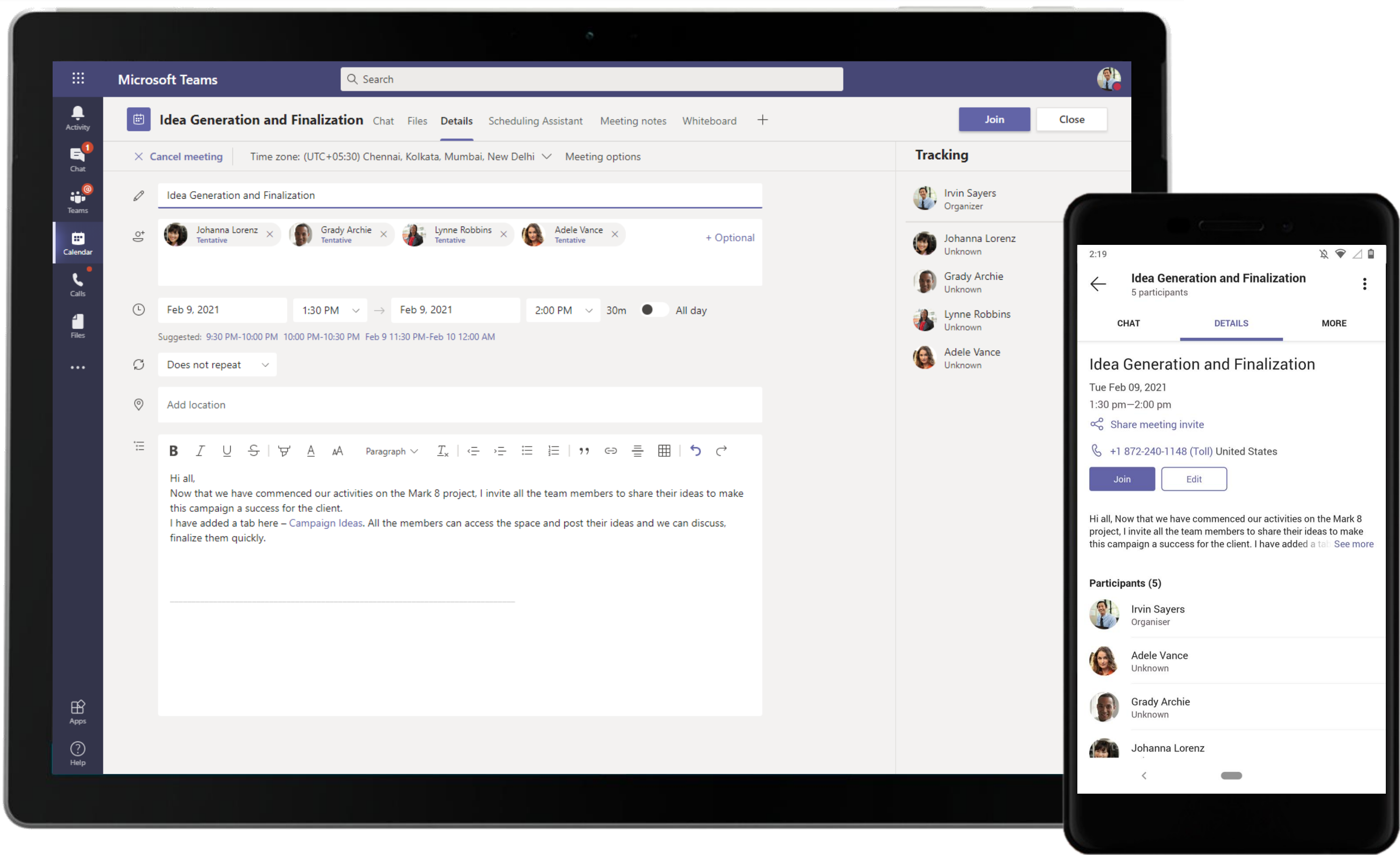
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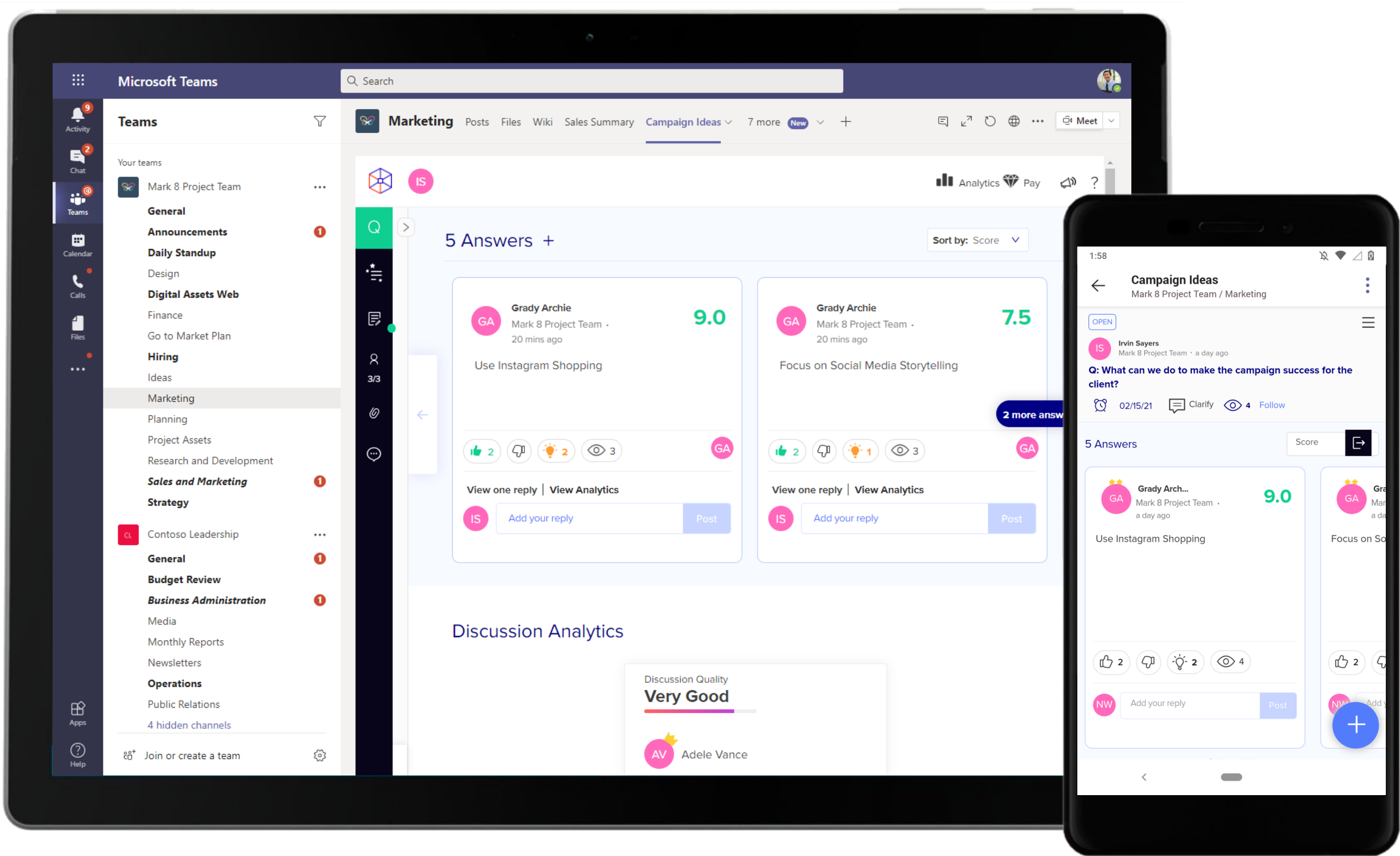
OneNote



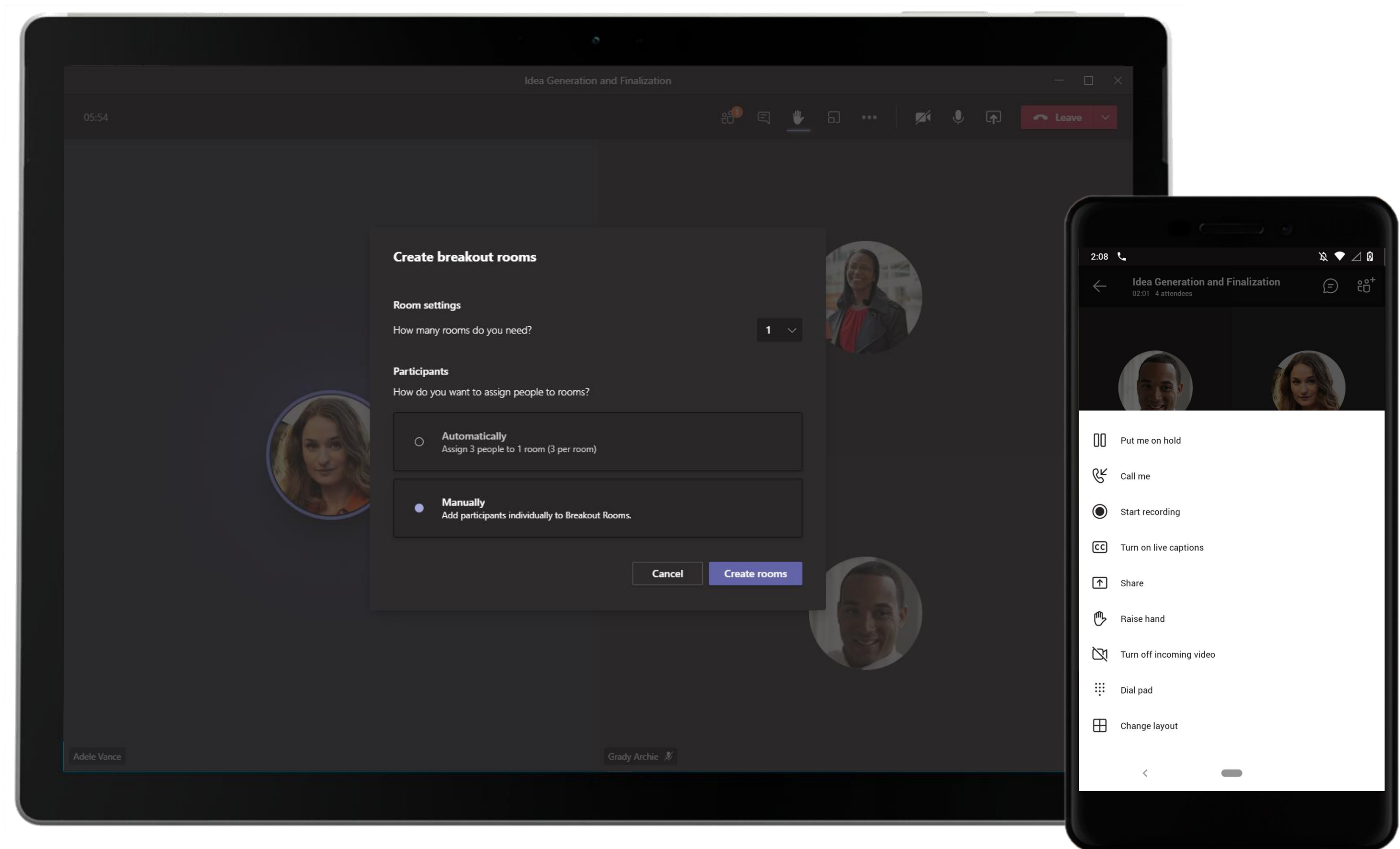
Channels can be created to serve any purpose. They can be created to increase communication and productivity among team members and in this case, the Project Manager kicks off new project and adds relevant team members to the channel.



Plan meetings or keep them impromptu, according to team members’ availability, which reflects in the native scheduling calendar. Hold calls and conferences and share screens with enterprise grade security.



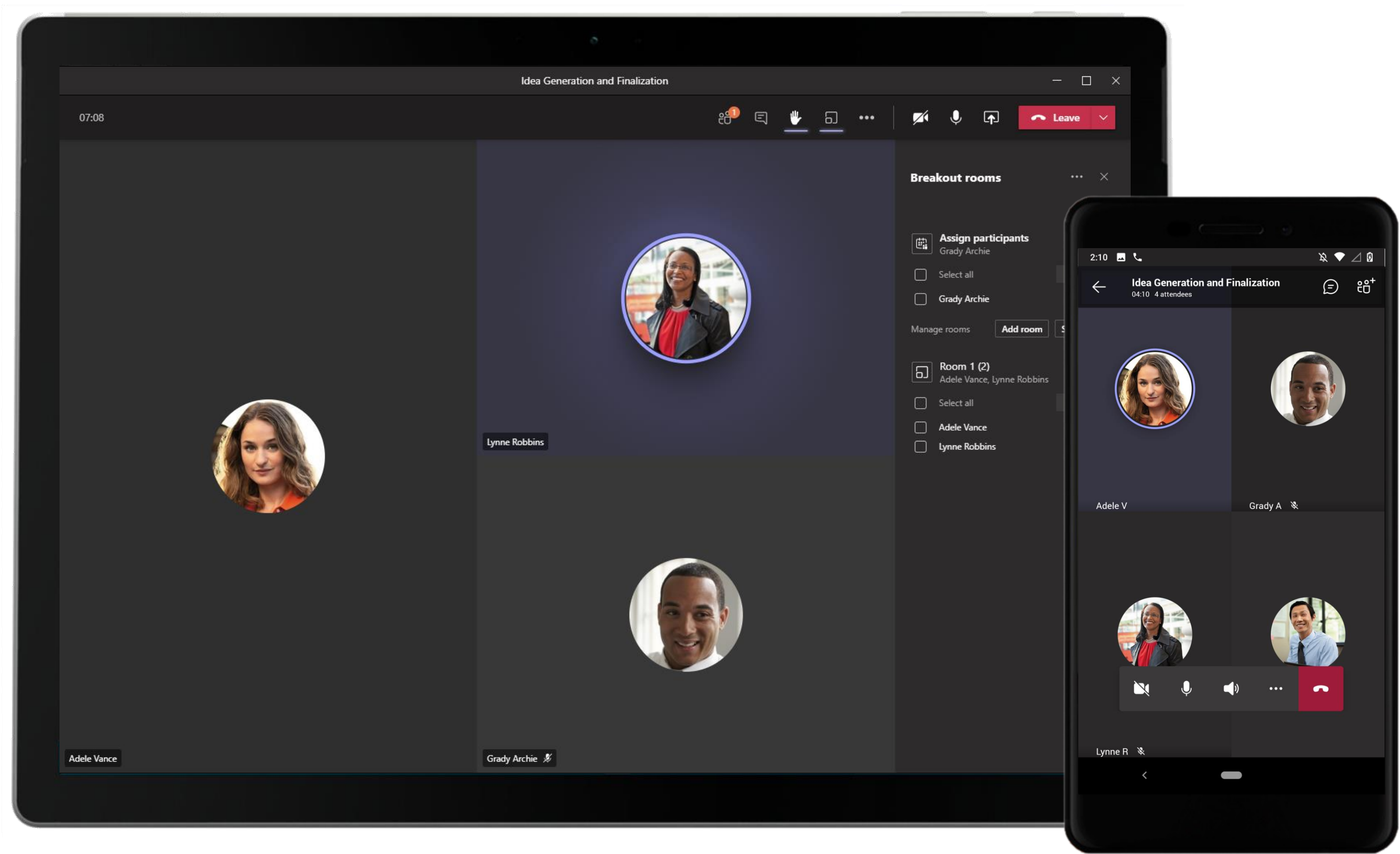
Ment.io provides a simple and flexible structure to your discussion and helps you make a trusted decision faster. The Project Manager views the ideas shared and the votes for each idea with Ment.io.



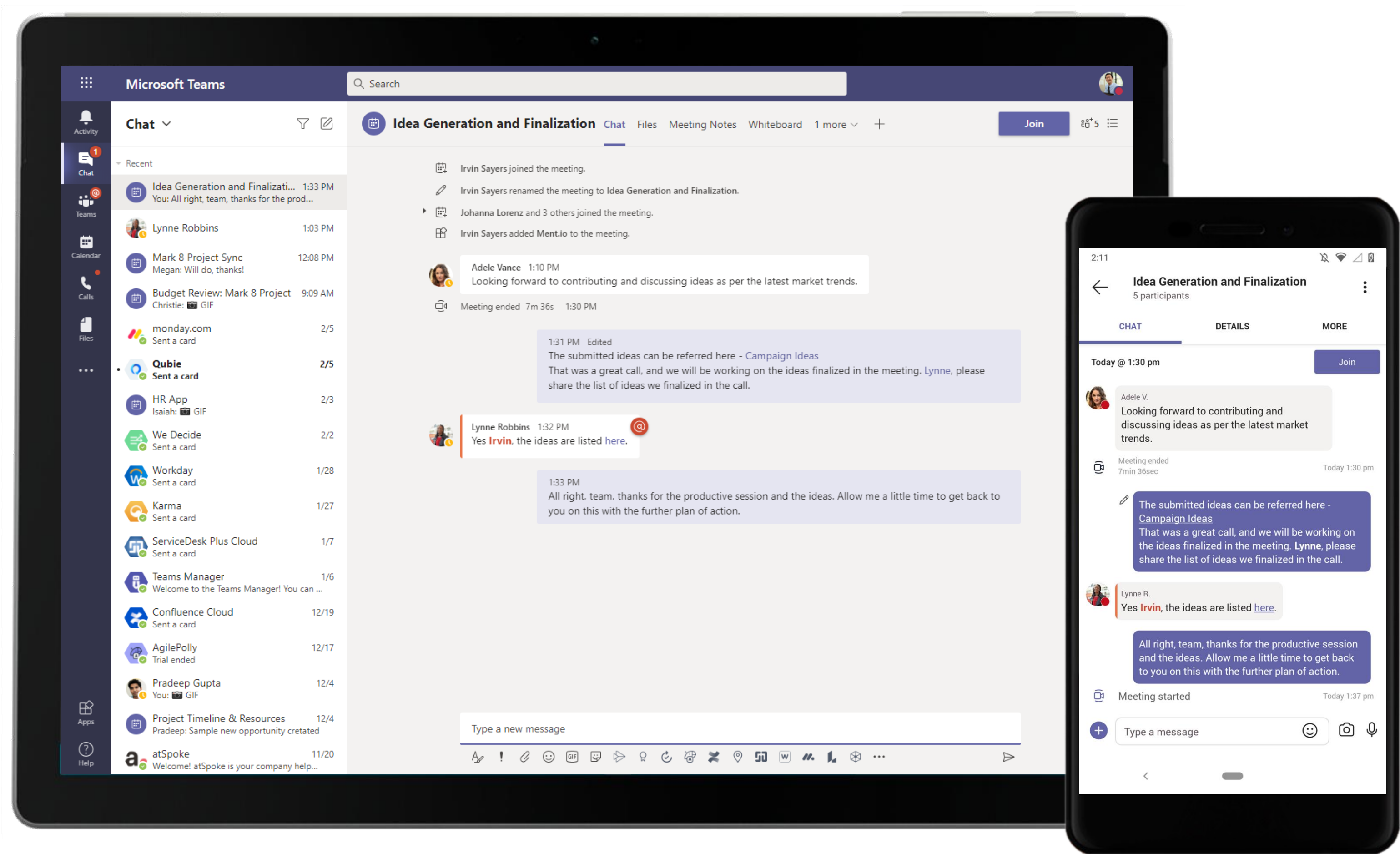
Organizers can choose to manually assign participants to the breakout rooms or let Teams auto assign participants to breakout rooms. Organizers can also specify the number of breakout rooms they need for the meeting.



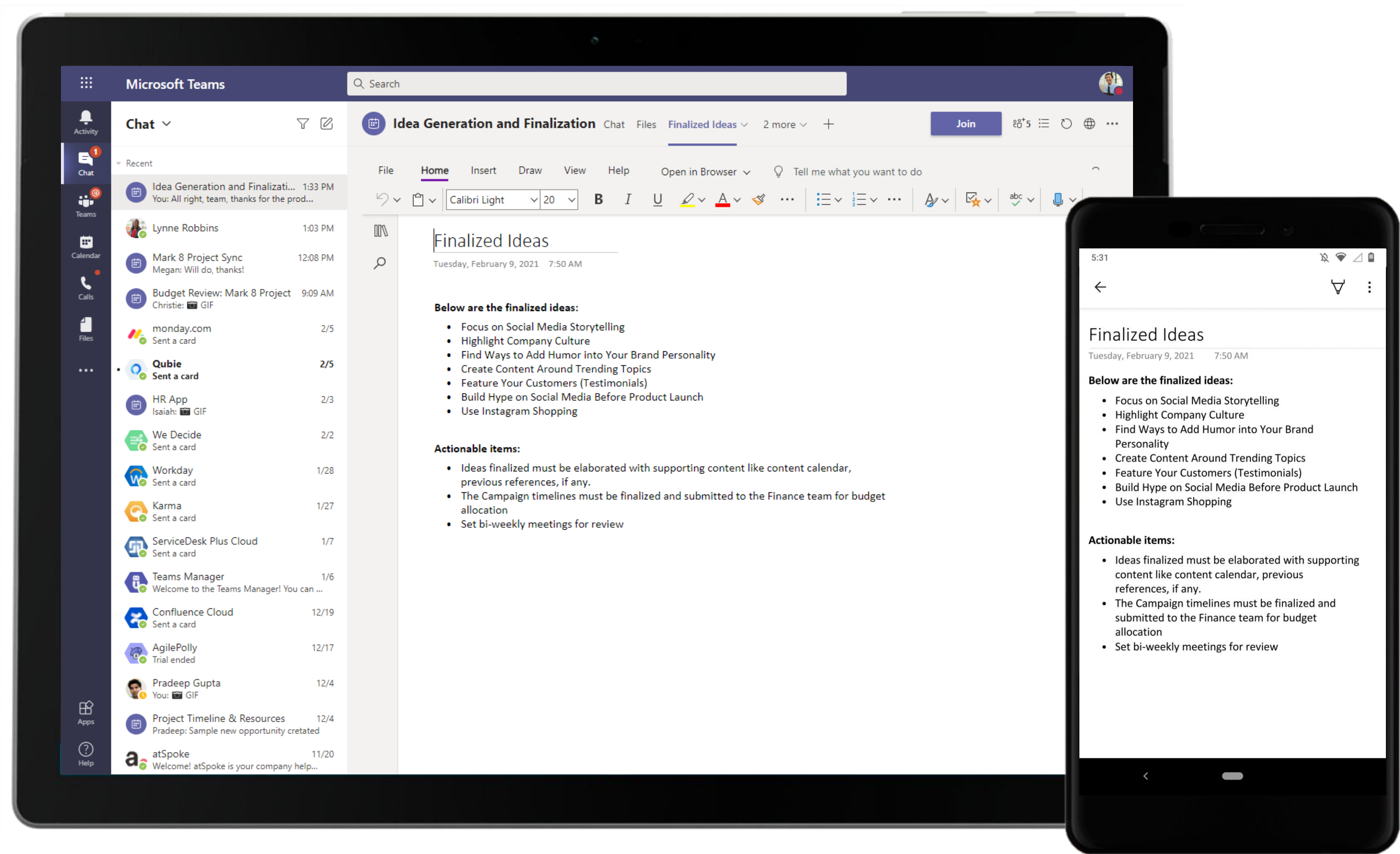
Breakout rooms allow meeting organizers to divide the meeting into sub-groups to facilitate discussions and brainstorming sessions. This allows for greater flexibility during meetings and participants can clarify questions without disturbing the breakout rooms sessions.



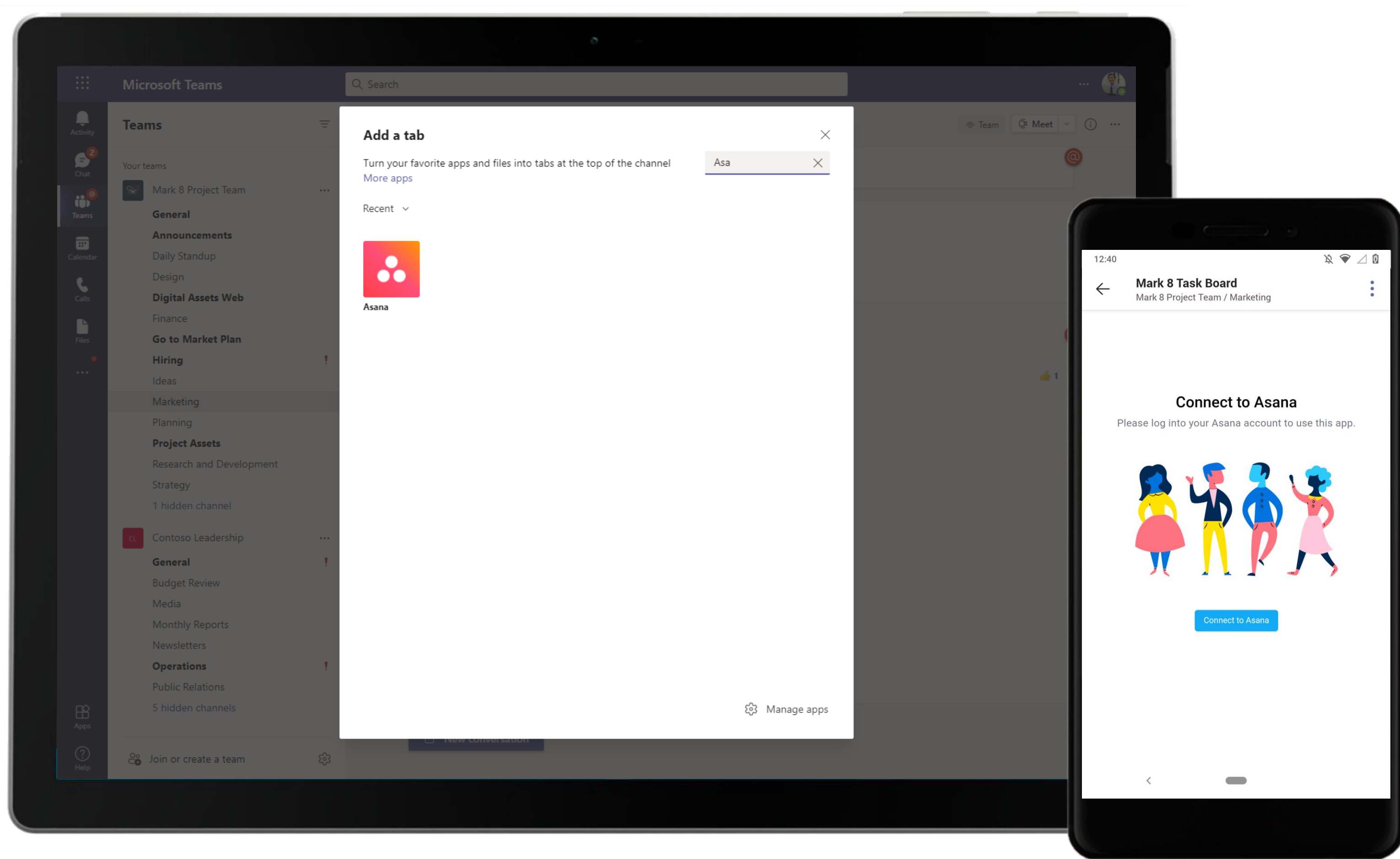
Organizers can choose to add more rooms during a session and also communicate with all participants across breakout rooms.



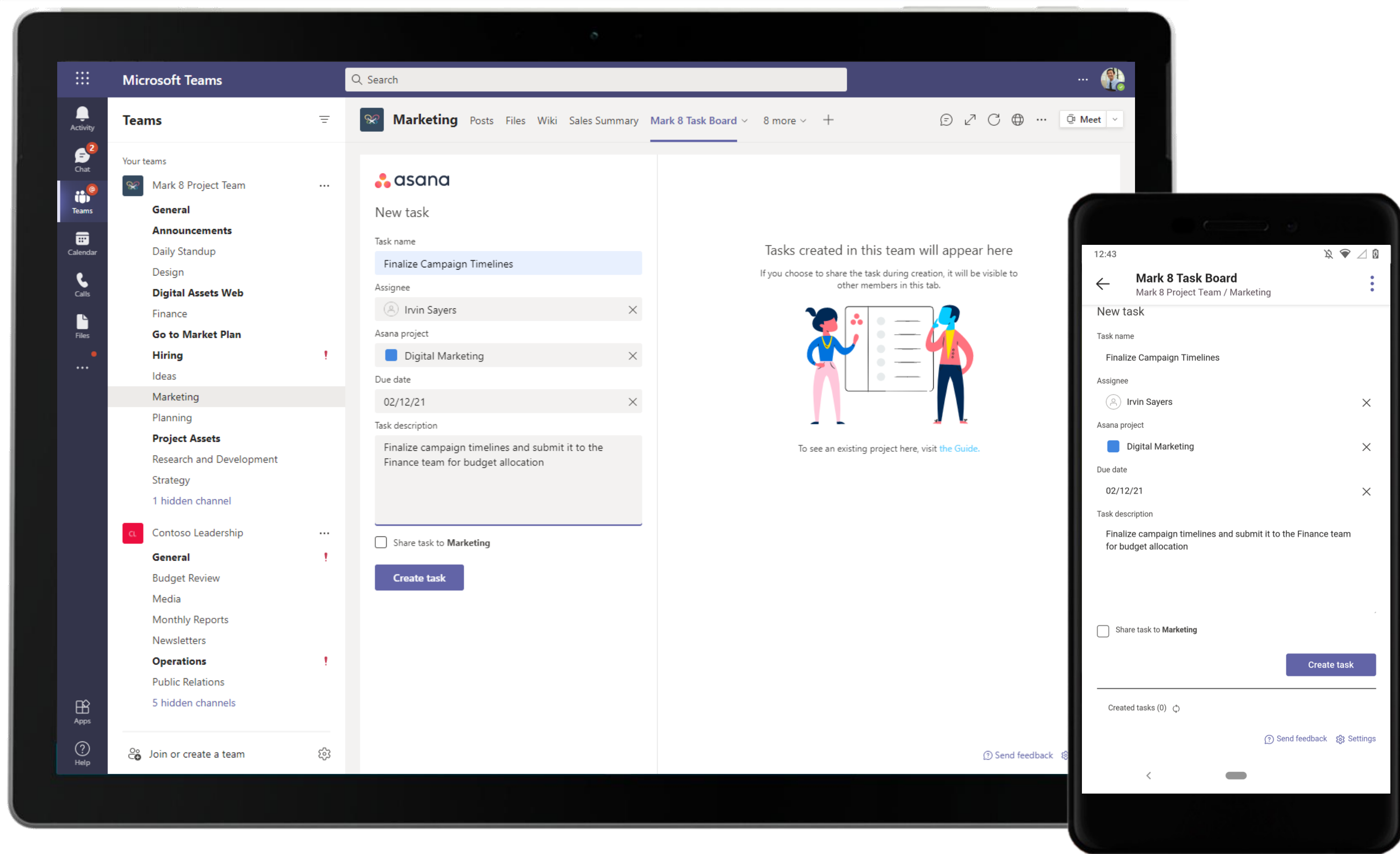
The meeting chat allows you to communicate with participants before and after a meeting. You can also share important files or links that need to be discussed during the meeting.



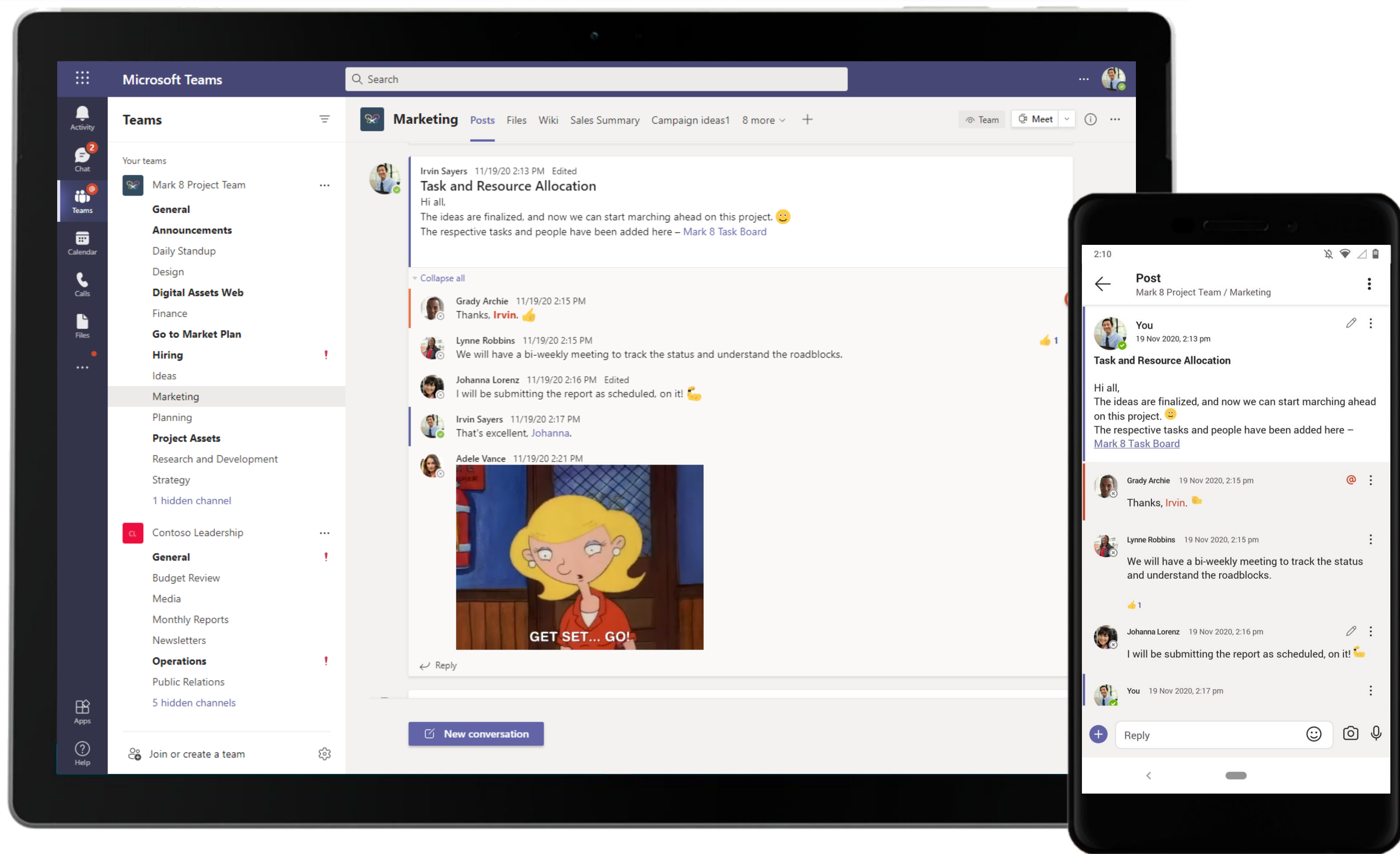
The Project Manager uses the integrated OneNote app within Microsoft Teams to capture the list of submitted ideas and actionable items.



Configure your favorite apps as channel tabs for easy access. The Project Manager configures an Asana channel tab to organize, create and track tasks for the project all in one place.



Create, assign, and track tasks individually or collaboratively with your team, and see everything come together in one place with Asana in Teams.



The Project Manager resourcefully closes out the initiative with a channel post updating team members about the outcome of the collaboration.



Cost Estimation and Budget Planning

Project Manager

Scenario Walkthrough

To deliver a project successfully, Contoso must know how to keep a project well within the set budget. The Project Manager works with the Marketing and Finance teams to analyze the expenses of the previous year and put together a budget for the upcoming year, keeping the growth rate and potential costs in check to avoid massive budget overruns. Here's how he uses Microsoft Teams to connect various team members across the organization easily.

- Reaches out to the Marketing Manager and requests her to share a detailed breakdown of the estimated marketing budget via 1:1 chat
- Reaches out to the Finance Manager and gets on a call to analyze the expense of the previous year via Power BI.
- Downloads the previous year's financial data from Power BI as an Excel file.
- Compiles the marketing budget and other expenditures across verticals into one file using Excel.
- Schedules a meeting with the leadership team to present the budget and then sends the document over for approval using the Approvals app in Teams.

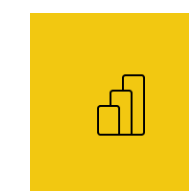
How did Microsoft Teams help the Project Manager to execute his roles and responsibilities?

- Using Excel and Power BI's analytical abilities, team members have shared access to critical business data.
- Integrated Power BI tab in the channel helps transform customer information into a data-driven dashboard to ease the decision-making process.
- Send, receive, manage, and share approvals with Microsoft Teams
- Personal 1:1 chat and channel conversations help reach out to team members anytime.

Which app integrations on Teams made it possible?



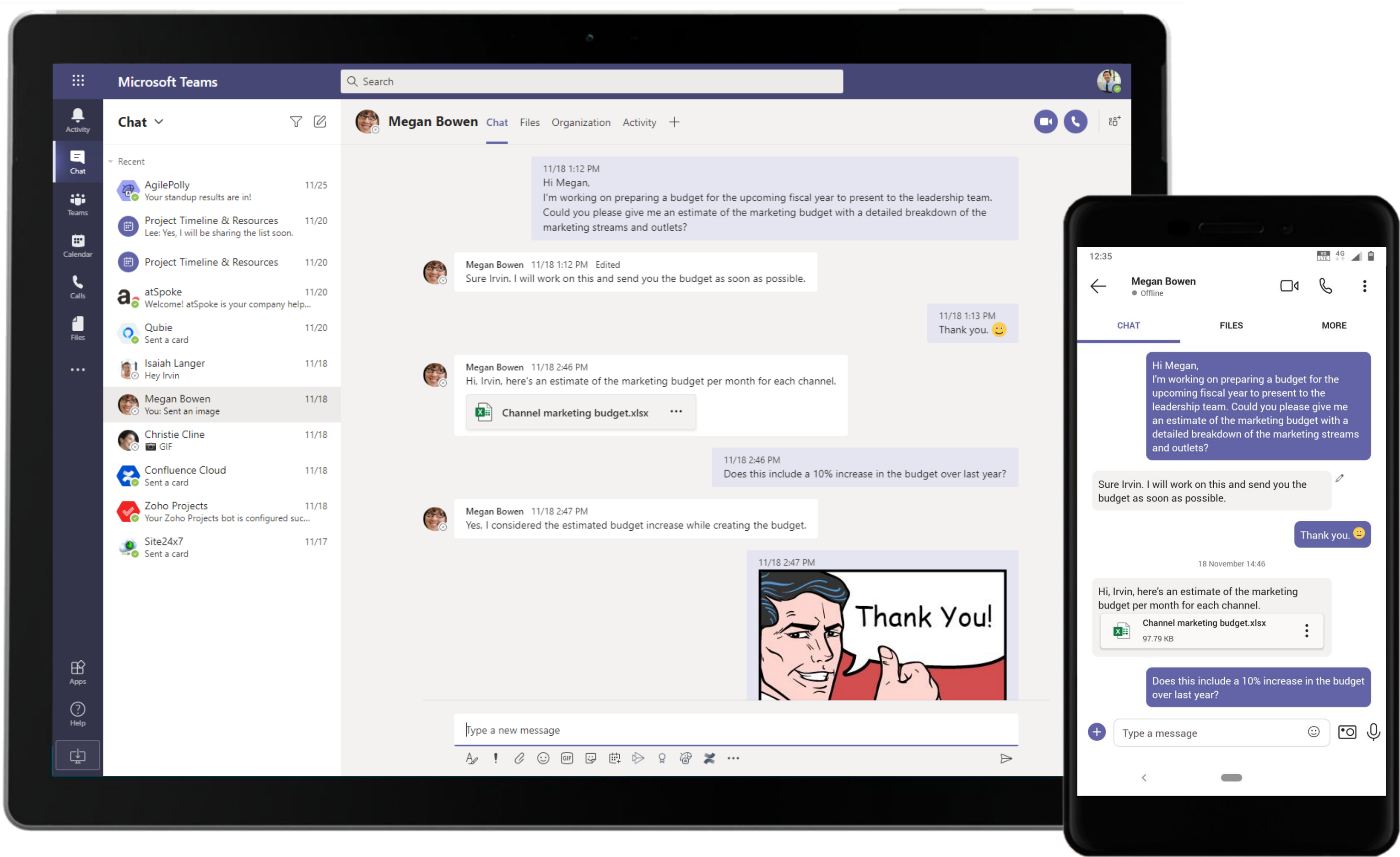
Excel



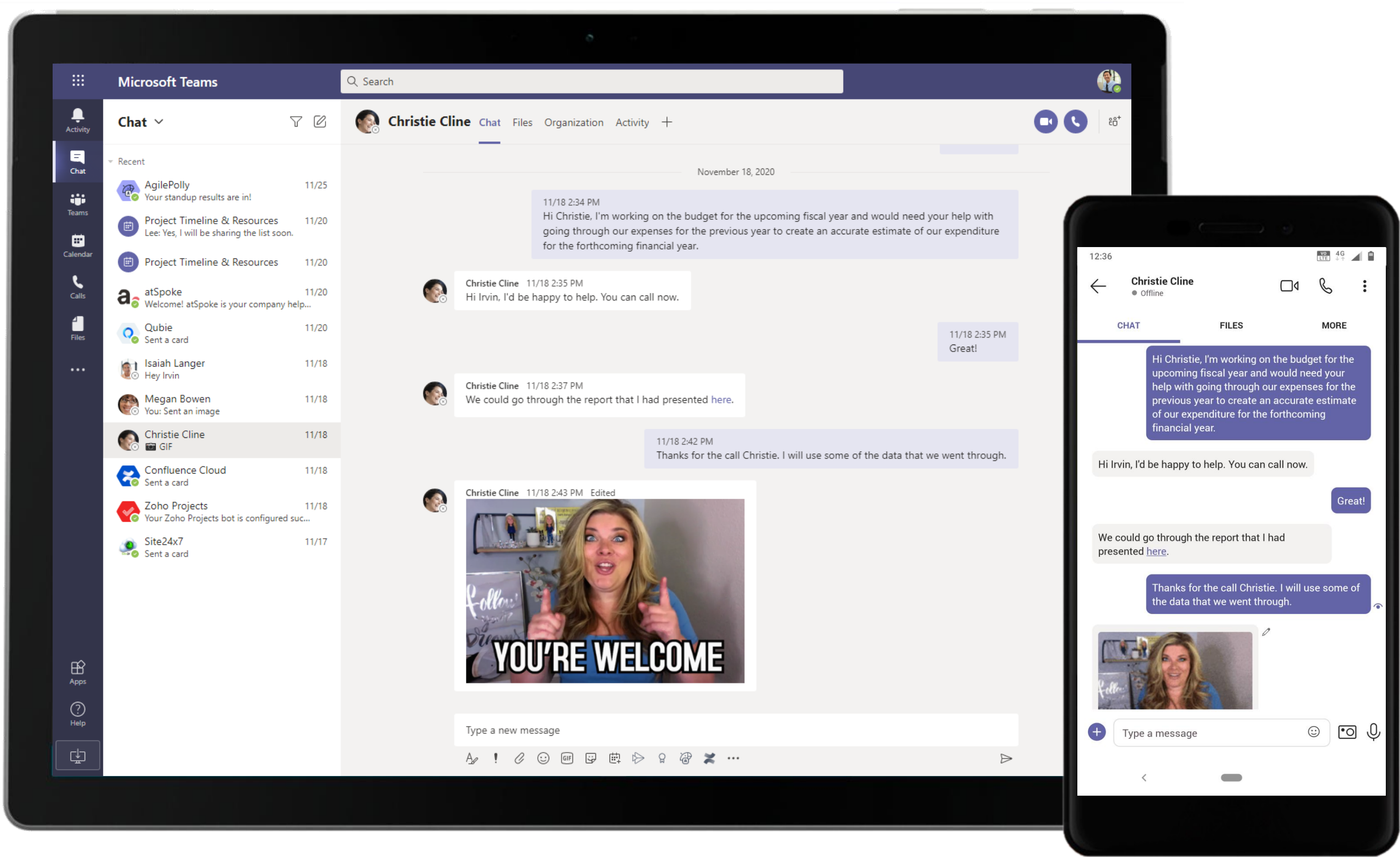
Power BI



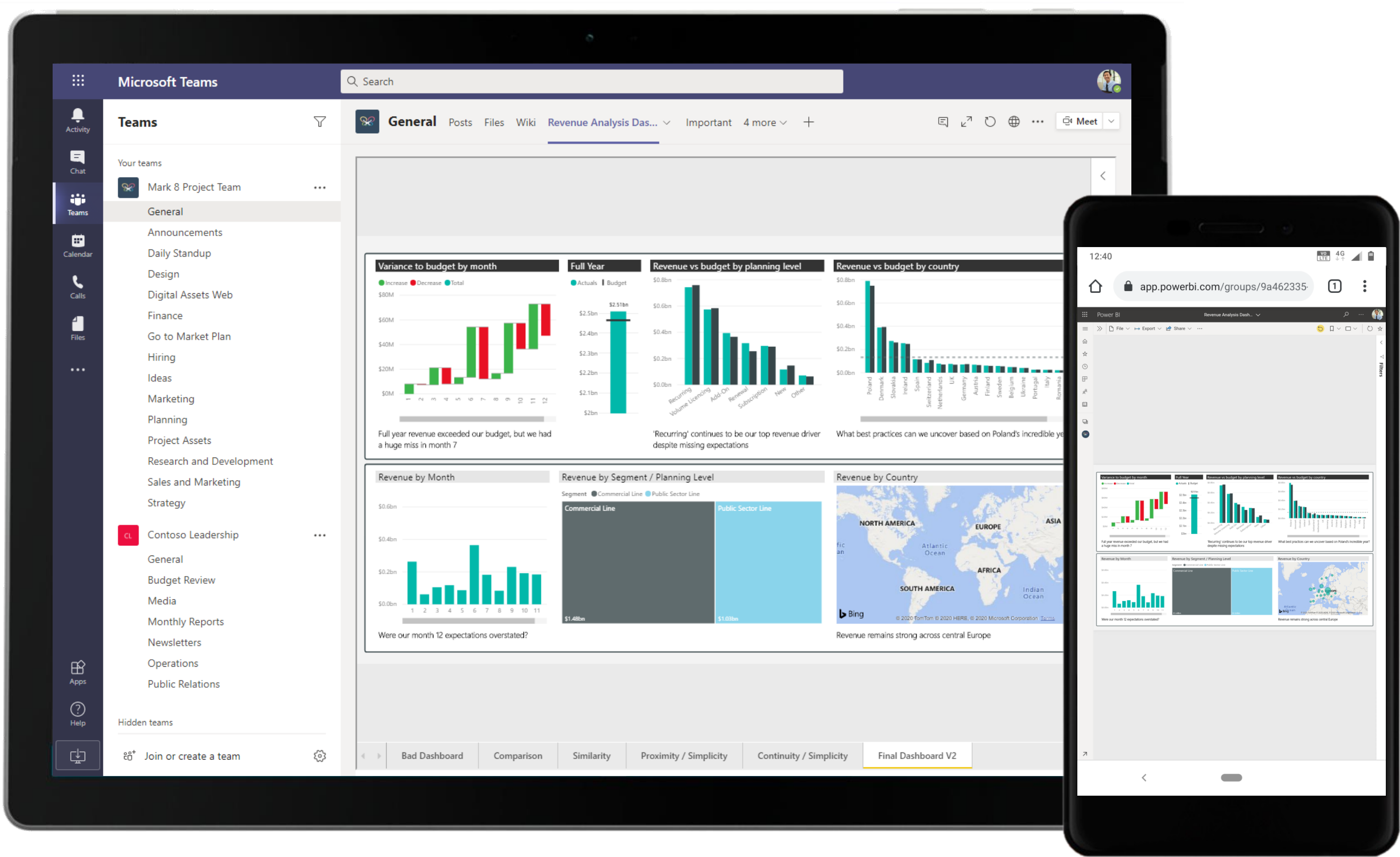
Approvals



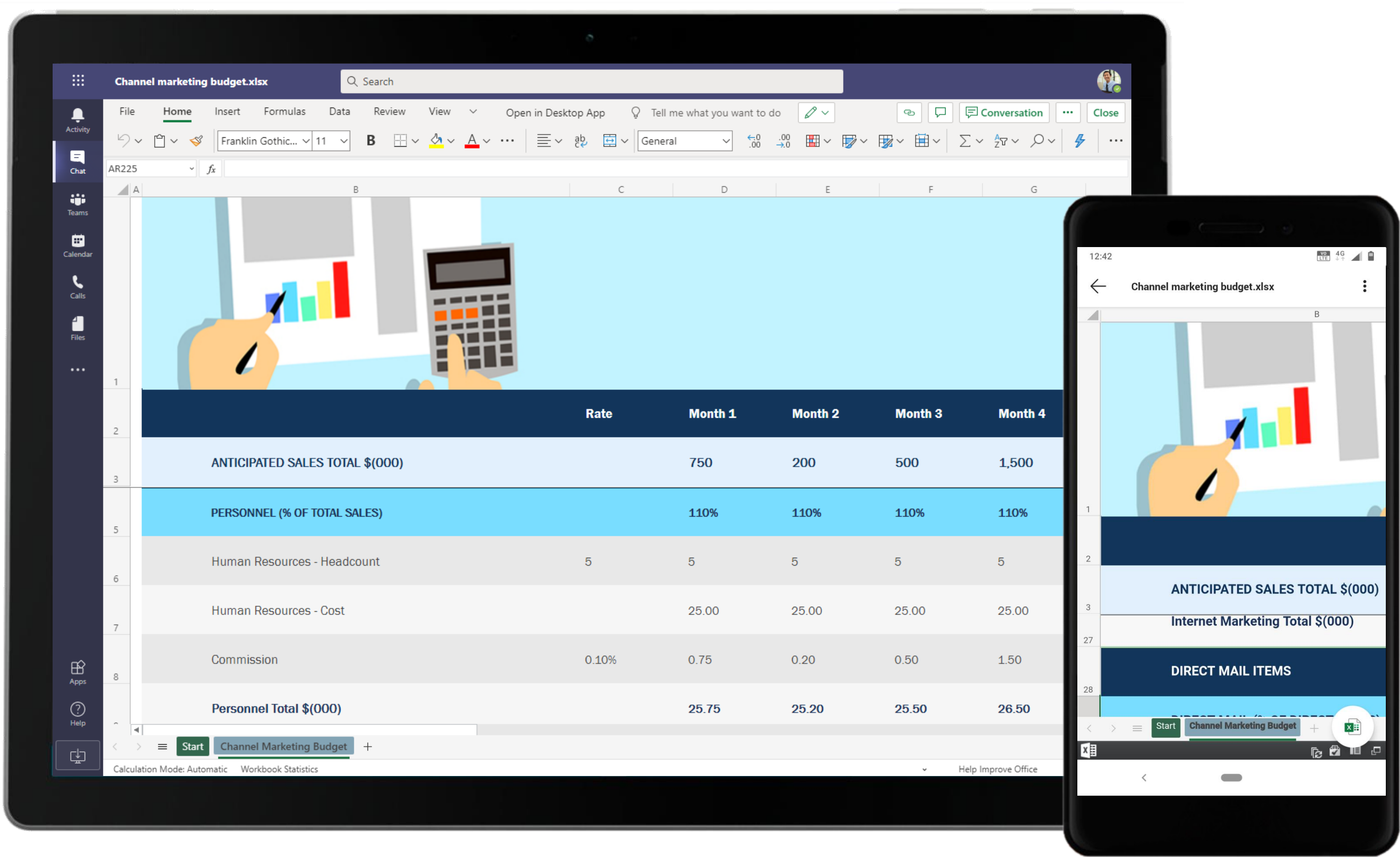
Use a private one-on-one chat or a group chat for conversations that don't require the entire team.
The Project Manager quickly reaches out to the Marketing Manager using 1:1 chat.



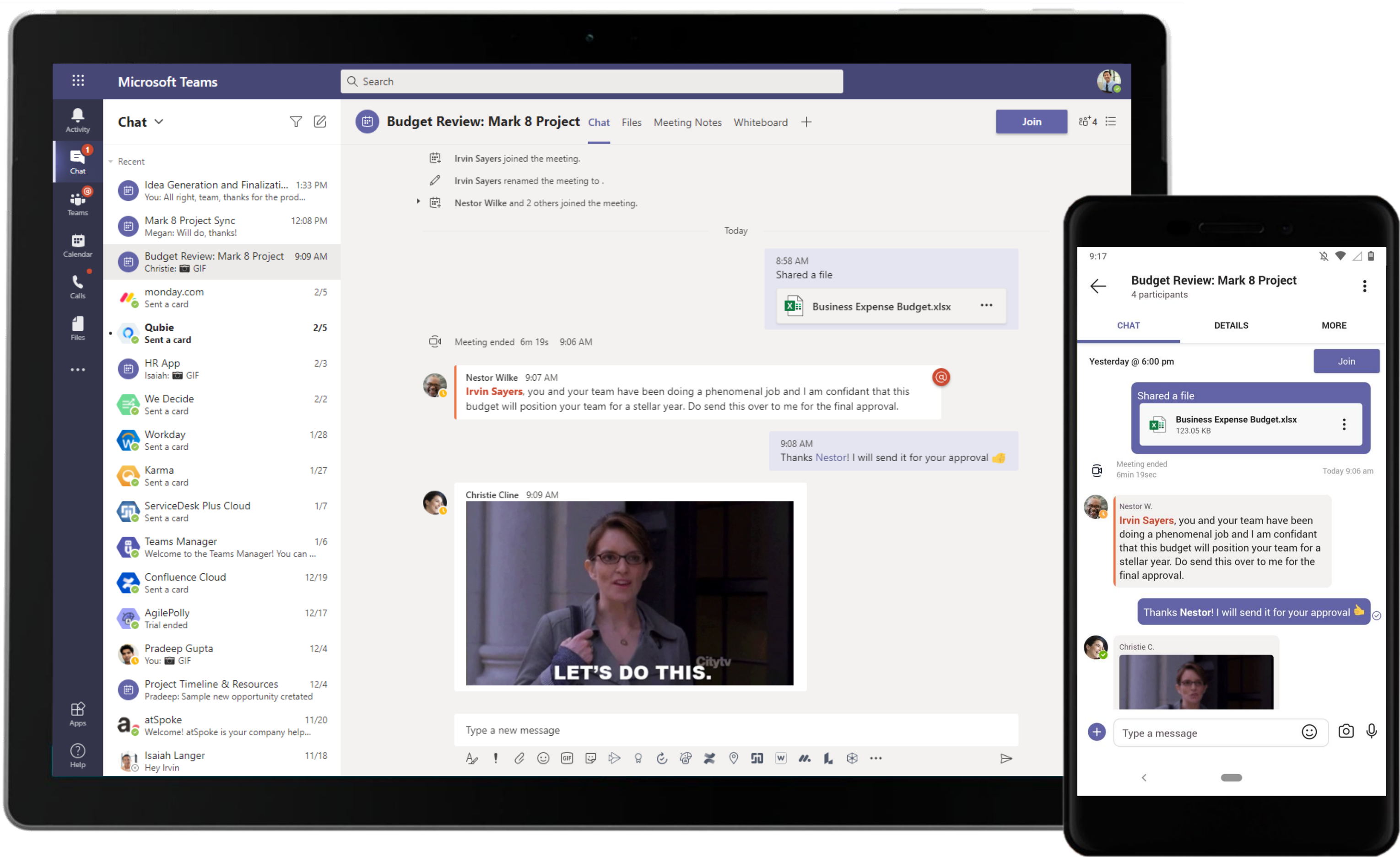
1:1 chat conversations can turn into a call, according to the participants' convenience. The Project Manager and the Finance Manager opt for a call to discuss budgets.



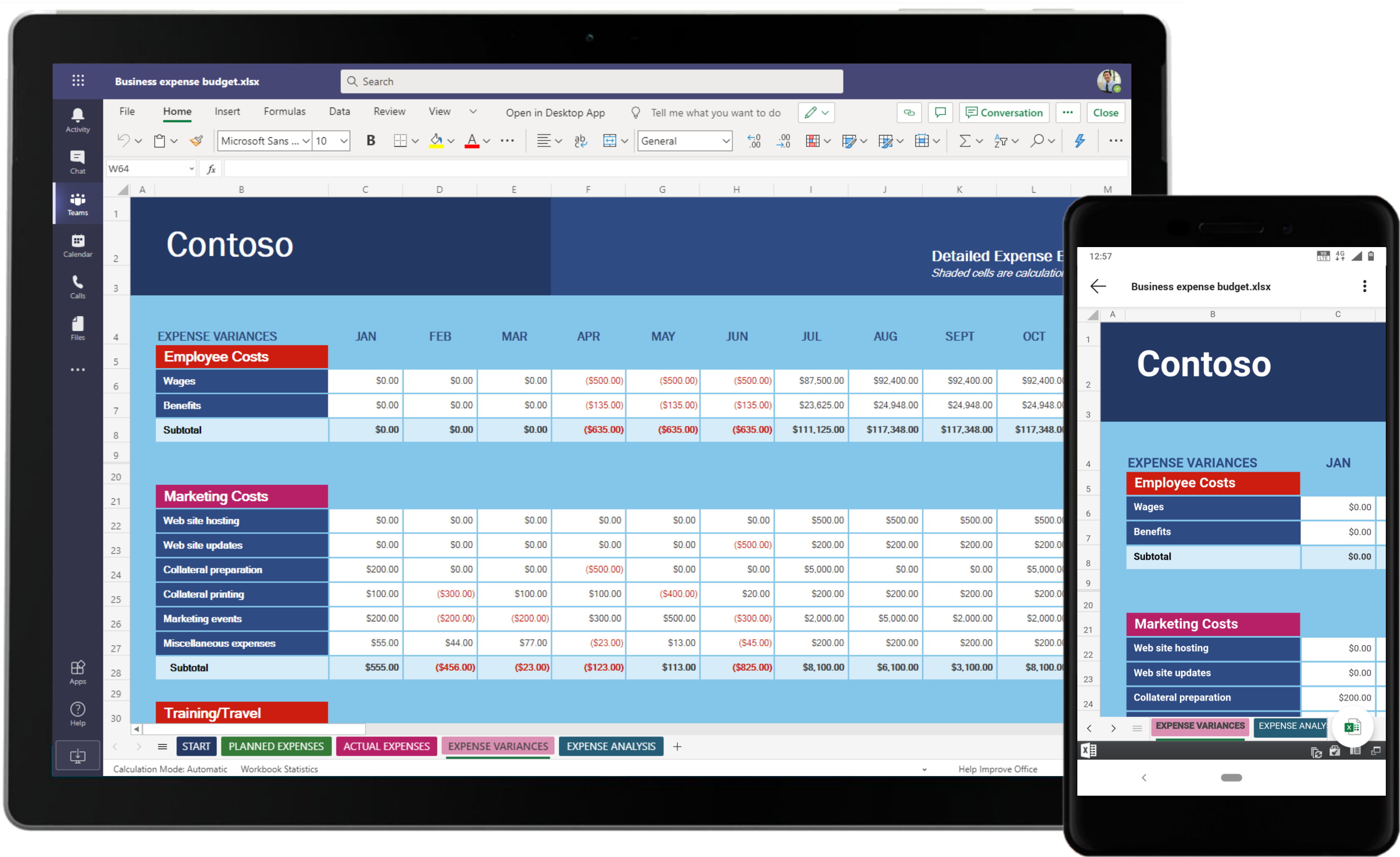
A Power BI dashboard offers a visually rich view of current and projected data. The Project Manager looks at the revenue analysis data pinned in the tab using Power BI.



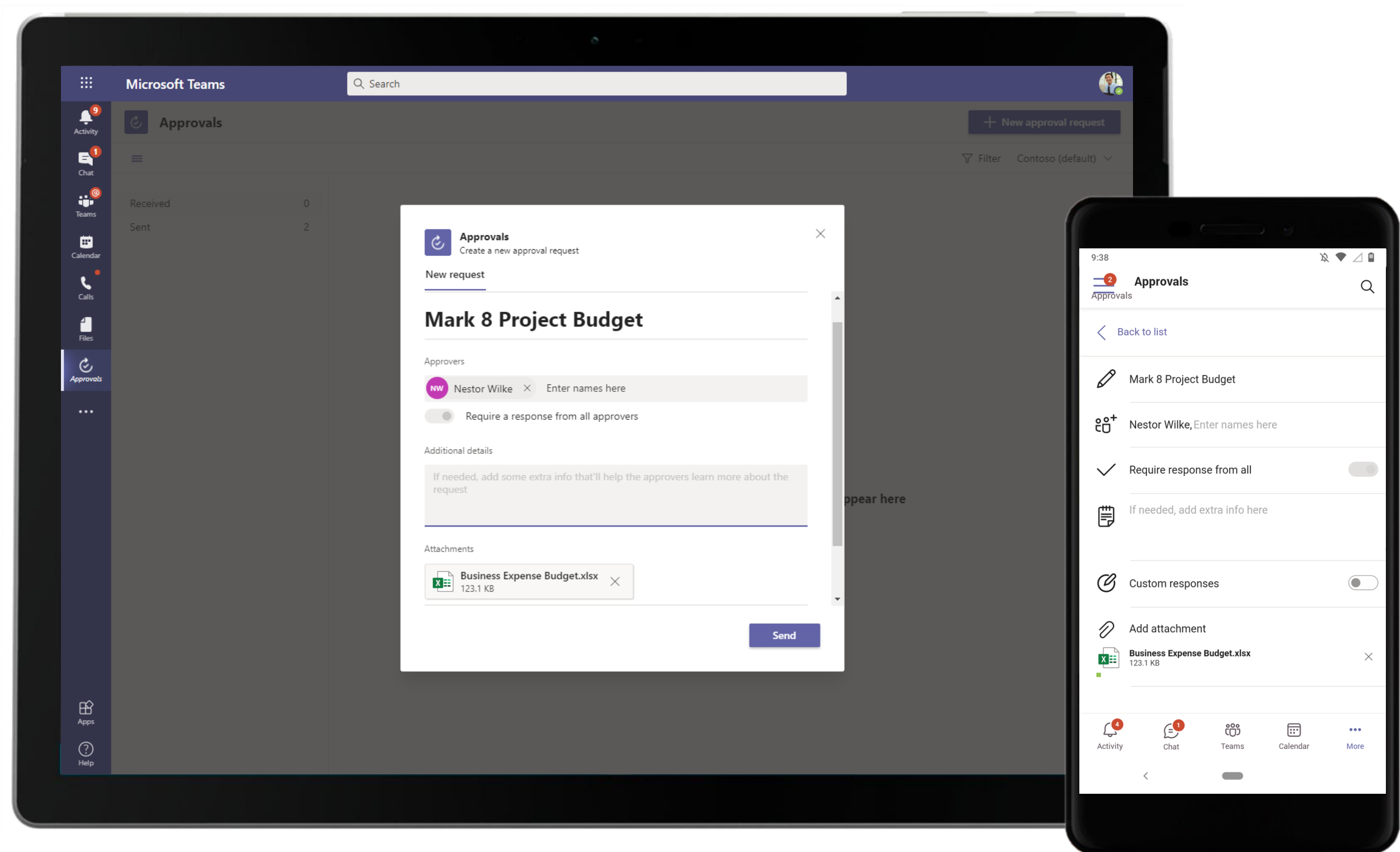
The Project Manager uses Excel to build and present data. Create impactful summaries of crucial data with the integrated Excel services.



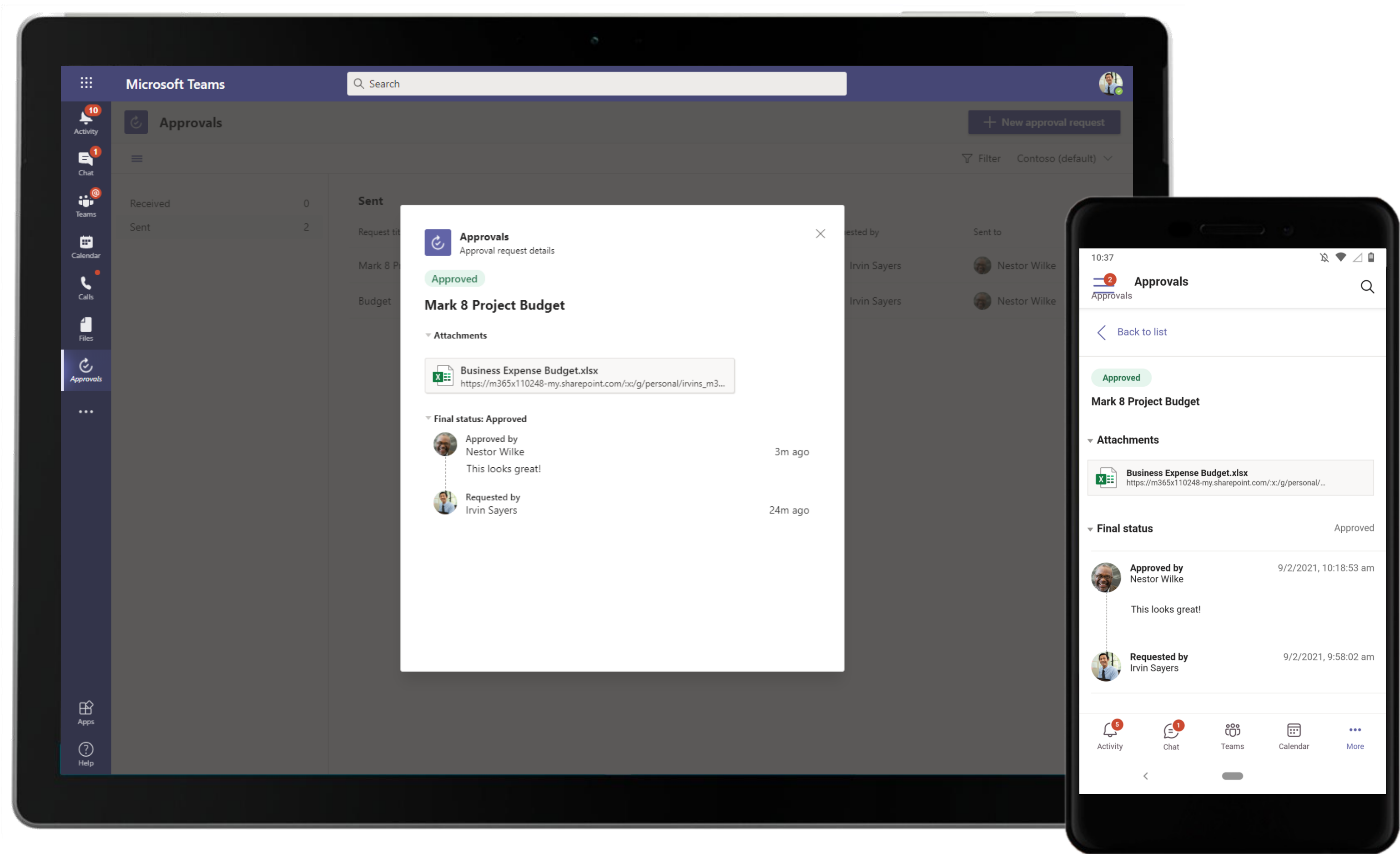
Microsoft Teams makes it easy to share files within meetings. If the files are Word, Excel, or PowerPoint files, your colleagues can even view, edit and collaborate on the files right within Teams, thanks to deeply integrated Office 365 services.



Use Excel's analytical abilities within Teams to build reports and share them with your team. The full canvas of Excel is available as a rich, integrated experience inside Teams.



Get things done quickly with the ability to review and take action right with Approvals in Microsoft Teams. Here the Project Managers attaches and sends the budget document for approval.



Track all your approvals in one place and get notified as soon as your requests are approved without leaving Microsoft Teams.



Planning Project Timelines and Resources

Project Manager

Scenario Walkthrough

Planning is crucial in meeting project deadlines. First, Contoso will have to define the project's scope and determine available resources. For this, the Project Manager sets time estimates and evaluates the team and the team's capabilities realistically. Here is how he leverages Microsoft Teams to ease his tasks and communicate with personas across the organization.

- Looks for a free time slot via Calendar Bot and schedules a meeting to discuss the way forward.
- Discusses the project timelines during the call via Roadmap – Microsoft Project
- Assigns tasks and discusses the requirements to accomplish project goals on time via Project
- Communicates with Team Lead to note down a list of resources required for the project.
- Reviews the list of available resources along with the ones that need to be hired and gives the go-ahead to HR Executive.

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

- Enables calendar comparison and scheduling a meeting in a free time slot.
- Keep track of many projects at once with Roadmap
- Stay organized, focused, and in charge with Microsoft Project
- Collaborate on digital content and share it with the team using Evernote.

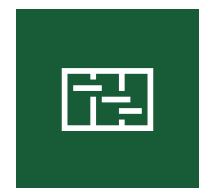
Which app integrations on Teams made it possible?



Calendar BOT



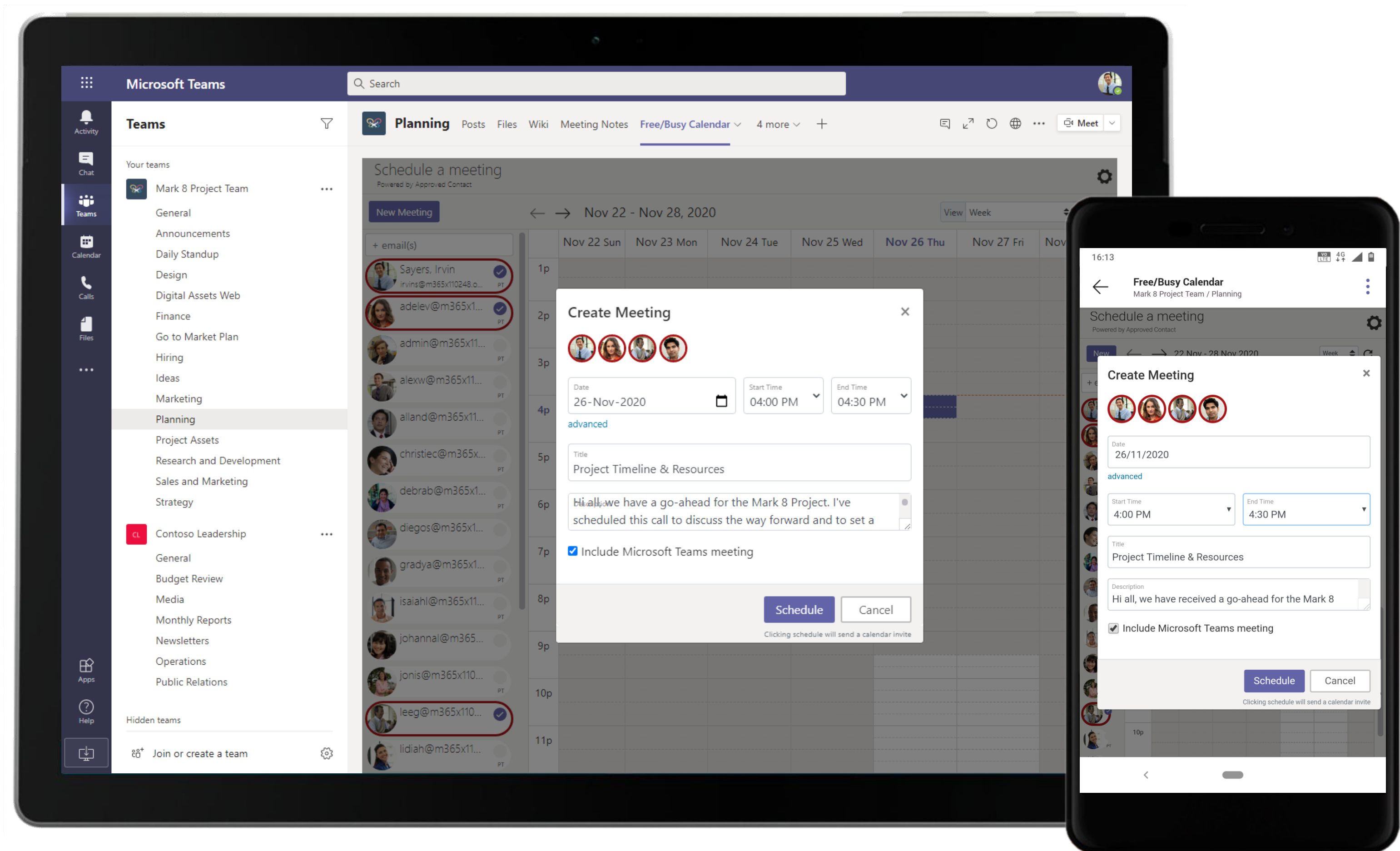
Evernote



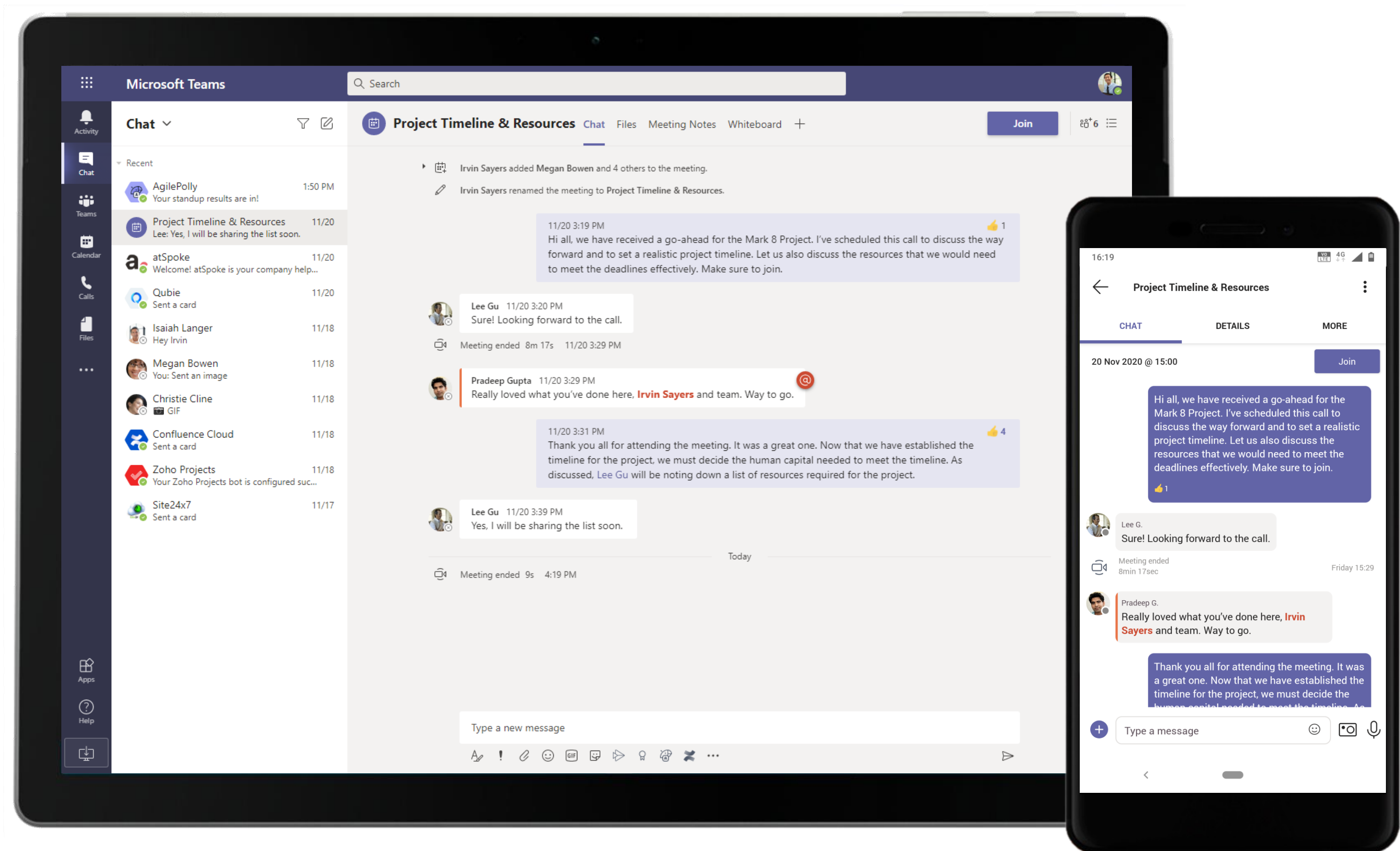
Roadmap –
Microsoft
Project



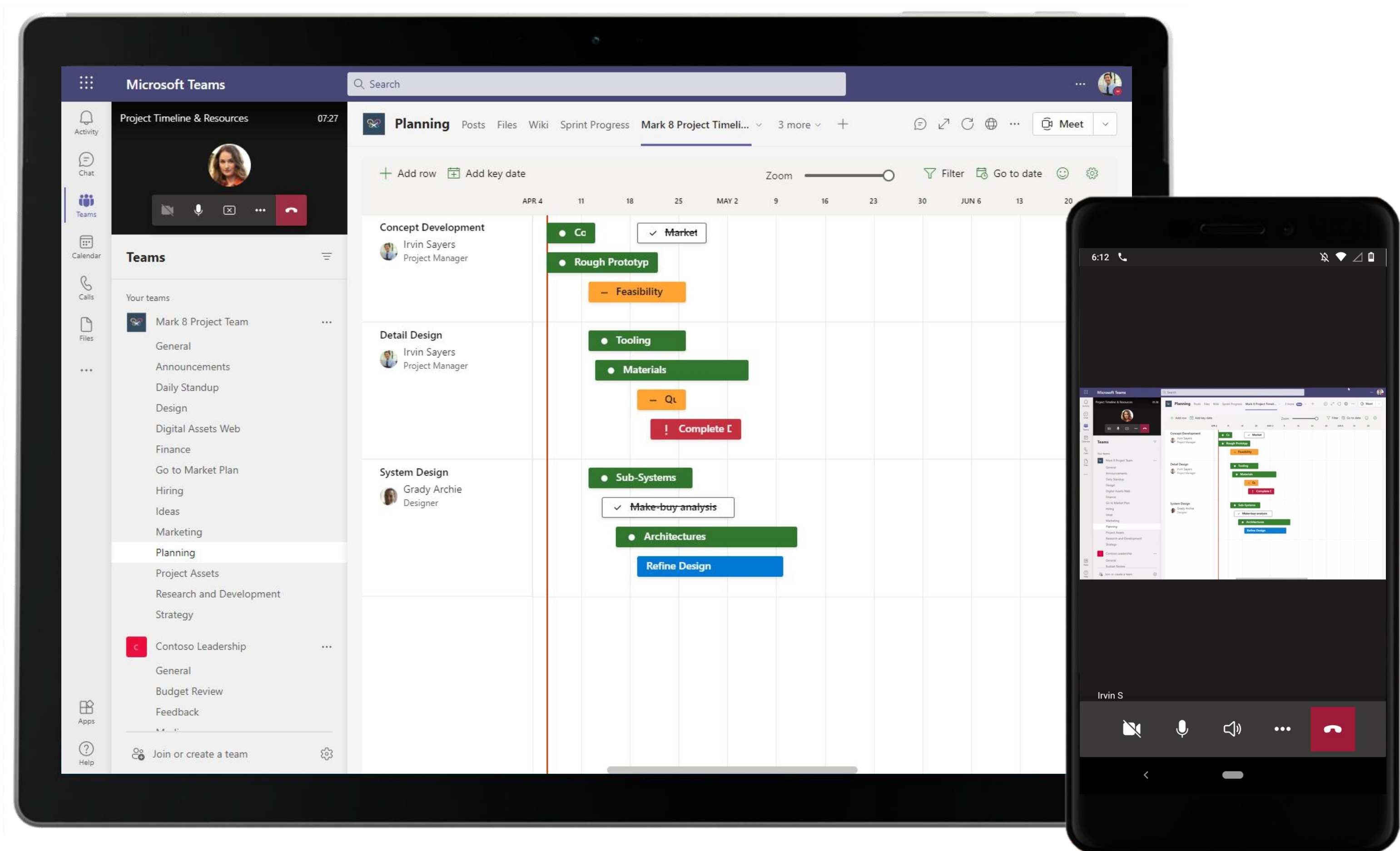
Project



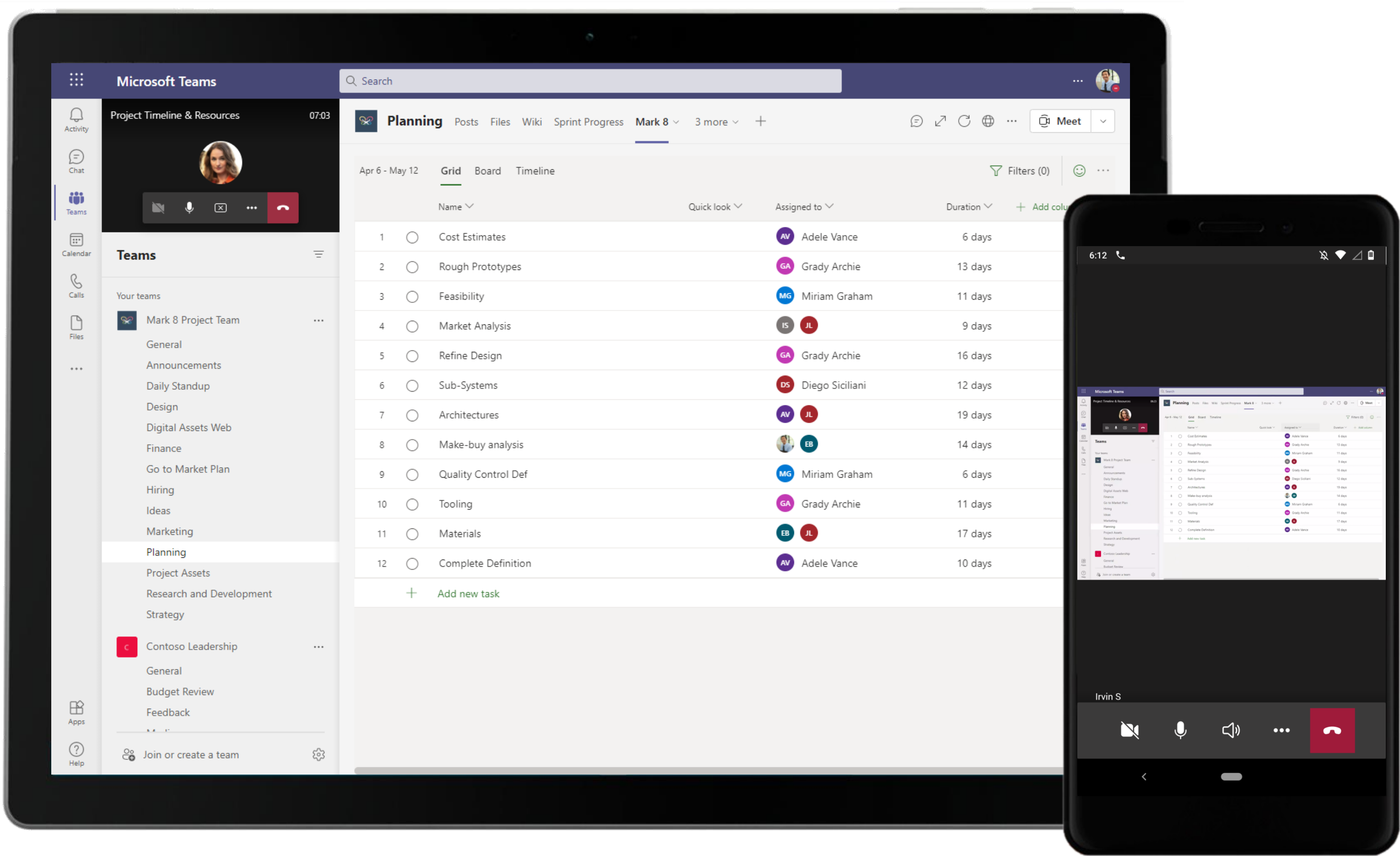
Use Calendar Bot to compare calendars and view free time slots to schedule meetings with your teammates. The Project Manager uses Calendar Bot and schedules meeting to discuss project timelines.



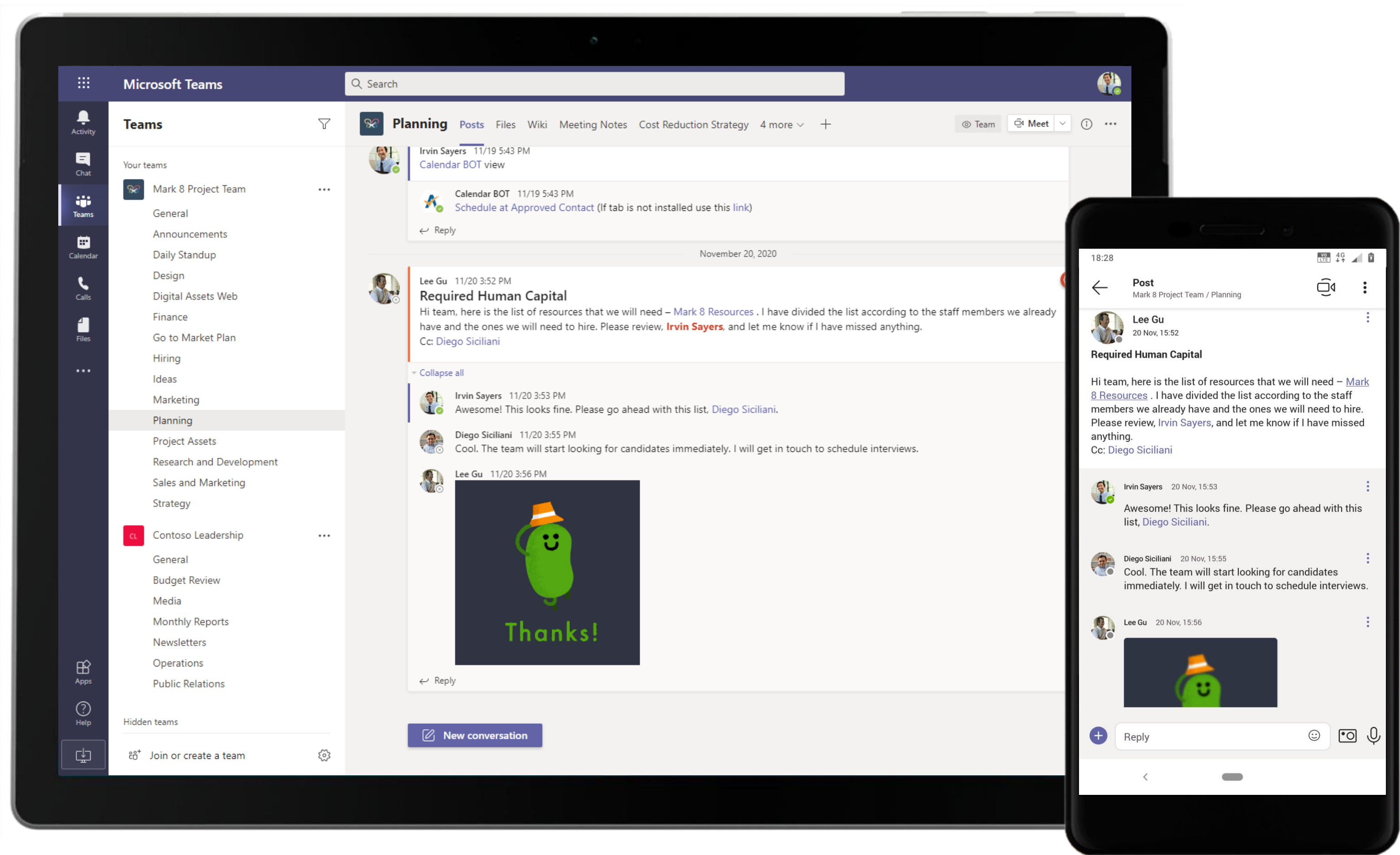
Use the meeting chat feature to take the conversation forward. The Project Manager continues to interact with the stakeholders on the meeting chat after the call is over.



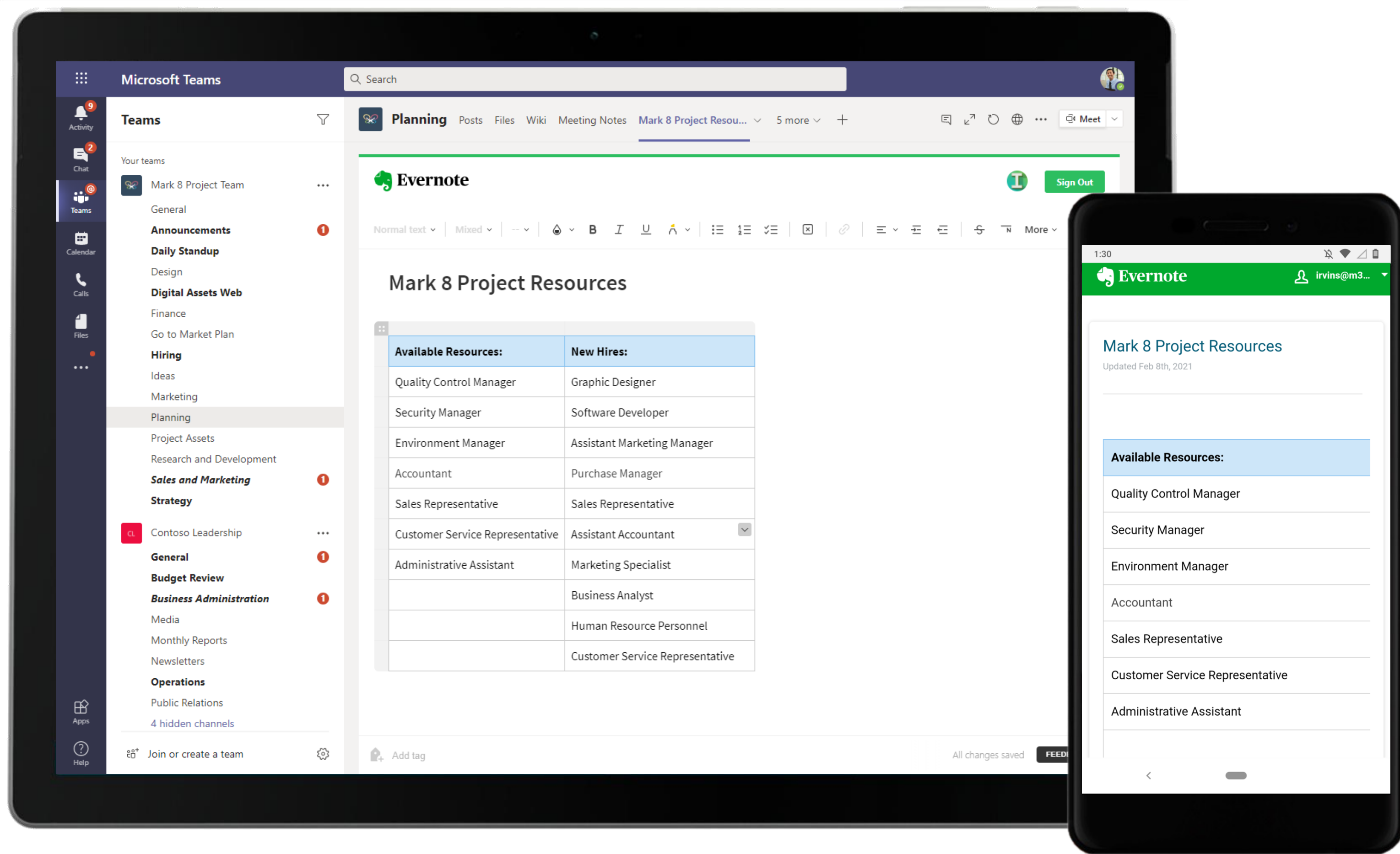
Plan large initiatives and manage your portfolio by creating a consolidated timeline view of multiple projects from Microsoft Project and Azure Boards with Roadmap – Microsoft Project. The Project Manager discusses project timelines to allocate resources and raise requirements.



Tackle anything from small projects to large initiatives with Project. Track a project to completion on grid, timeline, and board views using tasks with dependencies, assignments, and more.



Channel conversations can contain a lot things – conversations, files shared by team members, meeting threads, and GIFs! Use social features like reacting to team members’ conversations and responses to acknowledge them.



Unlock the power of teamwork—collect, organize and share information, documents and meeting notes using Evernote like the Project Manager does it here.



Implementation

Check out how the Project Management team can use Microsoft Teams to keep your business running efficiently and address unexpected situations with confidence.

Project Management Superpowers in Teams

Capabilities and features used...

- Schedule meetings using synced calendars, or a meet now feature
- Participate in instant, open-channel communication
- Store documents within a cloud-enabled repository using Files section or channel tabs
- Create and co-author documents, spreadsheets, presentations and more in the cloud with Office 365
- Channel tabs for everyone to stay on the same page
- Help safely collaborate with teammates on multiple projects from within a single environment

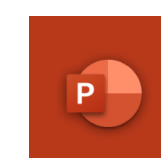
Apps that enable an immersive experience in Teams



Word



Excel



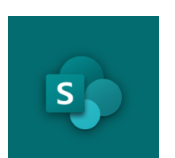
PowerPoint



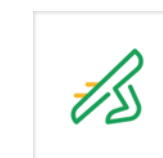
Ment.io



Lucidchart



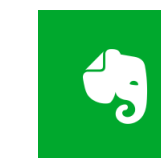
SharePoint



Zoho Sprints



Power BI



Evernote



Asana



Calendar
BOT



Kudos
Boards



Approvals



Freehand by
InVision



Zoho
Projects



Lists



Tasks by
Planner
and To Do



Workstreams.ai

Meet the Business Decision Makers

Project Management



Sr. Project Manager

"Treat people like they make a difference, and they will."

- Provide on-site leadership for project team by motivating team members to meet project goals
- Prepare estimates and detailed project plan for all phases of the project
- Procure adequate resources to achieve project objectives



Finance Manager

"Financial fitness is not a pipe dream or a state of mind. It's a reality if you are willing to pursue it and embrace it."

- Review financial reports and build budget plans
- Prepare activity reports and financial forecasts
- Identify ways to improve profitability
- Analyze markets for business opportunities



Managing Reports and Project Documents

Project Manager with Finance Manager

Scenario Walkthrough

The Project Manager must maintain final reports and document the product journey to quantify work performed and completed in measurable terms. The Finance Manager seeks help from the Project manager to connect with the Sales and Marketing team and obtain comprehensive reports documenting the success of the product in the current market. Here's how the Finance Manager collaborates with the Project Manager using Microsoft Teams in her daily tasks.

- Attends a scheduled meeting and discusses important updates and further action with the Project Manager.
- Receives a notification from the Sales Manager and Marketing Manager to get her attention on crucial project documentation.
- Reviews the sales documents shared within the channel using Word and PowerPoint.
- Creates a dashboard of product profitability matrix using Power BI Statistics.

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

- Effective channel communication with @mention to catch each other's attention instantly.
- Create clear and concise presentations with PowerPoint in Teams.
- Co-author documentation through established channels and collaborate using Office applications like Word.
- Facilitation of data-driven decisions informed by visualizations and scoring in Power BI for Microsoft Teams.

Which app integrations on Teams made it possible?



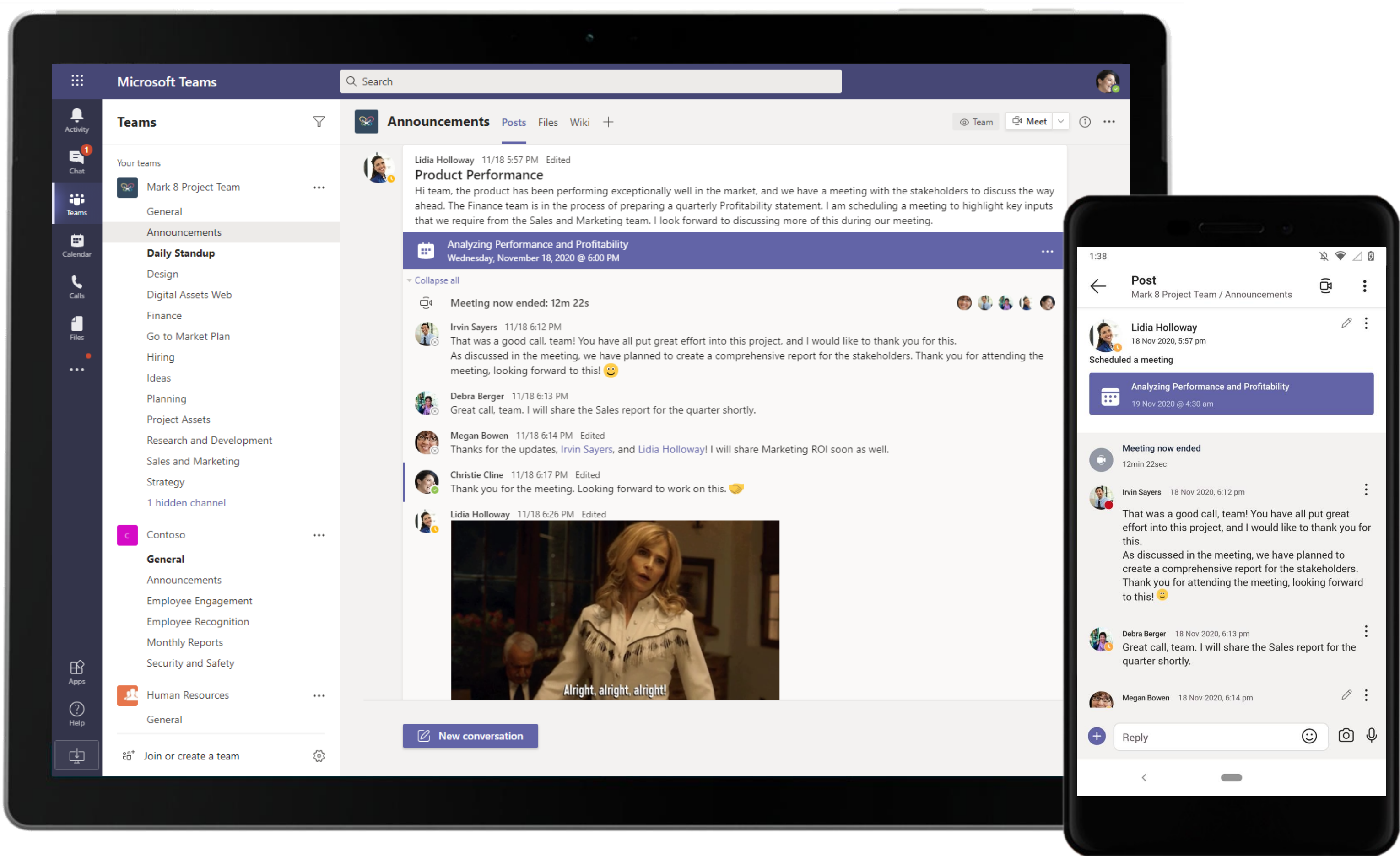
PowerPoint



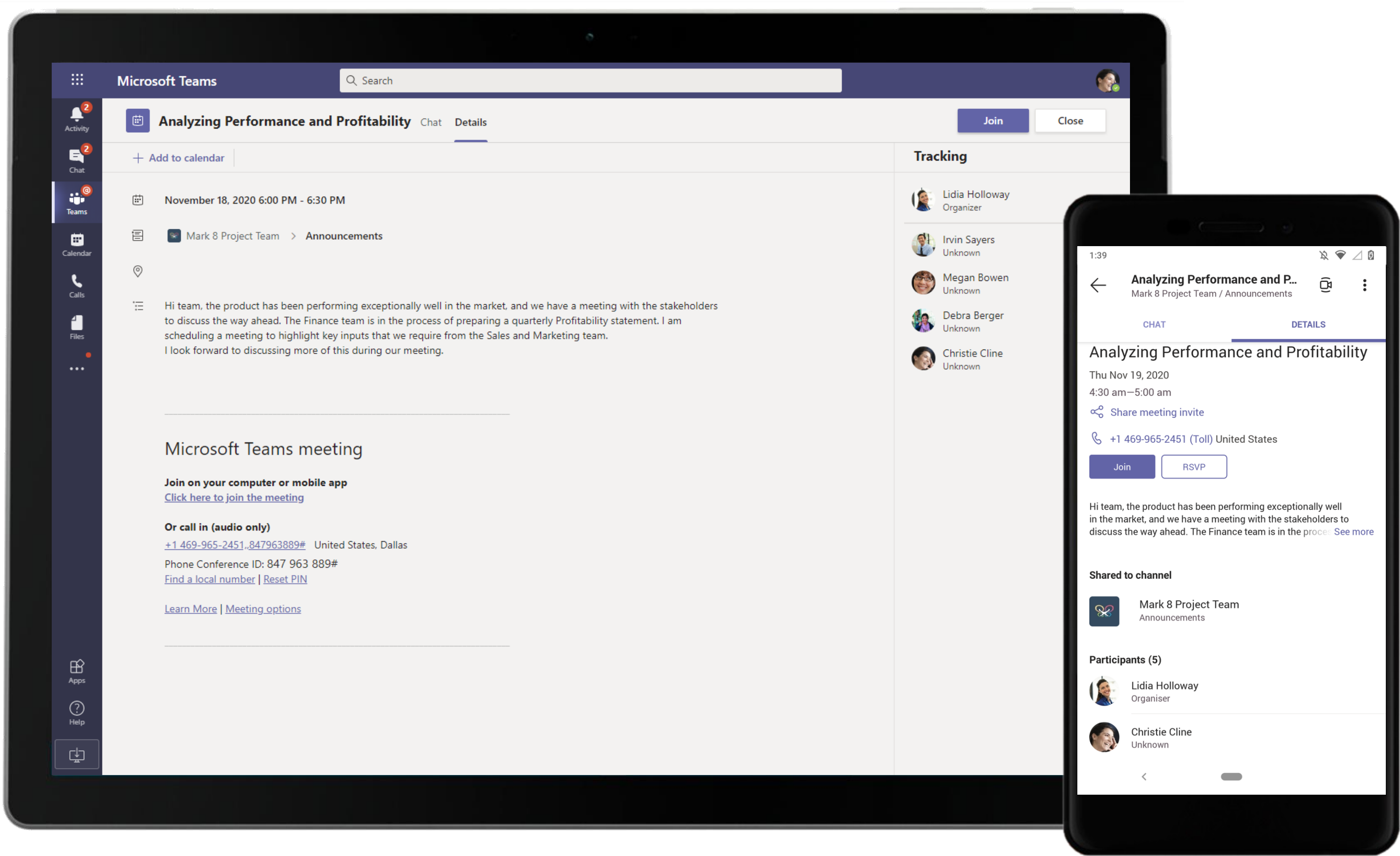
Power BI



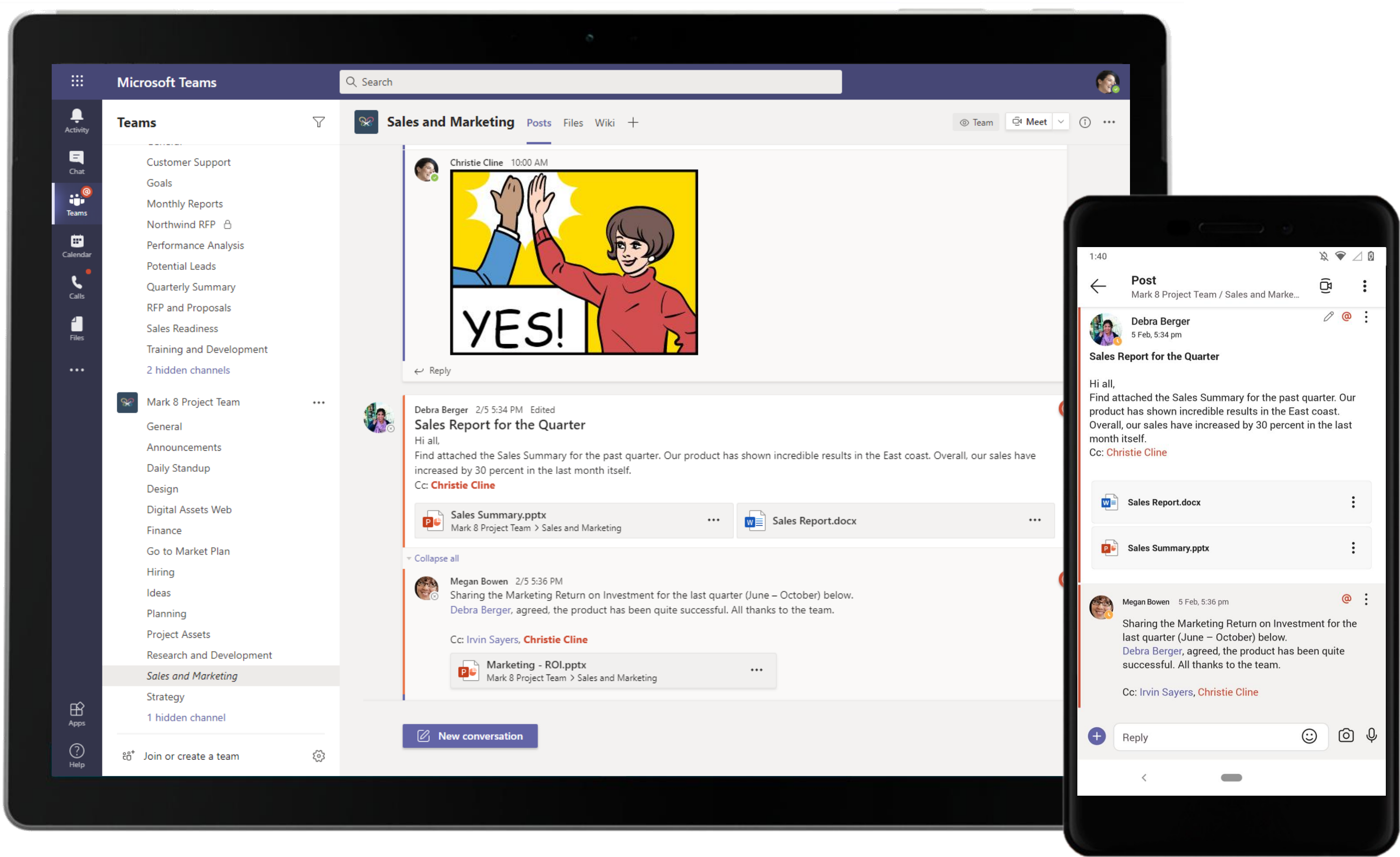
Word



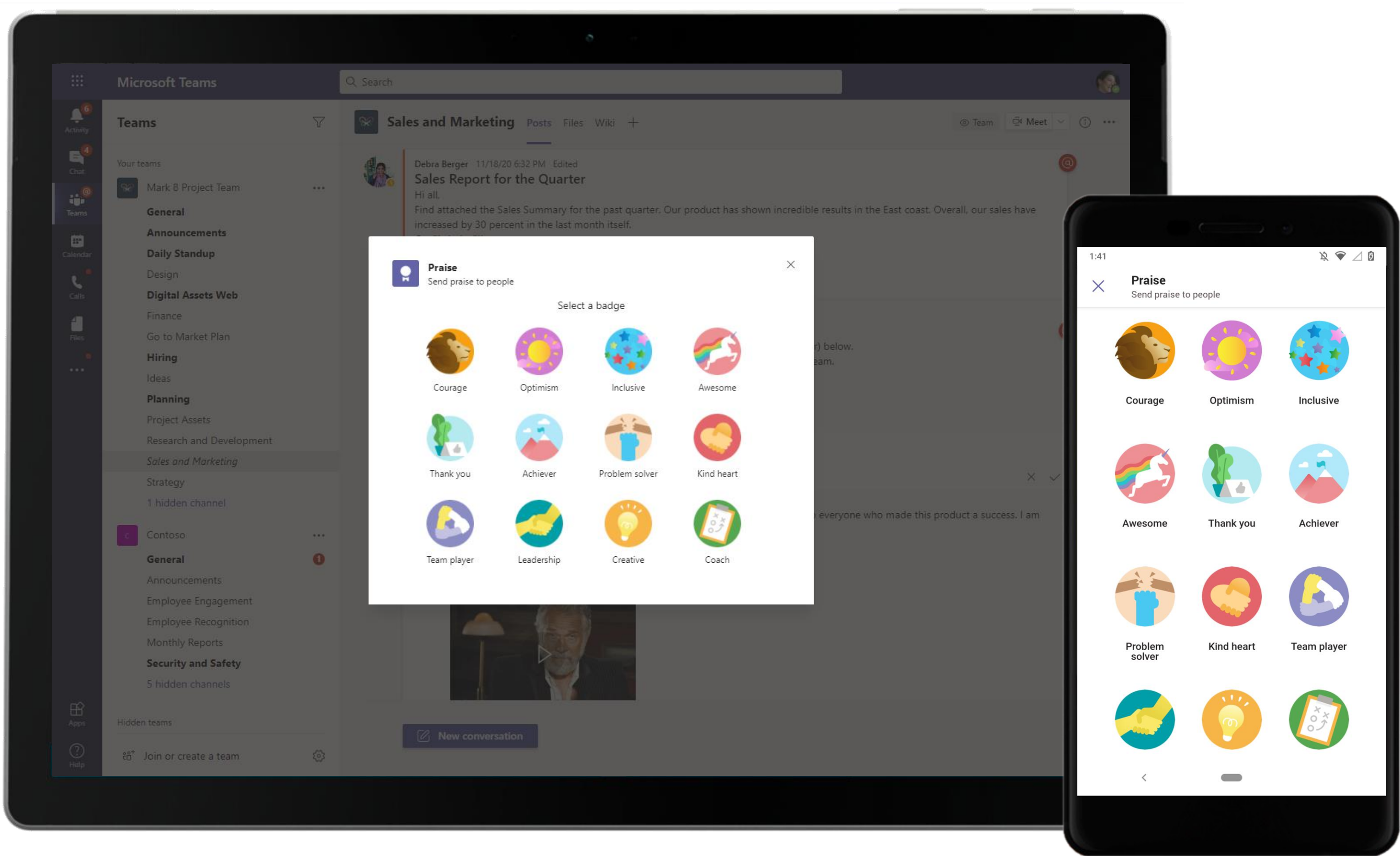
The Sales Manager posts a message in the channel to provide the Sales and Finance teams context about the meeting and the objective behind the collaboration.



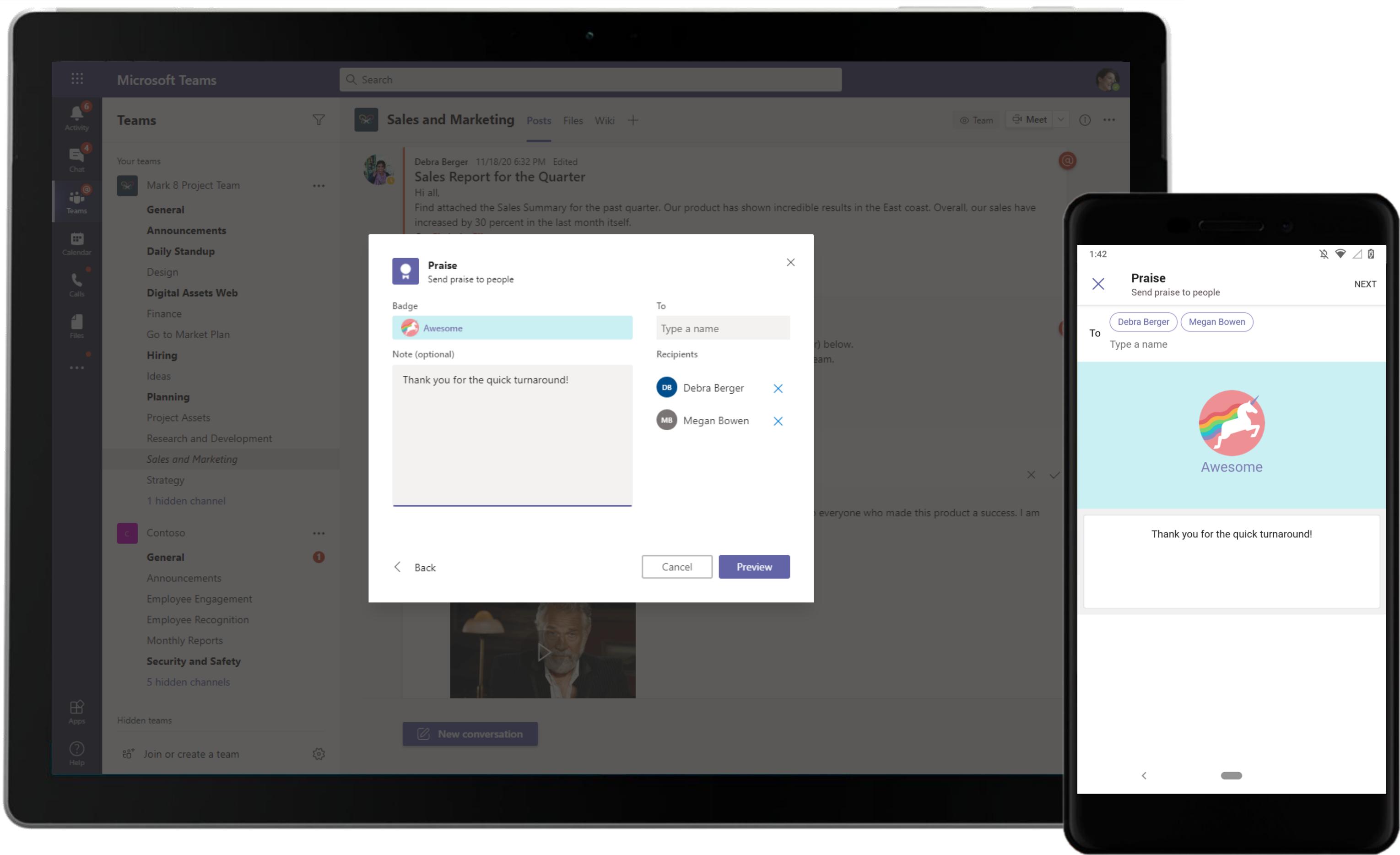
Meetings in Teams include audio, video and file sharing. And because they're online, you'll have a meeting space and never need to find a room or projector to share ideas.



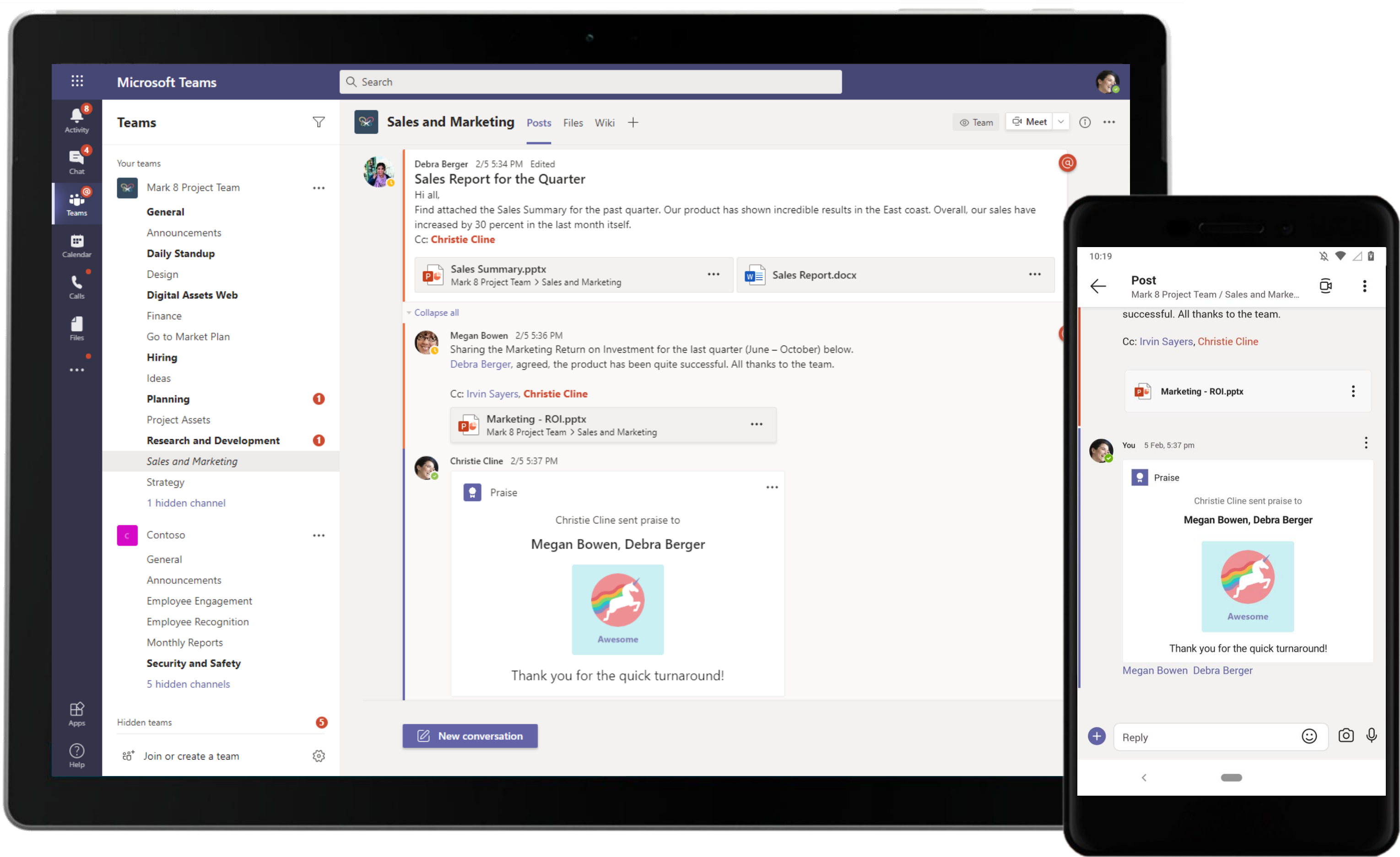
Microsoft Teams conversations are threaded so users can reply directly in-context to specific conversations, while keeping relevant discussions and files grouped together.



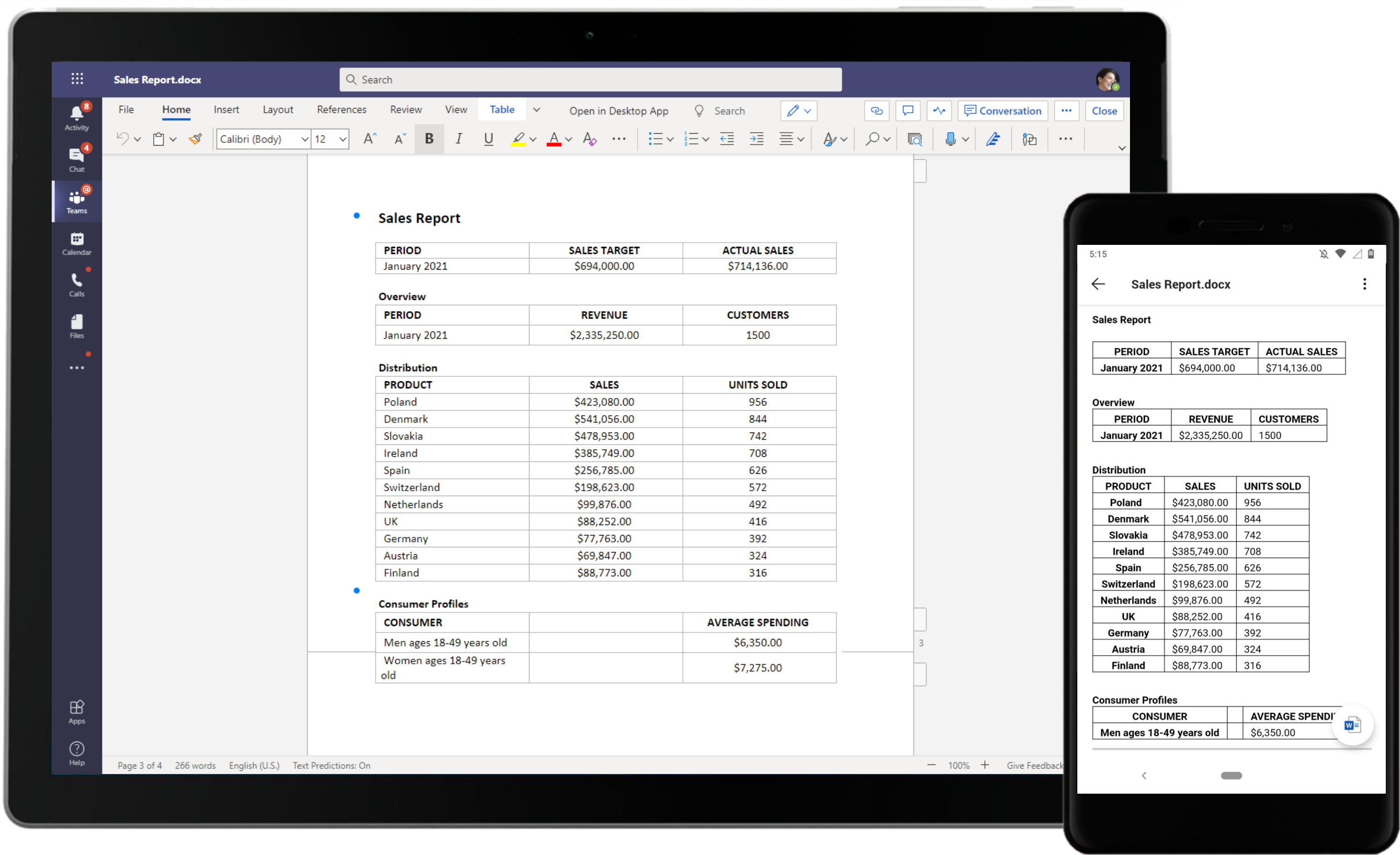
Praise lets you choose between multiple badges allowing you to customize your appreciation based on the occasion. The Vice President chooses between multiple badges to express appreciation for the Chief of Staff.



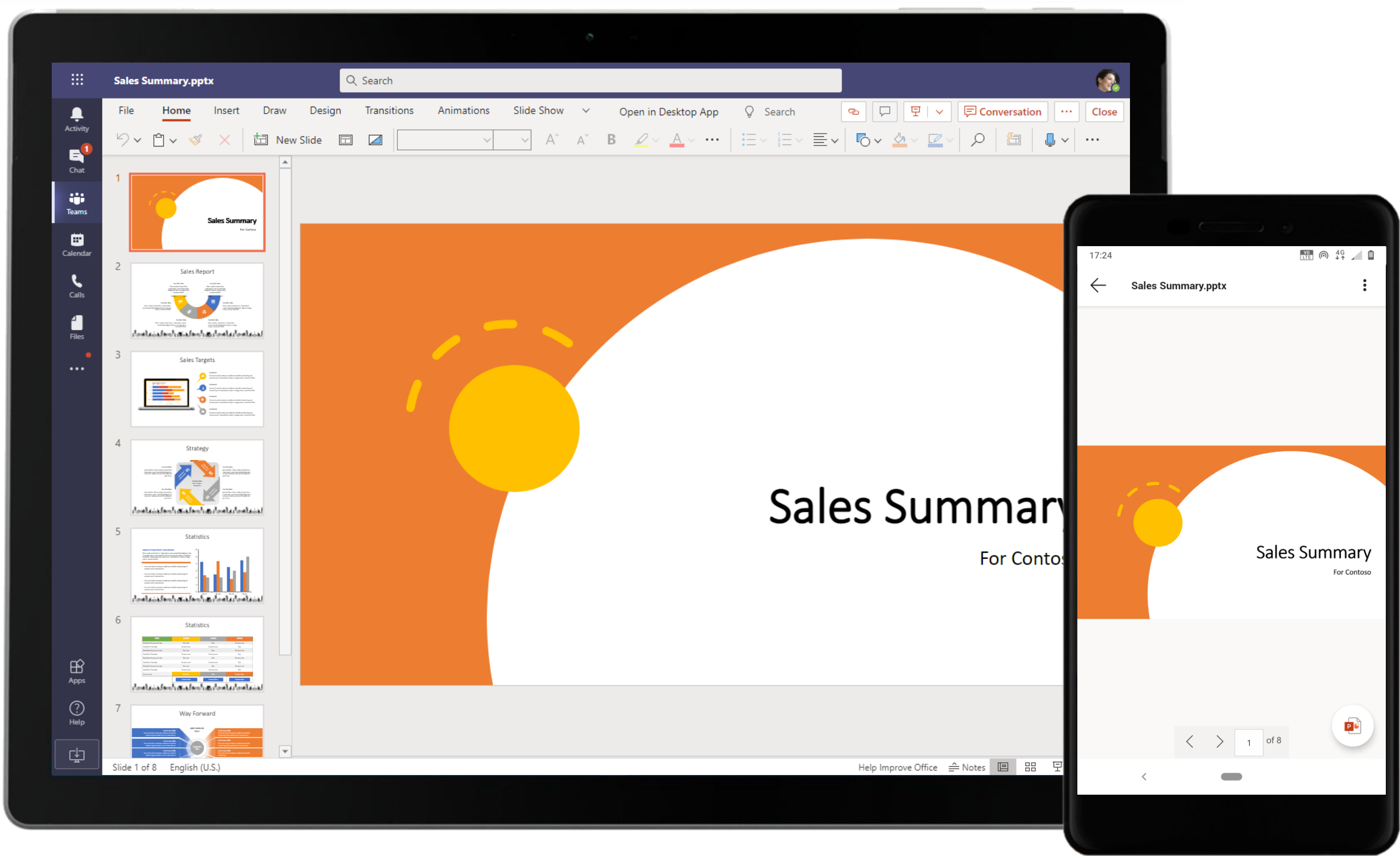
Add the name of the person or people you want to praise along with a customized note to show your appreciation with Praise.



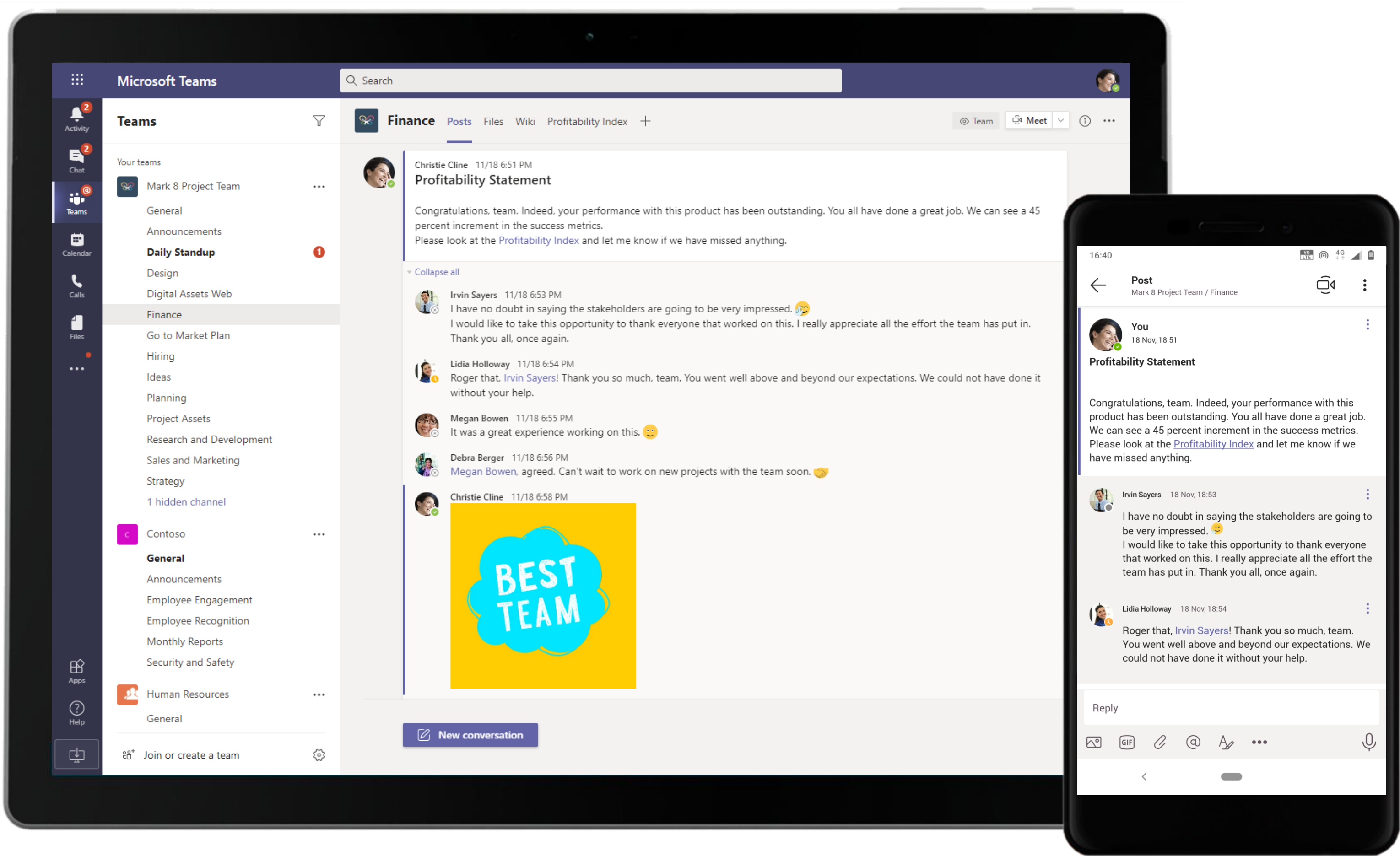
Send acclaim to your employees and coworkers with Praise. Deliver in a chat, or for wider recognition, send it in a channel conversation. Revel in the good vibes.



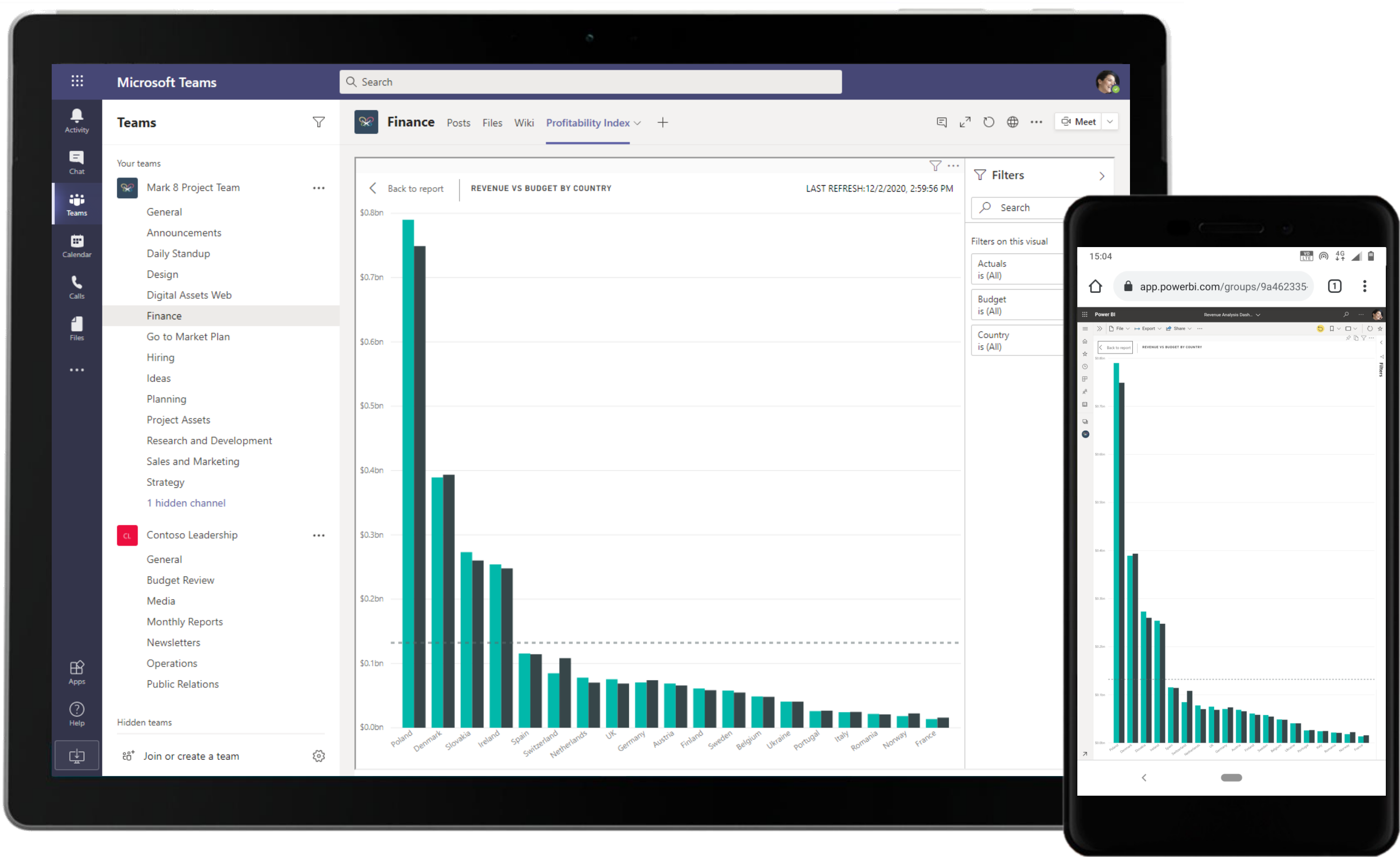
Enjoy powerful document creation and editing with the complete canvas and toolset of Word right inside Teams. Collaborate on team documents easily and store them in Files for each channel.



Create and share PowerPoint presentations over a Teams call to make meetings meaningful and to offer attendees a visual representation of key points covered.



Microsoft Teams enables transparent communications through channel conversations. The Finance Manager communicates in open-channel conversations and keeps team members up-to-date.



Turn your unrelated sources of data into coherent, visually immersive, and interactive insights with Power BI in Microsoft Teams. The Finance Manager creates a dashboard of profitability metrics using Power BI.



Identify High Priority Tasks and Unblock Workstreams

Senior Project Manager

Scenario Walkthrough

The Senior Project Manager views 'High Priority' tasks assigned to her across projects to take quick action and ensure that these teams function seamlessly. She notices two high priority tasks assigned to her from the Marketing team and leverages powerful communication tools to take quick actions and to make sure that the workstreams are not blocked on her approval and inputs flow smoothly without affecting the deadlines.

- Views the high priority tasks assigned to her across projects via Tasks by Planner and To Do.
- Notifies the Marketing team regarding her availability for a meeting to review the content calendar via channel communications.
- Reviews the social media content calendar and suggests changes using the Lists app.
- Addresses the second assigned task and attaches the project roadmap template within the Planner task for reference.
- Reaches out to the Designer to update him regarding the file shared and to ensure that the team is not blocked on anything else via 1:1 chat.

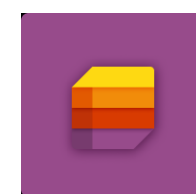
How did Teams help the Sr. Project Manager execute her roles and responsibilities?

- Stay abreast of tasks assigned to you across teams and filter by priority with Tasks by Planner and To Do.
- Create a new list from scratch, from templates, based on an existing list, or by importing data from Excel using Lists.
- @mention to get the attention of relevant team members for quick action
- Share presentations with rich visual content over the cloud with PowerPoint

Which app integrations on Teams made it possible?



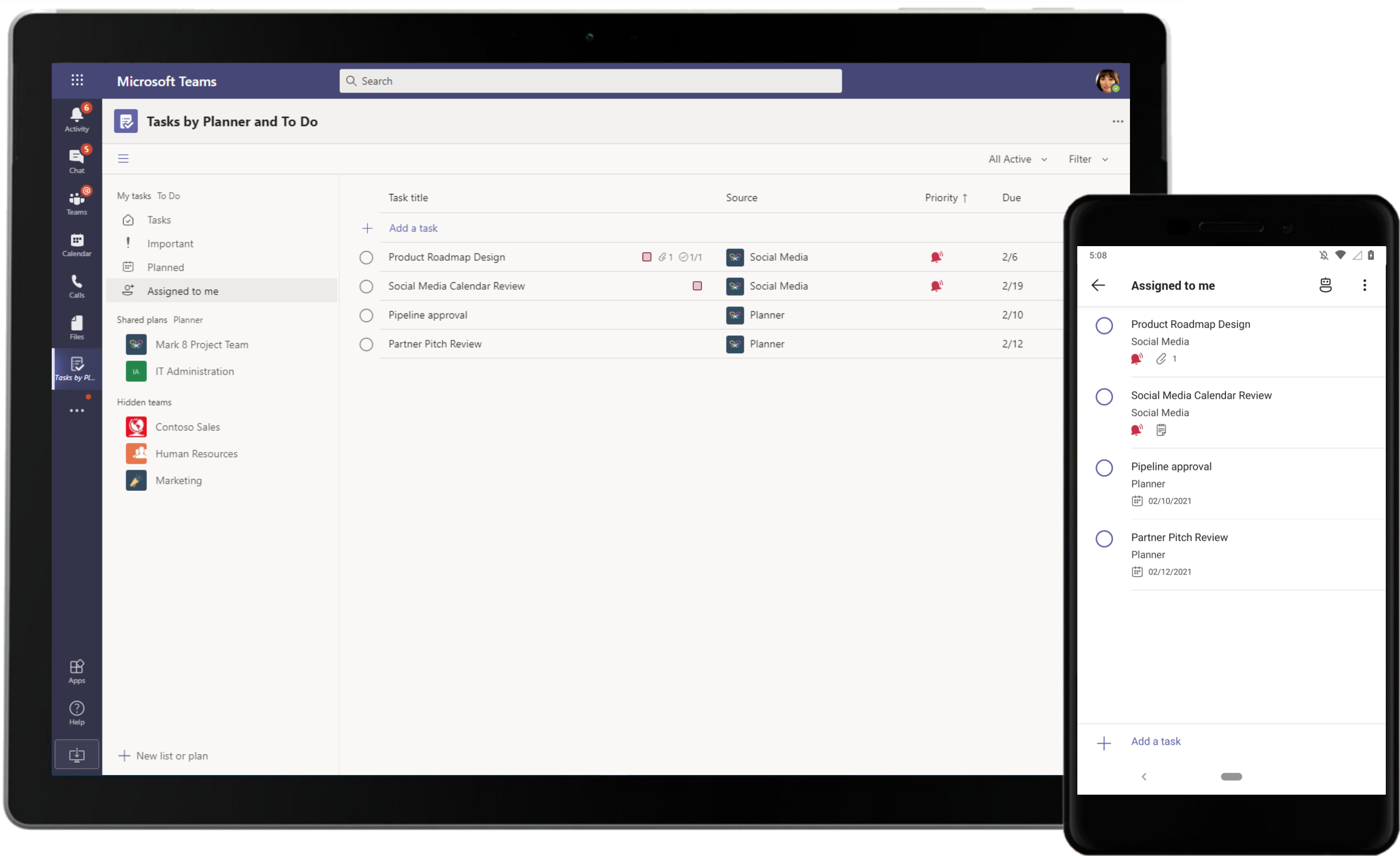
PowerPoint



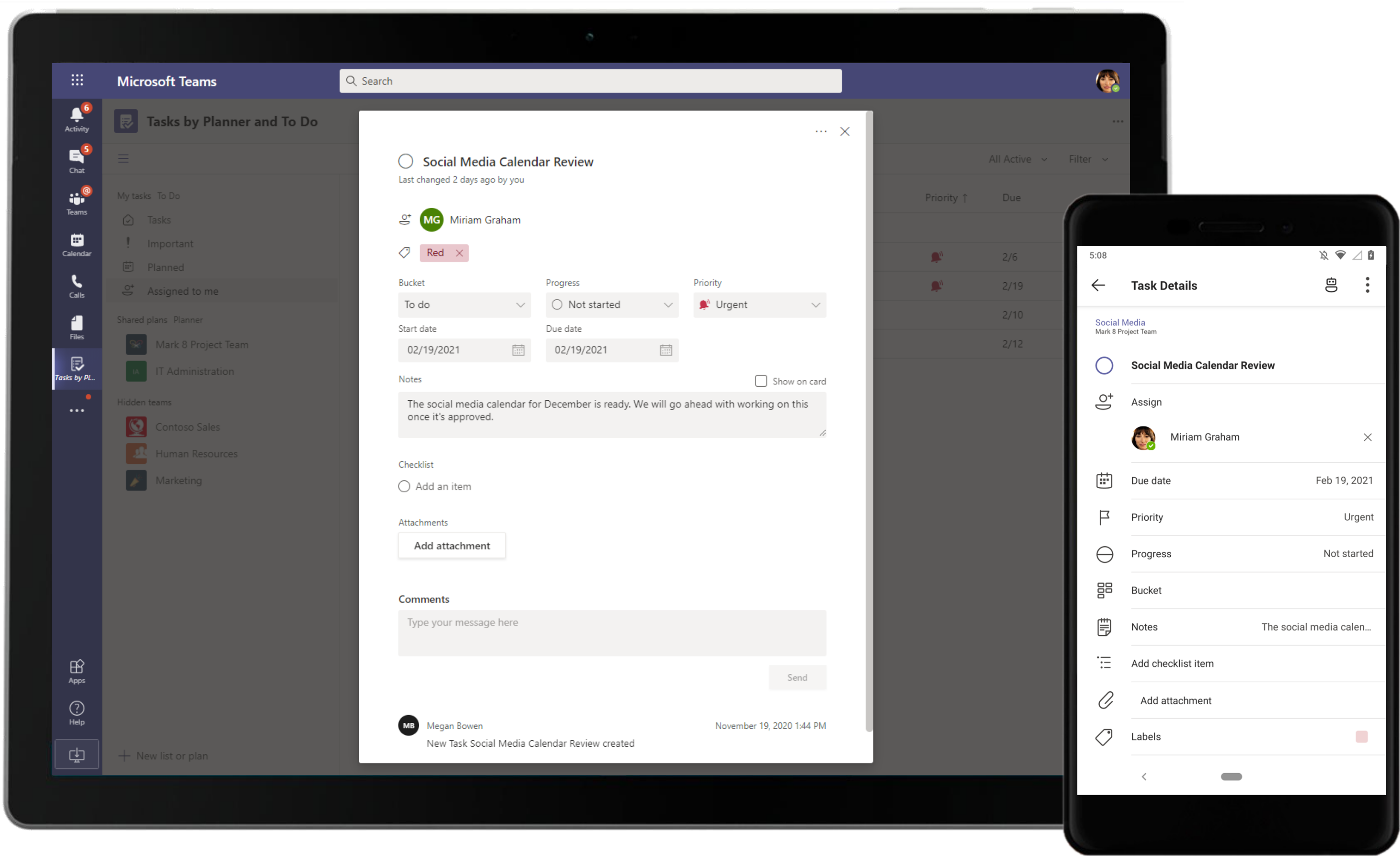
Lists



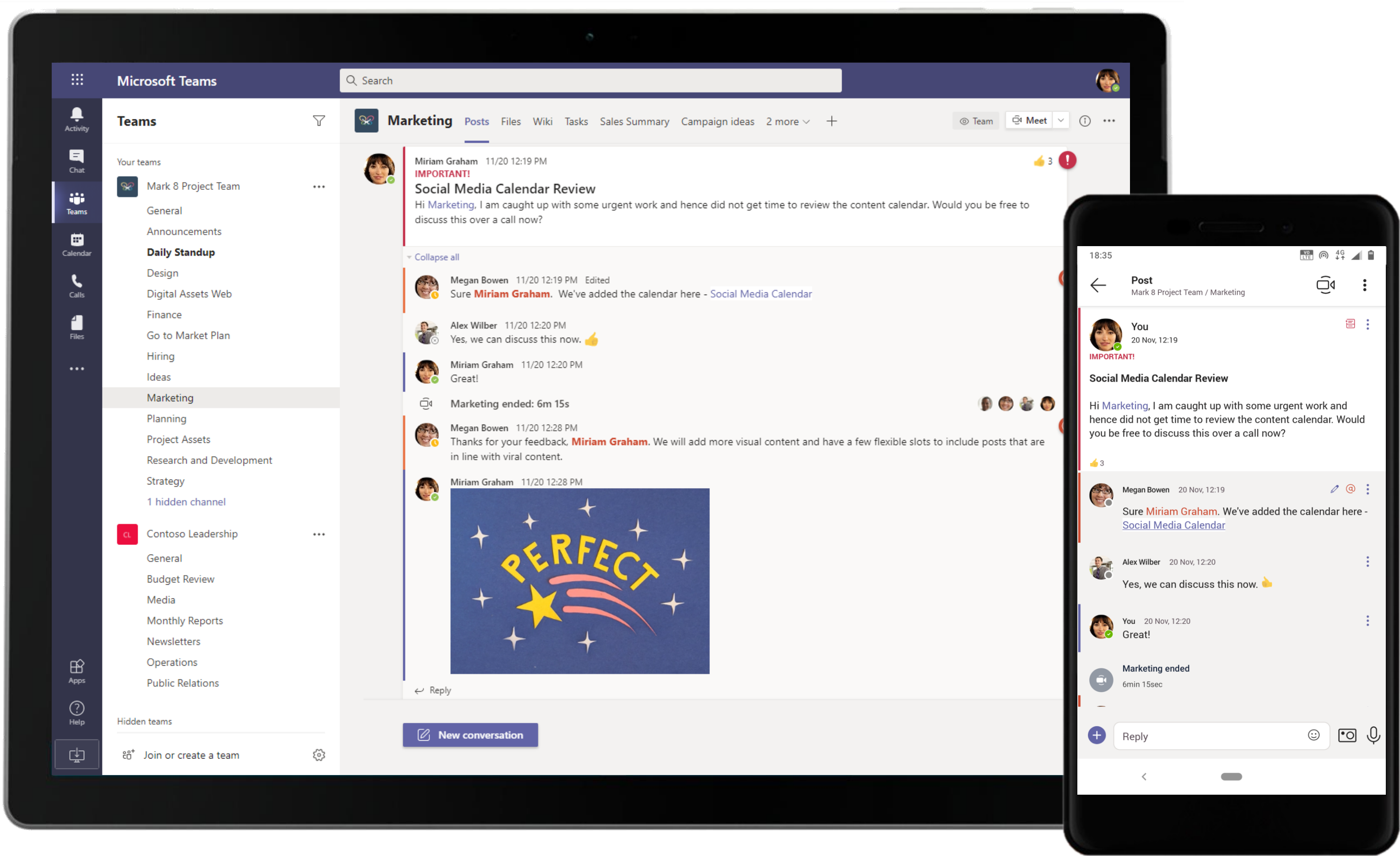
Tasks by
Planner and
To Do



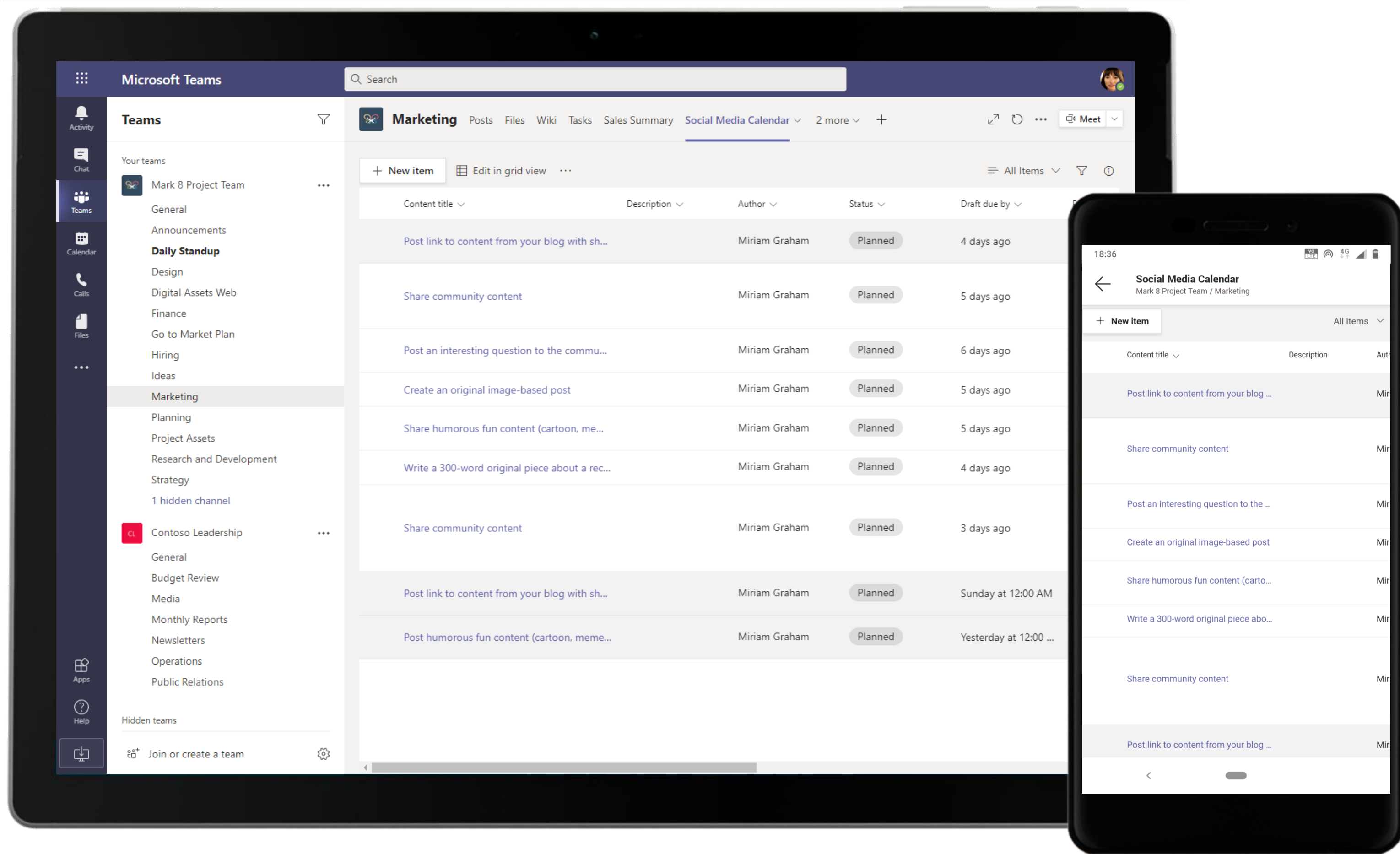
The interactive Tasks by Planner and To Do personal tab is great for collaborative task management and tracking. The Senior Project Manager uses Tasks by Planner and To Do within Teams to view high priority tasks assigned to her.



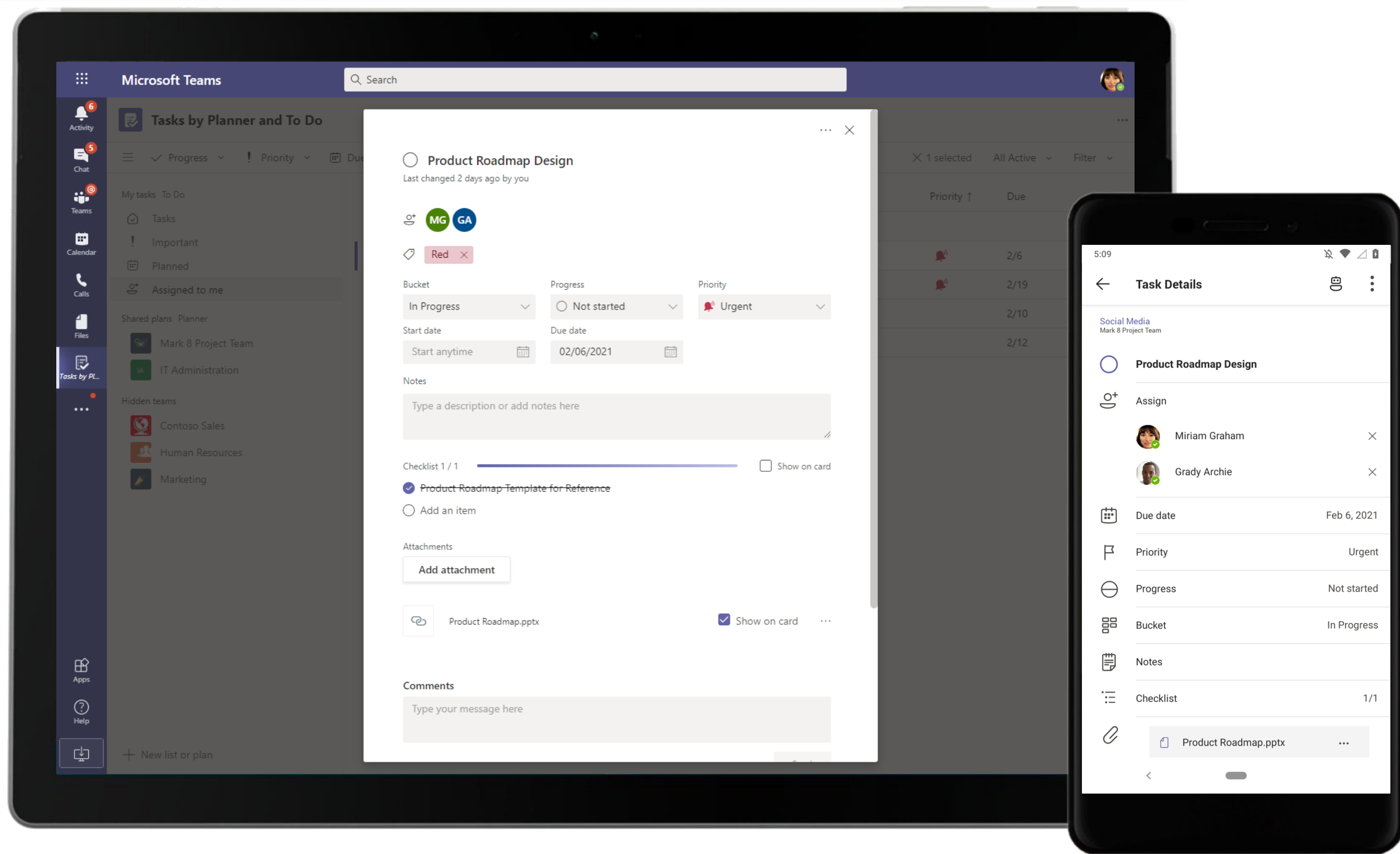
Assign, track and communicate tasks and milestones without having to switch apps using Tasks by Planner and To Do inside Teams. The Senior Project Manager notifies the social media team that the calendar is ready.



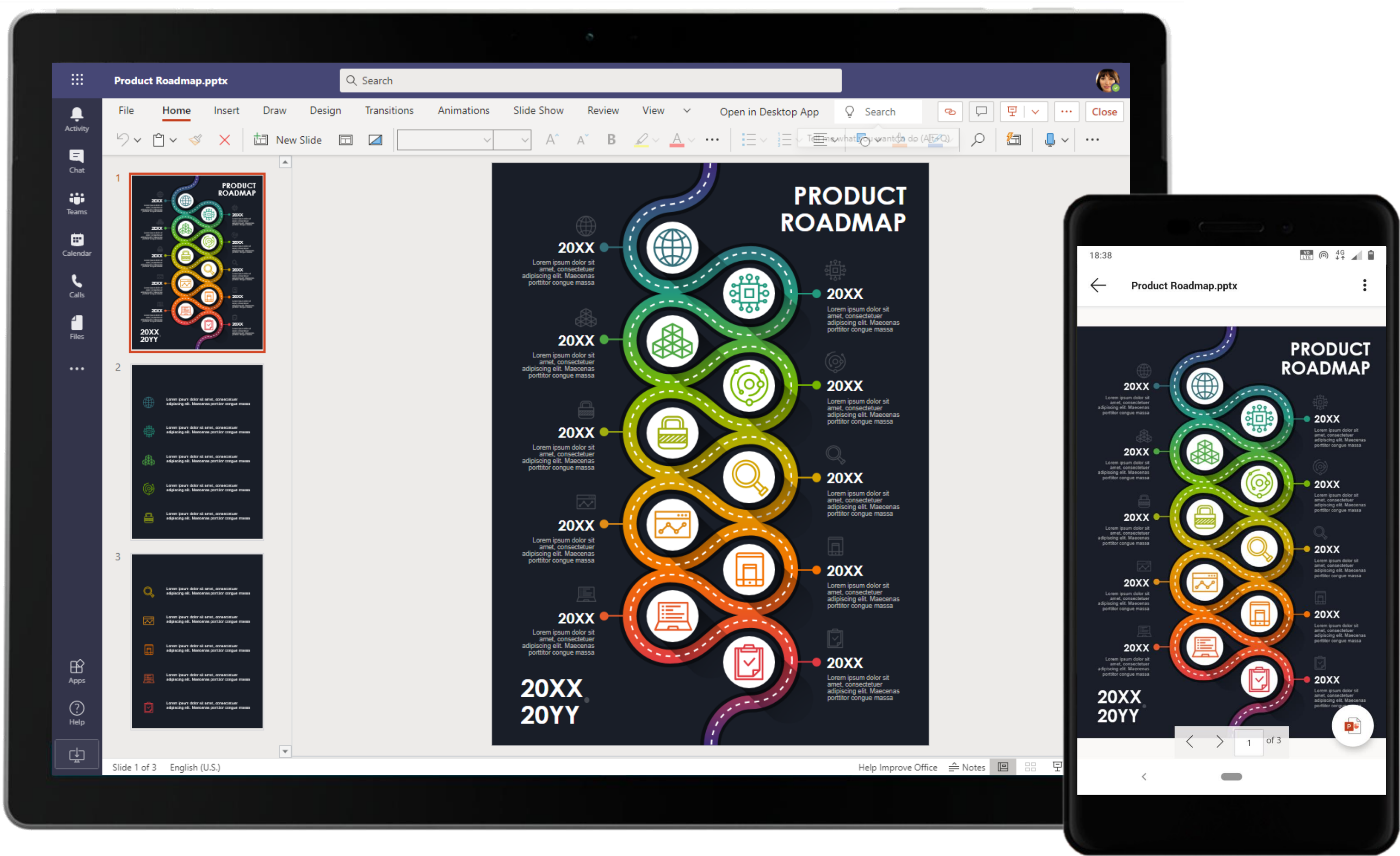
Collaborate with your team through channel communications using @mention to tag required personnel and keep conversations around the topic in a single thread. The team schedules meetings and shares files within the same thread too.



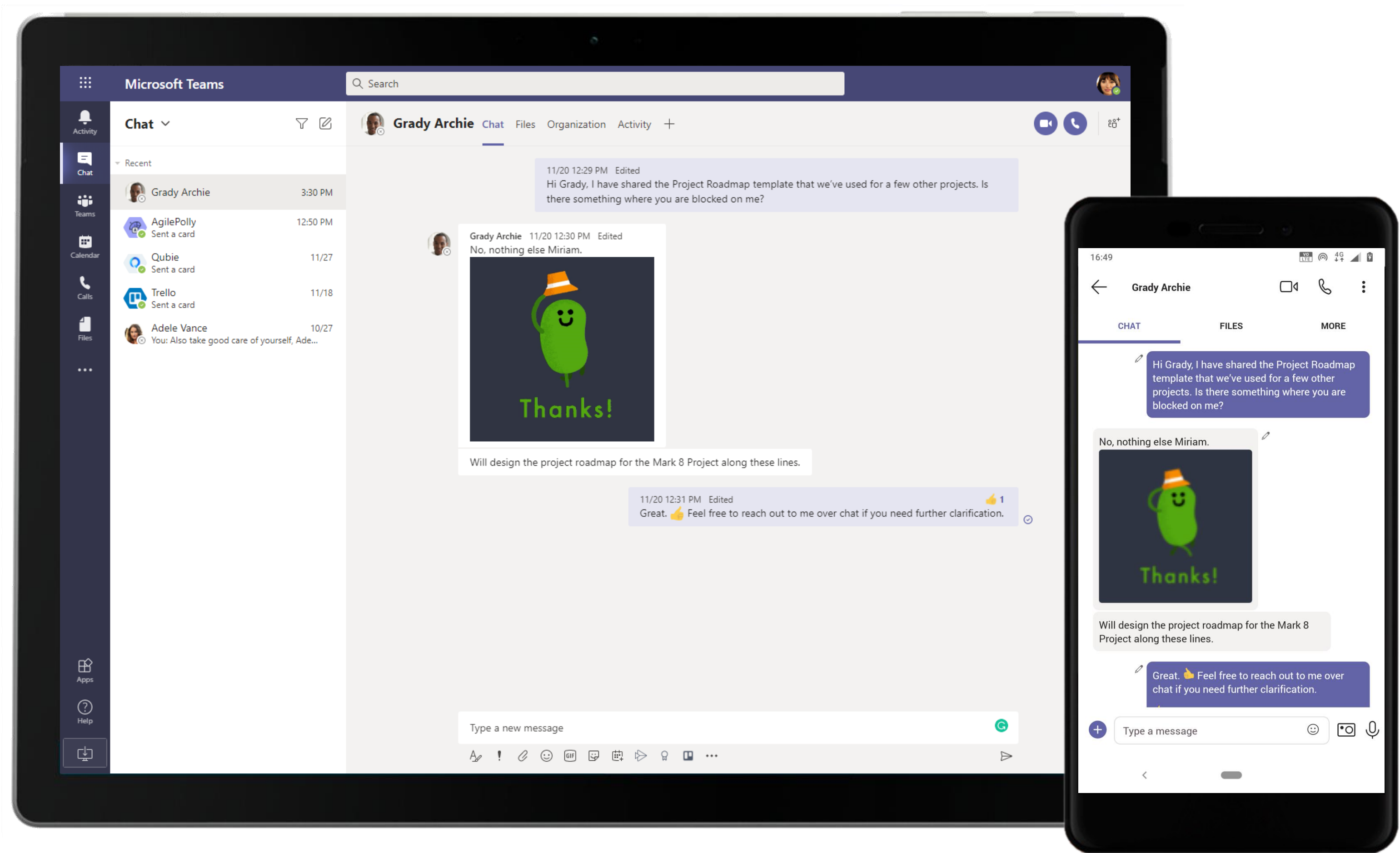
Record data, have conversations about list items, organize process, and track status in an environment built for teamwork and collaboration with Lists in Teams. The Senior Project Manager reviews and makes changes in the social media calendar using Lists.



Record data, have conversations about list items, organize process, and track status in an environment built for teamwork and collaboration.



Create and share PowerPoint presentations over a Teams call to make meetings meaningful and to offer attendees a visual representation of key points covered.



Quickly reach out to and chat with co-workers. Take conversations offline from channels for 1:1 discussions. The Senior Project Manager provides a quick update over chat.



Meetings & Coordination

Check out how the Project Management team can use Microsoft Teams to keep your business running efficiently and address unexpected situations with confidence.

Project Management Superpowers in Teams

Capabilities and features used...

- Schedule meetings using synced calendars, or a meet now feature
- Participate in instant, open-channel communication
- Store documents within a cloud-enabled repository using Files section or channel tabs
- Create and co-author documents, spreadsheets, presentations and more in the cloud with Office 365
- Channel tabs for everyone to stay on the same page
- Help safely collaborate with teammates on multiple projects from within a single environment

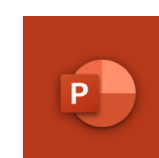
Apps that enable an immersive experience in Teams



Word



Excel



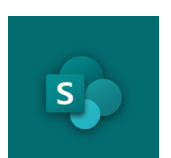
PowerPoint



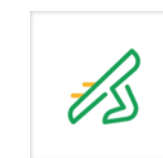
Ment.io



Lucidchart



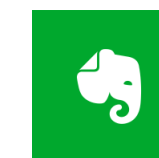
SharePoint



Zoho Sprints



Power BI



Evernote



Asana



Calendar
BOT



Kudos
Boards



Approvals



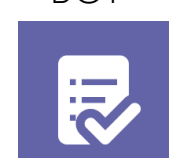
Freehand by
InVision



Zoho
Projects



Lists



Tasks by
Planner
and To Do



Workstreams.ai

Meet the Business Decision Makers

Project Management



Project Manager

"Being a Project Manager is like being an artist, you have different colored process streams combining into a work of art."

- Monitor the progress of work and assign task to employees
- Ensure on time delivery of the project
- Ensure minimum or zero bugs in the final document
- Escalate any risk or delays that can impact the project



Sr. Project Manager

"Treat people like they make a difference, and they will."

- Provide on-site leadership for project team by motivating team members to meet project goals
- Prepare estimates and detailed project plan for all phases of the project
- Procure adequate resources to achieve project objectives



Keep a Project Team In Sync and Well-informed

Sr. Project Manager

Scenario Walkthrough

Keeping projects on schedule and ensuring everyone has the latest information can be challenging when people work in different locations and projects move quickly. The Sr. Project Manager needs an easy way to make documents easily accessible, discuss and share information, and track project timelines.

- Creates a SharePoint List and SharePoint Page in channel tabs for sharing, editing project details, and timelines.
- Share the SharePoint tab links in the channel for the team's access.
- Asks the Business Analyst to share the latest version of the project scope documentation in a Word document.
- Shares a key PowerPoint presentation containing vital project standpoints.
- Shares PDFs containing previous project references.

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

- Enable easy update and tracking of important lists and pages with SharePoint.
- Co-author documentation through established channels and collaborate using Office applications like Word.
- Utilize PowerPoint to draft effective and easily consumable presentation on a proposed plan.

Which app integrations on Teams made it possible?



PowerPoint



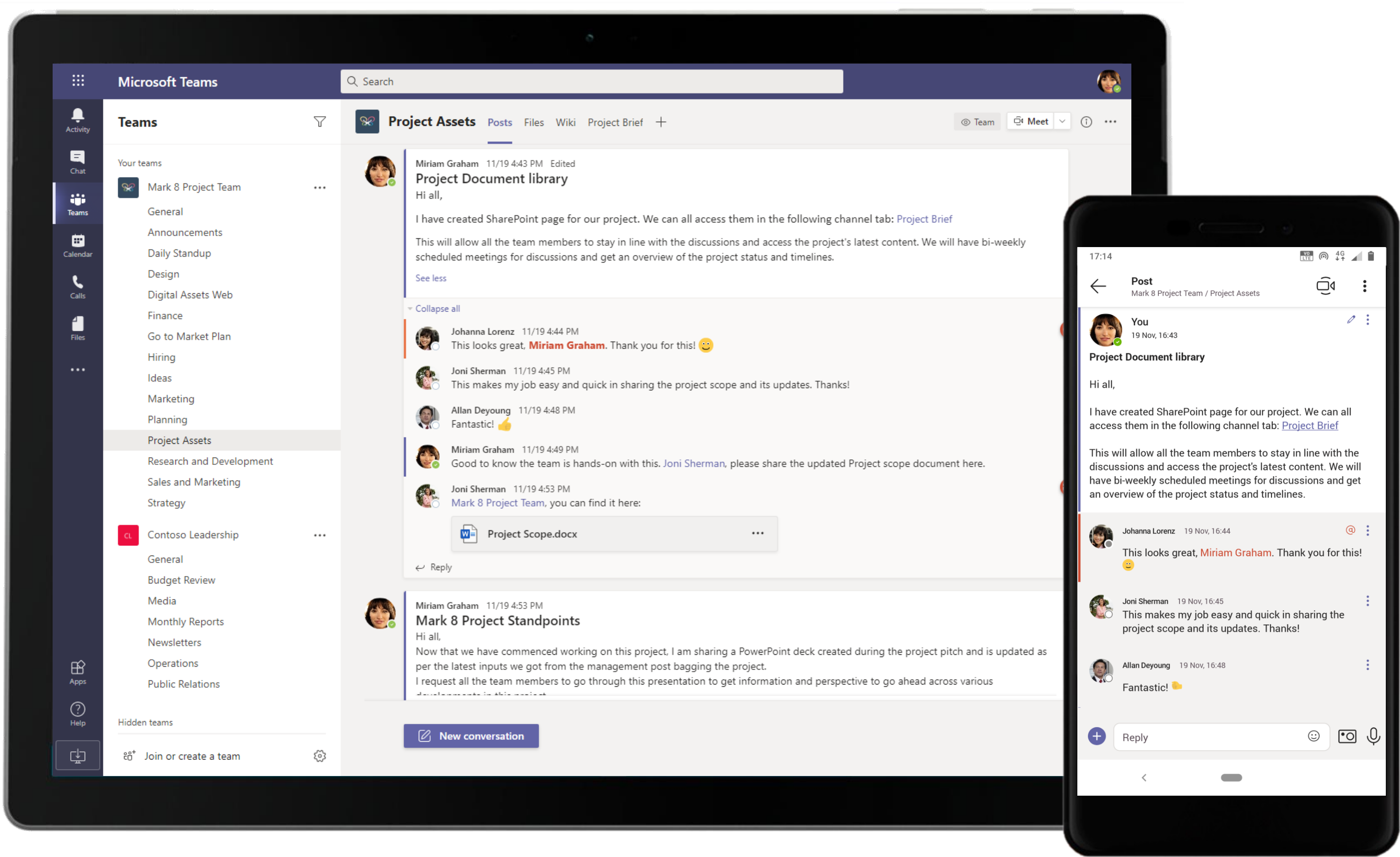
SharePoint



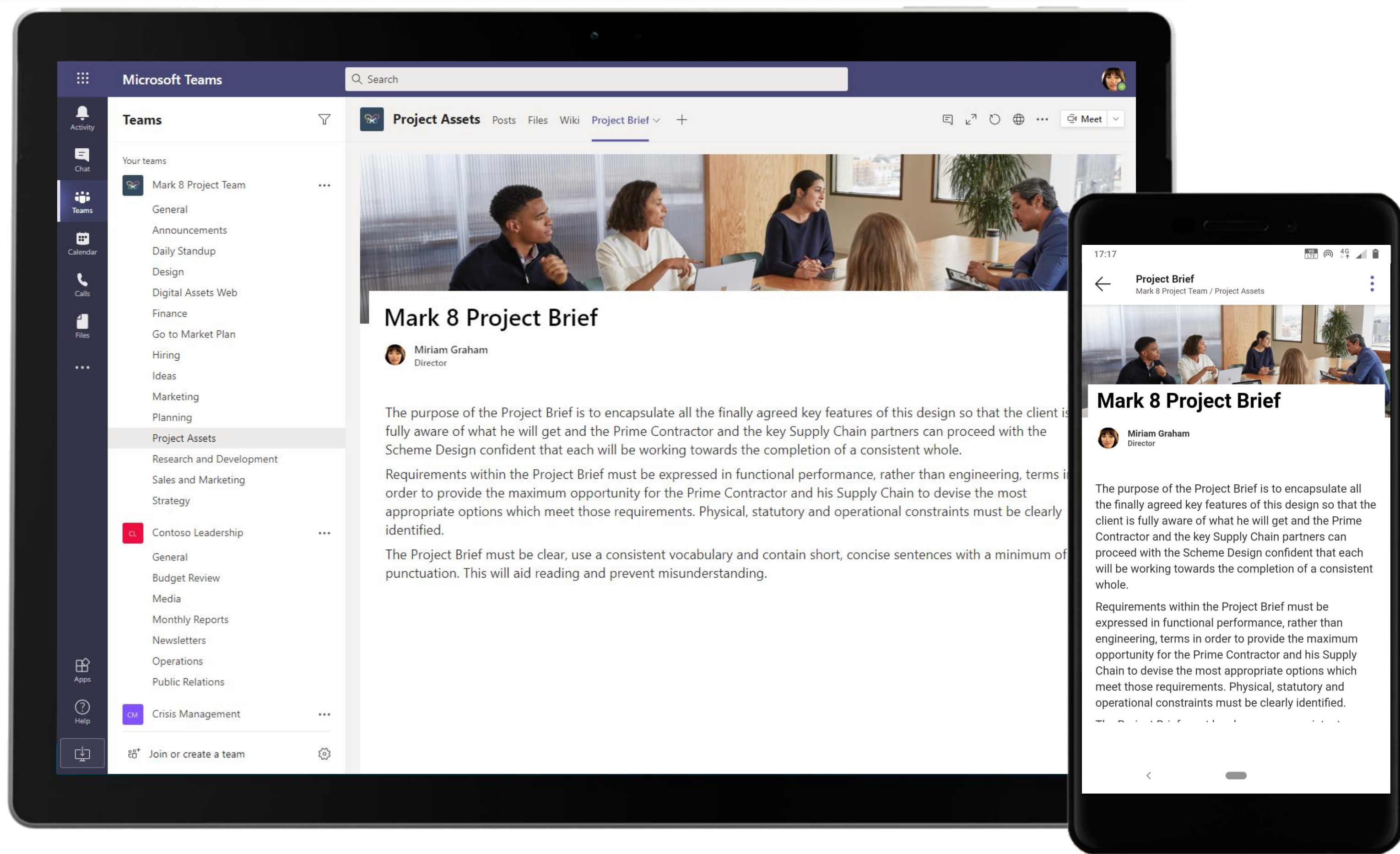
Word



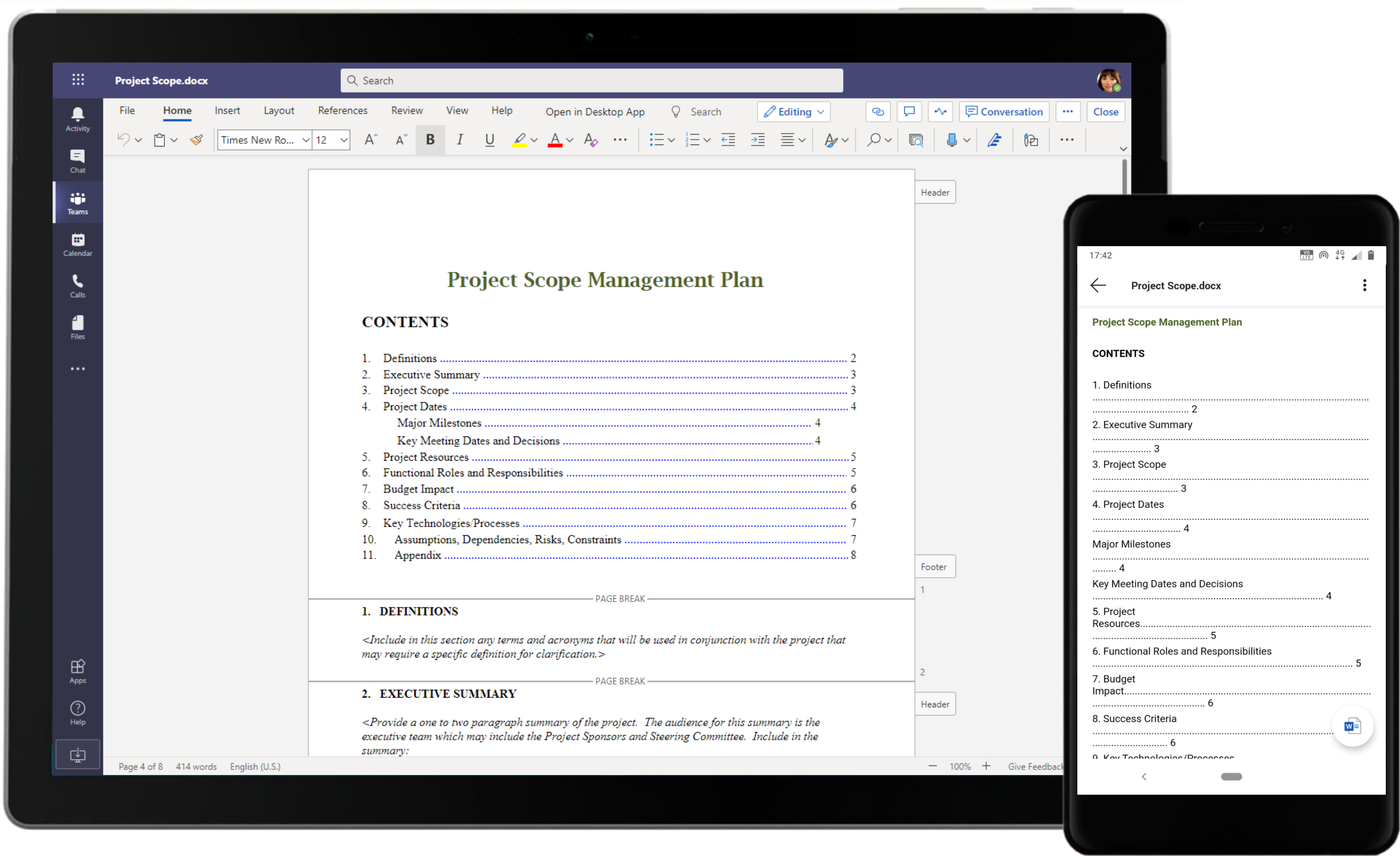
PDF



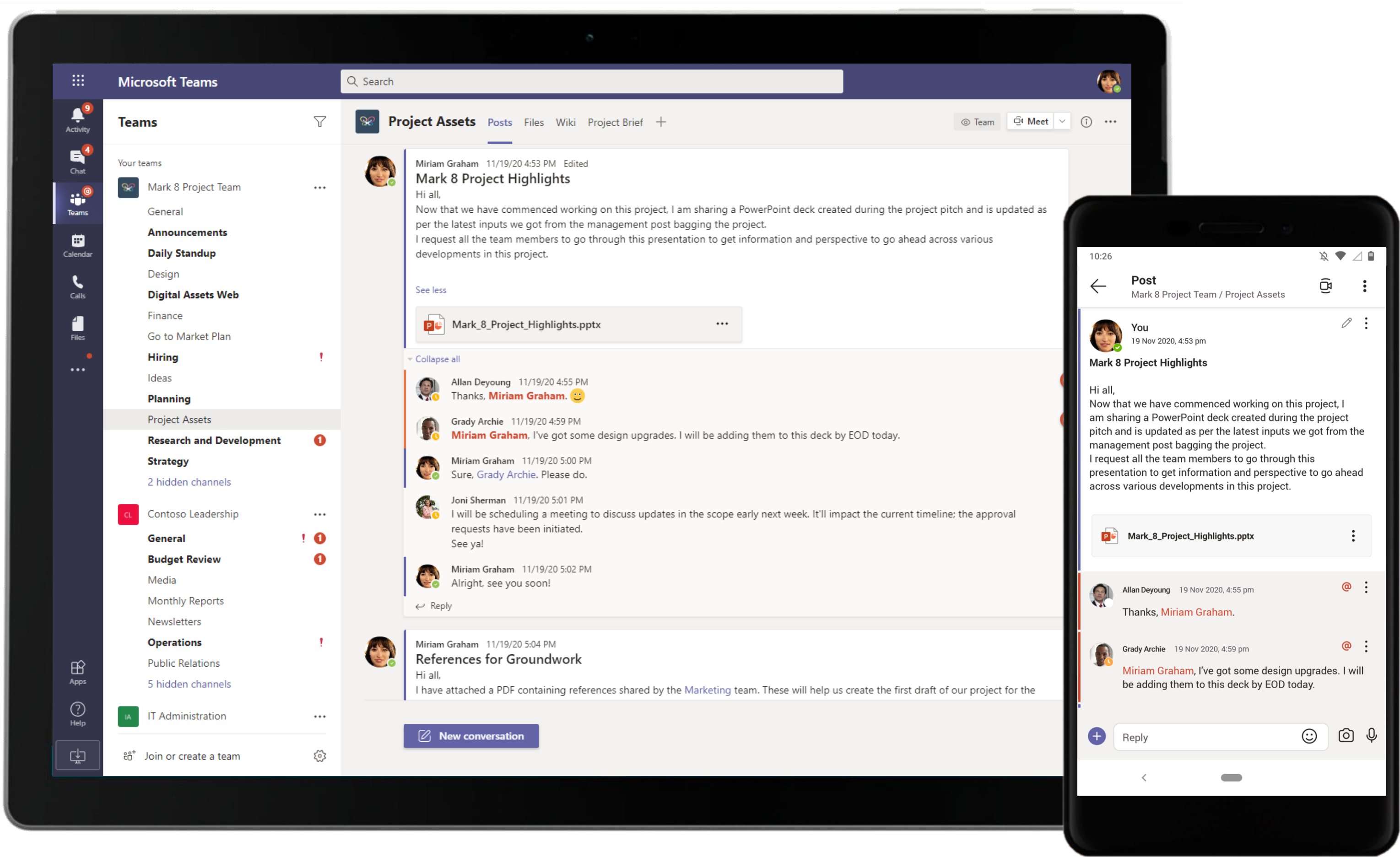
Microsoft Teams makes it easy to share files within channels. If the files are Word, Excel, or PowerPoint files, your colleagues can even view, edit and collaborate on the files right within Teams, thanks to deeply integrated Office 365 services.



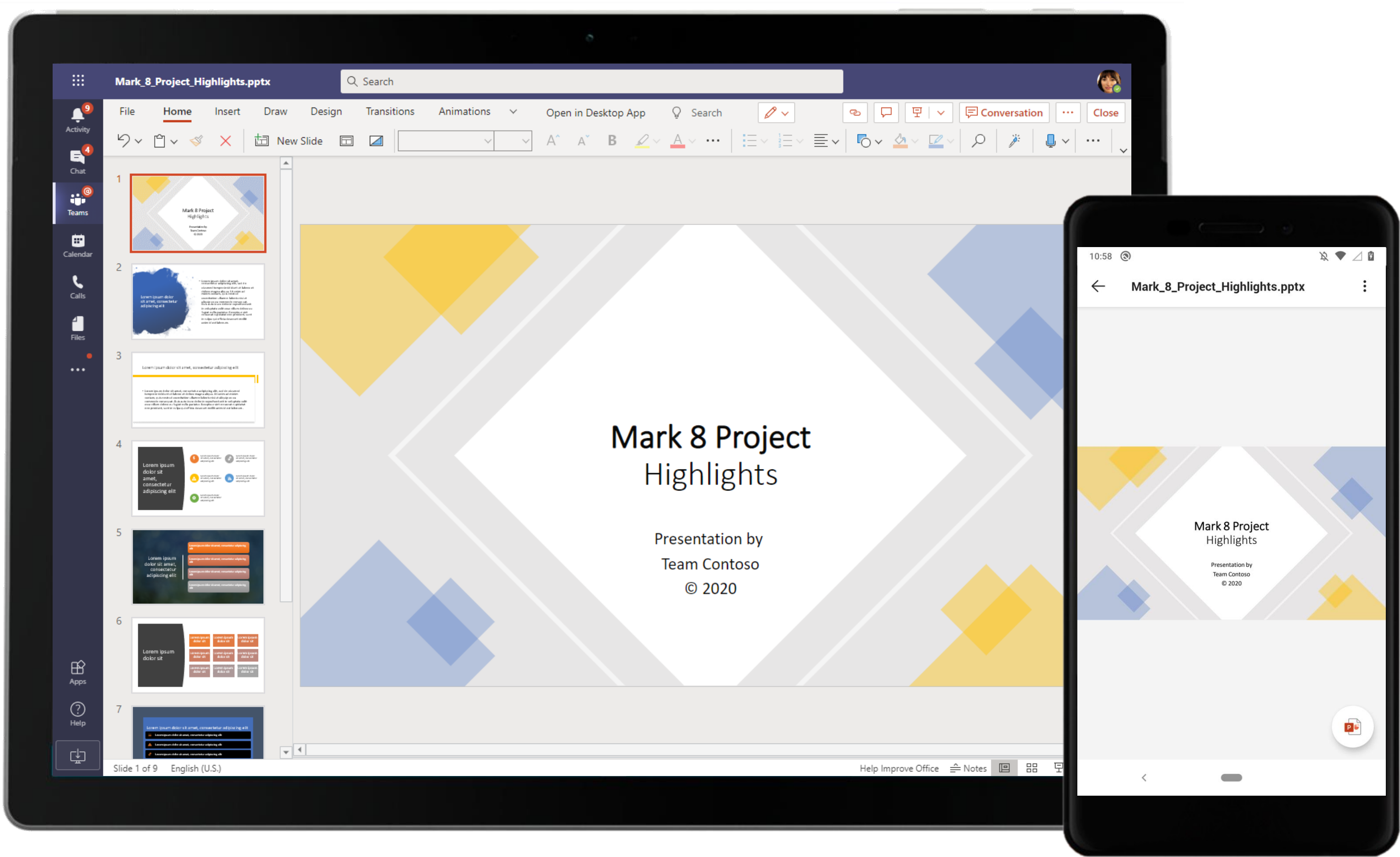
SharePoint empowers teamwork with dynamic and productive team sites for every project team, department, and division. Share files, data, news, and resources. Customize your site to streamline your team's work.



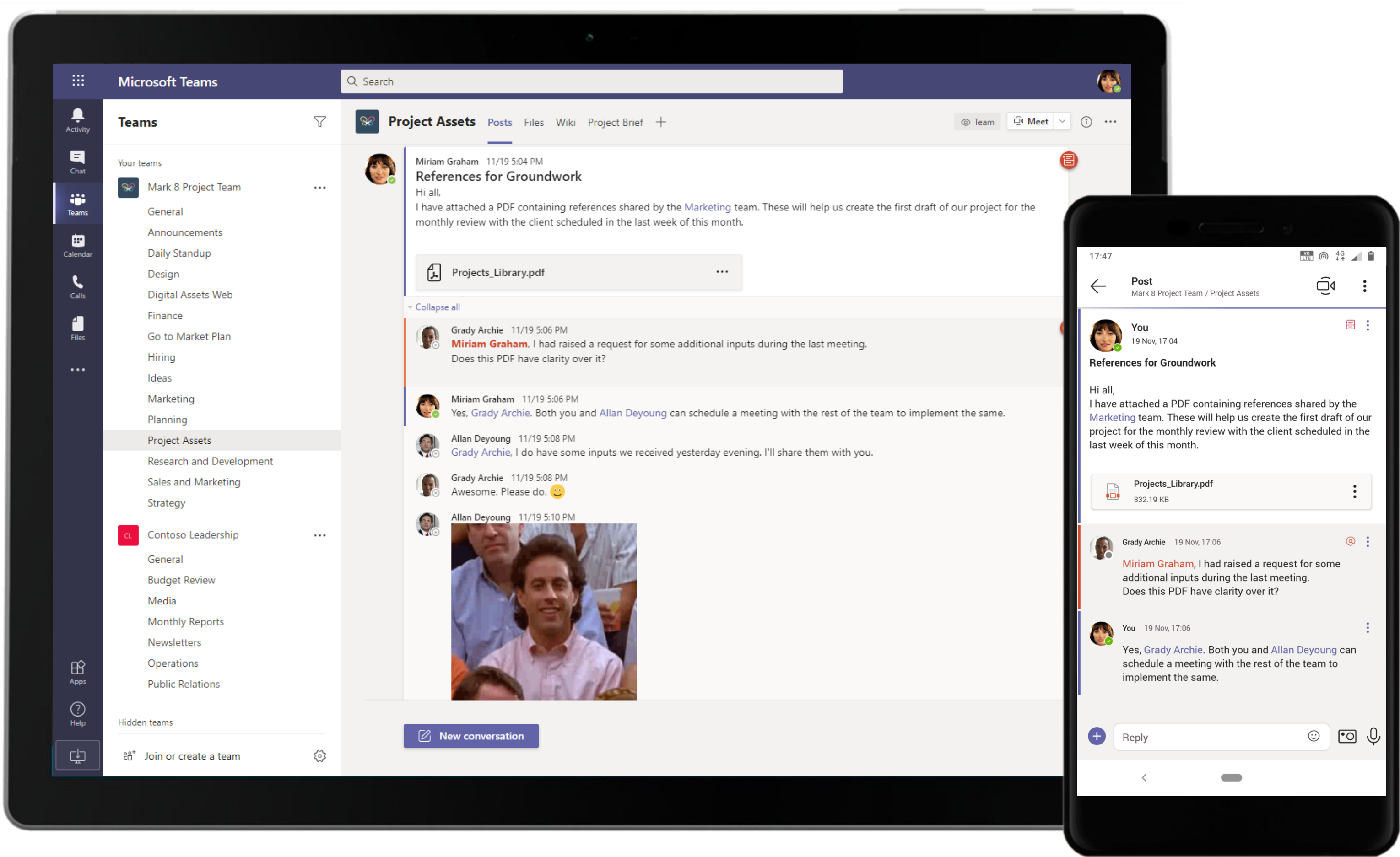
Enjoy powerful document creation and editing with the complete canvas and toolset of Word right inside Teams. Collaborate on team documents easily and store them in Files for each channel.



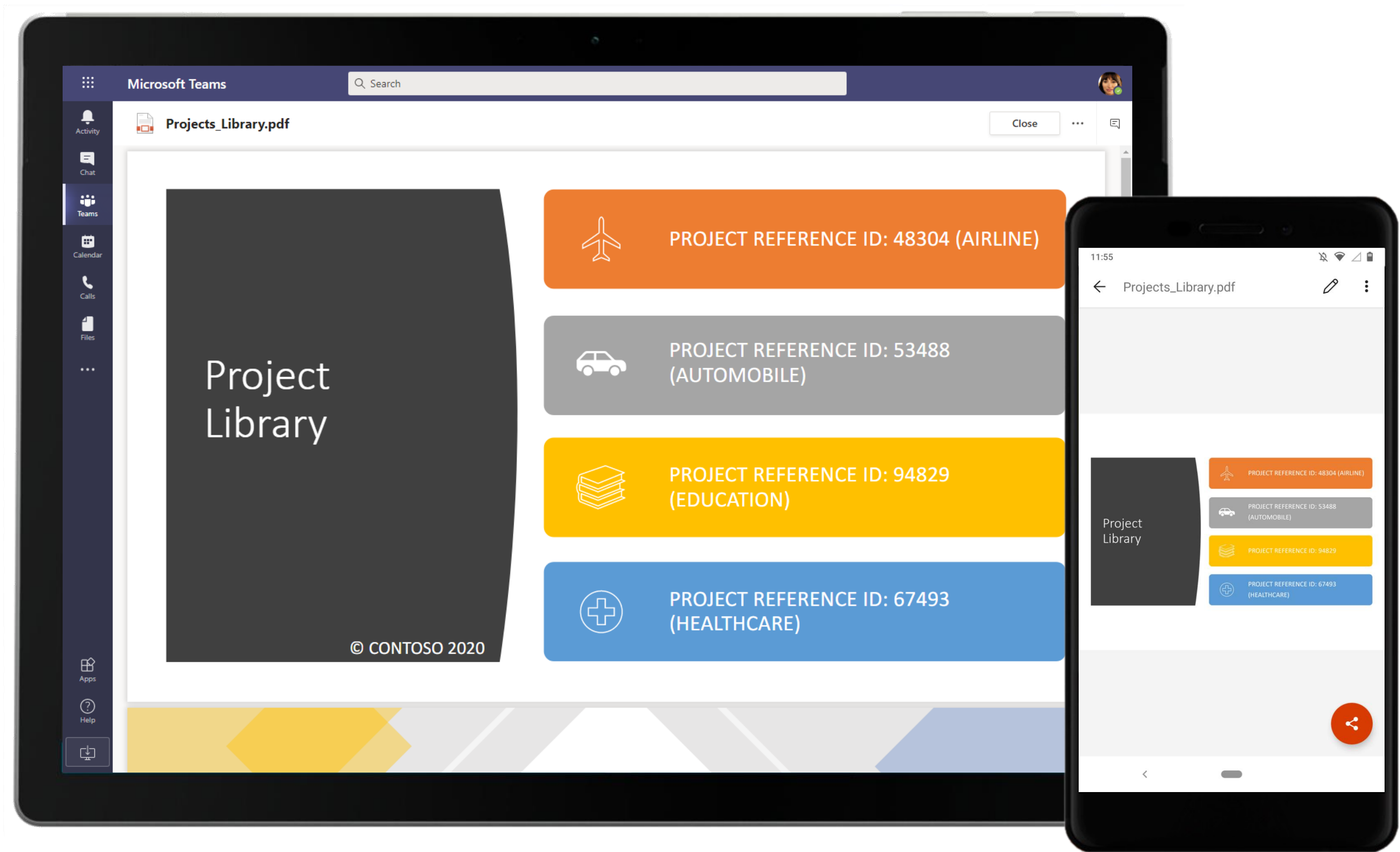
Collaborate with your team through channel communications using @mention to tag required personnel and keep conversations around the topic in a single thread. The team schedules meetings and shares files within the same thread too.



Create and share PowerPoint presentations over a Teams call to make meetings meaningful and to offer attendees a visual representation of key points covered.



Microsoft Teams conversations are threaded so users can reply directly in-context to specific conversations. Intense in moments of work flurry, these channels also see a fair amount of levity with GIFs and emojis that makes working together fun!



Add any PDF with rich content within your team as a tab of a file so everyone can get to it easily. Here the Sr Project Manager shares a PDF of the Project Library within the channel.



Manage Multiple Meetings with Ease

Sr. Project Manager

Scenario Walkthrough

The Sr. Project Manager is participating in a client meeting that is taking longer than expected. She notifies her team that she would not attend the scheduled brainstorming, and she asks the team to go ahead with the meeting while recording it and creating notes for easy reference. Following the client's meeting, the Sr. Project Manager replays the recording of the brainstorm, goes through the meeting notes and updates the action plan to ensure that the team seamlessly moves forward towards the target.

- Communicating with a partner outside the organization via a Teams call.
- Responds to a channel thread to update the team that she may not be able to attend the brainstorming meeting on time via channel conversations.
- Views the notes from the brainstorming session shared by other team members via OneNote.
- Listens to a recording of the brainstorming session that she missed staying abreast of the ideas discussed via Microsoft Stream.
- Creates and assigns action items for the team to work on based on the brainstorming session via Trello.

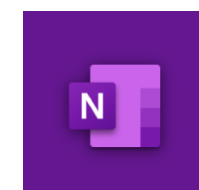
How did Microsoft Teams help the Sr. Project Manager to execute her roles and responsibilities?

- Record, share, and view meeting recordings and other rich video content with Microsoft Stream.
- Keep track of responses with alerts in the activity feed with @mentions and reply notifications.
- Collaborate and enable multiple people to work on the same document with OneNote.
- Create and assign tasks effectively for multiple projects with Trello.

Which app integrations on Teams made it possible?



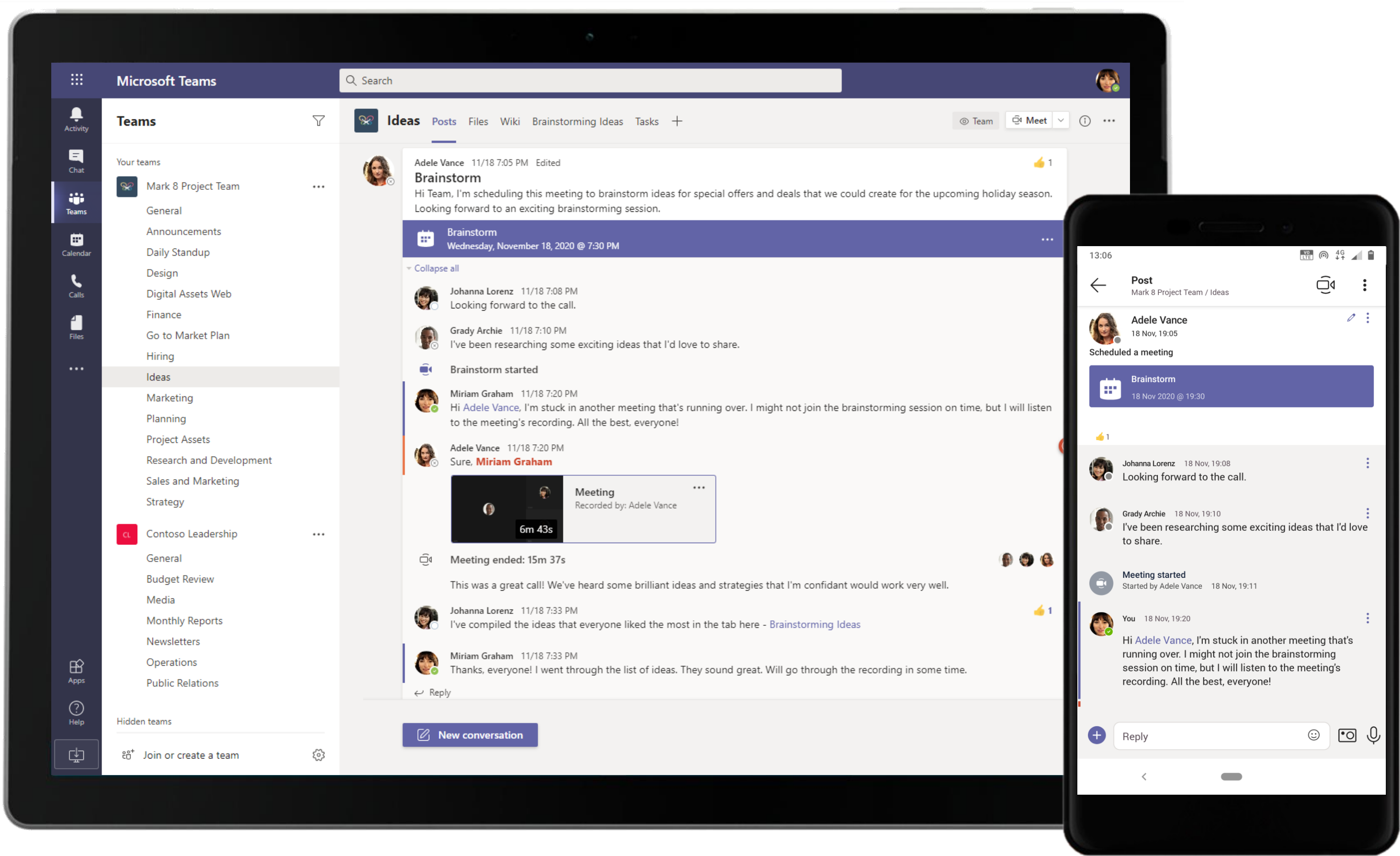
Trello



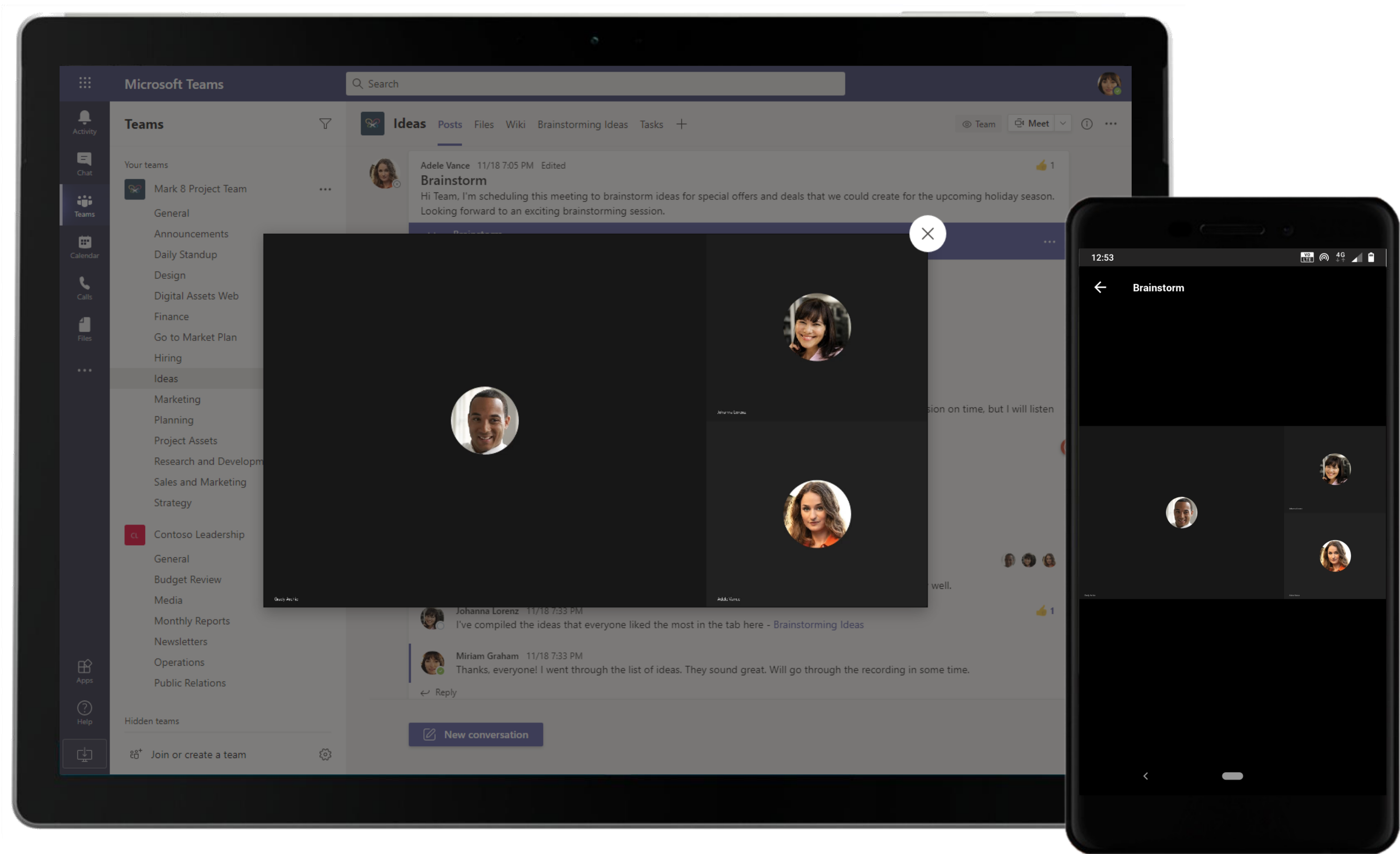
OneNote



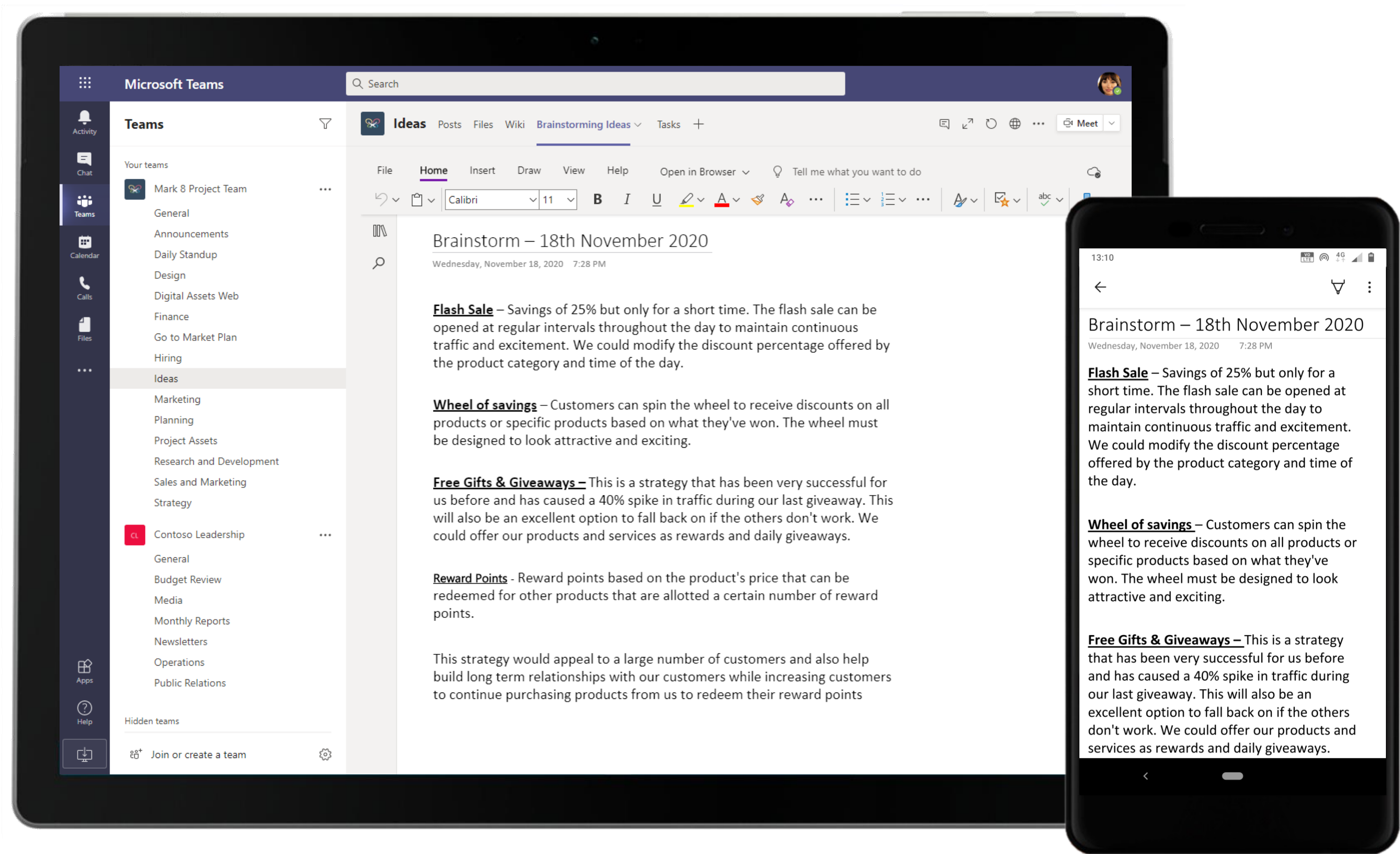
Microsoft
Stream



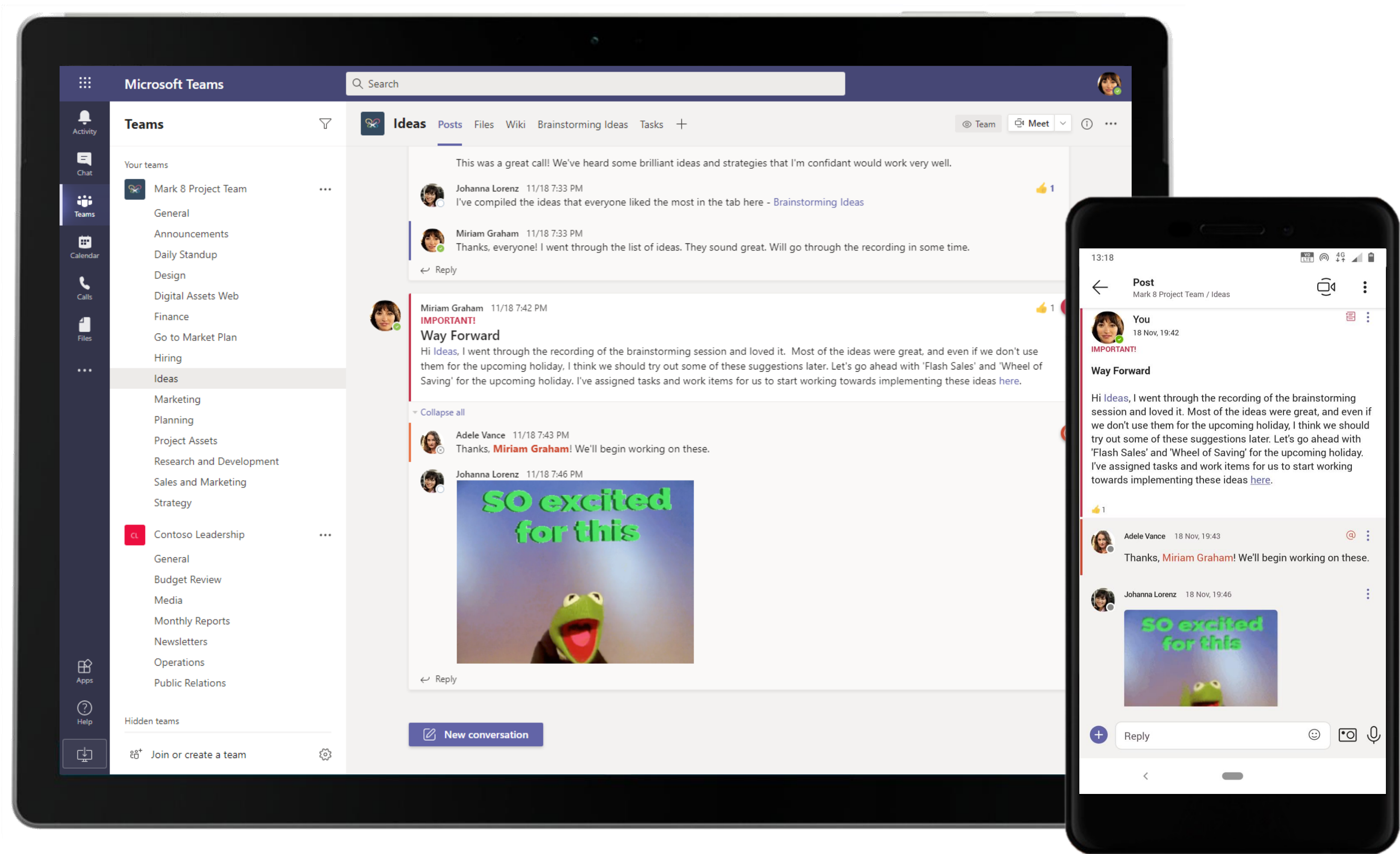
Microsoft Teams conversations are threaded so users can reply directly in-context to specific conversations, keeping relevant chats grouped together. @mention relevant team members to make sure you grab their attention in real-time. The Senior Project Manager lets the team to know she won't be able to attend the meeting.



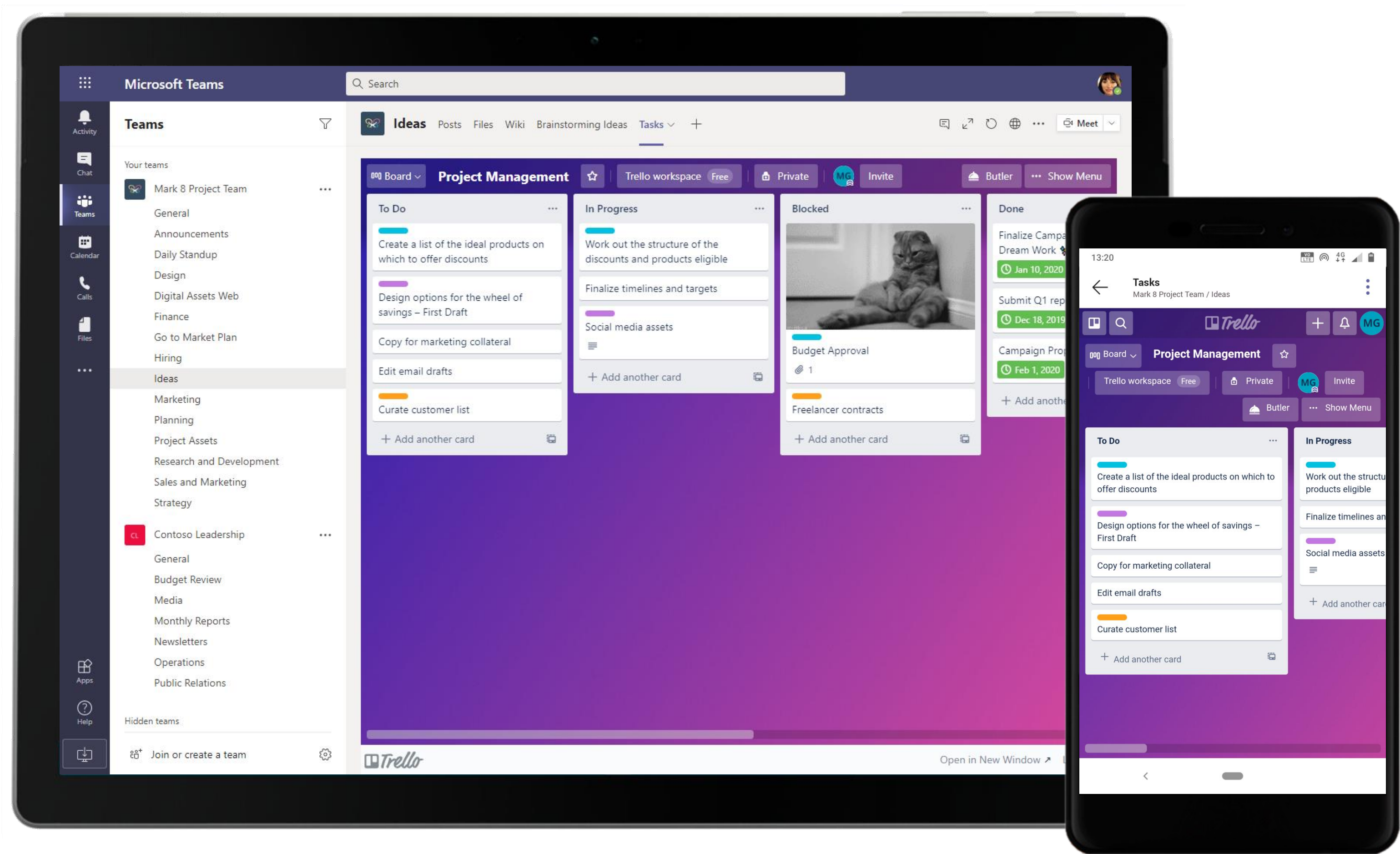
Watch videos from across your organization in the Stream application or in other applications you use every day—any time, on any device. The Senior Project Manager watches the meeting recording using Stream.



Add a OneNote tab to your channel in Microsoft Teams and use it as a shared space for notes among team members. The Sr project Manager views the meeting notes in the tab.



Channel conversations can contain a lot things – conversations, files shared by team members, meeting threads, and GIFs! Use social features like reacting to team members’ conversations and responses to acknowledge them.



Create and assign tasks effectively for multiple projects with Trello right inside Microsoft Teams. The Sr Project Manager creates and assigns action items for the team to work on based on the brainstorming session via Trello.



Ensure Efficient Daily Standups and Project Overview

Project Manager

Scenario Walkthrough

The Project Manager at Contoso gets a quick overview of the latest website statistics, which show longer load times. He then updates the team of his findings and participates in the daily standup while understanding his team's blockers to step in and coordinate to ensure that the team is on track to meet their sprint goals. Microsoft Teams and its varied list of apps help the team to collaborate coherently on one platform.

- Responds to the daily standup questions sent by the AgilePolly bot in chat.
- Views real-time website traffic and performance within a channel tab via Site24x7.
- Views the responses and blockers shared by the members of his team within the AgilePolly channel tab.
- Communicates with the team during the daily standup to highlight observations and quickly clear blockers via channel meetings.
- Reviews and discusses tasks that have been added via Project using screen share.
- Keeps track of the project on a timeline with Roadmap – Microsoft Project and sends further communication to the team.

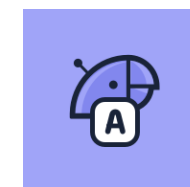
How did Teams help the Project Manager execute his roles and responsibilities?

- Automate team status meetings and scrum updates using the AgilePolly bot.
- Flexible uptime and performance monitoring from the cloud with Site24x7.
- Efficiently plan projects and assigns tasks to stay focused with Project.
- Create a consolidated timeline view to keep track of multiple projects with Roadmap – Microsoft Project.

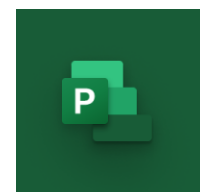
Which app integrations on Teams made it possible?



Site24x7



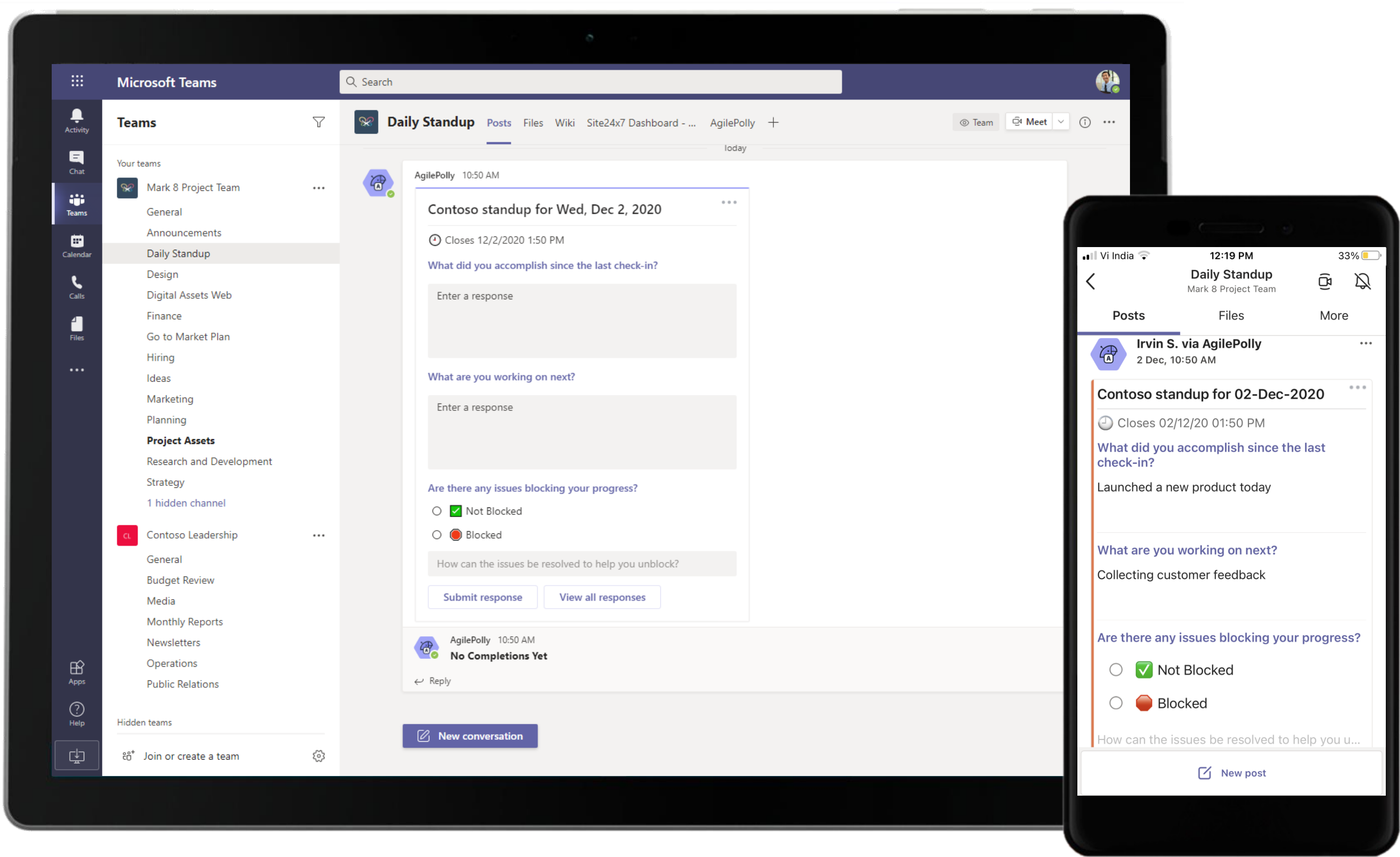
AgilePolly



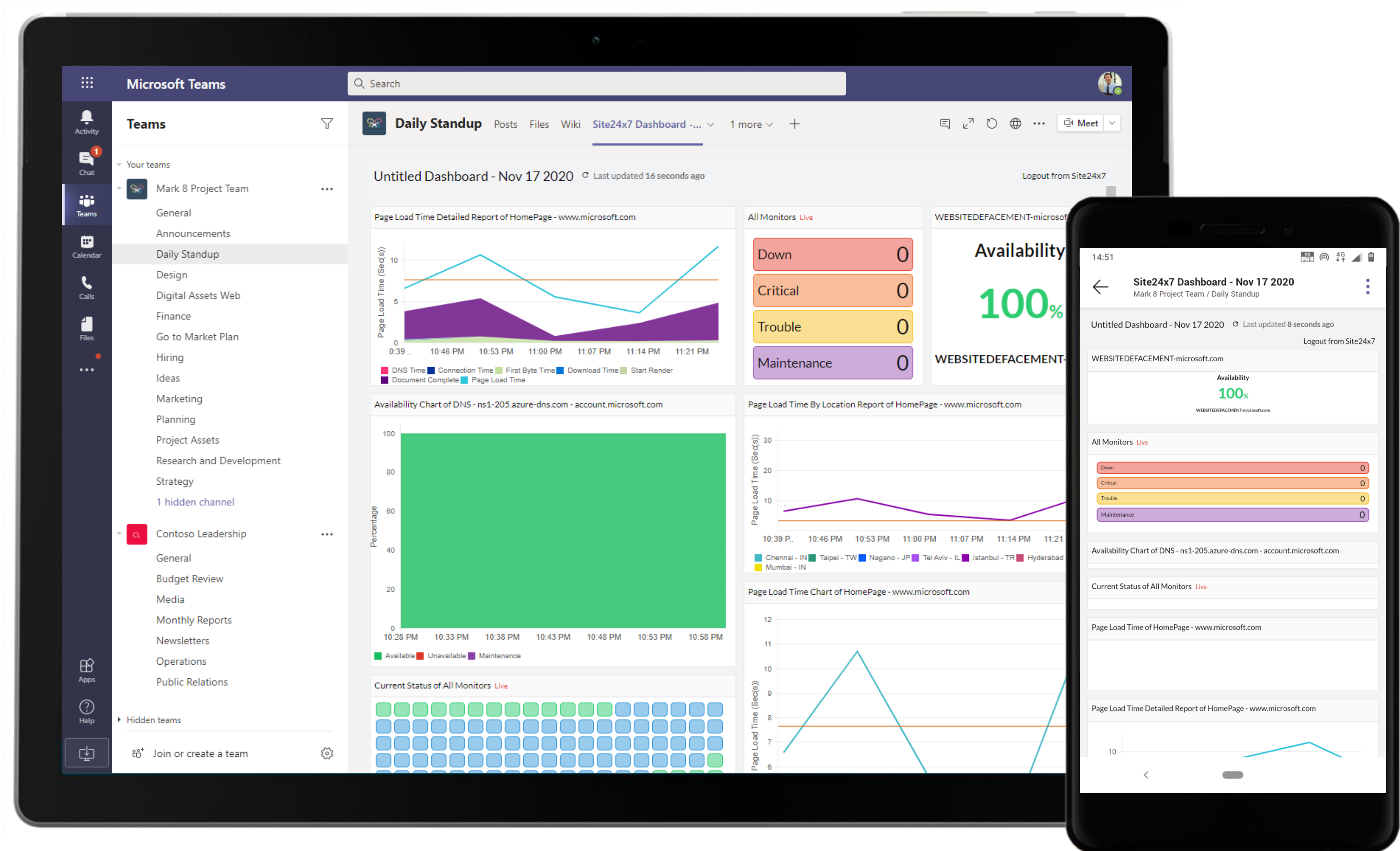
Project



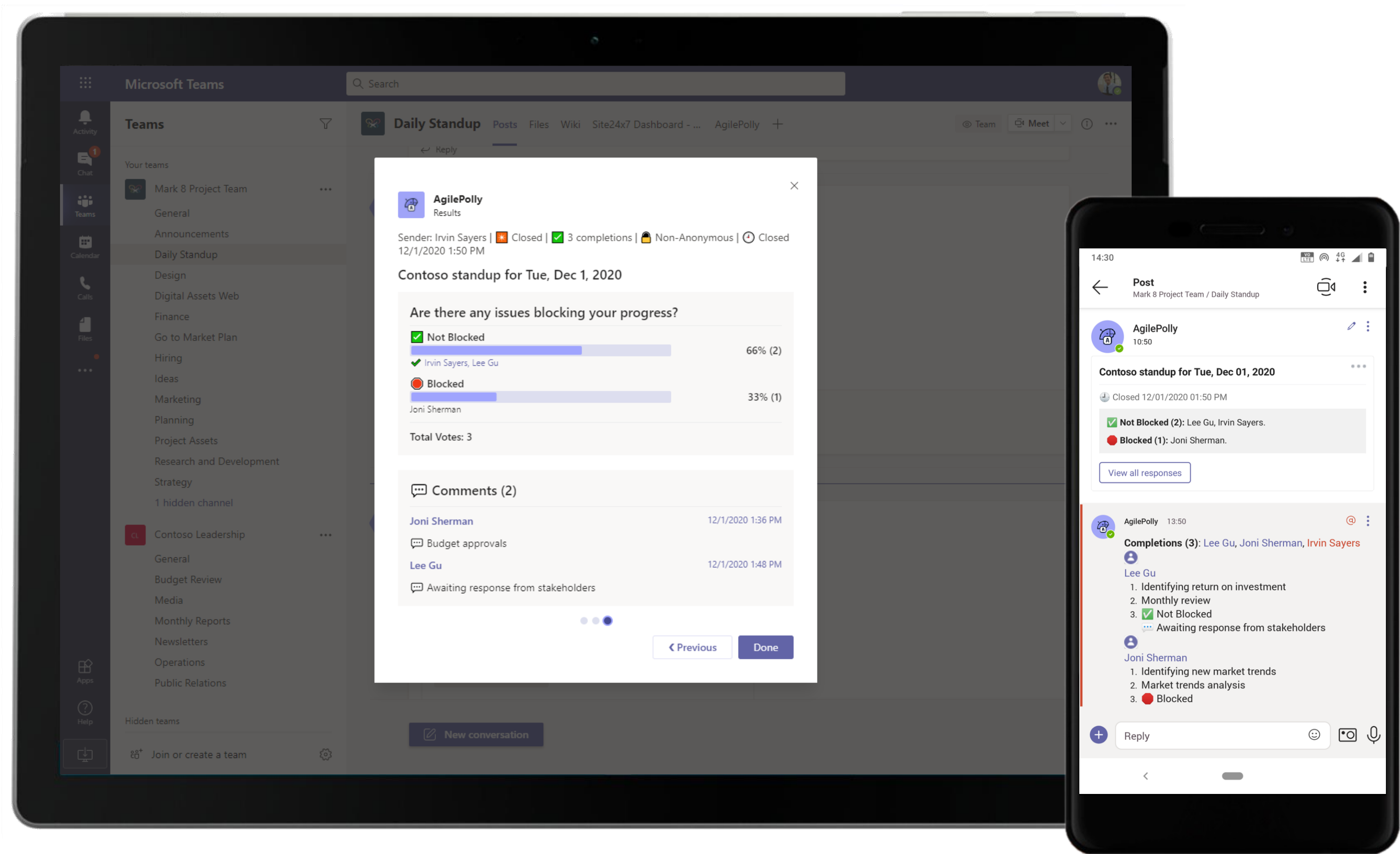
Roadmap –
Microsoft
Project



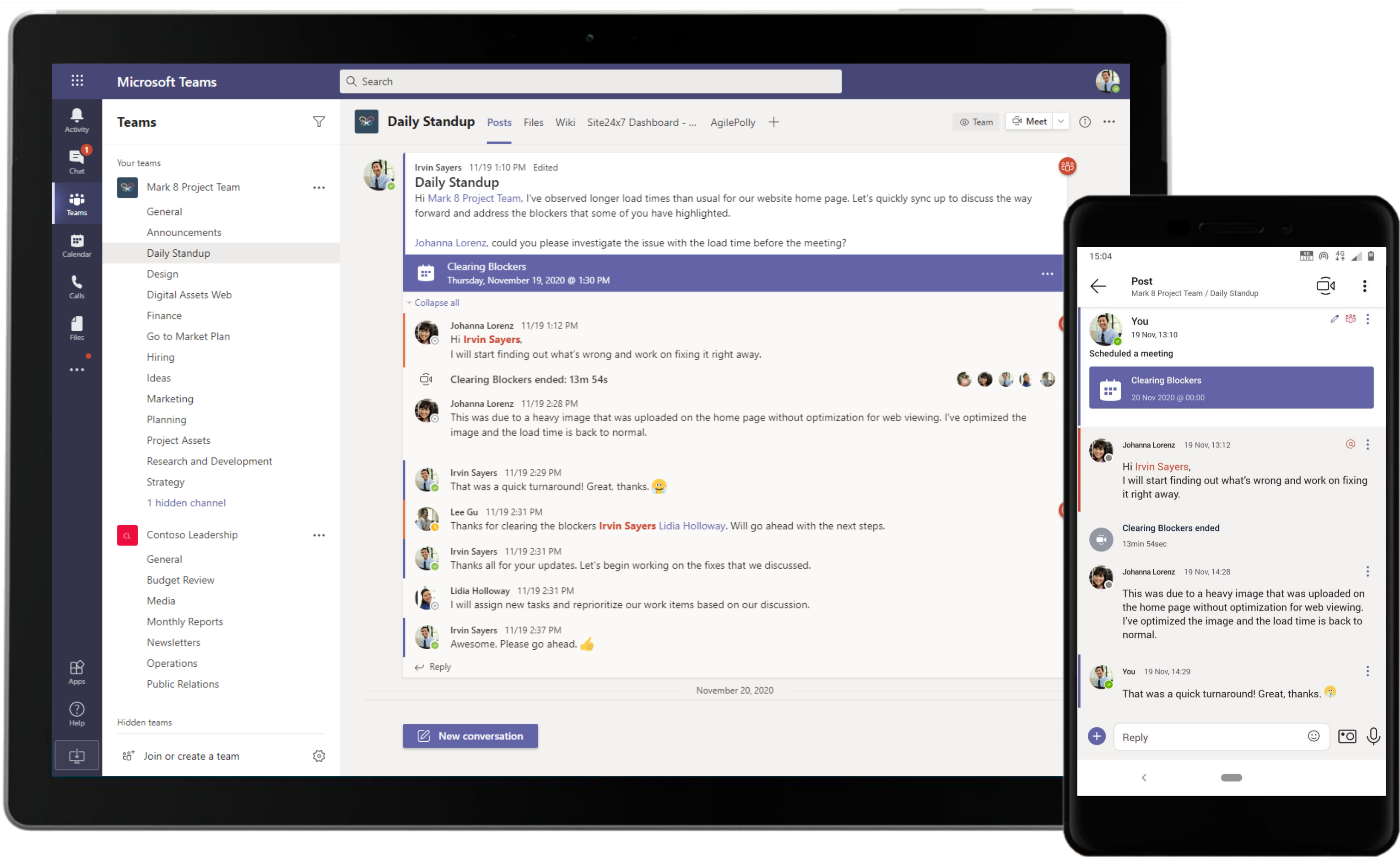
Automate standups and check-ins while enabling your teams to be more effective and engaged by tracking status updates and detecting team blockers with AgilePolly in Microsoft Teams. The Project Manager responds to the daily standup questions sent by the AgilePolly bot in chat.



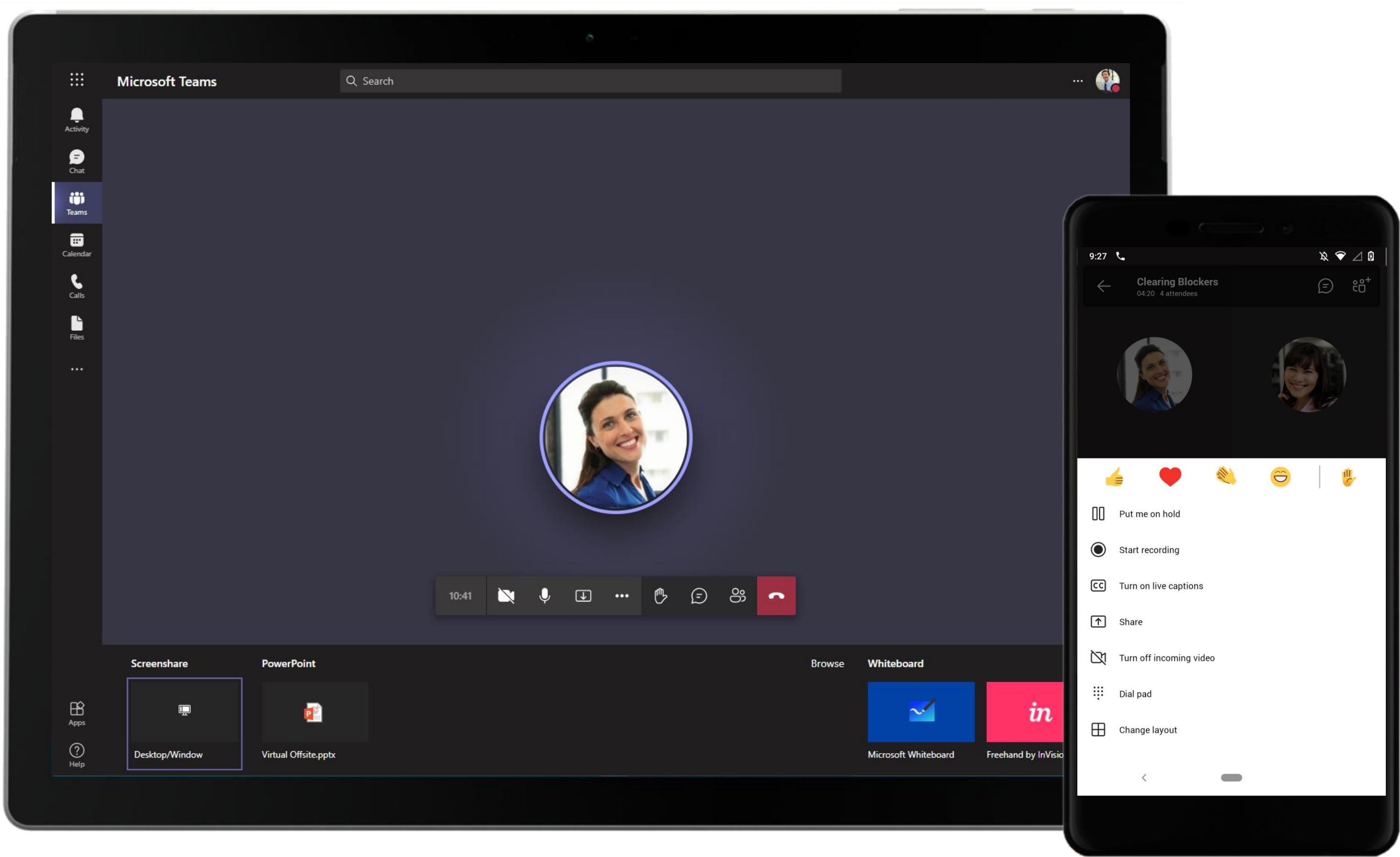
Enable your agile workforce to organize, collaborate, and prioritize alert remediation actions by embedding custom dashboards into your Microsoft Teams tabs. The Project Manager views real-time website traffic and performance within a channel tab via Site24x7.



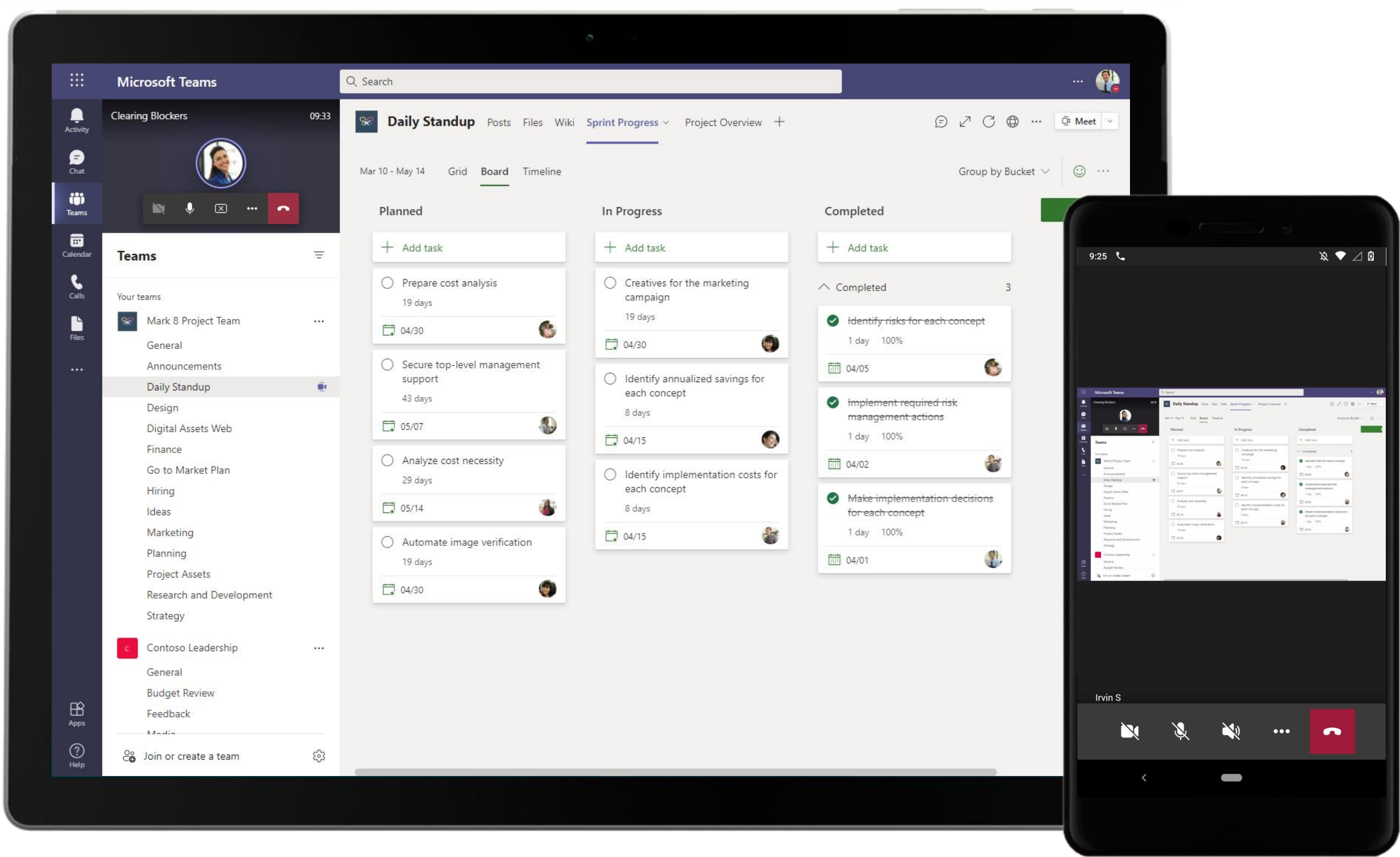
Use AgilePolly to author, deliver, automate and run asynchronous daily status meetings, weekly retrospectives, and one-on-one check-ins while staying up-to-date with real-time progress without leaving Microsoft Teams.



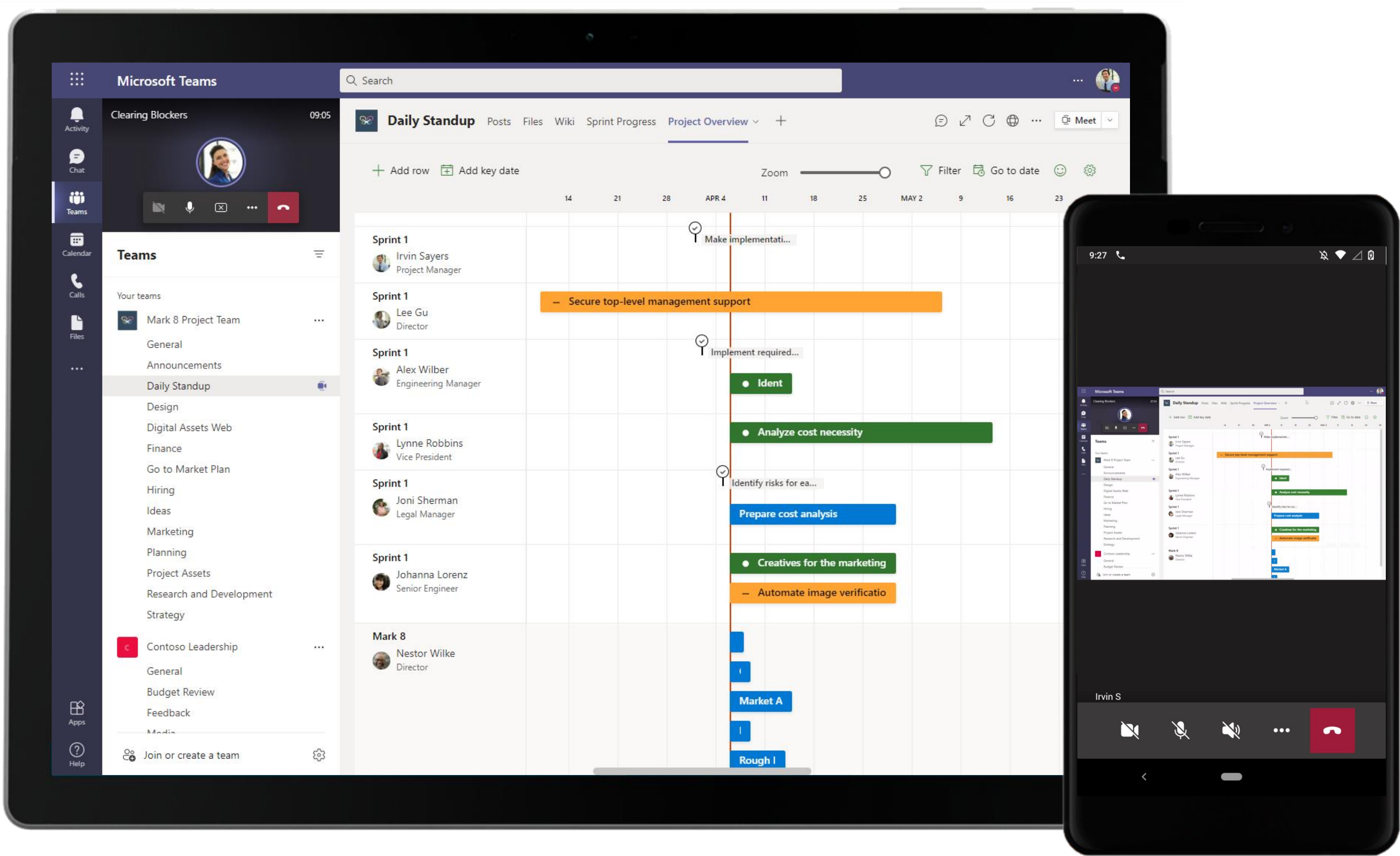
Collaborate with your team through channel communications using @mention to tag required personnel and keep conversations around the topic in a single thread. The team schedules meetings and shares files within the same thread too.



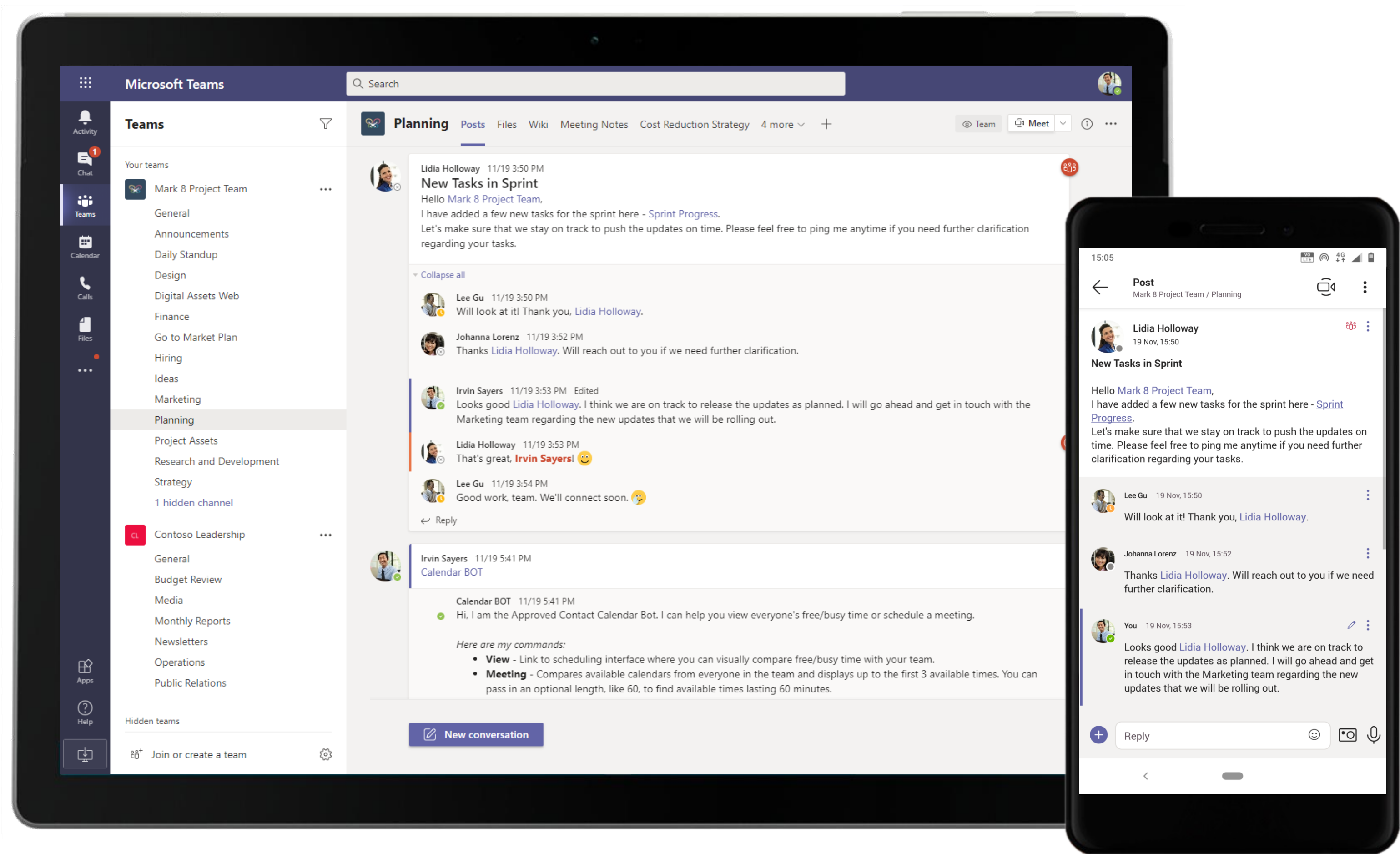
Meeting attendees can leverage a wide range of features like live captions, screenshare, whiteboard and more to make meetings better and more engaging in Teams.



Tackle anything from small projects to large initiatives with Project in teams. Track a project to completion on grid, timeline, and board views using tasks with dependencies, assignments, and more.



Plan large initiatives and manage your portfolio by creating a consolidated timeline view of multiple projects from Project and Azure Boards with Roadmap – Microsoft Project in Teams. The Project Manager discusses project timelines during the daily standup.



Microsoft Teams conversations are threaded so users can reply directly in-context to specific conversations. Intense in moments of work flurry, these channels also see a fair amount of levity with GIFs and emojis that makes working together fun!



Create Agendas and Record Meeting Decisions

Project Manager

Scenario Walkthrough

The Project Manager wants to ensure that meetings are productive and that everyone comes well prepared. He shares the agenda for the weekly sync and then receives a suggestion for a new agenda item to capitalize on the buzz surrounding a new feature that was recently rolled out. The Project Manager records all decisions and then reaches out to the Marketing team to quickly discuss the decisions taken and the way forward.

- Schedules a meeting and configures a Decisions meeting tab to share and collaborate over the meeting agenda
- Reviews and approves a new agenda suggestion to ensure that the team moves swiftly to capitalize on a successful feature rollout.
- Discusses the meeting agenda and records key meeting outcomes via Decisions.
- Reaches out to the Marketing team to inform them of the plan to redirect advertising expenditure for the week.
- Gets on a call with the marketing team to brainstorm on ideas and strategize the best way forward via channel meetings.
- Views tasks assigned to get a quick overview of the way forward via monday.com.

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

- Stay abreast of the tasks assigned across teams and filter by priority with monday.com.
- Create, add and share agendas and decisions within a meeting with Decisions.
- Live captions with speaker attribution helps multiple meeting attendees to seamlessly stay on the same page

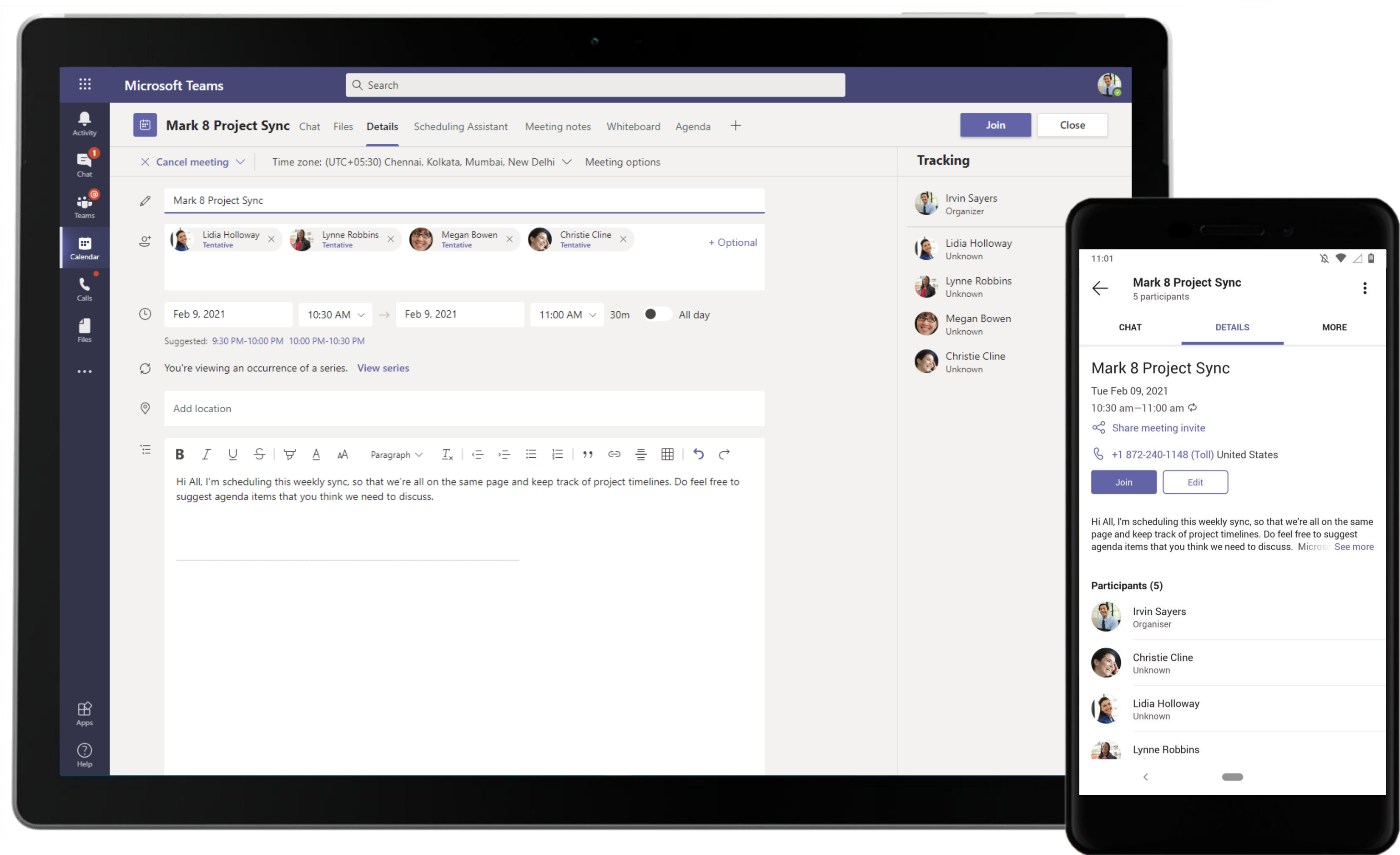
Which app integrations on Teams made it possible?



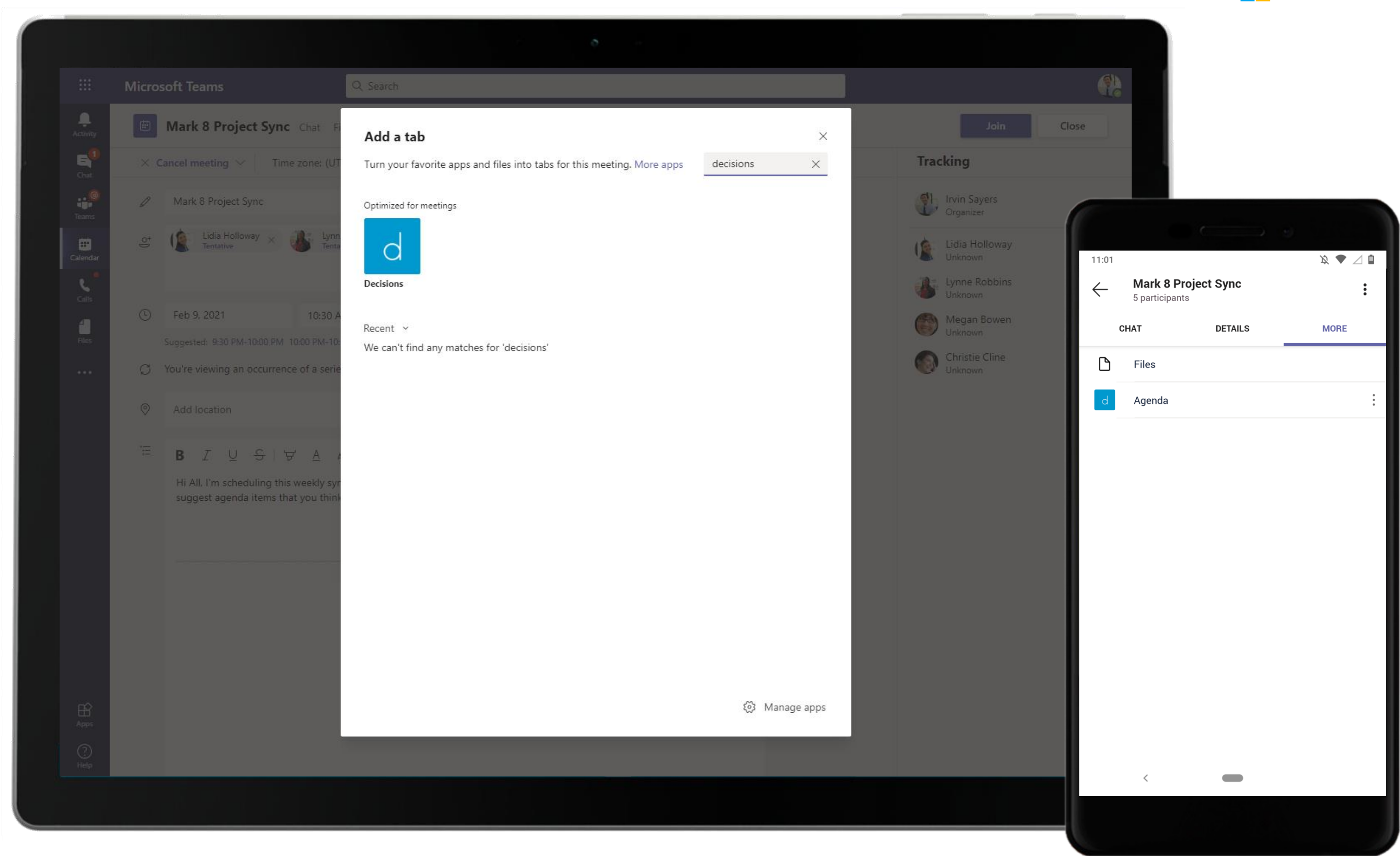
Decisions



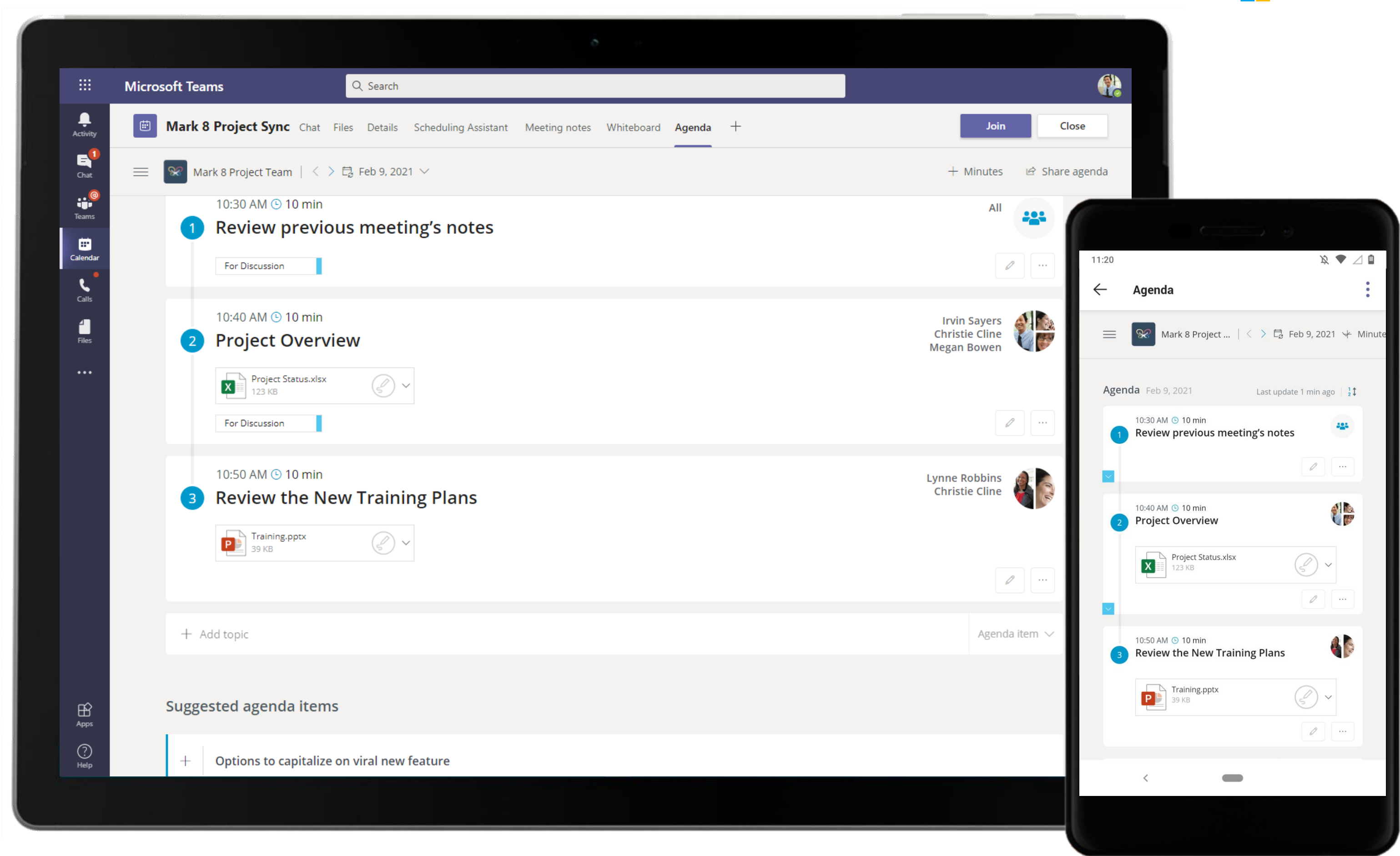
monday.com



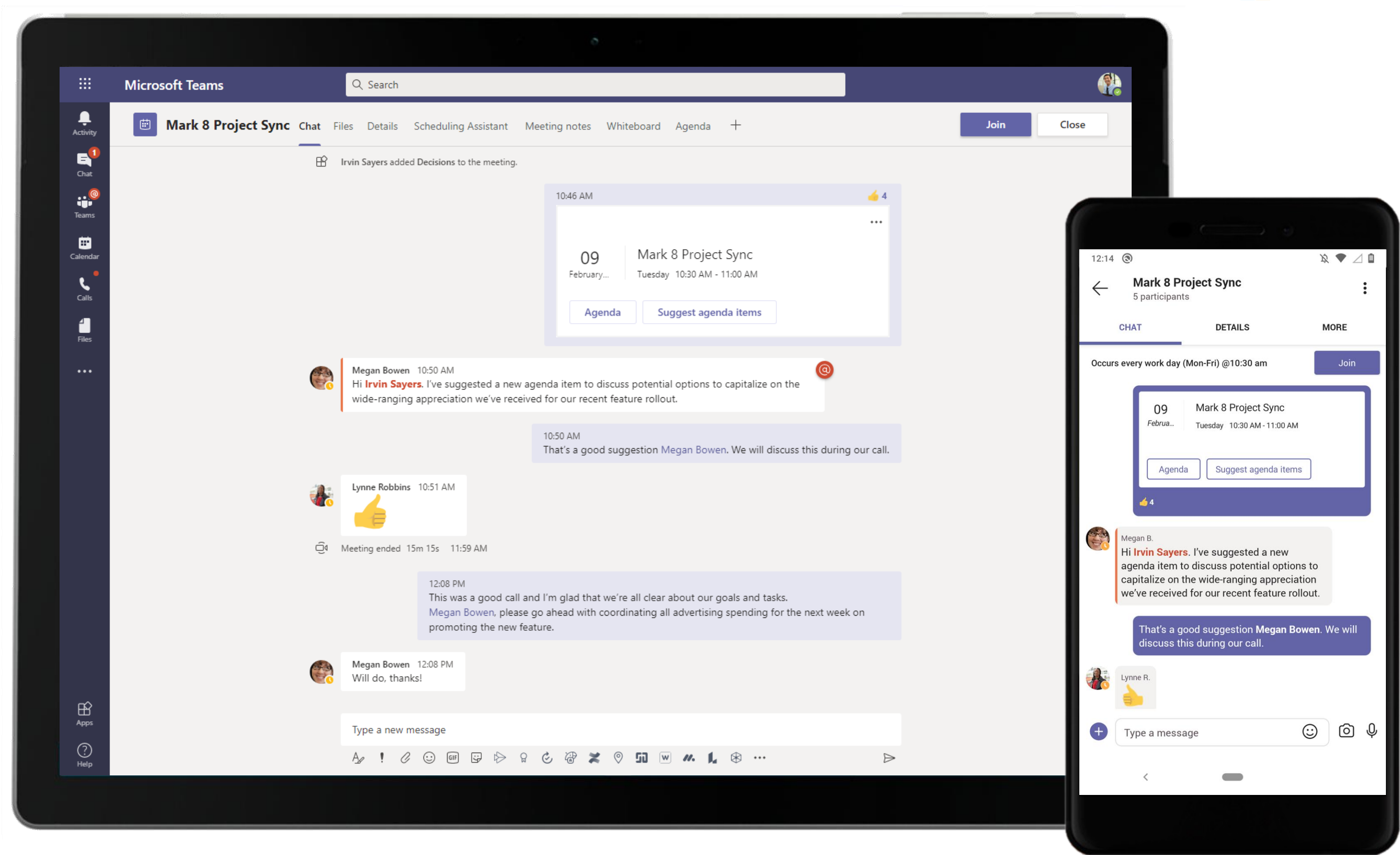
Complete meeting solutions in Teams support screen sharing, recording, video and audio conferencing. Scheduling Assistant feature suggests times that are optimal for all attendees.



Add your favorite apps as a meeting tab to enable participants to seamlessly interact with the app during the call. The Project Manager configures a tab for Decisions.



With Decisions for Microsoft Teams you can create and share agendas, collaborate on agenda topics, attach supporting documents and more. The Project Manager creates the meeting agenda and approves a suggested agenda item.



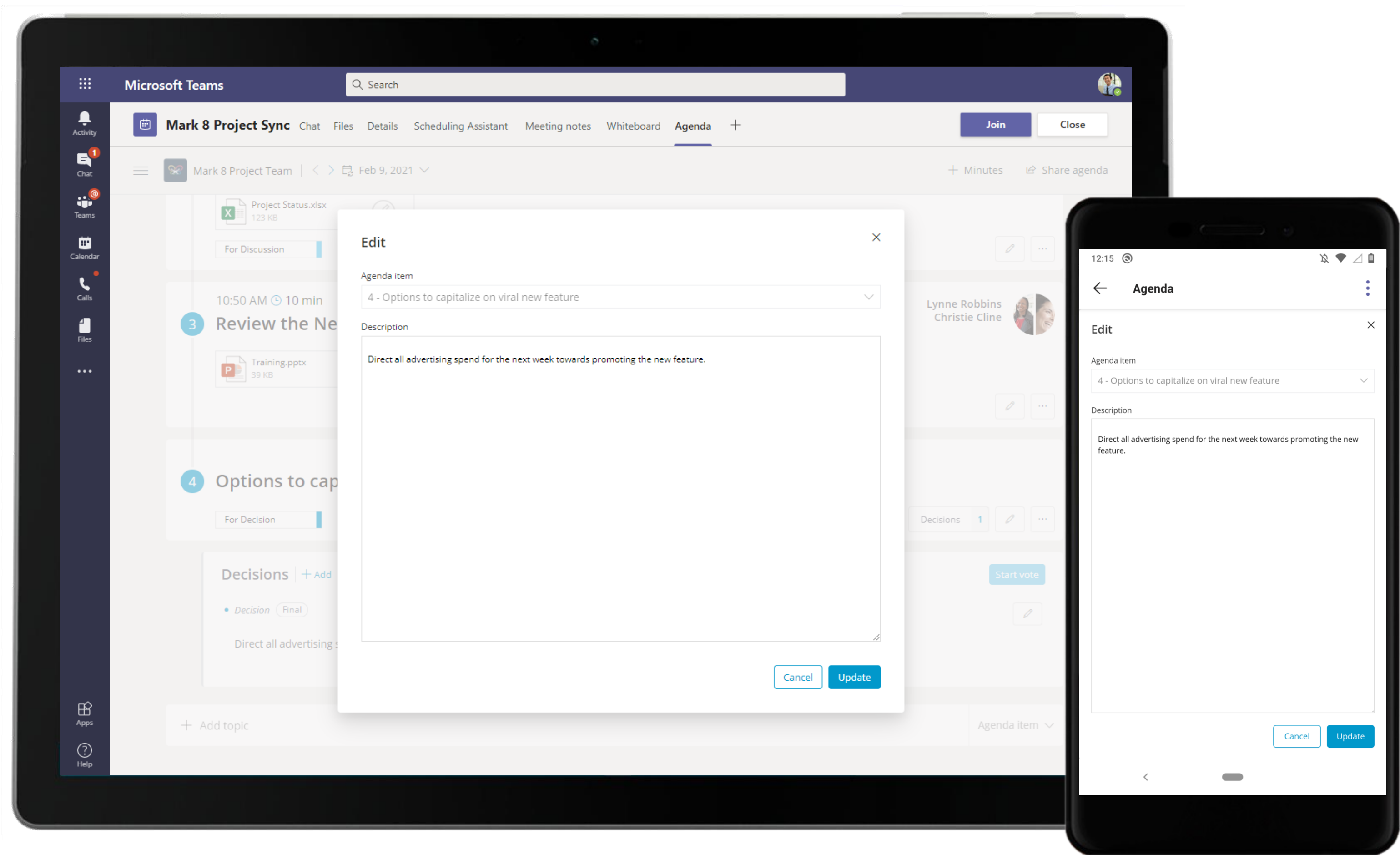
Use the Decisions app to share the meeting agenda with participants before a meeting begins to ensure that everyone is on the same page. The Project Manager shares the meeting agenda before the call.



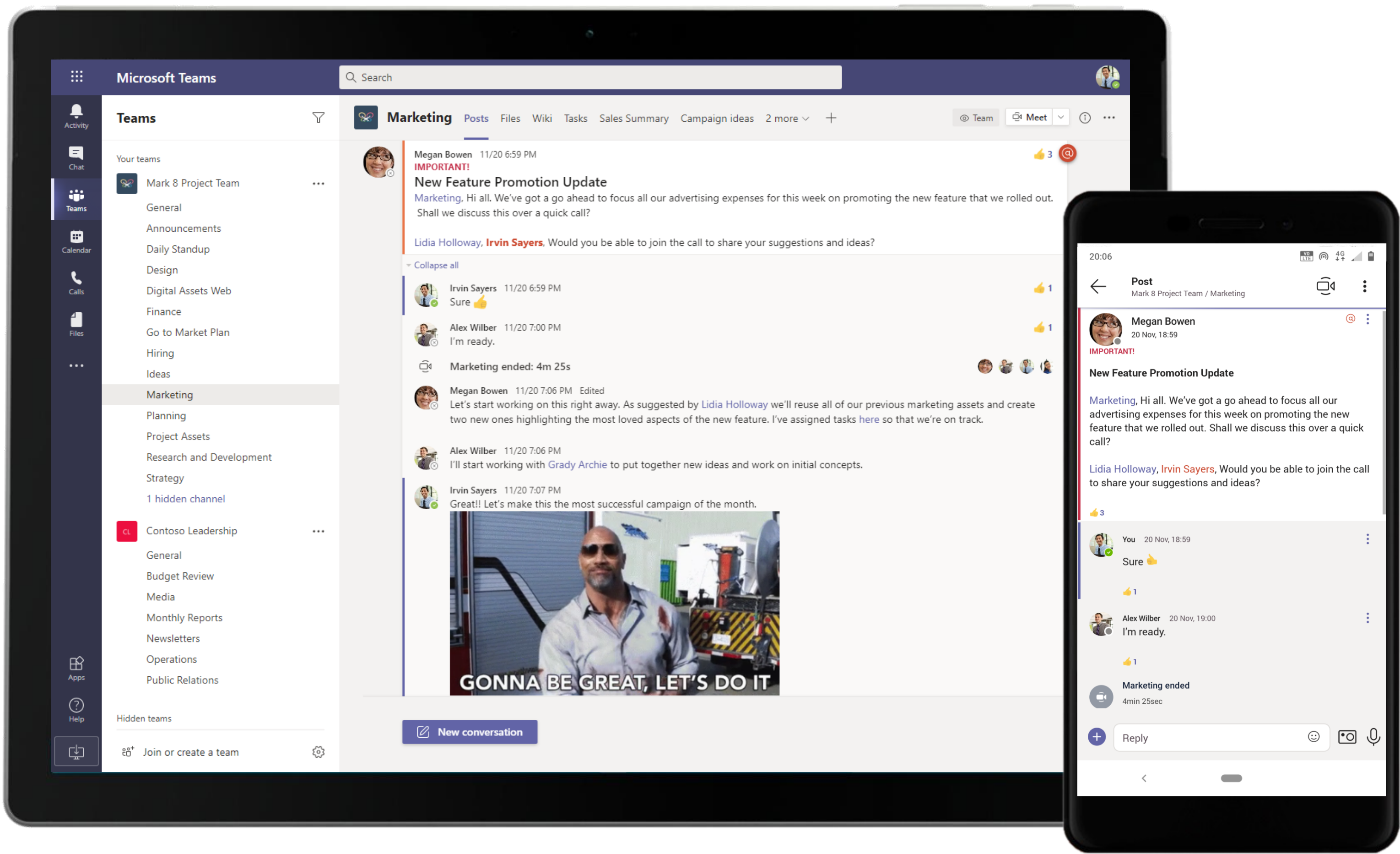
Meeting attendees can leverage a wide range of features like live captions, meeting breakouts, together mode and more to make meetings better and more engaging in Teams.



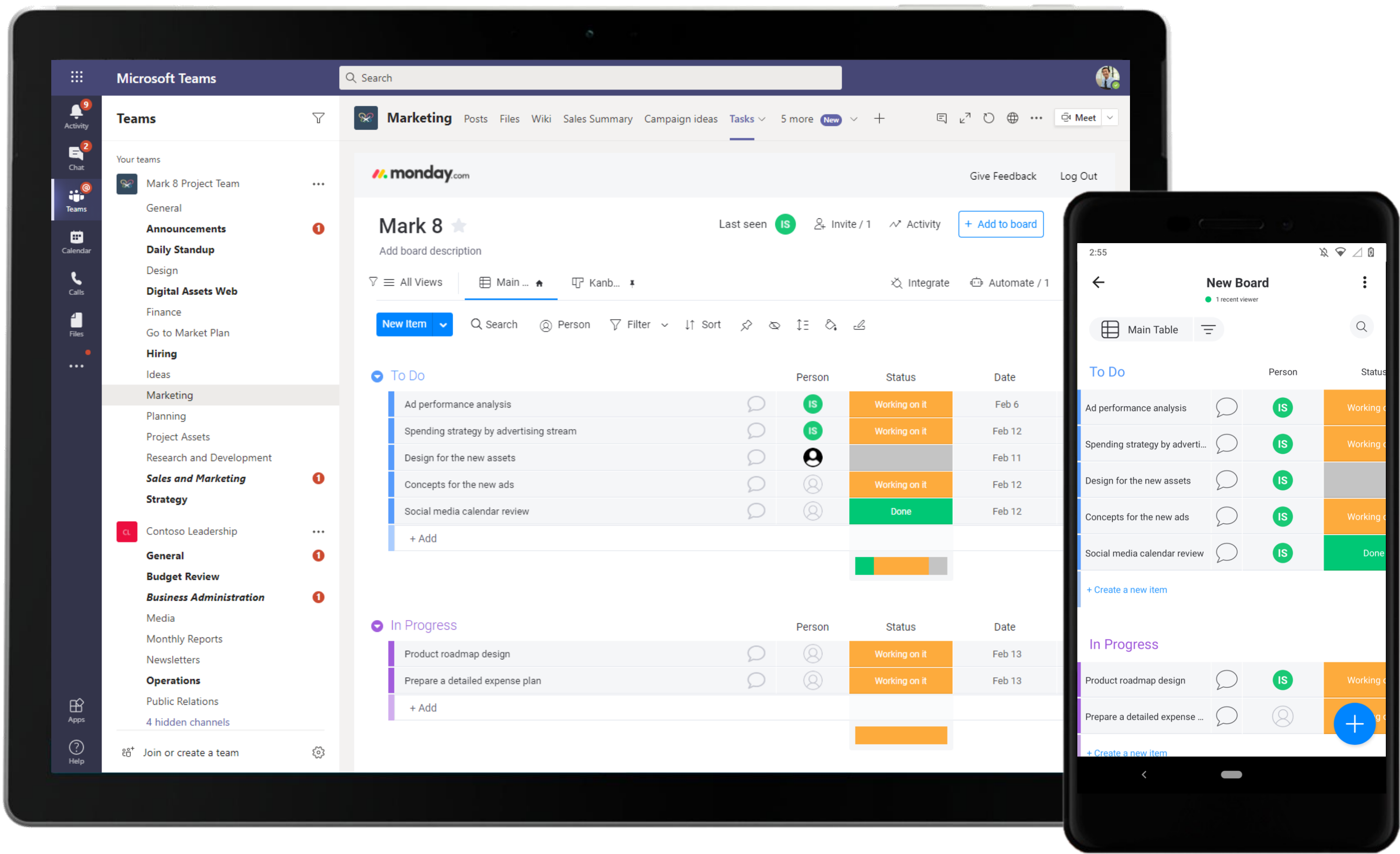
Interact with your favourite apps like Decisions during a meeting and leverage Live captions to keep track of conversations with accurate attribution.



The Decisions app allows you to record decisions taken during the meeting and put them to vote. The Project Manager records the decision to increase the advertising spend to promote a new feature.



The Project Manager updates the team in the channel, roping in relevant team members to help with suggestions and ideas for feature rollout. He uses the @mention feature to call their attention to her post, which also sends out a notification in their Activity Feed.



Use building blocks – such as boards, views, charts, automations, and integrations - to create custom workflow apps to run processes, projects and everyday work with monday.com. This provides complete clarity for the team members regarding the tasks they need to pick up and close out.

Ready to lead?

aka.ms/goTeams 

