

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









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.

Implementation

- Managing Reports and Project • Documents
- Identify High Priority Tasks and ٠ 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 ٠ feature
- Participate in instant, open-channel communication ٠
- Store documents within a cloud-enabled repository using ۲ 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





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Meet the Business Decision Makers Project Management







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?





PowerPoint





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.



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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.





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	Hiring Ideas Marketing Planning Project Assets Research and Development Strategy 1 hidden channel		 Collapse all Irvin Sayers 11/18 3:26 PM This is perfect, Megan Bowen. I believe this plan will significantly help us make excellent progress. I am excited to work on this. Debra Berger 11/18 3:27 PM Yes, totally agree with you, Irvin Sayers. Megan Bowen, this is genius. Well done! Megan Bowen 11/18 3:28 PM Thank you, Debra Berger and Irvin Sayers.
	c Contoso Leadership General Budget Review Media Monthly Reports Newsletters Operations Public Relations		 Irvin Sayers 11/18 3:29 PM Christie Cline, could you please provide approval on this? Christie Cline 11/18 3:35 PM Irvin Sayers, Megan Bowen, these look quite promising. You all have done a great job of putting these strategies together. I will have a word with the Analyst and let you know Irvin Sayers 11/18 3:35 PM Perfect. Thank you so much, Christie Cline. ☺ Keply
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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.





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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.







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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?



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Apps Help	c Contoso Leadership General Budget Review Media Monthly Reports Newsletters Operations Public Relatioship Hidden teams	 تۆ	 Collapse all Alex Wilber Yesterday 1:42 PM Ivin Sayers, Will prepare and present a report to the team soon. Grady Archie Yesterday 1:44 PM This is indeed a very insightful writeup Irvin. Looking forward to hearing from you Alex Wilber Megan Bowen Yesterday 1:51 PM Sean Bowen Yesterday 3:01 PM Feel free to reach out to me if you need my help Alex Wilber.

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.



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



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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.







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.



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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?





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.



Project Management – Strategizing the Way Forward



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



Project Management – Strategizing the Way Forward

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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.





Project Management – Strategizing the Way Forward

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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...

- Schedule meetings using synced calendars, or a meet now ٠ feature
- Participate in instant, open-channel communication ٠
- Store documents within a cloud-enabled repository using ٠ 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







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Meet the Business Decision Makers Project Management







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?









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.



Project Management – Set Up an Environment to Collaborate

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Apps			
? Help			

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.



Project Management – Set Up an Environment to Collaborate

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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.





Project Management – Set Up an Environment to Collaborate



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.


Project Management – Set Up an Environment to Collaborate



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



Project Management – Set Up an Environment to Collaborate

		5
	Microsoft Teams	Q Search
L. Activity	Chat ~ 7 🛛	ildea Generation and Finalization Chat Files Meeting Notes Whiteboard 1 more \vee +
E¶ ¹ Chat ₩	 Recent Idea Generation and Finalizati 1:33 PM You: All right, team, thanks for the prod 	 Irvin Sayers joined the meeting. Irvin Sayers renamed the meeting to Idea Generation and Finalization.
Teams E Calendar	Lynne Robbins 1:03 PM Image: Mark 8 Project Sync Megan: Will do, thanks! 12:08 PM	 Invin Sayers added Ment.io to the meeting. Adele Vance 1:10 PM Looking forward to contributing and discussing ideas as per the latest market trends.
Calls	Budget Review: Mark 8 Project 9:09 AM Christie: GIF Monday.com 2/5 Sent a card	☐ Meeting ended 7m 36s 1:30 PM
Files	• Qubie 2/5 Sent a card	1:31 PM Edited The submitted ideas can be referred here - Campaign Ideas That was a great call, and we will be working on the ideas finalized in the meeting. Lynne, please share the list of ideas we finalized in the call.
	HR App Isaiah: I GIF2/3We Decide Sent a card2/2	Yes Irvin, the ideas are listed here.
	Workday1/28Sent a card1/27Karma1/27	1:33 PM All right, team, thanks for the productive session and the ideas. Allow me a little time to get back to you on this with the further plan of action.
	ServiceDesk Plus Cloud 1/7 Sent a card 1/6	
	Welcome to the Teams Manager! You can Confluence Cloud 12/19 Sent a card	
	AgilePolly 12/17 Trial ended 12/4	
Apps	Pradeep Gupta 12/4 You: Im GIF 12/4 Project Timeline & Resources 12/4 Pradeep: Sample new opportunity cretated	Type a new message
? _{Help}	atSpoke 11/20 Welcome! atSpoke is your company help	A₂ ! ℓ ☺ ☞ ☞ ▷ ♀ ৫ ֎ ≍ ♥ ♫ ™ ↓ ⊛

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.





	Microsoft Teams		Q Search
L. Activity	Chat \checkmark	7 Ø	Bea Generation and Finalization Chat Files Finalized Ideas ∨ 2 more ∨ + Join
= <mark>1</mark> Chat	- Recent		File Home Insert Draw View Help Open in Browser 🗸 🖓 Tell me what you want to do
o ns	Idea Generation and Finali You: All right, team, thanks for		
	Lynne Robbins	1:03 PM	Finalized Ideas
ar	Mark 8 Project Sync Megan: Will do, thanks!	12:08 PM	C Tuesday, February 9, 2021 7:50 AM
5	Budget Review: Mark 8 Pro Christie: 🗃 GIF	oject 9:09 AM	Below are the finalized ideas:
es	Monday.com Sent a card	2/5	 Focus on Social Media Storytelling Highlight Company Culture Find Ways to Add Human into Your Brand Personality
•	Qubie Sent a card	2/5	 Find Ways to Add Humor into Your Brand Personality Create Content Around Trending Topics Feature Your Customers (Testimonials)
	💼 HR App Isaiah: 🗃 GIF	2/3	 Build Hype on Social Media Before Product Launch Use Instagram Shopping
	We Decide Sent a card	2/2	Actionable items:
	Workday Sent a card	1/28	 Ideas finalized must be elaborated with supporting content like content calendar, previous references, if any.
	Karma Sent a card	1/27	 The Campaign timelines must be finalized and submitted to the Finance team for budget allocation Set bi-weekly meetings for review
	ServiceDesk Plus Cloud Sent a card	1/7	
	Teams Manager Welcome to the Teams Manag	1/6 er! You can	
	Confluence Cloud Sent a card	12/19	
	AgilePolly Trial ended	12/17	
	Pradeep Gupta You: 🗃 GIF	12/4	
s	Project Timeline & Resourd Pradeep: Sample new opportu		
2) #p	atSpoke Welcome! atSpoke is your com	11/20 ipany help	

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





Project Management – Set Up an Environment to Collaborate



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.



x 💎 🖉 Mark 8 Task Board Mark 8 Project Team / Marketing Finalize Campaign Timelines (A) Irvin Sayers \times Digital Marketing \times \times Finalize campaign timelines and submit it to the Finance team for budget allocation Share task to Marketing Create task Created tasks (0) 🖒 ⑦ Send feedback 錢 Settings



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?





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.



	Microsoft Teams	
L ity	Teams	Y
Chat	Your teams Mark 8 Project Team General	
	Announcements Daily Standup Design Digital Assets Web Finance Go to Market Plan Hiring Ideas Marketing Planning Project Assets	
	Research and Development Sales and Marketing Strategy Contoso Leadership General Budget Review Media Monthly Reports Newsletters	
5	Operations Public Relations	

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.





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	8		Commission					0.10	D%	0.75		0.20	(0.50	1
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L ⊈	$\langle \rangle$	≡ Start		keting Budget	+										
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The Project Manager uses Excel to build and present data. Create impactful summaries of crucial data with the integrated Excel services.





	Microsoft Teams	Q Search
 Activity	Chat ~ 7 🛛	Budget Review: Mark 8 Project Chat Files Meeting Notes Whiteboard +
Chat Chat Teams	 Recent Idea Generation and Finalizati 1:33 PM You: All right, team, thanks for the prod Mark 8 Project Sync 12:08 PM Megan: Will do, thanks! 	 Irvin Sayers joined the meeting. Irvin Sayers renamed the meeting to . Nestor Wilke and 2 others joined the meeting.
Calendar Calendar Calls	Budget Review: Mark 8 Project 9:09 AM Christie: GIF monday.com 2/5 Sent a card 2/5	8:58 AM Shared a file Business Expense Budget.xlsx ····
Files	Qubie 2/5 Sent a card	Qid Meeting ended 6m 19s 9:06 AM
	Image: Sent a card 2/3	Nestor Wilke 9:07 AM Irvin Sayers, you and your team have been doing a phenomenal job and I am confidant that this budget will position your team for a stellar year. Do send this over to me for the final approval.
	Workday 1/28 Sent a card 1/27	9:08 AM Thanks Nestor! I will send it for your approval
	Sent a card ServiceDesk Plus Cloud 1/7 Sent a card Teams Manager 1/6 Welcome to the Teams Manager! You can	Christie Cline 9:09 AM
	Confluence Cloud 12/19 Sent a card 12/19 Confluence Cloud 12/19 Confluence Cloud 12/19 Confluence Cloud 12/19 Confluence Cloud 12/19 12/17 12/17	
ß	You: GIF Project Timeline & Resources 12/4 Pradeep: Sample new opportunity cretated	LET'S DO THIS.
Apps	atSpoke 11/20 Welcome! atSpoke is your company help	Type a new message
? Help	Isaiah Langer 11/18 Hey Irvin	A₂ ! ∅ ⊕ ⊯ ₽ ₽ ₽ € 8 ★ ♥ 50 ₩ \$ ⊕

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.





 Activity	Busines										
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	9~	Microsoft Sans ∨ 10	- − −	√ <u>√</u> √ <u>A</u>	~ … ≡	~ eb, 🖽 ~	General	✓ ←.0 .00	.00 🔳 🗸 🖪	7~ <u>F</u> ~ É	∄~ ∑ ~ <u></u> 2°
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	4	EXPENSE VARIANCES	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEPT
	5	Employee Costs Wages	\$0.00	\$0.00	\$0.00	(\$500.00)	(\$500.00)	(\$500.00)	\$87,500.00	\$92,400.00	\$92,400.00
	6	Benefits	\$0.00	\$0.00	\$0.00	(\$135.00)	(\$135.00)	(\$135.00)	\$23,625.00	\$24,948.00	\$24,948.00
	7	Subtotal	\$0.00	\$0.00	\$0.00	(\$635.00)	(\$635.00)	(\$635.00)	\$111,125.00	\$117,348.00	\$117,348.00
8 9						(,	(,	(,			
	20										
	21	Marketing Costs									
	22	Web site hosting	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$500.00	\$500.00	\$500.00
	23	Web site updates	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	(\$500.00)	\$200.00	\$200.00	\$200.00
	24	Collateral preparation	\$200.00	\$0.00	\$0.00	(\$500.00)	\$0.00	\$0.00	\$5,000.00	\$0.00	\$0.00
	25	Collateral printing	\$100.00	(\$300.00)	\$100.00	\$100.00	(\$400.00)	\$20.00	\$200.00	\$200.00	\$200.00
	26	Marketing events	\$200.00	(\$200.00)	(\$200.00)	\$300.00	\$500.00	(\$300.00)	\$2,000.00	\$5,000.00	\$2,000.00
	27	Miscellaneous expenses	\$55.00	\$44.00	\$77.00	(\$23.00)	\$13.00	(\$45.00)	\$200.00	\$200.00	\$200.00
	28	Subtotal	\$555.00	(\$456.00)	(\$23.00)	(\$123.00)	\$113.00	(\$825.00)	\$8,100.00	\$6,100.00	\$3,100.00
	29	Training/Travel									
	30										
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	Calculatio	on Mode: Automatic Workbook Statistics								·	 Help Impro

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.



New approval request		
9:38 	Approvals	¤ ♥ ⊿ ∎ Q
	ack to list	
Ø	Mark 8 Project Budget	
ĉô⁺	Nestor Wilke, Enter names here	
~	Require response from all	
	If needed, add extra info here	
C	Custom responses	
0	Add attachment	
	Business Expense Budget.xlsx 123.1 KB	×
Activity	Chat Teams Calendar	••• More
	<	



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?



Project Management – Planning Project Timelines and Resources

	Microsoft Teams		Q Search	
L Activity	Teams	Y	Planning Posts Files Wiki Meeting Notes Free/Busy Calendar ~ 4 more ~ +	Ę
E Chat	Your teams		Schedule a meeting	
Teams	Mark 8 Project Team		Powered by Approved Contact New Meeting ← → Nov 22 - Nov 28, 2020	Vie
Calendar	Announcements Daily Standup		+ email(s) Nov 22 Sun Nov 23 Mon Nov 24 Tue Nov 25 Wed	Nov 26 Thu
Calls	Design Digital Assets Web		Sayers, Irvin Ip	
4	Finance Go to Market Plan		adelev@m365x1 2p Create Meeting	×
Files	Hiring		admin@m365x11 PT 3p	
	ldeas Marketing		Alexw@m365x11 PT 4p Date 26-Nov-2020	м ч
	Planning Project Assets		alland@m365x11 advanced christiec@m365x 5p Title	
	Research and Development Sales and Marketing		Christiec@m365x 5p Project Timeline & Resources	
	Strategy		Image: state of the state	•
	cu Contoso Leadership General		7p ✓ Include Microsoft Teams meeting gradya@m365x1	
	Budget Review Media		PT Bp Schedule Can	cel
	Monthly Reports Newsletters		Clicking schedule will send a calen	_
Apps	Operations Public Relations		jonis@m365x110 PT 10p	
? Help	Hidden teams		leeg@m365x110	
÷	ະວ້ Join or create a team	ŝ	lidiah@m365x11 рт	

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.





	Microsoft Teams		Q Search
L Activity	Chat 🗸	7 Ø	Project Timeline & Resources Chat Files Meeting Notes Whiteboard +
Chat Teams	 Recent AgilePolly Your standup results are in! Project Timeline & Resources Lee Yes L will be sharing the list soor 	1:50 PM 11/20	 Irvin Sayers added Megan Bowen and 4 others to the meeting. Irvin Sayers renamed the meeting to Project Timeline & Resources. 11/20 3:19 PM
Calendar	Lee: Yes, I will be sharing the list soor atSpoke Welcome! atSpoke is your company b		Hi all, we have received a go-ahead for the Mark 8 Project. I've scheduled this call to discuss the w forward and to set a realistic project timeline. Let us also discuss the resources that we would need to meet the deadlines effectively. Make sure to join.
Calls Files	Qubie Sent a card Isaiah Langer Hey Irvin	11/20 11/18	Lee Gu 11/20 3:20 PM Sure! Looking forward to the call.
	Megan Bowen You: Sent an image Christie Cline im GIF	11/18 11/18	Pradeep Gupta 11/20 3:29 PM Really loved what you've done here, Irvin Sayers and team. Way to go.
	Confluence Cloud Sent a card Zoho Projects Your Zoho Projects bot is configured	11/18 11/18 suc	11/20 3:31 PM Thank you all for attending the meeting. It was a great one. Now that we have established the timeline for the project, we must decide the human capital needed to meet the timeline. As discussed, Lee Gu will be noting down a list of resources required for the project.
	Site24x7 Sent a card	11/17	Lee Gu 11/20 3:39 PM Yes, I will be sharing the list soon.
			Today
Apps			
Help			Type a new message
L 🗄			$A_{\mathscr{J}}$! \mathscr{C} \bigcirc of \bigcirc P \Rightarrow P \Rightarrow P

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.



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	Microsoft Teams	[Q Search				
Q Activity	Project Timeline & Resources	07:03	😪 Planni	ng Posts Files Wiki Sprint Progress	Mark 8 ~ 3 more ~ +		@∠C⊕
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Calendar	Teams	Ŧ	1 ()	Cost Estimates		AV Adele Vance	6 days
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Calls	Your teams		3 🔾	Feasibility		Miriam Graham	11 days
Files	See Mark 8 Project Team		4 (Market Analysis		IS	9 days
	General Announcements		5 🔿	Refine Design		GA Grady Archie	16 days
	Daily Standup		6 🔾	Sub-Systems		Diego Siciliani	12 days
	Design Digital Assets Web		7 ()	Architectures		AV 11	19 days
	Finance		8 ()	Make-buy analysis		۲	14 days
	Go to Market Plan		9 🔾	Quality Control Def		Miriam Graham	6 days
	Hiring Ideas		10 🔘	Tooling		GA Grady Archie	11 days
	Marketing		11 ()	Materials		B 1	17 days
	Planning Project Assets		12 🔾	Complete Definition		AV Adele Vance	10 days
	Research and Development		+	Add new task			
	Strategy						
	c Contoso Leadership						
	General						
B	Budget Review Feedback						
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? Help	oo Join or create a team	द्धि					

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.





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шм	icrosoft Teams	Q Search		
Activity Te	eams	7 8 P	anning Posts Files Wiki Meeting Notes Cost Reduction Strategy 4 more \vee +	am
Chat	ar teams Mark 8 Project Team		Irvin Sayers 11/19 5:43 PM Calendar BOT view Calendar BOT 11/19 5:43 PM	
Teams	General Announcements		Schedule at Approved Contact (If tab is not installed use this link)	
Calendar	Daily Standup		November 20, 2020	
Calls	Design Digital Assets Web Finance		Lee Gu 11/20 3:52 PM Required Human Capital Hi team, here is the list of resources that we will need – Mark 8 Resources . I have divided the list according to the staff men	nber
Files	Go to Market Plan Hiring		have and the ones we will need to hire. Please review, Irvin Sayers , and let me know if I have missed anything. Cc: Diego Siciliani	
	ldeas Marketing Planning		Irvin Sayers 11/20 3:53 PM Awesome! This looks fine. Please go ahead with this list, Diego Siciliani.	
	Project Assets		Diego Siciliani 11/20 3:55 PM Cool. The team will start looking for candidates immediately. I will get in touch to schedule interviews.	
	Research and Development		Lee Gu 11/20 3:56 PM	
	Sales and Marketing Strategy			
	Contoso Leadership General			
	Budget Review Media			
	Monthly Reports Newsletters		Thanks!	
	Operations Public Relations		← Reply	
? Help Hid	dden teams			
	5 [*] Join or create a team	<u>نې</u>	New conversation	

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.





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<mark>ب</mark> 9 Activity	Teams	Y	Planning Posts Files Wiki M	Meeting Notes Mark 8 Project Resou	\sim 5 more \sim +	⊑ ∠" C
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Calendar	Daily Standup Design					
L Calls	Digital Assets Web		Mark 8 Project Res	ources		
4	Finance					
Files	Go to Market Plan					
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	ldeas Marketing		Quality Control Manager	Graphic Designer		
	Planning		Security Manager	Software Developer		
	Project Assets		Environment Manager	Assistant Marketing Manager		
	Research and Development		Accountant	Purchase Manager		
	Sales and Marketing Strategy	0				
	_		Sales Representative	Sales Representative		
	Contoso Leadership		Customer Service Representative	Assistant Accountant		
	General Budget Review	0	Administrative Assistant	Marketing Specialist		
	Business Administration	0		Business Analyst		
	Media	-		Human Resource Personnel		
	Monthly Reports					
	Newsletters			Customer Service Representative		
ŝ	Operations Public Relations					
Apps	4 hidden channels					
? Help	ిలి⁺ Join or create a team	\$	Add tag			All changes

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 ٠ feature
- Participate in instant, open-channel communication ٠
- 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







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rPoint	Ment.io	Lucidchart	SharePoint
3	•••		BOARDS
rnote	Asana	Calendar BOT	Kudos Boards
//			~
oho ojects	Lists	Tasks by Planner and To Do	Workstreams.ai

Meet the Business Decision Makers Project Management



"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."

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





Finance Manager

• Review financial reports and build



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?





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.



Project Management – Managing Reports and Project Documents

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Activity	Ē	Analyzing Performance and	Profitability Chat Details	I	Join
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Calendar		Mark 8 Project Team > Anno	puncements	Irvin Unkn	n Sayers nown
C alls	0			Meg Unkn	gan Bowe
4	÷	to discuss the way ahead. The Financ	orming exceptionally well in the market, and we have a meeting with the stakeholders ce team is in the process of preparing a quarterly Profitability statement. I am ey inputs that we require from the Sales and Marketing team.	Debi Unkn	ora Berger
Files		I look forward to discussing more of		Chris Unkn	istie Cline nown
Apps Help		Microsoft Teams mee Join on your computer or mobile a Click here to join the meeting Or call in (audio only) ±1469-965-2451,,847963889# Unit Phone Conference ID: 847 963 889 Find a local number Reset PIN Learn More Meeting options	app ited States, Dallas		

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.



Project Management – Managing Reports and Project Documents



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.



Project Management – Managing Reports and Project Documents



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.



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Page 3 of 4 266 words English (U.S.) Text Pre					

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.



Project Management – Managing Reports and Project Documents

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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 guick 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?





Lists



Tasks by Planner and To Do
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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.



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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.



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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.



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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 ٠ feature
- Participate in instant, open-channel communication ٠
- Store documents within a cloud-enabled repository using ٠ 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 ٠ projects from within a single environment







			S
rPoint	Ment.io	Lucidchart	SharePoint
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rnote	Asana	Calendar BOT	Kudos Boards
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oho ojects	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 ٠ project Ensure minimum or zero bugs in • the final document

Escalate any risk or delays that can • impact the project

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

- Provide on-site leadership for
- project
- Procure adequate resources to achieve project objectives





Sr. Project Manager

project team by motivating team members to meet project goals Prepare estimates and detailed project plan for all phases of the



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?







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.



VO @ 4G

Mark 8 Project Brief

Mark 8 Project Team / Project Assets

Miriam Graham Director

Project Brief

17:17

 \leftarrow

The purpose of the Project Brief is to encapsulate all the finally agreed key features of this design so that the client is fully aware of what he will get and the Prime Contractor and the key Supply Chain partners can proceed with the Scheme Design confident that each will be working towards the completion of a consistent whole.

Requirements within the Project Brief must be expressed in functional performance, rather than engineering, terms in order to provide the maximum opportunity for the Prime Contractor and his Supply Chain to devise the most appropriate options which meet those requirements. Physical, statutory and operational constraints must be clearly identified.

. 7

Project Management – Keep a Project Team In Sync and Well-informed



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.



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	Project Scope.docx
	Project Scope Management Plan
	CONTENTS
	1. Definitions
	2
	2. Executive Summary
	3. Project Scope
	4. Project Dates
	Major Milestones
	Key Meeting Dates and Decisions
	5. Project Resources
	6. Functional Roles and Responsibilities
	7. Budget Impact
	8. Success Criteria
Give Feedb	



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.



Project Management – Keep a Project Team In Sync and Well-informed



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!



Project Management – Keep a Project Team In Sync and Well-informed



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?







Microsoft Stream

	Microsoft Teams		Q Search
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Chat Teams	Your teams Mark 8 Project Team General Announcements		Adele Vance 11/18 7:05 PM Edited Brainstorm Hi Team, I'm scheduling this meeting to brainstorm ideas for special offers and deals that we could create for the upcoming hol Looking forward to an exciting brainstorming session. Brainstorm
E Calendar Calendar Calls Files	Daily Standup Design Digital Assets Web Finance Go to Market Plan Hiring		Wednesday, November 18, 2020 @ 7:30 PM Collapse all Image: Solution of the coll of the
	Ideas Marketing Planning Project Assets Research and Development Sales and Marketing Strategy		 Brainstorm started Miriam Graham 11/18 7:20 PM Hi Adele Vance, I'm stuck in another meeting that's running over. I might not join the brainstorming session on time, but to the meeting's recording. All the best, everyone! Adele Vance 11/18 7:20 PM Sure, Miriam Graham Meeting Recorded by: Adele Vance
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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 realtime. The Senior Project Manager lets the team to know she won't be able to attend the meeting.





Project Management – Manage Multiple Meetings with Ease



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.



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L Activity	Teams	See Ideas Posts Files Wiki Brainstorming Ideas Tasks + \Box \angle^7 \bigcirc \bigoplus	C
Chat Teams Calendar Calls Files	Your teams Mark 8 Project Team General Announcements Daily Standup Design Digital Assets Web Finance Go to Market Plan Hiring	File Home Insert Draw View Help Open in Browser Q Tell me what you want to do $\checkmark \sim \bigcirc $	- ~
	Ideas Marketing Planning Project Assets Research and Development Sales and Marketing Strategy	the product category and time of the day. Wheel of savings – Customers can spin the wheel to receive discounts on all products or specific products based on what they've won. The wheel must be designed to look attractive and exciting. Free Gifts & Giveaways – This is a strategy that has been very successful for us before and has caused a 40% spike in traffic during our last giveaway. This will also be an excellent option to fall back on if the others don't work. We could offer our products and services as rewards and daily giveaways.	
Apps Help	General Budget Review Media Monthly Reports Newsletters Operations Public Relations Hidden teams	Reward PointsReward points based on the product's price that can be redeemed for other products that are allotted a certain number of reward points.This strategy would appeal to a large number of customers and also help build long term relationships with our customers while increasing customers to continue purchasing products from us to redeem their reward points	
Ŀ	టి ⁺ Join or create a team భ		

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.



Å

13:10 \leftarrow

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⊕ ••• ⊡ Meet

Brainstorm – 18th November 2020

Wednesday, November 18, 2020 7:28 PM

Flash Sale – Savings of 25% but only for a short time. The flash sale can be opened at regular intervals throughout the day to maintain continuous traffic and excitement. We could modify the discount percentage offered by the product category and time of the day.

<u>Wheel of savings</u> – Customers can spin the wheel to receive discounts on all products or specific products based on what they've won. The wheel must be designed to look attractive and exciting.

Free Gifts & Giveaways – This is a strategy that has been very successful for us before and has caused a 40% spike in traffic during our last giveaway. This will also be an excellent option to fall back on if the others don't work. We could offer our products and services as rewards and daily giveaways.

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	Microsoft Teams		Q Search	
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-	Your teams Your teams Mark 8 Project Team General Announcements Daily Standup Design Digital Assets Web Finance Go to Market Plan Hiring Ideas Marketing Planning Project Assets Research and Development Sales and Marketing Strategy Contoso Leadership Budget Review Media Monthly Reports	✓	 Ideas Posts Files Wiki Brainstorming Ideas Tasks + This was a great call! We've heard some brilliant ideas and strategies that I'm confidant would work very we Johanna Lorenz 11/18 7:33 PM The compiled the ideas that everyone liked the most in the tab here - Brainstorming Ideas Mriam Graham 11/18 7:33 PM Thanks. everyone! I went through the list of ideas. They sound great. Will go through the recording in some er Reply Miriam Graham 11/18 7:42 PM Myron Tants Myron Tants Markan Branch 11/18 7:42 PM Myron Tants Myron Tants Markan Branch 11/18 7:42 PM Myron Tants Myron Tants Markan Branch 11/18 7:42 PM Markan Branch 11/18 7:42 PM Myron Tants Myron Tants Markan Branch 11/18 7:42 PM Markan Branch 11/18 7:43 PM Thanks. Miriam Graham 11/18 7:43 PM Thanks	ell. e time. I even if we d h Sales' and j
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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.





Ideas Posts Files Wiki Brainstorming Ideas Tasks ∨ + Image: Comparison of the ideal products on which to offer discounts In Progress Image: Comparison of the ideal products on which to offer discounts Image: Comparison of the wheel of savings - First Draft Image: Comparison of the wheel of savings - First Draft Social media assets Image: Comparison of the wheel of savings - First Draft	Teams Ideas Posts Files Wiki Brainstorming Jasks > + Image: Comparison of the ideal products on which to offer discounts Your teams Image: Comparison of the ideal products on which to offer discounts Image: Comparison of the wheel of savings - First Draft Image: Compa	Teams Ideas Rots Files With Brainstorming Basis Files Files							
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anning Curate customer list Freelancer contracts	Sales and Marketing Strategy	Sales and Marketing Strategy Contoso Leadership ···· General Budget Review Media Monthly Reports Newsletters	Endar Lendar Calls	Mark 8 Project TeamGeneralAnnouncementsDaily StandupDesignDigital Assets WebFinanceGo to Market PlanHiringIdeasMarketingPlanning		To Do Create a list of the ideal products on which to offer discounts Design options for the wheel of savings – First Draft Copy for marketing collateral Edit email drafts Curate customer list	In Progress Work out the structure of the discounts and products eligible Finalize timelines and targets Social media assets	Blocked	
dget Review edia onthly Reports ewsletters berations blic Relations	Public Relations Hidden teams			ిణి⁺ Join or create a team	3	Trello			Open

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 96



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.



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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.





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Chat Calendar Calendar Files	Your teamsSeeMark 8 Project TeamGeneralGeneralAnnouncementsDaily StandupDesignDigital Assets WebFinanceGo to Market PlanHiringIdeasMarketingPlanningProject AssetsResearch and DevelopmentStrategy1 hidden channelContoso LeadershipGeneralBudget ReviewMediaMonthly ReportsNewsletters		Ivin Sayers 11/19:10 PM Edited Daily Standup It Mark 8 Project Fleam. I've observed longer load times than usual for our website home page. Let's quickly sync up to discuss forward and address the blockers that some of you have highlighted. Johanna Lorenz, could you please investigate the issue with the load time before the meeting? Imark 2 Broject Fleam. I've observed longer load times than usual for our website home page. Let's quickly sync up to discuss forward and address the blockers that some of you have highlighted. Johanna Lorenz, could you please investigate the issue with the load time before the meeting? Imark 2 Clearing Blockers Imark 2 Clearing Blockers Imark 2 Clearing Blockers Imark 2 Clearing Blockers ended: 13m 54s Imark 3 due to a heavy image that was uploaded on the home page without optimization for web viewing. I've optiming and the load time is back to normal. Imark 3 due to a heavy image that was uploaded on the home page without optimization for web viewing. I've optiming and the load time is back to normal. Imark 3 for Clearing the blockers Irvin Sayers Lidia Holloway. Will go ahead with the next steps. Imark 3 for your updates. Let's begin working on the fixes that we discussed. Imark 3 sign new tasks and reprioritize our work items based on our discussion. Imark 3 Hory 2.31 PM Thanks all for your updates. Let's begin working on the fixes that we discussed. Imark 3 sign new tasks and repr
Apps	Operations Public Relations		← Reply November 20, 2020
? Help	Hidden teams		New conversation

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.





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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.





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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



the meeting agenda apitalize on a successful feature

diture for the week. orward via channel meetings.

Which app integrations on Teams made it possible?





monday.com

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		Hi All, I'm scheduling this weekly sync, so that we're all on the same page and keep track of project timelines. Do feel free to suggest agenda items that you think we need to discuss.	
Apps			
? Help			

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.



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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.



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					10:50 AM That's a good suggestion Megan Bowen. We will discuss this during our call.
			Lynne Robbins	10:51 AM	
		Û	Meeting ended 1	5m 15s 11:59 AM	
					ll and I'm glad that we're all clear about our goals and tasks. ase go ahead with coordinating all advertising spending for the next week on r feature.
			Megan Bowen Will do, thank		
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Use the Decisions app to share the meeting agenda with participants before a meeting beings to ensure that everyone is one the same page. The Project Manager shares the meeting agenda before the call.



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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.



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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.





Microsoft Teams

Ready to lead?



