



# Get started with Microsoft Teams

Tips & tricks to help all types of teams collaborate better

# Welcome to Teams, the hub for teamwork in Office 365.

Teams is your one-stop for chatting, meetings, calls, and file sharing—a combination that gives everyone a place to get more done. In this guide, you'll find tips to make the most of Teams across your organization.

Get more from Teams! Find additional guidance, tutorials, and tips at [aka.ms/successwithteams](https://aka.ms/successwithteams)



Marketing



Sales



Finance



Human  
Resources



Information  
Technology



Engineering



Project  
Management

# The first 10 things to do in Teams

Before you set up your shared workspace in Teams, get organized with these basic tips.



### 1. Start with chat

Create a small group chat to communicate in the moment. Rename the chat and 'favorite' easy reference.

### 2. Connect from anywhere

Download the Microsoft Teams desktop and mobile apps to enable teamwork from anywhere.

### 3. Go big

Create larger teams with dedicated channels to collaborate on specific topics, projects, disciplines—whatever you like. Better to have fewer, larger teams with more channels than many, small teams with few channels.

### 4. Customize channels

Upload files to a channel and pin frequently used files to make it easy for everyone to find.

### 5. Add apps to channels

Integrate favorite apps and services—like Word, PowerPoint, Excel, Power BI, Planner, SurveyMonkey, HootSuite and more—with team chats and meetings.

### 6. Consolidate 'need to know' content

Use OneNote or Wiki features to spotlight important content, meeting notes, best practices, and goals without cluttering conversations.

### 7. Spotlight resources

Pin key websites used to track news, performance, live site monitoring or metric tracking.

### 8. Elevate email conversations

Forward an email to a Teams channel to get faster feedback within a threaded chat—attachments will upload automatically, ready for collaboration and co-authoring.

### 9. Share content from other services

Set up connectors to push rich content into Microsoft Teams from services like Trello, GitHub, Bing News, or Twitter; and get notified when users engage with that service.

### 10. Help foster active channels

Stay active in channels and **@team** to highlight posts for the whole group.

A woman with dark hair, wearing a dark blue patterned top, is looking towards the right side of the frame. She is holding a pink pen in her right hand. In the foreground, there are blurred hands and a small bouquet of white daisies. The background shows a window with a grid pattern. The word "Marketing" is overlaid in white text on the left side of the image.

# Marketing





Marketing teams need to create, collaborate and show results while working with a diverse group of people from both inside and outside the company. Why not do it all in one place? Teams provides a shared workspace for all conversations, files, and third-party services. Now it's easier to manage marketing campaigns and social channels, collaborate on content creation, and plan events.

1. Create a new team, Marketing. Invite internal and external users from all marketing groups, including PR, Brand and Design.
2. Add channels for marketing initiatives, projects and teams, such as Go-to-Market, Public Relations, Event Planning and Budget; as well as channels where marketers can interact and communicate with agencies, consultants, and partners using secure guest access.
3. For each channel, connect relevant third-party services, such as Bing News Alerts, Twitter Connector, Adobe Creative Cloud, HootSuite and YouTube.
4. Create and store marketing assets—such as plans, briefs, press releases and design files—in the Files section.
5. Pin the marketing plan, budget and/or campaign landing page to relevant channels for easy reference.
6. Schedule and hold meetings in Teams using audio and video conferencing features, as well as chat and file-sharing.

A close-up, shallow depth-of-field photograph of two women. The woman on the right has long, wavy, reddish-brown hair and is looking down with a focused expression. The woman on the left is partially visible in profile, looking towards the same point. The background is blurred, suggesting an office or meeting environment.

# Sales



Teams can help sales quickly build proposals with input from different stakeholders, while making it easier to manage longer term projects and programs, such as planning, training and sales readiness. Collaboration, reporting, and knowledge sharing can happen in one place, helping sales professionals everywhere work together to meet sales objectives.

1. Create a new team for your entire sales organization or a team for each sales segment.
2. Add channels, such as Sales Readiness, Sales Planning, RFPs/Proposals, Wins, and Best Practices; as well as a channel for general topics.
3. Schedule recurring team meetings, such as a monthly business review.
4. Upload team documents to relevant channels, for example sales playbooks and guides in the Sales Readiness channel, RFP documents in the RFP/Proposals channel.
5. Provide important data and customer information in one place. Pin apps used by your sales team—PowerBI, Planner, task management apps like Trello—to each channel.
6. Set up connectors, such as an RSS feed for customer updates.



A photograph of a business meeting in a modern office. In the foreground, a woman with short, curly brown hair, wearing a dark blazer over a white top, is seated at a desk and looking down at a laptop. A man with a beard and brown hair, wearing a dark blue sweater, stands behind her, leaning over her shoulder and pointing at the laptop screen. In the background, two other men are visible: one on the left, seen in profile, and another in the center, wearing a light-colored blazer and looking towards the camera. The office has large windows and a clean, professional aesthetic.

# Finance



Finance teams need to aggregate and report on data while conducting business reviews on a regular cadence. Teams provides a hub for file and data sharing, conversations, and meetings backed by the security and compliance of Microsoft.

1. Create a new team for your entire finance organization.
2. Add channels for Finance Reviews, Business Insights, Audits, Governance and Compliance.
3. Schedule recurring team meetings, such as a monthly business review.
4. Upload team files to the channels, such as annual financial statement reviews and audit reports.
5. Pin relevant apps used by the team—Excel, Power BI, Planner—or pin critical files, intranet portals, or websites.

A man in a green jacket is standing and holding a tablet, looking at it while interacting with a group of people seated at a table in a restaurant. The background shows large windows and a tiled wall with a yellow light fixture. The text "Human Resources" is overlaid in white on the left side of the image.

# Human Resources



Teams can help HR professionals manage recruitment and employee onboarding activities, including sharing resumes and interview notes, keeping track of candidate information, communicating hiring decisions, and sharing new employee documents.

1. Create a new team for your HR department.
2. Add channels for Recruitment, Training, Events, Reviews, and Onboarding.
3. Schedule meetings, planning, interviews, candidate reviews all in Teams.
4. Upload files to Teams channels such as HR policies, candidate information, offers, training or recruitment guidance notes, HR portals, feedback forms and surveys.
5. Use a shared OneNote or Wiki for candidate feedback.
6. Host training sessions using audio/video conferencing in Teams. Share agendas, presentations, and post-training surveys using third party apps like Survey Monkey.
7. Pin apps used by your HR team, such as Excel, Power BI, and Planner.



# Information Technology

A man with dark hair, wearing a dark suit jacket over a maroon sweater, is looking down at a smartphone in his hands. He is wearing earbuds, and a thin black cable is visible. He has a black bag slung over his shoulder. The background is a blurred city street with a stone wall on the left and a blue car on the right.





Teams provides IT professionals with a single hub to plan, execute, and manage all phases of infrastructure deployments and rollouts—a useful tool to help drive transformation and change management across the organization.

1. Create a new team and add members from IT and other stakeholders from across the company.
2. Add channels for Service Strategy, Problem, Incident and Change, Deployment, Health and Reporting, Readiness and Adoption, Support and Management and Governance.
3. Upload important files or logs to the channels.
4. Pin relevant apps such as Word, Excel or Planner.
5. Set up connectors, such as bots for process automation.
6. Schedule and hold recurring or impromptu meetings with key stakeholders.

A young man with short dark hair, wearing a dark jacket over a blue shirt, is holding a silver laptop and a black tablet. He is looking directly at the camera with a slight smile. The background is a blurred indoor setting with warm lighting. The word "Engineering" is overlaid in large white text on the left side of the image.

# Engineering



When delivering a new feature, engineers move quickly through ideation, development and deployment. Teams is integrated with developer tools that enable everyone to stay on track during sprints, collaborate in real-time, and fix a bug from anywhere.

1. Create a new team for your engineering group and add key stakeholders across the company.
2. Add channels for General, Feature Releases, Testing, Feedback, Competitive Information, Go-to-Market, Research and Product Analytics to organize and discuss these topics.
3. Upload relevant team files to the channels so everyone can easily find the latest versions.
4. Add tabs for quick visibility to apps and services your team uses, like Planner and Power BI.
5. Add tabs and connectors for developer tools like VSTS, JIRA, BitBucket, GitHub and more to view and triage issues and pull requests.
6. Schedule and hold recurring stand-up meetings with key stakeholders.



A photograph of a cafe interior with several people. In the foreground, a person wearing a brown beret and a blue plaid shirt is partially visible on the left. In the center, a woman with long dark hair and glasses, wearing a brown quilted jacket, stands and holds a white card. Behind her, a man in a dark suit is seated at a wooden table, looking down. Next to him, a woman with dark hair, wearing a blue patterned sweater, is seated with her back to the camera. To the right, another man in a green jacket is seated at a table, also with his back to the camera. The cafe has white tiled walls, a sign that says "FROZEN TUBES" in the background, and a small vase of red flowers on a table. The text "Project Management" is overlaid in large white letters on the left side of the image.

# Project Management



Project managers are often overloaded with planning, meeting, and communication tools and services. Teams enables collaboration with a central hub to share files, manage stakeholder meetings, and track progress across multiple projects.

1. Create a team for each project, and then add stakeholders from across the company.
2. Add channels, such as Planning, Budget, Analytics, Reviews and Feedback.
3. Upload project documents to the channel, such as budgets, schedules, information sources, and guidelines.
4. Pin relevant apps used by your team within each channel, such as Planner, Trello, Smartsheet and Power BI.
5. Set up connectors, such as bots for process automation.
6. Schedule and hold recurring or impromptu meetings with key stakeholders.



A man with dark hair and a beard, wearing a dark suit and tie, is looking down at a laptop. A woman with long, wavy brown hair, wearing a white jacket over a black and white striped shirt, is leaning over his shoulder, pointing at the screen with a red pen. They appear to be in a professional or educational setting, possibly a classroom or office.

Take the  
next step

Instead of sending an email to your team, start the conversation in Teams by inviting your colleagues to a team or starting a group chat!

- Add channels
  - Create tabs to integrate the tools and services your team uses
  - Use bots to provide automatic updates and notifications
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- Personalize your workspace with a unique profile picture
  - Select Options to change your app settings, notification preferences, language, and more
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