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10 Ways To Collaborate Efficiently with Microsoft Teams

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About the Author

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As a Microsoft 365 Enterprise Administrator Expert and Microsoft MVP in Office apps and services, Nate has years of experience helping organizations deploy Microsoft 365 apps and services and promoting their usage, governance, and adoption. His work has included administrative, analyst, and trainer roles in the higher education, healthcare, corporate, and finance sectors.

Nate is also the author of several books including an O365 administration cookbook, multiple Microsoft 365 exam guides, and a handful of smaller publications on SharePoint, OneNote, and leading advocate groups.

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Introduction

Microsoft Teams is changing the way we work together and how we approach our routine business processes. For some, Microsoft Teams has been deployed simply as a chat and meeting tool not too dissimilar from how organizations might have used Skype for Business in the past. As true as it may be that Microsoft Teams does replace Skype for Business basic communication functionality, there is much more to the application that may be underutilized in your organization right now.

Flexible Chats

Pin and create individual or custom group chats

Chances are if you are already chatting in Teams with your colleagues, you know the basics. But in Teams, there are a few additional things that can take your chat to the next level.

For example, did you know that even for one-on-one chats with another colleague you have a private storage space for documents you share with one another? Any document you send to another person via chat (whether one-on-one or group chat) is stored on that specific chat's **Files** tab as seen in Figure 1. In this example, my private chat with Leanora has a **Files** tab in which I have sent two files to her in the past that appear in our shared **Files** space now.

The individual files in your chat's tab are stored in the sender's OneDrive but appear together in one library so you and your colleague(s) have a central location for any and all files shared during your chats.

Your chats can also be pinned if they are frequent or important. For example, if you chat with twenty different colleagues throughout the day, the order of your chats in Teams shuffles around, always putting the most recent at the top of your list. But if you want a group of teammates or a frequent collaborator always pinned to the top, you can do just that as seen in Figure 2.
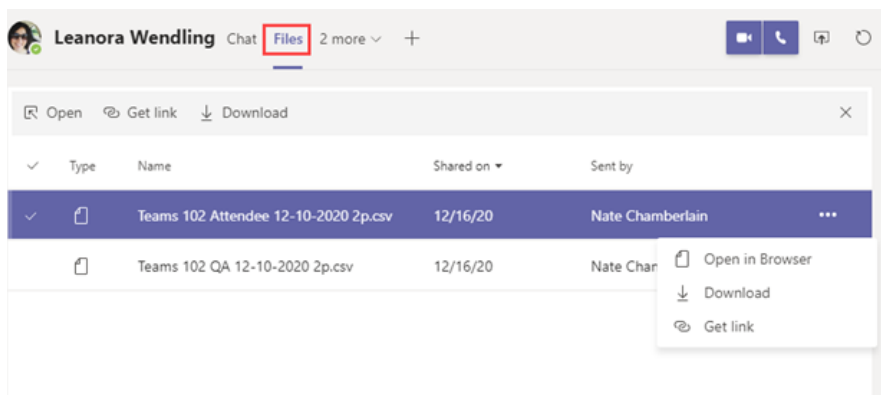

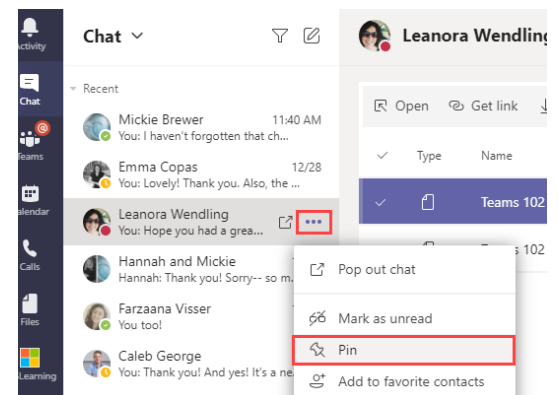*Figure 1: Files tab for a private one-on-one or group chat in Teams.*

Figure 2: How to pin a chat in Microsoft Teams.

Once you pin a chat, it will appear in a new collapsible section above the existing **Recent** section as seen in Figure 3.

And lastly, if there's a group of individuals with whom you regularly collaborate, why not create a custom group with a unique name and add that group chat to your new **Pinned** section?

To create a new group, simply hit Ctrl+N on your keyboard from anywhere in Teams to begin creating the group. You can then type in names and select the correct individuals until your group is complete, as seen in progress in Figure 4.

Once your group is complete, and you've begun typing a message to them they will appear in a comma-delimited list in your chat panel. In the example below, it would appear as something like **Alison, Hannah, Jessica, +2**.

Next, we'll want to rename this to something more concise and clearer. To do this, click the pencil icon next to the listing of names at the top of the chat as seen in Figure 5.
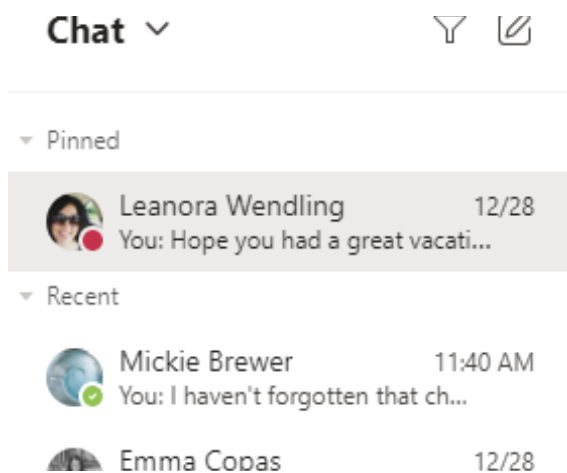

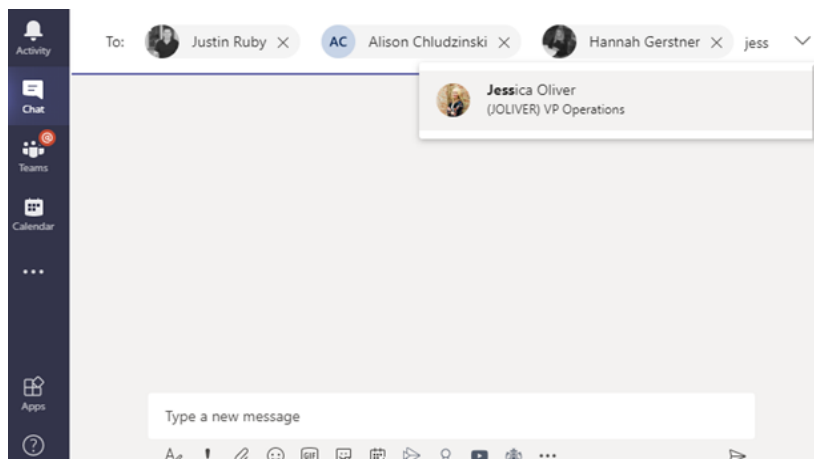Figure 3: Pinned chats appear in their own group above Recent chats.

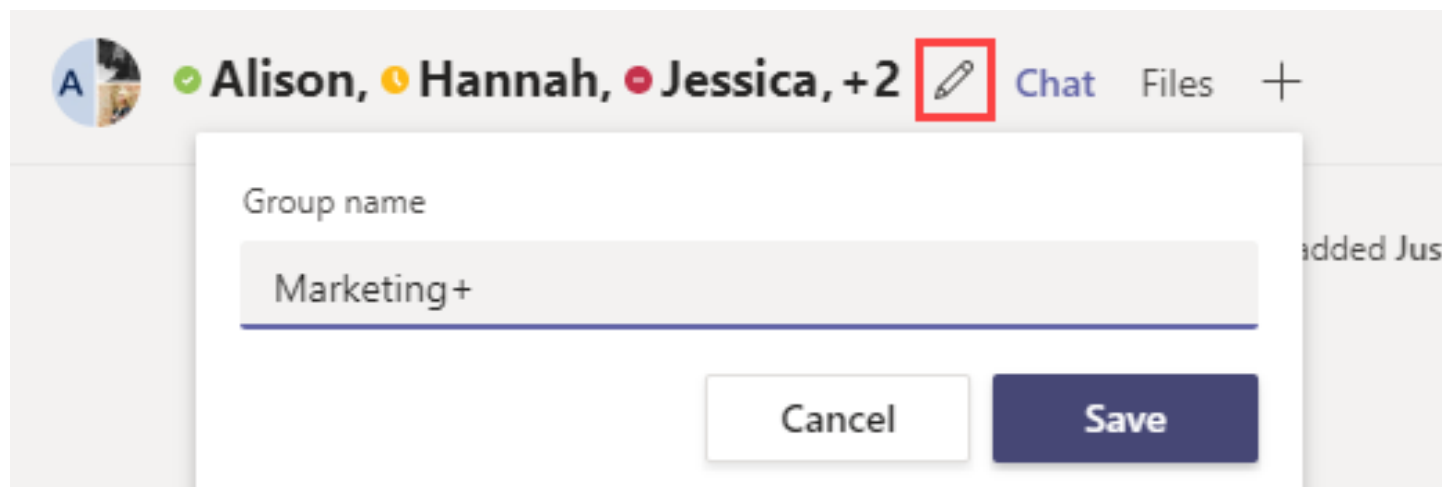Figure 4: A new group chat being created by selecting individuals who will be a part of the new group.

Figure 5: Renaming a group chat to something clearer.

Forms & Polls

Gather feedback and opinions with minimal effort

No need to invest in third-party poll or survey software for simple forms and polls. Microsoft's own Forms app can be added as a permanent channel tab or embedded in a conversation easily. Haven't tried Forms yet? Create your first Form today here.

To add Forms as a tab in a meeting chat (not private chat) or channel click the **Add a tab** button (+) along the top ribbon when viewing the respective resource. This will bring up a dialog similar to what's shown in Figure 6 where you can choose **Forms** and then choose which specific Form to set as the tab. This can be a pre-existing form, or one you create right inside of Teams.
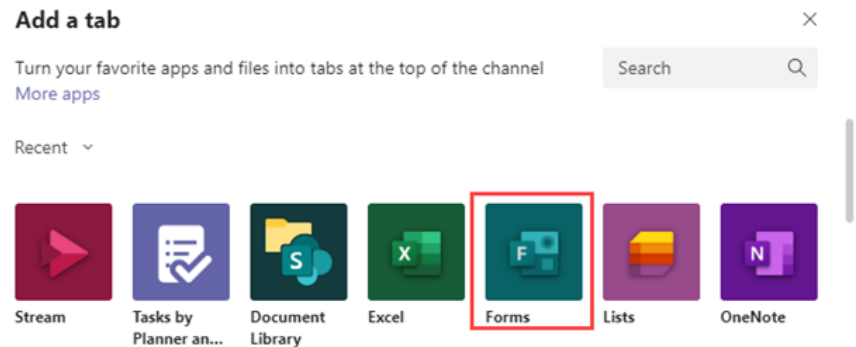

Figure 6: Microsoft's Forms is available as a tab in chats and channels.

To add Forms as an embedded post in an existing private chat or channel conversation (so not a separate tab) you can paste a share link to the finished poll or form directly into a message to link out to it OR you can add Forms to the chat (ellipsis below the compose message box) and create a quick poll anytime as a truly embedded, interactive post as seen in Figure 7.

The best thing about Forms? It is included with your M365 subscription at no additional cost and is not limited in responses or the number of forms, polls, and quizzes you can create!
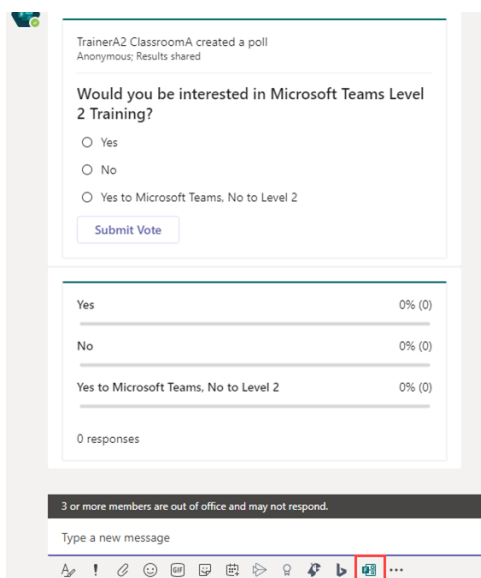

Figure 7: Forms, when added to a chat, lets you create quick, on-the-fly polls for that channel or conversation or chat.

Note: Polly is a third-party alternative option if you're looking for something with a bit more features but is limited on the free plan to 25 responses (can be upgraded to a free trial for 500 responses but has other limitations). But for small groups, this might be worth exploring. It has advanced features like scheduling recurring polls to post to specific channels (i.e. polling the team every Monday morning for their company-sponsored lunch order).

Inclusive Meetings

Expand your reach with Teams meetings + live captions, recordings, and transcripts

It can be difficult to get everyone on a team together for a call at a mutually available time. The ability to record meetings and post them to the channel means that users unable to attend can still see the meeting and read the meeting chat when they get a chance. You can see **Start recording** on the ellipsis (three dots) menu during a meeting as shown in Figure 8. Depending on your organization's settings and policies, not all users may be able to record but typically the owner/leader of a meeting will have this ability if individual attendees do not. Check with your Teams administrator if you are having trouble finding this option.

Attendees can also elect to **Turn on live captions** for themselves, making it so that any audio spoken during a call by any user shows the speaker's display name followed by automatically transcribed text of what they are saying in near real-time. Encourage your colleagues to use this feature for additional clarity or convenience by using the ellipsis (three dots) during a call as shown in Figure 8.

Lastly, every video that is stored in Stream gets automatically transcribed so that users can search text that may have been spoken during the call. For example, during an HR Town Hall about benefits, someone may wish to search an hour-long recording for any time "enrollment" was spoken. Stream makes that possible. Upload your first video to Stream and check back after a while to explore your own transcript and search ability.

Read important information about how meeting and group chat call recordings will soon be saved in OneDrive and SharePoint in early 2021. You'll also find additional information about prerequisites for using Stream.
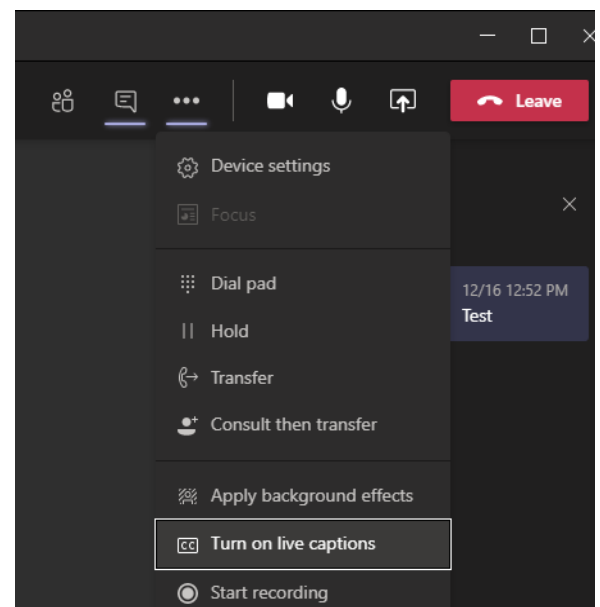

Figure 8: The ellipsis menu during a video call in Teams, showing Turn of Live captions.

Office Apps

Co-author documents together in real time

Stop playing hot potato with documents as email attachments and work on documents together in real time using Microsoft Teams' co-authoring feature. You can co-author OneNote notebooks, Excel workbooks, Word documents, or PowerPoint presentations.
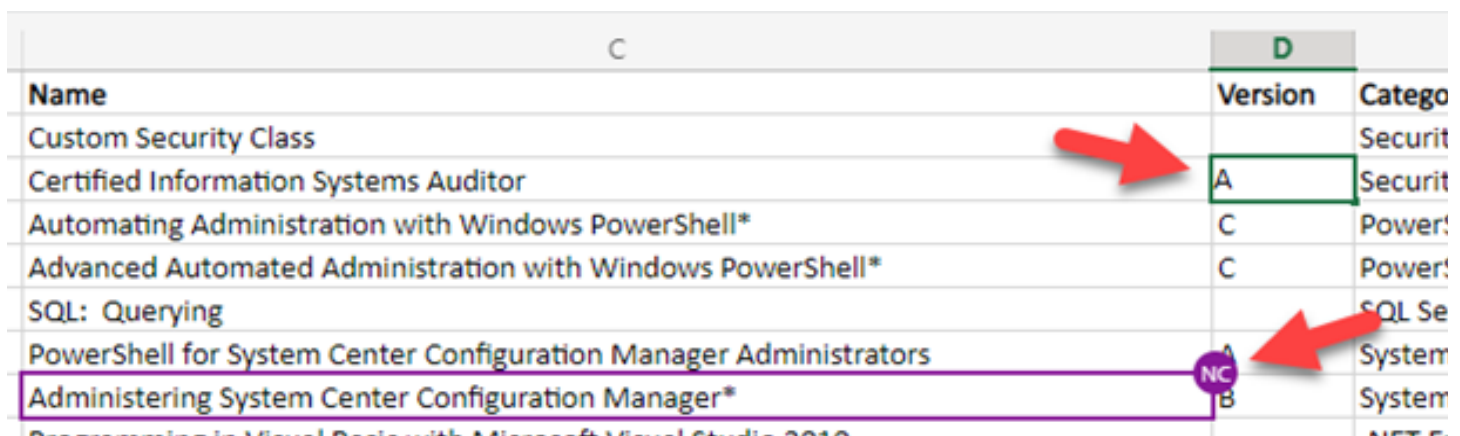
To get started, go to the Files tab for any channel or chat, select an Office document's name and it will open inside the relevant Office web app within the Teams interface. Any other team members who do the same thing (and who have editing rights to the document) will be able to edit the document simultaneously with you. You'll be able to easily identify where the other user is in the document by initials and a color-coded cursor or cell-selector as shown in Figure 9.

Being able to co-author doesn't always mean simultaneous editing. It's also advantageous because you'll know that every user editing it will always be using the same version of the document, and you don't have to worry about the Reply All conundrum where different team members have varying versions of the document stored in their inbox.

A popular way users co-author in organizations is with OneNote. Here are some ideas to co-author in OneNote:

- A meeting agendas and minutes notebook with section for each meeting type and pages within each for dates.
- Managers split responsibility for attending various meetings and share a notebook for transparency in news and tasks.
- Conference attendees attend different sessions and want to share knowledge in the shared notebook.
- A manager uses password-protected sections for each direct reports for monthly one-on-one meetings.

The possibilities for co-authoring are endless. How could your team benefit from shared, transparent authoring of documents and resources?

Figure 9: Two users co-authoring an Excel worksheet.

Planner

Coordinate projects and deadlines

Planner is a [standalone web app](#) you can use in your Microsoft 365 subscription. It also integrates with Teams, and has recently been renamed **Tasks by Planner and To Do**. A plan is basically a collection of buckets you define that each contain tasks. Tasks can have subtasks, labels, different assignees, and much more as shown in Figure 10.

In Figure 10 below, you can see how a plan appears when it's added as a tab in an existing channel. Users can choose to group and filter their view of the shared plan in any way they like (by bucket, status, assigned to, label, and more).

You can also add Tasks by Planner and To Do as an app in Teams that combines all your plans in a central location as shown in Figure 11. This way users don't need to click into specific teams and channels to find all their tasks.
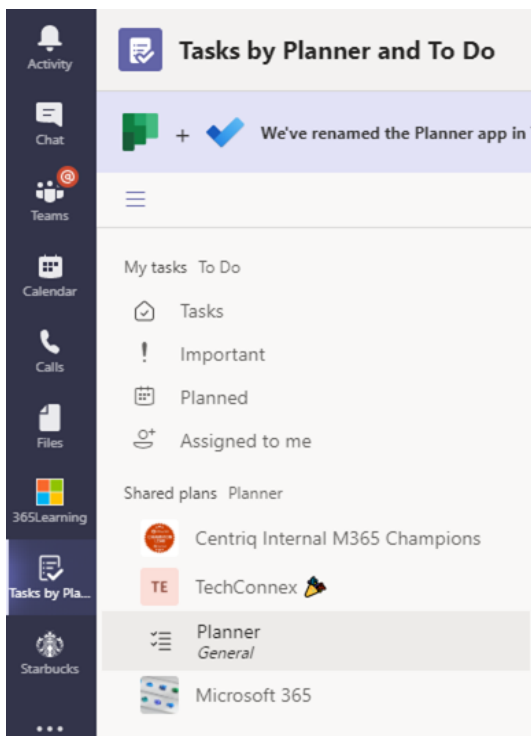

Figure 10: A task being configured in the Tasks by Planner and To Do tab of a channel.
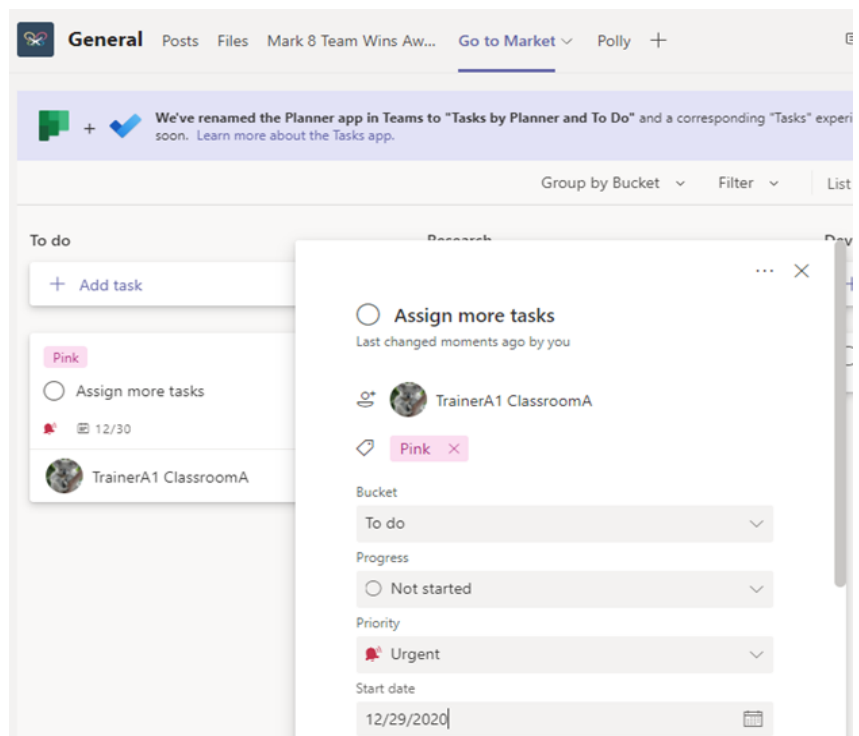

Figure 11: The shared plans available via the Tasks by Planner and To Do app in Teams.

Power Automate Workflows

Minimize the manual and mundane

Power Automate allows users in your organization to automate otherwise repetitive tasks. These can involve virtually any Microsoft 365 app AND can include third-party apps such as Twitter, Slack, or Google suite products. Some examples:

- Post on Teams when a Twitter tweet is posted matching certain criteria
- Post a message to Teams when a new task is created in Planner
- Notify the team of new Forms responses
- Request approval in Teams for a selected item in SharePoint
- Post a message in Teams for a selected item or file
- Alert me (email or phone) when I'm mentioned in Teams

Figure 12 shows a flow being built using one of the templates mentioned above. Power Automate visually shows the flow and is point-and-click plus drag-and-drop friendly making automation accessible to a much larger user-base. In this example, the flow will post a message to the Contoso Team's General channel when a new task is created in the team's Planner plan. In addition to their impressive template library, you can build any automation from scratch, step-by-step, making your workflow 100% customized and perfect for your own unique business processes.

Each cloud flow can be triggered on a schedule (every Monday), based on event (i.e. a document is added), or instant/on demand (by mobile app button or SharePoint manual start). For any new workflow, just think of which apps/connectors you're using and what conditions/logic need to apply to get information from A to Z.
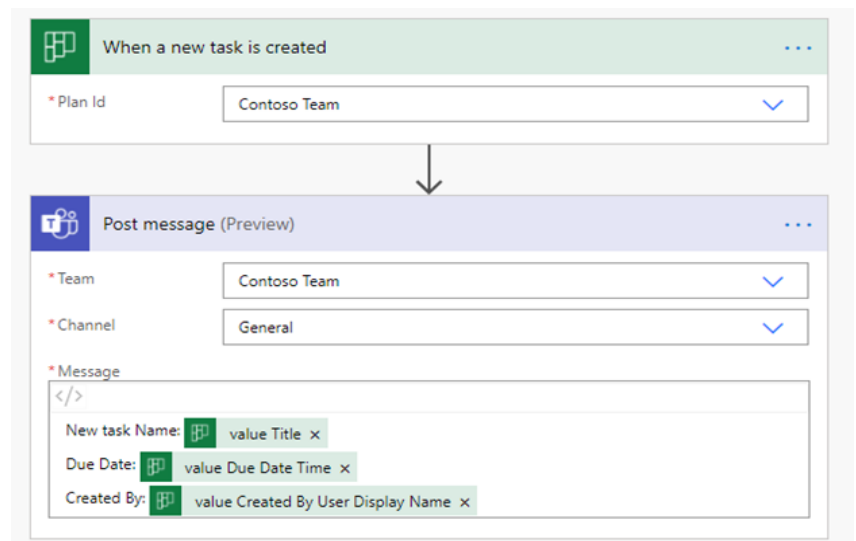
Check out Power Automate for yourself.

Figure 12: A Power Automate flow being built that posts a message to a team's General channel when a new task is created in that team's Planner plan.

Praise

Recognize and encourage teammates

Praise is a Microsoft app that can be added to Teams through the **More apps** ellipsis (three dots) on the left-hand navigation menu of Teams. Just search for **Praise** and add the first result as shown in Figure 13.

Once added, you will see an icon below message composition boxes in chats and channels that resembles a ribbon. Click that to send praise to a colleague. Your organization can create custom badges or use out-of-the-box badges like those shown in Figure 14.

When a badge is chosen, you can choose a recipient (defaults to chat recipient if being send in a one-on-one private chat) and add a message. A preview of how the recognition appears is shown in Figure 15.

Praise makes it easy to recognize colleagues in a digital world and keep engagement strong. Recognizing someone publicly in a channel conversation gives other colleagues the chance to chime in on the replies to add to the praise themselves.
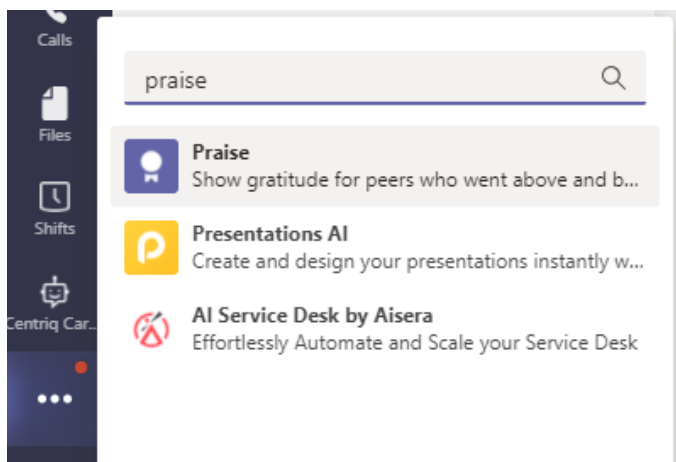

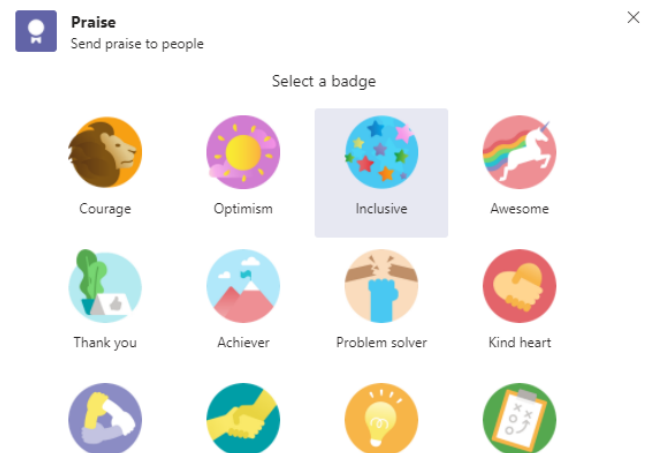Figure 13: The Praise app can be searched and added as an app in Teams.

Figure 14: Default badges available in the Praise app when recognizing a colleague.
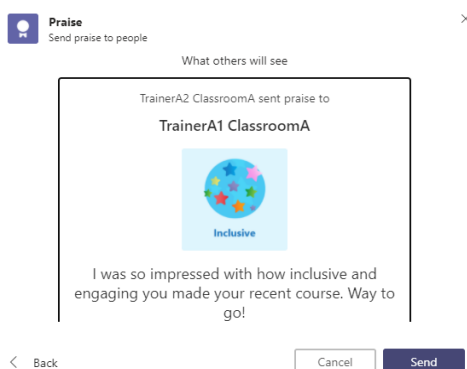

Figure 15: An inclusive badge being sent to a colleague in a channel, recognizing them for exceptional work.

Shifts

Schedule, swap, and request hourly shifts

Shifts is another Microsoft app built-in to Teams. Shifts can be used for hourly employees working scheduled shifts or for volunteers on a committee or event.

Shifts allows users to request time off, swap shifts, or offer shifts to other team members. Figure 16 shows me requesting to swap a shift with Herbert Potter's shift. This request can then be sent to a team owner for approval, or can be auto-approved using a Power Automate flow.

Shifts can be used with the Teams mobile app to allow for easy clock-in/clock-out functionality on-the-go and puts employee or volunteer schedules in the palms of team members' hands.

Ultimately, Shifts can be used as simply or complex as you wish. At its core, a team owner would create and publish a schedule for the team and whether or not you use clock-in/clock-out or requests is up to you.

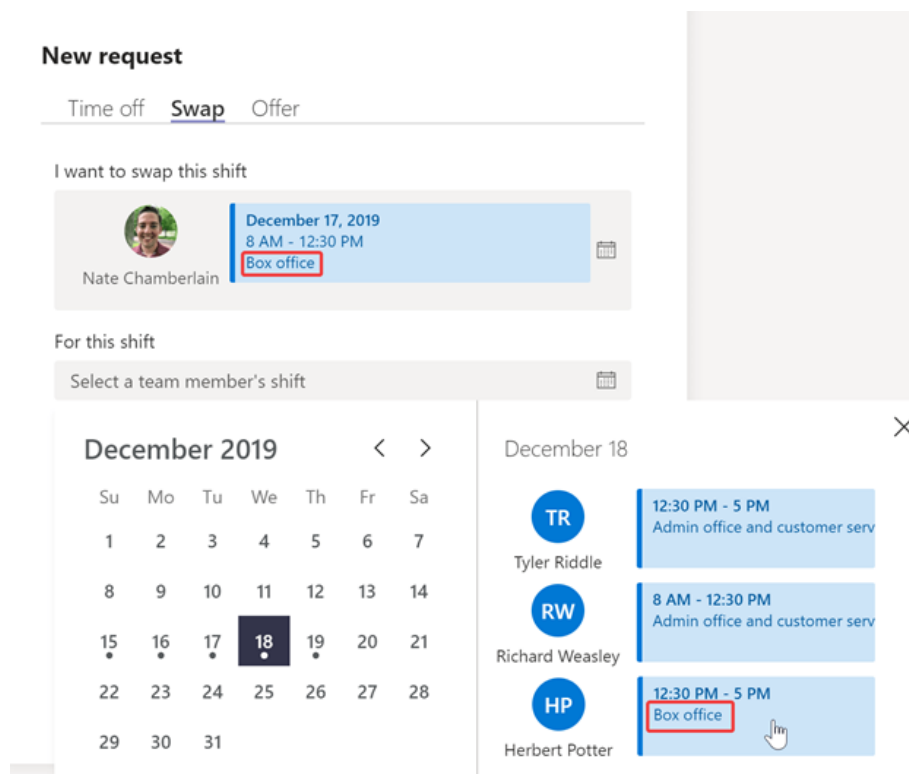You can learn more about getting started with Shifts in my post here.

Figure 16: Nate requests a swap shift with Herbert in the Shifts app in Teams.

Teams On The Go

Start collaborating at your desk and finish on-the-go with web, mobile, and desktop options

While we focus primarily on the desktop application, Teams has two other ways for users to interact Teams content depending on their current environment and location. You can use Teams from any web browser, meaning even a hotel's business center can connect you to your work. Just sign in to office.com from anywhere with your work or school account and select Teams.

There is also a mobile app that lets you finish chats and conversations on the go, as well as access your files from anywhere. From the mobile app, you can still see and use activity, chats, files, calendar, Shifts, and much more but in an optimized-for-mobile interface. Figure 17 shows a one-on-one private chat and a channel conversation side-by-side, respectively. You will notice the Files tab on both, mentioned in the first section of this article.
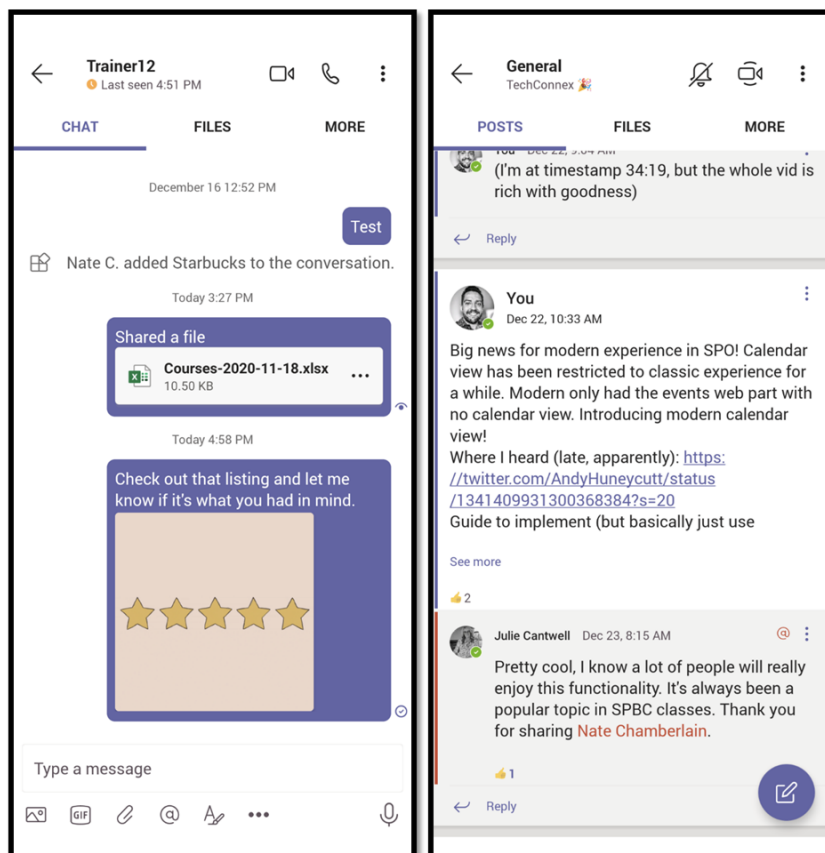
You can download the Teams mobile app here.

Figure 17: Mobile chat and channel conversations, respectively.

Third Party App Integrations

Bring everything you use as a team together in one place

Third-party applications vary widely from organization to organization. But to give you an idea of the sort of applications that can be used within Teams, thereby creating a single-pane-of-glass experience for your users, here is a listing of some of the more popular third-party apps available:

- IT apps like ServiceNow and Jira Cloud

- HR apps like Workday and LMS365

- Project management apps like Trello and Monday

- Document signing apps like Zoho Sign and Adobe Sign

- Education apps like Flipgrid and Kahoot!

Adding these third-party apps used by your company centralizes the work your users do each day and reduces the time and stress associated with frequent context-switching.

You can find and search for other apps by using the ellipsis from the left-hand navigation menu of Teams, then choosing **More apps**. You can filter and search apps there, as shown in Figure 18 where we are looking at Top picks.
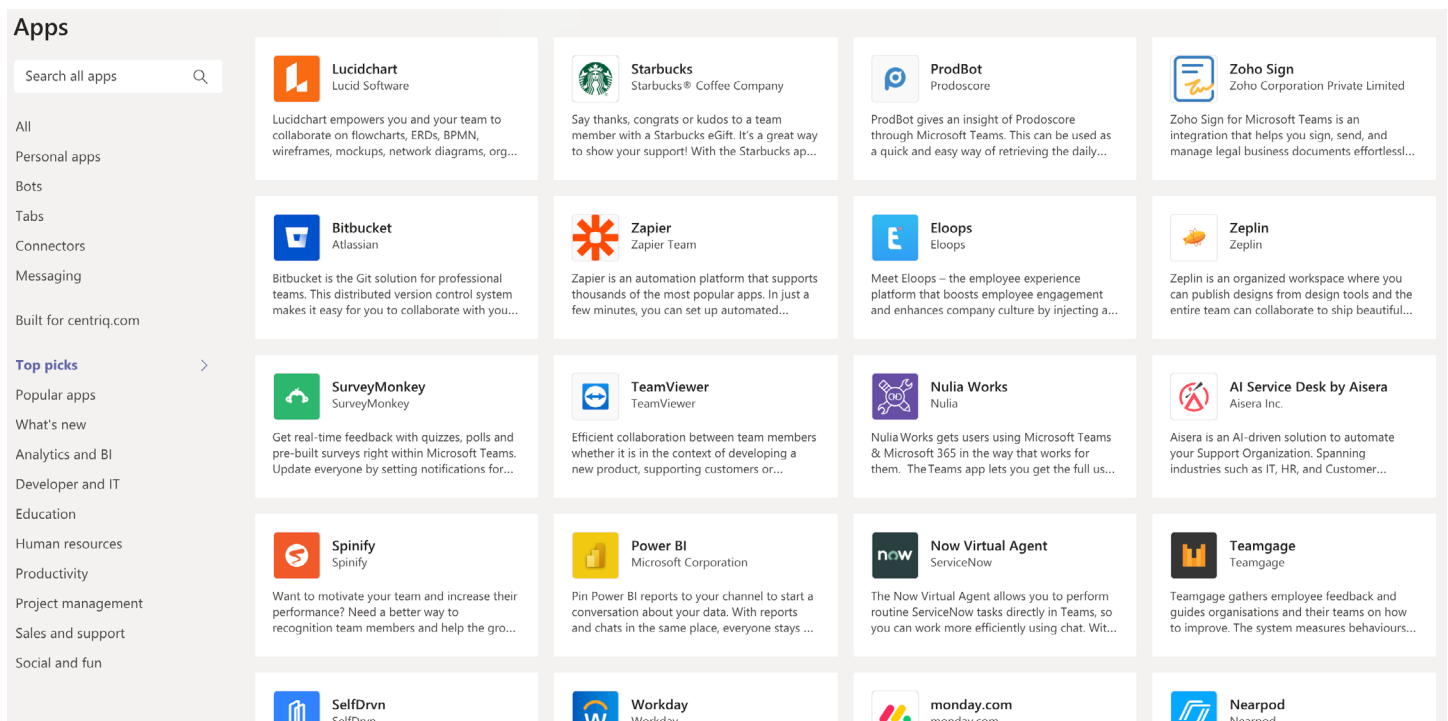

Figure 18: Apps in the Top picks category in Teams.

Conclusion

We've covered 10 ways you may not yet be using Microsoft Teams. Each of these adds value to your investment in Microsoft 365 and unlocks new, innovative ways of working together online in a time when many of us are primarily remote for the first time.

If you would like to learn more or receive custom training on one or more of these topics please reach out to Centriq Training at (913) 322-7000 or www.centriq.com/M365.