

Effective Project Management with MS Teams



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About me:

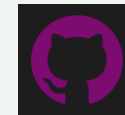
- 20+ years experience
- 14+ times Microsoft MVP
- Delivers solutions globally on M365
 - Strategy, Consulting, Development, Architecture, Migration
- Founder of ChitChattr.com & ExpertsInside.com



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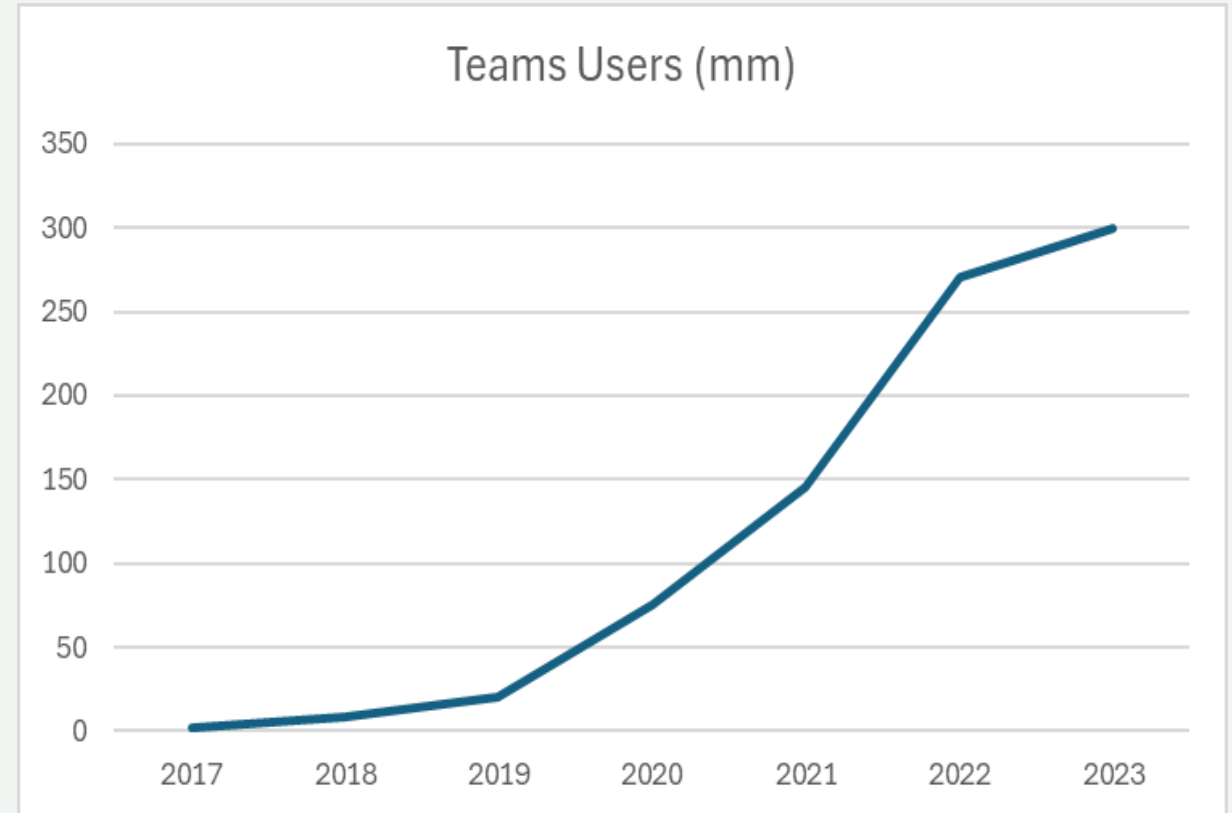
MS Teams Facts and Stats

Teams is Microsoft's fastest growing business app ever

Microsoft Teams reached 300 million users in 2023

Teams is used by 91 of the Fortune 100 companies

1M+ companies use Teams as their default messaging platform

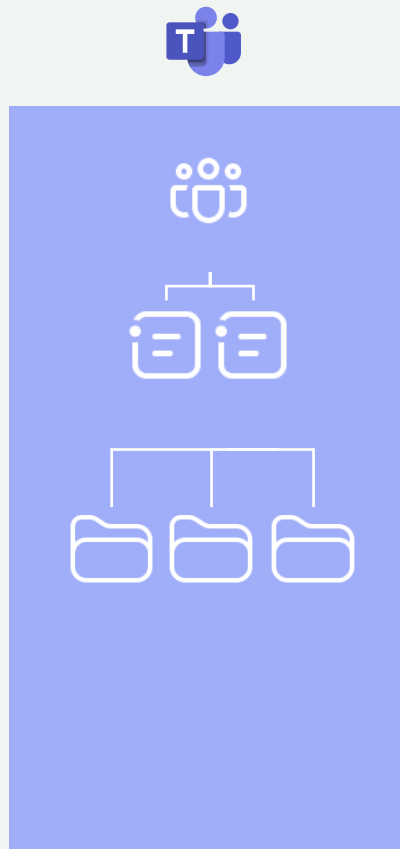


There's a lot that goes into a project

- Artifacts (Documents and digital assets)
- Timelines
- Task Lists
- Conversations
- Notes
- Meeting minutes
- Meeting recordings
- Budgets
- Calendars
- Time sheets
- Templates
- Emails

Teams Taxonomy

Smaller Projects / Early Days – “Channel as a Project”



Teams App

Teams

Working groups

Channels

Projects

- Private channels for sensitive projects
- Shared channels for shared projects

Folders

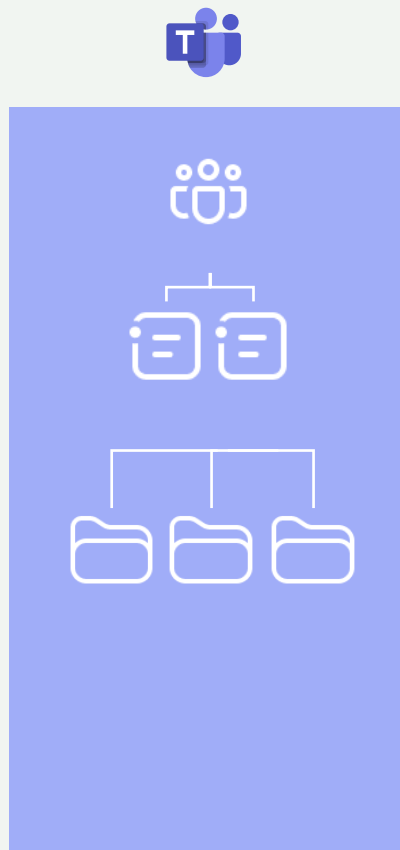
Topics / Departments / Phases

Project artifacts



Teams Taxonomy

Large Projects / More Mature – “Teams as a Project”



Teams App

Teams

Project

Channels

Topics / Departments / Phases

- “General” channel for project-wide resources
- Private channels for sensitive info
- Shared channels for vendors

Folders

Project artifacts

Microsoft Teams Day in the life – IT Project Manager

Jamal is an IT project manager with Contoso Technologies and is responsible for making sure IT projects are meeting stakeholders needs, and delivered on time and within budget.

7:45 AM
Jamal uses his Teams mobile app to get up to speed the activity feed as he travels to work and joins the daily stand up call remotely.

8:30 AM
At the office, he navigates to the Azure DevOps dashboard tab in Teams. Jamal reviews his projects and notes a few trends that are concerning.

9:30 AM
On Teams he asks for additional data points related to projects risks and @ mentions specific individuals to get their attention.

11:30 AM
Jamal joins a project review meeting in Teams, shares his screen, and navigates to the Planner tab to review key activities by owner and adjusts due dates.

2:00 PM
He prepares his meeting notes and replays the Teams cloud based meeting recording for things that he may have missed. He @mentions the channel with updates and action items in Planner.

3:30 PM
Jamal gets notified in Teams of a new bug that was posted in the channel from the Azure DevOps connector. He @mentions experts to help to resolve in time for their release date.

4:30 PM
In Teams he goes to the Financial app tab to update current resource costs for several of his projects.

6:00 PM
Jamal receives another notification from Azure DevOps notifying him that the bug is being resolved. He prepares for his weekly status report and posts it into the PMO Teams site @ mentioning the team.

Get started with Teams today!



Microsoft Teams Day in the life - Compliance Officer

Diego is Compliance Officer with Contoso Technologies working closely with IT to ensure that employees abide by internal policies and regulations set by regulatory bodies. He reviews and defines compliance policies to prevent unethical, illegal, improper and under-use of resources provided. Additionally he is responsible for security and prevention of confidential and sensitive company data.

7:45 AM
Diego starts his day by reviewing the activity feed using his Teams mobile app. He identifies a post where he was @mentioned with high priority by his manager about a newly announced regulation that will go into effect in a couple of months.

8:30 AM
On his way to work he schedules a meeting with his compliance and the IT team using the Outlook mobile app, to discuss next steps to implement the new policy at Contoso. Since most employees work remotely, Diego sets it up as an online meeting.

10:00 AM
Diego's team and the IT team join the meeting to discuss the new regulation and to define the triggers, labels and outcomes for potential policies that are needed. Diego shares the screen with the details of the regulation. During the discussion, he uses the built-in Meeting Notes functionality in Teams to take notes and for the team to upload any relevant files to work on during the meeting together. The meeting is also recorded for the folks that were unable to make it.

11:30 AM
After the call, Diego goes through the meeting notes and files, summarizes the policy requirements that he pins as a tab in the Teams channel. He @mentions his manager as an FYI for feedback, and assigns tasks using Planner to various folks in this team and the IT team.

2:00 PM
Diego navigates to the Office 365 Security & Compliance center that is pinned as a tab in their team. Because he is an administrator he can see the various areas to configure and he reviews the settings for his later meeting with Patti and Jamal.

3:30 PM
Diego, Patti, and Jamal quickly start a call in Teams. Jamal shares his screen while using the Office365 Admin Portal to create the minimal set of label options that info workers can use to adhere to the regulations for certain data.

4:30 PM
Now that the implementation is complete, Patti and Jamal close the Planner tasks assigned to them. Diego gets notified of the completion of the tasks and quickly notifies everyone in the Teams channel.

5:00 PM
Diego's manager who follows the channel conversations gets notified of the update and starts a private chat to congratulate Diego of the quick and swift implementation of the policy so their company is ready whenever the new regulation goes live. He uses a Giphy to better communicate the win!

Download the Teams app on your PC and mobile today. >



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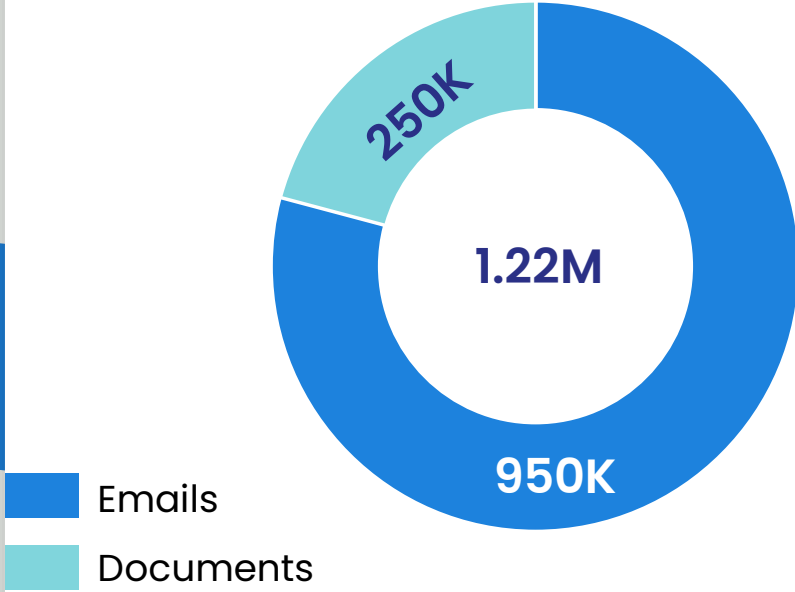
Emails saved in Teams using harmon.ie



Emails must be part of the party!!!



Documents and Email uploaded to Teams using harmon.ie in 2023



Add emails to Teams

Demo



Teams Project Management - summary



Construct into teams, channels, folders

Consider colors & icons, private & shared channels



Add tabs for Microsoft apps + 3rd party apps

e.g. Timeline, task list, notes, meeting minutes, budget, calendars



Meetings in channels

Automatic recordings



Document mgmt.

Channel docs in specific channel, pin important docs



Email mgmt.

Sharing emails, discussions on emails, email views

Q&A



Download 14-day trial

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Schedule a demo

<https://harmon.ie/request-demo>