Mastering Microsoft Teams

Course outline

Provided by: Performance Management Consultants – PMC Training

Reference no.	289-26
Duration	1.00 day(s) | 6:00 hours [1]
Website link	https://pmctraining.com/training/mastering-microsoft-teams/

Unlock Seamless Collaboration with Microsoft Teams!

In today's fast-paced business world, effective collaboration is key to success. Our Mastering Microsoft Teams workshop is designed to equip your team with the essential skills and advanced features of Microsoft Teams, transforming the way you communicate, manage projects, and collaborate.

This one-day workshop covers everything you need to streamline operations, enhance productivity, and foster seamless teamwork. If you're looking to improve group coordination and integrate powerful tools like Planner, OneNote, and Forms, this training will elevate your team's capabilities and keep you ahead in the digital workspace.

Learning outcomes

At the end of this workshop, you will be able to:

- Confidently navigate and utilize the core features of Microsoft Teams, including chat, file sharing, and channel management.
- Effectively manage private conversations, group chats, and seamlessly integrate messaging tools to improve collaboration.
- Create and manage Teams, Groups, and Channels, with an understanding of permissions and best practices for team organization.
- Use integrated tools like Microsoft Planner, Tasks, and To-Do to manage team projects and track progress efficiently.
- Schedule, host, and manage meetings with advanced features such as breakout rooms, screen sharing, and meeting notes.
- Incorporate OneNote for collaborative notes, use Microsoft Forms for polls and surveys, share video content via Stream, and create interactive lists with Loop.
- Utilize Microsoft's AI-driven CoPilot features to summarize meetings, capture insights, and streamline post-meeting tasks *(note that this outcome requires a Microsoft CoPilot license).*

---

[1] *The course hours reflect teaching time that often correlate with continuing education credits (CEC) or professional development units (PDU). Please check with your profession's governing body, as there is no universal approach.*

Introduction to Microsoft Teams
- Overview of Microsoft Teams and its role within Microsoft 365
- Navigating the interface: Desktop, Web, and Mobile versions
- Key components: Activity Feed, Chat, Teams, and Calendar

Private Conversations and Messaging in Teams
- Using direct messaging for private or small-group conversations
- @Mentions, reactions, and status updates
- Sharing files in chat and using the in-built document viewer
- Managing message notifications and priorities

Creating and Managing Teams, Groups & Channels
- Understanding the difference between Teams, Groups, and Channels
- Creating and managing Teams and Channels for departments/projects
- Setting permissions for Team members and guests

Collaborating Within a Team
- Sharing and collaborating on files within Teams
- Using SharePoint and OneDrive for document storage
- Co-authoring documents in real-time
- Managing task assignments with Microsoft Planner integration

Enhancing Collaboration with Integrated Apps
- Tasks, To-Do, and Planner: Assign, track, and manage tasks within Groups
- Channel Calendar: Managing schedules with the channel-specific calendar feature
- OneNote Integration: Collaborating and managing team notes using OneNote within Teams

Advanced Collaboration Features
- Forms in Channels: Creating polls, quizzes, and surveys with Microsoft Forms
- Sharing Video Content with Stream: Uploading, sharing, and organizing video content within Teams
- Interactive Lists with Loop: Creating real-time, interactive lists for team collaboration

Scheduling and Managing Meetings
- Scheduling/Inviting participants and setting permissions
- Hosting and joining a Teams meeting
- Using screen sharing, whiteboard, and meeting notes
- Recording and transcribing meetings
- Breakout Rooms for group discussions

Interactive Tools: Polls, Quizzes, and Forms
- Adding live polls and quizzes during meetings to gather instant feedback
- Using Microsoft Forms for interactive elements in presentations and group work

OPTIONAL - AI and CoPilot Features for Enhanced Meetings *(requires a Microsoft CoPilot license)*
- Using CoPilot to generate meeting summaries and insights
- AI-driven meeting insights and action items

Prerequisites

Have an Office 365 account and a good knowledge of Microsoft 365 basic tools.

For AI and Copilot features, a Microsoft CoPilot license should be active.

Who should attend this course?

Microsoft 365 users of who need to work in Microsoft Teams.