

GW Information Technology

Microsoft Teams Best Practice Guide

Overview

This document provides guidance on the use of Microsoft Teams (MS Teams), specifically in the areas of team and channel creation, and in the use of chat and apps.

The document will be reviewed frequently by the MS Teams Adoption team, with a revised version published after each review. To that end, all users are highly encouraged to share their MS Teams experiences via the MS Teams Feedback channel on the [GW Information Technology team](#).

Teams

- Starting with a project-based team is a great way to experience MS Teams without disrupting existing workflows.
- Spend some time thinking about the purpose of the team you are creating. When you create the team, add this in the description field for team members to see.
- Before creating a team, think about the goal, project, or work items and who in the organization can help deliver it collaboratively. Also, check to see if there is an existing team that can be used, which might require simply creating a channel for the intended work.
- Encouraging team members to set up MS Teams on their mobile devices will ensure they don't miss a thing. Microsoft Teams is available as a desktop app and as a mobile app for iOS and Android.
- Regularly review team membership to keep the scope of data shared within the team to the appropriate viewers.
- Because membership can change over time, it's a good idea to designate at least two owners for each team.
- Keeping the staging to a minimum allows users to organically create channels, customize tabs, and add connectors as needed. You can always take away the ability for team members to do any of these things.

- If your team isn't taking off the way you want, use @team and @channel to get everybody's attention.

Channels

- Create channels to focus discussions
- Channels within a team should be thought of as topics or workstreams to aid the team in organizing their work to deliver on their joint objectives. Each team should craft channels based on their work, priorities, and style
- Create initial channels so people know where to contribute and to find existing conversations.
- Use descriptive channel names, to make it easy for people to know where to go for each conversation.
- In addition to the default "General" channel, you can create some additional channels for team members to see (e.g., "Fun" for "water cooler" conversations and for team deliverables). However, be thoughtful about how you organize your content, creating only channels that are absolutely needed for collaboration and content sharing.
- Be personally active in channels.
- Stay productive with pinned channels! Pinned channels stay at the top of the list so you don't have to hunt them down.
- Post topics and themes that lead to active discussions with input from a variety of people.
- You might want to use a private channel if you want to limit collaboration to those who have a need to know or if you want to facilitate communication between a group of people assigned to a specific project, without having to create an additional team to manage.
- Upload relevant files and documents to each channel for easy access to important content.
- Encourage your team members to turn on channel notifications so that they are notified when a new message is posted to a channel.
- Forward emails to a channel to continue discussions in MS Teams.
- Pin relevant apps used by the team—Excel, Planner—or pin critical files, or websites.

- Team owners and team members (if the feature is enabled for them) can manually create and assign tags to people. Once a tag is added, just @mention it in a channel. Everyone who has been assigned that tag will receive a notification just as they would if they were @mentioned individually.

Chat

- Chat privately one-on-one or have instant group conversations.
- Try only using chat rather than email for short, conversational messages like “Can we postpone tomorrow’s meeting?”
- If you only want to talk to one person or a small group, use the Chat feature.