3 ways to make your team fall in love with Microsoft Teams

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The challenges of Microsoft Teams adoption

Over the past year or two, the pandemic has changed nearly everything about the way we work, from where we do it, to how we communicate with our colleagues and customers. As part of that transformation, many organizations have turned to Microsoft Teams as a way to stay connected across various homes, offices, and time zones.

But change is hard. Navigating new tools is hard. Many teams already have established workflows in email or other tools, and the idea of shaking up their existing processes is daunting. With that kind of large scale migration comes hesitancy, resistance, and frustration.

Often admins find themselves in a chicken versus the egg dilemma: without frequent use and exploration, most users don't even realize the breadth of features and capabilities beyond basic chat and video calls, but without realizing the broad range of use cases Teams offers, most people are reluctant to log into it with any real regularity.

Whether you're a Microsoft Teams admin, or an operational leader, driving organization-wide adoption is no small feat. That's why we put together this simple guide to help you set your team up for success and overcome common objections and obstacles.

In this paper we'll share helpful resources and advice on:

- Migrating from common platforms like email or Slack

- Simple use cases to get started with

- How to use apps to create intuitive Teams workflows

- Permissions, security, and admin settings to make your team successful

- Emoji Ops and other cultural practices you can implement

# 3 ways to make your team fall in love with Microsoft Teams

#1

Bridge the gap between tools
by focusing on the basics

There are endless ways to use Microsoft Teams – so where exactly should you start?

Rather than overwhelming your team with complex workflows and customizations, meet them where they're already at. Every employee likely has a previous point of reference for communication tools, whether it's the system your organization migrated from, or something they used at a previous job.

Drawing parallels between capabilities in Teams and other common platforms makes it easier to get your users up to speed on the basic anatomy, and helps them understand how they might best use it.
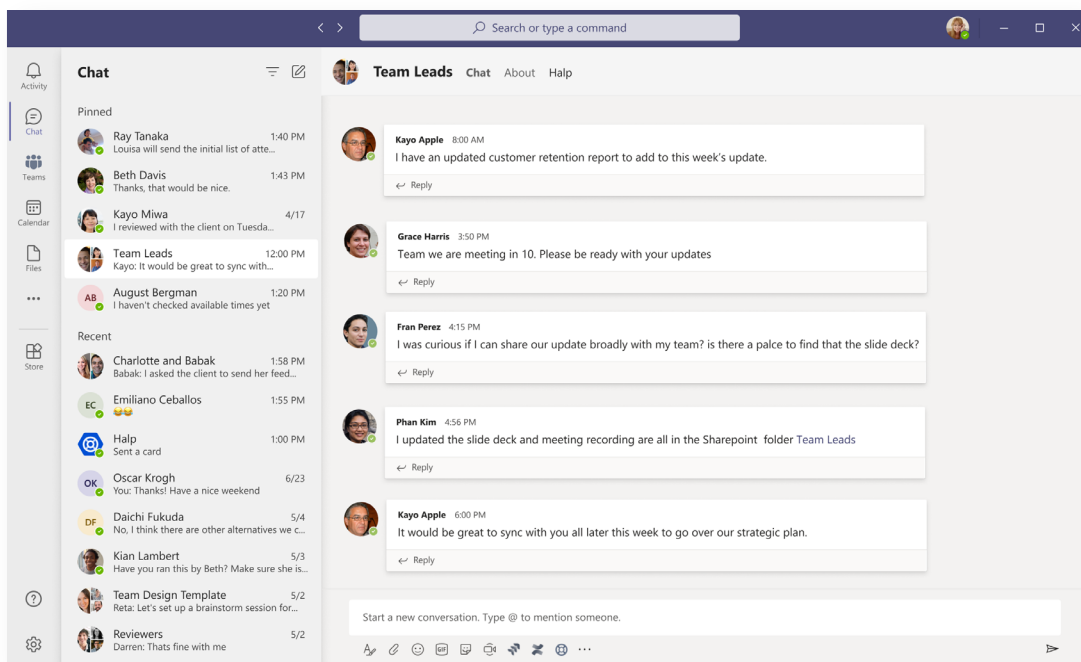
Objection handling for old ways of working

In the early days of a migration, you're likely to hear a lot of complaints and objections, citing preferences for your previous tools. Below are a few responses you can use and customize to debunk common concerns and better educate your users on the basics of MS Teams.

⚠️ **OBJECTION** "I prefer chatting in Slack."

✅ **RESPONSE** There are many direct parallels between the two tools, and even more features that you might have been missing in Slack.

Direct messages and threads work quite similarly, and you can even still use emoji reactions to respond to messages. Teams also offers channels, but as a bonus, they are grouped under overarching Teams, which makes it easier to locate the channel you're looking for and to manage access for certain members.

Another example of difference, whereas Slack users join channels within a Slack Workspace, Microsoft Teams users join a team which can have multiple channels. Knowing this will allow you to restructure things and regroup users and projects or channels differently.

Tabs and full page apps supercharge the benefits, going beyond typical chat functions to enable full blown productivity and business applications with a native Teams experience.

⚠️ **OBJECTION** "Slack integrates with all the tools I like to use."

✅ **RESPONSE** Not only does Microsoft Teams offer powerful integrations of its own, but it has many native, out-of-the-box features that can take the place of some of your typical 3rd party tools.

For example, no more creating separate zoom links to do a quick sync. Video meetings inside of Teams are a click away, and any notes or chats sent during the meeting are automatically saved within a group chat for the meeting participants – no need to do a separate writeup after the call to summarize action items and decisions. Everything from the meeting seamlessly transitions over to async conversations within Teams.

⚠️ **OBJECTION** "I've been using email for years and I'm used to it."

✅ **HOW TO RESPOND** Microsoft Teams works a lot like emails, just faster, and with more options to customize your experience! Each new conversation in Teams is like a new email thread. Chat DMs are just like direct, one-on-one emails, and Chat Groups are like emails with multiple people on copy.

You still have all the same features that you enjoy in email, like rich text editing for bolding, bulleting, etc., as well as the ability to reply and add attachments, links, and other supporting materials. Just like in email where new activity or responses pop messages to the top of your inbox, Teams conversations with new messages will jump to the bottom of the Channel so you don't miss a beat.

As a bonus, Teams allows you to seamlessly transition to audio or video calls when a conversation is time sensitive, or requires a lot of back and forth.

Microsoft Teams Translation Guide

Microsoft Teams	slack	Email
Conversations	Message	Email
Replies	Threads	Threads
Group Chat	Group DM	Email with cc
Channels	Channels	Email with cc
Team	Channel / Group DM	Group email alias
Apps	Apps	Add on tools
Tabs	--	--

⚠️ **OBJECTION** "Email makes it easy to communicate broadly with my teams using aliases."

✅ **HOW TO RESPOND** Teams actually operates similarly to preset company Email Group Aliases. If you previously had an email alias to contact your entire org, you can create a Team with channels for different topics of conversation. For example, an HR Team can have channels related to benefits, compensation, company policies, and more. Having channels allows you to loop in new team members or stakeholders to conversations with a searchable record of historical context – no more forwarding long, messy email threads to get them up to speed. Powerful search functionality makes it easy to find topics and conversations with simple keywords.

⚠️ **OBJECTION** "I like how email allows me to thread conversations and see historical context."
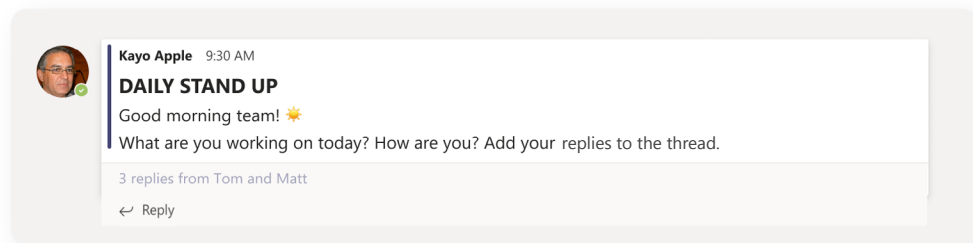
✅ **HOW TO RESPOND** Microsoft Teams also allows you to thread conversations, but makes it much easier to follow. Its clean, compact interface allows for easy perusal to catch-up on missed messages or reference old conversations. Every email user has wasted time scrolling through long, awkwardly formatted email chains trying to find the needle in the haystack. Then spend 20 minutes composing a thoughtful reply, only to have a new email ping in that thread before you've even hit send.

By taking a conversational approach to workplace communication, Teams eliminates the time-consuming and clunky nature of traditional email threads and instead allows you to communicate:

- **Informally:** Spend less time formalizing your message and stressing over getting every sentence perfect.

- **Quickly:** No more waiting around for a response. Chat in real time, and even see when someone is typing a response.

- **Clearly:** No more overwhelming walls of text that lead to missed details and lost context. Bite-sized replies allow you to tease out an idea or understand a request more naturally and organically.

5 simple use cases to get your team started

1 **Connect for daily standups**
Teams offers an easy place to check in on daily or weekly priorities and provide visibility to relevant managers and stakeholders.

2 **Share company announcements**
Using Global or Team channels, you can share company news, daily announcements, and reminders.

Kayo Apple 9:30 AM
DAILY STAND UP
Good morning team! 🌟
What are you working on today? How are you? Add your replies to the thread.

3 replies from Tom and Matt

↩ Reply

Pro tip: Add in a simple automation to prompt your daily standup. **Learn more.**

3 **Manage your schedule**
The calendar tab on the left-hand tool bar makes it easy to keep track of your next meeting and schedule new events – all without having to switch between tools.
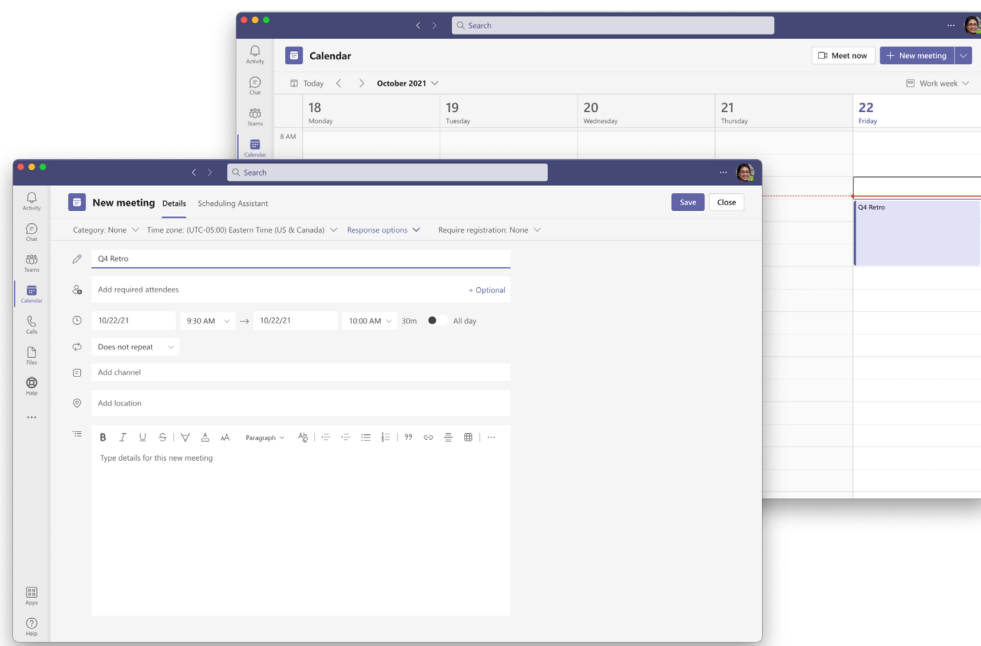
4 **Browse and share files**
Teams seamlessly connects to your favorite cloud storage accounts for fast file sharing. It also captures any files shared by teammates in chats and channels and centralizes them in one place for easy future reference.

5 **Hold your weekly 1:1s**
Connect with your managers or direct reports for your weekly 1:1 using the "Calls" tab on the left-hand toolbar.
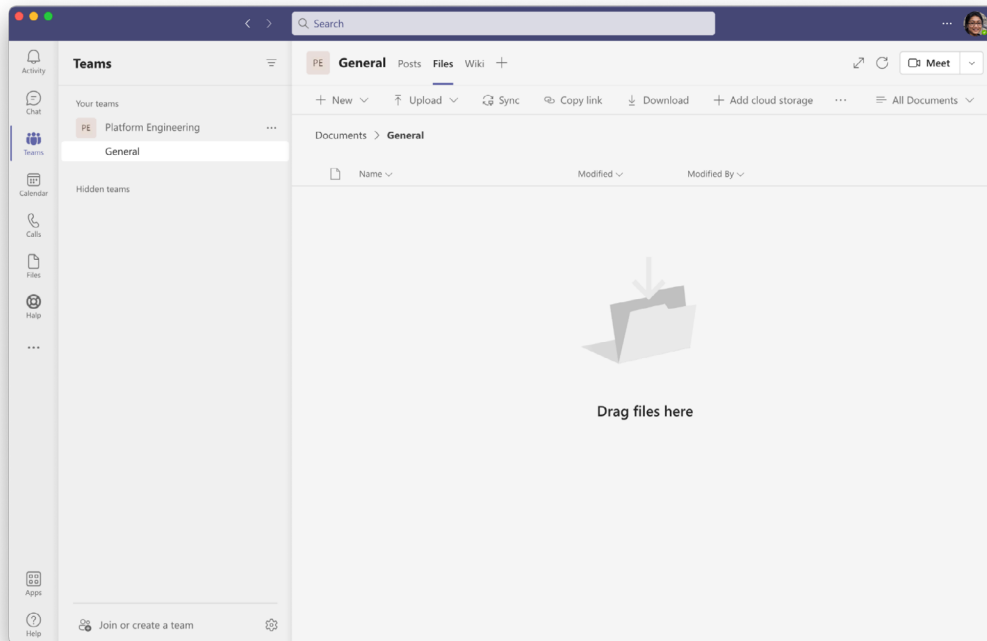
HELPFUL RESOURCES

Looking for a deeper dive on the basic features of Microsoft Teams? There are plenty of great Microsoft and partner resources available to help your team bone up on the basics. Here we've compiled a couple of our favorites:

- **Microsoft Teams Docs**

- **Halp 101 community blog**

#2

Connect Teams to the tools you use every day

Some of the most powerful Microsoft Teams workflows stem from the tools your team already knows and loves. By using the broad selection of business and technology apps found in Microsoft AppSource, you can empower your team with familiar interfaces and workflows to help them better adjust to a new platform, as well as introduce new apps that supercharge the Teams experience.

Make the most of tabs, message actions, and commands

When installing an app to Microsoft Teams, there are many ways to weave it into your workflow or make it visible in your workspace:

- **Tabs**: These can show up in two places: apps with a personal experience appear on the left-hand toolbar; Team tabs appear at the top of a channel or chat and allow easy access to the files, apps, and information your team needs most.

- **Message Actions:** These allow users to take app-related actions using buttons and forms in various places throughout Microsoft Teams.

- **Bot Commands:** Chat bots let you trigger automations and quick actions via chat.

10 POPULAR APPSOURCE APPS YOUR TEAM PROBABLY ALREADY KNOWS

Polly   Heytaco   box   YouTube

zoom   salesforce   miro

Adobe Creative Cloud™   GIPHY   workday.

# Four Atlassian apps with a powerful Microsoft Teams experience

⊕ Halp

A conversational ticketing solution for IT and business operations teams to capture, track, and resolve requests directly in their preferred communication platform. Halp was purpose-built for Teams users.

Top MS Teams uses:

- Turn interruptive, scattered DMs into trackable tasks and tickets

- Run your help desk in Microsoft Teams from end to end and eliminate context switching

- Make requests visible, reportable, and collaborative

Our favorite MS Teams features:

- Message actions turn chats into trackable tickets

- Teams Tab for quick visibility into recent requests

- Quick actions for managing, assigning, and resolving tickets

- Personal bot for alerts

- Team bot for collaborating on tickets
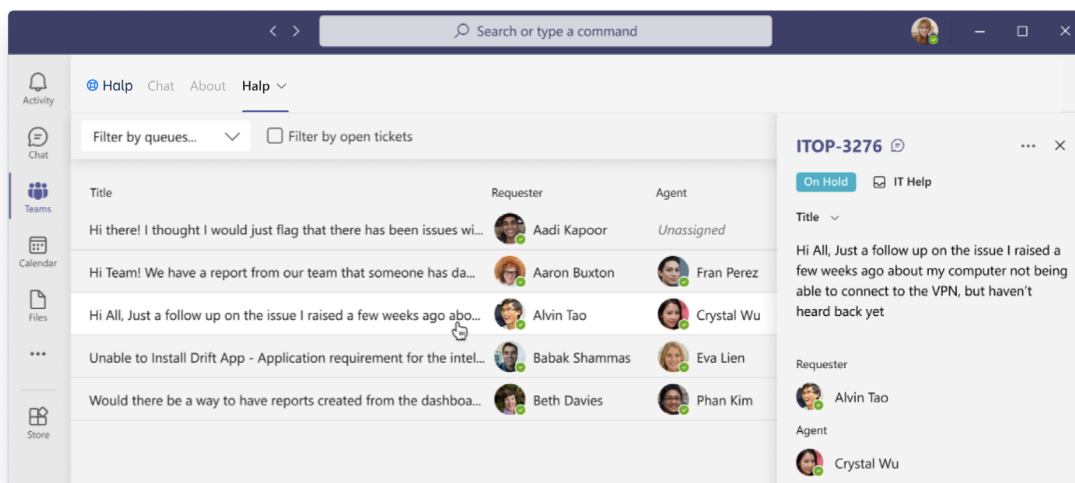
> **Pro tip:** Join Halp's **weekly Microsoft Teams webinar** to see the powerful combo of Halp and Teams in action!

Jira Cloud for Microsoft Teams anchors real-time communication to a single, shared view of the work ahead. With the power of two tools in one view, conversations have instant clarity and context, creating better alignment and shorter delivery time.

Features we ❤️:

- **Message actions:** Convert a Teams chat message to a new Jira issue or add a comment to an existing Jira issue in just a few clicks.

- **Team tab:** Create a central view of existing issues and edit them or create new ones directly in Teams.

- **Meeting panel:** Visualize your Jira tickets in a Teams meeting in the side panel and prioritize and update with meeting attendees.
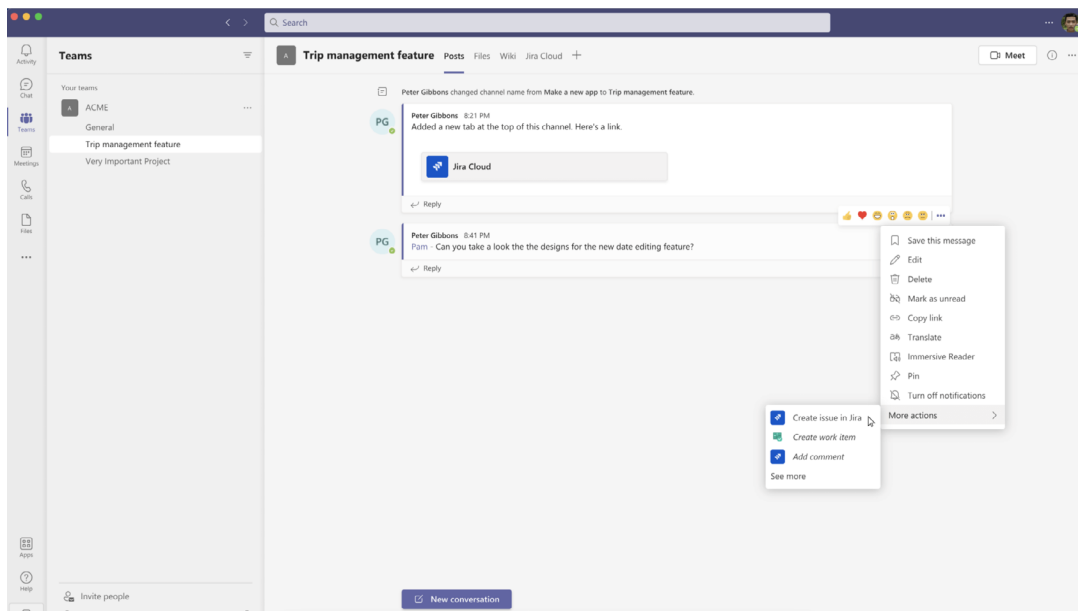
Confluence

Collaborative in-meeting notes, flexible page organization, and powerful search directly in Microsoft Teams.

Top MS Teams uses:

- Capture shared meeting notes for easy collaboration

- Create, edit, and publish to any Confluence space from Teams

- Use Confluence macros to make notes more digestible and action-oriented with action items, decisions, code snippets, mentions, tables, and more.

Our favorite MS Teams features:

- Confluence page Tabs for easy access and editing

- Teams chat messaging extension to search and share Confluence pages

- Meeting panel for real-time note capture & post-meeting adaptive card to review shared notes

- Personal Tab for bookmarking private notes & to-do lists

Trello

A Kanban style board for free-form project management and collaboration.

Top MS Teams uses:

- Collect ideas and tasks and turn them into Trello cards

- Bookmark frequently used boards and projects for easy reference in conversation

- Collaborate on and update Trello projects directly from Teams

Our favorite MS Teams features:

- Personal Tab for updating cards and tracking to do lists

- Team Tab for easy Trello project access and editing

- Messaging extension to search for Trello cards in conversation

To learn more about how to use your favorite Atlassian tools like Halp, Confluence, Trello, and Jira in Microsoft Teams, visit **atlassian.com/software/marketplace/microsoft**

#3

**Configure your workspace with team culture in mind**

The best way to ensure stickiness with a tool like Microsoft Teams is by setting clear expectations and tailoring best practices to your team's unique way of working. By aligning your Teams' use with your organization's existing culture and values, adoption becomes more intuitive.

Establish rituals and settings that promote communication

Many organizations want their employees to shift any and all communication into Microsoft Teams, but discover early that members often don't even open Teams on a regular basis. If the expectation is that your users are logging into Teams daily, then give them more reasons to be there!

For example, to encourage users to open Teams first thing, try setting up a Global channel for morning announcements. Allow the company to engage with the announcements, comment in threads, use emojis, gifs, etc. to promote this new, less formal mode of remote communication.
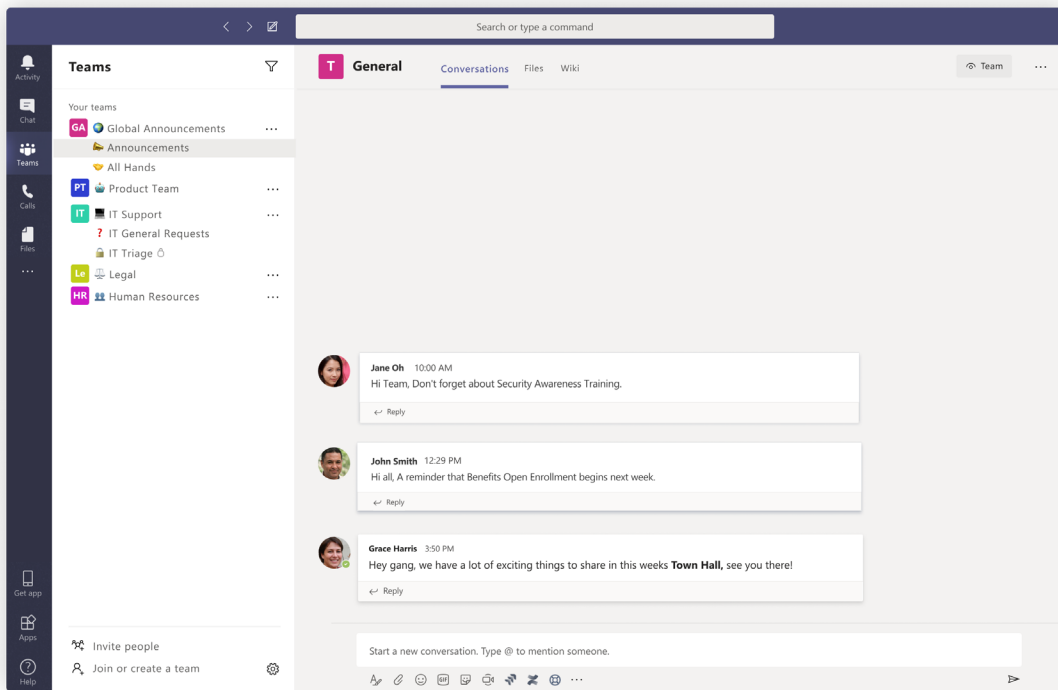
You can even try gamifying the experience by asking a trivia question exclusively in Teams and offering prizes to the first people to get the answer correct. If a big part of your team's culture is having monthly game nights to bond, instead of setting up on a different virtual platform, you can use the Teams video function or an app from AppSource to host your next get-together. Find simple, low-stakes ways to set the tone for communicating.

> **Pro tip:** Try sharing a weekly Teams fun tip or quick tutorial video in your global channel to encourage deeper adoption, like how to use emojis and gifs for reactions, how to start a video call, how to view shared files, etc.

Get teams off on the right foot by pre-arranging Teams, Channels, and Apps for your users. Take cues from previous email aliases and team structures. Having pre-established Teams based on your companies org chart offers your employees intimate "safe spaces" where members are more likely to engage amongst the colleagues they work with most closely.

Some tips to follow:

- Keep most Teams small, 5-20 people maximum. Anything above 30 and it becomes more of an "announcement" Channel than a place for collaboration and day-to-day work.

- Don't create too many Channels per Team in advance – this leads to confusion early on. Define basic Channels and allow the team to customize from there.

- Always include descriptions where prompted.

> **Bonus privacy tip:** Did you know you can create Private Teams and Channels? Encourage an open culture in Teams while keeping sensitive information private. Give this a try for leadership, HR, or Legal teams!

EMOJIOPS

Emojis have become one of the hallmarks of modern communication – both personally and professionally. Many teams have used their chat tool as a way to implement something called EmojiOps, which helps declutter messages and eliminate distractions by using emojis to trigger operational processes and communicate approvals or needs. Here are some simple ways your team can experiment with EmojiOps:

Message urgency

- 🔴 Urgent, something is really broken.

- 🟡 Blocking someone's work or needs response to a customer.

- 🔵 Not urgent or blocking anything, get to it when you can.

Acknowledgement

👍 Confirmed / Approved / Agreed

Interested in learning more about EmojiOps? Check out **this webinar** on MS Teams productivity tips.

Pre-configure your space to your team's needs

In addition to configuring your Teams use around social, team, and cultural practices, you can also set up the app experience in advance to give your employees a seamless out-of-the-box experience.
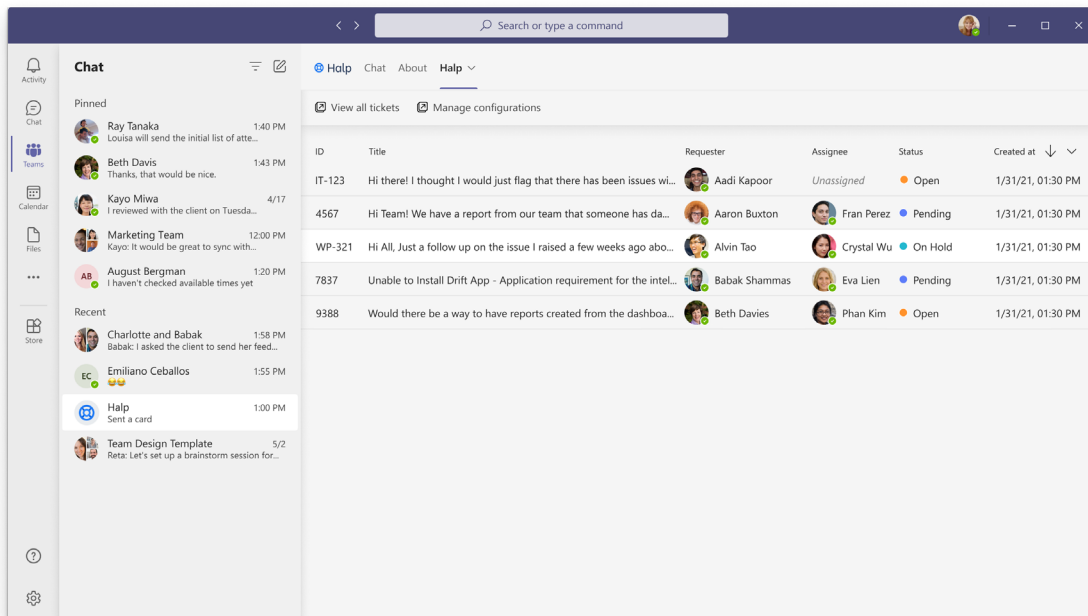
Beginner Settings

- **App Setup Policies:** Set an app policy to auto-install and pin recommended apps that your company uses, like a preferred video conferencing app, or a ticketing tool. This gives everyone an easy way to find their favorite tools without having to get caught up in complicated app installation processes.

Advanced Settings

- **App Upload Policies:** Use app permission policies to gradually roll out new third-party or custom built apps to specific users and simplify the user experience, especially when you start rolling out Teams across your organization.

Bonus security tip: Did you know you can manage permissions around apps that employees can install to give you more control over security? Control what apps are available to specific users in your organization, and allow or block all apps or specific apps published by Microsoft, third-parties, and your organization. These settings are great for proactively protecting against compliance violations and breaches.

Document anything & everything

Whatever your team's Microsoft Teams processes and rituals might be – document them. Having a source of truth for what behaviors are expected of everyone, and, more importantly, guidance on how to do those things, can go a long way in driving adoption. This can include any of the things mentioned above, but can also include etiquette, expected channel naming conventions, approval processes, in-depth training materials, and more.
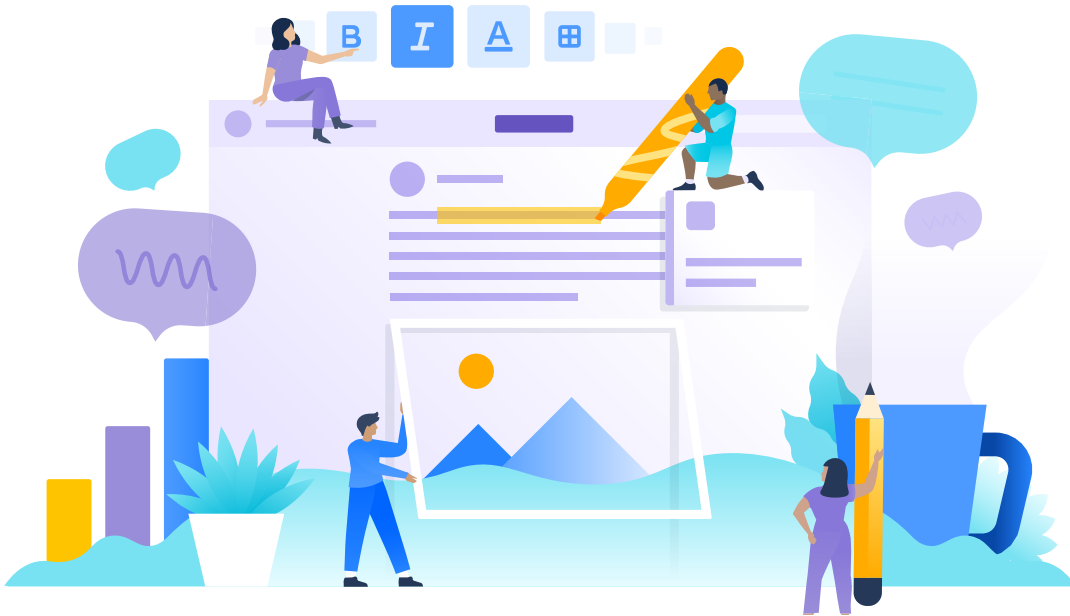
Pro tip: Confluence is a great place to document your policies and then integrate with your Teams instance for easy access!

Microsoft Teams checklist for success

Although changing your team's fundamental communication patterns can be challenging, with the right steps and rituals, you can ease your employees into a whole new way of working. Microsoft Teams offers such a broad range of features and capabilities, there is something for everyone on your team to love. Below is a short checklist of must-dos to help get you and your team started:

- [ ] Share 101-level reference materials to begin familiarizing your team with the basics.

- [ ] Set up a Global channel for daily news and important company announcements and assign someone to own updates in this channel.

- [ ] Set up some initial Team channels based on org charts. Work with Team leads and managers on this to ensure they are familiar with it and can encourage adoption.

- [ ] Work with leadership and sensitive teams to set up Private Teams for them to work in.

- [ ] Pre-install & Pin a few apps via App Policies. Be sure to share documentation and walkthrough videos with everyone so they can learn how to best use them!

About Atlassian & Halp

Atlassian unleashes the potential of every team. Our team collaboration and productivity software helps teams organize, discuss, and complete shared work. Teams at hundreds of thousands of large and small organizations – including Bank of America, Redfin, NASA, Verizon, and Dropbox – use Atlassian's project tracking, content creation and sharing, and service management products to work better together and deliver quality results on time. Learn more about our products, including Jira Software, Confluence, Jira Service Management, Trello, Bitbucket, and Jira Align at **atlassian.com.**

Halp, acquired by Atlassian in May 2020, is a conversational ticketing solution for modern teams. Capture, prioritize, track, route, and report on employee and customer requests directly from Slack or Microsoft Teams. Halp is used every day by teams like GitHub, Delivery Hero, and Peloton to manage tickets across business and IT teams like HR, Sales Ops, Legal, Incident Management and more.

Want to learn more?

Schedule a demo to see Halp in action.

ATLASSIAN