

ROADMAP TO MASTERING MODERN MEETINGS IN MICROSOFT TEAMS

They say life is about the journey and not the destination – the same is true for modern meetings and remote team communication. The roadmap below will guide you in your journey using **Microsoft Teams** for easy, accessible & collaborative modern meetings.

01 SCHEDULING YOUR MEETING

Open up Teams and schedule meetings in the "calendar" tab. Set the date/time, add participants or **entire channels** and schedule!

TIP! You can also schedule Teams meetings right from your **Outlook** calendar if your organization has that feature enabled!

You can track who accepted/declined within the meeting itself, and it will stay safe and sound in your calendar until it's time to meet.

What if you need to meet right away? No problem! Just click the "call" icon in any chat, group or Teams channel, and you will call people directly for the perfect modern ad-hoc meeting! You can choose to have a **video conference**, **phone call**, or **share your screen** OR – ALL OF THE ABOVE.



02 PREPARING FOR YOUR MEETING

Be ready to join the meeting **on-time**, and with everything **prepared**. Modern meetings are nothing if not highly efficient! Choose a **quiet place** for the meeting and **mute** your other applications and devices so there are no surprise background noises.

Close any private or irrelevant windows or documents if you plan to share your main screen. If you are using a new computer, headset, or device, test the audio input and quality in the settings tab – **"make a test call"**.

03 JOINING YOUR MEETING

Have your **camera** turned on so that you can have a "face-to-face" conversation.

TIP! Use background blur if you would like to keep the focus on you, instead of the great artwork or distractions behind you!

If you would like to save the meeting, don't forget to hit "record" when the meeting starts!

04 DURING YOUR MEETING

Make use of the many tools available to augment your modern meeting, like **Meeting Notes**, **screen sharing**, and **chat**. Don't forget to mute your line if you are listening in or want to limit any potential background noise coming from you.

Encourage others to share their screens if they need to present. They will be able to share **specific documents/files** or their **entire screen**! The virtual **whiteboard** in Teams is particularly helpful for collaborative planning!

Coming soon! Microsoft is always building out Teams. Keep an eye open in 2020 for hand raising, background noise reduction, and other great tools and features to augment your modern meetings.



05 AFTER YOUR MEETING

You've reached your destination and had a very successful modern meeting in Teams! After you've wrapped up the meeting, be sure to access any recordings directly in **Stream**.

You will also be able to access the **speaker track**, **transcript** and **meeting notes** so that you can reference any important items outlined in your meeting.

TIP! If you pulled up Planner, OneNote, or other integrated Apps during your meeting, take a moment to update and save any important details from the meeting!

Coming soon! Keep an eye out for meeting **tasks** in Teams, which will allow you to allocate tasks and **action-items** from your Teams meetings.



Contact us to learn more about help with Teams planning, setup, integration and/or training.
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