Microsoft features

How to get the most from **Microsoft Teams**

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It's Monday morning. You're trying to get a quick answer from someone in your business. But they're working from home today... and your email is sitting in their inbox, unread.

Meanwhile, you're digging through old email threads to find the latest version of a file. Only to realize someone else has already updated it, and it's sat in a folder on their laptop. You can't access it.

Frustrating, isn't it?

That's exactly the kind of chaos Microsoft Teams was built to fix.

You'd be forgiven for thinking it's just a video calling tool. Or maybe you've used it to send the odd message.

But here's the truth: ***Microsoft Teams is much more than just a chat app or Zoom alternative.***

It's a powerful communication and collaboration tool that will:

- Save your business time
- Help your people work better together, and
- Make everyday tasks simpler

Whether you have employees in the office, working remotely, or spread across different locations, Teams brings everyone together in one secure, easy-to-use place.

You can chat in real time, hold video meetings, share and edit files, manage tasks, and stay on top of everything. All without switching between different tools or drowning in emails.

And the best part?

You don't need to be tech-savvy to get the most out of it.

What is Microsoft Teams? **(and why does your business need it?)**

Microsoft Teams is your all-in-one hub for communication and teamwork. It's part of Microsoft 365 and it's designed to help your people stay connected and get things done.

Instead of juggling emails, phone calls, Zoom meetings, shared drives, and sticky notes, imagine having just one place to:

- **Chat with your employees**
- **Hold video meetings**
- **Share and edit files together**
- **Keep track of tasks and projects**

That's what Microsoft Teams does. And once you've got it set up, you'll wonder how you ever worked without it.

From email overload to real-time conversations

In many businesses, email is still the go-to tool for everything. But it's far from perfect. Long threads, missing attachments, delayed responses. It can be a slow and confusing way to communicate.

Teams takes a different approach. It's built around real-time messaging. Like texting, but for work.

You can ask a quick question, share an update, or send a document instantly. Everyone sees the message straight away and can reply in seconds. It speeds things up and cuts out a lot of unnecessary emails.

Everything in one place

One of the biggest strengths of Microsoft Teams is that it brings all your communication and files together in one secure place.

Need to hop on a quick video call? You can do it directly inside Teams.

Want to work on a Word document with a colleague? Open it right in the chat and edit it at the same time. No need to email versions back and forth.

Trying to remember where that important file was saved? If it was shared in Teams, it's right there in the conversation history.

Teams also links up with tools you might already use, like Outlook, Excel, and PowerPoint. Everything feels familiar, and you don't need to learn a whole new system.

Teams, Channels, and Chats: **What's the difference?**

When you first open Microsoft Teams, it can feel a bit overwhelming.

You're faced with something called "Teams", then "Channels", and there's also "Chat". But what's the difference? And when should you use each one?

Understanding Teams

Think of a "Team" in Microsoft Teams as a group space for people who are working together regularly. That might be your whole business, or just a specific department like sales or finance.

Each team has its own digital workspace where people can talk, share files, hold meetings, and stay up to date.

For example, you might have one team for the whole company, and then smaller, more focused teams for specific projects or departments. The idea is to give people a shared space where everything related to their work is easy to find and talk about.

What Channels are for

Inside each team, you can create different "Channels". These are like topic areas that keep discussions organized. So instead of having one long, messy thread of conversation, you split things up by subject.

Let's say you've created a team for your marketing department. Within that, you might have channels for things like social media, events, or email campaigns. That way, when someone posts an update or a question, it's in the right place. And everyone can find it again later without hunting through unrelated messages.

Channels also make collaboration easier. Each one has its own conversation area, file storage, and even its own meeting space. Everything stays tidy and focused.

How Chat fits in

Chat works a bit differently. This is more like sending a text message or a direct message on social media. It's for those quick, informal conversations. Maybe a one-to-one with a colleague, or a small group chat with two or three people.

You might use chat to ask a quick question, check in on a task, or share something that doesn't need to go into a formal team channel.

The big difference is that chat conversations are private. Only the people in that chat can see them.

So, if it's something important that others might need to refer to, like a file or a group decision, it's better to post it in a channel where everyone can see it.

How it all works together

Let's imagine your business is launching a new product. You could set up a dedicated team for the project, then create separate channels for planning, marketing, and logistics.

This gives everyone a clear place to work and keeps the conversation flowing in an organized way.

But if you just need to quickly check in with someone about an idea, you might send them a private chat instead.

Meetings that work

Let's be honest, business meetings don't always go smoothly.

Sometimes people can't find the right link. Someone's camera doesn't work. Files are missing. And by the time everyone's joined and figured out what's going on, half the meeting time has already been wasted.

Microsoft Teams takes away a lot of that pain.

It's designed to make meetings easier to organize, simpler to join, and more productive overall. Whether you're meeting one-to-one or with a group spread across different locations, it gives you everything you need in one place.

With Teams, you can schedule a meeting straight from your Outlook calendar, or directly within the Teams app itself. When it's time to join, you just click the link. That's it. No special codes, no extra apps, no last-minute scrambles.

If someone's running late or can't make it, they can catch up later. Teams gives you the option to record meetings (with permission), and it can even generate a written transcript. That way, no one misses out on key points, and you can go back and check exactly what was said.

During a Teams meeting, you're not just limited to talking. You can share your screen, show a PowerPoint, open a shared document, or even work on a file together in real time. It turns a basic video call into something much more useful.

Let's say you're reviewing a proposal with a client. Instead of emailing them a PDF and hoping they've read it, you can share your screen and walk them through it live. Or if your people are brainstorming ideas, you can open a shared document and start writing together.

It's all smooth, fast, and in one window. You're not constantly switching between tabs or tools.

Another benefit is how Teams keeps all the meeting details tidy and accessible. You can add an agenda to your invite, take notes during the meeting, assign follow-up actions, and store everything in the same space where the meeting took place.

And because meetings are linked to specific teams and channels, the right people are always included. Everyone sees the context, can add comments before the meeting, and can review the results afterwards. All without needing a separate email chain.

The result?

Meetings that run smoothly, stay on track, and don't eat into everyone's day. You spend less time setting them up, and more time getting things done.

Smarter file sharing and collaboration

If you've ever emailed a file to someone... waited for them to make changes... and then tried to figure out which version is the most up to date, you'll know how frustrating it can be. It's a common headache in many businesses.

Microsoft Teams offers a much smarter way to share and work on files together. Without all the confusion.

Work together, even when you're apart

One of the most powerful features in Teams is real-time editing. That means two, three, even ten people can open a Word document, Excel spreadsheet, or PowerPoint presentation at the same time and work on it together.

When you share a file everyone opens the same version. Not a copy. Not a separate attachment. The actual file, stored securely in the cloud and always up to date.

You see changes as they happen. You can leave comments. You can discuss edits in the chat beside the file. It's like sitting next to each other in the same room, even if you're miles apart.

That also means no more endless versions with names like "Final_Final2_ReallyFinal.docx." You can see who last edited the file, when they did it, and even go back to earlier versions if needed.

And because the file stays in Teams (and is backed by Microsoft's cloud service, OneDrive), it won't get lost in someone's inbox or desktop folders. It's always there when you need it.

Files stay where the conversation happens

Let's say someone shares a new pricing spreadsheet in a chat. You open it, review it, and send back a few thoughts. That file and the full conversation are now saved in the chat thread, ready to come back to later.

Or maybe your sales department is working in a dedicated Teams channel. They can share files related to leads, quotes, and proposals right there. No more digging through emails or hunting through shared drives. Everything stays connected.

Easy to use, easy to trust

If you're worried this all sounds too technical, don't be. Opening and editing files in Teams feels just like using Word or Excel. Because it is.

You can edit directly in Teams or click a button to open the file in your desktop app if you prefer.

And because everything is saved automatically, there's no need to hit "Save" or worry about losing your work if your laptop battery dies.

Great!

Boosting productivity **with built-in apps**

Microsoft Teams isn't just about messaging and meetings. It also includes a bunch of helpful tools that can save time, keep work moving, and make your business run more smoothly. All without needing to switch between lots of different apps.

These tools are built right into Teams. Once you know where to find them, they're easy to use and incredibly handy.

Let's start with something every business needs: Keeping track of what needs doing.

In Teams, you'll find a simple task management tool called **Planner.** It's a way to create to-do lists for yourself or for your people.

You can assign tasks to people, add deadlines, tick things off as they get done, and see progress at a glance. It's perfect for managing small projects, shared workloads, or even just your own daily list of jobs.

And because it's part of Teams, you can talk about the task and work on it in the same place.

Need to get something signed off? A price, a quote, some vacation time? Instead of sending emails back and forth, you can use the **Approvals** app inside Teams.

It lets you create a quick approval request, send it to the right person, and get a clear yes or no, without delays or confusion.

It keeps a record too, so you've always got a paper trail if you need to refer back to it later.

Sometimes you just need a quick answer from people. Should we do A or B? What time suits everyone for a meeting?

With **Forms** and **Polls** inside Teams, you can ask a question and see the results in real time. It's much faster than chasing replies by email, and everyone sees the outcome straight away.

This is great for getting feedback, making group decisions, or even checking how your people are feeling about something new.

And one of the best things about Teams is how well it plays with others.

You can bring in tools your business is already using. Like **OneNote** for notes, **SharePoint** for document storage, or even third-party apps like **Trello, Zoom,** or **HubSpot.**

These tools can be added as tabs inside a team or channel, so your staff don't have to keep switching between different websites or systems.

It keeps everything connected and saves time, especially when you're juggling a lot of different tools.

These built-in apps help you move faster, stay organized, and reduce the admin that can slow down your day. Best of all, they're easy to learn and built to support the way real businesses work.

Remote doesn't have to mean disconnected

These days, it's normal for people to work from different places. Some might be in the office. Others at home. Some might be out visiting clients or traveling between sites.

The challenge?

Making sure everyone still feels like part of the company.

That's where Microsoft Teams really shines. It helps your people stay connected, work together, and keep the culture of your business strong.

Stay in touch with chat and video

One of the simplest but most powerful features in Teams is real-time chat. It's quicker than email and more personal too. You can send a message, get a reply, and move on.

It's perfect for quick check-ins, sharing ideas, or just saying, "How was your weekend?"

And if a message turns into a longer conversation? You can start a video or voice call with just one click, right inside the chat. No need to open Zoom or make a phone call. It all happens in the same place.

See who's available (and when)

With Teams, you can also see each person's status. Whether they're available, busy, away from their desk, or in a meeting. It updates automatically based on what they're doing.

This makes remote work feel more natural. You don't have to wonder if someone's ignoring you or just not at their screen. It helps people respect each other's time, too.

You can set your own status message, like "Working on a deadline - please email if urgent", so people know how best to contact you.

Bring everyone together, wherever they are

One of the best things about Teams is how it helps create a sense of unity, even when you're apart. Whether it's a weekly department meeting, a shared channel for casual chat, or just a few emojis in a conversation, it helps people feel like they're part of something.

You can also use Teams for company-wide announcements, celebrations, and updates. It's a great way to keep everyone in the loop without flooding inboxes or missing someone out.

And yes, you can use fun features like GIFs and stickers. They're not just for laughs - they help build team spirit and make communication feel more human.

Customizing Teams for your business

Microsoft Teams is not one-size-fits-all. You can tweak and tailor it to work the way your business works.

Whether you want to keep things simple or bring in extra tools, Teams can be shaped around your needs.

Pin what matters most

If you find yourself visiting the same team or channel every day, you can "pin" it to the top of your list. That way, it's always easy to find.

You can also pin specific files or websites inside a channel, so your people can get to important documents or tools quickly.

This small change can save a surprising amount of time.

Take control of notifications

By default, Teams will try to keep you in the loop. But sometimes that means too many pop-ups or pings, especially if you're in a lot of channels.

The good news is, you're in control.

You can change your notification settings to suit how you work. Want to be alerted about @mentions but not every new message? Easy. Want to mute a noisy channel for the afternoon? You can do that too.

Getting your notifications right means fewer distractions and more focus.

Create templates for repeated work

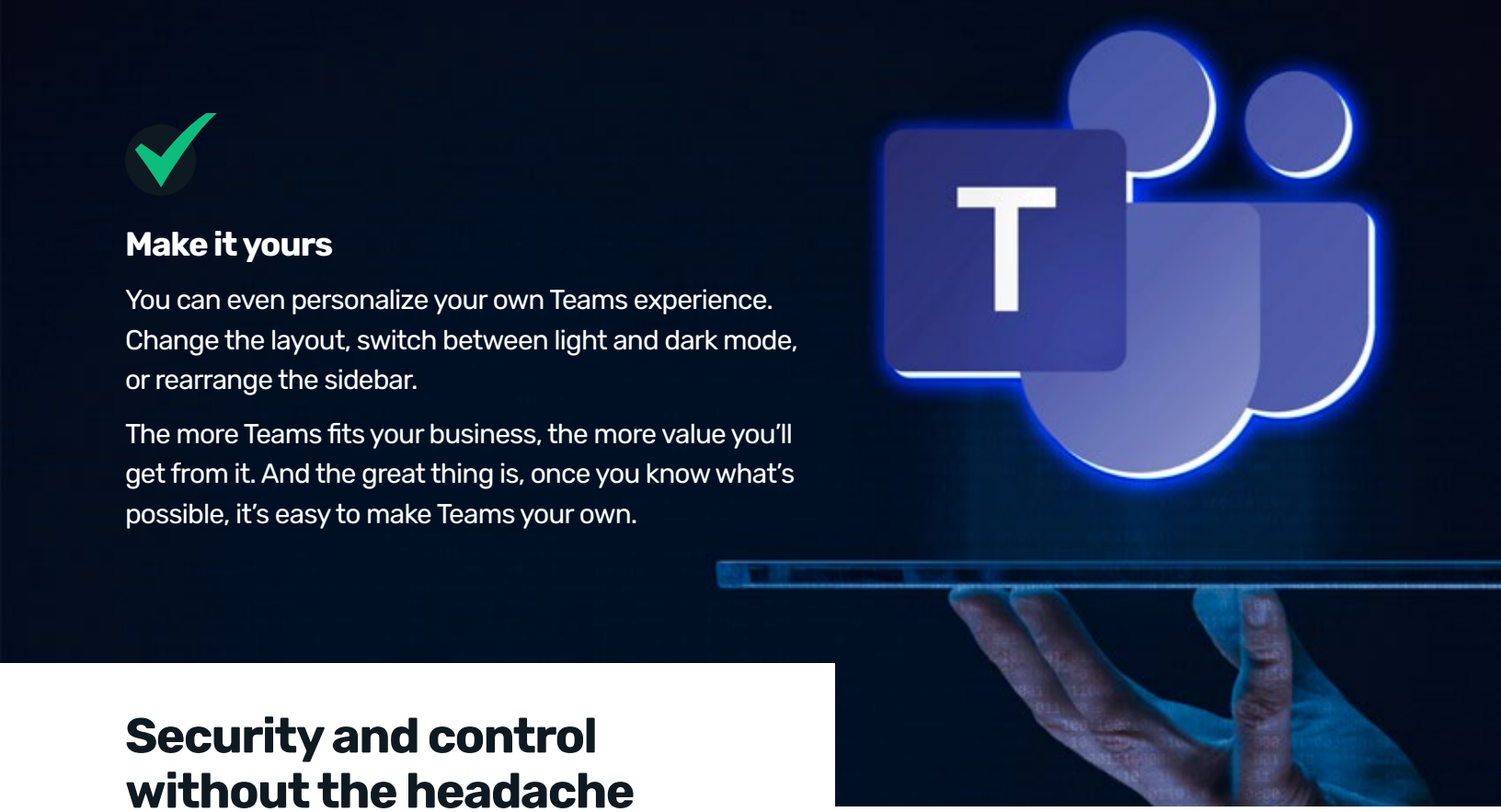
If your business runs similar projects regularly, like onboarding new clients or launching campaigns, you can create a reusable "team template."

This means your new teams and channels can be set up with the right structure, files, and tabs already in place.

Add the tools you already use

As we said earlier, Teams plays nicely with hundreds of other apps. If you already use tools like **Trello, HubSpot, Zoom, Xero**, or **Adobe Sign,** you can add them right into Teams. That way, your people can access everything from one place, without needing to jump between different websites or software.

Even better, you can add these tools as tabs inside a specific team or channel. For example, your finance department could have a tab for Xero, or your sales department could link to their CRM. It keeps everything tidy and easy to reach.



Make it yours

You can even personalize your own Teams experience. Change the layout, switch between light and dark mode, or rearrange the sidebar.

The more Teams fits your business, the more value you'll get from it. And the great thing is, once you know what's possible, it's easy to make Teams your own.

Security and control without the headache

Keeping your data safe is essential. But so is keeping things easy for your people.

With Microsoft Teams, you get both. It's built with security in mind, so your files, messages, and meetings are protected from the start. And you also get simple ways to stay in control. Especially important when people join or leave your business.

Your data is protected by design

Teams is part of Microsoft 365, which means it benefits from Microsoft's enterprise-level security. That includes things like:

- Encryption, which scrambles your data so no one else can read it
- Multi-factor authentication, extra protection when logging in, and
- Regular security updates

In plain English: It's far more secure than emailing files back and forth or using free messaging apps that weren't designed for business.

You don't need to set all this up yourself. It's already built in. But there are a few settings you might want to understand, especially as your business grows.

Managing access as people join or leave

One common problem in many businesses is that people leave but still have access to systems. That's a security risk. And an avoidable one.

With Teams, access is tied to each person's Microsoft 365 account. If someone leaves your company, you (or your IT support partner) can simply remove or deactivate their account. That cuts off their access to all Teams conversations, files, and data in one go.

You can also control what individual staff members can see and do. For example, someone in admin might not need access to HR files, or a new starter might only need to see certain channels at first. You get to choose.

What about working with people outside your business?

Sometimes you need to collaborate with people who aren't part of your company. A client, supplier, or freelancer maybe. Teams makes this possible, without opening up your whole system.

You can invite external people as "guests" to a specific team or channel. They only see what you've given them permission to see, and you can remove their access at any time.

Simple controls, big peace of mind

Most of the controls are straightforward, and if you're not sure, an IT support partner (like us) can easily help you set things up properly.

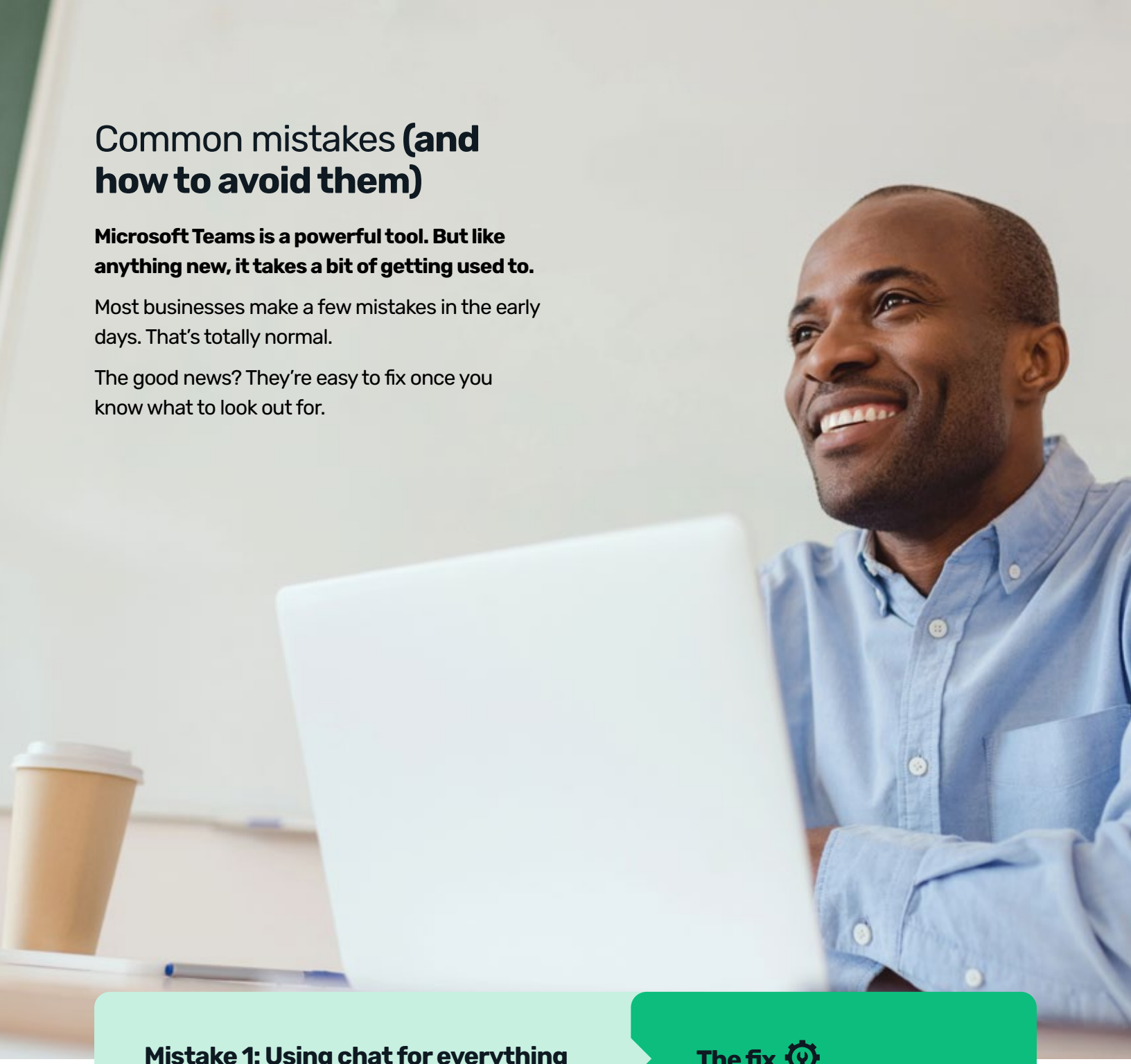
What matters is that your business stays protected, without making life harder for your people.

Common mistakes **(and how to avoid them)**

Microsoft Teams is a powerful tool. But like anything new, it takes a bit of getting used to.

Most businesses make a few mistakes in the early days. That's totally normal.

The good news? They're easy to fix once you know what to look out for.



Mistake 1: Using chat for everything

Chat is quick and convenient. But if your people use it for every single conversation, things will quickly get messy.

Important updates get lost. Files disappear into long threads. And new employees have no idea where to find past decisions.

The fix

Use channels for anything that needs to be shared with a wider group or referred to later. Keep chat for short, one-off conversations, like "Are you free for a quick call?" or "Can you send me that link?"

Mistake 2: Letting Teams grow out of control

It's easy to keep adding more teams, more channels, more tabs... until everything starts to feel cluttered.

The fix

Take a moment to plan how you want to structure your Teams setup. For example, you might have one team per department or project, with just a few well-named channels in each. Keep it simple and consistent.

And don't be afraid to archive old teams or channels when you're done with them. That way, only the most relevant stuff stays in view.

Mistake 3: Forgetting about file structure

When people keep uploading new files without thinking about where they go, it quickly becomes hard to find anything.

The fix

Encourage your people to use the Files tab in each channel, and keep files organized just like you would in a shared drive or folder. You can even create folders inside the Files tab to keep things tidy.

If you're not sure where something was saved, remember: you can always search for it using keywords in Teams.

Mistake 4: Not giving people a proper introduction

One of the biggest mistakes is assuming everyone just "gets" how to use Teams. Some people will dive in and pick it up easily, but others might feel a bit lost or unsure what's expected of them.

The fix

Take a little time to explain how you're using Teams as a business. Things like:

- When to use chat vs channels
- Where to save files
- How to tag someone in a message
- What tools or tabs you've added and why

You don't need a big training session. A short walkthrough or a few written tips can go a long way.

Your first 30 days with Teams

Now that you've got a clear picture of what Microsoft Teams can do, you might be wondering: "Where do I start?"

You don't have to do everything at once. In fact, the best approach is to start small, build confidence, and grow from there.

Here's a simple roadmap for your first 30 days with Teams, to help your business get set up and start seeing the benefits quickly.

Week 1: Get set up and explore

Start by making sure everyone has access to Microsoft Teams through their Microsoft 365 account. If you're unsure, an IT support partner (like us) can help you with that.

Next, set up one or two core teams. Perhaps one for the whole company and another for a key department like sales or operations. Inside each team, create a few basic channels for common topics like General updates, Projects, or Clients.

Then... explore. Send a few test messages. Upload a file. Try starting a chat with a colleague. This first week is about getting familiar with how everything works.

Week 2: Start using it day-to-day

Encourage your people to use Teams for normal daily communication instead of email. Post updates in channels. Share files there. Use the chat function for quick questions.

You might also schedule a couple of meetings in Teams to see how smooth it feels. Try screen sharing or live document editing if you're feeling confident.

You don't need to move your entire workflow in one go. But the more you use Teams, the more natural it will become.

Week 3: Add useful tools

Once people are comfortable, start adding features that help things run more smoothly.

You might add a task list using Planner, or create an approvals process using the Approvals app. If you use other tools like Trello or SharePoint, try adding them as tabs inside your channels.

These little changes can have a big impact on productivity.

Now's also a good time to review your notifications. Make sure everyone knows how to manage them, so they're not overwhelmed.

Week 4: Review and improve

By the end of the month, you should have a good idea of what's working. And what could be better.

Talk to your people. Ask what they like, what's confusing, and what would help them use it more. Tidy up any unused channels. Pin important content. Add a bit of structure where it's needed.

The key is to keep improving as you go. Teams isn't something you "finish", it's a tool that grows with your business.

Getting started with Microsoft Teams doesn't have to be difficult. With a bit of planning and a little patience, it can quickly become one of the most valuable tools in your business.

It saves time. It cuts down on confusion. It helps your people work better together. Whether they're across the room or across the country.

If you're ready to see how Teams can make improvements in your business, we can help you get started.

Get in touch.

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