

Microsoft Teams for Business Collaboration — Workbook

This workbook turns the course into a real, well-run Teams workspace. Work through one section per module: design and build a team-and-channel structure, set up a meeting that ends with assigned follow-ups, organize files in the SharePoint library behind the team, then add apps and automations and lock in notification and async habits that protect focus. Fill each worksheet directly as you build in Teams, run every step on a real team or a practice one, and by the end you will have a structured workspace, a meeting routine that produces decisions, an organized file library, and a personal setup that keeps the noise down.

Foundations: Teams, Channels, and the Microsoft 365 Backbone

Decide how many teams you need, design a deliberate channel structure, and build your first team with sensible permissions.

Exercise: One Team or Several? Decision

For one real group you support, answer each prompt in a single line. If the membership is the same and the work is just different streams, build one team with channels; create a separate team only when the people or the access genuinely differ.

- Who needs to be in this workspace, and is that the same set of people for all the work, or do some parts need a different or external audience?

- List the distinct streams of work this group handles (aim for five to ten); could each be a channel inside one team?

- Is there anything sensitive (budgets, hiring, a client who should not see everything) that needs a closed space inside or beside the team?

- Based on your answers, how many teams will you create, and what is the one reason any second team exists rather than being a channel?

Worksheet: Channel Architecture Plan

Before creating anything, plan the channels for one team. Name each channel as an ongoing workstream or project, not a person or a one-off task. Mark each as standard, private, or shared, and remember General is best reserved for announcements.

Team name and its single purpose in one sentence

General channel job (recommended: announcements only)

Standard channel 1 name and the workstream it holds

Standard channel 2 name and the workstream it holds

Standard channel 3 to 6 names (one per workstream)

Any private channel name and why it must be closed (gets its own SharePoint site)

Any shared channel name and which external partner joins it

One sentence: how a newcomer would understand the team's work from this channel list

Checklist: First Team Build Checklist

- Create the team (Teams rail, Join or create a team, Create team), choosing Private, Public, or Org-wide deliberately
- Add at least two owners so the team is never orphaned
- Create one channel per planned workstream, named as states of work, in a sensible order
- Set General to announcement or moderated posting so it stays a clean feed
- Open Manage team, Settings, and set member permissions for creating and deleting channels
- Set @mention permissions so no one notifies the whole team by accident
- Add any private or shared channels and confirm their membership
- Ask members to pin the two or three channels they live in and hide the rest

Meetings That Run on Time and Produce Decisions

Schedule with an agenda, run with recording and breakouts, and close every meeting with assigned tasks.

Worksheet: Meeting Setup Sheet

Plan one real meeting before you send the invite. Decide where it lives, write the agenda into the invite body, and pick the options that prevent the usual problems. A channel meeting keeps the record shared; a private meeting keeps it to the invitees.

Meeting name and goal in one sentence (what must be true when it ends)

Channel meeting or private meeting, and why

Agenda line 1 (topic and what you need from attendees)

Agenda line 2

Agenda line 3 (and any blockers or decisions to surface)

Presenters and any co-organizer (so attendees cannot accidentally take over)

Lobby rule for external guests, and whether attendee mics and cameras are on

Recording and transcription: on or off, and how you will tell attendees

Exercise: Run-the-Meeting Rehearsal

Run one meeting using the in-meeting tools, then answer each prompt afterward. The goal is to practise capturing the session and keeping it on track, not to talk the most.

- Did you start recording and transcription and announce it out loud? Where did the recording link appear afterward?

- Did you assign a timekeeper and a note-taker before starting, and did the agenda stay on screen?

- If you used breakout rooms, how many rooms, how long, and what did each group report back?

- Which agenda item ran long, and did you park it as a follow-up rather than letting it eat the clock?

Worksheet: Decision and Action Capture

In the last five minutes of the meeting, fill this in live and read it back to the room. Every action gets a verb-first task, one owner, and a date, then goes straight into the channel's Planner tab.

Decision 1 (what was decided, in one line)

Decision 2

Decision 3

Action 1 (verb-first task), owner, due date

Action 2 (verb-first task), owner, due date

Action 3 to 4 (verb-first task), owner, due date

Where the recap will be posted (which channel) and who posts it

Checklist: Meeting Close Checklist

- [] Meeting notes (Loop) captured decisions and actions live during the call
- [] The three decisions were read back and confirmed before anyone left
- [] Each action was assigned to a single named owner with a due date
- [] Actions were added to the channel's Tasks by Planner and To Do tab
- [] A short recap was posted to the channel for anyone who missed it
- [] The Recap tab holds the recording, transcript, shared files, and notes
- [] Next meeting's agenda starts with a review of these actions

Files, Co-Authoring, and the SharePoint Library Behind Every Team

Keep one true copy in SharePoint, co-author it live, and organize files so the team can find them months later.

Worksheet: File Location Map

For one team, write down where each kind of file should live so the team never loses track. Channel files live in the team's SharePoint library; chat files live in the sender's OneDrive; private and shared channels store separately.

Team SharePoint site name (where standard-channel files live)

Which channel folder holds shared working documents

Which channel folder holds final or published assets

Where templates live so people reuse them

Any private channel and a note that its files sit on its own separate site

One file type that currently lives in chat or email and should move to a channel

One sentence: the rule the team agrees on for what belongs in a channel versus a chat

Exercise: Co-Authoring and Recovery Drill

Practise the workflow that ends version sprawl. Create one document in a channel's Files tab and run the drill, then answer each prompt.

- With two or more people in the same document at once, could you see each other's cursors and changes saving automatically?
 - Open the file's three-dot menu, choose Version history, delete a paragraph, then restore an earlier version. Did it come back cleanly?
 - Using Share or Copy link, did you set view-only versus edit and the right audience instead of attaching the file?
 - What is one document your team currently emails around that should become a single linked copy instead?
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Worksheet: Naming Convention and Folder Plan

Agree a naming standard and a shallow folder structure for one channel, then write it at the top of that channel so everyone follows the same one. Lead filenames with a date in year-month-day form so an alphabetical list sorts itself.

Date format to lead every filename (e.g. 2026-03-14)

Filename pattern after the date (e.g. date + project + document type)

Words to avoid in names (e.g. final, v3) and why

Folder 1 name and what goes in it

Folder 2 name and what goes in it

Folder 3 to 4 names (keep it two levels deep at most)

Two or three documents to pin as channel tabs because they are opened daily

Apps, Automation, and Async Habits That Cut the Noise

Pin the right tools as tabs, automate sign-offs and reminders, and configure notifications and status to protect focus.

Worksheet: Channel Tabs and Apps Planner

For one channel, plan the tabs and apps that turn it into a purpose-built workspace. Add with intent: whatever the team opens repeatedly here becomes a tab; a channel cluttered with unused tabs is as noisy as one with none.

Channel name and the work it supports

Document or file to pin as a tab (e.g. the plan, the tracker)

Tasks by Planner and To Do: yes or no, and what board it holds

A live report or dashboard to pin (e.g. Power BI)

A Microsoft Form to add (poll, request, or survey) and what it captures

Any third-party app the team already uses that should live here

One sentence: the browser tabs this collects into one place

Worksheet: Automation and Approval Designer

Design two automations using built-in Approvals and Workflows (Power Automate templates). Favour the sign-off or reminder you handle many times a week. You will build these from the channel's three-dot menu under Workflows, or via the Approvals app.

Approval 1: what is being approved, the approver, and what gets attached

Approval 1: where the timestamped result should be visible (which channel)

Workflow 1 trigger (e.g. a Form is submitted, a keyword is posted, a weekly schedule)

Workflow 1 action (e.g. post a card, notify a person, create a task)

Workflow 2 (e.g. a Friday reminder to update tasks, or a welcome message for new members)

Which manual task you do more than a few times a month that this replaces

Worksheet: Personal Notification and Focus Setup

Configure your own Teams so it stops interrupting you. Follow only the few channels you truly need post-by-post and set the rest to mentions-only. Fill this from Settings, then Notifications and activity, and the mobile app.

Channels set to all new posts (keep this list very short)

Channels set to replies and @mentions only

Channels set to @mentions only or off

Quiet hours and quiet days set in the mobile app (your working window)

Do Not Disturb plan for focus blocks, and who may still reach you

Status message to set expectations (e.g. In deep work until 2pm, will reply after)

Your team's agreed normal response time (e.g. within one working day)

Checklist: Async-First Habits Checklist

- Per-channel notifications are tuned so the channels that matter stand out
- Quiet hours and a status message are set so silence is not mistaken for ignoring
- Replies go in the existing thread rather than starting a new post
- Messages carry full context and a clear ask so no one waits a day for a follow-up question
- @mentions are used deliberately, and @everyone and the urgent flag are reserved for genuinely urgent things
- Complex explanations are recorded as a short video for colleagues in other time zones
- The team has agreed that a response within a working day is normal

Your Action Plan

1. Decide how many teams you need, then design a channel structure with five to ten workstream channels and reserve General for announcements.
2. Build the team with at least two owners, set member and @mention permissions, and add any private or shared channels.
3. Schedule one real meeting as a channel meeting with a three-line agenda in the invite and the right presenter and lobby options.
4. Run it with recording and transcription on, a named timekeeper and note-taker, and breakout rooms if the group is large.
5. Close every meeting by confirming decisions and assigning each action to one owner with a date in the channel's Planner tab, then post a recap.

6. Move one recurring document into a channel's Files tab, co-author it live, and share a link instead of emailing attachments.
7. Agree a date-led naming convention and a shallow folder structure, write it at the top of the channel, and pin the daily documents as tabs.
8. Pin the team's key tools as channel tabs and add Tasks by Planner, a Form, or a dashboard where it earns its place.
9. Set up one Approval and one Workflow for a sign-off or reminder you handle many times a week.
10. Tune your per-channel notifications, set quiet hours and a status message, and agree a one-working-day response norm with the team.

