

## Design Document

# Introduction to Microsoft Teams

<b>Learning Path Title:</b> Introduction to Teams	<b>LP Length:</b>	<b>LP ID</b> XXX
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### **Learning Path Description/Summary:**

In this learning path, the learner will develop an understanding of the Microsoft Teams collaboration application. The learner will gain foundational knowledge on Teams' features, benefits, and integrated functionality with other M365 applications. Learners will be able to identify end-user best practices and will be able to locate public-facing resources to share with clients. Using a test account created by the learner, the learner will be introduced to the Teams admin center and be able to define tabs and access points to additional Microsoft admin centers. The learner will also be introduced to the different M365 subscription plans and licensing that include Teams.

### **Learning Path Objectives:**

At the end of this learning path, the learner will be able to:

#### **Module 1: Introduction to Teams**

1. Define Teams.
2. Identify the different M365 subscription plans that include Teams.
3. Describe the impact licensing has on Teams functionality and accessibility.
4. Given a list of specific business pain points, devise the best-fit option for Teams licensing and subscription.

#### **Module 2: Overview of Teams**

1. Identify available platforms for Teams.
2. Provide a high-level description of each tab on the Teams dashboard.
3. Access the Teams Admin Center.
4. Describe the functionality of each tab on the Teams Admin Center's navigation panel.

#### **Module 3: Teams in MS Teams**

1. Create a team from scratch or from a template.
2. Organize teams.
3. Manage teams.
4. Identify best practices for using teams.

#### **Module 4: Channels**

- Differentiate between types of channels.
- Create and organize channels within a team.
- Describe the functionality of the basic features in channels, including integration with M365 and Apps.

#### **Module 5: Chat and Calls**

1. Leverage commonly used features of Teams Chat to collaborate.
2. Utilize call features in Teams.

3. Identify best practices when using the chat and call features.

### **Module 6: Video Conferencing**

- Schedule, start, and join meetings in Teams.
- Identify video conferencing features used most often.
- Identify accessibility features of Teams meetings.

### **Module 7: Teams Phones**

- Describe the process of setting up the Teams Phone System.
- Manage phones in Teams.

### **Module 8: Customer Scenarios**

- Assist with Teams customer issues in a simulated environment.

### **Module 9: Cumulative Assessment and Summary**

#### **Task Inventory/Listing:**

#### **Module 1: Introduction to Teams**

- Define Teams.
- Locate the public-facing documentation for preparing an organization's network for Microsoft Teams.
- Identify the business, enterprise, education, and government subscription plans that include Teams.
- Introduce Teams Essentials and Teams Free as subscription options.

#### **Module 2: Overview of Teams**

- Identify available platforms for Teams.
- Access the Teams Admin Center.
- Identify the main purpose of each tab on the Admin Center's dashboard. (example with Allow guest and external access to a team.)
- Introduction to Teams and Channels (basic organization)
- Describe the overall purpose of the Teams, Channels, Chat, Calls, Activity, Calendar, and Files tabs on the Teams dashboard.
- Teams and teams admin center scavenger hunt.

#### **Module 3: Teams in MS Teams**

- Create a team from scratch.
- Create a team from a template.
- Introduce the General channel that comes with a team.
- Organize the teams list.
- Hide/Show teams.
- Pin/unpin teams
- Add/remove members.
- Set member roles.
- Change team settings.
- Archive/restore teams.
- Best practices.

#### **Module 4: Channels**

- Describe the General channel.
- Differentiate between standard, private, and shared channels.
- Create standard and private channels within a team.
- Describe a channel's tabs
- Pin/unpin a channel.
- Show/hide a channel.
- Manage channel notifications, delete channels.
- Set permissions in a standard channel.
- Add members to a private channel.
- Share a shared channel.
- Add apps to a channel.
- Post, schedule, reply to, react to, and save messages.
- Use @mention in a message.
- Using tags to @ mention sub-group of people.
- Upload and share files in a channel.
- Send an email to a channel.
- Best practices.

#### **Module 5: Chat and Call Features**

- Post, reply to, react to, and delete chats.
- Share files in a chat.
- Record and send a video clip in chat.
- Make a call from a chat.
- Access call history (with details).
- Open incoming calls in a second window.
- Best practices.

#### **Module 6: Meetings**

- Schedule a meeting using the calendar or in a channel.
- Start a meeting (scheduled or instant).
- Join a meeting.
- Invite people to a meeting that is already running.
- Set attendee audio and video permissions.
- Record and start a transcript for a meeting.
- Turn on live captions.
- Real-time background noise suppression.
- Change backgrounds in a meeting.
- Share screen and PowerPoints.
- Pop out shared content.
- Use the whiteboard.
- Raise/lower hand and reactions.
- Use breakout rooms.
- Change meeting view (gallery, together mode...)
- Best practices.

### **Module 7: Teams Phone System**

- Set up your Teams phone system.
- Device management

### **Module 8: Putting it all together**

- Customer scenarios with critical thinking/decision making – include going to teams admin center at some point, maybe to set guest permissions...build in best practices as well.
- Using customer scenarios, match customer needs to specific Teams features through a consultative approach.

### **Module 9: Cumulative Assessment and Summary**

- Earn a minimum score of 80% on cumulative assessment to complete the learning path.

### **Evaluation/Measurement Strategy:**

Throughout the learning path or by the end of the modules, the learner will be evaluated to ensure they are at the required proficiency by:

1. Exercises where the learner can practice skills in an immersive environment while receiving real-time feedback.
2. Demonstrating specific skills through simulation in an eLearning environment, performing specific tasks, and navigating.
3. Interaction (if facilitated) with other classmates and the facilitator through discussion and question and answer.
4. Progress checks where the learner will have to correctly answer questions or demonstrate an understanding of key concepts and tasks to be performed. The learner will complete the knowledge check with a minimum score of 80% to continue to other content.
5. A final, cumulative assessment where they are required to pass with a minimum score of 80% to determine proficiency in the overall learning path content.

### **Instructional Guidance:**

1. Self-paced modular eLearning Approach  
The learners will experience a blended Computer Aided Instruction (CAI) approach where CAI is their foundation or home base. They will be instructed to research and discover concepts outside of CAI using knowledge articles, web-references, videos, and other Microsoft resources for learning, then return to CAI to complete their instruction. If reviewing articles or web references, learners will start with contextualization in the CAI platform, exit the platform to review the resources (as needed), practice in a simulated or real environment, return to the platform, and answer a series of knowledge check questions related to the content.
2. Instructor-Led Approach  
Learners will still experience a blended CAI approach similar to the self-paced eLearning approach; however, the facilitator will be required to provide context to the class, reinforce the objectives, and identify how they will be measured. It will be critical for the facilitator to ensure that each learner is ready prior to starting self-directed learning.  
During the learner's self-directed time in CAI, the facilitator will roam throughout the room

or observe the class, providing necessary assistance, and taking note of any struggles that specific learners may have (to provide ongoing coaching).

Upon completion, the facilitator should summarize the objectives, ask probing questions based on observations, and reinforce the importance of this training in achieving an incredible customer experience. The facilitator should connect this content to previous modules/learning paths and transition effectively to the next learning phase.

**Module Flow:**

1. What is Microsoft Teams?
2. Subscriptions and Licensing
3. How to set up and manage Teams
4. Features and functionality of Channels
5. Features of Chat and Calling
6. Features of Voice Conferencing
7. Best Practices
8. Introduction to Teams admin center

**Job Aids:**

1. Microsoft 365 Subscriptions that Include Teams
2. Microsoft Teams Features
3. The Teams Admin Center
4. Microsoft Teams Phone System