

# Building the Foundation for Collaboration & Knowledge Sharing with Microsoft Teams



Presented By  
John H. Higgins, CPA.CITP  
Rochester, Michigan

# Learning Objectives



- Identify all the ways you can use Teams to communicate, collaborate and share knowledge
- Identify best practices for configuring your teams and channels

# John H. Higgins, CPA.CITP

## Strategic Technology Advisor



[john@higginsadvisoryllc.com](mailto:john@higginsadvisoryllc.com)

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Nationally recognized thought leader, advisor, author and speaker on CPA technology

Strategic technology advisor to the profession w/ 35+ years of experience

Founded and sold two CPA technology advisory startups

Former National Mid-market Technology Partner - BDO

CPA Practice advisor Top 25 Thought Leader for the CPA profession

AICPA Business & Industry Hall of Fame Inductee

Past Chair of the Michigan Association of CPAs

Passionate advocate for the CPA profession!

# Presentation Outline

- Teams Role in the Microsoft 365 Ecosystem
- Orientation to the Teams App Features
- Best Practices for Organizing Teams & Channels
- Leverage Teams for Meetings and Calls
- Wrap-up

# TEAMS ROLE IN THE MICROSOFT 365 ECOSYSTEM



Establish Teams as your hub  
for communications,  
collaboration and  
knowledge sharing

# Communication, Collaboration & Knowledge Sharing

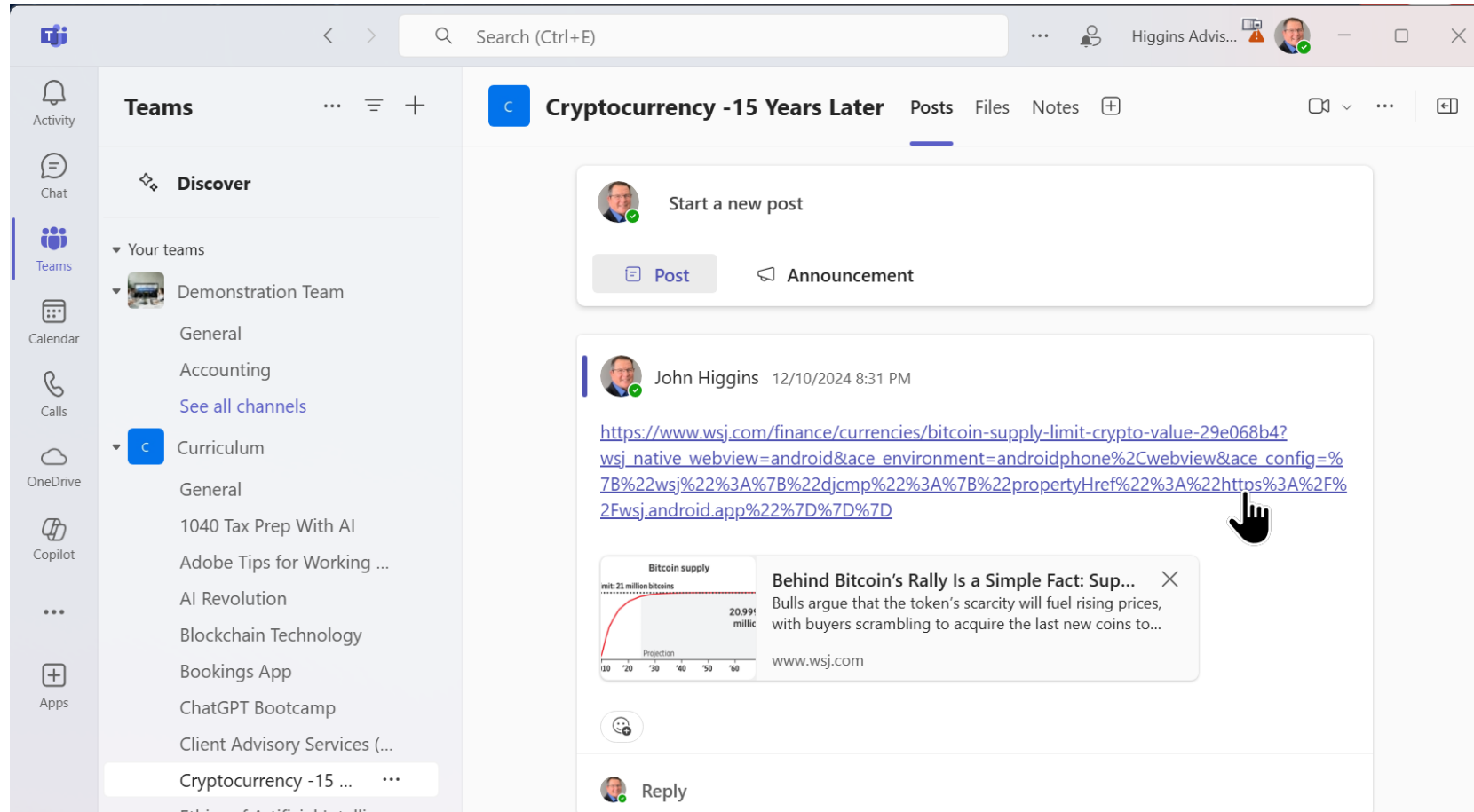
- ✓ Central repository for all your conversations
- ✓ Central hub for accessing all your files
- ✓ Launch pad to access all your apps
- ✓ Communications gateway to external parties
- ✓ Email replacement
- ✓ Optimize Microsoft 365 integration value

# Teams Features Review


- Teams & Channels
  - ✓ Posts (conversations)
  - ✓ Files (SharePoint)
  - ✓ Tabs (shortcuts)
- Chats
- Calendar / Meetings
- Calls



# ORIENTATION TO THE TEAMS' APP FEATURES





# Teams Conversation Posts Interface

 John Higgins 10/8/2023 9:58 AM


**Welcome**

Hello [John Doe NewCo CFO \(Guest\)](#) and [Nicole Doe NewCo Owner \(Guest\)](#). I would like to personally welcome you to this portal site that has been setup to allow you to communicate and share files with us securely and efficiently. I would like to shcedule a brief 20 minute training session with you to orient you to the system. Sincerely, John Higgins




 Nicole Doe NewCo Owner (Guest) 10/8/2023 9:59 AM


That is great to hear John. We are ready when you are. Please let us know when we can schedule the training. 😊


 John Higgins 10/8/2023 10:01 AM

Please use this link to schedule a 30 minute meeting for a time that is convenient for you. [link](#)

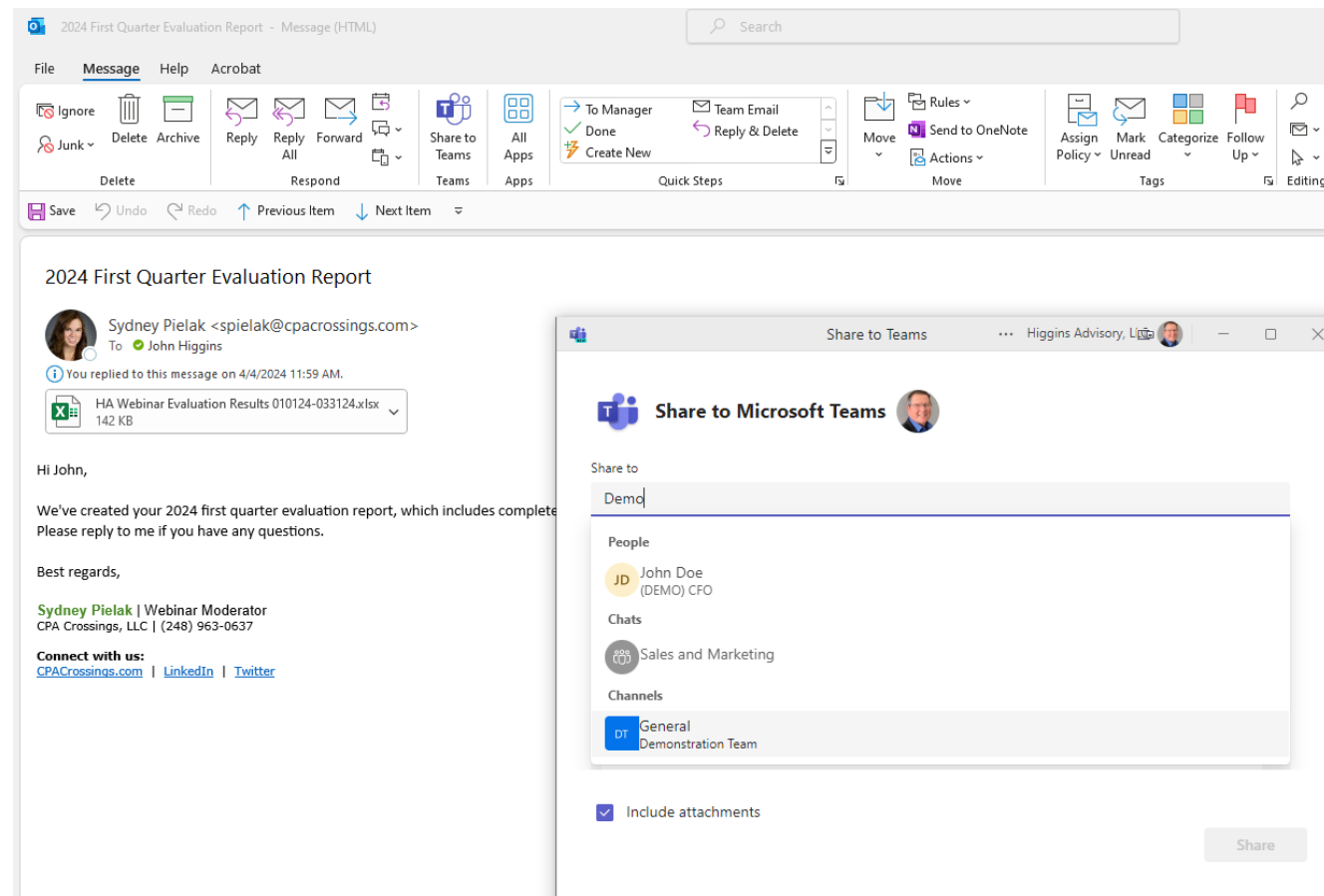


**Higgins Advisory, LLC - You can book online!** ✕  
You can now book and manage appointments using our booking page.  
[outlook.office365.com](https://outlook.office365.com)

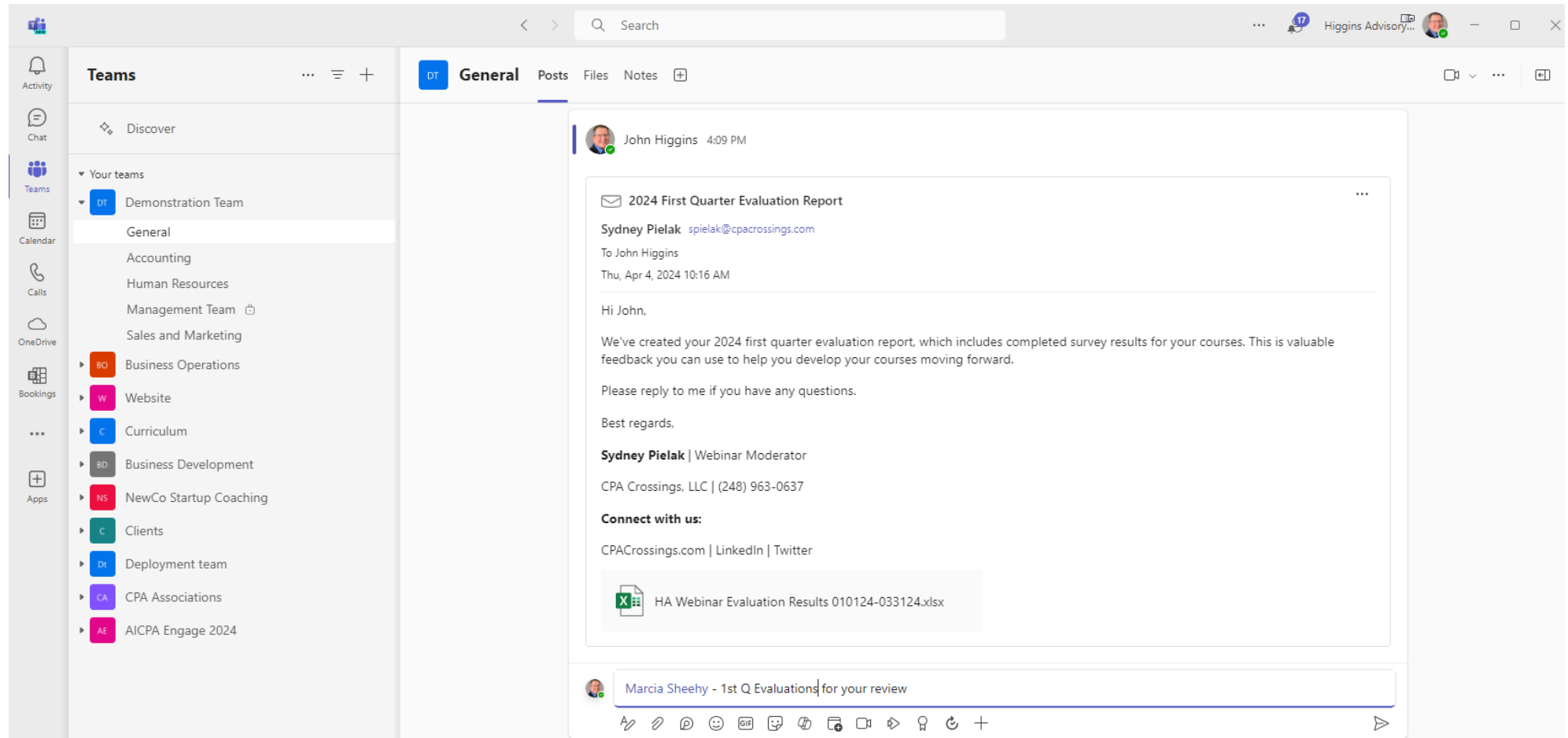
 Reply



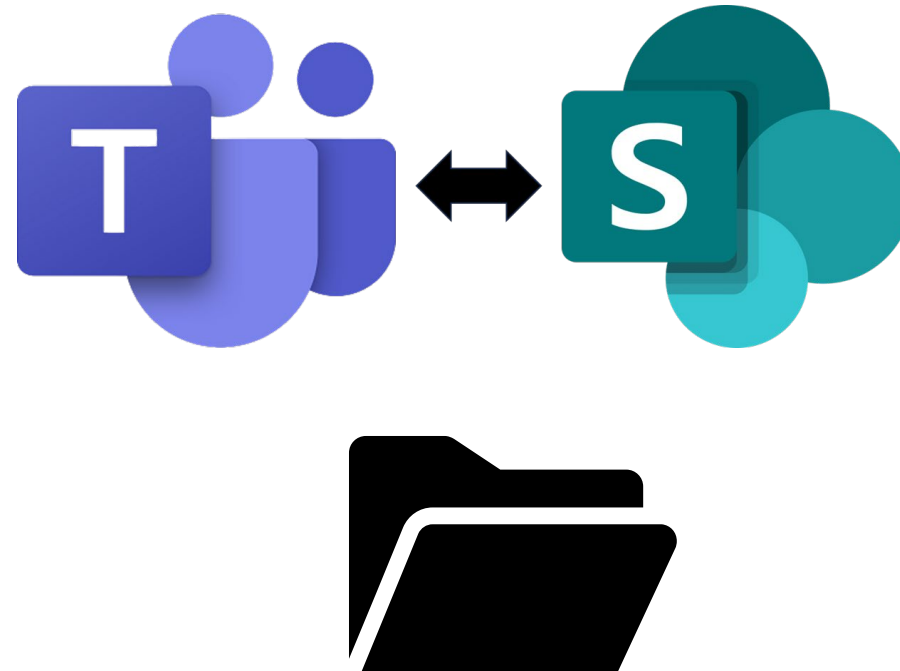
# Post Emails to Teams



# Post Emails to Teams (continued)



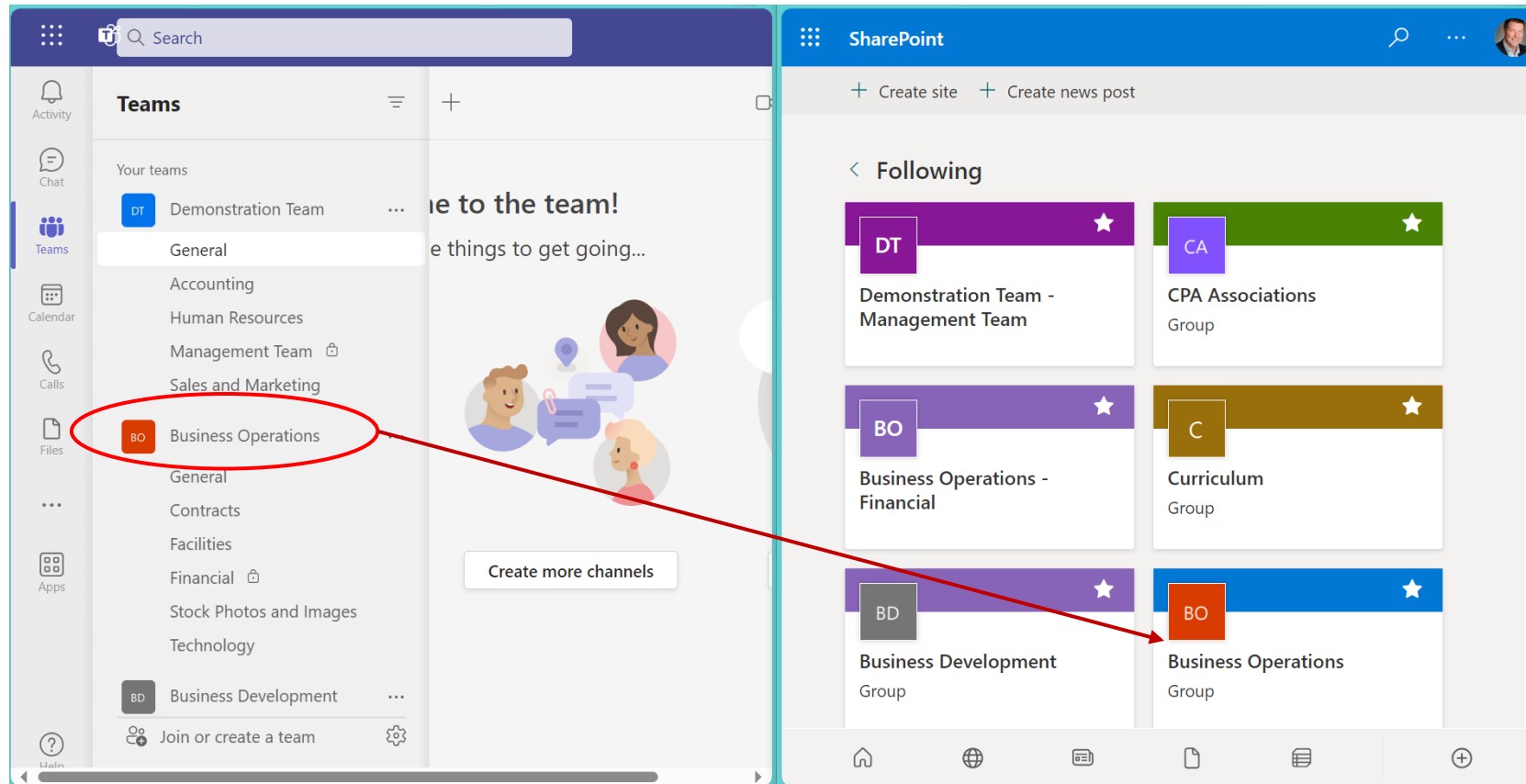
# WORKING WITH FILES IN TEAMS



# SharePoint Overview

- Storage of files and other content for “shared” group access
- Files are organized by “SharePoint sites”
- 1 to 1 relationship between Teams and SharePoint sites
- OneDrive is a SharePoint site for individual user access only
- SharePoint’s purpose has evolved with development of Teams app

# Teams & SharePoint Relationship



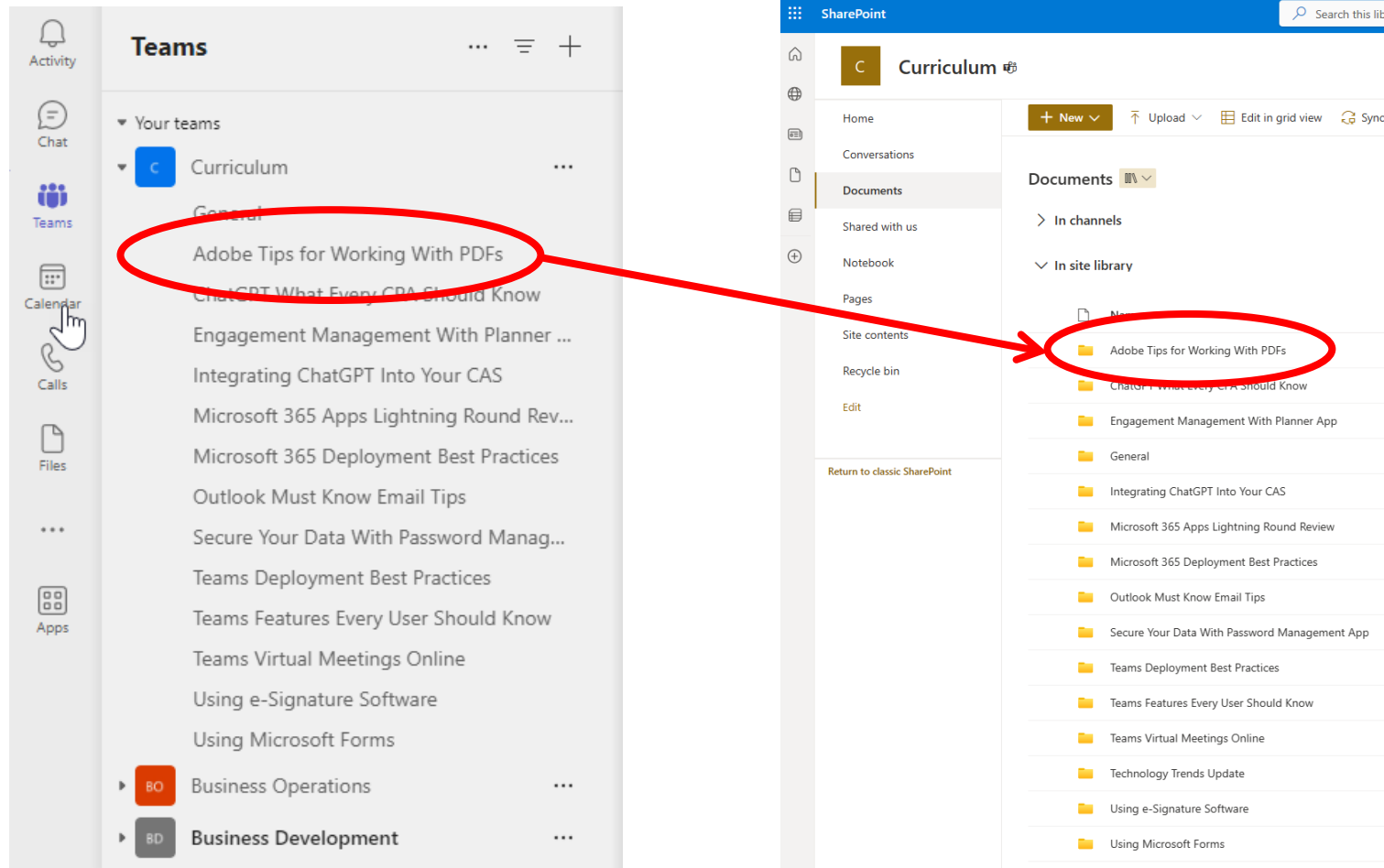
# Teams Files Tab

The screenshot displays the Microsoft Teams interface, specifically the 'Files' tab for the 'NewCo External' team. The left sidebar shows navigation options: Activity, Chat, Teams (selected), Calendar, Calls, OneDrive, Copilot, and Apps. The 'Teams' section lists various teams, including 'NewCo External', which is highlighted. The main content area shows the 'NewCo External' team's files. At the top, there are tabs for 'Posts' and 'Files' (selected). Below the tabs, there are options to '+ New', 'Upload', and 'Edit in grid view'. The file list is organized into columns: Name, Modified, and Modified By. The files listed are:

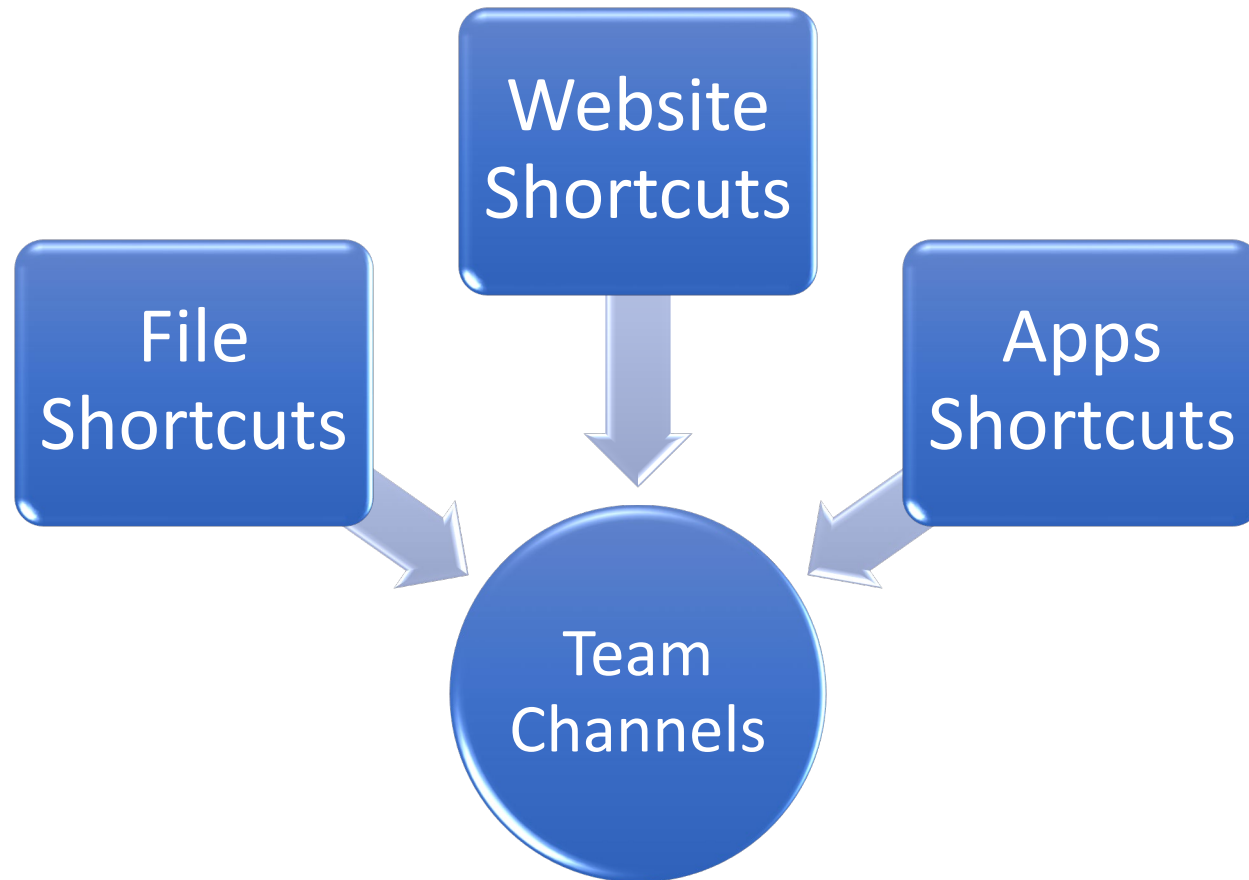
| Name                              | Modified        | Modified By  |
|-----------------------------------|-----------------|--------------|
| Financial Sample.xlsx             | July 17, 2024   | John Higgins |
| GM 2022 Annual Report (FINAL).pdf | October 8, 2023 | John Higgins |
| VSCPA Demo.xlsx                   | July 17, 2024   | John Higgins |



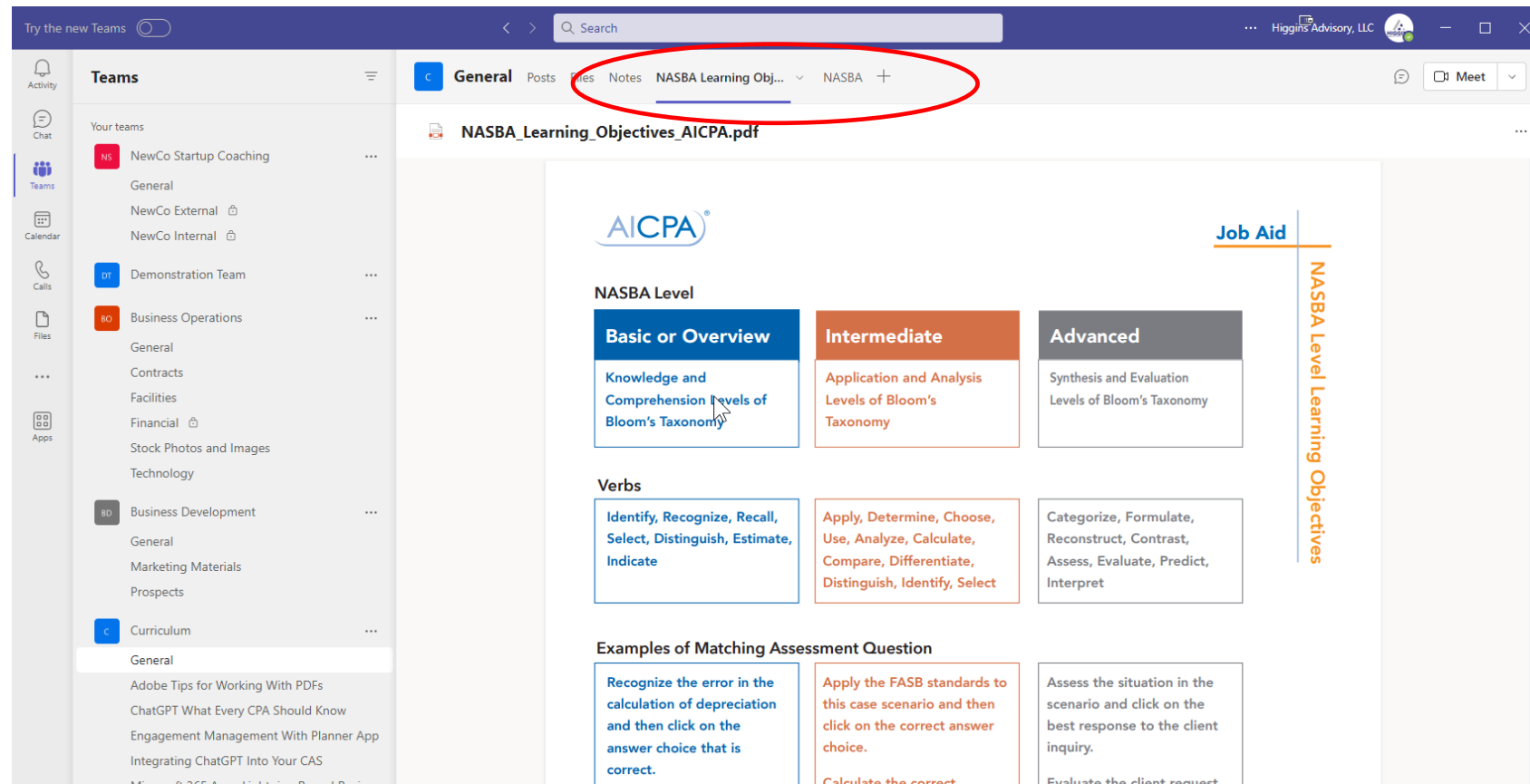
# Teams Channel – SharePoint Site Folders 1:1



# LINKING TO CONTENT & APPS IN A CHANNEL



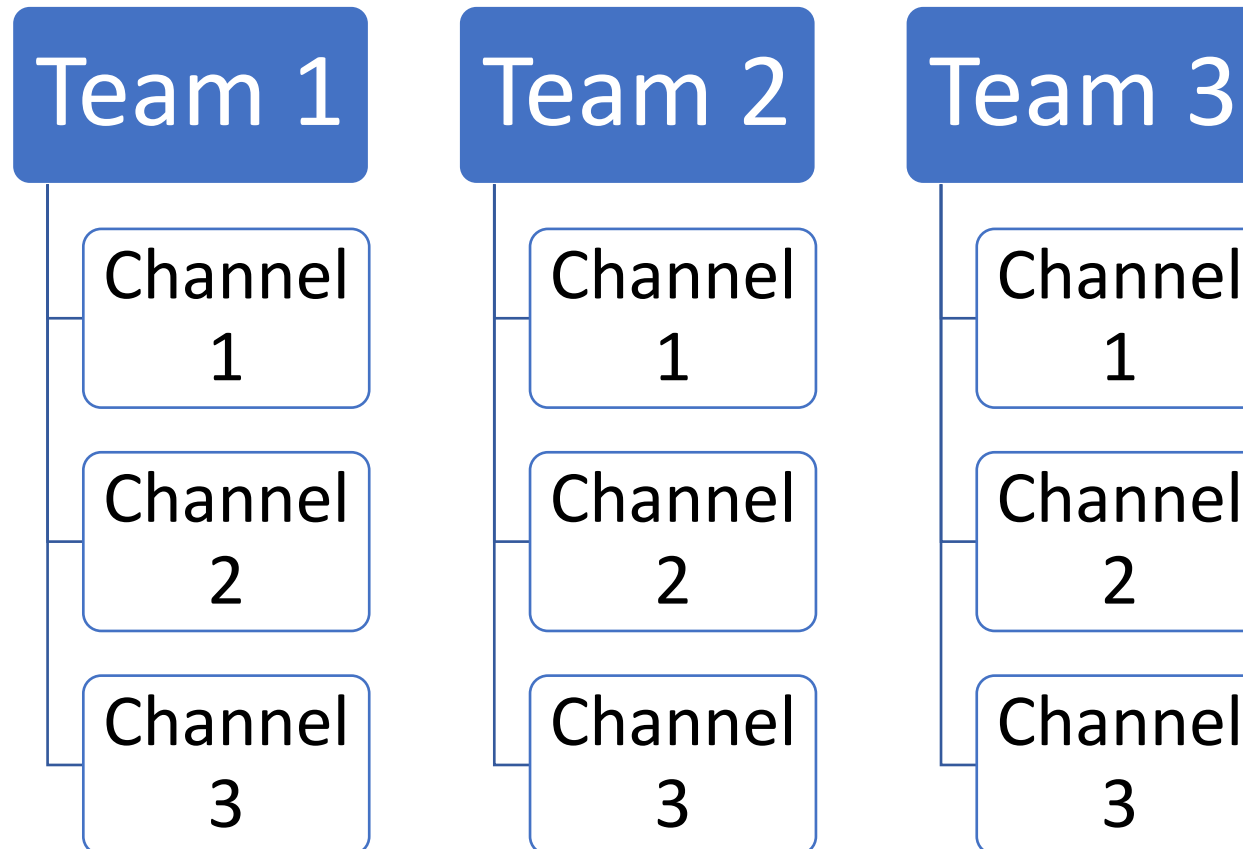
# Customize Teams Channel Tabs



# Things to Know About Teams Channel Tabs

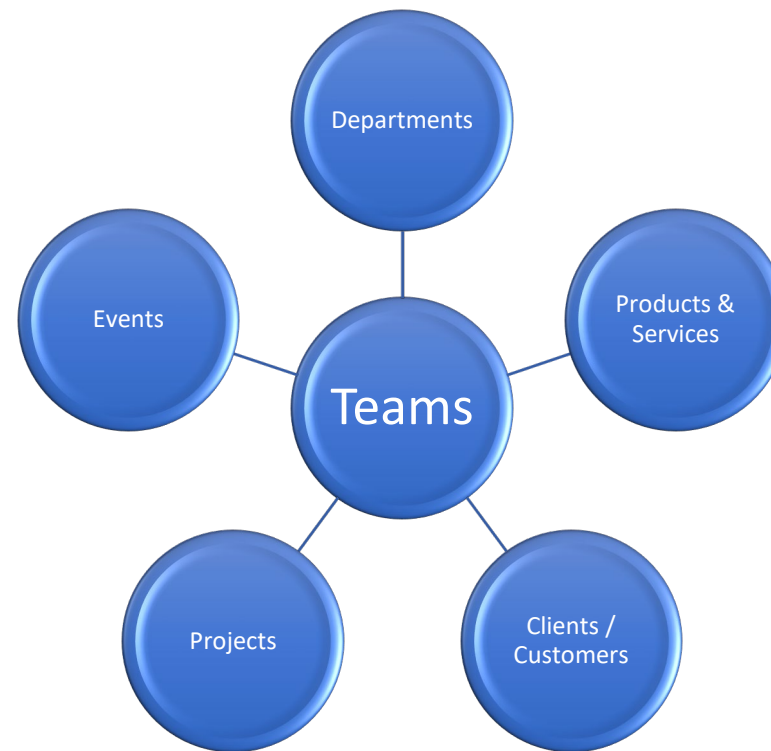
- You can create tabs to link to:
  - ✓ OneDrive / SharePoint Files
  - ✓ Other cloud storage file links
  - ✓ Internal and external software applications
  - ✓ External websites
- Website tabs must be secure https://

# BEST PRACTICES FOR ORGANIZING YOUR TEAMS AND CHANNELS



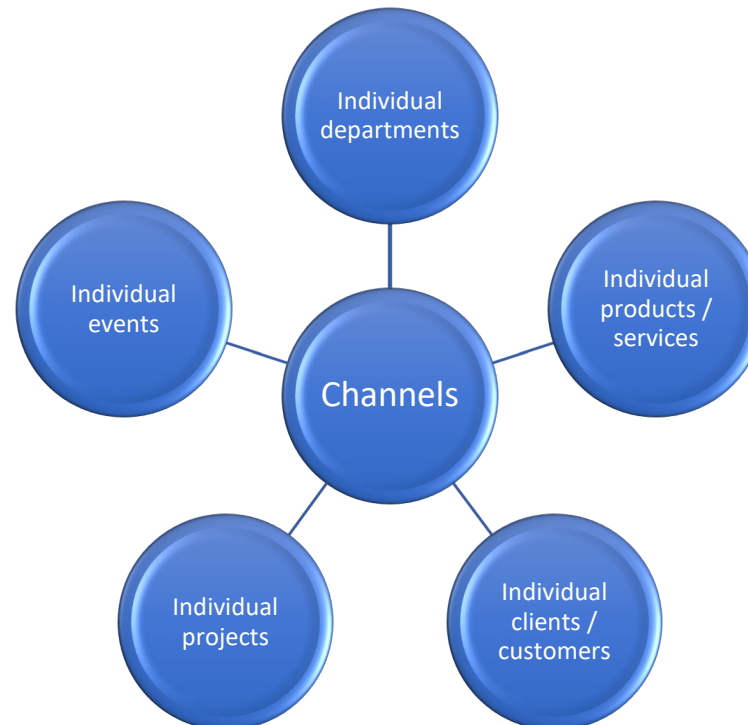
# Teams

Establish around activities where groups work together



# Channels

Subset of a team to organize your content in greater detail



# Teams & Channels Setup Best Practice Tips

- ✓ Think of it like establishing a chart of accounts
- ✓ Take time to plan with participation from across the enterprise
- ✓ Document your plan before configuring
- ✓ Start broadly and evolve to narrower focus
- ✓ Get staff feedback early



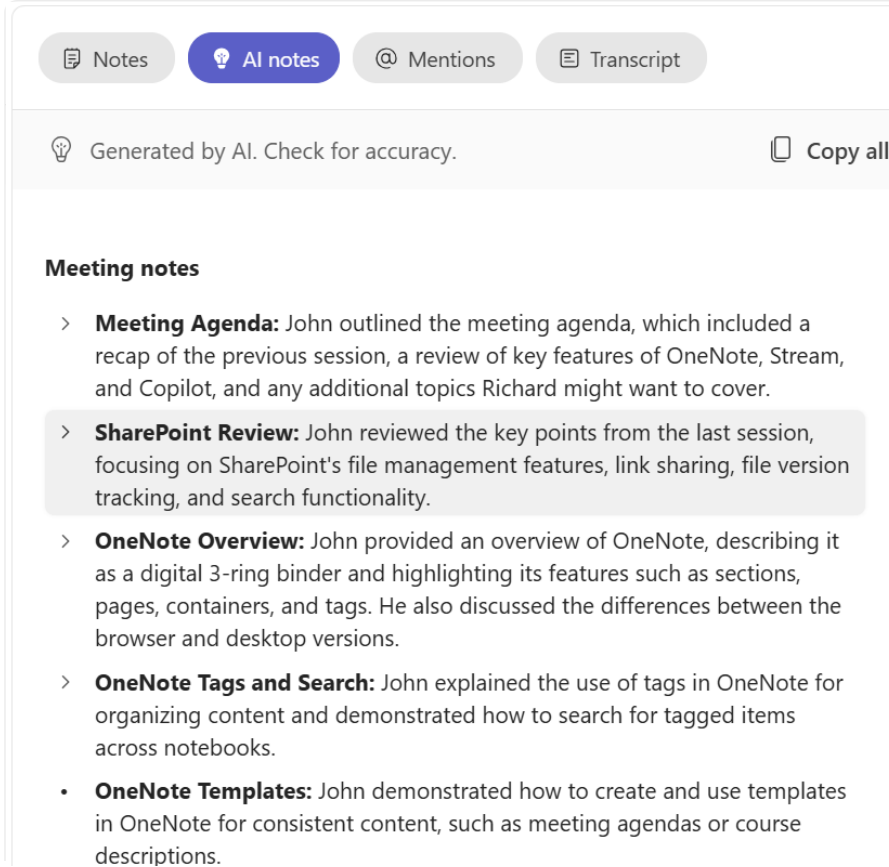
# LEVERAGE TEAMS FOR MEETINGS & CALLS



# Things to Know About Teams Meetings

- Meetings can be scheduled or spontaneous (meet now)
- Optional registration page
- Automatic or manual breakout rooms
- Record & transcribe option
- 1,000 participant max / 10,000 view only
- Copilot intelligent recap option available

# Recap Teams Meetings with Copilot



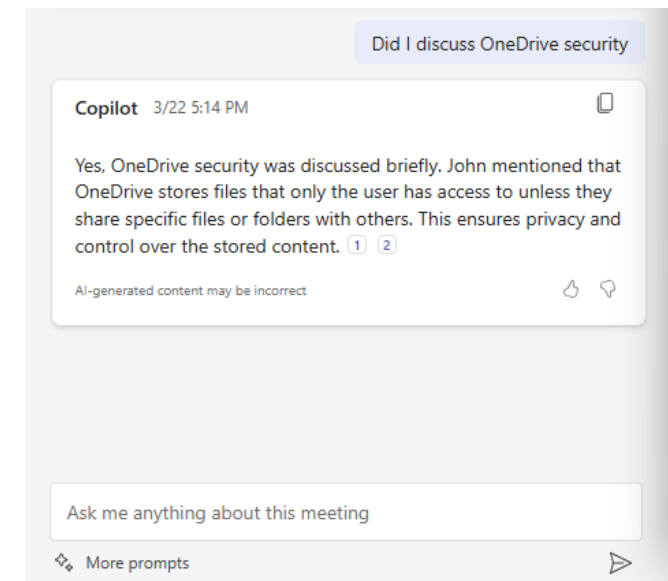
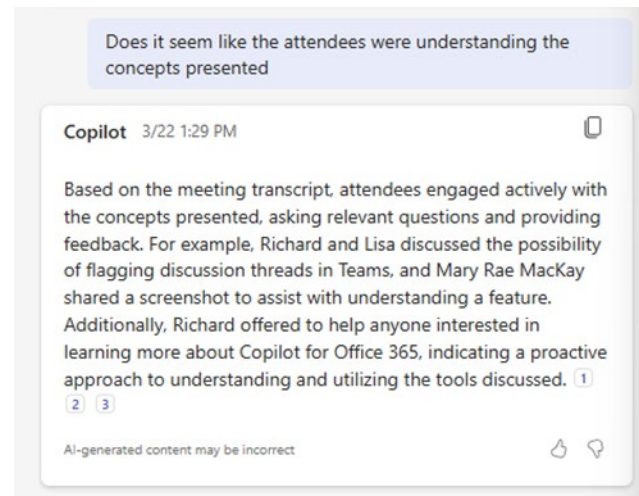
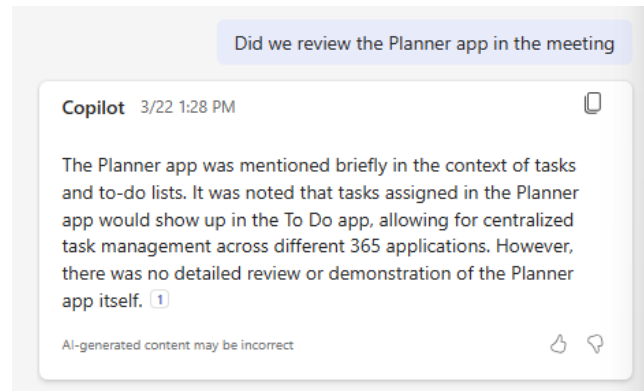
The screenshot shows the Microsoft Teams Copilot interface. At the top, there are four tabs: 'Notes', 'AI notes' (which is selected and highlighted in blue), 'Mentions', and 'Transcript'. Below the tabs, there is a light gray bar with a lightbulb icon and the text 'Generated by AI. Check for accuracy.' on the left, and a 'Copy all' button on the right. The main content area is titled 'Meeting notes' and contains a list of five items, each starting with a right-pointing chevron. The second item, 'SharePoint Review', is highlighted with a light gray background. The items are: 1. **Meeting Agenda:** John outlined the meeting agenda, which included a recap of the previous session, a review of key features of OneNote, Stream, and Copilot, and any additional topics Richard might want to cover. 2. **SharePoint Review:** John reviewed the key points from the last session, focusing on SharePoint's file management features, link sharing, file version tracking, and search functionality. 3. **OneNote Overview:** John provided an overview of OneNote, describing it as a digital 3-ring binder and highlighting its features such as sections, pages, containers, and tags. He also discussed the differences between the browser and desktop versions. 4. **OneNote Tags and Search:** John explained the use of tags in OneNote for organizing content and demonstrated how to search for tagged items across notebooks. 5. **OneNote Templates:** John demonstrated how to create and use templates in OneNote for consistent content, such as meeting agendas or course descriptions.

## Follow-up tasks

- **Copilot Feature:** Post information in the Teams channel about the current status and functionality of the bookmark feature in Teams. (John)
- **Copilot Feature:** Check and confirm the availability of the bookmark feature in Teams and update the team accordingly. (John)
- **Copilot Access:** Ensure that the Copilot button is enabled for all team members in the Edge browser and provide necessary instructions for access. (Richard)
- **Copilot Training:** Offer training sessions or resources for team members interested in learning more about Copilot for Office 365 and its applications. (Richard)
- **Power BI Training:** Identify a team member to become the expert in Power BI and provide them with necessary training resources. (Lisa)

Shared with explicit permission from the client

# Recap Teams Meetings Example (cont'd)



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# Using Teams Calls Feature

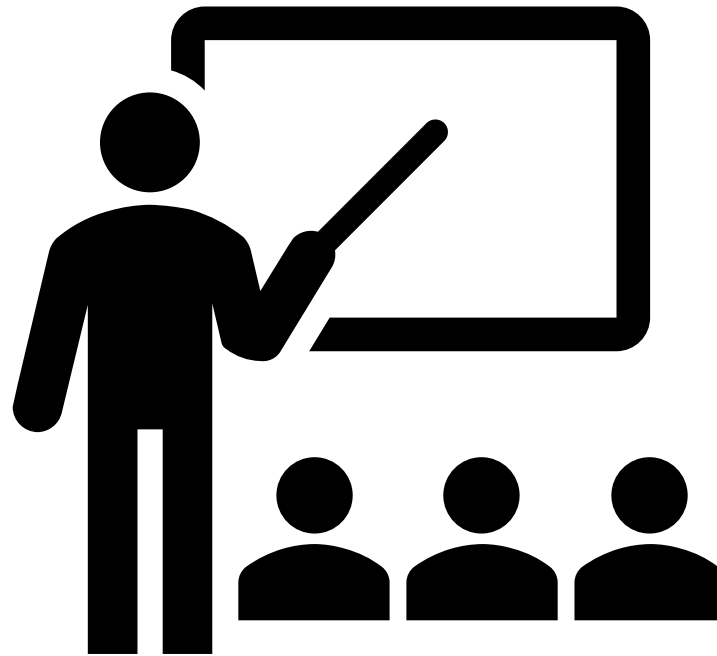
The screenshot displays the Microsoft Teams 'Calls' interface. At the top, there's a 'Calls' tab and a 'Personal' sub-tab. A 'View contacts' button is in the top right. Below the tabs, there's a search bar labeled 'Type a name' and a 'Call' button. The main area shows a list of recent calls, filtered by name or number. The list includes calls from Marcia Sheehy and Bryan Smith (External). A 'Speed dial' section on the right shows contacts for quick calling. At the bottom, there are options to 'Forward to voicemail' and '2- Plantronics Savi 7xx-M'.

| Call Status                     | Contact Name           | Time              |
|---------------------------------|------------------------|-------------------|
| Incoming forwarded to voicemail | Marcia Sheehy          | Yesterday         |
| Outgoing                        | Marcia Sheehy          | Tuesday 1m 46s    |
| Incoming forwarded to voicemail | Marcia Sheehy          | Tuesday           |
| Incoming forwarded to voicemail | Marcia Sheehy          | Monday            |
| Outgoing                        | Marcia Sheehy          | Monday            |
| Outgoing                        | Marcia Sheehy          | Monday 2m 35s     |
| Outgoing                        | Marcia Sheehy          | Monday 44s        |
| Outgoing                        | Marcia Sheehy          | 2/21/2025 8s      |
| Outgoing                        | Marcia Sheehy          | 2/20/2025 1m 12s  |
| Outgoing                        | Marcia Sheehy          | 2/20/2025         |
| Outgoing                        | Marcia Sheehy          | 2/20/2025 39s     |
| Outgoing                        | Marcia Sheehy          | 2/20/2025 3m 51s  |
| Outgoing                        | Bryan Smith (External) | 2/13/2025 11m 10s |
| Outgoing                        | Marcia Sheehy          | 1/31/2025         |
| Outgoing                        | Marcia Sheehy          | 1/31/2025 46s     |

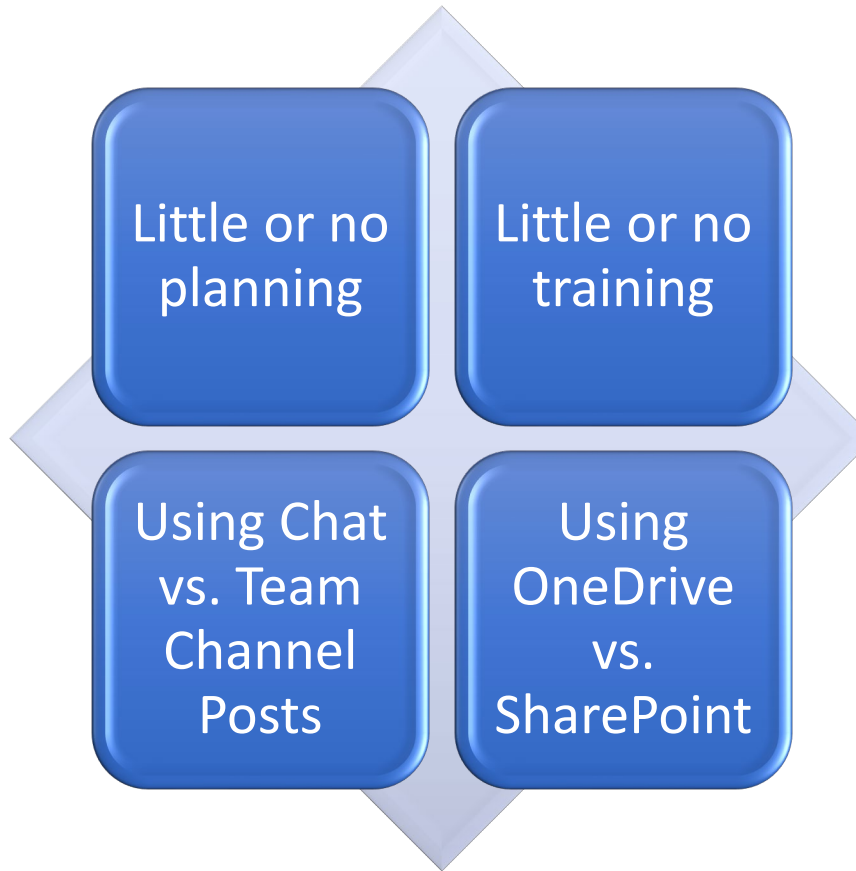
# Replace Your Phone System with Microsoft Business Voice

- Establish local phone numbers
- Voice mail
- Call forwarding
- Auto attendants
- Call routing
- Domestic / Toll-free / International call plans

# WRAP-UP



# Common Teams Deployment Failures





## In Summary

- Teams is a powerful resource to foster communication, collaboration and knowledge sharing
- Focus on using Teams as the launchpad for all you do in Microsoft 365
- Use Teams for all meetings
- Set a goal to eliminate internal email!

# Questions ?



# Thank you!!!

Let's connect on LinkedIn →

