



5 easy steps to get started with Microsoft Teams



Table of contents

Introduction

Step 1

Invite your team

Step 2

Download the app

Step 3

Pick a project

Step 4

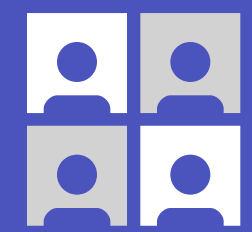
Set up a project kickoff
or weekly sync meeting

Step 5

Keep everyone engaged

That's it!

Welcome to Microsoft Teams



Getting started is easy—
and you'll be glad you did.

Teams is the hub for teamwork in Office 365. What does that mean? It means that Teams can help make the work your team does faster and easier. All team conversations, files, and meetings are available in one place, so searching and coordinating are easier.

Ready to get started? Let's check out the tips and tricks you need to know first.

Step 1

Invite your team

Microsoft Teams is for groups working on projects and creating things together. You can't do it alone!

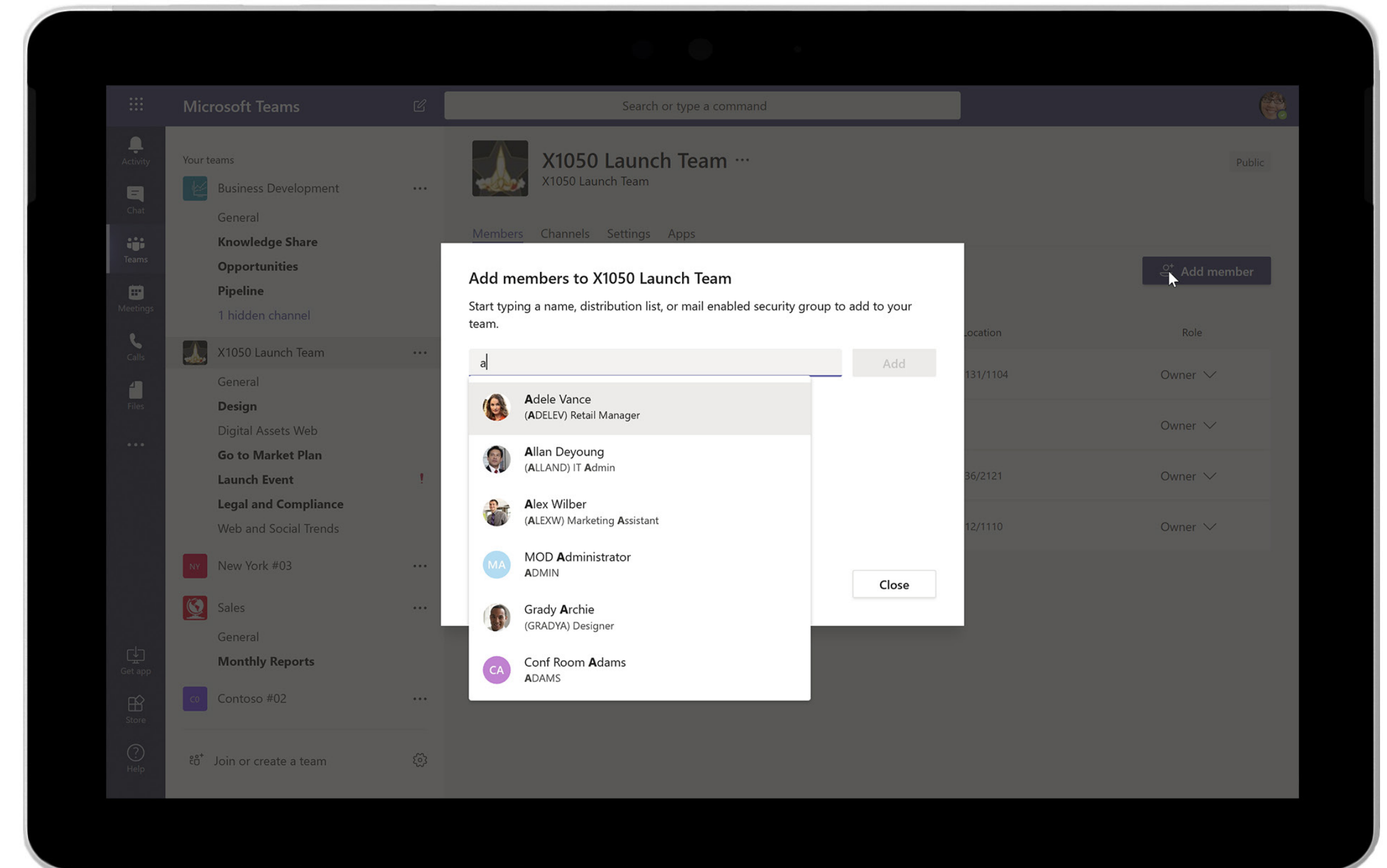
Here's how to invite people from your team:

Just start a chat with a few coworkers and welcome them to Teams. Encourage them to try Teams for private one-on-one chats or group conversations.

Checklist

Here are a few things to try:

- ✓ **Start a group chat with your team.** Share day-to-day updates and photos, praise wins, and ask quick questions. Get a coworker's attention with an @mention.
- ✓ **Add someone new.** Invite more people to the chat anytime—like if a new teammate joins.
- ✓ **Keep it light and fun.** Teams is great for quick, short conversations. React to someone's message with a 👍 emoji. Try adding a meme or sticker for more fun.



Add new members to a Team individually or in groups.

Pro tip

You can even include people from outside your organization in Teams. Just make sure guest access is turned on.

Step 2

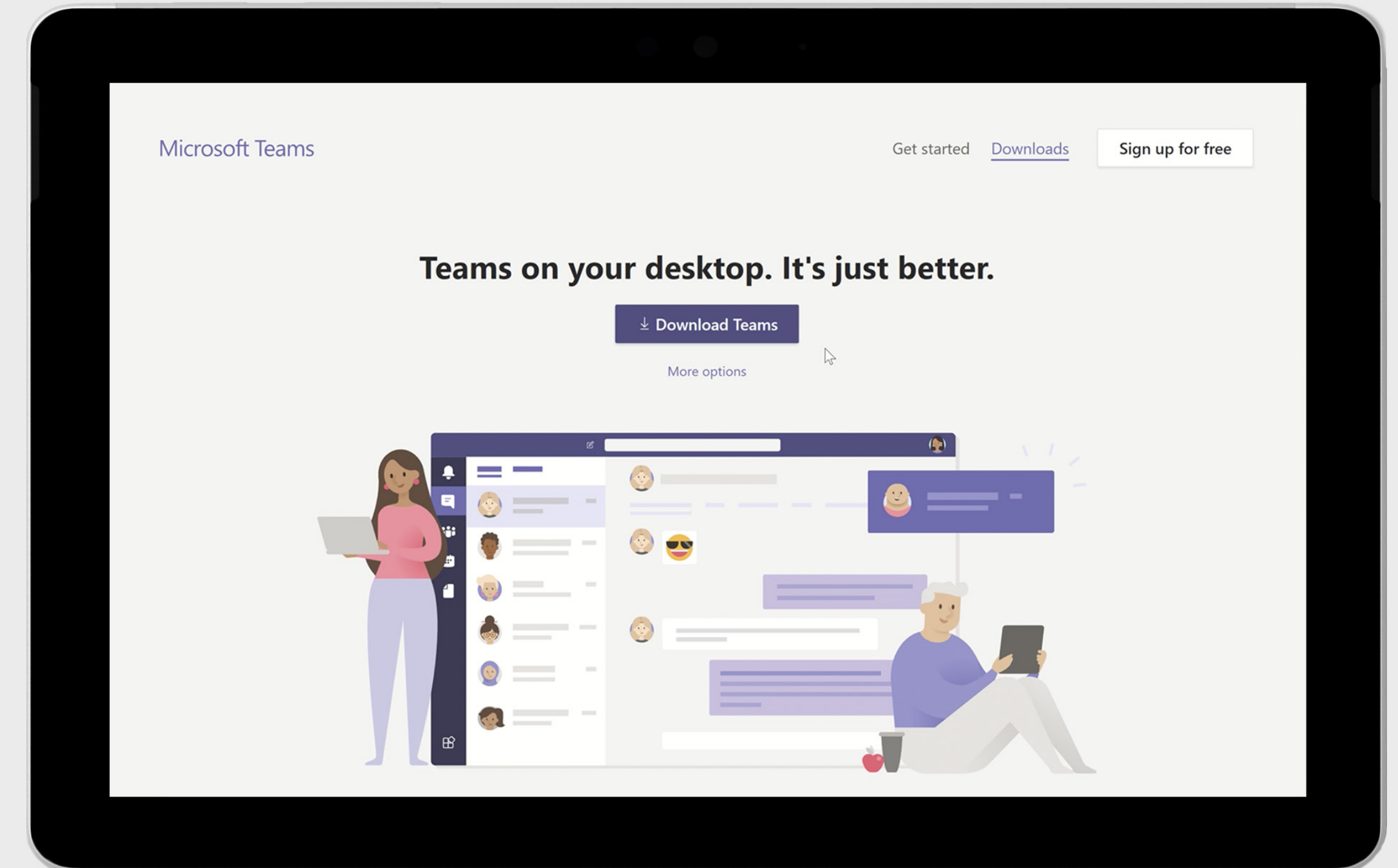
Download the app

Part of what makes Teams so great is that it's always handy. With the Teams app, you can take Teams with you wherever work takes you.

Checklist

Here are a couple things to try:

- ✓ **Download the Teams app.** Get [Teams](#) on your laptop, tablet, and phone.
- ✓ **Remind team members to download the app, too.**



Download Teams for tablets, phones, and all your devices.

Step 3

Pick a project

OK, so you now have your team in Teams, and you're ready to go. Where should you start?

Try picking just one project that your team will commit to working on only in Teams.

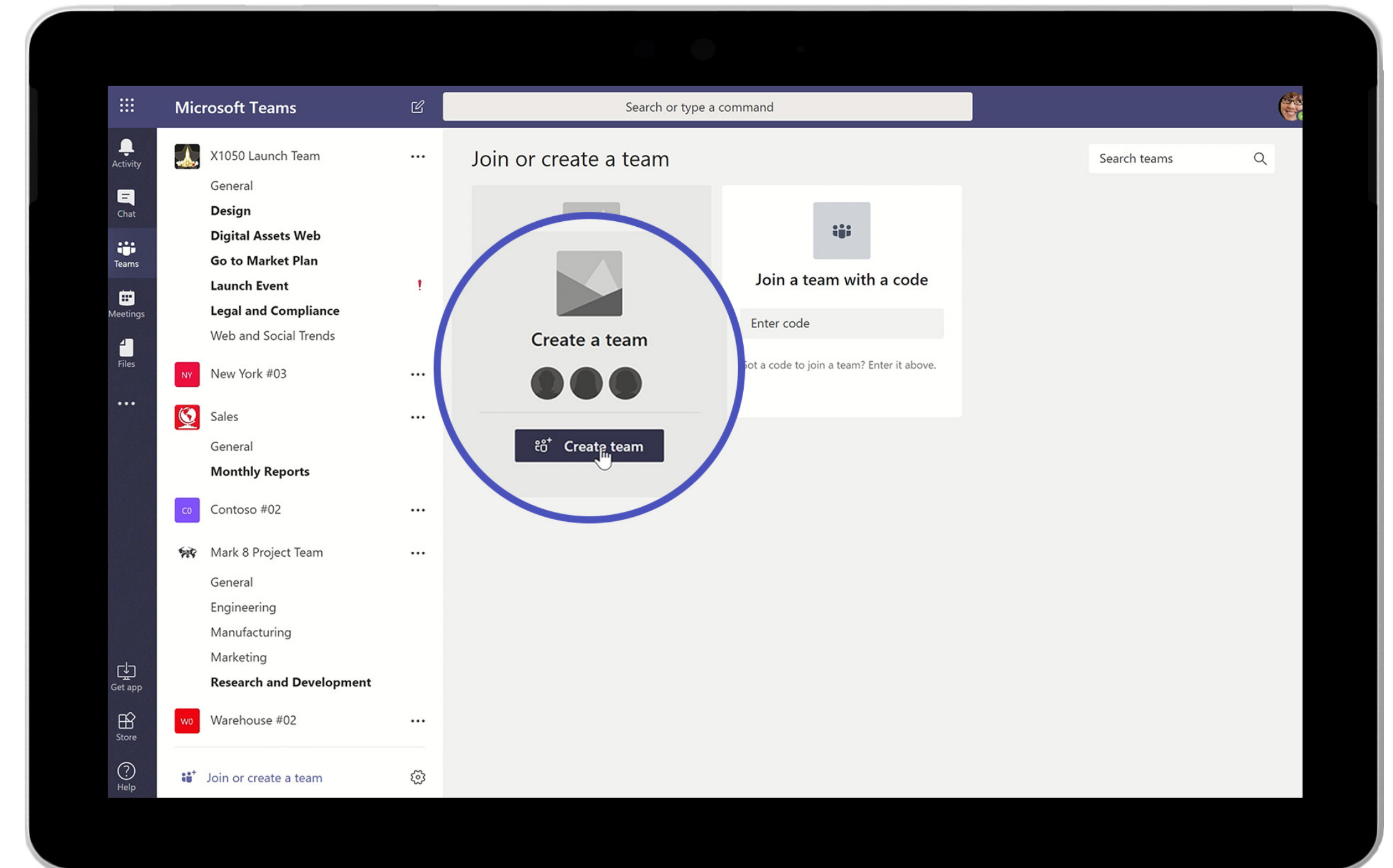
Teams introduces a new way of working, so starting small will help you figure out what works best before you go big.

Not sure which project to start with? Try picking an event your team is planning or a recurring business review with your management.

Checklist

Here are a few things to try:

- ✓ **Create a Team for the project.** Once you pick your project, create a Team and invite the people who will work on it.
- ✓ **Add channels to the Team.** Channels help organize conversations by main project area. For example, for an event planning project, you could add channels for planning tasks, budget, promotion, logistics, speakers, and attendees.
- ✓ **Add project files.** Choose the appropriate channel for your project files and pin the most important ones to the top. Now team members can easily access and edit project documents without having to leave Microsoft Teams.
- ✓ **Join a Team.** Learn from others by joining an existing Team.



Create a Team to bring together everyone working on a project or area.

Pro tip

Check your email inbox for more ideas of where Teams can help. Any email thread with lots of attachments, multiple recipients, or never-ending reply-all conversations is probably also a good candidate.

Step 4

Set up a project kickoff or weekly sync meeting

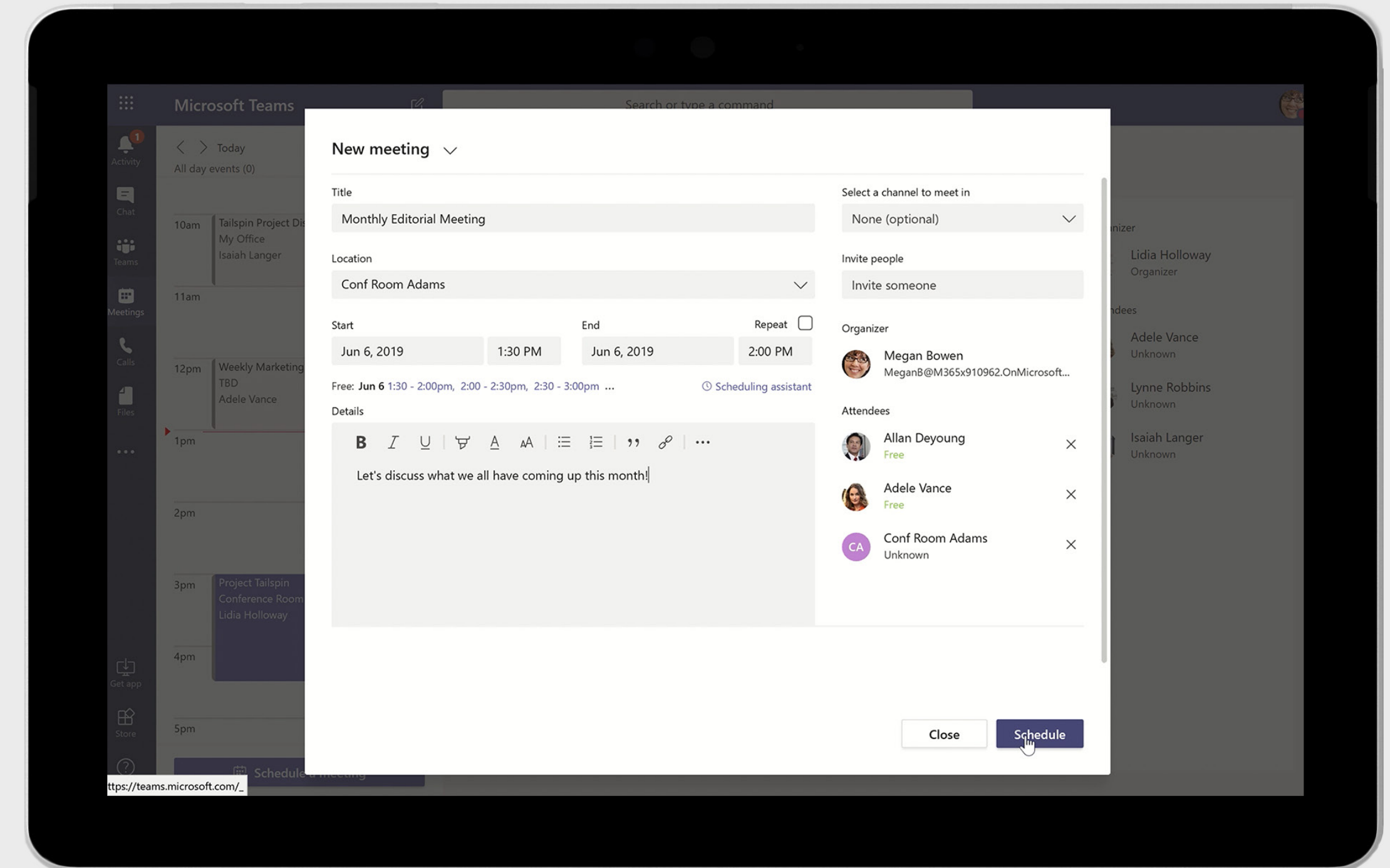
What's a team without meetings? Get everyone together with a one-time or recurring meeting.

Click **Schedule a meeting** in a channel or in **Meetings** on the left side of the app. Click the **Scheduling assistant** to find a time that works for everyone. If the meeting is recurring, click **Repeat**.

Checklist

Here are a few things to try:

- ✓ **Capture notes.** You can easily take notes using the **Meeting Notes** tab.
- ✓ **Record the meeting.** If you record your meeting, the recording is shared automatically with everyone who was invited. Even those who couldn't attend can watch the recording afterward.
- ✓ **Join a meeting from your phone or tablet.** Teams can help you feel connected from anywhere. For example, try joining a meeting from your phone.



Set up a new meeting. See who's available or use the scheduling assistant for help.

Step 5

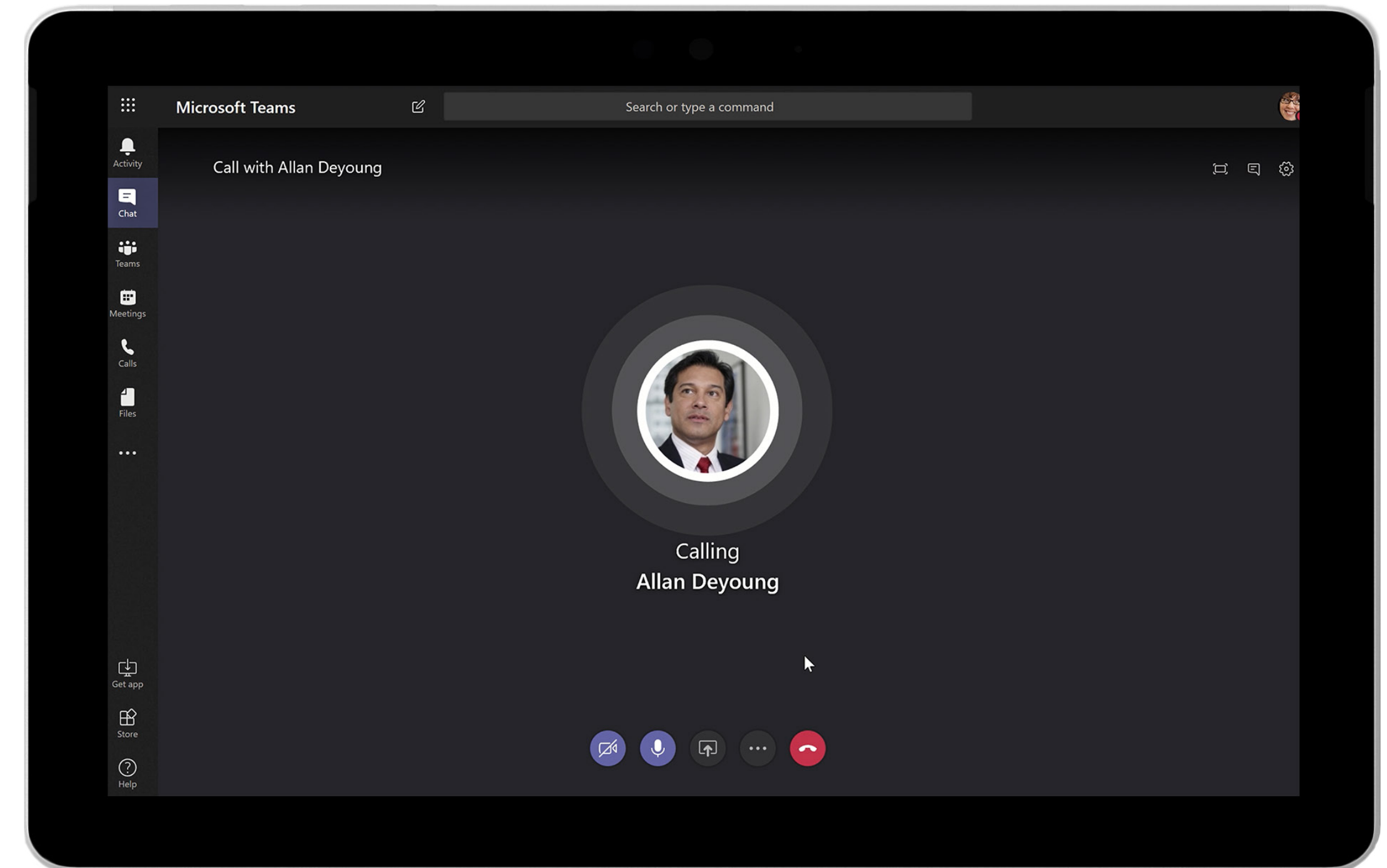
Keep everyone engaged

Use @mentions to get someone's attention. An @mention triggers an email to let that person know they have a specific action or question to answer. This can help your team get used to incorporating Teams messaging into their communications.

Checklist

Here are a couple things to try:

- ✓ **Forward an email to a channel.** Every channel has its own email address. Forwarding an email to a channel can keep the conversation going and ensure that important information is available to everyone.
- ✓ **Start a voice or video call.** Sometimes a quick conversation is all you need to move forward. It's easy to switch from a one-on-one or group chat to a call. Share your screen or use the built-in whiteboard app to work out ideas.



Start a private or group voice or video call from anywhere.



That's it!

Now you know the essentials. Have fun and explore—and you'll start to notice your team creating and collaborating more effectively than ever.

[Sign in to Microsoft Teams now](#)