ENGAGE WITH CLIENTS

Microsoft Teams

ABOUT THIS COURSE

This course is offered as a 2-hour online course focusing on the features in Microsoft Teams that enable you to engage virtually with your clients.

Learn step-by-step how to connect with people external to your organisation, along with top tips on how to schedule and run engaging online meetings as an alternative to meeting face-to-face.

Learners are fully supported during and after the workshop with a quick reference cheat sheet that covers the key things they need to know to get started.

IS THIS COURSE SUITABLE FOR YOU OR YOUR TEAM?

This course is aimed at people who are ready to learn the features that Teams offers for successful online meetings.

This course is definitely for you if:

☑ You want to offer meaningful and engaging online interactions to your clients; an alternative to in-person meetings

☑ You've been using Microsoft Teams for a while and now need structured learning that will fill in gaps, consolidate what you already know, cover best practice, and avoid possible 'gotchas' that many have learned the hard way.

LEARNING OUTCOMES

By the end of this course, you should be able to confidently:

- Navigate and **use Teams**

- Know how to **work** in **the cloud** and understand how its **different** from **working on a server**.

- **Engage** with your **clients online** while remaining professional and personable.

- Use several **types** of **Teams Meetings.**

- Adjust **settings** and options **before and during online meetings.**

- Use the **best practice** for **external meetings** and know the **best etiquette during meetings**.

- **Overcome** common **issues** that arise **during online meetings**.

AVAILABLE AS AN ONLINE LIVE SESSION

We use Microsoft Teams to deliver this live online session. If you would like to follow along with your trainer please ensure you you have access to Microsoft Teams for your organisation. Having a webcam and headphones ensures you can enjoy interacting with your trainer and fellow participants. Please ensure your browser software is up to date too. For the best experience we recommend using Microsoft Chromium Edge or Google Chrome as your browser.

Details on how to connect to the session, along with your quick reference guide will be emailed to you prior to your session.

COURSE PRE-REQUISITES

An understanding of Microsoft® Office 365 would be beneficial but not essential. Learners will require a PC with access to Teams via their Microsoft 365 Premium (or equivalent) subscription with the desktop software installed.

COURSE DURATION AND DELIVERY

Course delivery consists of 2 hours online tuition. The duration is set for a maximum of 8 people. The course is delivered by a certified Microsoft® Office Specialist with over 20 years of experience training Microsoft® products.

COURSE CONTENT

Topics covered in this course include the following:

INTRODUCING MICROSOFT TEAMS
- Introducing Teams
- Understanding the different needs for internal and external audiences
- Navigating and personalising settings and notifications

WORKING ONLINE
- Differences working in Online Apps vs Desktop Apps
- Benefits of working with online documents
- Recommended Browsers

CLIENT ENGAGEMENT
- What is effective engagement for your client?
- Best Practice
- Etiquette Guidelines

MS TEAM MEETING TYPES
- Learn the various types of meetings and when to use them
- Schedule meetings with clients using Teams Calendar and Outlook
- Tips on helpful information to include in your meeting invitation
- Learn how the client experiences your invite.

RUNNING EFFECTIVE MEETINGS

- Set the Meeting Options
- Share your screen and whiteboard
- Spotlight a speaker
- Invite others to join
- Manage Chat and Settings in a meeting
- Record a meeting (if available)

BEST PRACTICE AND ETIQUETTE GUIDELINES

- Setting up and testing your camera and mic
- Getting your lighting right
- Eliminating background noise
- Changing your background
- Tips on professional standards

TROUBLESHOOTING

- A 'checklist' of things to do before a meeting
- Share the 'Join link'
- What it means when the 'Meeting Ending Soon warning' is displayed
- Working with a poor internet connection
- What to do when you or your client are disconnected

WHAT PEOPLE ARE SAYING ABOUT THE COURSE

"FANTASTIC"

Thanks again for a fantastic series of MS Teams training sessions. We will most definitely use Excel at Work again – you were brilliant Susan!

Ange Brooking - Learning and Development Specialist

"REALLY ENGAGING"

An absolutely amazing trainer! Really engaging and able to relate to trainees.

Andre Nair - HSEQ Manager

GET IN TOUCH WITH US

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