Teams Pills

Lesson 7

Teams as a Platform

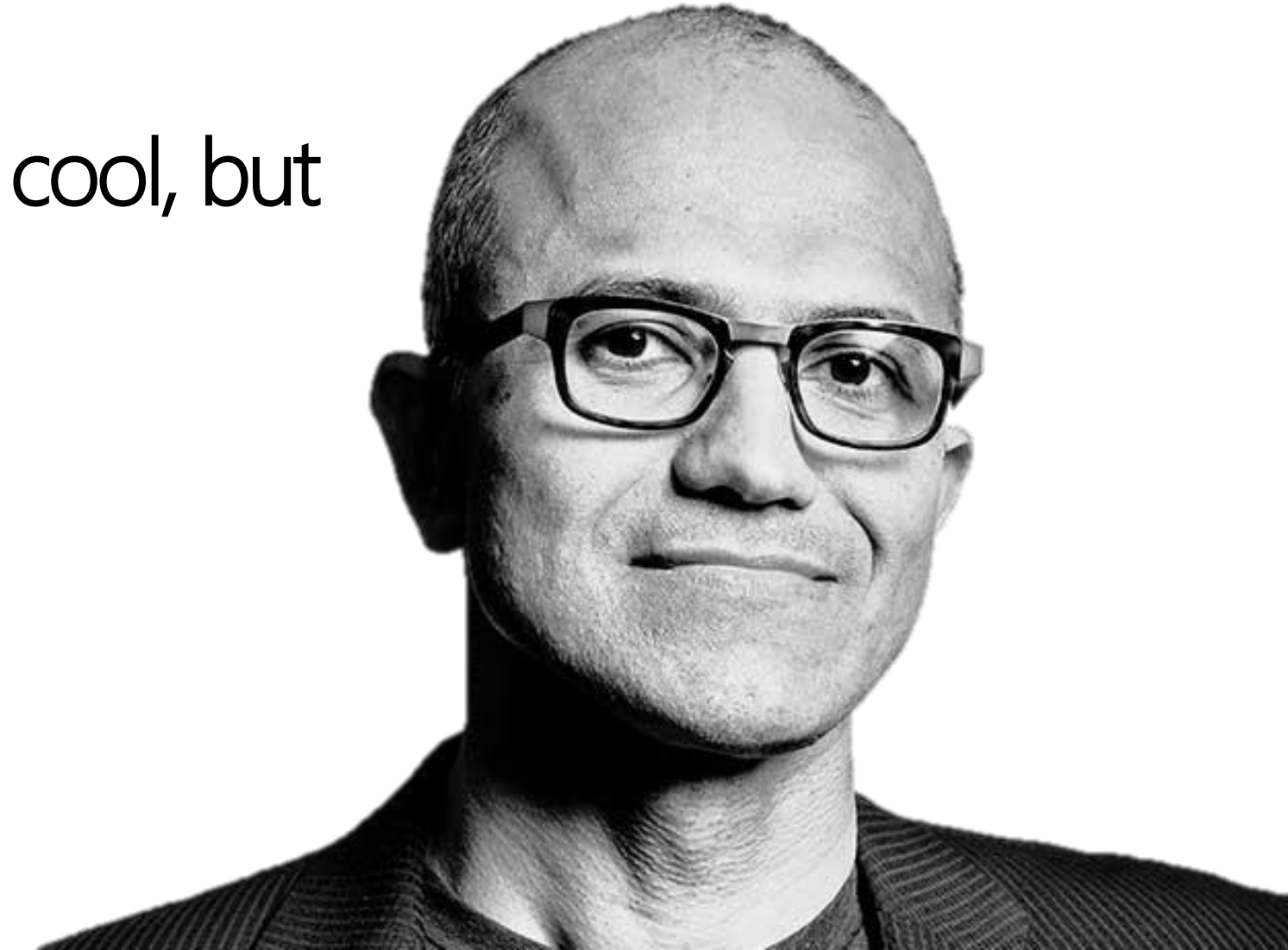
Microsoft

Teams Pills
Teams as a Platform

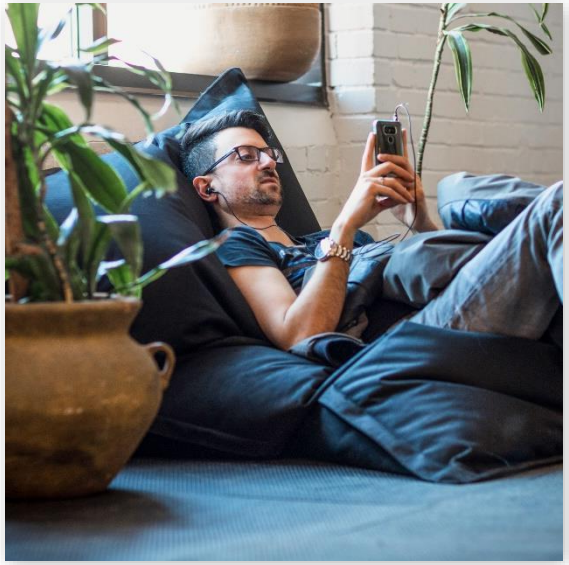
Daniela Esposito – SR. Customer Success Manager – Modern Workplace

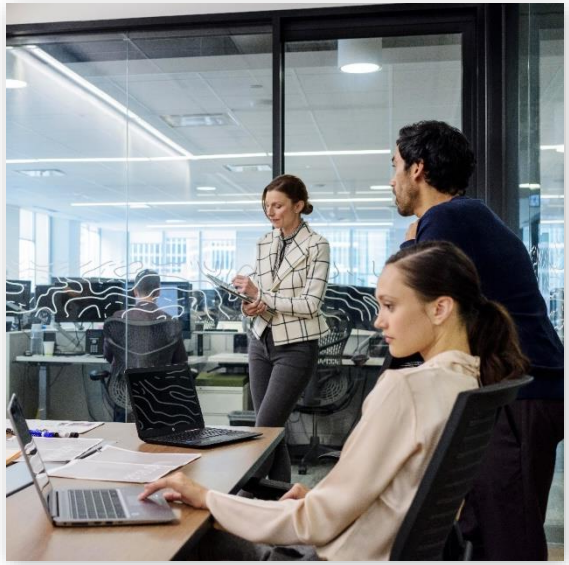
"You join here not to be cool, but to make others cool."

Satya Nadella, 2019



The reality of the “modern” workplace





We changed the expectations about mobility, smart working and distributed teams

67%

of workers have jobs that require them to work with colleagues in other locations

71%

percent would like to have a centralized place to see all work across the company

69%

percent indicated they don't have that type of solution in place today

77%

percent of the workforce reports they want to work from home after the COVID-19 passes

Imagine a world where you can…

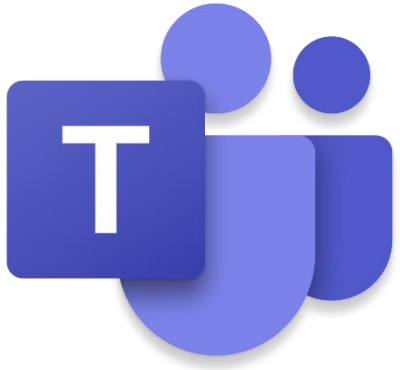
Integrate business processes

Automate routine tasks

Access the custom apps you already use

Communicate and collaborate

All in a single **hub**



Microsoft Teams

Microsoft Teams

The hub for teamwork in Office 365

Communicate

through chat, meetings & calls

Collaborate

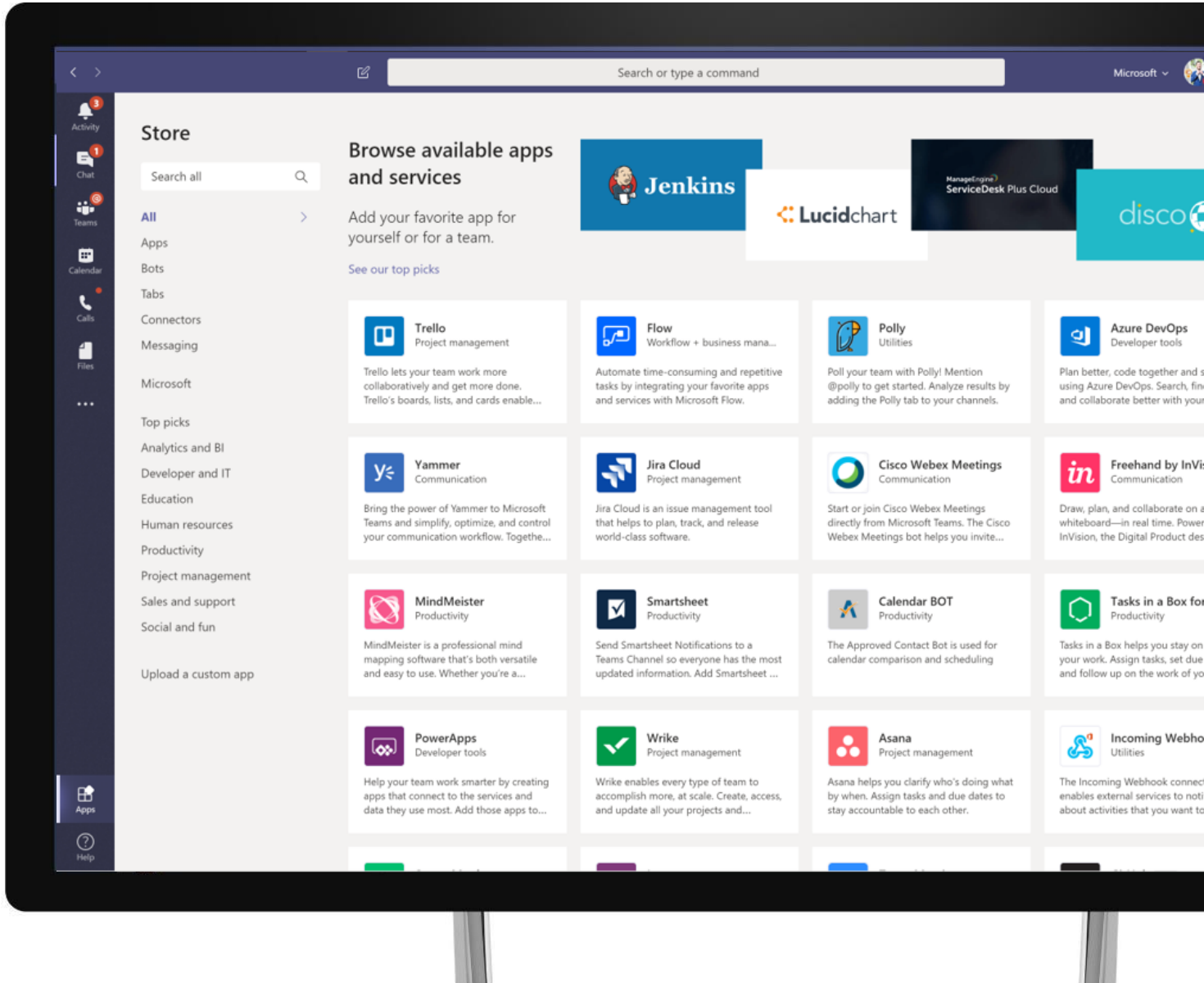
with deeply integrated Office 365 apps

Customize & Extend

with external apps, automation, process flows, and custom apps

Work with confidence

enterprise level security, compliance, and manageability



Meet your people where they already are

Custom Apps

Vertical solutions

Healthcare

Manufacturing

Retail

Banking

Organization-based applications

Departmental tools

Employee resources

Support & info

Processes & workflow

Ready to use

Partner applications

Polly.ai

Trello

GitHub

Adobe

Wrike

Jira Core

servicenow

Office 365 applications

Why do you want to build for Teams?

Teams is the fastest-growing business app in Microsoft history

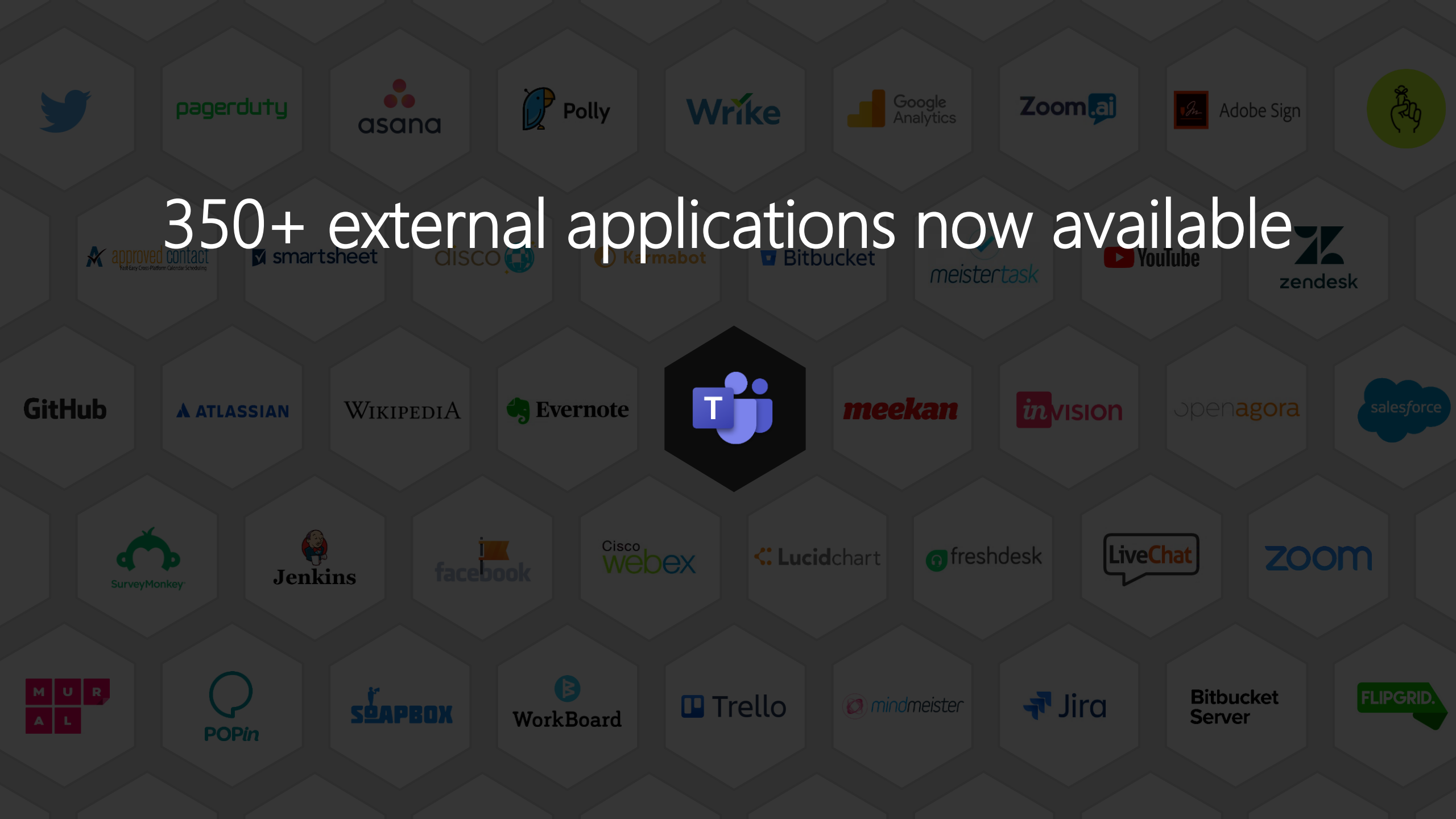
75M
daily active Teams users

181
countries around the world

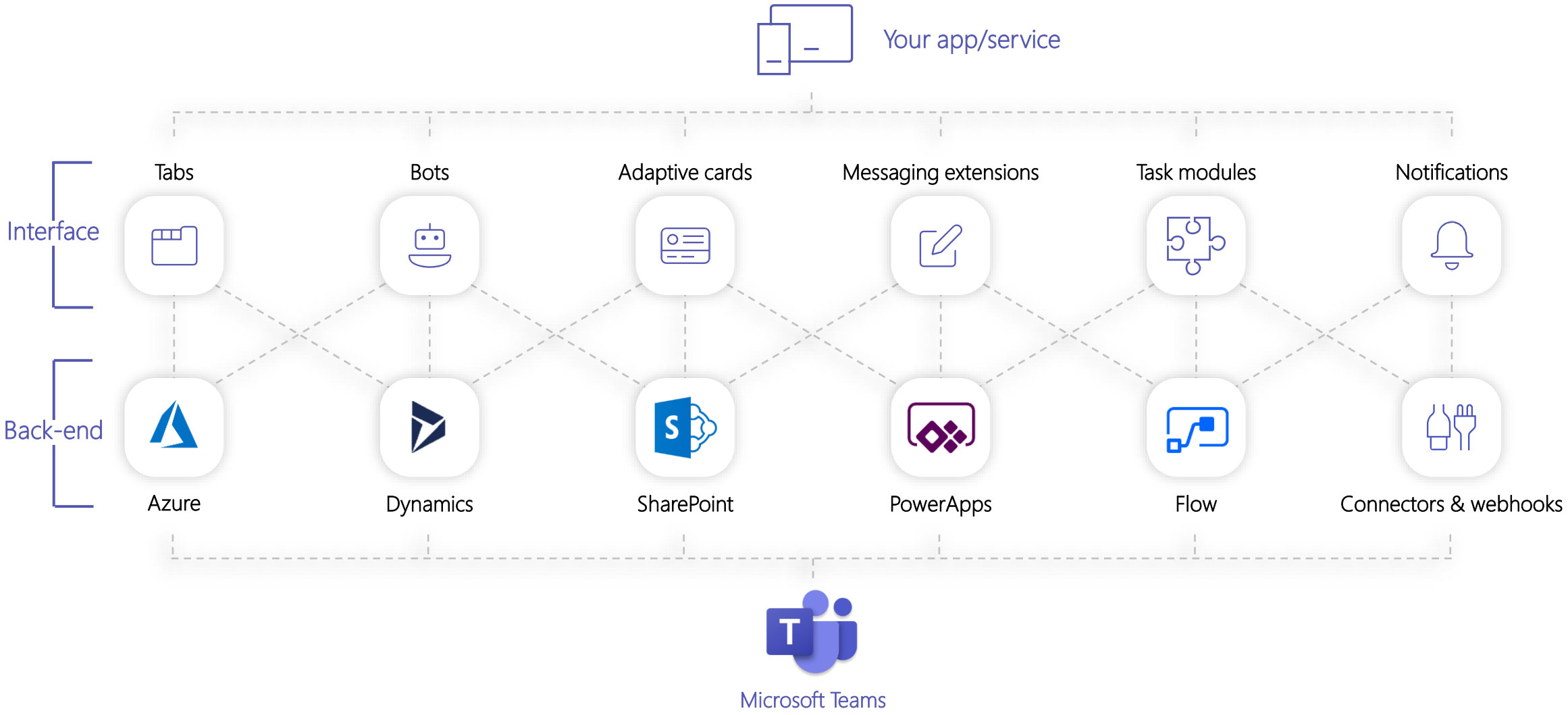
93%
Fortune 100 companies using Teams

650
organizations have 10,000 or more active Teams users

350+ external applications now available



Bring your existing solution to life



Business Scenarios

- Digitize sales cycle
- Streamline team activities
- Simplify HR requests
- Loan requests intake process

Digitize sales cycle

Powered by Microsoft Dynamics 365 for Sales, Teams, Azure, Power BI, Forms

VALUE PROPOSITION

Digitalize end customer engagement model taking **full advantage of all the collaboration and security features of Teams, Dynamics, PBI, powered by Azure Bot.**

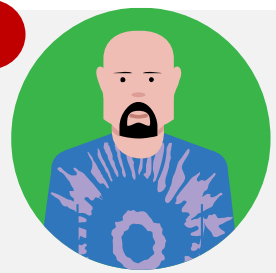
1

Andrea

Customer

Andrea, is a small business owner. Books a remote meeting with his advisor, Sara.

2



Andrea

Customer

Sara

Advisor

Sara and Andrea get on Teams and meet remotely. Personal ID is verified and captured via a bot.

3

Sara

Advisor

Sara converts the meeting into an opportunity because she would like to start developing an offer.

4

Giorgio

Manager

Giorgio approves and can review all KPI and monitor advisor's performance directly in Teams.

Streamline team activities

Powered by Microsoft Dynamics 365 PowerApps and Teams

VALUE PROPOSITION

Bringing together multiple sellers to collaborate on sales opportunities, leveraging Dynamics 365 served via Microsoft Teams.

1

Luca

Sales Rep

Luca creates a new sales opportunity in Dynamics and pins Dynamics record in Teams.

2

Giulia

Sales Team

Giulia and Luca collaborate. Files added to D365 will appear in Teams and vice versa.

3

Mario

Sales Manager

Right within Teams, Mario receives the approval request and has real time access to D365 Dashboards

Streamline team activities

Powered by Microsoft Dynamics 365 PowerApps and Teams

VALUE PROPOSITION

Bringing together multiple sellers to collaborate on sales opportunities, simplifying the updating process of the opportunities integrated into the sales collaboration hub

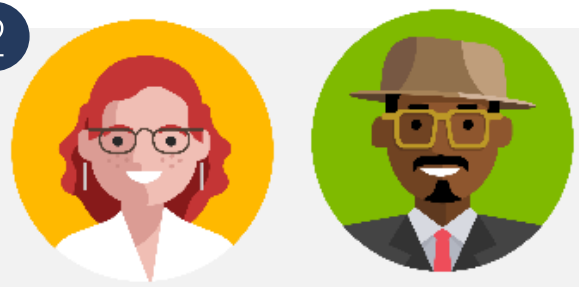
1

Luca

Sales Rep

Luca open the app pinned into Sales team Teams. He can create a new record or update an opportunity

2



Sales Team

Giulia and Luca can easily collaborate exchanging experiences and files. A dashboard can support the team to give visibility to their manager

3

Mario

Sales Manager

Right within Teams, Mario receives can check in real time to team Dashboards and can act

Simplify HR requests

Powered by Microsoft Dynamics 365 for Sales and Teams

VALUE PROPOSITION

Viewing and requesting time away from work directly into Microsoft Teams interacting with an Azure bot and simplify the access to D365 HR, the request is then automatically sent for approval

1

Giulia

Contoso Employee

Using MS Teams Giulia use the HR bot to view, ask, edit her time off

2

Bot

HR Bot

The Bot understands Giulia requests and help her to quickly set, review, and send her request for approval directly into Teams

3

Giulia

Contoso Employee

Using the Bot Giulia can confirm or edit the request, when she is ready se can submit the request

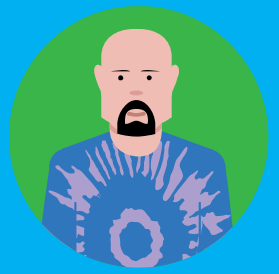
4

Mario

Giulia's Manager

Using D365 HR Mario can review approve or rejects Giulia requests

Microsoft
Loan requests intake process
Program for Small Business
powered by Teams as a Platform



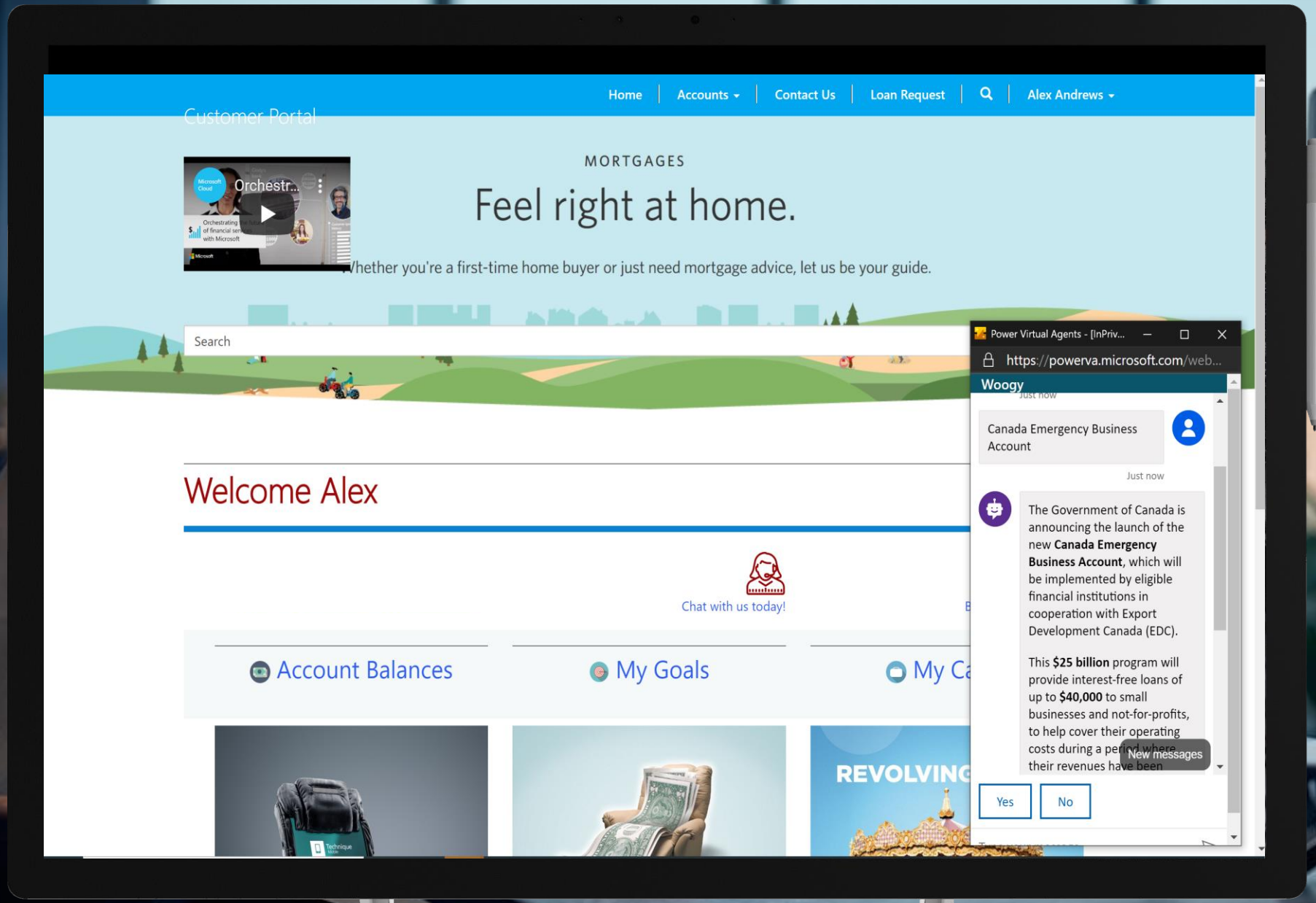
Alex

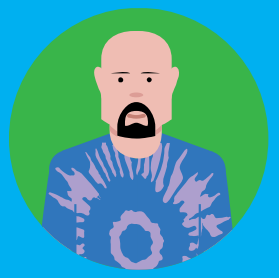
Customer

Alex, is a small business owner that is looking for details about Contoso Accelerator program.

Alex logs into his financial institution portal and uses Virtual Agent Bot to get more details and to see if his business is eligible for a loan.

Powered by Microsoft Power App Portal and Power Virtual Agent





Alex

Customer

Alex, interacts with the bot that provide the details of the program and helps him to verify his eligibility

Powered by Microsoft Power Virtual Agent

Power Virtual Agents - [InPriv...

https://powerva.microsoft.com/web...

Woogy

up to **$40,000** to small businesses and not-for-profits, to help cover their operating costs during a period where their revenues have been temporarily reduced, due to the economic impacts of the COVID-19 virus.

More detail can be found here: Support for Canadian Businesses

I can let you now if your business qualifies for the CEBA, I just require some basic information about your business.?

Is that ok?

Just now

Yes | No

Lunch with Eric
Café
11:00 AM-12:00 PM

10 2

Power Virtual Agents - [InPriv...

https://powerva.microsoft.com/web...

Yes

Just now

Do you have a business that is registered in Canada?

Just now

Yes

Just now

Was your annual payroll between $50,000 and $1M for 2019 (Based on T4SUM Summary of Remuneration Paid)?

Just now

Yes

New messages

Just now

Yes | No

Type your message

Power Virtual Agents - [InPriv...

https://powerva.microsoft.com/web...

Just now

Do you currently bank with Woodgrove Bank? This means that your business uses a WG Business Operating Account (Opened before Mar 1, 2020).

Just now

Yes

Just now

Your business qualifies for the Canada Economic Business Account.

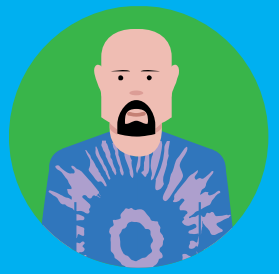
Please use the following link to create a request and someone will be with you shortly.

CEBA Request

New messages

Yes | No

Type your message



Alex

Customer

Fortunately, Alex's business is eligible, so he goes ahead and creates new loan request under this program.

Powered by Microsoft Power App Portal

Loan Request Edit

Chat with us today!

Book an Appointment

General

Business Details

Application Name *
COVID-19 Business Loan

Business Name
Object Edge

Business #
451-768-90-BE

Industry
Accounting

Annual Revenue
$ 5,000,000.00

Contact Info

Existing Customer
Alex Andrews

First Name
Alex

Last Name *
Andrews

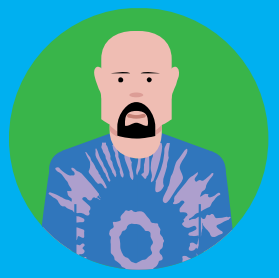
Phone Number
416-456-6565

E-mail
crmuserimaslam2@yahoo.com

Loan Details

Program

Request Date



Alex

Customer

Right within portal, Alex can upload all supporting documents and provide all necessary information.

Powered by Microsoft Power App Portal

Loan Details

Program
CEBA

Request Date
4/6/2020

Requested Amount
$ 40,000.00

Loan Type
Secured

Purpose of Loan
Payroll, Expenses

Mode of Payment
Standing Order

Term
12 Months

Collateral
Receivables, Assets

Banking Details

Do you currently have a business account?
No Yes

Business Operating Account
No Yes

Business Savings Account
No Yes

Required Documents

3 Months Bank Statement
No Yes

Balance Sheet
No Yes

Note Text
There are no notes to display.

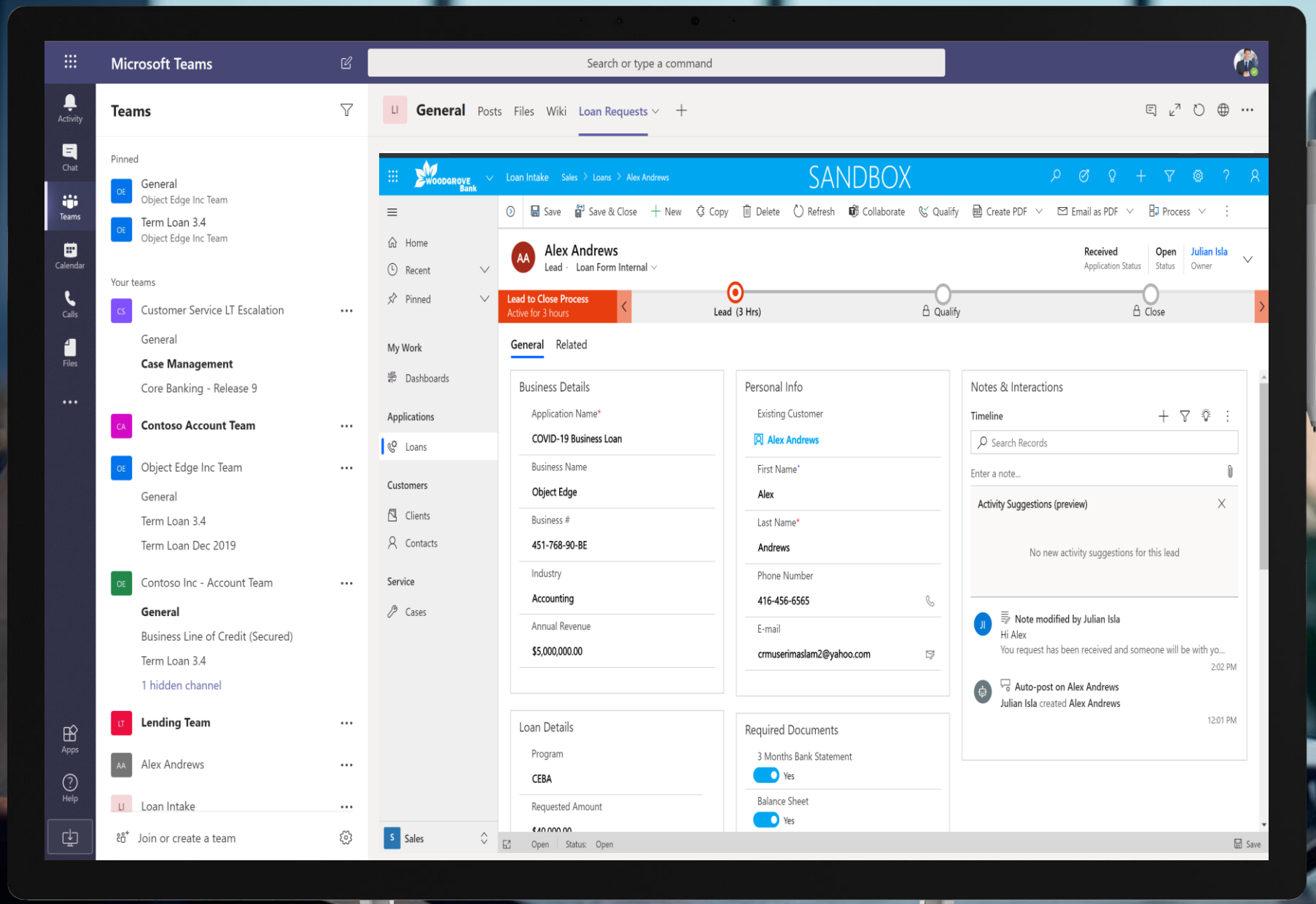
Karen

Advisor

Alex's loan request gets created and intelligently routed to the right team.

Karen gets assigned the application and follows the business process to complete the loan request.

Powered by Microsoft Dynamics 365 and Teams



Karen

Advisor

Collaborate using Teams and never be disconnected with your back-end.

Powered by Microsoft Dynamics 365 and Teams

Microsoft Teams

Search or type a command

Activity
Chat
Teams
Calendar
Calls
Files
Apps
Help

Teams

Pinned

General
Object Edge Inc Team

Term Loan 3.4
Object Edge Inc Team

Your teams

Customer Service LT Escalation
General
Case Management
Core Banking - Release 9

Contoso Account Team

Object Edge Inc Team
General
Term Loan 3.4
Term Loan Dec 2019

Contoso Inc - Account Team
General
Business Line of Credit (Secured)
Term Loan 3.4
1 hidden channel

Lending Team

Alex Andrews

Loan Intake

Join or create a team

General Posts Files Wiki Loan Requests

Show Chart | New | Refresh | Collaborate | Delete | Email a Link | Flow | Run Report

Loan Requests

Quick find

Group By: (no grouping)

Topic	Business Name	Customer	Program	Requested Amount	Loan Type	Application Status	
Business Loan	Object Edge BC	---	CEBA	$30,000.00	Unsecured	Inprocess	4/
Canada Emergency Busin...	Microsoft	---	CEBA	$20,000.00	Secured	Inprocess	4/
Canada Emergency Busin...	Consolidated Mes...	---	CEBA	$30,000.00	Secured	Inprocess	4/
CEBA	Alpine Ski House	---	CEBA	$40,000.00	Unsecured	Received	4/
CEBA Loan	Object Edge NB	---	CEBA	$40,000.00	Unsecured	Inprocess	4/
COVID-19 Business Loan	Object Edge	Alex Andrews	CEBA	$40,000.00	Secured	Received	4/
COVID-19 Loan	School of Fine Art	---	CEBA	$30,000.00	Unsecured	Approved	4/
COVID-19 Loans	Ontario Research ...	---	CEBA	$40,000.00	Unsecured	Approved	4/
Emergency Business Loan	Tailspin Toys	---	CEBA	$40,000.00	Unsecured	Additional Details...	4/
Emergency Loan	Object Edge Inc	---	CEBA	$40,000.00	Unsecured	Inprocess	4/
Expenses Loan	Unbounce Inc (S...	---	CEBA	$40,000.00	Unsecured	Additional Details...	4/
Pay for Imports	Wide World Impo...	---	CEBA	$35,000.00	Unsecured	Additional Details...	4/
Pay Payroll	Wingtip Toys	---	CEBA	$30,000.00	Unsecured	Additional Details...	4/

Page 1

All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

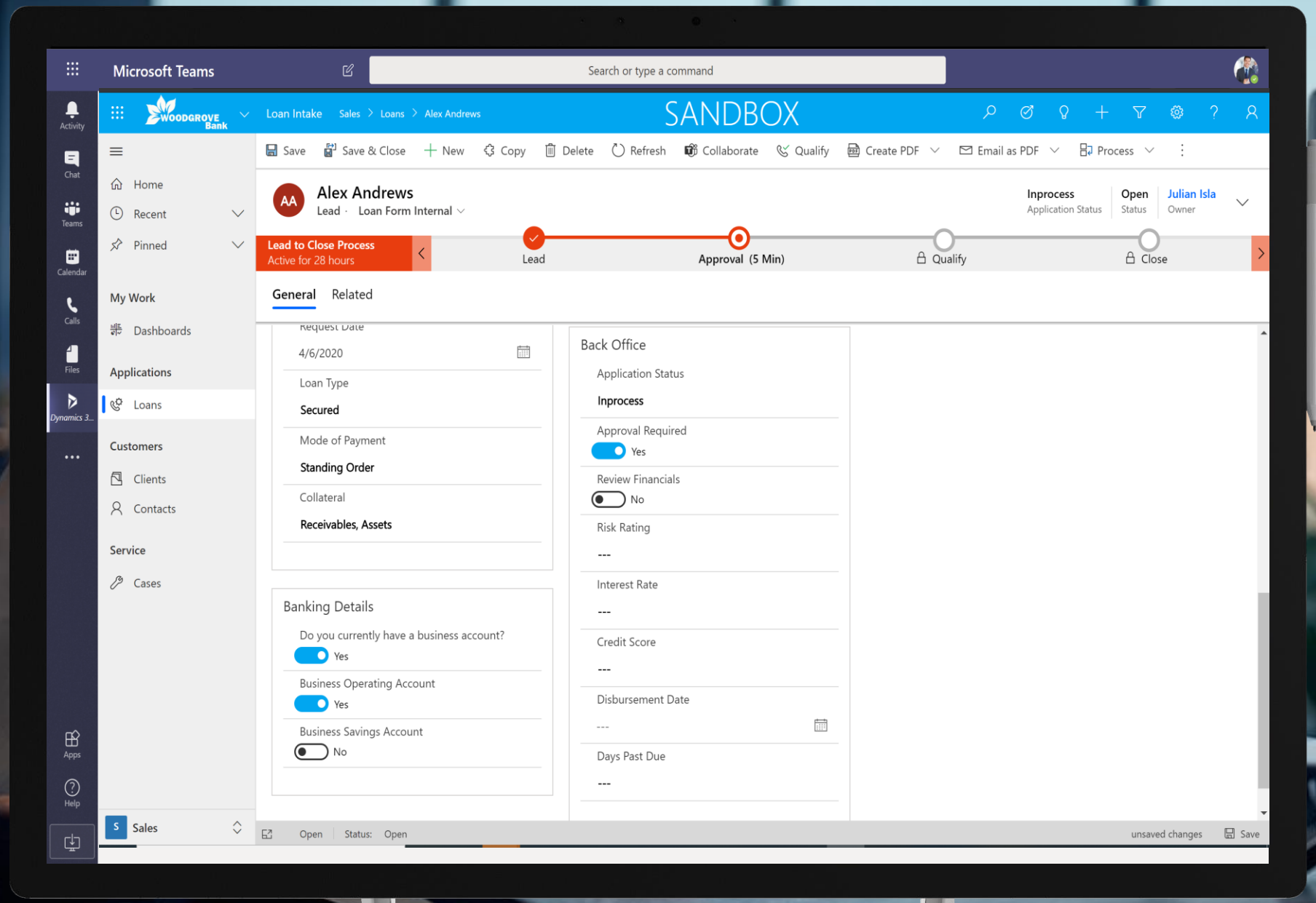
Karen

Advisor

Based on Alex's loan application details, Karen understands that additional approval is required.

Approval request gets automatically generated and sent over Teams to designated approver - Jeff

Powered by Microsoft Dynamics 365 and Teams



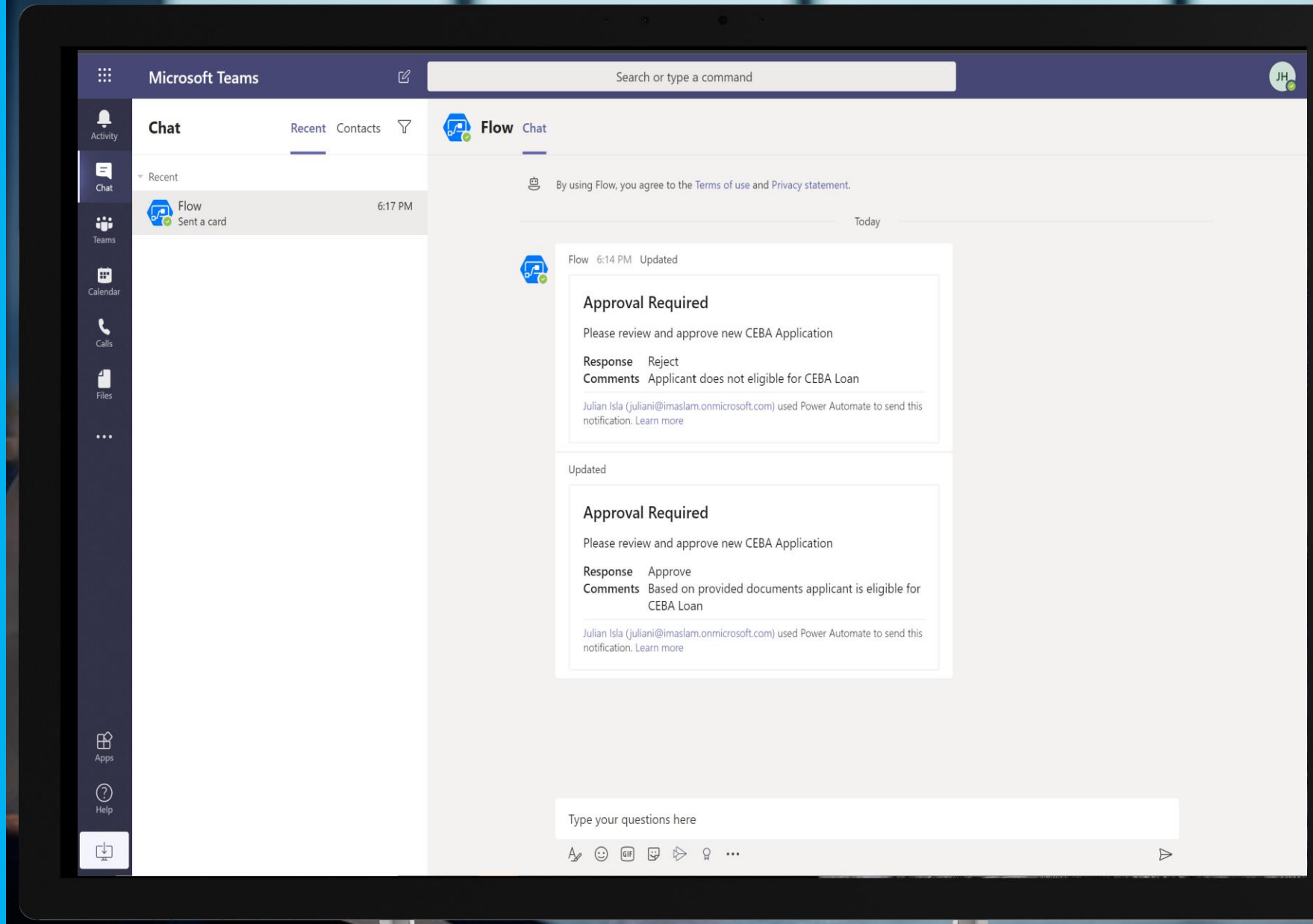
Jeff

Manager

Right within Teams, Jeff receives the approval request and approves the application to move forward.

Jeff provide all necessary comment inside the approval response.

Powered by Microsoft Teams and Power Automate

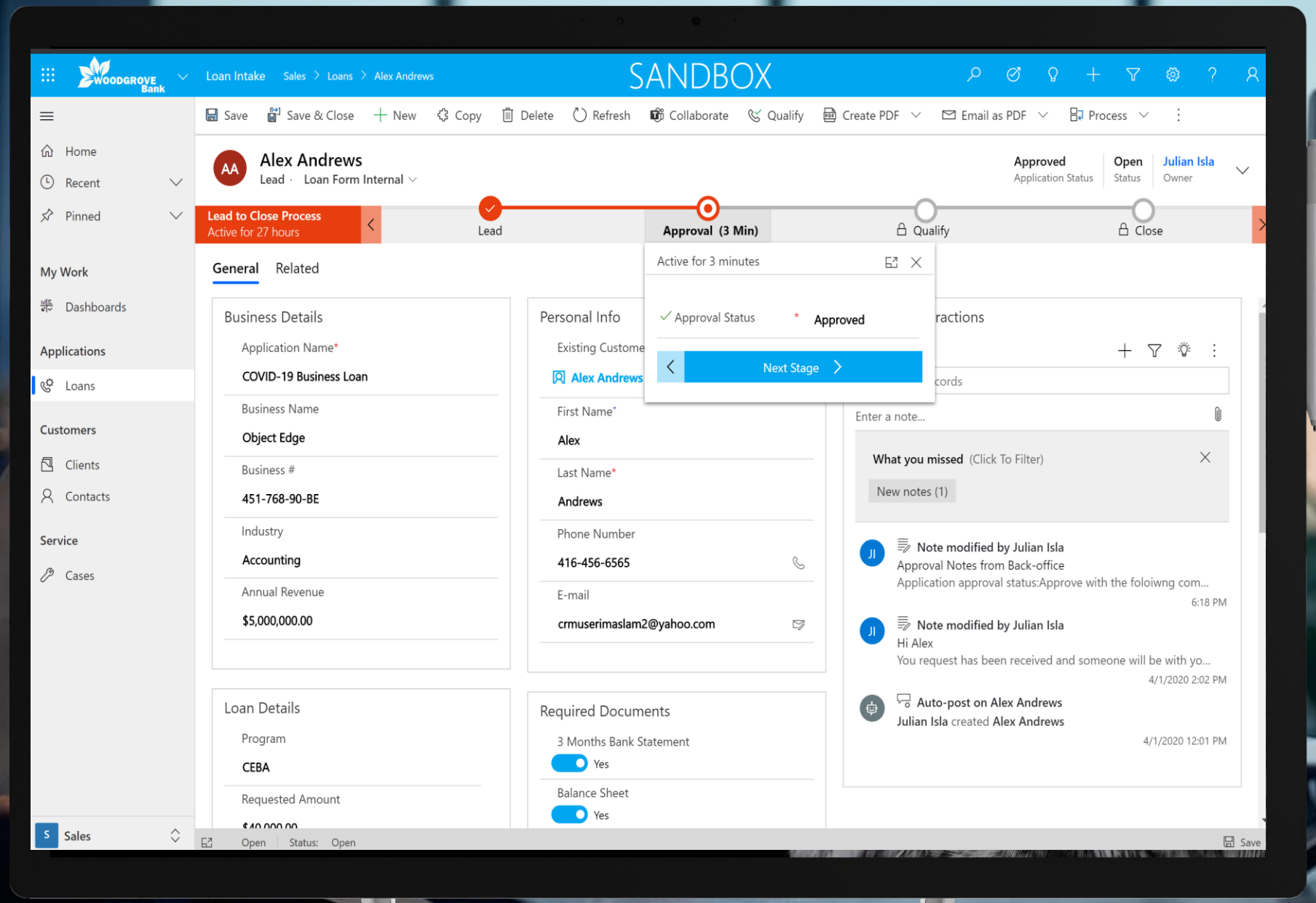


Karen

Manager

Once approval is received, Karen can go ahead and send it to back office for professing.

Powered by Microsoft Dynamics 365



Christa

Manager

Christa has access to real-time loan intake dashboard. She can review all KPI and monitor advisor's performance from right within teams.

Powered by Microsoft Dynamics 365, Teams and Power BI

Microsoft 365

Link Utili e Community

Distribute your Microsoft Teams app

Resta sempre aggiornato con le ultime news di **Microsoft 365:**
https://www.microsoft.com/microsoft-365/partners/

Scenari di utilizzo di **Teams** per ogni specifica **Industry**
https://www.microsoft.com/microsoft-365/partners/teamwork

Area dedicata alla practice su Teams
https://www.microsoft.com/microsoft-365/partners/teamwork

Accedi alla community di **Microsoft 365**:
https://www.microsoft.com/microsoft-365/partners/community

Visita l'area **Partner Hub** dedicata all'Italia:
https://aka.ms/Italy_Partner_Hub

Iscriviti alla **Partner Newsletter:**
https://aka.ms/Italy_MPN_News

Visita **la Microsoft Partner Zone** per tutte le ultime notizie, gli eventi e la formazione nella tua zona.
https://www.microsoftpartnercommunity.com/t5/Italy-Partner-Zone/ct-p/ITPZ

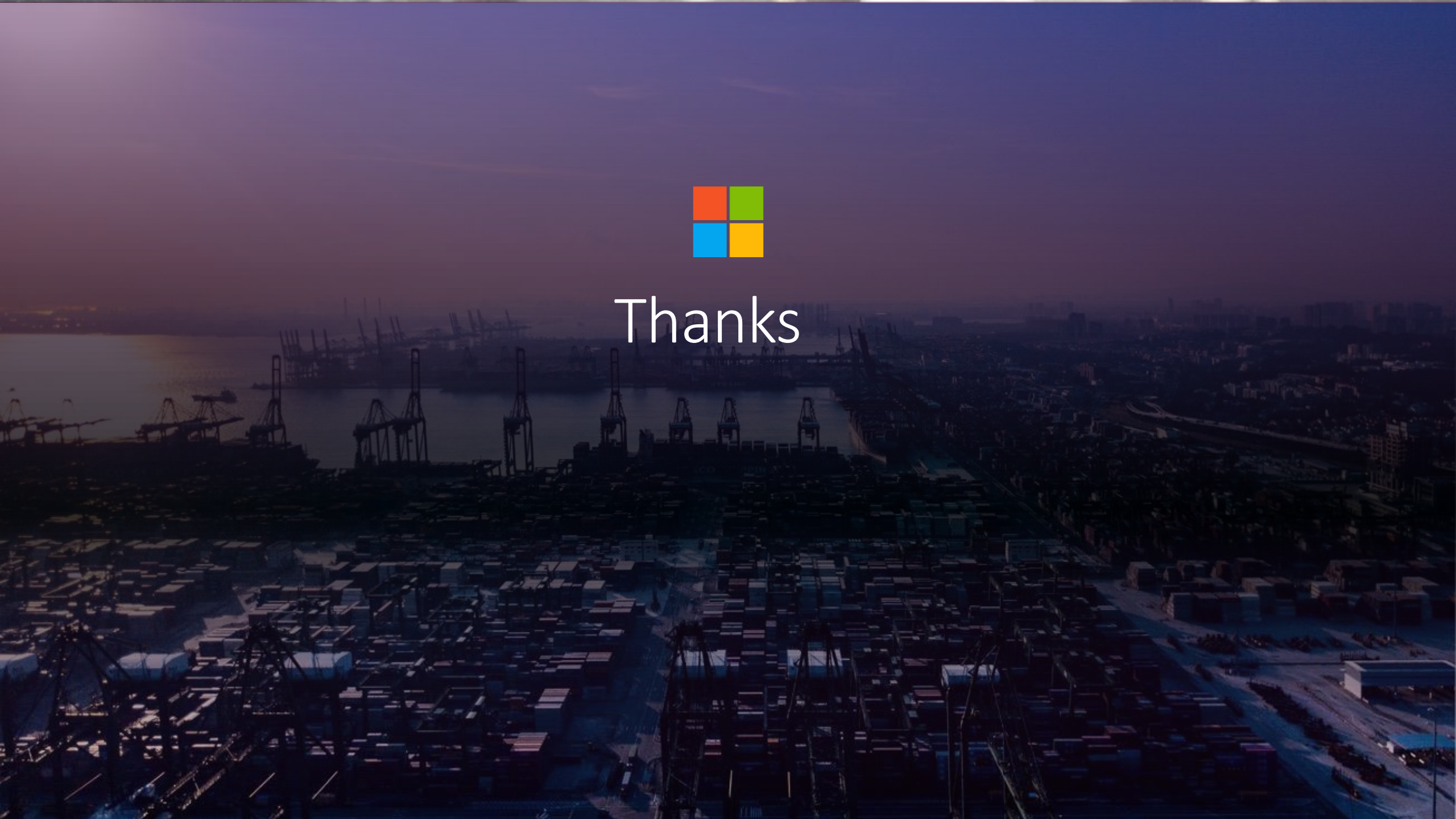
Microsoft 365 Roadmap
https://www.microsoft.com/en-us/microsoft-365/roadmap?filters=

Visita il **Partner Training Calendar:**
https://www.microsoft.com/it-it/partner-training/default.aspx

Microsoft 365

Next Session – 17.06.2020
Licensing

Come rendere disponibile Teams alle organizzazione di tutte le dimensioni



Thanks