



**STEAM Computer**  
A Division of STEAM Executive

# Crash course in Microsoft Teams:

How nonprofit staff can work better together





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Modernize teamwork  
for your nonprofit



## Introduction

As nonprofit organizations look for new ways to drive innovation, they naturally look to technology.

This crash course will show you how Microsoft Teams, included as part of Microsoft 365, can enhance your nonprofit's ability to communicate and collaborate.

Teams brings together the tools and resources a high-performing organization needs. It integrates meetings, messaging, and calling services—plus the familiarity and power of Office apps—into a single, secure hub.

**Ready to let Microsoft Teams modernize teamwork for your nonprofit?**





01.

# Communicate with anyone





## Stay in sync



### Connect one-on-one or in group chats

As work styles become more and more diverse, communication challenges arise. With Microsoft Teams, people can choose how to communicate—in private one-on-one chats, group chats, or broader conversations that are visible across the team.



### Converse with context

Nonprofit organizations are dynamic. Members, roles, priorities, and goals change, which can make tracking communication threads difficult. Microsoft Teams maintains a history of communication that's independent of people coming and going. Chats are threaded, which means replies to a post stay grouped with the original post. This makes it easy to track or catch up on multiple conversations in a single channel.



### Share information with transparency

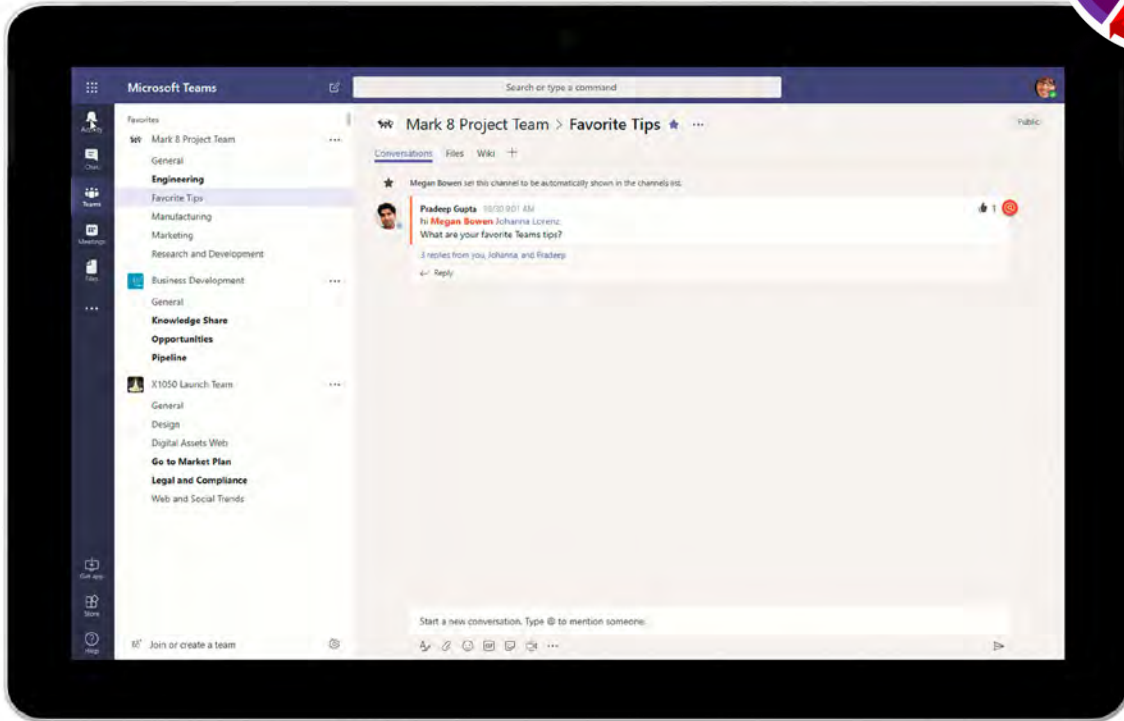
Increased visibility of communications can transform the culture of a nonprofit team and help employees, volunteers, and outside experts work better together. In Microsoft Teams, discussions in channels keep things organized and in context, as well as make it easier to access and share information.



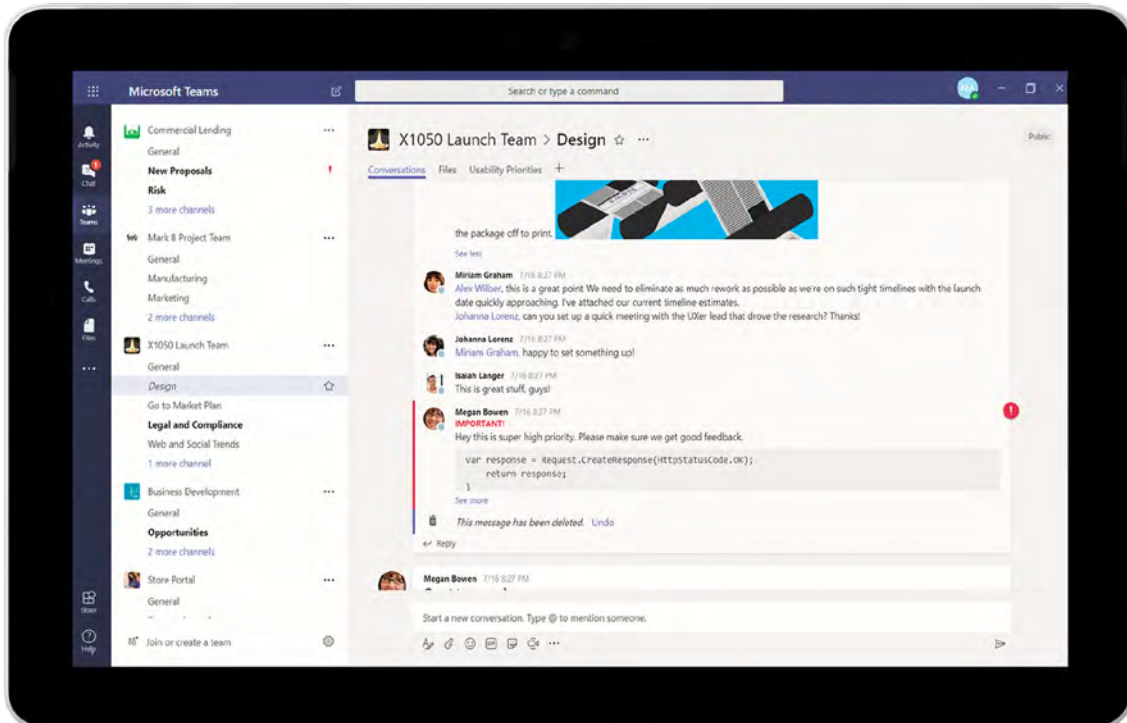
### Work with virtually anyone

Guest access through Microsoft Teams enables easy collaboration with contacts outside your organization by granting them access to existing teams and channels. People with a business or consumer email account, such as Outlook or Gmail, can participate as a guest in Teams with access to team chats, meetings, and relevant files.

# Crash course in Microsoft Teams: How nonprofit staff can work better together

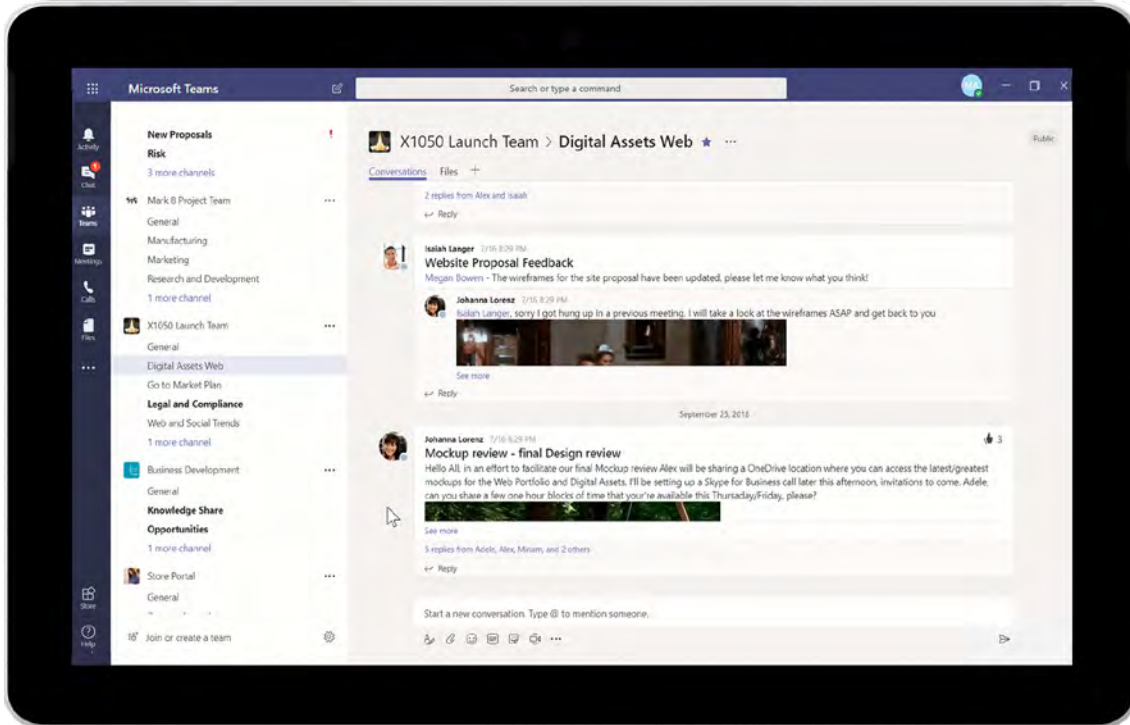


Connect one-on-one or in group chats

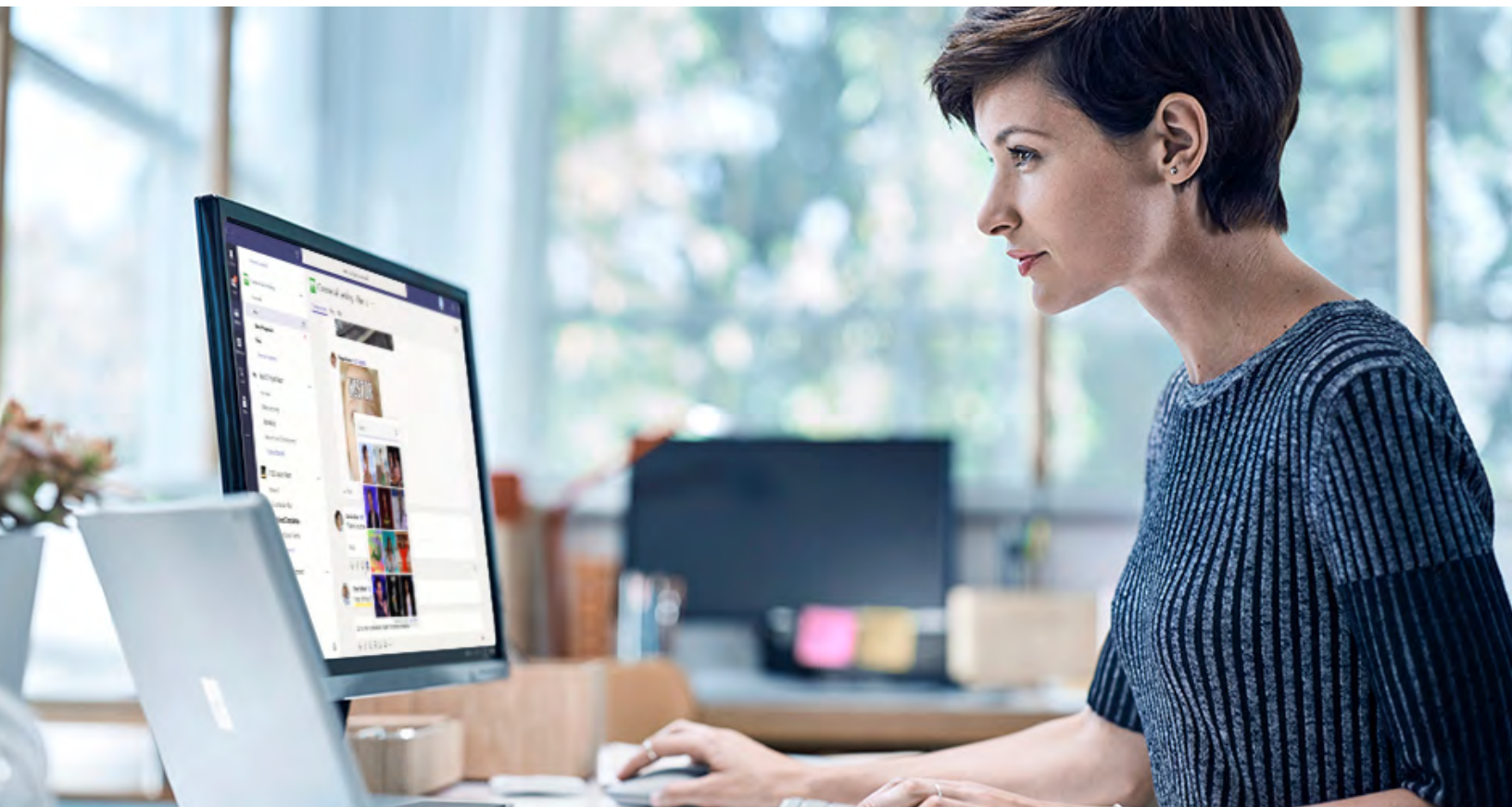


Converse with context in channels

# Crash course in Microsoft Teams: How nonprofit staff can work better together



Keep project-specific conversations and files organized using tabs





## Make meetings more productive

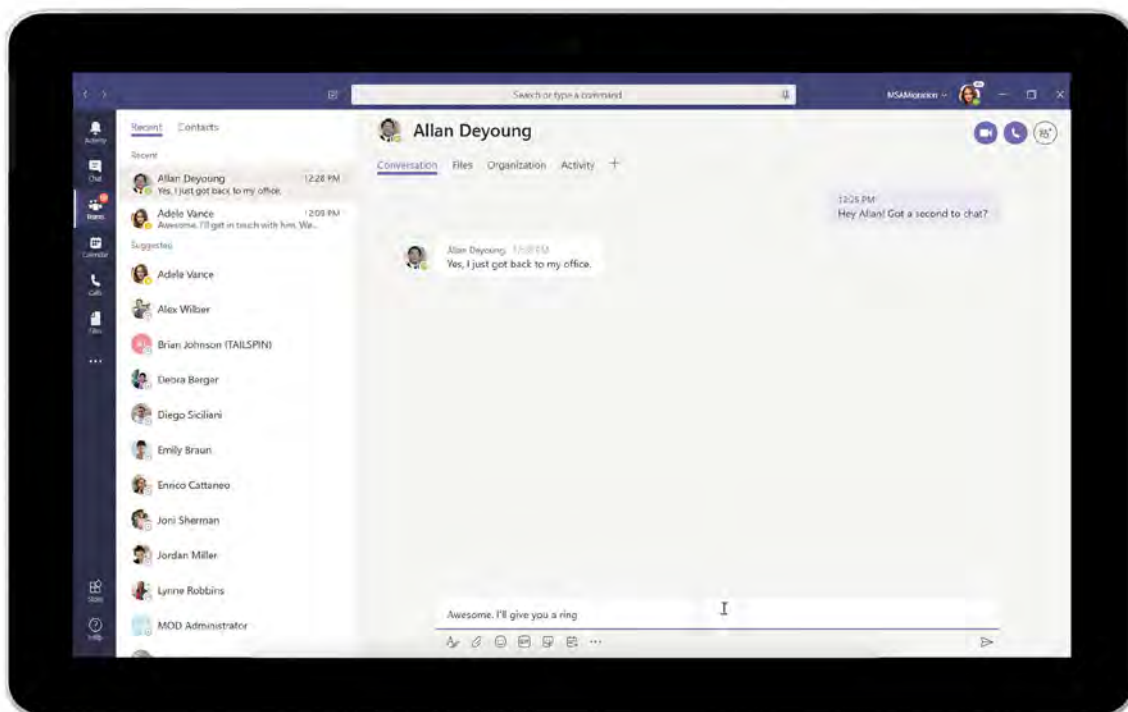
### Communicate from nearly anywhere, in any style

Microsoft Teams provides a wide range of communication opportunities for spontaneous, scheduled, or formal meetings. From a quick chat with a colleague to a team-wide presentation, meetings can be launched with one click to enhance team collaboration.

### Record, transcribe, and translate

In Microsoft Teams, people can record their meetings and group calls to capture audio, video, and screen-sharing activity. There's also an option to create automatic transcriptions, so team members can play back meeting recordings with closed captions and locate specific discussion items. The recording is saved to [Microsoft Stream](#) for easy and secure sharing across an organization.

Translation capabilities within Teams streamline collaboration across geographies by letting people automatically translate messages in the language specified by their personal settings for Office 365.



Spontaneously launch meetings quickly from chat conversations





## Connect your way

Microsoft Teams is available across mobile, desktop, browsers, and a wide range of devices—from headsets to Surface Hub to meeting room devices. From home, at work, or on the go, people will have a seamless experience across web and mobile apps. When you switch from web to mobile, or from one-on-one to group chat, Teams enables an easy, consistent, natural workflow. When you're using Microsoft 365, device management is simplified. Sensitive data is kept safe while your team is communicating.

## Work remotely, together

Screen sharing is essential for collaboration. Whether you're presenting, having a meeting, or chatting, Microsoft Teams gives you the flexibility to share your workspace at nearly any moment. Plus, you can choose which window to share, so only relevant information is displayed.





02.

# Collaborate intelligently with your favorite Office apps





## Your Office apps in one workspace

### Microsoft Teams brings files, apps, meetings, and calls together

Microsoft Teams uses SharePoint for storage, so your Office 365 files are accessible and editable directly within the Teams workspace. Because meetings and calls are in the same place, your information is contained within one environment. Spend less time searching for files and information and more time collaborating.

### Enjoy built-in access to Office 365 apps

When it comes to collaboration, Office 365 integration enables today's multigenerational workforce to use the Office apps they know and love. Word, Excel, PowerPoint, OneNote, SharePoint, Planner, and Power BI can be accessed directly within Microsoft Teams. So you can create and edit files in Teams, as well as the native app itself.





## Share, edit, and co-author in real time



### Version control made easier

Microsoft Teams brings your Office 365 applications together, so you can easily share, edit, and co-author files. Unlike sharing files over email, where version control can be challenging, Teams stores documents in SharePoint and automatically tracks version history.



### Co-create on the fly

Seamless virtual meetings and screen sharing with Microsoft Teams empowers people to connect at the most crucial moments, removing barriers to collaboration, especially when your team's in a creative flow.

## Synced with Outlook



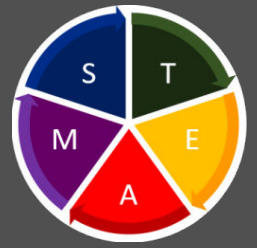
### Easily schedule and join Microsoft Teams meetings from Outlook

Managing email correspondence in Outlook doesn't mean you'll miss your next Microsoft Teams meeting. In fact, you can join and schedule Teams meetings from Outlook.



### View and edit your synced Outlook calendar

You don't have to jump back and forth between apps to manage your schedule because your Outlook calendar is viewable and editable within Teams. When you're using Microsoft Teams, the hub for teamwork in Microsoft 365, collaboration is simplified. Your team can stay focused and on time.



03.

# Work with confidence





## Built-in security

Microsoft has decades of experience building enterprise software and invests more than a billion dollars each year in security. Microsoft Teams comes with the same security and compliance standards and controls that customers expect from Office 365.

**Teams is part of Office 365, meaning you benefit from these additional features and services:**

- Data encryption, at-rest and in-transit.
- Donor and beneficiary data can remain in region or in country.<sup>1</sup>
- Data loss prevention.
- Archiving, legal hold, and eDiscovery.
- Nonprofit customer content isn't accessible in logs or telemetry.
- Multi-factor authentication for enhanced identity protection.
- Secure guest access with Azure Active Directory-managed guest accounts.
- Built-in Mobile Device Management in Office 365.

<sup>1</sup>In-country data residency available for Canada, the United States, the United Kingdom, India, Japan, and Australia.

## Built-in compliance

On the compliance side, Microsoft Teams is at the highest level of certification that Microsoft has for Office 365—it's at parity with SharePoint and Exchange.

**By default, Teams has compliance leadership with:**

- FERPA
- ISO 27001
- ISO 27018
- EU Model Clauses (EUMC)
- GDPR
- HIPAA Business Associate Agreement
- SSAE 18 SOC 1 Report
- SSAE 18 SOC 2 Report
- FedRAMP
- IRS 1075
- FFIEC
- HITRUST CSF Assurance Program Assessment
- CSA STAR Self-Assessment
- Australia IRAP
- FISC (Japan)



## Easy to manage

Microsoft Teams has a unified and familiar administration experience with the controls and granularity that IT departments need. Administrators can manage the end-to-end user experience in Teams and other Office 365 apps from the same place.

Teams comes with enterprise-grade management capabilities, meaning you can configure and set policies down to the user level. And you can control workloads, from meetings and messaging to live events and guests, plus manage the trusted apps your users can access.





04.

# Customize your workspace with the apps and services you know and love







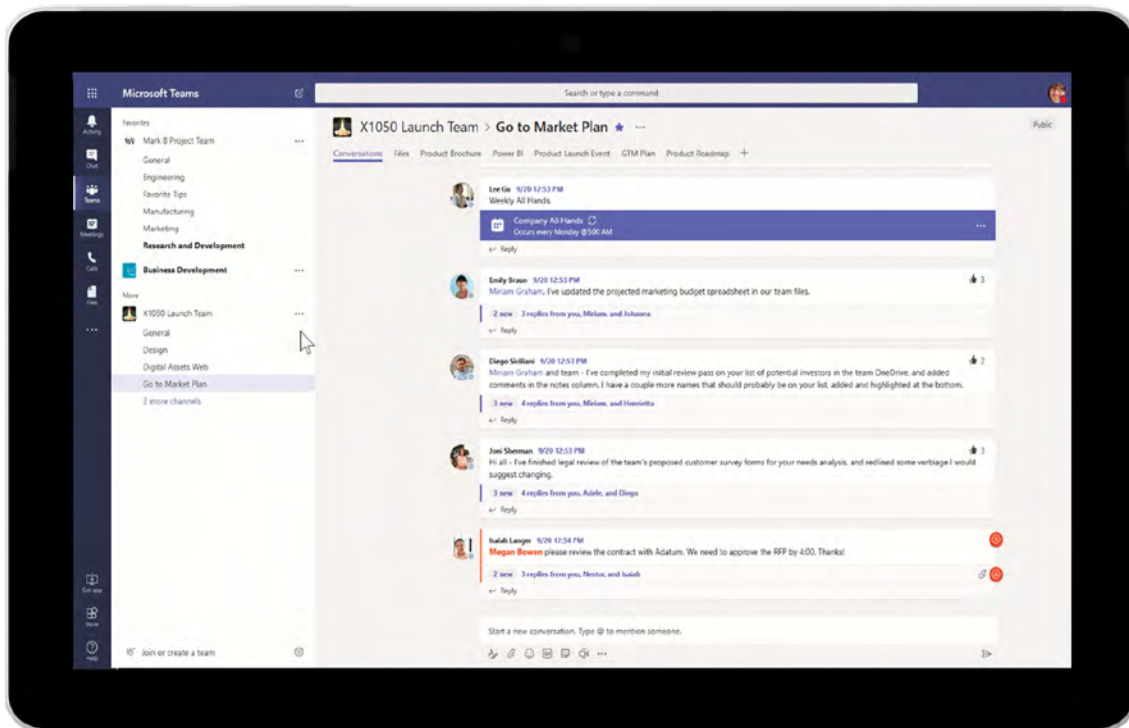
## Make it yours

### Pin important files, apps, and dashboards

Being able to personalize your workspace to your particular needs helps you get the most value from Microsoft Teams. That's why you can easily customize Teams channels to suit your workflow by pinning the most important information where you need it.

### Use built-in and custom tabs

Tabs in Microsoft Teams allow team members to access services through a dedicated space within a channel or chat. This lets them work directly with tools and data and have in-context conversations. Add tabs to a channel, private chat, and group chat to help integrate cloud services and help users easily access and manage the data they need or interact with most.



Customize your workspace by pinning information and adding tabs



## Integrate and manage apps



### Build integrations to existing business apps with the Microsoft Teams developer platform

Microsoft Teams has an open developer platform with third-party services and a rich set of capabilities to build custom apps or integrate with new or existing business processes and services.

- **Bots** help you get tasks done in conversations in Teams. For example, bots can kick off workflows and provide status updates, give and receive kudos from team members, create lightweight surveys to gauge employee and volunteer satisfaction, and answer natural language questions about expenses or fundraising data.

- **Connectors** help you keep current with content and updates of interest from other services you frequently use like GitHub, Trello, Bing News, or Twitter.
- **Actionable messages** allow you to add rich content to connector cards.
- **Compose extensions** allow you to query and share rich cards in conversations.
- **Activity feed** is your single inbox where you're notified of important content from channels, chats, and apps.

Extend customizations even further with the intelligent fabric of Microsoft 365 and SharePoint.

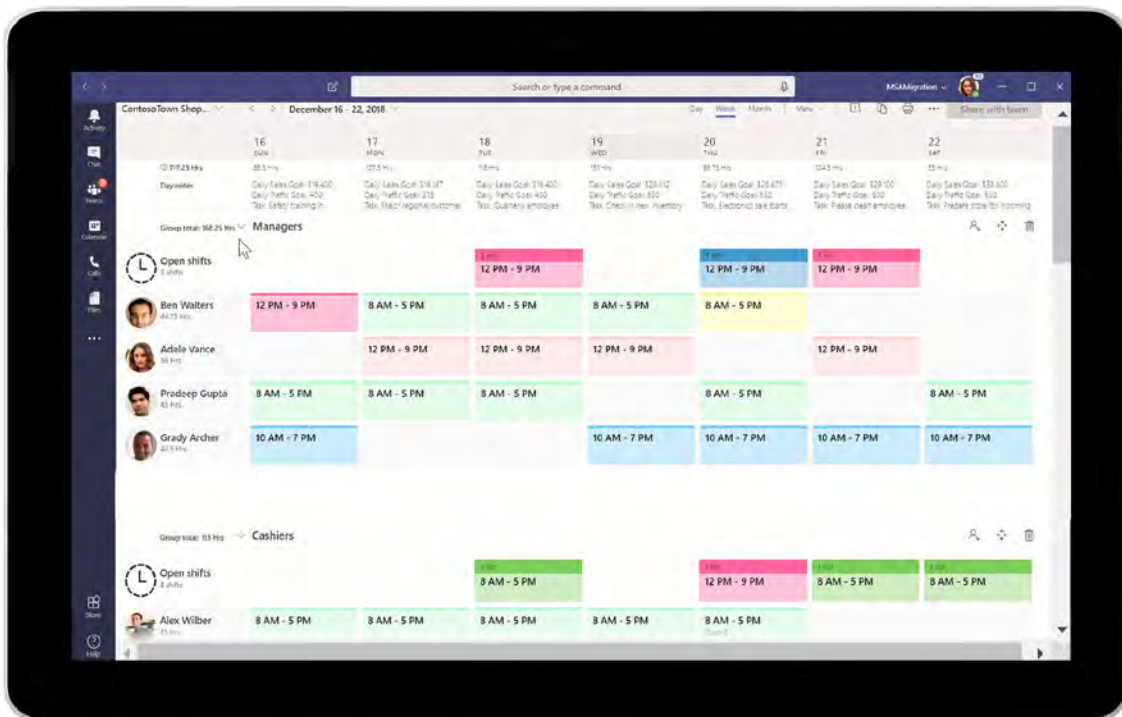


## Manage trusted apps with a sophisticated set of IT controls

Microsoft Teams gives you control over user settings in the Teams admin center. Within the admin center, you can enable and disable default apps and configure settings to control external apps.

## Empower Firstline Workers with tools to succeed

Microsoft Teams enables Firstline Workers—such as program directors, fundraising managers, event planners and volunteers, and caseworkers—to communicate and collaborate effectively with a customizable mobile experience. IT administrators can give employees and volunteers role-based access to the primary Teams features they need. With Shifts, the schedule management tool in Teams, managers can easily plan and create shift schedules, and team members can review schedules and make shift requests from their mobile devices—in real time.



View and manage employee and volunteer schedules using Shifts



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# Modernize teamwork for your nonprofit

Expand on the collaboration and communication benefits of Microsoft Teams in one intelligent solution with Microsoft 365.

Explore how Microsoft Teams can empower your organization.

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