

Advanced Teams Training

For experienced Teams users and administrators

Course Overview

If you already know the basics of Microsoft Teams and want to use it with more intention—this course is for you. Designed for team leads, coordinators, and power users, it goes well beyond chat and basic meetings to focus on structuring collaboration spaces that actually support the way your teams work.

You'll learn how to design team and channel structures for real business workflows: projects, operations, leadership groups, client service teams, HR, and cross-functional initiatives. Learn to implement modern channel types, conversation layouts, and the tighter integration between Teams, SharePoint, and OneDrive.

What You'll Learn in the Advanced Teams Training

- Design teams and channels more strategically for projects, departments, leadership groups, client-facing teams, and recurring business workflows
- Know when to create a new team versus a new channel—and when not to create either
- Choose between standard, private, and shared channels based on access, audience, and collaboration needs
- Use modern channel layouts, including posts and threads, to improve communication flow and organization
- Add and manage tabs, shared resources, and channel-level tools to better support ongoing work
- Choose the right format for any situation: chat, channel conversation, meeting, webinar, or town hall
- Run channel meetings that keep communication and meeting context connected in the team workspace
- Configure meetings more effectively and use breakout rooms for workshops, training, and facilitated sessions
- Present more effectively with PowerPoint Live and other advanced meeting tools
- Use Q&A and event roles for structured sessions and larger-audience communications
- Manage shared files more intentionally, covering file location, sync options, and sharing controls
- Understand the difference between guest access and external access and how each affects collaboration
- Build practical rules for where files should live: chat, channel, or personal OneDrive
- Understand how Teams workspaces connect with SharePoint and OneDrive behind the scenes
- Apply Bookings and Virtual Appointments concepts to service-based scheduling workflows where those tools are enabled
- Recognize security, compliance, and sharing considerations that affect real collaboration decisions

Why Attend This Course

- Helps organizations move from ad hoc Teams use to more organized, sustainable collaboration
- Improves how recurring work is structured, documented, and shared
- Supports better meeting facilitation for training, project work, and collaborative working sessions
- Prepares teams to run professional virtual events and structured online sessions
- Reduces file-sharing confusion and improves access-management practices
- Helps users understand the real impact of guest access, external access, and sharing decisions
- Makes Teams more valuable as a collaboration and workflow platform—not just a chat tool
- Supports more consistent processes for projects, service teams, cross-functional initiatives, and other recurring activities
- Gives power users and team leads a stronger framework for choosing the right tool for the right scenario
- Includes optional paths for organizations that use Bookings, Virtual Appointments, or Teams Phone

Advanced Teams Training Course Topics

Structuring Collaboration Intentionally: When to create a team vs. a channel (and when not to); standard, private, and shared channels; designing channel structures for real workflows; naming conventions; tabs; channel conversation layouts

Designing Better Communication Flows: Choosing between chat, channel, and meeting; using channel conversations for transparent team work; when a shared channel beats a private one; organizing recurring collaboration for findability: **Advanced Meetings and Facilitated Collaboration** Meeting options and participant roles; breakout rooms for workshops and training; presenter modes, PowerPoint Live, and layouts; reactions, chat, and spotlighting; channel meetings

Events Strategy: Meetings, Webinars, and Town Halls: When to use a standard meeting, a webinar, or a town hall; Q&A for moderated audience participation; presenter, moderator, and organizer roles; transition from legacy live events to town halls

Advanced File Sharing and Controlled Collaboration: Where files should live: chat, channel, or OneDrive; personal vs. shared team files; reviewing and changing sharing links; sync and browser access; SharePoint and OneDrive under the hood

External Collaboration, Guest Access, and Sharing Boundaries: Guest access vs. external access; when to add a guest vs. using cross-org communication; how settings affect files, channels, and meetings; practical rules for clients, vendors, and partners

Team Workflows and Business Process Support: Building Teams spaces for recurring processes; project, HR, operations, and leadership workflows; tabs for forms, lists, and dashboards; optional: Bookings and Virtual Appointments scenarios

Teams Phone for Voice-Enabled Organizations: Call handling and forwarding; call groups and simultaneous ring; delegation and shared line workflows; voicemail and history; team-based phone scenarios. Include only if the org uses Teams Phone.

Practical Governance, Security, and Compliance Awareness: What business users should know about data handling; how sharing and file location affect control; sensitivity labels, retention, and eDiscovery at a practical level; do's and don'ts for confidential information

Best Practices and Decision-Making: Choosing the right collaboration model; avoiding over-creation of teams and channels; keeping conversations visible when they should be; storing files correctly from the start