



MICROSOFT TEAMS IMPLEMENTATION CHECKLIST

If Microsoft Teams seems a little overwhelming, you will want to ask for help. It's hard to ask the right questions when you hardly even know where to start. Here's Iconic IT's implementation checklist to help you narrow down your questions and get the answers you need.

#1 - What are you trying to accomplish in Teams?

#2 - What is your experience level in using Microsoft Teams?

- None Beginner Medium Advanced Expert

#3 - What apps does your business need for a basic Teams setup?

- | | | | | |
|----------------------------------|--------------------------------------|------------------------------------|----------------------------------|------------------------------------|
| <input type="radio"/> Outlook | <input type="radio"/> Word | <input type="radio"/> Planner | <input type="radio"/> Forms | Others:

_____ |
| <input type="radio"/> Sharepoint | <input type="radio"/> Excel | <input type="radio"/> Bookings | <input type="radio"/> Power Apps | |
| <input type="radio"/> OneDrive | <input type="radio"/> Powerpoint | <input type="radio"/> Yammer | <input type="radio"/> Stream | |
| <input type="radio"/> Teams | <input type="radio"/> OneNote | <input type="radio"/> Dynamics 365 | <input type="radio"/> To Do | |
| <input type="radio"/> Whiteboard | <input type="radio"/> Power Automate | <input type="radio"/> Delve | <input type="radio"/> Sway | |

#4 - Do you understand how to add Channels and Teams to the platform for scalability?

- Yes No

#5 - Do you understand how to store files and find them?

- Yes No

#6 - Are you familiar with these Teams basic features:

- | | | |
|--|--|--|
| <input type="radio"/> Individual Chats | <input type="radio"/> Making audio and video calls | <input type="radio"/> Screensharing during meetings |
| <input type="radio"/> Group Chats | <input type="radio"/> Individual Calls | <input type="radio"/> Private chates during meetings |
| <input type="radio"/> Teams Meetings | <input type="radio"/> Group Calls | <input type="radio"/> File Syncing (Sharepoint and OneDrive) |
| <input type="radio"/> Teams and Channels | | |
| <input type="radio"/> Integrations | | |

#7 - What programs does your business use that can be integrated into your Teams Platform?

#8 - Do you understand how to access the "help" feature in Teams for real-time assistance?

- Yes No

#9 - Do you know how to keep track of all your activities, tags, and notifications within Teams?

- Yes No

Microsoft Teams is a powerful tool, but it can seem overwhelming at first. Gather your answers from this checklist to go over with an Iconic IT professional so they can help you make the most out of Teams.