

The Trainer's Guide to



Microsoft Teams

Brought to you by



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How to Use This Guide

This guide is designed to provide technical tips & tricks and best practices advice for virtual training conducted via Microsoft Teams. It is suggested that you use this guide to help enhance your understanding of the Microsoft Teams platform, gain confidence in your facilitation skills, and improve upon the learner experience.

While the tips & tricks in this guide are invaluable, they will not provide you with a complete training experience. For access to a bank of hundreds of virtual (and in-person) training activities go to www.soapboxify.com. Soapbox is an all-in-one presentation creation tool that allows you to enter some basic information about your training (length, audience, objectives) and in a matter of minutes will provide you with a complete facilitator guide, slide deck, handouts, and activity instructions. Sign up today for a free 10-day trial to experience how Soapbox will revolutionize your training programs.

Basic Feature Overview

Session Roles

In Microsoft teams, there are three possible “roles” that people may have: organizer, presenter, and attendee. The organizer is the person who schedules the meeting. The organizer can assign the roles of presenter or attendee to participants before or during the meeting. Presenters can do just about anything necessary to run the meeting, while the role of attendee is more limited. *See the Producer Section for more information about roles.*

Capability	Organizer	Presenter	Attendee
Speak and share video	●	●	●
Participate in chat	●	●	●
Share content	●	●	
Privately view a PowerPoint file shared by someone else	●	●	●
Take control of someone else's PowerPoint presentation	●	●	
Mute other people	●	●	
Remove people	●	●	
Admit people from the lobby	●	●	
Change roles of participants	●	●	

Manage recording	●	●	
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Managing Roles

Prior to a Meeting: You will need to send out the meeting invite before you can assign roles. Once you have done that, click *Calendar*, select the meeting you created, and then select *Meeting options*. This will bring up a page where you can make some choices about *Who can present?* Depending on your needs, you may select: everyone, people in my organization, specific people, or only me (the organizer). Keep in mind:

- You will need to send the meeting invite directly to people that you want to select as a presenter.
- You are not able to select someone from a different organization to be presenter.
- The ability to select presenters isn't available for channel meetings.

During a Meeting: There are two ways you may change a role during a meeting:

- Select *Calendar*, click on the meeting, select *Meeting options*. Then use the dropdown menu to select *Who can present?*
- In the meeting controls, click *Show participants*. Hover over the name of the person with the role you want to change and click *More options*. Here you can *Make a presenter* or *Make an attendee*.

If the meeting is recurring, any changes you make in *Meeting options* will apply to all future meetings. However, if you make the change using the *Show participants* control, the change will not apply to future recurring meetings.

Lobby

A Co-Organizer has all the same access and in-session features as the organizer. The only difference is that they cannot access the post-session tools such as reports. If you are utilizing a Producer during your session, you should designate them as a Co-Organizer.



Meeting options

Who can bypass the lobby?
People in my organization

Who can present?
Everyone

Save

Once a meeting is scheduled, you can modify the *Meeting options* for who is allowed to bypass the lobby.

You have the ability to select who can bypass the lobby:

- **People in my organization.** You may choose to allow people in your organization into the meeting directly while having people outside of your organization wait in the lobby to be admitted.
- **People in my organization and trusted organizations.** You may use this when you want certain external guests to wait in the lobby so you can approve them one by one.
- **Everyone.** This will allow everyone with the meeting link to enter the meeting without entering the lobby. This includes people who call into the meeting.

Meeting with External Attendees

Microsoft Teams allows you to have meetings with people outside of your organization, including people who do not have a Microsoft account. External attendees may have the ability to share their desktop or application depending on which browser they are using. See **The Microsoft Teams Features by Device** chart for more details.

Webcam & Voice

🌟 Overview

The most basic features of Microsoft Teams Meetings are the webcam and voice features. Users are prompted to enable their microphones and cameras upon logging into a meeting. Every participant has the option to mute/unmute at any time as well as the ability to turn off/on their camera at any time. In meetings of more than 5 people, Teams will automatically mute any participant who joins after the meeting has started.

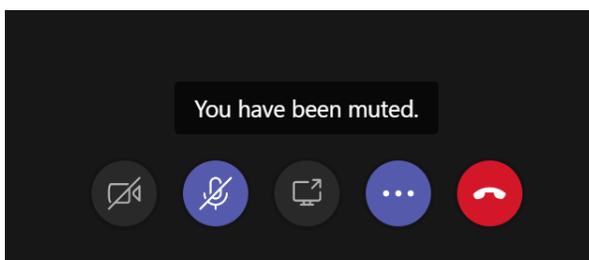
💡 Adult Learning

Adult learners need multi-sensory learning experiences. For virtual instructor led training (VILT) this means asking your participants to enable their cameras during training sessions. Also, adult learners need to be involved in their learning, which includes planning learning experiences with feedback and interaction, both of which are most effective on camera.

⚠️ Limitations

When logging onto Teams, users will be prompted to choose their audio source or enable their webcam. Teams will automatically mute participants in certain situations, so it is important that participants understand how to unmute themselves when necessary.

🔘 How to Turn Your Webcam/Voice On and Off



Participants/Organizer

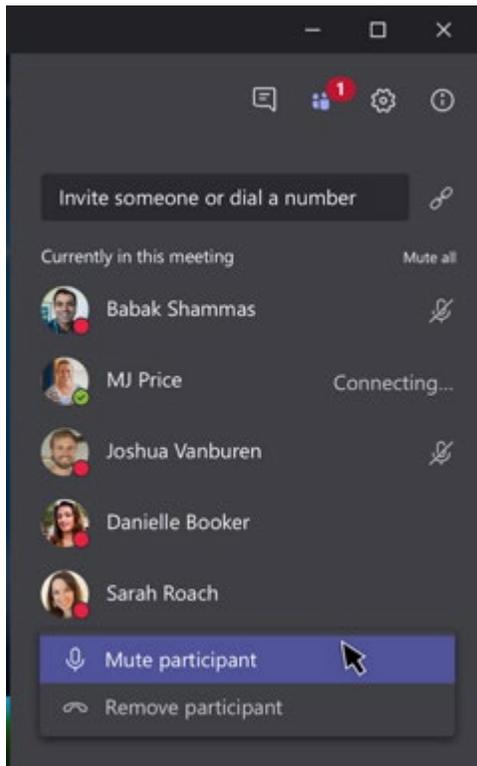
Click the *Camera* button on the toolbar to turn on your webcam.

Click the *Microphone* button on the toolbar to turn on your microphone.

If the *Camera* button is crossed out, it means you are off camera. If the

Microphone button is crossed out, it means you are on mute.

Mute All



Click *Mute all* on your roster to mute all participants. They will receive a notification that they have been muted, and will have the ability to unmute themselves when they need to be heard.

🌟 Best Practices

- 🗣️ **Mute participants upon entry.** Oftentimes when people are joining a meeting there will be a lot of unappealing background noise (car phones, dogs barking, children, colleagues, etc.). Muting participants upon entry ensures that participants don't get blown away by these noises.
- 🗣️ **Ask people to turn on their cameras.** At the start of your session, ask your participants to turn on their cameras. Provide a brief explanation of why you are asking them to do so.

⚡ Back-Up Plan

If the webcam and/or voice aren't working, try signing off of Microsoft Teams and back in again. If that doesn't solve your problem, try a computer restart.

Screen Share

⚙ Overview

Screen sharing is another Teams feature that is easy to use and can be used in a variety of ways to enhance learning. Screen share can be used to present PowerPoint slides, show a webpage or video, or to show a document.

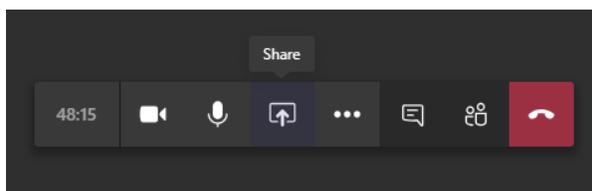
💡 Adult Learning

Adult learners need learning experiences that appeal to all of their senses, including delivery techniques that meet the needs of audio, visual, and independent learning preferences. Using the screen share feature is one important method through which you can engage your learners.

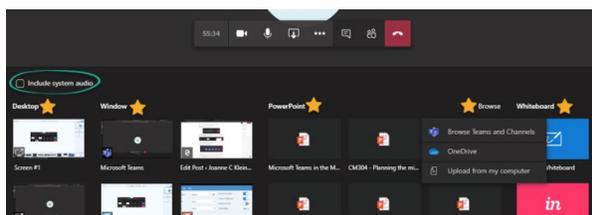
⚠ Limitations

- **Mac users.** If you are using a Mac, you will be prompted to change your privacy settings before you're able to screen share.
- **Linux users.** Window sharing isn't available for Linux users and Linux users also will not see the red border around what is being shared.
- **Presenters.** You cannot give presenter control to someone from outside of your organization.

🖱 How to Screen Share

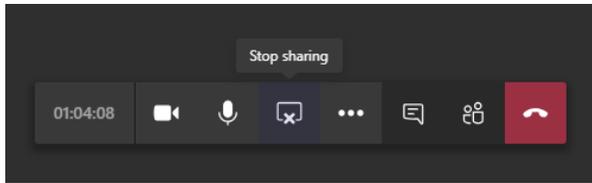


Select *Share*.



Select what you want to share. *Desktop* lets you show everything on your screen. *Window* allows you to show a specific app. *PowerPoint* allows you to show a presentation.

A red border will appear to surround what you are sharing.



Select *Stop sharing* to stop showing your screen.

➤ How to Give Control to Another User

If you want another meeting participant to help you present you can give control to that person. This means that you will both be in control of the sharing, and you (as organizer) can take back control at any time. (NOTE: You will be unable to give control to someone from outside of your organization.)

Organizer

On the sharing toolbar, select *Give control*.

Select the name of the person you want to give control to. They will be notified that you've shared control with them.

To take control back, select *Take back control*.

🌟 Best Practices

- 👤 **Avoid distractions.** If you are sharing a specific application, it is best practice to use the *Window* option to minimize the distractions that appear elsewhere on your screen if you share your entire desktop.
- 👤 **Share your PowerPoint slides from within the Microsoft Teams meeting menu.** When you share your slides this way, meeting participants will have the ability to select *Navigate forward* to move forward in a presentation without disrupting the presenter. Likewise, they can select *To presenter* to sync back with the presenter's view. This allows participants to return to something they missed or to see what is coming in the slides ahead.



Note: If you don't want people to be able to independently navigate through your PowerPoint file, click the *Eye* image to prevent it.

- 👤 **Request control.** Meeting participants have the ability to request control in the event that they would like to share something. The meeting organizer will have the ability to approve or deny the request.
- 👤 **Teach participants how to Zoom.** Participants have the ability to zoom in on shared content if necessary by:
 1. Pinching in or out on a trackpad. (NOTE: this method doesn't work for Mac users)
 2. Using the keyboard shortcuts Control + Plus Sign + Minus Sign.
 3. Holding the Control key while scrolling with the mouse

⚡ Back-Up Plan

It is a good idea to share all of your materials with your producer prior to the start of the session so that they can take over screen sharing a PowerPoint or document in the event that you have technical issues in trying to screen share. It is also a good idea to have back-up activities in mind in the event that your planned screen share doesn't work. For example, if you are planning to show a video but you can't get the video to play, you could instead tell a story that drives home the same point.

Chat

⚙ Overview

Chat is another basic Teams Meeting feature that all participants have access to regardless of their device. Participants have the ability to chat with the entire meeting group or to privately chat with individual people within the meeting group. You can also share documents, emojis, GIFs via the chat feature.

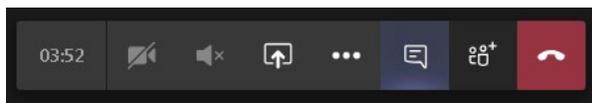
💡 Adult Learning

Chat is a great tool by which to allow adult learners to actively and practically participate in their learning experience in order to learn by doing. Facilitators can ask questions for participants to share how they can apply their learning to their lives. Further, the chat feature allows participants to practice and be involved in the learning experience through feedback and evaluation.

⚠ Limitations

A company's Organizational IT Administration may limit or block certain features of the chat experience.

🖱 How to Chat



In the toolbar, click *Show conversation*.

⚙ Best Practices

👤 **Chat history.** Be aware that previous chat history will show if it is a recurring meeting.

👤 **Types of Messages:**

- **Standard.** A normal message.
- **Important.** Will mark the message in bold red letters.

- **Urgent.** This will send a notification every 2 minutes for 20 minutes until participants respond.

⚡ Back-Up Plan

If chat isn't working for some reason or you are feeling overwhelmed by the amount of talk in the chat window, you can always unmute some or all participants and ask people to verbal respond to questions or to elaborate on something that they shared in the chat window.

Feedback Indicators

⚙ Overview

Microsoft Teams allows participants to raise a virtual hand to let people know that they would like to contribute without interrupting the conversation. Virtual hand raising can also be used to poll participants during yes or no questions (ex: Raise your hand if you think this is correct. Do not raise your hand if you do not think it is correct).

💡 Adult Learning

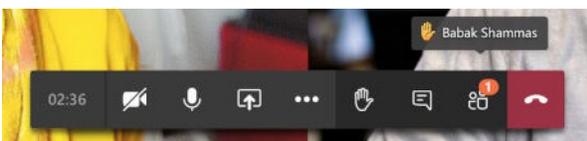
Effective adult learning programs allow for participant feedback and consultation. Feedback indicators are a simple way for participants to be involved in their learning process.

🖱 How to Use

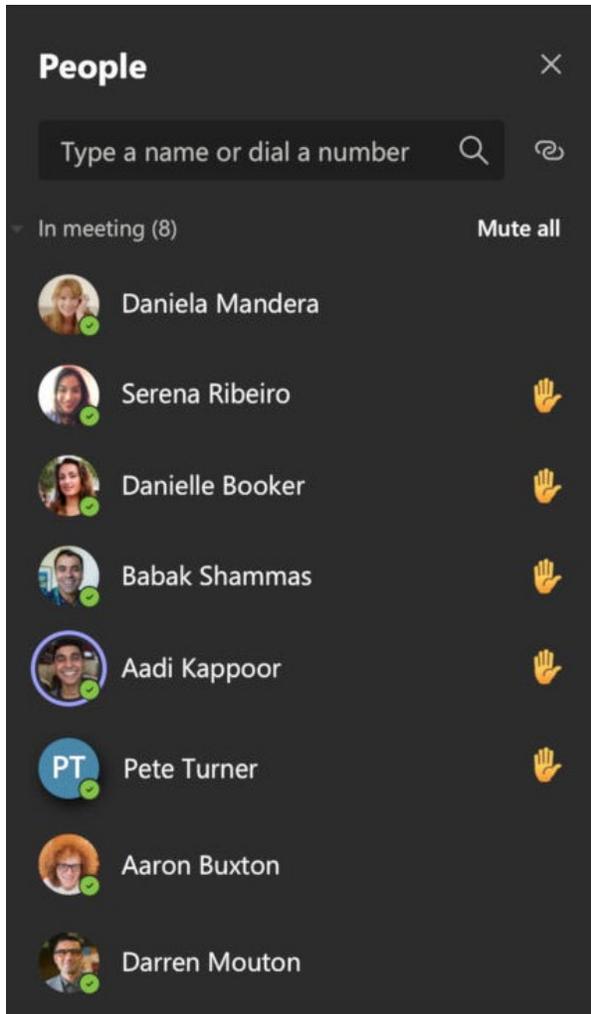


Participants

Click the *Hand* icon in the toolbar to raise their virtual hand.



Everyone in the meeting will be able to see who has raised a hand. Meeting presenters will receive a notification that someone has raised their hand and will also have the ability to lower a hand once that person has had the ability to talk.



Organizer

Select *Show participants* to see a list of all attendees. Anyone who has raised their hand will have the icon next to their name. Names are listed in the order in which participants raised their hands.

🌟 Best Practices

- 👤 **Feedback indicators can work like a poll.** If you would like to ask a yes or no question to participants, feedback indicators are a great way to go. They are also helpful to gauge understanding at any point during your session by asking participants to raise their hand if they don't understand the directions you have given.
- 👤 **Tell participants about indicators at the start of your session.** If you point out the feedback indicators at the start of your session, it can be a great tool for people who have questions to signal you without interrupting or jamming up the chat section.

⚡ Back-Up Plan

If virtual hand raising isn't working for some reason an easy back-up plan is to have participants chat share their answers. If your group size is small, you may also allow participants to share answers to a simple question verbally.

Producer Role

Overview

The producer is the unseen facilitator. Their job is to take care of the administrative and technical aspects of the session to free up the facilitator to focus on content delivery. It is important to select your producer carefully. A successful producer is one who knows the platform well, who has the technical expertise to be able to help participants who are having problems, and someone who can jump into the role of facilitator in the event of a technical problem. In Microsoft Teams, it is important to give the role of *Presenter* to your Producer so that they have access to the tools necessary to do their job.

Job Responsibilities

- ✓ **Admit people.** If you have a lobby in use for your meeting, the producer should be the person working to admit people to the meeting.
- ✓ **Answer chat questions.** It is important to keep an eye on the chat box during the session and to respond to questions or help requests as necessary.
- ✓ **Record your session.** If you would like to have your session recorded, it should be the responsibility of the producer to make sure they enable the recording feature at the start of the session.

Limitations

- **You need a compatible device.** Be aware that there are a number of device limitations that will impact someone's ability to act as Producer/Presenter. *See the Microsoft Teams Features by Device* chart for more information.
- **Assign the Producer to be Presenter prior to the start of your meeting.** You will want to assign your producer to be a presenter when you schedule your meeting so that they have access to everything they need. In addition, it is important to note that there are some limitations on who you are able to assign the presenter role to. *See the Managing Roles section above for more information.*

Best Practices

-  **Practice.** The most important thing for a successful session is for the facilitator and producer to practice together. Ensure that all features are enabled and set up, and run through the entire presentation together to ensure that each person knows their responsibilities during the session.
-  **Be on hand as a back-up facilitator.** In the event that your facilitator has an unstable internet connection or has a computer crash, it is important to have the slides and lesson plan pulled up on your own computer and ready in the event that the producer needs to jump in as the facilitator. Make sure that you understand the learning objectives and activities in order to continue the session if your facilitator experiences technical difficulties.
-  **Be on camera.** Best practice is that both the facilitator and producer will be visible on camera.

- 🗣️ **Introduce the producer and explain their role at the start of the session.** It is important that participants are introduced to the producer at the start of the session and told that they should reach out to the producer if they need help at any point during the session.
- 🗣️ **Tell participants how to contact the producer if they need help.** The best way for participants to reach out to the producer with technical problems is through a private chat message.
- 🗣️ **Check-in with your producer periodically during your session.** It is easy to get into the flow of presenting and forget to check-in to make sure that everything is going alright. Make a point to check in with your producer periodically throughout your session. You may choose to do this verbally or through a private chat message.

Structure

Pre-Session Activities

People will always arrive at the session early. It is a good idea to have something for participants to do when they arrive at your session. This gives participants the opportunity to get comfortable with the tool and can also be a means by which to share content. Possible activities may be playing a trivia slide deck or doing a pre-session activity such as answering questions, or playing a game.

Starting Your Session

- ✓ **Begin with “housekeeping” items** to set expectations and help Participants get comfortable with the tools being used. You can use icebreaker or anchor activities as a means by which to teach Participants how to use a tool in order to accomplish this seamlessly.
- ✓ **Include breaks as necessary.** If your session is to exceed one hour, you may need to consider adding a break. Add breaks to VILT sessions as often as you would to an in-person training session. You may consider planning for “working breaks” prior to a breakout session or activity using the annotation tools. Ask Participants to prepare for the activity prior to taking their break. This will provide for an opportunity for people who need more assistance to get it while not holding up the session.

Attendance

Meeting organizers can download an attendee list. However, the list must be downloaded during the meeting (it will not be available after your meeting). To download during the meeting, select *Show participants* and then select *Download attendee list*. This report will contain participants names, join time, and leave time. (NOTE: This feature must be turned on by your administrator to utilize.)

Post-Webinar

It is best practice to send out an evaluation after your session. This is also a good opportunity to send out handouts or resources that were shared during your session.

Practice

Pre-Session Checklist

Prior to starting your practice session:	
<input type="checkbox"/>	Send your meeting invite <ul style="list-style-type: none"> ● Pay careful attention to the settings that you pick for your meeting such as enabling the lobby and assigning roles.
<input type="checkbox"/>	Check your meeting settings <ul style="list-style-type: none"> ● Do you want people to be able to bypass the lobby? ● Do you want to be notified when callers join or leave the meeting? ● Do you want to pre-assign roles prior to the start of the meeting?
During your practice session:	
<input type="checkbox"/>	Test your microphone and camera <ul style="list-style-type: none"> ● Presenter: Can your Producer see and hear you? ● Producer: Can your Presenter see and hear you?
<input type="checkbox"/>	Launch your slides <ul style="list-style-type: none"> ● Can your Producer see them? ● Can you view your slide notes?
<input type="checkbox"/>	Decide how you are sharing your handouts <ul style="list-style-type: none"> ● Are you sending them prior to the session or after the session? <ul style="list-style-type: none"> ○ If you want participants to get handouts during the session, you can share via the chat section
<input type="checkbox"/>	Run through your entire session <ul style="list-style-type: none"> ● Is the timing correct? Do you need to cut or add anything?
<input type="checkbox"/>	Discuss with your Producer what their responsibilities are for each activity <ul style="list-style-type: none"> ● How will you communicate with one another during the session? ● What are the back-up plans if something goes wrong? ● Where do you anticipate people struggling with the technology? How can you be prepared to alleviate some of this stress?
<input type="checkbox"/>	Have the producer practice clearing feedback indicators, admitting people from the lobby, sharing controls, and muting participants. <ul style="list-style-type: none"> ● Are you able to mute all participants? Mute a single participant? ● Are you able to clear a virtual hand raise? ● Are you able to admit people from the lobby? ● Are you able to share controls with a participant?
<input type="checkbox"/>	Share the lesson plan and slides with your Producer so that they can take over

	in the event of a technical disaster
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Handouts

Handouts are a useful addition to any session. Prior to a VILT session you need to consider how you will be sharing handouts.

Sharing before the session via email

There are a few possible downsides to this method:

- Participants might not attend your session if they receive the handouts in advance.
- Participants could not receive the email or not get it prior to the session, causing a struggle during the session to get everyone on the same page.

Sharing via chat during the session

There are a few possible downsides to this method:

- Participants don't have access after the session to the chat. If they forget to open it during the session, they could miss the opportunity to receive the handout.
- Handout links can get lost in a busy chat or not seen by some participants.
- Technical difficulties can cause people to not be able to open handout links.

Sharing after the session via email

You may decide to share your handouts for the first time after the session OR to combine sending handouts after the session with one of the options listed above. It is a good idea to combine a session evaluation in your post-session handouts email.

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