

# Matt Wade's Definitive Guide To: **Rockstar Meetings in Microsoft Teams**

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*By Matt Wade with Sven Seidenberg*

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## Matt Wade's Definitive Guide To: Rockstar Meetings in Microsoft Teams

Microsoft Teams is a chat- and video conferencing-based workspace app that comes as part of a Microsoft 365 subscription. It's meant to facilitate ongoing collaboration and communication occurring among any team, project, organization, or group of people. Teams provides single-point access to conversations, files, notes, tasks, and, most relevant to this guide, online meetings.

Online meetings have become incredibly important in the world of employees and students who can work and learn remotely starting as early as the late 1990s, but especially so with the impact of the Covid-19 pandemic.

This guide covers the how-to, tips and tricks, and everyday etiquette for using Microsoft Teams for good online meetings. These guidelines are meant to be a starting point and won't be perfectly applicable to every organization, but they should get you going with setting ground rules for you and your peers. For the sake of this publication, the terms meeting, call, conference, and similar all mean the same thing.

### Want to know more about Teams Management & Governance?

**AvePoint has you covered!** It's important to properly govern the provisioning and lifecycle of your Teams. Learn the right way to manage Teams with our, **When to Use and How To Manage Teams and Office 365 Groups** ebook. ([www.avepoint.com/groups-ebook](http://www.avepoint.com/groups-ebook)). Or learn more about our **Cloud Governance** solution.



- **Meetings and calls are better on the desktop app.**

The web version of Teams is great, but not as feature-rich as the desktop app. Especially for meetings.

- **You don't need the app or a browser plug-in to join a meeting.**

On desktop, anybody can join a Teams meeting right in a browser; no downloads necessary. Use Edge, Chrome, or Firefox.<sup>1</sup> The free Teams mobile app lets you join without an account, too.

- **Make sure your audio and video are set up and working.**

You can type `/testcall` in the Teams search bar to make a designated test call. Teams runs you through a quick diagnostic test to ensure your audio and video are working well.



- **A pair of headphones goes a long way.**

Wired or Bluetooth headphones will make the sound experience better for everyone. Make sure to choose the correct speaker and microphone when joining your meeting.

- **Make use of the whole Microsoft 365 suite.**

Teams incorporates multiple Microsoft 365 apps: use OneNote to take notes or minutes, share and edit documents in SharePoint, create follow-up actions right in Planner. Learn more at [jump.to/Groups](https://jump.to/Groups).



<sup>1</sup> docs.microsoft.com

 jump to 365



# It's Not About the Tool

## CHAPTER 2

Good meetings happen because the people who lead them are competent, prepared, and organized. Microsoft Teams will not make a meeting good or bad; the people in the meeting will be responsible for that outcome. Make sure to follow the meetings best practices below to make the most of bringing everyone together. Professional organizations like APQC<sup>2</sup> and PMI<sup>3</sup> have additional resources, too.

- **Have a set agenda and share it ahead of the meeting.**

Identify the topic, topic owner, and request input ahead of time. Ensure the agenda file is easily accessible to all meeting attendees; include a link in the meeting description or in the channel conversation of a channel meeting.

- **Define success for the meeting.**

Make it abundantly clear what it means to have achieved the expected outcome(s) of the meeting. Make sure the attendees share the same view of what constitutes success.

- **Invite the right people.**

A meeting without key stakeholders quickly becomes pointless. And meetings with too many non-essential attendees can waste people's time. Be strategic and respectful.

- **Share background information and resources ahead of the meeting.**

Ensure everyone has access to all reading materials, presentations, and numbers before the meeting. Post them in your Team, perhaps as tabs, or link to a folder of meeting resources in the meeting description.

<sup>2</sup> [www.apqc.org](http://www.apqc.org)

<sup>3</sup> [www.pmi.org](http://www.pmi.org)

- **Stay on topic.**

Have a parking lot for off-topic but productive conversations. Great use of a separate page in your OneNote notebook or the Whiteboard that comes with your meeting.

- **Have a timekeeper.**

Each agenda item should have a time limit to keep discussion on point and productive. Assign an attendee to drop the hammer on time limits.

- **Have a scribe.**

Taking good notes while facilitating a meeting is incredibly difficult. Assign an attendee to take notes that can be shared with everyone afterwards. Formal minutes or not, any written record is helpful.

- **Track action items and assign them appropriately.**

Write down any tasks that arise during the meeting, make sure each has an owner, and assign a due date. Without writing these down, it's easy for people to forget or misinterpret the concluding expectations of the meeting.



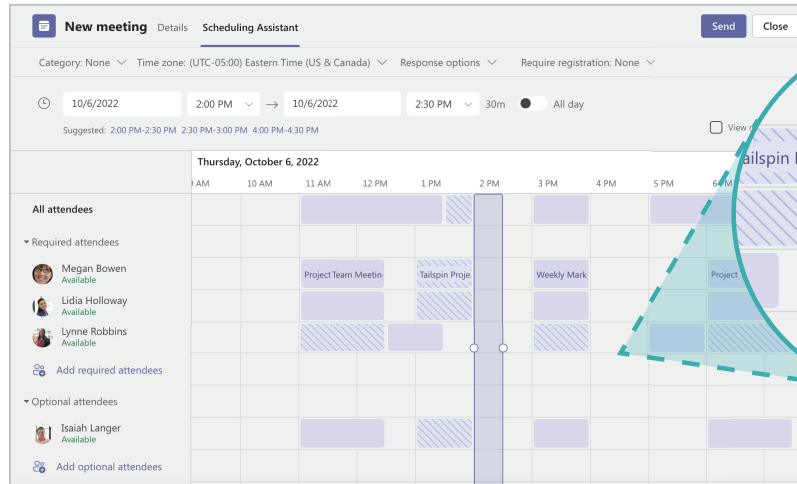
# Finding the Right Meeting Time

## CHAPTER 3

Scheduling around everyone's existing appointments can be difficult, especially if you're crossing time zones or including external attendees. There are a few good options for this; you just need to be familiar with how they work.

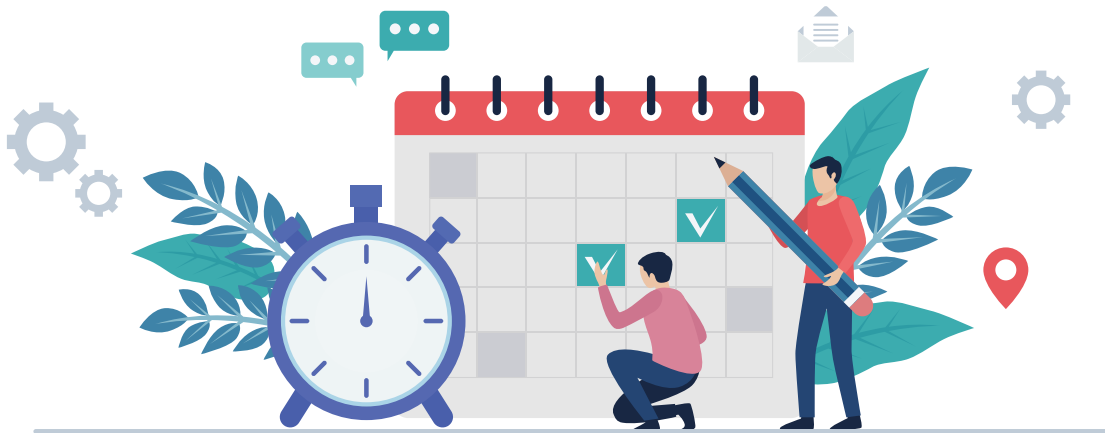
- **Use Scheduling Assistant for internal meetings.**

You should be able to see your colleagues' availability through Scheduling Assistant so you can avoid times when they're booked. It's no different than the feature in Outlook.



- **Use FindTime to poll attendees for schedule preferences.**

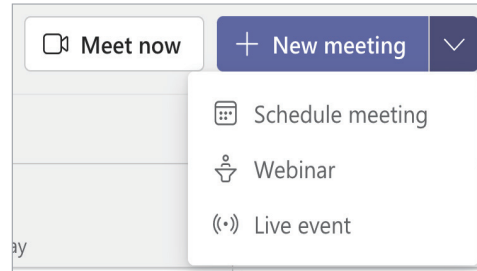
FindTime is a free Outlook plugin similar to doodle.com that lets attendees vote on available and favorite time slots and can even automatically schedule a Teams meeting once consensus is found. Visit [jump.to/FindTime](https://jump.to/FindTime) for more information.



# What Type of Meeting Should I Use?

## CHAPTER 4

You've got a few options for your meetings. An online meeting is great for a project team, organizational unit, or ad hoc call. A channel meeting (a specific type of online meeting) is great for meeting within a Team itself. Live events are perfect for town hall meetings and corporate presentations where the event is a one-way broadcast. And webinars are useful for presenting content, products, or general information to an audience you want to have sign up prior and maybe be able to interact with the presenters. There are certain aspects of your meeting that should help you understand when to use which. Open your calendar in Teams and click the dropdown arrow to the right of **+ New meeting** to choose between the three.



## When to schedule an online meeting

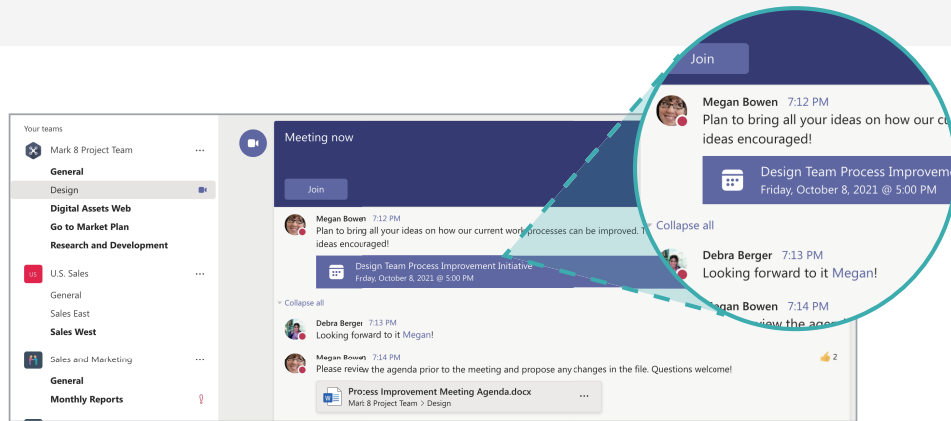
A scheduled meeting, webinar, or meet now meeting will likely meet most of your online meeting needs. You can include up to 1,000 active attendees (up to 19,000 more can view the meeting) and they can join through Teams or a phone number. The meeting comes with a designated chat space, a hyperlink to open the meeting in Teams on desktop, mobile, or a browser, and can include attendees both internal and external to your organization. If you've used Skype for Business meetings, the experience is similar, but with more features.




## When to schedule a channel meeting

Channel meetings take advantage of the new technology platform that Teams affords and therefore might be something you should consider using for internal meetings within your Teams. Channel meetings let you have all your meetings, their chat, reports, and recordings stored directly in the project or department Team they are happening for.

A channel meeting occurs in a channel. Obvious enough, most likely. What might not be so obvious is that the chat and files associated with that meeting are also kept in the channel. The meeting itself is its own channel conversation and files uploaded to the meeting chat are saved in the Files tab of that channel.



The conversation remains connected to the meeting, even if the meeting is on a recurring schedule. When the meeting takes place, you'll see a video icon next to the channel name. Click the channel name and you'll see a space displaying the ongoing meeting with photos of attendees who have joined and any conversation that's taken place.



Creating the channel meeting takes place when you're scheduling your meeting; you can select a channel to hold that meeting in. The Team members are not automatically sent an email invitation for the meeting. You can only use a channel meeting when all invitees are already members of the Team it's taking place in. As of the time of publishing, channel meetings cannot be scheduled in private channels.

## When to schedule a live event

Live events are large-audience meetings with a small number of presenters; they can range from single-camera presentations to professionally organized events with multiple feeds. Live events broadcast their video feed to up to 25,000 viewers and work well for town halls, conferences, and other large events that don't require much interactivity between the presenters and the viewers. Video feeds are delayed 15 to 60 seconds and interaction is limited to moderated Q&A. Before scheduling your first live event, you should [read up on how they work](#) in detail.

## When to schedule a webinar

Webinars are essentially standard meetings that include a sign-up process so organizers know who to expect in attendance. You get an individual registration landing page connected to your webinar, which you can brand and share widely for anyone to register (either internal or external). Otherwise, a Teams webinar has the same features as a standard meeting, including chat, participant roles, and other settings.

Like this guide? Then you'll want to take it to the next level with our book **Teach Yourself Visually: Microsoft Teams**. It's by far the most detailed resource for making the most out of your meetings in Microsoft Teams, with hundreds of step-by-step screenshots and specific tasks every meeting participant can learn from. Get it today for you and your entire organization!



- **Assign roles to your invitees.**

Teams meetings and webinars offer three different roles: organizer, presenter, and attendee. Each role [has different capabilities](#). While it's not required to set roles, they can be helpful in keeping control.

- **Post your agenda in the channel conversation or include a link to it in the appointment.**

This gives everyone the ability to familiarize themselves with the topics. And since the file's not an email attachment, you can make updates to it as you please and the link always opens the current version.

- **If you want a phone number connected to your meetings, you need a license.**

Teams can append a phone number and meeting ID to the invite. If you don't have this, you need to talk to your IT administrator about purchasing a license. Anyone with the Teams mobile app can still join a meeting without the phone number, though.

- **Try scheduling your meetings for 25 or 50 minutes.**

Admittedly this is hard to stick to, but if you do, everyone might like you a lot more. It provides opportunities for quick breaks, like grabbing a glass of water or visiting the bathroom. You can set this up in Outlook for your meeting defaults<sup>4</sup>.



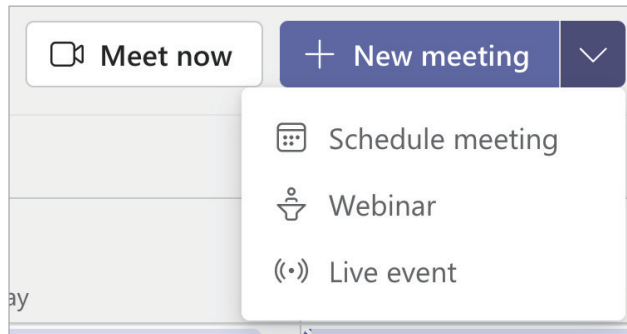
<sup>4</sup> [support.office.com](https://support.office.com)



## Schedule a meeting in Teams

It's very easy to schedule a meeting in Teams. Each meeting you create automatically has a dedicated online meeting space. No extra steps required.

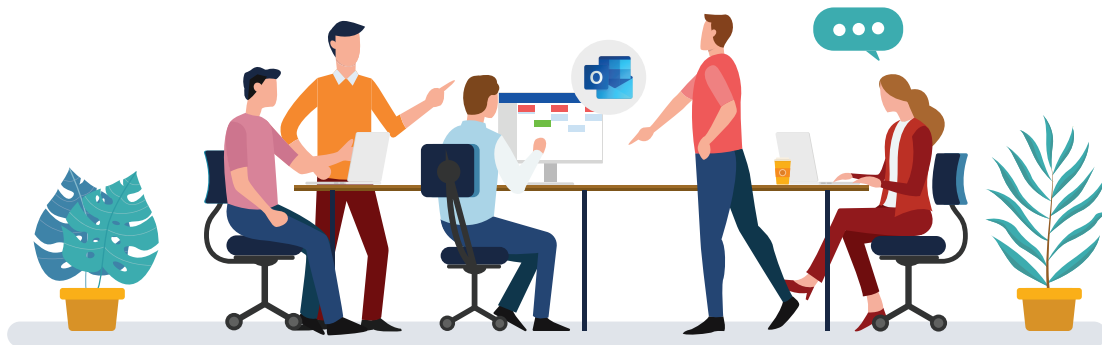
- 1 Click the Calendar icon in the Teams app bar then click +New Meeting > Schedule meeting.
- 2 Complete the details of your meeting.
- 3 You can invite anyone with an email address, whether they're internal colleagues or external to your organization. External attendees can join your meeting from Teams or from a browser.
- 4 Press send and get ready for your meeting.



Another quick way of scheduling a meeting is the shortcut from your ongoing private chats. Below the message box you will find a small calendar icon. Click this icon to open a pre-filled meeting invite with all the individuals in the chat set as invitees.

## Schedule a meeting in Outlook

Although it's recommended to use Teams to schedule your meetings, you can also schedule Teams meetings through Outlook. Open your Outlook calendar and click the option to create an event and there is an option to [add an online meeting](#) in Teams.





Channel meetings take place in a channel in a Team. You schedule your channel meeting the same way as any other meeting in Teams. Just make sure to choose a channel from the Meet in a channel field in the new meeting pane.

- Channel meetings do not invite the Team members or channel followers (unless they subscribe to the underlying Group notifications<sup>5</sup>). You still must invite people explicitly.

- Once you invite someone that's not a member of the Team, the meeting can no longer be a channel meeting.

- Just know that those external attendees will not have access to meeting chat, files, and some other features because they're not a member of the Team. Handy, but don't rely on it.

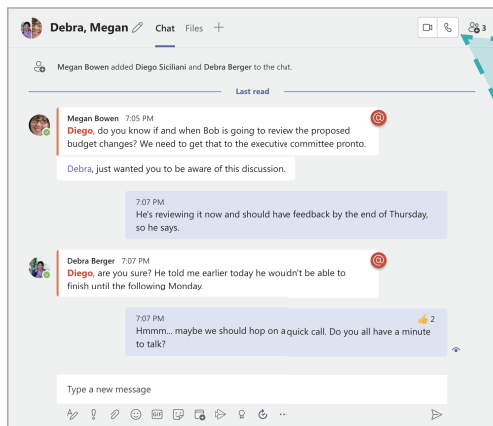
- This is one of the feature limitations that comes with using private channels.



Sometimes you just need to hop into a quick video call with some people right now. There are a bunch of ways to start ad hoc meetings—including starting a video call directly from an ongoing private chat, for example—but this is the one sure way that doesn't require any prior setup and is a good default to remember.

- 1 Click the Calendar icon in the Teams app bar then click *Meet now*.
- 2 Name your meeting and choose your audio and video sources. Join the call.
- 3 To include internal people, open the Participants pane and enter their names in the box to call them. When they answer the call, they join the meeting.
- 4 To include external people, open the Participants pane, click Share meeting, and send the copied link to your recipients (via email, chat, text message, whatever works).

Another quick way of starting an ad hoc meeting is available within your ongoing private chats. There are buttons in the private chat to start an audio call, video call, or screen share with the people in your chat. This is useful for kicking off a meeting quickly with people you interact with regularly.





# Join a Scheduled Meeting

## CHAPTER 6

Joining Teams meetings is easy. Each meeting includes a standard signature section in the appointment with a link to join and a phone number and conference ID for those who have a license for the phone number. But the best experience is joining from your Teams or Outlook calendar.

### Join from Teams

Click the Calendar icon in the Teams app bar, then click the meeting you want to join. In the meeting details is a purple Join button. Click that to join, select your video and audio settings, and join in.

If the meeting is imminent, there will be a Join button right on the calendar appointment itself to save you some clicks. If the meeting has started, you'll likely get a notification about it.

### Join from Outlook

Click the Calendar icon in the Outlook app bar, then click the meeting you want to join. In the meeting details is a Join button. If the meeting is imminent, there will be a Join button right on the calendar appointment itself to save you some clicks. On desktop, the meeting will launch in the desktop app. On mobile, the meeting will always open in the Teams app, so make sure it's downloaded (especially for external attendees who may not otherwise use Teams—the app is free and no account is required to join a meeting). Select your video and audio settings and join in.

### Join from any email address

In the appointment, find the Join Meeting section in the signature and click Click here to join the meeting. Select your video and audio settings and join in. If you don't have Teams, you can join through your browser; no downloads or plug-ins required.

### Join from a telephone

In the appointment, find the Join Meeting section in the signature to find the phone number and

#### Microsoft Teams meeting

Join on your computer or mobile app

[Click here to join the meeting](#)

Or call in (audio only)

+1 323-555-1234, 123456789# United States, Los Angeles

Phone Conference ID: 123 456 789#

[Find a local number](#) | [Reset PIN](#)

[Learn More](#) | [Meeting options](#)



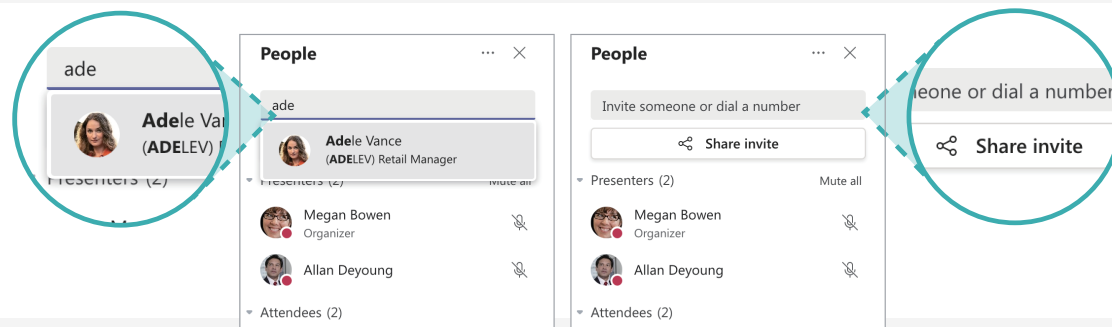
conference ID to join by audio only. The meeting organizer requires an additional license to use a phone number for audio conferencing.<sup>6</sup>

## Join using Apple CarPlay

You can join a Teams meeting while driving without touching your phone using the Apple CarPlay integration. Your car needs to offer Apple CarPlay to do this. When connected to Apple CarPlay tap the Teams icon on your infotainment screen. This will prompt Siri. Ask Siri to “Call next meeting using Teams,” and Siri will join the next meeting in your calendar. You can join a meeting this way 15 minutes before the meeting starts and up to 5 minutes after the meeting started.

## Pull someone into an ongoing meeting

Sometimes you need to quickly get someone into an ongoing meeting and they don’t have the appointment readily available. You can add people as necessary during the meeting itself.



- 1 While in the meeting, click the attendee listing to reveal the **Show participants** pane.
- 2 If you’re inviting someone from your organization, start typing their name in the **Invite someone** field and select them when they pop up.
- 3 If you’re inviting someone from outside your organization, click the link icon and send the copied link to your recipients (via email, chat, text message, whatever works).

# During Your Meeting

## Tips for everyone

Regardless of whether you're leading the meeting, taking part, or just following along, everyone should do their best to follow these recommendations to ensure everyone has a good experience.

- **Don't multitask.**

Just because you can more easily get away with jumping between apps while in an online meeting than in a physical meeting, that doesn't mean you should. Be respectful of everyone else: be present, be engaged, and be on task.

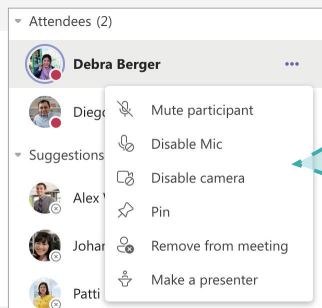
- **Use video when circumstances and internet connection support it.**

Video facilitates a much more effective meeting than audio.

- **Mute new joiners if they get noisy.**

As people join, they may not be muted and might cause distractions. You'll see who's making noise from the purple hue around the icon in the attendee list.

*Note: only certain meeting roles can perform this action.*



- **Stay on mute when you're not talking.**

Nobody wants to hear you cough or listen to your dog whimper about needing to go out.

- **Use background blur or a custom background image to minimize distractions.**

Everyone will see your background a lot. Consider an image with reminders on how to be a good attendee, like [this example](#) or ask your IT team to provide some backgrounds for everyone.

- **Use chat to help share resources and information during meetings without causing a distraction.**

It's helpful to share web addresses, contact names, spellings, and other supplemental information while someone else is talking. These chats are part of the channel/private chat, so everyone can refer to them after the meeting, all without disrupting the call.

- **Share your screen.**

Screen sharing keeps everyone on the same page (sometimes literally!) during your meeting.

- **When sharing PowerPoint presentations, keep them simple.**

If you directly share a pptx, it loads through PowerPoint Live, which lacks support for robust animations and transitions.

- **When sharing webpages, zoom in.**

This helps your attendees see what you're showing, which is usually smaller on their end. Ctrl/⌘ + = will zoom in most browsers.

- **Record your meetings for future reference.**

The videos can be useful for training and for people who were absent. Teams can even auto-transcribe what was said. Meeting recordings will automatically appear in the meeting chat and in the Meeting Recap after the meeting ends.





## Tips for the meeting leader

Leading the meeting comes with responsibility. Here are some things to keep in mind to run your meeting like a pro.

- **Admit attendees as they join the lobby.**

The lobby is a safe space for attendees to wait to join the meeting. Just don't forget about them. You can [change these settings](#) if you prefer.

- **Mute everyone at the start of the meeting.**

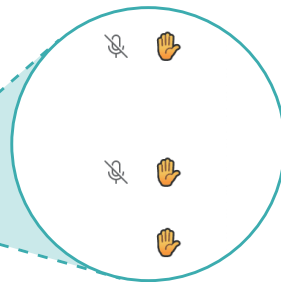
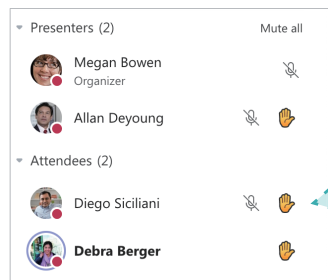
Use the *Mute all* feature at the beginning of the session. This ensures distracting sounds don't come through.

- **Join the call with your mobile device to track chat.**

Sometimes the content on your screen overtakes your ability to follow the meeting chat. But you can join with the smart phone app and follow chat from there.

- **Keep an eye on raised hands.**

Attendees can click *Raise hand* to indicate they want to say something. Be on the lookout for the notification so they don't sit and stew for too long.



- **Share meeting recordings with attendees.**

If the meeting includes people outside your Team (including externals), it can help to upload the video to your OneDrive and share a link to everyone in a follow-up message.

- **Instead of manually taking attendance, use the attendance reports.**

You can access this report from the Participants pane during the meeting and the Meeting Recap after the meeting.

- **Enable live captions for accessibility.**

If you have the right Microsoft 365 license, you can enable live captions, which helps participants with hearing issues or anyone with distracting background noise.

## Tips for meeting attendees

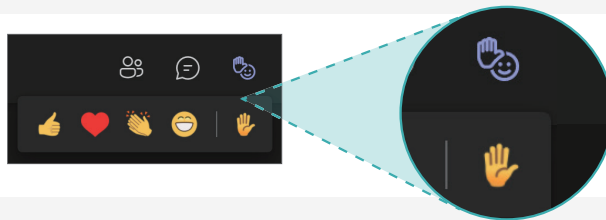
Attendees have a role in facilitating a good meeting, too. When you join a meeting, follow these tips to help keep things running smoothly.

- **Use the Teams app if you can.**

The web version of Teams is great, but not as feature-rich as the desktop app. Especially for meetings. But if you don't have a Microsoft 365 account, don't worry: the browser is plenty good enough.

- **Raise your hand to speak. Add a reaction to share your feelings.**

Use the Teams Raise hand feature to indicate to the meeting lead that you have a question or something to add. This will help avoid interruptions and awkwardly cutting each other off. The menu includes reactions, too!



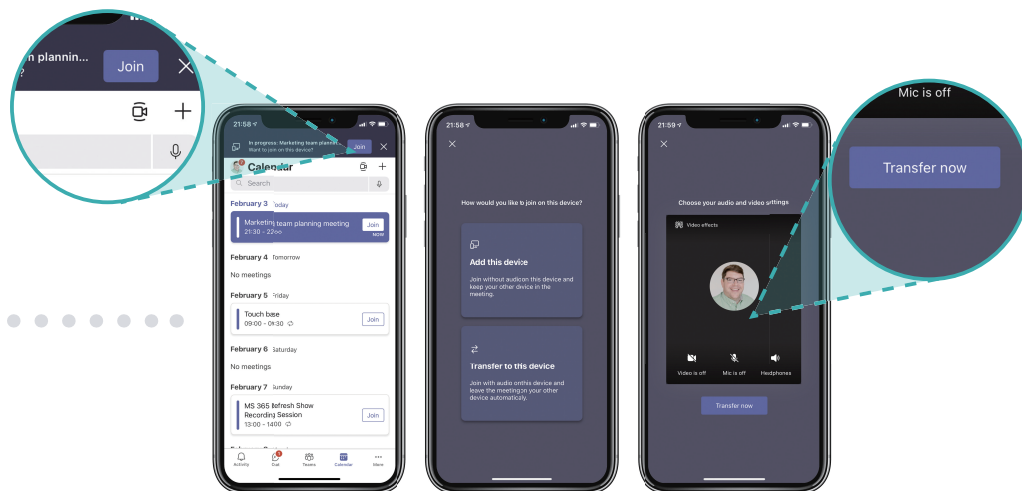


- **You can transfer a desktop call to your mobile device.**

This can be very helpful if you need to get on the road during a meeting. Open the mobile app and you should have an option to join from there. Tap send call to my phone.

- **Zoom in on shared screens if you need to.**

Any attendee can press Ctrl/⌘ and use mouse scrolling to zoom in on a screen shared by someone else.<sup>7</sup>



<sup>7</sup> myteamsday.com

# Wrap Up Your Meeting

## CHAPTER 8

When your meeting is over, don't just hang up. There are some steps to closing out your meeting in a productive way. Follow these steps to ensure a good experience.

- **Identify all action items, assignees, and due dates.**

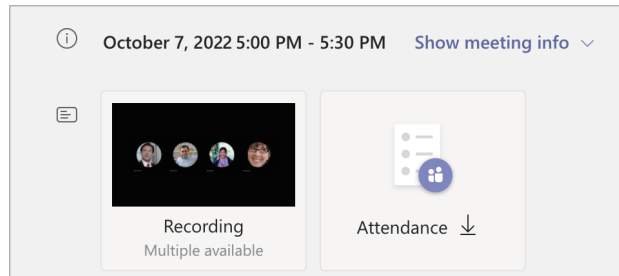
Tasks are almost always an outcome of a meeting. Track them in a central, agreed-to place, like Microsoft Planner, Microsoft Project, To-Do, or another task app you can add as a tab in Teams.

- **Now is the time to set up any follow-up meetings.**

You have everyone's attention and they all have access to their calendars. Talking through schedules is usually the easier than messaging about it later.

- **Share the recording and grab the other meeting artifacts.**

Open the meeting from your calendar to view the meeting recap, which includes the meeting recording, transcript, attendance report, and more. You can share the recording from the OneDrive or SharePoint site where it's stored, even to external people if your organization allows it.





- **Continue chatting if need be.**

The meeting chat will continue to be active after the meeting. If you have follow-up information to share, the meeting chat is a great way to do it. The meeting recording is also easily available from here if you want to watch it.

- **Mute, hide, or leave the chat if necessary.**

If you don't want to be notified or bothered by the ongoing meeting chat, you can mute the chat to disable notifications, hide the chat to remove it from your chat listing, or leave it entirely so you never hear from it again. Click the ellipses on the meeting chat for the options.

- **End the meeting.**

Normally, a meeting doesn't end until everyone leaves. But an organizer can [end a meeting](#) by clicking the ellipses on the meeting chat and selecting *End*.<sup>8</sup>



<sup>8</sup> support.microsoft.com



# Keyboard Shortcuts You Need to Know

## CHAPTER 9

### Tips for everyone

Some people absolutely love keyboard shortcuts. Teams has dozens of them. You can find a full list of them by typing /keys into the search bar at the top of the Teams window. But these are the important ones for meetings.

	Windows	Mac
Join from meeting details	Alt+Shift+J	Option+Shift+J
Start a video call	Ctrl+Shift+U	⌘+Shift+U
Toggle audio	Ctrl+Shift+M	⌘+Shift+M
Toggle video	Ctrl+Shift+O	⌘+Shift+O
Toggle background blur	Ctrl+Shift+P	⌘+Shift+P
Open sharing toolbar	Ctrl+Shift+Space	⌘+Shift+Space
Share your screen	Ctrl+Shift+E	⌘+Shift+E



# Matt Wade's Definitive Guide To:

## Rockstar Meetings in Microsoft Teams



## Next Steps & Resources

Get your copy of **Teach Yourself Visually: Microsoft Teams**, the book we wrote to expand on this guide.

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Check out our corresponding **Everyday Guide to Teams Etiquette** for more Teams tips and tricks.

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Try the **Microsoft Teams demo** to get an idea of how Teams works.

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Try **Microsoft Teams for free** before deciding to subscribe to Microsoft 365.

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Download the **Microsoft Teams desktop and mobile apps** for free.

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Keep up with updates and feature rollouts with the **Microsoft Teams Roadmap**.

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Ask questions and help others by joining the **Microsoft Teams TechCommunity**.

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Watch the webinar featuring AvePoint and Microsoft on **How to Achieve 90% Microsoft Teams and Yammer Adoption in 3 Months**.

## About the Author Matt Wade



Matt Wade is an engineer-turned-IT nerd and Microsoft MVP. His career began in the nuclear power design field and ended up in SharePoint adoption, pretty much by mistake. He's best known for his SharePoint and Office 365 infographics—especially the Periodic Table of Office 365—and advocating Microsoft Teams, AI, and chatbots to automate business workloads.

## Special Thanks to Sven Seidenberg



Sven Seidenberg is a Microsoft 365 advocate and Microsoft Teams geek. He started in internal sales for network products and had his first contact with Office 365 during his studies. A few months and a dozen of read blog posts and documentations later, he started his first projects. Sven speaks at various events and blogs for different publications as a guest writer. He consults with various organizations to develop procedures and best practices on how Microsoft 365 apps and services can best help them work more productively and efficiently. He focuses on Microsoft Teams, adoption, and the Power Platform.



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jump to 365 is the entry point to your modern workplace. With tools and resources to help explain the ecosystem to everyday workers, jump to 365 has supported hundreds of thousands of Office 365 users worldwide when deciding which tool to use when, understanding what each app does, and more.

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