



Host a secure financial wellness webinar in Microsoft Teams

Tailored solutions built for
financial services



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Host a secure financial wellness webinar in Microsoft Teams

Collaborate with colleagues, connect with customers, and promote your services with collaborative apps tailored for financial services. Apps in Teams help everyone better meet the demands associated with supporting hybrid customers by connecting them to the information, expertise, and tools they need to collaborate all in one place.

Scenario

- Planning a financial wellness webinar
 - Schedule a webinar to excite and educate prospective clients about how financial services products could improve their financial future.
- Hosting a webinar
 - Launch the secure webinar for participants.
- Attending a webinar
 - Guests attend the webinar from any device—even if they don't have a personal Teams account.
- Measuring the impact of a webinar
 - Leverage built-in reporting to review attendance and engagement metrics.

For each scenario

- Scenario vision
- Primary persona
- Scenario storyboard
- Solution design best practices
- Solution architecture



Financial services

Planning a financial wellness webinar



Scenario vision

Context



Webinar organizer Daniela heads the events and outreach team at Contoso Bank. She's tasked with promoting a new product offering that can help college graduates plan for their financial future. To market the new product, she would like to host an informative webinar for a local university.

Current state

Webinar organizer Daniela has a lot of work to do:

- ⚠ Her lead tracking app and webinar tools don't talk to each other, information must be transferred manually between tools.
- ⚠ Scheduling the webinar requires cross-checking multiple calendars. Daniela has no way to share webinar information with presenters so they can prepare, she has to send one-off emails to the group. Every time something changes, she must send a new email.
- ⚠ For compliance, Contoso Bank must obtain and track customer consent to follow up after the webinar so Daniela builds a separate spreadsheet.
- ⚠ Generating a social link requires using unsanctioned third-party services.
- ⚠ The webinar tool does not provide attendance reporting or participant feedback, so she's not sure if people were paying attention, or it was effective or not.

Future state

Webinar organizer Daniela quickly schedules the webinar and gets back to strategic projects:

- ✓ Daniela transfers the webinar invite list in just few clicks because her customer relationship management (CRM) solution and webinar apps are both in Teams.
- ✓ Event presenters have visibility into event details like date, time, and location. No need for Daniela send a one-off email.
- ✓ Standardized customer consent forms are centrally updated and published for use with webinars.
- ✓ Daniela easily copies an automatically generated webinar link and adds it to a social post—there is even a short-link for customers to reshare!
- ✓ To make the webinar interactive and engaging, presenters use quick response (QR) codes and in-event prompts for live feedback. Daniela can even download an automatically generated attendance list and check post-event feedback to measure the success of the event.

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Track company webinars with one view

- Check the calendar
- Get an overview of upcoming webinar events
- Stream a recorded webinar

The screenshot displays the 'Contoso Webinar' dashboard. At the top, there is a search bar and navigation links for 'Dashboard' and 'About'. A sidebar on the left contains icons for Activity, Chat, Teams, Calendar, Calls, Files, and Contacts. The main content area is divided into several sections:

- Covid-19 updates:** A card with a 'View all' link and a 'Join' button.
- Featured:** Three cards for 'The Normalization of Crypto' and 'Future Consumer 2023', each with a 'Join' button and participant count.
- On your calendar:** A list of upcoming webinars with 'Join' and 'Copy link' buttons.
- Popular today:** A table showing the most popular webinars.
- Top live:** A list of currently live webinars.

At the bottom of the dashboard, there are three circular progress indicators with values 128, 13%, and 2.3%. The Windows taskbar at the bottom shows the date and time as 10/6/21, 9:28 AM.

Webinar	Time	Participants	Action
2023 Get Smart About Credit: Personal...	12:00 PM - 1:30 PM	340	+ Add to my calendar
401(k) Plan Administration - Is There...	12:00 PM - 1:30 PM	340	+ Add to my calendar
ABA Model Risk Management Webinar	12:00 PM - 1:30 PM	340	+ Add to my calendar

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Easily create new webinar events that work with everyone's schedule

- See what else is planned for the week
- Check event details and presenter comments
- Review presenter schedules

The screenshot shows a Microsoft Teams interface. At the top left, there is a user profile picture. The main window displays the 'Contoso Webinar' dashboard with a 'New webinar' button. A 'Webinar Calendar' overlay is open, showing a weekly view for February 6, 2022. The calendar grid includes the following events:

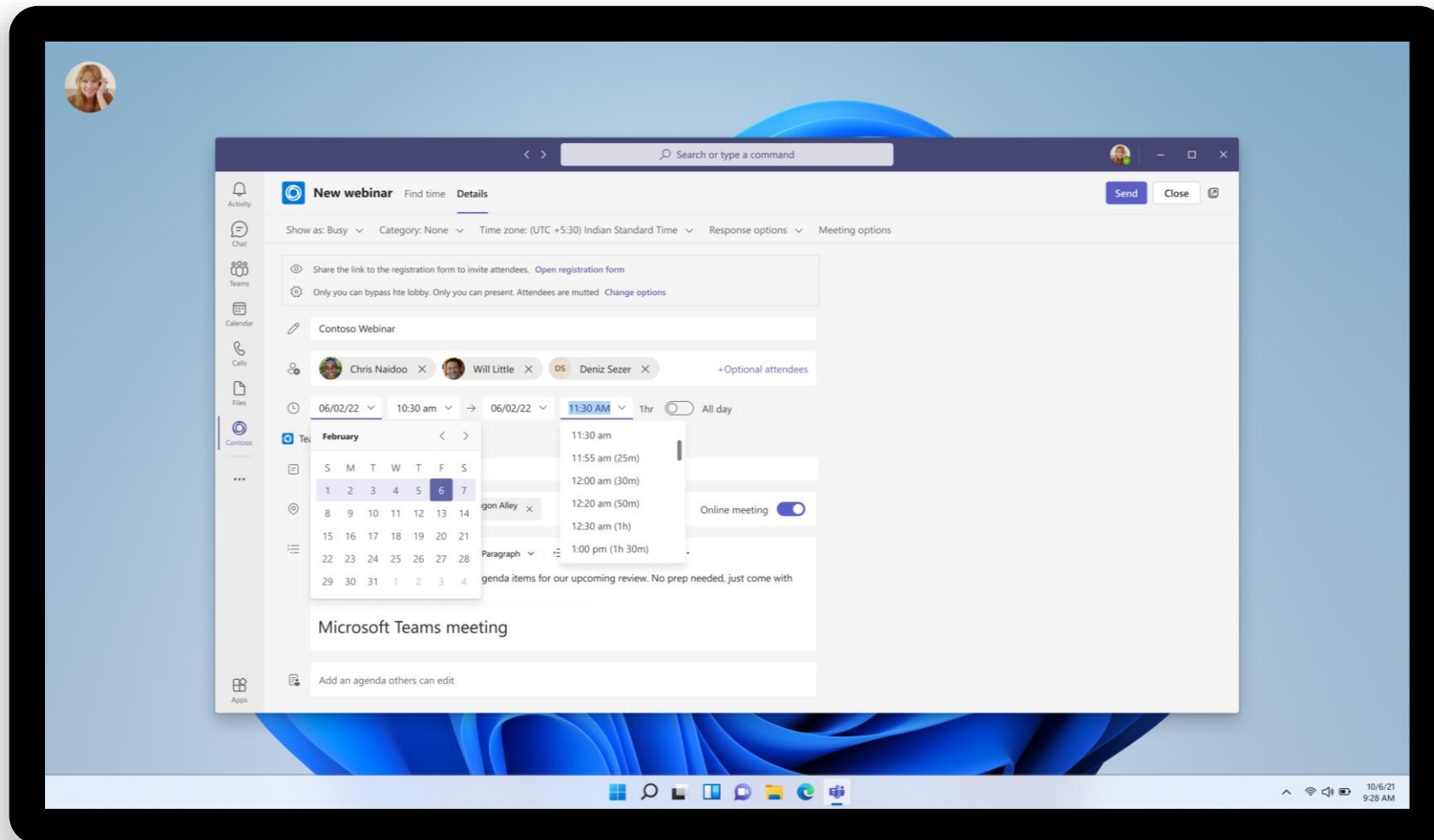
Day	Event	Time	Presenter
Monday (Feb 7)	Creating a new account	11:00 AM - 12:00 PM	Eric Ishida
Tuesday (Feb 8)	How to update your bank info	9:00 AM - 10:00 AM	Amanda Brady
Wednesday (Feb 9)	Investment account	8:30 AM - 9:30 AM	[Multiple presenters]
Wednesday (Feb 9)	T1 Interview	10:00 AM - 11:00 AM	Erika Fuller
Wednesday (Feb 9)	PNC new policy update	11:30 AM - 12:30 PM	Cassandra Dunn

The system tray at the bottom right shows the date and time as 10/6/21, 9:28 AM.

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Increase transparency by assigning webinar details and presenters from the start

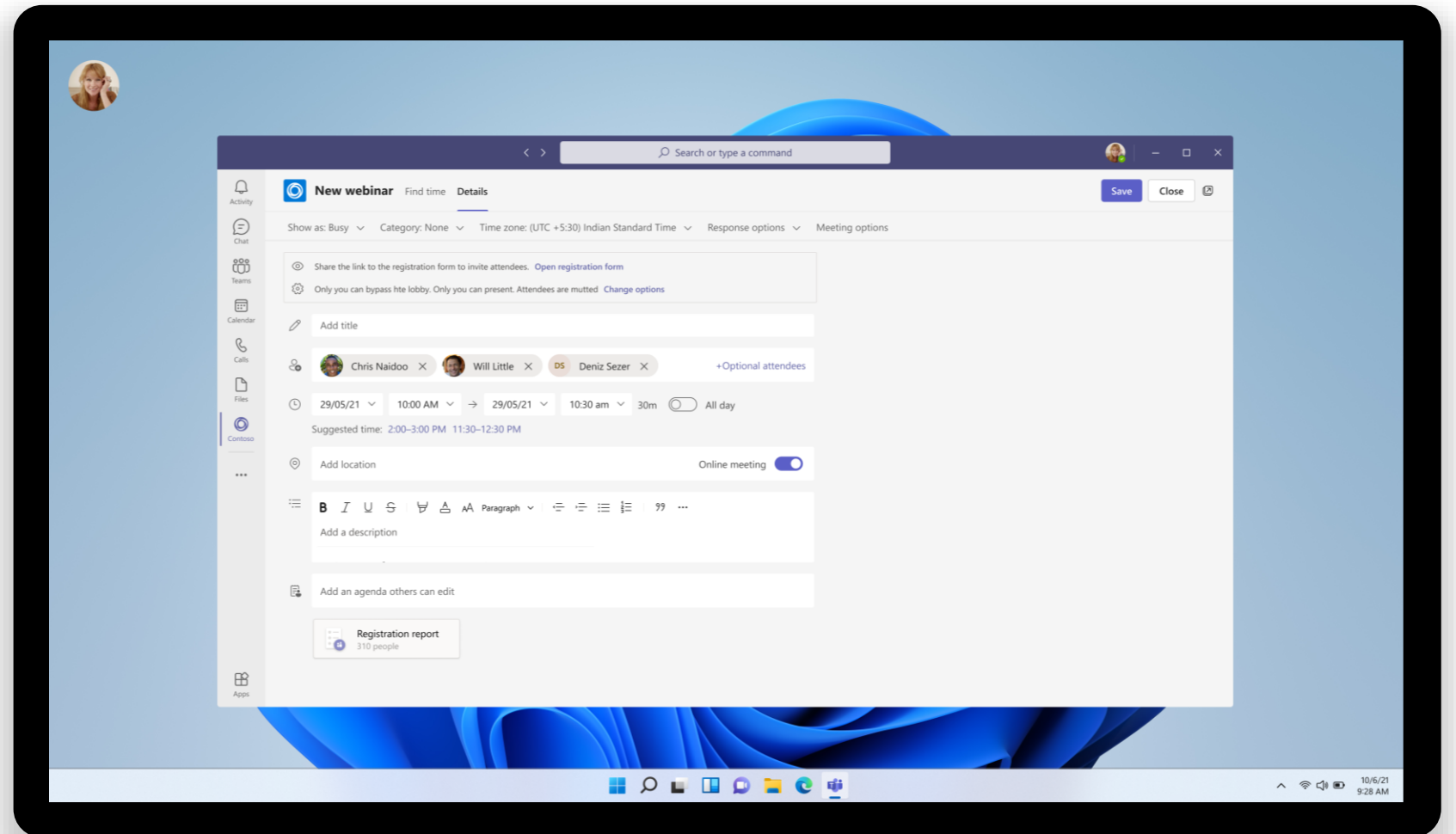
- Add event notes only the speakers can see
- Notify presenters to confirm and hold their availability



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Streamline webinar workflows with automatic features

- Apply default, admin-enabled settings to help ensure a secure and compliant experience
- Generate a social-ready shareable link



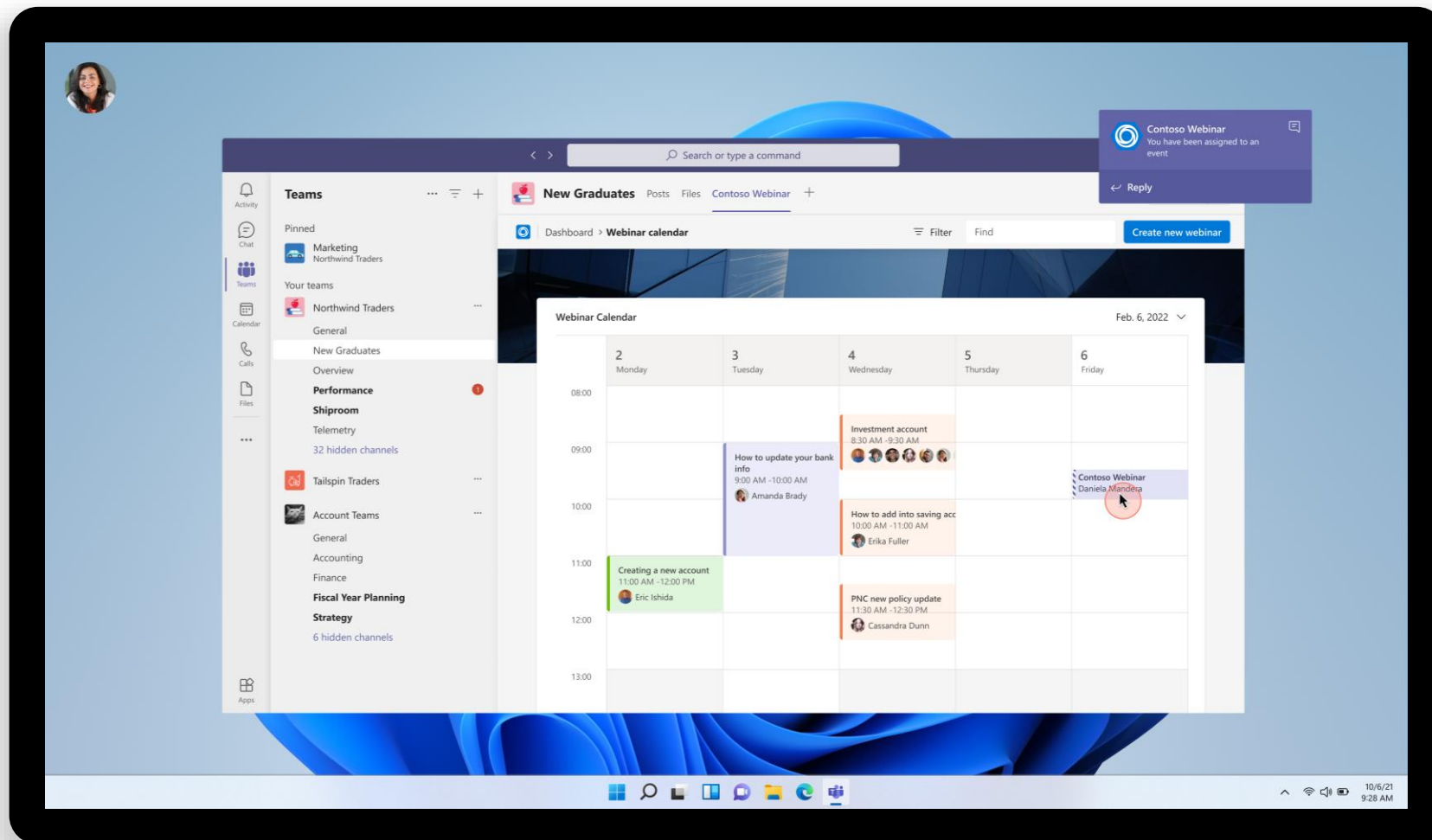
Financial services – Teamwork solutions

Hosting a webinar



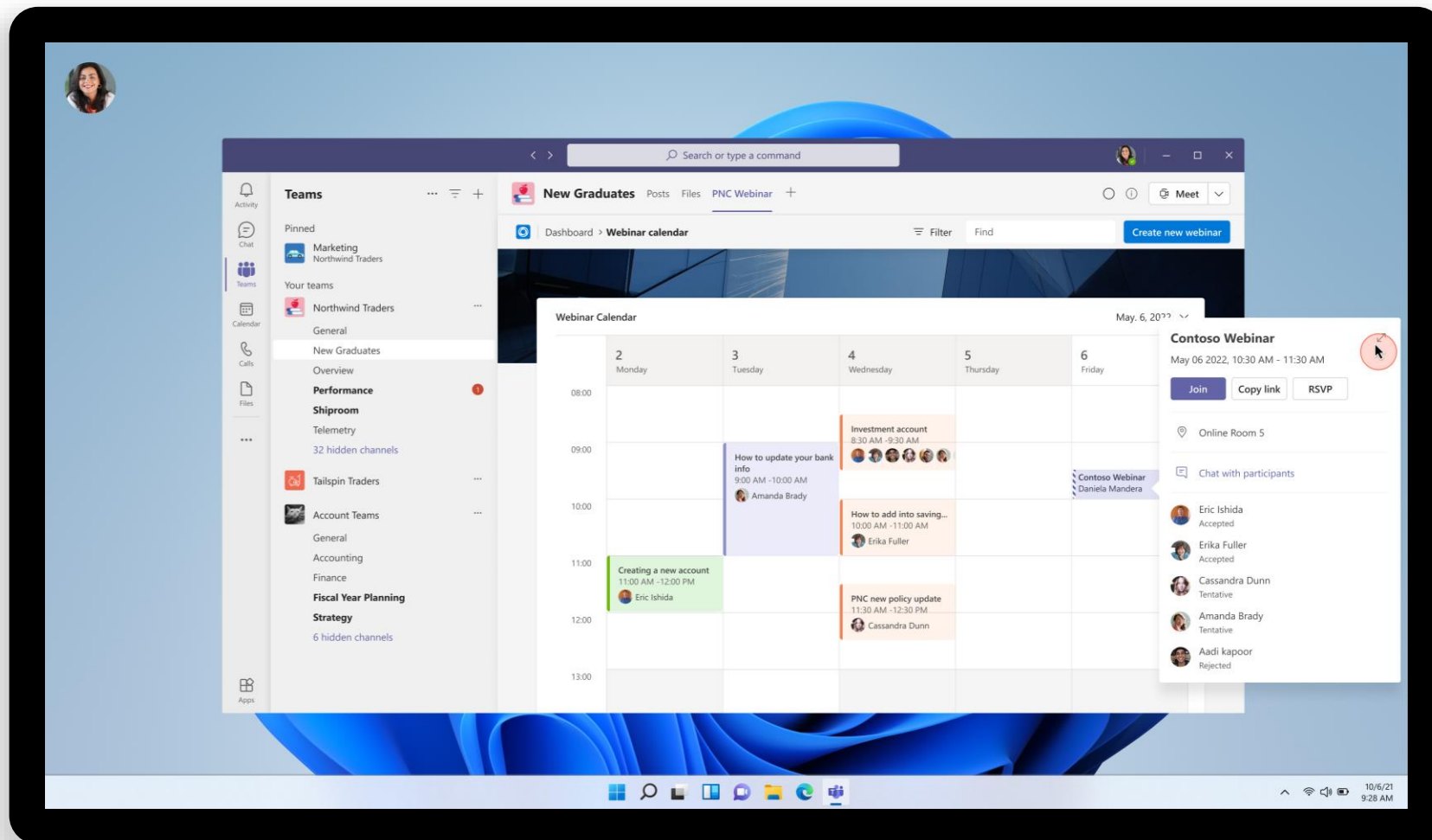
Financial services –
Financial wellness webinar

Automatically notify
presenters and hold their
calendars, giving them
more time to prep



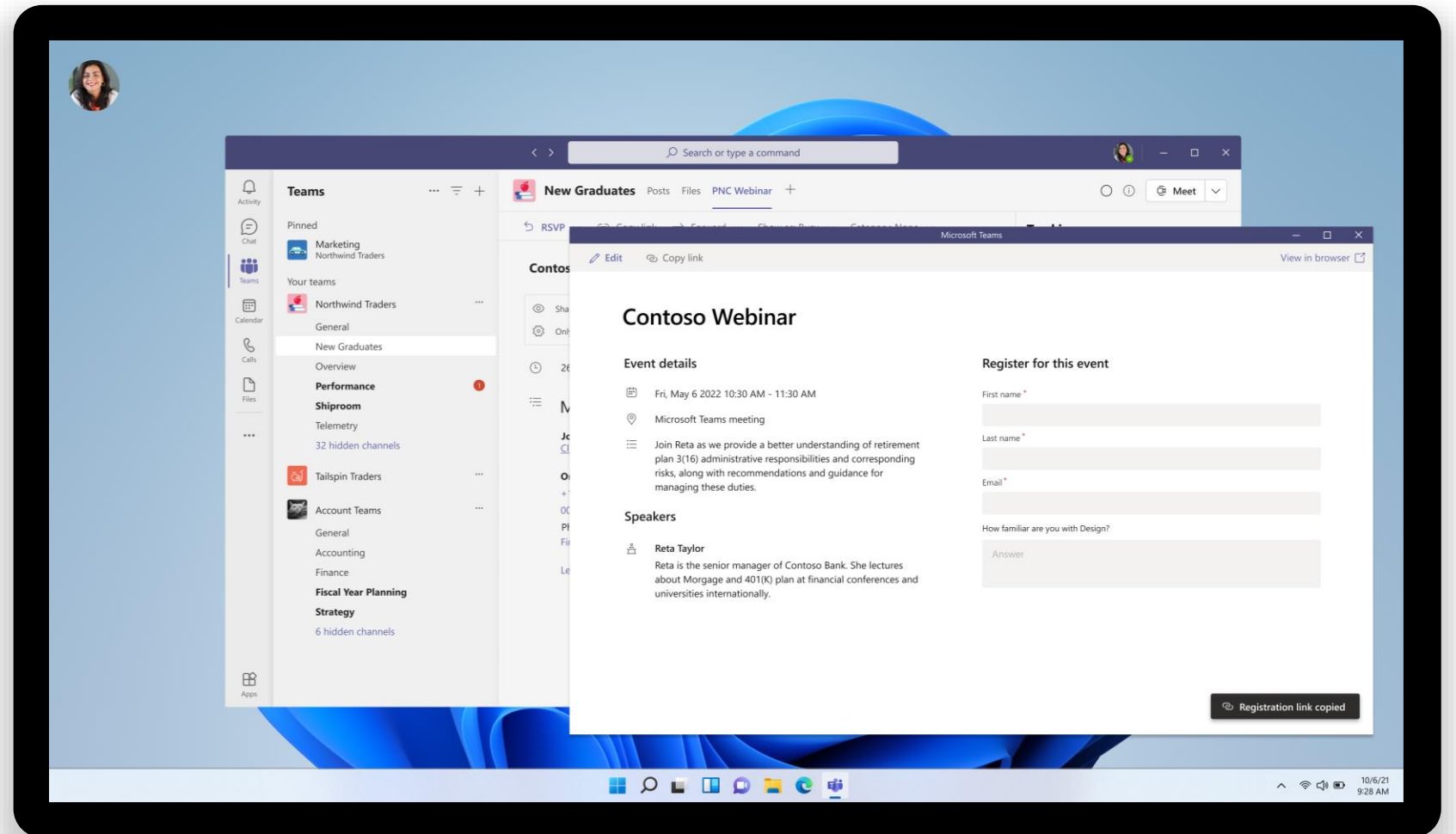
Financial services –
Financial wellness webinar

Review all event details
right from the invite,
even on the Teams app



Financial services –
Financial wellness webinar

Create a custom
registration page to
establish speaker
credibility and entice
sign ups



Financial services – Teamwork solutions

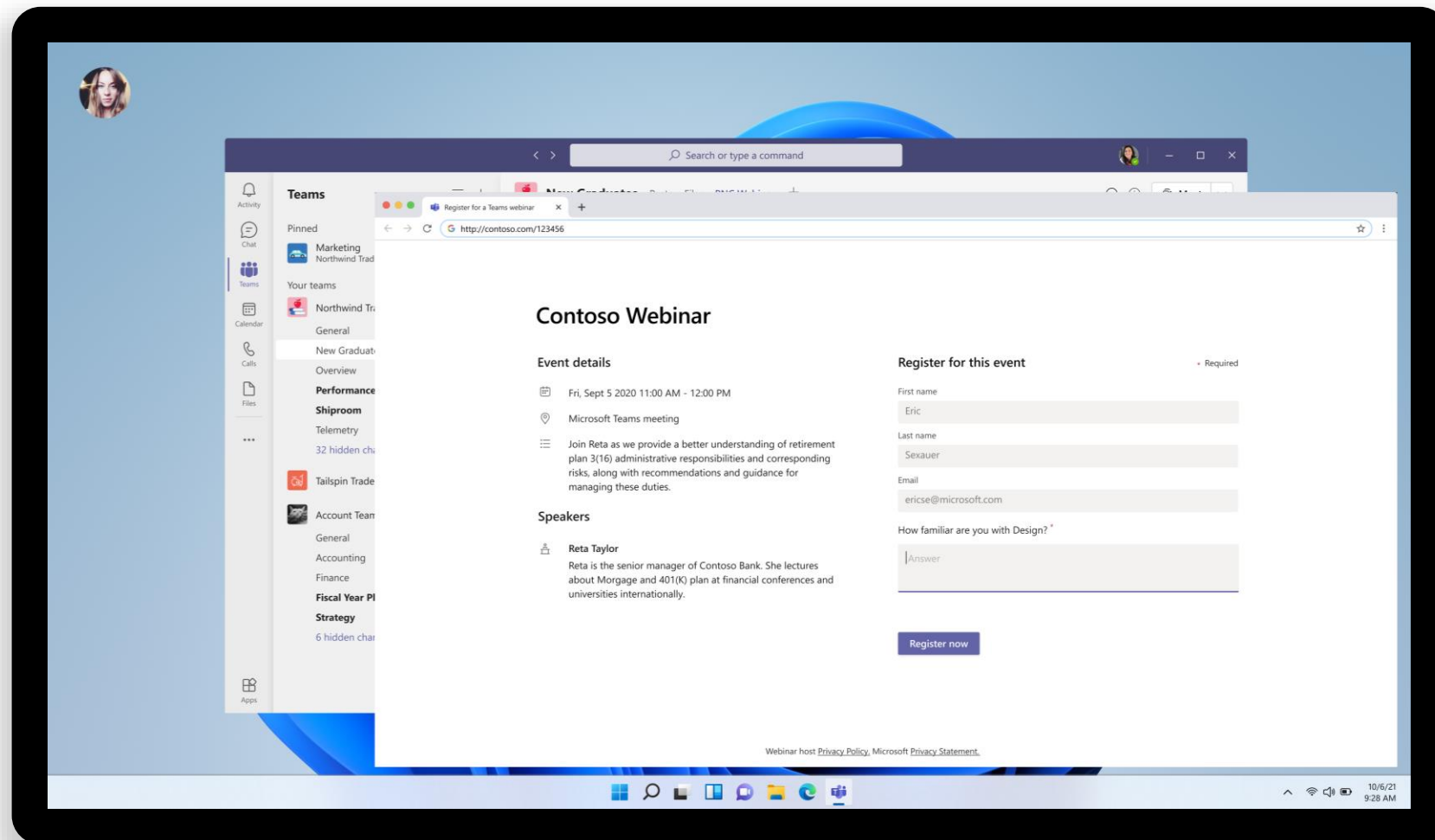
Delivering an engaging webinar experience



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Financial wellness webinar

Simplify the attendee experience with a custom registration page

- Collect key attendee information
- Automatically send a calendar invitation with a link to join the webinar



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Financial wellness webinar

Provide a great experience from the moment your audience clicks to join

- Enable a virtual lobby until the presenter is ready
- Silence attendee microphones to eliminate background noise
- Make the webinar more accessible with automatic transcription or optional Communication Access Realtime Translation (CART) captions



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Financial wellness webinar

Keep a webinar interesting with features that make it easy to stay engaged

- Share a video
- Click through a presentation
- Post a real-time meeting poll



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Financial wellness webinar

Launch interactive QR codes or forms to collect instant audience feedback

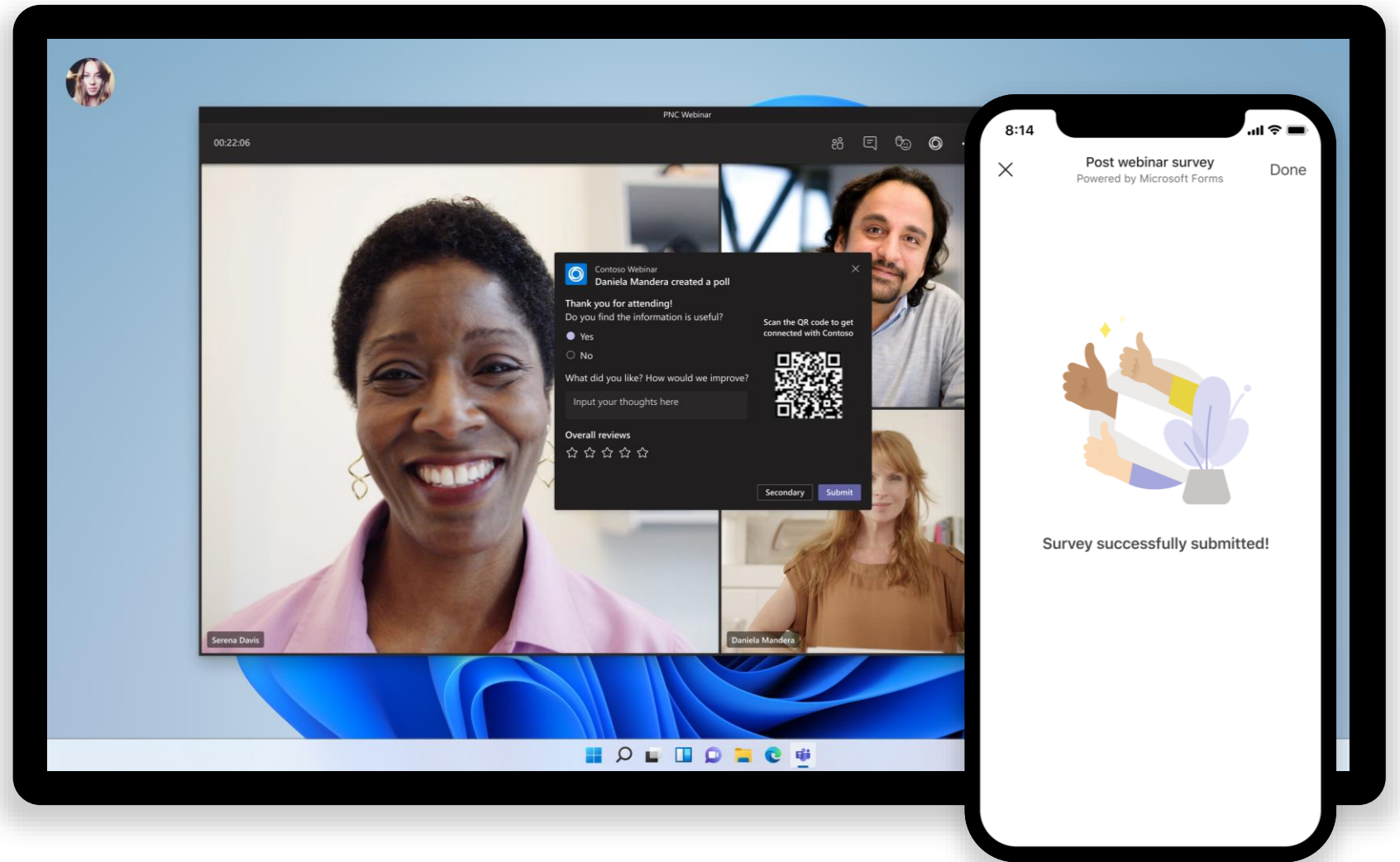
- Build-trust with a contact opt-in option
- Enable attendees to request time with a financial advisor
- Offer resources to learn more



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Close the webinar by opening the door to new business

- Launch a form attendees can fill out—even on their phone—so collect their contact information
- Easily review new leads in a connected CRM system



Financial services

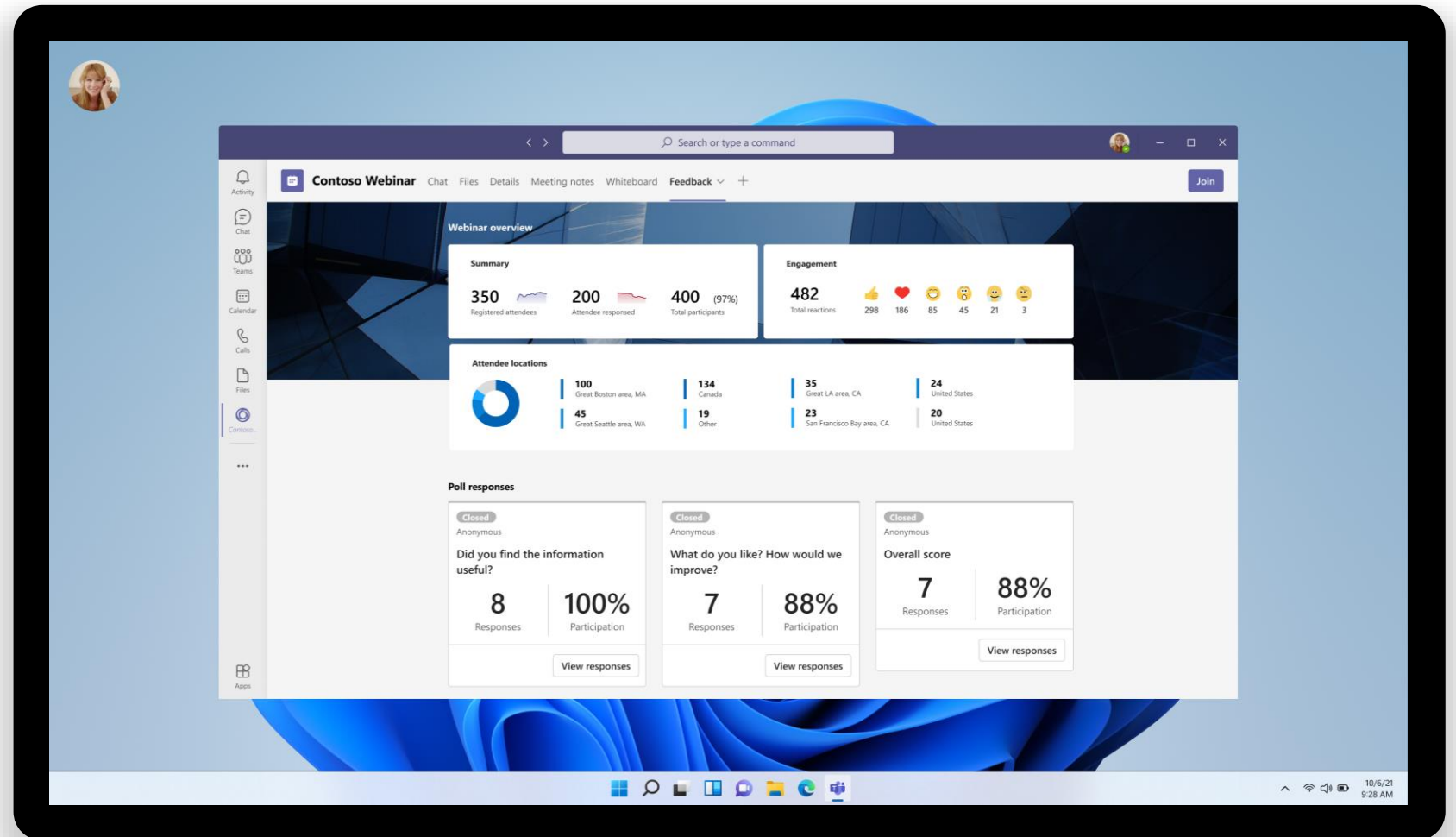
Measuring the impact of a webinar



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Easily review webinar metrics in a single dashboard

- Event attendance
- Engagement metrics
- Attendee post-event survey results



Solution highlights – best practices

Key solution design considerations



Platform extension points

- Organizers are provided a pinned, easy-to-access [personal app](#), which includes a dashboard overview of all events scheduled.
- Presenters are provided a [channel tab](#), allowing them to coordinate schedules and responsibilities as a group. A connected **bot** automatically notifies anyone in this channel when events are changed, for example, when another presenter adds an event agenda or notes.
- During the meeting, [meeting extensibility](#) options enrich the attendee experience, enabling interactive features like forms or QR codes.
- Attendee responses can be integrated into existing CRM solutions.

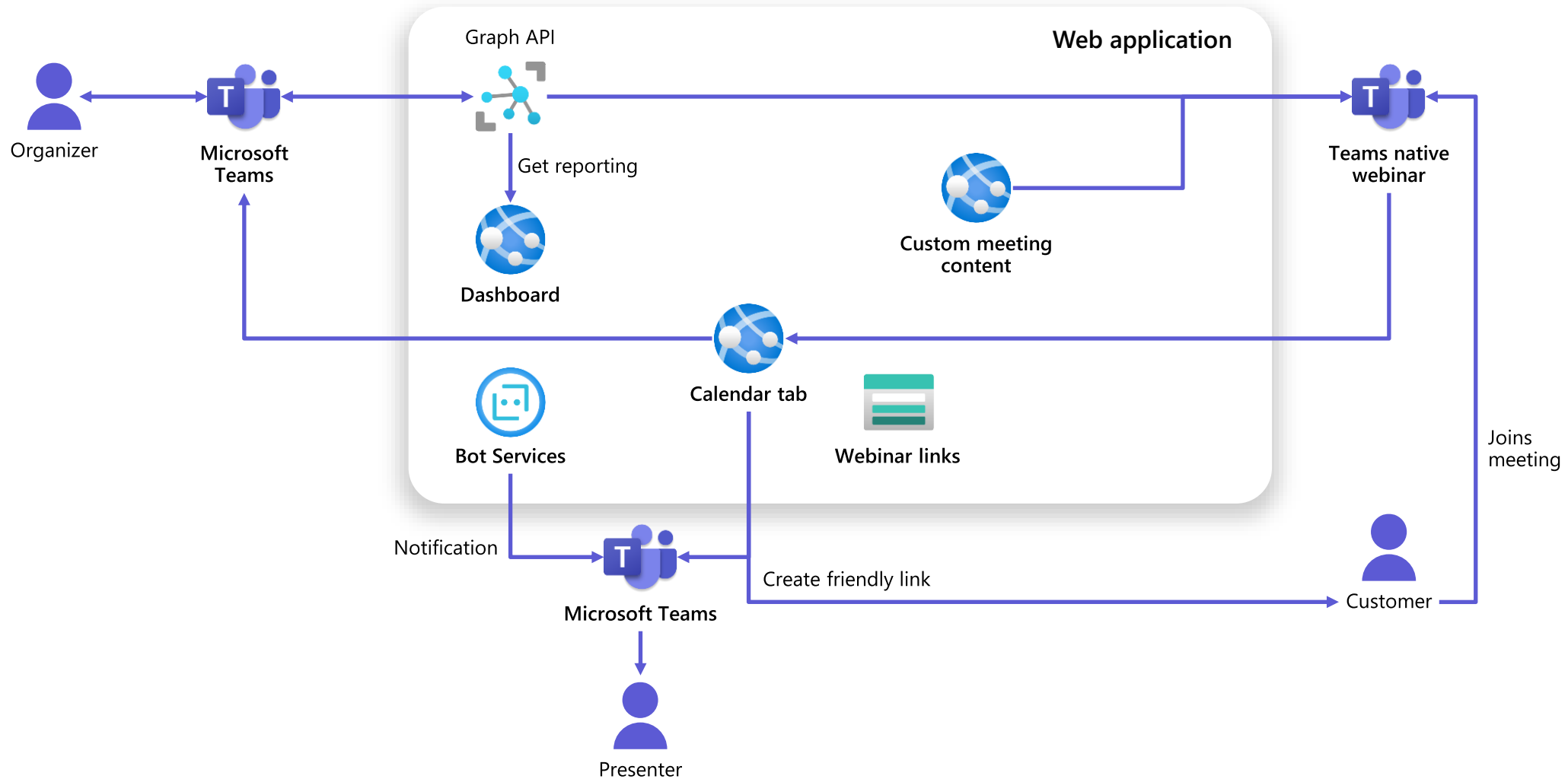
User experience

- The Teams Platform enables webinar solutions including:
 - [Proactive messages](#) and [activity feed notifications](#) that notify presenters when they have a new event assigned.
 - A **meeting stage** that provides a rich meeting experience.
 - [Dashboard](#) components that visualize reporting.

Graph API

- [Create online meeting](#) and [external meeting registration](#) Graph APIs for Microsoft Teams webinars.
- [Meeting registration](#) and [attendance report](#) APIs retrieve information for reporting.

Solution architecture



Thank you

