



Connect information and experts in Microsoft Teams

Tailored solutions built for the
professional services industry



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Kickstart professional service engagements using apps in Teams

Connect everyone in the flow of work with collaborative apps tailored for professional services. Apps in Teams help everyone better meet the demands associated with sharing resources and ideas by connecting them to the people, information, and tools they need to collaborate and get work done all in one place.

Scenarios

- Starting a new engagement
 - Sourcing documents, connecting with experts, and creating a Teams workspace.
- Sharing information via chat
 - Using a message extension to surface and share resources via chat.

For each scenario

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



Professional services – teamwork solutions

Starting a new engagement



Scenario vision

Context



Project Manager Daniela is managing a professional services (PS) engagement for a priority client at Contoso PS. To deliver quality work on a tight timeline, Daniela needs immediate access to subject matter experts (SME) and resources.

Current state

Starting an engagement is tedious and time consuming.

- ⚠️ To source reference information and helpful templates, Daniela must repeat the same document search several times across different apps and tools—many of which she can't use on the go.
- ⚠️ Once Daniela finds a helpful document, she uploads it manually to a separate app so her team can access it.
- ⚠️ To bring in a subject matter expert (SME) for this engagement, Daniela sends an ad-hoc email to a distribution list. She can't be sure that whoever responds is the best fit for the project but doesn't have a better way to connect with experts.
- ⚠️ It takes Daniela a while to finally create a collaboration workspace for this engagement. Starting from scratch, she adds the Contoso PS team and project SME, then loads all the resources she found.

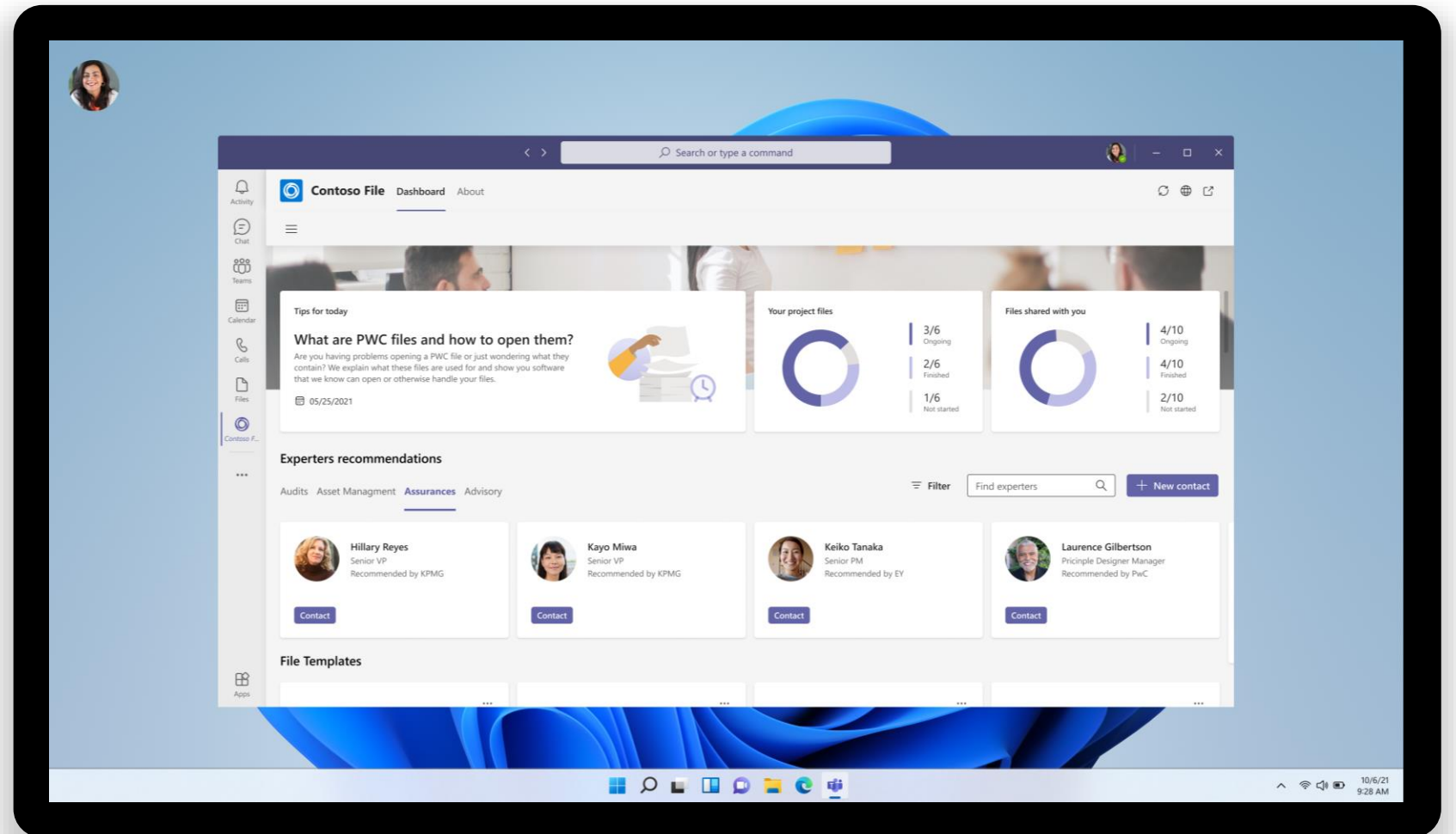
Future state

A personal app in Teams makes starting an engagement fast and easy.

- ✓ Through a personal app pinned to Daniela's Teams workspace, she can search for information and templates, even on the go.
- ✓ Daniela's search successfully displays the document templates and resources she needs. She can now share the resources with her project team directly from the app.
- ✓ Without leaving Teams, Daniela can connect with a SME or community and engage instantly via chat or schedule a meeting for the whole engagement team.
- ✓ Daniela quickly spins up a collaboration workspace for this project. Using a bot, she provisions relevant documents and invites all collaborators.

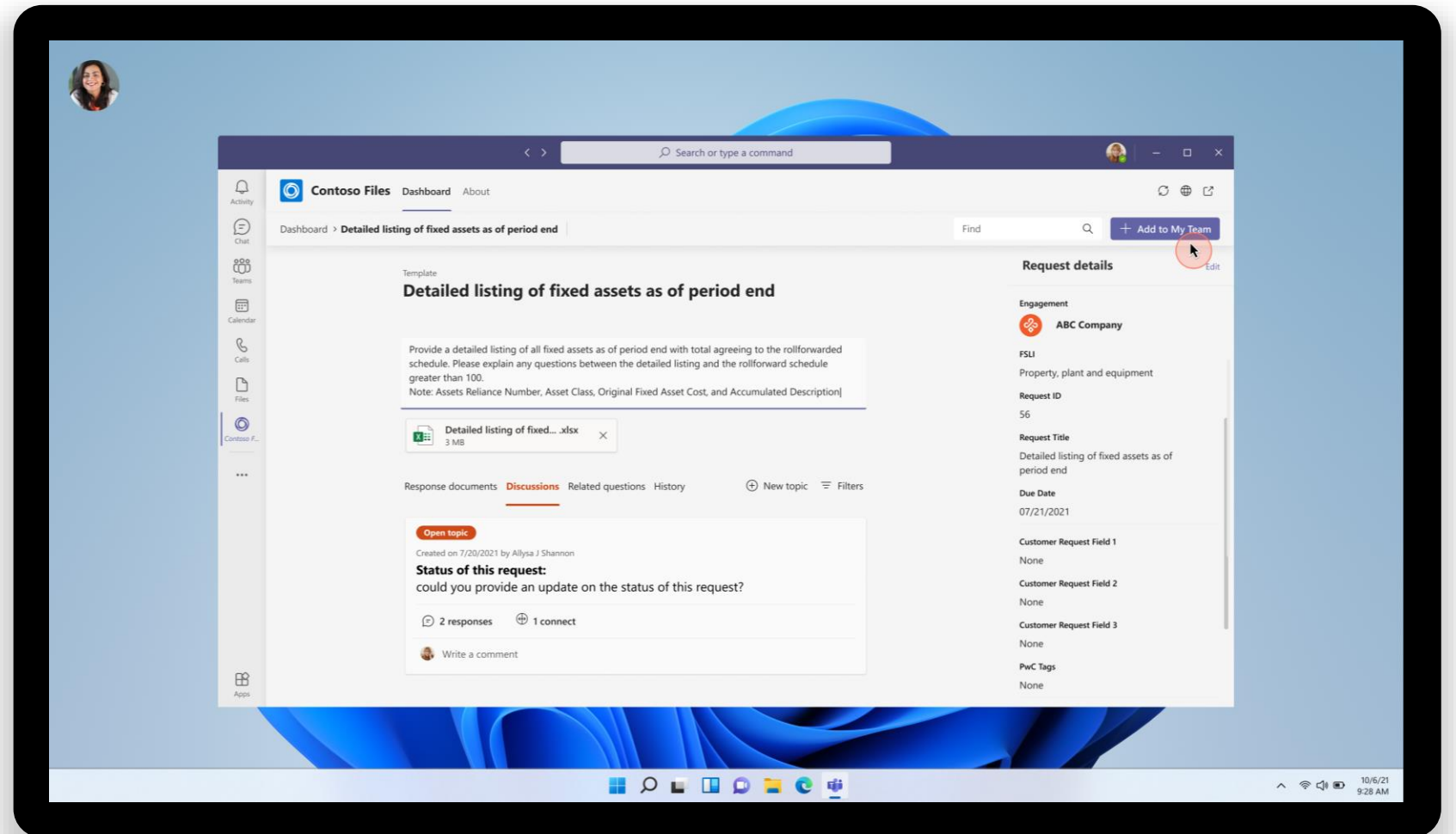
Professional services –
Asset search and sharing

Access documents,
templates, and more
without leaving Teams



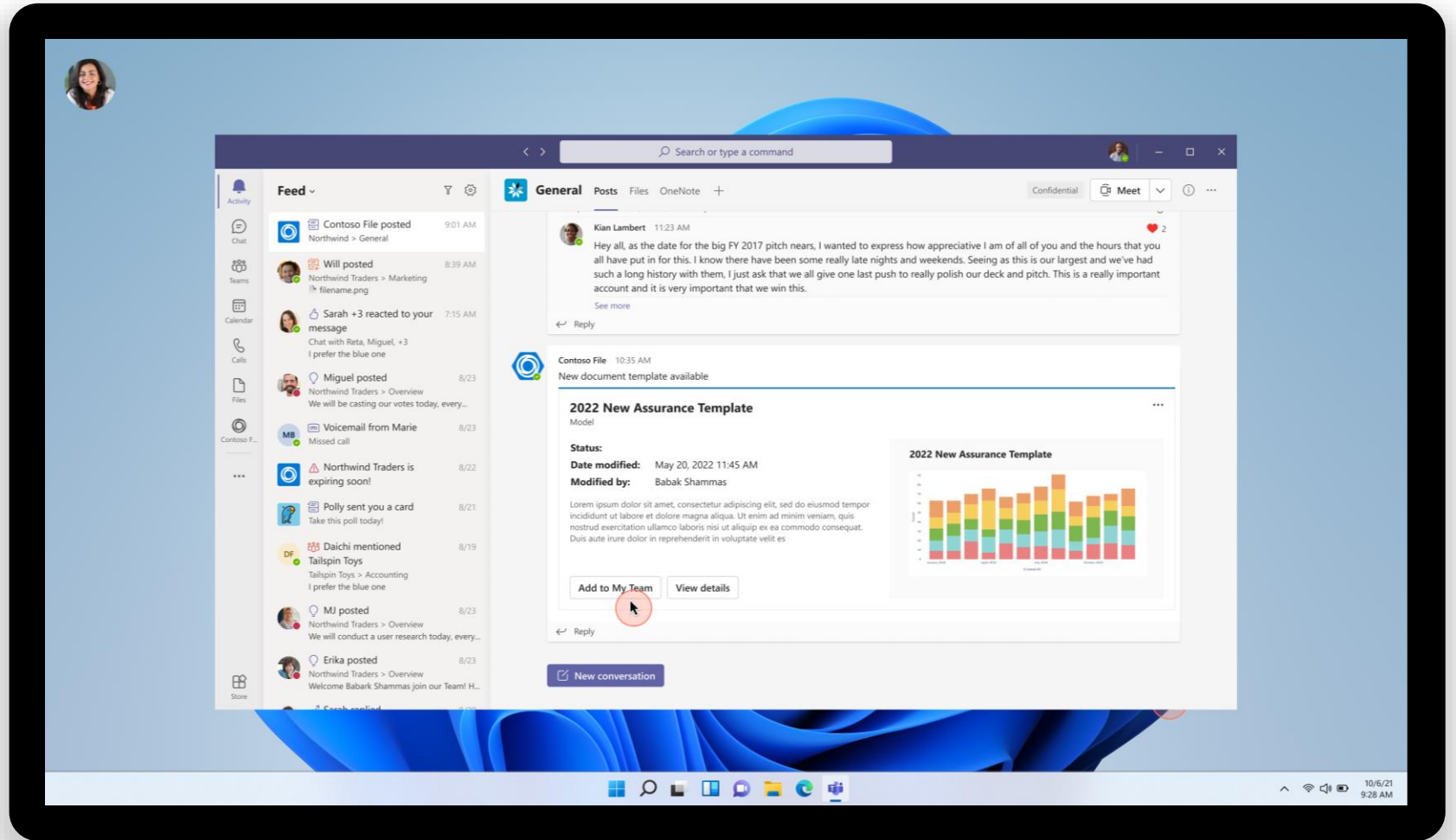
Professional services –
Asset search and sharing

Save time and enable
instant collaboration by
adding resources directly
to a project team



Professional services –
Asset search and sharing

Pull up a bot to quickly
surface helpful
documents in a Teams
workspace



Professional services – teamwork solutions

Sharing information via chat



Scenario vision

Context



Project Manager Daniela collaborates closely with many members of the Contoso PS team to deliver exceptional client work. She spends part of her time meeting with clients in person or heading to the office, which means she needs to stay connected from anywhere.

Current state

Resources are spread across multiple systems, many of which are not mobile-friendly.

- ⚠️ Simply trying to answer a colleague's question derails the project as Daniela searches for information across several tools and apps.
- ⚠️ Daniela must copy the information she found for her team to review. This takes a while, and she often gets pulled to a different workflow before she's done, resulting in incomplete or abandoned information sharing.
- ⚠️ There is no useful directory that Daniela can use to search for a subject matter expert. Even if she finds the right person, she can't easily share contact information with her team.

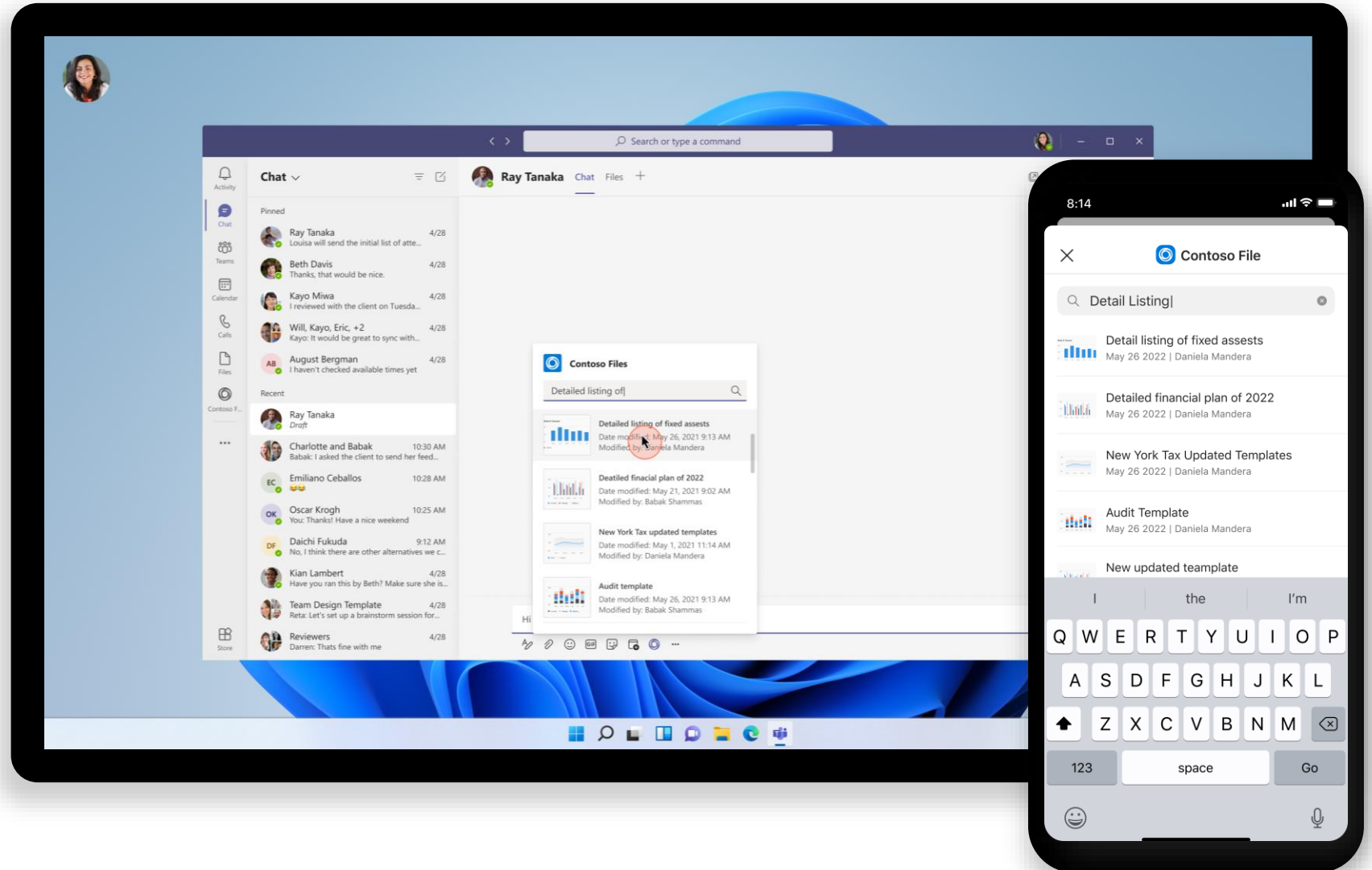
Future state

Apps in Teams make it easy to surface and share knowledge.

- ✓ Answering a colleague's question is fast and easy—Daniela pulls up a message extension from a Teams chat to access reference documents, templates, and an expert finder tool.
- ✓ Daniela can also use Teams chat to share documents and reference library templates, providing colleagues with the information they need in near real time.
- ✓ Using the expert finder tool, Daniela can easily gather a list of SMEs right for this engagement and easily share their contact cards with her team.

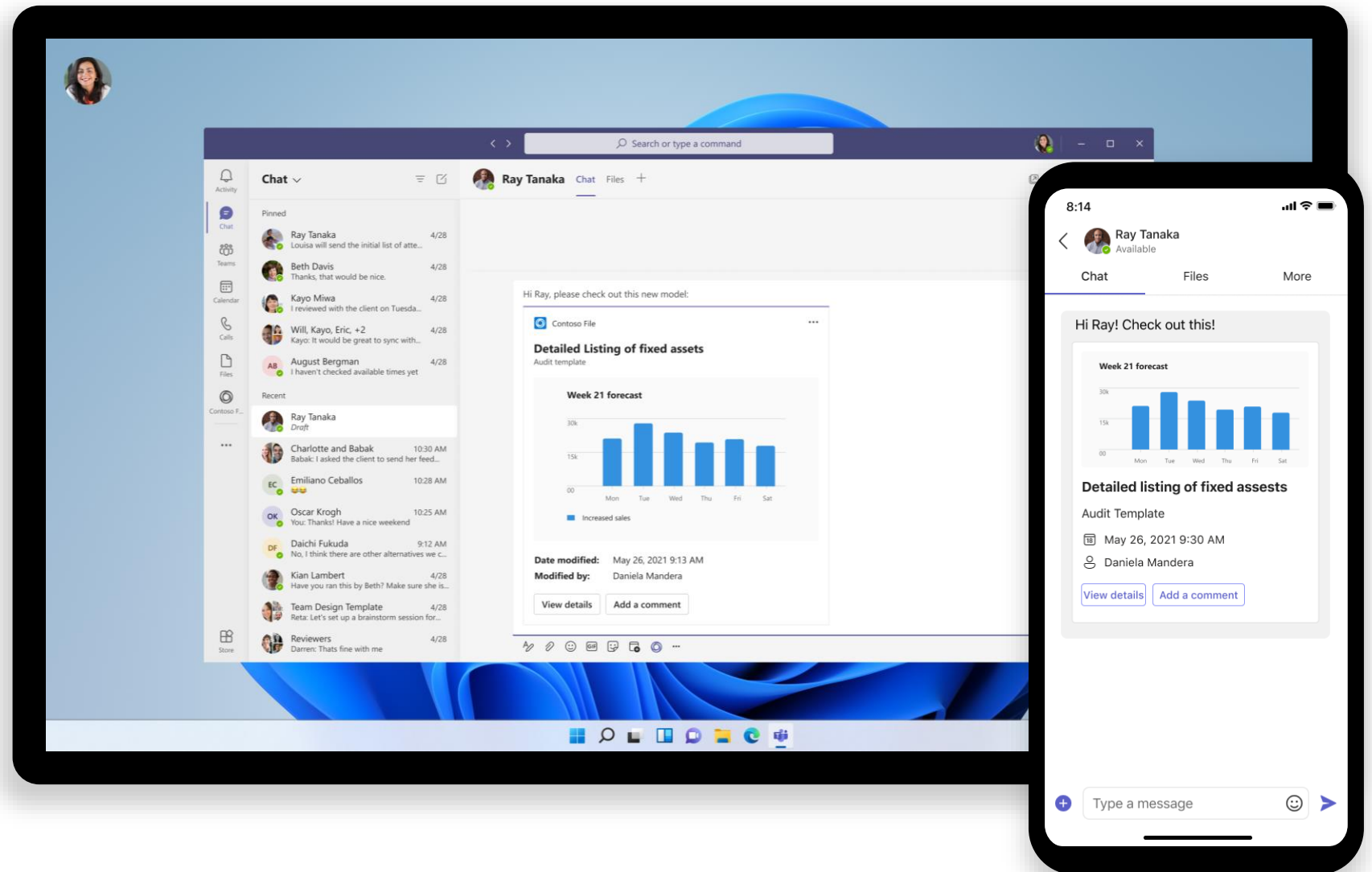
Professional services –
Asset search and sharing

Leverage a message
extension to connect to
documents, templates,
and experts right from
a chat



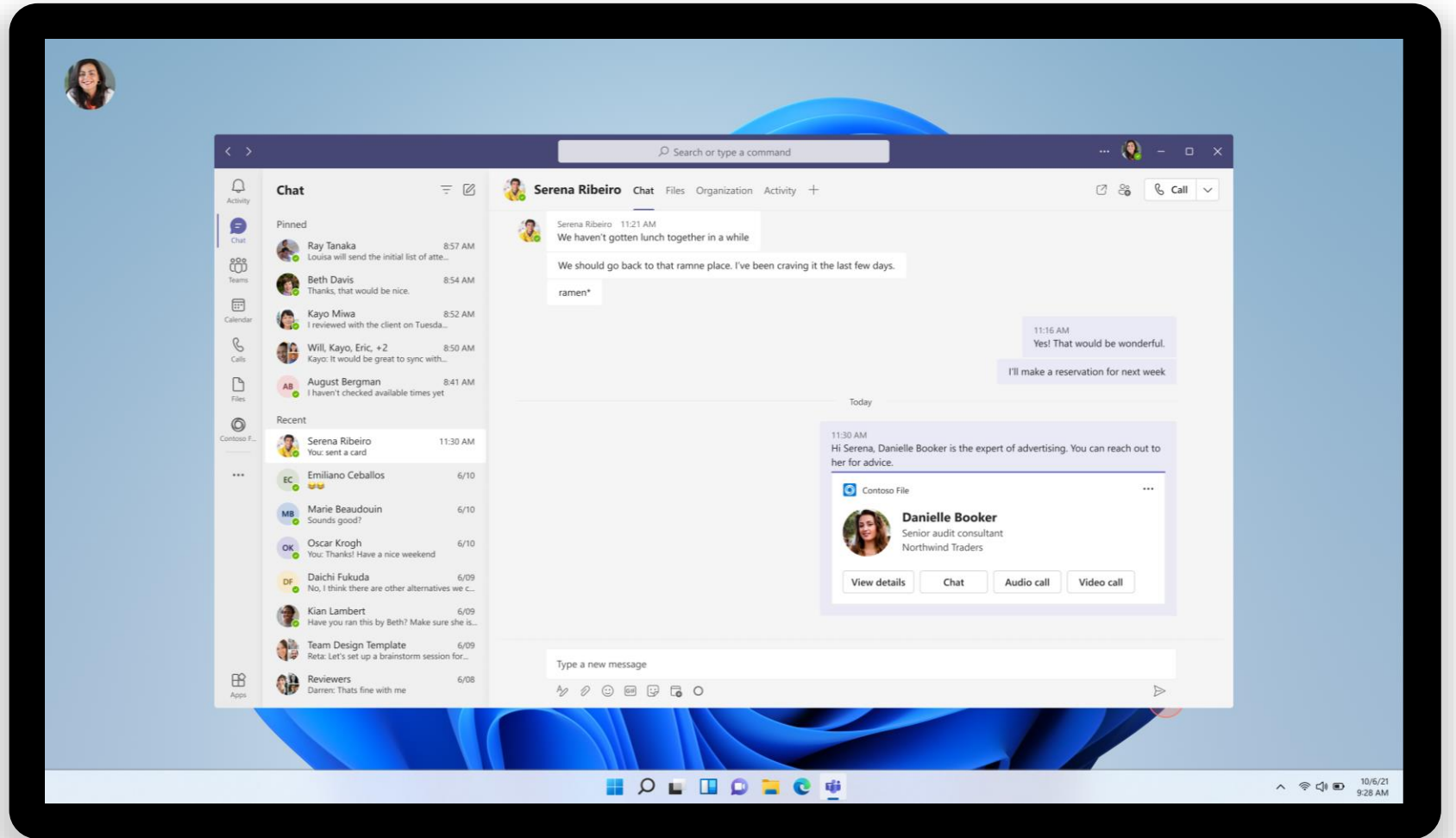
Professional services –
Asset search and sharing

Share documents for
instant collaboration



Professional services –
Asset search and sharing

Find experts, connect
with a click, and share
contact information—
even on the go



Solution highlights – best practices

Key solution design considerations



Platform extension points

- **Personal scoped app** serves as a gateway to the reference document library, is scoped directly to the consultant profile, and is based on their specific role.
 - Personal tab is used to present and search for content (like templates and reference documents) and to upload this content into the Teams workspace.
 - Personal tab is used to find experts, share contact information, or add them directly to a Team.
- **Messaging extension** enables users to search for and share templates, reference documents, and experts, then share findings in the flow of work via a chat or a channel discussion.
- **Channel bot** enables a team owner to set up a team by adding reference documents, templates, and experts by topic.

User experience

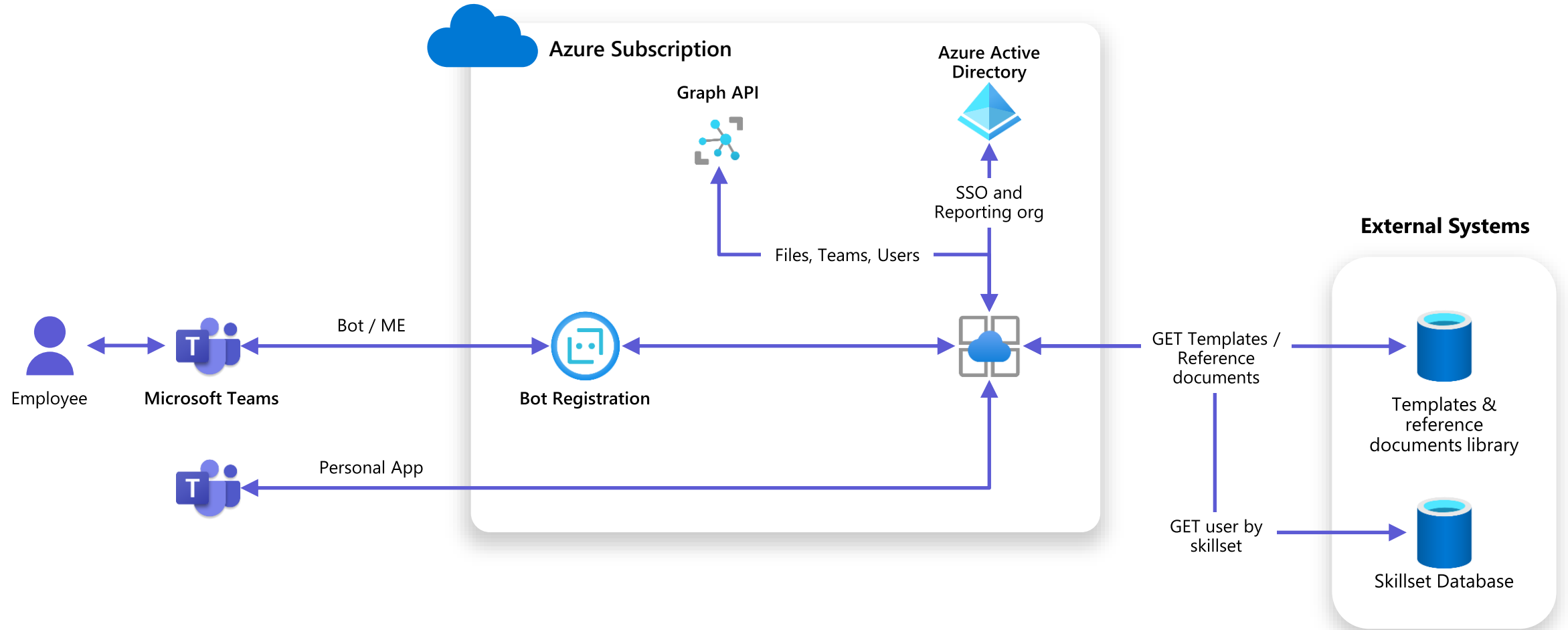
- **Card refreshes** are used to update card status rather than sending several different cards about the same request. This provides better readability and helps prevent the app from spamming users with multiple cards for updates.
- **List cards** are used to provide a single view of documents with an action button to enable adding this to the current working environment directly.

Graph API

The app utilizes:

- **Drive** Graph API to create and copy files in the right team.
- **Team** Graph API to add member to the right team.
- **Users** Graph API to find users and their details.

Solution architecture



Thank you

