Microsoft

Apps in Teams Meetings

A Teamwork Solution Opportunity

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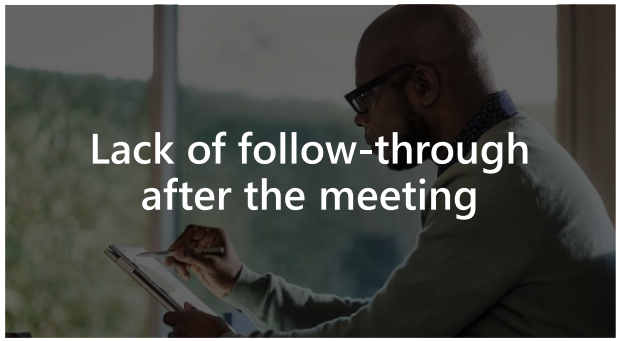
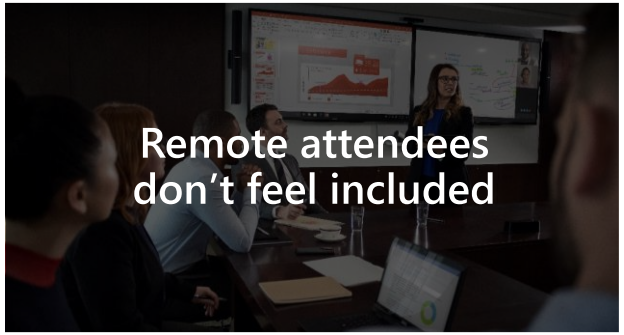
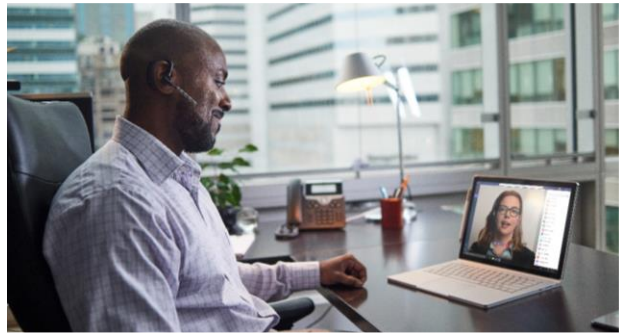
Platform Ecosystem Group
Microsoft Teams Engineering

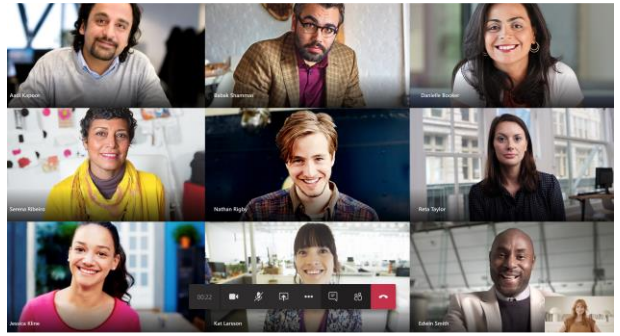


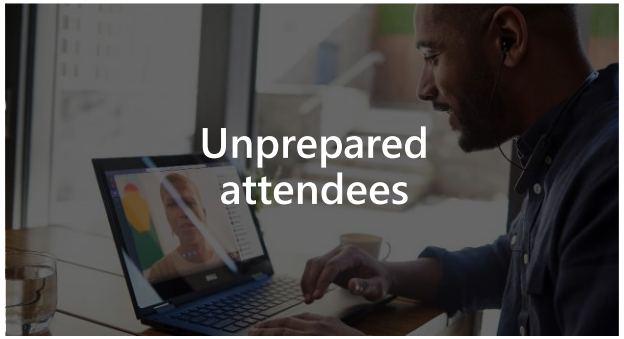


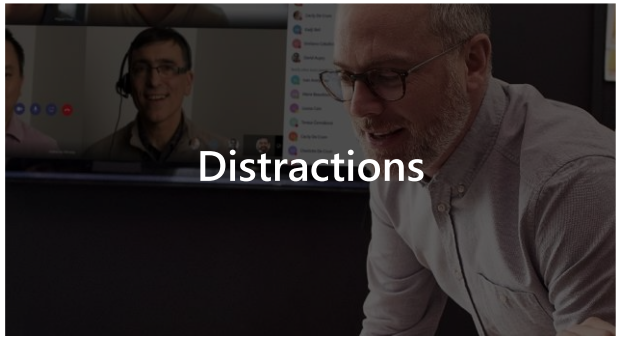
More online meetings than ever.

But how productive are they?

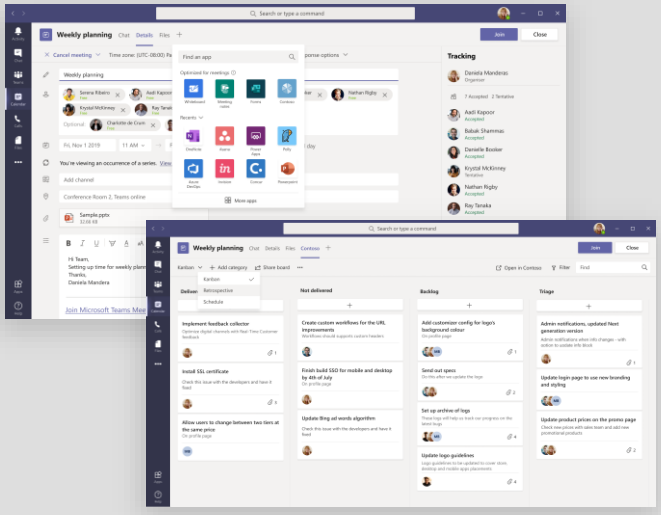


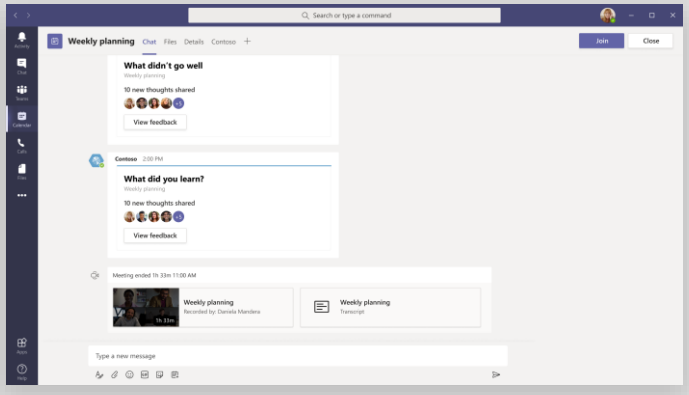






Your workflow in your meeting





BEFORE

Include rich information
Collaborate before the meeting
Identify and add tools

DURING

Enrich engagement & productivity
Reimagine the meeting experience.
Meet in-context of your tools & apps

AFTER

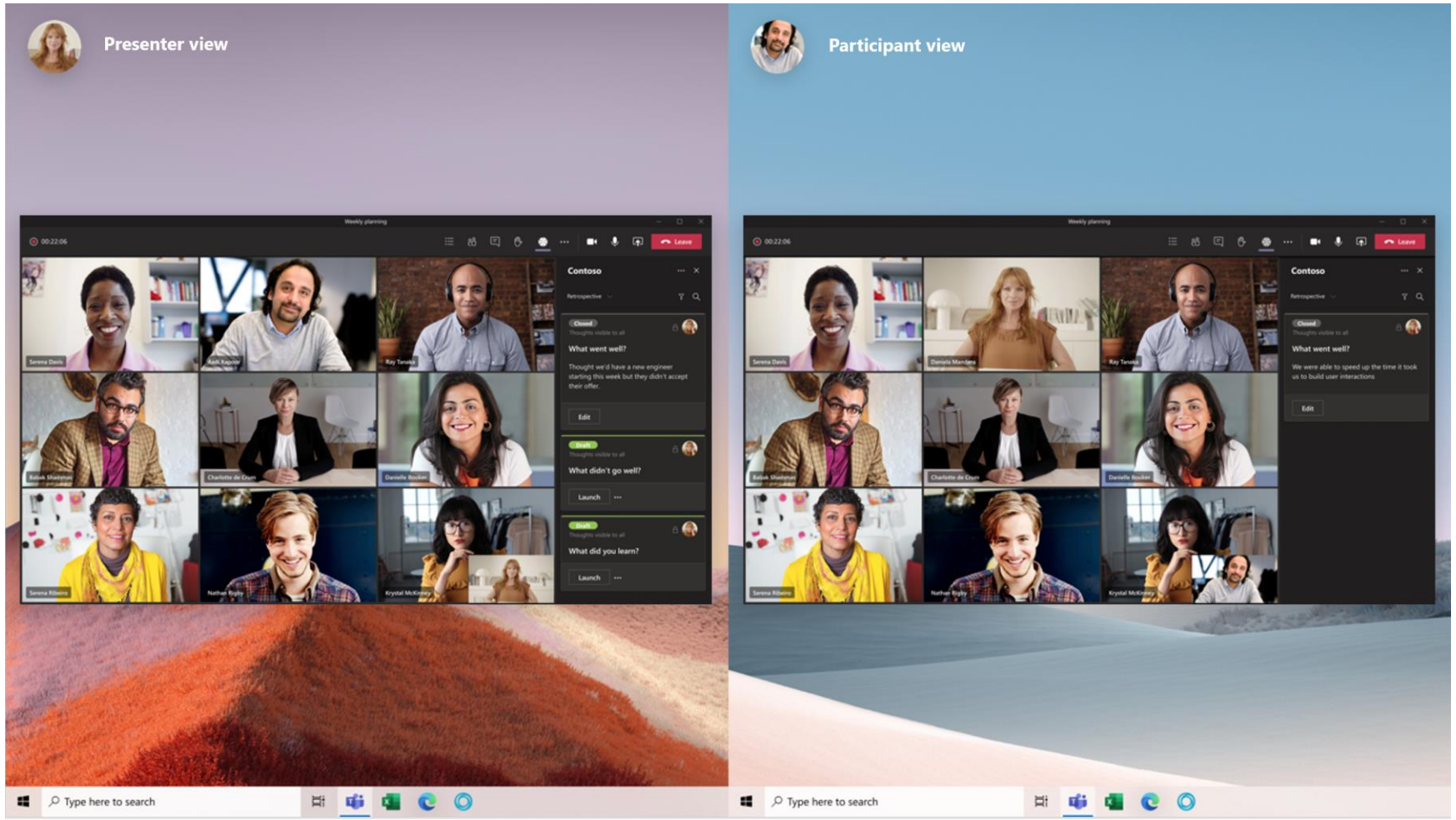
Include meeting artifacts in recap
Track actions and trigger workflows
Extend info protection capabilities

Capabilities of meeting apps

Participant roles

You can design your app with meeting role specific capabilities.

For example, perhaps the organiser and/or presenter can create a poll in meetings and only they can see all responses.



Capabilities of meeting apps

Meeting panel

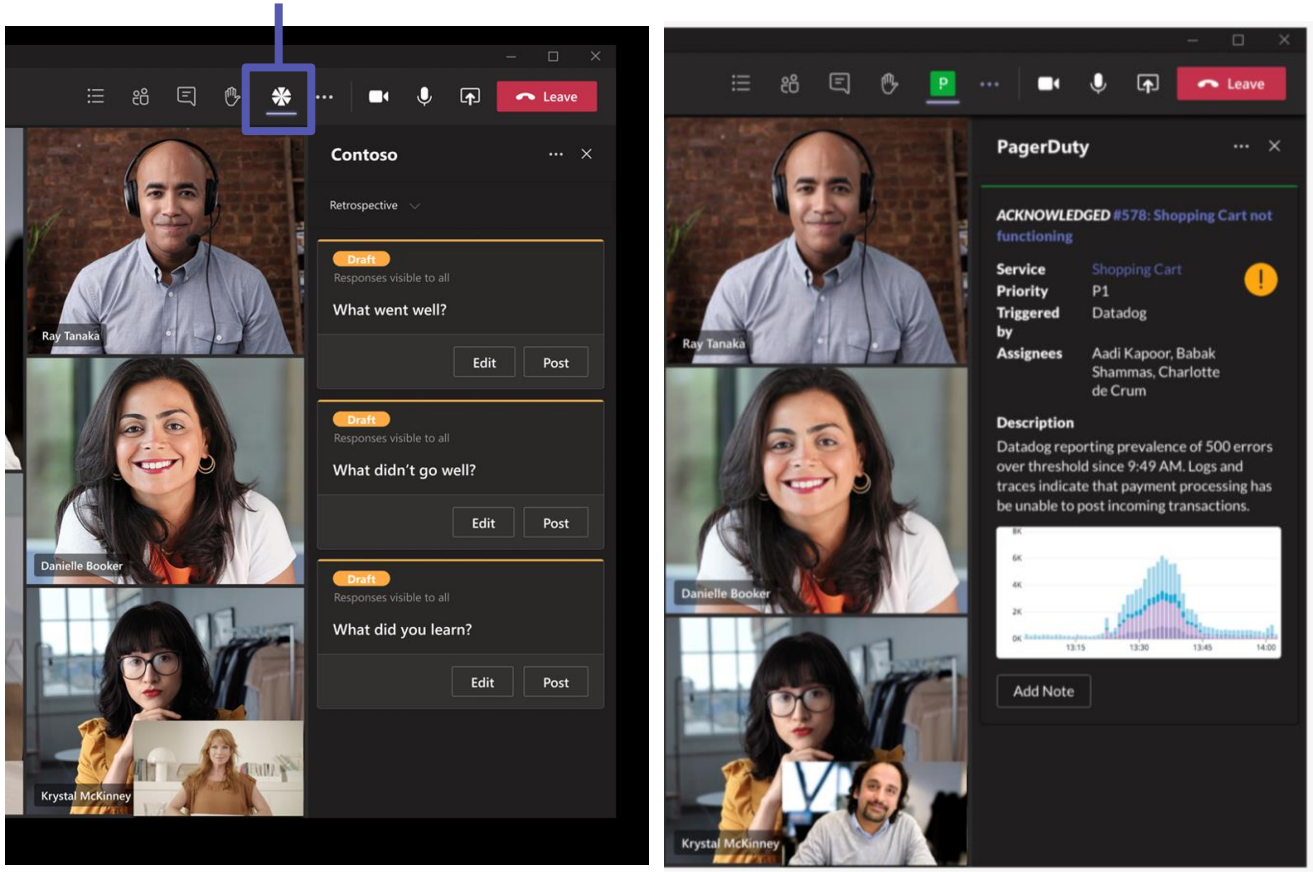
Side panel canvas within the meeting. 320px in width and utilises single sign-on to provide seamless access to interactive interfaces for participants and presenters.

Use case examples:

- Receive feedback from team members
- Fetch live data during sales meeting
- Virtual healthcare consultation
- View lesson plan during online classes

[Sample]

Company branded custom app experience



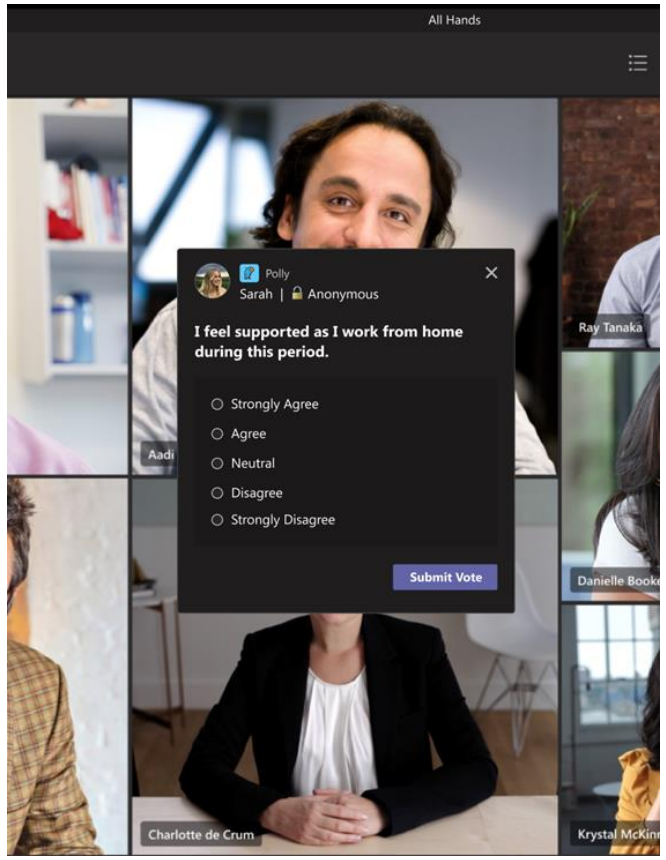
Capabilities of meeting apps

In-meeting dialog

Use the in-meeting dialog to show actionable popup content for meeting participants.

Use case examples:

- Vote on agenda items
- Gather responses from participants
- Test understand on question proposed
- Record attendance or agreement



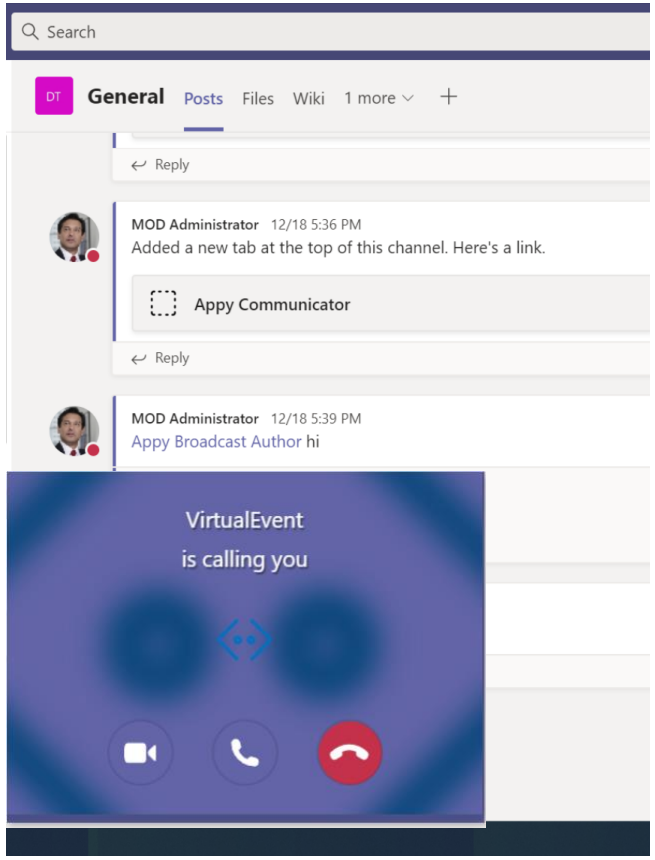
Capabilities of meeting apps

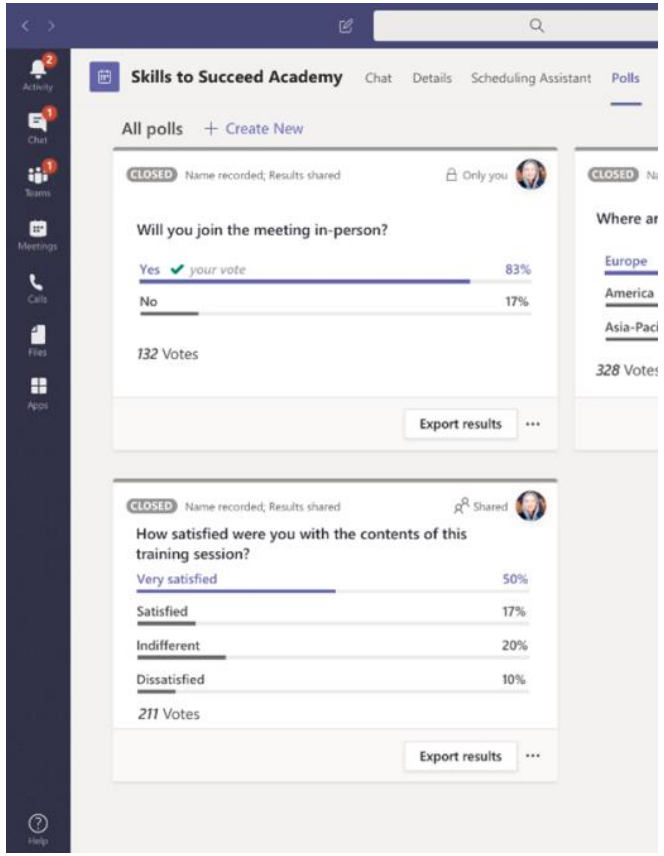
In-meeting chat bots & tabs

Chat bots within meetings can automate tasks and complete actions when @ mentioned.
Tabs allow for a pre- and post-meeting app experience.

Use case examples:

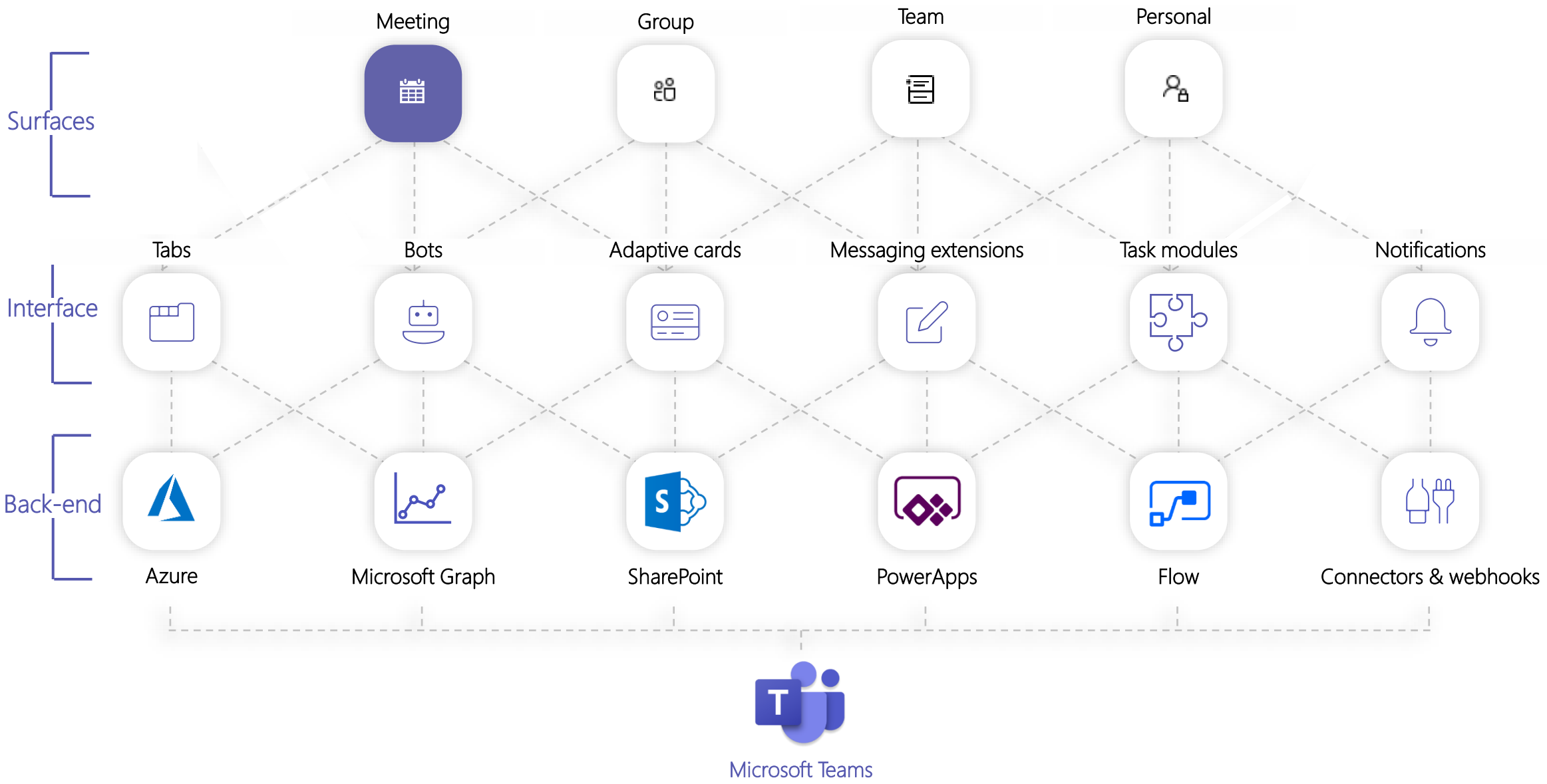
- Bot to notify participants of action or update
- Set question prior to meeting
- Review responses from meeting
- Select the work items to be discussed.





Sample

Bring your existing solution to life



Banking & Financial Services – Lead Management

Scenario Overview

- Daniela is a relationship manager (RM) at Contoso Banking. She is part of a team that covers personal, home and car loan products for customers
- Daniela gets a lead assigned to her, Aadi Kapoor, as a potential customer opportunity for home loan and related products
- Daniela acts on the lead and contacts Aadi via an e-mail and after discussing initial details, Aadi Kapoor requests for a detailed call to go over loan options, interest rates and procedures
- Daniela schedules a Teams meeting with Aadi and walks him through various loan options available at Contoso banking with help of brochures and other talk track assets.
- She also customizes her talk track to Aadi's needs and wants by looking at insights about his profile from CRM and proposes discounts, offers available for Aadi.
- Finally, Daniela shares policy documents, loan brochures and applications over e-mail to Aadi at the end of the call.

Personas

Daniela Mandera,
Relationship Manager

Aadi Kapoor,
Bank's customer

How can app in meeting add value?

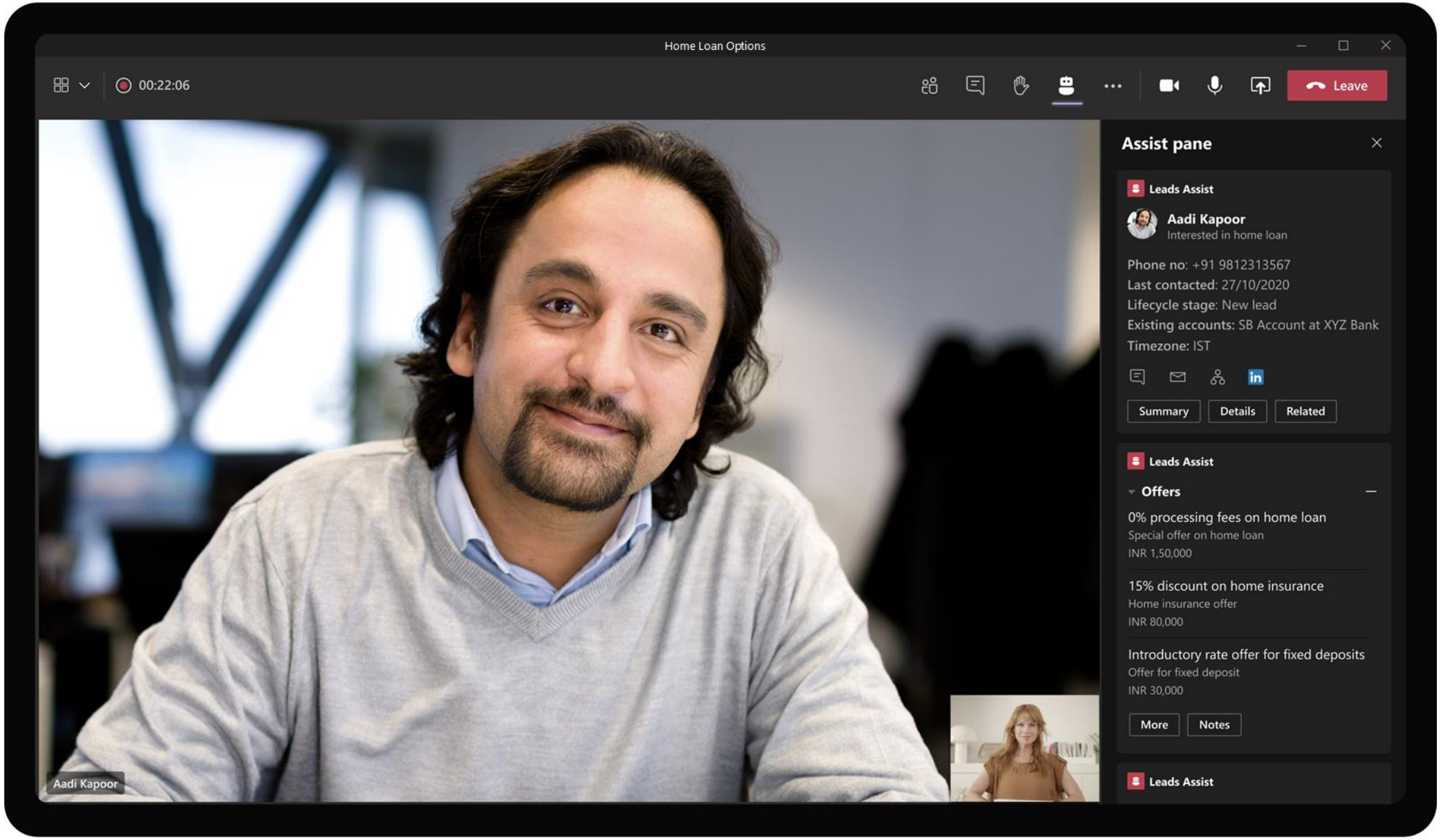
- During a call with a customer, agents typically perform a lot of look up operations – be it customer information, product information or specific deal details. It is ideal to have all these frequently accessed resources in the meeting experience to reduce context switches
- It is imperative that customer actions, follow-ups happen quickly without any friction. Ability to trigger a signing of application form, sharing relevant documents at a click can save customer attrition and improve conversions

Possible Integrations

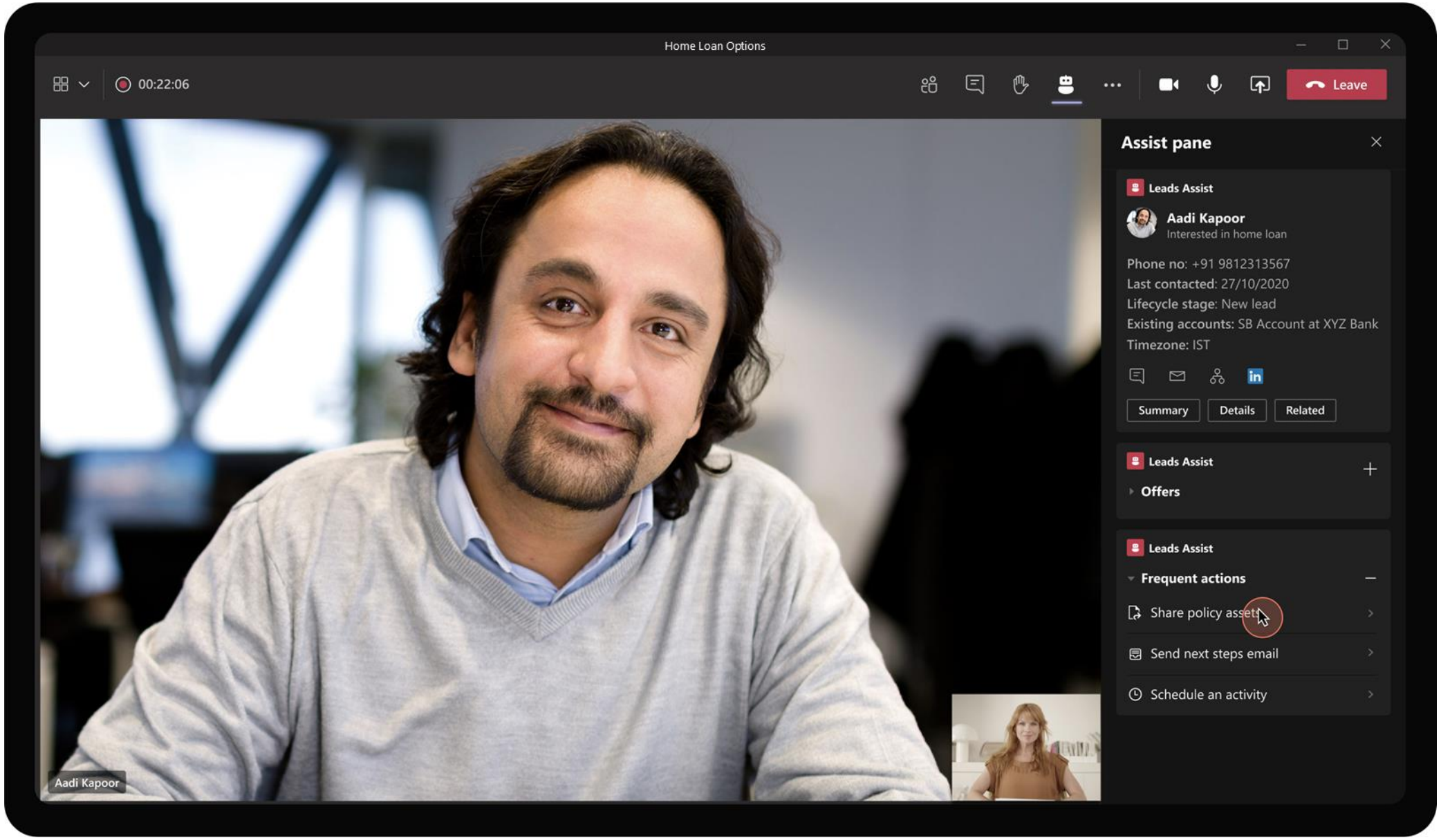
CRM

Signing Tools

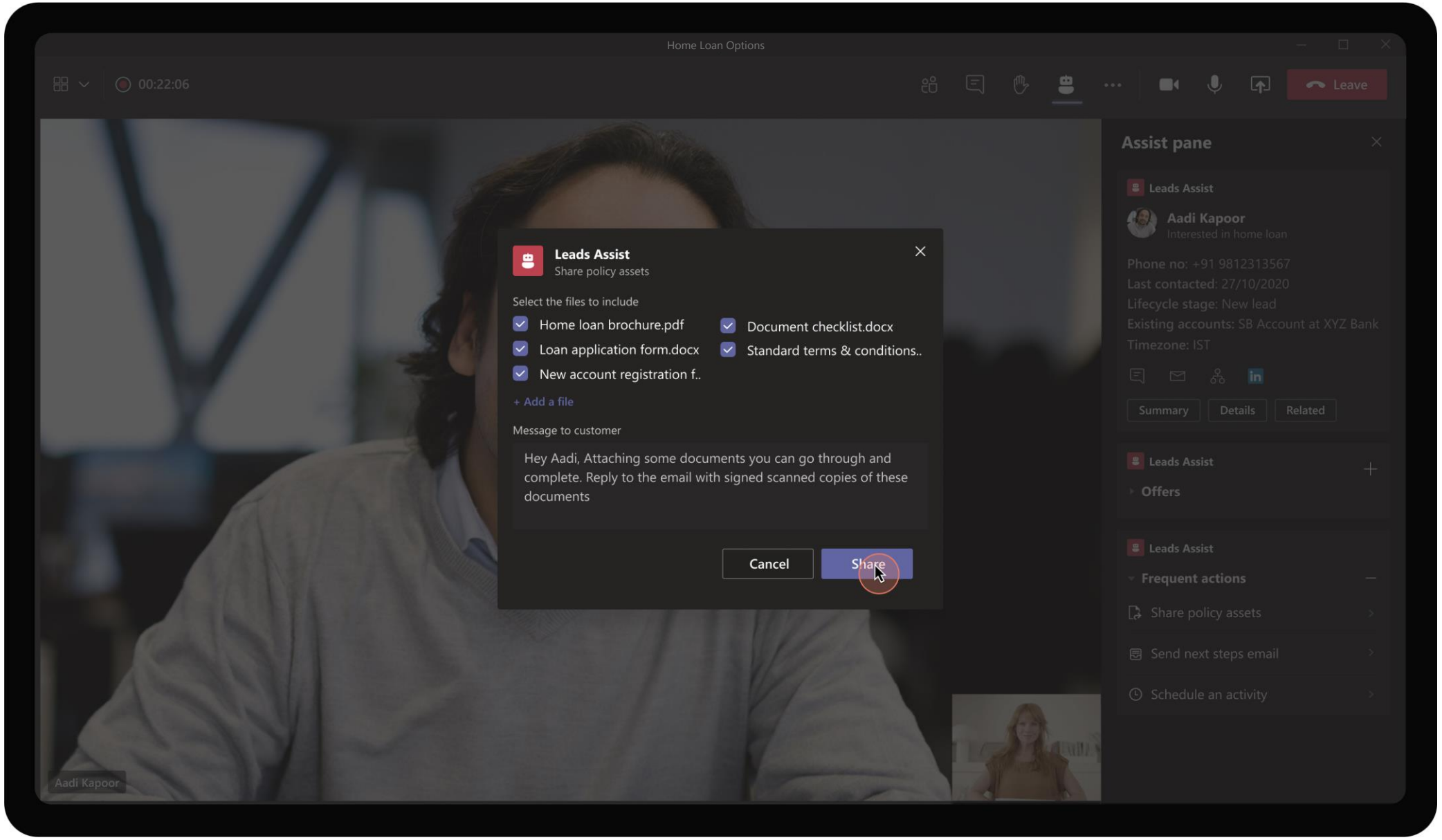
Knowledge base
+ Asset Library



As Daniela joins the call with the lead, the app shows basic information about the customer on the meeting side panel. It also brings up customized offers, discounts and talking points available for Aadi Kapoor



Daniela can also use the side panel to perform frequent actions such as sharing of documents, e-mails to the lead while on the call. Daniela chooses to share an asset related to the home loan policy under discussion.



The app prompts a dialog box for Daniela to view and choose the files to be shared with the lead. Optionally, Daniela can also add a note along with the message. On clicking ‘Share’ these files are sent as attachments in e-mail to Aadi Kapoor.

Cross-Industry – HR Recruiting

Scenario Overview

- Daniela Mandera is looking to hire for Software Engineer role and is about to interview candidate – Danielle Booker for the position
- As Danielle joins the Teams meeting for the interview, Daniela uses the meeting side panel to go through her profile, the job description skills and asks pertinent questions around the candidate's profile
- Daniela also takes notes as the candidate continues to speak, jotting down her strengths and weaknesses, areas to further probe and get additional information
- The interviewer recognizes that it's the 3rd round of interview for the candidate and looks up feedback from previous interview rounds to fine tune questions from identified weak areas in previous rounds
- As the meeting ends, Daniela records the final feedback in post-meeting tab and shares the hire / no-hire decision to the HR committee.

Personas

Daniela Mandera,
Interviewer

Danielle Booker,
Interview Candidate

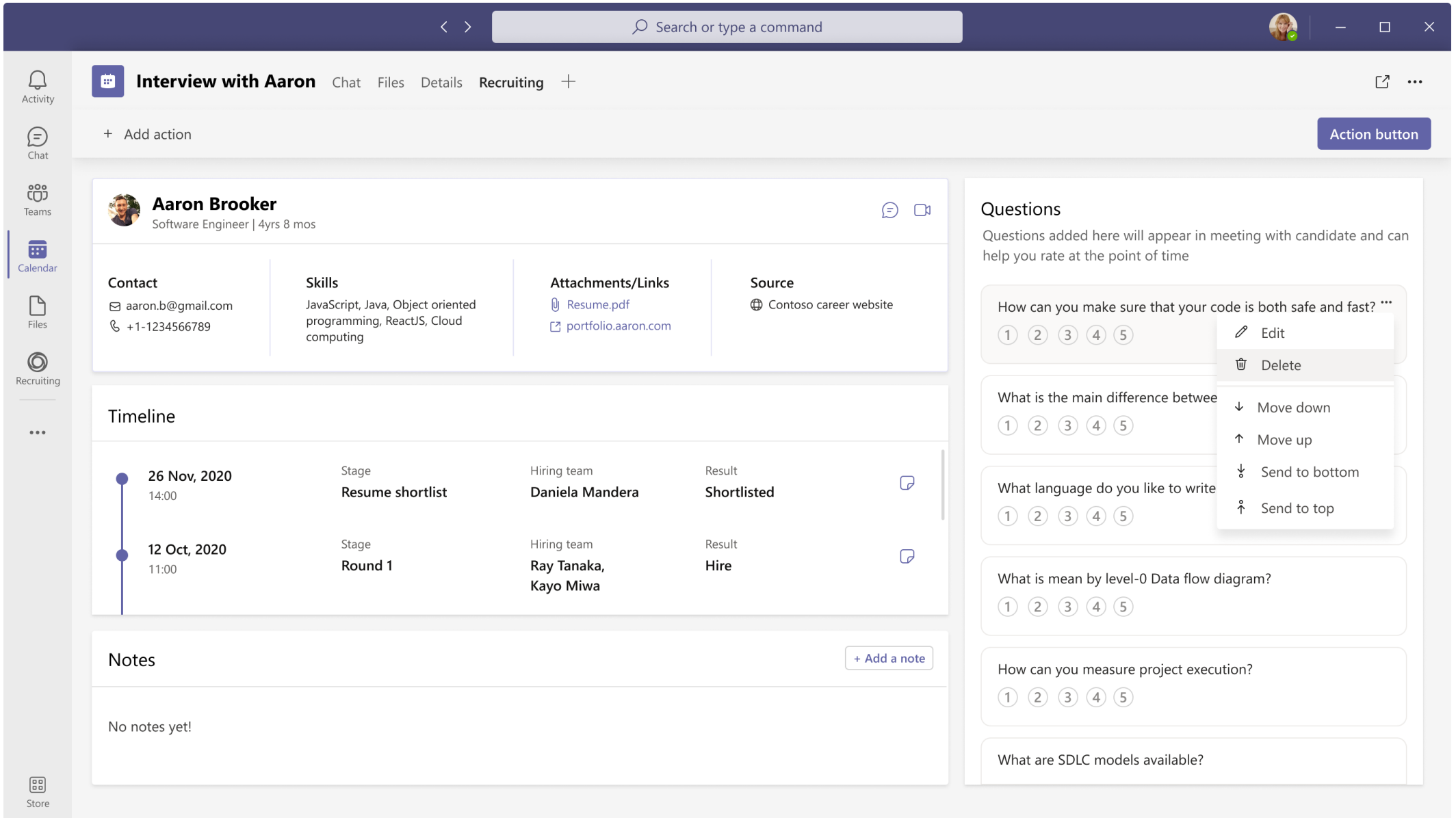
How can app in meeting add value?

- During interviews, the interviewer typically needs to be on video call to ensure face time with the candidate. The interviewer also needs to take notes, browse through candidate profile for interest areas. It is ideal that in-meeting experience offers this without taking the interviewer away from interview screen
- Surfacing interview feedbacks shared across different rounds is valuable during the interview as it helps the interviewer fine tune their questions and avoid repeating similar questions
- Meeting app can also help in surfacing questions from question bank with feedback sections near the questions to rate candidate's response

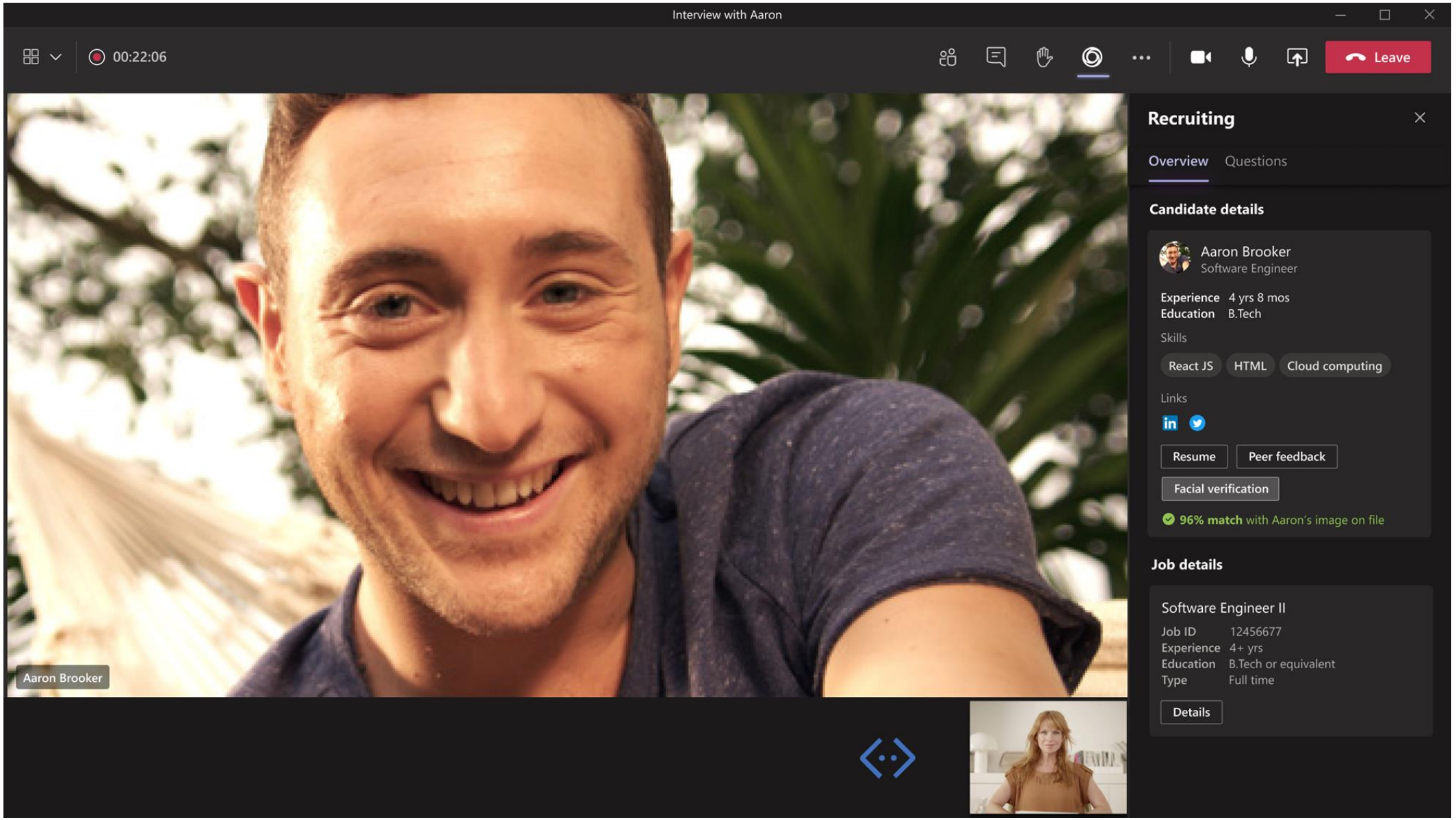
Possible Integrations

Candidate DB

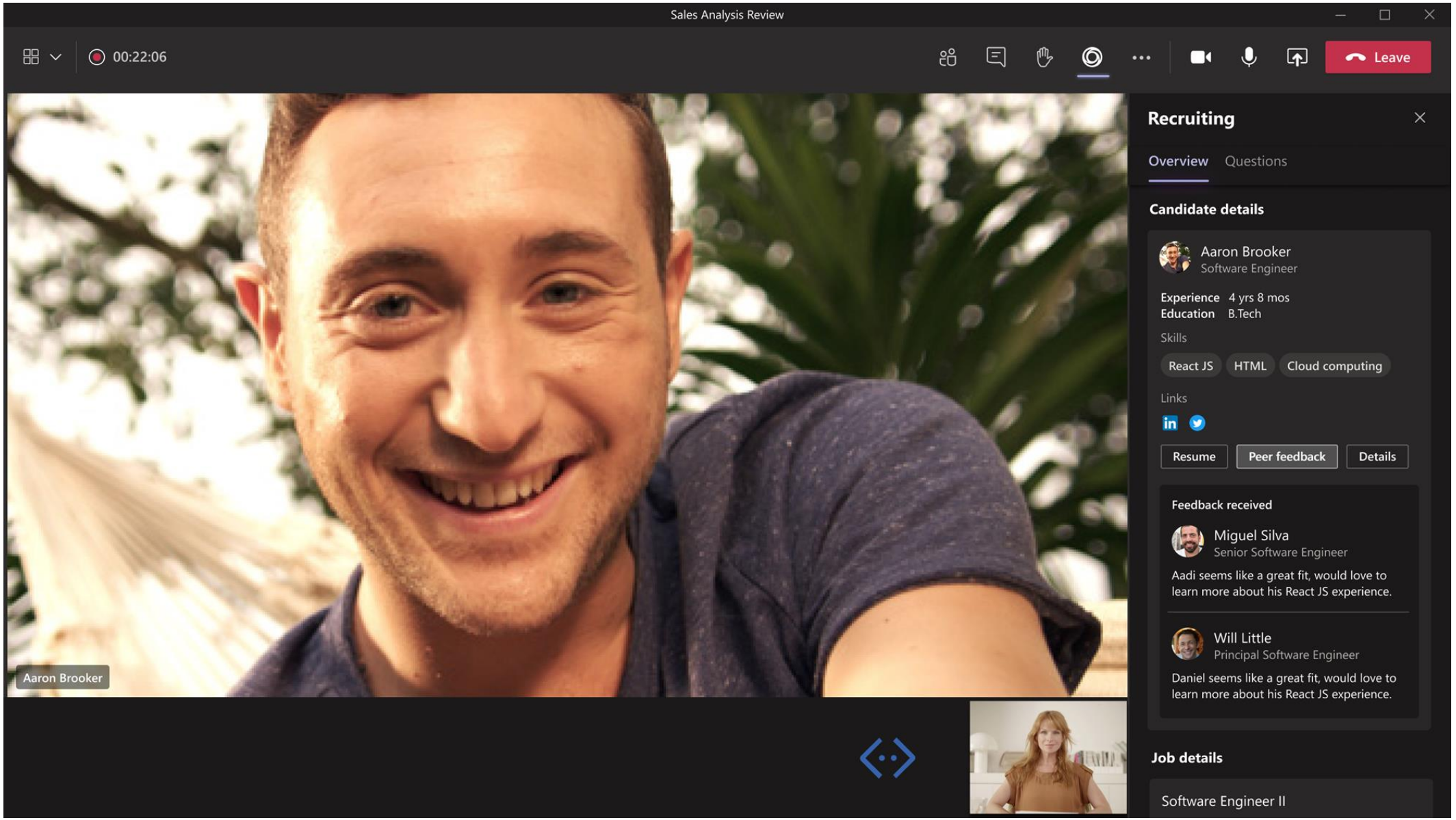
Question Bank



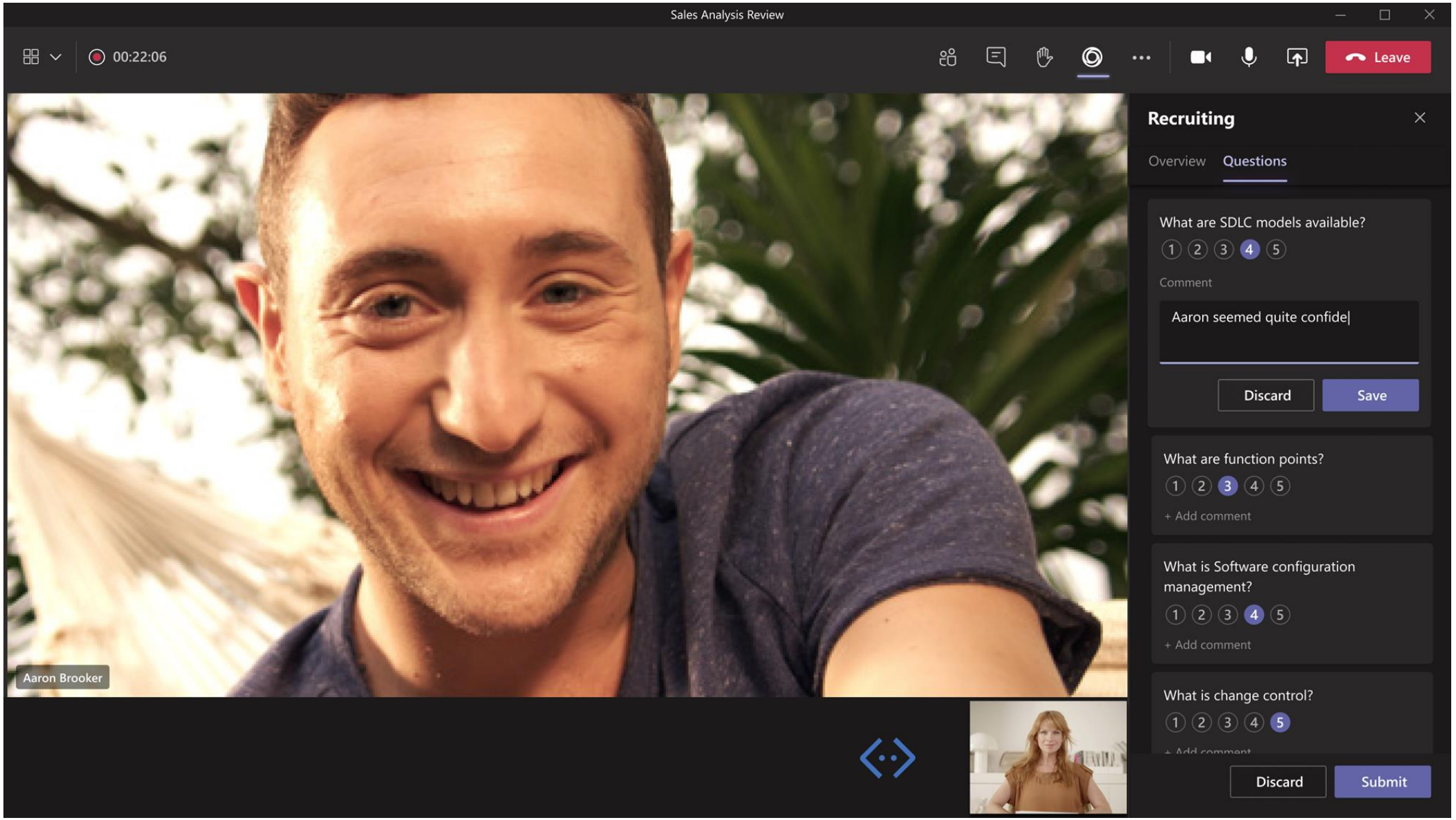
As a preparation before the interview, interviewer can view the candidate details, prior rounds notes and add / edit questions to ask the candidates during the interview



During the interview, the interviewer can view the candidate's profile, basic information, JD details on the side panel. In addition, a media bot also joins the meeting to perform a facial verification of the candidate showing the results on the side panel.



Interviewer can also view prior round feedback and fine tune their questions based on the feedback. The side panel view is personalized to the interviewer and is not visible to the candidate



As the candidate answers questions during the interview, the interviewer can take notes and evaluate the candidate for each question on the side panel. This helps interviewer provide fresh feedback and reduces efforts, fastens feedback collection.

Sales Function – Car Loan Sales

Scenario Overview

- Daniela is a relationship manager (RM) at Contoso Banking. She is part of a team that covers personal, home and car loan products for customers
- Daniela gets an incoming chat request from a customer on Contoso's website requesting details about a car loan
- The customer chats with Daniela and requests for a call to get into the details of the loan, interest rates and procedures
- Daniela schedules a Teams meeting with Aadi and walks her through the loan options available for various types of car – mid range, luxury cars using the talk track on side panel
- She also customizes her talk track to customer's needs and wants by looking at insights about her profile from CRM and proposes discounts, offers available for Megan.
- Any follow-up opportunity with customer is carefully noted by Daniela to be stored in CRM

Personas

Daniela Mandera,
Relationship Manager

Megan Bowen,
Bank's customer

Possible Integrations

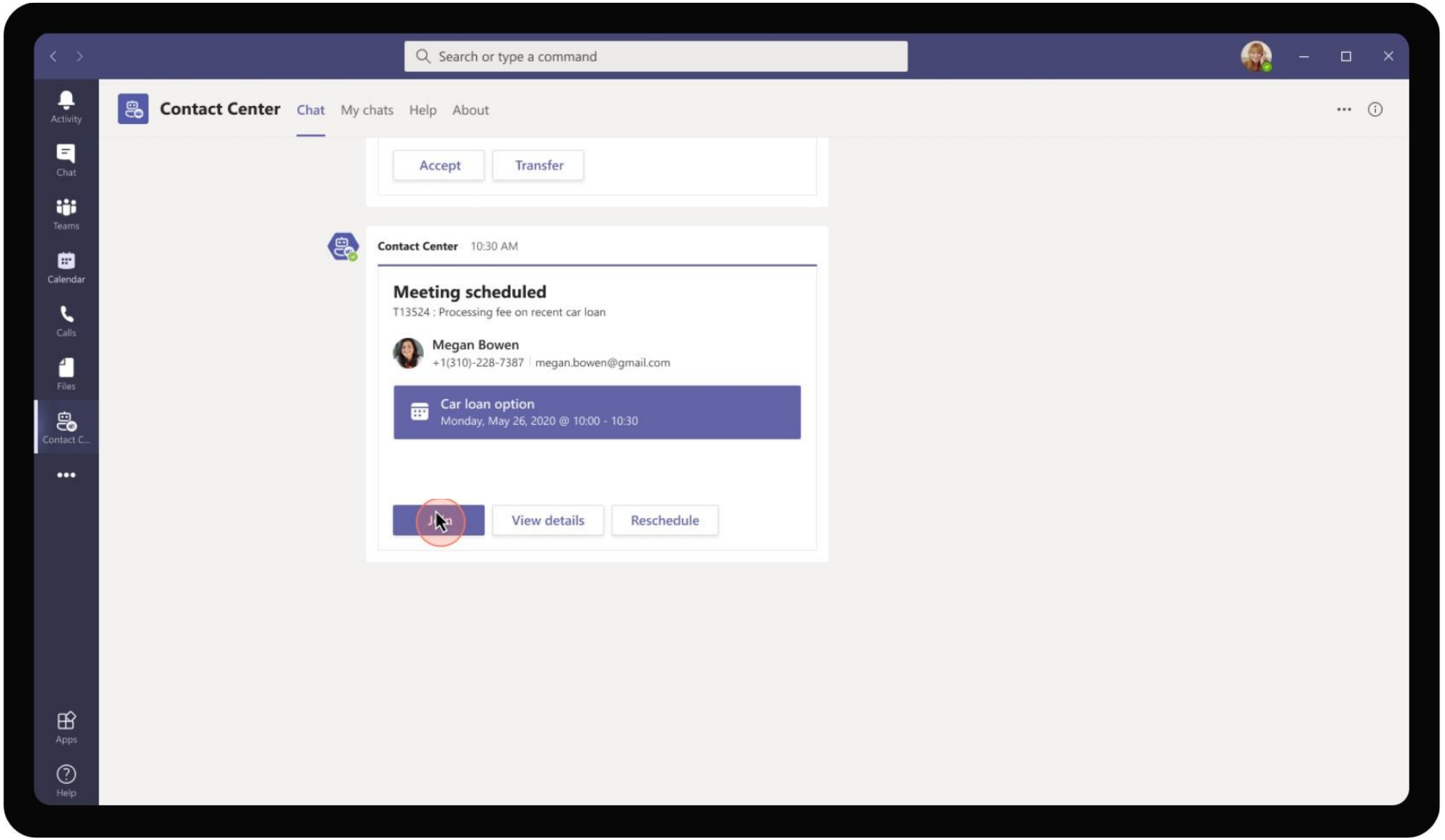
CRM

Signing Tools

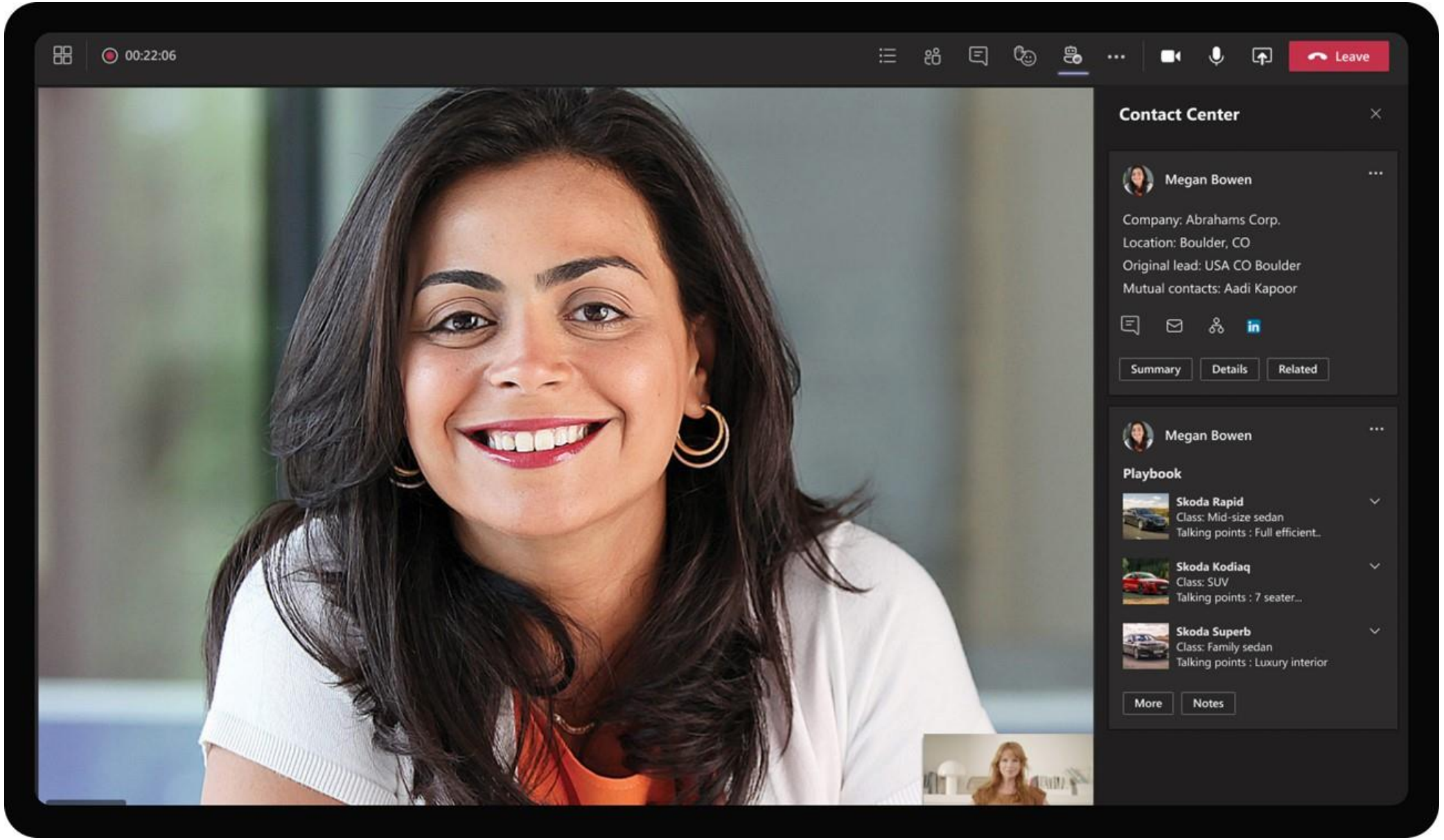
Knowledge base
+ Asset Library

How can app in meeting add value?

- During a call with a customer, agents typically perform a lot of look up operations – be it customer information, product information or specific deal details. It is ideal to have all these frequently accessed resources in the meeting experience to reduce context switches
- It is imperative that customer actions, follow-ups happen quickly without any friction. Ability to trigger a signing of application form, sharing relevant documents at a click can save customer attrition and improve conversions



The app allows Daniela to schedule a meeting with the customer directly. With the proper triaging of type of loan request from the customer, the app can intelligently suggest relevant assets, talk track for Daniela to review before customer call



During the call, the app pulls up information about the customer from CRM database. As the app is also integrated with knowledge base,it can surface relevant talk track for the customer on the side panel. In addition, it allows Daniela to search through knowledge base and capture notes from the call

Education – Academics Assistant

Scenario Overview

- Daniel is a student at Contoso University. He has a packed schedule with multiple electives in his second semester. One of Daniel's pain points is being on top of course content, action items from classes
- Daniel attends his classes via Teams meetings. During the class, he accesses the side panel to take notes with image captures of presentations.
- Like Daniel, rest of the class of 80 members also take notes in their personal space on meeting side panel.
- Any homework items, submissions, exam dates that the professor announces during the class is easily noted down by Daniel as a To Do item.
- The app allows students to share notes taken by one another in a common OneNote pinned in channel for the respective class

Personas

Daniel Tao,
University Student

How can app in meeting add value?

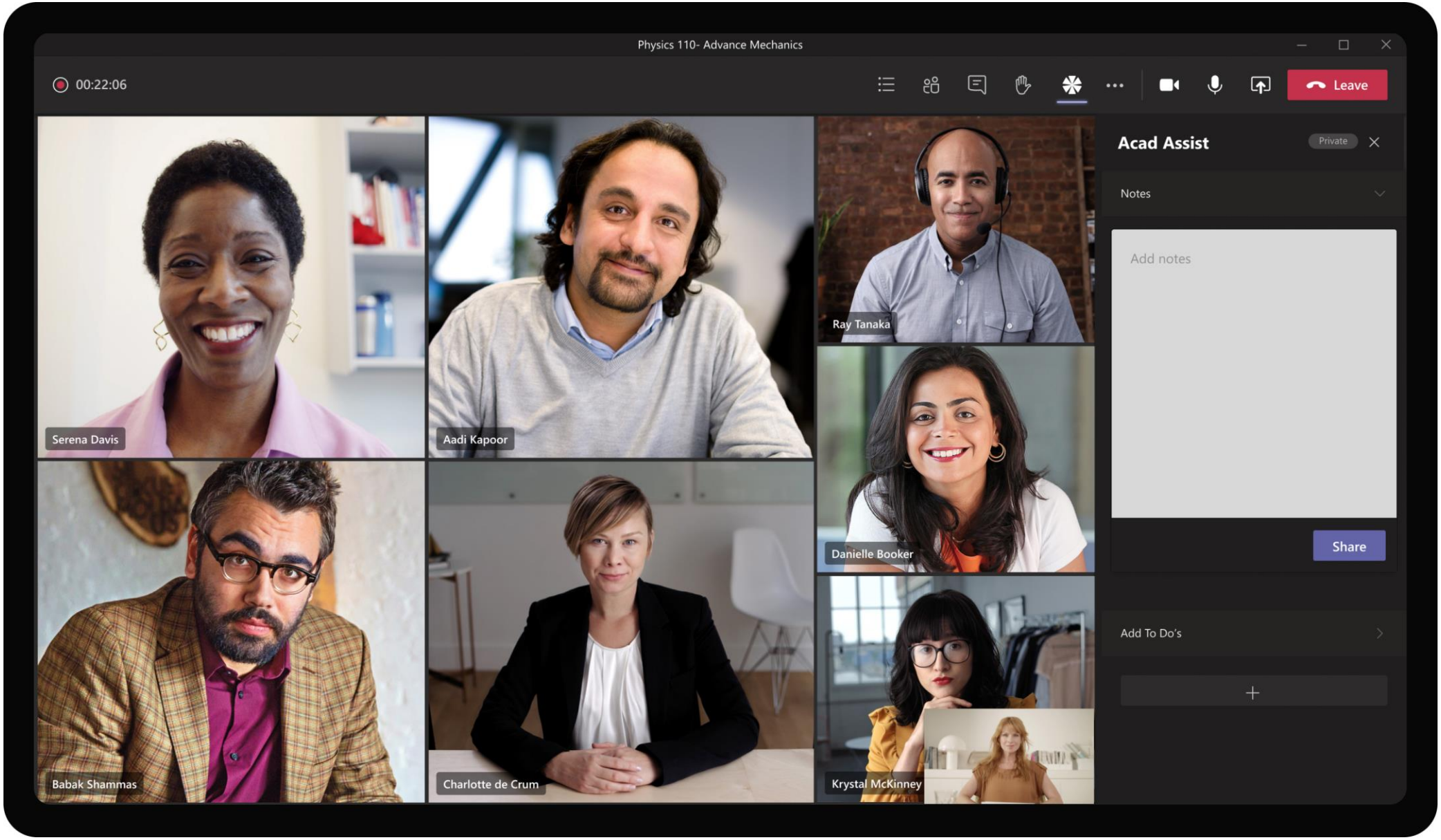
- All students take notes during a class but collaboration and sharing of notes happens in an unstructured ad hoc manner. Allowing capturing and sharing of notes as part of classroom (in meeting) experience encourages better collaboration and productivity
- Capturing action items, To Do lists should be as friction-less as possible in order to make a student's life easier. As an in-meeting experience, students can continue to focus on classroom discussions while jotting down To Do items.

Possible Integrations

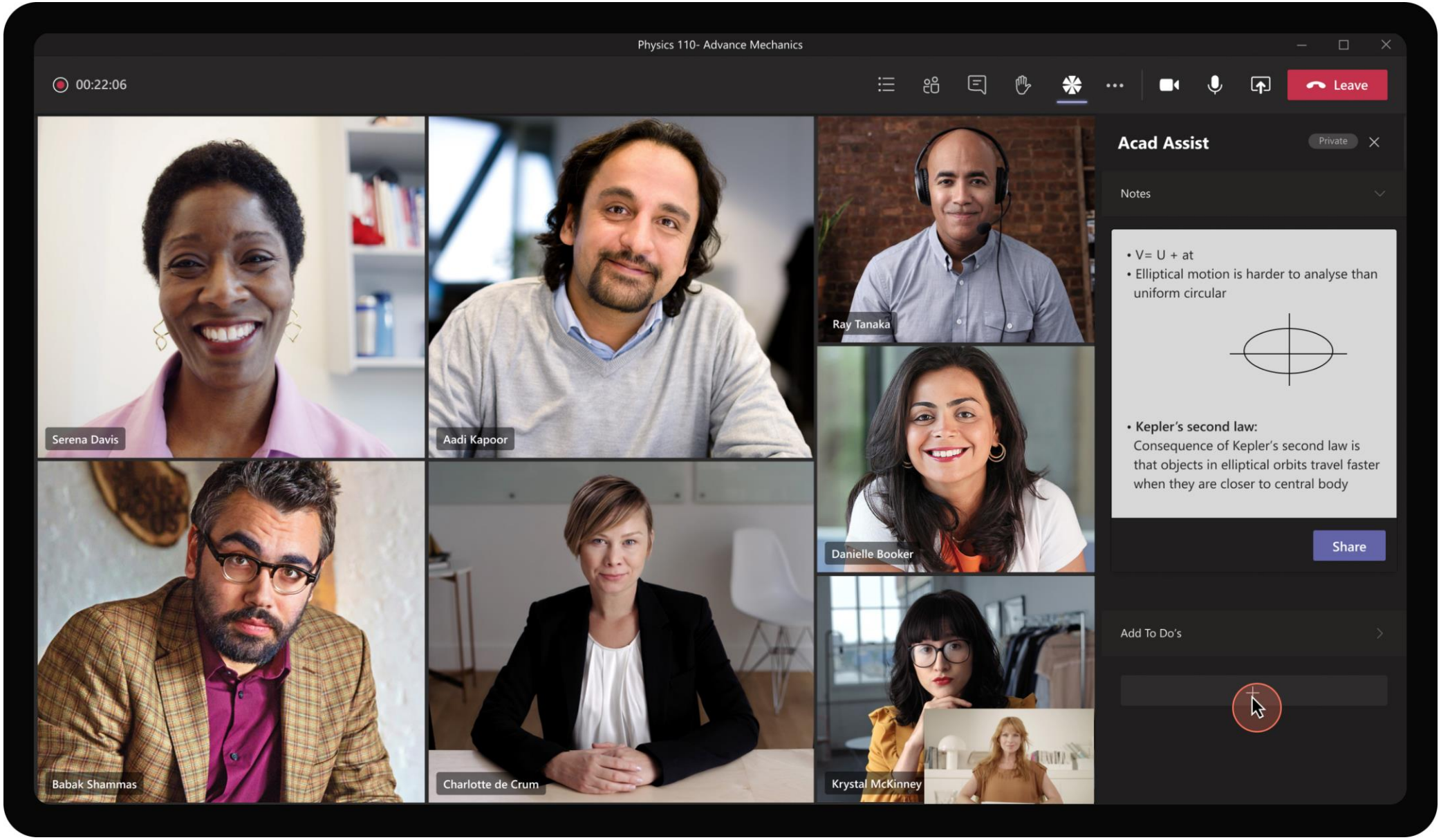
To Do

Planner

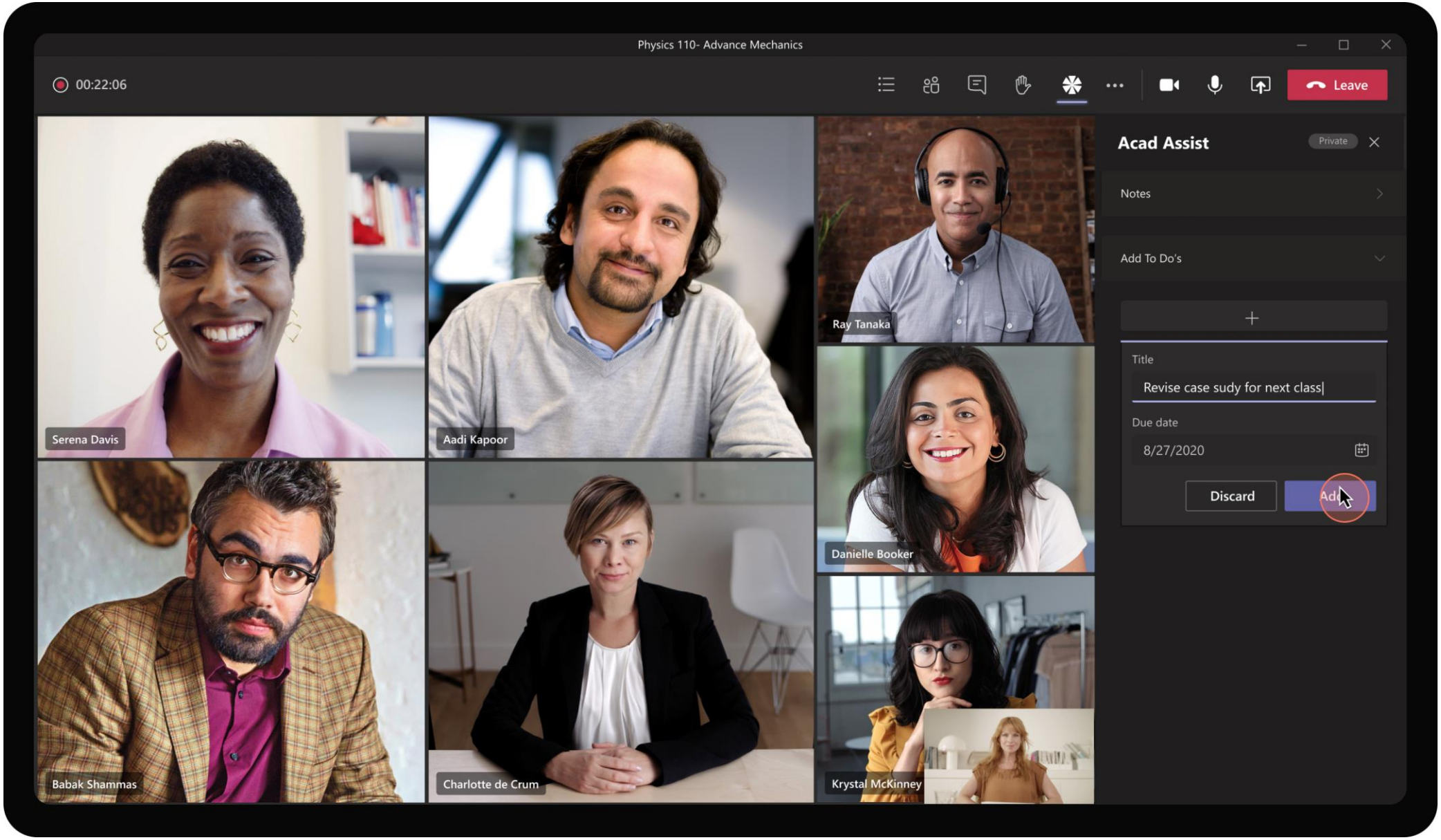
OneNote



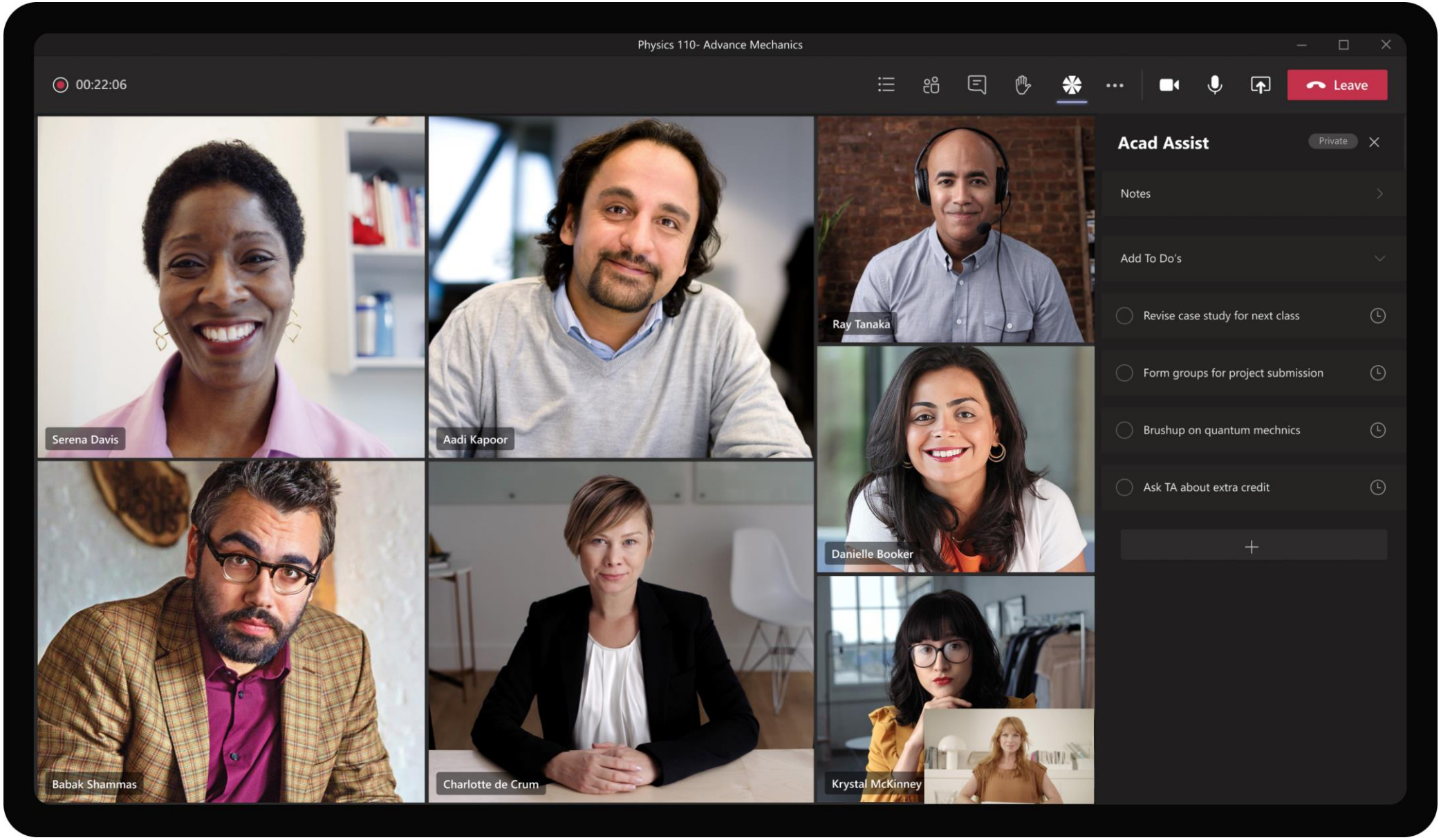
App also provides additional surfaces on the meeting side panel for students to take notes during the class. Daniel can take notes in the notes section on the side panel without having to switch to another screen.



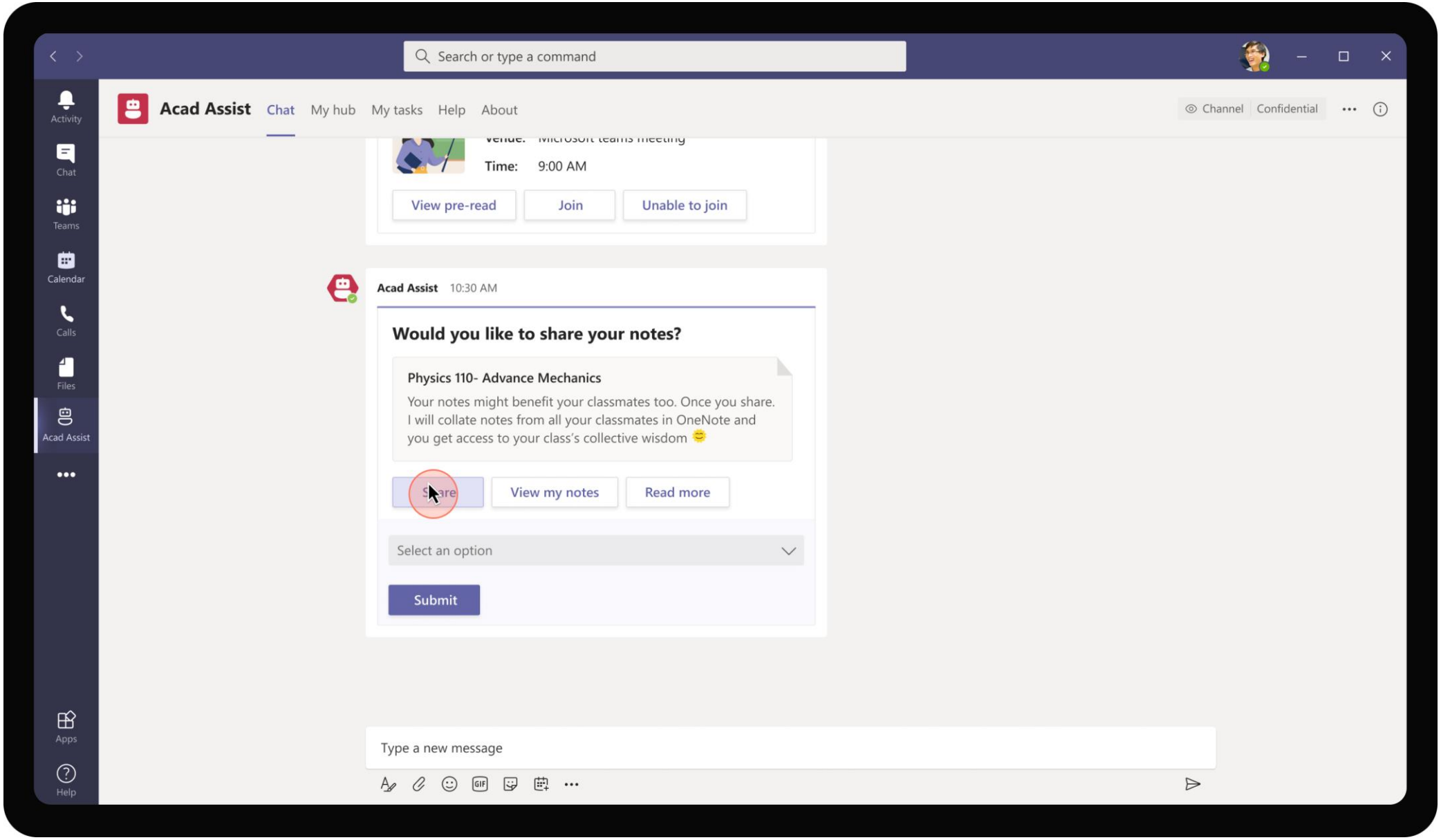
As the professor shares content on the screen, uses diagrams to deliver lecture, the notes section can be used to copy the concepts presented and take notes with a mixture of picture and text.



As the professor highlights certain follow-up items, provides mini activities for the class, students can make a To Do list on the app using the side panel. Daniel uses the To Do list to make reminders for a case study read up for next week.



To Do list created in the app utilize Tasks in background and are automatically synced to Planner and To Do lists in Windows. Daniel will be able to track and mark them complete across any of these surfaces.



Notes captured by Daniel are auto saved in personal OneNote. After the lecture is complete, the app prompts Daniel to share his notes with his entire class and in return get everyone's notes in a single place for the lecture.

Education – Quiz Master

Scenario Overview

- Daniela is a science professor who conducts engaging classroom discussions that invites students to speak and participate in healthy discourse
- Due to pandemic and remote learning guidelines, she has adopted delivering course content over Teams meeting.
- As a way of keeping the engagement alive, she performs surprise quizzes for brownie points, interesting prizes. This promotes healthy competition among students
- During a class session, Daniela conducts a quiz from her set of questions in the form of MCQ. As Daniela publishes each question, students have 30 seconds to answer before the question gets locked
- Students get to see real time their position in the class and how well they are performing. Daniela also gets a view of top performing students that's automatically tracked in student database
- In addition to promoting healthy competition, students learn right answers instantaneously.

Personas

Daniela Mandera,
Science Professor

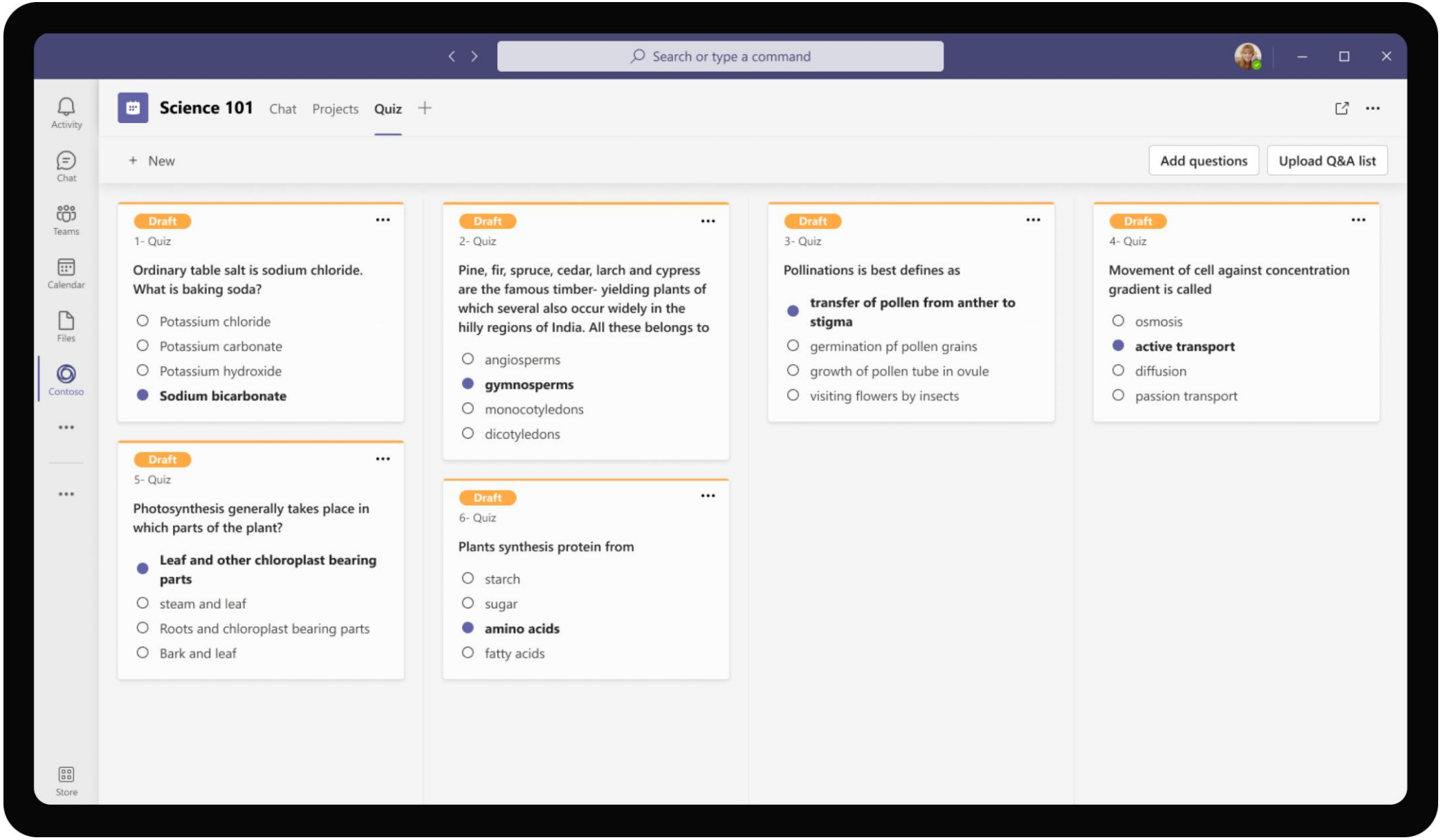
How can app in meeting add value?

- Q&As during a classroom session is a natural way of engaging with students for teachers. To keep the spirit alive, these ad hoc quizzing sessions can be conducted during classes conducted via Teams meeting as well. Having a real time view of other students and interacting with teacher directly breaks the virtual walls of a remote classroom
- Any other way of implementing the quizzing scenario during a class would take students out of meeting context which may cause confusions, disconnects, unnecessary context switching in viewing the professor and viewing the question within a time frame. Meeting apps fit perfectly well for this use case

Possible Integrations

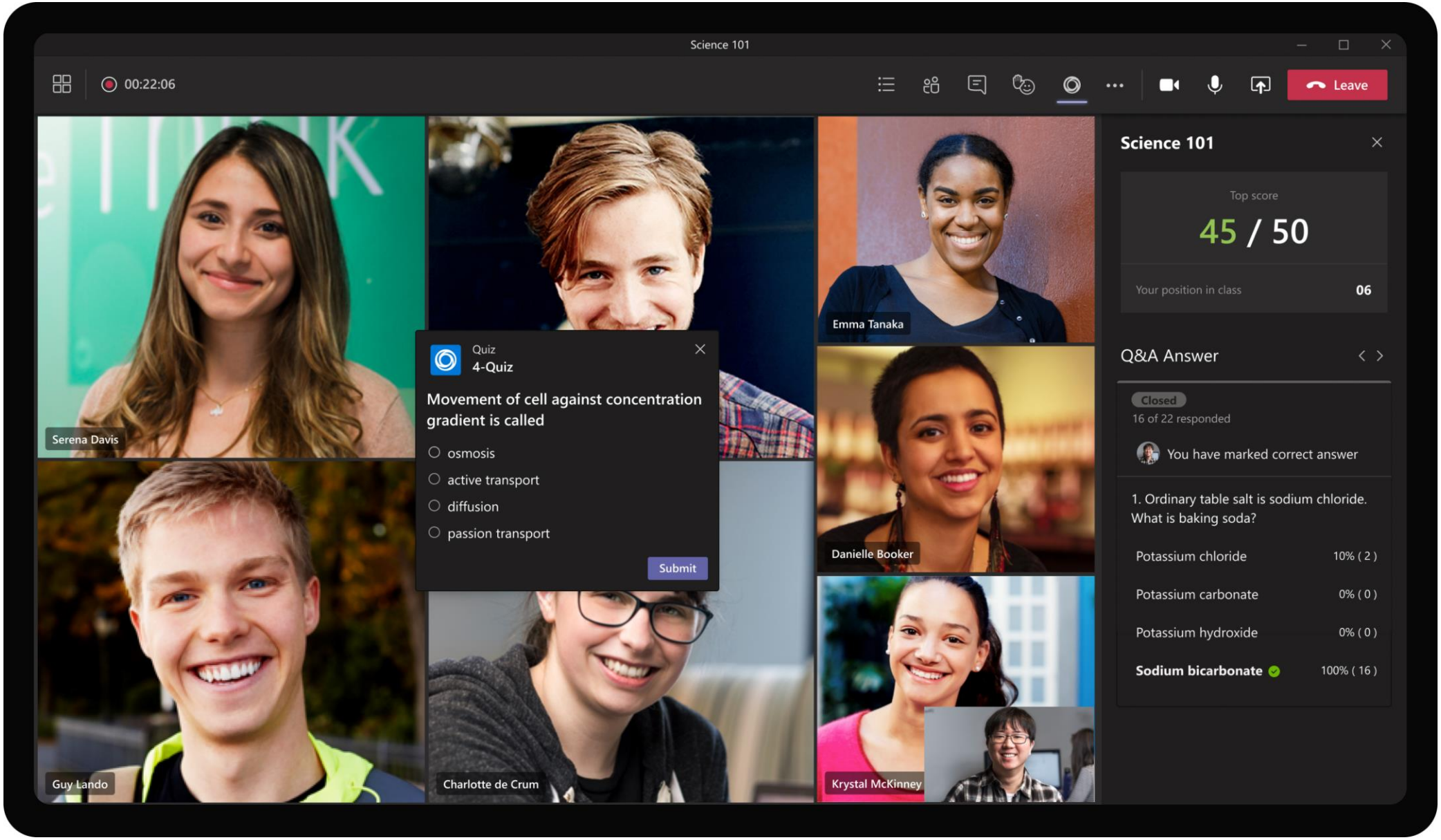
Student Marks DB

Question Bank



Daniela can prepare the questions manually by adding it in pre-meeting tab before the meeting. She also has options to upload an excel file, csv file containing the questions in right format.

During the class session, Daniela is able to view upcoming questions to ask her students in the top section of side panel. The bottom section shows a live leaderboard view showing top performing students so far.



For students, the view would show their score and position in class. This encourages a healthy competition. In addition, as a learning experience, the app also instantly shows the right answers for previous questions.

Healthcare – Virtual Doctor Visit

Scenario Overview

- Daniela is a general physician and performs patient visits, consults remotely to minimize exposure and to reach remote patients
- Danielle Booker is a patient who has requested consult on fever and common cold symptoms she has been feeling for a couple of days. The hospital system sets up a meeting connecting the doctor to patient
- Daniela gets on a Teams meeting with Ms. Booker and she gets a good view of her information, vitals, medication and illness history, essentially all points of information that will aid in the diagnosis
- She proceeds to listen to Ms. Booker over the call regarding her symptoms. Meanwhile, Daniela also takes a look at her recent lab reports for any discrepancies
- As Daniela arrives at a diagnosis, she prescribes medicines within the meeting after hearing about any allergies that Ms. Booker might have. The knowledge base integrated also provides useful notes around side-effects for medications that Daniela can quickly refer and clarify for Ms. Booker
- The prescription gets mailed to Ms.Booker over email as a signed PDF in hospital letterpad template. Post-meeting, Daniela writes follow-up notes, any other tests required

Personas

Daniela Mandera,
General Physician

Possible Integrations

E-Prescriptions App Template

Electronic Health Records

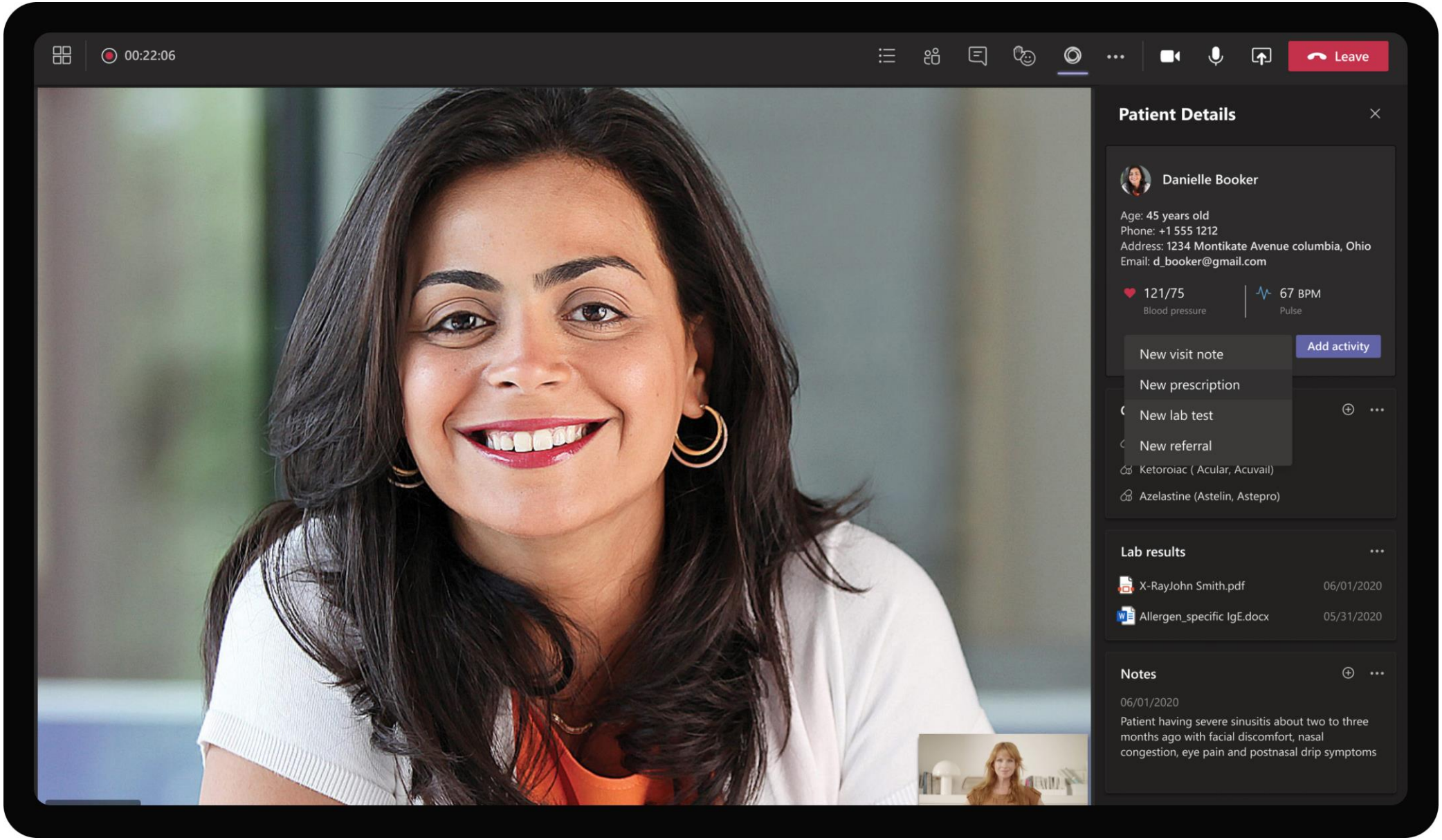
LOB Patient Tracking System

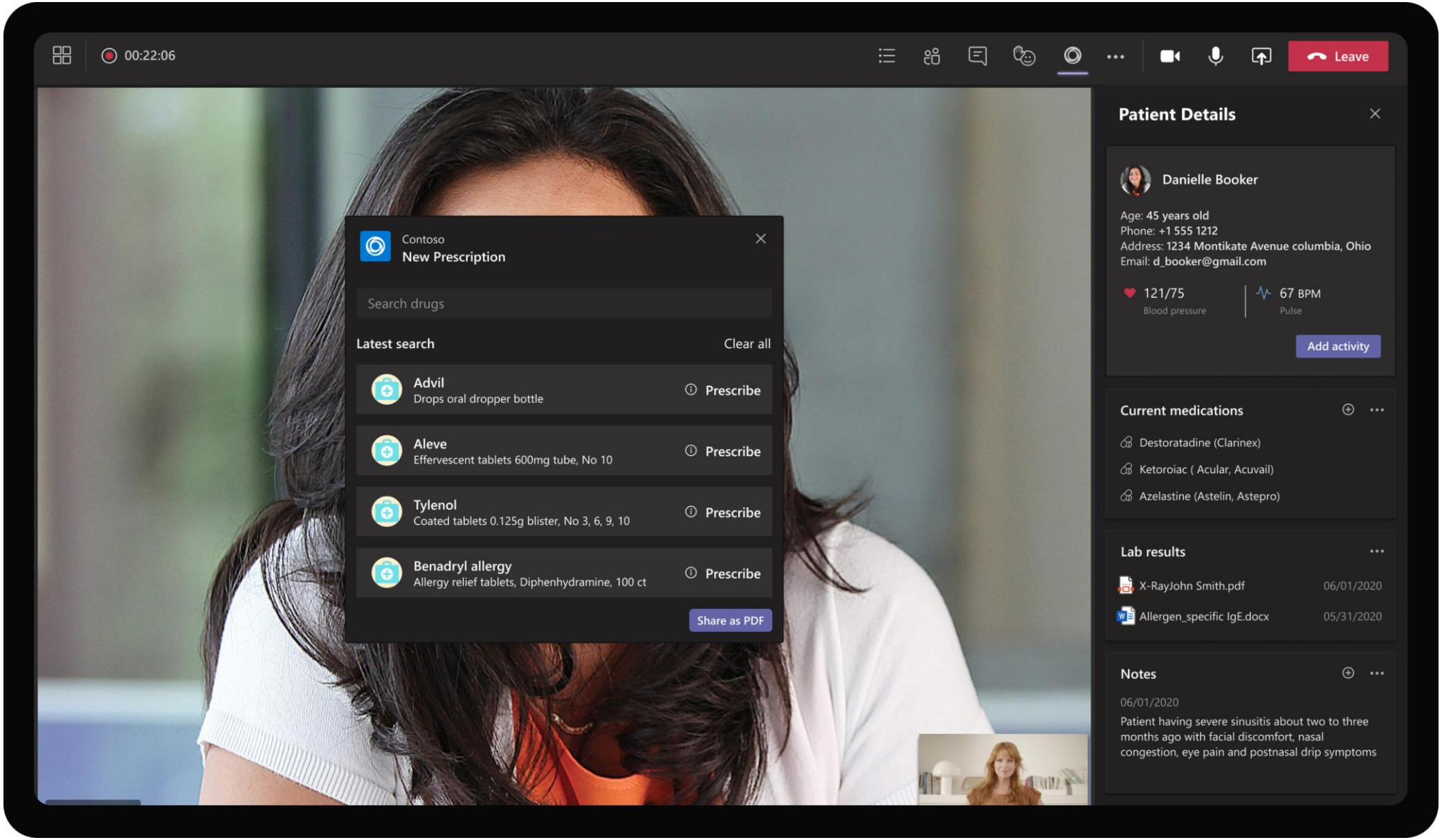
Medicine KB

How can app in meeting add value?

- **Improved Patient Care:** Ability to search for patient history, previous interactions, lab reports is vital for doctor to come with an accurate and quick diagnosis. Meeting apps are crucial in bringing this information from disparate systems in one central place allowing doctor to worry less about process and system and focus on patient care
- Doctors also get to access the latest information on diseases, symptoms, medicines, side effects from the knowledge base allowing them to provide informed and high-quality patient care

Healthcare – Virtual Doctor Visit

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Aleve
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Tylenol
Coated tablets 0.125g blister, No 3, 6, 9, 10
Prescribe
Benadryl allergy
Allergy relief tablets, Diphenhydramine, 100 ct
Prescribe
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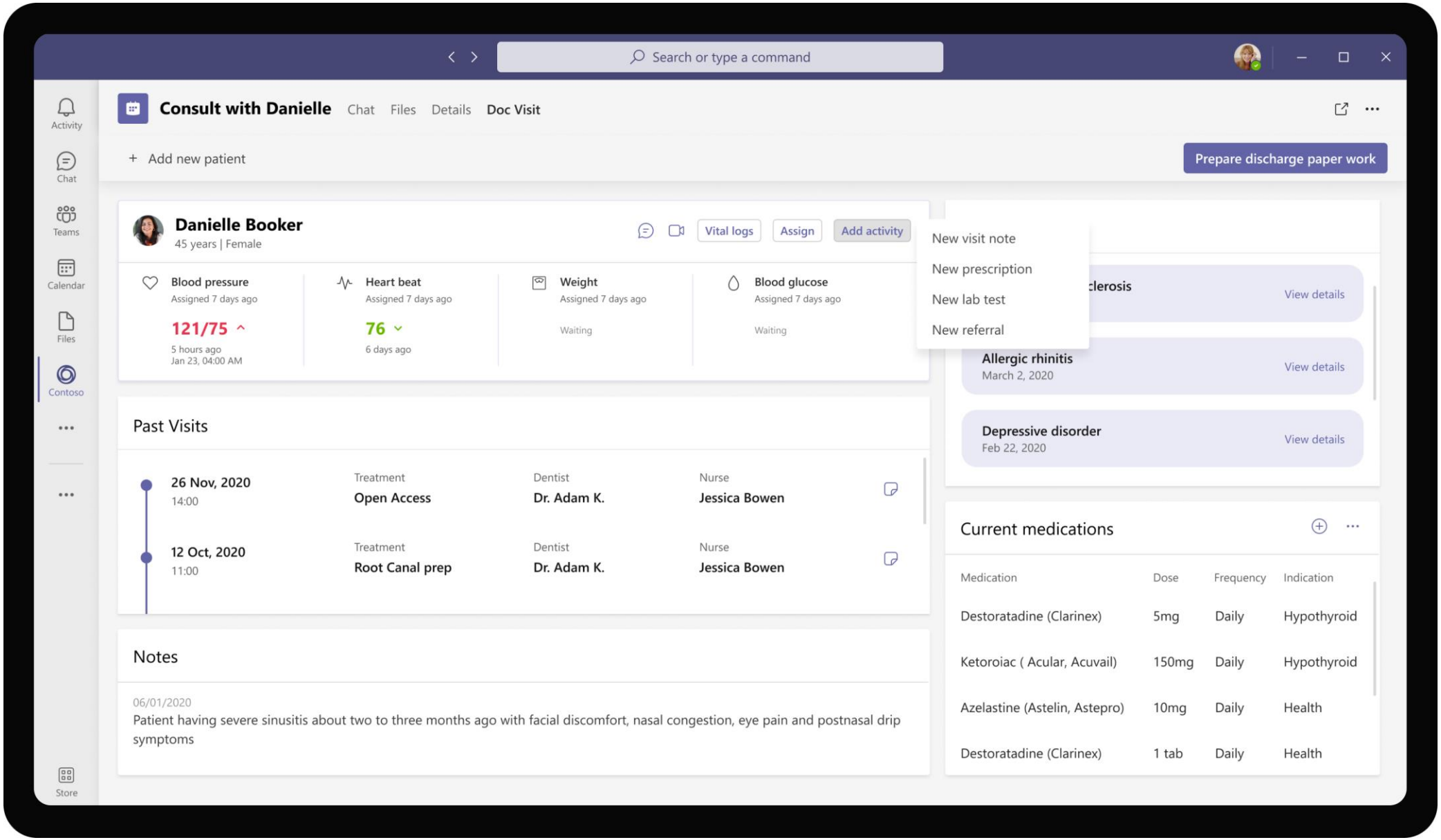
Email: d_booker@gmail.com
121/75
Blood pressure
67 BPM
Pulse
Add activity
Current medications
Destoratadine (Clarinex)
Ketoroiac (Acular, Acuvail)
Azelastine (Astelin, Astepro)
Lab results
X-RayJohn Smith.pdf
06/01/2020
Allergen_specific IgE.docx
05/31/2020
Notes
06/01/2020
Patient having severe sinusitis about two to three months ago with facial discomfort, nasal congestion, eye pain and postnasal drip symptoms


Search or type a command
Activity
Chat
Teams
Calendar
Files
Contoso
Store
Consult with Danielle
Chat
Files
Details
Doc Visit
Add new patient
Prepare discharge paper work
Danielle Booker
45 years | Female
Vital logs
Assign
Add activity
New visit note
New prescription
New lab test
New referral
Blood pressure
Assigned 7 days ago
121/75
5 hours ago
Jan 23, 04:00 AM
Heart beat
Assigned 7 days ago
76
6 days ago
Weight
Assigned 7 days ago
Waiting
Blood glucose
Assigned 7 days ago
Waiting
clerosis
View details
Allergic rhinitis
March 2, 2020
View details
Depressive disorder
Feb 22, 2020
View details
Past Visits
26 Nov, 2020
14:00
Treatment
Open Access
Dentist
Dr. Adam K.
Nurse
Jessica Bowen
12 Oct, 2020
11:00
Treatment
Root Canal prep
Dentist
Dr. Adam K.
Nurse
Jessica Bowen
Notes
06/01/2020
Patient having severe sinusitis about two to three months ago with facial discomfort, nasal congestion, eye pain and postnasal drip symptoms
Current medications
Medication
Dose
Frequency
Indication
Destoratadine (Clarinex)
5mg
Daily
Hypothyroid
Ketoroiac (Acular, Acuvail)
150mg
Daily
Hypothyroid
Azelastine (Astelin, Astepro)
10mg
Daily
Health
Destoratadine (Clarinex)
1 tab
Daily
Health

Retail

Scenario Overview

- Miguel is a store manager and is responsible for managing Contoso store in ABC Location right from inventory, merchandizing, operations, customer service and staff training
- Miguel performs weekly store audits and surprise audit checks from time to time to ensure that visual merchandizing in the store aligns per guidelines
- Miguel is working remote and would like to perform one such audit. He sets up a Teams meeting with a store associate at the store. The store associate uses the mobile camera to walk Miguel through store during the virtual audit session
- During the call, as Miguel provides instructions to cover each section of the store, the store associate follows and showcases over video call. Miguel completes audit checklist from within the meeting side panel
- If there are discrepancies, best practices followed, pictures need to be taken, Miguel may take a screenshot of the presented video, annotate on top of it and save it to the checklist response
- After entire audit is completed, the app automatically provides a summary view of audit results and allows Miguel to share it with rest of the management and for bookkeeping.

Personas

Miguel Silva,
Store Manager

How can app in meeting add value?

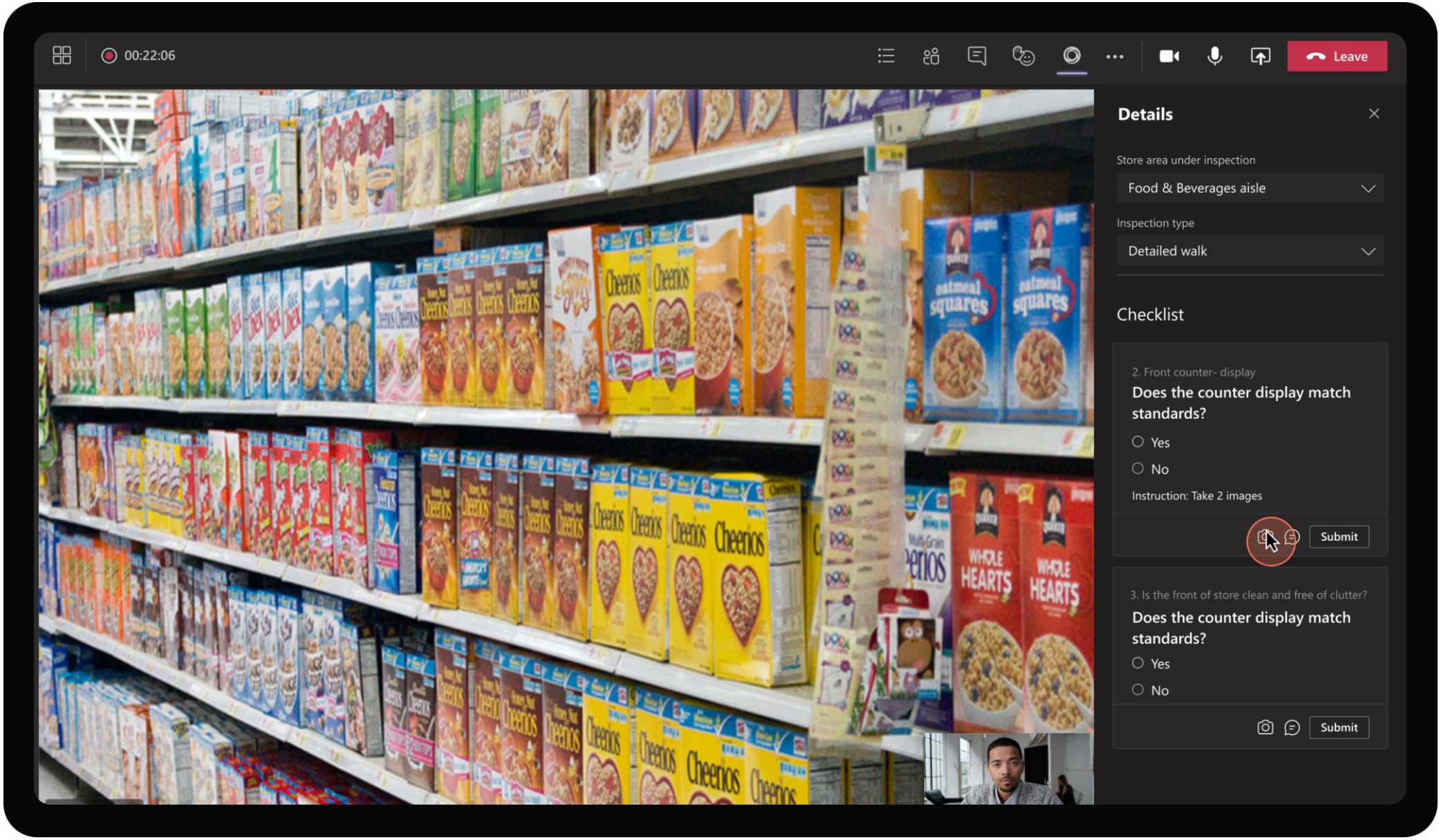
- Store audits are predominantly paper driven processes and have huge scope for automations. Audits typically happen using a checklist, with copious notes taken for filing. Meeting apps can help in providing an intuitive interface for managers and associates to complete audit while in a meeting
- The audit inspections templates also provide a rich set of instructions and guidance for store manager to look for right elements and adhere to latest standards and guidelines released by corporate headquarters for all stores to follow.

Possible Integrations

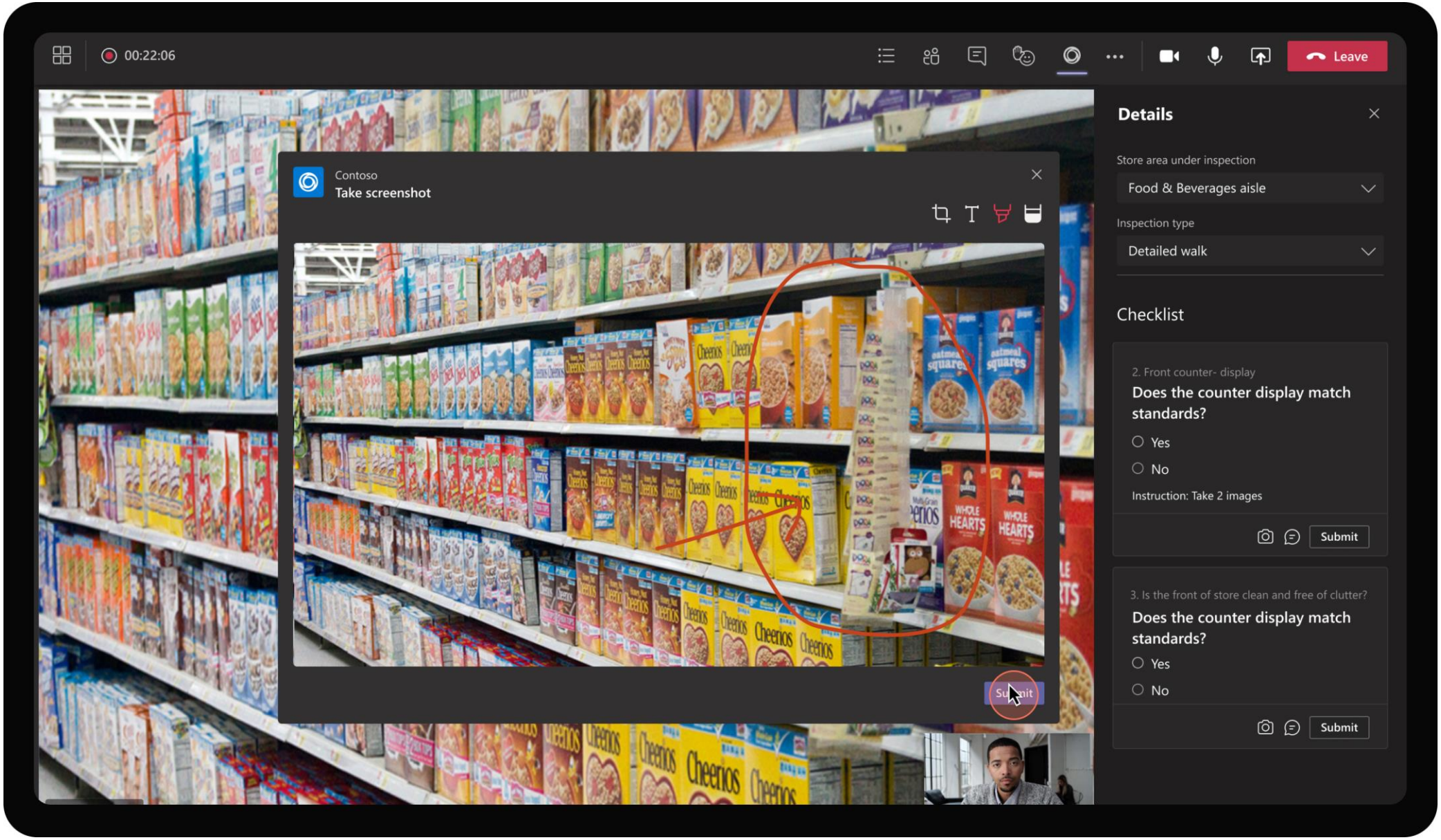
Inspection Reports DB

PBI Dashboards

Audit Checklist KB

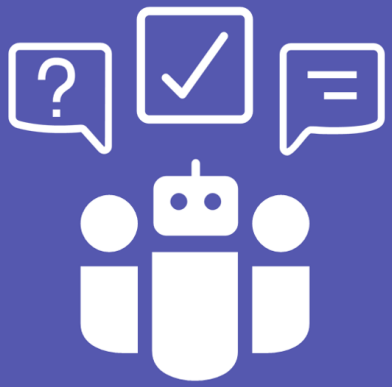


Miguel gets on a call with Store associate who takes him on a virtual walk of the store. During the call, Miguel can pick and choose checklists for different sections of the store. Based on checklist chosen, the app allows Miguel to update the checklists using the information from Teams video call



As Miguel finds a discrepancy on the way items are arranged on the shelf, he quickly takes a screenshot using the app, annotates and calls out the area of the shelf that doesn't align to the standards

The images with annotations get saved along with checklist submissions. In subsequent discussions, reviews, the picture, submitted report can be brought up for course correction or sharing best practices



Appendix

Thank you!

Start exploring

- Check out documentation around Apps in Teams meetings - Apps in Teams meetings - Teams | Microsoft Docs
- Play around with Teams App Studio, Node.js, and c#/.NET
- Understand capabilities of the Teams extensible platform
- Explore our design templates, Ui Guides - Designing your custom app - Teams | Microsoft Docs

Get started developing

- Teams Developer Documentation
- Teams Sample Code on GitHub
- Meeting app sample

Leverage Teams in-house experts

- Discuss scenarios, best practices, and workarounds
- Send Microsoft platform feature asks to Sathya (saraveen@microsoft.com)