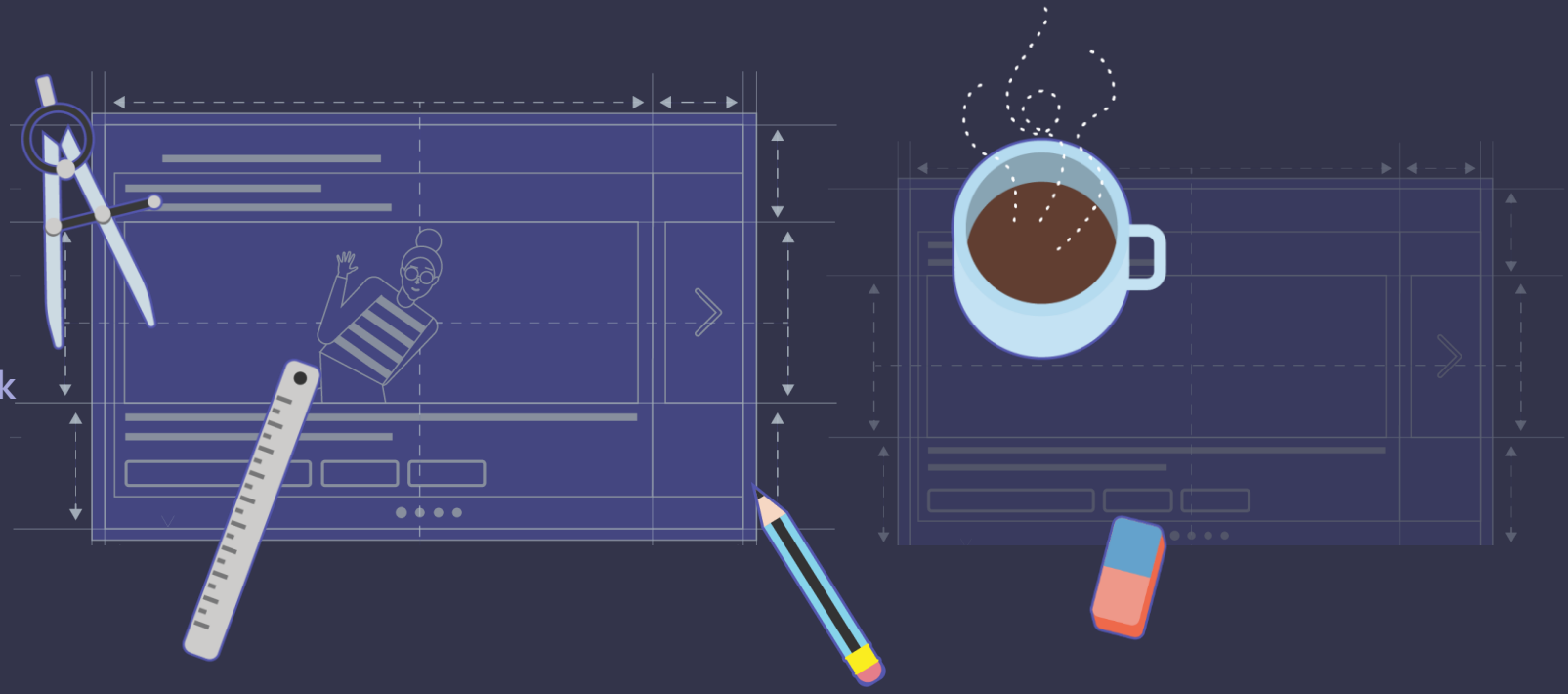
# Best Practices

## Pitching your app with a Scenario Playbook



Microsoft Teams Ecosystem

# Pitching your Teams App to your customers

So you've built your Teams app! Now you need to showcase this app to your customers.
A *Scenario Playbook* is a great way to do this.

# What is a Scenario Playbook?

A Scenario playbook is a document or presentation that can help your customers understand how your app can be used by its target personas. It should be visual, comprehensive and easy to distribute. Here are some best practices -

# Identify your main user personas

Before you can create your scenario playbook, identify who your main user personas are and the scenarios that your app enables for these personas. Let’s understand this with an example

# Contoso Helpdesk

Efficiently manage customer queries

Teams

| | |
|---|---|
| Customer Support Agent (CSA) | • As a CSA, I want to be notified about new customer enquiries, respond to the customer & update support tickets from within Teams.<br>• As a CSA, I want to be able to share & discuss tickets with other CSA when I need some assistance |
| CSA manager | • As a CSA manager, I want to view my team's performance in a dashboard and discuss tickets with CSAs. |

# Humanize your user personas

To give user personas a name and a face, and create a sample organization using Teams, you can leverage the Microsoft 365 Developer program which comes with Sample data packs and sample users.

Microsoft 365 > Developer Program > Dashboard

# Microsoft 365 Developer Program

Delete Profile

## Your Microsoft 365 developer subscriptions

To learn more about how to work with your subscription, see Build Microsoft 365 solutions.

Domain name
Babakshammas.microsoft.com

**Renewable E5**
subscription
Expires on Feb 3, 2022

65/121
days left

Administrator
Babakshammas.microsoft.com
n.onmicrosoft.com

Users
25 user licenses

Go to subscription

Sample data packs

Users | Mail & Events | SharePoint

Aadi Kapoor

Daniela Mandera

Aaron Buxton

Babak Shammas

Beth Davis

Bruno Zhao

Bryan Wright

Cassandra Drum

Charlotte De Crum

Danielle Brooker

David Power

Eric Ishida

# Create a story around your User personas and scenarios

Now that you have humanized your user personas and listed your scenarios, you can create a descriptive story to show how your Teams app is used to get work done.

# Using Contoso Helpdesk in Microsoft Teams

Microsoft

**Aadi Kapoor**
Customer Support Agent (CSA)

I want to be notified about new customer enquiries, respond to the customer & update support tickets from within Teams.

**Daniela Mandera**
Customer Support Agent (CSA)

I want to be able to share & discuss tickets with other CSA when I need some assistance

**Bryan Wright**
CSA Manager

I want to view my team's performance in a dashboard and discuss tickets with CSAs.

Customer enquiry scenario

Contoso Helpdesk

## Scenario Walkthrough

A new customer of Contoso sends an enquiry and is eager to hear back. Aadi Kapoor receives a notification in Teams and a ticket is automatically created. He now talks to the customer for additional details. He does want some help on the issue and so reaches out to his colleage Daniella for some advice on solving the customer problem. Daniella and Aadil work on the problem together and get back to the customer with a solution.

Bryan later in the day sees the good work that Aadi and Daniela have done and appreciates them.

# Create compelling visuals using sample users

Use your fictitious user personas (that are part of your sample user pack) in M365 developer account, login into Teams using multiple users and create screenshots/GIFs of the user experience

Showcase the user experience from each user persona’s point of view.

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7/27/2018

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Reviewers 5/2
Darren: Thats fine with me

## Bryan Wright

Chat Files +

2 Call

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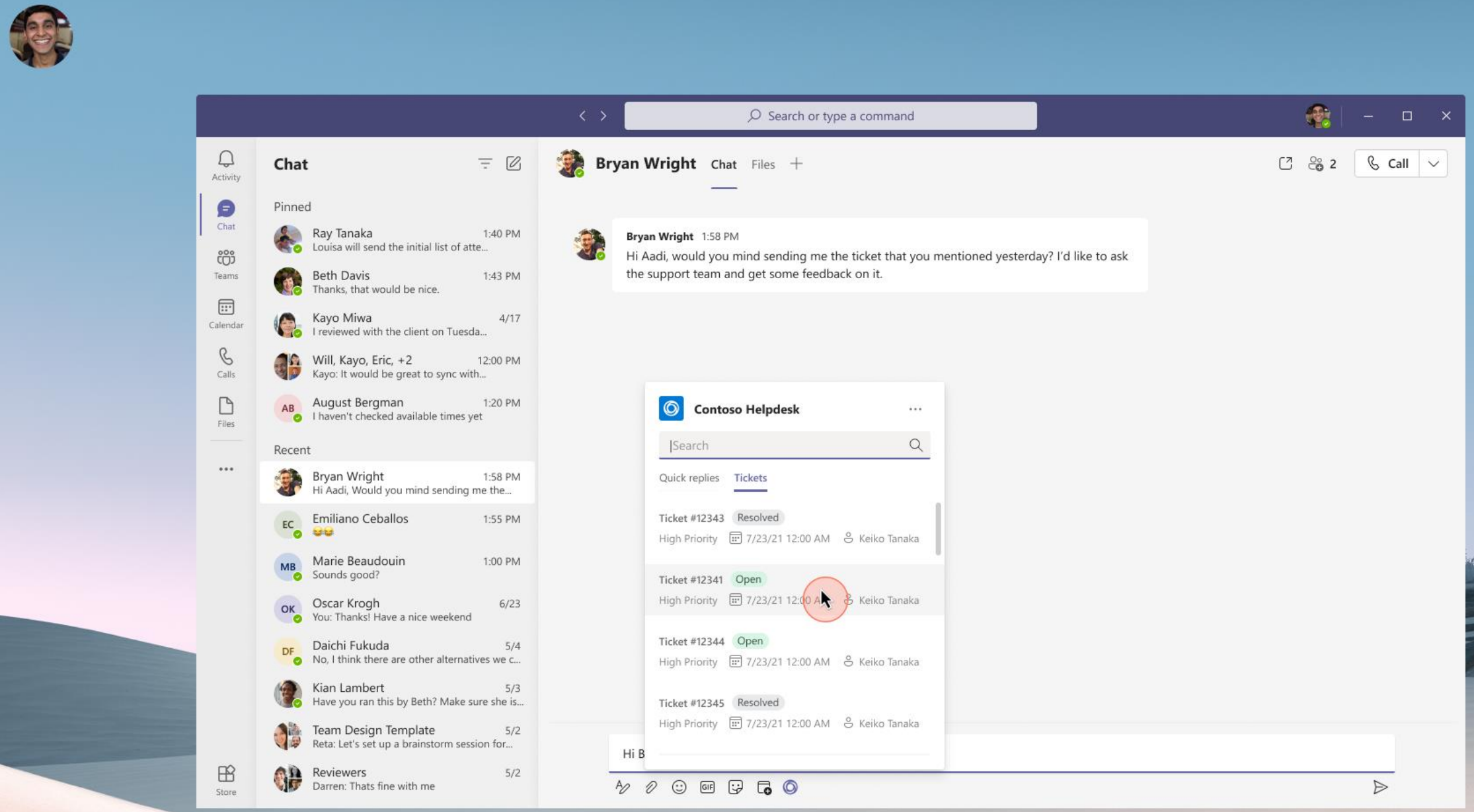
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Contoso Helpdesk
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Quick replies Tickets
Ticket #12343 Resolved
High Priority 7/23/21 12:00 AM Keiko Tanaka
Ticket #12341 Open
High Priority 7/23/21 12:00 AM Keiko Tanaka
Ticket #12344 Open
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### Ticket #12341

Not receiving shipment updates

Hi,
I haven't yet received my recent order (#123445). Can you help me check on the status?
Regards,
Keiko Tanaka

| | |
|---|---|
| **Status** | Open |
| **Priority** | High |
| **Group** | Support team |
| **Agent** | Aadi Kapoor |
| **Responses due** | Fri, Jul 23, 2021 at 12:00 PM |

Add note | Update ticket | View details

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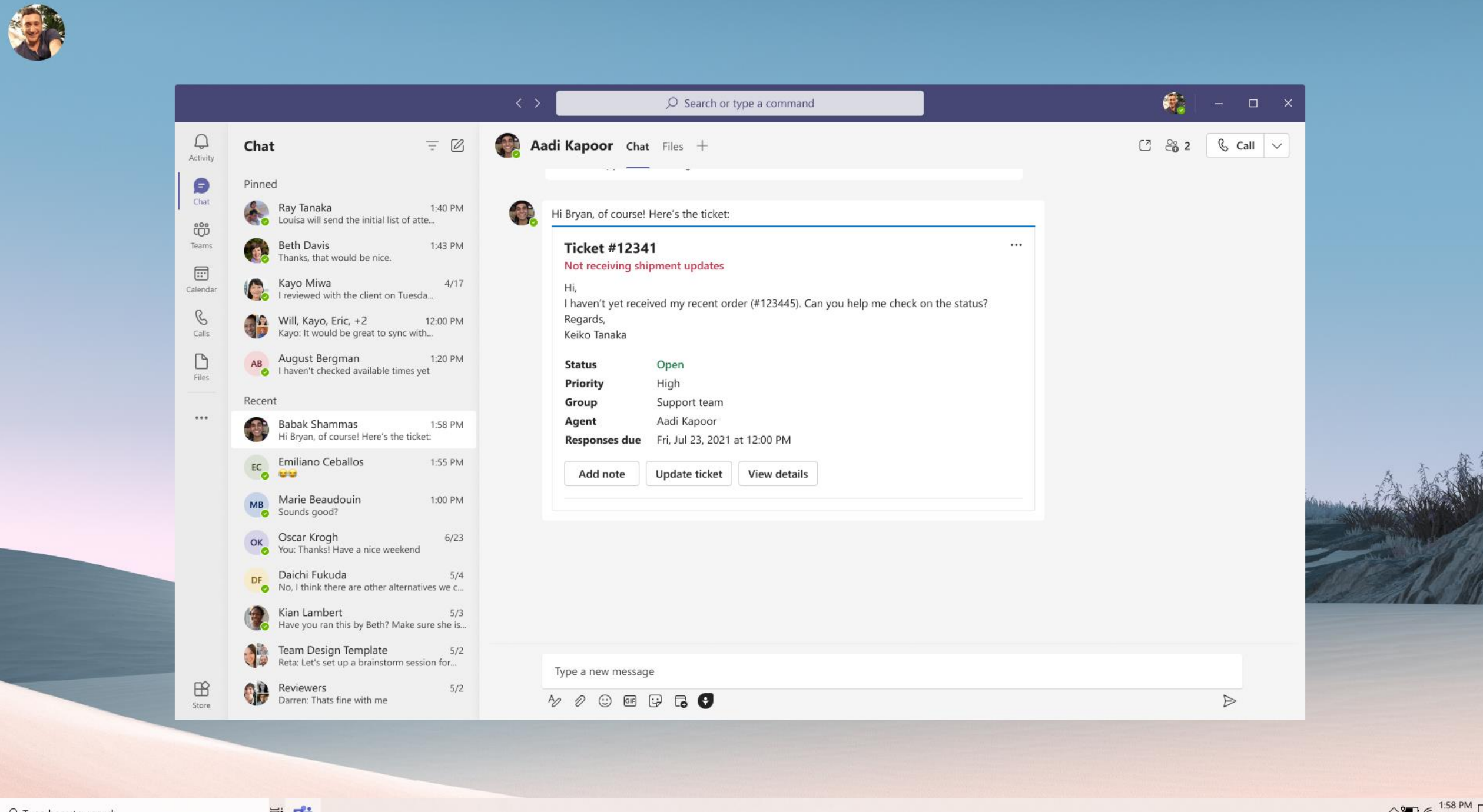
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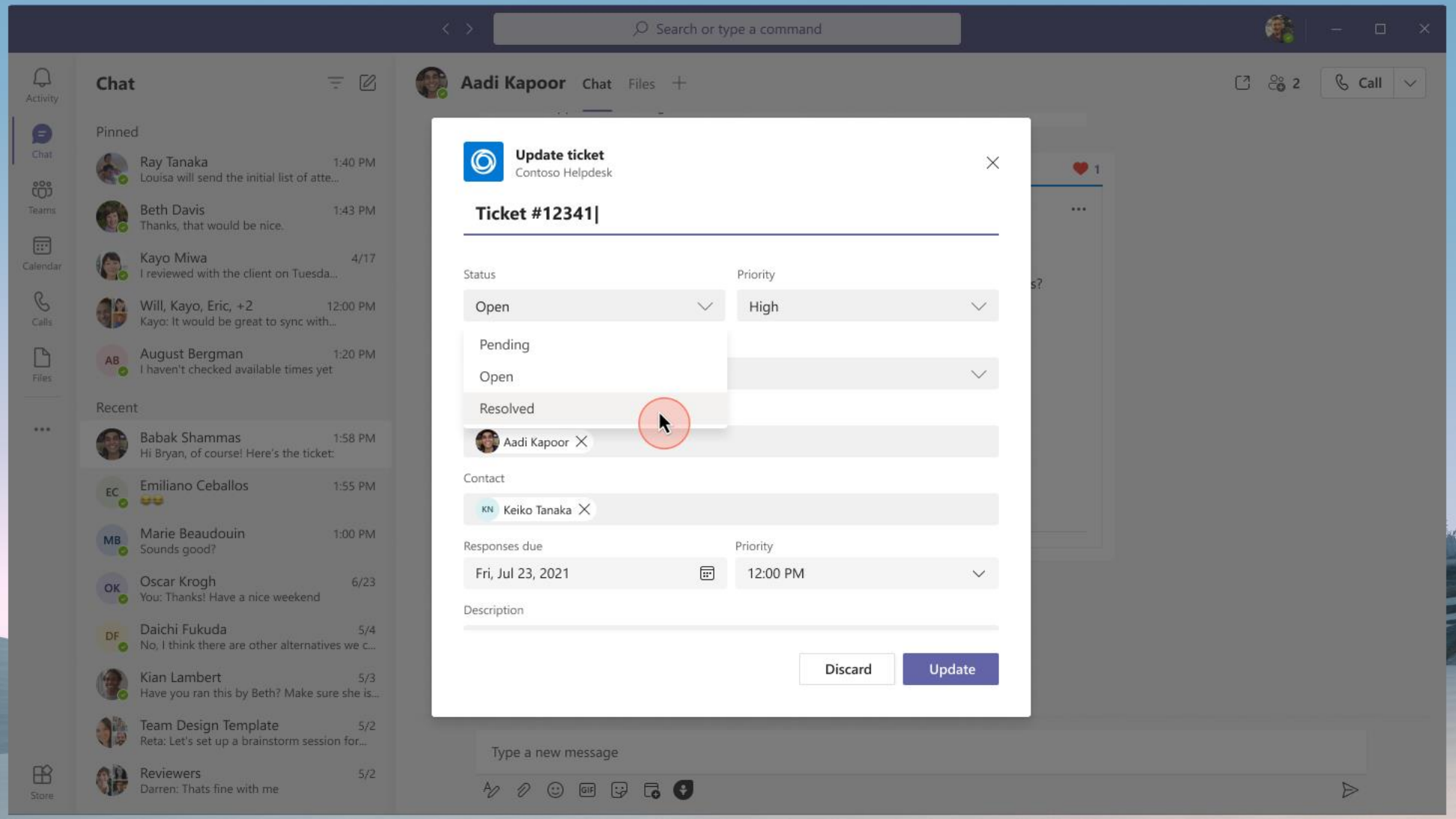
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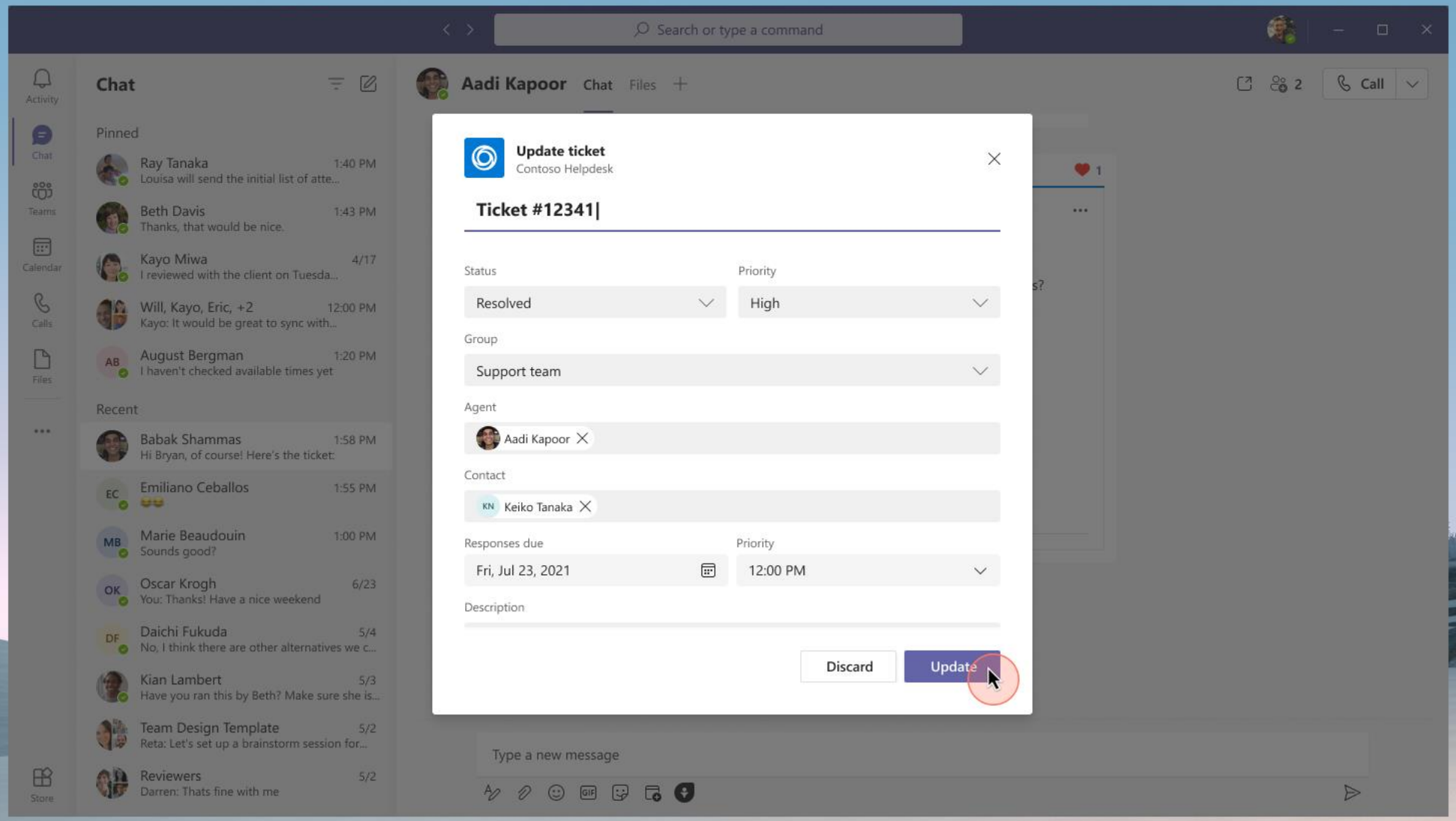
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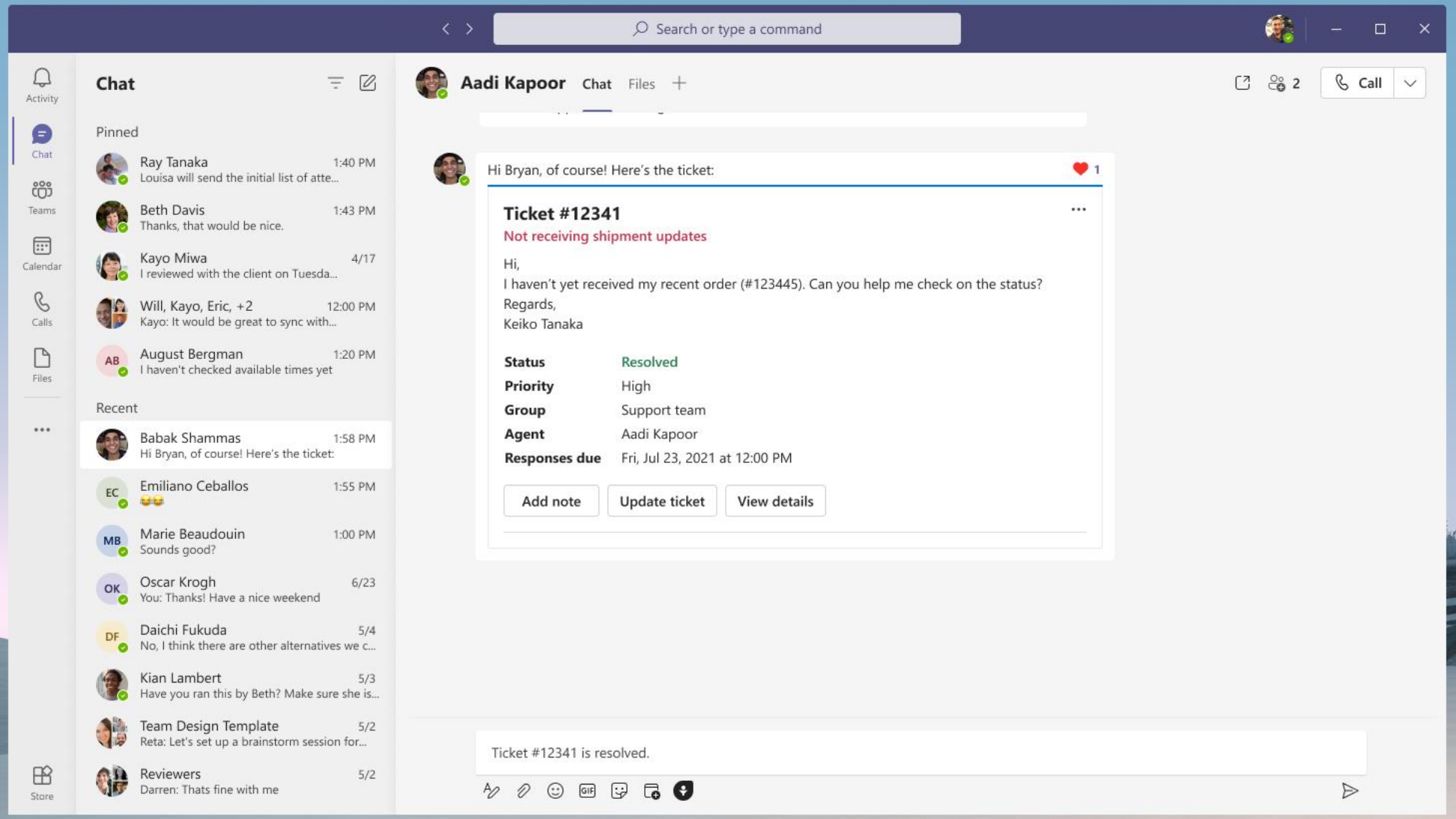
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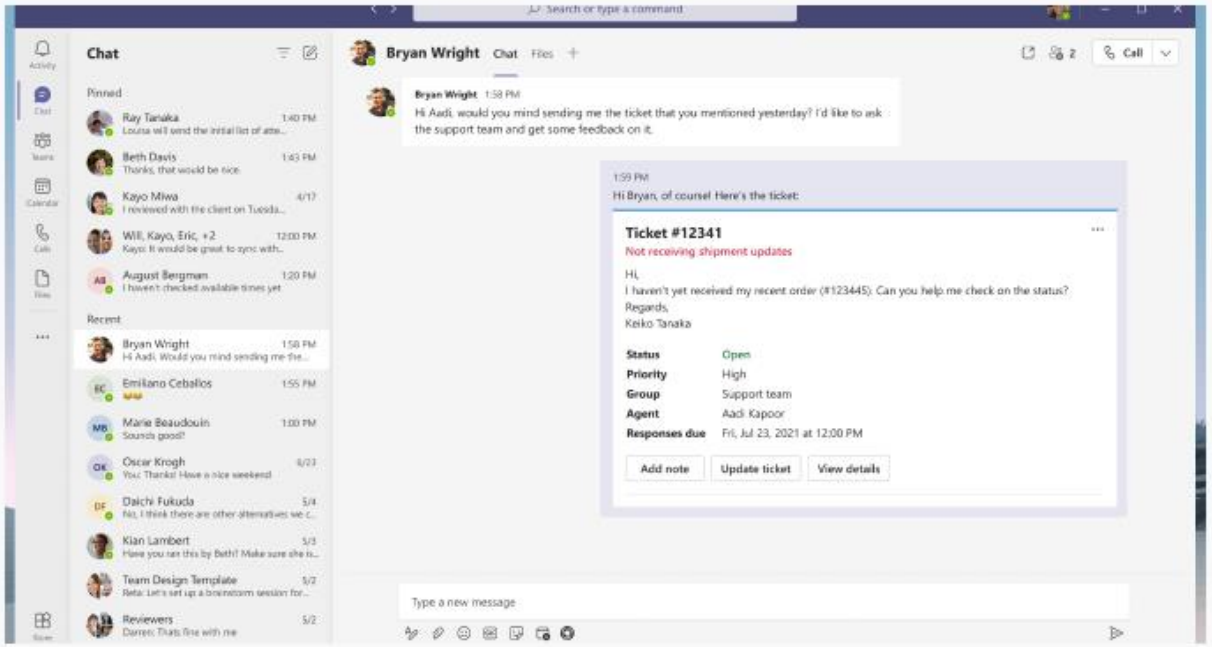
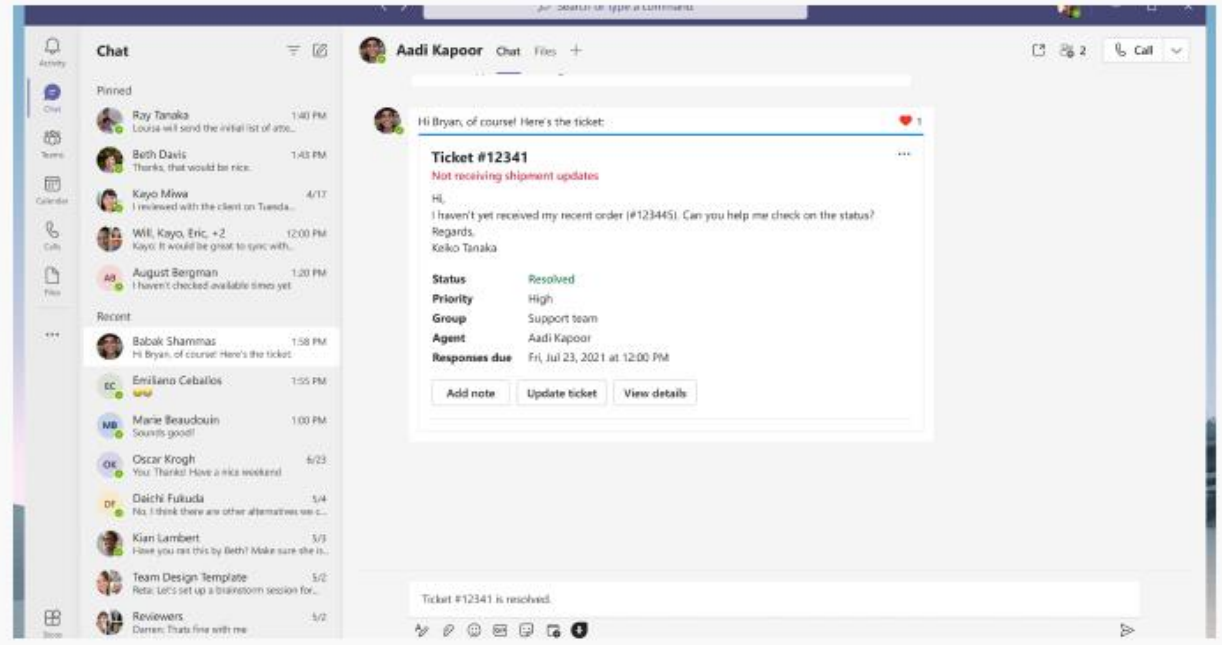


**Bryan Wright**
CSA Manager



# Take screenshots throughout the user journey

Add screenshots from each user’s perspective and help your customers visualize the journey each user takes in your Teams app

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Add note | Update ticket | View details

Type a new message

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1:58 PM
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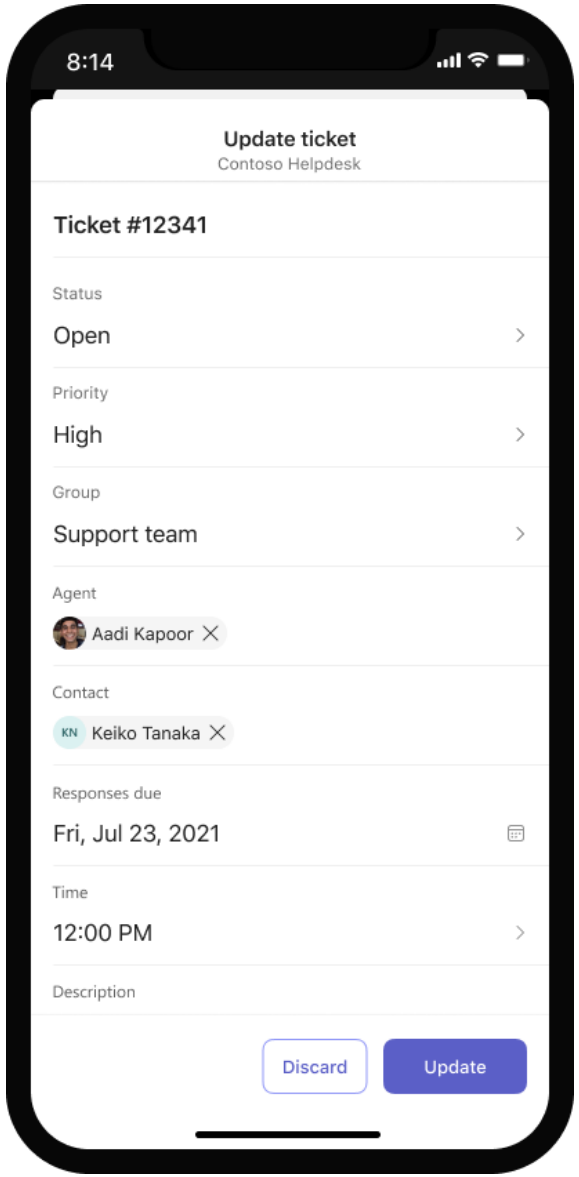
# Be sure to add a Mobile experience

Show your customers what these experiences look like on mobile. Microsoft Teams users are increasingly engaging with Teams apps via mobile – be sure to talk about your Teams app’s mobile experience.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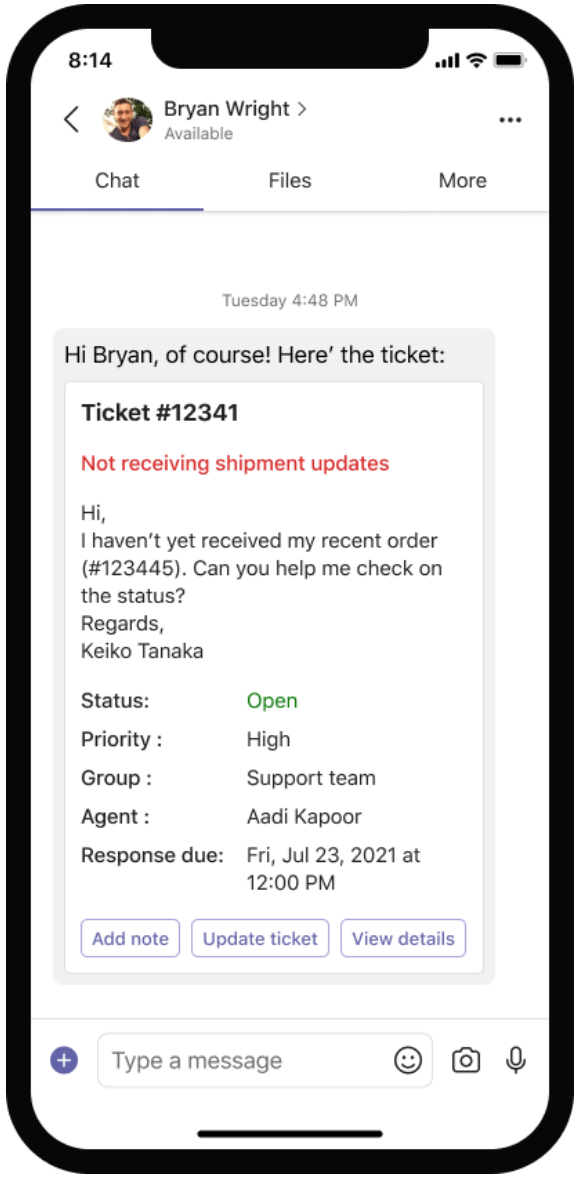
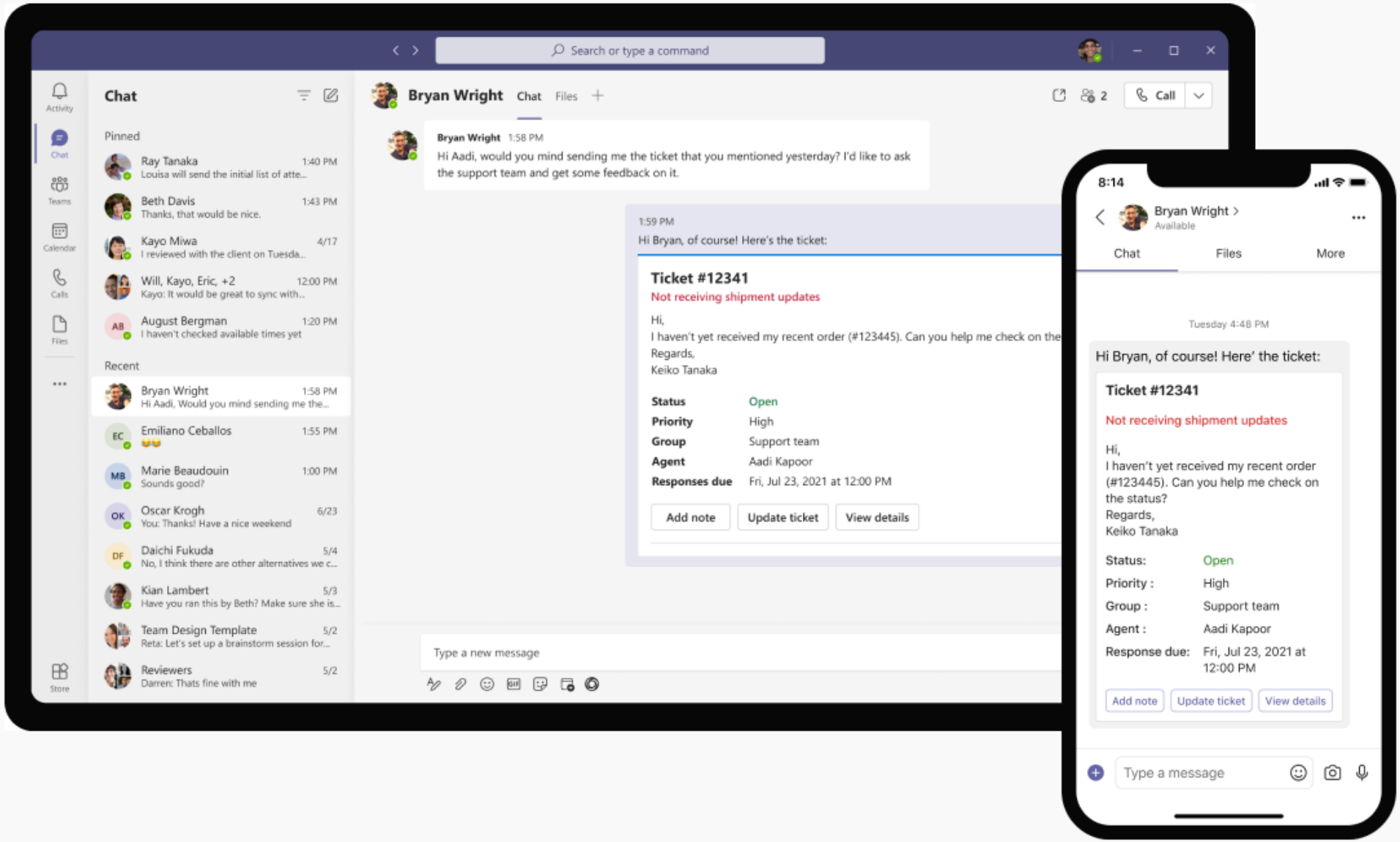
Discard
Update

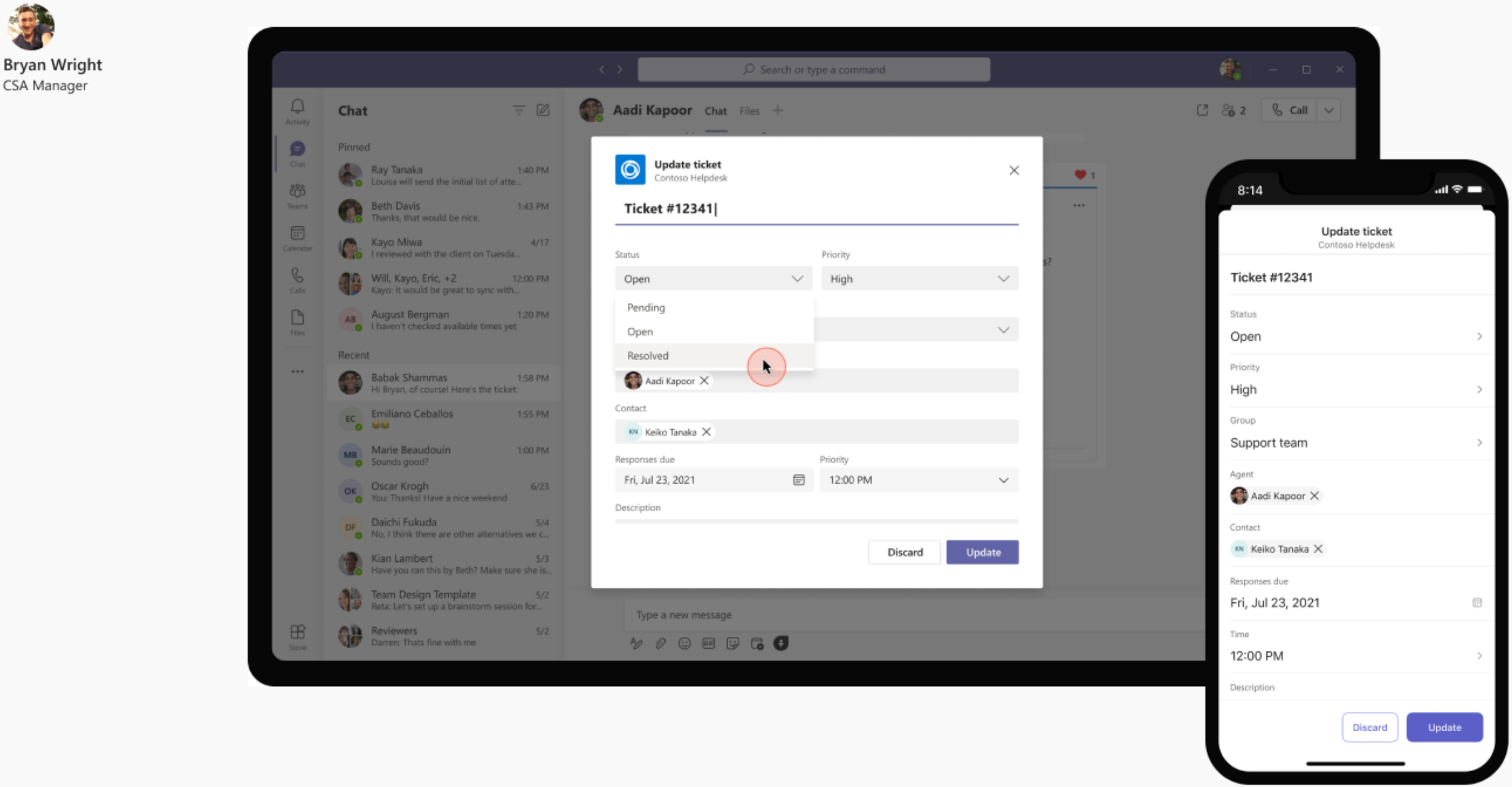

8:14
Bryan Wright
Available
Chat
Files
More
Tuesday 4:48 PM
Hi Bryan, of course! Here' the ticket:
Ticket #12341
Not receiving shipment updates
Hi,
I haven't yet received my recent order (#123445). Can you help me check on the status?
Regards,
Keiko Tanaka
Status: Open
Priority : High
Group : Support team
Agent : Aadi Kapoor
Response due: Fri, Jul 23, 2021 at 12:00 PM
Add note
Update ticket
View details
Type a message

# Bring it all together

Combine your desktop and mobile screenshots and showcase your end-to-end user journey

**Aadi Kapoor**
Customer Support Agent (CSA)




Bryan Wright
CSA Manager
Search or type a command
Chat
Pinned
Ray Tanaka 1:40 PM
Louisa will send the initial list of atte...
Beth Davis 1:43 PM
Thanks, that would be nice.
Kayo Miwa 4/17
I reviewed with the client on Tuesda...
Will, Kayo, Eric, +2 12:00 PM
Kayo: It would be great to sync with...
August Bergman 1:20 PM
I haven't checked available times yet
Recent
Babak Shammas 1:58 PM
Hi Bryan, of course! Here's the ticket:
Emiliano Ceballos 1:55 PM
Marie Beaudouin 1:00 PM
Sounds good?
Oscar Krogh 6/23
You: Thanks! Have a nice weekend
Daichi Fukuda 5/4
No, I think there are other alternatives we c...
Kian Lambert 5/3
Have you ran this by Beth? Make sure she is...
Team Design Template 5/2
Reta: Let's set up a brainstorm session for...
Reviewers 5/2
Darren: Thats fine with me
Aadi Kapoor Chat Files
Call
Update ticket
Contoso Helpdesk
Ticket #12341
Status
Open
Priority
High
Pending
Open
Resolved
Aadi Kapoor
Contact
Keiko Tanaka
Responses due
Fri, Jul 23, 2021
Priority
12:00 PM
Description
Discard
Update
Type a new message
8:14
Update ticket
Contoso Helpdesk
Ticket #12341
Status
Open
Priority
High
Group
Support team
Agent
Aadi Kapoor
Contact
Keiko Tanaka
Responses due
Fri, Jul 23, 2021
Time
12:00 PM
Description
Discard
Update

# Add details about your product, USP, pricing, etc.

Once customers are impressed with the visual scenarios, they would be interested to know more about your product, its pricing, comparison with competing products, contact details, etc.

Most popular

## $0 /user

### Pilot

Amet minim mollit non deserunt ullamco est sit aliqua dolor do amet sint.

- ✓ Contact management
- ✓ Internal collaboration
- ✗ Help desk
- ✗ Storage

Get started

## $21 /month

### Professional

Amet minim mollit non deserunt ullamco est sit aliqua dolor do amet sint.

- ✓ Contact management
- ✓ Internal collaboration
- ✓ Help desk
- ✗ Storage

Start free trial

## $210 /month

### Enterprise

Amet minim mollit non deserunt ullamco est sit aliqua dolor do amet sint.

- ✓ Contact management
- ✓ Internal collaboration
- ✓ Help desk
- ✓ Storage

Start free trial

# Are my clients happy?

Amet minim mollit non deserunt ullamco est sit aliqua dolor do amet sint. Amet minim mollit non deserunt ullamco est sit aliqua dolor do amet sint.

**Istiak Ahmed**
CEO, Avito

Amet minim mollit non deserunt ullamco est sit aliqua dolor do amet sint.

**Rahul Deb**
CEO, Avito

**Ahmed Saimoon**
CEO, Avito

Amet minim mollit non deserunt ullamco est sit aliqua dolor do amet sint. Amet minim mollit non deserunt ullamco est sit aliqua dolor do amet sint.

**Nazmul Karim**
CEO, Avito

Amet minim mollit non deserunt ullamco est sit aliqua dolor do amet sint.

**Amir Khan**
CEO, Avito

Amet minim mollit non deserunt ullamco est sit aliqua dolor do amet sint.

# All done! Good luck pitching your Teams App to your customers with a great Scenario Playbook