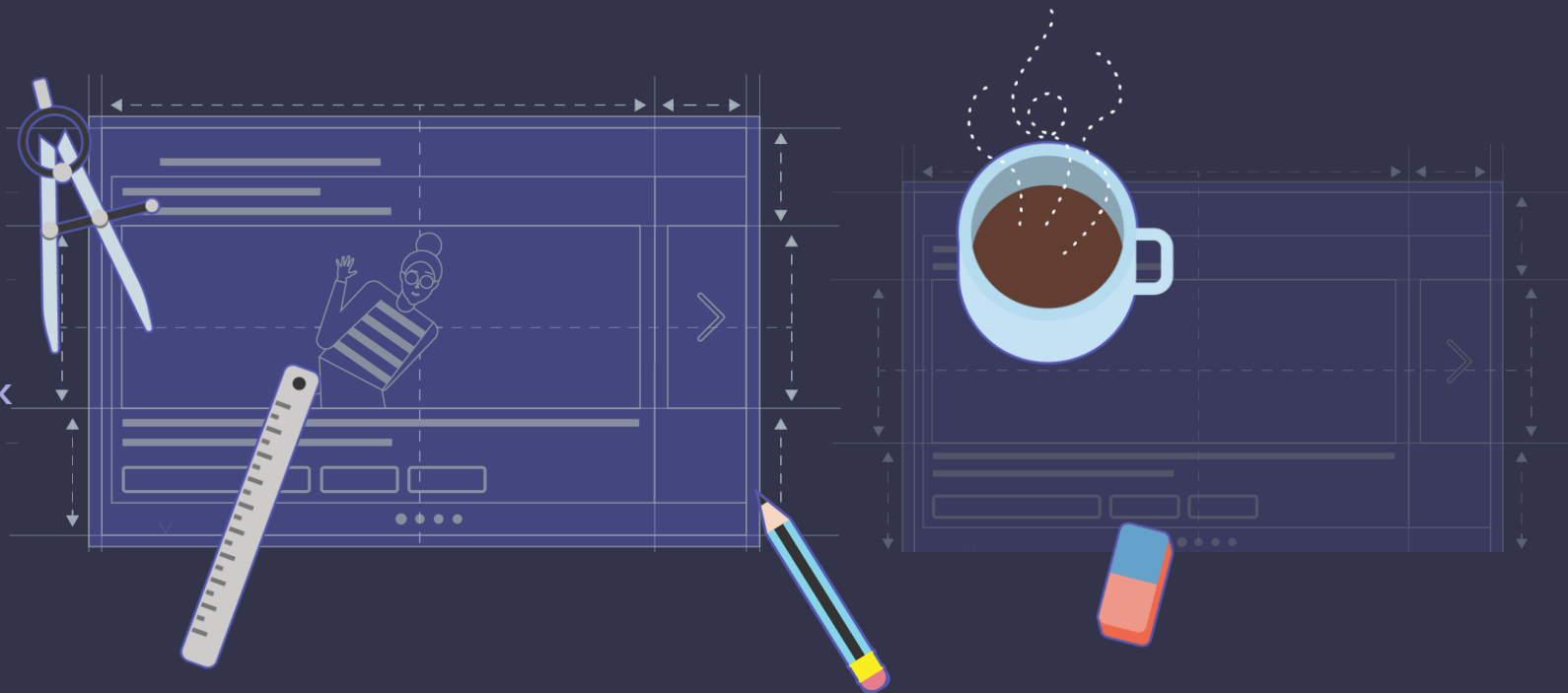


# Best Practices

Pitching your app with a Scenario Playbook



# 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.
- 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



[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

Administrator  
Babakshammas.microsoft.com  
nonmicrosoft.com

Users  
25 user licenses



[Go to subscription](#)

Sample data packs

Users	Mail & Events	SharePoint
-------	---------------	------------

 Aadi Kapoor	 Daniela Mander	 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



**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 Mander**

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 colleague 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.



Search or type a command

Contoso Helpdesk Chat Dashboard Contacts and Accounts Deals management Marketing automation Settings Help

Activity Chat Teams Calendar Calls Files Contoso

Welcome to Contoso Helpdesk

Hi there, [Name]!


Here are some helpful tips:

- Alert you with email
- Alert you with text
- Alert you with push notifications
- Provide your contact information

Ready to get started? Sign in

Want to learn more? [Learn more](#)

Contoso Helpdesk About X



**Welcome to Contoso Helpdesk! We're glad you're here.**

Delight your customers and win them for life

[Sign in with Microsoft](#)

[Learn more about Contoso Helpdesk](#)

Type your question here

Store



Microsoft Teams interface showing a chat window with Bryan Wright.

**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**

- Bryan Wright** 1:58 PM  
Hi Aadi, Would you mind sending me the...
- 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: That's fine with me

**Bryan Wright Chat Files +**

Hi Aadi, would you mind sending me the ticket that you mentioned yesterday? I'd like to ask the support team and get some feedback on it.

Hi Bryan, of course! Here's the ticket:

Activity, Chat, Teams, Calendar, Calls, Files, Store, Search or type a command, Call, 2



Microsoft Teams interface showing a chat window with a helpdesk widget.

**Chat**

**Pinned**

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**Bryan Wright Chat**

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Hi Aadi, would you mind sending me the ticket that you mentioned yesterday? I'd like to ask the support team and get some feedback on it.

**Contoso Helpdesk**

Search

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  
High Priority 7/23/21 12:00 AM Keiko Tanaka
- Ticket #12345 Resolved  
High Priority 7/23/21 12:00 AM Keiko Tanaka

Hi B





Search or type a command

< >
Search or type a command
👤 2 📞 Call

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Pinned

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Store

**Bryan Wright** 1:58 PM

Hi Aadi, would you mind sending me the ticket that you mentioned yesterday? I'd like to ask the support team and get some feedback on it.

Hi Bryan, of course! Here's 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

<b>Status</b>	Open
<b>Priority</b>	High
<b>Group</b>	Support team
<b>Agent</b>	Aadi Kapoor
<b>Responses due</b>	Fri, Jul 23, 2021 at 12:00 PM

Add note
Update ticket
View details

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Search or type a command

< >
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👤 2 📞 Call

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**Bryan Wright** Chat Files +

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Add note
Update ticket
View details

📎 📎 😊 📺 🗨️ 📎 📷



Search or type a command

Activity
Chat
Files
Call

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<b>Agent</b>	Aadi Kapoor
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Add note
Update ticket
View details

Type a new message





Search or type a command

Contoso Helpdesk Chat Dashboard Contacts and Accounts Deals management Marketing automation Settings Help

Activity Chat Teams Calendar Calls Files Contoso

Welcome to Contoso Helpdesk

Hi there, [Name]

Here are some helpful tips:

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Ready to get started? Sign in

Want to learn more? [Learn more](#)

Sign in with Microsoft

Learn more about Contoso Helpdesk

Type your question here

Store



Search or type a command

**Chat**

Activity

Chat

Teams

Calendar

Calls

Files

Recent

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**Aadi Kapoor** Chat Files +

2 Call

Hi Bryan, of course! Here's 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  
**Responses due** Fri, Jul 23, 2021 at 12:00 PM

Add note Update ticket View details

Type a new message

📎 📎 😊 📺 🗨️ 📧 ⬇️



Microsoft Teams interface showing a chat window with a ticket card.

**Chat**

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**Chat Header: Aadi Kapoor** Chat Files +

Hi Bryan, of course! Here's the ticket: ❤️ 1

**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

Buttons: Add note, Update ticket, View details

Type a new message



Search or type a command

**Chat**

**Activity**

**Pinned**

- Ray Tanaka 1:40 PM  
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Darren: That's 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

1:58 PM 7/27/2018





Search or type a command

Activity

Chat

Teams

Calendar

Calls

Files

Store

**Chat**

**Pinned**

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Darren: That's fine with me

**Aadi Kapoor** Chat Files +

2 Call

**Update ticket**  
Contoso Helpdesk

**Ticket #12341|**

Status: Resolved Priority: High

Group: Support team

Agent: Aadi Kapoor

Contact: Keiko Tanaka

Responses due: Fri, Jul 23, 2021 Priority: 12:00 PM

Description:

Discard Update

Type a new message

📎 📎 😊 📺 🗨️ 📁 ⬇️



Search or type a command

**Chat**

**Activity**

**Chat**

**Teams**

**Calendar**

**Calls**

**Files**

**Recent**

- Ray Tanaka** 1:40 PM  
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**Aadi Kapoor** Chat Files +

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

Add note Update ticket View details

Ticket #12341 is resolved.

1:58 PM 7/27/2018



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

Search or type a command

**Chat** Bryan Wright Chat Files +

Bryan Wright 1:58 PM  
Hi Aadi, would you mind sending me the ticket that you mentioned yesterday? I'd like to ask the support team and get some feedback on it.

1:59 PM  
Hi Bryan, of course! Here's the ticket:

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*Not receiving shipment updates*

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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](#)

Type a new message



**Bryan Wright**  
CSA Manager

Search or type a command

**Chat** Aadi Kapoor Chat Files +

Hi Bryan, of course! Here's the ticket:

**Ticket #12341**  
*Not receiving shipment updates*

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

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

[Add note](#) [Update ticket](#) [View details](#)

Ticket #12341 is resolved.

# **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





Search or type a command

**Chat**

Activity

Chat

Teams

Calendar

Calls

Files

Recent

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<b>Responses due</b>	Fri, Jul 23, 2021 at 12:00 PM

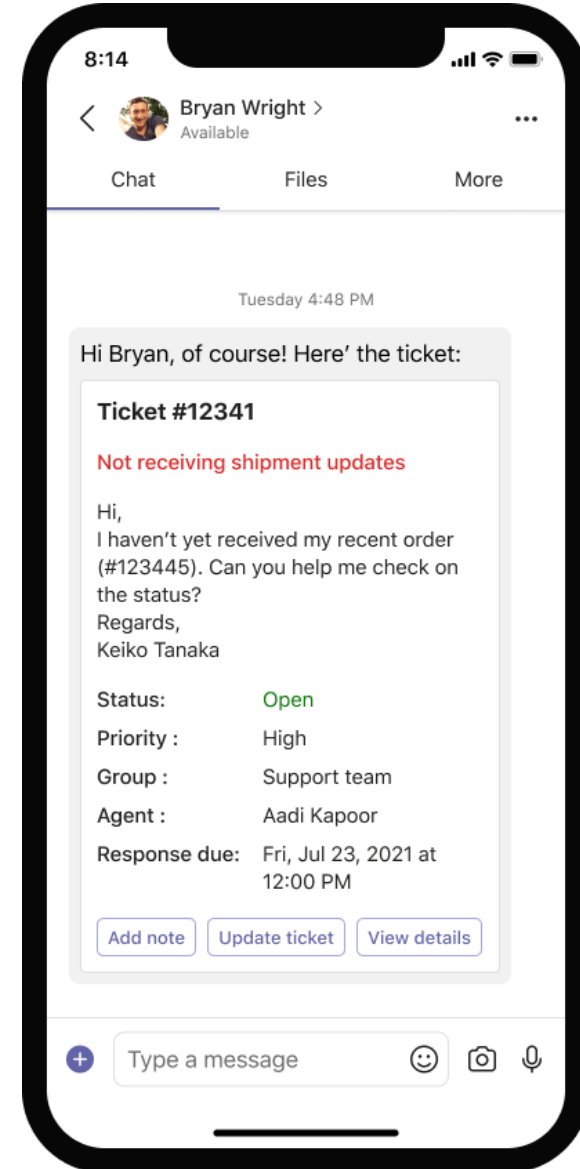
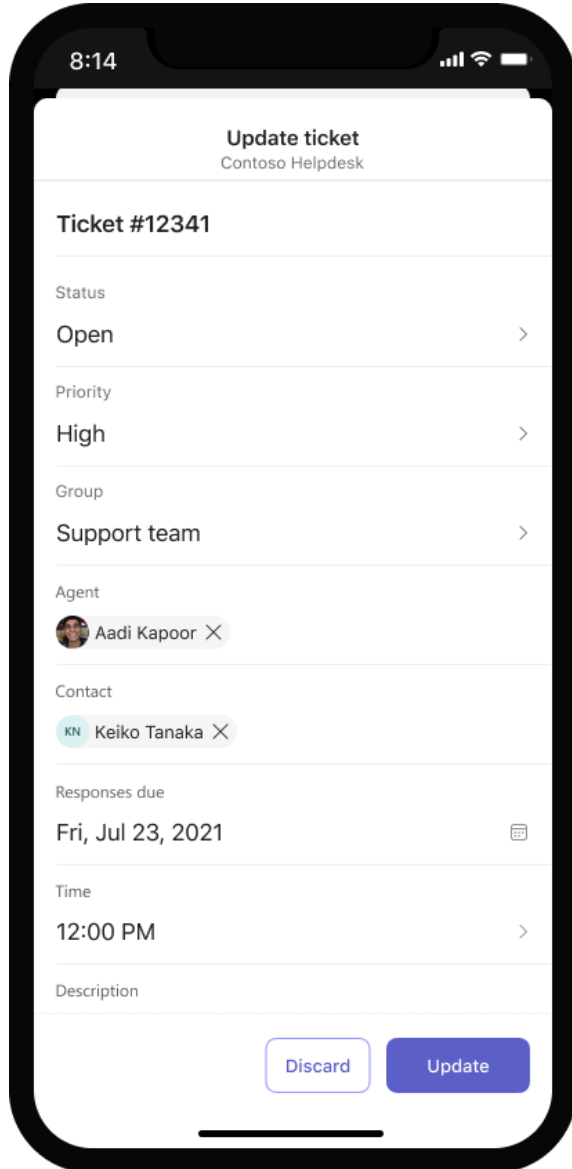
[Add note](#) [Update ticket](#) [View details](#)

Type a new message

📎 📎 😊 📺 🗨️ 📎 📷

## **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.



# **Bring it all together**

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



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

The screenshot shows the Microsoft Teams desktop interface. On the left is a navigation pane with icons for Activity, Chat, Teams, Calendar, Calls, and Files. The main chat window is titled "Bryan Wright" and shows a message from Bryan Wright at 1:58 PM: "Hi Aadi, would you mind sending me the ticket that you mentioned yesterday? I'd like to ask the support team and get some feedback on it." Below this is a card for "Ticket #12341" with the following details:

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

Buttons for "Add note", "Update ticket", and "View details" are visible at the bottom of the card. The chat input area at the bottom says "Type a new message".

The screenshot shows the Microsoft Teams mobile app interface. At the top, the time is 8:14. The chat header shows "Bryan Wright" with a status of "Available". The chat content is identical to the desktop view, showing the message from Bryan Wright and the "Ticket #12341" card. The ticket card details are the same: Status: Open, Priority: High, Group: Support team, Agent: Aadi Kapoor, Responses due: Fri, Jul 23, 2021 at 12:00 PM. Buttons for "Add note", "Update ticket", and "View details" are present. The mobile interface includes a "Type a message" input field at the bottom with icons for attachments, emojis, photos, and voice recording.



Bryan Wright  
CSA Manager

The screenshot shows a Microsoft Teams chat window with a user named Aadi Kapoor. A dialog box titled "Update ticket" from "Contoso Helpdesk" is open, displaying details for "Ticket #12341". The dialog includes dropdown menus for Status (Open, Pending, Resolved) and Priority (High), a contact field with "Keiko Tanaka", and a "Responses due" field set to "Fri, Jul 23, 2021" at "12:00 PM". There are "Discard" and "Update" buttons at the bottom of the dialog. A red circle highlights the "Resolved" option in the status dropdown.

The mobile view of the "Update ticket" dialog box shows the same information as the desktop view, but with a more compact layout. The status is "Open" and the priority is "High". The contact is "Keiko Tanaka" and the response due date is "Fri, Jul 23, 2021" at "12:00 PM". The "Discard" and "Update" buttons are at the bottom.

## **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

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

Start free trial

**\$210** /month

## Enterprise

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

Start free trial



# Are my clients happy?



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**Istiaq Ahmed**  
CEO, Avito  
★★★★★



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**Rahul Deb**  
CEO, Avito  
★★★★★



**Ahmed Saimoon**  
CEO, Avito  
★★★★★

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**Nazmul Karim**  
CEO, Avito

★★★★★

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



**Amir Khan**  
CEO, Avito

★★★★★

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