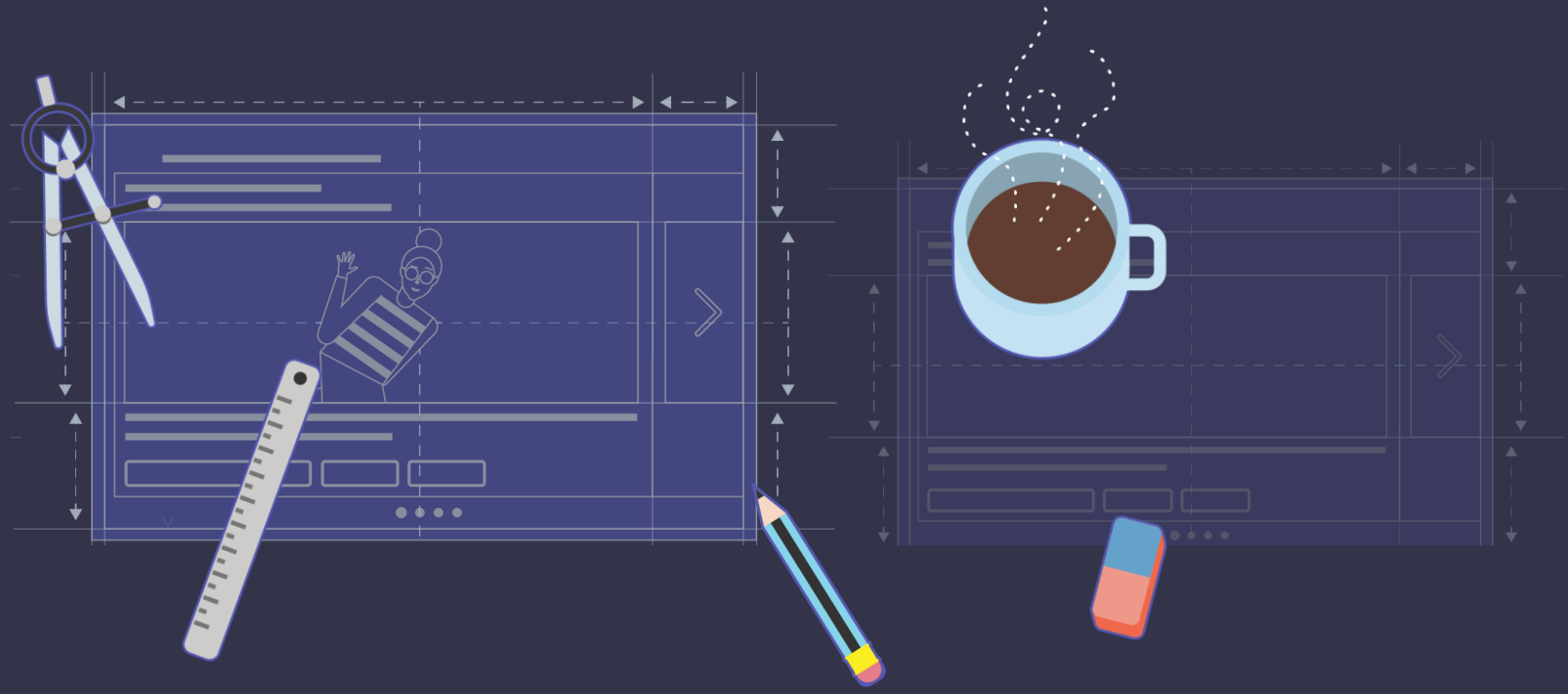
Best Practices

Role based app experiences



Microsoft Teams Ecosystem

Role based app experiences

Create app experiences for different ‘roles’ of users by using Teams Platform capabilities such as bots, tabs & message extensions. Take advantage of user identity information to identify a user role, and then create an experience tailored to those roles. Let us understand this with an example -

Contoso

A typical CRM software app

Megan Bowen

Role

Regional Sales Manager

Fabrikam Industries

Manages a team of Sales Reps

"I am responsible for Sales in my entire region. I also lead a team of Sales reps who each have individual sales targets. I care about their performance, career growth and job satisfaction."

Babak Shammas

Role

Sales Rep

Fabrikam Industries

Reports to Megan Bowen

"I work hard to meet my individual sales target. I look to my manager, Megan for her guidance and leadership and strive to become a better sales person"

Personal tabs

Use the same personal tab to show different content to users with different roles. Make sure to give the personal tab a ‘name’ that makes sense for all user roles – this is because while different users might see different content in the personal tab, they will all see the same personal tab name.

Search or type a command

Babak's View

Activity
Chat
Teams
Calendar
Files
Contoso
Store

Contoso

My Performance | Projects | Datasets

Bookings

$10000
Target

$6350
Bookings done

Progress

63%
Completed

View details

Deals

2000
Target

1540
Deals made

Progress

75%
Completed

View details

Customers

2000
Target

1680
Customers added

Progress

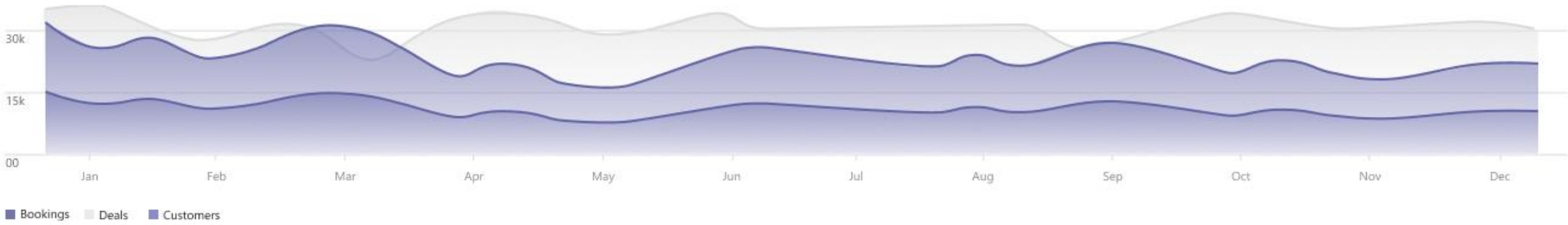
79%
Completed

View details

Sales-to-date

Last updated Thursday, June 18 at 11:11 AM (PT)

30 days | 60 days | 3 months | 6 months | **1 year**



View details

Activity
Chat
Teams
Calendar
Files
Contoso
Store

Contoso

My Performance | Projects | Datasets

Bookings

$ 50000
Target

$ 46700
Bookings done

Progress

79%
Completed

View details

Deals

10000
Target

8350
Deals made

Progress

83%
Completed

View details

Customers

10000
Target

9670
Customers added

Progress

88%
Completed

View details

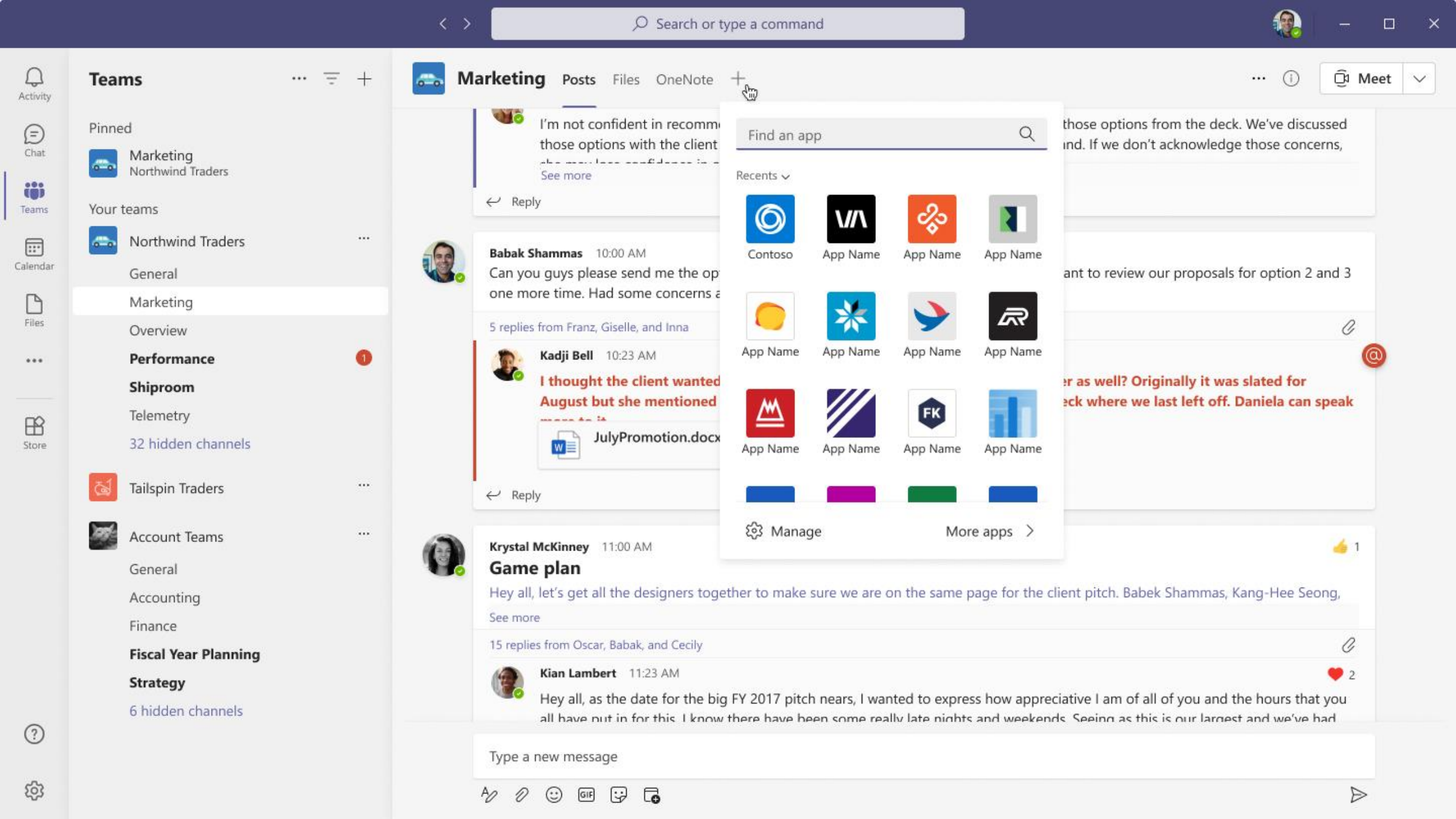
Sales representatives performance

Last updated Thursday, June 18 at 11:11 AM (PT)

Name	Location	Bookings	Deals	Customers	Overall progress
MJ price	Seattle, Wa	$9980 / $10000	1850 / 2000	1910 / 2000	98%
Aaron Buxton	Seattle, Wa	$8870 / $10000	1790 / 2000	1830 / 2000	89%
Alvin Tao	Seattle, Wa	$7653 / $10000	1610 / 2000	1760 / 2000	76%
Babak Shammas	Seattle, Wa	$6350 / $10000	1540 / 2000	1680 / 2000	70%
Beth Davies	Seattle, Wa	$5700 / $10000	1150 / 2000	1340 / 2000	53%

Channel tabs

Use the same channel tab to show different content to users with different roles.


Search or type a command
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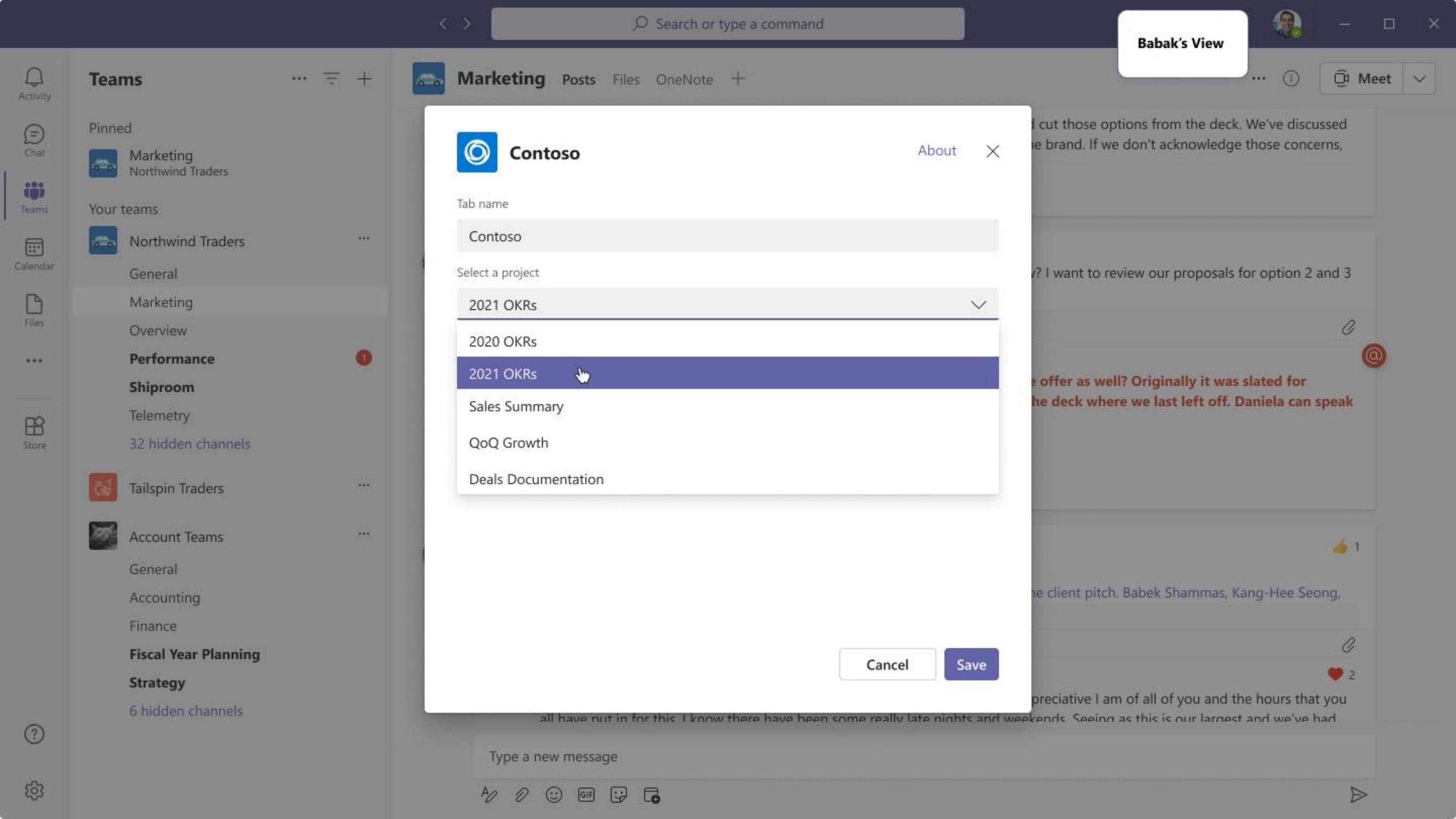
Marketing
Northwind Traders
Your teams
Northwind Traders
General
Marketing
Overview
Performance
Shiproom
Telemetry
32 hidden channels
Tailspin Traders
Account Teams
General
Accounting
Finance
Fiscal Year Planning
Strategy
6 hidden channels
Marketing
Posts
Files
OneNote
Meet
those options from the deck. We've discussed
and. If we don't acknowledge those concerns,
See more
Reply
Babak Shammas 10:00 AM
Can you guys please send me the op
one more time. Had some concerns a
ant to review our proposals for option 2 and 3
5 replies from Franz, Giselle, and Inna
Kadji Bell 10:23 AM
I thought the client wanted
August but she mentioned
er as well? Originally it was slated for
eck where we last left off. Daniela can speak
JulyPromotion.docx
Reply
Krystal McKinney 11:00 AM
Game plan
Hey all, let's get all the designers together to make sure we are on the same page for the client pitch. Babek Shammas, Kang-Hee Seong,
See more
15 replies from Oscar, Babak, and Cecily
Kian Lambert 11:23 AM
Hey all, as the date for the big FY 2017 pitch nears, I wanted to express how appreciative I am of all of you and the hours that you
Type a new message
Find an app
Recents
Contoso
App Name
Manage
More apps


Search or type a command
Babak's View
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Your teams
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Shiproom
Telemetry
32 hidden channels
Tailspin Traders
Account Teams
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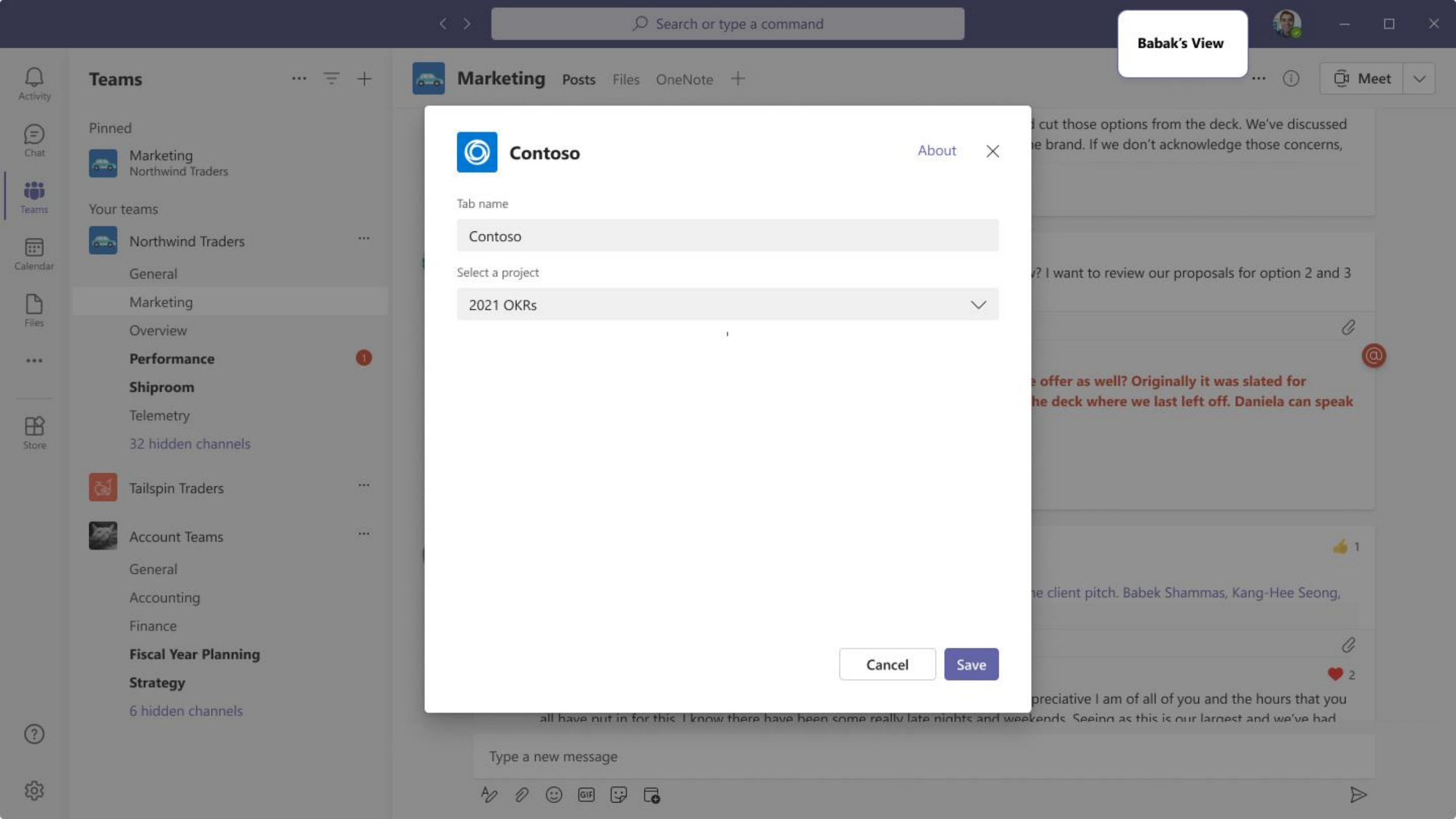
Finance
Fiscal Year Planning
Strategy
6 hidden channels
Marketing
Posts
Files
OneNote
Meet
Contoso
About
Tab name
Contoso
Select a project
2021 OKRs
2020 OKRs
2021 OKRs
Sales Summary
QoQ Growth
Deals Documentation
Cancel
Save
Type a new message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6 hidden channels
Marketing
Posts
Files
OneNote
Meet
Contoso
About
Tab name
Contoso
Select a project
2021 OKRs
Cancel
Save
Type a new message

Search or type a command

Babak's View

Activity
Chat
Teams
Calendar
Files
Store

Teams

Pinned

Marketing
Northwind Traders

Your teams

Northwind Traders
- General
- Marketing
- Overview
- **Performance**
- **Shiproom**
- Telemetry
- 32 hidden channels

Tailspin Traders

Account Teams
- General
- Accounting
- Finance
- **Fiscal Year Planning**
- **Strategy**
- 6 hidden channels

Marketing

Posts Files OneNote

Meet

New category Export Filter Find

Team OKRs

Sales calls made
1250
Target 1120
Team average 980

Demos given
1654
Target 1820
Team average 900

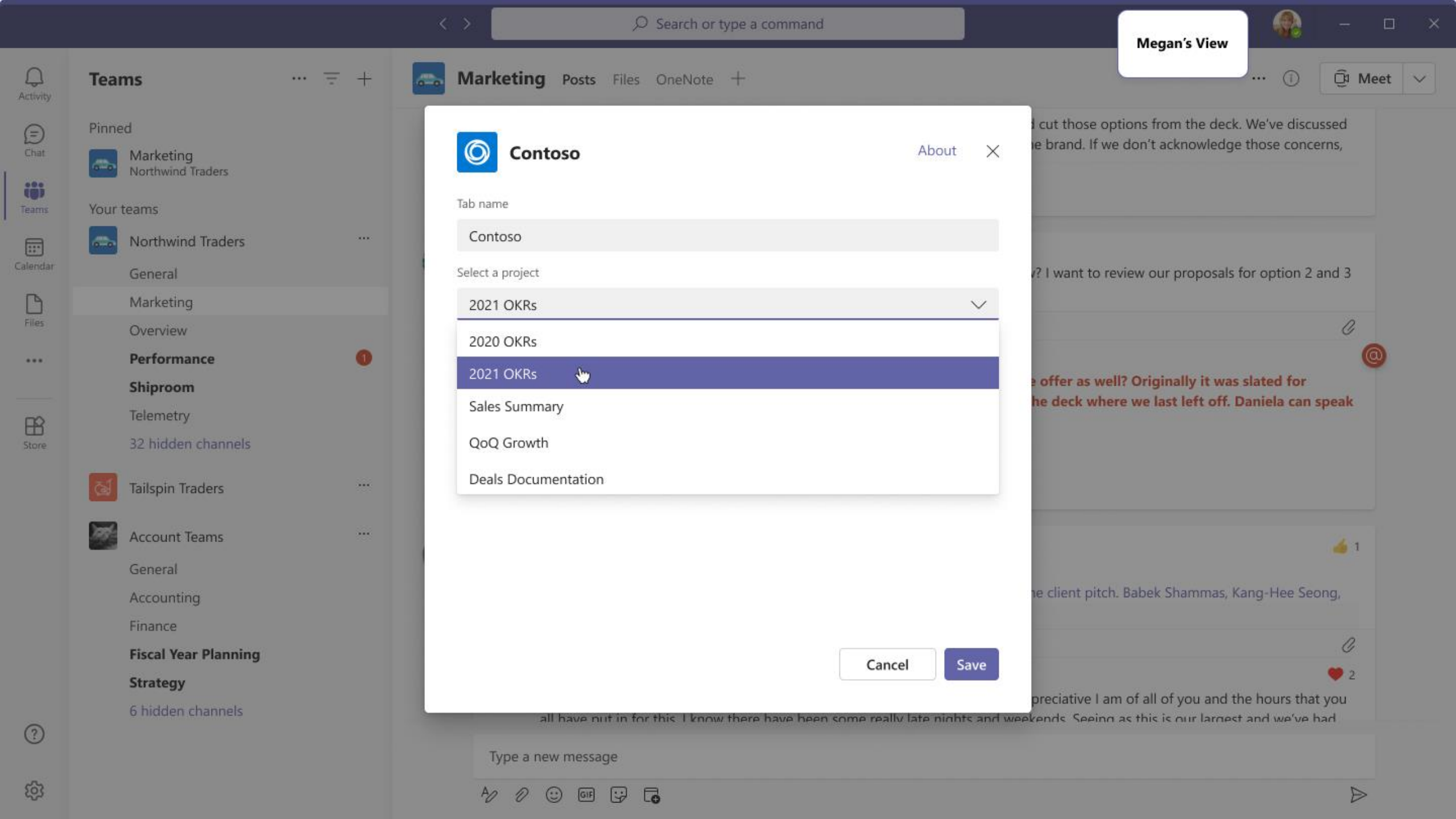
Trial sign ups
879
Target 920
Team average 650

See more

My OKRs

2021 OKRs
Quarter ending March '21

Trend Chart	OKRs	Total	Target	Team Average
	Sales calls made	1250	1120	980
	Demos given	1654	1820	900
	Trial sign ups	879	920	650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Megan's View
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Teams
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Marketing
Northwind Traders
Your teams
Northwind Traders
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Marketing
Posts
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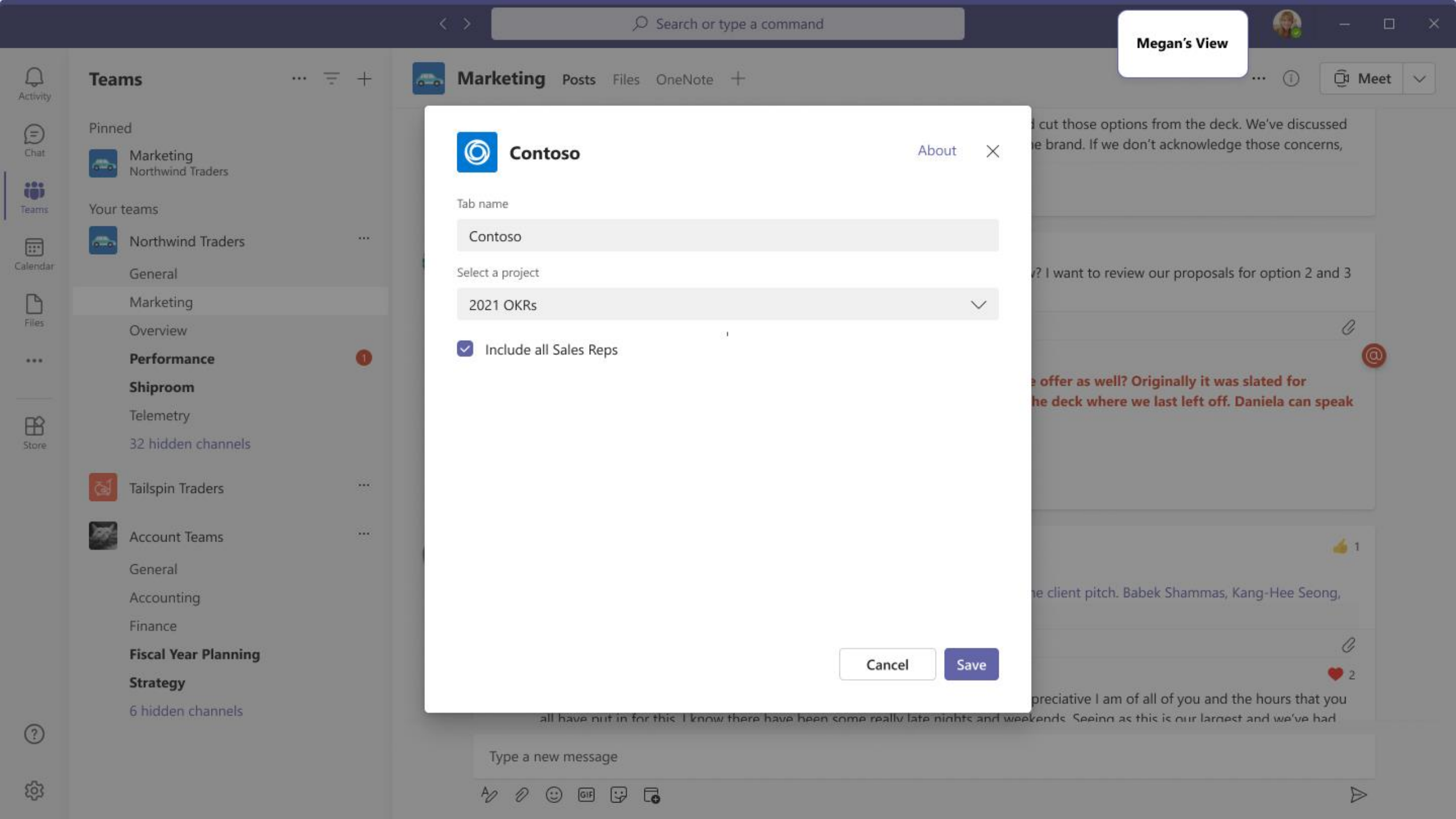
OneNote
Meet
Contoso
About
Tab name
Contoso
Select a project
2021 OKRs
2020 OKRs
2021 OKRs
Sales Summary
QoQ Growth
Deals Documentation
Cancel
Save
Type a new message


Search or type a command
Megan's View
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Northwind Traders
Your teams
Northwind Traders
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Tailspin Traders
Account Teams
General
Accounting
Finance
Fiscal Year Planning
Strategy
6 hidden channels
Marketing
Posts
Files
OneNote
Meet
Contoso
About
Tab name
Contoso
Select a project
2021 OKRs
Include all Sales Reps
Cancel
Save
cut those options from the deck. We've discussed
e brand. If we don't acknowledge those concerns,
? I want to review our proposals for option 2 and 3
offer as well? Originally it was slated for
he deck where we last left off. Daniela can speak
1
e client pitch. Babek Shammas, Kang-Hee Seong,
2
preciative I am of all of you and the hours that you
Type a new message

Search or type a command

Megan's View

Activity
Chat
Teams
Calendar
Files
Store

Teams

Pinned

Marketing
Northwind Traders

Your teams

Northwind Traders
- General
- Marketing
- Overview
- **Performance**
- **Shiproom**
- Telemetry
- 32 hidden channels

Tailspin Traders

Account Teams
- General
- Accounting
- Finance
- **Fiscal Year Planning**
- **Strategy**
- 6 hidden channels

Marketing

Posts | Files | OneNote | Contoso | +

Meet

+ New category | Export | Filter | Find

Team OKRs

Sales calls made
1250
Target 1120
Team average 980

Demos given
1654
Target 1820
Team average 900

Trial sign ups
879
Target 920
Team average 650

See more

All Sales OKRs

2021 OKRs
Quarter ending March '21

All Sales Reps OKRs | My OKRs

Trend Chart	Sales Reps	Total OKRs	Target	Average
	Babak Shammassa	1250	1120	980
	Hilary Reyes	1654	1820	900

Messaging extension

Use the same messaging extension to show different content to users with different roles.

Search or type a command

Babak's View

Activity
Chat
Teams
Calendar
Files
Store

Teams

Pinned

Marketing
Northwind Traders

Your teams

Northwind Traders
General
Marketing
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Shiproom
Telemetry
32 hidden channels

Tailspin Traders

Account Teams
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Finance
Fiscal Year Planning
Strategy
6 hidden channels

Marketing

Posts Files OneNote

Meet

I'm not confident in recommending option 2 or 5 again and feel that we should cut those options from the deck. We've discussed those options with the client before and she believes those are too costly for the brand. If we don't acknowledge those concerns,

See more

Reply

Babak Shammas 10:00 AM
Can you guys please send me the options that we are proposing to the client tomorrow? I want to review our proposals for option 2 and 3 one more time. Had some concerns around the strategy.

5 replies from Franz, Giselle, and Inna

about the buy one get one offer as well? Originally it was slated for
pproved for July. Here is the deck where we last left off. Daniela can speak

Contoso

Search

Recents Deals

Adatum Corporation - Project X
Opportunity size $500K | Probability High
Babak Shammas

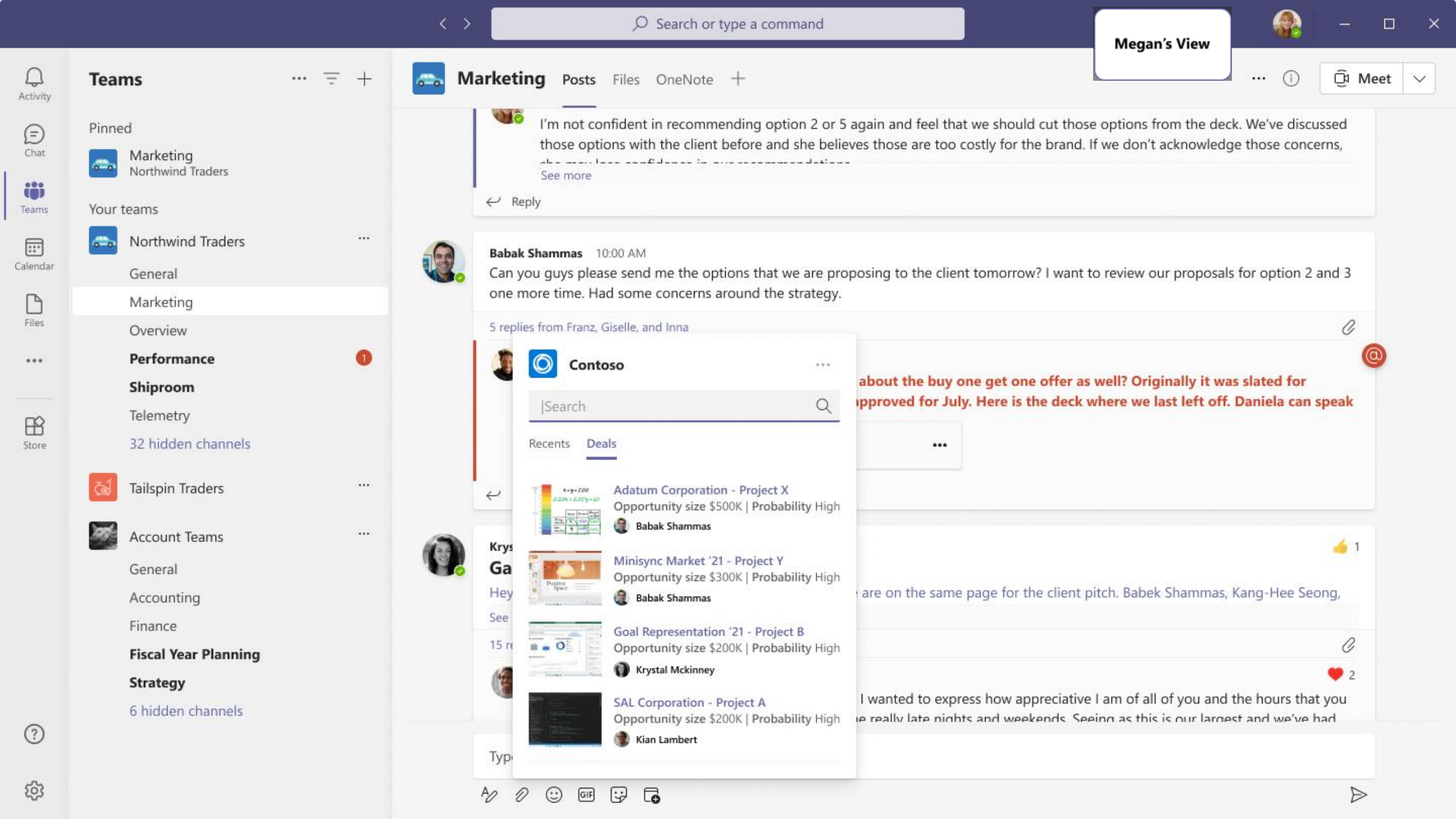
Minisync Market '21 - Project Y
Opportunity size $300K | Probability High
Babak Shammas

1

are on the same page for the client pitch. Babek Shammas, Kang-Hee Seong,

2

I wanted to express how appreciative I am of all of you and the hours that you
e really late nights and weekends. Seeing as this is our largest and we've had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See more
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Contoso
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Deals
Adatum Corporation - Project X
Opportunity size $500K | Probability High
Babak Shammas
Minisync Market '21 - Project Y
Opportunity size $300K | Probability High
Babak Shammas
Goal Representation '21 - Project B
Opportunity size $200K | Probability High
Krystal Mckinney
SAL Corporation - Project A
Opportunity size $200K | Probability High
Kian Lambert
about the buy one get one offer as well? Originally it was slated for
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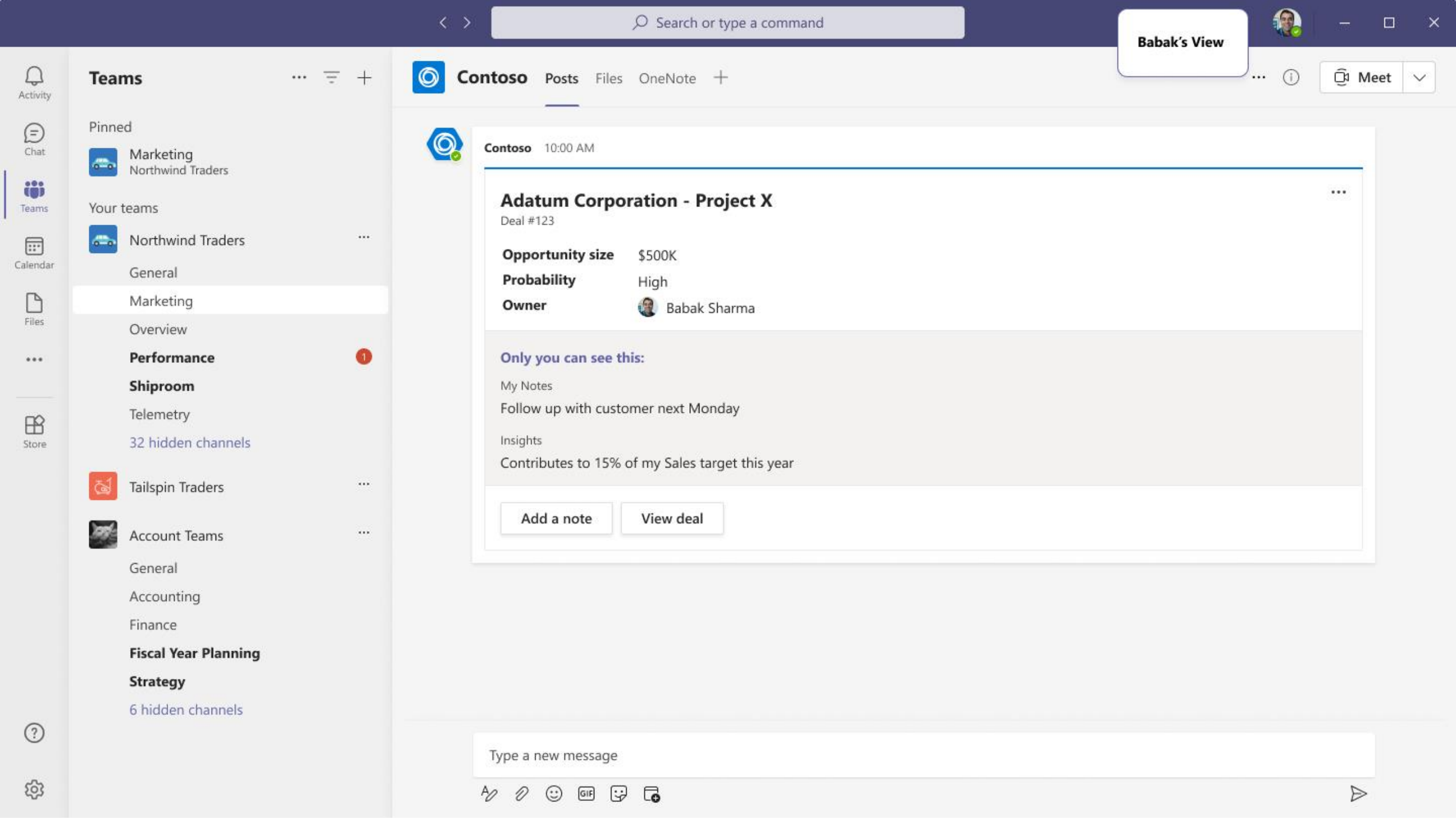
are on the same page for the client pitch. Babek Shammas, Kang-Hee Seong,
1
2
I wanted to express how appreciative I am of all of you and the hours that you

Adaptive cards

Use the same adaptive card to show different content to users with different roles.


Search or type a command
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32 hidden channels
Tailspin Traders
Account Teams
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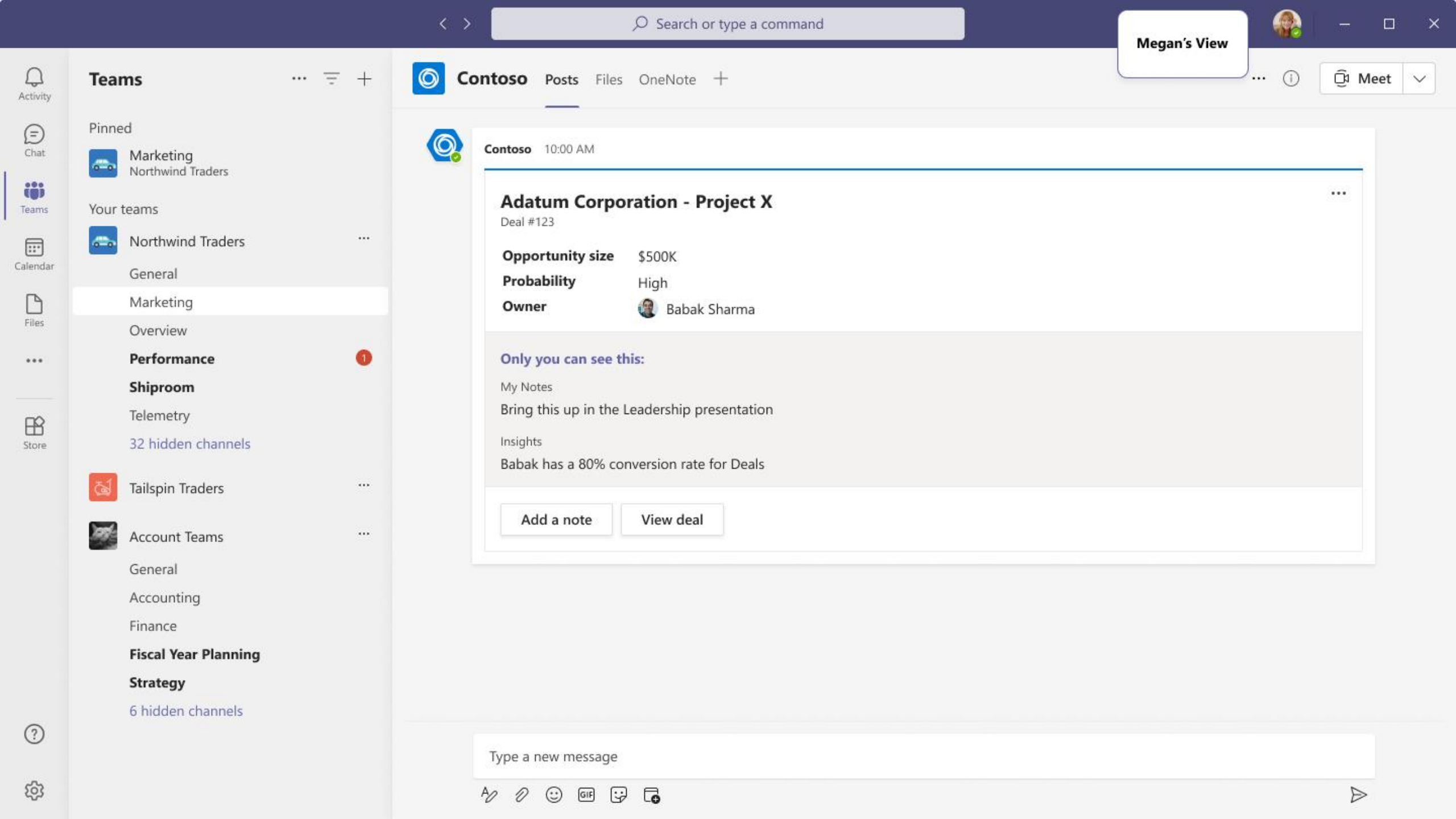
Accounting
Finance
Fiscal Year Planning
Strategy
6 hidden channels
Contoso
Posts
Files
OneNote
Meet
Contoso 10:00 AM
Adatum Corporation - Project X
Deal #123
Opportunity size $500K
Probability High
Owner Babak Sharma
Only you can see this:
My Notes
Follow up with customer next Monday
Insights
Contributes to 15% of my Sales target this year
Add a note
View deal
Type a new message


Search or type a command
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Finance
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Strategy
6 hidden channels
Contoso
Posts
Files
OneNote
Meet
Contoso 10:00 AM
Adatum Corporation - Project X
Deal #123
Opportunity size $500K
Probability High
Owner Babak Sharma
Only you can see this:
My Notes
Bring this up in the Leadership presentation
Insights
Babak has a 80% conversion rate for Deals
Add a note
View deal
Type a new message

Teams Meetings

You can also leverage special roles in a Teams meeting – ‘Attendee’, ‘Presenter’ & ‘Organizer’ to surface relevant content to different user roles.

Learn more about using Roles in a Teams meeting

Contoso

A typical CRM software app

Aadi Kapoor

Role

Customer

Fabrikam Industries

"I want to learn about the different products sold by Fabrikam & purchase the right product for my immediate requirement"

Babak Shammas

Role

Sales Rep

Fabrikam Industries

Reports to Megan Bowen

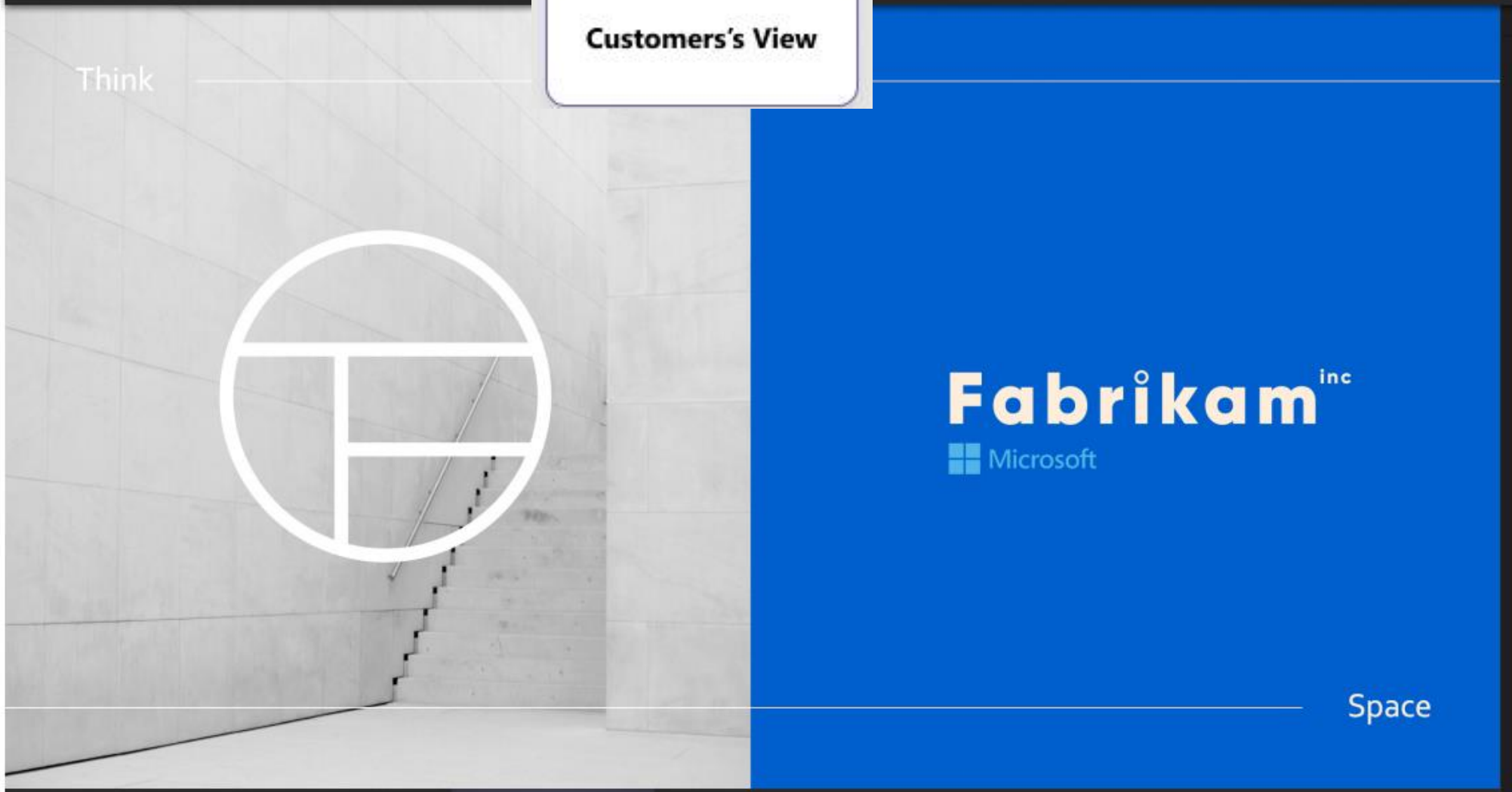
"I work hard to meet my individual sales target. I look to my manager, Megan for her guidance and leadership and strive to become a better sales person"

Marketing Review

00:22:06

Leave

Customers's View



Sales feedback form

First name

Aadi

Last name

Kapoor

Company name

Text

Describe your application

Requirement time frame

- Next 3 months
- Next 6 months
- Undecided

Submit feedback

Beth Davies

Babak S

MJ Price

Beth Davies

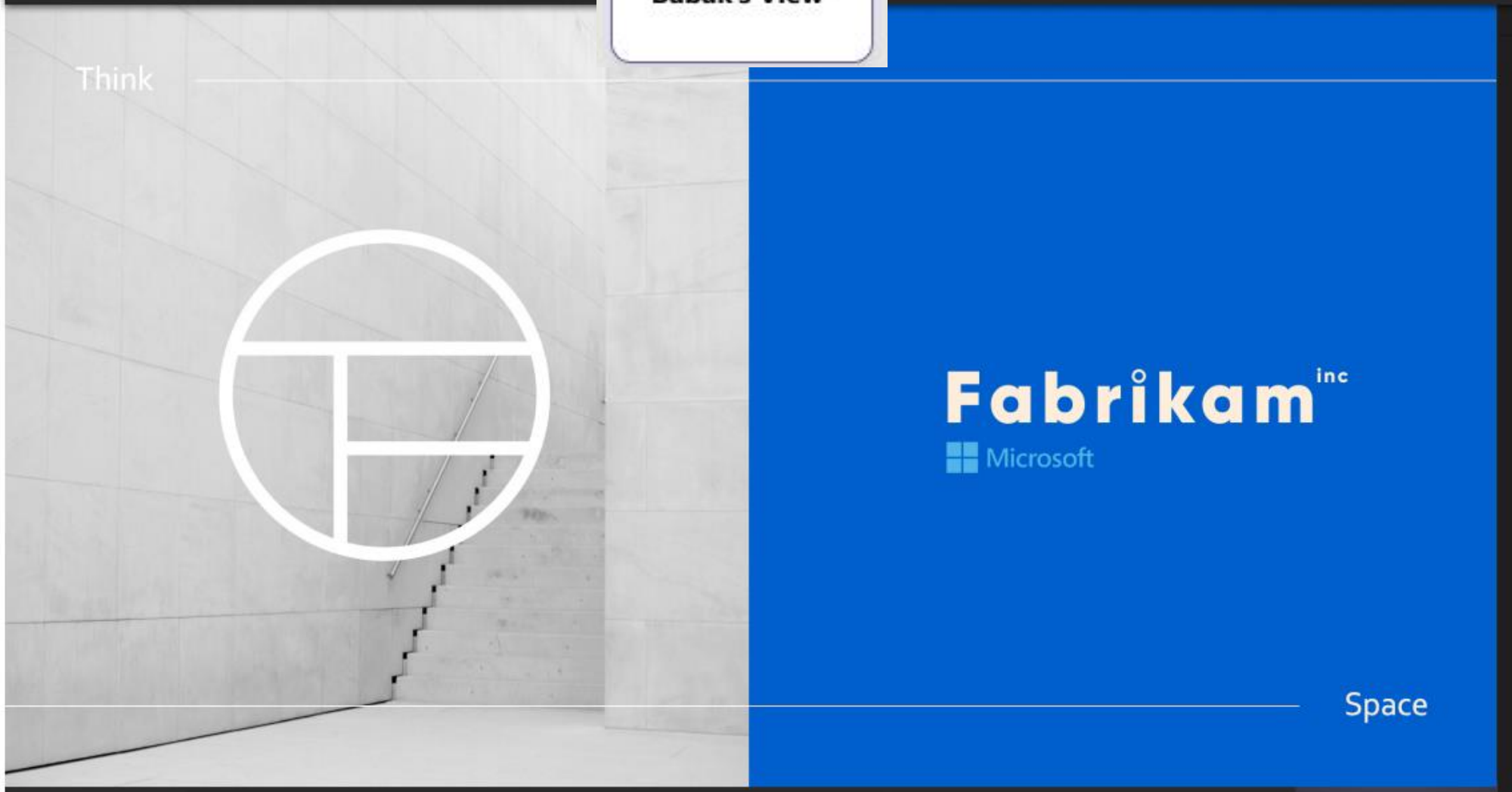
Aadi Kapoor

Marketing Review

00:22:06

Babak's View

Leave



Sales Feedback Result

Closed

Thoughts visible to me

What went well?

8	100%
Responses	Participation

View responses

Closed

Thoughts visible to me

Most requested products

4	3
x335 silver	s665 platinex

View responses

Beth Davies | MJ Price | Beth Davies | Aadi Kapoor | Babak S

Thank You

Microsoft Teams Ecosystem