

### Manage your marketing event with Microsoft Teams

Planning and executing a marketing event is a complex project that requires close coordination between different departments and teams. Successful marketing events are critical to the company brand and image because they are often public-facing events, such as customer appreciation events, new product launches, training seminars, and various conferences. **Teams** provides a chat-based workspace in Office 365 designed to allow team members to move quickly from conversations to content and tasks, with context, continuity, and transparency to the entire team.



This guide will help you organize your team activities as you plan and execute your next marketing event using **Teams**, the chat-based workspace. Some typical team-based activities associated with event planning might include:

- **Marketing**
- **Logistics and Scheduling**
- **Venue**
- **Budget**

Once you've created your **Event Planning team** in **Teams**, you can add a few channels and seed those channels with content so that your team members don't see a blank page the first time they log in. For example, you might **start a new conversation** by posting a few questions or wiki topics in each channel to get a discussion started and @mention specific team members to pull them into the conversation. You can also connect to external content such as an existing third-party task management system (like Wunderlist or Trello), or links to vendor and venue websites, so that all relevant content is available in **Teams**, regardless of whether its source is an internal or external application or service. A few channels for an **Event Planning** team might include:

#### Marketing Channel



This channel can be used to plan activities, such as promoting the event, creating event collateral, planning the timing for marketing communications, and responses to event questions. The **Conversations** tab can be used to help with these tasks by providing up-to-the minute communication between team members. Connectors can be used to add relevant information to the **Conversations** tab, and can also be shared in chat and used to track event mentions. A few helpful tabs for this channel might include:

- Twitter connector (so you can follow specific accounts or hashtags related to your event)
- Facebook connector (so you can track and draft responses to wall posts and private messages)
- Files (Store and collaborate on drafts of marketing collateral or track attendees and sponsors in Excel spreadsheets)

**Tip:** You can also add tabs that link directly to specific files. This may be helpful for files that will be frequently referenced by the team.

### Budget Channel



This channel can be used to track the event budget and actual expenses. Team members can use **Conversations** to post questions about purchase requests for a quick response, and quickly update other team members if cost contingencies emerge. Under **Files**, you can add relevant documents such as:

- Budget templates (to ensure that all budget documents stay consistent and accurate)
- Previous event budgets (for comparison)
- Purchase requests and authorizations
- Approved budget (actual budget document, which can be co-authored)

### Logistics and Scheduling Channel



This channel can be used to ensure that all the various departments and teams stay in sync and on task with the logistics surrounding the event. Some features that may be useful to the **Event Planning team** include:

- A **Planner** tab to track, assign, and manage tasks
- A **Wiki** tab to store and share meeting minutes
- An **Excel** tab showing the setup/teardown schedules

### Venue Channel



This channel can be used to track venue information. You can add relevant information such as:

- Venue Maps, in a **PDF** tab
- Venue Pricing, in the **Files** tab
- Venue contact information, in an **Excel** tab for easy access

**Tip:** Team members can easily access event planning information during the event via the **Teams** and **OneDrive** mobile apps.