

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. **Microsoft Teams** provides a chat-based workspace in Office 365 designed to allow team members to move quickly from chats to content and tasks, with context, continuity, and transparency to the entire team. This guide will help you successfully organize your team activities as you prepare for your next marketing event using **Teams**, the chat-based workspace.



Some typical team-based activities associated with event planning might include:

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

Once your team owner invites you to join the **Event Planning team** in **Teams**, you can log in and familiarize yourself with how it is organized. Your team owner may already have created a few channels, such as the examples below, and added some content. Check under the **Conversations** and **Wiki** tabs to see if there are any discussions that you need to participate in or questions that you need to answer for the team. There may also be connectors to external content such as a third-party task management system (like Wunderlist or Trello), Twitter feeds, or RSS news feeds.

The following examples are channels that your team owner may have created for your team (**Tip:** Use the **General** channel to suggest creating any other channels that may be helpful to the **Event Planning team**):

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 to use in 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 work with 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 use 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.