

# Microsoft Teams Voice – End User Training - Service Definition

## Core Service

Cloud9 Business Services is a leading IT Training and Consultancy business, specialising in telephony, contact centre and collaborative working solutions. We work directly with organisations to support MS 365 migrations, through our user adoption programme, to drive engagement and improve business efficiencies.

With over 20 years experience in the industry we are ideally placed to assist organisations with end user training during Microsoft Teams Voice migration.

Our training service offering is designed to review business requirements and conduct training needs analysis to make recommendations around how to most effectively use Microsoft Teams applications to support voice communications with customers.

Our training courses will help your people feel confident when using Teams Voice. With improved collaborative working and documented processes, productivity and time management will be improved.

We're passionate about training and supporting organisations to be the best they can be. As with every organisation, your people are your biggest asset. So, using our knowledge and expertise we can create and deliver bespoke training packages, to empower your people to feel confident when using technology.

We work with large organisations, SMEs, local businesses, public sector organisations and charities. We work in partnership with you, to create tailored training packages that support your business needs, growth and ambitions.

## Service Description

Training can be delivered in a variety of ways including expert led webinars, interactive online training sessions or in person delivery. The number of attendees is agreed in advance as part of the planning process. Webinars target a larger number of end users, however, interactive online training sessions encourage more engagement from end users typically improving the learning outcomes. Often the technology will govern which format is more appropriate; more complex applications benefit from smaller groups. In person training requires all users to be onsite at the same time and is often governed by meeting room capacity.

Whilst Cloud9 Business Services has a training environment available for our clients, we will request a MS365 user account held on your Microsoft 365 tenant wherever possible. This means that we are representing the organisations environment, policies and permissions, for example access levels, available applications, example Teams and channel structure. This familiarity helps users apply knowledge to their own environment rather than trying to translate generic user interfaces to their own job roles.

## Scope of Work

Cloud9 Business Services will conduct a training needs analysis and agree training requirements with a key contact at your organisation. This may be identified by user requests, IT service desk enquiry analysis or driven by strategic objectives.

Where this information is not readily available, more in depth discovery can take place. Our experienced consultants hold senior leadership meeting to define and agree the overall strategic objectives of the project and agree any required outcomes. We would also seek to understand governance around the technology, such as policies, end user devices, external collaboration guidelines/rules.

Discovery workshops are held directly with end users to understand current working practices, challenges and overall business needs. Users are grouped in a logical way depending on your organisation, typically teams within departments or similar job roles across multiple departments.

In addition, surveys using of MS Forms can be designed and distributed to gather data and group training requirements for bespoke training content.

Once the requirements are understood, our team will create agendas based on the agreed learning objectives. These agendas are available for review prior to training delivery and once confirmed, can be shared to the relevant participants.

We work collaboratively with your organisation to agree a training plan, including proposed dates and sessions to allow your key contact to invite the relevant attendees. By managing internal invitations your organisation is in control of attendance and “owns” the meeting should training be delivered online.

Wherever possible training sessions are designed in bite sized sessions for maximum participation and understanding, aiming for no longer than 1.5 hours per session. We run a minimum of 2 sessions consecutively (AM or PM) if remote or a full day if on site in person. Our experience shows that this works well for organisations, 2 sessions is generally required to ensure job roles are covered whilst other colleagues are attending training.

The recording of online sessions is not only permitted but encouraged, allowing as many users as possible to access the training content. Where agreed in advance, our team will ‘top and tail’ recordings allowing for branding and where appropriate, provides the ability to divide training sessions into logical, shorter, sections.

Training documentation such as quick reference guides can be created at an additional cost, based on time taken to create the relevant materials. In addition, our team can create bespoke training videos pulling out key or more complex features of the Teams Meeting training.

Post training, you will have access to a dedicated contact for a two to three week period, allowing you to ask relevant questions after training has been delivered. After this time, subject to our discretion further training or supporting documentation may be recommended.

## Training Objectives

Our goal in all training sessions is to meet the organisational objectives based on the initial training requirements. The core skills of attending meetings are applicable to the majority of

users, however, we may find certain features are more important in some scenarios than in others, which is why bespoke training is key in upskilling your employees.

Our training sessions allow participants to engage directly with trainers to ask questions around the technology, but also how to apply the technology to their particular role. Wherever possible our trainers will describe features using examples and scenarios relevant to your organisation.

## Course Content

Microsoft 365 provides users with automatic updates delivering updates and additional features in relation to the roadmap. Therefore, as the product is constantly evolving, the course specifications are an example of training agendas and may not be identical to the training delivered. As training is also bespoke, the content may vary dependant on the organisations needs and objectives.

Microsoft Teams Voice training is designed in conjunction with your overall configuration and set up. For example sessions may be targeted to specific user groups based on their attributes such as call queue handler, operator / main number answerer, delegate user or those using Microsofts contact centre features.

As training is also tailored to your organisation, the content may vary dependant on the initial learning objectives.

Courses are regularly updated on our website [ms-365.training](https://ms-365.training) and [ms-teams.training](https://ms-teams.training)

## Assessment Criteria

Success criteria is agreed at the beginning of a training programme, along with the learning objectives. Training feedback is gathered via a feedback form using Microsoft Forms.

Feedback provided at the end of a session is valuable, however, this is more related to the delivery of the session rather than assessing how well learning objectives have been met. Therefore, our team will provide a feedback form designed to distribute to attendees approximately one week after the delivery of the training. We believe that a delay between training and feedback, allows individuals to provide a more effective evaluation not only on what they have learned, but how they have managed to apply this to their job roles.

The feedback is reviewed by our team, together with you, to identify any areas that may need to be followed up, for example, additional supporting documentation, drop-in sessions or additional training sessions.

## What our customers say:

"Really Helpful, thanks"

'Good Tips'

'Great Session'

'Easy to Follow'

'Very Helpful'

End user comments, recent MS Teams Voice training session (anonymous due to partner customer)

## Appendix A – Sample agendas / courses

### Microsoft Teams Voice - generic

Our Teams Voice training course provides attendees with the knowledge to confidently use MS Teams for external calling. Each session covers an overview of the Teams client, how to make and receive calls, call handling options, including hold and transfer, voicemail, contacts, as well as presence and status. Everything you need to get you started on your Microsoft Teams Voice journey. With each of our training courses, we will work with you to tailor the course to your organisation, to ensure we meet your business needs.

A typical course agenda will include the following:

#### *Introduction*

- Business Driver / Strategic vision as to why enabling Teams for voice
- Introduction to unified communications and benefits the solution can enable over traditional telephony / voice over IP (VoIP) solutions

#### *Overview of Teams*

- Understanding of the Teams window and how to navigate the interface
- High level overview of relevant modules

#### *Presence / Status*

- Understanding presence and how to manage
- How to set status and manage calendar entries
- Impact of calendar and presence status on call handling

#### *Device Management*

- Managing audio devices

#### *Inbound and Outbound calls*

- Overview of the Calls module
- Searching and calling a Teams contact (internal & external)
- Dialling out, including number presentation
- Ending a call
- Answering an incoming call
- Understanding the difference between direct dial and call queue calls (where applicable)

#### *Call Handling*

- Learn call handling features such as hold, mute, touch tone
- Transfer calls via chat, audio or external number, using announced or unannounced transfer
- Enabling call recording and transcription (if applicable)
- Adding colleagues and contacts to an inbound or outbound call
- Using the live caption feature

- Moving from calls from one device to another (where applicable)

#### *Managing Voicemail*

- Accessing voicemails via Teams
- Listening to voicemails via Outlook
- Managing voicemail greeting and out of office

#### *Call Settings*

- Understand the routing concept of unified communications
- Managing unanswered calls, including re-routing to colleagues, groups of colleagues and external numbers
- Enabling call forwarding
- Working with delegates (where applicable)
- Managing contacts, including groups and speed dials

*Duration* - 1 hour session, plus 15 minute Q&A