How to get started with Teams
Guide for IT administrators in higher education institutions
Get started with Teams in 3 simple steps

1. Identify where you are in your digital transformation journey

2. See what actions you need to take for the stage you’re in

3. Learn how to get going with Teams

Optional first steps for your leadership team:
Craft your vision using the Education Transformation Framework (ETF) and assess your current state using the Customer Assessment Tool.
Where are you in your digital transformation journey?

**CHANGE MANAGEMENT**
- Not familiar with the process and/or no plan in place
- Early adopters are identified, engaged, and trained
- Usage scenarios are defined, KPIs are captured, and training and awareness programs are in place

**SECURITY**
- On-premises only with no identity, access, or device management
- On-premises or hybrid architecture with basic identity, device, and access management
- Cloud-based architecture with enhanced protection for identities, devices, information, and compliance

**TEAMS**
- Not yet deployed
- Deployed but not widely adopted
- Widely adopted and users want advanced functionality

**ENTRY**
**EMERGING**
**ADVANCED / TRANSFORMATIVE**
Simple steps for the stage you’re in

ENTRY

1. Start planning
2. Protect identities
3. Get going on Teams

EMERGING

1. Gather feedback
2. Protect devices & information
3. Expand feature use

ADVANCED / TRANSFORMATIVE

1. Evaluate and scale
2. Enable advanced security
3. Add advanced functionality

< Start
Your action steps

1. Start planning | Set expectations and begin adoption planning
2. Protect identities | Protect against credential theft and password, email and URL hacking
3. Get going on Teams | Turn Teams on; set up chat, channels, and classes; and train faculty on the basics

MANAGE CHANGE

ENABLE SECURITY

USE TEAMS
Your action steps

1. **Gather feedback** | Identify champions and early adopters, share success stories and gather feedback

2. **Protect devices and information** | Enable device protection and secure file sharing/collaboration

3. **Expand feature use** | Further educate key user groups on how to use Teams features and functions
Your action steps

1. **Evaluate and scale** | Use what you’ve learned to roll out Teams across your institution

2. **Enable advanced security** | Get advanced protection for identities, devices, information and compliance

3. **Add advanced functionality** | Use advanced Teams functionality, and develop custom Teams solutions
Get going at each stage

ENTRY

EMERGING

ADVANCED / TRANSFORMATIVE

Find out how >

Find out how >

Find out how >
Get started quickly and easily

**MANAGE CHANGE**

1. **Start planning**
   - Set expectations and begin adoption planning

   *Start the change management process* by assessing organizational readiness and identifying early adopters
   - Assess organizational readiness and identify key stakeholders/early adopters
   - Create teams & channels for early adopters
   - Change management for Teams overview

   *Share at-a-glance webinars* with your faculty and academic teams
   - Set up online lectures and classes with students
   - Set up ad hoc meetings with students
   - How instructors and students can use Teams for course management and collaboration

**ENABLE SECURITY**

2. **Protect identities**
   - Protect against credential theft and password, email and URL hacking

   *Set up identities in the cloud*, sync existing identity solutions, and establish single sign-on for each user
   - Entry level: M365 deployment overview
   - Understand: Identity models
   - David’s Identity Cheat Sheet (placeholder)

   **Recommended products**
   - **Identity**: Azure Active Directory Basic
   - **Information**: Office 365 ATP

**USE TEAMS**

3. **Get going on Teams**
   - Turn Teams on; set up chat, channels, and classes; and train faculty on the basics

   *Deploy Teams*
   - Enable Microsoft Teams
   - How to Roll Out Microsoft Teams
   - Quick start – Microsoft Teams for Education admins
   - Fast deployment for remote learning
   - EDU Office 365 deployment decision guide

   *Set up governance*
   - Complete the governance quick start
   - Microsoft Education governance for Teams
   - Protect users from inappropriate communication

   *Create class teams* quickly using School Data Sync
   - School Data Sync deployment overview
   - School Data Sync performance examples

   *Set up chat and channels*
   - Chat, teams, and channels in Microsoft Teams (for IT)

   *Get faculty up and running*
   - Set up chat, teams, and channels (for faculty)
   - Use Teams for classes and lectures (for faculty)

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**Recommended plan: Microsoft 365 Education A1**
Engage early adopters, increase security, expand feature use

**MANAGE CHANGE**

1. **Gather feedback**
   - Identify champions and early adopters, share success stories, and gather feedback
   - Create your champions program
   - Define usage scenarios
   - Identify stakeholder and early adopter needs
   - Map and prioritize scenarios
   - Onboard early adopters and gather feedback

2. **Enable security**
   - Ensure protection for devices, protect against unauthorized data access or leakage and enable secure file sharing/collaboration
   - Emerging level: M365 deployment overview
   - Getting started with Intune for Education
   - Azure Information Protection Deployment Acceleration Guide
   - What is Azure Active Directory?

   **Recommended products**
   - **Identity:** Azure Active Directory P1
   - **Devices:** Intune (MDM and MAM)
   - **Information protection:** Azure Information Protection P1

3. **Use Teams**
   - Show key user groups how they can use Teams for better learning and collaboration
     - **Faculty:**
       - Faculty collaboration
       - Combine Teams with your learning management system
     - **Researchers:**
       - Researcher collaboration
     - **Staff:**
       - Staff collaboration
     - **Students:**
       - Student collaboration
       - Student Life with Microsoft Teams

   **Expand your Teams features/functions**
   - Begin to customize Teams using apps such as Planner, available in the Teams University Store

**Recommended plan:** Microsoft 365 Education A3

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Watch success stories from your colleagues
- University of Central Lancashire
- Dr. Michael Johnson, UW
- Blackpool & The Fylde college

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Emerging level: M365 deployment overview
Getting started with Intune for Education
Azure Information Protection Deployment Acceleration Guide
What is Azure Active Directory?

**Identity:** Azure Active Directory P1
**Devices:** Intune (MDM and MAM)
**Information protection:** Azure Information Protection P1

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Recommended plan: Microsoft 365 Education A3
Implement advanced security and functionality and roll out Teams across your organization

**MANAGE CHANGE**

1. **Evaluate and scale**
   Use what you’ve learned to roll out Teams across your institution
   - Refine your change management process based on prior learnings and drive awareness and training of Teams across your institution
   - Define outcomes and success measures
   - Select a service enablement strategy
   - Engage additional stakeholders
   - Expand governance and implementation policies
   - Optimize feedback and reporting
   - Drive awareness and implement training using Teams printable and digital resources such as posters, flyers, email templates, etc.

2. **Enable advanced security**
   Get advanced protection for identities, devices, information and compliance
   - Get advanced protection against unacceptable access or insider threats, cyber threats to endpoints, and anomalous use against policies/shadow IT
     - Advanced M365 deployment overview
     - David’s Identity Cheat Sheet (placeholder)
   - Recommended products:
     - Identity: Azure Active Directory P2-Privileged Identity
     - Management: Azure Advanced Threat Protection
     - Devices: Windows Defender ATP
     - Apps/Information: Microsoft Cloud App Security
   - Manage your compliance needs by protecting against unauthorized access or sharing of classified content and unauthorized content searches
     - Transformativ M365 deployment overview
   - Recommended products:
     - Information protection: Office DLP, Azure Information Protection P2, Microsoft Cloud App Security
     - Compliance: Office 365 Advanced Compliance, Lock Box

3. **USE TEAMS**

   - See how one university is using advanced Teams functionality to further accelerate remote teaching/learning
     - University of New South Wales Sydney
   - Do more with Teams by pulling in apps you already have, as well as creating new ones
     - Five things to know about apps in Teams
     - Add an app to Teams
     - Apps, bots & connectors in Teams
     - Build your own apps quickly and easily with Microsoft Power Apps
     - Learn how you can use the Microsoft Power Platform, including Power BI, to build new learning solutions
   - Work with partners to develop custom solutions using Teams
     - Apps and content from Microsoft Partners
   - Gain insights into how you’re using Teams
     - Microsoft Teams analytics and reporting

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**Recommended plan:** Microsoft 365 Education A5
Additional resources

→ Ready to get started using Teams?
The Get started with Microsoft Teams for remote learning guide is a great place to start.

→ Want to find out how different user groups are using Teams as a hub for collaboration?
Check out Microsoft Teams University.

→ Need help with deployment and onboarding?
We’re here to help every step of the way with FastTrack.

→ Trying to decide which Microsoft 365 Education plan is right for you?
Visit Microsoft 365 Education and scroll to “Compare Microsoft 365 Education Plans” at the bottom of the page.