

## Collaborating Effectively in Microsoft 365

### OVERVIEW

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The **Collaborating Effectively in Microsoft 365** course focuses on improving how teams communicate, share information, and work together using Microsoft 365 tools.

Designed for users already familiar with core applications, this course moves beyond individual productivity and explores how Microsoft Teams, OneDrive, SharePoint, Microsoft Planner and Office applications work together to support effective team collaboration.

Participants will learn how to reduce reliance on email, collaborate on documents in real time, improve visibility of work, and adopt consistent approaches to communication and file sharing. Emphasis is placed on practical, team-based workflows that enable more efficient and connected ways of working.

### LEARNING OUTCOMES

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By the end of the course, participants will be able to:

- Understand how Microsoft 365 tools support team collaboration
- Use Microsoft Teams effectively for communication and teamwork
- Choose appropriate communication methods (Teams vs Outlook)
- Share and collaborate on files using OneDrive and SharePoint
- Co-author documents in Word and Excel in real time
- Reduce duplication and manage document versions effectively
- Use Microsoft Planner to support team task visibility and accountability
- Work more transparently and consistently within teams
- Apply best practices for communication, file management, and collaboration

These outcomes support more effective teamwork, improved communication, and clearer visibility of work across the organisation.

### DURATION & DELIVERY

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The duration of this course is typically **3–4 hours or 1 day**, depending on the level of depth and practical exercises included.

This course can be delivered in a range of formats to suit your team:

- **Onsite training** - delivered at your workplace
- **Live online training** - delivered virtually in real time
- **Hybrid delivery** - a combination of onsite and online participants for teams working across multiple locations

All training is delivered by experienced Microsoft 365 specialists with a focus on practical, real-world application.

## PREREQUISITES

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Participants should have a basic understanding of Microsoft 365 applications, including email, file management, and general navigation within the Microsoft 365 environment.

## COURSEWARE

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Learning materials are available for purchase at the time of booking. These may include training materials, reference guides or supporting resources, depending on the course.

While Microsoft 365 continues to evolve, the core principles of collaboration, communication, and file management remain consistent. Where new features or updates are relevant, trainers will incorporate these into the session to ensure participants receive practical, up-to-date guidance aligned with current Microsoft 365 capabilities.

## MICROSOFT 365: MODERN WORKPLACE TRAINING PATHWAY

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Our Microsoft 365 Modern Workplace training is designed to help individuals and teams work more efficiently, collaborate effectively, and get better value from the tools they use every day.

All courses can be delivered as outlined below, or we can customise a training program to ensure your team completes the exact topics they need in the timeframe that best suits your organisation.

### MODERN WORKPLACE COURSES

- **Getting Started in Microsoft 365** – Build confidence using the core Microsoft 365 applications, including Outlook, OneDrive, Word, Excel, OneNote, and Teams. Ideal for new users or those requiring a strong foundation.
- **Working Smarter with Microsoft 365** – Improve personal productivity by managing email, organising work, structuring files, and building efficient daily workflows across Microsoft 365 applications.
- **Collaborating Effectively in Microsoft 365** – Transform how teams work together using Microsoft Teams, shared files, and real-time collaboration tools, with a focus on reducing reliance on email.
- **Managing Files & Information in Microsoft 365** – Learn how to organise, store, and manage documents across OneDrive and SharePoint to reduce duplication and improve accessibility.
- **Modern Work Habits with Microsoft 365** – Develop better ways of working by improving communication practices, managing meetings effectively, and using the right tools for the right tasks.
- **Managing Tasks & Work in Microsoft 365** – Use Microsoft Planner as a central tool to assign, track, and manage work across teams, improving accountability and visibility.
- **Using Copilot in Microsoft 365** – Leverage AI capabilities to enhance productivity across Microsoft 365 applications, including drafting content, summarising information, and analysing data.

## COURSE DETAIL

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### Understanding Collaboration in Microsoft 365

- Overview of collaboration tools within Microsoft 365
- How Teams, SharePoint, OneDrive, and Planner work together
- Common collaboration challenges and inefficiencies
- Moving from email-based work to shared environments

### Working in Microsoft Teams

- Understanding teams, channels, and conversations
- Using chat vs channel conversations
- Communicating effectively within Teams
- Managing notifications and staying informed
- Sharing and accessing files within Teams

### Choosing the Right Communication Tool

- When to use Teams vs Outlook
- Managing communication across multiple channels
- Reducing unnecessary email
- Establishing consistent communication practices

### Collaborating on Documents

- Sharing files using links rather than attachments
- Co-authoring documents in Word and Excel
- Working on files at the same time
- Understanding document versions and changes
- Avoiding duplicate files

### Managing Team Files (OneDrive & SharePoint)

- Understanding personal vs shared storage
- Accessing files across Teams, OneDrive, and SharePoint
- Organising team files effectively
- Ensuring accessibility and consistency

### Managing Team Tasks with Microsoft Planner

- Understanding the role of Planner in team collaboration
- Creating plans and organising work with buckets
- Assigning tasks to team members
- Tracking progress and deadlines
- Using Planner within Microsoft Teams
- Improving visibility and accountability of work

### Improving Team Collaboration Practices

- Establishing shared ways of working
- Improving transparency and access to information
- Reducing duplication and confusion
- Supporting more efficient team workflows