Sales

This book contains an adoption toolkit, email templates, use cases, banners, a poster, and a flyer.
How to use this toolkit

For best user experience and navigation please view this file using Adobe Acrobat. Available free for download here.

So you’re deploying Webex Teams in your company? We’d like to make it easy.

In this book, you can find

- Documents to help you make a successful Webex Teams adoption plan.
- Best practices for using Webex Teams.
- Documents made to inspire knowledge workers to use Webex Teams in their lines of business.

At the bottom of each document, find a download link to access each individual file to share as you need.

Made for you

If you want to customize the files for use in your company, no problem. At the end of each section, find a link to all editable file types. Make changes as you please.

To leave feedback or to request more of this content, click:

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Want more?

Unlock your productivity by joining Cisco Webex Quick Classes. You’ll learn best practices and top tips through live, interactive product demonstrations.

Get on-the-spot answers to your questions from a Cisco expert. Learn more and register at cisco.com/go/quickclass

Join the Cisco Collaboration community, where you can ask questions, find all of the great content discussed in this playbook, and more.

Questions/comments? Join the Webex Adoption space or email WebexAdoption@cisco.com
So, you want to launch Webex Teams in sales

Use this checklist and guide to get support from your leaders, create awareness, and stimulate demand. Your time is precious so you don’t have to do everything, just what you have time for that makes the biggest impact. You don’t have to do everything at once and ask your colleagues to help you. Phase it out over several weeks, and the more time you devote, the more people will use Webex Teams.
Sales teams are changing

Sales is a team effort. Stay competitive and up your game by breaking down communication barriers.

52% of sellers believe collaborative selling has increased pipeline activity by up to 25%.*

73% of sellers say cross-department collaboration is ‘critical’ or ‘very important’ to sealing the deal.*

Want better business customer relationships?
Make your next pitch in flawless HD video.

Would access to experts help you seal the deal?
Put experts in your field’s pocket with screen sharing and whiteboarding on mobile.

Need to close business faster at quarter end?
Share deal information in real time with messaging, meeting and calling on the fly.

*Source: Second annual state of sales report
<table>
<thead>
<tr>
<th>What?</th>
<th>How?</th>
<th>Effort</th>
</tr>
</thead>
<tbody>
<tr>
<td>Has everyone got Cisco Webex Teams?</td>
<td>Ask your IT team to confirm everyone has a Webex Teams account. Find out how new joiners get a Webex Teams account and instructions on how to log in.</td>
<td>1 hour</td>
</tr>
<tr>
<td>Enlist the support of senior leaders.</td>
<td>Write to senior leaders asking them if they can send an email to everyone announcing the launch of Webex Teams. We’ve written an example to help you. Attach one or more of the use cases in this section that explains why it’s so useful.</td>
<td>30 mins</td>
</tr>
<tr>
<td>Need some guidance with Webex Teams?</td>
<td>Need help getting started? Use the <a href="#">best practices</a> section of the playbook to get all the information you need. You can also use the <a href="#">Collaboration Help Portal</a> to find more information, and there’s lots of step-by-step guides for you to use too.</td>
<td>10 mins</td>
</tr>
<tr>
<td>Cook up a simple timing plan.</td>
<td>Get some of your colleagues together and come up with a communications plan that describes when each promotion will go out and who does what. <a href="#">See Communications Planning for guidance.</a></td>
<td>1 hour</td>
</tr>
<tr>
<td>Share a snappy tagline using a banner ad – Make Webex Teams appeal to your departments.</td>
<td>Within the playbook, you will find posters and banners which target several departments. Find a space on your intranet to place a banner e.g. the HR section. You can also use it in emails and PowerPoint. Change the tagline to suit your organization’s personality and link it to a ‘how-to’ guide.</td>
<td>2 hours</td>
</tr>
<tr>
<td>Show you care. Print a poster or flyer.</td>
<td>Print the poster or flyer. Put the poster up in the office, the restroom, meeting rooms and the flyers on colleagues’ desk. If you’ve got digital signage in your buildings use that as well.</td>
<td>4 hours</td>
</tr>
<tr>
<td>Circulate the sales ‘use cases’.</td>
<td>We’ve written three compelling use cases that show you how Webex Teams solves your everyday challenges. Share them with all of your colleagues, you can email, print and showcase them on your intranet.</td>
<td>10 mins</td>
</tr>
<tr>
<td>Write an email for your senior leader to send to the whole team.</td>
<td>We’ve written an example. Just adapt it for your own culture and organization’s personality.</td>
<td>30 mins</td>
</tr>
<tr>
<td>Set up your team with a space in Webex Teams.</td>
<td>Create a space in Webex Teams but make sure you add a description for what the space is to be used for. Give it a purpose, set the tone so everyone knows why they are there. Start your conversation today.</td>
<td>30 mins</td>
</tr>
</tbody>
</table>
To senior leaders in sales

Subject line:
Why we need to embrace Cisco Webex Teams in sales.
Can you help me promote it?

We’ve all been given Webex Teams, for continuous teamwork with video meetings, group messaging, file sharing and whiteboarding. We want to get as many of our people using it as possible. Webex Teams has some amazing features we can use to sell faster as a more connected team. I’ve attached a couple of examples.

We’re writing a launch plan and it would make all the difference if you could send an email that encourages everyone in sales to use Webex Teams. When we’re ready we’ll send you a draft copy for approval.

Thank you.
From senior leaders to everyone in sales

Subject line:
Working better together with Cisco Webex Teams.

Webex Teams is a simple modern video meeting solution for global workforces. Our investment in Webex Teams is motivated by the need to improve the way we cultivate and nurture customer relationships and our work-life balance.

We can use it to save time, delight customers and reduce travel.

To get started and get support click here <insert links>.

Looking forward to seeing sales leading on new ways of working with Webex Teams.

Thank you.

[EMAIL SIGNATURE]
Cisco Webex Teams promotion assets - sales

Build relationships and seal deals with Webex Teams.

Cisco Webex Teams

Download poster

Download MPU

Download banner

Download skyscraper
Hey sales!

Time is money
You’ve been there. It’s quarter end. Your customer needs more details before they sign. That means you need answers, now. Use Cisco Webex Teams with your team to meet your deadline. Here’s how:

Call on the fly
You can see when the expert reads your message. They can review the history in the deal space. With one touch, you can video call them to get assistance in real-time.

Ask the expert
Awesome pitch! But now your customer has more questions. From your mobile device, add the expert who will know the answers. Ask questions right in your deal space and @Mention the expert. No need to schedule a follow up. Keep the deal going.

Connect your team
Download the Cisco Webex Teams app. Get everyone in a space, together. Create a team with spaces for different deals or topics. You’re all set to collaborate on a great proposal for your customer.

Download Cisco Webex Teams
Create a team
Create spaces

Follow up
After the call, that expert can create a space with your customer to share supporting documentation. Your customer is assured that the expert will be available to help until the deal is signed. Success!

Add external participants

Love this?

Access your teams in real-time.
Communicate better.
Close deals faster.

Download use case
Hello sales!

Have a direct line with every client

Your relationships with customers can only be as good as your communication tool allows. Customers need to be able to reach you at any time and you need to keep a pulse on how they’re feeling. Cisco Webex Teams lets you chat and meet flexibly, frequently, and informally from wherever you are.

1 on 1 spaces

Download the Cisco Webex Teams app. External customers can use all Cisco Webex Teams features too. Use one persistent space for just you and your customer as your communication central. You can always reference their past messages and priorities.

Share documents

Share key deal documents. Store large files securely for later reference. Give your customer all the information they need to move the deal forward.

Plan your meeting

With one button, easily schedule a 1 on 1 catchup. The meeting will appear on both of your calendars. Webex Teams will remind you when you’re meeting. Their questions are documented close by when you meet. Never have a conversation without context.

Ditch the formality

Tear down communication barriers. Your customer can reach you however is best for them. Send a quick ping. Easily switch between chatting and meeting. See their facial reactions. Answer questions on any device, at any time.

Communicate better.

Build closer relationships.
Hey sales!

Commit or upside?
Forecasting is a team effort. It’s more than just predicting numbers. It’s discussing opportunities, planning steps to close and discussing how confident your team feels about hitting their number.

Cisco Webex Teams brings your numbers and conversations together. Now you have one place for your team to message, meet and share files on the go. Take the stress out of forecasting with a more connected team.

Be accountable
Once you have received your quota, share it in the space and have your team flag it. This makes it easy to track progress as you go.

Flag messages and files

Real-time forecasting
Create a space to provide deal updates. Not only do you get real-time updates on the fly about deals in upside or commit - but your team can share in the excitement and celebrate those closes with GIF’s and emoji’s!

Create a space

Team weekly
Face to face meetings are hard when you’re on the road constantly. Click to add a live meeting to any team space. Now you can have a live discussion and hit your quota!

Schedule a meeting

Best practice sharing
Great sales teams learn from each other. After team calls, have everyone share their best customer presentations, demo’s and objection handling tips to your team space.

Share files

Forecast faster by connecting your team on the go.

✅ See deal confidence in real-time.
✅ Real time deal updates.
✅ Easy mobile presentation sharing.

Love this?
Cisco Webex Teams

Hey sales!
Get started with Webex Teams today

STEP 01
Make your presence felt.
You’re on Webex Teams. What now?
First, upload your profile picture because people are more likely to connect and respond when they can see it’s you.
A. Click on your profile image with your initials.
B. Click inside the large profile image holder.
C. Browse for the picture you want to use and upload.
D. Click off the screen to save your changes.

STEP 02
Connect with co-workers.
Start a 1 on 1 space when you need to reach your team member. Exchange ideas quickly. All your conversations and documents will be saved in the space for later reference. Unlike email, there’s a visual indication of who has seen a message.
A. Click the plus icon at the top of the screen.
B. Click Contact a Person.
C. Type the person’s name.
D. Hover over their profile picture.
E. Choose to Message or Call them.

STEP 03
Start conversations.
When sending a message in a space, use the rich text editor to write longer, formatted messages with attached files. There’s also a neat way of taking screenshots that are automatically placed into the message stream.

STEP 04
Meet your co-worker in seconds.
Many instant messages are a prelude to a real-time call. In a video call, you can communicate more in five minutes than you can in hours via email. It takes two clicks.
A. Click the space activity button top right in the app window.
B. Click the Call button to be connected.

STEP 05
Manage notifications.
You’ll already be in a few spaces. Some of these will be very active. Control alerts and notifications to minimize interruptions and see the content you want. Here’s how.
A. In any space, click the icon at the top left in the spaces screen.
B. Click Notifications.
C. Choose how you want to be notified from the pop-up window.
D. Click Save.

STEP 06
Create spaces and teams.
Create your own teams and spaces to share ideas, best practices and collaborate to achieve common goals and outcomes.

STEP 07
Flag content.
See a message, file or image you want to come back to because you’re too busy? Flag it and view your flagged list by clicking into the search bar.

STEP 08
Find content.
Search for anything and filter by files, people, spaces and messages to narrow the results.

STEP 09
Start meetings.
Use Webex Teams to create and join online meetings. Get notifications of upcoming meetings and join with one click. Send messages and share content to everyone during the meeting. Recorded meetings are automatically shared in your space, after.

Cisco Webex Teams brings everyone and everything together in one simple-to-use, secure space. Moving work forward has never been easier.

Moving work forward has never been easier.

Work how you do, but faster.
Time is money.
It’s quarter end. Your customer needs more details before they sign. Use Cisco Webex Teams on the road to tap into your team’s knowledge and get the deal signed.

Have a direct line with every client.
Use Webex Teams to nurture your customer relationships. Keep your conversation alive and more dynamic than ever before.

Commit or upset?
Forecasting is a team effort. Use Webex Teams to prepare your forecasts faster reducing the stress and creating a more connected team.

Commit or upside?
Forecasting is a team effort. Use Webex Teams to prepare your forecasts faster reducing the stress and creating a more connected team.

Cisco Webex Teams

Sales flyer
Going the extra mile

More questions about driving adoption of Webex Teams?
Join our “Ask Webex Adoption” space in Webex Teams to post your questions or thoughts. Or, email WebexAdoption@cisco.com for more help.

How can we help?
Our Collaboration Help Portal is where you will find quick help guides, step-by-step instructions and technical information. Use the search bar to find everything you need about Webex Teams.

Want to put your stamp on it?
Would you like to rebrand or edit the content we’ve assembled here.
Click here to download a .zip of source files to share with your designers.
Let’s get your team working better together.

All the action in Webex Teams takes place in your spaces. Each space has an activity menu drop-down arrow, with everything you need.

**Message**
Send secure, instant messages to all the people in a space, or a 1 on 1 space. Easily add screen captures, emojis, and @Mentions to grab attention.

**Call/Meet**
In a 1 on 1 space, make direct voice and video calls to talk anytime. In a space with 3 or more people ‘Call’ becomes ‘Meet’ for starting video meetings on the fly. All members see when a meeting has started and can choose to join or not.

**Schedule**
Create and schedule meetings for everyone in the space. This opens a calendar invitation to check team availability and then send. Don’t worry – meeting details are automatically added.

**Whiteboard**
Capture your ideas on virtual whiteboards. Your team can continue to edit the whiteboards independently as they’re saved in the space for easy reference.

**Files**
Files, photos, videos, and whiteboard images that have been shared will be saved in the space too. Use this activity for easy access.

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**Top tips**
First, send a message to let people know why you’re about to meet, so that they can decide if they need to join.

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**Top tips**
You can see the list of members and bots within a space at the bottom left and can access space settings at the bottom right.
Teams and spaces, the basic building blocks of Cisco Webex Teams

What is a space?
A space is a virtual place for a group of people to work together. Spaces are named by the people who create them. 1 on 1 spaces are named after the person you’re in the space with.

Spaces can exist as standalone, or as part of a team. If your standalone space outgrows its original purpose, you can easily move the space into a team. Learn how to move spaces into a team here.

What is a team?
A team is a virtual place for a group of people who will work together for a longer period of time or on a variety of projects. Each team has a space automatically added, called ‘general’, that all team members belong to. Teams are different from spaces, because they can have many different spaces in them. Members can choose which spaces within a team they need to join, so they’re focused only on spaces that are relevant to them.

Teams are typically named after the project or business function they represent. Spaces are named after the various topics, sub-projects or workstreams.

Here are some examples:

<table>
<thead>
<tr>
<th>Team</th>
<th>Spaces</th>
</tr>
</thead>
<tbody>
<tr>
<td>Steve's Direct Team</td>
<td>General, Team budget, Activities, Weekly meeting, Celebrations, Time management</td>
</tr>
<tr>
<td>Project X</td>
<td>General, Planning, Feedback, Fresh ideas, Copy writing, Visual design, Deliverables</td>
</tr>
<tr>
<td>Global IT Organization</td>
<td>General, Telecommunications, Information systems, Computing support, Technical services, Information security, IT procurement</td>
</tr>
</tbody>
</table>
### Spaces vs Teams

Here’s a handy guide on when to use a team vs a space.

<table>
<thead>
<tr>
<th></th>
<th>Typical activity</th>
<th>Typical duration</th>
<th>How to retire</th>
<th>Relationship</th>
<th>Do you need to control access?</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Space</strong></td>
<td>Focused and specific.</td>
<td>Short to mid-term.</td>
<td>If everyone chooses to leave the space, it is deleted.</td>
<td>A space may be standalone or within a team.</td>
<td>By default all members can invite others and change space settings. Moderation can be switched on to control membership and settings. Learn how.</td>
</tr>
<tr>
<td><strong>Team</strong></td>
<td>Distributed and diverse.</td>
<td>Mid to long-term.</td>
<td>Space moderators can archive teams, but not delete. Learn how.</td>
<td>A team has a permanent space named ‘general’ and any number of additional spaces added by members.</td>
<td>The team creator is automatically made a moderator. Any team member can create a team space. Moderators control membership, assigning others as moderators and controlling team settings. Learn how.</td>
</tr>
</tbody>
</table>
# User roles

Here’s a handy guide on roles in teams and spaces.

<table>
<thead>
<tr>
<th>Role: Moderator</th>
<th>Role: Member</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Space</strong></td>
<td></td>
</tr>
<tr>
<td>In a moderated space, moderators can:</td>
<td>When a space is not moderated, all members have the same privileges. They can add and remove members and change the space settings.</td>
</tr>
<tr>
<td>▪ Add or remove members</td>
<td>When a space is moderated, standard members do not have these privileges.</td>
</tr>
<tr>
<td>▪ Edit space information</td>
<td></td>
</tr>
<tr>
<td>▪ Make other members moderators</td>
<td></td>
</tr>
<tr>
<td>▪ Delete other members’ messages</td>
<td></td>
</tr>
<tr>
<td><strong>Team</strong></td>
<td>In a team, members are:</td>
</tr>
<tr>
<td>Team creators are automatically moderators. They can:</td>
<td>▪ Automatically added to the team space named ‘general’.</td>
</tr>
<tr>
<td>▪ Add and remove spaces</td>
<td>▪ Can view and join other spaces in a team.</td>
</tr>
<tr>
<td>▪ Add and remove members</td>
<td>▪ Can add new people as guests to unmoderated spaces in a team, but not to the team.</td>
</tr>
<tr>
<td>▪ Edit team information</td>
<td></td>
</tr>
<tr>
<td>▪ Make other members moderators</td>
<td></td>
</tr>
</tbody>
</table>
Webex Teams makes it easy to work with anyone - both internal teammates and external vendors, customers, or partners. You can invite external participants to teams and spaces by default. If an external person is in your space, it is always indicated with a yellow icon on the bottom right of the window.

Click this icon to quickly see a list of people with email domains outside of your company.

3 best practices for collaborating with external people:

1. **Awareness**

   When setting up new teams and spaces, let everyone know if the intention is to include external people. Be clear about what should and shouldn’t be discussed with them. A best practice is to indicate ‘EXTERNAL’ clearly in your space name.

2. **Moderation**

   For more control, turn on “moderate space” to control membership. This way, you can be sure that members don’t accidentally invite external people to spaces made for internal people only.

3. **Spaces**

   Spaces within teams offer an easy way to work with external people, without giving full access to the entire team.

Here’s a quick example from our Project X space:

Let’s say that Project X is largely an internal project. However, for visual design, you need to work with an agency. It’s simple. Just add the external participants to the ‘visual design’ space. Your team members will be able to collaborate with them there, but external members won’t have access to all the other spaces in the team.
Large communication spaces

For larger businesses, Webex Teams can also be used as a slightly more formal communications channel. Let’s take a look at how leaders can connect to their wider teams on the go:

Executives – keep your finger on the pulse
Executives regularly run “town hall” and other larger meetings to communicate with the company. Now, keeping conversations and ideas flowing in between these scheduled sessions is easy.

Top tips
- Create a space and invite the people who attend your town halls gatherings (up to 5000 of your closest colleagues and friends).
- Post an opening message to explain the purpose of the space.
- Ask people what’s top of mind before the next town hall.
- During the event, communications and/or supporting teams can share relevant files and content for easy access.
- Presenters can also encourage people to share their reactions in the space.
- If you record your town halls, you can even post the recording in the space.
- Thank everyone for attending and summarize key takeaways from the session.
- Encourage continued discussion and Q&A between events.
- Check the space regularly to stay updated on your wider teams top of mind.

Experts – ask me anything
Even the most organized teams occasionally just need an answer from an expert, fast. To help your employees and clients, why not set up an “Ask me anything” Q&A space for easy access when it matters most?

Top tips
- Create spaces for different areas of expertise and invite the right experts.
- Post an opening message to explain the purpose of the space.
- Invite members who might want access to the experts and ask them to invite others they know (up to 5000 of your closest colleagues and friends).
- Encourage people to ask whatever they want about the area of expertise.
- Initially – make sure experts answer questions and share content they think will be of interest to the group in a timely manner.
- Explain how others can search for older questions and previously shared content. The space will become a valuable knowledge bank to query later.
Announcements

Some company departments like Human Resources and Corporate Communications need to ensure that everyone is informed about the latest news. If you only use traditional methods like email, many people don’t get around to reading updates and there’s very little feedback. How about taking the formality down a notch? Create an announcement space in Webex Teams, so you can post bite-size updates and links to the latest information.

Top tips

- Create a space and invite everyone you need to communicate with (up to 5000 of your closest colleagues and friends).
- Post an opening message to explain the purpose of the space.
- Let people know they can search for previous information.
- Go ahead and share bite-size updates on latest news, policy changes, and anything else you want to – all in one place.
- Make sure you encourage people to share feedback and ask questions.
- If the space isn’t for discussion, switch on “announcement mode” in settings to create a one-way communication channel.
- If you do this, selecting colleagues as moderators means they can share the responsibility of posting content too. Easy.
- For larger spaces, you may want to change your notification settings to only @mention so what matters most gets most of your attention.
Too many notifications?

Well, aren’t you popular.

If you are a member of many different teams and spaces, you may want to manage your notifications. Good news, you can select which options best suit you.

Here’s a handy guide of how you can take control of your notifications:

In both cases, you can choose the following options:

- **All messages**
  For those spaces that are really important to your role, use this setting to get notified every time a new message comes in. We don’t recommend this for larger spaces.

- **@Mentions only**
  A really useful setting that means you get notified when someone @Mentions your name directly or uses the @All feature to mention everyone in the space. We highly recommend this to help you manage what’s really important, especially in large spaces.

- **Off**
  To switch-off all notifications. Going on vacation? This one’s for you.

Learn more at [Cisco’s Collaboration Help Portal](#)
Get camera-ready

40% of people absorb and learn faster with video.*

73% of meetings end faster with video.*

That’s pretty cool. So, if you really want to get your point across and get more time back in your day – video beats audio only, any day.

Turn your video on

Go on, be brave! Turn your camera on, even if you’re having a bad hair day. Start a movement in your company that builds closer relationships – especially between people who have never met in person. Vulnerable video is the way to go.

Lights...

Bandwidth is your friend when it comes to high-quality video. Use Wi-Fi whenever available.

Don’t be that person. If you’re in a loud space, mute yourself when not talking. Background noises like typing, construction, or chatter can be distracting for other people. Your team will thank you.

Grab your headset. Not only will you hear other people better, but your voice will be much clearer for them too.

Camera...

Avoid awkward camera angles such as under your chin. Position your webcam slightly above eye level for the most natural position.

Be aware of your surroundings. Avoid sitting in front of a window during the day, as you will appear shadowed.

Working from home? Make sure you’re not sharing anything in the background you don’t want to (personal data etc.). A view of your busy kitchen or people walking around can be distracting.

Action...

Remember, people can see your body language, so make sure you’re actively listening. Stay engaged just like you would in person.

Likewise, be aware of the body language of your teammates, this real-time feedback means you can be sure they’re engaged.

For more meaningful interactions – keep your attention on the camera or your teammates’ faces when you’re talking to get best eye line.

Avoid multitasking and heavy typing if you didn’t mute yourself.

Have fun!

Using video means you can enjoy seeing your teammates. Be lively, break the ice with a joke, and keep everyone engaged. Forget about the technology and act as if you’re all together in the same room.

*Source: ZK Research, Unified Communications Survey

73% of meetings end faster with video.*

40% of people absorb and learn faster with video.*
Share and search

It’s amazing how much you can get done on Cisco Webex Teams, even when you’re mobile. No matter where your team is, working on files and content together should be simple. So, we made it that way.

Sharing
Things you can share:
- Messages
- Webpage URLs
- Documents and files
- Screen captures and screenshots
- Images
- Videos
- GIF animations (very cool)
- Whiteboards

You can upload files up to 2GB file size. Most content can be previewed in the space, without the need to download. This is especially useful when you’re mobile.

You can share content during a meeting without sending files. Each meeting attendee can share their screen or specific applications, to make sure you’re not sharing anything you don’t want to.

Searching
Search is easy. Click the search bar and enter your search terms. As you type, Webex Teams will present search results grouped into spaces, messages, and files to help you pinpoint what you are looking for.

Plus, you can refine your search by typing “In:” to find something in a specific space. Or, type “From:” to search messages or content sent by a specific person.

You can filter by

- Notifications
- Unread
- People
- Favorites
- Mentions
- Flags
- Drafts

You can also use search to quickly find individuals. Just start typing their name to see name matches appear.
Events made easy

Events small and large, rely on a wide variety of suppliers, partners and employees working together. Cisco Webex Teams is the perfect tool to bring everyone together - before, during and after the event.

Here’s a handy guide for how you could host a typical event with presentations, speakers and of course, attendees.

### Before

<table>
<thead>
<tr>
<th>We need to:</th>
<th>Use Webex Teams to:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bring the event team</td>
<td>Create a team with a space for each activity e.g. catering, audio/visual, security, promotion, budget, travel, etc.</td>
</tr>
<tr>
<td>together</td>
<td></td>
</tr>
<tr>
<td>Connect regularly in</td>
<td>Schedule weekly meetings in your team space. When you start the meeting, everyone on your team will see an easy ‘join’ button on any device they want.</td>
</tr>
<tr>
<td>real time</td>
<td></td>
</tr>
<tr>
<td>Keep attendees</td>
<td>Create a moderated space to announce event updates. Members can only read content, and you can see who and how many people have viewed it. Use Power Pack to bulk upload invitations to the space.</td>
</tr>
<tr>
<td>updated</td>
<td></td>
</tr>
<tr>
<td>Share content</td>
<td>Upload images, plans, presentations, agendas, parking details and more. Now all your content for the event team and attendees are in one place. Don’t forget, everyone has access to the same powerful search to quickly find information.</td>
</tr>
</tbody>
</table>

### On the day

<table>
<thead>
<tr>
<th>We need to:</th>
<th>Use Webex Teams to:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Communicate in real time with attendees</td>
<td>Find parking, get a badge, share when presentations start and more - use spaces and teams to publish on-the-day information and reminders.</td>
</tr>
<tr>
<td></td>
<td>Create a space for presenters and VIPs to keep them up to date, provide instructions related to mic set-up and equipment and a channel for open communications throughout the day.</td>
</tr>
<tr>
<td>Take speaker questions from the audience and</td>
<td>Create a space just before the event, for speaker feedback. Use the Power Pack to bulk upload the latest list of attendees. They’ll receive an email notification and instructions on how to download the app.</td>
</tr>
<tr>
<td>get presentation feedback from attendees</td>
<td></td>
</tr>
<tr>
<td>Manage the event in real time</td>
<td>Invite people to propose questions for speakers or comment on content presented throughout the day.</td>
</tr>
<tr>
<td></td>
<td>Keep in constant contact with your event team so that the entire day goes without a hitch.</td>
</tr>
</tbody>
</table>
After the event

<table>
<thead>
<tr>
<th>We need to:</th>
<th>Use Webex Teams to:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Have a team debrief</strong></td>
<td>Congratulate! Time to wrap up the event with the event team. Now it’s easy to share thank you messages to the event support team.</td>
</tr>
<tr>
<td><strong>Share how it went</strong></td>
<td>Use spaces to share event highlights, photographs, metrics and feedback with everyone and provide information about the next event.</td>
</tr>
</tbody>
</table>

**Top tips**

Need to catch up with anyone? Just hit ‘meet’ in your event space and get whoever is available.
Power Pack is a collection of tools for simplifying repetitive tasks in Cisco Webex Teams. [Power Pack can be found here.]

Important note: Power Pack is a beta service and not subject to formal Cisco support processes and service level agreements.

Tools currently available in Power Pack:

- **Invites** allows bulk uploading of people into a space, instead of adding them one by one.
- **Broadcasts** sends the same message to multiple spaces you’re a member of.
- **Exodus** enables you to remove yourself or others from multiple spaces at once, to declutter your account.
- **Export** is for extracting member details from a space to use as invites to a new space. This is useful for creating a new space for a different purpose with the same members.
- **Team Space Manager** is for creating new teams, and its spaces. Manage team membership here.
- **My Stats** provides details about your activities. See how many spaces, teams, and 1 on 1 conversations you’re in.

**Alpha Tools** is a storage place for extra useful features that have been requested by some but are too specific for the core product.

**Support** tells you where to get help with Power Pack and has an option for joining the Ask Power Pack space, so that you can interact directly with the Cisco team.
Integrations connect other applications to Webex Teams to publish content in spaces. Here's a few examples:

- If a tool is down, a space can be automatically created that invites all the people needed to fix the problem together.
- In sales? If your team needs constant deal updates, it’s easy to add updates from your CRM application to a sales team space, published automatically in real time.

Bots

A bot is a simple way for users to use natural language to request tasks to be completed in another platform. Let’s use the previous sales team example. A sales representative could ask a ‘deals’ bot a question like ‘show me deal updates for my customers.’ The bot would go to the previously connected CRM platform, and take real-time results of that person’s deal updates and post them in the space.

In Webex Teams, a bot is a member of a space just like any other real person. The possibilities of bots are endless. They can be as simple as getting weather updates where you live, or as complex as booking a meeting room or a flight.

Here are some examples:

- Conduct and manage surveys
- Submit expenses and raise purchase orders
- Onboard employees
- Sign contracts
- Pay a bill or invoice
- Try out integrations and bots

Jump to Cisco Webex App Hub to browse integrations available for popular business applications and also some that third-party developers have built that could be useful to your organization. Simple integrations and bots can be built without the need to write code, but more complex ones will need software developers. Jump to developer.webex.com to build your own integrations and bots.
You know how easy Cisco Webex Teams is – now it’s time to tell your teams! The very best training focuses on how Webex Teams improves the way people work, not just how to use it.

Successful trainings have:
- Simple objectives that the attendees care about.
- Clear solutions to meet those objectives.
- Immediate actions attendees can take during and after the training to change their behavior.

Use this top ten checklist to get started:

1. **Audience:** Make sure you know who’s attending the training, and what their team needs to achieve on a daily basis.

2. **Background:** Provide information on why their leadership wanted to invest in better team collaboration, powered by Webex Teams. Knowing employees are supporting leadership direction means a lot more organic support from the start.

3. **Relevancy:** Come prepared with a few ways Webex Teams can help them achieve their specific goals. In particular, make sure you cover:
   - WIFM (“What’s in it for me?”)
   - What features really matter to my team?

4. **Create a space** and give it a name like “Webex Training for team x”. Invite all trainees to the space.

5. **Post a welcome message** that introduces the space and its purpose. Share any Webex Teams user guides or videos to the space to build up a bank of useful resources.

6. **Create a meeting** invite for the training for everyone in the space.

7. **Ask for interaction** before the session. Ask trainees to introduce themselves in a message. Ask about where they’re from, weekend plans, do they have pets? Based on their answers, ask them to post pictures, documents or other details.

8. **Set small tasks** and give positive feedback along the way!

9. **Try and include** a wide range of tasks. If you’re getting good engagement before the training, ask them to check out other simple tasks, like playing tic-tac-toe or create a drawing on a whiteboard. Encourage continued use of the space by making it fun and competitive.

10. **Open any slides, applications, websites, etc.** that you plan on showing. Have your calendar open, so you can show them calendar invitation when you cover meeting scheduling in Webex Teams. Close any applications that show pop-up notifications.

Here’s a handy formula for effective training:

- **30%** should cover the basics of what Webex Teams is, and how to use common, basic features.
- **30%** should be examples of how different types of teams work and how Webex Teams helps them.
- **40%** should be interactive brainstorming on how attendees’ can specifically change how their teams work.
Training formats

In-person training
If you’re planning on delivering an in-person training session, we recommend small groups of less than 20. It’s just the right size for a balance of interaction, and lets the instructors help students individually when needed.

Virtual training
The key to virtual training? Keep it interactive! Make sure you include activities that require active participation throughout. It doesn’t need to be complicated. Even simple activities like “please answer in the Webex Teams space” keeps attendees engaged.

Hybrid training
Hosting training where some people are in the same room as the instructor and others join in virtually carries the most risk of a disengaged audience. Generally, we recommend you separate these out. Most often, those who are virtual will be less engaged and less able to participate than those in the room.

Top tips
Got a great camera?
Add a little personality to profile pictures! Hilarious hats, funny faces – try and make the initial touch and feel of Webex Teams fun, human and personal. In an in-person setting provide a few fun props to make setting up their initial profile fun.

Top tips
Giving prizes - virtually
Even virtually, you can reward participation with cost-free prizes! People value time more than anything. How about running a virtual competition to get the most number of colleagues in a space? For example, “the first person to get 50 or 100 colleagues into a space wins a video based mentoring meeting with a leader at your company!”

Top tips
Connect hubs of teams
If you have to provide a hybrid option – do it with hub locations. Ideally, you would have 3-5 ‘hubs’ of in-person teams that would join, and each have a mix of in-person and virtual tasks and activities to complete as they learn.
Questions/comments?

Join the Webex adoption space or email WebexAdoption@cisco.com