Best practices

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Cisco Webex

Teams

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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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

Contents

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Space activities

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 group space, or a 1 on 1 space. Easily add screen captures, emojis, and @Mention people to grab attention.

Call

In a 1 on 1 space, or a multi person space, make direct voice and video calls to talk anytime. All members see when a meeting has started and can choose to join or not.

Meetings

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.

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.

Top tips

Access space settings with the (i) button near the space name to adjust notifications.

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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.
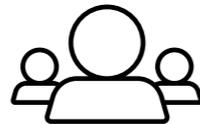
What is a team?

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:

Team	**Team**	**Team**
Steve's Direct Team	Project X	Global IT Organization
• • • • • • • • • • • • • • • • • •	• • • • • • • • • • • • • • • • • •	• • • • • • • • • • • • • • • • • •
Spaces	**Spaces**	**Spaces**
▪ General	▪ General	▪ General
▪ Team budget	▪ Planning	▪ Telecommunications
▪ Activities	▪ Feedback	▪ Information systems
▪ Weekly meeting	▪ Fresh ideas	▪ Computing support
▪ Celebrations	▪ Copy writing	▪ Technical services
▪ Time management	▪ Visual design	▪ Information security
	▪ Deliverables	▪ IT procurement

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Spaces vs Teams

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

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

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User roles

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

	Role: Moderator	Role: Member
Space	In a moderated space, moderators can: ■ Add or remove members ■ Edit space information ■ Make other members moderators ■ Delete other members' messages	■ When a space is not moderated, all members have the same privileges. They can add and remove members and change the space settings. ■ When a space is moderated, standard members do not have these privileges.
Team	Team creators are automatically moderators. They can: ■ Add and remove spaces ■ Add and remove members ■ Edit team information ■ Make other members moderators	In a team, members are: ■ Automatically added to the team space named 'general'. ■ Can view and join other spaces in a team. ■ Can add new people as guests to unmoderated spaces in a team, but not to the team.

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Teams

Working with external people

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.

Role: External
Space   - Any combination of internal and external people can be added to a space.   - When a space includes people from outside the company, an icon is shown.
Team   - A team moderator can invite any combination of internal and external people to a team and all can participate fully.   - Members of specific spaces in a team can invite any combination of non-team members, whether internal or external to your company, but they don't become members of the whole team.

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:

Team
Project X

Spaces

- Spaces
- General
- Planning
- Feedback
- Fresh ideas
- Copy writing
- Visual design. (EXTERNAL)
- Deliverables

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.

Large communication spaces

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.
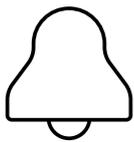
Too many notifications?

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:

Global

Apply the same notifications settings to all spaces at once. See Set notifications for all spaces if you need help setting this.

Custom

Customize notifications for each individual space. See **Set notifications** for certain spaces if you need help setting this.

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.

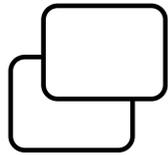Avoid multitasking and heavy typing if you didn't mute yourself.

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.
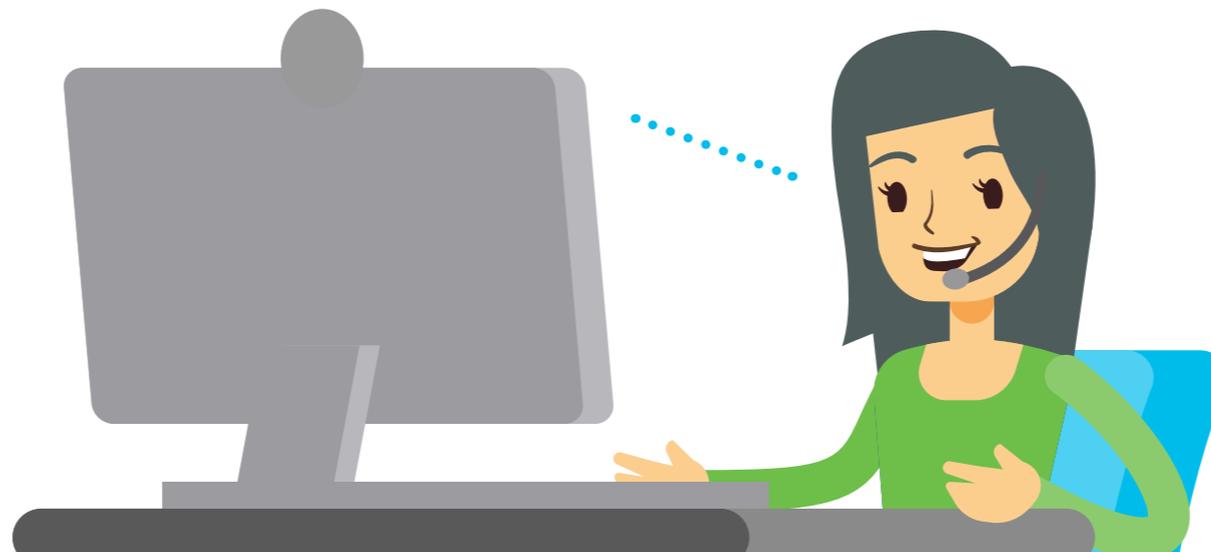
Share and search

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.

In:

From:

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

We need to:	Use Webex Teams to:
Bring the event team together	Create a team with a space for each activity e.g. catering, audio/visual, security, promotion, budget, travel, etc.
Connect regularly in real time	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.
Keep attendees updated	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.
Share content	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.

On the day

We need to:	Use Webex Teams to:
Communicate in real time with attendees	Find parking, get a badge, share when presentations start and more – use spaces and teams to publish on-the-day information and reminders. 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.
Take speaker questions from the audience and get presentation feedback from attendees	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. Invite people to propose questions for speakers or comment on content presented throughout the day.
Manage the event in real time	Keep in constant contact with your event team so that the entire day goes without a hitch.

After the event

We need to:	Use Webex Teams to:
Have a team debrief	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.
Share how it went	Use spaces to share event highlights, photographs, metrics and feedback with everyone and provide information about the next event.

Top tips

Need to catch up with anyone?
Just hit 'meet' in your event space
and get whoever is available.

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Power Pack

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 and bots
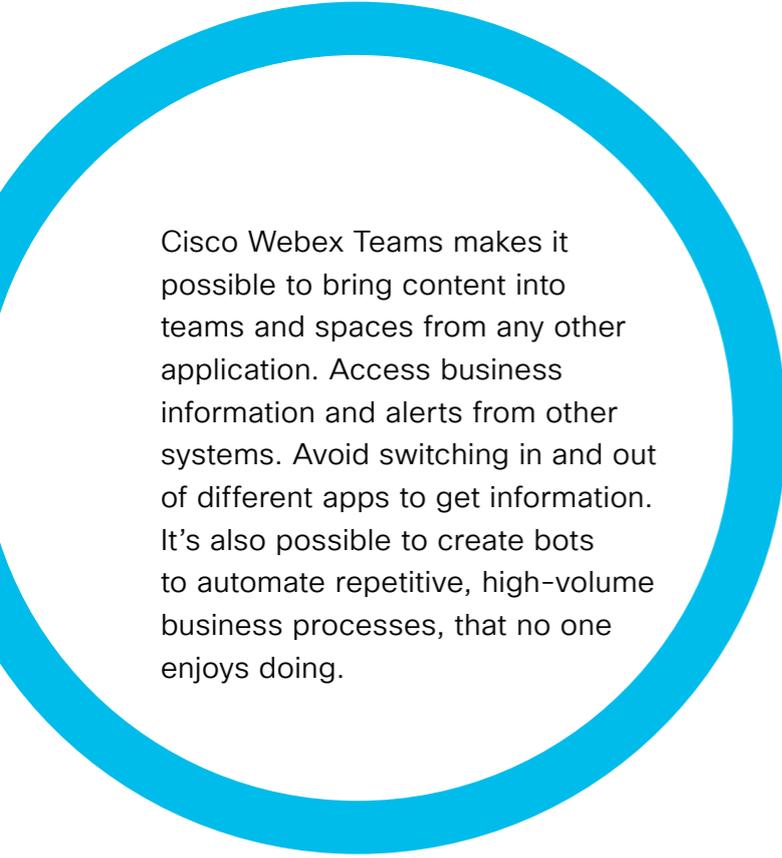
Cisco Webex Teams makes it possible to bring content into teams and spaces from any other application. Access business information and alerts from other systems. Avoid switching in and out of different apps to get information. It's also possible to create bots to automate repetitive, high-volume business processes, that no one enjoys doing.

Integrations

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.

Top tips on training

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.

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.

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.

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Teams

Training formats

Because Webex Teams makes virtual experiences so easy, you can deliver training in-person, or virtually, or a combination of both.

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.

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.

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.

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!"

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

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.

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Questions/comments?

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