Microsoft

A crash course in Microsoft 365 for business

Bring your people and information together with a powerful, secure productivity suite that helps run and grow your business.

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Introduction

Business growth depends on your people doing their best work. That means making sure they have the right tools to collaborate and be productive from anywhere. But you also need to make sure that productivity doesn't come at the cost of keeping your company and customer data safe.

Microsoft 365 lets you strike the right balance, with productivity from virtually anywhere and always-on security. Microsoft 365 is designed for the way that businesses work today—

with remote and on-site teams, simultaneous collaboration across multiple projects and time zones, and people working from all types of different devices.

Microsoft 365 helps with all these challenges, providing an integrated solution that combines the productivity of Office applications with advanced security and device management capabilities.

In this e-book, you'll learn how Microsoft 365 can help your business thrive and grow.

1.

Get more done

Get AI tools and the ability to store, access, and share files from anywhere

Scenario 1

Use AI to help you work even smarter

The power of the cloud lets you leverage intelligent services in Microsoft 365 to produce better results and save time, so you can focus on the priorities that matter most to your business. One example is PowerPoint Designer, which uses artificial intelligence (AI) to help you create beautiful slides with just one click. While you're putting content on a slide, Designer works in the background via the cloud to match your content to expertly designed layouts—so anyone in your business can make more professional-looking presentations. In Microsoft Excel, AI powers the new Ideas feature, which offers insights and suggestions tailored to your work, such as automatically identifying trends, patterns, and outliers in a data set.

Scenario 2

Save time with easier file access

Small business owners spend more than 33 hours a month on administrative tasks, time that could be better spent on more valuable activities such as sales and business development.[1] OneDrive for Business cuts down on wasted time by making file access quick and easy. You can share files and collaborate on documents with anyone, inside or outside of your organization. With 1 TB of storage, there's also plenty of room for your files, and you can search files and folders across any device, from anywhere. Looking for an earlier version of a file? Right-click on the file name for a history of up to 25 versions.

[1] "The top admin tasks holding back small businesses," CA Today, May 2016.

How it works

Avoid versioning issues caused by passing files back and forth via email.

1. Save an edited file in OneDrive.

2. Open a new email in Outlook and select **Insert** and **Attach file**. Then, select the file you want to send from recent files saved in OneDrive.

3. Instead of a static (and possibly outdated) file, a OneDrive link to the latest version of the file is attached to your email. Click on that link to **Change permissions** for added security and allow only certain people to edit or view the file.

Because a OneDrive link is attached, files are kept out of your inbox and everyone works from the most recent version.

2.

Work better together

Chat, meet, and collaborate

Scenario 1

Get your people on the same page

Everyone working on a project can chat, meet, and collaborate with Microsoft Teams. Teams brings together people and information in a shared workspace with group chat, calling, and online meetings. Plus, you have access to built-in Office apps, so you can review and edit Word, Excel, and PowerPoint files within Teams. With Teams apps for mobile devices, you can stay connected to your team from almost anywhere. Inside Teams, you can interact with over 250 business apps, including Trello, Evernote, Adobe, Github, and Zendesk.

Scenario 2

Use shared mailboxes to keep up with customers and prospects

Microsoft Outlook can help you keep up with customers using a shared mailbox and alias, such as "help@contoso.com" or "sales@contoso.com." Outlook makes it easy for a group of workers to monitor and send email from the shared alias. When someone in the group replies to a message sent to the shared mailbox, the email appears to be from the shared address, not from the individual user. You also can have a shared calendar associated with the mailbox (for example, a dedicated Support or Sales calendar).

How it works

Need to review a document, spreadsheet, or presentation with a coworker or client in real time?

1. In Teams, start a chat with a coworker, then start a voice call.

2. Once the call starts, select **Share Screen,** then choose the document you want to review together.

3. Now you can both view the document at the same time.

4. If you want more people to join the review session in Teams, select **Invite more people.**

Thanks to Teams, we're able to tap into exactly what its name conveys— teamwork. In my entire career, I've never seen people who can use a single tool to get up to speed on so many different projects so fast.

Julia Hawkins,
President and Chief Revenue Officer at the Future of StoryTelling

3.

Build your business

Get more customers, track and grow relationships, and streamline processes

Scenario 1

Keep customers close

Still managing customer data in a spreadsheet? Microsoft 365 can help you nurture relationships with Microsoft Bookings designed especially for small businesses. Microsoft Bookings can help simplify scheduling and appointments, so you can save time, decrease no-shows, and give your customers more convenience and control.

Scenario 2

Simplify scheduling

Businesses that rely on providing services via appointments—such as medical offices and consulting and law firms—need a dependable way to manage the booking process. Microsoft Bookings provides an easy interface for both employees and customers. In addition to automatically scheduling appointments, Bookings gives workers the flexibility to manually schedule, reschedule, cancel, or otherwise modify appointments based on stray phone calls and emails from customers. Bookings also helps managers modify staff lists, define services and pricing, set hours, and integrate existing customer/client lists.

How it works

Schedule customer appointments with Bookings. You can then publish your Bookings page to your website:

1. In the Bookings navigation pane, select Booking page.

2. Verify your scheduling policies are correct and then select **Save and publish**.

3. Select **Open published page** to see your page in a web browser.

Microsoft Bookings is both an online and mobile app, and it's great for businesses that provide services to customers on an appointment basis.

4.

Safeguard your data

Help protect against external threats and leaks with built-in privacy and compliance

Scenario 1

Control access to documents and information

Mobility is a good thing, but only if you can keep your data safe. Microsoft 365 lets you set policies to help control access to your organization's email and documents for supported mobile devices and apps. If a device is lost or stolen, you can remotely wipe it to remove company data.

Scenario 2

Defend against ransomware and malware with threat protection

Sophisticated threats can fool even vigilant employees. Microsoft 365 is built with enterprise-grade security in mind, with automatic updates so you never have to worry about end of support. Each user automatically receives the latest security updates from Microsoft 365 and Windows 10 to protect your business's data against emerging threats, from malware to phishing to ransomware. For example, if your employees have Surface devices and Microsoft 365 subscriptions, they'll be able to work and collaborate on the go, with no trade-off for security.

How it works

If an employee's personal device is lost or stolen, or the employee no longer works for you, company data could be at risk. Here's how to remotely wipe business data from an employee's personal device.

1. In the Admin Center, click on the **Devices** card.

2. Search for your user to view all their devices.

3. Select the device you wish to remotely wipe, click **Remove company data** and **confirm**.

The next time that user logs in to an Office app on that device, they will be notified that your business's data has been removed.

There's no way we could secure our servers to the degree that Microsoft does. We sign massive NDAs for banks and corporations that guarantee the confidentiality of their information. Being behind Microsoft walls gives us far stronger security.

Emma Bannister,
Chief Executive Officer at
Presentation Studio

5.

Simple to manage

Easy to set up and manage your users, devices, and data, giving you time back

Scenario 1

Manage users and devices all in one place

The Microsoft 365 Admin Center is your control center for Microsoft 365, giving you a single place to configure security policies and manage devices and apps. The Setup Wizard condenses 45 enterprise-grade security settings into 15 easy-to-understand toggles and pulldown menus. You can set policies for mobile and Windows 10 devices, such as requiring a PIN or fingerprint to access files on a mobile device.

[2] "[Best Practices: Selecting, Deploying, and Managing Enterprise Password Managers](#)" Forrester, January 2018.

Scenario 2

Securely access apps and data with Single Sign-On

Microsoft 365 makes it easier for your workers to use multiple apps and devices. With Single Sign-On, employees only need to remember one login across every app, Windows 10 device, and service, which helps save time and money on IT support without compromising security. (Research shows that the average adult manages 25+ online accounts with name/password combinations, and some larger organizations spend more than $1 million annually on password-related support alone.) [2]

How it works

Do you need different policies for people working in different roles (for example, marketing, finance, or HR)?

1. In the Admin Center, select **Add policy** on the Policies card.

2. Name the policy and select the policy type. For example, select **Windows 10 Device Configuration**.

3. You can select different options for a particular team. For example, you may want one group of employees to be able to download apps from the Windows Store, but not another.
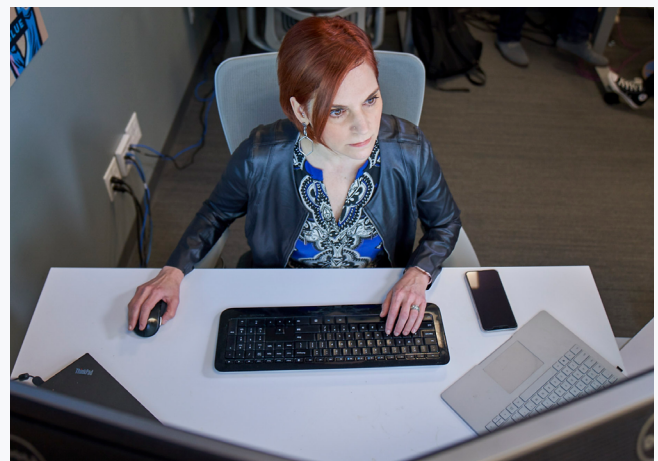
Choose the right plan for your business

Microsoft 365 is a subscription that includes premium Office apps, powerful IT management services, and advanced security that can help you run and grow your business. By choosing the right Microsoft 365 plan and pricing for your business, you can stay flexible and scale as needs change—for example, by adding or transferring seats for new workers.

Microsoft 365 helps you:

- Create your best work with Word, Excel, PowerPoint, and Outlook.

- Chat, meet, and collaborate with Microsoft Teams.

- Store, access, and share your files anywhere with 1 TB of OneDrive storage.

- Work from anywhere with Office apps on any device.

- Safeguard your business with enterprise-grade protection and 24/7 support.

- Ensure you always have the latest, most secure version of Windows 10 and Office applications.

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