



MEETING YOUR CLIENTS REMOTELY WITH MICROSOFT TEAMS

Hi there,

At Irish Life, we pride ourselves on helping you and your clients build better futures. We are here and ready to make sure we continue to provide the support you need to grow and develop your business.

We are committed to supporting you with remote working. The value of advice to your clients is more important now than ever. That's why we've created this guide to help you meet your clients through Microsoft Teams.

This guide focuses on Microsoft Teams, but we have guides for other video conferencing applications you can use. There are also other video conferencing applications available - these are just some examples.

Benefits of Microsoft Teams for you and your clients:

- Screensharing with clients for a more immersive and collaborative experience.
- Client can now have their partner join in the meeting remotely.
- Offers a blended approach and alternative to face to face advice.
- Reduce travel time spent travelling long distances to customer meetings.
- Bring in clients from different locations.



SETTING UP MICROSOFT TEAMS



In order to download Microsoft Teams, you must have a **Microsoft Enterprise or Office365** package. Contact your Account Manager for more information if you don't have this set up.

If you have Microsoft Enterprise or Office 365 package you can download the Microsoft Teams app on your device.



SETTING UP A MEETING WITH YOUR CLIENT



To set up a meeting with your client, simply click on your **Calendar** and select **New Meeting**. As Microsoft Teams is purpose built for collaboration between teams, you may find that your client might not have Microsoft Teams. However, your client does not need to have a Microsoft Teams account. This guide will show you how you can schedule a meeting without your clients having a Microsoft Teams account.

Your Microsoft Teams calendar may be synched in to your Outlook app, so if you schedule a meeting through Teams, it will be recorded on your Outlook.

1. To set up a meeting, sign in to your Microsoft Teams account.
2. Go to **Calendar** on your Microsoft Teams App.
3. You can click on **+New Meeting** or click on the time you would like in your calendar. A meeting scheduler will pop up.



Fill in the appropriate tiles.

You can enter you client's full email address on the Required Attendees as this is a free text box. **Click on Invite.**

To see Microsoft's full guide in scheduling a meeting through your Microsoft Teams App, click on these links below.



You can also schedule a meeting through your Outlook. To find out how to do this, check out Microsoft's guides below.



SENDING YOUR CLIENTS THE MEETING INVITE



When setting up the meeting on Microsoft Teams, your client doesn't need a Microsoft Teams account. Simply add in their full email address and send them the meeting invite.

RE-SCHEDULING OR CANCELLING YOUR MEETINGS



If you have to re-schedule your meeting with your client, you can do this through Microsoft Teams.

To cancel your meeting with your client, simply go to your meetings and [send a cancellation](#).

JOINING A MEETING



To join the meeting, right click on the calendar event and click on [Join Online](#). It will also show a [Join](#) button on your calendar five minutes before the start of the meeting. However, if you have overlapping meetings on your calendar, this button will not appear. If your client joins the meeting before you, the event will change colours to let you know they are online.

If you need more information, you can look at [Microsoft's guide on how to host online meetings for your business](#).



CLIENTS JOINING THE MEETING



Your client will get your meeting invite through email. In order to join the meeting, all they need to do is click on the link within the meeting invite to join.

Your clients have two options:

Option 1:

- Join through the web link

Option 2:

- Download the Microsoft Teams App if they have a Microsoft Teams account.
- Your client simply has to type in their name and click **Join Now**.

JOINING A MEETING WITH
MICROSOFT TEAMS



Broadband connection can affect the quality of your meeting. To make sure your meeting runs smoothly, do a test run with your client before your scheduled meeting if you can.

**TOP
TIP!**

SHARING YOUR SCREEN WITH YOUR CLIENT



With Microsoft Teams, you can share your screen or files with your client. This allows you to have a more immersive and collaborative meeting with your client.

To share your screen or files with a client, simply click on **Share Screen** button.

Select what you want to share:

- **Desktop** lets you show everything on your screen.
- **Window** lets you show a specific app.
- **PowerPoint** lets you show a presentation.
- **Browse** lets you find the file you want to show.

**TOP
TIP!**

A panel below the toolbar will show the screens that are available to share. Select the screen you wish to share from Window panel. After you select what you want to show, a red border surrounds what you're sharing. Select **Stop sharing** to stop showing your screen.

Only have the review open for the customer meeting minimising the risk of sharing the wrong screen.

**TOP
TIP!**

SHARING WITH
MICROSOFT TEAMS



MICROSOFT TEAMS' SECURITY POLICY



Microsoft Teams has an extensive security and privacy policy which you can read here.

**MICROSOFT TEAMS
SECURITY POLICY**



USEFUL RESOURCES

If you are having any problems, there are many resources available online from Microsoft which can help you further.



What is
Microsoft
Teams

Microsoft
Teams Video
Training

Managing
your
Meetings

Host or
attending a
Microsoft
Teams Meeting
Guide

Tips for
better
Meetings

Microsoft
Teams
Downloadable
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