

Day in the life – Finance

Meet Adira, a Senior Product Manager at Contoso Bank who uses Microsoft Teams to help her organization develop new financial products, deliver differentiated services to its commercial clients, and drive revenue growth.

7:45 AM

At home, Adira reviews the Teams app, sees a conversation marked as important and is @ mentioned from Monica. She indicates they have a chance at winning their bid at Fabrikam! Adira responds and says she'll put together a plan and team by end of day.

8:30 AM

At the office, she starts a private conversation in Teams with her colleague Darryl. They discuss ways to approach the Fabrikam deal. She adds him to the "Account" Team so he has access to conversations and content.

9:30 AM

Adira sees a conversation on Teams from Darryl, referring to past documents from similar opportunities. She schedules a meeting for 11:30 AM and invites Darryl and other team members.

11:30 AM

At their meeting, Adira, Darryl, and the team brainstorm ideas to build a response to the Fabrikam opportunity. Adira and team use OneNote within Teams, along with Power BI dashboard to plan out their strategy.

2:00 PM

Receives a notification in Teams from the budget tracking app about a revenue gap. She determines their best option is to get approval for revised sales quota increase.

3:30 PM

Adira puts together meeting summary notes and commits to sending the budget document out by 5:00 PM. To help her with her document, she plays a recording of the CFO discussing budget goals.

4:00 PM

Back home, she uses her tablet to create the 'Fabrikam proposal team', and adds external vendors using the Teams guest access. She uploads notes to the shared OneNote, builds a plan with owners, and uploads all the reference materials.

5:00 PM

Everyone on the 'Fabrikam proposal' team is up to speed and ready to work together to build a winning proposal.