

THE ULTIMATE CHECKLIST

FOR



MICROSOFT TEAMS GOVERNANCE



TABLE OF CONTENTS

Pg.	Title
3	Introduction
4	Checklist
5	Understanding and Implementing the Checklist
6	User Management
7	Teams /Groups Assessment
8	Naming Conventions
9	Lifecycle Management
10	Policies
11	Sensitivity Labels Usage
	Bonus:
12	7 Essential Governance Tips for Microsoft Teams
14	Conclusion



INTRODUCTION

Optimizing Microsoft Teams Governance: A Strategic Approach

Welcome to our Microsoft Teams Governance Checklist, a tailored guide designed to help you navigate and optimize the governance of your Microsoft Teams environment. In today's rapidly evolving digital workspace, effective governance is key to ensuring that collaboration tools like Microsoft Teams are used efficiently, securely, and in compliance with organizational standards.

This checklist serves as a comprehensive resource for IT administrators, team leaders, and decision-makers who are responsible for managing Microsoft Teams. Whether you are looking to streamline user management, enforce consistent naming conventions, implement effective policies, or manage the lifecycle of teams, this guide provides actionable insights and best practices to enhance your governance strategy.

In addition to practical checklist items, this guide offers detailed explanations, governance tips, and links to in-depth blog posts for further exploration. Our aim is to equip you with the knowledge and tools necessary to establish a well-organized, compliant, and effective Microsoft Teams environment.

Embrace this guide as a starting point in your journey toward mastering Microsoft Teams governance. By applying these principles and practices, you can ensure that your Teams setup aligns with your organizational goals and fosters a collaborative, productive, and secure workspace.



MICROSOFT TEAMS GOVERNANCE | CHECKLIST

1. User Management

- ✓ **User Score for Externals:** Ensure compliance in adding and managing external users with proper permissions and validated email addresses.
- ✓ **Teams per User:** Monitor and manage the number of teams per user to avoid duplication and ensure productivity.
- ✓ **Inactive User Management:** Handle inactive users by disabling or deleting accounts and transferring ownership of resources.
- ✓ **External User Management:** Properly manage guest users, ensuring appropriate permissions and timely removal when not needed.

2. Teams Assessment

- ✓ **Managed Teams:** Ensure teams are properly managed according to guidelines.
- ✓ **Teams Without Owner:** Assign owners to teams for accountability.
- ✓ **Inactive Teams:** Identify and manage inactive teams, considering retirement or archival. Small Teams: Monitor small teams for effective use.
- ✓ **Large Teams:** Provide additional management for large teams.
- ✓ **Public Teams:** Review public teams for appropriateness and compliance.

3. Naming Conventions

- ✓ **Team Names:** Adhere to naming conventions for clarity and consistency, avoiding special characters and using proper capitalization.

- ✓ **OneNote Naming:** Follow organizational standards for naming OneNote notebooks.
- ✓ **Planner Board Naming:** Ensure Planner boards are named clearly and consistently. Email Nicknames: Use appropriate and professional email nicknames, avoiding personal terms.

4. Lifecycle Management

- ✓ **Team Creation Process:** Follow procedures for team creation, including naming and policy application.
- ✓ **Active Use and Management:** Regularly update, review, and maintain teams in compliance with policies.
- ✓ **Retirement or Archival:** Properly retire or archive teams when no longer needed, following guidelines.

3. Policies

- ✓ **Applied Policies:** Create teams using established templates with necessary approval and compliance policies.
- ✓ **Policy Content:** Develop clear and detailed policies with relevant guidelines.
- ✓ **Controlled Teams Ratio:** Maintain a high ratio of controlled to uncontrolled teams.
- ✓ **Policy per Template:** Apply the correct number of policies per team, avoiding redundancies.

6. Sensitivity Labels Usage

- ✓ **Applied Labels:** Apply appropriate sensitivity labels to teams and channels.
- ✓ **Active Label Management:** Regularly review and update sensitivity labels as needed.

UNDERSTANDING AND IMPLEMENTING THE CHECKLIST

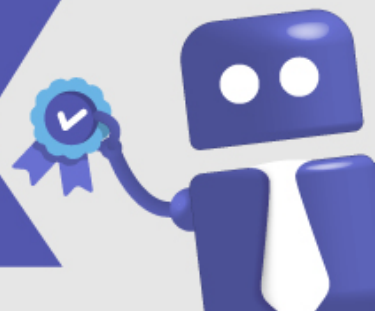
You've now reviewed the essential elements of our Microsoft Teams Governance Checklist. To help you delve deeper and effectively implement these practices, the following pages provide detailed explanations and insights for each point on the checklist. These explanations are accompanied by links to our comprehensive blog posts, offering you further reading and practical tips to enhance your Microsoft Teams governance strategy.

Use these resources to gain a fuller understanding of each area, ensuring your Teams environment is secure, efficient, and compliant with your organizational standards. Our blog posts, crafted by experts in the field, will guide you through the nuances of Teams governance and offer solutions tailored to meet the unique challenges faced by IT admins.

Let's begin this journey towards a more robust and well-governed Microsoft Teams experience.



PREVENT
uncontrolled growth
in Microsoft Teams



DETAILED INSIGHTS: USER MANAGEMENT

User Management in Microsoft Teams is crucial for maintaining a secure and efficient collaborative environment. This section delves into the specifics of managing external users, team creation practices, inactive user handling, and guest management. By adhering to these guidelines, you can ensure a well-regulated and productive Teams experience.

External Users

Importance: Proper management of external users is key to protecting sensitive information and maintaining compliance.

Best Practices: Include verifying user credentials, setting appropriate access levels, and regular reviews of external user access.

Teams per User:

Importance: Limiting the number of teams per user helps prevent duplication and ensures that each team serves a specific, productive purpose.

Best Practices: Regularly review and consolidate teams, and educate users about responsible team creation.

Inactive User Management:

Importance: Inactive user accounts can pose security risks and lead to clutter.

Best Practices: Implement a process for identifying and managing inactive accounts, including reassigning ownership of resources.

External User Management:

Importance: Efficient guest management ensures that external collaborators have appropriate access without compromising security.

Best Practices: Establish clear guidelines for adding, managing, and removing guest users.

Check out our [blog post](#) for an in-depth tutorial on using the Teams Manager app to streamline your team's organization.



EXTERNAL
USER MANAGER

GET CONTROL
over your Teams



DETAILED INSIGHTS: TEAMS ASSESSMENT

Teams Assessment is crucial for ensuring the overall health and effectiveness of your Microsoft Teams environment. This section covers various aspects such as the management of different types of teams, ensuring proper ownership, and handling team sizes. By regularly assessing these areas, you can enhance governance and collaboration.

Managed Teams

Importance: Properly managed teams are essential for efficient collaboration and compliance.

Best Practices: Regularly review team settings, memberships, and activities to ensure alignment with organizational policies and goals.

Inactive Teams

Importance: Identifying and addressing inactive teams helps prevent clutter and potential security issues.

Best Practices: Establish criteria for inactivity and processes for reactivation, archiving, or deletion of these teams.

Public Teams

Importance: Proper management of public teams is crucial for security and effective collaboration.

Teams Without Owner

Importance: Teams without clear ownership can lead to management challenges and security risks.

Best Practices: Implement a process for identifying and assigning owners to teams lacking them.

Small and Large Teams

Importance: Monitoring team size is key for optimal performance and resource allocation.

Best Practices: Assess small teams for consolidation opportunities and large teams for potential segmentation.

Best Practices: Regularly review public teams for appropriateness, and adjust settings or convert to private as needed.

Interested in learning more about Teams assessment and governance within Microsoft 365? Explore our comprehensive [blog post](#) for insights into risk management, Zero Trust, automation, and more.



DETAILED INSIGHTS: NAMING CONVENTIONS

Naming Conventions play a pivotal role in ensuring clarity, preventing confusion, and facilitating easy navigation within Microsoft Teams. This section covers best practices for naming team channels, OneNote notebooks, Planner boards, and email nicknames, helping you maintain a well-structured and professional environment.

Team Names

- **Importance:** Clear and consistent team names aid in easy identification and reduce the risk of duplication.
- **Best Practices:** Include using descriptive names, adhering to a predefined format, and avoiding special characters or ambiguous terms.

Planner Board Naming

- **Importance:** Properly named Planner boards facilitate project management and team coordination.
- **Best Practices:** Use names that reflect the purpose of the board, maintaining consistency in naming conventions.

OneNote Naming

- **Importance:** Well-named OneNote notebooks help in organizing information and enhancing team collaboration.
- **Best Practices:** Focus on descriptive, concise names and establish a uniform naming structure across the organization.

Email Nicknames

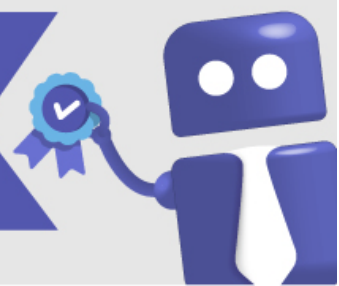
- **Importance:** Properly named Planner boards facilitate project management and team coordination.
- **Best Practices:** Use names that reflect the purpose of the board, maintaining consistency in naming conventions.

Check out our [blog post](#) for an in-depth tutorial on using the Teams Manager app to streamline your team's organization.



Teams
Manager

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over your Teams



DETAILED INSIGHTS: LIFECYCLE MANAGEMENT

Lifecycle Management in Microsoft Teams is essential for ensuring that each team serves a purpose and remains efficient throughout its existence. This section focuses on the stages of team creation, active use, and eventual retirement or archival, providing strategies to manage each phase effectively.

Creation

Importance: Properly established teams, created with clear objectives and guidelines, lay the foundation for effective collaboration and governance.

Best Practices: Follow a standardized process for team creation, including using templates, applying appropriate policies, and ensuring naming conventions are adhered to.

Active Use

Importance: Actively managed teams ensure ongoing relevance and productivity, avoiding stagnation and disorganization.

Best Practices: Conduct regular reviews, encourage active participation, and update content and memberships as needed.

Retirement or Archival

Importance: Timely retirement or archival of teams that are no longer active or needed helps in maintaining an uncluttered and efficient Teams environment.

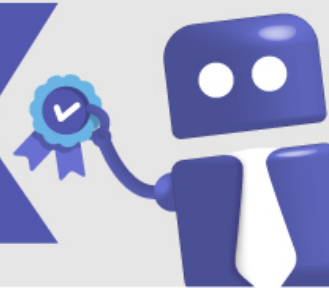
Best Practices: Establish criteria for retirement or archival, such as inactivity duration or project completion, and follow a structured process for decommissioning.

Discover how to create and manage lifecycles effectively with the Teams Manager app in our detailed [blog post](#).



Teams
Manager

PREVENT
uncontrolled growth
in Microsoft Teams



DETAILED INSIGHTS: POLICIES

Policies are a cornerstone in maintaining a well-regulated Microsoft Teams environment. This section delves into the specifics of applying policies per template, ensuring policy content is relevant and comprehensive, and maintaining a balance between controlled and uncontrolled teams.

Applied Policies

Importance: Using established templates with appropriate policies ensures that teams are created in alignment with organizational standards and requirements.

Best Practices: Regularly review and update policy templates to reflect current organizational needs and compliance requirements.

Controlled vs. Uncontrolled Teams Ratio

Importance: A higher ratio of controlled to uncontrolled teams indicates a well-governed environment, reducing risks associated with unmonitored team activities.

Best Practices: Implement monitoring mechanisms to track this ratio and take corrective actions when necessary.

Policy Content

Importance: The content of each policy should be clear, concise, and relevant, providing guidance without causing confusion.

Best Practices: Include essential elements like purpose, scope, and procedures in your policy documents. Regularly review these documents for clarity and relevance.

Policy per Template

Importance: Ensuring the correct number of policies per team template avoids redundancy and enhances compliance.

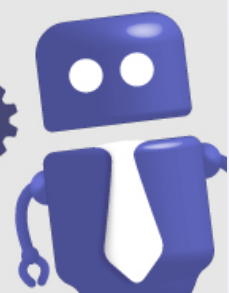
Best Practices: Evaluate each team's requirements and apply policies accordingly, avoiding a one-size-fits-all approach.

Gain even more valuable insights and practical solutions by exploring our comprehensive [blog post](#) on templates in Microsoft Teams.



Teams
Manager

Full Microsoft 365
PROVISIONING



DETAILED INSIGHTS: SENSITIVITY LABELS USAGE

Sensitivity Labels Usage is a key component in safeguarding information and ensuring compliance within Microsoft Teams. This section focuses on the application of labels to classify data based on its sensitivity, enhancing security and information management.

Applied Labels

Importance: Correctly applied sensitivity labels help in categorizing information, controlling access, and ensuring compliance with data protection policies.

Best Practices: Develop a comprehensive labeling scheme that reflects the sensitivity of the information. Train team members on the proper application of these labels to teams and channels.

Active Sensitivity Labels

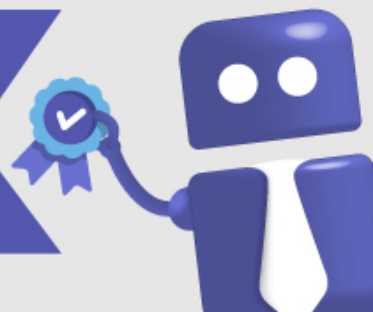
Importance: Actively managing sensitivity labels ensures they remain relevant and effective as organizational needs and policies evolve.

Best Practices: Regularly review and update the labels, considering changes in data sensitivity, organizational policies, and compliance requirements.

Dive into our [blog post](#) to explore the strategic implementation of sensitivity labels for data protection and compliance.

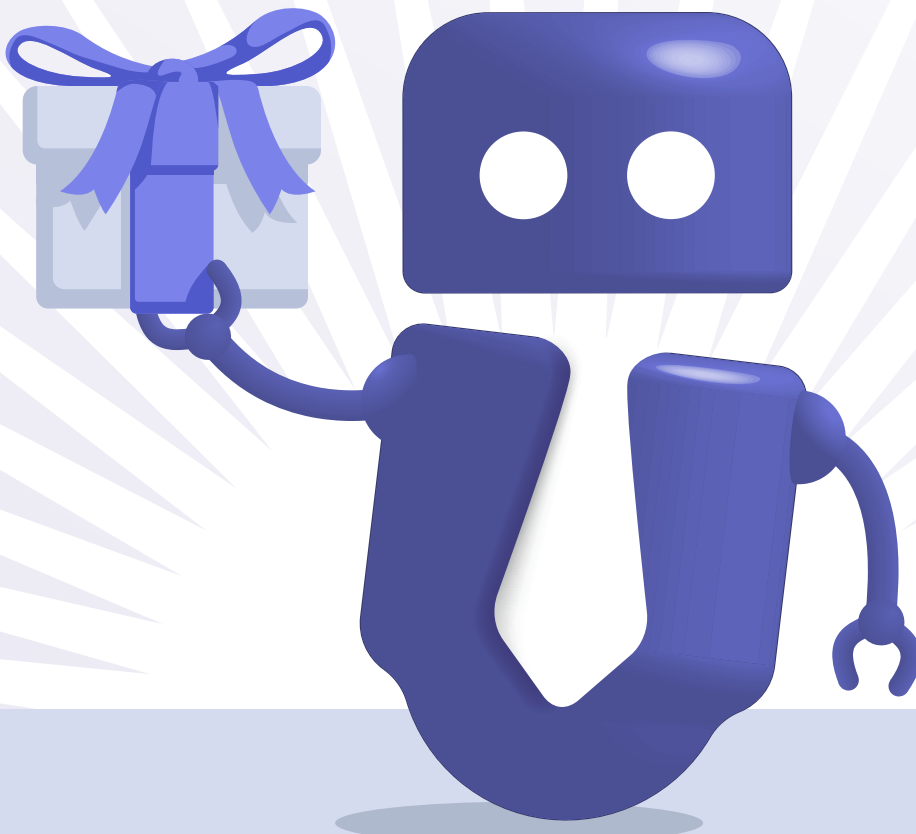


GET CONTROL
over your Teams



BONUS:

7 ESSENTIAL GOVERNANCE TIPS FOR MICROSOFT TEAMS



Maximize the efficiency and structure of your Microsoft Teams environment with these seven essential governance tips. Each tip offers a strategic approach to enhance control and organization within your Teams setup.

1. Create Your Template

Develop a standard template for teams to ensure a consistent setup, including predefined tabs, channels, and metadata. This standardization aids in maintaining uniformity across teams.

2. Activate Approval Processes

Implement approval workflows to prevent the creation of unnecessary or non-compliant teams, helping to retain a well-structured tenant.

3. Create Approver Groups

Establish dedicated approver groups aligned with specific policies. This ensures that the creation and management of teams adhere to pre-defined organizational structures and standards.

4. Define and Implement a Lifecycle

Manage teams effectively throughout their lifecycle with strategies for archiving and/or deletion under specific conditions. This approach helps in maintaining an active and relevant Teams environment.

5. Define a Naming Convention

Implement naming conventions for your projects to ensure consistent and clear identification. This facilitates better communication and organization within the Teams platform.

6. Develop and Apply Policies

Craft policies to be executed during the team creation process. These policies can encompass aspects like naming conventions and lifecycle management, ensuring teams are set up in accordance with organizational rules.

7. Utilize Templates in Team Creation

Apply your predefined templates when creating new teams, especially through the requests tab. This ensures that each new team aligns with the established governance framework.

CONCLUSION

Empowering Effective Governance in Microsoft Teams

As we conclude this comprehensive guide, it's important to reflect on the critical role that effective governance plays in maximizing the potential of Microsoft Teams within your organization. The practices and strategies outlined in this checklist are designed to help you navigate the complexities of managing Teams, ensuring a secure, compliant, and efficient collaborative environment.

By implementing these guidelines – from managing user access and enforcing naming conventions to applying robust policies and maintaining lifecycle management – you can significantly enhance the overall governance of your Teams setup. Remember, good governance in Microsoft Teams is not a one-time task but an ongoing process that requires regular review and adaptation to meet evolving organizational needs and technological advancements.

We encourage you to utilize this checklist as a dynamic tool in your governance toolkit, revisiting and updating it as needed. By doing so, you can ensure that your Teams environment remains a productive, organized, and compliant space for collaboration.

Lastly, we invite you to explore our blog for more insights and resources that can further assist you in mastering Microsoft Teams governance. Your journey towards a well-governed Microsoft Teams environment is an investment in the future of your organization's communication and collaboration effectiveness.

Connect with Our Experts

For additional guidance, support, or inquiries regarding Microsoft Teams governance and our range of solutions, please feel free to [reach out to us](#).

Our team of experts is dedicated to helping you optimize your Microsoft Teams environment and achieve your organizational goals.



CERTIFIED
Governance Specialist
for Microsoft Teams





Solutions2Share GmbH
January 2024