

ShareGate:

Win as a team





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JOANNE KLEIN
Sharepoint/Microsoft 365 Consultant
Office Apps & Services MVP



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ALEX FIELDS
Senior Solutions Architect,
SUCCESS Computer Consulting,
Office Apps & Services MVP



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ANDY HUNEYCUTT
Owner, UpSkill Tech, Inc.
Office Apps & Services MVP



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BEN NIAULIN
Head of Product at ShareGate,
Office apps and services
MVP & Microsoft Regional Director



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JASPER OOSTERVELD
Modern Workplace Consultant, InSpark
Office Apps & Services MVP



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JENNIFER MASON
Vice President Workforce
Transformation & Learning,
Planet Technologies,
Office Apps & Services MVP



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LUISE FREESE
Microsoft 365 Consultant
Microsoft MVP



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MAARTEN EEKELS
CTO, Portiva
Office Apps & Services MVP



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MARC D ANDERSON
Co-Founder and President,
Sympraxis Consulting,
Office Apps & Services MVP



PAGE 20-30



MARK RACKLEY
Partner / Chief Strategy Officer,
PAITgroup, Microsoft 365 MVP



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RICK VAN ROUSSELT
Managing Consultant/Technical
Evangelist, Advantive,
Office Apps & Services MVP



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SARAH HAASE
Collaboration Group Product Manager,
U.S. Bank,
Office Apps & Services MVP



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TRACY VAN DER SCHYFF
Microsoft 365 Coach & Catalyst,
The Guid Stuff, Office Servers
and Services MVP



ShareGate:

At ShareGate, we believe in technology that empowers humans.

That's why we're passionate about creating innovative, easy-to-use tools that complement Microsoft platforms like Microsoft 365, SharePoint, Azure, and Teams. Since 2009, we've been able to leverage this mentality to help over 75,000 IT professionals do better work.

ShareGate works this way too, providing a simple, user-driven process for the administration and management of Microsoft Teams—so your whole organization can get going in minutes, not weeks. That's what this guide is all about: leveraging Teams to its full potential and empowering your users while staying in control.

Got questions?

team@sharegate.com

sharegate.com

The Microsoft expert community

For as long as we've been enabling organizations to achieve more with technology, we've had help and support from a passionate community of experts. They have always been more than willing to lend a hand, listen to a problem, or share their thoughts and knowledge with individuals like you, who are trying to make the best out of the Microsoft productivity suite.

We hope that this curated guide of expert opinions proves to be insightful as you begin your journey working with Microsoft Teams. Inside, we've compiled inspiring insights from our expert partners to provide you with a "playbook" on how the pros think you can best move to, and master, Microsoft Teams.

Over the years, we've learned one definite thing: There is no one deployment and management playbook that will work for everyone.

Businesses range from small to large, leverage waterfall to agile processes, keep data on-prem to full-cloud remote, and have hundreds of other variations that can have an impact on processes and workflows. This makes it difficult to write a "one-size-fits-all" playbook that maintains our high standards of quality. Sorry.

Yet, that doesn't mean guidance is impossible. It can actually be a great place to start your own playbook.

With companies moving to all new ways of working—virtual collaboration, full time remote work, and borderless offices (to name a few)—a tool like Microsoft's hub for teamwork, Microsoft Teams, has risen as a critical piece of productivity software.

And with this rise in Teams usage, IT admins and managers are asking lots of questions and looking for advice:

"Where should I even start my adoption process?"

"How do I keep control with external access?"

"How do I give people an experience like they are used to in our old tool?"

"How do I prevent data loss for our company?"

We understand how you're feeling, and we wanted to lend a hand. So, we reached out to our friends in the Microsoft community to see what guidance they could offer.

We gathered their opinions and present their insights in this book so you can craft a personal self-service guidebook.

What we found was an overwhelming belief that collaboration between IT and the teams they support is crucial. There's a real push out there for IT to take a self-service approach, one that encourages growth and empowerment, allowing everyone at work to be as productive as possible.

Your users know their content and conversations. They're the best folks to ensure sensitive items stay close to home. Empowering your team to use Teams without limits and manage

it by themselves—with IT acting as a guide, not a guard—this is something that we like to call "self-service done right."

Our hope is that when you finish this guide, you've been challenged but you can also take what works for you and your organization and find a way to be as self-service as possible—driving your team to efficient Teams usage.

Thanks for reading,



The benefits of keeping “self-service” enabled

Teams is a powerful piece of software, and we know it can be tempting to hold on to the controls.

But there are some real advantages to sharing control with the users who work in the tool every day.

First of all, enabling self-service features boosts user adoption. That’s a great place to start: getting people using tools you’re adding for them.

Secondly, it helps you save time and manpower with users handling day-to-day tasks that they’re best suited for.

With Microsoft Teams, self-service means letting end users provision their own teams, use external sharing features, and authorize guest access as needed. You show them what’s expected, and then step back and let the magic begin! They can work fluidly, and you’re only a ticket away if things go sideways.

Doesn’t that sound better than building provisioning forms, waiting for hundreds of requests, and hoping someday you’ll get to inbox zero?

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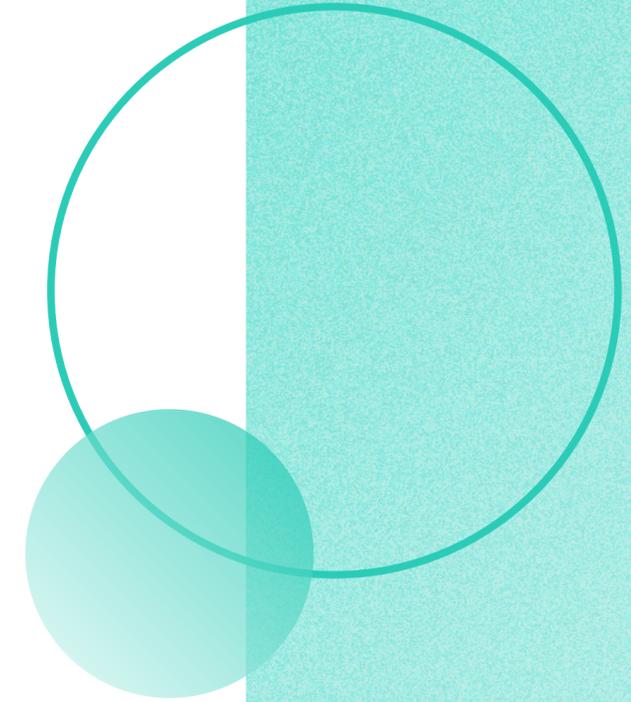
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An experimental mentality can help explain how users collaborate

Fundamentally—especially in IT—when a new technology comes out, the first inclination is to turn everything off.

"We don't understand it," "We have security concerns," or "We have governance issues that we think may apply here but... we really don't know yet, so we're going to shut it off."

I think that the number one trick is to let people use this stuff. Watch and be mindful of the fact that you're in an experimental phase. Watch the patterns of what people do.



This is how you can see what your governance ought to be, because things like Teams are a different way of working. You don't know how it's going to affect your organisation until you let people try it.

Every organisation's culture is different, so in some places you might turn on Teams and people sort of just look at it and say "Well, what are we going to use that for? We don't communicate that way" and other places people are going to go nuts.

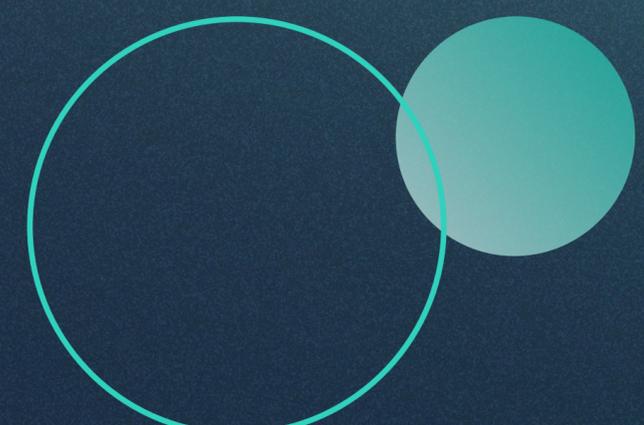
You need to see how your organisation reacts before you make decisions, and you can't make those decisions unless you let them use it first.

So, the number one trick? Don't turn it off!

Source: https://www.youtube.com/watch?v=_LWEfwtHIJc&list=PLLi2ED-wgYwb_32a3i50yq8xN_HnarSBeo&index=4

“Let people use this stuff...
you're in an
experimental phase.”

Marc D Anderson





Putting users in the driver's seat can drive digital literacy

Users who are still stuck in fixed mindsets and old working behaviors need support to evolve into new ways of thinking and collaborating. Otherwise, they'll continue to work the way they always have, just with a new tool.

As Teams is an amazing aggregator of conversations and content in the right context, it ensures that each user can access and collaborate on what is important and relevant to them.

Microsoft 365 puts their users back into the driver's seat—changing their working direction from push to pull—which leads to more thought-



fulness, more consciousness, and more autonomy, bringing the best out of people: creativity and critical thinking.

A Microsoft 365 deployment is a good inducement to drive a digital literacy initiative and transform into a forever-learning organization.

So, in fact, digital transformation is the goal and the roll out of Microsoft Teams is one puzzle tile to achieve this.

If you don't put Teams into a greater context and see the bigger picture, you won't succeed.

"Users... need support to evolve into new ways of thinking... otherwise they will work like they always have."

Luise Freese



Self-service features are an integral part of Teams

The self-service aspect of Teams is kind of like... the whole point. Or one of the major points, anyway.

Sure, you can name specific scenarios where you would want to exclude limited groups of people from this privilege—if that were really important to you. For instance, if you have some part-time contractors or volunteers coming in and out frequently.

But I find these cases to be pretty rare, and on the whole, my attitude is that your typical full-time employed information worker should be able to freely create teams, associate with others of their choosing, and collaborate at their leisure.

You know, as was the intention of the product to begin with.

“The self-service aspect of Teams is kind of like the whole point. Or one of the major points anyway...”



Restrictions can impact more than just process

In my own company, we have not restricted the creation of groups. True, this has led to some pretty crazy groups floating around out there—I think we have one that is dedicated to Foosball, for example. And yes, I probably belong to too many teams myself.

But here’s the thing: If I did work for an organization that restricted my capability to freely create and to associate with people... I would probably leave.

Not everyone feels this way, but to me it sends a subtle message: I’m not important, or that my ideas aren’t important.

“To me [restriction] sends a subtle message: I’m not important, or... maybe, some other people are more important. I hope they enjoy their highly important work... without me.”

Maybe some other people are **more important** and get to make the decisions about what important things are. Well, that’s just dandy.

I hope they enjoy their highly important work.

Without me.



Getting started with Teams

It's strange.

Most software requires you to understand its particular strengths and weaknesses to get the most out of it. Teams, however, is powered by how people collaborate—making it important to know your own company's objectives and culture.

It's less about the software, and more about you.

It's a “virtual glue” that can hold projects and departments and organizations together. It's a “window to the work”, helping people stay in touch with what their colleagues are doing. It's a “forum for improvement” where co-workers can observe the thought process that led to an outcome, and then allow feedback to improve.

At the end of the day, Teams is malleable; it can be what you need it to be.

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Try to keep things in perspective.

Ultimately, Teams is a white box where people chat. It's a space you create for people to have ongoing chats about different intent-driven projects.

Teams is not a place to store files. The files you see stored in the Files tab aren't stored there because Teams isn't capable of storing them. It's showing your team's files that are stored on your team's team site in SharePoint. Still with me?

Teams isn't some magical unicorn—it's a group chat.



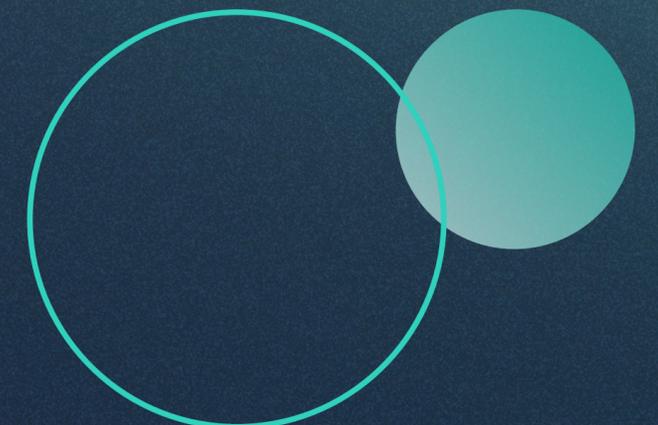
The power of Teams is that you have the chat room, and then you have the tabs at the top that allow you to see things from other parts of Microsoft 365—or outside of your tenant completely!

It allows you to grab content from whichever tool is best for the action at hand—then lets you display it right there for your team and your colleagues. People don't have to jump from SharePoint to Outlook to Wiki and back. They stay in the same tool.

Source: www.sharegate.com/blog/webinar-deploy-microsoft-teams-stay-in-control

“Teams isn't some magical unicorn—it's a group chat.”

Ben Niaulin





Understand the implications of actions before getting started

Before going to Microsoft Teams, organisations really need to stop and educate the people that are going to be using Teams.

Help them understand the implications of creating new teams.

And maybe they don't need a new team, maybe they need a new channel...

And do they really need a private channel? Do they know what happens when you create a private channel?

“Proper education is going to be key to making sure that you don't lose control...”

Proper education is going to be key to making sure that you don't lose control of your Teams environment.



Resist the urge to complicate... keep it simple

Resist the urge to do too much—keep it simple.

Too often organizations try to roll out Teams and focus on the big picture—which can lead to frustration and low user adoption.

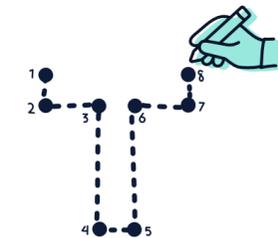
Don't overload users with significant shifts in how they work and overwhelm them with new features.

Remember: Teams is simply a tool we use to get existing jobs done, so make it easy for users to get started.

“Teams is simply a tool we use to get existing jobs done.”

Teams is all about communication and collaboration, so begin with something simple for end users: build a foundation with the familiar. We text, email, and call every day.

Teams chat takes the familiar and extends it, intuitively allowing the user to ease into Teams and grow over time.





Make sure default settings meet your default needs

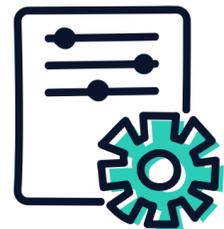
“Not all default settings are configured to what most people want.”

Creating a new tenant and starting to use Teams quickly is, especially in these times, a common practice.

But not all default settings are configured to what most people want.

A simple one, for example, is the discoverability of private teams. There is no reason to start using private teams if all users can find them and can probably extract some kind of information from the team name alone.

Take the time to configure the tenant how you want it and set a good foundation.



Look to the needs of the user

“If our starting point is understanding users... digital transformation will come [to them] naturally.”

When we look at implementing Microsoft Teams, one of the biggest mistakes we can make is looking at it as a technology improvement vs a process change.

If we get so excited about the newest tools and technologies, we can lose site of the real-life issues that will be blockers to user adoption.

If our starting point is understanding users and uncovering ways that Microsoft Teams can increase their productivity, reduce their time on tasks, and provide them more immediate information, digital transformation will come naturally to our users.

Getting to truly know your users and how they work is the best advice I would give when implementing any technology.

If you know how they work, you can easily relate how the new features will help them work better.





Consumption does not equal adoption

If users do not get training, they will create unnecessary teams and, eventually, feel overwhelmed. This is classic 'over adoption', just like we did with folders in Outlook as well as nested folders in file shares.

Don't fool yourself into thinking that if thousands of teams get created in your company you have adoption.

You are not a winner. This is not a numbers game.

Users need to have training to understand what happens in the background when a team is created or what the purpose of Microsoft Teams is and fully utilize all the features.

Otherwise, it's not fair to them.

Consumption is number of teams created. Adoption is actually "doing things right, and doing the right things."

If they're not enjoying using Microsoft Teams, belong to gazillions of unnecessary teams, and it doesn't make their lives easier—then we're doing this wrong.

Note: We have approximately 1.5 billion cars, buses, and trucks on our roads. That's consumption, NOT adoption. Believe me, many people with driver's licenses should not be driving.

#JustSaying



Source: www.tracyvanderschyff.com/2020/02/24/microsoftteams-10-things-you-should-know/

“Don't fool yourself into thinking that if thousands of teams get created... you have adoption. This is not a numbers game.”

Tracy Van Der Schyff

Good governance isn't one-size fits all

The rise of both external and internal threats—like the threat of shadow IT—means governance is one of the hottest topics in today's workplace.

So how do self-service and proper governance live together in a Teams strategy? Customizing your governance to your team's Teams needs and applying targeted policies instead of one-size-fits-all thinking seems to be a good start.

Lean on to established products and ideas. Look at SharePoint, Microsoft 365, and OneDrive best practices to inspire you and bring some interesting ideas. Set goals based on these.

But always remember, the end game is self-service. So instead of enforcing governance, help your team understand it and encourage them to live it. This is how you can rest easy at night.

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Plan governance from the inception

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Training can equal governance

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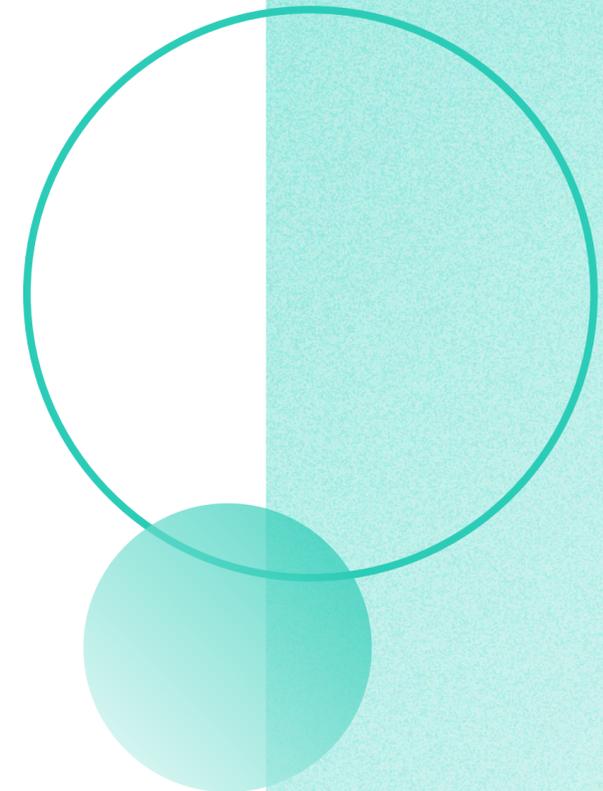
Bring in a ringer

Mark Rackley

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Governance policies provide guardrails to “self-service”

Jasper Oosterveld





Plan governance from the inception

“[If you] think of something later [when you] have hundreds or thousands of teams rolled out, it's hard to change that.”

You should start thinking about governance before you start using Microsoft Teams.

I think the most important thing would be to think about how you want to manage your Teams.

- Would you like expiration policies in place?
- Would you like information barriers?
- Would you like information management policies in place?
- Naming conventions?



So, there's a lot of governance stuff that you want to think of upfront because if you're going to think of something later while you already have hundreds or thousands of teams rolled out, it's hard to change that.

Source: https://www.youtube.com/watch?v=_LWEfwtHIJc&list=PLLi2ED-wgYwb_32a3i50yq8xN_HnarSBeo&index=4



Training can equal governance

“If we can inform people better... they can make better decisions, understand what risk is and why do we do things in this way... people will adopt and use products better.”

The best governance thing you can do before deploying Microsoft Teams is training people.

The biggest risk we have is people, so a lot of the time we think it's about “switching on settings” and it's “little sliders and buttons and things.”

A lot of time we mitigate or minimize risk if people are more informed so they can make better decisions.

So before we launch Microsoft Teams into companies, if we can inform people better so that they can make better decisions, they understand what risk is, why do we do things in this way, how does the new information architecture work, then people will adopt and use products better.

Source: www.tracyvanderschyff.com/2020/02/24/microsoftteams-10-things-you-should-know/



Bring in a ringer

"One of the keys to keeping Teams content safe and secure is to look at using a partner to help."

I think one of the keys to keeping your Teams content safe and secure and keeping things well organised—making sure you're doing it the right way—is to look at using a partner to help implement governance.

Governance is so huge!

And there are a lot of great companies out there that have great tools **cough*like ShareGate*cough** that can help you handle your Teams governance.



Learn how ShareGate can help



Governance policies provide guardrails to “self-service”

“You should definitely give people the freedom to create teams because otherwise they'll start using... shadow IT”

One of the first things you should think about is **how to manage the creation process**. Is everybody able to create teams?

I think, on one hand, you should definitely give people the freedom to create teams because otherwise they'll start using a different tool—Box or DropBox or Trello—and then you're dealing with **the threat of shadow IT**.

If you do enable self-service creation, you definitely need to have some policies in place. You need to make sure you know what each Team is for, so you should have a naming convention. Do you want to allow external access? Do you want to use expiration policies?

You can create and enforce policies manually, or you could set automated governance policies with a third-party tool. Either way, if you open up teams creation to everybody, make sure you have those governance plans in place so things don't get out of control.



Source: <https://sharegate.com/blog/it-governance-best-practices-how-to-use-microsoft-teams-for-collaboration#future>

Make all users guards of the Teams ecosystem

With Microsoft 365 groups and modern SharePoint team sites being created at a record pace, how can you keep all of that content secured, protected, and retained?

The integrated nature of Microsoft 365's productivity suite means you need to think about setting rules that can apply to multiple products at once—to protect your Teams work across Microsoft 365, you need to create a cross-product governance strategy that keeps your content secure across platforms and devices.

Teams is really just a way to link multiple tools, so the security of Teams also relies on the settings of each underlying software program. Think about how SharePoint, OneDrive, Azure Active Directory, etc. all feed what's happening in Teams.

In this fortress, it's not just Teams... there are multiple keys to the castle to worry about.

Long story short: Protecting Teams content means a better understanding of your entire Microsoft ecosystem.

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Open authentic dialogues
Sarah Haase

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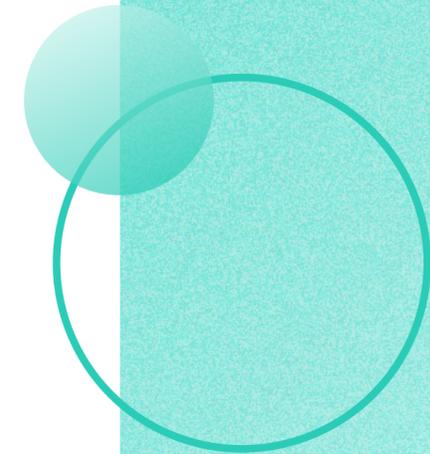
Education is the first step
in risk avoidance
Marc D Anderson

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Security is a team effort
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Go multi-factor authentication, go!
Rick Van Rousset





Open authentic dialogues

“[Have] authentic conversations with users about data security and data classification.”

The single best practice that we have to think about to keep our Teams content safe and secure is to make sure we're having authentic conversations with our users about data security and data classification.

Whether that data is being stored in Teams or SharePoint—no matter where it is—Microsoft Graph has the ability to expose it throughout Microsoft 365, so we need to make sure that:

- a) Data is secured appropriately,
- b) That our users understand what the difference is between a private channel and a public channel, and;
- c) What kind of things should be safeguarded for only a few people to access vs what can be open to the entire company.



Education is the first step in risk avoidance

“The tools are there to protect the jewels.”

Security is always a big topic for any IT department these days. If you look at it with the glass-half-empty perspective, there are so many attack vectors, there are so many different ways—in theory—to have someone come in and get your stuff.

Thinking about the security of what you put into Teams, or any other part of Microsoft 365 really... is to think about how to educate your end users about what matters.

Most leaks that I hear about... that really made a difference, that were very screwy... the technology was not the problem, it was the people that made a mistake.

I think most of the time the education of the user base is through sort of a threat perspective as opposed to "here's how and why it's important for us to protect our stuff."

Don't be another brick in the wall: Avoid fear.

Think about how you can educate people without scaring them.

The tools are there to protect the jewels, but you have to make sure you show how to use them.





Security is a team effort

One way to address competing demands and requirements is to leverage a shared responsibility model—a cloud security framework that defines security obligations to ensure accountability.

Microsoft's shared responsibility models says that you as an organization are responsible for protecting your data and identifying all devices with access. And Microsoft is responsible for protecting the Microsoft 365 services. Together, you can protect your sensitive data from security threats.

To get your electronic house in order, so to speak, a coordinated effort is required and involves three key groups:

1. Business information workers: These are the people creating the content, sharing with external parties, and some of them are working with sensitive information. This group really needs to know how to work safely and securely in the modern work place today—if they don't then IT needs to teach them.
2. IT teams: They control the resources that implement the technical controls involved as well as some of the training and configuration.
3. Legal, risk, compliance, governance teams: These are the regulatory teams you need to help you define a classification system across your tenant. They're in a unique position to understand what you need to do to protect data and remain compliant—lean into them, and bring them in from the start.

Source: <https://sharegate.com/blog/protect-teams-work-office-365-security-compliance-microsoft-teams#collaborating-securely>

“How do you keep up with all of this? Leverage AI and automation & have [a] governance strategy for security [in place].”

Joanne Klein



Go multi-factor authentication, go!

This setting is still not turned on by default, but it is really your first line of defense against phishing attacks.

Lately, there have been too many cases of people who receive a real email from Microsoft from somebody sharing a document from their OneDrive. But this is coming from an already compromised account.

What these people with less good intentions have done is upload a scam file to the compromised account which includes a link to a fake Microsoft 365 login page. Then they share that OneDrive file to everybody in the compromised account's contacts list.

“Step in early and turn on multi-factor authentication [by] default.”

Because the email and the OneDrive are real, people trust their contact, do not see is that the final login page isn't a genuine one, and then their account gets compromised, and the story repeats itself.

Step in early and turn on multi-factor authentication as your organisation's default. It might add a few seconds of work for everyone, but when users land on a phishing page, you'll have that added line of protection that'll save a lot of time and effort.



“Step in early and turn on multi-factor authentication [by] default.”

Rick Van Roussett

Sharing is caring

In today's digital workplaces, sharing content is an important piece of the collaboration puzzle—especially when working with clients, vendors, or anyone else outside your organization. But how can you make sure Teams content stays secure without limiting productivity?

While some Microsoft 365 administrators think it's safer to disable external sharing entirely, this can actually end up making the problem worse.

The business landscape is changing, and today's workers are accustomed to more freedom and flexibility with the way they do their work—both internally and externally. If they can't do what they need to with IT-approved tools, they'll turn to other solutions that you don't know about—and that means you have a “shadow IT” problem.

Even if external sharing and guest access are turned on, you still need a strategy in place to govern their use. Having the right settings and policies ensures that employees use the tool correctly and keeps sensitive data secure.

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Define why you're sharing
in the first place

Jasper Oosterveld

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Start at the team level

Maarten Eekels

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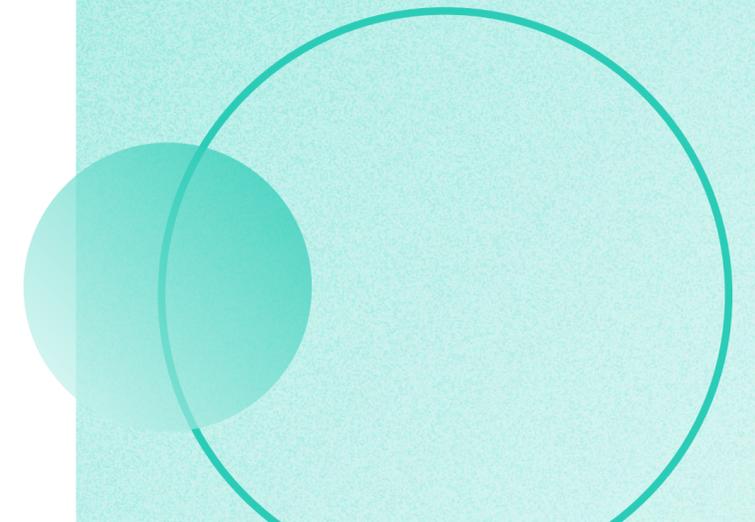
It's all in the name

Rick Van Rousset

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Let someone handle
the heavy lifting

ShareGate





Define why you're sharing in the first place

Are you going to allow people within a team to invite guests? I definitely think that you should, because if you don't, they'll find a different way—they'll send an email with attachments or they'll start to use a different tool—and that's something you're trying to avoid.

You need to think about **how to secure external file sharing** before you rollout Teams.

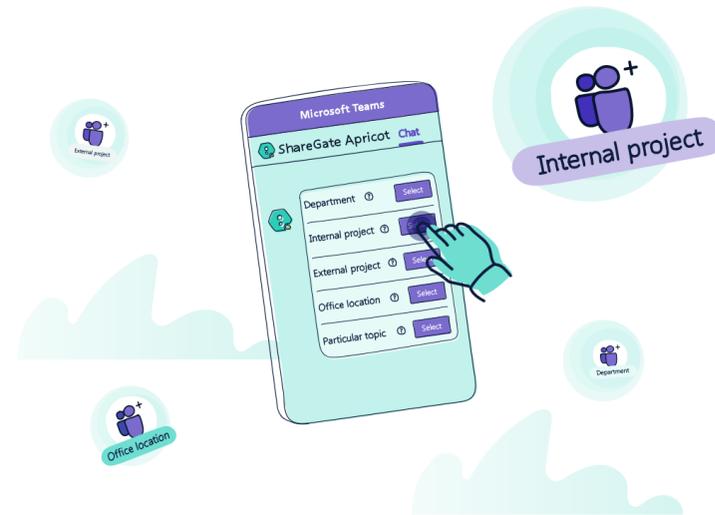
So, when I talk to customers, I ask: "What is the purpose of this team? Is it only for an internal

department?" Because in that case, I don't think you really need to collaborate externally. That team probably contains a lot of sensitive content that you don't want to be shared.

If you create a team for a project, where people might need to collaborate externally, you definitely want to enable external sharing—but make sure you have a clearly defined policy around it.

For example, you could allow that team to invite guests if they need to work on a project, and if you create a team for a department you could turn external sharing off.

Source: <https://sharegate.com/blog/it-governance-best-practices-how-to-use-microsoft-teams-for-collaboration#future>



“Is [this team] only for an internal department? Because in that case, I don't think you really need to collaborate externally.”

Jasper Oosterveld



Start at the team level

What a lot of people don't know is that when you enable guest access on a tenant level, that guest access, by default, is enabled for all the teams you already have in your environment.

The only place where you can change that is with PowerShell.

Make sure that when you start to use guest access in your tenant, you look at your existing teams and disable it at the team level, where it's necessary.

For example, an HR team or a legal team, you don't want guest users in those kinds of teams. So, disable it there before you enable it on a tenant level.

“Disable it [at the team] before you enable it [at the] tenant level.”



It's all in the name

When you create different teams for external sharing, you should make it very distinctive, either in naming or with something else that indicates a team is shared externally.

This way, you minimize the “I uploaded the file to the wrong team” mistake.

Which can have significant implications.

Another tactic before you start with external sharing is to create a plan of attack for sharing concerns:

What can you, as a company, afford to share externally by human error, and what not?

“Not all default settings are configured to what most people want.”

Then set your settings accordingly.

You have no idea in how many tenants my account is a guest account.

A simple SharePoint search for my name reveals a lot of information about me that I am not supposed to know.





Let someone handle the heavy lifting

Should those budget spreadsheets still be shared with your organization's former accounting firm? Who still has access to last quarter's user research reports? Even with all the right settings configured, securing content is a whole lot easier when you can see everything that's been shared externally.

In order to protect your sensitive content on an ongoing basis, you need to understand where it lives, what users are doing with it, and why it may be at risk. That's why you should regularly review what's been shared externally and with whom. Here are three ways to review external access in Microsoft Teams:

STEP 1



1. Manually review a list of guest users in Microsoft Teams
2. Manually review sharing links for each team's SharePoint site
3. Schedule automatic external sharing reviews

Sure, you can go with numbers 1 or 2 to review what's been shared and who has access manually.

But that could be a full-time job in and of itself, so we don't recommend it.

Even if your owners complete the reviews when you tell them to (and they won't; it's a tedious task to undertake), you'll still need to log any changes.

The truth is: there's simply no easy way to manually review external access for each of your teams using out-of-the-box solutions. **However, feel free to read our alternate proposals in our [Sharing is Caring eBook](#).**

“The truth is: there's simply no easy way to manually review external access out-of-the-box.”

ShareGate:

Make Teams everyone's favorite tool with ShareGate:



[Discover ShareGate](#)

*Manage Office 365 Groups and Microsoft Teams
Ensure external users have access to the right things*

As an IT professional, you want users to love and adopt Microsoft Teams—and keeping self-service features enabled is a can't-miss way to combat shadow IT and boost user adoption.

But while Teams is surprisingly easy to use, it's also easy to use it improperly. Without a bit of guidance, you can end up with duplicate teams, multiplying Microsoft 365 apps, and tons of files shared externally.

So how should admins go about deploying self-service for Microsoft 365 Groups and Microsoft Teams? Is there an easy way to deal with the management challenges that come with greater user freedom without hindering productivity?

ShareGate's got your back.

We built ShareGate, our automated governance platform, to help you guide users towards secure and productive collaboration in Microsoft Teams. Get the visibility you need to keep Teams on track and ensure external users have access to the right things. And entrust owners to make simple decisions about archiving and external sharing links on behalf of their team.

- Get full visibility across each team's lifecycle—from creation all the way through to archival
- Automate manual tasks involved in identifying problem areas, like inactive or orphaned teams
- Collaborate with team owners on corrective measures to keep your Teams tidy and secure

The secret to effective Microsoft Teams governance isn't about limiting what users can create; it's about empowering them to do their part in keeping your environment organized and secure.

Simple as that.

Simple as ShareGate

ShareGate: