

Enable your team with Microsoft Lists

Your smart information tracking app in Microsoft 365

Daniel Glenn and Shafina Hassam





Agenda

- Intro to Lists
- Easily create, share, and track lists
- Rules and quick edits
- Customize your lists
- Demos!

Who we are

Daniel Glenn

- Collaboration Practice Lead @ InfoWorks, Inc.
 - Microsoft MVP & Podcaster 365MCS.com
 - 80% humor, 100% Southern

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Shafina Hassam

- Modern Workplace Manager @ BDO Canada
- Retired world traveler
- Active bed to desk commuter

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There's a LOT of information to keep track of



98%

Of global information workers communicate or collaborate with one or more colleagues.¹

28%

Of a global information workers day spent, on average, creating, reading, or searching for information related to their job.²

4 hours

Of time information workers saved per week from improved collaboration and information sharing.³

¹ Source: Forrester Analytics Global Business Technographics Workforce Benchmark Recontact Survey, 2019.

² Forrester, Content Services Are Foundational For Employee And Customer Experiences: Look Ahead To 2025 / Cheryl McKinnon / July 13, 2020

³ The Total Economic Impact™ Of Microsoft Teams, a commissioned study conducted by Forrester Consulting on behalf of Microsoft, April 2019::

<https://www.microsoft.com/en-us/microsoft-365/blog/wp-content/uploads/sites/2/2019/04/Total-Economic-Impact-Microsoft-Teams.pdf>

Embrace a new way of work with Microsoft 365

Content easily and safely shared

Access & work on files from anywhere
Track with activity & notifications

Information helps your workflow

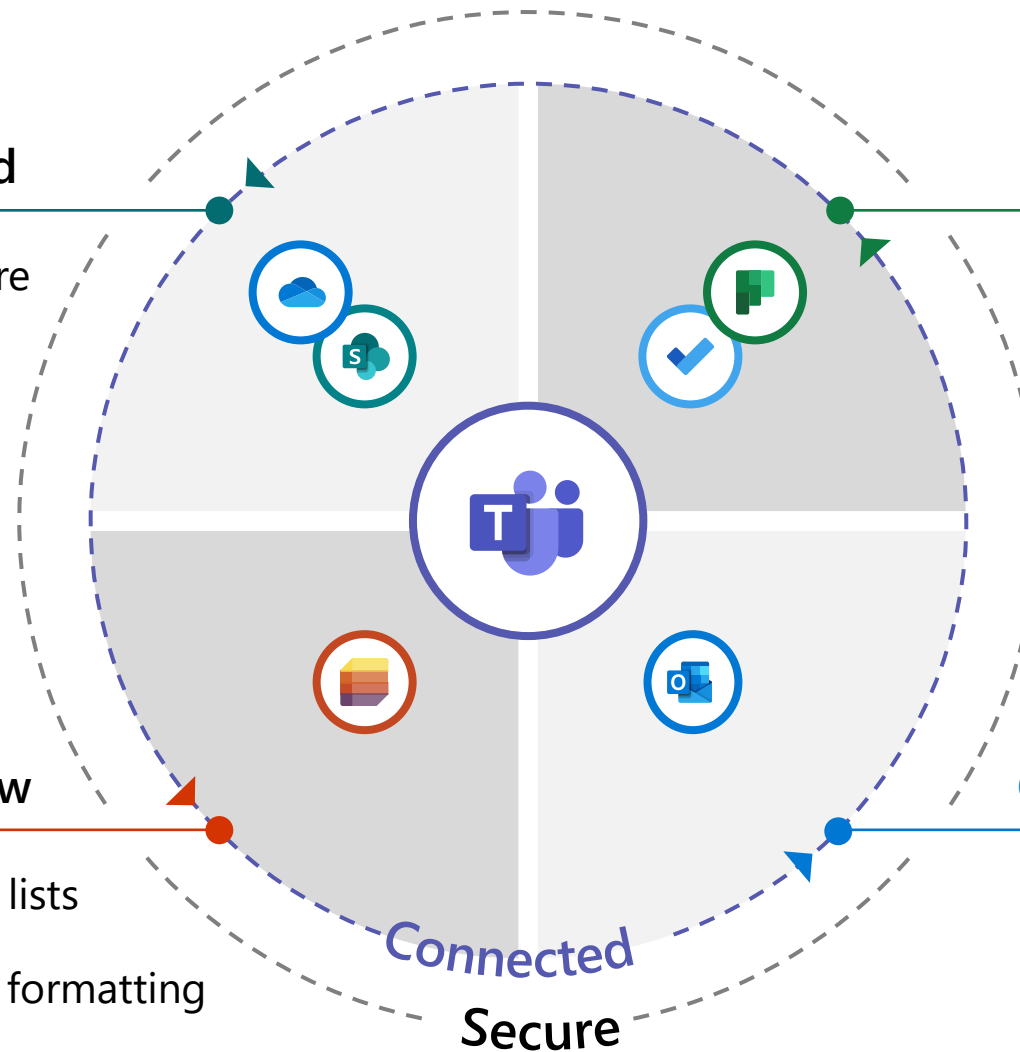
Organize work into simple, powerful lists
Track with rules, views & conditional formatting

Tasks are managed across apps

Drive team & personal accountability
Create and assign tasks

Communications are in one place

Coordinate over chat, audio, video
Quickly schedule and attend meetings



Track what matters most with Microsoft Lists



Simple

Easily create, share, and track lists with anyone, on any device



Smart

Keep everyone in sync with rules and quick edits



Flexible

Customize your lists for whatever your business needs





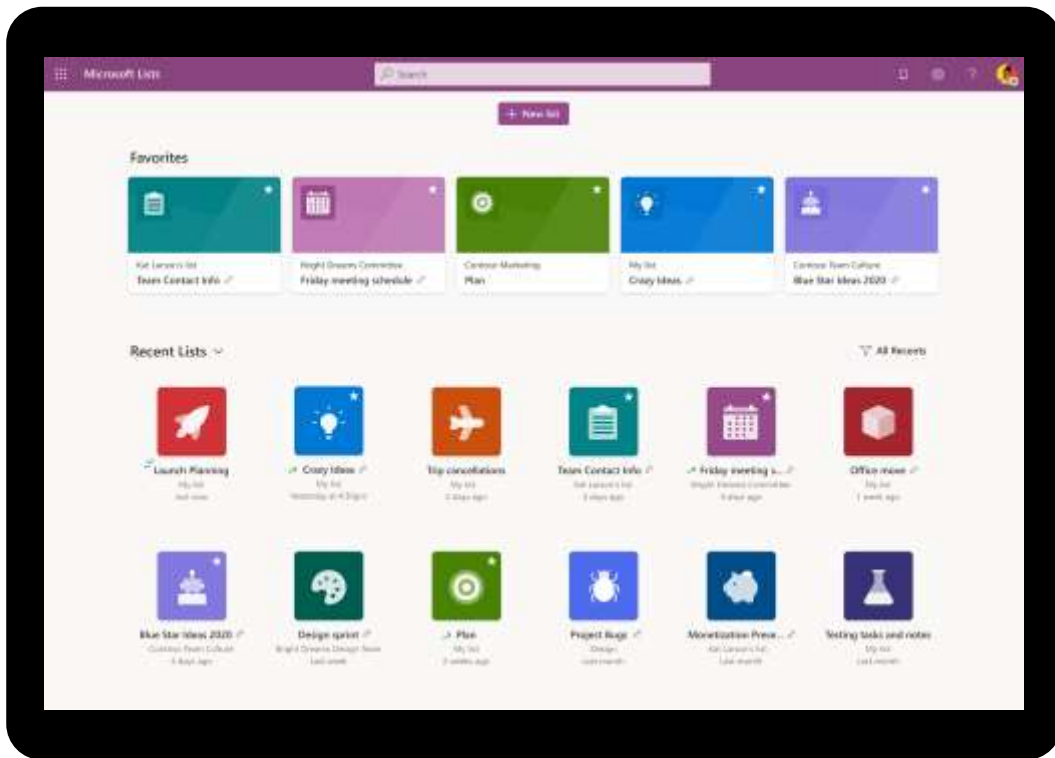
Simple

Easily create, share, and track lists
with anyone, on any device

Smart

Flexible

Create a new list and share it with colleagues



- Start from anywhere:
 - Lists app
 - Import a data table from Excel
 - Lists app in Teams
 - SharePoint
- Track issues, assets, activities and more
- Configure and refine with:
 - Filters and views
 - Color formatting
 - Ready-made templates

Jumpstart your new list using ready-made templates

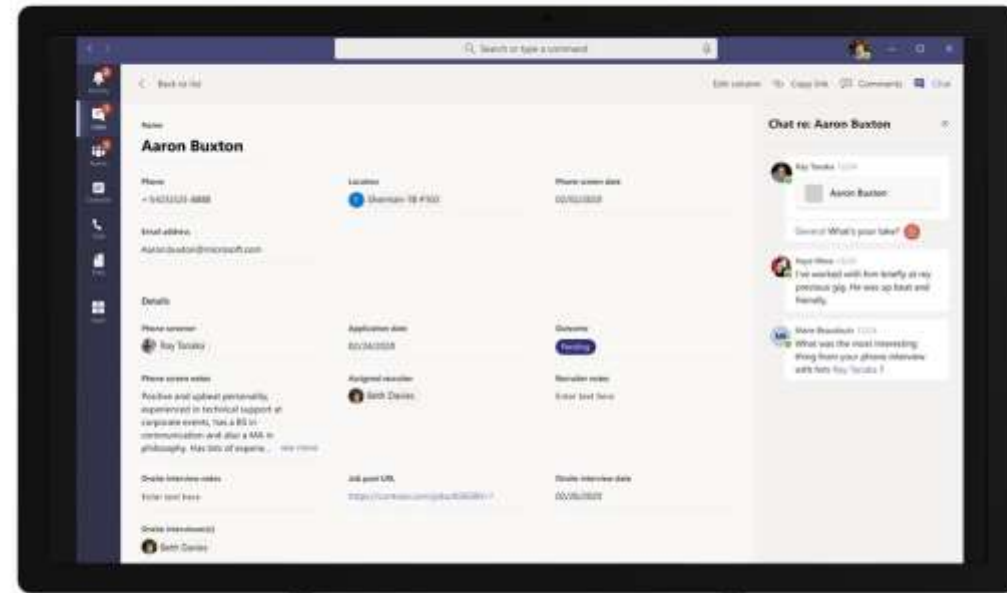
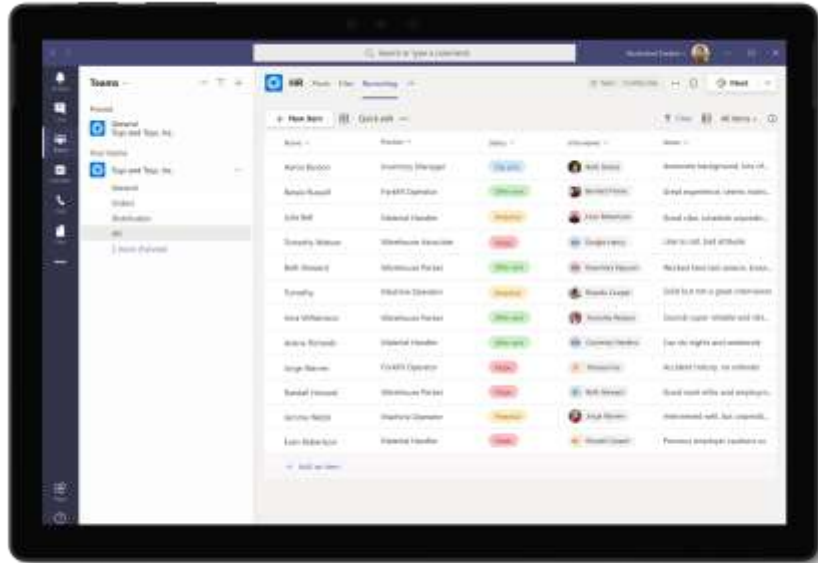


Start with a ready-made template

- Issue tracker
- Employee onboarding
- Event itinerary
- Asset manager
- Recruitment tracker
- Travel requests
- Work progress tracker
- Content scheduler

- Issue tracker: bring issues to a close by setting priorities and sending notifications
- Event itinerary: organize event details in one place and show as a calendar view
- Asset manager: track physical assets' location, status, users, etc.

Start and use a list from within in Microsoft Teams



- Create new or bring in existing
- Start from a ready-made template
- Chat, @mention, and collaborate
- Share individual list items



Demo:

Lists home & create new

Microsoft Teams  Microsoft Lists



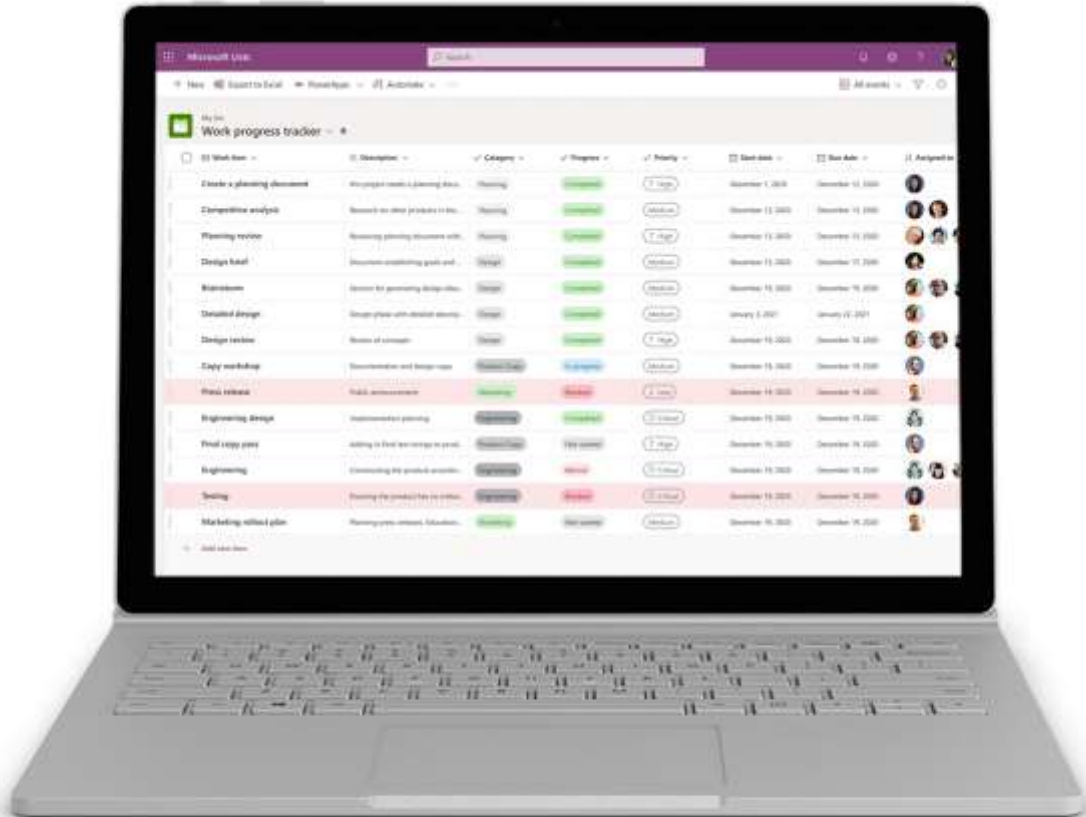
Simple

Smart

Keep everyone in sync with rules
and quick edits

Flexible

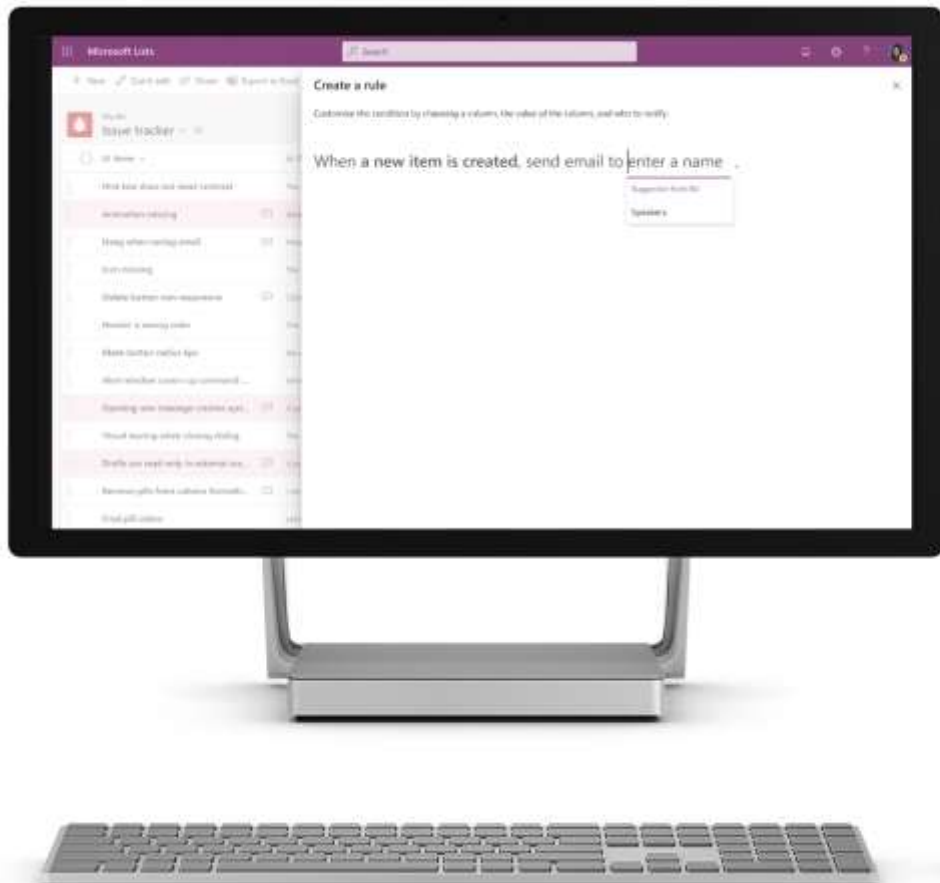
Your lists just got a whole lot smarter



Do more, work smarter:

- Quick Edit provides bulk edit operations
- Conditional formatting highlights data and focuses attention
- Rules and notifications keep everyone informed

Surface important information using rules and notifications



Set rules to stay up-to-date on list progress

Turn on notifications for when an item is:

- Created
- Modified
- Deleted

Assign notifications to specific recipients

Demo:
Quick Edits, Lists rules, and
Conditional formatting

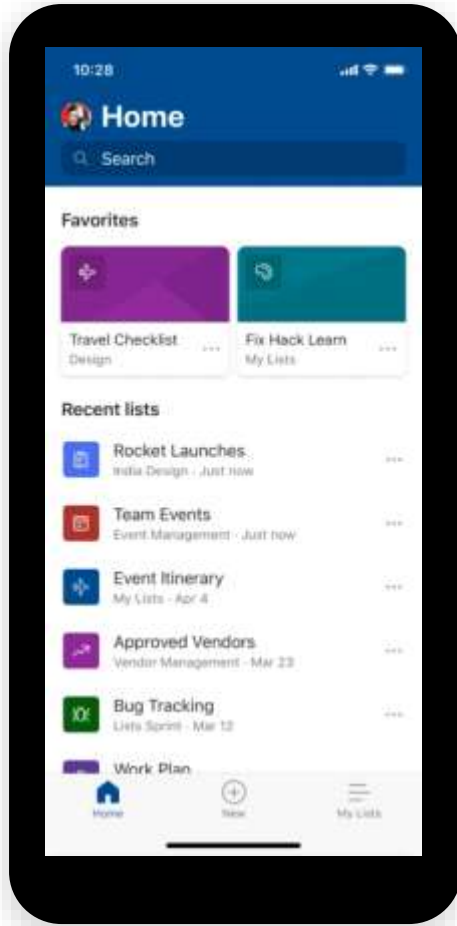


Simple

Smart

Flexible
Customize your lists for whatever
your business needs

Check your list anywhere with the Lists mobile app



- The full power of Microsoft Lists - in your pocket
- Access all your recent and favorited lists
- Create new lists using ready-made templates
- Adjust columns, edit list items, and share as links
- Availability update
 - iOS (available now: aka.ms/MLists/app/iOS)
 - Android (coming later in 2021) [roadmap ID: 70704]

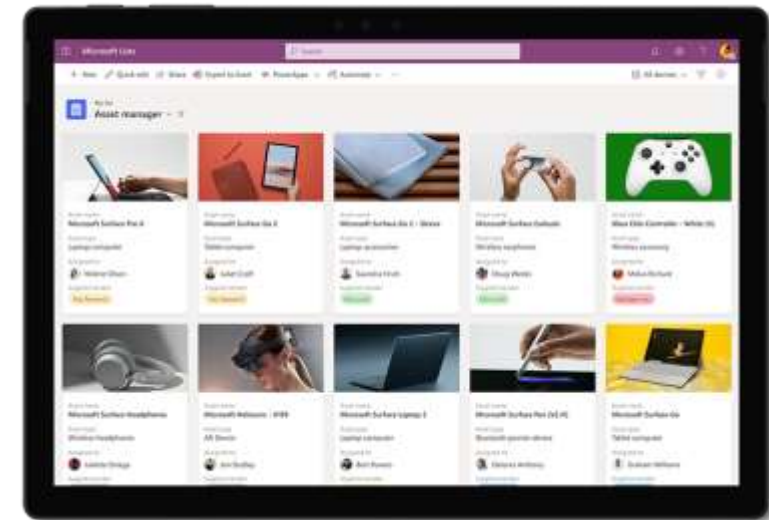
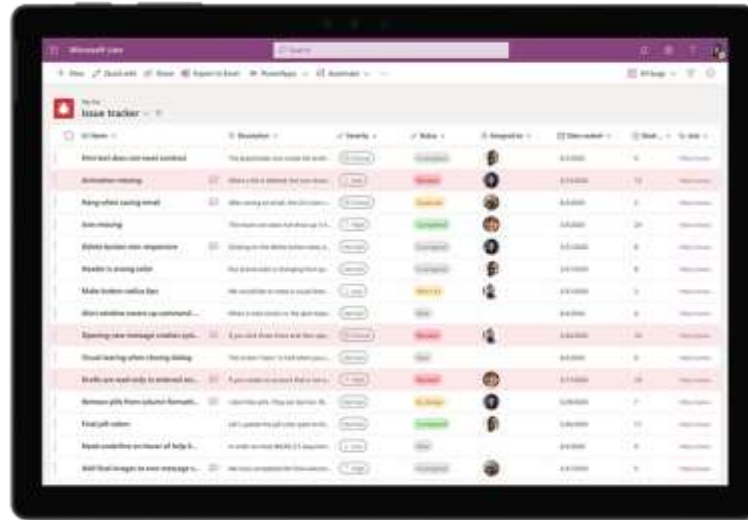
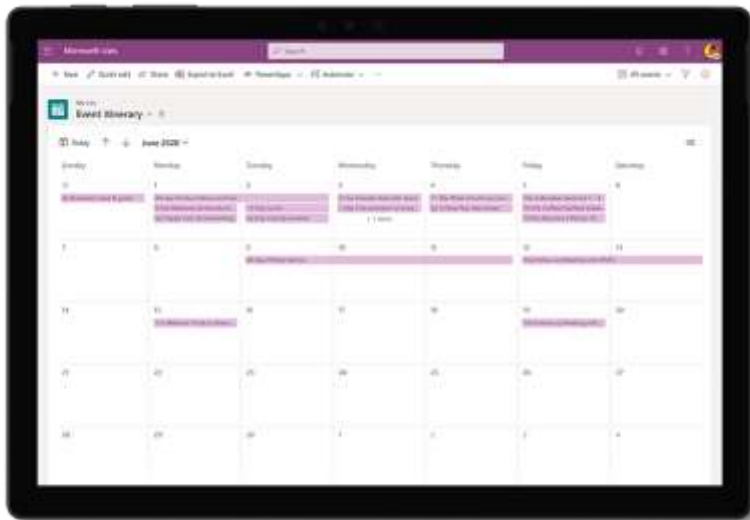
Personalize your list with a few clicks

Default views help visualize your information:

- Calendar
- Grid
- Gallery

Configurable formatting, views and forms promote your data with personality:

- Conditional formatting
- Show/hide filters
- Header and footer customization



Demo:
Mobile access

Views and forms

Resources

Resource center

aka.ms/MLists

Blog

aka.ms/MLists/GA/blog

Demo video

aka.ms/MLists/demo-video

Thank you!



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