



# ERG DAILY WORKPLACE SETUP

The daily activity of the ERG requires you to have a suitable workplace to cover various aspects the work of your group including:

- internal communication
- setup of recurring meetings
- calendar and event's tracking
- shared workspace to create and share file project management tools

Depending on the organization, your ERGs may use different tools already available for free. We will cover here one of the most common ones - **MsTeams**. There are other team collaboration tools available on the market e.g. Slack, Basecamp. No matter which one you will select, it will limit unnecessary emails, enable you to create a centralized knowledge center, and facilitate a two-way flow of information. It will help you to manage projects better and increase your efficiency and productivity.

## Microsoft Teams (MsTeams)

Microsoft Teams is a communication platform that includes a chat, a virtual meeting place, and a workspace. It is a part of Office 365. You can use it not only to keep in touch with colleagues via chat or a video conference, but it is also a platform for independent or team work where you collect files and organize the work of your group.

The Teams helps you coordinate projects and tasks, update their status, make decisions together with your team, and co-author and collaborate across files simultaneously.

## Internal communication - Team

A team in Microsoft Teams is a group of people focused on a specific project, task, or department in an organization. Setting one for your ERG is really helpful. As part of the created Team, your members can talk to each other, share files,

notes and edit documents together. It is good practice to develop a channel structure for the Team which includes the thematic groups for example, ERG projects to be run.

### TIP:

If you want to restrict all documents and communication sent on the team - you need to create the team as a private group.



## Internal communication - Conversations (Chats)

This functionality is commonly used in daily work and allows you to be in constant touch with your members. It helps quickly gather required information and it builds the framework for open communication within the group. ERG is definitely less structured than a regular business team and all the activity is voluntary. It helps to set up spontaneous and easy to follow communication channels.



## Recurring meetings setup - (Conference) calls within the ERG

This functionality allows to schedule regular calls for the ERG that support performing its goals and tasks.

## Calendar

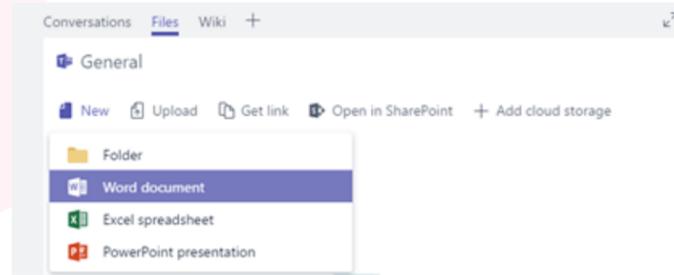
This is a great option to schedule various aspects of the ERG activity including meetings, events planned, or important dates for the group. The calendar supports start year planning, shows at the glance the peak periods for the group, and manages the dates of ad hoc initiatives.

## Events tracking

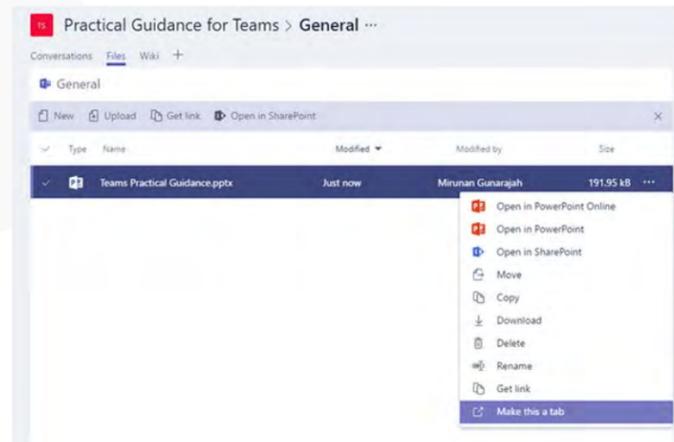
MS teams will allow you to include the Events Tracker as a regular excel document uploaded to the team's files tab. We have a separate tool you can use as a template (see **Tool: ERG activities tracker**). Adapt it to your needs and use it regularly with your group.



**Shared workspace: creating and sharing your files**  
Use this function to create, upload, and share your files with every member of the Team.



You can also share a specific content like a web page or a document/tool and make it visible as a customized tab. It will be useful for members to have some resources easily accessible at hand. You could include websites of nonprofit organizations you cooperate with or ERGs Center.

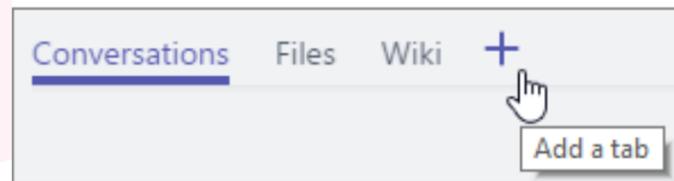


**Project management tools - Planner \*tasks to be scheduled**

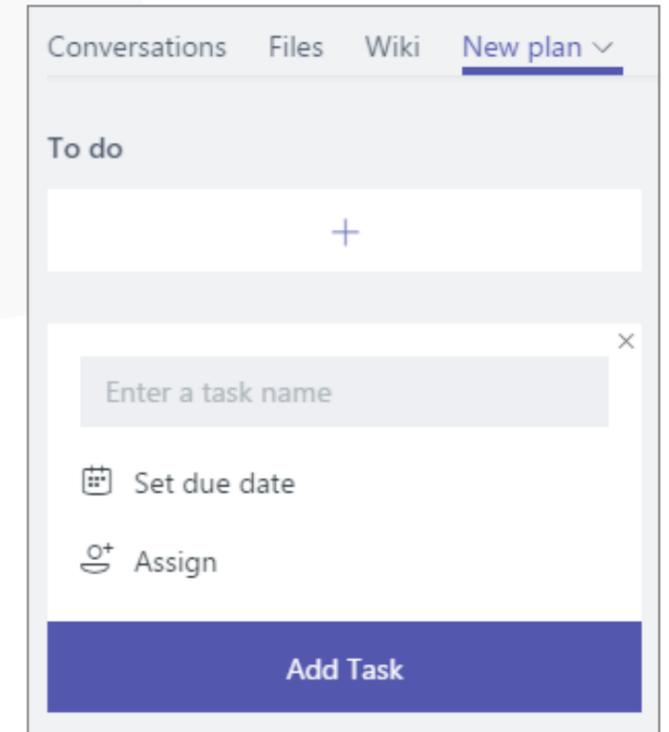
You can organize tasks for your ERG by adding one or more Planner tabs to the team feed. It will help you manage your projects. How to do that?

The tab will be added alongside your other team channel tabs, and you'll be able to start adding tasks to your board.

In your team channel, select **Add a tab +**.



Then you can work on your plan, schedule the tasks, due dates, and assign them to the person responsible.



For more detailed information and technical support – please visit <https://support.microsoft.com/en-us/teams>

