FILE SHARING WITH CUSTOMERS FROM TEAMS & SHAREPOINT ONLINE BY AN ENTERPRISE SOFTWARE SOLUTION PROVIDER
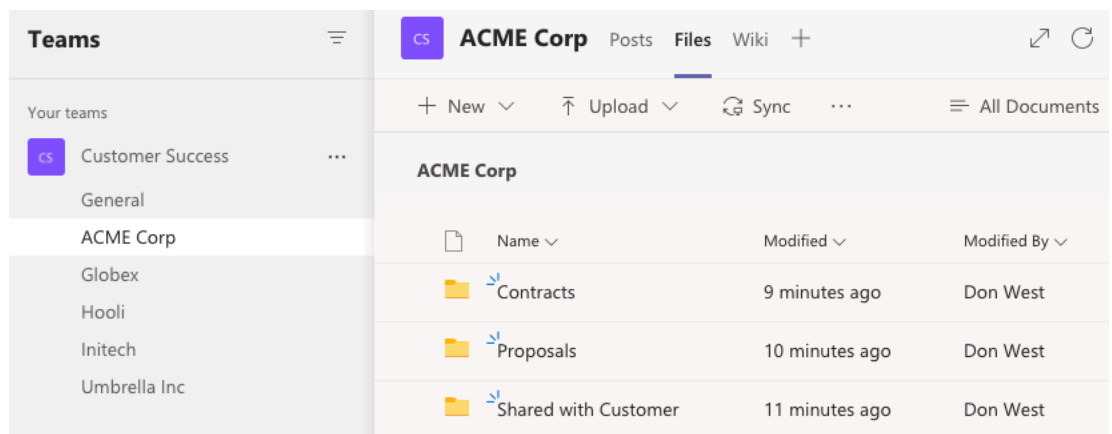
Like many organizations, this provider of enterprise software solutions has deployed Microsoft Teams to improve its ability to collaborate internally and engage customers through video conferencing. Not having had a team-based collaboration or messaging system already in place (e.g., Skype), the results have been transformative, especially given the workforce dislocation brought about by the COVID-19 pandemic.

Despite these gains, the company knew it was under-utilizing Teams and that more productivity improvement could be realized, especially with regard to collaboration with outside parties, principally the company's customers. After an investigation into its existing customer collaboration workflows, the company determined that file sharing was a ripe area for productivity gains.

In considering how best to enable file sharing with customers using Teams, the company quickly confronted the all-or-nothing nature of Guest Access to Teams. More specifically, the fact that Guests would have access to the entire Team they were invited to join, not a specific channel. Because the company had already set up individual Teams channels to support internal communications and file sharing specific to each customer, it was not possible using Guest Access to limit the sharing of existing files/folders to a specific customer.

Re-structuring their implementation of Teams to accommodate this limitation of Guest Access was considered (e.g., a Private Channel or a Team site per customer), but it was rejected due to high change management cost. And consideration was given to waiting on Microsoft's upcoming Shared Channel capability, but this would also require re-structuring and, more disqualifying, would require the customer to have a federated O365 tenant.

The company found a solution in e-Share, which allows specific folders within existing Teams channels to be shared with its customers. Their practice is to create within each customer-specific Teams channel a folder called "Shared with Customer". It is this folder and its contents that is shared with the customer. Though anyone that is able to access the Teams channel can initiate this "Trusted Sharing" with the customer using e-Share, the responsibility typically falls upon the Customer Success Manager (CSM). Within the e-Share web portal (see the provided screenshot), the CSM navigates to the SharePoint site associated with the relevant Teams channel and creates the Trusted Share. The customer email address is input and a sharing policy selected.

While the customer accesses shared files through an easy-to-use and company-branded web portal provisioned by e-Share, the company's internal users continue to create content and access files shared with the customer using the native Teams interface. This includes accessing files uploaded by the customer into the Trusted Share, which the internal user sees as files within the "Shared with Customer" within the Teams. Allowing internal users to stay within Teams when sharing files with customers was a key factor in deciding to deploy e-Share.

Other deciding factors were:

- No new teams or channels needed to be created to compartmentalize files to be shared with customers.

- No Guest accounts or Microsoft accounts of any kind are required of the customer.

- There is only one copy of the shared files, simplifying version management and avoiding confusion.

- Modern collaboration with customers is now possible, including the co-authoring and redlining of documents.

- Email notifications are sent to both internal and external participants when the contents of the Trusted Share have changed, keeping team members on task and always informed.

- Customers are always able to access the shared files, even when their organizaton would otherwise block access to SharePoint Online links, as highly regulated businesses, government organizations, and the Great Firewall of China often do.

- A company branded UX is presented to customers, instilling trust and building the company's brand.
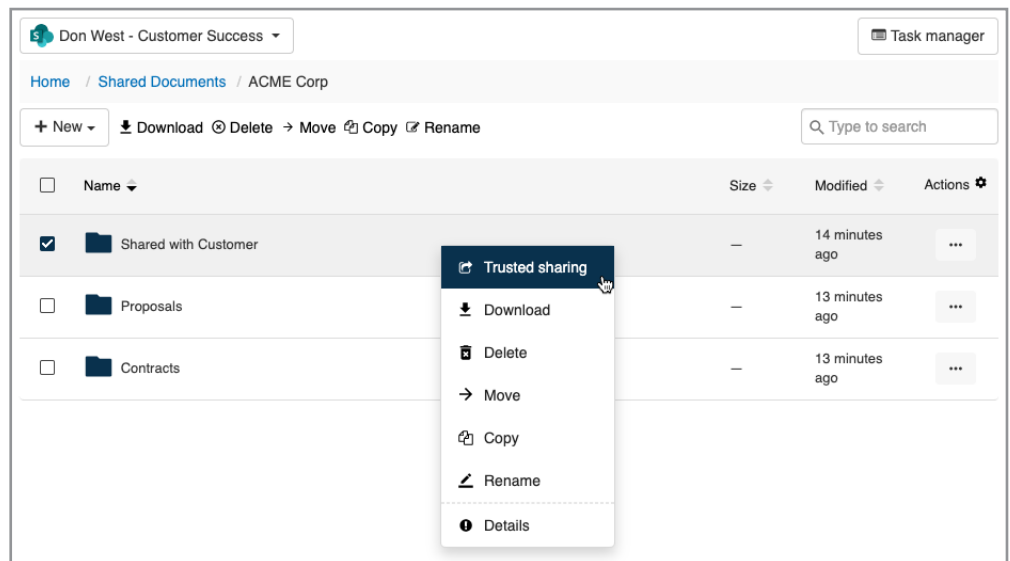
e-Share was deployed and configured by the company's IT team within 2 hours, including SSO integration and custom branding. The amount of change management required was minimal, especially in light of the productivity benefits obtained.

The company reports that both its internal users and customers are very satisfied with the productivity improvements made possible by e-Share.