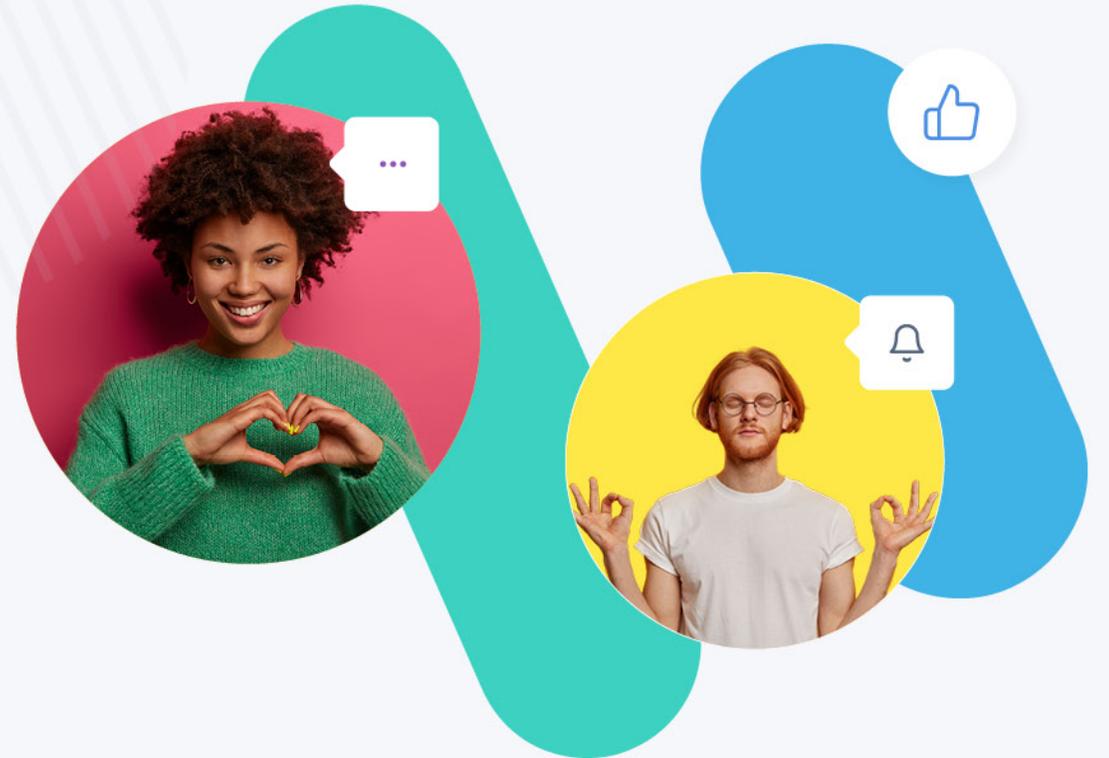# Admin Guide to Teams

Workvivo Guides

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What Are Teams?

In Workvivo, teams are used to **group areas of the organization** and allow **targeted communications** to specific audiences. Teams are visible under **user profile and in the Teams directory**. Team information would typically come from an Active Directory or HR System – for example data such as locations, departments, divisions, levels, etc.

All teams must fit within a Category or Type. There is **no hierarchy** to the different categories/types.

All employees should be a member of **one team within each category/type**. It is possible for a given employee to be a member of no teams of a given type if necessary. It is recommended to have at least department and location types.

What To Consider When Defining Teams

- **Who is the audience of your targeted communication?**

Teams can be selected as an audience for posts, shout-outs/kudos, articles and value/goal updates; therefore, it is important to consider what level of team will meet your communications requirement. Are high level departments sufficient or will you need to drill down to smaller subdivisions to achieve the necessary readership?

- **At what level do you want to set visibility of Apps/Documents/Links/Articles?**

Teams are used to set rules for who can see specific links, files, or folders in the Apps and Documents sections. If this is a feature you want to leverage, it is important to consider how you plan to set those permissions i.e., is it based on Location/Department/Division/Level/etc?

- **How can you reduce admin overhead of managing Spaces?**

Default spaces are assigned using teams. This is something to consider when setting up your team structure. Auto-enrolling space members via default spaces is one of the quickest ways to set up a new Space.

- **How do you plan on running Pulse Surveys and Awards?**

The audiences for both Pulse Surveys and Awards can be defined based on teams. If you plan on using surveys or awards in a targeted way, it is important that your team setup can facilitate those plans.

- **How do you want to use the rewards feature?**

If you want to be able to give targeted recognition to specific teams within the organization, then depending on the size of the organization only having departments available in Workvivo might not be sufficient. Note that while it is possible to select multiple individuals for a shout-out, if there are more than a dozen or so in the team this can be time consuming, and you don't want to leave someone out!

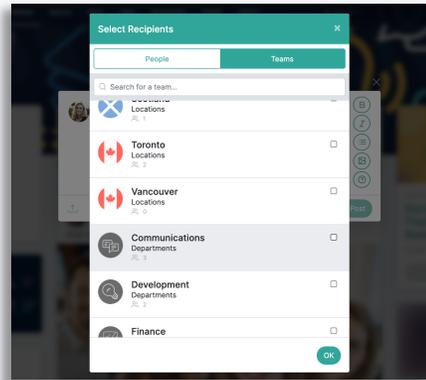- **How do you want to use the tag/mention a Team feature?**

This feature is useful for notifying a group of a specific post or drawing their attention to certain content. If your departments have large amounts of employees and there is no smaller breakdown of teams then this feature will not be as effective.
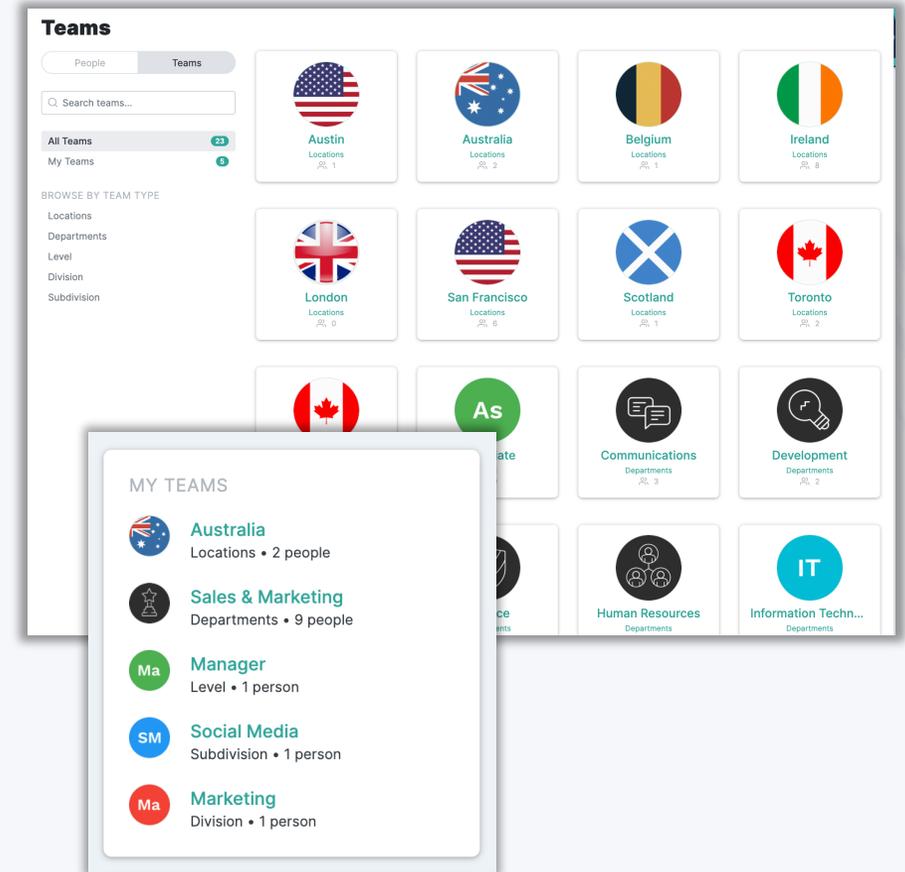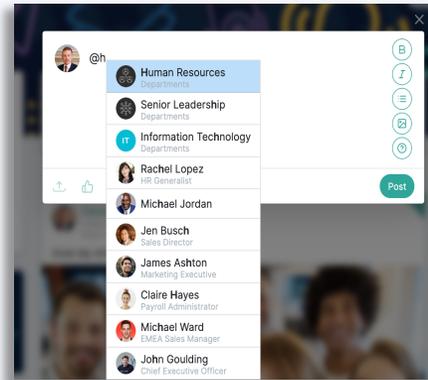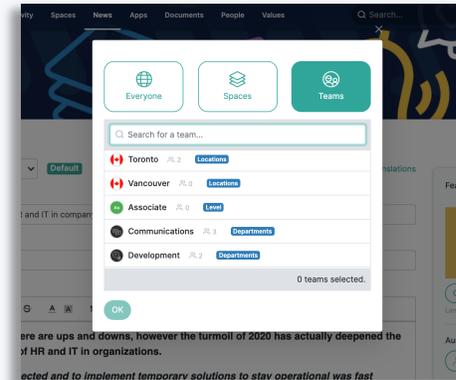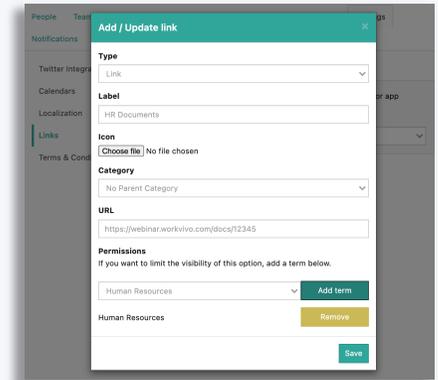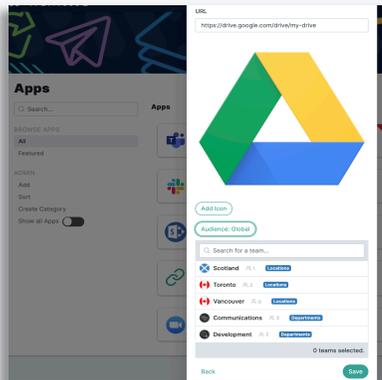
What Areas Do Teams Impact?
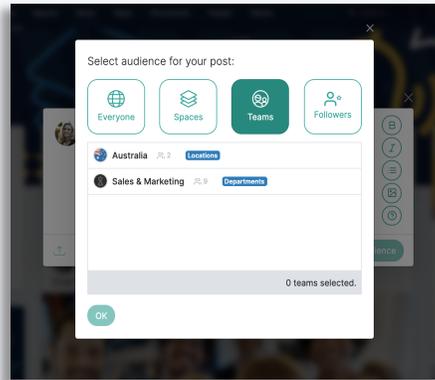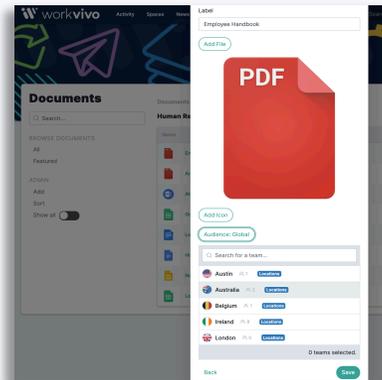

Post Audience

Shout-outs/Kudos

@ Mentions/Tags

Articles

Quick Links

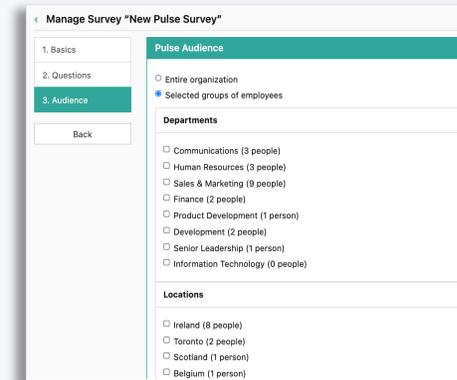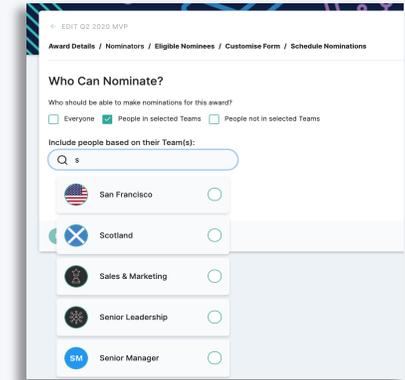**Apps**

Documents
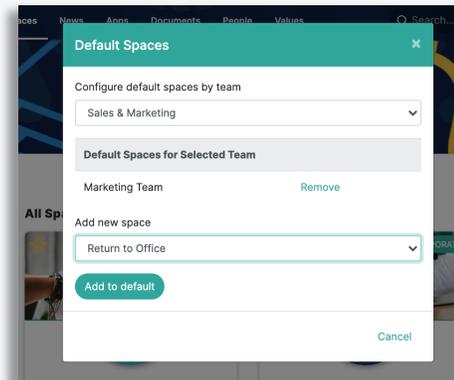
Default Spaces

Pulse Surveys

Awards

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Best Practices For Defining Teams

- **Focus on how teams are used in the platform,** not how many ways the organization can be divided up

- **Use the information you already have** in your Active Directory/HR System/other internal systems. If you need to update this information for it to be usable, try to do this before launch

- Make sure your team **names are easy to read and intuitive**

- Avoid having teams of 1/2, **teams should have a minimum of 5 members** where possible (in most cases this number will be significantly higher)

- If your departments have 100+ people, it is recommended to add another team category/type to further **break down the departments into divisions/sub-departments**

- **Commonly used Team Types:**

  - Department/Function

  - Location/Office

  - Division/Subdivision

  - Level/Grade

  - FTE/Contractor

Your entire company in one place

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