

Building an SME Collaboration Hub in Microsoft Teams

From Discovery to Adoption: How We Design, Build, and Scale

White Paper Handout for Lab Participants

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Executive Summary

For most tax teams, the challenge isn't understanding what information they need from subject-matter experts. It's reliably getting it. When coordination depends on email threads and scattered file shares, tax professionals can end up spending significant time managing logistics rather than doing tax work. This white paper walks through a practical, repeatable approach for building an SME Collaboration Hub inside Microsoft Teams, with SharePoint, Planner, Power Automate, Bookings, and Power BI supporting the experience. The model is designed to reduce friction for SMEs, ease administrative burden for tax teams, and produce documentation that holds up over time.

Learning Objectives

- Understand a repeatable project lifecycle: Discovery → Co-Design → Build → Test → Train → Improve.
- See how Teams, SharePoint, Planner, Bookings, Power Automate, and Power BI work together as one hub.
- Apply adoption and governance practices that increase SME participation and reduce administrative burden.

- Identify practical metrics that help tax teams monitor progress and improve collaboration over time.

Audience

- Tax leaders and managers running cross-functional initiatives (e.g., credits/incentives, compliance support, documentation collection).
- Tax technology, process improvement, and transformation teams.
- Professionals looking for an educational, non-sales framework they can reuse in their organization.

1. The SME Collaboration Problem

Tax work often requires learning about innovation and operational activities from engineers, developers, scientists, and business leaders. The traditional approach of interviews, email, and attachments tends to create friction for SMEs and administrative burden for tax teams, while making it difficult to track what has been completed and what is still outstanding. [A Collaboration Hub](#) addresses the coordination problem directly. By consolidating requests, guidance, tasks, scheduling, and documentation into one familiar workspace, it reduces effort on both sides and makes follow-through more consistent.

A Practical Shift in Expectations: “Documentation First”

A useful way to frame this is: “Pave the road with documentation and fill the potholes with interviews.” The idea is to collect and organize supporting materials first, in a structured and accessible way, with clear instructions for SMEs. Interviews then become focused conversations to clarify what the documentation cannot fully capture on its own. This approach tends to respect SME time, keep the process moving, and produce stronger records at the end of the cycle.

2. What Success Looks Like

- One trusted collaboration space for tax and SMEs
- Clear ownership, due dates, and visibility into deliverables
- Self-service knowledge for SMEs (short videos, FAQs, examples)
- Built-in tracking and reporting to support compliance and readiness
- A scalable, reusable model that improves each year

3. Why Microsoft Teams Works as the Hub

One of the most consistent observations in working with tax teams is that adoption is largely a function of familiarity. When SMEs are asked to log into a separate platform with new credentials, participation tends to decline before the process really begins. Teams addresses this by working within an environment most organizations already use every day. SMEs can respond to requests, upload files, and check task status without a learning curve or the sense that they are stepping into an unfamiliar workflow. That kind of low-friction design tends to make a meaningful difference in completion rates. The most effective approach is often simply [meeting SMEs where they already are](#). Teams makes that possible within the organization's existing security boundary, without requiring new credentials or additional IT overhead.

4. A Repeatable Project Lifecycle

Teams that move directly to building often find themselves revisiting decisions later in the cycle. The lifecycle below is designed to help with that. It reflects what tends to work across a range of organizations: a consistent sequence that reduces rework, supports SME adoption, and leads to a stronger result in the first pass.

Discovery (Architecture Phase)

- Interview tax and SME stakeholders to map pain points and priorities.
- Define what worked in prior cycles and what must improve.
- Clarify required information, SME responsibilities, and deadlines.
- Document expectations in a short charter; revisit at the end of the cycle.

Co-Design & Feedback

- Prototype channel structure and navigation.
- Co-write questions in plain language; validate sample answers.
- Design page flow and choose response formats (multiple choice, drop-downs, free text).
- Engage a small set of “MVP SMEs” to provide early feedback.

Build

- Create the landing page (welcome, quick links, short video).
- Set up FAQs and guide materials.
- Create surveys and document intake folders.
- Configure Planner tasks, reminders, and reporting (start simple and iterate).

Test

- Have 2–3 MVP SMEs walk through the hub end-to-end.
- Confirm that navigation and instructions are clear.
- Refine based on real user behavior before broad rollout.

Train

- Host short sessions segmented by SME group (product, location, subject matter).
- Explain “what’s in it for me” and how the hub reduces effort.
- Record a standard walkthrough video and post it to the hub.
- Offer office hours and a clear support path.

Improve

- Revisit the discovery charter and confirm success criteria were met.
- Measure compliance and engagement; capture user feedback.
- Debrief and prioritize improvements for the next cycle.
- Perform year-end cleanup so the hub starts clean next year.

5. Lab Walkthrough: What Participants Will Experience

The lab is structured to be practical and applicable. Rather than covering concepts in the abstract, we will walk through real examples, demonstrate the hub in a live environment, and give participants enough context to take concrete next steps. Here is what to expect:

- A guided walkthrough of the hub concept (why, how, and what).
- Real-world examples of hub usage with taxpayers (pain points, outcomes, lessons learned).
- A live demo of Teams and integrated tools: SharePoint, Planner, Bookings, Power Automate, and Power BI.
- A practical checklist and reference materials to take back to your organization.

Facilitation Roles

- Peter Green, Moderator: agenda, framing, timekeeping, and transitions.
- Jason Massie, Practice Examples: real-life scenarios, SME engagement strategy, and lessons learned.
- John Hong, Live Demo: Teams hub navigation and end-to-end tool walkthroughs.

Level of Interaction

- Guided walkthroughs and live demonstrations (hands-on learning through observation).
- Questions encouraged throughout; discussion prompts to map ideas to your environment.
- Focus on educational use cases and repeatable steps (not sales content).

6. Suggested Hub Framework (Before You Build)

Before building, it is worth mapping the experience from the SME's perspective. What pages will they encounter? What will each one ask of them? How do they move through the process from beginning to end? This planning step is often underestimated. Getting the structure right and writing clear, plain-language instructions tends to matter more than adding features early. A straightforward hub that SMEs consistently engage with will outperform a more capable one that sees low participation.

- Landing page (welcome text, short video, clear buttons)
- Contacts page (support channels + scheduling)
- FAQ / guidance page (law, examples, guidebook, short videos)
- Questionnaires and surveys (structured inputs + upload prompts)
- Document library (organized storage and versioning)
- Tasks (what is due, by whom, and when)
- Automation (reminders and nudges)
- Reporting (visibility into progress and compliance)

7. Microsoft Tool Reference (How the Pieces Fit Together)

The tools described below are part of the Microsoft 365 environment that most organizations already have. What is often missing is not the technology itself,

but a clear understanding of how the components connect and how to configure them for a tax use case. This section offers a plain-language overview of each tool and how it contributes to the hub.

Microsoft Teams

Overview

Microsoft Teams is the central collaboration platform that brings together people, conversations, files, meetings, and apps into one secure workspace.

Key Features

- Channels for topic-based collaboration
- Integrated apps (Planner, SharePoint, Power BI, Bookings)
- Secure access and permissions
- Chat, meetings, and file collaboration

Tax Use Examples

- SME collaboration hubs
- Central location for tax initiatives
- Audit-ready communication history

Helpful Tips

- Keep channel structure simple
- Pin key tabs for SMEs
- Use Teams as the front door, not the filing cabinet

How It Fits in the Hub

- Acts as the “front door” where SMEs start.
- Surfaces other tools as tabs (pages, tasks, dashboards, scheduling).
- Houses durable collaboration history in channels and meetings.

SharePoint Surveys and Folders

Overview

SharePoint provides structured data collection and secure document storage that integrates seamlessly with Teams.

Key Features

- Custom surveys and forms
- Document upload capability
- Automatic file storage and version control
- Permissions and audit trail

Tax Use Examples

- Standardized SME data collection
- Secure document intake
- Centralized audit documentation

Helpful Tips

- Standardize survey questions
- Require document uploads where possible
- Avoid emailing sensitive files

How It Fits in the Hub

- Captures standardized responses in a consistent format.
- Enables secure document intake with automatic storage.
- Supports versioning and permissions for audit readiness.

Planner Tasks in Teams

Overview

Planner enables teams to assign, manage, and track tasks directly within Microsoft Teams.

Key Features

- Task assignment and due dates
- Progress tracking
- Visual boards and charts
- Integration with Teams channels

Tax Use Examples

- Tracking SME deliverables
- Managing compliance deadlines
- Reducing email follow-ups

Helpful Tips

- Always assign an owner
- Use due dates consistently
- Group tasks by compliance area

How It Fits in the Hub

- Turns SME deliverables into owned tasks with due dates.
- Makes progress visible without chasing email threads.
- Provides status signals for reminders and reporting.

Microsoft Bookings

Overview

Microsoft Bookings allows teams to create shared scheduling pages so others can easily book time with them.

Key Features

- Self-service scheduling
- Automated confirmations and reminders
- Integration with Outlook and Teams meetings

Tax Use Examples

- Scheduling SME office hours
- Joint SME working sessions
- Reducing back-and-forth emails

Helpful Tips

- Define clear meeting purposes
- Limit available time blocks
- Use for repeatable meeting types

How It Fits in the Hub

- Allows self-service scheduling for interviews, working sessions, and office hours.
- Reduces back-and-forth scheduling emails.
- Standardizes meeting purposes and expectations.

Power Automate

Overview

Power Automate enables the automation of routine tasks and notifications across Microsoft applications.

Key Features

- Automated reminders and alerts
- Workflow triggers based on actions
- Integration with Teams, Planner, and SharePoint

Tax Use Examples

- Automated task reminders
- Survey completion notifications
- Escalations for overdue items

Helpful Tips

- Start simple
- Automate repetitive follow-ups
- Document your automations

How It Fits in the Hub

- Automates routine follow-ups and reminders.
- Triggers workflows based on submissions, due dates, or file uploads.
- Creates consistency and reduces manual administration.

Power BI

Overview

Power BI provides interactive dashboards and reports that turn data into actionable insights.

Key Features

- Real-time dashboards
- Data visualization
- Integration with Microsoft 365 data sources
- Secure sharing and access

Tax Use Examples

- Tracking SME compliance
- Monitoring task completion
- Leadership reporting

Helpful Tips

- Focus on key metrics
- Keep visuals simple
- Use data to drive accountability

How It Fits in the Hub

- Provides dashboards for completion, response rates, and aging.
- Gives leadership visibility without manual status reporting.
- Helps identify bottlenecks and target improvements.

8. Adoption Practices and Lessons Learned

In our experience, the technical setup is rarely the most challenging part of building a Collaboration Hub. Adoption tends to be. The teams that see the strongest results tend to share a common approach, and the friction points that arise are often predictable. The principles below reflect what we have observed across real engagements, including insights from [tax teams using AI to support R&D documentation workflows](#) and how the same design principles apply in a hub context.

- Start with SMEs, not tools.
- Less is more. Keep the structure simple.
- SMEs don't want to "learn Teams"; design so they can succeed with minimal training.
- Automate where possible but avoid notification fatigue. A few well-timed reminders work better than a steady stream of alerts.
- Measure compliance, log pain points, and improve rapidly.
- Build once, reuse often, refine cautiously.

9. Quick Start Checklist

This checklist is intended as a practical reference when returning to your organization. It follows the sequence described throughout this paper and reflects what we have found to be effective across real R&D credit engagements. For more on how we apply these principles, see [the MASSIE Method](#).

- Define initiative, SME groups, deadlines, and deliverables.
- Run discovery interviews and document success criteria in a charter.
- Design a simple Teams structure and landing page.
- Build FAQs and training materials (keep them short).
- Create surveys and document intake folders with clear instructions.
- Create Planner tasks with owners and due dates.
- Add lightweight reminders with Power Automate.
- Publish basic Power BI visibility dashboards.
- Test with 2–3 SMEs and refine the experience.
- Train by SME group; record a walkthrough; offer office hours.
- Debrief, improve, and clean up annually for next cycle.

We're looking forward to seeing you at the TEI Midyear Conference. If you have any questions before, during, or after the lab- please reach out!