

Microsoft Planner: Organize Work, Projects and Teams



Course outline

Provided by: Performance Management Consultants – PMC Training

Reference no. 294-27

Duration 1.00 day(s) | 6:00 hours ¹

Website link <https://pmctraining.com/training/microsoft-planner-organize-work-projects-and-teams/>

Streamlined Task Management for Teams and Individuals

In today's fast-paced work environment, effective task management and collaboration tools are essential for team success.

Microsoft Planner offers a simple, highly visual way to organize teamwork.

In this hands-on, instructor-led workshop, participants will learn how to harness the full capabilities of Microsoft Planner, including seamless integration with Microsoft To Do, Lists, and Loop.

Through practical exercises and demonstrations, attendees will leave with the skills and confidence to implement Planner for personal productivity and team project management.

Learning outcomes

By the end of the workshop, you will be able to:

- Understand the core features and functions of Microsoft Planner.
- Create, organize, and manage plans, tasks, and assignments efficiently.
- Integrate Microsoft Planner tasks with Microsoft To Do for personal task tracking.
- Understand when to use Planner vs. Lists for different project types.
- Collaborate and co-author using Microsoft Loop components tied to Planner tasks.
- Apply best practices for managing individual and team workloads in Microsoft 365.
- Navigate and troubleshoot common issues across Planner, To Do, Lists, and Loop.

Workshop topics

Introduction to Microsoft Planner

- Overview of the Microsoft 365 task ecosystem
- Accessing Planner: web, mobile, Teams integration

¹ The course hours reflect teaching time that often correlate with continuing education credits (CEC) or professional development units (PDU). Please check with your profession's governing body, as there is no universal approach.

- Key concepts: Plans, Buckets, Tasks, Labels

Building and Managing a Plan

- Creating a new plan
- Assigning tasks and setting due dates
- Using Buckets, Priorities, and Progress tracking
- Best practices for organizing plans for individuals and teams

Microsoft Planner and Microsoft To Do: Personal Productivity

- Syncing assigned Planner tasks into To Do
- Managing "My Tasks" across Planner and To Do
- Using Lists and Steps inside To Do to break down tasks

Microsoft Planner and Microsoft Lists: Project Data Management

- When to use Planner vs. Lists
- Creating and customizing a Microsoft List for task tracking
- Linking Lists with Planner plans

Microsoft Loop: Real-Time Collaboration

- Introduction to Microsoft Loop components
- Embedding Planner tasks in Loop pages
- Co-authoring and updating tasks dynamically with your team

Advanced Features and Best Practices

- Automating notifications and reminders
- Using Filters and Group By options effectively
- Setting up dashboards and reports with Planner data
- Common pitfalls and how to avoid them

Hands-On Practice and Scenarios

- Building a sample project plan
- Personalizing To Do and Planner for daily work
- Collaborative exercise using Loop and Planner

Prerequisites

Participants should have basic familiarity with Microsoft 365 applications (Outlook, Teams) and feel comfortable navigating web-based tools.

Who should attend this course?

Anyone looking to improve collaboration and productivity within Microsoft 365.