MASTERING TASK & WORK MANAGMENT — USING PLANNER

COURSE OVERVIEW

Planner is a lightweight task management application that your team can use to quickly create a plan, build a team, assign tasks, and update status.

Microsoft's most used Team's tab and fastest growing work management tool is nimble, keeps your documentation in one place, allows you to progress work & collaborate as a team, and send & track emails with work assignments. Save time with an Agile task board. Easily drag, drop, and prioritize assignments in a visual manner—ideal for both mobile and workstation use.

This workshop can be delivered in-person or remotely and is two hours long. There are no prerequisites for this course.

Participants will learn:

- Overview of MS Planner
- Using Planner with MS Teams
- Working with task cards
- Accessing Plannner hub
- Organizing work in Planner
- Using the mobile app

WHO SHOULD ATTEND

This course is targeted to any project stakeholder interested in learning about how to better leverage Planner to manage project tasks.

COURSE MATERIALS

Course materials are comprised of presentation and exercises. Attendees may also earn Professional Development Credits from the Project Management Institute (PMI®).

MS CLIENT RECOMMENDATIONS

The quality and consistency of our data were paramount. We needed a shared space where everyone could evaluate the information at the same time, in the same way.

Douglas
MD,
St. Luke's University Health Network

The consultative training approach was so effective! When can you come back?!?

Paul
Senior Project Manager, Archer Daniels Midland

COURSE OBJECTIVES

Getting started

- Access planner
- Build a new plan
- Create new tasks

Categorizing Work

- Filter tasks
- Group/sort tasks
- Color code cards

Working with Task Cards

- Update tasks
- Create checklists
- Add attachements

Integrate with other apps

- Embed in MS Teams
- Export to Excel
- Sync to Outlook

COURSE INSTRUCTORS & ACCREDITATION

This course will be taught by an experienced instructor, knowledgeable in the field of project management, MS Project/Project Server, and Planner. Your attendees will obtain key knowledge on how to leverage Planner and the Microsoft 365 suite to optimize collaboration, reporting, and process automation.

Advisicon's goal is to improve your processes and technologies, thus creating measurable results. For over 25 years, we have successfully helped customers learn, scale, and grow.

PAIN POINTS
THIS COURSE ADDRESSES!

I NEED AN "AGILE" TOOL!

Planner is ideal for Scrum or Kanban. Optimize it to suit your desired method.

I ONLY USE PROJECT ONLINE

Planner used in conjunction with Project Online offers you unique advantages! Furthermore, Planner can be integrated with Project Online for a seamless workflow.

VISUAL TOOLS WORK BETTER FOR ME

Organize and track work using task cards in a Board view. At a glance, you can easily & quickly find any task on the board.

MY PROJECTS AND TEAMS ARE SMALL

Planner was designed just for this purpose! It makes sense to use a less elaborate tool when you don't have the complex tracking needs associated with a large team and big projects.