

Our mission is to deliver technology, tools and training to maximize impact, productivity and purpose



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# MASTERING TASK & USING WORK MANAGMENT

# **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
- Accessing Plannner hub
- Organizing work in Planner
- Using the mobile app
- Working with task cards

# 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<sup>®</sup>).

# 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?!?

## **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



# **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.

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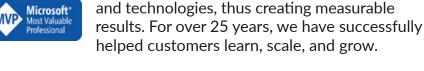
Advisicon's goal is to improve your processes

5411 NE 107<sup>th</sup> Avenue Vancouver, WA 98662



# **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.



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