Microsoft Planner

Stay on top of tasks and projects

May Spotlight Session



AGENDA

Microsoft Solutions Partner
Modern Work

1. Why use Microsoft Planner
2. Creating plans and setting up boards
3. Assigning tasks and tracking progress
4. Tips for effective task management
5. Q&A

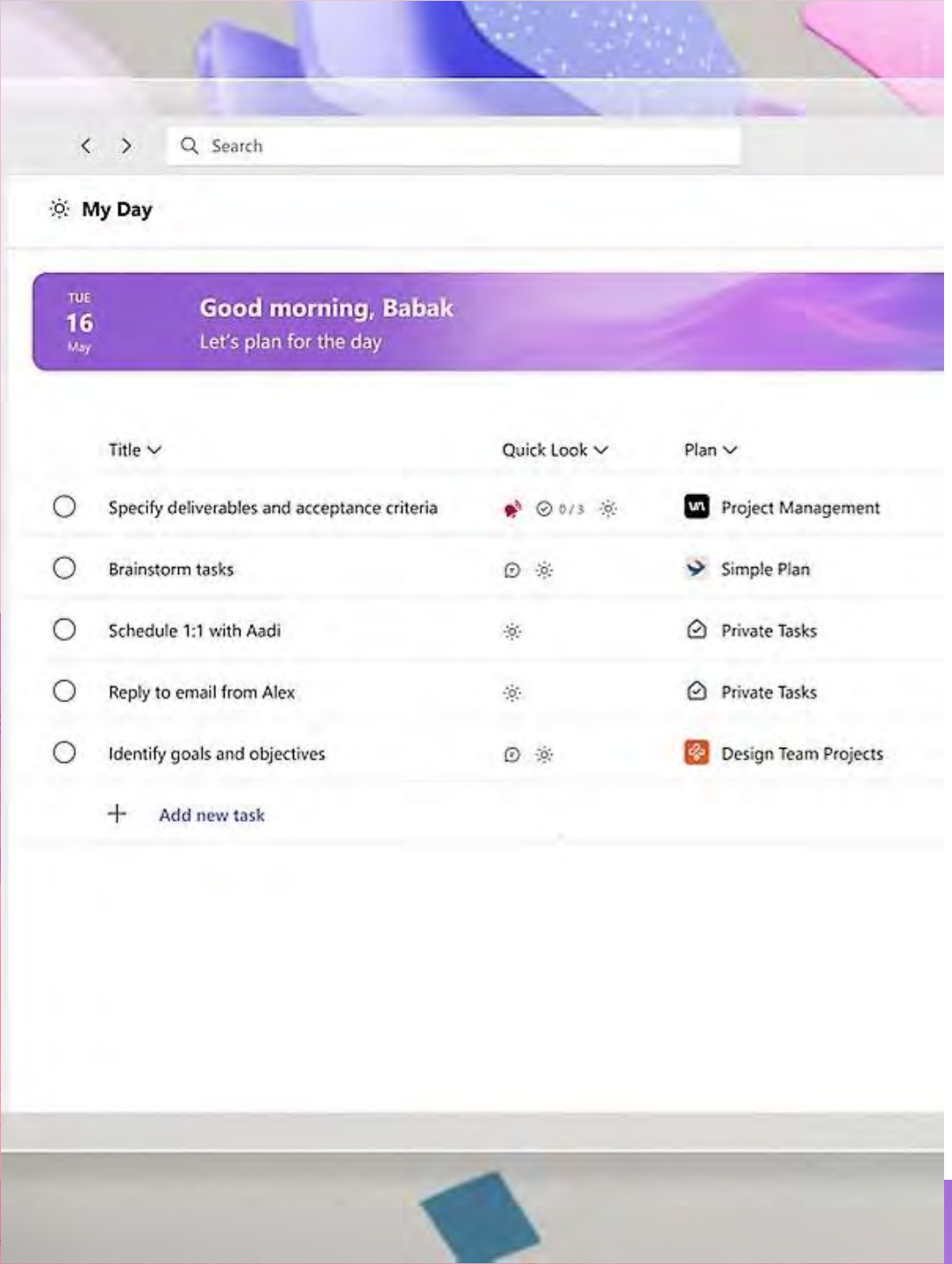
A simple, visual way to manage tasks, deadlines and workloads, especially for Modern Workplace teams.



Why Use Microsoft Planner

Visual and collaborative task and project management

- ✅ **Enhanced clarity and organisation**
- ✅ **Improved accountability and visibility**
- ✅ **Streamlined project and task collaboration**
- ✅ **Efficient resource management**
- ✅ **Adaptable and flexible**
- ✅ **Enhanced productivity and reduced overwhelm**
- ✅ **Data-driven improvements**
- ✅ **Consistency across the organisation**



Where Planner Fits

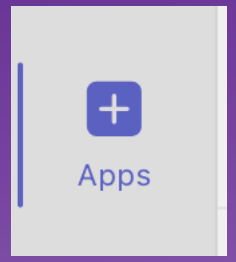
Planner is perfect for teams already using Microsoft 365

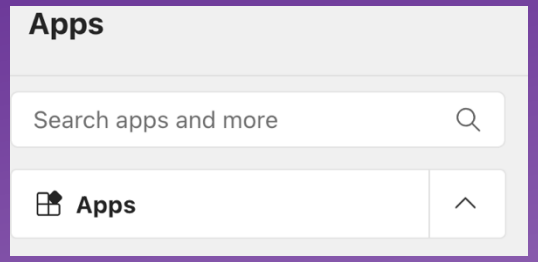
Simpler and more accessible than tools like Asana or Monday.com

Ideal for non-technical users, not just for development teams

Built-in integration with Teams, Outlook, SharePoint, and To Do gives everyday users an advantage

If Microsoft Planner were a pinboard in your office, then a Plan would be the full board dedicated to a single project. Buckets would be the columns where you group your sticky notes, and each sticky note is a task you're working on.







TIME FOR A DEMO

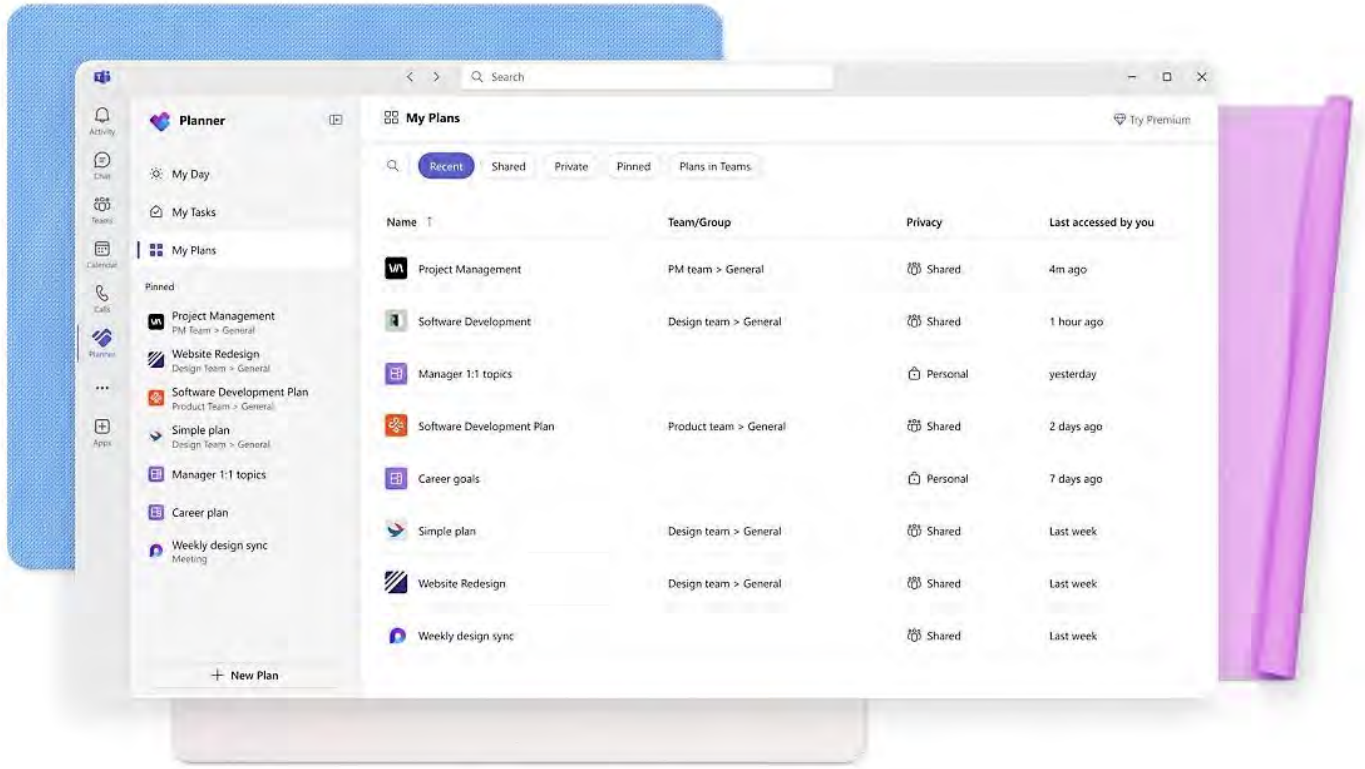
TASKS.OFFICE.COM

PLANNER.MICROSOFT.COM

VISUALLY TRACK WHAT NEEDS TO BE DONE, WHO'S DOING IT, AND WHERE EVERYTHING STANDS

CREATING PLANS AND SETTING UP BOARDS

Key concepts



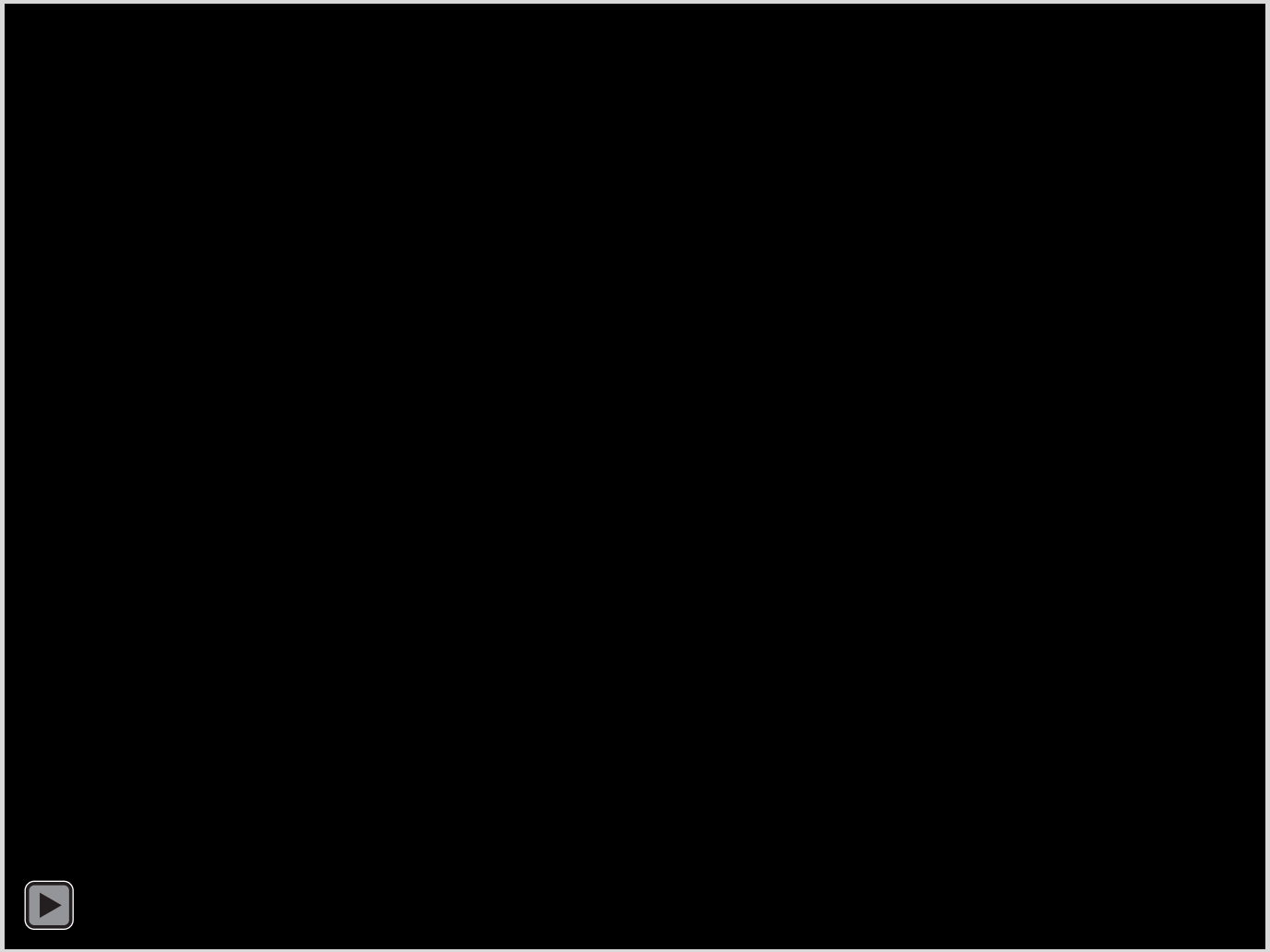
For a distinct project or purpose.

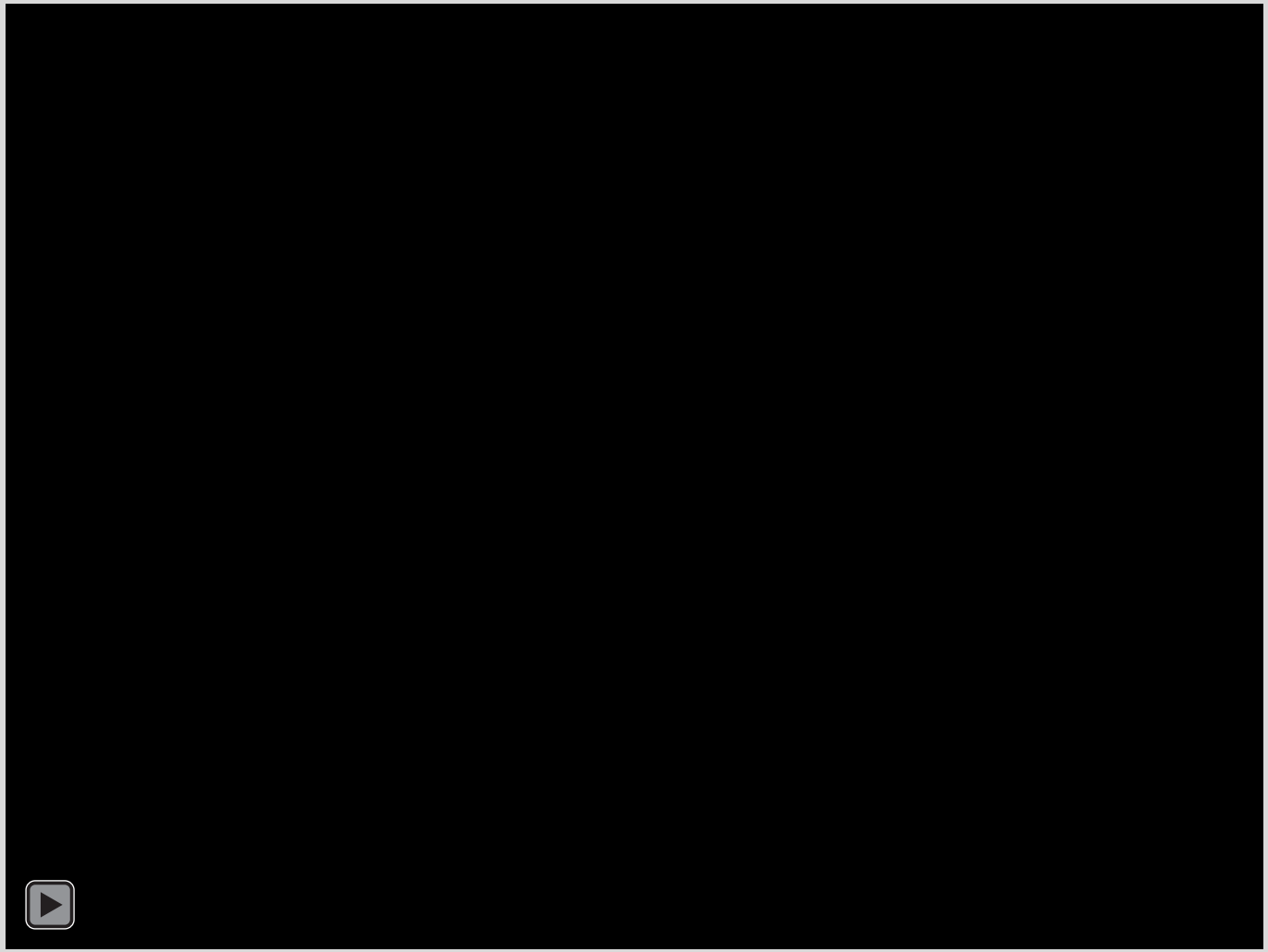
Plans live inside Microsoft 365 Groups

Plans are made up of buckets and tasks

Plans are collaborative by default



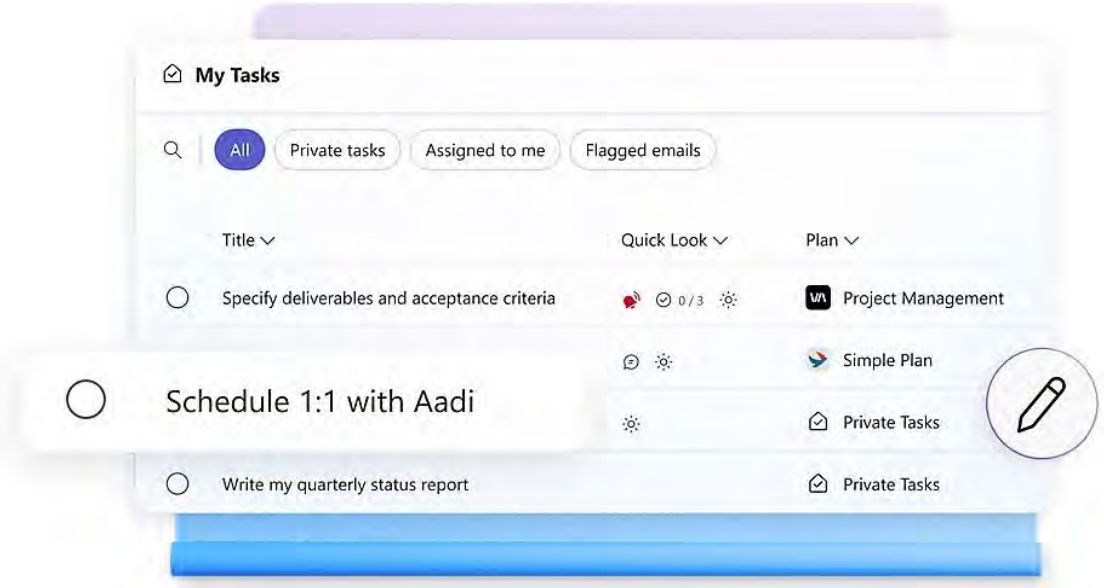




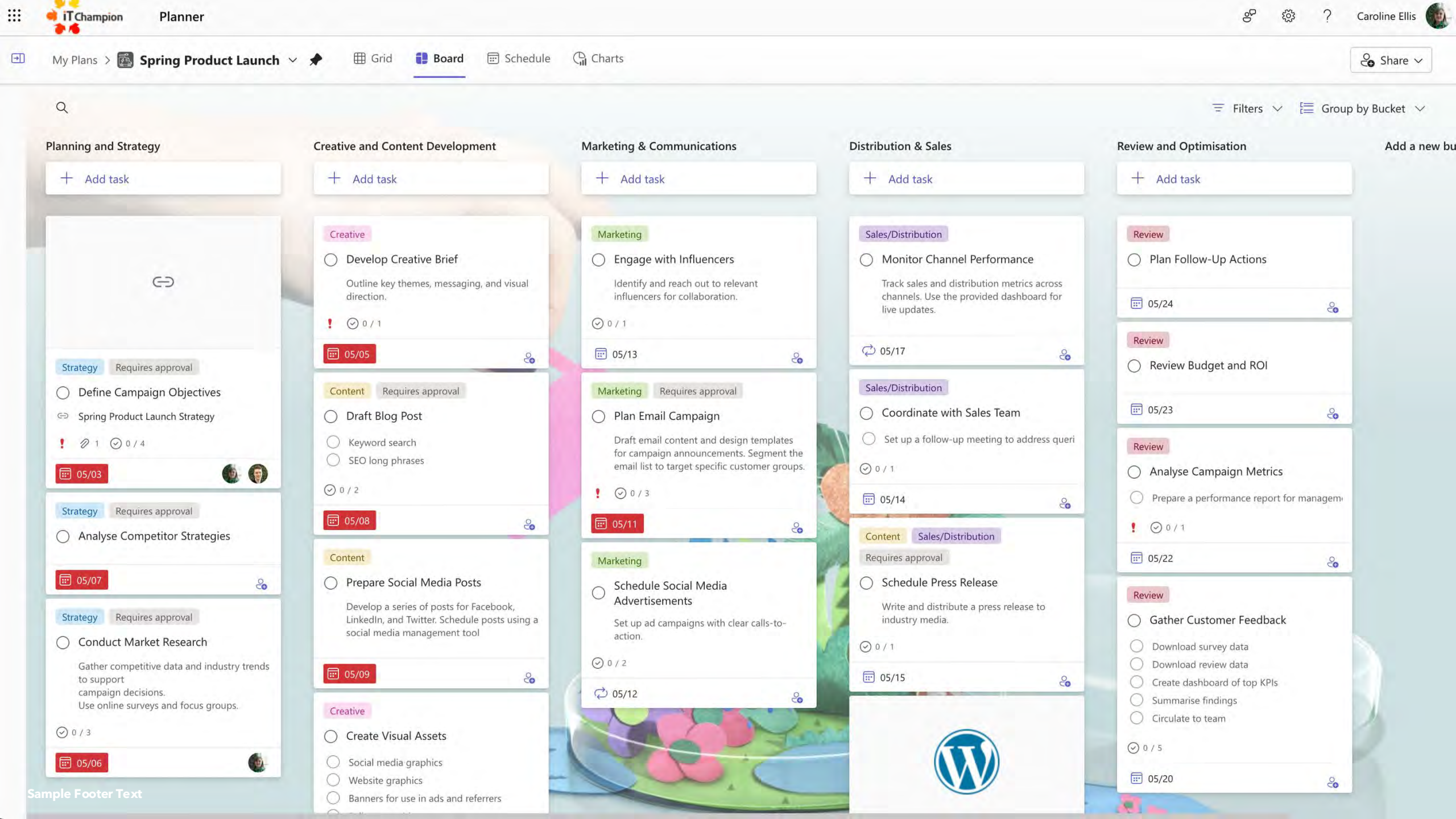
FOCUS ON THE MOST MEANINGFUL TASKS

ASSIGNING TASKS AND TRACKING PROGRESS

Tasks are like sorting cards



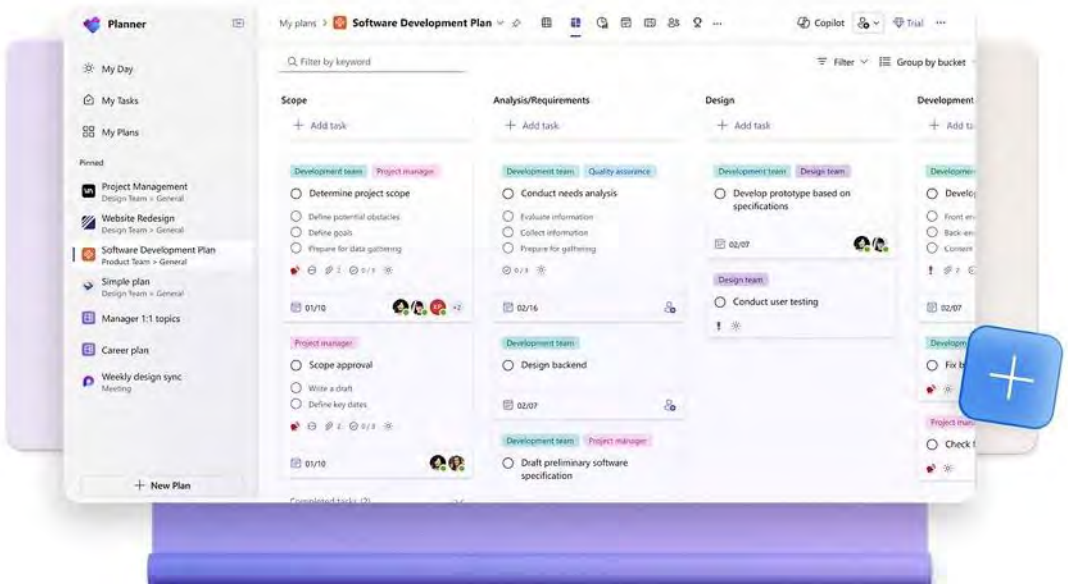
- You create a task under the relevant bucket.
- They can highlight key details such as: title, due date, description, checklist and attachments.
- Assign tasks to people within your organisation, these will appear in their Planner view
- Track and amend the status using the simple: Not Started, In Progress, Completed
- Use the chart view to gain insights into task distribution and completion.
- Schedule view can help identify bottlenecks and upcoming deadlines


iT Champion
Planner
Caroline Ellis
My Plans
Spring Product Launch
Grid
Board
Schedule
Charts
Share
Filters
Group by Bucket
Planning and Strategy
Add task
Strategy
Requires approval
Define Campaign Objectives
Spring Product Launch Strategy
1
0 / 4
05/03
Strategy
Requires approval
Analyse Competitor Strategies
05/07
Strategy
Requires approval
Conduct Market Research
Gather competitive data and industry trends to support campaign decisions.
Use online surveys and focus groups.
0 / 3
05/06
Creative and Content Development
Add task
Creative
Develop Creative Brief
Outline key themes, messaging, and visual direction.
0 / 1
05/05
Content
Requires approval
Draft Blog Post
Keyword search
SEO long phrases
0 / 2
05/08
Content
Prepare Social Media Posts
Develop a series of posts for Facebook, LinkedIn, and Twitter. Schedule posts using a social media management tool
05/09
Creative
Create Visual Assets
Social media graphics
Website graphics
Banners for use in ads and referrers
Marketing & Communications
Add task
Marketing
Engage with Influencers
Identify and reach out to relevant influencers for collaboration.
0 / 1
05/13
Marketing
Requires approval
Plan Email Campaign
Draft email content and design templates for campaign announcements. Segment the email list to target specific customer groups.
0 / 3
05/11
Marketing
Schedule Social Media Advertisements
Set up ad campaigns with clear calls-to-action.
0 / 2
05/12
Distribution & Sales
Add task
Sales/Distribution
Monitor Channel Performance
Track sales and distribution metrics across channels. Use the provided dashboard for live updates.
05/17
Sales/Distribution
Coordinate with Sales Team
Set up a follow-up meeting to address queri
0 / 1
05/14
Content
Sales/Distribution
Requires approval
Schedule Press Release
Write and distribute a press release to industry media.
0 / 1
05/15
Review and Optimisation
Add task
Review
Plan Follow-Up Actions
05/24
Review
Review Budget and ROI
05/23
Review
Analyse Campaign Metrics
Prepare a performance report for managem
0 / 1
05/22
Review
Gather Customer Feedback
Download survey data
Download review data
Create dashboard of top KPIs
Summarise findings
Circulate to team
0 / 5
05/20
Add a new bu
Sample Footer Text

MAKE YOUR TASKS WORK FOR YOU –
ORGANISED, PRIORITISED, AND ON TRACK

TIPS FOR EFFECTIVE TASK MANAGEMENT

Five things to maximise Planners effectiveness



Naming conventions and standard practices

Setting deadline and reminders

Collaboration best practices

Use labels

Mobile access

Recap

The Kanban “task board” is a tried and tested approach that many recognise

Support for buckets, progress, labels, assignees, dates, priority, sub-tasks, attachments, comments

Multiple ways to view information

Tasks can be assigned to multiple people

Great for non-technical users

Brings project plans to life and enables real-time updates and status tracking

Helps teams and individuals break down large projects into manageable categories and tasks

MICROSOFT PLANNER

QUESTIONS TO ANSWERS

WHEN USING PLANNER ACROSS AN ORGANISATION, IS THERE A WAY TO KEEP SOME DETAILS PRIVATE THAT THE WHOLE TEAM MAY NOT NEED TO SEE?

When using **Microsoft planner** across an organization, there are a few ways to manage **privacy and visibility** of task details, though planner is primarily designed for **team collaboration**, not granular privacy. Here's how you can approach it:

🔐 Privacy options in Microsoft planner

1. Separate plans for sensitive work

Best practice: create a **separate plan** for tasks that should only be visible to a subset of users.

Each plan is tied to a **Microsoft 365 group**, so only members of that group can see the plan and its tasks.

This is the most effective way to keep certain details private.

2. Use buckets and labels strategically

While **buckets** and **labels** help organize tasks, they **don't restrict visibility**.

You can use them to **visually separate** sensitive tasks, but all plan members will still see them.

3. Task comments and attachments

All members of a plan can see **all tasks**, including **comments and attachments**.

If you need to share sensitive files or notes, consider linking to a **SharePoint document with restricted access** instead of uploading directly to the task.

4. Microsoft to do for personal tasks

For private task tracking, users can use **Microsoft to do**, which integrates with planner but keeps personal tasks separate and private.

5. Use Microsoft Teams channels wisely

If your planner plan is linked to a **Teams channel**, consider using **private channels** with their own planner tabs for restricted collaboration.

FOR MICRO TASKS THAT COME UP DURING A DAY, WOULD YOU ADD THEM TO PLANNER, OR CONTINUE USING MS TO DO?

Planner tasks assigned to you **automatically show up in Microsoft To Do** under the **"Assigned to Me"** list. This means you can manage your day in To Do while still contributing to team plans in Planner.

Use Microsoft To Do for Micro Tasks

For quick, personal, or ad-hoc tasks that pop up during the day (e.g., "Email Sarah," "Book meeting room," "Review slide deck"), Microsoft To Do is the better fit:

- Fast capture: Add tasks quickly without needing to assign, categorize, or collaborate.
- My Day view: Helps you focus on just today's priorities.
- Personal and private: Keeps your workspace uncluttered for others.
- Cross-device sync: Works seamlessly across desktop, mobile, and web.

Use Planner for Team-Visible or Project-Related Tasks

If the micro task:

- Impacts others
- Needs tracking or accountability
- Relates to a shared project or deliverable

…then it's worth adding to Planner, even if it's small. You can always:

- Assign it to yourself
- Use labels or buckets to group it
- Set a due date and mark it off quickly

YOU CAN MANAGE WHAT APPEARS IN **"MY DAY"** IN **MICROSOFT TO DO**, BUT WITH SOME IMPORTANT NUANCES—ESPECIALLY WHEN IT COMES TO TASKS PULLED FROM **OUTLOOK**, **PLANNER**, AND OTHER SOURCES.

"My Day" in Microsoft To Do is a **manually curated list**—nothing is added automatically unless you choose to add it. Here's how it works with different sources:

Outlook Tasks

Tasks flagged in Outlook do not automatically appear in "My Day".

They appear in the "Flagged Email" list in To Do.

You can manually add them to "My Day" by clicking the sun icon next to the task.

Planner Tasks

Tasks assigned to you in Planner appear in the "Assigned to Me" list in To Do.

Again, they don't go into "My Day" automatically–you choose what to focus on.

To Do Tasks

Any task you create in To Do can be added to "My Day" manually.

You can also use smart suggestions: click the lightbulb icon in "My Day" to see recommended tasks from other lists.

IF YOU MARK FLAGGED EMAILS AS COMPLETED IN PLANNER DO THEY GET MARKED AS COMPLETE IN YOUR EMAIL?

Microsoft 365 apps are connected, but not always in the way you'd expect.

Flagged Emails and Task Completion: What Happens?

When you flag an email in Outlook, it appears in the "Flagged Email" list in Microsoft To Do (not Planner directly). Here's how the sync works:

Marking Complete in To Do

If you mark a flagged email as complete in Microsoft To Do, it does get marked as complete in Outlook. The flag is cleared, and the email is no longer flagged in your inbox.

Microsoft says Planner Does Not Sync with Flagged Emails BUT

When you are in My Day on a web browser and go to 'My Tasks', click 'Flagged Emails' and tick the Complete button it DOES update the Flagged email in your inbox.

CAN EXTERNAL USERS BE ADDED THE GROUP/TEAM ? EG COLLABORATE WITH OTHER ORGANISATIONS USERS WITHIN TEAMS?

You can collaborate with external users in Microsoft Teams and Planner—but there are some important details and limitations to be aware of.

Microsoft Teams (Guest Access)

You can invite **external users** (e.g., partners, vendors, clients) as **guests** to a **Microsoft 365 Group or Team**. Once added:

- They can access **Teams channels**, **files**, and **Planner** (if enabled).
- They'll need a **Microsoft account** (personal or work/school).
- Their access is controlled by your **organization's guest access policies**.

Planner Access for Guests

Guests **can access Planner**, but with **limitations**:

- They can **view and update tasks** in the plan.
- They **cannot create new plans**.
- They **must be added to the Microsoft 365 Group** associated with the plan.

Important: Guest access to Planner must be **enabled in Microsoft 365 Admin Center** and **Azure AD settings**.

DO YOU NEED TO SET UP A TEAMS CHANNEL TO START IF YOU WANT TO USE THIS COLLABORATIVELY?

You don’t need to set up a Teams channel first to use Microsoft Planner collaboratively—but doing so can make collaboration much smoother and more integrated. Here's a breakdown:

Option 1: Use Planner Without Teams

- You can create a Planner plan directly from the Planner web app or Tasks app in Microsoft 365.
- It will still be tied to a Microsoft 365 Group, which handles permissions and membership.
- You can collaborate by adding members to the group—even if you’re not using Teams.

🔷 Use case: Good for lightweight collaboration or when Teams isn’t being used.

Option 2: Use Planner Within a Teams Channel

When you create a Team, it automatically creates a Microsoft 365 Group.

You can add a Planner tab to any channel in that Team.

This makes it easy to:

- Discuss tasks in context
- Share files
- Meet and chat in one place

🔷 Use case: Ideal for ongoing projects, cross-functional teams, or external collaboration.

Scenario	Teams Channel Needed?	Notes
Create a plan in Planner web app	❌ No	Still collaborative via M365 Group
Add Planner to a Teams channel	✅ Yes	Best for integrated teamwork
Collaborate with external users	❌ No (but easier with Teams)	Guests can be added to the Group

THANK YOU

JUNE SPOTLIGHT SESSION
IS ALL ABOUT MICROSOFT BOOKINGS