

MICROSOFT PLANNER PREMIUM



Corporate IT Course

LEARNING OUTCOMES

- Understand the Microsoft 365 environment and navigate key apps, including Teams and Planner.
- Explain the purpose and benefits of Microsoft Planner and Premium Plans.
- Create and manage plans, buckets, and tasks, including task details, dependencies, and assignments.
- Monitor task progress and visualise work using charts and dashboards.
- Set goals and link tasks to track achievement within Planner.
- Collaborate effectively by sharing plans, assigning tasks, and updating progress in real time.
- Integrate Planner with other Microsoft 365 tools, such as Outlook, Teams, and To-Do, to improve workflow.
- Use Microsoft 365 Copilot to generate tasks, analyse progress, and optimise task management.

COURSE OVERVIEW

Microsoft 365 provides powerful tools to manage tasks and projects efficiently, whether for personal goals, team initiatives, or organisational projects. In this full-day workshop, you will learn to use Microsoft Planner—including Premium Plans (formerly Project for the Web)—to plan, assign, track, and collaborate on tasks. You'll also explore integrating Planner with Outlook, Teams, and To-Do to streamline your workflow and boost productivity. This session includes practical hands-on activities.

TOPICS COVERED IN THIS COURSE

Introduction to Microsoft 365

Learn the basics of Microsoft 365, the concept of working in the cloud, and how to navigate around the suite, including Teams.

Overview of Planner for Teams

Discover the purpose of the new Planner for Teams, explore Premium licensing, and understand how to add personal or team plans.

Creating Premium Plans and Groups

Step through creating a Premium Plan and setting up Groups to manage tasks and collaboration effectively.

Using Buckets and Tasks

Learn to organise tasks into buckets, create and assign tasks, set dependencies, re-organise work, update progress, and switch views.

Managing Task Details

Explore how to create detailed tasks, track progress, and ensure all team members are aligned on priorities.

Charts and Progress Review

Visualise your work using charts, add tasks directly from chart view, reset plans, change groups, and re-assign tasks for efficient tracking.

Setting and Linking Goals

Define project goals, link tasks to specific objectives, and monitor progress against targets to ensure outcomes are achieved.

Optimising Planner for Team Productivity

Integrate Planner into your team workflow, streamline task management, and apply best practices to improve collaboration and project success.