

IN THIS CHAPTER

- » Understanding the role that Planner plays in managing plans
- » Seeing what Planner has to offer
- » Exploring common use cases for Planner for personal and business use
- » Sketching out your first plan

Chapter 1

Introducing Microsoft Planner

The beginning is always a great place to start, isn't it? But maybe you decided to jump ahead to one of the other chapters to dive right into Microsoft Planner and create some tasks. I like to poke around a bit myself before I read the instructions — sometimes until I hit a virtual wall and need help. But you're here now, probably because you want a deeper understanding of what Planner is and in what scenarios it could be useful to you. That's exactly what this chapter is about. I start with an overview of Planner.

Getting Acquainted with Planner

At its core, Planner is a tool that enables you to organize a sequence of tasks within a plan and track those tasks to completion. Planner is incredibly flexible because it provides a framework into which you can fit many different types of plans across a variety of scenarios (see “Investigating Planner Use Cases,” later in this chapter). Like many applications, you can use a few of Planner's features to create and manage simple plans, or use all its features — integrated with other applications like Microsoft Teams — to create and manage large or complex projects.



TECHNICAL
STUFF

In a nutshell, Teams lets you chat with other users, participate in online meetings, and store and collaboratively work on documents. That's the tip of the iceberg for Teams, because it works with all sorts of other apps, too. If you need more information on what Teams can do, check out Chapter 21 to find resources that explore Teams in detail. Or just search the web for “Microsoft Teams features” — or ask your favorite artificial intelligence (AI) about it.

If you've used the Tasks feature in Microsoft Outlook or the Microsoft To Do app in Microsoft 365, you have some sense of what Planner can do. However, Planner goes well beyond just giving you a means to create and manage a personal task list. With it, you can create plans that organize tasks for yourself and for others into a *project*.



REMEMBER

I use the term *project* to describe any sequence of actions or commitments that are arranged along a timeline and work toward achieving a defined result. This could include establishing a set of personal goals and achieving them, planning a wedding or trip, delivering an educational course, building and executing a business plan, building a house, or developing and delivering an application. All these projects have activities and requirements that span across a timeline and work together toward an end result.

To provide a visual example, Figure 1-1 shows a business plan in Planner, created using the Business Plan template that is included with Planner. The plan is organized into several buckets (more on that topic in the next section), each with some tasks that have checklist items associated with them. Not shown in the figure are additional tasks named Finalize Strategic Plan, Define the Market, and Five-Year Business Plan, each with its own checklists.

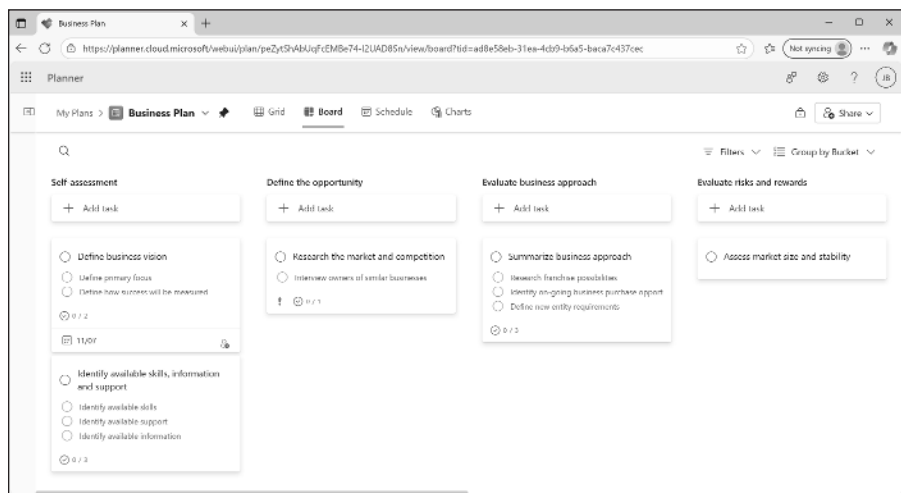


FIGURE 1-1:
Planner includes
several templates
to help you
quickly start
a new plan.

Planner certainly isn't the only project-planning tool available today. Several non-Microsoft project-planning tools are available, including Asana, Jira, Trello, and others. I explore some of these alternatives in Chapter 3. In addition, you can think of Planner as an entry point to Microsoft Project, Microsoft's flagship project-planning solution.



TECHNICAL
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Project currently claims about 14 percent of the project-management software market, second after first-place Jira, which holds about 24 percent of the market.

Here's the big picture: Planner offers an easy-to-use tool for planning and tracking tasks and commitments across a timeline as part of an overall plan. There are different versions of Planner — from a free version (Planner Basic Plan), through paid versions, all the way up to Project, each offering increasing levels of features and capabilities. Although other planning tools are available, Planner shines in its integration with Teams and other Microsoft tools. It's also an app published under the Microsoft 365 umbrella of applications, making it readily available to Microsoft 365 users. It's a perfect, inexpensive (or free) tool for project planning across a very broad range of use cases. It's particularly easy for novice planners to use, and it builds nicely toward more feature-rich versions like Project.

At this point, you should have a broad overview of what Planner can do. Other chapters explore these topics in more detail. For example, Chapter 2 digs deeper into the different versions of Planner, how to access those versions, and what points to consider when choosing one. Chapter 3 takes a brief look at some of the other planning tools available today and contrasts them with Planner.

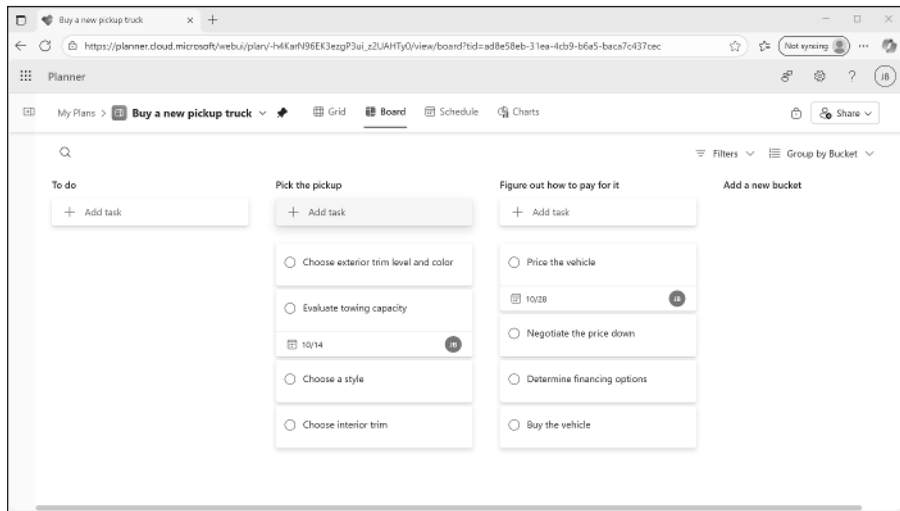
Exploring the Key Features and Benefits of Planner

Planner has a lot to offer, but in this section I focus on the core features for creating and working with tasks, along with the integration possibilities between Planner and other Microsoft tools, including Teams and Power BI.

Capturing and visualizing tasks

The best way to begin to understand what Planner can do is to see it in action. Figure 1-2 shows Planner with a simple plan that contains a handful of tasks for a project called Buy a New Pickup Truck. This is a very basic example because I've only created some tasks; I haven't assigned any start or end dates to sequence them across the project timeline.

FIGURE 1-2:
This is a
simple plan for
purchasing a new
pickup truck.



Organizing tasks

Just slapping sticky notes on a board without any organization may be a good way to get your ideas out, or in this case, start to define key tasks. But any good plan needs to be organized, particularly when a project has *precursors* (tasks that must be completed or requirements that must be met before certain other tasks can begin or be completed) and *dependent items* (tasks that rely on precursors to be done before they can be completed).

Figure 1-2 shows the tasks using the Board view, which works well for visualizing tasks grouped into buckets. I've created a couple of buckets and moved my original tasks from the To Do bucket into buckets that match each task's area, leaving the To Do bucket empty. A bucket doesn't necessarily indicate a sequence for completing tasks. Although I've grouped the tasks in Figure 1-2 into buckets based on two key areas, it doesn't mean that the tasks in the Pick the Pickup bucket need to be completed before the tasks in the Figure Out How to Pay for It bucket.

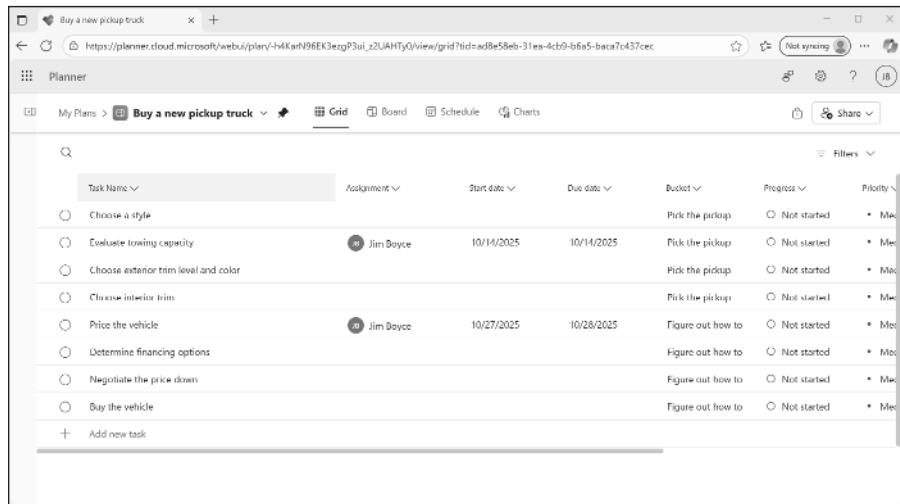


TIP

Think of buckets as a way to organize tasks into logical groups that generally have something in common but that don't necessarily fall into the same span of the project's timeline.

The Grid view, shown in Figure 1-3, helps you visualize the tasks as a table (referred to as a *grid*). You can edit tasks *inline* in the Grid view, meaning you can edit the tasks' properties right in the grid without opening them in a separate window. The Grid view also lets you filter and sort tasks, for example sorting all tasks by start or end date, showing only the tasks assigned to a specific person, or showing only tasks that have not started yet.

FIGURE 1-3:
Use the Grid
view to sort and
filter all tasks,
regardless of
what bucket
they're in.



Have a look at Chapter 5 for details on using Planner views effectively. See Chapter 7 for tips on buckets and other ways you can organize and structure tasks.

Scheduling tasks

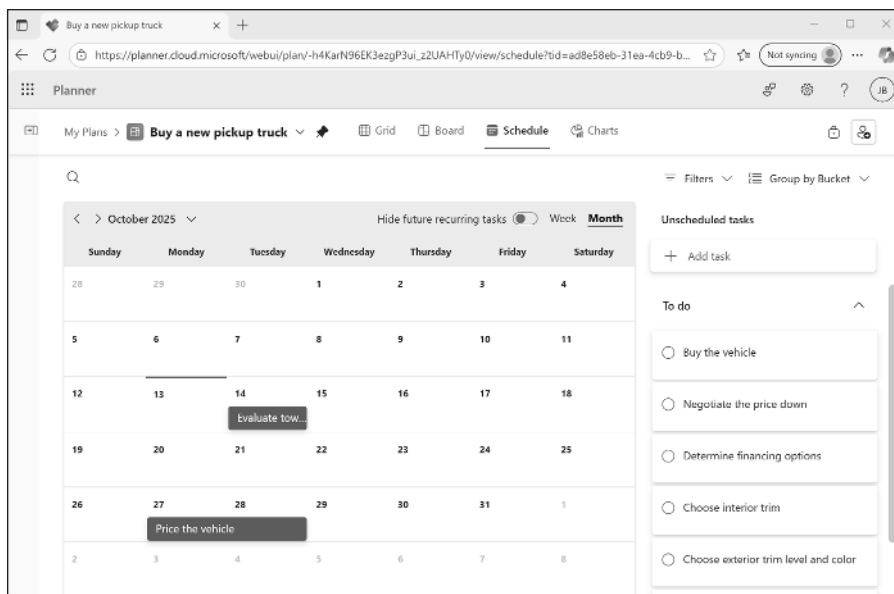
Every project has a timeline. In almost every case, a task will have a start date and a due date. You can add a start date and a due date to a task when you create it, but in most cases, you'll create tasks, organize them into buckets, and then begin scheduling them after the body of tasks in your plan begins to take shape.



Some things that you enter as tasks won't have start or end dates. For example, you may include things that you haven't decided are part of the project, or that happen so far in the future that you can't define their dates. Future tasks that do need dates may be dependent on other tasks that haven't been completed yet, so you may leave those dates blank until you get a better idea of when those precursors will be completed. Ongoing tasks like monitoring system performance or responding to customer complaints also won't have clear start or due dates. You could argue that these types of tasks don't belong in a project that has a finite timeline, but adding them helps you remember and plan for those activities. You could group them together into a bucket called Things That Never End!

This is a good place to introduce the Schedule view, shown in Figure 1-4. This view shows your tasks by due date on a calendar to help you visualize not only when the task is supposed to end, but also how it relates to other tasks on the timeline.

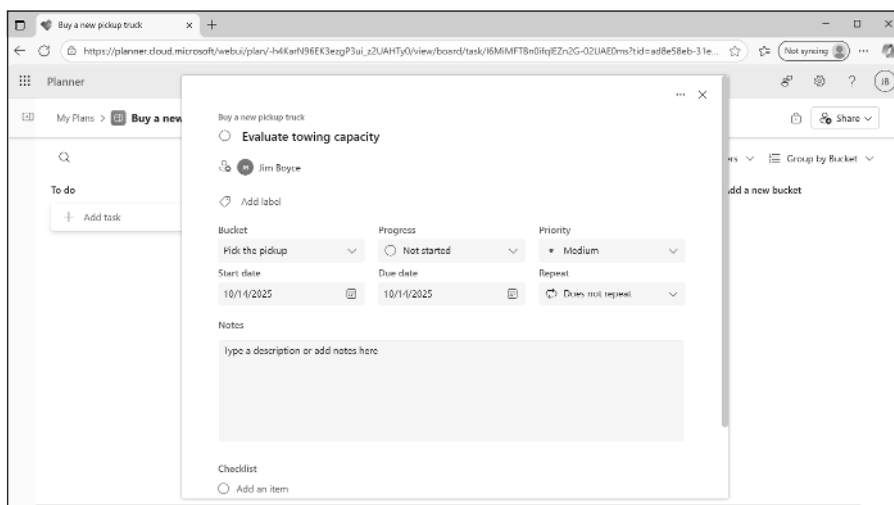
FIGURE 1-4:
Use the Schedule
view to visualize
tasks on a
calendar.



Assigning tasks

Planner is a great tool for creating, managing, and completing personal projects. But it's also a great tool for teams of people to manage and deliver projects. The key feature that supports teams in Planner is task assignment. Figure 1-5 shows a task that I've assigned to myself, indicated by my name near the upper left of the task form. I need to check the axle ratio and other specifications of the pickup I want to buy to determine how much weight I can haul with it.

FIGURE 1-5:
I've assigned a
task to myself.



Assigning a task is easy! For example, in the Grid view, just click the Assignment column and pick a person. You can also assign tasks in the Board view. The assignee receives a notification after you assign a task to them.



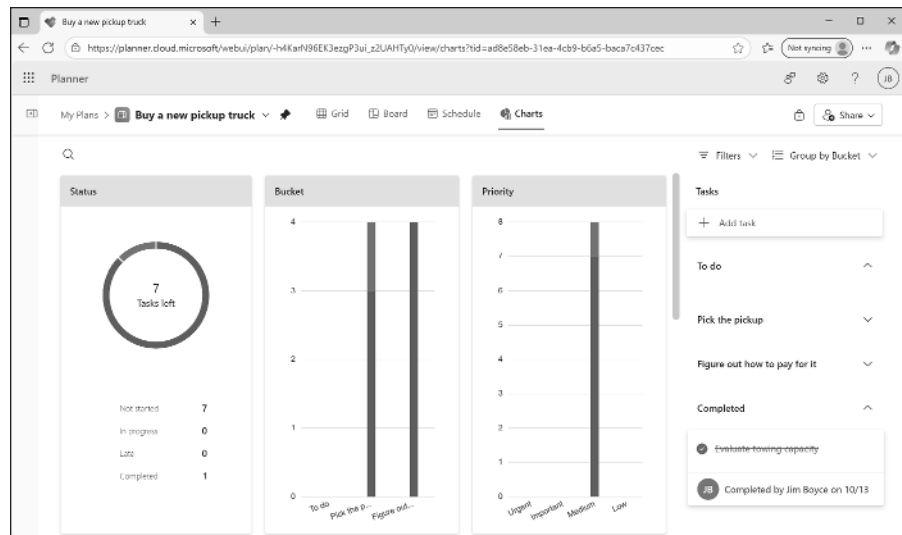
TIP

There are a few requirements for assigning tasks to someone, one of which is that they have to be a member of the plan. For example, people in your organization must have a valid Microsoft 365 account in your organization or tenant, and external users must be added as guests to the group. Check out Chapter 9 to find out more about those requirements.

Tracking tasks

Planner isn't just for building a plan and creating tasks. It's also the tool you use to track how your plan is progressing. You probably want to know how many tasks are complete, who completed them, how many are left, and so on. Figure 1-6 shows the Charts view, which gives you that type of information.

FIGURE 1-6:
The Charts
view provides
information
about your
plan's progress.



I admit that the information in the Charts view is a bit rudimentary, but even so, it offers a concise view of your project's status. There are some other ways to visualize progress that requires exporting the data out of the plan. Check out Chapter 15 to find out more.



Microsoft Planner For Dummies covers the Planner Basic Plan and Planner Plan 1. The Basic Plan is limited to the reporting features provided by the Charts view (unless you export the data for visualization in another application). Plan 1 adds a Timeline view, which is a Gantt chart that shows task duration along a timeline. Plan 1 and other versions, explored in more detail in Chapter 2, offer more features for charting, visualizing, and reporting.

Integrating with other applications

Planner is a great tool for organizing your personal projects, but it's also great for projects that you plan and deliver with a team of other people. I spend most of my day in Outlook and Teams, collaborating with coworkers as well as customers. Planner offers integration features with other applications, including Teams and Outlook. Figure 1-7 shows an example of the Planner app in Teams, where I'm viewing the tasks assigned to me.

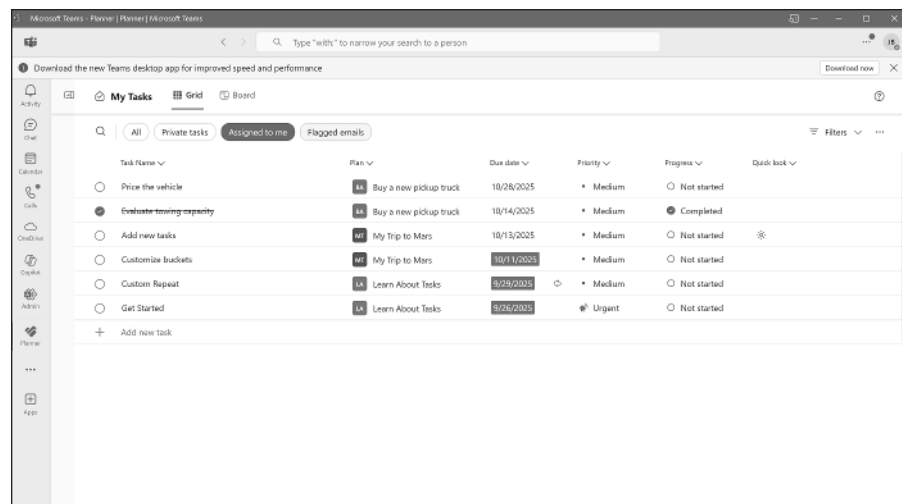


FIGURE 1-7:
My assigned
Planner tasks
in Teams.

Using Planner in Teams is just like using it in a web browser, which means that if you work in Teams a lot, you don't have to open a separate window to manage your tasks. Planner also integrates in other ways with Teams, including the capability to add Planner as a tab in a team, receive task notifications in Teams, and integrate Planner and Microsoft SharePoint for plans that are linked to Teams sites.



TECHNICAL
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In a nutshell, SharePoint is a solution for creating and publishing websites that enable organizations to share documents, publish web content, and collaborate in other ways. SharePoint also provides tools for workflow automation (like document-approval processes), content management and governance, storing information in SharePoint lists, and much more. For more information on SharePoint, Chapter 19 is a good place to start. Or search for “Microsoft SharePoint features” using your favorite search engine or AI tool.



TIP

Integrating Planner with Teams and Outlook isn’t particularly difficult, but you do need to set it up. When you’re ready to do that, turn to Chapter 8.

Investigating Planner Use Cases

Now that you have a sense of what Planner can do, you’re ready to explore some of the use cases where Planner can be a great planning and task management tool. You may already have ideas for what you want to use Planner for, but the following sections can help you expand your horizons and maybe integrate Planner into your personal life, as well as work.



TIP

Not familiar with the term *use case*? It’s simple. A *use case* describes how a user or system interacts with a product, process, or service to reach a goal. Think of a use case as describing how you may use Planner in different situations to achieve different types of goals. I like the hammer analogy: You can use a hammer to pound in nails or pry them out, pry boards apart, open walnuts and coconuts, pretend it’s a microphone, or vent your frustrations (only on inanimate objects like coconuts, please). All those are use cases for a hammer. Nailed it!

Personal achievement

Most of us, whether we externalize them or not, have personal goals that we want to achieve. I could stand to lose about 40 pounds of fat and gain 10 pounds of muscle. But I probably won’t be successful without a plan that includes changing what I eat, exercising, getting lots of sleep, and hydrating. That plan should include a regular exercise schedule, instead of just a task called Exercise!

Don’t take this as fitness advice, but I should combine cardio, weight training, and endurance exercises into my plan, scheduling them each week. Maybe Monday should be lower-body training, Tuesday high-intensity cardio, Wednesday upper-body training, Thursday walking, Friday abs day, and Saturday more high-intensity cardio. Sunday would, of course, be lying-on-the-couch day, because now I can barely move. (Maybe you can understand why I need to lose some weight.)



WARNING

I'm an overweight, out-of-shape IT geek and author, so don't take fitness advice from me! Consult your doctor before you start any kind of weight-loss or exercise plan. While you're there, get their advice on a good fitness plan that you can build into Planner. I bet they even have a pamphlet they can give you to get started!

Here are some examples of personal achievement use cases for Planner:

- » **Health and fitness:** Weight loss is just one scenario where you may want to create a personal plan. Maybe you want to learn or get better at yoga, gain some muscle, run a marathon, or get washboard abs. All these goals deserve a plan.
- » **Career advancement:** This scenario may take the form of achieving a work-related certification, changing roles, earning a promotion, becoming a leader or people manager, or expanding your network. Chart a path to that goal with a good plan.
- » **Financial milestones:** Remember that new pickup truck I wanted to buy earlier in this chapter? Great example, if I do say so myself! Saving to buy a house, paying off a mortgage, paying down debt, and building or expanding your investment or retirement plans are all good examples of planning for financial milestones that need a plan that fits your goals.
- » **Education:** This could encompass a work-related certification, working toward a degree, learning a new skill or musical instrument, or upskilling in your favorite hobbies.
- » **Personal skills development:** Do you want to improve your public speaking skills without relying on written speeches? That's a great example of personal skills development. Improving your time management abilities, gaining leadership skills, and improving your writing skills are all good examples of personal skills development.

Course planning

I spent seven years as an instructor at a technical college teaching mechanical drafting, programming, and computer-aided design. I did a lot of course planning during that time and have done some additional course-planning delivery in other roles, including the one I'm in now. You wouldn't walk into a classroom on day one of a quarter or semester without a plan! That plan needs to detail the syllabus, the learning objectives to cover, what testing measures you'll use throughout the course, and what the final assessment will be to make sure your students have achieved an appropriate level of success in the course.

Planning a course can be a bit different from planning an event or “traditional” project. For example, each task can describe a single lesson plan, using the due date as the date on which you finish delivering the lesson. Use buckets to describe the course objectives and place lesson-plan tasks in their respective buckets. Use notes to describe the lesson plan and any resources or references required for delivering it. You can also attach Uniform Resource Locator (URL) links (otherwise known as website addresses) or documents to a task to incorporate external content into the lesson.



TIP

You can insert a link in a task regardless of which version of Planner you’re using. Plans that are integrated with Teams add the capability to attach documents from SharePoint libraries associated with the team. If your plan wasn’t created within a Microsoft 365 group or in Teams, but you still want to link to a document stored in SharePoint or some other location, open the document in a browser, copy the URL, and then insert that URL in your task.

“What about assignments?” you ask. You can include student tasks in your course plan and assign them to your students. Unfortunately, Planner supports assignment of a single task to a maximum of 20 people. If your class head count is 20 or fewer, you’re in luck. However, keep in mind that if only one of your students marks the task as complete, it’s complete and disappears from the My Tasks view for all students.



TIP

A task in Planner is a single shared item. Even if standard task assignment in Planner isn’t geared toward individual completion by your students, it can still be useful. For example, you could divide the students into smaller groups, each responsible for a particular task within the plan. When the group finishes the task, they can mark it as complete *for the group*.

So, assignment is a tough nut to crack for this use case. Here are some suggestions on how to overcome this limitation:

- » **Manually copy the task.** You can copy the task *n* number of times, one for each student, and then assign them individually. That’s a lot of work with a large class!
- » **Automate task creation with Microsoft Power Automate.** You can build a flow using Power Automate that loops through a list of student names and creates and assigns a task to each one. That’s a great solution, but it requires a little bit of setup and an understanding of how to use Power Automate (see Chapter 13).

» **Consider an alternative solution.** Planner may not be the best choice if you have a large class and want to assign tasks to each student. A learning management system (LMS) or other solution may work better for that aspect of the course. Or you could still build your course plan in Planner, but use a complementary solution for assigning tasks.

Event planning

This use case is straightforward: You want to plan a wedding, birthday party, or other big event. I use a wedding in this example, which would likely include the following bodies of work:

- » Budget
- » Ceremony location
- » Reception venue
- » Weather backup plan
- » Guest list
- » Caterer
- » Photographer and videographer
- » Attire
- » Décor
- » Vendors
- » Invitations and stationery
- » Music
- » Legal stuff

There is no right or wrong way to structure a wedding plan in Planner, but here are some suggestions (keeping in mind that I know Planner, but I am in no way, shape, or form a wedding planner):

» **Use buckets to organize the various bodies of work.** Each of the items I list earlier would have its own bucket, with additional buckets added for the things I (or you) haven't thought of yet. Within the Venue bucket, for example, lay out the tasks necessary for choosing the venue, pricing it, reserving it, decorating and cleaning it, and so on.

- » **Rely on checklists.** Use checklists to define the individual actions that need to be completed within the overall task.
- » **Include contingencies in each task or bucket.** Something will inevitably go wrong with the plan, so build in contingencies at the task level, bucket level, or both.

Project planning

Some people may think of this use case as the primary one for Planner, but I see it as one of many — but also one that covers many scenarios. I use *project planning* in this context to mean a project that delivers a tangible product or service in a business environment. This could include building or renovating a house, developing and delivering a software application, performing a data-center migration, launching a new product, and much more.



REMEMBER

I'll admit that project planning can encompass *anything* that needs a plan. So, all the use cases I describe in this chapter are examples of project planning. But I include this use case to contrast projects that deliver tangible *things* from those that deliver an *end result*.

Although this use case might be the most common, it's also the one with the most variability in how you build the plan. That's because it covers so many possibilities. The plan for launching a new software application is very different from the plan for building a house. Even so, all these projects can use buckets to organize tasks, have tasks with start and end dates, need task owners, and potentially include open-ended tasks that you plan for after the project's completion.

Student projects

Planning an educational course is different from planning a student project, but a student project will often follow or be a key part of a course. For example, assume you're teaching a course on framing for home construction. You'll likely deliver the course as classroom instruction interspersed with hands-on learning. You start with a module on floor systems; then you go out and build the first floor. Next comes a module on wall systems, followed by raising of the first-floor walls. You wouldn't teach the whole course in one go and then go build the house, because by the time you've explained the relevant parts of the residential building code and how to frame the whole house, your students have forgotten the right way to tie the rim joists to the foundation.

In this example, you'd create hands-on sessions as individual plans that you'd link to the overall course plan. The floor system would have one, the wall system another, roof framing a third, and so on. Although you could set up the entire construction phase as a single plan, breaking it into smaller components not only makes it easier to focus on specific modules, but can make it easier to address changes. Breaking it into several smaller plans also makes plan development a less daunting task.

That's the way I would do it in an educational setting, but that's often not the case in the construction trade where you're planning for a project that will be completed by skilled tradespeople. In many cases, a residential construction project is backed by a single, comprehensive master plan that includes all the major systems. More complex projects, such as multiunit housing and larger commercial projects, have a master plan for the entire project with sub-plans for each system (structural, electrical, plumbing, and so on).

Now consider other types of student projects, such as science projects. These are certainly less complex than a building project, but they still need a plan. In this scenario, create a plan that covers the specific science module and include a bucket in that plan for the student's creation of their project.



TIP

Here's the key: Have each student create their own plan for their project. This, more than anything, will help reinforce the topic and also help them organize their thoughts and deliverables.

Business planning

I confess that I've jumped into businesses without a plan. For example, I once owned a small internet service provider (ISP) business. I would joke that it didn't go as planned, but I *didn't* plan, which explains why I no longer own an ISP! Whether you're planning to start a home-based business or something that will need a manufacturing facility and employ lots of people, you should start with a solid business plan.

Fortunately, Planner includes a Business Plan template that takes you through a thoughtful analysis and assessment that includes the following:

- » Performing a self-assessment
- » Defining the opportunity
- » Evaluating a business approach
- » Evaluating risks and rewards

- » Finalizing a strategic plan
- » Defining the market
- » Building a five-year business plan



TIP

Chapter 11 explains Planner templates in general and explores the various templates that are included with Planner.

Your plan may not include all those buckets, or it may contain more, depending on the size, scope, and purpose of your business. In any case, the business plan serves as the mechanism for you to explore what the business will be, how you'll build and deliver it, what skills you'll need, and so much more. Last, don't skimp on your first five-year plan. If you do, you'll find yourself reacting to your business rather than guiding it as both you and the market change.



TIP

Why do I call it your *first* five-year plan? Successful businesses are constantly planning for the future. Even if you're planning a small, hobby-based business, you'll want that business to not only grow and flourish but also adapt to all sorts of potential changes. Planning your business's future over the long term is the best way to ensure long-term success.

Thinking about How You Want to Use Planner

If you've read this chapter from the beginning, you probably have a good sense of how you can put Planner to work in any number of ways. You've probably thought of variations on the use cases I describe and come up with a few of your own. That's the beauty of a good organizational tool like Planner. It doesn't force you into a rigid framework. Instead, it offers the flexibility you need to create any type of plan, map tasks to the plan, and work toward an end goal.

This chapter explores what Planner is and looks at some common scenarios in which you may use it. A good next step at this point is to pause and think about how you want to use Planner, at least for your first project. Start by defining your end goal. Sketch out some buckets that make sense for your project and come up with some tasks for each. Think about how all that drives your project forward to completion. You'll then have a framework in which to better understand the topics in the rest of this book.

