

MICROSOFT PLANNER CHECKLIST: BOOST YOUR PRODUCTIVITY!

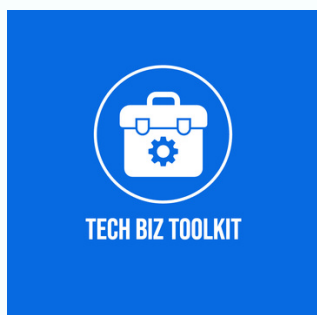


1. SET UP YOUR PLANNER

- ☐ **Create a new plan** for each project or initiative.
- ☐ **Add team members** to the plan for collaboration.
- ☐ **Set a clear plan** description to outline objectives and scope.
- ☐

2. ORGANISE TASKS EFFECTIVELY

- ☐ **Break down tasks** into smaller, actionable items.
- ☐ **Assign tasks** to team members with clear deadlines.
- ☐ **Use custom labels** to categorise tasks (e.g., Priority, Department, Stage).
- ☐ **Add task details** such as descriptions, checklists, and attachments.



3. LEVERAGE TIMELINE VIEW

- ☐ **Switch to Timeline View** to visualise your project.
- ☐ **Drag and drop tasks** to adjust deadlines and dependencies.
- ☐ **Highlight critical paths** to identify key milestones.

4. INTEGRATE WITH MICROSOFT TEAMS

- ☐ **Add Planner to your Teams channel** for seamless collaboration.
- ☐ **Assign and update tasks** directly within Teams.
- ☐ **Enable notifications** to stay on top of task updates

5. MONITOR PROGRESS

- ☐ **Use the Charts View** to track task completion and team workload.
- ☐ **Filter tasks** by label, assignee, or progress status.
- ☐ **Review overdue tasks** and re-prioritise as needed.

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6. OPTIMISE FOR BUSINESS CHANGE MANAGEMENT

- ☐ **Create a "Change Readiness"** bucket to track stakeholder engagement tasks.
- ☐ **Use labels for risk levels** (e.g., Low, Medium, High) to monitor potential issues.
- ☐ **Schedule regular check-ins** using Planner updates to ensure alignment.

BONUS: QUICK START GUIDE

- ☐ **Create a Plan:** Click "New Plan" and name it.
- ☐ **Add Tasks:** Click "Add Task" and assign it to a team member.
- ☐ **Customise:** Use labels, buckets, and deadlines to organise tasks.
- ☐ **Track Progress:** Switch between Board, Charts, and Timeline View

7. ADVANCED TIPS

- ☐ **Export Planner tasks to Excel** for reporting or offline review.
- ☐ **Use @mentions** in task comments to flag specific team members.
- ☐ **Archive completed plans** to keep your workspace clutter-free

DOWNLOAD INSTRUCTIONS

- ☐ **Save this checklist as a PDF or Word document.**
- ☐ **Share it with your team or use it as a personal productivity tool.**
- ☐ **Print it out or keep it digitally for easy reference.**

