



COLLEGE AFRICA GROUP

AI | TRAINING | CONSULTING | SKILLS DEVELOPMENT

Better Processes. Stronger Skills. Smarter AI.

Microsoft Planner Core Essentials

Team work is tracked in emails, spreadsheets and memory. Things slip.

Practical team task and plan management

Duration: One day | **Level:** Beginner / foundation | **Delivery:** Onsite or virtual

The business problem

Teams coordinate work through email threads, WhatsApp messages and spreadsheets. Nobody has one view of who is doing what, by when, and what is late.

Microsoft Planner is already included in most Microsoft 365 business subscriptions, but few teams use it properly.

You need this course if...

- Tasks are allocated by email and then lost
- Managers chase people for status updates
- Deadlines are missed because nobody saw them coming
- You have Microsoft 365 and Teams but no shared task system
- You are moving away from heavier project tools for everyday team work

How this course solves it

This one-day, instructor-led course shows employees, team leaders and coordinators how to use Microsoft Planner to organise team work, assign and track tasks, and keep everyone informed.

Delegates build and manage a realistic workplace plan from start to finish, working hands-on after each facilitator demonstration.

Who should attend?

- Employees who work in teams and share tasks
- Team leaders and supervisors
- Coordinators and administrators who track work for others

Software: a Microsoft 365 account with access to Microsoft Planner (basic plans are included in most Microsoft 365 business subscriptions). Access to Microsoft Teams is recommended.

Course content

1. Getting Started with Planner

- What Planner is and where it fits in Microsoft 365
- Basic plans and premium plans
- Opening Planner in the browser and in Microsoft Teams

- Signing in, the Home screen and navigation

2. Creating a Plan

- Creating a basic plan and a plan from a template
- Adding members
- Pinning a plan and changing plan settings

3. Organising Work with Buckets

- What buckets are and how to use them
- Creating, renaming, reordering and deleting buckets

4. Creating and Managing Tasks

- Adding tasks in Board view and Grid view
- Assigning tasks; setting start and due dates
- Setting progress and priority
- Moving, copying and deleting tasks

5. Adding Detail to Tasks

- Notes and checklists
- Attaching files and links
- Labels and recurring tasks
- Discussing a task with task chat

6. Viewing Your Plan

- The four plan views
- Schedule view and Charts view
- Grouping and filtering tasks
- Showing and hiding columns in Grid view

7. My Day and My Tasks

- Using My Day and My Tasks
- Creating private tasks
- Working with flagged e-mails

8. Collaborating with Your Team

- Adding a plan to a Teams channel
- Understanding notifications
- Working with guests
- Using Planner on a mobile phone

9. Sharing and Managing Plans

- Exporting a plan to Excel
- Duplicating a plan and publishing it as a template
- Deleting a plan

Practical Workplace Application

Delegates work through one realistic workplace plan across the day, applying each skill as it is demonstrated. Review questions at the end of each module reinforce the key points.

After the course

Delegates will be able to:

- Explain where Planner fits in Microsoft 365 and the difference between basic and premium plans
- Create plans from scratch and from templates, and add members
- Organise work into buckets
- Create, assign, schedule and prioritise tasks
- Add notes, checklists, files, labels and recurring tasks
- Use Board, Grid, Schedule and Charts views to monitor progress
- Manage personal work with My Day and My Tasks
- Collaborate through Teams, notifications and guest access
- Export, duplicate, template and close plans

Training format

Duration: One day

Delivery: Private onsite training or live virtual training

Approach: Facilitator demonstrates, then delegates practise hands-on

Certificate: Electronic attendance certificate

Planner pathway

Microsoft Planner Advanced — Premium Project Planning and Control

For delegates who need to schedule and control projects with dependencies, critical path, baselines and workload management.

Next step

To book this course for your team, or to discuss a version tailored to your organisation, contact Arnold Muscat on 083 778 4903 or sales@collegeafricagroup.com.

Course page: collegeafricagroup.com/microsoft-planner-training/ | [What our clients say about us](#)

Regards

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