

Planner Training: Mastering Project and Task Management

Module 1: Advanced Task Tracking

- Use the **Charts view** to monitor overall progress
- Use the **Calendar view** to track due dates
- Group and filter tasks (by assignee, priority, or status)

Module 2: Structuring Complex Projects

- Naming conventions and logical organization of buckets
- Distributing roles and tasks by department or project phase
- Best practices for long-term or cross-functional projects

Module 3: Multi-Team Collaboration

- Manage multiple plans within a shared environment
- Track contributions from different teams
- Coordinate across departments and project owners

Module 4: Useful Integrations

- Link Planner to Outlook to track personal tasks
- Combine usage with Microsoft To Do
- Store and centralize documents using SharePoint

Module 5: Usage Optimization

- Tips to reduce unnecessary notifications
- Organize tasks by milestones, sprints, or activity types
- Best practices for plan readability and clarity

Module 6: Practical Cases and Group Discussions

- Apply concepts to a real-world case suggested by participants
- Group or individual demonstrations
- Feedback and sharing of best practices