Using Microsoft 365 Planner to Manage Projects and Engagements

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Presentation Outline

➢ [Planner App Overview](#)

➢ [Group Case Study](#)

➢ [Wrap-Up](#)

Planner App Key Features

Simple and intuitive interface

Useful for project and event planning

Integrates with many Office 365 apps

Tasks can be assigned to external users

Visual progress reporting tools

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Anatomy of A Plan

Plans

Tasks and checklists

Task board

Progress charts

Plan schedule

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Group Lab Exercise

➢ Create a plan

➢ Create buckets

➢ Create tasks

➢ Assign tasks

➢ Attach documents

➢ Add plan to Outlook calendar

➢ Measure progress

WRAP-UP

Presentation Wrap-Up

➢ Practical for managing small group projects

➢ Planner is both flexible and intuitive

➢ Tasks can be assigned to external parties

➢ Integration with other Office 365 apps enhances the functionality

➢ Start simple and grow from there

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Questions ?

THANK YOU!

We hope you enjoyed this presentation. To learn more about CPA Crossings visit
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