

Microsoft Planner

Microsoft Planner is a flexible collaboration tool. It provides reports, is accessible all plan members, and can be configured to suit the goals and needs of planners (Loqutus).

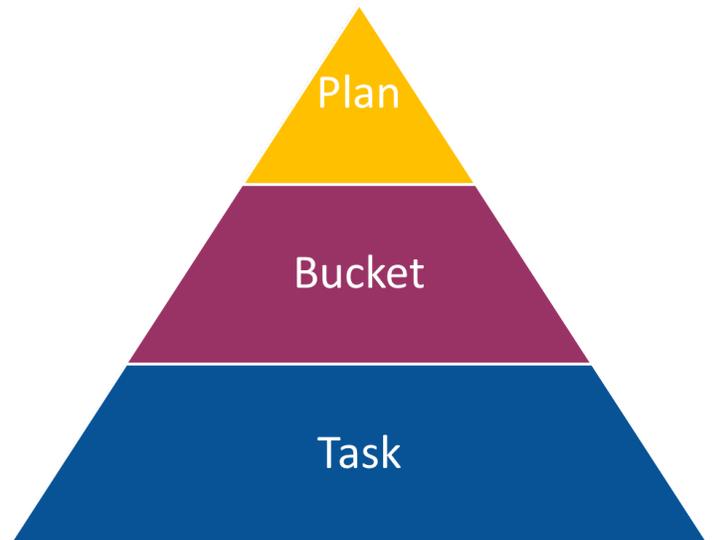
According to Microsoft;

“Planner makes it easy for your team to create new plans, organize and assign tasks, share files, chat about what you’re working on, and get updates on progress.”

What is a plan?

Plans contain three levels:

- **Plans:** The highest level is the plan itself. You can create a plan for your project, for your team, for an event, or whatever you would like to plan.
- **Buckets:** Each plan contains buckets. A bucket can be seen as a set of tasks. In your project plan, for example, you can have a bucket 'Project management', 'Analysis', 'Development', 'Testing', and so on. Another possibility is to name your buckets after the different teams that should collaborate.
- **Tasks:** The third level are the tasks themselves, created within a bucket. Tasks have three properties: the *task name*, the *assignee* and the *deadline*.



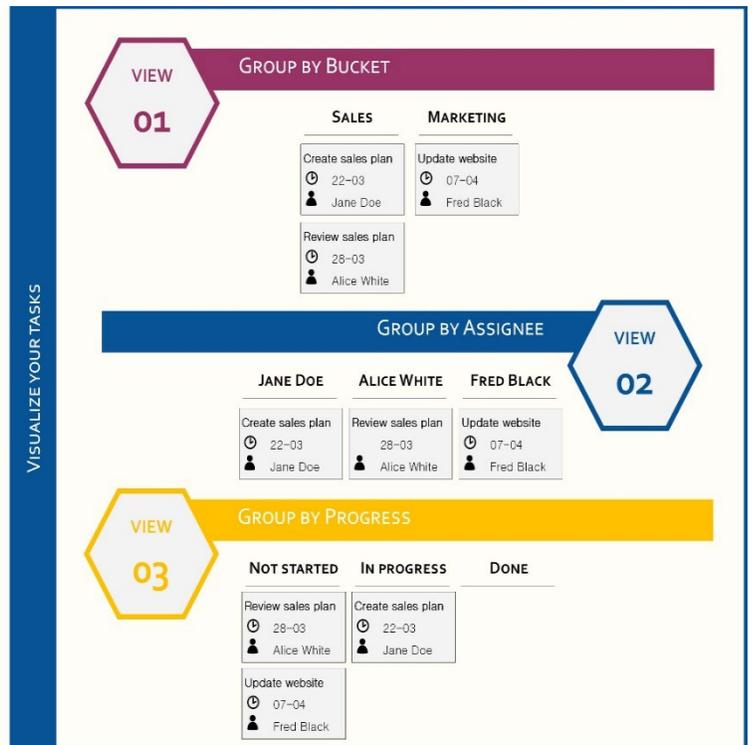
Plans

For each plan, you define who may participate. This group of people will be able to see the plan, edit the plan and be assigned tasks. Each plan can be assigned to different users, and each plan includes its own SharePoint drive and calendar. With these features, plans take on the characteristics of a group. You can develop multiple plans with buckets and tasks, or create a few plans, and assign multiple buckets to each plan. For example, you can have a plan for each project, or you can develop a working group, and then develop one plan with multiple buckets for each project the group will undertake.

Buckets

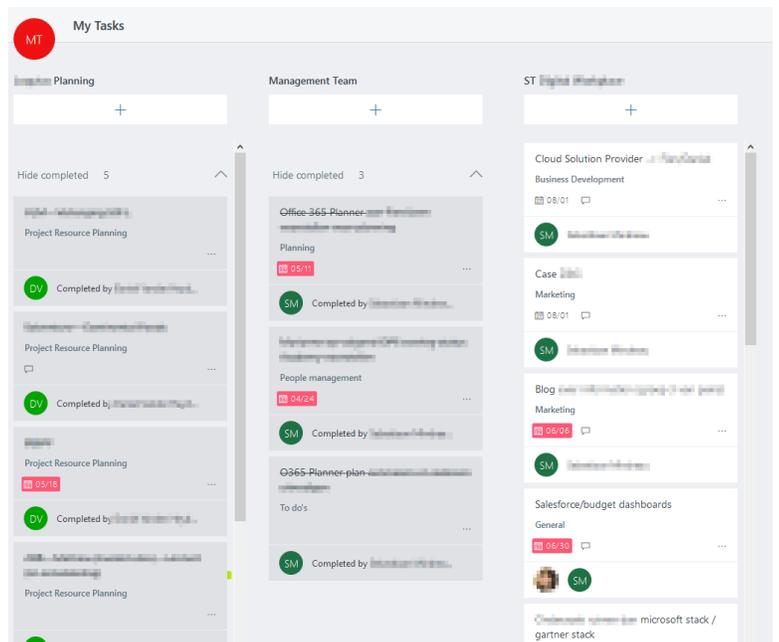
As noted, buckets contain sets of tasks. Buckets can be arranged by type of task, task assignee, or progression. It is best to arrange buckets so that they can be visualized. Planner allows visualization based on the types of views offered. There are 3 different views of your plan: grouped by bucket, by assignee or by progress.

When your buckets are named after the teams that are collaborating on the project, grouping by bucket makes sense. It provides you with an overview of all tasks per team, so you can quickly see where potential bottlenecks arise, or which team ran out of work. Grouping by assignee is helpful when team members want to consult their own task list. It is more used on an individually base. Everyone can see the list of his tasks with the deadlines. Finally, grouping by progress is effective to have a view on the overall progress of your plan.



Tasks

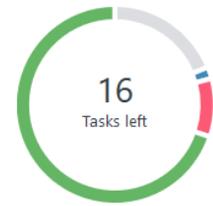
Once we have set up a plan and created our buckets, it is time to add the tasks to our buckets. As noted above, tasks have three properties: the *task name*, the *assignee* and the *deadline*. Furthermore, within a task, you can keep plenty of additional information in order to keep the whole team informed on the progress, the content, and so on. There is also a "My Tasks" link available that shows you all of your tasks across plans. Tasks can be grouped by plan or progress.



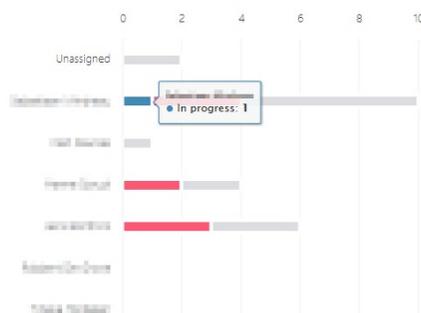
Reports

Planner also includes a feature that allow for the ability to report on your plan. To this end, Planner provides two easy-to-read graphs.

The first graph shows the progress of your entire plan. You can see how many tasks are not yet started, are in progress, are too late or are completed. By clicking on one of the four colors in the graph, you retrieve a list of the related tasks and you can navigate to the details of a specific task. This graph is very helpful because you can interactively focus on the tasks that are late. In a team meeting, this graph is used to ask questions like "Why is this task too late?", "What has gone wrong?", "Are there additional actions required?", and so on.



Not started	10
In progress	1
Late	5
Completed	37



The second graph is a more detailed version of the first graph: it adds a grouping by assignee. This visualization is suitable for project management, because it answers a lot of questions. E.g. "Who is overwhelmed with work?", "Who is always delivering late?", "Who does not have much work?", and so on. You know what everyone is up to and you can help out where needed.

Best Practices

- Use buckets for teams and for the different aspects of what you're planning. E.g. for an event, create plans for catering, content, location and decorations
- If creating a bucket for your team, use task priorities or types for categories.
- Set up fixed moments (say, weekly), for your team to go over the board together. Discuss open tasks, upcoming deadlines, tasks that are late. This keeps communication channels open, everyone is aware of what's on the board and you make sure the board stays clean and up to date.
- It is possible to assign multiple people to a task, but make sure that it is clear to everyone who takes the lead on a task and what is expected of the different assigned people.

References

Loqutus. *The Hidden Gem in Office 365: Planner*. 29 January 2018. Internet. 10 July 2018. <<http://www.loqutus.com/content/hidden-gem-office-365-planner>>.