

Microsoft 365 Planner Premium 1 Training

Course Description

This practical training program provides an in-depth learning experience on Microsoft 365 Planner. Participants will gain hands-on exposure to creating plans, organizing tasks, assigning work, tracking progress, and collaborating effectively within Microsoft 365 environments. The course focuses on using Planner for team productivity, work management, and project coordination.

Audience Pro

This course is ideal for Project Coordinators, Team Leaders, Functional Managers, PMO members, Microsoft 365 Users, and anyone involved in planning, delegating, or monitoring work activities within an organization.

Prerequisites

Participants should have basic familiarity with Microsoft 365 applications and general understanding of team collaboration concepts. Prior exposure to tools like Teams or Outlook is helpful but not mandatory.

Course Objectives

By the end of this course, participants will be able to:

- Create and manage plans, buckets, and task assignments
- Track task progress and visualize workload efficiently
- Collaborate with team members using comments, files, and notifications
- Integrate Planner with Microsoft Teams and To Do for unified task management

Module 1: Planner Fundamentals

Learning Objectives

1. Introduction to Microsoft Planner and use cases
2. Planner components – plans, buckets, tasks
3. Task assignment, priority, and progress
4. Views – Board, Charts, Schedule
5. Using labels and checklist items
6. Basic reporting and filtering
7. Standard integration with Teams and To Do

Exercise:

Create a standard plan, add tasks, group by buckets, and analyse using Charts view.

Module 2: Transition from Planner Standard to Planner Premium

Learning Objectives

1. What Planner Premium adds beyond standard Planner
2. Licensing overview and access paths
3. Planner Premium interface introduction
4. Mapping premium features to project management needs
5. Comparison with Microsoft Project
6. When to upgrade and when not to
7. Organizational adoption considerations

Exercise:

Convert an existing plan to Planner Premium and identify added capabilities.

Module 3: Timeline (Gantt) and Task Dependencies

Learning Objectives

1. Using Timeline view for project planning
2. Creating task dependencies (Finish-to-Start etc.)
3. Defining milestones & critical path concepts
4. Adjusting task durations and start dates
5. Impact of dependency changes on schedules
6. Managing slippage and delays
7. Baselines and rescheduling techniques

Exercise:

Build a project schedule with dependencies and reschedule impacted tasks.

Module 4: Advanced Task Details & Custom Fields

Learning Objectives

1. Creating custom fields (text, number, date, dropdown)
2. Using fields for risk, cost, effort, and category indicators
3. Tracking time estimates and work remaining
4. Attaching documents and references
5. Task history and change tracking
6. Using premium templates
7. Backlogs and sprints

Exercise:

Create custom fields for risk, effort, and owner type; track progress across them.

Module 5: Goals, Programs

Learning Objectives

1. Creating organizational goals
2. Linking tasks and plans to goals
3. Tracking KPIs and outcome metrics
4. Program grouping and reporting
5. Cross-department views and governance

Exercise:

Create goal hierarchy and link project tasks to goal outcomes.

Module 6: Automation & AI Features

Learning Objectives

1. Premium automation templates
2. Task automation with dependencies
3. AI-based task suggestions (where available)
4. Notifications and rule-based reminders
5. Integration with Power Automate for premium plans
6. Auto-assignment models
7. Status update automation

Exercise:

Create an automated rule to notify stakeholders when a milestone is delayed.

Module 7: Reporting, Analytics & Dashboarding

Learning Objectives

1. Advanced reporting views
2. Portfolio dashboard options
3. Using Power BI with Planner Premium data
4. Export & archive capabilities
5. Tracking trends and historical data
6. Executive project status reports
7. Sharing dashboards securely

Exercise:

Build a project status dashboard using Planner Premium analytics.

Module 8: Security, compliance, data privacy & Microsoft 365 customer support

Learning Objectives

1. Permissions and access governance
2. data privacy
3. Guest user scenarios
4. Data residency and retention considerations
5. Compliance considerations for Planner Premium
6. Ownership transfer and orphaned plans
7. Admin controls for premium features
8. Microsoft 365 customer support

Exercise:

Configure plan governance settings and simulate plan archival scenario.