

## Managing Tasks & Work in Microsoft 365

### OVERVIEW

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The **Managing Tasks & Work in Microsoft 365** course focuses on helping individuals and teams plan, organise and track work using Microsoft 365 tools.

Designed for users who are familiar with core applications, this course introduces practical approaches to managing tasks and improving visibility of work across teams. Participants will learn how Microsoft Planner, Microsoft Teams and other tools can be used together to support structured and accountable work management.

Emphasis is placed on using simple, consistent approaches to managing tasks, tracking progress and ensuring work is clearly visible and effectively coordinated across individuals and teams.

### LEARNING OUTCOMES

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

- Understand how tasks and work are managed across Microsoft 365
- Use Microsoft Planner to create, organise and track work
- Structure plans, buckets and tasks effectively
- Assign tasks and manage responsibilities within a team
- Track progress and manage deadlines
- Use Planner within Microsoft Teams
- Improve visibility and accountability of work
- Coordinate tasks across individuals and teams
- Apply consistent approaches to task and work management

These outcomes support improved organisation of work, clearer accountability and better coordination across teams.

### DURATION & DELIVERY

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The duration of this course is typically **3–4 hours or 1 day**, depending on the level of depth and practical exercises included.

This course can be delivered in a range of formats to suit your team:

- **Onsite training** - delivered at your workplace
- **Live online training** - delivered virtually in real time
- **Hybrid delivery** - a combination of onsite and online participants for teams working across multiple locations

All training is delivered by experienced Microsoft 365 specialists with a focus on practical, real-world application.

## PREREQUISITES

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Participants should have a basic understanding of Microsoft 365 applications and experience using tools such as Teams and OneDrive in a work environment.

## COURSEWARE

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Learning materials are available for purchase at the time of booking. These may include training materials, reference guides or supporting resources, depending on the course.

While Microsoft 365 continues to evolve, the principles of effective task and work management remain consistent. Trainers incorporate current features and examples to ensure participants receive practical and relevant guidance.

## MICROSOFT 365: MODERN WORKPLACE TRAINING PATHWAY

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Our Microsoft 365 Modern Workplace training is designed to help individuals and teams work more efficiently, collaborate effectively, and get better value from the tools they use every day.

All courses can be delivered as outlined below, or we can customise a training program to ensure your team completes the exact topics they need in the timeframe that best suits your organisation.

### MODERN WORKPLACE COURSES

- **Getting Started in Microsoft 365** – Build confidence using the core Microsoft 365 applications, including Outlook, OneDrive, Word, Excel, OneNote, and Teams. Ideal for new users or those requiring a strong foundation.
- **Working Smarter with Microsoft 365** – Improve personal productivity by managing email, organising work, structuring files, and building efficient daily workflows across Microsoft 365 applications.
- **Collaborating Effectively in Microsoft 365** – Transform how teams work together using Microsoft Teams, shared files, and real-time collaboration tools, with a focus on reducing reliance on email.
- **Managing Files & Information in Microsoft 365** – Learn how to organise, store, and manage documents across OneDrive and SharePoint to reduce duplication and improve accessibility.
- **Modern Work Habits with Microsoft 365** – Develop better ways of working by improving communication practices, managing meetings effectively, and using the right tools for the right tasks.
- **Managing Tasks & Work in Microsoft 365** – Use Microsoft Planner as a central tool to assign, track, and manage work across teams, improving accountability and visibility.
- **Using Copilot in Microsoft 365** – Leverage AI capabilities to enhance productivity across Microsoft 365 applications, including drafting content, summarising information, and analysing data.

## COURSE DETAIL

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### Understanding Task & Work Management in Microsoft 365

- How tasks are managed across Microsoft 365
- Overview of Planner and its role in team productivity
- Common challenges in managing work across teams
- Moving from informal to structured task management

### Getting Started with Microsoft Planner

- Creating and managing plans
- Understanding buckets and task organisation
- Creating tasks and setting priorities
- Using labels and categories

### Assigning & Managing Work

- Assigning tasks to team members
- Setting deadlines and tracking progress
- Updating task status
- Supporting accountability across teams

### Using Planner within Microsoft Teams

- Accessing Planner in Teams
- Linking tasks to conversations and files
- Working collaboratively within a team environment
- Keeping work connected and visible

### Tracking Progress & Work Visibility

- Monitoring task progress
- Using views and filters
- Identifying bottlenecks and delays
- Improving visibility of team workloads

### Coordinating Work Across Teams

- Managing tasks across multiple people
- Supporting communication and coordination
- Avoiding duplication of effort
- Maintaining a clear view of work

### Applying Consistent Work Practices

- Establishing simple task management approaches
- Creating repeatable processes
- Supporting long-term consistency
- Embedding effective work habits