Guide to Setting Up Microsoft Teams Planner for Project Management

Microsoft Planner is a simple, visual task management tool integrated with Microsoft Teams. It helps project teams organise work, track progress, and improve visibility without needing a full project management system.

1. Before You Start

Make sure:

- • You have a Team already created for your project.
- • You have appropriate permissions to add new tabs/apps.
- • You've agreed the basic project structure (phases, workstreams, roles, reporting).

2. Create Your Planner

1. Go to your project Team in MS Teams.
2. Click the "+" (Add a tab) icon at the top of your channel.
3. Select Planner (or Tasks by Planner and To Do).
4. Choose Create a new plan and give it a clear name, e.g. "NHP Estates Workstream Plan".
5. Tick 'Post to the channel about this tab' if you want to notify members.

3. Set Up Buckets (Your Workstreams or Phases)

Buckets act like columns on a Kanban board. Typical NHS/ICS project buckets might include:

- Initiation
- Planning
- Delivery
- Monitoring
- Closure

Or you can create buckets by workstream, e.g.:

- Clinical Engagement
- Finance and Benefits
- Digital and Data
- Estates and Infrastructure
- Communications and Change

4. Add Tasks

For each bucket:

6. Click '+ Add task'

7. Give it a clear action title (e.g. ‘Draft Business Case’)
8. Add a due date and assign it to one or more team members.
9. Click the task to open the detail view and:

In the detail view, you can:

- Add a description
- Break down into checklist subtasks
- Attach files or links (e.g. SharePoint documents)
- Add labels (e.g. Urgent, Dependencies, Risk-related)

5. Track and Review Progress

Use the ‘Board’, ‘Charts’ and ‘Schedule’ views to monitor activity:
• Board – visual Kanban view for status updates.
• Charts – summary of completed, in-progress, and late tasks.
• Schedule – calendar view to check upcoming deadlines.

Encourage weekly updates in project meetings – e.g. ‘Let’s review Planner to update task progress and blockers.’

6. Link to Project Governance

• Use Planner progress charts in your highlight reports or PMO dashboards.
• Create a Planner per workstream or one shared across the whole project.
• Align task buckets to RAID logs or benefits plans if needed.

7. Tips for Good Practice

- Keep task names short and action-oriented (‘Prepare presentation for SRO’).
- Use labels consistently (e.g. red = high risk, green = on track).
- Update regularly – stale boards lose value quickly.
- Use Comments for quick updates instead of long emails.
- Sync with Outlook tasks via ‘My tasks’ view for personal follow-up.

8. Optional Integrations

- Link to SharePoint for document storage.
- Use Power Automate for reminders or notifications.
- Connect to MS Project or Power BI dashboards for portfolio-level visibility.

9. Example Naming Conventions

Element	Example
Planner Name	ICS Workforce Programme – PMO Tracker
Buckets	Initiate, Plan, Deliver, Close

Labels	Red = Risk, Blue = Finance, Green = Complete
Tasks	Submit business case to CFO / Draft comms plan