

# Microsoft Planner

## Day in the life

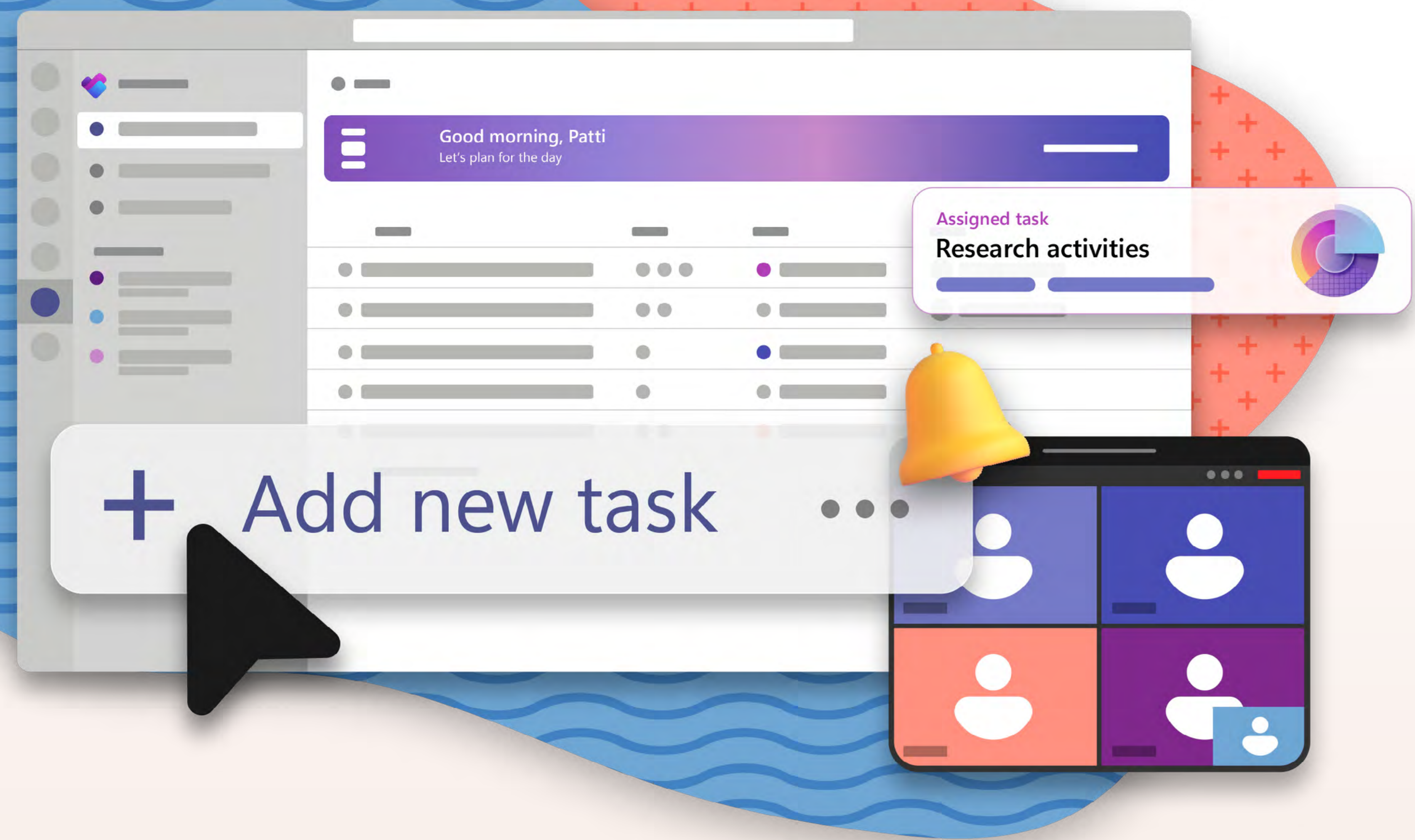
# Managing projects for your team

Meet Patti, a Marketing Manager who uses Microsoft Planner and Microsoft Copilot to help her hybrid team get organized and stay on task.

## 8:30 AM

Patti starts her day as the host of her division's weekly meeting on Microsoft Teams. She's excited to kick off a strategic market analysis.

During the meeting, the team suggests several research activities that Patti will lead. From the **My Day** view in Planner, she clicks **Add new task** to track and manage the research.

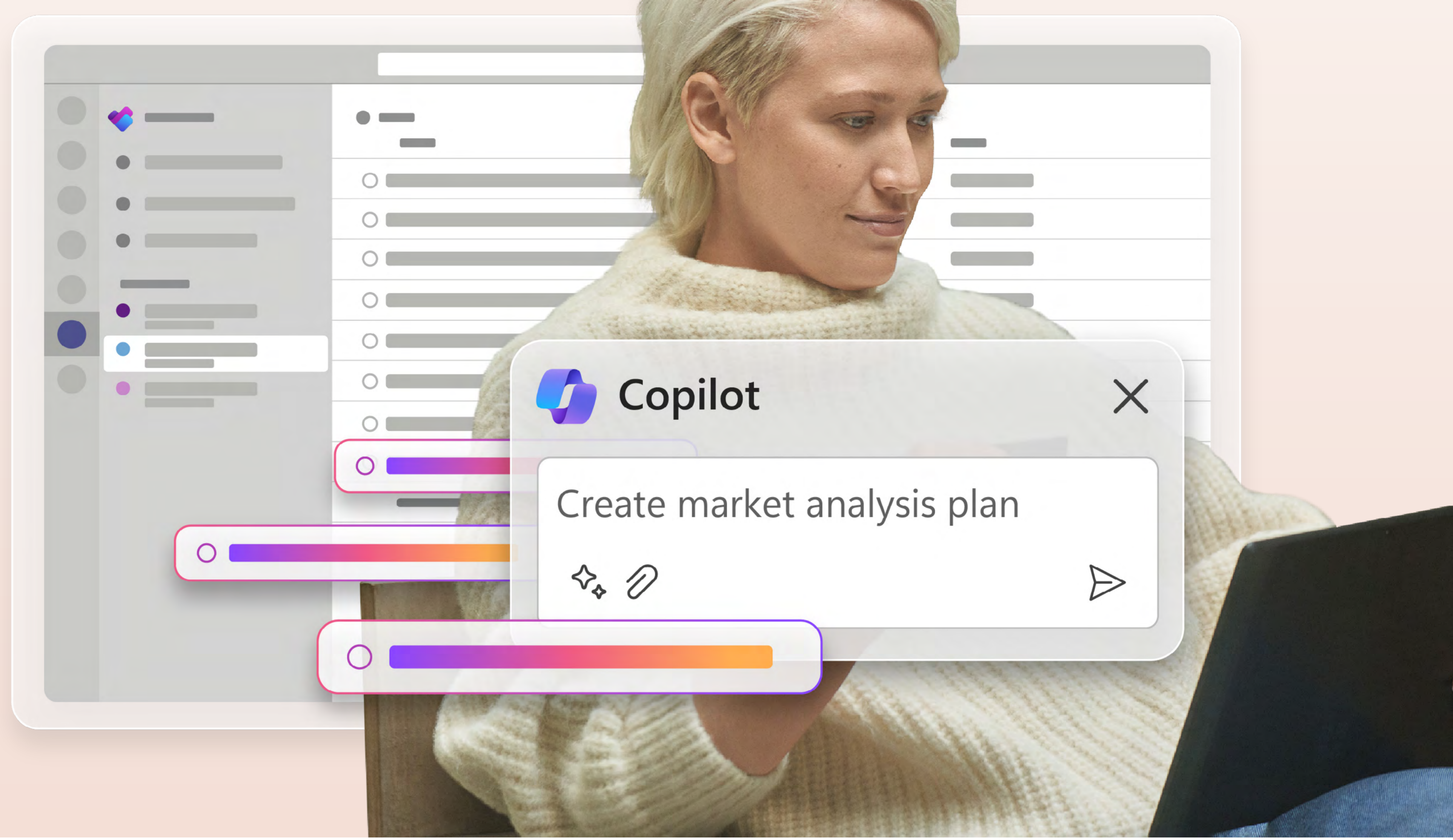


## 10:30 AM

It's time for Patti to create a plan to help her and her team complete the market analysis.

Rather than start from scratch, Patti asks **Copilot in Planner\*** to create a plan. She uses the plan, tasks, and goals that Copilot delivers as starting points.

With Copilot, Patti is always in control. She likes the plan Copilot has created, but she knows she can always tweak if she wants. Patti quickly adds the Copilot-generated **subtasks\*** and **task dependencies\*** to refine the plan.

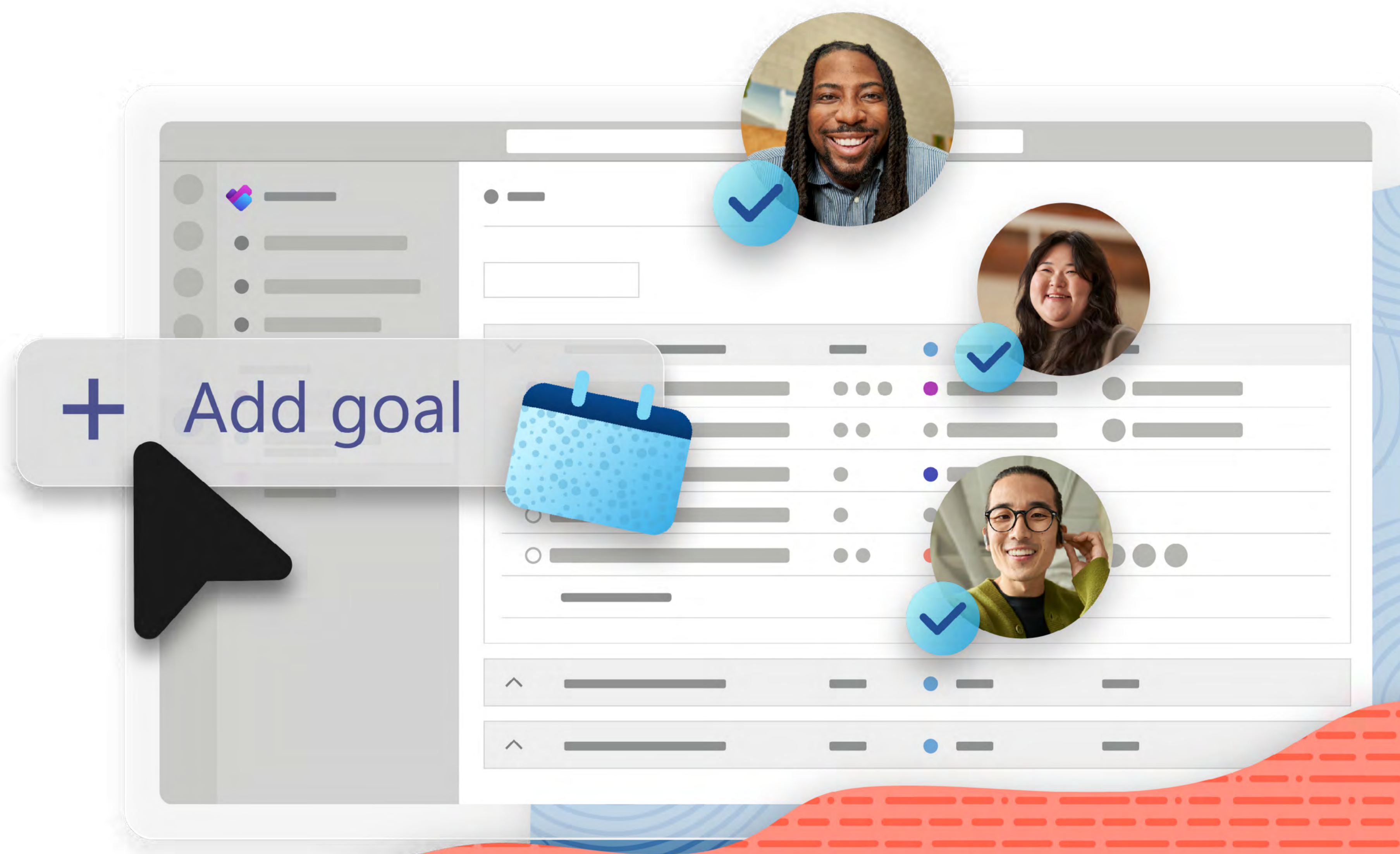


## 11:45 AM

Patti is ready to share her plan. She **invites project members** by selecting an existing **Microsoft 365 group** that already includes everyone on her project team. After sharing the plan, Patti assigns work across the team, so everyone can quickly get started on their tasks.

## 1:00 PM

Patti adds end dates to project goals using the **Goals view\*** in Planner.

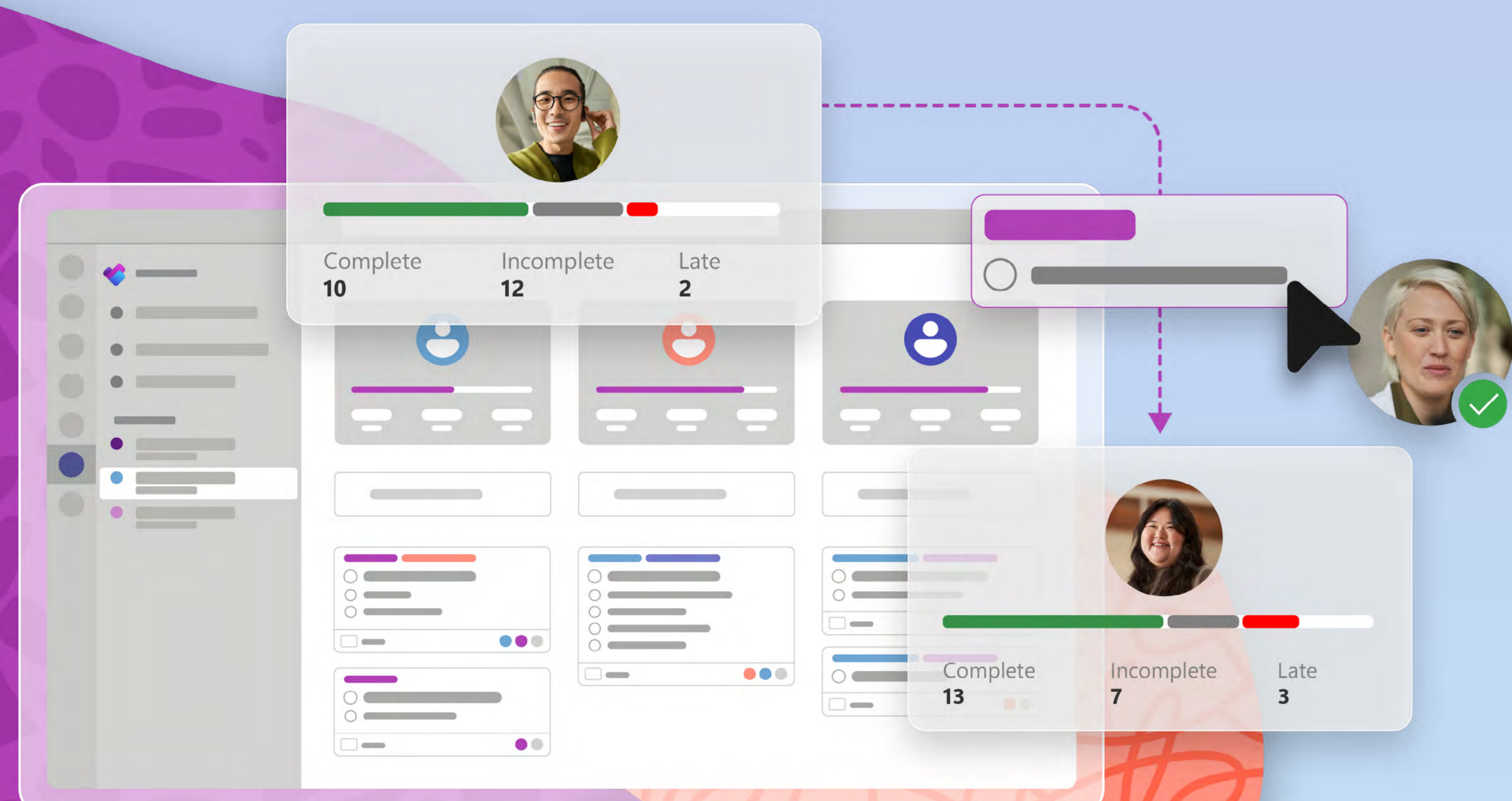


## 1:45 PM

Next, she adds the plan to a dedicated **Teams channel**, so it lives where the team already collaborates.

With **People view\***, each member's tasks and progress are visible channel wide. People view not only helps managers balance team workloads, but also it helps people determine whom to contact for questions or updates.

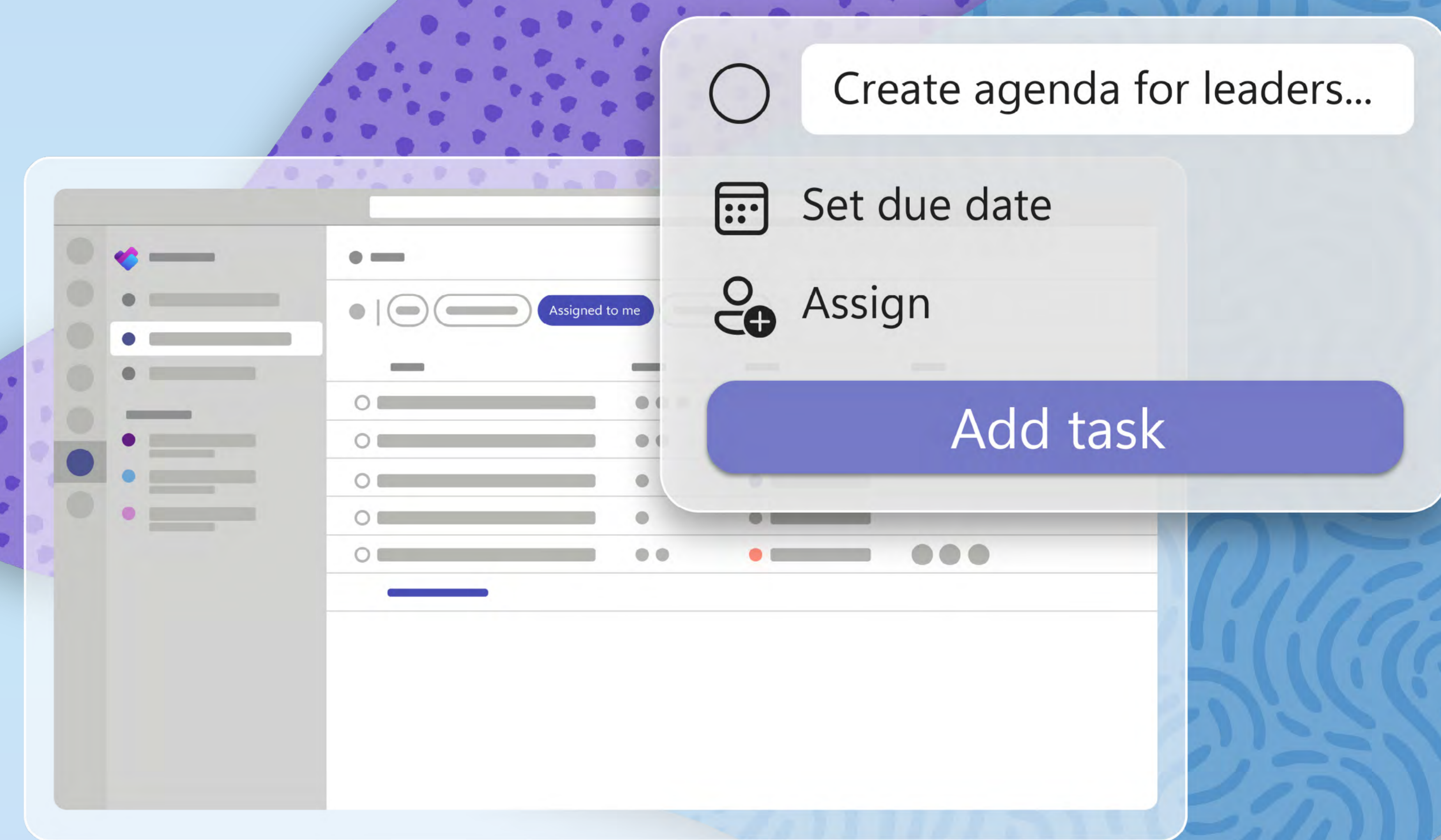
To track the status of her team's tasks, Patti clicks on **Task history**.



## 3:00 PM

Patti wants to review the market analysis plan with leadership. She still has a lot to accomplish today, so she uses Planner to prioritize. Patti clicks **My Day** and adds a task reminding her to create an agenda for her next leadership meeting.

For a full view of her workload, Patti clicks on **My Tasks** to see everything upcoming.



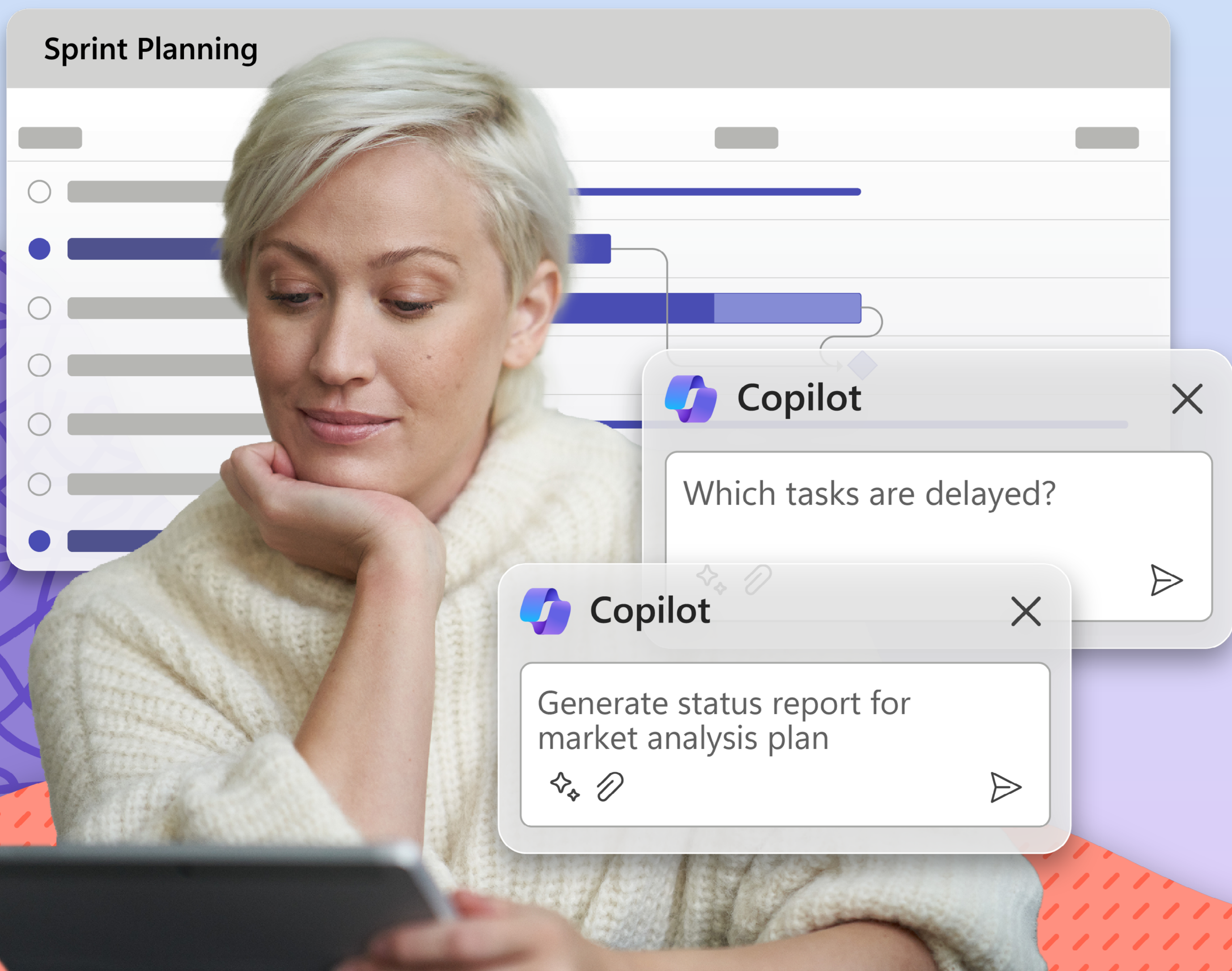
## 4:30 PM

Before attending her last meeting, Patti wants to confirm she has completed today's tasks. In **My Day**, she finds a pending task—she needs to send her leadership team a status report with her team's progress on an ongoing development sprint. She clicks on **Sprint Planning** within the **My Plans** view, using **Copilot\*** prompts to see overdue tasks and the plan's overall status.

## 5:15 PM

The Copilot-generated answers give Patti the information she needs to email an update.

With tasks assigned and relevant notes included, everyone knows what to do—no matter where or when they're working.



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