

# Task Management with Planner, To-Do, and Project

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**Vlad Catrinescu**

Microsoft MVP

@vladcatrinescu    <https://VladTalksTech.com>



# Overview



**Microsoft Planner**

**Microsoft To-Do**

**Microsoft Project**





# Microsoft Planner

Microsoft Planner is a Kanban solution that simplifies task management and to-do lists for teams and is connected across Microsoft 365 apps.



Create tasks & assign them to members of the team

Kanban style task management

Tasks are organized in buckets (lanes)

Add properties to each tasks

Tags

Due Date

Comments

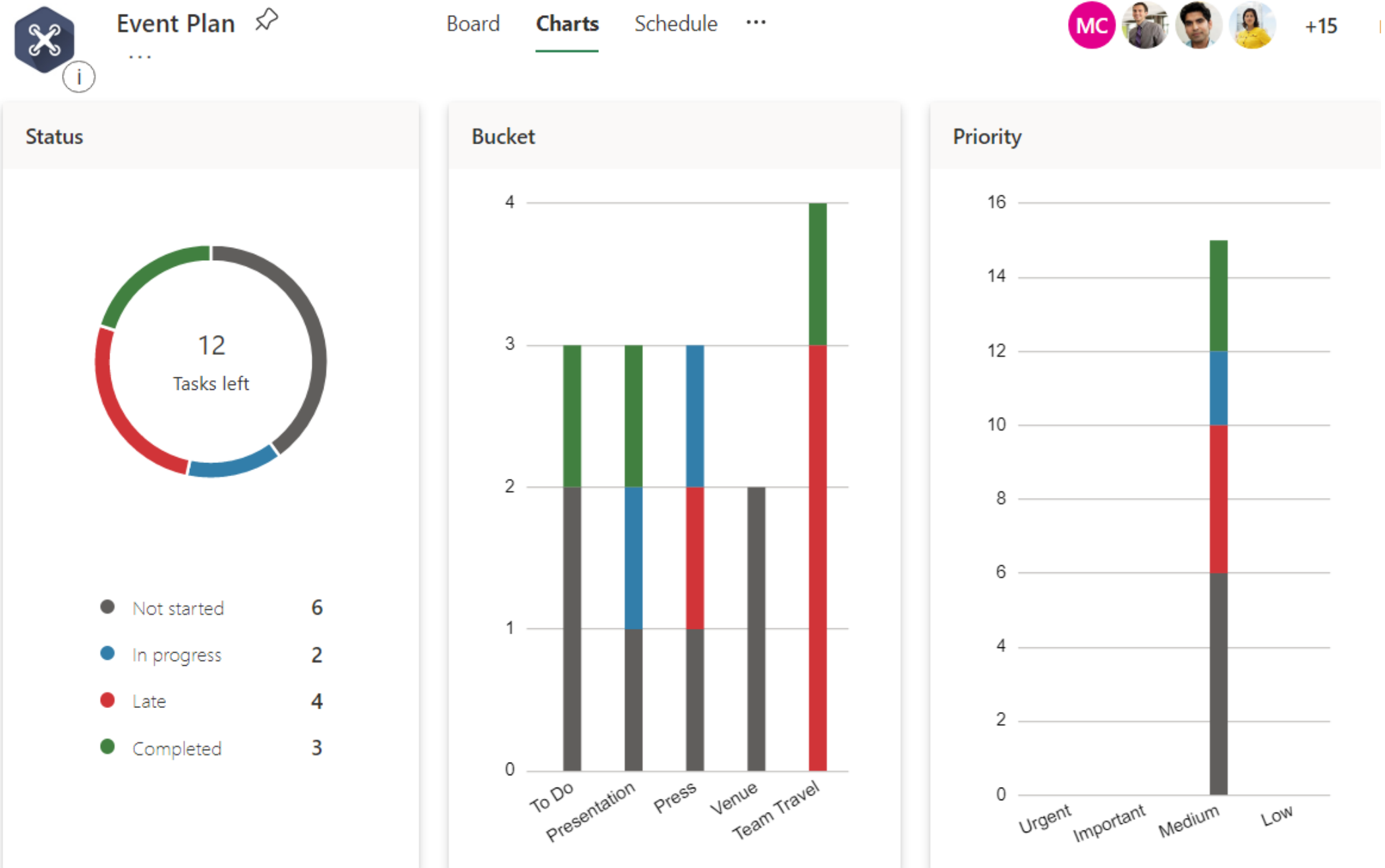
The screenshot displays a Kanban board titled "Event Plan" with a navigation bar including "Board", "Charts", and "Schedule". The board is organized into four vertical lanes, each with an "Add task" button at the top. The top right of the interface shows a team of 15 members and filters.

- To Do Lane:**
  - Task: "Submit your expenses" (tag: V-Team, due: 02/01, assignees: 4 members)
  - Task: "Schedule Dress Rehearsal" (tags: Fabrikam, Patti F, V-Team, due: 02/04, assignee: Alex Wilber)
- Presentation Lane:**
  - Task: "Main Deck review" (due: 01/28, 1 comment, assignees: 4 members)
  - Task: "Create example 3D samples for stage" (tags: Fabrikam, Patti F, Media / Press, due: 01/25, assignee: Grady Archie)
- Press Lane:**
  - Task: "OnSite Press Kit" (tag: Media / Press, due: 01/24, 1 comment, assignees: 2 members)
  - Task: "Schedule Post Event Press Interviews" (tags: Fabrikam, Patti F, Media / Press, due: 02/23, assignee: Adele Vance)
  - Task: "Web Media Kit" (tag: Media / Press, due: 02/28, assignees: 2 members)
- Venue Lane:**
  - Task: "Car Service for Patti F." (tag: Patti F, description: "Set up car service for Patti's entire stay locally.", due: 03/03, assignee: Adele Vance)
  - Task: "Book Valet Service for Event" (tags: Fabrikam, Media / Press, Vendors, due: 01/31, assignee: Adele Vance)

At the bottom of each lane, a "Completed tasks" section shows 1 completed task for each lane.



# Planner Analytics



Quickly view analytics about  
each plan

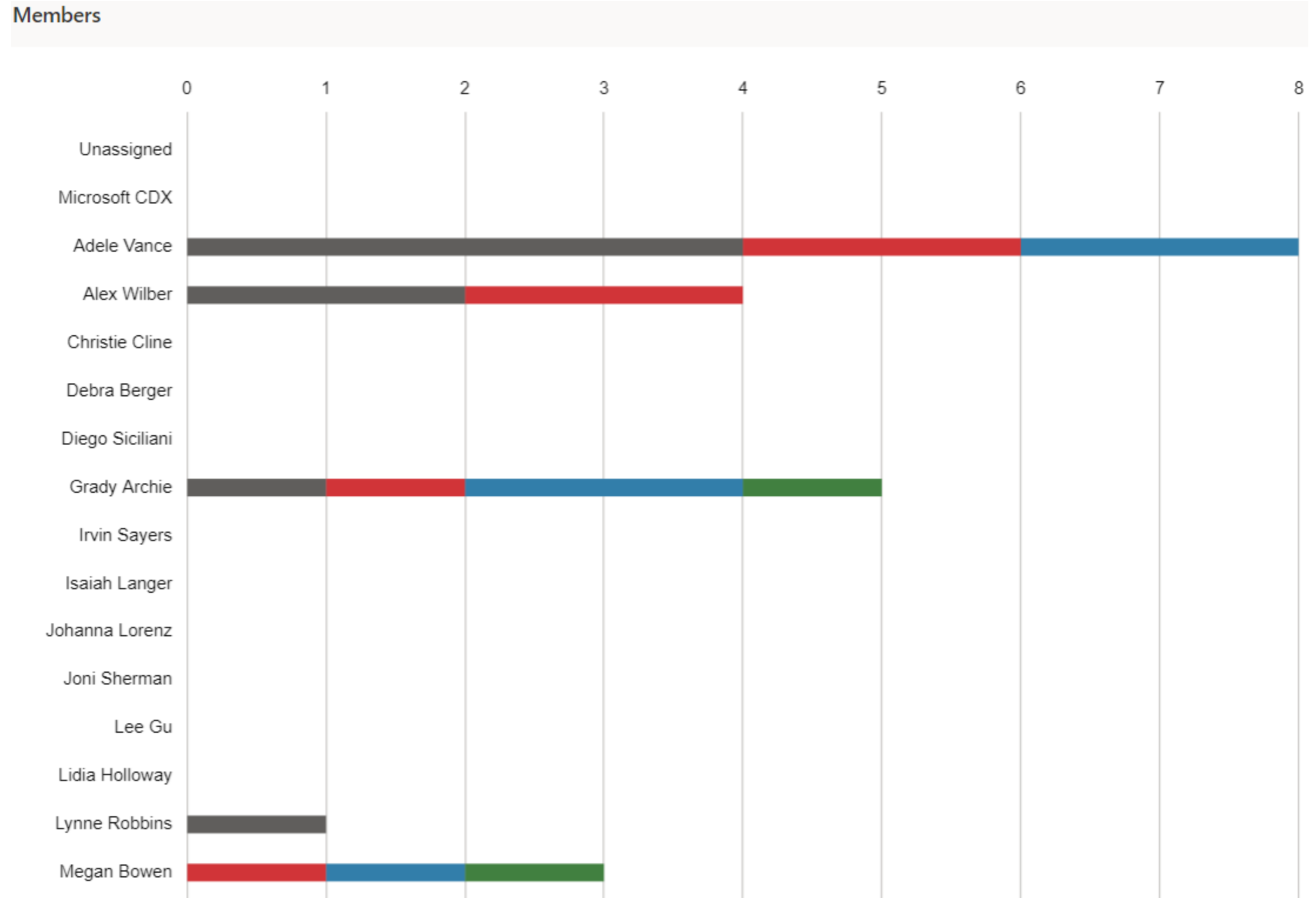
Status

Bucket



**View task assignments for each member**

**Reassign tasks if a member has too many**



# Demo



## Microsoft Planner in action





# Microsoft To-Do

Create to do lists, reminders, and notes for any purpose. Sync lists across devices and Microsoft 365 accounts to access daily planner and task manager features anywhere.





Personal task list in  
Microsoft 365

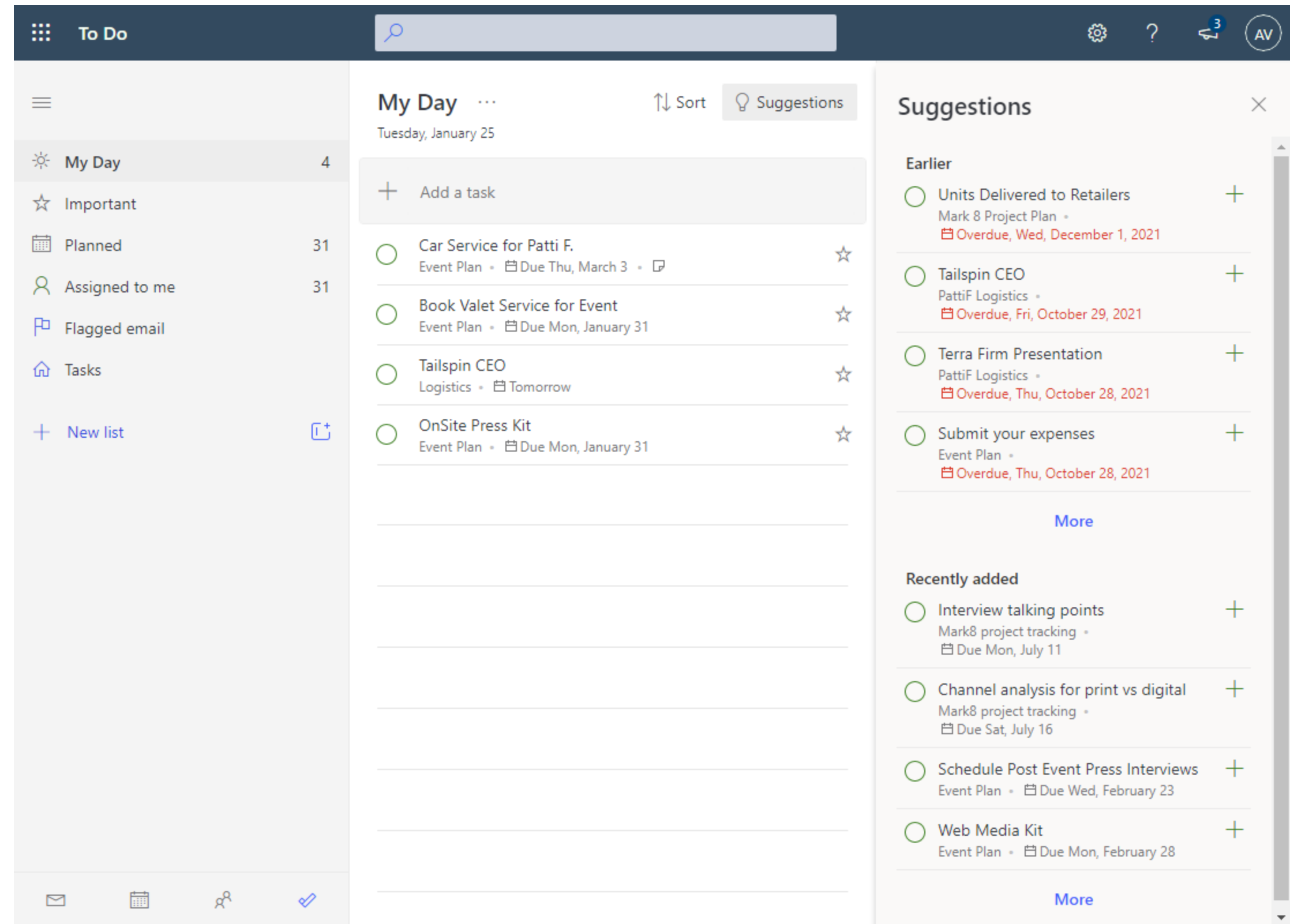
Create your own list(s)

Aggregates other tasks

Tasks assigned to you  
in Planner

Flagged e-mails from  
Outlook

Build “My Day” from all  
your tasks lists and stay  
focused



# Demo



## Microsoft To-Do in action





# Microsoft Project

Easily plan your projects with the power of dynamic scheduling based on effort needed, project duration, and allotted team members.



# Microsoft Project



**Complete project management tool**  
**Great for medium and large projects**



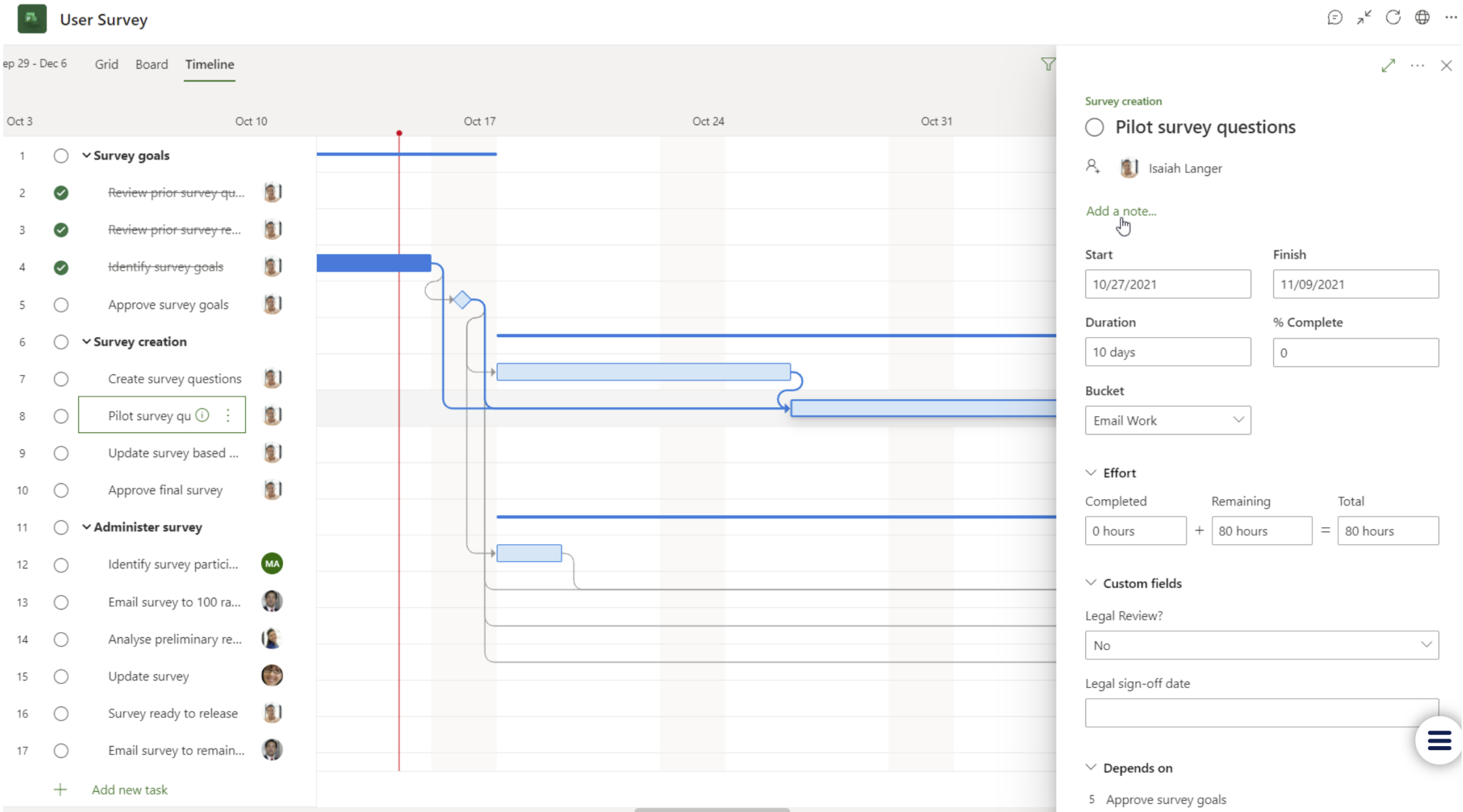
Timeline view (Gantt chart)

Sub-tasks / dependent tasks

Resource planning

Timesheets

Cross project reports



# Two Different Options in Microsoft 365

**Project for the web**

**Project Online &  
Project Online desktop client**



# Project Requires Additional Licenses

## Compare project management solutions and costs

Cloud-based solutions

On-premises solutions

Looking for more?

Project Online Essentials<sup>1</sup>

Try now with a partner

Project Plan 1

\$10.00<sub>user/month</sub>

Buy now

Try free for one month <sup>2</sup> >

Start quickly and manage projects easily via the web browser.

Project Plan 3

\$30.00<sub>user/month</sub>

Buy now

Try free for one month <sup>2</sup> >

Execute projects with ease with familiar scheduling tools through your choice of the web browser or desktop client.

Project Plan 5

\$55.00<sub>user/month</sub>

Buy now

Try now with a partner >

Optimize your project portfolio to prioritize initiatives and get the results you want through your choice of the web browser or desktop client.

Project Home

Starting in a centralized view, create new projects easily, quickly access important, top-of-mind projects, or open projects most recently worked on.



# When should I use Planner and when should I use Project for the web?

**Planner will remain the right starting point for individuals and teams collaborating on tasks. Project for the web offers the perfect “grow-up” tool for individuals and teams using Planner who find they need things like a grid view, dependencies, scheduling, and a timeline (Gantt) view.**

<https://support.microsoft.com/en-us/office/what-is-project-for-the-web-c19b2421-3c9d-4037-97c6-f66b6e1d2eb5?ui=en-us&rs=en-us&ad=us>





Find a full comparison  
between

Planner

Project for the web

Project Online

<https://support.microsoft.com/en-us/office/what-is-project-for-the-web-c19b2421-3c9d-4037-97c6-f66b6e1d2eb5?ui=en-us&rs=en-us&ad=us>

Feature	Planner	Project for the web	Project Online & Project Online desktop client
Task management	✓	✓	✓
Board view	✓	✓	✓
Teams and assignments	✓	✓	✓
Grid view		✓	✓
Timeline view (Gantt)		✓	✓
Dependencies		✓	✓
Scheduling		✓	✓
Roadmaps		✓	✓
Advanced PM (baselines, critical path, and so on)			✓
Resource management			✓
Financial management			✓
Program and portfolio management			✓



## Conclusion



### **Microsoft Planner**

- Kanban style task management
- Built-in analytics

### **Microsoft To-Do**

- Personal task list in Microsoft 365
- Create your own + aggregate from other sources

### **Microsoft Project**

- Complete project management tool
- Requires extra licensing



Up Next:

Collect Information with Microsoft Forms

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