



How to use Microsoft Planner as a dashboard to managing remote work

March 2020

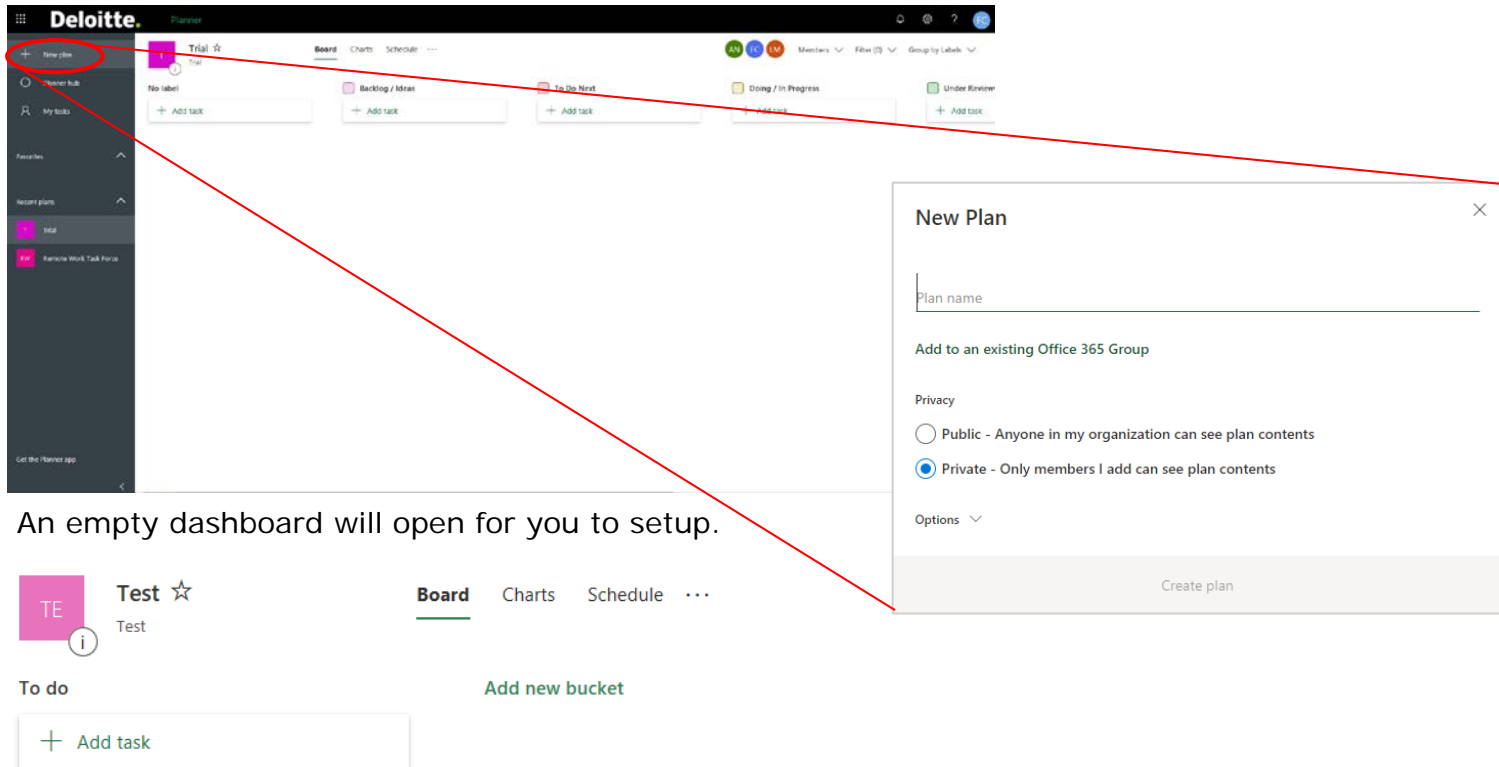
Tips and tricks based on our experience on how to use Planner to:

1. Setup a project dashboard
2. Define a structure of your plan
3. Invite your team members
4. Create your project overview
5. Working with your project dashboard on a daily basis

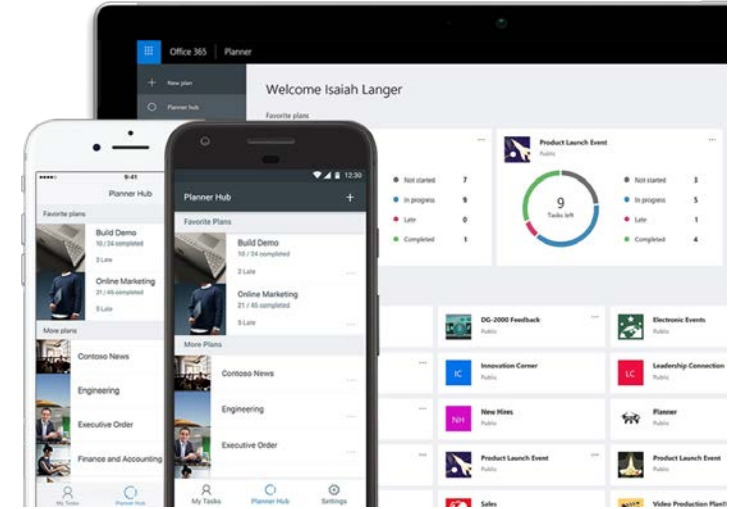
Please note: Microsoft Planner is a planning tool and shall not be used to collaborate on documents. No confidential information shall be shared on this tool. No external parties can be invited to this tool.

1. Set-up a project dashboard

- Go to <https://tasks.office.com/deloitte.onmicrosoft.com/> or download the Planner mobile app.
- Login with your Deloitte credentials.
- Click on New plan and define a name and privacy settings. We recommend to create a private board so that it is not visible for everyone but only by your team members.



An empty dashboard will open for you to setup.



2. Define a structure of your plan

Buckets



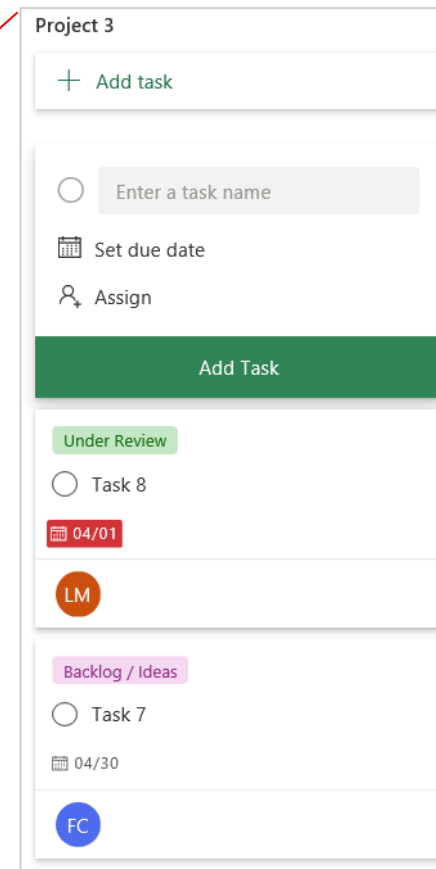
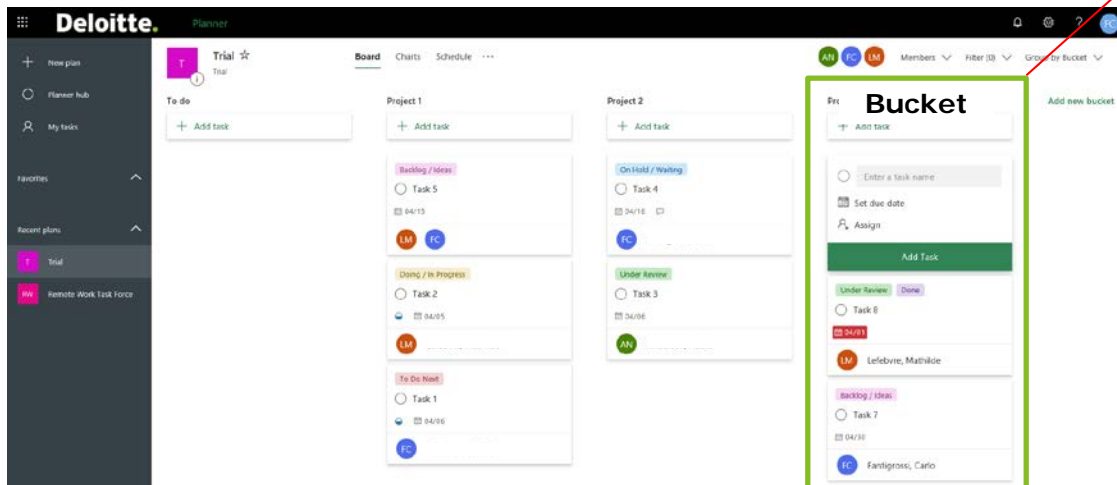
The standard view of the board is composed of different columns called **Buckets**.

If your team works on multiple projects, set up 1 bucket for each project. If your team works on only 1 project, use buckets to define work packages.

It's best to keep all the work in one plan and not spread it out over multiple plans. Using multiple plans will make it very hard to keep an overview during your weekly planning.

By default a bucket "to do" is created. Rename it.

Alternatively you can organize the buckets by: project phases, workflow, Kanban stages, business functions, topics.



2. Define a structure of your plan Task

Every bucket is composed of different **Task cards**.

Use those cards for deliverables and assign them to their owners (one or multiple members actively working on this deliverable).

You can add as many tasks as needed. You can organize your tasks as: deliverables, milestones, actions etc. Based on experience deliverables works best.

Break down larger deliverables into smaller ones, so that each deliverable (and hence card) can be assigned to a single person. In that case, you might want to consider setting up buckets for larger deliverables.

Add start and due dates if can. Based on dates (start and due date) email notifications are send to the assigned members raising for example awareness when a deadline is upcoming or late.

You can describe the goal / key result of the deliverable in the notes and clearly define what "Done" means.

If possible, break down the deliverable into steps in the checklist (e.g. research, define content, draft, review)

You can attach documents or links to the Sharepoint location of your documents.

In Progress you can define what is ongoing or completed. Once the Progress is put as "Completed", the task will be archived and no longer visible on the dashboard, which explains why we would not recommend this field to monitor progress.

The image displays the Deloitte Planner interface. The top part shows a Kanban board with three columns labeled 'Project 1', 'Project 2', and 'Project 3'. Each column contains several task cards with different status indicators (e.g., 'Not started', 'In progress', 'Done'). A red box highlights the 'Add Task' button in the bottom right of the board. Below this, a detailed view of a task card is shown. The task is titled 'Task 5' and is assigned to 'LM' and 'FC'. It is currently in the 'Not started' progress state with a 'Medium' priority. The start date is 'Start anytime' and the due date is '04/15/2020'. The task has a note: 'A couple of notes about what needs to be done and how to do it'. A checklist with three items is visible: 'Market Research' (checked), 'Build Presentation', and 'Partner Approval'. There is also an 'Add attachment' button and a 'Comments' section with a text input field and a 'Send' button. The bottom of the card shows the user 'Fantigrossi, Carlo' and the time 'April 3, 2020 12:03 PM'.

Definition of “Done”

It is important to establish with your respective team members what are the conditions or acceptance criteria, before a task can be considered as “done”. As a result of having a common definition, the risk of misunderstanding and conflict is limited.

Don’t hesitate to remind the team of your definition of “done” during regular meetings.



What could “done” be defined as:

- Clean deliverable reviewed and shared
- No outstanding issues
- All defined tasks completed, and outcome documented

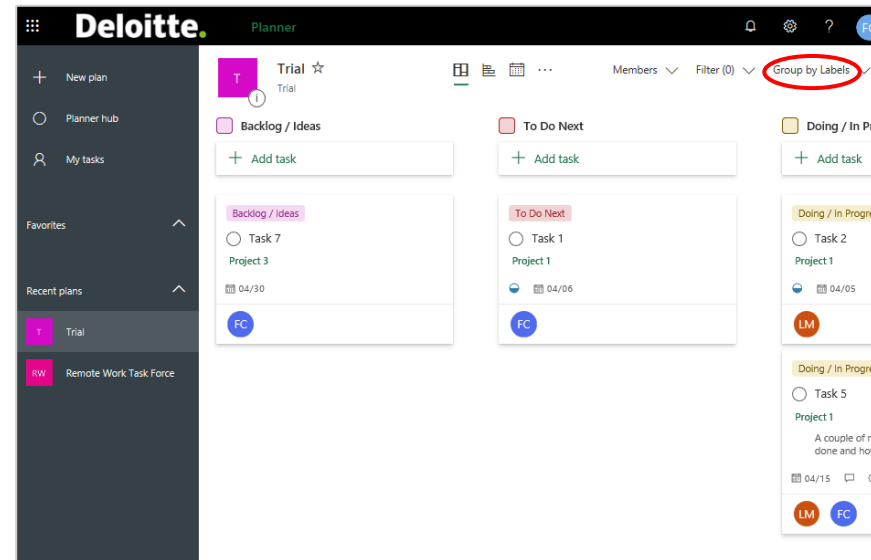
2. Define a structure of your plan Labels

We recommend to use **Labels** to detail the progress of the task respectively to indicate the state of the deliverable.

Up to 6 labels can be assigned to every task, and the labels can be different for each Dashboard.

Label suggestion:

- **Backlog / Ideas:** everything that still needs to be done.
- **To Do Next / Due This Week:** from the backlog select deliverables that need to be done next. During a Monday morning weekly planning session, you could indicate all the deliverables for the week with this label.
- **Doing / In Progress:** things the team / responsible person is currently working on.
- **Under Review:** things that need to be reviewed. Allows the team leader to have a quick view on what needs to be reviewed.
- **On Hold / Waiting For:** waiting for client feedback for example. Add a comment to the card using the comments function to indicate what's holding you or whom you are waiting for.
- **Done:** for completed tasks. we suggest you use the Done label during the week to see progress. To clean your board at the end of the week for next week's cycle, you can use the "Progress" drop down on the card to mark a deliverable done, so it will be hidden on your board.



- Group by: Labels
- Modify labels name

Assign a label
whenever creating
a task card

3. Invite your team members

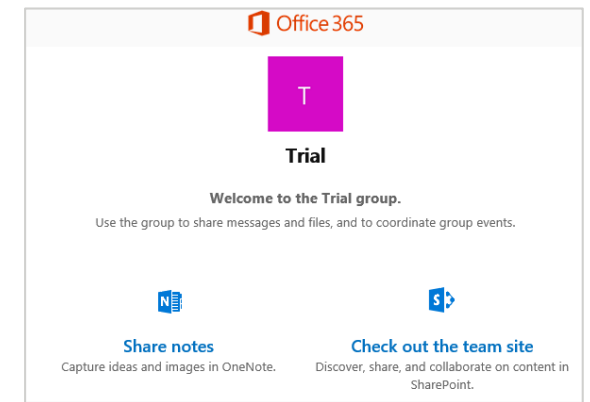
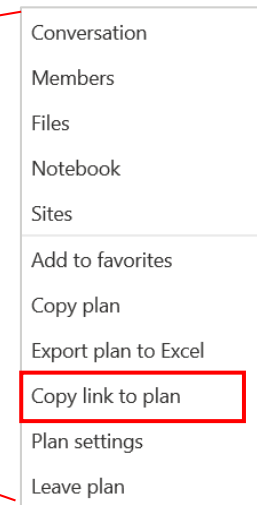
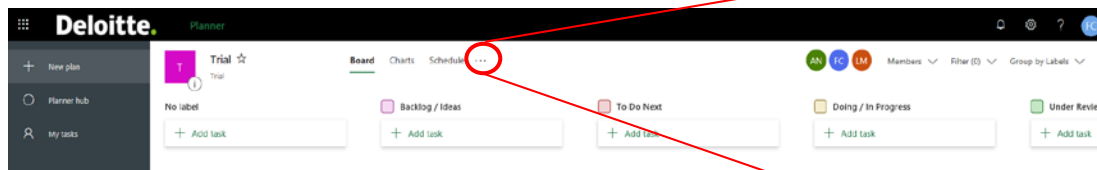
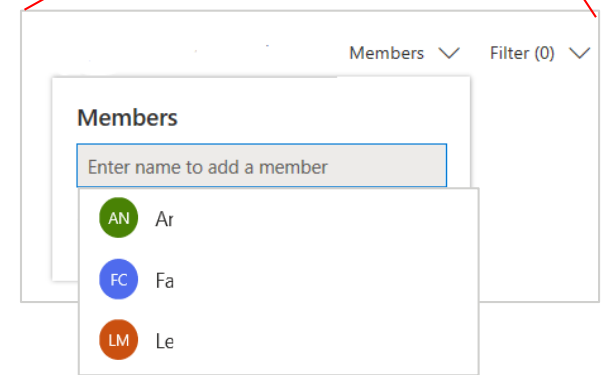
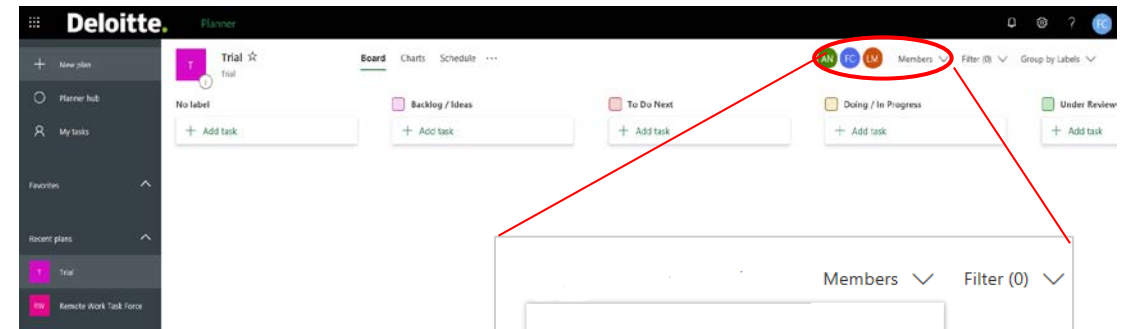
To add your team members simply click on **Members** in the menu on the top-right and search for their name or email.

Please note that only Deloitte Luxembourg employees can be added (no to be used with clients).

Only the owner of the dashboard can add new members or remove members. The team members can only see the different members.

The added team members will receive an automatic email from Microsoft Planner. Based on our experience the communication is not very clear and it is better to follow up with a personal communication sharing the link to the dashboard.

The link can be found on the option menu (the three dots "..." beside Board, Charts, Schedule on the top of the page), in the drop-down list under the voice "Copy link to plan".



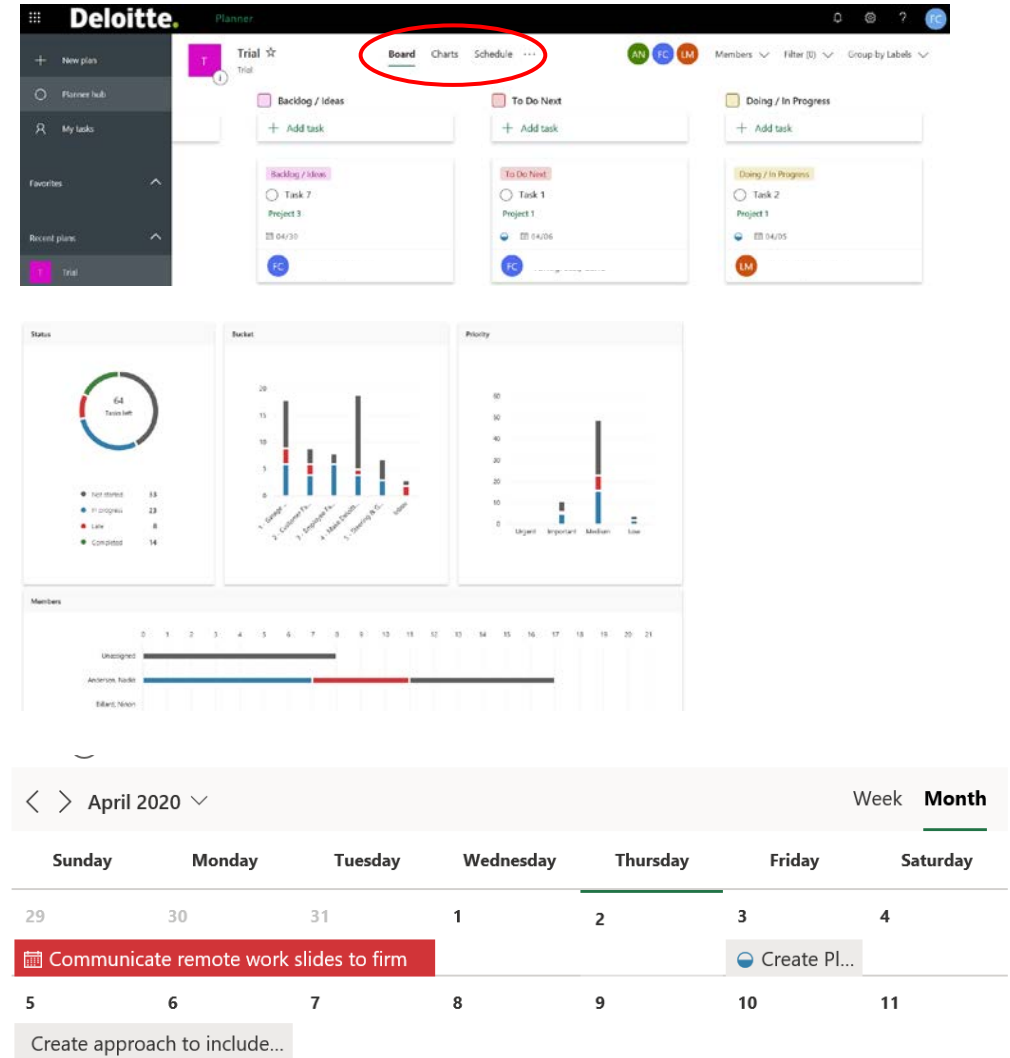
4. Create your project overview - Graphs

While the standard view is the "Board", Planner automatically creates dashboard overviews in "Charts" and "Schedule".

Charts provides different graphs which are updated live based on the task information:

- 1) A pie chart with the number of tasks in the different Progress phases
- 2) A histogram showing the tasks in their different progress phases categorized by buckets and by priority level
- 3) A bar diagram per team member showing the number of tasks and their progress phases

Schedule provides a calendar view (weekly or monthly) of the tasks in progress, using "dates" and "Progress" of the different tasks, highlighting the tasks that are late. Any unscheduled tasks (with no dates) are visible on the right hand side of this view.



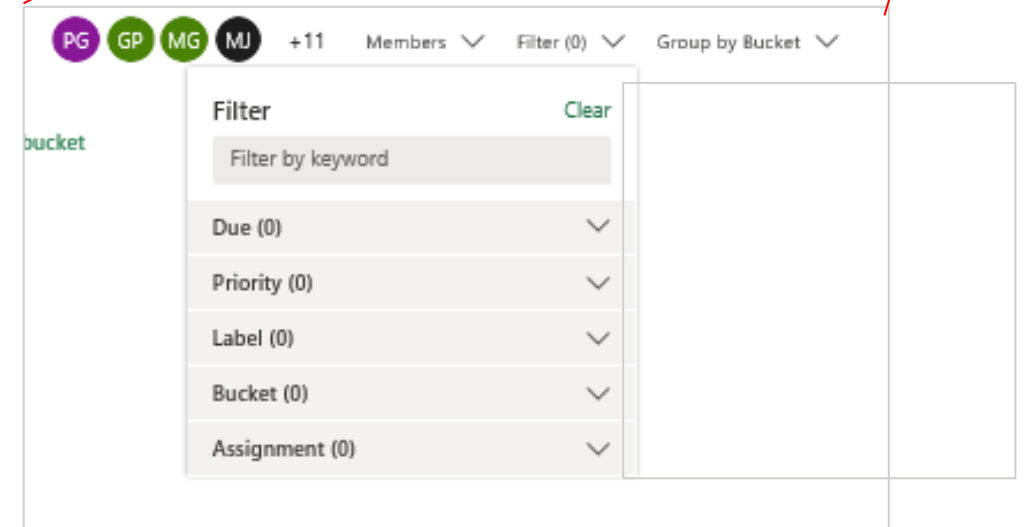
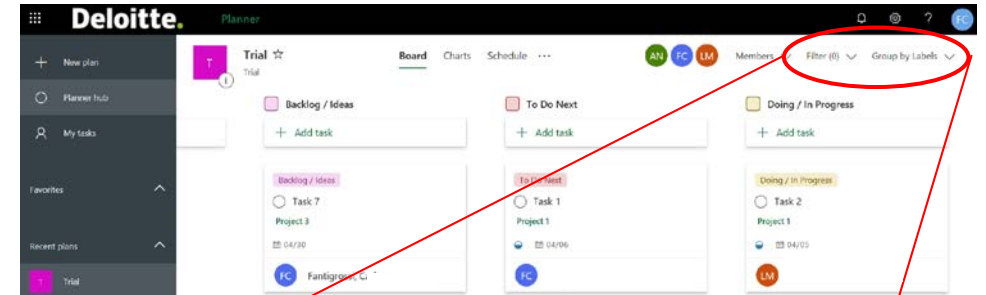
4. Create your project overview - Visualization

While the standard grouping is based on the “Buckets”, Planner allows multiple groupings and filters to create the view that is useful for you in a specific moment.

Group by provides alternatives to the bucket view. The columns of the dashboard can be changed to “assigned to”, “progress”, “due date”, “Labels”. While the assigned to can be an interesting view to see the tasks per team member, the most useful in our experience is the label view.

Filter allows to hide all non-relevant information and allow to concentrate on a specific topic. You can select one or multiple characteristics to be filtered on.

For example if you have the grouping on labels and add a filter on the priority you can see at where your urgent or important tasks currently are at.

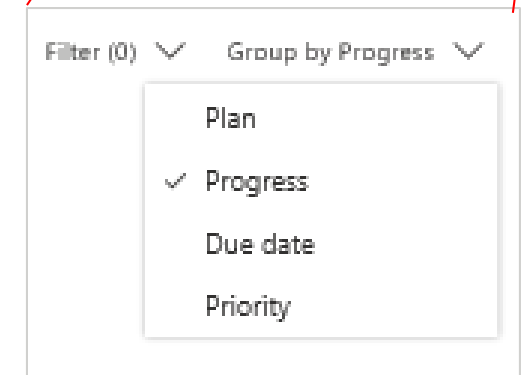
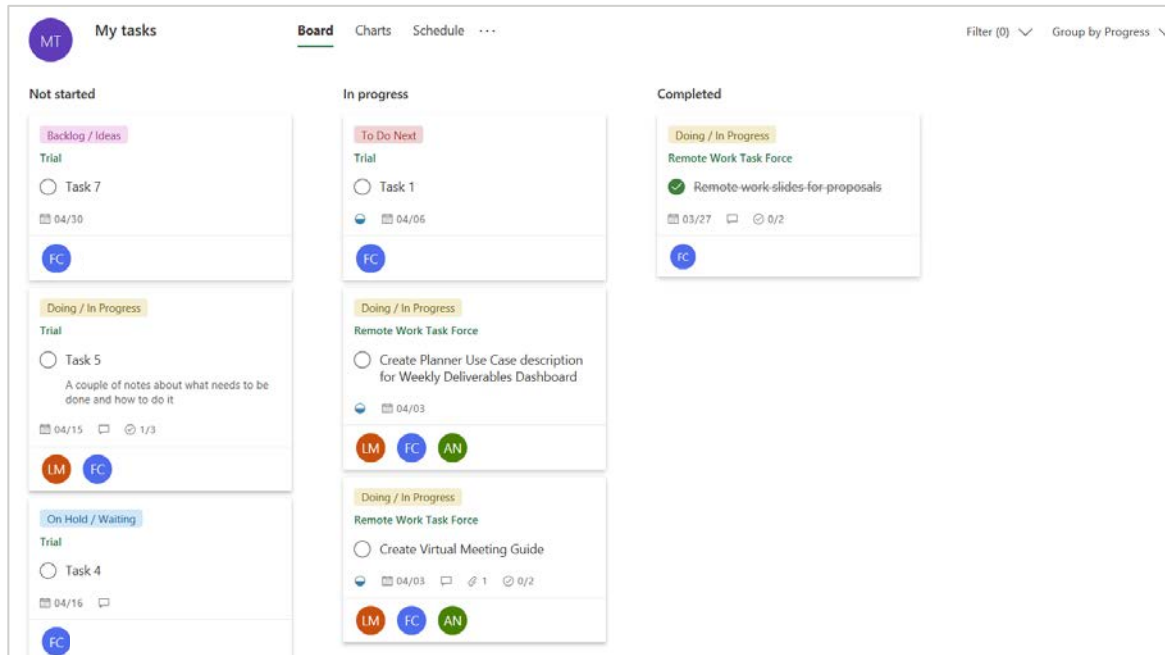
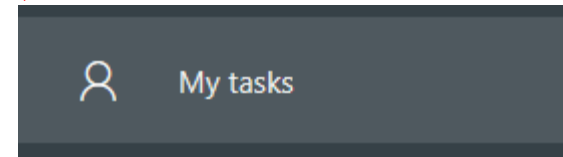
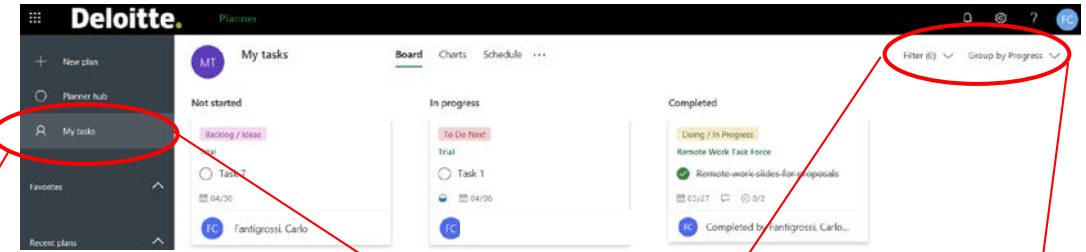


4. Create your project overview – Visualization for each team member



Lastly, every team member can use the **“My tasks”** view to see all tasks allocated to him. This view is across dashboards and allows the person to have an overview of the current progress of all deliverables owned by him.

Like this the team member can for example view his tasks based on priority and have a clear view of his priorities .



5. Working with your project dashboard on a daily basis

Planning next week

To prepare the Weekly Planning, it is important to review the deliverables that would be due next week to define next priorities and ensure the team workload is realistic.

You can use the Filter on the label "to do next" and potentially group them by "assigned to" to see the workload of the team members.

Weekly Planning

Ensure all deliverables for the week are understood, allocated to the team and aligned with the client.

Daily Check-ins

Define the objectives and deliverables of the day and identify any blockers.

The team members can write comments to document a status update. An email notification is sent to the owner for additional awareness.

Documents can be added to the tasks either directly or via a link to a SharePoint location.

You can use the Progress field to mark every task that is ongoing as well as the labels to highlight the current status (doing, under review). Any roadblocks can be marked with the label "on hold / waiting to".

Day-Closing

Provide a chance to get the team together and discuss urgencies or questions that came up during the day.

Review of the week

Discuss achievements of the week and lessons learned.

To clean your board at the end of the week for next week's cycle, you can use the "Progress" drop down on the card to mark a deliverable done, so it will be hidden on your board going forward.

Appendix

How to manage a
project and
project team
remotely



Client communication during remote working

Communication and team management in remote teams

How to plan and deliver a project remotely

Client communication during remote working



How to communicate with clients


Create **trust** in showing that we are **achieving agreed-on goals**, so the client can feel **comfortable** with us not working **on-site**.

...this requires a strong focus on **two factors**:

Transparency

We let the client see **how** work is done!

- Define remote collaboration guidelines together with the client
- Shared notes to provide meeting minutes to the customer
- Save all deliverables (also drafts!) in a common SharePoint
- Transparent communication
- No top-down definition of common ways of working but instead discussion within the team
- Inform the client proactively about your work progress through weekly planning and daily stand-ups

 Be creative with your interactions and find alternatives

Communication

We let the client see **who** is doing the work!

- Communicate more often – with video!
- Plan regular jour-fixes & schedule daily stand-up meetings
- Make intense use of client-provided chat / teams' software
- Schedule (optional) virtual coffee-brakes for the whole team: Everybody brings their own coffee and discusses anything but work
- More long-term planning of customer calls – remember, you can't just catch the customer in-between doors for a quick chat!

 Keep contact periodically not to make clients feel orphaned

Communication and team management in remote teams



Communication and team management in remote teams

Non face-to-face communication can lead to misunderstandings. A few hints to avoid any difficulties in team communication

- **Build a team culture** - transparency, openness, trust, tolerance of failures, and altruism are the key words
- **Establish a new rhythm** – create new traditions with virtual team-get-togethers, encourage people to be creative
- **Avoid conflicts** – watch your tone of emails and chat messages, ask questions for understanding and try to be as clear as possible
- **Personal experiences** – do not only talk about professional aspects and encourage informal moments in the team (coffee breaks for 15-20' using Skype, virtual lunches using FaceTime or Skype, virtual evenings etc) it is important to mimic in-office interactions and create virtual social intimacy
- **Camera** – the use of video provides a humanized and personal communication

Leaders:

- Make sure that next steps are clear for all team members and all team members feel like they know what's going on
- Remain available and give team members time to ask clarifications
- Offer encouragement and emotional support, listen to employees' anxieties and concerns
- Reassure and encourage
- Promote self-leadership across the team (hence being more self-sufficient and able to overcome obstacles)
- Be flexible and understand the needed flexibility of the team and client

Remote coaching and feedback :

- Make it a conversation
- Use your webcam
- Make it frequent and consistent
- Do it formally and informally
- Assume positive intent

How to plan and deliver a project remotely



How to plan a project remotely

Preparation and planning is essential. These tips and tricks might help you before the project kicks-off

- **Set clearly defined goals** - the standard Who, What, How need to be measurable. Goals should be broken down to weekly or daily deliverables for flexibility and tracking
- **Team involvement** - To understand stakeholders, you can use tools like Empathy Maps that can be produced collaboratively. Ensure to involve the team during task prioritization, planning of the week and align on how to work together
- **Team purpose** - both on an overall team level and a project level, clear purpose as well as understood by and committed to by all team members
- **Back to the basics** - use team meeting to explain tasks, roles and goals of each team member. This ensures not only transparency but also encourages collaboration and helps team members to turn to each other more rather than to the team lead
- **Roles** - also accept frequent changes. Pay attention that in a virtual setup, some roles may be useless, and some might be missing

How to communicate during a project remotely

Organizing virtual team and/or client meetings is no magic.

- **What is the purpose** – identify the purpose of the meeting. Is it an informal catch-up? Is it a regular team meeting? Is it a project update to the client?
- **Number of participants** – we recommend 10 to 15, more people could increase creativity but also increases complexity of facilitation and technology
- **Schedule** – consider schedules and time zones before sending an invitation (don't make one participant work into the weekend/holiday due to his location)
- **Duration** – keep meetings short (recommend 25-30 minutes, maximum 1 hour) and do more meetings if necessary
- **Webcam** – using video makes interactions less impersonal, helps maintaining human contact with teammates and avoiding the generation of "emotional misunderstandings"

The essential point is to maintain regular contact with the team and client...more is better than less.

Start the meeting:

- Present yourself and everyone on the call
- Define the rules of engagement and ask all participants to be present and ask every non-speaker to mute to reduce background noise
- Introduce the tool and provide time to practice (never assume people are familiar with it)

During the meeting:

- Be very specific when explaining and define what must be done together and what can be done individually
- Ensure all voices are heard and nobody feels left out (speaking order or call on people can be very helpful)
- Give participants a moment longer for input, give them time to share ideas and battle the mute button
- Create a visual so that everyone can see the bigger picture

How to communicate during a project remotely

Regular meetings ensure communication & transparency

Planning next week

Define next priorities and ensure the team workload is realistic.



Weekly Planning

Ensure all deliverables for the week are understood, allocated to the team and aligned with the client.



Daily Check-ins

Define the objectives and deliverables of the day and identify any blockers.



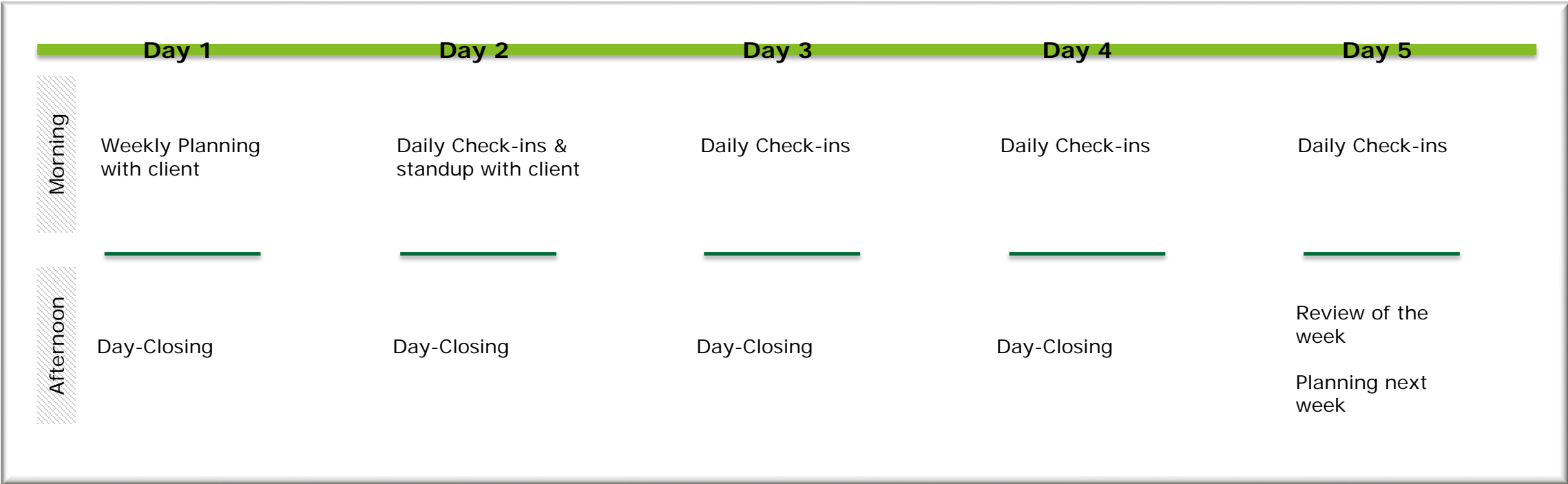
Day-Closing

Provide a chance to get the team together and discuss urgencies or questions that came up during the day.



Review of the week

Discuss achievements of the week and lessons learned.



How to communicate during a project remotely

How technology can help with regular project meetings

If you want to have an informal **chat** with your **team members** or catch-up with your **client**...



use of camera makes the meeting more friendly

If you want to have a **team meeting** with or without your **client** in order to follow up on **progress** made...



use of camera makes the meeting less impersonal and people can share their screen

If you want to have a **regular meeting** (weekly planning, check-ins, review of the week, ...) or brainstorming collectively...



use of interactive whiteboard offers you a lot of functionalities

How to manage a project remotely

Ongoing project management is key

Virtual dashboard: - Set up a visual virtual dashboard to track project progress

- To allow a continuous and shared overview of the progress (we recommend Microsoft Planner, but a whiteboard or excel available on SharePoint work too)
- Prioritization of existing and new tasks, visible for all team members
- Set goals both short and long term by having a backlog of which the team members can draw tasks
- Proactive and continuous updates. This requires discipline and consistent use of technologies but can be included in the project team culture
- Acknowledge the risk for change in performance (some people may be ok or some not)
- Division of the project into clear deliverables
- Transparency regarding tasks, timelines, and deadlines
- It is important to establish with your respective team members what are the conditions or acceptance criteria, before a task can be considered as "done"

Agile: - Learn from agile practices in how to organize your team's activities:

- Schedule regular meetings for transparency, support and communication as well as touch points with management, partners and the client
- Divides a project into a series of short timeframes (recommended: 1 week) ending with a specific deliverable to be completed ("DONE"). This allows to focus team and client attention on important topics at a time, ensures regular follow-up and possibility to raise and resolve blockers to guarantee finalization.
- Allow flexibility and rearranging tasks within a timeframe or increasing the team to get the deliverable finished. Share your agile plan with client and regularly update them.
- Adaptive capacity: monitor and re-adjust. Expect to be required to do a series of pivots and collaborate with teams and departments. If a pivot has to be done, start with a solid base and move from there.