

Kanban in 3 Minutes: A Practical Guide to Microsoft Planner

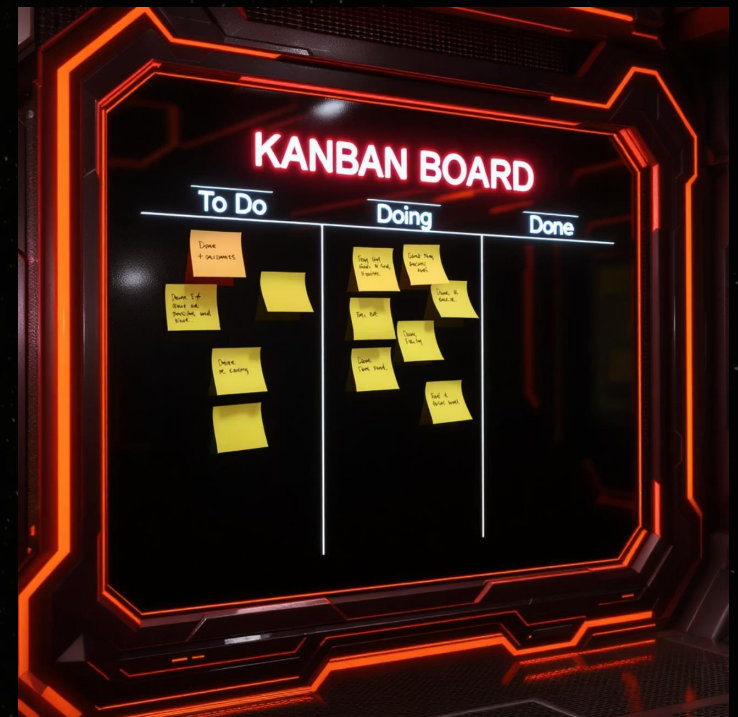
A quick primer on Kanban principles and how to effectively implement them using Microsoft Planner in your Microsoft 365 environment.



What is Kanban?

Kanban is a visual workflow management method that helps teams visualize their work, limit work in progress, and maximize efficiency. Originally developed in manufacturing, it has become a powerful tool for knowledge work.

The word "Kanban" comes from Japanese, roughly translating to "visual signal" or "card." A Kanban system uses cards moving across a board to represent work items flowing through your process.



The Six Core Practices of Kanban

Visualize Workflow

Make work visible on a board with columns representing different stages. This creates transparency and shows bottlenecks.

Limit WIP

Cap the number of items in progress to prevent multitasking and overload, increasing focus and throughput.

Manage Flow

Monitor and optimize the movement of work to make delivery more predictable and efficient.

Make Policies Explicit

Clearly define how work moves through each stage with transparent rules everyone understands.

Implement Feedback Loops

Regular reviews and metrics help teams continuously improve their process.

Improve Collaboratively

Use shared understanding and metrics to evolve through experimentation and data-driven changes.

Source: Kanban University

Why Teams Choose Kanban



Visualize All Work

See the entire workflow at a glance, creating transparency about who's working on what and where bottlenecks are forming.



Reduce Overload

Set WIP limits to prevent multitasking and burnout. Focus on finishing tasks rather than just starting new ones.



Improve Predictability

By managing flow and collecting metrics, teams can make more reliable delivery predictions and steadily improve performance.

The true power of Kanban comes not just from visualization, but from the discipline of finishing work before starting new tasks.

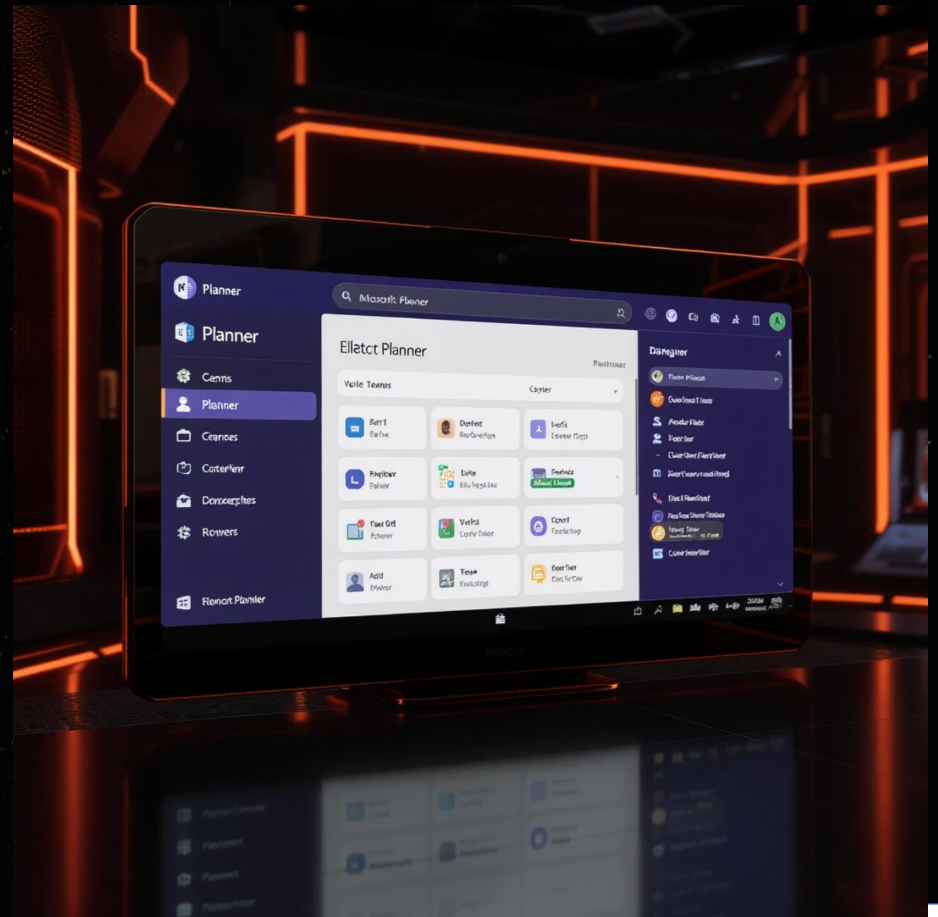
Microsoft Planner: Location & Access

As of April 2024, Microsoft has renamed "Tasks by Planner and To Do" app in Teams to simply "Planner," streamlining the experience across Microsoft 365.

You can access Planner through:

- Microsoft Teams (as an app or channel tab)
- Office.com or portal.office.com
- Direct URL: tasks.office.com

Pro Tip: Add Planner as a tab in your team channels to keep work and conversation in the same place.



Four Core Views in Microsoft Planner

1

Board View (Kanban)

The classic Kanban experience with customizable columns ("Buckets") representing workflow stages. Drag cards as work moves through your process.

Key feature: Add/rename buckets to match your workflow; if options are missing, ensure "Group by" is set to "Buckets".

2

Schedule View (Calendar)

Week/Month views for deadline management. Drag tasks to reschedule, and easily move unscheduled items onto your calendar.

Key feature: The "Unscheduled tasks" list makes it easy to plan your week by dragging tasks into place.

3

Charts View (Dashboard)

Visual analytics showing task status (Not started/In progress/Late/Completed) by Bucket, Priority, and team members.

Key feature: Quick filtering to focus on problem areas during status meetings.

4

Grid View (List)

Spreadsheet-style interface for rapid task editing, bulk updates, and triage sessions.

Key feature: Sort and filter to quickly find and update multiple tasks at once.

All four views are included in all Microsoft 365 plans. Premium plans add Timeline/Gantt, People, Goals, and Dependencies views.

Essential Building Blocks for Effective Plans

Task Components

- **Assignees:** Multiple users can be assigned to a single task
- **Dates:** Both start and due dates for accurate scheduling
- **Priority:** Urgent, Important, Medium, or Low
- **Description:** Rich text support for detailed information
- **Checklists:** Create subtasks with completion tracking
- **Attachments:** Files, links, and references
- **Comments:** Threaded conversations about the task

Organization & Navigation

- **Labels:** Up to 25 color-coded tags per plan; customize names to fit your taxonomy
- **Group By:** Instantly reorganize by Bucket, Assignee, Progress, Due date, Labels, or Priority
- **Filter:** Focus discussions by showing only relevant tasks based on any attribute



Integration & Reporting Capabilities



Teams Integration

Add Planner as a tab in any Teams channel to keep work and conversations together. All changes sync automatically.




Notifications

Users receive email and Teams alerts for assignments and approaching deadlines. Individual notification preferences can be managed in Settings.



Excel Export

One-click export (... → Export plan to Excel) for advanced analysis, custom reporting, or combining data from multiple plans.

 **Premium Features:** While the core views (Grid, Board, Schedule, Charts) are included in all Microsoft 365 plans, some advanced capabilities require appropriate premium licensing:

- Timeline/Gantt view for dependency mapping
- People view for resource allocation
- Goals for strategic alignment
- Task dependencies for complex workflows

Key Takeaways

- Kanban is about workflow visibility, limiting WIP, and improving flow—not just moving cards
- Microsoft Planner provides a full Kanban implementation inside your Microsoft 365 environment
- Four core views (Board, Schedule, Charts, Grid) provide flexibility for different planning needs
- Teams integration keeps work and conversations in one place for better collaboration

Start small, evolve gradually, and focus on finishing work—not just starting it.

