

# Mastering workflows

## Outlook, Teams and Planner



Make the most of your time with Microsoft tools that work seamlessly together. Outlook, Teams, and Planner help you manage tasks, stay organised, and collaborate more efficiently.



### Tool overview

#### Outlook

- Flag emails to create follow-up tasks.
- Turn emails into actionable items.

#### Teams

- Your central hub for communication and collaboration.
- Use channels to manage team-specific work.
- Add Planner tabs to keep track of shared tasks.

#### Planner

- Assign tasks with due dates and details.
- Organise tasks into buckets or progress categories.
- Monitor updates and task completion with ease.
- Planner is available directly inside Teams or as a separate web app.



- 📧 Flagging emails helps reduce inbox overload by highlighting important messages and keeping your tasks organised.
- 📌 Teams channels keep conversations and files in one place.
- 📅 Use task labels in Planner for colour-coded organisation.



🔄 Changes sync across all tools—no manual updates needed.

🔍 Use **My Tasks** in Planner to see everything assigned to you.

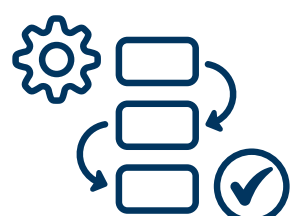
📁 Keep personal and team plans separate for clarity.



### Streamline your workflow

Follow a simple, connected path, i.e.:

- flag an email in Outlook
- track it in Planner
- collaborate in Teams



### Built-in workflow in Teams

- Get a notification when a Planner task is updated.
- Send an email when a message is posted in a Teams channel.
- Combine Outlook, Teams, and Planner in a customised flow.



- ⚙️ Workflows save time by reducing manual follow-up.
- 🔊 Notifications help teams respond faster.
- 🔗 Automations work across Outlook, Teams, and Planner.



📅 Use the calendar view in Planner to see your tasks laid out by week or month.

🔍 Use filters to narrow your view to what's most urgent or relevant.

🗑️ Archive completed tasks to keep your view clean.



### Extra tips to work smarter

- Pin frequently used plans for quick access.
- Filter tasks by due date, label, or status.
- Open Planner in a browser for a full-screen view.