Microsoft

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Microsoft Partner
Gold Project and Portfolio Management
Silver Collaboration and Content
Silver Business Intelligence

Let it Flow: Bring Automation Into Your Projects

Presented by: Scott Clausen

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Presenter: Scott Clausen, PMP, MCP, MBA

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Director of Delivery and Technology

Scott has over 16 years of experience with Microsoft PPM and offers a unique combination of business, project management, and technical expertise. Scott is an expert at envisioning and delivering solutions that utilize technologies across the Project Online, SharePoint and Business Intelligence platforms. Scott holds an MBA from UC Berkeley and is an active PMP and MCP with 20 exam certifications.
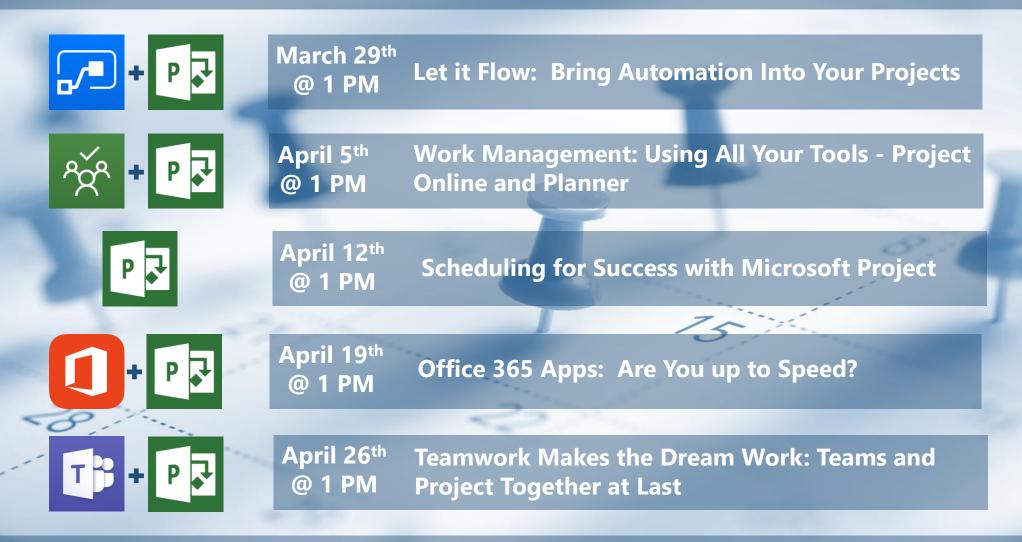
Project   SharePoint   Office 365   Power BI

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PPM Works Upcoming Webinars

March 29th @ 1 PM — **Let it Flow: Bring Automation Into Your Projects**

April 5th @ 1 PM — **Work Management: Using All Your Tools - Project Online and Planner**

April 12th @ 1 PM — **Scheduling for Success with Microsoft Project**

April 19th @ 1 PM — **Office 365 Apps: Are You up to Speed?**

April 26th @ 1 PM — **Teamwork Makes the Dream Work: Teams and Project Together at Last**

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Learning Objective

To walk away with a better understanding of:

- Microsoft Flow and the Project Online events and actions
- The next wave opportunities with leveraging Flow to automate your repetitive actions and project steps
- how, when, and why you would use Flow and Project Online

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Goal and Agenda

Goal: Review Project Online capabilities, needs and overview Microsoft PPM tool

Demo Agenda and Topics
Team Introductions
1. Confirmation of Challenges
   - Project Online Overview
   - Total Project Visibility/Document Collaboration/Workflow
   - Project Reporting (Project visibility, reports and dashboards)
   - Resource Management
2. Management Visibility and Resource Management
3. Next Steps, Q&A and Wrap Up

Next Steps Discussions

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Key Benefits of Microsoft PPM

- **Project Visibility:** See all projects in your organization
- **Reporting:** Increased reporting tools both Out of the Box and configurable tools (Dashboards and Power BI)
- **Governance and Workflow:** Create templated program schedules – Content, Research, Social
- **Collaboration:** Share with entire team – Teams
- **Program Visibility:** Rollup of milestones across projects
- **Usability/Seamless Adoption:** Integration with Office 365 – SharePoint Online, Outlook, Skype

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Project Online Benefits

1. **Performance Improvements Over Project Server**

2. **New Online Features:** Portfolio Management Dashboards, Resource Engagements, Multiple Timelines, Capacity Planning with visual heat maps, Managing Project via the web

3. **Online Features Coming Soon:** Agile Projects, Microsoft Planner and Project Integration, Power BI Dashboard (new in Fall 2017)

4. **Infrastructure Consolidation:** Save physical server cost - eliminate need for internal IT support/upgrade/maintenance

5. **Evergreen**: Always have the latest version – benefit from millions of users

6. **License Management**: Easy cloud licenses

7. **User Adoption/Scalability:** Scale – no size restrictions or performance concerns

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Q & A and PDU's for this Webinar

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