



**Microsoft's Complete Work Management Solution**  
**Presented by Laura Crawford**  
**September 28, 2017**

# Presenter



## **Senior PPM Specialist**

Laura has over 7 years of experience with Microsoft PPM and offers a unique combination of business, project management, and technical expertise. Laura is an expert at envisioning and delivering solutions that utilize technologies across the Project Online, SharePoint and Business Intelligence platforms. Laura holds an BS from State University of New York College at Oswego and is a Microsoft Certified Trainer and a Microsoft Specialist.

# Upcoming PPM Works Events

Event	Date
PMI® Mass Bay PDD 2017	September 22-23
Microsoft Ignite	September 25-29
PMI® Minnesota PDD 2017	September 25-28
<b>PPM Works Webinar:</b> Microsoft's Complete Work Management Solution	September 28 12 PM
Boston PPM Community Meeting	October 4 5:30-7:30 PM
<b>PPM Works Webinar:</b> The Scheduling Formula	October 12 12 PM
Project Summit Business Analyst World Boston	October 16-19
Dashboard in a Day Workshop	October 24 8-9:30 AM
KPI Reporting in Project Online	October 26 12 PM

Hope to see you there

# Why PPM Works

- **Gold Microsoft Certified Partner** exclusively focused on **Microsoft Project, SharePoint, and Office 365**
- Some recent **Experience** includes Allergan, Medtronic, Plantronics, Tesco, Synopsys and many more...



- We believe in **partnering** with you, **exceeding expectations** to build **long lasting success**.
- Our team's experience runs deep with Microsoft.
  - Over **225 Project Server implementations** and Trained **thousands** of students
  - Delivered **dozens** of Industry presentations (Microsoft Project Conference, Project Summit, PMI Conference)
  - Created **hundreds** of webcasts and blog articles
- We have contributed to the **new release of Microsoft Project and Project Server** for the past three cycles and share our expertise as volunteers for Microsoft, PMI, MPUG, and Project Summit.
- We **guarantee your success** and **our results** – we are not done until you are a satisfied client reference



# Why Clients Choose PPM Works

**Our Philosophy:** We believe in honesty, integrity, and dedication – our passion for success drives our team. PPM Works core values start with family and health first to provide the most for our clients.

- Quality of Services are unmatched
- Trusted Experience
- Listening comes 1<sup>st</sup>
- Proven Methodology and Templates
- Competitive Pricing



Thank you for the information share today! You are so knowledgeable and a gifted presenter/teacher.

Program Manager, UnitedHealth Group

I wish we would have found PPM Works a long time ago - you make Microsoft Project understandable for all

Large Boston-based Pharma Co, Director of Training

I've attended several industry webcasts, conference sessions, and vendor meeting – this week's MPUG webinar certificate series on Microsoft Project (Online, Server, and Professional) was by far the best and I found it very useful – thank you.

Sr. Project Manager Consultant, Large Legal Firm

# Agenda

**Introduction**

**What are you managing and how?**

**Microsoft's Planning and Team Productivity Tools**

**Roadmap to PPM Maturity**

**Office 365 Overview**

**What Tool to Choose & When**

**Use Case Scenarios**

**Question and Answer**

# Learning Objectives

At the end of this webinar, participants will understand the differences and use cases for Office 365 Productivity tools (highlighting Project Online, Planner, Teams, Yammer and Skype)

Participants will be able to:

1. Understand Task Management and Work Management
2. Understand Office 365 Productivity Tools (Teams, Yammer, Skype, Planner, and Project Online)
3. Determine when to use what tools

# Session Goals

**Increase Understanding  
of Microsoft Work  
Management Solutions**

Tips and Tricks for  
both New or Mature  
Organizations

**Equip You to Get  
Started Today**

Quick Reference on  
Steps to Get Started

**Make the Most of Your  
Time**

Fast-pace,  
Condensed Content  
with Time for  
Question and Answer

# What are you Managing?

**Task management** is the process of managing a task through its **life cycle**. Task management is performed by the individual assigned to the task and does not involve others but is still important to the company.

**Work management** is a set of software products and services that apply workflow structure to the **movement of information** as well as to the interaction of business processes and human worker processes that **generate the information**.

**Project management** is the **discipline** of initiating, planning, executing, controlling, and closing the work of a team to **achieve specific goals** and **meet specific success criteria**.

**Project Portfolio Management** (PPM) is the centralized **management** of the processes, methods, and technologies used by **project** managers and **project management** offices (PMOs) to analyze and collectively manage current or proposed **projects** based on numerous key characteristics.

# How You Work

## Me Work



Focusing on individual activities and tasks that do not involve others but are important to the company

## We Work



Working with my peers and other groups on ad-hoc projects, and longer term communities of interest

## Department Resources



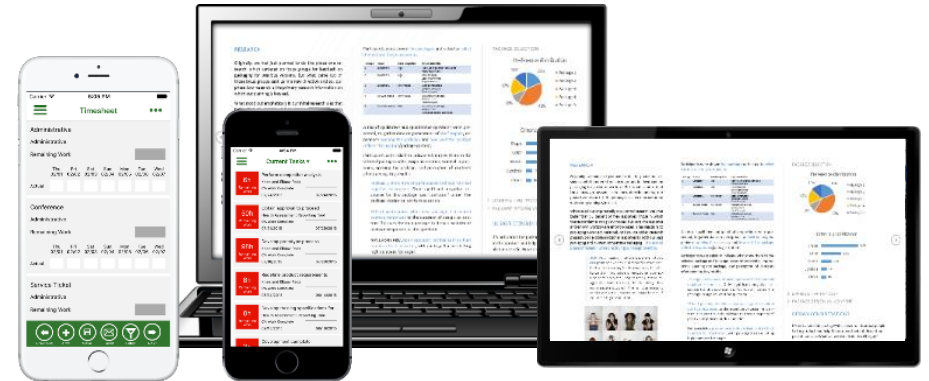
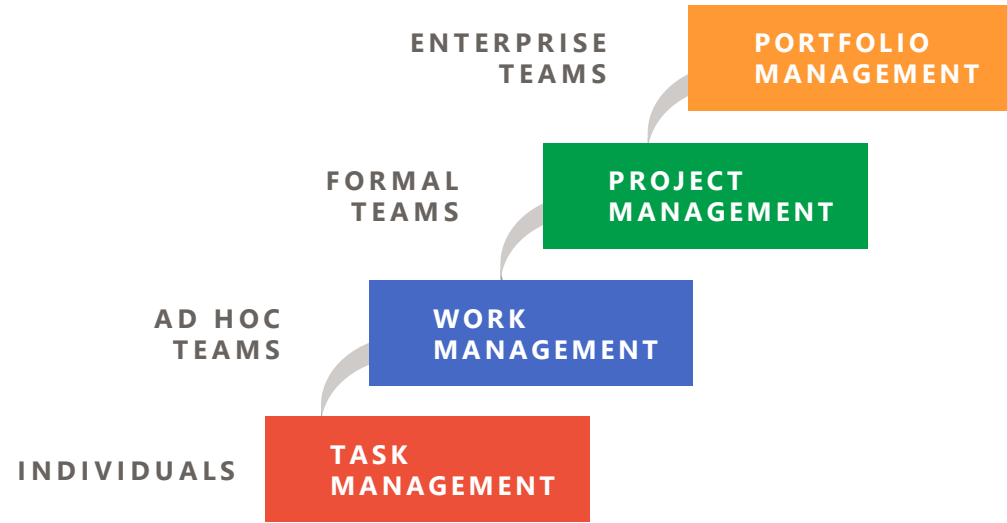
Structured resources for large groups of people that are focused on a common goal or area of the company

## Company Connection



Finding and consuming content that connects me to the whole company and success of the business.

# MICROSOFT'S PROJECT AND TEAM PRODUCTIVITY SOLUTIONS



Tools for all uses

Best experience across devices

Seamless  
Browser &  
Desktops

Calendars  
& Schedules

Content  
Management

Task  
Management

Enterprise  
Social &  
Messaging

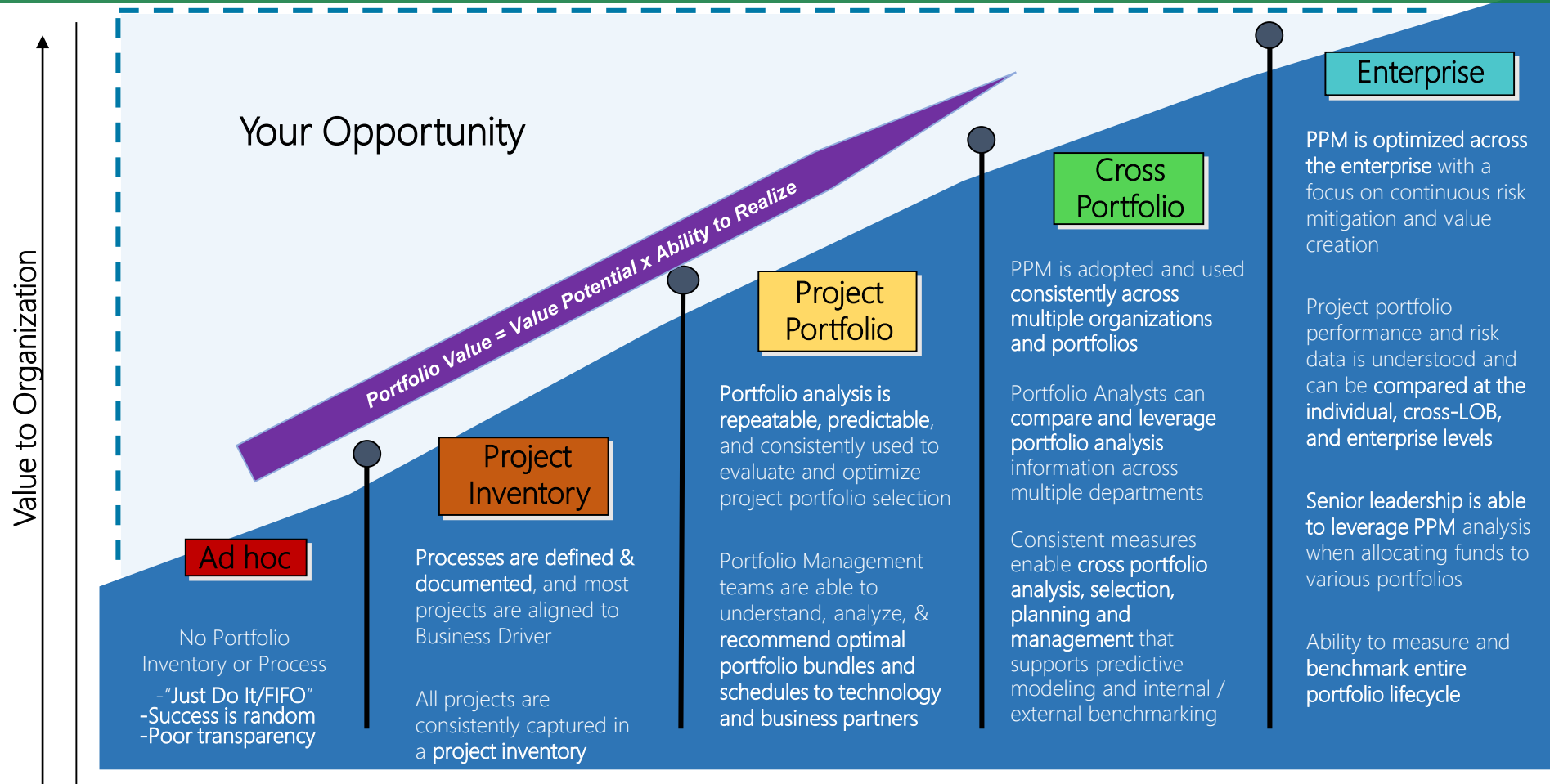
Flexible  
Reporting  
& Analytics

Integrated solutions for individuals, teams and major programs



# Roadmap to PPM Maturity

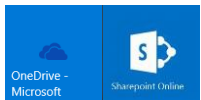
Across the Organization



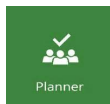
Basic

Stages of Excellence

World-Class



Crawl



Walk



Run



Well-oiled Machine



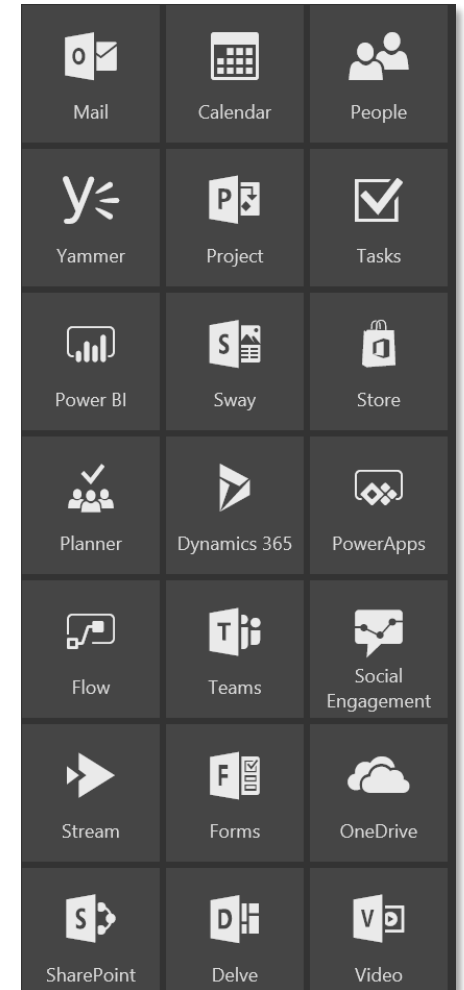
PPM Works

# Questions for You

What tools is your organization using today to facilitate collaboration and manage effort? (O365, Shared Drives, Yammer, etc)

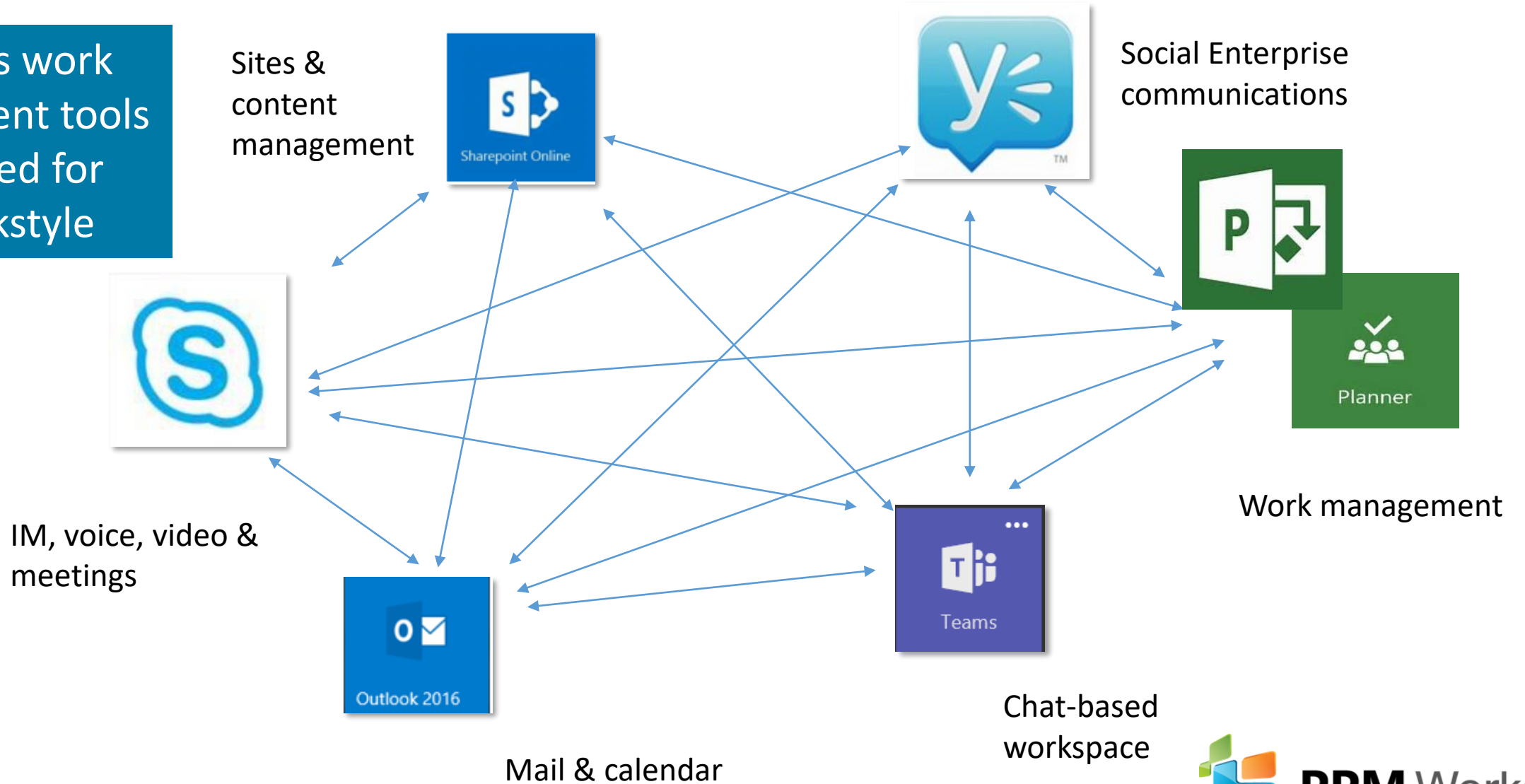
How do you know...

- 1) who is working on what?
- 2) when things are due?
- 3) if they can be completed on time?
- 4) if people are working on the right things at the right time?



# Office 365

Microsoft's work management tools are designed for every workstyle



# Office 365 Groups

Groups let you choose a set of people that you wish to collaborate with and easily set up a collection of resources for those people to share.

When a group is created you receive:

- A shared Inbox
- Shared Calendar
- Shared Documents Library
- Shared OneNote Notebook
- SharePoint Team Site
- A group is automatically created when you create a Plan

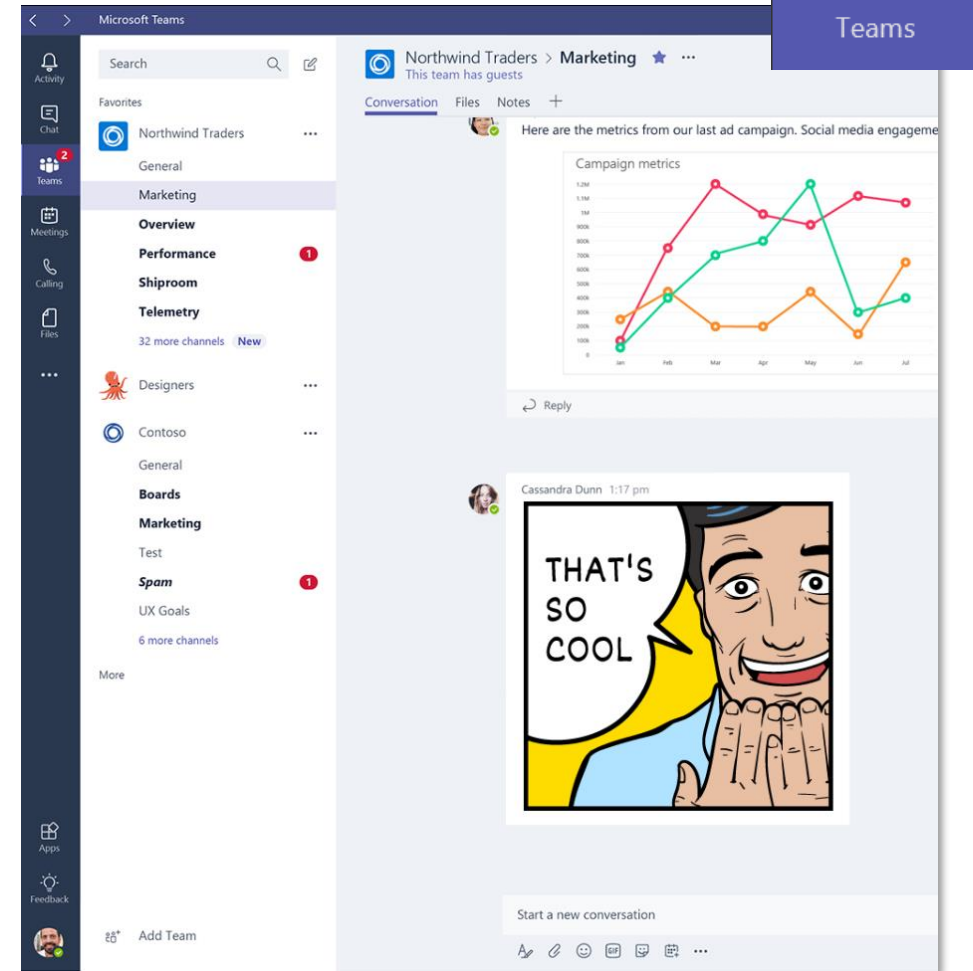
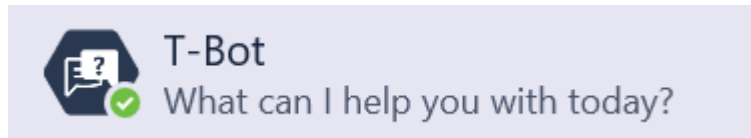
# Microsoft Teams

Microsoft Teams is a chat-based workspace in Office 365.

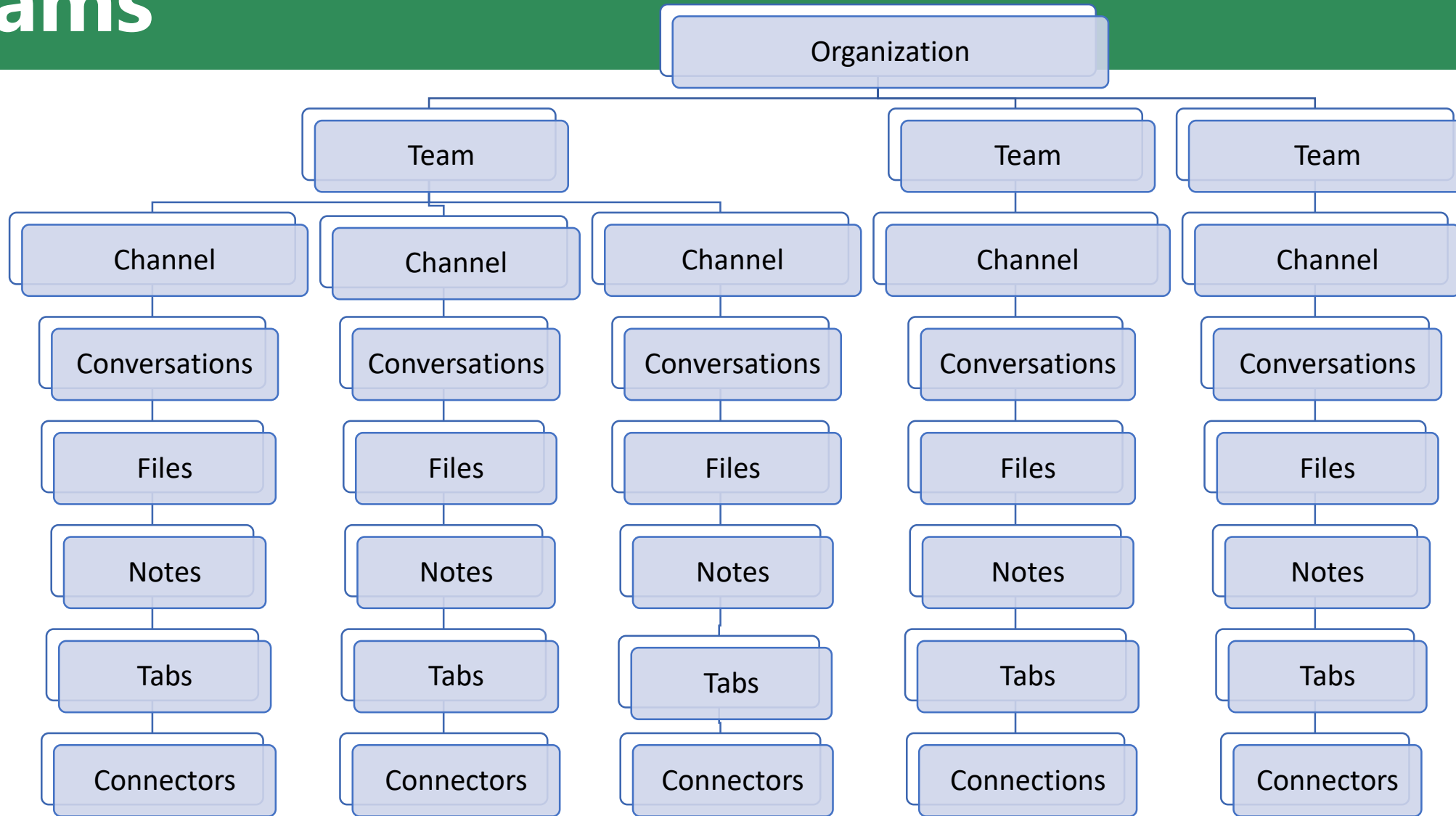
A Team is a collection of people, conversations, files and tools.

Reasons to use Teams:

- Easily communicate one-on-one or with a group
- Real time collaboration
- Files, documents, contact info, etc. all stored in one place
- Connectors allow for connecting to other tools (JIRA, Twitter, Google Analytics, Salesforce)
- Bot integration



# Teams

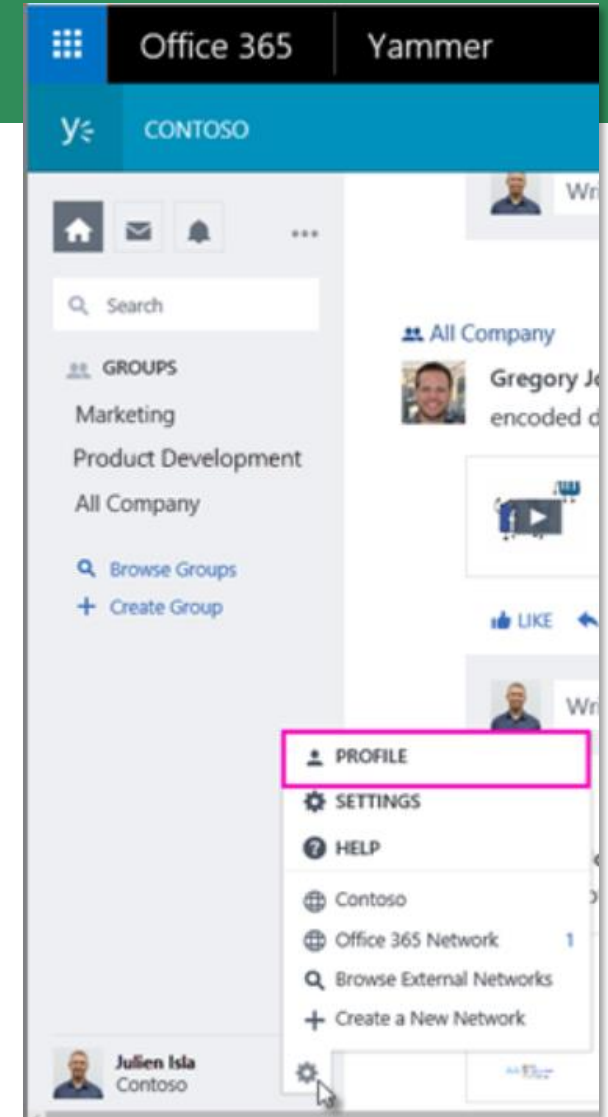


# Yammer



Yammer is a private social network that enables companies to share and collaborate.

- Share information across teams
- Crowdsourcing answers from coworkers
- Secure - only visible to people within your organization
- Edit and co-author documents using Office Online



# Skype for Business



Skype for Business lets you connect with co-workers or business partners in your company or around the world.

- Instant message conversations
- Voice or video calls
- Online presence
- Schedule and join meetings
- Present during meetings
- Allow others to present or give control
- Set security strength for meetings

# Planner

## New Office 365 service

Fully integrated into the suite and Office 365 Groups

## My work organized

Access the Planner Hub, My Tasks, and all Plans ordered by activity

## Interactive Boards

Track and organize your team's work by moving cards between columns

Office 365 | Planner

Bright Marketing Retreat

group by bucket

Not started 4 To do 5 For team review 3 + new bucket

Finish company picnic slideshow

Complete volunteer assignments

1	Jeff Smith	Proseware, Inc.	6/12/2012	8:30 AM
2	Rudolf Pratner	Litware, Inc.	6/12/2012	9:00 AM
3	Phyllis Harris	Northwind Traders	6/12/2012	9:30 AM
4	Aaron Michelle	Lucerne Publishing	6/12/2012	10:00 AM
5	Brian Welcker	Marga's Travel	6/4/2012	10:30 AM
6	Jeff Smith	Proseware, Inc.	6/4/2012	11:00 AM
7	Rudolf Pratner	Litware, Inc.	6/4/2012	11:30 AM
8	Jeff Smith	Proseware, Inc.	6/4/2012	12:00 PM
9	Brian Welcker	Marga's Travel	6/5/2012	
10	Brian Welcker	Marga's Travel	6/5/2012	
11	Phyllis Harris	Northwind Traders	6/5/2012	

volunteerasignments

MarketingRetreatCatererOptions

Choose event venue

Obtain corporate sponsor logos

We need to give the ABC banners and signs our official corporate sponsor logos either in .eps format or in a PDF

Wendy Richardson

Finalize budget

Guys, this is way over due and we may spend more than we really can afford. Finance will not be happy.

Josh Bailey

Confirm flights

Confirm-John's-Southwest-flight

Order custom pens

## Build your team

Built in experience for adding members and assigning work

## Customizable columns

Customize each board to the exact needs of your team, process, and content.

## Visual and engaging

Document previews, images, and summary in stats make it easy to get an overview



# Planner Task Details

## Focus on the details

Rich details experience include progress, start and due dates, assignments, and description.

## Documents and attachments

Easily upload new files, attach links, or pick from existing OneDrive for Business content

The screenshot displays the Microsoft Planner interface. The main task is 'Finish company picnic slideshow', assigned to Kat Larsson, with a due date of 4/30. The task description includes a photo of a picnic and text: 'The slideshow will be played without an MC- during the meet and greet and also during the reception. It will likely need music as well. For context, the slideshow will be played without an MC during the meet and greet and also.' The attachments section shows several files, including 'MarketingRetreatCa', 'MarketingRetreat', 'companypicnicslideshow.jpg', 'businessPlan', and 'businessPlan2'. The comments section shows a comment from David Jaffe: 'Josh, make sure you get at least 15 volunteers. We need to make sure there are enough people to cover each station for the entire day.'

## Custom labels

Highlight key tasks with colorful customizable labels.

## Checklists

Breakdown complex items into manageable steps. Jot down ideas to make progress (GA)

## Conversations

Discuss each task to get things done. Conversations show up in Outlook clients and are powered by the Outlook services.



# Planner Hub and Charts

Office 365 Planner

Planner Hub

My Tasks 14

Plans

New plan

Favorites

Blue Yonder 15

Adventure Works 12

Bright Dreams 2

Contoso Design 5

Tailspin Toys 5

More plans

Coho Vineyard 8

Winglip Toys 8

Wide World Import 8

Blue Yonder: 15 TASKS LEFT, 3 days left. Status: 9 Not Started, 1 Late, 14 In Progress, 7 Complete.

Adventure Works: 12 TASKS LEFT, 3 days left. Status: 9 Not Started, 1 Late, 14 In Progress, 7 Complete.

Bright Dreams: 2 TASKS LEFT, 3 days left. Status: 9 Not Started, 1 Late, 14 In Progress, 7 Complete.

Contoso Design: 5 TASKS LEFT, 3 days left. Status: 9 Not Started, 1 Late, 14 In Progress, 7 Complete.

Tailspin Toys: 5 TASKS LEFT, 3 days left. Status: 9 Not Started, 1 Late, 14 In Progress, 7 Complete.

**Favorite Plans**  
See stats across your favorite plans

**Built in Charts**  
See the latest stats. Drill into charts to see specific tasks for each category.



Office 365 Planner

Bright Marketing Retreat

Cards Charts

Status: 19 tasks left, 0 days left. Status: 12 Not started, 4 Late, 3 In progress, 31 Completed.

Buckets

Bucket	Count
To Do	14
Phase 1	12
Phase 2	8
Phase 3	2
Review	14
Send	2

Assignments

Assignee	Count
Unassigned	14
John Ryan	1
Kat Larsson	3
Cam Chancellor	2
Enrique Dominguez	4
Bruce Irvin	6
Michael Bennett	1
Fernando Rodney	1

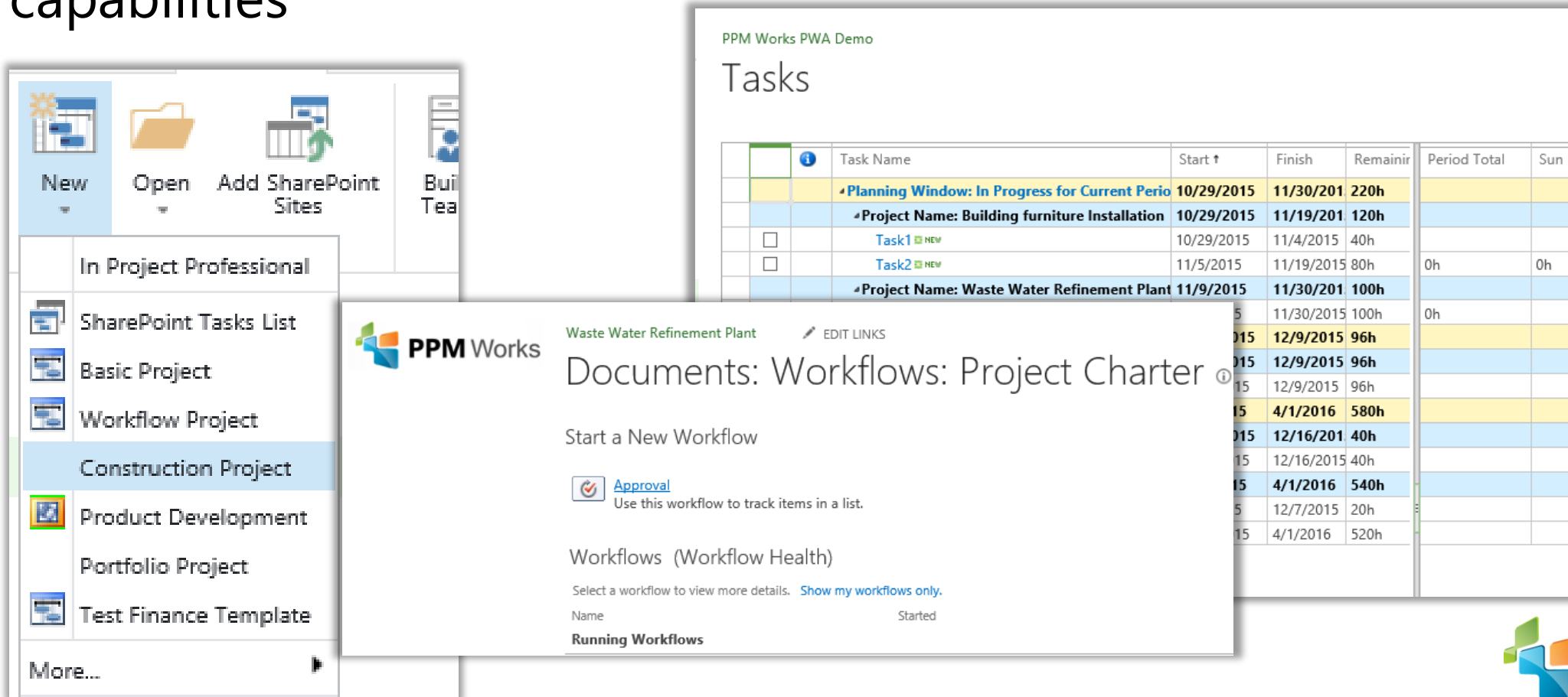
To do Tasks

- Not Started
- Finish company picnic slideshow (Assigned to Kat Larsson, 4/30)
- Finish company picnic slideshow (Assigned to Kat Larsson, 4/12)
- Finish company picnic slideshow (Assigned to Kat Larsson, 4/30)
- Finish company picnic slideshow (Unassigned, 4/30)
- Finish company picnic slideshow (Assigned to Kat Larsson, 4/30)
- Finish company picnic slideshow (Assigned to Kat Larsson, 4/12)
- In Progress
- Finish company picnic slideshow (Assigned to Kat Larsson)

# Task Management

Project Creation, Task Updates, and Document Approval Workflow

Leveraging out of the box Project Creation and tracking/approval capabilities



The screenshot displays the PPM Works PWA Demo interface. It features a 'Tasks' table with columns for Task Name, Start, Finish, Remaining, Period Total, and Sun 1. Below the table, there is a 'Documents: Workflows: Project Charter' section with an 'Approval' workflow option. The interface also shows a 'New' menu with options like 'SharePoint Tasks List', 'Basic Project', 'Workflow Project', 'Construction Project', 'Product Development', 'Portfolio Project', and 'Test Finance Template'.

Task Name	Start	Finish	Remaining	Period Total	Sun 1
Planning Window: In Progress for Current Perio	10/29/2015	11/30/2015	220h		
Project Name: Building furniture Installation	10/29/2015	11/19/2015	120h		
Task1 NEW	10/29/2015	11/4/2015	40h		
Task2 NEW	11/5/2015	11/19/2015	80h	0h	0h
Project Name: Waste Water Refinement Plant	11/9/2015	11/30/2015	100h		
		11/30/2015	100h	0h	
		12/9/2015	96h		
		12/9/2015	96h		
		12/9/2015	96h		
		4/1/2016	580h		
		12/16/2015	40h		
		12/16/2015	40h		
		4/1/2016	540h		
		12/7/2015	20h		
		4/1/2016	520h		

Documents: Workflows: Project Charter

Start a New Workflow

[Approval](#)  
Use this workflow to track items in a list.

Workflows (Workflow Health)

Select a workflow to view more details. [Show my workflows only.](#)

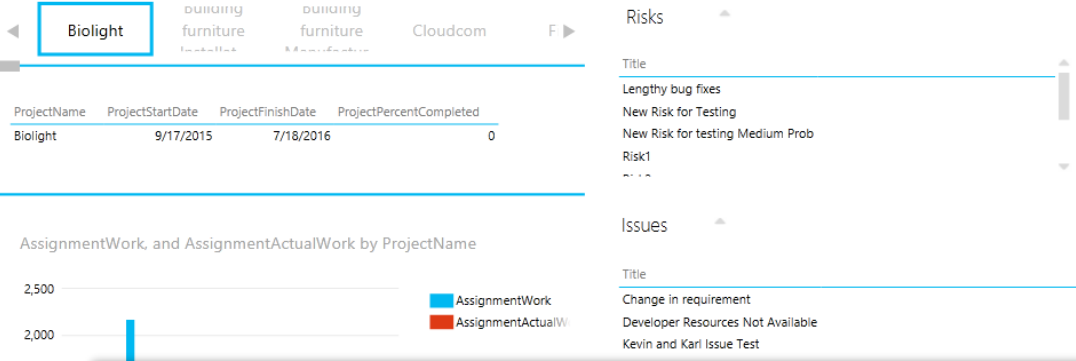
Name	Started
Running Workflows	

# Risk / Issue Management

Flexible Reporting including Excel, Power BI, Dash boarding



## Project Overview Dashboard



Issues list in the application. The list shows two items:

ID	Title	Assigned To	Status	Priority	Category	Due Date
3	Kevin and Karl Issue Test	Jacques Goupil	(3) Closed	(2) Medium	(2) Category2	1/1/2011
4	New Issue	Jacques Goupil	(1) Active	(2) Medium	(2) Category2	

# Use Case Scenario #1

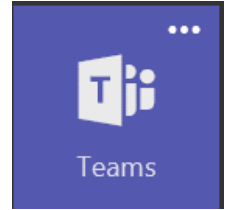
Kelly Krout is the VP of public relations. She **leads the marketing effort** for a marathon her company hosts each year, which begins with writing the **press release**.

In Previous years, she spent the bulk of her time **soliciting and managing feedback** from her team. **Email, ad hoc phone calls and short meetings** made writing the press release tedious and complex.

She wants to be able to streamline her effort in **capturing notes, coauthoring and real-time collaboration**.

## Summary

- Long email threads
- Detailed note taking
- Real-time collaboration
- Immediate feedback
- Coauthoring



# Use Case Scenario #2

Contoso is a multinational plastics manufacturer headquartered in Seattle, WA. The Seattle-based office is in the **process of revising its US-specific chemical spill emergency procedures** to incorporate safety measure from the UK. Jeff Hay, the VP of Operations, is **leading this effort**, and would like to **coordinate with people in Contoso's London-based office** on the revisions.

This kind of global organization will require dozens of **emails and several conference calls across different time zones**



## Summary

- Input needed from an office half way around the world
- Emails
- Conference calls across different time zones
- Who should he coordinate with in London

# What to Use When

Scenarios	Yammer	Teams	Skype
I don't know who in my organization can help me	+	-	-
I want to keep a record of what we discuss during the meeting (conversation, links, files)	-	+	-
I want to quickly share a file with the team	+	+	-
I want to integrate with outside tools like Salesforce	-	+	-
I want to deliver a presentation	-	+	+
I want to create a document	+	+	-
I need to have a quick 1:1 conversation	-	-	+
I want to promote a company event on social media	-	+	-
I found a comprehensive white paper that I want to share with my entire organization	+	-	-

# When to Use Planner vs Project Online

Use Case	Planner	Project Online
I need to track tasks but I am unfamiliar with project management tools.	X	
I want to quickly enable my team to use OneNote, Outlook, SharePoint.	X	
I am resistant to learning a new tool.	X	
I prefer a detailed WBS, with task dependencies, and task tracking against baselines.		X
Our organization uses timesheets to track task progress.		X
I need to track progress for all my projects and the portfolio level with executive visibility.		X
I need to create custom views, groups, and filters for tasks		X
I want to easily track risks, issues, and deliverables		X
I want to manage my project schedule in Microsoft Project and allow the flexibility for team members to track and progress their tasks where they prefer. I need visibility of progress and who is doing what.	X	X
I want a simplified visual that displays who is doing what and what progress has been made.	X	X
I want to use a Kanban board to visualize work	X	

# Use Case Scenario #3

Diane Prescott is a product marketing manager for Contoso, which specializes in cutting-edge consumer technology. She's leading the **planning efforts** for an upcoming tech conference where Contoso will showcase one of its newest products, a virtual reality headset named the Wingtip.

She spends most of her time **coordinating tasks by email and debriefing on progress with her team once a day by phone.**

Contoso has robust project management software, but it's much too involved for Diane, whose expertise is in marketing, not project management.

## Summary:

- Planning efforts
- coordinates tasks by email
- Daily Progress (by phone)
- Contoso has robust project management software
- Too involved for Diane, whose expertise is in marketing, not project management.



# Use Case Scenario #4

Raul Peterson is a project manager for Contoso, which specializes in cutting-edge consumer technology. He manages many **projects across the organization** and requires **visibility** as to the status of his projects. He needs more time in the day for **project status**. Raul needs to create cross project **dependencies**, and **track issues** and **risks** across projects. Contoso has **robust project management software** and Raul wants to use it.

## Summary:

- Project pro is known
- Cross-project Task view
- Automate status reports
- Track Issues, Risks and create cross project dependencies



# Use Case Scenario #5

Diane Prescott and Raul Peterson both work for Contoso, which specializes in cutting-edge consumer technology. As a product manager and project manager they both want the **flexibility to choose** how they manage their projects and tasks.

They need to be able to **associate files with individual tasks** and provide a **central repository** for project and task related documents. Their managers want to see **reports for all of their projects**. They also want to be able to **view high-level project status**.



## Summary:

- Tool integration allows for using both Planner and Project Online
- Document libraries
- Portfolio-level and project-level status reports
- Custom views
- Best of both worlds

# Feature Comparison

Feature	Planner	Project Online
Portfolio Views	-	+
Portfolio Views with indicators	-	+
Supports Master Projects/Sub Projects	-	+
Mobile Friendly views	+	+
Create custom views	-	+
Custom project-level fields	-	+
Security – who can view/edit project/plan	+	+
Project-level discussion and collaboration	+	+
Task-level discussion and collaboration	+	-
Graphical task-level view	+	+
My Task Summary view	+	+

# Feature Comparison

Feature	Planner	Project Online
Upload documents associated with projects	+	+
Assign task to multiple resources	+	+
Track effort and cost	-	+
Associate documents with individual tasks	+	+
Scheduling engine (Start and Finish calculated by predecessor/successor Tasks)	-	+
Manage issues, risks, and deliverables	-	+
Timesheets	-	+
Customize the User Interface	-	+
Additional costs for Planner/Project Online	-	+
Multiple levels of tasks supported	-	+
Templates	-	+

# Announcements From Ignite

- Project Professional and Agile come together
- Project Professional Integration with Planner

Email questions to [info@ppmworks.com](mailto:info@ppmworks.com)

Please visit our website for additional information [www.ppmworks.com](http://www.ppmworks.com)

# Contact Us

**We'd Love to Hear From You, Get In Touch With Us!**

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# Question and Answer



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