

Work management on the Microsoft platform

Planner Premium Proof of Concept with PPM Works



Planner Premium Proof of Concept



Streamline and improve speed and efficiency by managing projects in an intuitive, team-based environment

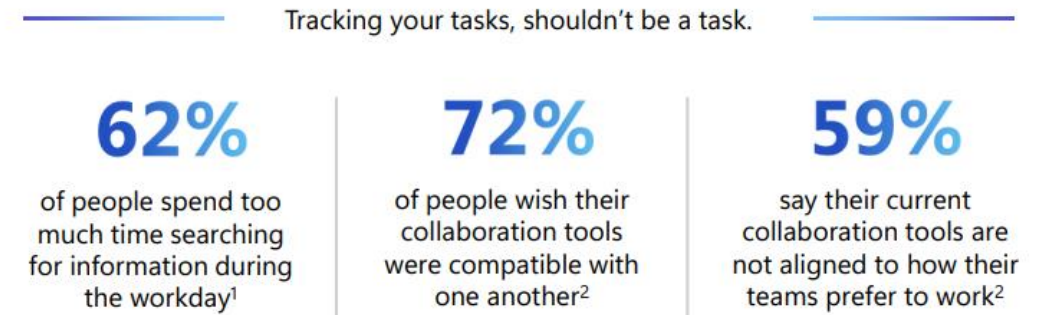
Impact of Doing Nothing

- Inability to track and manage projects easily and quickly. Lack of collaborative and enterprise work management, results in lack of team cohesiveness
- Difficulty in communicating with team members causes delays and loss in productivity
- Time is wasted waiting for teams to provide updates and managing input/communication via email; resulting in loss of time and productivity
- Lack of planning and monitoring capabilities leads to uncoordinated efforts and deteriorates overall effectiveness of the operations project
- Old, tired solutions lead to slower user adoption and less tool champions

Capabilities You Need

- **Microsoft Planner** Virtual, chat-centered workspaces to collaborate with team members on client deliverables in real time. Manage all your work in one simple place (Project collaboration. Board view. Charts view. Assignments View. Planner App. AI with Copilot.)
- **Planner Premium** Manage your portfolios, programs and resources for optimal outcomes (portfolio management. resource management, demand management. Smart design. Efficient project management. Integrated collaboration. Better decision-making.)
- **Microsoft Teams** Ability to organize teamwork, collaborate on tasks and track progress on various initiatives (Team library. OneDrive for Business.)

Value Your Business Gets



Manage all your tasks and plans in one simple, familiar experience with Planner in Microsoft Teams*

Work management landscape

Collaborative work management

Business users

Team leaders

Team members

- Individual task management
- Team projects
- Kanban boards
- Goals
- Team workload
- Dependencies
- AI

Enterprise work management

Professional project managers

Project Management Officer

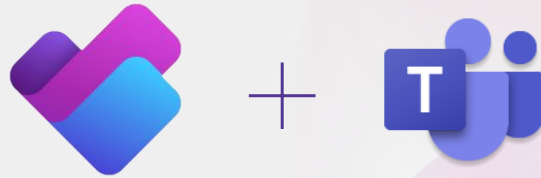
Executive team

- Portfolio management
- Agile and scrum
- Resource management
- Objectives and key results (OKRs)
- Reporting
- Cost management
- Advanced scheduling

Teams work the way they want. Enterprises get the results they need.
But disconnected apps and tools make it hard to get it all done.

The new Planner Proof of Concept

Collaborative work management



Planner in Teams

Enterprise work management



Planner Premium with
Power Apps



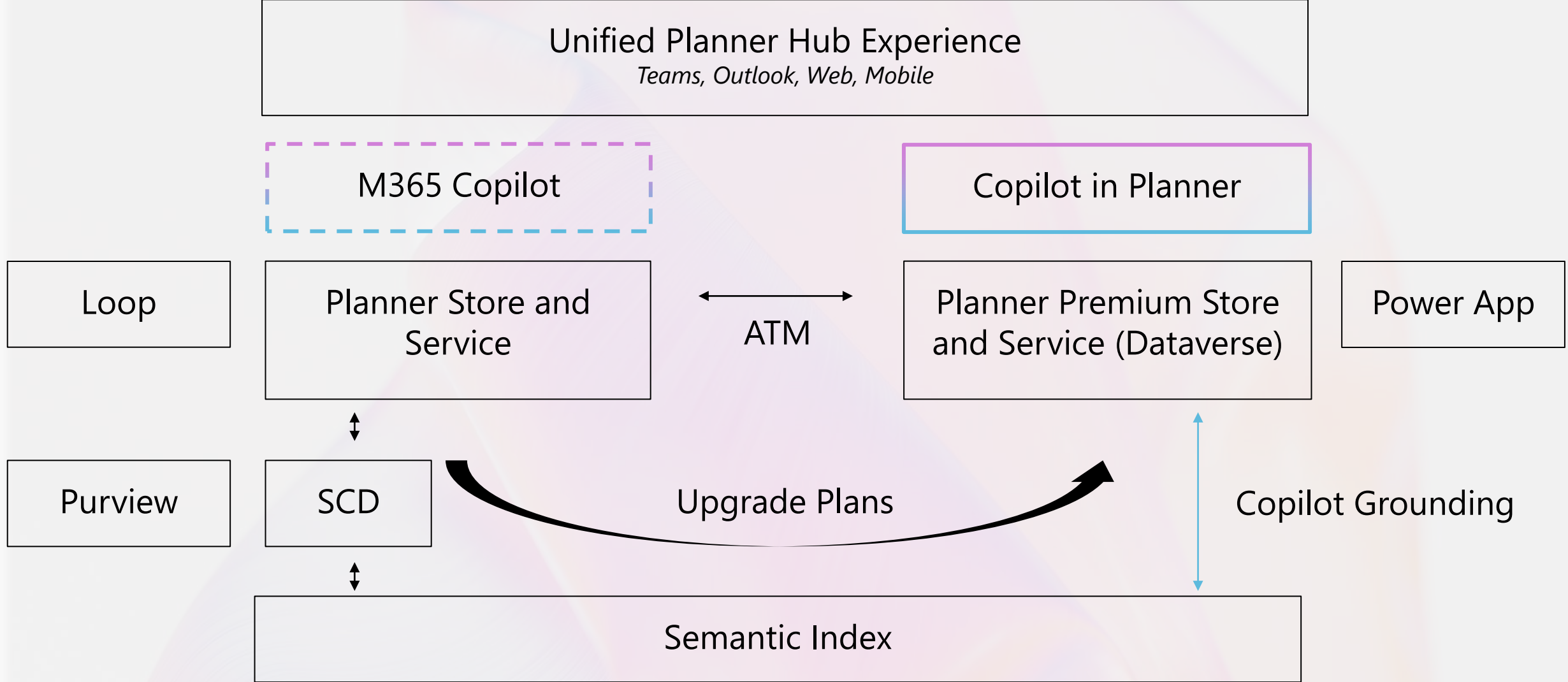
Copilot



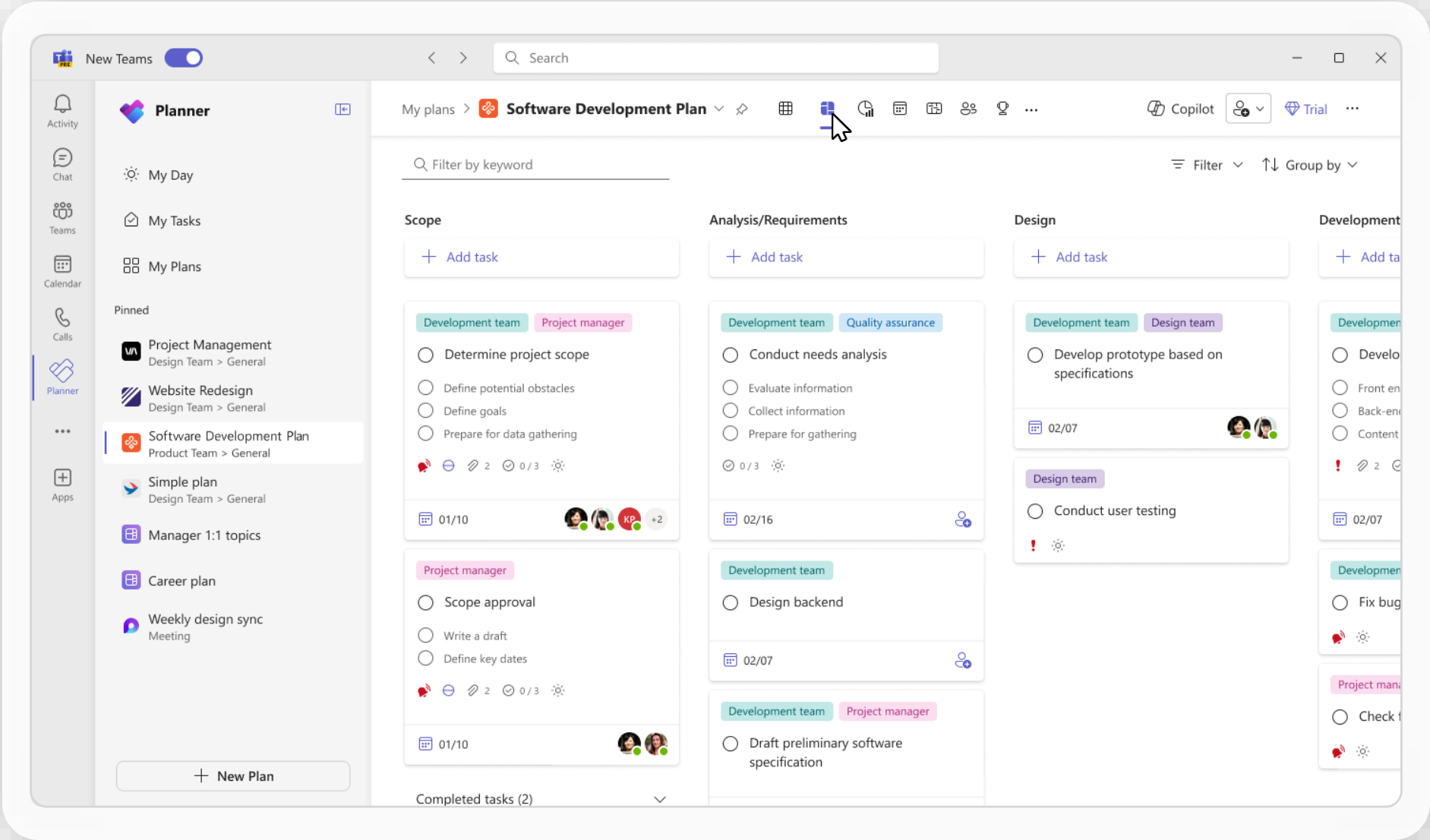
Microsoft Dataverse



Microsoft Planner Proof of Concept + Copilot



Premium POC – Board view



Premium POC – Timeline view

The screenshot displays the Microsoft Planner Premium POC interface in the 'Timeline' view. The left sidebar contains navigation options: Activity, Chat, Teams, My Plans, Pinned (Project Management, Website Redesign, Software Development Plan, Simple plan, Manager 1:1 topics, Career plan, Weekly design sync Meeting), and a '+ New Plan' button. The main area shows a list of 10 tasks with their corresponding timeline bars. A mouse cursor is hovering over the 'Timeline' icon in the top navigation bar.

Task ID	Task Name	Assignee	Start Date	End Date
1	Review customer data and	[Avatar]	Jun 27	Jul 11
2	Review corporate sales fig	[Avatar]	Jun 27	Jul 4
3	Identify service/product	[Avatar]	Jul 4	Jul 18
4	Complete SWOT analysis	[Avatar]	Jul 11	Jul 18
5	Establish go-to-markets	[Avatar]	Jul 18	Jul 25
6	Complete SWOT analysis	[Avatar]	Jul 25	Aug 1
7	Choose theme for decoratio	[Avatar]	Jul 18	Jul 25
8	Review Business Strategy	[Avatar]	Jul 25	Aug 1
9	Set marketing budget	[Avatar]	Jul 25	Aug 1
10	Set marketing budget	[Avatar]	Jul 25	Aug 1

Premium POC – People view

The screenshot shows the Microsoft Planner interface in 'People view' for a 'Software Development Plan'. The interface is divided into a left sidebar, a top navigation bar, and a main content area.

Left Sidebar: Contains navigation options: Activity, Chat, Teams, My Day, My Tasks, My Plans, Pinned (Project Management, Website Redesign, Software Development Plan, Simple plan, Manager 1:1 topics, Career plan, Weekly design sync Meeting), and Apps. A '+ New Plan' button is at the bottom.

Top Navigation Bar: Shows 'My plans > Software Development Plan' with various view icons (grid, calendar, etc.) and a search bar. A mouse cursor is pointing at the 'People' icon.

Main Content Area: Features a search bar 'Filter by keyword' and controls for 'View options', 'Group by plan', 'Filter', and 'Team settings'. Below this, there are four columns representing team members:

- Unassigned:** Shows 10 Completed, 12 Incomplete, and 2 Late tasks.
- Babak Shammass:** Shows 10 Complete, 12 Incomplete, and 2 Late tasks.
- Mona Kane:** Shows 10 Completed, 12 Incomplete, and 2 Late tasks.
- Albert:** Shows 10 Completed and 12 Incomplete tasks.

Each member's view includes an 'Add task' button and a list of tasks with category tags:

- Unassigned tasks:** Sustainability and Environment, Carbon Footprint Calculator, Smart Cities, Traffic Optimization App, Education and Learning, Interactive Learning Platform, Health and Wellness.
- Babak Shammass tasks:** Development team, Design team, Develop prototype based on specifications.
- Mona Kane tasks:** Project manager, Scope approval, Design, Design team, Conduct user testing.
- Albert tasks:** Assess ROI, Find a marketing.

Premium POC – Goals view

Activity

Chat

Teams

Calendar

Calls

Planner

Apps

New Teams

Search

My plans > **Software Development Plan**

Filter by keyword

+ Add goal

85% new hire attendance on orientation day Mona K... 02/02/2022 Not started 5 tasks

Name	Assigned to	Priority	Finish
1 <input checked="" type="checkbox"/> Create an ad budget		Urgent	02/02/2022
2 <input checked="" type="checkbox"/> Look into advertising vendors		Medium	02/02/2022
4 <input type="checkbox"/> Come up with keywords		Medium	02/02/2022
6 <input type="checkbox"/> Create an ad account		Medium	02/02/2022
9 <input type="checkbox"/> Write content		Medium	02/02/2022

+ Add new task

> Reduce new hire help desk tickets by 30% Kat Lars... 02/02/2022 Not started 5 tasks

> Have 90% of employees set up for direct deposit in the first week 02/02/2022 Not started 11 tasks

+ New Plan

Professional projects

Lead and lag

Baselines (Wave 1)

- Single baseline
- Project-level variance
- Full storage
- Plan 3+

Increased project scale

And more...

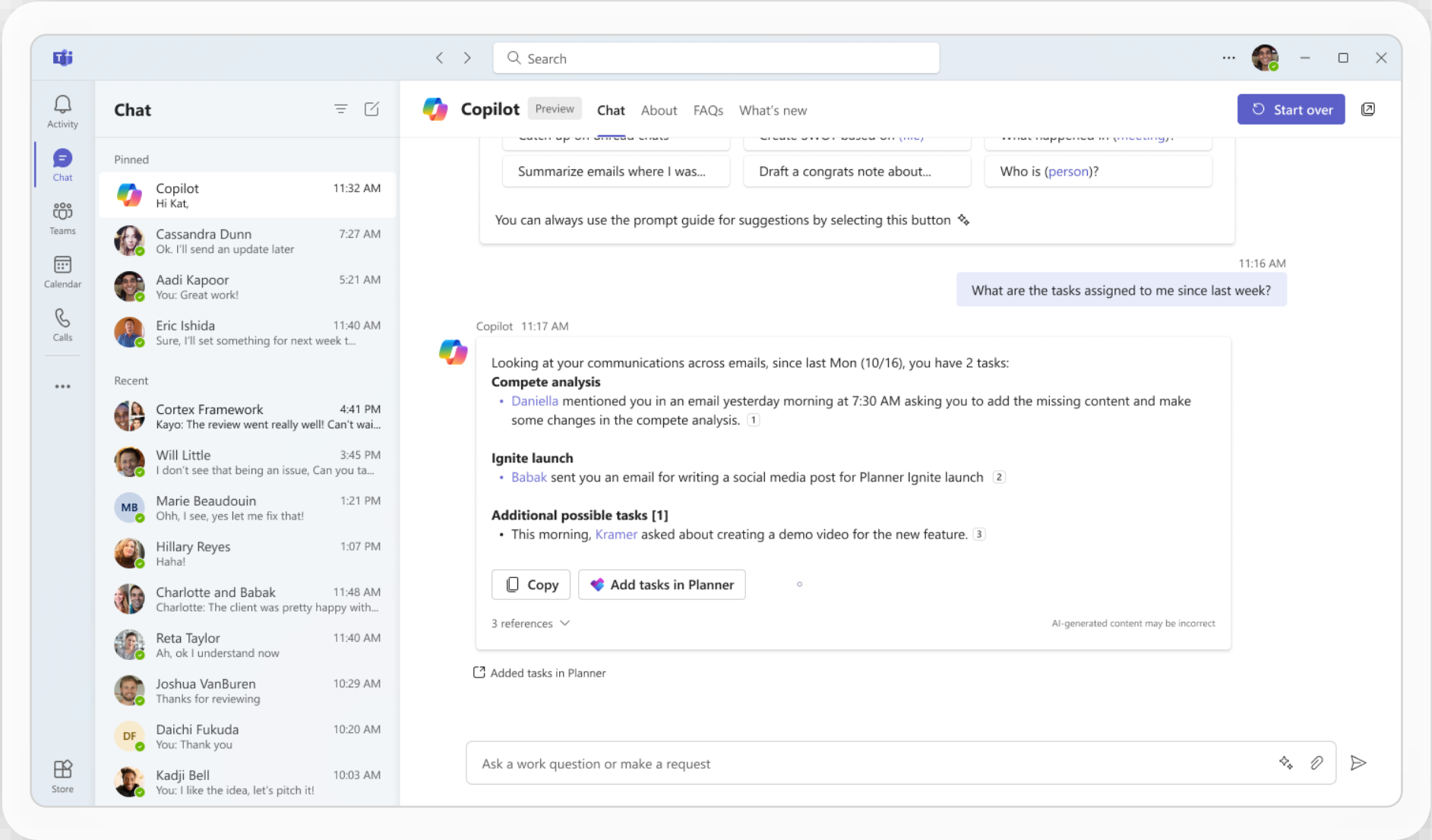
The screenshot displays a project management interface for 'Office Relocation' (Mar 2, 2023 - Jul 15, 2024). The main view is a grid of tasks with columns for Task Name, Assignee, Duration, Start, Finish, and % complete. A 'Baseline' panel on the right shows a 'Snapshot 1' created by Henry Brill on July 15, 2022. The snapshot details include Start (06/14/2023), Finish (06/21/2023), Duration (200 days), % complete (0%), Effort (400 hrs), and a Finish Variance of +7 days.

Task Name	Assignee	Duration	Start	Finish	% complete
1 <input type="radio"/> Preparing the Move		44 days	Mon 6/6	Mon 7/22	
2 <input type="radio"/> Calculate moving expenses	Elvia Atkins	15 days	Mon 6/6	Mon 7/22	
3 <input type="radio"/> Create a moving expense receipt file	Henry Brill	7 days	Tue 6/7	Mon 7/22	
4 <input type="radio"/> Create a moving binder	Henry Brill	1 day	Thu 6/8	Mon 6/6	
5 <input type="radio"/> Finances and Insurance		16 days	Wed 6/8	Thu 6/9	
6 <input type="radio"/> Review household finances	Robin Counts	3 days	Wed 6/8	Wed 6/8	
7 <input type="radio"/> Verify that your belongings are insured f...	Henry Brill	16 days	Wed 6/8	Wed 6/8	
8 <input type="radio"/> Appraise valuables specifically insured...	Henry Brill	10 days	Wed 6/8	Wed 6/8	
9 <input type="radio"/> Transfer insurance policies to your new...	Henry Brill	26 days	Wed 6/8	Thu 6/9	
10 <input type="radio"/> Transfer medical insurance to your new...	Carole Poland	6 days	Thu 6/9	Thu 6/9	
11 <input type="radio"/> Notifications		30 days	Thu 6/7	Thu 7/8	
12 <input type="radio"/> Transfer, sell, or discontinue any...	Robin Counts	2 days	Thu 6/7	Fri 6/8	
13 <input type="radio"/> Notify your employer of your moving date...	Elvia Atkins	3 days	Mon 6/11	Thu 6/14	
14 <input type="radio"/> Organize important records	Henry Brill	3 days	Mon 6/11	Thu 6/14	

Baseline Snapshot 1
Created by Henry Brill • July 15, 2022

Start 06/14/2023	Finish 06/21/2023
Duration 200 days	Finish Variance + 7 days
% complete 0%	Effort 400 hrs

Stay on top of your tasks with Copilot in Planner



Add tasks to Planner with Copilot

The screenshot displays the Microsoft Planner interface. On the left, a navigation sidebar includes 'Activity', 'Chat', 'Teams', 'Calendar', 'Calls', 'Planner', and 'Apps'. The main area shows a 'Software Development Plan' with a list of 12 tasks. The Copilot chat window on the right shows a confirmation message: 'Ok, I added tasks for a Marketing Campaign'.

	Name	Bucket	Due date
1	Review the ad copy such as headline, description, and call-to-action.	Phase 1	02/
2	Adjust bidding strategy and consider increasing the bid amount	Phase 1	02/
3	Create a visually appealing and user-friendly website to serve as the cam...	Phase 1	02/
4	Collaborate with influencers or brand ambassadors to promote the cam...	Phase 1	02/
5	Launch a paid advertising campaign on search engines and display new...	Phase 1	02/
6	Implement email marketing campaigns to nurture leads and drive custo...	Phase 2	02/
7	Launch a paid advertising campaign on search engines and display new...	Phase 2	02/
8	Implement a referral program to incentivize customers to refer friends ...	Phase 2	02/
9	Develop partnerships with media outlets	Phase 2	02/
10	Develop partnerships with relevant media outlets for press coverage...	Bucket name	02/
11	Launch campaign	Bucket name	02/
12	Conduct post-campaign evaluation for improvement.	Bucket name	02/

Extensibility & Customization

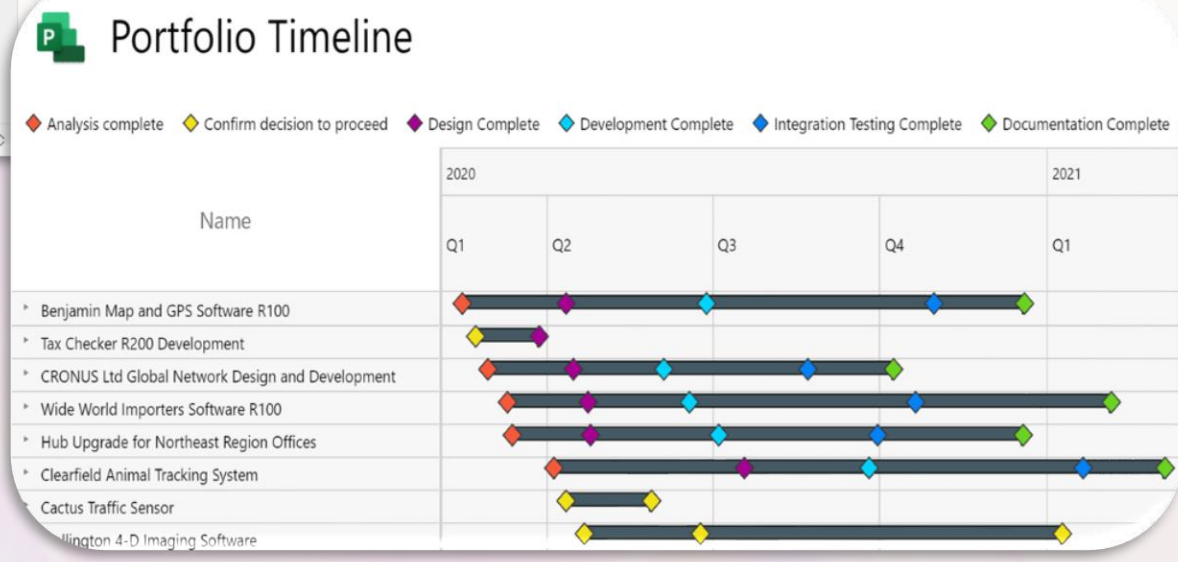
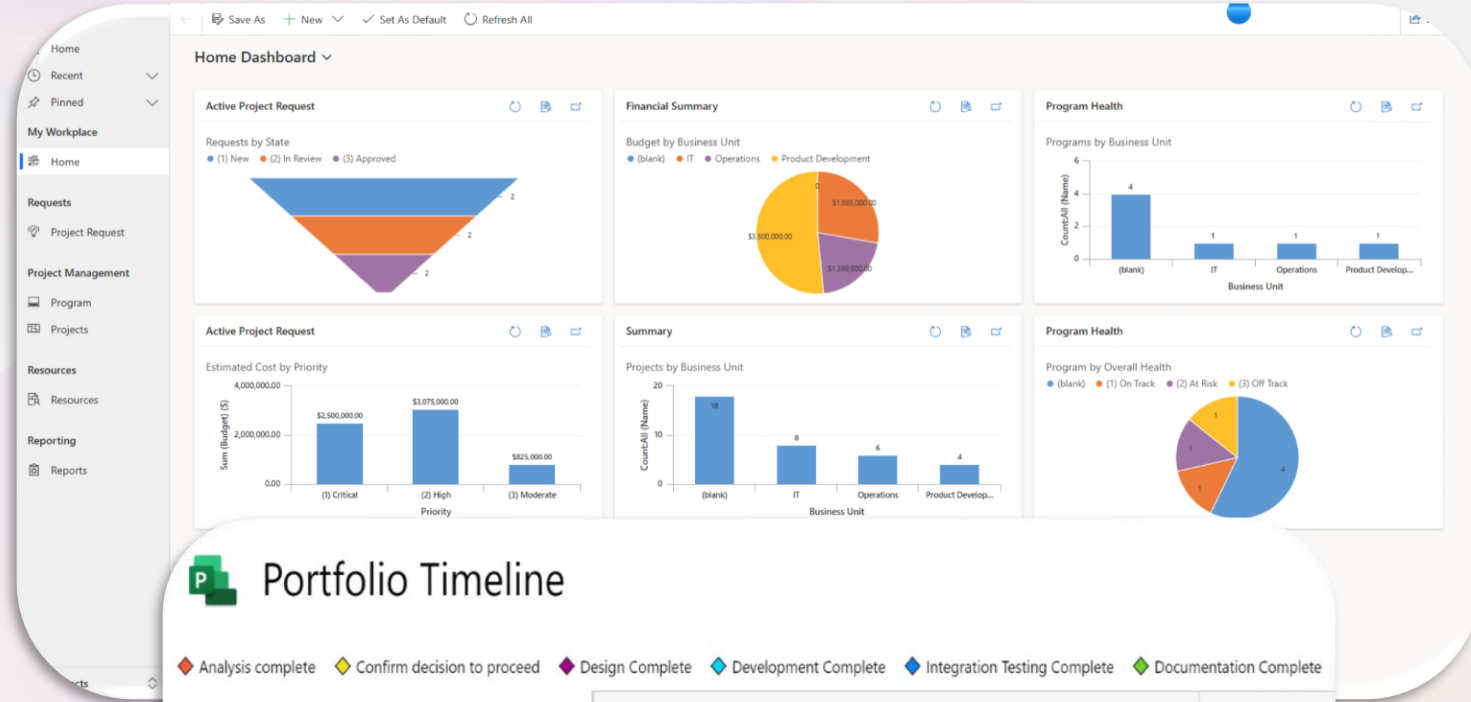
Reporting

Planner Power App

Custom tables & fields

Workflow automation

Resource management



Compliance

Planner Premium in GCC/DoD environments

Microsoft Purview

For risk, compliance, and legal teams

- Information Protection
- Data Loss Prevention
- Data Lifecycle Management
- Data Connectors
- Insider Risk Management
- eDiscovery
- Audit
- Records Management
- Communication Compliance
- Compliance Manager

