# Microsoft Planner- Outline & PI Management

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### Objective

Managing the Outlines and PIs is one of the key tasks in the entire project life-cycle. It is essential to have the right tool to do the job which can also be integrated with other functionalities in the system to manage the projects efficiently.

Considering that we'd be moving away from our current [Trello workspace](#) to the new [Microsoft Planner Workspace](#).

### Why MS Planner?

Since we are migrating to the Microsoft Office365 and adapting that eco-system we'd need to have all our tasks and project management tools under one umbrella. Microsoft Planner is a tool in the office365 ecosystem that enables us to efficiently manage our tasks. Going forward it can also be submerged with upcoming pipeline management systems (PacktCloud) thereby helping us get everything at one place.

### What is the future state that we want to achieve?

- To be able to integrate MS Planner with (CPD replacement system) PacktCloud for both, the Dynamics and Portal users including a shared document with the external stakeholders.
- Establish mapping against each Project holders in the new CPD replacement system.
- The entire PI process to be more formally managed and made visible to the respective stakeholders in the business.

### Roles and Responsibilities

Managing the outlines and PIs will be a recurring activity on MS Planner as it is one of the key element of our publishing project lifecycle. We'd want to then highlight roles and responsibilities clearly having stakeholders(designations) mapped against it. This would eliminate the ambiguity if any with regards to the process and we can ensure that everyone can do their own bit to make this process seamless.

To have this outlined we'd be using the RACI Matrix Approach, a simple responsibility assignment technique which will help us map out every task, milestone or key decision involved in completing a project.

**Responsible (R)**: People or stakeholders who do the work and to whom the task is assigned.

**Accountable (A):** Person or stakeholder who is the "owner" of the work. He or she must sign off or approve when the task, objective or make a decision it can be pushed ahead.

**Consulted (c):** People or stakeholders who need to give input on an in-progress going task if required.

**Informed (I):** People or stakeholders who need to be kept "in the picture." They need updates on progress or decisions, but they do not need to be formally consulted, nor do they contribute directly to the task.

## The RACI Matrix for Outline and PI Management:

| Tasks | AEs | AMs | CMEs | TMCW | Ed Board Members | SMs and Product Managers |
|---|---|---|---|---|---|---|
| Outline Creation | R | A | I | I | I | I |
| Outline Review | I | A | A | I | A | C |
| Outline Approval/Contracted | I | I | I | I | A/R | C |
| PI Creation | I | I | I | R | I | I |
| PI Review | I | A | I | I | A | C |
| PI Final Reviews and Approval and Locked Down | I | A | I | I | A/R | C |

## How does it work?

The following section recommends the step-by-step processes using **MS Planner** that need to be followed to achieve a lean outline management process.

1. An AE shares the latest outline template with an author and coaches him to write the required parts on route to contracting. This outline is then shared with the Editorial Board for evaluation and final approval.

The AE duplicates the following sample task on Planner and then starts working on the outline template with author(s):
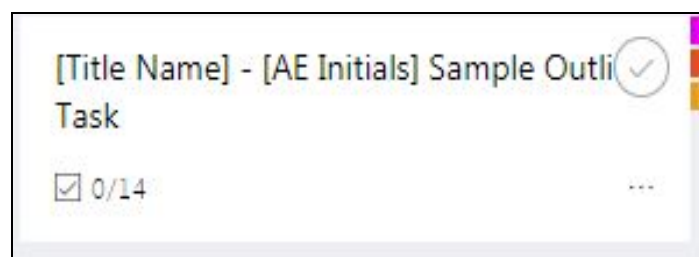


2. The AE will send the Outline to the assigned CME (refer to the Pipeline sheet for the CME name) by marking a comment "@CME Name: Please review the Outline". This will trigger a notification on CME's mailbox. The CME will then review the Outline by leaving structured comments for the Author and inform the AE with a comment "@AE Name: The review is done and any overall feedback". The CME must review the Outline within 24 hours.

3. When the AE is confident that an outline can be opened up for the AM review, he will then move the card to the following list and will assign the card to the AM:
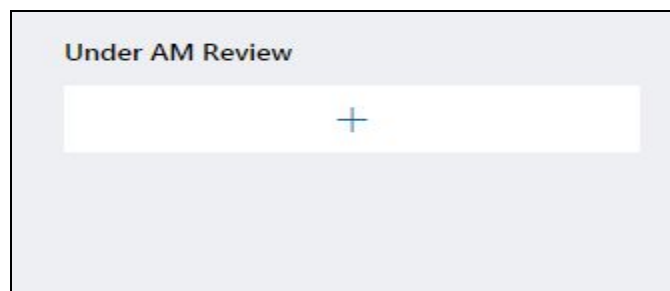


4. The AM then moves the card to the following list and assigns the tasks to all the Editorial Board members (DP, AM, and ES):

**Under Editorial Board Review**

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5. Post their review, that tasks will be either moved to one of the following lists with appropriate reasons provided:

**Approved**

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**Rejected/Cancelled**

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If an outline is approved, the AM will proceed with contracting and will also change the member responsible to TMCW (Poorva) thus indicating that the outline is ready for step 5.

6. If an outline is approved, the Technical Marketing Copywriter takes what the author has written in the outline and then extends it further to create 3 clearly-defined sections for the CW, EL, and the Book products respectively. Once completed, Poorva will move this card to the following list:

**Under PI Editorial Board Review**

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She will assign this card to all the Editorial Board members listed above.

7. If there are changes to be made, then one member of the Ed Board will move the task to the following list and assign it again to Poorva:

Reviewed- Changes Needed

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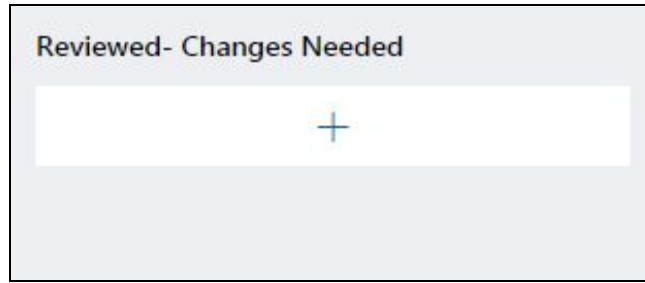
8. If the PI is locked down, then Ed Board members will move it to the following folder and assign the task to the AM:

PI Locked Down

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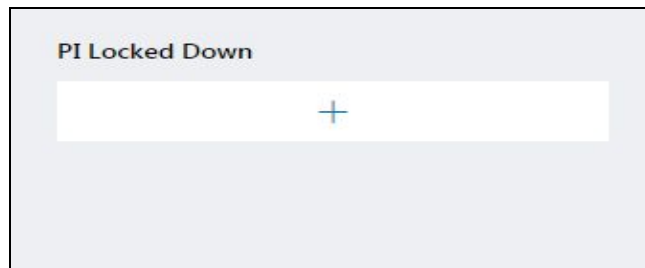
9. The AM will then transfer this locked outline and PI to a shared folder open to Partners and Sales.
https://drive.google.com/drive/folders/1TmsvsrCikBybpvloTyK1st1KCFiJYmWo?usp=sharing