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Power Platform
Conference

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CONVERSATION

#EPPC25

Unlocking Productivity: Project and Task Management with Planner and D365 Project Operations

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Global Director of Technology @ proMX
Germany

Agenda - What's in for you?

- Microsoft Product Landscape
- Overview Microsoft Planner
- Insights Dynamics 365 Project Operations
- Demonstration
- Introduction to Agents and Examples

Who is this?

GET IN TOUCH

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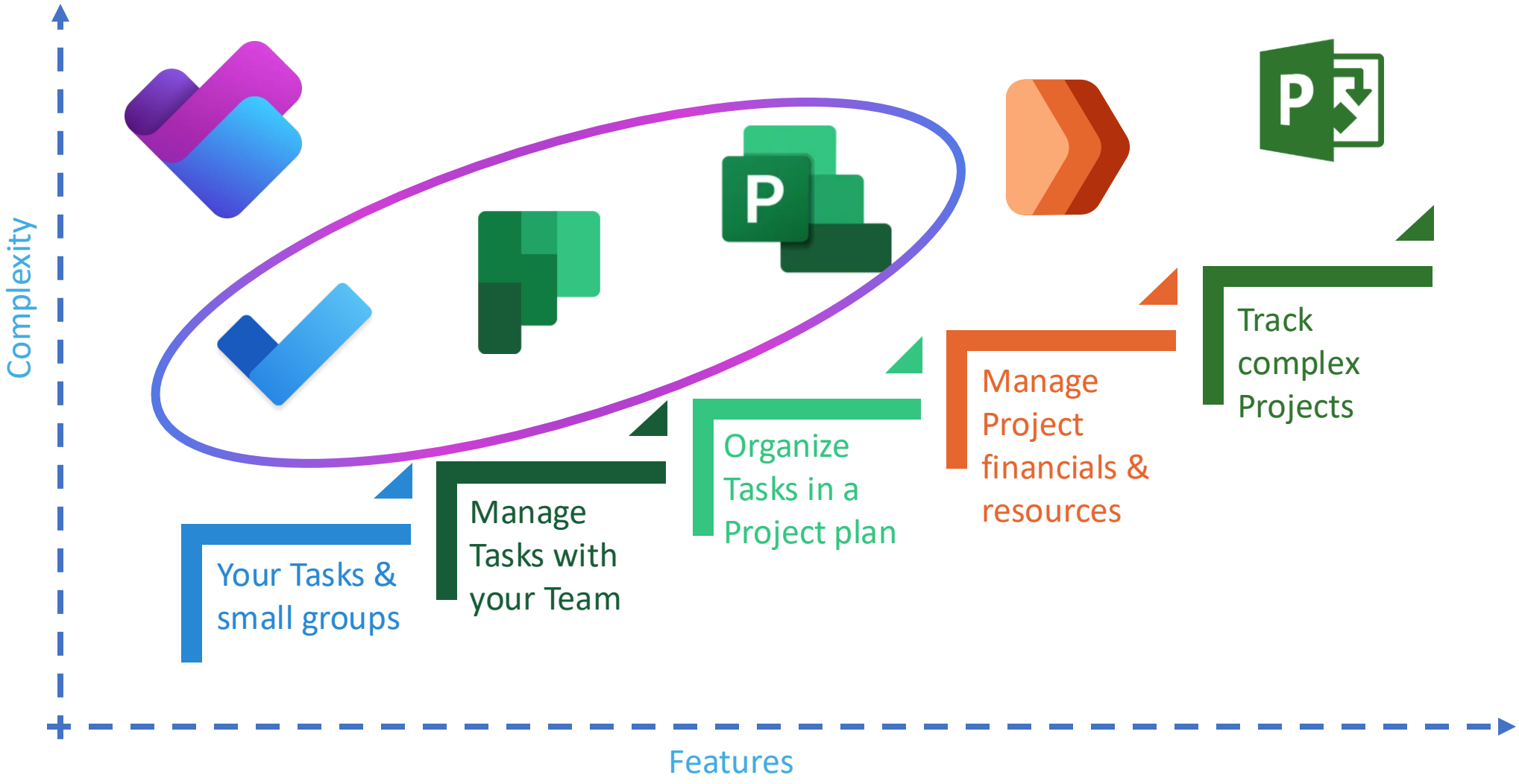
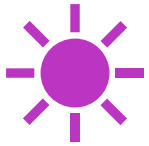
Product Landscape



Planner



- Organizing Tasks as a Kanban Board
- Multiple Views and Buckets
- Template Support

- Structure your Day
- Overview of your Tasks
- Smart Scaling

- Team Collaboration
- Integration into M365
- (Preview) Integration with Field Service

Premium Features

- Summary and Sub Tasks
- Goals
- People View
- Sprints
- M365 Copilot in Planner (preview)
- Task History
- Task conversations
- Advanced dependencies

- Timeline view
- Critical Path
- Milestone
- Custom Calendar
- Assignment View
- Custom fields
- Conditional coloring

Premium Featu

- Summary and
- Goals
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- Sprints
- M365 Copilot
- Task History
- Task conversa
- Advanced dep

		Name
1	◯	**Review Business Strategy**
2	◯	Identify service/product gaps and opportunities
3	◯	Complete SWOT analysis
4	◯	Review business model
5	◯	Review organizational marketing strategy
6	◯	Review local marketing strategy
7	◯	Review global marketing strategy

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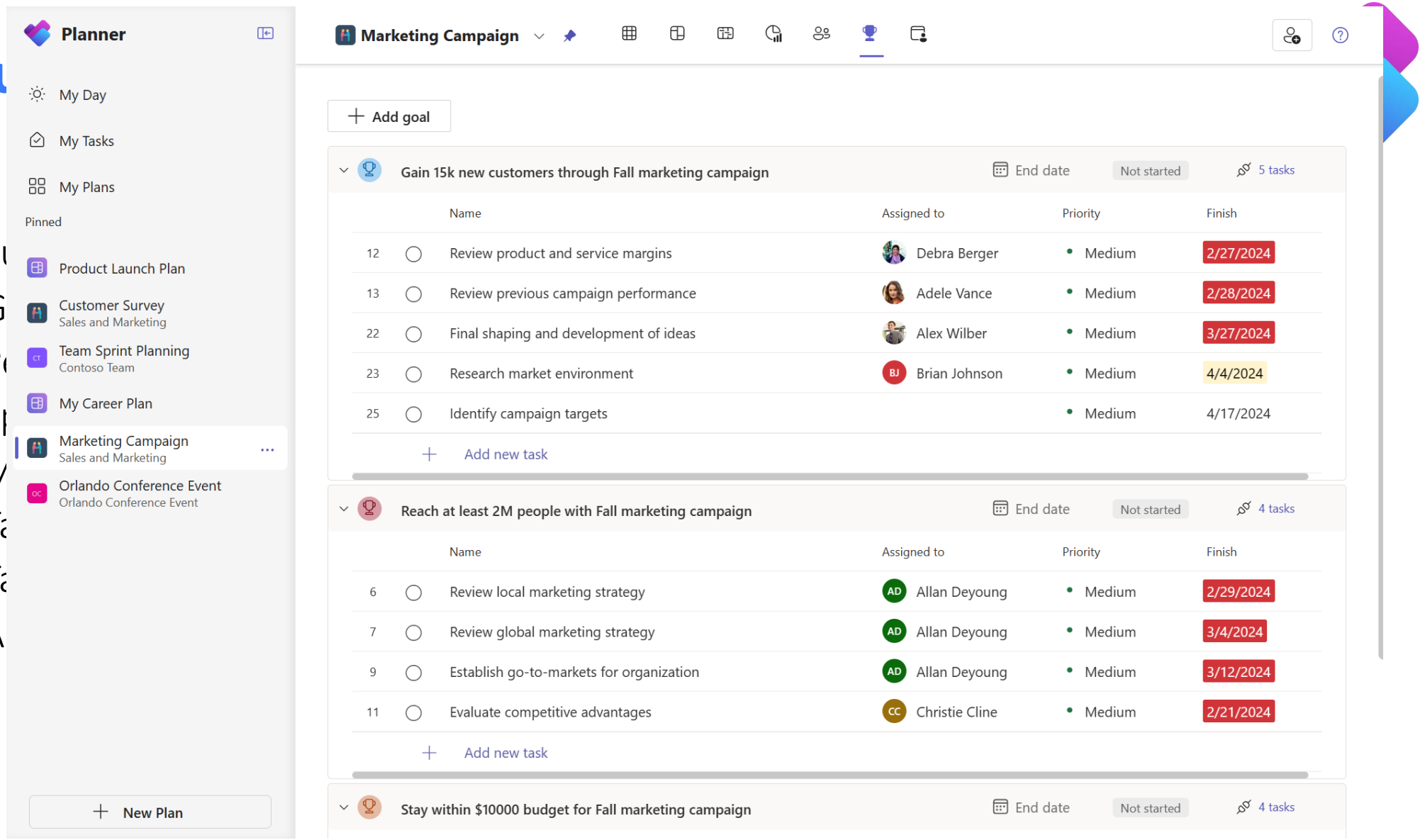

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- Summar
- Goals
- People V
- Sprints
- M365 C
- Task His
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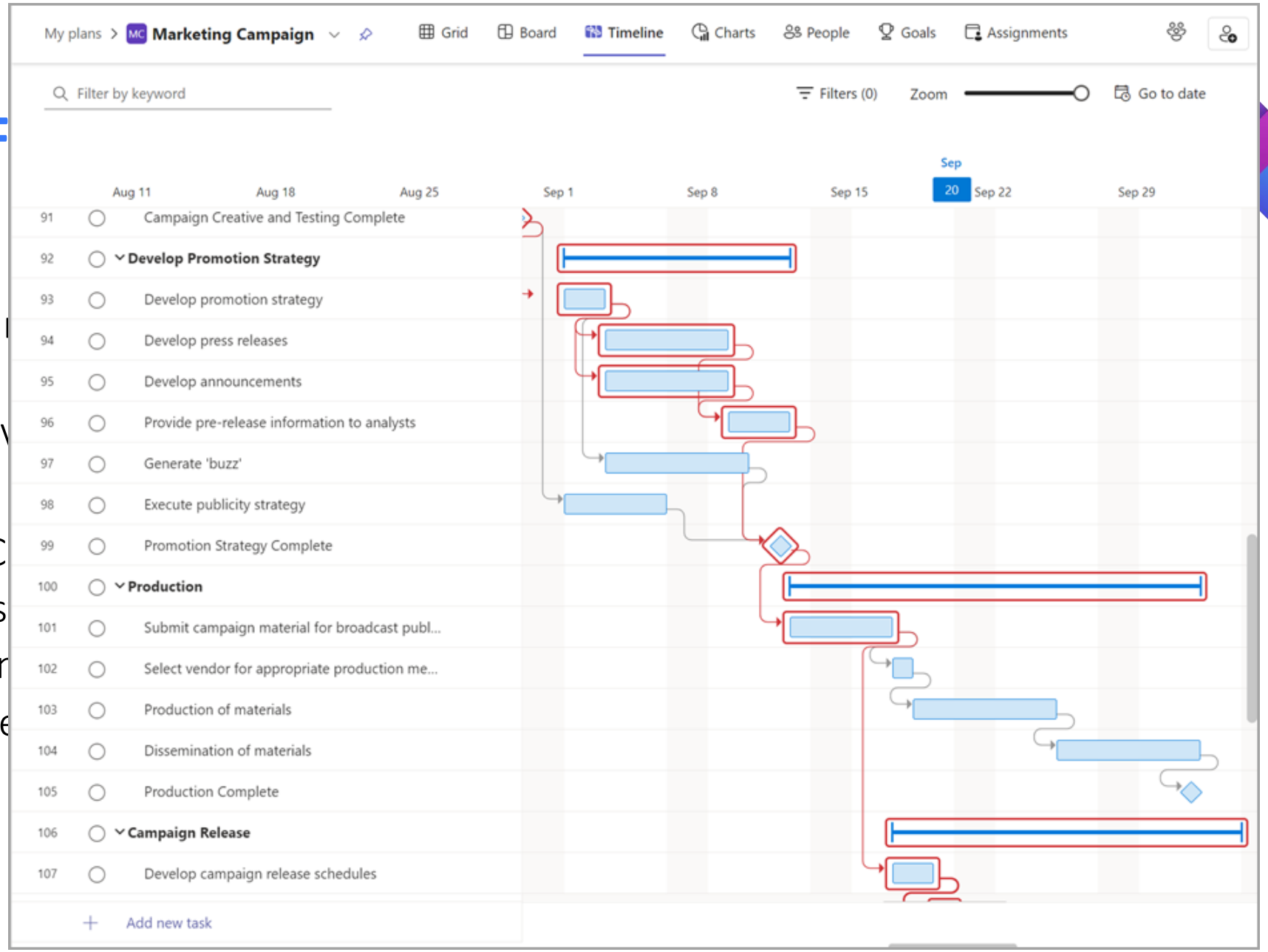
- Advance



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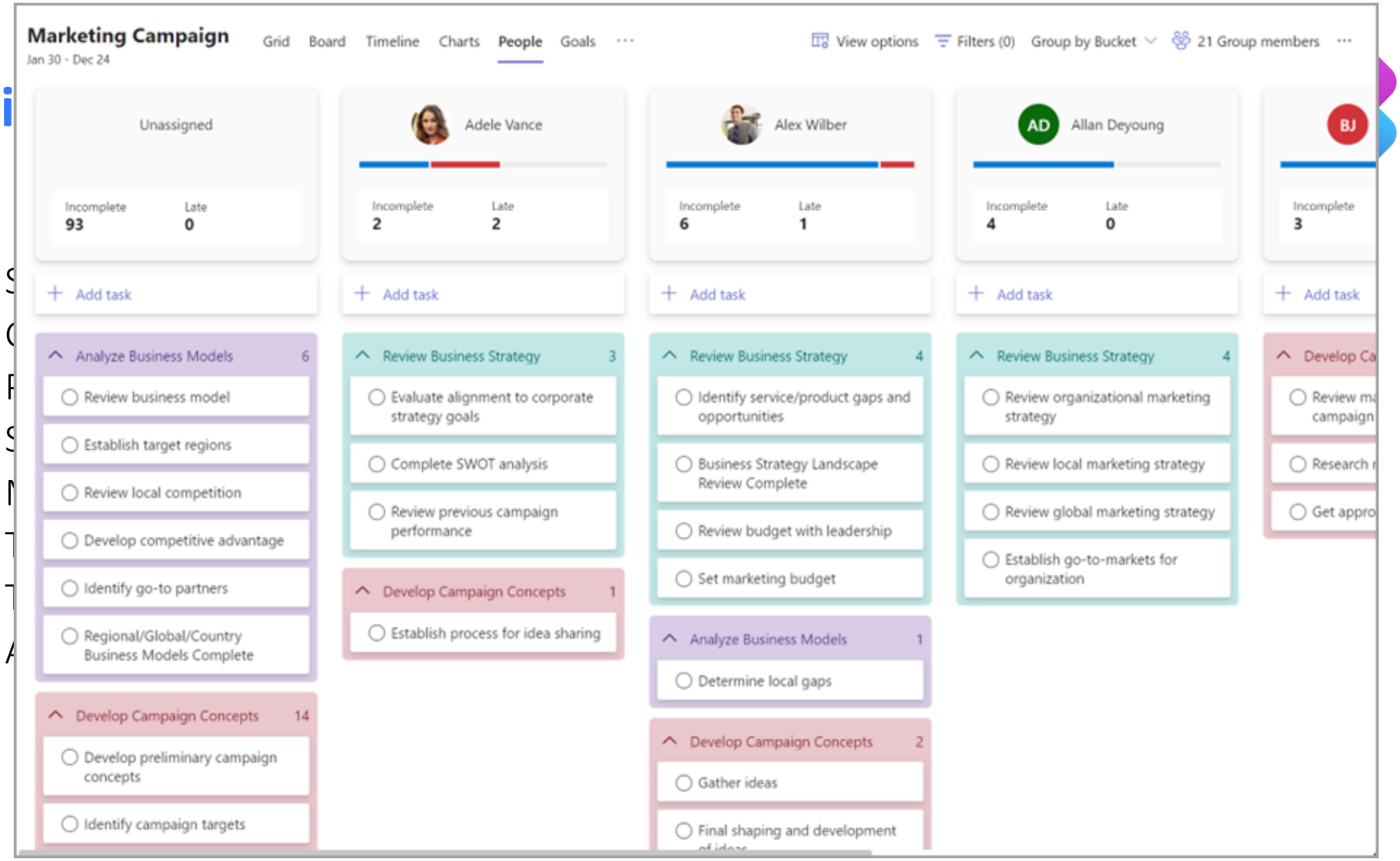

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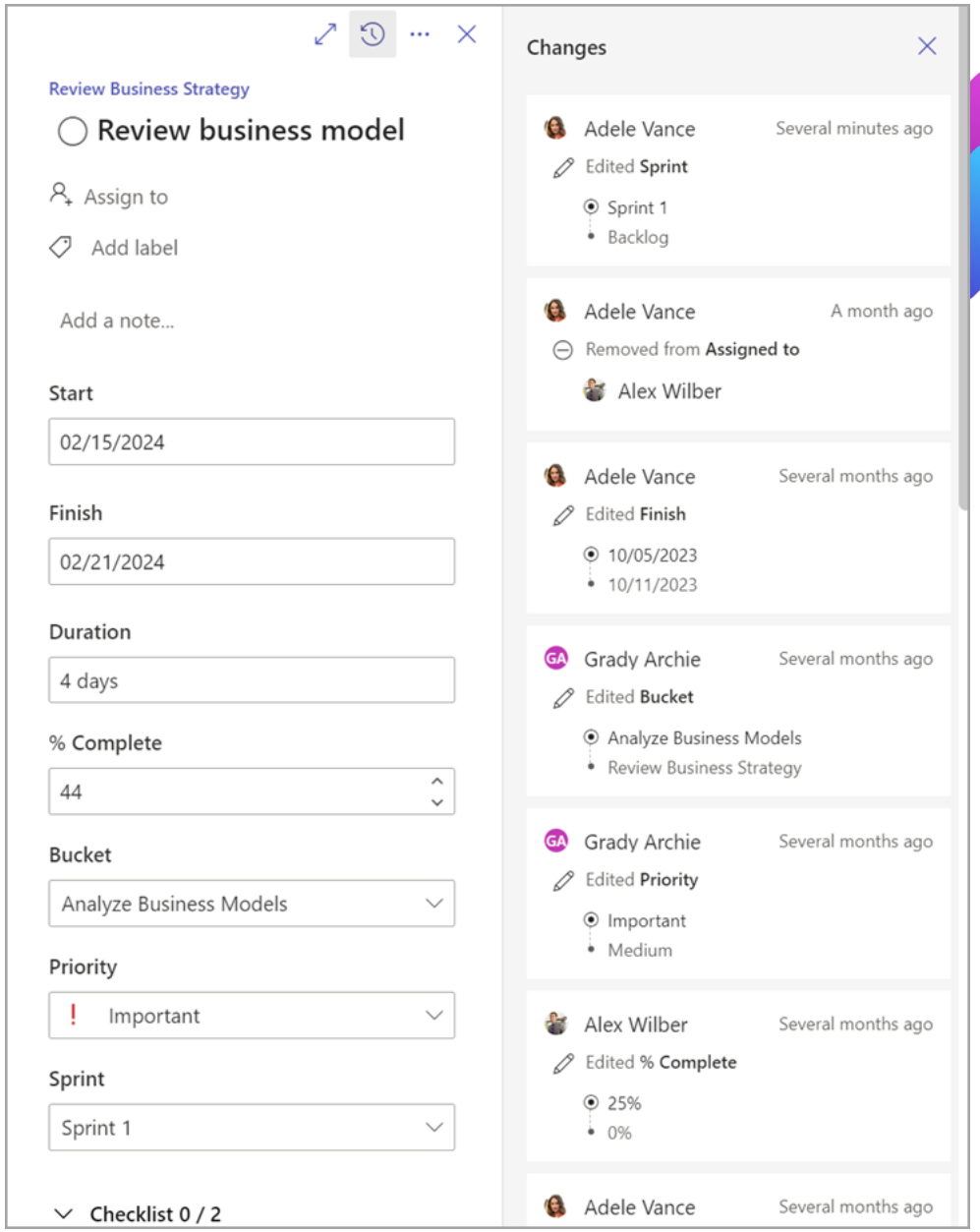


Transition to Planner

August 2025

Redirect to Planner

Automatic Transition

Users need to re-pin their Plans and Portfolios

Create Premium Plans in Planner

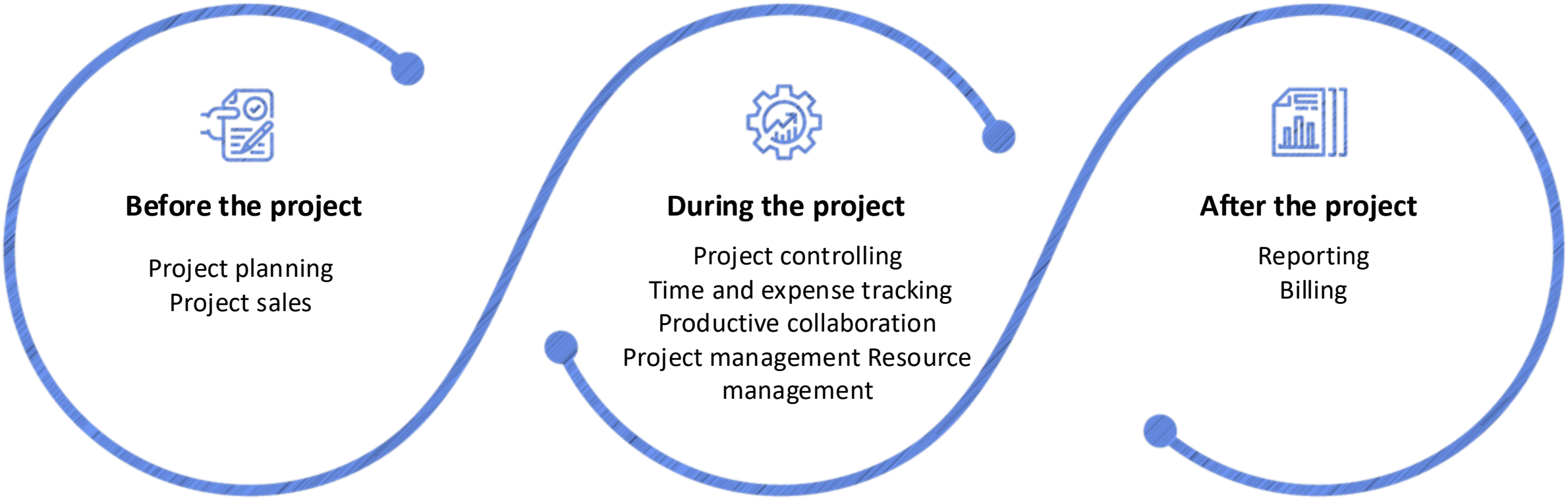
Rename of the Power App

Limitations

- Roadmap Support in Planner
- Import of .mpp files
- Recurring Tasks
- Resource staffing / control
- Time recording

Project Operations

Project Operations



Before the project

Project planning
Project sales

During the project

Project controlling
Time and expense tracking
Productive collaboration
Project management Resource management

After the project

Reporting
Billing

Personas and Use Cases

Harry
VP of Finance
Project Profitability
Forecasting
High Level Reporting

Lina
Resource Manager
Time and Expense Management
Skill-based Resource optimization

Sonja
Sales Manager
Support for Quotation
and Deal Management

Noah
Project Manager
Improved Project Execution
Task Planning
Controlling
Project Collaboration

Michelle
PMO
Project Planning and
Resource Forecasting

A Business Process with several different views and requirements

Copilot and Agents

Copilot

Human augmentation

Works as your personal assistant

There are only as many Copilots as there are people

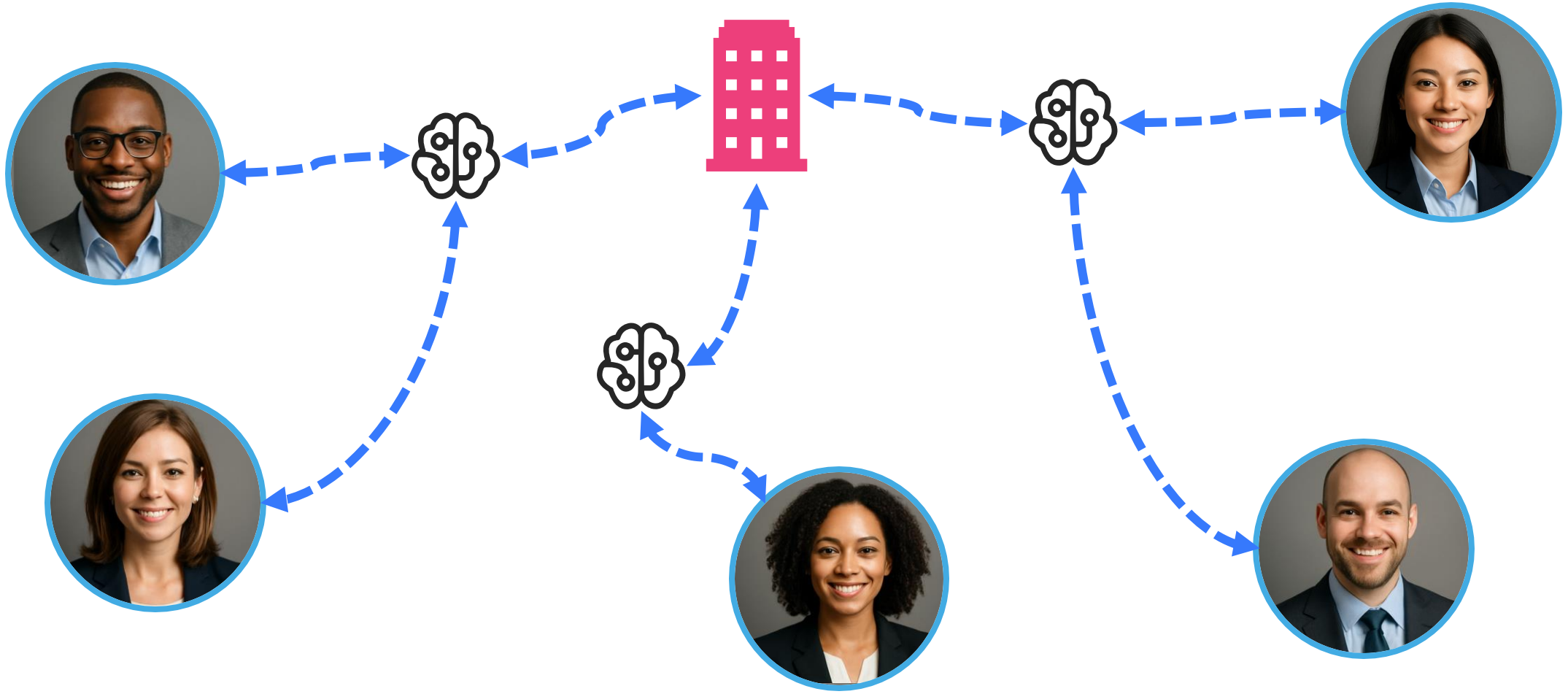
Agents

Expert systems that can work autonomously

Works on behalf of a process or company

There are more agents than people

What are Agents?



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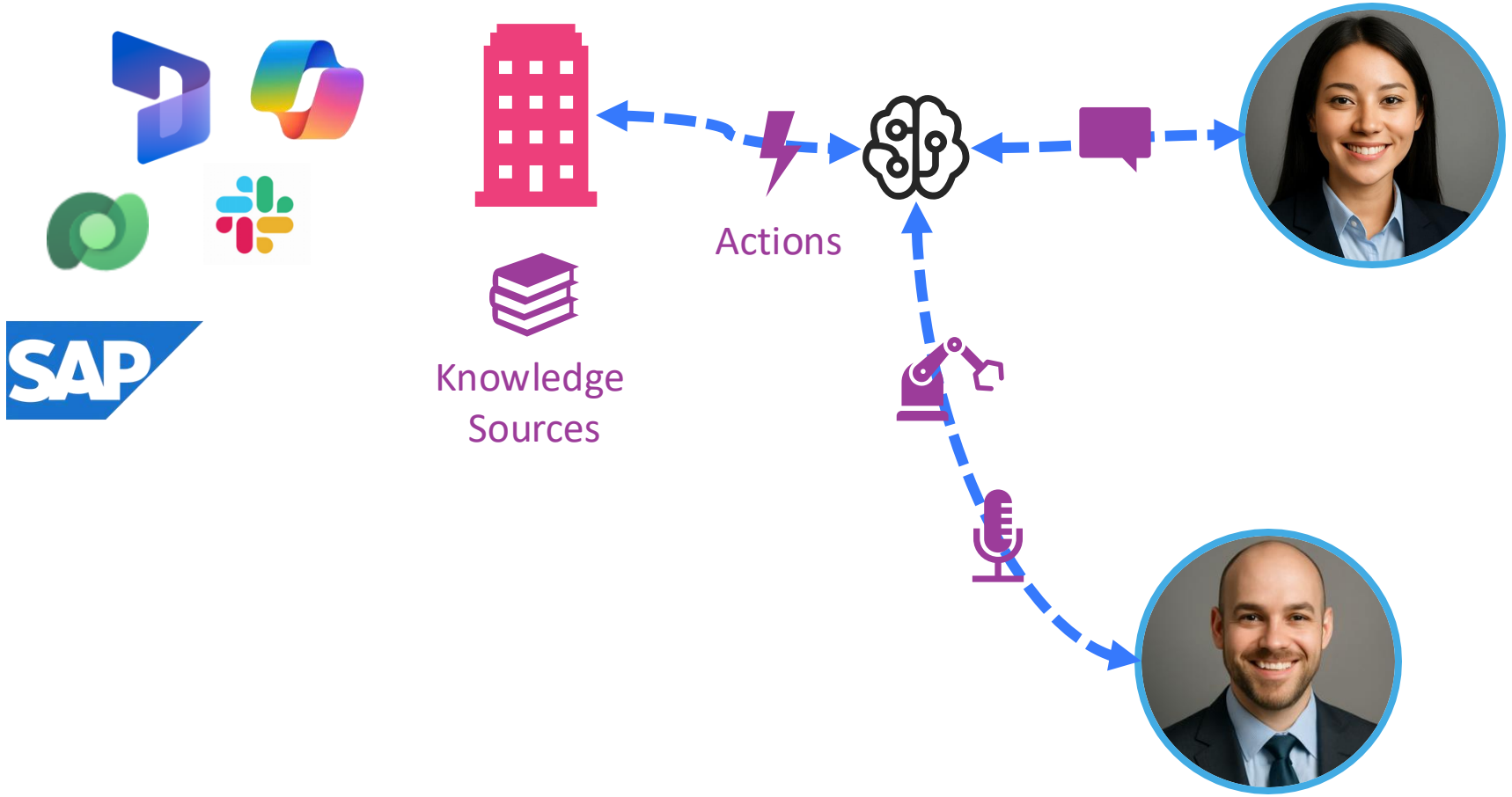

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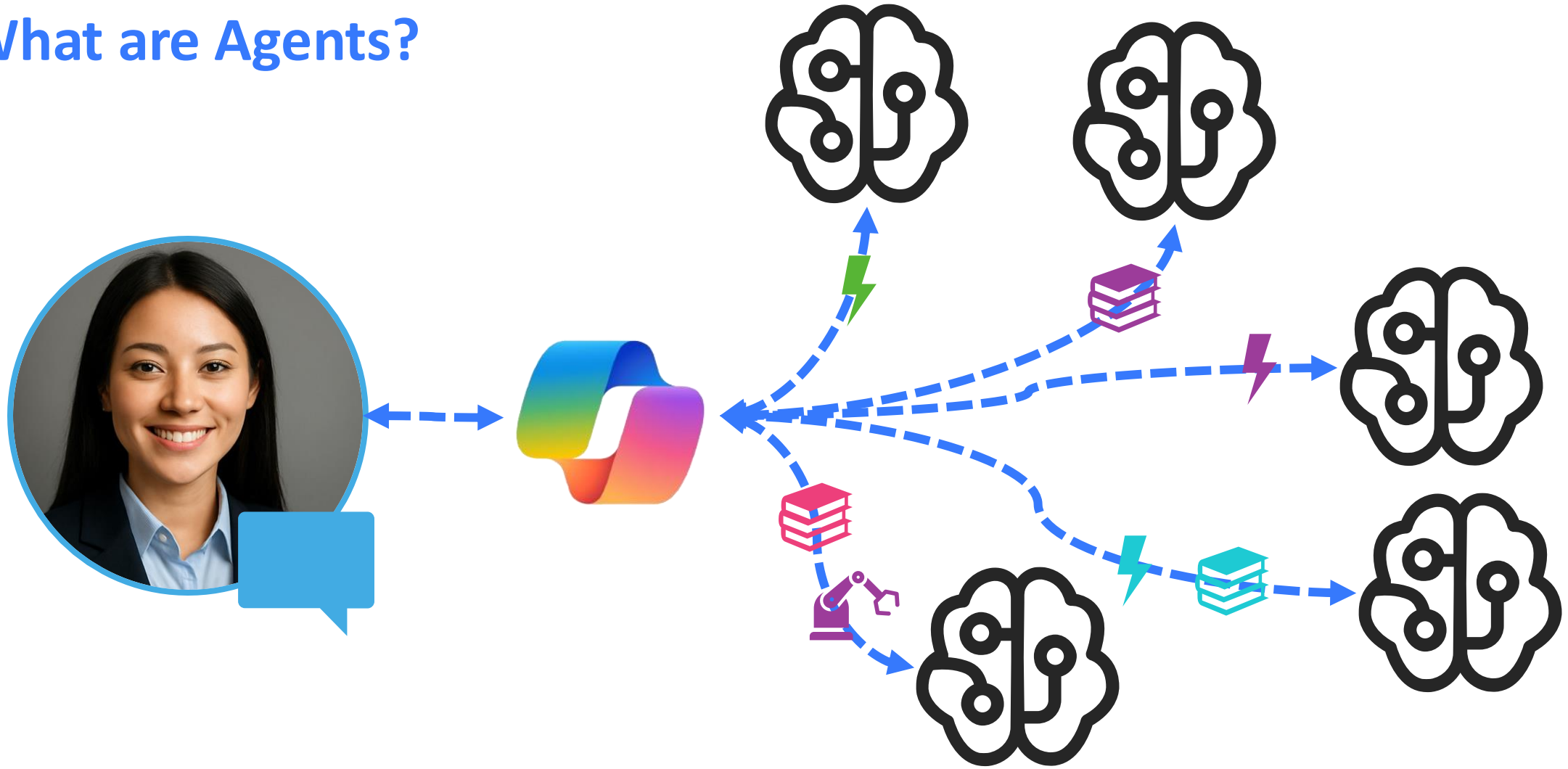
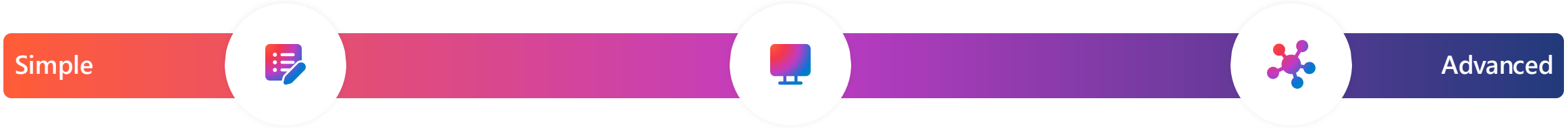


Complexity of Agents



Retrieval

Retrieve information from grounding data, reason, summarize, and answer user questions

Task

Take actions when asked, automate workflows, and replace repetitive tasks for users

Autonomous

Operate independently, dynamically plan, orchestrate other agents, learn and escalate

Use Cases

IT Helpdesk

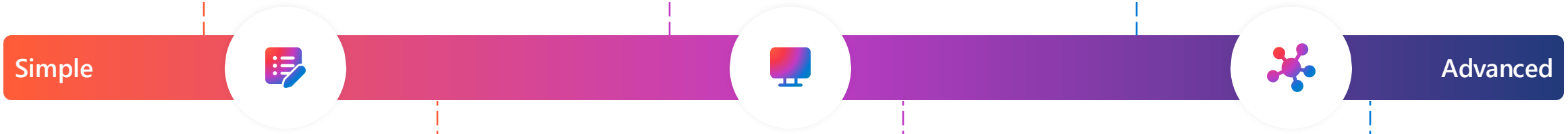
How do I connect to the corporate network?

Device Refresh

Request a new laptop and send approvals via IT Service tool.

Lead Gen

The agent has identified and researched 15 new leads for you to review.



Project Tracker

What is the status of phase 2 for project X and the remaining budget?

Expense Report

Review outstanding open purchase orders and begin financial planning.

Customer Support

The agent identified new support issues and triaged to multi-agents to handle.

Reinvent your business processes

Transform complex and dynamic processes

Reimagine possibilities with multi-agent collaboration

Enable every employee to augment their jobs with agents

What makes a ‘good’ agent?

knows what it **CAN** do …and what it **CAN’T** do

Builds and maintains user trust through consistent behavior

Clear structure = instructions + knowledge + actions

High accessibility and intuitive human-centric design

Handles ambiguity and wrong instructions gracefully

Connect with me

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Productivity Drivers

- Personal and Team Organization
- Straight out of Microsoft Teams
- Standard and Premium Features

- Team Organization with Cost Aspects
- Dynamics 365 and Finance ERP integrated
- Microsoft 1st Party Enterprise Approach

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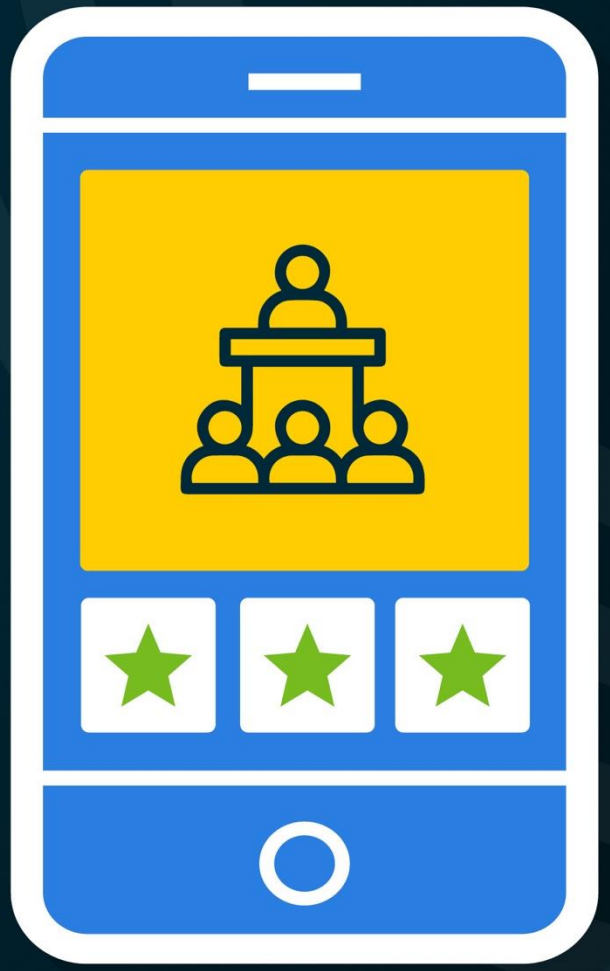

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