



European
Power Platform
Conference

Power Up!

WELCOME
TO

VIENNA 20
25

JOIN THE
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



linkedin.com/in/siebersebastian

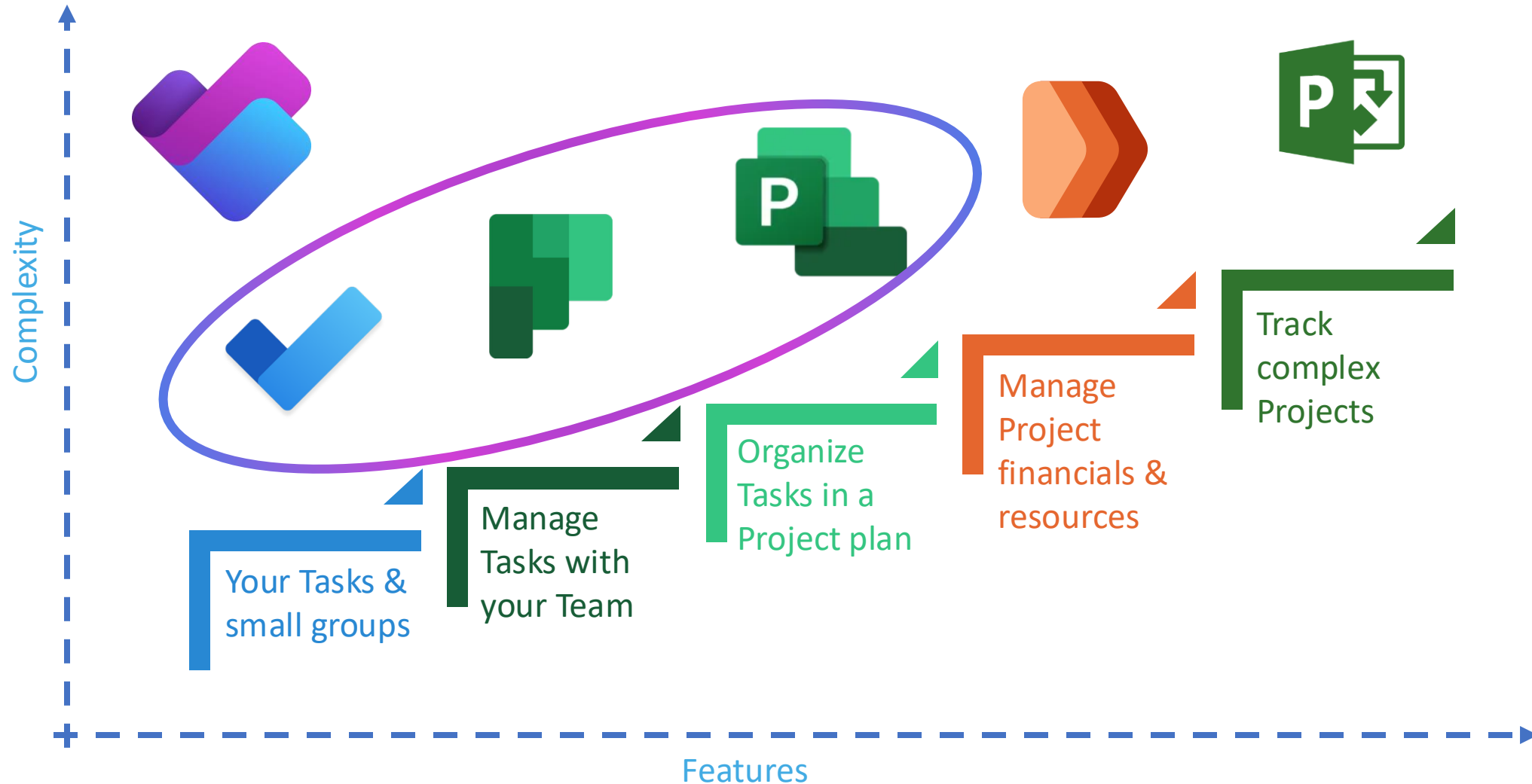


sebastian.sieber@promx.net



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Product Landscape



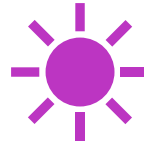
Planner



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 Features


- Summary and
- Goals
- People View
- Sprints
- M365 Copilot
- Task History
- Task conversation
- Advanced deployment


Name ▾		
1	<input type="radio"/>	▾ Review Business Strategy
2	<input type="radio"/>	Identify service/product gaps and opportunities
3	<input type="radio"/>	Complete SWOT analysis
4	<input type="radio"/>	Review business model
5	<input type="radio"/>	Review organizational marketing strategy
6	<input type="radio"/>	Review local marketing strategy
7	<input type="radio"/>	Review global marketing strategy


Premium

- Sales
- Growth
- Product
- Strategy
- Marketing
- Team
- Task
- Task
- Action


**Planner**


 My Day


 My Tasks


 My Plans


Pinned


 Product Launch Plan


 Customer Survey
Sales and Marketing


 Team Sprint Planning
Contoso Team


 My Career Plan


 Marketing Campaign
Sales and Marketing


 Orlando Conference Event
Orlando Conference Event


 New Plan


 Marketing Campaign
































 Add goal


 Gain 15k new customers through Fall marketing campaign


End date

Not started

5 tasks

	Name	Assigned to	Priority	Finish
12	<input type="radio"/> Review product and service margins	 Debra Berger	Medium	2/27/2024
13	<input type="radio"/> Review previous campaign performance	 Adele Vance	Medium	2/28/2024
22	<input type="radio"/> Final shaping and development of ideas	 Alex Wilber	Medium	3/27/2024
23	<input type="radio"/> Research market environment	 Brian Johnson	Medium	4/4/2024
25	<input type="radio"/> Identify campaign targets		Medium	4/17/2024





 Add new task


 Reach at least 2M people with Fall marketing campaign


End date

Not started

4 tasks

	Name	Assigned to	Priority	Finish
6	<input type="radio"/> Review local marketing strategy	 Allan Deyoung	Medium	2/29/2024
7	<input type="radio"/> Review global marketing strategy	 Allan Deyoung	Medium	3/4/2024
9	<input type="radio"/> Establish go-to-markets for organization	 Allan Deyoung	Medium	3/12/2024
11	<input type="radio"/> Evaluate competitive advantages	 Christie Cline	Medium	2/21/2024


 Add new task

 Stay within \$10000 budget for Fall marketing campaign

End date

Not started

4 tasks

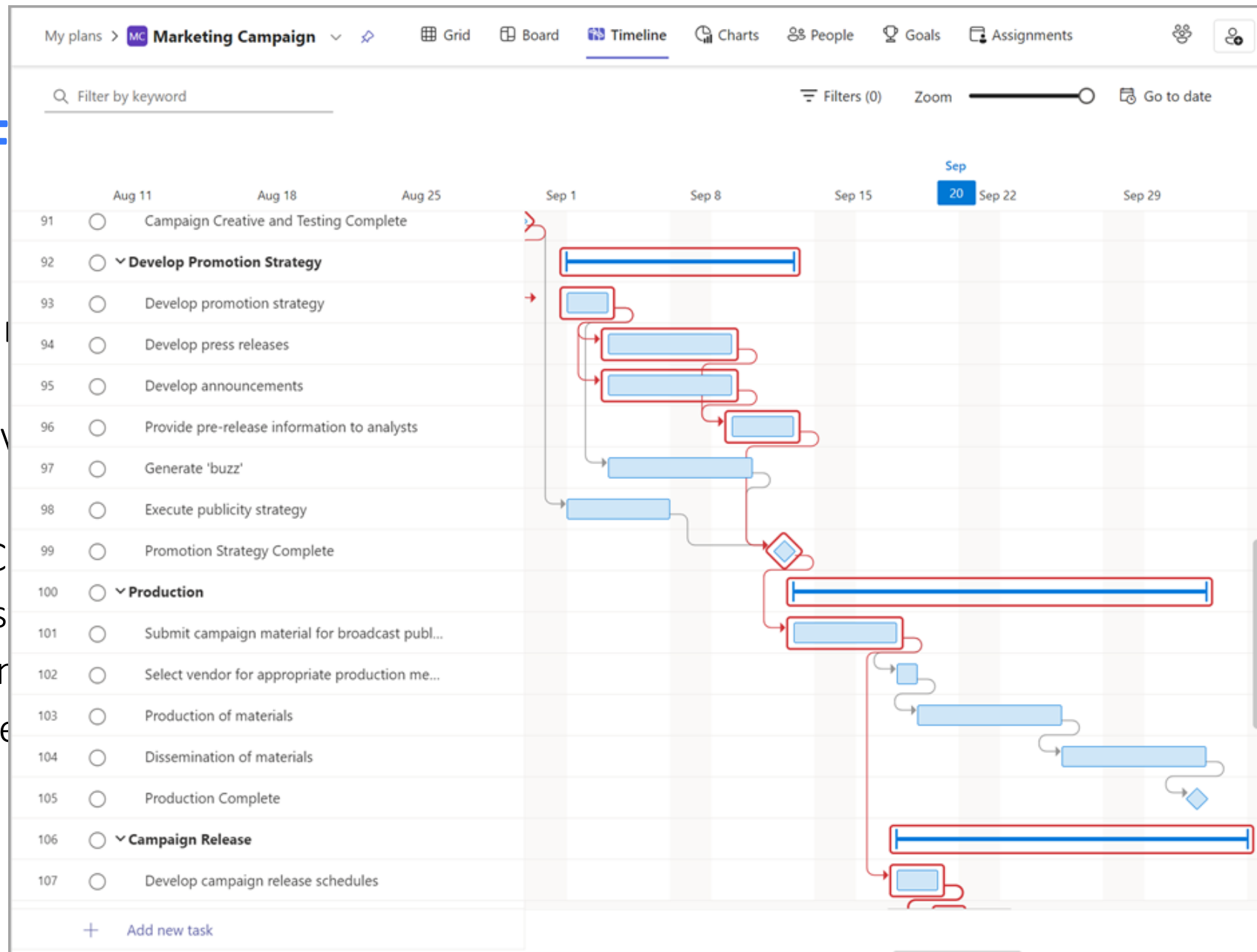
 European Power Platform Conference

VIENNA 2025

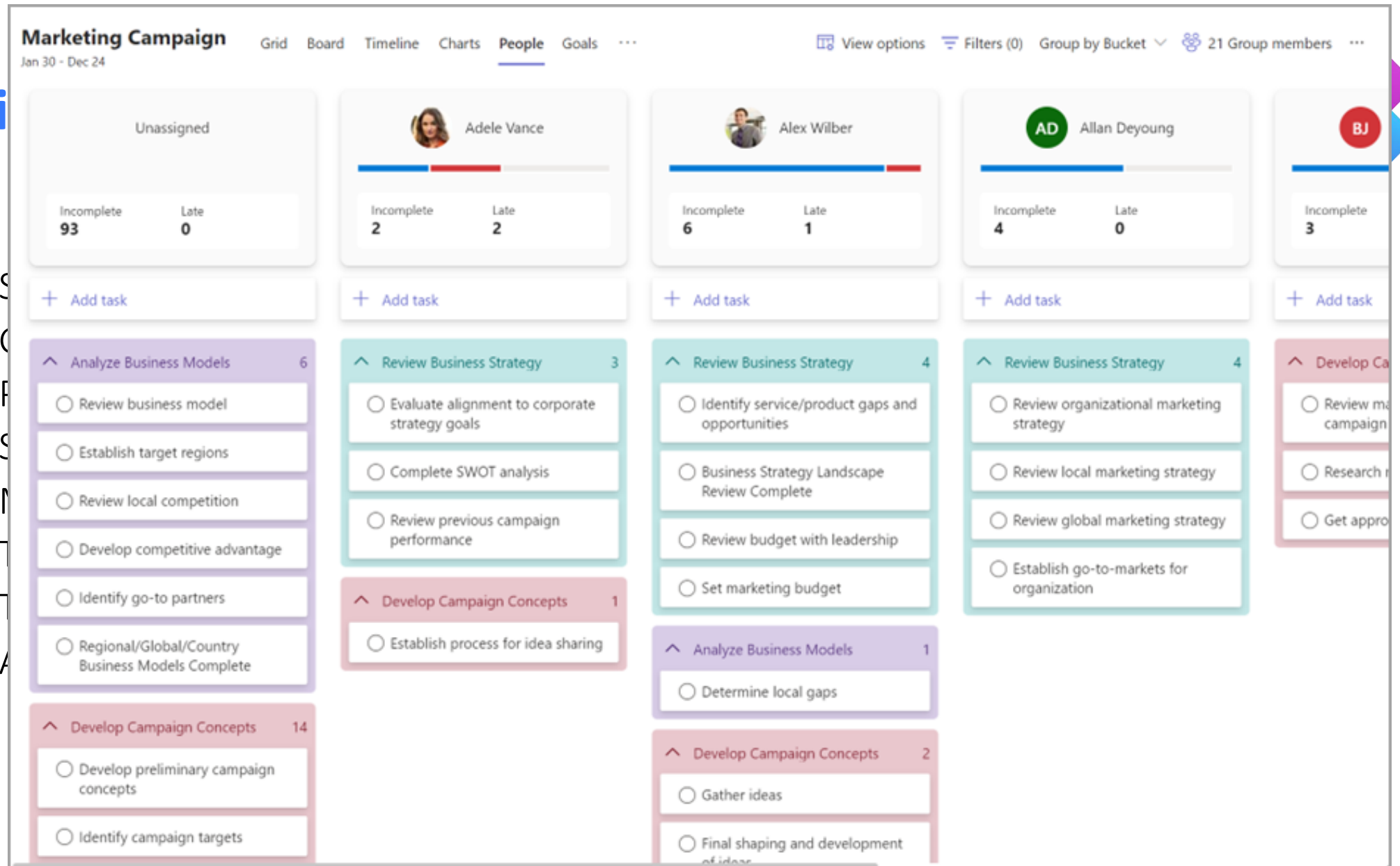
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Premium F

- Summary
- Goals
- People
- Sprints
- M365 C
- Task His
- Task cor
- Advance



Premi



Premium Features

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

The screenshot displays a task card titled "Review Business Strategy" in a light blue header. The main content area is divided into two columns. The left column contains several input fields: "Review business model" (with a circular icon), "Assign to" (with a person icon), "Add label" (with a tag icon), "Add a note..." (with a notepad icon), "Start" (02/15/2024), "Finish" (02/21/2024), "Duration" (4 days), "% Complete" (44%), "Bucket" (Analyze Business Models), "Priority" (Important), and "Sprint" (Sprint 1). The right column is a "Changes" panel with a close button (X). It lists several updates: Adele Vance edited "Sprint" (Sprint 1, Backlog) several minutes ago; Adele Vance removed Alex Wilber from "Assigned to" a month ago; Adele Vance edited "Finish" (10/05/2023, 10/11/2023) several months ago; Grady Archie edited "Bucket" (Analyze Business Models, Review Business Strategy) several months ago; Grady Archie edited "Priority" (Important, Medium) several months ago; and Alex Wilber edited "% Complete" (25%, 0%) several months ago. At the bottom, a "Checklist 0 / 2" is visible.

Review Business Strategy

○ Review business model

Assign to

Add label

Add a note...

Start

02/15/2024

Finish

02/21/2024

Duration

4 days

% Complete

44

Bucket

Analyze Business Models

Priority

! Important

Sprint

Sprint 1

Checklist 0 / 2

Changes

Adele Vance Several minutes ago

Edited Sprint

Sprint 1

Backlog

Adele Vance A month ago

Removed from Assigned to

Alex Wilber

Adele Vance Several months ago

Edited Finish

10/05/2023

10/11/2023

Grady Archie Several months ago

Edited Bucket

Analyze Business Models

Review Business Strategy

Grady Archie Several months ago

Edited Priority

Important

Medium

Alex Wilber Several months ago

Edited % Complete

25%

0%

Adele Vance Several months ago

August 2025

Transition to Planner

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



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



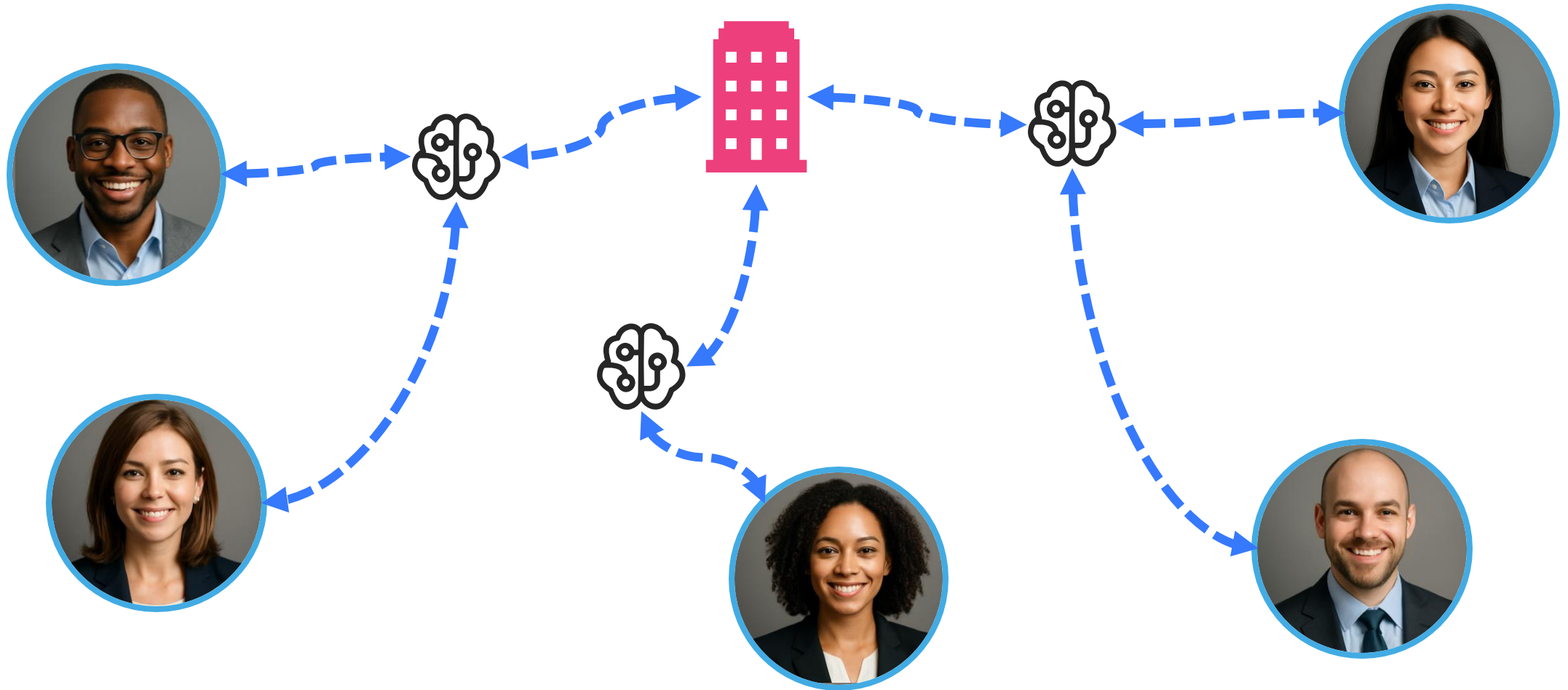
Agents

Expert systems that can work
autonomously

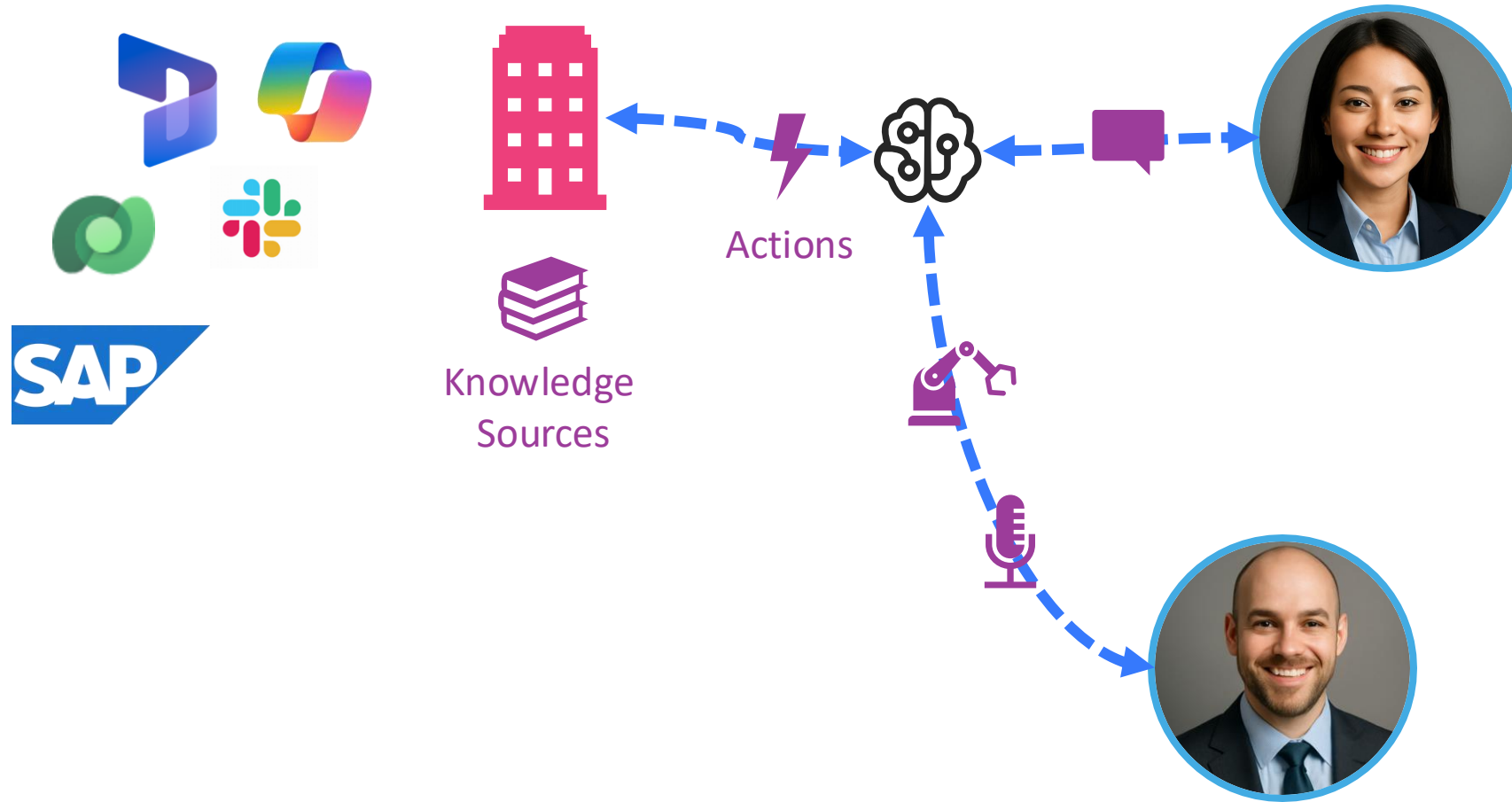
Works on behalf of a process or
company

There are more agents than people

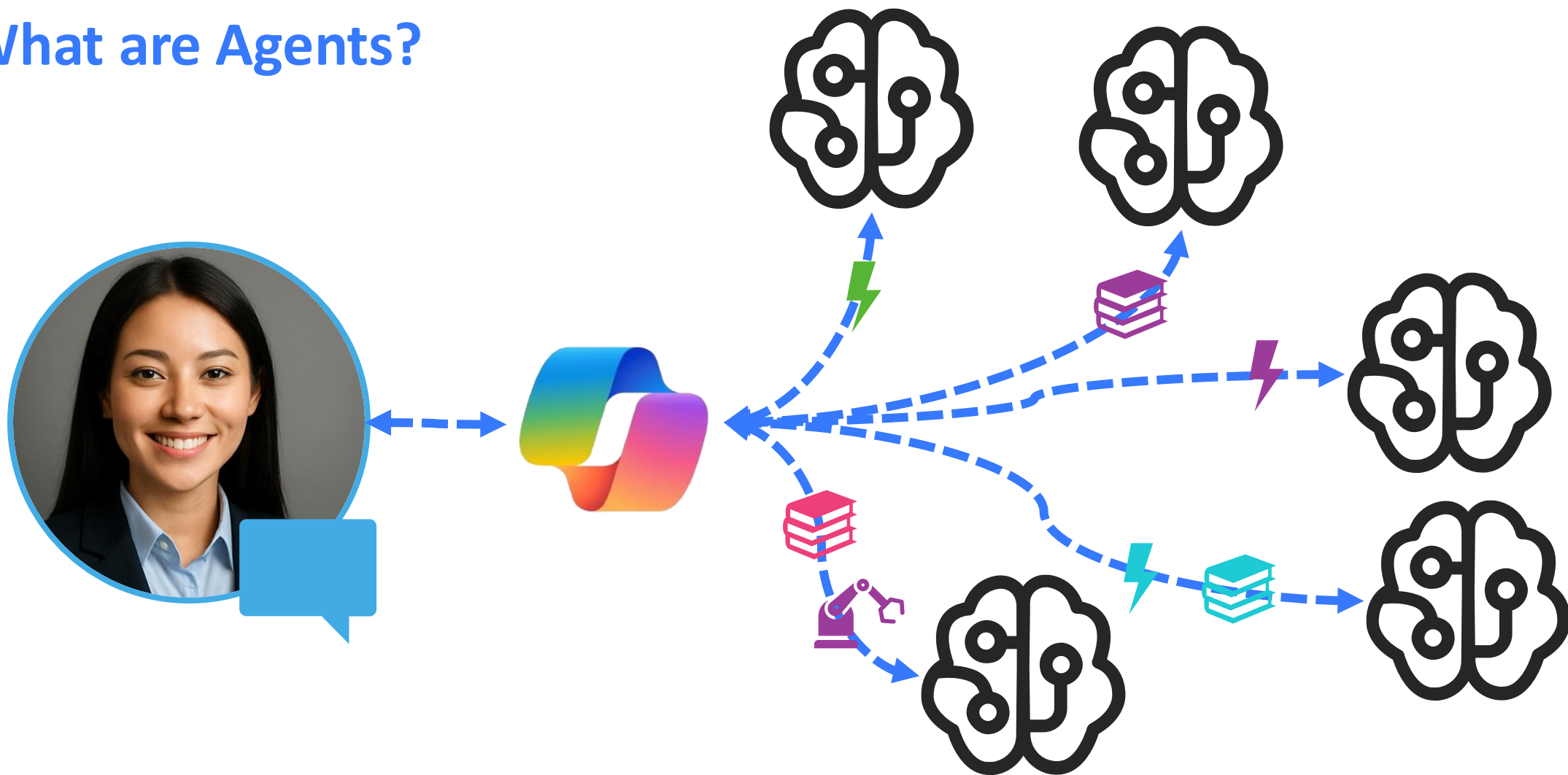
What are Agents?



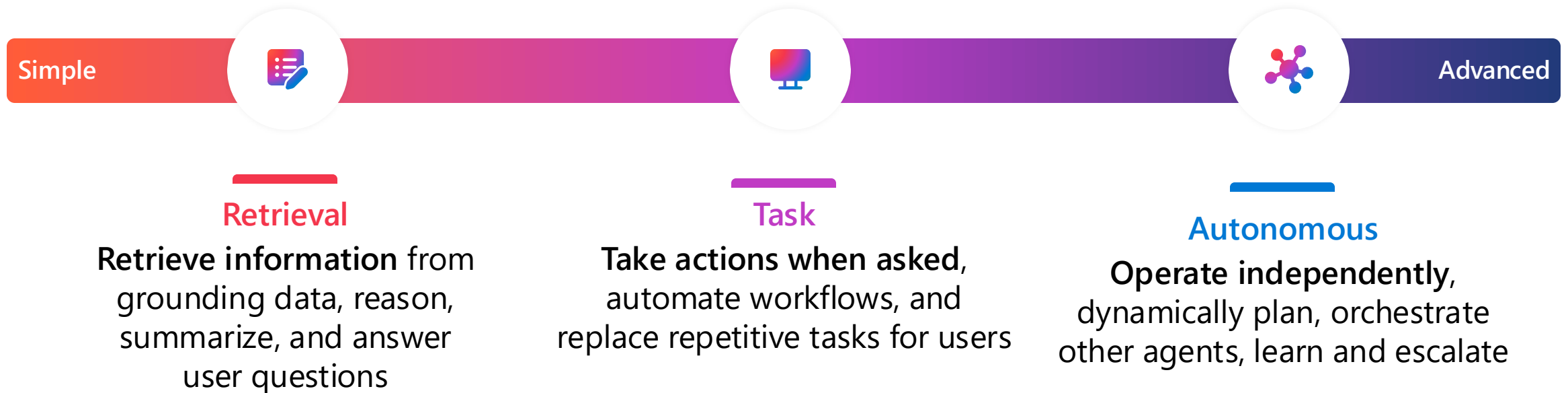
What are Agents?



What are Agents?



Complexity of Agents



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.

Simple



Advanced

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.

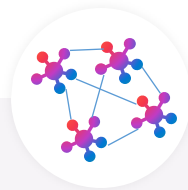
Customer Support

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

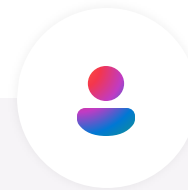
Reinvent your business processes



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



GET IN TOUCH



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Productivity Drivers



Personal and Team
Organization

Straight out of Microsoft
Teams

Standard and Premium
Features



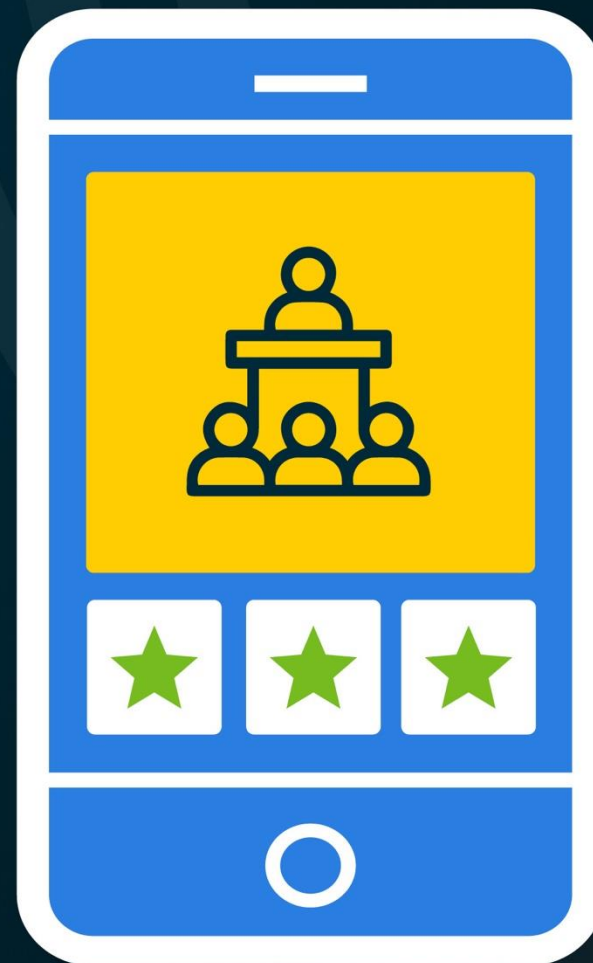
Team Organization with
Cost Aspects

Dynamics 365 and Finance
ERP integrated

Microsoft 1st Party
Enterprise Approach



Please rate
this session
on the app



cvent

