September 2026

# The Next Generation of Microsoft PPM

*Helping you choose the best PPM tools for your business.*

Sensei

Microsoft

# Foreword

At Sensei, we work every day to improve the working world of those around us. Since 2009, we have focused on bringing world leading work, project and portfolio management solutions to our clients to help improve the way they work and enable them to achieve their strategic goals.

Sensei has an exclusive commitment to the Microsoft platform because we choose to partner with the best and bring this value to our clients. If you are looking to implement Microsoft work and project solutions or want to leverage the investment you've already made in Microsoft technology, Sensei is here to work with you, bringing our experience, thought leadership and best practice to your organisation.

The information presented in this guide provides a detailed overview of the range of Microsoft products available to assist with your work, project and portfolio management needs.

Once you've had a look, Sensei is happy to explore which solution could be right for you now and into the future, to ensure your project investments achieve your organisational goals.

LetsChat@sensei.cloud

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## Upgrade to the latest AI-enabled, Microsoft-based project tools.

Project and portfolio management is evolving quickly, with AI moving from experimentation to everyday use. PMOs and project teams now need tools that reduce administration, surface insights and free people to focus on delivery.

With Microsoft Project Online reaching end of life in September 2026, and its on-premises version, Microsoft Project Server Subscription Edition, no longer being updated, now is the right time to explore modern, AI-enabled project management tools built on Microsoft technology.

As an accredited Microsoft Solutions Partner with deep PPM, AI and Microsoft project expertise, Sensei can help you choose the right path forward.

Get in touch for an initial conversation with one of our experts, we'd be happy to share our knowledge and insights to help you make the best decision for your organisation.

# 01 Executive Summary

## Executive Summary of Microsoft's Project and Portfolio Management (PPM) Tools

In today's fast-paced business environment, effective project and portfolio management (PPM) is critical for organisations seeking to achieve their strategic goals. Microsoft offers a diverse range of PPM tools to meet the unique needs of businesses. This whitepaper provides an in-depth exploration of Microsoft's PPM toolkit, to help organisations make informed decisions to select the right tools. Key factors for consideration include identifying organisational needs, methodology compatibility, user proficiency, resource management, alignment with IT strategy, task management and timesheet data capture, change management, governance, AI-enablement, evaluation of implementation partners, and an objective assessment of current capabilities. By addressing these factors systematically, organisations can successfully implement PPM solutions that align with their strategic objectives and operational realities.

1 **Identification of Needs**
The first crucial step in selecting the right PPM tools is identifying your organisation's needs. Determine whether you require tools for collaborative work management, strategic project and portfolio management, or a hybrid solution that combines both.

2 **Methodology Compatibility**
Choose PPM tools that align with your organisation's preferred project methodology, be it Waterfall, Agile, or Hybrid, to ensure successful project management.

3 **User Maturity Levels**
Assess the proficiency of your team members, from professional project managers to informal project managers, to select user-friendly tools that match their expertise levels.

4 **Management of Global Resource Pool**
Efficient resource allocation is crucial. Decide whether you need tools that enable you to manage a unified resource pool across multiple scheduling tools for better resource alignment.

5 **Alignment with IT Strategy**
Ensure that your chosen PPM tools seamlessly integrate with your organisation's IT strategy, especially if it revolves around Microsoft 365 solutions. AI capability is a rapidly growing requirement and should be assessed against your organisation's approach.

6 **Capture of Actuals in Timesheets**
Accurate project tracking relies on meticulous recording of actuals in timesheets. Determine whether your organisation requires tools that support this feature for precise project management.

7 **Implementing Change Management and Governance**
Establish robust change management processes and governance structures to ensure the effective adoption of PPM tools and the achievement of desired outcomes.

8 **Consideration of the Implementation Partner**
The competence of the partner assisting in PPM implementation significantly impacts the success of the initiative. Carefully evaluate potential partners to ensure they possess the expertise and experience required for a successful implementation and on going support.

9 **Objectively Assess Current Capabilities**
To make informed decisions, it's imperative to objectively assess your organisation's current capabilities. This evaluation provides a realistic foundation for the tool selection process, preventing overestimation and unrealistic expectations.

10 **Clearly Outline End Goals and Roadmap Development**
Define your desired outcomes and develop a pragmatic roadmap that bridges the gap between your current state and the envisioned end goals. A clear roadmap ensures that PPM tools are implemented with a strategic perspective in mind.

# Summary of Microsoft's PPM Tools

1

### Project Online (End of life September 30, 2026)

Microsoft Project Online has been 'end of lifed' and is no longer able to be used.

2

### Microsoft Project Server Subscription Edition (PSSE)

Project Server Subscription Edition is Microsoft's legacy on-premises project management platform built on SharePoint Server Subscription Edition. It provides Project Web App for centralised scheduling, resource and capacity planning, portfolio selection, timesheets and OData reporting. Designed for organisations requiring on-premises data, it supports SharePoint and Project permission modes and connects to the Microsoft Project Desktop client. Note, there are no planned updates to this platform on the Microsoft roadmap.

3

### Microsoft Project Desktop

Microsoft Project Desktop is a robust scheduling tool tailored for experienced users requiring precision in managing complex projects. While it excels in task and resource management, it doesn't provide complete Project Portfolio Management (PPM) functionality. It can be challenging for new users due to its complexity but offers advanced project management features and works offline. **MS Project is not end of life and is able to be integrated with some of the enterprise tools described below.**

4

### Microsoft Planner

Microsoft Planner is well known as a task management tool with a user-friendly interface, suitable for lightweight projects. These include simple tasks using Planner Basic, and schedules using the Premium features in planner. While Planner itself is not a full PPM solution, it integrates seamlessly with Microsoft Teams and provides an intuitive experience, making it ideal for informal project managers or those managing tasks or simple projects. When more advanced functionality is needed, you are able to copy your plan up to Planner with Premium features.

5

### Microsoft Planner with Premium features

While Planner is your entry point, it can include premium features. As such it is designed to cater to both professional project managers and those with varying levels of experience. It focuses on scheduling including Gantt charts, baselines, critical path and resource management. It allows basic customisation but lacks certain advanced features required for complex projects. Integration with the Microsoft Power Platform is needed for added functionality. It suits users managing project schedules with resource management and more simple customisation needs, and includes Microsoft Copilot capabilities.

6

### Microsoft DevOps

Microsoft DevOps, also known as Azure DevOps, is geared towards Agile project management, particularly in IT and tech-intensive industries. It offers a suite of development tools for end-to-end software delivery and supports various testing and diagnostics tools. It excels in automation but may be overwhelming for new users and is best suited for Agile projects.

8 **Microsoft Dynamics Project Operations**

Microsoft Dynamics Project Operations is part of the Microsoft Dynamics 365 suite and focuses on client facing project-based services. It offers integration with Microsoft products, real-time insights, and advanced resource management. However, it comes with a steep learning curve, high costs, and challenges in integration outside the Microsoft ecosystem.

9 **Altus**

Altus is a Microsoft Preferred PPM solution that consolidates Microsoft scheduling tools including MS Project Desktop and integrates with other tools like Jira. It offers strategy, portfolio, program and project management with capabilities to use different methodologies for different project management needs. Altus is an AI enabled enterprise level PPM solution that maximises Microsoft investments and provides a consistent user experience for managing all initiatives while aligning and optimising them to organisational strategic outcomes.

## Conclusion

In conclusion, selecting the right PPM tool involves considering your organisation's specific needs, methodology compatibility, user proficiency, resource management, IT strategy alignment, timesheet data capture, change management, and governance. By addressing these factors systematically, organisations can make informed decisions, ensuring the successful implementation of PPM solutions that align with their strategic goals and operational realities. This strategic approach significantly enhances the likelihood of project and portfolio success and ensures that PPM solutions are seamlessly integrated into the fabric of the organisation. This methodology is designed to meet the needs of all stakeholders committed to creating value and improving project delivery in their organisations. **For a thorough understanding, we suggest reading the entire white paper.**

02

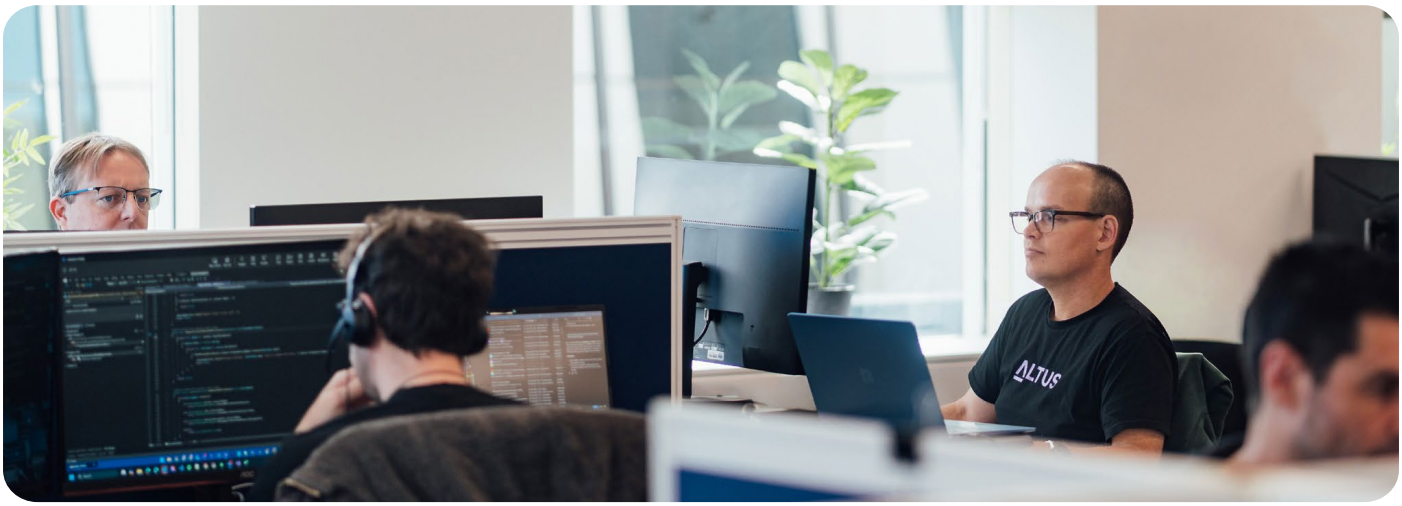
# Introduction

## Purpose and Scope

The Microsoft Project and Portfolio Management (PPM) world can be a little confusing, not the least because many of the tools have similar names and overlapping functionality. In this whitepaper, we'll discuss those tools and help demonstrate what you should know in choosing the best solution for your business.

Microsoft understands that every organisation has a multitude of different project management methodologies (e.g., Agile vs. Waterfall or hybrid) and has a wide range of project management resource maturity. The big picture depends on centralising all work in a single PPM solution. Microsoft has several tools to help with this challenge. Within this white paper we will compare:

- **Microsoft Project Online**
  *end of life September, 2026
- **Microsoft Project Server Subscription Edition (PSSE)**
- **Microsoft Planner**
- **Microsoft Planner with Premium features**
- **Microsoft DevOps**
- **Microsoft Dynamics Project Operations**
- **Altus, a modern Microsoft 365 PPM Solution**




**PPM FULFILLS TWO ELEMENTS OF MANAGING WORK, "DOING THE RIGHT WORK" AND "DOING THE WORK RIGHT".**

## Work Management vs. Project Portfolio Management (PPM)

You will often hear the terms 'PPM Solution' or 'Work Management Solution'. Strategic Portfolio Management (PPM) solutions and Adaptive Work Management solutions serve different yet complementary purposes, addressing the requirements of managing both work and projects.

### *Strategic Portfolio Management*

PPM solutions strategically analyse and manage current or prospective projects. These solutions offer high-level management and strategic alignment of projects, programs, and portfolios, helping align with overall business goals and strategies.

Portfolios and Programs are typically used by portfolio managers, senior executives, and stakeholders involved in strategic decision-making processes surrounding project investments.

### *Adaptive Work Management*

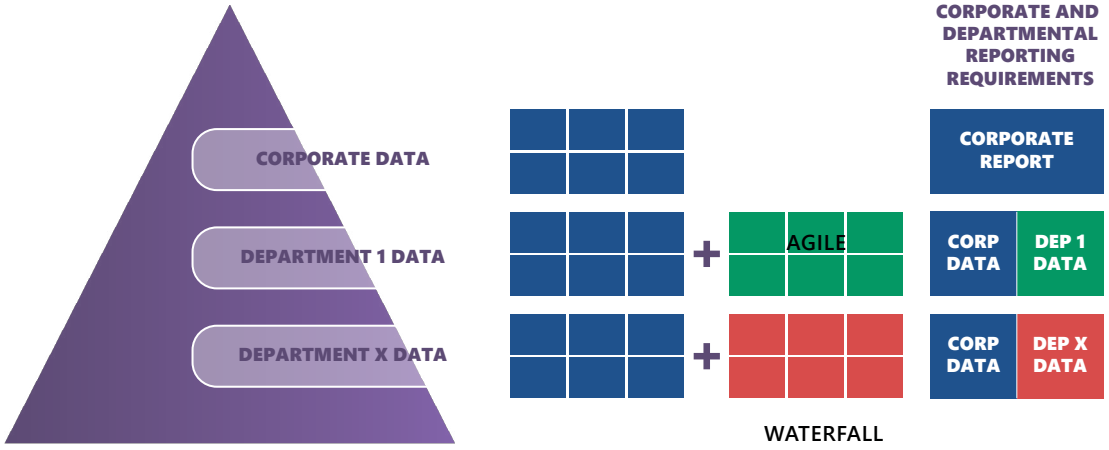
Work Management solutions enhance the productivity and efficiency of individuals and teams by organising tasks, managing resources, and facilitating collaboration. These systems manage daily tasks. Work Management is ideal for team members, project managers, and anyone who needs to organise their daily workload. Work Management emphasises improving individual and team productivity and facilitating the execution of tasks.

Today's modern PPM tools should be able to address both needs - giving project teams the support required to reduce administration and deliver great outcomes, while leaders focus on optimising projects and portfolios to achieve organisational strategic agendas.

## Main functions in a PPM Solution

Data is the magic of a PPM solution, recording the past, present and future (Actual, Forecast, Budget) and giving the insights required for project delivery confidence into the future.

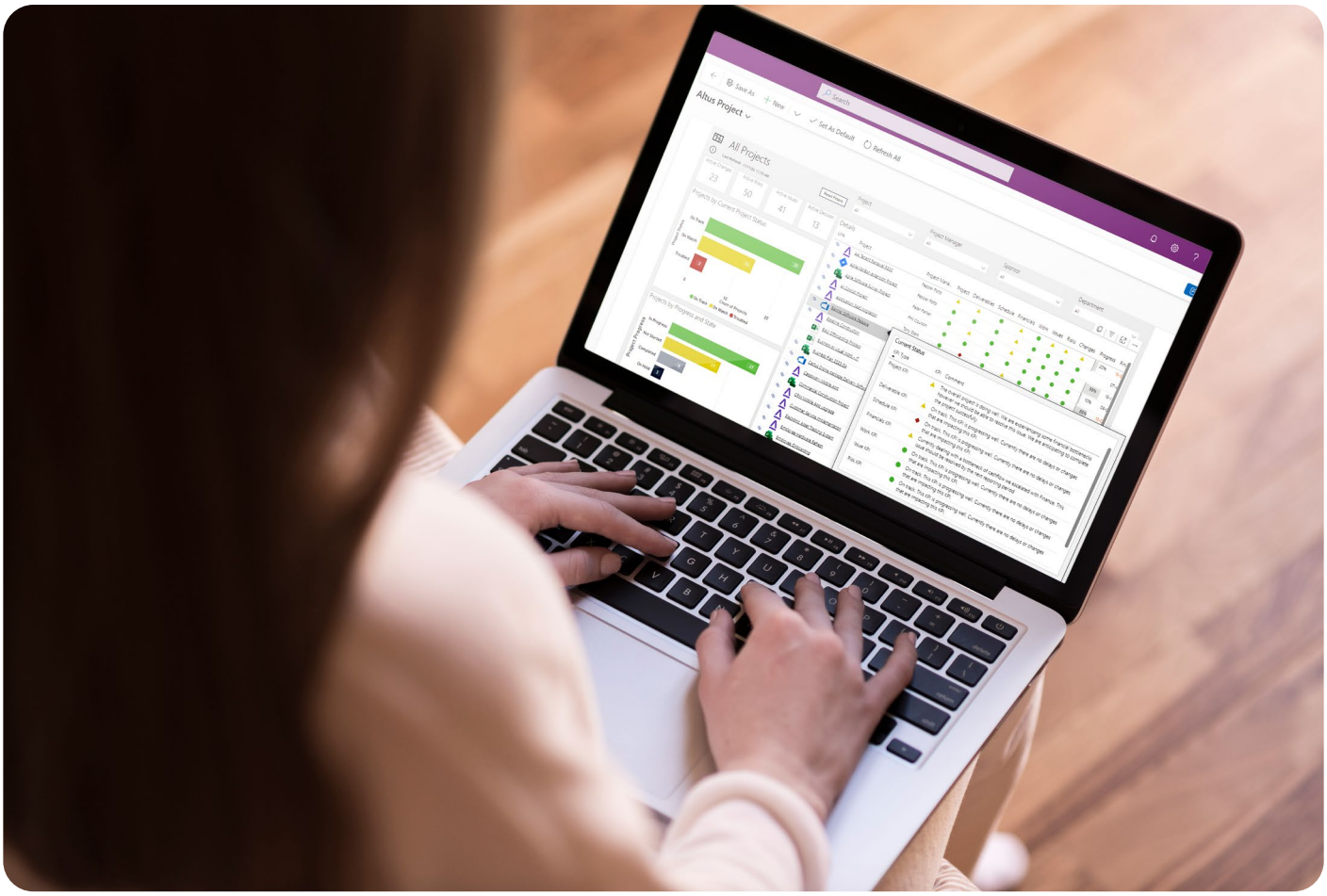
When choosing a solution, understanding what data is required (from corporate and departmental points of view) is essential. The chosen PPM solution must underpin strategic and tactical decisions – but the more data that users manage and maintain, the greater the administrative overhead. Administrative overhead is costly (and unpleasant), so the PPM solution should offer automation and integration with other systems where possible. This supports data consistency and trustworthiness, uplifts compliance and reduces risk. Inbuilt AI-enablement has also become a standard requirement of a PPM solution, lowering administration, surfacing insights and alerts and facilitating faster reporting and decisions.




Industry standards are essential if a PPM solution is to become a core pillar of your organisation. After all, a PPM solution supports strategic goals execution. As such, Microsoft-based PPM and Work Management solutions are compared on base features and functions expected from every PPM solution.

- **Centralised Project Data**: PPM tools provide consolidated views of all project data, making understanding of the overall health and status of each project within a portfolio much easier.
- **Resource Management**: These tools support resource allocation by showing which resources are over- or underutilised, so people and assets are effectively assigned across various projects.
- **Budgeting and Financial Management**: Track the financial performance of projects, from budgeted costs to actual expenditures, thus keeping projects on budget.
- **Schedule Management**: The process of planning, coordinating, and monitoring specific tasks and activities within a project timeline to achieve timely and efficient completion.
- **Risk Management**: PPM tools often include features for identifying, assessing, and managing potential risks across the project portfolio.
- **Strategic Alignment**: By providing a top-down view of all projects, PPM tools ensure each project aligns with the organisational strategic goals.
- **Demand Management and Prioritisation**: These tools prioritise projects based on criteria like strategic alignment, ROI, resource availability, etc., prioritising the most critical projects.
- **Reporting and Analytics**: Advanced analytics and customisable reports provide project performance insights, helping stakeholders make data-driven decisions.

- **Collaboration**: Most PPM tools are equipped with collaboration features, facilitating communication among team members, stakeholders, and executives.
- **Document Management**: Document management is the systematic process of capturing, organising, storing, and retrieving digital and paper documents.
- **Issue Management**: Issue management identifies, tracks, and resolves or addresses challenges and problems arising during the project or operation.
- **Automation of Business Processes**: Reduces administrative overhead and improves governance with digital business processes supporting a consistent and trustworthy work management approach.
- **Artificial Intelligence**: A 'copilot' helping manage all initiatives by reducing administration, surfacing key learnings and standardising processes. (The 'new kid on the block' in PPM.)




## MAKE SURE THE END GOAL IS CLEARLY UNDERSTOOD WHEN SELECTING A PPM TOOL. IS IT STRATEGIC, TACTICAL OR BOTH?

03

# Overview of Microsoft Project Tools

With a general overview of the necessary functions of a PPM solution, let's examine the Microsoft world and the tools available.

## Microsoft Project Online (ended 30 September, 2026).

Project Online was Microsoft's long-standing Enterprise Project Management Solution. Working in collaboration with MS Project Desktop, Project Online was an industry heavyweight. However, Microsoft ceased enhancements from 2019 with the introduction of new low code technology and has now ended the platform.

A big plus of Project Online was its integration with Microsoft's Project Desktop, a tool used by project professionals to produce complex project planning and scheduling. MS Project Desktop is still available but now lacks the accompanying Project Online platform to surface and share its information.

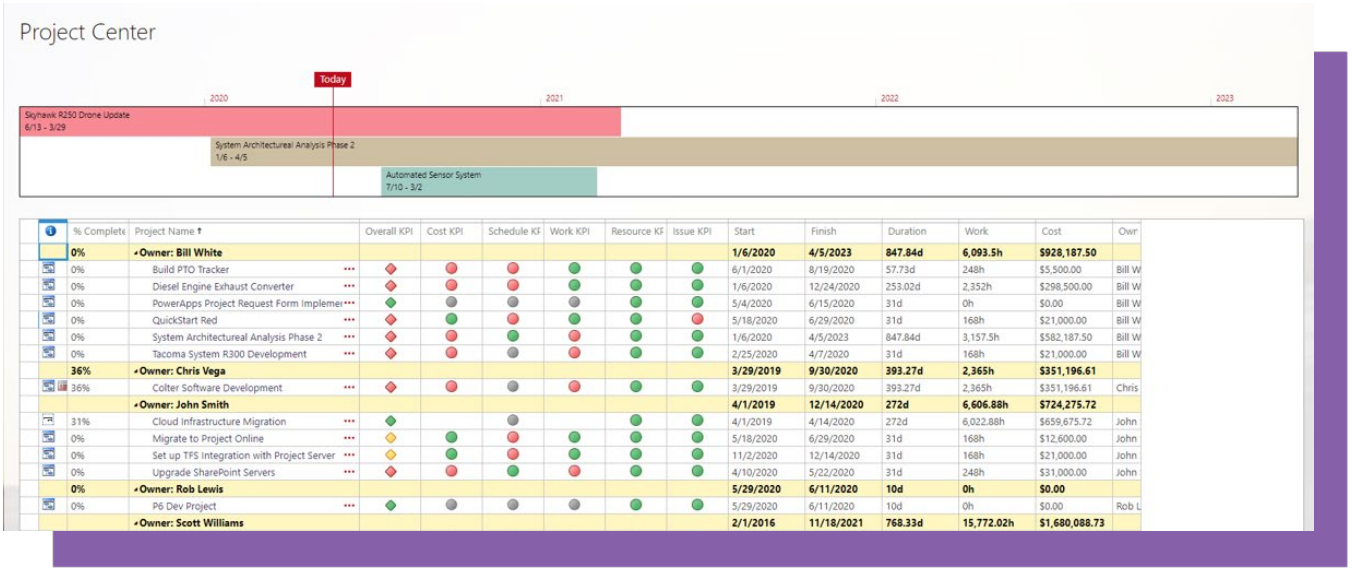
### *Why Project Online is obsolete*

Based on the new Microsoft Power Platform technology, Microsoft Planner with Premium features (formerly Project for the Web) represents a move into the cloud. Microsoft Planner Premium and the Microsoft Power Platform effectively supersede Project Online. The Microsoft Power Platform enables business process digitisation in a low code environment. Essentially, Microsoft no longer purpose-builds a PPM solution, instead providing the basis for building your own.

This is precisely the focus of Microsoft partners like Sensei and Altus. Altus is a leading Microsoft based PPM solution, with native integrations to all Microsoft scheduling tools including MS Project Desktop, Planner and Planner Premium.

# Microsoft Project Server Subscription Edition (PSSE)

Project Server Subscription Edition is Microsoft's legacy on-premises enterprise project and portfolio management platform built on SharePoint Server Subscription Edition. It delivers Project Web App for centralised project scheduling, resource and capacity planning, portfolio selection and timesheets, with reporting via OData. PSSE was built for organisations that needed to keep data on premises, and it supports both SharePoint and Project permission modes along with connectivity to the Microsoft Project Desktop client for detailed scheduling. Project Server was the on-premises predecessor to Project Online.




| % Complete | Project Name | Overall KPI | Cost KPI | Schedule KF | Work KPI | Resource KF | Issue KPI | Start | Finish | Duration | Work | Cost | Owr |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 0% | **Owner: Bill White** | | | | | | | 1/6/2020 | 4/5/2023 | 847.84d | 6,093.5h | $928,187.50 | |
| 0% | Build PTO Tracker | | | | | | | 6/1/2020 | 8/19/2020 | 57.73d | 248h | $5,500.00 | Bill W |
| 0% | Diesel Engine Exhaust Converter | | | | | | | 1/6/2020 | 12/24/2020 | 253.02d | 2,352h | $298,500.00 | Bill W |
| 0% | PowerApps Project Request Form Implemer | | | | | | | 5/4/2020 | 6/15/2020 | 31d | 0h | $0.00 | Bill W |
| 0% | QuickStart Red | | | | | | | 5/18/2020 | 6/29/2020 | 31d | 168h | $21,000.00 | Bill W |
| 0% | System Architectureal Analysis Phase 2 | | | | | | | 1/6/2020 | 4/5/2023 | 847.84d | 3,157.5h | $582,187.50 | Bill W |
| 0% | Tacoma System R300 Development | | | | | | | 2/25/2020 | 4/7/2020 | 31d | 168h | $21,000.00 | Bill W |
| 36% | **Owner: Chris Vega** | | | | | | | 3/29/2019 | 9/30/2020 | 393.27d | 2,365h | $351,196.61 | |
| 36% | Colter Software Development | | | | | | | 3/29/2019 | 9/30/2020 | 393.27d | 2,365h | $351,196.61 | Chris |
| | **Owner: John Smith** | | | | | | | 4/1/2019 | 12/14/2020 | 272d | 6,606.88h | $724,275.72 | |
| 31% | Cloud Infrastructure Migration | | | | | | | 4/1/2019 | 4/14/2020 | 272d | 6,022.88h | $659,675.72 | John |
| 0% | Migrate to Project Online | | | | | | | 5/18/2020 | 6/29/2020 | 31d | 168h | $12,600.00 | John |
| 0% | Set up TFS Integration with Project Server | | | | | | | 11/2/2020 | 12/14/2020 | 31d | 168h | $21,000.00 | John |
| 0% | Upgrade SharePoint Servers | | | | | | | 4/10/2020 | 5/22/2020 | 31d | 248h | $31,000.00 | John |
| 0% | **Owner: Rob Lewis** | | | | | | | 5/29/2020 | 6/11/2020 | 10d | 0h | $0.00 | |
| 0% | P6 Dev Project | | | | | | | 5/29/2020 | 6/11/2020 | 10d | 0h | $0.00 | Rob L |
| | **Owner: Scott Williams** | | | | | | | 2/1/2016 | 11/18/2021 | 768.33d | 15,772.02h | $1,680,088.73 | |

For a small number of organisations, migrating from Project Online back to Project Server Subscription Edition has been a deliberate, short-term choice when they operate at a high maturity in scheduling and resource management. Typical triggers include the need for enterprise level capacity planning and modelling, tightly governed calendars and baselines, sophisticated dependencies and constraints and granular permissions. This path suited companies that already had strong competencies in Project Online (both end users and admins), on-premises server operations and SharePoint maintenance (within internal IT teams). It fits a strategy that does not require business critical PPM applications to be future ready or tightly integrated with the broader Microsoft 365 cloud or have the potential for AI enablement. In return, organisations gain full data residency control, predictable performance tuning at the SQL tier, and lower risk to bespoke integrations that are sensitive to cloud change cadence. The trade-offs are slower innovation, scarcer skillsets, and higher operational overhead, which is why this backward migration only benefits a small percentage of enterprises with the above characteristics.

It's important to note that Microsoft has no planned development for PSSE on its roadmap.

# MICROSOFT PROJECT SERVER SUBSCRIPTION EDITION STRENGTHS AND WEAKNESSES

## Strengths

- On-premises control for data residency, and compliance requirements.
- Enterprise Resource Management and Scheduling in Project Web App, including scheduling, resource and capacity planning, portfolio analysis and timesheets.
- Flexible security models with SharePoint or Project permission modes to suit different governance models.
- Reporting via the Project reporting schema and integration with Power BI using an on-premises data gateway.

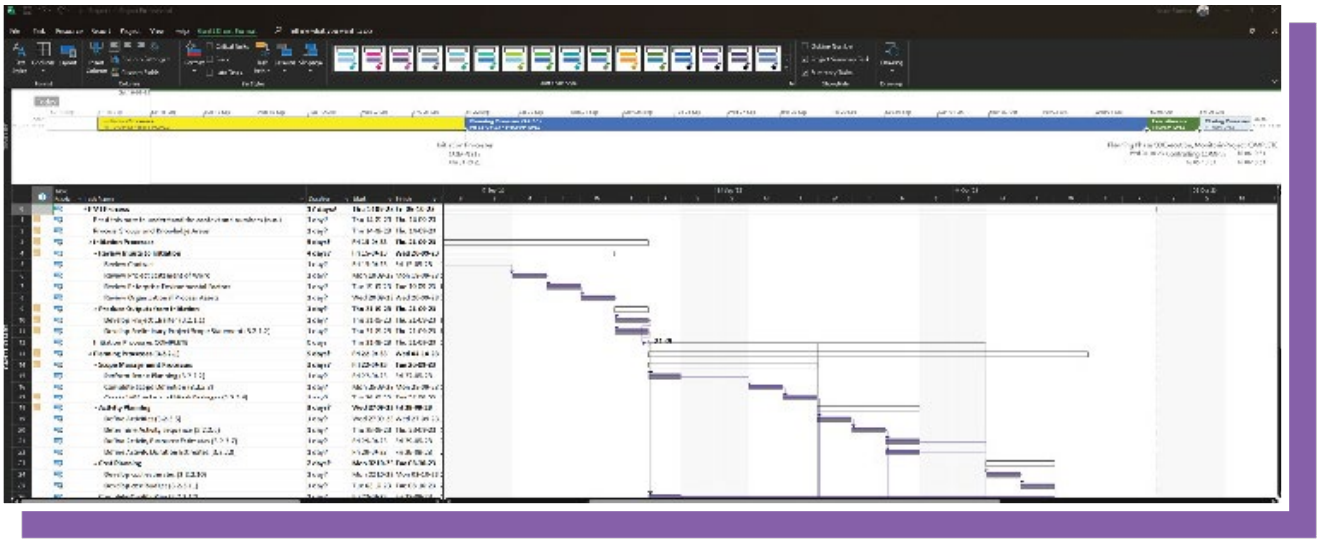
## Weaknesses

- Scarce skillsets across both on-prem SharePoint infrastructure operations and Project Web App configuration, making resourcing and support harder.
- Infrastructure overhead for SQL Server, patching, backups, HA/DR, and performance tuning.
- More complex deployment and upgrades than cloud, with customisations requiring careful lifecycle management.
- Limited integration with modern Microsoft 365 apps and services relative to cloud solutions.
- Legacy user experience compared to newer, more collaborative cloud interfaces.
- Inability to take advantage of future AI enablement or Microsoft Copilot capabilities.
- Microsoft won't make any enhancements to the platform.
- Customer needs to support this themselves including DR and BCP.
- No ability to leverage the capabilities in M365 including Power Apps, Power Automate, etc.
- Lack of Portfolio and Program Management capability.
- Forced to use MS Project for every project schedule.

**MICROSOFT RETIRED PROJECT ONLINE ON 30 SEPTEMBER 2026, DIRECTING CUSTOMERS TO PROJECT SERVER SUBSCRIPTION EDITION, WHICH SHIFTS OPERATIONAL RESPONSIBILITY TO CUSTOMERS BECAUSE IT RUNS ON PREMISES. PSSE HAS NO ANNOUNCED RETIREMENT DATE, BUT GIVEN ITS AGE AND ABSENCE FROM MICROSOFT'S FUTURE ROADMAP, SHOULD BE TREATED AS AN INTERIM OPTION.**

# Microsoft Project Desktop

Outside of Excel, Microsoft Project Desktop is a probably the most popularly used schedule tool. Project Desktop allows management of Tasks, Resource Assignments, cost, time, and effort but it does not manage all project artefacts and has become one of the project manager's most loved or hated tools (depending on the level of scheduling experience).



The Microsoft team has delivered rich scheduling capabilities, including Agile Kanban boards. However, from an organisational perspective one of the great assets of Project Desktop is its combination with Microsoft Project Online, allowing an overview of all projects. This combination has been heavily favoured by professional project managers.

Project Desktop is not impacted by the end of life for Project Online but needs to be integrated with a robust PPM tool to combine, access and surface schedules across organisations.

Altus offers a seamless integration of schedule tools including Project Desktop into a comprehensive Project Portfolio Management Solution.

# MICROSOFT PROJECT DESKTOP STRENGTHS AND WEAKNESSES

## Strengths

- Offers an extensive range of advanced project management features, handling complex projects with a high degree of control and precision over tasks, resources, and schedules.
- Offers detailed and sophisticated scheduling capabilities, comprehensive reporting options, and intricate resource management, catering to the needs of seasoned project managers dealing with multifaceted projects.
- Popular - every Project Manager knows Microsoft Project Desktop.

## Weaknesses

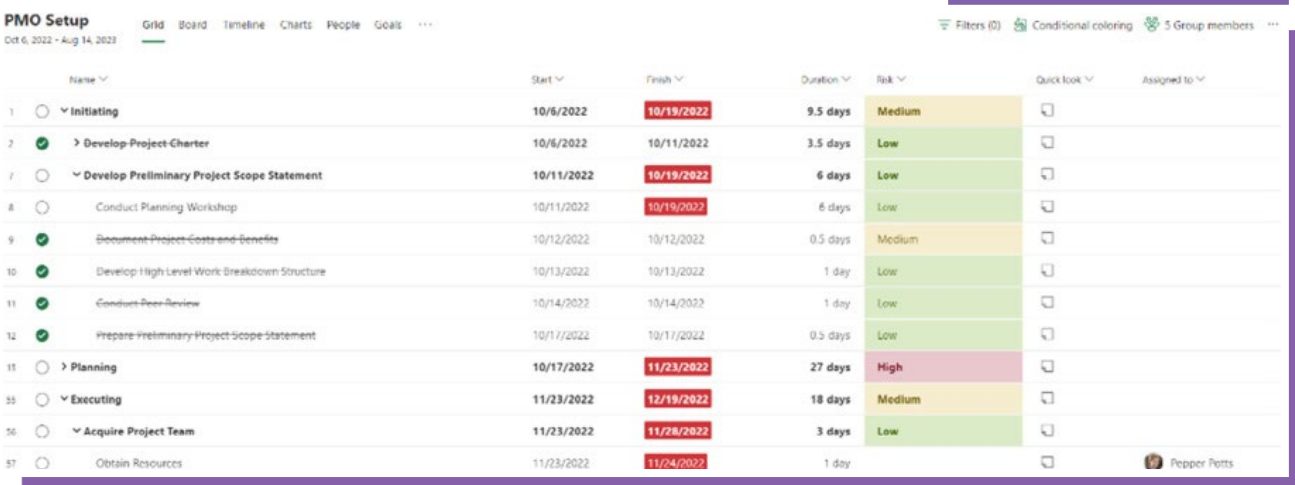
- Steep learning curve with overwhelming complexity and abundance of features.
- Adoption difficult for new or less experienced users.
- As a primarily standalone application, doesn't promote effective real-time collaboration, potentially leaving project update delays.
- Cost a deterrent for smaller organisations or individual users.
- With the end of Project Online, requires integration with a PPM tool to provide full project management capabilities.

**MICROSOFT PROJECT DESKTOP IS THE GRAND DAME OF SCHEDULE TOOLS. SOPHISTICATED, MATURE AND IN THE HANDS OF AN EXPERIENCED USER, IT IS A POWERFUL SCHEDULE TOOL. HOWEVER AS WITH PLANNER WITH PREMIUM FEATURES AND PLANNER, IT IS A SCHEDULE TOOL ONLY, NOT A PROJECT PORTFOLIO SOLUTION. MICROSOFT HAS CONFIRMED THAT PROJECT DESKTOP IS HERE TO STAY.**

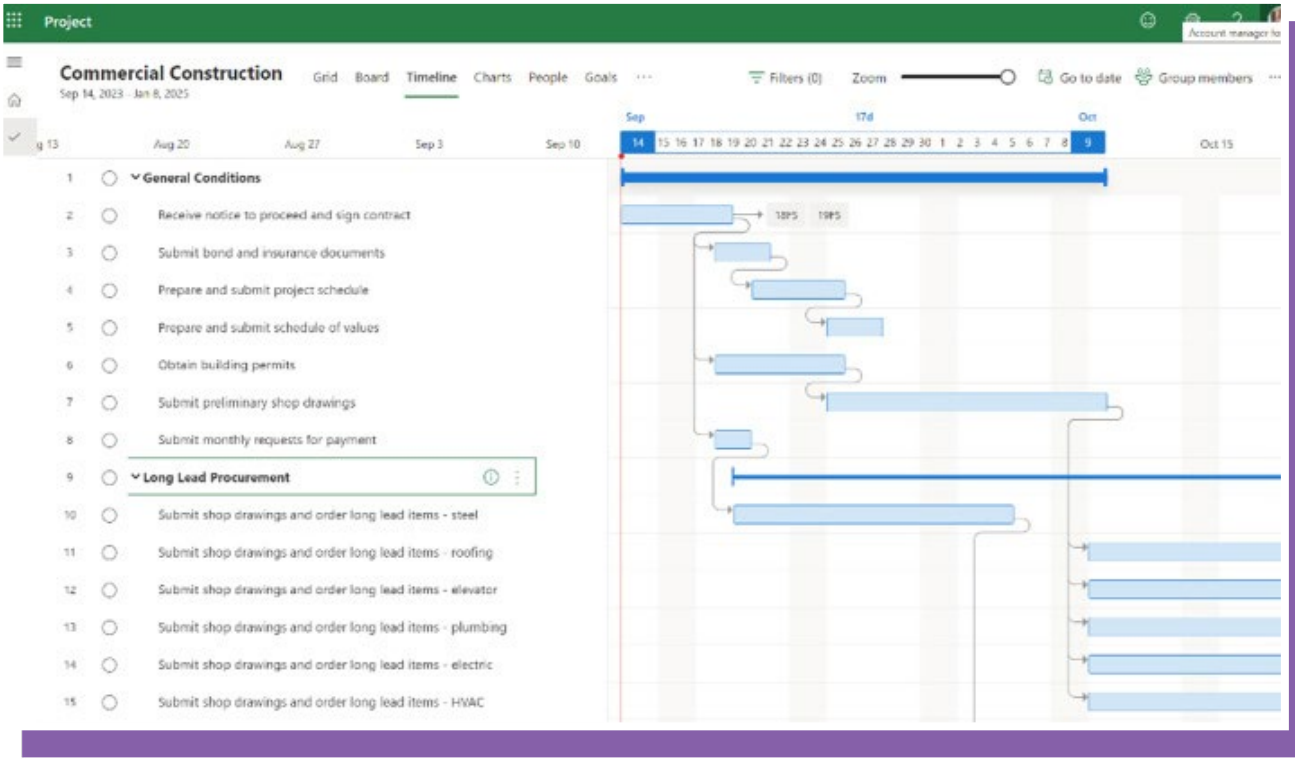
# Microsoft Planner with Premium Features

The new Microsoft Planner Premium, introduced in 2024, is a single, unified, collaborative work management experience. Built on the Microsoft Power Platform, it brings together the simplicity of Microsoft To Do, the collaboration of Planner, the power of Microsoft Project for the web, and the intelligence of Microsoft Copilot into a single, simple solution that spans individual task management to professional project management needs. It provides an intuitive, easy to understand schedule tool which seamlessly works with Microsoft Teams. It is ideal for straightforward project and task management.

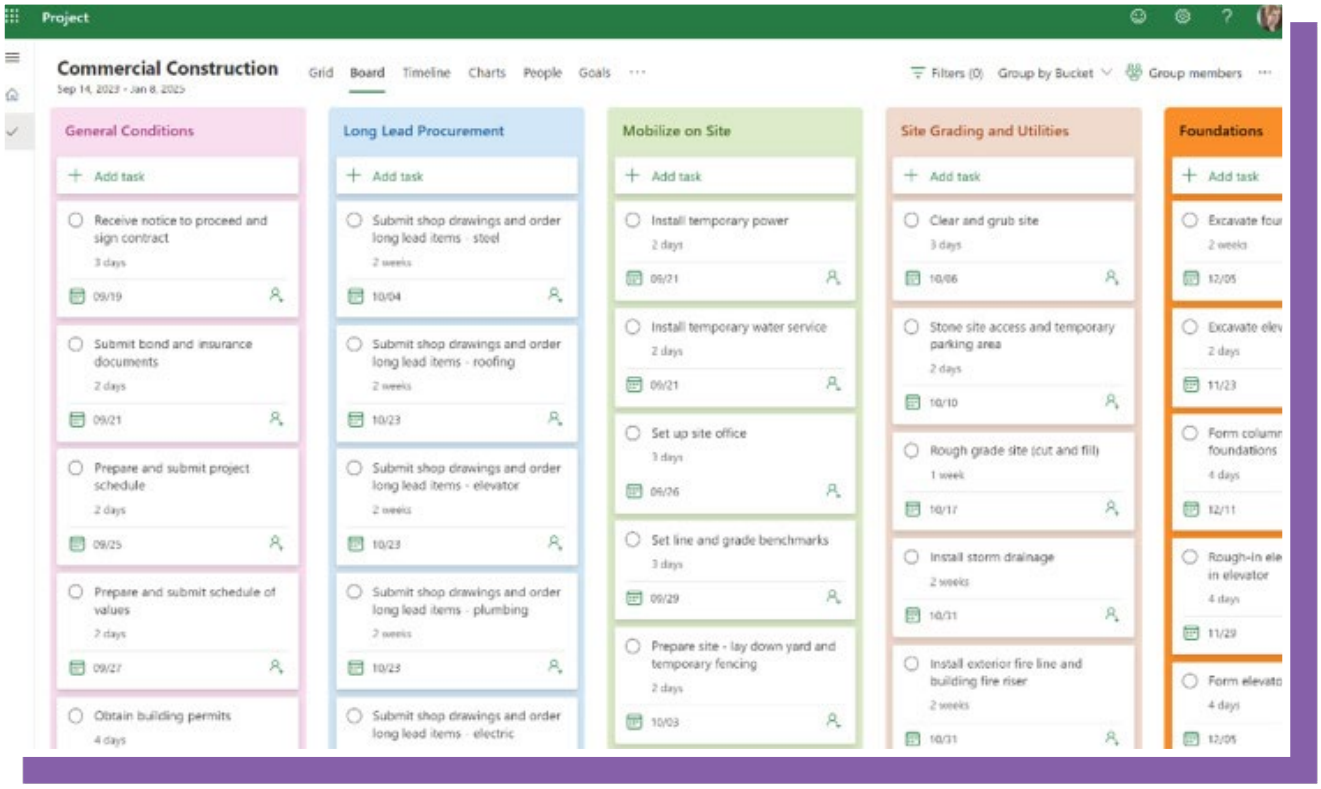
**Grid View**




**Gantt Chart view**



**Board view**


Project
Commercial Construction
Grid
Board
Timeline
Charts
People
Goals
Filters (0)
Group by Bucket
Group members
General Conditions
Add task
Receive notice to proceed and sign contract
3 days
09/19
Submit bond and insurance documents
2 days
09/21
Prepare and submit project schedule
2 days
09/25
Prepare and submit schedule of values
2 days
09/27
Obtain building permits
4 days
Long Lead Procurement
Add task
Submit shop drawings and order long lead items - steel
2 weeks
10/04
Submit shop drawings and order long lead items - roofing
2 weeks
10/23
Submit shop drawings and order long lead items - elevator
2 weeks
10/23
Submit shop drawings and order long lead items - plumbing
2 weeks
10/23
Submit shop drawings and order long lead items - electric
Mobilize on Site
Add task
Install temporary power
2 days
09/21
Install temporary water service
2 days
09/21
Set up site office
3 days
09/26
Set line and grade benchmarks
3 days
09/29
Prepare site - lay down yard and temporary fencing
2 days
10/03
Site Grading and Utilities
Add task
Clear and grub site
3 days
10/06
Stone site access and temporary parking area
2 days
10/10
Rough grade site (cut and fill)
1 week
10/17
Install storm drainage
2 weeks
10/31
Install exterior fire line and building fire riser
2 weeks
10/31
Foundations
Add task
Excavate four
2 weeks
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## PLANNER WITH PREMIUM FEATURES STRENGTHS AND WEAKNESSES

### Strengths

- User-friendly, intuitive interface, allowing rapid adoption and efficient project management (ideal for those unfamiliar with project management software).
- Seamless Microsoft 365 integration for enhanced collaboration (Microsoft Teams) and Microsoft Copilot AI functionality embedded into the out of the box experience.
- Cloud architecture for real-time updates and anywhere access.
- Data is stored in Microsoft Dataverse, the database for Microsoft PowerApps. This makes Planner with Premium features extensible and reportable in tools like Power BI and Excel.

### Weaknesses

- Limited functionality compared to Microsoft Project Desktop, especially in terms of advanced project scheduling, amount of tasks, (these are being improved by Microsoft), reporting.
- Missing features like User Defined Templates - may not meet the needs of users managing complex projects.
- Absence of advanced features and customisation may require more sophisticated project management solutions.
- Currently there are no cost and budget management capabilities and it's limited to a single schedule baseline.

**PLANNER WITH PREMIUM FEATURES IS LARGELY A MODERN SCHEDULINGE TOOL WITH LIGHT-WEIGHT END-TO-END PROJECT PORTFOLIO AND RESOURCE MANAGEMENT CAPABILITIES.
IF MANAGING PROJECT SCHEDULES AND FIELDS ONLY IN COMBINATION WITH RESOURCE MANAGEMENT AND SIMPLE CUSTOMISATION, PLANNER PREMIUM IS FOR YOU.**

# Microsoft Planner*

Microsoft Planner is a low-maturity task management tool enabling any team to manage all types of tasks including lightweight projects in an intuitive Kanban style.

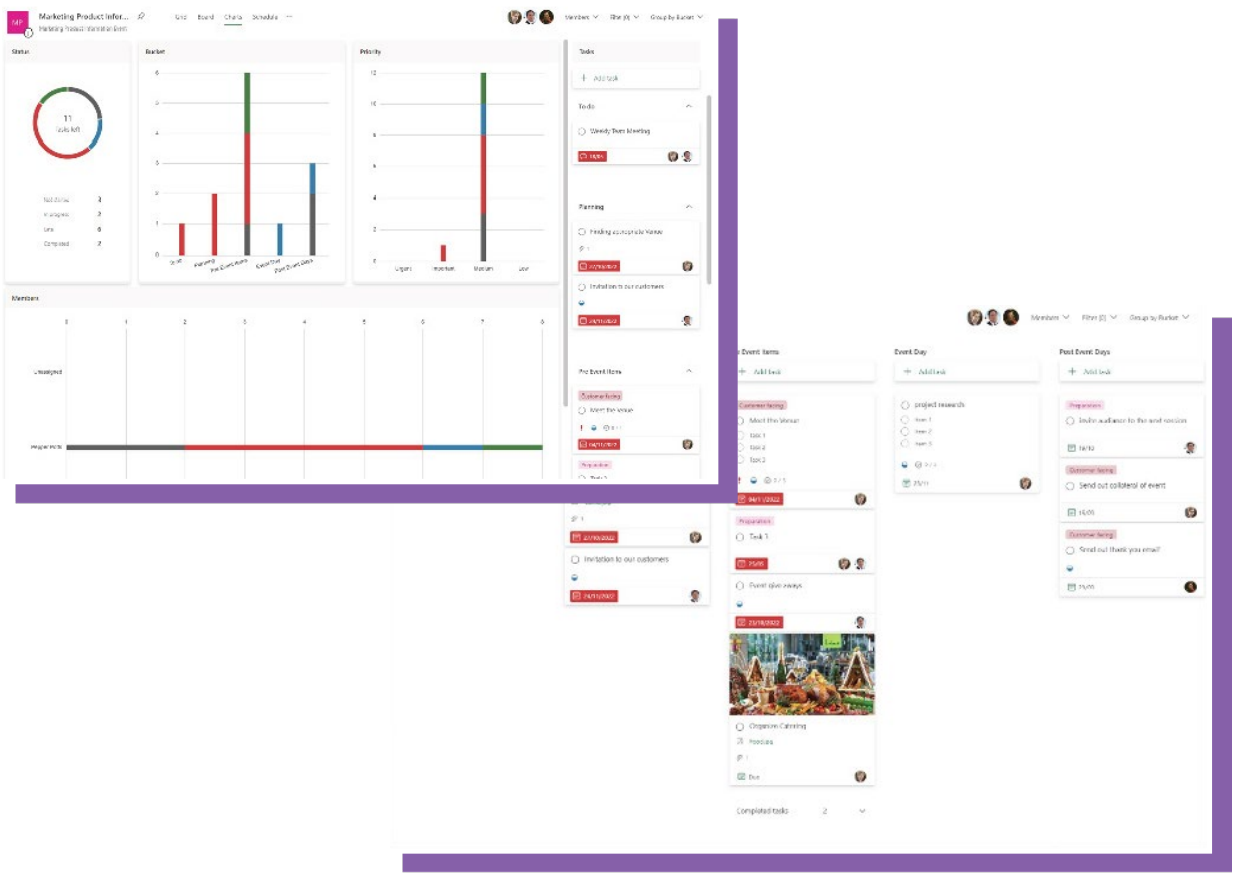
The user experience is exactly what non-project managers require. Functions include creating and assigning tasks, outlining start and due dates, attaching documents, collaborating with the project team and an overall view of the current progress in terms of tasks.

Projects can start in Planner and (where more sophisticated scheduling is required) convert into Planner with Premium features without re-keying data (license implications apply).

Additionally, Planner easily integrates with Microsoft Teams for collaboration and document management.

Planner is not a PPM solution, but a task management tool suitable for simple projects or group activities.

*Planner now also includes the option of Planner with Premium features, previously known as Project for the Web. This provides a single-entry point to different types of work management. See Summary for more details.



# PLANNER STRENGTHS AND WEAKNESSES

## Strengths

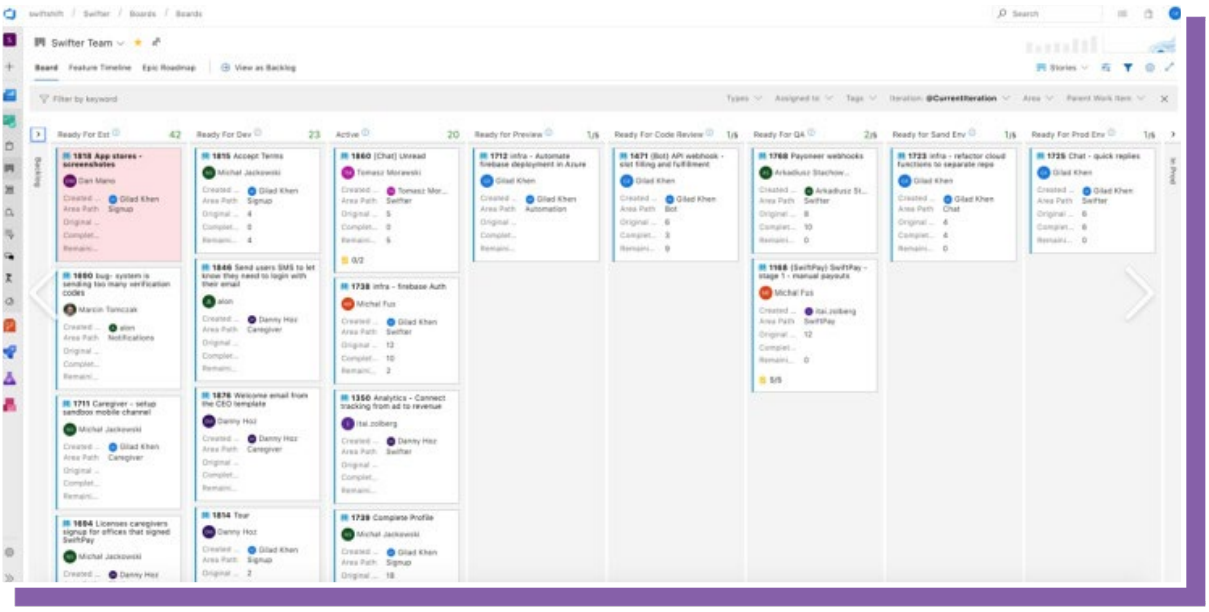
- Intuitive user-friendly interface, creating and managing tasks is easy for non-technical team members with differing backgrounds.
- Fully integrated with Microsoft 365 and applications including Outlook, Teams, and SharePoint, for enhanced collaboration and communication.
- Visual organisation tools (Boards and Buckets) for easy task categorisation and prioritisation. Quick overviews of ongoing projects and their progress.
- Emphasises collaboration. Multiple team members can coauthor documents, leave comments, and assign tasks, fostering cooperation.
- Automatic notifications keep team members informed of assignments, due dates, and updates promptly.
- Cloud architecture for anywhere, any device access.
- Free with Microsoft 365.

## Weaknesses

- Lacks advanced features such as detailed project scheduling, time tracking, and in-depth reporting.
- Unsuitable for large-scale or complex projects. Consolidated reporting not easy (for multiple projects).
- Limited customisation and reporting options.
- No features for managing task dependencies (essential for projects where tasks must finish in sequence).
- No built-in time-tracking limits teams monitoring time spent on individual tasks or projects.

# Microsoft DevOps

Microsoft DevOps is Microsoft's answer to Agile Project Management, especially useful to IT departments and technology-heavy industries. Now commonly referred to as Azure DevOps, Microsoft DevOps is a suite of development tools facilitating end-to-end software delivery. It integrates with popular code repositories, provides build and release pipelines for continuous integration and deployment, and features Agile planning tools for tracking work, backlogs, and sprints. Additionally, Azure DevOps supports multiple testing and diagnostics tools, ensuring software quality while promoting collaborative development.




DevOps is not suited to waterfall projects. It is a powerful development and scrum master management tool focused on the Agile methodology.

With Agile a popular methodology for IT project management, DevOps has become highly popular, offering SAFe[1] digitisation which is a preferred way of managing Agile Projects, Portfolios, and enterprise business agility.

1 https://scaledagileframework.com/

# DEVOPS STRENGTHS AND WEAKNESSES

## Strengths

- Provides comprehensive development tools, services, and features covering the full application lifecycle, including planning, development, testing, and deployment.
- Offers extensive integration capabilities with Microsoft products, third-party tools, and services, allowing creation of tailored DevOps environments aligned with specific needs and preferences.
- Scales efficiently, catering to small development teams and large enterprises.
- Flexibility accommodates projects of varying sizes and complexities.
- Supports automation across the software development lifecycle, accelerating delivery cycles.
- Fosters collaboration and enhances communication among development and operations teams through Azure Boards and
- Azure Repos, supporting Agile planning and version control.
- Robust security and compliance for safety and code integrity.
- Provides continuous monitoring and feedback tools, for prompt issue detection and resolution.

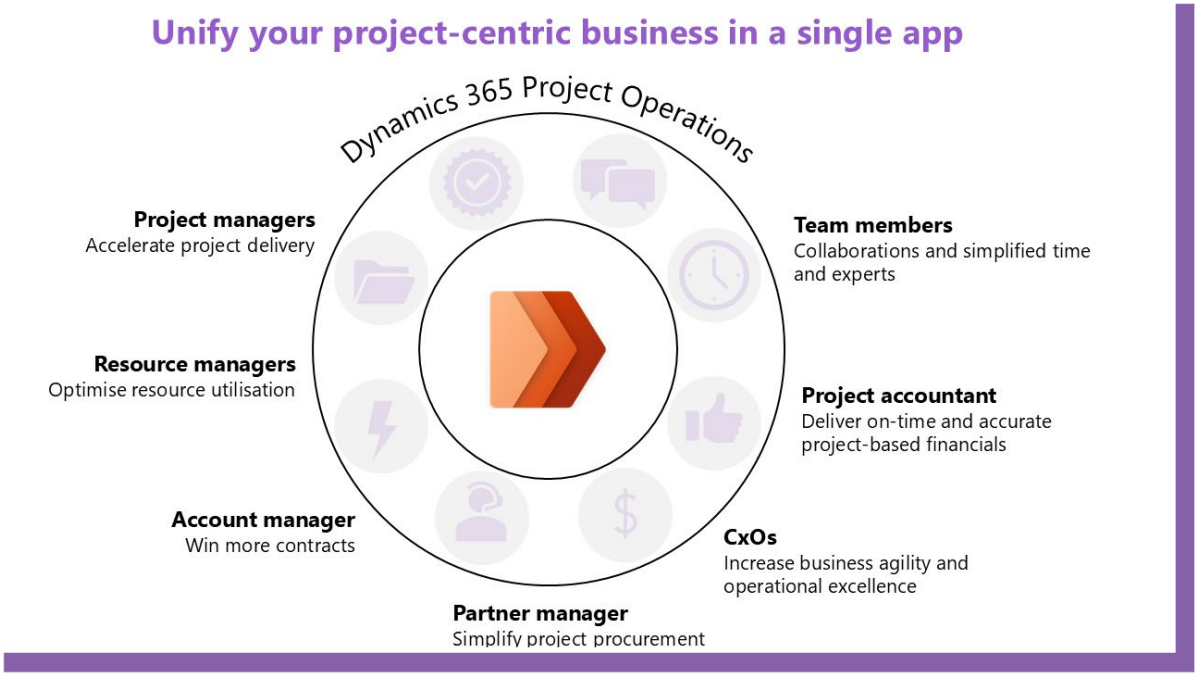
## Weaknesses

- Suitable for Agile only (not waterfall).
- Potentially complex and overwhelming for new or less experienced users - steep learning curve.
- Cost. Expensive/out of reach for smaller teams or projects with limited budgets.
- Customisation and extensibility options potentially limited.
- Functional but limited user interface.
- Deploying applications can be cumbersome and error-prone, particularly in large and complex projects.
- Difficult integration with non-Microsoft products.

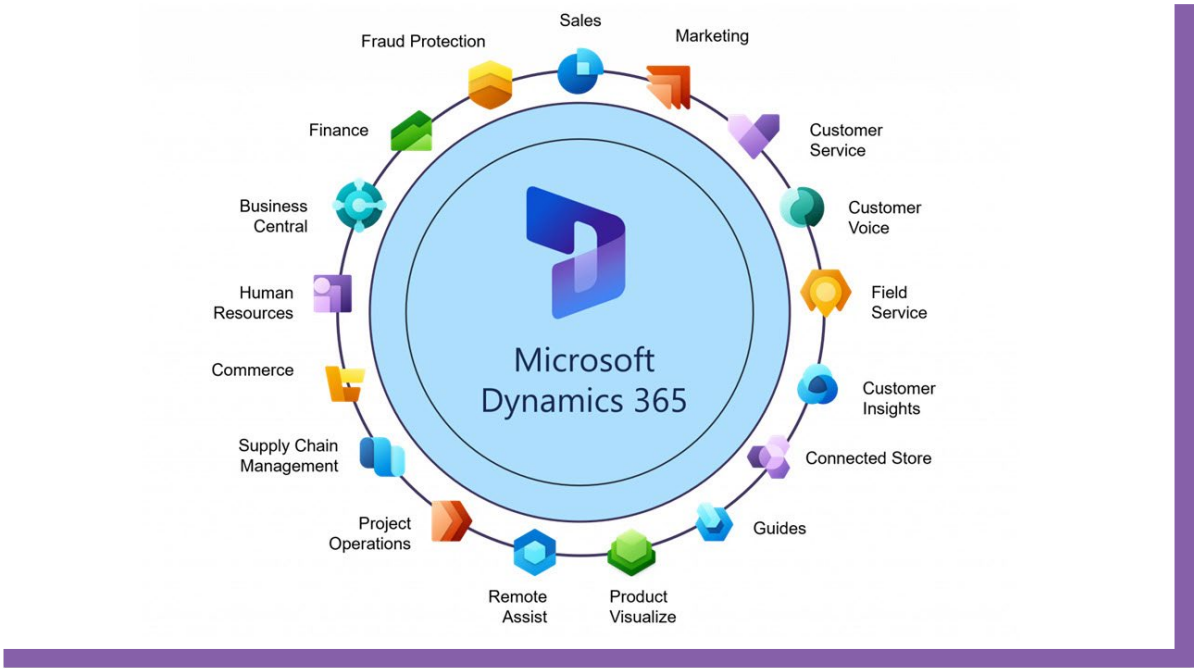
# Microsoft Dynamics Project Operations

Microsoft Dynamics Project Operations empowers delivery of project-based services with greater efficiency, team collaboration, and profitability. Part of Microsoft Dynamics 365, it aims at unifying all aspects of project-based services, including project planning, resourcing, execution, and financials within a single, comprehensive solution. Dynamics Project Operations is targeted at businesses involved in project-based services delivery and is a versatile, integrated solution designed to improve efficiency, collaboration, and profitability.

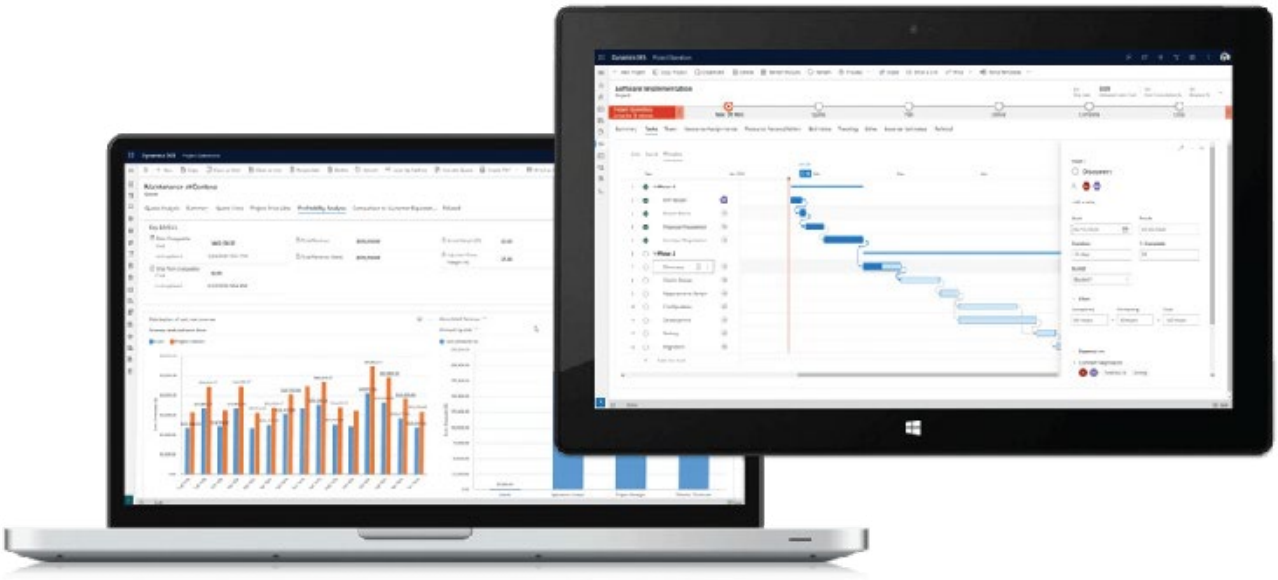
Dynamics Project Operations uses Microsoft Project for the Web for scheduling combined with the Dynamics Power Platform, digitising organisational-specific project processes. It is predominantly suitable for customer-facing (consulting) projects. Ideal for those using the entire Microsoft Dynamics suite, from the initial Sales and Marketing (CRM) to contract closure, to project planning and execution, and on to expense and project billing and profitability reporting.




As it is part of Microsoft Dynamics, using Dynamics Project Operations is highly advisable for organisations already using other Dynamics solutions. The lack of Portfolio Management and prioritisation is obvious for those tasked with project management in a consulting business. Since projects are paid for by customers (rather than coming from internal budgets) mapping against strategic goals typically is not required.




Managing internal projects with Dynamics Project Operations is possible. Should prioritisation be required, customisation is necessary, which can be achieved with the Microsoft Power Platform. There is a limitation with scheduling, which is performed in Microsoft Project for the Web which is incorporated as the Dynamics schedule tool.



# DYNAMICS PROJECT OPERATIONS STRENGTHS AND WEAKNESSES

## Strengths

- Integrates well with various Microsoft products.
- Caters to project-based businesses.
- Unified and versatile solution combining project management, resource scheduling, time and expense management, and finance capabilities, managing the cycle of project-based services delivery from beginning to end.
- The tight integration with Dynamics 365, Microsoft 365, and Power Platform enhances productivity, collaboration, and data analysis.
- Real-time insights and intelligent analytics allow for informed decisions.
- Improves customer engagement by providing transparency and insights into project progress and performance.
- Advanced resource management features help optimise resources.
- Scalable and adapts to various business sizes and complexities.
- Flexible and customisable.
- Robust time and expense management for accurate billing and project finances.
- Robust security and compliance.

## Weaknesses

- Potentially complex and overwhelming for new or less experienced users - steep learning curve.
- High cost to implement limiting its accessibility for companies with tighter budgets.
- Integration challenges for tools outside the Microsoft ecosystem.
- Customisation options may be limited.
- Deployment and maintenance require Dynamics capabilities.
- Updates and change frequency can be disruptive.
- User interface can be challenging, with cumbersome navigation.
- Some configurations have performance issues (slower load times and responsiveness).

# Altus – A PPM platform purpose-built for Microsoft 365

Altus is an AI-enabled, Microsoft 365 native Project Portfolio Management solution that supports both collaborative work management and strategic portfolio management. By combining all Microsoft schedule tools (and others, like Jira), Altus is a consolidated solution providing insights on all initiatives in your organisation. And it lets your people **use the tools they prefer for personal productivity.**

Altus captures the balance between **Work Management** and **Project Portfolio Management**, conducting all project/program and portfolio-related activities, and managing a Global Resource pool across all schedule tools including native integration with Microsoft Planner and Project Desktop.

Altus is AI-ready and Copilot enabled, which means AI works on your project data securely within your own Microsoft environment.

Altus is divided into 3 distinct tiers, providing a tool for everyone from the informal project manager, through to the seasoned professional, and a combined view for executives responsible for the portfolio. There is a clear path between each tier, addressing what's important for you right now, and what is important in the future.

- **Altus Project** enables project management for all methodologies and all project management maturity levels. It's a familiar and intuitive work and project management tool.
- **Altus Portfolio** enables program and portfolio management with a Global Resource pool. Resources are treated as an organisational constraint to be managed against the work required. Linking programs and portfolios to the achievement of Strategic Goals is a key capability in Altus Portfolio.
- **Altus Strategy** enables executive planning, prioritisation and optimisation across all activities required to ensure they fulfil organisational strategic objectives, while exposing, understanding, and managing risk.

## Project

Information Worker

Professional Project Manager

Citisen Project Manager

- Task Management
- Project Management
- Project Reporting
- Team Collaboration
- Project Financials
- Project Documents
- Change Requests
- Issues
- Risks
- Project Schedule

## Portfolio

Enterprise PMO

Program Manager

Portfolio Manager

Resource Manager

Functional Manager

- Portfolio Management
- Program Management
- Proposal Management
- Innovation Management
- Ideas Management
- Portfolio Dashboard
- Program Dashboard
- Resources Management
- Challenges
- Project Prioritising
- Timesheets

## Strategy

Executive Leadership

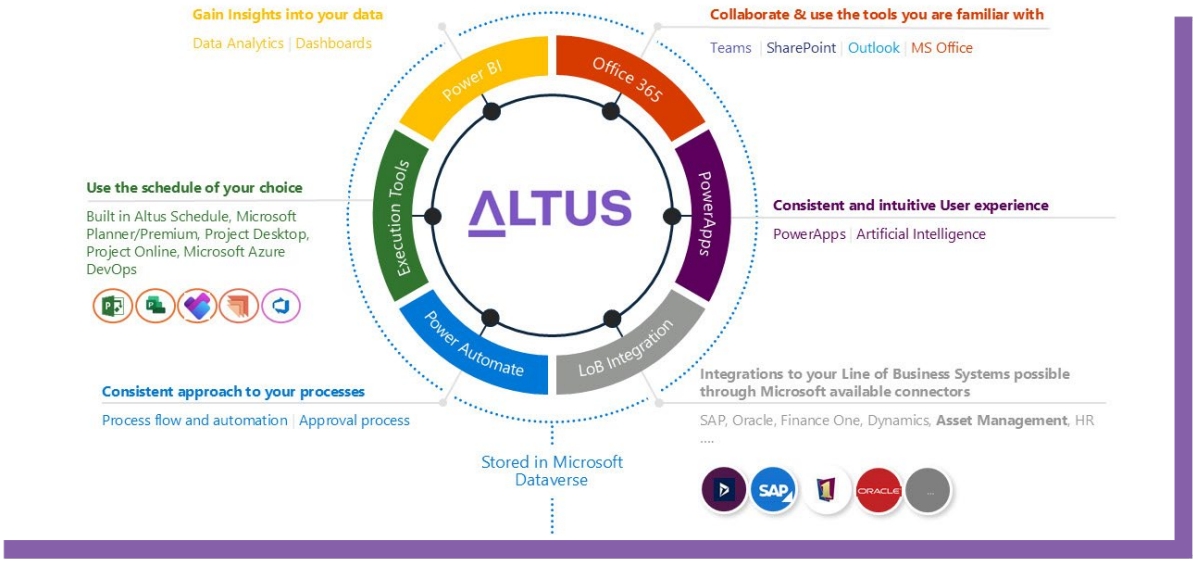
Senior Manager

Strategy Manager

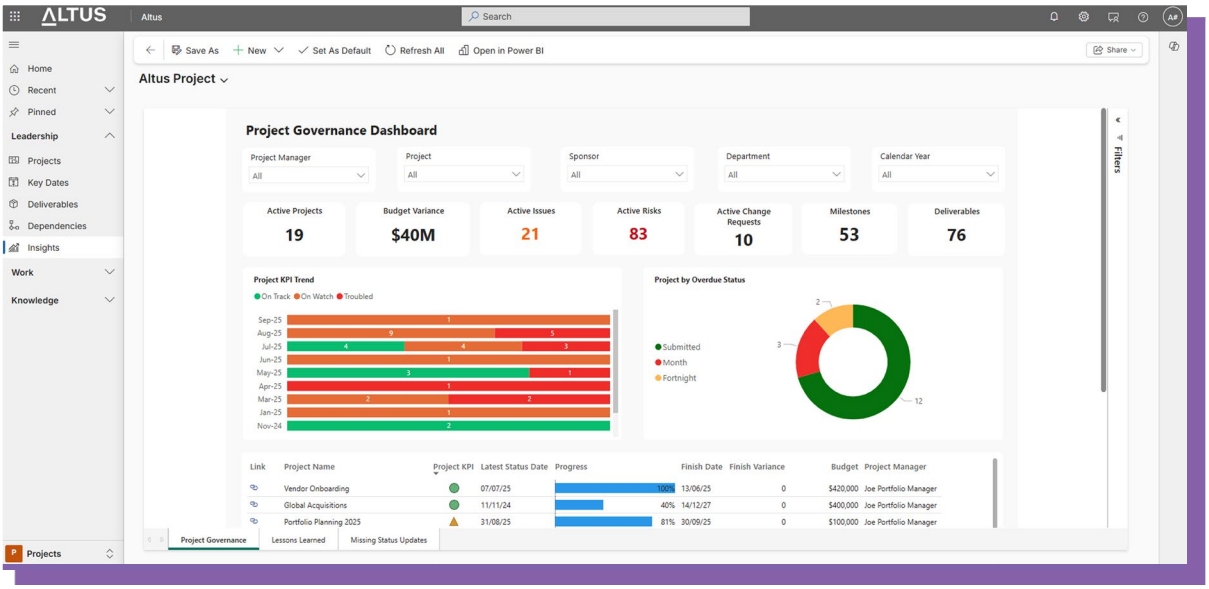
- Strategy Alignment
- Benefits Realisation
- Strategic Themes
- Strategic Goals
- Priorisation
- OKR's
- Optimisation

*Each Altus tier includes all features of lower tiers.

Altus maximises your Microsoft investment. Built on Microsoft 365 technology, Altus uses Microsoft building blocks to manage all initiatives in an effective and sophisticated manner.

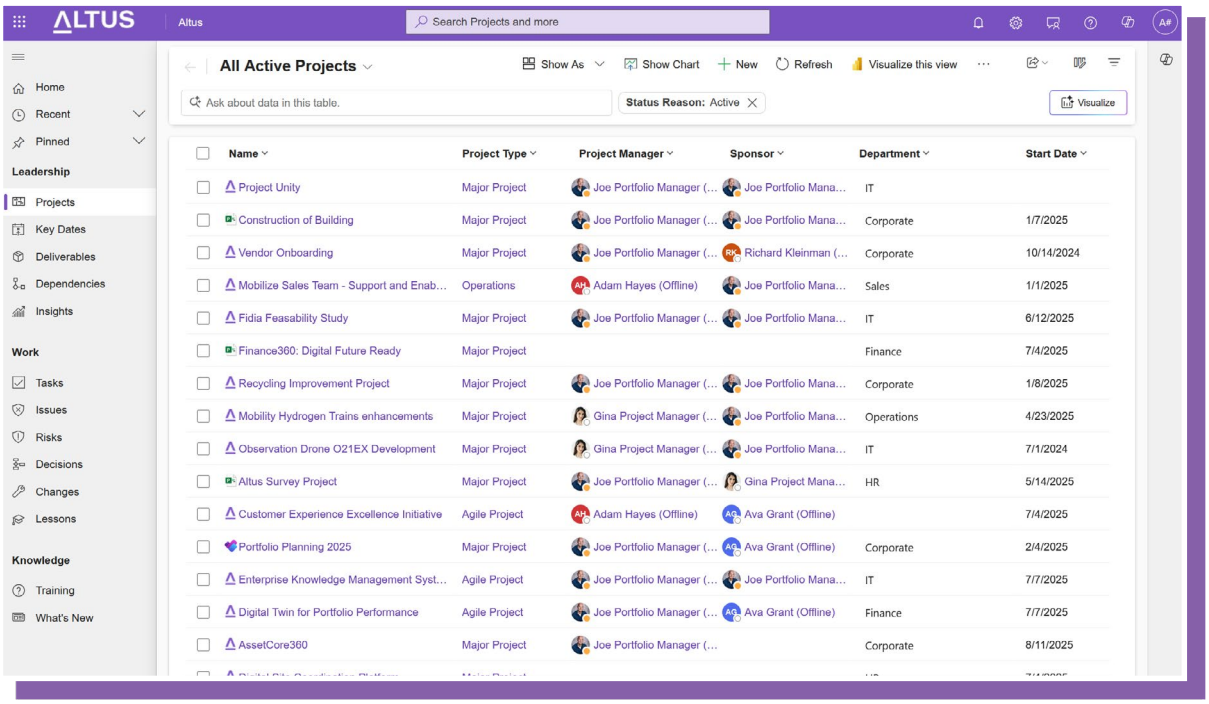



Providing a consistent and familiar user experience with all the Microsoft tools described above allows for a 100% user adoption across **all** maturity levels and **all** methodology levels.

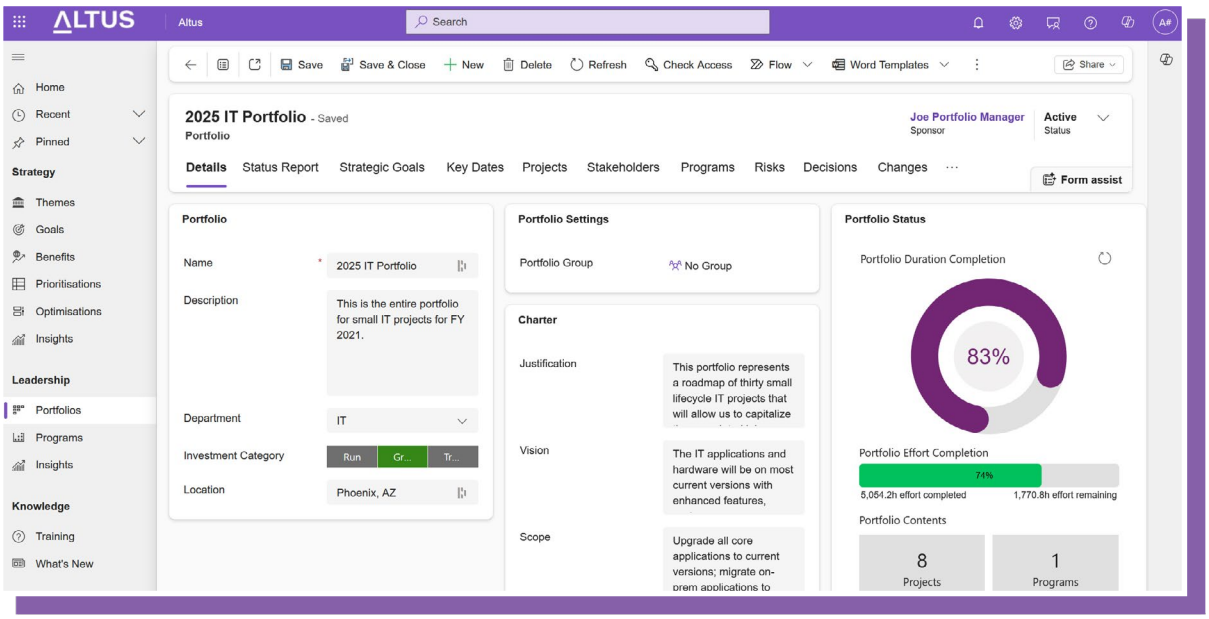



The screen above outlines the "one stop shop" for an individual managing all elements of a project. By using the Microsoft Power Platform, Altus is easily configured for organisational-specific process requirements.

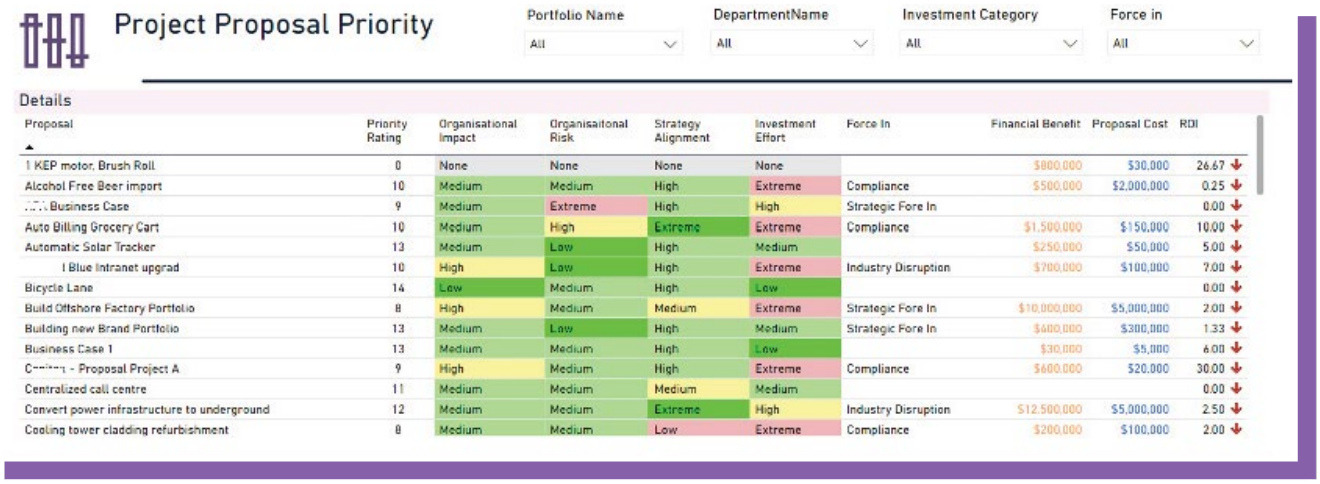
With Altus, gain visibility of all initiatives across the organisation and make objective decisions based on current data. With accurate and immediate insights, stay on top of every project, take targeted action early, and help drive consistent success from every initiative. Altus sheds light on the future of every project, giving senior and executive management insights to manage and move forward with confidence.




From a list of all actual projects and their KPI performance, to a consolidated Portfolio view, Altus delivers insights that inform data-driven, confident decisions.

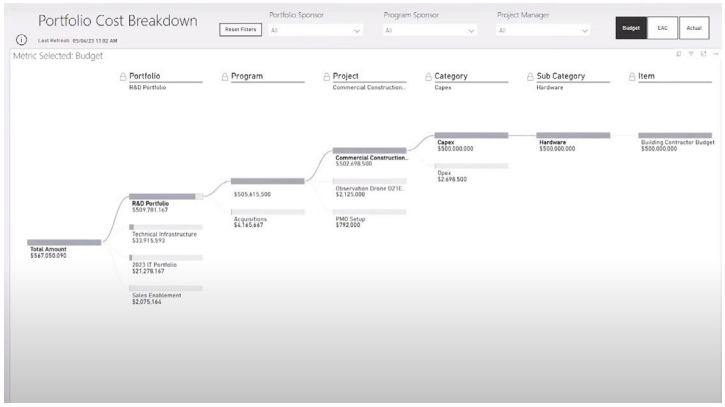


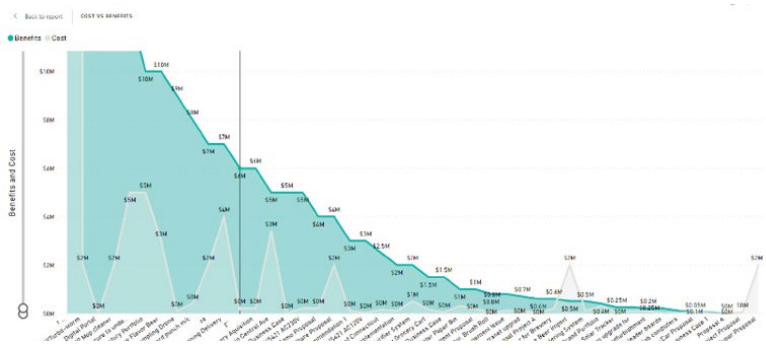
Altus enables “doing the right work” with prioritisation based on organisational-specific scores. An easily maintained user experience enables senior and executive managers to determine the most effective collection of initiatives that should be advanced to the anticipated outcome, supporting strategic goals.




| Proposal | Priority Rating | Organisational Impact | Organisaitonal Risk | Strategy Alignment | Investment Effort | Force In | Financial Benefit | Proposal Cost | RDI |
|---|---|---|---|---|---|---|---|---|---|
| 1 KEP motor, Brush Roll | 0 | None | None | None | None | | $800,000 | $30,000 | 26.67 |
| Alcohol Free Beer import | 10 | Medium | Medium | High | Extreme | Compliance | $500,000 | $2,000,000 | 0.25 |
| [illegible] Business Case | 9 | Medium | Extreme | High | High | Strategic Fore In | | | 0.00 |
| Auto Billing Grocery Cart | 10 | Medium | High | Extreme | Extreme | Compliance | $1,500,000 | $150,000 | 10.00 |
| Automatic Solar Tracker | 13 | Medium | Low | High | Medium | | $250,000 | $50,000 | 5.00 |
| I Blue Intranet upgrad | 10 | High | Low | High | Extreme | Industry Disruption | $700,000 | $100,000 | 7.00 |
| Bicycle Lane | 14 | Low | Medium | High | Low | | | | 0.00 |
| Build Offshore Factory Portfolio | 8 | High | Medium | Medium | Extreme | Strategic Fore In | $10,000,000 | $5,000,000 | 2.00 |
| Building new Brand Portfolio | 13 | Medium | Low | High | Medium | Strategic Fore In | $400,000 | $300,000 | 1.33 |
| Business Case 1 | 13 | Medium | Medium | High | Low | | $30,000 | $5,000 | 6.00 |
| [illegible] - Proposal Project A | 9 | High | Medium | High | Extreme | Compliance | $600,000 | $20,000 | 30.00 |
| Centralized call centre | 11 | Medium | Medium | Medium | Medium | | | | 0.00 |
| Convert power infrastructure to underground | 12 | Medium | Medium | Extreme | High | Industry Disruption | $12,500,000 | $5,000,000 | 2.50 |
| Cooling tower cladding refurbishment | 8 | Medium | Medium | Low | Extreme | Compliance | $200,000 | $100,000 | 2.00 |

## Compare Benefit vs Cost ratio or Return-on-Investment comparison.



Altus has native integrations with Microsoft Planner, Planner Premium and Project Desktop, and can be integrated with external scheduling tools, surfacing all schedule and resource information across the organisation in one central location. Users keep working in the tools they prefer, while managers and executives have all the information they need to prioritise and optimise all initiatives.

Altus is AI and Microsoft Copilot enabled, setting organisations up with a futureproofed platform for project and portfolio management.

ALTUS

## Seamless experiences for Microsoft platforms

Seamlessly work on the go using the technology you and your team know and trust. Altus is built on the Microsoft Power Platform, is fully integrated with Microsoft Teams, harnesses the power of Copilot, and is a Microsoft Preferred PPM solution.

# ALTUS STRENGTHS AND WEAKNESSES

## Strengths

- Seamlessly integrates all elements of Microsoft tech investment for comprehensive Project Portfolio Management (PPM).
- Manage all work-related initiatives tactically through Work Management and strategically through Portfolio Management – and then see both aligned.
- A comprehensive solution managing all projects, for optimal insight and visibility into every initiative.
- Manages Global Resource pool.
- Supports Waterfall, Agile, and Hybrid methodologies.
- Automates business processes for consistent and reliable data.
- Built-in with standard reports and dashboards, eliminating manual reporting.
- Future proofed with AI and Copilot capabilities to build at your pace.
- Microsoft Power Platform compatibility for low code-no code configuration and customisation.
- Built-in training facilitates user adoption.
- Local support and development team.
- Provides Executive Management with real-time insight into strategy execution.
- Built in industry standards and best practices.
- Secure - all data resides in the customer's Microsoft tenant.

## Weaknesses

- Depends on Microsoft 365, PowerApps and PowerBI.
- Partner/consulting engagement addressing organisational specific requirements necessary for deployment (those with Microsoft expertise can subsequently manage in-house).
- Non Software as a Service (SaaS). Altus deploys directly into the Microsoft tenant.
- Efficacy contingent on Microsoft applications including Teams, PowerApps, Microsoft Project, Planner with premium features and Planner. Implementation optimal when these applications are already in use.
- Robust change management, clearly delineated processes, and strong governance necessary for success.

# Features and Capabilities

Following a thorough assessment of Microsoft PPM tools and Altus, a detailed analysis of their features and capabilities has been carried out, focusing on the following criteria:

- **Centralised Project Data**: PPM tools provide a consolidated view of all project data, making it easier to understand the overall health and status of each project within a portfolio.
- **Resource Management**: These tools help in resource allocation by showing which resources are overutilised or underutilised, ensuring that people and assets are effectively assigned across various projects.
- **Budgeting and Financial Management**: Enable managers to track the financial performance of projects, from budgeted costs to actual expenditures, thus ensuring projects stay on budget.
- **Schedule Management**: The process of planning, coordinating, and monitoring specific tasks and activities within a project timeline to ensure timely and efficient completion.
- **Risk Management**: PPM tools often include features that help identify, assess, and manage potential risks across the project portfolio.
- **Strategic Alignment**: By providing a top-down view of all projects, PPM tools ensure that each project aligns with strategic goals.
- **Demand Management and Prioritisation**: These tools prioritise projects based on various criteria like strategic alignment, ROI, resource availability, etc., ensuring that the most critical projects get priority.
- **Reporting and Analytics**: Advanced analytics and customisable reports provide insights into project performance, helping stakeholders make informed decisions.
- **Collaboration**: Most PPM tools are equipped with collaboration features, facilitating communication.
- **Document Management**: The systematic process of capturing, organising, storing, and retrieving digital and paper documents.
- **Issue Management**: The process of identifying, tracking, and resolving or addressing challenges and problems that arise during a project or operation.
- **Automation of Business Processes**: The ability to reduce administrative overhead and governance by digitising business processes ensuring a consistent and trustworthy approach to work management.
- **Timesheet Management**: The ability to capture actual work against tasks assigned.
- **Portfolio and Program Management:** The ability to create and manage portfolios and programs including top-down and bottom-up planning. While this may not include all desired PPM solution features, it covers all conceptual capabilities required when evaluating a PPM solution.
- **AI and/or Copilot enablement:** Providing the ability to introduce AI assisted capabilities to support effective project and portfolio management.

# 04

# Features and Capabilities

The table below outlines the capabilities of the different tools. This helps choose the most appropriate solution. Please note, the table below outlines the capabilities based on the out-of-the box features without customisation.

**Legend:** ✓ Yes ✗ No – Partially

| Description | PSSE (Project Online) | Project Desktop | Planner with Premium features | Planner | DevOps | Dynamics Project Operations | Altus |
|---|---|---|---|---|---|---|---|
| **Centralised project data** | | | | | | | |
| PPM tools provide a consolidated view of all project data, making it easier to understand the overall health and status of each project within a portfolio. | | | | | | | |
| Centralised data storage for schedule information | ✓ | ✗ | ✓ | ✗ | ✓ | ✓ | ✓ |
| Centralised data of artefacts like Risks, Issues, Change Requests etc. | ✗ | ✗ | ✗ | ✗ | ✗ | – | ✓ |
| **Schedule Management** | | | | | | | |
| Schedule management is the process of planning, coordinating, and monitoring specific tasks and activities within a project timeline to ensure timely and efficient completion. | | | | | | | |
| Managing a project schedule | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |

| Description | PSSE (Project Online) | Project Desktop | Planner with Premium features | Planner | DevOps | Dynamics Project Operations | Altus |
|---|---|---|---|---|---|---|---|
| Managing Waterfall schedules | ✓ | ✓ | ✓ | ✗ | ✗ | ✓ | ✓ |
| Managing Agile schedules | – | – | – | ✓ | ✓ | – | ✓ |
| Using a global resource pool | ✓ | ✗ | ✓ | ✗ | ✗ | ✓ | ✓ |

**Budgeting and Financial Management:**

Enable managers to track the financial performance of projects, from budgeted costs to actual expenditures, thus ensuring projects stay on budget.

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| Budget Management | ✓ | ✓ | ✗ | ✗ | ✗ | ✓ | ✓ |
| Resource Cost | ✓ | ✓ | ✗ | ✗ | ✗ | ✓ | ✓ |
| Project Cost | – | ✓ | ✗ | ✗ | ✗ | ✓ | ✓ |
| Forecast | – | ✓ | ✗ | ✗ | ✗ | ✓ | ✓ |
| Actual | – | ✓ | ✗ | ✗ | ✗ | ✓ | ✓ |

**Resource Management**

These tools help in resource allocation by showing which resources are overutilised or underutilised, ensuring that people and assets are effectively assigned across various projects.

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| Managing a Global Resource pool | ✓ | – | ✓ | ✗ | ✗ | ✓ | ✓ |
| Project Manager requesting resources | ✗ | ✗ | ✗ | ✗ | ✗ | ✓ | ✓ |
| Resource Managers approving resources | ✗ | ✗ | ✗ | ✗ | ✗ | ✓ | ✓ |
| Managing resource calendars | ✓ | – | ✓ | ✗ | ✗ | ✓ | ✓ |

| Description | PSSE (Project Online) | Project Desktop | Planner with Premium features | Planner | DevOps | Dynamics Project Operations | Altus |
|---|---|---|---|---|---|---|---|
| Managing target allocation | ✗ | ✗ | ✗ | ✗ | ✗ | ✓ | ✓ |
| Resource Heat map | ✗ | ✗ | ✓ | ✗ | ✗ | ✓ | ✓ |
| Team Member managing tasks across all projects | ✓ | ✗ | ✓ | ✗ | ✗ | ✗ | ✓ |
| Resource Dashboards | ✗ | ✗ | – | ✗ | ✗ | ✓ | ✓ |

**Risk Management**

PPM tools often include features that help identify, assess, and manage potential risks across the project portfolio.

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| Managing Risks | ✓ | ✗ | ✗ | ✗ | ✗ | – | ✓ |
| Risk Reporting | ✓ | ✗ | ✗ | ✗ | ✗ | – | ✓ |

**Issue Management**

The process of identifying, tracking, and resolving or addressing challenges and problems that arise during a project or operation.

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| Managing Issues | ✓ | ✗ | ✗ | ✗ | ✓ | – | ✓ |
| Issue Reporting | ✓ | ✗ | ✗ | ✗ | ✓ | – | ✓ |

**Reporting and Analytics**

Advanced analytics and customisable reports provide insights into the performance of projects, helping stakeholders make data-driven decisions across all projects, programs and portfolios and resources.

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| Out of the box reporting | ✗ | ✓ | ✓ | ✓ | ✗ | – | ✓ |
| Dashboards | ✗ | ✗ | – | ✗ | ✗ | – | ✓ |

| Description | PSSE (Project Online) | Project Desktop | Planner with Premium features | Planner | DevOps | Dynamics Project Operations | Altus |
|---|---|---|---|---|---|---|---|
| Paginated Reports | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✓ |
| Centralised Data Model | – | ✗ | ✓ | ✗ | ✗ | ✓ | ✓ |
| Uses Power BI | – | ✗ | ✓ | ✗ | ✗ | ✓ | ✓ |
| Uses Excel | – | ✗ | ✓ | ✗ | ✗ | ✓ | ✓ |

**Strategic Alignment**

By providing a top-down view of all projects, PPM tools ensure that each project aligns with the strategic goals of the organisation.

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| Managing Strategic Goals | ✗ | ✗ | ✓ | ✗ | ✗ | ✗ | ✓ |
| OKR (Objectives & Key Results) | ✗ | ✗ | ✓ | ✗ | ✗ | ✗ | ✓ |
| Benefit Realisation | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✓ |
| Strategic Reports and Dashboards | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✓ |

**Demand Management and Prioritisation**

Prioritise projects based on various criteria like strategic alignment, ROI, resource availability, etc., ensuring that the most critical projects get priority.

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| Project Prioritisation/ Optimisation | ✓ | ✗ | ✗ | ✗ | ✗ | ✗ | ✓ |
| Ideation | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✓ |
| Business Cases / Proposals Management | – | ✗ | ✗ | ✗ | ✗ | ✓ | ✓ |

| Description | PSSE (Project Online) | Project Desktop | Planner with Premium features | Planner | DevOps | Dynamics Project Operations | Altus |
|---|---|---|---|---|---|---|---|
| **Timesheet Management**<br>The ability to capture actual work against tasks assigned to a user. | | | | | | | |
| Creating and maintaining timesheets | ✓ | ✗ | ✗ | ✗ | ✗ | ✓ | ✓ |
| Timesheet approval / rejection process | ✓ | ✗ | ✗ | ✗ | ✗ | ✓ | ✓ |
| Task update to schedule (where possible) | ✓ | ✗ | – | ✗ | ✗ | ✓ | ✓ |
| Timesheet reports and dashboards | ✗ | ✗ | ✗ | ✗ | ✗ | ✓ | ✓ |
| **Automation of Business Processes**<br>The ability to reduce administrative overhead and governance by digitising or AI enabling business processes, ensuring a consistent and trustworthy approach to work management. | | | | | | | |
| Stage Gate approvals | – | ✗ | – | ✗ | ✗ | ✓ | ✓ |
| Check lists | – | ✗ | – | ✗ | ✗ | ✓ | ✓ |
| Approval workflows | – | ✗ | – | ✗ | ✗ | ✓ | ✓ |
| Governance Reports | – | ✗ | – | ✗ | ✗ | ✓ | ✓ |
| AI/Copilot enabled | ✗ | ✗ | ✓ | ✗ | ✗ | ✓ | ✓ |
| **Document Management**<br>The systematic process of capturing, organising, storing, and retrieving digital and paper documents. | | | | | | | |
| Document Storage | ✓ | ✗ | ✓ | ✓ | ✗ | ✓ | ✓ |
| Document Version Control | ✓ | ✗ | ✓ | ✓ | ✗ | ✓ | ✓ |
| Document Sign-off | ✓ | ✗ | ✓ | ✓ | ✗ | ✓ | ✓ |

| Description | PSSE (Project Online) | Project Desktop | Planner with Premium features | Planner | DevOps | Dynamics Project Operations | Altus |
|---|---|---|---|---|---|---|---|
| **Program & Portfolio Management**<br>The ability to manage programs and portfolios. | | | | | | | |
| Portfolio top-down planning | ✗ | ✗ | – | ✗ | ✗ | ✗ | ✓ |
| Program top-down planning | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✓ |
| Portfolio Management | ✗ | ✗ | – | ✗ | ✗ | ✗ | ✓ |
| Program Management | ✓ | ✗ | ✗ | ✗ | ✗ | ✗ | ✓ |
| Portfolio Financial Planning | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✓ |
| Program Financial Planning | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✓ |
| Portfolio Risks and Issues Management | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✓ |
| Program Risks and Issues Management | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✓ |
| Portfolio Key Date Management | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✓ |
| Program Key Date Management | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✓ |
| Portfolio Reporting | ✗ | ✗ | – | ✗ | ✗ | ✗ | ✓ |
| Program Reporting | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✓ |
| **Collaboration**<br>The ability to see and manage tasks across teams and projects. | | | | | | | |
| Team Collaboration (using Microsoft Teams) | ✗ | ✗ | ✓ | ✓ | ✗ | ✓ | ✓ |

05

# Next Steps and Conclusion

With a comprehensive review of the tools Microsoft provides for project and portfolio management, selecting the most appropriate tools becomes easier. Ensure there is clarity on organisational requirements, and carefully consider these 10 crucial points:

### Identify Your Needs
Ascertain whether your needs are tactical (work management), strategic (Project Portfolio Management - PPM), or a combination of both.

### Methodology Compatibility
Evaluate whether you require scheduling tools to accommodate different project methodologies such as Waterfall, Agile, or Hybrid.

### Assess User Maturity Levels
Consider user proficiency levels. Do you have professional Project Managers only, or informal Project Managers requiring a different approach?

### Management of Global Resource Pool
Decide if you intend to manage a unified resource pool across various scheduling tools, aligning dispersed resources effectively.

### Alignment with IT Strategy
Ensure a choice coherent with IT strategy, especially if it is oriented towards Microsoft 365 solutions and the introduction of AI and Copilot enabled technology platforms.

### Capture of Actuals in Timesheets
Determine if there is a need for meticulous recording of actuals in timesheets.

### Implementing Change Management and Governance

Beyond tool implementation, establish robust change management processes and governance structures. Their absence causes failure of many PPM deployments (rather than the ineffectiveness of the tool itself).

### Consider the Implementation Partner

Look beyond the tool and scrutinise the competence and experience of the partner assisting in PPM implementation.

### Objectively Assess Current Capabilities

Realistically understand and assess your current state without overestimating capabilities, maintaining objectivity in evaluation.

### Clearly Outline End Goals and Roadmap Development

Clearly define the desired outcome and develop a pragmatic roadmap bridging the gap between current state and end goal, avoiding overly ambitious or impractical plans ("do not boil the ocean").

### Updates & Innovation

If you are transforming your organisation's project and portfolio management approach ensure the system receives regular updates to functionality, including new features that keep pace with best practice, like the introduction of AI capabilities.

### Conclusion

By systematically addressing each of these aspects, and with a clear understanding of the Microsoft PPM tools and solutions, your team is equipped to make informed decisions, aligning PPM solutions with strategic objectives, user needs, and operational realities. This contributes to the introduction of tools that make projects and portfolios more likely to succeed. It also meets the needs of your people, all of whom are striving to create value and do a better job of project delivery.

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