



Modernizing your Project and Work Management Estate: Why, When, and How

Including Transitioning from Microsoft Project Online

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Introduction

Successful project and work management is central to every thriving organization. Yet, traditional, siloed project management tools have become obstacles rather than enablers, creating friction in collaboration, limiting flexibility, and ultimately undermining efficiency and innovation. It's clear we are at a pivotal moment: the move toward a unified platform-first approach powered by Microsoft's secure, AI-enhanced ecosystem represents a genuine opportunity to fundamentally elevate organizational performance.

This whitepaper explores **why** modernizing your project and work management estate isn't just beneficial—it's essential. It will also clarify **when** to act to maximize your advantage, and show you **how** to strategically execute modernization, transitioning from legacy tools like Microsoft Project Online toward a comprehensive Microsoft ecosystem that unifies people, applications, and data.

Optimizing the platform ushers in a new era of symbiotic human-AI management, revolutionizing the way organizations operate. It empowers professional project managers to make data-driven decisions with unprecedented accuracy, enables citizen managers to streamline workflows effortlessly, and fosters seamless collaboration among team members. Executive stakeholders gain real-time insights into project performance, driving strategic initiatives with confidence and agility. This transformation not only boosts productivity but also cultivates a culture of innovation and continuous improvement across the organization.

Past, Present, & Future of Microsoft Project Mgmt., Collaboration, Automation, and AI Technologies

Microsoft's journey from standalone project management tools toward an integrated, AI-driven, and collaborative ecosystem mirrors broader trends in organizational work management. While traditional solutions such as Project Desktop, Project Server, and Project Online provided significant value, their legacy architecture and lack of modern cloud capabilities make them unsustainable for future enterprise PPM demands.

This historical perspective helps to understand how Microsoft has shifted towards a unified, AI-powered, cloud-first, and collaboration-centric work management ecosystem. Organizations that understand this evolution can proactively modernize their project management strategy, reduce technical debt, and leverage Microsoft's latest innovations for agile, scalable, and efficient project management.

Evolution of key Products

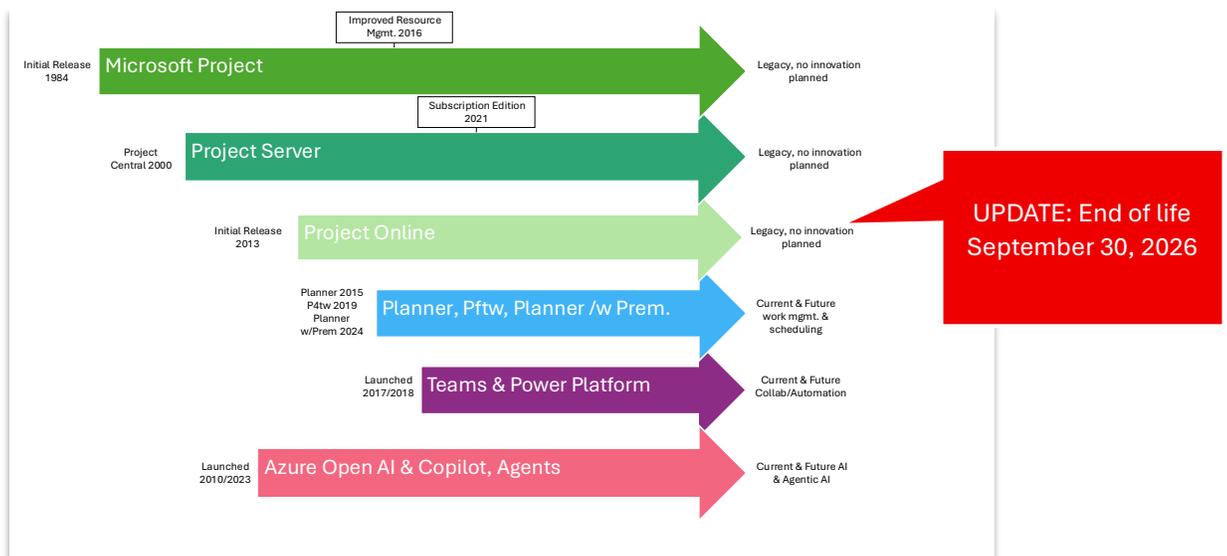


Figure 1 – Technology Timeline

This evolution exemplifies Microsoft's focus on platform integration, moving from separate project management tools to integrated solutions that are AI-powered and collaboration-centric within Microsoft M365, Teams, Power Platform, Copilot/AI.

The future of Project Desktop, Project Server, and Project Online

Project Desktop and Server have been mainstays of project management for decades. However, they are destined to fade into history. No deprecation date has been given for these products but, according to Microsoft, they have not received investment for notable functionality improvement and none is planned. Given that they are not connected to the modern cloud, their role has been relegated to legacy solutions. Although they have provided tremendous value for many years, they are not part of a modern project management approach on the Microsoft platform.

Project Online is essentially Project Server in the cloud but not part of the modern platform (i.e. Power Platform/Dataverse). It too is fated for extinction, and for years Microsoft has strongly suggested that customers transition off the product (Microsoft, n.d.). Ongoing feature/capability deprecations signal an end to the product in the foreseeable future.

Microsoft have now announced that there is an end-of-life date for Project Online – currently planned for 30 September 2026. New instances of Project Online will likely be unavailable a few months in advance of this date.

Project Server 2016 and 2019 will go out of extended support in July 2026, however, Microsoft have announced continued support for Project Server Subscription Edition until 2031.

Microsoft Planner and Planner with Premium Features



Today's version of Microsoft Planner is a modern, AI-centric application designed for users across the organization to manage initiatives ranging from basic task management to complex project and portfolio management (PPM). Planner leverages key attributes of many familiar products including using the MS Project core scheduler and combining To-Do, Planner, and Project for the web (Pftw) capabilities.

For simple work, termed Collaborative Work Management (CWM), Planner provides a modern user-friendly experience that requires little training or support. For complex PPM solutions, also termed Enterprise Work Management (EWM), Planner provides the ability to extend that experience with platform technologies.

To support extensibility, Microsoft has provided customers and partners Power Apps licensing at various levels with Planner. The P1, P3, and P5 licensing types provide increased functionality at each level. Project/Planner license subscriptions are similar to Dynamics 365 (D365) subscriptions (so some of the same rules apply to [D365](#) as well), in that they provide users with access to Dataverse and Model-Driven Apps without directly requiring the Power Apps premium license subscription. That means many customers that have Project Online already and have a segment of users with Project Plan 3 and Plan 5 already have access to Planner, and therefore the Dataverse. This is because Planner with premium features (i.e. features from Project for the web, Copilot, etc.) is a first party Power App with a complete collection of Dataverse tables. These tables are automatically provisioned in the tenant (in the default environment) the moment a user with a Project license goes to <https://projects.microsoft.com> or attempts to convert a Planner basic plan to a Planner with premium features plan. These licenses allow users to access the Power App in both the browser and in the Power App environment. It also allows users to customize the Power App and add custom tables.

The Project license suite does not give someone access to premium or custom connectors. Therefore, Canvas apps that utilize these types of connectors or Dataverse actions cannot be used. The following table provides an overview of entitlements that accompany each license SKU.

	Project Plan 1	Project Plan 3	Project Plan 5
Additional Dataverse Storage	50MB	250MB	250MB
Customizations:			
Number of Custom Tables	5 Tables	15 Tables	Unlimited
Power Automate Cloud Flows	Project Tables and Custom Tables	Project Tables and Custom Tables	Project Tables and Custom Tables
Advanced Features:			
Copilot for Planner		Included	Included
Task History		Included	Included
Critical Path		Included	Included
Assignments View		Included	Included
Management of Resource Bookings and Skills			Included

There are several additional differences between the [Project SKUs](#) and is expanding as new features are being added to Planner with premium features.

Why Modernize Your Microsoft Project Management Estate?

Organizations today must continually modernize their approach to project and work management to stay agile, productive, and competitive. Traditional project management tools often create fragmented systems and data silos, impeding collaboration, visibility, and decision-making. For many, the Microsoft M365 platform is where most information workers are already getting work done.

By embracing a Microsoft platform-centric approach for project management—leveraging integrated solutions like Teams, Power Platform, and AI-driven tools such as Copilot—businesses can unify their workflows, automate repetitive tasks, and empower teams with real-time insights. This integrated strategy not only simplifies IT management and licensing but also provides enterprise-grade security, scalability, and continuous innovation, positioning organizations for long-term efficiency, flexibility, and growth.

Modernizing your project management estate on the modern Microsoft platform offers numerous key benefits including:

Aligning with Microsoft’s Cloud and AI Strategy

- Empowering all organizations with AI is central to Microsoft’s mission
- Copilot in Planner & AI-driven task recommendations signals AI-enhanced project execution
- Embracing an AI-driven project and work management approach provides competitive advantages
- AI reduces mundane work and helps make informed decisions swiftly

Maximizing M365 & Teams as the Work Hub

- 90% of projects require team participation as opposed to individual responsibility (Katherine Stone, 2023)
- Microsoft Teams is where work happens. Therefore, making it the central experience for project management reduces context switching and increases efficiency

- Embedding project management into existing collaboration tools reduces complexity and improves adoption
- Unification of data creates a single source of truth for project management

Enhancing Business Agility with Low-Code/Pro-Code via Power Apps

- PPM solutions often require significant customizations to meet specific needs; embracing a Microsoft platform-centric approach comes with the notion of using Power Apps for necessary customizations going forward
- Low-code is mainstream, even for professional developers
 - 89% of developers spent at least some time in low-code platforms in the last year
 - 50% reduction in app development time with Power Apps (Forrester, 2024)
- Power Apps allows non-technical users to create workflows and reports

Avoiding Legacy Tool Dependency

- Tools like Project Server are being phased out in favor of cloud-native, collaborative solutions.
- Companies relying on legacy tools must transition to modern solutions to ensure future-proofing

Scalability and Security at the Core

- The Microsoft cloud offers enterprise-grade security, compliance, and scalability
- Centralizing project data within this secure environment minimizes risks associated with fragmentation, helps with data loss prevention (DLP), and ensures more robust governance

Better Visibility for Leadership and Teams

- Utilizing a platform-centric dataset provides near real-time reporting and visibility across all projects and work
- This transparency enables stakeholders to access actionable insights promptly, facilitating more accurate information-driven decision-making
- When combined with improved historical and related data, it allows for trends and patterns to be identified, eventually leading to better planning and even predictive decisions based on historical performance and real-time data from the ever-changing environment
- When coupled with the power of AI, the insights and improved decision-making capability can become a differentiator and if not used can make a company no longer relevant/competitive; any company that is not moving in this direction will be left behind

Cost, Licensing Efficiency and Simplified IT Management

- Most organizations already have Microsoft 365 licenses, allowing them to enhance their project management capabilities without significant additional licensing investments
- This approach streamlines IT operations, reduces the proliferation of disparate tools, and lowers the total cost of ownership

Future-Proofing with Continuous Innovation

- The Microsoft platform evolves continuously, introducing new features and integrations regularly
- Leveraging the latest technologies helps align with industry best practices

Observation: For a long time, the mantra around PPM is that there should only be one tool. This sometimes leads to infighting in organizations and political capital being spent on fiefdom building around a toolset and or methodology. While it is always a good idea to minimize the number of tools in an organization, building on the modern Microsoft platform means that teams can use the tools and methodologies they need to get their work done, and the organization can still bring the data and collaboration together to make it make sense for their organization's needs. As technologies and methodologies change, it is no longer necessary to war over these, and infighting and political battles can be set aside to focus on adding value to the organization.

By transitioning to a modern Microsoft platform-based project management system, organizations can overcome the limitations of outdated, siloed tools. This shift fosters a secure, scalable, and AI-enhanced environment that unifies people, processes, and technology, unlocking true agility and performance.

Embracing this platform-first approach not only addresses current project management challenges but also positions your organization for sustained success in an ever-evolving business landscape.

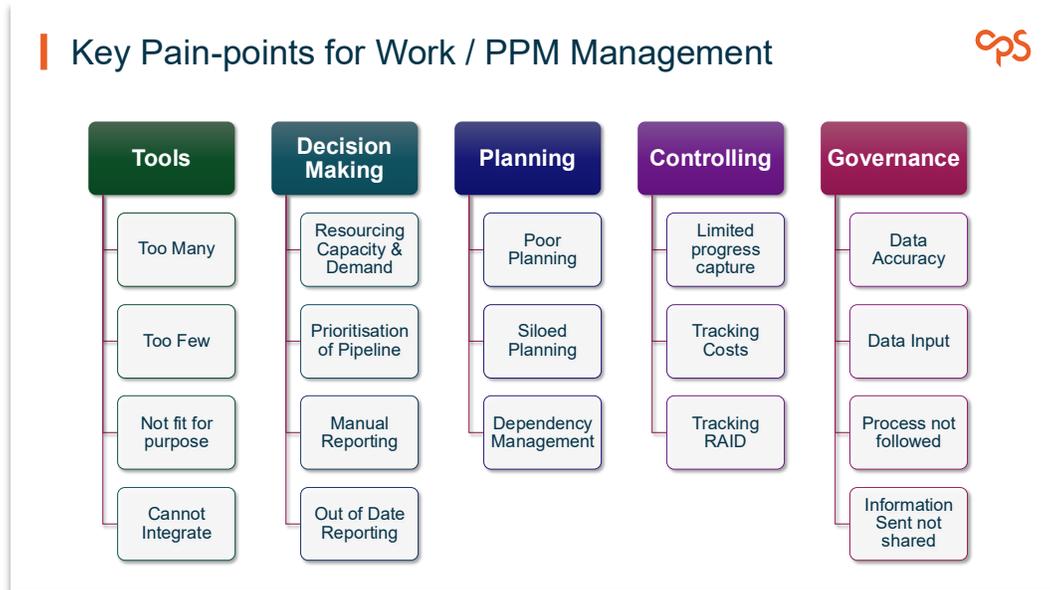


Figure 2 - Reasons why organizations may choose to modernize

When to Modernize Your Project Management Estate

Organizations must proactively evaluate when to modernize their approach to project and work management, as delaying modernization comes with significant operational and business risks. For organizations dependent on Microsoft’s Project Online, the urgency is heightened as Microsoft actively phases out legacy features and platform components, risking disruption, compliance issues, and increased costs.

Transitioning proactively toward a unified, Microsoft platform-centric approach—including Microsoft 365, Teams, Power Platform, and AI-driven solutions like Copilot—not only mitigates these risks but also positions organizations to improve productivity, streamline IT operations, and ensure continuity. Early adoption allows for structured planning, smoother transitions, and maximizes long-term value, while delay increases exposure to disruption, higher transition costs, and competitive disadvantage.

Recognizing the Need for Change

Organizations should consider modernization when they experience:

- **Fragmented tools:** Disparate systems that create inefficiencies
- **Siloed data:** Lack of a unified source of truth
- **High maintenance costs:** Rising expenses to support outdated and redundant systems
- **Adoption challenges:** Multiple tools create inefficiencies from context switching on similar work e.g. collaboration via chats, doc sharing, etc.
- **Divergent approaches:** Departmental/organization/business units across the organization create workstreams that aren’t linked to central strategy or each other.
- **Technology changes:** Underlying solution tool capabilities change or are deprecated including the end of legacy systems

It is important to note that not every SaaS product on the Microsoft cloud is on the modern platform. Tools like Project Online are built on legacy SharePoint and other technologies. As the underlying legacy platform components are affected, so is Project Online. To this end, Microsoft has begun *phasing out features in Project Online*, creating risks for organizations that rely on Project Online based solutions. These deprecations signal the need for proactive transition from Project Online to the modern platform to avoid operational disruptions, maintain compliance, and leverage modern functionality.

Microsoft Project publicly disclosed deprecations and announcements include:

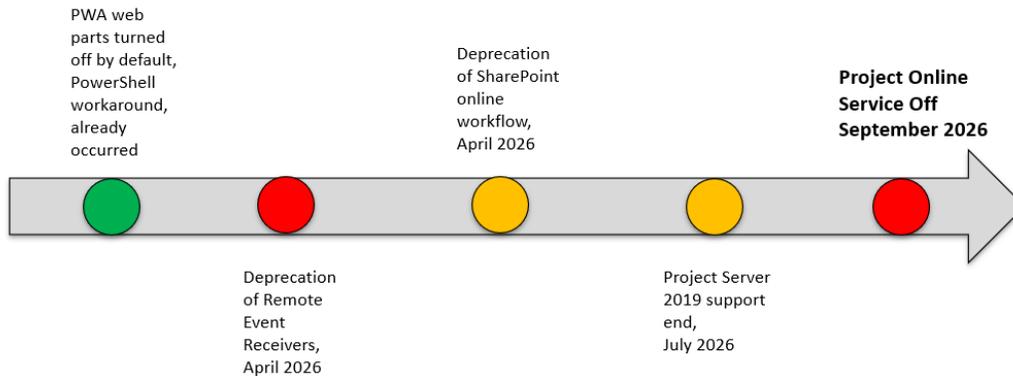


Figure 3 – MS Project Deprecations Timeline (UPDATED)

In the end, organizations will face a choice to bet on the Microsoft platform or choose another PPM Software as a Service (SaaS). Given that many organizations also use Microsoft modern platform technologies like M365, Teams, PowerApps, and Copilot, these organizations will enjoy higher project performance for both complex PPM and lower maturity solutions at lower long-term cost by using Power Apps to extend the platform into their own PPM solution.

The Cost of Inaction

Delaying modernization increases the ongoing risk of inefficiencies & low adoption, falling behind competitors, and being locked into costly and outdated systems. Another risk of delayed action is the potential for higher costs and business disruptions associated with a hastily planned and executed transition with a backdrop of hard dates (i.e. feature or product deprecations).

Early adoption enables organizations to get ahead of potential issues while unlocking the benefits of a unified platform sooner. It also allows for a smoother transition to the new solution with ample time for organizational change, user adoption, and solution tuning/optimization.

Specific Timeline Recommendations for Microsoft Project Online

Microsoft has been encouraging customers for the last several years to begin the process of transitioning off Project Online. As noted above, there are tremendous benefits transitioning to the platform sooner than later. In addition, delaying introduces the risk of being in a ‘must move’ situation that can result in significant disruption and higher costs. To mitigate this risk, we suggest that organizations that depend on Project Online build and execute their transition plan now.

Organizations typically take more than a year from concept to completion of complex solution projects. The following are some working milestones that could be used and are based on experience, factoring in typical timings for planning, budgeting, vendor/resource acquisition, pilot/POC, transition execution, adoption, sustainment, and support:

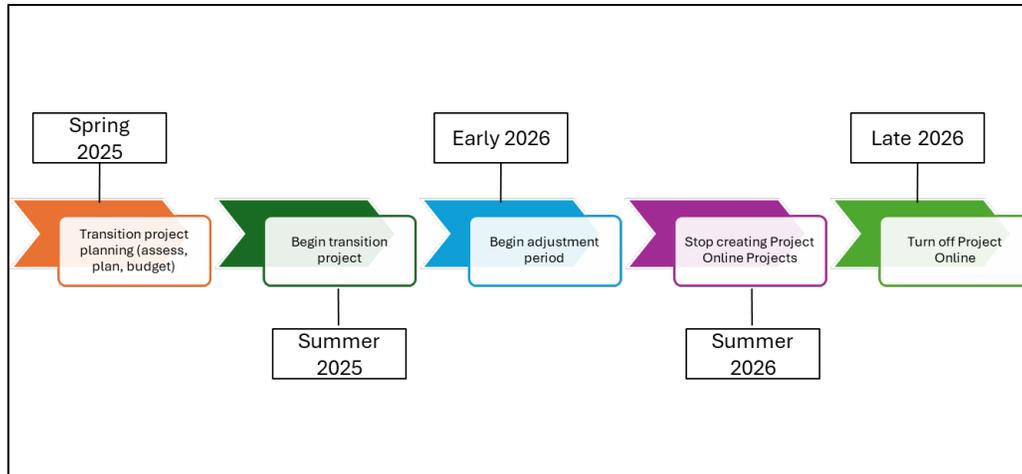


Figure 4 – Suggested Transition from Project Online Schedule

How to Modernize Your PPM Estate

To successfully modernize your PPM environment, it is essential to shift from a traditional migration mindset—moving from one similar tool to another—to a transformative, platform-first approach. Legacy solutions like Project Online and Project Server cannot simply be replaced by newer versions of the same tools, as feature parity with modern alternatives such as Planner or Project for the Web is not the goal.

Instead, organizations should embrace a new approach, fundamentally reassessing existing requirements, processes, and system designs originally shaped by legacy technology. By viewing this transition as a strategic evolution rather than a direct migration, organizations can leverage the flexibility, power, and scalability of the Microsoft modern platform (Teams, Power Platform, AI/Copilot) to build tailored, efficient, and future-ready PPM solutions that align closely with current business needs and long-term strategic goals.

A Reimagining Mindset

It is critical to understand that while getting all the benefits of the modern platform, the SaaS *Planner/Pftw products do not have feature parity with Project products and likely never will*. In fact, when first introduced in 2019, Microsoft clearly stated that they were not building the next PPM platform, rather they were building a platform for PPM.

This necessitates a new approach to PPM solutions built on the Microsoft Modern Platform. We must collectively shed years of Project, Project Server, and Project Online thinking in favor of the platform-first approach. This means analyzing the core rationale for specific requirements and resulting solution implementations that may have been (at least partially) based on the legacy tool technology architecture.

Transition vs Migration

While redesigning an embedded Project Online PPM solution to be platform-centric will take effort, it doesn't have to be akin to a 'Rip and Replace' move from one PPM tool to another. In the case of transitioning from Project Online to a platform-centric solution, many options are on the table for organizations to choose from.

Analysis of Organization and Platform

There are many approaches to modernizing your platform and choosing what's most appropriate for your organization will depend on multiple factors, including:

- Organizational readiness and change management
- Technical complexity and integration needs
- Resource availability and cost considerations

- Business continuity and risk management

In all scenarios below, historic data may need to be preserved due to regulatory restrictions or reporting needs. Consideration will need to be given for maintaining an archive of this data or moving it across.

Types of Modernization Scenarios

Modernization Approach	Description	Steps	Considerations
Direct to Platform	A full transition where all projects and data are migrated at once to Project for the web/Planner and the Power Platform.	<ul style="list-style-type: none"> - Assessment: Evaluate current processes, data structures, and dependencies - Tool Selection: Identify migration tools or accept manual transfer - Data Mapping: Align legacy system fields with the new platform - Migration Execution: Transfer data. - Validation: Ensure data integrity and functionality 	<ul style="list-style-type: none"> - Complexity: Can be challenging with customizations - Downtime: Possible system unavailability - Training: Users need to adapt to the new platform
Multi-step	A phased approach where projects and data are moved incrementally over time	<ul style="list-style-type: none"> - Design a Transition Approach: Define logical groups for transition (e.g., departments, work programs) - Identify Candidate Data: Determine what should be migrated and what can remain in the legacy system - Pilot Transition: Test transition with a small set of projects - Feedback Loop: Adjust the process based on user feedback - Incremental Transition: Continue transition in batches - Final Transition: Decommission the legacy system 	<ul style="list-style-type: none"> - Resource Allocation: Requires planning over time - System Integration: Ensure seamless operation between old and new systems. - Change Management: Ongoing communication and user support
Hybrid	Both systems run concurrently, allowing for a gradual transition	<ul style="list-style-type: none"> - Assessment: Identify projects or teams that would benefit from the new platform - Parallel Operation: Run both systems simultaneously, letting teams transition as needed - Data Synchronization: Keep data consistent between systems - Gradual Adoption: Encourage teams to migrate over time 	<ul style="list-style-type: none"> - Integration Challenges: Ensuring data consistency between systems - User Training: Users may need to work across both platforms - Long-Term Strategy: Define clear timelines for full transition
Project Server Subscription Edition	‘Stop the clock’ by lift and shift the server version.	<ul style="list-style-type: none"> - Work with your Microsoft account team - Consult with the Planner Product team 	<ul style="list-style-type: none"> - In many cases customizations will continue to work with minor modifications. - Requires migration. - Potentially could be part of a Hybrid solution to bridge to the future. Some

Modernization Approach	Description	Steps	Considerations
			partner solutions support this.

In the hybrid scenario, Microsoft recommends managing existing projects to completion in Project Online while creating new projects in Project for the web as it meets business needs.

Each of these scenarios offers distinct advantages and challenges. Organizations should carefully assess their specific requirements, resources, and long-term goals to determine the most suitable transition strategy.

Transition Approaches

Transition to a new platform can be approached in a variety of ways. Here are some of the most common scenarios, but it is worth keeping in mind that there is no single ‘right answer’ and that all organizations are different.

Key Steps for Each Department or Solution Area

Assess the Current State

- Audit tools in use, including Project Online, Planner, 3rd party (non-Microsoft), and custom solutions
- Identify inefficiencies, feature gaps, and user pain points
- Map dependencies and integration requirements
- Benchmark your current maturity for PPM practices and processes. Use tools such as the Gartner IT Score PPM Maturity Model (Gartner, 2017):

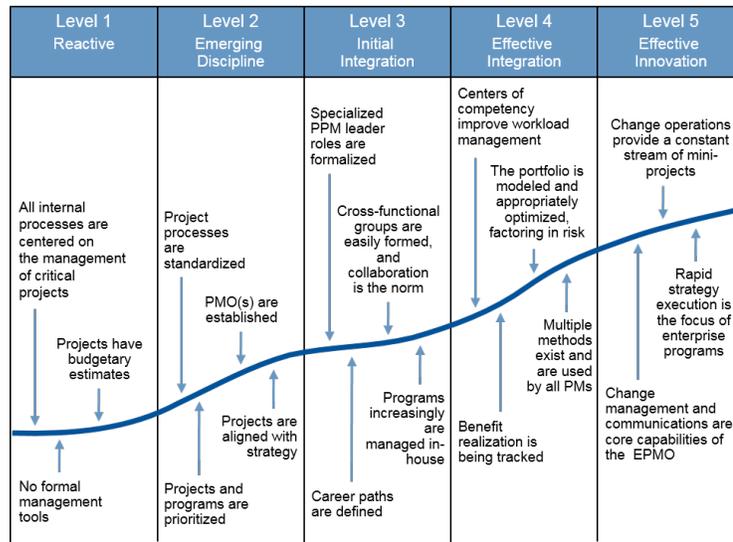


Figure 5 - Gartner IT Score PPM Maturity Model

Define a Vision for the Future

- Align project management capabilities with business objectives
- Map current and evolutionary PPM processes to tool processes – this will help you define your requirements for the PPM platform
- Set measurable outcomes, such as improved user adoption or reduced costs

- Consider a scoring method for requirements (e.g. MoSCOW) to define minimum viable product (MVP) and ensure goals are achievable considering maturity growth in people, process, and technology
- Have a vision and a plan for rollout and adoption; everyone will not embrace change at the same rate

Build on the Microsoft Power Platform

- Power Apps: Tailor solutions to unique workflows
- Power BI: Deliver actionable insights with dynamic dashboards and real-time analytics
- Power Automate: Simplify and automate routine tasks
- Microsoft 365 Copilot & Agents: Provide AI-driven support to improve efficiency and decision-making

Execute a Phased Transition

- Start with pilot programs in specific departments
- Gradually evolve critical functions from legacy systems to modern tools
- Apply lessons learned to subsequent rollouts for smoother implementation
- Set a cut-off date for creating new projects in Project Online and other legacy applications
- Ensure projects still managed in legacy applications & Project Online finish prior to deprecation or licensing cutoff of utilized features

Foster Adoption Across the Organization

- Engage stakeholders to champion the initiative
- Provide training tailored to different user groups
- Communicate early wins to drive momentum and enthusiasm

Challenge Areas

Inertia

Addressing change management and user adoption is crucial for overcoming resistance due to familiarity, lost functionality, and disruption to established workflows. Early engagement, clear communication, and structured adoption support are key. Involving solution owners ensures governance and reporting needs are met, while tailored training helps end users adapt. A phased approach allows gradual transition, and demonstrating Power Platform's extended functionality addresses perceived gaps. Success hinges on ongoing support and visible benefits, with champions advocating for change and quick wins like automation, improved reporting with Power BI, and enhanced collaboration via Teams shifting the conversation from resistance to recognition of the new platform's value.

Managing Feature Gaps

While gaps exist in areas like resource management and task-level custom fields, these can be addressed through APIs, custom Power Apps solutions, Microsoft Partner apps, and ongoing updates from Microsoft. And as AI capabilities improve, more elusive capabilities like scenario analysis or predictive analysis become available as well.

The following capabilities that exist in Project Online do not yet have feature parity:

- Task approvals
- Time phased actual work
- Task level custom fields in the schedule (available in other tables and for reporting)
- Granular editing permissions for the schedule
- Master & sub-projects
- Earned value
- Deadlines
- Task types for each task (limited to the schedule overall)
- Cross-project linking
- Offline schedule updates (for 'what if' planning, etc.)

Driving Organizational Change

Clear communication of benefits, targeted training, and stakeholder engagement are critical for successful adoption.

Balancing Innovation and Security

Microsoft is a leader in providing industry leading security and responsible AI to customers using their platform. Microsoft's Power Platform and AI integration with Microsoft 365 ensures enterprise-grade security and compliance while enabling innovation.

How to sell internally: Finding or Creating a Strategic Window of Opportunity

While a modernization journey can be less disruptive and resource intensive than a wholesale PPM app/platform replacement, it will require investment up front and over time. Obtaining executive support and resources (internal, external, funding, etc.) will require convincing management that the investment is worthwhile, required, and time critical.

Observation: For complex enterprise PPM needs, many organizations have allocated ongoing investments to maintain their relevance. This budget can be shifted to modernization efforts. Organizations that followed a 'set it and forget it' approach will need to obtain new budget but are likely not realizing the full benefit from their current PPM solution anyway.

Persons in leadership roles that are seeking resources for a project to modernize PPM/work management must strategically identify the right timing—what is often called a "window of opportunity." Aligning with this helps with stakeholder buy-in, budget alignment, and a clear business case for the investment. Here's why timing matters and when to act:

Aligning with Organizational Strategic Initiatives

- Companies prioritize funding for initiatives tied to business strategy (e.g., digital transformation, operational efficiency, or AI adoption)
- When leadership is investing in modernizing IT infrastructure, it's an opportune moment to position project and work management as a critical enabler
- Strategic Window:
 - During annual or quarterly planning cycles—when leadership is assessing priorities and budgets
 - When digital transformation initiatives are active—to align with existing funding

Tip: Frame the solution as a business transformation driver, not just another IT tool

Leveraging Organizational Pain Points

- If projects consistently face delays, cost overruns, or misalignment, it signals a need for modernization
- When leadership is frustrated with lack of visibility, reporting challenges, or team inefficiencies, they are more likely to approve funding
- Strategic Window:
 - After a failed or delayed project delivery—to highlight the cost of inaction
 - When leadership requests better project visibility—as a solution to their problem

Tip: Use data to showcase current inefficiencies and expected improvements with an optimized solution

Capitalizing on Budget Availability

- IT and PMO budgets are often allocated during planning cycles, but unspent funds may be available toward the end of a fiscal year
- If a company has a surplus budget that needs to be used, leaders might be open to quick-win investments
- Strategic Window:
 - Before the fiscal year-end—when departments may have discretionary funds

- During budget planning meetings—to ensure inclusion in the next cycle

Tip: Present the investment as low-risk and high-value, leveraging Microsoft licensing to reduce costs

Responding to Market or Regulatory Changes

- Organizations often modernize when they need to meet compliance standards or adapt to industry shifts
- A shift toward remote work, AI-driven decision-making, or automation mandates presents an ideal moment to justify the need for a modern platform
- Strategic Window:
 - When new compliance or security regulations emerge—as an immediate need
 - After an audit or security review—to address identified gaps

Tip: Show how a Microsoft-based solution ensures compliance, security, and future readiness

IT Rationalization and Tool Consolidation

- Companies often look for ways to reduce IT complexity, tool sprawl, and redundant licenses
- A Microsoft-based project and work management solution can replace expensive standalone PPM tools, leveraging existing Microsoft 365 investments
- Strategic Window:
 - During IT rationalization efforts—when leadership seeks cost reduction
 - When PPM tool contracts are up for renewal—as an alternative investment

Tip: Show how consolidating onto the Microsoft platform lowers total cost of ownership (TCO)

Executive Leadership Changes and New Priorities

1. New executives (CIOs, CTOs, PMO leads, or CFOs) often bring fresh priorities, creating an opportunity to pitch a modern work management approach.
2. If leadership is driving an efficiency or AI-first initiative, project and work management fits naturally into that agenda.
3. Strategic Window:
 - After executive leadership changes—to align with new priorities
 - During corporate restructuring—as a way to drive efficiency and alignment

Tip: Position the solution as a quick win that aligns with leadership's new vision

A leader must be proactive in identifying and capitalizing on strategic windows when leadership is most receptive to funding and resources. The key is to tie the project and work management solution to broader business priorities, ensuring leadership sees it as a strategic enabler, not just another software purchase.

Microsoft and Partner Resources

Many customers rely on Microsoft and the partner ecosystem for solutions to their project and work management challenges. The most successful solutions are typically achieved through symbiotic relationships between the customer, Microsoft, and key partner(s).

Role of the Microsoft Planner (formerly Project) Product Group

The Planner Product Group consists of multiple entities including engineering (they write the code), product management (they drive product direction and integration into Microsoft's business), and Marketing (they manage outward facing interactions & information). Product marketing is the most visible and plays a vital role in driving effective public facing information and communicating product updates. They ensure customers, partners, and Microsoft account teams stay informed and supported during their project and work management modernization journey. Key to this is maintaining a longstanding and vibrant community of

partners and customers, delivering strategic messaging, and providing essential resources, helping all stakeholders successfully adopt Planner and supporting platform technologies.

Role of the Microsoft Account Teams

For enterprise customers, the account teams help customers get the most out of their Microsoft technology investments. Account Executives (AEs) work closely with customers, various Microsoft product groups, and partners on a continuous basis to understand current and future needs, connect with the appropriate expertise (usually partners) to build and maintain specific solutions, and correctly align platform and product licensing accordingly.

Role of Partners

For decades, Microsoft Project (now Planner) partners have served a vital role in helping customers adapt technology to meet their advanced PPM needs. Partners provide a range of services, solutions, and software that augment the Microsoft offerings to ensure solutions are tailored to specific customer needs, are successful, future proof, and sustainable.

As the Microsoft platform and products have changed, the role of the partners has evolved as well. Forward looking partners have embraced Microsoft's vision of a platform-centric approach to PPM. In many cases these partners have leveraged the building blocks (i.e. Power Platform, Copilot, etc.) to accelerate customer project and work management modernization efforts.

Since there is little need for partner assistance in basic Planner adoption, the following is in the context of advanced PPM type scenarios. There are several types of partners that offer often overlapping services, solutions, and software.

1. **Services:** Generally speaking, services include solution planning, configuration & implementation, adoption and change management, support, and future enhancement/expansion (via a roadmap).
2. **Pre-configured solutions:** Typically, code & tables in the form of Power Apps (Power Automate, Power BI, etc.) that can be deployed into the customer tenant that solves gaps in need. These become something that can be maintained locally in the customer environment. Many partners have such 'accelerators' and Microsoft provides one as well.
3. **Software/IP (Intellectual Property):** These are built as separate applications by partners known as ISVs (Independent Software Vendors) and can be either deployed into the customers tenant or stand alone in a separate cloud environment owned and managed by the ISV. Variations exist that customers should be aware of:
 - Overlap or replacement of Microsoft core app functionality – an example would be an ISV app that replaced basic work management or scheduling provided in Planner
 - Customer data resides with the ISV app outside the customer's tenant
 - Customer data resides inside customer's tenant

Below is a graphical view of a multi-step, minimally disruptive approach that leverages partner solutions and IP to evolve from where most organizations are today to a more unified, flexible, AI-enabled, and easily customizable state.

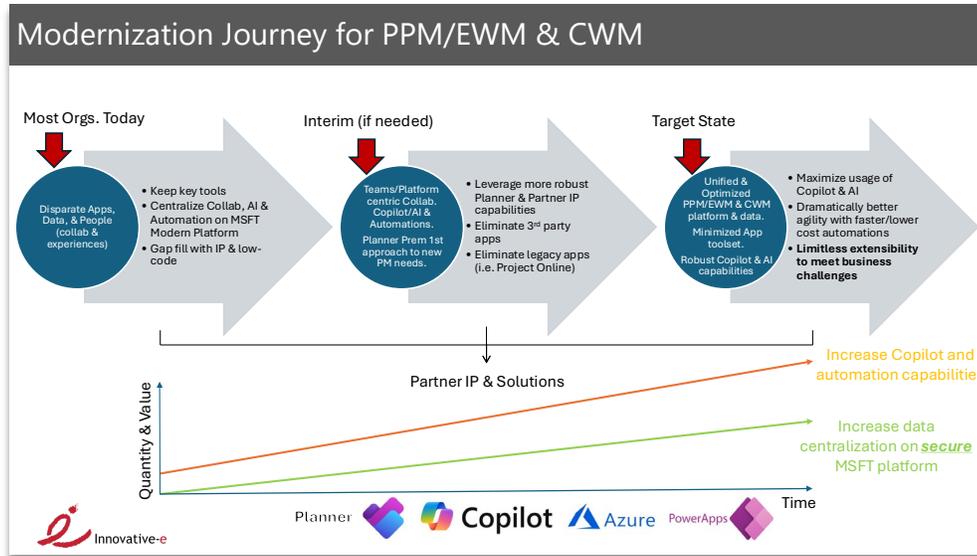


Figure 6 – Possible steps PPM Platform Modernization

There are pros and cons to each partner’s core approach. Customers should understand these differences and determine which is best for their needs both from their PPM solution and IT/Infosec perspectives. Every organization must balance the factors driving the need and timing for PPM modernization vs internal capabilities and budgets.

Tradeoffs: DIY vs. Microsoft Partner

Balancing Time-to-Value and External Investment

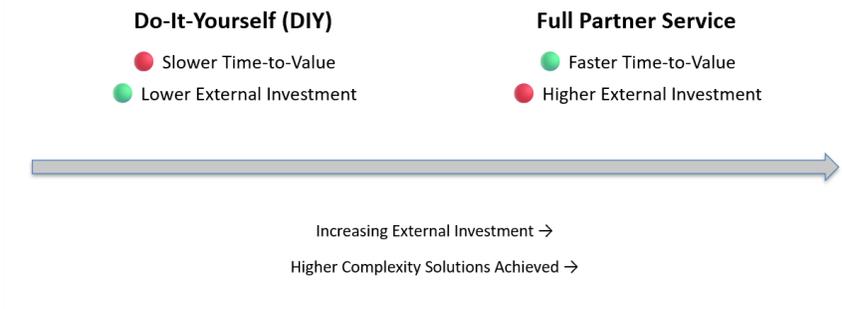


Figure 7 – Balancing External Spend to Value Realization

Real-World Success Stories

The following customers are **at varying stages of their modernization journey, but all have made significant strides towards a unified, platform centric project and work management solution.**

Network Rail: Scaling with the Power Platform

Network Rail leveraged Power Apps and Power Automate to modernize project management workflows. The solution scaled cost-effectively across regions, enabling consistent processes and improved decision-making. ([Network Rail - Corporate Project Solutions](#))

His Majesty's Prison and Probation Service: From Request to Delivery using Power Platform

His Majesty's Prison and Probation Service embarked on a transformative journey, aiming to create a Project triage tool integrated into Microsoft Project for the web (Pftw / Planner). The primary objective was to develop an automated process for identifying and approving project requests, seamlessly transitioning them into active projects within their lifecycle. Initially, the focus was on streamlining the submission, approval, and conversion of project requests. This process was pivotal in ensuring that approved projects were accurately reflected within the Project for the web / Planner model driven app, leveraging accelerators. As the project evolved, additional types of requests were incorporated utilizing Agile delivery. Collaborating with CPS, His Majesty's Prison and Probation Service broadened across the Power Platform, to incorporate handling other types of requests: Single Point of Contact (SPOC), pilot groups, focus groups, and data requests. This expansion not only broadened the tool's scope by leveraging Canvas Apps into a single gateway, providing end-users with a unified platform for submitting all types of requests. ([His Majesty's Prison and Probation Service - Corporate Project Solutions](#))

Carolinas Telco: Unifying Microsoft tools into a seamless solution

To support its focus on both customer-facing innovation and internal efficiency, Carolinas Telco Federal Credit Union modernized its project management approach. Outgrowing a basic third-party task management tool, they needed a more cohesive, data-driven solution. By adopting Teams4PM, built on Microsoft Teams and Power Apps, they streamlined collaboration, improved visibility, and established a single source of truth for project data. This shift not only reduced manual workarounds but also enabled more responsive, informed decision-making. [Watch the video case study.](#)

SNHU: Combining Project Management with Microsoft Innovation to Drive Strategic Impact at SNHU

Southern New Hampshire University (SNHU) partnered with Innovative-e to modernize and unify its fragmented project management approach using Microsoft's secure, cloud-based platform. By implementing a suite of tools—including Power Platform, Teams, Project Online, and Planner—within Innovative-e's AI-powered Teams4PM solution, SNHU transformed how projects are managed and aligned with institutional goals. The centralized platform delivered measurable improvements in efficiency, visibility, and collaboration, enabling real-time insights, streamlined project intake, and improved capacity management. With integrated AI and analytics through Power BI, SNHU is now positioned to prioritize initiatives more effectively, measure outcomes, and drive future growth with confidence. [Microsoft Partner Spotlight: Innovative-e transforms organizational management with Microsoft Teams.](#)

Conclusion

Modernizing your project and work management estate is more than a technology upgrade—it's a strategic imperative to thrive in a rapidly evolving digital landscape. By shifting to a unified, Microsoft-centric platform approach, organizations will eliminate their dependence on legacy tools like Microsoft Project Online and remove costly, fragmented third-party SaaS solutions that hinder collaboration, inflate costs, and disperse critical data. The Microsoft ecosystem, enriched with transformative AI capabilities like Copilot and Agents, enables organizations to unlock unprecedented productivity, streamlined decision-making, and intuitive user experiences. Leveraging this powerful combination of Teams, Power Platform, and integrated AI empowers project managers, citizen developers, and executive stakeholders alike, fostering agility, efficiency, and continuous innovation. Acting now to adopt this modern, AI-driven platform-first approach will empower your organization to address current challenges, unifying experiences, streamlining collaboration, and elevating organizational performance—resulting in more engaged, productive, and satisfied people.

Next Steps

Contact us to explore how we can help your organization transition to a modern Microsoft project management estate and achieve your business goals.

For UK and EU, contact CPS: hello@cps.co.uk

For the Americas, contact Innovative-e: info@innovative-e.com

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Other Resources

- Official Microsoft Project Online retirement announcement: [Microsoft Project Online is retiring: What you need to know | Microsoft Community Hub](#)
- Great whitepaper by Microsoft about App Modernization: [Application modernization with Power Platform - Power Platform | Microsoft Learn](#)
- Microsoft Planner website: [Microsoft Planner | Daily Task and Work Management](#)
- All the latest on Microsoft Planner: [Category: Planner | Microsoft Community Hub](#)
- Planner partner locator: [Modern Work for Partners - Microsoft Planner Partner Locator](#)
- Innovative-e website: <https://www.innovative-e.com>
- Innovative-e Microsoft Partner Spotlight: <https://innovative-e.com/partner-spotlight>
- CPS website: [CPS: Going Beyond Technology](#)
- Teams4PM website: <https://www.teams4pm.com>