October 2023

The Next Generation of Microsoft PPM

Helping you choose the best PPM for your business.

Sensei
Improving *the way you work*

Author: Marc Soester, Executive Director, Sensei

Contents

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 are 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 professional report provides an in-depth exploration of Microsoft's PPM toolkit, guiding organisations to make informed decisions when selecting the most suitable tools. Key factors for consideration include identifying organisational needs, methodology compatibility, user proficiency, resource management, alignment with IT strategy, timesheet data capture, change management, governance, 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 tactical work management, strategic project 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 citizen 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.

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.

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**
Project Online is a comprehensive Enterprise Project Management Solution offering features for collaboration, global resource management, demand management, project management, timesheets, and enterprise reporting. It includes support for additional processes such as risk, issue, change request, and document management. While Microsoft's focus is shifting away from Project Online due to the emergence of low-code technology, it remains available until at least 2027, making it a viable option for existing users.

2 **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.

3 **Microsoft Project for the Web**
Microsoft Project for the Web is designed to cater to both professional project managers and those with varying levels of experience. It focuses on scheduling and basic customization 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 simpler customization needs.

4 **Microsoft Planner**
Microsoft Planner is a task management tool with a user-friendly interface, suitable for lightweight projects. While it's not a full PPM solution, it integrates seamlessly with Microsoft Teams and provides an intuitive experience, making it ideal for non-project managers or those managing simple projects.

5 **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.

6   **Microsoft Dynamics Project Operations**
Microsoft Dynamics Project Operations is part of the Microsoft Dynamics 365 suite and focuses on 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.

7   **Altus**
Altus is a preferred Microsoft PPM solution that consolidates Microsoft scheduling tools and integrates with others like Jira. It aligns work to strategy and people to purpose, offering three tiers for different project management needs. Altus maximizes Microsoft investments and provides a consistent user experience for managing all initiatives strategically.

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.
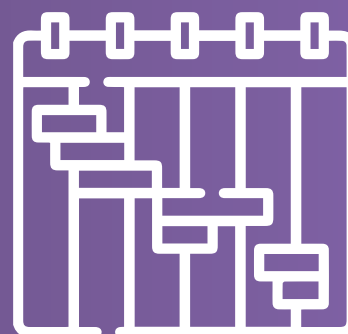
02
Introduction

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

Microsoft Project for the Web

Microsoft Planner

Microsoft DevOps

Microsoft Dynamics Project Operations and

Altus, a Microsoft preferred PPM Solution

PPM FULFILS 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'. Project Portfolio Management (PPM) solutions and Work Management solutions serve different yet similar purposes, addressing different needs in managing work and projects.

Project 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.

Work Management

Work Management solutions enhance the productivity and efficiency of individuals and teams by organising tasks, managing resources, and facilitating collaboration. These systems managing 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.

PPM solution is therefore strategic, while Work Management solution is tactical.

Doing the right work

In a ship voyage, you need a map. Likewise, organisations have goals. To reach them, use a "Work Intake Funnel." How to choose projects? Think of it like triage, focusing on aligned, less constrained ones. Ask, "Does this get us closer to our goals?" Prioritise based on value to find opportunities. Focus on high-impact, low-risk efforts for efficiency and transformation.

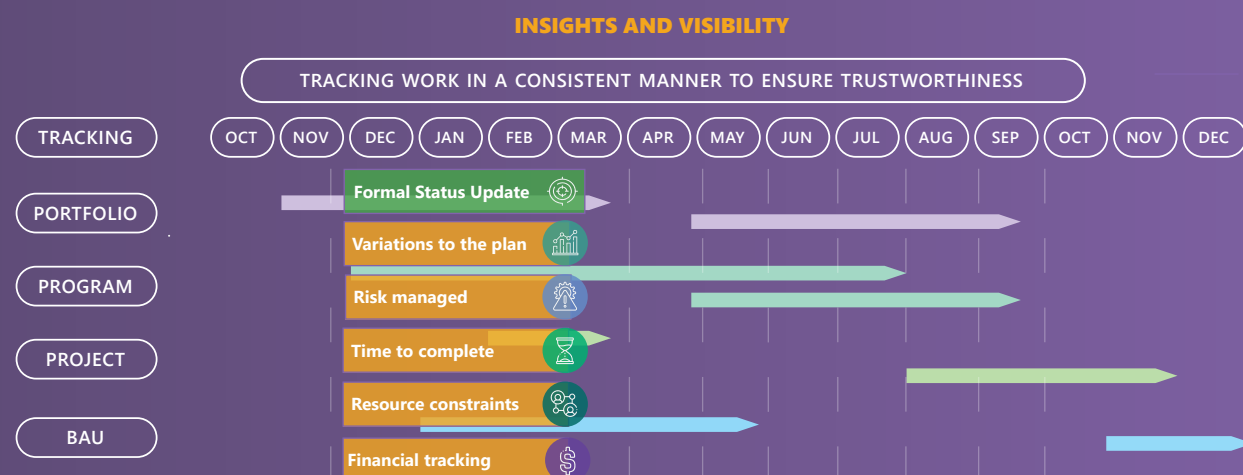Sail with the right priorities and team to reach your goals. Welcome aboard the vessel of success!

DOING THE RIGHT WORK

ORGANISATION

| STRATEGIC GOALS | MEASURABLE | TARGET VALUE & TIME |

FINDING MOST EFFECTIVE WAY TO DETERMINE THE PATH ACCOMPLISHING YOUR STRATEGY

| PROJECTS | OPERATIONAL WORK | PROGRAMS | PORTFOLIOS |

ORGANISATIONAL CONSTRAINTS

| FINANCIALS | TIME | RESOURCES | RISKS |

WORK INTAKE FUNNEL

| IDEATION | OPERATIONAL WORK | BUSINESS CASES | INITIATIVES |

Doing the work right

As the captain, you've carefully selected your crew for the grand adventure. Now, it's time for the journey itself. Every move you make matters. To stay on course, you need a reliable compass and clear skies for consistent progress tracking. Your crew shares updates at the helm to keep you informed. Success depends on both your initial choices and how you manage each step. Success lies in meticulously managing every step of the way. Here's to the exciting journey of strategic execution!

DOING THE WORK RIGHT

INSIGHTS AND VISIBILITY

TRACKING WORK IN A CONSISTENT MANNER TO ENSURE TRUSTWORTHINESS

TRACKING | OCT NOV DEC JAN FEB MAR APR MAY JUN JUL AUG SEP OCT NOV DEC

PORTFOLIO — Formal Status Update
PROGRAM — Variations to the plan / Risk managed
PROJECT — Time to complete
BAU — Resource constraints / Financial tracking

A sophisticated PPM solution should encompass both, **Project Portfolio Management** - *Doing the right work*. And **Work Management** - *Doing the work right*.

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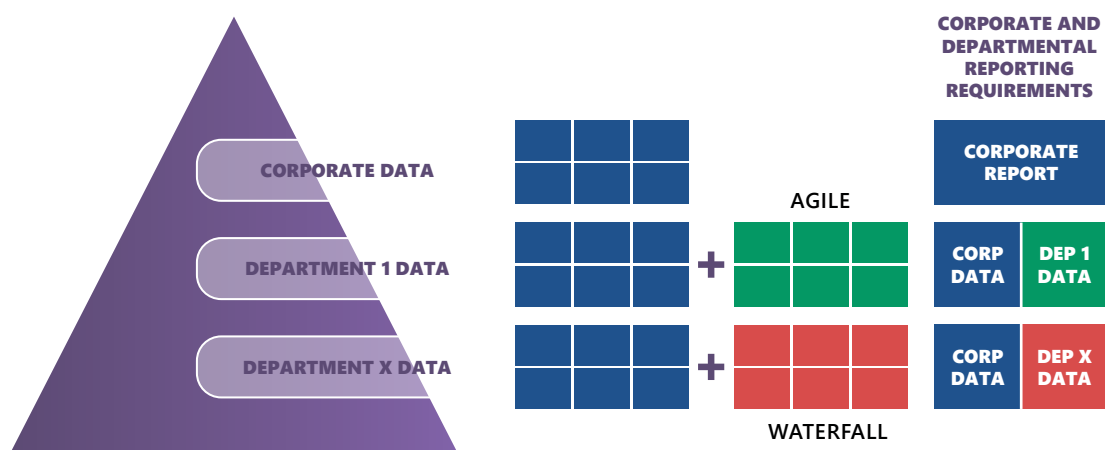
Industry standards are essential if a PPM solution is to become a core pillar of your organisation. After all, a PPM solution supports strategic goals execution. As such, Microsoft-based PPM and Work Management solutions are compared on base features and functions expected from every PPM solution.

- **Centralised Project Data**: PPM tools provide consolidated views of all project data, making understanding easier of the overall health and status of each project within a portfolio.

- **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 towards 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 strategic organisational 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. (The 'new kid on the block'.)
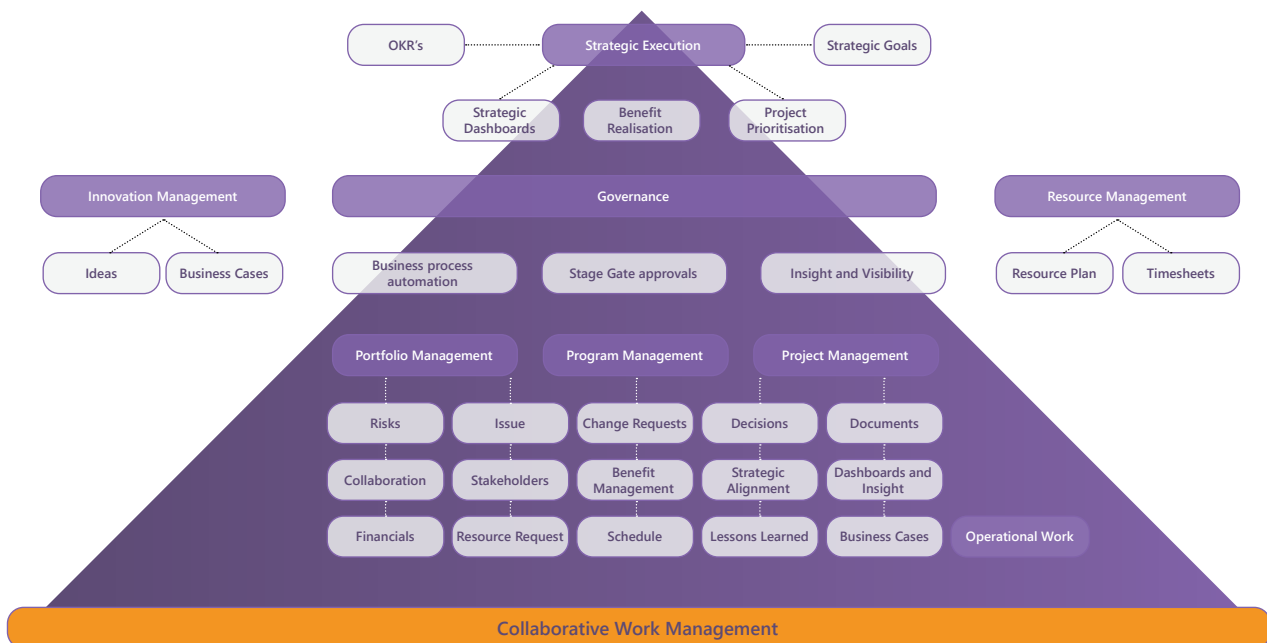
Adaptive Project Management & Strategic Portfolio Management

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

Project Online is Microsoft's long-standing Enterprise Project Management Solution. Working in collaboration with MS Project Desktop, project online is an industry heavyweight. However, in 2019 Microsoft announced that Project Online will no longer be enhanced due to the emergence of 'no code – low code' technology.

Project Online is a complete system which includes Collaboration (using SharePoint Sites), Global Resource Management, Demand Management, Project Management, Timesheets, Enterprise Reporting) and supports other processes including Risks, Issues, Change Requests, and document management. A big plus of Project Online is Microsoft's Project Desktop, a tool allowing project planning and scheduling (note that Project Desktop is a scheduling tool **only**).

Project Online is obsolete

Based on the new Microsoft Power Platform technology, Microsoft Project for the Web represents a move into the cloud. **Microsoft Project for the Web** and the **Microsoft Power Platform** effectively supersede Project Online. The Microsoft Power Platform enables business process digitisation in a no-code 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 Altus. Altus is a Microsoft-preferred PPM solution, building on all Microsoft schedule tools within the Microsoft Power Platform.

MICROSOFT IS THE ARCHITECT:
ALTUS IS THE INTERIOR DESIGNER.

Microsoft has not officially retired Project Online, with the solution available until at least 2027. This leaves ample time for identifying a suitable Partner Solution. Microsoft recently introduced a notification within Project Online encouraging users to try Project for the Web.
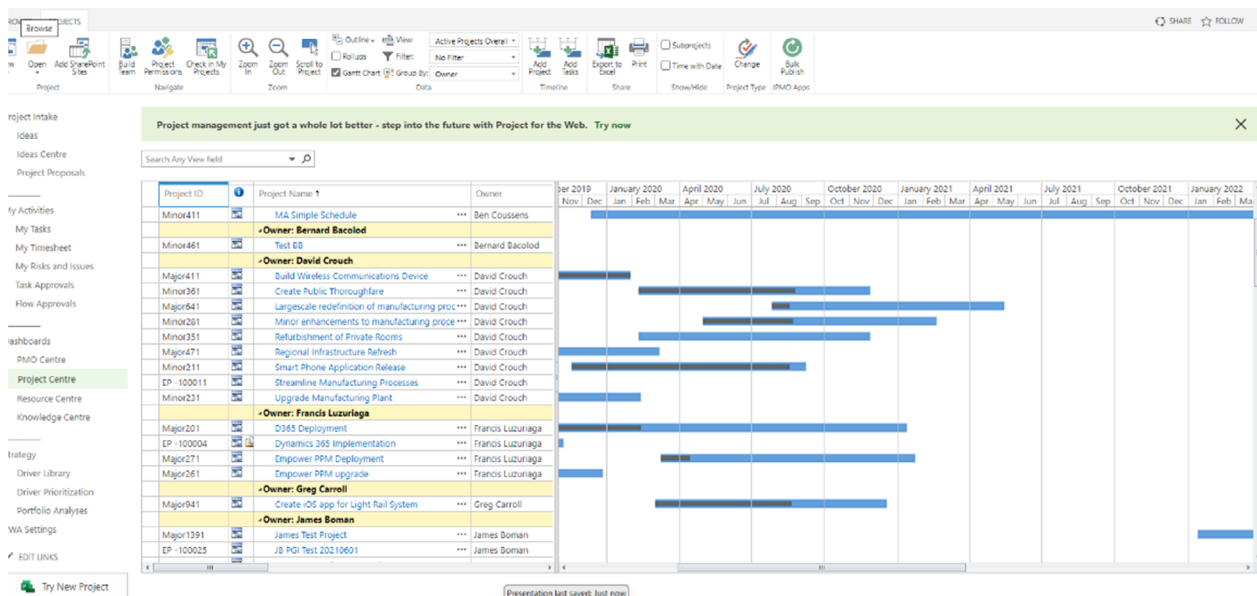

THOSE DEPENDING ON PROJECT ONLINE AND COMFORTABLE WITH THE END OF DEVELOPMENT CAN REMAIN ON THE PLATFORM. BE AWARE THAT END-OF-SUPPORT WILL COME AS MICROSOFT INNOVATES AND DEVELOPS PROJECT FOR THE WEB AND THE POWER PLATFORM

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 artifacts and has become one of the project manager's most loved or hated tool (depending on the level of scheduling experience).
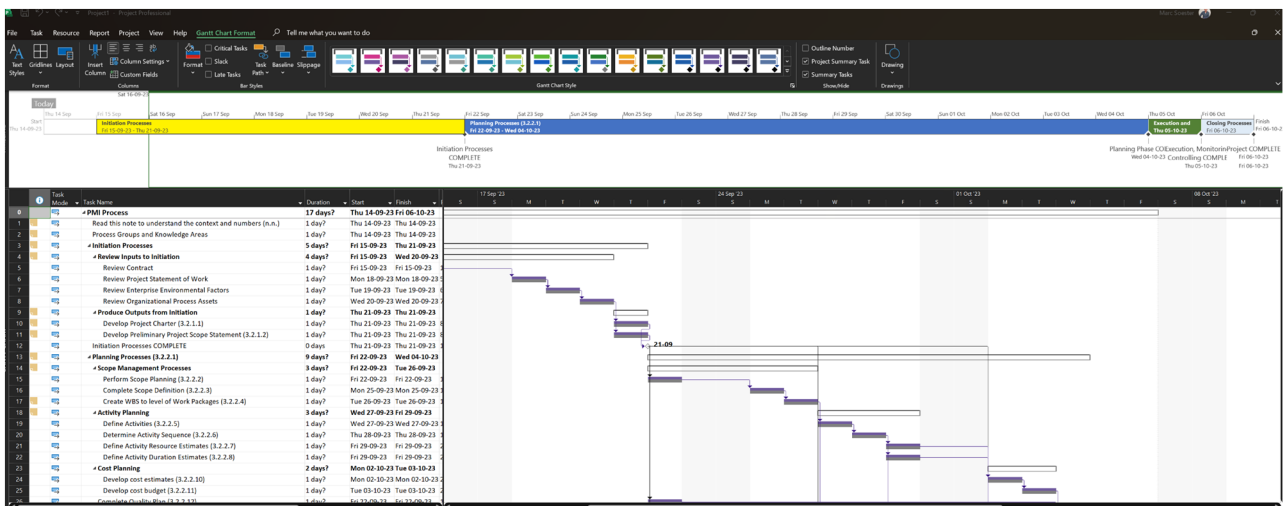
Microsoft team has delivered rich schedule capabilities, including Agile Kanban boards. However, from an organisational perspective one of the great assets of Project Desktop is its combination with Microsoft Project Online, allowing an overview of all projects.

However, Project Online's big negative is that Project Desktop is its **only** schedule tool. The combination of Project Desktop and Project Online is for *professional project managers*.

As outlined, there are many schedule tools available, with multiple ways of scheduling and managing tasks. The big challenge is bringing it all together, both for Microsoft and for organisations running a projects portfolio.

Recognising the challenge, Altus offers a seamless integration of schedule tools into a comprehensive Project Portfolio Management Solution.

MICROSOFT PROJECT DESKTOP STRENGTH AND WEAKNESS

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.

- Works offline, so users manage projects internet access.

- 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 leading project update delays.

- Cost a deterrent for smaller organisations or individual users.

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 PROJECT FOR THE WEB AND PLANNER, IT IS A SCHEDULE TOOL ONLY, NOT A PROJECT PORTFOLIO SOLUTION. MICROSOFT HAS MADE CLEAR PROJECT DESKTOP IS HERE TO STAY.

Microsoft Project for the Web

Microsoft Project for the Web is not a PPM solution, but a schedule tool for users who don't need a sophisticated schedule engine like Microsoft Project Desktop. Project for the Web recognises that every organisation has varying project management experience and capabilities – from the professional project manager, to the 'citizen project manager'. Microsoft itself notes that 80% of Project Desktop users are overwhelmed; it is these users for whom Project for the Web is designed.

Grid View

Gantt Chart view

Board view
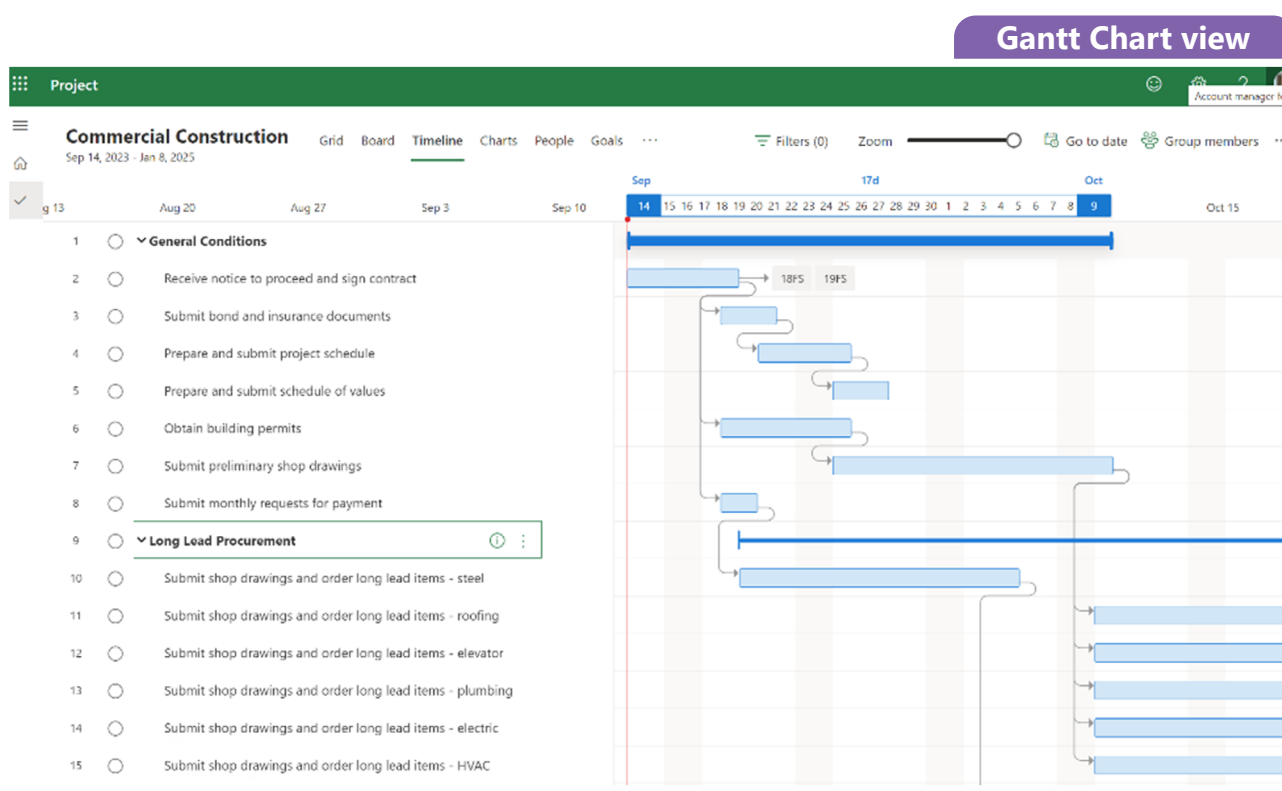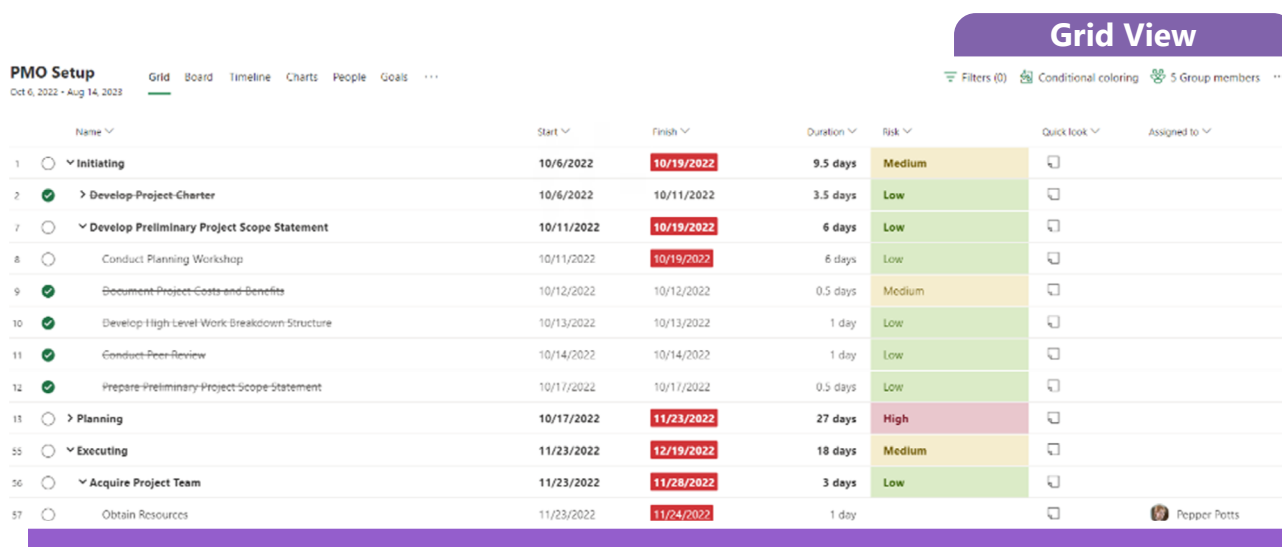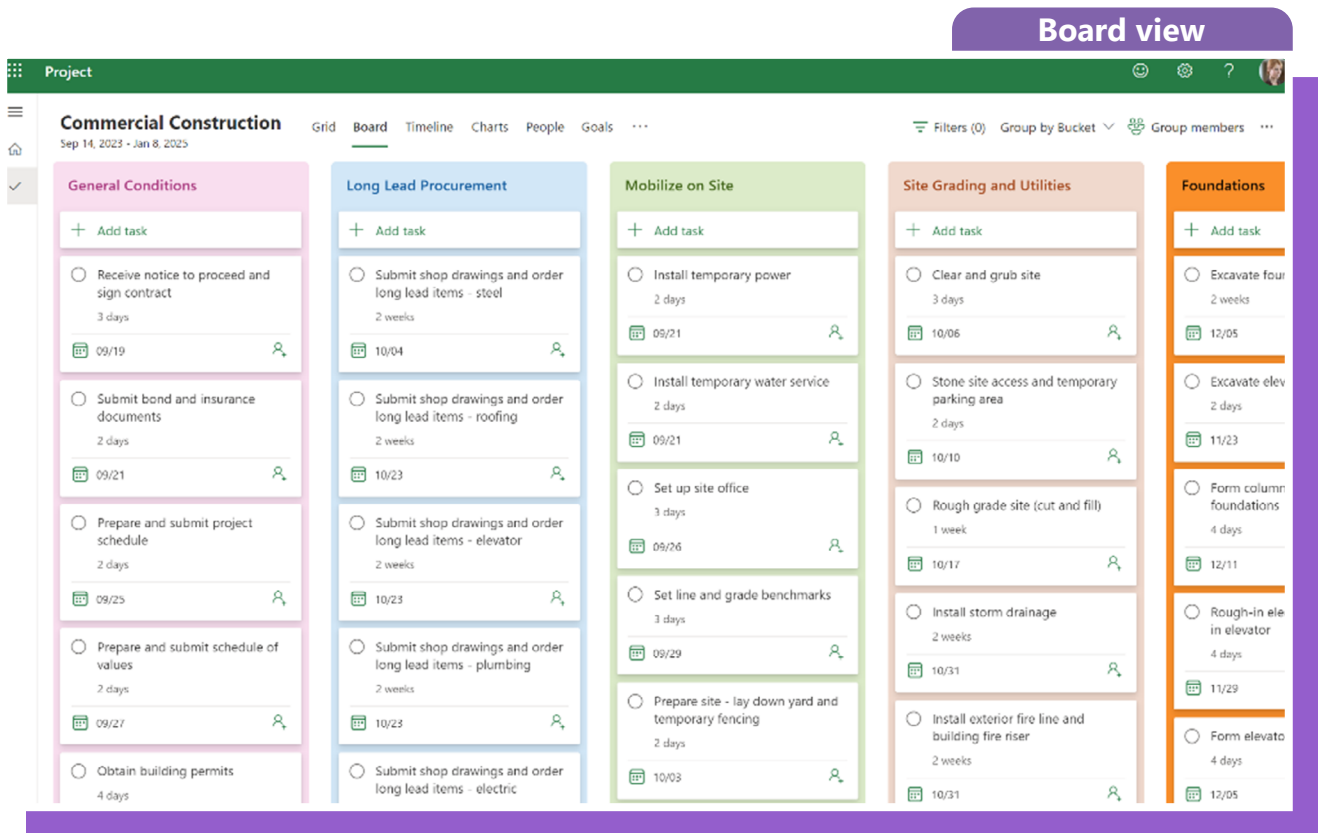
Released in 2019, new features and capabilities are continually developed for Project for the Web. While not as comprehensive as Project Desktop, it is an intuitive and easily understood schedule tool which (crucially) works with Microsoft Teams.

Combined with Power Platform, Project for the Web enables creation of sophisticated PPM tools – but consider the cost of maintenance and enhancements. A partner solution like Altus delivers one such toolset, at a fraction of the cost of internal development.

Reports can be created against Project for the Web data storage of using Microsoft Dataverse[1], delivering a consolidated view of all Project for the Web projects.

There are limitations. Users are limited to Project for the Web schedule capability, while different maturities and methodologies require different execution (schedule) tools. This becomes an issue with proper global resource management.

Altus has resolved the issue with a global resource pool enabling resource management across **all schedule tools**.

Project for the Web is an exciting and eminently *useable* solution. We recommend watching this space.

PROJECT FOR THE WEB STRENGTH AND WEAKNESS

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).
- Cloud architecture for real-time updates and anywhere access.
- Data is stored in Microsoft Dataverse, the database for Microsoft PowerApps. Makes Project for the Web extensible.

Weaknesses

- Limited functionality compared to Microsoft Project Desktop, especially in terms of advanced project scheduling, amount of tasks, reporting.
- Missing features like Baseline and Custom Templates - may not meet the needs of users managing complex projects. (Microsoft is addressing these gaps).
- Limited customisation options may restrict its adaptability to specific project needs or unique workflow requirements.
- Absence of advanced features and customisation may require more sophisticated project management solutions.
- Project for the Web is solely a scheduling and requires Microsoft Power Platform for added functionality.

PROJECT FOR THE WEB IS A SCHEDULE TOOL AND NOT AN END-TO-END PROJECT PORTFOLIO MANAGEMENT SOLUTION. IF MANAGING PROJECT SCHEDULES ONLY IN COMBINATION WITH RESOURCE MANAGEMENT AND SIMPLE CUSTOMISATION, PROJECT FOR THE WEB IS FOR YOU.
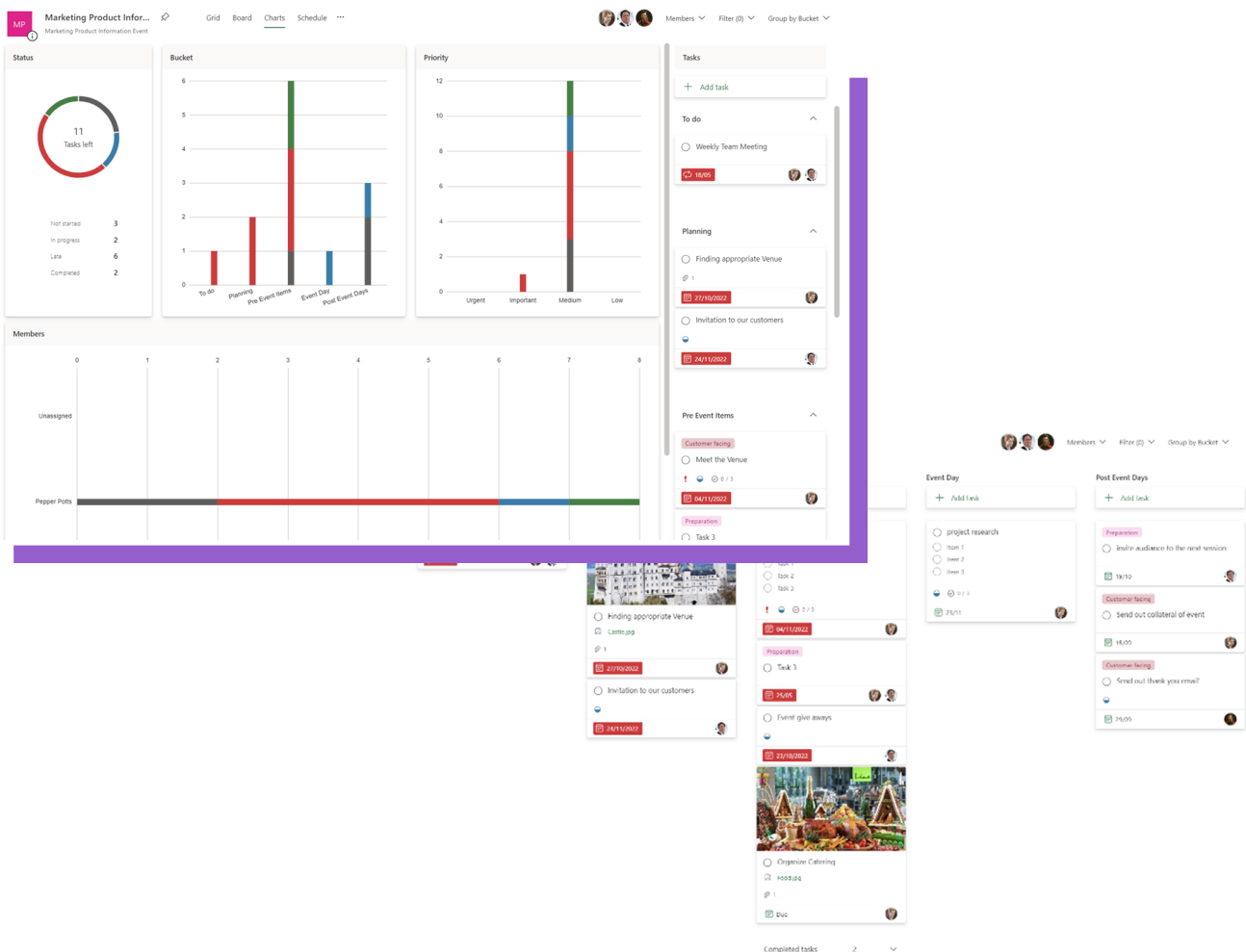
Microsoft Planner

Microsoft Planner is a low-maturity task management tool enabling citizen project managers to manage 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 Project for the Web 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.

PLANNER STRENGTH AND WEAKNESS

Strengths

- Intuitive user-friendly interface, creating and managing tasks is easy even for the tech-challenged.
- 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 co-author 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 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.
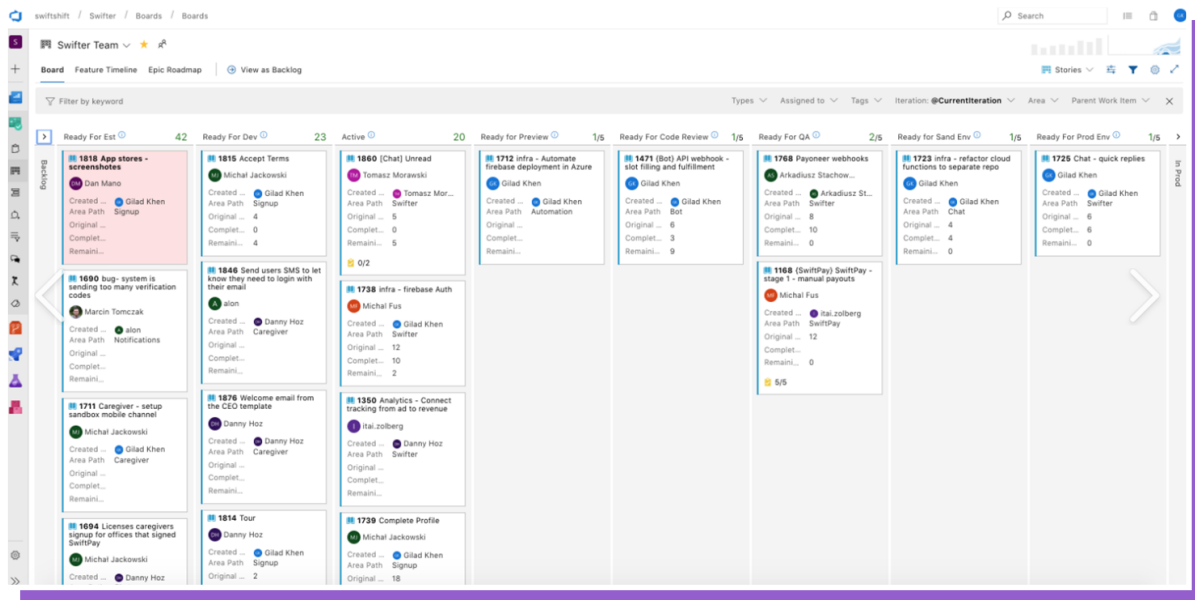
DevOps is not suited to waterfall projects. It is a powerful development and scrum master management tool focused on the Agile methodology.

With Agile a popular methodology for IT project management, DevOps has become highly popular, offering SAFe[2] digitisation which is a popular way of managing Agile Projects, Portfolios, and enterprise business agility.

---

2   https://scaledagileframework.com/

DEVOPS STRENGTH AND WEAKNESS

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.
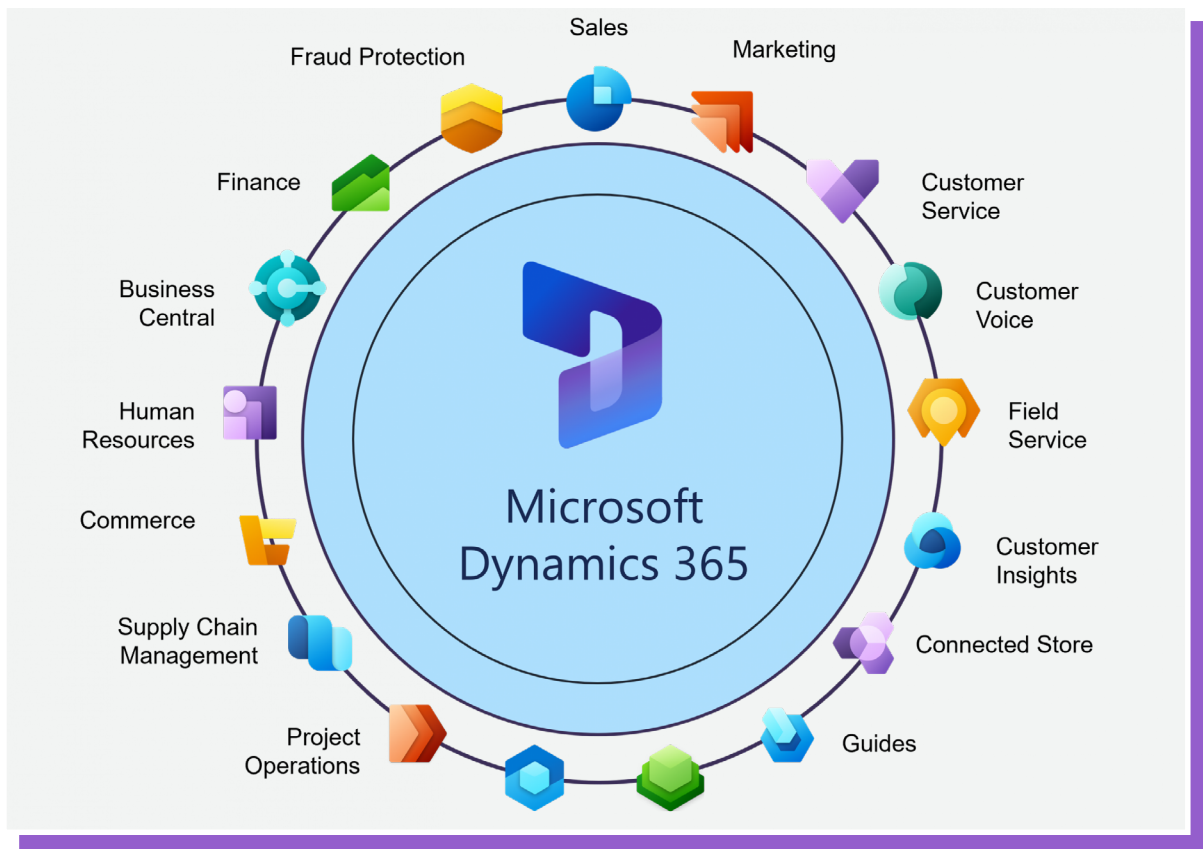
Microsoft Dynamics Project Operations

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 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.

As it is part 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 Microsoft Power Platform. However, one limitation is scheduling, which is performed in Microsoft Project for the Web – which is incorporated as the Dynamics schedule tool.
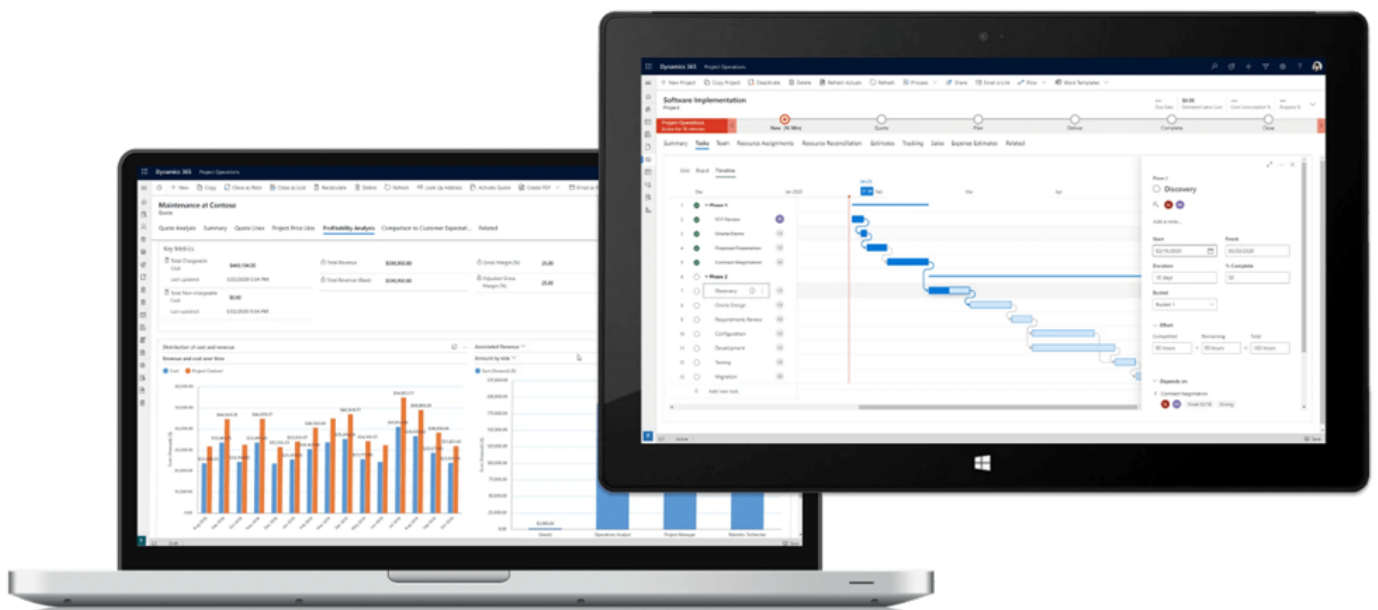
DYNAMICS PROJECT OPERATIONS STRENGTH AND WEAKNESS

Strengths

- Integrates well with various Microsoft products.
- Offers strengths catering to project-based businesses.
- Unified and versatile solution combining project management, resource scheduling, time and expense management, and finance capabilities, managing project operations 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 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 buisness 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 limiting its accessibility for companies with tighter budgets.
- Integration challenges outside the Microsoft ecocystem.
- Customisation options may be limited.
- Deployment and maintance requires specialist people.
- Updates and change freqyency can be disruptive.
- User interface can be challenging, with cumbersome navigation.
- Some configurations have performance issues (slower load times and responsiveness).

Altus – A Microsoft-Preferred PPM Solution

Altus is a Microsoft-preferred Project Portfolio Management solution aligning 'work' to 'strategy' and 'people' to 'purpose'. Altus enables doing **the work right** and doing **the right work**. By combining all Microsoft schedule tools (and others, like Jira), Altus is a consolidated solution providing overall 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.

Altus is divided into 3 distinct tiers, providing a tool for everyone from the citizen 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 projects management with all methodologies and all project management maturity levels. It provides a classical Work Management.

- **Altus Portfolio** enables programs and portfolio management with a Global Resource pool. Resources are an organisational constraint to be managed against the work required. Building Portfolios to achieve Strategic Goals is a key capability in Altus Portfolio.

- **Altus Strategy** enables executive planning across all activities required to fulfil strategic organisational objectives, while exposing, understanding, and managing risk.

Project

Information Worker

Citizen Project Manager

Professional 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
- » Project Priorisation
- » OKR's

Altus maximises Microsoft investments. Built on the Microsoft 365 technology, Altus uses Microsoft building blocks to manage all initiatives in an effective and sophisticated manner.
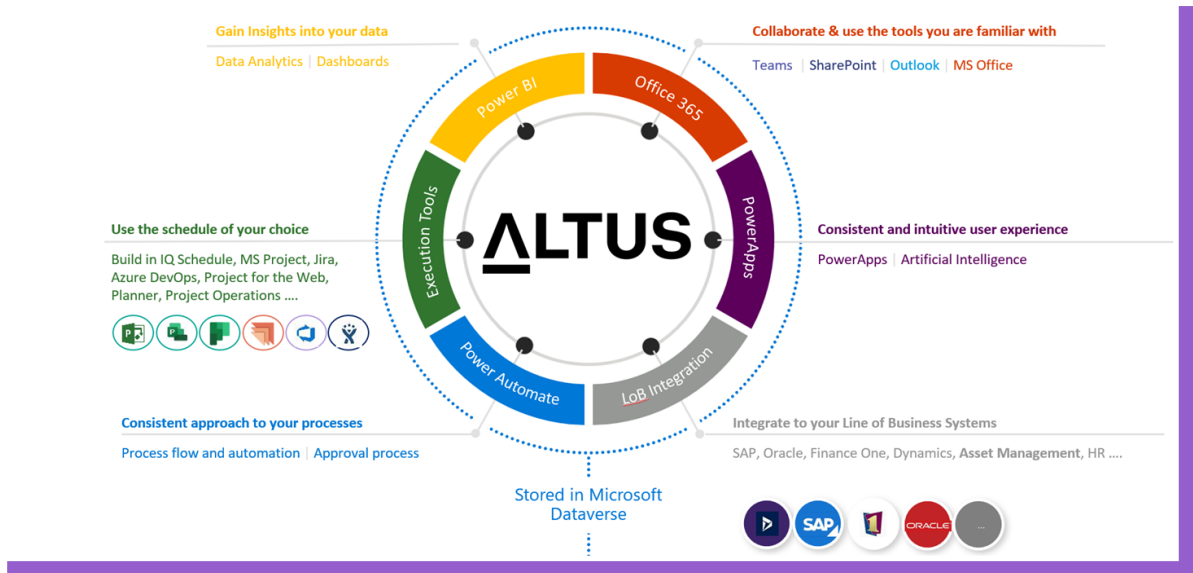
Providing a consistent user experience AND seamlessly integrating with all the Microsoft tools described above allows for a 100% user adoption strategy across **all** maturity levels and **all** methodology levels.

The screen above outlines the "one stop shop" for an individual managing all elements of a project. By using Microsoft Power, 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 the current state. With accurate and immediate insights, stay on top of every project, take targeted action early, and help drive consistent success from every initiative. Altus seeks to shed light on the future of every project, giving senior and executive management insights to move forward with confidence.
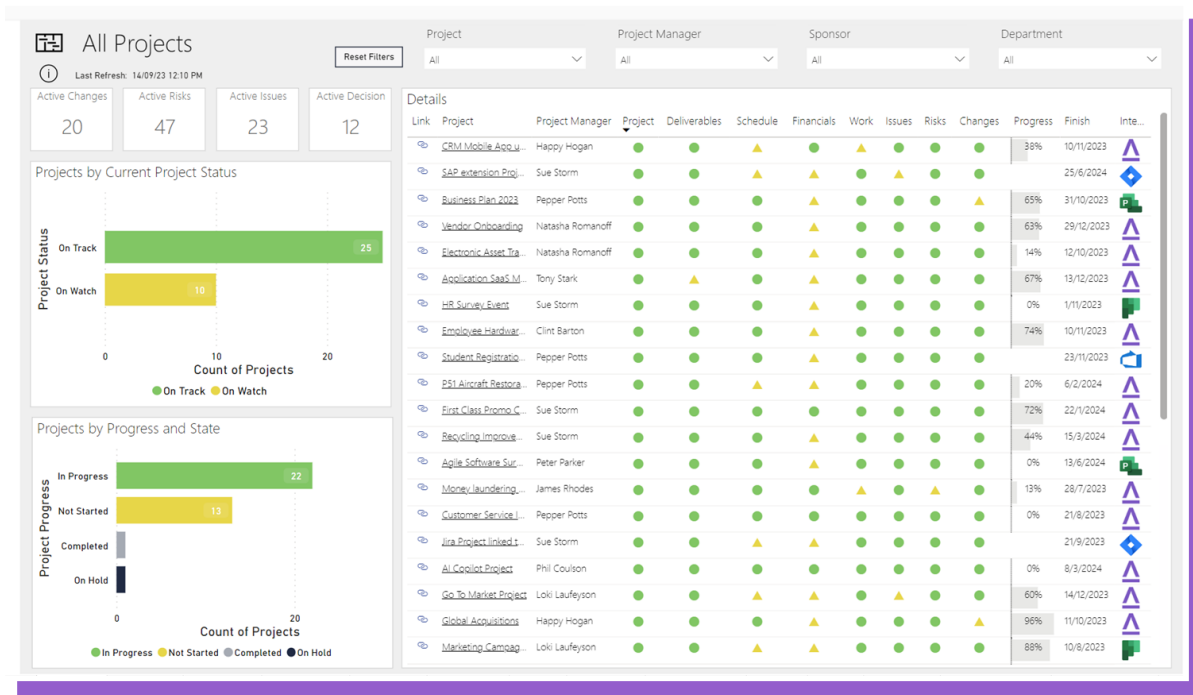
From a list of all actual projects and their KPI performance, to a consolidated Portfolio view, Altus delivers insights that inform data-driven decisions.
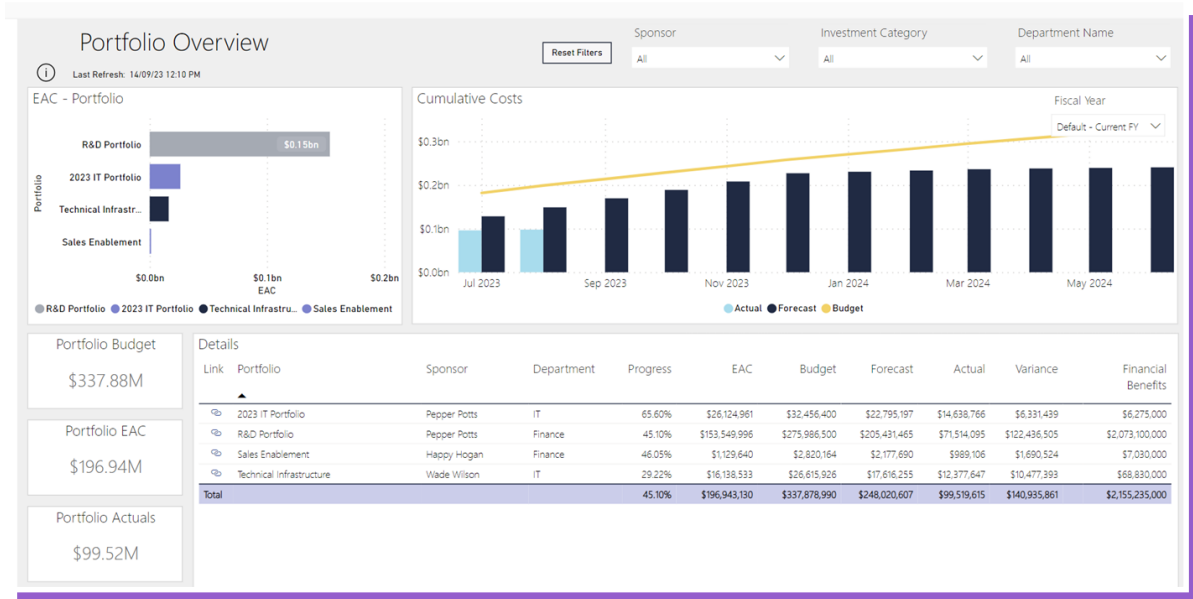
Altus enables "doing the right work" with prioritisation based on organisational-specific scores. An easily maintained user experience enables senior and executive managers to determine the most effective collection of initiatives which should be advanced to the anticipated outcome, supporting strategic goals.

Compare Benefit vs Cost ratio or Return-on-Investment comparison.
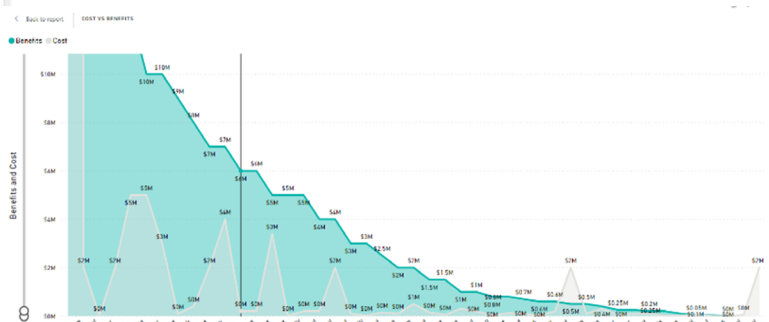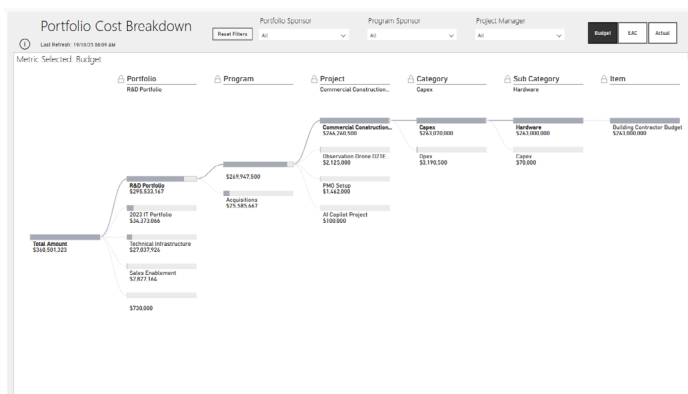
Altus combines the data of Work Management and Project Portfolio Management into one overarching solution for a 100% user adoption strategy. New users are inducted with training integrated directly into Altus, ref image below.

ALTUS
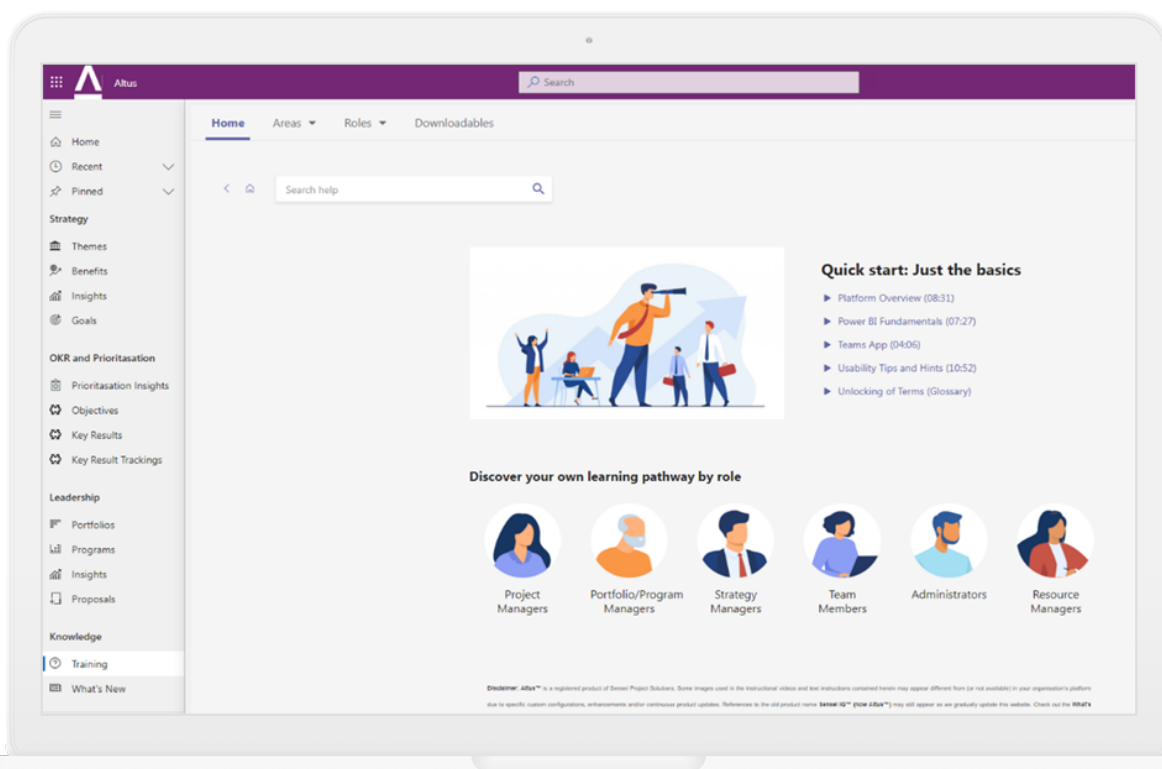
ALTUS STRENGTH AND WEAKNESS

Strengths

- ✓ Seamlessly integrates all elements of Microsoft 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.

- ✓ Automates business processes for consistent and reliable data.

- ✓ Supplied with standard reports and dashboards, eliminating manual reporting.

- ✓ 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 strtegy execution.

- ✓ Built in industry standards and best practices.

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, Project for the Web, and Planner. Implementation optimal when these applications are already in use.

- ✓ Robust change management, clearly delineated processes, and stringent 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 to digitise 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.

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.

✅ Yes   ❌ No   ➖ Partially

Description	Project Online	Project Desktop	Project for the Web	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 artifacts 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	Project Online	Project Desktop	Project for the Web	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.

Description	Project Online	Project Desktop	Project for the Web	Planner	DevOps	Dynamics Project Operations	Altus
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.

Description	Project Online	Project Desktop	Project for the Web	Planner	DevOps	Dynamics Project Operations	Altus
Managing a Global Resource pool	✅	⚠️	✅	❌	❌	✅	✅
Project Manager requesting resources	❌	❌	✅	❌	❌	✅	✅
Resource Managers approving resources	❌	❌	✅	❌	❌	✅	✅
Managing resource calendars	✅	⚠️	✅	❌	❌	✅	✅

Description	Project Online	Project Desktop	Project for the Web	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	Project Online	Project Desktop	Project for the Web	Planner	DevOps	Dynamics Project Operations	Altus
Paginated Reports	❌	❌	❌	❌	❌	❌	✅
Centralised data model	➖	❌	❌	❌	❌	✅	✅
Usage PowerBI	➖	❌	❌	❌	❌	✅	✅
Usage 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 organization.

	Project Online	Project Desktop	Project for the Web	Planner	DevOps	Dynamics Project Operations	Altus
Managing Strategic Goals	❌	❌	❌	❌	❌	❌	✅
OKR (Objectives Key Results)	❌	❌	❌	❌	❌	❌	✅
Benefit Realisation	❌	❌	❌	❌	❌	❌	✅
Strategic Reports and Dashboards	❌	❌	❌	❌	❌	❌	✅

Demand Management and prioritization

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

	Project Online	Project Desktop	Project for the Web	Planner	DevOps	Dynamics Project Operations	Altus
Project Prioritisation	✅	❌	❌	❌	❌	❌	✅
Ideation	❌	❌	❌	❌	❌	❌	✅
Business Cases / Proposals management	➖	❌	❌	❌	❌	✅	✅

Description	Project Online	Project Desktop	Project for the Web	Planner	DevOps	Dynamics Project Operations	Altus

Timesheet Management

The ability to capture all actual work against tasks assigned to a user.

Description	Project Online	Project Desktop	Project for the Web	Planner	DevOps	Dynamics Project Operations	Altus
Creating and maintaining timesheets	✅	❌	❌	❌	❌	✅	✅
Timesheet approval / rejection process	✅	❌	❌	❌	❌	✅	✅
Task update to schedule (where possible)	✅	❌	❌	❌	❌	✅	✅
Timesheet reports and dashboards	❌	❌	❌	❌	❌	✅	✅

Automation of Business Processes

The ability to reduce administrative overhead and governance to digitise business processes ensuring a consistent and trustworthy approach to work management.

Description	Project Online	Project Desktop	Project for the Web	Planner	DevOps	Dynamics Project Operations	Altus
Stage Gate approvals	➖	❌	➖	❌	❌	✅	✅
Check lists	➖	❌	➖	❌	❌	✅	✅
Approval workflows	➖	❌	➖	❌	❌	✅	✅
Governance Reports	➖	❌	➖	❌	❌	✅	✅

Document Management

The systematic process of capturing, organising, storing, and retrieving digital and paper documents.

Description	Project Online	Project Desktop	Project for the Web	Planner	DevOps	Dynamics Project Operations	Altus
Document Storage	✅	❌	✅	✅	❌	✅	✅
Document Version Control	✅	❌	✅	✅	❌	✅	✅
Document sign off	✅	❌	✅	✅	❌	✅	✅

Description	Project Online	Project Desktop	Project for the Web	Planner	DevOps	Dynamics Project Operations	Altus
Program & Portfolio Management							
The ability to manage Programs							
Portfolio top-down planning	❌	❌	❌	❌	❌	❌	✅
Program top-down planning	❌	❌	❌	❌	❌	❌	✅
Portfolio management	❌	❌	❌	❌	❌	❌	✅
Program management	✅	❌	❌	❌	❌	❌	✅
Portfolio Financial Planning	❌	❌	❌	❌	❌	❌	✅
Program Financial Planning	❌	❌	❌	❌	❌	❌	✅
Portfolio Risks and Issues Management	❌	❌	❌	❌	❌	❌	✅
Portfolio Risks and Issues Management	❌	❌	❌	❌	❌	❌	✅
Portfolio Key date management	❌	❌	❌	❌	❌	❌	✅
Program Key date management	❌	❌	❌	❌	❌	❌	✅
Portfolio Reporting	❌	❌	❌	❌	❌	❌	✅
Program Reporting	❌	❌	❌	❌	❌	❌	✅
Collaboration							
Most PPM tools come equipped with collaboration features, facilitating communication among team members, stakeholders, and executives.							
Team Collaboration (using Microsoft Teams)	❌	❌	✅	✅	❌	✅	✅

05
Recommendation and Conclusion

With a comprehensive review of the tools Microsoft provides for project and portfolio management, selecting the most appropriate tools becomes easier. Ensure 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.

Methodology Compatibility
Evaluate whether you require distinct 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 Citizen 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 disparate resources effectively.

Alignment with IT Strategy
Ensure a choice coherent with IT strategy, especially if it is oriented towards Microsoft 365 solutions.

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 can cause 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 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").

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.

Sensei

Improving *the way you work*