CONVERGENCE | AI + ERP

MIAMI | 2025

Dynamics 365 Project Operations: AI powered Innovation and Roadmap

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Microsoft

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Topics

- What is Dynamics 365 Project Operations?
- Microsoft Project Solution Landscape
- Dynamics 365 Project Operations Roadmap

Microsoft

Dynamics 365 Project Operations

Disparate systems and data silos are impacting success

Project managers

Redundant workstreams, disconnected tools, and difficult sales hand-offs

PS

PPM

BI

Resource managers

Lack of visibility across projects and into cost of resources

CRM

Account manager

Difficult to accurately quote and zero visibility into project delivery

Collab

T&E

Team members

Misaligned to work and frustrated due to lack of clarity on project

Social

Finance manager

Inaccurate budgets and timelines

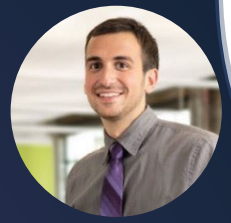
ERP

CxOs

Lack of visibility into success of projects and cash flow

Unify your project-centric business in a single app

Project managers
Accelerate project delivery



Resource managers
Optimize resource utilization

Account manager
Win more contracts

Partner manager
Simplify project procurement

CxOs
Increase business agility and operational excellence

Finance manager
Deliver on-time and accurate project-based financials

Team members
Collaboration and simplified time and expenses

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Project Operations

Leading the way in Service-centric ERP

Copilot Adaptive Experiences

Deal management	Work planning	Resourcing	Project Execution	Subcontracting	Billing & Proforma
Multiple Contract Types	Project scheduling	Skills management	Time, Expense and Material usage	Capacity planning	Unbilled and billed backlog
Lead to Project Contracts	Gantt, Kanban boards	Resource requests	Mobile Apps	Supplier onboarding & vendor management	Not to exceed limits and commitments
CPQ for Services	Estimates and Budgets	Booking reconciliations	Policies & rules for Entry and Approvals	Goods and Services delivery	Invoice review and edits
Advanced contract limits	Project Templates	Workforce planning and management	Budget tracking and earned value	Invoice three-way match	Adjustments and corrections

Core Sales, Unified resource scheduling, and Power Automate(Workflow, business rules and process frameworks)

Extend

MICROSOFT CLOUD

Connectors & Common Data Framework	Copilot	Collaboration	Security	AI & Analytics	Low-Code Agility	Sustainability
Dataverse, Azure Synapse, Azure Data & AI		Microsoft 365 & Teams	Microsoft Security	Power BI	Power Apps, Power Automate & Power Pages	Cloud for Sustainability

Industry and Analyst Recognition

Dynamics 365 Project Operations is the leading application in Analyst's rating of Service-centric offerings

The evolution of Microsoft Project and Planner

Project desktop

Desktop client

.mpp files*

Project Server

Project Server

+

Data in SharePoint Server

Project Online

Web application

+

Data in SharePoint

Planner

Planner

Planner Accelerator

+

Data in Dataverse

End of Life
9/30/2026

*.mpp files = project files created in Project desktop. PWA = Project web app.

Current Project Oriented Solutions from Microsoft

Legacy Project and Portfolio Management

Project desktop

Desktop client

On-premises project management application designed for professional project managers

Project Server Subscription Edition

Project Server

Project Server Subscription Edition offers feature parity with Project Online. Must be hosted on IaaS or on-premises.

Work Management

Planner

Planner

Planner Accelerator

A unified solution for work management powered by the Project Manager agent, which uses AI to create plans, execute tasks, and accelerate results.

Service – centric ERP

Project Operations

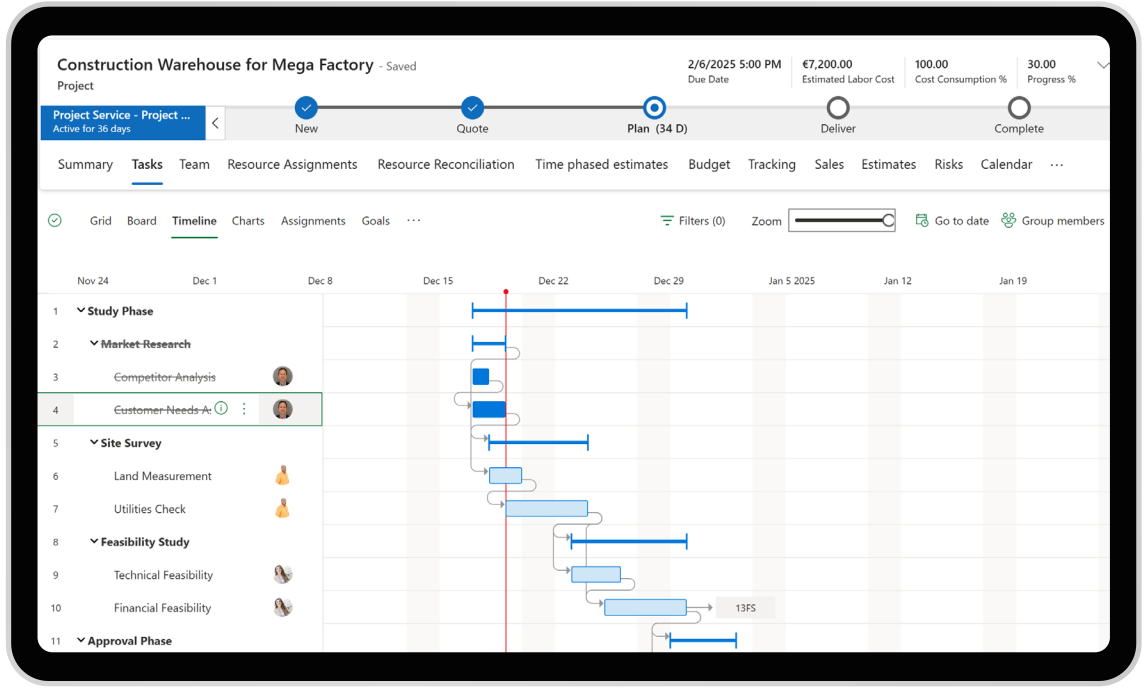
Core
Integrated with ERP
For Manufacturing

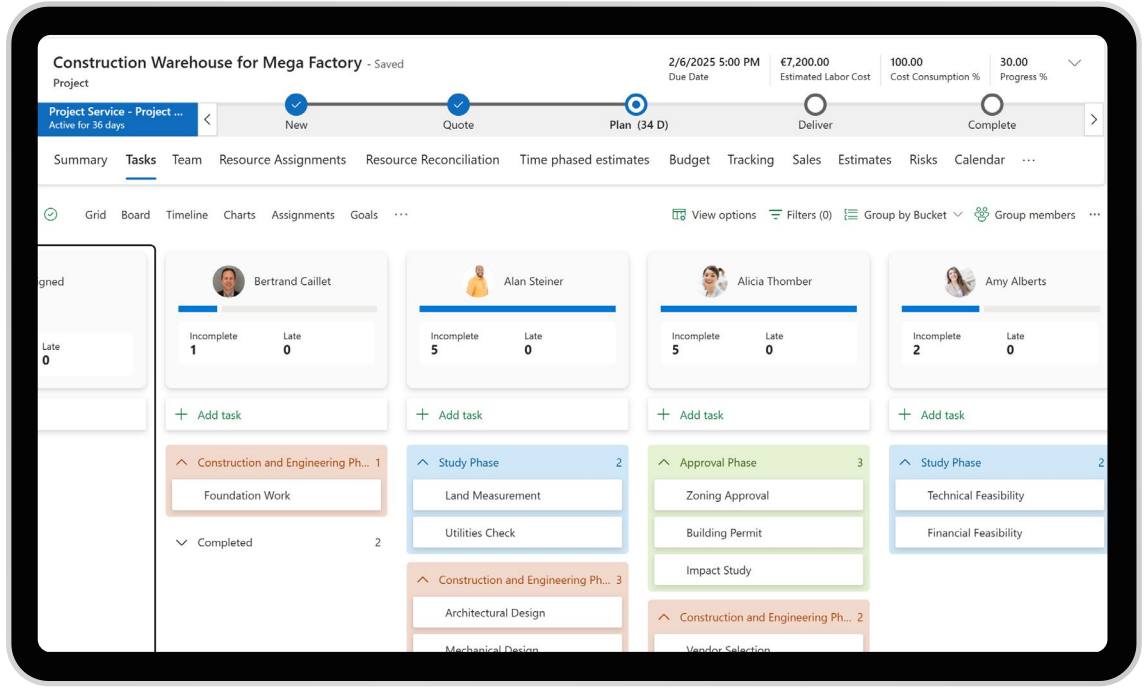
Unifies sales, project planning, resource management, time & expense tracking, and financials. Embeds Planner capabilities for work management.

Microsoft Dynamics 365

Project Operations

Embedded Microsoft Planner capabilities





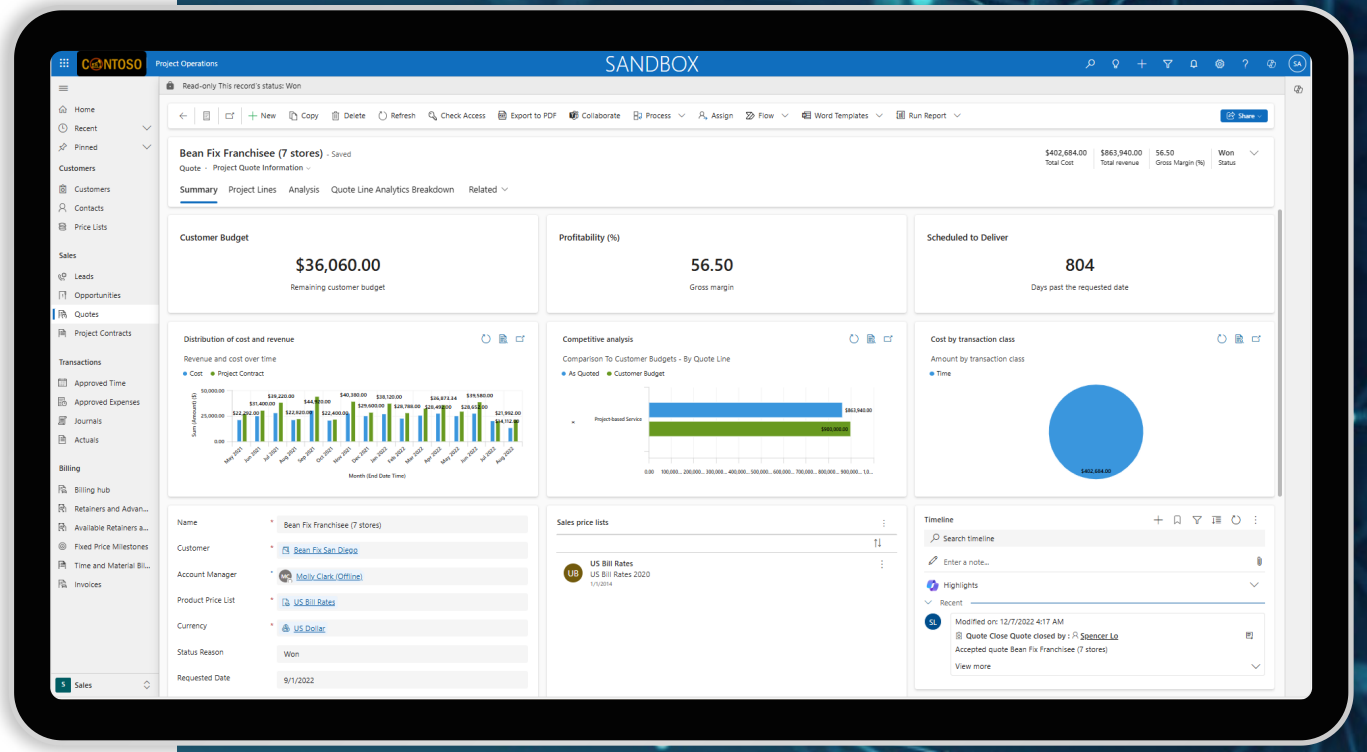
Use Microsoft Planner functionality to organize project tasks, track dependencies, monitor task completion, and view and update the project timeline

Streamline handoffs from quote to project

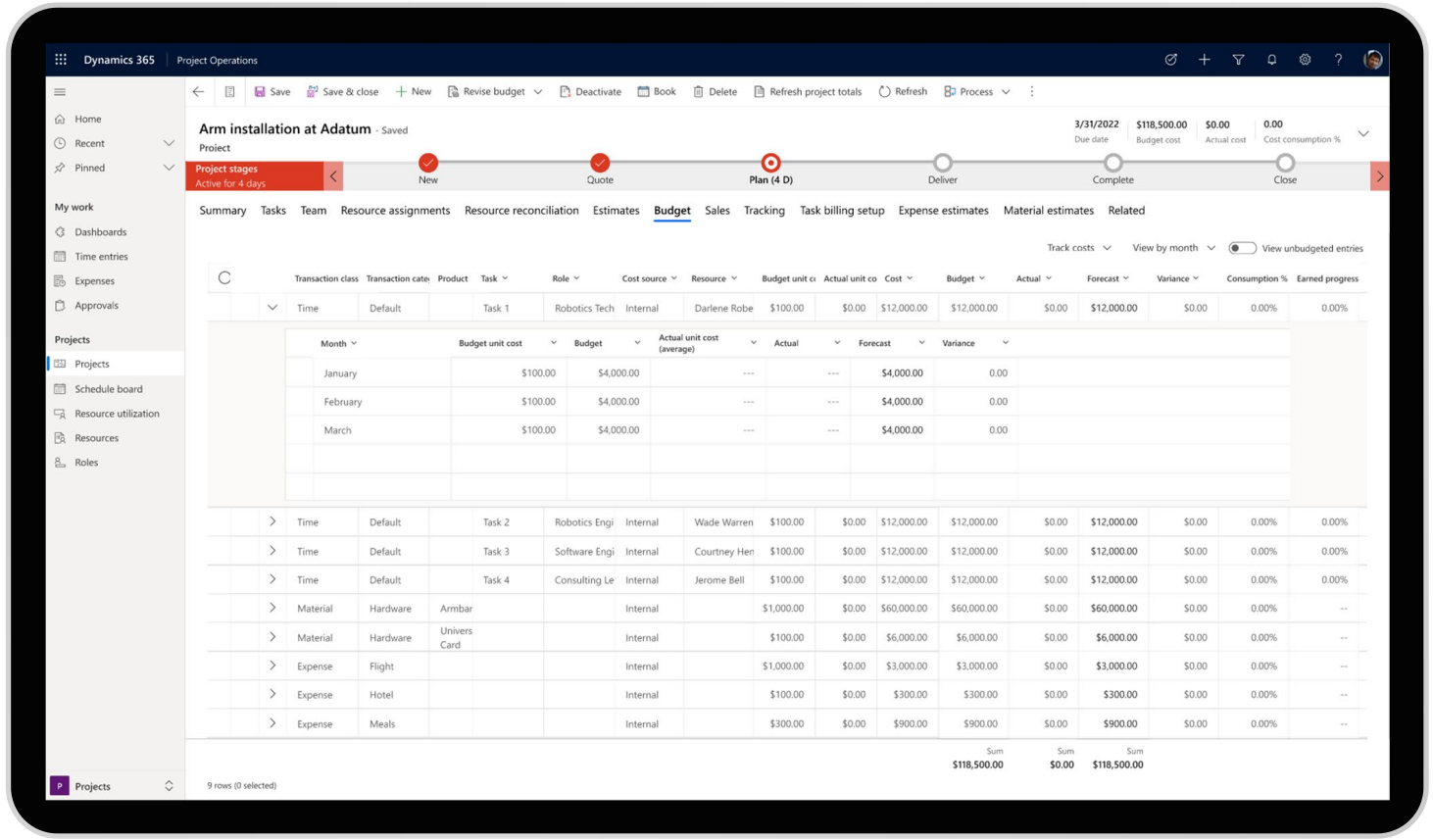
Preplan resource requirements during quotation phase so projects can start right at signature

Link sales estimates to quotes and project estimates to improve visibility and collaboration

Use previous project data and standardized templates to ensure project quotes are accurate and profitable



Project budgeting and forecasting



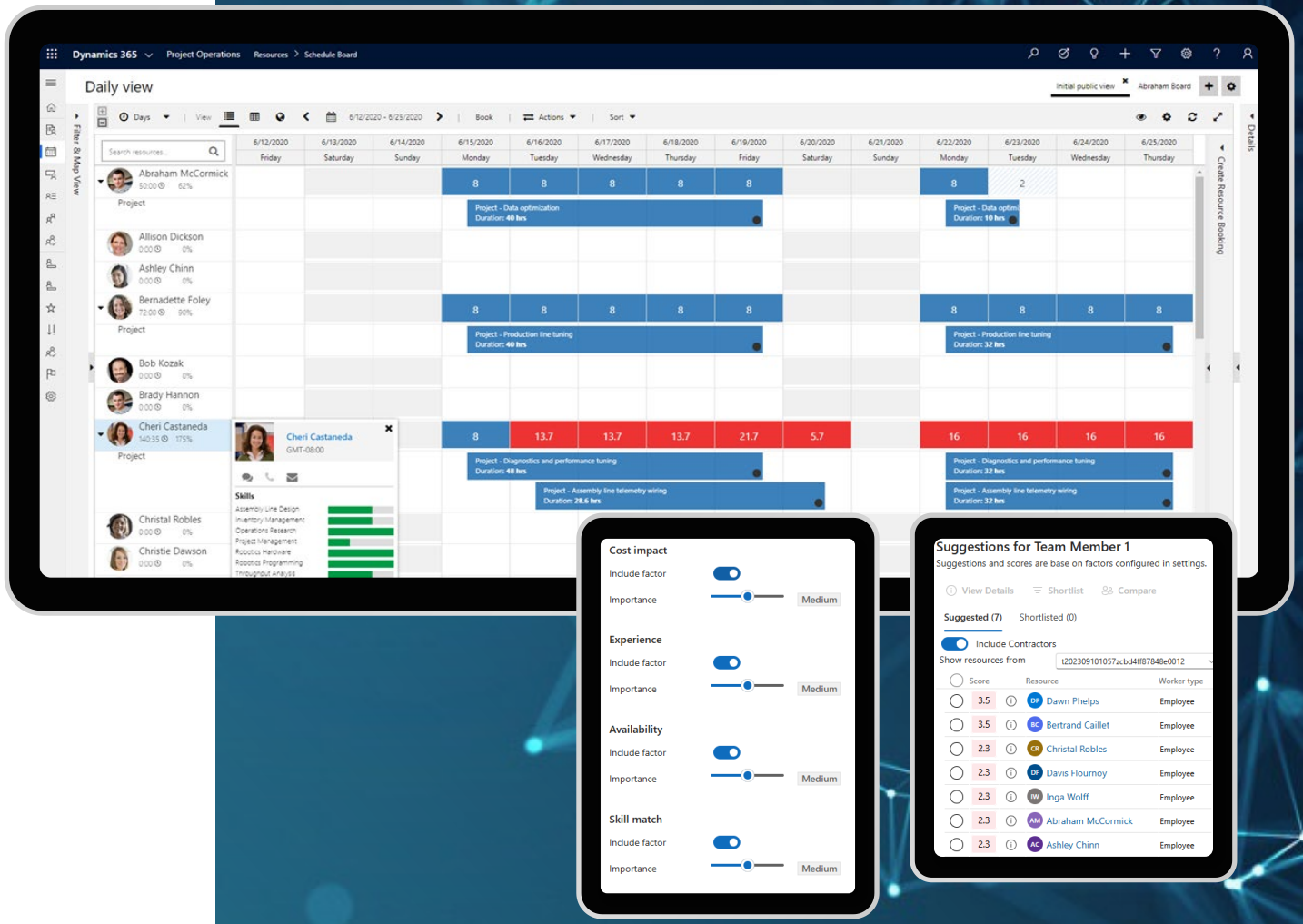
- Record client budget
- Forecast time, expense, and material
- Approve budget and forecast
- Monitor actual costs
- Manage budget and forecast revisions

Optimize resource utilization with Copilot

Get suggested resources from Copilot based on previous assignments, availability, and skill match

Use project forecasts to make sure you have enough resources for upcoming work

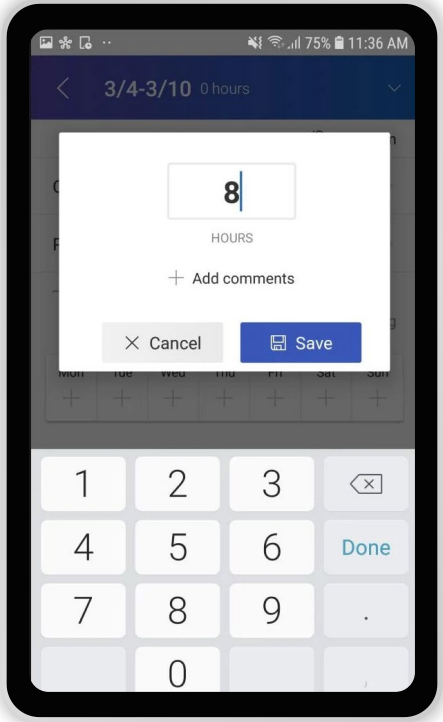
Maximize your resource utilization with resource capacity dashboards



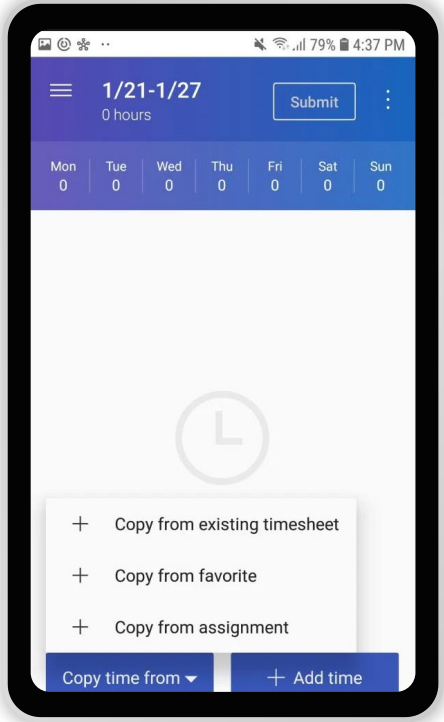
Project time tracking

The Project Timesheet mobile app enables users to submit and approve timesheet for projects, improving user productivity and efficiency as well as enabling timely entry and approval of project timesheets.

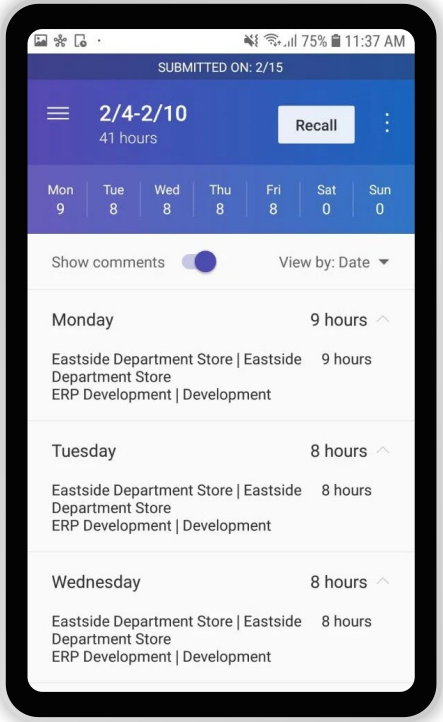
Enter time



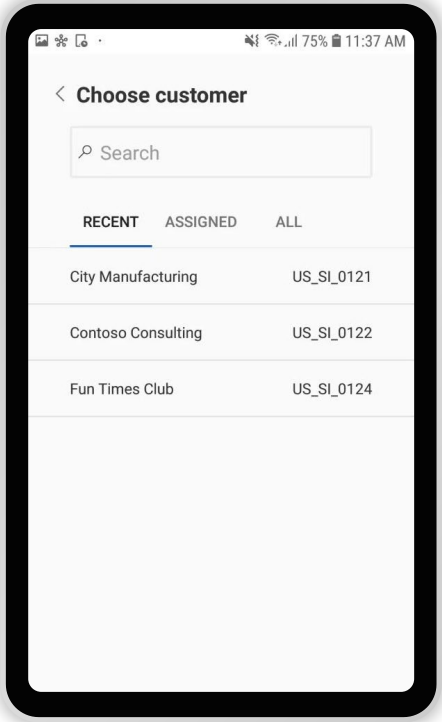
Create and copy timesheets



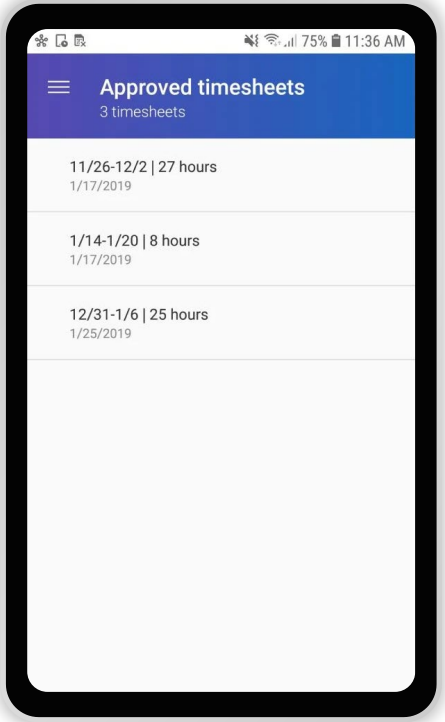
View your timesheets



Find data for your timesheets



View archived timesheets

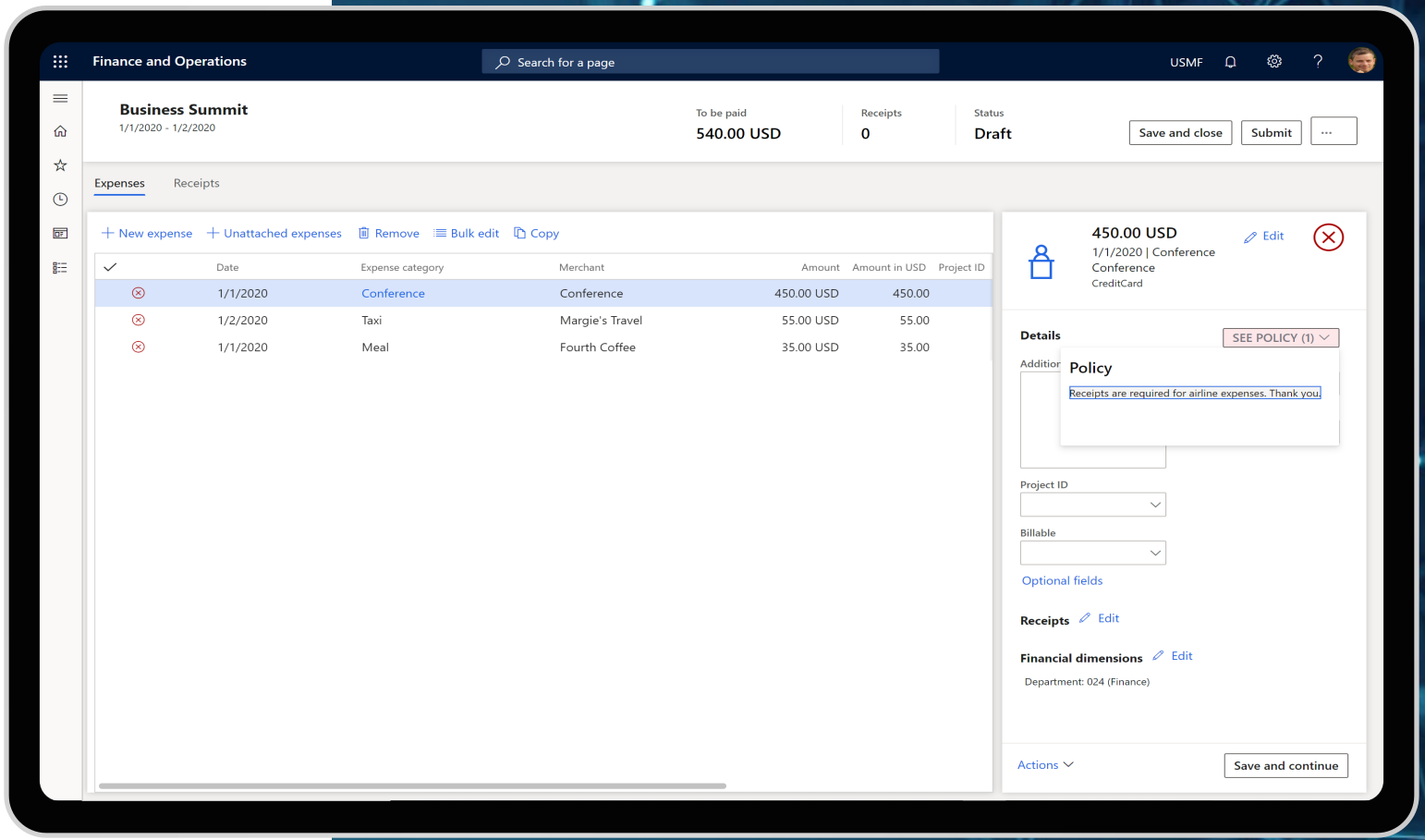


Expense management

Improve project budget control with expense tracking and entry polices

Automate expense entries with credit card statement import and reconciliation

Increase expense entry and approval process efficiency with mobile experience



Billing options

Time and materials projects	Issue project invoices based on actual hours and items posted
Not-to-exceed limits	Prevent invoicing over contractual limits
Billing schedules	Define invoice cadence according to contract agreements
Fixed price projects	Issue project invoices based on an agreed-upon price
Milestone billing	Issue project invoices based on project completion percentage or timeline

How to choose the right Microsoft solution your organization?

Solution Fit by Use Case

Planner

Lightweight task planning

Project Server

Traditional Project Management with financials

D365 Project Operations

End-to-end project business management

- ✓ Opportunity Management
- ✓ Quotation + Contract Management
- ✓ ERP Integration
- ✓ Financial Management

Feature Comparison Snapshot

Capability	Planner	Project Server	D365 Project Operations
Advanced Scheduling	✅	✅	✅
Portfolio Management	⚠️ !{ .´·. .,,. •	✅	⚠️ !{ .´·. .,,. •
Resource Management	⚠️ !q‡˚ .¶.	✅	✅ Enterprise
Opportunity Management	❌	❌	✅
Quotation & Contract Management	❌	❌	✅
Financial Management & Timesheets	❌	✅	✅
ERP Integration	❌	❌	✅
AI & Copilot	✅	❌	✅
Reporting & Analytics	Power BI	No Data	Power BI

Dynamics 365 Project Operations

Enterprise-Grade. Dataverse-Powered. AI-Driven.

Enterprise Project Management—Unified in Project Operations

One-Liner (Headline)

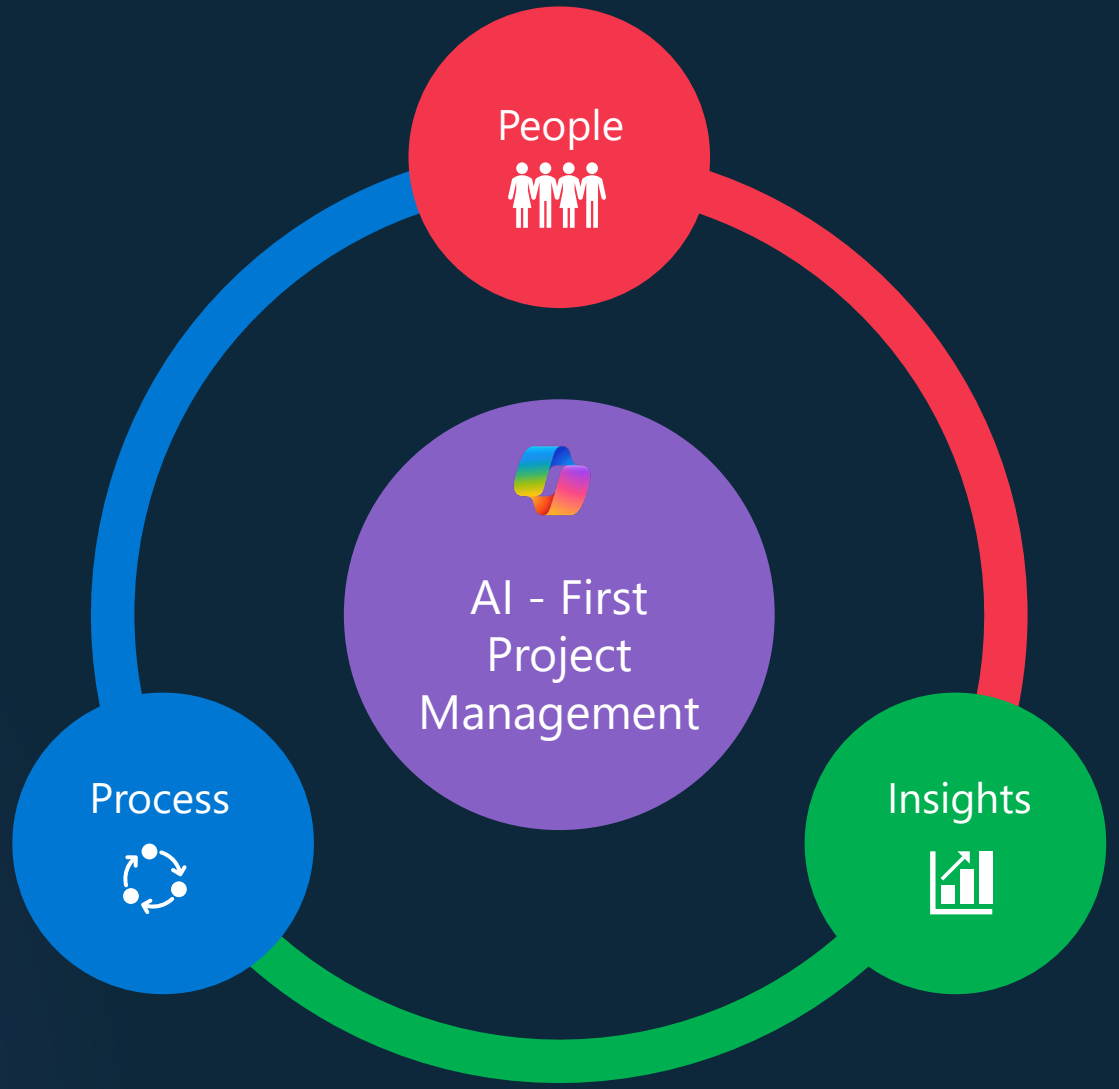
One platform for planning, execution, and profitability.

Supporting Proof Point

With Planner Basic and Premium shifting focus to general work management, Project Operations stands as Microsoft's exclusive solution for enterprise project management. Built on Dataverse—the single platform for business applications—and powered by Copilot Studio and intelligent Agents, it delivers end-to-end Project-to-Profit capabilities from sales and estimation to budgeting, tracking, and financials.

Our Mission

Create adaptive, predictive, and connected experiences that redefine how projects are conceived, executed, and optimized harnessing Copilot and Agents on the Dataverse foundation



Value Themes

Sales process	Plan	Resourcing	Execute	Track and Report	Invoice and Financials

Seamless handoffs between Sales and Delivery teams

Contracting models tailored for services

Productivity focus with tailored experiences for project managers from ideation to close

Single pane of glass for workforce planning, skills and availability

Collaboration, connectivity and tracking across global teams in remote and gig working models

Seamless integration to billing and accounting functions

Transformation of Service Delivery Operations with Copilot – From Sales to Revenue

Recent launches & product updates

Project Estimation and Planning

Support for larger projects

Performance in Task Schedule APIs: 90% faster

Deepen scheduling paradigms – critical path optimization and advanced constraints

AI –powered Resource suggestions to Project Managers

Sales and Account Managers

Project Execution

Project Budgeting and time-phased forecasting

New Power App for Mobile time entry

Deepen subcontractor experiences

Stocked product support

Project Manager

Project financials

Continue and complete financial dimension defaulting flexibility, Contract Line vs Project

Support for larger invoices using Asynchronous DW

Enable GL journals for projects in the modern architecture

Finance and Practice Managers

Fundamentals: Performance, Reliability & User Interaction Patterns

FY 2026 priorities

Fundamentals

Performance and Scale

1. Resource Management
2. Pricing
3. Transaction approvals
4. Invoice processing

Usability and Interaction patterns

1. Quote and Contract
2. Estimation and Budgeting
3. Invoice
4. Approvals
5. Transaction Corrections

Functional depth and maturity

What- if simulations and analysis

Change order management and support

Subscription Billing

Investment projects

Intelligence and Automation

Improvements to Time, expense and approval agents

Evolve Project Collaboration and work management with Office and Dynamics data graphs

Roadmap - 12-18 mos

Project Estimation and Planning

Continue support for larger projects

Investments into performance of Resource Scheduling experiences

Deepen scheduling paradigms – Task level Calendars and Schedule Modes

Project Manager

Project Sales

Project baselining and change management experiences

What-if analysis and modeling alternatives

AI assistance for task execution for Project teams and project statusing for Project Managers

Sales and Account Managers

Project Execution and Tracking

Billing dashboards and improvements to Proforma Invoicing

Improvements to Visualization and tracking of budgets and earned value

Subscription billing models

Finance and Practice Managers

Fundamentals: Performance, Reliability & User Interaction Patterns

AI adoption in PMO

80%

of project management (PM) tasks will be done by AI by 2030

https://www.gartner.com/en/newsroom/press-releases/2019-03-20-gartner-says-80-percent-of-today-s-project-management

17.3%

CAGR – The AI in Project Management Market is projected to grow from USD 2.5 billion in 2023 to USD 5.7 billion by 2028.

https://www.marketsandmarkets.com/Market-Reports/ai-in-project-management-market-114598376.html

93%

of companies that invested in AI in Project Management have reported a positive ROI in the last 12 months.

Capterra research 2024: https://www.capterra.com/resources/data-on-ai-in-project-management/

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Organizations must keep up with AI's disruption of knowledge work

AI transforms how teams get work done

>70% Professional service organisations integrate AI into their workflows

leading to

40% Faster market analysis

63% More efficient doc reviews

55% Faster financial close

that drives

- **20%** Higher win rates
- **12%** Improved project quality
- **15%** Better client retention rates

(Sources: Firmwise – AI in PS, McKinsey Digital Transformation Index)

Expectations are changing rapidly for team members

3x higher revenue growth per employee within industries exposed to AI

with teams operating more effectively

*"What used to take 14 consultants can **now be done with 2-3 consultants** and a few AI agents."* - McKinsey

and AI Agent adoption rising swiftly

25% (2025) → **55%** (2027 projection)

(Sources: PwC AI Jobs Barometer, Deloitte Report, Wall Street Journal)

There's no place for "work about work" in this transformed world

Keeping up with this transformation **begins with eliminating grunt work**

to help consultants **reclaim** **15-20** hrs/week

and **improves profit margins** by **5-8%**

With the least

Complexity to implement and *Client-facing downsides*

(Sources: Firmwise – AI in PS, 2025 PS Benchmarks)

Classified as Microsoft Confidential

To become your single place to manage all work on projects.

We must support and simplify the stack for you across the day.

Simplify task management

Automate time & expense tracking

Communicate with team + share updates

Easy access to your team's knowledge sources

Achieve utilization goals with recommended projects

Agent vision for Project Operations

Business Viability and Practice Expansion

Agent-led Project Management Office (PMO)

Uses human defined set of KPIs and best practice documentation to orchestrate process and workflows for project manager agents

Policies and KPIs of the PMO

- Win rate
- Resource utilization
- Client Sat.
- Profitability
- DSO
- On time delivery
- Contractor Performance
- Cashflow
- ....

Project Manager Agent

Uses the insights and action recommendations of the PMO agent to orchestrate processes for the project.

A project manager agent invokes multiple micro-agents with project-specific goals

- Create task plans
- Risk review and alerts
- Stakeholder Communication
- Change tracking
- Author Project proposals
- Baseline and forecast
- Optimize resources
- Approvals
- Meeting notes and action items
- Task assistance and Doc Q&A
- Budget tracking
- Track work progress
- Subcontractor management
- Invoice review

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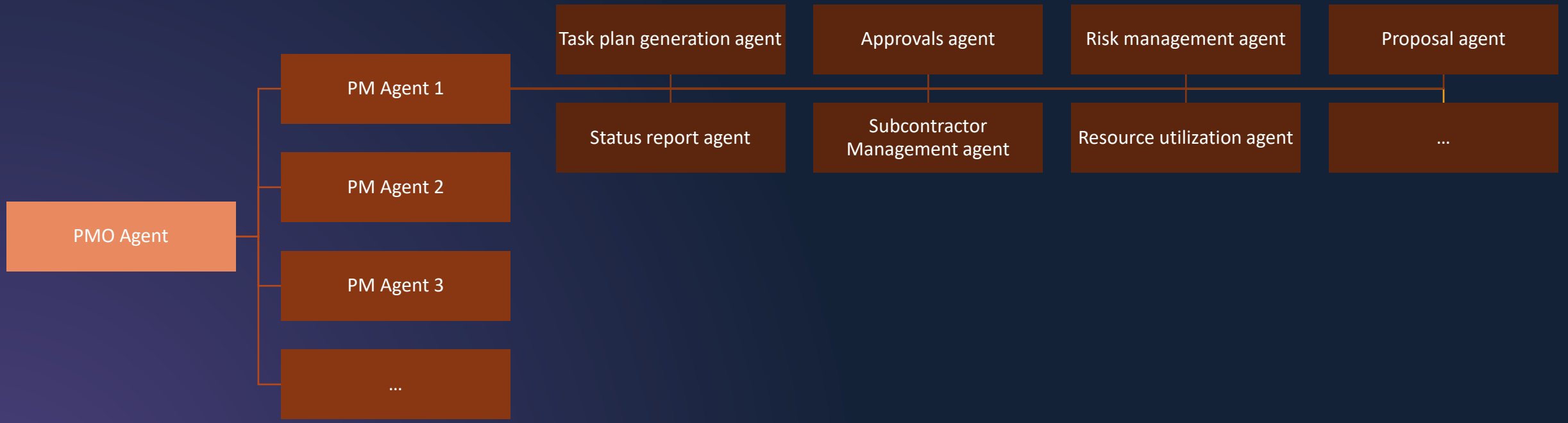
Agent vision for Project Operations



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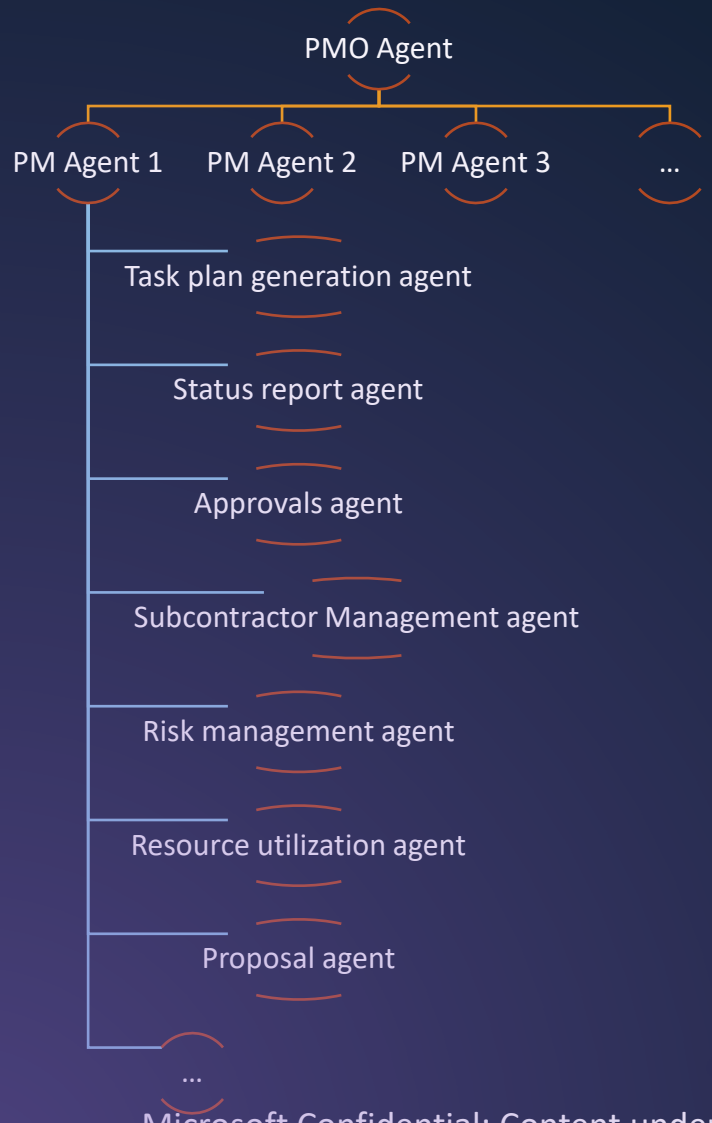
AI in every layer



UX Layer – Cross app experiences across UCI, Operations, Teams, Outlook, etc

NL based interactions

Adaptive UX

Cross app experiences

Dynamic orchestration across micro agents and processes

Human in the loop for oversight and review as needed

Insights and outcomes from structured data and textual content

Learning based feedback loop

Standardized Protocols to enable LLM access

Link people, resources processes and projects with outcomes

Record and relate process outcomes

Build correlations between projects and tasks

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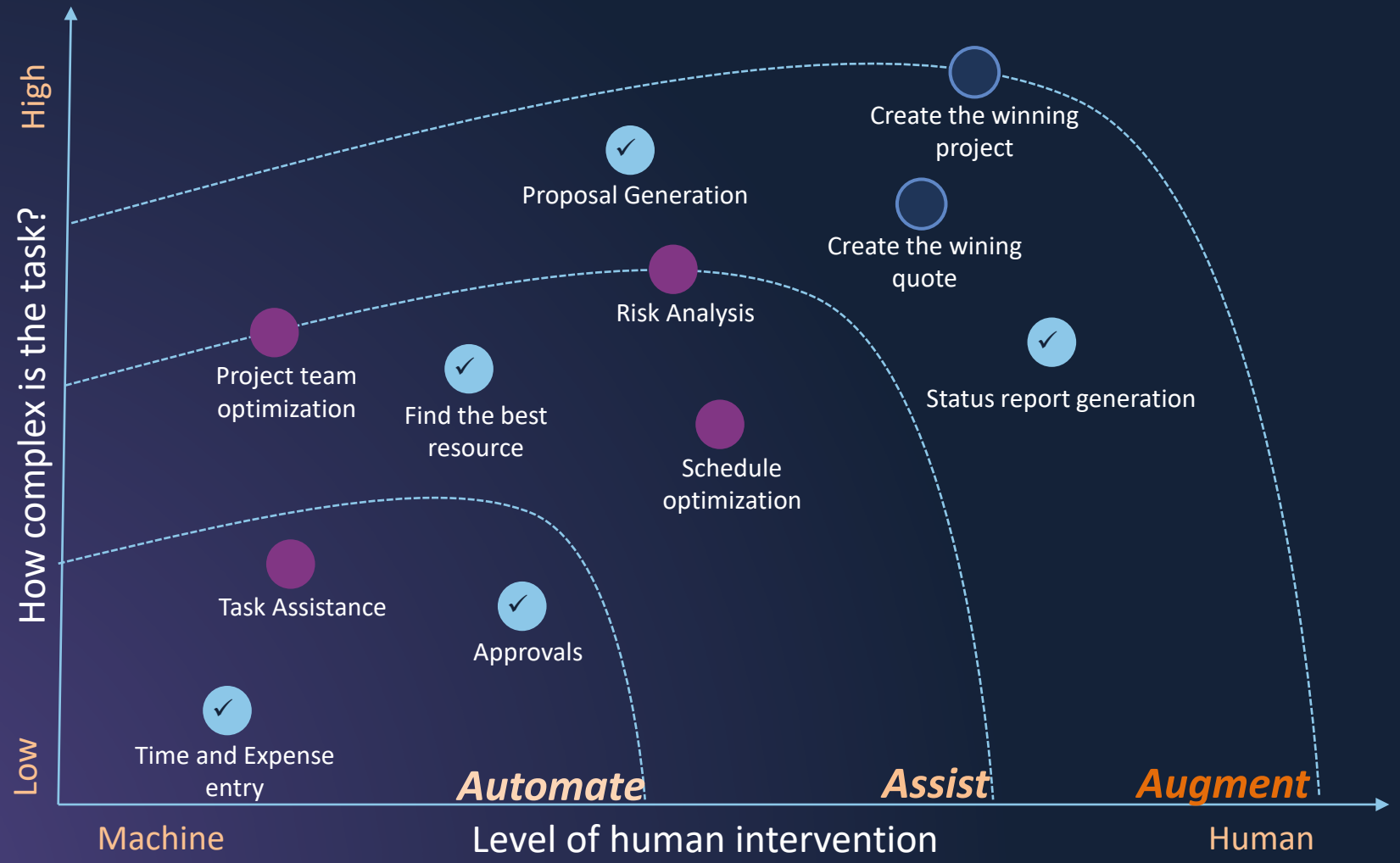
Generative AI spectrum for Project Operations

AUTOMATE → *ASSIST* → *AUGMENT**



Influence of GenAI will be determined by
- Level of complexity
- Level of human intervention needed to get the expected output from AI

Within these two dimensions, GenAI can provide support on a spectrum that ranges from automation, to assistance, to augmentation*.

Released
In consideration
Longer term

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* Thought Leadership - https://www.pmi.org/

Outlook

Search

Home View Help

1/2 Daily Team Sync in 5 min Microsoft Teams Mee...

New Outlook

New mail | Delete | Archive | Sweep | Move to | Quick steps | Read/Unread

Favorites
- Inbox 22

Folders
- Inbox 22
- Drafts
- Sent Items
- Deleted Items
- Junk Email
- Archive
- Expenses
- January Expenses

Add account

Focused Other

SC Salt Co. Amsterdam
Your receipt for your meal on... 4/23/25
Please find the receipt attached. We...
Receipt#112...

SP Sarah Perez
Project Tracker Design Doc 4/23/25
Here is comprehensive and user-frien...

AH Amsterdam Hotel
[EXTERNAL] Your invoice for y... 4/23/25
Hi Bahar, We hope you had a pleasan...
AMH_Invoice...

Aron Buxton
Diversity & Inclusion Planning 4/23/25
Let's get together and discuss the D...

Yesterday

AS Acme Services
Invoice for our services 4/22/25
We hope this email finds you well. Ple...

Eleanor Pena
Pricing Information 4/22/25
Hi all, according to our discussion yes...

CE Cash Express Online Services
Cash Express Card statement 4/22/25
Dear Cardmember, Your latest Cash E...

DR Dianne Russell
Research Project Update 4/22/25
I hope this email finds you well. Attac...
Project update

RF Robert Fox
Invoices 4/22/25
Thank you for choosing our services....

Send | From: bahar@lamna.com

To: Expense Entry Agent

Cc:

Fw: Your receipt for your meal on 23 April, 2025

Draft saved at 9:55 AM

Receipt#112233.pdf
230 KB

Regards,
Bahar

From: Salt Co. Amsterdam <noreply@saltamsterdam.com>
Date: Wednesday, 23 April 2025 at 12:22 PM
To: Bahar Shammas <bahar@lamna.com>
Subject: Your receipt for your meal on April 23, 2025

Dear Diner,

Please find your receipt attached with this email. We hope you enjoyed your meal.

Regards,
Salt Co

Salt Co
Amsterdam

4/23/2025 12:22 PM
TAB15
Card HOST ADAM

QTY	DESC	AMT
1	Sandwich	$30.00
1	Drink	$6.36

Continuing investments to sharpen Agent value

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QUESTIONS
Sponsored By Microsoft
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THANK YOU
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