

# PMO *Conference* LONDON 2024



# Utilising AI in the PMO with Microsoft Copilot



# Introduction



**Chris Edwards** – Head of Product Development at QDC

## Experience

- 8 years PPM experience
- Specialise in Microsoft PPM solutions
- Project Server, Project Online, Project for the web

## Responsibilities

- Stay up to date with Microsoft technology
- A focus on innovation
- Developing and maintaining solutions

## **Introduction to Microsoft Copilot**

- What can it do?
- What are the Benefits?

## **AI within the PMO**

- Where can the tool bring efficiencies
- Examples of using Copilot tools effectively for a PMO
- Creating a project with Copilot

## **Copilot and Project tools**

- Copilot in Project for the Web
- Creating Projects in Planner
- Status Reporting and Highlighting issues

# Q&A



# Introducing Copilot





Daily generative AI assistant

# What can it do?



Document creation & drafts



Concise email summarization



Enhance collaboration in meetings



Data analysis and modelling



Draft plans and suggest tasks

# Benefits for your business



64%

spent less time  
processing emails



68%

mentioned improved  
work quality



70%

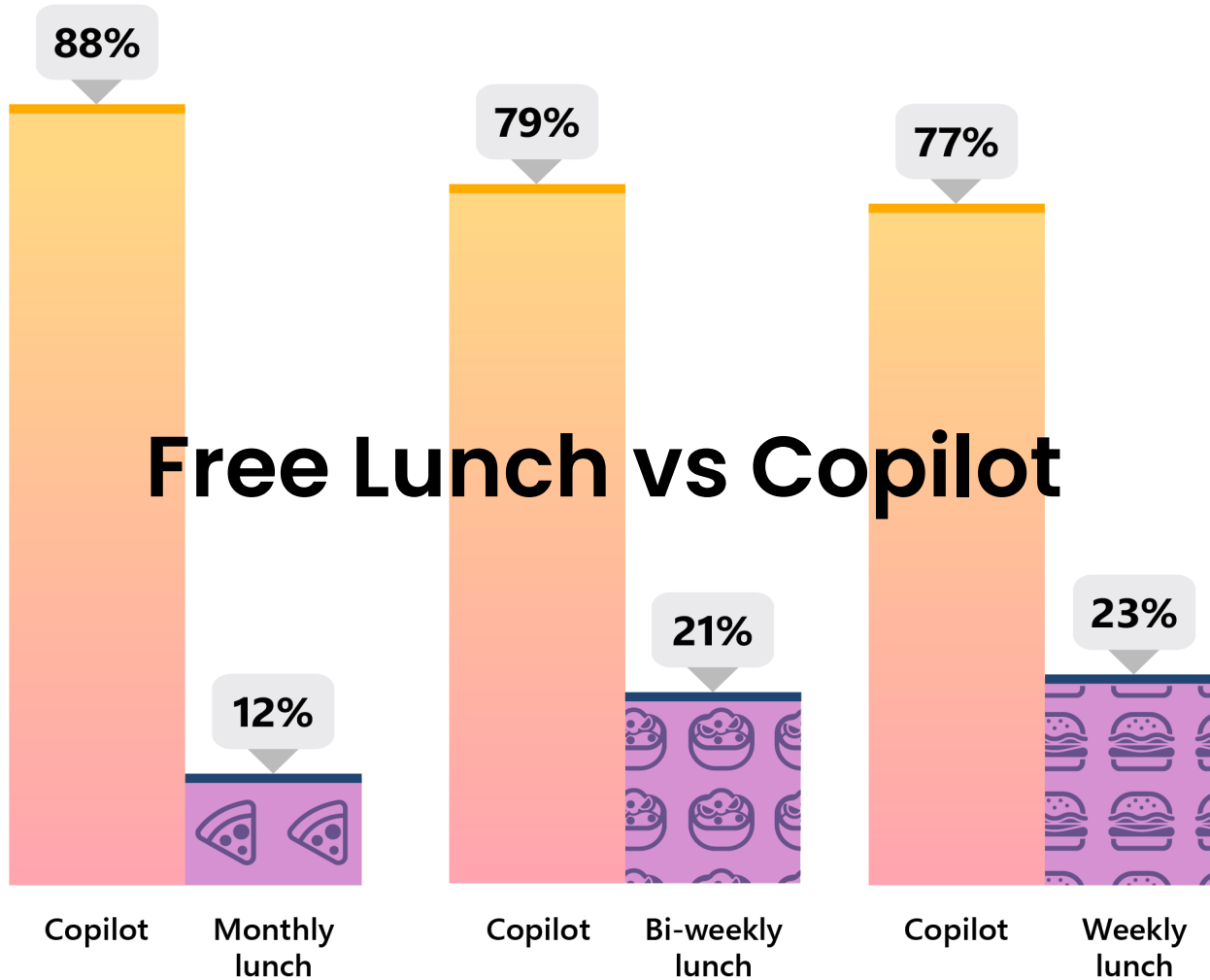
reported increased work  
productivity



- ❖ Users were 29% faster in tasks like searching, writing, and summarizing.
- ❖ Copilot helped users catch up on missed meetings nearly 4x faster

Share of respondents

# Free Lunch vs Copilot





# Top 10 to try first with Copilot

Recap a meeting 1



Summarize an email thread 2



Draft email 3



Summarize a document 4



Tell me about a topic/project 5



Give me some ideas for ... 6



Help me write ... 7



What did they say ... 8



Revise this content 9



Translate a message 10



# AI within PMOs

- ❖ Project Documentation
- ❖ Meeting Minutes & Discussions
- ❖ Presentation Preparations
- ❖ Data Analysis
- ❖ Enterprise PPM Solutions
- ❖ Project Schedules



## 1. Summarize Requirements and Data

Leverage Microsoft Copilot to summarize all requirements and related data to build the framework for the project.



Copilot

Clearly outline the project's purpose, goals, and deliverables using Copilot.

## 2. Discuss the plan

Meet with the team to discuss the project plan and use Copilot in Teams to summarize the meeting, with action items.



Copilot in Teams

Summarize the meeting and list the action items discussed and their status using Copilot in Teams.

## 3. Outline the tasks

Use Copilot in Planner to help generate tasks and appropriate project goals.



Copilot in Planner

Incorporate all key milestones and important deadlines back into the project document

## 6. Revise support procedures

After project is completed, use Copilot in Word to revise procedures and change management documents for support teams and admins.



Copilot in Word

Ensure high writing quality using Copilot to revise first drafts.

## 5. Create a status report

Use Copilot in PowerPoint to create a presentation based on the project plan to brief the CIO on the project status and results.



Copilot in PowerPoint

Speed the process of creating project status reports.

## 4. Track progress

Use Copilot in Teams to produce channel activity summaries each morning to stay up to date.



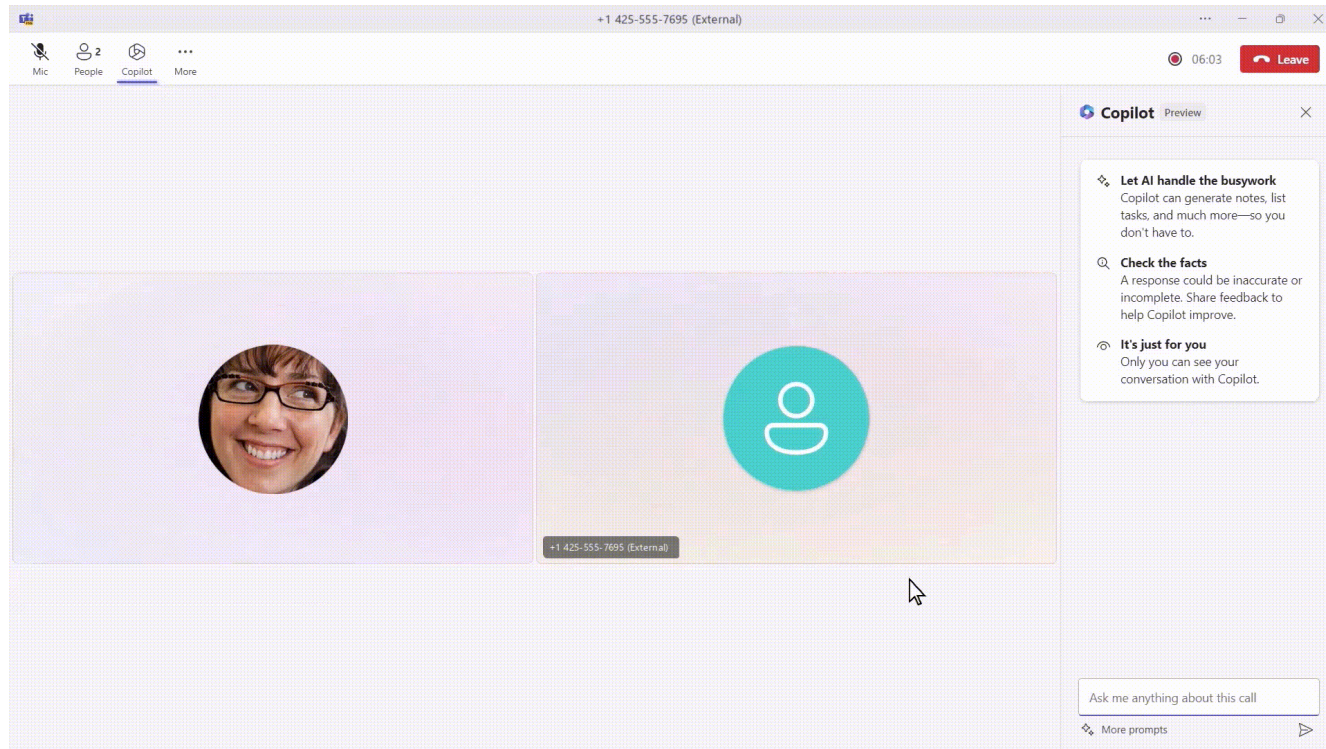
Copilot in Teams

Stay informed on project activities by using Copilot in Teams to summarize communications.

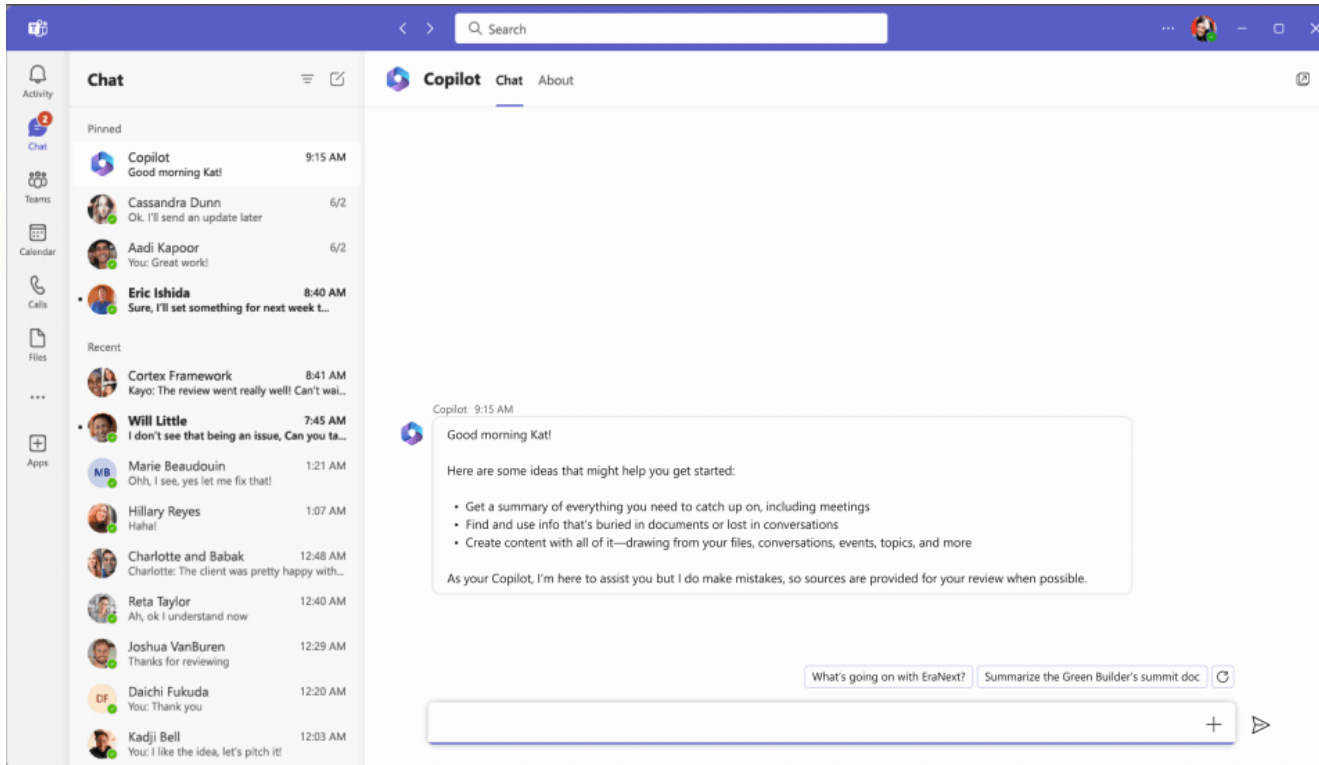
# Copilot Scenario: Create & manage a Project Plan

# Summarize Meetings and Discussions

Get Copilot to take meeting minutes for you and provide a summary of you calls



# Summarize Meetings and Discussions



The screenshot displays the Microsoft Copilot Chat application. On the left, a sidebar contains navigation icons for Activity, Chat, Teams, Calendar, Calls, Files, and Apps. The main chat window is titled 'Copilot Chat About' and shows a list of recent conversations. The selected chat is with 'Copilot', dated 9:15 AM. The chat history includes messages from Cassandra Dunn, Aadi Kapoor, and Eric Ishida. The current chat with Copilot shows a greeting and a list of suggestions for getting started, such as summarizing meetings and finding information in documents. The interface includes a search bar at the top and a list of recent chats on the left.

**Recent Chats:**

- Copilot** 9:15 AM: Good morning Kat!
- Cassandra Dunn** 6/2: Ok. I'll send an update later
- Aadi Kapoor** 6/2: You: Great work!
- Eric Ishida** 8:40 AM: Sure, I'll set something for next week L...
- Cortex Framework** 8:41 AM: Kayo: The review went really well! Can't wait...
- Will Little** 7:45 AM: I don't see that being an issue, Can you ta...
- Marie Beaudouin** 1:21 AM: Ohh, I see, yes let me fix that!
- Hillary Reyes** 1:07 AM: Haha!
- Charlotte and Babak** 12:48 AM: Charlotte: The client was pretty happy with...
- Reta Taylor** 12:40 AM: Ah, ok I understand now
- Joshua VanBuren** 12:29 AM: Thanks for reviewing
- Daichi Fukuda** 12:20 AM: You: Thank you
- Kadji Bell** 12:03 AM: You: I like the idea, let's pitch it!

**Copilot Chat (9:15 AM):**

Good morning Kat!

Here are some ideas that might help you get started:

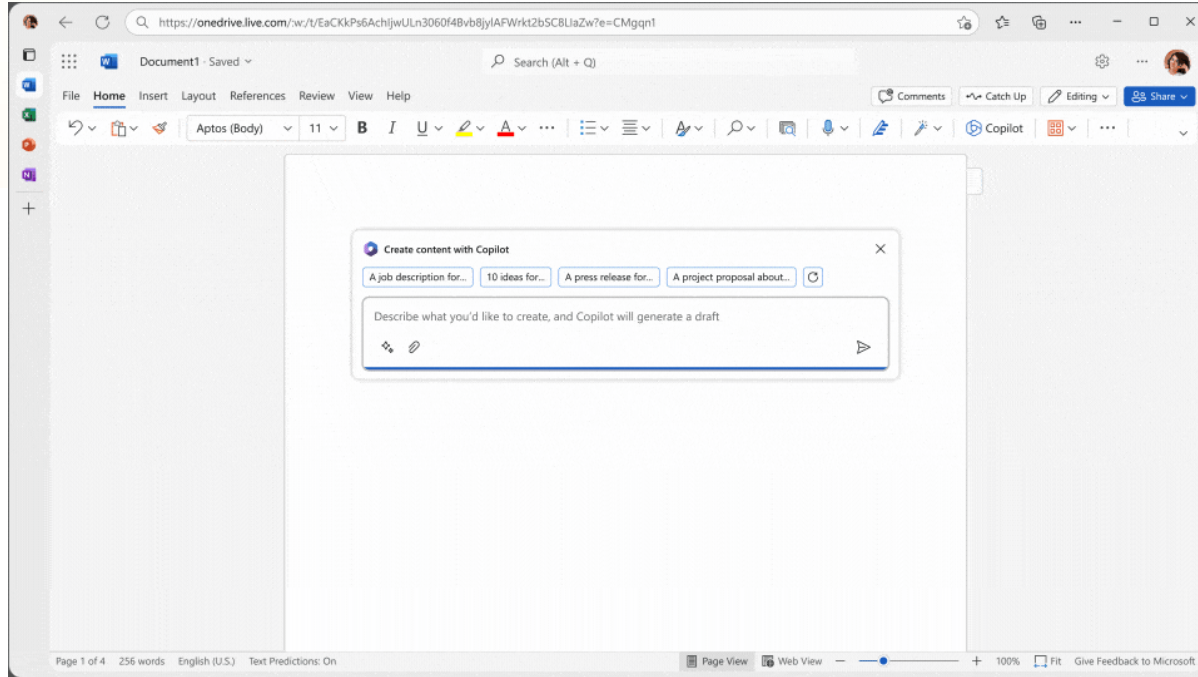
- Get a summary of everything you need to catch up on, including meetings
- Find and use info that's buried in documents or lost in conversations
- Create content with all of it—drawing from your files, conversations, events, topics, and more

As your Copilot, I'm here to assist you but I do make mistakes, so sources are provided for your review when possible.

Input fields: What's going on with EraNext? Summarize the Green Builder's summit doc

Easily catch up on the latest updates across your projects

# Accelerate Project Documentation



- ❖ Use meeting notes to generate draft documents
- ❖ Bolster existing information using Copilot generated suggestions
- ❖ Provide support as you fill out the detail

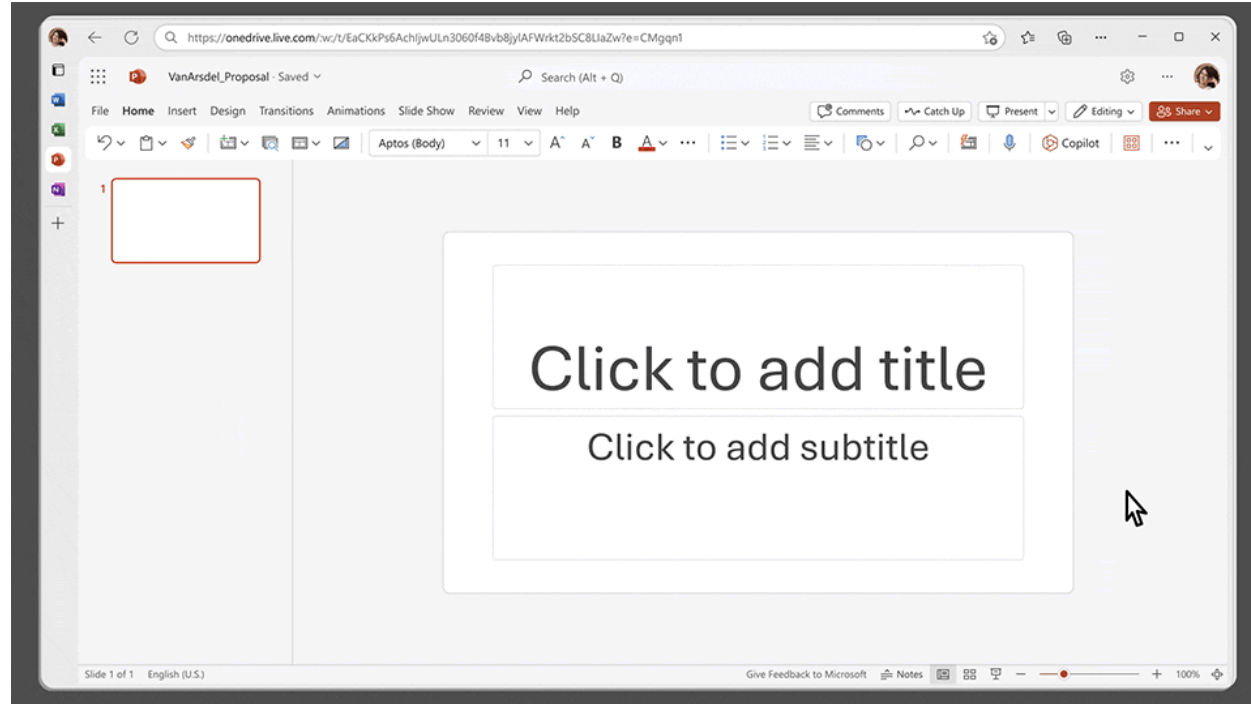


# Prepare Presentations with Compelling Slides and Narratives

Quickly prepare visually striking slide decks based on documents

Use prompts to generate new slides and content

Leverage existing branding templates



# Create Projects with Planner

















Shared

Pinned

## My Teams

Name	Last accessed by you	Shared with
 Architecture Design	2h ago	Architecture Design
 Annual employee update meeting	4h ago	Annual employee update meeting
 Mark8 project tracking	Tue at 13:18	Mark 8 Project Team
 Mark 8 Project Plan	Tue at 13:18	Mark 8 Project Team > Research and Development
 Employee benefits review	Tue at 11:25	Employee benefits review
 Data flow integration	Mon at 14:53	Data flow integration
 Email campaign to increase awareness	Mon at 12:01	Email campaign to increase awareness
 User awareness social media campaign	13 May	Sales and Marketing
 Marketing Plan	13 May	Sales and Marketing
 Infrastructure upgrades	30 Apr	Infrastructure upgrades
 CRO Customer Journey Modeling	9 Apr	CRO Customer Journey Modeling
 User Survey	1 Mar	Sales and Marketing
 Customer Survey	1 Mar	Sales and Marketing



# Generate Project Controls with Autofill



MicrosoftProject

New look

Home

Recent

Pinned

Requests

Project Requests

Projects

Project Controls

Risks

Issues

Changes

Status Reports

Project Managem...

Show As

Show Chart

New Project

Delete

Refresh

Visualize this view

Email a Link

Flow

Share

My Active Projects

Edit columns

Edit filters

Filter by keyword

	Project ID	Name	Programme	Start Date	Finish D...	Overall ...	Stage	Effort Remain...	% Com...
	PRJ-0996	Agile Project Deployment	Embedded Technology	02/02/2023	30/04/2024	Green	Initiation	424.00	0
	PRJ-1000	Azure Logic App Implementation	Embedded Technology	09/02/2023	27/09/2024	Amber	Executi...	1,066.00	0
	PRJ-1008	Cloud AI Deployment Project	Embedded Technology	30/10/2023	02/09/2024	Green	Initiation	5,107.00	0
	PRJ-1026	Data Breach Prevention	Embedded Technology	06/06/2024		Green	Initiation		
	PRJ-1004	Exchange Migration	Continuous Improvem...	22/06/2023	24/01/2024	Amber	Initiation	40.00	0
	PRJ-0998	HR Policy Updates	Embedded Technology	21/11/2022	24/11/2022	Green	Executi...	0.00	0
	PRJ-1020	Internal Policy Update	Embedded Technology	09/02/2024	18/09/2024	Red	Initiation	1,272.00	
	PRJ-1022	Internal PPM Upgrade	Continuous Improvem...	04/03/2024	24/07/2024	Green	Initiation	831.72	0
	PRJ-1003	Internal Systems Review	Continuous Improvem...	16/02/2023	20/09/2023	Green	Closure	40.00	0
	PRJ-0999	Project for the web Implementation	Embedded Technology	17/10/2022	15/03/2024	Amber	Monito...	84.00	0

1 - 10 of 10

Page 1



# Review Project Status in Planner

Stay in the know. Turn on desktop notifications.

Turn on

Activity

Chat

Teams

Calendar

Calls

Planner

OneDrive

Viva Connect

...

Apps

My plans > Annual employee update meeting

Grid

Board

Timeline

Charts

People

Goals

Assignments

Copilot

Share

Trial

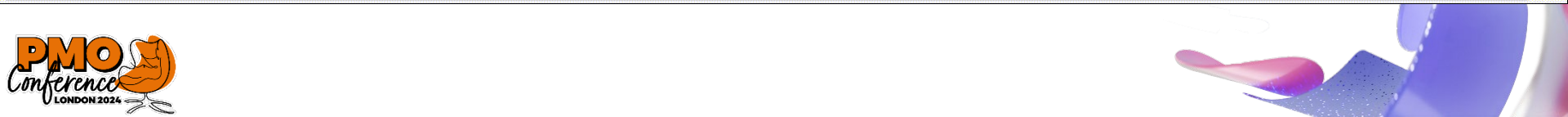
Filter by keyword

Baseline

Filters

Conditional coloring

	Outline number	Name	Duration	Effort	Start	Finish	Assigned to	% complete
1	1	Schedule meeting	35 days	40 hours	20/5/2024	5/7/2024	Lidia Holloway	
2	2	Prepare meeting material	30 days	240 hours	8/7/2024	16/8/2024	Lidia Holloway	
3	3	Deliver update	1 day	8 hours	19/8/2024	19/8/2024	Lidia Holloway	
4	4	Finalize Attendee List						
5	5	Set Up Meeting Technology	4 days		14/5/2024	17/5/2024		
6	5.1	Test Audio and Video Equipment	1 day		14/5/2024	14/5/2024		
7	5.2	Ensure Reliable Internet Connection	1 day		17/5/2024	17/5/2024		
8	5.3	Prepare Backup Communication Plan	1 day		17/5/2024	17/5/2024		
9	6	Create Post-Meeting Survey	1 day		27/6/2024	27/6/2024		
10	7	Plan for Meeting Minutes Documentation	1 day		28/5/2024	28/5/2024		
11	8	Organize Post-Meeting Follow-Ups	1 day		29/5/2024	29/5/2024		
+ Add new task								



# Copilot assistant in Project for the Web



Home

Recent

Pinned

Power BI Reporting

Reporting

←

Show Global Filter

+ New

✓ Set As Default

🔄 Refresh All

Share

Projects Dashboard

This Quarter 01/04/2024 To 30/06/2024

All Projects

Filtered

6 Modified On

IP

Internal PPM Upgrade  
PRJ-1022  
Continuous Improvement

AP

Agile Project Deployment  
PRJ-0996  
Embedded Technology

CA

Cloud AI Deployment Project  
PRJ-1008  
Embedded Technology

MI

Mal IT Technical Review  
PRJ-0997  
Embedded Technology

DB

Data Breach Prevention  
PRJ-1026  
Embedded Technology

Pf

Project for the web Implementation  
PRJ-0999  
Embedded Technology

Overall Health

Amber

Green

Red

1

4

1

Projects by Business Unit

CountAll (Name)

(blank)

IT

2

4

Business Unit

Other Queues and Views

View

6

Summary  
Filtered

View

0

My Active Projects  
Filtered

View

0

Closed Projects  
Filtered

View

6

Effort Summary  
Filtered

View

9

Financial Summary  
Filtered

View

13

Project - Active Issues  
Unfiltered

Projects by Phase

Closure

Initiation

Monit

1

4

1

Projects by Stage

Stage

Closure

Initiation

Monitoring

CountAll (Project)

1

4

1



# More Coming in 2024!

## Meeting facilitator

Copilot enables a more productive discussion in meetings by managing the agenda and taking notes anyone in the meeting can coauthor.

## Group collaborator

Copilot helps everyone get more out of chats, surfacing the most important information, tracking actions items, and addressing unresolved issues.

## Project manager

Copilot ensures every project runs smoothly by creating and assigning tasks, tracking deadlines, and notifying team members when their input is needed



# Q&A