



# Agile Project Management with Microsoft Teams and Planner

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[@Rob\\_The\\_Ninja](#)



Microsoft  
Partner



Gold Application Development  
Gold Cloud Platform  
Gold Cloud Productivity  
Gold Collaboration and Content



Accessible content is available upon request.

# About AvePoint: Corporate Overview

Migrate. Manage. Protect.



**AvePoint** is headquartered and maintains its principal operational center in Jersey City, NJ, with approximately 1,500 employees across five continents.

- From Tahoe to Today
- Inc. Magazine Hire Power Award
- Ernst & Young Entrepreneur of the Year
- Windows IT Pro Best SharePoint Product
- Deloitte Technology Fast 500

16K Customers    6M Cloud Users    88 Countries    7 Continents



Microsoft Partner  


- 2017 Partner of the Year Winner  
Public Sector: Microsoft CityNext Award
- 2016 Partner of the Year Winner  
Technology for Good Citizenship Award
- 2015 Partner of the Year Winner  
Collaboration and Content
- 2014 Partner of the Year Winner  
Public Sector: Public Safety and National Security



“

It is not the strongest of the species that survives,  
nor the most intelligent that survives.

It is the one that is most adaptable to change.

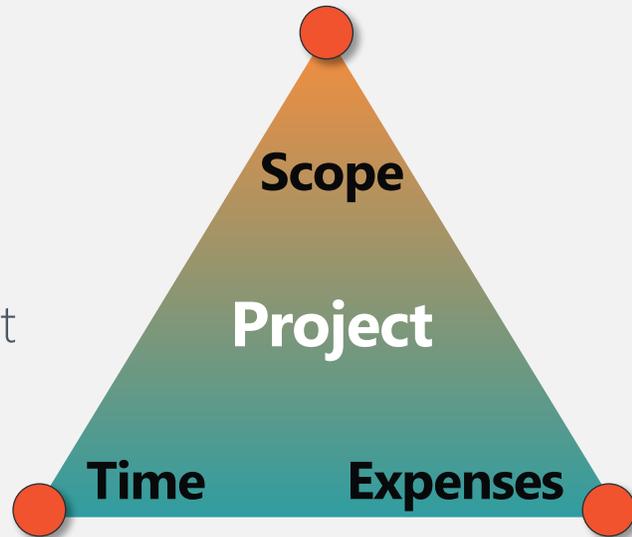
”

Charles Darwin

# How to apply Agility to Project Mgmt?

## Traditional Project Management

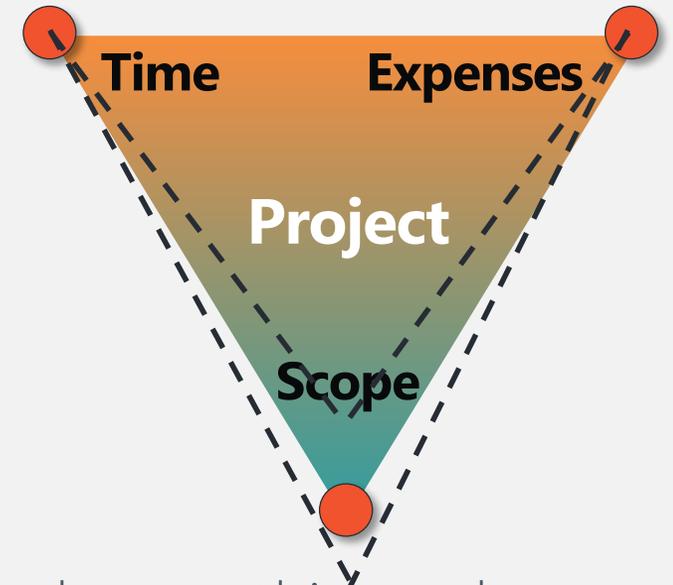
- Fixed:
  - Scope
- Adjustable:
  - Necessary effort
  - Times



Teams change milestones or hire additional staff before adjusting initially prescribed requirements

## Agile Project Management

- Fixed:
  - Expenses
  - Times
- Adjustable:
  - Scopes



If requirements change, this can be taken into account and swiftly adjusted

# Agile Project Management Manifesto

1. People and interactions are more important than processes and tools
2. A working result is more important than documentation
3. Collaboration with the customer is more important than contract negotiation
4. Responding to change is more important than sticking to a plan



# Agile Project Management Methods

Kanban

SCRUM

Extreme Programming (XP)

Feature Driven Development (FDD)

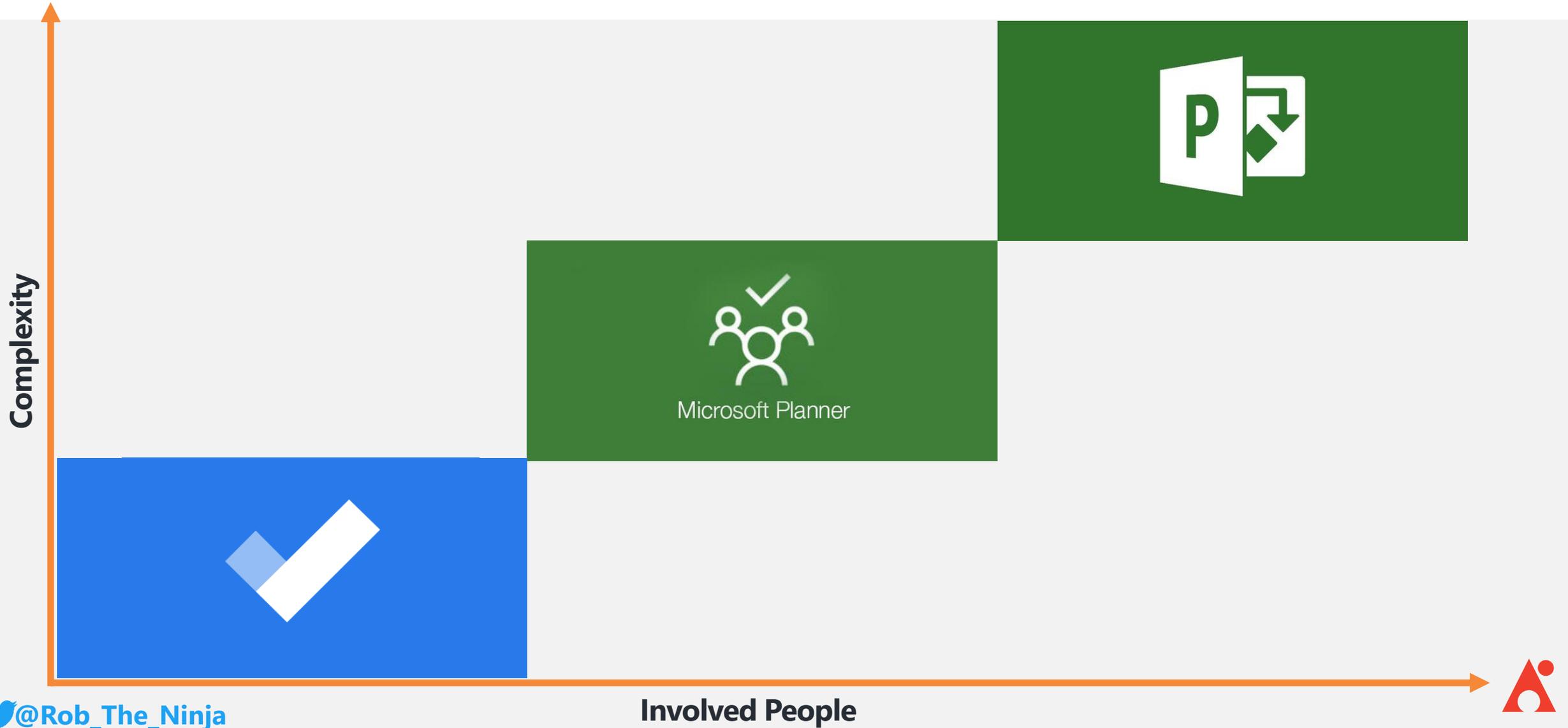


# Planner

What about Project?

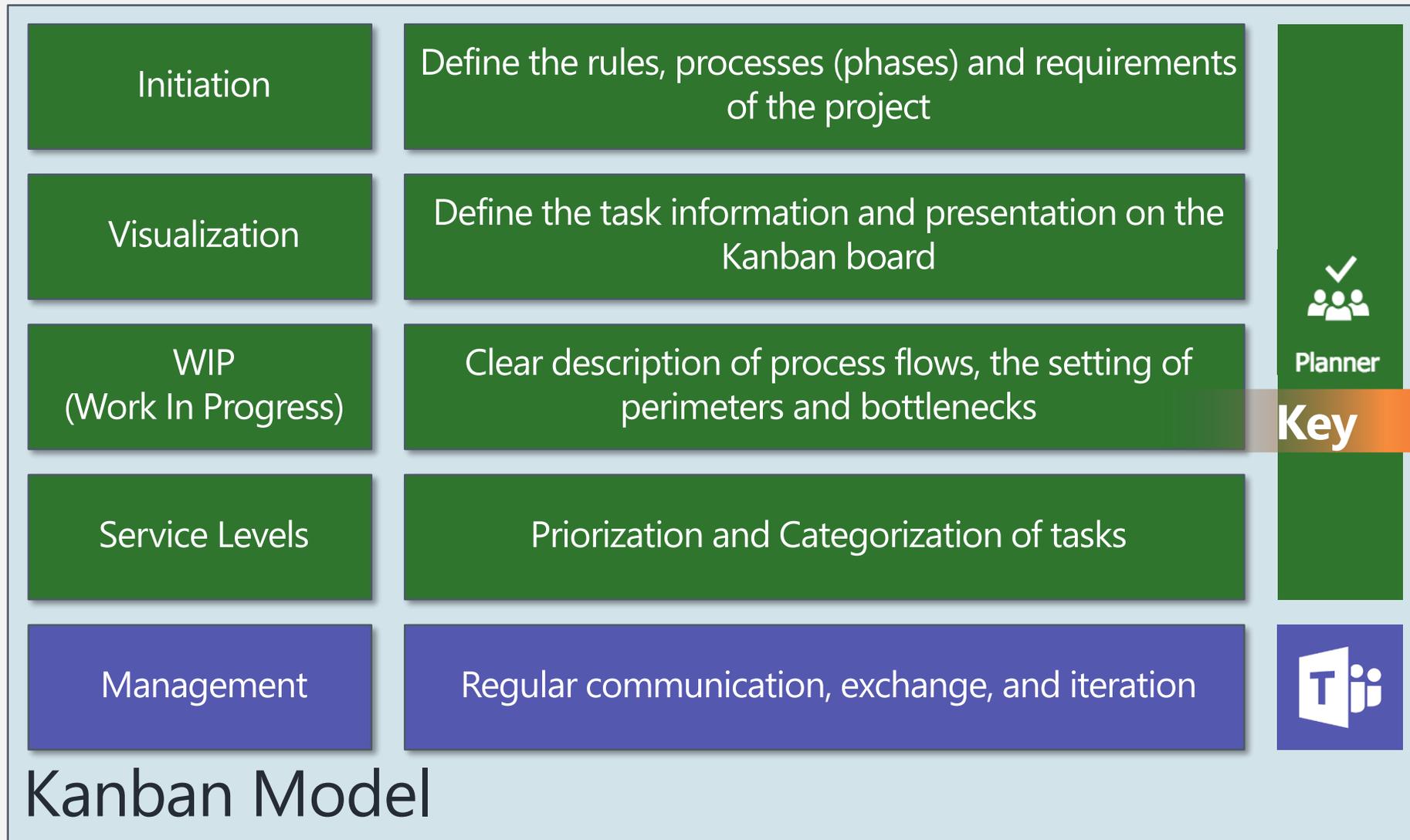
I also use ToDo...!

# ToDo vs. Planner vs. Project



Kanban

# Kanban → „Kan“ (Visual) – „ban“ (Card)



**Key** →

1 – 4 weeks  
Max. 2 tasks at a time  
minimizes disruptions and increases quality and on-time delivery

# Demo Time! KANBAN

For details, how to use Planner for Kanban (and what I showed in the demo), please read my blog post:

<https://www.avepoint.com/blog/manage/agile-project-management-teams-planner/>

Scrum



# Scrum (Project) Roles and Tasks

## 1. Product Owner (Project Owner)

- responsible for project success and prioritize technical requirements

## 2. Scrum Master (Coach)

- kind of moderator to ensure all processes are followed correctly
- eliminate obstacles preventing effective teamwork

## 3. Scrum Team (Team)

- Team members, who work goal-oriented and be able to work independently on their own tasks

## Stakeholders → which Manifest item?

- a) the clients, b) the eventual end users, or c) the management of corresponding project



# Scrum Artifacts

## Requirements

- These are the goals of the clients (stakeholders)
- should be described as “User Stories” – not in technical form

"No training needed, it's obvious how it works."  
**Gail Doss**

## Sprint Backlog

- Consists of work packages that describe the features and functions of each product/project
- defined as concrete tasks (sometimes with subtasks) and worked off in a “Sprint”

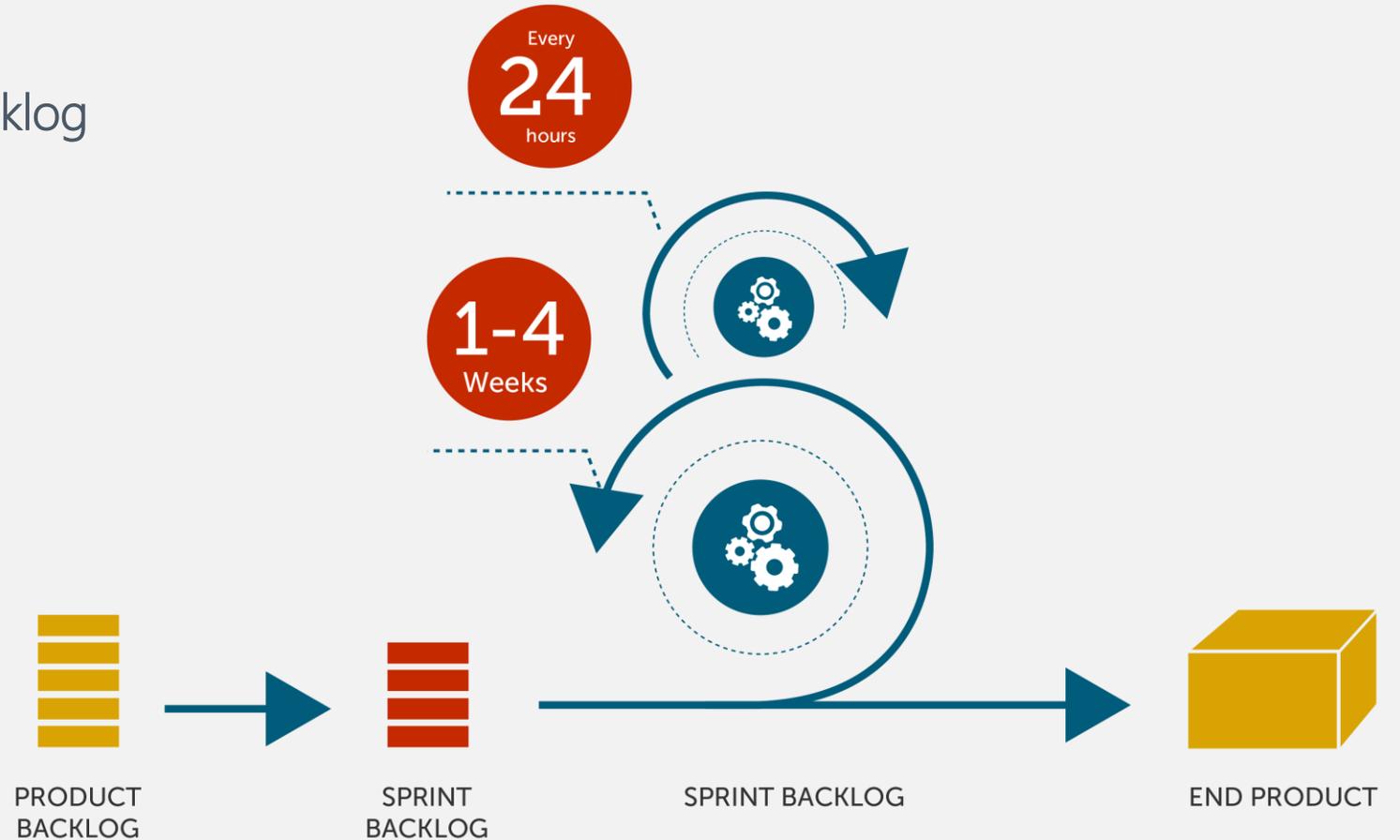
## Product Increment → which Manifest item?

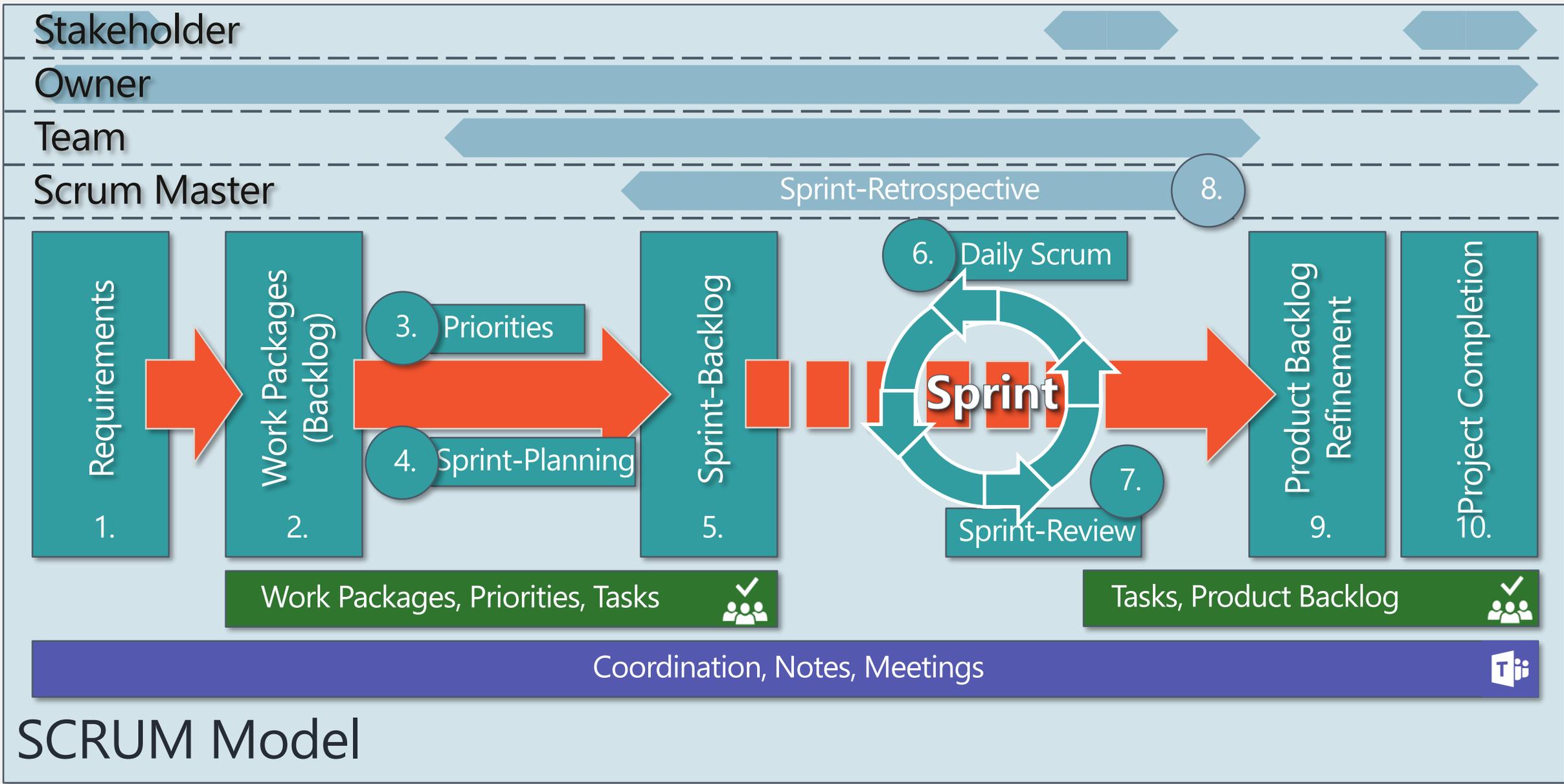
- sum of all items completed during a sprint
- must be either semi-functional versions after a sprint or the finished product at the end



# Scrum Process

1. Requirements in Story Cards
2. Work packages in the product backlog
3. Priorities
4. Sprint Planning
5. Tasks in the sprint backlog
6. Meetings in Scrum
7. Sprint Review Meeting
8. Sprint Retrospective
9. Product Backlog Refinement
10. Project completion





# SCRUM Model



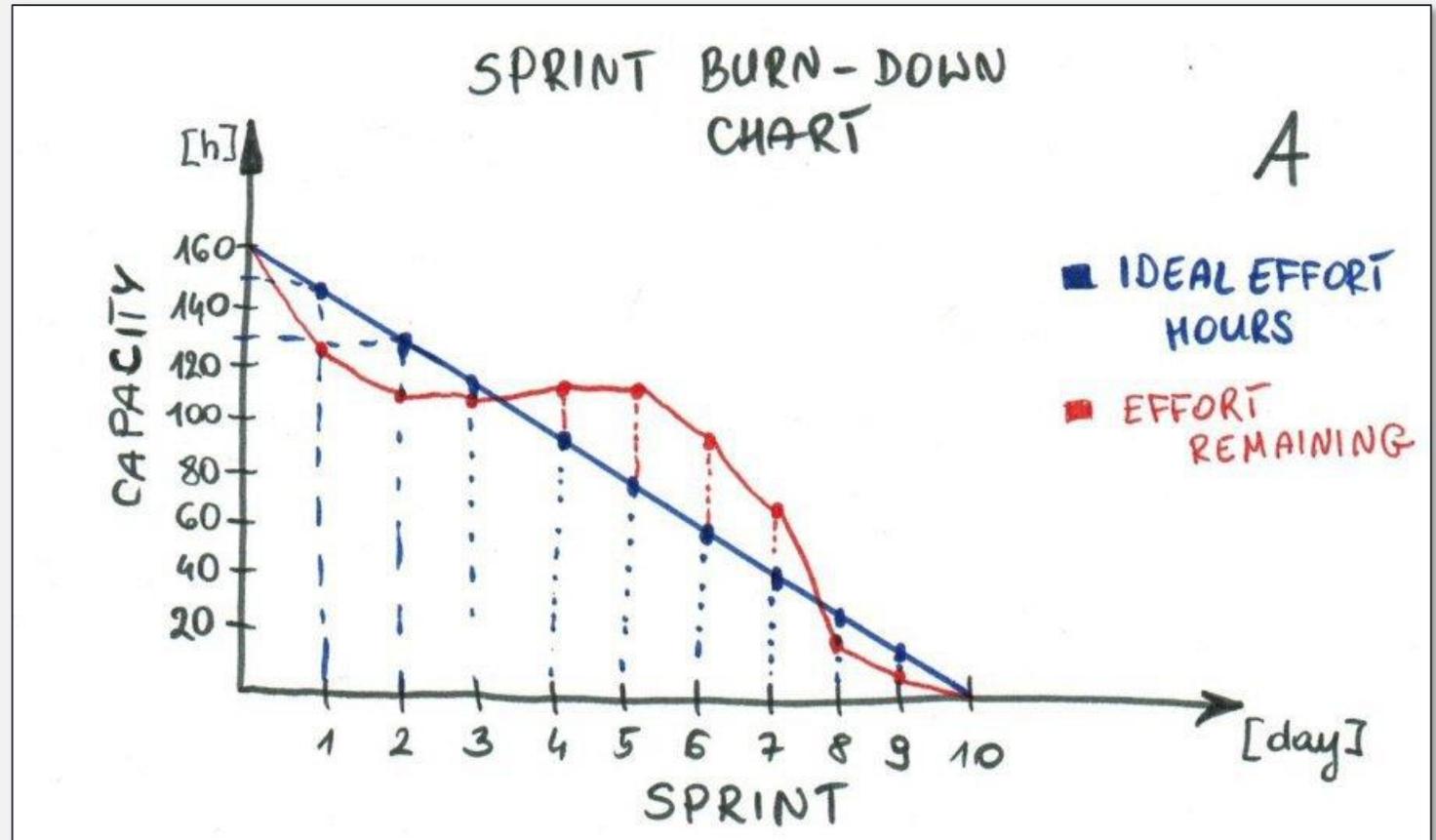
# Demo Time! SCRUM

For details, how to use Planner for Scrum (and what I showed in the demo), please read my blog post:

<https://www.avepoint.com/blog/manage/scrum-microsoft-teams-planner/>

# Limitations

- Burn-Down-Chart
- Prioritization (6 Labels)
- Ticket-Lifecycle
- Audit Changes
- ~~Backup~~  
→ possible with AvePoint



# Bonus: Further Agile Working Examples

- Meeting Management

**TSP EMEA** Board

**New Tasks**

- Sow Templates
  - Create new legally signed SoW Templates fo
  - EDS for AvePoint Cloud Backup
  - EDS for AvePoint Governance
  - EDS for AvePoint Compliance
  - EDS for AvePoint Records
  - Exchange Migration (target Exchange Online
  - SharePoint Migration (FileShare/SharePoint t
  - Office365 (Teams/Groups) Governance Wor
  - Office 365 (Teams/Groups) Compliance Wor
  - Office365 Onboarding and Adoption Worksl
- FAQ Page
  - Capture the existing questions and check th
  - Check on a regular basis and add relevant in

**In Discussion**

- Central Technical Knowledge Base
  - Copy the existing Knowledge Base content t
  - Make sure the Content is still valid
  - Double check content from GTM to avoid d.
  - Consolidate content: GTM > Pre-Sales, Sales
  - Define Owners of the specific Content and le
  - Improve the classification for better filtering
- NFR - TSP Framework (User Voice)
  - Brainstorm Framework
  - Create an intranet page, where NFR's can be
  - Implement a functionality to vote for feature
  - Test Framework
  - Rollout Framework
  - Notify TSPs

**Implementing**

- Hybrid infrastructure DEMO environment
  - Create an Exchange onpremise Test environme
  - Make sure the Exchange hybrid environment
- Link Repository
  - Create a new intranet page, where all necess
  - Add TOP links as a webpart into the Welcom

**Completed**

Erledigte anzeigen 14

- Sales Opportunity Work

**Super Company Opp 123** Board

**Stage 1 - Qualification**

- Understand landscape
- Complete Stakeholder Analysis
  - Identify all potential stakeholders
  - Determine Champion / Sponsor
  - Initial contacts are favourable to AvePoint
  - Stakeholder Analysis documented in Opport
- MILESTONE: Opportunity Review
  - Formal Opportunity Plan created and shared
  - Opportunity Plan reviewed with 1st Line Sale
  - Go / No-Go Approval

**Stage 2 - Solution Build**

- Avepoint Sales Management on-site qualification meeting
- Competitive solution review
- Establish initial ROI & access to funds
  - task 1
  - Task 2

**Stage 3 - Proving Value**

- Alignment meeting with Microsoft Account Manager
- MILESTONE: Confirm Technical Selection
- Confirm solution delivery plan
  - Statement of Work agreed internally

**Stage 4 - Secure Commitment**

- AvePoint Cloud Security t and approved by Custom
- CSF 35: Confirmation of T
  - Verbal / written confirma
  - Customer confirmed Ave
- CSF 36: Commitment to p timeline confirmed
  - Confirmed customers pur
  - Confirmed commitment t
  - Customer facing activities
- Initial Contract Review
  - AvePoint standard MSLA
  - Legal contacts confirmed
  - Timeframe and any relev



# Summary

- Kanban + Scrum works great for smaller projects
  - Even for Non-Software-Projects
- Teams + Planner support Agile Project Management methods
  - Even further agile working frameworks can be used, i.e.
    - Meeting Management
    - Sales Opportunity Work
- Some Limitations for managing projects at larger scale
- Roadmap:
  - Multiple Plans per Group/Team
  - ToDo + Project Integration
  - Teams Channel Security Trimming

# Thank you

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Gracias

ευχαριστώ

Danke

Grazie

благодаря

Hvala

Obrigado

Kiitos

شكراً

Tak

Ahsante

Teşekkürler

متشكراً

Salamat Po

감사합니다

Cám ơn

شكراً

Terima Kasih

Dank u Wel

Děkuji

நன்றி

Köszönöm

ありがとう  
ございます

ឧបត្ថម្ភការណ៍

Dziękuję

谢谢

Tack

Mulțumesc

спасибо

Merci

תודה

多謝晒

дядкую

Ďakujem