



Microsoft 365
COMMUNITY CONFERENCE

Planner, Copilot, and Agents

AI Assisted Projects with Work IQ

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Howard Crow

Partner Director
Chief Plannerd



Robyn Guarriello

Senior Product Manager,
Microsoft Planner

Every organization is transforming into a Frontier Firm

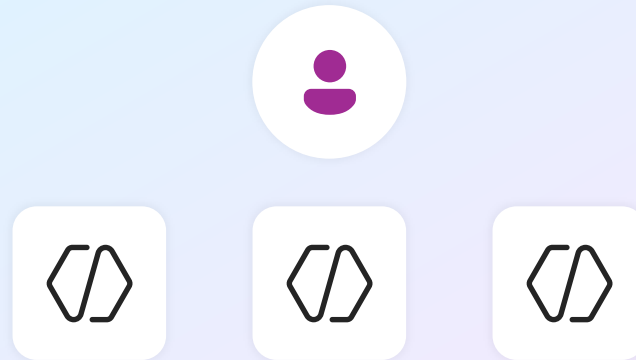
Pattern 1

Human with
assistant



Pattern 2

Human-agent
teams

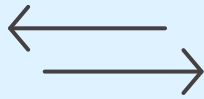


Pattern 3

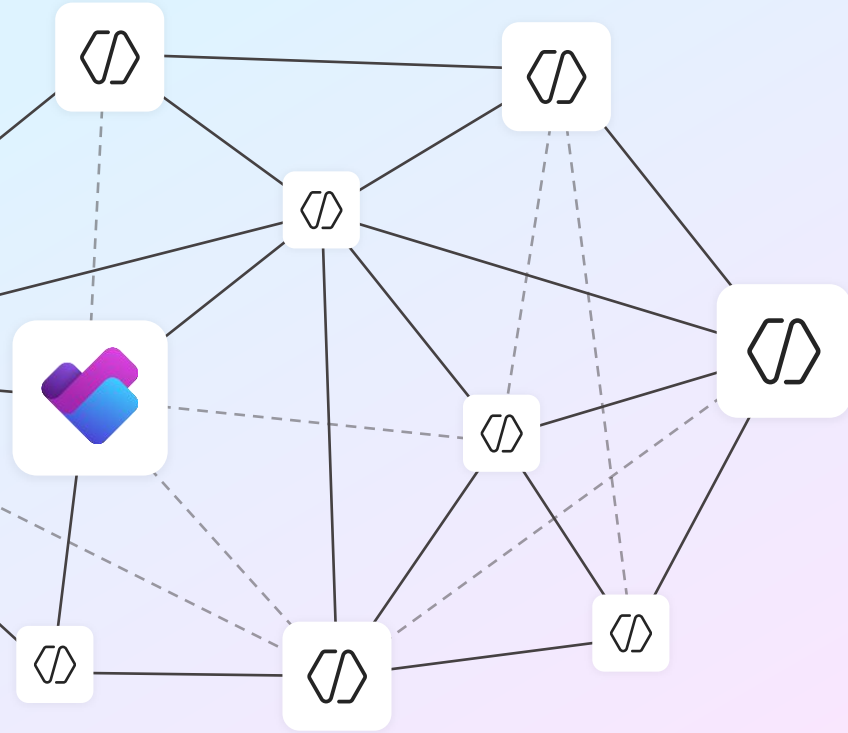
Human-led,
agent operated



Copilot Control System



Copilot



Agents

Projects are the backbone of your organization

110M

certified, professional,
and informal project
managers¹

~25%

of your organization
manages projects¹

From managing work to getting work done

¹Estimates based on industry analysis.



Planner Agent



Alex Wilber

Mobile App Engineer,
Zava

- AlexW@M365x421...
- Inbox 209
- Drafts
- Sent Items
- Deleted Items 30
- Junk Email
- Notes
- Archive
- Conversation Histo...
- Search Folders
- In-Place Archive -A...
- Go to Groups

Focused Other

- Other Emails (2)
Microsoft on behalf of your organization
- This week
 - Adele Vance
Zava Trainer Mat Daily Standup Sun 12:51 PM
Align on daily priorities and unblock critical tasks f...
 - Adele Vance
Zava Trainer Mat Daily Standup Sun 12:40 PM
Align on daily priorities and unblock critical tasks f...
Occurs every day from 1:00 PM to... No conflicts **RSVP**
 - Adele Vance
Mars's open tasks – can you take a l... Sun 11:24 AM
Alex, Following up from standup this morning. No...
 - Adele Vance
Welcome back! – A few things need... Sun 11:24 AM
Alex! Welcome back! Hope the trip was everything ...
 - Robyn Guarriello
Zava Trainer Mat - Social Media Cal... Sun 11:24 AM
Hi Alex, Following up on my message from last we...
 - Adele Vance
Zava Trainer Mat — shipping spec u... Sun 11:24 AM
Alex — forwarding this for when you're back. Can y...

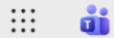


Select an item to read
Nothing is selected



Adele Vance

Product Manager,
Zava



Activity



Chat



Calendar



Calls



OneDrive



Copilot



Apps



Planner (Frontier)

Focus on

Start a chat to manage your tasks and plans.



Explore

History



Prioritize work

Help me plan my tasks for this week.



Create new tasks

Draft new tasks from my meetings, emails, and chats



Update existing tasks

I'm on leave today so move all my tasks to tomorrow

Available in Frontier:

Manage your Tasks with Planner Agent in Copilot

Find tasks across Microsoft 365

Understand work in context

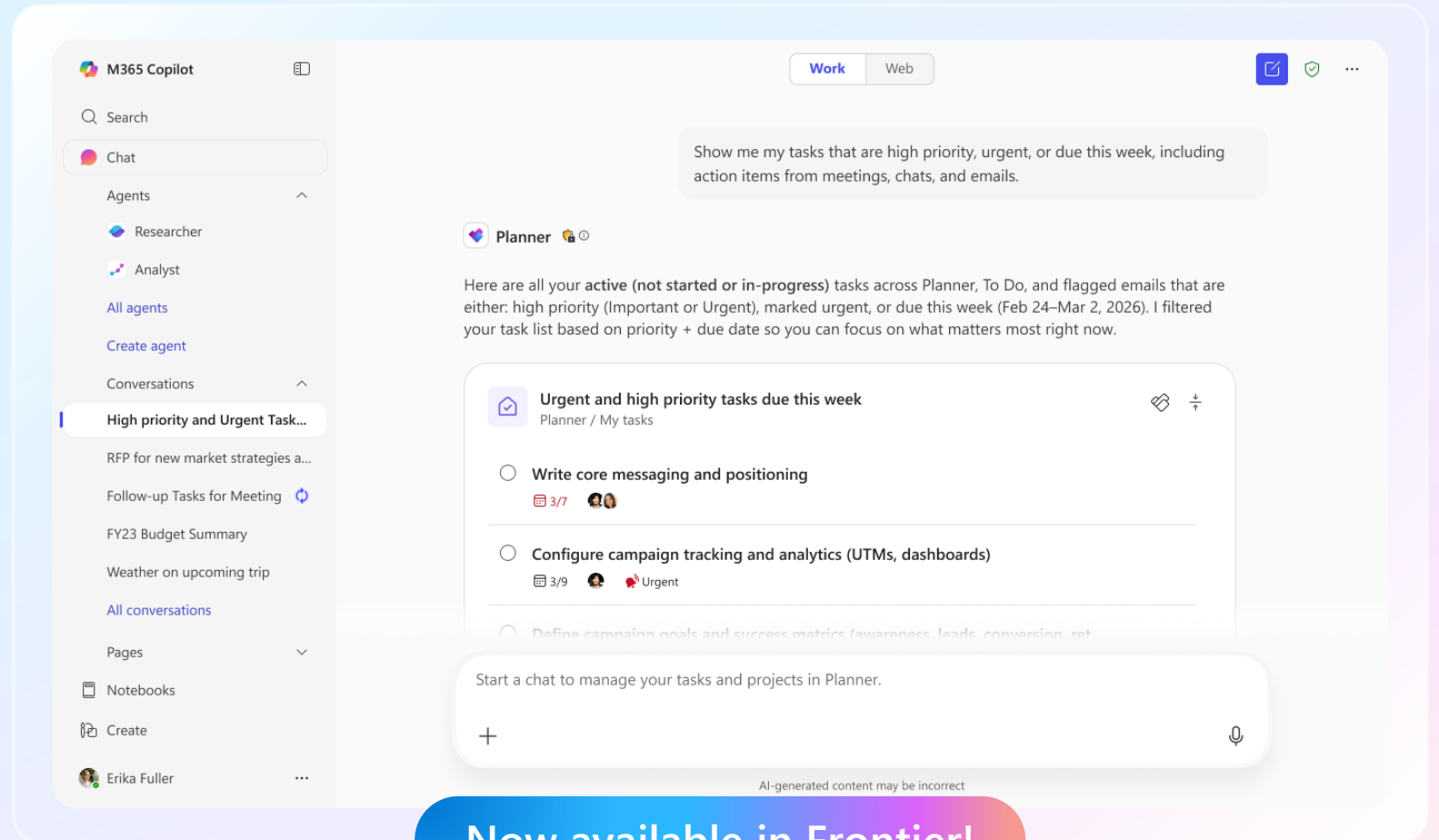
Track and update tasks in
Planner

Personal tasks

Unified plans

Backed by Work IQ

*Access to Copilot Chat requires a Microsoft 365 Copilot license.



Now available in Frontier!

Available in Frontier:

Plan creation in Microsoft 365 Copilot and Planner Agent

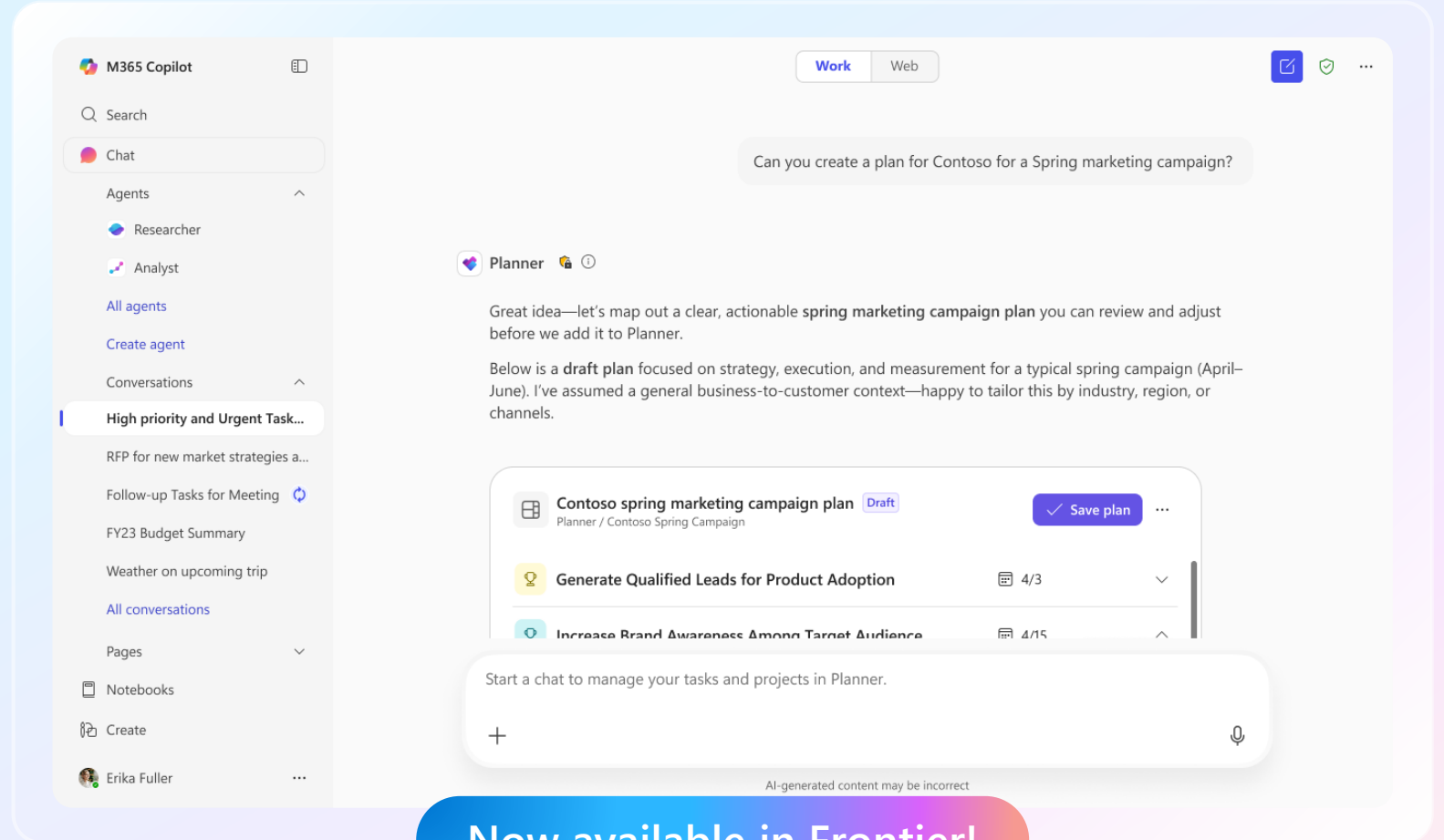
Generate unified plans

Understand timelines

Work towards a goal

Full plan including goals, notes, details, buckets...

Backed by Work IQ



*Access to Copilot Chat requires a Microsoft 365 Copilot license.

Now available in Frontier!

Coming soon:

Planner skills in Microsoft 365 Copilot Chat



Direct integration with
Microsoft 365 Copilot
Chat



Access Planner data from
any Copilot chat across
Microsoft 365



Act on plan data without
having to switch context

Coming soon

*Access to Copilot Chat requires a Microsoft 365 Copilot license.

Coming soon: Status Reports in Planner Agent

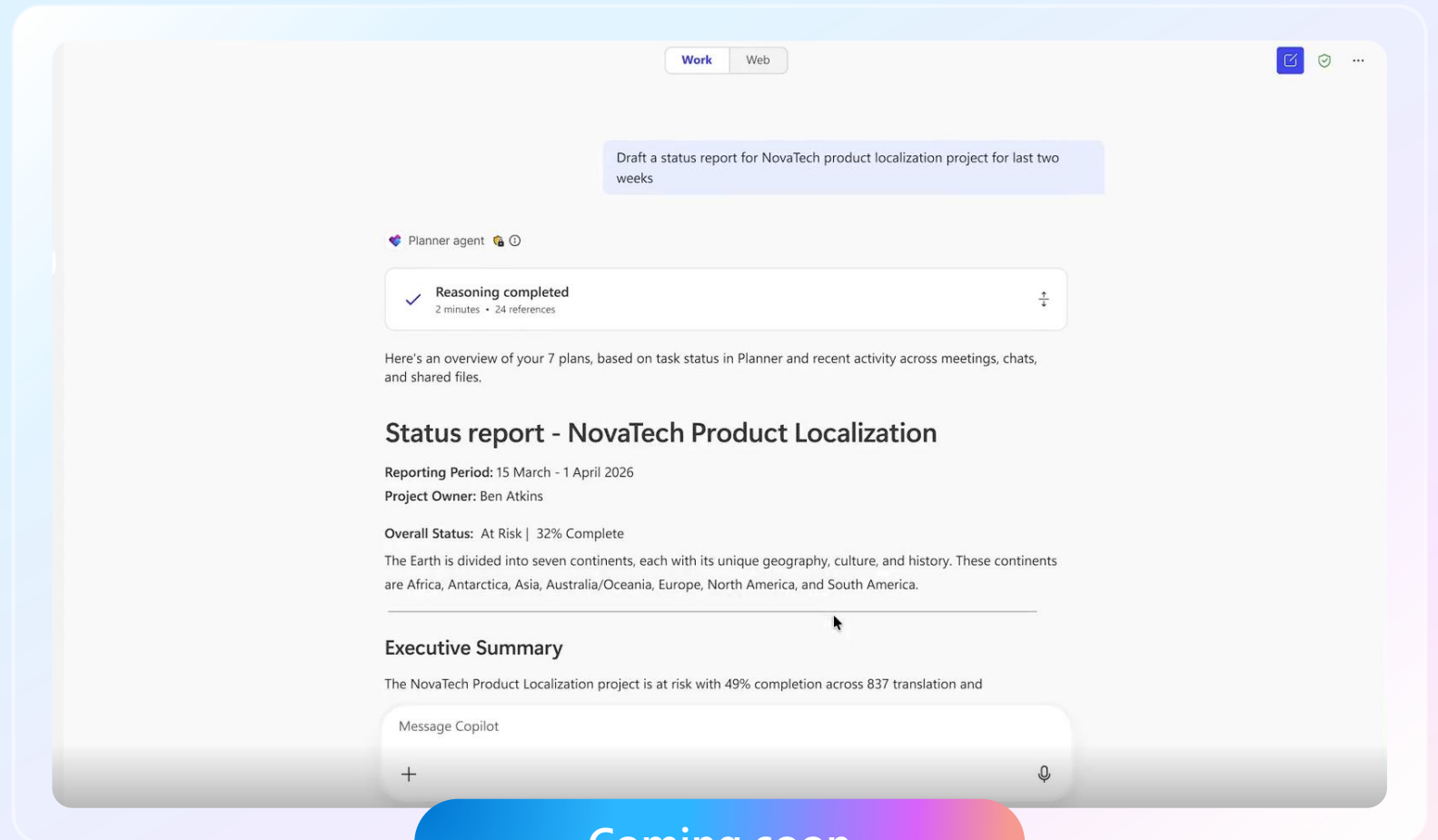
Synthesize plan health

Highlight risks and milestones

Deliver a shareable report

Charts and visualizations

Backed by Work IQ



*Access to Copilot Chat requires a Microsoft 365 Copilot license.

Coming soon

Coming soon:

Portfolio analysis in Microsoft 365 Copilot

Q&A

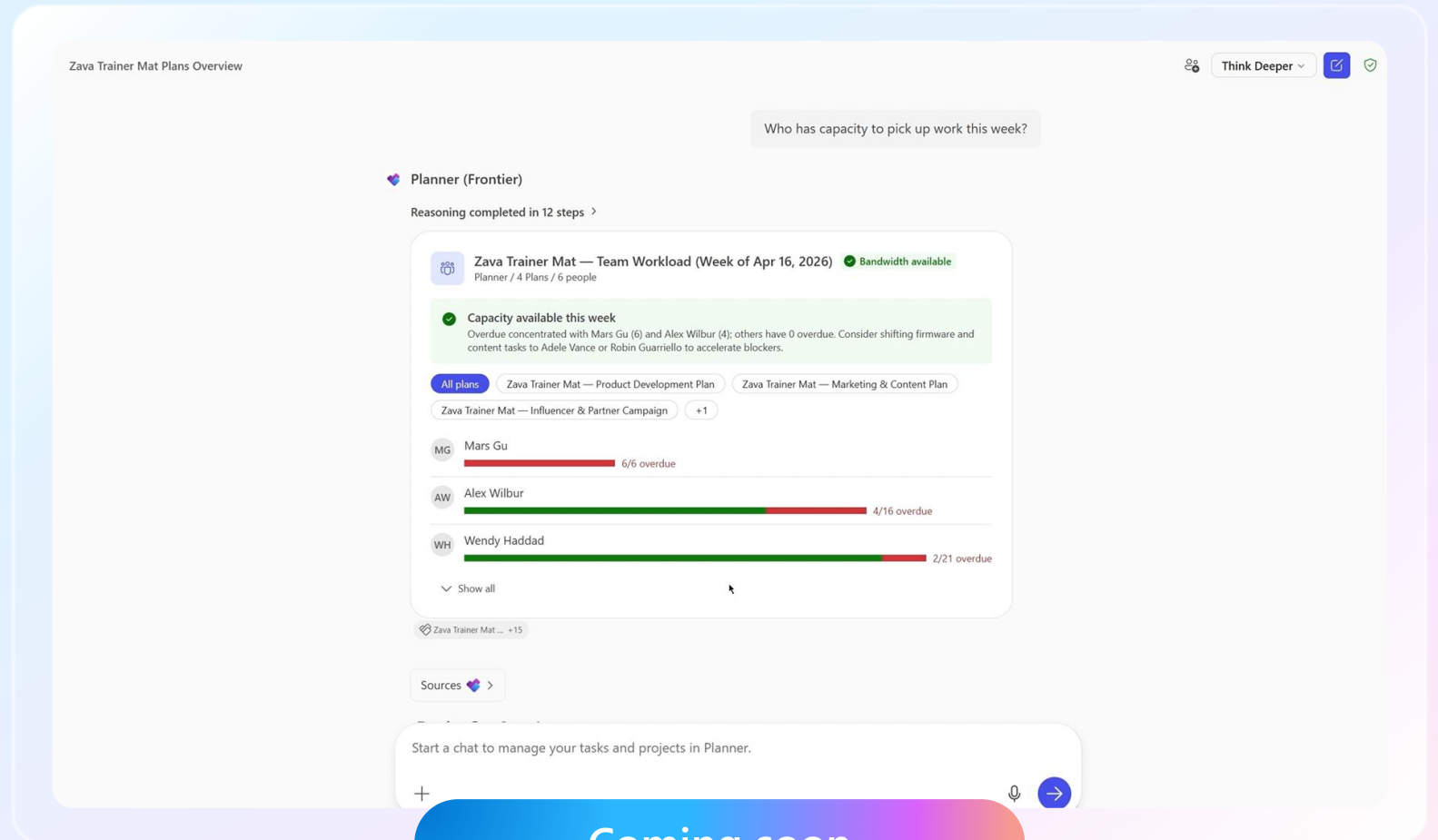
Analyze risks

Understand portfolio status

Allocate resources
appropriately

Backed by Work IQ

*Access to Copilot Chat requires a Microsoft 365 Copilot license. Please note, adding a member to the portfolio does not give the user access to the plan(s) included in the portfolio, but rather enables them to see the portfolio-level aggregations.



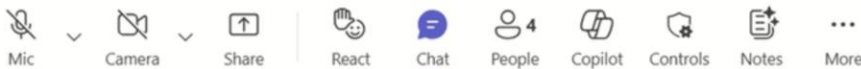
Coming soon



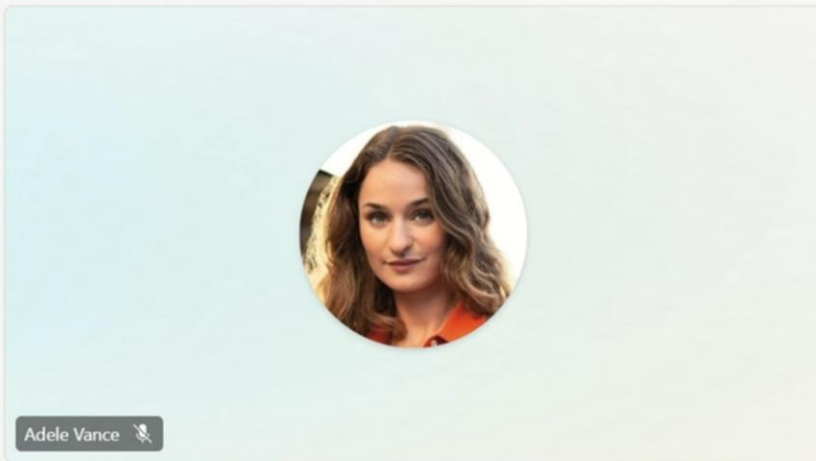
Planner in Microsoft Teams



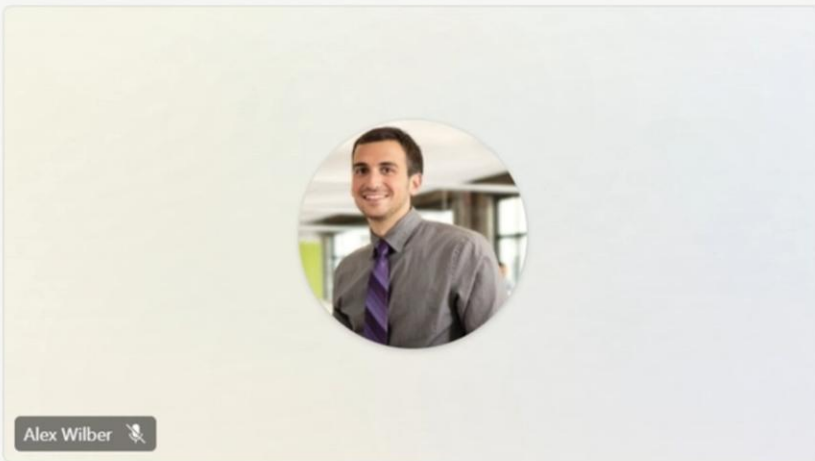
06:21



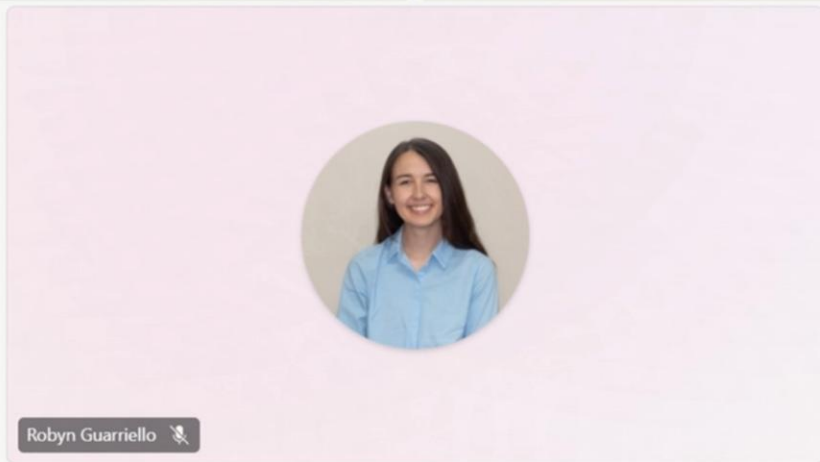
- Review and update status of overdu... 8:00
- Confirm revised deadlines and resp... 8:00
- Discuss blockers and resource... 7:00
- Align on next steps needed -3:49



Adele Vance

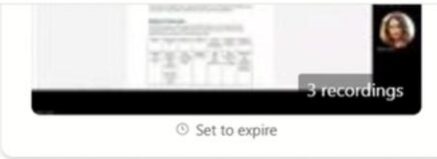


Alex Wilber



Robyn Guarriello

Meeting chat



- Monday 10:36 PM Recording stopped.
- Wendy no longer has access to the chat.
- Monday 10:37 PM Recording has been saved to Adele Vance's OneDrive.

Today

- 1:29 PM Meeting started
- 1:29 PM Recording started automatically per the organizer's setting.

Last read

Facilitator 1:30 PM

Here's the agenda from the invite:

- Review and update status of overdue tasks (8 min)
- Confirm revised deadlines and responsible owners for key deliverables, ensuring visibility in Planner (8 min)
- Discuss blockers and resource needs (7 min)
- Align on next steps needed (7 min)

Add topic

Type a message

Rich text editor icons: Bold, Italic, Underline, Link, Image, Send

Coming soon:

Update existing plans in Microsoft Teams meetings

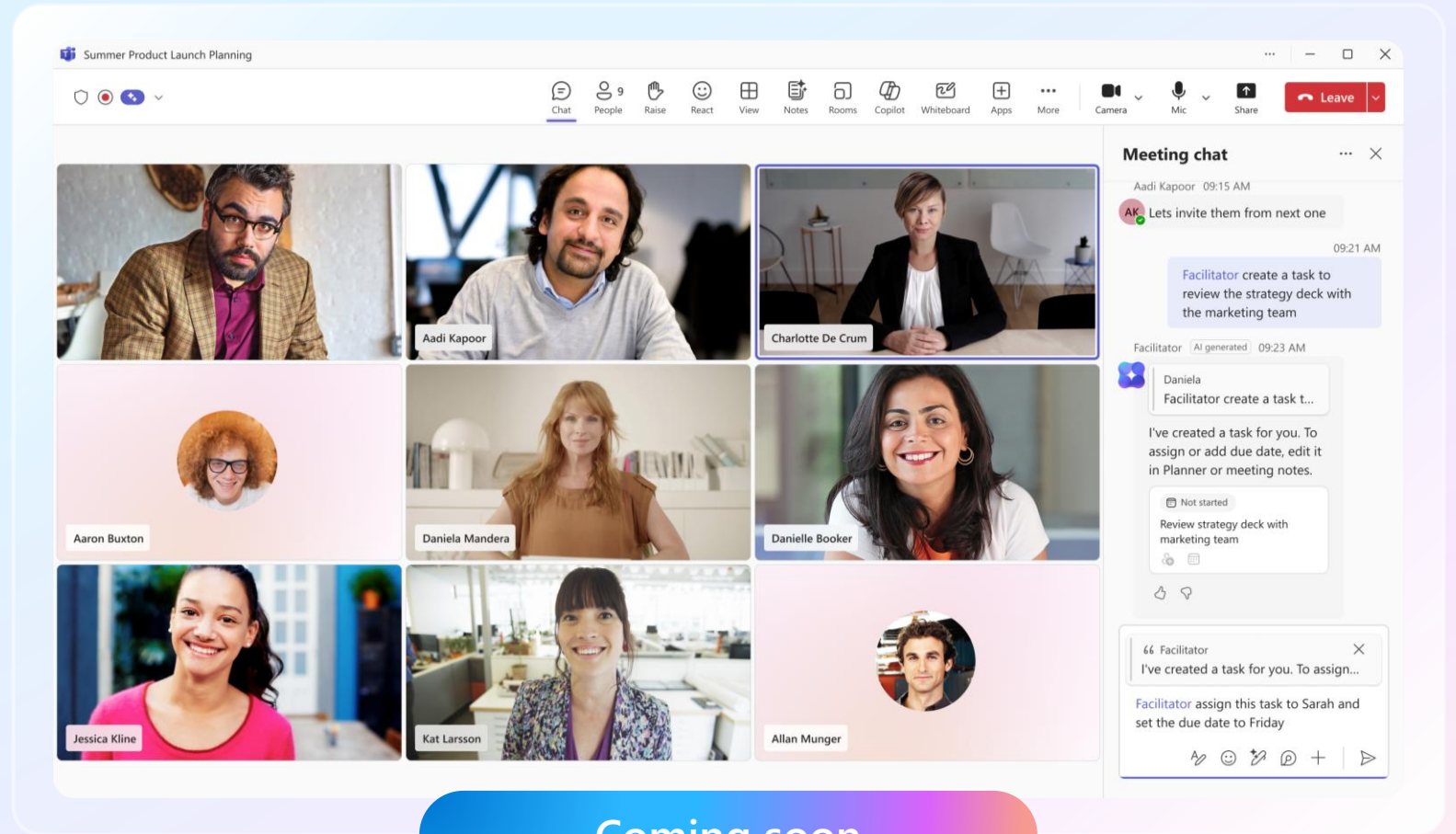
Choose an existing plan

Sync tasks to existing plans

Generate documents during
Teams meetings

Capture action items

Review pending work



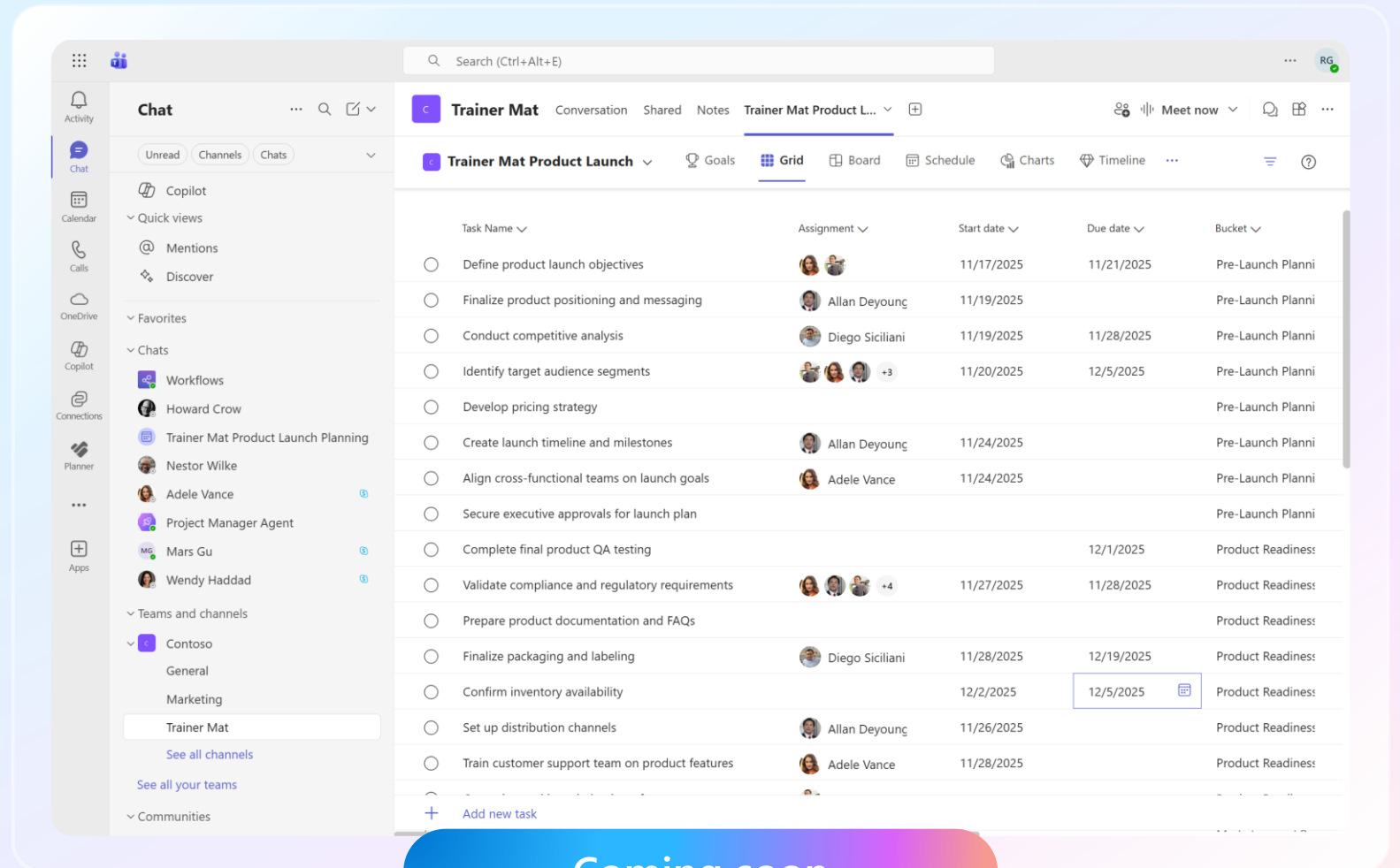
Coming soon

Coming soon: Planner in private and shared channels

Create plans in shared channels

Backed by a lightweight group

Unified plans



Coming soon



The evolution of Planner

No bucket

+ Add task

Ready

What is an API connector and how it enables measurement of influencer campaign performance

4/28

Review the social content calendar and send to Robyn by noon today (Alex)

Review guided workout onboarding flow

Review and approve onboarding flow for guided workouts in the Zava Trainer Mat experience.

Hardware Design & Validation

+ Add task

Finalize pressure sensor grid layout and tolerances

4/28

Validate mat durability under 250lb load testing

4/30

Review and sign off on final BOM (bill of materials)

5/2

Manufacturing Readiness

+ Add task

Approve final product photography samples from factory

4/16

Confirm production run quantity with Shenzhen supplier

4/25

Review and approve final packaging spec and colorways

4/20

Mobile App Development

+ Add task

Finalize real-time form-feedback UI and haptic cues

4/30

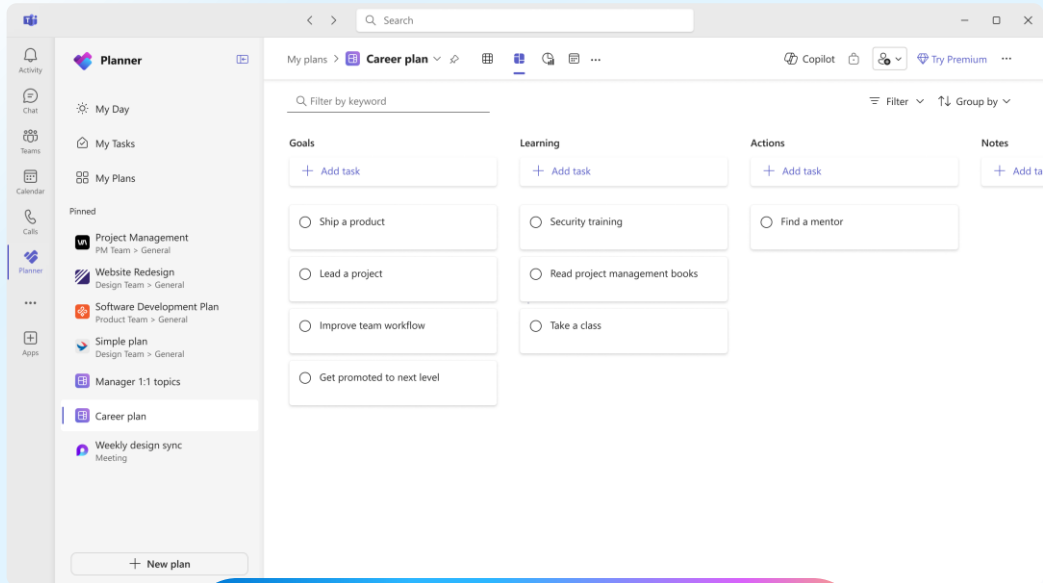
Complete guided workout onboarding flow (iOS + Android)

Complete guided workout onboarding flow for iOS and Android.
Risk: BLE / SDK timing risk due to...

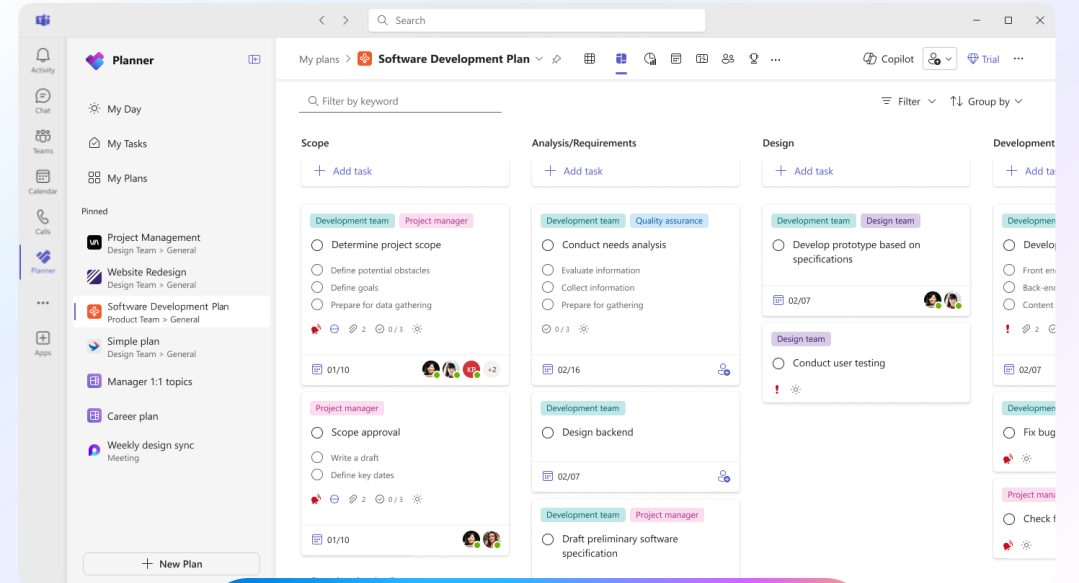
4/26

Implement AI coaching subscription paywall and trial flow

Planner is unifying...



Basic plans



Premium plans

A unified plan type for all

The screenshot displays a project planning tool interface for a project named "FHL Project". The interface is organized into four main columns: Scope, Analysis/Requirements, Design, and Development. Each column contains a list of tasks with various status indicators and team assignments.

Scope

- Ready (Design Team, Research)
- Determine project scope
 - Define potential obstacles
 - Define goals
 - Prepare for data gathering

Analysis/Requirements

- Research (Primary text)
- Conduct needs analysis
 - NeedsAnalysisPlanning.pptx
 - 05/01
- Ready (Design Team, Research)
- Design backend
 - 05/01
- Design Team (Primary text)
- Draft preliminary software

Design

- Design Team (Research, Primary text)
- Conduct market research to identify target audience
 - 1/13
 - 04/21
- Design Team (Research)
- Conduct user testing
 - 04/18
- Completed (7)
- Design Team (Research)
- Semester planning
 - Completed by Babak Shammass on 04/18

Development

- Ready (Design Team, Research)
- Develop code for MVP
 - Front end
 - Back end
 - Content integrations
- 04/21
- Fix bugs and polish ui
 - 1/13
- Research
- Accessibility Review

Incremental rollout underway

Unified plan features

Board view

Buckets

Charts view

Custom fields

Dependencies

Purview Support

Goals view

Grid view

High task limit

Labels

Planner Agent

Recurring tasks

And more...

Schedule view

Scheduling

Standard task fields

Task Chat

Task hierarchy

Timeline view

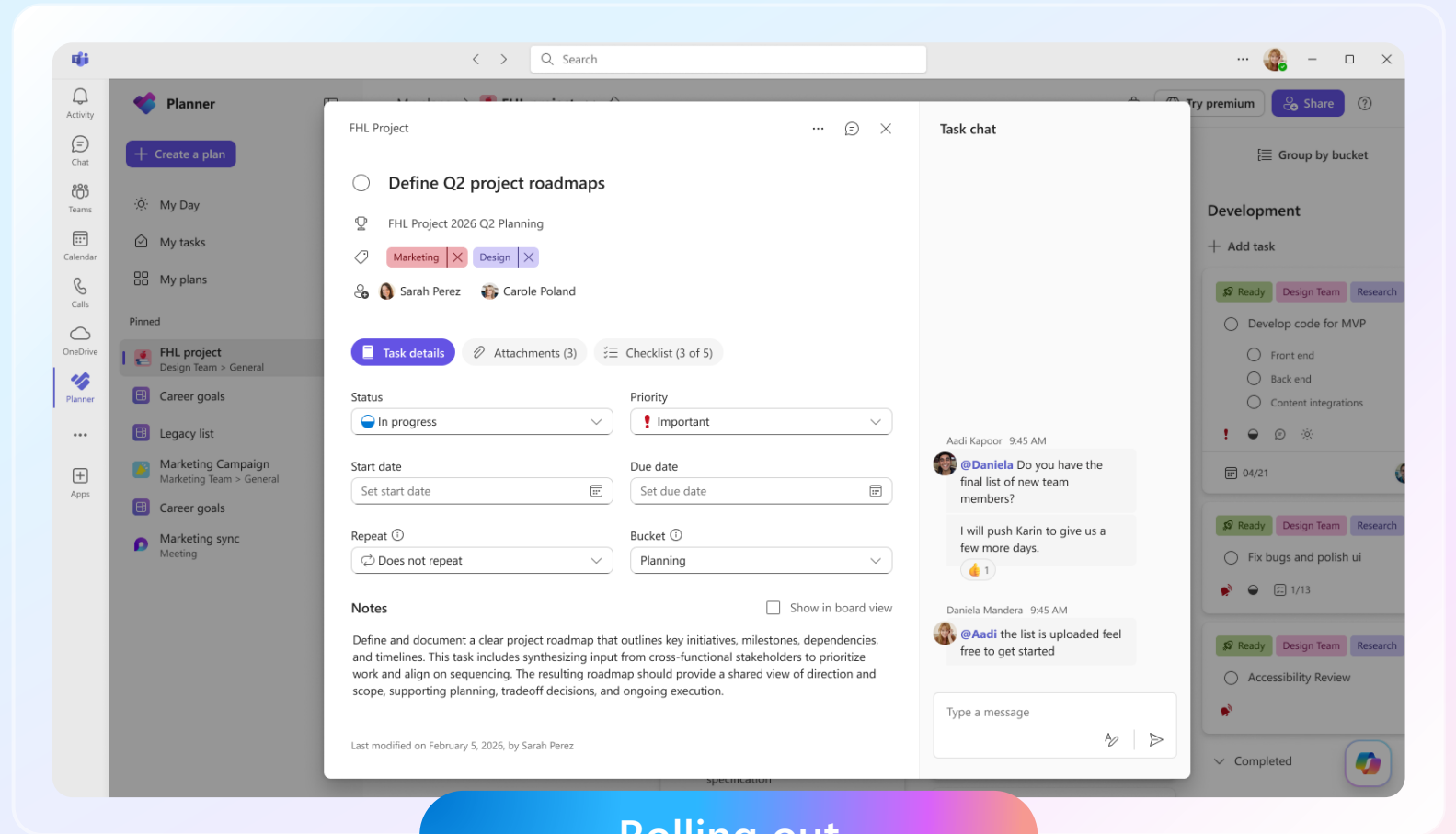
Feature access is determined by license, not plan type

Rolling out: Task chat in Planner

Threaded conversations for every task

Use task chat when you need quick input on a task

Complete with rich formatting, notifications, and emoji reactions



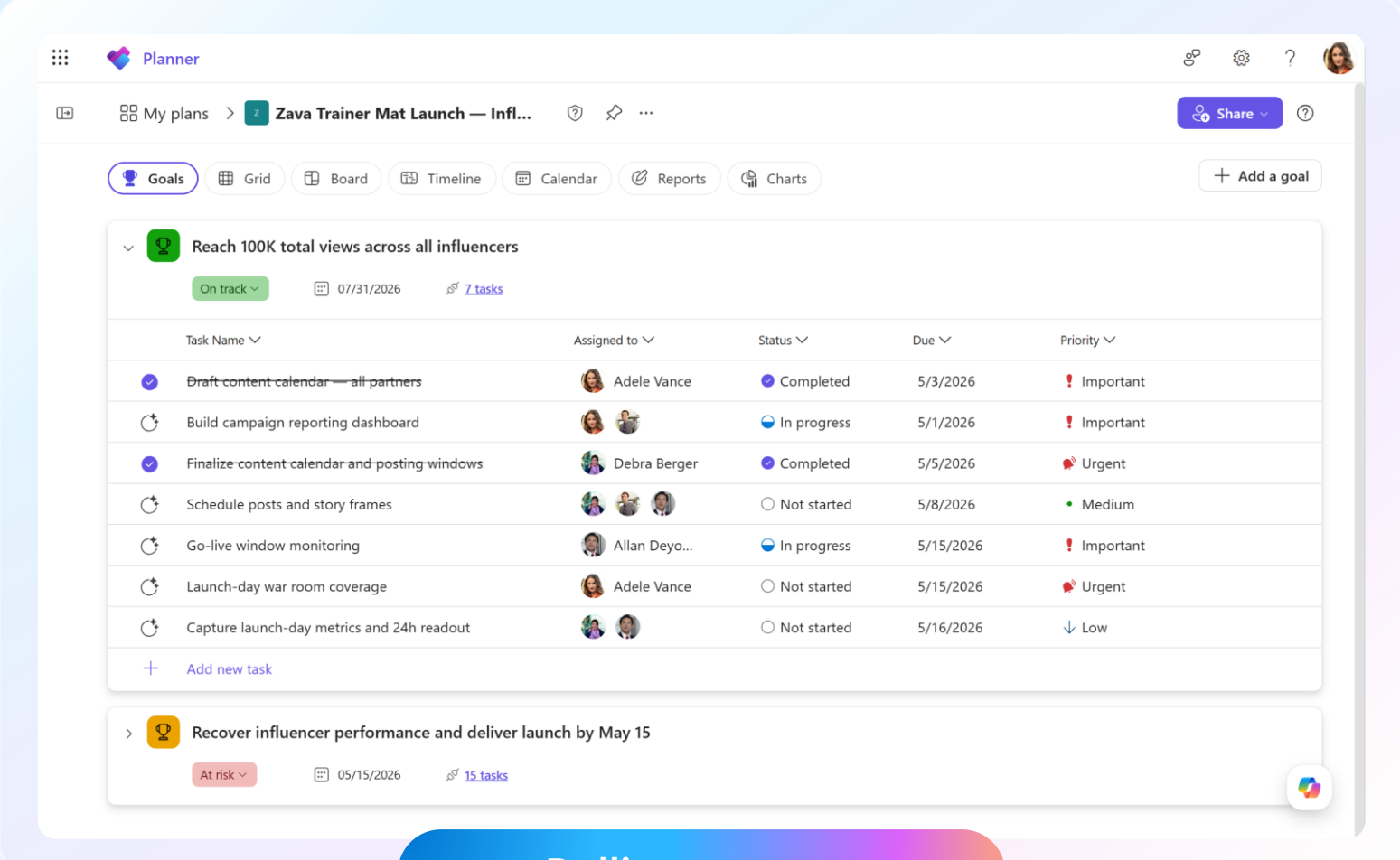
Rolling out

Rolling out now: Goals available in all plans

Goals in unified plans

Link tasks to goals

Increased goal limits



The screenshot displays the Microsoft Planner interface. At the top, the 'Planner' logo is visible. Below it, the breadcrumb navigation shows 'My plans > Zava Trainer Mat Launch — Infl...'. A 'Share' button is located in the top right corner. The main navigation bar includes 'Goals', 'Grid', 'Board', 'Timeline', 'Calendar', 'Reports', and 'Charts', with 'Goals' selected. A '+ Add a goal' button is also present. The main content area shows two goal cards. The first goal is 'Reach 100K total views across all influencers', which is 'On track' with a due date of 07/31/2026 and 7 tasks. The second goal is 'Recover influencer performance and deliver launch by May 15', which is 'At risk' with a due date of 05/15/2026 and 15 tasks. The first goal's tasks are listed in a table below.

Task Name	Assigned to	Status	Due	Priority
Draft content calendar — all partners	Adele Vance	Completed	5/3/2026	Important
Build campaign reporting dashboard	Adele Vance, Debra Berger	In progress	5/1/2026	Important
Finalize content calendar and posting windows	Debra Berger	Completed	5/5/2026	Urgent
Schedule posts and story frames	Adele Vance, Debra Berger, Allan Deyo...	Not started	5/8/2026	Medium
Go-live window monitoring	Allan Deyo...	In progress	5/15/2026	Important
Launch-day war room coverage	Adele Vance	Not started	5/15/2026	Urgent
Capture launch-day metrics and 24h readout	Adele Vance, Debra Berger	Not started	5/16/2026	Low

*Access to Goals requires a Planner Plan 1, Planner and Project Plan 3, or Microsoft 365 Copilot license.

Rolling out now

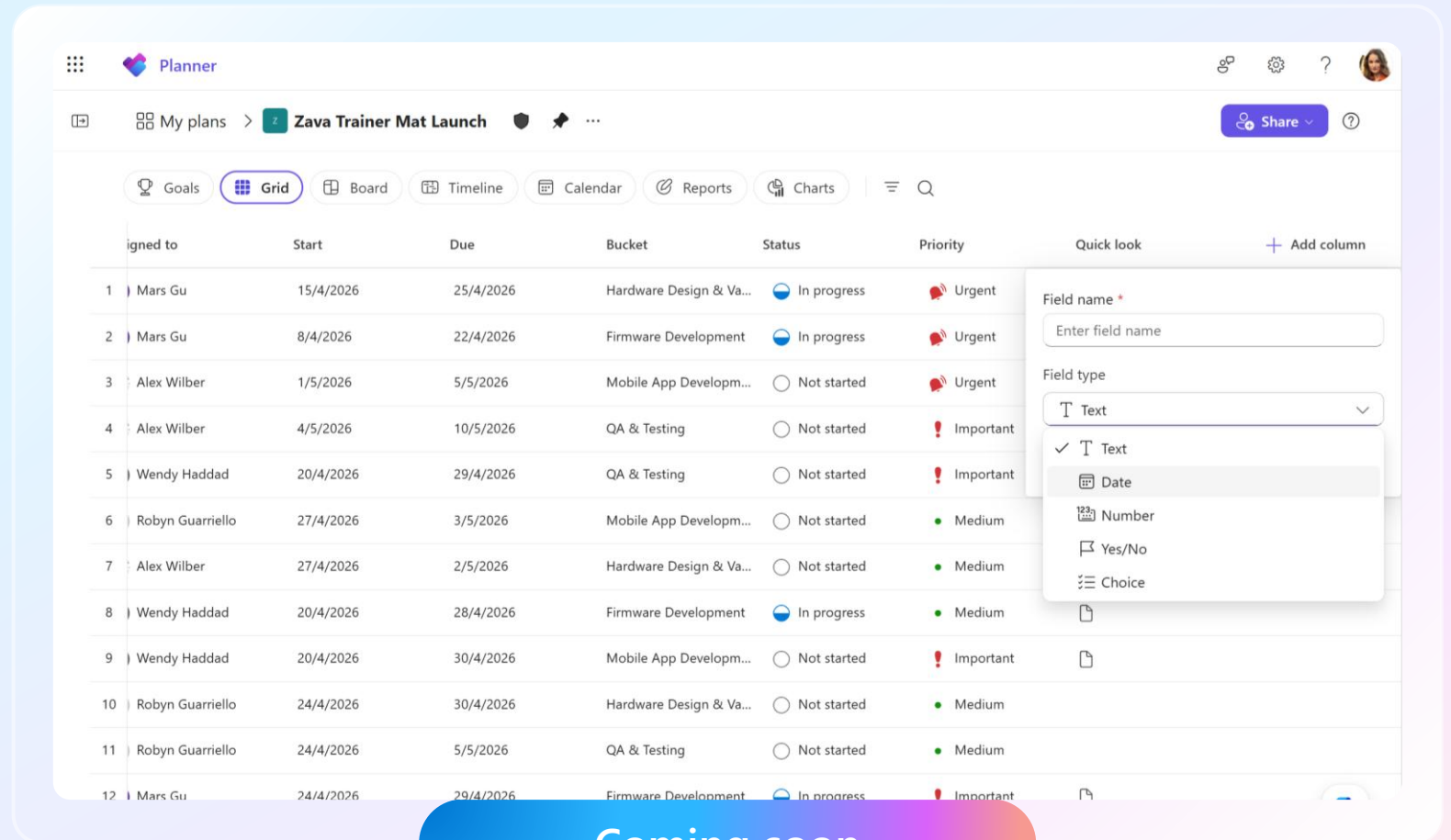
Coming soon:

Custom columns available in all plans

Custom columns in all plans!

Text, Date, Number, Yes/No,
and Choice

Available in MCP



Coming soon

*Custom columns requires a Microsoft 365 Copilot license.

Coming soon:

Dependencies available in all plans

Dependencies in all plans

Four dependency types

Manual mode

New high-performance grid

Larger task scale

The screenshot shows the Planner application interface for a project named "Zava Trainer Mat Launch". The interface includes a navigation bar with tabs for Goals, Grid, Board, Timeline, Calendar, Reports, and Charts. A table of tasks is displayed with columns for Task Name, Depends on, Impacts, Assigned to, Start, and Due. A dropdown menu is open over the "Depends on" column, showing a search bar and a "Dependency type" section with four options: "Only starts after" (selected), "Can start with", "Can end with", and "Ends after another starts".

	Task Name	Depends on	Impacts	Assigned to	Start	Due
1	<input type="checkbox"/> Certify EMF emissions compliance with FCC standards			Mars Gu	15/4/2026	25/4/2026
2	<input type="checkbox"/> Complete BLE connectivity module for mat-to-app pairing	Only starts after	Search for a task	Mars Gu	8/4/2026	22/4/2026
3	<input type="checkbox"/> Submit app for Apple App Store and Google Play review			Alex Wilber	1/5/2026	5/5/2026
4	<input type="checkbox"/> Sign off on final QA report			Alex Wilber	4/5/2026	10/5/2026
5	<input type="checkbox"/> Write integration test suite for mat-to-app data sync			Wendy Haddad	20/4/2026	29/4/2026
6	<input type="checkbox"/> Integrate Apple Health and Google Fit sync			Robyn Guarriello	27/4/2026	3/5/2026
7	<input type="checkbox"/> Review and sign off on final BOM (bill of materials)			Alex Wilber	27/4/2026	2/5/2026
8	<input type="checkbox"/> Document firmware API for mobile team handoff			Wendy Haddad	20/4/2026	28/4/2026
9	<input type="checkbox"/> Implement AI coaching subscription paywall and trial flow			Wendy Haddad	20/4/2026	30/4/2026
10	<input type="checkbox"/> Validate mat durability under 250lb load testing			Robyn Guarriello	24/4/2026	30/4/2026
11	<input type="checkbox"/> Conduct beta user acceptance testing session (20 users)			Robyn Guarriello	24/4/2026	5/5/2026
12	<input type="checkbox"/> Integrate firmware with Zava mobile SDK v2.1			Mars Gu	24/4/2026	29/4/2026

Coming soon

*Access to dependencies and subtasks requires a Planner Plan 1 or Planner and Project Plan 3 license.

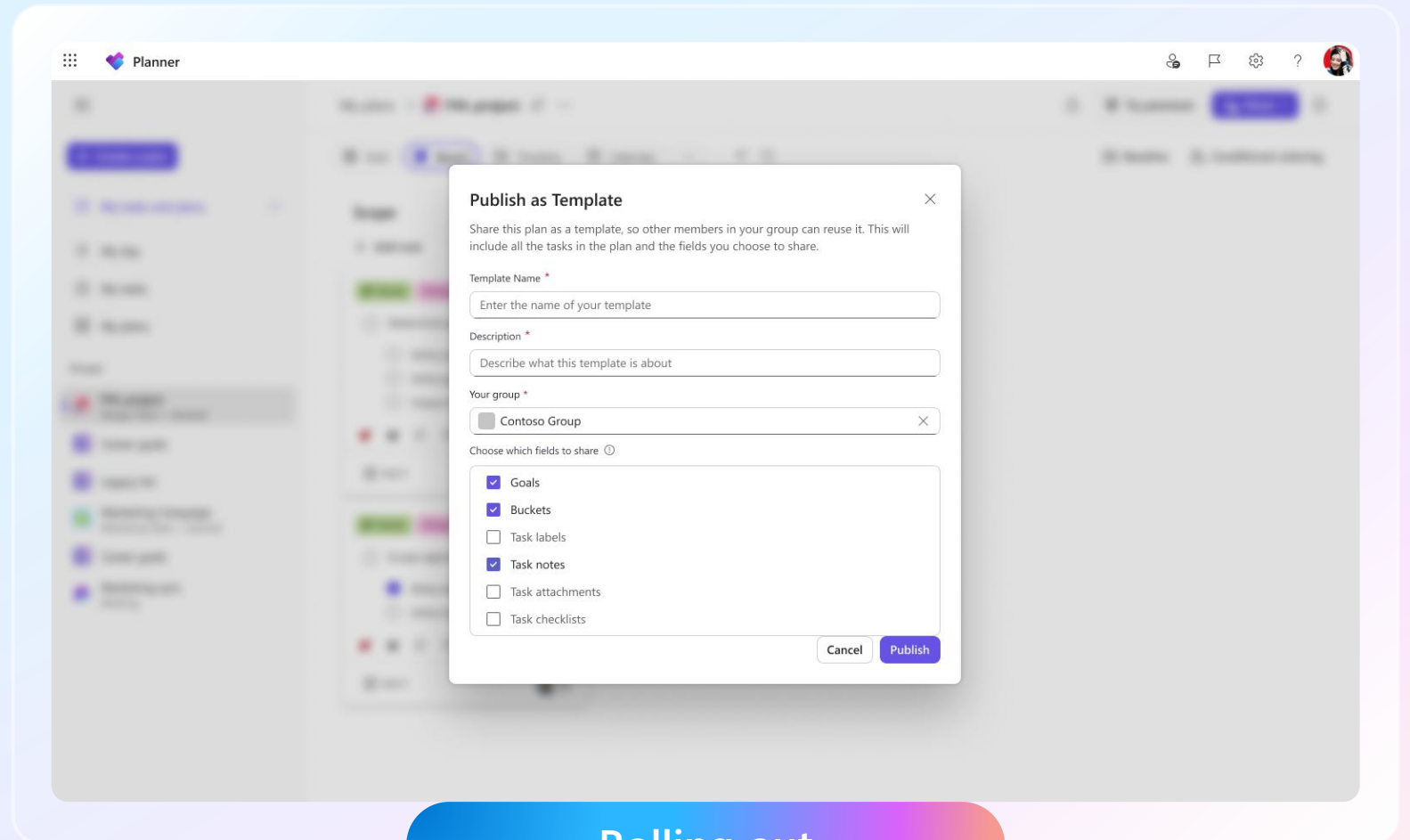
Rolling out: Custom templates in Planner

Streamlined setup for consistency across teams and plans

Save unified plan as template

Select template components

Share with your group



Rolling out

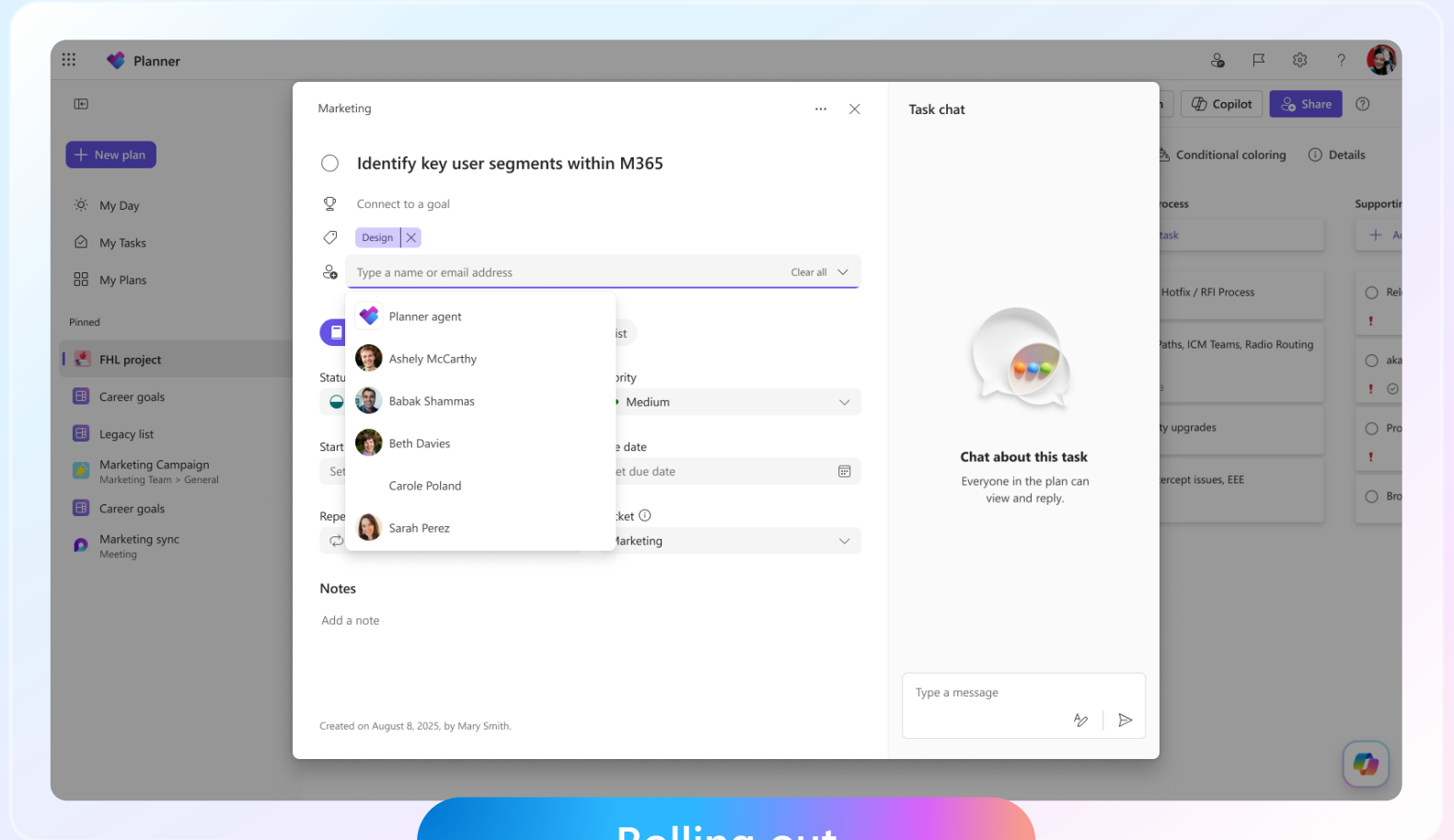
Rolling out: Planner Agent in unified plans

Planner Agent in unified plans

Assign Tasks to Planner Agent

Run status reports

Customize status report sections



Rolling out

*Access to Planner Agent requires a Microsoft 365 Copilot license.

Coming soon: New Planner Agent chat in Planner

Copilot chat pane

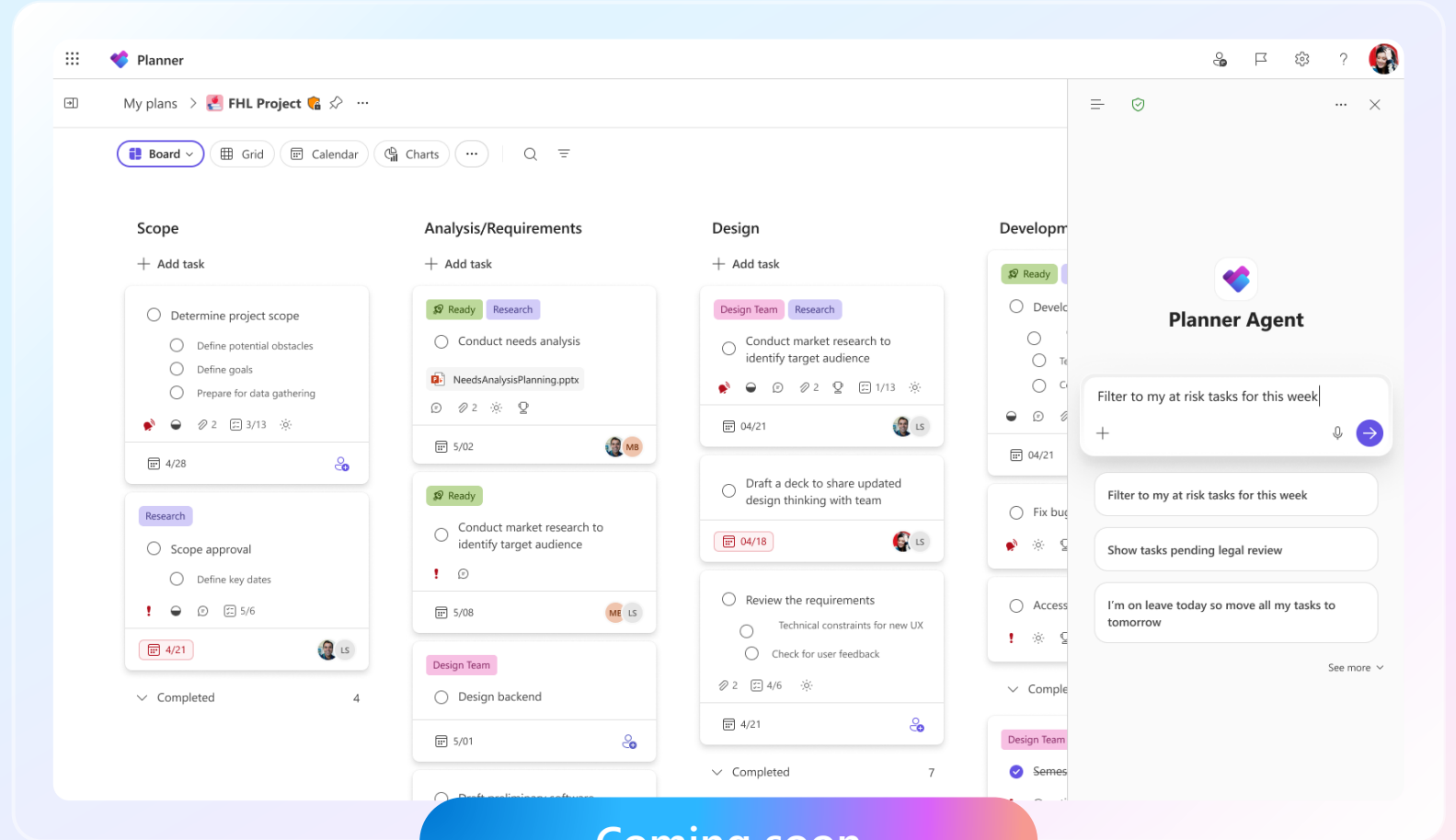
Work IQ in Planner

Smart task filters

Task prioritization

Task updates

Plan analysis



*Access to Planner Agent chat requires a Microsoft 365 Copilot license.

Coming soon

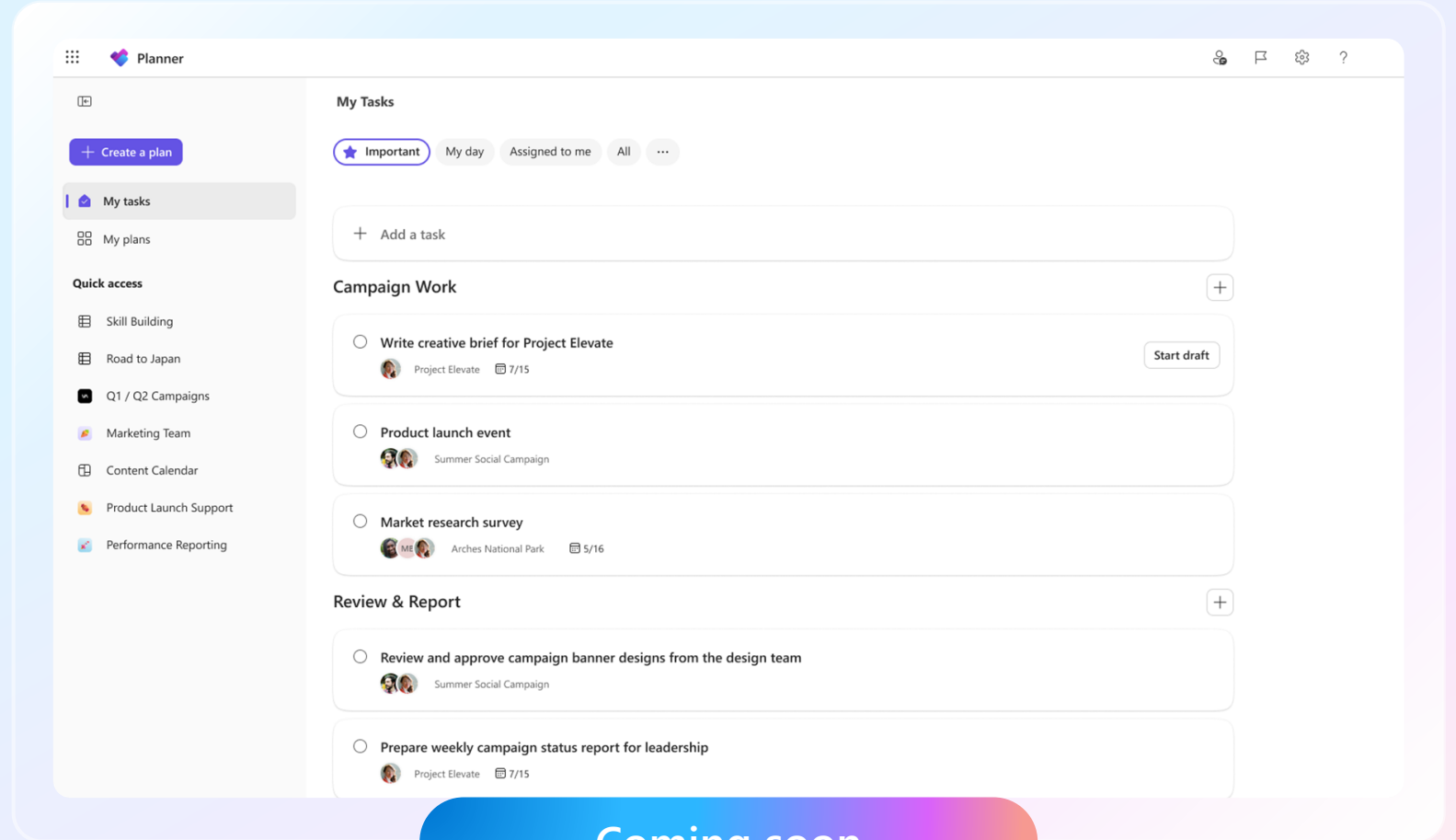
Coming soon: Improved My Tasks view

Simple To Do like experience

Starred tasks

Personal groupings

Quick prioritization



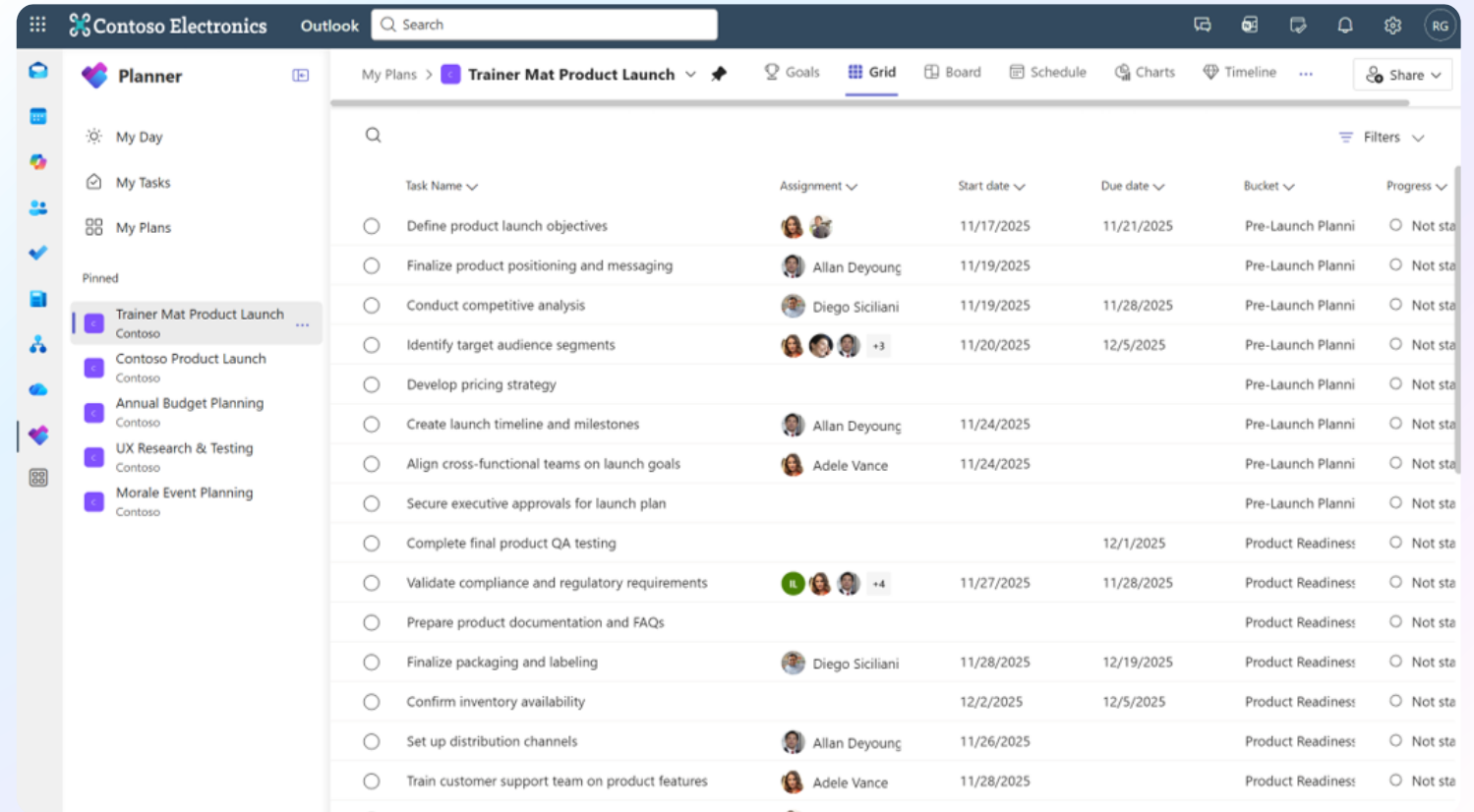
Coming soon

Rolling Out: Planner in Outlook

Complete Planner experience in Outlook

Download from the App store

Includes Planner Agent



Rolling Out

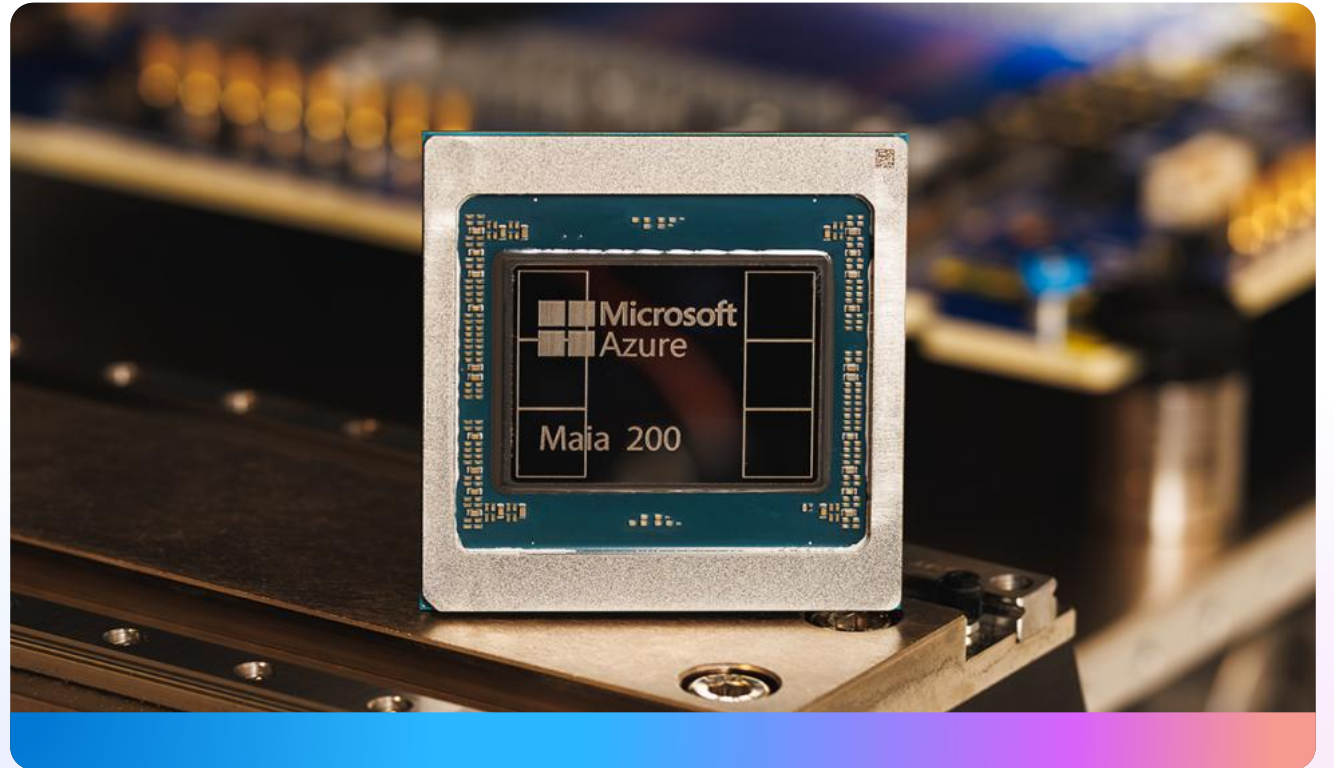
How Microsoft uses Planner

MAIA 200

Entire program spanning:

- Silicon
- Software
- Datacenters

Managed in Planner alongside integrations with Azure DevOps and other tools



Microsoft's in-house inferencing accelerator

10 petaflops | Liquid cooled | 3nm process



Agentic customization


- Home
- Agents
- Flows
- Tools
- ...

What would you like to build?


- Agent
- Workflow

Start building by describing what your agent needs to do


Start building from scratch



Create workflow
Powerful automations speed up your processes with ease and security in mind




Create an agent
Flexible solutions that take action, share knowledge, and handle tasks



Create computer-using agent
Let agents accomplish even more across apps and websites

Recent agents

[See all agents](#)

Name	Type	Last modified	Last published	Owner	Protection status
 Agent 1	Agent	Adele Vance 9 ...	Never	Adele Vance	--

Coming soon:

Planner Model Context Protocol (MCP)

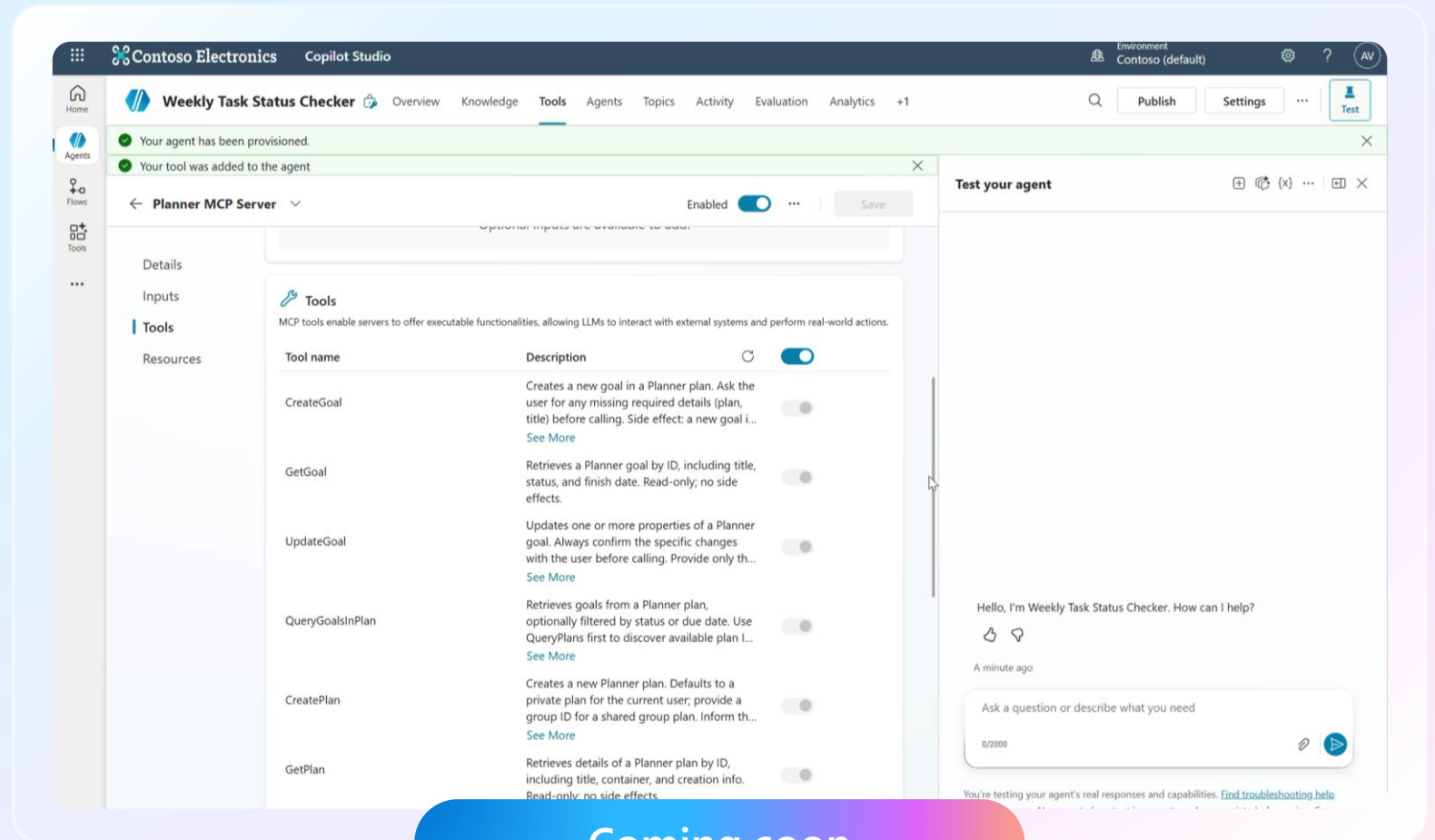
Tools for all operations

Structured Planner context

Agent read/write access

Secure, standard protocol

Scales across work



Coming soon

Coming soon:

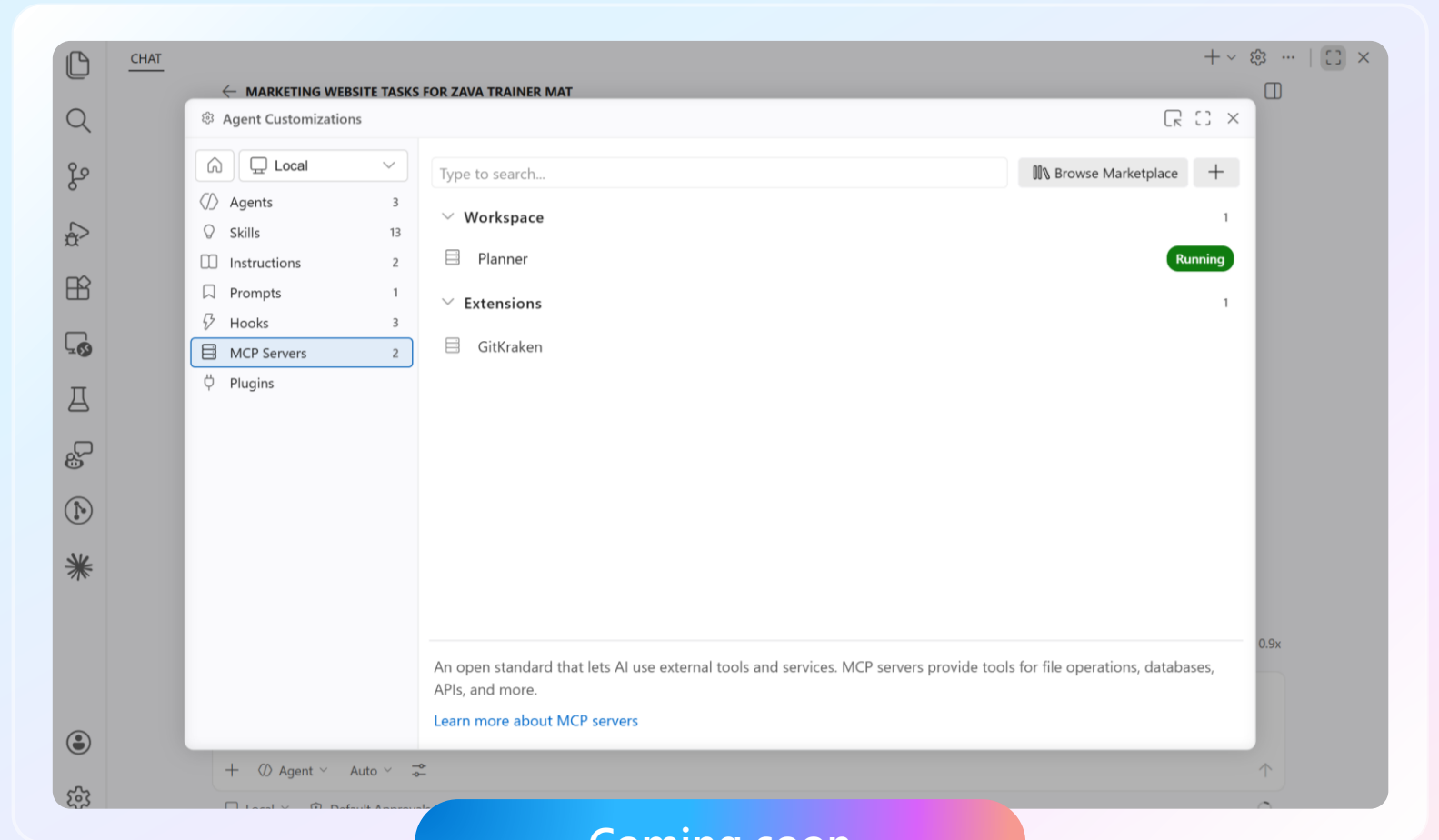
Planner MCP, GitHub Copilot, and Copilot Studio

Core CRUD tools for plans and tasks

Planner context for agents

Agentic planning and execution

Real work, end to end





Thank you!

We have an exciting future ahead.

Take your next step

Get started with Planner Agent:

aka.ms/PlannerAgentSupport

Get started with Planner Agent in Microsoft 365 Copilot:

aka.ms/PlannerAgentinCopilot

Access adoption resources, FAQs, and more:

aka.ms/PlannerUpdates

Access help, learning, and support articles:

aka.ms/PlannerSupport

See what's coming soon to Planner:

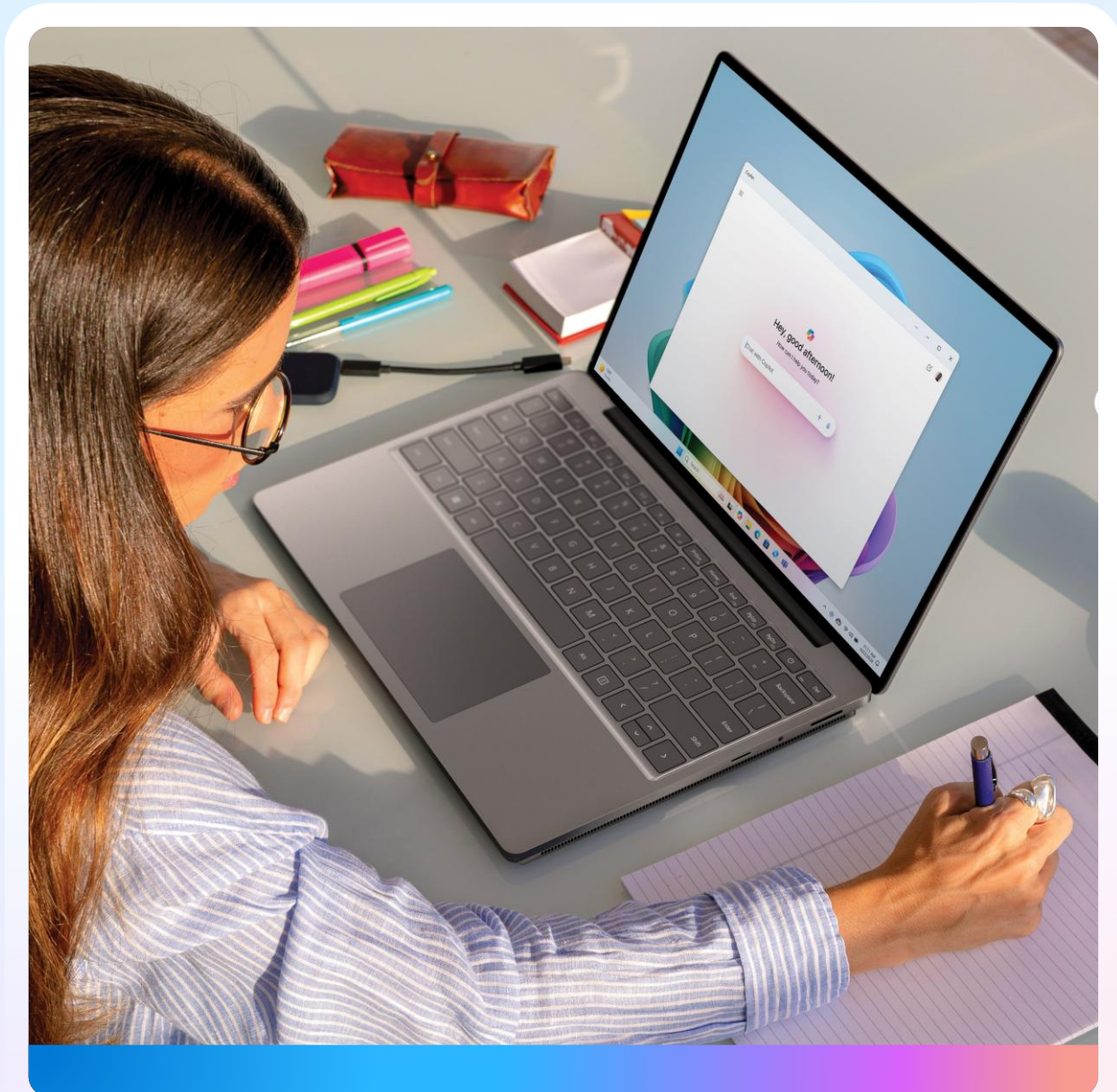
aka.ms/PlannerRoadmap

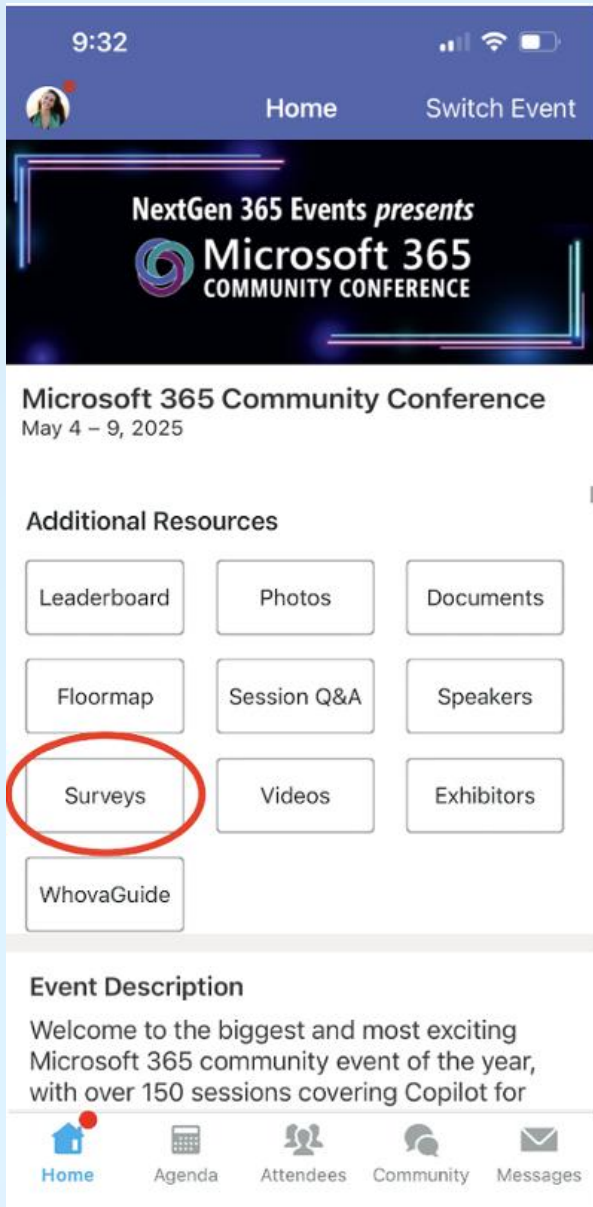
Stay up to date on the latest feature releases:

aka.ms/PlannerTechCommunityBlog

Let us know how we can improve the user experience:

aka.ms/PlannerFeedback





Session feedback surveys

We want to hear from YOU!

Share your feedback to make next years conference even better!

Here's how –

- Simply go to the Whova App on your smartphone.
- Scroll down on the Microsoft 365 Community Conference Homepage to 'Additional Resources' to click "Surveys".
- Click Session Feedback.
- Scroll down to find this session title.
- Complete the session feedback survey.
- Finally, click 'Submit'.

It's just that easy!

Thank you!