



**Microsoft 365**  
COMMUNITY CONFERENCE

# Shaping AI-Powered Work Management

Derick Deller, Wendy Haddad, and George Bullock

April 22, 2026

© Copyright Microsoft Corporation. All rights reserved.



# Uhova

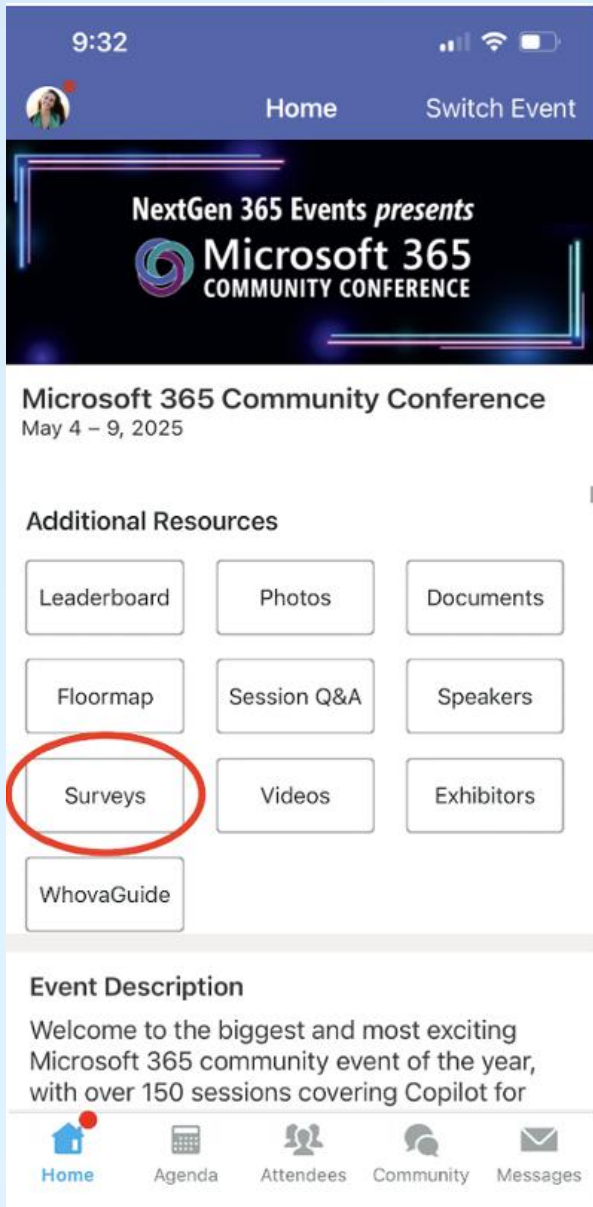


The official event app for the  
**Microsoft 365 Community Conference**

**Event invitation code: Orlando2026**

**Join the event app to access:**

- ➔ Event announcements
- ➔ Personalized agenda, session details
- ➔ Speaker & attendee profiles
- ➔ Networking, meet-ups, messages
- ➔ Event documents



# 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 M365 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!

# Ways to Participate

Thank you so much for joining us today! There are two ways to participate in this session:

- **Live in the room** – Share your thoughts and feedback during today's live discussion.
- **Via Forms** – Scan the QR code or use the aka link provided to the right to access the form.

Using both channels ensures your feedback is heard. Note that we'll need to move quickly to cover these topics in depth, so we may ask you to add additional context to the form as we go.

**To get started:** Please complete the initial form page to let us know who you are, then *wait to fill out the next page until instructed to do so.*



Scan the QR code or visit  
**[aka.ms/Planner-Roundtable](https://aka.ms/Planner-Roundtable)**



## Derick Deller

Principal Group Product  
Manager, Microsoft Planner

[/derickdeller](#)



## Wendy Haddad

Senior Customer Experience  
Program Manager, Microsoft  
Planner

[/wendyhaddad](#)



## George Bullock

Senior Product Marketing  
Manager, Microsoft Planner

[/georgebullock](#)

# Other Microsoft Planner Sessions

## LIGHTNING TALK

**Planner, Agents, and AI: Tips and Tricks  
for Modern Task Management**

**Wednesday, April 22  
@ 4:15 PM**

**Expo Hall – Microsoft  
Lightning Talk Theater**

## BREAKOUT SESSION

**Planner, Copilot, and Agents: AI Assisted  
Projects with Work IQ**

**Thursday, April 23  
@ 9:00 AM**

**Oceana Grand 2**

# Session intent and guidelines

## WHAT WE ASK

**Be candid and specific**

**Explore openly**

**Stay focused**

**Participate in the room and in the form**

## WHAT YOU'LL GET

**A voice in shaping the product**

**Early insight into what's ahead**

# Current Planner Agent experiences



## Features available in Planner (GA)

Plan generation

Task execution

Plan status reports

Planner agent chat



## Features available in Microsoft Teams (GA)

Facilitator Agent

- Document creation
- Proactive task creation
- Reactive task creation

Channel Agent

- Workback plan generation



## Features available in Microsoft 365 Copilot Chat (Frontier)

My tasks

- Creation, update, deletion
- Q&A

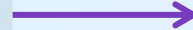
Workback plan creation

- Creation, update, deletion
- Q&A

# Microsoft Planner in the agentic era



**Project Manager Agent**



**Planner Agent**

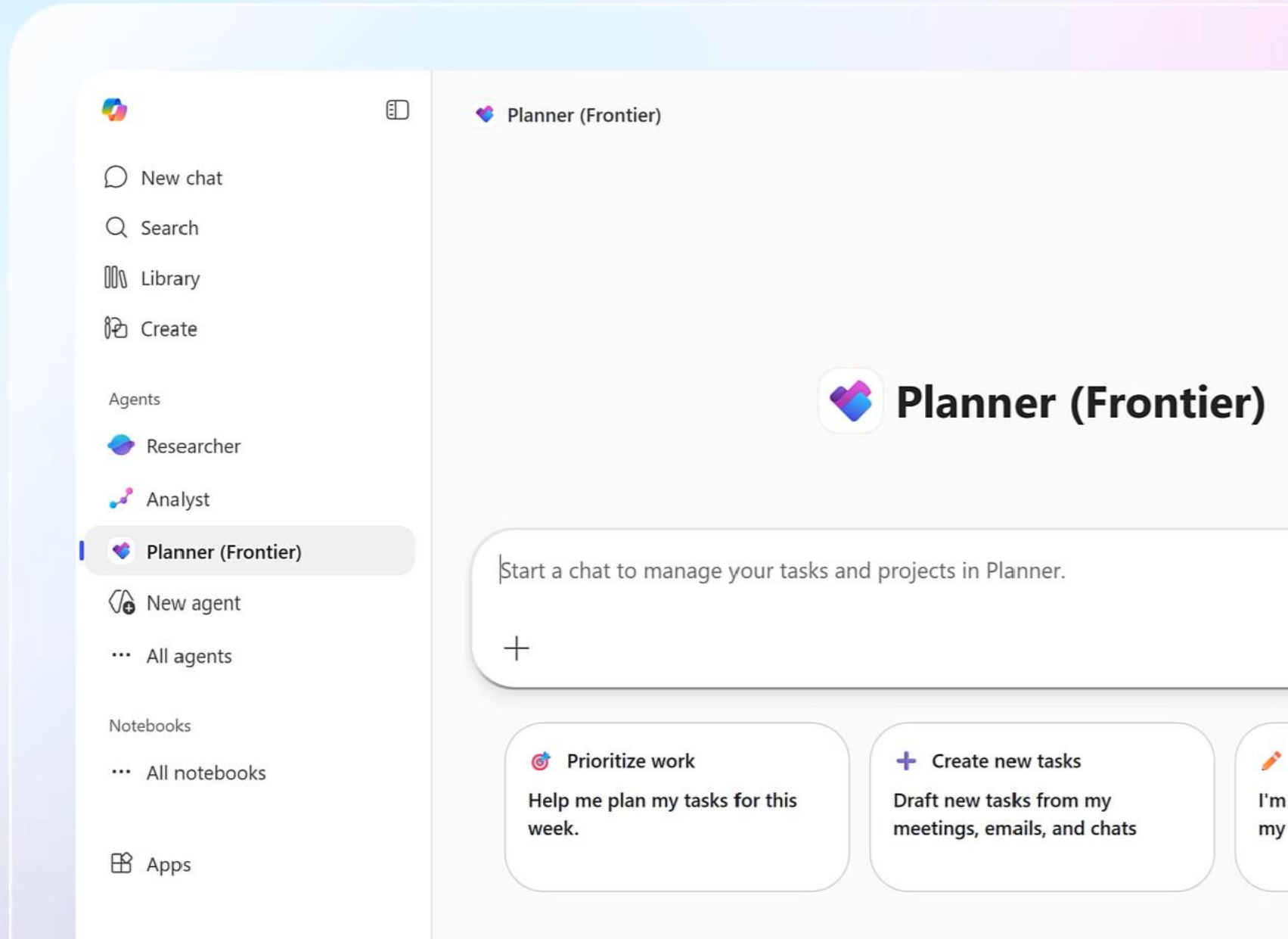
(also available in Microsoft 365  
Copilot Chat through Frontier)

**We have an  
exciting future ahead.**

---

# Planner Agent in Microsoft 365 Copilot Chat

# Planner Agent in Microsoft 365 Copilot





Work

Web

Auto



New chat

Search

Library

Create

Agents

Researcher

Analyst

Employee Self-Service

Files (Dev)

New agent

All agents



Apps



# Welcome, how can I help?

Message Copilot



Reword

Explain

Proofread

Trending





[+ Create agent](#) ...

New chat

Search

Library

Create

Agents

Researcher

Analyst

Employee Self-Service

Files (Dev)

New agent

**... All agents**

Apps



# Agent Store

## Your agents

Agent activity [Preview](#)

Researcher

Analyst

Employee Self-Service

Files (Dev)

PowerPoint

Excel

Files

Idea Coach

[See more](#) ▾

## Built by Microsoft



**App Builder (Frontier)**  
Transform your idea into an app.  
No coding required.



**Workflows (Frontier)**  
Build agent flows with natural  
language, no code needed.



**Learning (Frontier)**  
Upskill in AI and other areas with  
personalized learning...



**Planner (Frontier)**  
Manage team projects and  
everyday tasks in Planner—right...



**Workforce Insights (Fro...)**  
Real-time insights into your  
organization's people, structure,...



**SharePoint list agent**  
Transform Microsoft 365 Copilot  
chat context into SharePoint lists.

New chat  
Search  
Library  
Create

Agents

- Researcher
- Analyst
- Employee Self-Service
- Files (Dev)
- New agent
- All agents**

Apps

Create agent

**Planner (Frontier)**  
Microsoft Corporation

Add

Works across

**Manage team projects and everyday tasks in Planner—right from your chat.**

Whether you're leading a big-picture project or contributing to one, the Planner (Frontier) agent for Microsoft 365 Copilot provides intelligent insights, prioritization, and automation. With secure access to your team's shared work, this agent can help you stay focused on what matters.

- **Track and manage all your tasks in one place**  
Capture action items from Microsoft Teams meetings and Outlook emails and turn them into tasks in Planner. Then track and update them easily right from the chat.
- **Stay in control of projects from start to finish**  
Update project plans and task lists instantly. Get quick insights about your plan's progress and risks. Currently available for basic plans only.
- **Prioritize and get your work done**  
See top tasks and upcoming deadlines at a glance, and delegate research, writing, analysis, and more to the agent.

**Frontier**  
The new Frontier program gives customers early, hands-on access to experimental Microsoft 365 Copilot innovations right in their own environment. The agents and AI features designated as "Frontier" are previews, built for evaluation and feedback purposes. As these features are still in development, their availability and capabilities may change at any time. Learn more about how you can help shape the next generation of Microsoft 365 Copilot.

**App features**

By using Planner (Frontier), you agree to the [privacy policy](#), [terms of use](#), and [permissions](#).

Agent activity Preview

- Files (Dev)
- Idea Coach

See more

**Learning (Frontier)**  
Upskill in AI and other areas with personalized learning...

**SharePoint list agent**  
Transform Microsoft 365 Copilot chat context into SharePoint lists.



Planner (Frontier)



New chat

Search

Library

Create

Agents

Researcher

Analyst

**Planner (Frontier)**

Employee Self-Service

New agent

All agents

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

# **Q1 – When engaging with the Planner Agent in M365 Copilot Chat, what do you ask?**

## **CONSIDER**

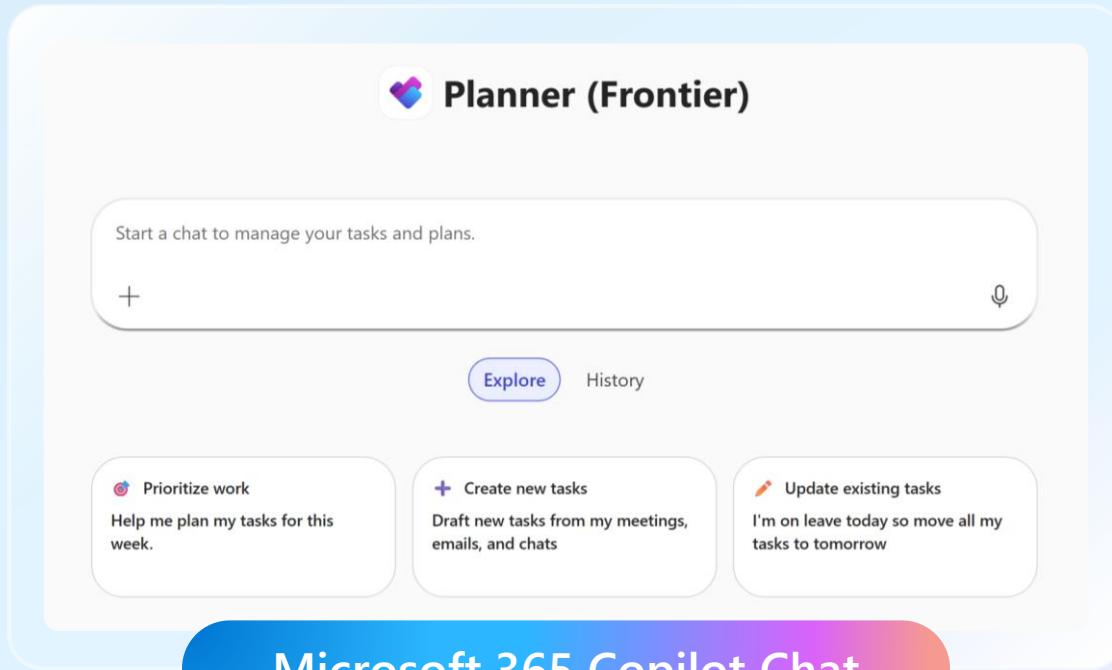
**What should the Planner Agent be able to tell you?**

**What information and tools should the Planner Agent be able to access?**

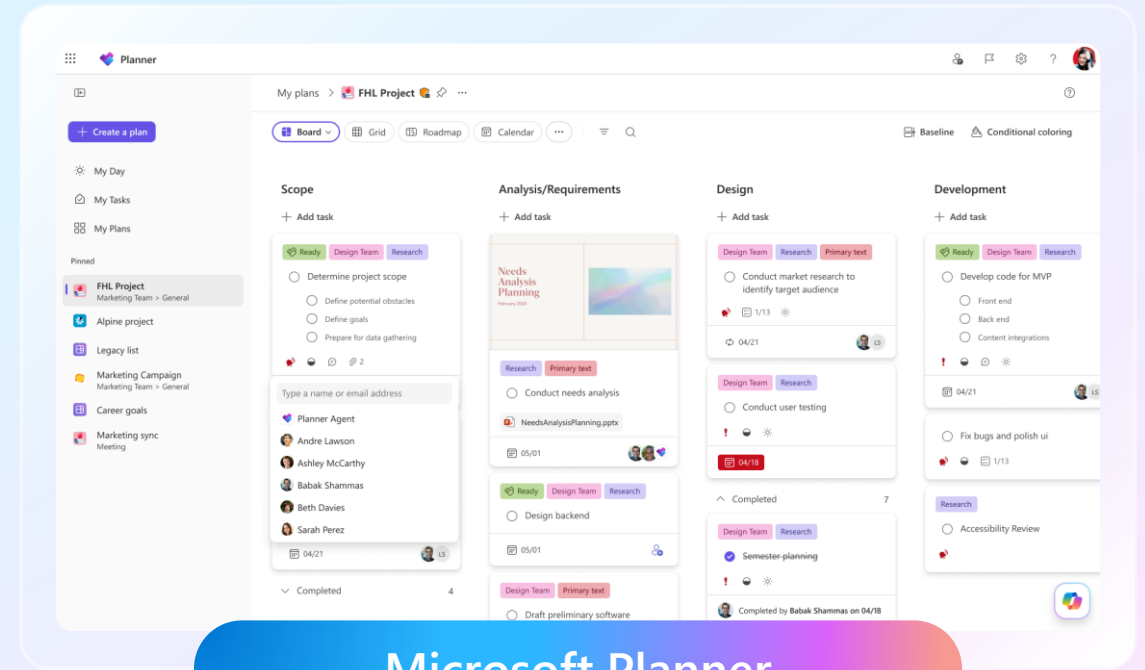
Please answer live and in the form



# Two ways to use the Planner Agent



Microsoft 365 Copilot Chat



Microsoft Planner

# **Q2 – When do you want to interact with the Planner Agent in chat vs. Planner?**

## **CONSIDER**

**What kinds of tasks feel better suited to a chat experience?**

**When would you want to see the full visual plan?**

Please answer live and in the form



# Planner Agent in Microsoft 365 Copilot Chat

## Collecting task information

Gather task details from multiple sources such as Planner, email, Teams, files, meetings, and more.

## Asking questions about your work

Interactively inquire about tasks, deadlines, or project details within the chat.

## Updating tasks from chat

Modify or update task details directly within the chat interface.

## Converting follow-ups into tasks

Transform follow-up items from conversations or communications into actionable tasks.

## Reviewing assigned tasks

Check and manage tasks that have been assigned to you.

## Creating structured plans

Build detailed project plans from scratch using the tool.

# Q3 – How likely are you to use the Planner Agent in Microsoft 365 Copilot Chat?

RATE

1

Wouldn't use

2

Needs work

3

On the right track

4

Almost there

5

Hits the mark

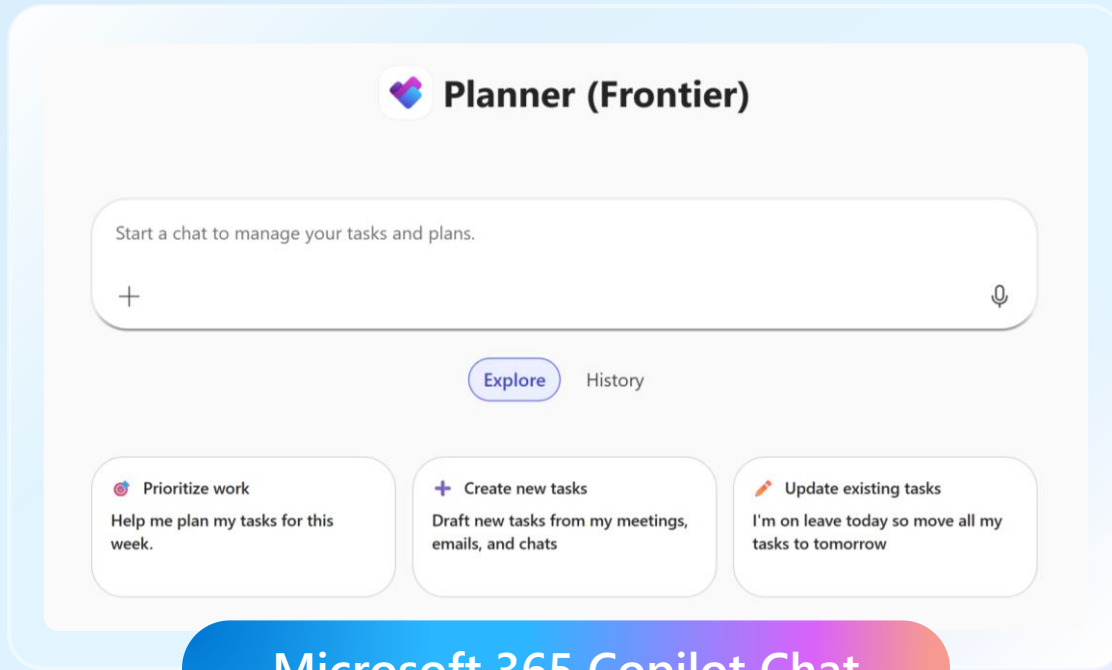
**Q4 – What's the one feature that would make it better?**

Please answer live and in the form

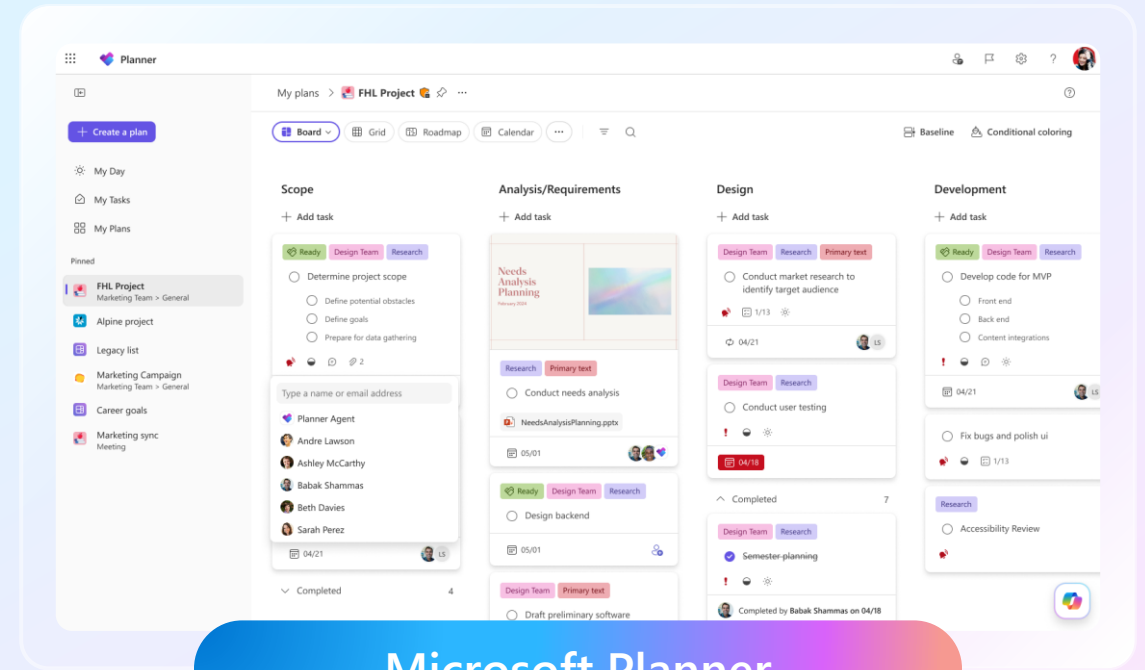


# Other top of minds

# Two ways to use the Planner Agent



Microsoft 365 Copilot Chat



Microsoft Planner

# **Q5 – When would you want a personal agent vs. a team agent?**

## **CONSIDER**

**What tasks would you want to assign to a private agent?**

**When would a shared agent that your team collaborates through work better?**

Please answer live and in the form



# Status reports

The screenshot displays the Microsoft Planner application interface. On the left, a navigation sidebar includes sections for Activity, Chat, Teams, Calendar, Pinned, and Apps. The main area shows the 'Planner' view for the 'FHL project'. A notification at the top states 'Report created on November 21st, 2024 at 10:53 AM.' with a 'Share as newsletter' button. Below this, a report card is visible with the title 'Workspace Strategy and Design Marketing Status Report'. The report includes the following details:

- Date:** November 21, 2024
- Reporting period:** October 21, 2024 - November 21, 2024
- Project owner:** Howard Crow (Marketing Manager)

The report also features a 'Project Summary' section with two paragraphs of text:

**Project Summary**

Van Arsdel is launching a new service, **Workspace Strategy and Design**, aimed at creating flexible and efficient work environments that adapt to the changing needs of businesses and their employees. The marketing campaign focuses on promoting this service to existing and potential clients, highlighting Van Arsdel's expertise in designing adaptable, technology-integrated, and sustainable workspaces.

The project encompasses developing campaign concepts, creating localized content, aligning internal teams, preparing CRM systems, and producing comprehensive marketing materials. The ultimate goal is to increase brand awareness, generate leads, and position Van Arsdel as a leader in workspace design solutions. The campaign began on June 3, 2024 with the scheduled launch date on January 15, 2025.

# **Q6 – How do you provide status updates on your work today?**

## **CONSIDER**

**What cadence do you need to provide updates?**

**Where/how do you provide updates?**

Please answer live and in the form



# **Q7 – What do you need to include in a status update?**

## **CONSIDER**

**What information do you  
look for vs. ignore?**

**What makes a status  
update trustworthy?**

Please answer live and in the form



**Thank you!**

# Expertise and tools for your journey



Technical expertise via  
our FastTrack partners

[aka.ms/Microsoft/FastTrack](https://aka.ms/Microsoft/FastTrack)



Tools, resources & training  
on our Adoption Hub

[adoption.microsoft.com](https://adoption.microsoft.com)



Events and real-world  
knowledge in our  
community

[aka.ms/TechCommunity](https://aka.ms/TechCommunity)

# News and community content



## Microsoft Community Learning [aka.ms/Community/LearningChannel](https://aka.ms/Community/LearningChannel)

Community led expert content on all your favorite Microsoft services.



Start your week with news and event updates  
[aka.ms/MondaysatMicrosoft](https://aka.ms/MondaysatMicrosoft).  
Watch live or on-demand and share our blog.

Home / Microsoft 365 Copilot

### Microsoft 365 Copilot

Deliver value and employee satisfaction with our tools for Microsoft 365 Copilot deployment and adoption. This powerful technology combines the power of large language models (LLMs) with your organization's data – all in the flow of work – to turn your words into one of the most powerful productivity tools on the planet.

Microsoft 365 Copilot Chat and in-app experiences provide real-time intelligent assistance, enabling users to enhance their creativity, productivity, and skills.

[Looking for Copilot resources for Small and Medium Businesses? >](#)

**Copilot Success Kit**  
Our Success Kit empowers you to achieve rapid value with Copilot while enabling your progressive skilling journey with AI tools.  
[Download here >](#)

**Copilot Chat and agent starter kit**  
This new kit includes guidance on IT controls, setup, and resources to help prepare your tenant and enable your users to create and use agents.  
[Explore the kit >](#)

**Join the Copilot community**  
The Microsoft 365 Copilot community is your hub for the official blog, latest news, and discussions.  
[Join now >](#)

### Microsoft 365 Copilot

Welcome to the Microsoft 365 Copilot community. Your hub for the latest news, live events, and discussions on Microsoft 365 Copilot. For help & learning (how-to articles and training resources), please visit [Microsoft 365 Copilot Adoption hub](#).

Search this community

[Unfollow](#)

#M365Con

**Microsoft 365 COMMUNITY CONFERENCE** May 6-8 Las Vegas Microsoft

**Your front-row seat to the future of work**

**The ultimate Microsoft 365 community event**  
Learn directly from the experts and redefine what's possible at work—join us at the Microsoft 365 Community Conference.  
[Learn more!](#)

# Stay connected!

Engage with the best community in tech...

There's something for everyone!



## Microsoft Tech Community

The community platform for Microsoft 365 forums, blogs, and events:

[aka.ms/joinMTC](https://aka.ms/joinMTC)



## CommunityDays.org

Find or host a local event in your area:

[www.communitydays.org](https://www.communitydays.org)



## Microsoft Community on LinkedIn

News, announcements and training delivered to your news feed:

[aka.ms/microsoftcommunitylinkedin](https://aka.ms/microsoftcommunitylinkedin)





# SharePoint at 25 short film: *More than Code*

In honor of SharePoint's 25th birthday, *More Than Code* is a short film that explores the people, passion, and innovation behind one of the most transformative platforms in modern work. This film captures the stories of builders, leaders, and community champions who helped shape SharePoint into the knowledge backbone for collaboration, Copilot, and the next generation of agents.

SharePoint is more than code—it's 25 years of connection, innovation and impact.



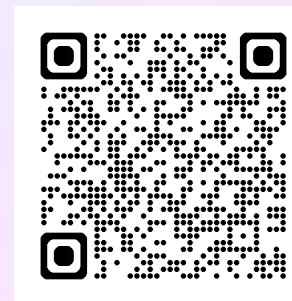
## Watch the digital premiere

Stream the documentary online globally in late April and celebrate SharePoint's 25-year journey from anywhere.



## Watch the SharePoint at 25 digital event

Prepare for the film with a special digital event featuring insights, stories, and what's next for SharePoint in the era of AI.



# Join MGCI – Learn, Share, Grow.

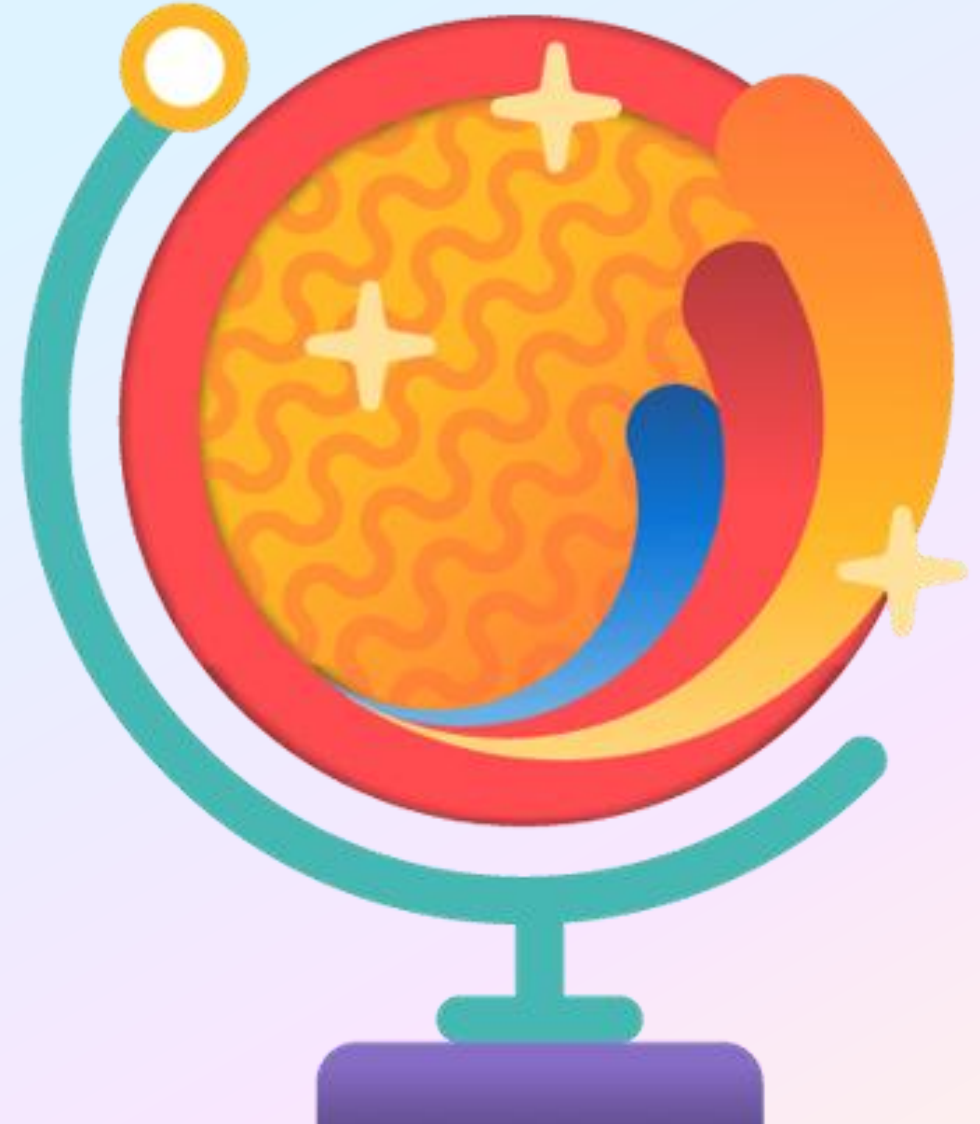
The Microsoft Global Community Initiative (MGCI) - Empowering global Microsoft communities with the tools, training, and resources to create impactful events and amplify diverse voices.

Learn, Share, Grow.

Event producers unite!

Join MGCI today!

<https://aka.ms/MGCI>



Thank you to our  
Microsoft Most Valuable  
Professionals (MVP)  
and Regional Directors!

