

Project Online migration checklist:

How to avoid losing critical portfolio capability

Most Project Online migrations fail quietly. The data moves. The new tools go live. And only months later do organisations realise that something important has been lost - confidence in reporting, clarity of ownership, or the ability to see the portfolio as a whole. This checklist is designed to help UK public sector organisations avoid that outcome.



Common pitfalls we see repeatedly



Underestimating reporting complexity

Losing historic baselines

Rebuilding governance manually

Fragmenting portfolio data

Over-customising Power Platform solutions

All are avoidable with early assessment.



A practical test of readiness



If you cannot clearly answer:

What will we lose?

What must be preserved?

How will success be measured in 12 months?

Pause before committing to any path.

STEP 1

Audit how Project Online is actually used

Not how it was designed to be used. How it is used today.

- Which reports are relied on by senior leadership?
- Which datasets are manually reconciled?
- Which processes would break if data was fragmented?

This step alone often changes the migration conversation.

STEP 2

Identify non-negotiables

Before discussing tools, be explicit about what must not be lost.

Capabilities:

- Enterprise portfolio visibility
- Resource capacity planning
- Governance and assurance workflows
- Audit trails and baselines

Data:

- Historic schedules
- Financial snapshots
- Benefits data
- Approval records

Reporting:

- Board and statutory reporting
- Investment and funding decisions
- Assurance and gateway reviews

If these are not preserved, the migration has failed regardless of technical success.



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A structured migration checklist can surface hidden risks before they become operational issues.

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STEP 3

Separate delivery needs from tool familiarity

Many organisations default to:

"We already use Microsoft, so this must be the answer."

Familiarity reduces training overhead, but it does not replace:

- Portfolio governance
- Assurance
- Enterprise reporting

This distinction is critical.

STEP 4

Understand migration options

There is no single correct approach.

Common patterns include:

- Lift-and-shift: Fast, but riskier
- Phased coexistence: Lower risk, more planning
- Hybrid models: Microsoft tools for delivery, enterprise PPM for oversight.

The right option depends on how critical Project Online is today.

STEP 5

Engage the PMO early (if you have one)

This cannot be overstated.

Tool changes implemented without PMO leadership:

- Undermine governance
- Create shadow reporting
- Erode trust in data

Successful migrations treat this as a portfolio change, not an IT upgrade.

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