Navigation the Future
Of Microsoft Project and Project Online

May 31, 2023 @ 12pm-1pm EST

Jim Patterson, OnePlan Solutions

Microsoft's modern work management vision:

Teams work the way they want.

Executives get the results they need.

Microsoft Project

Empowers companies to achieve better results by aligning investments with projects and resources, working with agility and flexibility, and collaborating globally—all using intuitive, consistent tools in the Microsoft cloud platform.

Bridging the work management gap

We all manage projects… …but we're not all trained to do so

We believe collaboration is critical… …but it's chaotic, always happening everywhere

We want to manage work our way… …but the legacy tools we use don't allow it

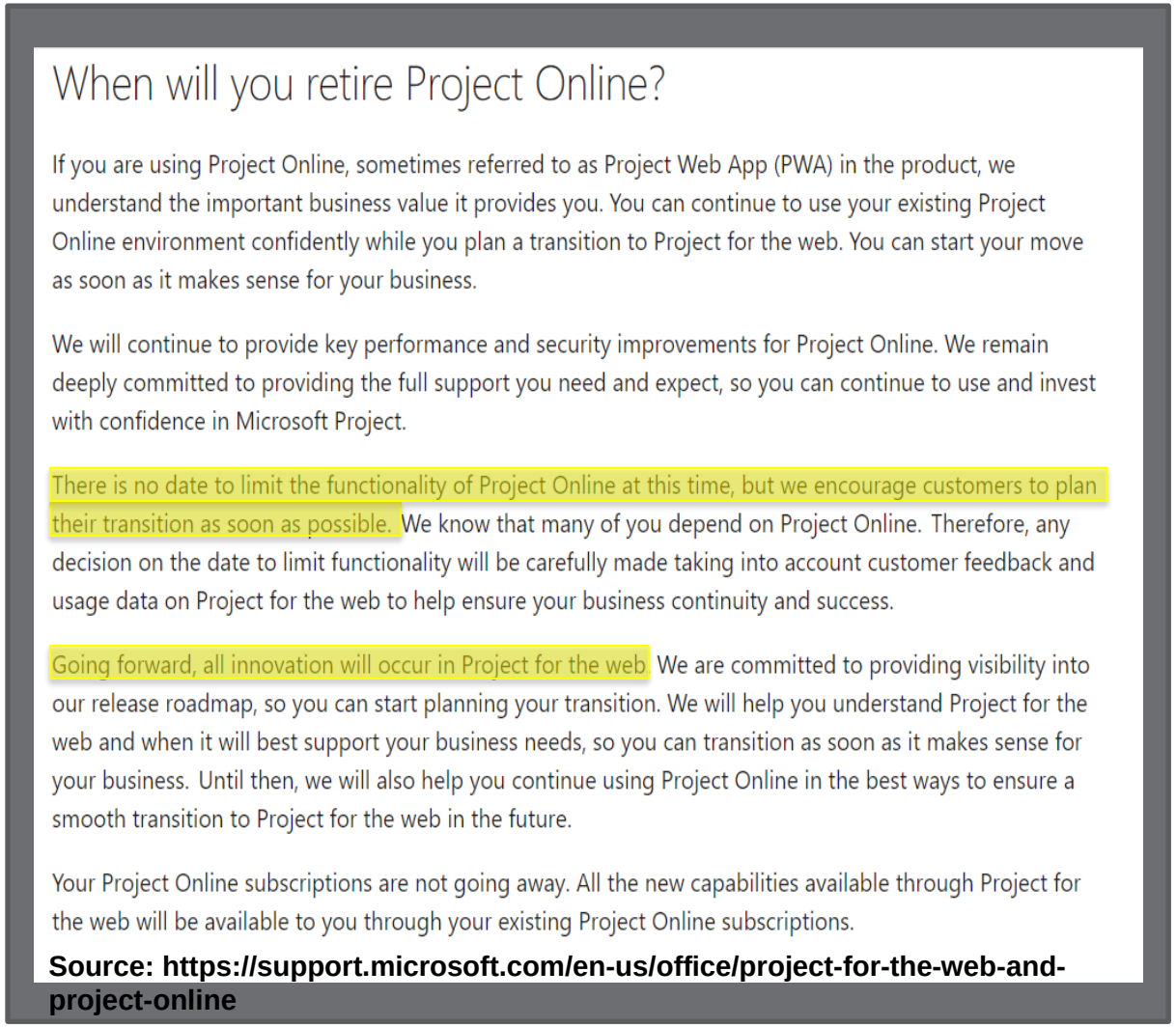
Because of this… Teams choose their own tools to succeed Leading to this…

We want to use our data effectively… …but it's a mess and our reporting is manual

We need to make better decisions… …but no one has the big picture

Microsoft's Future Vision

- Microsoft announced a plan to re-imagine Project and the end of investments in Project Online
- In the fall of 2019, they launched Project for the web
- Their vision going forward is to provide PPM capabilities leveraging the M365 platform.



When will you retire Project Online?

If you are using Project Online, sometimes referred to as Project Web App (PWA) in the product, we understand the important business value it provides you. You can continue to use your existing Project Online environment confidently while you plan a transition to Project for the web. You can start your move as soon as it makes sense for your business.

We will continue to provide key performance and security improvements for Project Online. We remain deeply committed to providing the full support you need and expect, so you can continue to use and invest with confidence in Microsoft Project.

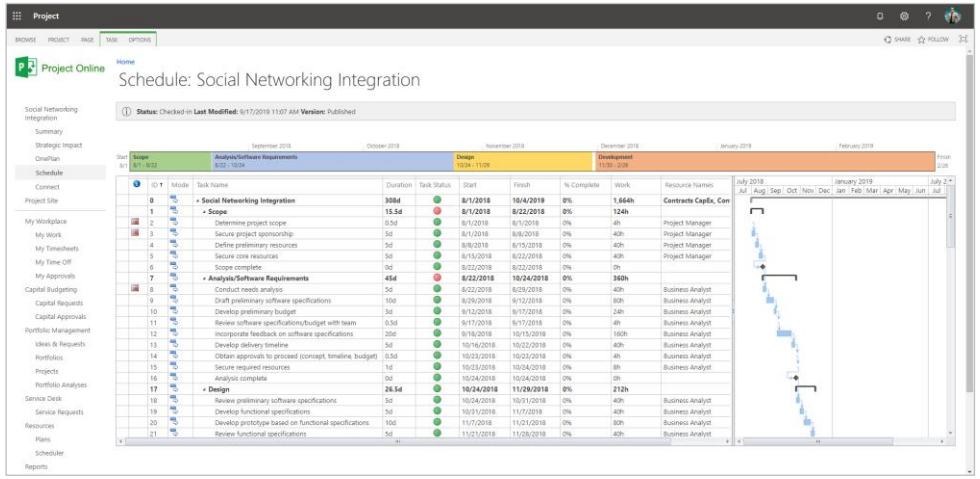
There is no date to limit the functionality of Project Online at this time, but we encourage customers to plan their transition as soon as possible. We know that many of you depend on Project Online. Therefore, any decision on the date to limit functionality will be carefully made taking into account customer feedback and usage data on Project for the web to help ensure your business continuity and success.

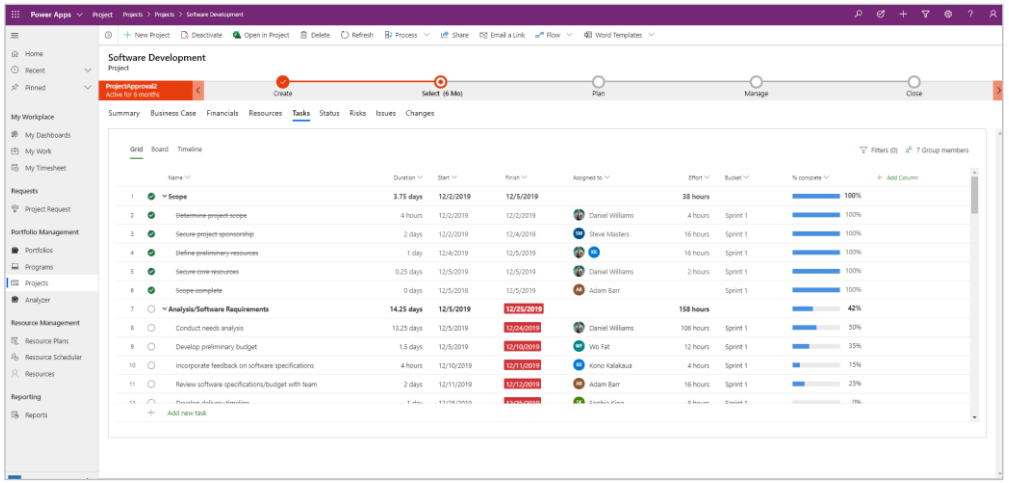
Going forward, all innovation will occur in Project for the web We are committed to providing visibility into our release roadmap, so you can start planning your transition. We will help you understand Project for the web and when it will best support your business needs, so you can transition as soon as it makes sense for your business. Until then, we will also help you continue using Project Online in the best ways to ensure a smooth transition to Project for the web in the future.

Your Project Online subscriptions are not going away. All the new capabilities available through Project for the web will be available to you through your existing Project Online subscriptions.

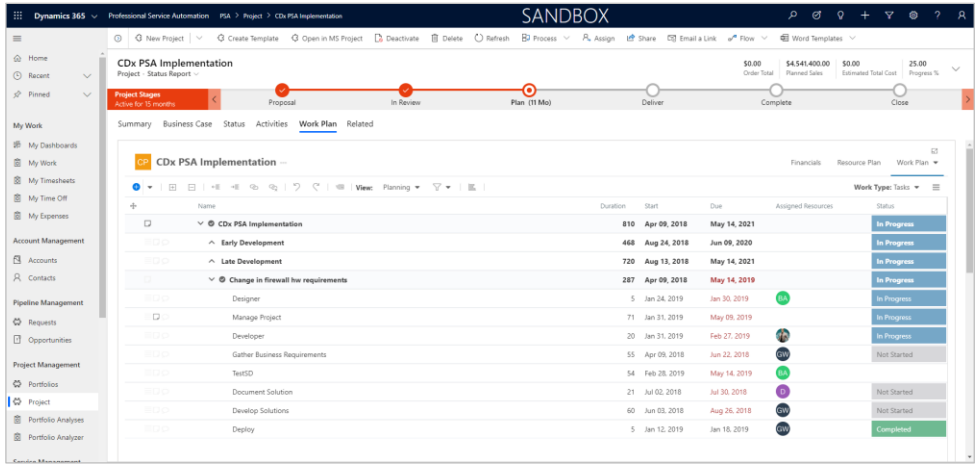
Source: https://support.microsoft.com/en-us/office/project-for-the-web-and-project-online

Microsoft Project Evolution





Project for the web and Power Apps

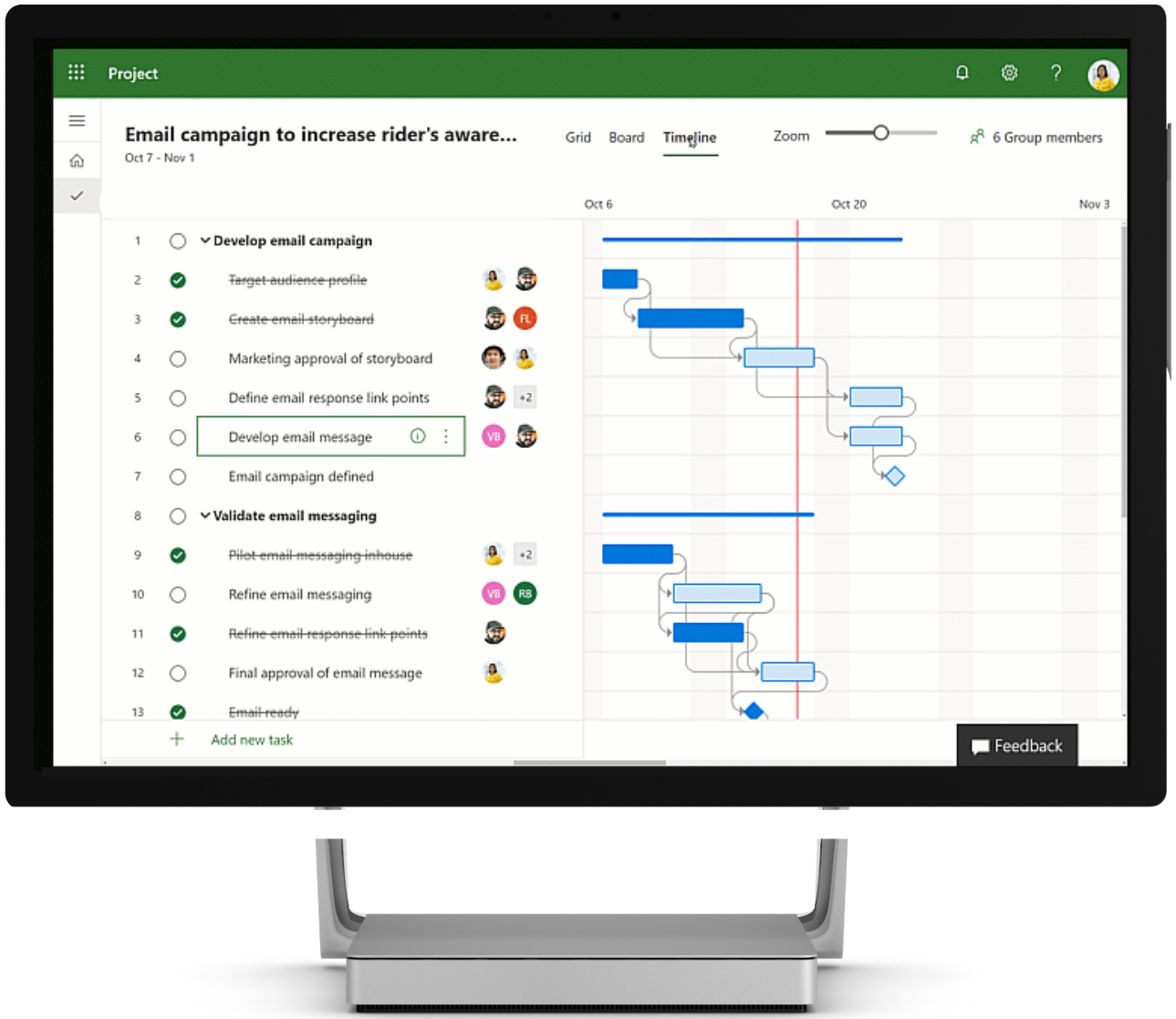


Project Online and SharePoint

Microsoft Project

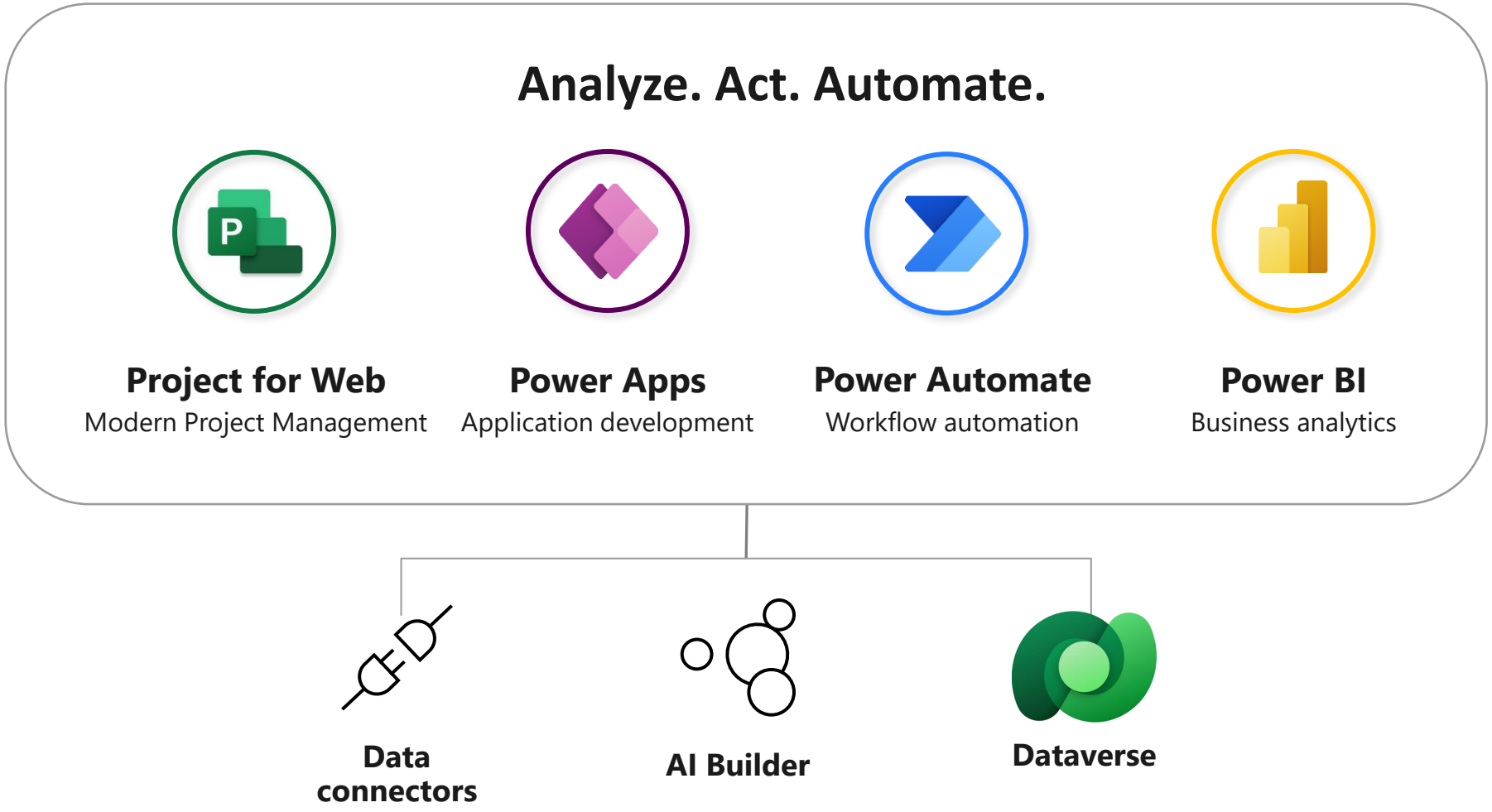
Simple & powerful project management for everyone

- Fresh new experience
- Collaboration made easy
- Intelligent planning
- Innovation platform



New Microsoft PPM built on the Power Platform

One low-code platform that spans Office 365, Dynamics 365, and standalone applications



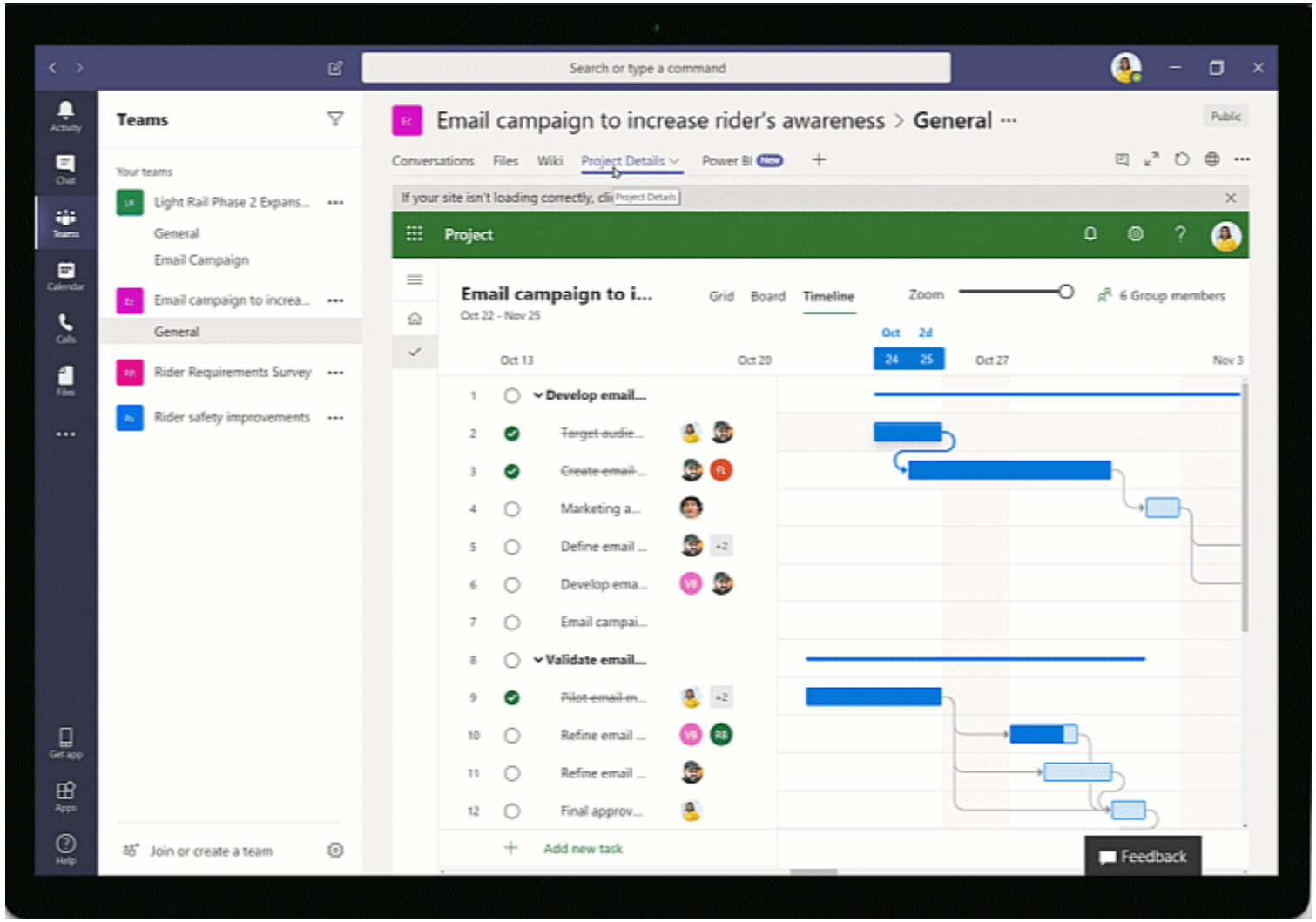
Power Platform is one of Microsoft's biggest bets

> Microsoft 365, Dynamics 365, and Power Platform, on top of what we're doing with Azure, is the **core of what we are doing as a company**.

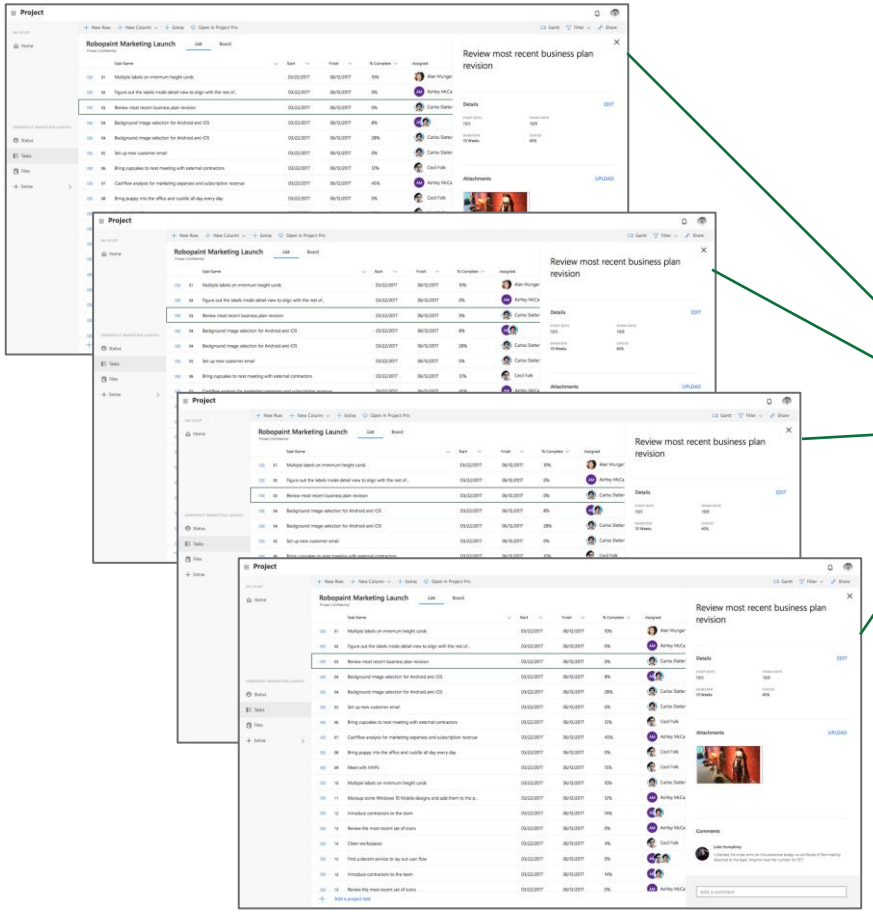
Satya Nadella
CEO, Microsoft

Uses Teams for Content and Collaboration

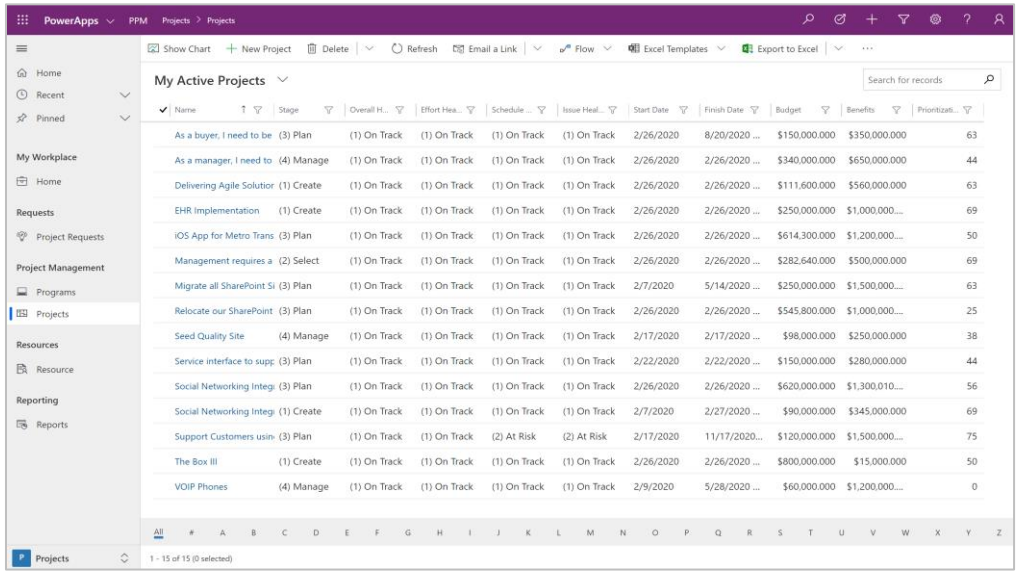
- Add to any team
- Posts
- Files
- Hub for tools/applications



All Projects in Dataverse – Power Apps Solutions



Dataverse

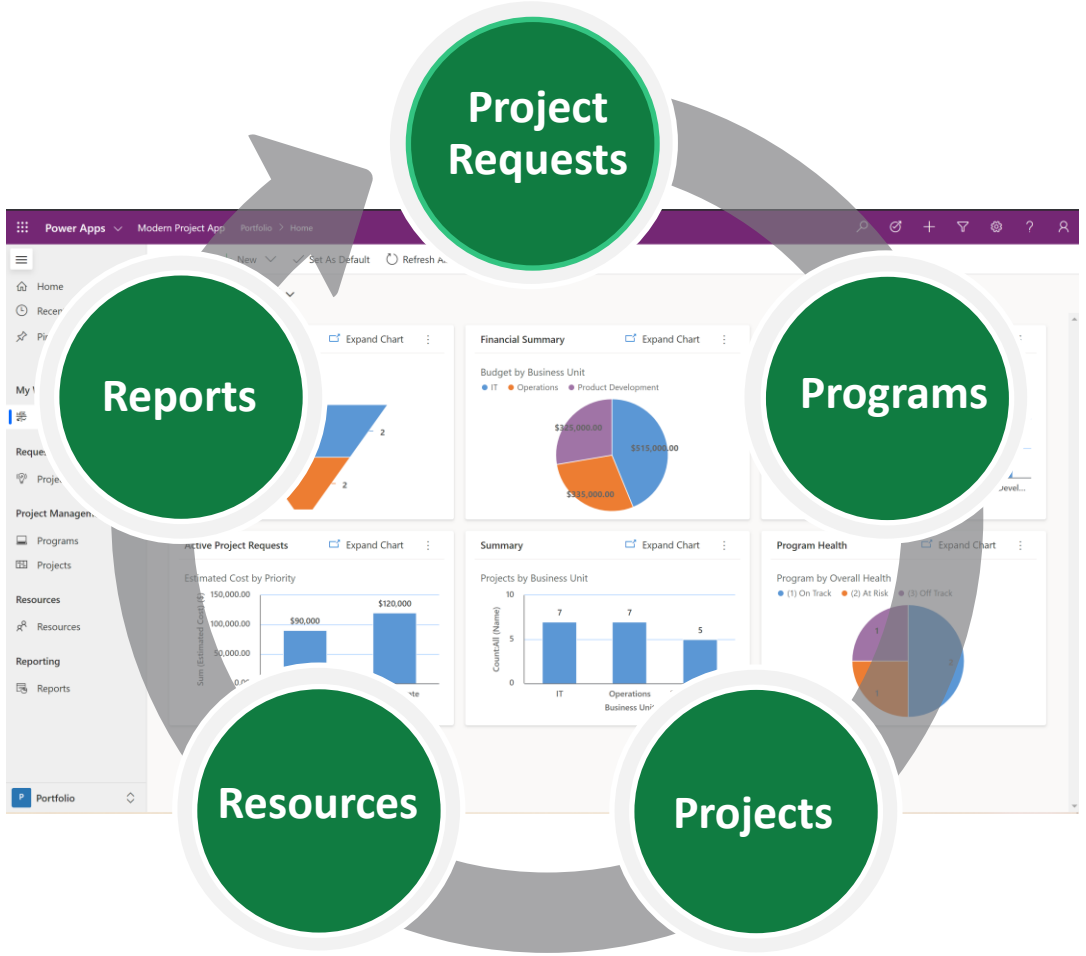


Modern Project for the web Accelerator Solution

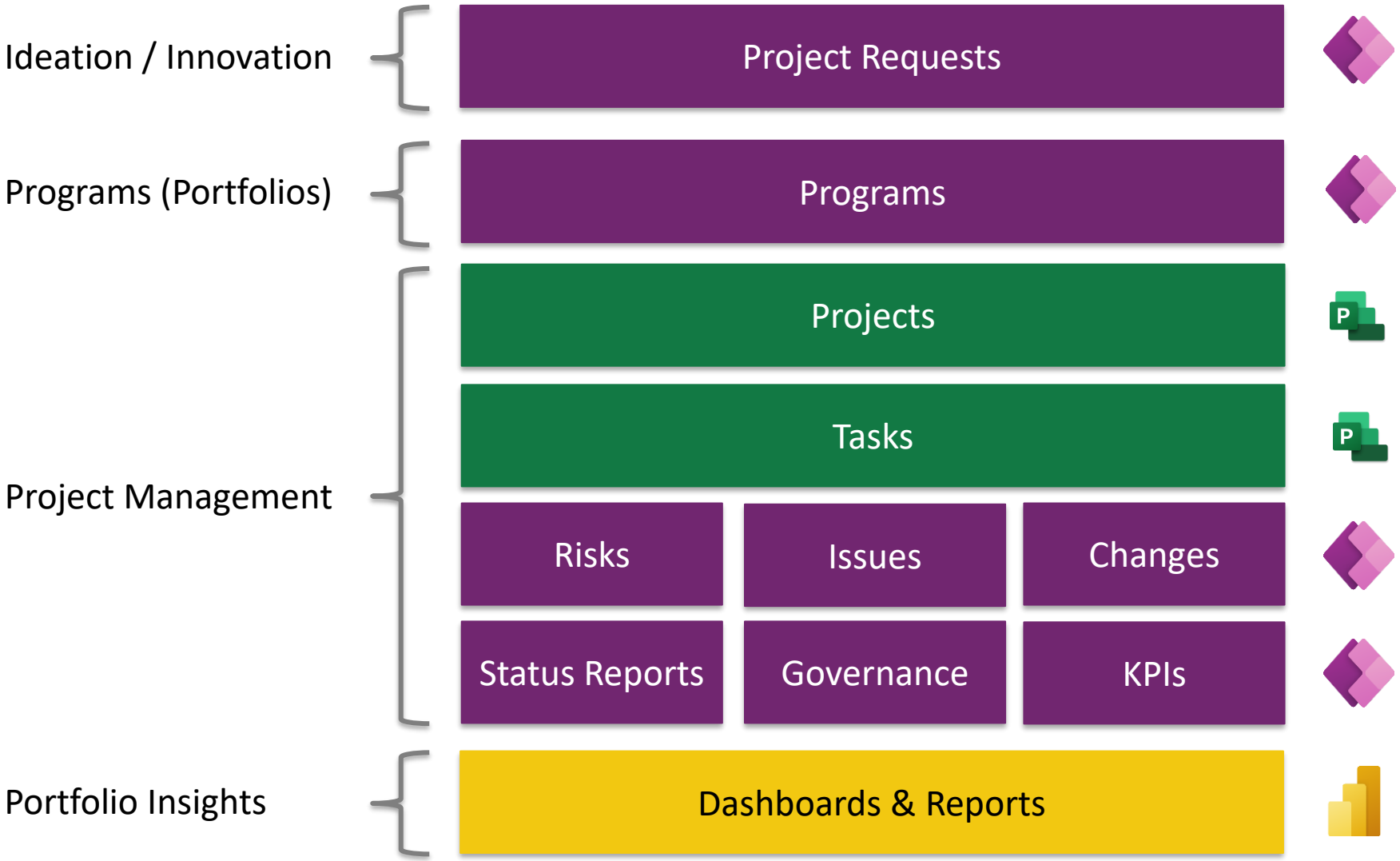
(aka Project Accelerator, PPM Accelerator, PMO Accelerator)

Developed for Microsoft by OnePlan

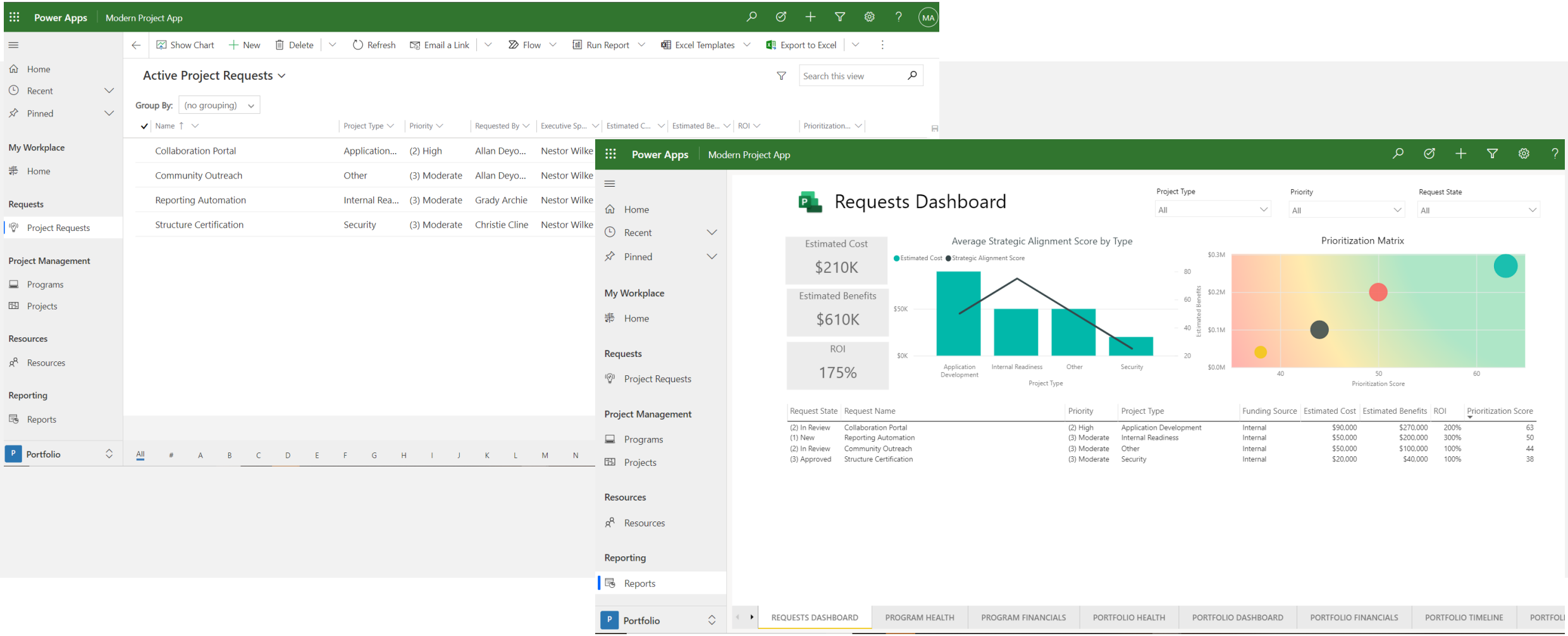
Demonstrates the use the Power Platform and with Project for the web for Project for Project and Program (Portfolio) Management requirements.



Project Accelerator Solution Components

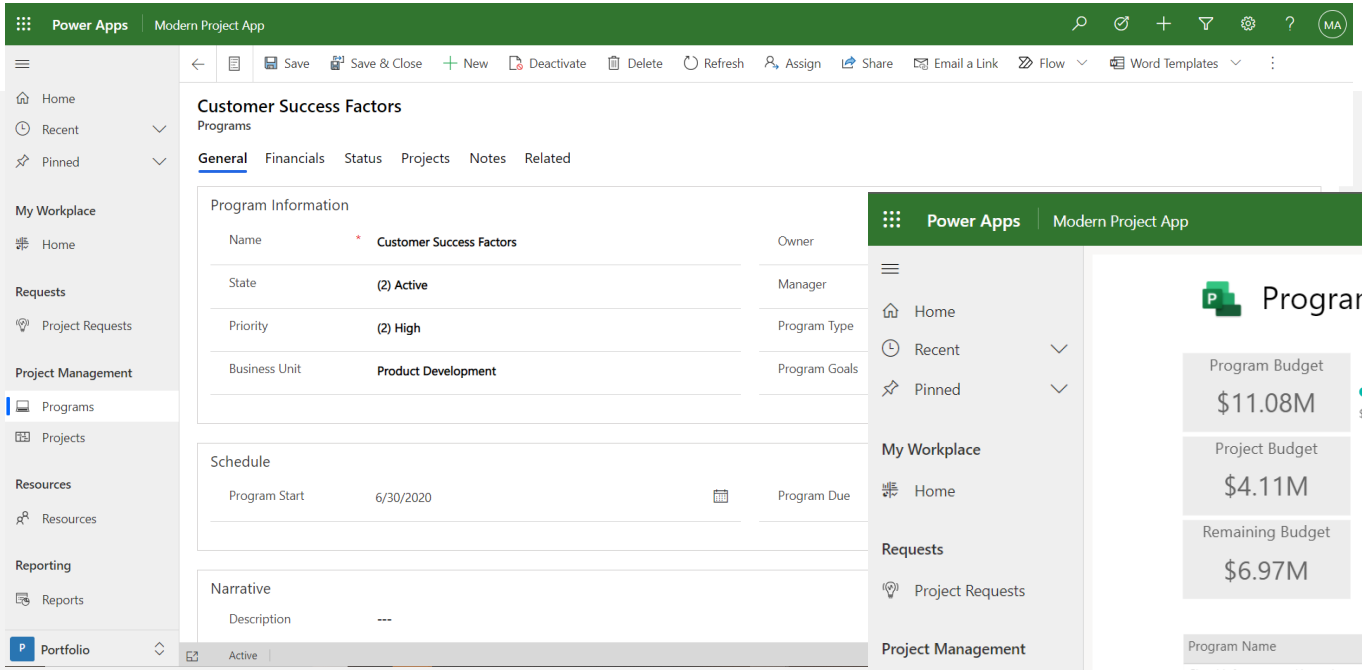


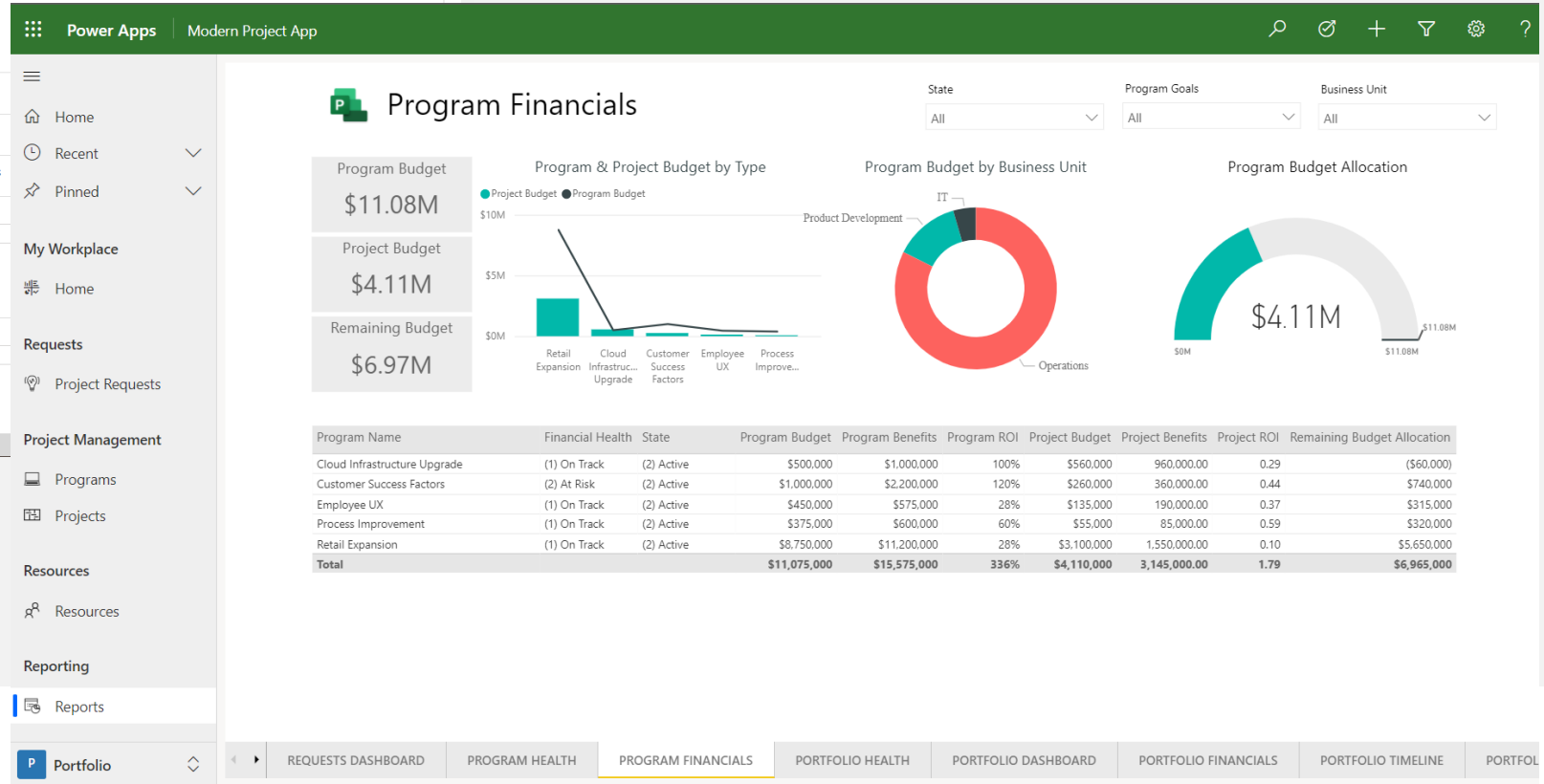
Demand Management



Ideation & Project Requests

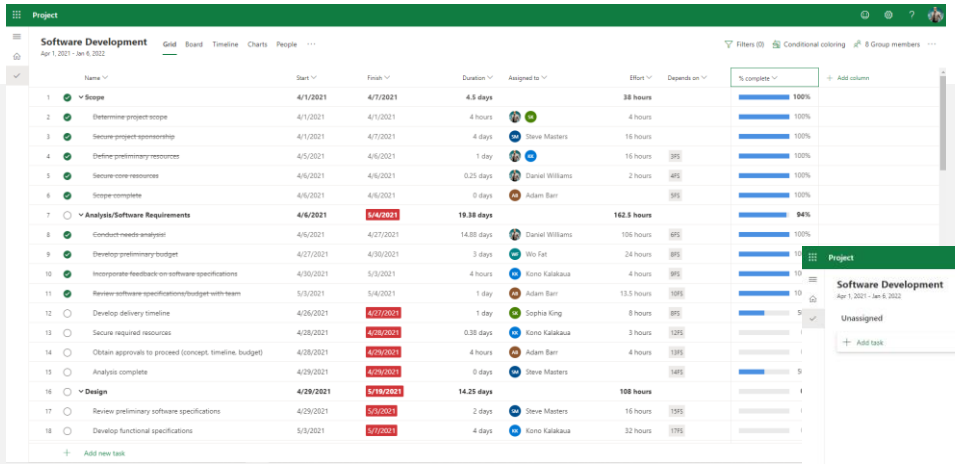
Program Management



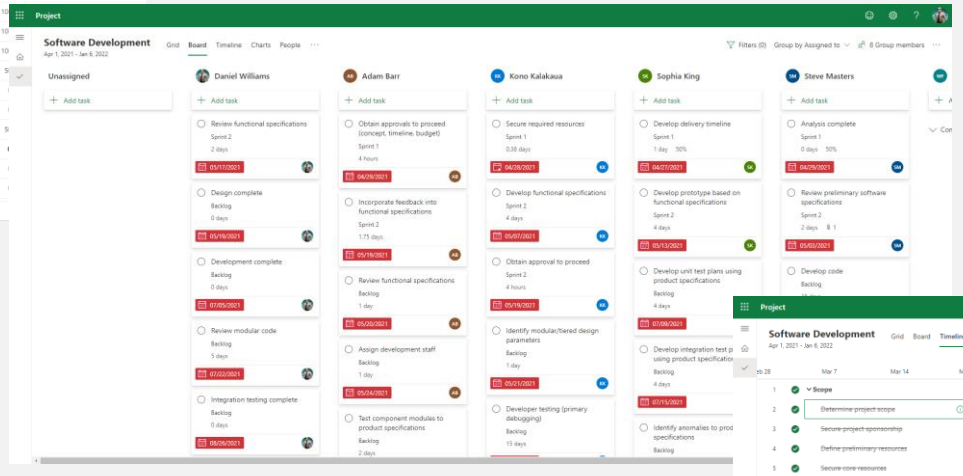


Program Management

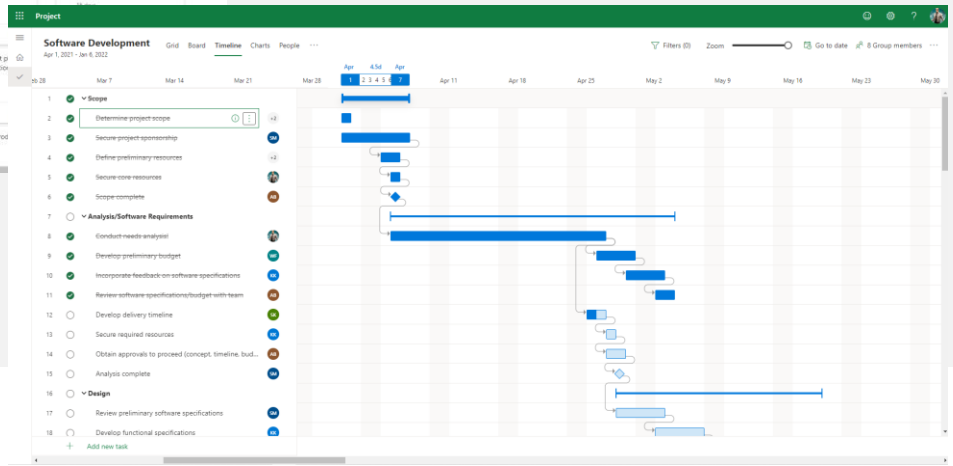
Project Management



Grid



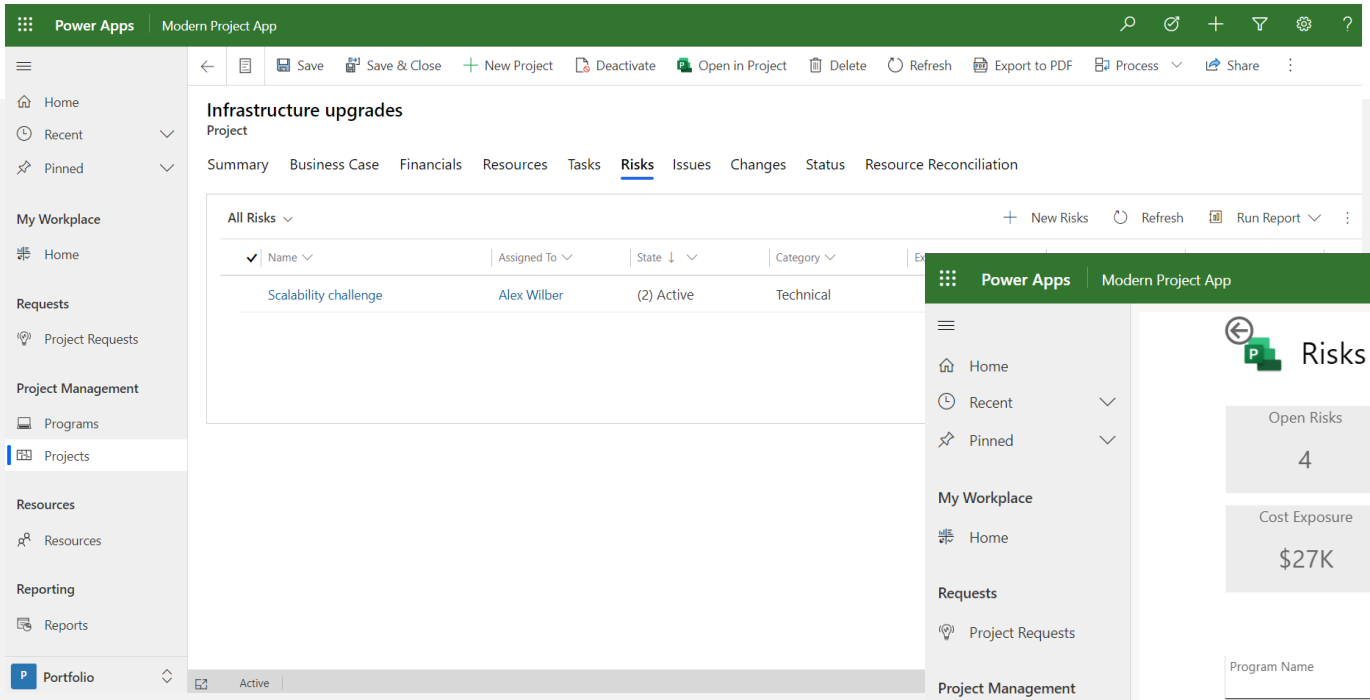
Board

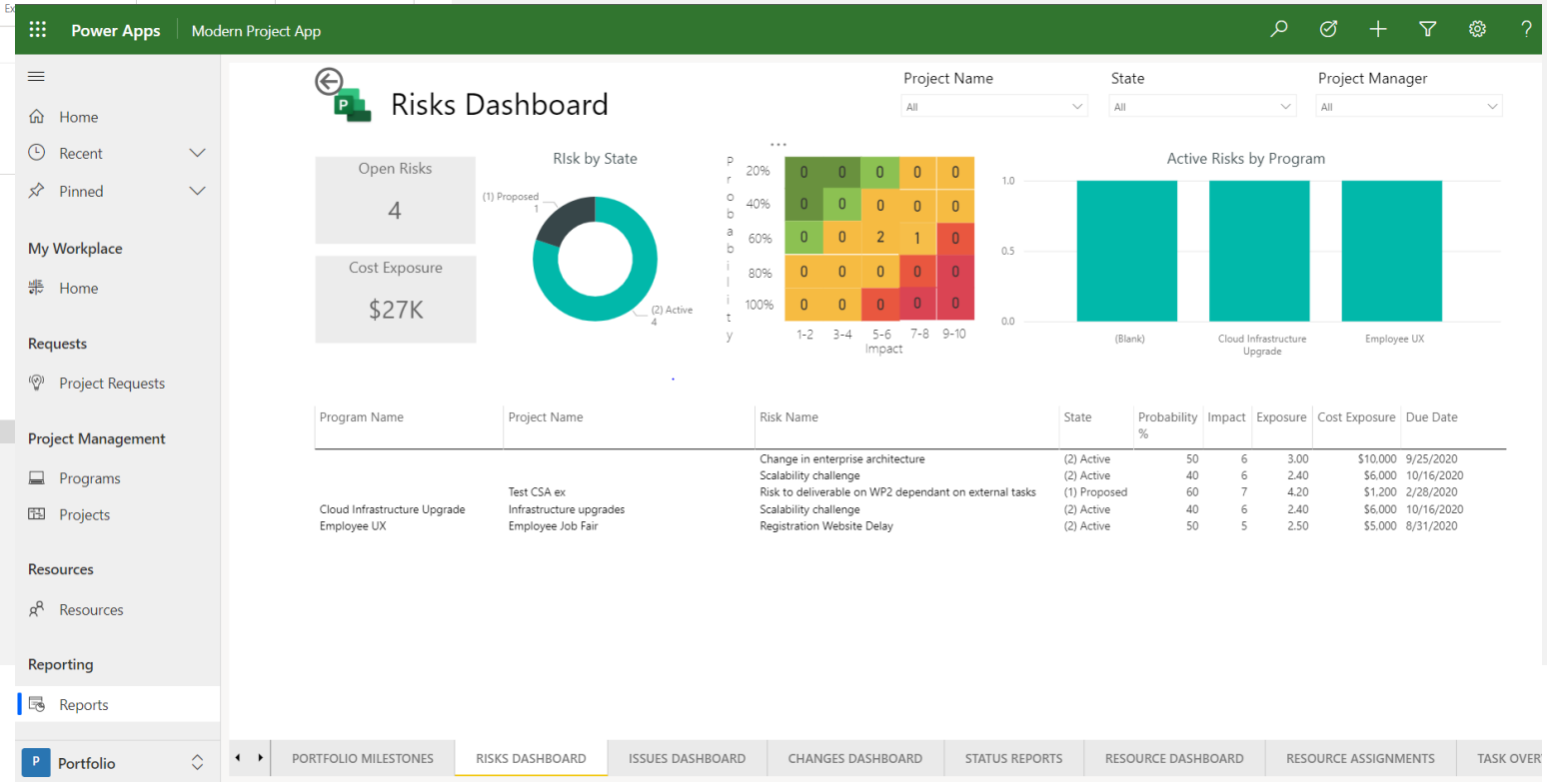


Timeline

Project for the web

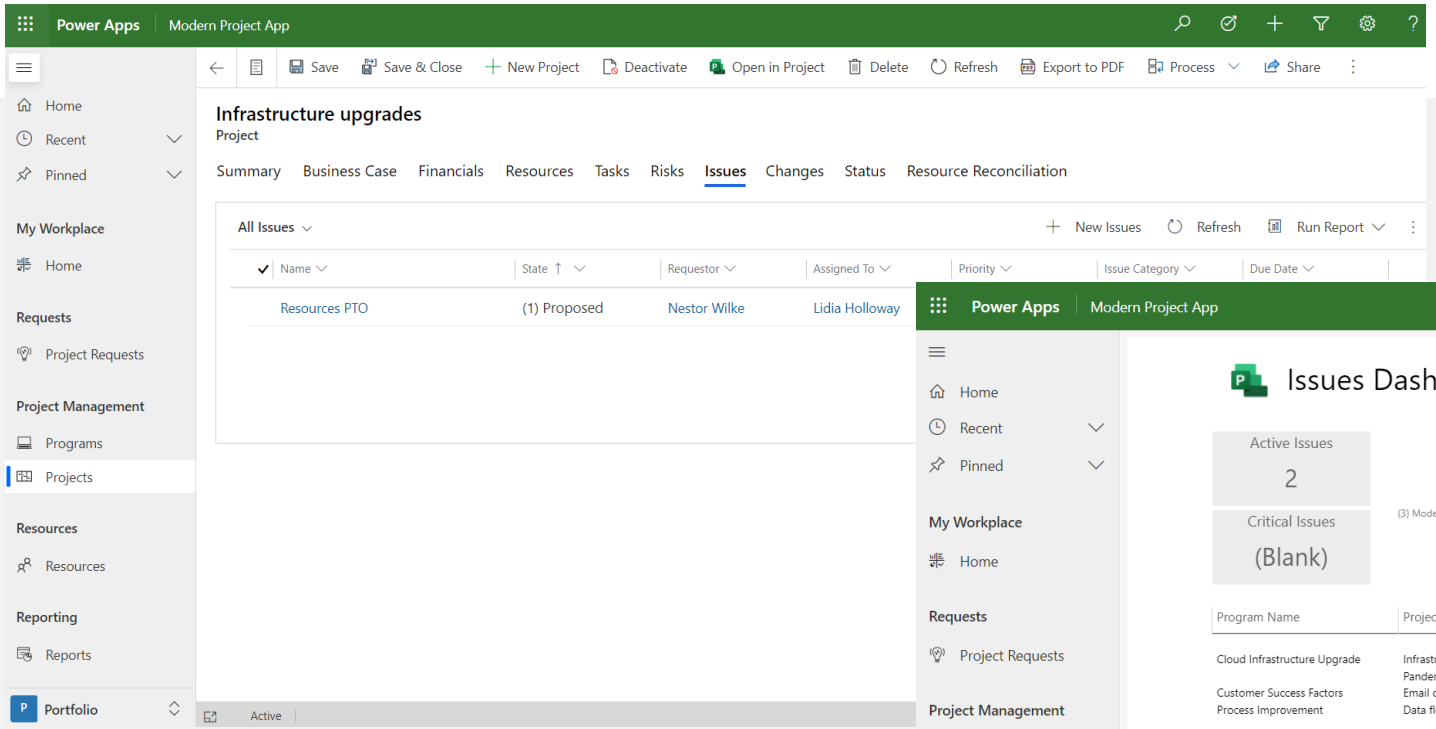
Risk Management

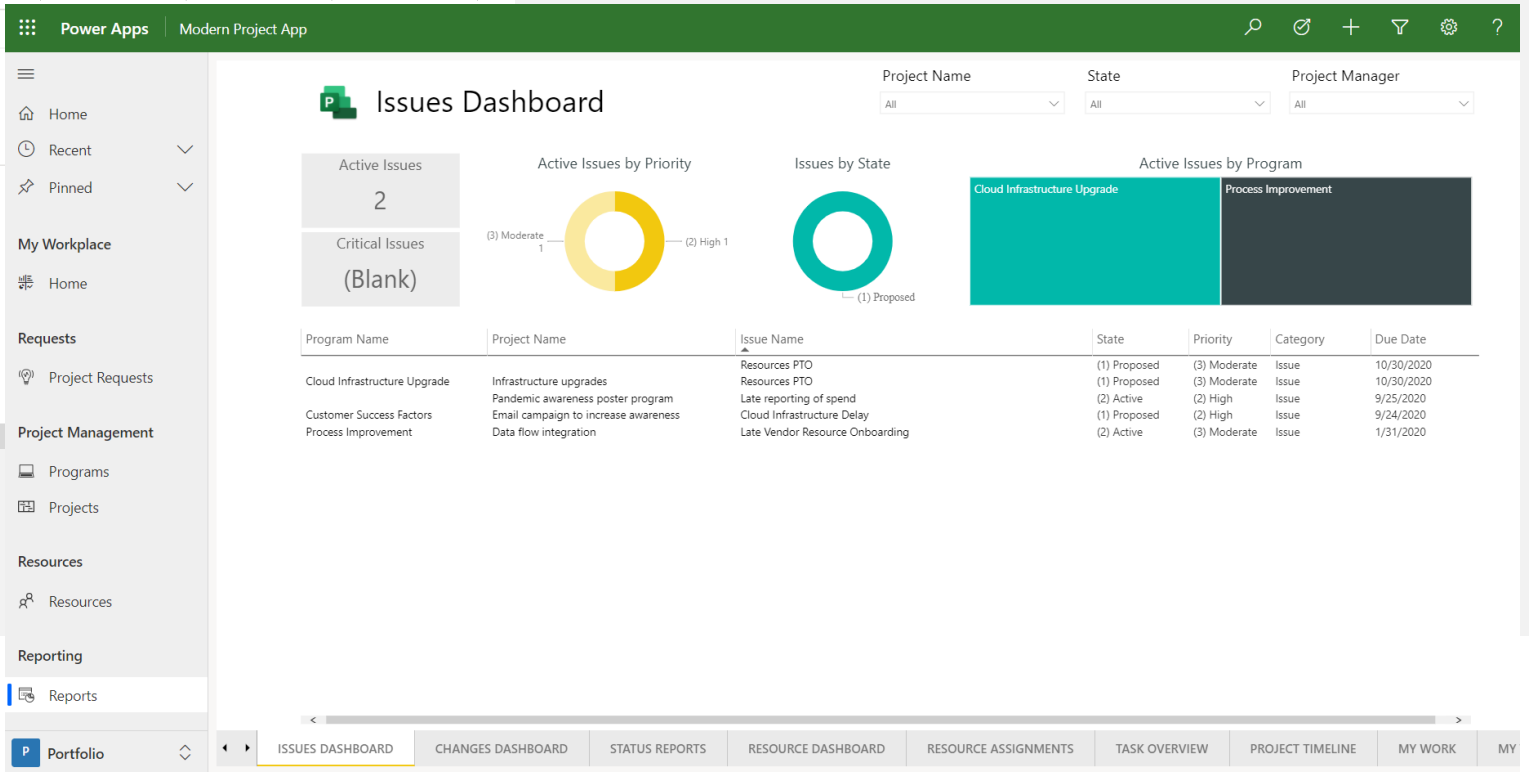




Risk Management

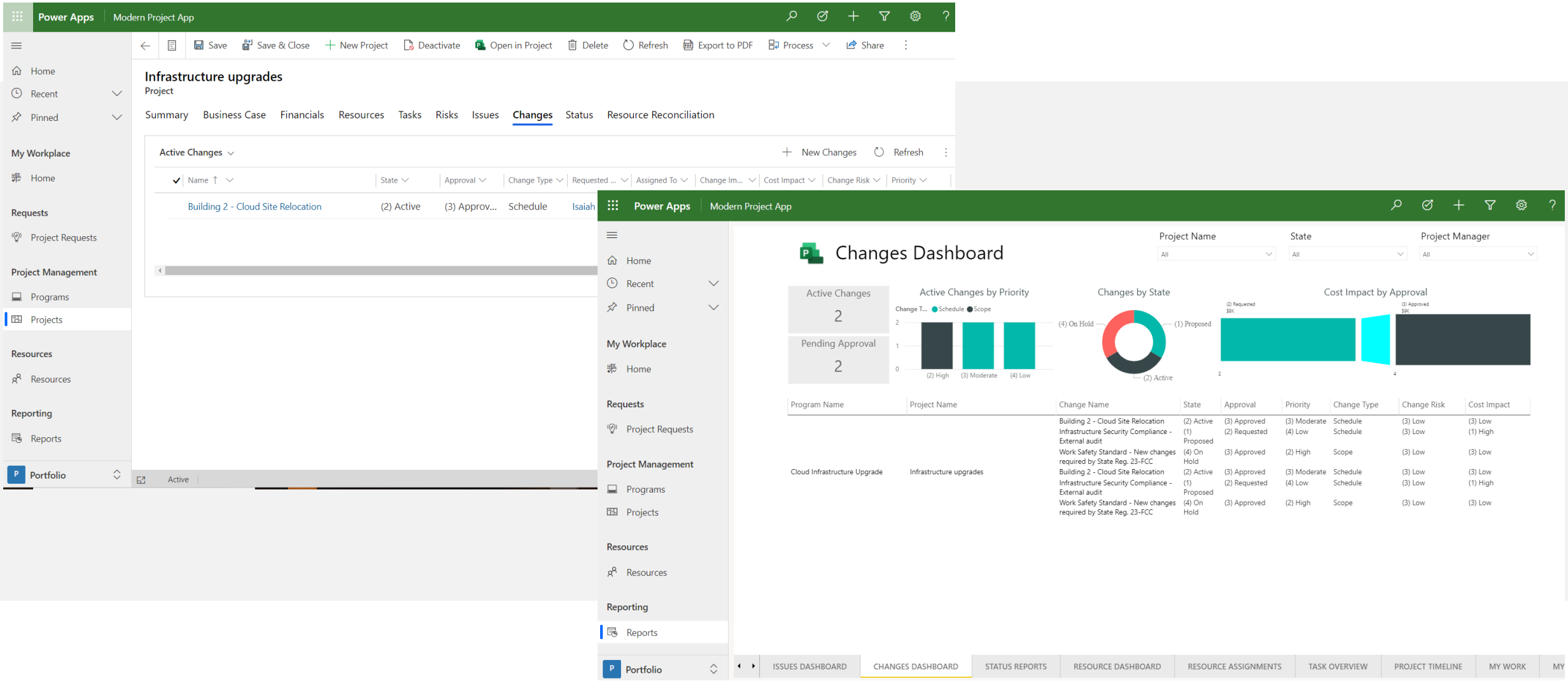
Issue Management





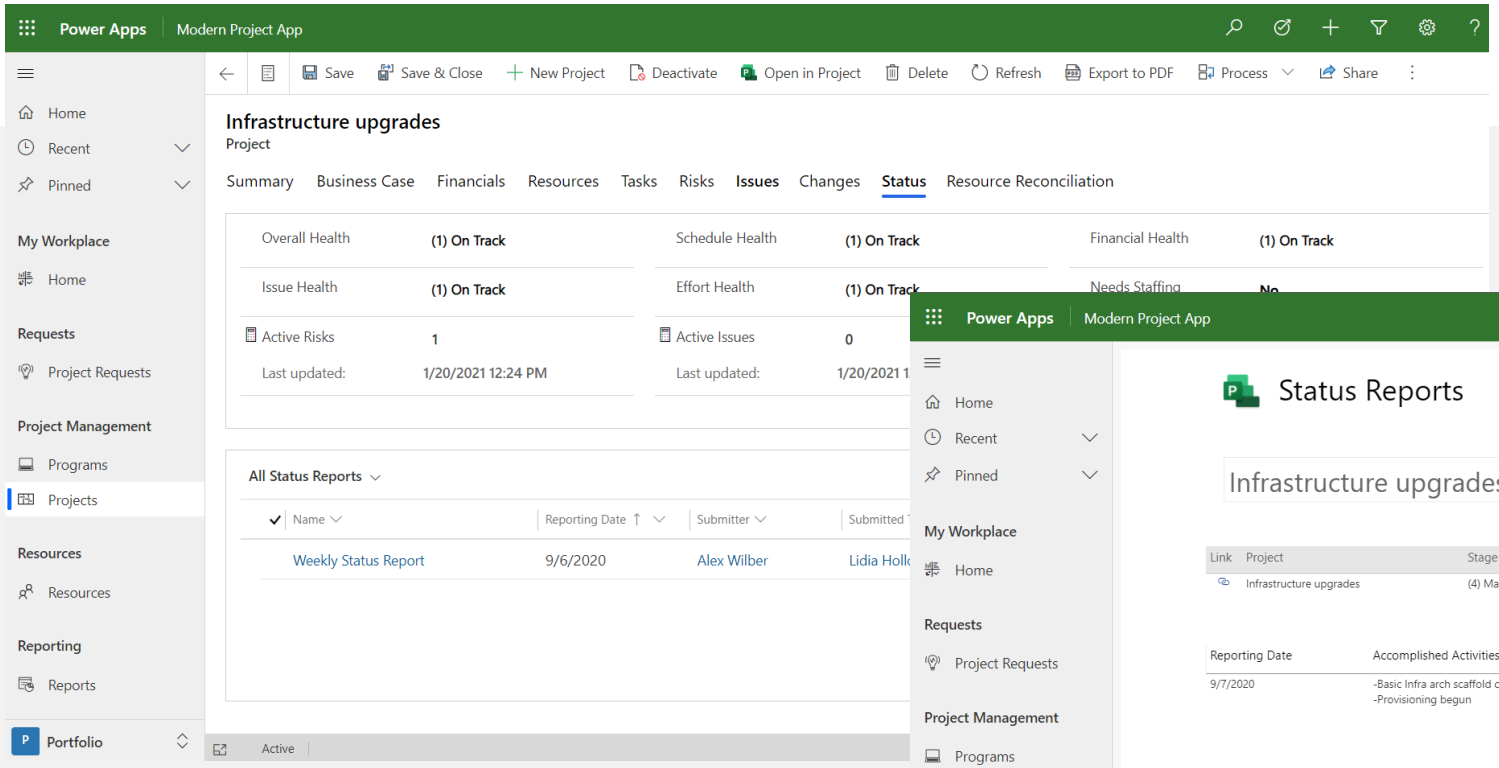
Issue Management

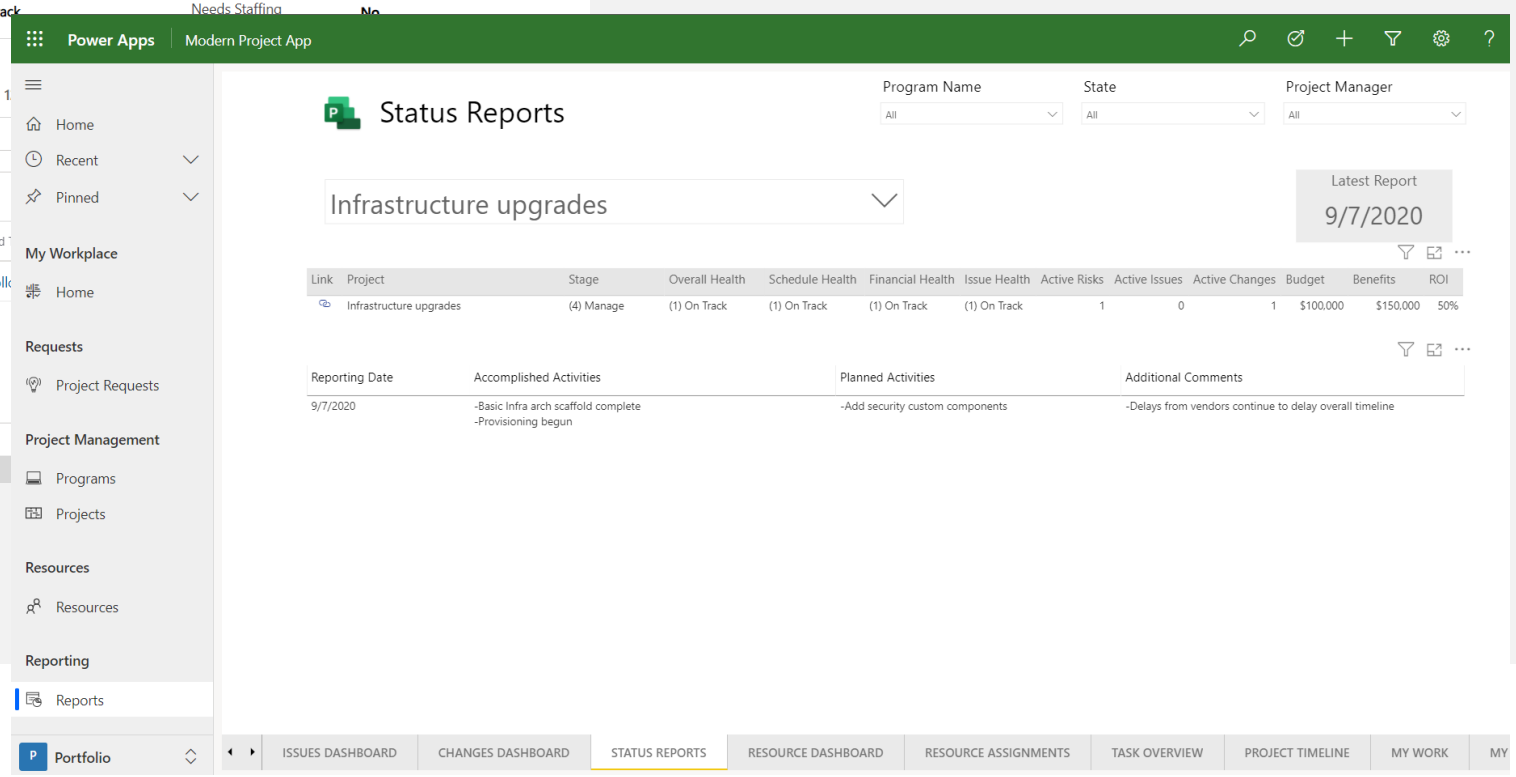
Change Management



Change Management

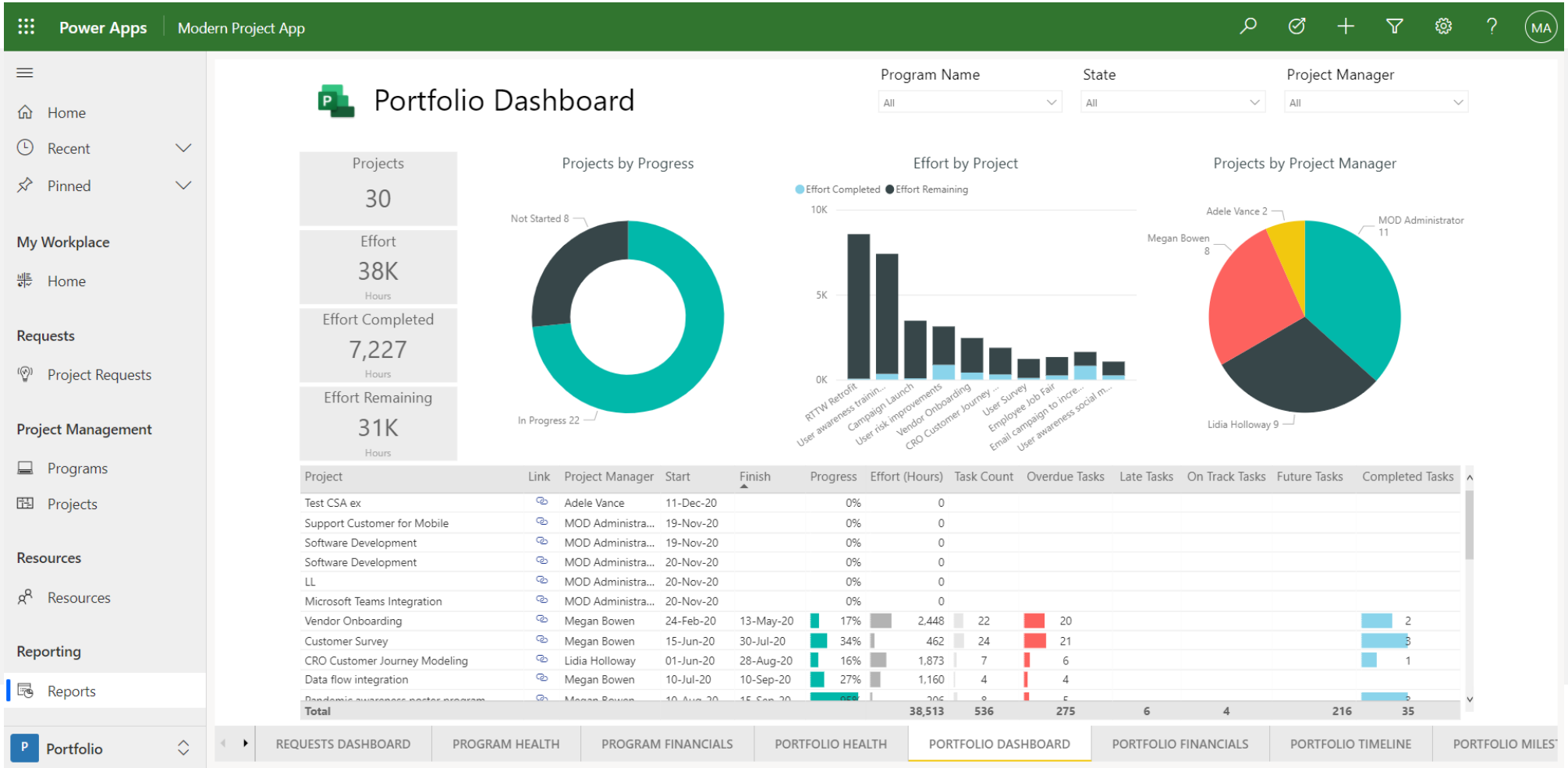
Status Reports





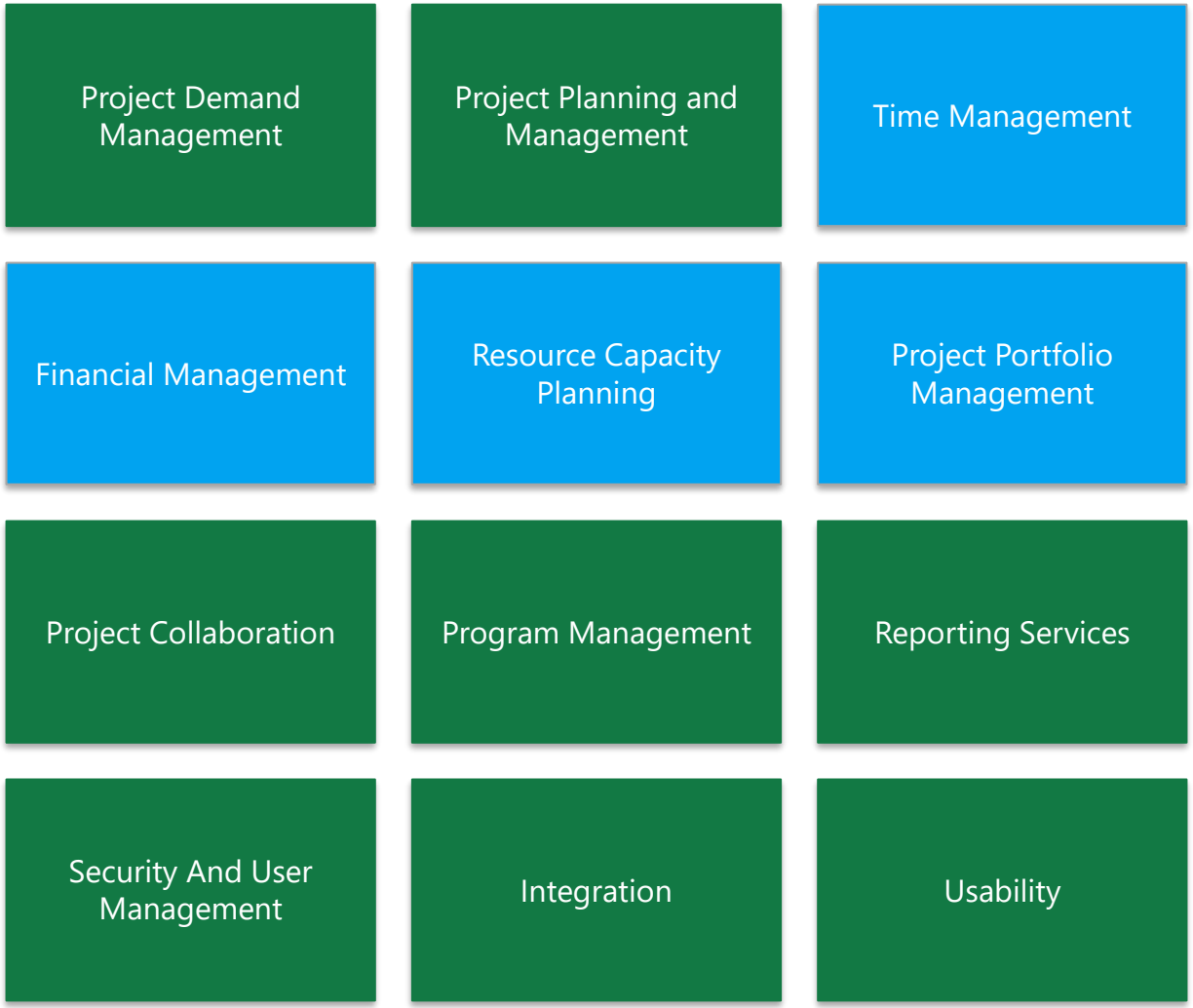
Project Status Reports

Project Intelligence

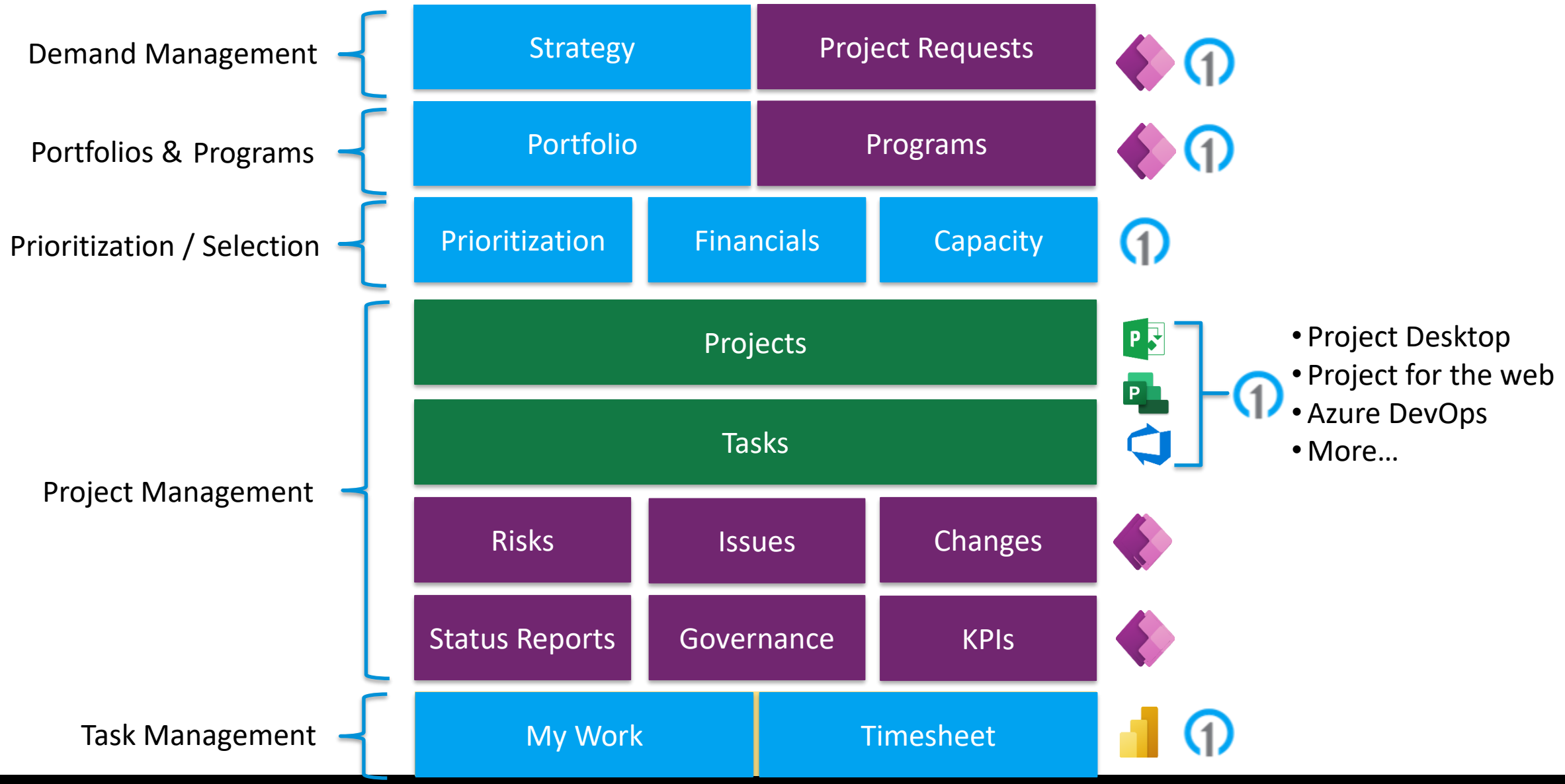


Accelerator Report Pack

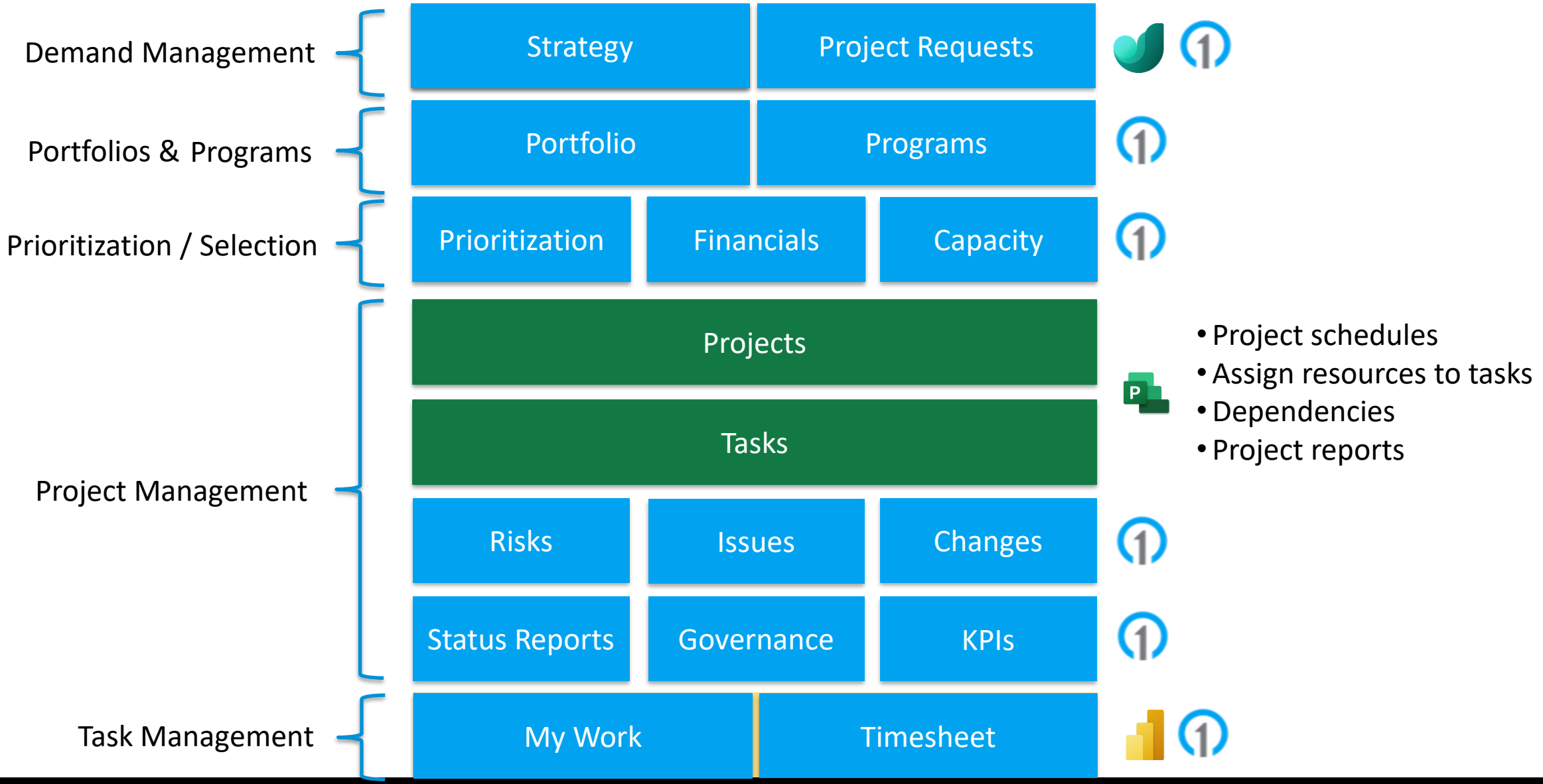
Critical Capabilities for Project Portfolio Management



OnePlan Extends Accelerator to Achieve Full Adaptive PPM

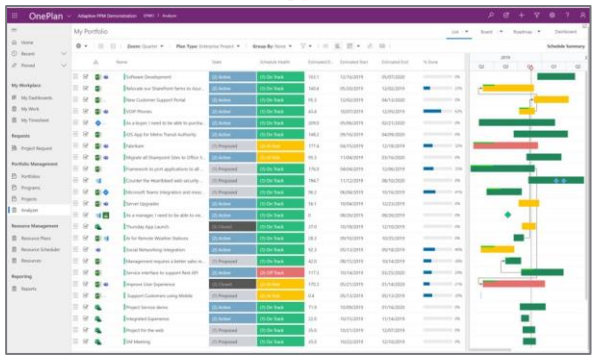


OnePlan Platform Adds Complete Strategic Portfolio Management

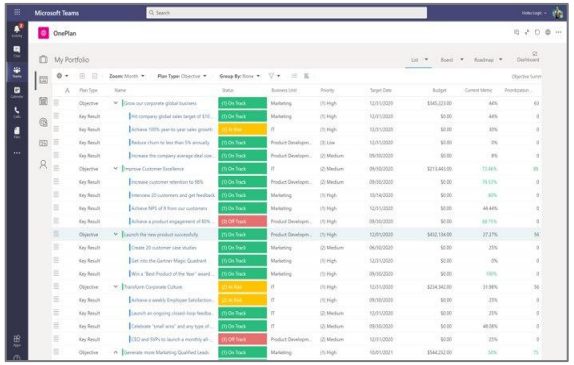


OnePlan

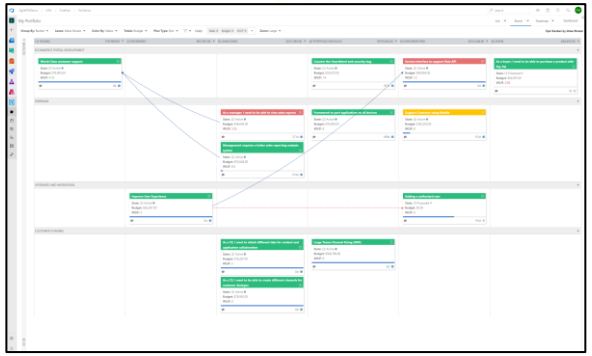
Fused into the tools that you work in everyday.



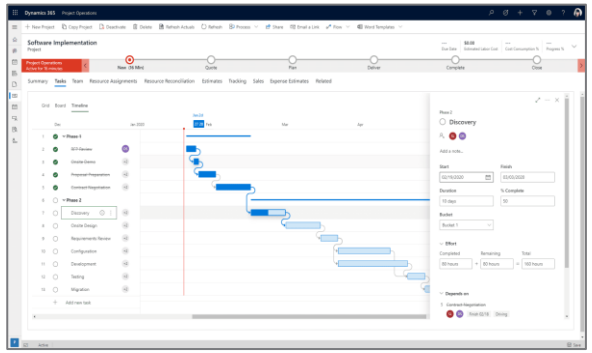
OnePlan in Power Apps



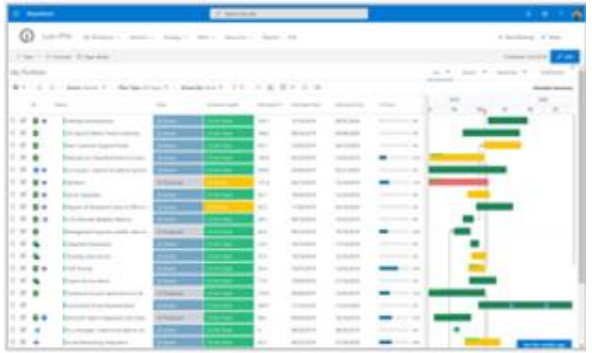
OnePlan in Teams



OnePlan in Azure DevOps



OnePlan in Dynamics 365



OnePlan in SharePoint

Comprehensive Solution for the Microsoft Cloud

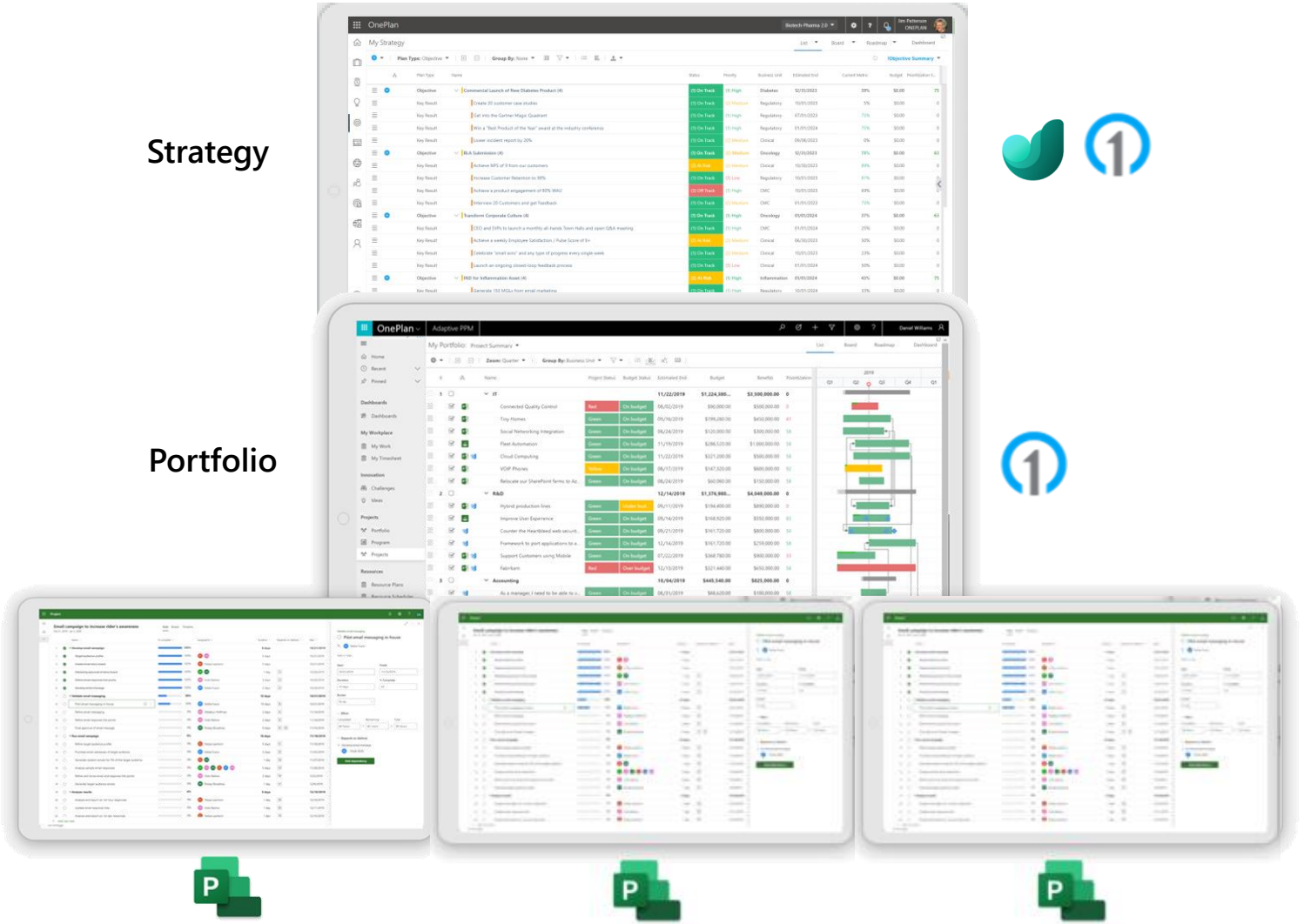
OnePlan

Connecting Strategy to Execution

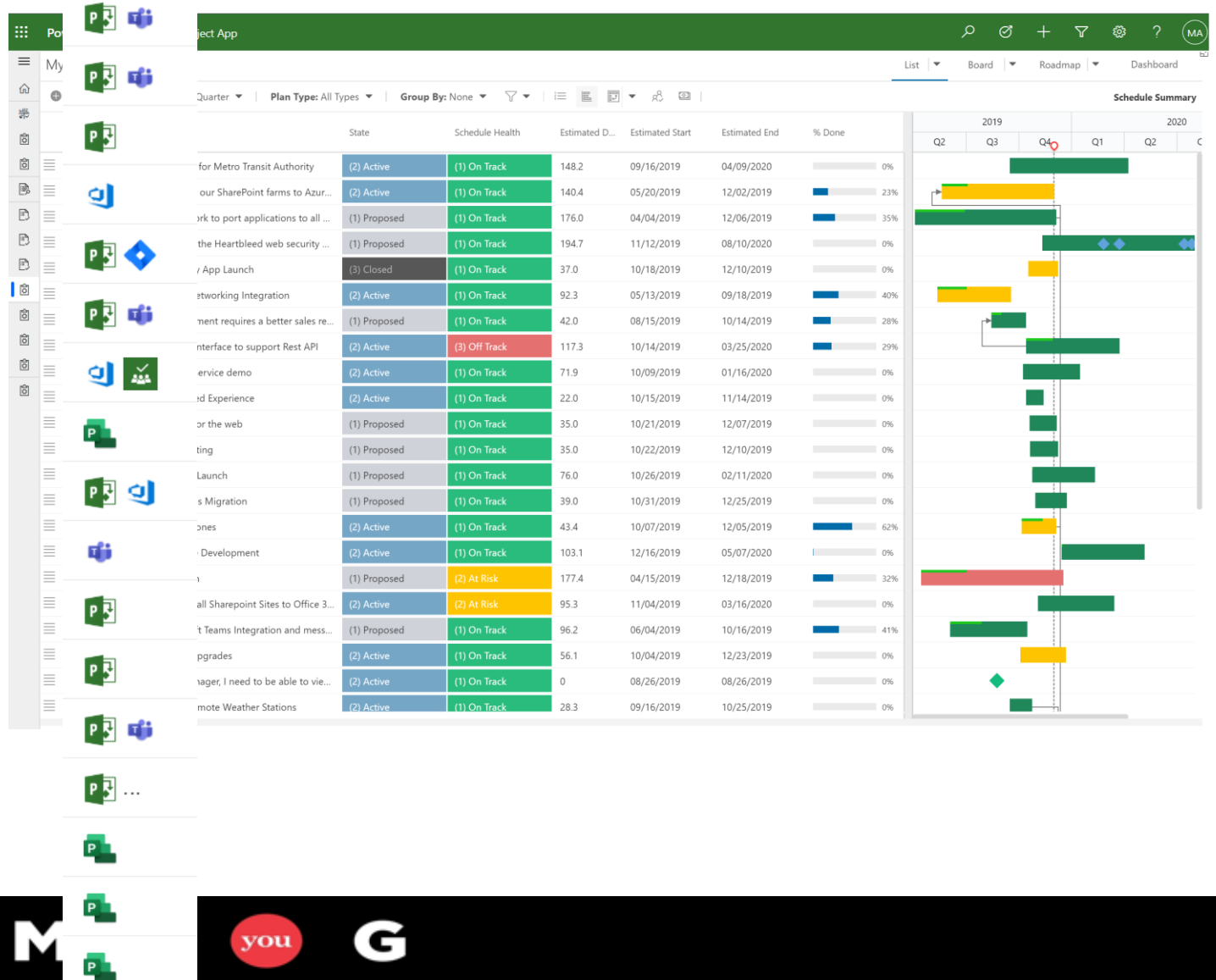
Strategy

Portfolio

Execution



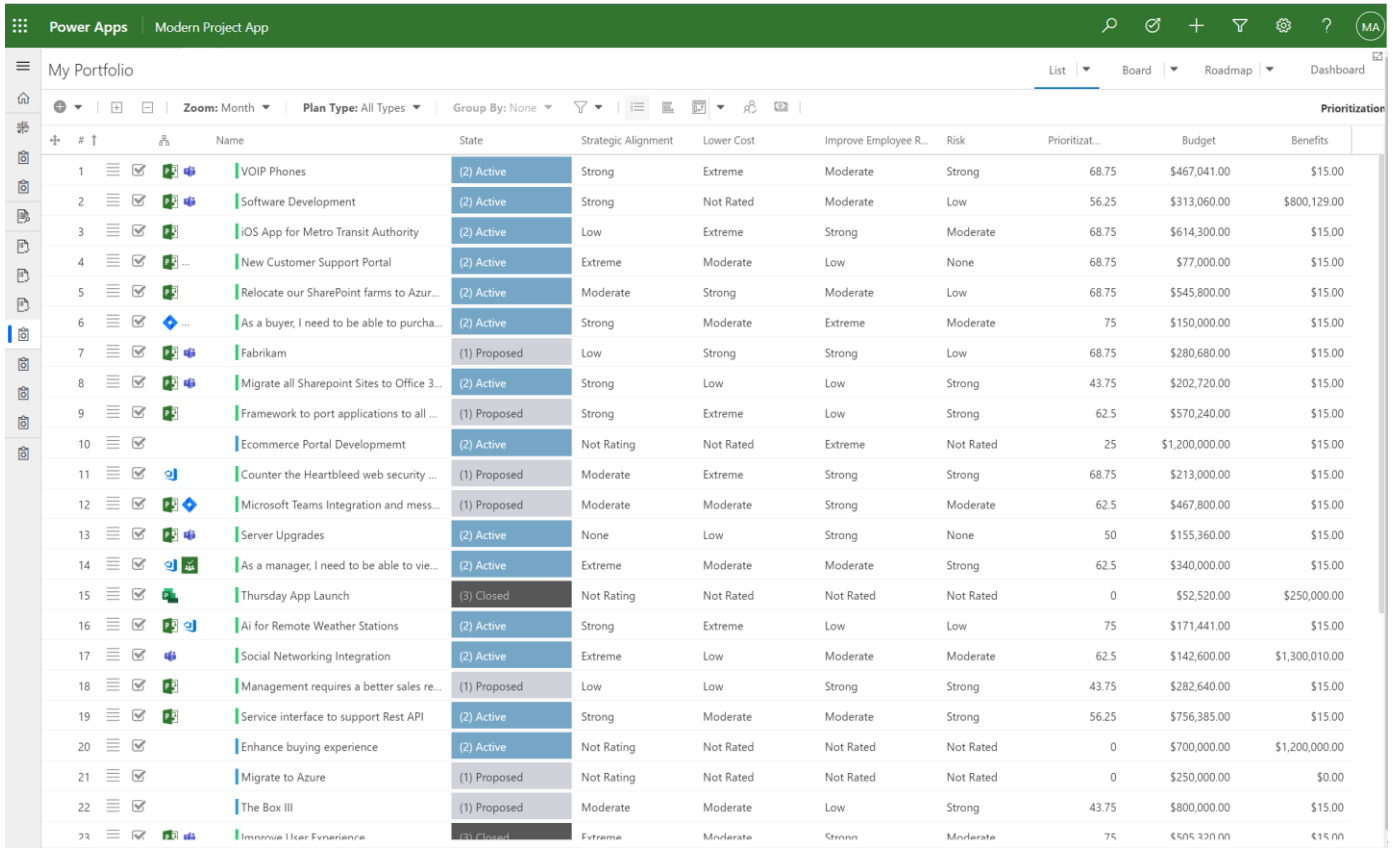
Portfolio Visibility Across All Work



Deliver More Strategic Value

Be predictive, not reactive. Align strategy to investments and manage risk across the portfolio to effectively deliver transformational change.

Portfolio Prioritization

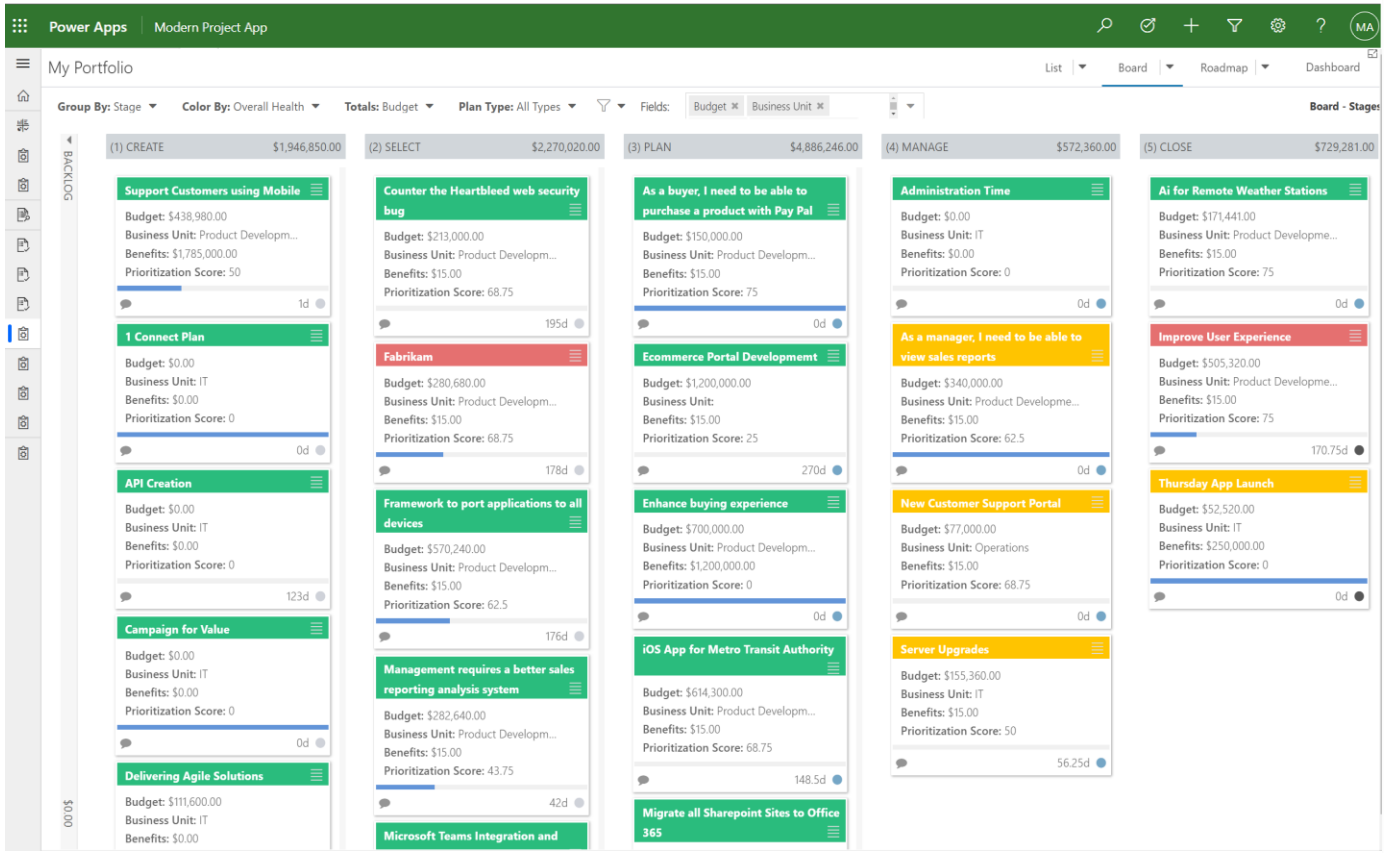


#	Name	State	Strategic Alignment	Lower Cost	Improve Employee R...	Risk	Prioritizat...	Budget	Benefits
1	VOIP Phones	(2) Active	Strong	Extreme	Moderate	Strong	68.75	$467,041.00	$15.00
2	Software Development	(2) Active	Strong	Not Rated	Moderate	Low	56.25	$313,060.00	$800,129.00
3	iOS App for Metro Transit Authority	(2) Active	Low	Extreme	Strong	Moderate	68.75	$614,300.00	$15.00
4	New Customer Support Portal	(2) Active	Extreme	Moderate	Low	None	68.75	$77,000.00	$15.00
5	Relocate our SharePoint farms to Azur...	(2) Active	Moderate	Strong	Moderate	Low	68.75	$545,800.00	$15.00
6	As a buyer, I need to be able to purcha...	(2) Active	Strong	Moderate	Extreme	Moderate	75	$150,000.00	$15.00
7	Fabrikam	(1) Proposed	Low	Strong	Strong	Low	68.75	$280,680.00	$15.00
8	Migrate all Sharepoint Sites to Office 3...	(2) Active	Strong	Low	Low	Strong	43.75	$202,720.00	$15.00
9	Framework to port applications to all ...	(1) Proposed	Strong	Extreme	Low	Strong	62.5	$570,240.00	$15.00
10	Ecommerce Portal Developmemt	(2) Active	Not Rating	Not Rated	Extreme	Not Rated	25	$1,200,000.00	$15.00
11	Counter the Heartbleed web security ...	(1) Proposed	Moderate	Extreme	Strong	Strong	68.75	$213,000.00	$15.00
12	Microsoft Teams Integration and mess...	(1) Proposed	Moderate	Moderate	Strong	Moderate	62.5	$467,800.00	$15.00
13	Server Upgrades	(2) Active	None	Low	Strong	None	50	$155,360.00	$15.00
14	As a manager, I need to be able to vie...	(2) Active	Extreme	Moderate	Moderate	Strong	62.5	$340,000.00	$15.00
15	Thursday App Launch	(3) Closed	Not Rating	Not Rated	Not Rated	Not Rated	0	$52,520.00	$250,000.00
16	Ai for Remote Weather Stations	(2) Active	Strong	Extreme	Low	Low	75	$171,441.00	$15.00
17	Social Networking Integration	(2) Active	Extreme	Low	Moderate	Moderate	62.5	$142,600.00	$1,300,010.00
18	Management requires a better sales re...	(1) Proposed	Low	Low	Strong	Strong	43.75	$282,640.00	$15.00
19	Service interface to support Rest API	(2) Active	Strong	Moderate	Moderate	Strong	56.25	$756,385.00	$15.00
20	Enhance buying experience	(2) Active	Not Rating	Not Rated	Not Rated	Not Rated	0	$700,000.00	$1,200,000.00
21	Migrate to Azure	(1) Proposed	Not Rating	Not Rated	Not Rated	Not Rated	0	$250,000.00	$0.00
22	The Box III	(1) Proposed	Moderate	Moderate	Low	Strong	43.75	$800,000.00	$15.00
23	Improve User Experience	(3) Closed	Extreme	Moderate	Strong	Moderate	75	$505,320.00	$15.00

Deliver More Strategic Value

Be predictive, not reactive. Align strategy to investments and manage risk across the portfolio to effectively deliver transformational change.

Portfolio Kanban Boards (PI Planning)



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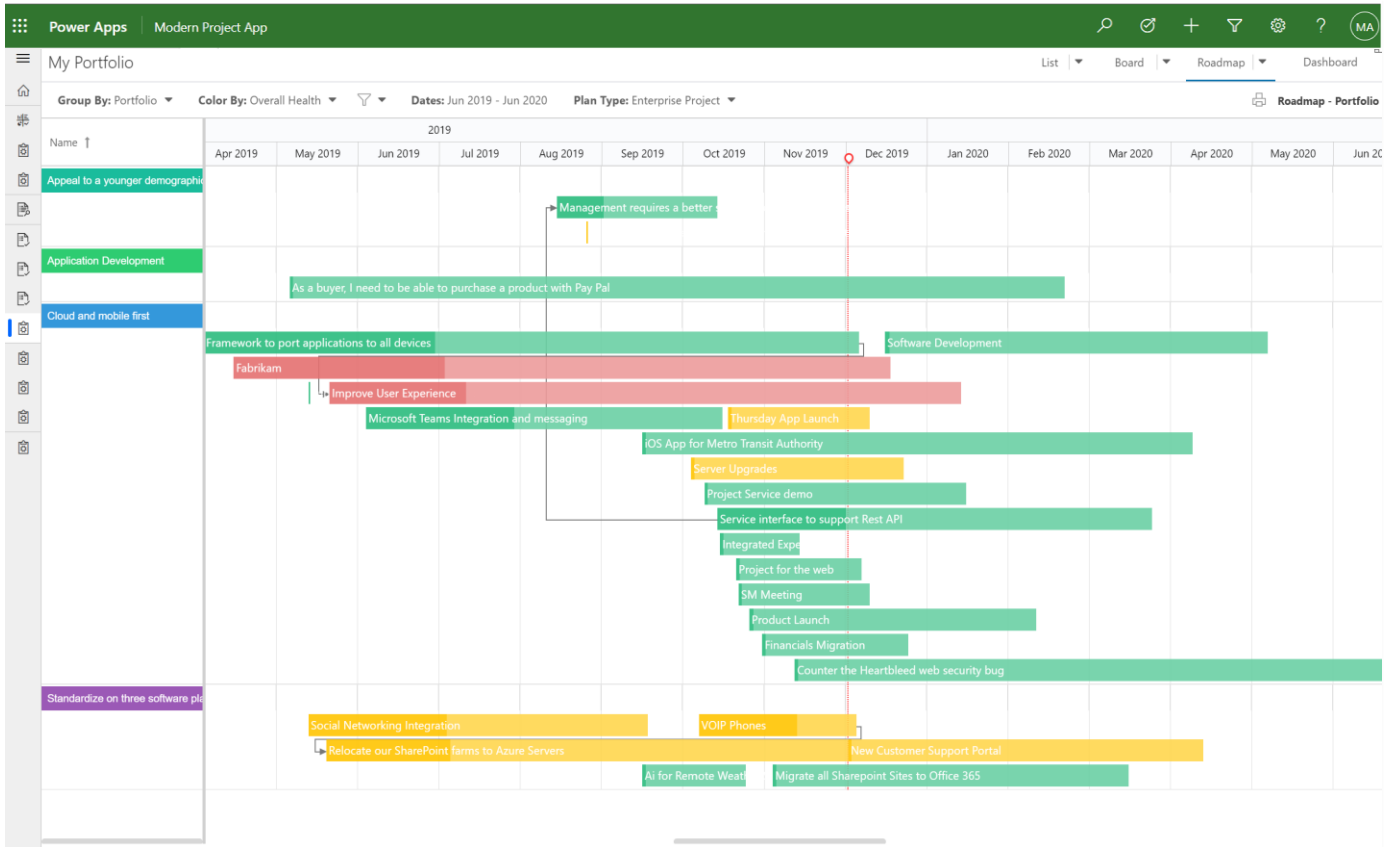
SCALED AGILE PARTNER PLATFORM

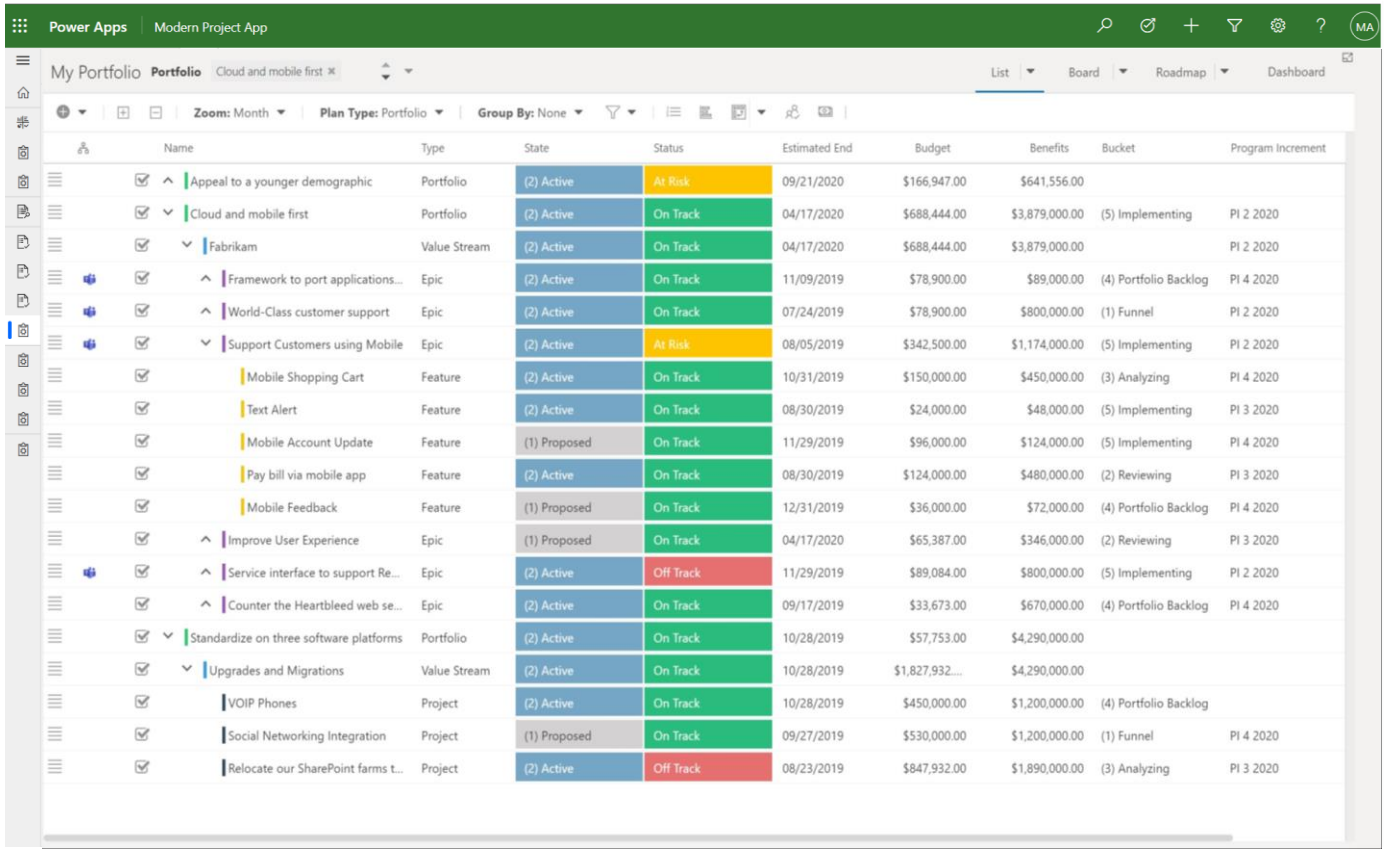
Portfolio Roadmaps



Deliver More Strategic Value

Be predictive, not reactive. Align strategy to investments and manage risk across the portfolio to effectively deliver transformational change.

Portfolio Tree Hierarchy



Name	Type	State	Status	Estimated End	Budget	Benefits	Bucket	Program Increment
Appeal to a younger demographic	Portfolio	(2) Active	At Risk	09/21/2020	$166,947.00	$641,556.00		
Cloud and mobile first	Portfolio	(2) Active	On Track	04/17/2020	$688,444.00	$3,879,000.00	(5) Implementing	PI 2 2020
Fabrikam	Value Stream	(2) Active	On Track	04/17/2020	$688,444.00	$3,879,000.00		PI 2 2020
Framework to port applications...	Epic	(2) Active	On Track	11/09/2019	$78,900.00	$89,000.00	(4) Portfolio Backlog	PI 4 2020
World-Class customer support	Epic	(2) Active	On Track	07/24/2019	$78,900.00	$800,000.00	(1) Funnel	PI 2 2020
Support Customers using Mobile	Epic	(2) Active	At Risk	08/05/2019	$342,500.00	$1,174,000.00	(5) Implementing	PI 2 2020
Mobile Shopping Cart	Feature	(2) Active	On Track	10/31/2019	$150,000.00	$450,000.00	(3) Analyzing	PI 4 2020
Text Alert	Feature	(2) Active	On Track	08/30/2019	$24,000.00	$48,000.00	(5) Implementing	PI 3 2020
Mobile Account Update	Feature	(1) Proposed	On Track	11/29/2019	$96,000.00	$124,000.00	(5) Implementing	PI 4 2020
Pay bill via mobile app	Feature	(2) Active	On Track	08/30/2019	$124,000.00	$480,000.00	(2) Reviewing	PI 3 2020
Mobile Feedback	Feature	(1) Proposed	On Track	12/31/2019	$36,000.00	$72,000.00	(4) Portfolio Backlog	PI 4 2020
Improve User Experience	Epic	(1) Proposed	On Track	04/17/2020	$65,387.00	$346,000.00	(2) Reviewing	PI 3 2020
Service interface to support Re...	Epic	(2) Active	Off Track	11/29/2019	$89,084.00	$800,000.00	(5) Implementing	PI 2 2020
Counter the Heartbleed web se...	Epic	(2) Active	On Track	09/17/2019	$33,673.00	$670,000.00	(4) Portfolio Backlog	PI 4 2020
Standardize on three software platforms	Portfolio	(2) Active	On Track	10/28/2019	$57,753.00	$4,290,000.00		
Upgrades and Migrations	Value Stream	(2) Active	On Track	10/28/2019	$1,827,932....	$4,290,000.00		
VOIP Phones	Project	(2) Active	On Track	10/28/2019	$450,000.00	$1,200,000.00	(4) Portfolio Backlog	
Social Networking Integration	Project	(1) Proposed	On Track	09/27/2019	$530,000.00	$1,200,000.00	(1) Funnel	PI 4 2020
Relocate our SharePoint farms t...	Project	(2) Active	Off Track	08/23/2019	$847,932.00	$1,890,000.00	(3) Analyzing	PI 3 2020

Deliver More Strategic Value

Be predictive, not reactive. Align strategy to investments and manage risk across the portfolio to effectively deliver transformational change.

SCALED AGILE PARTNER PLATFORM

Resource Capacity

Increase Resource Workload Transparency

Intuitive and powerful resource planning designed for managers and teams who are looking for more transparency, clarity, and visibility. You no longer need to spend time in spreadsheets – let OnePlan do the work.

Resource Negotiations

Increase Resource Workload Transparency

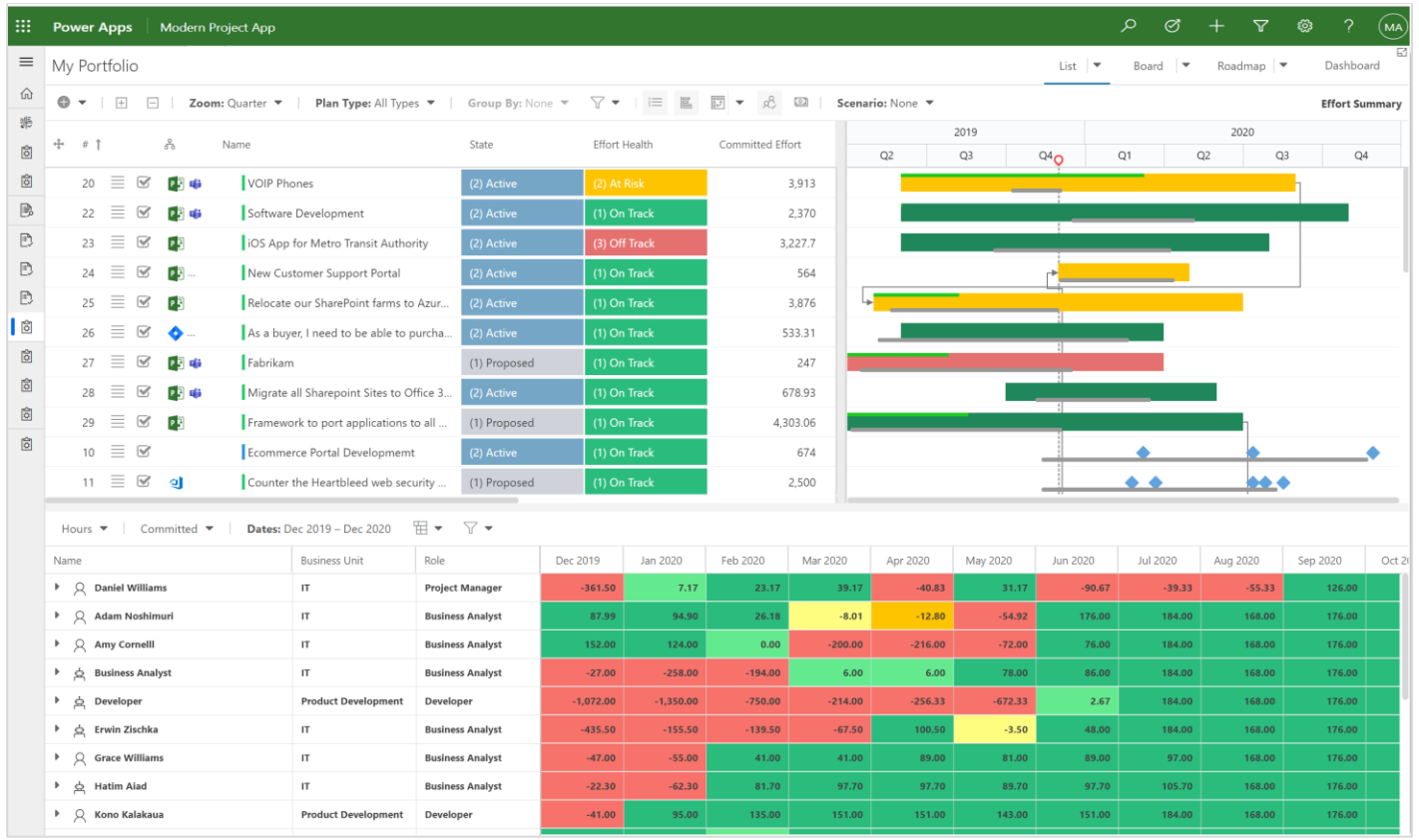
Intuitive and powerful resource planning designed for managers and teams who are looking for more transparency, clarity, and visibility. You no longer need to spend time in spreadsheets – let OnePlan do the work.

Resource Negotiation

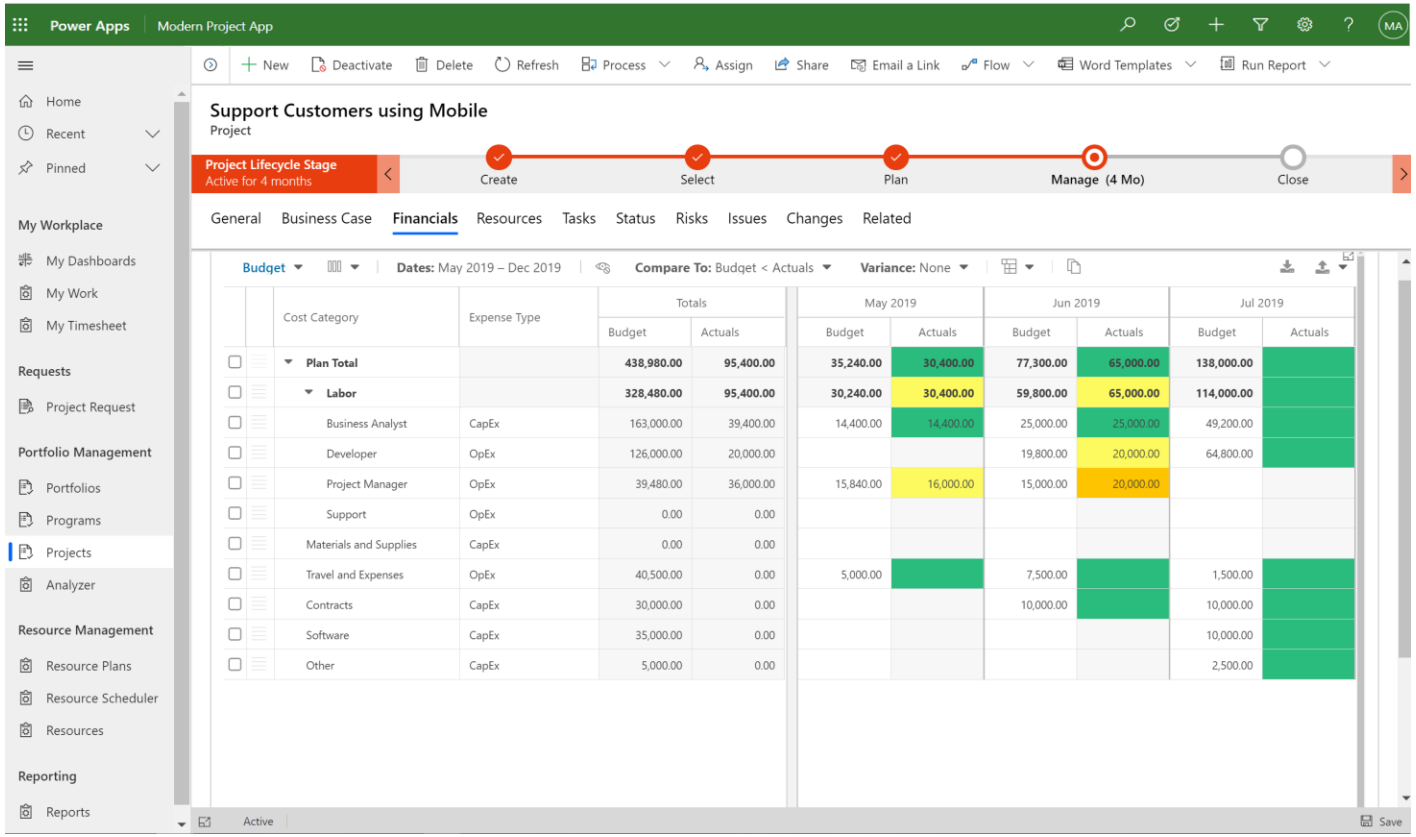
Resource Prioritization

Increase Resource Workload Transparency

Intuitive and powerful resource planning designed for managers and teams who are looking for more transparency, clarity, and visibility. You no longer need to spend time in spreadsheets – let OnePlan do the work.



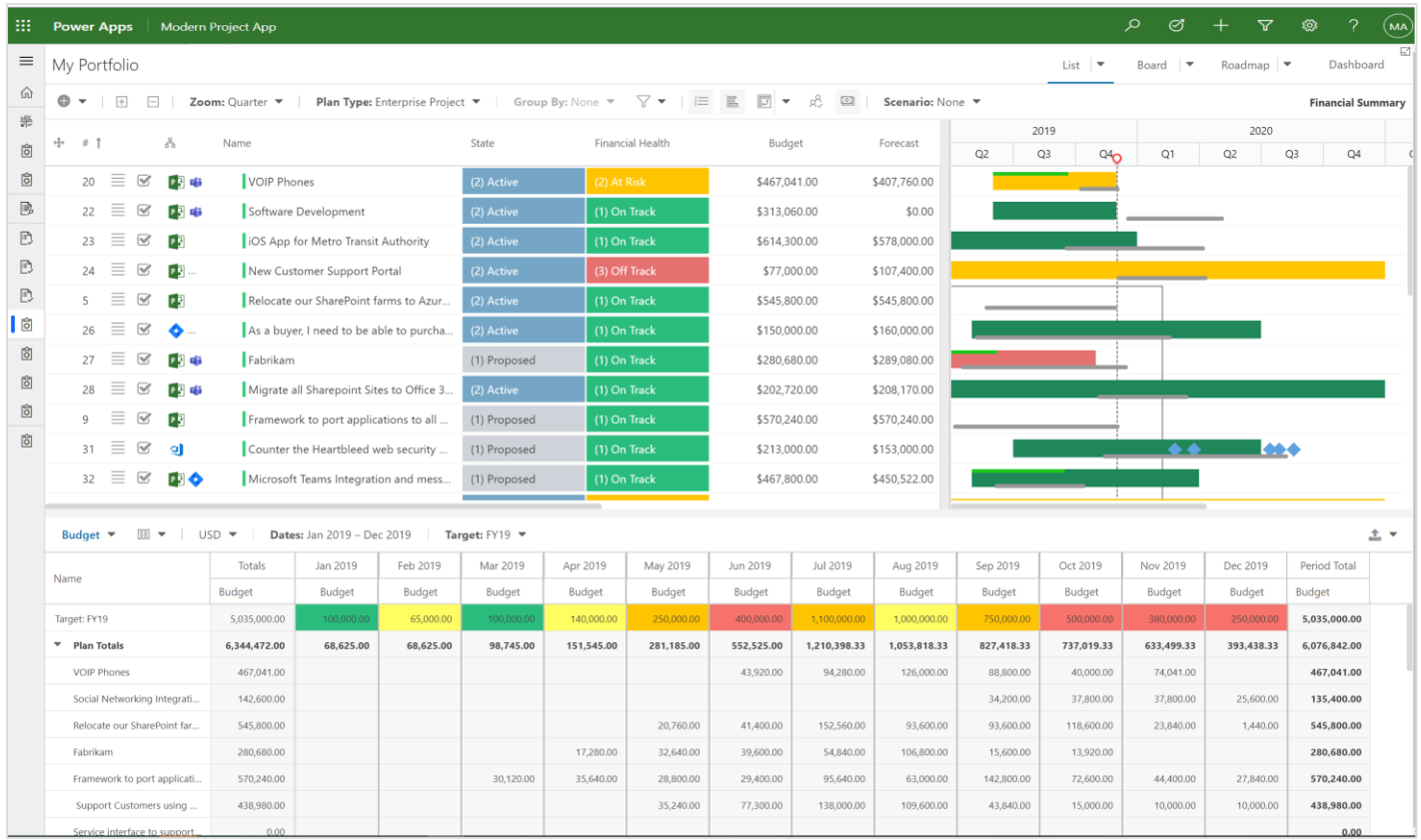
Financial Planning



Optimize Financial Investments

Promote visibility and drive financial performance of investments with streamlined budgeting, estimating and tracking across programs and portfolios.

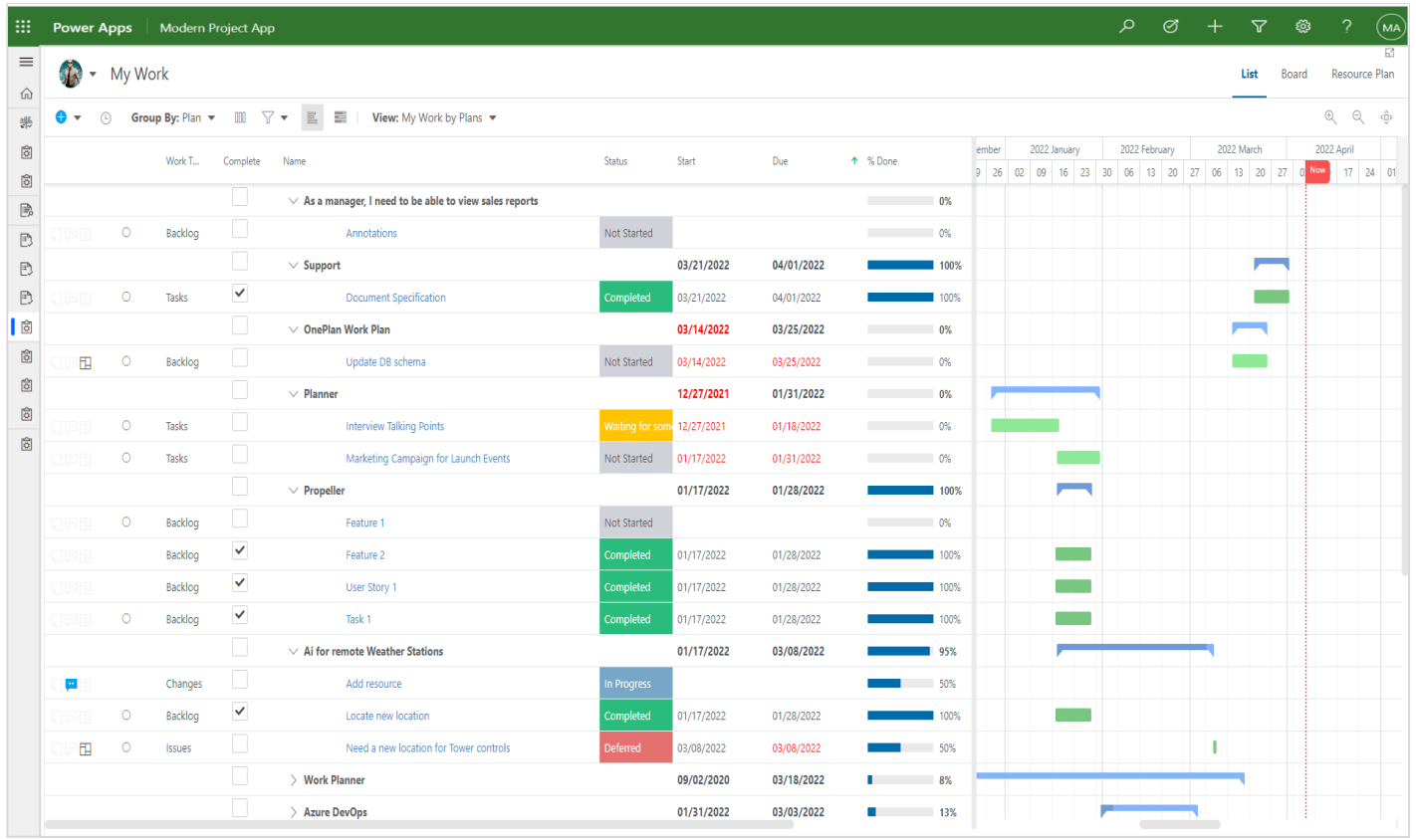
Financial Prioritization



Optimize Financial Investments

Promote visibility and drive financial performance of investments with streamlined budgeting, estimating and tracking across programs and portfolios.

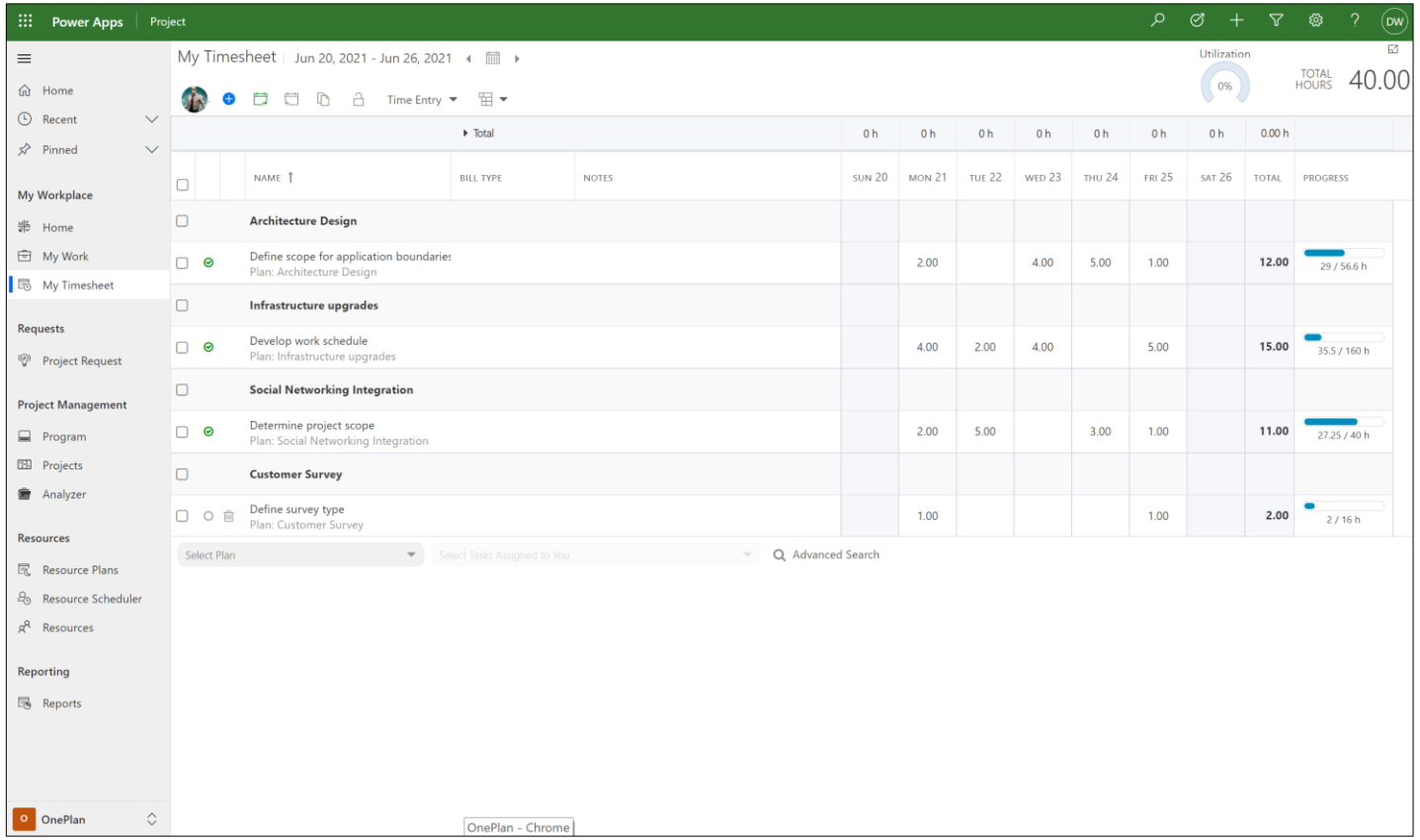
My Work



Provide Updates on All Assignments

Collaborative participation from team members, by providing a central place to provide status and updates on all work items assigned to them via OnePlan's My Work capability.

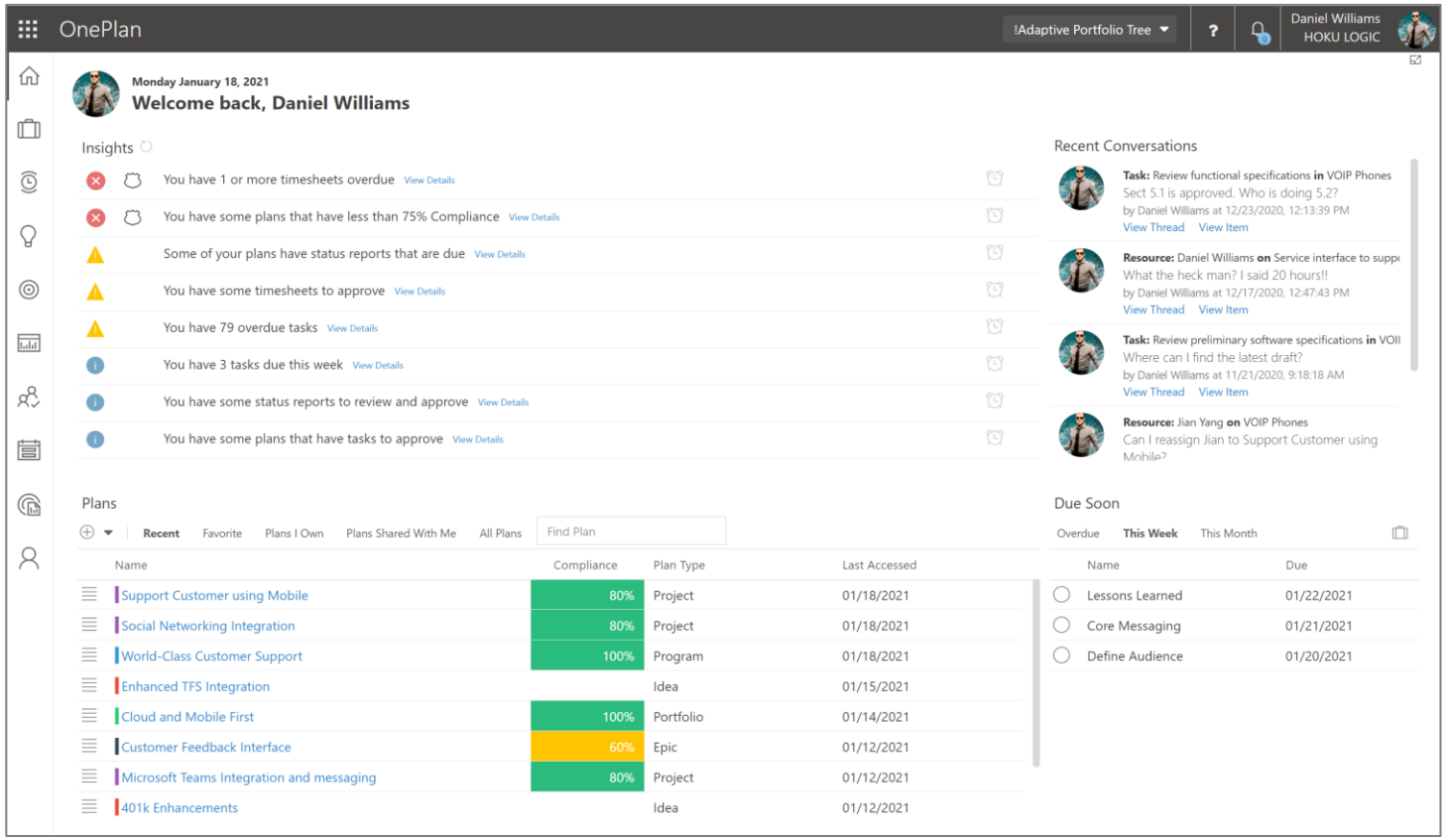
Timesheets



Track Time On Investments

Unleash data-driven insights, increase productivity and bring overall awareness to what your teams are working on through OnePlan's time tracking capabilities.

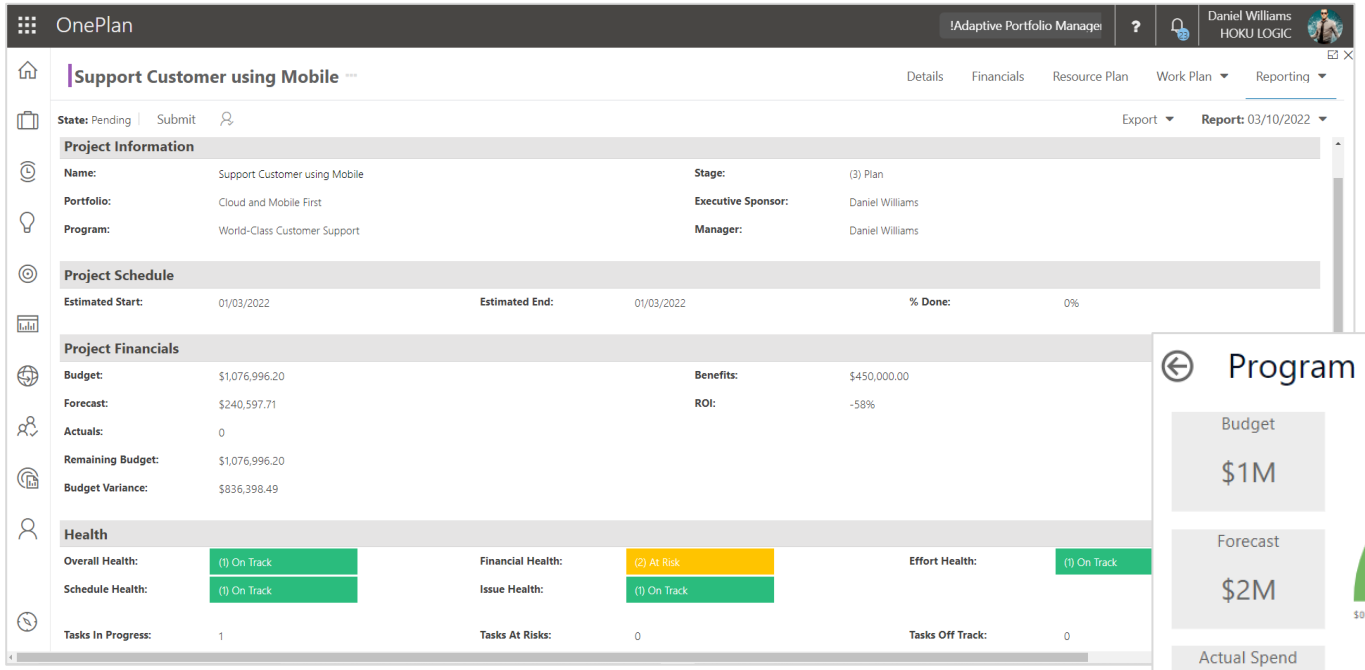
Insights and AI



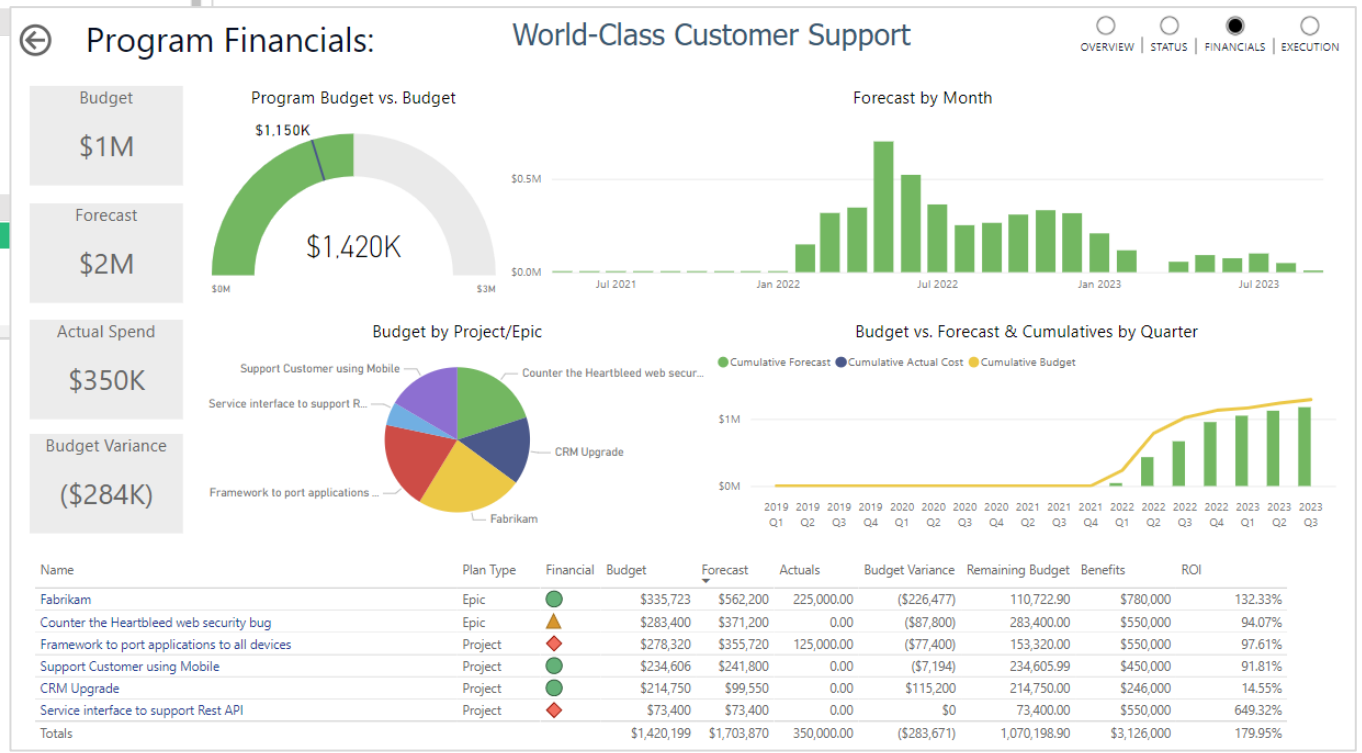
Improve Data Accuracy and Team Productivity with OnePlan's Insights AI

OnePlan's Artificial Intelligence helps drive the adoption of your portfolio management standards. Insights AI gives you objective metrics on how well your teams are performing. It provides guidance for team members on which processes and data they should prioritize.

Consistent Status and Reporting



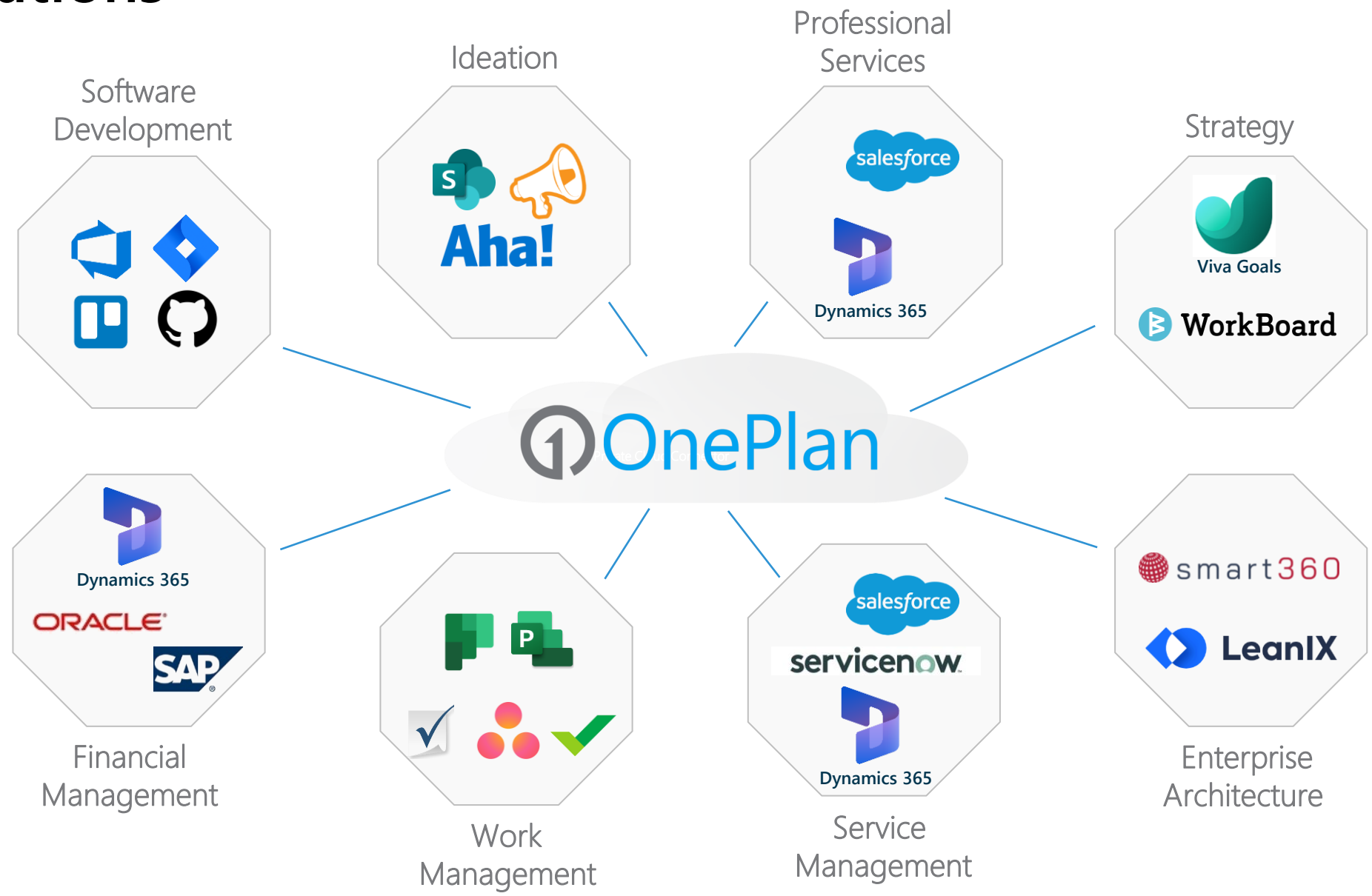
Project Status Reports



Dashboards & Analytics

OnePlan Integrations

- Data / field mapping
- Business rules
- Workflows
- Scheduling
- Logging
- Extensible and Flexible

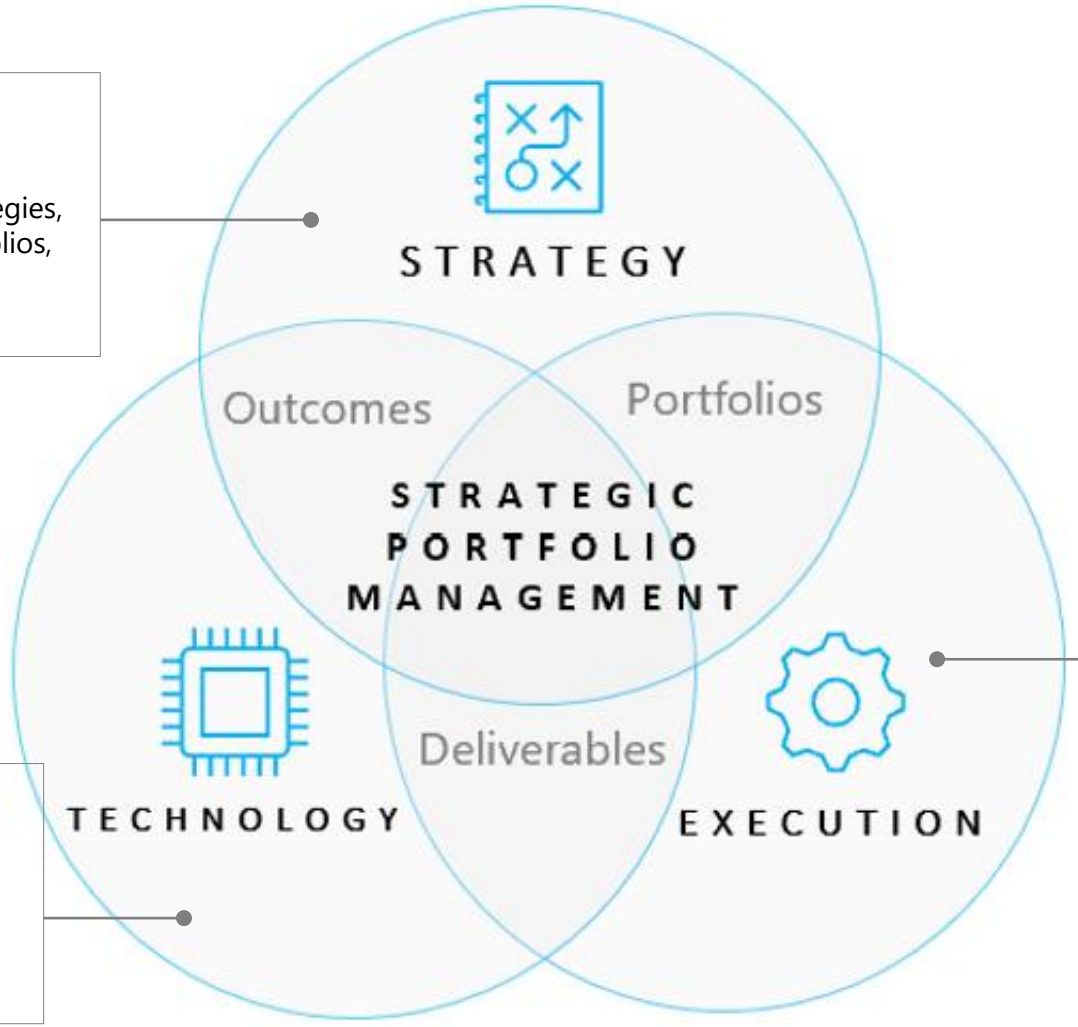


The Move to Strategic Portfolio Management (SPM)

The OnePlan team's purpose is to help your organization on its path to innovation, flexibility, and speed by offering technology and consulting services to suit your needs at different stages of your journey.

BUSINESS LEADERS

Solutions that define business goals and strategies, as well as track progress at the levels of portfolios, business capabilities, products and strategic initiatives



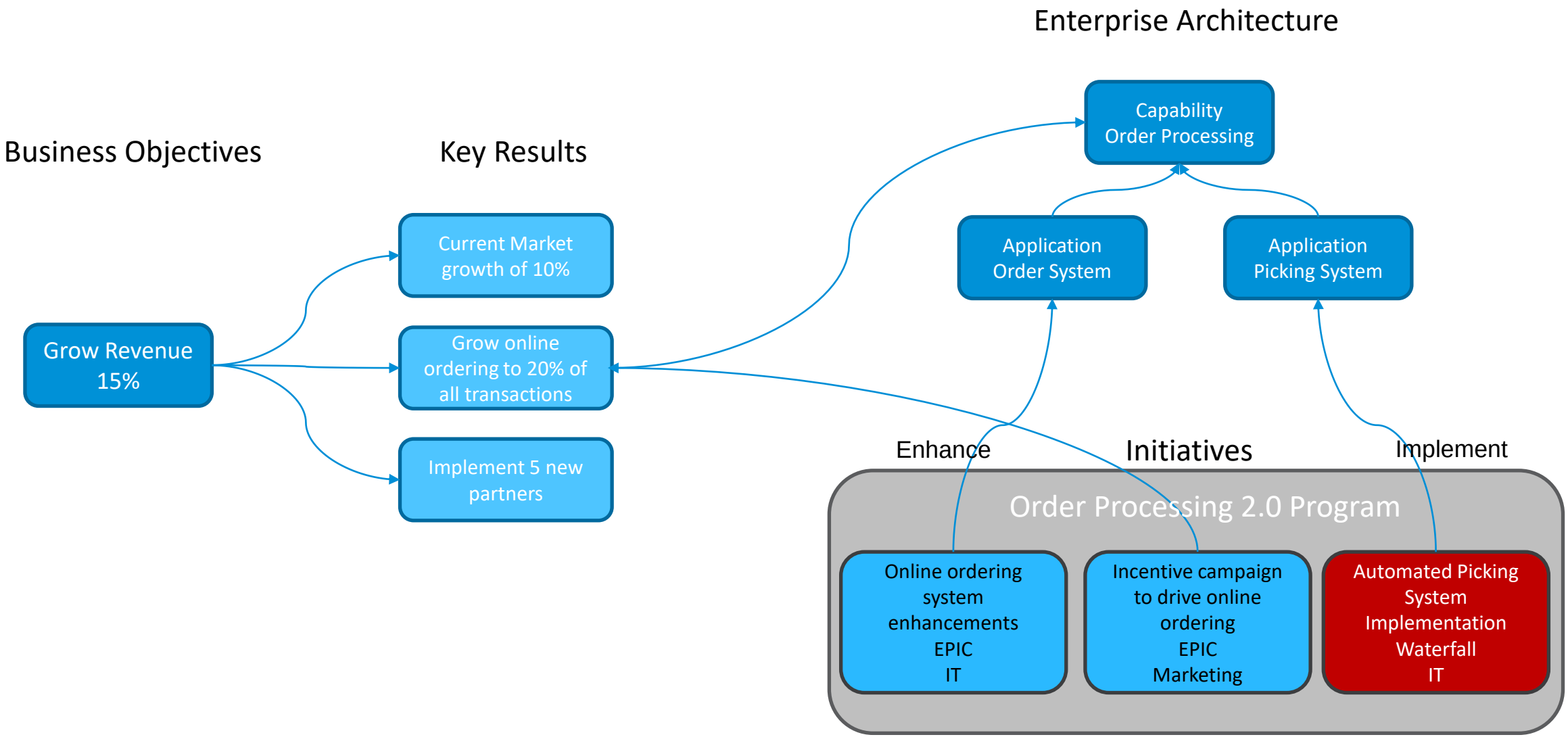
EXECUTION LEADERS

Solutions that support the selection, planning and execution of a variety of different Initiatives across the organization

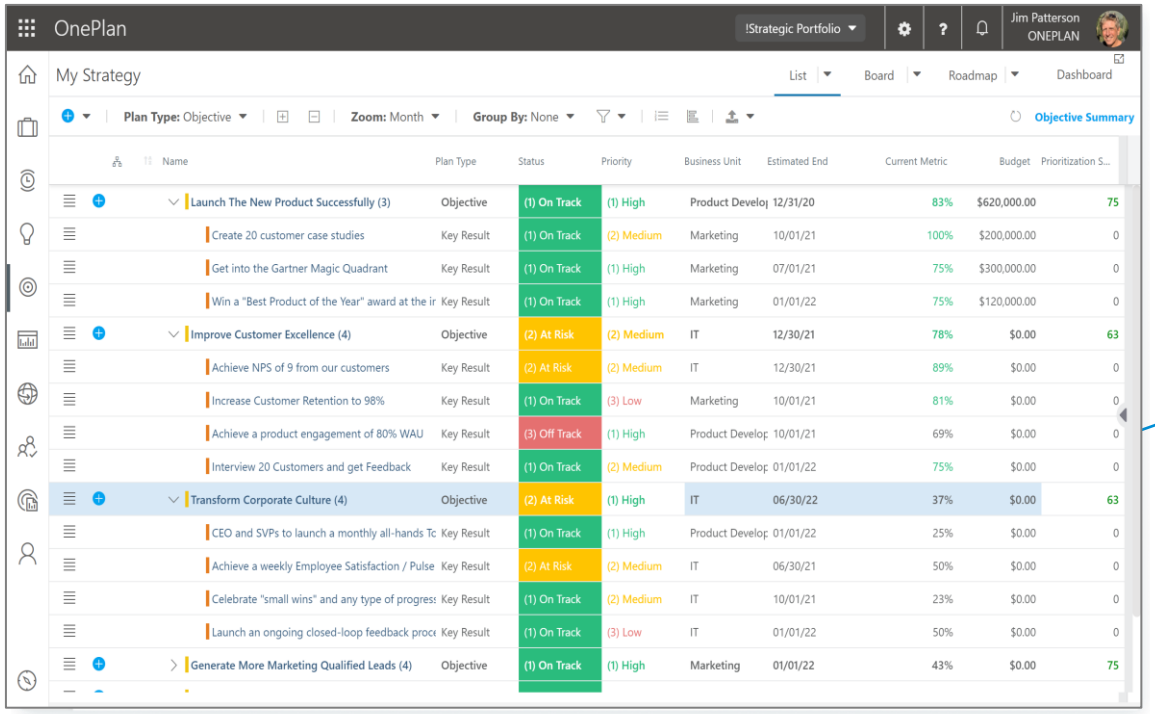
IT LEADERS

Solutions that can present the interrelated perspectives, views and considerations needed to make strategic decisions across the business.

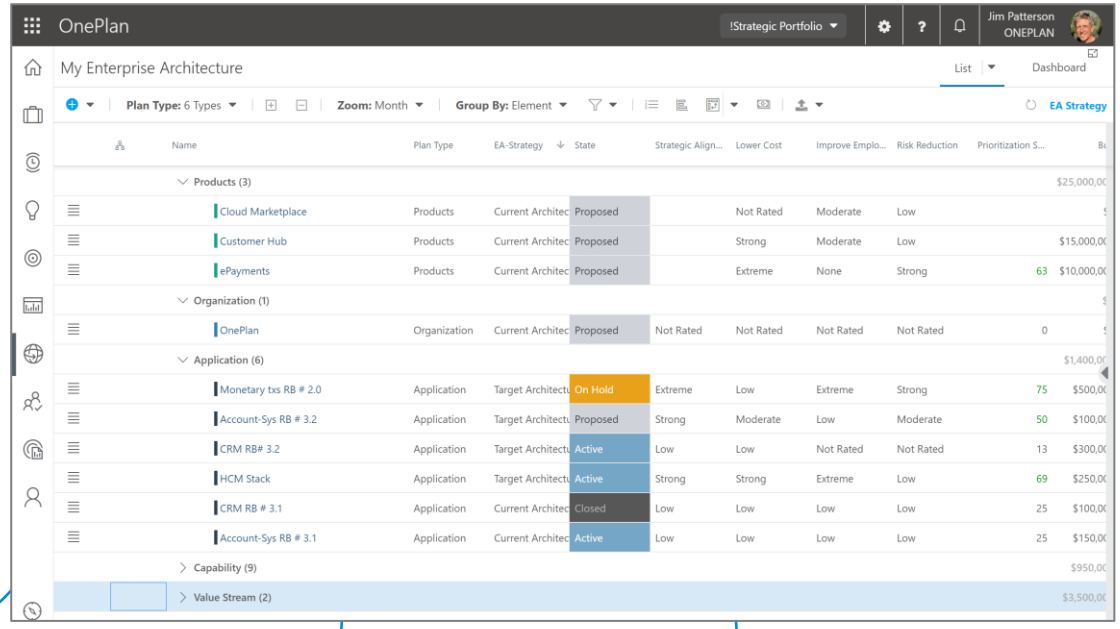
Further Alignment Needed for Strategic Portfolio Management (SPM)



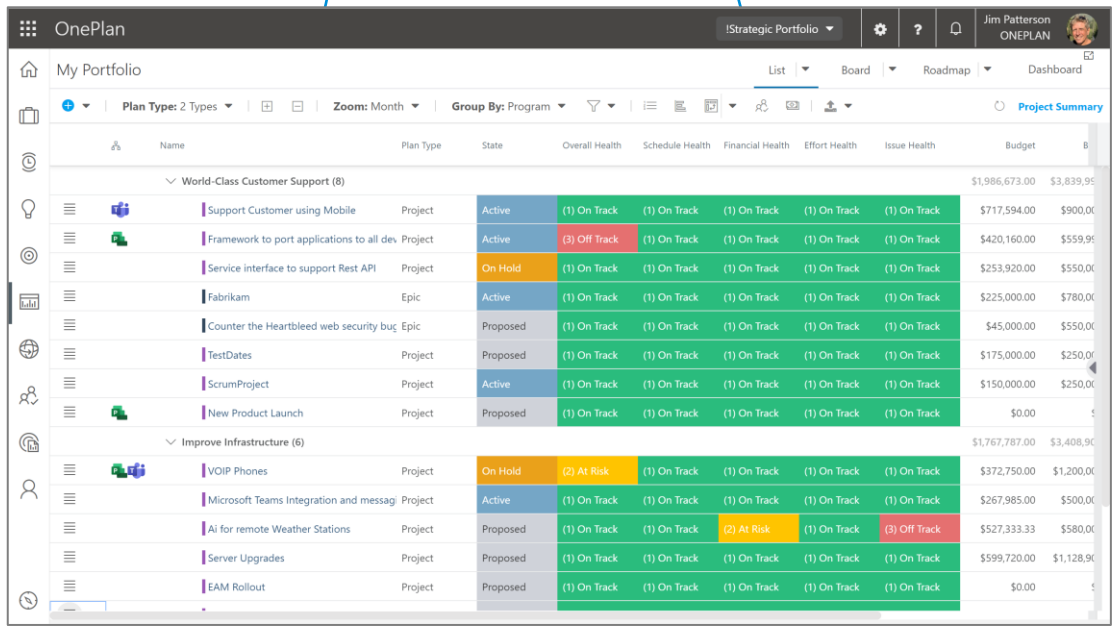
One Comprehensive Solution



Strategic Plan

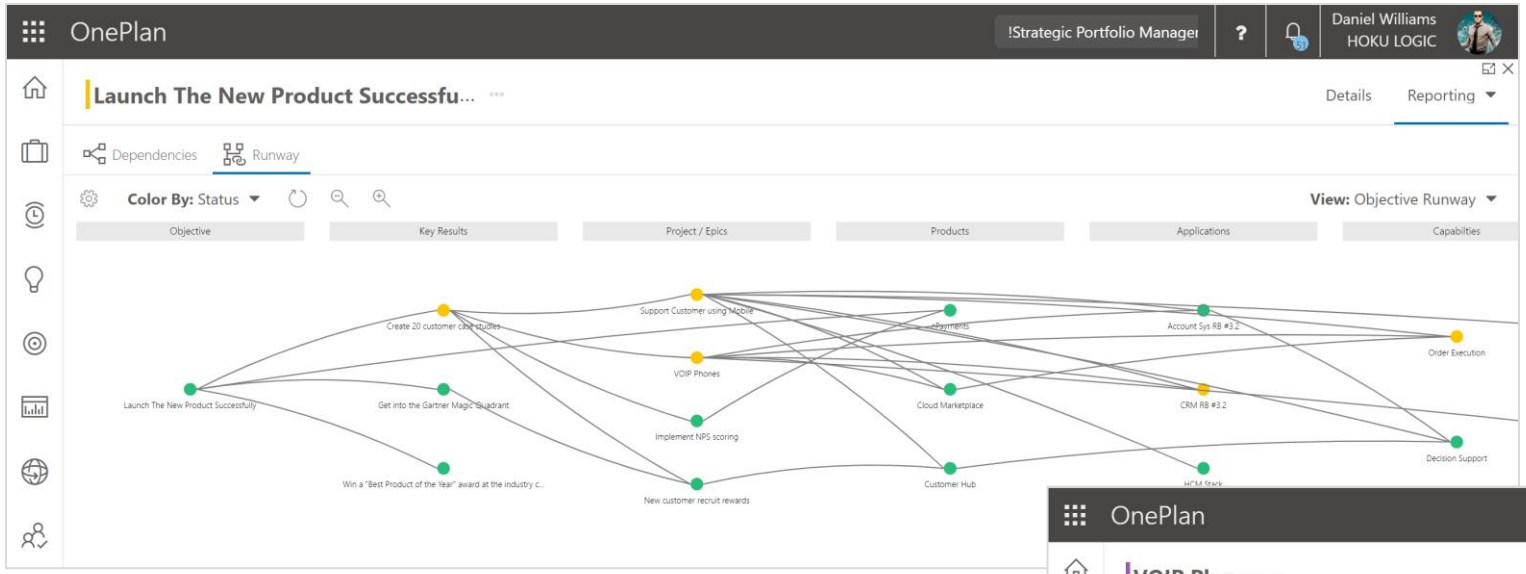


Enterprise Architecture

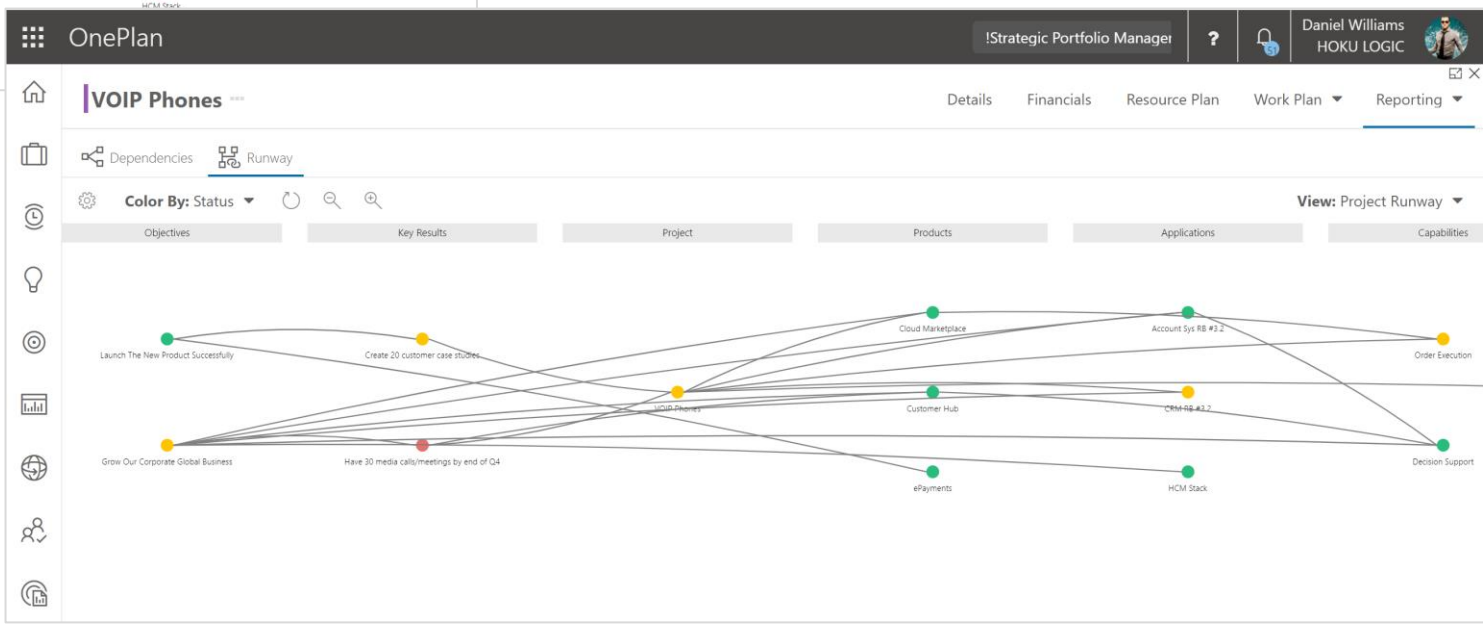


Project Portfolio

OnePlan Visualizer



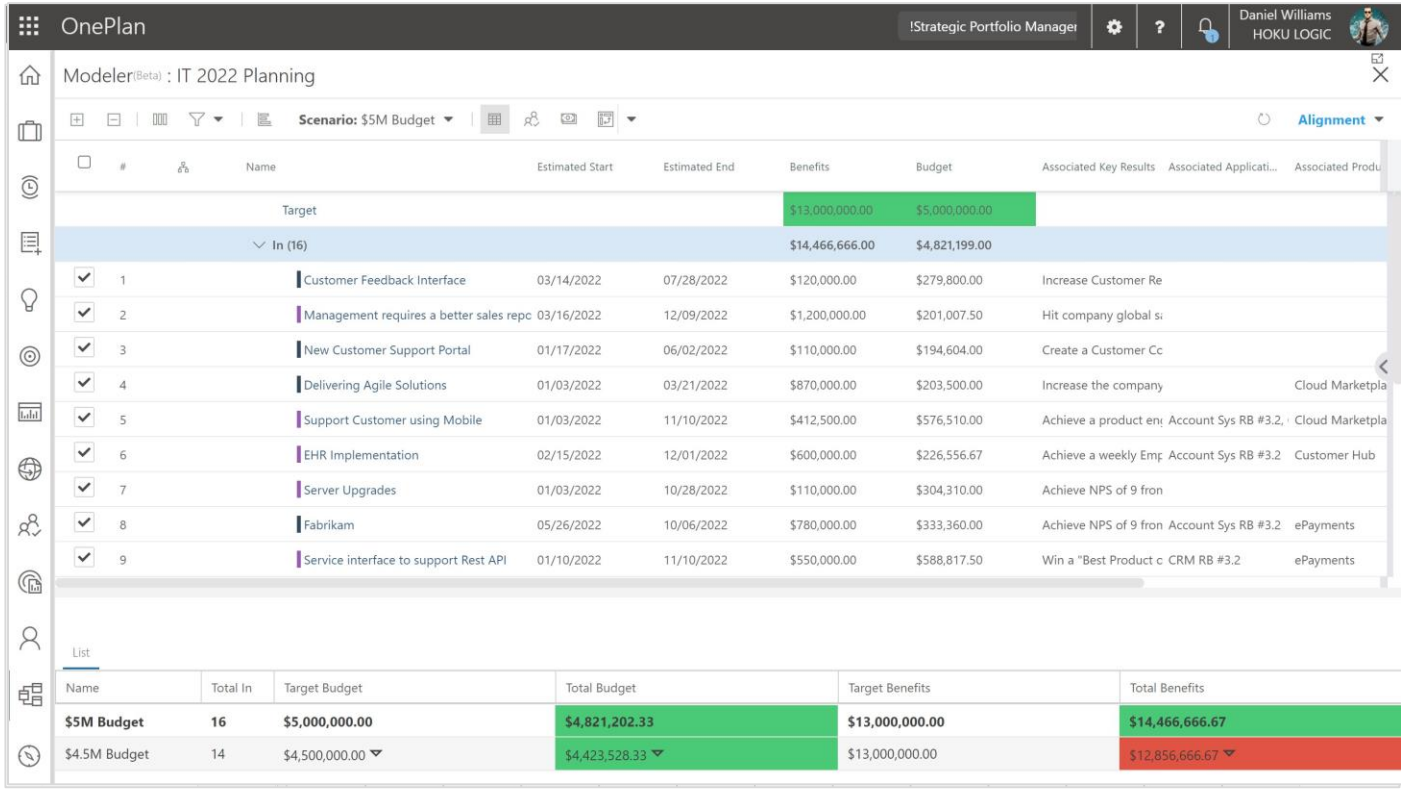
Objective Runway



Project Runway

OnePlan Modeler

- Capture and save different scenario models
- Models for specific business units, departments, etc.
- Apply constraints and targets for cost, benefits, etc.
- Views of initiatives that are in/out
- Comparison of scenarios

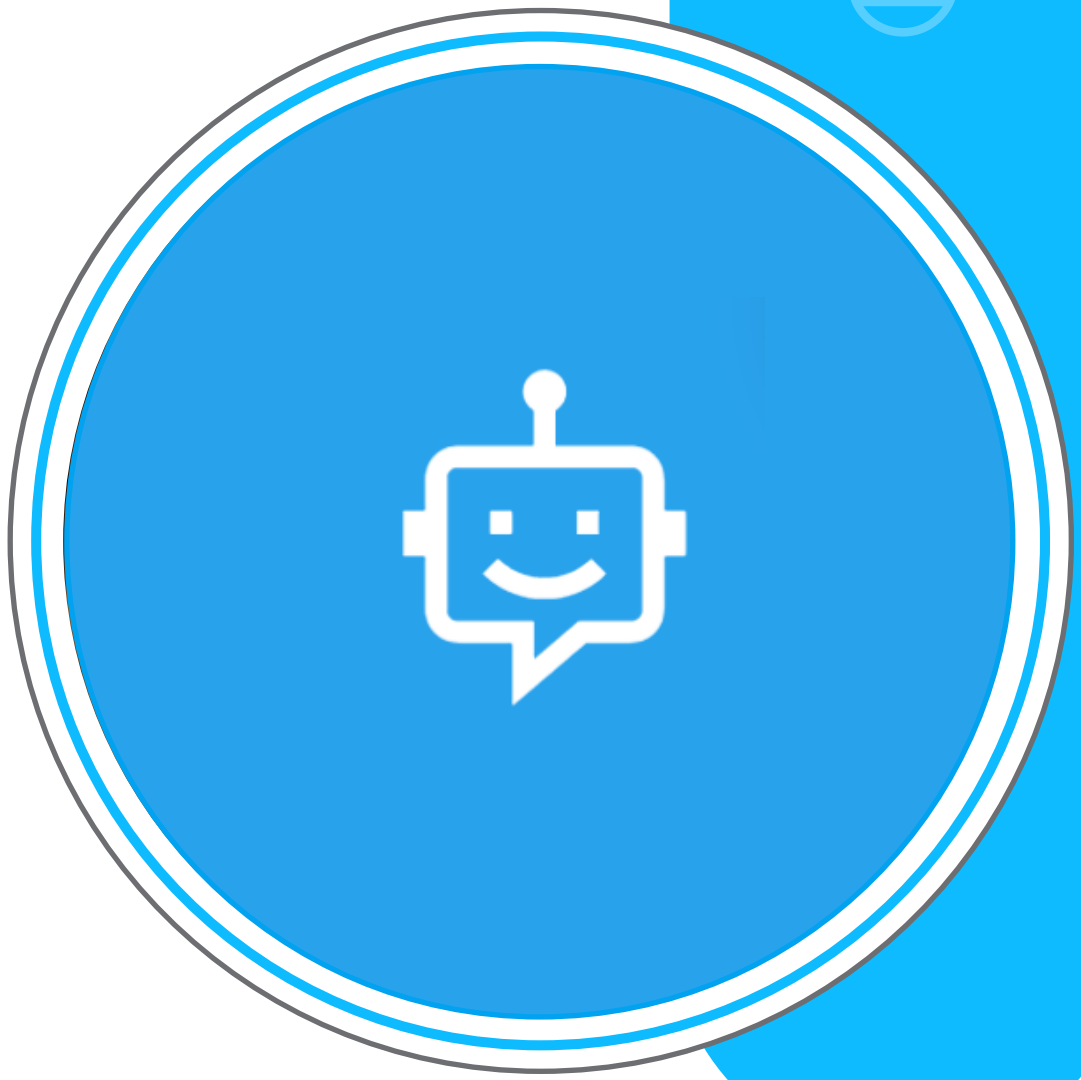


What-if Scenario Modeling

Say Hello to OnePlan's Sofia GPT

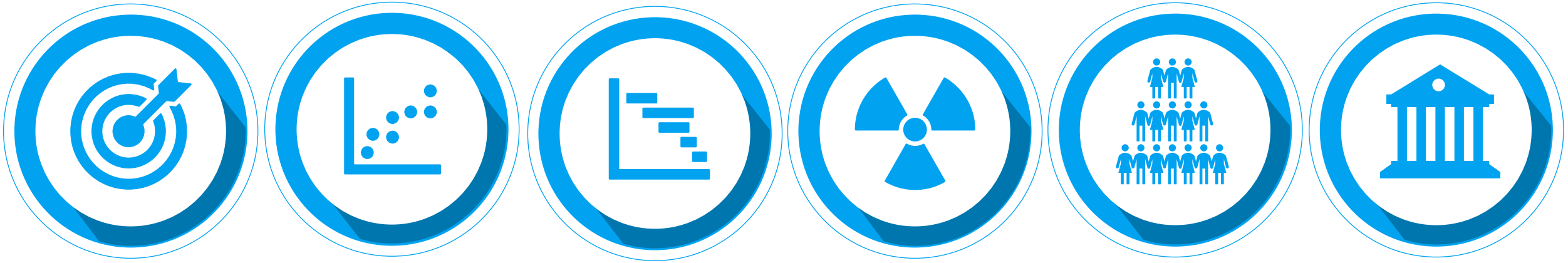
"AI as a Collaborator"
The Revolutionary New Language Model for Strategic Portfolio and Work Management

- OnePlan's Sofia GPT is an advanced Azure OpenAI GPT (Generative Pre-trained Transformer) module developed by OnePlan to revolutionize the way people and business manage their strategic portfolio and work
- OnePlan's Sofia GPT can understand natural language and responds in real-time, making it an invaluable assets for anyone looking to streamline their strategic planning and decision-making process
- OnePlan's Sofia GPT can leverage data not only from OpenAI's large network of data sources but also from OnePlan itself
- OnePlan's Sophia GPT automates several tedious and time-consuming tasks. Data entry, Information retrieval, Communications, Estimating, Identifying, Finding Data Anomalies, and much more.



OpenAI | Microsoft | OnePlan

Sample Use Cases for AI in Strategic Portfolio Management



Strategic Planning

OnePlan's Sofia GPT helps organizations make data-driven decisions and forecast outcomes.

Portfolio Optimization

OnePlan's Sofia GPT helps organizations balance their portfolio of projects to maximize value.

Work Management

OnePlan's Sofia GPT helps organizations manage resources, tasks, and timelines more efficiently.

Risk Assessment

OnePlan's Sofia GPT helps organizations identify and mitigate potential risks to their projects and portfolios.

Resource Allocation

OnePlan's Sofia GPT helps organizations optimize resource allocation across projects and teams.

Investment Forecasting

OnePlan's Sofia GPT helps organizations manage project costs, budgets, and forecasts.

Demonstration

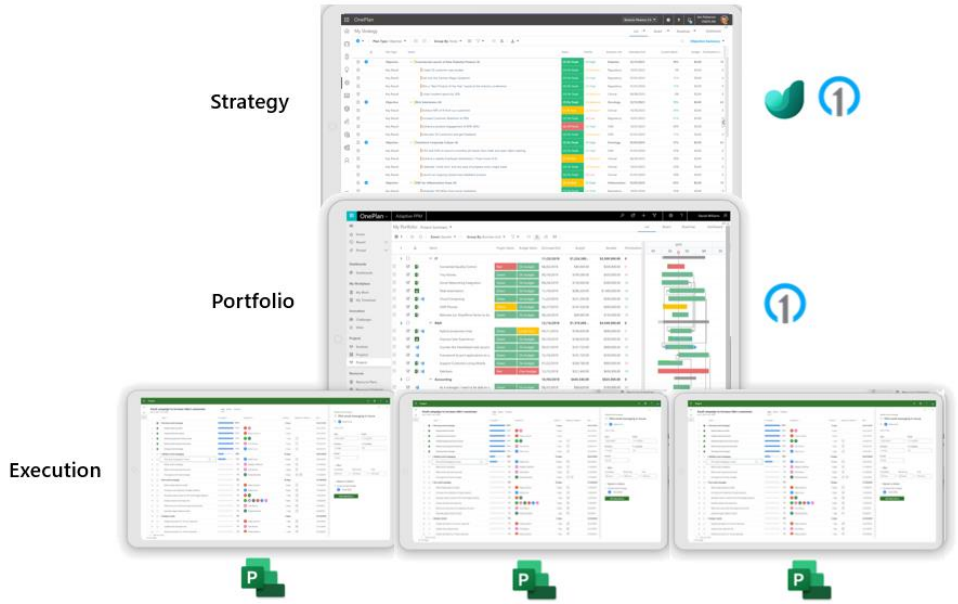
Summary & Next Steps

Summary

- Microsoft is in the process of reimagining Project and Project Online
- Project for the web provides new, modern, project execution and scheduling
- Project for the web does not have full feature parity with Project Online
- OnePlan provides a platform that extends Project for the web, and goes beyond the capabilities of Project Online
- OnePlan also adds Strategic Portfolio Management capabilities
- OnePlan integrates with other solutions/tools as needed
- OnePlan provides the solutions, services, migration and support to ensure customer transition, value and success

OnePlan + Project for the web

A Modern Solution That Extends Beyond Project Online



OnePlan
Awarded Partner of the Year Again in 2022!

OnePlan Recognized by Microsoft as a **Global PPM Leader**

Project and Portfolio Management Winner

Project and Portfolio Management Finalist

Project and Portfolio Management Winner

Project and Portfolio Management Winner

Microsoft

Microsoft Gold Partner	Microsoft Gold Partner	Microsoft Gold Partner	Microsoft Gold Partner	Microsoft Gold Partner
Project & Portfolio Management	Collaboration & Content	Cloud Productivity	Cloud Platform	Data Analytics

Gartner®

OnePlan recognized in the Market Guide for Collaborative Work Management

INFO~TECH RESEARCH GROUP

OnePlan cited as a top vendor in "Determine the Future of Microsoft Project in Your Organization"

30 Most SR 2022 Reputable Companies of the Year

The SaaS Awards

WINNER 2022

Best SaaS Product for Project Management

mpug.com

From Project Online

Migration Complexity

- Understood with available tools
- Moderate change in user experience
- Complex and potential loss of functionality

Project Online

Project for the web and Power Apps

Pros
- Aligned with Microsoft Vision
- Flexible platform for addressing specific requirements
- Known license model

Cons
- Missing functionality in Project Online
- Likely requires investment in custom Apps or third-party tools to meet current functionality

Comments
Well aligned with MS vision but needs maturation.

Microsoft Dynamics 365 | Project Operations

Pros
- Robust solution for complex project delivery environments
- Built on the Dynamics platform

Cons
- Higher licensing costs
- Lacks native Project Desktop integration
- Wholesale change of resource management module

Comments
A more expensive option that may require an adoption of more functionality than needed.

From Project Online – Better Together

Migration Complexity

- Understood with available tools
- Moderate change in user experience
- Complex and potential loss of functionality

Project Online

Project for the web and Power Apps

OnePlan

Pros
- Aligned with Microsoft Vision
- Complete PPM functionality to replace Project Online
- Integrates with Project, Planner and other scheduling tools
- Integrates with Teams

Comments
Well aligned with MS vision and exceeds capabilities of Project Online while preserving the core components and user experience.

Microsoft Dynamics 365 | Project Operations

Pros
- Robust solution for complex project delivery environments
- Built on the Dynamics platform

Cons
- Higher licensing costs
- Lacks native Project Desktop integration
- Wholesale change of resource management module

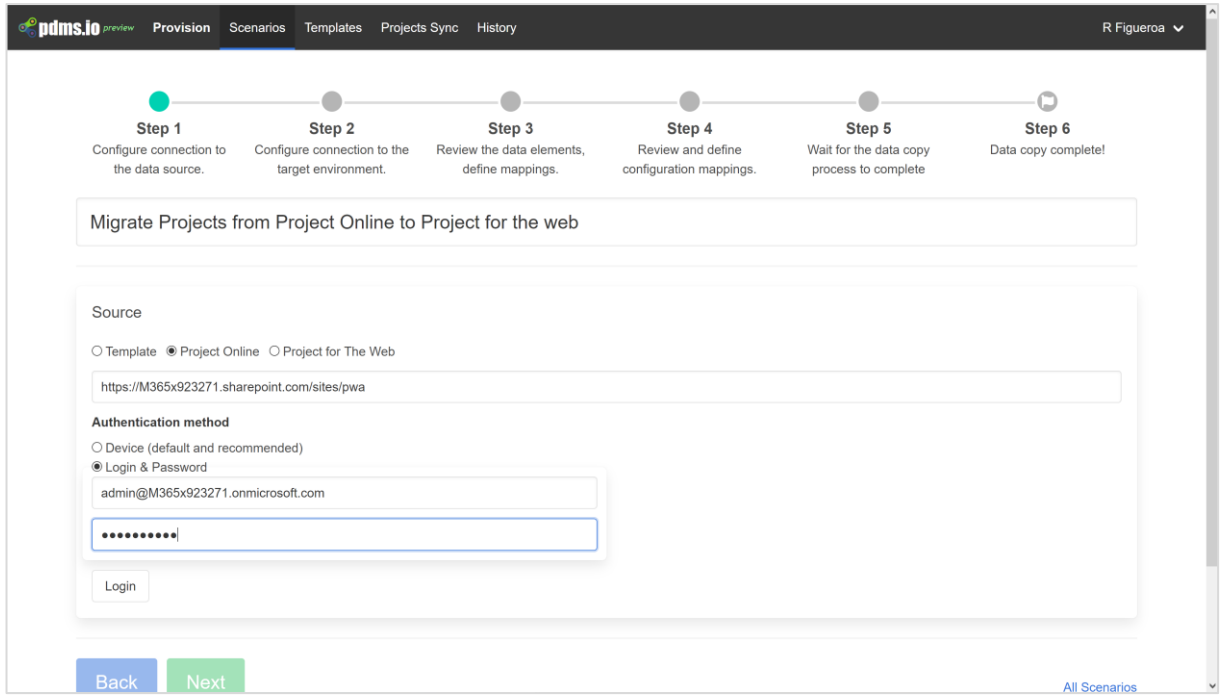
Comments
A more expensive option that may require an adoption of more functionality than needed.

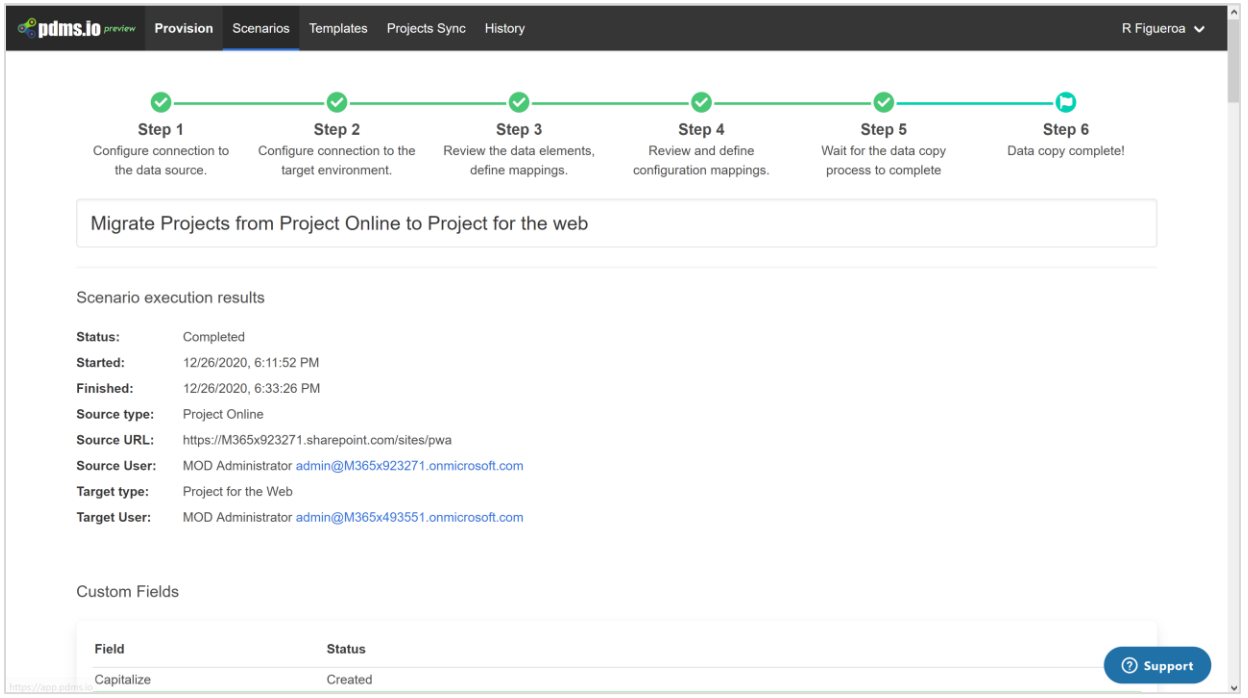
Migration Tooling from Project Online to Project Accelerator

Toolkit for Managing Project for the web, Project Power App and Project Online Data

pdms.io

(OnePlan Partner)





Migration Workshop

Workshop Agenda

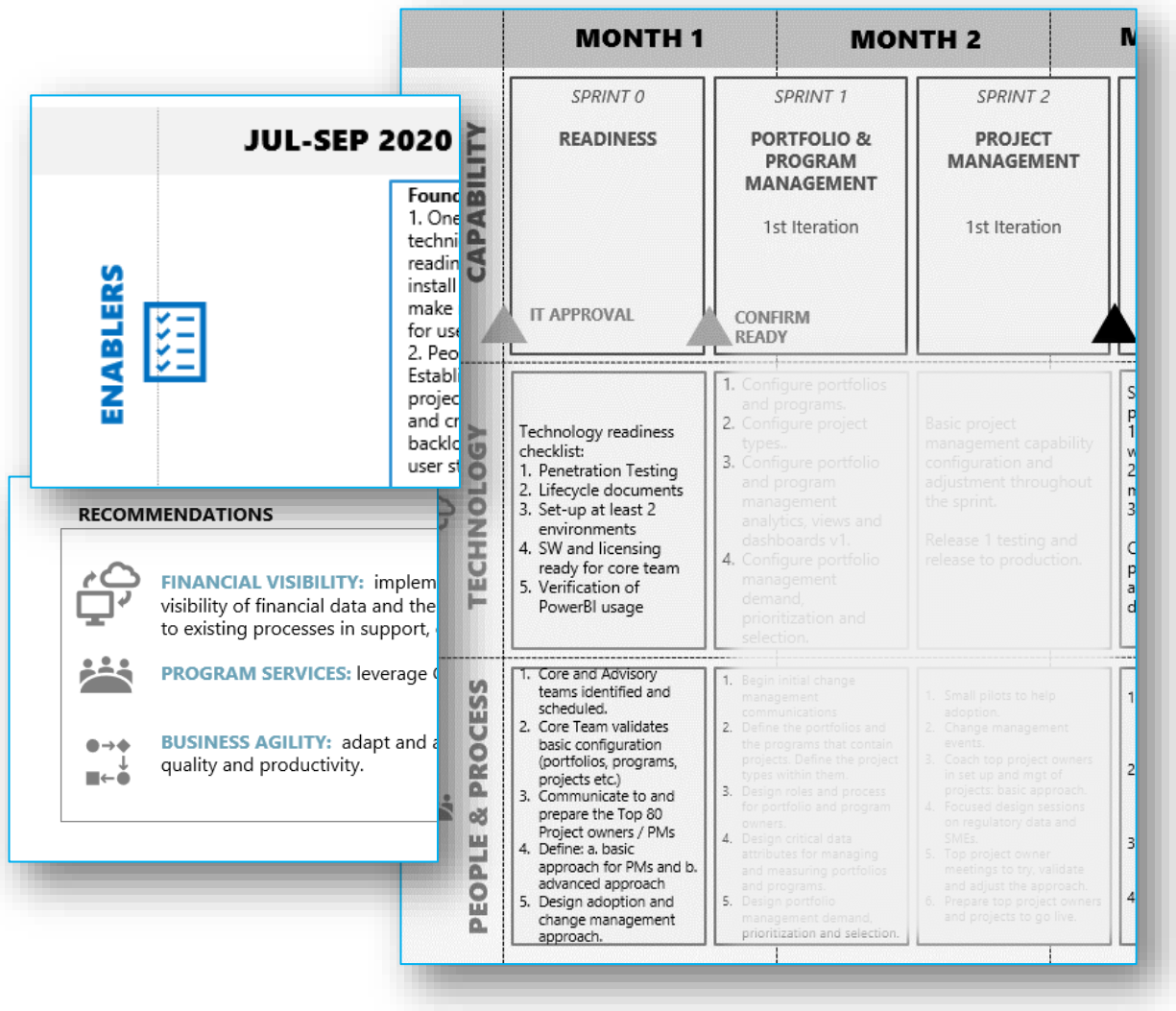
- Demonstration and discussion of the new technology options based on the Microsoft stack. Includes opportunities to leverage Microsoft Teams, Microsoft Power Platform, Project for the Web, Azure DevOps and OnePlan apps.
- Review your business objectives for portfolio and work management, including any challenges with the current state.
- Review leading practices and today's frameworks for portfolio management.
- Review of current licensing and options to optimize investments

Output

- Action plan for your current data plus technology configurations requiring migration.
- Customized recommendations and roadmap documentation after the workshops.

Details

- 8 hours in total, divided into 3 sessions.
- Up to 8 people from your organization.



Our Webinars

https://oneplan.ai/webinars/

OnePlan

Welcome to the OnePlan webinar center where you will find live and on-demand webinars.

Live Webinars

LIVE

November 18th, 2021 | 10:00am PST & 1:00pm EST

Strategic Planning

Have you completed a Financial Plan that aligns with your corporate strategy?

Budget Forecasting, Capital Planning, and Financial Planning – All key pain points that can make or break an organization. As this year comes to a close, many organizations are developing their annual plans. This process includes defining the goals and objectives for the organization and the key areas of investment and spending. Aligning strategy with [...]

On-Demand Webinars

ON-DEMAND

Strategic Planning

Do you have the resources needed to meet your strategic objectives & key results?

For many organizations the flipping of the calendar drives the adoption of new and updated objectives, new key initiatives and renewed investments. Meeting these

Categories

- Adaptive Portfolio
- Agile Portfolio
- Financial Management
- Professional Service Automation
- Resource Plan
- Strategic Planning
- Team Collaboration

Get Started Today! - Free Trials

Assistance available from OnePlan

https://oneplan.ai/solutions/

Available on Microsoft AppSource
www.appsource.com

OnePlan Solutions

Select a solution that you would like to learn more about and Get Started Today.

Strategic Portfolio Management

Align strategy to investments, understand impacts & model trade-offs in today's dynamic business environment.

Learn More

Get Started

Adaptive Project Portfolio Management

OnePlan allow modern organizations the flexibility to blend Waterfall and Agile projects into a single portfolio management solution.

Learn More

Get Started

Agile Portfolio Management

Adopt scaled agile portfolio management to connect people, processes and technology for speed, agility and quality.

Learn More

Coming Soon

Professional Service Automation

OnePlan's Professional Services Automation is an end-to-end solution that provides service delivery organizations a single system of engagement.

Learn More

Get Started

Product Portfolio Management

OnePlan Product Portfolio Management solution provides the tools needed to strategically plan and execute New Product Development.

Learn More

Get Started

Collaborative Work Management

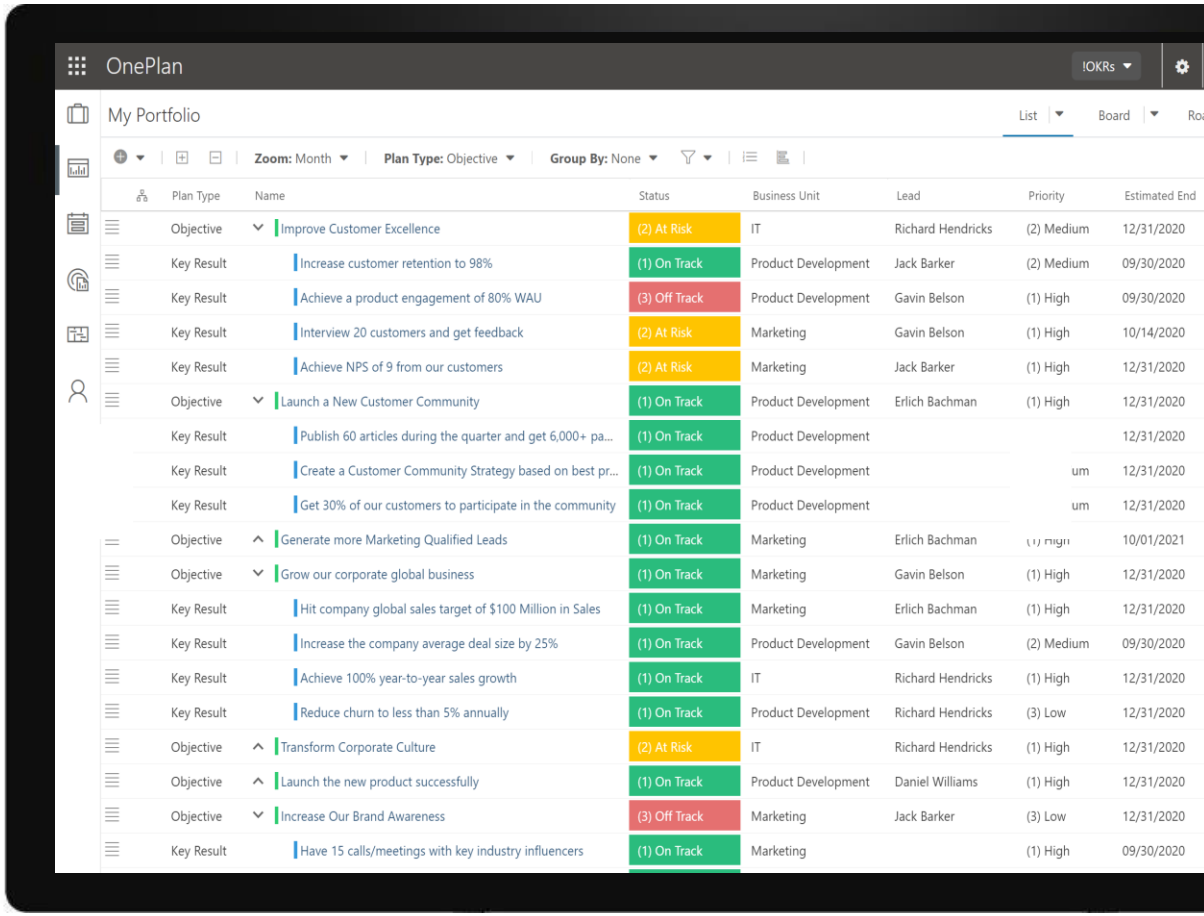
OnePlan Collaborative Work Management solution supports multiple project management approaches all within the same environment.

Learn More

Get Started

Special Offer – Free Roadmap Workshop

- Review your current use of solutions and tools
- Assess current requirements and desired future state
- Determine how to implement or migrate into the new solution
- Implementation roadmap for best adoption success
- Total cost of ownership evaluation



Plan Type	Name	Status	Business Unit	Lead	Priority	Estimated End
Objective	Improve Customer Excellence	(2) At Risk	IT	Richard Hendricks	(2) Medium	12/31/2020
Key Result	Increase customer retention to 98%	(1) On Track	Product Development	Jack Barker	(2) Medium	09/30/2020
Key Result	Achieve a product engagement of 80% WAU	(3) Off Track	Product Development	Gavin Belson	(1) High	09/30/2020
Key Result	Interview 20 customers and get feedback	(2) At Risk	Marketing	Gavin Belson	(1) High	10/14/2020
Key Result	Achieve NPS of 9 from our customers	(2) At Risk	Marketing	Jack Barker	(1) High	12/31/2020
Objective	Launch a New Customer Community	(1) On Track	Product Development	Erlich Bachman	(1) High	12/31/2020
Key Result	Publish 60 articles during the quarter and get 6,000+ pa...	(1) On Track	Product Development			12/31/2020
Key Result	Create a Customer Community Strategy based on best pr...	(1) On Track	Product Development		um	12/31/2020
Key Result	Get 30% of our customers to participate in the community	(1) On Track	Product Development		um	12/31/2020
Objective	Generate more Marketing Qualified Leads	(1) On Track	Marketing	Erlich Bachman		10/01/2021
Objective	Grow our corporate global business	(1) On Track	Marketing	Gavin Belson	(1) High	12/31/2020
Key Result	Hit company global sales target of $100 Million in Sales	(1) On Track	Marketing	Erlich Bachman	(1) High	12/31/2020
Key Result	Increase the company average deal size by 25%	(1) On Track	Product Development	Gavin Belson	(2) Medium	09/30/2020
Key Result	Achieve 100% year-to-year sales growth	(1) On Track	IT	Richard Hendricks	(1) High	12/31/2020
Key Result	Reduce churn to less than 5% annually	(1) On Track	Product Development	Richard Hendricks	(3) Low	12/31/2020
Objective	Transform Corporate Culture	(2) At Risk	IT	Richard Hendricks	(1) High	12/31/2020
Objective	Launch the new product successfully	(1) On Track	Product Development	Daniel Williams	(1) High	12/31/2020
Objective	Increase Our Brand Awareness	(3) Off Track	Marketing	Jack Barker	(3) Low	12/31/2020
Key Result	Have 15 calls/meetings with key industry influencers	(1) On Track	Marketing		(1) High	09/30/2020

Next Steps

OnePlan

- FREE – Trial
- FREE – Roadmap Workshop
- FREE – Personalized 1:1 Demo

For more information:
contact@oneplan.ai

www.oneplan.ai

Thank You!

Navigation the Future
Of Microsoft Project and Project Online

Jim Patterson, OnePlan Solutions
jpatterson@oneplan.ai
www.oneplan.ai

OnePlan

Jim Patterson
Strategic Portfolio Management Solutions