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Navigation the Future Of Microsoft Project and Project Online

May 31, 2023 @ 12pm-1pm EST

Jim Patterson, OnePlan Solutions

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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 ...but it's chaotic, always happening We believe collaboration is critical... 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... ...but it's a mess and our reporting is manual We want to use our data effectively... We need to make better decisions... ...but no one has the big picture



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Microsoft's Future Vision

- Microsoft announced a plan to reimagine 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

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Dynamics 365 and Project Operations mpug.com



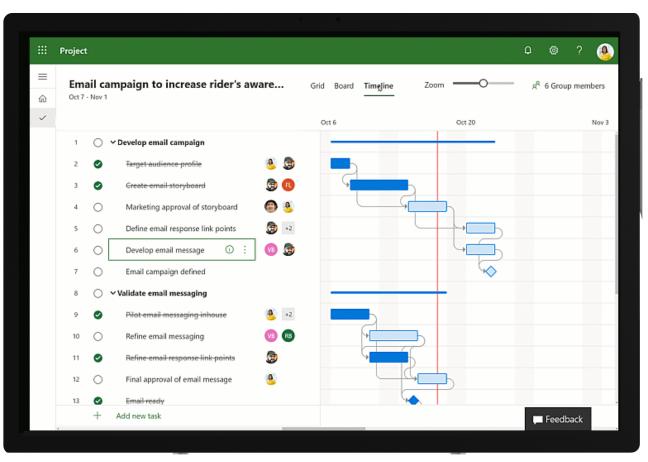
Presh new experience

Microsoft Project

Simple & powerful project



Innovation platform

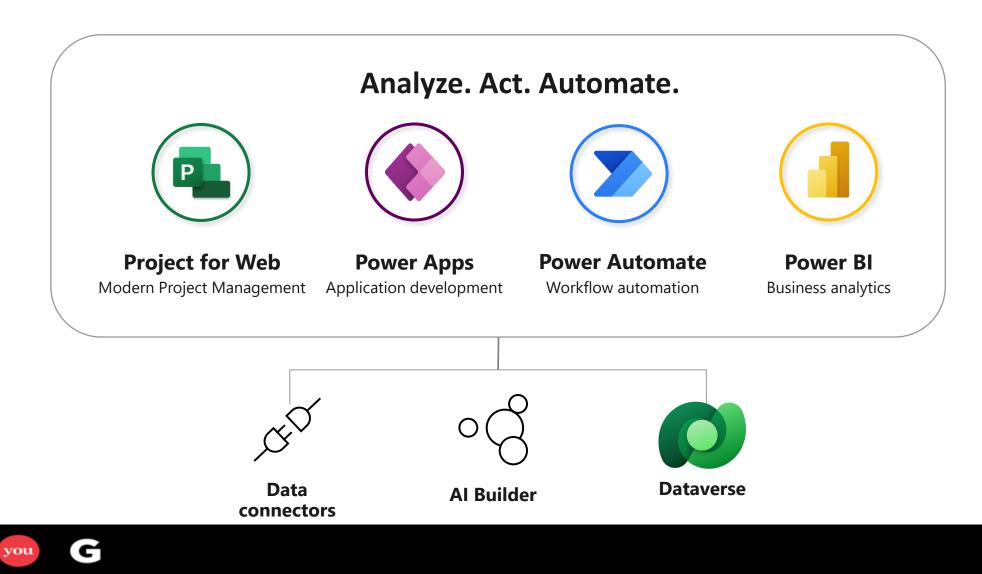






New Microsoft PPM built on the Power Platform

One <u>low-code</u> 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





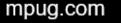
Uses Teams for Content and Collaboration

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

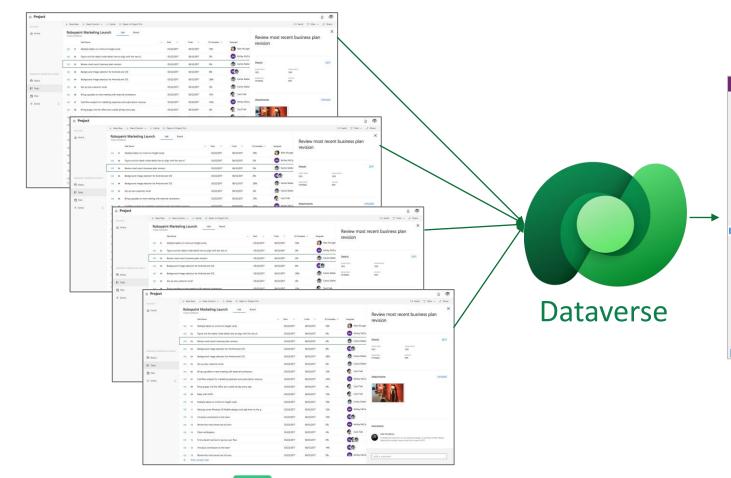
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All Projects in Dataverse – Power Apps Solutions



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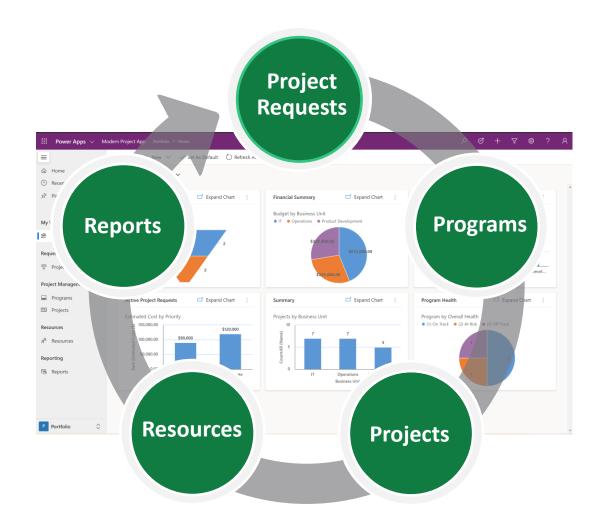


Modern Project for the web Accelerator Solution

(aka Project Accelerator, PPM Accelerator, PMO Accelerator)

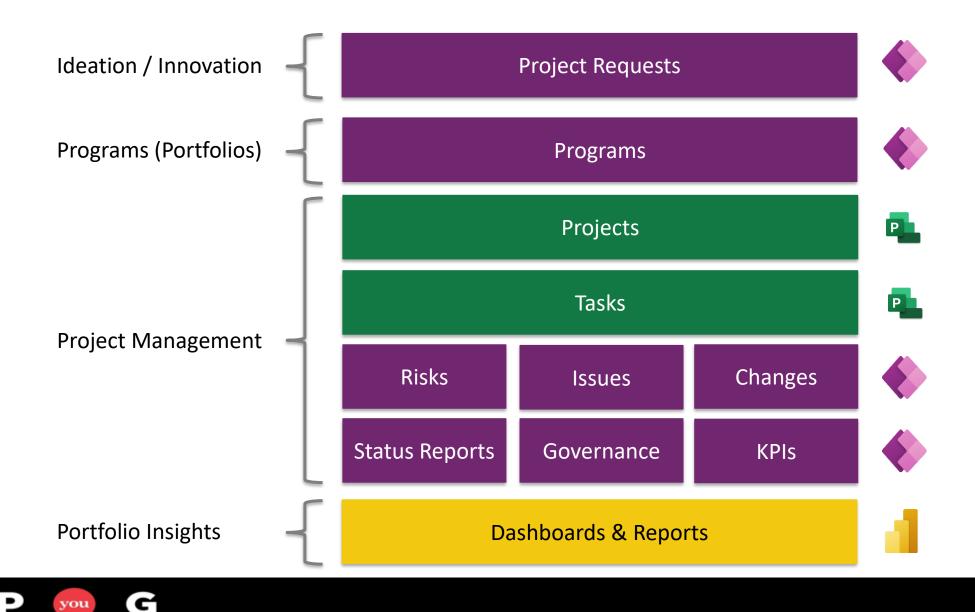
Developed for Microsoft by OnePlan

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



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Demand Management

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Ideation & Project Requests



Program Management

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Program Management



Project Management

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Risk Management

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Issue Management

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Change Management

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Project Intelligence

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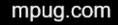
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Accelerator Report Pack

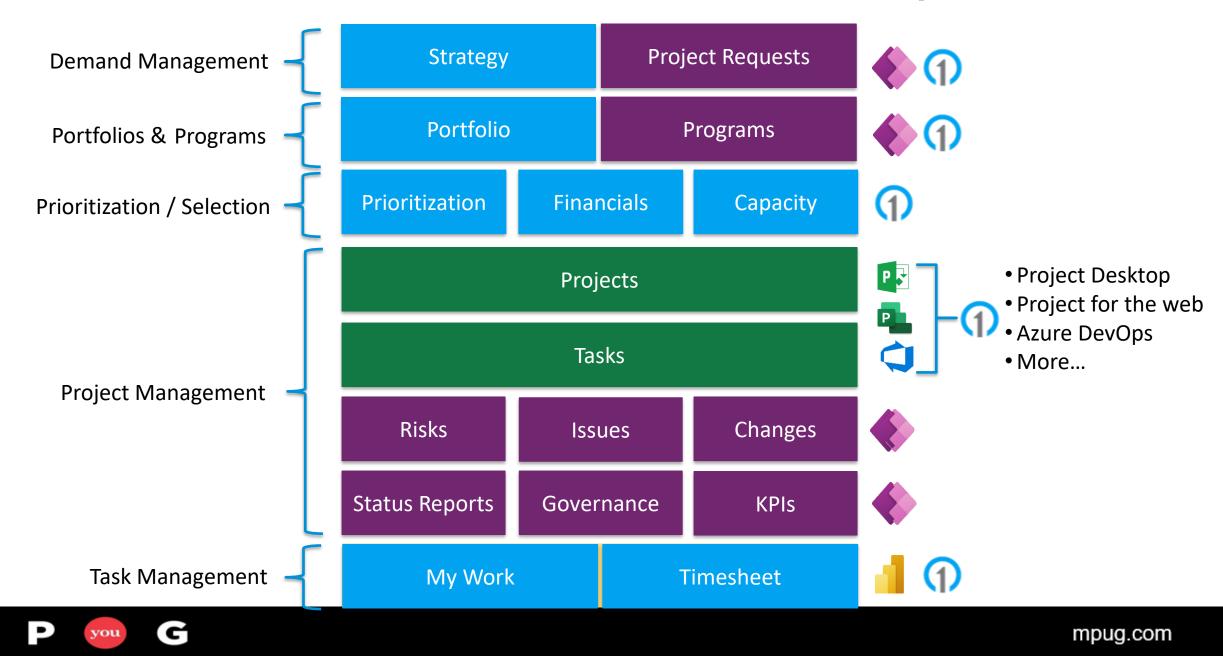


Critical Capabilities for Project Portfolio Management

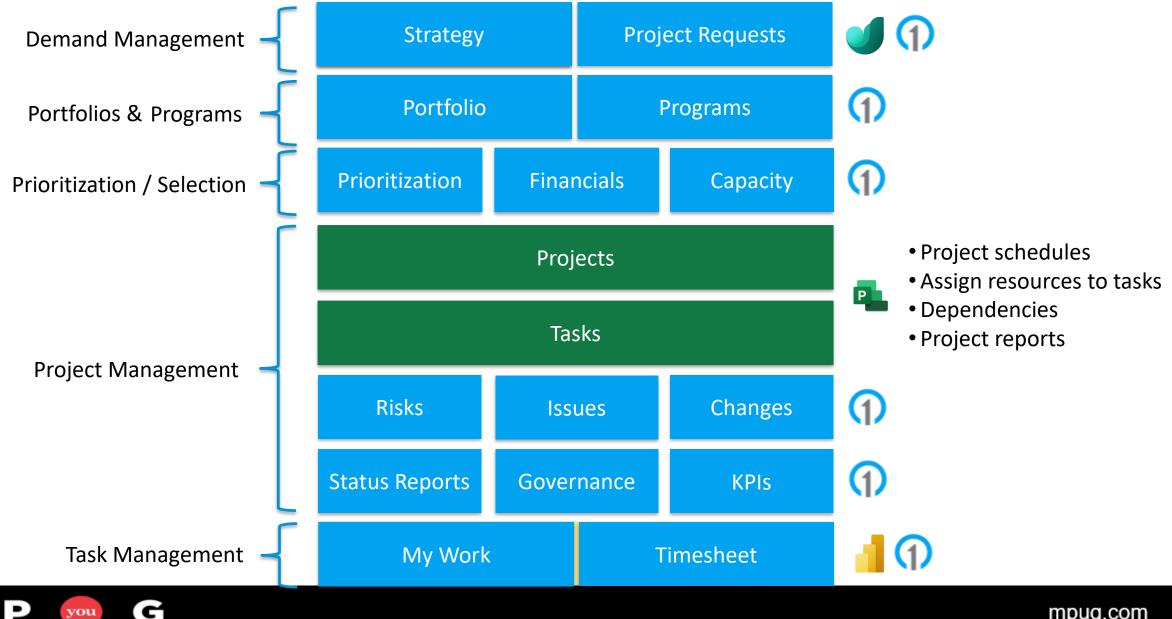
Project Demand Management	Project Planning and Management	Time Management
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OnePlan Extends Accelerator to Achieve Full Adaptive PPM

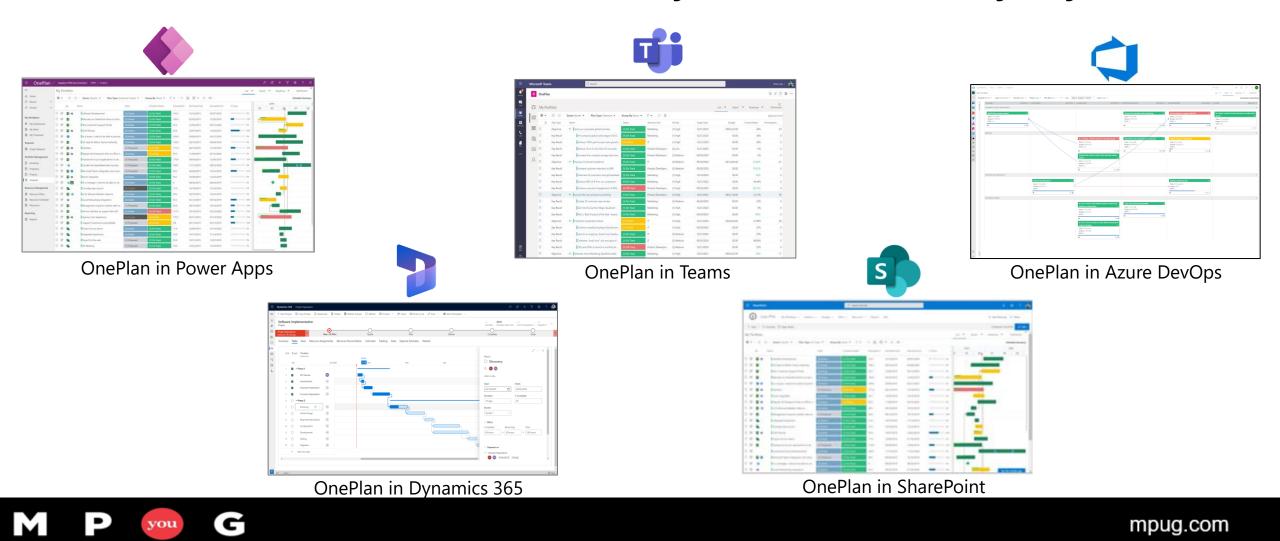


OnePlan Platform Adds Complete Strategic Portfolio Management



OnePlan

Fused into the tools that you work in everyday.

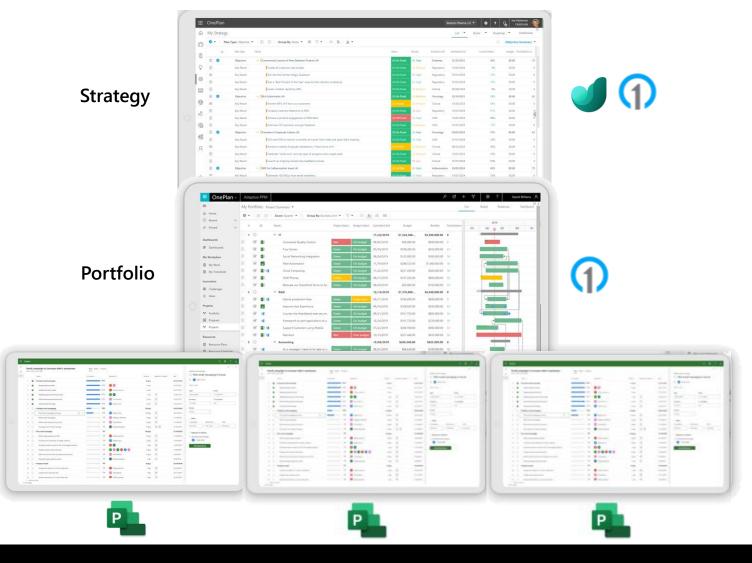


Comprehensive Solution for the Microsoft Cloud

Execution

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Connecting Strategy to Execution





Portfolio Visibility Across All Work

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]	for Metro Transit Authority	(2) Active	(1) On Track	148.2	09/16/2019	04/09/2020		0%	Q2	Q5		40	QI	Q2	
	g		our SharePoint farms to Azur	(2) Active	(1) On Track	140.4	05/20/2019	12/02/2019	_	23%	->	_					
	2		ork to port applications to all	(1) Proposed	(1) On Track	176.0	04/04/2019	12/06/2019	_	35%				1			
			the Heartbleed web security	(1) Proposed	(1) On Track	194.7	11/12/2019	08/10/2020		0%				1	••		-
≣	ΡŞ		/ App Launch	(3) Closed	(1) On Track	37.0	10/18/2019	12/10/2019		0%				1			
≣			etworking Integration	(2) Active	(1) On Track	92.3	05/13/2019	09/18/2019		40%	-	_					
≣	PS	- Tiji	ment requires a better sales re	(1) Proposed	(1) On Track	42.0	08/15/2019	10/14/2019		28%		r)					
			nterface to support Rest API	(2) Active	(3) Off Track	117.3	10/14/2019	03/25/2020		29%							
≣	a	<u></u>	ervice demo	(2) Active	(1) On Track	71.9	10/09/2019	01/16/2020		0%							
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≣	-		or the web	(1) Proposed	(1) On Track	35.0	10/21/2019	12/07/2019		0%							
≣	P		ting	(1) Proposed	(1) On Track	35.0	10/22/2019	12/10/2019		0%				1			
≣			Launch	(1) Proposed	(1) On Track	76.0	10/26/2019	02/11/2020		0%				T			
	ΡŞ	ি ব	s Migration	(1) Proposed	(1) On Track	39.0	10/31/2019	12/25/2019		0%				1			
			ones	(2) Active	(1) On Track	43.4	10/07/2019	12/05/2019		62%			-				
\equiv	- Liji		Development	(2) Active	(1) On Track	103.1	12/16/2019	05/07/2020		0%							
≣			1	(1) Proposed	(2) At Risk	177.4	04/15/2019	12/18/2019	-	32%							
≣	P	1	all Sharepoint Sites to Office 3	(2) Active	(2) At Risk	95.3	11/04/2019	03/16/2020		0%				IT.			
≣	1 2	1	t Teams Integration and mess	(1) Proposed	(1) On Track	96.2	06/04/2019	10/16/2019		41%							
		-	pgrades	(2) Active	(1) On Track	56.1	10/04/2019	12/23/2019		0%				1			
≣	P		hager, I need to be able to vie	(2) Active	(1) On Track	0	08/26/2019	08/26/2019		0%		4	•				
			mote Weather Stations	(2) Active	(1) On Track	28.3	09/16/2019	10/25/2019		0%			_	-			

Deliver More Strategic Value

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

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Portfolio Prioritization

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*	÷ #	t		Ê.	Name	State	Strategic Alignment	Lower Cost	Improve Employee R	Risk	Prioritizat.		B	udget	Benef	fits
Ô	1		V	P 🕄 📫	VOIP Phones	(2) Active	Strong	Extreme	Moderate	Strong	6	8.75	\$46	7,041.00	\$	15.00
Ô	2		V	2 📫	Software Development	(2) Active	Strong	Not Rated	Moderate	Low	5	6.25	\$31	3,060.00	\$800,1	29.00
B	3	=	8	PS	iOS App for Metro Transit Authority	(2) Active	Low	Extreme	Strong	Moderate	6	8.75	\$61	4,300.00	\$	15.00
Ð	4	=	8	P 5	New Customer Support Portal	(2) Active	Extreme	Moderate	Low	None	6	8.75	\$7	7,000.00	\$	15.00
e e	5		V	P 3	Relocate our SharePoint farms to Azur	(2) Active	Moderate	Strong	Moderate	Low	6	8.75	\$54	5,800.00	\$	15.00
c>	6	=	8	\$	As a buyer, I need to be able to purcha	(2) Active	Strong	Moderate	Extreme	Moderate		75	\$15	0,000.00	\$	15.00
ŝ	7		8	2 🔹	Fabrikam	(1) Proposed	Low	Strong	Strong	Low	6	8.75	\$28	0,680.00	\$	15.00
Ô	8	=	2	23 📫	Migrate all Sharepoint Sites to Office 3	(2) Active	Strong	Low	Low	Strong	4	3.75	\$20	2,720.00	\$	15.00
Ô	9	=	1	P	Framework to port applications to all	(1) Proposed	Strong	Extreme	Low	Strong		62.5	\$57	0,240.00	\$	15.00
Ô	10		8		Ecommerce Portal Developmemt	(2) Active	Not Rating	Not Rated	Extreme	Not Rated		25	\$1,20	0,000.00	\$	15.00
	11	=	Ø	হ	Counter the Heartbleed web security	(1) Proposed	Moderate	Extreme	Strong	Strong	e	8.75	\$21	3,000.00	\$	15.00
	12	=	8	😰 💠	Microsoft Teams Integration and mess	(1) Proposed	Moderate	Moderate	Strong	Moderate		62.5	\$46	7,800.00	\$	15.00
	13		2	23 🤹	Server Upgrades	(2) Active	None	Low	Strong	None		50	\$15	5,360.00	\$	15.00
	14		V	ية 🕑	As a manager, I need to be able to vie	(2) Active	Extreme	Moderate	Moderate	Strong		62.5	\$34	0,000.00	\$	15.00
	15		V	e .	Thursday App Launch	(3) Closed	Not Rating	Not Rated	Not Rated	Not Rated		0	\$5	2,520.00	\$250,0	00.00
	16		Ø	2 🥑	Ai for Remote Weather Stations	(2) Active	Strong	Extreme	Low	Low		75	\$17	1,441.00	\$	15.00
	17	=	V	49	Social Networking Integration	(2) Active	Extreme	Low	Moderate	Moderate		62.5	\$14	2,600.00	\$1,300,0	10.00
	18		V	P 5	Management requires a better sales re	(1) Proposed	Low	Low	Strong	Strong	4	3.75	\$28	2,640.00	\$	15.00
	19	=	V	PS	Service interface to support Rest API	(2) Active	Strong	Moderate	Moderate	Strong	5	6.25	\$75	5,385.00	\$	15.00
	20		V		Enhance buying experience	(2) Active	Not Rating	Not Rated	Not Rated	Not Rated		0	\$70	0,000.00	\$1,200,0	00.00
	21	=	8		Migrate to Azure	(1) Proposed	Not Rating	Not Rated	Not Rated	Not Rated		0	\$25	0,000.00		\$0.00
	22	=	V		The Box III	(1) Proposed	Moderate	Moderate	Low	Strong	4	3.75	\$80	0,000.00	\$	15.00
	23	=	R	2 a 🖬	Improve Liser Experience	(3) Closed	Fytreme	Moderate	Strong	Moderate		75	\$50	5 320 00	٢	15 00

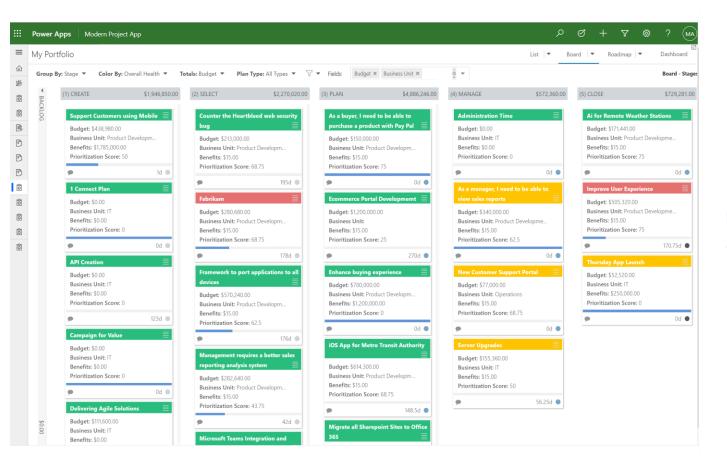
Deliver More Strategic Value

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



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Portfolio Kanban Boards (PI Planning)



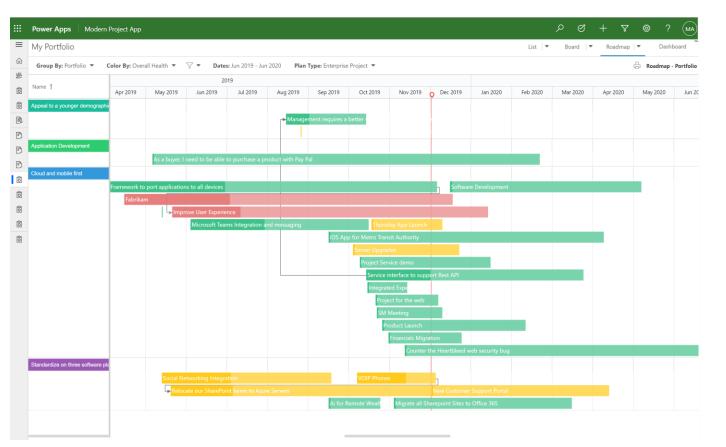
Deliver More Strategic Value

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





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

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	8	Į.	Name		Туре	State	Status	Estimated End	Budget	Benefits	Bucket	Program Increment
=			Appea	l to a younger demographic	Portfolio	(2) Active	At Risk	09/21/2020	\$166,947.00	\$641,556.00		
\equiv		8	Cloud	and mobile first	Portfolio	(2) Active	On Track	04/17/2020	\$688,444.00	\$3,879,000.00	(5) Implementing	PI 2 2020
≣		V	Ƴ Fai	orikam	Value Stream	(2) Active	On Track	04/17/2020	\$688,444.00	\$3,879,000.00		PI 2 2020
≣	46	V	~	Framework to port applications	Epic	(2) Active	On Track	11/09/2019	\$78,900.00	\$89,000.00	(4) Portfolio Backlog	PI 4 2020
≣	49	V	^	World-Class customer support	Epic	(2) Active	On Track	07/24/2019	\$78,900.00	\$800,000.00	(1) Funnel	PI 2 2020
≣	46	×	~	Support Customers using Mobile	Epic	(2) Active	At Risk	08/05/2019	\$342,500.00	\$1,174,000.00	(5) Implementing	PI 2 2020
≣		Ś		Mobile Shopping Cart	Feature	(2) Active	On Track	10/31/2019	\$150,000.00	\$450,000.00	(3) Analyzing	PI 4 2020
≣		V		Text Alert	Feature	(2) Active	On Track	08/30/2019	\$24,000.00	\$48,000.00	(5) Implementing	PI 3 2020
≣		V		Mobile Account Update	Feature	(1) Proposed	On Track	11/29/2019	\$96,000.00	\$124,000.00	(5) Implementing	PI 4 2020
≣		V		Pay bill via mobile app	Feature	(2) Active	On Track	08/30/2019	\$124,000.00	\$480,000.00	(2) Reviewing	PI 3 2020
≣		V		Mobile Feedback	Feature	(1) Proposed	On Track	12/31/2019	\$36,000.00	\$72,000.00	(4) Portfolio Backlog	PI 4 2020
≣		V	~	Improve User Experience	Epic	(1) Proposed	On Track	04/17/2020	\$65,387.00	\$346,000.00	(2) Reviewing	PI 3 2020
≣	49	V	~	Service interface to support Re	Epic	(2) Active	Off Track	11/29/2019	\$89,084.00	\$800,000.00	(5) Implementing	PI 2 2020
≣		V	^	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
≣		8	✓ Standa	ardize on three software platforms	Portfolio	(2) Active	On Track	10/28/2019	\$57,753.00	\$4,290,000.00		
≣		V	Ƴ ∎Up	grades and Migrations	Value Stream	(2) Active	On Track	10/28/2019	\$1,827,932	\$4,290,000.00		
≣		V	I	VOIP Phones	Project	(2) Active	On Track	10/28/2019	\$450,000.00	\$1,200,000.00	(4) Portfolio Backlog	
=		V	1	Social Networking Integration	Project	(1) Proposed	On Track	09/27/2019	\$530,000.00	\$1,200,000.00	(1) Funnel	PI 4 2020
\equiv		8	1	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.





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.

	Pow	ver /	Apps	Modern Project App										ېر		+ 7	
=	\oplus	RR		% 🔻 Committed 🔻	Dates: Jun 2019	– May 2020	7 • 8 •	20									
ົລ				D	Totals	Jun 2019	Jul 2019	Aug 2019	Sep 2019	Oct 2019	Nov 2019	Dec 2019	Jan 2020	Feb 2020	Mar 2020	Apr 2020	May 2020
<u>.</u>				Resource	Committed	Committ	Committ	Committ	Committ	Committ	Committ	Committ	Committ	Committ	Committ	Committ	Committ
6			8	▼ Adam Barr		31.25	27.17	28.41	29.76	27.17	29.76	72.73	78.26	31.25	28.41	28.41	29.
3		•	13	VOIP Phones	37.12	31.25	27.17	28.41	29.76	27.17	29.76	72.73	78.26	31.25	28.41	28.41	29
3			8	 Adam Noshimuri 		36.36	36.36	36.36	36.36	36.36	36.36	50.00	48.42	83.64	104.55	107.28	132
3		۲	133	Framework to port applicat	45.63	36.36	36.36	36.36	36.36	36.36	36.36	36.36	34.78	70.00	63.64	63.64	63
5		•	11	Migrate all Sharepoint Sites	7.26							13.64	13.64	13.64	13.64	13.64	19
5		۰	13	Server Upgrades	8.88										27.27	30.00	50
1			8	Amy Cornelli			43.48	59.09	50.00	65.22	80.95	13.64	32.61	100.00	213.64	222.73	142
ත් -			Å	Business Analyst		55.00	47.83	50.00	100.00	146.20	111.31	115.34	240.22	221.25	96.59	96.59	53
8			8	Daniel Williams		47.19	49.73	24.72	103.27	375.82	751.49	346.31	96.11	85.52	77.75	123.20	81
- 1			Å	Developer		50.00	70.43	114.55	158.10	208.70	433.33	709.09	833.70	568.75	221.59	245.64	500
9 8			Å	Erwin Zischka		27.19	23.64	24.72	29.76	113.86	113.99	347.44	184.51	187.19	138.35	42.90	102
2			8	Grace Williams		30.00	77.72	185.80	56.55	147.83	213.69	126.70	129.89	74.38	76.70	49.43	51
			Å	Hatim Aiad		48.94	42.55	44.49	46.61	77.34	170.42	112.67	133.86	48.94	44.49	44.49	46
			8	Kono Kalakaua		100.00	204.35	254.55	39.29	270.11	609.52	196.02	48.37	15.63	14.20	14.20	14
			Å	Lisa Andrews			34.78	54.55	114.29	34.78	38.10			100.00	31.82	36.36	38
			8	Lori Weston		110.00	160.87	157.95	79.76	52.17						54.55	38
			Å	Patrick Sands			34.78	54.55	57.14	121.74	33.33	204.55	226.09	40.00			38
			Å	Project Manager		290.00	104.35	100.00	236.90	169.20	159.13	175.76	107.61	25.00	38.64	52.27	25
			8	Sophia King		70.00	60.87		66.67	60.87	57.14	63.64					
			8	Steve Masters		33.33	28.98	30.30	31.74	28.98	31.74	30.30	28.99	33.33	30.30		
			Å	Support		50.00	65.22	148.86	32.14			72.73	226.09	61.25	49.43	30.68	
			8	▶ Wo Fat		75.00	86.96	68.18	123.81	165.22	104.76	44.32	34.78	75.00	95.45	68.18	
			Å	Yukari Kemmotsu		15.00	13.04	13.64	14.29	13.04	52.38	36.36	182.61	185.00	72.73		



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.

Ð	-8 1	az y I	Committed 🔻	Dates: Jun 2019	- May 2020	V . 8 .	8.									
	X. I	20 ¥	Committee +	Totals	Jun 2019	Jul 2019	Aug 2019	Sep 2019	Oct 2019	Nov 2019	Dec 2019	Jan 2020	Feb 2020	Mar 2020	Apr 2020	May 2020
		Resource		Committed	Committ	Committ	Committ	Committ	Committ	Committ	Committ	Committ	Committ	Committ	Committ	Committ
	8	▼ Adam	Barr	committee	31.25	27.17	28.41	29.76	27.17	29.76	72.73	78.26	31.25	28.41	28.41	29.
	• 13	VOIP F		37.12	31.25	27.17	28.41	29.76	27.17	29.76	72.73	78.26	31.25	28.41	28.41	29.
	8	▼ Adam	Noshimuri		36.36	36.36	36.36	36.36	36.36	36.36	50.00	48.42	83.64	104.55	107.28	132
	 E 	Frame	work to port applicat	45.63	36.36	36.36	36.36	36.36	36.36	36.36	36.36	34.78	70.00	63.64	63.64	63
		Migrat	e all Sharepoint Sites	7.26							13.64	13.64	13.64	13.64	13.64	19
	Proposed	Server	Upgrades	8.88										27.27	30.00	50
	Committe	d Amy C	ornelli			43.48	59.09	50.00	65.22	80.95	13.64	32.61	100.00	213.64	222.73	142
	Ŕ	▶ Busine	ess Analyst		55.00	47.83	50.00	100.00	146.20	111.31	115.34	240.22	221.25	96.59	96.59	53.
	8	Danie	Williams		47.19	49.73	24.72	103.27	375.82	751.49	346.31	96.11	85.52	77.75	123.20	81.
	Ŕ	Development	oper		50.00	70.43	114.55	158.10	208.70	433.33	709.09	833.70	568.75	221.59	245.64	500.
	ķ	▶ Erwin	Zischka		27.19	23.64	24.72	29.76	113.86	113.99	347.44	184.51	187.19	138.35	42.90	102
	R	Grace	Williams		30.00	77.72	185.80	56.55	147.83	213.69	126.70	129.89	74.38	76.70	49.43	51.
	点	▶ Hatim	Aiad		48.94	42.55	44.49	46.61	77.34	170.42	112.67	133.86	48.94	44.49	44.49	46.
	R	Kono	Kalakaua		100.00	204.35	254.55	39.29	270.11	609.52	196.02	48.37	15.63	14.20	14.20	14.
	点	▶ Lisa A	ndrews			34.78	54.55	114.29	34.78	38.10			100.00	31.82	36.36	38.
	R	▶ Lori W	leston		110.00	160.87	157.95	79.76	52.17						54.55	38.
	点	Patric	k Sands			34.78	54.55	57.14	121.74	33.33	204.55	226.09	40.00			38.
	Å	Project	t Manager		290.00	104.35	100.00	236.90	169.20	159.13	175.76	107.61	25.00	38.64	52.27	25.
	R	Sophia	a King		70.00	60.87		66.67	60.87	57.14	63.64					
	R	Steve	Masters		33.33	28.98	30.30	31.74	28.98	31.74	30.30	28.99	33.33	30.30		
	点	Support	rt		50.00	65.22	148.86	32.14			72.73	226.09	61.25	49.43	30.68	
	R	▶ Wo Fa	t		75.00	86.96	68.18	123.81	165.22	104.76	44.32	34.78	75.00	95.45	68.18	
	¢	▶ Yukari	Kemmotsu		15.00	13.04	13.64	14.29	13.04	52.38	36.36	182.61	185.00	72.73		

Resource Negotiation



Resource Prioritization

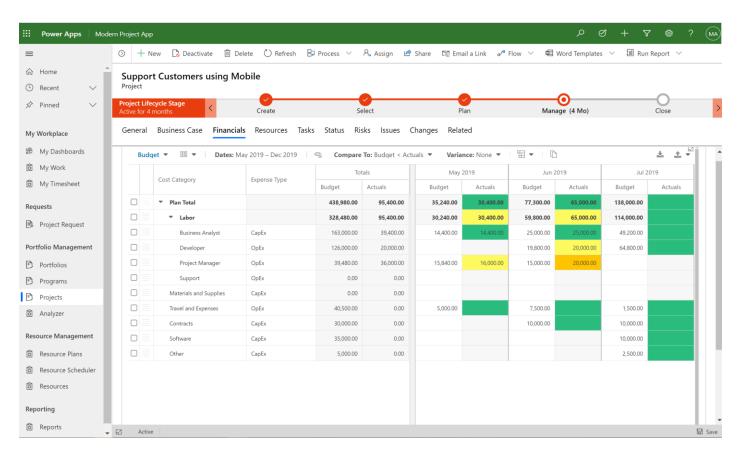
Increase Resource Workload Transparency

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.

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٢ ۲	•																		Q2		Q3	Q4 <mark>0</mark>	Q1	Q2 C	23 Q	4
ē P		20							Phones				(2) Active		(2) At			3,913	_		_					
B		22				23 4	ji (elopment			(2) Active		(1) On			2,370								
Ð						2				Aetro Transit Aut		y	(2) Active		(3) Off		3	,227.7								
Ð		24				• 3		-		er Support Porta			(2) Active		(1) On			564								
C) ©			-			P 3		÷.		SharePoint farms			(2) Active		(1) On			3,876	•							
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ŝ		29				P 3				port application		all	(1) Proposed		(1) On		4,3	03.06				1]		
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	Но	ours	•	0	Com	mitted	•	Date	s: Dec 20	019 – Dec 2020	Ť	-	7 -													
	Nam	ne							Bus	siness Unit		Role		Dec 20	019	Jan 2020	Feb 2020	Mar 2020	Apr 2	020	May 2020	Jun 2020	Jul 2020	Aug 2020	Sep 2020	Oc
	•	R	Dani	el Wil	iams				іт			Project I	Manager	-	361.50	7.17	23.17	39.	17	-40.83	31.17	-90.67	-39.33	-55.33	126.00	
	•	2	Adar	n Nos	himu	ıri			т			Business	s Analyst		87.99	94.90	26.18	-8.0	01	-12.80	-54.92	176.00	184.00	168.00	176.00	
	۲	8	Amy	Corne	:111				іт			Business	s Analyst		152.00	124.00	0.00	-200.0	00	-216.00	-72.00	76.00	184.00	168.00	176.00	
	۱.	¢ I	Busi	ness A	nalys	st			ІТ			Business	s Analyst		-27.00	-258.00	-194.00	6.0	00	6.00	78.00	86.00	184.00	168.00	176.00	
	•	ġ I	Deve	loper					Pro	oduct Developmen	t	Develop	er	-1,	072.00	-1,350.00	-750.00	-214.0	00	-256.33	-672.33	2.67	184.00	168.00	176.00	
				n Ziscl					іт				analyst	-	435.50	-155.50	-139.50	-67.		100.50	-3.50	48.00			176.00	
				e Willi					ІТ				s Analyst	-	-47.00	-55.00	41.00	41.0		89.00	81.00	89.00			176.00	
				n Aiac					IT				s Analyst	_	-22.30	-62.30	81.70	97.		97.70	89.70	97.70			176.00	
	•	8	Kond	Kalal	aua				Pro	oduct Developmen	t	Develop	er		-41.00	95.00	135.00	151.0	00	151.00	143.00	151.00	184.00	168.00	176.00	



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

	Project App											৯ ৫	+ 7		
My Portfolio											List 🛛 🕶	Board 🔻	Roadmap	 Dashbe 	oard
	om: Quarter 🔻	Plan Type:	nterprise Proiec	t 🔻 Group	By: None 🔻			Å 🖾	Scenario: No	one 🔻				Financial S	Summ
											2019		2020		
	Name			State	Financ	ial Health	Budg	et	Forecast	Q2	Q3 Q4	Q1	Q2	Q3 Q4	
20 📃 🗹 😰 🐗	VOIP Pho	ines		(2) Active	(2) At	Risk	\$467,0	41.00	\$407,760.00						
22 📃 🗹 📳 🐗	Software	Development		(2) Active	(1) On	Track	\$313,0	50.00	\$0.00				_		
23 📃 🗹 🛃	iOS App	for Metro Transit	Authority	(2) Active	(1) On	Track	\$614,3	00.00	\$578,000.00						
24 📃 🗹 🛃	New Cust	tomer Support P	ortal	(2) Active	(3) Off	Track	\$77,0	00.00	\$107,400.00						
5 🗏 🗹 📳	Relocate	our SharePoint fa	arms to Azur	(2) Active	(1) On	Track	\$545,8	00.00	\$545,800.00						
26 🗮 🗹 💠	As a buye	er, I need to be a	ble to purcha	(2) Active	(1) On	Track	\$150,0	00.00	\$160,000.00						
27 🗮 🗹 📳 🐗	Fabrikam			(1) Proposed	(1) On	Track	\$280,6	30.00	\$289,080.00			_			
28 📃 🗹 📳 🐗	Migrate a	Il Sharepoint Sit	es to Office 3	(2) Active	(1) On	Track	\$202,7	20.00	\$208,170.00		_				
9 🗏 🗹 📭	Eromouro			(1) Decreased	(1) On	Treads	\$570,2	10.00	\$570,240.00						
	Framewo	rk to port applic	ations to all	(1) Proposed	(1) 01		\$570,2	+0.00	\$570,240.00						
31 🗏 🗹 🌒		rk to port applic he Heartbleed w		(1) Proposed (1) Proposed	(1) On (1) On		\$213,0		\$153,000.00					•	
	Counter t		veb security			Track		00.00				••		2	
31 🗏 🗹 🌒	Counter t	he Heartbleed w	veb security	(1) Proposed	(1) On	Track	\$213,0	00.00	\$153,000.00					20	
31 🗮 🗹 🥑 32 🗮 🗹 🚺 🔷	Counter t	he Heartbleed w	veb security on and mess	(1) Proposed	(1) On	Track	\$213,0	00.00	\$153,000.00					L	<u>*</u>
31	Counter t	the Heartbleed w	veb security on and mess	(1) Proposed (1) Proposed	(1) On	Track	\$213,0	00.00	\$153,000.00	Sep 2019	Oct 2019	Nov 2019	Dec 2019	Period Total	<u>*</u>
31 🗮 🗹 🥑 32 🗮 🗹 🚺 🔷	Counter 1 Microsoft	the Heartbleed w t Teams Integrati s: Jan 2019 – De	veb security on and mess c 2019 Tar	(1) Proposed (1) Proposed get: FY19 💌	(1) On (1) On	Track Track	\$213,0 \$467,8	00.00	\$153,000.00	Sep 2019 Budget	Oct 2019 Budget				<u>*</u>
31	Counter 1 Microsoft	the Heartbleed w t Teams Integration s: Jan 2019 – Dev Jan 2019	veb security on and mess c 2019 Tar Feb 2019	(1) Proposed (1) Proposed get: FY19 ▼ Mar 2019	(1) On (1) On Apr 2019	Track Track May 2019	\$213,0 \$467,8 Jun 2019	00.00 00.00 Jul 2019	\$153,000.00 \$450,522.00 Aug 2019	Budget	Budget	Nov 2019	Dec 2019	Period Total	
31	Counter t Microsoft SD V Date Totals Budget	the Heartbleed w t Teams Integration s: Jan 2019 – Dee Jan 2019 Budget	veb security on and mess c 2019 Tar Feb 2019 Budget	(1) Proposed (1) Proposed get: FY19 V Mar 2019 Budget	(1) On (1) On Apr 2019 Budget	Track Track May 2019 Budget	\$213,0 \$467,8 Jun 2019 Budget	00.00 00.00 Jul 2019 Budget	\$153,000.00 \$450,522.00 Aug 2019 Budget	Budget	Budget 500,000.00	Nov 2019 Budget	Dec 2019 Budget	Period Total Budget	
31	Counter 1 Microsoft SD V Date Totals Budget 5,035,000.00	the Heartbleed w t Teams Integration s: Jan 2019 – De Jan 2019 Budget 100,000,00	veb security on and mess c 2019 Tar Feb 2019 Budget 65,000.00	(1) Proposed (1) Proposed get: FY19 Mar 2019 Budget 100,000.00	(1) On (1) On Apr 2019 Budget 140,000.00	Track Track May 2019 Budget 250,000.00	\$213,0 \$467,8 Jun 2019 Budget 400,000.00	00.00 00.00 Jul 2019 Budget 1,100,000.00	\$153,000.00 \$450,522.00 Aug 2019 Budget 1,000,000.00	Budget 750,000.00 827,418.33	Budget 500,000.00 737,019.33	Nov 2019 Budget 380,000.00	Dec 2019 Budget 250,000.00	Period Total Budget 5,035,000.00	
31	Counter 1 Microsoft SD Date Totals Budget 5,035,000.00 6,344,472.00	the Heartbleed w t Teams Integration s: Jan 2019 – De Jan 2019 Budget 100,000,00	veb security on and mess c 2019 Tar Feb 2019 Budget 65,000.00	(1) Proposed (1) Proposed get: FY19 Mar 2019 Budget 100,000.00	(1) On (1) On Apr 2019 Budget 140,000.00	Track Track May 2019 Budget 250,000.00	\$213,0 \$467,8 Jun 2019 Budget 400,000,00 552,525,00	00.00 Jul 2019 Budget 1,100,000.00 1,210,398.33	\$153,000.00 \$450,522.00 Aug 2019 Budget 1,000,000.00 1,053,818.33	Budget 750,000.00 827,418.33	Budget 500,000.00 737,019.33 40,000.00	Nov 2019 Budget 380,000.00 633,499.33	Dec 2019 Budget 250,000.00	Period Total Budget 5,035,000.00 6,076,842.00	
31 ≣ ♥ ♀ 32 ≡ ♥ ₽ ↓ ∪ Budget ♥ □□ ♥ ↓ ∪ Name Target: FY19 ♥ Plan Totals VOIP Phones	Counter 1 Microsoft SD Date Totals Budget 5,035,000.00 6,344,472.00 467,041.00	the Heartbleed w t Teams Integration s: Jan 2019 – De Jan 2019 Budget 100,000,00	veb security on and mess c 2019 Tar Feb 2019 Budget 65,000.00	(1) Proposed (1) Proposed get: FY19 Mar 2019 Budget 100,000.00	(1) On (1) On Apr 2019 Budget 140,000.00	Track Track May 2019 Budget 250,000.00	\$213,0 \$467,8 Jun 2019 Budget 400,000,00 552,525,00	00.00 Jul 2019 Budget 1,100,000.00 1,210,398.33	\$153,000.00 \$450,522.00 Aug 2019 Budget 1,000,000.00 1,053,818.33	Budget 750,000.00 827,418.33 88,800.00 34,200.00	Budget Budget S00.000.00 40 737,019.33 40,000.00 37,800.00	Nov 2019 Budget 380,000.00 633,499.33 74,041.00	Dec 2019 Budget 250,000.00 393,438.33	Period Total Budget 5,035,000.00 6,076,842.00 467,041.00	
31 ■ ✓ ✓ 32 ■ ✓ ✓ Budget ▼ III ✓ Target: FY19 ✓ ✓ VOIP Phones Social Networking Integrati	Counter 1 Microsoft Totals Budget 5,035,000.00 6,344,472.00 467,041.00 142,600.00	the Heartbleed w t Teams Integration s: Jan 2019 – De Jan 2019 Budget 100,000,00	veb security on and mess c 2019 Tar Feb 2019 Budget 65,000.00	(1) Proposed (1) Proposed get: FY19 ▼ Mar 2019 Budget 100,000.00	(1) On (1) On Apr 2019 Budget 140,000.00	Track Track May 2019 Budget 250,000.00 281,185.00	\$213,0 \$467,8/ Jun 2019 Budget 400,000,00 552,525,00 43,920,00	00.00 Jul 2019 Budget 1,100,000.00 1,210,398.33 94,280.00	\$153,000.00 \$450,522.00 Aug 2019 Budget 1,000,000.00 1,053,818.33 126,000.00	Budget 750,000.00 827,418.33 88,800.00 34,200.00 93,600.00	Budget 500,000.00 737,019.33 40,000.00 37,800.00 118,600.00	Nov 2019 Budget 380,000,00 633,499,33 74,041,00 37,800,00	Dec 2019 Budget 250,000.00 393,438.33 25,600.00	Period Total Budget 5,035,000.00 6,076,842.00 467,041.00 135,400.00	
31 I G G G G G G G G G G G G G G G G G G	Counter 1 Microsoft SD Date Totals Budget 5,035,000.00 6,344,472.00 467,041.00 142,600.00 545,800.00	the Heartbleed w t Teams Integration s: Jan 2019 – De Jan 2019 Budget 100,000,00	veb security on and mess c 2019 Tar Feb 2019 Budget 65,000.00	(1) Proposed (1) Proposed get: FY19 ▼ Mar 2019 Budget 100,000.00	(1) On (1) On Apr 2019 Budget 140,000.00 151,545.00	Track Track May 2019 Budget 250,00000 281,185.00 20,760.00	\$213,0 \$467,8 Jun 2019 Budget 400,000,00 552,525,00 43,920,00 41,400,00	00.00 00.00 Jul 2019 Budget 1,100,00000 1,210,398.33 94,280.00 152,560.00	\$153,000.00 \$450,522.00 Budget 1,000,000.00 1,053,818.33 126,000.00	Budget 750,000.00 827,418.33 88,800.00 34,200.00 93,600.00 15,600.00	Budget 500,000.00 40,000,00 37,019,33 40,000,00 37,800,00 118,600,00 13,920,00	Nov 2019 Budget 380,000,00 633,499,33 74,041,00 37,800,00	Dec 2019 Budget 250,000.00 393,438.33 25,600.00	Period Total Budget 5,035,000.00 6,076,842.00 467,041.00 135,400.00 545,800.00	

Optimize Financial Investments

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



My Work

•	Power	App	s Mo	dern Pr	oject Ap	pp										٦	ଁ	i -	- 1	7	ŝ	?	M
		Му	/ Work																List	Boa	ərd	Resource	E2 e Plar
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			Wo	rk T	Complete	Name		Status	Start	Due	↑ % Done		ember		January		22 February		2022 Marc		_	2 April	
													9 26	02 09	16 23	30 0	6 13 20	27 0	6 13	10 27	0 Now	17 24	4 0
						\vee As a ma	nager, I need to be able to view sales reports					0%											
		C) Bac	:klog			Annotations	Not Started				0%											
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						\vee OnePla	n Work Plan		03/14/2022	03/25/2022		0%								•			
		C) Bac	klog			Update DB schema	Not Started	03/14/2022	03/25/2022		0%											
						∨ Planner			12/27/2021	01/31/2022		0%	-										
		C) Tas	ks			Interview Talking Points	Waiting for son	12/27/2021	01/18/2022		0%											
		C) Tas	ks			Marketing Campaign for Launch Events	Not Started	01/17/2022	01/31/2022		0%											
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				anges			Add resource	In Progress				50%											
		C) Bac	klog	~		Locate new location	Completed	01/17/2022	01/28/2022		100%											
		C) Issu	Jes			Need a new location for Tower controls	Deferred	03/08/2022	03/08/2022		50%						1					
						> Work P	lanner		09/02/2020	03/18/2022		8%											
						> Azure D)evOns		01/31/2022	03/03/2022		12%											

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

::: Power Apps	Proje	ect									م	Ø +	· 7	🅸 ? 😡
≡		My Times	sheet Jun 20, 2021 - Jun 26, 2021	< iii >								Utilizatio		
☆ Home			🛱 🛱 🖻 🔒 Time Entry	• 🗄 •								0%		total Hours 40.00
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Home			Architecture Design											
🖻 My Work		□ ❷	Define scope for application boundarie Plan: Architecture Design				2.00		4.00	5.00	1.00		12.00	29 / 56.6 h
🗟 My Timesheet		0												
Requests		U	Infrastructure upgrades											
🕅 Project Request		□ ⊘	Develop work schedule Plan: Infrastructure upgrades				4.00	2.00	4.00		5.00		15.00	35.5 / 160 h
Project Management			Social Networking Integration											
Program		□ ⊘	Determine project scope Plan: Social Networking Integration				2.00	5.00		3.00	1.00		11.00	27.25 / 40 h
Projects			Customer Survey											
💼 Analyzer		□ ○	Define survey type Plan: Customer Survey				1.00				1.00		2.00	2 / 16 h
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8 Resource Scheduler	r													
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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

	OnePlan				!Adap	tive Portfol	io Tree 🔻	?	Daniel Williams HOKU LOGIC	đ
ð	Monday January 18, 2021 Welcome back, Daniel Williams									E
נ	Insights $^{\circ}$					Recent C	onversation	S		
9	Xou have 1 or more timesheets overdue View Details							functional speci oproved. Who i	ications in VOIP Phone	s
2	😣 💍 You have some plans that have less than 75% Compliance View	w Details				2 EV		ams at 12/23/20		
	Some of your plans have status reports that are due View Details	5					Resource: Da	niel Williams on	Service interface to su	ррс
	You have some timesheets to approve View Details					2	by Daniel Willi	ck man? I said ams at 12/17/20		
	You have 79 overdue tasks View Details						View Thread		vare specifications in V	011
	You have 3 tasks due this week View Details					A	Where can I	find the latest ams at 11/21/20	draft?	
	You have some status reports to review and approve View Detail	ls					View Thread			
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	Plans					Due Soo	n			
	🕀 💌 🛛 Recent Favorite Plans I Own Plans Shared With Me All Plans	Find Plan				Overdue	This Week	This Month		Û
	Name	Compliance	Plan Type	Last Accessed		Nam	e		Due	
	Support Customer using Mobile	80%	Project	01/18/2021		C Less	ons Learned		01/22/2021	
	Social Networking Integration	80%	Project	01/18/2021		O Core	Messaging		01/21/2021	
	World-Class Customer Support	100%	Program	01/18/2021		O Defi	ne Audience		01/20/2021	
	Enhanced TFS Integration	_	Idea	01/15/2021						
	Cloud and Mobile First	100%	Portfolio	01/14/2021						
	Customer Feedback Interface	60%	Epic	01/12/2021						
	Microsoft Teams Integration and messaging	80%	Project	01/12/2021						
	401k Enhancements		Idea	01/12/2021						

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

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

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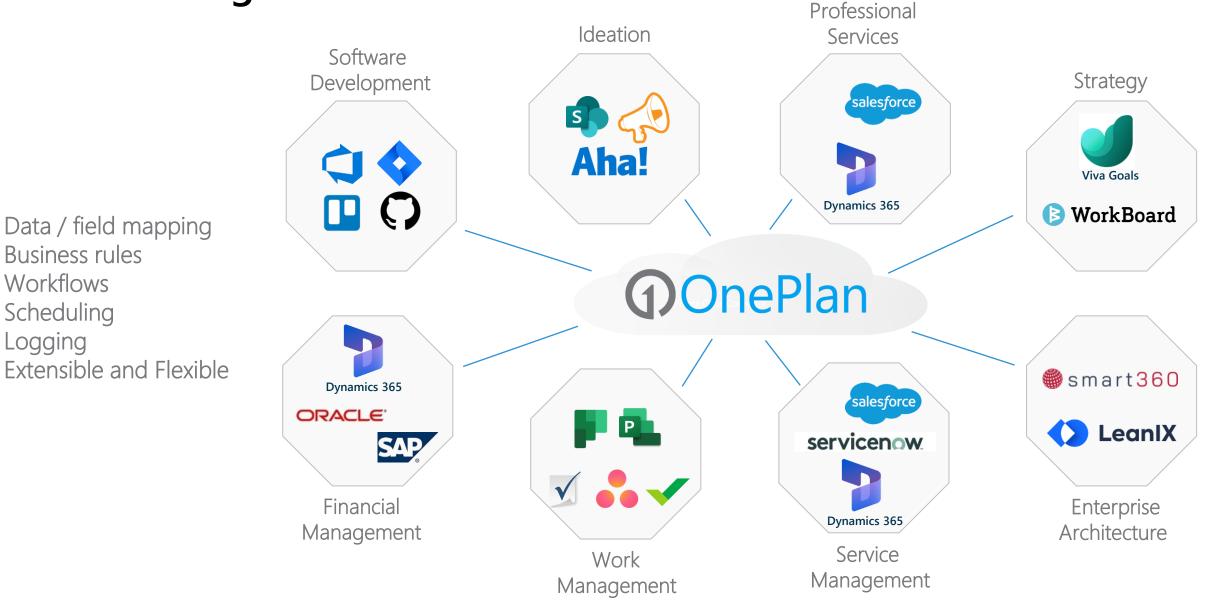
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	OnePlan				!Adaptive Por	tfolio Manager ?	Daniel Williams HOKU LOGIC	9							
俞	Support Custon	ner using Mobile			Details Financials	Resource Plan	E2 Work Plan ▼ Reporting ▼	1 ×							
Ē	State: Pending Submit	R				Exp	oort * Report: 03/10/2022 *								
	Project Information							•							
0	Name:	Support Customer using Mobile		Stage:	(3) Plan										
	Portfolio:	Cloud and Mobile First		Executive Sponsor:	Daniel Williams										
8	Program:	World-Class Customer Support		Manager:	Daniel Williams										
0	Project Schedule														
Label	Estimated Start:	01/03/2022	Estimated End:	01/03/2022	% Done:	0%									
[6.001]	Project Financials								147 117		6			0 0	
\bigcirc	Budget:	\$1,076,996.20		Benefits:	\$450,000.00		Prograr	n Financials:	World-0	Class Custom	er Suppo	ort	01		INANCIALS EXECUTION
	Forecast:	\$240,597.71		ROI:	-58%		J								
ŝ	Actuals:	0					Budget	Program Budget vs. Budg	et		For	ecast by Month	h		
	Remaining Budget:	\$1,076,996.20						\$1,150K							
(B	Budget Variance:	\$836,398.49					\$1M								
	buuget vanance.	\$630,596.49							\$0.5M						
8	Health						Forecast								
	Overall Health:	(1) On Track	Financial Health:	(2) At Risk	Effort Health:	(1) On Track	TOTECast	¢1 (20)(
	Schedule Health:	(1) On Track	Issue Health:	(1) On Track			\$2M	\$1,420K	10.014						
\odot							Ψ=141	\$0M	\$0.0M	l 2021 Jar	2022	Jul 2022	Jar	2023	Jul 2023
4	Tasks In Progress:	1	Tasks At Risks:	0	Tasks Off Track:	0	Actual Spend	Budaet b	y Project/Epic		Buc	dget vs. Foreca	ist & Cumulati	ves by Quarter	
								-	,	Cumulat		lative Actual Cost 😑 C			
		Proj	ect Sta	atus Re	ports		\$350K	Support Customer using Mobile – Service interface to support R –	Counter the Hea	rtbleed web secur					
		,					D 1 11/1			\$1M					
							Budget Variance		CRM Upgr	ade					
							(\$284K)	Framework to port applications		\$0M					
							(\$204K)		- Fabrikam		019 2019 2019 2019 Q1 Q2 Q3 Q4	9 2020 2020 2020 2 Q1 Q2 Q3	2020 2021 2021 20 Q4 Q2 Q3 Q	21 2022 2022 2022 2 4 Q1 Q2 Q3 (022 2023 2023 2023 Q4 Q1 Q2 Q3
							Name		Plan Type Financial	Budget Forecast	Actuals Bu	dget Variance Ren	naining Budget Be	nefits ROI	
							Fabrikam		Epic	\$335,723 \$562,200		(\$226,477)	110,722.90	\$780,000	132.33%
							Counter the Heartbleed web	b security bug	Epic 🔺	\$283,400 \$371,200	0.00	(\$87,800)	283,400.00	\$550,000	94.07%
							Framework to port applicati		Project 🔶	\$278,320 \$355,720		(\$77,400)	153,320.00	\$550,000	97.61%
							Support Customer using Mo	obile	Project	\$234,606 \$241,800	0.00	(\$7,194)	234,605.99	\$450,000	91.81%
							CRM Upgrade Service interface to support	Part AD	Project	\$214,750 \$99,550	0.00	\$115,200 \$0	214,750.00 73,400.00	\$246,000 \$550,000	14.55% 649.32%
							Service interface to support Totals	Rest API	Project 🔶	\$73,400 \$73,400 \$1,420,199 \$1,703,870		\$0 (\$283,671)	1,070,198.90	\$3,126,000	179.95%
							.000			\$1,700,000 \$1,700,010	550,000,000	(9000,011)	1,010,100.00	40,120,000	

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OnePlan Integrations





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Workflows

Scheduling

Logging

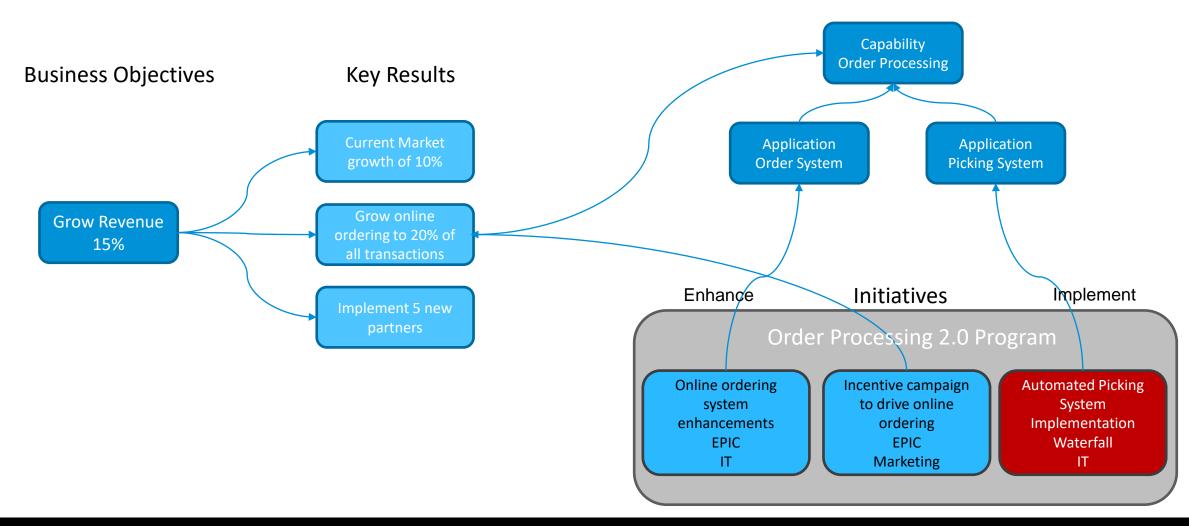
The Move to Strategic Portfolio Management (SPM)

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.



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Further Alignment Needed for Strategic Portfolio Management (SPM)



Enterprise Architecture

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One Comprehensive Solution

	Onel	Pla	an					!St	rategic Portfolio	• \$?		Patterson
ŵ	My St	trat	tegy						List 🛛 🔻	Board 🛛 🕶 R	oadmap 🛛 🔻	⊡ Dashboard
Ô	• •		Plan Type: Objective 🔻 🗎 🗄 🖉 Zo	om: Month 🔻	Group	p By: None 🔻	7 • ∣ ⊫	<u> </u>			Ö	Objective Summary
Ð		đ	🖧 👫 Name	I	Plan Type	Status	Priority	Business Unit	Estimated End	Current Metric	Budget	Prioritization S
9	≡	Ð	Launch The New Product Successfu	lly (3)	Objective	(1) On Track	(1) High	Product Devel	oj 12/31/20	83%	\$620,000.00	75
2	≣		Create 20 customer case studies		Key Result	(1) On Track	(2) Medium	Marketing	10/01/21	100%	\$200,000.00	0
2	≣		Get into the Gartner Magic Qua	drant	Key Result	(1) On Track	(1) High	Marketing	07/01/21	75%	\$300,000.00	0
0	≣		Win a "Best Product of the Year"	award at the ir	Key Result	(1) On Track	(1) High	Marketing	01/01/22	75%	\$120,000.00	0
dat	\equiv	Ð	Minprove Customer Excellence (4)		Objective	(2) At Risk	(2) Medium	IT	12/30/21	78%	\$0.00	63
	\equiv		Achieve NPS of 9 from our custo	omers	Key Result	(2) At Risk	(2) Medium	IT	12/30/21	89%	\$0.00	0
Ð	≡		Increase Customer Retention to	98%	Key Result	(1) On Track	(3) Low	Marketing	10/01/21	81%	\$0.00	0
8	\equiv		Achieve a product engagement	of 80% WAU	Key Result	(3) Off Track	(1) High	Product Devel	op 10/01/21	69%	\$0.00	0
~	\equiv		Interview 20 Customers and get	Feedback	Key Result	(1) On Track	(2) Medium	Product Devel	op 01/01/22	75%	\$0.00	0
	≣	Ð	Transform Corporate Culture (4)		Objective	(2) At Risk	(1) High	IT	06/30/22	37%	\$0.00	63
~	≣		CEO and SVPs to launch a mont	hly all-hands Tc	Key Result	(1) On Track	(1) High	Product Devel	pp 01/01/22	25%	\$0.00	0
2	≣		Achieve a weekly Employee Sati	sfaction / Pulse	Key Result	(2) At Risk	(2) Medium	IT	06/30/21	50%	\$0.00	0
	≣		Celebrate "small wins" and any t	ype of progress	Key Result	(1) On Track	(2) Medium	IT	10/01/21	23%	\$0.00	0
	≣		Launch an ongoing closed-loop	feedback proce	Key Result	(1) On Track	(3) Low	IT	01/01/22	50%	\$0.00	0
2	\equiv	Ð	Generate More Marketing Qualified	Leads (4)	Objective	(1) On Track	(1) High	Marketing	01/01/22	43%	\$0.00	75
9	-	-	*									

Strategic Plan

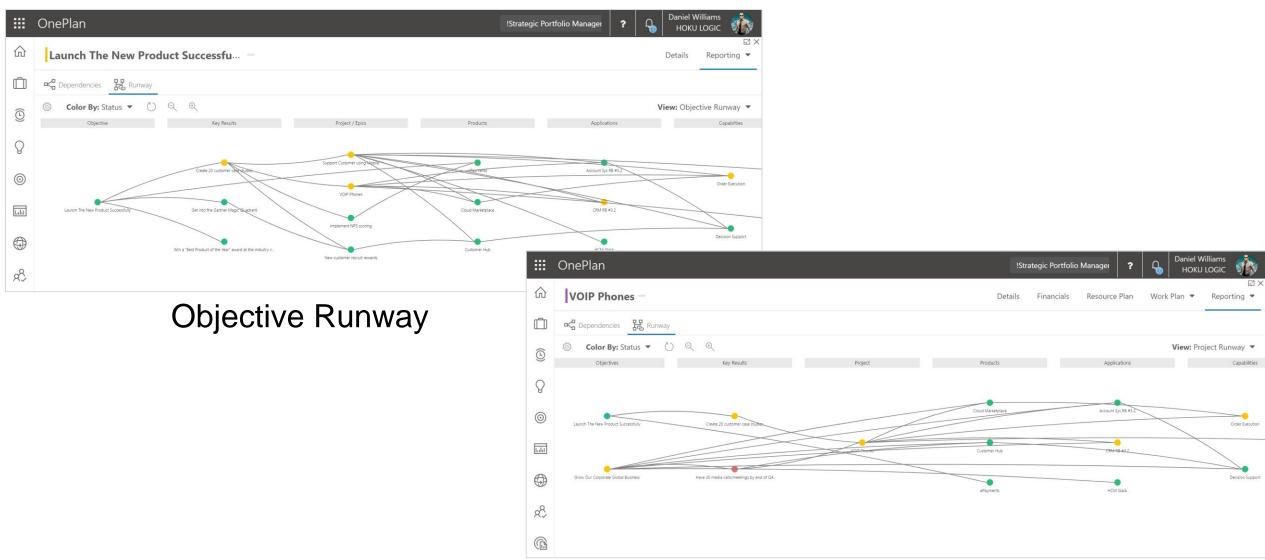
	OnePlan					J	Strategic Port	iolio 🔻	\$?	Q	Jim Patterso ONEPLA	
命	My Enterprise	e Architecture								List	▼ Da:	5 shboard
Ē	🕂 👻 🕴 Plan	Type: 6 Types 🔻 🗄 📄 Zoom:	Month 🔻 🗌 Group	By: Element 🔻	$\nabla \bullet$		- 0 1	- -			Ö	EA Strategy
0	Å	Name	Plan Type	EA-Strategy \downarrow	State	Strategic Align	Lower Cost	Improve Empl	o Risk Rec	uction	Prioritization S	BL
9		✓ Products (3)										\$25,000,00
Q	=	Cloud Marketplace	Products	Current Architec	Proposed		Not Rated	Moderate	Low			ş
	=	Customer Hub	Products	Current Architec	Proposed		Strong	Moderate	Low			\$15,000,00
0	=	ePayments	Products	Current Architec	Proposed		Extreme	None	Strong		63	\$10,000,00
Laht		✓ Organization (1)										5
	=	OnePlan	Organization	Current Architec	Proposed	Not Rated	Not Rated	Not Rated	Not Ra	ed	0	5
(✓ Application (6)										\$1,400,00
ŝ	=	Monetary txs RB # 2.0	Application	Target Architectu		Extreme	Low	Extreme	Strong		75	\$500,00
×v	≡	Account-Sys RB # 3.2	Application	Target Architectu	Proposed	Strong	Moderate	Low	Modera	te	50	\$100,00
ß	≡	CRM RB# 3.2	Application	Target Architectu		Low	Low	Not Rated	Not Ra	ed	13	\$300,00
~	=	HCM Stack	Application	Target Architectu		Strong	Strong	Extreme	Low		69	\$250,00
8	=	CRM RB # 3.1	Application	Current Architec		Low	Low	Low	Low		25	\$100,00
	=	Account-Sys RB # 3.1	Application	Current Architec		Low	Low	Low	Low		25	\$150,00
		> Capability (9)										\$950,00
\bigcirc		> Value Stream (2)										\$3,500,00

Enterprise Architecture

	OnePlan						Strategic Po	tfolio 🔻	¢ ?	Jim Patters	
ŵ	My Portfolio						List	▼ Board	▼ Roadn	nap 🔻 D	£3 ashboard
Ē	🕀 🔻 🛛 Plar	n Type: 2 Types 🔻 🕂 🖃 Zoom: N	Nonth 🔻 🛛 G	roup By: Program	• 7•		J 🔹 🕺 🛯	2 📩 🔻		O Pro	ect Summary
٩	Å	Name	Plan Type	State	Overall Health	Schedule Health	Financial Health	Effort Health	Issue Health	Budget	в
9		\vee World-Class Customer Support (8)								\$1,986,673.00	\$3,839,99
Q	= 📫	Support Customer using Mobile	Project	Active	(1) On Track	(1) On Track	(1) On Track	(1) On Track	(1) On Track	\$717,594.00	\$900,00
	= 🖷	Framework to port applications to a	I dev Project	Active						\$420,160.00	\$559,99
0	=	Service interface to support Rest AP	Project	On Hold	(1) On Track					\$253,920.00	\$550,00
Laht	=	Fabrikam	Epic	Active						\$225,000.00	\$780,00
	≡	Counter the Heartbleed web security	buc Epic	Proposed	(1) On Track					\$45,000.00	\$550,00
9	≡	TestDates	Project	Proposed	(1) On Track					\$175,000.00	\$250,01
ŝ	=	ScrumProject	Project	Active						\$150,000.00	\$250,00
×v	= 👞	New Product Launch	Project	Proposed	(1) On Track					\$0.00	ŝ
B		\checkmark Improve Infrastructure (6)								\$1,767,787.00	\$3,408,90
~	= 44	VOIP Phones	Project	On Hold		(1) On Track				\$372,750.00	\$1,200,00
8	≡	Microsoft Teams Integration and me	ssagi Project	Active						\$267,985.00	\$500,00
	=	Ai for remote Weather Stations	Project	Proposed	(1) On Track		(2) At Risk	(1) On Track		\$527,333.33	\$580,00
	=	Server Upgrades	Project	Proposed	(1) On Track		(1) On Track			\$599,720.00	\$1,128,90
0	=	EAM Rollout	Project	Proposed	(1) On Track					\$0.00	5
\odot									_		

Project Portfolio

OnePlan Visualizer



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

nePlan

â	Mode	eler(Beta)	: IT 202	2 Plan	ning								НОК	J LOGIC
ī)	æ	E 000	7.	101	Scenario: \$5M Budget 💌 🗌	n 🖾 🖬 🗸							Ö	Alignment
0		"	6 ⁹ 8	Name		Estimated Start	Estimated End	Benefits		Budget	Associated Key R	Results Associated A	Applicati	Associated Proc
Q					Target			\$13,000,	.000.00	\$5,000,000.00				
▤				\sim Ii	n (16)			\$14,466,	,666.00	\$4,821,199.00				
	~	1			Customer Feedback Interface	03/14/2022	07/28/2022	\$120,000	0.00	\$279,800.00	Increase Custor	mer Re		
Q	~	2			Management requires a better sales rep	c 03/16/2022	12/09/2022	\$1,200,0	00.00	\$201,007.50	Hit company g	lobal si		
0	~	3			New Customer Support Portal	01/17/2022	06/02/2022	\$110,000	0.00	\$194,604.00	Create a Custo	mer Cc		
	~	4			Delivering Agile Solutions	01/03/2022	03/21/2022	\$870,000	0.00	\$203,500.00	Increase the co	impany		Cloud Market
laht	~	5			Support Customer using Mobile	01/03/2022	11/10/2022	\$412,500	0.00	\$576,510.00	Achieve a prod	luct en: Account Sy	s RB #3.2,	Cloud Marketp
Ð	~	6			EHR Implementation	02/15/2022	12/01/2022	\$600,000	0.00	\$226,556.67	Achieve a week	dy Emp Account Sy	s RB #3.2	Customer Hub
D)	~	7			Server Upgrades	01/03/2022	10/28/2022	\$110,000	0.00	\$304,310.00	Achieve NPS of	f 9 fron		
8	~	8			Fabrikam	05/26/2022	10/06/2022	\$780,000	0.00	\$333,360.00	Achieve NPS of	f 9 fron Account Sy	s RB #3.2	ePayments
(B	~	9			Service interface to support Rest API	01/10/2022	11/10/2022	\$550,000	0.00	\$588,817.50	Win a "Best Pro	oduct c CRM RB #3	.2	ePayments
8	List													
铝	Name		Tot	al In	Target Budget	Total Budget			Target B	enefits		Total Benefits		
-0	\$5M B	udget	16		\$5,000,000.00	\$4,821,202	.33		\$13,000	0,000.00		\$14,466,666.67		
	\$4.5M	Budget	14		\$4,500,000.00 🗢	\$4,423,528.	33 🗢		\$13,000	,000.00		\$12.856,666.67	-	

What-if Scenario Modeling

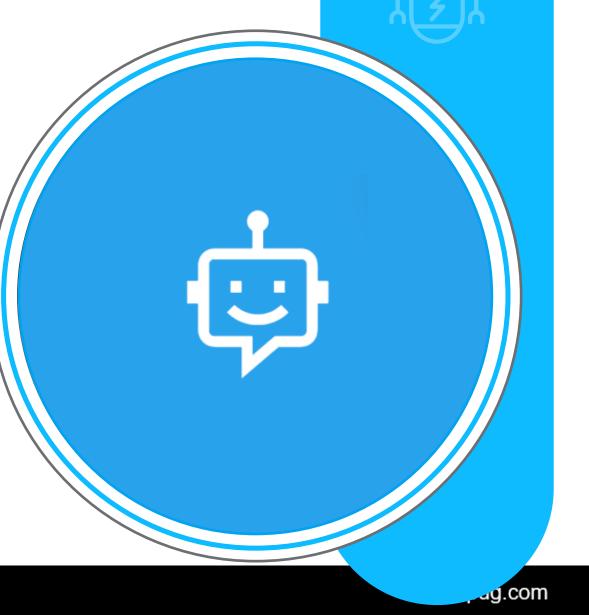


Say Hello to OnePlan's Sofia GPT

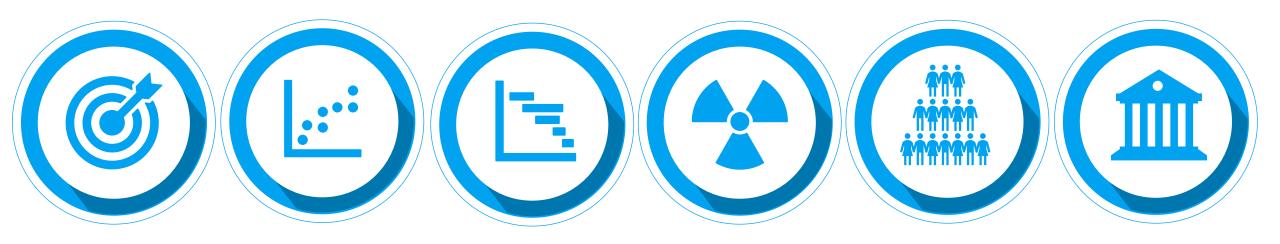
"AI as a Collaborator" The Revolutionary New Language Model for Strategic Portfolio and Work Management

- OnePlan's Sofia GPT is an advanced Azure OpenAl GPT (Generative Pretrained 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 OpenAl'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.





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.

C

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

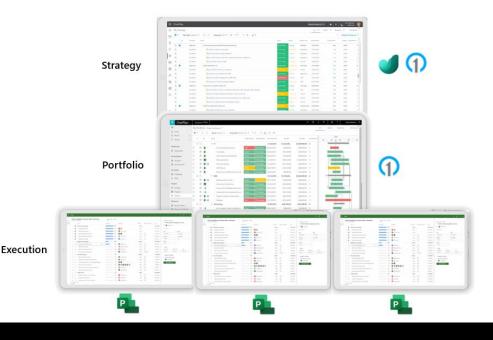


Summary

- 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



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



INFO~TECH

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





Microsoft



Project & Portfolio Management



Content

Cloud Productivity Cloud Platform



Migration Complexity From Project Online Understood with available tools Moderate change in user experience Complex and potential loss of functionality PŖ Project Online Microsoft Dynamics 365 **Project Operations Project for the web and Power Apps** Pros Pros • Aligned with Microsoft Vision • Robust solution for complex Flexible platform for addressing project delivery environments • Built on the Dynamics platform specific requirements Known license model Cons • Higher licensing costs Cons Missing functionality in Project • Lacks native Project Desktop • Online integration • Likely requires investment in • Wholesale change of resource custom Apps or third-party tools management module to meet current functionality Comments A more expensive option that may Comments Well aligned with MS vision but require an adoption of more functionality than needed. needs maturation.



From Project Online – Better Together



Migration Complexity

Understood with available tools

Moderate change in user experience

Complex and potential loss of functionality

Project for the web and Power Apps

nePlan

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



(nePlan Partner)

INS.10 provision Scenarios Templates Projects Sync History	R Figueroa 🗸 🕈	15.10 preview Provision Se	cenarios Templates Projects	s Sync History			R
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	Step 6 sopy complete!	Step 1 Configure connection to the data source.	Step 2 Configure connection to the target environment.	Step 3 Review the data elements, define mappings.	Step 4 Review and define configuration mappings.	Step 5 Wait for the data copy process to complete	Step 6 Data copy complete!
Migrate Projects from Project Online to Project for the web		Migrate Projects f	rom Project Online to	Project for the web			
Source		Scenario execution rest	ults				
○ Template ● Project Online ○ Project for The Web		Status: Completed					
https://M365x923271.sharepoint.com/sites/pwa			0, 6:11:52 PM 0, 6:33:26 PM				
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Authentication method O Device (default and recommended)			65x923271.sharepoint.com/sites/	pwa			
Device (derauit and recommended) Second Se		Source User: MOD Adm	inistrator admin@M365x923271.	onmicrosoft.com			
admin@M365x923271.onmicrosoft.com		Target type: Project for	the Web				
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Login		Custom Fields					
		Field	Status				
Back Next	All Scenarios	Capitalize	Created				

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Migration Workshop

Workshop Agenda

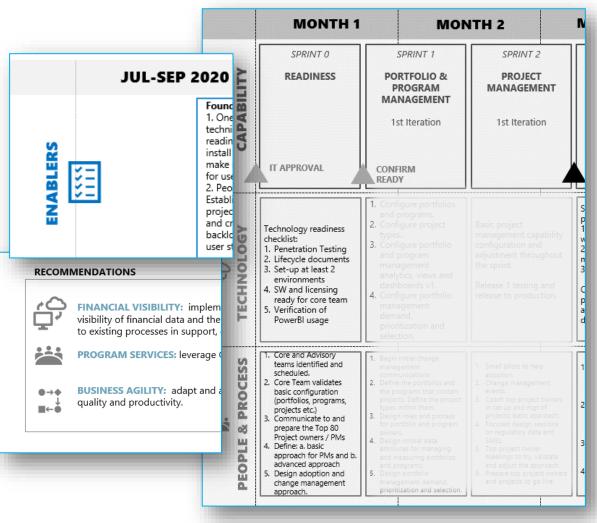
- Demonstration and discussion of the new technology options based on the Microsoft stack. Includes opportunities to leverage Microsoft Teams, Microsoft Power Platform, Project for the Web, Azure DevOps and OnePlan apps.
- Review your business objectives for portfolio and work management, including any 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/

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you

nePlan



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 [...]

Categories

Adaptive Portfolio

		rtf	

Financial Management

Professional Service Automation

Resource Plan

Strategic Planning

Team Collaboration

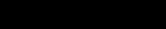
On-Demand Webinars

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



Get Started Today! - Free Trials

Assistance available from OnePlan

https://oneplan.ai/solutions/



OnePlan Solutions

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



Align strategy to investments, understand impacts &

model trade-offs in today's dynamic business

environment.

Learn More

Get Started

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



Adaptive Project Portfolio Management

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

Learn More





Product Portfolio Management

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

Learn More





Agile Portfolio Management

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

Learn More





Collaborative Work Management

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

Learn More





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

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Lahd	• •	± =	Zoom: Month 🔻 Plan Type: Objective 🔻 Group By: No	ne 🔻 🍸 💌				
	00	Plan Type	Name	Status	Business Unit	Lead	Priority	Estimated End
	≡	Objective	V Improve Customer Excellence	(2) At Risk	IT	Richard Hendricks	(2) Medium	12/31/2020
ß	≡	Key Result	Increase customer retention to 98%	(1) On Track	Product Development	Jack Barker	(2) Medium	09/30/2020
CD	≡	Key Result	Achieve a product engagement of 80% WAU	(3) Off Track	Product Development	Gavin Belson	(1) High	09/30/2020
FL.	≡	Key Result	Interview 20 customers and get feedback	(2) At Risk	Marketing	Gavin Belson	(1) High	10/14/2020
0	≡	Key Result	Achieve NPS of 9 from our customers	(2) At Risk	Marketing	Jack Barker	(1) High	12/31/2020
Х	≡	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	(i) nigri	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	п	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
	\equiv	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





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

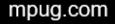


For more information: contact@oneplan.ai



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www.oneplan.ai





Thank You!

Navigation the Future Of Microsoft Project and Project Online

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Jim Patterson Strategic Portfolio Management Solutions



mpuy.com