



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.

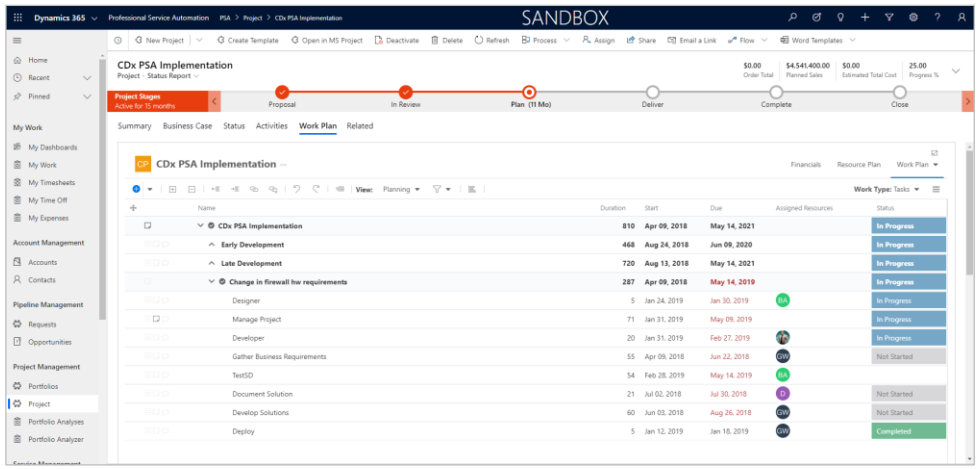
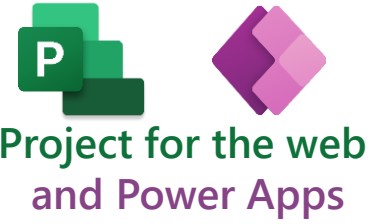
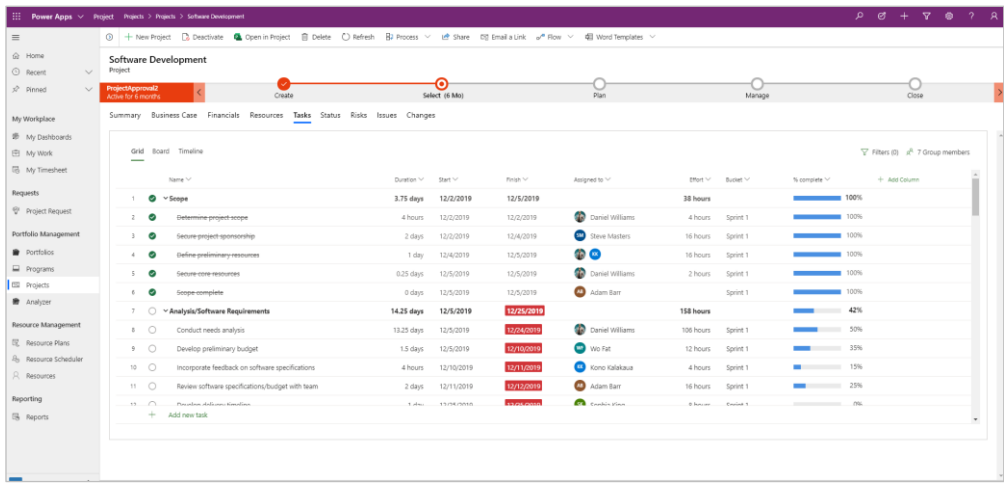
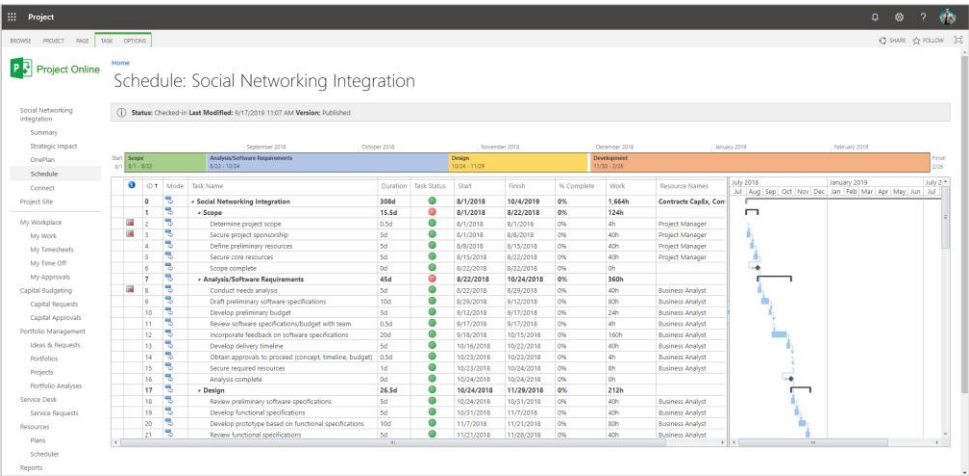
There is no date to limit the functionality of Project Online at this time, but we encourage customers to plan their transition as soon as possible. We know that many of you depend on Project Online. Therefore, any decision on the date to limit functionality will be carefully made taking into account 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





Fresh new experience

Microsoft Project



Collaboration made easy

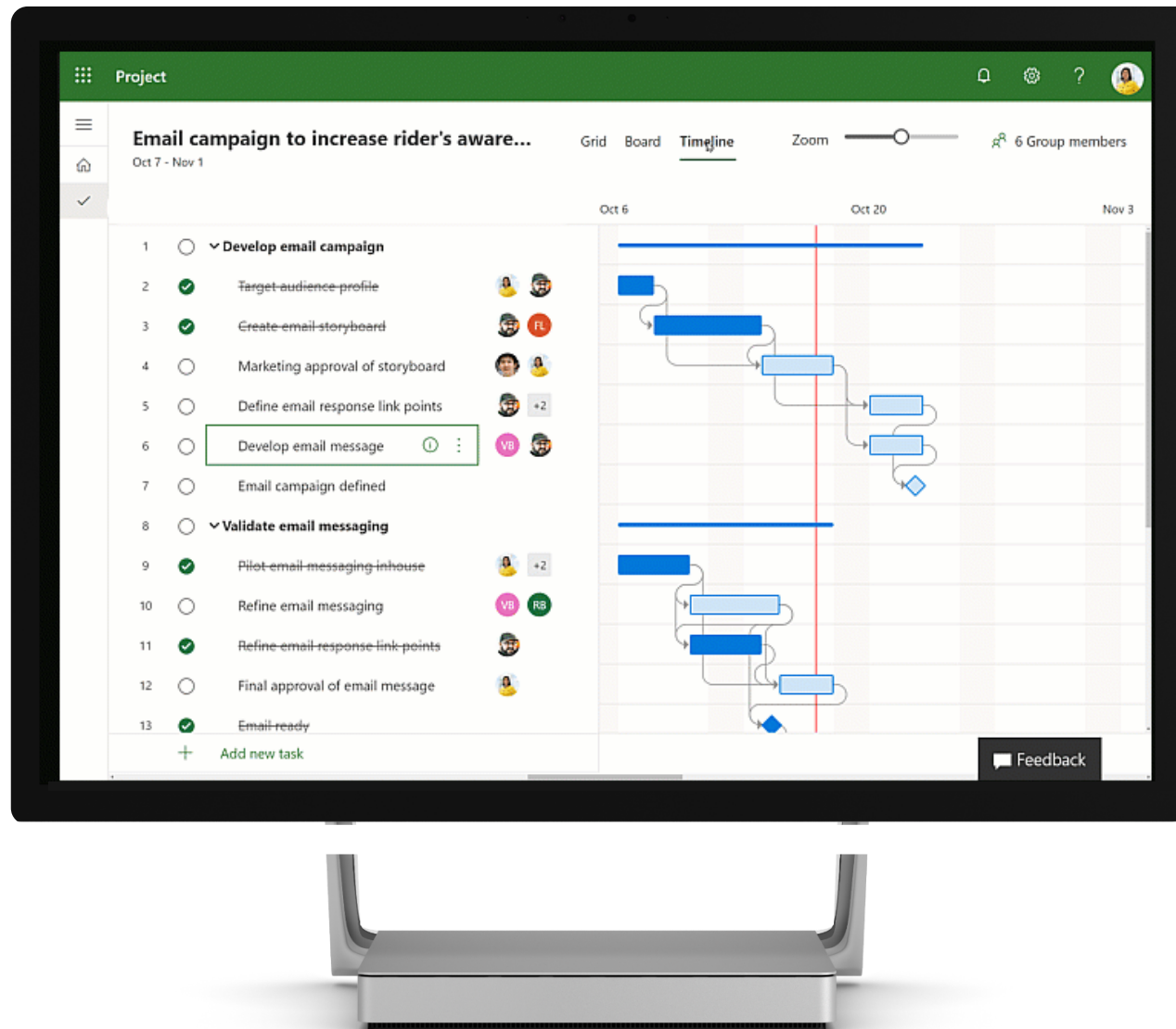
Simple & powerful project
management for everyone



Intelligent planning

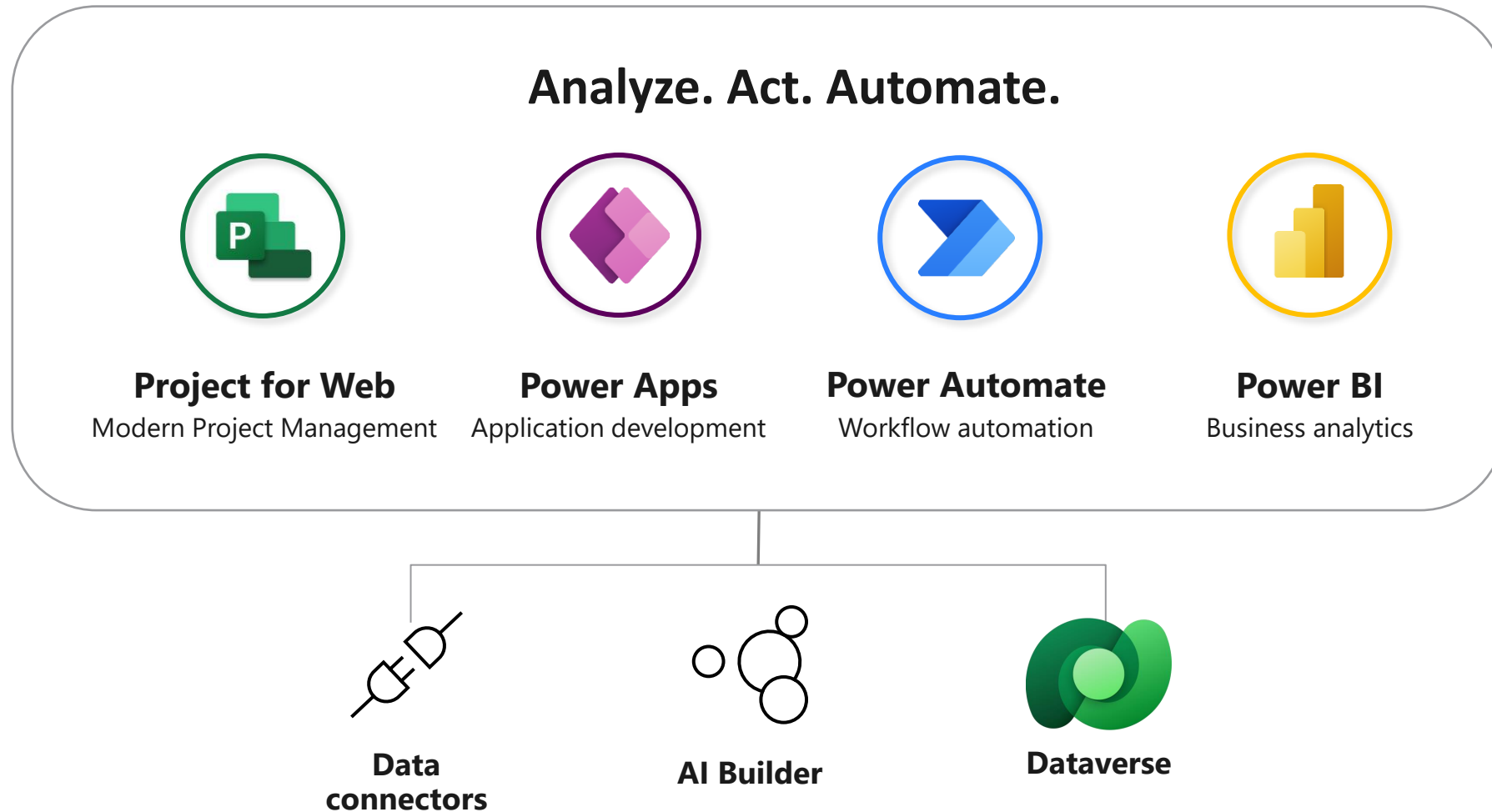


Innovation platform



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

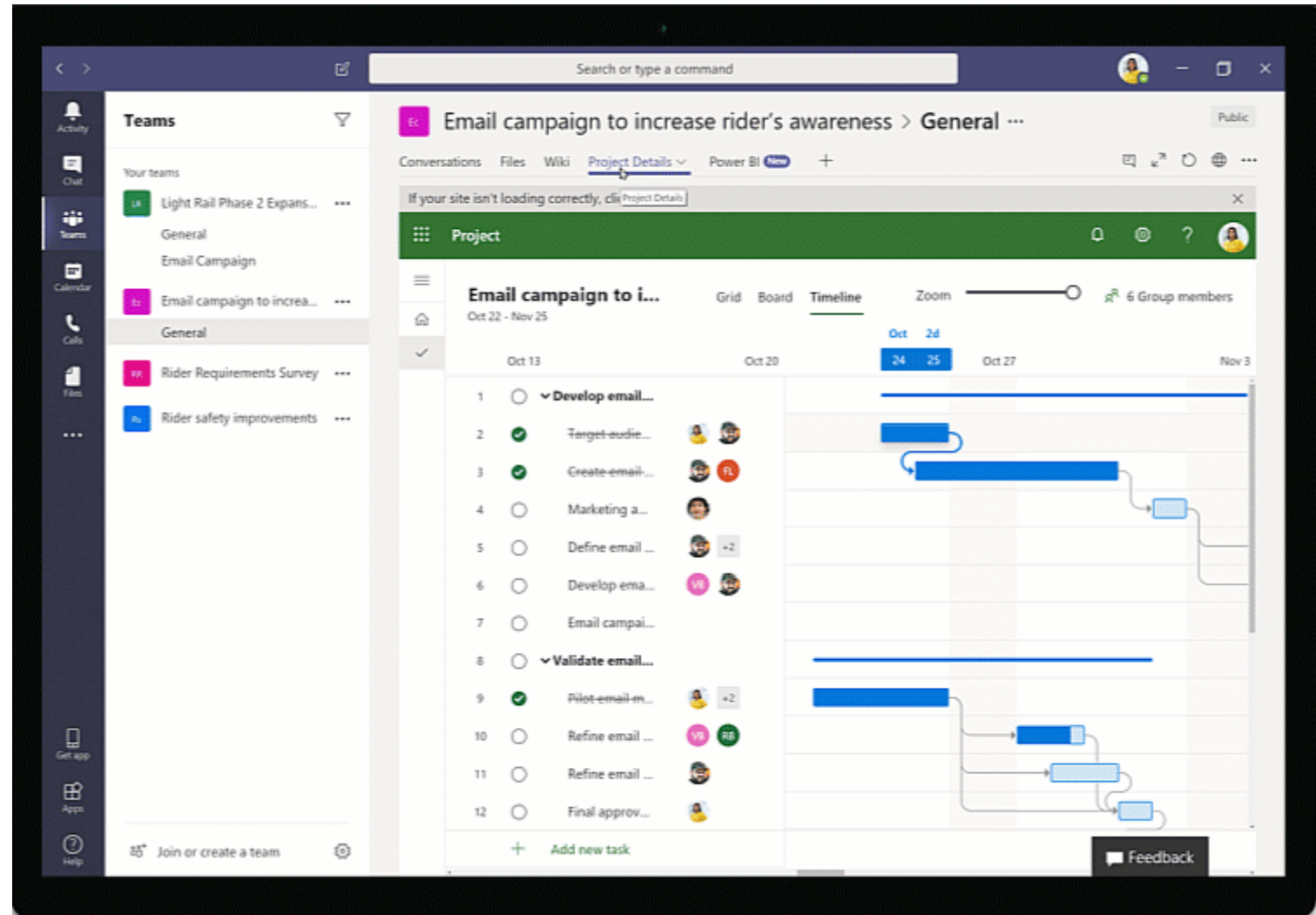
// Microsoft 365, Dynamics 365, and Power Platform, on top of what we're doing with Azure, is the **core of what we are doing as a company.**

Satya Nadella
CEO, Microsoft

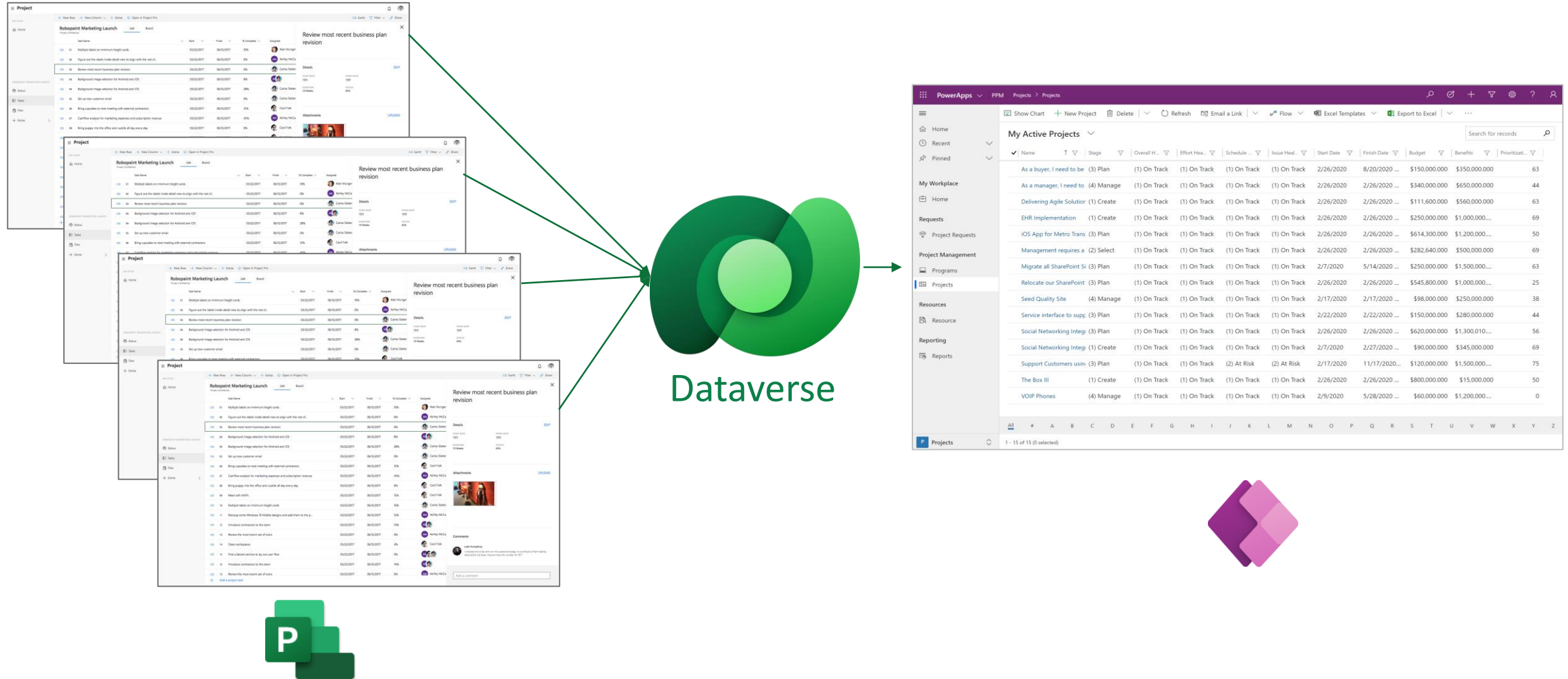


Uses Teams for Content and Collaboration

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



All Projects in Dataverse – Power Apps Solutions

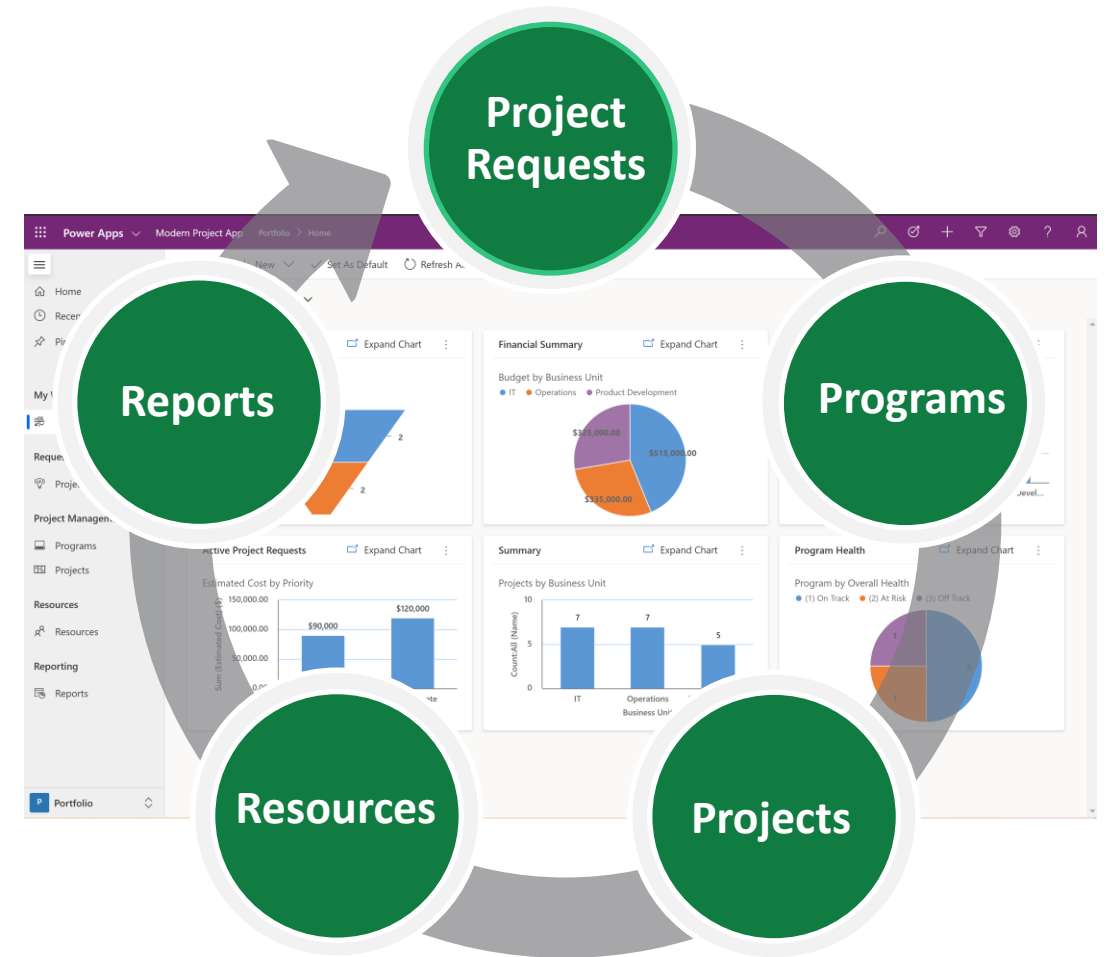


Modern Project for the web Accelerator Solution

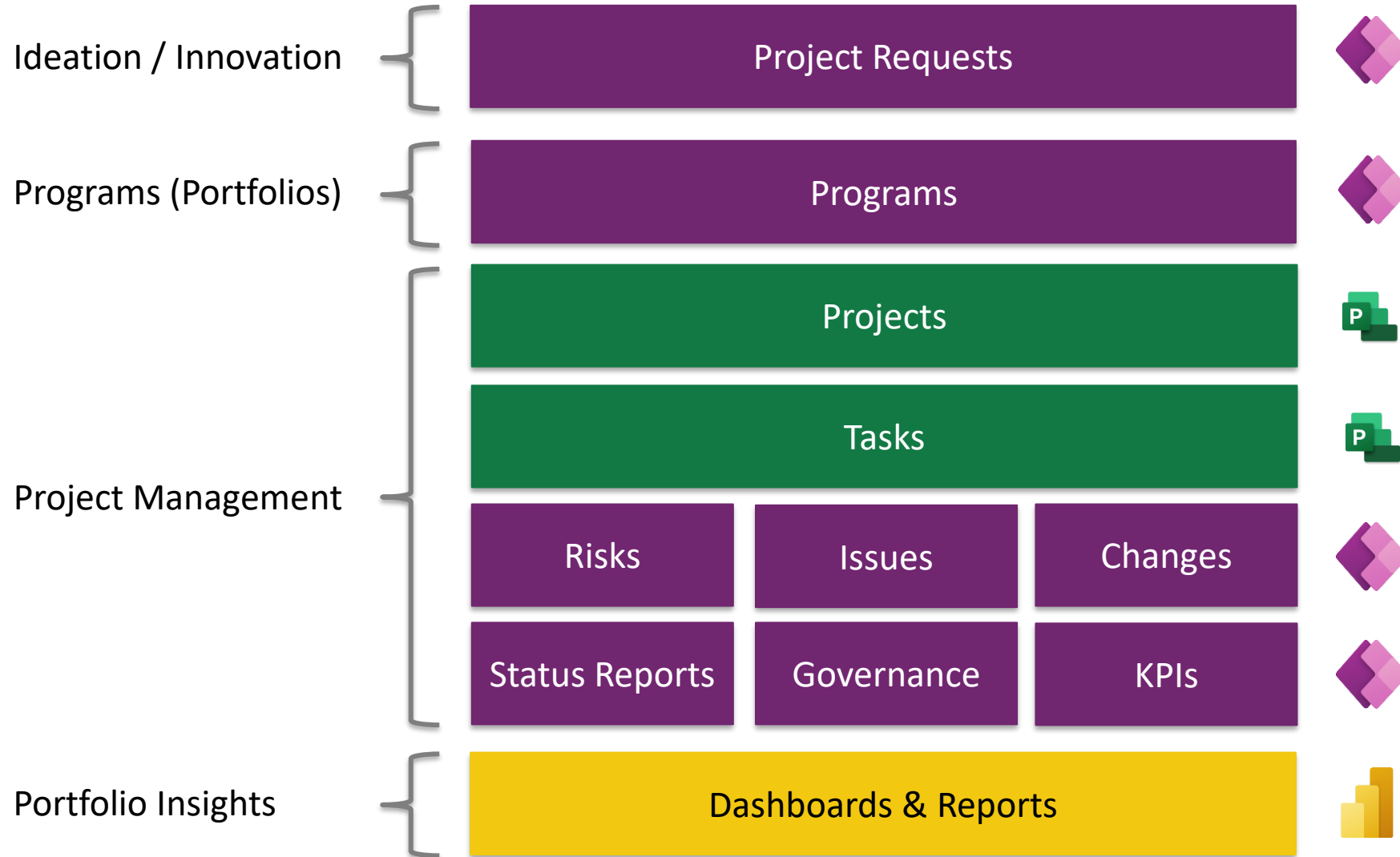
(aka Project Accelerator, PPM Accelerator, PMO Accelerator)

Developed for Microsoft by OnePlan

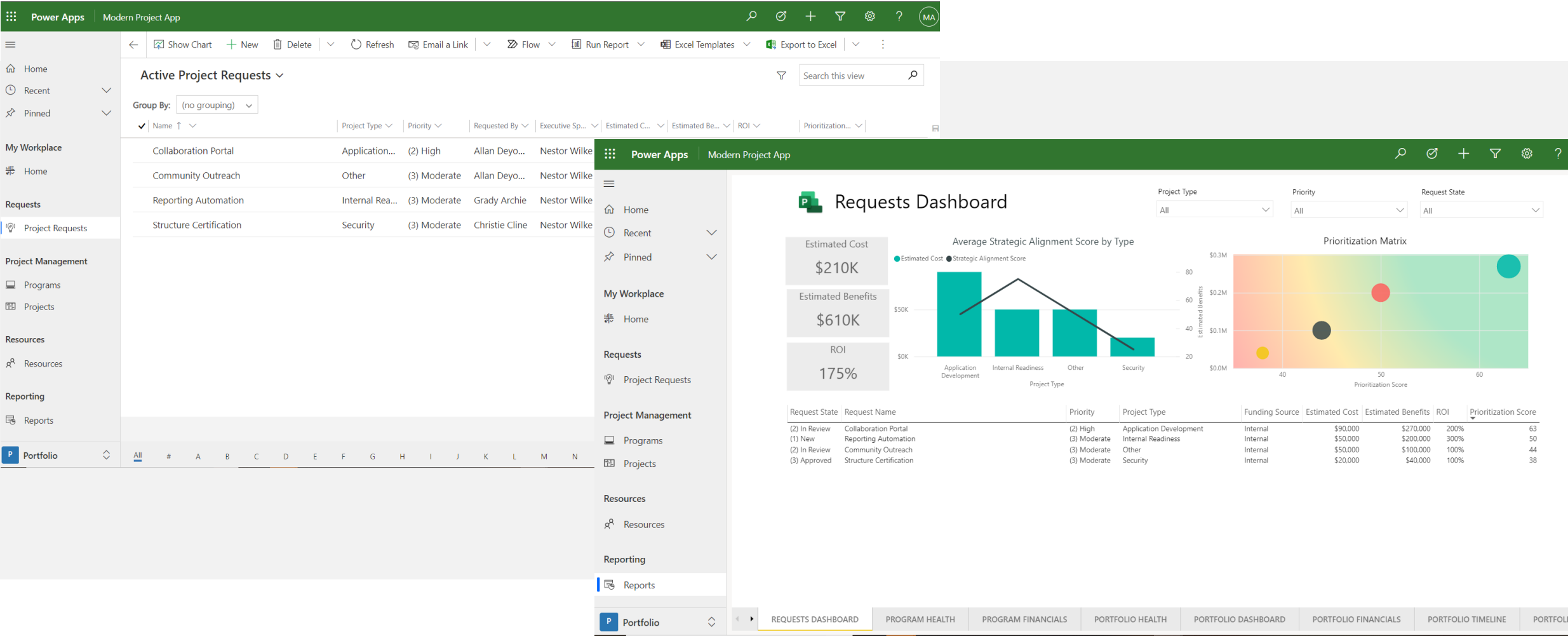
Demonstrates the use the Power Platform and with Project for the web for Project for Project and Program (Portfolio) Management requirements.



Project Accelerator Solution Components



Demand Management



Ideation & Project Requests

Program Management

Power AppsModern Project App

HomeRecentPinnedMy WorkplaceRequestsProject ManagementProgramsProjectsResourcesReportingPortfolio

Customer Success Factors
Programs
GeneralFinancialsStatusProjectsNotesRelated

Program Information

NameCustomer Success FactorsOwner

State(2) ActiveManager

Priority(2) HighProgram Type

Business UnitProduct DevelopmentProgram Goals

Schedule

Program Start6/30/2020Program Due

Narrative

Description---

Power AppsModern Project App

HomeRecentPinnedMy WorkplaceRequestsProject ManagementResourcesReportingPortfolio

Program Financials

StateAllProgram GoalsAllBusiness UnitAll

Program Budget\$11.08M

Project Budget\$4.11M

Remaining Budget\$6.97M

Program & Project Budget by Type

Program Budget by Business Unit

Program Budget Allocation

Program Name	Financial Health	State	Program Budget	Program Benefits	Program ROI	Project Budget	Project Benefits	Project ROI	Remaining Budget Allocation
Cloud Infrastructure Upgrade	(1) On Track	(2) Active	\$500,000	\$1,000,000	100%	\$560,000	960,000.00	0.29	(\$60,000)
Customer Success Factors	(2) At Risk	(2) Active	\$1,000,000	\$2,200,000	120%	\$260,000	360,000.00	0.44	\$740,000
Employee UX	(1) On Track	(2) Active	\$450,000	\$575,000	28%	\$135,000	190,000.00	0.37	\$315,000
Process Improvement	(1) On Track	(2) Active	\$375,000	\$600,000	60%	\$55,000	85,000.00	0.59	\$320,000
Retail Expansion	(1) On Track	(2) Active	\$8,750,000	\$11,200,000	28%	\$3,100,000	1,550,000.00	0.10	\$5,650,000
Total			\$11,075,000	\$15,575,000	336%	\$4,110,000	3,145,000.00	1.79	\$6,965,000

REQUESTS DASHBOARDPROGRAM HEALTHPROGRAM FINANCIALSPORTFOLIO HEALTHPORTFOLIO DASHBOARDPORTFOLIO FINANCIALSPORTFOLIO TIMELINEPORTFOLIO

Program Management

M P you G

mpug.com

Project Management

Project

Software Development

Apr 1, 2021 - Jan 6, 2022

Grid Board Timeline Charts People

Filters 0 Conditional coloring 8 Group members

Name	Start	Finish	Duration	Assigned to	Effort	Dependencies	% complete
1 Scope	4/1/2021	4/7/2021	4.5 days	38 hours			100%
2 Determine project scope	4/1/2021	4/1/2021	4 hours		4 hours		100%
3 Secure project sponsorship	4/1/2021	4/7/2021	4 days	Steve Masters	16 hours		100%
4 Define preliminary resources	4/5/2021	4/6/2021	1 day		16 hours	35%	100%
5 Secure core resources	4/6/2021	4/6/2021	0.25 days	Daniel Williams	2 hours	45%	100%
6 Scope complete	4/6/2021	4/6/2021	0 days	Adam Barr		35%	100%
7 Analysis/Software Requirements	4/6/2021	5/4/2021	19.38 days	162.5 hours			94%
8 Conduct needs analysis	4/6/2021	4/27/2021	14.38 days	Daniel Williams	105 hours	85%	100%
9 Develop preliminary budget	4/27/2021	4/30/2021	3 days	Wu Fat	24 hours	85%	100%
10 Incorporate feedback on software specifications	4/30/2021	5/3/2021	4 hours	Kono Kalakaua	4 hours	95%	100%
11 Review software specifications/budget with team	5/3/2021	5/4/2021	1 day	Adam Barr	13.5 hours	395%	100%
12 Develop delivery timeline	4/26/2021	4/27/2021	1 day	Sophia King	8 hours	85%	100%
13 Secure required resources	4/28/2021	4/28/2021	0.38 days	Kono Kalakaua	3 hours	125%	100%
14 Obtain approvals to proceed (concept, timeline, budget)	4/28/2021	4/28/2021	4 hours	Adam Barr	4 hours	135%	100%
15 Analysis complete	4/29/2021	4/29/2021	0 days	Steve Masters		145%	100%
16 Design	4/29/2021	5/18/2021	14.25 days	108 hours			100%
17 Review preliminary software specifications	4/29/2021	5/2/2021	2 days	Steve Masters	16 hours	135%	100%
18 Develop functional specifications	5/2/2021	5/7/2021	4 days	Kono Kalakaua	32 hours	175%	100%

+ Add new task

Grid

Project

Software Development

Apr 1, 2021 - Jan 6, 2022

Grid Board Timeline Charts People

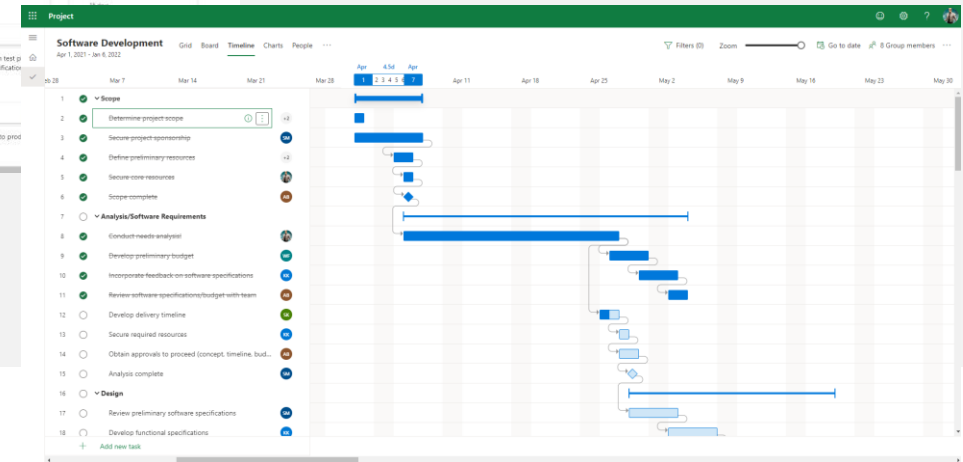
Filters 0 Group by Assigned to 8 Group members

Unassigned

+ Add task

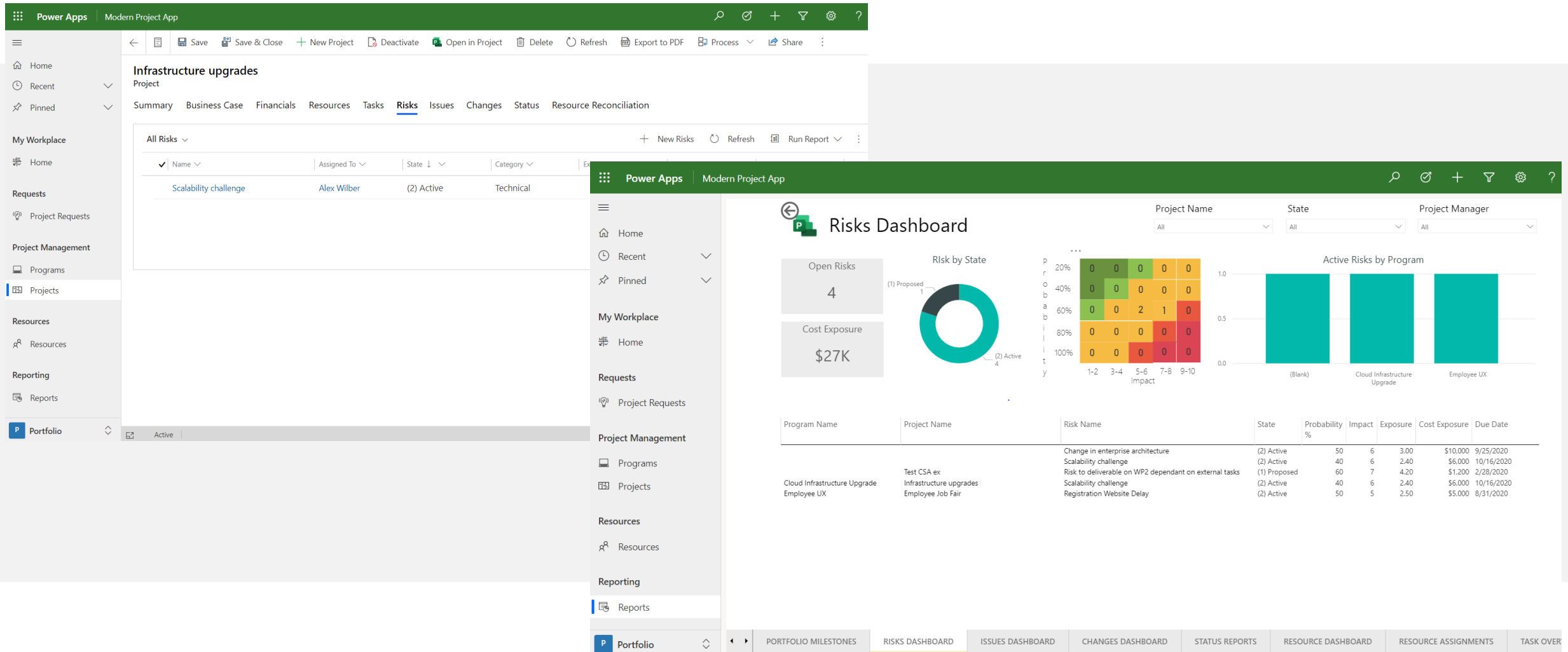
Task	Assigned to	Start	Finish	Duration	Effort	% complete
Review functional specifications	Daniel Williams	05/01/2021	05/01/2021	2 days	16 hours	100%
Design complete	Daniel Williams	05/01/2021	05/01/2021	0 days	0 hours	100%
Development complete	Daniel Williams	05/01/2021	05/01/2021	0 days	0 hours	100%
Review modular code	Daniel Williams	05/01/2021	05/01/2021	5 days	40 hours	100%
Integration testing complete	Daniel Williams	05/01/2021	05/01/2021	0 days	0 hours	100%
Obtain approvals to proceed (concept, timeline, budget)	Adam Barr	04/28/2021	04/28/2021	4 hours	32 hours	100%
Incorporate feedback into functional specifications	Kono Kalakaua	05/01/2021	05/01/2021	1.75 days	14 hours	100%
Review functional specifications	Kono Kalakaua	05/01/2021	05/01/2021	1 day	8 hours	100%
Assign development staff	Kono Kalakaua	05/01/2021	05/01/2021	1 day	8 hours	100%
Test component modules to product specifications	Kono Kalakaua	05/01/2021	05/01/2021	2 days	16 hours	100%
Secure required resources	Kono Kalakaua	05/01/2021	05/01/2021	0.38 days	3 hours	100%
Develop functional specifications	Kono Kalakaua	05/01/2021	05/01/2021	4 days	32 hours	100%
Develop prototype based on functional specifications	Kono Kalakaua	05/01/2021	05/01/2021	4 days	32 hours	100%
Develop unit test plans using product specifications	Kono Kalakaua	05/01/2021	05/01/2021	4 days	32 hours	100%
Identify anomalies to prod specifications	Kono Kalakaua	05/01/2021	05/01/2021	4 days	32 hours	100%
Develop integration test plan using product specifications	Kono Kalakaua	05/01/2021	05/01/2021	4 days	32 hours	100%
Identify anomalies to prod specifications	Kono Kalakaua	05/01/2021	05/01/2021	4 days	32 hours	100%
Develop testing (primary, debugging)	Kono Kalakaua	05/01/2021	05/01/2021	15 days	120 hours	100%
Develop delivery timeline	Sophia King	04/26/2021	04/27/2021	1 day	8 hours	100%
Review preliminary software specifications	Steve Masters	04/29/2021	05/02/2021	2 days	16 hours	100%
Develop code	Steve Masters	05/01/2021	05/01/2021	0 days	0 hours	100%

Board



Timeline

Risk Management



Risk Management

Issue Management

Power Apps

Modern Project App

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Requests

Project Requests

Project Management

Programs

Projects

Resources

Resources

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Save

Save & Close

New Project

Deactivate

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Delete

Refresh

Export to PDF

Process

Share

Infrastructure upgrades

Project

Summary

Business Case

Financials

Resources

Tasks

Risks

Issues

Changes

Status

Resource Reconciliation

All Issues

New Issues

Refresh

Run Report

Name	State	Requestor	Assigned To	Priority	Issue Category	Due Date
Resources PTO	(1) Proposed	Nestor Wilke	Lidia Holloway			

Power Apps

Modern Project App

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Requests

Project Requests

Project Management

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Projects

Resources

Resources

Reporting

Reports

Portfolio

Issues Dashboard

Project Name

State

Project Manager

Active Issues

2

Critical Issues

(Blank)

Active Issues by Priority

(3) Moderate 1

(2) High 1

Issues by State

(1) Proposed

Active Issues by Program

Cloud Infrastructure Upgrade

Process Improvement

Program Name	Project Name	Issue Name	State	Priority	Category	Due Date
Cloud Infrastructure Upgrade	Infrastructure upgrades	Resources PTO	(1) Proposed	(3) Moderate	Issue	10/30/2020
Customer Success Factors	Pandemic awareness poster program	Resources PTO	(1) Proposed	(3) Moderate	Issue	10/30/2020
Process Improvement	Email campaign to increase awareness	Late reporting of spend	(2) Active	(2) High	Issue	9/25/2020
	Data flow integration	Cloud Infrastructure Delay	(1) Proposed	(2) High	Issue	9/24/2020
		Late Vendor Resource Onboarding	(2) Active	(3) Moderate	Issue	1/31/2020

ISSUES DASHBOARD

CHANGES DASHBOARD

STATUS REPORTS

RESOURCE DASHBOARD

RESOURCE ASSIGNMENTS

TASK OVERVIEW

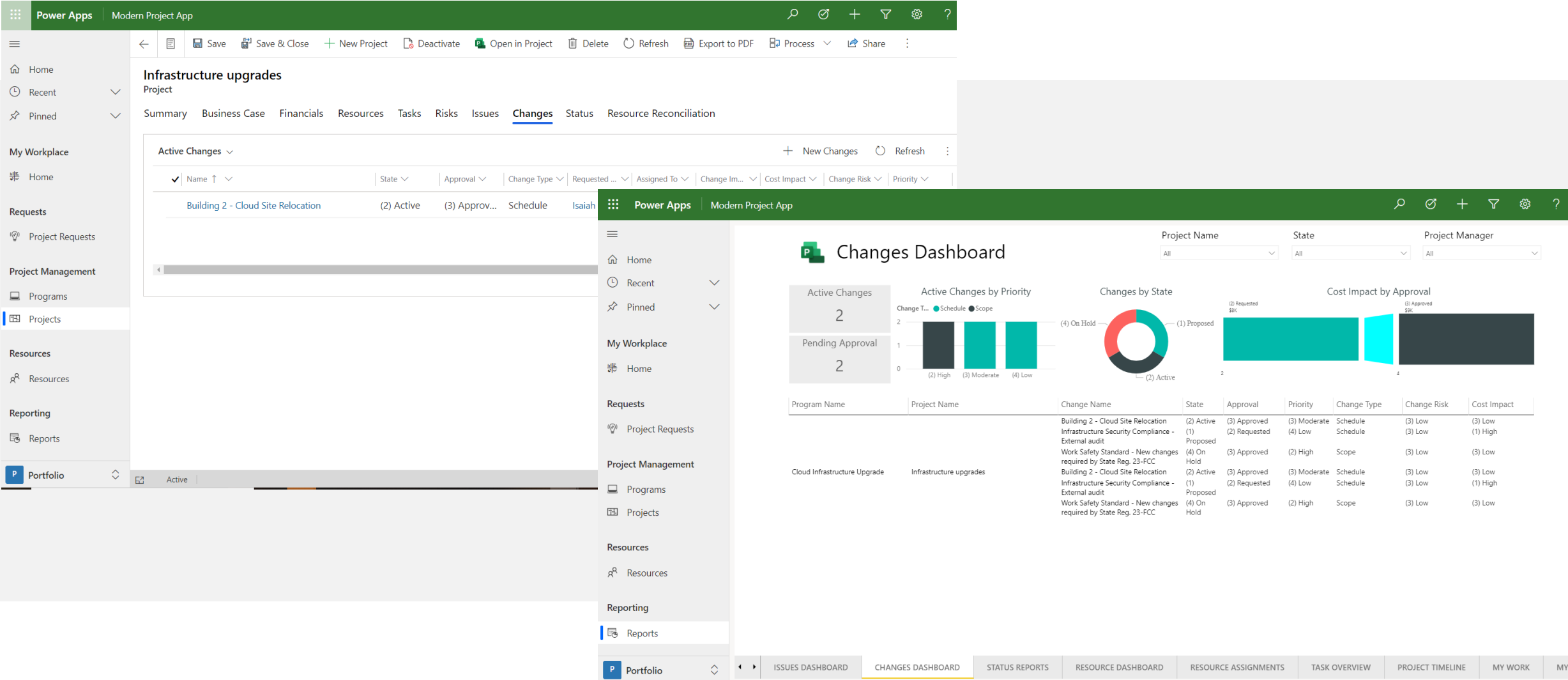
PROJECT TIMELINE

MY WORK

MY

Issue Management

Change Management



Change Management

Status Reports

Power Apps

Modern Project App

Save

Save & Close

New Project

Deactivate

Open in Project

Delete

Refresh

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Infrastructure upgrades

Project

Summary

Business Case

Financials

Resources

Tasks

Risks

Issues

Changes

Status

Resource Reconciliation

Overall Health

(1) On Track

Schedule Health

(1) On Track

Financial Health

(1) On Track

Issue Health

(1) On Track

Effort Health

(1) On Track

Needs Staffing

No

Active Risks

1

Active Issues

0

Last updated:

1/20/2021 12:24 PM

Last updated:

1/20/2021 1

All Status Reports

Name

Reporting Date

Submitter

Submitted

Weekly Status Report

9/6/2020

Alex Wilber

Lidia Holk

Power Apps

Modern Project App

Home

Recent

Pinned

My Workplace

Home

Requests

Project Requests

Project Management

Programs

Projects

Resources

Resources

Reporting

Reports

Portfolio

Status Reports

Program Name

State

Project Manager

Infrastructure upgrades

Latest Report

9/7/2020

Link	Project	Stage	Overall Health	Schedule Health	Financial Health	Issue Health	Active Risks	Active Issues	Active Changes	Budget	Benefits	ROI
	Infrastructure upgrades	(4) Manage	(1) On Track	(1) On Track	(1) On Track	(1) On Track	1	0	1	\$100,000	\$150,000	50%

Reporting Date

Accomplished Activities

Planned Activities

Additional Comments

9/7/2020

-Basic Infra arch scaffold complete
-Provisioning begun

-Add security custom components

-Delays from vendors continue to delay overall timeline

ISSUES DASHBOARD

CHANGES DASHBOARD

Status Reports

RESOURCE DASHBOARD

RESOURCE ASSIGNMENTS

TASK OVERVIEW

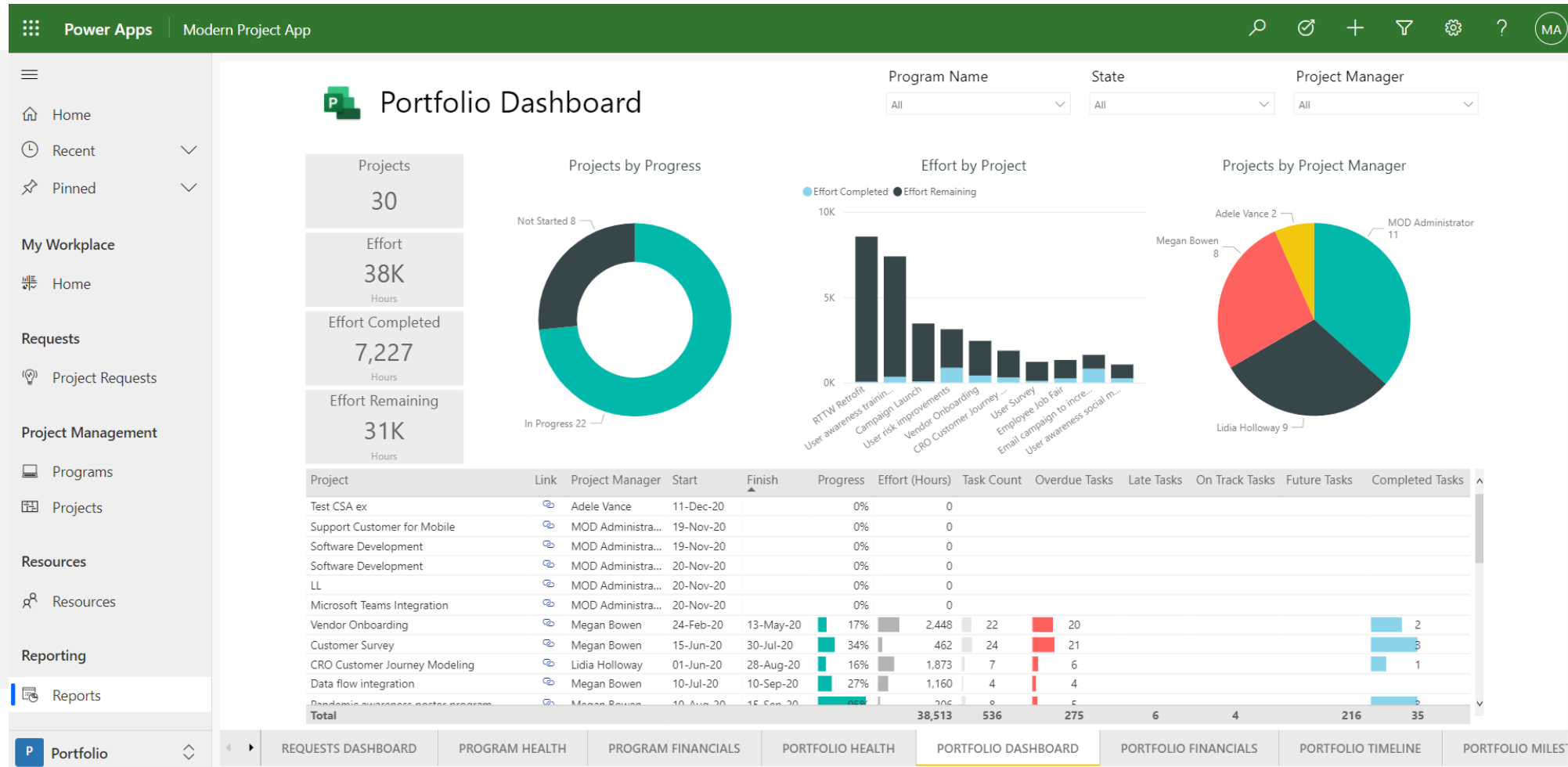
PROJECT TIMELINE

MY WORK

MY

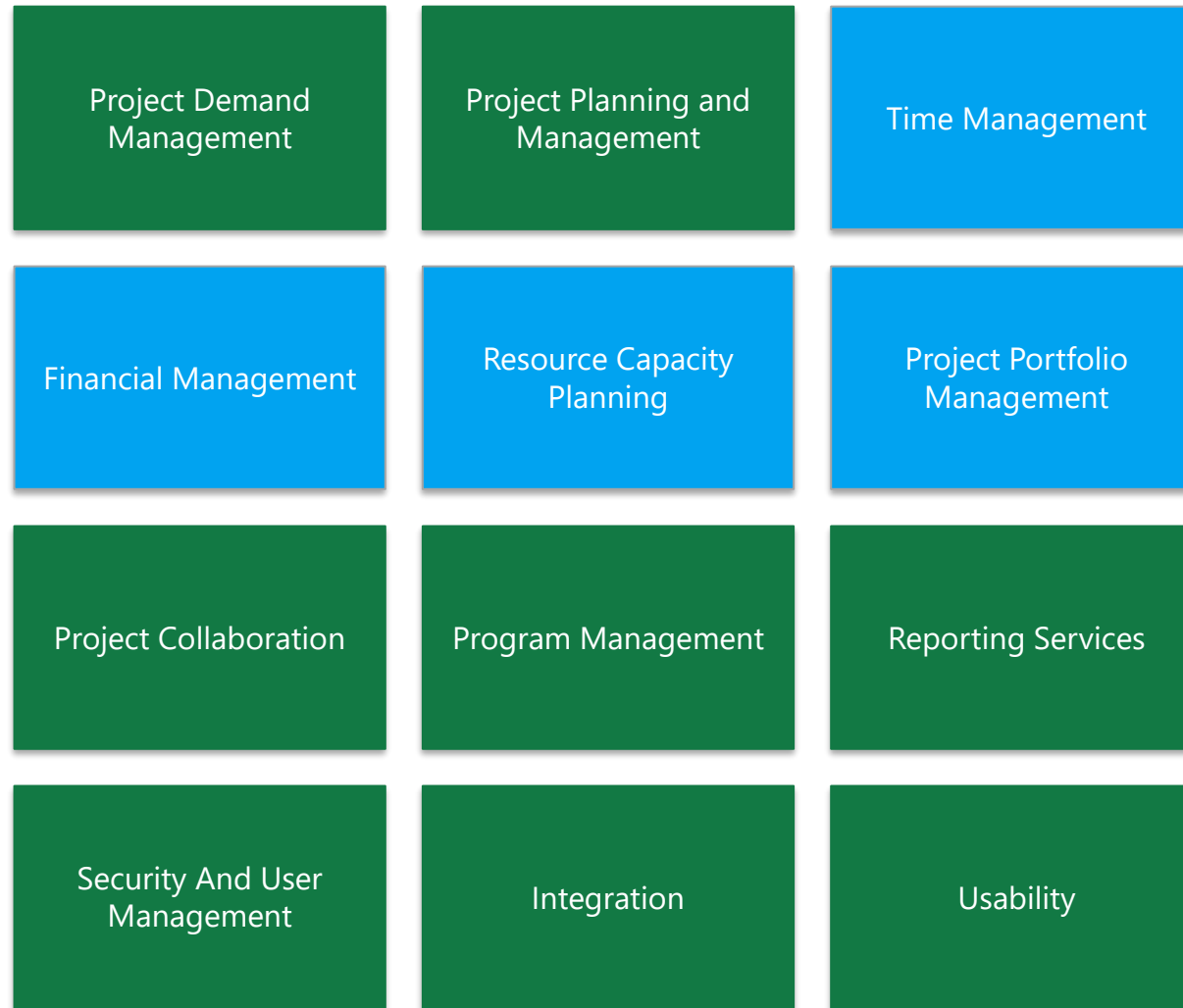
Project Status Reports

Project Intelligence



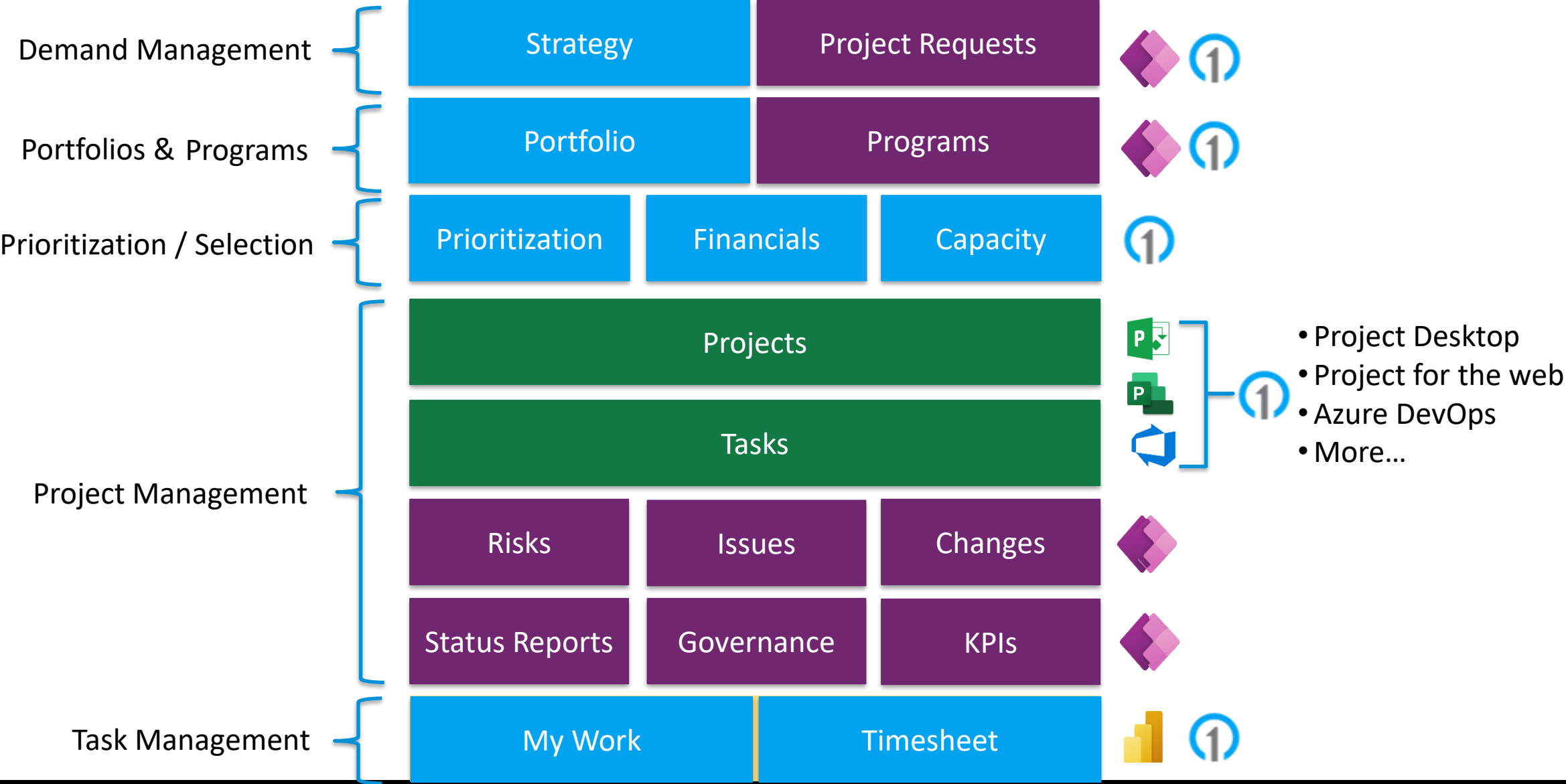
Accelerator Report Pack

Critical Capabilities for Project Portfolio Management

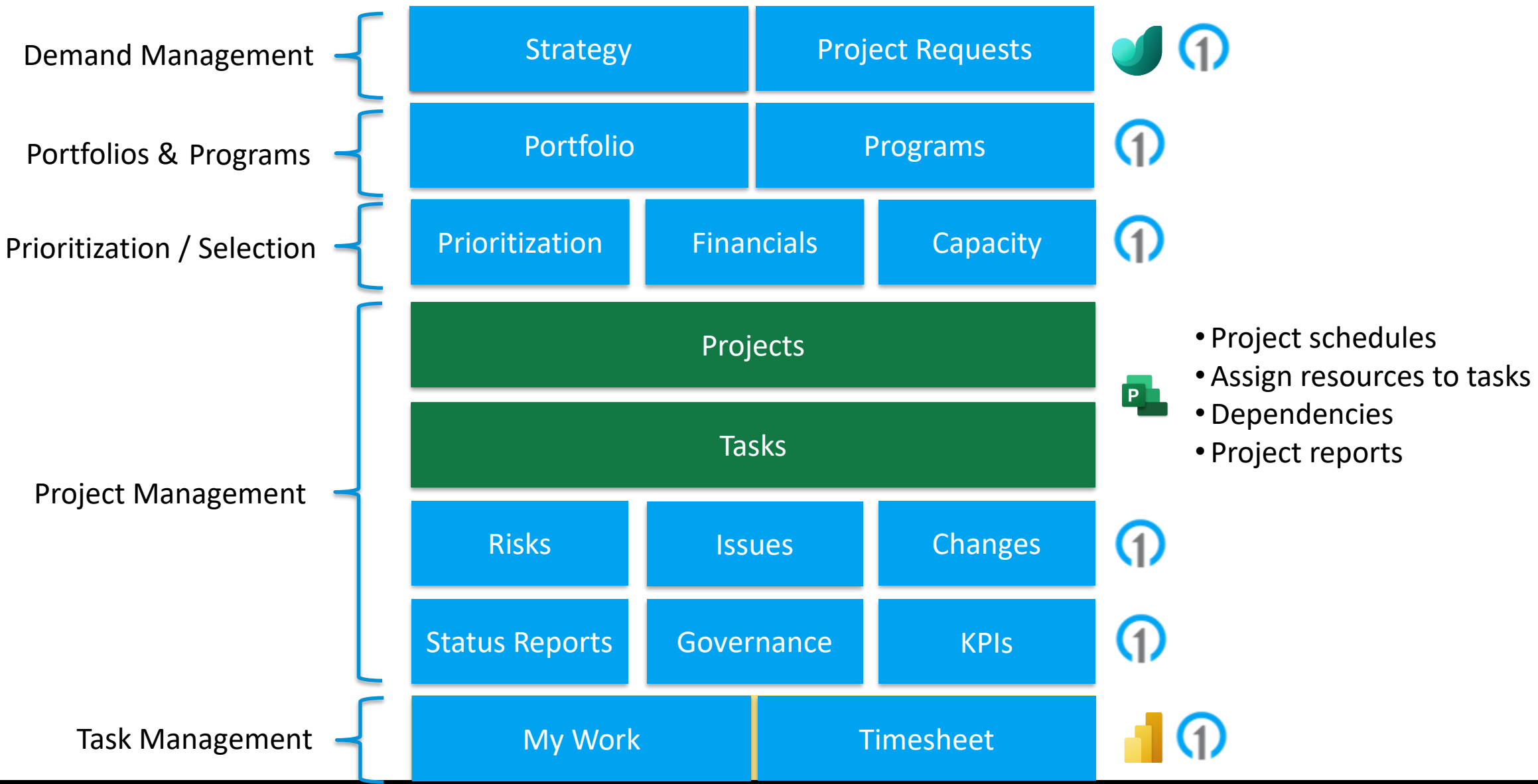


Gartner®

OnePlan Extends Accelerator to Achieve Full Adaptive PPM

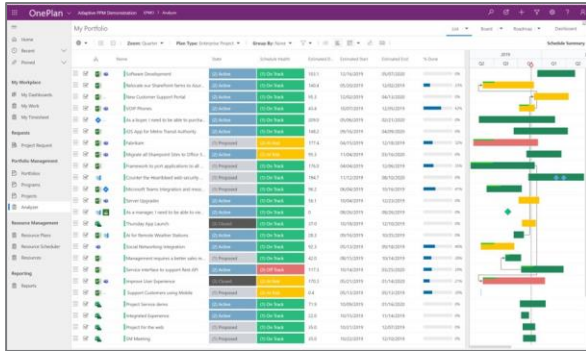


OnePlan Platform Adds Complete Strategic Portfolio Management

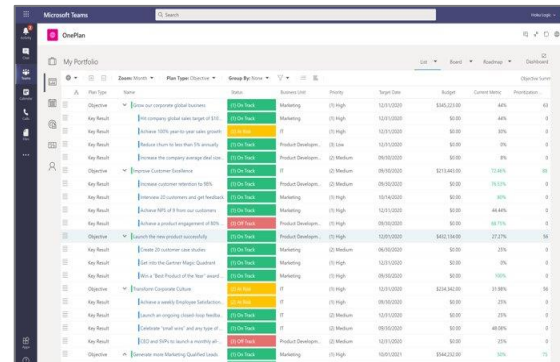


OnePlan

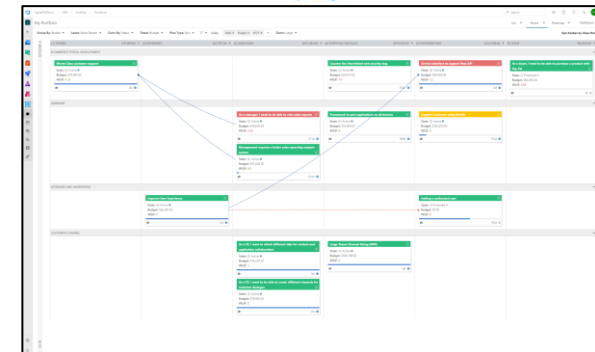
Fused into the tools that you work in everyday.



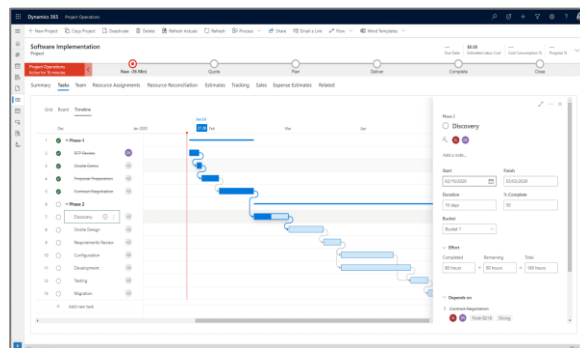
OnePlan in Power Apps



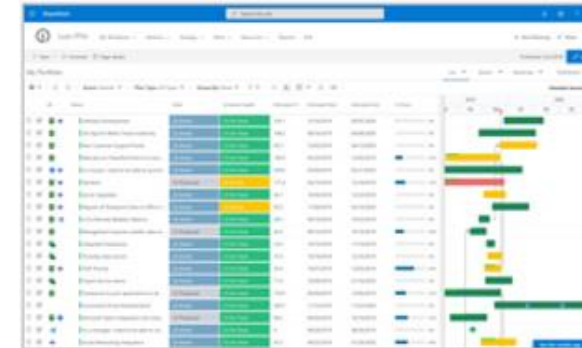
OnePlan in Teams



OnePlan in Azure DevOps



OnePlan in Dynamics 365



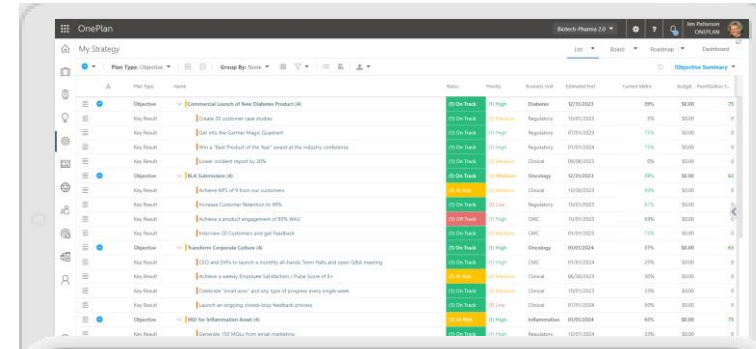
OnePlan in SharePoint

Comprehensive Solution for the Microsoft Cloud

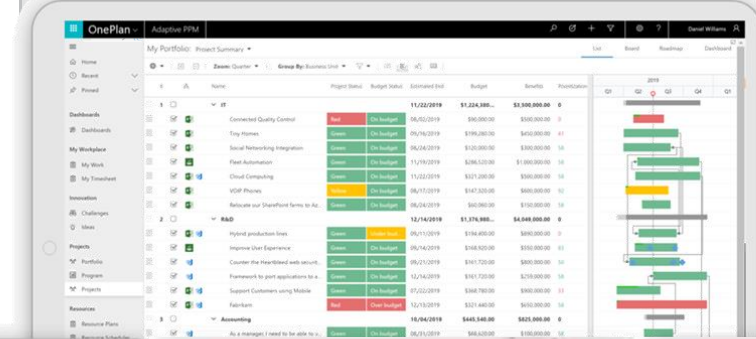


Connecting Strategy to Execution

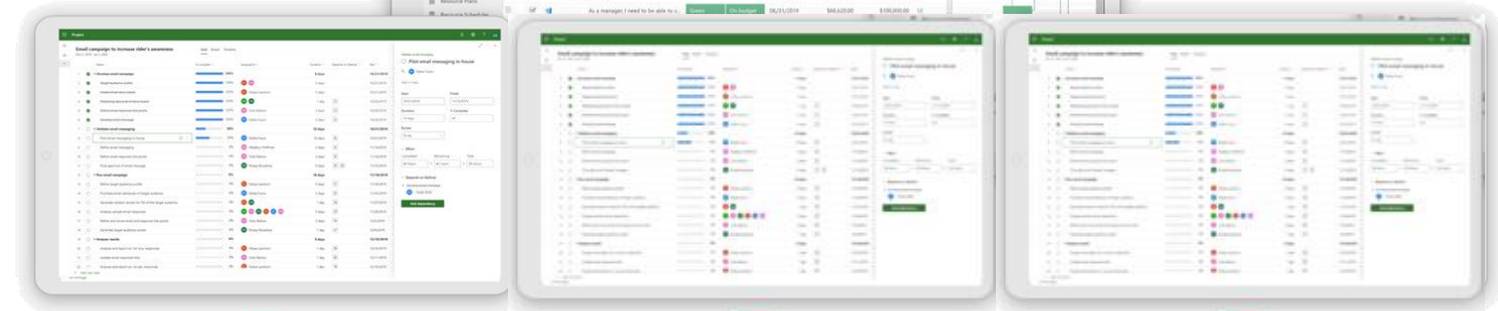
Strategy



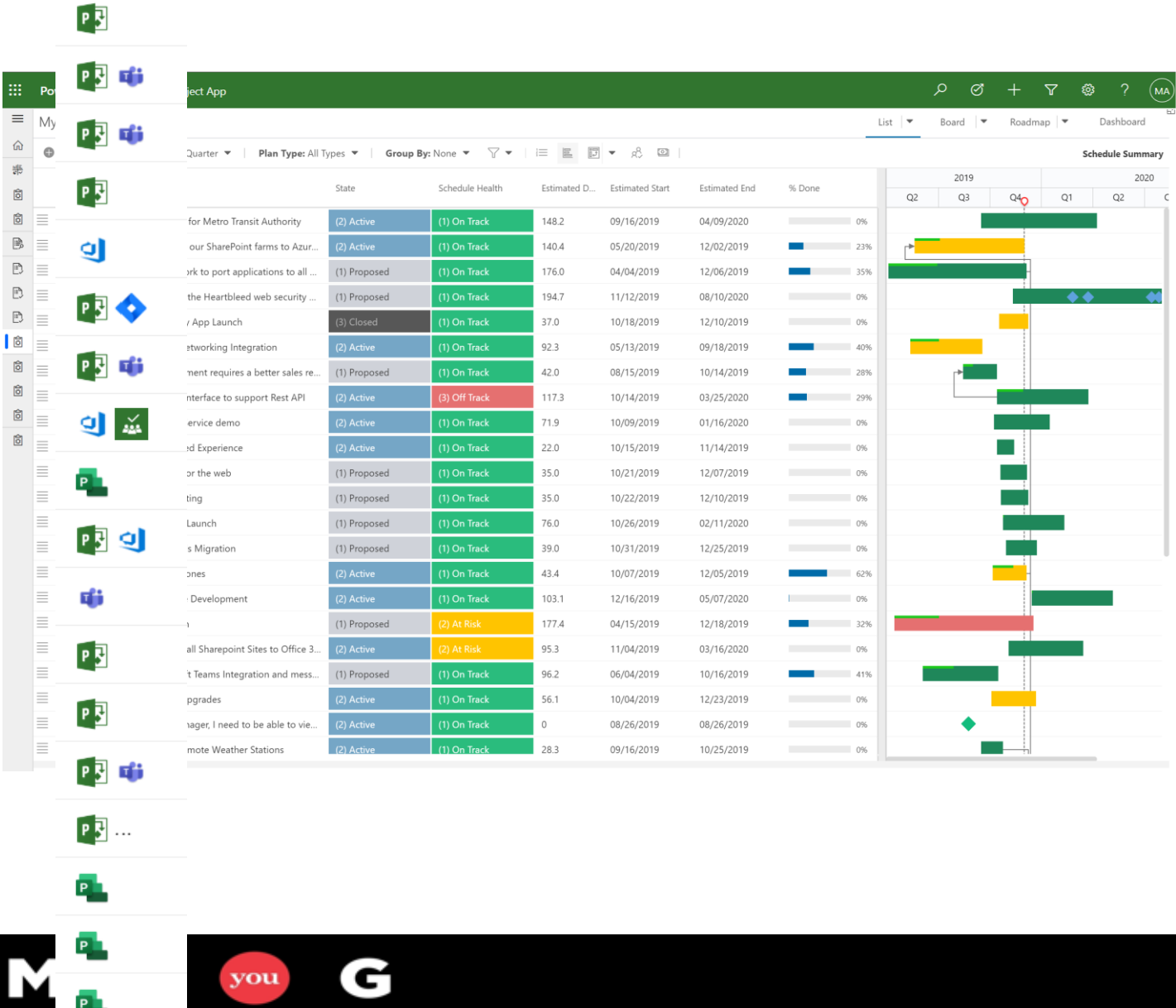
Portfolio



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

Power AppsModern Project App

My Portfolio

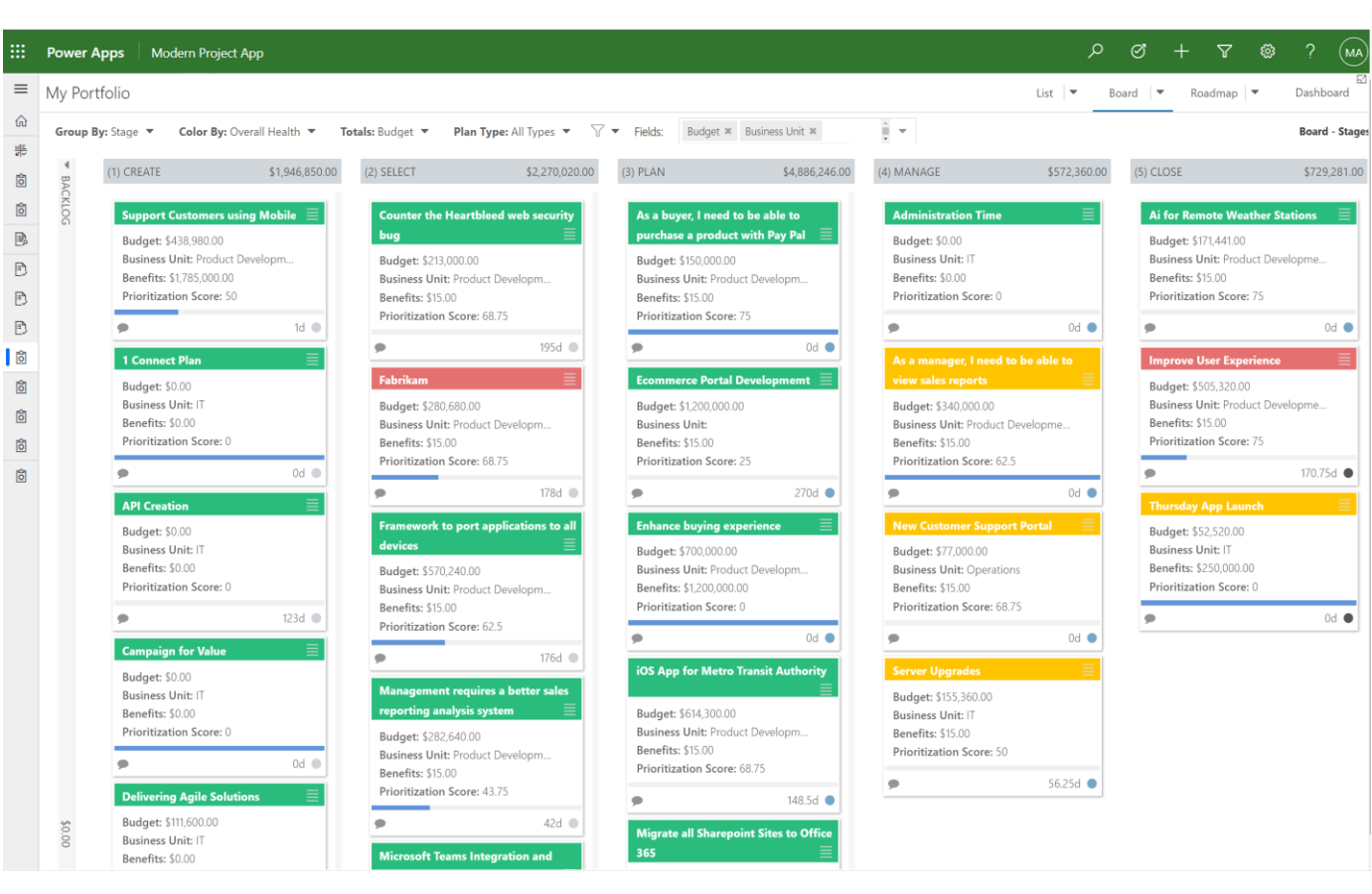
Zoom: MonthPlan Type: All TypesGroup By: None

	#		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 Development	(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			Immerse Itar Experience	(3) Closed	Extreme	Moderate	Strong	Moderate	75	\$505,370.00	\$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)

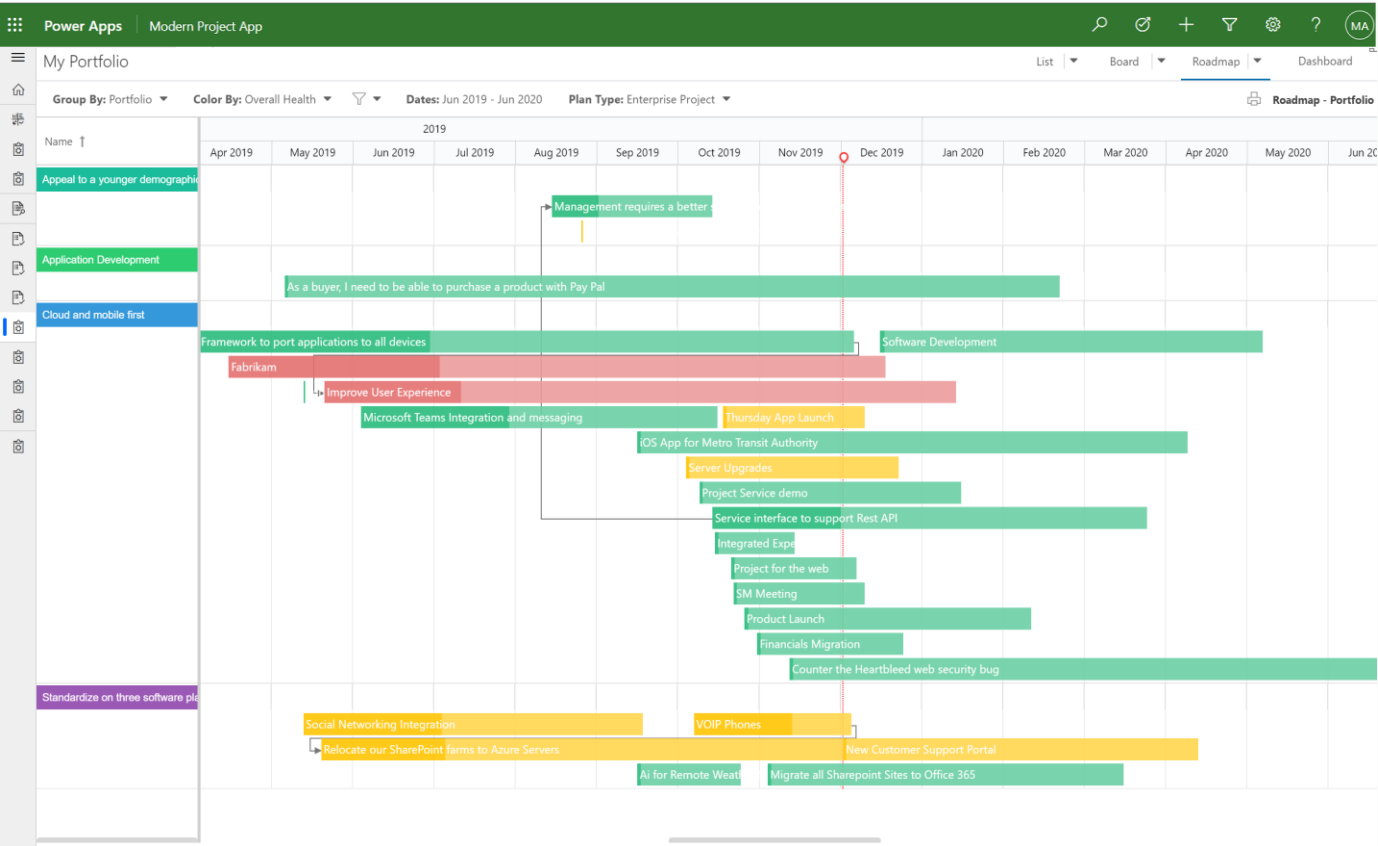


Deliver More Strategic Value

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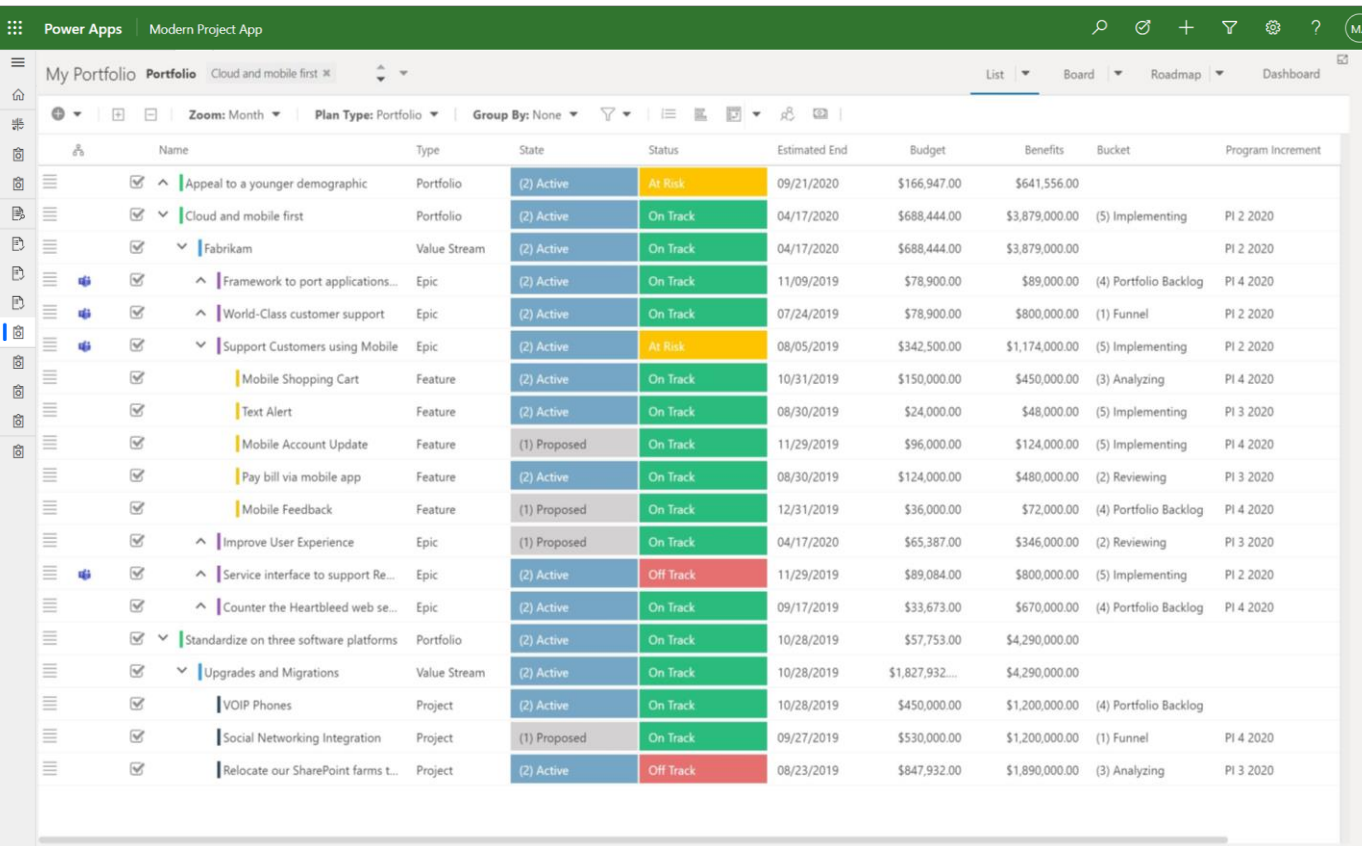
Portfolio Roadmaps



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



The screenshot displays the 'My Portfolio' interface in Power Apps. The top navigation bar includes 'Power Apps' and 'Modern Project App'. Below the navigation bar, there are tabs for 'List', 'Board', 'Roadmap', and 'Dashboard'. The main content area shows a hierarchical tree view of projects, with columns for Name, Type, State, Status, Estimated End, Budget, Benefits, Bucket, and Program Increment. The tree view shows a hierarchy starting with 'Appeal to a younger demographic', followed by 'Cloud and mobile first', 'Fabrikam', and then various features and projects.

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	\$1,827,932.00	\$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.



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.

Power Apps Modern Project App															
				Dates: Jun 2019 – May 2020											
	Resource	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
		Committed		Committed...	Committed...	Committed...	Committed...	Committed...	Committed...	Committed...	Committed...	Committed...	Committed...	Committed...	Committed...
	▼ Adam Barr			31.25	27.17	28.41	29.76	27.17	29.76	72.73	78.26	31.25	28.41	28.41	29.76
	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	29.76
	▼ Adam Noshimuri			36.36	36.36	36.36	36.36	36.36	36.36	50.00	48.42	83.64	104.55	107.28	132.69
	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	63.64
	Migrate all Sharepoint Sites...		7.26							13.64	13.64	13.64	13.64	13.64	19.05
	Server Upgrades		8.88										27.27	30.00	50.00
	▶ Amy Cornell				43.48	59.09	50.00	65.22	80.95	13.64	32.61	100.00	213.64	222.73	142.86
	▶ Business Analyst			55.00	47.83	50.00	100.00	146.20	111.31	115.34	240.22	221.25	96.59	96.59	53.57
	▶ Daniel Williams			47.19	49.73	24.72	103.27	375.82	751.49	346.31	96.11	85.52	77.75	123.20	81.45
	▶ Developer			50.00	70.43	114.55	158.10	208.70	433.33	709.09	833.70	568.75	221.59	245.64	500.20
	▶ Erwin Zischka			27.19	23.64	24.72	29.76	113.06	113.99	347.44	184.51	187.19	138.35	42.90	102.08
	▶ Grace Williams			30.00	77.72	185.80	56.55	147.83	213.69	126.70	129.89	74.38	76.70	49.43	51.79
	▶ Hatim Alad			48.94	42.55	44.49	46.61	77.34	170.42	112.67	133.86	48.94	44.49	44.49	46.61
	▶ Kono Kalakaua			100.00	204.35	254.55	39.29	270.11	609.52	196.02	48.37	15.63	14.20	14.20	14.88
	▶ Lisa Andrews				34.78	54.55	114.29	34.78	38.10			100.00	31.82	36.36	38.10
	▶ Lori Weston			110.00	160.87	157.95	79.76	52.17						54.55	38.10
	▶ Patrick Sands				34.78	54.55	57.14	121.74	33.33	204.55	226.09	40.00			38.10
	▶ Project Manager			290.00	104.35	100.00	236.90	169.20	159.13	175.76	107.61	25.00	38.64	52.27	25.00
	▶ Sophia King			70.00	60.87		66.67	60.87	57.14	63.64					
	▶ Steve Masters			33.33	28.98	30.30	31.74	28.98	31.74	30.30	28.99	33.33	30.30		
	▶ Support			52.00	65.22	148.86	32.14			72.73	226.09	61.25	49.43	30.68	
	▶ Wo Fat			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 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.

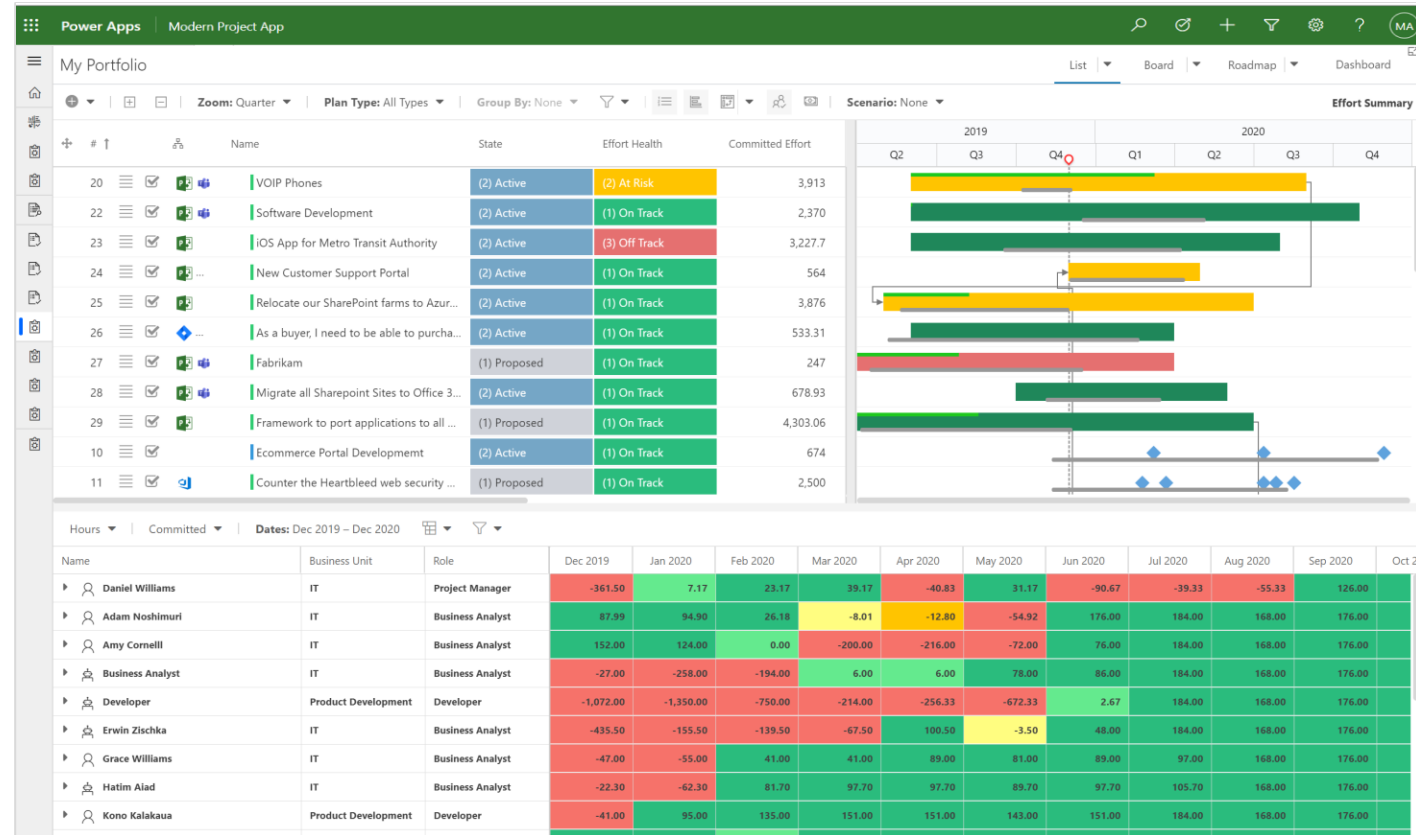
Power Apps Modern Project App													
		Dates: Jun 2019 – May 2020											
	Resource	Totals											
		Committed											
		Jun 2019	Jul 2019	Aug 2019	Sep 2019	Oct 2019	Nov 2019	Dec 2019	Jan 2020	Feb 2020	Mar 2020	Apr 2020	May 2020
		Committ...	Committ...	Committ...	Committ...	Committ...	Committ...	Committ...	Committ...	Committ...	Committ...	Committ...	Committ...
...	▼ Adam Barr	31.25	27.17	28.41	29.76	27.17	29.76	72.73	78.26	31.25	28.41	28.41	29.76
...	VOIP Phones	31.25	27.17	28.41	29.76	27.17	29.76	72.73	78.26	31.25	28.41	28.41	29.76
...	▼ Adam Noshimuri	36.36	36.36	36.36	36.36	36.36	36.36	50.00	48.42	83.64	104.55	107.28	132.69
...	Framework to port applicat...	36.36	36.36	36.36	36.36	36.36	36.36	36.36	34.78	70.00	63.64	63.64	63.64
...	▼ Migrate all Sharepoint Sites...							13.64	13.64	13.64	13.64	13.64	19.05
...	Proposed												
...	Committed												
...	Amy Cornelli										27.27	30.00	50.00
...	▶ Business Analyst		43.48	59.09	50.00	65.22	80.95	13.64	32.61	100.00	213.64	222.73	142.86
...	▶ Daniel Williams	55.00	47.83	50.00	100.00	146.20	111.31	115.34	240.22	221.25	96.59	96.59	53.57
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...	▶ Support	33.33	28.98	30.30	31.74	28.98	31.74	30.30	28.99	33.33	30.30		
...	▶ Wo Fat	50.00	65.22	148.86	32.14			72.73	226.09	61.25	49.43	30.68	
...	▶ Yukari Kemmotsu	75.00	86.96	68.18	123.81	165.22	104.76	44.32	34.78	75.00	95.45	68.18	
...		15.00	13.04	13.64	14.29	13.04	52.38	36.36	182.61	185.00	72.73		

Resource Negotiation

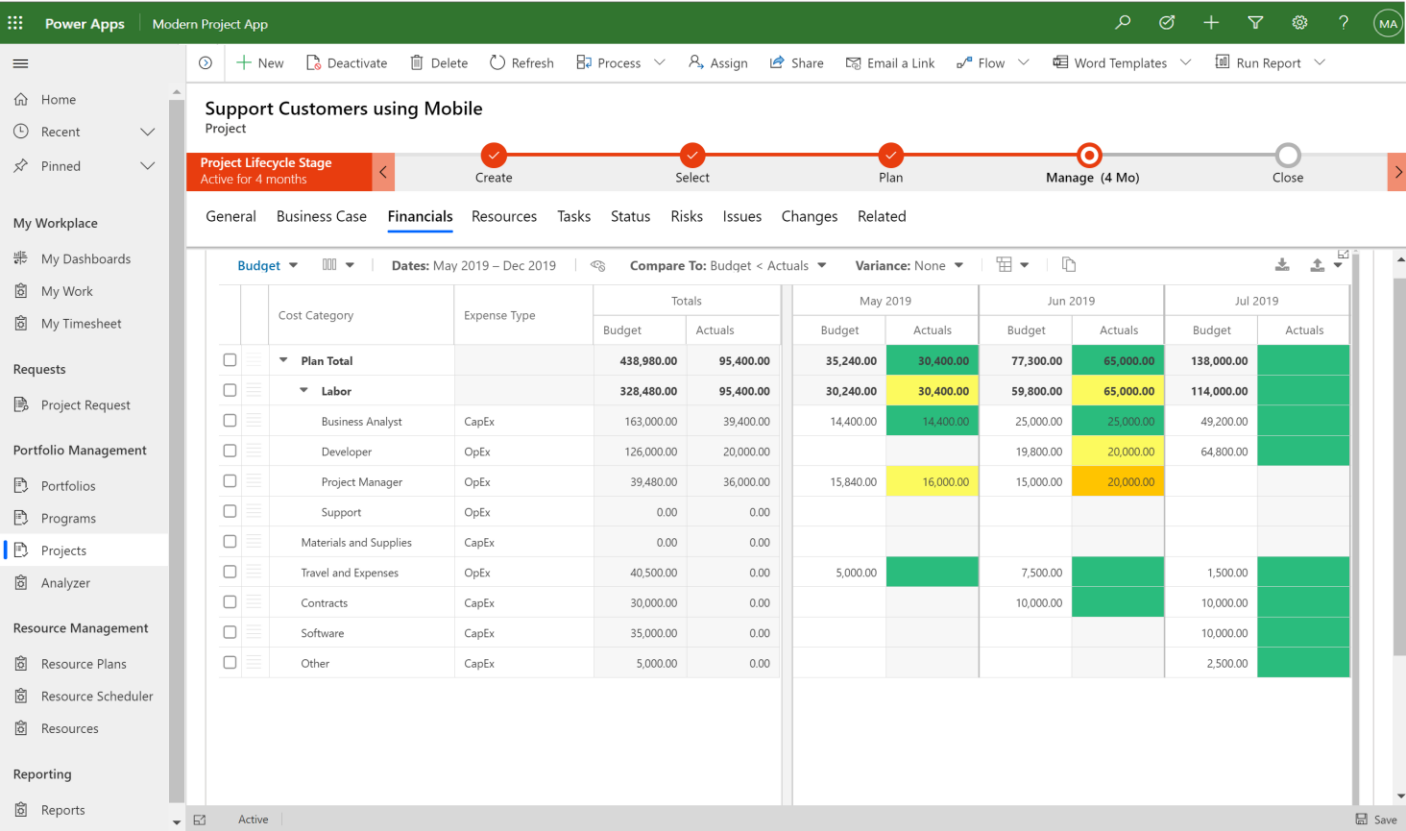
Resource Prioritization

Increase Resource Workload Transparency

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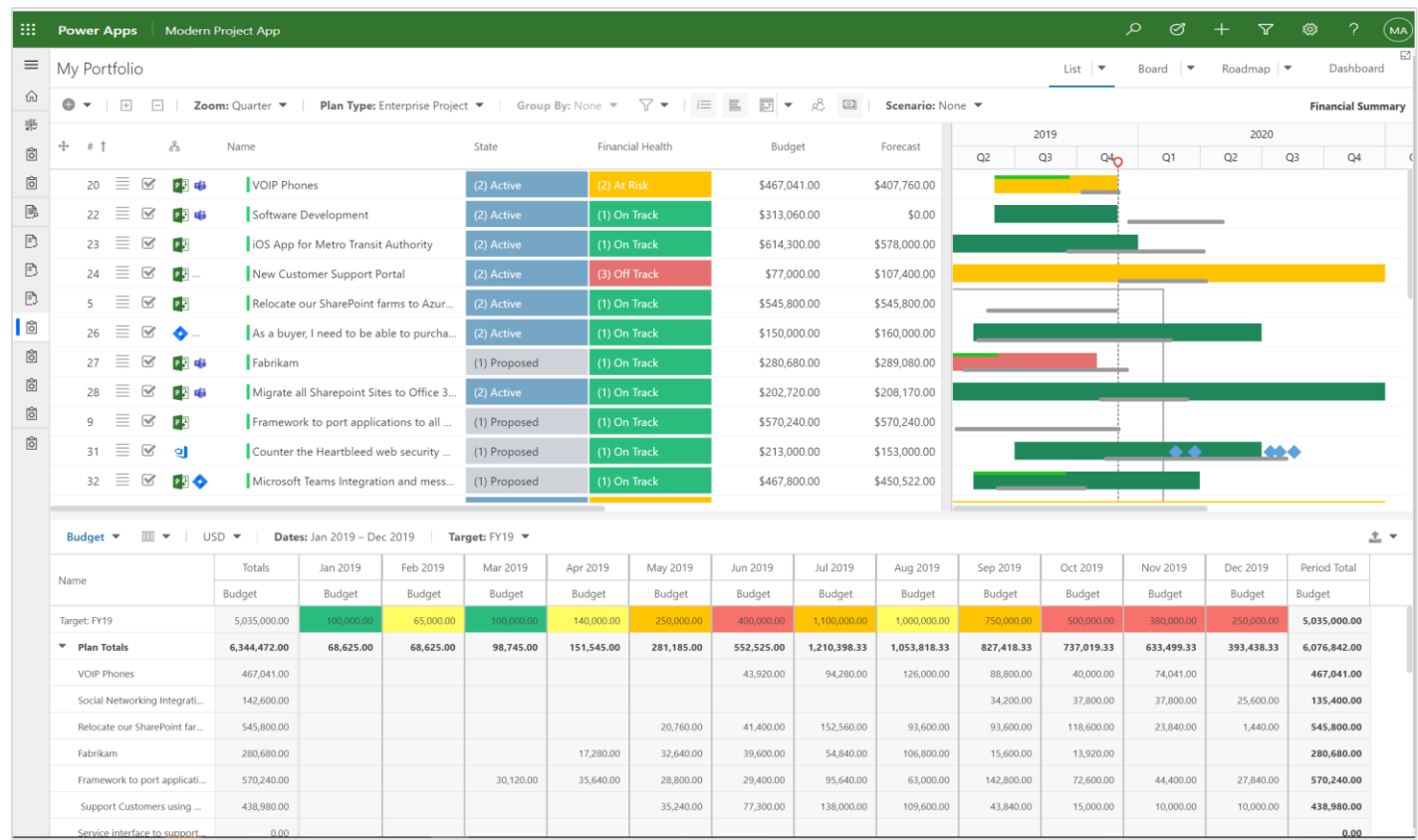
Financial Planning



Optimize Financial Investments

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

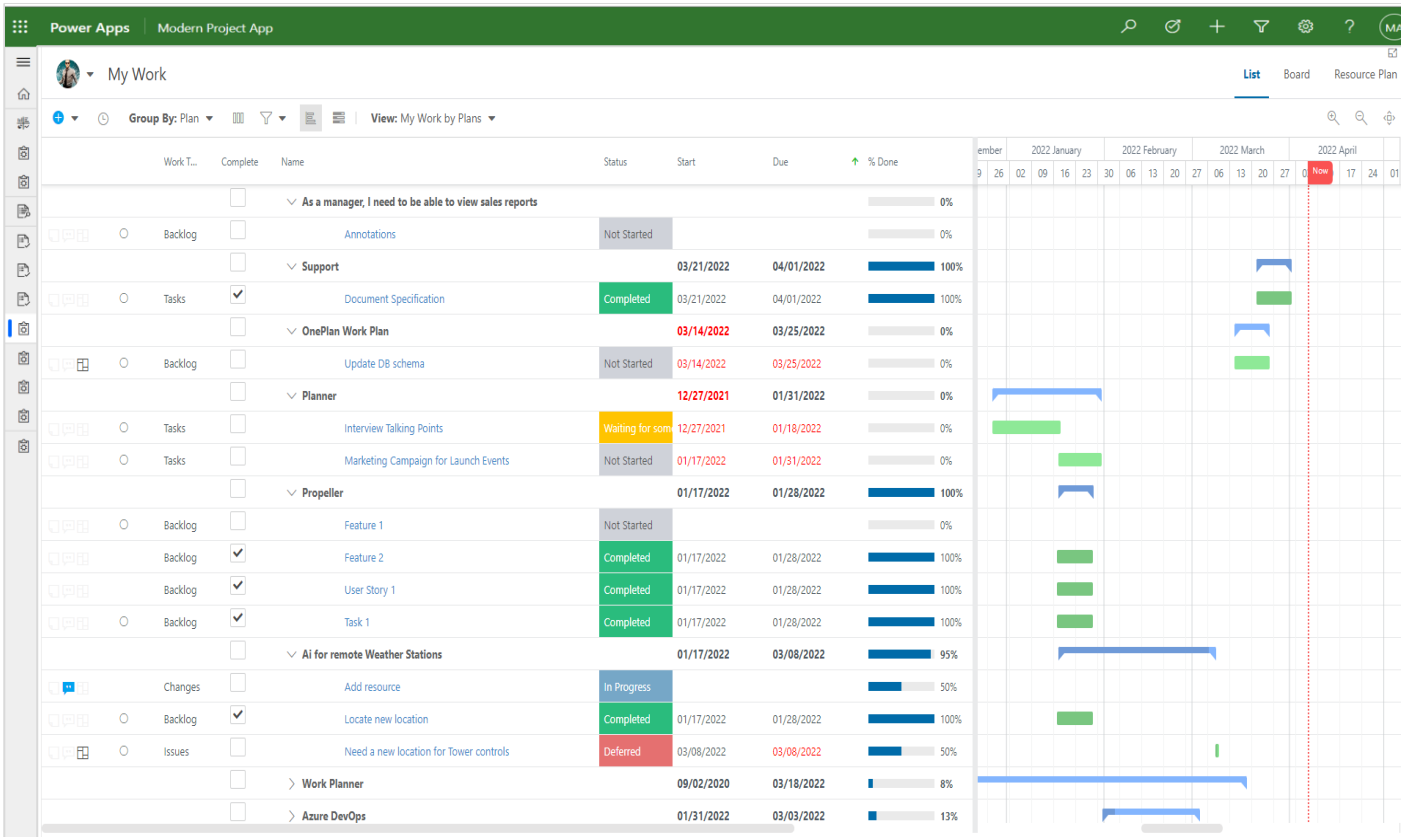
Financial Prioritization



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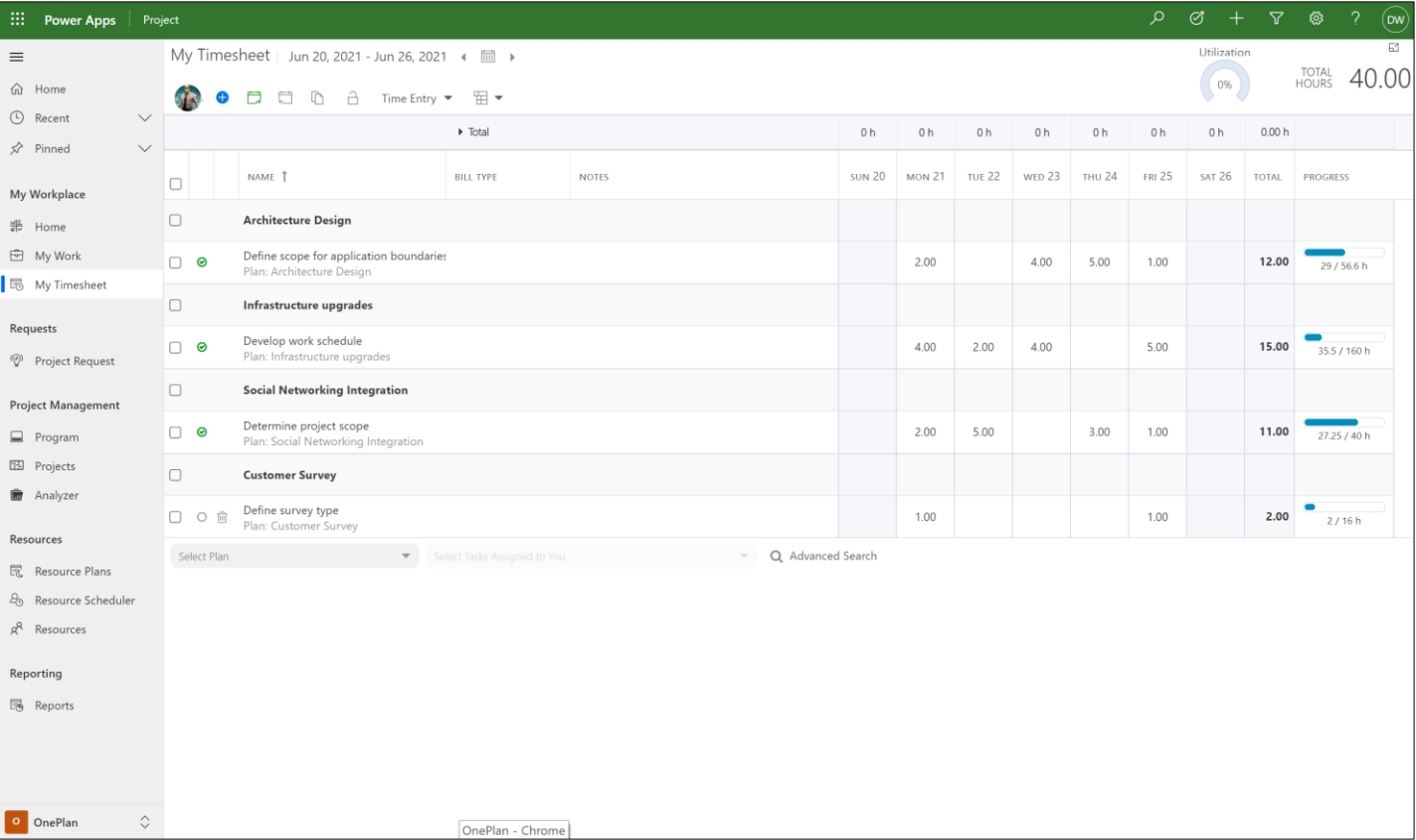
My Work



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.

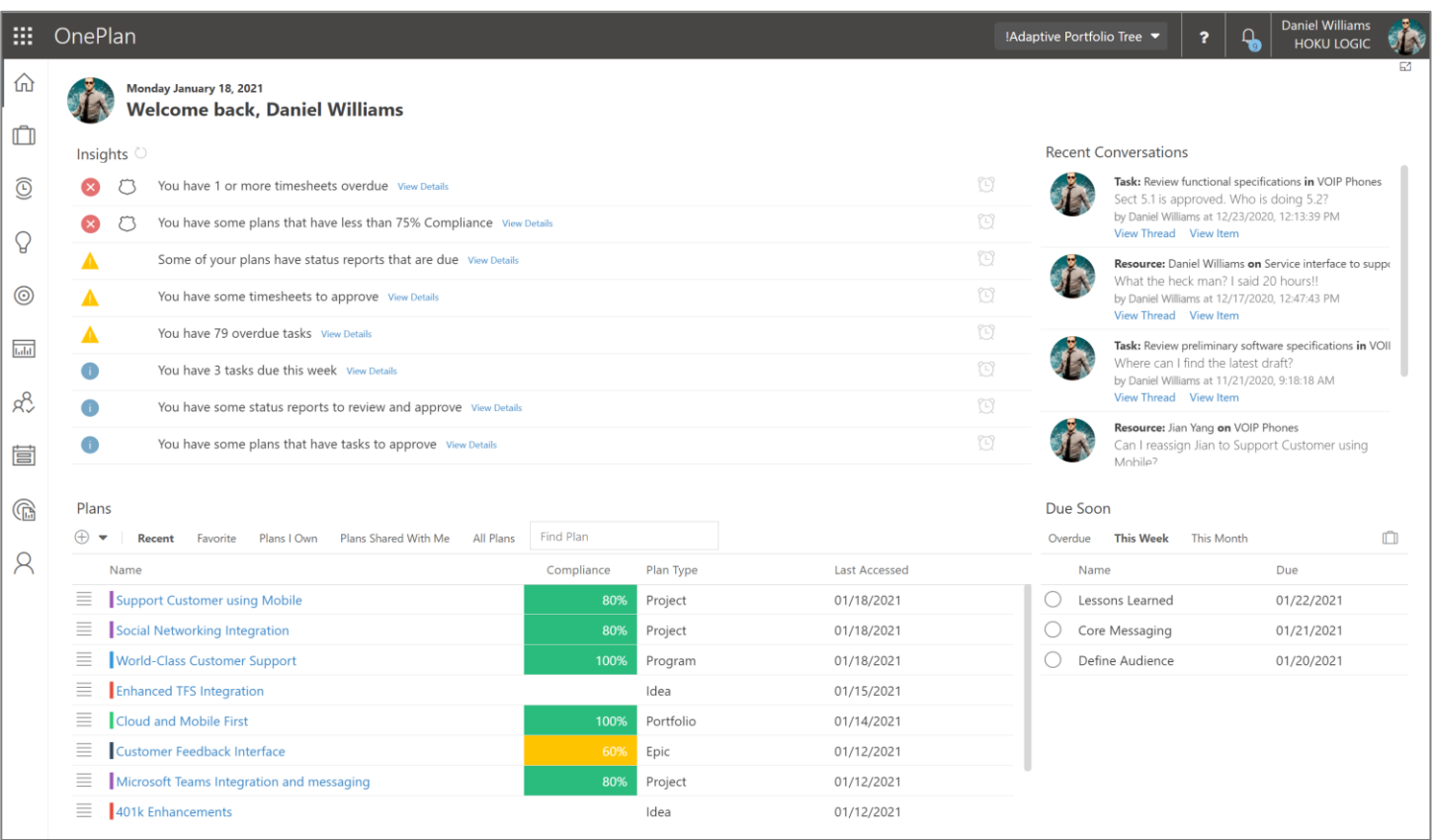
Timesheets



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.

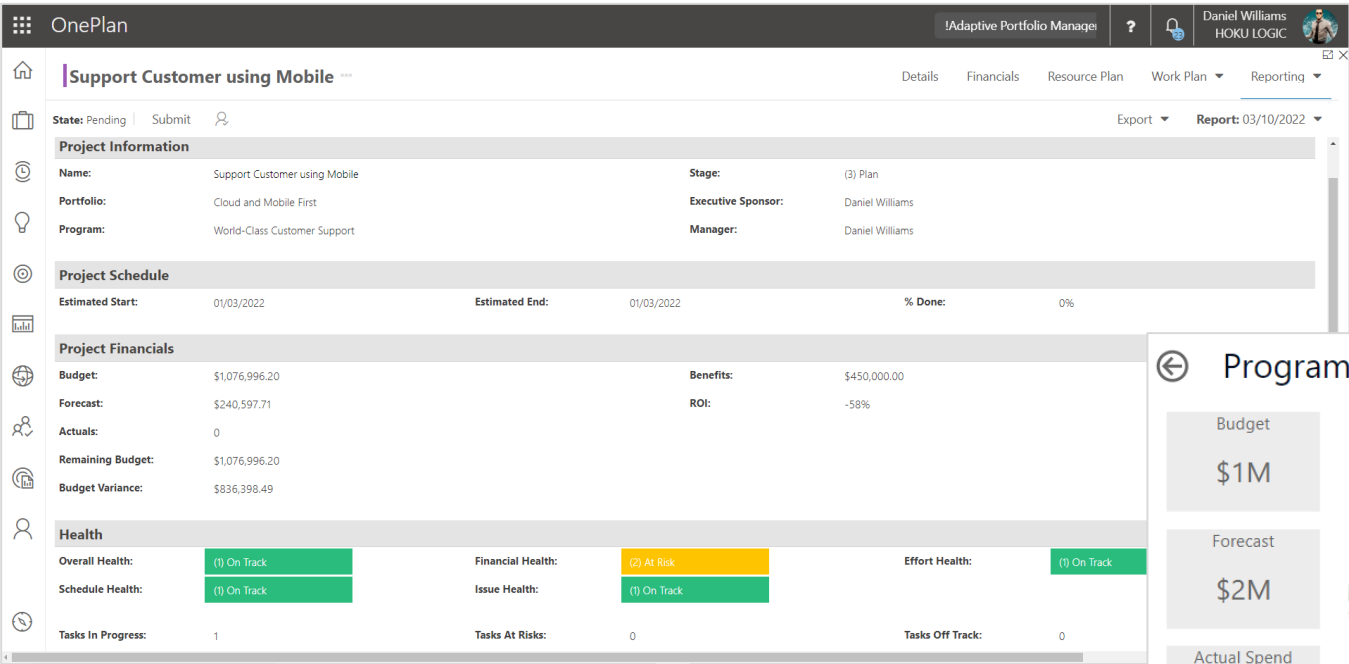
Insights and AI



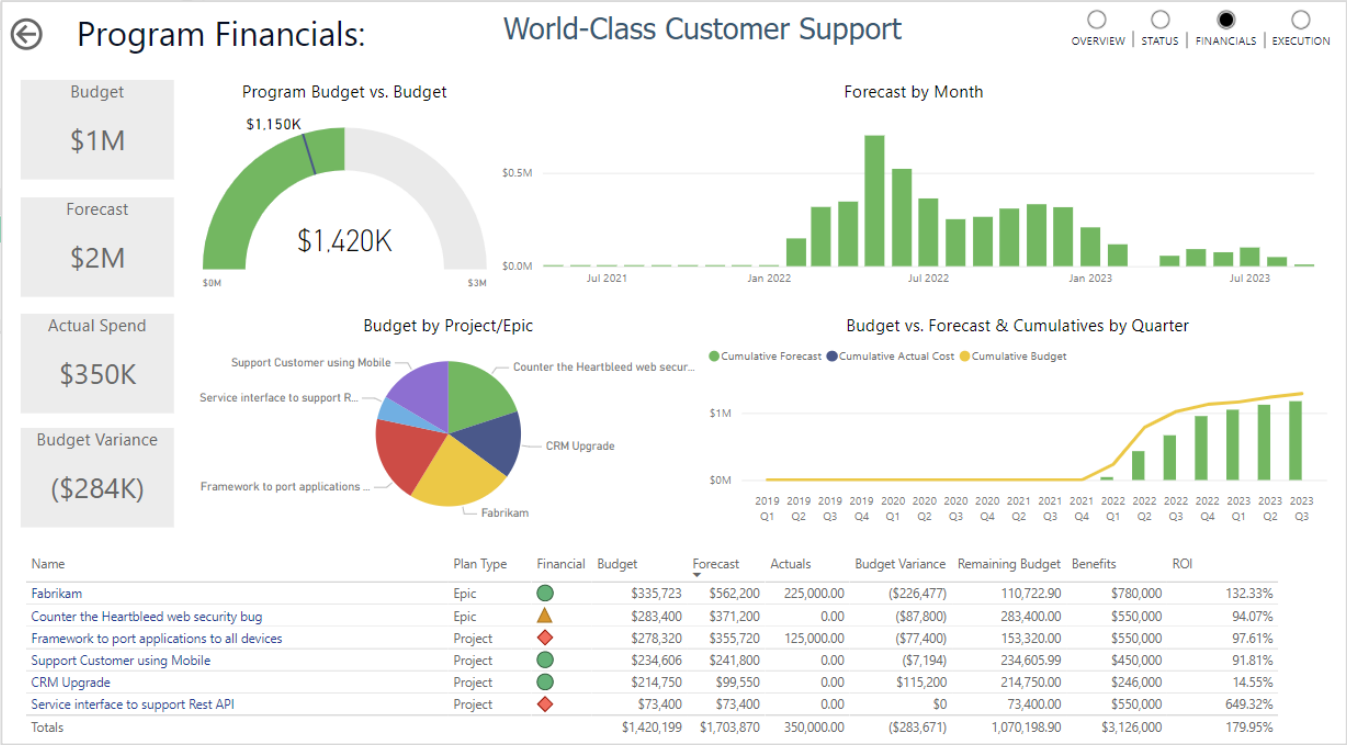
Improve Data Accuracy and Team Productivity with OnePlan's Insights AI

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



Dashboard & Analytics

OnePlan Integrations

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

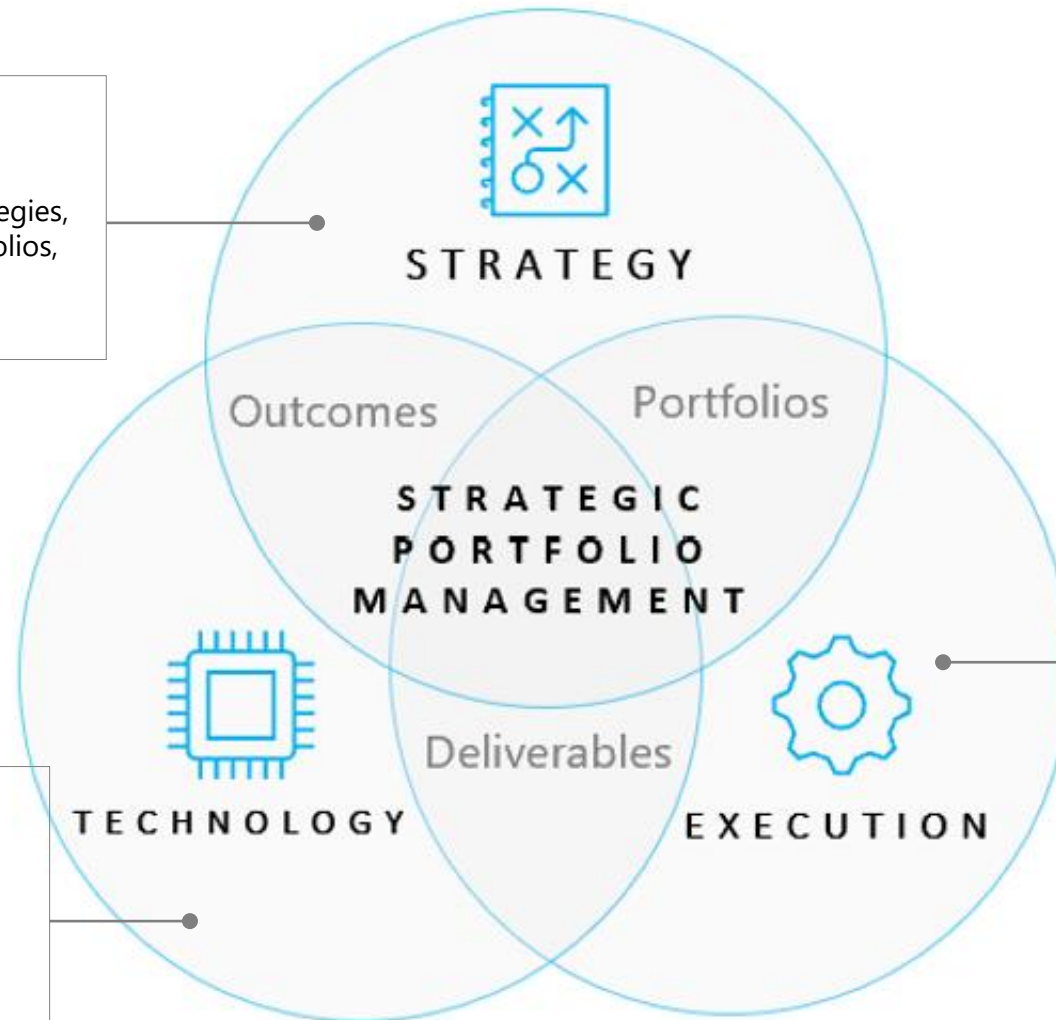


The Move to Strategic Portfolio Management (SPM)

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



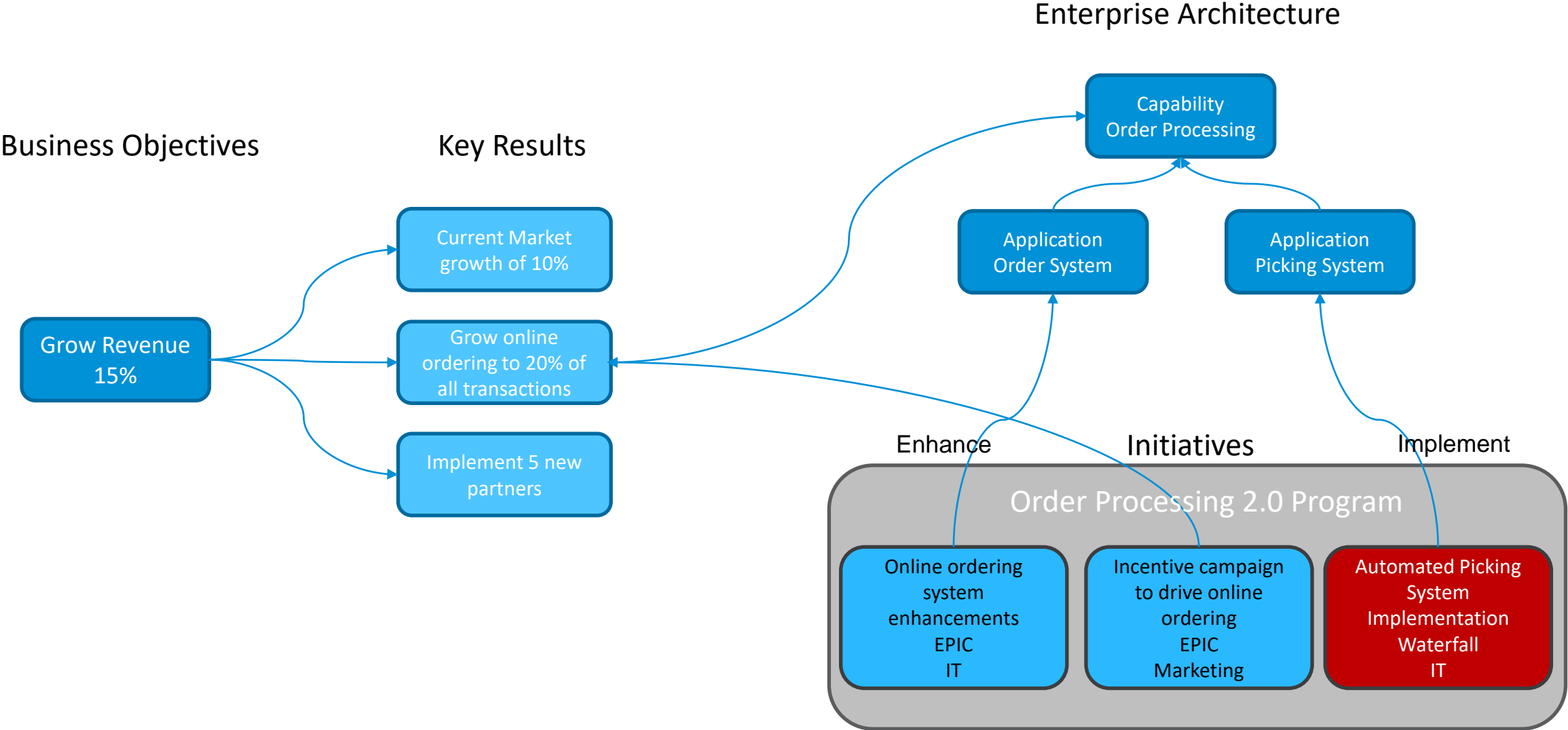
EXECUTION LEADERS

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

OnePlan

!Strategic Portfolio

My Strategy

List Board Roadmap Dashboard

Plan Type: Objective Zoom: Month Group By: None

Name	Plan Type	Status	Priority	Business Unit	Estimated End	Current Metric	Budget	Prioritization S...
Launch The New Product Successfully (3)	Objective	(1) On Track	(1) High	Product Develop	12/31/20	83%	\$620,000.00	75
Create 20 customer case studies	Key Result	(1) On Track	(2) Medium	Marketing	10/01/21	100%	\$200,000.00	0
Get into the Gartner Magic Quadrant	Key Result	(1) On Track	(1) High	Marketing	07/01/21	75%	\$300,000.00	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
Improve Customer Excellence (4)	Objective	(2) At Risk	(2) Medium	IT	12/30/21	78%	\$0.00	63
Achieve NPS of 9 from our customers	Key Result	(2) At Risk	(2) Medium	IT	12/30/21	89%	\$0.00	0
Increase Customer Retention to 98%	Key Result	(1) On Track	(3) Low	Marketing	10/01/21	81%	\$0.00	0
Achieve a product engagement of 80% WAU	Key Result	(3) Off Track	(1) High	Product Develop	10/01/21	69%	\$0.00	0
Interview 20 Customers and get Feedback	Key Result	(1) On Track	(2) Medium	Product Develop	01/01/22	75%	\$0.00	0
Transform Corporate Culture (4)	Objective	(2) At Risk	(1) High	IT	06/30/22	37%	\$0.00	63
CEO and SVPs to launch a monthly all-hands To	Key Result	(1) On Track	(1) High	Product Develop	01/01/22	25%	\$0.00	0
Achieve a weekly Employee Satisfaction / Pulse	Key Result	(2) At Risk	(2) Medium	IT	06/30/21	50%	\$0.00	0
Celebrate "small wins" and any type 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
Generate More Marketing Qualified Leads (4)	Objective	(1) On Track	(1) High	Marketing	01/01/22	43%	\$0.00	75

Strategic Plan

OnePlan

!Strategic Portfolio

My Enterprise Architecture

List Dashboard

Plan Type: 6 Types Zoom: Month Group By: Element

Name	Plan Type	EA-Strategy	State	Strategic Align...	Lower Cost	Improve Emplo...	Risk Reduction	Prioritization S...	B...
Products (3)									\$25,000.00
Cloud Marketplace	Products	Current Architect	Proposed		Not Rated	Moderate	Low		
Customer Hub	Products	Current Architect	Proposed		Strong	Moderate	Low		\$15,000.00
ePayments	Products	Current Architect	Proposed		Extreme	None	Strong	63	\$10,000.00
Organization (1)									
OnePlan	Organization	Current Architect	Proposed		Not Rated	Not Rated	Not Rated	0	
Application (6)									\$1,400.00
Monetary Sys RB # 2.0	Application	Target Architect	On Hold	Extreme	Low	Extreme	Strong	75	\$500.00
Account-Sys RB # 3.2	Application	Target Architect	Proposed	Strong	Moderate	Low	Moderate	50	\$100.00
CRM RB# 3.2	Application	Target Architect	Active	Low	Low	Not Rated	Not Rated	13	\$300.00
HCM Stack	Application	Target Architect	Active	Strong	Strong	Extreme	Low	69	\$250.00
CRM RB # 3.1	Application	Current Architect	Closed	Low	Low	Low	Low	25	\$100.00
Account-Sys RB # 3.1	Application	Current Architect	Active	Low	Low	Low	Low	25	\$150.00
Capability (9)									\$950.00
Value Stream (2)									\$3,500.00

Enterprise Architecture

OnePlan

!Strategic Portfolio

My Portfolio

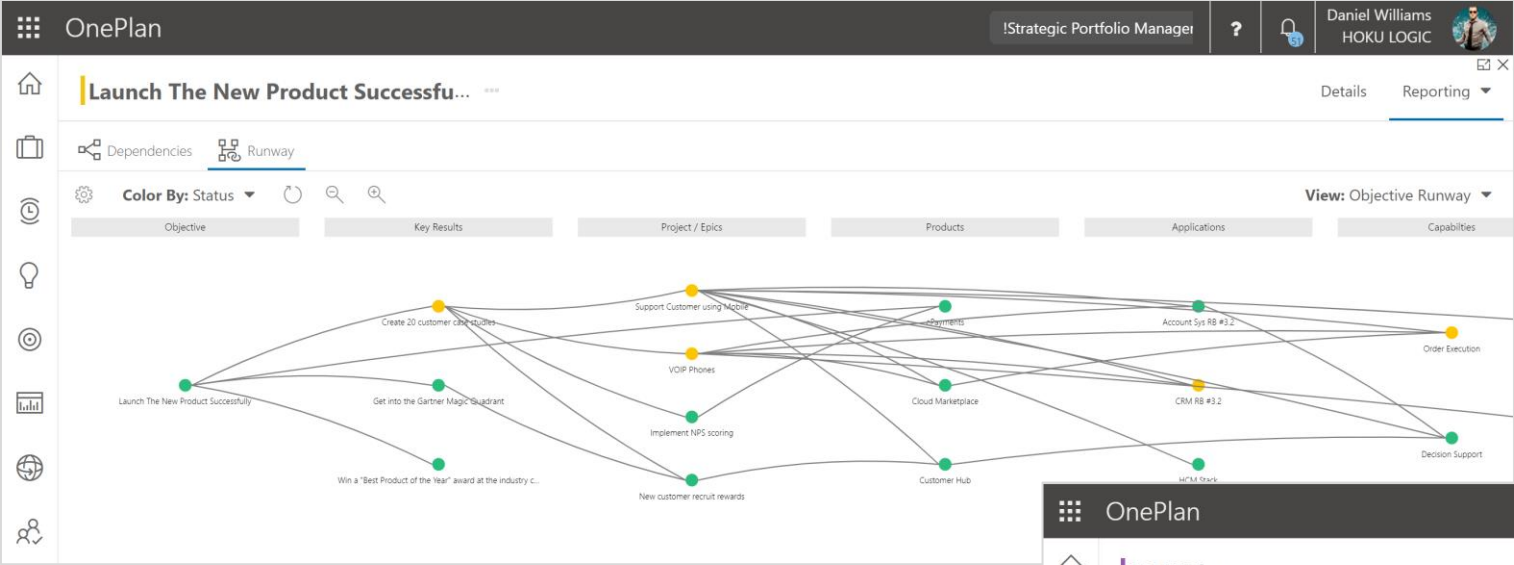
List Board Roadmap Dashboard

Plan Type: 2 Types Zoom: Month Group By: Program

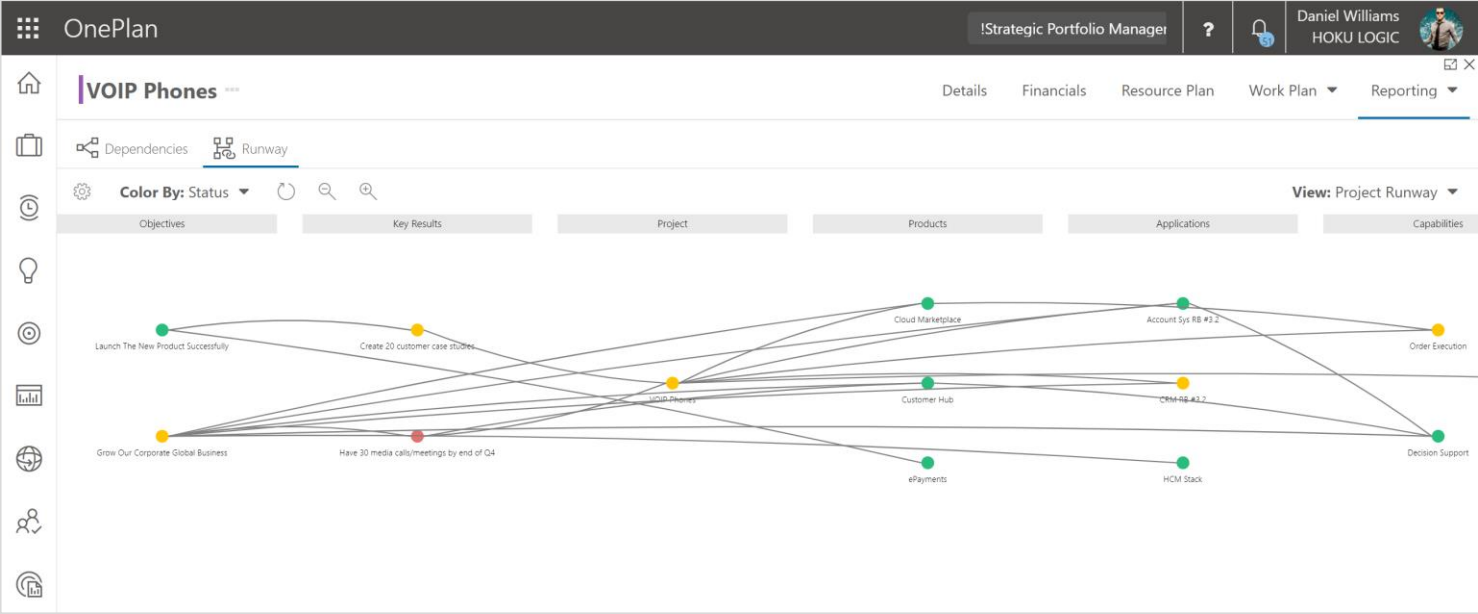
Name	Plan Type	State	Overall Health	Schedule Health	Financial Health	Effort Health	Issue Health	Budget	B...
World-Class Customer Support (8)									\$1,986,673.00 \$3,839,950.00
Support Customer using Mobile	Project	Active	(1) On Track	(1) On Track	(1) On Track	(1) On Track	(1) On Track	\$717,594.00	\$900.00
Framework to port applications to all dev	Project	Active	(3) Off Track	(1) On Track	(1) On Track	(1) On Track	(1) On Track	\$420,160.00	\$559.95
Service interface to support Rest API	Project	On Hold	(1) On Track	(1) On Track	(1) On Track	(1) On Track	(1) On Track	\$253,920.00	\$550.00
Fabrikam	Epic	Active	(1) On Track	(1) On Track	(1) On Track	(1) On Track	(1) On Track	\$225,000.00	\$780.00
Counter the Heartbleed web security bug	Epic	Proposed	(1) On Track	(1) On Track	(1) On Track	(1) On Track	(1) On Track	\$45,000.00	\$550.00
TestDates	Project	Proposed	(1) On Track	(1) On Track	(1) On Track	(1) On Track	(1) On Track	\$175,000.00	\$250.00
ScrumProject	Project	Active	(1) On Track	(1) On Track	(1) On Track	(1) On Track	(1) On Track	\$150,000.00	\$250.00
New Product Launch	Project	Proposed	(1) On Track	(1) On Track	(1) On Track	(1) On Track	(1) On Track	\$0.00	
Improve Infrastructure (6)									\$1,767,787.00 \$3,408,900.00
VOIP Phones	Project	On Hold	(2) At Risk	(1) On Track	(1) On Track	(1) On Track	(1) On Track	\$372,750.00	\$1,200.00
Microsoft Teams Integration and messag	Project	Active	(1) On Track	(1) On Track	(1) On Track	(1) On Track	(1) On Track	\$267,985.00	\$500.00
AI for remote Weather Stations	Project	Proposed	(1) On Track	(1) On Track	(2) At Risk	(1) On Track	(3) Off Track	\$527,333.33	\$580.00
Server Upgrades	Project	Proposed	(1) On Track	(1) On Track	(1) On Track	(1) On Track	(1) On Track	\$599,720.00	\$1,128.90
EAM Rollout	Project	Proposed	(1) On Track	(1) On Track	(1) On Track	(1) On Track	(1) On Track	\$0.00	

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



The screenshot shows the OnePlan Modeler interface for 'IT 2022 Planning'. It includes a top navigation bar with the OnePlan logo, a user profile for Daniel Williams, and a 'Strategic Portfolio Manager' button. The main area displays a table of initiatives with columns for Name, Estimated Start, Estimated End, Benefits, Budget, Associated Key Results, Associated Applications, and Associated Products. A summary table at the bottom compares two scenarios: '\$5M Budget' and '\$4.5M Budget'.

Name	Total In	Target Budget	Total Budget	Target Benefits	Total Benefits
\$5M Budget	16	\$5,000,000.00	\$4,821,202.33	\$13,000,000.00	\$14,466,666.67
\$4.5M Budget	14	\$4,500,000.00	\$4,423,528.33	\$13,000,000.00	\$12,856,666.67

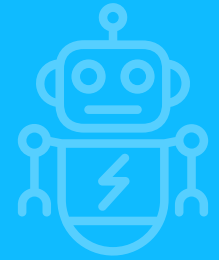
What-if Scenario Modeling

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 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.

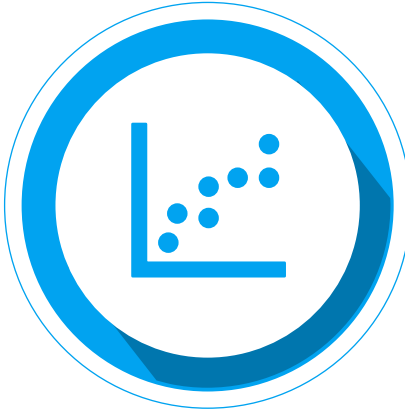


Sample Use Cases for AI in Strategic Portfolio Management



Strategic Planning

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



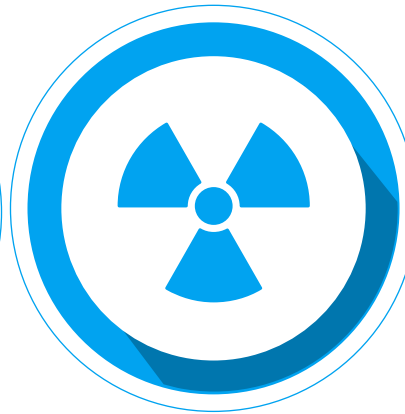
Portfolio Optimization

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



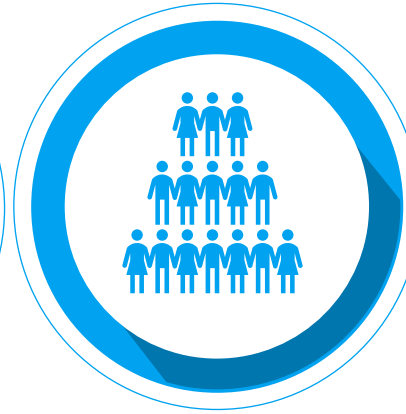
Work Management

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

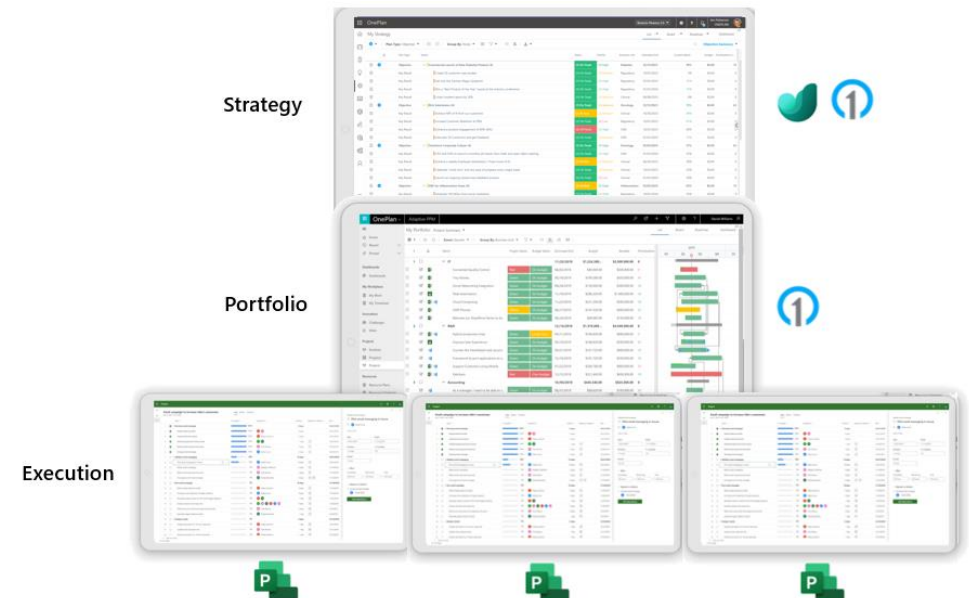
Summary

- 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



A Modern Solution That
Extends Beyond Project Online





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**



Project & Portfolio
Management



Collaboration &
Content



Cloud Productivity



Cloud Platform



Data Analytics



OnePlan recognized in the Market Guide for
Collaborative Work Management



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



mpug.com

From 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.

Migration Complexity	
Understood with available tools	_____
Moderate change in user experience	_____
Complex and potential loss of functionality	_____

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



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.

Migration Complexity

Understood with available tools

Moderate change in user experience

Complex and potential loss of functionality

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



(OnePlan Partner)

pdms.io *preview* Provision Scenarios Templates Projects Sync History R Figueroa ▾

Step 1 ☒ Step 2 ☐ Step 3 ☐ Step 4 ☐ Step 5 ☐ Step 6 ☐

Configure connection to the data source. Configure connection to the target environment. Review the data elements, define mappings. Review and define configuration mappings. Wait for the data copy process to complete. Data copy complete!

Migrate Projects from Project Online to Project for the web

Source

☐ Template ☒ Project Online ☐ Project for The Web

Authentication method

☐ Device (default and recommended) ☒ Login & Password

Login

Back Next

All Scenarios

pdms.io *preview* Provision Scenarios Templates Projects Sync History R Figueroa ▾

Step 1 ☒ Step 2 ☒ Step 3 ☒ Step 4 ☒ Step 5 ☒ Step 6 ☒

Configure connection to the data source. Configure connection to the target environment. Review the data elements, define mappings. Review and define configuration mappings. Wait for the data copy process to complete. Data copy complete!

Migrate Projects from Project Online to Project for the web

Scenario execution results

Status: Completed

Started: 12/26/2020, 6:11:52 PM

Finished: 12/26/2020, 6:33:26 PM

Source type: Project Online

Source URL: https://M365x923271.sharepoint.com/sites/pwa

Source User: MOD Administrator admin@M365x923271.onmicrosoft.com

Target type: Project for the Web

Target User: MOD Administrator admin@M365x493551.onmicrosoft.com

Custom Fields

Field	Status
Capitalize	Created

Support

Migration Workshop

Workshop Agenda

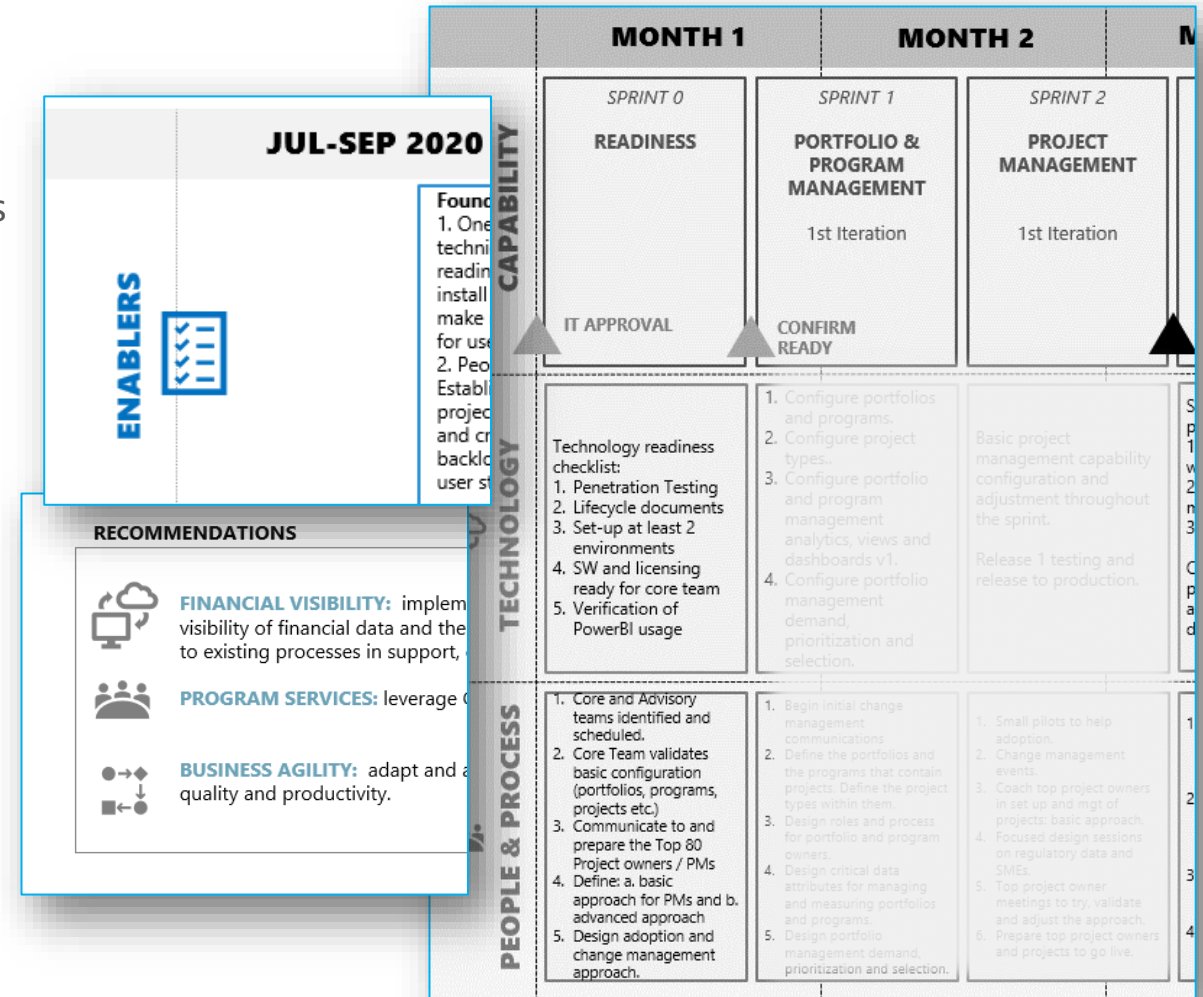
- Demonstration and discussion of the new technology options based on the Microsoft stack. Includes opportunities to leverage Microsoft Teams, Microsoft Power Platform, Project for the Web, Azure DevOps and OnePlan apps.
- Review your business objectives for portfolio and work management, including any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



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.

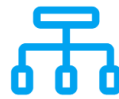


Strategic Portfolio Management

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

The screenshot displays the OnePlan software interface, titled "My Portfolio". It shows a list of strategic initiatives organized into a table. The table has columns for Plan Type, Name, Status, Business Unit, Lead, Priority, and Estimated End. The initiatives are categorized into Objectives and Key Results. The status of each initiative is indicated by a colored bar: green for "On Track", yellow for "At Risk", and red for "Off Track".

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	Erich 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	Erich Bachman	(1) High	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	Erich 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



- 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

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www.oneplan.ai

