

OnePlan

Introducing OnePlan The Future for Microsoft Project Users

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In partnership with



M P you G

OnePlan

Consistently Recognized as a Leader

OnePlan Recognized by Microsoft as a **Global PPM Leader for 5 Consecutive Years**



Project and Portfolio Management Winner



Project and Portfolio Management Finalist



Project and Portfolio Management Winner



Project and Portfolio Management Winner



Project and Portfolio Management Finalist



Gartner
OnePlan recognized in the Market Guide for Collaborative Work Management

INFO~TECH
RESEARCH GROUP
OnePlan cited as a top vendor in "Determine the Future of Microsoft Project in Your Organization"

3Most SR 2022 Reputable Companies of the Year



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>



Fresh new experience

Microsoft Project

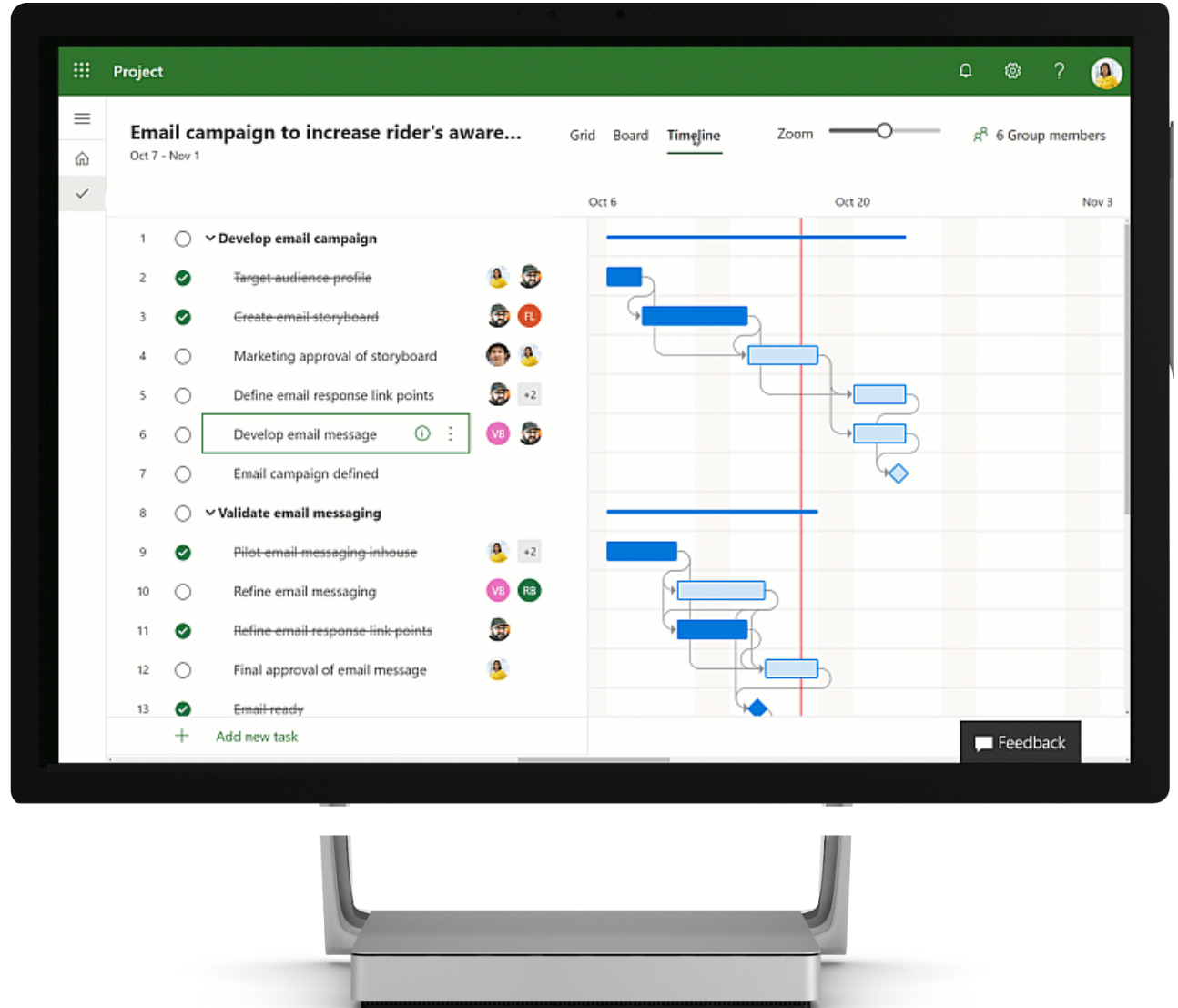


Collaboration made easy

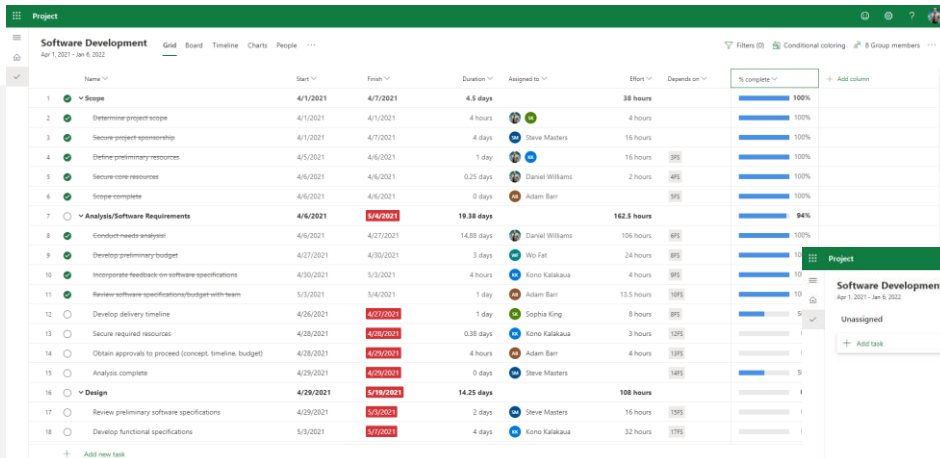
Simple & powerful project
management for everyone



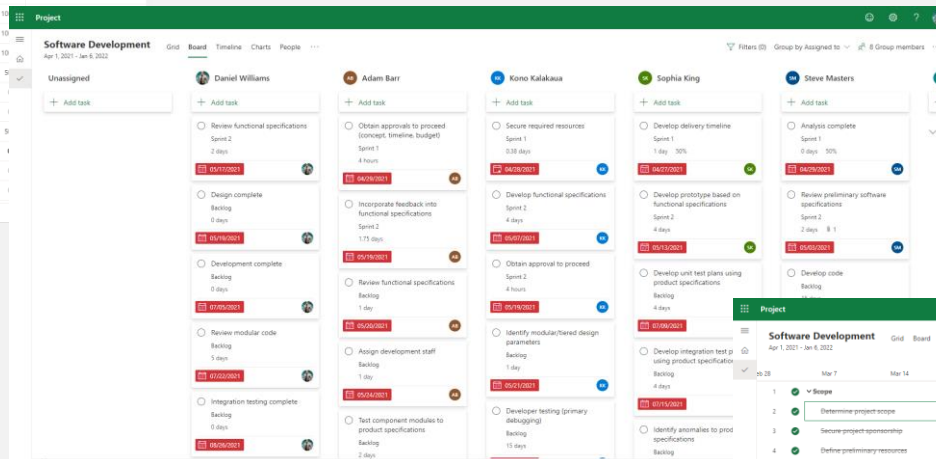
Innovation platform



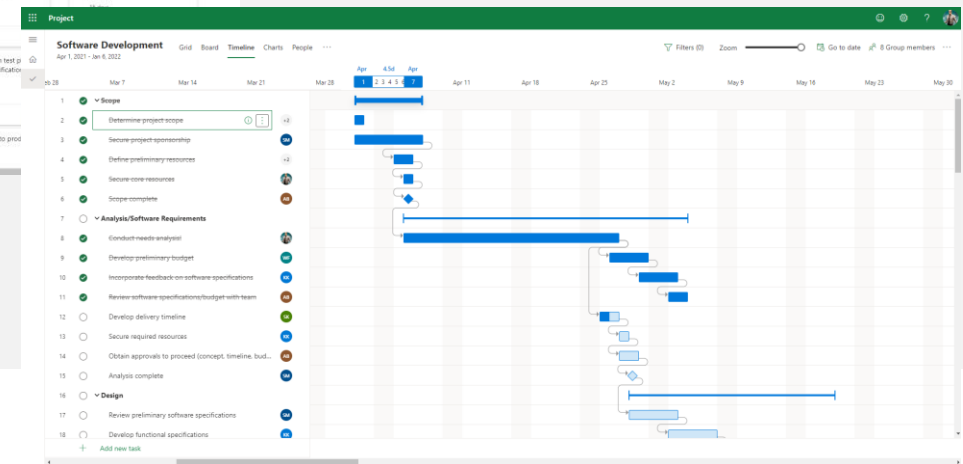
Project Management



Grid



Board



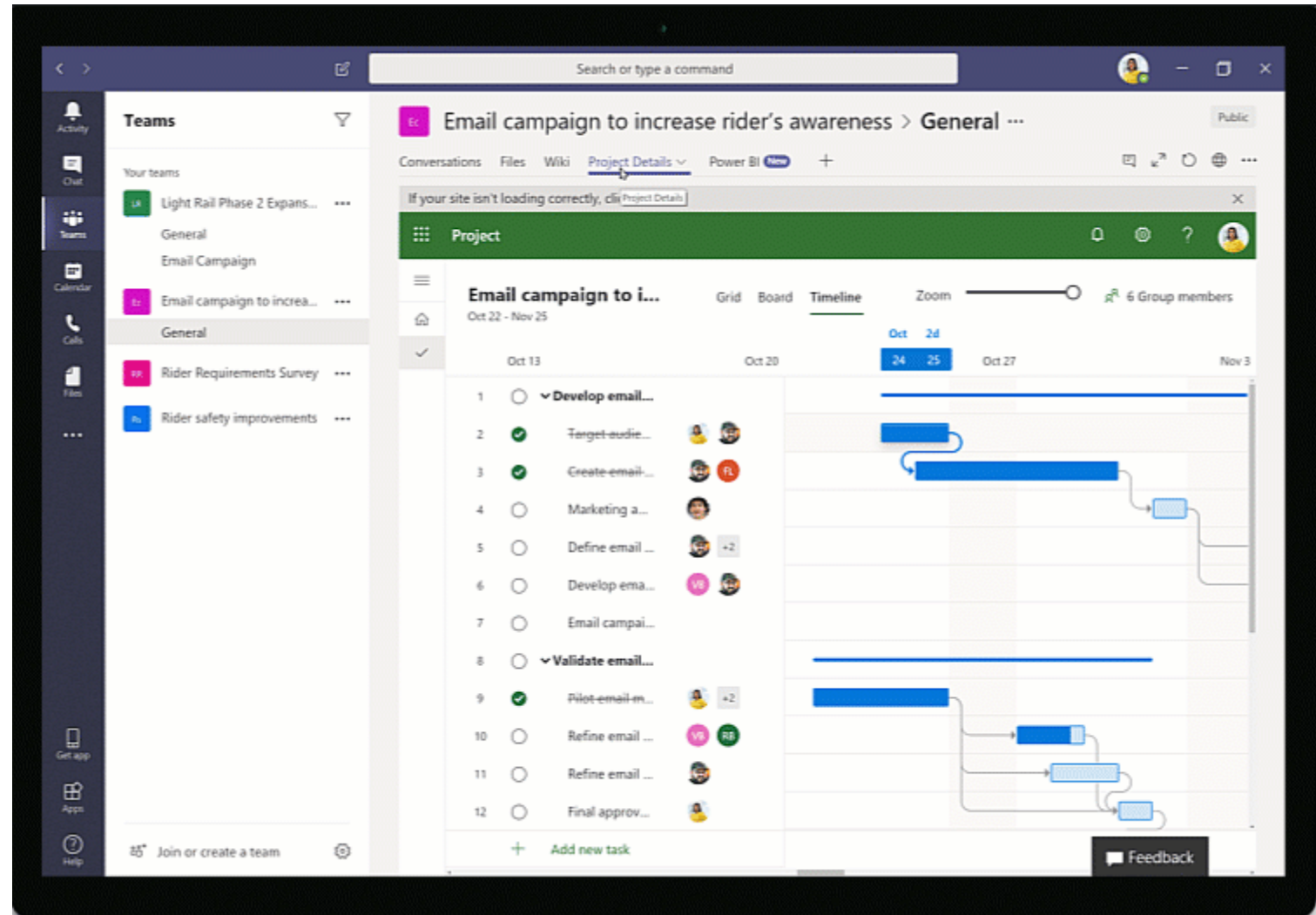
Timeline



Project for the web

Uses Teams for Content and Collaboration

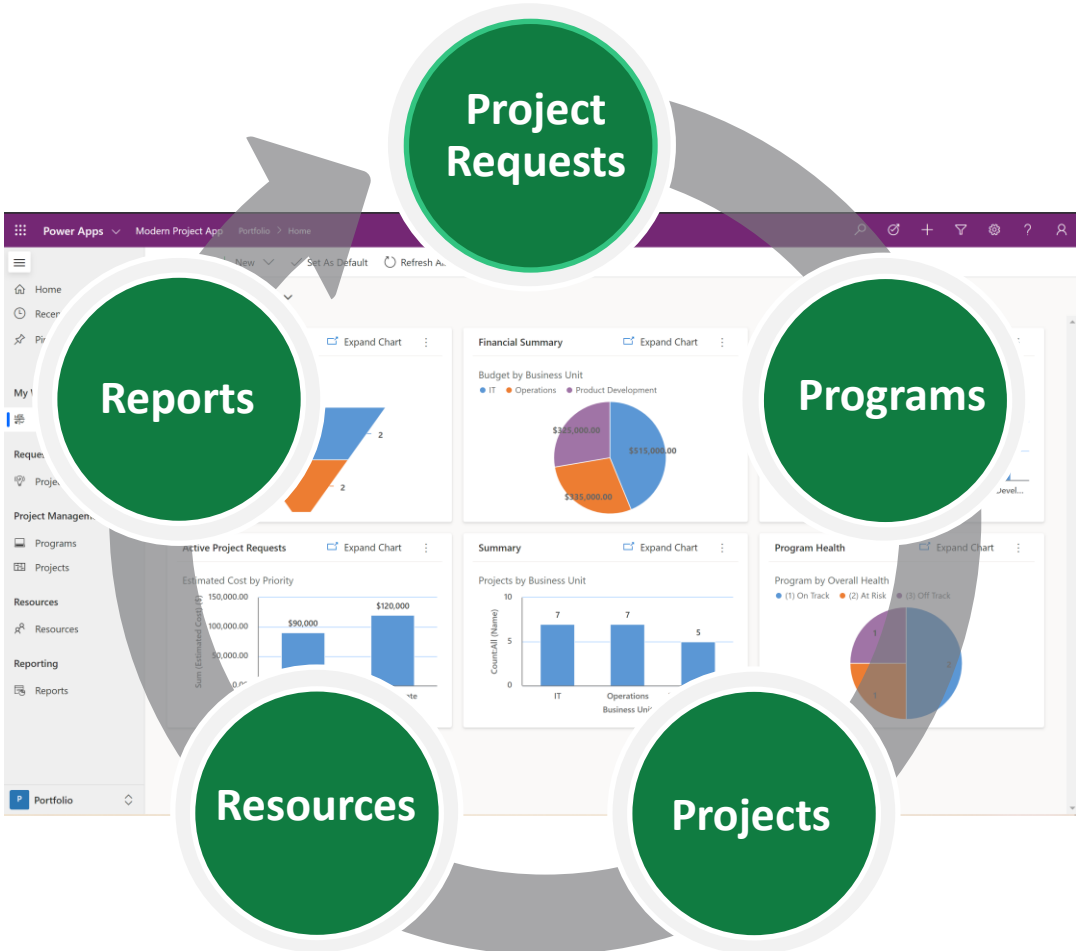
- Add to any team
- Posts
- Files
- Hub for tools/applications



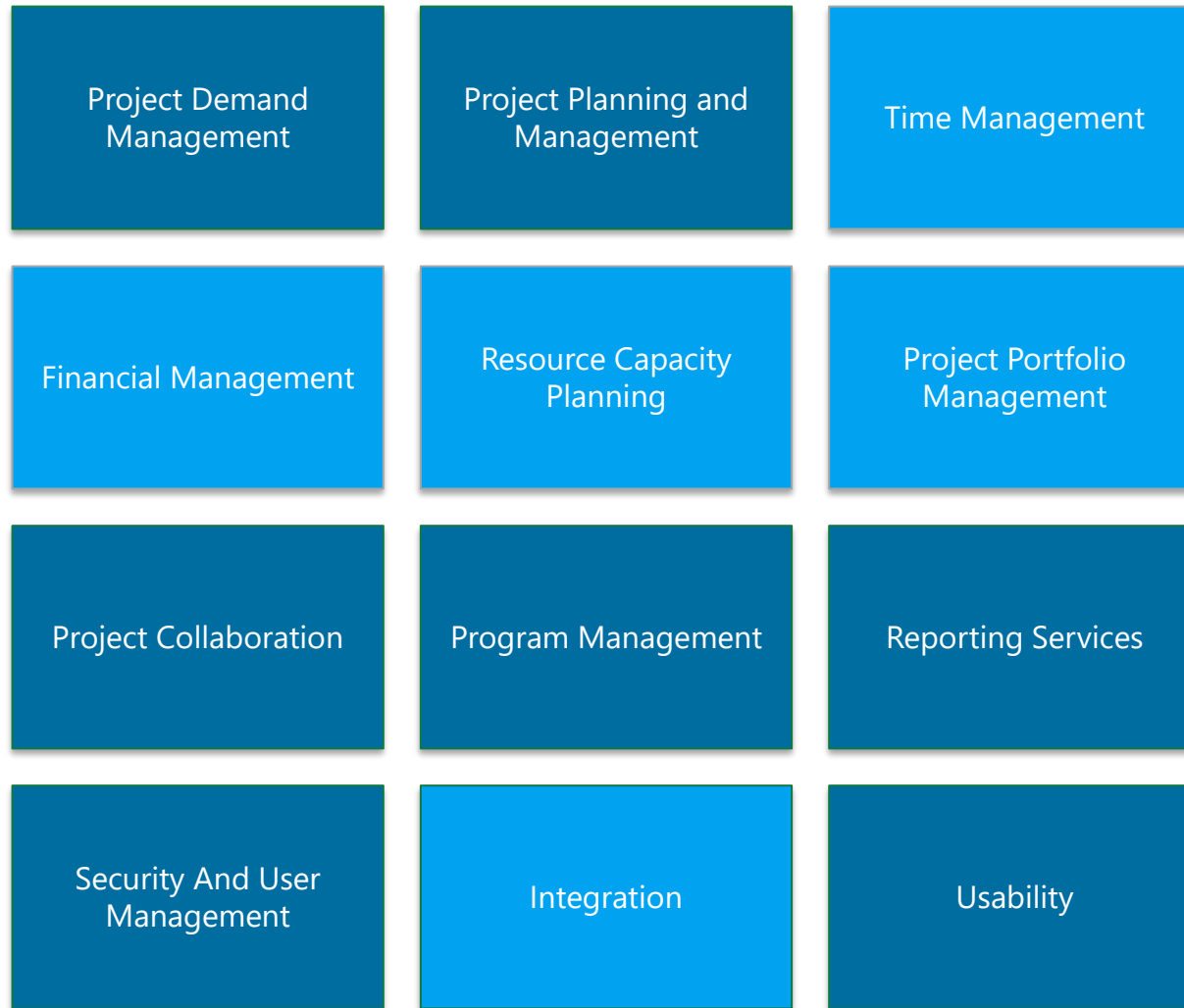
Microsoft Project Management Office Accelerator

Built for Microsoft by OnePlan Solutions
(aka Project Accelerator, PPM Accelerator)

Project for the web with Power Platform for basic Project Portfolio Management Requirements



Critical Capabilities for Project Portfolio Management

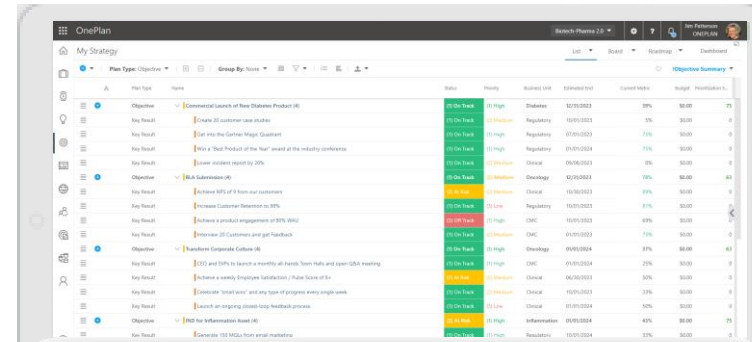


Comprehensive Solution for the Microsoft Cloud

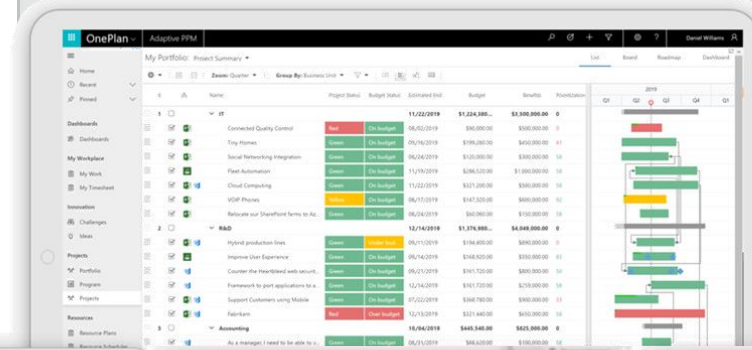
OnePlan

Connecting Strategy to Execution

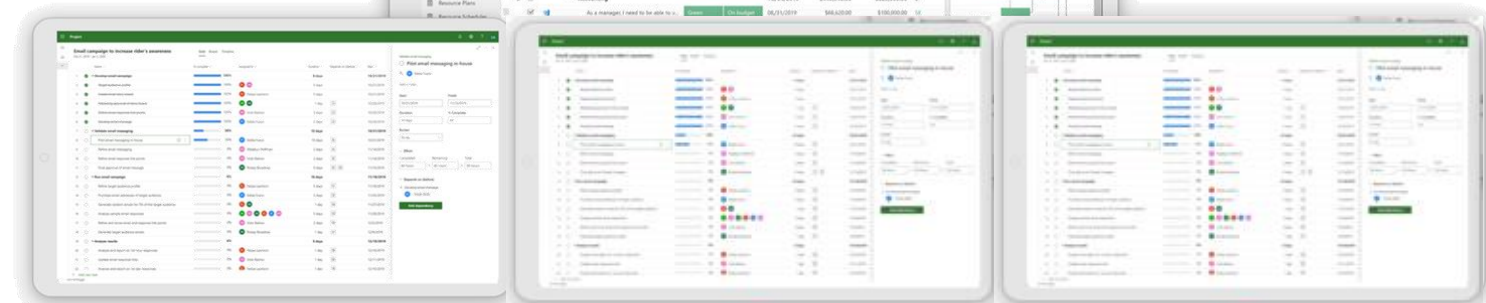
Strategy



Portfolio



Execution



OnePlan - Capabilities, Roles, and Process Flow



Initiation



Planning

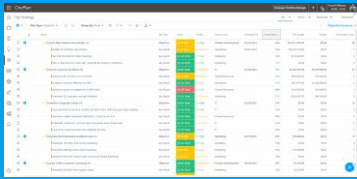


Execution



Delivery/Outcomes

Strategic Planners



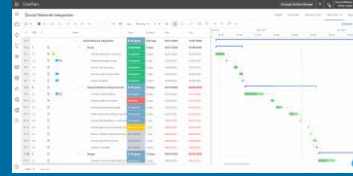
Strategy

Portfolio Managers

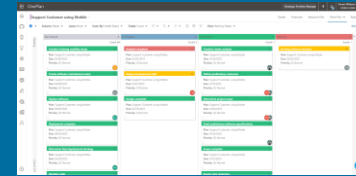


Portfolio Planning

Plan Managers



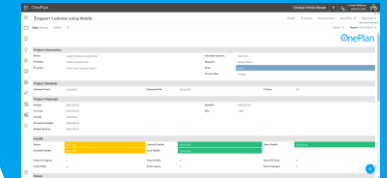
Work Plan



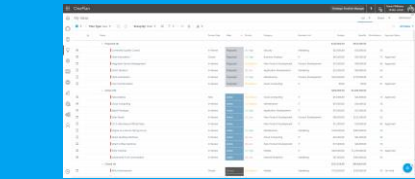
Agile Plan



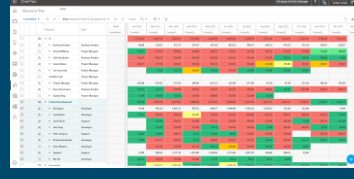
Executives



Status Reports

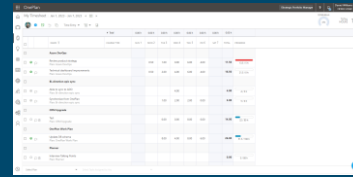


Ideas & Requests

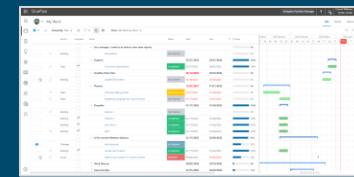


Capacity Planning

Team Members



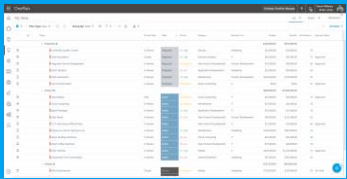
Time Tracking



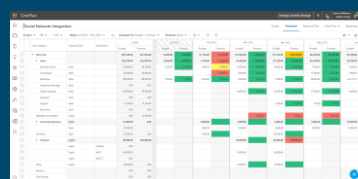
My Work



Dashboards



Enterprise Architecture



Investments



Visualizations

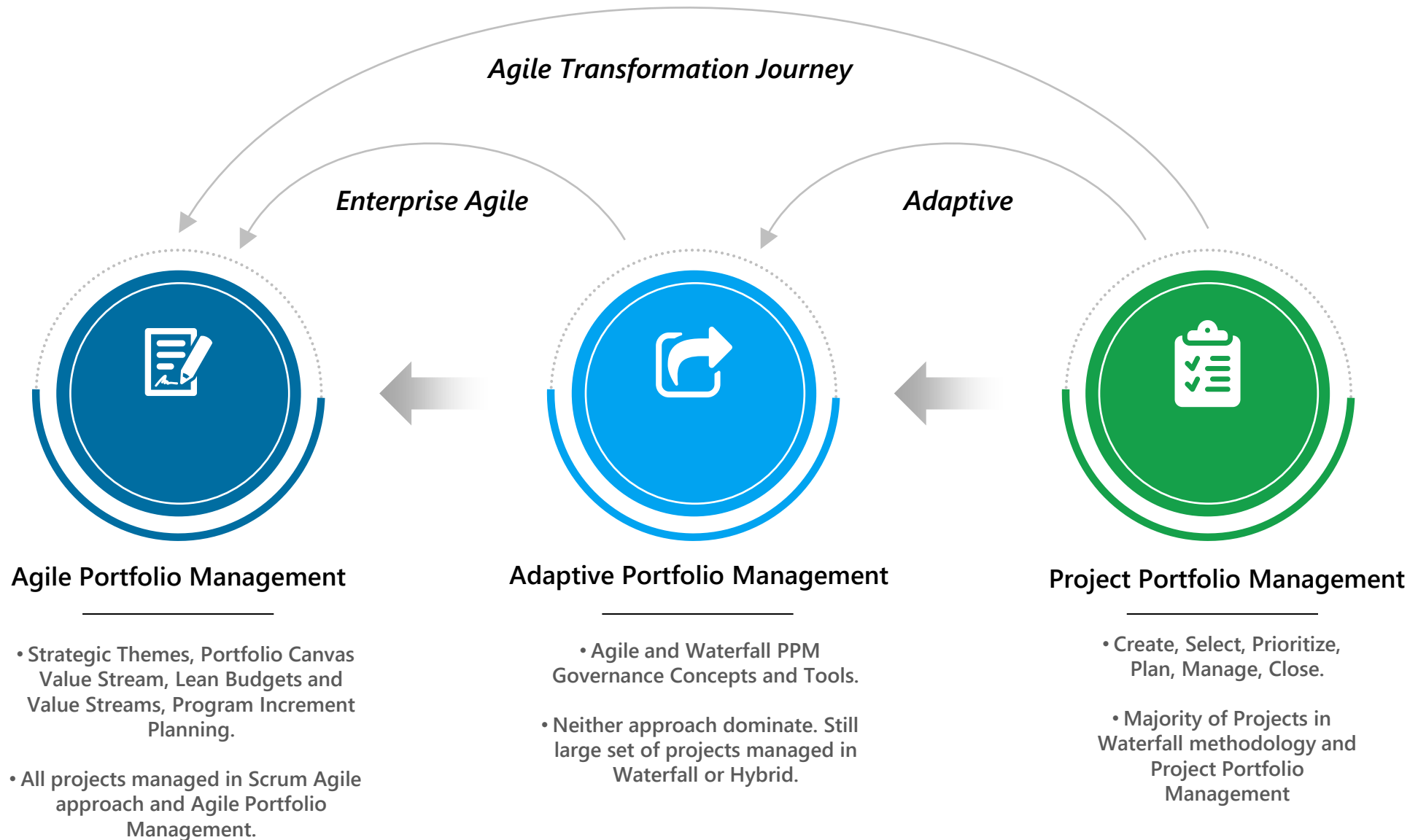
Artificial Intelligence – Sofia GPT

Do the right work



Do the work right

Facilitate the Enterprise Digital Transformation



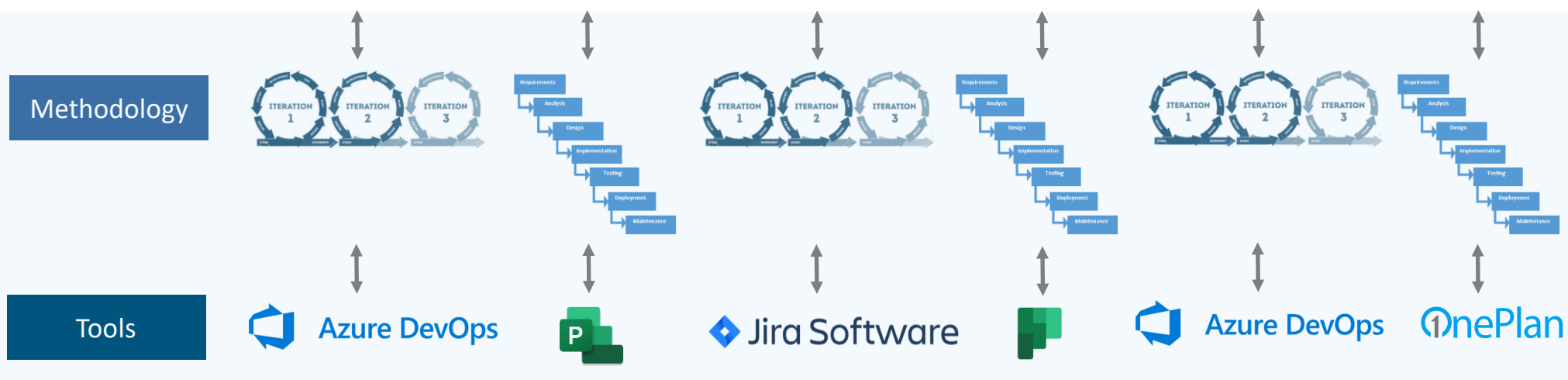
Teams Execute How They Need To

Leadership Gets Visibility It Needs

Leadership



Teams



Consolidating and Translating

All Agile Teams

Leadership

- NPV
- IRR
- ROI
- Earned Value
- Utilization
- Milestones
- CPI
- SPI
- Cost Variance

Strategic Themes

Portfolios

Value Streams

Programs

Initiative

Initiative

Initiative

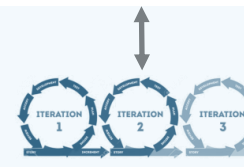
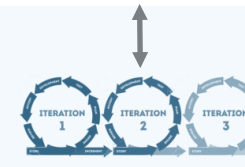
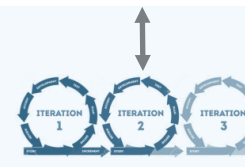
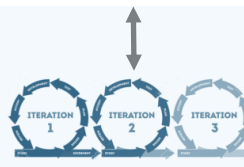
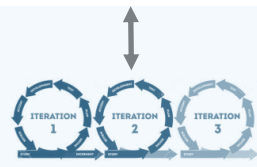
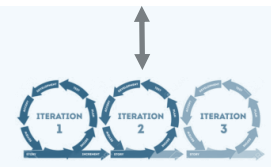
Initiative

Initiative

Initiative

Teams

- Burn Down
- Burn Up
- Velocity
- Cumulative Flow Diagram
- WSJF
- Bug Trends



 Azure DevOps

 Jira Software

 OnePlan

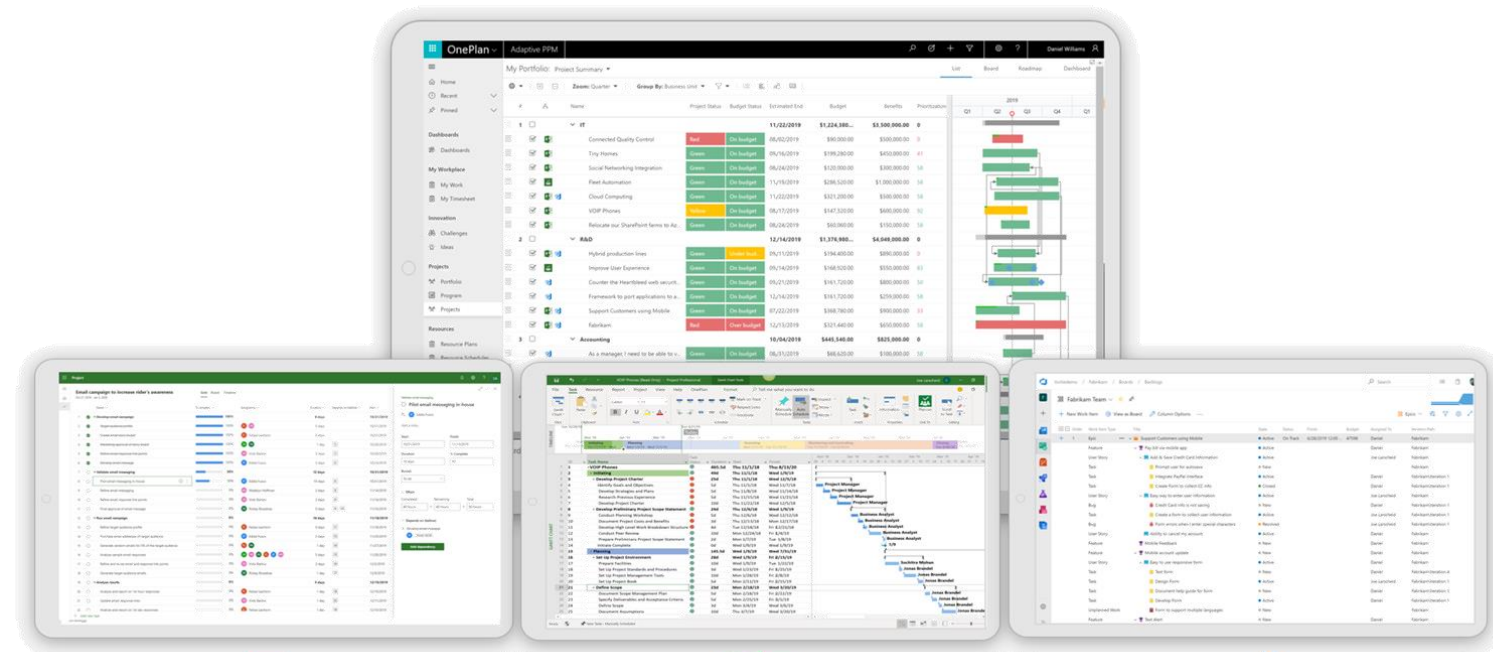
Preconfigured Solutions

ONEPLAN PROVIDES PRECONFIGURED SOLUTIONS IN THE MICROSOFT CLOUD

OnePlan

Connecting Strategy to Execution

OnePlan offers a strategic portfolio, financial and resource management solution that fits the needs of every PMO. Optimize your portfolio, financials and resources enterprise wide. Connect OnePlan with Microsoft Project, Office 365 Planner, Azure DevOps, Jira, and more for a complete view into all work across the enterprise.



Project for the web



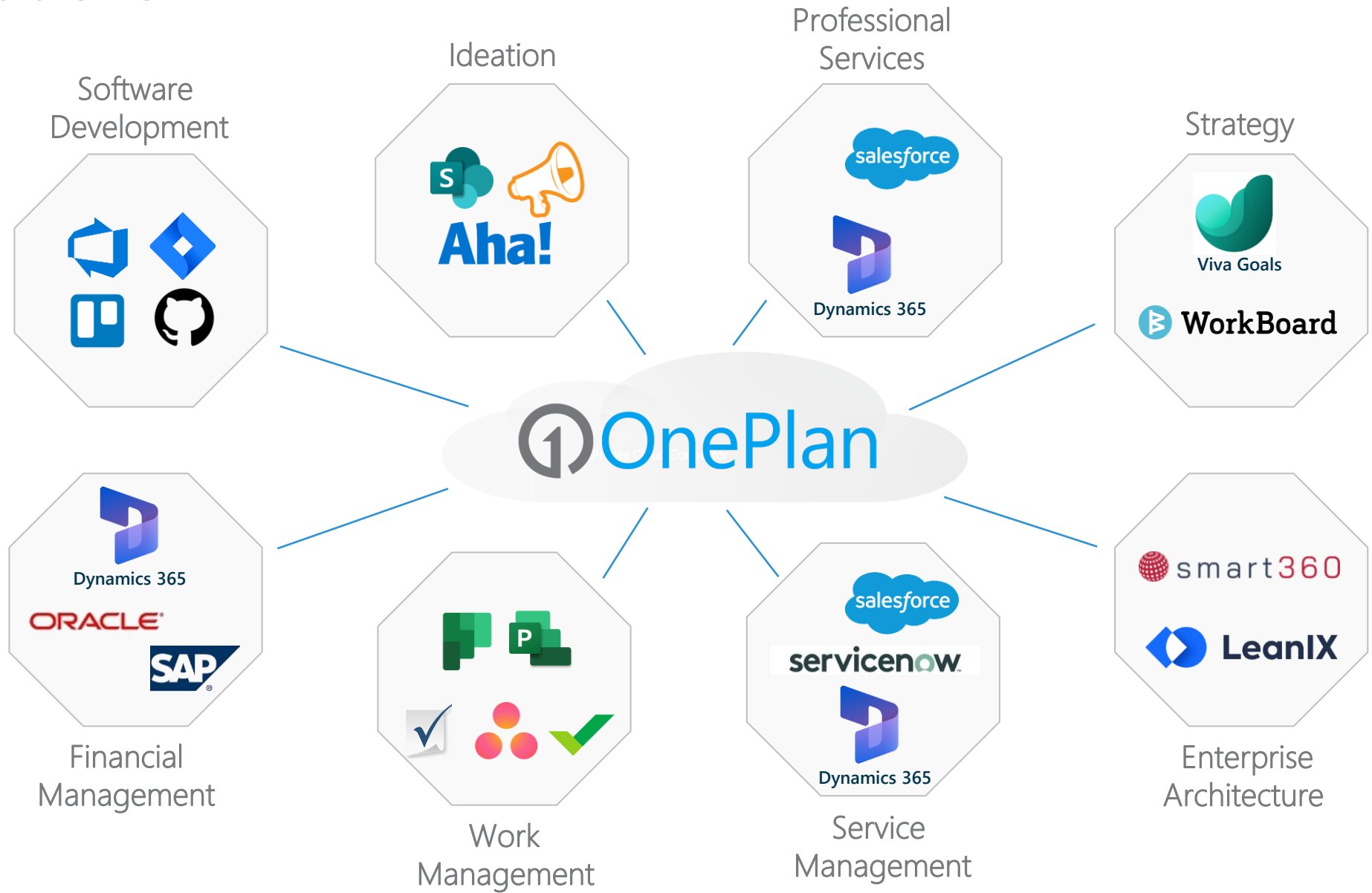
Project Professional



Azure DevOps

OnePlan Integrations

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



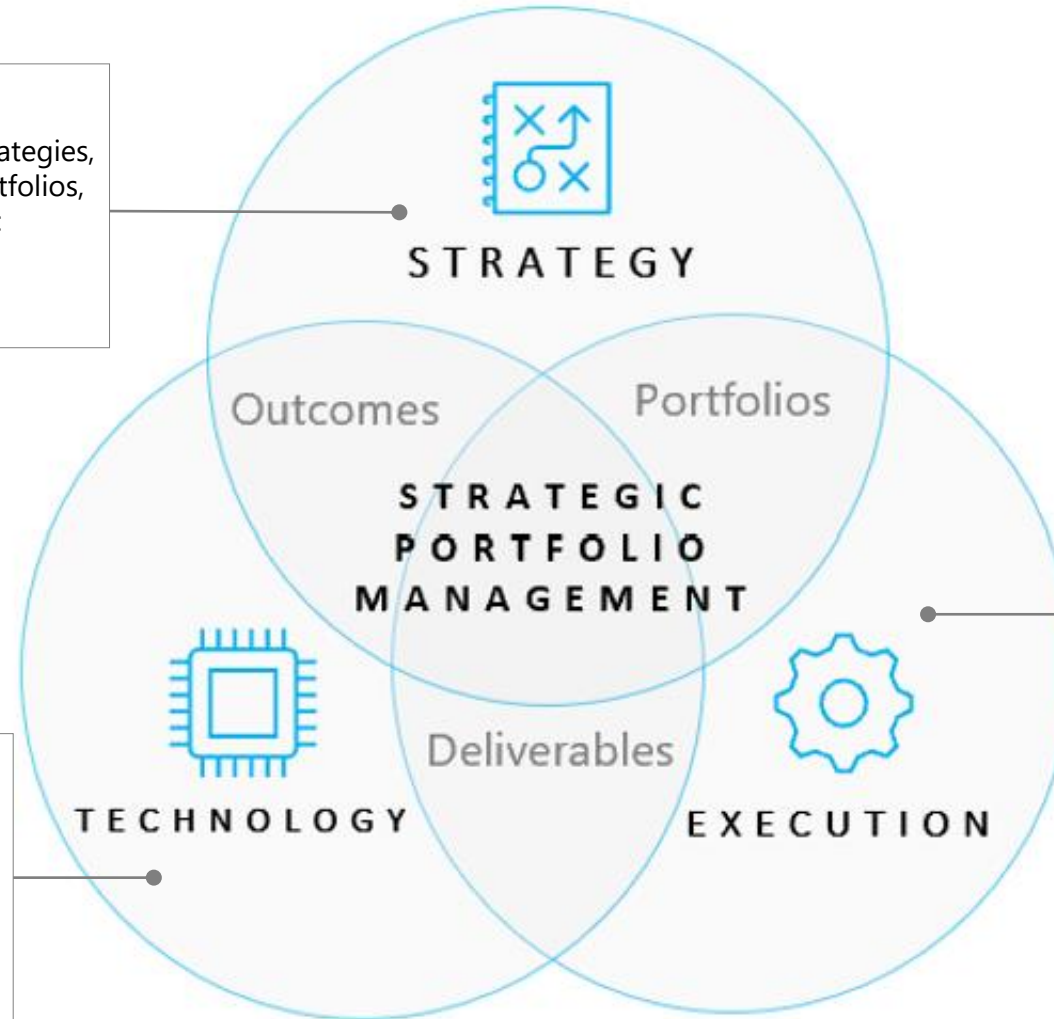
OnePlan Strategic Portfolio Management

A complete solution for the Enterprise

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.

OKRs | VALUE STREAMS



EXECUTION LEADERS

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

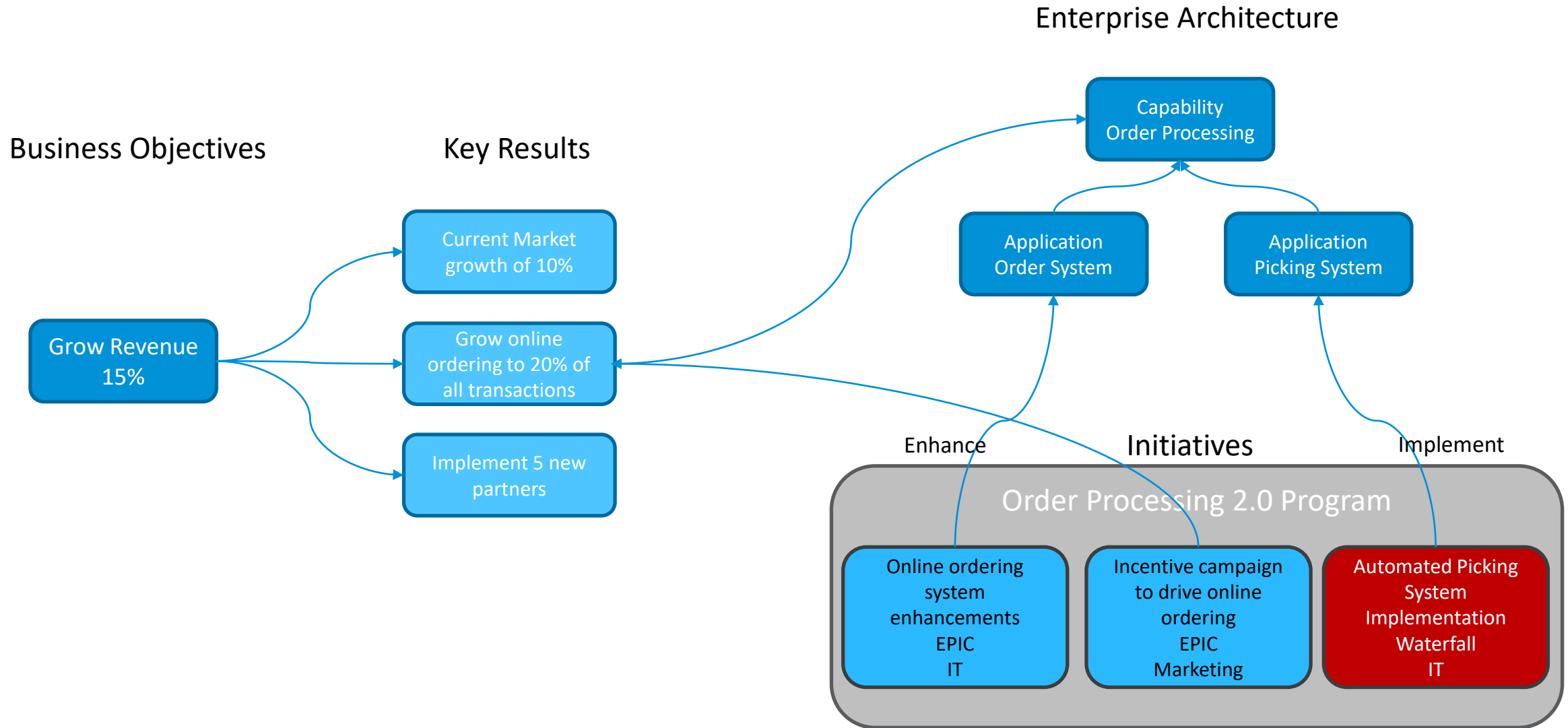
ADAPTIVE | PSA | AGILE | PRODUCT

FUNCTIONAL LEADERS

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

**ENTERPRISE ARCHITECTURE MANAGEMENT
APPLICATION PORTFOLIO MANAGEMENT**

Further Alignment Needed for Strategic Portfolio Management (SPM)



One Comprehensive Solution

My Strategy

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 Tc	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

My Enterprise Architecture

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...	Bu
Products (3)									
Cloud Marketplace	Products	Current Architect	Proposed		Not Rated	Moderate	Low		\$25,000.00
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)									
Monetary tcs 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)									
Value Stream (2)									

Enterprise Architecture

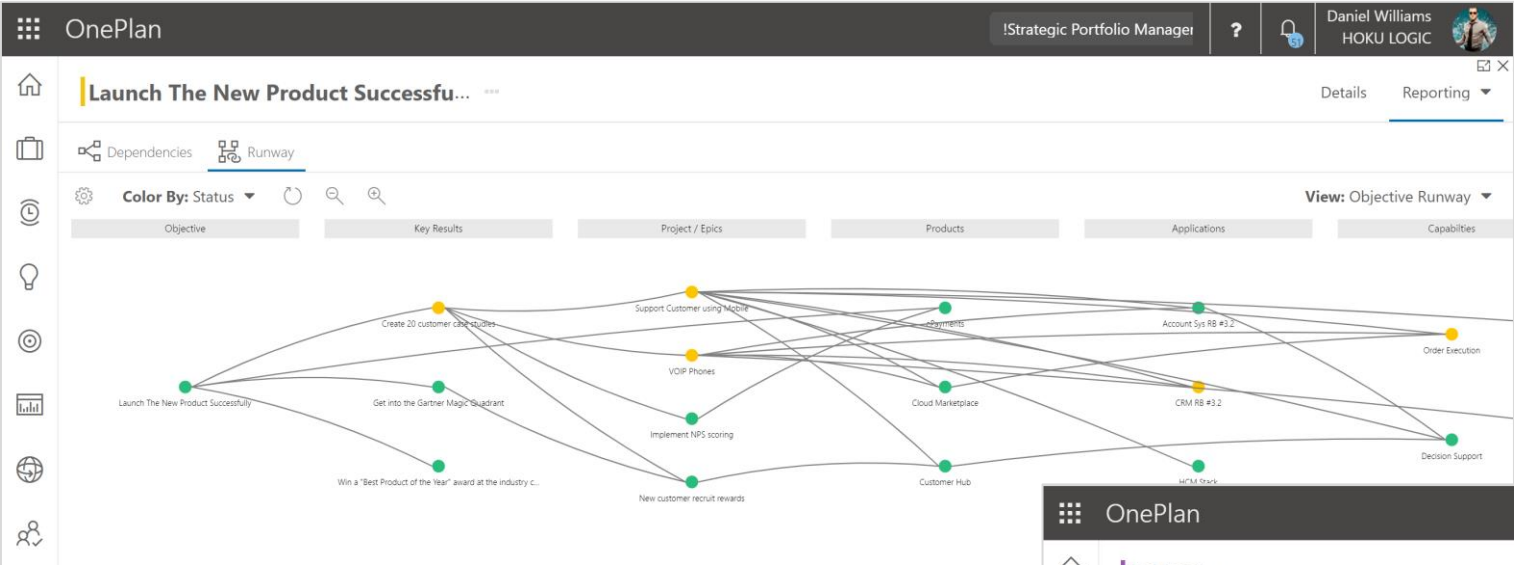
My Portfolio

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

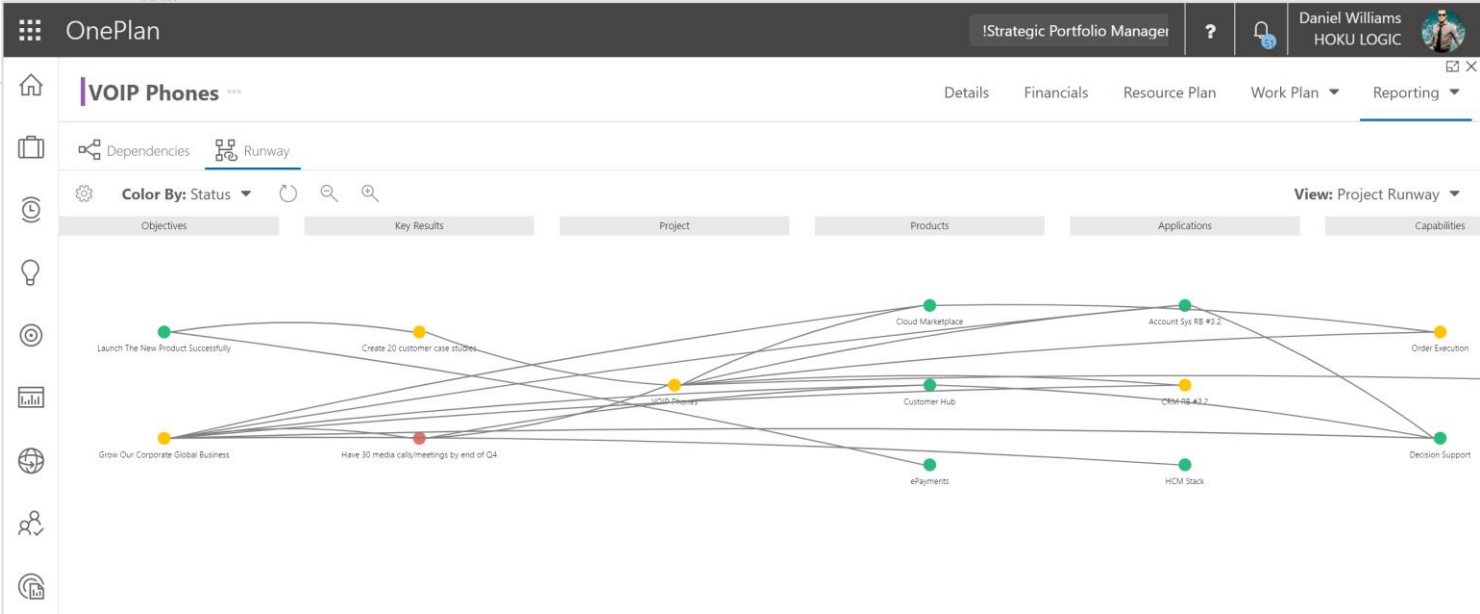
Name	Plan Type	State	Overall Health	Schedule Health	Financial Health	Effort Health	Issue Health	Budget	B
World-Class Customer Support (8)									
Support Customer using Mobile	Project	Active	(1) On Track	(1) On Track	(1) On Track	(1) On Track	(1) On Track	\$717,594.00	\$900.00
Framework to port applications 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)									
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	\$1,128.95
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

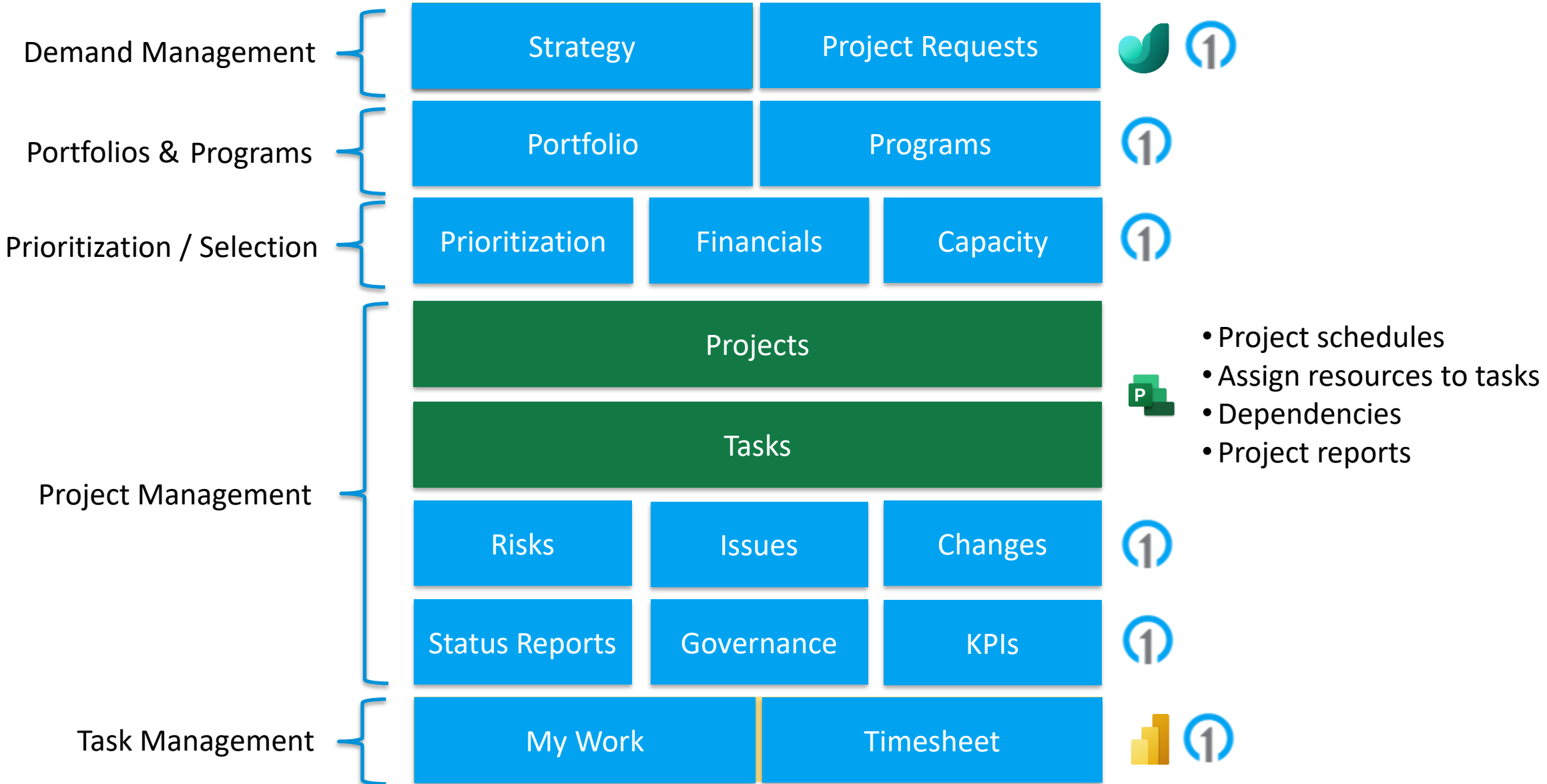


The screenshot displays the OnePlan Modeler interface for 'IT 2022 Planning' with a '\$5M Budget' scenario. It features a table of initiatives with columns for Name, Estimated Start, Estimated End, Benefits, Budget, and Associated Key Results. A summary table at the bottom compares the '\$5M Budget' scenario (16 initiatives, \$5,000,000.00 target budget, \$4,821,202.33 total budget, \$13,000,000.00 target benefits, \$14,466,666.67 total benefits) against a '\$4.5M Budget' scenario (14 initiatives, \$4,500,000.00 target budget, \$4,423,528.33 total budget, \$13,000,000.00 target benefits, \$12,856,666.67 total benefits).

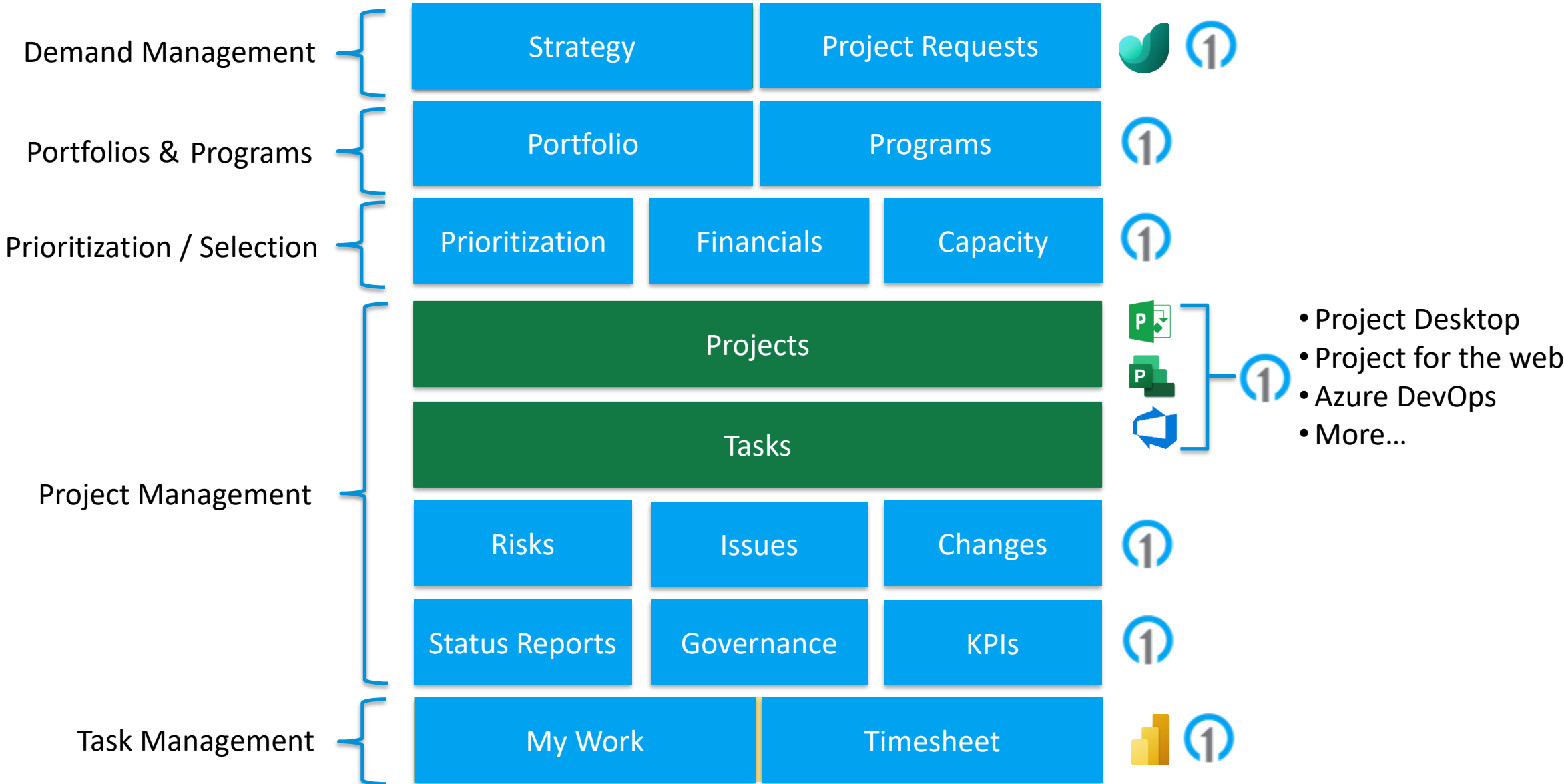
Name	Total In	Target Budget	Total Budget	Target Benefits	Total Benefits
\$5M Budget	16	\$5,000,000.00	\$4,821,202.33	\$13,000,000.00	\$14,466,666.67
\$4.5M Budget	14	\$4,500,000.00	\$4,423,528.33	\$13,000,000.00	\$12,856,666.67

What-if Scenario Modeling

OnePlan Platform Adds Complete Strategic Portfolio Management



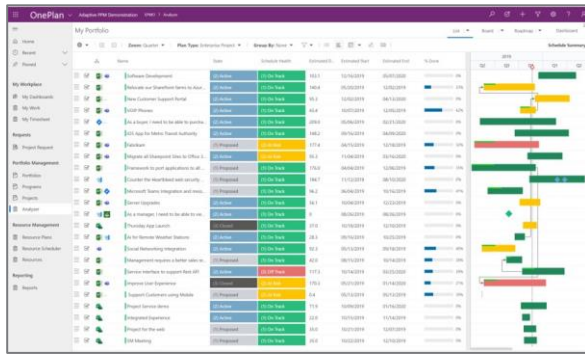
OnePlan Platform Adds Complete Strategic Portfolio Management



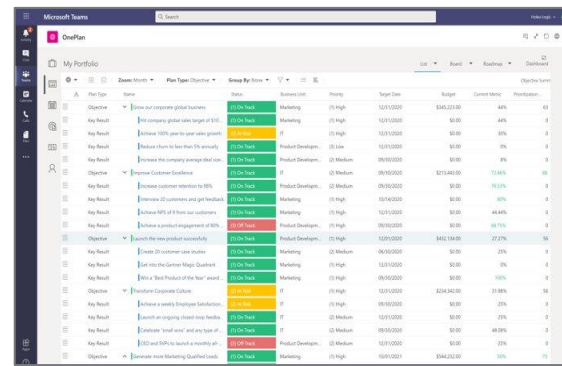
- Project Desktop
- Project for the web
- Azure DevOps
- More...

OnePlan

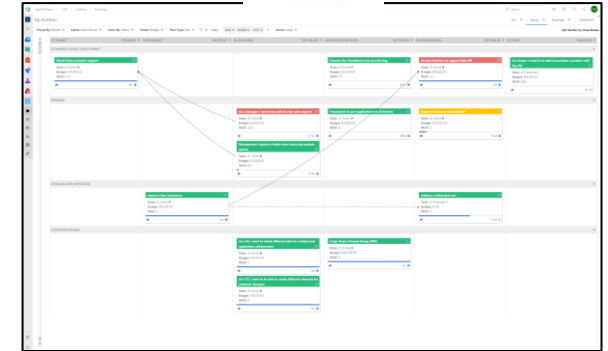
Fused UI - Stay working in the tools that you use in everyday.



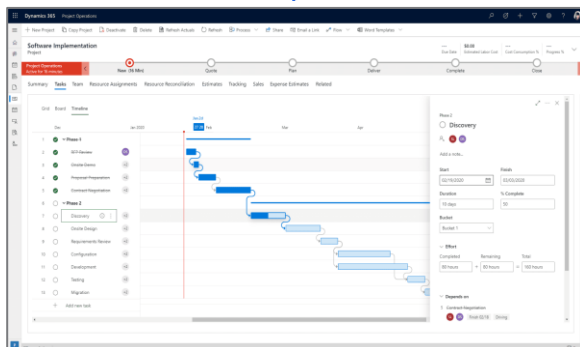
OnePlan in Power Apps



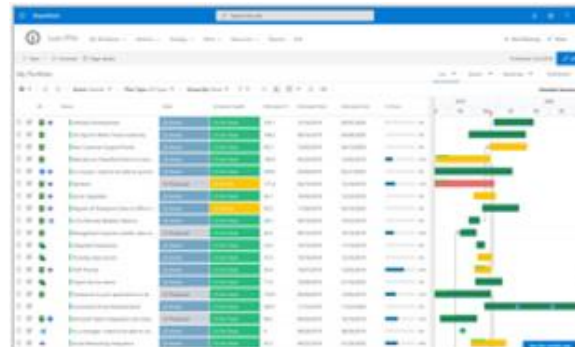
OnePlan in Teams



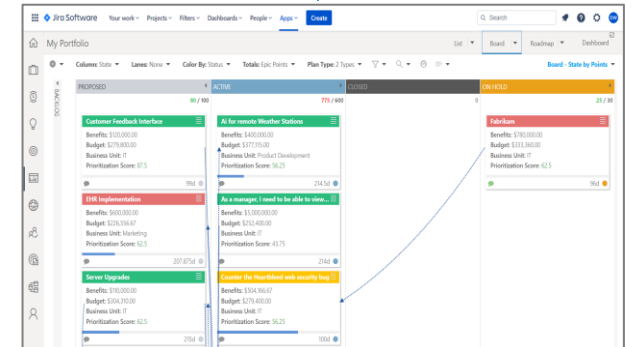
OnePlan in Azure DevOps



OnePlan in Dynamics 365



OnePlan in SharePoint



OnePlan in JIRA

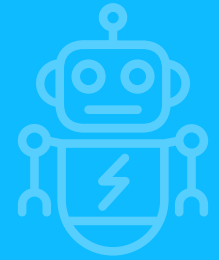


Say Hello to OnePlan's Sofia GPT

“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 Sofia GPT automates several tedious and time-consuming tasks. [Data entry](#), [Information retrieval](#), [Communications](#), [Estimating](#), [Identifying](#), [Finding Data Anomalies](#), and much more.





Demonstration

Sample Use Cases for AI in Strategic Portfolio Management



Strategic Planning

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



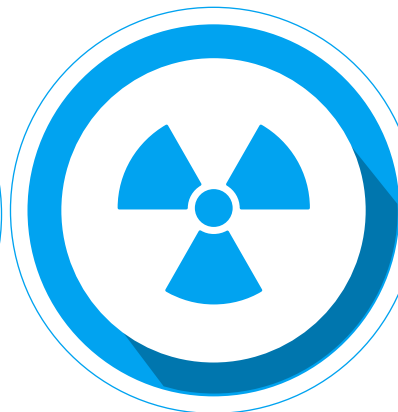
Portfolio Optimization

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



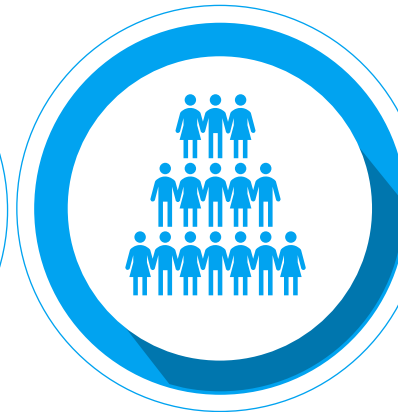
Work Management

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

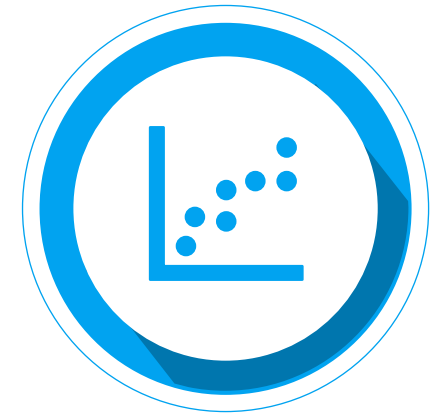
OnePlan's Sofia GPT helps organizations optimize resource allocation across projects and teams.



Investment Forecasting

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

AI-enabled Portfolio Optimization with OnePlan



- **Data analysis:** OnePlan's Sofia GPT can analyze data related to a company's project portfolio, including project goals, resources, timelines, budgets, and risks. This analysis can help identify patterns and trends that can inform decision-making around project selection and prioritization.
- **Prediction and forecasting:** By analyzing OnePlan data, OnePlan's Sofia GPT can make predictions and forecasts about the likely outcomes of different project scenarios. This can help decision-makers anticipate potential problems or opportunities and make more informed decisions about project prioritization.
- **Risk assessment:** OnePlan's Sofia GPT can help assess the risk associated with different projects in a portfolio, including the likelihood of project delays, cost overruns, and other potential issues. This information can help inform project prioritization and resource allocation decisions.
- **Portfolio Optimization:** OnePlan's Sofia GPT can use optimization algorithms to identify the best combination of projects to include in a portfolio based on various criteria, such as business goals, resource availability, and risk tolerance.

Provide a summary of the portfolio data

OnePlan !Strategic Portfolio Manager ? 🔒 Daniel Williams HOKU LOGIC

My Portfolio Industry: IT Business Unit: Product Development, IT List Board Roadmap Dashboard

Plan Type: 2 Types Group By: None Project Summary Data

Plan Type	Name	State	Status	Estimated Start	Estimated End	Budget	Benefits	% Done (Summary)
Project	Support Customer using Mobile	Active	(2) At Risk	01/04/2023	05/24/2023	\$883,000.00	\$450,000.00	8%
Project	Social Network Integration	Active	(2) At Risk	02/27/2023	12/07/2023	\$465,930.00	\$680,000.00	25%
Project	Service interface to support Rest API	Proposed	(1) On Track	01/04/2023	05/18/2023	\$84,600.00	\$100,000.00	12%
Epic	Fabrikam	Proposed	(3) Off Track	03/20/2023	02/26/2024	\$252,500.00	\$780,000.00	0%
Project	VOIP Phones	Active	(2) At Risk	12/12/2022	04/24/2023	\$141,250.00	\$1,200,000.00	96%
Project	Microsoft Teams Integration and messaging	Active	(1) On Track	04/04/2023	01/29/2024	\$289,195.00	\$25,250.00	35%
Project	Server Upgrades	Proposed	(1) On Track	01/23/2023	06/05/2023	\$112,800.00	\$110,000.00	0%
Project	iOS Apps for Metro Transit Authority	On Hold	(1) On Track	03/13/2023	01/29/2024	\$414,990.00	\$560,000.00	0%
Epic	Delivering Agile Solutions	Proposed	(2) At Risk	01/23/2023	03/24/2023	\$56,933.33	\$870,000.00	0%
Epic	New Customer Support Portal	Active	(3) Off Track	03/06/2023	07/26/2023	\$208,200.00	\$110,000.00	32%
Epic	As a manager, I need to be able to view sales	Proposed	(1) On Track	02/28/2023	12/20/2023	\$273,700.00	\$500,000.00	0%
Project	Framework to port applications to all devices	Proposed	(1) On Track	02/07/2023	01/10/2024	\$275,560.00	\$0.00	0%
Project	Team Collaboration	Active	(3) Off Track	03/06/2023	10/03/2023	\$223,440.00	\$350,000.00	31%
Project	Support	Active	(1) On Track	03/07/2023	01/25/2024	\$575,540.00	\$500,000.00	22%
Project	Planner	Active	(1) On Track	01/02/2023	10/23/2023	\$251,440.00	\$520,000.00	15%
Project	Marketing Event	Active	(2) At Risk	02/14/2023	04/11/2023	\$36,450.00	\$150,000.00	0%
Project	CRM Upgrade	Proposed	(1) On Track	05/17/2023	08/15/2023	\$94,100.00	\$246,000.00	0%

AI-enabled Work Management with OnePlan

- **Work plan creation:** OnePlan's Sofia GPT can help create and manage work templates for common types of work, such as project planning, marketing campaigns, or software development. These templates can be customized based on the specific needs of a project, and they can be used to standardize workflows, reduce errors, and improve efficiency.
- **Schedule risk assessment:** OnePlan's Sofia GPT can help teams assess the risk associated with individual tasks and projects by analyzing data related to past performance, resource availability, and other factors that can impact project success. By identifying and mitigating risks early on, teams can improve the likelihood of project success and avoid potential delays or failures.
- **Schedule optimization:** OnePlan's Sofia GPT can help teams optimize project schedules by analyzing data related to resource availability, task dependencies, and project goals. By identifying the most efficient and effective schedule, teams can reduce delays and improve overall project outcomes.



Build a Project Schedule for a Smart Home Automation System

The screenshot displays the OnePlan dashboard interface. At the top, the user is identified as Daniel Williams (HOKU LOGIC) on Sunday, April 30, 2023. The dashboard is divided into several sections:

- Insights:** A list of five items with icons and 'View Details' links:
 - You have some plans that have not been updated in 30 days
 - You have 6 overdue tasks
 - You have some plans that have less than 75% Compliance
 - Some of your plans have status reports that are due
 - You have some plans that have tasks to approve
- Plans:** A table with columns for Name, Compliance, Plan Type, and Last Accessed. It includes a search bar and filter tabs (Recent, Favorite, Plans I Own, Plans Shared With Me, All Plans).

Name	Compliance	Plan Type	Last Accessed
Grow Future Home Automation	100%	Objective	04/30/2023
Increase Customer Retention to 98%	50%	Key Result	04/30/2023
Support Customer using Mobile App	100%	Project	04/30/2023
- Recent Conversations:** Two chat messages with 'Plan' titles:
 - Plan: Server Upgrades**: "Have all the servers been upgraded successfully?"
 - Plan: Support Customer using Mobile App**: "Where can I find the latest specification document for the new customer support app?"
- Due Soon:** A section with tabs for Overdue, This Week, and This Month. It shows one item: "Review and Approve Project..." due on 05/03/2023.

AI-enabled Risk Identification & Mitigation with OnePlan

- **Identifying and categorizing risks:** Sofia GPT can analyze large volumes of data and identify potential risks that may affect an organization. It can also categorize the risks based on severity, likelihood of occurrence, and potential impact on the organization.
- **Predicting future risks:** Sofia GPT can analyze historical data and use machine learning algorithms to predict future risks that may arise. This can help organizations take preventive measures and prepare for potential risks.
- **Recommending mitigation strategies:** Based on the identified risks, Sofia GPT can recommend mitigation strategies that can help organizations reduce the likelihood or impact of the risks. These strategies can be customized based on the specific needs and characteristics of the organization.



Identify potential risks and how to mitigate them

OnePlan Strategic Portfolio Manager Daniel Williams HOKU LOGIC

Smart Home Automation System

Details Financials Resource Plan Work Plan Reporting

View: Planning Schedule

#	WBS	Name	Status	Duration	Start	Due	Effort	Assigned Resources	% Done
1		Smart Home Automation System		21 days	05/10/2023	06/07/2023	0 hours		
2	1	Research and Planning	Not Started	7 days	05/10/2023	05/18/2023	0 hours	PM	
3	1.1	Identify Requirements	Not Started	3 days	05/10/2023	05/12/2023		PM	
4	1.2	Research Smart Home Technologie	Not Started	7 days	05/10/2023	05/18/2023		BA	
5	1.3	Create Project Plan	Not Started	3 days	05/10/2023	05/12/2023		PM	
6	2	Design and Development	Not Started	21 days	05/10/2023	06/07/2023	0 hours	CE	
7	2.1	Design Smart Home System	Not Started	7 days	05/10/2023	05/18/2023			
8	2.2	Develop Smart Home System	Not Started	21 days	05/10/2023	06/07/2023		CE	
9	3	Testing and Deployment	Not Started	7 days	05/10/2023	05/18/2023	0 hours	CS	
10	3.1	Test Smart Home System	Not Started	7 days	05/10/2023	05/18/2023		CS	
11	3.2	Deploy Smart Home System	Not Started	7 days	05/10/2023	05/18/2023		SM	

Tasks New Item

AI-enabled Resource Capacity Planning with OnePlan

- **Resource Allocation:** Sofia GPT can help organizations optimize resource allocation by analyzing the current resource usage patterns and predicting future demand. This can help organizations to allocate resources more efficiently and avoid over/underutilization of resources.
- **Capacity Planning:** Sofia GPT can help organizations to plan for future capacity requirements by analyzing historical usage data and predicting future demand. This can help organizations to make informed decisions about when to add or remove resources to meet changing business needs.
- **Resource Optimization:** Sofia GPT can be used to optimize resource utilization by identifying opportunities to reduce waste, improve efficiency, and increase productivity. This can help organizations to reduce costs and improve their overall performance.
- **Predictive Talent Acquisition:** Sofia GPT can analyze OnePlan data to predict future hiring needs based on trends and patterns. This can help businesses plan their talent acquisition strategy and identify the right candidates for their organization



Provide a sample Resource Plan by hours and month for this plan

OnePlan !Agile Portfolio Management ? Daniel Williams HOKU LOGIC

Shipping & Delivery Details Financials **Resource Plan** Work Plan Reporting

Committed | View: Hours

Resource		Totals	Jan 2023	Feb 2023	Mar 2023	Apr 2023	May 2023	Jun 2023	Jul 2023	Aug 2023	Sep 2023	Oct
		Committed	Committ...	Committ...	Committ...	Committ...	Committ...	Committ...	Committ...	Committ...	Committ...	Comn
<input type="checkbox"/>	Plan Total	0.00										

Find Resource Find Resources Replace Resource

Name	Availability ↓	Jan 2023	Feb 2023	Mar 2023	Apr 2023	May 2023	Jun 2023	Jul 2023	Aug 2023	Sep 2023	Oct
<input type="checkbox"/> ▶ Developer	100%										
<input type="checkbox"/> ▶ Project Manager	100%										
<input type="checkbox"/> ▶ Support	100%										

AI-powered Investment Forecasting and Predictive Analytics

- **Predicting and forecasting costs:** Sofia GPT can analyze OnePlan financial data, identify patterns, and predict future costs. This can help businesses plan their budgets more accurately and avoid unexpected expenses.
- **Optimizing spending:** Sofia GPT can analyze spending patterns and identify areas where costs can be reduced or optimized. This can help businesses make more informed decisions about where to allocate their resources.
- **Providing real-time insights:** Sofia GPT can provide real-time insights into financial data, allowing businesses to make more informed decisions quickly. This can help businesses respond to changes in the market or in their own financial situation more effectively.



What are the key insights and trends that can be inferred from the financial data?

OnePlan | DEMO Strategic Portfolio M | Daniel Williams HOKU LOGIC

Support Customer using Mobile App ***

Budget | Dates: Aug 2023 - Mar 2024 | Compare To: Budget < Forecast | Variance: None

Cost Category	Expense Type	Totals		Aug 2023		Sep 2023		Oct 2023		Nov 2023	
		Budget	Forecast	Budget	Forecast	Budget	Forecast	Budget	Forecast	Budget	Forecast
Plan Total		1,032,331.00	645,160.00	8,600.00	11,600.00	23,200.00	18,200.00	28,280.00	110,280.00	28,400.00	35,400.00
Labor		987,331.00	640,160.00	8,600.00	11,600.00	23,200.00	18,200.00	28,280.00	105,280.00	28,400.00	35,400.00
Business Analyst	OpEx	681,345.00	100,000.00	3,000.00	6,000.00	5,000.00	6,000.00	8,000.00	8,000.00		7,000.00
Developer	OpEx	160,650.00	313,650.00	3,600.00	3,600.00	7,200.00	7,200.00	14,400.00	14,400.00	14,400.00	14,400.00
Project Manager	OpEx	128,416.00	193,750.00	2,000.00	2,000.00	11,000.00	5,000.00	3,000.00	80,000.00	14,000.00	14,000.00
Support	OpEx	16,920.00	32,760.00					2,880.00	2,880.00		
Materials and Supplies	CapEx	0.00	0.00								
Travel and Expenses	OpEx	0.00	0.00								
Contracts	OpEx	0.00	0.00								
Software	CapEx	45,000.00	5,000.00						5,000.00		
Other	CapEx	0.00	0.00								
Revenue		0.00	0.00								
Cost Savings		0.00	0.00								
Budget		0.00	0.00								



Summary & Next Steps

Summary

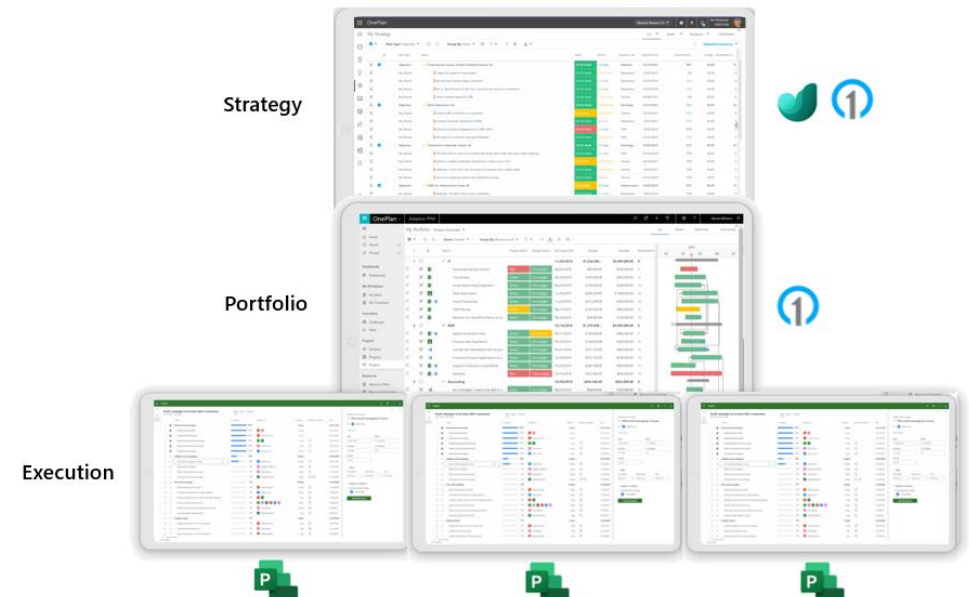
- Microsoft is in the process of reimagining Project and Project Online
- Project for the web provides new, modern, project execution and scheduling
- Project for the web does not have full feature parity with Project Online
- OnePlan provides a platform that extends Project for the web, and goes beyond the capabilities of Project Online
- OnePlan also adds Strategic Portfolio Management capabilities
- OnePlan integrates with other solutions/tools as needed, including Microsoft Project Professional
- Sofia GPT provides AI-enabled capabilities in OnePlan to make users more efficient and effective

OnePlan



Project for the web

A Modern Solution That
Extends Beyond Project Online



Our Next Webinar

<https://oneplan.ai/webinars/>

LIVE

August 17, 2023 |
10:00am PT &
1:00pm ET

Strategic Portfolio Management

Navigating the Strategic Portfolio Management Hype Cycle

In this webinar, we'll explore Gartner's Strategic Portfolio Management Hype Cycle and its alignment to OnePlan capabilities and features. This session will be your roadmap to effectively leverage OnePlan's capabilities when applying the practices and technologies suggested by Gartner in their SPM Hype Cycle. With the use of OnePlan and the Gartner SPM Hype Cycle, [...]

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Assistance available from OnePlan

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

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Adaptive Project Portfolio Management

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

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[Get Started](#)



Agile Portfolio Management

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

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[Coming Soon](#)



Professional Service Automation

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

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

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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. At the top, the title bar reads "OnePlan" and includes a "My Portfolio" section with a "List" view selected. Below the title bar, there are filters for "Zoom: Month", "Plan Type: Objective", and "Group By: None". The main content area is a table with the following columns: Plan Type, Name, Status, Business Unit, Lead, Priority, and Estimated End. The table lists several objectives and their corresponding key results, with status indicators (e.g., "At Risk", "On Track", "Off Track") and color-coded cells (yellow, green, red).

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

Next Steps

OnePlan



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



For more information:
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Thank You!!

The Power of One

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