

OnePlan

Revolutionizing Adaptive Project Portfolio Management
with ChatGPT and AI

MPUG

In partnership with



What Is Generative AI?

ChatGPT

An OpenAI service that incorporates a conversational chatbot with an LLM to create content. It was trained on a foundational model of billions of words from multiple sources and was then fine-tuned by reinforcement learning from human feedback.

Large Language Models (LLM)

AI that is trained on vast amounts of text allowing it to interpret and generate humanlike textual output.

Foundation Models

Large machine learning models. They are trained on a broad set of unlabeled data, fine-tuned and adapted to a wide range of applications.

Generative AI (GenAI)

AI techniques that learn from a representation of artifacts in a model & generate new artifacts with similar characteristics.

Source: Gartner

What Are ChatGPT and GPT?

ChatGPT is a chat application that uses a specially trained version of GPT (GPT-3.5).

- ChatGPT is designed to interact with users conversationally and to use GPT-3.5's specially trained large training set.

GPT (Generative Pre-trained Transformer) is a type of foundation model.

- Foundation models (also known as large language models [LLMs]) are a type of machine learning that uses very large pretraining sets.
- There are many uses and types of foundation models.

OpenAI (founded in 2015) develops leading generative artificial intelligence (AI) technology.

- OpenAI developed ChatGPT.

Microsoft invested \$1 billion in 2019 and \$10 billion in 2023. It has exclusive rights until it has recouped its investment.

Two Versions of ChatGPT in the Market

There are two versions of ChatGPT in the market:

- Version 1: OpenAI ChatGPT.
- Version 2: Azure OpenAI Service's ChatGPT available from Microsoft.

Microsoft's Azure OpenAI Service to offer enterprise levels of security, compliance and confidentiality:

- OpenAI LLC's version gives no privacy or confidentiality assurances.

Both ChatGPT services operate on closed, specially trained versions of GPT-3.5:

- Many projects will not use ChatGPT, but instead use their own variations of transformer models.
- APIs are available for GPT models

Longer-term Microsoft strategy:

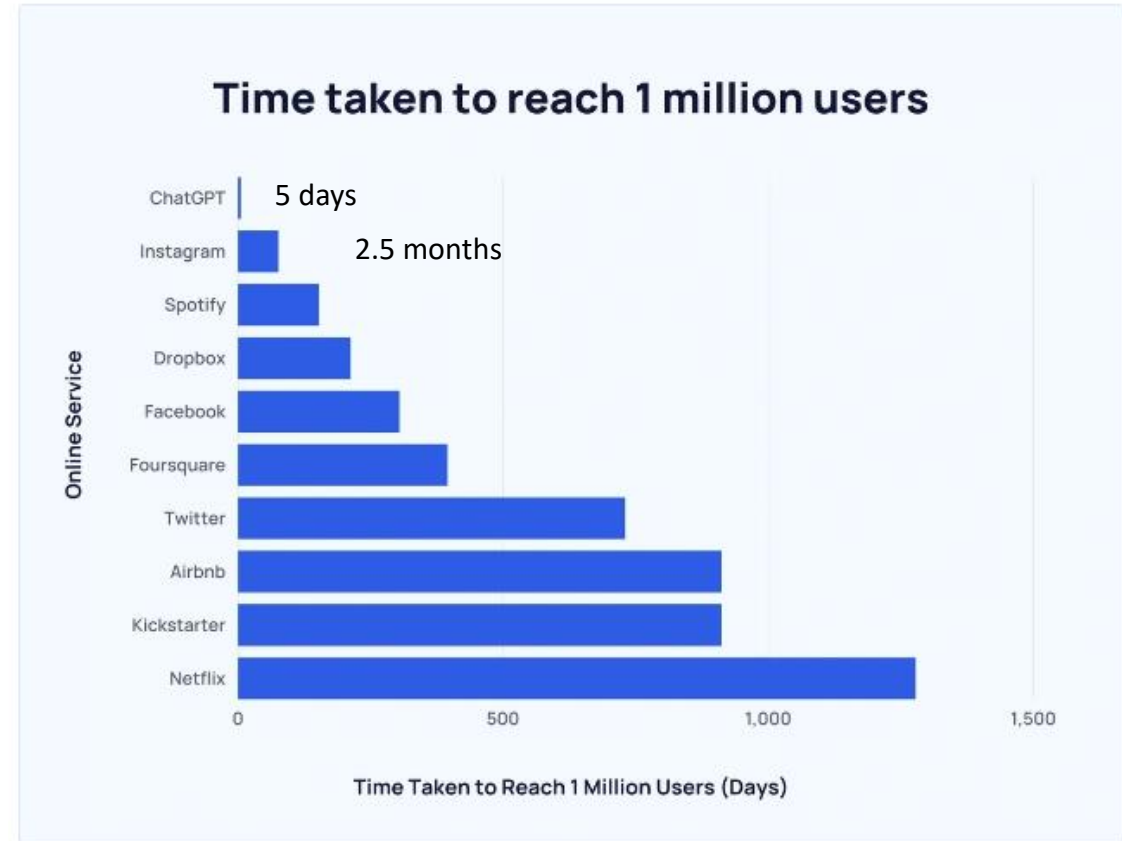
- ChatGPT will be integral to future versions of Microsoft applications, such as Microsoft 365, Power BI and Bing, and will be expected to challenge Google's search technology.

AI Evolution and Rapid Adoption

Common Use Cases

Generating content
Creating images
Developing new drugs
Designing products
Optimizing operations
Personalizing experiences
Protecting data
Making predictions
Solving problems

ChatGPT currently has over **180 million** users (GA to the public November 2022).



Why Such Intense Interest?

Represents a “perfect storm” of “hot” technologies by using:

- A chatbot that enables natural-sounding conversational interactions.
- A large language model (Generative Pre-trained Transformer [GPT]) that performs advanced language-related functions, including language generation, summarization and question answering.

Can hold seemingly intelligent conversations with humans by appearing to understand what they say:

- Interactions with ChatGPT can be humorous and insightful, even profound. But they can also be factually incorrect or biased, despite OpenAI’s improvement efforts so far.
- There is a danger that ChatGPT content that is factually incorrect may be assumed to be correct because it is presented eloquently.
- The terms “understand” and “intelligent” are implicitly human terms; their application to a machine algorithm like that of ChatGPT is highly misleading.

It has massive market implications:

It offers significant potential opportunities, but also entails disruption and risk.

Risks vs. Rewards

Risks/Misuses

Bias/Ethics

Wrong Answers

Copyright Violations

Deepfakes/Misinformation

Fraud

Spam/Phishing

ChatGPT



Capabilities

Text Generation

Text Classification

Text Summarization

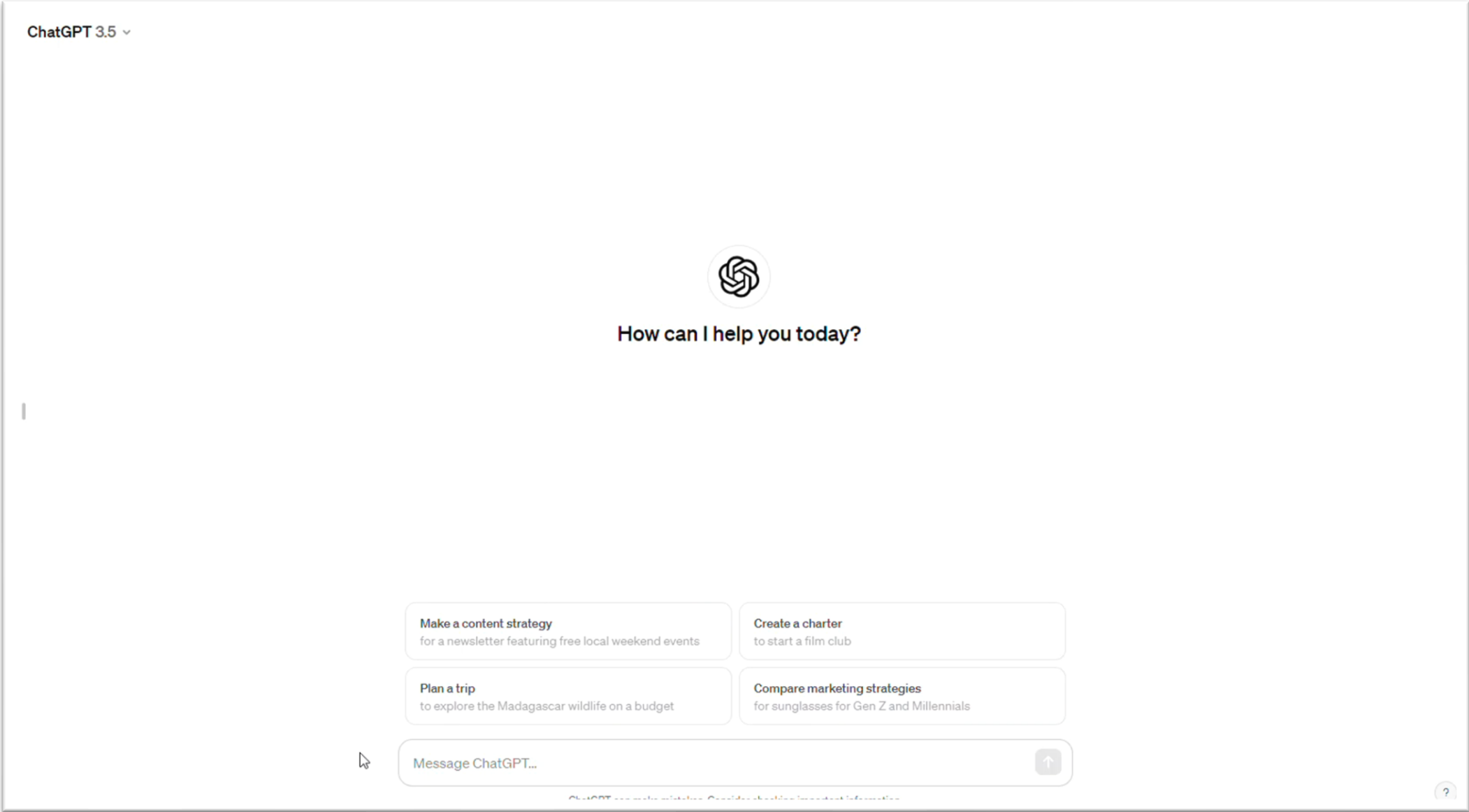
Language Translation

Question Answering

Code Generation


Gartner[®]

ChatGPT General Use – Project Charter



ChatGPT General Use – Project Risks

ChatGPT 3.5 ▾




How can I help you today?


Tell me a fun fact
about the Golden State Warriors

Design a database schema
for an online merch store

Make up a story
about Sharky, a tooth-brushing shark superhero

Write a text
inviting my neighbors to a barbecue

Message ChatGPT... 

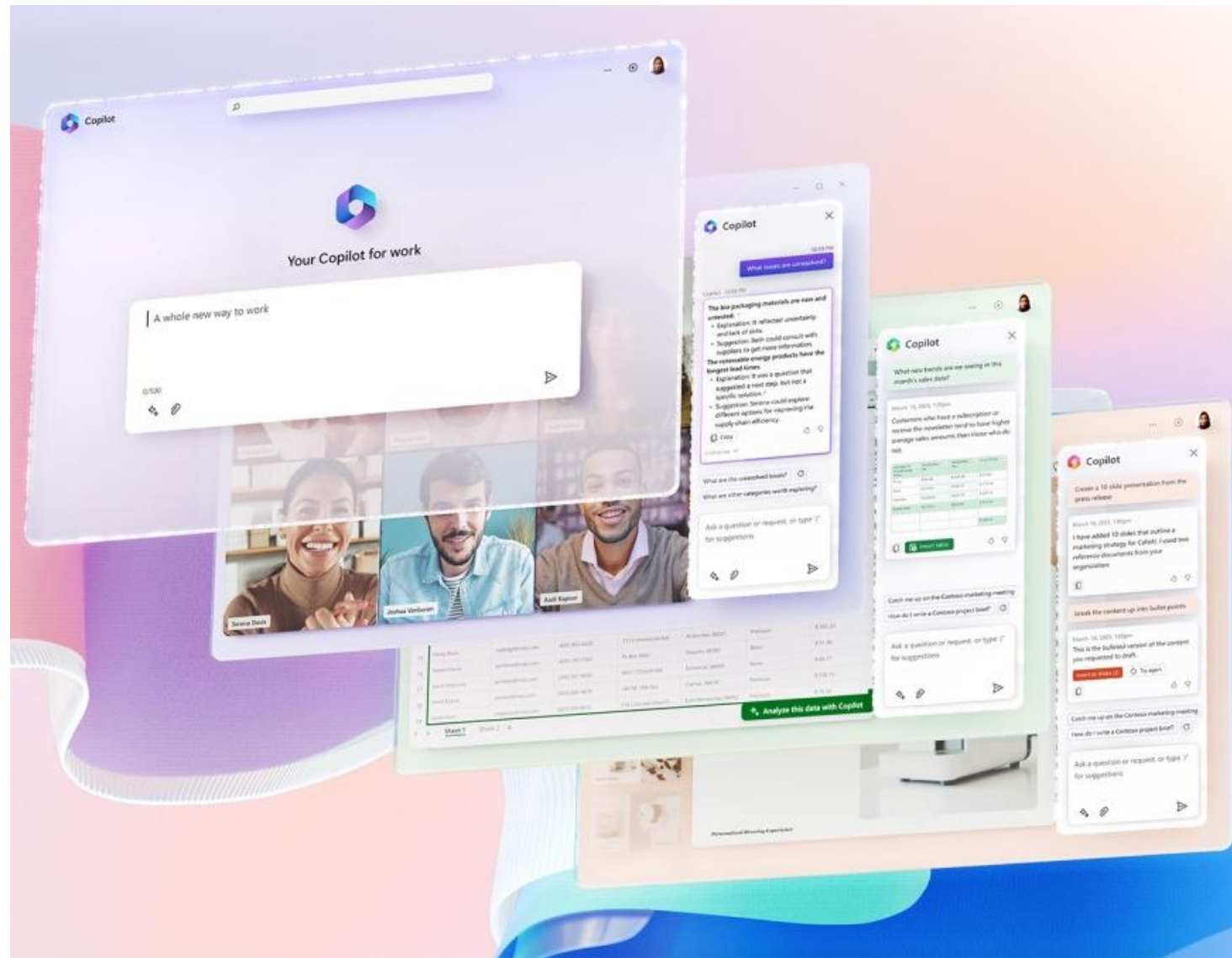
ChatGPT can make mistakes. Consider checking important information. 

Copilot – In Microsoft 365 and Apps

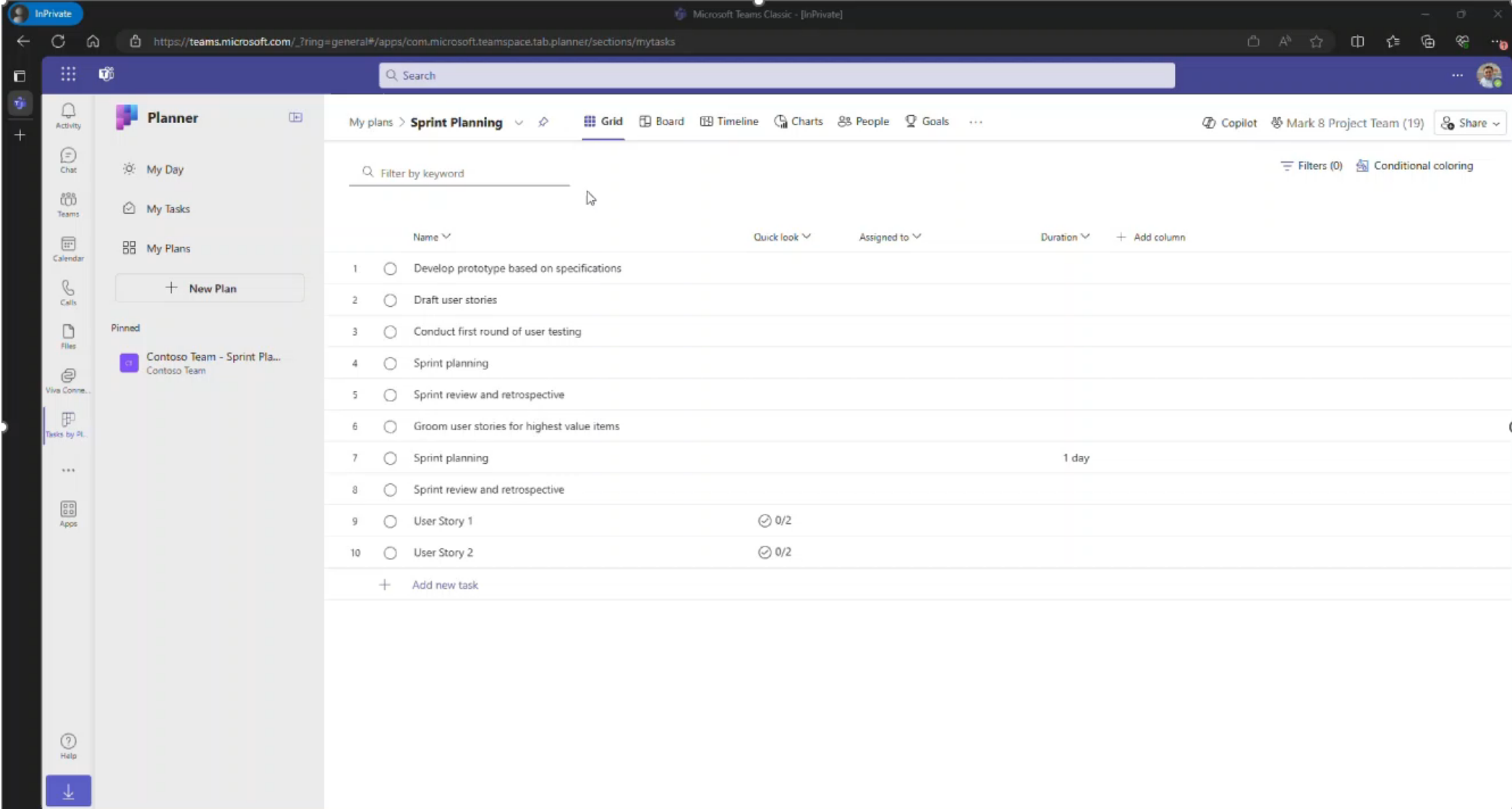
Microsoft Copilot for Microsoft 365 combines the power of large language models (LLMs) with your organization's data to turn your words into one of the most powerful productivity tools on the planet.

It works alongside popular Microsoft 365 apps such as Word, Excel, PowerPoint, Outlook, Teams, and more. Microsoft 365 Copilot provides real-time intelligent assistance, enabling users to enhance their creativity, productivity, and skills.

- ✓ Available as a premium feature
- ✓ Coming to Planner and Planner Premium (Project for the web) in early 2024



Copilot – Microsoft 365

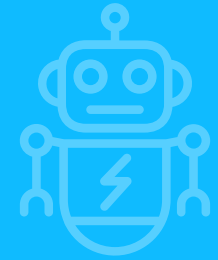


Say Hello to OnePlan's Sofia GPT

"AI as a Collaborator"

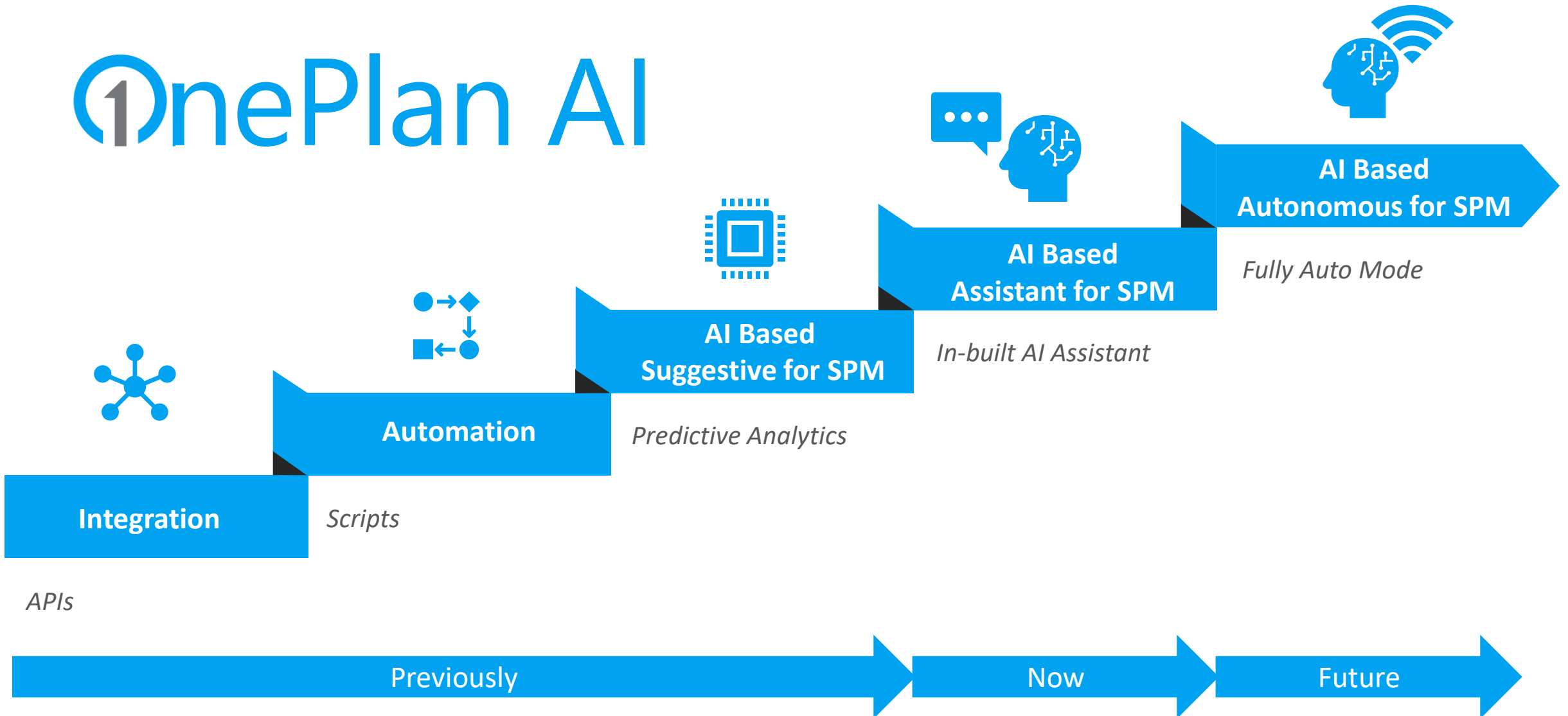
The Revolutionary New Language Model for Project Portfolio and Work Management

- 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 is a **pure-play PPM chatbot** that uses the same underlying data in Azure OpenAI GPT, but is **dedicated to the PPM data in OnePlan**
- 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.



AI Evolution in Portfolio Management

OnePlan AI



Analyst Defined Use Cases for AI in Portfolio Management

Use Case	Description	Benefit	Role
Augmented Data Entry	Create relevant information, such as project details, schedules, and budgets.	Reduce the time and effort required for manual data entry.	Project Manager Portfolio Manager PMO Leads Resource Manager Strategy Planning Leads
Automated Information Retrieval	Analyze SPM data, such as project schedules, resource allocation, and financials, to identify relevant information.	Reduce the time and effort required for analysis and synthesis.	Project Manager Portfolio Manager PMO Leads Resource Manager Strategy Planning Leads
Communication Automation	Automatically communicated to stakeholders, reducing the need for manual communication.	Reduce the time and effort required for generating communication.	Project Manager Portfolio Manager PMO Leads Strategy Planning Leads
Resource Estimation	Estimate the resources required for a project, reducing the risk of over- or under-staffing.	Reduce the time and effort required for resource analysis and estimation.	Resource Manager Project Manager Portfolio Manager PMO Leads
Underperforming Investments	Scrutinize project-related information and pinpoint any projects that are falling short of their objectives or are exceeding their budget.	Complement decision-making processes about whether to proceed with the project or terminate it.	Portfolio Manager PMO Leads Strategy Planning Leads

Analyst Defined Use Cases for AI in Adaptive Portfolio Management

Use Case	Description	Benefit	Role
Forecast Completion and Spending	Identify recurring patterns and trends, which can facilitate precise forecasting.	Efficiently allocate their resources and manage their budgets effectively	Project Manager Portfolio Manager PMO Leads Strategy Planning Leads
Budget and Plan Optimization	Analyze project data to identify areas where budgets can be optimized, such as through resource allocation or process improvements.	Complement decision making on where to allocate resources	Project Manager Portfolio Manager PMO Leads Resource Manager Strategy Planning Leads
Risk Identification	Identify potential risks, such as schedule delays or budget overruns.	Mitigate risks before they become major impacts to an initiative.	Project Manager Portfolio Manager PMO Leads Strategy Planning Leads
Defect Reduction	Scrutinize project data to pinpoint the areas where defects are most likely to transpire	Mitigate risk of defects. Propose improvements.	Project Manager Portfolio Manager PMO Leads
Data Anomalies	Analyze portfolio data to identify patterns or outliers that may indicate errors or anomalies.	Identify and correct data issues to improve PPM Governance.	Portfolio Manager PMO Leads Strategy Planning Leads

Sofia GPT Always Available in OnePlan

OnePlan Strategic Portfolio Manager Daniel Williams HOKU LOGIC

My Portfolio Business Unit 8 items selected

Plan Type: Portfolio Group By: None

Plan Type	Name	Business Unit	State	Status	Schedule Health	Financial Health	Effort Health	Issue Health	Budget	Benefits	Estimated End	% Done (Summary)
Portfolio	Data Analytics Transformation (1)	IT	Active	(1) On Track	(1) On Track	(1) On Track	(1) On Track	(1) On Track	\$3,688,775.59	\$8,514,000.00	06/07/2024	11%
Program	Enterprise Data Platform (10)	IT	Active	(2) At Risk	(2) At Risk	(1) On Track	(1) On Track	(1) On Track	\$3,688,775.59	\$8,514,000.00	06/07/2024	11%
Project	Data Warehouse Migration	IT	Active	(2) At Risk	(1) On Track	(1) On Track	(2) At Risk	(1) On Track	\$722,366.66	\$2,000,000.00	04/17/2024	5%
Project	Predictive Maintenance	IT	Active	(1) On Track	(1) On Track	(1) On Track	(1) On Track	(1) On Track	\$1,429,764.00	\$1,550,000.00	09/14/2023	29%
Project	MS Planner 365	IT	Active	(1) On Track	(1) On Track	(1) On Track	(1) On Track	(1) On Track	\$110,000.00	\$160,000.00	08/24/2023	12%
Epic	IT - Azure DevOps	IT	Active	(1) On Track	(1) On Track	(2) At Risk	(3) Off Track	(1) On Track	\$122,385.00	\$150,000.00	10/25/2023	9%
Project	IT - Smartsheets	IT	Active	(1) On Track	(1) On Track	(1) On Track	(1) On Track	(1) On Track	\$211,439.93	\$1,550,000.00	06/07/2024	10%
Epic	JIRA - Cybersecurity Enhancement	IT	Active	(1) On Track	(2) At Risk	(1) On Track	(1) On Track	(1) On Track	\$368,550.00	\$1,704,000.00	01/02/2024	19%
Project	Project for the Web	IT	Active	(1) On Track	(1) On Track	(2) At Risk	(1) On Track	(1) On Track	\$70,000.00	\$150,000.00	03/22/2023	14%
Project	IT - Project Professional	IT	Active	(1) On Track	(1) On Track	(1) On Track	(3) Off Track	(1) On Track	\$283,770.00	\$500,000.00	07/07/2023	9%
Project	Work Planner	IT	Active	(1) On Track	(1) On Track	(1) On Track	(1) On Track	(1) On Track	\$370,500.00	\$750,000.00	02/13/2024	1%
Operations	IT - Operations	IT	Active	(1) On Track	(1) On Track	(1) On Track	(1) On Track	(1) On Track	\$0.00	\$0.00		0%
Portfolio	Product Innovation Portfolio (1)	Product Development	Active	(1) On Track	(1) On Track	(1) On Track	(1) On Track	(1) On Track	\$4,125,714.37	\$9,440,000.00	02/21/2024	12%
Program	Digital Marketing Program (4)	Product Development	Active	(1) On Track	(1) On Track	(1) On Track	(1) On Track	(1) On Track	\$4,125,714.37	\$9,440,000.00	02/21/2024	12%
Project	Market Research	Product Development	On Hold	(3) Off Track	(3) Off Track	(1) On Track	(1) On Track	(1) On Track	\$345,674.50	\$1,200,000.00	07/19/2023	32%
Epic	Concept Development	Product Development	Active	(2) At Risk	(2) At Risk	(1) On Track	(1) On Track	(1) On Track	\$977,523.20	\$5,000,000.00	02/21/2024	0%
Epic	Product Launch	Product Development	Active	(2) At Risk	(1) On Track	(2) At Risk	(1) On Track	(1) On Track	\$1,366,356.67	\$2,040,000.00	12/06/2023	26%
Epic	Product Dev - Azure DevOps	Product Development	Active	(1) On Track	(1) On Track	(1) On Track	(1) On Track	(1) On Track	\$1,436,160.00	\$1,200,000.00	11/08/2023	13%
Portfolio	Brand Management Portfolio (1)	Marketing	Active	(2) At Risk	(1) On Track	(1) On Track	(1) On Track	(1) On Track	\$2,084,850.00	\$2,120,000.00	12/29/2023	
Program	Brand Management (4)	Marketing	Active	(3) Off Track	(2) At Risk	(3) Off Track	(3) Off Track	(1) On Track	\$2,084,850.00	\$2,120,000.00	12/29/2023	

Ask Sofia

@OnePlanData ✕

? Examples

"Please provide me with a summary of the data in my portfolio"

"Rank Plans by the highest risk of failure and explain"

"Could you examine the trends and provide a summary of the current state of my portfolio?"

"Are there any conflicts or overlaps between the plans that need to be addressed?"

⚡ Capabilities

Ask a question

Content creation

Analyze data in the current view

! Limitations

To analyze data efficiently, filters may be needed to narrow the scope of analysis due to capacity constraints

May occasionally generate incorrect information

May occasionally produce harmful instructions or biased content

Powered by Azure OpenAI

Ask me anything here.

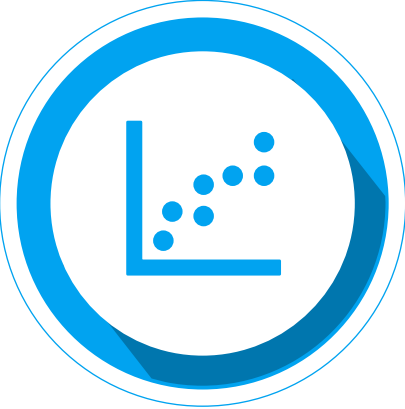


Sample Use Cases for AI in Portfolio Management



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

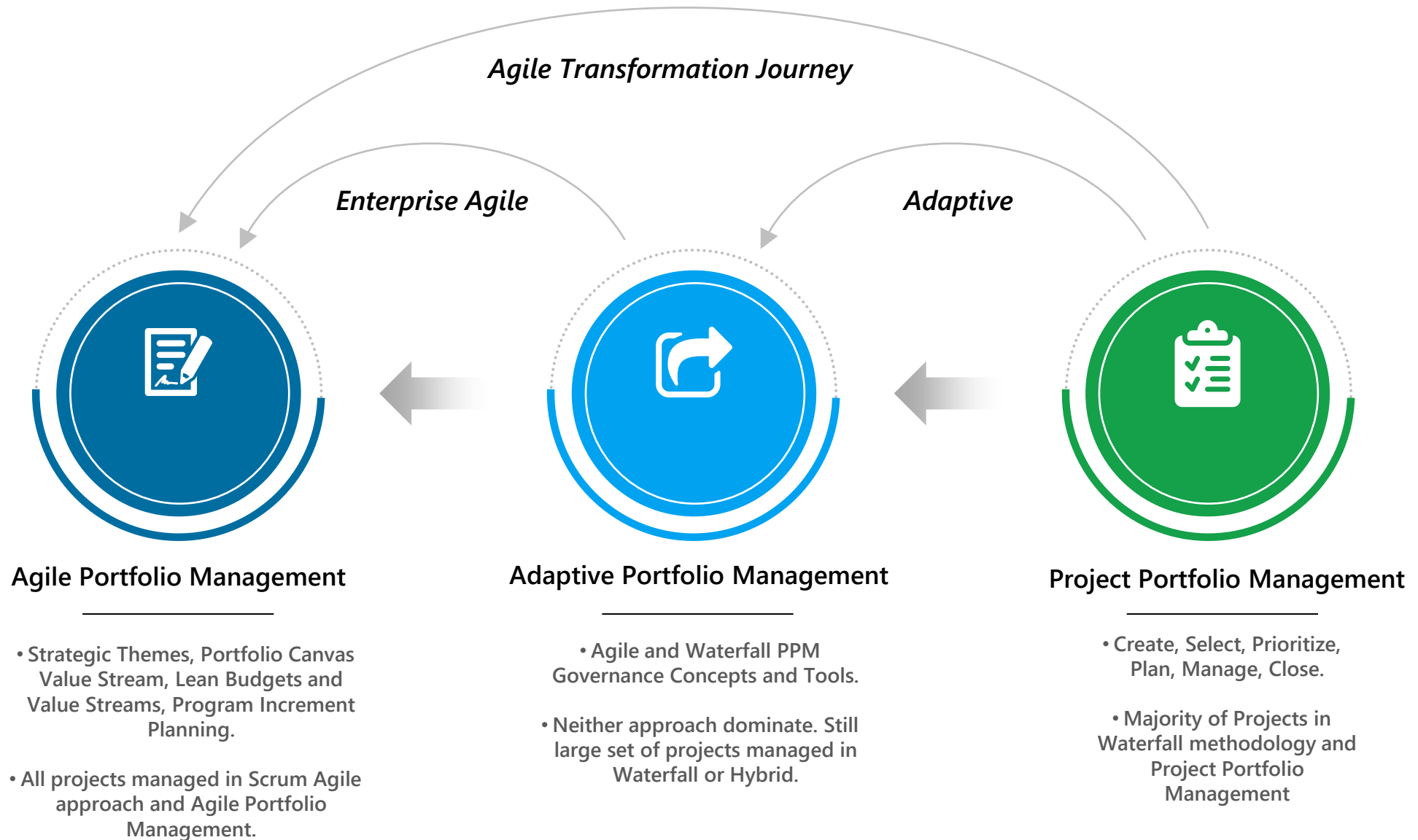
OnePlan's Sofia GPT helps organizations optimize resource allocation across projects and teams.



Investment Forecasting

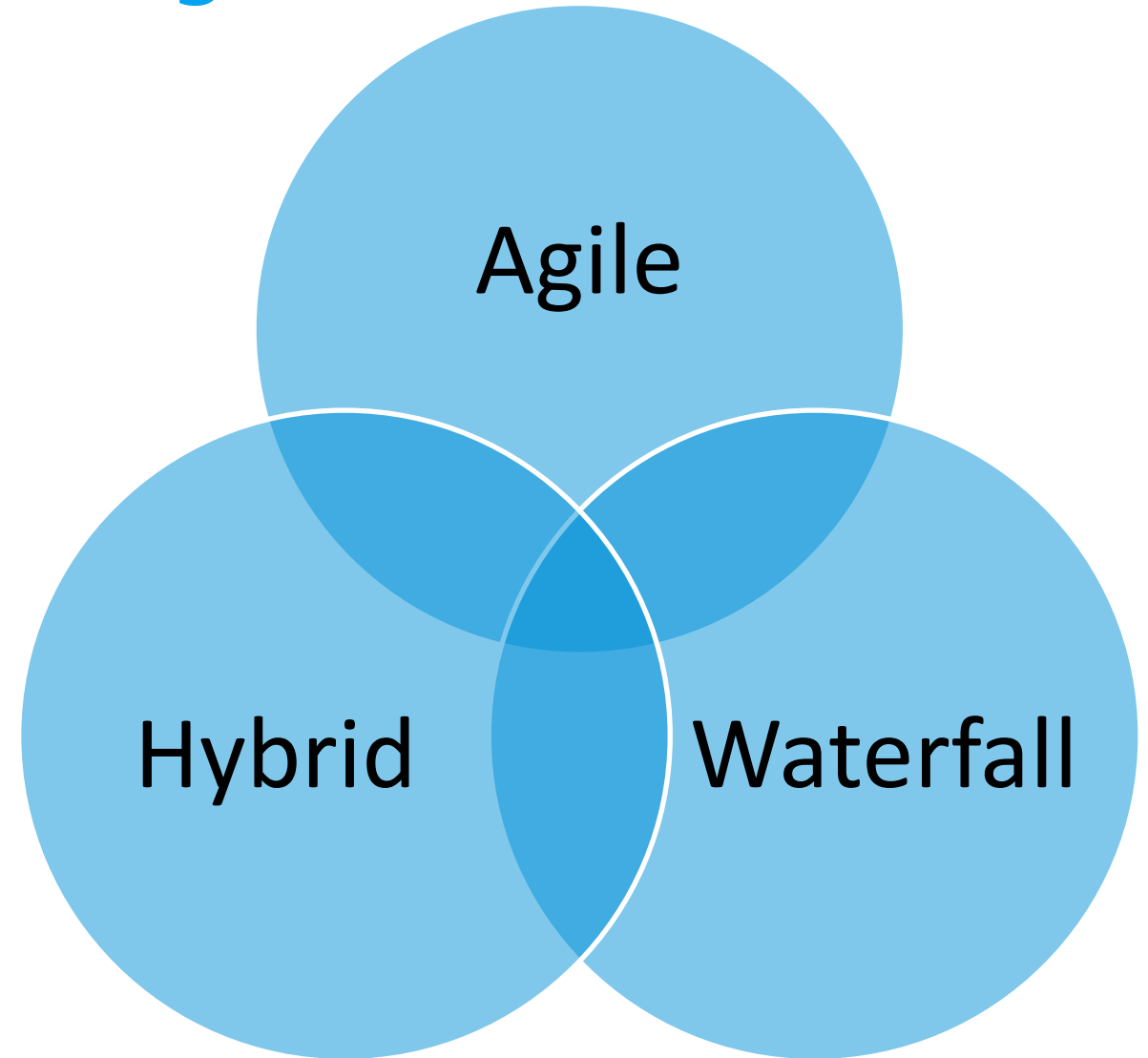
OnePlan's Sofia GPT helps organizations manage project costs, budgets, and forecasts.

Why Adaptive Portfolio Management?



















































































Different Execution Methodologies

- Agile continues to grow
- Waterfall is still widely used
- Agile variants
- Hybrid methodologies
- Personalized, cherry-picked versions

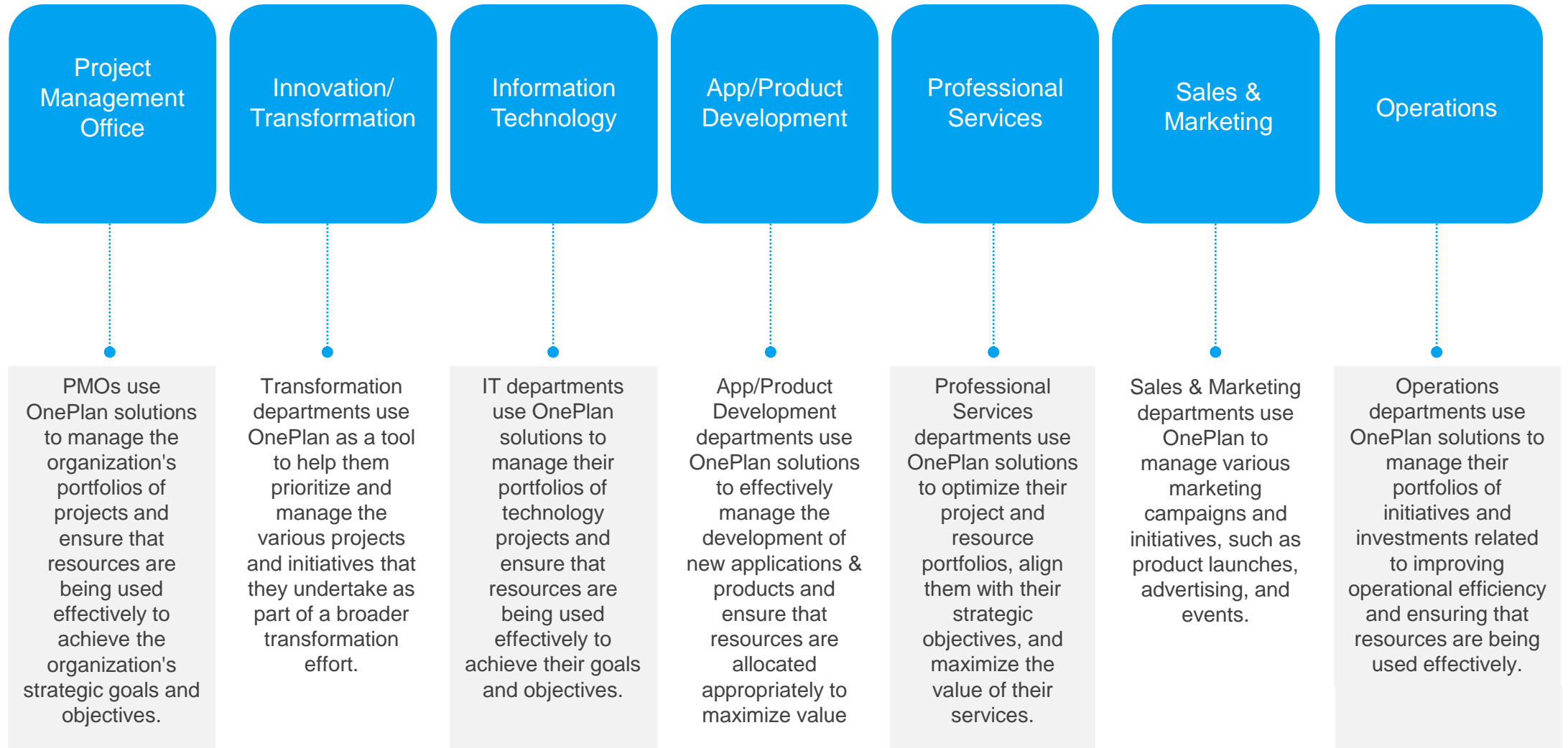


Proliferation of Tools Across the Organization

	PMO	Marketing	Finance	Application Development	Operational Excellence	NPD	Engineering
Demand Management	 				 	 	
Portfolio Management	 					 	 
Project Management	      	    	    	    	  	    	  
Time Management	 	 	 	  		 	
Reporting & Analysis	 	 	 	 		  	 

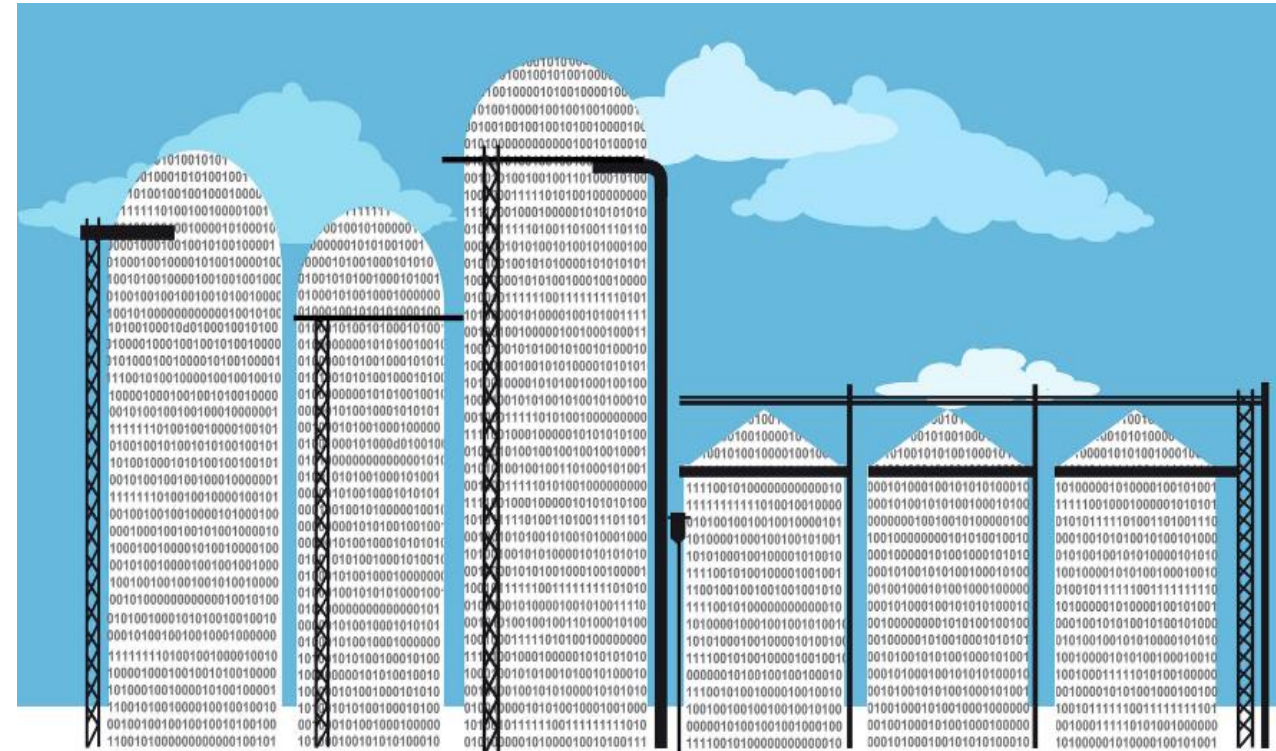


Enterprise-wide and Cross-Functional Efforts

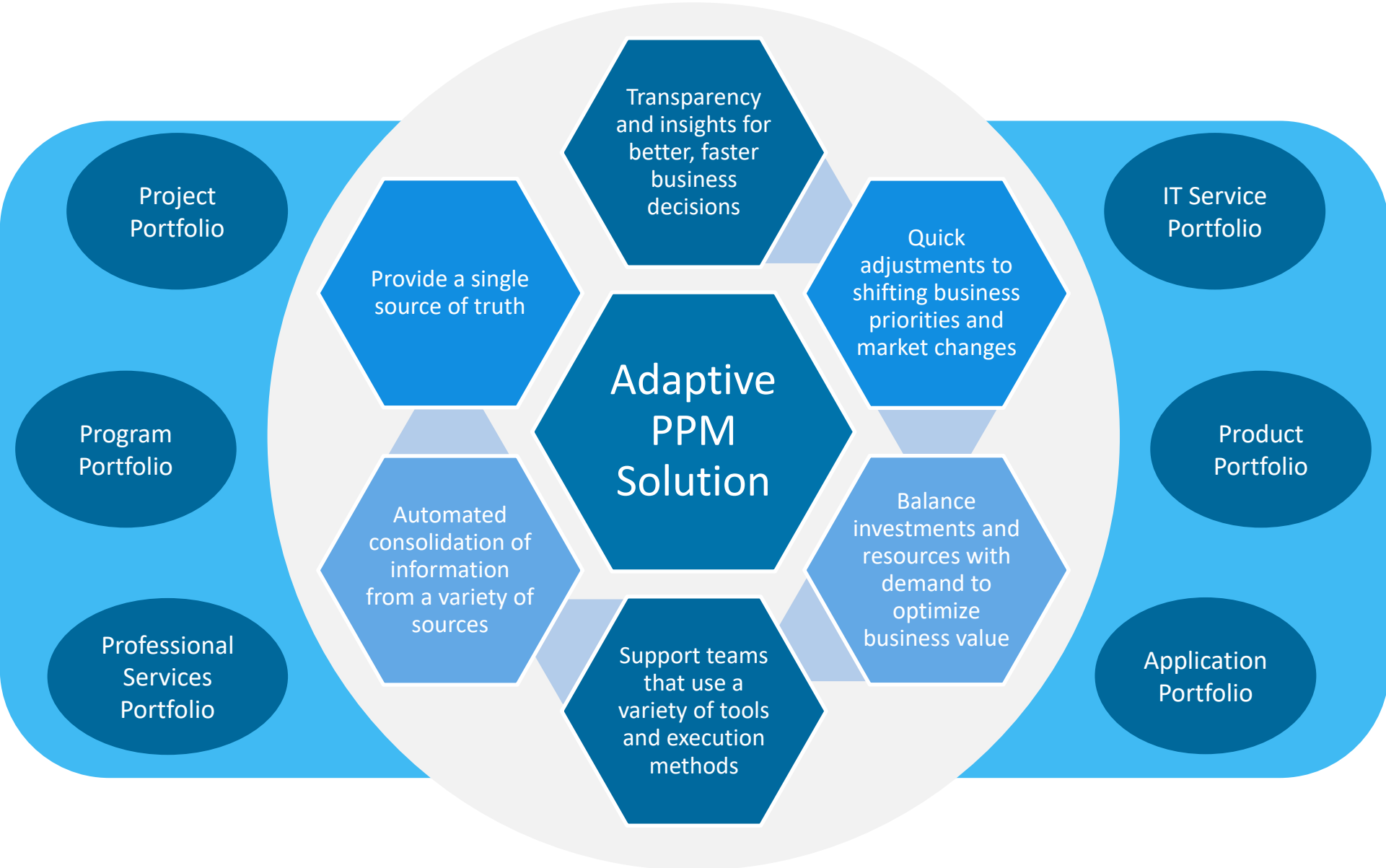


Information Silos Breed Increased Costs and Inefficiencies

- Manual mash-ups of data from multiple tools and data sources
- Manual report creation, formatting and updating
- Packaging and distribution of reports to different stakeholders and organizational levels
- Duplication of data entry is time consuming and prone to errors
- Disconnected information difficult to remain accurate and current across the board
- Chasing team members for status and updates
- Tracking completeness and timeliness of submissions
- Comprehensive resource planning typically is its own separate data silo that is disconnected

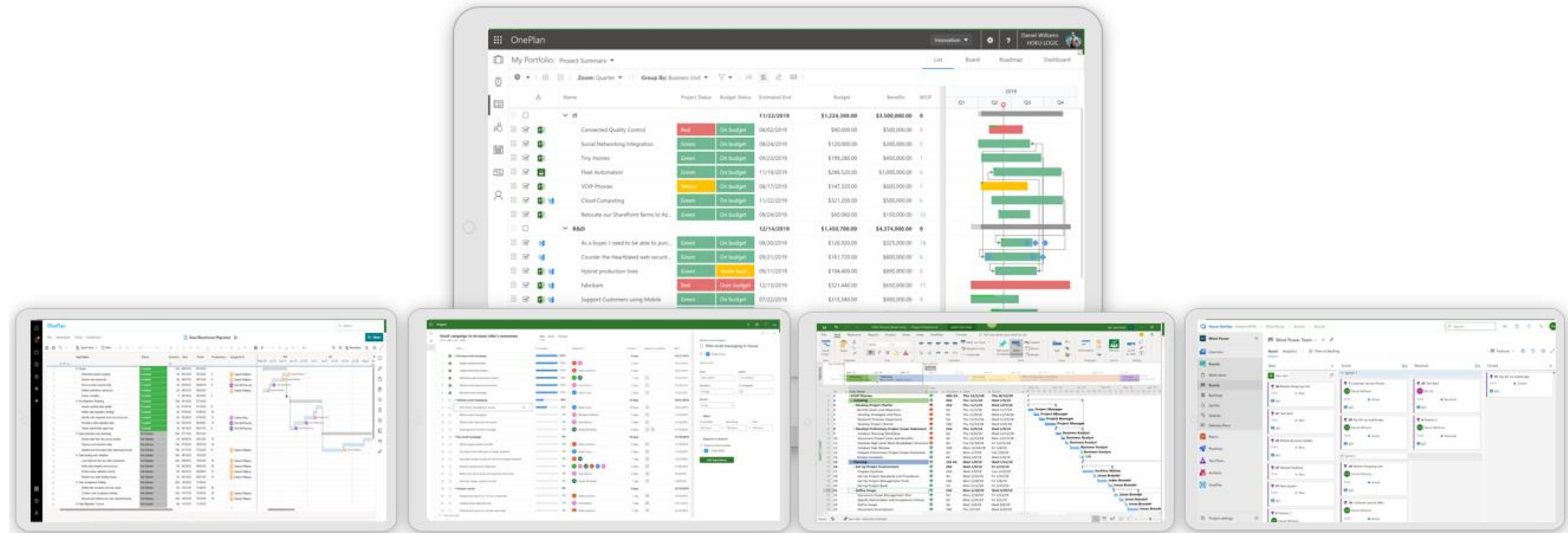


Elements of Adaptive PPM



OnePlan

Adaptive Portfolio Management – Power to Choose



Smartsheet



Project for the web



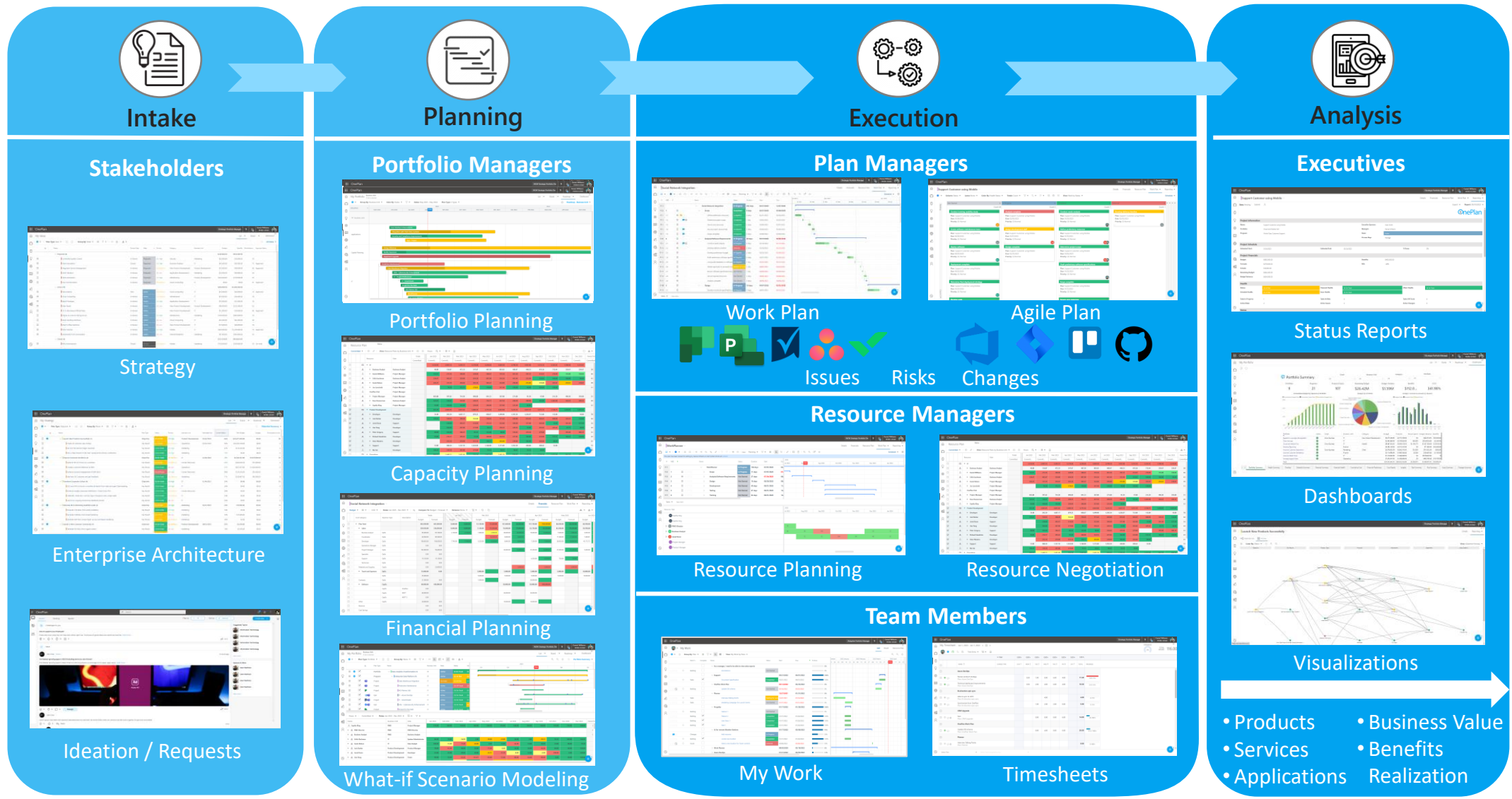
Project Professional



Azure DevOps

Comprehensive portfolio management capabilities supporting multiple methodologies and tools

OnePlan Capabilities, Roles, and Process Flow



Artificial Intelligence – Sofia GPT 

Do the right work  Do the work right

OneConnect Integration Platform

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





Demonstration

AI-Driven Strategic Planning with OnePlan

- **Increased Productivity:** Sofia GPT's AI-based strategic planning tools can help to increase productivity by streamlining the OKR development process, reducing manual input, and automating routine tasks.
- **Improved Alignment:** Sofia GPT can help to align organizational objectives with individual and team OKRs. By analyzing business performance metrics and identifying areas for improvement, Sofia GPT can inform the development of OKRs and ensure alignment with overall organizational objectives.
- **Data-Driven Decision Making:** Sofia GPT can analyze OKRs and related data to identify patterns, opportunities, and potential risks. It can use predictive analytics to forecast OKR outcomes and identify potential roadblocks. This can help stakeholders make data-driven decisions to achieve their strategic goals.
- **Optimization:** Sofia GPT can analyze OKRs and provide recommendations to optimize outcomes. By recommending adjustments to OKRs, resource allocations, and other factors, Sofia GPT can maximize OKR success and improve business outcomes.



Analyze data to identify patterns, opportunities, and potential risks

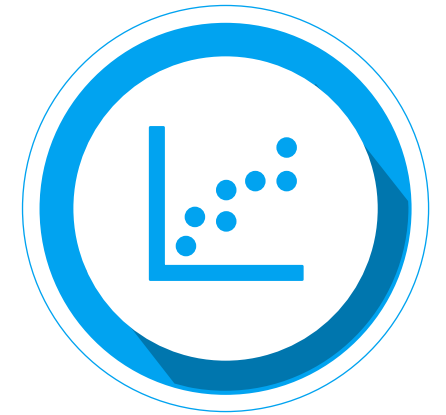
OnePlan | Strategic Portfolio Manager | Daniel Williams HOKU LOGIC

My Strategy | List | Board | Roadmap | Dashboard

Plan Type: Objective | Group By: None | !Objective Summary

Name	Plan Type	Status	Priority	Business Unit	Estimated End	Plan Budget	Current Metric
Launch New Products Successfully (3)	Objective	(2) At Risk	(1) High	Product Develop	01/23/2023	\$28,133,893.00	64%
Create 20 customer case studies	Key Result	(2) At Risk	(2) Medium	Operations	03/02/2022	\$24,363,238.00	50%
Get into the Gartner Magic Quadrant	Key Result	(1) On Track	(1) High	Marketing		\$314,220.00	67%
Win a "Best Product of the Year" award at the industry conference	Key Result	(1) On Track	(1) High	Marketing		\$3,456,435.00	75%
Improve Customer Excellence (4)	Objective	(1) On Track	(2) Medium	IT	12/29/2023	\$1,420,552.00	78%
Achieve NPS of 9 from our customers	Key Result	(2) At Risk	(2) Medium	Human Resource		\$439,942.50	89%
Increase Customer Retention to 98%	Key Result	(1) On Track	(3) Low	Operations		\$627,872.00	81%
Achieve a product engagement of 80% WAU	Key Result	(3) Off Track	(1) High	Human Resource		\$124,250.00	69%
Interview 20 Customers and get Feedback	Key Result	(1) On Track	(2) Medium	Marketing		\$228,487.50	75%
Transform Corporate Culture (4)	Objective	(1) On Track	(1) High	IT	12/14/2023	\$1,338,888.00	37%
CEO and SVPs to launch a monthly all-hands Town Halls and open Q&A me	Key Result	(1) On Track	(1) High	IT		\$36,456.00	25%
Achieve a weekly Employee Satisfaction / Pulse Score of 8+	Key Result	(1) On Track	(2) Medium	Human Resource		\$643,533.00	50%
Celebrate "small wins" and any type of progress every single week	Key Result	(1) On Track	(2) Medium	IT		\$634,554.00	23%
Launch an ongoing closed-loop feedback process	Key Result	(1) On Track	(3) Low	IT		\$24,345.00	50%
Generate More Marketing Qualified Leads (3)	Objective	(2) At Risk	(1) High	Marketing	10/27/2023	\$360,634.00	34%
Generate 150 MQLs from email marketing	Key Result	(1) On Track	(1) High	Marketing		\$345,634.00	33%
Generate 100MQLs from email marketing	Key Result	(2) At Risk	(3) Low	Marketing		\$15,000.00	

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%

Budget and Plan Optimization - Intake Lead – Select Projects based on criteria

OnePlan
IDEMO Strategic Portfolio M
Settings
Help
Notifications
Daniel Williams
HOKU LOGIC

My Ideas

Plan Type: Idea | Group By: None

Name	Process Step	State	Priority	Category	Goals	Investment Ho...	Business Unit	Approval Status	Budget	ROI ↓	Prioritizat
Automobile Fuel Consumption	New	Active	(3) Low	Internal Readine	Grow Business	Horizon 1	Marketing		US\$67,000.00	348%	
Delivering Agile Solutions	In Review	Active	(2) Medium	Application Dev	Transformation	Horizon 1	IT		US\$203,500.00	328%	
Integrated Service Management	In Review	Active	(2) Medium	New Product De	Customer Satisf.	Horizon 1	Product Develop		US\$10,000.00	300%	
Wind Turbines	New	Active	(3) Low	Mobile	Grow Business	Horizon 2	IT		US\$430,000.00	191%	
Engine as a Service (flying hours)	In Review	Active	(1) High	Maintenance	Grow Business	Horizon 3	Marketing		US\$140,000.00	186%	
Business Intelligence	In Review	On Hold	(1) High	Internal Readine	Run Business	Horizon 1	Product Develop		US\$32,554.00	179%	
Solar Panels	In Review	Active	(3) Low	New Product De	Grow Business	Horizon 2	Product Develop		US\$80,000.00	178%	
Smart Coffee Machines	New	Active	(3) Low	New Product De	Grow Business	Horizon 2	IT		US\$15,000.00	167%	
Underwater Blue Carbon Markets	New	Active	(1) High	Business Analyti	Grow Business	Horizon 3	IT		US\$67,000.00	161%	
Data Analysis	In Review	Active	(2) Medium	Security	Run Business	Horizon 1	Marketing		US\$5,000.00	160%	
CO-2-Absorbing Artificial Trees	In Review	Active	(1) High	New Product De	Grow Business	Horizon 3	IT		US\$12,000.00	150%	
Smart Elevators	New	Proposed	(3) Low	Application Dev	Grow Business	Horizon 2	Marketing		US\$32,000.00	150%	
Tiny Homes	Closed	Closed	(3) Low	Other	Grow Business	Horizon 2	Product Develop	Approved	US\$34,534.00	125%	
Plant Automation to Incease Capacity Throug	New	Proposed	(1) High	Maintenance	Transformation	Horizon 1	Product Develop		US\$320,000.00	125%	
Waterproof Components	In Review	Proposed	(2) Medium	Other	Run Business	Horizon 1	Product Develop		US\$41,000.00	120%	
Smart Vending Machines	In Review	Proposed	(3) Low	Cloud Computin	Grow Business	Horizon 2	IT		US\$123,000.00	114%	
Mass import function to speed up date pop	Closed	Closed	(2) Medium	New Product De	Run Business	Horizon 1	IT	Rejected	US\$12,000.00	100%	
Cloud Computing	In Review	Proposed	(2) Medium	Maintenance	Transformation	Horizon 1	IT		US\$18,000.00	89%	
401k Enhancement	Closed	Closed	(2) Medium	Mobile	Run Business	Horizon 1	Marketing	Approved	US\$120,000.00	67%	
Fleet Automation	In Review	Active	(3) Low	Business Analyti	Grow Business	Horizon 2	IT	Approved	US\$45,000.00	44%	
Packaging Redesign to Reduce Plastic Use	New	Proposed	(2) Medium	Other	Run Business	Horizon 1	IT		US\$150,000.00	33%	

Ask Sofia

@OnePlanData

Examples

- "Please provide me with a summary of the data in my portfolio"
- "Rank Plans by the highest risk of failure and explain"
- "Could you examine the trends and provide a summary of the current state of my portfolio?"
- "Are there any conflicts or overlaps between the plans that need to be addressed?"

Capabilities

- Ask a question
- Content creation
- Analyze data in the current view

Limitations

- To analyze data efficiently, filters may be needed to narrow the scope of analysis due to capacity constraints
- May occasionally generate incorrect information
- May occasionally produce harmful instructions or biased content

Powered by Azure OpenAI

Ask me anything

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.



Augmented Data Entry – Project Manager Business Case Definition

OnePlan

IDEMO Strategic Portfolio M

Daniel Williams
HOKU LOGIC

Framework to port applications to ...

Details Financials Resource Plan Work Plan Reporting

Create Select **Plan** Manage Close

Project Information

Name:	Framework to port applications to all devices	Priority:	(3) Low
Portfolio:	Cloud and Mobile First	Category:	Business Analytics
Program:	World-Class Customer Support	Goals:	Transformation
Business Unit:	Product Development	Default Task Mode:	Auto Schedule
Manager:	Daniel Williams	Default Task Type:	Fixed Duration/Effort Driven
Executive Sponsor:		Timesheet Type:	Open To Everyone
State:	Active	Timesheet Charge:	Task Level
Stage:	(3) Plan	Jira Project Names:	

Project Business Case

Description:

Business Case:

Value Statement:



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 status icons (red X, yellow triangle, or shield) and "View Details" links. The items are: "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", and "You have some plans that have tasks to approve".
- Recent Conversations:** Two chat messages. The first is about "Server Upgrades" and the second is about "Support Customer using Mobile App".
- Plans:** A table with columns for Name, Compliance, Plan Type, and Last Accessed. It lists three plans: "Grow Future Home Automation" (100% compliance), "Increase Customer Retention to 98%" (50% compliance), and "Support Customer using Mobile App" (100% compliance).
- 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.

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

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%										

What resources do I need to hire?

OnePlan Strategic Portfolio Manager Daniel Williams HOKU LOGIC

Resource Plan Status

Committed View: Resource Summary Hours

Resource	Business Unit	Role	Totals						
			Jan 2023	Feb 2023	Mar 2023	Apr 2023	May 2023	Jun 2023	Jul 2023
Adam Barr	Marketing	Specialist	32.00	161.21	283.88	224.24	275.88	156.12	31
Anthony Harris	Finance	Coordinator	172.00	82.67	132.00	132.00	265.33	30.00	3
Brian Anderson	Finance	Business Analyst	388.00	152.00	196.00	294.00	144.00	76.00	3
Business Analyst	IT	Business Analyst	48.80	156.87	473.33	347.67	467.50	893.83	48
Chris Evans	Marketing	Coordinator	88.00	176.00	556.00	142.00	230.00		4
Clark Smith	Operations	Specialist	61.60	221.33	457.73	76.33	214.73	68.27	15
Coordinator	Finance	Coordinator							
Daniel Williams	IT	Project Manager	152.67	211.56	388.00	328.00	588.67	776.56	66
Developer	Product Development	Developer	34.40	202.50	1,007.17	879.33	668.67	1,499.90	1,50
Erlich bachman	IT	Business Analyst	238.67	462.67	329.00	654.50	897.00	516.56	46
Gavin Belson	IT	Project Manager	292.27	317.39	450.02	505.36	503.47	344.00	25
George Robinson	Human Resources	Coordinator	98.67	72.00	621.33	234.67	204.67	152.67	13
Jack Barker	Product Development	Developer	170.67	550.93	308.40	163.60	730.26	771.43	83
Jack Summer	Human Resources	Business Analyst		175.20	392.40	256.40	192.00	96.00	
James Garcia	Finance	Business Analyst	364.29	325.71	474.00	288.00	80.00	8.00	
Jared Dunn	Product Development	Support		128.00	492.67	414.00	373.33	352.00	56
Jian Yang	Product Development	Developer		104.00	297.00	217.00	93.33	358.43	
Joe Larscheid	IT	Project Manager		74.38	172.72	178.91	119.60	247.40	12

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								

Help me write a project summary email to my manager

OnePlan !DEMO Strategic Portfolio M ⚙️ ? 🔒 Daniel Williams HOKU LOGIC 

My Portfolio List ▾ Board ▾ Roadmap ▾ Dashboard 📄

Plan Type: 2 Types ▾ + − ☰ 🔍 ☰ 📄 📄 📄 👤 📧 📧 🔄 Project Data ▾

	Plan Type	Name	State	Status	Compliance	Schedule Health	Financial Health	Effort Health	Issue Health	Budget
☰	Project	Support Customer using Mobile App	Active	(1) On Track	100%	(2) At Risk	(3) Off Track	(1) On Track	(1) On Track	\$1,032,331.00
💡	Project	Framework to port applications to all dev	Active	(2) At Risk	86%	(2) At Risk	(2) At Risk	(1) On Track	(1) On Track	\$251,170.00
☰	Project	Service interface to support Rest API	Active	(1) On Track	86%	(1) On Track	(1) On Track	(1) On Track	(1) On Track	\$281,805.00
☰	Epic	Fabrikam	On Hold	(1) On Track	100%	(1) On Track	(1) On Track	(1) On Track	(1) On Track	\$307,080.00
☰	Epic	Counter the Heartbleed web security bug	Active	(2) At Risk	100%	(2) At Risk	(1) On Track	(1) On Track	(1) On Track	\$279,400.00
☰	Project	VOIP Phones	Active	(1) On Track	100%	(1) On Track	(1) On Track	(1) On Track	(1) On Track	\$271,750.00
☰	Project	Microsoft Teams Integration and messagi	Active	(1) On Track	86%	(1) On Track	(1) On Track	(1) On Track	(1) On Track	\$259,495.00
☰	Project	Ai for remote Weather Stations	Active	(1) On Track	100%	(1) On Track	(1) On Track	(1) On Track	(1) On Track	\$340,442.50
☰	Project	Server Upgrades	Active	(1) On Track	86%	(1) On Track	(1) On Track	(1) On Track	(1) On Track	\$288,560.00
☰	Project	Improve User Experience	Active	(1) On Track	100%	(1) On Track	(1) On Track	(1) On Track	(1) On Track	\$249,416.67
☰	Project	iOS Apps for Metro Transit Authority	Active	(2) At Risk	100%	(2) At Risk	(1) On Track	(2) At Risk	(1) On Track	\$277,831.67
☰	Epic	New Customer Support Portal	Proposed	(1) On Track	86%	(1) On Track	(1) On Track	(1) On Track	(1) On Track	\$194,604.00
☰	Project	Management requires a better sales repo	Active	(2) At Risk	86%	(1) On Track	(1) On Track	(1) On Track	(2) At Risk	\$201,007.50
☰	Epic	As a manager, I need to be able to view s	Proposed	(1) On Track	86%	(1) On Track	(1) On Track	(1) On Track	(1) On Track	\$252,400.00
☰	Epic	Customer Feedback Interface	Proposed	(1) On Track	86%	(1) On Track	(1) On Track	(1) On Track	(1) On Track	\$279,800.00
☰	Project	EHR Implementation	Active	(3) Off Track	86%	(1) On Track	(1) On Track	(3) Off Track	(1) On Track	\$253,840.00
☰	Project	Social Networking Integration	Proposed	(1) On Track	100%	(1) On Track	(1) On Track	(1) On Track	(1) On Track	\$203,07



Augmented Data Entry – Project Manager Status Report Narrative

OnePlan | DEMO Strategic Portfolio IV | Daniel Williams HOKU LOGIC

My Portfolio | List | Board | Roadmap | Dashboard

Plan Type: 2 Types | Group By: None

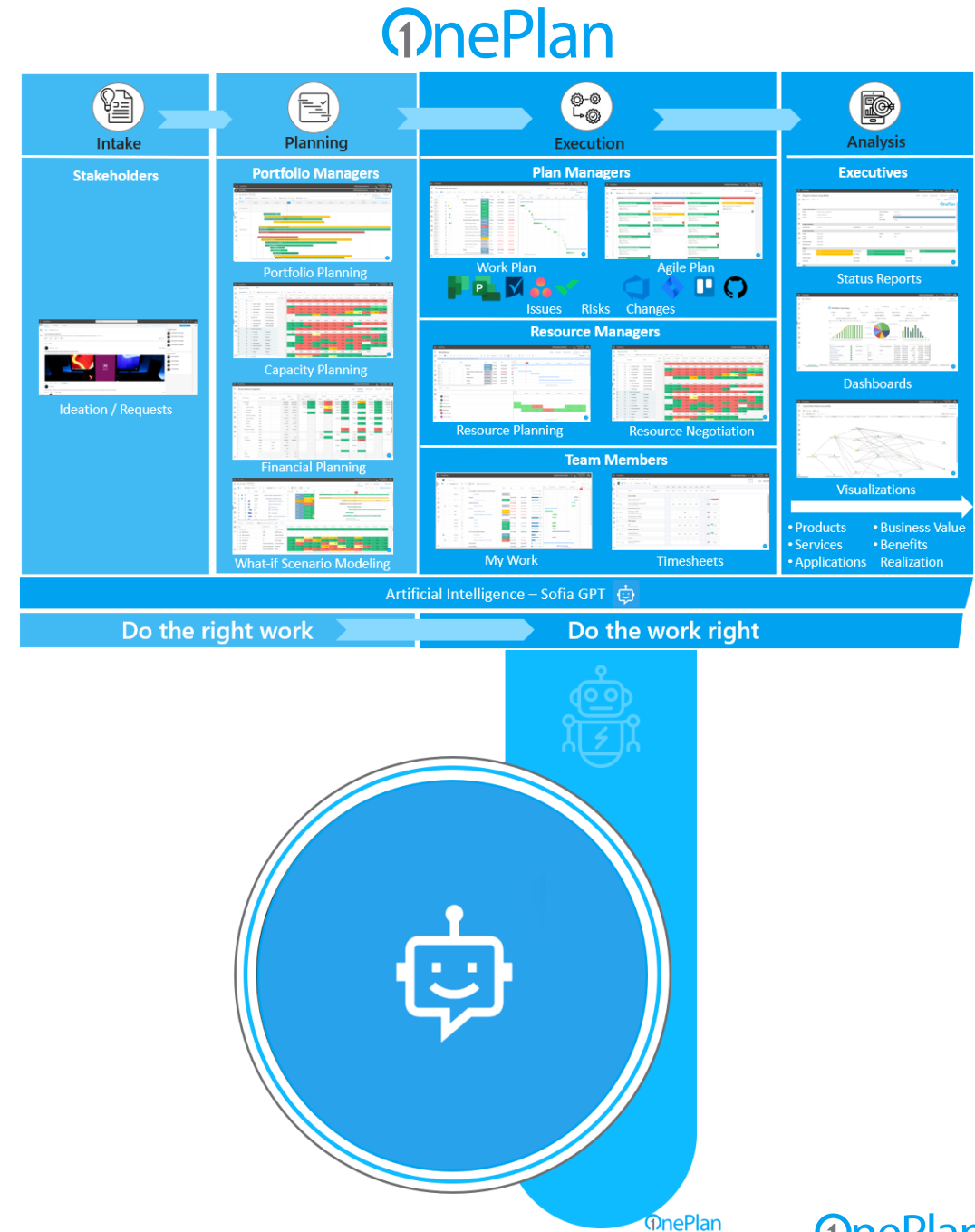
Plan Type	Name	State	Status	Compliance	Schedule Health	Financial Health	Effort Health	Issue Health	Budget	Benefits	Modified	Estimated End	% Done (Summary)
Project	Support Customer using Mobile App	Active	(1) On Track	100%	(2) At Risk	(3) Off Track	(1) On Track	(1) On Track	US\$1,032,331.00	US\$412,500.00	05/10/2023	09/23/2024	39%
Project	Framework to port applications to all de	Active	(2) At Risk	86%	(2) At Risk	(2) At Risk	(1) On Track	(1) On Track	US\$251,170.00	US\$550,000.00	04/25/2023	06/26/2024	28%
Project	Service interface to support Rest API	Active	(1) On Track	86%	(1) On Track	(1) On Track	(1) On Track	(1) On Track	US\$281,805.00	US\$550,000.00	04/25/2023	09/12/2024	32%
Epic	Fabrikam	On Hold	(1) On Track	100%	(1) On Track	(1) On Track	(1) On Track	(1) On Track	US\$307,080.00	US\$780,000.00	04/27/2023	06/21/2023	0%
Epic	Counter the Heartbleed web security bug	Active	(2) At Risk	100%	(2) At Risk	(1) On Track	(1) On Track	(1) On Track	US\$279,400.00	US\$504,166.67	04/25/2023	06/27/2023	66%
Project	VOIP Phones	Active	(1) On Track	100%	(1) On Track	(1) On Track	(1) On Track	(1) On Track	US\$271,750.00	US\$1,200,000.00	05/10/2023	01/08/2024	20%
Project	Microsoft Teams Integration and messag	Active	(1) On Track	86%	(1) On Track	(1) On Track	(1) On Track	(1) On Track	US\$259,495.00	US\$25,250.00	05/16/2023	01/12/2024	11%
Project	Ai for remote Weather Stations	Active	(1) On Track	100%	(1) On Track	(1) On Track	(1) On Track	(1) On Track	US\$340,442.50	US\$400,000.00	05/16/2023	01/29/2024	22%
Project	Server Upgrades	Active	(1) On Track	86%	(1) On Track	(1) On Track	(1) On Track	(1) On Track	US\$288,560.00	US\$110,000.00	04/27/2023	01/29/2024	30%
Project	Improve User Experience	Active	(1) On Track	100%	(1) On Track	(1) On Track	(1) On Track	(1) On Track	US\$249,416.67	US\$50,000.00	03/03/2023	03/29/2024	35%
Project	iOS Apps for Metro Transit Authority	Active	(2) At Risk	100%	(2) At Risk	(1) On Track	(2) At Risk	(1) On Track	US\$277,831.67	US\$560,000.00	04/25/2023	12/28/2023	21%
Epic	New Customer Support Portal	Proposed	(1) On Track	86%	(1) On Track	(1) On Track	(1) On Track	(1) On Track	US\$194,604.00	US\$110,000.00	12/23/2022	08/15/2023	0%
Project	Management requires a better sales rep	Active	(2) At Risk	86%	(1) On Track	(1) On Track	(1) On Track	(2) At Risk	US\$201,007.50	US\$1,200,001.00	04/25/2023	01/24/2024	19%
Epic	As a manager, I need to be able to view	Proposed	(1) On Track	86%	(1) On Track	(1) On Track	(1) On Track	(1) On Track	US\$252,400.00	US\$5,000,000.00	12/23/2022	03/13/2024	0%
Epic	Customer Feedback Interface	Proposed	(1) On Track	86%	(1) On Track	(1) On Track	(1) On Track	(1) On Track	US\$279,800.00	US\$120,000.00	04/13/2023	04/29/2024	0%
Project	EHR Implementation	Active	(3) Off Track	86%	(1) On Track	(1) On Track	(3) Off Track	(1) On Track	US\$253,840.00	US\$600,000.00	03/03/2023	12/05/2023	27%
Project	Social Networking Integration	Proposed	(1) On Track	100%	(1) On Track	(1) On Track	(1) On Track	(1) On Track	US\$203,070.00	US\$1,500,000.00	04/25/2023	12/20/2023	0%
Project	Team Collaboration	Proposed	(1) On Track	86%	(1) On Track	(1) On Track	(1) On Track	(1) On Track	US\$217,430.00	US\$350,000.00	04/25/2023	01/16/2024	0%
Project	Packaging Redesign to Reduce Plastic Us	Proposed	(1) On Track	43%	(1) On Track	(1) On Track	(1) On Track	(1) On Track	US\$356,436.00	US\$450,000.00	05/17/2023	06/28/2024	0%
Project	Timesheet Mobile App	Proposed	(1) On Track	100%	(1) On Track	(1) On Track	(1) On Track	(1) On Track	US\$23,566.00	US\$0.00	04/27/2023	07/24/2023	0%
Project	AI Template	Proposed	(1) On Track	100%	(1) On Track	(1) On Track	(1) On Track	(1) On Track	US\$77,527.00	US\$0.00	05/02/2023	04/17/2023	0%



Summary & Next Steps

Summary

- AI is rapidly being adopted, and will have significant impacts for PPM
- It is in its **early stages** and should be adopted and used with caution
- Open AI and Microsoft are **evolving in their offerings**
- AI has many applications in **Portfolio Management** and can greatly augment our human efforts
- OnePlan provides a comprehensive, **Adaptive PPM solution**
- **Integrates all work & resources** into common hub
- Teams continue to be Agile, and leadership gets visibility and metrics they require
- **Sophia GPT provides an AI Assistant** for advanced analysis, and automation/streamlining of tasks



Consistently Recognized as a Market Leader

 Microsoft - Global PPM Leader for 5 Consecutive Years



Gartner
2023 Peer Insights
“Voice of the Customer”
Strategic Portfolio Management

3Most SR 2022
Reputable
Companies of the Year

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



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- Register for new webinars
- Library of recorded, on-demand webinars

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



LIVE

April 25, 2024 |
10am PT & 1pm ET

Advancing Engineering with AI through the Next Generation of Strategic Project Portfolio Management with OnePlan

In the engineering sector, mastering the intricacies of project management demands innovative solutions. This webinar explores the integration of AI into project planning for engineering, tackling both immediate challenges in planning and execution while also setting the stage for unprecedented efficiency and quality. With a spotlight on practical applications, we'll explore strategies for harnessing AI [...]

LIVE

April 30, 2024 |
10am PT & 1pm ET

Resource Plan

Harness the Power of Effective Resource Planning with OnePlan's Resource Module

Join our Tech Tuesday Webinar to discover how you can transform your resource management strategy using OnePlan's Resource Plan Module. This webinar is tailored for project managers, resource & functional managers, and anyone involved in resource planning. In this session, you will learn: Overview of OnePlan's Resource Plan Module: Introduction to its key features and [...]

LIVE

May 2, 2024 |
10am PT & 1pm ET

Introducing Microsoft's new Enterprise Work Management (EWM) Solution

At the recent Microsoft Ignite 2023 conference, Microsoft unveiled a groundbreaking strategy that will redefine enterprise work management. The plan involves integrating Microsoft's key planning tools, Microsoft To Do, Microsoft Planner, and Microsoft Project for the web into a unified experience called "Microsoft Planner." What does this new strategy from Microsoft mean for current users? [...]

LIVE

May 9, 2024 |
10am PT & 1pm ET

How OnePlan Aligns with Microsoft's new Enterprise Work Management (EWM) Vision

Join us for this webinar as we explore how OnePlan integrates with Microsoft's latest Enterprise Work Management (EWM) vision. Microsoft has defined a compelling roadmap for the future, with Microsoft Planner playing a central role. The Planner Accelerator highlights the platform's PPM advancements, making it essential for existing Project Online users to grasp these changes. [...]

Categories

Adaptive Portfolio

Agile Portfolio

Collaborative Work Management

Financial Management

Professional Service Automation

Resource Plan

Strategic Portfolio Management

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.

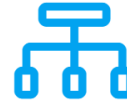


Strategic Portfolio Management

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

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

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Product Portfolio Management

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



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OnePlan

Thank You!!

The Power of One

MPUG

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