



The PMO of Tomorrow

Harnessing AI and Strategic Portfolio
Management to Drive Business Outcomes

MPUG



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Today's PMOs

... are facing challenges on multiple fronts in the modern, competitive, and fast-paced digital age



The Pace of Change
Continues to Accelerate

Strategic Portfolio Leaders Are
Forming Critical Partnerships With
“Digital Business Leaders”
to Achieve Desired Business Outcomes

Digital Business Leaders Face These Top Challenges to Success

**Orchestrating
enterprise change**



**Prioritizing and
executing on
cross-functional
investments**



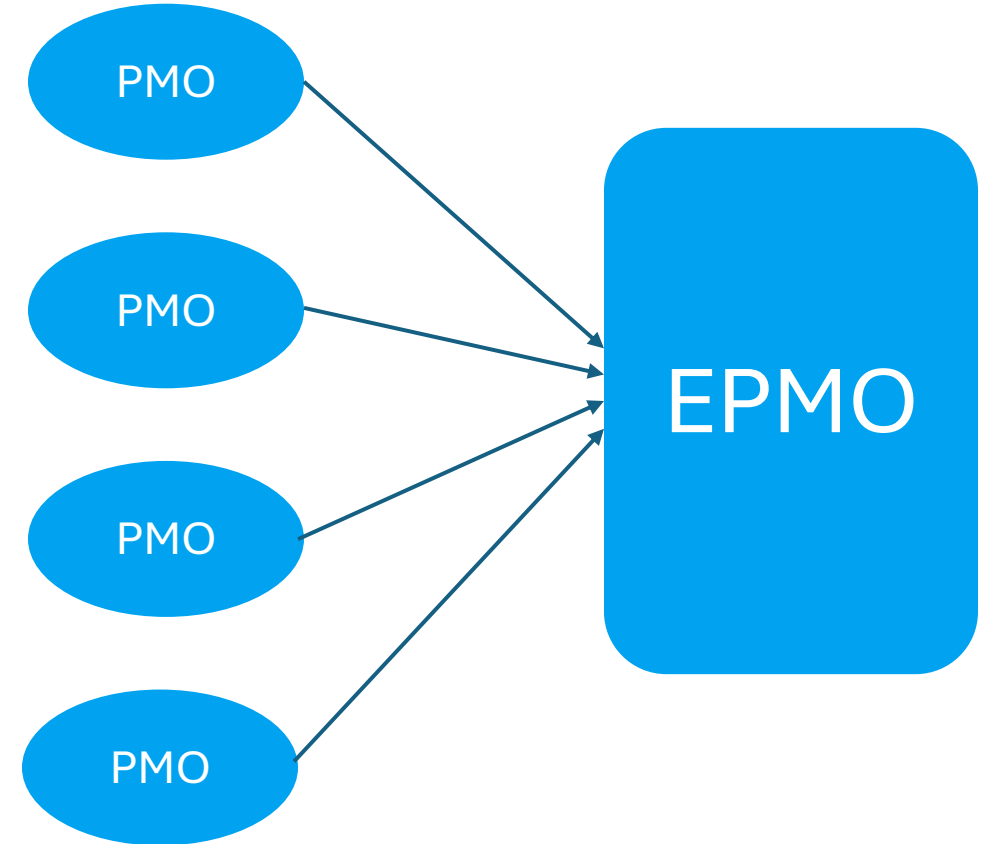
**Speed to deliver
value**



How Are These Leaders Responding
to These **Top Challenges**?

Move from Departmental PMOs to EPMO

49% of organizations have an EPMO function



WHY?

... Because Digital Business Leaders With an
EPMO Are **Gaining Competitive Advantage**

Digital Business Leaders Without an EPMO Say They Want One

68%

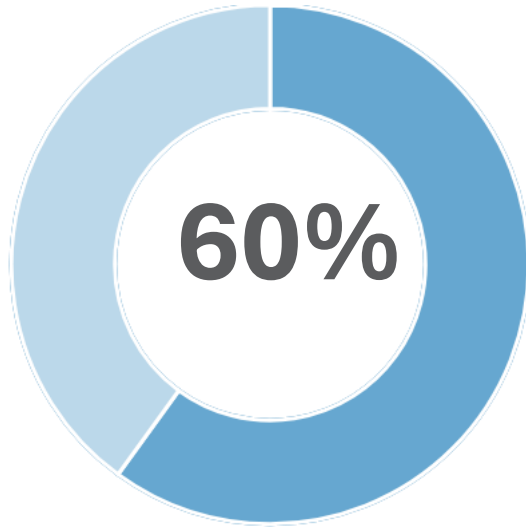
of the digital business leaders without an EPMO would be likely or very likely to champion its adoption

n = 82 organizations with EPMO not in use (Q05)

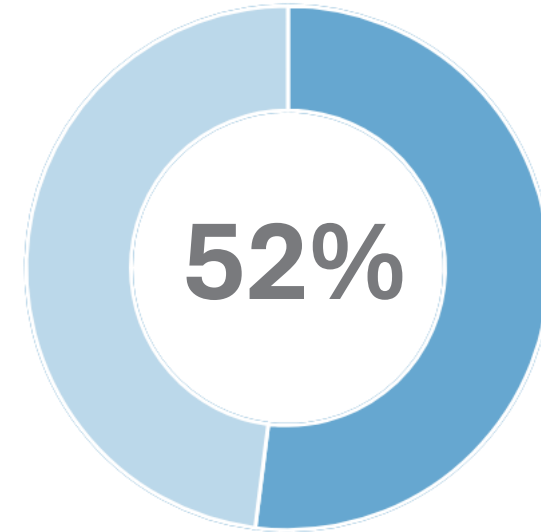
Question: If your organization could have the benefits of an EPMO, how likely would you be to champion the adoption of this program?

Source: Gartner's Digital Business Leaders Survey on EPMOs

Most-Prized Benefits for Respondents Without an EPMO



**Execution of large,
enterprise-wide initiatives**



**Quick and effective portfolio
prioritization**

n = 82 organizations with EPMO not in use (Q05)

Question: If it were available, which, if any, of the following would be valuable in meeting your organization's digital business challenges?

Source: Gartner's Digital Business Leaders Survey on EPMOs

Why the Shift?

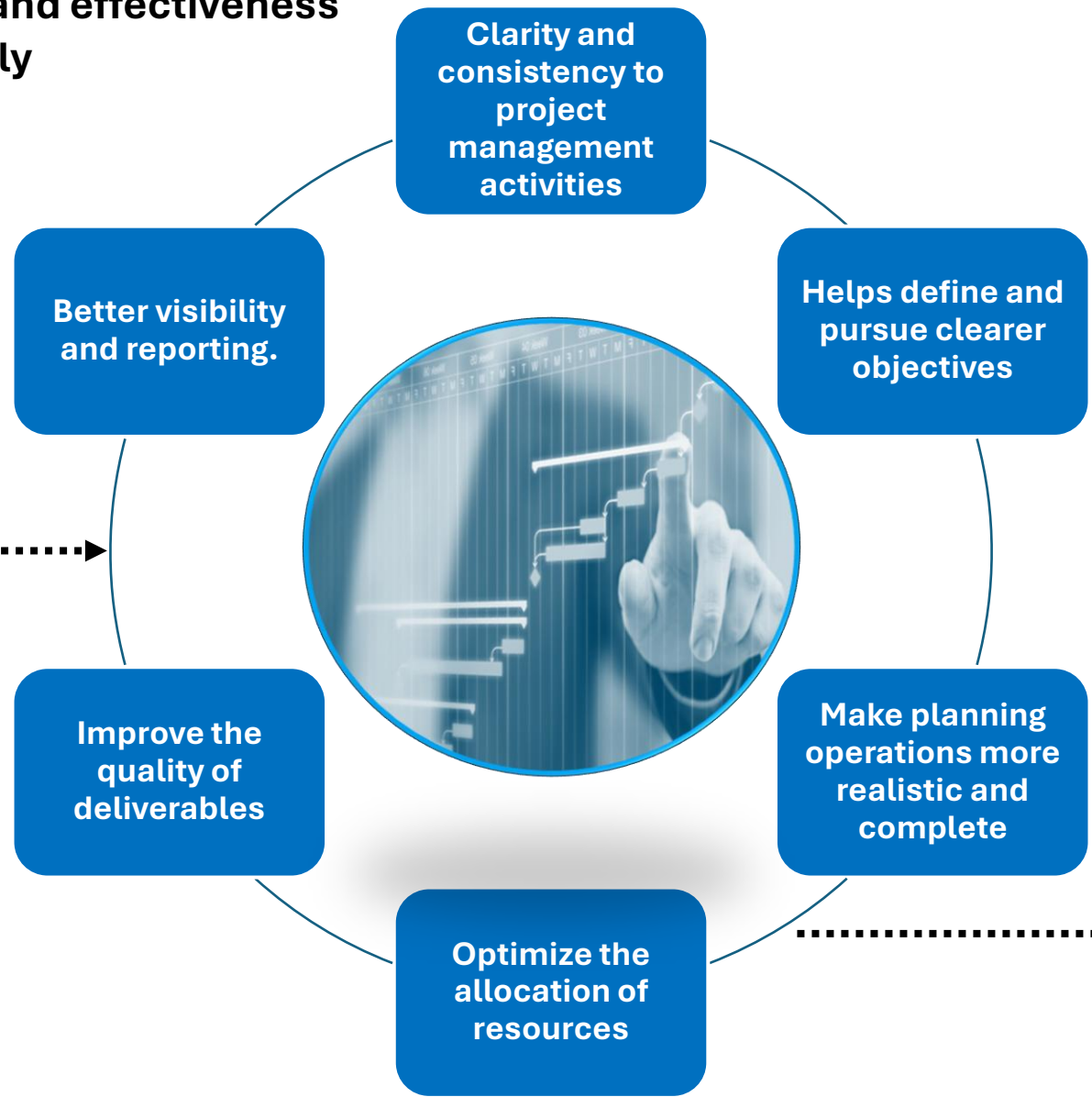
- 1 Because digital business leaders are increasingly generating a **continuous flux of threats and opportunities** with significant digital business implications.
- 2 Responding to these threats and opportunities often requires a **significant amount of effort and cost**.
- 3 It also requires **effective orchestration and governance at scale** — both of which are provided by an effective EPMO.
- 4 Core EPMO functions, such as the **execution of large, enterprise-wide initiatives and quick, effective portfolio prioritization**, as two of the most coveted capabilities for digital business success
- 5 With the right strategic relationships, a core focus on achieving key business objectives and outcomes, and positioning in the appropriate place in the enterprise, an **EPMO can significantly improve the enterprise's ability to execute a digital strategy and deliver value**.



Traditional Project Portfolio Management (PPM)

Advanced the capabilities and effectiveness of organizations significantly

Typical traditional PPM benefits include... ..



Many tools available that provide these capabilities, or just individual project and task management

Align Strategy With Execution

Executing strategy in the digital age requires tools connecting the **shared objectives of business strategists and those executing the change** and measuring true business value.



Process involving people, **strategy** and operations



System of:

- Strategy development and planning
- Organizational alignment
- Operational plans
- Monitoring, learning, testing and adapting afterward



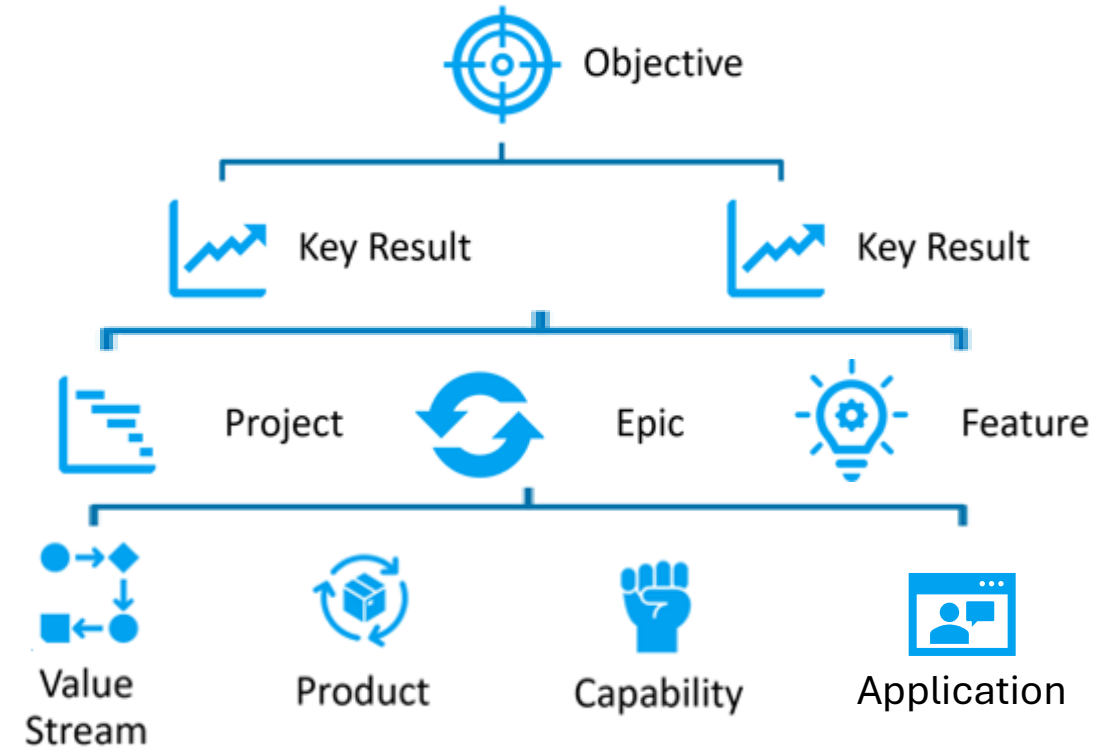
Forms the basis for an increase in value by “executing” the strategy



Strategic Portfolio Management (SPM)

A set of business capabilities, processes and supporting technologies that can focus an organization's finite resources to execute enterprise-wide business strategy.

- Leadership requires SPM to support **enterprise-wide strategy-to-execution alignment and adaptation**.
- Definition of key business strategies and desired business outcomes, and mapping key portfolio elements, such as **business capabilities, investments, programs, digital and physical products, applications, and projects**.
- Capture, define and prioritize **business strategies; manage the execution of initiatives and projects** that drive the achievement of these strategies; and provide full visibility and management of **core functional assets**.
- Supports three key stakeholders from **Leadership** who sets direction, **IT/Functional management** who owns the critical assets in infrastructure and **Execution teams** that plan and deliver projects and products in the pursuit of reaching the business goals.



Shift Toward SPM to Enable Organizational Agility

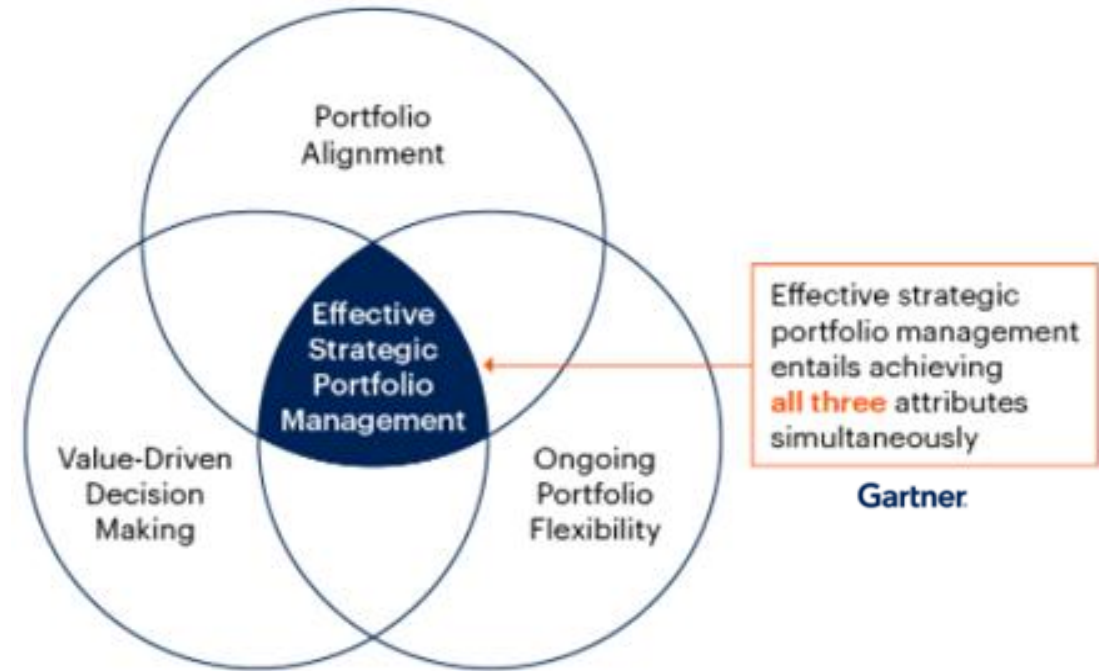
The increasing pace of change and environmental turbulence creates unsustainable strain for organizations. The need for agility will drive strategic portfolio leaders to increase adoption of strategic portfolio management, **evolve EPMO capabilities**, and change supporting tooling and metrics.

Key Findings

- ◆ Less than **20% of organizations are highly effective at all three key attributes**
- ◆ A fragmented approach to designing the future of work can lead to **excessive costs due to conflicting priorities, redundant processes and misaligned goals**.
- ◆ In a distributed delivery environment, business leaders overemphasize local customer needs while making decisions and **unintentionally pull the enterprise away from its strategic objectives**.

SPM has three key attributes:

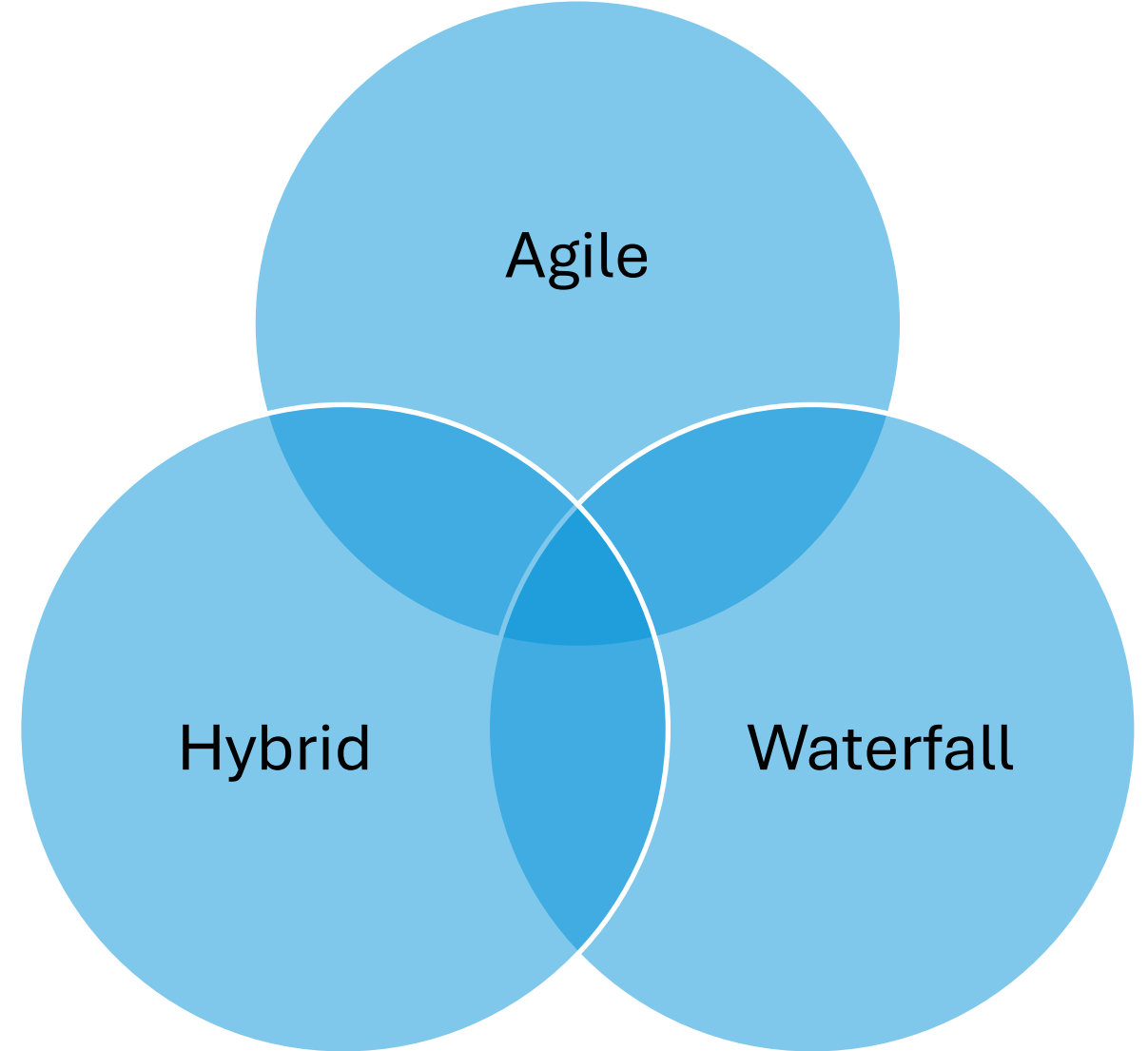
1. **Portfolio alignment**
2. **Value-driven decision making**
3. **Ongoing portfolio flexibility**














































































A recent Gartner study shows that organizations that are highly effective at all three attributes are approximately twice as likely to drive positive business outcomes.

Different Execution Methodologies

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

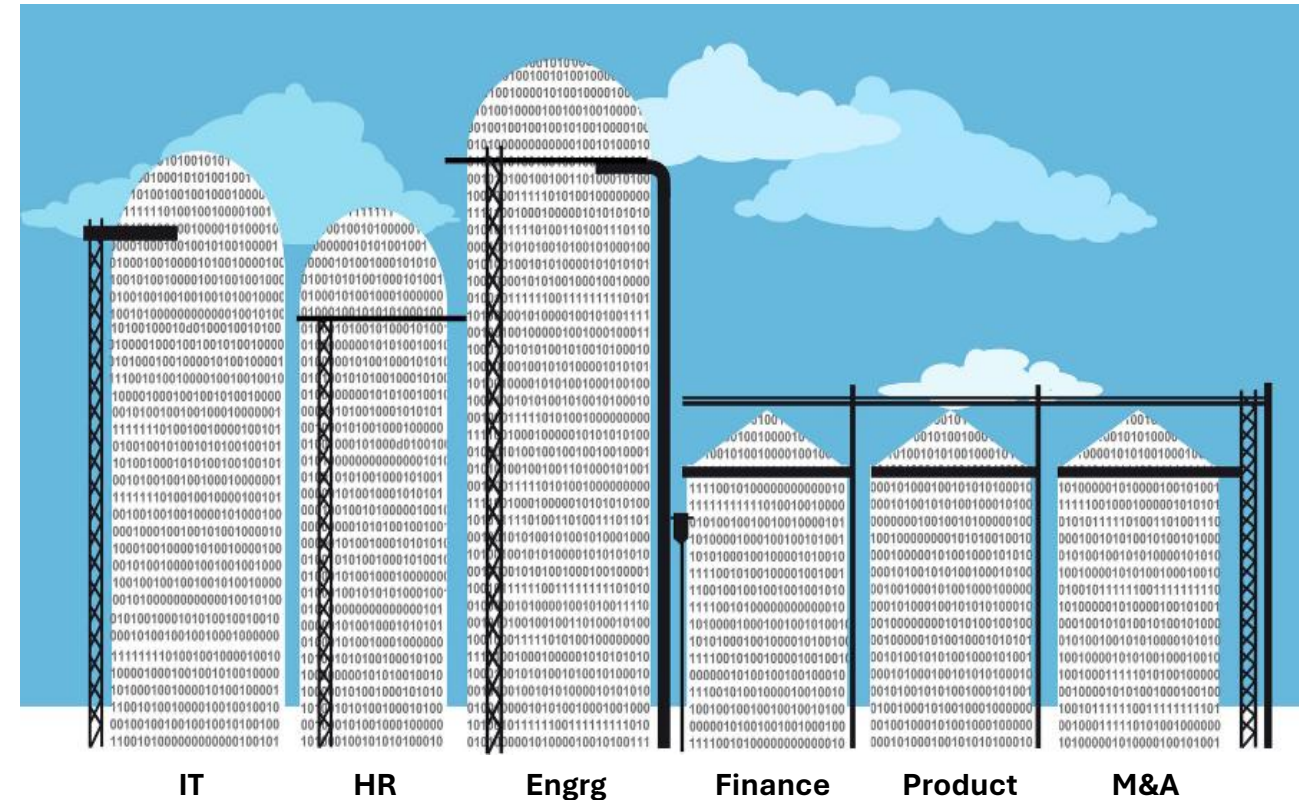


Proliferation of Tools Across the Organization

	PMO	Marketing	Finance	Application Development	Operational Excellence	NPD	Engineering
Demand Management	 Jira Software 				 	 	
Portfolio Management	 			 Jira Software		  Jira Software	  Jira Software
Project Management	   Jira Software Azure DevOps  	    	    	 Azure DevOps   Jira Software 	  	   Jira Software 	  Jira Software 
Time Management	 	 	 	  Airtable		 	
Reporting & Analysis	 	 	 	  Jira Software		   Jira Software	  + a b l e a u

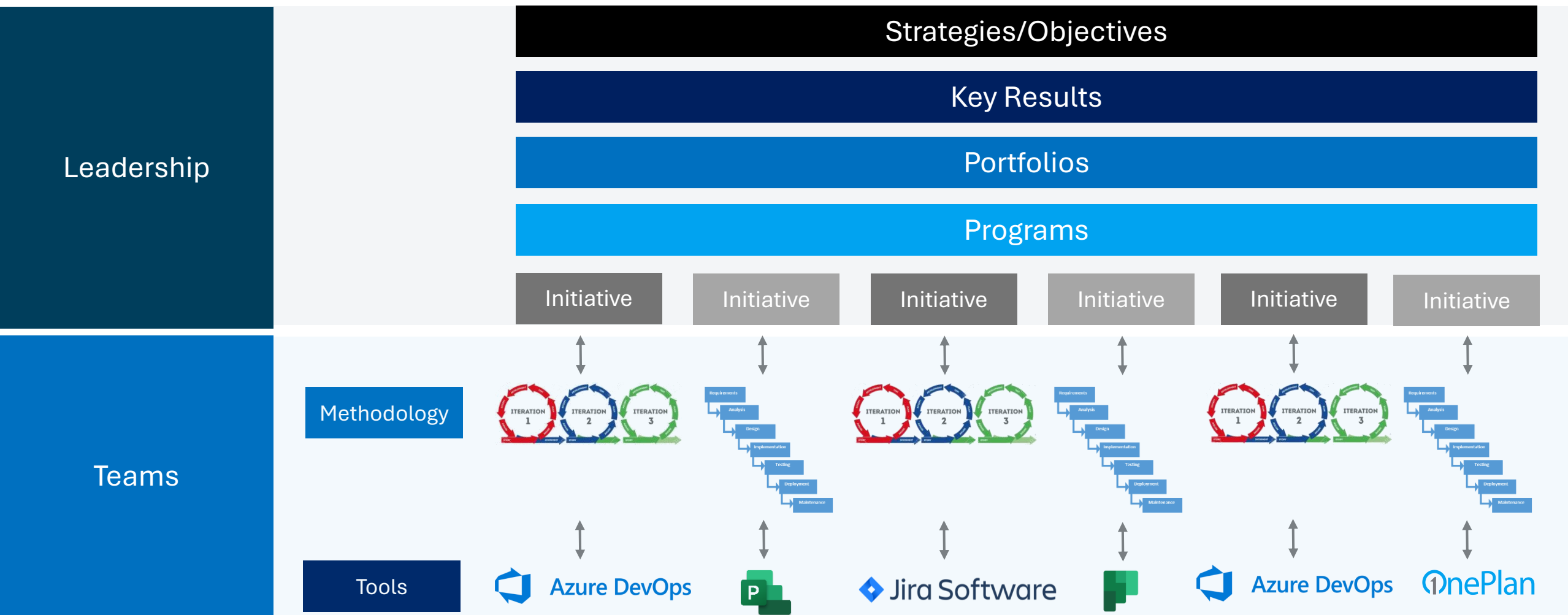
Organization & Information Silos Breed Increased Costs, Inefficiencies and Lack of Alignment

- Poor alignment and collaboration between participating functional areas
- Manual mash-ups of data from multiple tools and data sources
- Manual report creation, formatting and updating
- Duplication of efforts and data entry is time consuming, wasteful and prone to errors
- Disconnected information difficult to remain accurate and current across the board
- Chasing team members for timely/complete status and updates
- Comprehensive resource planning typically is its own separate data silo that is disconnected



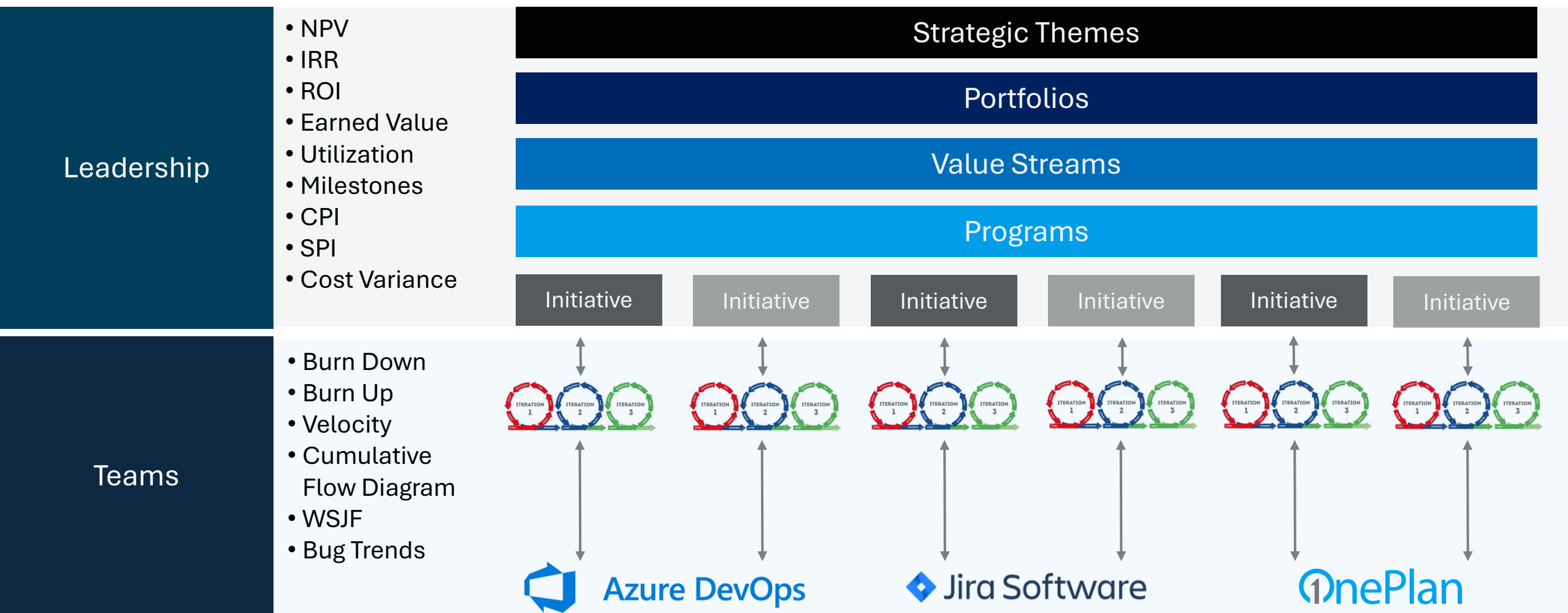
Teams Execute How They Need To

Leadership Gets Visibility It Needs



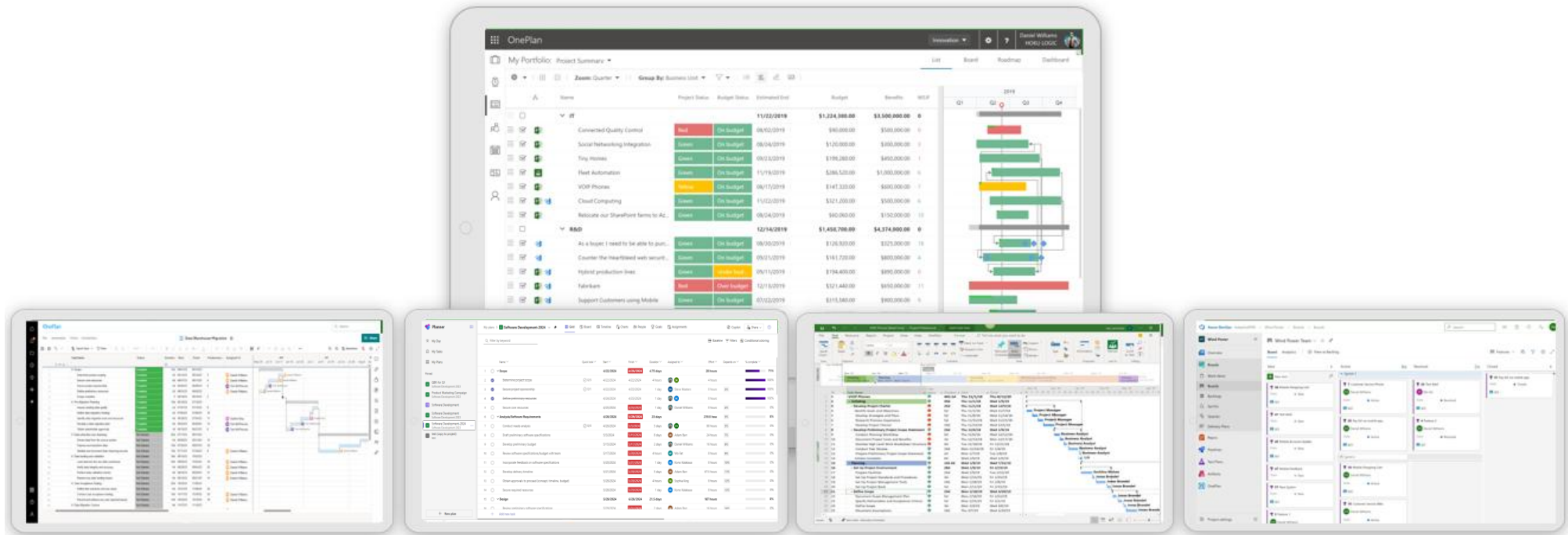
Consolidating and Translating

All Agile Teams



OnePlan

The Power to Choose



Smartsheet



Planner
(Basic & Premium)



Project Professional



Azure DevOps

Comprehensive portfolio management capabilities supporting multiple methodologies and tools



OnePlan is an AI-enabled Strategic Portfolio & Work Management platform that enable businesses to streamline their operations, optimize their investments & resources, while driving growth.

Connect Strategy to Execution

We bridge the gap between strategic goals and on-the-ground work, ensuring alignment across portfolios, programs, and projects.

Deliver Real-Time Visibility & Insights

Gain a unified view across all work with real-time dashboards and analytics that support faster, data-driven decision-making.

Unify Tools and Teams

Integrate with Microsoft Project, Planner, Azure DevOps, Jira, Smartsheet, and more—breaking down silos and improving collaboration.

Optimize Resource & Capacity Planning

Model capacity, demand, and resource allocation to ensure the right teams are focused on the right work at the right time.

Centralize Financial Management

Plan, track, and forecast budgets and actuals to improve investment performance and financial governance.

Support Hybrid Work Delivery Models

Enable Agile, Waterfall, and Hybrid work execution—all within a single platform that provides leadership with a consolidated view.

Plan Strategically. Execute Effectively. Deliver Value.

OnePlan Provides the Path to 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

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
PRODUCT PORTFOLIO MANAGEMENT**



EXECUTION LEADERS

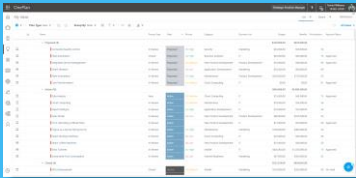
Solutions that support the selection, planning and execution of a variety of different Initiatives across the organization.

ADAPTIVE | PSA | AGILE | PRODUCT

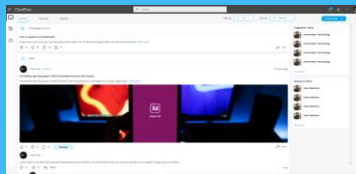
①OnePlan End-to-End Capabilities

Demand

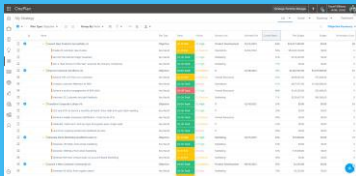
Stakeholders



Strategy



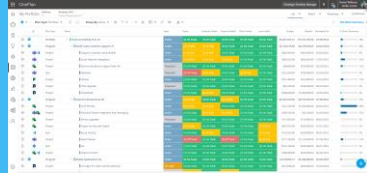
Ideation / Requests



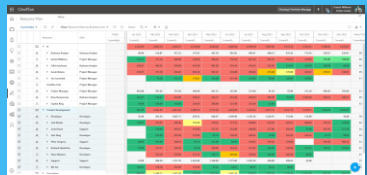
Products, Applications, etc.

Planning

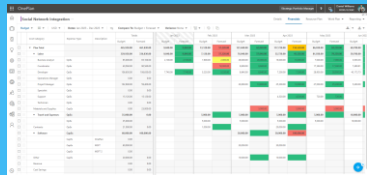
Portfolio Managers



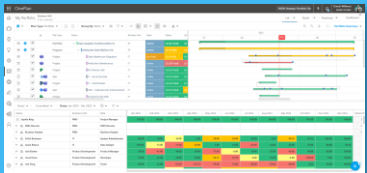
Portfolio Planning



Capacity Planning



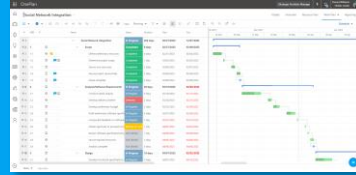
Financial Planning



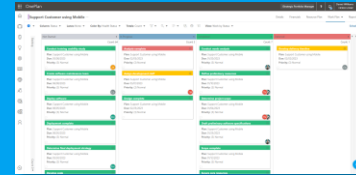
What-if Scenario Modeling

Execution

Plan Managers



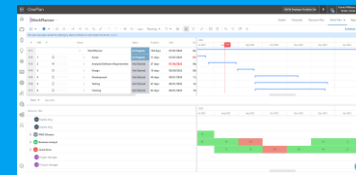
Work Plan



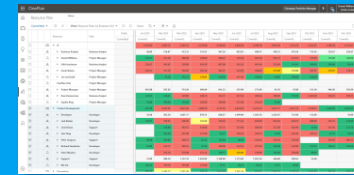
Agile Plan

Issues Risks Changes

Resource Managers

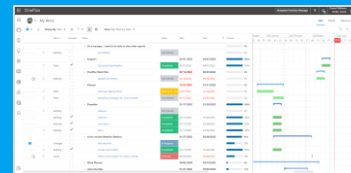


Resource Planning

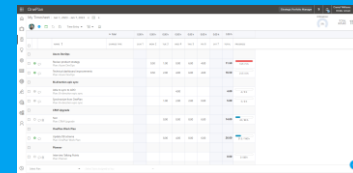


Resource Negotiation

Team Members



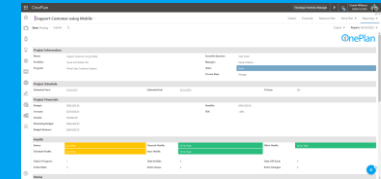
My Work



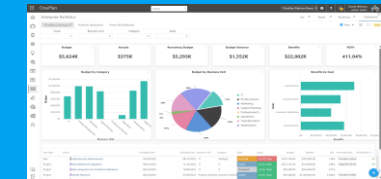
Timesheets

Analysis

Executives



Status Reports



Dashboards



Visualizations

- Products
- Services
- Applications
- Business Value
- Benefits
- Realization

Artificial Intelligence – Sofia GPT 

Do the right work

Do the work right

OnePlan Enterprise Platform

Governance

Demand

Planning

Execution

Analysis

Capabilities

Strategic Plan

Innovation Portal

Portfolio Plan

Portfolio Modeler

Financial Plan

Resource Plan

Work Plan

Time Tracking

Status Reports

Reporting

Solution Areas

Strategy

IT

R&D

Product

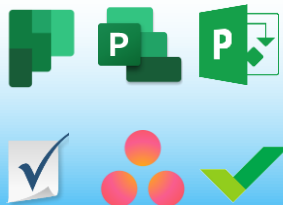
Operations

PMO

Build Your Own Solution

Integrations

Work Management



Application Development



Ideation



OneConnect/OneAnalytics

Service Management



Financial Management



Extensibility



Connect the Tools Your Teams Already Use

OnePlan helps unify your tech stack by integrating with the tools your teams already use. Whether it's Jira, Smartsheet, Salesforce, or custom systems, OnePlan creates a connected portfolio ecosystem.



Open Integration Hub

Connect with Jira, Smartsheet, ServiceNow, Salesforce, and more.



Automated Data Sync

Keep project data consistent across systems without manual effort.



Bi-Directional APIs

Enable real-time updates between OnePlan and external platforms.



Cross-System Intelligence

Use AI and insights across integrated toolsets for smarter decisions.



Extend the Power of Microsoft 365

OnePlan helps extend the power of Microsoft 365 for strategic portfolio management. It seamlessly connects with Teams, Project, Planner, Power BI, and more.



Native Microsoft Ecosystem Support

Connect with Teams, Power BI, Project, Planner, and Azure DevOps.



Two-Way Sync

Push and pull data between OnePlan and Microsoft tools seamlessly



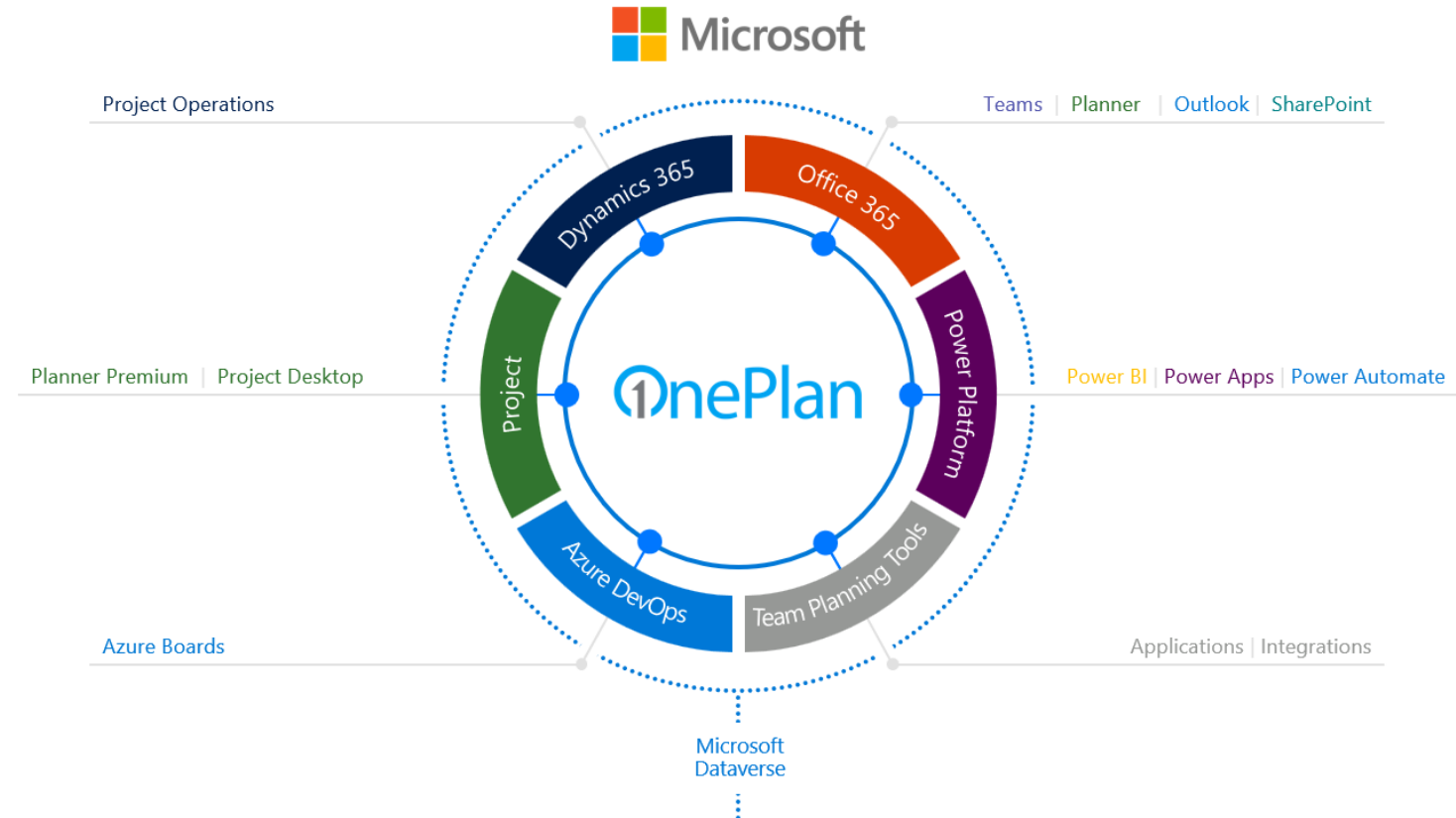
Use Microsoft Teams for Collaboration

Manage work, hold meetings, and update plans directly in Teams.



Enterprise-Grade Security

Compliant with Microsoft standards and certified for enterprise use.



AI-Driven Intelligence (Sofia GPT)

OnePlan helps you make faster, smarter decisions with built-in AI powered by Sofia. From plan generation to real-time recommendations, Sofia enhances productivity, improves decision-making, and reduces manual effort..



Generate Plans with Prompts

Use natural language to generate project, work, or financial plans instantly.



Summarize Updates & Status

Automatically summarize plan health, progress, and risks for executives and stakeholders.



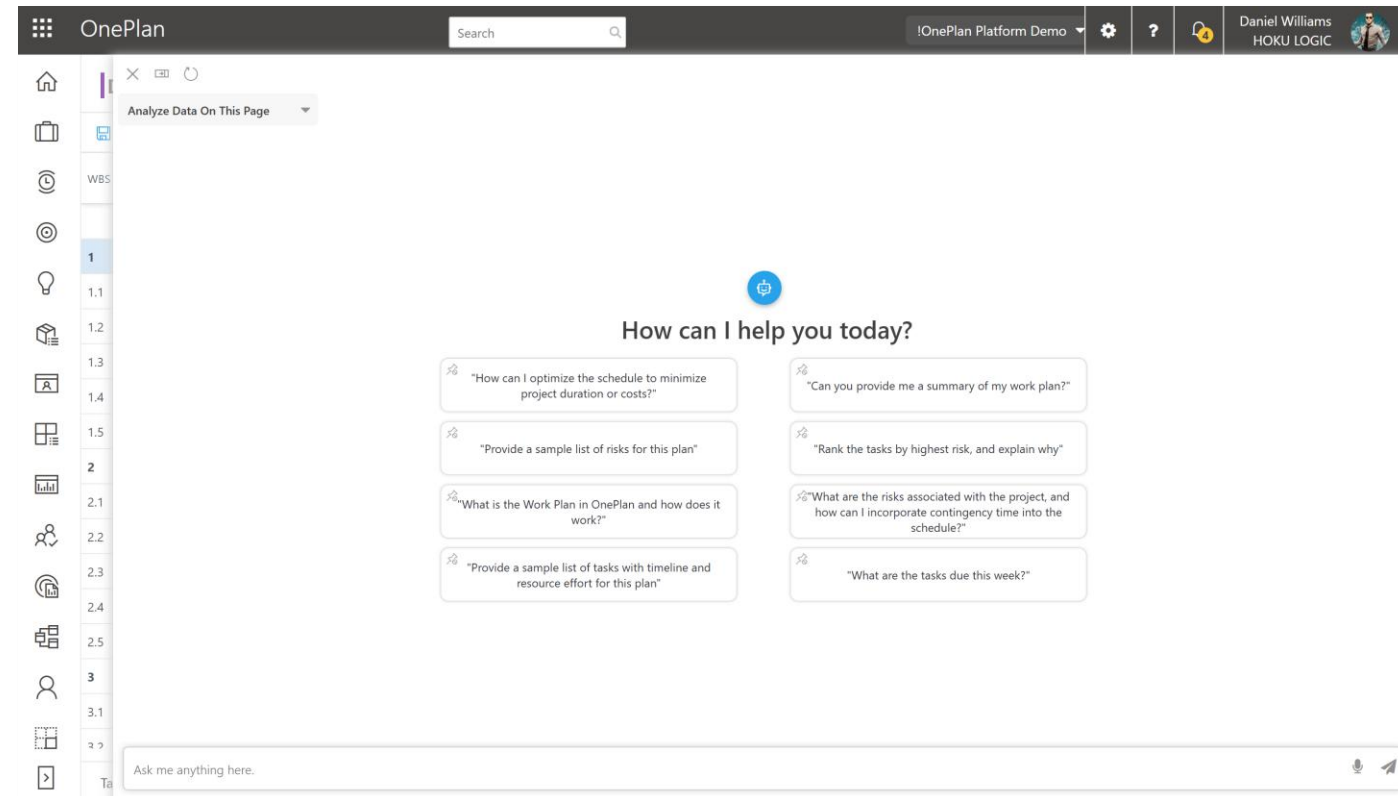
Identify Risks & Anomalies

Leverage AI to flag potential issues based on data trends and inconsistencies.



Context-Aware Assistance

Get in-app suggestions and automation tailored to your specific work context.



Sofia GPT Always Available in OnePlan

OnePlan

Strategic Portfolio Manager

?

Daniel Williams

HOKU LOGIC

My Portfolio

Business Unit

8 items selected

List

Board

Roadmap

Dashboard

Plan Type: Portfolio

Group By: None

Portfolio Summary

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.



Current Challenges

-  Strategic portfolio leaders must cut through GenAI hype
-  Must identify its business and functional implications fast
-  GenAI will impact your strategic portfolio management life cycle
-  Prepare now for four key inbound GenAI impacts to ensure effective strategic planning and execution



Impacts on Strategic Portfolio Leaders

1

The emergence of GenAI in the workplace and in the general public creates immediate knowledge and skills gaps

- For strategic portfolio leaders and their teams
- Left unaddressed, will negatively impact their ability to accelerate and optimize strategic planning and execution

2

Leveraging and investing in GenAI will flood portfolio demand pipelines with competing investment ideas

- Requiring strategic portfolio leaders to manage and prioritize the demand for new, unfamiliar types of investments and initiatives

3

Strategic portfolio leaders lack the partnerships they need to have to acquire the necessary data

- To get the most value from investments in GenAI designed to optimize strategic planning and execution

4

Strategic portfolio leaders, program managers, project managers and delivery teams will experience dramatic changes in their responsibilities

- Due to the proliferation of GenAI technologies



Incorporate GenAI Into Overall SPM Practices



Source: Gartner
802754_C

Portfolio management leaders do not need to take unnecessary risks with any GenAI investments but **doing nothing now is risky** and leads to missed opportunities.

Instead, create a **practical GenAI adoption plan** featuring three main steps to GenAI business value.

Key Findings

- ✓ Portfolio management leaders are pragmatic and practical by nature, and do not chase new trends or business fads. Unsurprisingly, many are applying an understandably analytical and sense-and-respond approach to generative AI (GenAI) hype, choosing to wait for GenAI to go mainstream and responding when that occurs.
- ✓ Whether portfolio management leaders have a plan for GenAI adoption or not, it will go mainstream in the workplace, which can have both positive and negative impacts on the strategic portfolio management (SPM) life cycle — especially if proper preparation isn't already in place.
- ✓ Enterprise-wide GenAI access will create challenges and opportunities for portfolio management leaders. Targeted and incremental GenAI training, pilots and adoption efforts designed to optimize strategic planning, and execution can help navigate the challenges and capitalize on improved overall portfolio execution.



Common Project Manager Tasks

Illustrative Time Savings per Project

PM task (per project)	Human task	Weekly time	AI assistance	Weekly Time with AI assistance	Time savings
Schedule creation and management	Creating and maintaining a project schedule	3 hours	Generates and alters schedule based on inputs	30 minutes	2 hours and 30 minutes
Status reporting	Creating status reports and summaries	1 hour	Generates status report based on information	15 minutes	45 minutes
Meetingmanagement	Scheduling and summarizing meetings	1 hour	Schedules and summarizes meetings	15 minutes	45 minutes
Productivity evaluation	Determining team productivity and possible areas of efficiency gains	2 hours	Identifies and recommends actions for bottlenecks	30 minutes	1 hour 30 minutes
Resource allocation	Assigning and updating project resources to tasks	2 hours	Recommends assignments based on skills and prior work	30 minutes	1 hour 30 minutes
Budget management	Reviewing spend and recommending actions to stay on budget	30 minutes	Generates recommendations to stay on track	15 minutes	15 minutes
Risk management	Identifying and managing risks	2 hours	Identifies recommendations for risk management	30 minutes	1 hour 30 minutes
Total	N/A	11 hours 30 minutes	N/A	2 hours 45 minutes	8 hours 45 minutes

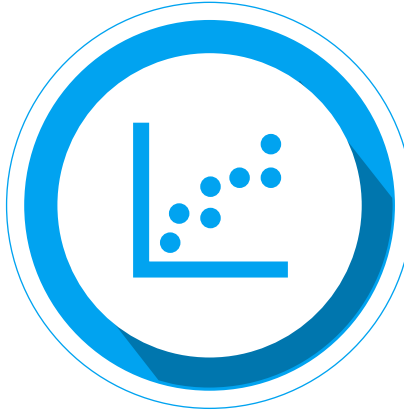
Source: Gartner (July 2024)

Sample Use Cases for AI in Portfolio Management



Strategic Planning

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



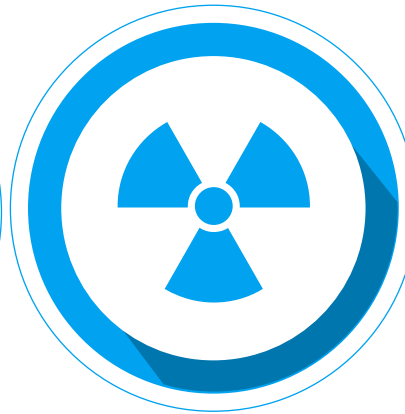
Portfolio Optimization

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



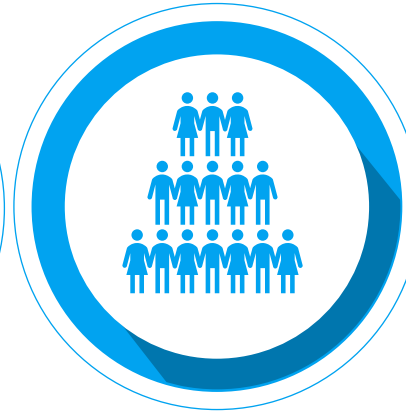
Work Management

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.

Use Cases for AI in Strategic 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
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
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

Use Cases for AI in Strategic 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

Demonstration

Sofia GPT

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.

Provide a list of viable OKRs for an Enterprise PMO

OnePlan

Search

!Strategic Portfolio Manager

?

My Strategy

Business Unit

List

Board

Roadmap

Dashboard

Plan Type: Objective

Filter

Columns

Group By: None

Row Height

!Objective Summary

Plan Type	Name	Business Unit	Status	Priority	Estimated End	Current Metric	Plan Budget	Prioritization S...
No records to display								

Provide a list of viable Key Results for this Objective

OnePlan

!Agile Portfolio Management

?

3

Daniel Williams
HOKU LOGIC

Generate More Marketing Qualified...

DetailsReporting

ProposedActiveClosed

Objective Information

Name:Generate More Marketing Qualified Leads

Business Unit:Marketing

Lead:

Priority:(1) High

State:Active

Goals:Transformation

Status:(2) At Risk

Current Metric:43%

Objective Description

The Generate More Marketing Qualified Leads objective is an important and high-priority initiative currently active and underway within the Marketing business unit. The primary goal of this project is to drive transformation by increasing the number of marketing qualified leads (MQLs) generated through various marketing efforts and strategies. This ultimately aims to improve the organization's overall sales pipeline and conversion rates, leading to higher revenue and business growth.

Objective Schedule

Estimated Start:01/01/2023

Estimated End:12/31/2023

Objective Financials

Budget:\$3,500,000.00

Benefits:\$6,000,000.00

ROI:71%

Objective Prioritization

MPUG

OnePlan

Analyze data to identify patterns, opportunities, and potential risks

OnePlan

!Strategic Portfolio Manager

?

Daniel Williams
HOKU LOGIC

My Strategy

ListBoardRoadmapDashboard

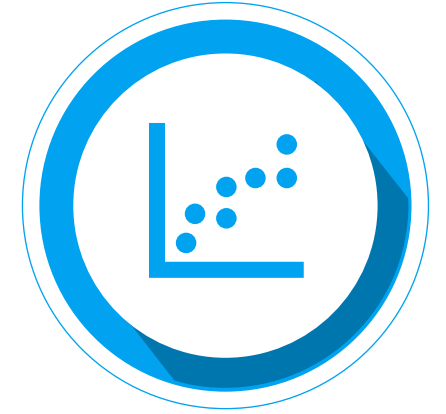
+ | Plan Type: Objective | + | Group By: None |

!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 Development	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 Resources		\$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 Resources		\$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 meetings	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 Resources		\$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

DEMO Strategic Portfolio M

Settings

Help

Notifications

Daniel Williams
HOKU LOGIC

My Ideas

+ Plan Type: Idea

Group By: None

Filter

Sort

Share

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 Devi	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 Devi	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 Increase 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

Any Data Anomalies in the Portfolio?

OnePlan

!DEMO Strategic Portfolio M

Daniel Williams

HOKU LOGIC

My Portfolio

ListBoardRoadmapDashboard

Plan Type: 2 TypesGroup By: NoneProject 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 devices	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	\$1
	Project	Microsoft Teams Integration and messaging	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 reporting	Active	(2) At Risk	86%	(1) On Track	(1) On Track	(1) On Track	(2) At Risk	\$201,007.50	\$1
	Epic	As a manager, I need to be able to view sales	Proposed	(1) On Track	86%	(1) On Track	(1) On Track	(1) On Track	(1) On Track	\$252,400.00	\$5
	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	\$1

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

DEMO 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:

Creating and Detailing a New Project

OnePlan

Search

!DEMO PMBOK Portfolio Ma

?

Daniel Williams
HOKU LOGIC

My Portfolio

Business Unit

State

List

Board

Roadmap

Dashboard

Plan Type: Portfolio

Filter

Columns

Group By: None

Row Height

Portfolio Summary

	Plan Type	Name	Business Unit	State	Status	Schedule Health	Financial Health	Effort Health	Issue Health	Budget
Portfolio	Portfolio	Data Analytics Transformation (1)	IT	Active	(2) At Risk	(1) On Track	(1) On Track	(1) On Track	(1) On Track	\$4,064,155.0
Program	Program	Enterprise Data Platform (12)	IT	Active	(3) Off Track	(3) Off Track	(1) On Track	(1) On Track	(1) On Track	\$4,064,155.0
Project	Project	Data Warehouse Migration*	IT	Active	(3) Off Track	(3) Off Track	(2) At Risk	(1) On Track	(1) On Track	\$327,232.5
Project	Project	Predictive Maintenance	IT	Active	(3) Off Track	(3) Off Track	(2) At Risk	(1) On Track	(1) On Track	\$90,280.0
Epic	Epic	Cybersecurity Enhancement	IT	On Hold	(3) Off Track	(1) On Track	(1) On Track	(1) On Track	(1) On Track	\$763,350.0
Project	Project	VOIP Phones	IT	Active	(1) On Track	(1) On Track	(1) On Track	(1) On Track	(1) On Track	\$793,820.0
Project	Project	Microsoft Teams Integration and me	IT	Active	(1) On Track	(1) On Track	(1) On Track	(1) On Track	(1) On Track	\$370,720.0
Project	Project	Server Upgrades	IT	Active	(1) On Track	(1) On Track	(1) On Track	(1) On Track	(1) On Track	\$436,460.0
Project	Project	Improve User Experience	IT	Active	(1) On Track	(1) On Track	(1) On Track	(1) On Track	(1) On Track	\$464,309.1
Project	Project	iOS Apps for Metro Transit Authority	IT	Active	(2) At Risk	(2) At Risk	(1) On Track	(2) At Risk	(1) On Track	\$327,646.6
Epic	Epic	Delivering Agile Solutions	IT	Active	(1) On Track	(1) On Track	(1) On Track	(1) On Track	(1) On Track	\$101,116.6
Epic	Epic	New Customer Support Portal	IT	Active	(1) On Track	(1) On Track	(1) On Track	(1) On Track	(1) On Track	\$177,820.0
Engagement	Engagement	Blue Yonder Airlines Implementation	IT	Proposed	(1) On Track	(1) On Track	(1) On Track	(1) On Track	(1) On Track	\$0.0
Project	Project	Cloud Infrastructure Optimization Pr	IT	Active	(1) On Track	(1) On Track	(1) On Track	(1) On Track	(1) On Track	\$211,400.0
Portfolio	Portfolio	Product Innovation Portfolio (1)	Product Development	Active	(1) On Track	(1) On Track	(1) On Track	(1) On Track	(1) On Track	\$2,002,785.0
Program	Program	Digital Marketing Program (4)	Product Development	Active	(1) On Track	(1) On Track	(1) On Track	(1) On Track	(1) On Track	\$2,002,785.0
Project	Project	Market Research	Product Development	Active	(1) On Track	(1) On Track	(1) On Track	(1) On Track	(1) On Track	\$2,002,785.0

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

?

Smart Home Automation System

DetailsFinancialsResource PlanWork PlanReporting

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 Technologies	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



Rank Resources by Highest Risk

OnePlan

!DEMO Strategic Portfolio M

Daniel Williams
HOKU LOGIC

My Portfolio

ListBoardRoadmapDashboard

Plan Type: Portfolio

Group By: None

Project Data

	Plan Type	Name	State	Status	Compliance	Schedule Health	Financial Health	Effort Health	Issue Health	Budget	
	Portfolio	Cloud and Mobile First (3)	Active	(1) On Track	100%	(1) On Track	(1) On Track	(1) On Track	(1) On Track	\$4,033,885.83	\$5
	Program	World-Class Customer Support (5)	Active	(1) On Track	100%	(1) On Track	(1) On Track	(1) On Track	(1) On Track	\$2,151,786.00	\$2,
	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	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	Active	(2) At Risk	100%	(2) At Risk	(1) On Track	(1) On Track	(1) On Track	\$279,400.00	\$
	Program	Improve Infrastructure (4)	Active	(2) At Risk	100%	(1) On Track	(2) At Risk	(1) On Track	(1) On Track	\$1,160,247.50	\$1,
	Project	VOIP Phones	Active	(1) On Track	100%	(1) On Track	(1) On Track	(1) On Track	(1) On Track	\$271,750.00	\$1
	Project	Microsoft Teams Integration and mes	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	\$
	Program	Mobile Applications (3)	Active	(1) On Track	100%	(1) On Track	(1) On Track	(1) On Track	(1) On Track	\$721,852.33	\$
	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	\$
	Portfolio	Appeal to a younger demographic (2)	Active	(3) Off Track	100%	(1) On Track	(3) Off Track	(1) On Track	(1) On Track	\$1,407,54	\$8

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

OnePlan | JKP - SPM 5Feb25

Shipping & Delivery

DetailsFinancialsResource PlanWork PlanReporting

Committed

View: Resource Summary

Hours

Resource		Business Unit	Role	Totals	Jan 2025	Feb 2025	Mar 2025	Apr 2025	May 2025	Jun 2025	Jul 2025	Aug 2025	Sep 2025	Oct 2025	Nov 2025
				Committed	Committ...	Committ...	Committ...	Committ...	Committ...	Committ...	Committ...	Committ...	Committ...	Committ...	Committ...
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Plan Total	0.00											

What resources do I need to hire?

OnePlan							!Strategic Portfolio Manager							Daniel Williams HOKU LOGIC	
Resource Plan							Committed							View: Resource Summary	
				Resource	Business Unit	Role	Totals		Jan 2023	Feb 2023	Mar 2023	Apr 2023	May 2023	Jun 2023	Jul 2023
							Committe		Committ...	Committ...	Committ...	Committ...	Committ...	Committ...	Committ...
<input type="checkbox"/>				Adam Barr	Marketing	Specialist			32.00	161.21	283.88	224.24	275.88	156.12	31
<input type="checkbox"/>				Anthony Harris	Finance	Coordinator			172.00	82.67	132.00	132.00	265.33	30.00	3
<input type="checkbox"/>				Brian Anderson	Finance	Business Analyst			388.00	152.00	196.00	294.00	144.00	76.00	3
<input type="checkbox"/>				Business Analyst	IT	Business Analyst			48.80	156.87	473.33	347.67	467.50	893.83	48
<input type="checkbox"/>				Chris Evans	Marketing	Coordinator			88.00	176.00	556.00	142.00	230.00		4
<input type="checkbox"/>				Clark Smith	Operations	Specialist			61.60	221.33	457.73	76.33	214.73	68.27	15
<input type="checkbox"/>				Coordinator	Finance	Coordinator									
<input type="checkbox"/>				Daniel Williams	IT	Project Manager			152.67	211.56	388.00	328.00	588.67	776.56	66
<input type="checkbox"/>				Developer	Product Development	Developer			34.40	202.50	1,007.17	879.33	668.67	1,499.90	1,50
<input type="checkbox"/>				Erlich bachman	IT	Business Analyst			238.67	462.67	329.00	654.50	897.00	516.56	46
<input type="checkbox"/>				Gavin Belson	IT	Project Manager			292.27	317.39	450.02	505.36	503.47	344.00	25
<input type="checkbox"/>				George Robinson	Human Resources	Coordinator			98.67	72.00	621.33	234.67	204.67	152.67	13
<input type="checkbox"/>				Jack Barker	Product Development	Developer			170.67	550.93	308.40	163.60	730.26	771.43	83
<input type="checkbox"/>				Jack Summer	Human Resources	Business Analyst				175.20	392.40	256.40	192.00	96.00	
<input type="checkbox"/>				James Garcia	Finance	Business Analyst			364.29	325.71	474.00	288.00	80.00	8.00	
<input type="checkbox"/>				Jared Dunn	Product Development	Support				128.00	492.67	414.00	373.33	352.00	56
<input type="checkbox"/>				Jian Yang	Product Development	Developer				104.00	297.00	217.00	93.33	358.43	72
<input type="checkbox"/>				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

DetailsFinancialsResource PlanWork PlanReporting

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		
		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 Group By: None 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	\$1
	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	\$1
	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	\$5
	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	\$1

Augmented Data Entry – Project Manager Status Report Narrative

OnePlan

DEMO Strategic Portfolio M

Daniel Williams
HOKU LOGIC

My Portfolio

ListBoardRoadmapDashboard

Plan Type: 2 TypesGroup By: None

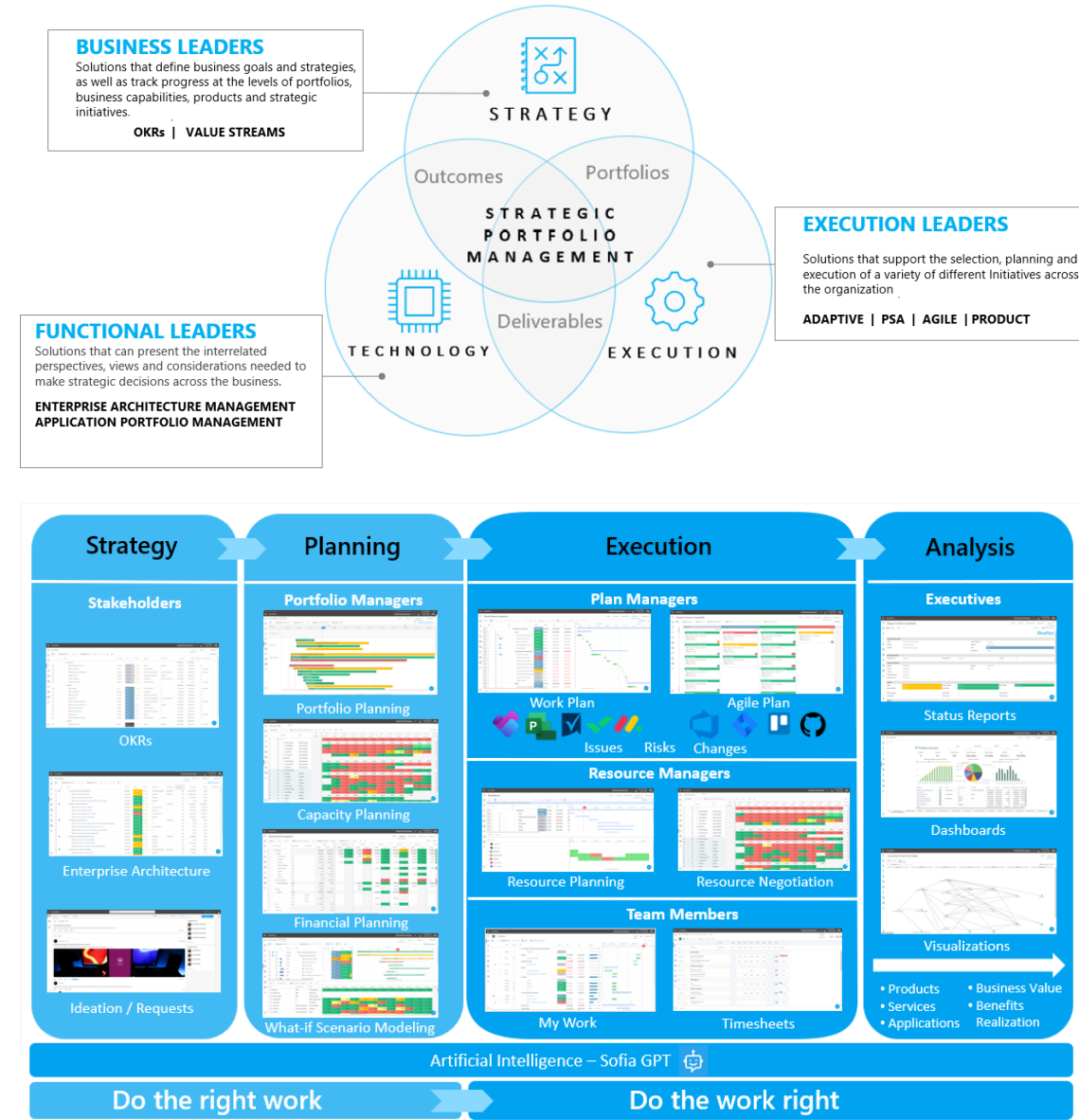
Project Data

	Plan Type	Name	State	Status	Compliance	Schedule Health	Financial Health	Effort Health	Issue Health	Budget	Benefits	Modified	Estimated End	% Done (Summary)	# of
	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

- **Strategic Portfolio Management (SPM)** has become important in today's business environment
- **Increased complexity**, and the fast pace of change requires enhanced methods and approaches
- Evolution from departmental **PMOs to EPMOs** to address the needs of modern organizations
- **AI** has many applications in **Portfolio Management** and can greatly augment our human efforts
- **OnePlan** provides end-to-end Strategic Portfolio Management in the Microsoft Cloud
- From a **bottom-up standpoint**, **OnePlan** connects to existing **Work Management tools** to provide the overarching governance for an EPMO
- The **use of AI** provides valuable assistance and insights to our SPM efforts, and **Sofia GPT** provides **AI-enabled capabilities** in OnePlan



OnePlan at a Glance

Strategic Partnership



Private Equity Partner



Industry Recognitions



Secured Platform



Customer Testimonials



"OnePlan helped us go from 20% to 92% adoption by enabling standardization, transparency, and governance."

[Watch the Testimonial](#)



"OnePlan has been a game changer for visibility and alignment across the organization."

[Watch the Testimonial](#)



"OnePlan gives us the tools to track, plan, and report on major initiatives — helping our teams stay focused and aligned on what matters most."

[Watch the Testimonial](#)



"OnePlan brought everything into one place, streamlined our reporting, and really took our PMO to the next level."

[Watch the Testimonial](#)



"OnePlan brought us global visibility and helped us manage strategic projects in a way we never could before."

[Watch the Testimonial](#)



"OnePlan gives us one source of truth to manage multiple portfolios, drive innovation, and make better business decisions."

[Watch the Testimonial](#)



"OnePlan has brought transparency, adaptability, and real strategic alignment to our project portfolio—it's truly invaluable."

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"OnePlan became our single source of truth — it helped us standardize processes, scale efficiently, and deliver real-time data to our leadership."

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Live

Microsoft Platform Integrations

PMO

Breaking Down Silos Across Project Management Tools with OnePlan



Disconnected project management tools don't just cause headaches—they make it nearly impossible to see what teams are working on, manage resources effectively, or deliver projects on time. As organizations grow,...

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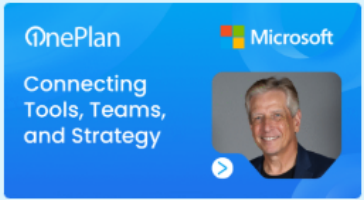
📅 08/14/2025 ⌚ 10am PT | 1pm ET

Live

Microsoft Platform Integrations

PMO

The Microsoft PMO of Tomorrow: Connecting Tools, Teams, and Strategy with OnePlan



Today's PMOs face growing complexity across tools, teams, and processes, especially in Microsoft-heavy environments. Too often, disconnected systems and siloed work make it hard to see the big picture, align...

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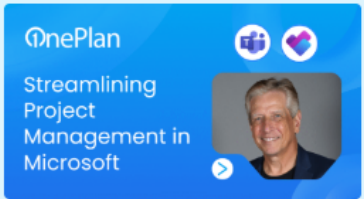
📅 08/21/2025 ⌚ 10am PT | 1pm ET

Live

Strategic Portfolio Management

PMO

Streamlining Project Management in Microsoft Project, Planner, and Teams with AI and OnePlan



Managing projects across Microsoft tools like Project, Planner, and Teams often leads to duplicated effort, unclear ownership, and scattered updates. Without a single view, it's easy to lose track of...

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📅 08/28/2025 ⌚ 10am PT | 1pm ET

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Complimentary assistance available from OnePlan



Strategic Portfolio Management

Balance, align and optimize your portfolio of projects, programs and assets with your organization's strategic objectives, capabilities and risk tolerance. Identify, prioritize, allocate and monitor resources, investments and initiatives to deliver value, innovation and competitive advantage.

Learn more →



Adaptive Project Portfolio Management

Adaptive Project Portfolio Management is a combination of traditional project management approaches and Agile methodologies, tailored to fit the specific needs and constraints of an organization's projects. Adaptive PPM seeks to balance the benefits of both methodologies, such as predictability and structure from traditional PM and adaptability and speed from Agile, in order to achieve project success in a complex and rapidly changing environment.

Learn more →



Agile Portfolio Management

Agile Portfolio Management is a flexible, iterative approach to managing an organization's portfolio of projects, programs, and initiatives that aligns with Agile principles and values. It involves continuously prioritizing, funding, and directing work based on changing business priorities and stakeholder feedback, rather than a pre-determined plan.

Learn more →



Professional Service Automation

Automate and integrate various business processes for professional service organizations, such as consulting firms, law practices, and accounting firms. Streamline workflows, enhance productivity, and provide real-time visibility into project performance, resource utilization, and customer engagement.

Learn more →



Product Portfolio Management

Balance, align and optimize your portfolio of products and services with your business strategy, capabilities and market opportunities. Ensure your products meet customer needs, achieve desired revenue and profitability goals, and drive innovation and growth.

Learn more →



PMBOK

The Project Management Institute's PMBOK Guide 7th Edition represents a significant shift in project management thinking, moving from a process-based to a principles-based approach. As organizations adapt to this new paradigm, OnePlan's comprehensive portfolio, program & project management platform offers robust support for implementing the guide's key concepts.

Learn more →



Strategic Execution Management

Close the strategy-execution gap, providing a transparent line of sight to ensure all initiatives are aligned with strategy. By connecting long-term business strategy, OKRs and results, your enterprise can more effectively measure progress to goals, adapt to market changes, and optimize value, so you can confidently translate strategy into action.

Learn more →



Collaborative Work Management

Help teams efficiently plan, organize, and complete tasks together. Improve team communication, productivity and overall results by enabling seamless collaboration, task delegation and progress tracking.

Learn more →



Project Portfolio Management (PPM) for Life Sciences

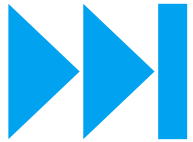
Helps Life Sciences leaders define their objectives and key results (OKRs) across programs, teams and departments, create visual roadmaps, and measure progress. Advanced yet simplified strategic planning tools protect investments through more effective better planning and execution, while optimizing resources and eliminating unnecessary spend.

Learn more →



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Next Steps



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OnePlan
&

MPUG

thank you!

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Jim Patterson

jpatterson@oneplan.ai