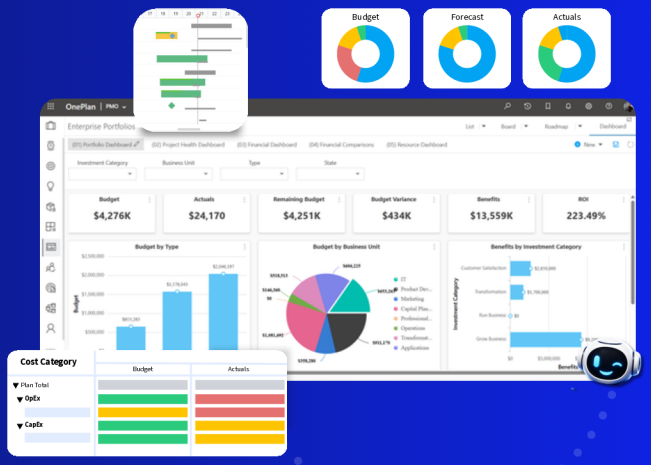
OnePlan

FEATURE OVERVIEW

Financial Planning Software

Turn strategy into delivery with connected portfolio planning.



Plan with confidence. Track every dollar. Maximize every investment.

Connect strategy, budgets, forecasts, and actuals in one place. Give leaders complete visibility into project investments so they can make smarter funding decisions and deliver greater business value.

OnePlan empowers you to anticipate how the money you spend will translate into real company value by connecting cost to delivery.

> *"With OnePlan, we finally have a single view of costs and capacity across all divisions. It has transformed the way we prioritize projects globally."*
>
> - Vantiva

Financial Planning Key Benefits

Connect strategy to spending.

Link investments directly to strategic initiatives, projects, and portfolios so every dollar truly supports business priorities.

Stay ahead of budget risks.

Monitor budgets, forecasts, and actuals in real time to identify variances early and keep projects financially on track.

Fund the best opportunities.

Compare investment scenarios, evaluate tradeoffs, and confidently prioritize the initiatives that deliver the greatest business value.

Ideal For:

- CFOs
- Finance Directors
- FP&A Teams
- PMO Leaders
- IT Finance Managers
- Capital Planning Teams
- Business Transformation Leaders
- PMO Leaders

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Key Capabilities

Strategic Investment Planning

Align investments with business priorities and balance funding across growth, innovation, operational improvements, and strategic initiatives.

Budget, Forecast & Actual Tracking

Manage budgets, forecasts, and actual spending across projects and portfolios with complete financial visibility from planning through execution.

Capital & Operating Expense Planning

Track CapEx and OpEx separately while managing custom cost types, funding sources, departments, and cost centers in a single financial workspace.

Financial Scenario Modeling

Evaluate multiple funding options before committing budget by modeling different investment scenarios against financial and resource constraints.

Executive Reporting & Analytics

Create real-time financial dashboards that give executives clear insight into portfolio spend, forecast accuracy, ROI, and investment performance.

Sofia AI for Financial Planning



Use Sofia AI to identify budget risks, highlight optimization opportunities, answer financial questions, and support better investment decisions with AI-powered guidance.

How it works

Build the financial picture → **Prioritize investments** → **Model scenarios** → **Track and adapt**

Bring budgets, forecasts, and investments into one connected view for complete financial visibility.

Compare costs, value, and strategic alignment to fund the initiatives with the greatest impact.

Test funding options and understand the financial impact across the business before making decisions.

Monitor budgets and forecasts in real time, then adjust as priorities and spending change.

OnePlan integrates with the tools you already use

MICROSOFT 365 & AZURE

Teams · SharePoint · Planner · Project Planner Premium · Power BI · Power Automate · Entra ID · Azure DevOps · Power Apps · Azure Data Lake · Project · Dynamics 365 · SQL Server

WORK & PROJECT MANAGEMENT

Jira · Asana · Trello · Aha! · Wrike · Smartsheet · monday.com

ITSM & AUTOMATION

ServiceNow · TOPdesk · Zapier

ERP, FINANCE & HR

Salesforce · SAP · Workday · UltiPro · PeopleSoft

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