OnePlan

FEATURE OVERVIEW

Project Portfolio Planning Software

Turn strategy into delivery with connected portfolio planning.



See the full picture. Fund the right work. Deliver with confidence.

Portfolio decisions fail when strategy lives in one place and execution lives in another. OnePlan Portfolio Planning closes that gap, giving PMOs and leaders a single, connected view to prioritize investments, model trade-offs, and track every initiative from strategic intent through to delivery.

OnePlan gives you the visibility and control to make confident investment decisions and adapt quickly when priorities change.

> *With OnePlan, portfolio planning is no longer reactive. We can model scenarios, align to strategy, and make informed decisions faster.*
>
> - Fortune 500 Manufacturing Company

Portfolio Planning Key Benefits

Align strategy with execution.

Ensure investments and resources are focused on the initiatives that matter most to the business. Connect day-to-day work with strategic objectives, improving alignment across teams and leadership.

Optimize investment and resource decisions.

Gain a clear understanding of where budgets, people, and time are being spent across the portfolio. Make informed trade-offs and maximize the value of every project and investment in the company.

Increase agility and confidence.

Adapt quickly when priorities, market conditions, or business needs change. Replace gut-feel prioritization with data-backed clarity across the full portfolio so your plans bend before they break.

Ideal For:

- PMO Director
- PMO Manager
- EPMO Director
- Portfolio Director
- Portfolio Manager
- Strategic Management Director
- Program Management Director

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Key Capabilities

Top-down portfolio management

Centralize portfolio planning and create visibility across strategic initiatives, programs, projects, and products. Use one connected view to support governance, prioritization, and executive decision-making.

Gantt charts and timeline planning

Visualize timelines, tasks, milestones, and dependencies across multiple projects. See how work is connected and understand how changes in one area can affect the broader portfolio.

What-if scenario planning

Explore different project, resource, and timeline combinations before finalizing the plan. Analyze cost, capacity, and strategic impact to choose the best path forward.

Reporting and BI dashboards

Create dashboards and reports that show the health of the portfolio. Track budget, schedule, resource utilization, and strategic alignment to support faster, more confident decisions.

Portfolio Roadmaps

Bring projects, programs, products, and initiatives into a single source of truth. Create an integrated view of portfolio work so leaders can make informed decisions with confidence.

Sofia AI for Portfolio Planning



Simply ask Sofia questions about portfolio performance, strategic priorities, resource capacity, and investment plans to receive instant answers and insights.

How it works

Capture and organize →

Bring initiatives, projects, products, and proposals into a structured portfolio. Group work by strategy, business capability, department, product line, or governance model.

Score and prioritize →

Evaluate work based on strategic alignment, value, cost, risk, benefits, and resource impact. Identify the initiatives that matter most.

Model scenarios →

Run what-if planning to compare possible portfolio mixes. Understand trade-offs across capacity, timing, budget, and business impact before decisions are finalized.

Monitor and adjust

Track progress through dashboards, Gantt charts, roadmaps, boards, and reports. Identify risks early and adjust plans as priorities 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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