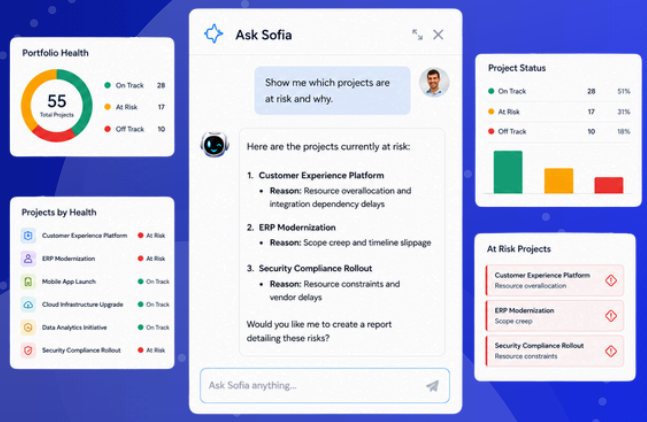
OnePlan

FEATURE OVERVIEW

Sofia AI

Your AI assistant that never sleeps



Automate busywork. Ask anything. Act faster.

Every project manager, PMO leader, and executive spends valuable time searching for updates, building reports, analyzing risks, and answering the same portfolio questions. Sofia, OnePlan's built-in AI assistant, helps eliminate that manual effort by turning natural language into instant insights, recommendations, and actions across your portfolio. Powered by Azure OpenAI and embedded throughout OnePlan, Sofia helps teams make faster, more informed decisions with confidence.

How can Sofia assist you?

Automate manual work.

Generate status updates, summarize project information, create reports, and complete repetitive planning tasks in seconds.

Get answers instantly.

Ask Sofia questions in plain English and receive immediate answers from your live portfolio, projects, resources, and financial data.

Make better decisions.

Identify risks, optimize resources, forecast outcomes, and prioritize investments using AI-powered recommendations.

> *"Sofia has become our first stop for portfolio questions. We get clear answers and recommendations in seconds instead of digging through multiple dashboards."*
>
> - Senior Portfolio Manager, Global Technology Company

Ideal For:

- PMO Director
- PMO Manager
- EPMO Director
- Portfolio Director
- Program Manager
- Resource Manager
- Project Manager
- Operations Director

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Key Capabilities

Natural Language Portfolio Intelligence

Ask questions like "Which projects are at risk?", "Show me overallocated resources," or "Which investments deliver the highest ROI?" and receive instant answers with explanations.

Automated Reporting & Summaries

Generate executive-ready project summaries, portfolio reports, stakeholder updates, and meeting recaps without manual effort. Sofia surfaces relevant data and creates full reports.

Risk & Forecast Analysis

Detect schedule, budget, and resource risks early while forecasting project completion, spending, and portfolio performance. Receive suggestions on project adjustments.

Resource & Budget Optimization

Receive recommendations for resource allocation, investment prioritization, and budget planning based on live portfolio data. Sofia can run what-if scenarios to make more informed decisions.

Data Quality Assistance

Identify missing information, inconsistencies, duplicate records, and unusual data patterns to improve portfolio accuracy and give you confidence in your information.

Portfolio Prioritization

Sofia goes beyond basic scoring models with AI that that analyzes competing initiatives, identifies tradeoffs, and recomends where to invest based on business value and organizational goals.



How Sofia Works

Sofia works alongside your team inside OnePlan, analyzing live project, portfolio, financial, and resource data as you work. Simply ask a question or give Sofia a task in natural language, and it instantly retrieves information, generates reports, identifies risks, recommends next steps, or updates plans—helping teams spend less time managing data and more time delivering results.

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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