OnePlan

One Master Plan for the Enterprise

We help enterprises set direction, align work, and deliver results



About OnePlan

OnePlan helps organizations bring every initiative, project, resource, and investment into a single view so leaders can understand what is impacting strategy and delivery.

By connecting work across Microsoft and other business systems, OnePlan creates one master plan of record for the enterprise.

- Connect strategy, portfolios, projects, resources, and financials
- Gain visibility into all work, no matter where it is managed
- Align teams around priorities, outcomes, and delivery goals
- Make better decisions with a complete view of organizational impact

Who We Serve

People

- C-suite executives
- PMO leaders
- Portfolio managers
- Strategy leaders
- Finance leaders
- Resource managers
- Delivery teams

Industries

- Life Sciences
- Healthcare
- Manufacturing
- Public Sector
- Technology
- Energy
- Oil and Gas
- Financial Services
- Infrastructure
- Retail
- Automotive
- Higher Education

Teams

- PMOs
- Operations
- Engineering
- R&D
- IT
- Service Delivery
- Digital Transformation
- Product Development
- Corporate Strategy
- Marketing

500+
Customers Worldwide

18+
Countries Served

5x
Microsoft PPM Leader

70+
Implementation, Solution, and Platform Partners

Founded: 2016

No. of employees: 170+

Headquarters: San Diego, California

Global footprint:

- North America
- Europe
- Zealand
- Middle East & Africa
- South America
- Australia/New Zealand

Global Accessibility

- Support for French, Spanish, German, and Arabic
- Regional settings and localized experiences
- Designed for distributed global teams

Industry Recognition

- Microsoft Partner of the Year winner/finalist (5 consecutive years)
- Forrester Wave™ Leader for Strategic Portfolio Management
- Gartner Peer Insights™ Voice of the Customer (2023 & 2024)
- Featured in Gartner research on Microsoft Project
- PMI Authorized Training Partner

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Key Capabilities

Strategic Portfolio Planning

Centralize portfolios, initiatives, roadmaps, goals, and outcomes in one decision layer. Prioritize work by strategic alignment, value, risk, capacity, and financial impact with consistent governance across the enterprise.

Resource and Capacity Management

Understand demand, availability, skills, and allocation across teams. Model capacity constraints and rebalance work before bottlenecks affect timelines, quality, or customer commitments across portfolios.

Financial and Investment Planning

Connect budgets, forecasts, costs, benefits, and funding decisions to portfolio plans. Compare scenarios and understand how investment choices affect resources, timing, and expected outcomes before approval.

Work Execution Flexibility

Let delivery teams work in the tools that fit their process while OnePlan rolls up status, dependencies, risks, and progress into a unified portfolio view.

Reporting and Analytics

Use dashboards, reports, and Power BI-ready data to monitor performance, identify issues, and communicate progress. Leaders gain real-time insight across strategy, finances, resources, and delivery.

AI-Powered Delivery with Sofia

Simply ask Sofia questions about projects, portfolios, resources, and investments to receive instant answers, summaries, and insights based on your OnePlan data.

What We Believe

Alignment across all teams

When people understand how their work connects to strategy, they make better decisions. We build for transparency at every level.

Adaptability beats rigidity

The best organizations evolve. We build tools that flex with how your teams actually work — not how a vendor thinks they should.

People first, always

Software doesn't execute strategy. People do. We obsess over the human experience — for our customers and for each other.

Focus on time-to-outcomes

The goal isn't more planning. It's faster outcomes. We help organizations move from idea to impact in the shortest possible time.

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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