OnePlan

OnePlan for Microsoft Teams

Strategic portfolio, financial, and resource management — embedded directly inside Teams. Define strategy, prioritize investments, and execute projects without ever leaving the app your teams live in.

Microsoft Teams is where work already happens — chat, files, meetings, approvals. But portfolio and project management usually lives somewhere else entirely, forcing constant context switching and leaving leadership with stale, disconnected data. OnePlan closes that gap by bringing full Strategic Portfolio Management natively into Microsoft Teams.

The Challenge

Context Switching
- Separate login and UI for PPM work
- No project data inside Teams channels
- Productivity lost to constant tool-switching

Siloed Data
- No single source of truth
- Budgets disconnected from delivery plans
- Resource data hard to consolidate

Lack of Visibility
- No live portfolio dashboards
- Status updates done manually
- Risk and resource blind spots

The Solution

OnePlan SPM
- Portfolio & program planning
- Financial management
- Resource capacity planning
- Work planning (Agile + Waterfall)
- Time tracking
- Status reporting & dashboards
- Sofia GPT AI assistant
- OnePlan Teams App in Left Hand Navigation

Natively Connected to Microsoft Teams
- Teams channel per project
- OnePlan tab in every channel
- Teams docs integration
- Auto-created Teams on plan creation
- Mobile access (iOS & Android)
- Microsoft 365 SSO & security

How the Integration Works

1 Install
Add OnePlan from Microsoft AppSource in seconds — no IT deployment needed.

2 Connect
Link plans to Teams channels automatically, or connect to existing Teams.

3 Create
Build projects, tasks and portfolios directly in OnePlan within Teams channels.

4 Collaborate
Threaded chat, document management and task updates in one Team.

5 Report
Real-time dashboards and automated status reports, inside Teams.

6 Govern
Approvals, timesheets and compliance workflows — all inside Teams.

What You Get Inside Teams

Portfolio Planning
- Intake, ideation & investment prioritization
- Kanban portfolio boards & roadmapping
- Power BI executive dashboards in Teams

Financial & Resource Planning
- Top-down budgets: CapEx, OpEx, internal, external
- Forecast vs. actuals with variance analysis
- Capacity vs. demand heat maps

Collaboration & Work Management
- Gantt, Kanban & To-Do in one solution
- Simplified timesheets with approvals
- Sofia GPT AI drafts updates & surfaces risk

Deep Teams Channel Integration
- Auto-create a Team for every new plan
- OnePlan tab pinned in every channel
- Contextual, in-Teams notifications
- OnePlan Teams App in Left hand Navigation

Insights, AI & Reporting
- Real-time, auto-refreshed portfolio health
- One-click reports to Word, PDF, Power BI
- Ask Sofia GPT natural-language questions

Plan smarter.
Deliver with confidence.

www.oneplan.ai

© 2026 OnePlan

OnePlan

ONEPLAN & MICROSOFT TEAMS

Why OnePlan for Microsoft Teams?

Purpose-Built for Microsoft 365
Native integration with Teams, SharePoint, Planner, Power BI, Azure DevOps and the Microsoft Cloud ecosystem

Enterprise-Grade PPM
Scales from simple to-do lists to complex, multi-billion-dollar portfolio governance

AI-Powered with Sofia GPT
Built-in insights, auto-summaries, risk detection and natural-language portfolio queries

No Context Switching
Full PPM functionality lives exactly where your teams already work, every day

Rapid Time to Value
Configuration templates and AppSource install mean you're live in hours, not months

Connect Any Work System
Works alongside Jira, Smartsheet, monday.com, Azure DevOps, Asana, Wrike, Trello and more

Integration Architecture — What Syncs Where

OnePlan Capability	Data Synced	Microsoft Teams Destination
Portfolio Planning	Plans & roadmaps	Team + channel
Financial Management	Budgets & forecasts	OnePlan tab
Resource Planning	Assignments & capacity	Team members
Work Management	Tasks, issues & risks	Channel tab view, OnePlan Teams App
Status Reporting	Dashboards & reports	Power BI in Teams

All data synced in real time via Microsoft Graph API, with enterprise-grade security through Microsoft 365 SSO.

Proven ROI & Trusted by Industry Leaders

OnePlan is recognized industry-wide for strategic portfolio management — and the same platform now runs natively inside Microsoft Teams.

4.3 / 5
G2 rating, 25+ verified reviews

500+
Global organizations run on OnePlan

2 yrs
Named in Gartner Peer Insights™ Voice of the Customer

Live in Hours
Install from Microsoft AppSource, no IT deployment

What Customers Achieve

Eliminate Manual Reporting
Replace spreadsheet status updates with real-time, Teams-connected dashboards

Optimize Resources Across Teams
See capacity, skills and utilization across every project in a single view

Close the Strategy-to-Delivery Gap
Connect OKRs, roadmaps and budgets to live work — no exports required

One Source of Truth
Replace fragmented Excel, PowerPoint and channel updates with one live portfolio view

Trusted by: Microsoft · Johnson & Johnson · Bridgestone · Molson Coors · PACCAR · Chevron · Capgemini · Hallmark · Mattel

"It integrates with the tools we are currently using and gives us the possibility to make the most of the entire stack, getting the best out of it. Ease in tracking and managing the project portfolio."
— Software Dev & Security Manager, Enterprise · G2 ★★★★★

"The ability to let business and IT work in their own systems, but integrate that data into OnePlan, provides unprecedented visibility into constraints, status and pipeline — allowing our PMs to prioritize the work that delivers the most value."
— Logistics & Supply Chain, Mid-Market · G2 ★★★★½

GET STARTED TODAY

Ready to bring enterprise PPM into your Teams?

1. Install from Microsoft AppSource — search 'OnePlan'
2. Start a free trial at oneplan.ai/trial
3. Watch a demo at oneplan.ai/videos
4. Contact us at oneplan.ai/contact-us

Plan smarter. Deliver with confidence.

www.oneplan.ai

© 2026 OnePlan