OnePlan

OnePlan and monday.com for Strategic Portfolio Management

Define strategy, prioritize work, and deliver results while your teams stay on their boards.

4.4 / 5
Gartner Peer Insights
101 ratings

500+
Global organizations
across every industry

Forrester
Strong Performer SPM
Tools Wave™

SOC 2
Type II · ISO 27001
ISO 27701 certified

Your Teams Keep Their Boards. Leadership Gets the Portfolio and Governance.

Boards Become Portfolio Plans
Every board becomes a portfolio initiative that can be prioritized, funded, and reported alongside other strategic work. Items land in the work plan with owners, dates and status intact.

Changes Flow Both Ways
Nine mappings ship ready to use, covering name, owner, start and due dates, status, parent and work breakdown. Edit in either system and the other keeps up.

Nobody Changes How They Work
Teams continue working in monday.com with no migration and no second system to adopt. Because people stay in the tool they already use, portfolio data stays accurate and current.

One Portfolio Inventory Across Every Tool
monday.com sits alongside Jira, Planner, Trello and Azure DevOps in the same dashboards, so leadership sees all work no matter where it is executed.

monday.com Runs the Work. OnePlan Runs the Investment.

monday.com helps teams execute work. OnePlan helps leaders prioritize, fund, and govern it.

9
Field mappings ship ready to use

0
Teams asked to migrate

↑
Portfolio visibility across every tool

Two jobs, two tools, one source of truth

> *OnePlan received the highest possible scores in the integration and roadmap criteria.*
>
> *-The Forrester Wave™: Strategic Portfolio Management Tools*

What You Gain

- Complete portfolio inventory and governance.
- Rank initiatives by strategic value, not by who asked loudest.
- Balance capacity against demand across every team and tool.
- Compare budget, forecast and actual spend at any portfolio level.
- Model what-if scenarios before committing people or money for all initiatives.

Trusted by: Microsoft · Johnson & Johnson · Bridgestone · Molson Coors · PACCAR · Purple · Kiewit · Ross Dress For Less

Plan smarter.
Deliver with confidence.

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From a Board to a Funded Initiative

monday.com
- Boards
- Items & subitems
- Groups
- Status columns

→

API Access
- Service account
- Personal API token
- Administrator to generate
- Board id for mapping

→

OneConnect
- Nine default mappings
- Three sync strategies
- Filters on both directions
- Scheduled sync jobs

→

OnePlan
- Plans & portfolio
- Work plan & dates
- Roadmaps & scenarios
- Capacity & financials

Bidirectional at task level. Scheduled jobs move data both ways, and any plan can be pushed or pulled on demand from OnePlan.

What Ships Out of the Box

Nine field mappings arrive configured, so a first board can be connected and syncing the same day.

Table	OnePlan field	monday.com field	Direction	Notes
Plans	Name	Name	Both	Required
Plans	Owner	Owners	Both	Required
Tasks	Name	Name	Both	Required
Tasks	Parent Id (Structure)	Parent Id	Both	Required
Tasks	WBS	Group Position	Both	Required
Tasks	Start	Timeline Start	Both	
Tasks	Due	Timeline End	Both	
Tasks	Status	Status	Both	
Lookups	Status (Task)	Status	Both	Required for lookups

Custom columns and dropdown values map through the same interface. Boards are created in monday.com; OnePlan connects to existing boards or builds plans from them.

Where Teams Use It

Visibility into execution across teams
Leadership sees status from operations, IT and creative teams without anyone switching tools or duplicating updates

Cross-team resource allocation
Assignments come across to assess workload across projects and teams, avoiding burnout and informing staffing

Budget versus actual tracking
Planned and actual cost sit against work executed in monday.com, giving finance real budget accountability

Strategic initiative tracking
Boards and items connect to strategic initiatives, so work provably aligns to business priorities

Forecasting future demand
Upcoming items and due dates forecast team and skillset demand, so the PMO manages capacity proactively

Unified reporting and dashboards
monday.com reports alongside Planner, Jira and Trello in one dashboard, whatever tool a team happens to use

Turn Your Boards Into a Portfolio

1. Talk to us: **oneplan.ai/contact-us**
2. Start a free trial at **oneplan.ai/trial**
3. Documentation: **support.oneplan.ai**

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