OnePlan

OnePlan and Salesforce for Sales-to-Delivery Alignment

Define Strategy · Prioritize Work · Deliver Results — connected to the pipeline you already sell.

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

Turn Won Opportunities into Delivered Projects

One Record, Full Lifecycle
Opportunities, accounts and custom objects in Salesforce carry into OnePlan and stay connected from opportunity creation and closing through planning, delivery and billing

Business Cases on Real Pipeline
Value, probability and close date land on the plan, so investment decisions use actual sales intelligence

Any Field, Standard or Custom
Map any Salesforce field to any OnePlan plan field, and set a default plan type for incoming records

Account Hierarchy Preserved
Configure Account then Opportunity and OnePlan mirrors the parent-child relationship as nested plans

Continuous Alignment
Stage and close-date changes in Salesforce carry through to the initiative on every scheduled run

Sandbox or Production
Point the connector at a Salesforce sandbox to prove out mappings before you switch to production

Where the Handoff Stops Being a Handoff

Delivery planning starts at qualification

Portfolios shaped around strategic accounts

2
Sync strategies, with or without hierarchy

0
Lines of custom code to write

↑
Pipeline visibility for delivery teams

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

What You Gain

- Delivery planning that begins the day an opportunity is qualified
- Portfolios prioritized around your most strategic accounts
- Business cases grounded in pipeline value and probability
- One system of engagement from sale through delivery to billing

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Deliver with confidence.

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How the Salesforce Connector Works

Salesforce	Connected App	OneConnect	OnePlan
• Opportunity • Account • Any custom object • Standard & custom fields	• Username & password • Security token • Consumer key & secret • Sandbox or production	• Manual field mapping • OnePlanUpdate strategy • Record filters • Schedule & job logs	• Plans • Nested plan hierarchy • Default plan type • Portfolio & business case

One-way by design: Salesforce records create and update OnePlan plans. The connector does not create records in Salesforce.

Two Sync Strategies

OnePlanUpdate

Creates and updates OnePlan plans from the Salesforce objects you configure, and maintains the parent-child relationship between them.

Configure Account then Opportunity and OnePlan nests opportunity plans beneath their account.

OnePlanUpdate_No_Hierarchy

Creates and updates the same plans from the same objects, without applying any parent-child nesting.

Use when every record should land as a flat, top-level plan in the portfolio.

Setup, Scheduling and Scope

What You Need

A licensed Salesforce user account for the integration, and a connected app supplying a consumer key and secret.

In OnePlan, Owner permissions to generate a per-integration Authentication Key — it is not visible again after the page refreshes.

OneConnect Administrator or Editor rights.

Scheduling

No schedule ships preset — the strategy runs on demand until you configure one.

Basic: manual execution only.
Professional: scheduled runs, up to two delta runs a day.
Enterprise: up to 24 runs a day.

Plans can also be pulled on demand from the plan itself.

Scope and Limits

Salesforce to OnePlan only — no records are created in Salesforce from OnePlan.

Records land as Plans. Schedules, financial plans and resources are not part of this connector.

No default field mappings ship — every field is mapped explicitly during setup.

Filters apply to scheduled runs, not event-triggered runs.

Where Teams Use It

Opportunity-driven project initiation
Start delivery planning as soon as a high-value opportunity is identified, cutting the lag between sales and execution

Pipeline visibility for portfolio managers
Give portfolio managers a view of the pipeline so forecasting and resourcing stay ahead of what is closing

Continuous sales-to-delivery alignment
Opportunity stage and date changes update the linked initiative, reducing handoff friction

Account-based portfolio planning
Sync key accounts to manage and prioritize the portfolio around strategic customer relationships

Integrated business case development
Build business cases on synced value, probability and close date rather than on estimates

Professional services delivery
Feeds OnePlan's PSA capability — delivery, cost and billing visibility organized by account

Connect Your Pipeline to Delivery

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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