OnePlan

OnePlan and Smartsheet for Strategic Portfolio Management

Define strategy, prioritize work, and deliver results without asking a single team to move.

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 Sheets. Leadership Gets the Portfolio and Governance.

Sheets Become Portfolio Plans
Every sheet becomes a portfolio initiative that can be prioritized, funded, and reported alongside all other strategic work. Rows land in the work plan with owners, dates and progress intact.

Changes Flow Both Ways
Ten mappings ship ready to use, covering name, owner, assignee, dates, status, percent complete and predecessors. Edit in either system and the other keeps up.

Nobody Changes How They Work
There is no migration and no second system to adopt. Teams stay in Smartsheet, which is exactly why the portfolio data stays current instead of going stale in week two.

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

Teams keep the software they love while executives gain the visibility needed to prioritize the most important work.

Smartsheet Runs the Work.
OnePlan Runs the Investment.

Two jobs, two tools, one source of truth

10
Field mappings ship ready to use

0
Teams asked to migrate

↑
Portfolio visibility across every tool

> *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.
- Track budget against actuals for work executed in Smartsheet.
- Model what-if scenarios before committing people or money for all initiatives.

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Plan smarter.
Deliver with confidence.

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From a Sheet to a Funded Initiative

Smartsheet
- Sheets
- Rows
- Columns & dropdowns
- Assigned To

→

API Access
- Service account
- API access token
- Pro, Business or Enterprise
- Optional template

→

OneConnect
- Ten default mappings
- Three sync strategies
- Filters on both directions
- Schedule plus live events

→

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

Bidirectional. Scheduled jobs pull Smartsheet into OnePlan, and saving a connected plan in OnePlan publishes straight back to the sheet.

What Ships Out of the Box

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

Table	OnePlan field	Smartsheet field	Direction	Notes
Plans	Name	Name	Both	Required
Plans	Owner	Owner	Both	Recommended
Tasks	Name	Task Name	Both	Required
Tasks	Assigned To	Assigned To	Both	
Tasks	Start	Start	Both	
Tasks	Due	Finish	Smartsheet to OnePlan	Recommended
Tasks	Status	Status	Both	
Tasks	% Done	% Complete	Both	
Tasks	Task Dependency	Predecessors	Both	
Lookups	Status (Task)	Status	Both	

Custom columns and dropdown values map through the same interface, and value mapping reconciles choices that differ between the two systems.

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 sync 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 Smartsheet, giving finance real budget accountability

Strategic initiative tracking
Sheets connect to strategic initiatives, so work provably aligns to business priorities and outcomes get tracked

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

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

Turn Your Sheets 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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