OnePlan

Strategic Portfolio and Work Management

One platform to set direction, align work, and deliver results



Align work to strategy. Optimize resources and financials. Accelerate delivery with confidence.

Organizations need to connect strategy, portfolios, resources, financials, and execution without forcing every team into the same way of working.

OnePlan brings teams, tools, and data together in one place so leaders can gain visibility, make better decisions, and deliver measurable business impact while empowering teams to work the way they work best. By connecting teams, tools, and data, OnePlan gives leaders the clarity to prioritize the right work and deliver results with confidence.

Key Benefits

Gain enterprise clarity and control.

Connect goals, portfolios, and execution in one platform so every investment supports strategic priorities and teams can focus on the work that drives measurable outcomes.

Balance capacity and spend.

Balance capacity, budgets, and demand across portfolios to make confident trade-offs, improve resource allocation, and maximize ROI before work is committed to execution.

Turn plans into outcomes.

Connect teams, tools, and data to improve visibility, remove execution friction, and help organizations deliver results faster without disrupting how teams work best.

> *OnePlan has really helped us build visibility and prioritize strategic projects in our global company.*
>
> - Debmitra Das, Corporate Program Manager, Wahl

Built for Microsoft Users

Our next-gen portfolio and resource management platform extends the Microsoft cloud into a complete strategy-to-execution platform connecting Teams, Project, Planner, Power Apps, Power BI, Dynamics 365, Azure DevOps, and SharePoint so organizations can modernize portfolio management without leaving the tools their teams already use.

Ideal for: C-suite executives; PMO leaders; Portfolio managers; Strategy leaders; Finance leaders; Resource managers; Delivery teams

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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.

Teams we serve

PMOs

Operations

Engineering

R&D

IT

Service Delivery

Digital Transformation

Product Development

Corporate Strategy

Marketing

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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