OnePlan

TEAM SPECIFIC OVERVIEW

Deliver and Delight, Every Engagement

OnePlan for Service Delivery Organizations



Optimize your resources. Ensure profitable engagements. Deliver and delight clients.

Service delivery teams must balance client commitments, resource availability, and profitability, all while priorities shift. When opportunities, resources, and financials live in disconnected systems, margins slip and deadlines are missed. OnePlan closes that gap with one connected view from opportunity intake through delivery.

OnePlan gives service leaders the visibility and control to forecast confidently, optimize capacity, and adapt quickly as client demands change.

Key Benefits

Improve forecasting accuracy.

Estimate proposal timelines and costs with greater accuracy, improving forecasting and efficient project planning right from the start so teams commit to the right work with confidence.

Optimize resource management.

Balance demand and capacity across teams, roles, and named resources. Identify bottlenecks before they impact commitments and keep the right people on the right work at the right time.

Maximize project profitability.

Integrate with leading financial systems to generate real-time project financials, ensuring accurate tracking of budgets, costs, and overall profitability across every engagement.

> *Our utilization and margins have never been easier to protect. We can see capacity and demand together, staff the right people to the right engagements, and catch risks before they cost us.*
>
> - Service Delivery Director, Global Professional Services Firm

Ideal For:

- Chief Delivery Officer
- VP of Professional Services
- Service Delivery Director
- Resource Management Director
- Portfolio Director
- Program Delivery Director
- Engagement Director

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Key Capabilities

Seamless Opportunity Intake

Estimate proposal timelines and costs with greater accuracy, ensuring more reliable forecasting and efficient project planning right from the start of every engagement.

Portfolio Planning and Forecasting

Balance team workloads with enhanced visibility across in-flight and proposed opportunities, while powerful revenue forecasting modeling provides clarity on potential financial outcomes.

Resource Capacity Management

Gain a combined, dynamic view of capacity and utilization across teams, roles, contracts, clients, departments, and geographies—identifying bottlenecks before they impact commitments.

Project Financial Management

Integrate with leading financial systems to generate real-time project financial data, ensuring accurate tracking of budgets, costs, and overall profitability.

Connect Any Work Management Tool

Enable teams to work as each contract or client dictates—from to-do lists to Agile sprints to waterfall projects—while retaining resource visibility and overall control.

AI-Powered Delivery with Sofia



Simply ask Sofia questions about projects, resources, investments, and portfolio performance to receive instant answers, summaries, and insights.

How it works

Intake opportunities →

Estimate proposal timelines and costs up front for more accurate forecasting and efficient project planning from the very start of each engagement.

Plan the portfolio →

Balance team workloads and resources across in-flight and proposed opportunities, using revenue forecasting to bring clarity to potential financial outcomes.

Execute flawlessly →

Deliver within the Microsoft 365 ecosystem, integrating with the execution tools your teams already use for seamless collaboration and efficient project delivery.

Manage financials

Integrate with leading financial systems to generate real-time project financials and track budgets, costs, and profitability throughout delivery.

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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