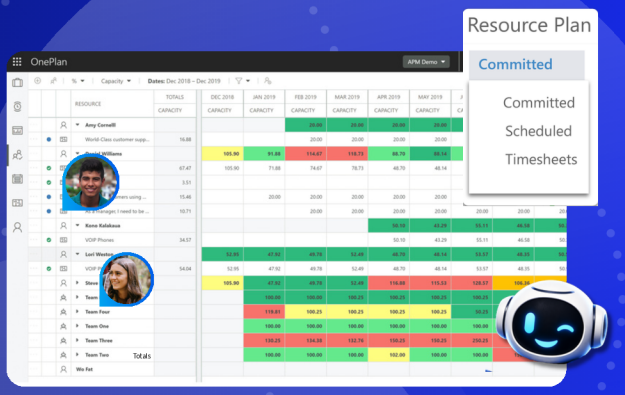
OnePlan

FEATURE OVERVIEW

Resource & Capacity Planning



Balance resources. Manage capacity. Assign the right people.

Organizations can't deliver projects successfully without understanding who is available, what they're working on, and where demand exceeds capacity.

OnePlan gives leaders a complete view of resources across teams, helping them forecast workload, balance assignments, and make informed staffing decisions before projects fall behind.

> *We finally have visibility into our resource capacity across teams. We can forecast demand, balance workloads, and make staffing decisions before projects are impacted.*
>
> - Fortune 500 Manufacturing Company

Resource Planning Key Benefits

Centralize resource visibility.

Ensure investments and resources are focused on the initiatives that matter most to the business. Connect day-to-day work with strategic objectives, improving alignment across teams and leadership.

Optimize capacity with confidence.

Forecast future demand, compare it against available capacity, and rebalance work before resource conflicts impact delivery. Make proactive staffing decisions instead of reacting to bottlenecks.

Match the right people to the right work.

Assign resources based on skills, roles, availability, location, or department. Ensure critical initiatives have the people they need while maximizing utilization across the business.

Ideal For:

- Portfolio Managers
- Resource Managers
- PMO Leaders
- Project & Program Managers
- IT & Engineering Leaders
- Professional Services Teams
- Operations Leaders

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Key Capabilities

Enterprise Resource Planning

Manage people, roles, contractors, and teams from a centralized resource pool. Create a consistent planning process across departments while improving visibility across the organization.

Resource Forecasting

Forecast future resource needs across projects, portfolios, and business initiatives. Understand upcoming demand to support hiring, budgeting, and strategic planning.

Skills-Based Resource Management

Assign work based on skills, certifications, roles, departments, or locations to ensure the right people are working on the highest-priority initiatives.

Capacity Planning

Compare planned demand against available capacity to identify shortages or excess availability before work begins. Adjust staffing plans proactively as priorities change.

Resource Analytics and Reporting

Monitor utilization, availability, allocation, and workload with real-time dashboards and reports. Give managers and executives the visibility they need to optimize performance.

Sofia AI for Resource Planning



Use AI to identify resource constraints, recommend staffing adjustments, highlight utilization trends, and help optimize capacity planning across your organization.

How it works

Capture demand →

Collect resource requests from projects, portfolios, and business initiatives. Define required roles, skills, effort, and timelines to build a complete view of future demand.

Match resources →

Identify available team members based on skills, availability, utilization, and capacity. Quickly find the best fit for every assignment.

Balance workloads →

Compare capacity against demand and adjust assignments to eliminate bottlenecks, avoid overallocations, and improve overall utilization.

Monitor and optimize

Track utilization, availability, forecasts, and resource performance through dashboards and reports. Continuously optimize plans as priorities and staffing needs evolve.

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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