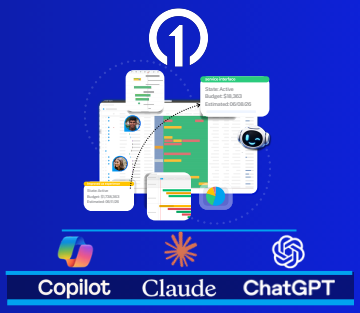
OnePlan

ULTIMATE BASIC

Start Simple. Fully Supported. AI-Ready.

Basic, Premier Success, Advantage, the MCP Server and 5 AI credits per user each month — in one license.



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

One License. Everything Included.

Basic
Lightweight portfolio and work management for teams getting started with structured planning.

Premier Success
Priority support and faster SLAs, quarterly business reviews, OnePlan Academy LMS, advisory council and early feature access.

Advantage
Ongoing configuration and administration support from the OnePlan team, stackable with Premier Success.

MCP Server
Connect Microsoft Copilot, Claude and ChatGPT to OnePlan, with each person's permissions in force.

5 AI Credits
Capped OnePlan AI credits, per user, per month. Add more with AI Bundles.

WHAT ULTIMATE BASIC INCLUDES

- ✓ Submit ideas and requests
- ✓ Plan details view
- ✓ My Work, create and assign work items
- ✓ Microsoft Teams, files and mobile app
- ✓ Objectives and key results
- ✓ Grid work planner
- ✓ Timesheets and time off
- ✓ Portfolio and work email notifications
- ✓ Tree and Gantt portfolio views
- ✓ Backlogs, issues, risks and work types
- ✓ OnePlan Charts
- ✓ Insights AI and Sofia GPT

5 AI Credits a Month. Built Into Every License.

Capped, predictable AI usage — expand any time with AI Bundles.

5
AI credits per user per month

0
Credits for standard MCP actions

+
More usage through AI Bundles

> *Many OnePlan MCP tools consume no AI credits, including standard data retrieval and update operations.*
>
> *-OnePlan*

What You Gain

- One license and one renewal, with support and AI included.
- Priority support and ongoing admin help from day one.
- Ask OnePlan questions from Microsoft Copilot, Claude or ChatGPT.
- Predictable AI spend with a capped monthly allowance.

Trusted by: Microsoft · Johnson & Johnson · Bridgestone · Molson Coors · PACCAR · Purple · Kiewit · Ross Dress For Less

Plan smarter.
Deliver with confidence.

www.oneplan.ai

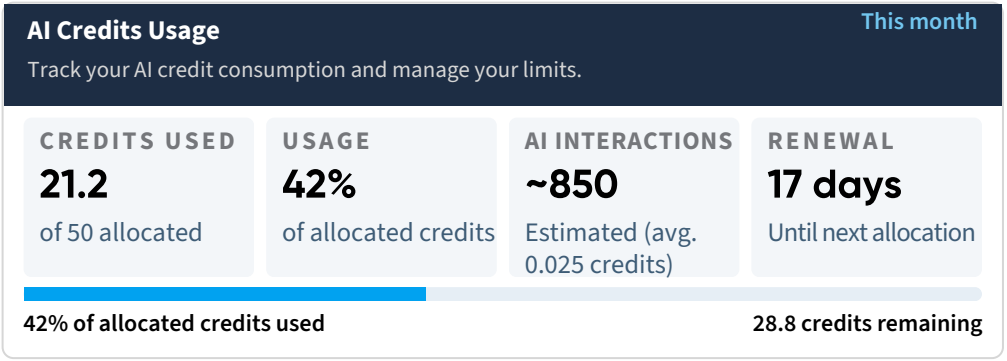
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How Your AI Credits Work

Ultimate Basic includes 5 capped OnePlan AI credits per user, per month. Usage depends on request complexity, data processed and the AI model used. Credits are consumed mainly by advanced capabilities that use large language models for analysis, reasoning and responses.

See Every Credit

- ✓ Credits used against allocation
- ✓ Usage and credits remaining
- ✓ Estimated AI interactions
- ✓ Days until next allocation



Settings › AI Credits. Sample data shown.

Activity	Estimated credits	Typical request
Quick questions	0.01–0.03	Find a specific answer, such as “Which projects are overdue?”
Portfolio insights	0.02–0.05	Summarize portfolio status, trends, risks or key priorities.
Standard MCP actions	0	Retrieve or update OnePlan records using MCP tools, without LLM processing.
Complex AI analysis	0.10–0.30	Analyze multiple datasets, evaluate trade-offs or recommend actions.

Credit-Free Actions (MCP)

Many OnePlan MCP tools do not use AI credits, including standard data retrieval and update actions — find, create, update, move. Connect Microsoft Copilot, Claude or ChatGPT and handle everyday portfolio work without drawing down your allowance.

Use Your Credits Efficiently

- ✓ Be specific and focused in your requests.
- ✓ Limit scope to specific projects or time periods.
- ✓ Keep responses concise.
- ✓ Use MCP tools for common tasks — no credits.
- ✓ Reuse conversation context for follow-ups.

Put It to Work

TEAM MEMBER
“What's on my plate this week? Mark the data migration task 75% complete.”

PMO
“Here are my meeting notes. Log the risks and decisions on the CRM Upgrade plan.”

PORTFOLIO LEAD
“Which projects are overdue?”

EXECUTIVE
“Summarize portfolio status, trends, risks and key priorities.”

PROJECT MANAGER
“List the open high risks on Project Atlas and who owns each one.”

CONTRIBUTOR
“Submit a new idea for a customer self-service portal.”

Manage AI Credit Limits

Administrators can set AI credit limits by group and individual user, giving power users more and adjusting as needs evolve.

Need More AI?

Additional AI usage can be purchased through OnePlan AI Bundles.

AI credit estimates are illustrative; actual consumption varies by AI model, request complexity, data volume and processing requirements. MCP tools work only for modules enabled in your edition. The OnePlan MCP Server is available in preview; features and tools may change.