



Strategic Portfolio Management

As a business leader, if you know exactly what your organization needs to do and exactly how you are going to do it, you do not need strategic portfolio management. For everyone else, there is OnePlan.

Whether your portfolios consist of products, services or projects, strategic portfolio management means being able to change direction regularly and rapidly, based on trustworthy data that is easily visible and complete. It means having measurable goals and strategies (objectives and key results, or OKRs), followed by aligning ideas and activities to those OKRs. Finally, it requires making good decisions on the sequencing and resequencing of your initiatives based on metrics of value, capacity and business performance.

CONFIDENTLY ADAPT TO MARKET CHANGES

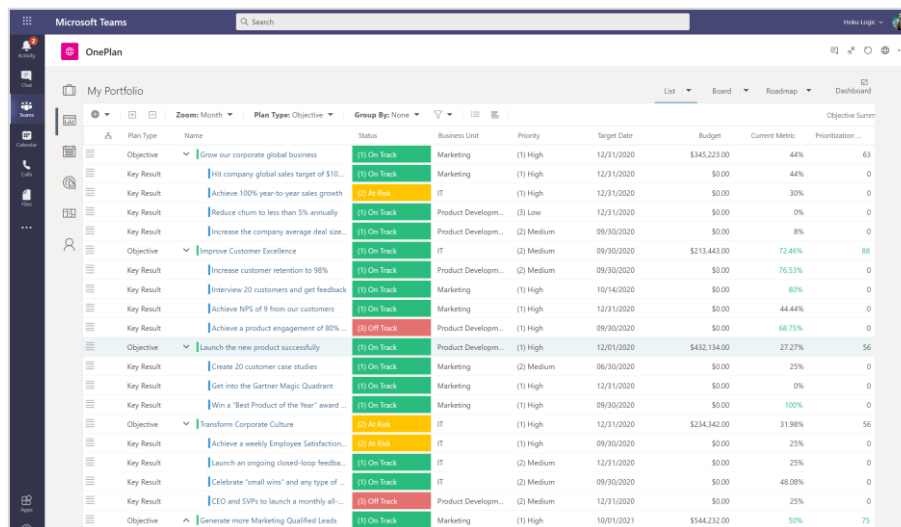
Change direction regularly & rapidly, based on trustworthy data that is easily visible and complete.

MEASURE PROGRESS TO GOALS & STRATEGIES

Define measurable goals & strategies with ideas and activities aligned to OKRs

OPTIMIZE FLOW OF VALUE

Sequence and resequence your initiatives based on value, capacity and business performance.



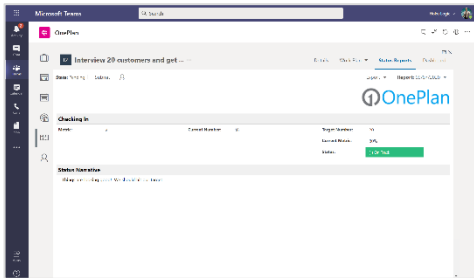
Plan Type	Name	Status	Business Unit	Priority	Target Date	Budget	Current Metric	Objectives Summary
Objective	Grow our corporate global business	(1) On Track	Marketing	(1) High	12/31/2020	\$345,223.00	44%	63
Key Result	Hit company global sales target of \$10...	(1) On Track	Marketing	(1) High	12/31/2020	\$0.00	44%	0
Key Result	Achieve 100% year-to-year sales growth	(2) At Risk	IT	(1) High	12/31/2020	\$0.00	30%	0
Key Result	Reduce churn to less than 5% annually	(1) On Track	Product Develop...	(3) Low	12/31/2020	\$0.00	0%	0
Key Result	Increase the company average deal size...	(1) On Track	Product Develop...	(2) Medium	09/30/2020	\$0.00	8%	0
Objective	Improve Customer Excellence	(1) On Track	IT	(2) Medium	09/30/2020	\$213,443.00	72.46%	88
Key Result	Increase customer retention to 98%	(1) On Track	Product Develop...	(2) Medium	09/30/2020	\$0.00	76.53%	0
Key Result	Interview 20 customers and get feedback	(1) On Track	Marketing	(1) High	10/14/2020	\$0.00	80%	0
Key Result	Achieve NPS of 9 from our customers	(1) On Track	Marketing	(1) High	12/31/2020	\$0.00	44.44%	0
Key Result	Achieve a product engagement of 80%	(3) Off Track	Product Develop...	(1) High	09/30/2020	\$0.00	68.75%	0
Objective	Launch the new product successfully	(1) On Track	Product Develop...	(1) High	12/01/2020	\$432,134.00	27.27%	56
Key Result	Create 20 customer case studies	(1) On Track	Marketing	(2) Medium	06/30/2020	\$0.00	25%	0
Key Result	Get into the Gartner Magic Quadrant	(1) On Track	Marketing	(1) High	12/31/2020	\$0.00	0%	0
Key Result	Win a "Best Product of the Year" award...	(1) On Track	Marketing	(1) High	09/30/2020	\$0.00	100%	0
Objective	Transform Corporate Culture	(2) At Risk	IT	(1) High	12/31/2020	\$234,342.00	31.98%	56
Key Result	Achieve a weekly Employee Satisfaction...	(1) At Risk	IT	(1) High	09/30/2020	\$0.00	25%	0
Key Result	Launch an ongoing closed-loop feedba...	(1) On Track	IT	(2) Medium	12/31/2020	\$0.00	25%	0
Key Result	Celebrate "small wins" and any type of...	(1) On Track	IT	(2) Medium	09/30/2020	\$0.00	48.08%	0
Key Result	CEO and SVPs to launch a monthly all...	(2) Off Track	Product Develop...	(2) Medium	12/31/2020	\$0.00	25%	0
Objective	Generate more Marketing Qualified Leads	(1) On Track	Marketing	(1) High	10/01/2021	\$544,232.00	50%	75

OnePlan | Strategic Portfolio Management

OnePlan empowers business leaders to define Objectives and Key Results (OKRs) across programs, teams and departments, create visual roadmaps, and measure progress.

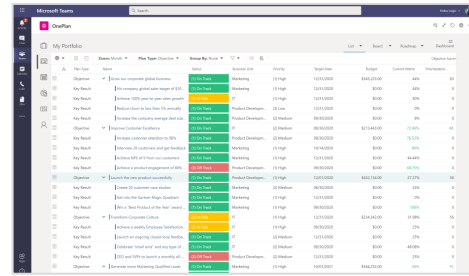
Align OKR's to your unique hierarchy

Whether you need a view by business unit, value stream, program or product area, OnePlan supports the many hierarchies and matrices in an enterprise.



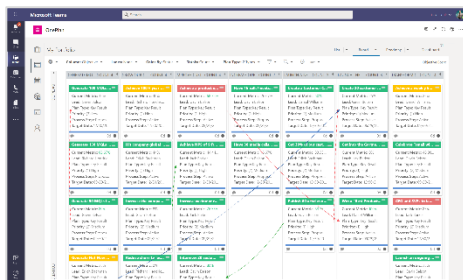
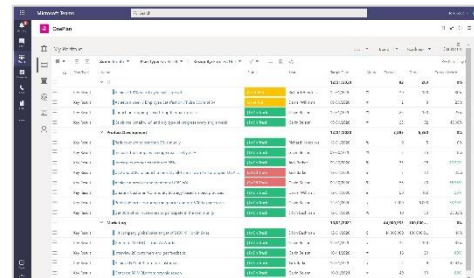
Effortlessly update progress against OKRs

Accountable owners and contributors can easily update progress routinely against OKRs.



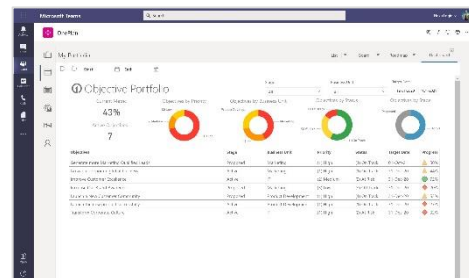
Provide visibility to portfolio level progress on strategies & initiatives

Portfolio dashboards provide real-time progress to the team, as well as enabling reports and performance analyses of trending over time.



Gain insight & understanding to interdependencies between your objectives

OnePlan board views enable you to gain insights into connections & patterns, edit them on the fly and drag & drop items to re-order and re-categorize



Analyze & predict business performance with persona-based dashboards

Analyze & forecast business performance over time, including progress against OKRs, financial budget status, forecasts against investment targets & more.



Understand the size & timing of your portfolio with rich roadmap visualizations

OnePlan roadmap views provide a rich visualization for understanding the overall size and timing of your portfolio.