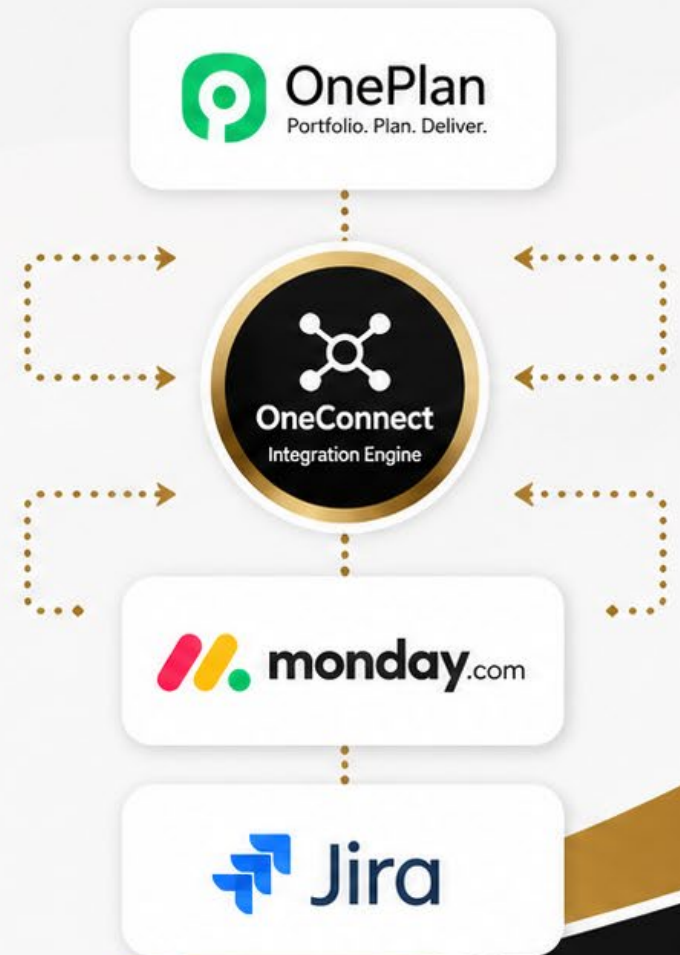




OnePlan, Monday.com & Jira Integration Demo

*Connecting Strategy to Execution.
One Source of Truth.*



Unified Portfolio
Visibility



Real-Time
Synchronization



Better Decisions.
Faster.



Governed.
Secure. Scalable.

Connecting Strategy to Execution

Today's organizations rely on multiple best-in-class tools. The challenge is connecting strategy work and resources for enterprise visibility and alignment.



Unified Visibility

Gain a single, real-time view across portfolios, project and teams.



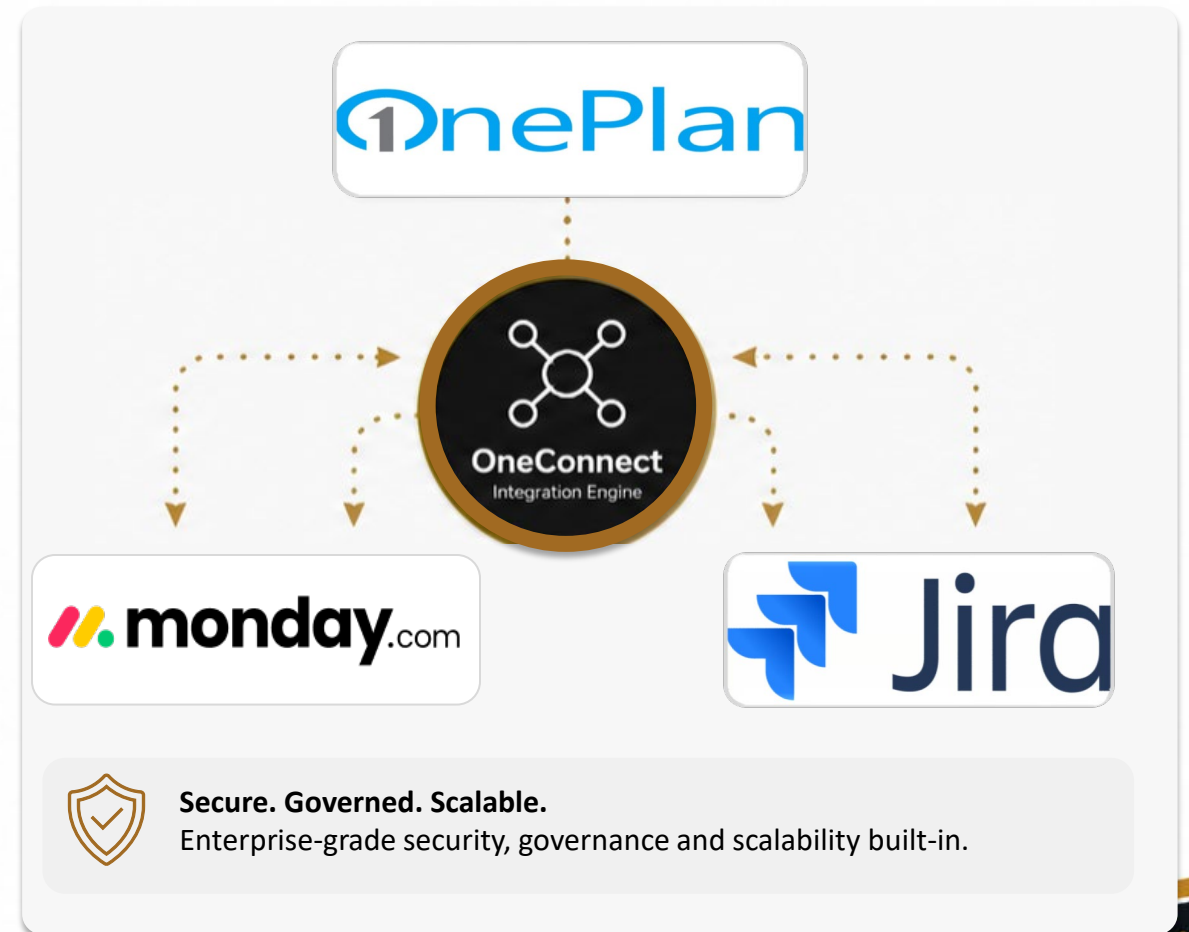
Real-Time Synchronization

Bi-directional data flow keeps everyone aligned across systems.



Better Decisions. Faster.

Accurate data, aligned teams, and informed decisions drive better outcomes.



Business Challenge

Organizations rely on multiple tools across teams, but disconnected systems create silos, inefficiencies, and blind spots for leadership.



Disconnected Work Management Tools

Teams use different platforms with no seamless connection.



Duplicate Data Entry

Information is re-entered across systems, creating errors and wasting time.



Limited Executive Visibility

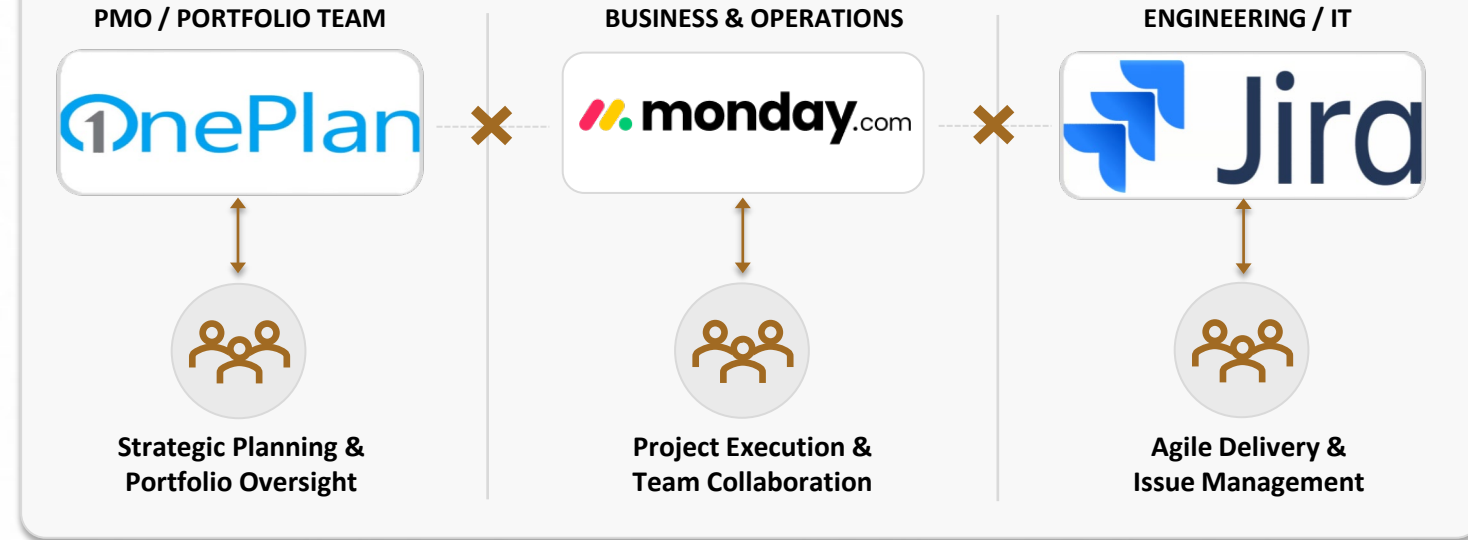
Leaders lack a real-time consolidated view across portfolios and teams.



Manual Reporting

Time-consuming reports delay decisions and reduce agility

DISCONNECTED. SILOED. INEFFICIENT.



Wasted Time
and Resources



Poor Alignment
Across Teams



Delayed Decisions
and Outcomes



Increased Risk
and Rework

Target Architecture



Executives & PMO

Gain enterprise visibility, portfolio oversight, and strategic alignment.



OnePlan Portfolio Layer

Central source of truth for all portfolios, programs, and projects.



OneConnect Integration Layer

Secure, bi-directional synchronization engine that connects systems and data.



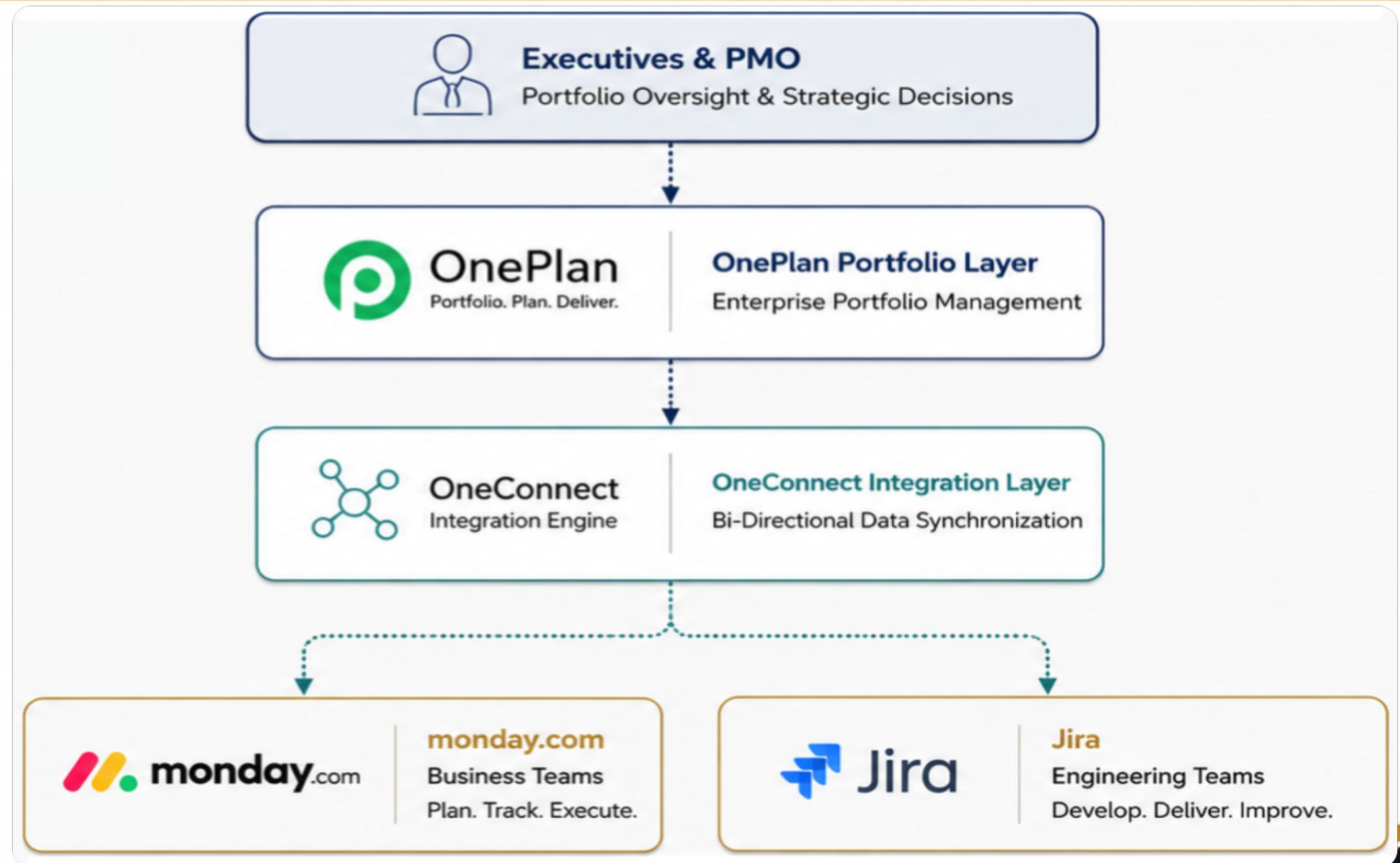
monday.com (Business Teams)

Business, operations, and marketing teams plan and track work in monday.com.



Jira (Engineering Teams)

Engineering and product teams plan, develop, and deliver in Jira.



monday.com Example

monday.com provides business teams with a flexible, visual workspace to plan, track and collaborate in real time.



Sample Board: Product Launch

Manage initiatives; tasks and deliverables across the product launch lifecycle.



Key Columns

Status, Owner, Due Date, Priority, Budget, Risk



Purpose

Business users continue working in Monday.com with no change to their existing process.



Integrated & Synchronized

OneConnect ensures data flows bi-directionally with OnePlan and Jira for end-to-end visibility

The screenshot shows a Monday.com board titled "Product Launch" with a "Main Table" view. The table has columns for Item, Status, Owner, Due Date, Priority, Budget, and Risk. It is organized into three sections: Planning, Execution, and Go Live. The Planning section includes Market Research (Done), Product Requirements (Done), and Competitive Analysis (In Progress). The Execution section includes Design (In Progress), Development (In Progress), and QA Testing (Not Started). The Go Live section includes Launch Readiness (Not Started) and Go Live (Not Started). Each row shows a status button, an owner profile picture, a due date, a priority button, a budget amount, and a risk button.

Item	Status	Owner	Due Date	Priority	Budget	Risk
Planning						
Market Research	Done	[Owner]	May 15	High	\$25,000	Low
Product Requirements	Done	[Owner]	May 22	High	\$40,000	Medium
Competitive Analysis	In Progress	[Owner]	May 29	Medium	\$15,000	Low
+ Add Item						
Execution						
Design	In Progress	[Owner]	Jun 5	High	\$50,000	Medium
Development	In Progress	[Owner]	Jun 19	High	\$120,000	High
QA Testing	Not Started	[Owner]	Jul 3	Medium	\$30,000	Medium
+ Add Item						
Go Live						
Launch Readiness	Not Started	[Owner]	Jul 10	High	\$20,000	Medium
Go Live	Not Started	[Owner]	Jul 17	High	\$10,000	Low
+ Add Item						

Jira Example



Epic → Stories → Tasks → Bugs

Jira provides structure and traceability for agile delivery from strategy to execution.



Agile Delivery Remains in Jira

Teams plan, develop, and deliver using existing agile workflows and boards.



Engineering Teams in Flow

Developers, QA, and DevOps continue using Jira for backlog management and tracking.



Integrated & Connected

OneConnect keeps Jira data synchronized with OnePlan for enterprise visibility.



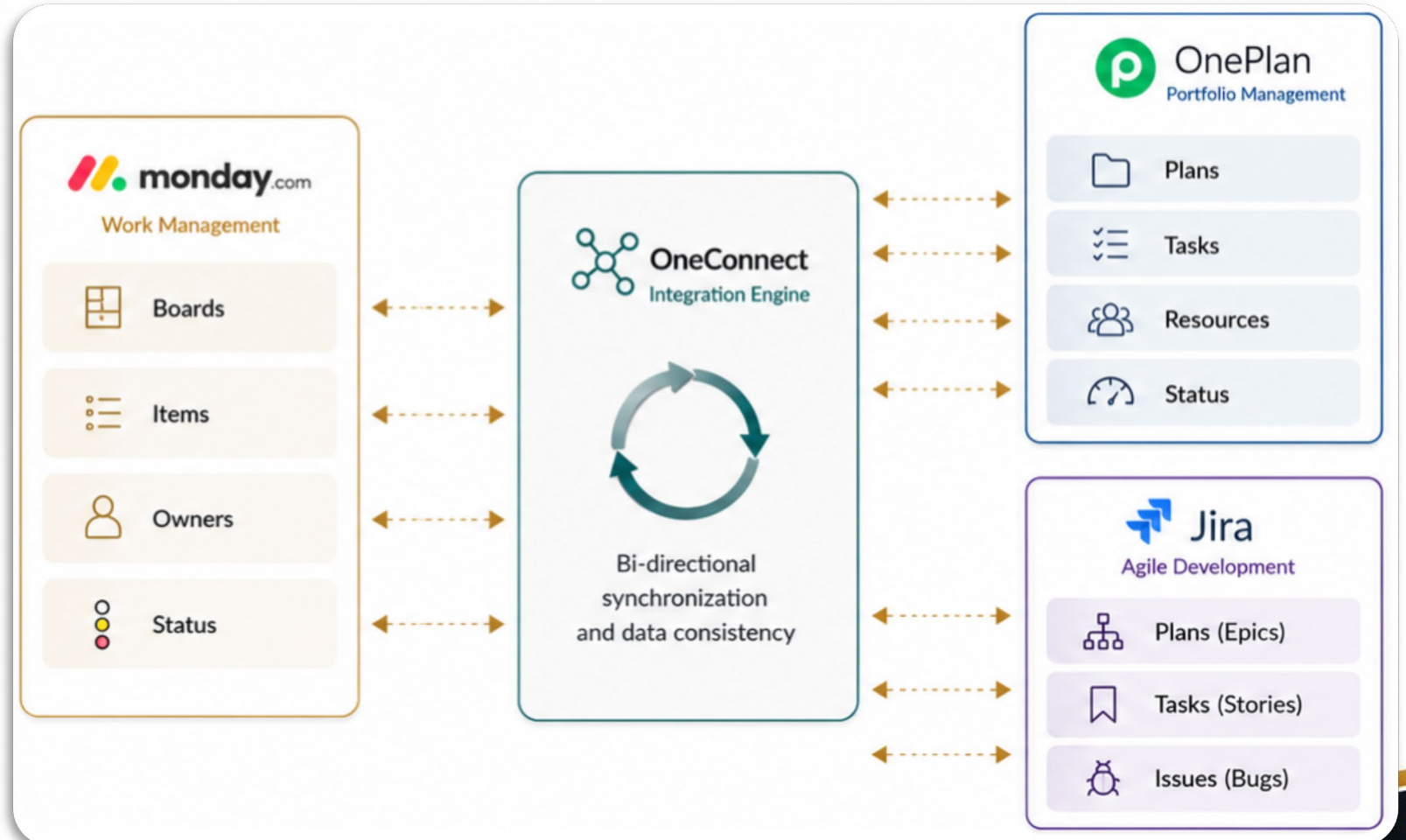
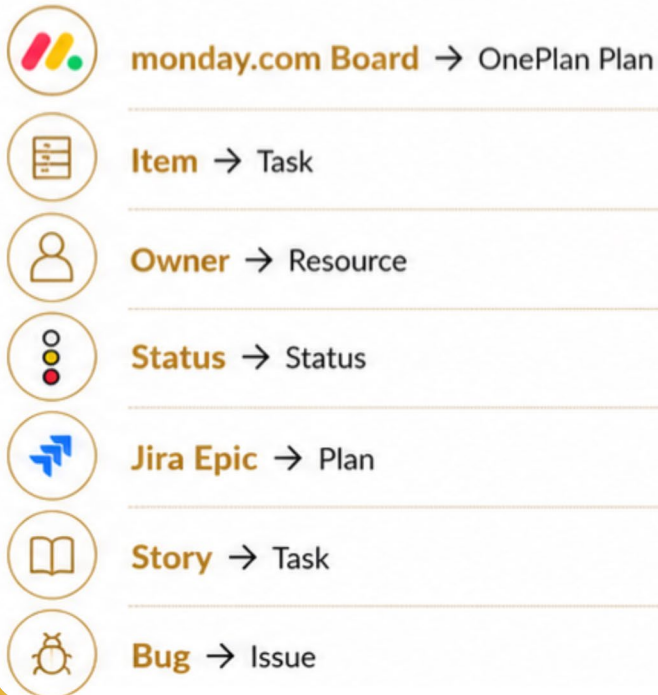
Product Launch Initiative

Share ... Create

Search backlog	RS	Epic	Type	Status	* Assignee	Clear filters
Summary	Type	Status	Assignee	Priority	Sprint	
PLAT-1 Product Launch	Epic	IN PROGRESS	R. Smith	High	PI-1	
PLAT-11 Market Research & Validation	Story	DONE	A. Davis	Medium	PI-1	
PLAT-12 Define Product Requirements	Story	DONE	J. Nguyen	High	PI-1	
PLAT-13 Create Launch Plan	Story	IN PROGRESS	M. Lee	Medium	PI-2	
PLAT-2 Build & Develop	Epic	IN PROGRESS	R. Smith	High	PI-2	
PLAT-21 Design UI/UX	Task	IN PROGRESS	A. Davis	Medium	PI-2	
PLAT-22 Develop Core Features	Task	IN PROGRESS	J. Nguyen	High	PI-2	
PLAT-23 QA & Testing	Task	TO DO	M. Lee	Medium	PI-3	
PLAT-24 Fix Defects	Bug	TO DO	D. Patel	High	PI-3	
+ Create issue						

Integration Mapping

OneConnect enables bi-directional synchronization between monday.com, OnePlan, and Jira—ensuring the right information is in the right place.



Synchronization Workflow

OneConnect keeps monday.com, OnePlan, and Jira synchronized in real time. Create or update work in monday.com or Jira—changes flow automatically.



Create or Update Work

Make changes in monday.com or Jira. Add items, update fields, or adjust status—no duplicate entry.



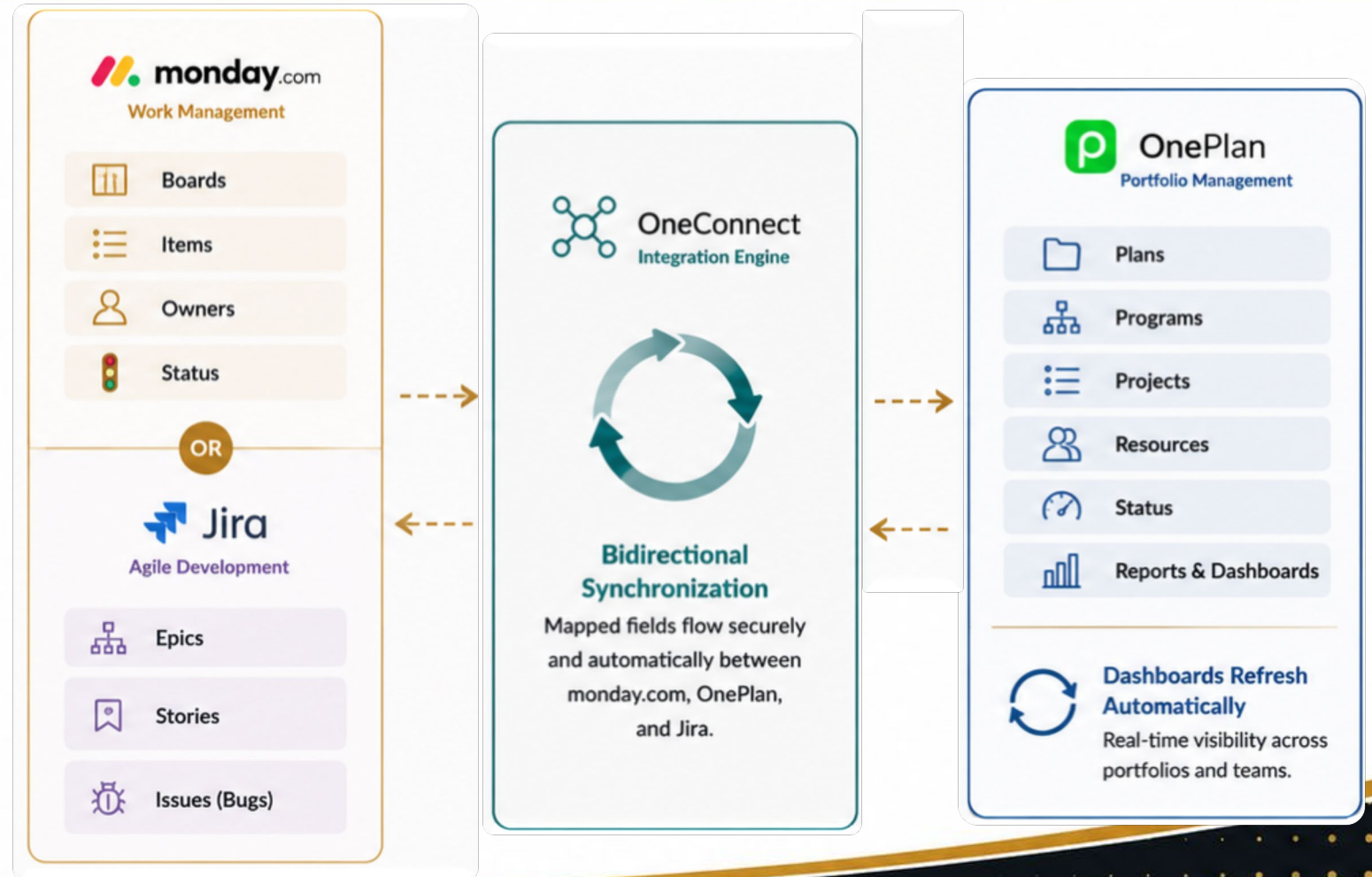
OneConnect Synchronizes Mapped Fields

OneConnect maps and synchronizes the right data between systems.



Portfolio Dashboards Refresh Automatically

OnePlan dashboards and reports update in real time with aligned data.



Executive Dashboard

Real-time portfolio insights across OnePlan, monday.com, and Jira—powered by OneConnect.



Portfolio Health
Overall health of portfolios, programs, and projects.



Budget
Plan vs. actual spend and forecast to complete.



Schedule
On-time delivery, slippage, and critical milestones.



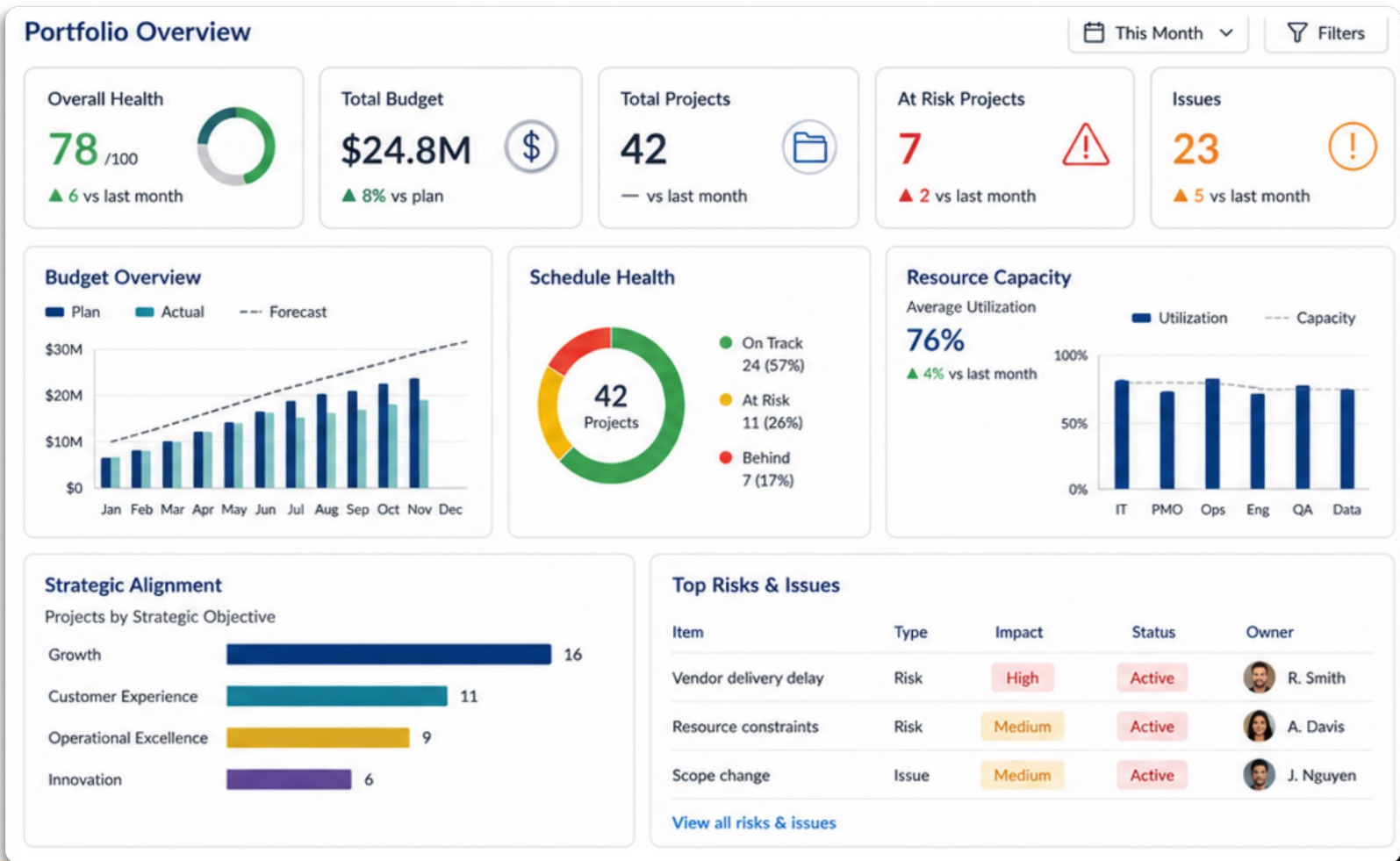
Resource Capacity
Utilization, availability, and capacity by team.



Strategic Alignment
Initiative alignment to strategic objectives and outcomes.

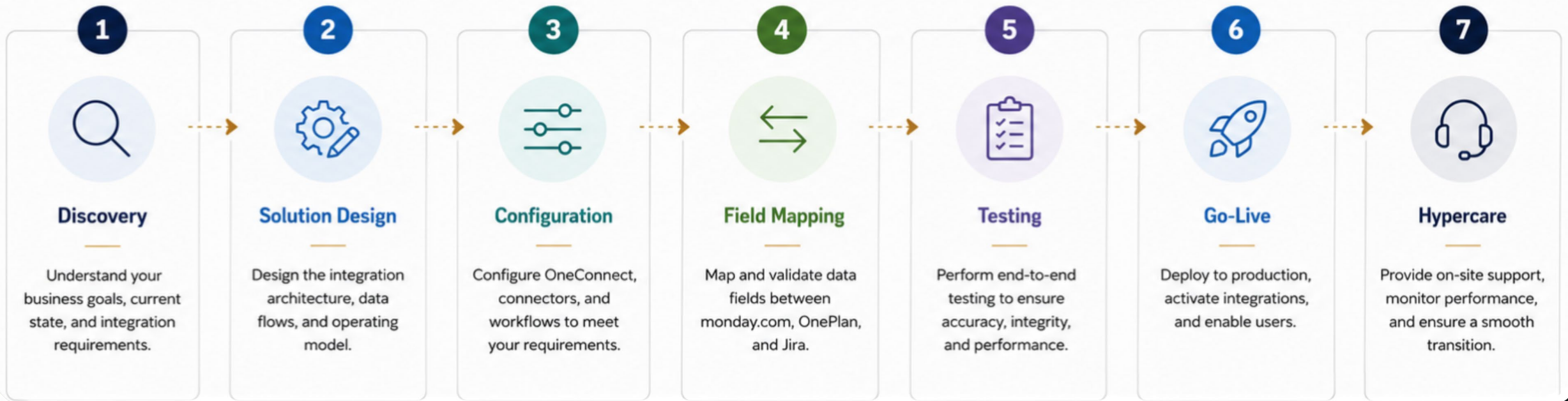


Risks & Issues
Active risks and issues with impact and mitigation.



TOLO Implementation Methodology

Our proven methodology ensures a structured, repeatable, and low-risk implementation that delivers value quickly and scales with your business.

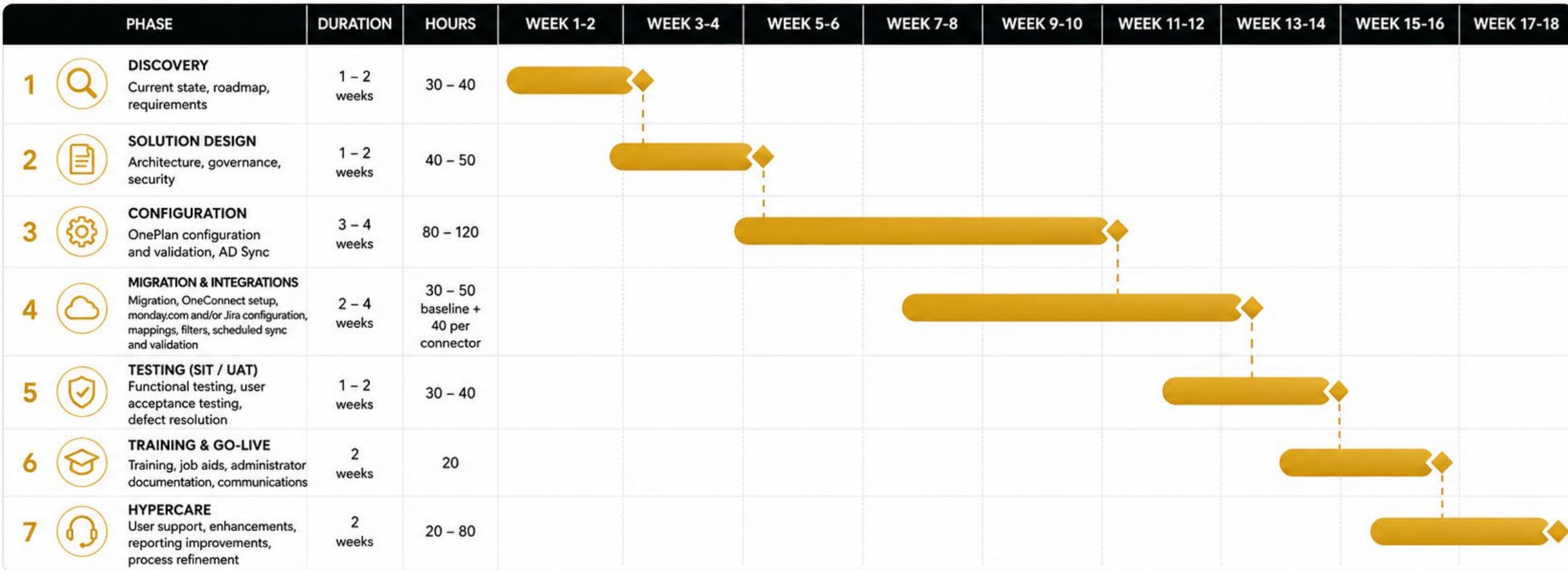


IMPLEMENTATION TIMELINE

OnePlan Implementation, Integrations & PMO Transformation



TOTAL DURATION
12 – 18 WEEKS
 250 – 400 HOURS BASELINE
 + INTEGRATION ADD-ONS



 PHASE DURATION

 PHASE MILESTONE



OUR GOAL

Deliver a scalable, user-friendly PPM solution with integrated data flows, executive visibility, and measurable outcomes.



CLIENT COLLABORATION

Transparent communication and partnership throughout every phase.



MEASURABLE OUTCOMES

Improved portfolio visibility, optimized resources, and faster strategic decision-making.



SECURE & CONNECTED

Built with enterprise security, structured integrations, and regulatory requirements in mind.

Lessons Learned & Next Steps

A strong foundation and disciplined approach drive successful integration and long-term value.



Governance First

Establish clear ownership, processes, and standards to ensure consistency and trust.



Master Data Matters

High-quality, consistent master data is the foundation for reliable insights.



Validate Mappings

Thorough validation ensures accurate synchronization and data integrity.



Iterative Rollout

Start small, learn, and expand—driving adoption and continuous improvement.



Questions & Discussion

Open dialogue drives alignment and successful outcomes.



Next Steps

1



Confirm Governance

Finalize governance model, roles, and operating cadence.

2



Finalize Data & Mappings

Complete master data review and validate all field mappings.

3



Complete Configuration

Finish OneConnect configuration, workflows, and integrations.

4



Execute Test Plan

Perform end-to-end testing and stakeholder validation.

5



Go-Live & Monitor

Launch to production, monitor performance, and optimize.