

teamwork.

Product Roadmap Q1 2022



Your hosts



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Our mission is to make client service teams
everywhere **efficient, organized, profitable**
and **happy**.

teamwork.



Founded in 2007



Founders ran an agency for 8 years



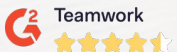
Project Management Platform



\$70 million first round investment



20,000 customers worldwide



Teamwork



PC EDITORS' CHOICE



Software Advice.



teamwork.

Agenda

- Recently Released Features
- Coming Soon
- Q2 Sneak Peek
- The Teamwork Platform
- Q & A



How to participate today

Use the Q&A section to say hello, ask anything or join the discussion

A screenshot of a web interface element titled "Questions". It features a large empty text area for input, a smaller text area below it containing the placeholder text "[Enter a question for staff]", and a "Send" button at the bottom right. The interface has a light blue border and a scroll bar on the right side.

Product Roadmap

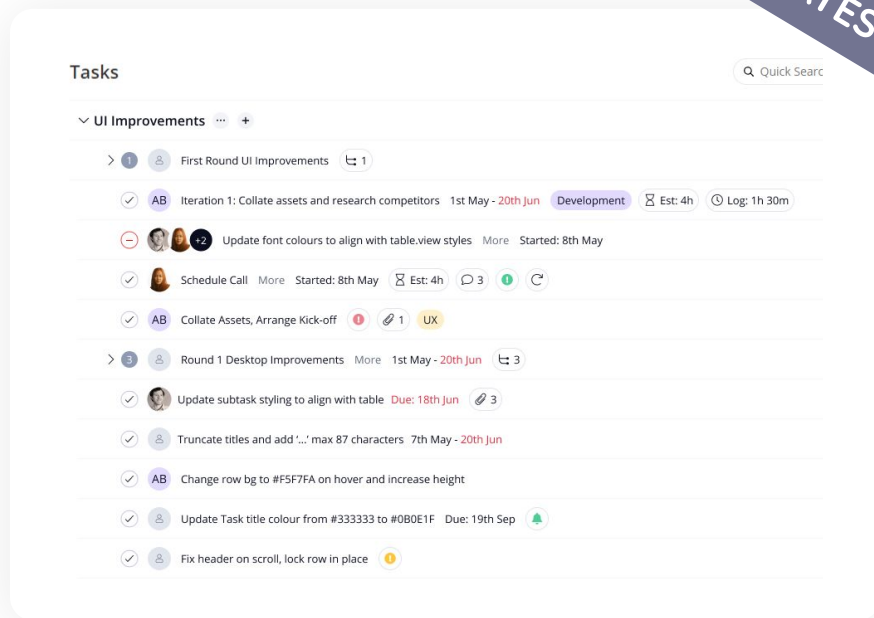
Recently Released Features

List View

View your most important task data at a glance

Overview:

- Quickly assign tasks with new user avatars
- Cleaner interface with icon and colour updates
- Understand progress at a glance with visible estimated and logged time
- Quick access to 'My Tasks' with new filter option



My Work

FEATURED UPDATES

t. Home Projects Planning Reports Everything Calendar People

+ Add Task

Q Assignee or task name

Task Name	Due Date	Priority	Estimated time	Logged time	Project	Tags	
▼ Today							
✓ Create first draft of design asset	Today	High	5h	5h 30m	Design Project Management		...
✓ 1st review to client	Today	High	3h	---	Design Project Management	Client review x	...
✓ 2nd review to client	Today	Medium	3h	2h 30m	Design Project Management	Client review x	...
✓ Deliver final asset	Today	Medium	30m	---	Design Project Management		...
✓ Implement client feedback	Today	Medium	30m	30m	Design Project Management		...
► Upcoming							
▼ Late							
✓ How to Turn Your Newsletter into a Customer Acquisition Mach...	Mar 1st	High	2h	---	Content Marketing Copy 1	Blog x TOFU x	...
✓ How Growing Agencies Can Maintain Healthy Margins as They S...	Mar 1st	High	3h	---	Content Marketing Copy 1	Blog x TOFU x	...
✓ Using Boardview for Teamwork Projects	Mar 1st	High	7h	---	Content Marketing Copy 1	Blog x BOFU x	...
✓ Creativity vs. Productivity: How to Find the Balance with Teamw...	Mar 1st	None	9h	---	Content Marketing Copy 1	Blog x MOFU x	...
✓ How to Make the Switch from Billable Hours to Subscription Bill...	Mar 1st	None	4h	---	Content Marketing Copy 1	Blog x TOFU x	...
▼ No Date							

RECENT RELEASE

Shared Table View

Ensure your team is all on the same page

Overview:

- Enable shared tables on projects to ensure the same columns are set for all your team
- Give your team the flexibility to customize their view, while always having access to a shared view
- Save time by creating the perfect table in your project Templates

Tasks : Tags Incomplete Tasks ...

① Your customised view of this table is only visible to you.
Would you like to save as the shared view for everyone in this project? X

Task Name	Assignee	Due Date	Priority	Estimated time
✓ Onboarding ... +				
✓ Video for home page		Oct 28th	None	37h
⊖ Fix the thing	AC	Oct 29th	Medium	7h
✓ Screenshot 2021-08-05 at 14.29.46 Screenshot 2021...	PC LA +1	Oct 22nd	None	---
✓ Olan test	JJA	Nov 26th	None	---
▶ Internal workshop postmortem 1 3	PC	Dec 13th, 2020	Low	---
<input type="button" value="Add task"/> 14 Completed				
✓ Phase One Development ... +				
✓ Design home page		Apr 10th	Medium	40h

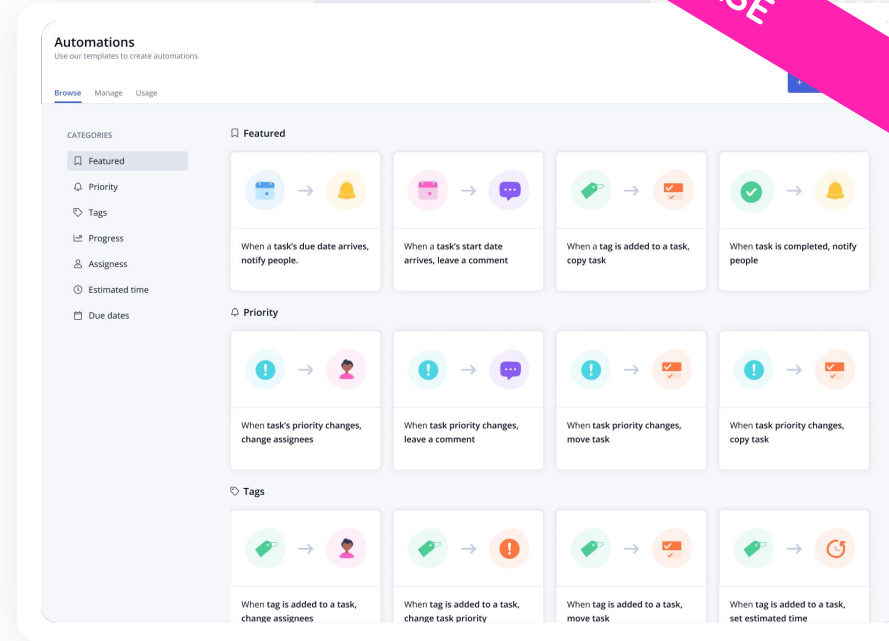
RECENT RELEASE

Automations

Automate repetitive and manual work to improve productivity

Overview:

- Build customized automation to create exactly the workflow you need
- Notify key stakeholders when tasks are overdue with new time-based triggers
- Create automations across all or multiple projects



Improved Reports

New functionality for Project Health Report, Utilization Report, and Planned vs. Actual Report

Overview:

- Custom fields, custom date ranges and additional export options.
- New look and feel for easier use

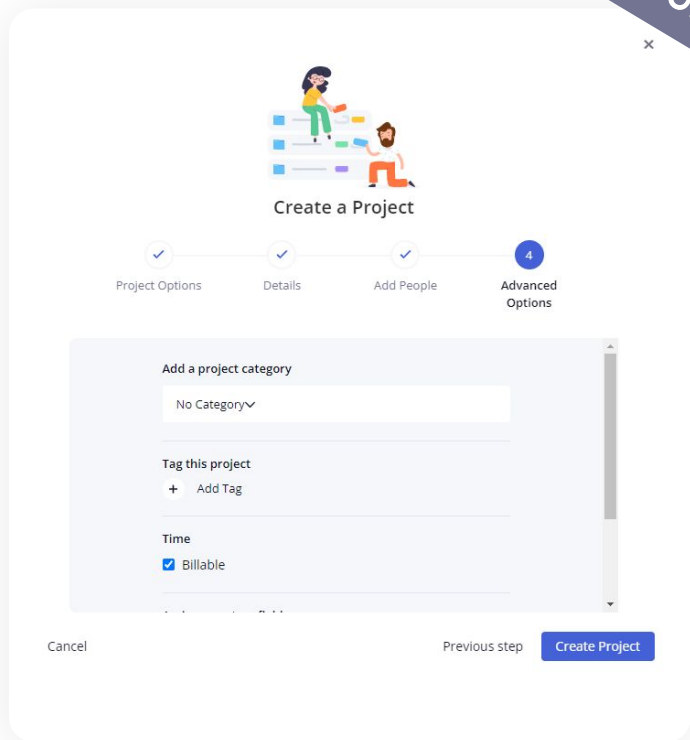
Dates	Time Left	Task Completion	Budget	Health
1st Nov 2019 - 1st Nov 2022	● 1 month over	75% 7 tasks left	12% 38 hours left	Good
1st Nov 2019 - 1st Nov 2022	● 5 days left	0% 16 tasks left	108% 12 hours over	Needs attention
1st Nov 2019 - 1st Nov 2022	● 2 months over	100% 0 tasks left	55% 5 hours left	Good
1st Nov 2019 - 1st Nov 2022		75% 7 tasks left	12% 38 hours left	Good
Set dates	—	0% 16 tasks left	—	Not set
1st Nov 2019 - 1st Nov 2022	● 27 days left	0% 16 tasks left	108% 12 hours over	Needs attention

Billable Default Setting

Ensure all billable work is captured and no revenue falls through the cracks

Overview:

- Improve the accuracy of your client billing by creating a default Billable setting
- Control which parts of the project are billable
- Set at a Project or Task List level

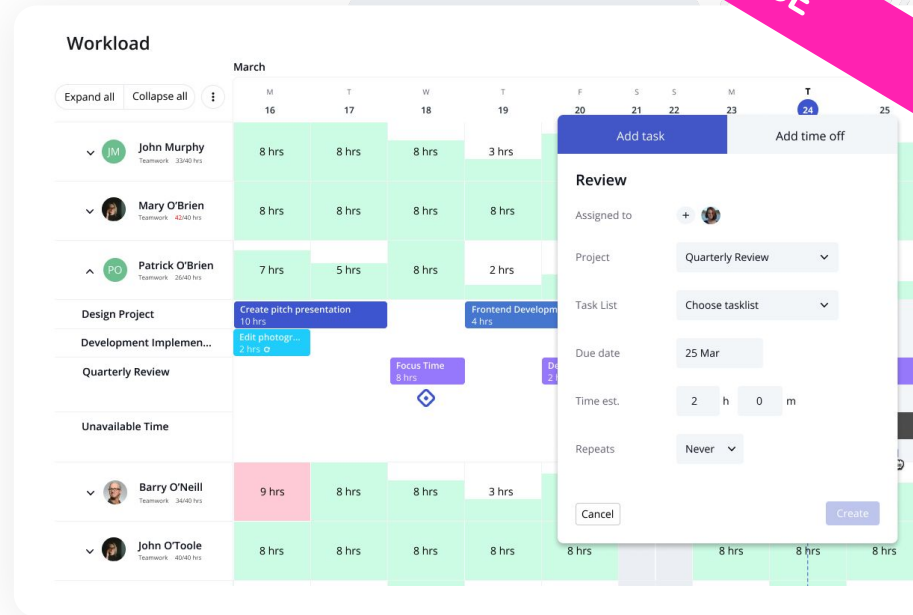


Workload Planner

Manage and understand your team's workload and capacity

Overview:

- See at a glance who is available to take on work
- Assess the capacity of your team across a timeline view
- Manage your team's unavailable time.
- Reassign tasks through dragging and dropping, or open up the Task Details to further edit tasks.

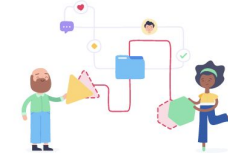


Financial Budgets

Track your project's budget in real time, to keep you on track to meet your financial goal

Overview:

- Set a monetary budget at the start of a project
- Monitor your spend against your total budget
- Improved user rates and new user cost rates
- Track billable time logged by users, and their associated billable rates



Create a new Budget

Set an hourly or fixed fee budget to track project progress.

Fixed fee USD

Budget repeats every month

Budget is based on all time

Notify me via email when budg

[+ add another notification](#)

Most Common

- USD - US Dollar
- CAD - Canadian Dollar
- EUR - Euro
- GBP - Pound Sterling

Other Currencies

- AFN - Afghani
- DZD - Algerian Dinar

Cancel

Create budget

Product Roadmap

Coming Soon

Teamwork's Fresh New Look ✨

teamwork.

+ Quick Add >

Search

My Work

Projects

Time

Inbox 28

More

Upgrade now

Add your team

Help

Chat

Mathew Ande...

> My work

Q Assignee or task name + Add task Personal Tasks

Task Name	Assignee	Due Date	Priority	Estimated time	Project
-----------	----------	----------	----------	----------------	---------

> Today

> Late

✓ Q3 - Social and email image for automations <small>Subtask</small>		27th Oct	None	—	Marketing Design
✓ Blog social and email image for Live Chat <small>Subtask</small>		24th Sep	None	—	Marketing Design
✓ Add a photo of yourself to be added to the wall in the ...		11th Jun	None	—	People Experience

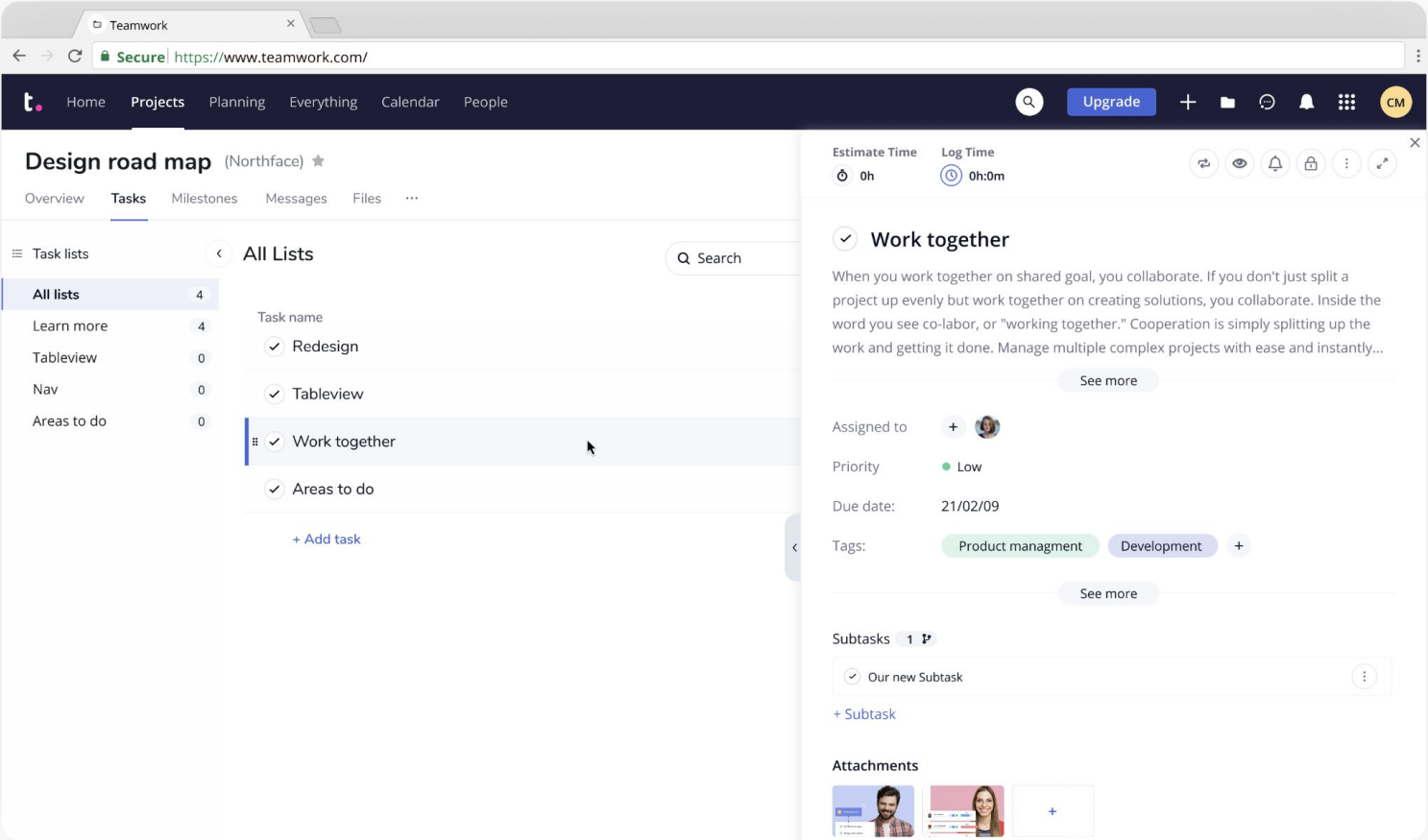
∨ Upcoming

Tasks that are scheduled soon will appear here

∨ No Date

✓ UI Defenders <small>5</small>		—	High	—	Hackathon 2021
✓ Form Submission: Empty state Quick Search fea... <small>4</small>		—	None	—	Marketing Design
✓ Custom Fields Filter Empty state Illustration		—	Low	—	Marketing Design
✓ Logo for People @ Teamwork Social media accounts		—	None	—	Marketing Design
✓ New image for Saved Filters empty state <small>3</small>		—	Low	—	Marketing Design
✓ Reminder - stock image for feature pg		—	None	—	Marketing Design

Task Details Redesign



Inbox

One place to stay up to date

Overview:

- Easily manage all of your communication in Teamwork in ONE place
- Batch process large volumes of communications

The screenshot displays the Teamwork inbox interface. On the left is a sidebar with navigation options: My work, Inbox (with a blue notification badge), My project, Activity, Dashboards, and Events. The main area is titled 'Inbox' and shows a list of notifications categorized by date: Today and Yesterday. Each notification includes a user profile picture, a timestamp, and a checkmark indicating if it's read. The most recent notification is from Andy Blair at 16:48, stating 'So in theory the content should be somewhat flexible, but we've also got a...' with a truncated subject line. Below it, a task update from Teamwork at 16:00 is highlighted, titled 'Form Submission: Andy Blair' with the description 'Q3 Feedback Form Responses - Content Team'. The right sidebar shows task details for the selected item, including 'Estimate Time' (0h), 'Assigned to' (two users), 'Priority' (Low), 'Due date' (21/02/09), 'Tags' (Development), and 'Subtasks' (Our new Subtask). At the bottom right, there is an 'Add a comment' button with the initials 'CM'.

Table View

View, sort, and edit all tasks for a project

Overview:

- Advanced filtering
- Improved subtask management
- Refreshed look and feel

The screenshot displays the 'Tasks' table view in Teamwork. The interface includes a search bar for 'Assignee or task name', an 'Add Task' button, and filters for 'Incomplete Tasks' and 'Anytime'. The table lists tasks under two categories: 'UI Improvements' and 'Task List Title'. Each task row shows a checkbox, task name, assignee, due date, priority, and a 'Filters' panel with options for 'Exclude subtasks' and 'Only tasks with unread comments'. The 'Filters' panel also shows 'Saved filters', 'Clear all', and 'Save filter' buttons.

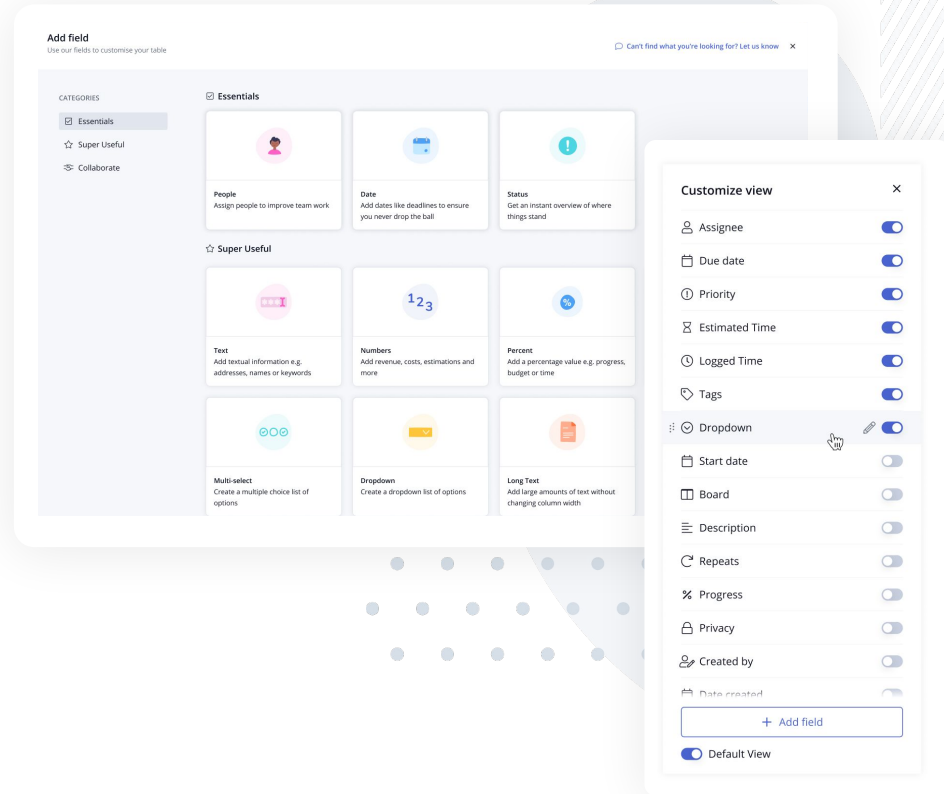
Task Name	Assignee	Due Date	Priority	Filters
UI Improvements				
> 1 First Round UI Improvements		Sep 2nd	High	
75% of tasks are this length of characters lorem ipsum		Jul 8th	None	
Update font colours to align with table view styles		May 27th	Low	
Schedule Call		---	Low	
Round 1 Desktop Improvements		---	None	
> 3 Collate Assets, Arrange Kick-off		---	None	
Truncate titles and add '...' max 87 characters		Jul 20th	Medium	
Fix header on scroll, lock row in place		---	None	
Change row bg to #F5F7FA on hover and increase height		---	None	
Leverage inline search from table view in list		---	None	
Fix header on scroll, lock row in place		Jul 20th	None	
Add a task				
Task List Title				
Task Title		---	None	
Task Title		---	None	

Custom Fields

Customize Teamwork to fit the way you work

Overview:

- Expanded custom field options
- Easier custom field creation and management
- Create exactly the customized views you need

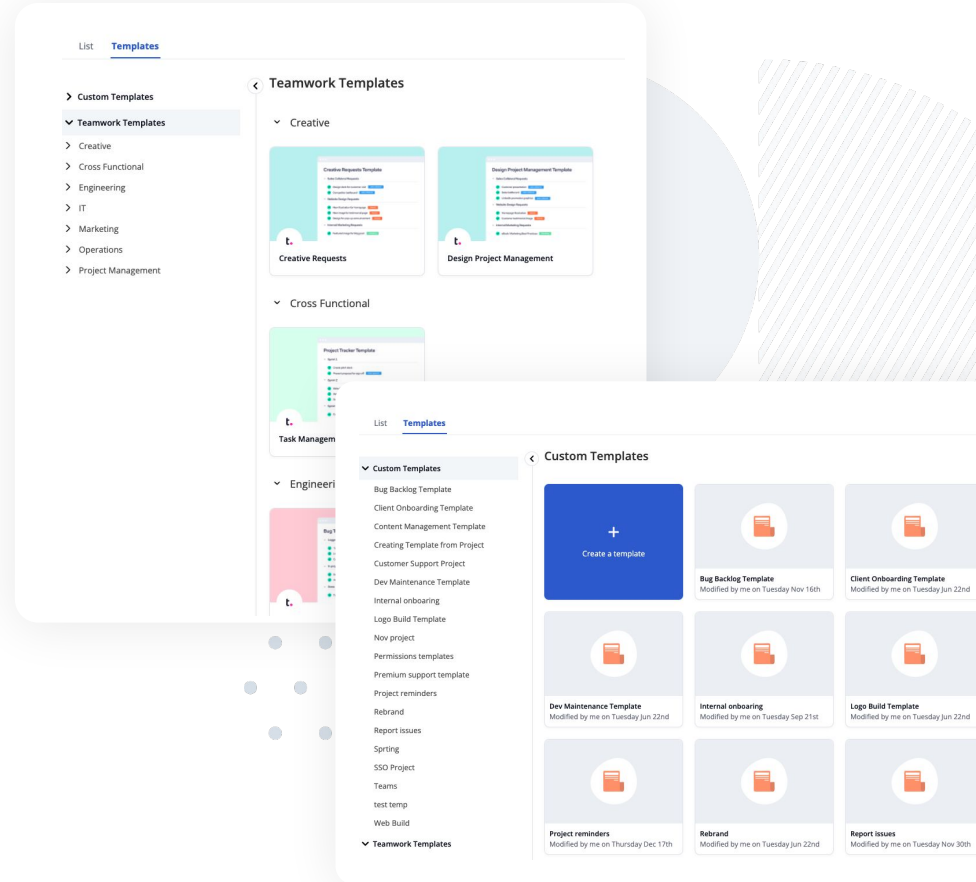


Templates

More out-of-the-box templates, saving you time setting up common projects

Overview:

- Increased number of Teamwork templates at your fingertips
- Create templates for repeatable work and save your team time
- Streamlined look and feel for faster project set up and creation

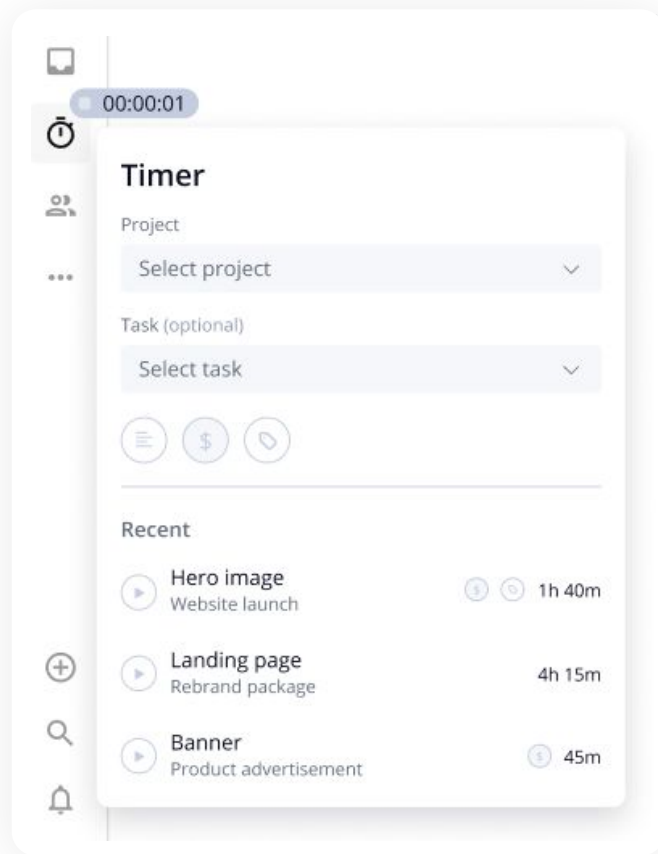


Time Tracking

Easier, frictionless time tracking

Overview:

- Easy access to the Timer
- Bulk log time at the end of the day or week in timesheets
- See how and where your employees are spending their billable or non-billable time with improved time reporting



Integrations

Next 6 Months



Improved Hubspot
Integration



Improved Slack &
Teamwork Chat
Integration



Google Calendar
Sync

HubSpot Integration

Improved integration configuration

Overview:

- Create Teamwork projects automatically when a deal stage is hit
- Select the project template these new projects should use if required
- Set up new workflows in just a few clicks

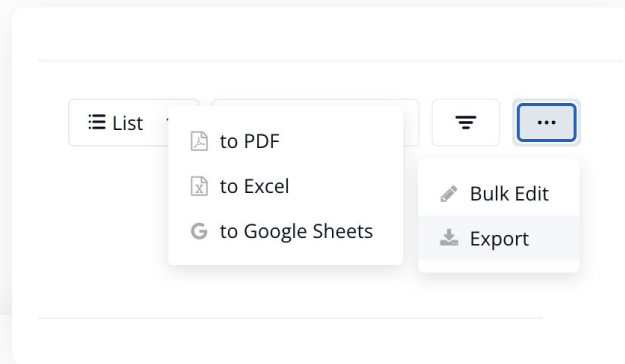
The screenshot shows the 'Create Integration' interface. At the top, there's a title 'Create Integration' with a back arrow, a toggle for 'Active', and a 'Leave feedback' link. The main area is divided into two columns: 'When' and 'Then'. The 'When' column is titled 'When' with the subtitle 'Trigger starts the execution'. It contains a 'Trigger' section with a dropdown menu set to 'Hubspot deal stage changes to'. Below this is a 'Select Deal Stage' dropdown menu with a list of options: 'Appointment', 'Qualified to buy', 'Presentation scheduled', 'Decision maker bought-In', and 'Contract sent'. The 'Then' column is titled 'Then' with the subtitle 'Do the action'. It contains an 'Action' section with a dropdown menu set to 'Create a project in Teamwork'. Below this is a 'Project template' dropdown menu set to 'Add Template'. Underneath is a 'Project name' section with a text input field 'Add Project name'. At the bottom of the 'Then' column, there's a section 'Supported fields in HubSpot:' with buttons for 'Deal Name', 'Deal Owner', 'Deal Type', 'Close Date', 'Priority', and 'more +'. At the bottom of the interface, there's a summary line: 'When a HubSpot deal stage is _____, create a project in Teamwork'. To the right of this line are 'Cancel' and 'Create' buttons.

Google Sheets Integration

Export data to Google Sheets at the click of a button

Overview:

- Option will be available within Export Menus
- Updates in near real-time
- Also coming soon to Reports



We're connecting with Google Sheets

This message will disappear once the connection is complete.

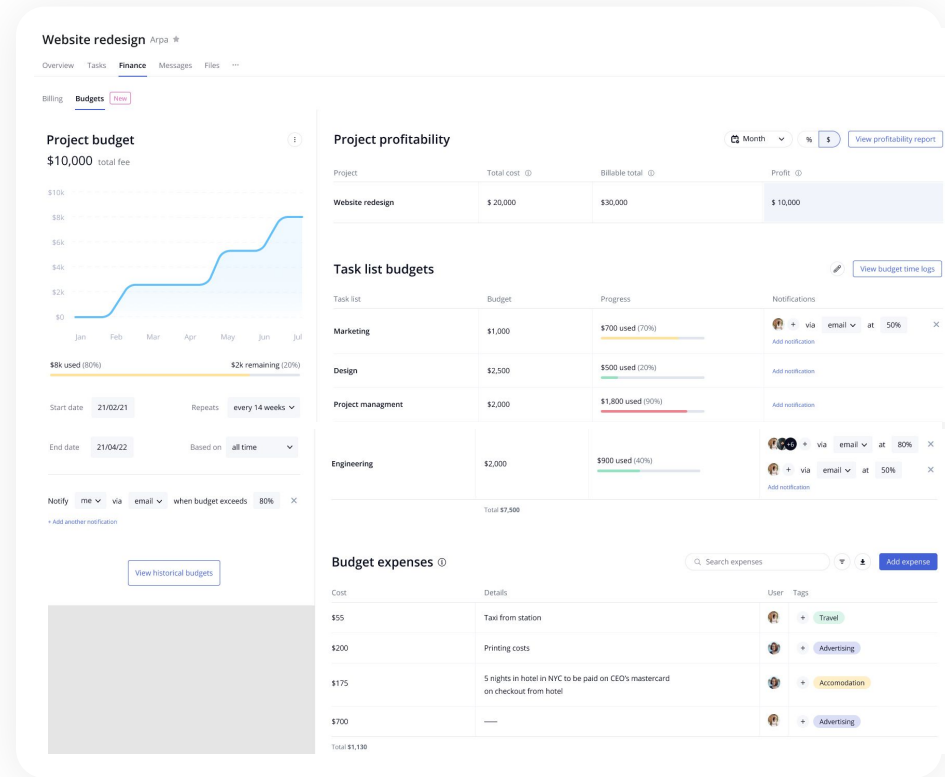
Cancel

Financial Budgets

More granular understanding of your projects' financial performance

Overview:

- Track your project budget at a granular level in the new Budgets area
- Assign sub-budgets within Task Lists for greater control
- Keep track of project-specific expenses and track their impact on your overall budget



Profitability Report

Assess the profitability of your team

Overview:

- Break down the profitability of your projects by user in the new People tab
- Drill into the specific projects each team member is working on.

The screenshot shows a 'Profitability' report for January, filtered by 'User'. The main table lists team members and their associated project costs. A dropdown menu is open for Courtney Henry, showing detailed rate information.

Projects ↓	Logged time (total) ⓘ	Logged time (total) ⓘ	Total cost ⓘ
> Cody Fisher Manager See rates			\$40,000
> Kathryn Murphy Sales Engineer See rates			
> Courtney Henry Sales Engineer See rates			
Design Project			
Design Project			
> Leslie Alexander Account Manager See rates	260h	420h	\$26,000

Courtney Henry		
Cost Rate	\$200	\$7,600
Default Billable Rate	\$250	
Design Project Rate	\$180	\$2,350
Front End Project Rate	\$180	
Front End Project Rate with two lines	\$180	\$2,350
ACME FE Rate	\$230	\$2,350

Product Roadmap

Q2

My Work

Increased flexibility for planning your days and weeks

Overview:

- View your daily calendar events together with your tasks to more effectively plan your day.
- More control over how you view your tasks with custom groupings and priorities

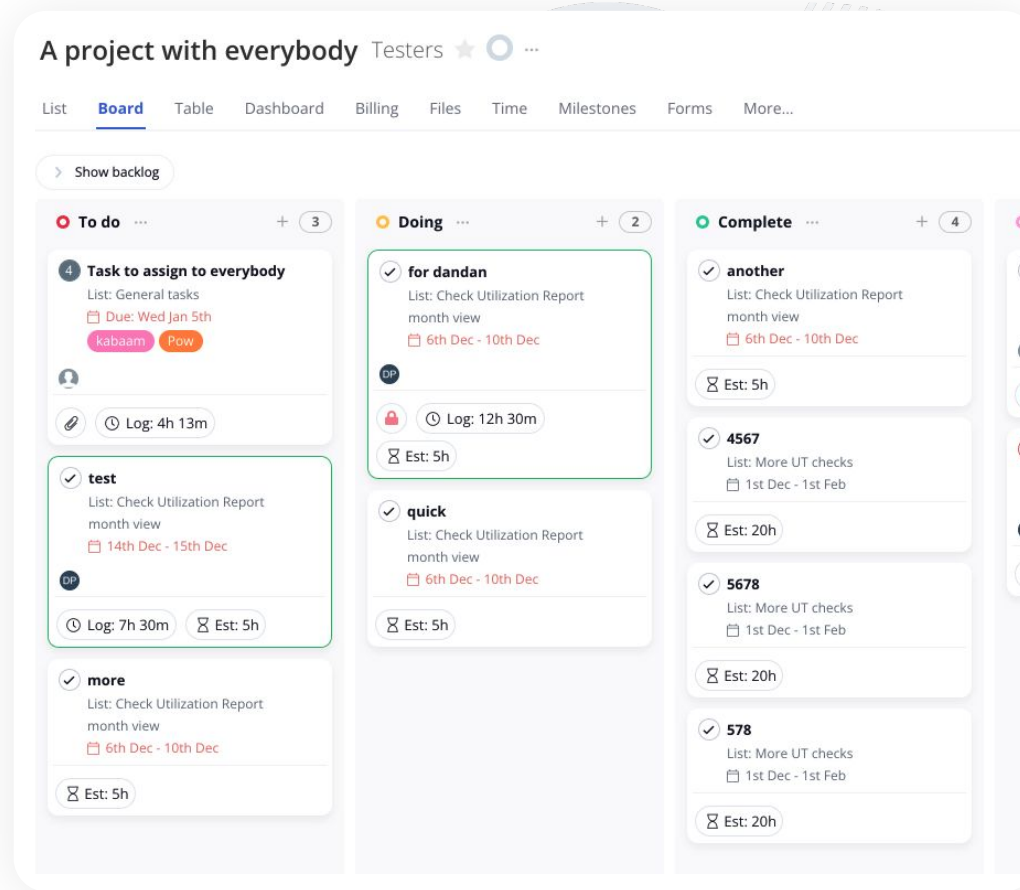
Task Name	Assignee	Due Date	Priority	Estimated time
Today				
Release December blog post!	[Avatar]	Today	Medium	3h 30m
Get sign off from head of marketing	[Avatar]	Today	Low	30m
Review blog graphics	[Avatar]	Today	Low	4h
Late				
Upcoming				
Plan newsletter calendar for 2022	[Avatar]	Oct 24th, 2023	High	—
Schedule calendar event for initial call with PayPal	[Avatar]	Oct 24th, 2023	None	4h
Schedule Call	[Avatar]	Nov 18th, 2023	Medium	5h
Review Q1 budget	[Avatar]	Oct 24th, 2023	Low	45m
Chase sign off on SEO project scope	[Avatar]	Oct 24th, 2023	None	—
Check in on project of budget sign off	[Avatar]	Oct 26th, 2023	High	1h 30m
Collect graphics	[Avatar]	Oct 24th, 2023	Low	—
Attain phone number	[Avatar]	Oct 28th, 2023	Low	2h
Add webinar to calendar!	[Avatar]	Jul 15th, 2023	Medium	—

Board View

New view for better Agile project management

Overview:

- Shared Boards across Projects
- Improved automated workflows
- Integrated custom fields for Story Points



Custom Reporting

Create the exact reports you need for better insights

Overview:

- Understand your team's unique productivity
- Demonstrate that your work is on track based on the metrics you care most about
- Track progress and quickly identify at-risk projects
- Keep clients updated on the progress of their projects

Name report

Custom Utilization Report

Based on

Users

Columns

Estimated Utilization ✓

Actual Utilization ✓

Billable Utilization ✓

Non-billable Utilization ✓

Available Time ✓

Unavailable Time

Logged Time ✓










Billable Time ✓

Non-billable Time ✓

+ Add column

Preview

Custom Utilization Report

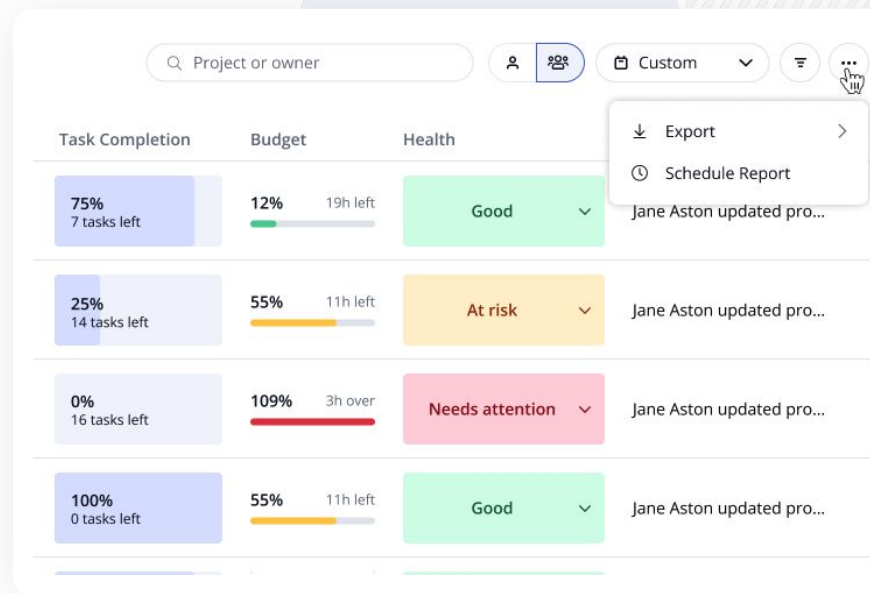
User	Estimated Utilization	Actual Utilization	Billable Utilization	Non-billable Utilization
 Cameron J. UI Designer	100%	75%	125%	50%
 Leslie Alexander UX Design Intern	50%	75%	100%	50%
 Guy Hawkins Product Designer	0%	50%	25%	0%
 Esther Howard Senior UX Designer	75%	125%	100%	125%
 Jenny Wilson UI/UX Designer	75%	25%	75%	75%
 Wade Warren Senior Product Designer	99%	125%	125%	125%
 Jane Cooper UX Designer	75%	100%	50%	100%
 Brooklyn Simmons Visual Designer	100%	25%	100%	100%
 Jane Cooper UI Designer	50%	100%	0%	0%

Scheduled Reporting

Automate the delivery of your Teamwork reports to whomever you like

Overview:

- Directly deliver your reports to selected assignees' email inboxes
- Have full control over the date, time, and frequency of delivery
- Choose your report format
- Save time on your daily, weekly, and monthly reporting needs.



The screenshot displays a dashboard with a search bar at the top containing 'Project or owner'. Below the search bar are icons for user selection, a 'Custom' filter dropdown, and a menu icon. A dropdown menu is open, showing options for 'Export' and 'Schedule Report'. The main content area is a table with columns for 'Task Completion', 'Budget', and 'Health'. Each row represents a project with its respective metrics and a 'Jane Aston updated pro...' notification.

Task Completion	Budget	Health	
75% 7 tasks left	12% 19h left	Good	Jane Aston updated pro...
25% 14 tasks left	55% 11h left	At risk	Jane Aston updated pro...
0% 16 tasks left	109% 3h over	Needs attention	Jane Aston updated pro...
100% 0 tasks left	55% 11h left	Good	Jane Aston updated pro...

Product Roadmap

The Teamwork Platform

Teamwork Desk

A help desk to centralize your client communication

- One inbox for all client communication
- Use team inboxes for full transparency
- Access complete client interaction history
- Save time with workflows and ticket automations
- Integrated time tracking between Desk and Teamwork

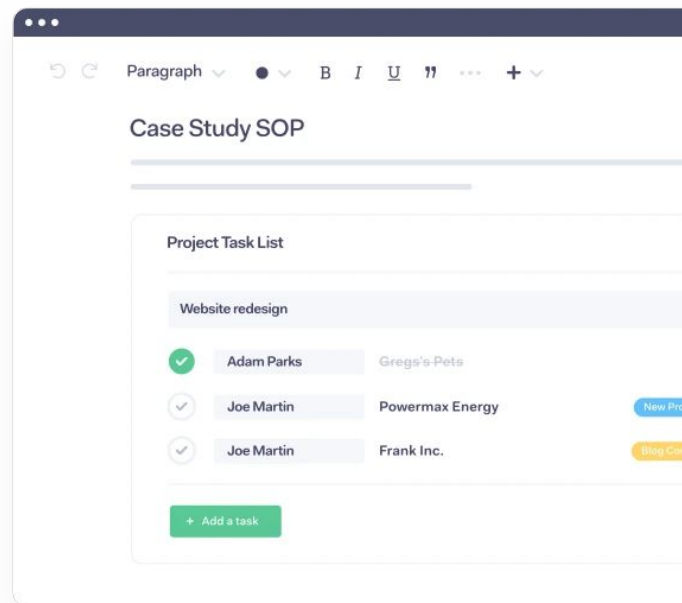
Want to give it a try? Contact desk@teamwork.com

Teamwork Spaces

Organize your team and company content with collaborative document editing

- Single source of truth for your docs, SOPs, specs, etc.
- Seamless integration with Teamwork Tasks
- Transform documents with interactive widgets
- Try now for free as an add-on

Want to give it a try? Contact spaces@teamwork.com



Product Roadmap

Q&A

teamwork.

Thank
You!