teamwork.

Product Roadmap Q1 2022

Your hosts

Mossy O'Mahony

Head of Product

Dee Dee de Kenessey

Head of Product Marketing

Robin O'Sullivan

Teamwork Product Manager

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

Founded in 2007

Founders ran an agency for 8 years

Project Management Platform

$70 million first round investment

20,000 customers worldwide

Teamwork

EDITORS' CHOICE

Capterra

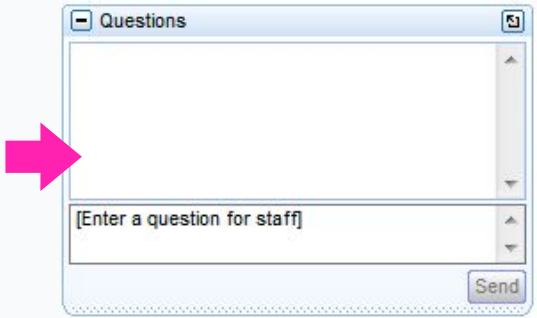
Software Advice.

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



Product Roadmap

Recently Released Features

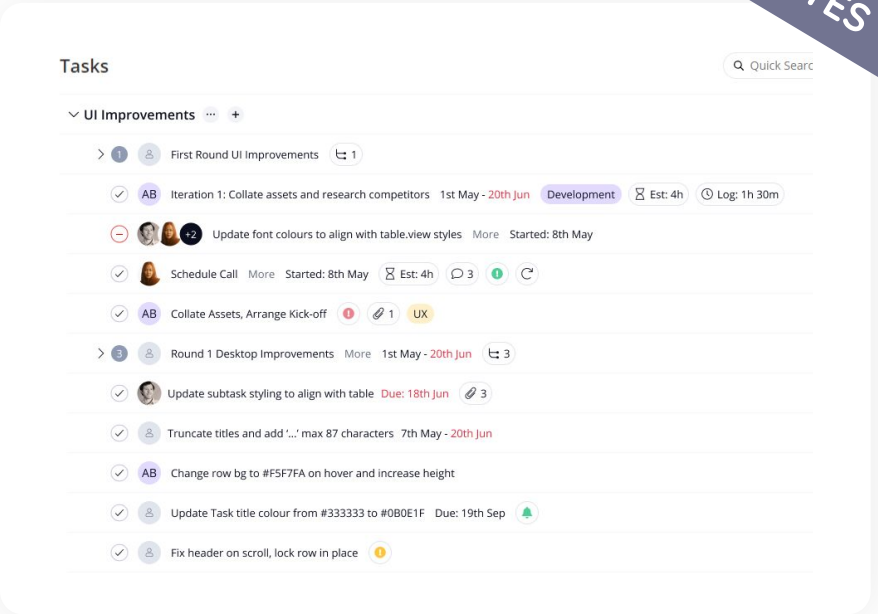
FEATURED UPDATES

List View

View your most important task data at a glance

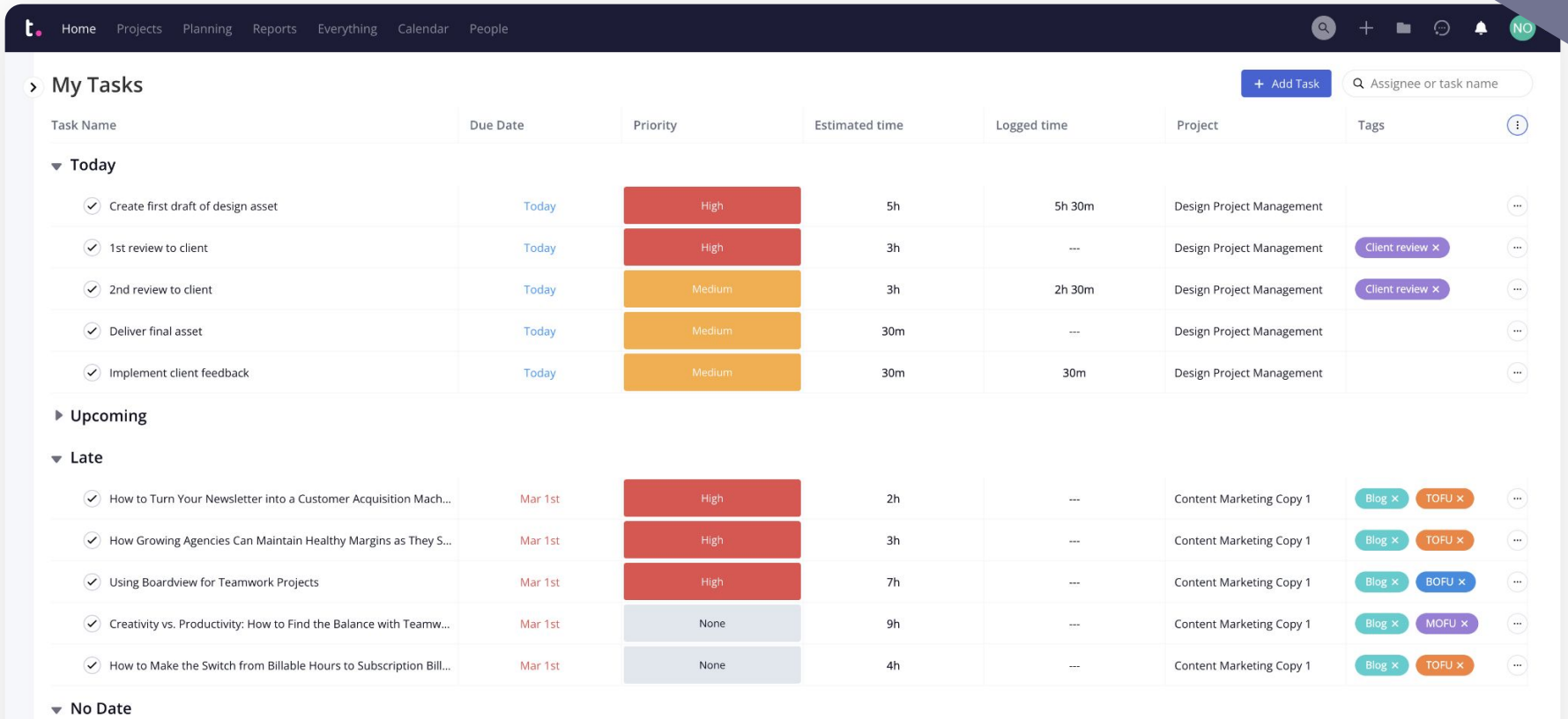
Overview:

- 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



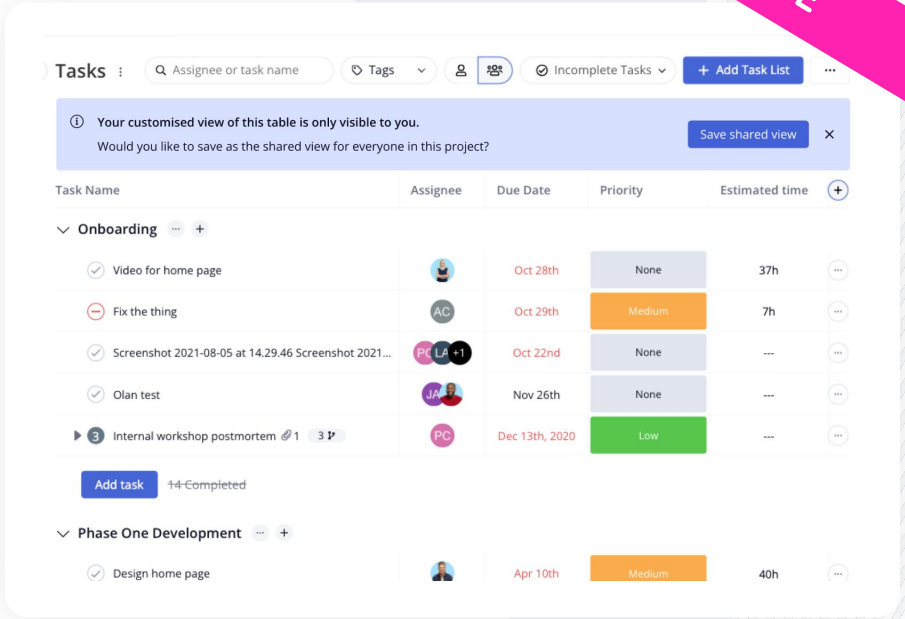
RECENT RELEASE

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



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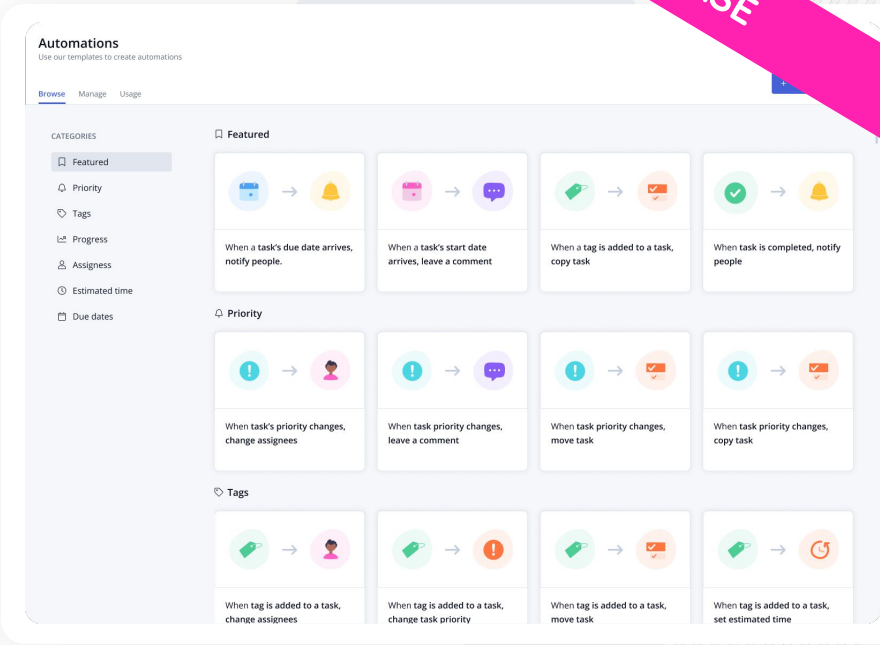
Automations

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



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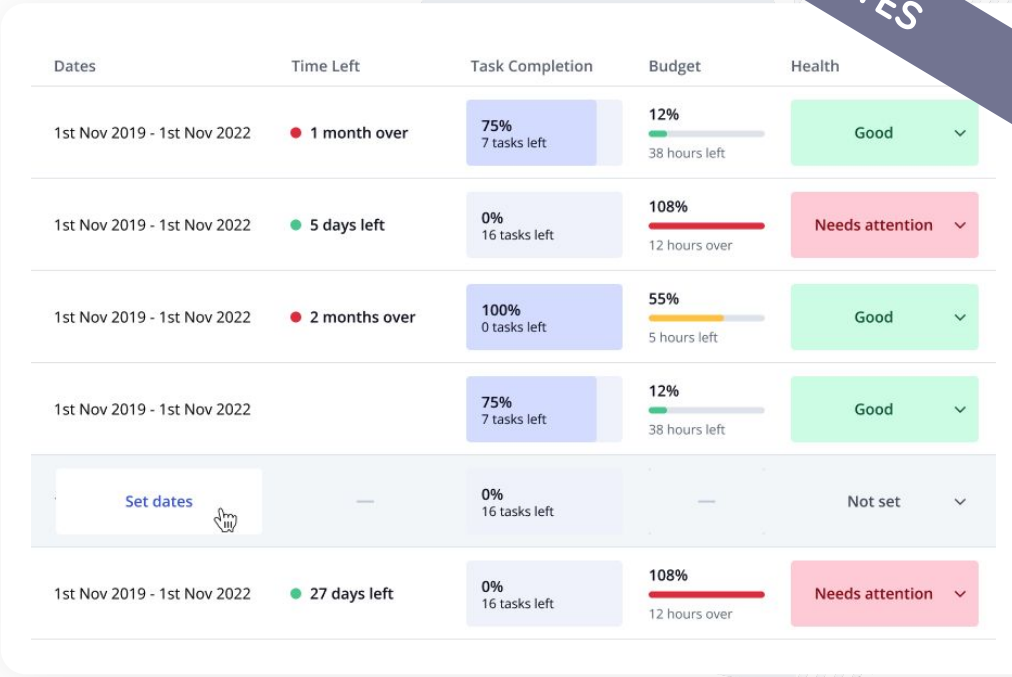
FEATURED UPDATES

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



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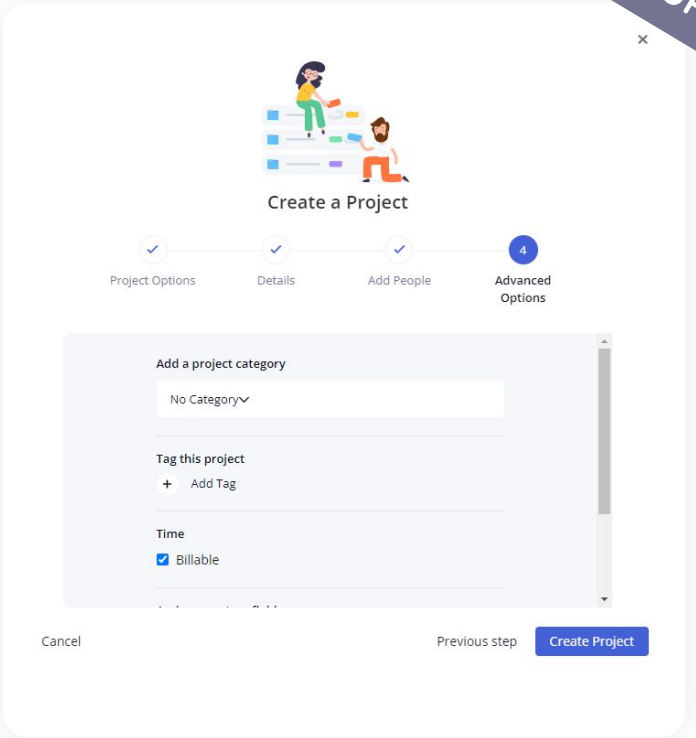
FEATURED UPDATES

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



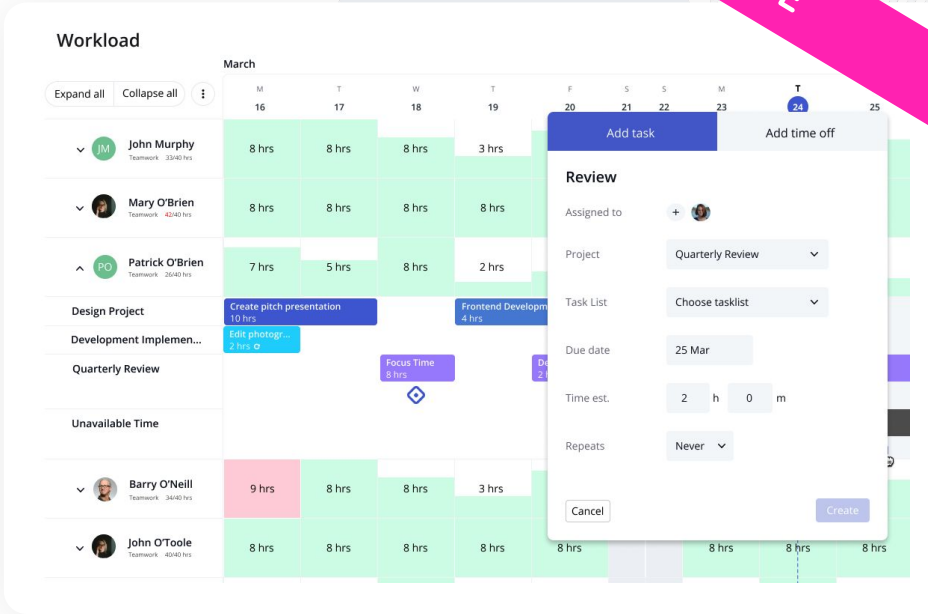
RECENT RELEASE

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.



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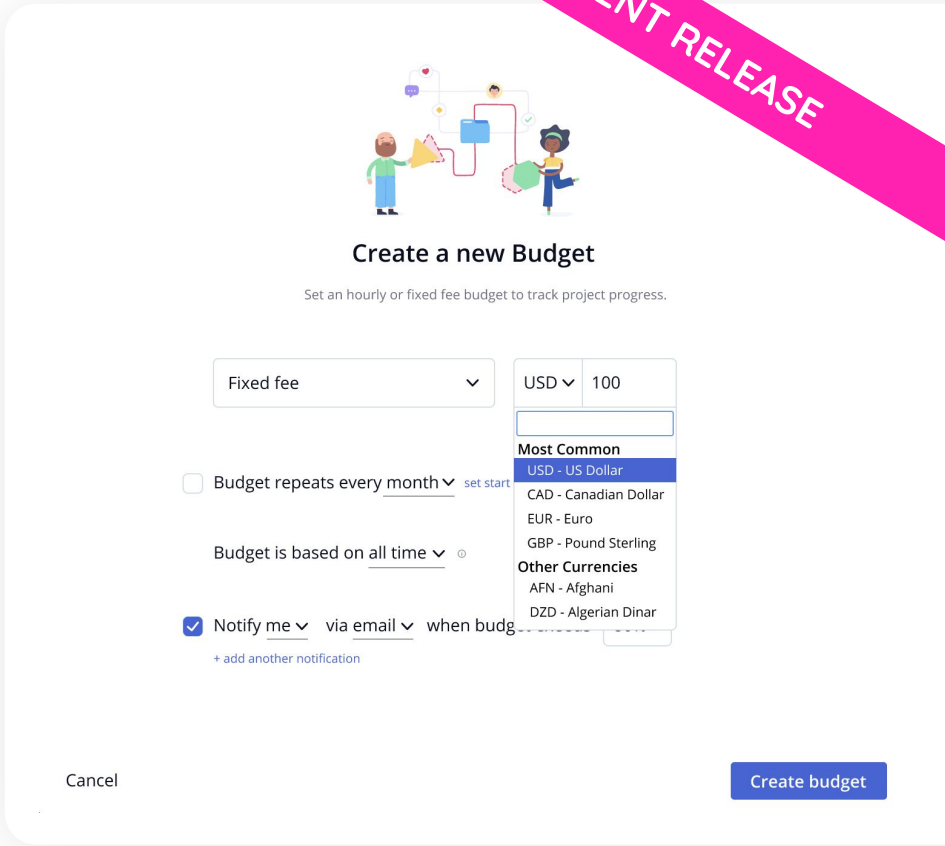
Financial Budgets

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

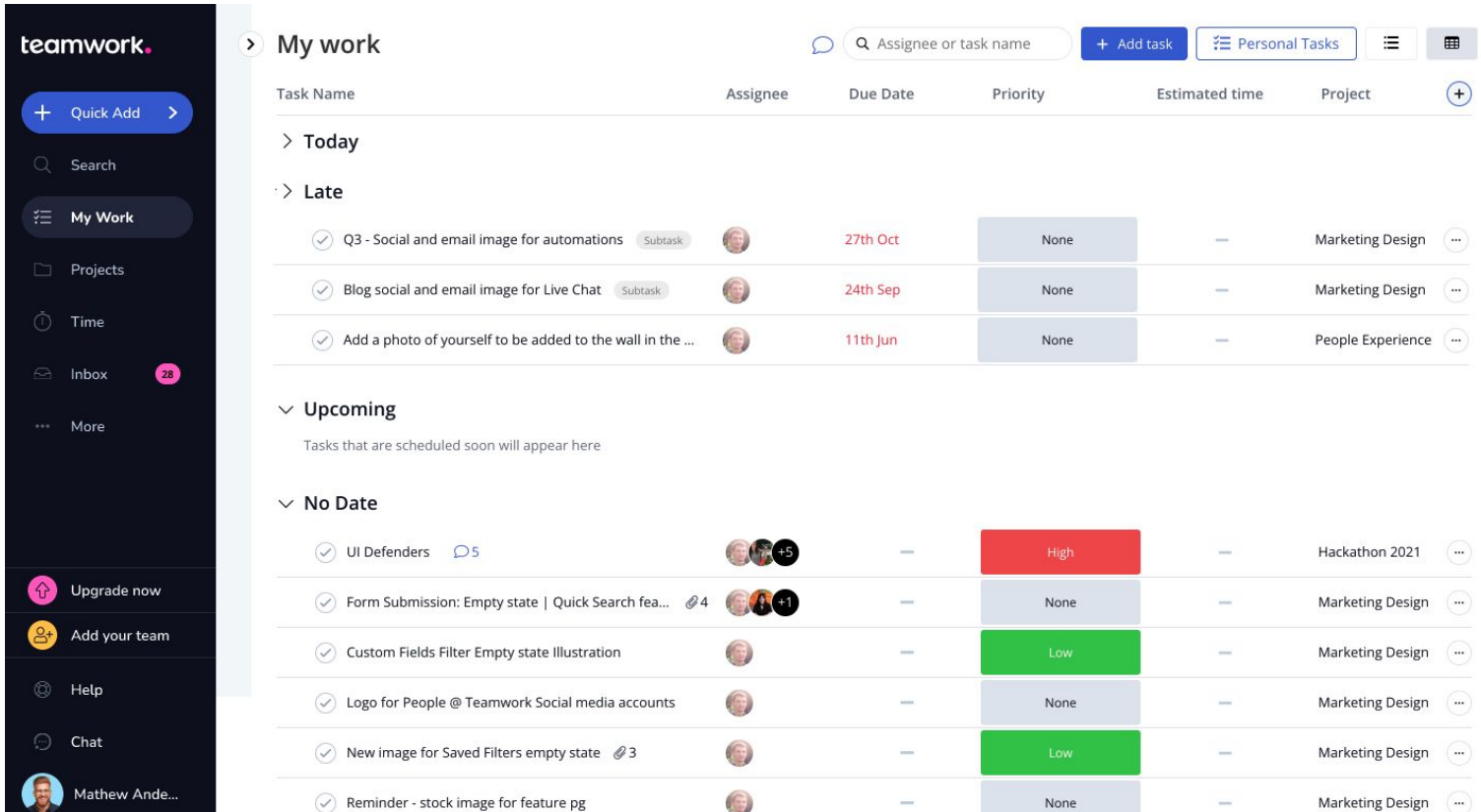


Product Roadmap

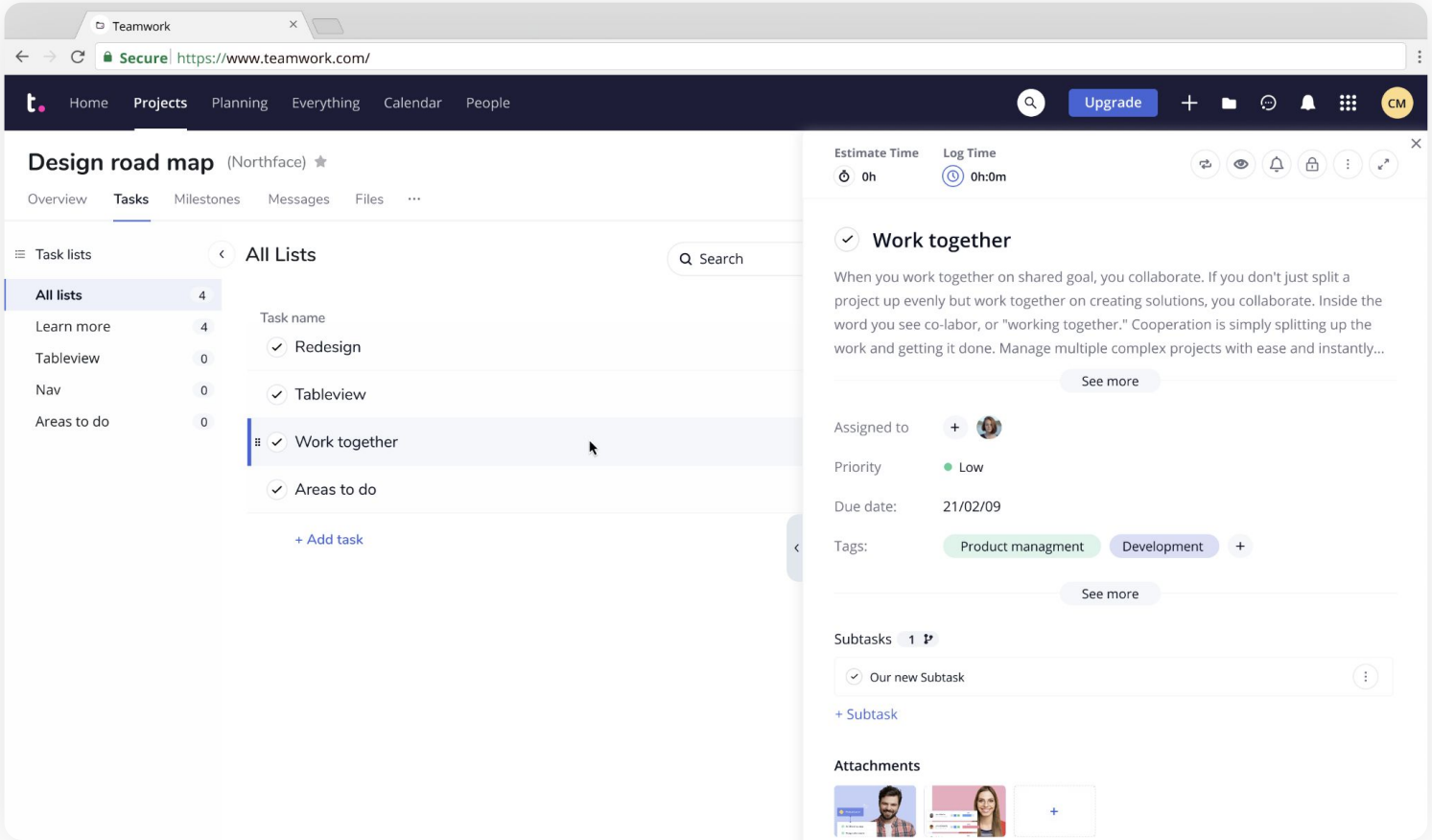
Coming Soon

CONFIDENTIAL TOP SECRET CONFIDENTIAL

✨ Teamwork's Fresh New Look ✨



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

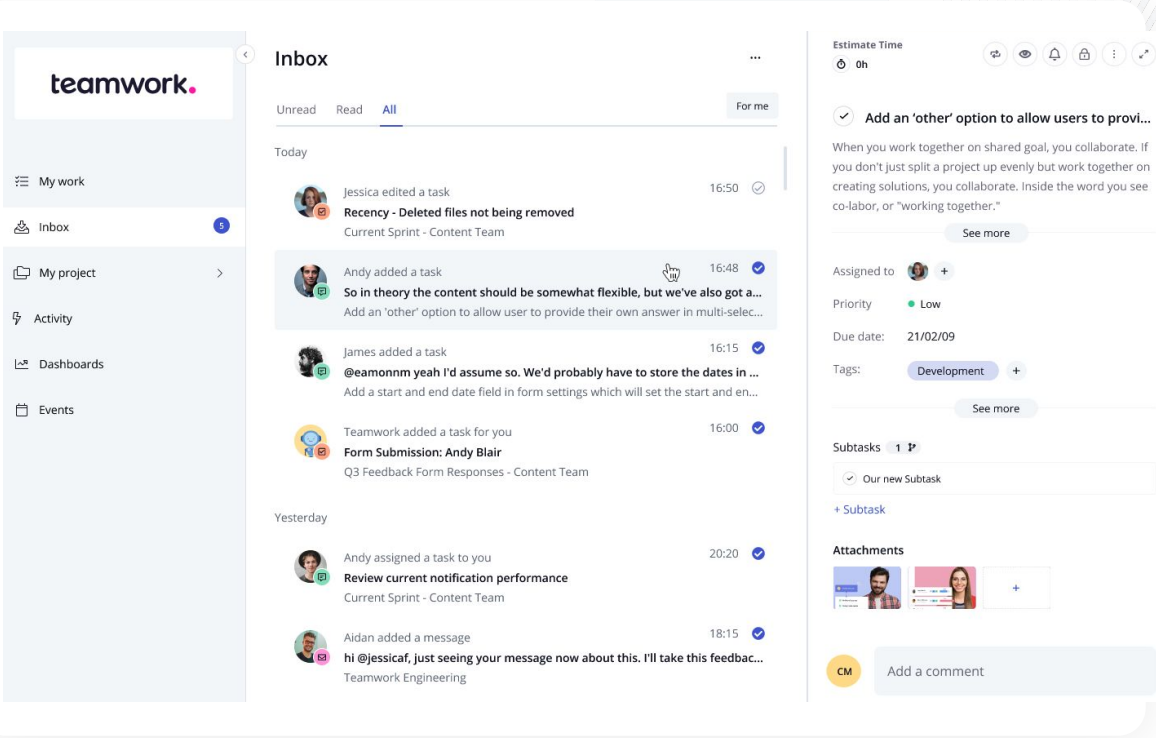
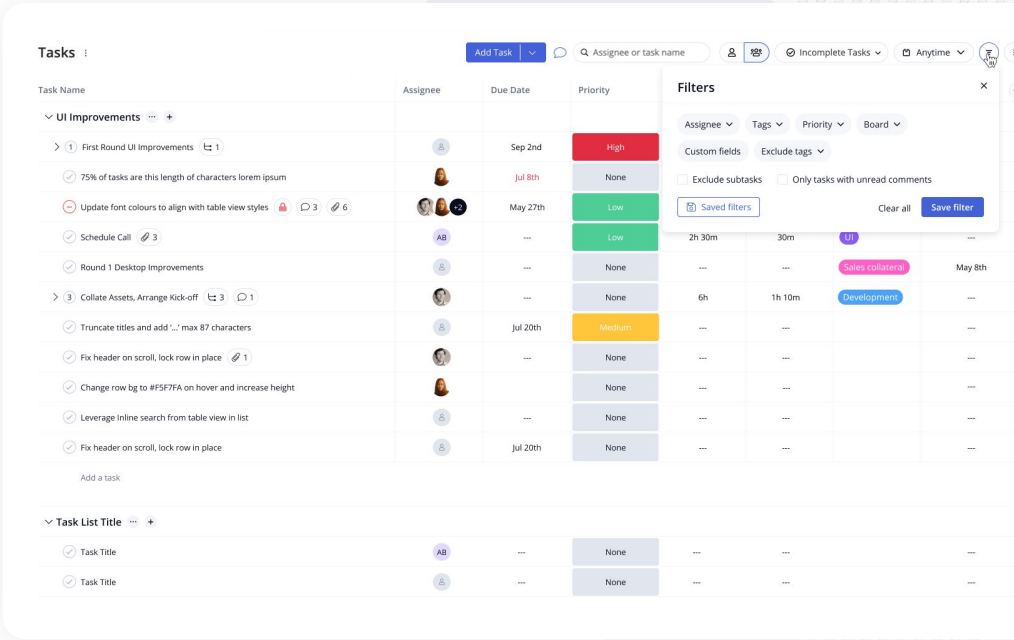


Table View

View, sort, and edit all tasks for a project

Overview:

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



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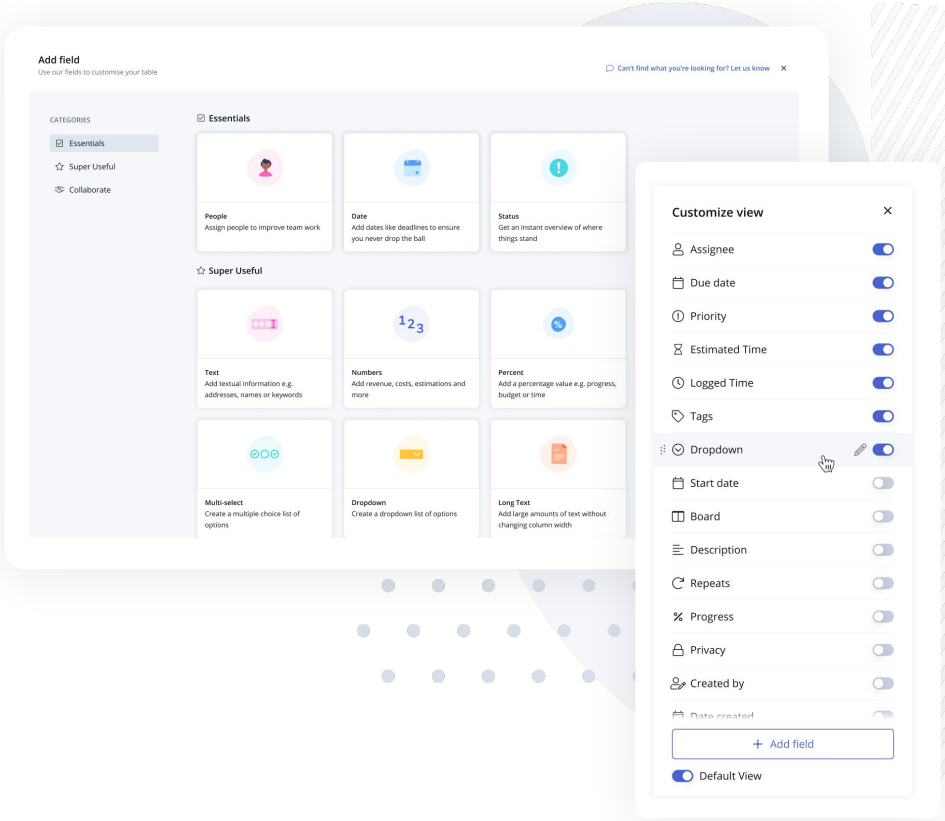
Custom Fields

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



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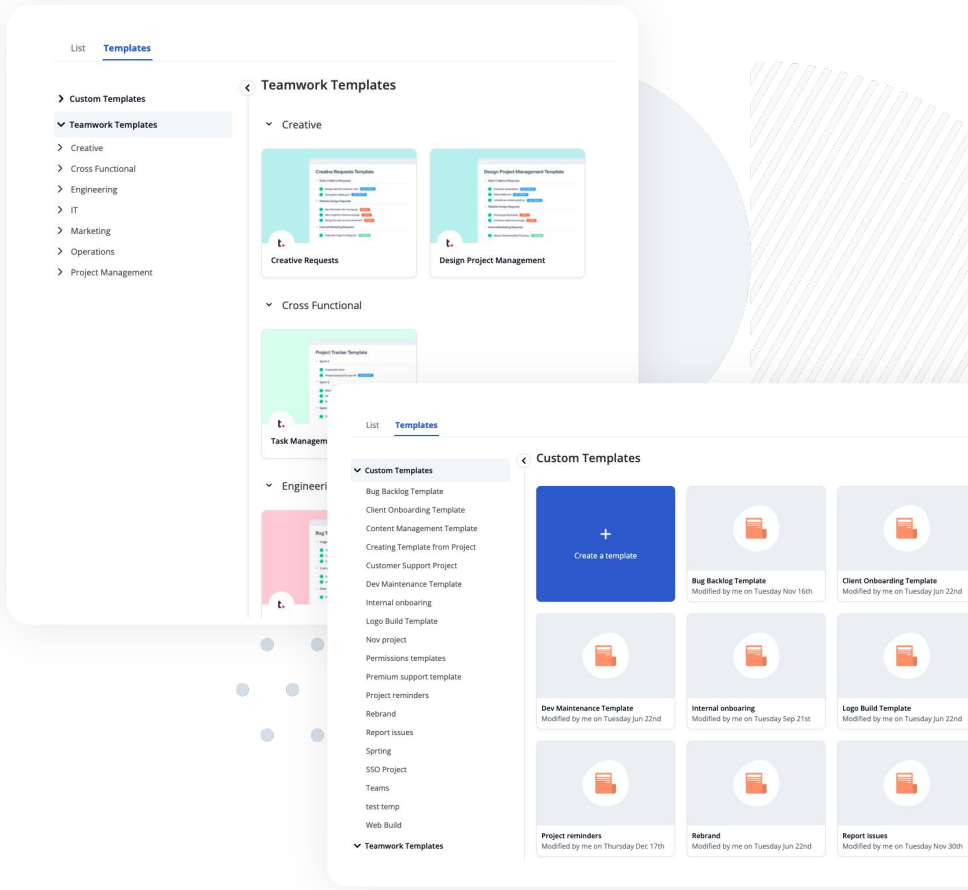
Templates

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



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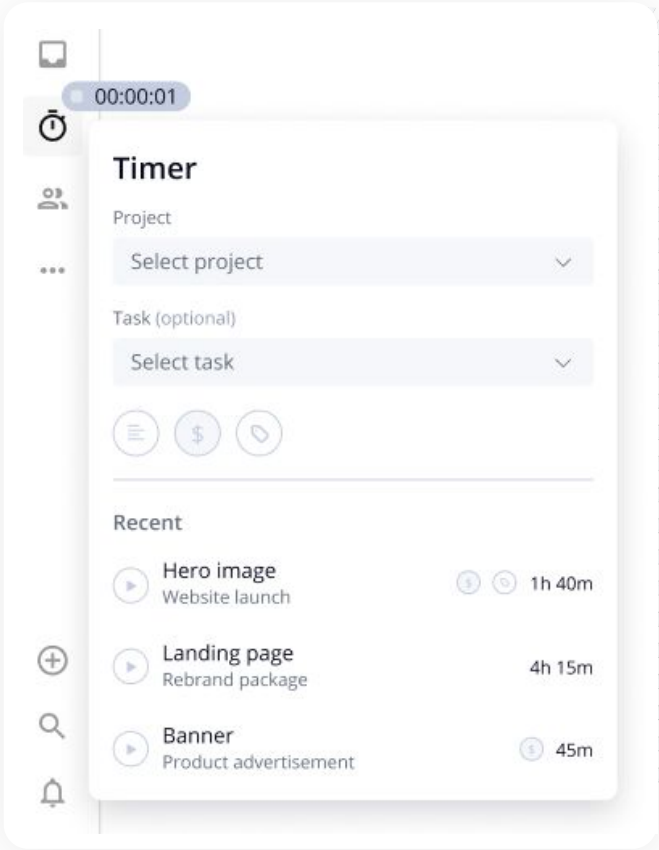
Time Tracking

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

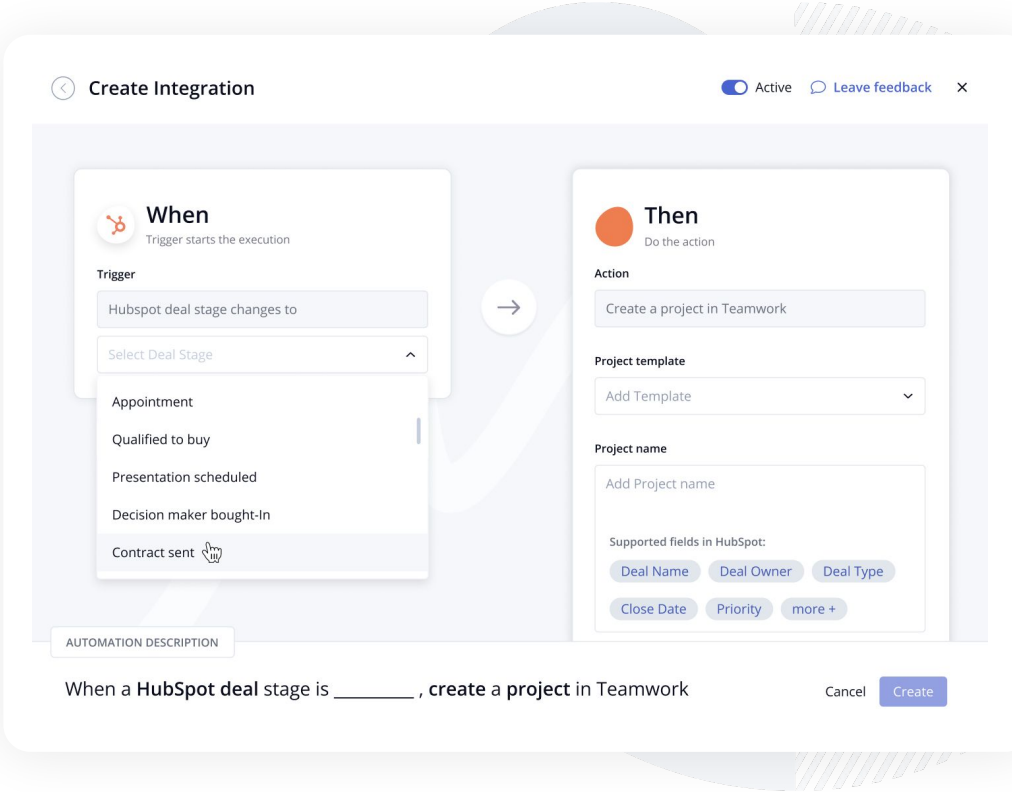
Google Calendar Sync

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



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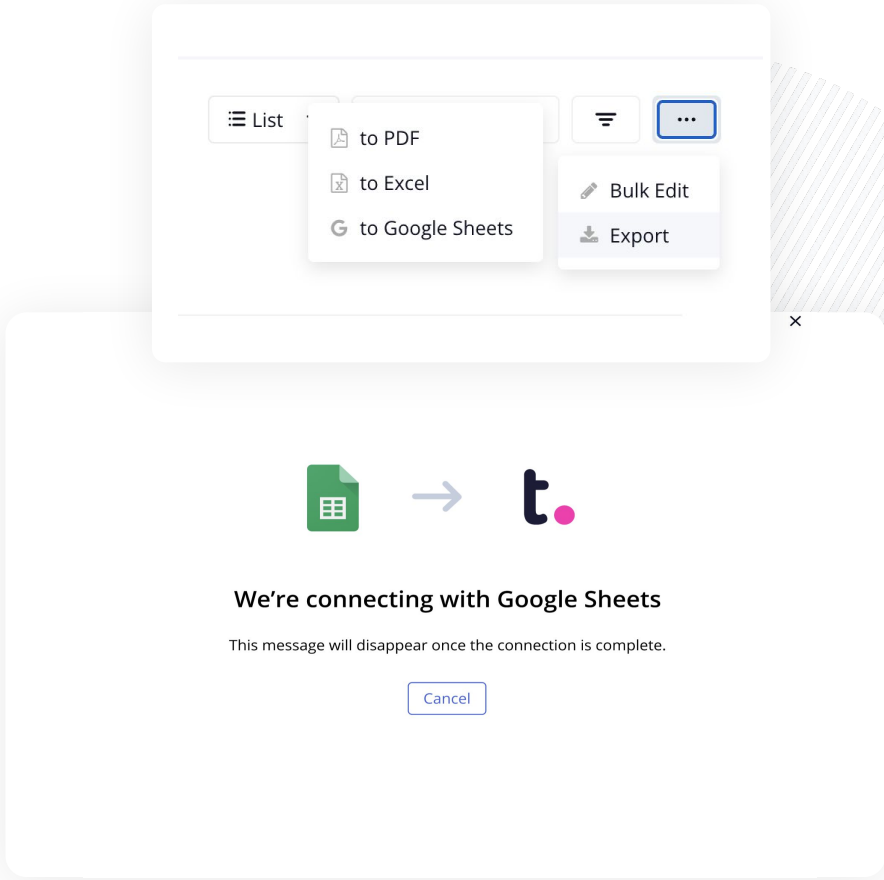
Google Sheets Integration

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



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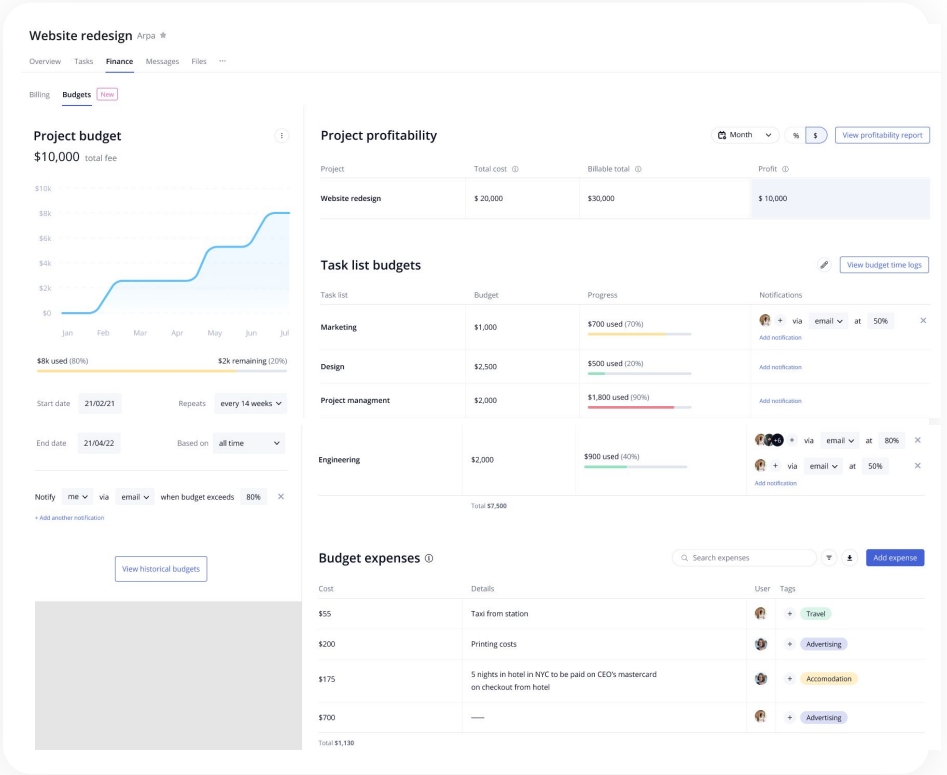
Financial Budgets

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

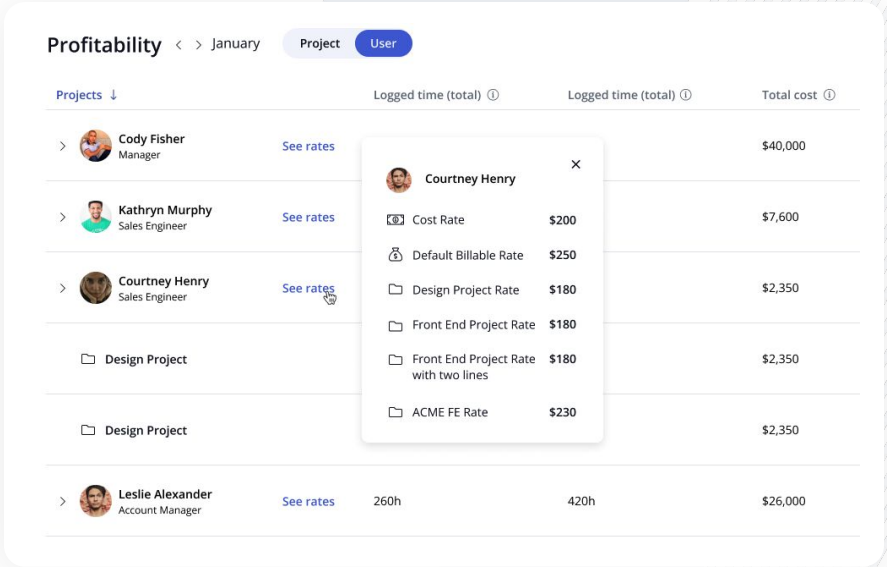


Profitability Report

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 is working on.



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Product Roadmap

Q2

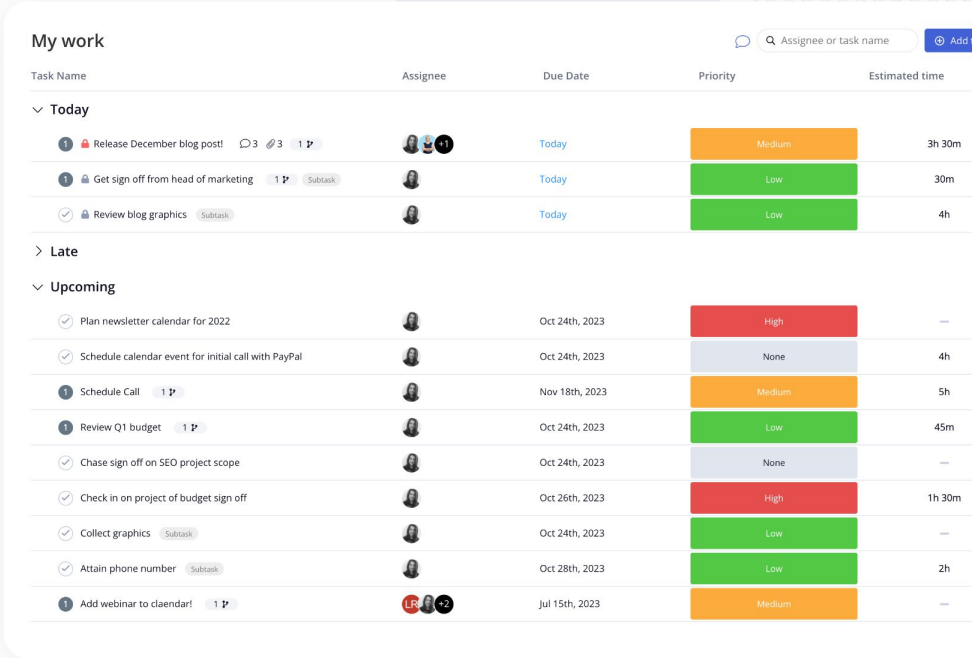
CONFIDENTIAL TOP SECRET CONFIDENTIAL

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



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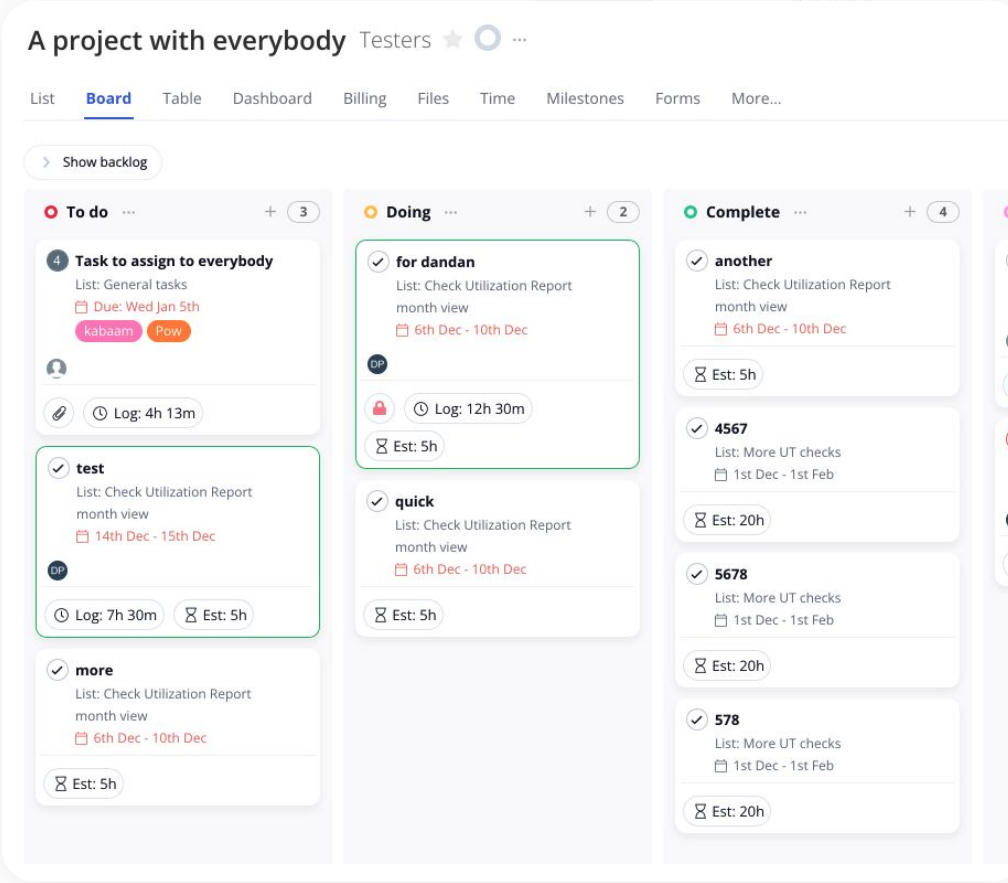
Board View

New view for better Agile project management

Overview:

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



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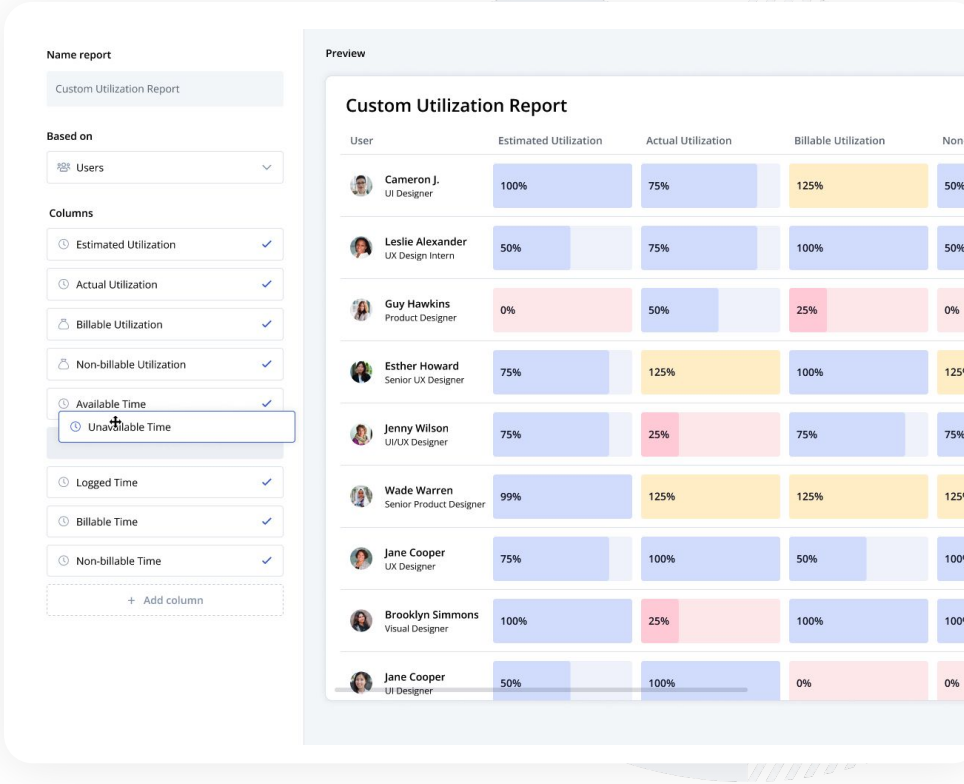
Custom Reporting

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



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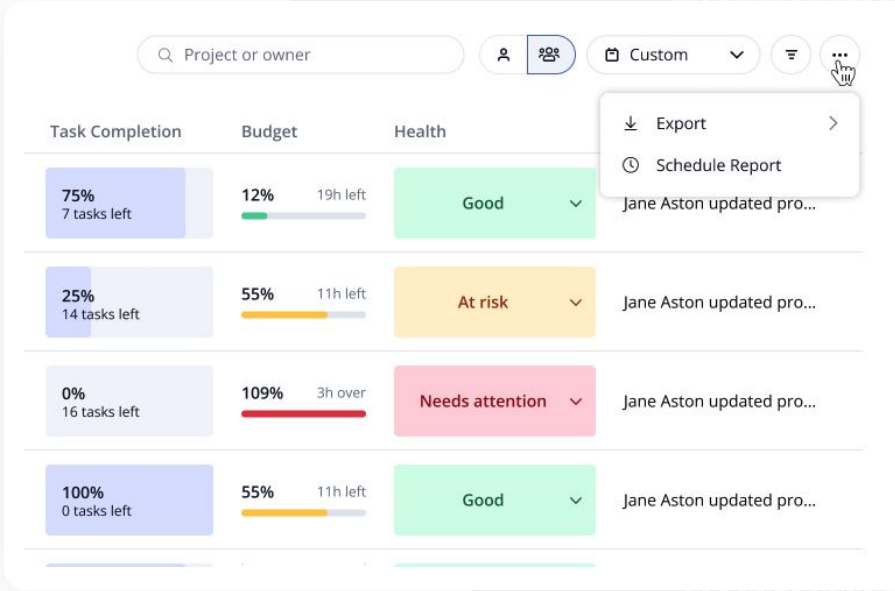
Scheduled Reporting

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.



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The Teamwork Platform

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Teamwork Desk

A help desk to centralize your client communication

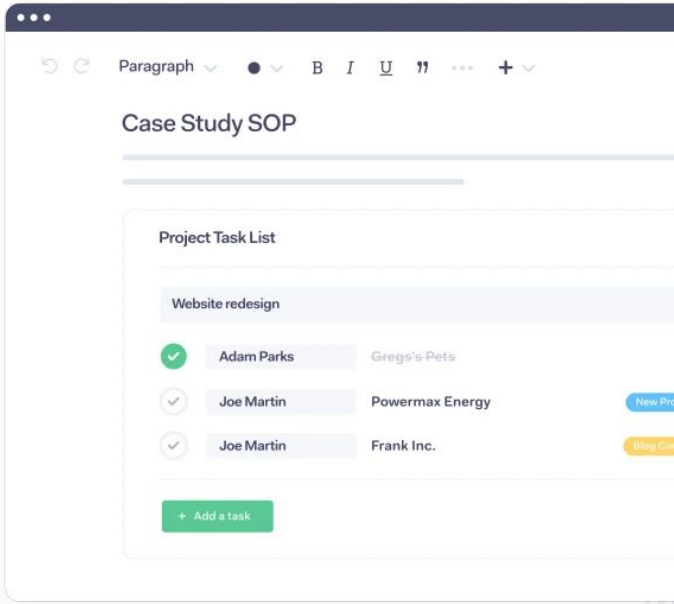
- One inbox for all client communication
- Use team inboxes for full transparency
- Access complete client interaction history
- Save time with workflows and ticket automations
- Integrated time tracking between Desk and Teamwork

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



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Product Roadmap

Q&A

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Thank You!