

teamwork.

# Product Roadmap Q3 2022

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# Your hosts

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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.



teamwork.

# Agenda

- Recently Released Features
- Coming Soon
- Q4 Sneak Peek
- And More
- Q & A



# How to participate today

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

A screenshot of a web application window 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 window has a standard blue header bar with a minus sign icon on the left and a help icon on the right.

Product Roadmap

# Recently Released Features

# Teamwork's Improved UX/UI ✨

ALL PLANS

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 Subtask		27th Oct	None	—	Marketing Design	
✓ Blog social and email image for Live Chat Subtask		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 5		—	High	—	Hackathon 2021	
✓ Form Submission: Empty state   Quick Search fea... 4		—	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 3		—	Low	—	Marketing Design	



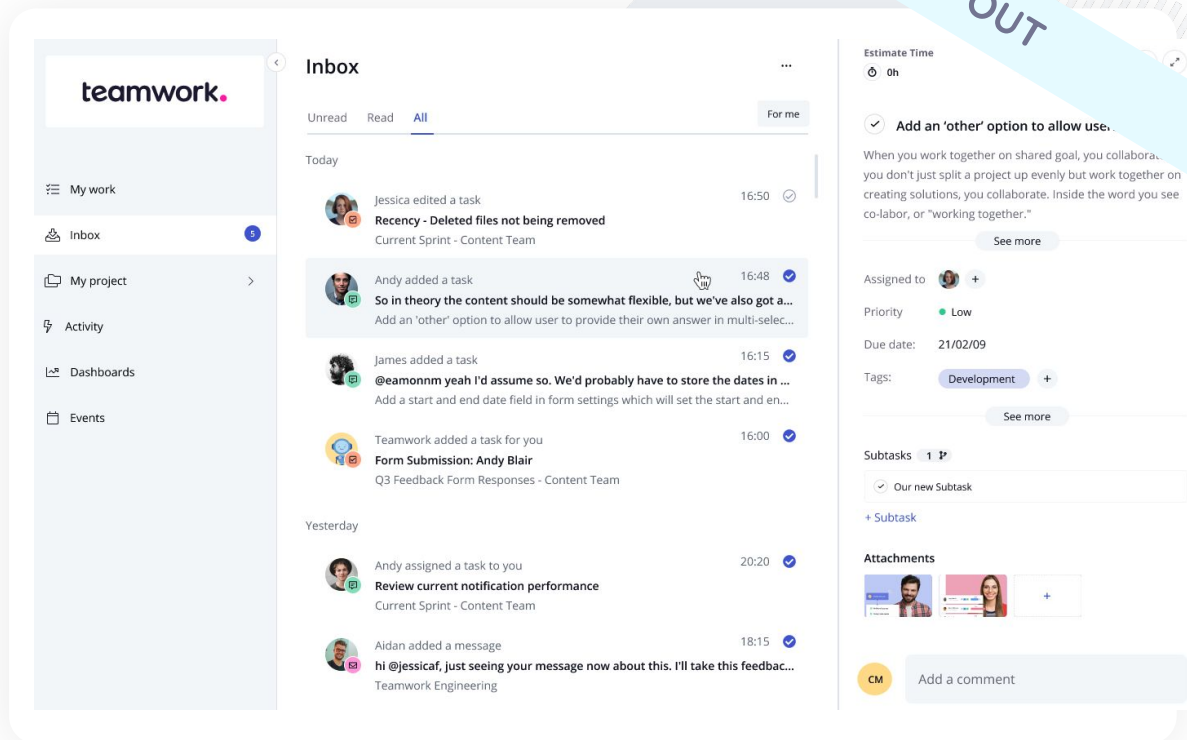
ROLLING OUT

# 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

Even more power

Now table view has all the power of list view but with the flexibility and customizability of:

- Improved filters
- More custom fields
- Task details streamlined
- More user friendly

The screenshot displays the Teamwork project management interface. On the left is a dark sidebar with navigation options: Quick Add, Search, My Work, Projects (selected), Time, Planning, Reports, and More. The main content area shows the 'Branding Project' for 'Finance Corp'. The 'Table' view is selected in the top navigation bar. Below this, a 'To do' section is visible. The main table lists tasks with columns for Task Name, Assignee, Due Date, Priority, Options, Estimated time, Logged time, and Tags. The tasks listed are: Customer Interviews, Personas (5), Reviews, Feedback (1), Design, Brainstorming, Concept Testing, Testing, and Roll-out. Each task row includes a checkmark, an assignee icon, a due date, a priority color-coded box, options (like Option 1, Option 2), estimated time, logged time, and a tag (like First P, Review, Publish).

Task Name	Ass...	Due D...	Priority	Options	Estimated ti...	Logged time	Tags
✓ Customer Interviews	[Avatar]	29th Jul	Low	Option 1	2h	3h	First P
> 5 Personas 5	[Avatar]	22nd Jul	Medium	Option 2	3h	7h	Review
✓ Reviews	[Avatar]	22nd Jul	High	None	8h	6h	
✓ Feedback 1	[Avatar]	Tomorrow	None	Option 2	10h	6h	
✓ Design	[Avatar]	9th Jul	Low	None	2h	8h	
✓ Brainstorming	[Avatar]	13th Apr	Medium	None	5h	1m	
✓ Concept Testing	[Avatar]	6th Apr	High	None	3h	1m	
✓ Testing	[Avatar]	3rd Feb	Low	None	5h	3h	
✓ Roll-out	[Avatar]	17th Jan	High	None	5h	—	Publish

# Filters

Be selective with your data in the table view

## Overview:

- Easily chose to display a subset of data
- Comb through the noise and work more strategically
- Save the filter for easy reference and future use
- Advanced filtering coming to the My Work table view next week

The screenshot displays the Teamwork interface for a project named "Branding Project" under "Finance Corp". The left sidebar shows navigation options: Quick Add, Search, My Work, Projects (selected), Time, Planning, Reports, and More. The main area is titled "To do" and shows a list of tasks in a table view. The tasks are filtered by priority and due date. A filters panel on the right allows for refining the view by tags, assignee, priority, board, and custom fields. The tasks listed include Customer Interviews, Personas (5), Reviews, Feedback (1), Design, Brainstorming, Concept Testing, Testing, and Roll-out.

Task Name	Ass...	Due D...	Priority
✓ Customer Interviews	[Avatar]	29th Jul	Low
> 5 Personas 5	[Avatar]	22nd Jul	Medium
✓ Reviews	[Avatar]	22nd Jul	High
✓ Feedback 1	[Avatar]	Tomorrow	None
✓ Design	[Avatar]	9th Jul	Low
✓ Brainstorming	[Avatar]	13th Apr	Medium
✓ Concept Testing	[Avatar]	6th Apr	High
✓ Testing	[Avatar]	3rd Feb	Low
✓ Roll-out	[Avatar]	17th Jan	High

The filters panel on the right shows the following settings:

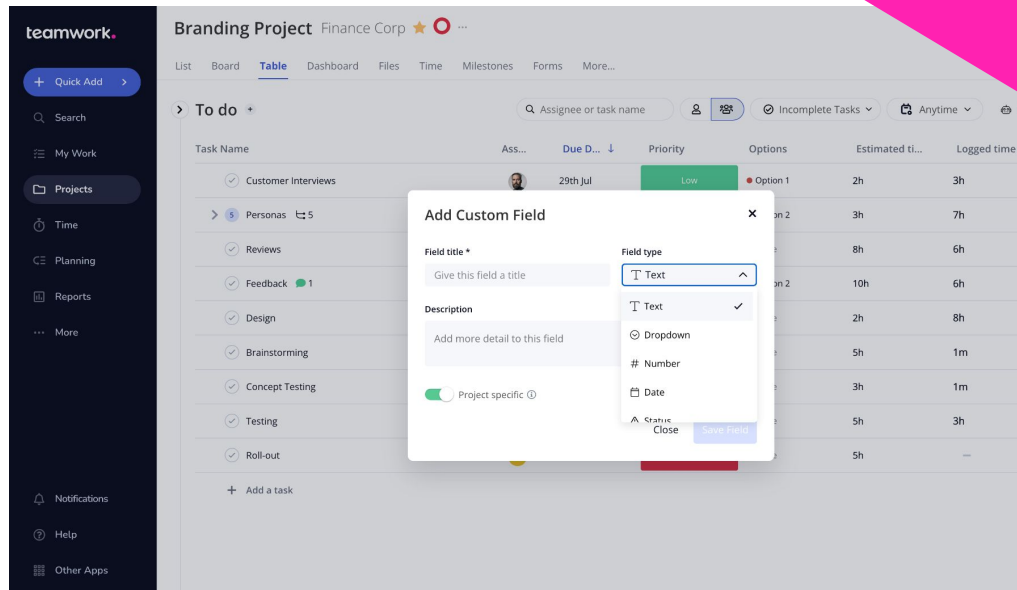
- Tags: [Dropdown]
- Assignee: [Dropdown]
- Priority: [Dropdown]
- Board: [Dropdown]
- Custom Fields: [Dropdown]
- Include subtasks: ☒
- Only tasks with unread comments: ☐
- Buttons: All tasks, Upcoming tasks, Late tasks, Saved filters, Clear all, Save filter

# Custom Fields

Put these new custom fields types to good use in table view

## Overview:

- **Date** - Great for an upcoming deadline, or a reminder to check in with a client
- **Status** - A handy and visual pulse check for the health of a task
- **URL** - Give more context and reduce clutter with URL field
- **Checkbox** - quick insights into binary items on a task—think “yes/no,” “on/off,” or “true/false”



# Task Details

Task details make it easy to:

- Work on tasks inline with table view
- Accomplish more work quickly and easily
- More user friendly and less context switching

The screenshot displays the Teamwork project management interface. On the left is a dark sidebar with navigation options: Quick Add, Search, My Work, Projects, Time, Planning, Reports, and More. The main area shows the 'Branding Project' for 'Finance Corp'. A 'To do' list table is visible, listing tasks like 'Customer Interviews', 'Reviews', 'Feedback', 'Design', 'Brainstorming', 'Concept Testing', 'Testing', and 'Roll-out' with their respective assignees and due dates. A right-hand panel provides detailed information for the selected task 'Customer Interviews', including its assigned person, dates (17th Jan - 29th Jul), priority (Low), and options to add a description, subtasks, dependencies, and attachments. A 'Time Logs' section at the bottom right shows a logged time of 3h.

Task Name	Ass...	Due D...
✓ Customer Interviews	[Avatar]	29th Jul
> 5 Personas	[Avatar]	22nd Jul
✓ Reviews	[Avatar]	22nd Jul
✓ Feedback	[Avatar]	Tomorrow
✓ Design	[Avatar]	9th Jul
✓ Brainstorming	[Avatar]	13th Apr
✓ Concept Testing	[Avatar]	6th Apr
✓ Testing	[Avatar]	3rd Feb
✓ Roll-out	[Avatar]	17th Jan
+ Add a task		

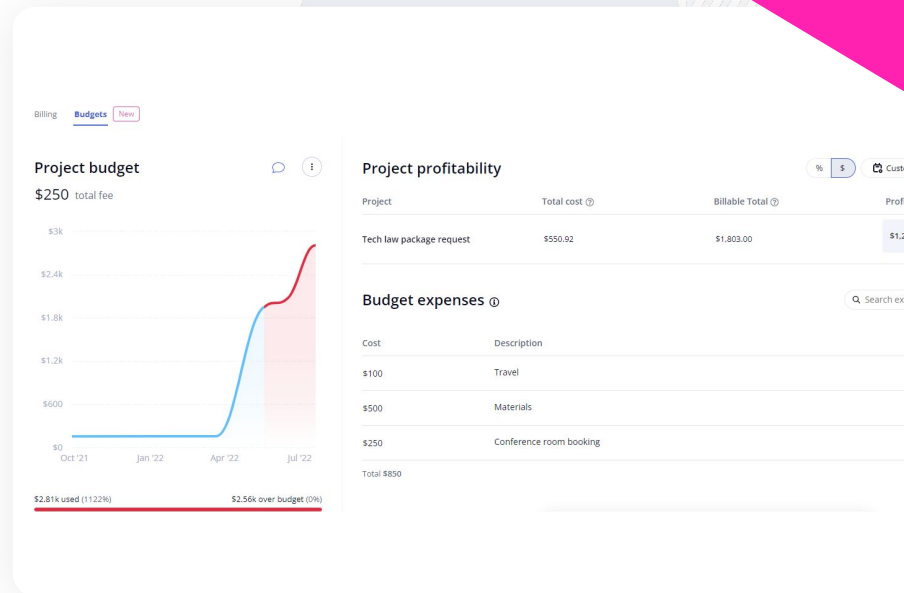
GROW

# Budgeting Home

New budgeting home area

## Overview:

- Manage your time or financial budgets in the new finance area of Teamwork
- Understand the profitability of your project at a glance
- Easily capture project specific expenses against your budget

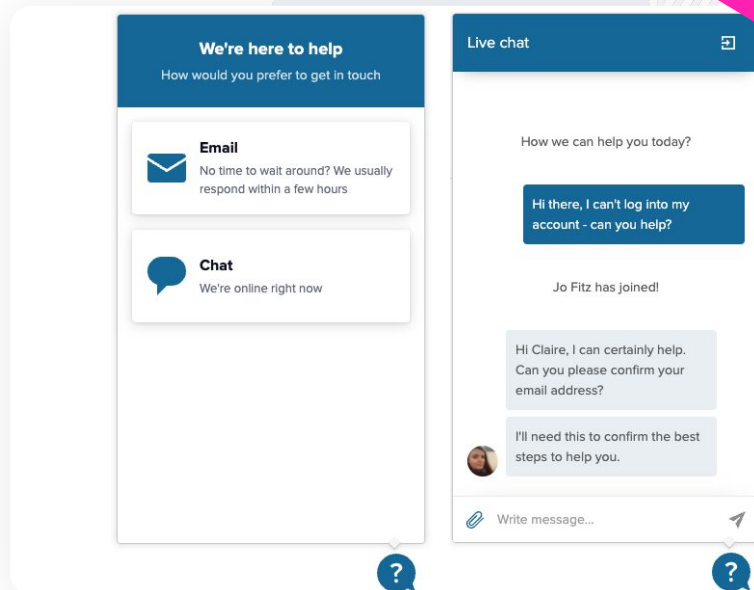


# Live Chat

Delight your customers with Live Chat and instant answers using Teamwork Desk.

## Overview:

- Live Chat support is associated with faster resolution times and happier clients.
- It provides an easily accessible support channel (front facing on your website).
- Unresolved issues during the chat? No problem, easily convert your live chat into a Desk ticket.



Product Roadmap

Coming Soon

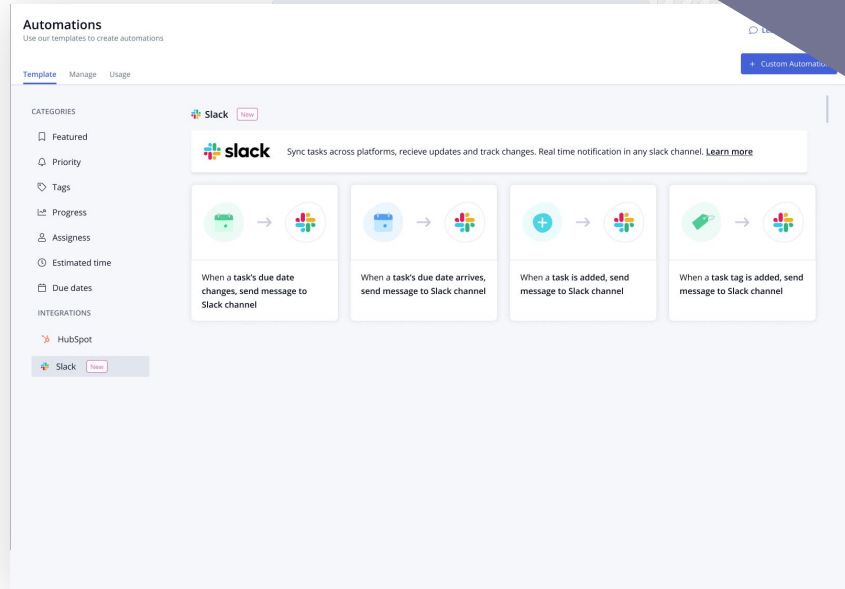


# Slack Automation

Automate Slack notifications to ensure everyone gets the updates

## Overview:

- Automatically notify users via slack when important updates are made
- Notify via selected Slack channels when tasks change for example



# Custom Reporting

Create the exact reports you need for better insights

## Overview:

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

teamwork.

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

SCALE PLAN

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

# Task List Budgets

Manage your budget at a task list level for greater and earlier insight into financial performance

## Overview:

- Track your project budget at a more granular level
- Assign sub-budgets to task lists for greater control
- Get on top of our budgets by identifying, and addressing, issues as they arise
- Currently in QA.

### Task list budgets

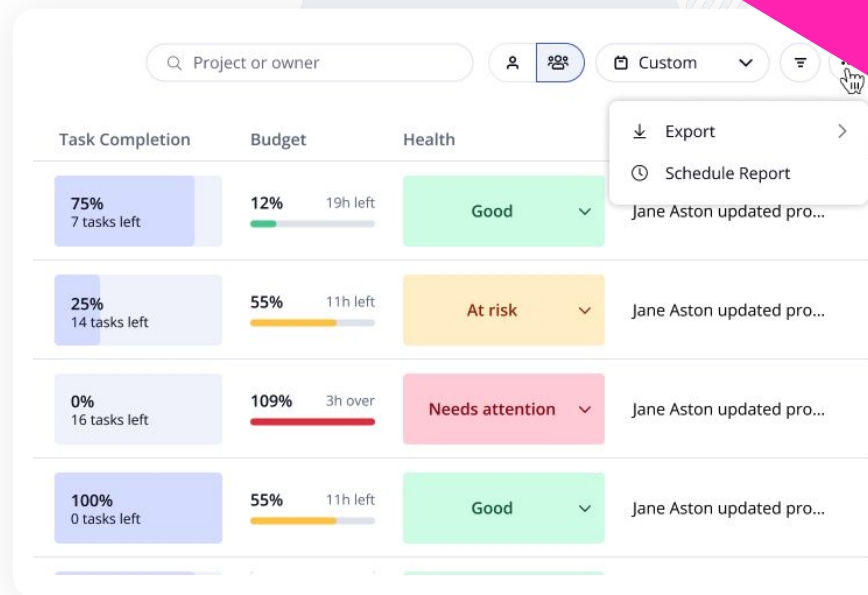
Task list	Budget	Progress	Notifications
Marketing	\$1,000	\$700 used (70%) <div><div></div></div>	+ via email + Add notification
Design	\$2,500	\$500 used (20%) <div><div></div></div>	+ Add notification
Project management	\$2,000	\$1,800 used (90%) <div><div></div></div>	+ Add notification
Engineering	\$2,000	\$900 used (40%) <div><div></div></div>	+6 + via email + via email + Add notification
Total \$7,500			

# 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.



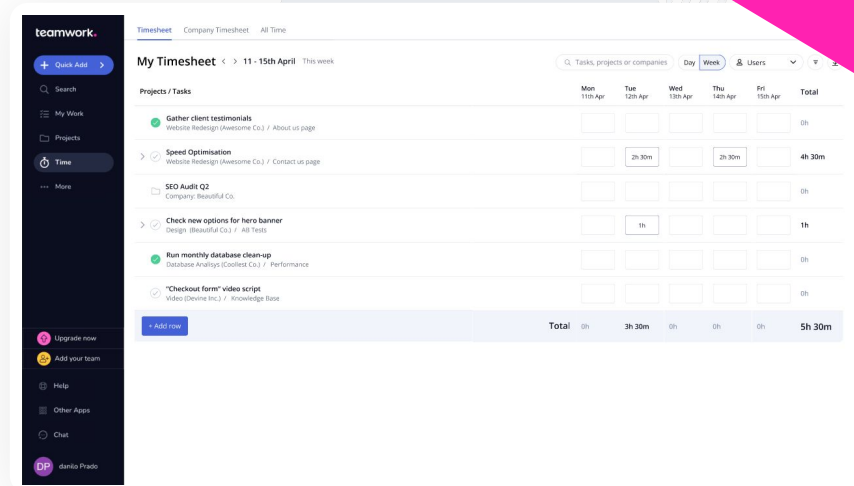
GROW & SCALE

# TimeSheet Solution

Bulk log time at the end of your day or week

## Overview:

- Making time tracking easier and quicker via bulk log time solution
- Identify gaps in your time logged and keep up to date with your time logs
- Personal and Company views



The screenshot displays the 'teamwork.' TimeSheet interface. On the left is a dark sidebar with navigation options: 'Quick Add', 'Search', 'My Work', 'Projects', 'Time' (selected), and 'More'. Below these are links for 'Upgrade now', 'Add your team', 'Help', 'Other Apps', 'Chat', and a user profile for 'daniel Prado'. The main area is titled 'My Timesheet' for the week of '11 - 15th April'. It features a table with columns for days (Mon 11th Apr to Fri 15th Apr) and a 'Total' column. The table lists several tasks with their durations: 'Gather client testimonials' (0h), 'Speed Optimisation' (2h 30m), 'SEO Audit Q2' (0h), 'Check new options for hero banner' (1h), 'Run monthly database clean-up' (0h), and 'Checkout form video script' (0h). A 'Total' row at the bottom shows 0h for Mon, 3h 30m for Tue, 0h for Wed, 0h for Thu, 0h for Fri, and 5h 30m overall. A pink banner in the top right corner reads 'GROW & SCALE'.

Projects / Tasks	Mon 11th Apr	Tue 12th Apr	Wed 13th Apr	Thu 14th Apr	Fri 15th Apr	Total
Gather client testimonials <small>Website Redesign (Awesome Co.) / About us page</small>						0h
Speed Optimisation <small>Website Redesign (Awesome Co.) / Contact us page</small>		2h 30m		2h 30m		4h 30m
SEO Audit Q2 <small>Company: Beautiful Co.</small>						0h
Check new options for hero banner <small>Design (Beautiful Co.) / AB Tests</small>		1h				1h
Run monthly database clean-up <small>Database Analysis (Coolest Co.) / Performance</small>						0h
"Checkout form" video script <small>Video (Diverse Inc.) / Knowledge Base</small>						0h
<b>Total</b>	0h	3h 30m	0h	0h	0h	5h 30m

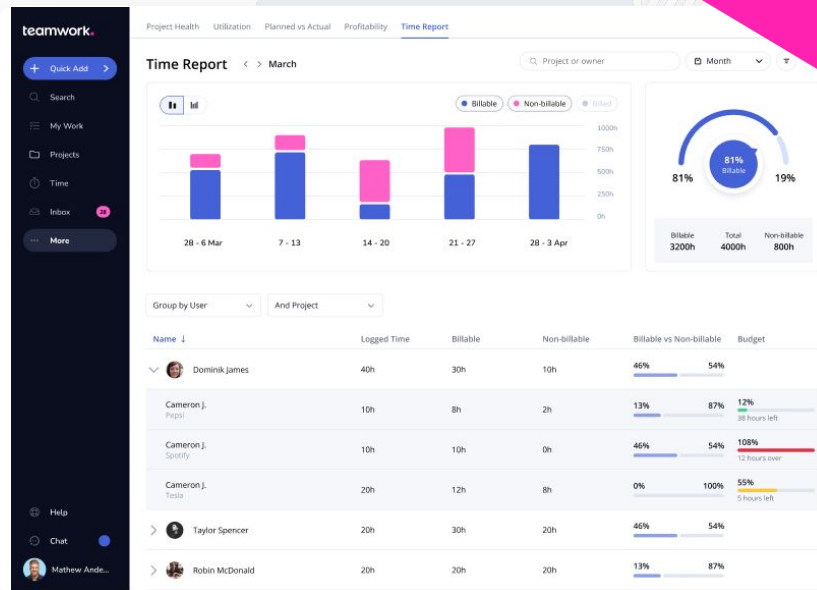
GROW & SCALE

# Time Reporting

## New Time Report

### Overview:

- Deeper understanding of your time data
- Easily group and view your time data across projects, clients, teams, tasks and users
- Ensure your billable time goals are being met
- In Engineering

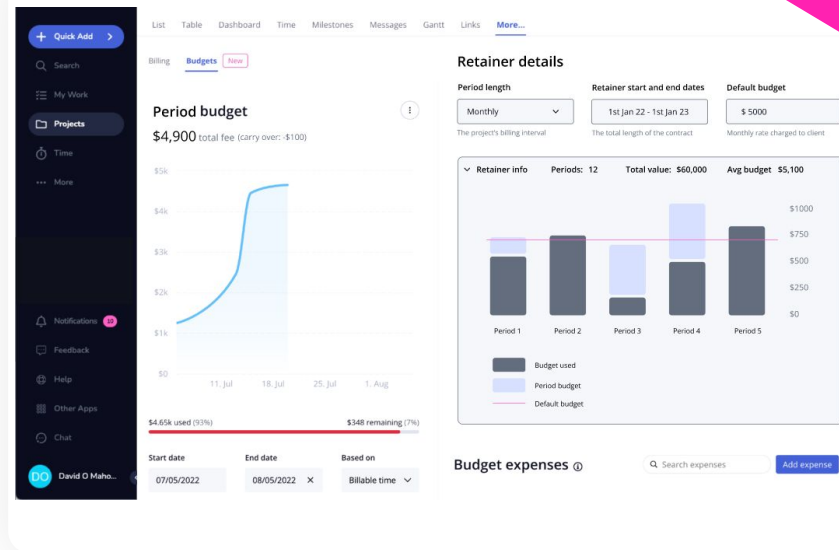


# Retainers

Retainer solution to help manage ongoing client engagements

## Overview:

- Manage and report easily on your retainers
- Handle the monthly/quarterly over or underspend seamlessly
- In Engineering



Product Roadmap

Q4 & Beyond

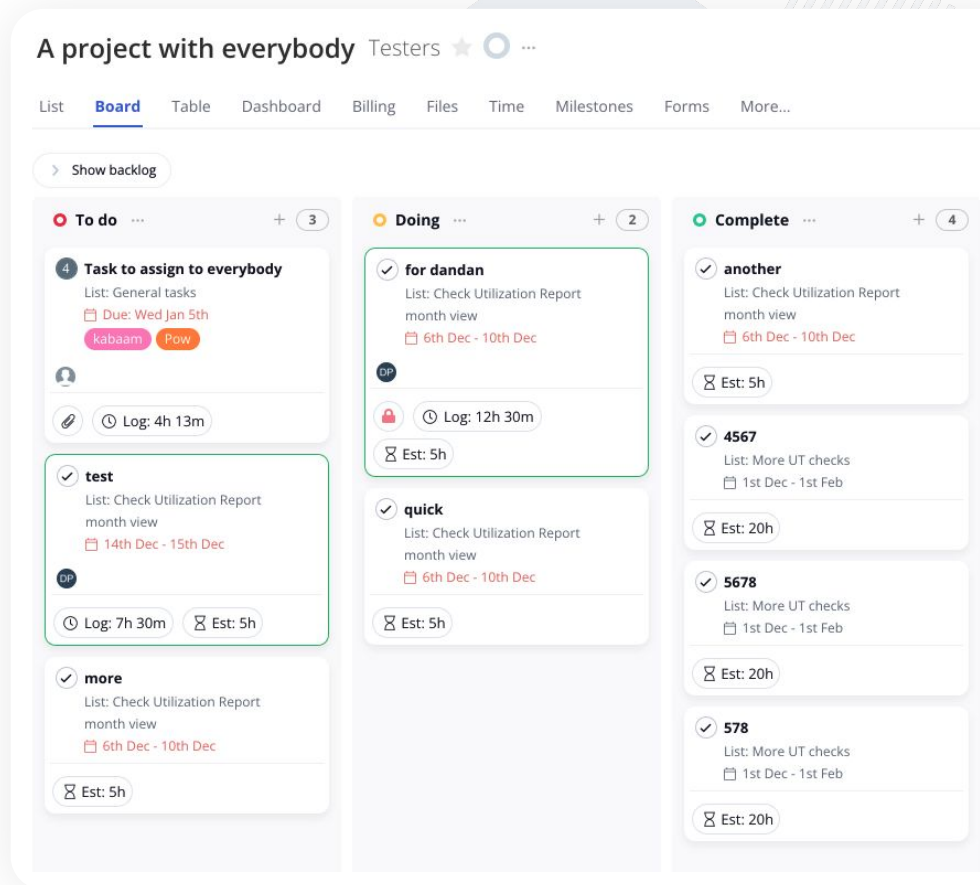


# Better Agile Project Mgmt

Improved Boards for better Agile project management

## Overview:

- Boards across Projects, to see work across multiple projects in one place
- Execute a shared agile workflow with improved automated workflows
- Basic Sprint Mgmt & Story Points

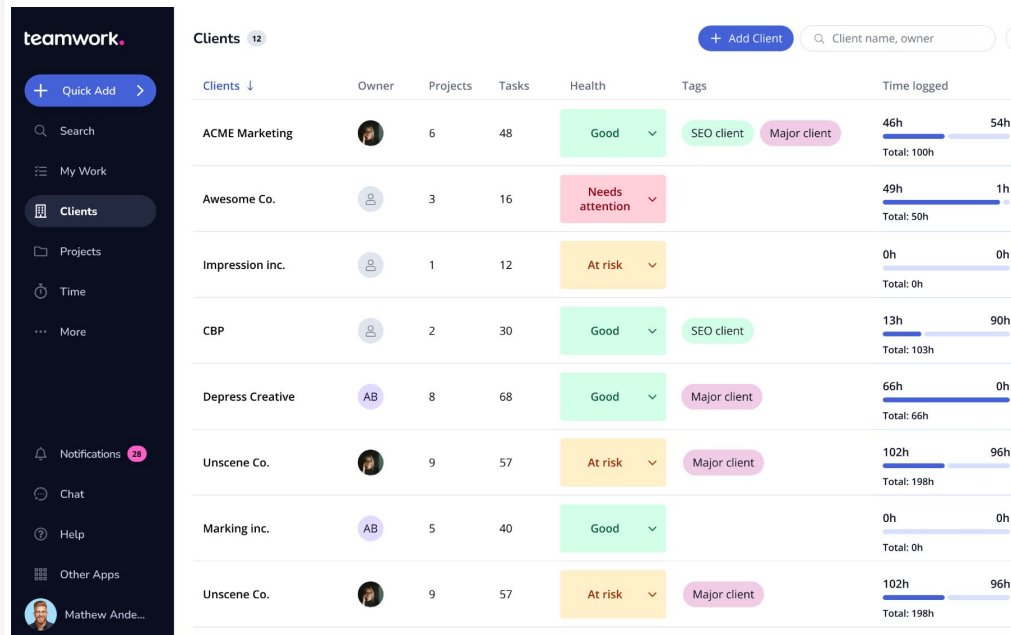


# Client View

Easily manage client work

## Overview:

- One centralized view organized by your clients
- All of the context for client projects, budgets, profitability and more in one place

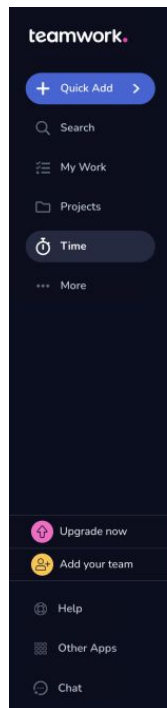


The screenshot displays the Teamwork Client View interface. On the left is a dark sidebar with navigation options: Quick Add, Search, My Work, Clients (selected), Projects, Time, and More. Below these are Notifications (28), Chat, Help, and Other Apps. The main content area shows a table of clients with columns for Client name, Owner, Projects, Tasks, Health, Tags, and Time logged. The table lists 12 clients, including ACME Marketing, Awesome Co., Impression inc., CBP, Depress Creative, Unscene Co., Marking inc., and Unscene Co. again. Each client row shows their health status (Good, Needs attention, At risk) and time logged (46h, 49h, 0h, 13h, 66h, 102h, 0h, 102h). The interface also includes a '+ Add Client' button and a search bar for client names and owners.

Clients	Owner	Projects	Tasks	Health	Tags	Time logged
ACME Marketing		6	48	Good	SEO client, Major client	46h Total: 100h
Awesome Co.		3	16	Needs attention		49h Total: 50h
Impression inc.		1	12	At risk		0h Total: 0h
CBP		2	30	Good	SEO client	13h Total: 103h
Depress Creative	AB	8	68	Good	Major client	66h Total: 66h
Unscene Co.		9	57	At risk	Major client	102h Total: 198h
Marking inc.	AB	5	40	Good		0h Total: 0h
Unscene Co.		9	57	At risk	Major client	102h Total: 198h

# Coming Next







- 2-way Calendar sync
- Advanced Timesheets
- Proofreading
- Proposals



Timesheet   **Company Timesheet**   All Time

Company Timesheet < > 11 - 15th April This week

Q Tasks, projects or compa

	Mon 11th Apr	Tue 12th Apr	Wed 13th Apr	Thu 14th Apr	Fri 15th Apr
 <b>Darian Holm</b> Web Designer	0h	0h	0h	0h	0h
 <b>Milan Parker</b> Senior Web Designer	0h	8h	0h	0h	0h
✓ Check new options for hero banner Project: Design (Beautiful Co.) / List: AB Tests	0h	4h	0h	0h	0h
✓ Check new options for hero banner Project: Design (Beautiful Co.) / List: AB Tests	0h	4h	0h	0h	0h
>  <b>Noel Jones</b> Front End Developer	0h	0h	4h 30m	4h 30m	2h 10m
 <b>Jodie Williams</b> Junior Web Designer	0h	0h	0h	0h	0h
>  <b>Kyle Cooper</b> Back-end developer	0h	0h	6h	4h 30m	0h
>  <b>Robin Hopkins</b> Senior Back-end developer	2h 10m	0h	0h	0h	9h
<b>Total</b>	0h	8h	0h	1h	0h

Product Roadmap

And More

# bandwidth



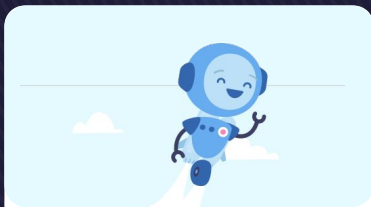
VIRTUAL SUMMIT BY **teamwork.**

**June 22nd** [www.teamwork.com/events/bandwidth](https://www.teamwork.com/events/bandwidth)

teamwork.

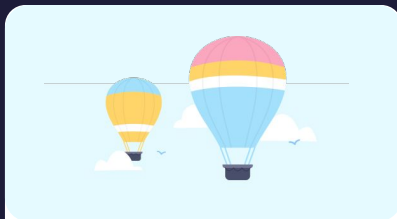
# Reach out to our team to try the **Scale features** for 30 days

[learn@teamwork.com](mailto:learn@teamwork.com)



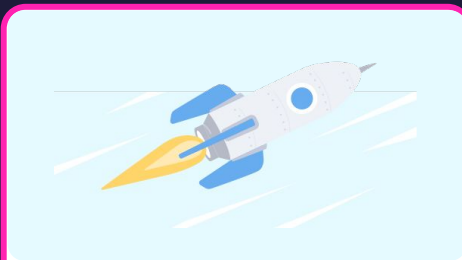
## Deliver

Manage multiple projects and delight your clients. A great place to start.



## Grow

Ideal for larger teams with features to help get you efficient and organized.



## Scale

Designed to help you track profitability, budget accurately, and resource your team efficiently.

# The Brief

[teamwork.com/blog](https://teamwork.com/blog)

teamwork.

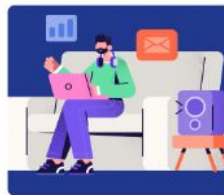
## The Brief

Better Teamwork starts here. Today we're exploring how process will keep your team productive and profitable in WFH, plus some cliffs notes on agile release planning.



Agile 101! Let's talk through the basics of agile release planning: what it is, why it matters, how to build an agile release plan, and best practices to keep in mind as you go.

[Read now](#)



How do you stay productive and profitable in WFH? Know how your team is working and save time from wasted work with structured process.

[Learn how](#)



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# Success Center

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## Get started with Teamwork

Set your team—and your clients—up for success with a little help from your friends at Teamwork.



### Watch

Let Teamwork experts show you the ropes with on-demand training sessions.

Go to section



### Join

Join us for a live training session to see Teamwork in action and ask questions.

Go to section



### Do

Prefer a hands-on approach? Let these guided exercises show you the way.

Go to section



### Read

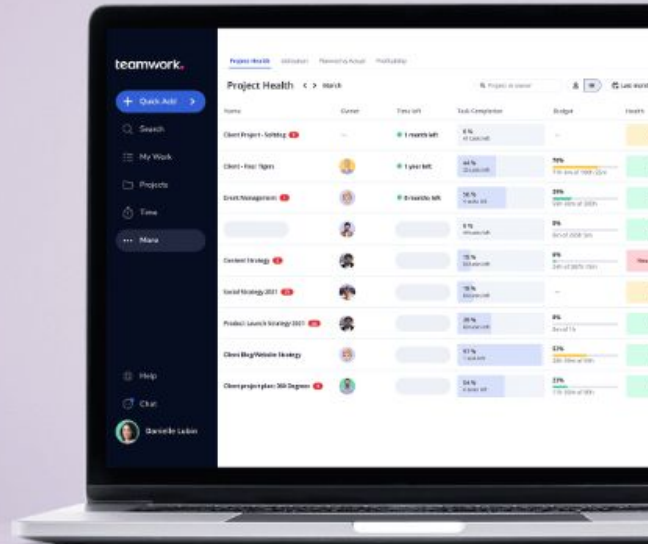
Dive into these in-depth guides to get a comprehensive overview of Teamwork.

Go to section



teamwork.

## Introducing the New Teamwork Look and Layout



*"I really like the new side navigation panel! The new search bar that surfaces my most recent projects has saved me a lot of time."*

*- Dan Marshall, Senior Creative Strategist, Tangible UX*

Product Roadmap

Q&A



teamwork.

Thank  
You!