teamwork.com

Product Roadmap

Q3 2026

Q2 2026

Recently released

Q2 2026

TeamworkAI

Brand new feature | Enhancement

"Plan my week" in My Calendar

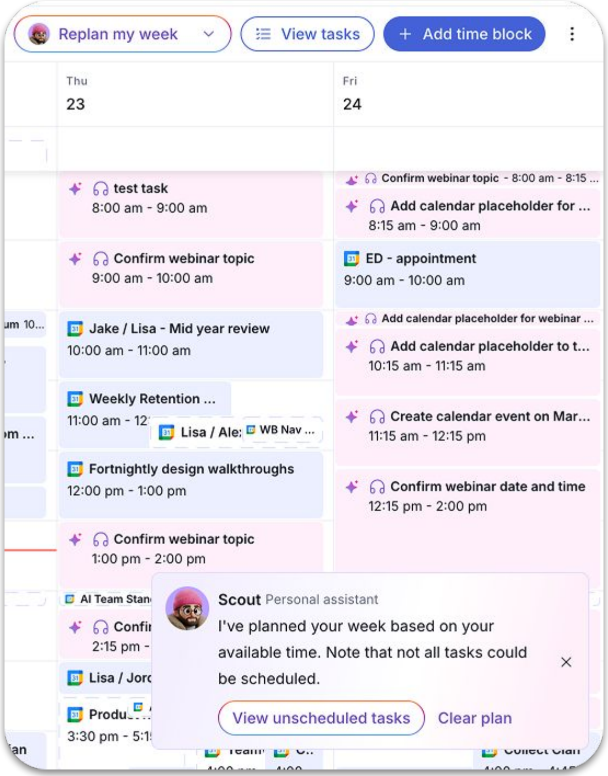
Plan your week in seconds with AI - let TeamworkAI automatically organize your priorities around your availability, deadlines, and workload in My Calendar.

Why you'll love it:

- **AI-powered weekly planning:** Scout analyzes your tasks, deadlines, and priorities to create a realistic plan for the week
- **Automatically schedule your work:** Fill your calendar around existing meetings and commitments
- **Save time and reduce admin:** Spend less time planning and more time getting work done
- **Stay focused on what matters:** Keep your most important tasks moving forward without manual juggling

Deliver | Grow | Scale

Status: Live | Coming Soon

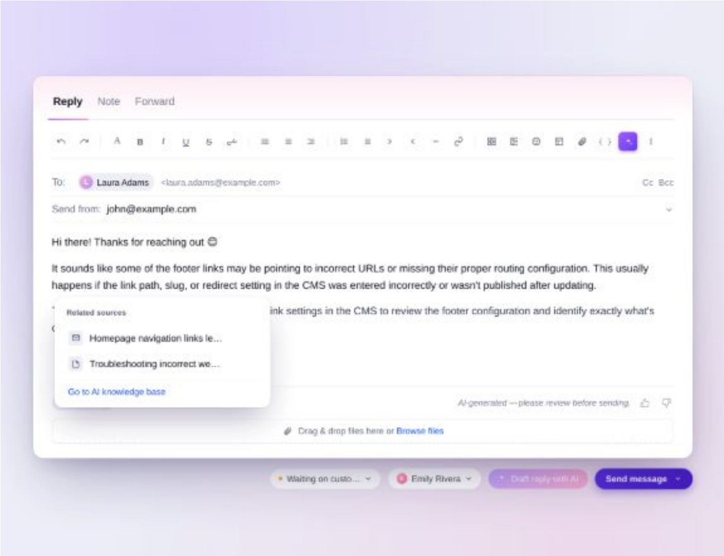


Draft ticket responses with AI

Securely connect your help docs, public policy links, and even your history of resolved tickets to generate high-context, accurate drafts instantly.

Why you'll love it

- **No more digging through tabs:** TeamworkAI automatically scrapes your help centers and past resolved tickets to draft a response that's grounded in your actual business data
- **Accuracy is paramount:** Your agents get a fully editable draft and can see the exact source links used by TeamworkAI, ensuring every reply is verified and personalized before it hits the customer's inbox



Status: Live Coming Soon

Q2 2026

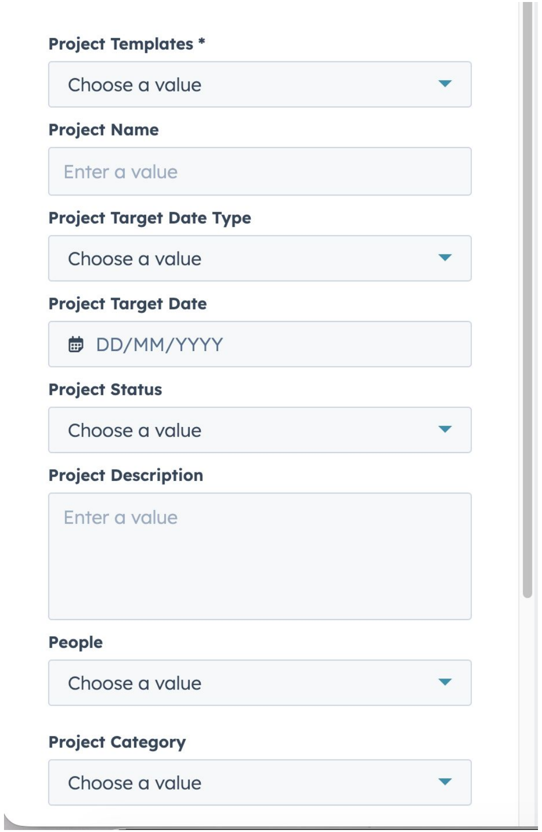
Manage client work

HubSpot app updates

These enhancements to your workflow action make project setup faster, more structured, and fully aligned with how you plan work.

Why you’ll love it:

- Set project budgets at creation for better forecasting and profitability
- Define start/end dates to keep delivery on track (highly requested!)
- Instantly create new clients when the project is created and link to the project



Deliver Grow Scale

Status: Live Coming Soon

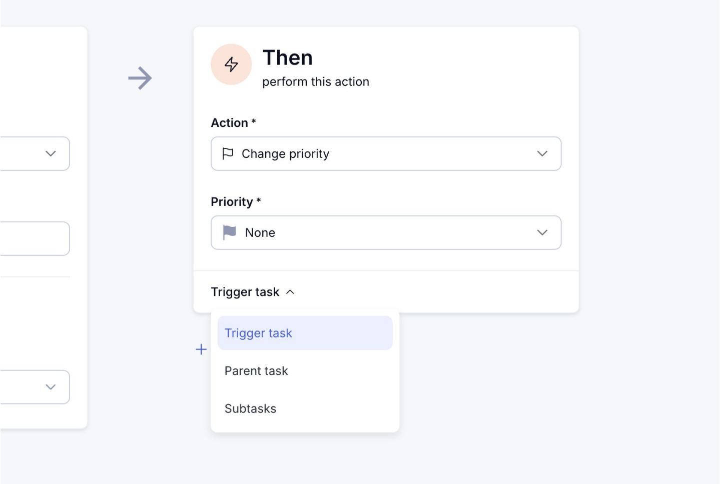
Brand new feature Enhancement

Automations action targeting

Take full control of your workflows by choosing exactly which tasks your automation actions should impact.

Why you'll love it:

- You're no longer limited to the task that started the automation. Move updates up to parents, down to subtasks, or across to newly created tasks
- Create a task and immediately perform follow-up actions on it all within a single automation



Deliver Grow Scale

Status: Live Coming Soon

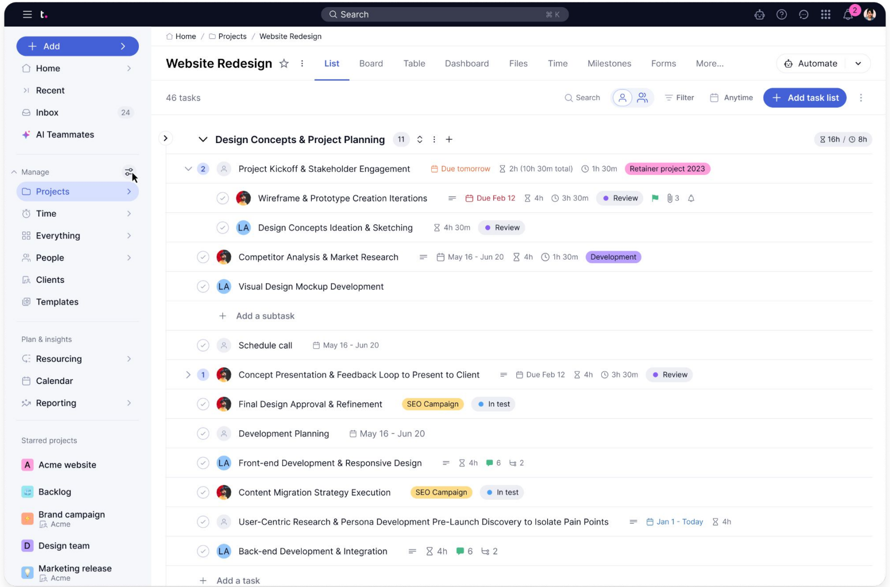
Brand new feature ✓ Enhancement

Navigation updates

A simpler, more focused navigation experience to get you where you need to go faster.

Why you'll love it:

- A streamlined UI that surfaces what matters most, with navigation organized around the things you come to Teamwork.com to do
- Customize your sidebar to fit your workflow - keep key items visible, move others to the *More* menu, or turn them off completely
- Quicker access to recent work, active tasks/projects, and information you use every day



Deliver Grow Scale

Status: ◉ Live ○ Coming Soon

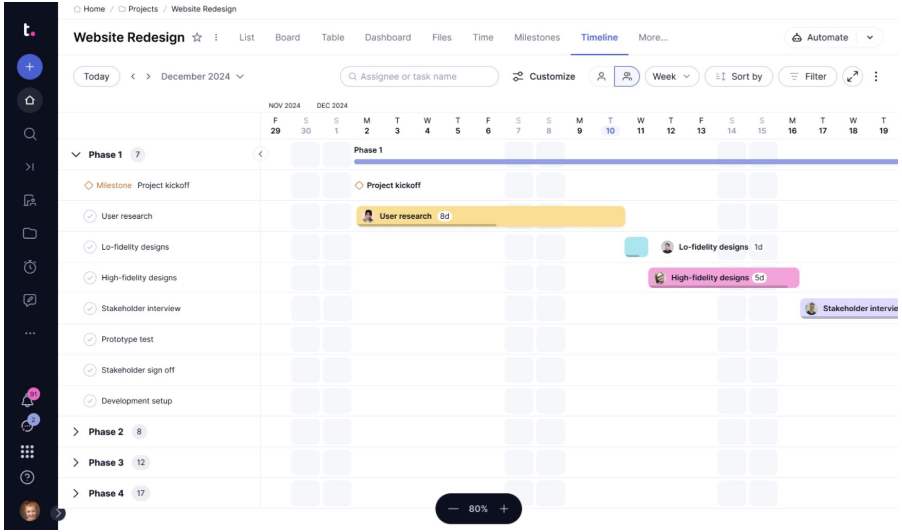
Brand new feature   Enhancement

Timeline View

A modern, reliable, and visual project view that makes it easier than ever to see your tasks, milestones, and dependencies at a glance.

Why you'll love it:

- Export to PDF
- Undo/redo functionality
- Dragging mode for dependencies
- Timeline included in templates (coming soon!)



Deliver **Grow** **Scale**

Status: Live Coming Soon

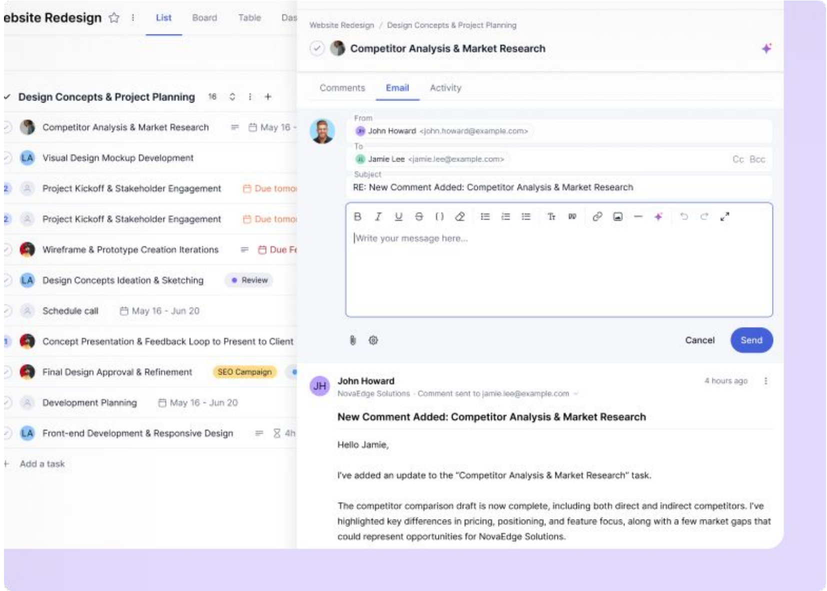
Brand new feature   Enhancement

Email connector in tasks

Email clients directly from the task with an all-new email integration for Outlook and Gmail!

Why you'll love it:

- Keep email and internal comments separate to enhance existing workflows
- Bring visibility to client communication regarding the task, keeping your whole team aligned
- Controlled at a site level



Deliver **Grow** **Scale**

Status: Live Coming Soon

Q2 2026

Plan resources

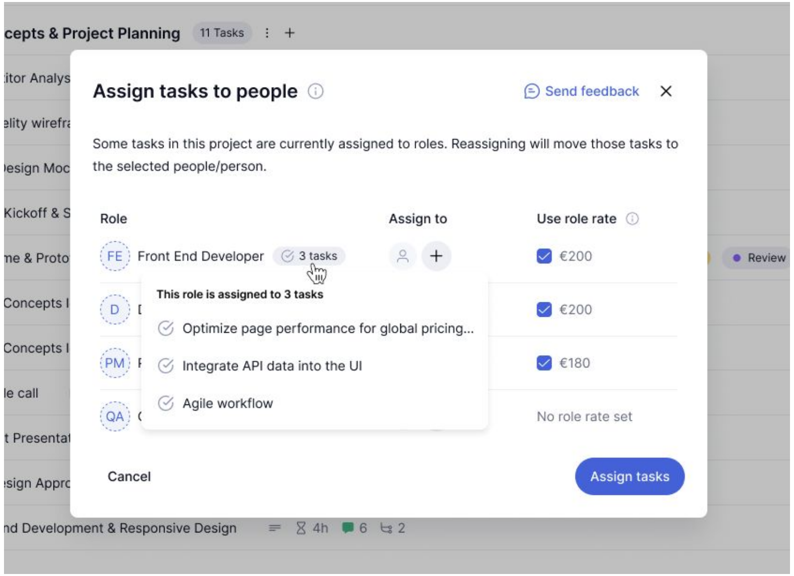
Brand new feature ✓ **Enhancement**

Role-based task assignment

Assign project tasks to roles. This allows teams to plan, and schedule work before staffing is confirmed, then seamlessly reassign to real users.

Why you'll love it:

- **Plan earlier with confidence:** Build full project plans without waiting for final staffing.
- **Quote and budget more accurately:** Use role-based rates for reliable early-stage pricing.
- **Reduce rework:** Easily reassign work from roles to real users via bulk task reassignment.



Deliver Grow Scale

Status: ● Live ○ Coming Soon

Financial insights in Scheduler

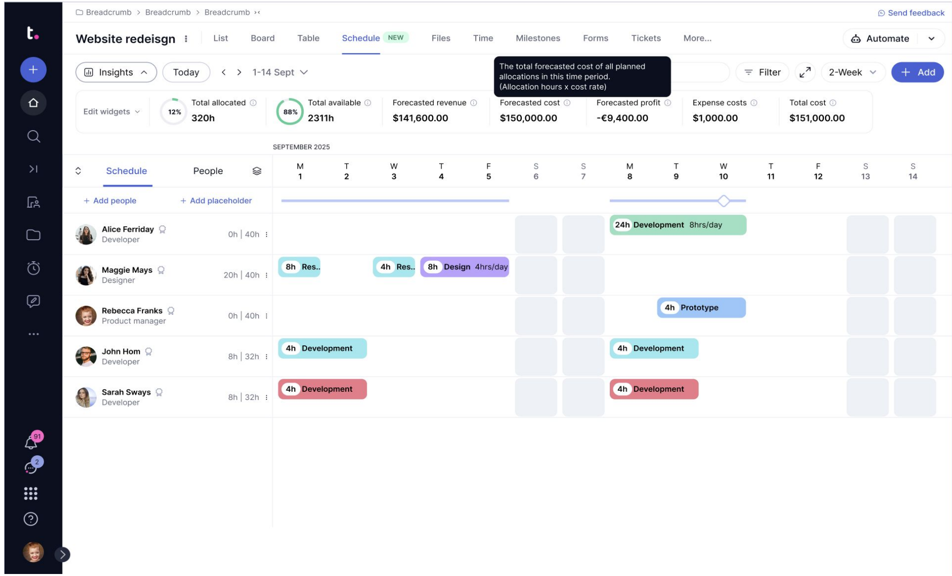
Understand cost and profit impact while scheduling

Why you'll love it:

New widgets inside a customisable insights bar

- Forecasted cost
- Expense costs
- Forecasted profit

No switching views, financial visibility directly in your planning workflow!



Deliver Grow **Scale**

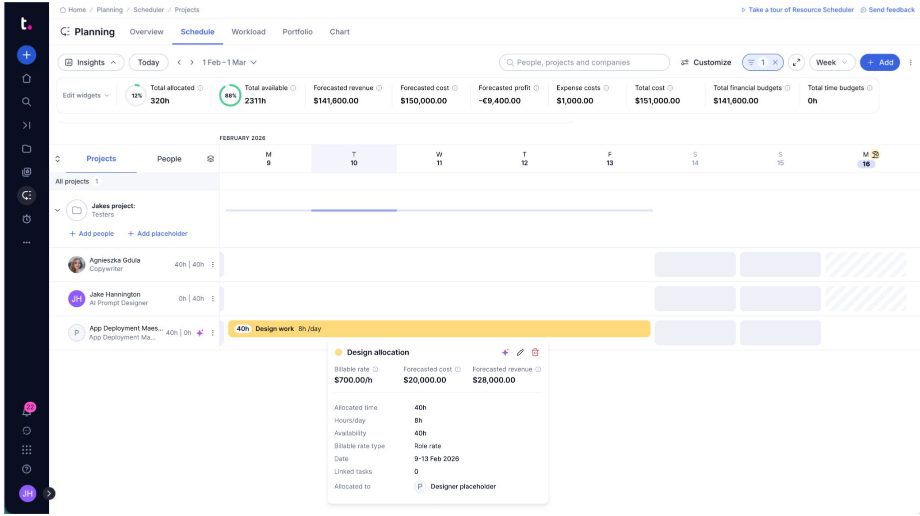
Status: ◉ Live ○ Coming Soon

Role-Based Rates in Scheduler

Understand financial impact while you schedule.

Why you'll love it:

- Role rates reflected directly in the Insights bar
- Forecasted cost and revenue shown per allocation for both users and placeholders
- See financial impact from day one, even when planning tentatively using templates



Deliver Grow **Scale**

Status: ● Live ○ Coming Soon

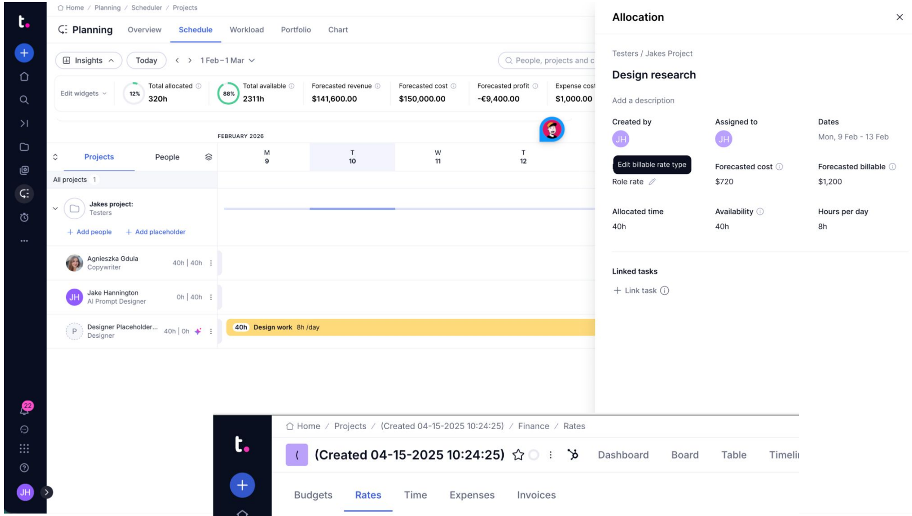
Brand new feature
Enhancement

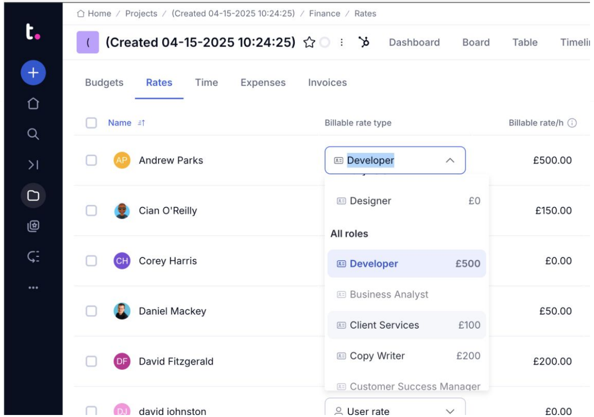
Multiple Roles per user

Let your team wear different hats… per project.

Why you'll love it:

- Assign a different role per project
- Billable rates follow that role
- Allows for reflect real-world team flexibility
- Less work: No more duplicate users or manual rate overrides





Deliver
Grow
Scale

Status: Live Coming Soon

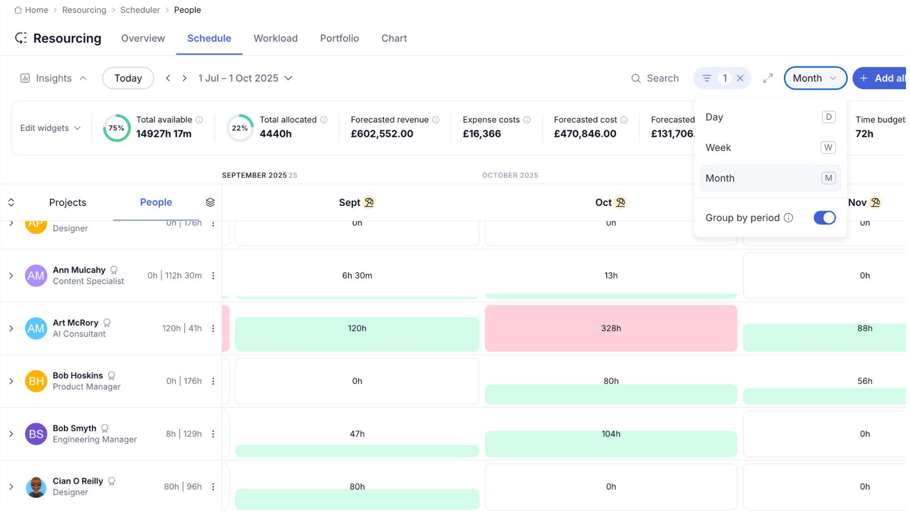
Brand new feature   Enhancement

Group by week & month

Zoom your resourcing view in or out to plan at the level that suits the decision.

Why you'll love it:

- **Switch between week and month views,** so you can plan the detail of the coming weeks or the shape of the months ahead
- **Spot over and under allocation faster** by seeing capacity across the right time horizon
- **Plan long-term with confidence,** stepping back to the bigger picture without losing the detail



Deliver   Grow   **Scale**

Status: Live   Coming Soon

Q3 2026

Make projects profitable

Brand new feature

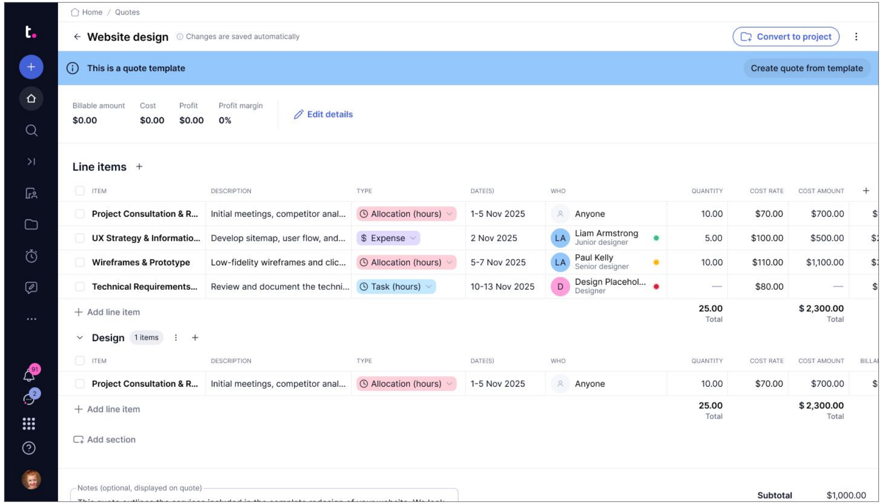
Enhancement

Quote templates

Save your most-used quotes as reusable templates or create new quote templates from scratch. Pull one off the shelf and only tweak the minor details.

Why you’ll love it:

- Build a library of reusable quotes for common services
- Spin up a new quote from a template in seconds, then edit only what's changed
- Keep pricing, line items, and terms consistent across your company



Deliver

Grow

Scale

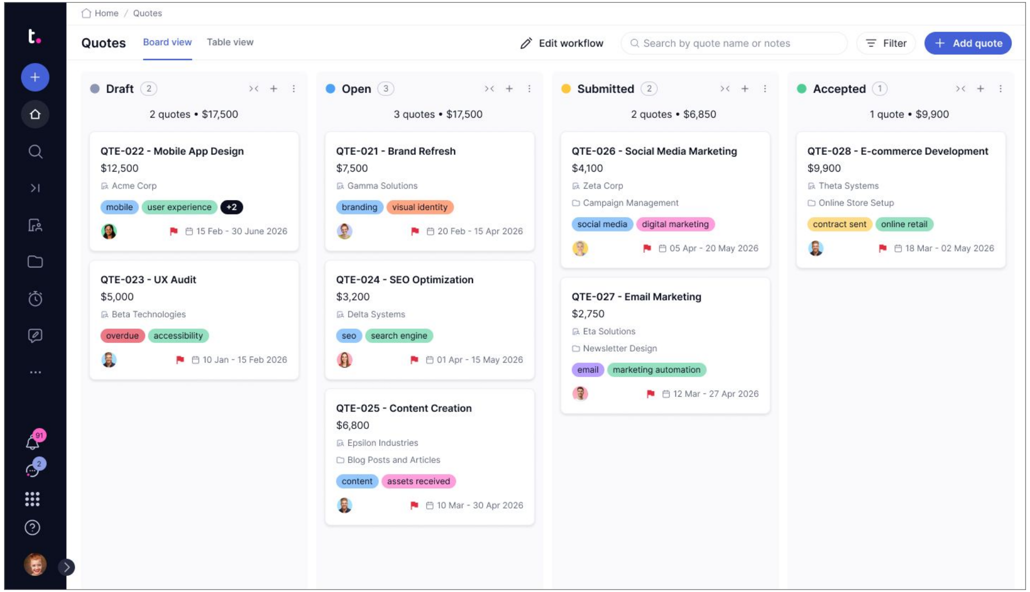
Status: Live Coming Soon

New Quote views

New ways to view your quotes are now live. You can bow zoom out across clients and track quotes pipeline-style.

Why you'll love it:

- **Global View:** Every quote across every client in one place, for portfolio-level visibility
- **Board View:** A Kanban-style pipeline to track quotes through their stages at a glance



Deliver Grow **Scale**

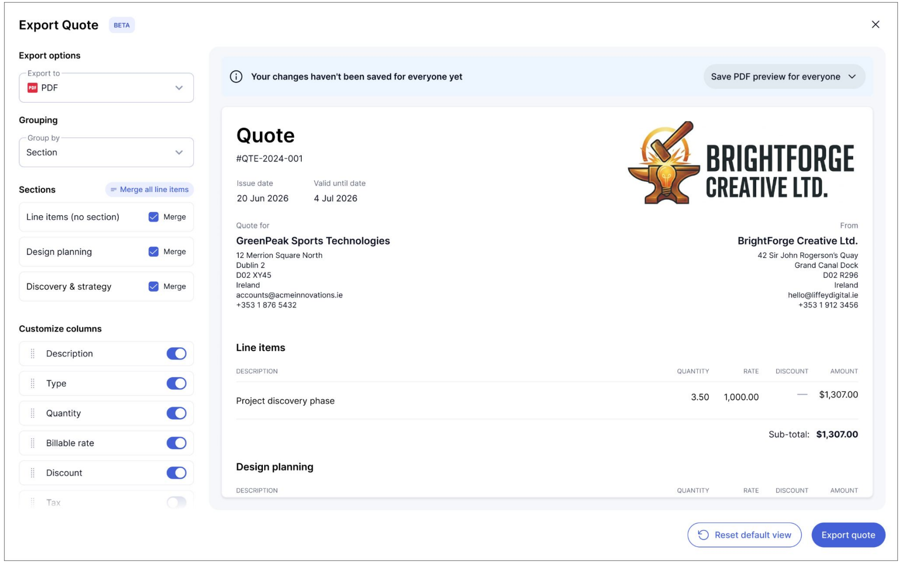
Status: ● Live ○ Coming Soon

Quote preview customizations

Enjoy more flexibility over how details are presented in your Quotes. These finishing touches help reduce visual clutter, surface the most relevant info, and better tailor to the customer experience.

Why you'll love it:

- Reorder columns to hide sensitive info and create a natural flow
- Group sections by Section, Assignee, or Task
- Merge line items per section for a tidy rolled-up summary view



Deliver Grow **Scale**

Status: ● Live ○ Coming Soon

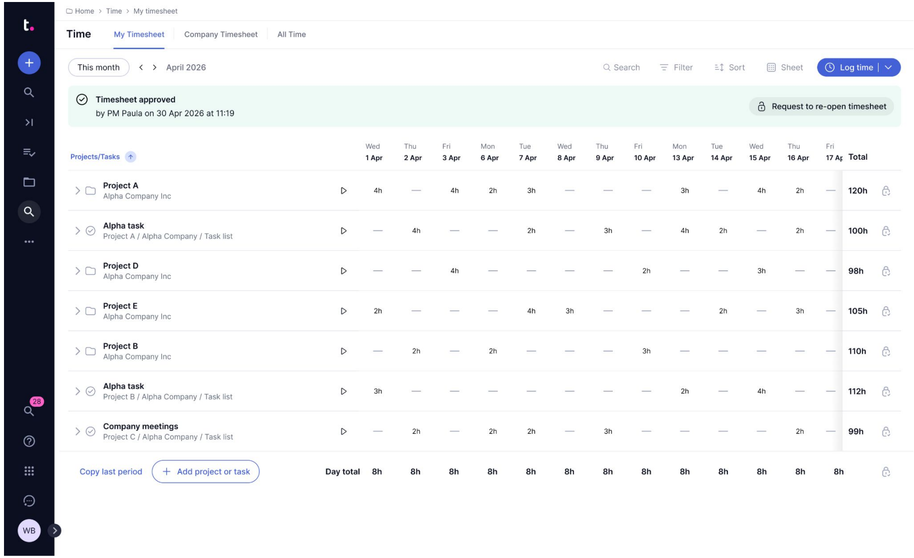
Brand new feature ✓ **Enhancement**

Monthly time approvals

Until now, timesheets could only be reviewed, approved, and locked on a weekly cadence. For teams that run on monthly billing or reporting cycles, that meant extra work reconciling four weekly approvals into one monthly view.

Why you'll love it:

- Review, approve, and lock timesheets on a monthly cadence
- Align approvals with monthly billing, payroll, or client reporting cycles
- Cut admin overhead for finance and ops teams managing time at month-end



Deliver Grow **Scale**

Status: ● Live ○ Coming Soon

Q2 2026

Track performance

Brand new feature ✓ **Enhancement**

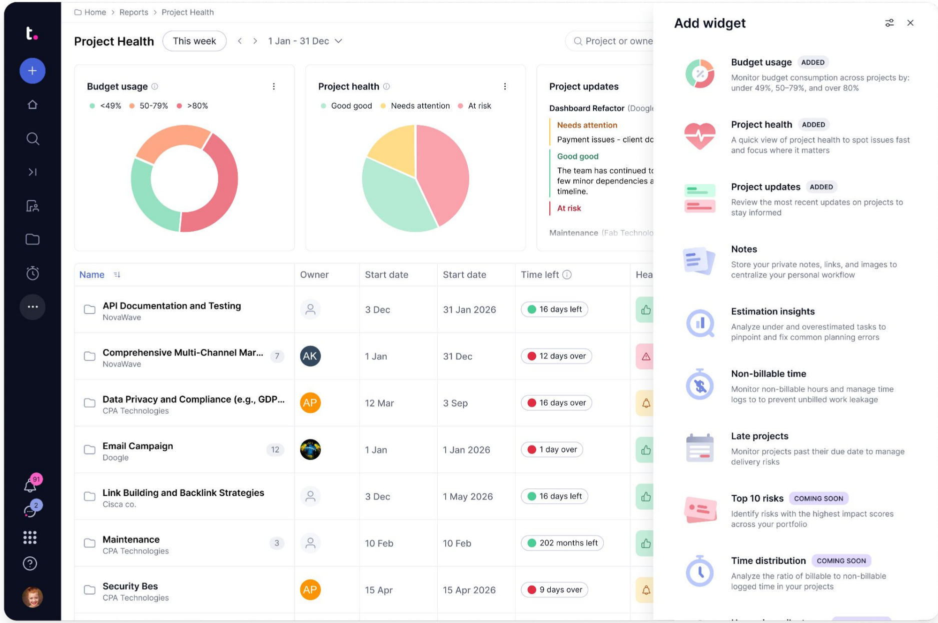
Project Health Insights

Gain deeper visibility into your projects with a brand-new Insights Panel in the Project Health Report!

Why you'll love it:

- Add widgets for estimation insights, budget usage, time distribution, and more
- Customize widgets with visualizations and threshold-based colors
- View key insights layered on top of your existing Project Health Report

**Widget availability based on subscription plan.



Deliver **Grow** **Scale**

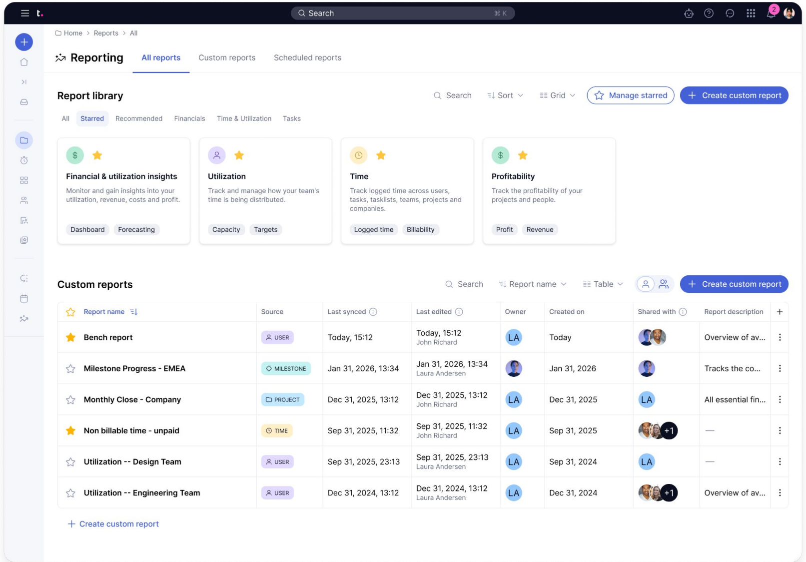
Status: ◉ Live ○ Coming Soon

Reporting gallery updates

An uplifted UX and UI for the Reports gallery, bringing a smoother experience alongside some genuinely valuable feature additions.

Why you'll love it:

- Duplicate any pre-canned report as a Custom Report, add or remove columns, apply filters, and save your own version (a huge time-to-value win for Custom Reports!)
- Star your favorite reports for quick and easy access
- Switch between a new grid AND table layout to suit how you work
- Find everything you've built in a dedicated Custom Reports tab



Deliver **Grow** **Scale**

Status: ◉ Live ○ Coming Soon

Q3+

Coming soon

Early access:

- New Table View (Project)
- Task-email integration
- Client Portal

Q3+ 2026

TeamworkAI

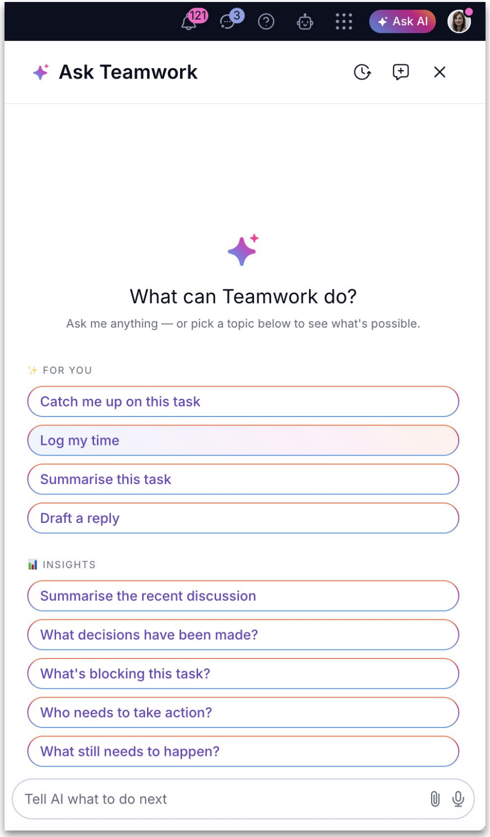
Brand new feature   Enhancement

Ask AI

Fnd answers, take action, and stay productive without leaving your flow.

Why you'll love it:

- **Ask in plain English:** Get instant answers from your live Teamwork.com data
- **Find work faster:** Locate tasks, projects, deadlines and updates without searching
- **Log time in seconds:** Add or bulk log time with a simple request
- **Take action instantly:** Create or edit tasks, update work, reply to comments, and draft project updates



Deliver   Grow   Scale

Status: ○ Live ● Coming Soon

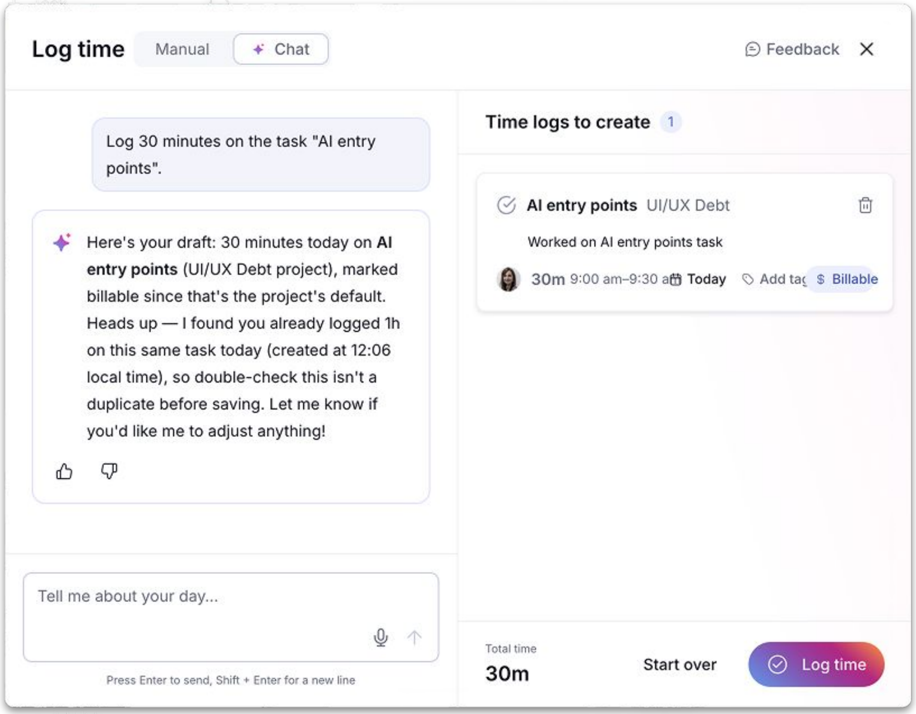
Brand new feature | Enhancement

AI time logging

Describe your day in plain English, and TeamworkAI will draft accurate time logs for you to review.

Why you'll love it:

- **Just describe your work:** No need to find tasks or fill out forms
- **Log time in seconds:** TeamworkAI matches work to the right tasks and projects
- **Review before submitting:** Edit anything before your time is logged.
- **Catch up with ease:** Log a full day or multiple entries in one request



Deliver | Grow | Scale

Status: ○ Live ● Coming Soon

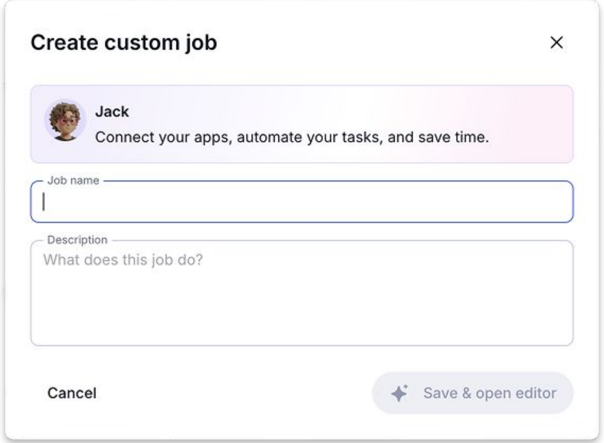
Brand new feature | Enhancement

Meet Jack, our newest AI Teammate

Jack lets you build custom workflows that connect Teamwork.com with the tools you use, automating the way your business gets work done.

Why you'll love it:

- **Connect Teamwork to the tools you already use**, like Xero, QuickBooks, HubSpot and MS Dynamics, and pull that data into your projects
- **Set up workflows that run automatically**, so things flow into Teamwork without anyone copying them in manually
- **Go beyond our built-in integrations**: Fill the gaps and handle logic that's specific to how your business works



Deliver | Grow | Scale

Status: Live | Coming Soon

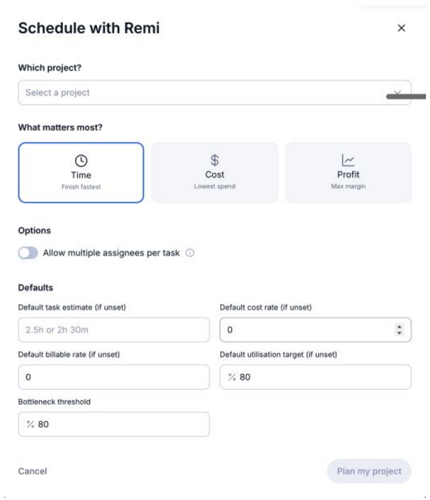
Brand new feature | Enhancement

Meet Remi, your Resource assistant

Remi is your personal assistant for resource planning. She'll help you staff projects in seconds, balancing your team's capacity against what matters most!

Why you'll love it:

- **Schedule your projects:** tell Remi what matters most (time, cost, or profit) and she'll propose the optimal schedule for your team
- **Protect your margins** by factoring in billable rates, cost rates, and utilization targets before work ever starts
- **Spot bottlenecks** before they happen, so you can rebalance workloads instead of firefighting mid-project.



Add-on

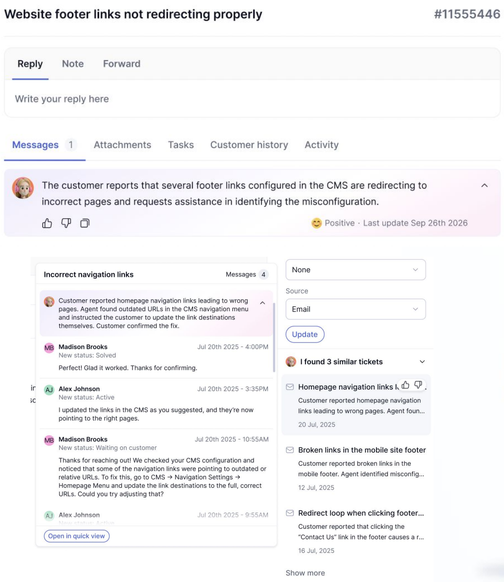
Status: Live | Coming Soon

Meet Dotty, your Desk assistant

Dotty is your personal assistant for all things Desk. She’ll help you be more efficient and ensure you have all information on hand when responding to client requests.

Why you'll love it:

- **Build your knowledge base** using historical tickets, help docs, and external links so replies are based on **your** content
- **Let Dotty propose replies** based on what worked before and your knowledge base, then edit and send, cutting time spent drafting responses
- **Spot trends across your tickets automatically**, so you can surface patterns to product and fix issues before they become problems.



Add-on

Status: ○ Live ● Coming Soon

Auto-suggested replies

Dotty draft responses automatically, going off of trends she's confident answering.

Why you'll love it:

- **Faster replies, stronger relationships:** Routine, FAQ-style tickets get an instant draft, so clients hear back in a fraction of the time, keeping client relationships healthy.
- **Nothing sends without you:** AI proposes, your team decides. Every reply sits in review until a human approves it, so you get the speed of automation with none of the "did the bot really just say that?" risk.
- **Free your team for the complex work:** Dotty takes the repetitive questions out of the queue, so your team gets their time back for the high-value problems that actually need a human.

Add-on

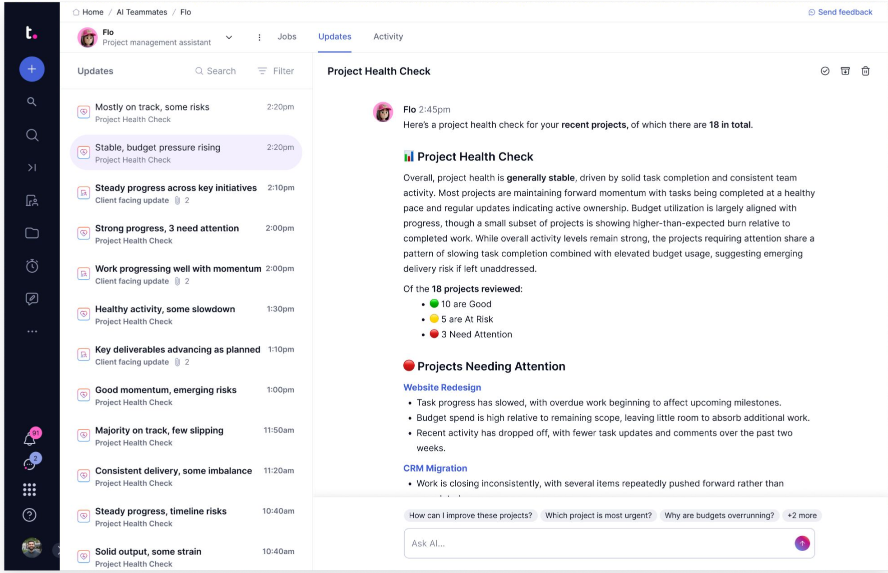
Status: ○ Live ● Coming Soon

AI Teammates: Multi-channel updates

Today, every AI Teammate output lands in a single, blended stream—making it hard to find, read, or act on what matters. Soon, each job instance will have its own dedicated channel.

Why you'll love it:

- Dedicated channels per job instance for easier search and readability
- Have your AI Teammates take contextual action on outputs with point-and-click and/or chat-initiated follow-ups
- Kick off next steps right where the output lands, without context switching



Deliver Grow Scale

Status: ○ Live ● Coming Soon

Q3+ 2026

Manage client work

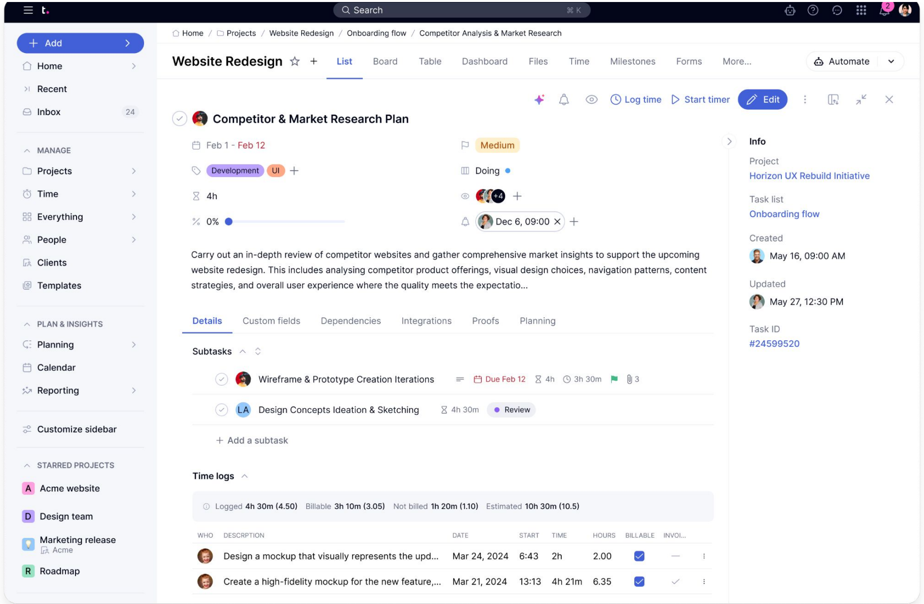
Brand new feature ✓ Enhancement

Improved Task Details layout

A cleaner Task Details experience that helps you focus on the work, not the UI.

Why you'll love it:

- More intuitive experience that's faster to use and simpler for new teammates to learn
- Key task details are shown upfront with extra information tucked away until you need it
- A clearer layout, better spacing, and improved text make tasks easier to read at a glance



Deliver Grow Scale

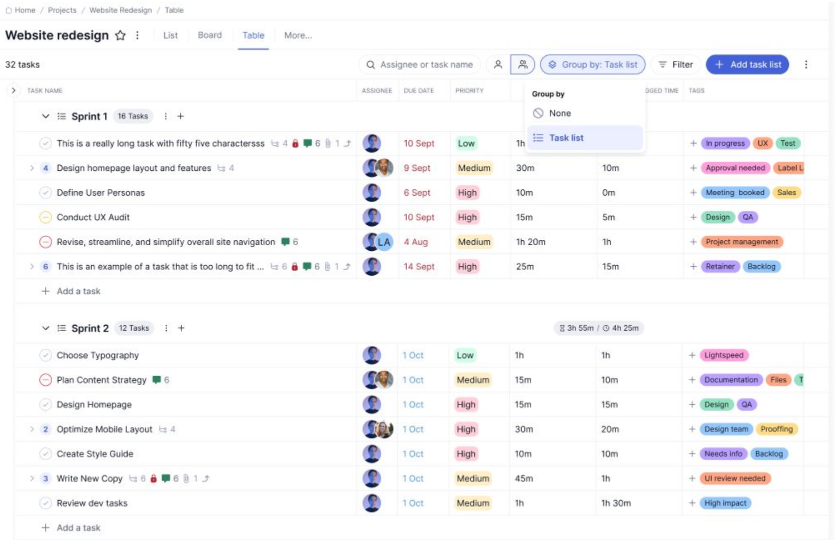
Status: ○ Live ● Coming Soon

New Table View experience

An enhanced Table View within individual **Projects**, bringing the same power and flexibility from Everything into a more focused, project-level experience.

Why you'll love it:

- Create and update tasks directly in the table without losing context
- Delivers a consistent experience across views with alignment to List and Everything Tables
- Offers flexible ways to view work with "Group by" options that fit your workflow



Deliver
Grow
Scale

Status: Live Coming Soon

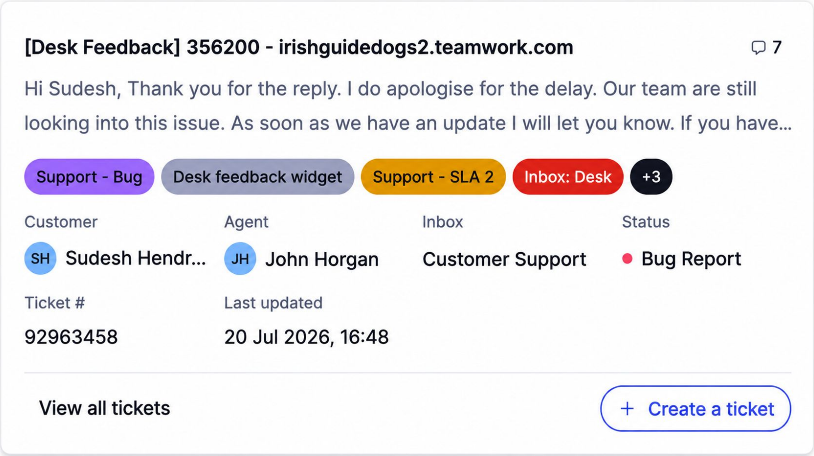
Brand new feature ✓ **Enhancement**

Improved view of tickets in tasks

We're improving how tickets are surfaced in both Task Details and in task list views.

Why you'll love it:

- Include more of the information you need at a glance from the task list view
- Return ticket IDs and number of tickets—including in Task List Reports to help you prioritize faster
- Improve visibility of multiple tickets attached to a task so you can quickly see the status of each, and take action faster



Deliver **Grow** **Scale**

Status: ○ Live ● Coming Soon

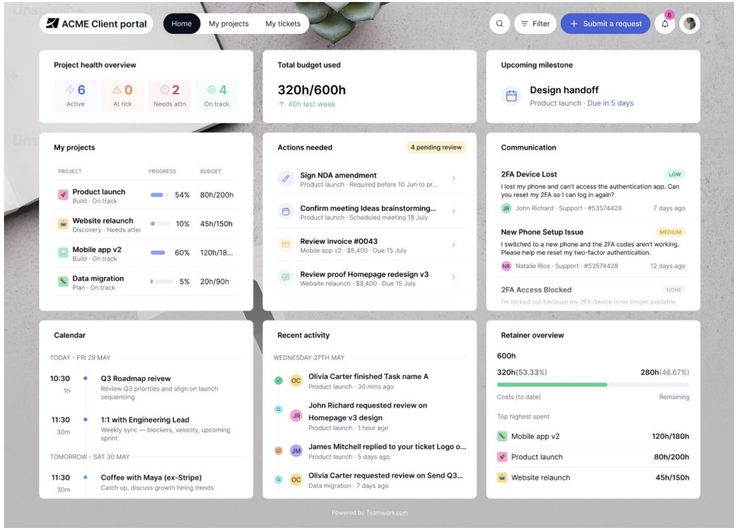
Brand new feature | Enhancement

Client Portal

Real-time work visibility your clients actually trust — without the manual reporting.

Why you'll love it

- **Reclaim hours every week:** Stop building weekly status emails, Excel dashboards, and manual summaries. Your team can reclaims this time
- **Strengthen client relationships through transparency:** Clients see real-time project progress, upcoming milestones, and open requests in one place. It builds trust, reduces "where are we?" emails, and gives you a competitive advantage when renewing contracts
- **Look professional and stay in control:** A branded, customizable portal that reflects your org's identity not Teamwork.com's internal UI. You decide what clients see and keep your internal workflows completely separate and hidden.



Status: ○ Live ● Coming Soon

Q3+ 2026

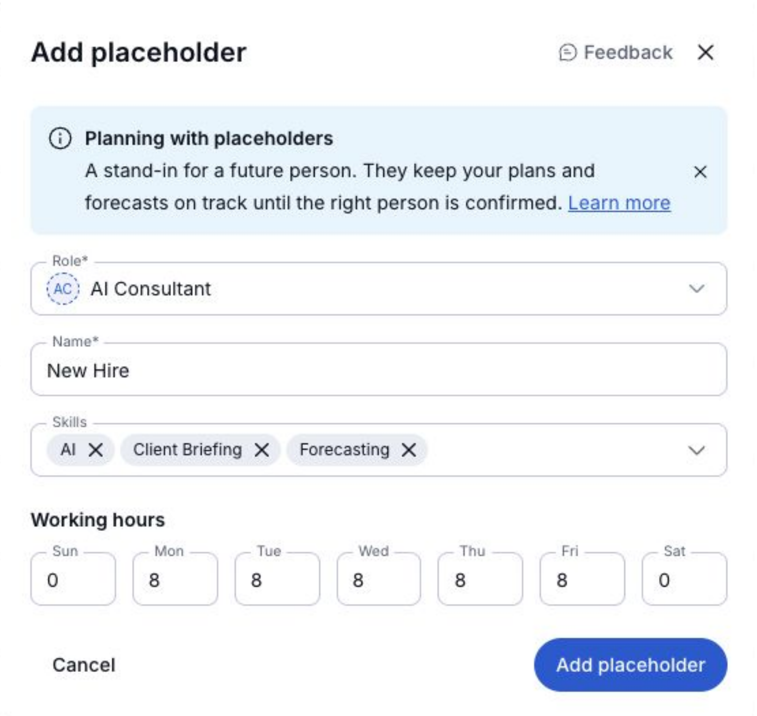
Plan resources

Placeholder users

Placeholders are going global!

Why you'll love it:

- Add the same placeholder across multiple projects
- Plan future hires more realistically
- Model project schedules before roles are filled
- Identify true headcount gaps earlier
- Schedule with working hours, cost & billable rates



Deliver Grow **Scale**

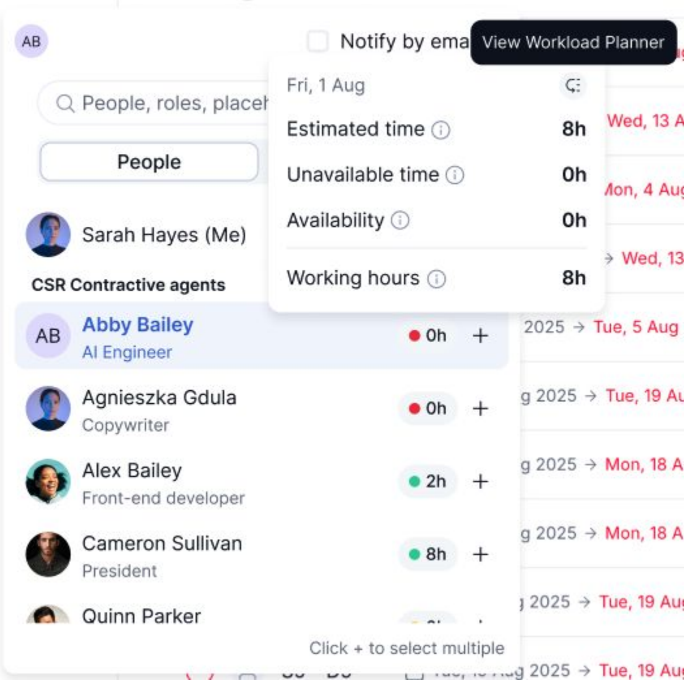
Status: ○ Live ● Coming Soon

Aligning Core and Planning Views

See who actually has capacity before you assign work, right where you're assigning it.

Why you'll love it:

- **Assign with capacity in view:** see each person's availability as you assign a task, so you're not guessing who has room.
- **Surface allocations and split capacity in task details,** showing who's working on on what and any linked allocations directly on the task.
- **Plan and deliver in sync,** closing the gap between your planning view and the work you're actually assigning.



Deliver Grow **Scale**

Status: ○ Live ○ Coming Soon

Service Lines

Service lines bring structure to how you manage the services you deliver to clients. Instead of tracking work project by project, you organize it around the services your business is built on, and see how each one is really performing.

Why you'll love it:

- **Manage your business by the services you deliver,** not just a list of projects, so revenue, hours, and margin roll up to the service level
- **Understand which services are worth investing in,** spotting where you're delivering profitably and where delivery is eating into margin

Total revenue
$412,600

Avg. margin
34%

Most profitable
SEO

Service line	Projects	Revenue	Billable hours	Margin	Trend
SEO	14	$128,400	1,240	42%	+6%
Paid media	9	$96,200	870	38%	+3%
Web development	11	$104,900	1,610	27%	— 0%
Creative and design	7	$54,300	690	24%	-4%
Content marketing	6	$28,800	410	18%	-7%

Deliver Grow **Scale**

Status: ○ Live ● Coming Soon

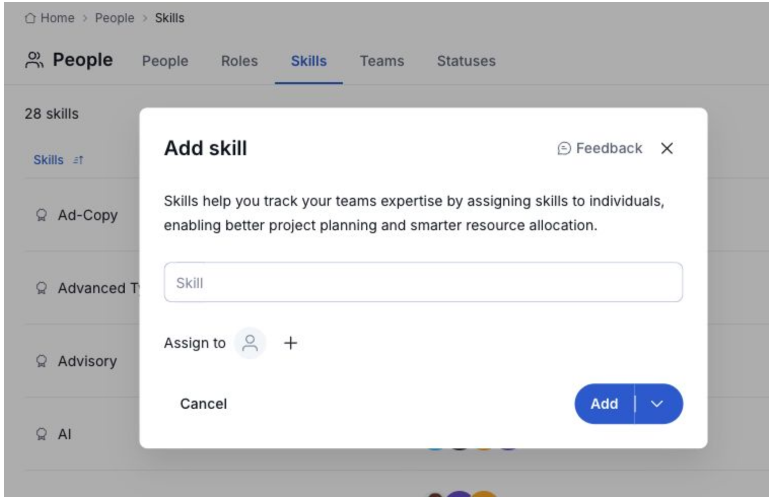
Skills matrix

Skills matrix

Assign work based on who's actually equipped to do it. The skills matrix will allow you to map skills and proficiency levels across your team, so the right people land on the right projects.

Why you'll love it:

- **Build a live view of your team's skills**, from design to development to client management, all in one place
- **Staff projects with confidence** by matching task requirements to people with the right skills and availability
- **Spot skill gaps early**, so you can plan hiring and training before they slow down delivery



Deliver Grow Scale

Status: ○ Live ● Coming Soon

Q3+ 2026

Make projects profitable

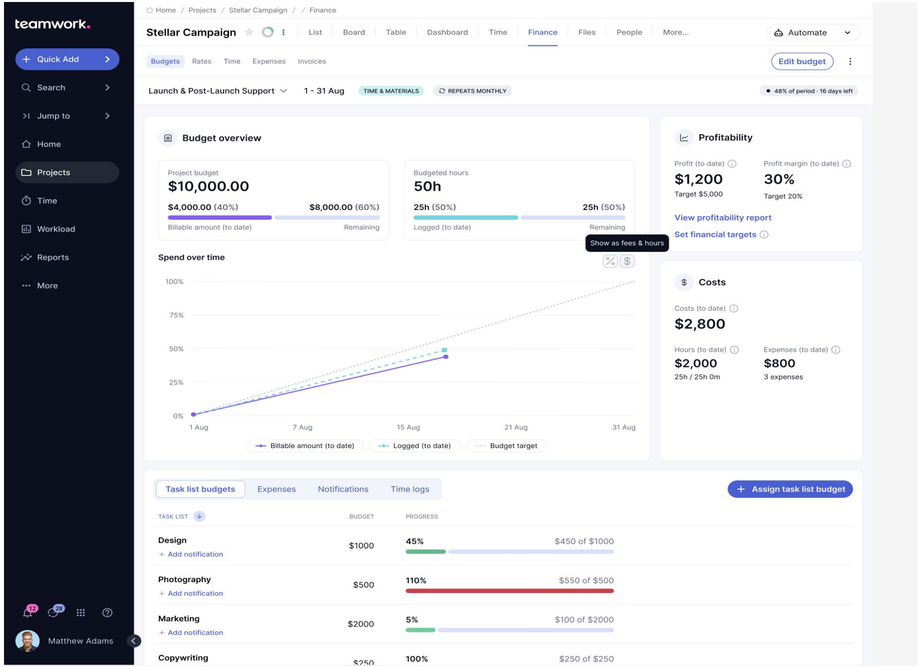
Brand new feature ✓ Enhancement

Dual Budgets

One project budget, tracking hours and fees at the same time.

Why you'll love it

- See hours and fees progress side-by-side, no more juggling two views
- No more splitting the picture between Teamwork and a spreadsheet
- One place to track the full financial picture of a project
- Time logged updates both targets automatically, no double entry



Deliver Grow **Scale**

Status: ○ Live ● Coming Soon

Brand new feature

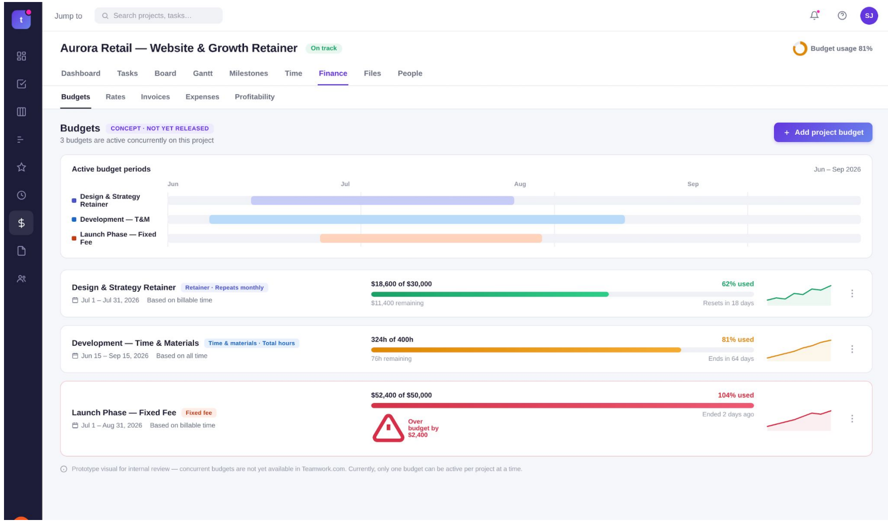
Enhancement

Concurrent Budgets

Run multiple budgets on the same project at the same time.

Why you'll love it

- Track separate budgets for different phases or workstreams, without one project's budget muddying another
- Keep each piece of work accountable to its own numbers



Deliver

Grow

Scale

Status: Live Coming Soon

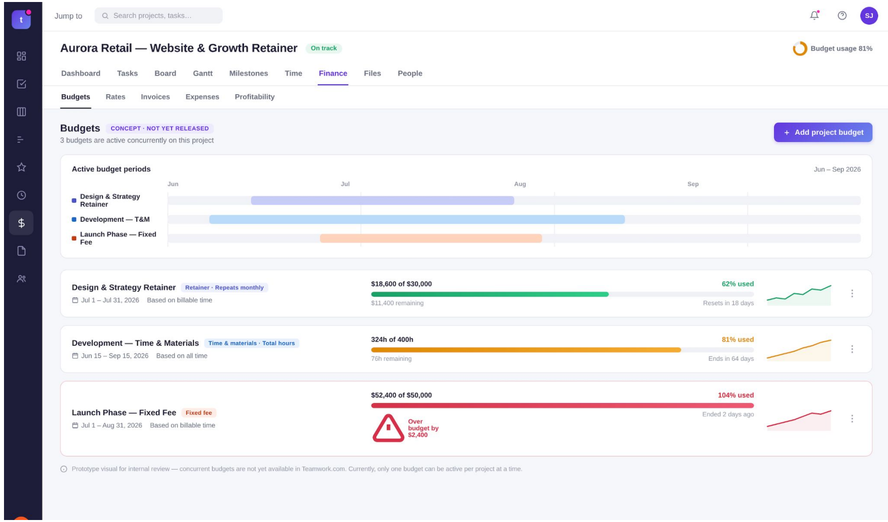
Brand new feature Enhancement

Sub Budgets

Break one budget down into smaller budgets underneath it.

Why you'll love it

- See spend and progress at a more granular level, per tasklist, milestone, or service line
- Roll everything back up into the parent budget for the full picture



Deliver Grow Scale

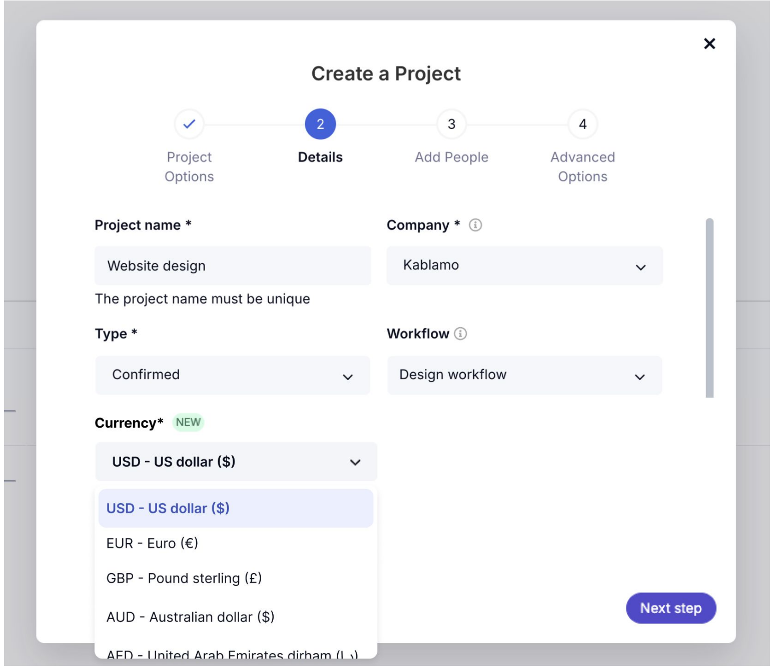
Status: Live Coming Soon

Project-level multi-currency

Give each project its own currency, even when they're under the same client.

Why you'll love it

- Choose the appropriate currency for each project, regardless of the client's default currency
- Support global clients more flexibly by managing projects in the currencies they actually operate in



Deliver Grow **Scale**

Status: ○ Live ● Coming Soon

Q3+ 2026

Track performance

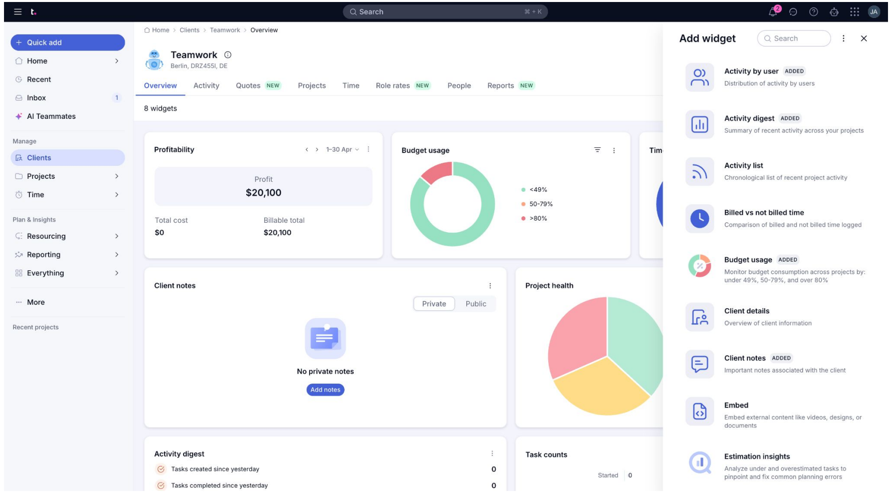
Brand new feature ✓ **Enhancement**

Client Overview dashboard

Understand client performance at a glance with a customisable dashboard in the Client Overview area.

Why you'll love it:

- Fully customisable dashboard, allowing to you to surface only the insights you need
- Chart layout options enable you to choose the correct layout for your data (table, pie chart, donut chart, etc.)
- Resizable widgets, giving you the power to build exactly the view you want!
- In-context drill downs, no more clicking around to get the info you need



Deliver Grow **Scale**

Status: ○ Live ● Coming Soon

Brand new feature

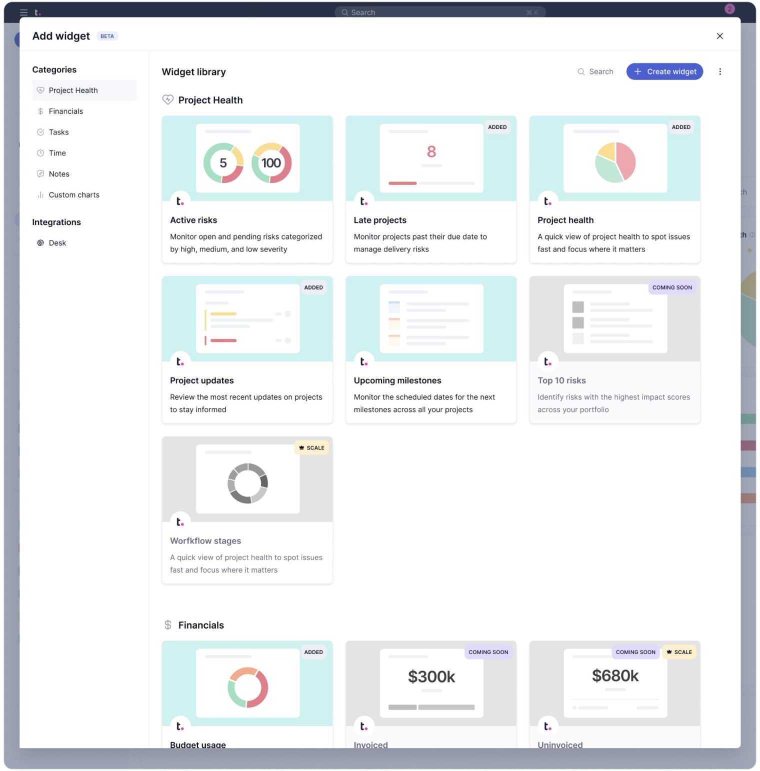
Enhancement

Custom dashboards

Build a dashboard with the information you need.

Why you'll love it:

- Each team member can create a dashboard with the information they need to get their work done
- Identify issues, risks, actions, and blockers at a glance by surfacing the information you need in one place
- Contextual drill-downs to go from insight to action on the spot
- Choose from a wide-ranging library of widgets across many data points



Deliver Grow **Scale**

Status: ○ Live ● Coming Soon

Thank You!

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