Product Roadmap

Q3 2025

Your host & speakers

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Product Marketing Manager

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Product Manager

teamwork.com

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

teamwork.com

Combining **powerful** project management and **streamlined** operations.

Profit from **every** client demand.

Agenda

- Recently released features
- Coming soon features
- And more
- Q&A

How to participate today

Q&A
Use the Q&A to ask your questions

Emojis
Use emojis to show us your reactions

Chat
Use the chat to say hello or leave a comment

Recording

We are recording and it will be emailed
in a few days - not to worry!

Q2 2025

Recently Released

Q2 2025

TeamworkAI

AI Comment Summarization

With just one click, instantly distill lengthy comment threads into concise, easy-to-digest summaries.
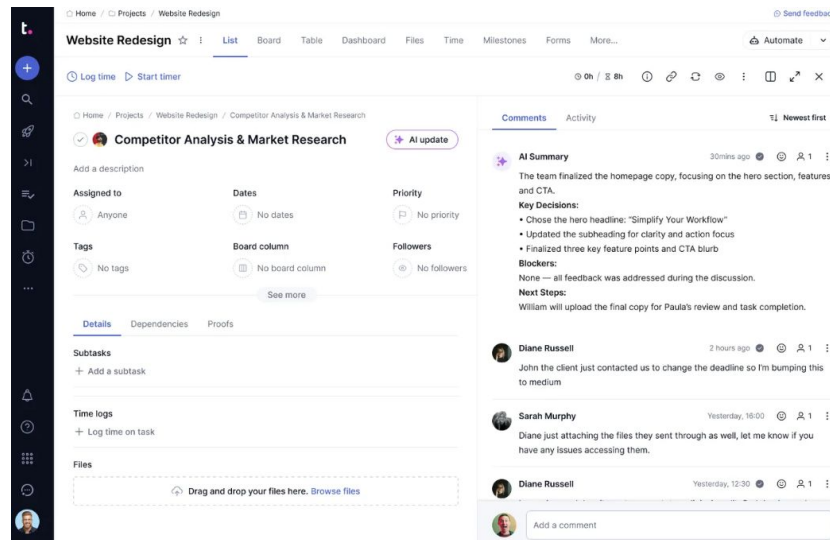
Why you'll love it:

- Cut through the clutter in complex discussions
- Get up to speed on the latest thread updates in seconds
- Keeping everyone aligned without the back-and-forth
- Ability to keep it private as your own personal recap

Deliver   **Grow**   **Scale**

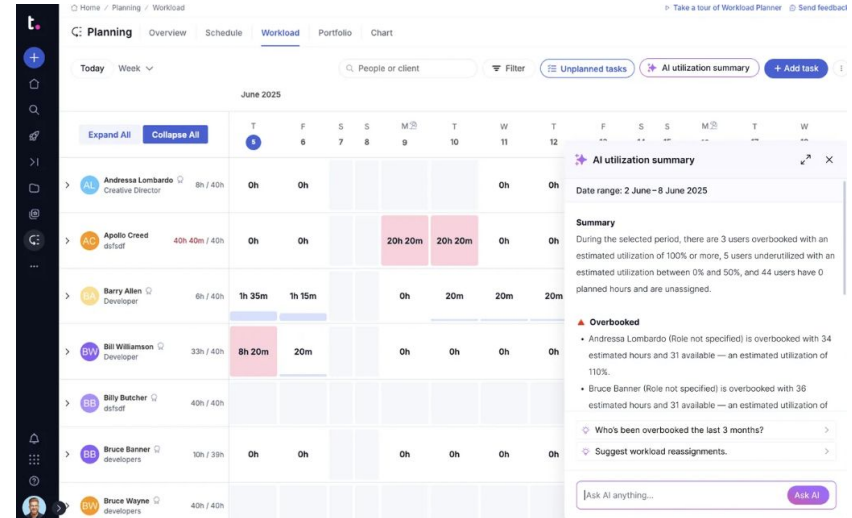**Status:** ● Live   ○ Coming Soon

AI Utilization Summary

Immediately discover which team members are over-capacity, underused, or unassigned.

Why you'll love it:

- Reassign work more effectively
- Spot gaps before they cause delays
- Optimize your resources for higher profitability

Deliver Grow Scale   **Status:** ● Live ○ Coming Soon

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AI Filter Assistant

Brings natural language filtering to Task List View, making it easier and faster to find exactly what you need with simple text input.
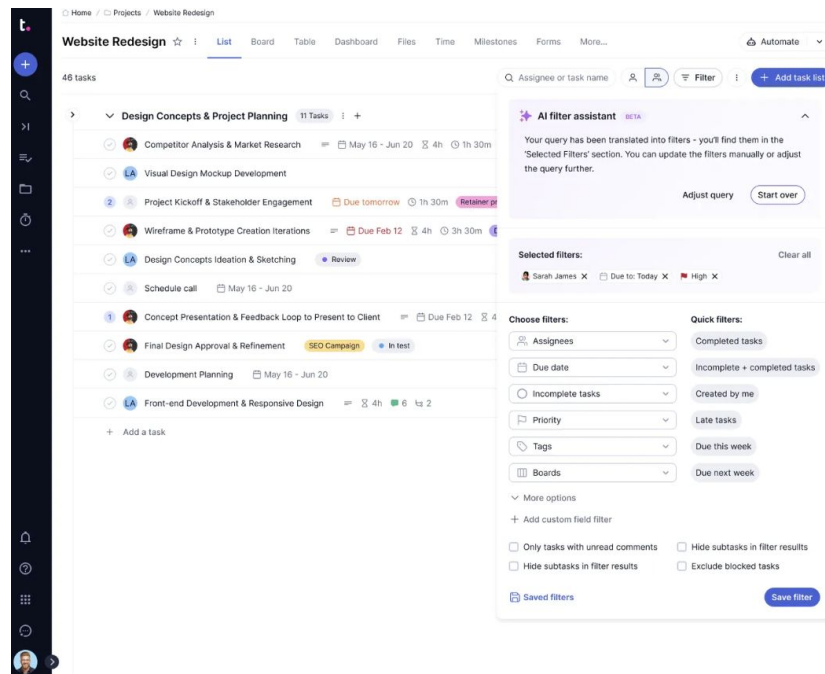
Why you'll love it:

- Cuts search time by removing clicks, dropdowns, and multi-step filters
- Speeds up onboarding, especially for new and occasional users
- Increases productivity by keeping you in your flow, surfacing the work that matters most

Deliver   **Grow**   **Scale**

Status: ● Live   ○ Coming Soon

AI Expense Autofill

Improved expense creation and management functionalities, while saving time along the way.

Why you'll love it:

- Just upload an attachment and TeamworkAI will auto-populate expense fields
- Save time and log expenses more efficiently
- Photo evidence validates the expense even further

Deliver   Grow   Scale

Status: ● Live   ○ Coming Soon

Add expense NEW   ⊙ Send feedback   ✕

✦ **Save time with AI** ⓘ BETA   Try AI autofill
Upload an image to autofill your expense

Budget period *   ⌄   📅 23 Apr 2025   ✕   SO +
                                Date *

$ Total cost *   ☐ Billable

Category *   ⌄

Title

Description

☁ Drag and drop your files here. Browse files
Max: 4 files | 100MB per file

Cancel   Save & add another   Add expense

Q2 2025

# Manage client work

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Outlook Calendar Sync

Seamlessly connect your Outlook calendar to Teamwork.com to automatically sync, update, and manage events and tasks—all in one place.

Why you'll love it:

- Plan your day more efficiently by visualizing your entire schedule in your My Calendar view
- Any changes made in Outlook are instantly reflected in Teamwork.com, ensuring your schedule is always up to date

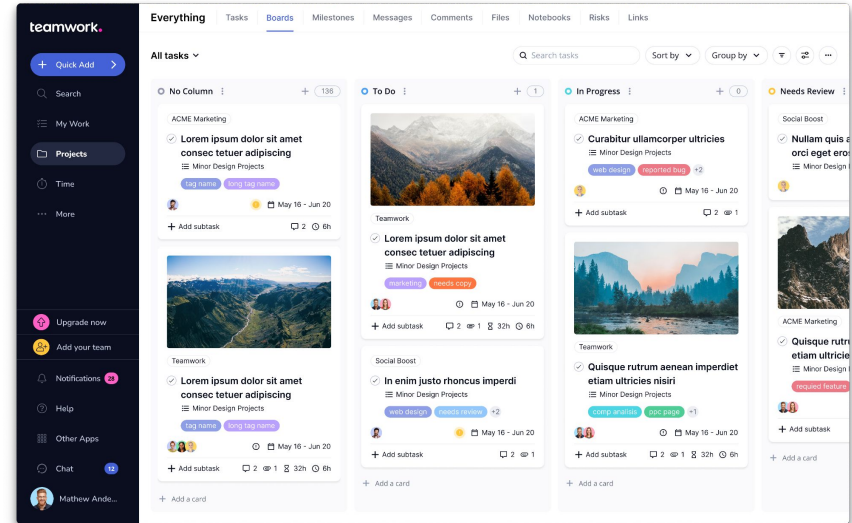**Deliver** **Grow** **Scale**

Status: ● Live ○ Coming Soon

teamwork**.**com
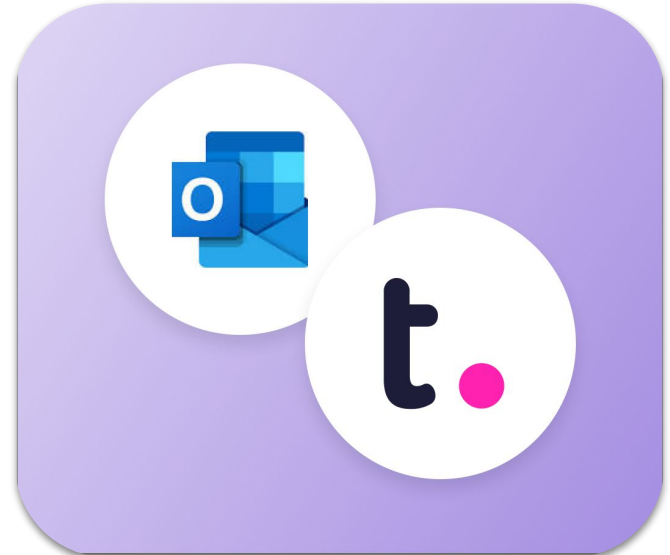
New Boards UI & Workflows

Improved consistency and visibility into your work across projects.

Why you'll love it:

- Create shared Workflows to ensure alignment in how your projects are run
- View task progress across Projects to understand the status of all of your work
- Integrated workflow automations to save you time and manual work
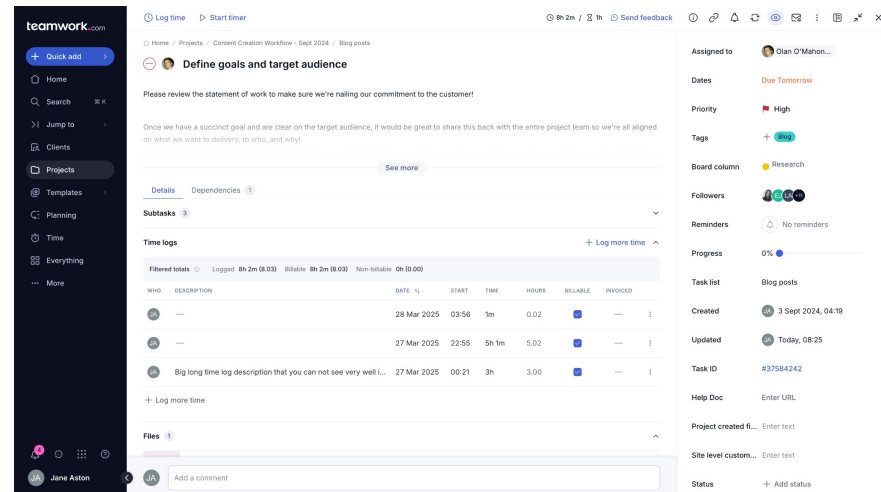

Deliver   Grow   Scale

Status: ⬤ Live   ⬤ Coming Soon

teamwork.com

Improved Task Details

An updated Task Details panel and full Task Details page across Teamwork.com for quicker, easier, and more consistent insights into your tasks!

Why you'll love it:

- Easier updating of tasks with inline editing (fewer clicks!)
- Choose from three new Task Details layouts, so you can focus on the task information that's most important to you
- Most meaningful information at your fingertips
- Consistency in how you view your tasks across Teamwork.com

Deliver   **Grow**   **Scale**

Status: ● Live   ● Coming Soon

Task and List View Improvements

We've been working on some advanced UX improvements to improve the experience with List View and Task Details!

Why you'll love it:

- Advanced "Add task" option to add all task info before hitting save
- Advanced subtask management and creation in Task Details
- Improved file experience, including more file info and shareable link
- Improved date interactions and day preview inline

Deliver   **Grow**   **Scale**

Status: ● Live   ● Coming Soon

teamwork**.**com
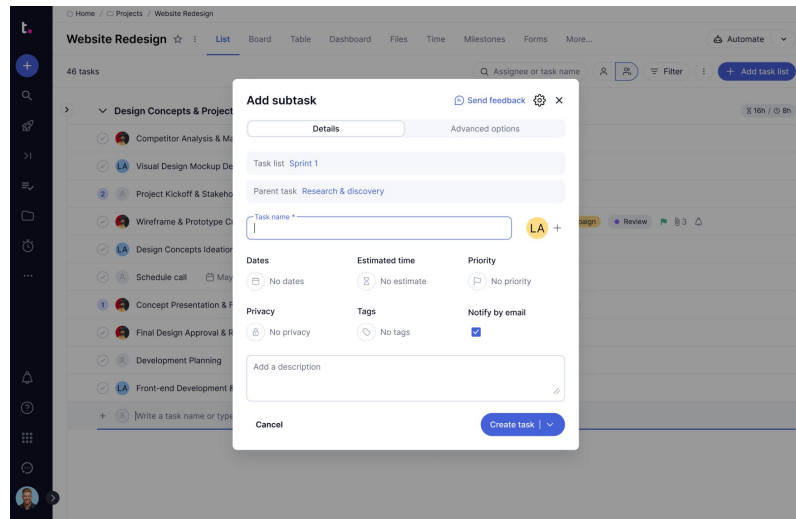
Required Project Custom Fields

Ensure essential data is captured upfront with required custom fields, streamlining project creation for a smoother, more structured experience.

Why you'll love it:
- Guarantees that critical project information is always captured
- Reduces cumbersome back-and-forth corrections, saving you time
- Standardized setup ensures smooth project creation across teams

Assign a custom field

| DOB | Enter a number | 🔵 Required |

| Require assistance? | Choose an option... ⌄ | ⚪ Required |

+ Add another custom field

Deliver **Grow** **Scale**

Status: 🔘 Live   ⚪ Coming Soon

teamwork.com

Dark Mode

Customize your interface experience and stay focused with our sleek, modern Dark Mode—designed for your comfort and efficiency.

Why you'll love it:

- Less strain, more comfort: Dark Mode reduces eye fatigue while you work
- Enhanced focus: A distraction-free experience for deep work
- Improved customization: View Teamwork.com the way you want!

Deliver   **Grow**   **Scale**

Status: ● Live   ○ Coming Soon

teamwork**.**com
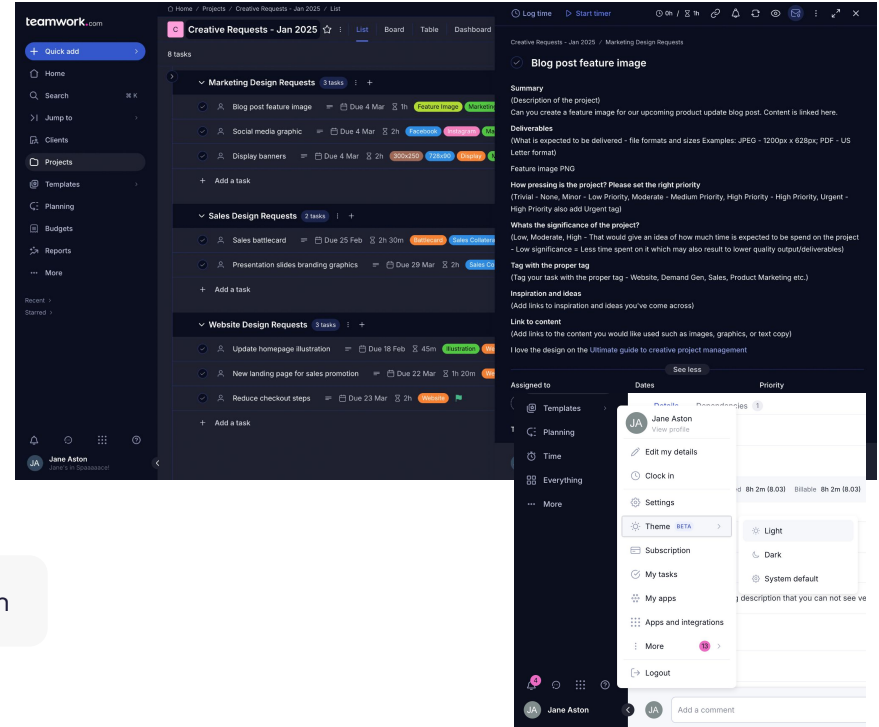
Desk Search Improvements

Search has gotten an uplift, making it easier to find the information you're looking for.

Why you'll love it:

- Additional filters allow you to narrow your search
- Improved advanced search page makes it easy to find the right information ASAP
- Improved recency showing the most relevant search results first
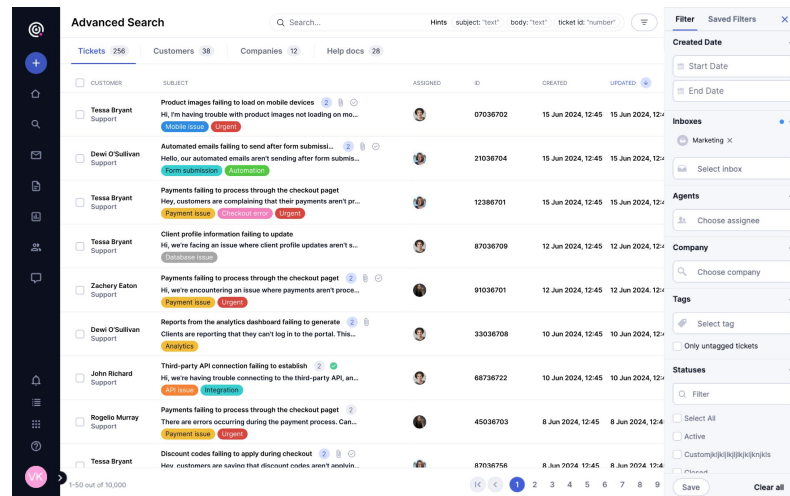
Starter **Pro** **Premium** **Enterprise**

Status: ⬤ Live ◯ Coming Soon

@.Desk

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Plan resources

Skills

Introducing Skills to Planning views! Assign the right people to the right work based on their strengths, experience, and expertise

Why you'll love it:

- Plan for the resources you need by skill - Match the right people to the right work
- Reduce time spent manually searching for the best fit and ensure optimal resource utilization
- Gain a clear overview of your team's skills, making it easier to fill gaps and plan for future needs
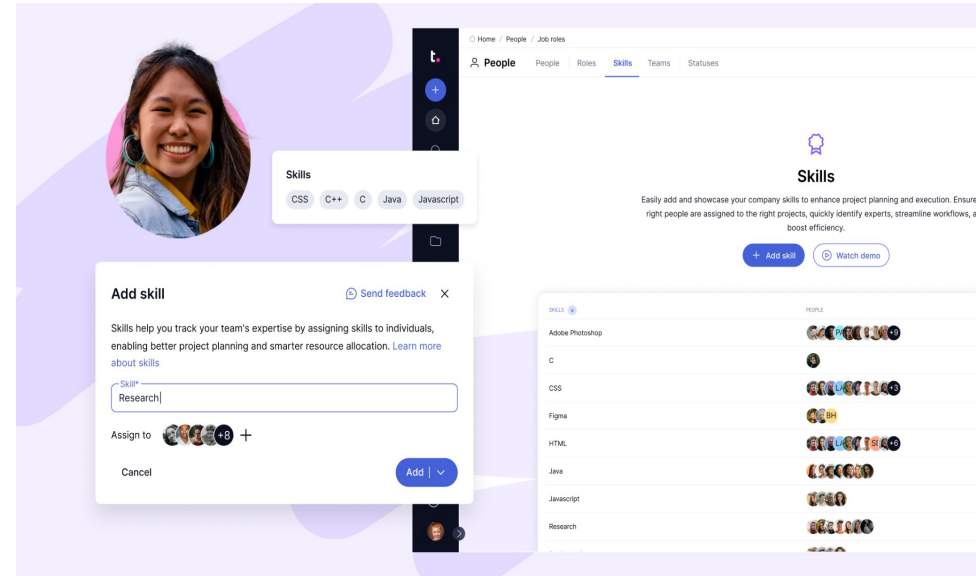
Deliver   **Grow**   **Scale**

Status: ● Live   ○ Coming Soon

Time Off

Managing regional public holidays for your entire company just got easier!

Why you'll love it:

- Time off is automatically factored into team availability, helping you plan work around real time off
- Apply regional holidays to the whole company or to specific teams based on their location

Deliver   Grow   **Scale**

Status: ● Live   ○ Coming Soon

teamwork.com
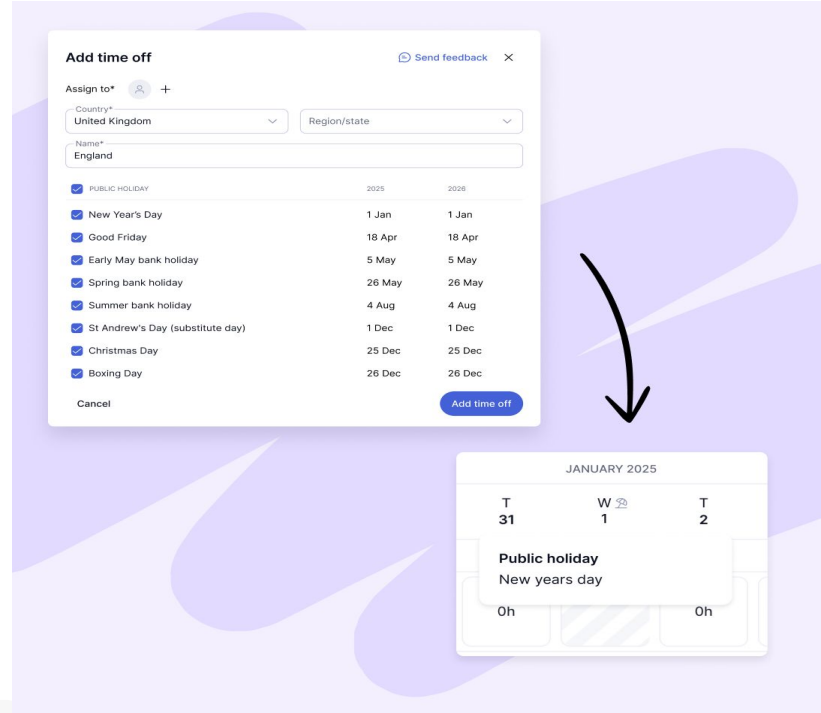
Unavailable Time

Managing unavailable time across your organization is now simpler and more intuitive than ever.

Why you'll love it:

- A refreshed UX means it's faster and easier to schedule unavailable time, with fewer clicks and a more intuitive flow
- Apply unavailable time at scale across your whole company or just to selected teams
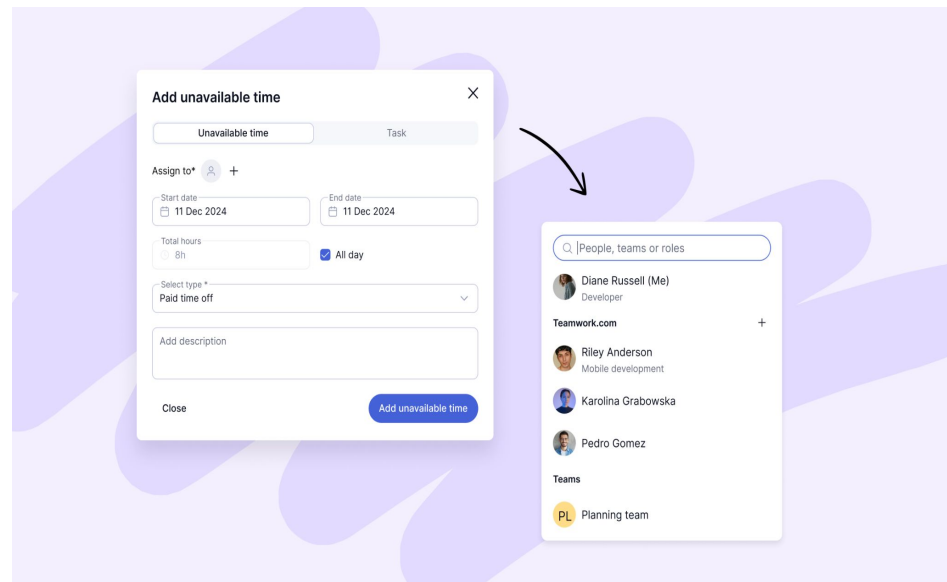
Deliver Grow Scale   Status: ● Live ○ Coming Soon

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Make projects profitable

teamwork**.**com

Quotes

Easily create and edit quotes/estimates for client work

Why you'll love it:

- Lots of flexibility and configuration options
- Build time and materials or fixed fee quotes
- Optional discounts and tax applications
- Freedom to create the exact line items you need for each quote; time, services, expenses etc.
- **Coming soon:** Use templates to create Quotes and convert accepted quotes to Projects/Tasks and more

Deliver   Grow   Scale

Status: ⬤ Live   ◯ Coming Soon

teamwork**.**com

NetSuite Integration

Easily sync time logs from Teamwork.com to NetSuite in real time, eliminating manual data entry and ensuring accurate invoicing.

Why you'll love it:
- No more exporting/importing time logs manually
- Syncs instantly when time logs are created and updated
- Ensures financial teams have up-to-date project data
- For teams that need seamless project-to-finance workflows

Deliver   Grow   **Scale**
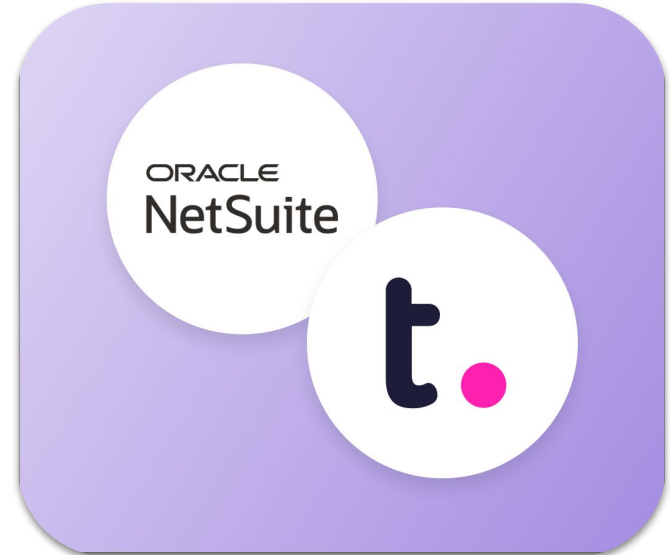
Status: ● Live   ○ Coming Soon

teamwork**.**com

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Track performance

teamwork.com

Custom Report Charts

Now you can turn any custom report into a visual dashboard with charts, making it easier to spot trends and communicate results at a glance.

Why you'll love it:

- Use bar and line charts to visualize key metrics
- Add up to three visible charts to each custom report (and keep two on standby)

Deliver   Grow   Scale   **Status:** ● Live   ○ Coming Soon

teamwork.com
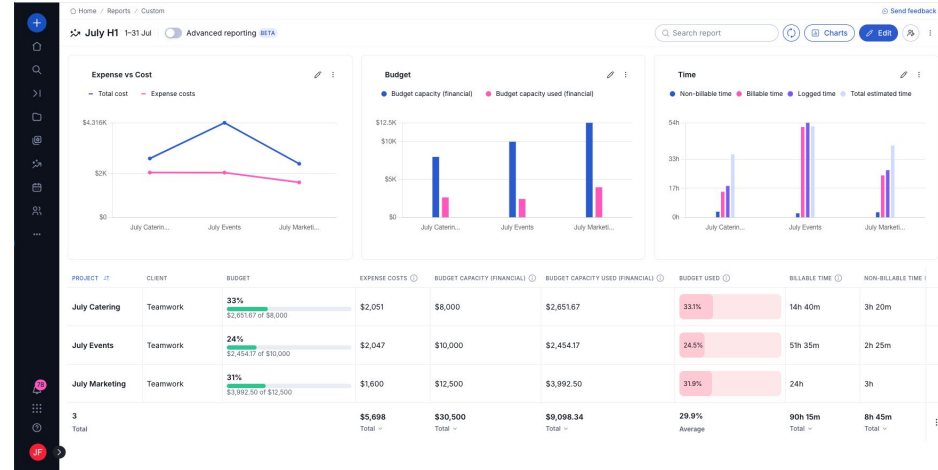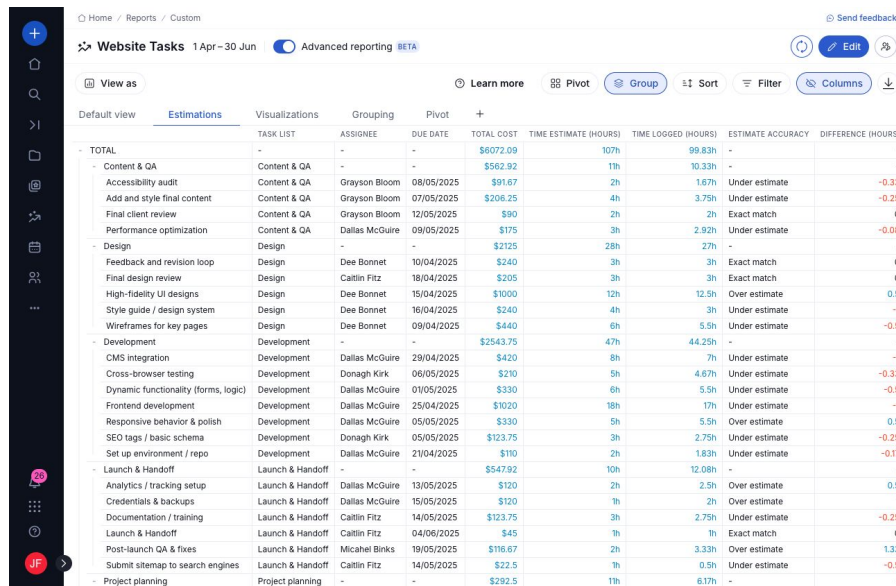
Advanced Reporting

Gain deeper insights thanks to custom expressions and flexible options, helping you manage how your data is displayed.

Why you'll love it:

- Create custom calculations using expressions to generate new data points
- Build pivot tables or group your data in the way that best highlights the information you want to showcase
- Choose from custom aggregation methods to tailor how your data is totalled

Deliver Grow **Scale**

Status: ● Live ○ Coming Soon

teamwork.com

Advanced Formulas

Create tailored calculations using a wide range of functions, fields, and operators—unlocking a whole new level of reporting precision.

Why you'll love it:

- Access deeper insights from your reports without needing to export to spreadsheets
- Build powerful formulas using a broad range of functions, fields, and logical operators.
- Get inspired with built-in examples that show exactly how to apply formulas to your data

Deliver **Grow** **Scale**

Status: ● Live ○ Coming Soon

teamwork.com

Track Trends

Now available in the Utilization Report, Track Trends lets you compare performance over time, so you can catch shifts early and stay on target.

Why you'll love it:

- Compare data across key timeframes like DoD, WoW, MoM, and QoQ
- Select a specific metric like Total Utilization or Billable Time to track changes over time
- Uncover trends directly in Teamwork.com without exporting to Excel
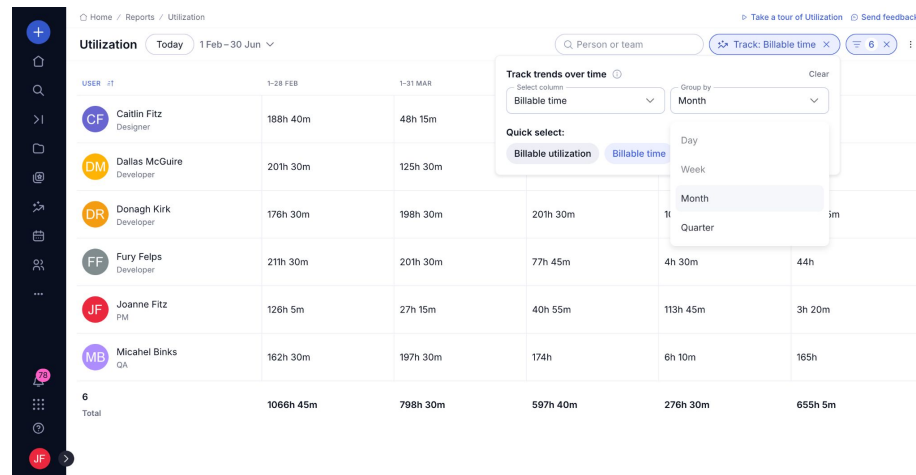
Deliver   **Grow**   **Scale**

Status: ⦿ Live   ◯ Coming Soon

teamwork**.**com

Q3+

Coming Soon

teamwork**.**com

Q3+ 2025

TeamworkAI

AI Project Builder

Automatically generate a new project with details like name, description, and tags—all based on a few prompts.

Why you'll love it:

- Simply paste in the details of your project brief
- TeamworkAI puts together the project structure, including tasks and task lists
- Stay in control by reviewing and editing any details as needed
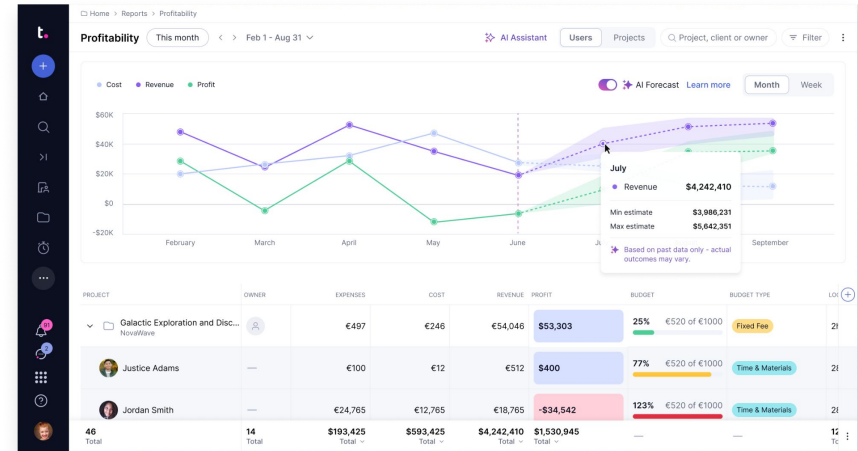

Deliver **Grow** **Scale**

Status: ◯ Live ● Coming Soon

teamwork**.**com
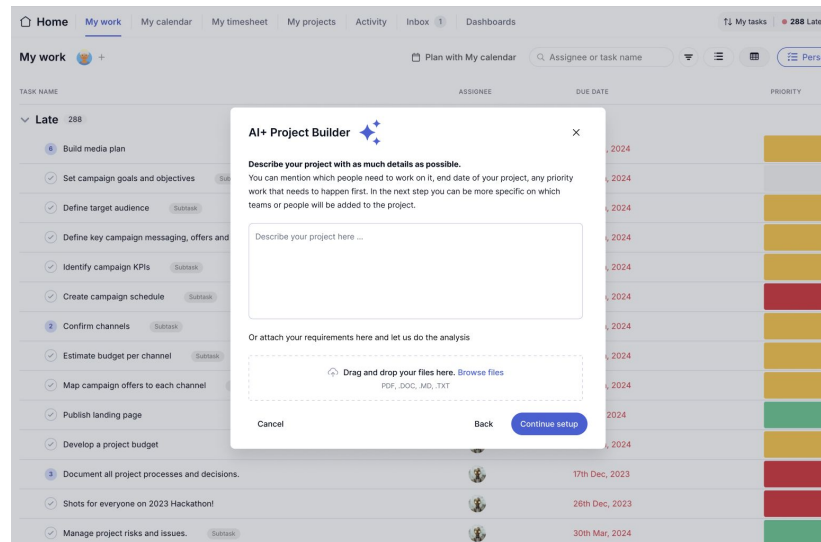
AI Forecasting

Take the guesswork out of planning with AI-generated forecasts for revenue, cost, and profit within the Profitability Report, all based on your historical data.

Why you'll love it:
- Whether you're aiming to grow or stay on track, AI Forecasting helps you anticipate what's ahead
- Spot projected trends in revenue, cost, and profit - so you're never caught off guard
- Act early with AI-powered insights into upcoming risks and opportunities
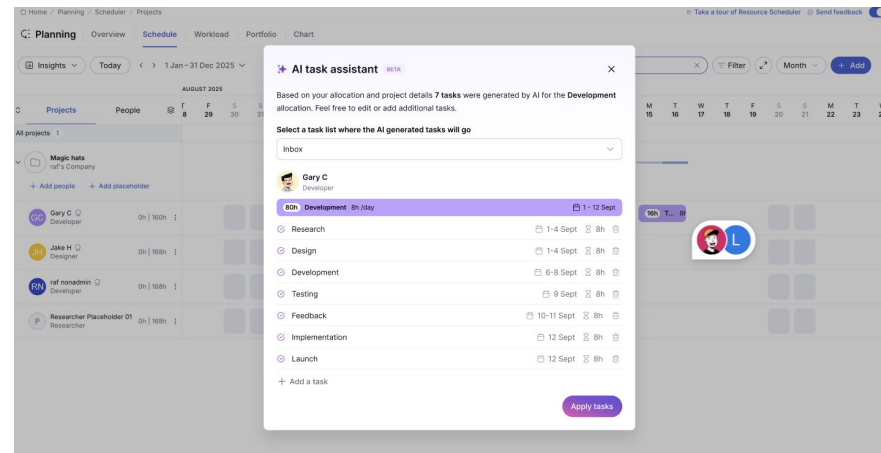

Deliver   Grow   **Scale**

Status: ○ Live   ● Coming Soon

AI Smart Scheduler

Transfer allocations from placeholders to users, then auto-generate tasks associated with those allocations.

Why you'll love it:

- Auto-assign work based on availability, roles, and timelines of allocations to give you the best people for the job in seconds
- Auto-generate tasks based on allocation to instantly populate within the Workload Planner
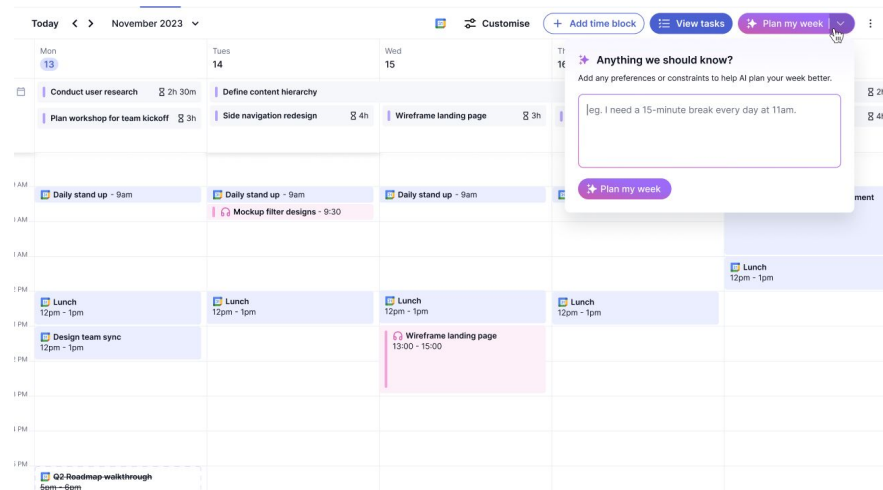

Deliver **Grow** **Scale**

Status: ◯ Live ⬤ Coming Soon

teamwork.com

AI Calendar

Automatically convert assigned tasks into calendar time blocks, creating a complete weekly plan based on task priority, start date, due date, and estimated time.

Why you'll love it:

- Transforms scattered task lists into organized, actionable daily schedules
- Adapts to changing priorities and commitments
- Works around existing calendar meetings

Deliver **Grow** **Scale**

Status: ○ Live ● Coming Soon

Q3+ 2025

Manage client work

teamwork.com

New Table View Experience

An improved Table View experience for My Work and Projects Task Table View.

Why you'll love it:

- A beautiful new Table View with swift cell interactions
- Improved consistency with our other task views
- Introducing new functionality (such as "Group by") to allow us to group by task attributes outside of Date and Task List

Deliver   **Grow**   **Scale**

Status: ◯ Live   ⬤ Coming Soon

Salesforce Sync + Mapping

A seamless, real-time data sync between Salesforce and Teamwork.com — ensuring consistent project visibility and field mapping support.
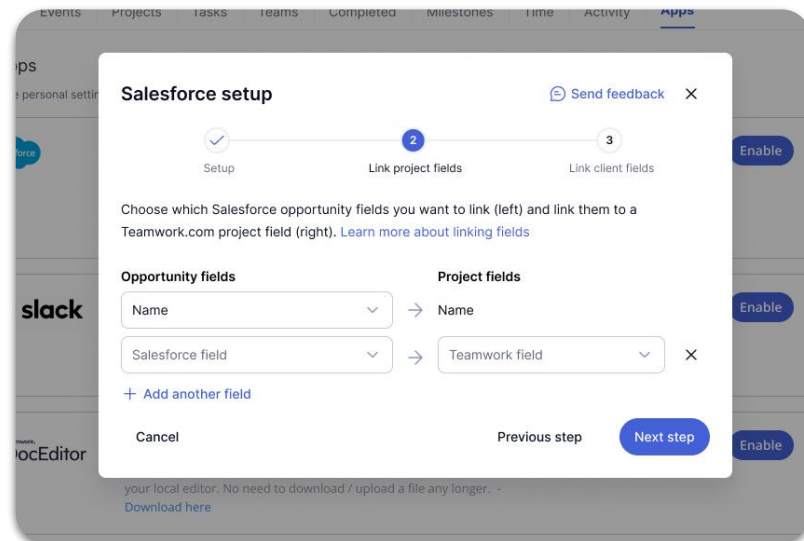
Why you'll love it:

- Reduce manual work with an automated data sync between Salesforce and Teamwork.com
- Ensure accurate, real-time project visibility across systems
- Eliminate silos with swift, consistent updates

Deliver **Grow** **Scale**

Status: ◯ Live ● Coming Soon

Salesforce setup interface showing steps: Setup ✓, Link project fields (2), Link client fields (3). "Choose which Salesforce opportunity fields you want to link (left) and link them to a Teamwork.com project field (right). Learn more about linking fields"

Opportunity fields — Name / Salesforce field → Project fields — Name / Teamwork field

+ Add another field

Cancel   Previous step   Next step

teamwork**.**com

New Gantt Chart

Introducing a new and improved Gantt to plan smarter, visualise task better & deliver projects faster!

Why you'll love it:
- Faster & smother interactions with instant responsive drag & drop.
- Client-ready exports with polished PDFs
- Enhanced clarity with improved task visibility, milestone tracking & custom colour coding.
- The gantt you have been waiting for to make better informed decisions
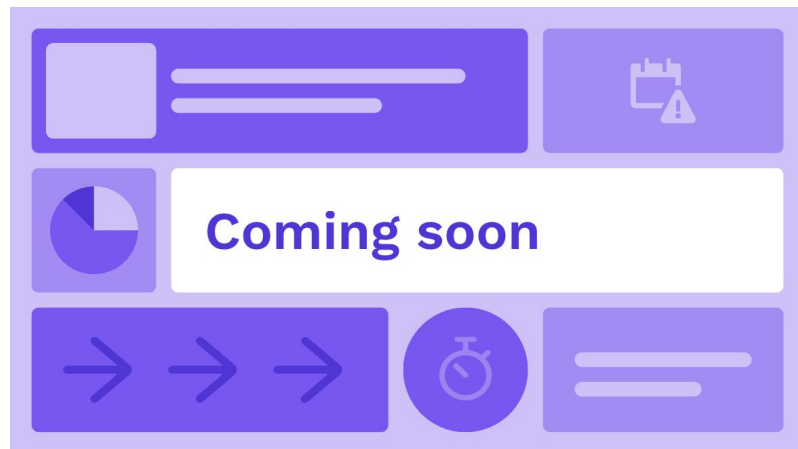
Coming soon

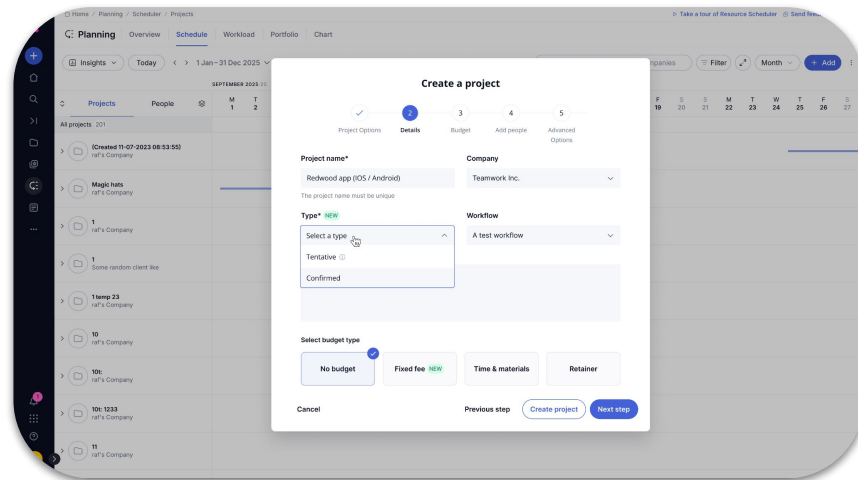**Status:** ◯ Live ⬤ Coming Soon

Plan resources

Tentative Projects

Allows you to map out work before it's confirmed. Plan with flexibility, explore ideas, and prepare your team without committing to timelines or resources.

Why you'll love it:

- Lets you hold capacity for likely work, helping you forecast with confidence before a deal is closed
- Easily convert a tentative project into a confirmed one with all of your planning carried across
- Keeps tentative work visible only to the right people without cluttering you team's view

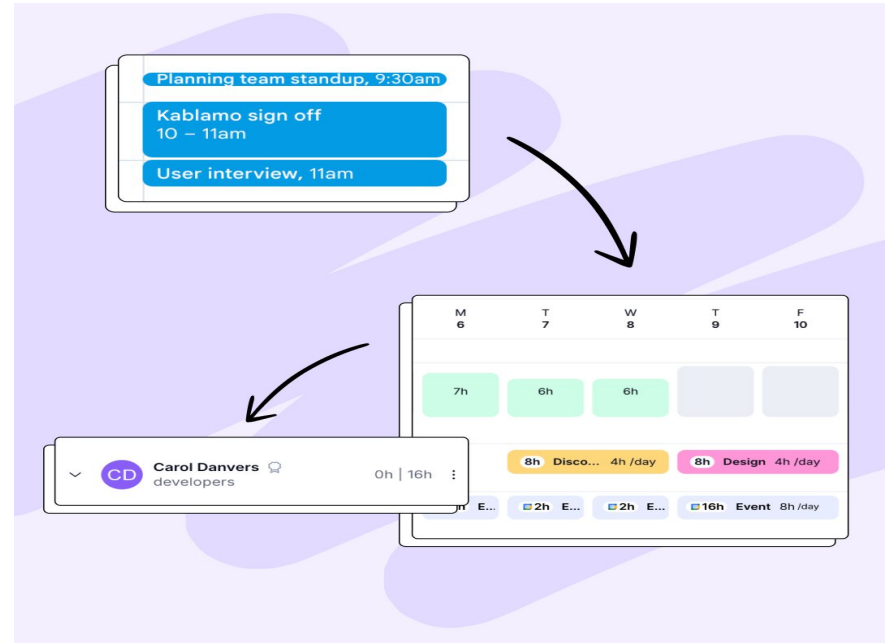**Deliver**   **Grow**   **Scale**

Status: ◯ Live   ⬤ Coming Soon

Gcal in Planning Views

Your team's commitments are now factored into their availability, giving you a more accurate view of capacity when scheduling work.

Why you'll love it:

- Meetings and OOO time from Gcal are now reflected in real time
- Avoid double-booking by seeing the full picture of your team's capacity
- Plan confidently with availability that actually reflects real-world capacity
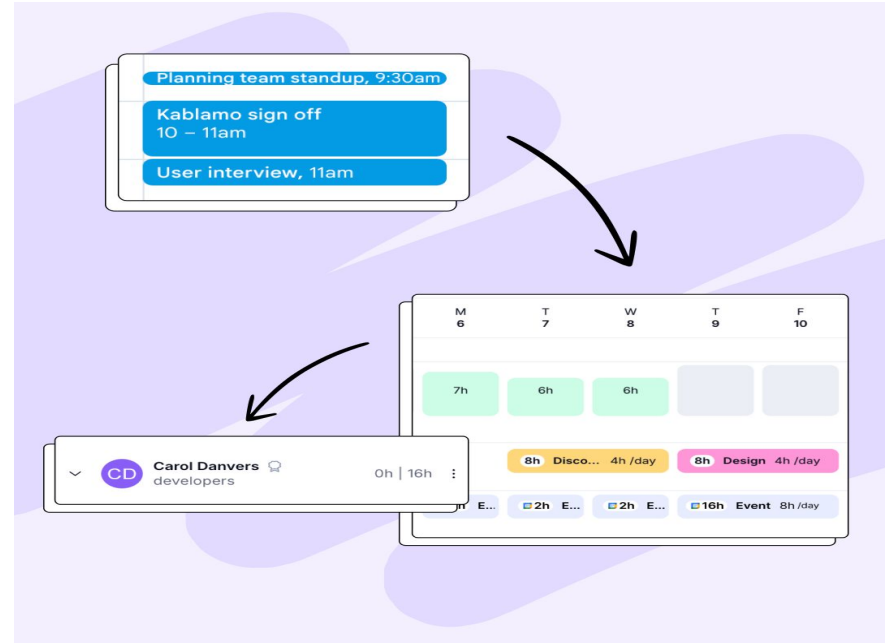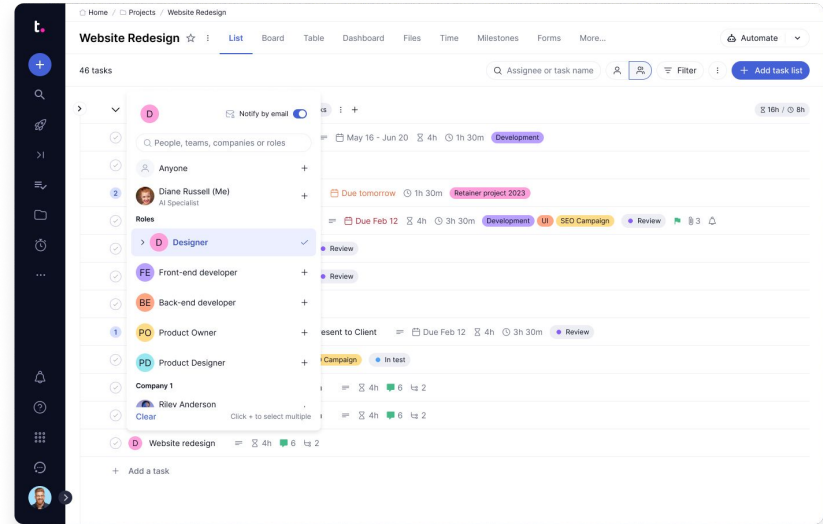

Deliver   Grow   **Scale**

Status: ◯ Live   ● Coming Soon

teamwork.com

Outlook in Planning Views

Your team's commitments are now factored into their availability, giving you a more accurate view of capacity when scheduling work.

Why you'll love it:

- Meetings and OOO time from Outlook are now reflected in real time
- Avoid double-booking by seeing the full picture of your team's capacity
- Plan confidently with availability that actually reflects real-world capacity

Deliver Grow Scale

Status: ○ Live ● Coming Soon

teamwork.com

Assigning Tasks to Roles

Plan out your client work by Role in Projects or Tasks to make the transfer of work to named resources smoother than ever!

Why you'll love it:

- Flexible project planning based on Role before needing to know exactly 'who' will complete the work
- Plan repeatable work in Templates based on Roles to save time down the line
- Quickly find the best resource to complete the work based on their Role

Deliver   **Grow**   **Scale**

Status: ○ Live   ● Coming Soon

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Q3+ 2025

Make projects profitable

teamwork.com
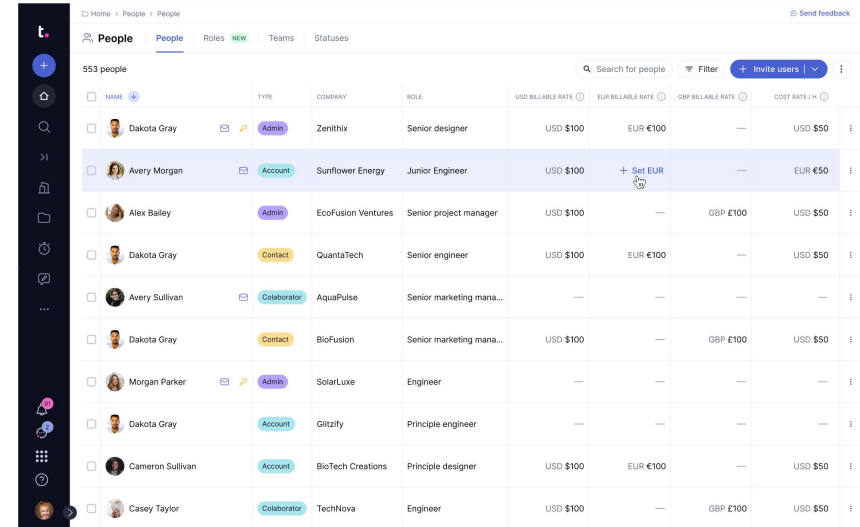
Multi-currency

Official support for those that need to bill clients in a currency that's different from your installation's default

Why you'll love it:

- Create 1:1 relationships between new clients and their applicable currency
- Set specific billable rates for those currencies to ensure maximum profitability for each circumstance
- Set cost rates in the currency(ies) your employees get paid in and we'll convert where applicable
- Create expenses, quotes, invoices and more in the correct currency for each client
- Centralised reporting in your default currency
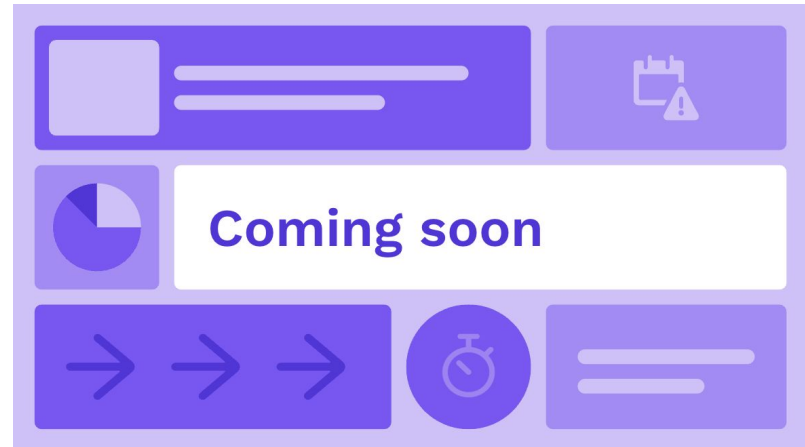

Deliver Grow **Scale**

Status: ○ Live ● Coming Soon

Role-based Rates

Set and manage rates for each and every role in your organization

Why you'll love it:

- Set representative cost rates for each role to assist in project planning and profitability forecasting

- Set specific billable rates for each role in your organization to elevate your planning game (with placeholder roles) and ensure easy to manage, more accurate billing practices.

- Enjoy increased flexibility with the ability to choose the preferred rate type to suit any situation; individual rates, role rates, custom project rates or a hybrid if the case demands it
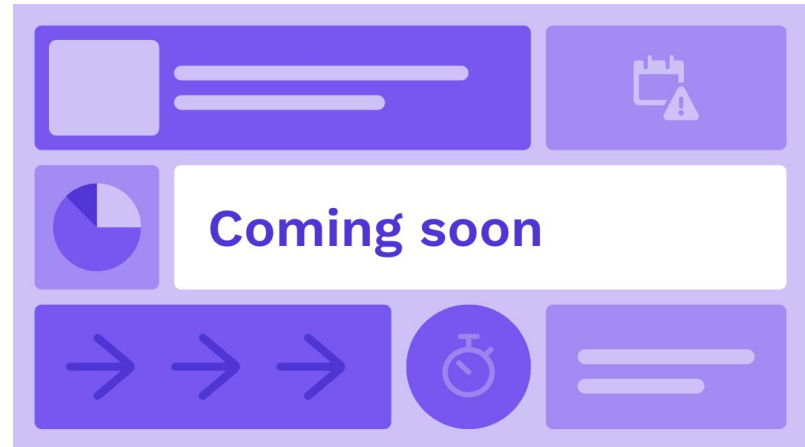
Coming soon

Deliver   Grow   **Scale**

Status: ◯ Live   ⬤ Coming Soon

teamwork.com

Time Approvals V2

More effectively and efficiently review, manage & approve your peoples' timesheets to ensure the correct balance of billable client work

Why you'll love it:

- **Less clutter, more clarity:** The capability to only see, review and approve only the timesheets for those that report to you

- **Timesheet locking:** You'll soon have the option to lock the timesheets you've already approved to prevent further unwanted amendments

Coming soon

Deliver　Grow　**Scale**

Status: ◯ Live　🟢 Coming Soon

teamwork.com

Track Ticket Time in Teamwork.com

Time logging in Teamwork Desk is getting a major upgrade. Quickly see when time is billable and move time entries to Teamwork.com for a complete and accurate view of all time spent on client communication.

Why you'll love it:

- Enhanced UX in Desk
- Time logs are Teamwork.com-specific, not product-specific
- Log time on behalf of others
- Automatic time logging to Projects based on ticket, linked task, or client

Pro **Premium** **Enterprise**

Status: ○ Live ● Coming Soon

Time 🕐 6h

☐ WHO BILLABLE TIME

Project A 🕐 1h 30m

ER $ 1h 30m

ER $ 2h 30m

GA — 30m

ER — 30m

Log time

Log time 💬 Send feedback ⚙ ✕

Log time to

Ticket only	Linked task	A project ✓
Log time spent on this ticket only	Log time to a linked task on this ticket	Log time on a project in Teamwork.com

Date

28 Jul 2023 ⌄ ER +

Project*

Select project ⌄

Task

Select task ⌄

Hrs spent*   **Mins spent***

1   0   ☑ Mark as billable

2h 1h 45m 30m 15m

Description

https://digitalcrew.staging.teamwork.com/desk/tickets/87041738
Fixing incorrect link redirections within the website's footer to ensure users are directed to the intended pages.

Cancel   Save & log another   Log time

@●Desk

teamwork.com

Q3+ 2025

Track performance

teamwork.com

Utilization Chart

Gives you a clear, visual snapshot of how your team is performing against their billable targets at a glance.

Why you'll love it:

- The green dashed line shows your billable target, so you can immediately see whether you're meeting, exceeding, or falling short.
- Compare actual hours worked (blue) with estimated hours (pink) to track how plans align with reality.
- Data-driven decisions: Use this visual to support conversations around workload, forecasting, or the need for additional support.
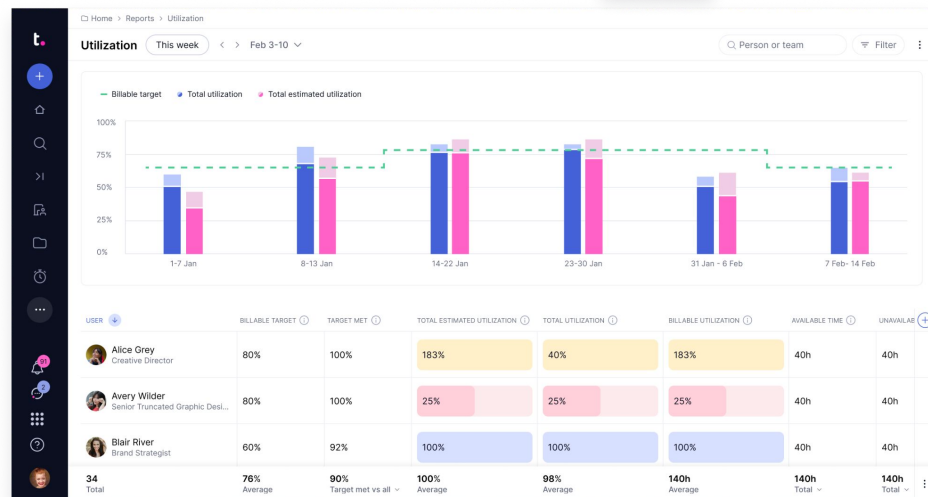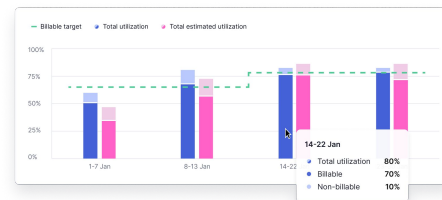
Deliver   **Grow**   **Scale**

Status: ○ Live   ● Coming Soon

Advanced Filtering

Get more control over how data is surfaced in your custom reports.

Why you'll love it:

- Combine conditions like "is," "is not," "is between," "is after," and more to zero-in on the data you need
- Use AND/OR logic to group filters and create powerful, flexible rule sets that match your reporting needs
- Instantly surface insights without needing to open a spreadsheet

Custom report builder

Report name*
Revenue per teams

Type
📁 Project

Date and filters
◀ ▶ Dec 2023 ▾ [☰ 4 ✕]

Columns*
⠿ $ Revenue ✕
⠿ 👤 Team ✕
➕ Add column ▾

Show summary row ⓘ

Permissions
Admins ⓘ Can view and edit
👥 Can view

Preview All numerical cells in this preview report contain sample data.

Revenue per teams

Filters Applied 4 Saved 6 Save filters Clear all

Where
Where | Project ▾ | Is ▾ | Completed | 🗑
OR ⇄ | Start date ▾ | Is after ▾ | 📅 31 Jul 2025 | 🗑
OR | Budget ▾ | Is between ▾ | 5,000,000 - 10,000,000 | 🗑
➕ Add filter to a group

OR ⇄ | Tags ▾ | Is any of ▾ | Retainer EMEA ▾ | 🗑
➕ Add filter to a group

➕ Add filter

Product Innovation, Prototyping,... | $94,000 | Engineering
12 Total | $956,203.00 Total | 6 Total

Status: ○ Live ⬤ Coming Soon

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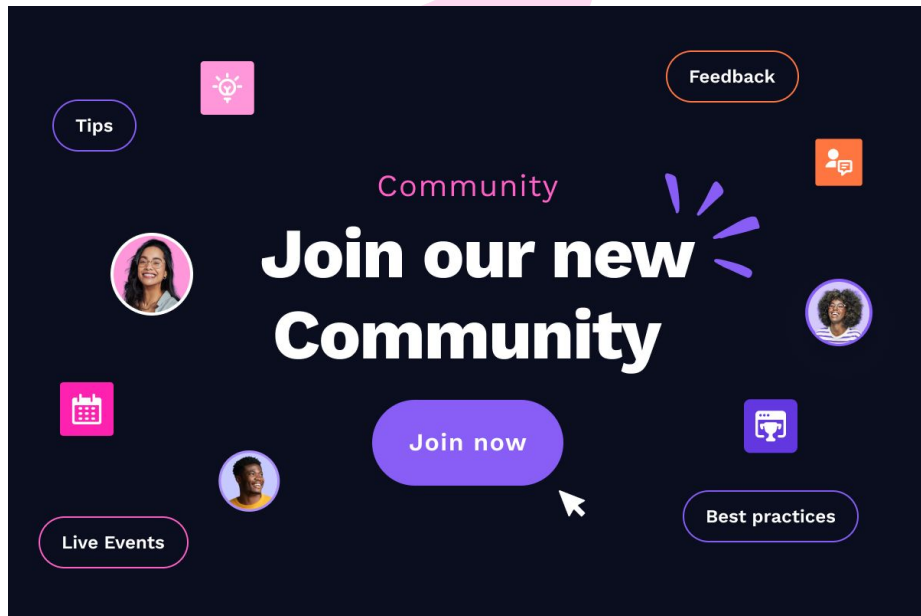
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Upcoming Webinars

Live Webinar

August 5
8:00am PT / 11:00am ET / 4:00pm GMT+1

5 Tips + Tricks:
Resource Management

Jennifer Delahooke
Customer Success Manager

Helen Chen
Customer Education Manager
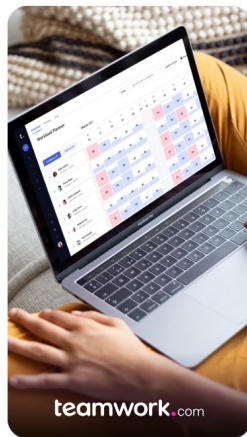
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Live Webinar

August 6
8:00am PT / 11:00am ET / 4:00pm GMT+1

Mastering Financials
in Teamwork.com

Andrew Parks
Customer Solutions Manager

Renee Demaree
Customer Success Manager

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Upcoming Webinars

Live Webinar

August 12
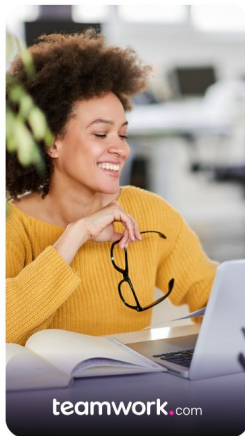8:00am PT / 11:00am ET / 4:00pm GMT+1

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Andrew Parks
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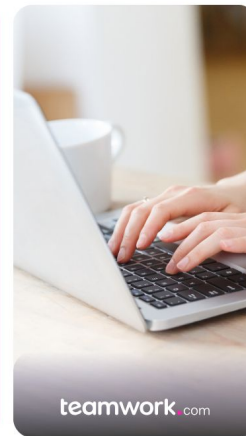teamwork.com

Live Webinar

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Q & A

Thank You!

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