

teamwork.

# Product Roadmap Q3 2021

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# Your hosts

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**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.**

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YOUNITY / WIRZ



*Salted Stone*



PayPal



Capgemini 

Disney

# Agenda

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- Product Direction
- Recently Released Features
- Coming Soon
- Sneak Peak: Scale Plan
- 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 interface element titled "Questions". It features a large empty text area for input, a smaller input field at the bottom containing the placeholder text "[Enter a question for staff]", and a "Send" button located at the bottom right corner of the form.

# Product Direction

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Project  
Planning

Resource  
Management

Improve  
capability

Project  
Management

Improve UX

Reporting

- Efficiency
- Profitability
- Utilization

Build out  
Capability

Product Roadmap

# Recently Released Features



# 'Add Project' Flow

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Streamlined, step-by-step flow makes it easier than ever to add a new Project

## Overview:

- Project Templates at your fingertips
- Simplified flow for faster Project creation
- Key project features readily accessible

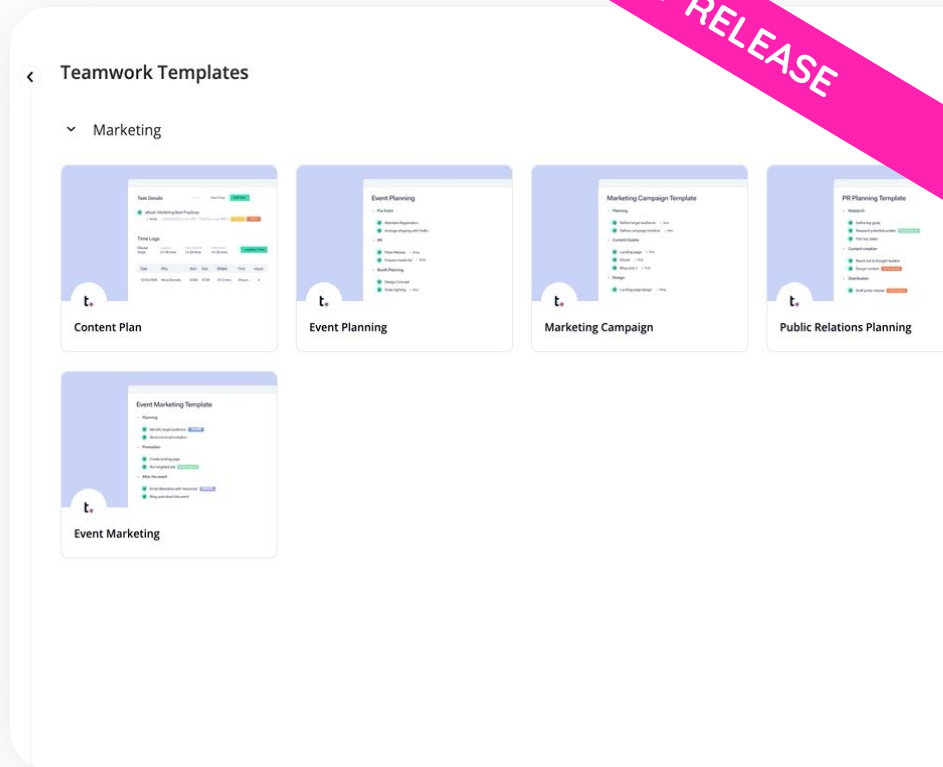


# Templates Gallery

Improved experience for viewing, managing and using Project Templates

## Overview:

- Simplified “Add Template” flow
- Use Teamwork Templates to save time
- Easy sorting and quick search



NEW RELEASE

# Project List View

A new look and feel with more power

## Overview:

- Improved performance
- Customise with Custom Fields
- Table style to allow sorting and view customisation
- Powerful filters

The screenshot displays the 'Active Projects (186)' interface. At the top right, there is a '+ Add Project' button. Below the title, a table lists projects with columns for Project Name, Owner, Company, and Start Date. The table contains several rows, including 'Another project', 'Another project (Copied: 2020/12/15)kgghk', 'Another project - (Copied: 2019/07/31)', 'archived project', 'Batmobile Project', and 'Big company event planning template:'. A 'Filters' panel is overlaid on the bottom left, showing filter categories like 'Tags', 'Owner', 'Health', and 'Companies', along with an 'Exclude Tags' dropdown and checkboxes for 'Hide projects where I'm an observer' and 'Show starred projects only'. A 'Customize view' panel is overlaid on the bottom right, allowing users to toggle various columns: Owner, Company, Start Date, End Date, Tags, Budget, Latest Activity, and Health. A 'More...' option with a right arrow is also present.

Project Name	Owner	Company	Start Date
Another project	BC	Another company	1 Dec 2015
Another project (Copied: 2020/12/15)kgghk	BC	Another company	30 Jun 2021
Another project - (Copied: 2019/07/31)	JC	Another company	2 Feb 2020
archived project	GG	Julie's co	2 Oct 2015
Batmobile Project	[Profile]		n 2018
Big company event planning template:	JA		l 2020
Big company event planning template: (377050)	JJ		g 2020

# Improved Table View

View, sort and edit all tasks on a single project within the table view

## Overview:

- Inline editing: assign tasks, set due dates, and change the priority level
- Resize columns and reorder custom fields
- Set your own filtering
- Sort across all tasks on a project
- **(NEW) Manually sort tasks in a table**
- **Coming soon: Custom Fields improvements**

The screenshot displays a 'Tasks' table view in Teamwork. The table has columns for Task Name, Assignee, Start Date, Due Date, and Priority. A 'Quick search' bar is located at the top right. The tasks listed are:

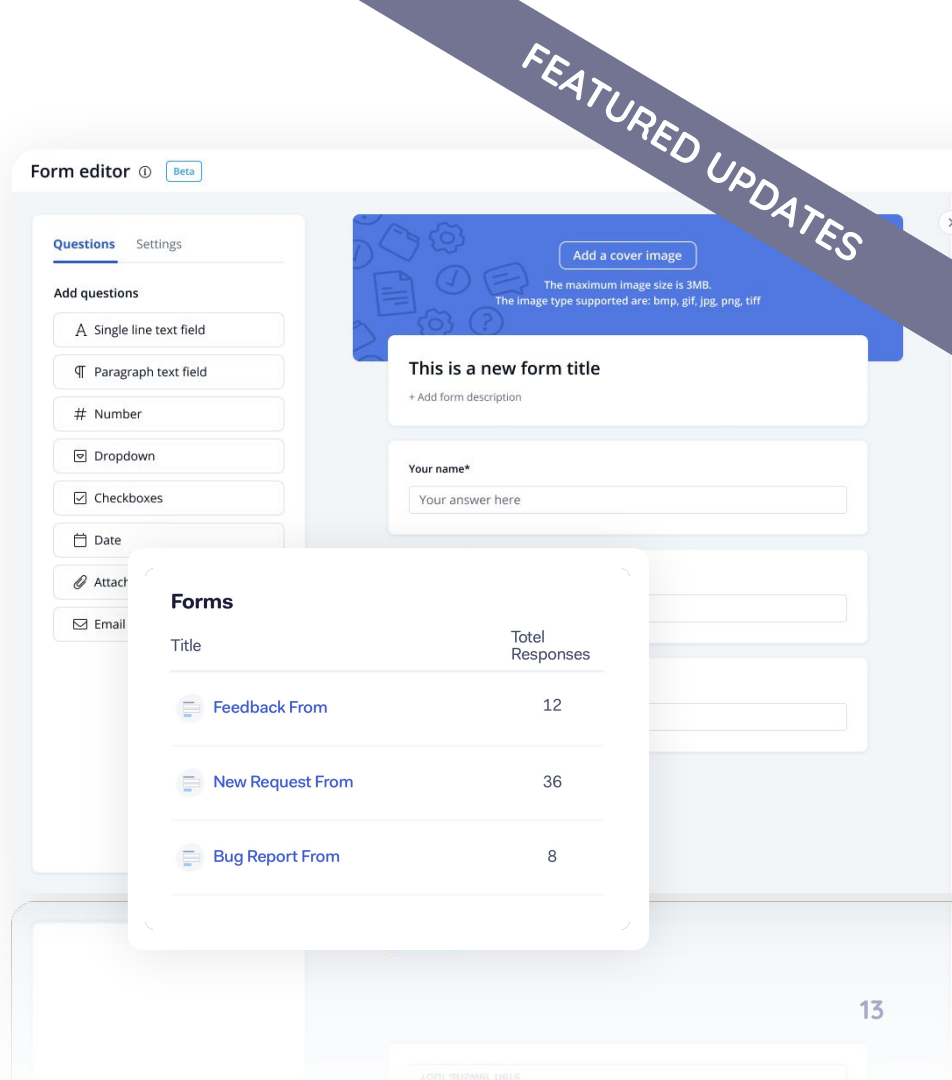
Task Name	Assignee	Start Date	Due Date	Priority
✓ Send client access requirements	[Avatar]	Today	Today	High
✓ Order board lunch	[Avatars]	Tomorrow	Tomorrow	High
✓ Submit timesheet	[Avatar]	Today	18th Mar	High
✓ Draft design briefs	[Avatars]	Today	26th Mar	High
✓ Call Marcus	[Avatar]	—	28th Oct, 2020	Medium
✓ Agree invoicing cadence	[Avatar]	9th Feb	Yesterday	Medium
✓ Meeting agenda	[Avatar]	Today	Today	Medium
✓ Set client up on Teamwork	[Avatars]	Today	18th Mar	Low
✓ Send client welcome pack	Anyone	9th Mar	18th Mar	Low
✓ Approval needed for new design	Anyone	—	28th Oct, 2020	None
✓ Sign contracts and agreements	[Avatars]	18th Mar	20th Mar	None

# Intake Forms

Reduce manual work by providing your stakeholders with a form for work requests

## Overview:

- Add your logo and branding
- Add attachments
- **(New) Copy forms**
- **(New) Multiple forms per project**



# Automations

Streamline business process and keep your projects organized

## Benefits:

- Reduced manual work
- Support workflows with flexible custom automations (when / then)
- Automations Templates

## Coming soon:

- Time-based triggers
- Custom automations builder

Set up automation ⓘ

Active

**When**  
Trigger starts the execution of the role

Choose project  
Teamwork Automations X

Choose trigger  
When task priority changes

Choose priority  
Medium X

→

**Then**  
Do the action

Choose action  
Assign to  
Dawid Myslak X

Cancel Create

! → [User Icon]

When a task's priority changes from low to high, assign to Dawid Myslak

Billing common-frontend-bui... Content Team +7

Created by Dawid Myslak

! → [User Icon]

When a task's priority changes from high to medium, assign to Alan Smith

Teamwork Automations

Created by Alan Smith

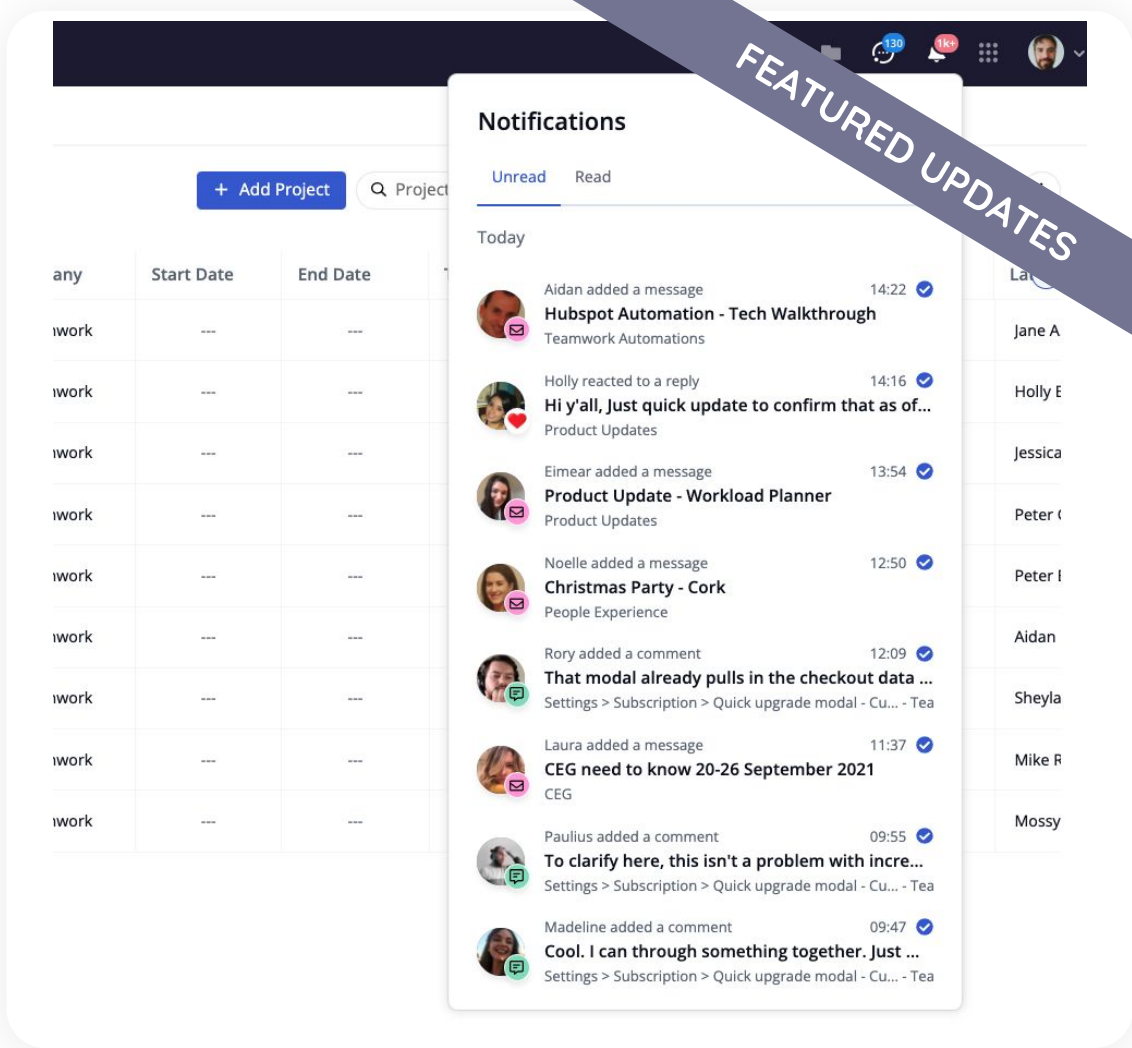
# Notifications

## Overview:

- Easily manage Read & Unread notifications

## Coming Soon:

- Dedicated Notifications Inbox



# Integrations

## Overview:

- Slack Project Channels and slash commands
- New Office add-in
- Document Editor bug fixes
- Xero updates
- Quickbooks updates



**FEATURED UPDATES**

t. /tw [help]  
Teamwork Perform Teamwo...

Q /tw|

**Teamwork APP 9:15 AM**  
Available commands: project, link, task, settings, help.

- `/tw project` : Set up project notifications in channels.
- `/tw link [url]` : Add a Link to a Project.
- `/tw task [name of the task]` : Create a task.
- `/tw settings` : Configure app settings.
- `/tw help` : Display this message.

Ok

Message Natasha 🗨 I'm eating/taking a break

🔗 | B I ↻ </> 🔗 ... Aa @ 😊 📎 ▶ | ▾



# User Rates

## Overview:

- Set cost & billable rates
- Set global and per project rates Improved
- UX for easier management

The screenshot displays the 'People' management interface. At the top, there is a search bar and a filter summary: 56 People, 42 Users, 5 Clients, 12 Collaborators, and 8 Contacts. A table lists users with columns for Name, Company, Team, Billable Rate (labeled SITE-WIDE), and Cost Rate. A modal window titled 'Hourly Rates' is open, showing a form to set a project-wide billable rate of \$100 per hour. The modal includes a 'Cancel' button and an 'Update' button.

Name	Company	Team	SITE-WIDE Billable Rate	Cost Rate
Pedro Gomez	Prime Digital	Product	180	150
Mathilde Moreau	Prime Digital	Product	200	150
			150	100
			Not set	Not set
			200	100

### Hourly Rates

Set a billable rate for a group of people. This rate can be customized per project.

Set project-wide billable rate of \$  per hour

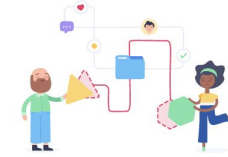
Cancel Update

# 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 the total budget
- Improved user rates and new user cost rates
- Track billable or non-billable time logged by users, and their associated billable rates



## Create a new Budget

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

Fixed fee ▼ USD ▼ 100

Budget repeats every month set start

Budget is based on all time ⊙

Notify me ▼ via email ▼ when budg

[+ add another notification](#)

**Most Common**

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

**Other Currencies**

- AFN - Afghani
- DZD - Algerian Dinar

Cancel

Create budget

# Profitability Report





Quickly assess the ROI of your projects and the profit contributions of your team

## Features:

- Project, user & company profitability reports
- % and \$ report of profitability
- User rates in context: learn how each person is contributing to the bottom line
- See which project is most profitable
- Understand your profitability over time

Reports / Profitability < > January 1st - February 15th

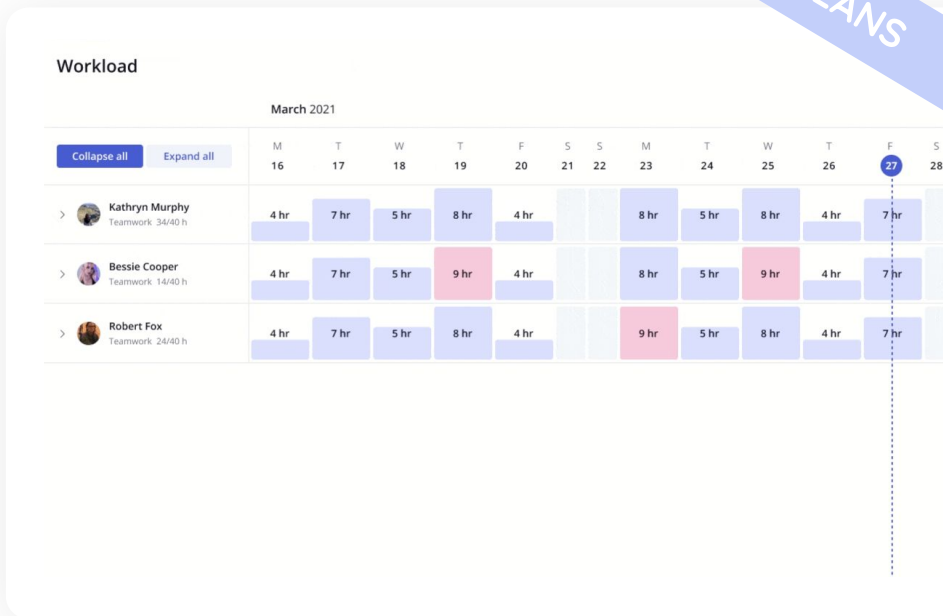
User Project

Projects	Logged time (total) ⓘ	Non-billable time ⓘ	Total cost ⓘ	Billable time ⓘ	Billable
Design Project <ul style="list-style-type: none"> <li>  <b>Markus O'Toole</b>                Product Designer <a href="#">See rates</a> </li> <li>  <b>John O'Brien</b>                Frontent Developer <a href="#">See rates</a> </li> <li>  <b>Mary Mahoney</b>                Frontent Developer <a href="#">See rates</a> </li> <li>  <b>Aishling Riordan</b>                Motion Designer <a href="#">See rates</a> </li> </ul>	400 h	100 h	\$ 20,000	300 h	\$ 30,000
> Frontent implementation	265 h	65 h	\$ 13,250	200 h	\$ 20,000
> Research Initiative	380 h	80 h	\$ 15,200	300 h	\$ 24,000
> Marketing	200 h	60 h	\$ 10,000	140 h	\$ 14,000
<b>Total</b>	1,245 h	305 h	\$ 58,450	940 h	\$ 88,000

# Workload Planner

## Features:

- Redesigned interface and improved performance
- Drag and drop functionality to manage capacity and reassign tasks
- Add and manage unavailable time



Product Roadmap

Coming Soon (Q4)

# Integrations

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Next 6 months



Improved Hubspot  
Integration



MS Teams  
updates



Dropbox  
enhancements



# Reports Engine Updates

# Project Health

Understand and manage performance across multiple projects

## Overview:

- See which projects are on time and within budget
- Know where things have gone off track
- Customizable view

## Coming Q4:

- Scheduled Reports
- Custom Date Ranges & Views
- Reports Exports

The screenshot displays the 'Project Health' dashboard with a 'Beta' badge and a search bar. The data is presented in a table with columns for Name, Owner, Time Left, Taks Completion, Budget Left, and Health. Each row represents a project with corresponding metrics and a health status indicator.

Name	Owner	Time Left	Taks Completion	Budget Left	Health
Rebranding the Website		6 days over	70%	103% 2hrs over	Needs Attention
Product Launch		36 days left	50%	42% 250hrs left	Good
eBook Release		2 days left	76%	90% 12hrs left	At Risk
Digital Event Planning	---	---	25%	---	Not Set
New PPC pages		2 days over	90%	110% 12hrs over	Needs Attention
Social Ad Campaign		5 days left	30%	85% 28hrs left	Good








# Utilization Reports

Understand which team members are the most effective.

## Overview:

- See which team members are least utilized
- See the time is being spent on billable work
- Understand areas for improvement

Utilization Beta < > 10 - 16 Jan

User ↑	Estimated Utilization ⓘ	Actual Utilization ⓘ	Available Time ⓘ	Un
 Alex Conboye	0%	0%	40 hrs	
 Annie Lennox Web Engineer	141%	584%	32 hrs	8
 Aodhagan O Riabhaigh Video Editor	0%	92%	12 hrs	27
 Billy Joel Content Marketer	426%	341%	32 hrs	8
 Chris Martin Senior Web Developer	614%	56%	36 hrs	4
 Ciara Dane Web Developer	89%	98%	44 hrs	4
 Ciara O'Sullivan Content Design	0%	236%	32 hrs	8
 Claire Murphy Senior Analyst	0%	119%	36 hrs	4

# Planned vs Actual Reports

Understand how work is progressing vs what was originally planned

## Features:

- See if Projects or Milestones were completed by originally scheduled date
- Find and address problem areas
- Assess performance and productivity retrospectively

Project Health Utilization **Planned vs Actual**

Planned vs Actual Beta < > June / Tasks Project: Client On-boarding

Task Name	Assignee(s)	Task Lists	Last Updated	Status
✓ Book conference flights	Anyone	Gantt TL	30th Jun 2021	Completed 30th Jun 2021
✓ Prep quarterly review	Anyone	May task list	30th Jun 2021	Late 12 hrs left
✓ L10 IDS	Anyone	May task list	30th Jun 2021	Late 12 hrs left
✓ Update Q3 planning doc	Anyone	May task list	30th Jun 2021	Completed 30th Jun 2021
✓ Review resourcing for Q3	Anyone	May task list	30th Jun 2021	Late 12 hrs left
✓ 1st Design Workshop	& 2	Customer Rebrand On-boardi...	29th Jun 2021	Late 12 hrs over
✓ Internal workshop postmor...	& 2	Customer Rebrand On-boardi...	29th Jun 2021	Late 12 hrs over
✓ Initial Rebrand presnetation	1	Customer Rebrand On-boardi...	29th Jun 2021	Late

# Short-term roadmap

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## 2021 (Q4)

- UX / UI Improvements to Tasks List View
- New My Work (all plans)
- Recency feature for finding what you were working on (all plans)
- New Notifications Inbox (all plans)
- Improved Templating (all plans)
- Set Project/Task List Defaults for Billable Time / All Time

# Home > My Work Redesigned

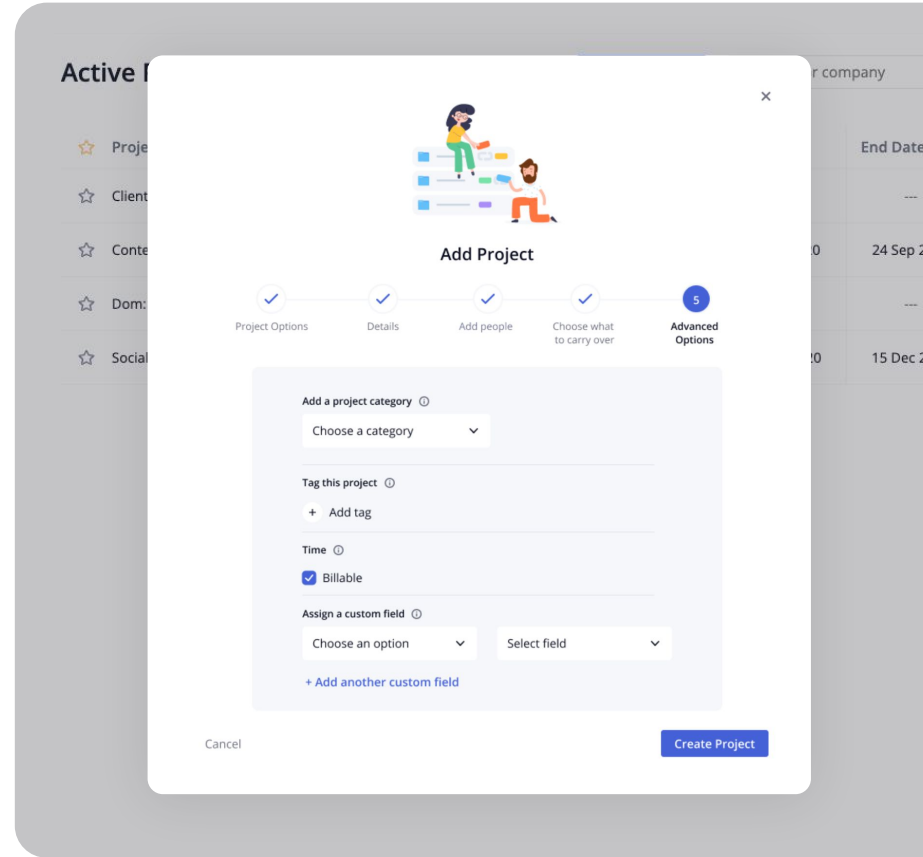
t. Home Projects Planning Reports Everything Calendar People							NO	
My Tasks							+ Add Task	Q Assignee or task name
Task Name	Due Date	Priority	Estimated time	Logged time	Project	Tags		
▼ Today								
✓ Create first draft of design asset	Today	High	5h	5h 30m	Design Project Management		⋮	
✓ 1st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

# Billable/Non-Billable Default Setting

Improve the accuracy of your customer billing via a default Billable setting at either the Project or Task List level

## Overview:

- Set the billable setting at a Project or Task List level
- Allow the PM to control which parts of the project are billable/non-billable
- Helps ensure all billable work is captured and no revenue falls through the cracks



# Task Details: Redesigned for improved UX

The screenshot displays the Teamwork web application interface. At the top, a dark navigation bar contains the Teamwork logo, navigation links (Home, Projects, Planning, Everything, Calendar, People), a search icon, an 'Upgrade' button, and utility icons (plus, folder, chat, notifications, user profile 'CM').

The main content area is titled 'Design road map (Northface)'. Below the title are tabs for 'Overview', 'Tasks', 'Milestones', 'Messages', and 'Files'. The 'Tasks' tab is active, showing a list of task lists: 'All lists' (4 items), 'Learn more' (4), 'Tableview' (0), 'Nav' (0), and 'Areas to do' (0). The 'Work together' task is selected and highlighted.

The task details panel on the right shows the following information:

- Work together** (checked)
- Estimate Time:** 0h
- Log Time:** 0h:0m
- Description:** When you work together on shared goal, you collaborate. If you don't just split a project up evenly but work together on creating solutions, you collaborate. Inside the word you see co-labor, or "working together." Cooperation is simply splitting up the work and getting it done. Manage multiple complex projects with ease and instantly...
- Assigned to:** + [User Profile]
- Priority:** Low
- Due date:** 21/02/09
- Tags:** Product management, Development
- Subtasks:** 1 (Our new Subtask)

teamwork.

Reach out to our team and be the  
first to see our **Scale plan!**

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



## Deliver

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## 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.

# Join us for Teamwork 101

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Get a guide through the core building blocks of Teamwork, such as:

- Tasks
- Board View
- Files
- Billing
- Messages
- Time

Thursday, 7th October | 8:00am PDT / 11:00am EDT / 4:00pm IST

[Register here](#)

[teamwork.com/resource/onboarding-webinar/](https://teamwork.com/resource/onboarding-webinar/)



# Product Roadmap

## Q&A

teamwork.

Thank  
You!