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Product Roadmap Q3 2021

Your hosts

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

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Trusted by over 20,000 companies

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YOUNITY / WIRZ

RS&F

SaltedStone

MADISON SPECS

PEAK SUPPORT

PRAVDA MEDIA GROUP

PayPal

24 fingers

Capgemini

Disney

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Agenda

- Product Direction
- Recently Released Features
- Coming Soon
- Sneak Peak: Scale Plan
- Q & A

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How to participate today

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

Questions
[Enter a question for staff]
Send

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Product Direction

Project Planning

Resource Management

Improve capability

Project Management

Improve UX

Reporting

- Efficiency
- Profitability
- Utilization

Build out Capability

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Product Roadmap

Recently Released Features

'Add Project' Flow

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
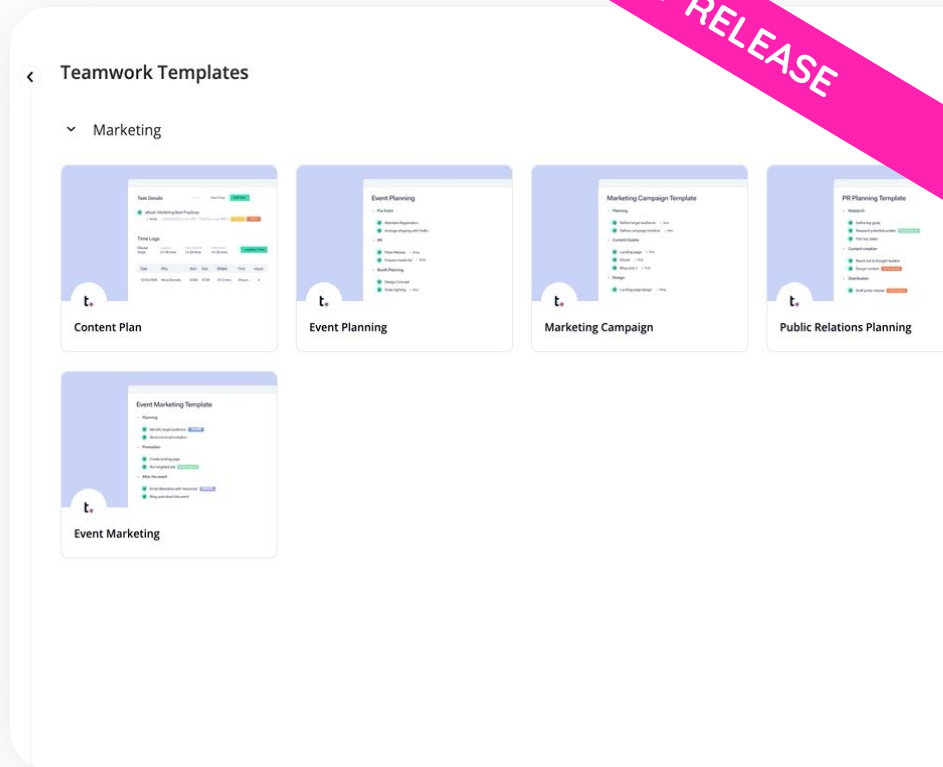- Key project features readily accessible

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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

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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

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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**

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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**

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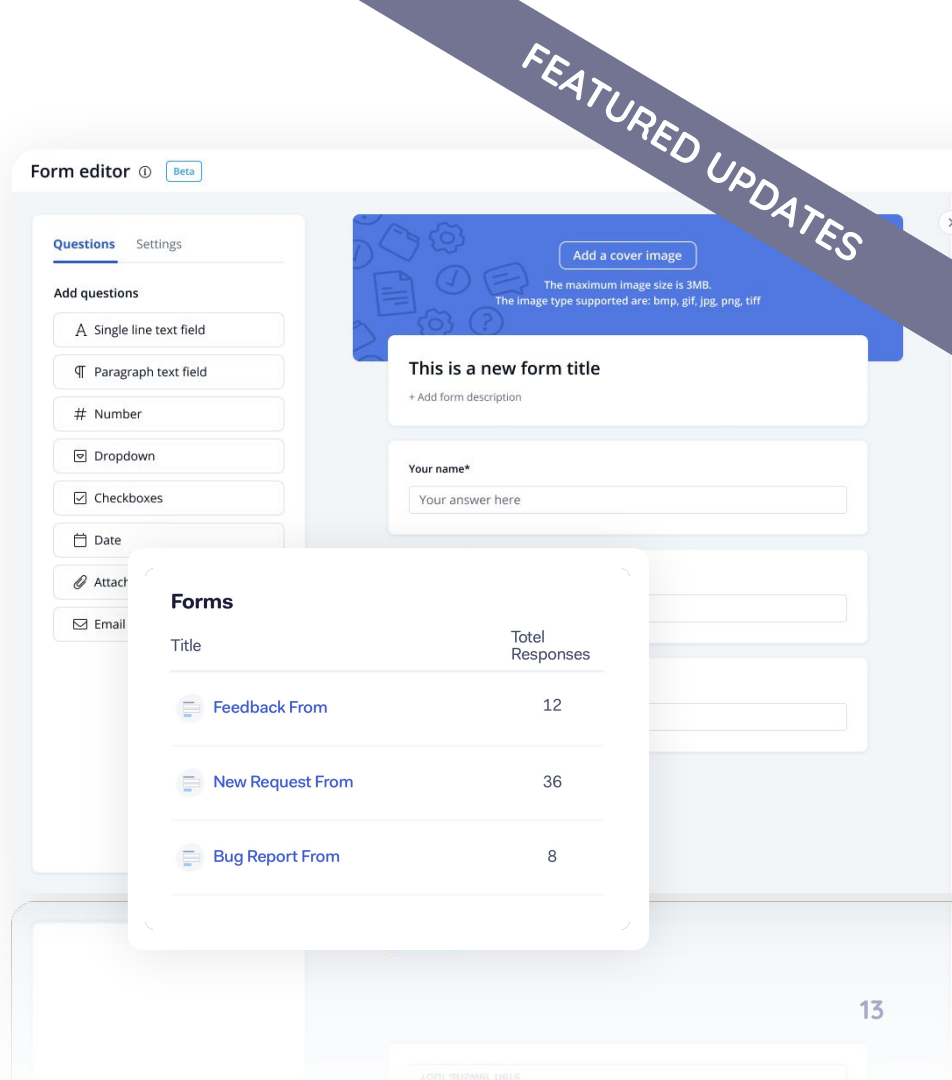
Automations

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
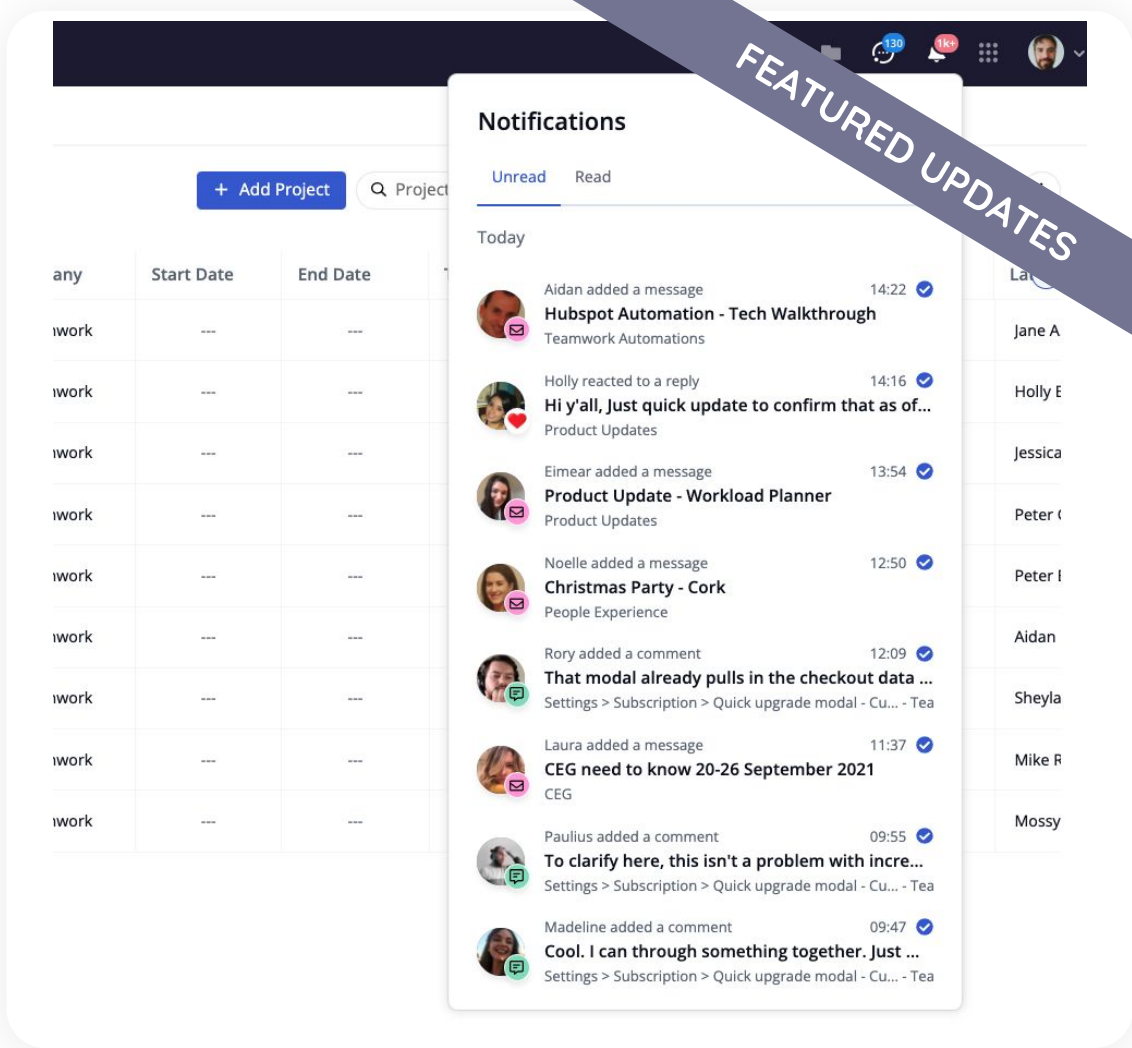- Custom automatons builder

NEW RELEASE

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Notifications

Overview:

- Easily manage Read & Unread notifications

Coming Soon:

- Dedicated Notifications Inbox

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Integrations

Overview:

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

FEATURED UPDATES

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

🔍 /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

User Rates

Overview:

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

People

ⓘ Who can see hourly rates?

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

56 People | 42 Users | 5 Clients | 12 Collaborators | 8 Contacts

Hourly Rates

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

Set project-wide billable rate of $ 100 per hour

Cancel   **Update**

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Financial Budgets

Track your project's budget in real time, to keep you on track to meet your financial goal

Overview:

- Set a monetary budget at the start of a project
- Monitor your spend against 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

GROW & SCALE PLANS
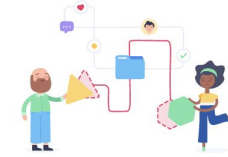
Create a new Budget

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

Fixed fee

USD 100

Most Common
USD - US Dollar
CAD - Canadian Dollar
EUR - Euro
GBP - Pound Sterling
Other Currencies
AFN - Afghani
DZD - Algerian Dinar

Budget repeats every month   set start

Budget is based on all time

Notify me   via email   when budget exceeds

+ add another notification

Cancel

Create budget

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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	400 h	100 h	$ 20,000	300 h	$ 30,000
Markus O'Toole — Product Designer — See rates	100 h	40 h	$ 4,000	60 h	$ 5,000
John O'Brien — Frontent Developer — See rates	80 h	20 h	$ 6,000	60 h	$ 7,000
Mary Mahoney — Frontent Developer — See rates	100 h	15 h	$ 5,000	85 h	$ 13,000
Aishling Riordan — Motion Designer — See rates	120 h	25 h	$ 5,000	95 h	$ 5,000
› 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
Total	1,245 h	305 h	$ 58,450	940 h	$ 88,000

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Workload Planner

Features:

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

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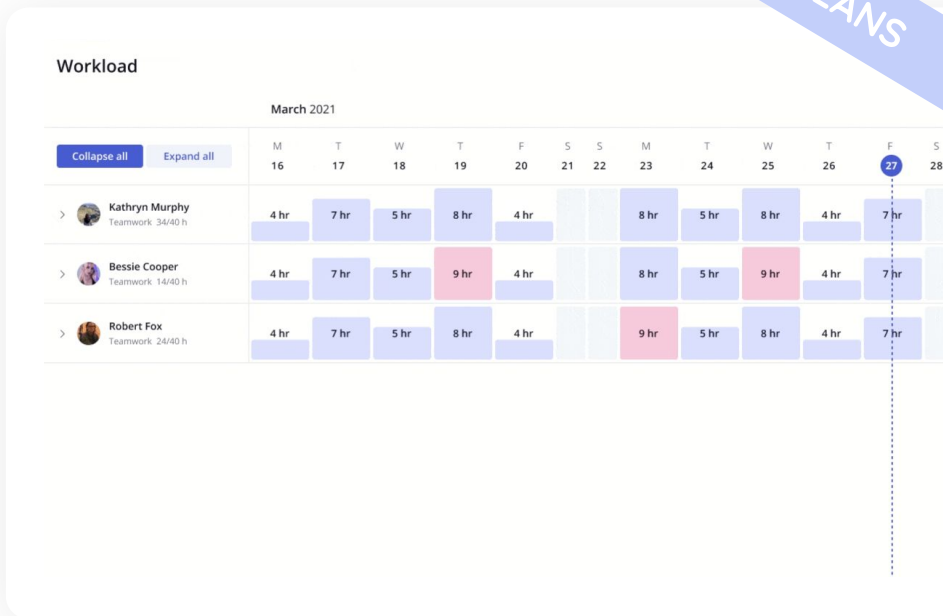
Product Roadmap

Coming Soon (Q4)

Integrations

Next 6 months

Improved Hubspot
Integration

MS Teams
updates

Dropbox
enhancements

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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

Project Health Beta

Last 3 months ⌄

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 ⌄

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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

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Planned vs Actual Reports

Understand how work is progressing vs what 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

Short-term roadmap

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
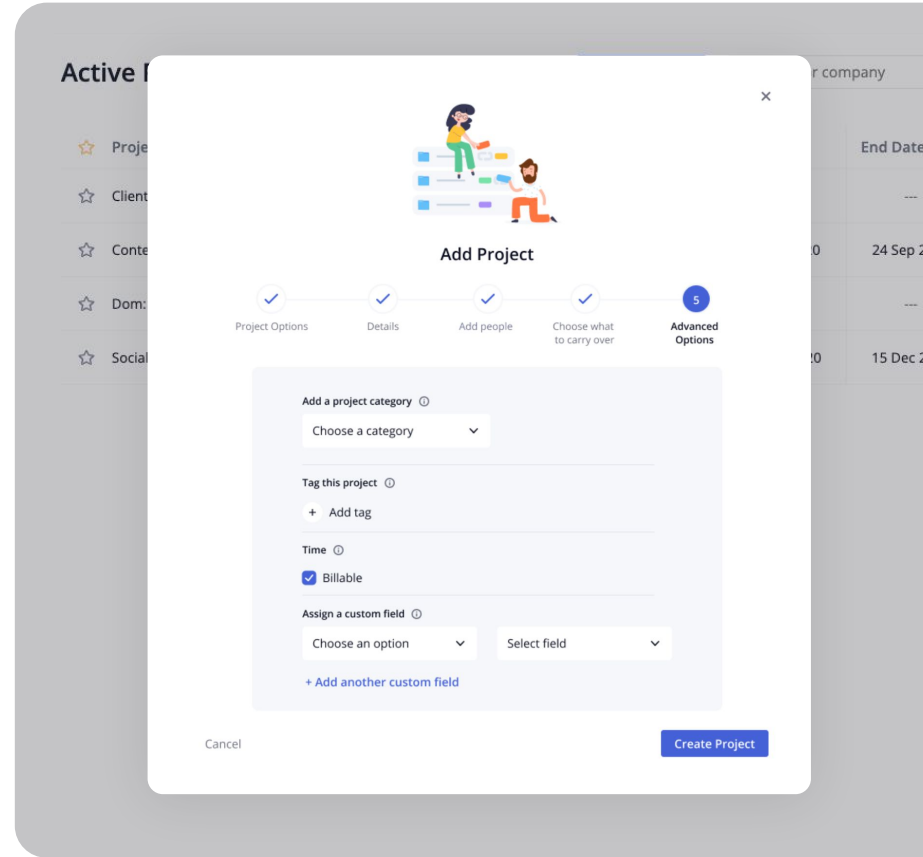
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Home > My Work Redesigned

| | Home | Projects | Planning | Reports | Everything | Calendar | People | | | | | | NO |

My Tasks

+ Add Task   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 ✕	...
✓ 2nd review to client	Today	Medium	3h	2h 30m	Design Project Management	Client review ✕	...
✓ 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 ✕ TOFU ✕	...
✓ How Growing Agencies Can Maintain Healthy Margins as They S...	Mar 1st	High	3h	---	Content Marketing Copy 1	Blog ✕ TOFU ✕	...
✓ Using Boardview for Teamwork Projects	Mar 1st	High	7h	---	Content Marketing Copy 1	Blog ✕ BOFU ✕	...
✓ Creativity vs. Productivity: How to Find the Balance with Teamw...	Mar 1st	None	9h	---	Content Marketing Copy 1	Blog ✕ MOFU ✕	...
✓ How to Make the Switch from Billable Hours to Subscription Bill...	Mar 1st	None	4h	---	Content Marketing Copy 1	Blog ✕ TOFU ✕	...
▼ 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

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Task Details: Redesigned for improved UX

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

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.

NEW

Scale

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

Join us for Teamwork 101

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/

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Product Roadmap

Q&A

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Thank You!