



One Board Planner Premium

Regional Readiness Project Management on Teams

March 2025

Regional Readiness

Agenda

One Board - Planner Premium



1 2 3 4

Why?

What are we looking for and why we need some updates

How?

What's new in Planner Premium and how will it be used

When?

Next steps and timeline for the implementation

Solution - RR Projects Board

Overview of the proposed solution

1. Why?

What are we looking for and why we need some updates

Current boards Pain Points

- Duplication of cards (Pipeline and Portfolio board).
- No clear Pipeline.
- Start Date – Finish date creating conflicts.
- No clear ownership of the projects.
- Not designed for reporting.

2. How?

What's new in Planner Premium and how will it be used

Planner Premium features

- Additional filtering options (Goals, new custom fields, summary tasks, people).
- Tasks grouping (Sub-tasks)
- Task conversations (possibility to tag people)
- Gantt chart available. Dependencies can be added.
- People view (personnel capacity balancing).
- Colored buckets, conditional coloring.
- Copilot integration.
- Backlogs and Sprints available.



2. How?

What's new in Planner Premium and how will it be used

Current boards Pain Points

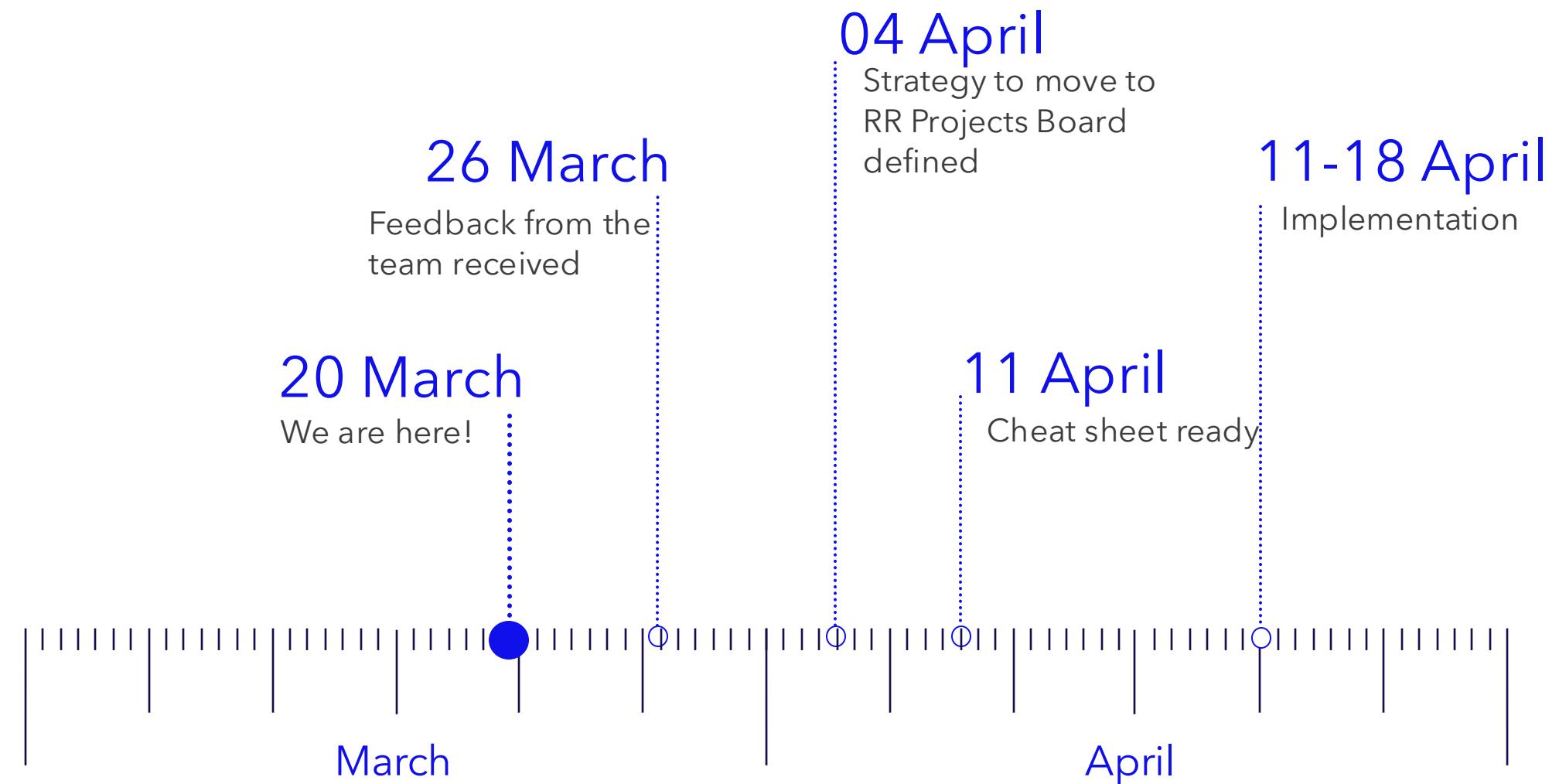
- Duplication of cards (Pipeline and Portfolio board).
- No clear Pipeline.
- Start Date - Finish date creating conflicts.
- No clear ownership of the projects.
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Feature/solution used

- 1 single board. Pipeline is a **bucket** now!
- Real Pipeline now + regional one using **Timeline**.  Timeline
- Start Date-Finish date (project duration). **New field** used for Next activity date.
- 1 single owner for a card. **People view** will give us workload info.  People
- **Goals and new fields** used to create a  Goals **Power BI dashboard** (public reporting site)

3. When?

Next steps and timeline for the implementation



4. Solution - RR Projects Board

Overview of the proposed solution

New Structure (sub-tasks)

New Fields

Task Name	Sub-Region	Goal	Bucket	Assigned to
> RR - [Project Name] - Option 1	GLOBAL	NPI	Execute	Felipe Novillo
> RR - [Project Name] - Option 2	EMEA - WEU	NPI	Execute	Felipe Novillo
MEDSURG	APAC - ISEA	NPI	Execute	Felipe Novillo
> RR - [Project PEGASUS]	AMERICAS - CANADA	NPI	Execute	David Sarmiento
RR - EndoFlip 300	AMERICAS - LATAM NOLA	NPI	Execute	David Sarmiento
PLC - RR - EndoFlip 300 - 00 GLOBAL				
PLC - RR - Endoflip 300 - 01 EMEA				
PLC - RR - Endoflip 300 - 02 I-SEA				
PLC - RR - Endoflip 300 - 03 Canada				
PLC - RR - Endoflip 300 - 04 LATAM (NOLA)				

4. Solution - RR Projects Board

Overview of the proposed solution

My plans > ONE Board v1 Grid Board

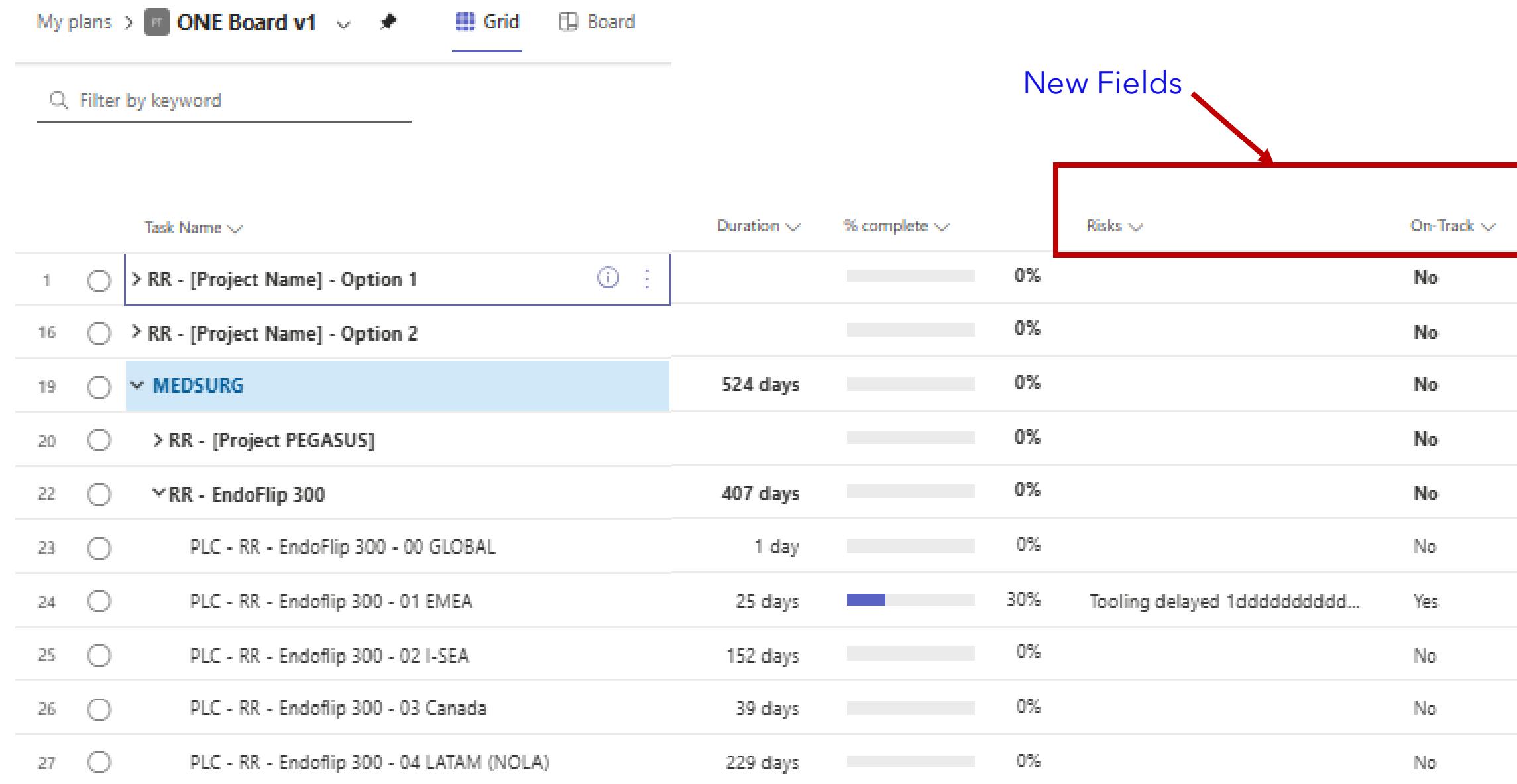
Filter by keyword

	Task Name	Labels	Complexity	Next Activity	Start	Finish	Actual Finish
1	> RR - [Project Name] - Option 1						
16	> RR - [Project Name] - Option 2						
19	○ MEDSURG				28/5/2024	29/5/2026	
20	> RR - [Project PEGASUS]						
22	○ ▾RR - EndoFlip 300			4/3/2025	28/5/2024	17/12/2025	
23	○ PLC - RR - EndoFlip 300 - 00 GLOBAL	MedSurg - Endo X	MED		28/5/2024	28/5/2024	28/5/2024
24	○ PLC - RR - Endoflip 300 - 01 EMEA	MedSurg - Endo X	MED	14/3/2025	29/5/2024	2/7/2024	2/7/2024
25	○ PLC - RR - Endoflip 300 - 02 I-SEA	MedSurg - Endo X	MED		2/9/2024	1/4/2025	
26	○ PLC - RR - Endoflip 300 - 03 Canada	MedSurg - Endo X	SM		28/5/2024	19/7/2024	19/7/2024
27	○ PLC - RR - Endoflip 300 - 04 LATAM (NOLA)	MedSurg - Endo X	SM		28/5/2024	11/4/2025	

New Fields

4. Solution - RR Projects Board

Overview of the proposed solution



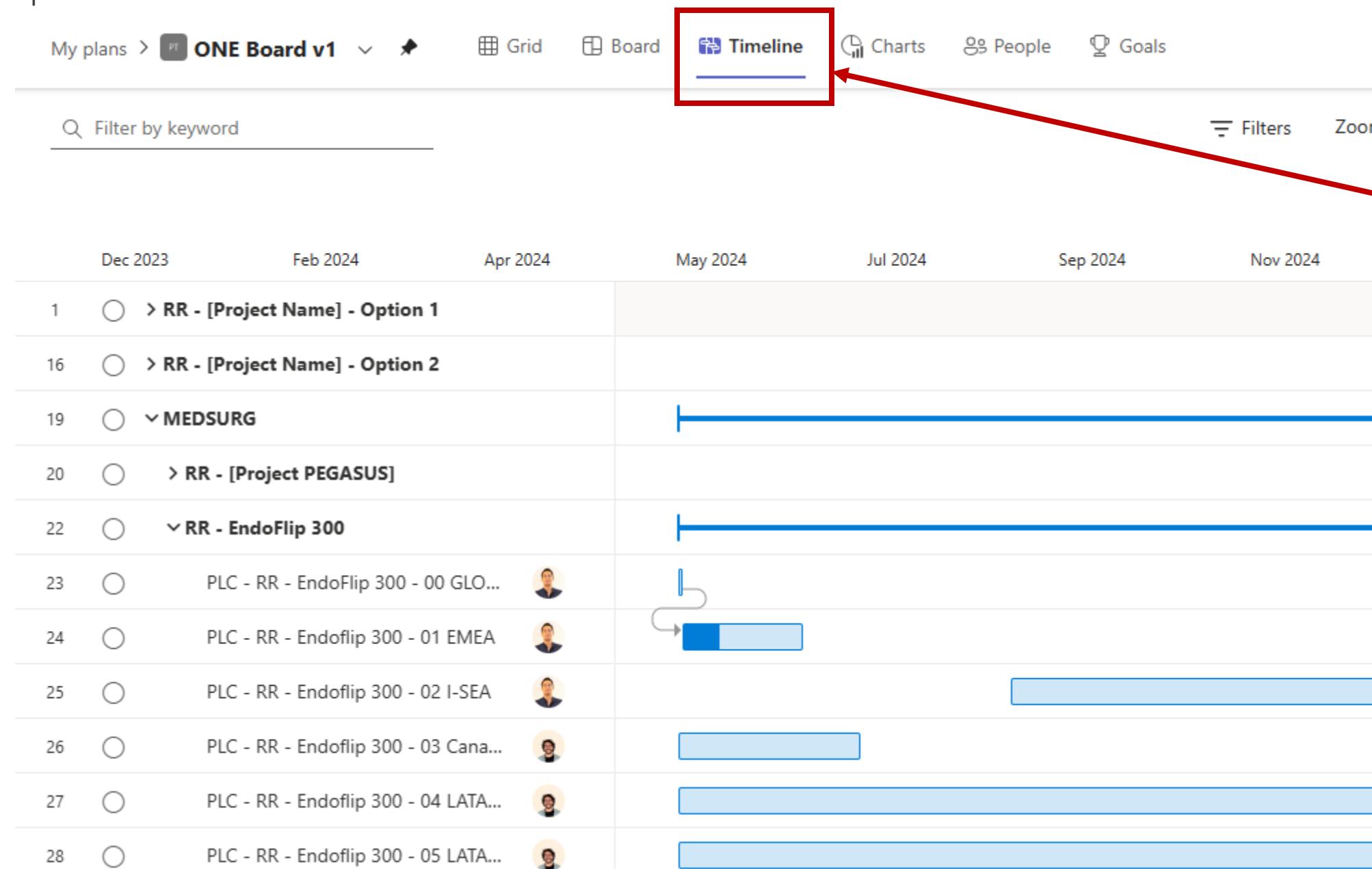
The screenshot shows a project management board titled "ONE Board v1". The interface includes a navigation bar with "My plans" and a search/filter bar. The main area displays a grid of tasks with columns for Task Name, Duration, % complete, Risks, and On-Track status.

New Fields: A red arrow points to the "Risks" column, which is highlighted with a red border. The "On-Track" column is also visible.

	Task Name	Duration	% complete	Risks	On-Track
1	> RR - [Project Name] - Option 1		0%		No
16	> RR - [Project Name] - Option 2		0%		No
19	▼ MEDSURG	524 days	0%		No
20	> RR - [Project PEGASUS]		0%		No
22	▼ RR - EndoFlip 300	407 days	0%		No
23	PLC - RR - EndoFlip 300 - 00 GLOBAL	1 day	0%		No
24	PLC - RR - Endoflip 300 - 01 EMEA	25 days	30%	Tooling delayed 1ddddddddd...	Yes
25	PLC - RR - Endoflip 300 - 02 I-SEA	152 days	0%		No
26	PLC - RR - Endoflip 300 - 03 Canada	39 days	0%		No
27	PLC - RR - Endoflip 300 - 04 LATAM (NOLA)	229 days	0%		No

4. Solution - RR Projects Board

Overview of the proposed solution



Simple Gantt
chart view

4. Solution - RR Projects Board

Overview of the proposed solution

The screenshot shows the 'ONE Board v1' interface with a 'People' view section highlighted by a red box and arrow. The 'People' section displays three team members: Felipe Novillo, Brian Thornton, and Camilo Calderon, each with incomplete and late task counts. A dashed red box encloses the three team cards.

Team Member	Incomplete	Late
Felipe Novillo	6	6
Brian Thornton	4	6
Camilo Calderon	1	3

Below the 'People' section, there are several other sections and cards:

- Unassigned:** Incomplete: 16, Late: 0. Includes an 'Add task' button.
- Template cards:** 16 items listed, including RR - [Project NAME] - ## [Sub-Region], RR - [Project Name] - ## ANZ, and RR - [Project Name] - ## CANADA.
- To be reviewed:** 1 item listed, RR - [Project NAME] - 00 GLOBAL.
- Pipeline:** 1 item listed, PLC - RR - Endoflip AI - 00 Upstream.
- Global Alignment:** 3 items listed, PLC - RR - Pillcam Genius Phase 3 Mobile App - 00 Upstream, PLC - RR - Corsano Cardiowatch 287-2 (wEU) - 00 Upstream, and PLC - RR - Resppray - 08 LATAM (CELA).
- Engage:** 3 items listed, PLC - RR - Resppray - 07 LATAM (SOLA), PLC - RR - Calima - 03 Brazil, and PLC - RR - Resppray - 08 LATAM (CELA).

People view:
Quick summary
per PM

4. Solution – RR Projects Board

Overview of the proposed solution

The screenshot shows the ONE Board v1 interface. At the top, there is a navigation bar with 'My plans' and a dropdown menu labeled 'ONE Board v1'. Below the navigation bar are five tabs: 'Grid', 'Board', 'Timeline', 'Charts', and 'People'. To the right of these tabs is a button labeled 'Goals' with a trophy icon, which is highlighted with a red box and a red arrow pointing to it from the text 'Goals view: Easy filtering per Lifecycle'. Below the tabs, there is a section titled '+ Add goal' with three items listed: 'EOL', 'RPE', and 'NPI', each preceded by a trophy icon. These three items are also highlighted with a red dashed box.

Goals view:
Easy filtering
per Lifecycle

Category	Item	Status
Goals	EOL	Not started
	RPE	Not started
	NPI	Not started

Thank you