



One Board Planner Premium

Regional Readiness Project Management on Teams

March 2025
Regional Readiness

Agenda

One Board – Planner Premium



1

Why?

What are we looking for and why we need some updates

2

How?

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

3

When?

Next steps and timeline for the implementation

4

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

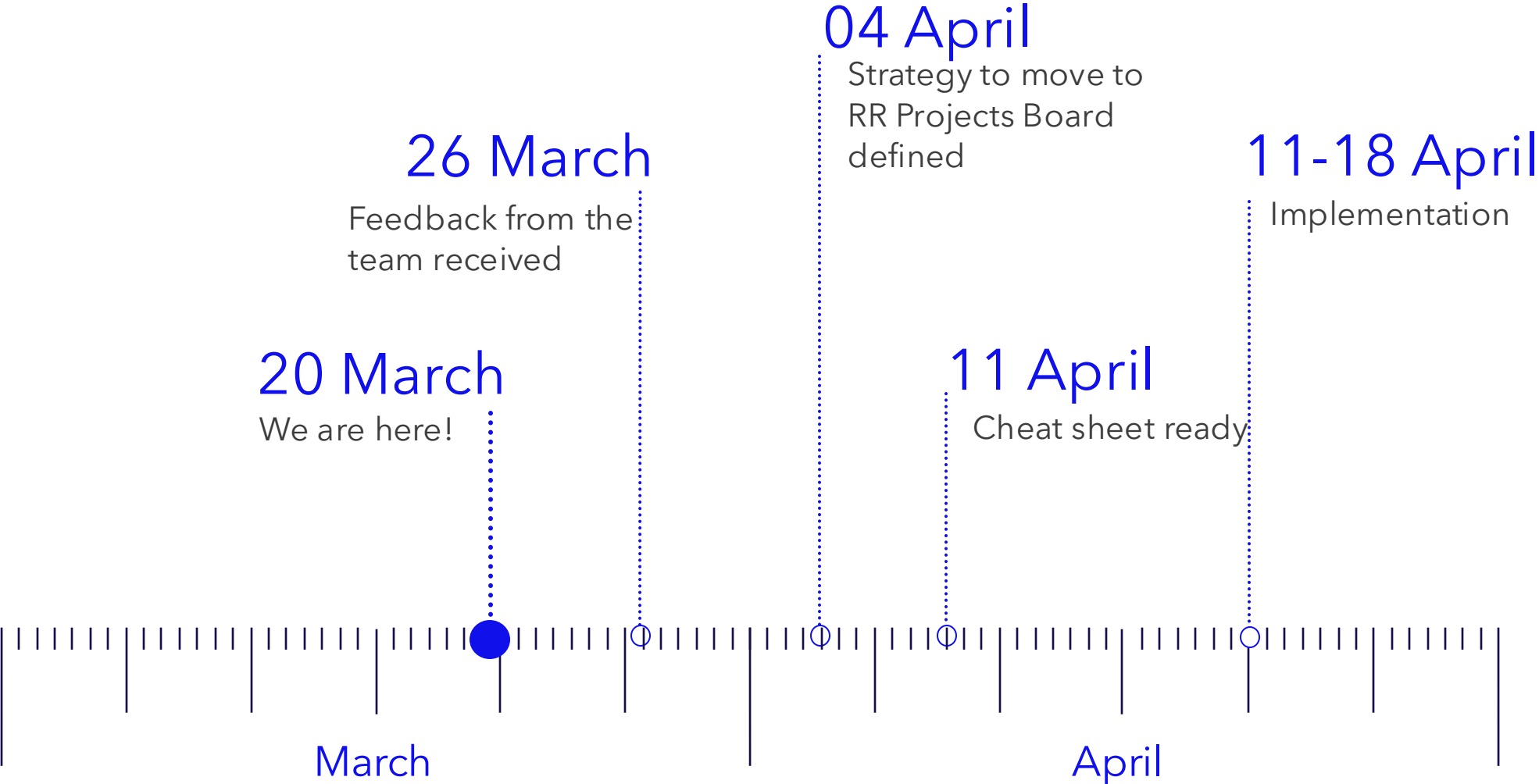
- Duplication of cards (Pipeline and Portfolio board).
- No clear Pipeline.
- Start Date - Finish date creating conflicts.
- No clear ownership of the projects.
- Not designed for reporting.

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

My plans > **ONE Board v1** **Grid** Board Timeline Charts People Goals

Filter by keyword

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

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 ✕	MED ▾		28/5/2024	28/5/2024	
24	○ PLC - RR - Endoflip 300 - 01 EMEA	MedSurg - Endo ✕	MED ▾	14/3/2025	29/5/2024	2/7/2024	
25	○ PLC - RR - Endoflip 300 - 02 I-SEA	MedSurg - Endo ✕	MED ▾		2/9/2024	1/4/2025	
26	○ PLC - RR - Endoflip 300 - 03 Canada	MedSurg - Endo ✕	SM ▾		28/5/2024	19/7/2024	
27	○ PLC - RR - Endoflip 300 - 04 LATAM (NOLA)	MedSurg - Endo ✕	SM ▾		28/5/2024	11/4/2025	

New Fields

4. Solution – RR Projects Board

Overview of the proposed solution

My plans > **ONE Board v1** Grid Board

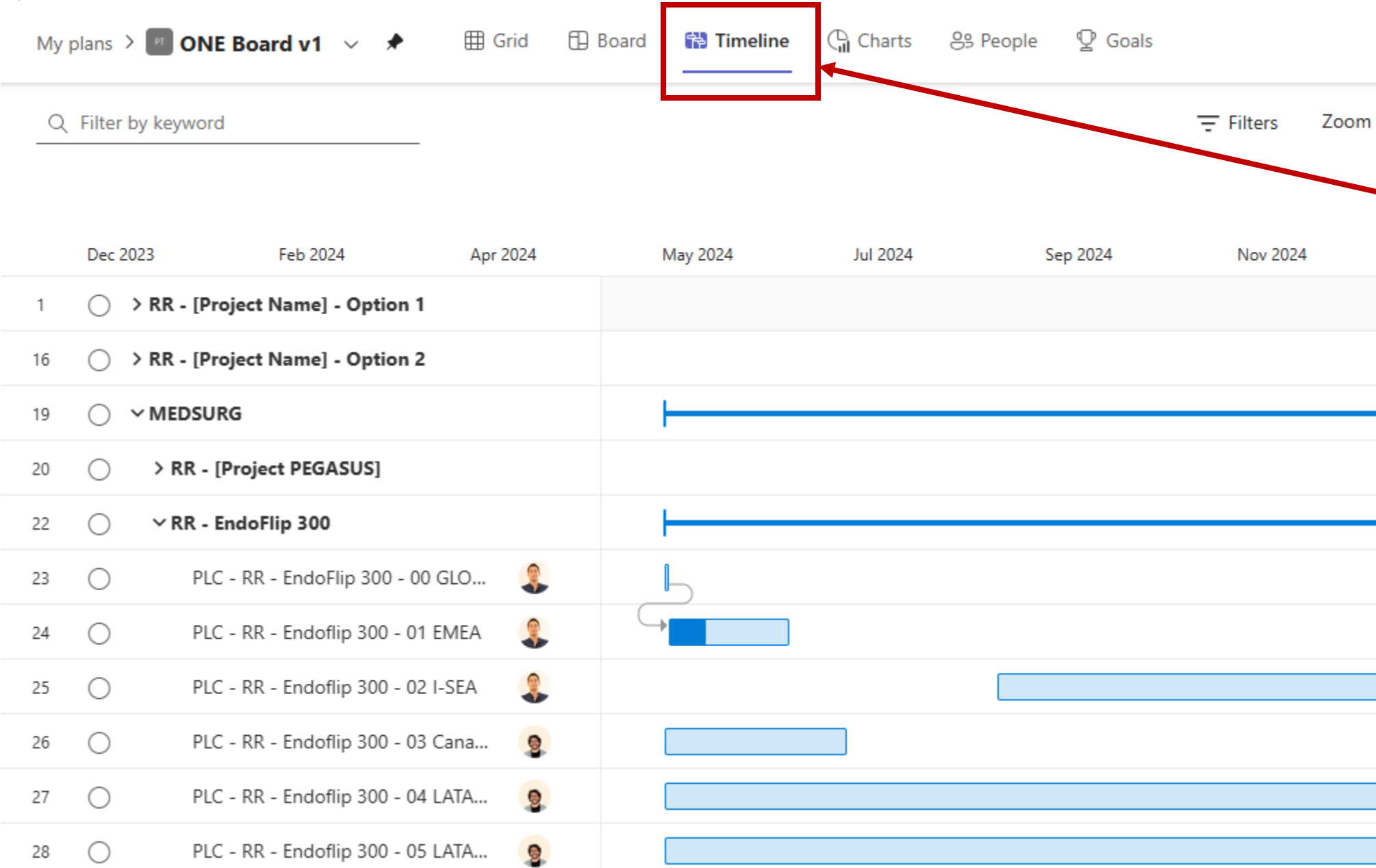
Filter by keyword

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

New Fields

4. Solution – RR Projects Board

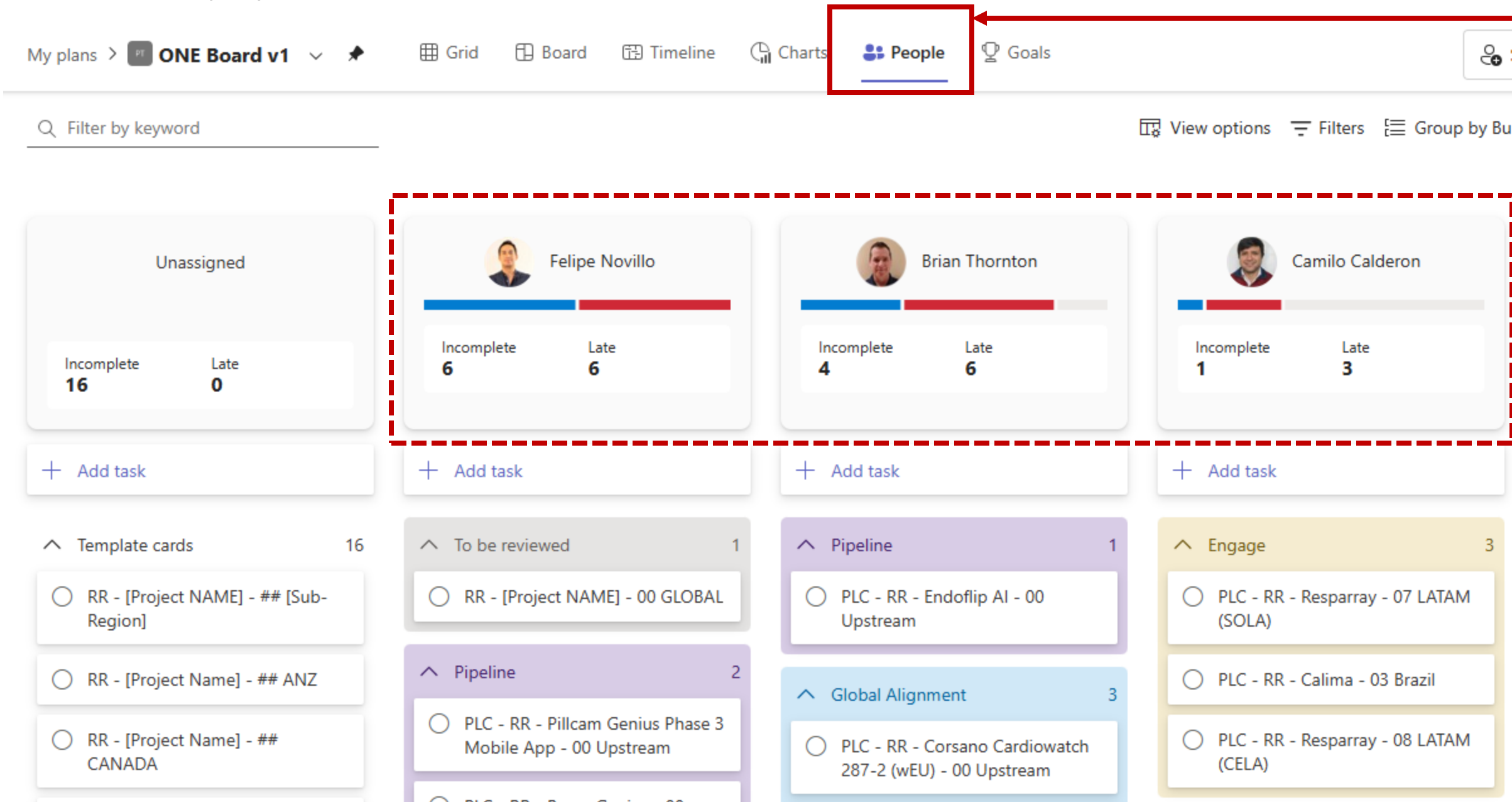
Overview of the proposed solution



Simple Gantt
chart view

4. Solution – RR Projects Board

Overview of the proposed solution



People view:
Quick summary
per PM

4. Solution – RR Projects Board

Overview of the proposed solution

Goals view:
Easy filtering
per Lifecycle

My plans >

PT ONE Board v1

Grid

Board

Timeline

Charts

People

Goals

+ Add goal

> EOL

Not started

> RPE

Not started

> NPI

Not started

Thank you