



Getting Started with LiquidPlanner

Agenda



Why LiquidPlanner?

Our Goals

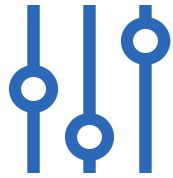
Our Playbook

Our Workspace

Next Steps

Group Q&A

Why LiquidPlanner?



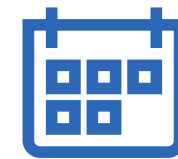
Dynamic Project Management

LiquidPlanner is fluid, responds to change, and offers dashboards and reports to show critical data in real-time.



Increase Visibility

All work, updates, and project data is organized in a central location which helps us stay focused and collaborative.



Predictive Scheduling

Project schedules are based on priorities, effort, and ranged estimates, which limits uncertainty and missed deadlines.

Our Goals



Everyone knows and works on the **right priorities at the right time.**



Important **conversations are captured** on the projects they pertain to.



We **understand the impact** of new and changing priorities to our entire portfolio.



We can easily **share information** with the team, executives, and clients.

Our Playbook: How We'll Use LiquidPlanner



Review our Playbook for complete guidelines on how our team will use LiquidPlanner:

Quick Tips:

- Everyone is required to use LiquidPlanner so that we can achieve our goals as a team.
- Estimates and time spent on tasks should be updated daily.
- Project managers will create projects, set priorities, and assign tasks.
- Add new items to the Inbox to be discussed and prioritized.
- Use comments to collaborate on projects instead of email.

Our Workspace Structure



Our projects are built and prioritized within the Projects tab.



Items are scheduled in top-down priority order.



Packages are containers that allow PMs to organize projects and prioritize tasks across different projects.

Our Workspace Structure: Packages



Inbox

Houses new items pending review. Project Managers will regularly evaluate and triage these items into appropriate projects.



ASAP

A high-priority package for tasks only. Tasks from different projects will be intermingled here to establish priority overrides.



Pending Projects

An organizational package for projects that are in the pipeline, gathering requirements or in pre-launch.



Templates

Contain templated projects that can be duplicated and used for newly launched projects (for Managers only).



Events

Holds all members' out-of-office events and meetings.



Active Projects

An organizational package for projects that are currently live and in-progress.



Ongoing

Holds overhead tasks that are not part of any project

An overhead view of a group of people in a meeting, with the image dimmed to a dark blue color. The people are seated around a light-colored wooden table. On the table are several items: two laptops, a tablet, various papers and documents, a calculator, a coffee cup, and some small containers. One person is pointing at a document on the table. The overall atmosphere is professional and collaborative.

Let's See Our Workspace

Next Steps



Together, and with the help of LiquidPlanner, our team will find even greater success.

Quick Tips:

- Review our team playbook.
- Accept your invitation to join the workspace.
- Use the training resources we send you or explore the LiquidPlanner Help Center at your own pace.

An overhead, top-down view of a group of people in a business meeting. They are seated around a light-colored wooden table. On the table are several laptops, large sheets of paper with diagrams or charts, a calculator, and coffee cups. The people are dressed in business attire. The entire image is overlaid with a dark blue tint.

Questions?