

CONSULTING & MANAGED DELIVERY SERVICES

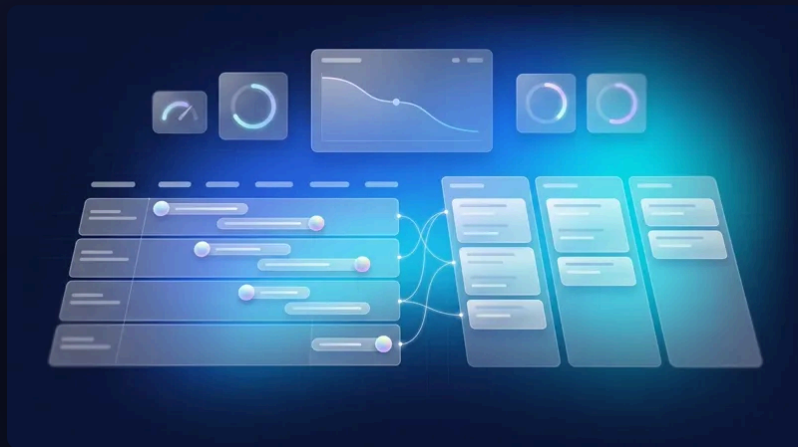
PlanMagnet Services

Expert hands on PlanMagnet. We help you adopt and get more from the platform, and deliver done-for-you delivery-management outcomes powered by it.

GROUNDED IN THE PRODUCT

RBAC & AUDIT THROUGHOUT

API-FIRST & GRAPHQL-BASED



PlanMagnet is the product & project management platform that unites roadmaps, backlogs, sprints, docs, and delivery metrics in one workspace.

01 Expert hands on PlanMagnet

PlanMagnet is a platform you can run yourself. But you do not have to do it alone.

We help you adopt and get more from PlanMagnet — and we deliver done-for-you delivery-management outcomes powered by it: rollouts, integrations, migrations, an embedded PMO, governance, and enablement.

Comprehensive services across the PlanMagnet lifecycle — every one grounded in a real product capability. Engage one, or combine several into a program.

TRACK A

Get more from PlanMagnet

Consulting, implementation, migration, security, and training so your team gets the full value of the platform — faster, and with governance from day one.

TRACK B

Powered by PlanMagnet

Done-for-you outcomes we deliver using the product — rollouts, integrations, and a managed PMO — so you can focus on building.

02 What we do

Comprehensive services across the PlanMagnet lifecycle — every one grounded in a real product capability.
Engage one, or combine several into a program.

01 Process Consulting & Workspace Design

GET MORE FROM PLANMAGNET

03 Migration from Jira, Trello, Asana & more

GET MORE FROM PLANMAGNET

05 Agile & Delivery Enablement

GET MORE FROM PLANMAGNET

07 Managed PMO & Operations

POWERED BY PLANMAGNET

09 Training & Team Enablement

GET MORE FROM PLANMAGNET

03

02 Implementation & Rollout

POWERED BY PLANMAGNET

04 Integrations & Developer Platform

POWERED BY PLANMAGNET

06 Insights & AI Enablement

GET MORE FROM PLANMAGNET

08 Security, RBAC & Governance

GET MORE FROM PLANMAGNET

SECTION 03 • SERVICE TRACK

Get more from PlanMagnet

Consulting, implementation, migration, security, and training so your team gets the full value of the platform — faster, and with governance from day one.

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- 01 **Process Consulting & Workspace Design**
 - 03 **Migration from Jira, Trello, Asana & more**
 - 05 **Agile & Delivery Enablement**
 - 06 **Insights & AI Enablement**
 - 08 **Security, RBAC & Governance**
 - 09 **Training & Team Enablement**

01 GET MORE FROM PLANMAGNET

Process Consulting & Workspace Design

We help you design how PlanMagnet maps to your reality — project structure, issue types, workflows, roadmap model, and RBAC roles — so a single team or a whole org is modelled correctly from day one instead of fighting the tool later.

WHAT YOU GET

- ◆ Discovery of your current tools, rituals, and reporting needs
- ◆ Project, issue-type, and workflow design that fits how you actually work
- ◆ Roadmap, OKR, and capacity model set up for your planning cadence
- ◆ Single-team vs. multi-team workspace topology recommendations
- ◆ RBAC role design and least-privilege access grounded in the platform

03 GET MORE FROM PLANMAGNET

Migration from Jira, Trello, Asana & more

Moving off a legacy tracker, a board tool, and a separate docs app? We migrate your projects, issues, history, and docs into PlanMagnet with mapping and validation, so nothing important is lost in the move.

WHAT YOU GET

- ◆ Inventory of current trackers, boards, docs, and integrations
- ◆ Field, status, and workflow mapping into the new model
- ◆ Issue, comment, attachment, and history migration where feasible
- ◆ Parallel-run validation and a reversible cutover plan
- ◆ Team handover with runbooks for the new way of working

05 GET MORE FROM PLANMAGNET

Agile & Delivery Enablement

We turn the tool into a smooth way of working — sprint cadence, backlog hygiene, definition of done, and the metrics that matter — configured to how your teams actually deliver, not a textbook ideal.

WHAT YOU GET

- ◆ Sprint, board, and backlog configuration tuned to your cadence
- ◆ Estimation, ranking, and grooming practices that stick
- ◆ Definition-of-done and workflow-state design per team
- ◆ Velocity, cycle-time, and flow dashboards for continuous improvement
- ◆ Coaching for scrum masters, product owners, and team leads

06 GET MORE FROM PLANMAGNET

Insights & AI Enablement

We help you put your work data to work — delivery dashboards, forecasting, and AI-assisted planning — as a governed roadmap, so decisions move from gut-feel to evidence without overstating what exists today.

WHAT YOU GET

- ◆ Dashboard setup for velocity, cycle time, throughput, and flow
- ◆ Forecasting and capacity modelling against your real history
- ◆ AI ticket-drafting, summarisation, and risk-flag enablement as it ships
- ◆ Reporting cadences and executive-ready views
- ◆ Honest current-vs-roadmap framing so expectations stay accurate

08 GET MORE FROM PLANMAGNET

Security, RBAC & Governance

We configure PlanMagnet to your compliance bar — least-privilege roles across teams, projects, and guests, audited actions, and governed access — inherited from the Burdenoff platform rather than re-invented.

WHAT YOU GET

- ◆ Workspace RBAC role design and least-privilege access reviews
- ◆ Project isolation and guest/external-collaborator scoping
- ◆ Audit-log review, retention configuration, and evidence workflows
- ◆ SSO, provisioning, and identity-lifecycle alignment
- ◆ Data-protection and subprocessor alignment for your jurisdiction

09 GET MORE FROM PLANMAGNET

Training & Team Enablement

We get your product managers, engineers, and leaders genuinely productive — not just logged in. Role-based sessions and golden-path playbooks so a new PM ships a roadmap and a new engineer works the board in hours.

WHAT YOU GET

- ◆ Hands-on workshops for product, engineering, and leadership
- ◆ Golden-path playbooks for roadmaps, sprints, and releases
- ◆ GraphQL, CLI, MCP, and SDK enablement for technical teams
- ◆ Admin and governance training for workspace owners
- ◆ Onboarding checklists and curated learning paths

SECTION 04 • SERVICE TRACK

Powered by PlanMagnet

Done-for-you outcomes we deliver using the product — rollouts, integrations, and a managed PMO — so you can focus on building.

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- 02 Implementation & Rollout
 - 04 Integrations & Developer Platform
 - 07 Managed PMO & Operations

02 POWERED BY PLANMAGNET

Implementation & Rollout

Our team stands up your PlanMagnet workspace end to end and rolls it out across teams — boards, backlog, roadmaps, automation, and integrations configured — so you launch with a working system of record, not a blank workspace.

WHAT YOU GET

- ◆ Workspace, project, and board setup configured to your process
- ◆ Backlog and roadmap structure with initiatives, epics, and OKRs
- ◆ Automation rules for routing, status sync, and escalations
- ◆ Phased rollout plan with pilot teams before org-wide adoption
- ◆ Cutover support so the first sprint runs cleanly on day one

04 POWERED BY PLANMAGNET

Integrations & Developer Platform

PlanMagnet is API-first and GraphQL-based. We connect it to the rest of your stack — source control, CI/CD, chat, identity, and analytics — through its built-in integrations and API, so commits update tickets, deploys close releases, and work data flows instead of being re-keyed.

WHAT YOU GET

- ◆ Git and pull-request linking so commits update the right items
- ◆ CI/CD wiring so deploys can advance releases automatically
- ◆ Chat (Slack/Teams) and notification integrations
- ◆ Webhook and event configuration for downstream systems
- ◆ GraphQL API guidance for connecting your own systems, plus SSO/identity setup

07 POWERED BY PLANMAGNET

Managed PMO & Operations

Prefer to focus on building? We run the planning backbone for you — keeping the roadmap current, backlog groomed, automation healthy, and reporting flowing — acting as an embedded, on-demand PMO on top of PlanMagnet.

WHAT YOU GET

- ◆ Roadmap and OKR upkeep across teams
- ◆ Backlog grooming, triage, and prioritisation support
- ◆ Automation, integration, and workflow maintenance
- ◆ Scheduled health checks, hygiene reviews, and reporting
- ◆ Usage and adoption reporting back to your leadership

05 Two ways to work with us

POWERED BY PLANMAGNET

We set it up with you — workspaces, integrations, and rollout

Our team works alongside yours to stand up your planning system on PlanMagnet. Projects, boards, roadmaps, automation, and integrations are configured to your process and validated with a pilot team before the whole org moves over.

- ◆ Workspace, project, and board setup configured to your process
- ◆ Backlog, roadmap, OKR, and automation configuration
- ◆ Phased rollout so the first sprint runs cleanly on day one

POWERED BY PLANMAGNET

Or hand us the PMO — managed planning operations

When you would rather focus on building, we run the planning backbone for you. We keep the roadmap current, the backlog groomed, automation healthy, and reporting flowing — acting as an embedded, on-demand PMO with usage and adoption reporting back to your leadership.

- ◆ Roadmap, OKR, and backlog upkeep across teams
- ◆ Automation, integration, and workflow maintenance
- ◆ RBAC-scoped, fully audited access — never shared credentials

06 How we engage

A clear path from intent to impact. The same loop whether it is a one-week workspace stand-up or a multi-quarter org-wide rollout — scoped, reviewable, and audited at every step.

01

Discover

We map your teams, rituals, tools, and goals — and agree on what “done” looks like before any work starts.

02

Plan

A scoped, reviewable plan: workspace and project model, workflows, integrations, RBAC, and rollout sequence — with checkpoints where it matters.

03

Build

We configure the workspace, migrate your data, wire integrations, and validate with a pilot team — shipping in increments you can see.

04

Operate

We hand over with docs and enablement, or stay on as an embedded PMO — monitored, audited, and reporting from the first day.

07 Enablement & support

GET MORE FROM PLANMAGNET

We leave your team able to run it without us

Every engagement ships documentation, golden-path playbooks, and hands-on enablement. Whether you keep us on as an embedded PMO or take the keys yourself, your product managers, engineers, and leaders understand the platform — not just the dashboard.

- ◆ Role-based workshops for product, engineering, and leadership
- ◆ GraphQL, CLI, MCP, and SDK enablement so teams extend it themselves
- ◆ Onboarding checklists and curated learning paths

SUPPORT & SLAS

From standard support to priority response with defined SLAs, we keep your planning system running — incident response, upgrade guidance, and a named point of contact for enterprise engagements.

Tiers are scoped to your plan and operational needs.

PRICING

Services pricing is not published. **Contact us** to scope an engagement.

NEXT STEP

Let's scope what you need

Tell us about your teams, tools, and goals. We will recommend the right mix of consulting, implementation, operations, and enablement — and a plan to get there.

TALK TO OUR TEAM

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GET STARTED FREE

app.planmagnet.com

SERVICES ONLINE

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