

Organization and Productivity Software for Individuals and Businesses.

PlanPlus Online is planning software, PLUS a progressive set of productivity, collaboration, and CRM (Customer Relationship Management) features that allow you to better organize your personal life, your professional life, or your entire company. The same productivity engine used successfully by over 15 Million people to achieve extraordinary levels of effectiveness is now available in a digital version and is part of every edition of PlanPlus Online.

Build upon the habits of individual effectiveness in your organization and create a Culture of Productivity™ with PlanPlus Online. The only business crm software that combines robust collaboration and customer relationship management tools with a time tested personal productivity planning engine. PlanPlus Online has the power to transform your business.

Check out the descriptions and feature matrix below to determine the edition that fits best for you.

■ PERSONAL PLANNER Edition:

Superior productivity through effective planning for Individuals. A digital alternative to your paper planner. This edition includes the core productivity features that you need to organize your calendar, tasks and notes and provides planning features like daily and weekly planning wizards, mission statement builder, goals, and weekly compass.

■ PROFESSIONAL Edition:

All-in-one business productivity software for busy professionals. One software solution for organizing activities, relationships, sales, and projects. Includes all the features of the Personal Planner PLUS productivity features that working professionals need such as contact manager, sales opportunities, projects, and Microsoft Outlook or Google integration.

■ BUSINESS CRM Edition:

The Ideal CRM for Companies, the only all-in-one business software for collaboration and Customer Relationship Management that includes the FranklinCovey planning methodology. This edition includes all features of the Personal and Professional edition including modules for sales automation, email marketing, customer support, project management, website integration, surveys, PLUS personal planning features for each user.

All editions are available to access anywhere, anytime through any internet connected device. There is no need to install software on your computers and no hardware or software to maintain. Your data is stored securely in the cloud and is backed up regularly. We even add new features and enhancements four times per year, all this included for your surprisingly affordable subscription price. That means you can focus more of your time on the things that matter most and get greater productivity and higher effectiveness.



	Personal Planner	Professional	Business CRM
Choose the edition that best fits your needs.	Organize You	Organize Your Work	Organize Your Company
	For individuals, a digital alternative to your paper planner.	Personal Planner PLUS Productivity features to organize your work life.	Professional PLUS collaboration & CRM features to organize your Company.
	\$69.99 User / Year that's only \$5.83 / Month	\$35 User / Month OR \$350 User / Year	From \$200 / Month (includes first 5 users) Additional users \$59.95 / Month
Planning Wizards & Mission Builder	✓	✓	✓
Calendar	✓	✓	✓
Daily & Master Task Lists with ABC-123 Prioritization	✓	✓	✓
Goal Tracker	✓	✓	✓
Notes	✓	✓	✓
Weekly Compass Planning	✓	✓	✓
Alerts & Reminders	✓	✓	✓
Task Delegation w/ External Update	✓	✓	✓
Mobile Access	✓	✓	✓
iCal Calendar Integration	✓	✓	✓
Email Center & Email Templates		✓	✓
Outlook & Google Integration		✓	✓
Project Management & Project Templates		✓	✓
Share Projects Externally		✓	✓
Project Portal & Time Sheets			✓
CRM & Collaboration Features		✓	✓
Contacts & Accounts/Organizations		✓	✓
Contact/ Organization Tree View		✓	✓
Document Attachments		✓	✓
Custom Fields & Configurable Page Layouts			✓
Opportunity Tracking, Sales Forecasts & Pipeline Reports		✓	✓
Action Sheets			✓
Competitor Tracking & Reports		✓	✓
Quotes, Products, & Price Lists		✓	✓
Customizable Sales Processes		✓	✓
Email Templates		✓	✓
Lead Management		✓	✓
Website Form Integration		\$	✓
Dashboards			✓
Scheduled Reports			✓
Role Based Access Permissions		✓	✓
Territory Assignment Engine			✓
Industry Templates		**	✓
Lead Boomerang			✓
Email to Lead			✓
Marketing Module with Blast & Drip Email Campaigns			*
Email Template Library			✓
Time Sheets & Reports			✓
Helpdesk Module: Case Management & External Portal			\$
Knowledge Base Builder			\$
Web Service APIs for Integration			\$
Dedicated Instances, or On Premise Install Option			\$
Email Support	✓	✓	✓
Priority Phone Support & Designated Account Manager			✓
System Requirements	All editions work with any web browser, Mac or PC and include secure hosting and regular data backup		

- ✓ Included in base price * Additional fee may apply based on usage for email templates
 \$ Additional fee may apply ** Industry templates available for many industries, contact sales for details.