

A photograph of two women in a modern office environment. One woman, wearing a blue jacket and glasses, is pointing at a laptop screen while the other woman, in a black top, looks on attentively. The background shows a bright, open-plan office with glass partitions and plants.

# Priority Matrix + Teams

**Project, Email, and Meeting Management to Help You Focus on What Matters Most**

- ✓ **Microsoft 365 Security Certified**
- ✓ **Microsoft Outlook Editor's Choice**

# What is Priority Matrix?

- **SaaS for Managing Emails, Meetings and Project**
- Leading software for prioritization
- Email prioritization in Outlook
- Meeting agenda for Teams
- Central location for status updates
- Version control and audit history

The screenshot displays the Priority Matrix web application interface. At the top, there is a navigation bar with the 'Priority Matrix' logo and menu items: Chat, My Projects, One on One, My Team, Feed, Calendar, Help, and About. Below this is a secondary navigation bar for the current project, 'Prep for pre construction', which includes a search icon, a dropdown menu, and an 'Add item' button. The main workspace is divided into two columns: 'Do Now' and 'Do Later'. The 'Do Now' column contains two items: 'Estimate project cost' (due in 11 days) and 'Assign site manager' (due in 11 days). The 'Do Later' column contains three items: 'Create working schedule for construction' (due in 21 days), 'Stakeholder meetings' (due in 2 months, with a 15% progress indicator), and 'Formulate budget' (due in 2 months). A 'Delegate' section is visible at the bottom of the 'Do Now' column, and a 'Contacts for site' section is at the bottom of the 'Do Later' column. On the right side, a detailed view for the 'Estimate project cost' item is shown, including the owner's name, progress (40%), effort, start date (February 20, 2021 12:00 AM), due date (March 6, 2021 1:00 AM), and a chat window with a message from Erica B. asking for an excel budget template.

# Project, Email, Meeting Management - All in One

- Task and project management
- Gantt charts
- Weekly agenda
- Priority task list
- Dashboard view
- Workload management
- One-on-One view
- Intelligent meeting agenda
- Project and team reports
- External collaboration

The image displays three overlapping screenshots of the Appfluence software interface, illustrating its capabilities in project, email, and meeting management.

The leftmost screenshot shows a dashboard view with sections for "WEEKLY", "ACTIVE TEAMMATES - 8", and "ITEM STATUS BY TAG".

The middle screenshot shows a "My Team" view with "Team Activity" for Alex Moreno, David Martin, Demo User, and Erica Beaulieu. It includes an "Invite" button.

The rightmost screenshot shows a Gantt chart for "Prep for pre construction" with a task list on the left and a chat window on the right.

Task name	Status
Prep for pre construction	40%
Estimate project cost	15%
Stakeholder meetings	0%
Assign site manager	0%
Create working schedule for con	0%
Formulate budget	0%

# Fully Integrated into Microsoft Teams and Outlook

- ✓ **Microsoft 365 Security Certified**
- ✓ **Microsoft Outlook Editor's Choice**
- ✓ Deep Office / Teams/ Graph / Outlook integrations + E5 features
- ✓ One-click install across organization
- ✓ Can be used by almost all job functions at most industry verticals

Priority Matrix Chat My Projects One on One My Team Feed Calendar Help About

My Team

Team Activity

This is what your teammates are working on. Invite anyone who should be in Priority Matrix for easier collaboration.

Alex Moreno  
alex

No shared, recently active items.

David Martin  
david

Demo User  
demoaccou

Erica Beaulieu  
erica

Freight  
freigh

Invite

Prep for pre construction

Name	%	Modified	Due ↑
Formulate budget	50%	2/23/2021	4/25/2021
Stakeholder meetings	15%	2/23/2021	4/24/2021
Create working schedule for construction	30%	2/23/2021	3/16/2021
Assign site manager	5%	2/23/2021	3/6/2021
Estimate project cost	40%	2/23/2021	3/6/2021



# Big Opportunity to Upsell and Cross-sell for CSP



## High Margin

Premier partners can **earn 30% margin** on Priority Matrix Pro, Business, and Enterprise for Microsoft Teams and Outlook. Partners earn on initial licenses and **license upgrades for 2 years**.



## Easy Onboarding

Priority Matrix has an easy trial-upgrade cycle as short as 2-weeks. Customers can self on-board and we provide training, webinars, videos, templates to customers and partners. **CSP partners can minimize time on support.**



## Broad Customer Base

Priority Matrix is used by thousands of tenants on Microsoft Teams and Outlook. Priority Matrix has thousands of paying customers **across all verticals, and can be used by any company using Office.**

# Target Customer Scenarios

Global Logistics Management	I.T Project Management	Project Management
Global team at a leading coffee logistics company uses PM and Office to manage critical projects across the world.	I.T. team of a utility company uses PM and Office to manage and prioritize complex projects to serve internal customers.	Real estate investment company uses PM and Office 365 / Teams for project management to track and audit all action items.

## Target Customer Scenarios

- Is challenged by managing priorities and action items across many projects
- Faces difficulties in creating alignment and communicating changes
- Wants fewer but more effective tools to reduce context switching
- Wants better integrations to manage Outlook emails and Teams meetings

Key Verticals	ALL / RET, MFG, CON, FIN
Key BDMs	CXO, IT
Competition	Trello, Asana, Planner, Homegrown Apps, Sticky Notes

# Demo Credentials / License Requirements

- Licensing options. Free product trial and demo.
  - Pro license: \$7/user/month or \$60/user/year
  - Business license: \$12/user/month or \$108/user/year
  - Fixed Cost Enterprise Examples (business features for all users):
    - Companies <1,000 employees: \$50,000/year
    - Companies <5,000 employees: \$150,000/year
- Enterprise features
  - Mandated SSO, single-tenant Azure deployment, PowerApps integrations, Custom reports
- Does PM work on Azure?
  - Yes. PM can be custom deployed on single-tenant Azure environment for enterprise customers. Pricing is enterprise pricing + Azure hosting cost + Margin

# Contact

- CSP Partner Lead
  - Hai Nguyen, [hai@appfluence.com](mailto:hai@appfluence.com)
- <https://appfluence.com/csp>
- Video: [Priority Matrix for Microsoft Teams](#)
- Video: [Everything You Need to Know About PM in 3 Minutes](#)



# Backup

# Key Benefits to Customers

## Time Savings

Customers report 2.5 hours per person per week of time saving.

## Less Context Switching

Everything can be done inside Teams and Office – use fewer apps, get more done.

## Productivity Intelligence

Access “related items” so that you always have the right context to do the right things

*“With Priority Matrix, I have full visibility into all projects at any given time. The simplicity to manage and track projects from any platform is one of the main reasons I use Priority Matrix. In addition, with Priority Matrix, we collaborate in real time; this is extremely helpful when you are solving complex issues that require an immediate response.”*

- Luis Maciel, Director of IT

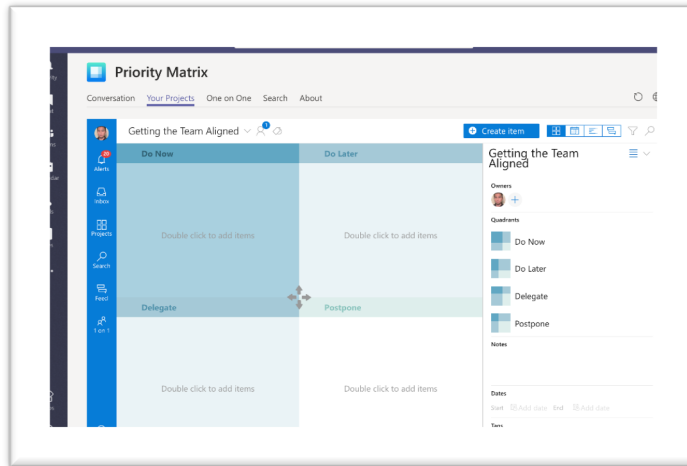
# What Will Priority Matrix Do for You?

- Strengthens Office 365 cloud offering
- Priority Matrix solution applies to any company of any size that uses project management, email management, or task management
- Priority Matrix is a featured ISV for Microsoft Teams
- Priority Matrix drives 3<sup>rd</sup> party Teams engagement and incentivizes companies to transition to Office 365 / Outlook 365 more quickly

*“Priority Matrix is a comprehensive integration for Microsoft Teams and the Microsoft Office platform. Being able to manage emails, access and create tasks in meetings as well as see priorities across my team and project without switching context shows the power of what Teams and Priority Matrix can do together.”*

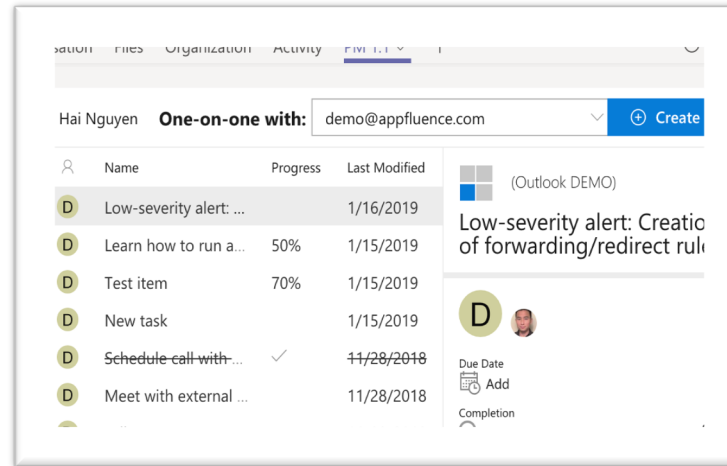
Mike Ammerlaan, Director - Microsoft Office 365 Ecosystem

# Prioritization is hard. Priority Matrix makes it easy.



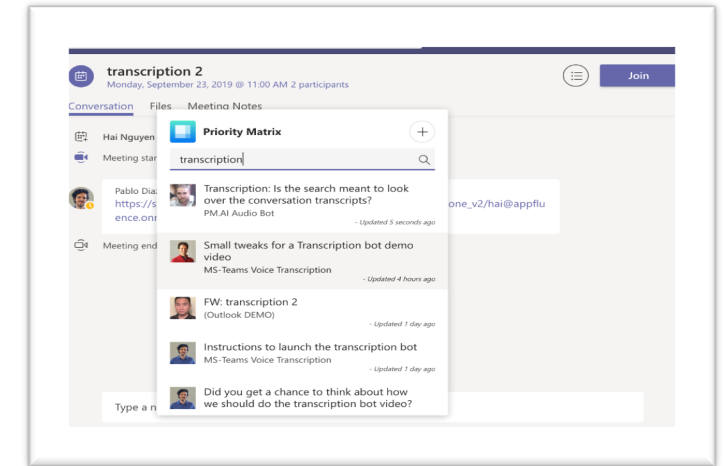
## Built for Teams

Seamless project management solution embedded inside Teams and Outlook without context switching.



## One-on-One

Innovative visualization of shared tasks, files, and action items with team members across Graph and Priority Matrix.



## Contextual Intelligence

Surfaces tasks relevant to the email you're browsing or the conversation you're having so you can stay focused. Always.

# Sales Support Materials

- Sample Sales Deck and One Pager are available and updated on a quarterly basis
- Video: [Priority Matrix for Microsoft Teams](#)
- Video: [Everything You Need to Know About PM in 3 Minutes](#)