

 **monday.com**

A platform built for
a new way of working



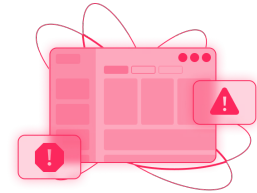
Software should empower your organization, not hold it back



Too many disparate
tools creating siloed
teams and data



Rigid tools that limit the
ability to execute and
reach full potential



Complex tools with
difficult implementation
and maintenance slow
teams down

Your software should
drive growth and
support business goals





Built for flexibility and scale



One connected,
high-performing
workforce



Streamlined
end-to-end
processes and
workflows



Quick and informed
decision-making

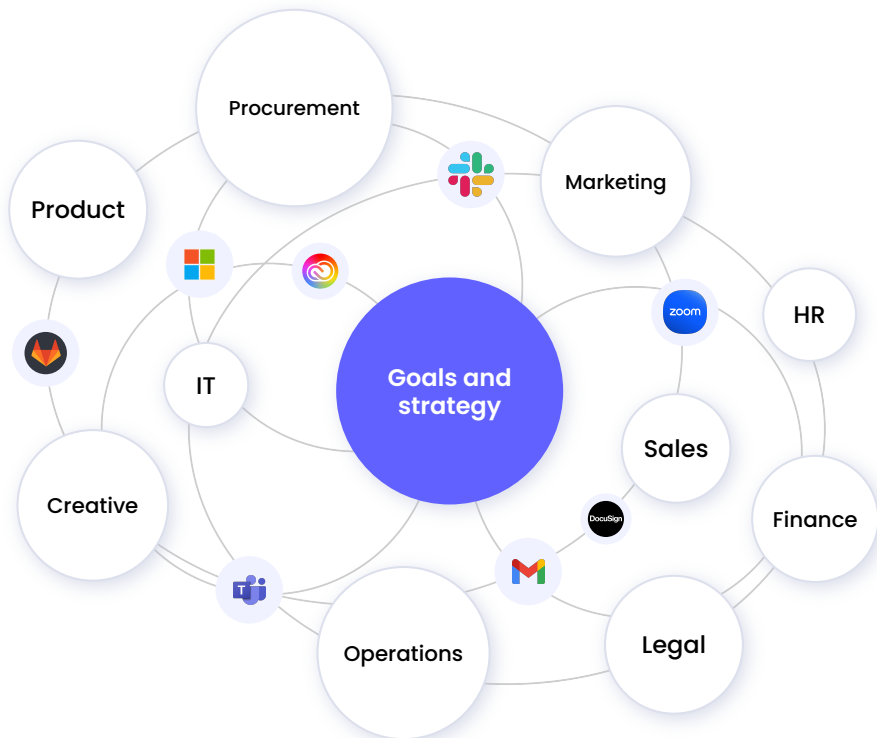


Full visibility of
performance, results
and resources

One connected, high-performing workforce

Connecting teams and tech

to create one high-performing workforce



“

We have a lot more cohesion, a lot more collaboration, even if we're not in the same room

Tye Rapley-Hawkins

Head of Delivery, Priority by O2

 Telefónica

Streamlines end-to-end processes and workflows

Manage your value streams in one place

Streamline your entire network of workflows and processes

Procurement: From request to purchase

Stakeholder request → Procurement assessment → Legal approval → Finance approval → Purchase and record keeping

Campaign management: From brief to analysis

Ideation and brief → Ad copy → Ad design → Campaign management → Marketing analysis

Candidate process: From posting to onboarding

Job description → screening → Hiring manager interview → References and committee → Onboarding process

Marketing events: From ideation to leads

Planning and project management → Budget management → Registration → Post event follow-up

Supply chain management: Order to fulfill

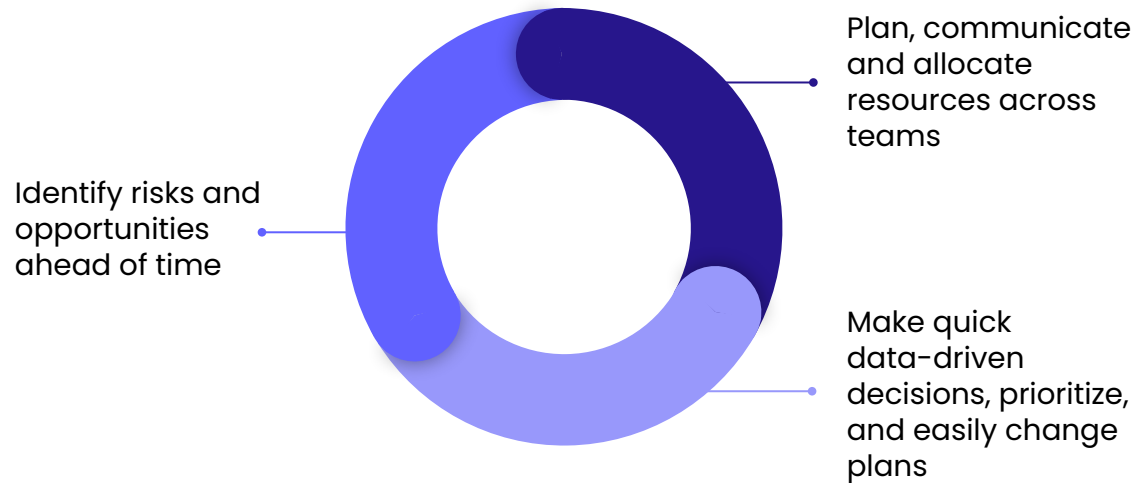
Supplier management → Inventory management → logistics and scheduling → receivable to cash

Lead generation: Lead to account management

Ads and gated content → SDR Qualification → Discovery → Sales → Post sale and account management

Quick and informed decision-making

Make quick and informed decisions that are easy to implement across teams



“

It delivered us a whole load of information that we didn't know before, which **allows us to work out how efficiently we operate** — where the blockers are, where we may need more resources, and where there's capacity to do more.

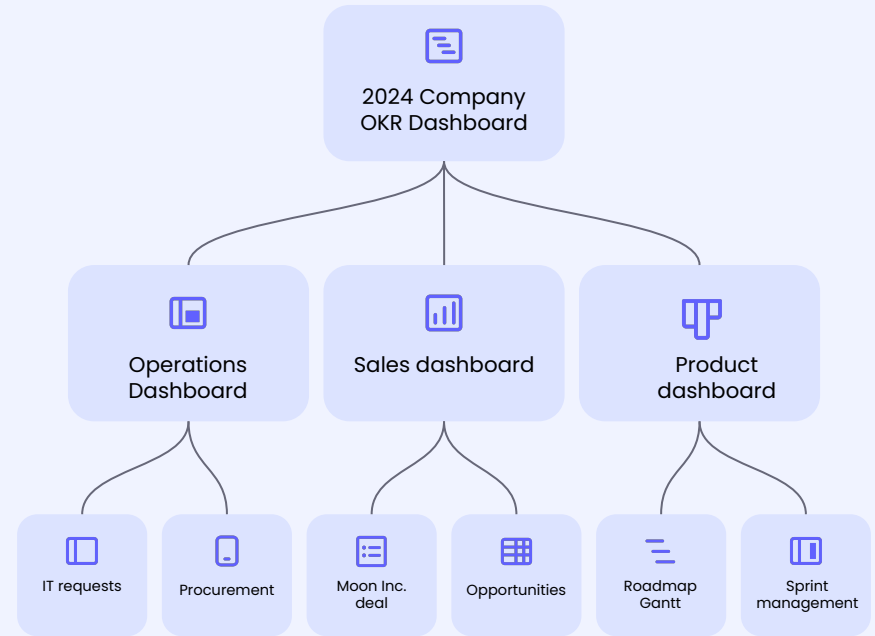
Luis Clark
Commercial Business Development Director



Full visibility of your progress, results, and resources

Get full visibility into your organization's progress and performance

- Get high-level visibility into performance across teams and department
- Leverage real-time data whenever you need it
- Gain deeper insights to optimize your strategy and forecast future needs and resources
- Easily showcase reports for important stakeholders



Streamlined processes across every business function

Product

Creative

Operations

Procurement

IT

Legal

Marketing

Finance

Goals and strategy

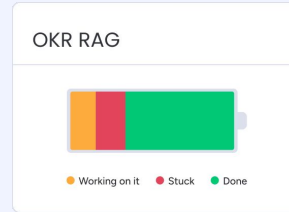
HR

Sales

Goals and OKRs

Define your own strategy and ensure everyone is working towards unified goals

- Align departments with high-level goals and objectives.
- Empower teams to execute a shared strategic vision.
- Track performance against long-term objectives.
- Easily build dashboards and reports to share with stakeholders.



See demo

< Back

Objective Overview

2023 Objectives

	Owner	Timeline	Status
Finalize kickoff materials	[Avatar]	[Progress Bar]	Done
Refine objectives	[Avatar]	[Progress Bar]	Working on it
Identify key resources	[Avatar]	[Progress Bar]	Done
Test plan	[Avatar]	[Progress Bar]	Stuck
Update contractor agreement	[Avatar]	[Progress Bar]	Done
Conduct a risk assessment	[Avatar]	[Progress Bar]	Working on it
Monitor budget	[Avatar]	[Progress Bar]	Working on it
Develop communication plan	[Avatar]	[Progress Bar]	Done
+Add item			

workcanvas.com

OKR Planning

Create template

The screenshot shows the WorkCanvas OKR Planning interface. On the left, there is a sidebar with various tool icons. The main area is divided into two panels. The left panel, titled 'OKR LOGISTICS', contains a table with columns for 'When' (Date, Date, Date, Date, Throughout the Quarter) and rows for 'What', 'Who', and 'How'. The right panel, titled 'OKRs', shows a hierarchical flowchart with a central 'Parent company' node branching into '3-year company', '3-year division', and '3-year team' nodes, which further branch into '3-year objective' and '3-year team' nodes.

When	Date	Date	Date	Date	Throughout the Quarter
What	OKR	OKR1	OKR alignment	OKR1 OKR2 and other objectives	OK weekly sync
Who	Team 1	Team 1 Team 2	All	Team 1 Team 2	All
How	Align OKR1 and OKR2 to OKR	OKR1 OKR2 OKR3, OKR4, OKR5, OKR6, OKR7, OKR8, OKR9, OKR10	OKR1 OKR2 OKR3 OKR4 OKR5 OKR6 OKR7 OKR8 OKR9 OKR10	OKR1 OKR2 OKR3 OKR4 OKR5 OKR6 OKR7 OKR8 OKR9 OKR10	OK weekly sync

Marketing

Strategize, execute, and track all of your marketing efforts in one place

- Get a high-level overview of your marketing performance.
- Manage end-to-end processes across marketing functions.
- Run your content and social media calendars.
- Centralize all of your digital assets in one accessible place.
- Edit, proof, and approve all marketing assets.
- Allocate and assign resources for incoming marketing initiatives.

See demo < Back

Hi @May, can you make this part a bit darker and add some purple to it?

Like Reply

May Sure, I'm on it!

Also @May, maybe we can make the BG a bit more colorful?

Like Reply

Creative brief form

Request name

New FB campaign

Email

Hi @Design team, We'd love to start working on a new campaign.

Reference

New FB campaign

100% Print Download Delete

When **Status** changes to **Ready for review**, assign **Manager as Owner**

+ Add to board

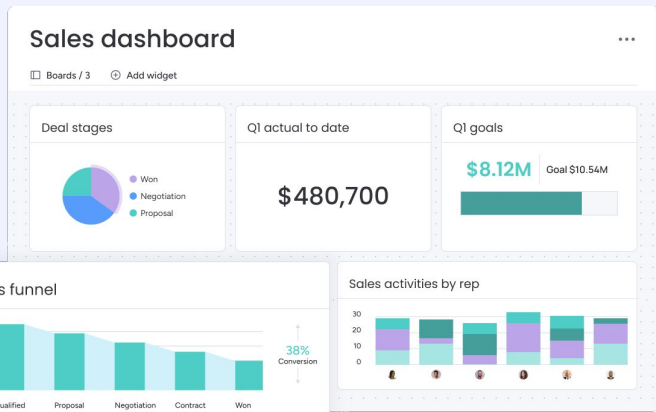
Sales

Manage your entire sales process from lead capturing to account management

- Manage every aspect of the sales cycle in one place.
- Gain deeper insights into your team's performance, activities, pipeline, revenue, expected collection, and more.
- Go beyond the initial sale with account management, clients projects, and collection tracking in one centralized place.

See demo

< Back



Mass email message

To: 498 recipients

Subject:

Hi {first_name},
My name is {My first name} and I'm a product consultant at moon.io. I tried giving you a call earlier but wasn't able to reach you. Are you available on {1 business days from now} or {2 business days from now}? Feel free to book a time with me here: {My meeting url}.

Best,
Daniel

Powered by **monday** sales CRM

Send

Deals

Main table Pipeline Forecast + Integrate

Active deals		Owner	Contacts	Stage	Close Probability
Twister Sports			Madison Doyle	Qualified	80%
Ridge Software			Phoenix Levy	Proposal	60%
Bluemart			Lellani Krause	Negotiation	40%

Closed won		Owner	Contacts	Stage	Close Probability
Yelloworks			Amanda Smith	Won	100%
Sheleg Industries			Jamal Ayers	Won	100%
Zift Records			Elian Warren	Won	100%
Waisman Gallery			Sam Spillberg	Won	100%
SFF Cruise			Hannah Gluck	Won	100%

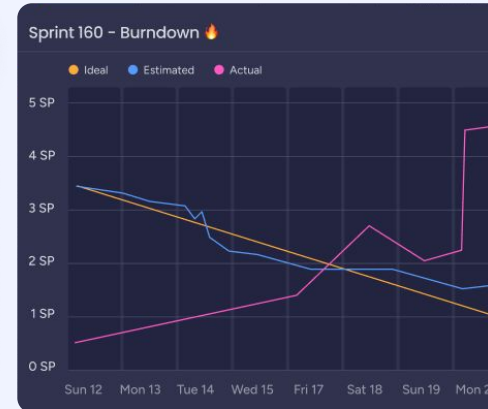
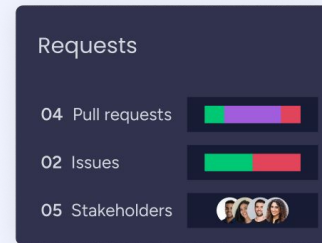
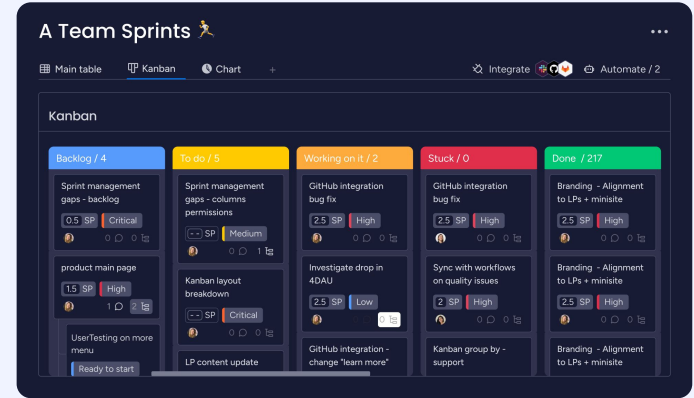
Product & R&D

Run your end-to-end product lifecycle from ideation to deployment

- Plan, prioritize, and map your product vision into a share roadmap.
- Break down your vision into actionable sprints, and work in any methodology you prefer.
- View your roadmap progress, understand who's doing what, gain clarity on estimated vs. actual effort.

See demo

< Back



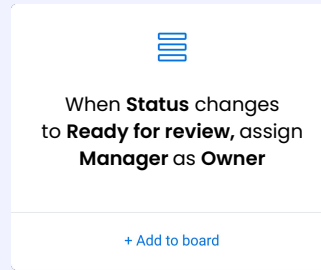
Project portfolios

Manage everything – from standalone projects to complex portfolio management

- Track project portfolio and performance and value.
- From intake requests to project closure, manage all aspects of the project lifecycle.
- Get a snapshot of the health of your projects and identify risks.
- View and manage resources across projects based on availability and skills.

See demo

< Back

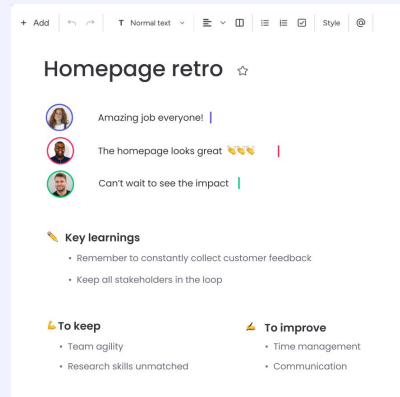


When **Status** changes to **Ready for review**, assign **Manager as Owner**

+ Add to board

Team workload

	Week 24 Jun 12 - June 18	Week 25 Jun 19 - June 25
Eddie	13	0
Kimberly	13	0
Alex	0	10
Yael	13	0



Homepage retro

Amazing job everyone! |

The homepage looks great 🙌🙌🙌 |

Can't wait to see the impact |

Key learnings

- Remember to constantly collect customer feedback
- Keep all stakeholders in the loop

To keep

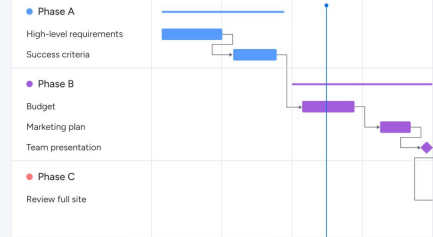
- Team agility
- Research skills unmatched

To improve

- Time management
- Communication

Team planning

Team iteration



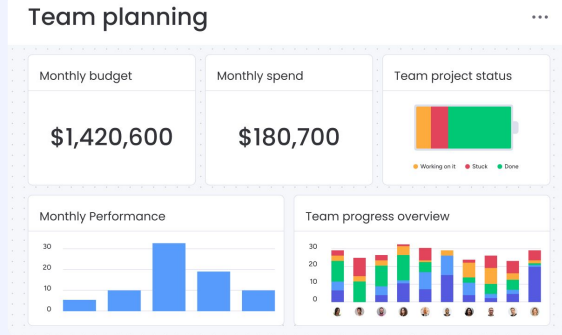
IT & Operations

Efficiently manage operations across the company to support business goals

- Improve operational efficiency in processes across the organization.
- Improve collaboration between departments and facilitate smooth cross-functional processes.
- Intake, manage, and provide visibility into IT, operations, and facility requests from start to finish.

See demo

< Back



IT ticket request

Name

Email

Address

Add screenshot

Submit

Order form

Please submit this form if you would like LMH swag

Name

Jaydin Gross

Size

jaydin.g@gmail.com

Which color

Show options

+ Add

- Kickoff
- ✓ Checklist
- Budget and tasks
- Next steps
- Data

Event planning checklist

Kickoff

- Event name: Brainstorm ideas
- John OOO 7/5
- Sales offsite 24/5
- Design hackathon 29/5

✓ Checklist

- Get speakers
- Find food vendors
- Locate venue
- Plan email campaigns

HR

Manage the entire employee lifecycle from recruitment to ongoing development

- Manage and optimize your employee recruiting processes, while seamlessly working with hiring managers across the org.
- Get new hires onboarded and up-to-speed, faster.
- Manage the performance review process in one accessible place.
- Get incoming HR requests, PTO, benefits and more and manage them end-to-end.

See demo

< Back

Headcount planning

Hiring calendar



Headcount

Owner	Floor	Site
	29	NY
	34	Tokyo
	Make sure to review	Done

Budget per department

\$180,700

Budget spent by team



Performance breakdown



Application form

Name

Answer will be written here

Email

Answer will be written here

Address

Resume

Add files

Cover letter

Employee Directory

This month

	Owner	Location	De
Laurel Richmond		8502 Preston Rd. In...	
Joe Dalby		2464 Royal Ln. Mes...	Op
Dylan Lenon		2118 Syracuse, Co...	
Emma Levi		833 Alexander Av...	
Joe Dalby		8502 Preston Rd. In...	
Nicole Mor		2464 Royal Ln. Mes...	Op
Gina Snyder		2118 Syracuse, Co...	Op
Albert Wilkinson		833 Alexander Av...	

Legal

Streamline your legal processes and align with businesses objectives

- Maintain corporate compliance and provide legal consultation in the context of each project, process, or campaign.
- Streamline the legal review and approval processes to ensure that nothing falls between the cracks.
- Manage legal request intake from employees across the organization.

See demo

< Back

Legal requests

Main table Gantt Kanban + Integrate Automate / 2

New tickets	Owner	Timeline	Status	Created on	Priority	Files	+
Please approve the contract		<div style="width: 50%;"></div>	New	Sep 02	High		
Set monthly goals		<div style="width: 50%;"></div>	New	Sep 06	Medium		
Approve the software I want to..		<div style="width: 50%;"></div>	New	Sep 15	High		

Working on it	Owner	Timeline	Status	Created on	Priority	Files	+
Privacy center		<div style="width: 75%;"></div>	Working on it	Oct 04	Low		
Can I use this client logo?		<div style="width: 50%;"></div>	Working on it	Oct 07	Medium		

Done	Owner	Timeline	Status	Created on	Priority	Files	+
Customer review		<div style="width: 100%;"></div>	Done	Nov 08	High		
Approve software		<div style="width: 100%;"></div>	Done	Nov 12	Medium		

Legal Case Management

Boards / 3 Add widget

Progress chart

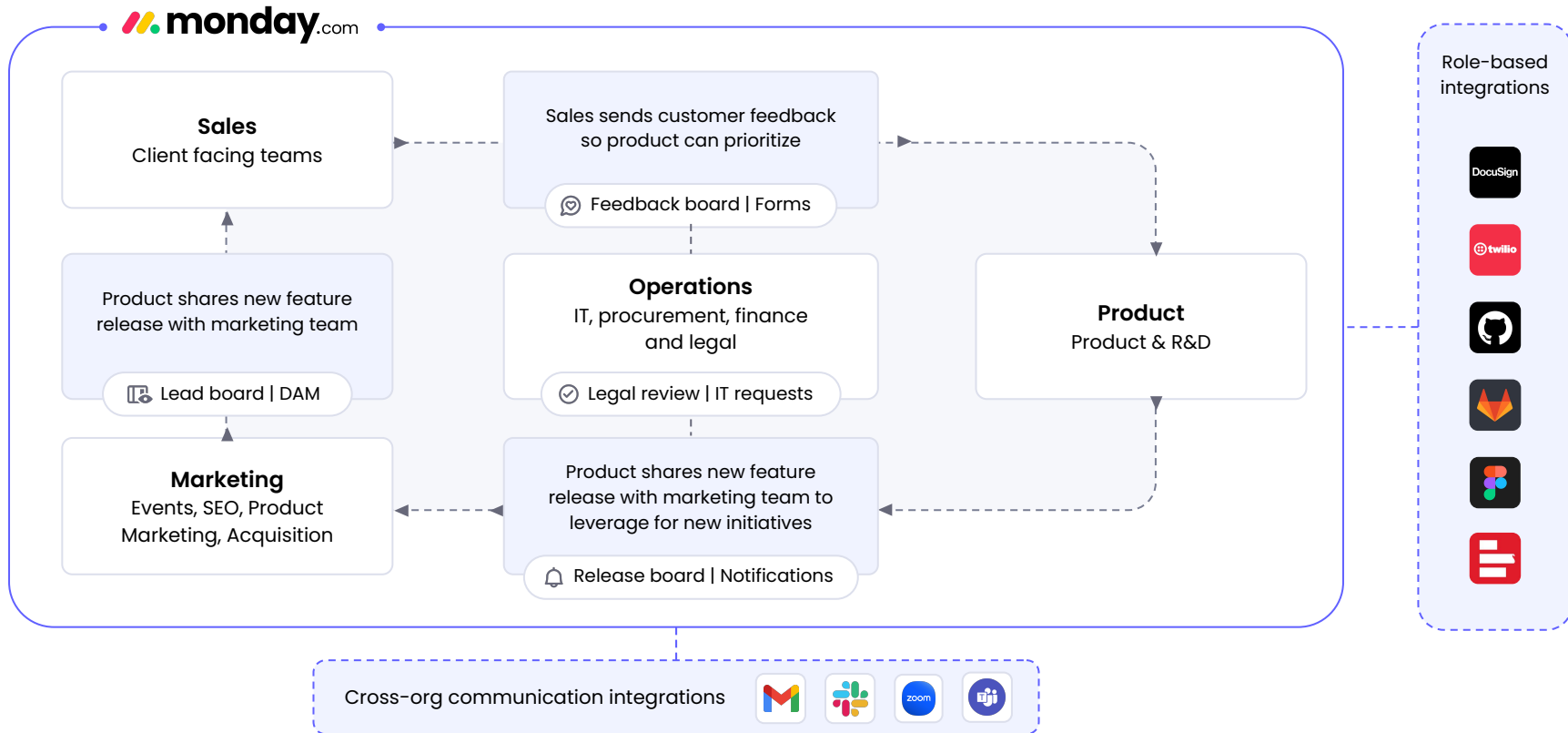


Law category



Connect teams across your organization

Workflow example



Consolidate your tech stack with monday.com



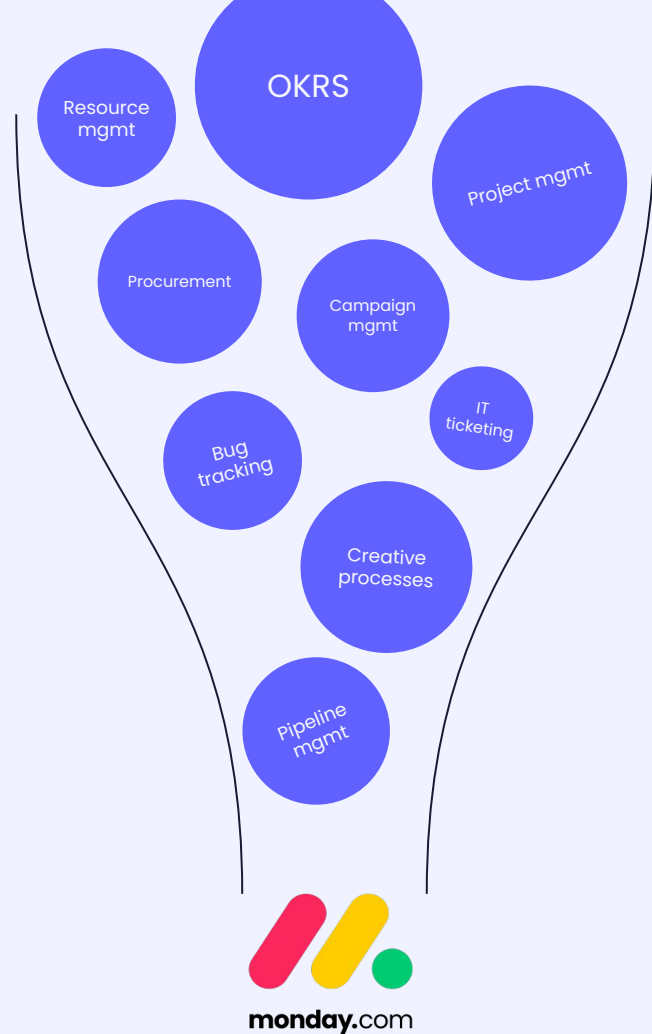
Build a lean, consolidated tech stack for collaboration, speed and transparency



Minimize maintenance costs of multiple tools, from training, services, integrations, and headcount



Streamline data and operate with one centralized source of truth



About [monday.com](https://www.monday.com)

Hypergrowth, year over year

200+

industries

200+

countries across
the world

70%

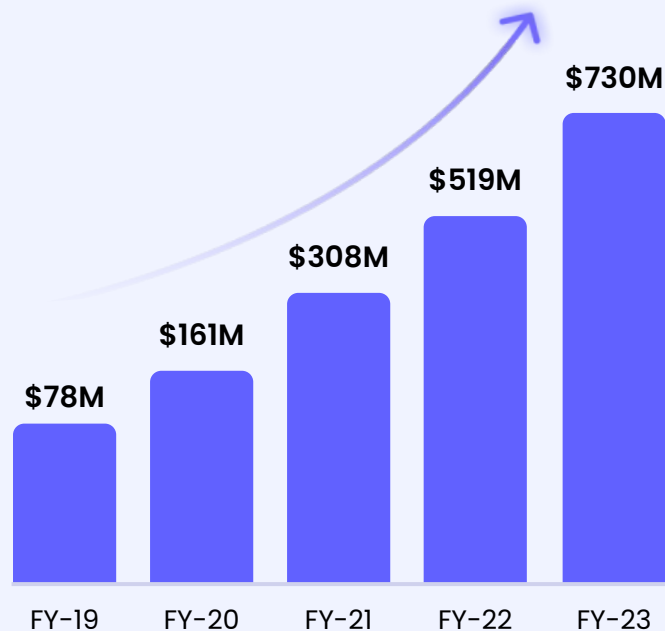
non-tech industries

56%

YoY increase in
enterprise customers



Consistent revenue growth in
any climate



61% of the Fortune 500 choose monday.com

225K

customers

200+

industries

200+

countries across
the world



PAPA JOHN'S



Canva



nielsen

Wix

outbrain



LIONSGATE

NHS



Glossier.



FLIGHT CENTRE

Here's what analysts and customer are saying

Figure 1: Magic Quadrant for Collaborative Work Management



monday.com recognized as a Leader in the 2023 Gartner® Magic Quadrant™ for Collaborative Work Management

Gartner



G2 ranked monday.com as a market leader across 18 different categories



Forrester Total Economic Impact™ research: Motorola sees 346% ROI with monday.com

FORRESTER



Capterra shortlisted monday.com in 8 software categories

Capterra

monday.com, powered by monday.com

Get a glimpse how we use the platform ourselves

[See us in action >>](#)

Marketing and creative

- Design requests & management
- DAM
- Creative production
- Content calendar
- Event management
- Influencer management
- SEO tracking and management



Finance

- Accounts receivable
- Payroll management
- Purchasing & bookkeeping
- Revenue management



Procurement

- Requests
- Approval process
- Vendor risk management
- Admin & license management
- IT systems management



Legal

- Commercial requests
- Privacy programs
- Due diligence management
- IP portfolio management
- Corporate compliance
- Legal resource directory



Operations

- Workplace ticketing
- Office visitor management
- Travel management
- Interior design & construction
- Facilities index



PR

- Agency management
- Internal speaker pool
- Journalist relationship management
- Interior design & construction
- Communications index



CS

- Portfolio management
- QBR planning
- Implementation & onboarding
- Renewal forecasting
- CSAT surveys



IT

- Help desk
- Employee lifecycle
- Inventory & orders
- Change management
- IT incidents



R&D

- Product roadmap
- Sprint management
- Backlog management



Cross org

- OKRs
- Program management
- Company updates

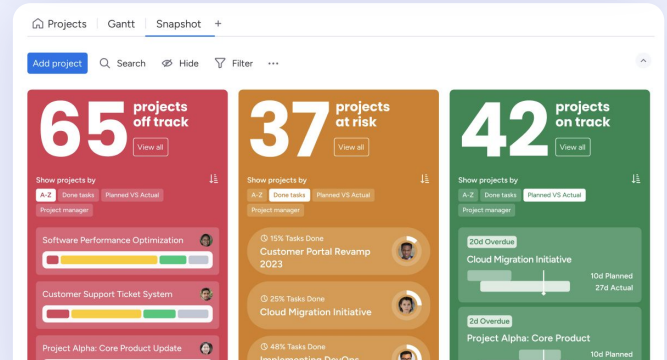
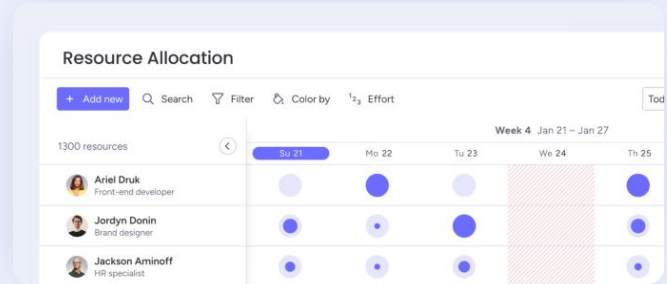
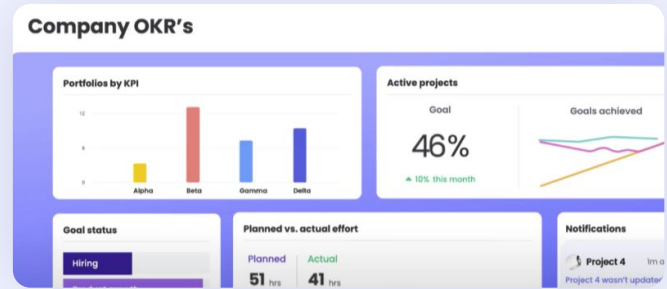


monday.com product suite



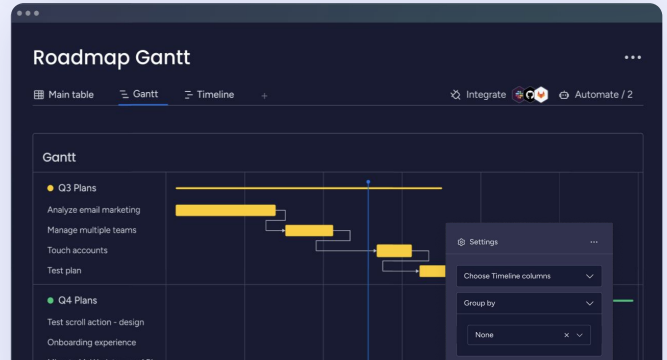
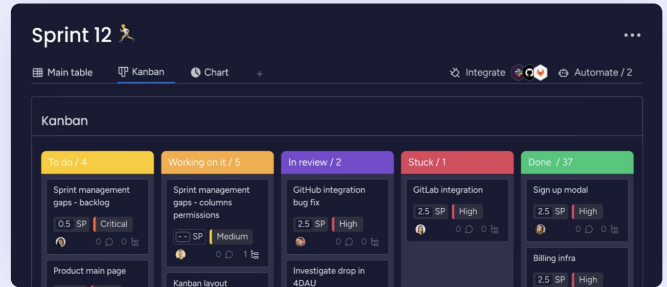
From strategy to delivery, power work at every level of the organization

- Goals and OKRs
- Project & portfolio management
- Client projects
- Business operations
- Resource management
- Task management



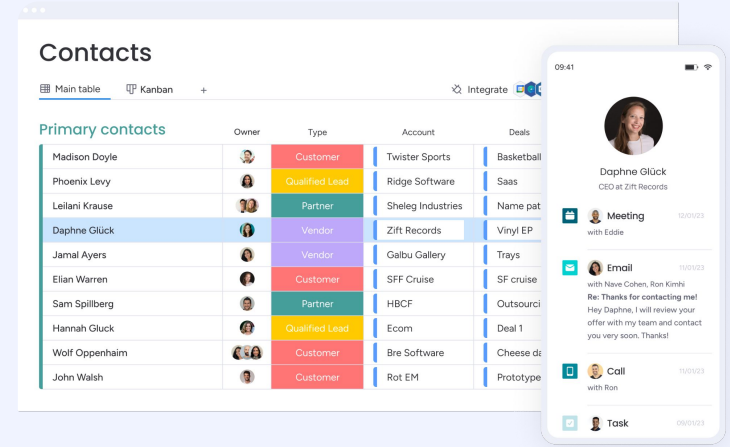
From ideation to launch, your product development cycle in one connected place

- Product ideation & discovery
- Establish roadmap
- Sprint management
- Monitor bugs & issues
- Product release & feedback



From lead to post-sale activities, your entire sales cycle in one intuitive place

- Leads & deals management
- Pipeline & targets management
- Sales operations
- Mass emails & Marketing
- Contact & account management



Contacts

Main table Kanban + Integrate

Primary contacts

Owner	Type	Account	Deals
Madison Doyle	Customer	Twister Sports	Basketball
Phoenix Levy	Qualified Lead	Ridge Software	Saas
Leilani Krause	Partner	Sheleg Industries	Name pat
Daphne Glück	Vendor	Zift Records	Vinyl EP
Jamal Ayers	Vendor	Galbu Gallery	Trays
Eilan Warren	Customer	SFF Cruise	SF cruise
Sam Spillberg	Partner	HBCF	Outsourci
Hannah Glück	Qualified Lead	Ecom	Deal 1
Wolf Oppenheim	Customer	Bre Software	Cheese dr
John Walsh	Customer	Rot EM	Prototype

Mobile view snippet:

09:41

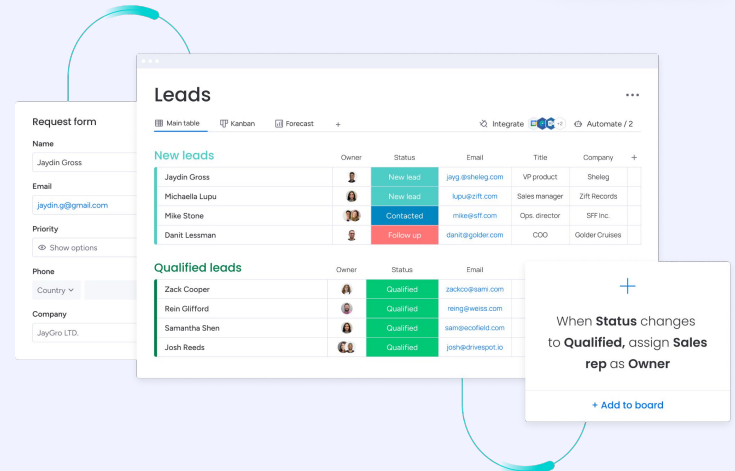
Daphne Glück
CEO at Zift Records

Meeting with Eddie 10/09/23

Email with Nave Cohen, Ron Kimb 10/09/23
Re: Thanks for contacting me! Hey Daphne, I will review your offer with my team and contact you very soon. Thankst

Call with Ron 10/09/23

Task 10/09/23



Leads

Main table Kanban Forecast + Integrate Automate / 2

New leads

Owner	Status	Email	Title	Company
Jaydin Gross	New lead	jydg@stheleg.com	VP product	Shelag
Michaela Lupu	New lead	klupu@zift.com	Sales manager	Zift Records
Mike Stone	Contacted	mike@stf.com	Ops. director	SFF Inc.
Danit Lessman	Follow up	danit@goldier.com	COO	Goldier Cruises

Qualified leads

Owner	Status	Email
Zack Cooper	Qualified	zackcooper@sam.com
Rein Gifford	Qualified	reng@weiss.com
Samantha Shen	Qualified	sam@ecofield.com
Josh Reeds	Qualified	josh@drivespot.io

Request form

Name: Jaydin Gross

Email: jaydin.g@gmail.com

Priority: Show options

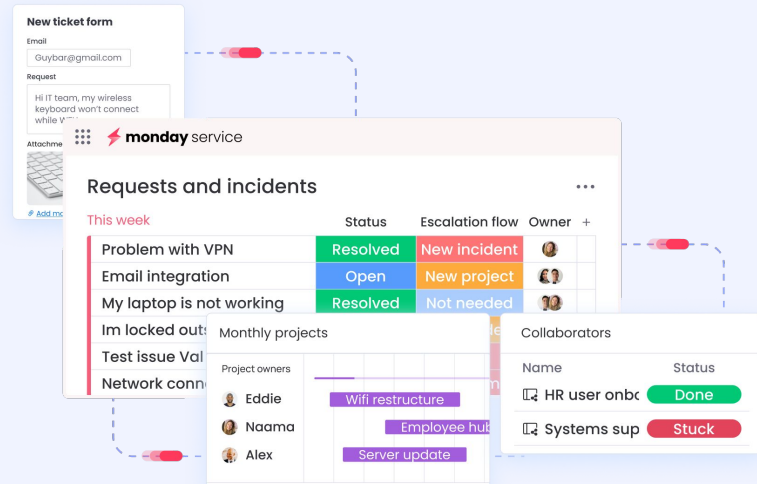
Phone: Country JayGo LTD.

Company: JayGo LTD.

Automation rule: When Status changes to Qualified, assign Sales rep as Owner. + Add to board

From request to resolution, accelerate and improve your service performance

- Ticket management
- Multichannel support
- Knowledge management
- Customer portal
- SLA management

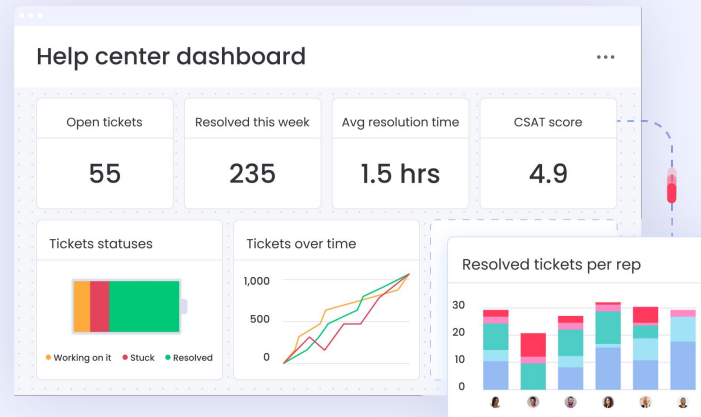


The screenshot displays the Monday Service interface. At the top left, there is a 'New ticket form' with fields for 'Email' (Gluybar@gmail.com) and a 'Request' section containing the text: 'Hi IT team, my wireless keyboard won't connect while V...'. Below this is an 'Attachments' section with a keyboard icon. The main part of the interface is a 'Requests and incidents' table with columns for 'This week', 'Status', 'Escalation flow', and 'Owner'. The table contains the following data:

This week	Status	Escalation flow	Owner
Problem with VPN	Resolved	New incident	[Avatar]
Email integration	Open	New project	[Avatar]
My laptop is not working	Resolved	Not needed	[Avatar]
Im locked out			
Test issue Val			
Network conn			

Below the table, there is a 'Monthly projects' section with a list of project owners: Eddie, Naama, and Alex. Each owner has associated project tasks: Eddie has 'Wifi restructure', Naama has 'Employee hui', and Alex has 'Server update'. To the right, there is a 'Collaborators' section with a table showing the status of various users:

Name	Status
HR user onbc	Done
Systems sup	Stuck



The screenshot shows the 'Help center dashboard' with several key metrics and charts:

- Open tickets:** 55
- Resolved this week:** 235
- Avg resolution time:** 1.5 hrs
- CSAT score:** 4.9

Below the metrics, there are three charts:

- Tickets statuses:** A horizontal bar chart showing the distribution of tickets across 'Working on it' (orange), 'Stuck' (red), and 'Resolved' (green) categories.
- Tickets over time:** A line chart showing the trend of tickets over time, with the y-axis ranging from 0 to 1,000.
- Resolved tickets per rep:** A stacked bar chart showing the number of resolved tickets per representative, with the y-axis ranging from 0 to 30.

All on top of one powerful platform



**Flexible
building blocks**



**Robust monday
Database**



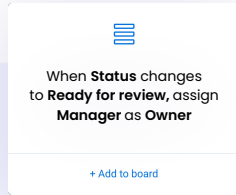
**AI-powered
tools**



**Intuitive user
experience**

Flexible building blocks

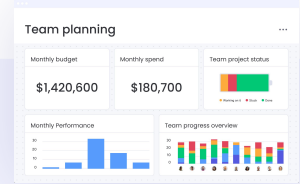
Visualize, connect and streamline work with customizable building blocks



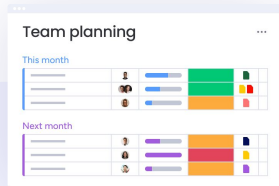
Automations



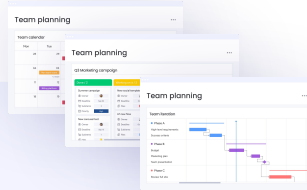
Integrations



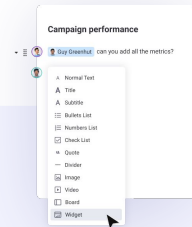
High-level dashboards



Unlimited boards to shape any workflow



Multiple ways to view data, projects and processes



Collaborative, interactive docs

AI-powered tools

Supercharged your work with monday AI

Automate work, enhance your content, and spark new ideas with monday AI.

[Learn more >](#)

Get a head start

Turn project ideas into actionable tasks in seconds.

Make your message stand out

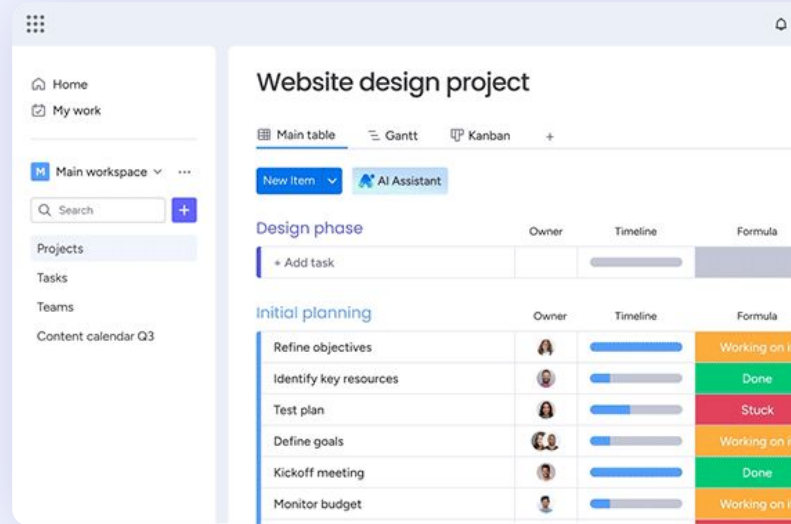
Rephrase text to say exactly what you mean before you hit send.

Generate compelling content

Turn your ideas into polished content with AI, from blog articles to ad copy.

Craft complex formulas

Expert or not, monday AI suggests formulas that best fit your use case.



A platform your teams will love



Delightful
user experience



Rapid deployment and onboarding



High adoption by tech and
non-tech teams



Simple to set up and easy
to customize



Everyone onboarded really, really fast. We literally built this PPP loan process out over a weekend.

monday.com is just so intuitive and easy to use.

It's like an iPhone in a way in that you just know how and what you want to do next.

Anastasia Blaylock
Director of Treasury Management

