

Executive Summary

[MilestonePlanner](#) is a Software as a Service (SaaS) project and portfolio planning and collaboration tool, focused on timelines, outcomes, milestones and actions. Developed and located in the UK, it is used by businesses and government departments around the world to enable them to be more efficient and effective.

About SocialOptic

MilestonePlanner is developed and operated by [SocialOptic](#), an ISO 9001, ISO 27001 and Cyber Essentials Plus certified UK business established in 2009. SocialOptic builds Software as a Service solutions that enable people to work more efficiently and effectively, enabling them to gather, understand and communicate information, improving collaboration, communication and decision making.

SocialOptic's team has decades of experience in managing highly challenging, business-critical products and services, with specialisms that range from psychology to program management. All data centres are located in the UK, and all software development is carried out within the UK.

SocialOptic delivers solutions using the latest web-technologies, big data and human insight.

Service Overview

MilestonePlanner is a simple and easy way to visually plan and co-ordinate work. MilestonePlanner is delivered as Software as a Service (SaaS), providing project and portfolio management to track milestones, actions, goals or workstreams and responsibilities for one or many projects.

Invite a team, set milestones, assign actions, then track and update progress. Optionally, MilestonePlanner can sync plans into a desktop calendar, and also provides RSS activity feeds. MilestonePlanner has a RESTful API to enable integration with other systems, if required.

MilestonePlanner can automatically generate weekly reports, and email a snapshot of plans to include in presentations, documents or emails. Milestone Planner allows you to instantly share plans in real-time, in a way that is secure and accessible from any device with a web browser.

- Secured with the highest level of SSL encryption and digital certificates.
- Hosted and centralised, keeping your plans in sync.
- Automatic back up, with full change history.
- Granular access control and permissions per project.

Features

Timeline View

View milestones arranged on a linear time-line and grouped into workstreams. Adjust milestone dates by simply clicking and dragging, or with your finger on a touch-screen device. Simply drag and drop milestones between workstreams to organise the project, or to assign new milestone owners. Focus on specific milestone owners or group the timeline by owner to balance resources and quickly identify bottlenecks.

Milestones View

View milestones by status, date, owner, workstream, update time, or as a kanban. Views can be filtered by milestone owner, and completed milestones can be hidden, to enable efficient project reviews and planning updates. Milestone status descriptions can be customised on a per project basis, as required.

Actions View

Similarly to milestones, actions can be grouped by date, owner, workstream or last update time and filtered by owner. Actions can contain sub-actions, with as many levels of nesting as required.

Activity Dashboard

The user dashboard lets users see changes to any of their milestones or actions, and to update newly assigned items. Users can add comments to milestones and actions, and update estimated dates.

Reporting and review

MilestonePlanner generates:

- a summary report, providing the current status of a project at-a-glance, including over all progress, the balance of backlog versus completion

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and progress against actions.

- clear activity reports, providing an overview of changes made since any given date (the last week by default).
- detailed status reports, showing which milestones and actions were due, which were completed and which are overdue; status reports can be generated for any date, and any time period.
- progress graphs charting project progress, slippages and increasing or decreasing backlog.

MilestonePlanner greatly reduces the overhead of project planning, while providing greater visibility and accountability into the planning process. It automates reporting, freeing up time and expertise to focus on successfully achieving team goals and delivering projects predictably and in an effectively managed way.

MilestonePlanner enables project plans and milestones to be used as repeatable templates, greatly reducing the time needed to create new plans. All changes are tracked, enabling more effective project reviews and allowing changes to be undone.

Technical Requirements

The only technical requirements for MilestonePlanner are a web browser and Internet connectivity. No additional software or browser plugins are required. MilestonePlanner is supported on all modern web browsers. At the time of submission, the following browsers are supported:

- Chrome
- Microsoft Edge
- Firefox
- Safari

MilestonePlanner can be used even over very low bandwidth connections, and can cope with intermittent connectivity, due to its automatic "offline" and "low bandwidth" features. MilestonePlanner is designed to be able to run on tablets and low power Netbooks, Chromebooks and tablets as well as laptop and desktop Windows, Linux or macOS machines.

On-boarding

An email address is all that is required to set up an account. Logins are created instantly and both video and application tutorials are available on account creation.

The process for inviting new users to a plan on MilestonePlanner is straight forward, and achieved by simply entering their email address via the normal user interface. There is an optional import service to automate transferring plans from legacy spreadsheets.

Offboarding: Data Sovereignty and Exit

We believe in total data portability. Our offboarding process ensures that your transition away from the service is as seamless and secure as your arrival.

- **Data Portability and Export:** Upon notice of termination, users maintain full access for a 30-day "Transition Period" to export all Content and Data in structured, machine-readable formats (e.g., CSV, JSON).
- **Secure Deletion:** Following the transition period, and in compliance with the Data Use and Access Act 2025, SocialOptic will permanently and securely purge all client data from its active systems, unless a legal retention period applies.
- **Final Certification:** We provide a formal certificate of data destruction upon request, confirming that all sensitive employee insights have been removed in line with our ISO 27001 standards.

Our customer success team are always happy to help with onboarding or offboarding, and there is no charge for exporting data.

Information Assurance

As an organisation SocialOptic is committed to delivering quality and information security and is Cyber Essentials Plus and IASME certified. Our data centres operate to ISO9001, and have ISO27001 and ISO14001 accreditations. We are continually evaluating ways to enhance and improve the security of MilestonePlanner. All connections are secured using TLS (SSL) and digital certificates to provide enhanced data assurance.

Backup, Restore, Availability and Disaster Recovery

All data is synchronised to the MilestonePlanner cloud, as well as being retained locally within the user's machine or web browser (local data can be cleared if required). MilestonePlanner saves a full history of all changes, and data is replicated to mirror servers in real-time, with periodic snapshots exported to back up servers. All services are mirrored, and MilestonePlanner

clients have the ability to store data locally, indefinitely, should they be unable to connect to the MilestonePlanner cloud. Data is resynchronised once connectivity and availability is restored. The MilestonePlanner cloud and recovery servers target 99.99% availability.

Support and Service Levels

We pride ourselves on our friendly and effective customer service and support. Standard support hours are from 8am to 6pm Monday to Friday, excluding bank and public holidays. The service is available on a 24x7 basis, and monitored 24x7 via the SocialOptic service assurance infrastructure, and support requests can be raised electronically 24x7. Requests are processed within 4 hours of receipt, with in office hours.

The MilestonePlanner client and web application will continue to work, even during a loss of connectivity or data centre failure, as data is stored locally within the application or web browser until connectivity is restored, when it will resynchronise. MilestonePlanner targets 99.99% availability on a monthly basis.

Our support service includes telephone, email and web-based support for all issues and queries. Calls are handled by our highly skilled staff, all experienced with using MilestonePlanner. Users are supported via 4 channels:

- Telephone support, available during normal business hours, voice-mail service during out of hours.
- Email, which generates a support ticket and alerts that an issue has been logged.
- In-app / Web-based feedback system which generates a support ticket.
- Auto-diagnostics - the application auto-detects errors and automatically creates a support ticket on error.

Call severity will be categorised under the following three levels:

- Severity 1 – Complete loss of service affecting multiple users. Response time < 30 minutes
- Severity 2 – Partial loss of service affecting a minority of users. Response time < 60 minutes
- Severity 3 – Loss of service affecting individual users. Response time < 4 hours.

MilestonePlanner includes simple tools allowing the system administrators

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to carry out their own administration tasks such as adding or removing user accounts, and there is a self-service mechanism for resetting passwords.

Consumer Responsibilities

Service consumers are responsible for network connectivity to the network edge, any necessary risk assessment, and providing a functioning web browser with Internet Access.

Training

MilestonePlanner has an intuitive user interface, and has been designed to require minimal training, but where required SocialOptic will work to agree any specific training requirements. This can be done by arrangement on-site, at a third party venue, or online. Our video training guides also provide supplementary training, and can be accessed free of charge. Additional training pricing is provided in the pricing document.

Ordering and Invoicing Process

Invoicing is on an annual basis, based on the peak number of user accounts. Accounts are charged per billing period. Users can be added or removed via the administrator page without notice. Our standard invoicing terms are 30 days.

Termination Terms

If no longer required, individual accounts can be terminated on demand, payment will only be due for the current billing period. Bulk export of data is available on request, and user level data export is available via the normal user interface.

Pricing

See separate pricing document

Contact Us

Further information can be found at <https://milestoneplanner.com/>