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March 10th - 12th, 2026, Dallas, TX

Planon NA 2026 User Conference



Planon Roadmap

Jay Shah

Director Solutions & Customer Growth, North America

An *Incredible* Year in the Rear-View Mirror



Released Features

547



Customer Ideas

162

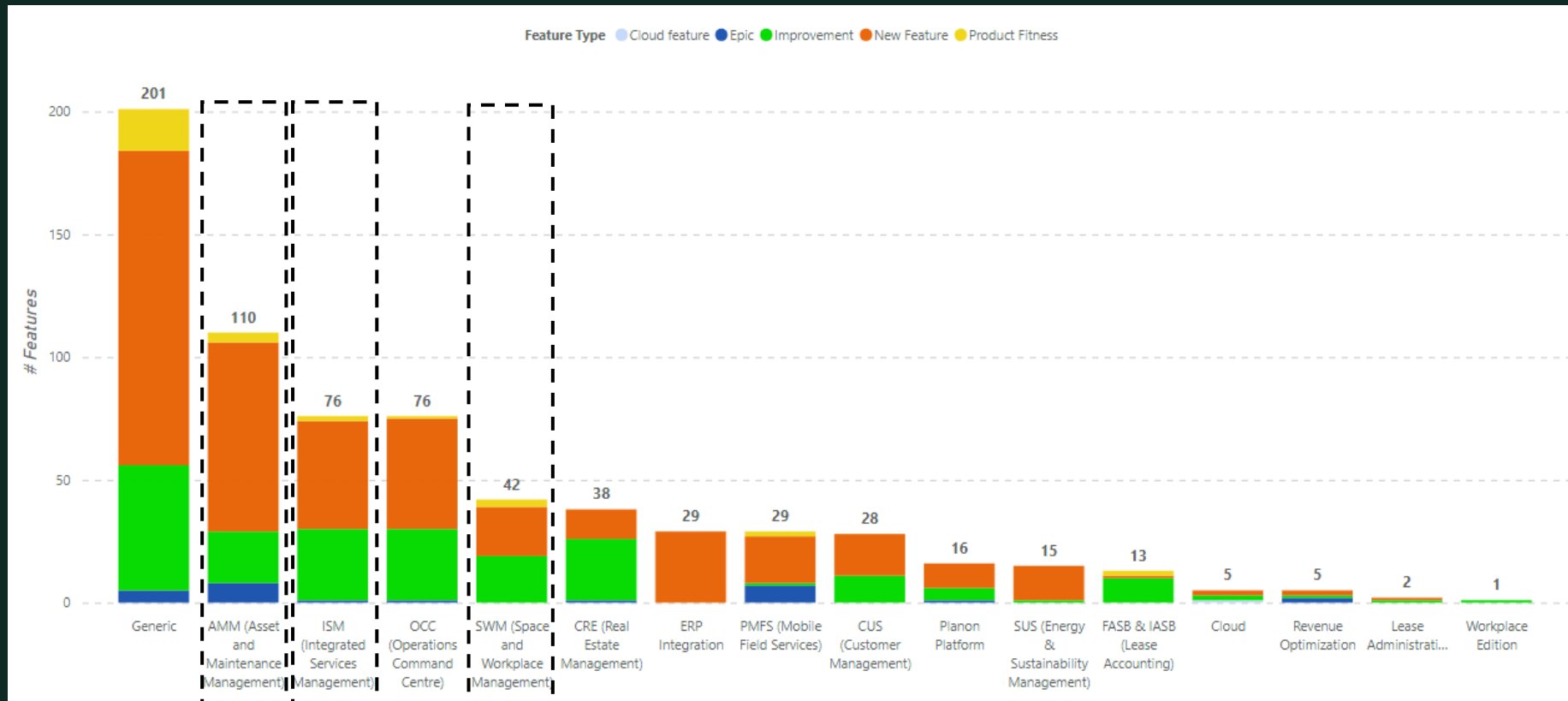
Of total: 30%



Most-used Solutions

228

Of total: 42%



Next Generation Maintenance Management

Asset Strategy Objectives

Register and manage assets based on asset quality, performance, condition, and compliance requirements.

Consolidated Asset Data

Register and manage assets assigned to buildings, spaces, or predefined categories.

Asset Life Cycle Workflows

Turn observations and assessments into actions based on organizational asset strategy objectives.

The image displays the Planon Assets Pro web interface and four mobile app screens. The web interface shows a list of assets with columns for Code, Description, Start date, and End date. The mobile screens show a 'My Jobs' list with a 'Select' button, a 'Download work assignments' button, and a 'Downloaded' status.

Mobile Assessments

Capture asset and facility assessments and observations for use in asset strategy objectives.

Enterprise Activity Planning

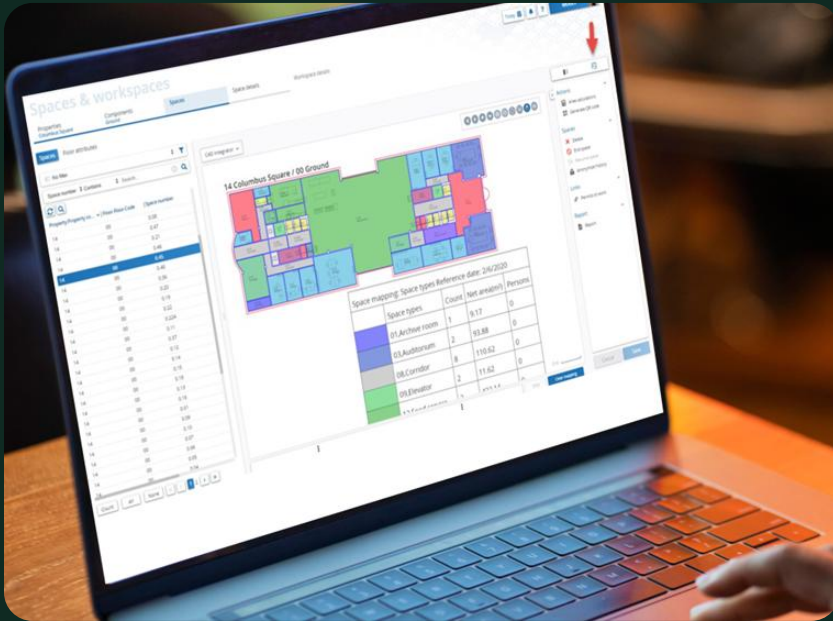
Define and select the scheduling scenario that best fits asset strategy objectives.

Mobile Field Services App

Download multiple work orders at once before traveling to a non-WIFI zone.

Improved Space Management

Empowering space teams at every step of their journey

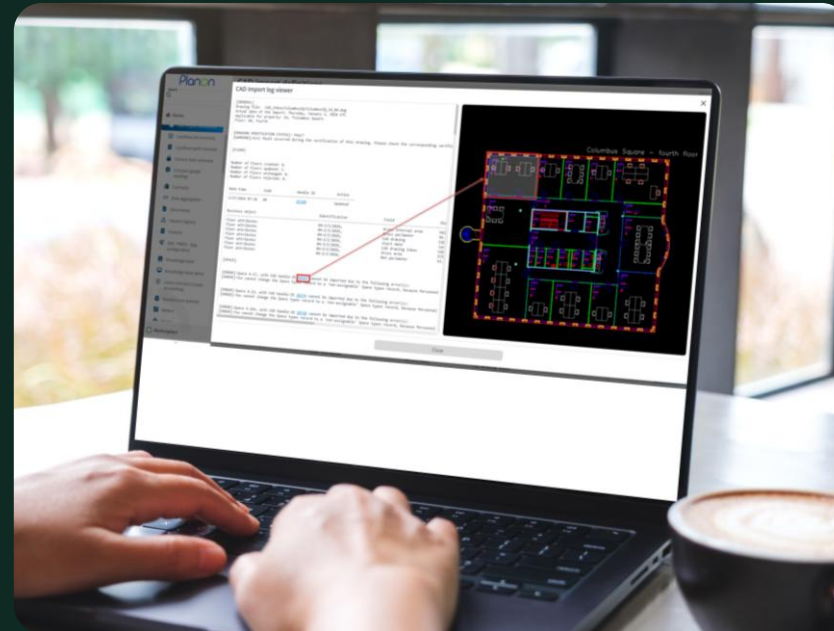


CAD Import

- Validate DWG files in Planon and visualize issues on a floorplan

Move Management

- Graphically visualize spaces to move employees
- Support neighborhood moves



Planon IOT

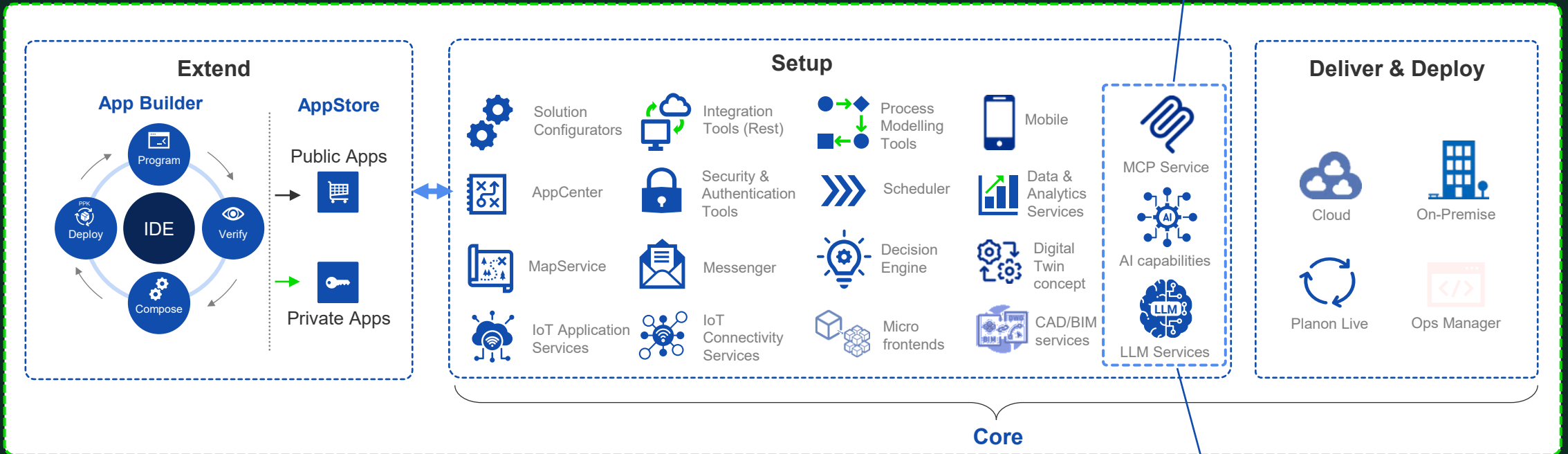
- Extended filtering possibilities for Digital Twins
- Security and logging improvements

Space Management

- Navigate directly to occupancies from Departments or Cost centers
- Support BOMA area standard

Most disruptive innovation in the last decade: Planon Open Platform

Now *Built-In* with Planon AI

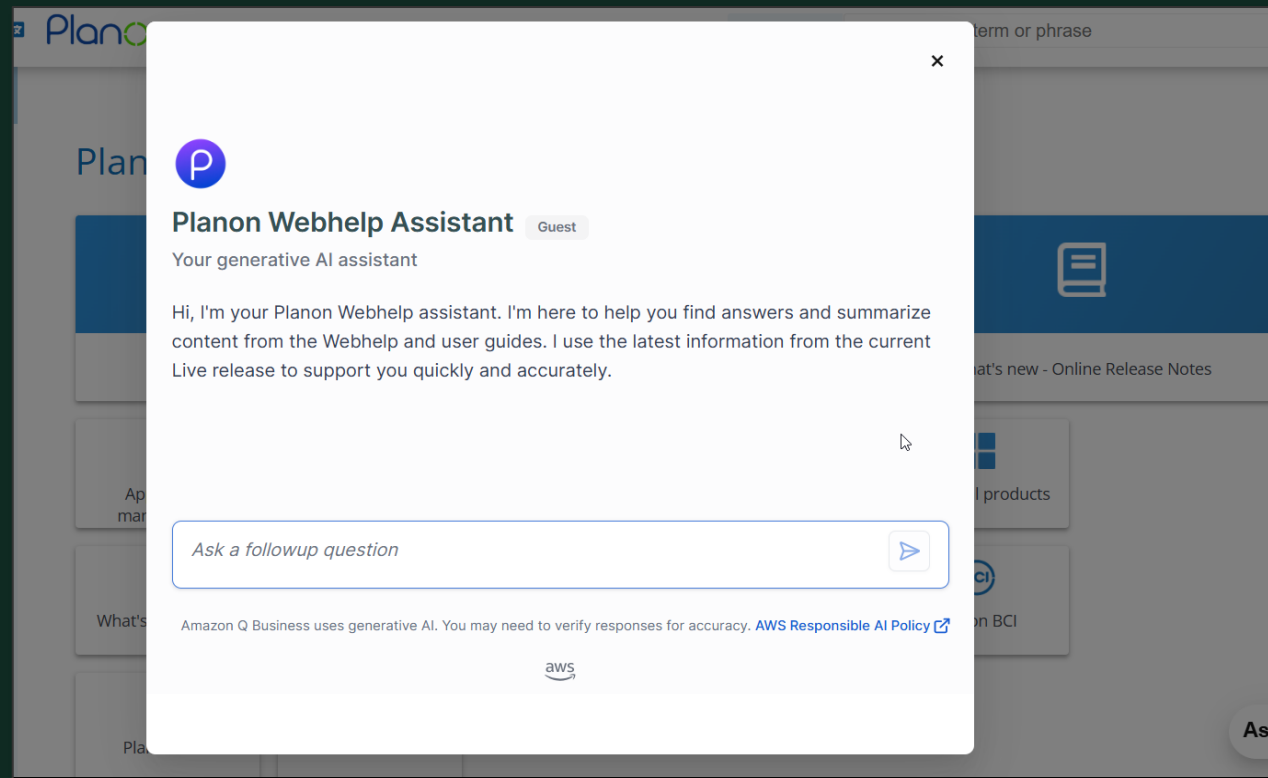


Easy Access to Information



WebHelp – Planon AI Assistant

A conversational AI assistant built into the WebHelp. Instead of browsing or searching through articles, you can now type questions and get instant answers.





Continue to Strengthen Partnerships and Digital Solutions

100 +

Standard Integrations with other solutions
via the Planon Marketplace

Including ESRI ArcGIS, Outlook, Wayfinding, Sensors and more

Highly strategic collaboration with
Schneider Electric & SAP

Marketplace collaboration with Microsoft &
Amazon

Planon is now available for purchase through these Marketplaces.

What's Driving Planon's Roadmap & Strategy?



Market Trends

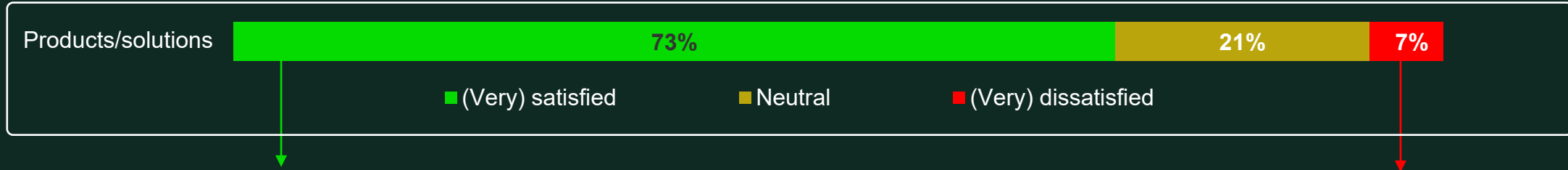
Which of the following real estate management objectives will be most important for your organization over the next three years?



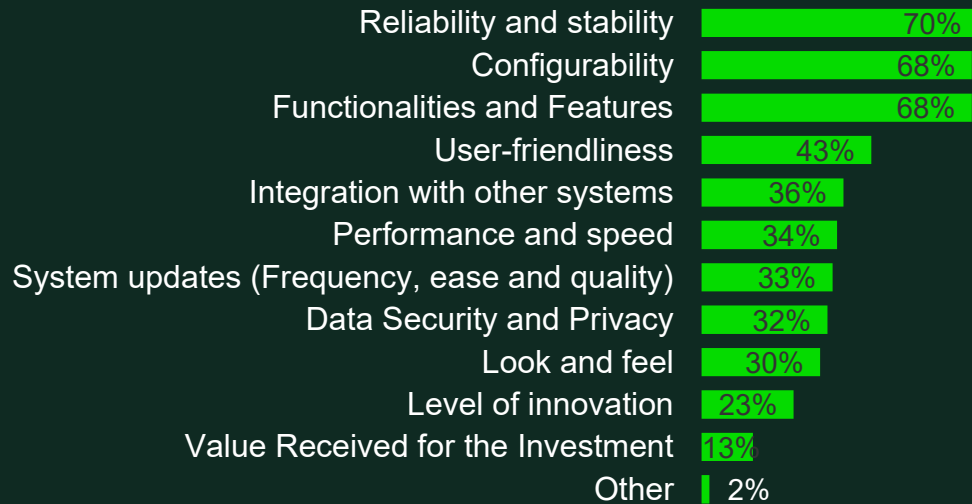
■ 1 (Highest priority) ■ 2 ■ 3 ■ 4 ■ 5 (Lowest priority)

Customer Survey 2025, a strong start

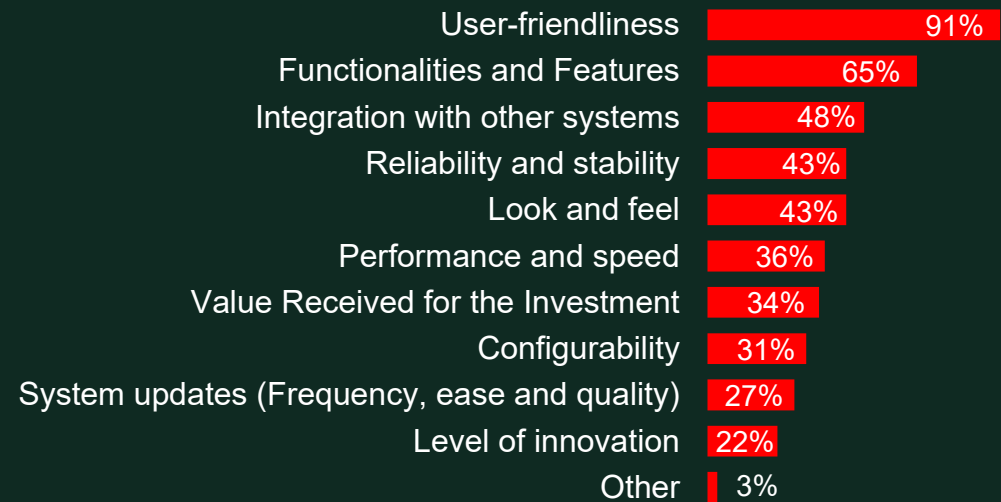
Almost three out of four customers are satisfied with the products/solutions. They value the reliability, configurability and the functionalities/features.



Reasons for satisfaction



Reasons for dissatisfaction



Base: All Planon customers (n=338); Excluding not applicable/ no answer

Base: Planon customers who are satisfied (n=125) and dissatisfied (n=28) with the products/solutions offered by Planon

Roadmap '26

Clear priorities, clearer outcomes, built to reduce friction and boost adoption










Planon Space & Workplace Services Management

Improved workplace experience, richer insights, smoother operations

Now (Q1)
~90-95%

Next (Q2)
~60-65%

Future (Q3, Q4)
~40-50%

	Now (Q1) ~90-95%	Next (Q2) ~60-65%	Future (Q3, Q4) ~40-50%
Space for HE	<ul style="list-style-type: none"> Indirect Cost Recovery and Planon Space Survey as public apps (released) 		
Strategic Space Planning	<ul style="list-style-type: none"> Unified Planboard & Floorplan Scenario Planning Experience (<i>beta</i>)  	<ul style="list-style-type: none"> Compare scenarios based on key metrics such as budget, or utilization targets Auto-convert approved scenarios into move workflows for a smooth rollout  	<ul style="list-style-type: none"> AI-powered planning to turn complex allocations into ready-to-use solutions  Long-term portfolio and workforce forecasting Breakdown demand and supply by user preferences such as space types.
MS Places	<ul style="list-style-type: none"> Ensure up-to-date MS Places information by manually syncing directly with your maintained Planon space structure 	<ul style="list-style-type: none"> Keep reservations and space info aligned with automated data sync  	<ul style="list-style-type: none"> Sync Planon floorplans and IoT insights data 
Workplace Insights & Kiosk	<ul style="list-style-type: none"> Make every room booking panel & kiosk unmistakably yours with custom logo branding 	<ul style="list-style-type: none"> Upgraded Workplace Insights interface with sharper visuals and easier filtering  	<ul style="list-style-type: none"> Portfolio-level insights in Planon Workplace Insights
Workplace App	<ul style="list-style-type: none"> Search conference room spaces by name Configure reservation info without needing to click into each individually  	<ul style="list-style-type: none"> Define default booking duration for desks Open the Planon app after scanning a Planon QR-code with the phone's native camera. 	<ul style="list-style-type: none"> View live in-app IoT insights such as temp. Support Neighborhoods

Confidential Property of Planon



Supporting AI initiative



Supporting UX initiative

Strategic Space Planning

Big-Picture Planning, Desk-Level Precision

Translate portfolio & department-level allocations into accurate, person-to-place assignments in one flow

The screenshot shows the 'Strategic space planning' interface. On the left, a 'Demand' view lists business units with their respective space requirements. On the right, a 'Supply' view shows available space for 'Columbus Square (14, *Columbus Square)'. A table below the supply view provides a summary of fixed and flexible space.

	Fixed Total/Free	Flex Total/Free
04	55 / 41	0 / 0
03	39 / 23	0 / 0
02	142 / 107	0 / 0
01	33 / 5	53 / 53
00	28 / 1	0 / 0

The screenshot shows the 'Strategic space planning' interface with a focus on '01, Space level department focus'. It displays a floor plan of 'Columbus Square' and a list of personnel assigned to the space.

Personnel	Code	Fullname	User planned
<input type="checkbox"/> User			
<input type="checkbox"/> 001	Mease, A Adrian	Yes	
<input type="checkbox"/> 002	Parking, A Adrian	Yes	
<input type="checkbox"/> 003	Curtis, A Agnes	No	
<input type="checkbox"/> 004	Cook, A Alice	No	



Strategic Space Planning

Your Future Portfolio Made Visible

Spot trends, gaps and impacts instantly within the multi-year planning grid

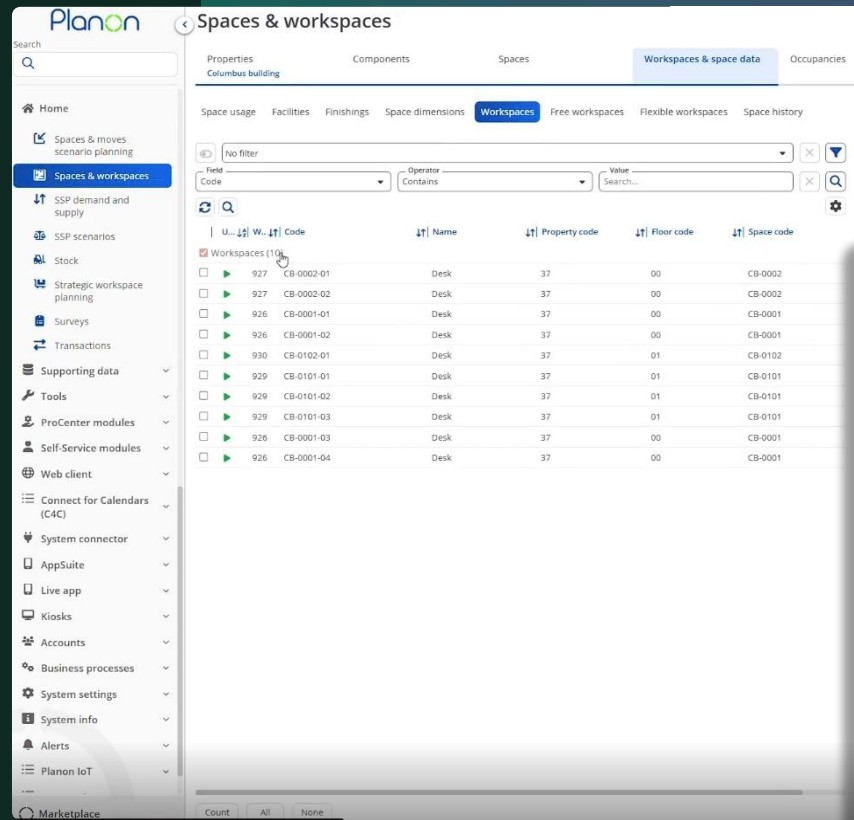
The screenshot displays the Planon Strategic Space Planning interface. The main view is a multi-year planning grid for the scenario '01, Space level department focus'. The grid shows data for units, properties, and departments from 2025 to 2030. The 'Quality Assurance' department row is highlighted in orange, indicating a trend or gap. Summary rows at the bottom show total headcount, total vacancy, and % utilization over the period.

Units	2025	2026	2027	2028	2029	2030
Properties						
Columbus Square	50	53	60	67	69	69
Airport Boulevard	50	57	55	63	65	71
Total capacity:	100	100	100	100	100	100
Departments						
Clinical Supply Chain	39	39	41	43	45	47
Global Logistics	7	7	7	8	8	9
Quality Assurance	21	21	22	23	24	26
Quality Control	1	1	1	1	1	1
Summary						
Total headcount	68	68	71	75	79	83
Total Vacancy	32	32	29	25	21	17
% Utilization	68%	68%	71%	75%	79%	83%

- Draw input from IWMS and further enrich planning input via employee surveys
- Supports planning at multiple levels: building, floor, space type or workspace type
- Spot trends, gaps, pressure points, and opportunities at a glance — from over-utilized buildings to floors you no longer need
- Simulate strategic moves like expansions, lease exits, or hybrid-work shifts to see their impact instantly, all in one view

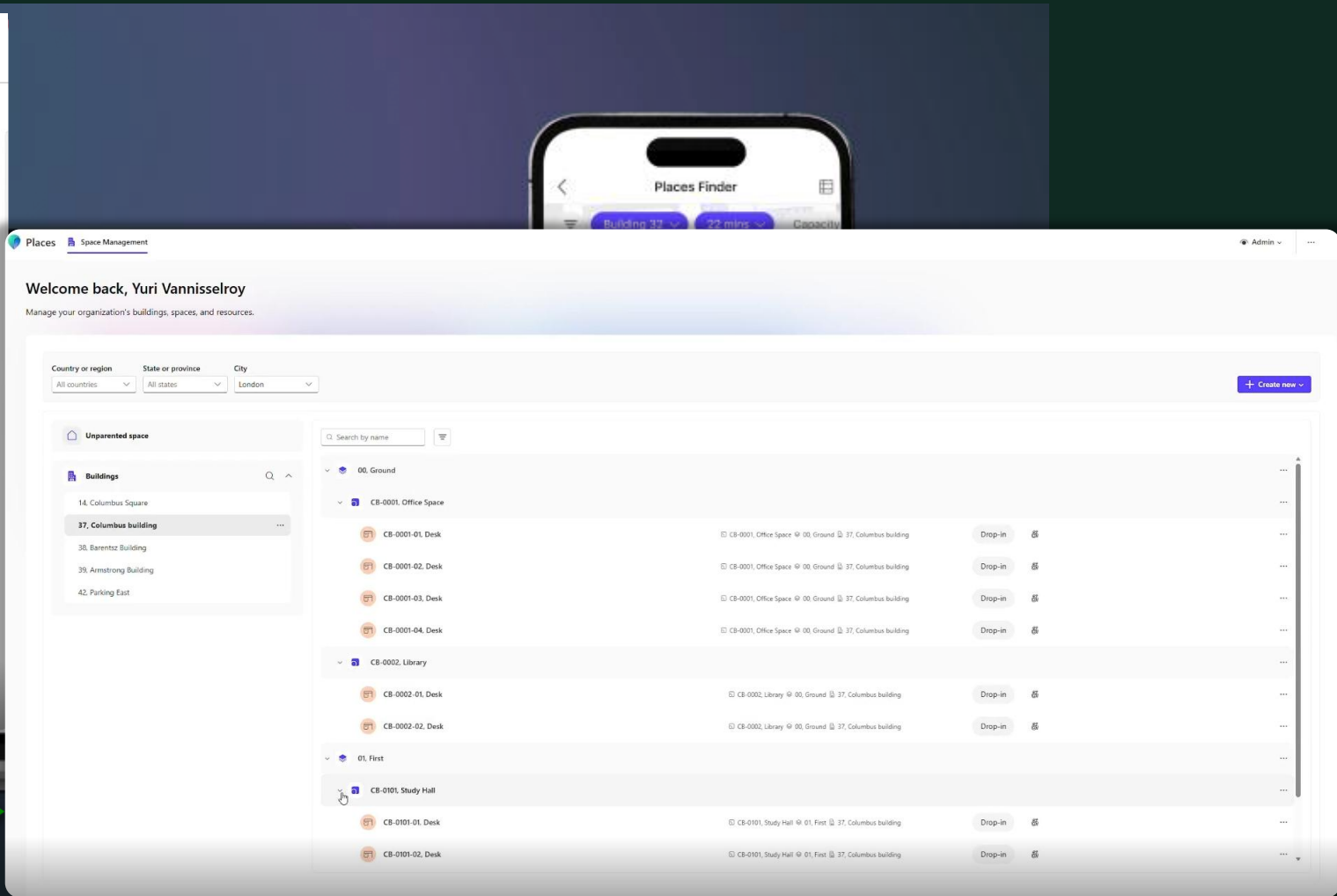
Microsoft Places integration

Expand partnership with Microsoft to deliver a greater workplace experience

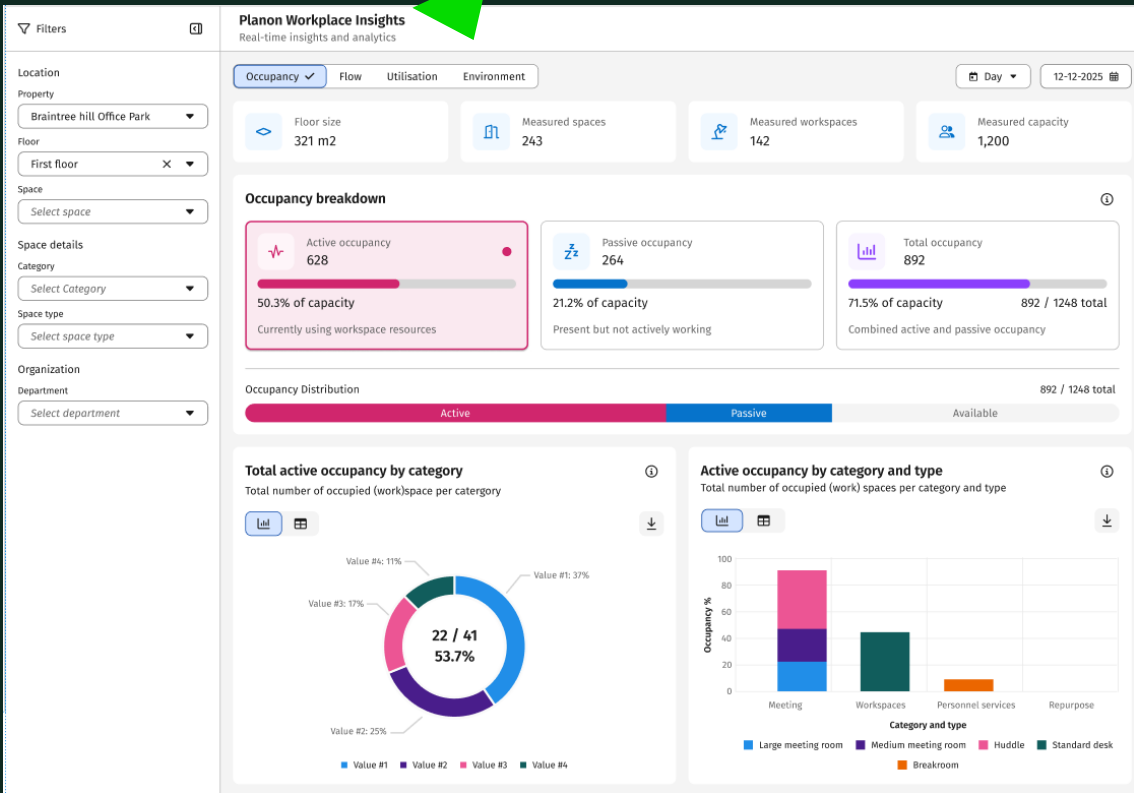
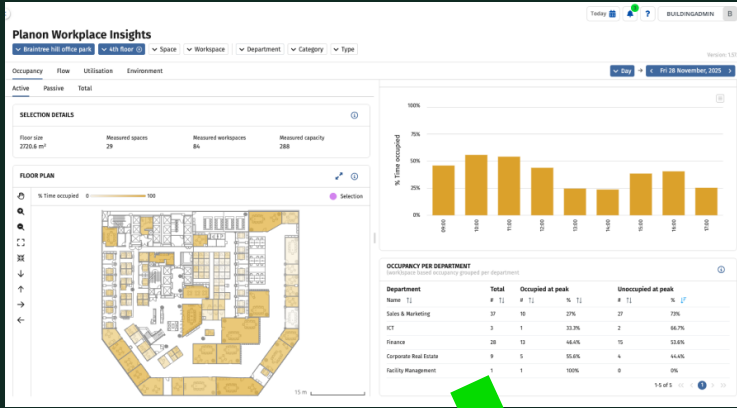


The screenshot shows the Planon 'Spaces & workspaces' interface. The left sidebar contains a navigation menu with options like 'Home', 'Spaces & moves scenario planning', 'Spaces & workspaces', 'SSP demand and supply', 'SSP scenarios', 'Stock', 'Strategic workspace planning', 'Surveys', 'Transactions', 'Supporting data', 'Tools', 'ProCenter modules', 'Self-Service modules', 'Web client', 'Connect for Calendars (C4C)', 'System connector', 'AppSuite', 'Live app', 'Kiosks', 'Accounts', 'Business processes', 'System settings', 'System info', 'Alerts', 'Planon IoT', and 'Marketplace'. The main content area is titled 'Spaces & workspaces' and shows a table of workspace data for the 'Columbus building'. The table has columns for 'Code', 'Name', 'Property code', 'Floor code', and 'Space code'. A search bar at the top allows filtering by field, operator, and value.

Code	Name	Property code	Floor code	Space code
927 CB-0002-01	Desk	37	00	CB-0002
927 CB-0002-02	Desk	37	00	CB-0002
926 CB-0001-01	Desk	37	00	CB-0001
926 CB-0001-02	Desk	37	00	CB-0001
930 CB-0102-01	Desk	37	01	CB-0102
929 CB-0101-01	Desk	37	01	CB-0101
929 CB-0101-02	Desk	37	01	CB-0101
929 CB-0101-03	Desk	37	01	CB-0101
926 CB-0001-03	Desk	37	00	CB-0001
926 CB-0001-04	Desk	37	00	CB-0001

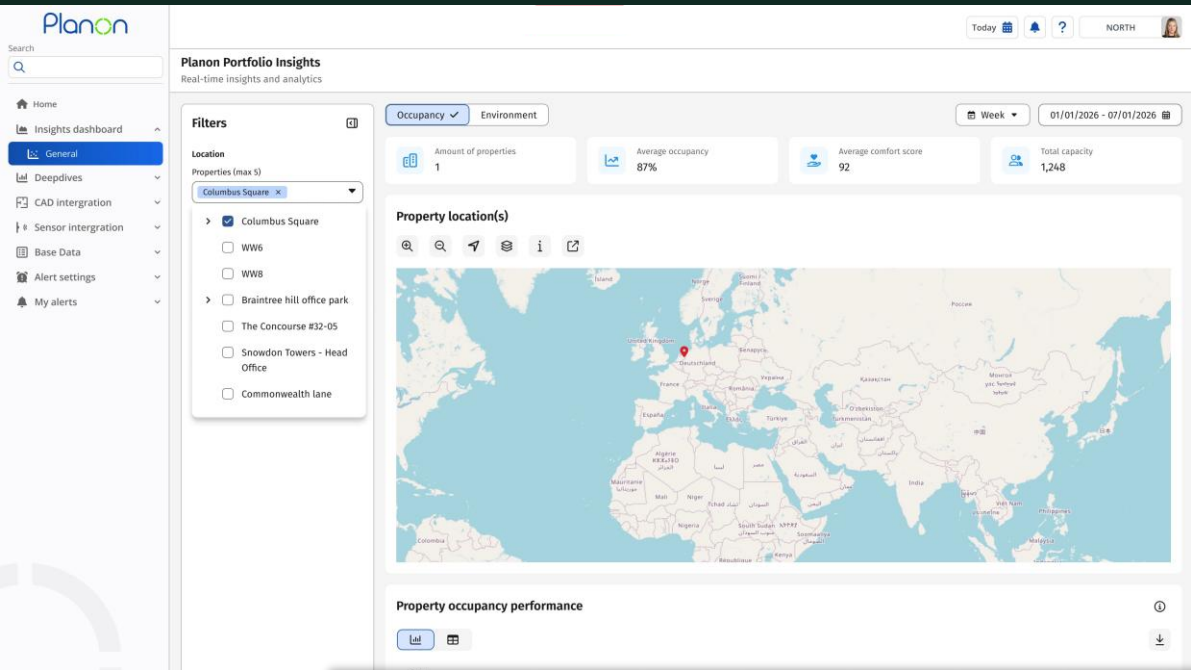


The screenshot shows the Microsoft Places 'Space Management' interface. It features a welcome message for 'Yuri Vannisselroy' and a navigation bar with 'Country or region', 'State or province', and 'City' dropdowns. The main content area displays a list of spaces under the heading 'Unparented space'. The list is organized into a tree structure with categories like '00. Ground', 'CB-0001. Office Space', 'CB-0002. Library', and '01. First'. Each space entry includes a name, a location path (e.g., 'CB-0001. Office Space @ 00. Ground @ 37. Columbus building'), and a 'Drop-in' button. A search bar at the top right allows searching by name.



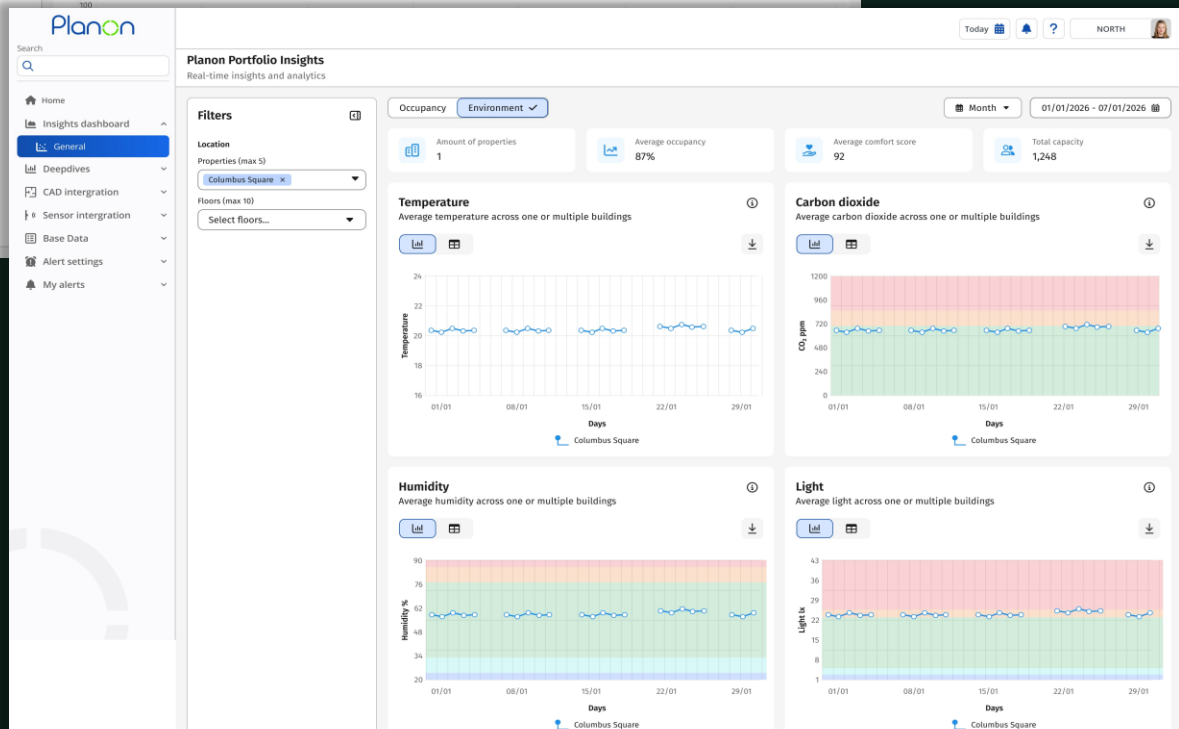
Simplified Workplace Insights

- Modernized, easy-to-use UI components
- See what matters instantly with richer visuals that clearly highlight trends, peaks and outliers
- New filtering: less clicks, more insights!



Improved Portfolio Insights

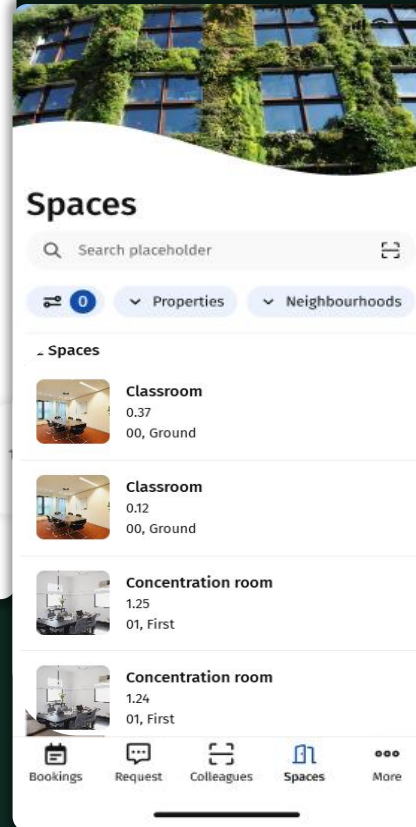
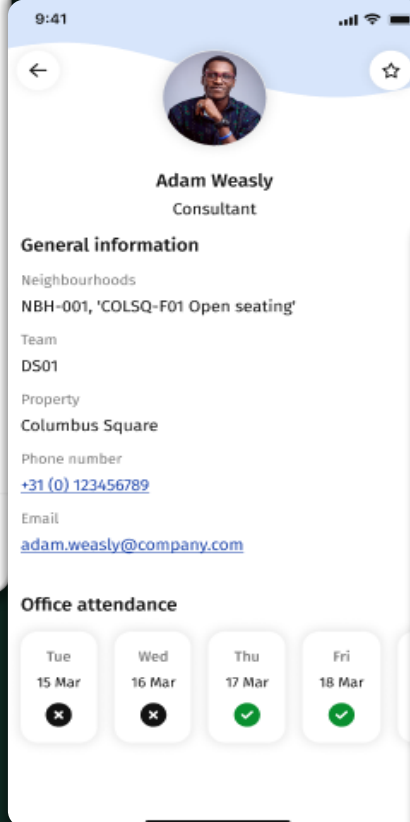
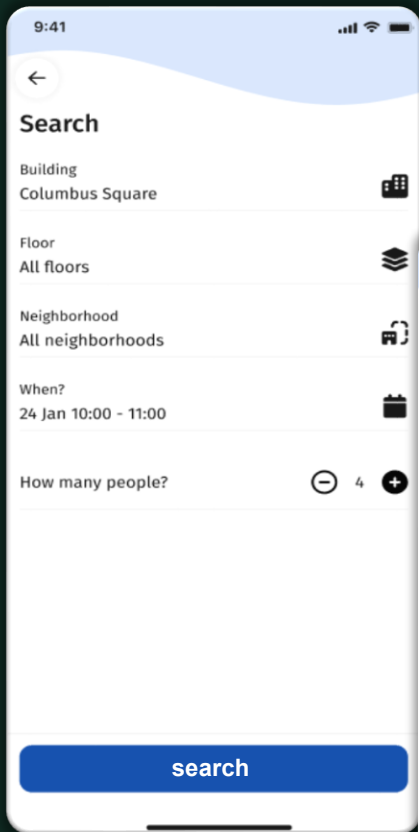
- From single-site insights to portfolio-level intelligence
- Empowering you to reveal hidden efficiencies, reduce operating costs and maximize portfolio performance





Neighborhoods in Workplace App

- Truly team-focused experience
- Fully integrated in search, filters and booking
- Supports finding the right zone and the right colleagues in seconds



Planon Asset & Maintenance Management



Now (Q1)
~90-95%

Next (Q2)
~60-65%

Future (Q3, Q4)
~40-50%

Asset & Maintenance Management

- Migration tool: Asset & Maintenance Management → Objective Based Maintenance
- Migration of Contract Maintenance Activity Definitions
- Graphical planboard improvements
- Questionnaire-driven assessments (Mobile Observations)
- Observations Mobile App improvements 

- Migration tool Asset & Maintenance Management → Objective Based Maintenance

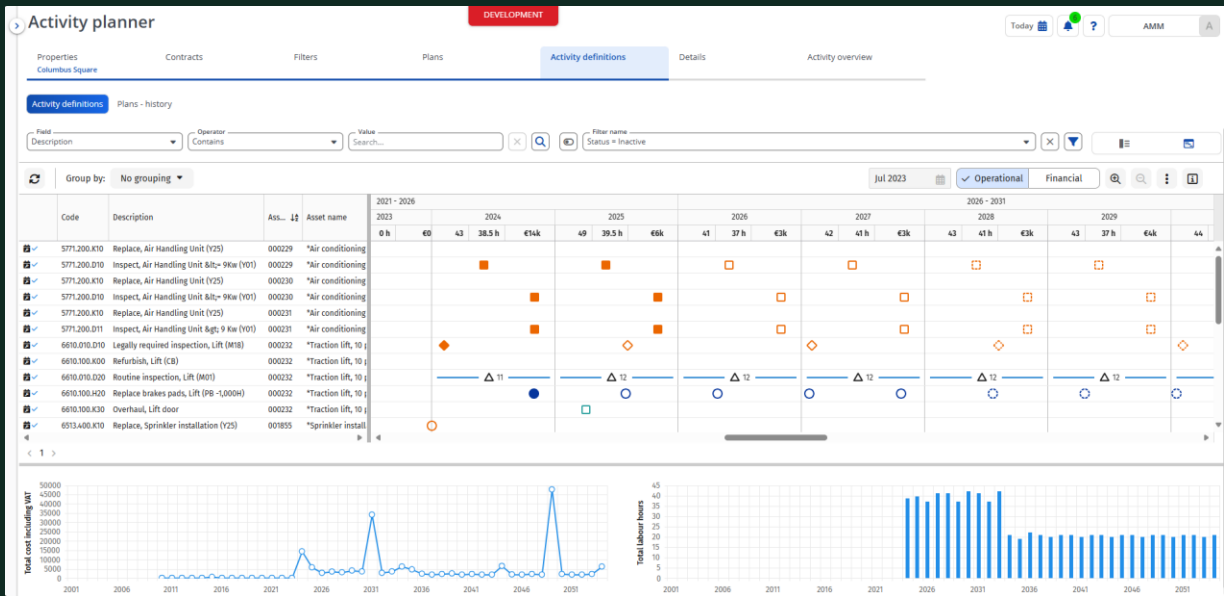
- Scenario planning (activity planner)

AI Based Resource Scheduling

- R&D (design, concept, requirements) 

- Implementation 

- Implementation 



Objective Based Maintenance Migration unlocks potential

More intuitive planning process and less manual

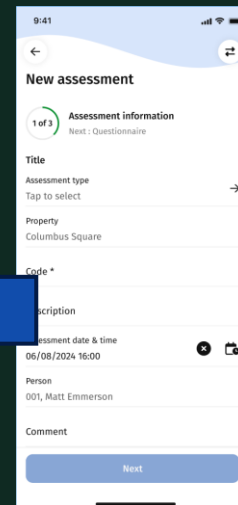
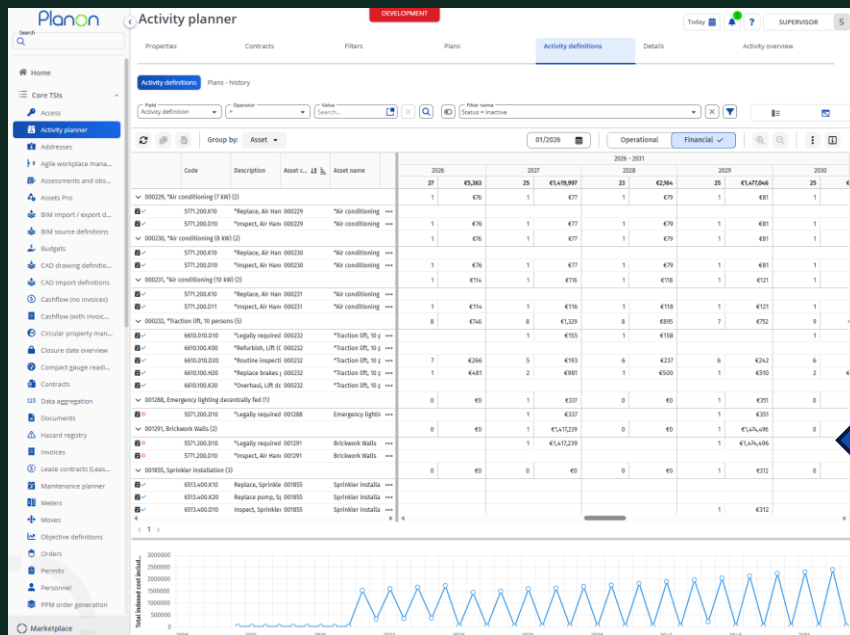
- Compiling plans is not necessary
- New planboard with a specific work & cost view
- Integrated with Planon Assessments & Observations solutions

Enhanced data handling for access and analysis

- Exporting capabilities for planning results
- Indexation option

Supporting growth, flexibility, and integration

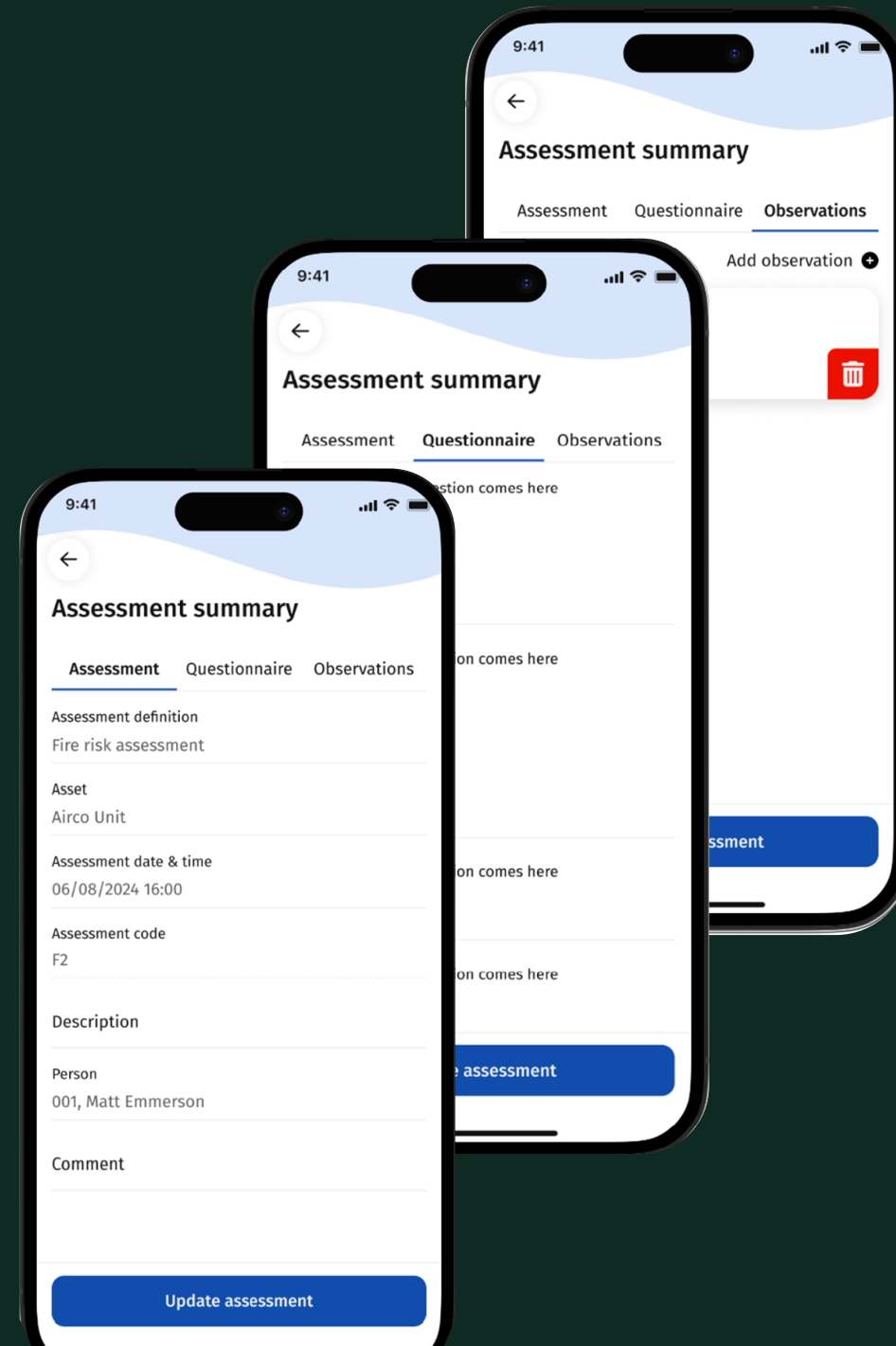
- Algorithms (workers) for custom business logic



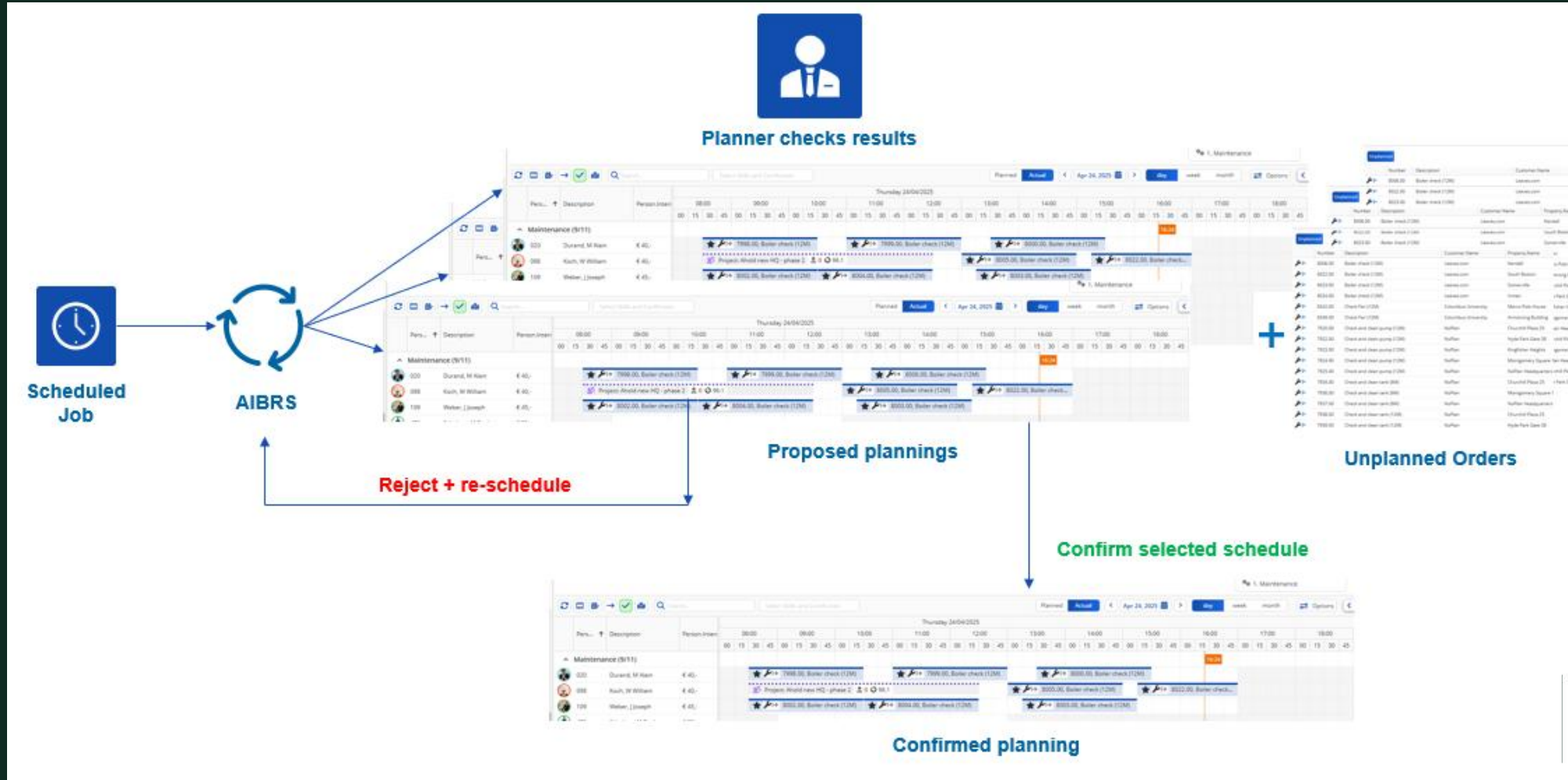
Planon Mobile Observation App

Mobile Observations

- Support questionnaire-driven Assessments
- Only display assets and spaces tied to the property being assessed



Boosting work force efficiency with AI based resource scheduling





Planon Mobile Field Services

Planon Mobile Field Services App

Now (Q1)
~90-95%

Increase usability of the app:



- Questionnaires from the requester are fully accessible (released)
- Jump to view assets offline in the Asset Manager App
- Register labor hours for team member
- Hide clustered PPM order activities that are completed 
- Remove team order if team member has an end date 

Improve data governance:

- Add threshold values on integer questions (Min/max values)
- Set max usage quantity on materials

Next (Q2)
~60-65%

Improvements on Health and Safety:

- Add smart icon for clear indication of Health & Safety related topics on the order 
- Smart workflow pages (hide empty pages) 

Investigate extending current limit on activities and check list items

Future (Q3, Q4)
~40-50%

Improving material handling in the app by:

- Including delivery address on non-product requisition lines
- Explore how to support requisition using external supplier & purchasing system

Closing labor hours on the end of the day for better invoicing

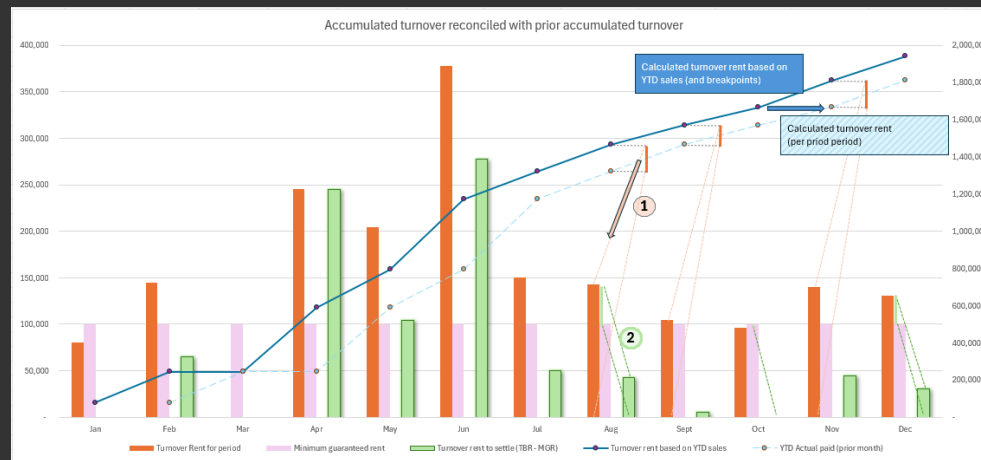
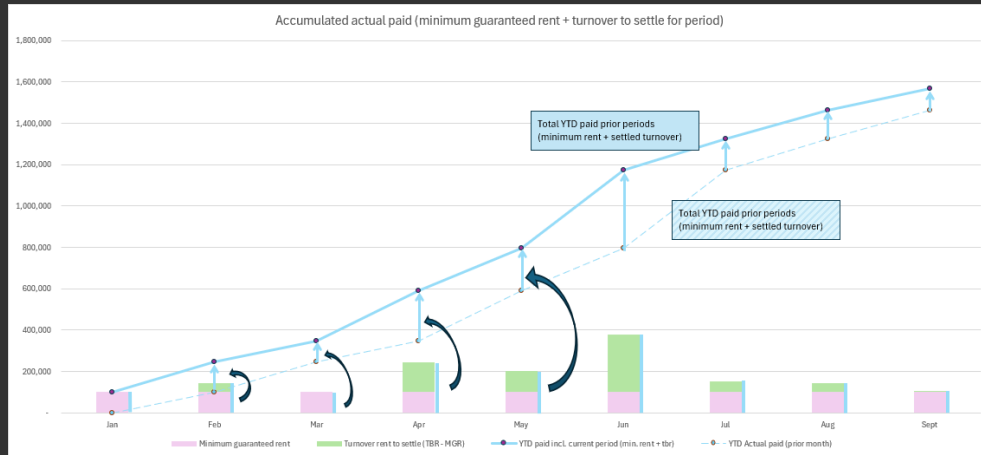


Planon Real Estate Management

Visibility and consistency across leases, assets, and value drivers



	Now (Q1) ~90-95%	Next (Q2) ~60-65%	Future (Q3, Q4) ~40-50%
Real Estate Management	<ul style="list-style-type: none">• Ongoing improvements (Maintenance & Support, Customer Ideas)• Improvements turnover based rent	<ul style="list-style-type: none">• Ongoing improvements (Maintenance & Support, Customer Ideas)• Improvements turnover based rent	<ul style="list-style-type: none">• Ongoing improvements (Maintenance & Support, Customer Ideas)



Turnover based rent more flexible

- Quick updates of turnover types requiring less overhead in turnover profile adjustments
- Deep copy of a turnover profile allowing for more elaborate turnover configuration changes with minimal efforts
- Onboarding of turnover configurations mid-settlement or mid-accumulation period allowing for easier migration of legacy systems, as well as combining lease accounting and turnover rent onboarding simultaneously.

Planon Energy & Sustainability Management

Energy Insights That Drive Sustainable Impact



Now (Q1)
~90-95%

Next (Q2)
~60-65%

Future (Q3, Q4)
~40-50%


Energy &
Sustainability
Management
(core)


Planon Building
Circularity
Insights


- Technical improvements for integration
- Deep-link for seamless switch between Planon Core Product and Planon ESM

- Customer centric improvements (Customer Ideas)
- Readings in Planon to be used in ESM.
- Users can use multi currencies for analytics

- Improved single sign on and administration
- Add. aggregation for more granular analysis
- Seamless switch between Planon and ESM

- Improved UX with scenario drill down 
- Environmental impact in activity planner

 Supporting AI initiative

 Supporting UX initiative



Planon AI Roadmap (strategic development)



Service Request Ticketing Integrate with external AI assistants to streamline service request creation and improve issue categorization for faster, more accurate support.



Lease and Service contracts abstraction

Upload a contract once and let Planon automatically create all required records and data— with future support for invoices, certificates, assets, and suppliers.



Reservation request

For end users: able to book meeting rooms, desks, assets



AI based resource scheduler

Support smarter scheduling with alternative options based on different settings and automatic rescheduling when needed.



AI restack and scenario planning for Space & Workplace

Automate scenario generation aligns space and workplace supply with demand.



Flow by Design

A faster, clearer UI/UX shaped by real customer journeys



Designing a Simpler, Faster Planon Experience

Because every click should move you forward, not slow you down.

Your feedback is clear:

- “Too many clicks to get simple things done.”
- “Navigation feels heavy; hard to find what I need.”
- “End-users struggle, they need clarity, not complexity.”
- “The interface should guide me, not confuse me.”

Our UX/UI Improvement Process and 5 UX principles

What this means for you



Our UX/UI Improvement Process

- **Listen:** We collect real user input through surveys, customer safaris, interviews, support tickets, CSM insights, and presales observations.
- **Understand:** We map pain points such as confusing navigation, too many clicks, and inefficient workflows.
- **Design:** UX and product teams create prototypes based on our core principles, simplicity, clarity, and fewer clicks.
- **Validate:** We test designs with customers to ensure they solve real problems before we build.
- **Deliver:** We release continuous improvements, quick wins first (e.g., autosuggest, clearer field feedback, completed-job filtering), while shaping larger changes.



Core 5 UX Principles

- **Simplicity:** Cut unnecessary steps. Reduce friction; *Every workflow should feel obvious.*
- **Clarity:** leaner screens, clearer actions, predictable behavior; *If users have to think too hard, we redesign.*
- **Efficiency (Less Clicks):** Minimize effort for frequent actions; *The fastest path becomes the default path.*
- **Consistency:** One design language across web, mobile, Kiosk, Insights, and Workplace App; *Learn it once, use it everywhere.*
- **Accessibility:** Ensure readability, contrast, keyboard navigation, and inclusive interactions; *Good UX works for everyone.*



What this means for you

- **We listen** to real user feedback, understand where friction occurs, and design simpler, clearer, fewer-click experiences based on core UX principles.
- **We validate** these designs with customers before building to ensure they solve the right problems.
- **We deliver** continuous improvements, quick wins now and bigger enhancements over time, resulting in a faster, more intuitive, more consistent user experience.

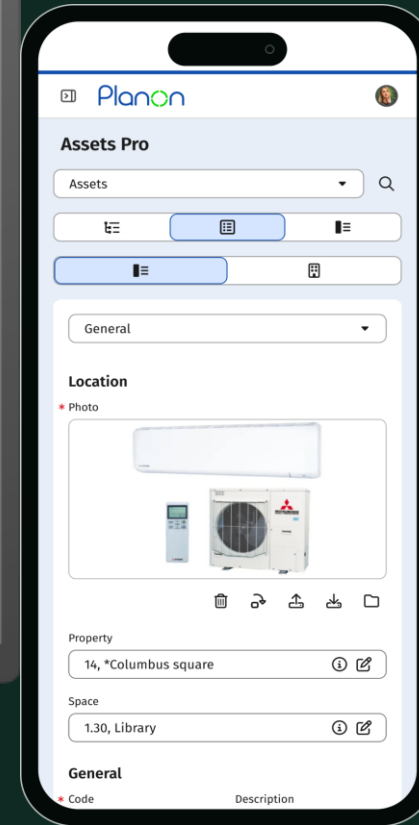
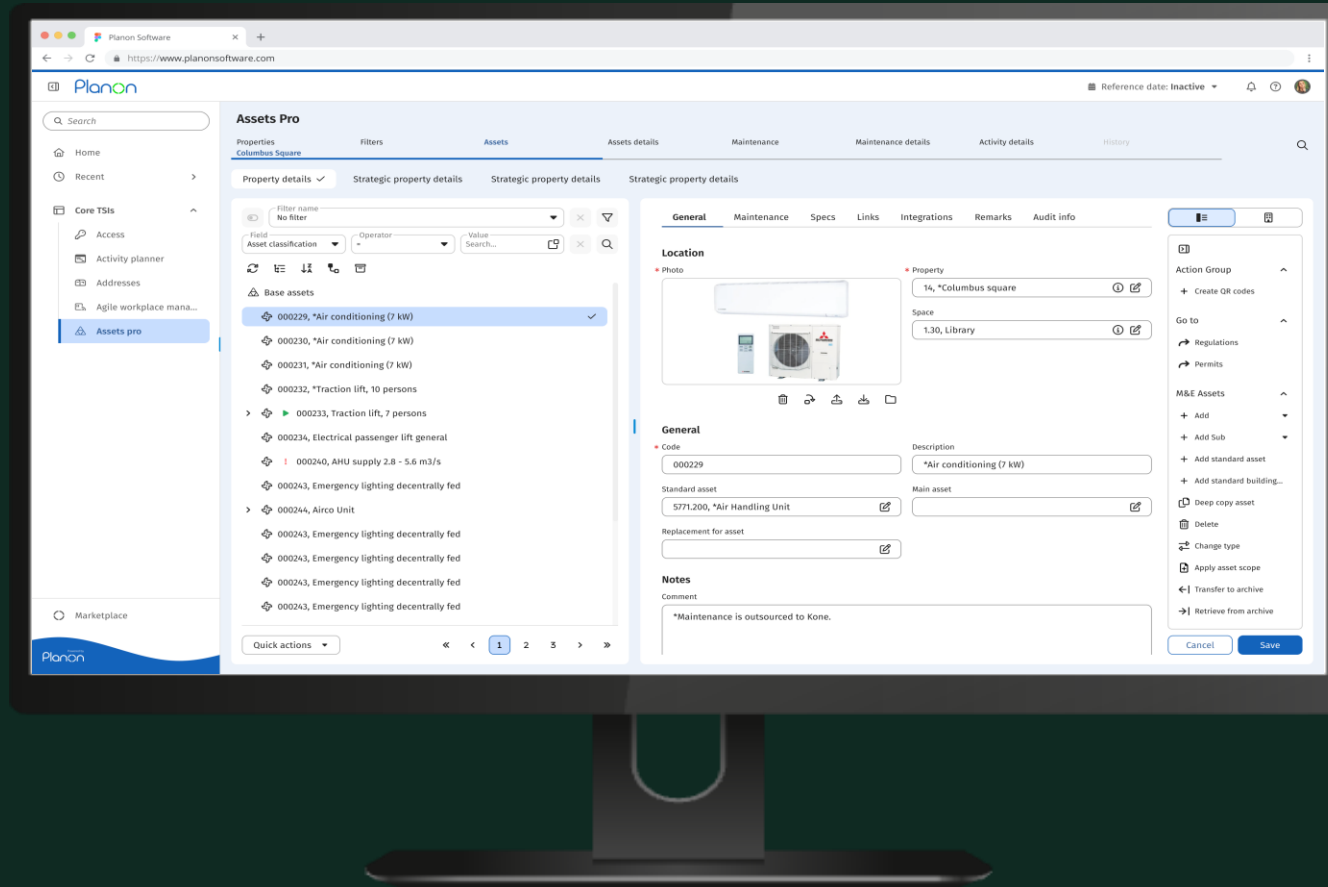
UI / UX Improvements

Already underway and more to come

- New modern front-end technology stack
- Improved hyperloops within the platform for improved user navigation
- Improved standard form/layout usability (screen real estate)
- Improved notification handling

Planon Framework UI Modernization

A refresh, not a rebuild: Updated look & feel



Concepts

The screenshot shows the Planon Work Overview dashboard. At the top, there are summary cards for record counts: 12 Total records, 3 Active, 3 In Progress, and 3 Pending. A dropdown menu is open, listing actions like 'New high prio observations', 'New activity definitions', 'Response to cost approval received', 'Orders on hold', 'Hazard(s) awaiting assessment', 'Customer escalations pending', and 'Manage Alarms'. Below the menu is a table of records.

ID	Name	Status	Priority	Assignee	Location	Due Date	Progress	
AWM-001	Desk booking system upgrade	In Progress	High	SC Sarah Chen	HC	12 Apr 2026	65%	
AWM-002	Meeting room AV equipment replacement	Pending	Medium	JP James Park	HC	12 Apr 2026	0%	
AWM-003	Flexible workspace zone configuration	Active	High	MT Maria Torres	West Wing	Space Planning	20 Apr 2026	30%
AWM-004	Occupancy sensor installation - Level 1	Completed	Low	TW Tom Williams	HQ - Floor 1	IoT / Sensors	20 Feb 2026	100%
AWM-005	Hybrid work policy update	Active	Medium	SC Sarah Chen	All Sites	Policy	31 Mar 2026	45%
AWM-006	Locker system modernisation	On Hold	Low	ED Emma Davis	South Campus	Infrastructure	15 May 2026	10%
AWM-007	Collaboration hub fit-out - Block C	In Progress	High	JP James Park	Block C	Space Planning	10 Apr 2026	55%
AWM-008	Air quality monitoring rollout	Pending	Medium	MT Maria Torres	All Sites	IoT / Sensors	20 Apr 2026	0%
AWM-009	Ergonomic workstation audit	Completed	Medium	TW Tom Williams	HQ - All Floors	Health & Safety	28 Feb 2026	100%

The screenshot shows the Planon record details page for 'Air quality monitoring rollout'. The record is in a 'Pending' status with a 'Medium' priority. The page includes a 'General Information' section with fields for Description, Status, Assignee, Location, and Due Date. Below this is a 'Line Items' table with columns for Description, Qty, Unit, Unit Cost, Total, and Status. The right sidebar contains sections for Record Details, Recent Activity, Open Tasks, and Related Areas.

DESCRIPTION	QTY	UNIT	UNIT COST	TOTAL	STATUS
Hardware procurement - workstations	12	ea	£1,400	£16,800	Approved
Network cabling & patching	1	job	£3,200	£3,200	In Review
Software licences (annual)	12	seat	£180	£2,160	Approved
Installation & configuration	3	day	£850	£2,550	Pending
User training sessions	2	session	£600	£1,200	Pending



Q&A

Jay.shah@planonsoftware.com

Thank you