

7 Ways to Optimize Project Team Productivity:

Using customizable Web-based software to your business advantage

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The [Excel] system worked well for the first couple of years of business, but it soon became very difficult – too time-consuming and laborious.

*Daniel Pries, founder and principal,
ProPoint Graphics*

INTRODUCTION

No matter what role you have within an organization – be it engineer, salesperson, consultant, marketer, or business owner – you’ve acquired a second responsibility: project manager. But managing projects has become more challenging than ever.

Why? The work environment has expanded across departments, across job roles – and even across continents. To achieve organizational objectives, cross-functional teams form, collaborate, dissolve and re-form to tackle precisely defined projects and fulfill specific deliverables within carefully controlled deadlines and budget demands.

In other words, we don’t work in “departments” as much as we work on projects. And projects mean lots of people sharing loads of information across offices and time zones. It means, frankly, that there’s a great demand for effective, efficient project management.

Whether you’re constructing a new building or collaborating on a lead generation program, a great deal of success depends on the software tools that facilitate project collaboration, applications that help teams achieve their goals.

That’s what this paper is all about. To be genuinely helpful, the right project management tool shouldn’t become a project unto itself. Instead, the best tool allows you and your colleagues to focus on what you do best – your work.

In the following pages, you’ll discover seven ways that you can optimize project team productivity with customizable, Web-based project management applications. By taking advantage of easy-to-learn, easy-to-use software that’s expressly designed for effective project collaboration and communication, your teams can stop swapping spreadsheet files and exchanging emails, and at the same time, reduce their dependency on IT application support and increase their ability to work – and succeed – together.

1. Eliminate the “spreadsheet shuffle”

There’s an old saying: “When your only tool is a hammer, everything looks like a nail.” For many companies, the spreadsheet is the hammer they apply to any project. And just as a hammer is a poor way to measure dimensions or cut wood, the spreadsheet – though familiar – introduces more project management problems than it solves.

When you and your colleagues do the “spreadsheet shuffle,” your team choreography descends into chaos. Without a centralized project work space that easily integrates individual efforts into standard versions of information, your project is exposed to conflicting documentation. Using spreadsheets means wasting time reconciling multiple document versions. Lack of adequate tracking and audit tools makes it nearly impossible to find errors. Worse, spreadsheet programs haven’t been designed to encourage communication: they have no features for tracking progress, prompting activity or alerting team members to deadlines.

Emailing spreadsheets is a project work-around, not an effective means for managing work. The alternative? A project management application that centralizes project information, provides all team members with secure access to the information they need—whenever and wherever they need it—streamlines data gathering, tracking and communication, and makes it easy to stay on the same page and easy to monitor progress.

A recent study by TripleTree and the Software and Information Industry Association found that on-demand deployments are 50 to 90 percent faster, with a total cost of ownership five to ten times less than for installed software.

“Software as a Service: Changing the Paradigm in the Software Industry”

SIIA and TripleTree Industry Analysis Series

2. Seek the packaged vs. custom software sweet spot

When seeking a project management tool, professionals and business owners have often been caught between two options: off-the-shelf, packaged project management applications or custom solutions built in-house or with outsourced developers.

Each has its pros and cons. Packaged applications offer the convenience of out-of-the-box features and rapid deployment. But they impose their rules on users, have limited features and cannot be tailored to meet the unique needs of different companies, or even different teams within the same company.

Custom software will certainly work for your teams. But it’s expensive and it can be time-consuming to develop, implement and support. Modifying the software to meet changing functionality needs is neither easy nor fast – every application change introduces a new round of development, testing and installation.

There is a way to get the convenience you need with the flexibility you want. Instead of buying packaged software or developing a custom solution, consider customizable “software as a service” (SaaS) solutions. SaaS solutions are Web-based applications delivered as a service, hosted by a third-party vendor on a secure server and easily accessed via a browser. SaaS project management offers a productivity “sweet spot” that gives you:

Cost-efficiency

SaaS solutions require no additional hardware or software and are often priced per user. With the per-user pricing model, you only pay for the number of users you need as you need them. As you add and remove users, your monthly subscription fee adjusts accordingly; with desktop software each license becomes a sunk cost that requires an additional investment. Some SaaS vendors provide an unlimited application model in which you pay per-user and have access to as many applications as you like, rather than paying a user fee for each application.

Flexibility

With customizable SaaS solutions, you can control: what information is gathered and tracked; how information is displayed; who can see what information; what information is communicated when and to whom; and what analyses and calculations are performed on data.

This flexibility allows you to work the way that’s best for you and your team – instead of conforming to processes dictated by the software. And it’s easy to modify the application as your business evolves. But the key word here is “customizable” – not all SaaS solutions allow this flexibility.

Scalability

SaaS solutions are much friendlier to a company’s growth model than packaged or custom-built solutions. The best SaaS solutions allow you to add or remove users quickly and easily as your needs change. This scalability allows companies to start small and grow their application use over time and is especially helpful for quickly adding users in a new location.

The computerized spreadsheet was invented 30 years ago, and it just hasn't kept up with the demands of today's business user. In the Anywhere Enterprise, where work groups are seldom in the same location, the need for up-to-the-minute status updates and better communication all beg for a more technologically advanced solution.

Josh Holbrook, director of enterprise research, The Yankee Group

3. Leverage the advantages of hosted Web-based applications

Take advantage of the unique qualities of a hosted online solution that gives team members access to the information they need, wherever and whenever they need it. A hosted solution helps your company:

Overcome geographic obstacles

Whether team members are in Paris or Peoria, they can collaborate on projects. Staff, vendors, partners and customers can work together regardless of location.

Remove time boundaries

The Internet is up and ready 24/7 – so participants can work on projects regardless of the time of day or time zone.

Web-based solutions also offer advantages that minimize administration and maximize security, allowing you to:

Reduce installation, maintenance and even training hassles

By eliminating the need to install and run the application on your own computer, SaaS removes the burden of software maintenance, ongoing operation and support. The only software that team members need on their computers is one they already have and know how to use – a Web browser. If you choose a customizable SaaS solution, you can adjust the application to match your existing project management process, drastically minimizing the need for application training. Customizable software accommodates the way you and your team work, not vice versa, making adoption much easier.

Reduce security threats

USB drives, email attachments and laptops are prone to data loss, theft and other security leaks. Using a hosted Web-based application means your team doesn't have to store or email information. Instead, it's all stored in a secure data center managed by your SaaS vendor.

4. Maximize productivity while minimizing IT dependence

A desktop or custom project management solution requires IT assistance for installation, maintenance and support from both a time and hardware perspective. When you turn to your IT department (assuming you enjoy the privilege of having one) to provide you with a project management tool, you add a burden to its schedule, delays to your implementation and an additional expense to your project.

Customizable SaaS solutions deliver the functionality you need without incurring new costs – in time and money – for installing software, adding new features or for maintenance and support. For maximum efficiency and productivity, your project management application should provide:

Convenience: With the right application, your team can access project information over the Web, whenever and wherever they want. They can create and modify reports on the fly without IT or developer assistance. And they can update their own task status, fast.

Customization: Team members can easily change row and column names, create real-time reports, personalize their application dashboard to see just the project information they need, and more – all on the fly.

I estimate that well over 50 hours of work per month are saved in our staff meetings, plus an additional savings of four hours per month in walking around “sneakernet” time!

Ed Metz, vice president and director of technical services, Robert Berning Productions, Inc.

Speed: You should be able to collaborate right away, without installation or custom development delays or extensive training.

Scalability: Teams are fluid groups of individuals that form, dissolve and re-form over time. Managing secure access and assigning varying levels of permission for each user should be simple enough for the application administrator to do without IT assistance. And adding users to the application should be as simple as sending an email.

Updates: Every off-the-shelf software upgrade requires installation on each user’s machine – a time-consuming process. One of the major advantages of SaaS solutions is that upgrades are made automatically without imposing any work on you or your IT team.

5. Automate recurring processes

The whole point of project management is to make more effective use of everyone’s time. Every hour of busywork you eliminate through automation is an hour liberated for more productive and more profitable use by team members.

Automating recurring processes reduces or even eliminates administrative work while providing more timely and in-depth communication. Customizable, Web-based software can help you:

Manage reports: You can automatically distribute reports on a pre-arranged schedule (daily, weekly, monthly, etc.). Recipients can then interact directly with the real-time information in the report by making on-the-fly changes to the report and sorting information by category, dates, resources and more. Empowering users to create and modify reports saves you the time of creating one-off reports for various team members.

Communicate progress: As work proceeds on the project, the application can be set up to automatically distribute status alerts that notify team members when new projects or tasks are assigned to them and update them when information changes – for example, when work is completed or delayed.

Prompt action: Your project management application can send reminders to notify team members in advance of task due dates to ensure that key dates are met.

6. Personalize the project experience

Sure, collaborative teamwork is what project management is all about. But your team’s success depends on the integration of individual efforts, each with different needs. From the organization’s point of view, there’s a need to assign varying levels of information access to project participants. From your team’s point of view, there’s a need to customize the application to view the information that’s most important to them.

Many project teams find the following personalization features very helpful:

Adjustable permission levels

The entire team does not need equal access to project information. Customizable project management applications allow managers to control what information individuals can see – and their ability to modify, share or simply view it – by assigning different levels of permission.

This way, the company retains the oversight it wants, while individual participants gain access to just the information they need – no more, no less. Confidential or sensitive information remains restricted to authorized users.

Customizable dashboards and reports

A “dashboard” is an application’s control center. It’s the first page you see when you open your application, and it puts all the at-a-glance information you need in one place. From it, you can search, add information, create or access reports, and more. Project management software should enable individuals to arrange their dashboard to their tastes, allowing them to easily access just the documents, records and other information most important to them. It should also enable individuals to create their own custom reports so they can see information how and when they need it.

7. Anticipate needs for security, service and support

While the benefits of a hosted, Web-based project management solution are attractive, many businesses hesitate as they ask, “Is it safe?”

Many SaaS providers have made extensive hardware and software investments that offer an exceptional level of security. That said, not all providers are alike. When you’re evaluating a potential solution for your project management needs, consider the following:

Data security: Where is the data hosted? What systems are in place to protect your data? Look for a solution that provides the utmost protection for your business information.

Service and support: What happens when you need help? Who’s available to get you started – and to assist your team as needs arise? Look for service and support policies that can bring rapid relief to your occasional challenges.

Years of experience: Is the provider a new player or a proven partner? Who are its clients and what are their satisfaction rates? Previous history is one of the best predictors of future experience.

Finding the right match to your needs

Ultimately, the best project management solution is the one that lets you work the way you want, so you and your team members can be more productive and efficient. Use the following checklist to identify the issues that matter most to you, your colleagues and your organization.

“I need a project management solution that can...”

- Reduce our dependence on spreadsheets and emails
- Provide team members with access to the same information in one central location
- Allow customization of forms, row and field names, reports, permission levels and more – all without writing code
- Scale up and down to easily accommodate new users and team changes
- Provide 24/7 access to project information for team members anywhere in the world
- Be implemented without putting additional burden on IT or requiring additional IT infrastructure
- Incorporate upgrades automatically
- Distribute reports, alerts and reminders, automatically
- Assign different levels of access to different team members
- Give users the ability to customize their application dashboard
- Provide world-class security
- Offer reliable service and support resources
- Demonstrate a track record of real-world success

About Intuit QuickBase

Intuit QuickBase, from the makers of TurboTax and QuickBooks, is a new approach to business software. Instead of buying or developing individual software applications, you customize or create QuickBase applications to meet your specific needs. QuickBase can be used for some or all of your information-driven software needs, such as managing projects, sales contacts, providing customer support and tracking inventory. QuickBase applications improve productivity and efficiency because they are tailored by the user to match the exact process, terminology and unique needs of the team – something complex software or generic spreadsheets simply can't match. Used by thousands of small businesses and over 50 of the Fortune 100, QuickBase applications give you and your team access to information over the Web, whenever and wherever you want. Learn more at <http://quickbase.intuit.com>.