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Bringing to market a Cloud Based SaaS Project Management and Portfolio Management Solution, Project Insight is allowing Project Teams to Collaborate from Any Location in Real-Time

**Business Services
Project Management Software**

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**Cynthia West, Ph.D.
Vice President**

BIO:
Cynthia is a sales and marketing professional with over 20 years of sales and marketing experience in the information technology industry. As a 'serial entrepreneur,' she specializes in taking new divisions and start-ups from zero to $20 million in sales, developing the sales process and structure for new entities, determining the marketing emphasis and then executing the plan.

Cynthia has been with Metafuse, the providers of Project Insight, for ten years. She worked in Silicon Valley for 10 years. There she was involved with 3 start-ups, one which was acquired by R.R. Donnelley & Sons, another which was an early stage MP3 player that went public, and the last which was backed by Ernst & Young.

About Project Insight:
Project Insight project management software is cloud-based project and portfolio management software for the mid-market. The software brings project managers, team members and executive management together to collaborate on projects in real-time, whether across the globe or street. Project Insight is powerful for experienced project managers, yet easy to learn and adopt, helping organizations operate more efficiently and productively. This combined with responsive customer service is what makes Project Insight the best provider of online project management software in the mid-market.

**Interview conducted by:
Lynn Fosse, Senior Editor
CEOCFO Magazine**

CEOCFO: Ms. West, would you tell us about Project Insight?
Ms. West: Project Insight is a cloud based project management and portfolio management solution that allows project teams to collaborate on their projects and tasks from any location.

CEOCFO: What is it about your solution that distinguishes Project Insight?
Ms. West: First of all, Project Insight is a mid-market project and portfolio management solution. We view the market as having three tiers, high-end systems, low end tools and the mid-market solutions. The high-end solutions are six figures and up and require a mature project team to implement them. Then there are low-end tools which are better doing one or two functions like Drop Box where you share files, or Basecamp which manages tasks. Project Insight is a mid-market solution. We tend to appeal to teams that have some experienced project managers on the team, but the rest of the team just wants something easy to use. It is a blend of having robust features that satisfy those project managers, while keeping it easy enough for the rest of the team to learn and adopt rapidly. That combined with a value-based price is generally what draws people to our software as opposed to others.

CEOCFO: What are some of the more common features that you are able to provide? And what are one or two things that people would be surprised your software cover?
Ms. West: One of the functions that is very popular among our customer base is the resource management, and specifically the resource balancing and forecasting. Even though the economy is challenging these days, our customers tend to be in growth mode. This means they are trying to manage more projects than they have resources to perform these projects, or they are trying to run those projects more profitably. Project Insight allows teams to take a look at what all of their team members are working on across all projects. That is a very key feature set for our customers. A couple things related to resource management are: resource allotment and project prioritization with the scorecard. Project Insight's resource allotment feature allows a team to figure out how much time each resource should work on a particular project

across a handful of months, and manage that at a higher level than at the task level. That is something that is not a common feature in other mid-market project management solutions. Another feature that helps with project prioritization is the scorecard. The scorecard allows the team to prioritize their projects based on organizational goals. Then they can view that scorecard number alongside their resource allocation report, allowing them to decide which projects they should embark on first, helping them put projects in the right order. Aside from the specific functions, our developers have spent a lot of time making the software very useable. Usability is the key to the success of a software implementation. Our software has lots of shortcuts like allowing users to access favorite pages within one click, or to get more room on the screen by collapsing different areas and expanding other areas.

CEOCFO: How do you reach potential clients?

Ms. West: Like many companies these days, we utilize a lot of online advertising to drive potential clients to our website. Once on the website, they fill out the web form and that passes to our team in real-time. It's an inbound marketing model.

CEOCFO: Within the middle market range, are there particular industries of focus for you or that you would achieve greater penetration?

Ms. West: While some software packages are focused on specific vertical industries, we are focused on project processes. Our sweet spots are IT, product development, professional services and interactive agencies. For example, we work with the IT team at The Gap and at Cisco, which are in two very different industries, but they are both running IT project processes.

CEOCFO: Your website shows that the ease of use seems to be a big factor, with many testimonials. Did you realize early on how important that was and how do you continue to make sure it is as user friendly as it can be?

Ms. West: Yes, we knew early on that usability was vital. Part of understanding what people want is looking at customer feedback, and that our team is particularly good at listening to our customers. We are not just selling a solution, we are providing responsive customer service. One of the things that I am proud to say is we have taken customer feedback and used that to update our product. One of our major releases that we had, we incorporated two hundred customer suggestions into Project Insight. Part of that included usability and ease of use, but the other part is just plain old features that people wanted. Our team aggregates all of the feedback and sees how much interest is in a specific feature. That is how things get escalated and added into the product. Another important thing is that our development team is based in North America. We are not outsourcing anything abroad. What is nice about that is that the software is developed and designed in a familiar way. We hear

> **"We have a 93% customer retention rate which reflects our responsive customer service."**
> **- Cynthia West, Ph.D.**

about other products that are developed offshore and that they are not as intuitive. Icons and features are not what people expect them to be. There seems to be a cultural difference in development cultures.

CEOCFO: Do you find that many of your customers take advantage of the full range of the software? How do you encourage them to really make use of all of the features?

Ms. West: If we all looked at how we use software in general—I mean, when you take a look at Microsoft Word for example, it does a lot of things, and probably most of us use it for a handful of features. In any package of software, you are going to have features that may or may not be used by specific teams. Often times, customers start using our software to solve specific business challenges. For example, maybe they started by centralizing all of their projects and managing their resources better. Let us say they have achieved those goals. One of the ways that we en-

courage them to expand their knowledge is by offering free training webinars. We run over a dozen webinars per month. We do this to increase our customers' knowledge of the product, so they can get more value out of the software. In addition to the product training, we also offer PMI project management training, which train people on the basic concepts of project management. We found that team members cannot really get the value out of the software if they are brand new to those ideas and concepts. We offer those free of charge as well. Then for IT teams, we also have an IT methodology series. In addition, we have user groups in different cities and offer 'lunch & learns' for our customers. They can collaborate with each other and learn the tips and tricks and creative ways that others use the software. It is a learning experience for everybody.

CEOCFO: What is ahead for Project Insight?

Ms. West: Our goal is to grow our business and maintain our customer base. We have a 93% customer retention rate which reflects our responsive customer service. On the product front we are expanding into more program management and portfolio features.

CEOCFO: What are the intangibles that are important for people representing Project Insight?

Ms. West: We are looking for enthusiasm, intelligence, people that are curious about learning about the software. One challenge that we have had is the segment of project management software is pretty new. It is not always possible to find sales and support people that have sold mid-market project management products before. We can look for people that have sold accounting systems, or CRMs, or have supported technical companies, but most employees are fairly new to all of the project management concepts. They have to be willing to learn. That is why I look for intelligent, curious folks who are able to pick things up quickly and willing to help. Those are all key values. Like most technology companies I sup-

pose, we tend to appeal to young people. We have a fast-paced culture, so our team has to have plenty of energy to keep up with the pace.

CEOCFO: Our readers are primarily in the business and investment community; about four hundred thousand monthly, always looking for services, partners, new ideas. Why should people be paying attention to Project Insight? What makes you a special company?

Ms. West: What makes Project Insight special is that we have the right combination of people, product and process. What do I mean by that? Our people, our team is young, smart, and willing to help. We are a responsive company partnering with our customers to help them succeed. We are not just a vendor selling a solution. We are invested in maintaining and retaining our customer base. That is very important. In terms of product, Project Insight has a strong foundation as one of the very first multi-tenant SaaS solutions. Starting in 2001, we were one of the first web-based project solutions for the mid-market that was NOT client/server based. Our product development team is constantly researching and making sure our product is cutting edge. For example, now our product is HTML 5 which means it is mobile and tablet device enabled. Many of the high end products are not based in HTML 5 yet. In terms of processes, we have well defined systems in place to assure customer responsiveness. Combined these three elements make Project Insight a compelling organization.

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