

OpusView from IdeasCast

Social project management

Executive summary

OpusView is an all-in-one project management, productivity, collaboration and social toolkit. As such, it facilitates the development and change of automated business processes. It is an appropriate choice for a collaborative “mutable business”, in a state of constant evolution, driven by changing customer needs. More than this, however, is that its goal is “Project Social”, which stimulates general “wellness” in the workplace, including improved morale and a more sustainable work/life blend for the workforce.

Key findings

In the opinion of Bloor Research, OpusView will interest organisations who need modern project management tooling, for the following reasons:

- OpusView has a rich set of project management capabilities including reusable project templates, which can be used to facilitate continual improvement
- OpusView keeps your business program and project intellectual property in one place, where it can be shared with other software via a comprehensive REST API.
- OpusView has collaborative and “workforce wellness” capabilities, which are integral to its design and extend its business productivity capabilities to help in the establishment of a healthy workforce in the widest sense. It achieves this by the interlinking of People and Projects at the appropriate intersections; and by providing a capability for recognition and rewards to be directly linked with task execution.

The bottom line

OpusView is more than just a collaboration tool, because of its “social-first” approach, which strengthens the focus on business outcomes; but it also offers richer capabilities than the usual To-do Lists and simplistic Gantt chart manipulation that often passes for project management. One of its key concepts, which may be a true differentiator, is its sophisticated use of Templates – which become reusable repositories for organisational memory. You can build a new project from existing template components (thus encouraging the use of organisational standards); make improvements in the light of current knowledge; and then produce new templates from the project as implemented (thus enabling continual improvement).



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Further, OpusView’s Project Editor (Studio) enables organisations to develop a rigorous delivery method by setting up an overarching framework to manage project flow. Studio enables the design and ordering of the elements, which then map to a templated framework.

Another key feature is the availability of (optional) Rewards gamification, which can be used to encourage desired behaviours around collaboration and knowledge sharing. The difficulties around simply mandating behavioural change explain, in part, the failure of many collaboration projects so far (cf this academic research <https://research.vu.nl/ws/portalfiles/portal/42141599/chapter+4.pdf>).

We think that (providing the organisation has a reasonably receptive social culture to start with) OpusView is a true, and easy to implement, collaborative social business outcome facilitator. For organisations with a basically anti-social culture, it will be harder work, but OpusView probably provides their best chance, with enlightened management support, of moving to the sort of socially-aware, collaborative culture needed to survive as a mutable business.

The product

What it does

OpusView provides the team-working productivity, management, collaborative, and social tools a business needs in one place – giving the organisation using it a seamless, real-time system for managing projects which contribute to a program of business outputs.

Fundamentally, it is about “collaboration with purpose”. It facilitates the formation of the right teams with the best skills and helps ensure these teams know what has to be done in order to deliver business outcomes. Moreover, it ensures that individuals in these teams know what they need to do, that all stakeholders in the program know what is happening, and that necessary and sufficient access to work activities is precisely defined and securely delivered.

OpusView is designed to support digital innovation, digital transformation and continual improvement; for the delivery of successful project outcomes. In detail, Bloor sees it as supporting:

- reduced business project start-to-finish times;
- the building of risk and cost plans;
- simplified communications;
- organised project groups with clear goals;
- faster vision and access to necessary organisational talent;
- silo reduction through collaborative project working and provision of a shared context;
- improved motivation, leading to higher creativity and productivity levels;
- the creation of a "digital memory" in an organisation, which can be recalled anytime;
- effective real-time project documentation.

The benefits that should be achieved with OpusView include the institutionalisation of "Good Practice" and "Good Governance" (and adherence to industry standards), based on the creation and sharing of good practice templates.

Visualizations of project and people performance are available instantly, to all appropriate stakeholders; and, especially, to executives and Project Managers with limited time available.

OpusView comprehensively offers project risk and cost planning; and gives organisations a full, integrated, project management picture.

Technically, it offers event-driven messaging, in real time, through the removal of traditional communication pick-up and put-down bottlenecks and "smart search" for the finding of existing, reusable, assets, which minimises duplication of effort by ensuring that relevant knowledge already created within the enterprise can be found;

Socially, it offers an opt-in model, which encourages talent already in the organisation to engage on published projects of interest. OpusView has a concept of Owners and Sharers on tasks within Projects and propagates "team data" based on a participant's relationship to the project and its other members. Together with its built-in voting and feedback mechanisms, it builds a digital memory, reduces silos and encourages buy-in and the effective use of all the talent in an organisation.

The product is evolving rapidly and brands itself as "Project Social", which it says is beyond just collaborative project management. Using Project Social technology like OpusView improves what is thought of as project documentation no end, but there are always subtle details in the "experience" inside

peoples' heads. We see OpusView helping make this experience available to the collaborating team, which brings benefits beyond just the managing of projects. An important aspect of the "wellness" OpusView engenders is people retention, for example. Personnel turnover is expensive; acquiring new people costs money and reduces project velocity (through retraining etc.). More importantly, however, constantly coping with new people reduces project morale and impacts team-building; and people leaving may lose imponderable business knowledge around "how things work here".

Implementation of the product

According to IdeasCast CTO, Martin Shaw, "OpusView is collaboration with purpose" (i.e., it focuses on the delivery of programs and projects) and was built from the ground up as a SaaS platform although an on-premises model can be requested.

OpusView is designed with productivity and improvement in mind, as exemplified by its support for feedback ratings on templates. Shaw is also well aware that organisations these days will assume rock-solid security, reliability and consistent performance, whether they ask for it explicitly or not, and move elsewhere if they don't get it.

Product architecture

For cloud customers, OpusView sits on the AWS platform and offers the option to reside in a US or EU physical data centre. The SaaS model means OpusView's detailed technology implementation is largely irrelevant to business customers – all that should matter is the services it offers and its SLAs.

Nevertheless, customers contemplating an on-premises deployment will want to know something about the technology choice, as part of pre-purchase due diligence. Bloor thinks that the availability of the on-premise important, but Bloor also believes that, in practice, most customers will try the SaaS option and see no need to move the platform on-premises.

It uses MySQL and MongoDB under the hood, although Shaw doesn't see a significant issue with moving to the other Enterprise COTS (commercial off-the-shelf software) databases if customer-demand drives this.

Shaw is aware that OpusView will not always be deployed in greenfield sites and existing customer technologies will have to be accommodated. It therefore adopts a plug-in architecture so that, for instance, a customer's standard messaging app can be accommodated if desired. OpusView does have its own messaging subsystem (using MongoDB), because alternatives (such as Skype, for example) may not fully support all of OpusView's functionality as it scales to the large enterprise.

OpusView Modules

- **Studio.** An editor for designing and building projects; business and technical users can create and visualise complete project assets.
- **Virtual Assistant.** A voice-enabled Assistant displaying, on request, key event information from all the projects the user is involved in.
- **Dashboards.** An interactive drill-down interface providing, in real-time, key information about all programs and projects a user is involved with.
- **Interactive Gantt charts.** Automatically generated, OpusView's personalised Gantts let the user understand task-level costs, risks and dependencies; and also the overall project timeline, with expected completion dates.
- **Resources.** Create notes and mind maps, and capture and store web links, videos, and documents in support of the tasks in OpusView. All these resources can be shared, and all activity recorded for transparency.
- **Project Risks.** Identify and mitigate risk by creating and analysing contingency, mitigation and residual action plans, so as to keep your projects on track.
- **Real-Time Communications.** Use topic-based chat, message broadcasting and call conferencing with VOIP, to increase work efficiencies directly in your collaborative project streams.
- **Voting and Feedback.** Real-time voting and feedback systems ensure organisational buy-in and help increase participation in company-wide projects.
- **Sketcher.** An integrated canvas editor with visual communication of information, which helps users provide supporting graphics for discussion.
- **Community.** Strong community connections facilitate the creation of successful relationships and collaborative social networks whenever there are business initiatives to complete. Users can find out about co-workers' profiles, skills, and expertise, be notified about new project initiatives in the enterprise, and access and contribute to project-orientated Wikis and Blogs.
- **Sharing.** OpusView has a robust model for permissions and roles; it identifies users as creators, owners, sharers, and specialist groups. Project stakeholders can be both internal and external participants.
- **Search.** Managers can identify potential team members by searching for skills and expertise in user profiles against their requirements. Project information can be made public to users who can search for relevant data to share and consume. This seems to imply organisational and cultural change for many organisations – *"poaching"*

employees from other teams might well be productive for the company as a whole but could be frowned upon in old-fashioned *"command and control"* hierarchical cultures.

- **To-do Lists.** Checklists or routine activities can be delegated, and assigned to co-workers. Vital actions won't get missed, thus making the group more productive.
- **Team Boards.** View project performance, the workload of each team member and status of each task. Easily change work schedules to suit priorities.
- **Templates.** With the Template Builder you can build, and make accessible, reusable components for a variety of business projects. OpusView templates provide project owners with instant access to corporate memory, for meeting regulatory requirements, encouraging standards compliance and maximising project ROI. Successful, proven, project work packages can be converted into templates for future reuse and continuous process improvement.
- **Project Costs.** Manage project costs at individual and team level; and track cost history and adherence to project budgets.
- **Task Management.** Assign task leaders, set priorities and view task dependencies across your projects. Drill down on tasks that need closer viewing or intervention.
- **Work Center.** View peoples' availability and their project working commitments, in order to balance workloads and identify available work resources. View task leaders, schedules and status across your projects, as well as scenario plan for people resources on upcoming projects.
- **Reward Center.** Incentivise and reward project stakeholders, to make sure peoples' work efforts and successes are being recognized and rewarded in a positive way, whether it's weekly, monthly or milestone based. Reward Center directly connects with project execution activities either at group or individual levels, in order to reward achievement.
- **Notifications.** Using event preference settings, both email and real-time desktop alerts ensure that teams keep track of key project activities, scheduled events and unexpected results.
- **Exporting.** Real-time project reporting provides instant (summarised, if appropriate) project information to key stakeholders, which helps them understand the latest performance and status of key activities.
- **API.** This is vital these days and the OpusView REST API is ideal (as long as your applications support REST) for the connection and exchange of data with your favourite software or integration platform.

Differentiators

OpusView incorporates a powerful set of tools that should help organisations cope with the increasingly competitive climate in the 21st century, the new workstyles that are emerging, and the need for enhanced workforce motivation. In Bloor's opinion, it distinguishes itself from its competition mainly in three functional areas: its "social first" approach (workplace socialisation), its component-based templates and its reward gamification.

Workplace Socialisation

In OpusView, individuals and teams are provided with features and techniques to help them to search out and identify people with the best skills for projects. People are enabled to contribute opinions, form consensus, develop knowledge and collaboratively work towards business goals.

Furthermore, sharing with precise access control provides structure. This helps to ensure that people are automatically mobilised with a full understanding of what is necessary to perform the required activities.

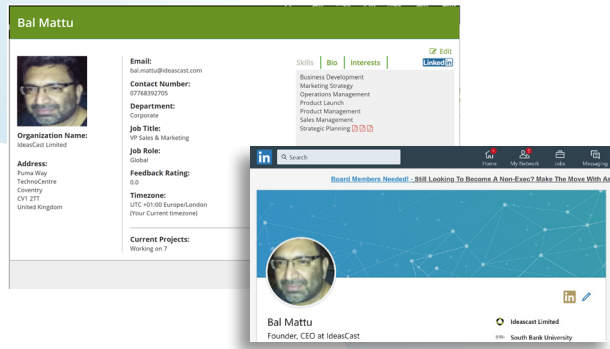
Making projects 'public' using Project Board allows the user community to view project needs; and send appropriate "nudges", and showcase themselves for participation.

OpusView includes a multitude of integrated social features for project working:



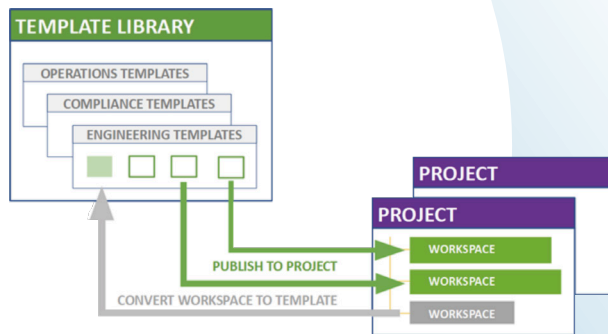
In OpusView, project team members can be searched for and considered, by viewing the profile information that displays their skills, certifications and future availability. Importantly, team members can be both internal and external participants. OpusView's socialisation of human capital is a crucial aspect to solving skills gaps and locating the best and least-loaded people at the point of need.

OpusView also supports direct connection to LinkedIn profiles, which gives a broader view of a person's historical work experience. It also provides the potential for companies to widen their skill searches, in future, to include resources not already used in the business.



Component-based templates

Tried and tested OpusView Templates let users new to OpusView get up to speed quickly, as they encapsulate tried and tested solutions from earlier projects in your company, your industry or related industries. Initial templates are supplied with OpusView, and you can build your own with its Template Builder.



Moreover, building templates helps to preserve company knowledge and examining them can bring new Project Managers up to speed.

The neatest trick here, is that with OpusView you can instantiate a new solution from an existing template, modernise and improve it, and generate a new template to go back into the library for later use by managers. This facilitates Continual Process Improvement.

In summary, OpusView Templates help you to:

- Convert successful, proven project patterns into reusable and repeatable project approaches, and utilise out-of-the-box best practice services.
- Effortlessly hand-pick individual elements from across a portfolio of previous project successes, to rapidly deploy new programs.
- Eliminate the need to always start from scratch and significantly minimise your risk of failure.
- Automatically generate project plan structures and associated activities.
- Maintain important Program and Project IP in one centrally managed library, ready for sharing by anyone across the organisation.
- Accelerate your compliance programs and ensure regulatory compliance is part of your organisation's delivery landscape, regardless of business sector.

Reward gamification

For decades, organisations have tried to improve employee performance and engagement through compensation models, incentive schemes, packaged benefits and ritual back-patting events. The main problem is that these are either costly to maintain or are too low value to have much effect – and, if not handled well, can actually downgrade performance.

OpusView helps nurture a work-force's motivation through its innovative rewards system for projects and its members. Its 'opt-in' model focuses on fairness, expertise and application.

OpusView tokens (OV's) are the common currency for rewards. Projects can be allocated a number of OV's at the start and an OV amount can be given to project members by leaders, where the reward is directly tied to a work activity. This can be granular: for example, a reward for working on a particular project task or risk.

Each project can have its own 'exchange rate' which is used to redeem OV's as cash amounts or used to claim offers in the project shop. Furthermore, members may allocate OV's to a project's nominated charity.

OpusView allows for work recognition at both individual and team levels. For project milestones, leaders and task owners can add accelerators to uplift everyone's reward count.

Importantly, each project member may opt-in/out of appearing in league tables. Because of OpusView's social model, everyone in the project has the ability to see how well people are doing, for those they are connected to via the projects. And because all rewards are evidenced by the activity and the corresponding reason for the reward, organisations are able to foster true intrinsic motivation.

With the OpusView API, rewards can be linked or exported, in order to work with existing in-house rewards/benefit systems, if necessary.

Supporting products

OpusView is designed to enable its customers to build their own collaborative business-outcome facilitation. It isn't designed to require extensive third party consultancy.

Nevertheless, support and training is available, if necessary (often it won't be) from IdeasCast partners such as Xeausoft. IdeasCast supplies Templates with OpusView, to get customers started.

Longer term, IdeasCast sees itself as facilitating a template-based ecosystem or community bigger than IdeasCast around the product. For IdeasCast, it is better to be part of a huge and growing user pool, than all of a small and static pool.

The Vendor

Markets and Channels

OpusView is a SaaS platform, subscription-based, licensed per user, billed annually in advance and sold exclusively via a reseller network. Xeausoft is IdeasCast's managing partner for the UK and Europe (<https://www.ideascast.com/blog/ideascast-announces-european-partnership>) has a strong influence on the product's evolution, based on its extensive experience around marketing the Jama requirements management tool. During 2019, IdeasCast will be developing its reseller channel across the USA.

Reduced pricing is available for selected educational, not-for-profit and charity organisations. On-premises and private cloud installations can be provided where appropriate.

Whilst pre-pay has become a standard for most SaaS Companies, it's refreshing to hear that Xeausoft – with its particular experience of the SaaS market and Subscription models – has explored alternate "Pay per Usage" models. Measuring usage isn't trivial but might help share the risk of adoption between a vendor and its customer. In Bloor's opinion, "pay per usage" should become a fundamental aspect of the "as a service" model for many users, and it's good to see that Xeausoft and IdeasCast are open to this future possibility.

Vendor background

IdeasCast exists to give visionary organisations all over the world the tools they need to incentivise team working, define successful outcomes upfront, manage complexity, ensure consistency, accelerate delivery and execute on strategy with confidence.

IdeasCast was founded in 2015 by Bal Mattu. Bal has a serial entrepreneur track-record in the software industry having previously established several start-ups. The IdeasCast management team have collectively over 100 years of software industry experience.

More information available at: www.ideascast.com.

Customers

OpusView is targeted at mid to large businesses who are tackling transformation initiatives driven by evolving customer demands, have large project portfolios or simply need to manage regulatory compliance requirements in an easy to adopt manner. A typical user could be a manufacturing business with several thousand employees in multiple departments, spread across time zones with fixed term projects as well as ongoing work management; and interested in how to best innovate and bring about repeatable success whilst continuing to look after the interests of its wide workforce.

It seems to be attracting several visionary evangelists as customers, who have built, for example, collaborative CRM and Compliance solutions in OpusView.

We normally interview customers for a Product Sheet but OpusView is too new to have a mass of customers prepared to talk to Bloor “on the record”.

Nevertheless, OpusView does have “early adopters” doing reasonably significant work with it. As long as readers bear in mind that these are early adopters and may will be getting higher levels of support, and may not be typical of the potential customer-base as a whole, we thought it worthwhile to quote some of them, anonymously.

“OpusView is the ideal solution to internally collaborate across business functions to optimise your procurement processes to better manage customers supplier relationships, contracts and costs.”

Managing Director, Supply Chain Management
UK Consultancy

“OpusView offers some of the richest functionality available in any PPM solution and extends this a long way by utilising social-networking capability and principles.”

Head of Transformation Services, Transport Sector

“An ideal solution for any business that has teams working collaboratively on projects. It has all the tools you need in one place and it’s highly intuitive.”

Project Lead, County Council

“OpusView is what Project Managers have long been waiting for. It’s an easy to use tool that promotes communication, collaboration and transparency within and across projects. I’ve looked at numerous tools over the years and OpusView ticks all the boxes for me. Once used it soon becomes indispensable. It saves time and effort and has great reporting and dashboard features.”

CEO, IT Service Management Training & Consultancy

We will be interested to interview customers prepared to be referenced by name and company once OpusView has been “out there” a little longer. For now, we can just say that some people do like using this tool and that this confirms our generally favourable impressions of it.

Competitors

Businesses using MS Project with a myriad of Word processing, spreadsheets, collaboration tools and meeting apps who haven’t achieved the desired business and social outcomes anticipated are a key target. These businesses should find added value, reduced complexity and increased productivity from looking at OpusView.

Current Issues

IdeasCast’s main issue, today, is that it is new to a marketplace with strong competing products. However, good project management, especially in IT, isn’t that common and many existing products aren’t even being used to their full potential. IdeasCast’s “Project Social” approach, and its adoption of a template model and rewards gamification, are pretty innovative, however, and we look forward to following its success in the future.

Summary

As must be apparent, we rather like OpusView. It addresses the Social areas of project management that we think are interesting and important; and its support for project templates and a reward system are welcome.

That said, it is very new and faces strong competition from established projects. Whether it succeeds or not will probably not depend on questions of its design and implementation quality, as long as these are adequate to the job (as we think they are). A start-up entering an established market will always face risk.

What may work in OpusView’s favour is that, in Bloor’s opinion, quite a lot of the people using project management tools don’t use them very well. They are used mechanically, sometimes by people without much formal project management training, and don’t take account of the social aspects of project management. OpusView has the opportunity to take on, and help, customers who are not getting much benefit from existing tools or who are frightened of anything more than a bit of cosmetic Gantt charting.

If OpusView delivers on its promise to involve and educate project managers who are not getting on with existing tools, or not using them well, then it will succeed. Leaving aside the early adopters, who like innovation and the OpusView philosophy, it will then find itself in serious competition with existing project management tools, trying to acquire customers who understand project management and are already using the more established tools effectively. We await that stage with great interest.