

## Cloud-based Project Management App Simplifying Workflow and Team Collaboration



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CEOCFO Magazine

“By my yardstick, the superior breadth and depth of Viewpath’s solution is clearly different from other online apps in the project management landscape. I am not aware of shortcuts in architecting a SaaS application for large organizations. At Viewpath we constantly do extensive planning and engineering to meet a wide range of evolving requirements in the enterprise market.” - Dean Carlson

**CEOCFO: Mr. Carlson, what is the concept behind Viewpath?**

**Mr. Carlson:** Since day one Viewpath has exclusively focused on helping people simplify day-to-day project management with comprehensive online solutions. Our clear product vision equips customers with powerful tools to improve speed, accuracy, and agility in managing many types of project activities.

**CEOCFO: How has that played out?**

**Mr. Carlson:** It is going well. Our company has a broad market presence, and organizations of all sizes use Viewpath as an integral part of their business. We have customers in many countries, including numerous Fortune 500 companies using our application around the world.

**CEOCFO: What do you understand about workflow, management, dashboards and people that allows you to have a system that people are not only using but want to use?**

**Mr. Carlson:** That is a good question. Prior to founding Viewpath I spent a couple decades of my professional career in the world of project management consulting and training. During those years I worked closely with a wide spectrum of project teams – everything from city governments to large enterprises such as Boeing, IBM, Cigna, ATT and Microsoft. That experience gave me a deep understanding of day-to-day challenges people often face in project workflow and task collaboration. Having spent years in the trenches with so many teams, I definitely saw the missing gaps in tools people were using. I think that was a huge help in developing the Viewpath app with well-defined goals to manage project activities and resource schedules in one complete picture. “Knowing up-front we were solving non-trivial technology issues for the enterprise market prepared us for our big investments in engineering and advanced application architecture. Our graphically-rich solution always has to be highly flexible and needs to simplify project management at every level, whether it is a seasoned project manager or an individual contributor in some distant location.”

**CEOCFO: Would you give us an example of how you make it easy, what areas you are able to really make a difference in?**

**Mr. Carlson:** I think it starts with our application’s design model. Right from the beginning, Viewpath has focused on a simple-to-learn interface, even though, we offer a comprehensive feature set rarely found in other online project management. I believe an app has to be simple-to-learn, to enable rapid deployment among collaborative teams. In the early days of Viewpath I made up a saying to convey this usability objective. We still apply this mantra which says: A new

user should be able to learn ninety percent of basic features in ninety minutes or less. It may sound simple to achieve, but in reality, it can set a very high bar. We frequently go to immense extra effort to provide advanced capabilities, while maintaining a fast and efficient user experience. I learned the critical importance of user-friendly project collaboration well before Viewpath. While using other project management apps, I found confusing interfaces and feature clutter can be mind-numbing, and it often creates a barrier to team adoption. For example, I find most people on distributed teams hardly ever use complex tools like Microsoft Project, because it has a long learning curve its use is primarily limited to thoroughly-trained professional project managers. In contrast, Viewpath's carefully configured design has layered functionality for all skill levels, so it can be readily used by everyone on the team. This unique feature layering makes it quick for collaborators to jump on board. Viewpath even lets users add unlimited Guests on unlimited projects for free. Anyone added to a project gets a system-generated invite with a secure access link. Upon login, a user can instantly view his or her assigned tasks, and is up and running on the project in a matter of minutes.

**CEOCFO: *Salesforce is not always as straightforward as one would like. How do you overcome a system that is in wide use, but many people find cumbersome when you have such a useful product? How do you get systems to work well together and how do you overcome any challenges?***

**Mr. Carlson:** I will answer that from the standpoint of a customer-driven decision we made about five years ago. At the time, a number of our enterprise customers said they were going down the road of customizing Salesforce to fit their business requirements, and they would like to incorporate Viewpath to better plan and track their customer projects. It sounded good, since we knew many of these companies had, or about to have, thousands of Salesforce users, and they were investing heavily in the all-important behavior change of getting people to regularly update status on customer communication and related documents such as purchase agreements and service contracts. Once we did the homework, we said to our clients, "Alright, we can use Viewpath's API framework to cost-effectively provide a plug-and-play extension within your customized Salesforce pages." Our initial integration package took us about 7 months to develop and beta test, and was launched in 2012. Fast forward to 2016, we have enterprise clients deriving great productivity benefits from Viewpath's integration with Salesforce. Several of those companies are among the biggest names in high-tech medical imaging equipment and patient monitoring systems. One client uses Viewpath to plan and track their MRI machines being installed in hospitals around the world. Every year this Viewpath customer has thousands of ongoing installations of complex MRI equipment, and each project typically takes numerous months to complete, and can involve hundreds of assigned tasks among dozens of people. With Viewpath's integrated plug-in, these equipment installs are automatically connected to customer records in Salesforce. The project teams are big fans of Viewpath's fast drag-and-drop scheduling which lets them interactively plan project activities and resource allocation, and lets them do 'what-if' scheduling scenarios as new installation projects are added or modified. At any time, the latest status on each customer's project is immediately displayed within Salesforce reports and dashboards. This real-time project tracking in Salesforce is a major time saver, and it ensures everyone is on the same page in delivering successful project outcomes and customer satisfaction. Viewpath continues to make significant investments in integrated offerings since we know our clients like the way we solve major pain points in managing valuable customer projects.

**CEOCFO: *What is the competitive landscape? How do you garner attention, even though you have been at it a long time?***

**Mr. Carlson:** I have to say, in the past few years, I am surprised by the number of new online apps which promote themselves as project management. People often say it is hard cutting through the noise of apps with a project collaboration label. It may sound harsh, but most of the apps are light-weight and only offer features which are abundantly-available elsewhere. Those apps seem to have a similar genesis and built without much research. I can only speculate, they were not thinking beyond a limited use case with simple to-do-lists, comment threads, and document uploads. Many of the apps do not even support basic project planning such as linking task dependencies. Unlike those other apps, I think the scope of Viewpath's platform reflects years of industry experience. I knew if Viewpath was going to be a great SaaS replacement for legacy tools, then it was absolutely imperative to have an unmatched feature stack that enterprises really care about and value year after year. Although thousands of small companies use Viewpath we seldom run across direct competition in larger organizations, which need easy-to-use functions for individual contributors all the way up to senior managers who want capacity planning and cross-project reporting. "By my yardstick, the superior breadth and depth of Viewpath's solution is clearly different from other online apps in the project management landscape. I am not aware of shortcuts in architecting a SaaS application for large organizations. At Viewpath we constantly do extensive planning and engineering to meet a wide range of evolving requirements in the enterprise market."

**CEOCFO: *Are the larger companies really looking for something better? Do you see a trend to make it easier?***

**Mr. Carlson:** We have definitely seen enterprises make a major shift towards SaaS. I think there are several main reasons for that. One; organizations now recognize SaaS can provide big cost savings. Moving to the cloud offers

economies of scale which are often far better than on premise hosting. Two; large companies know they struggle with data silos and consolidating information spread across fragmented tools. For example, somebody says in a meeting, “I would like to have a status report on our mid-size projects in Latin America”. Historically, it has been a tough task to quickly compile that kind of report from disjointed data among ever-changing spreadsheets. Web based tools like Salesforce have certainly improved an organization’s ability to aggregate data on customer contact and sales forecasting. We at Viewpath are proud our platform is part of the growth in enterprises moving apps to the cloud. We need to keep in mind though, most companies are just starting the shift towards online project management, and it takes a while for large organizations to roll out innovative SaaS applications like Viewpath, even when we are a well-proven solution and deliver great productivity gains. It is not uncommon for an enterprise to have multiple rollout phases as some project groups migrate from complex legacy systems and others transition from ad hoc approaches like spreadsheets. It can take those organizations time to get their arms around fragmented processes, and to gather regional consensus on the key data metrics they want to collect and measure. We have instances where Fortune 500 companies use Viewpath with various groups for several years before doing a wide-scale rollout. So we are very accustomed to working closely with customers in laying the groundwork and getting process buy-in from stakeholders. After that, the actual implementation of Viewpath is quick and easy.

**CEOCFO: *What is ahead for Viewpath?***

**Mr. Carlson:** One of our main areas of focus is streamlining mobile engagement on numerous form factors. A core component of that is using responsive mobile HTML5 which works in the browser of any popular mobile device. We are using the latest HTML5 technologies to create a consistent user experience for mobile interfaces. It means Viewpath instantly adjusts to the form factor of a device’s screen size, and it does not matter whether smart phones and tablets are Apple or Android. A user can securely access Viewpath on a smart phone and immediately see “What are the priority tasks that I need to focus on today.” This mobile interface makes it easy for people to update task status on-the-fly. It is then easy for senior management to securely view any updates on reports and dashboards across an entire project portfolio. This high-level summary provides color indicators on each project’s status, and lets the user instantly drill into the details when necessary. More and more we see project collaboration through a mobile lens. In contrast, it was just a few years ago when most people managed project activities on a desktop or laptop. Since our new-generation design runs in a mobile browser, there is no hassle of downloading a device-specific version from an app store, and then continually downloading updates. It is also important to note, Viewpath’s HTML5 code does not consume valuable storage space on the device, like the vast majority of today’s phone and tablet apps.

**CEOCFO: *Final thoughts for our readers?***

**Mr. Carlson:** I am excited about Viewpath’s future. The SaaS sector is finally seeing a convergence of ubiquitous bandwidth, high performance browsers, and organizations actively migrating applications to the cloud. The Viewpath platform has many growth opportunities going forward since our advanced engineering makes comprehensive project collaboration so fast and affordable to implement.

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