



# 10 Reasons to Stop Using Project Management Software to Run Client Implementations



There are software tools built specifically for just about every role in your company, from finance teams to marketing departments to sales teams. But what about implementation managers? Most of the time, you're making do with project management tools that weren't built for your job. Yes, you can probably invite external collaborators to use your project management software, but it wasn't designed to guide and engage them through a process or help them understand what they need to do next. That tool—built with your needs in mind—hasn't existed until now.

Meet GUIDEx®, a client implementation and onboarding software solution built by implementation managers for implementation managers. Our goal is simple: to make you more efficient. If you're responsible for onboarding or implementations, you're going to love these 10 features that make GUIDEx different from project management software.

**Modeling Document**

New project name  
**Not Started** Due: May, 02 2018

Done Working On It Stuck

Click on "Modeling Document" hyperlink in the attachments of this task and tell us how you'd like to the system structured. Update task status to "Done" when finished. If you need help, just tell us your "Stuck" and we will reach out to you.

**Attachments:**  
Modeling Document

View Attachments Upload Attachments

## 1. No Customer Login Required

Not every customer is comfortable logging into a new tool. And not every IT department will let your project management tool get past its firewall. These roadblocks make it difficult to get the client participation that is critical to the success of your project. What do you do? Give your customers and other external users low-friction engagement tools like emails or public-facing URLs.

With GUIDEx, your customers don't need to log into the system to complete tasks. Instead, they can mark tasks as done, keep up on project status, and get reminded of next steps—all through email. Or, if they prefer, they can use the mobile app or log into the platform. Giving your customers choices is the best way to increase their engagement and keep your projects on track.

**OUR GOAL IS  
SIMPLE:  
to make you  
MORE EFFICIENT.**

**With GUIDEx,  
your customers can**



mark tasks as done,

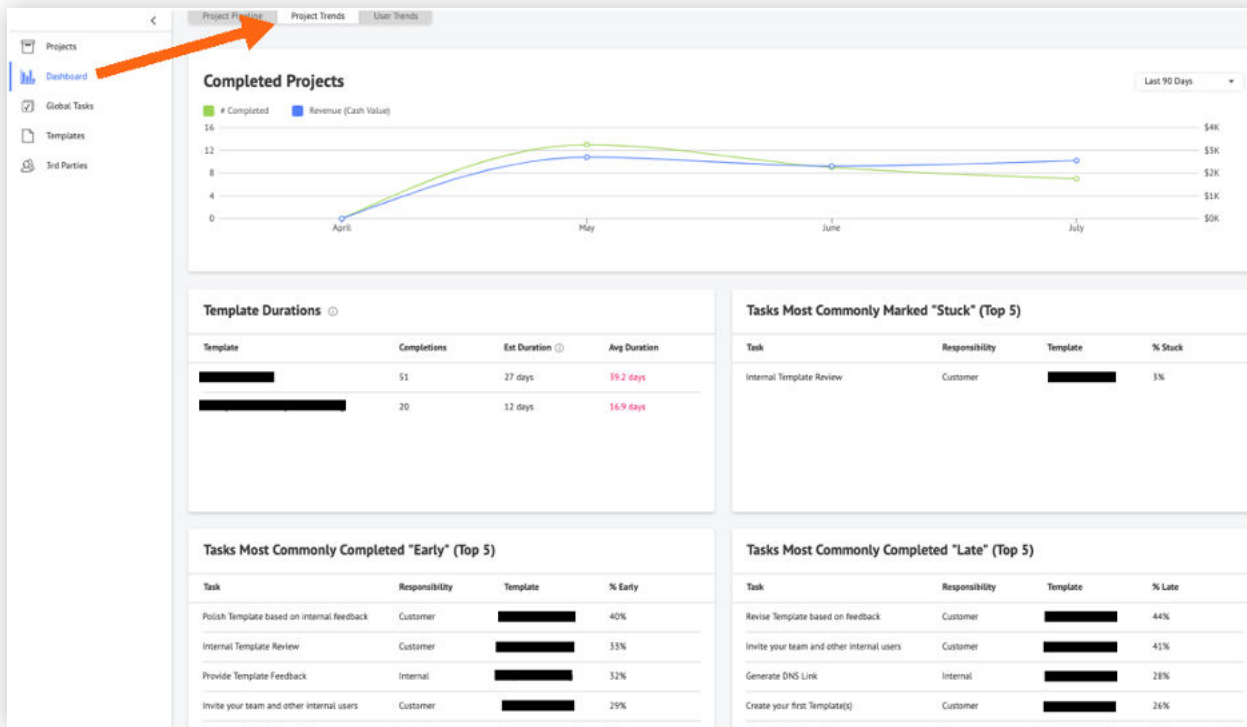


keep up on project status,



and receive next-steps  
reminders

**ALL THROUGH  
EMAIL!**



## 2. Global Project Trend/Logistics Analysis

Standard project management tools let you track what amounts to virtual sticky notes. You can see whether a task is complete and not much else. With such limited information, how do you optimize your processes and reduce the time it takes to deliver your project? Can you tell where the bottlenecks are and which tasks get done ahead of time?

GUIDECx is all about helping you manage and optimize repetitive processes so that you get faster and more efficient each time you run a project. We apply the principles of supply chain management to the implementation process. If that sounds different, it's because it is. But it makes sense: You're trying to deliver a good or service to your customers as quickly as possible. To do this, you need to analyze all the pieces of the process—from the first welcome email to the final handoff. GUIDECx's global project trend/logistics analysis makes it easy to see which tasks and milestones are causing delays and how that affects the project timeline. This is important because if you can measure it, you can improve it.

**Standard tools**  
only provide basic project tracking:


**COMPLETE**


**INCOMPLETE**

How do you . . .



Identify bottlenecks?



Optimize your processes?



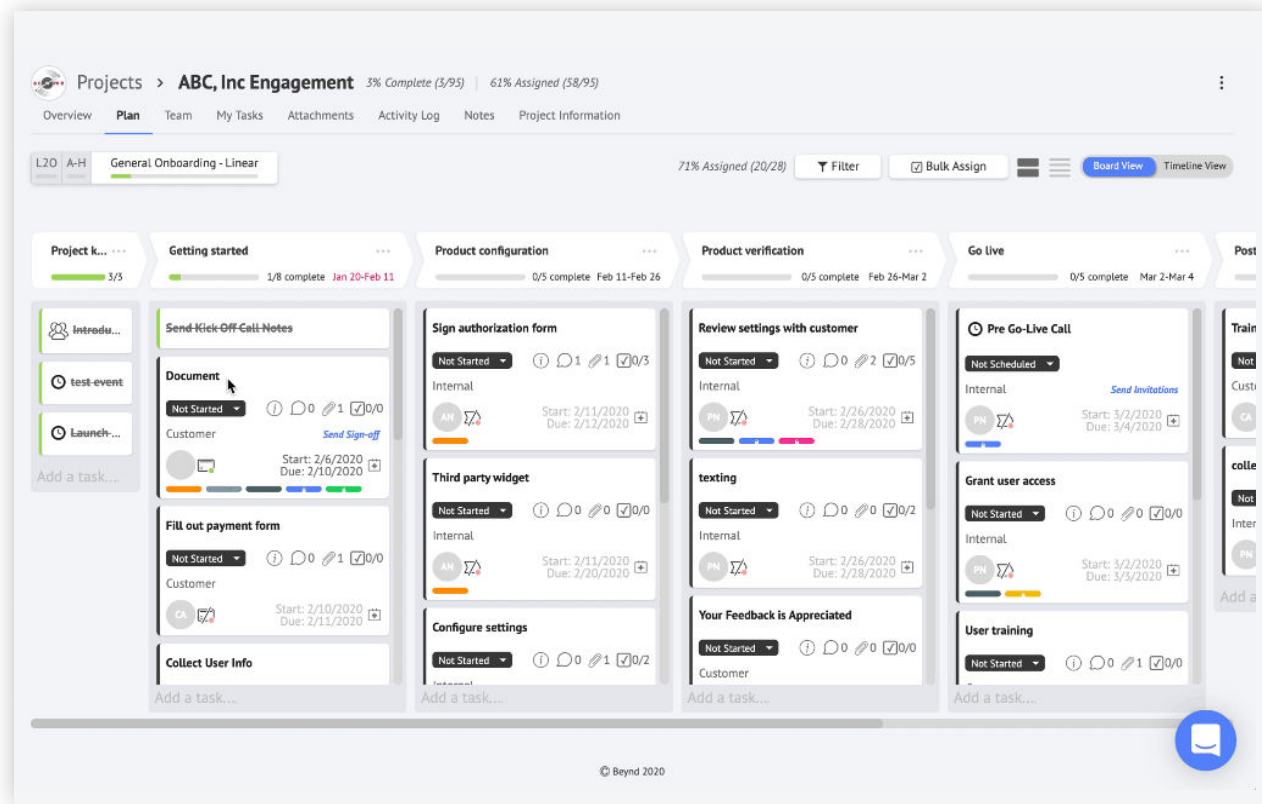
Streamline delivery?

GUIDECx helps you  
**MANAGE + OPTIMIZE**  
 processes so you run your projects  
**FASTER AND**  
**MORE EFFICIENTLY.**

### 3. Restricted Visibility Settings

Few companies want to share internal notes and conversations with customers. To avoid this, many teams use two tools or project boards: one for internal use and one that is customer-facing. This creates a lot of duplication in task setup and tracking and is highly inefficient.

GUIDEcx gives you complete control over what your customers see—and what they don't—all within the same project. If you want to keep something completely hidden from your customers, you can. If you want to give customers full access to a task or conversation, you can do that as well. You can also create limited visibility settings. For example, customers can see the names of the tasks you are working on, but they can't access the internal discussions behind them.



Juggling separate tools to

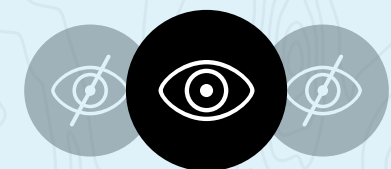


**RESTRICT  
CUSTOMER ACCESS**  
to internal notes  
results in



**REPETITIVE  
DUPLICATIONS**  
and other inefficiencies.

GUIDEcx gives you  
complete control over  
**WHAT YOUR  
CUSTOMERS SEE**  
(and what they don't),



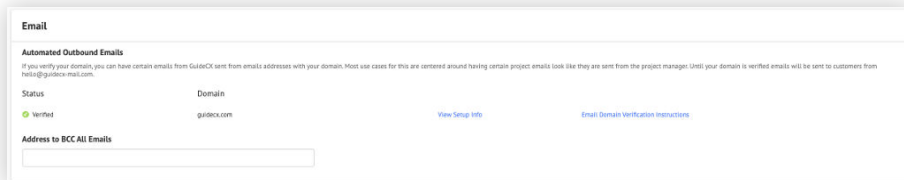
all within the same  
project.



## 4. Automated Emails Generated from Your Domain

If your customers are getting emails from a project management tool instead of from you, the best-case scenario is they're a little confused. But the worst-case—and more common—scenario is that those emails go straight to the spam folder or get ignored. And that means important tasks could get missed.

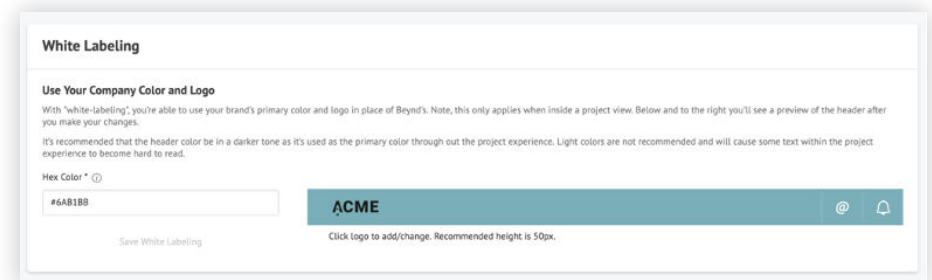
Avoid the dreaded spam filter by allowing GUIDEcx to authenticate your domain directly on the platform, making the email look like it's coming from you and no one else. Not sure if that matters? Think again: The open rate on automated emails going to customers from GUIDEcx is over 90 percent.

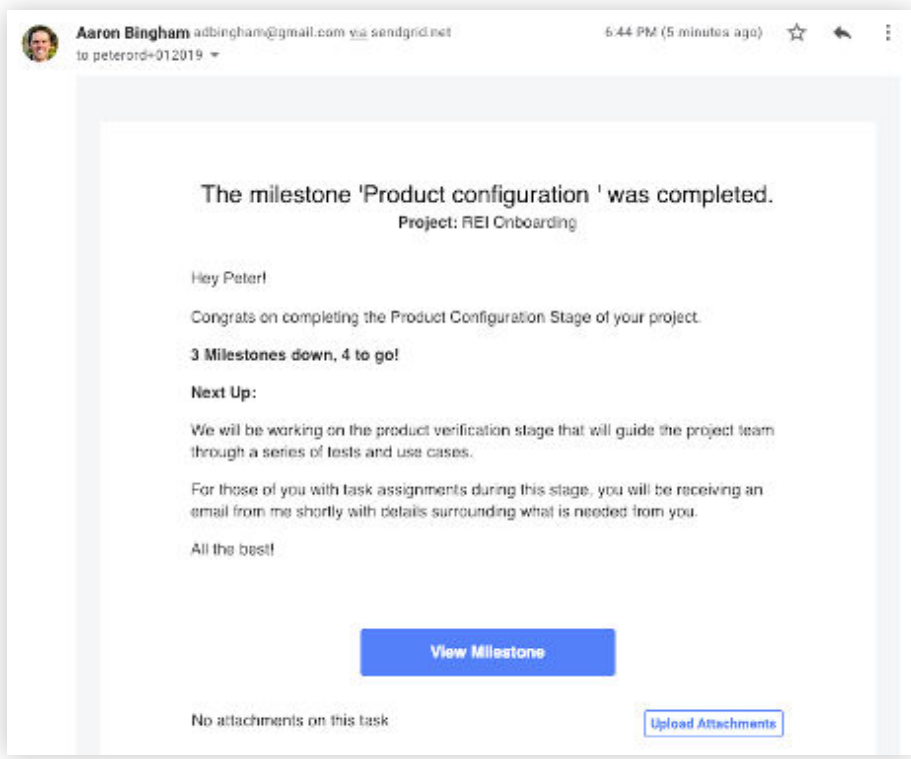


## 5. White-Label Customer Portal

Standard project management tools are great at helping internal projects run more smoothly, but they simply weren't designed for collaborative client work. Things like unfamiliar branding on a project management tool can confuse your clients.

GUIDEcx is a white-labeled solution that lets you add your own branding and colors, so your customers feel like they are working with you and not your project management tool. Creating a more welcoming space is a "little big thing" that makes an enormous difference.





## 6. Next-Step Email Automation

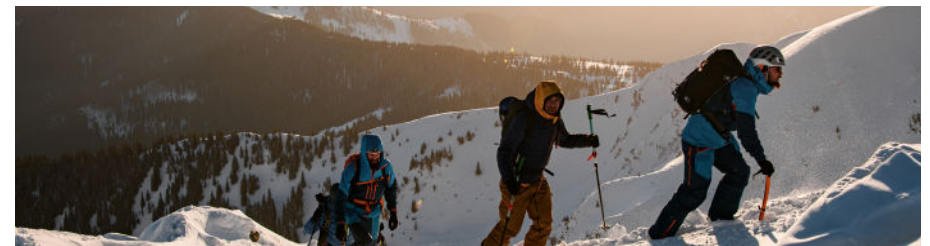
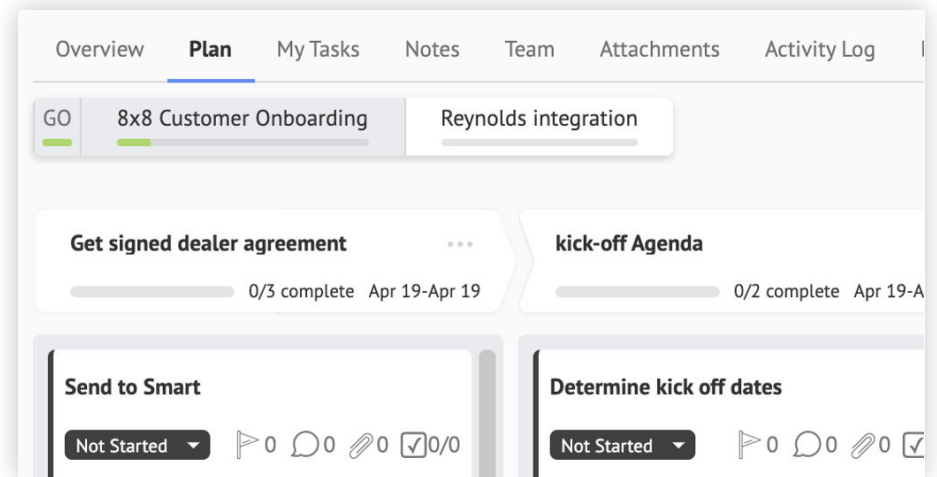
The last thing a manager should have to think about is reminding the next person in line when it's their turn to complete a task. Projects fall apart when you have to spend time tracking work from people you may or may not manage. That kind of wasted time can add up to millions of dollars in lost revenue, especially for companies completing hundreds of implementations a month.

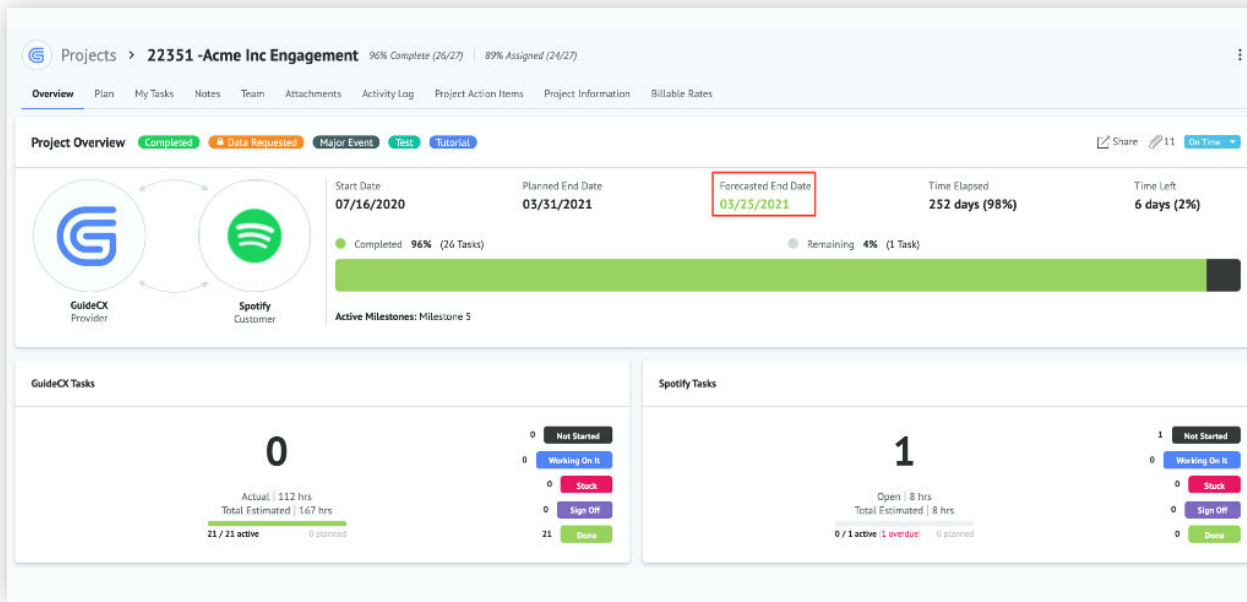
With GUIDEx, you can rely on the system to move your implementation project forward automatically. As soon as one task or milestone is completed, automated reminders go out to all the relevant stakeholders, letting them know what's been completed, what comes next, and who is responsible for it. It's an out-of-the-box way to keep internal employees, clients, and third-party vendors on task.

## 7. Add Multiple Templates to a Single Project

The template engine for standard project management tools requires you to build thousands of individual templates for the variations in which you sell your product. If you are delivering product A with products C, D, and F, that's one template. If you are delivering product A to the next customer, but this time with products B, C, and Z, you have to build another template. It gets confusing fast.

At GUIDEx, our engine allows you to create à la carte templates to establish logic and work projects in parallel or sequential orders if dependencies are required.

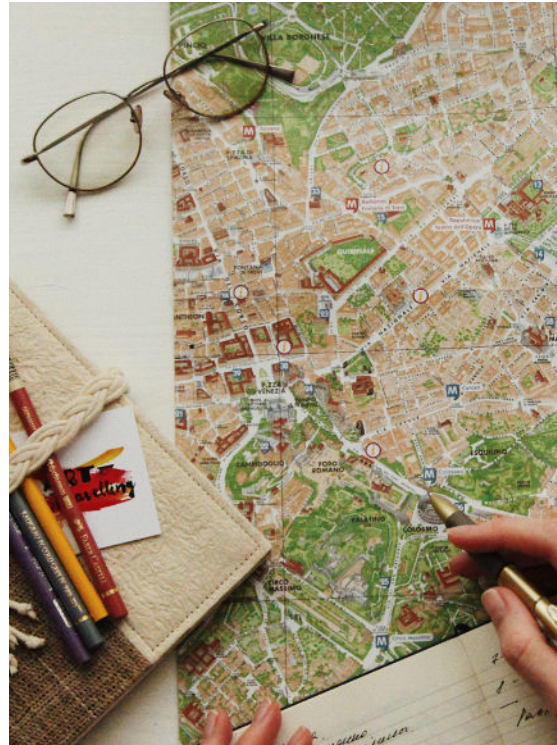




## 8. Forecasted End Date

To accurately predict the end date of a project, you need to establish three things: dependencies, duration, and resources. When stakeholders can see every step of the process, they are enabled rather than managed.

That means if something is late or delayed, they can see why. And that means you get fewer (or hopefully zero!) panicked phone calls from customers wondering what is going on with their projects. When it looks like nothing is happening, customers assume the worst. But when they can see the complete process, they trust the process, even when things get held up by an ice storm in Texas or a global pandemic.



# 3 THINGS YOU NEED TO KNOW

to accurately predict a project's end date:



Dependencies

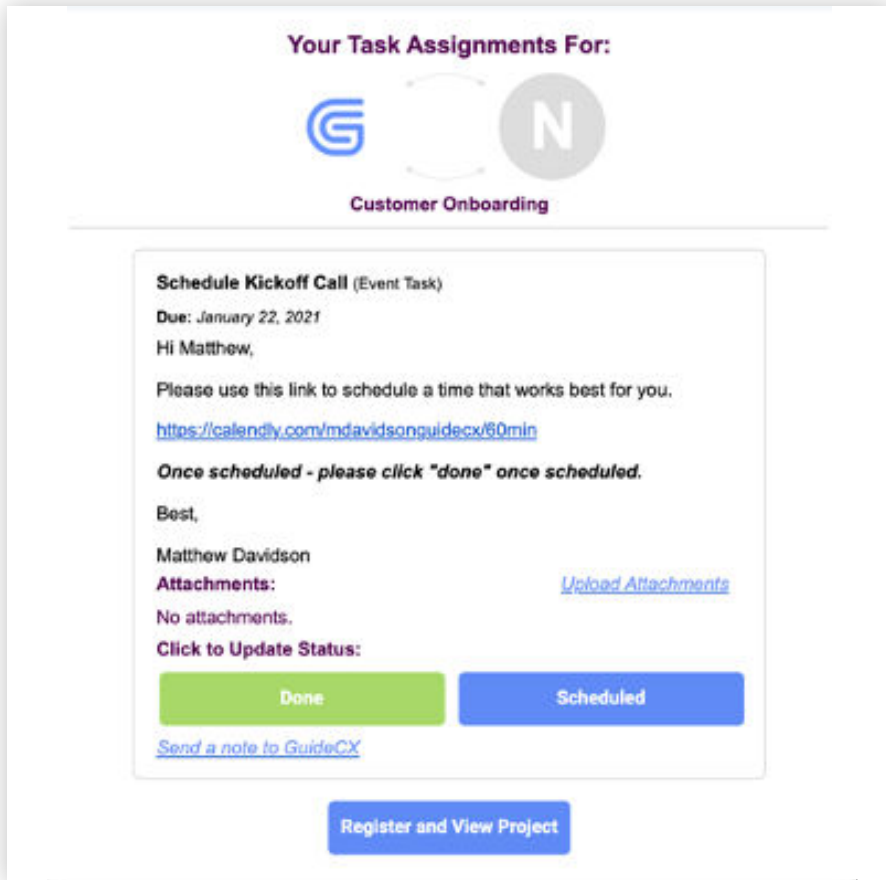


Duration



Resources

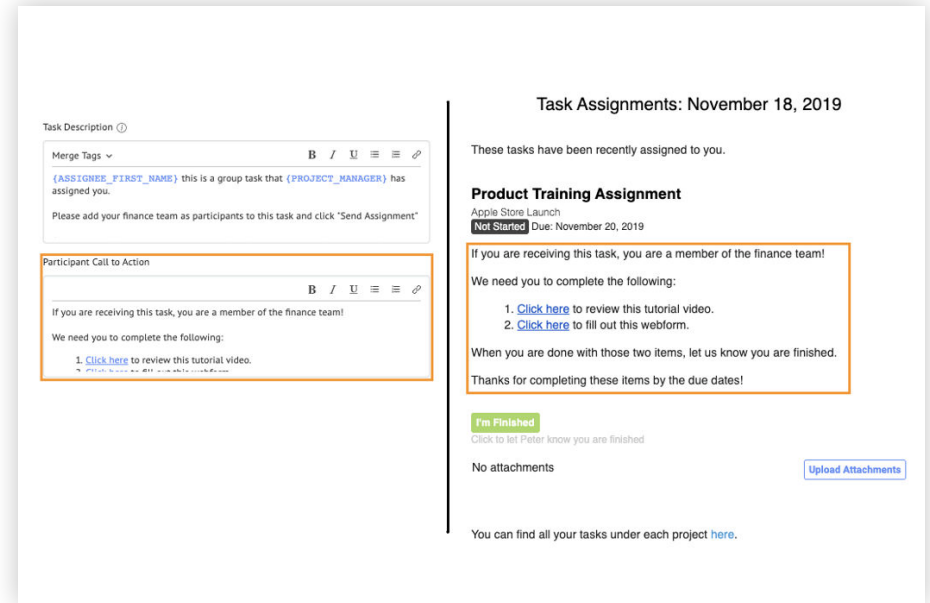
If something is **LATE** or **DELAYED**, stakeholders can immediately see **WHY.**



## 9. Team Scheduling

Do you ever feel like you are going to meetings just to schedule more meetings? Many teams get together only to find that what they expected to be done wasn't and that they'll have to meet again when it is.

GUIDEcX lets you establish meeting dependencies to eliminate wasted time and ensure that customers have completed necessary tasks before they schedule a meeting. In the implementation and onboarding process, communication is king, so you can't get rid of meetings altogether. But GUIDEcX helps you avoid the ones that accomplish nothing.



## 10. Group Task Assignment

At GUIDEcX, we live in a world where we create vertical solutions for tasks within projects. That includes group tasks to help hold your contributors accountable.

Let's say you are onboarding a new customer, and one of the required tasks is for every member of their team to complete a training course. Instead of creating a task for each person who needs to complete the course, you can set up one task and assign it to everyone who needs to complete that step.

GUIDEcX automatically sends each person an email with their task assignment. The task owner receives an email every time someone marks that task as done. Anyone who doesn't complete the course gets automated reminders. If the task is overdue, you'll receive a list of those who still need to complete their step along with a performance data report. This provides a progress report that's normally only tracked in email threads.



# LEARN MORE

about the

## Implementation Software Features that Matter Most

GUIDEcx was designed by implementation and onboarding experts to make your job easier and your customers happier. It's the difference between an OK customer experience and an amazing customer experience.

### Want to learn more about how GUIDEcx is different?

Listen to Harris Clarke and Cody Irwin talk about how to ensure a successful customer onboarding experience.

[Watch Now](#)

