

# PIEmatrix versus Basecamp



**Purpose:** The following is a short study on the differences between PIEmatrix Pie platform and Basecamp.

**Assumptions:**

- We do not know all of the Basecamp functionalities and may be missing some Basecamp information to help with your review.

**Continuous Improvement:**

Continuous Improvement group conducts business process improvement projects for your internal business departments called “stakeholders”.

**Goal:**

Improve business processes with better efficiency and effectiveness.

**Objectives:**

- Obtain clearer understanding of stakeholder’s needs.
- Communicate better with stakeholders.
- Execute faster projects for the stakeholders.
- Deliver higher quality process improvement results for stakeholders.
- Ensure team members have the best possible information at their fingertips on how to plan, execute, and govern their projects, achieving the above objects.


## Planning.


**Objective:** Leveraging reusable knowledge, experiences, and expertise from team members.

**Solution:** Ability to establish standards that have proven project processes for getting the work done faster and better and to continuously improve these processes over time.


**Supporting Features:** Process/project template. Your group may contain methodologies, such as project management and other business processes. Most organizations need to contain and flourish these processes.


### **Static project templates versus dynamic process templates.**

 Basecamp: Provides project templates. The problem is that these templates are static and can only be used for new projects. Secondly, Basecamp does not allow you to create a new template from a modified project. Third, any step you create in the template can be edited or destroyed by the team member, thus completely changing the standard without any controls or oversight.


 Pie: Provides project process templates (PIE Templates). They are dynamic or static, allowing the project manager to update his or her project process with new best practice content in real time. Pie also allows you to create a new template from a modified project. As an example, your project team can add custom steps to their project from your great template. Some of these custom steps may be super for future like projects. With Pie, you can click one button to extract the project changes and make a new PIE Template for your ongoing improvement process. Finally, any step you create in the PIE Template can be marked as not needed by the project manager, but not by the team member. If a step is marked not needed, you can audit to see what were set to not needed and then learn from the field how to improve your process for future use or to discipline your manager for not following agreed best practices.


### **Working with reusable file template documents.**

 Basecamp: You can add a file template document to the project level, but not to the task list or task level. We believe you cannot organize your files in a hierarchical structure. Also, the team members


 Pie: You can add file template documents to the project process box, or step level. The team members can choose their template file, make a duplicate, and place it in the Work In Progress folder, where it's an easy place to work together on the deliverable documents.


### **Independent tasks versus collaborative steps.**

 Basecamp: Main purpose is a task list execution focused. Provides only one level of task grouping, called the To-do List.


 Pie: Main purpose is process and methodology execution focused. Pie uses the term “action steps” rather than “tasks”. The reason is that an action step is a set of dependent activities of getting things done (see dependencies). They are steps moving towards a desired place. Whereas, a task list with no clear process, is just a list of items that may or may not work well for more complex scenarios.


### **Making complexity consumable.**

 Basecamp: Provides only one level of task grouping, called the To-do List. Not the best solution for moderate to more complex projects since they become long lists making it hard for team members and stakeholders to quickly see where they are in reference of the entire project process. This makes it hard for people to consume complexity.


 Pie: Provides multilevel grouping of step activities inside a PIE Template. The first level displays the phases (pie slices) of the project. The second level displays the sub-phases or phase milestones (process boxes). These contain the third level, which are action steps for getting the work done. You can then add more levels as needed with sub steps and sub-sub steps. Pie also provides a visual pie view that resembles a continuous improvement circle. You can also stack together multiple PIE Templates together for complex projects. This makes it easy for team members and stakeholders to just select their process area, simplifying the complex project. Novice project managers and team members can easily consume both a simple, moderate, or complex project.


### **People roles for fast assignments.**

 Basecamp: You cannot establish people roles with your project template tasks. Basecamp only allows you to assign real people names to the template tasks. This might be fine for some small web development firms where the team is always the same on each project. This is not helpful for larger and more complex organizations, such as an academic hospital.


 Pie: You can establish people roles with your PIE Template action steps. This is very important since many projects created from the template will have different people involved. We make it easy for you to assign a role, such as “business analyst” to a number of steps. Then when you create a project, all you need to do is assign a person to that role with one click and then that person automatically gets assigned to all of the business analyst duties.


### **Know-how and your secret sauce.**

 Basecamp: You cannot add descriptions to tasks. These means you cannot pre-populate your secret sauce for helping people success faster and better.


 Pie: You can add descriptions to steps. This is your know-how, your best practice standard guidelines, tips, and useful information to help things not slip through the cracks or get into trouble. Pie is made from the ground up to help you push captured know-how out to the teams and to allow them to help improve future know-how content in real time.


### **Planning for dates.**

 Basecamp: You cannot provide task durations for estimating task date spans. You also cannot link tasks together with dependencies in order to automatically schedule your dates.

 Pie: You can provide step duration time for estimating your date spans. You can also link your steps together with dependency links. This makes planning fast with auto scheduling.

### **Better planning with a Gantt view.**

 Basecamp: No Gantt view. This makes it visually hard to see how the schedule is mapped out for moderate to more complex projects. Since all completed tasks in Basecamp set the date for the day they are completed, there is no way to tell if you're on target or not.

 Pie: Provides a Gantt view in the Planning tab. This makes it easy to visually see how the work is mapped for capacity and utilization. We also allow you to create a snapshot of your schedule for a future baseline comparison with the actual results. This is great for understanding if you will meet your targeted project's end date. You can also use this information to better plan future projects.

## **Execution.**


**Objective:** Communicate better, execute faster, and provide high quality deliverables for the stakeholders.


**Solution:** Ability share knowledge, information about how to get the work done. Ability to identify risks and issues and solve the problems together. Ability to deliver stakeholder needs quickly and without hurting quality deliverables.

**Supporting Features:** The supporting features would need to allow team members and stakeholders to not only know their list of activities, but also know how to get them done faster and better. This information needs to be at their fingertips and in real time. The team members need to be able to converse together while working on their activities. They need to be able to post up concerns with issue or risk notices. These then need to be transparent to make solving fast and effective. They need to be able to know when the work is should start in order to meet its due date. They should also be able to display how much of that work is done. This will save meeting time since you can spend less time at meetings trying to figure out where people are and more time solving problems. They should know that they own their own activities and have the confidence to ensure other


people will not override their work unless specified. They also should get notified when it's time to start to work on their own work.


### **Know-how at your fingertips.**

 Basecamp: As explained in the Planning section, the team members will not have information at their finger tips to know how to best execute their work for faster and higher quality success since there is no way to contain step description. However, the team members do have a page where they can see all of their to-dos for the week. We haven't been able to find a way for an individual to add a personal to-do that is not tied to a project. Not sure if this can be done.


 Pie: Your team members and stakeholders will have all of your best practice information at their fingertips while they work in real time. This is a key power of Pie. On a similar note, Pie also has a personal To-do page. Each person will have the ability to set his or her My To-do page with different filtered views, such as group by date, group by project, or group by list. The group by list is similar to Basecamp's display. The group by date is the most productive and is not available in Basecamp. A team member or stakeholder can manage and execute all of their work directly from this page without ever needing to go to another page. Also, the individuals can add their own private to-do without it being associated to any project. This is helpful for personal day-to-day workload management.


### **Collaboration with message posting.**

 Basecamp: Great collaboration features for posting comments. You can reply to an email and have that information show up in the task news feed. You can even add a non-user's email to a post and have that person get the message. One problem when commenting back and forth is that Basecamp doesn't automatically push the new message to your page while you are chatting. You have to refresh the page. At least, that's what we experienced.


 Pie: We too have great posting features. We invested the past year and a half of developing a new set of social features that resemble Basecamp messaging across action steps. Soon you will have the ability to also reply back from emails to have them post inside Pie step news feeds. You will also be able to add non-Pie users to the email stream and route conversations with them via email. All of our news feeds push the changes to the team member automatically without any page refresh needs. In addition, we make it easy for you to notice when new comments are made without having to hunt them down. Our new Social tab has a subtle pulsating indicator that notifies you with new messages, which can be viewed all in one spot.


### **Posting issues and solving problems together**

 Basecamp: No issue or risk posting or management. This is a big problem unless if your teams never run into issues or risks.


 Pie: Your team members and stakeholders can post a concern as a special issue or risk posting. This places a red or yellow indicator on the step and also roles up to higher-level views, such as the executive dashboard. The issue and risk log report makes it easy for managers and directors to quickly see open problems. With one click, they can not only read the conversation stream, but also jump in with their own comments to help solve and close the issue or risk item.


### **Knowing when to start work to finish it on time.**

 Basecamp: You cannot set a task's start date. You can only set its due date.


 Pie: You can set a step's start date. With the expected duration as mentioned in the planning section above, the user will see both the start and due dates based on expectations.


### **Show in progress work or percent complete.**

 Basecamp: A team member or stakeholder cannot set a task as in progress. It's either not started or completed. That is fine for very small and short tasks that can be done within one day, but if the task takes a few days or weeks, you cannot use this model.


 Pie: Team members and stakeholders can mark their own steps as in progress and even set percent complete. This is helpful for a few reasons. One it drives the due date of that step since the step will most likely have an expected duration. Secondly, the start date can indicate if the due date will be met or late.


### **Don't mess up my work (privacy controls).**

 Basecamp: When a team member or a stakeholder is given access to a project, that person can edit anyone else's task.

 Pie: en a team member or a stakeholder is given access to a project, the project manager can decide on the spot if that person can only edit his or her own step or have the ability to edit others with a role called Project Administrator. In addition, there are other permission and visibility settings that the administrator can set up for a new user, such as executive read-only view across a department, a project creator, or a PIE Template content author.

### **Let me know when I'm up next (workflow notification).**

 Basecamp: No workflow capabilities. No use of task dependencies.

 **Pie:** You can establish workflow capabilities that will trigger email notifications to the team members when their work is now ready to work on. For example, let's say I have a step called "Document and publish the new process scenario for approval". The next step is called "Review and approve new process scenario document" and that one belongs to you and the director of the stakeholder department. Once I mark my step done, Pie will automatically send out an email to you saying your step is now ready along with any detail information about how to get it done. Secondly, you can set up the approval step to be a "group step", that means both you and the stakeholder department director would automatically get your own approval step, so you can each mark your approval separately (automatically created as two substeps).


## **Governance.**


**Objective:** Have the transparency to know what is going on in real time across your portfolio and the ability to make faster and smarter decisions.

**Solution:** Ability to review a visual dashboard showing what is going on, where the problems are, and what to do to solve them.


**Supporting Features:** The supporting features would be a simple and visual dashboard with the right level of information. The dashboard should balance speed with real-time critical data, including portfolio progress, problem indicators, and drill down capabilities. You should also be able to pick up the phone and get instant help from the vendor since your business needs to continue and grow without delays.


### **Review progress across your portfolio.**

 **Basecamp:** No portfolio view of your projects.


 **Pie:** You will have a visual dashboard showing what is going on in real time. The color indicators (green, yellow, and red) will provide a quick-glance visual on where are the successes, risks, and failures. A project manager can manage his or her set of active projects from the dashboard. The progress bars and milestone dates show where they are. Executives and stakeholder directors can have messaging conversations with the project manager directly from the dashboard portfolio progress or issue log pages. They will have multiple ways to set up personal filters so the next time they log in, they can quickly access their personal dashboard view.


### **Drill down, make decisions, and take action.**

 Basecamp: No portfolio progress view. You basically work on open to-dos at the task level. This can be too much information in the Basecamp calendar where there are 7 managers running 50 projects with 500 participants.


 Pie: You can view the high-level portfolio view. You can review project data information, such as project budget, or relative priority. You can review the more complex projects with a one-click detail view. This page can show a complex project with multiple process streams from a stacked PIE Template. If you want to go further, just click again to open the project and review the high, medium, and low-level progress indicators throughout the project.


### **Keep our departments separate.**

 Basecamp: No ability to structure business units.

 Pie: You can establish business unit structure for managing visibility across your enterprise. An executive in the one department, such as Continuous Improvement group would see all projects in that unit. However, the IT executive will not be able to see those projects unless that person is either assigned to this business unit or is part of a higher level parent business unit. Your organization will define how to set this up.

### **Provide the best resources to help your team be successful.**

 Basecamp: Self training. Self help. No real person training. No real person support help.

 Pie: We offer not only good ways for self training and self help via our robust online Help Center, but we also can provide an onsite train-the-trainer program where a live person will come to your door and help your key people become experts with features, know how to strategically use our platform, and learn how to train other people within your organization. We offer free phone and chat support along with email support. We are located a block from your IT office and a half dozen or so blocks from the main hospital location in Burlington. We are Vermonters and we work to build Vermont jobs.