Customer Success Story

Cloud Four: Conquering the Mobile Web, One Project at a Time

LUCID meetings

Executive Summary

Cloud Four is a small web design and development company based in Portland, Oregon. Passionate about the mobile web, the team's expertise lies in building websites and apps that work seamlessly across any device.

As Senior Project Manager, Megan Notarte is responsible for making sure that technical requirements are communicated clearly between her team and their clients. Since Cloud Four often engages in highly complex technical projects, this can present a challenge.

Megan and the rest of the team use Lucid Meetings to collaborate on notes during client meetings, coordinate action items to keep everyone focused on their share of the workload, and share notes once the meetings end.

> *"Prior to using Lucid Meetings, we had no solid conference call and screen sharing solution. We had hobbled together various tools (free conference calling and various screen sharing services), but it was far from seamless.*
>
> *We also had no good way of collaborating on an agenda or sharing meeting notes and action items."*

The Devil is in the Details

Project managers in any industry must be highly detail oriented and able to keep an entire team focused in order to lead everyone to a successful project completion. Scope and requirements can change at any time, so it is imperative that the project leader **record decisions as accurately as possible** along the way.

In order to be successful, Megan relies on the following Lucid Meetings' features to flawlessly take her projects from idea to final launch:

1) Collaborative Note Taking

Brainstorming ideas, clarifying requirements and making decisions are usually the main reasons why a project team meets with a customer. However, keeping track of all of those details is harder than most people realize.

Since one of the first rules of project management is "document, document, document," Megan makes sure to take accurate notes during every meeting. If she misses a piece of the conversation, other team members or her customers have the ability jump in and help by adding or editing any of the records.

When everyone can see and contribute to the same minutes during a meeting, both teams are committing to a shared plan and walk away with a high level of clarity and certainty about how they will proceed.

> *"If the meeting is fast-paced, I will often ask participants for some grace as I make notes during the meeting. I clean them up before sending around after the meeting is over."*

2) Task Assignment and Management

When a meeting starts, teams typically spend time reviewing previously assigned tasks and discuss the progress of each. When participants make decisions on upcoming milestones, Megan can use Lucid's Action Items to designate who is responsible for each one.

The ability to easily assign tasks to team members creates accountability in the group because they are highly visible to all attendees.

3) Meeting Follow-Up

Once a meeting ends, Megan will read through and edit notes, review action items, and email all of the records to attendees with one click. Recipients of the email will only see the specific tasks that were assigned to them, and they can log in at any time to review past meeting notes.

> *"It's nice to have screen sharing, note taking and calling all integrated into one interface. Also, distributing meeting notes could not be easier than it is with Lucid Meetings."*

She also uses the integrated sync to Basecamp, her team's preferred project management tool, to keep everyone aligned on upcoming milestones.

Having online meeting records is a huge benefit - especially if stakeholders or team members change throughout a project - because anyone can access the full project archive at any point.

> *"As the tool has matured, **it's become an essential part of our toolbox of client communication."***

Conclusion

The team at Cloud Four loves to work on interesting mobile design and development projects with their customers. However, keeping team members informed with all of the same detailed technical requirements and decisions can be difficult.

Megan uses Lucid to keep traction on all of her projects with a high level of communication at all times. She can document decisions, assign tasks and due dates, view the entire project in Basecamp, and easily send out professional meeting records to both the team and their customers.