



# Verto 365

The work collaboration platform for everyone

**Procurex Wales 2022**



Crown  
Commercial  
Service  
*Supplier*





Yn falch o fod yn rhan o Fframwaith Cymru Gyfan

## Proud to be part of the All Wales Framework

We pride ourselves on being close partners of the public sector within the close-knit community of Local Authority and Health Sector organisations across the Welsh network. In March 2020 Verto 365 joined the NWSSP All Wales framework as sole supplier for Project Management allowing your organisation to join others including Welsh Blood, HEIW, Cardiff & Vale UHB and NHS Wales Shared Service Partnership. Our Welsh public sector experience also extends beyond to Local Authorities and Housing Associations.

With the rapid introduction of MS Teams, the Welsh public sector isn't alone in moving increasingly towards a collaboration and joint-working approach. What follows is the need for digital suppliers to ensure software features and capabilities further improve value for the public sector, by flexing and scaling in ways that suit processes and methodologies they are already accustomed to. For those with issues around capacity, Verto 365 helps optimise available resource by providing pathways to productivity and efficiencies, delivering tangible benefits for users and stakeholders alike.

Verto 365 cements positive governance structures but also plays an important part in aligning the culture of an organisation. The tools allow for autonomy to flourish at various role levels within departments as well as alleviating pressure in certain areas, which in turn benefits the whole ecosystem.

We thank our Welsh clients for their dedication to bringing Verto 365 to life within their organisations and look forward to new and fruitful partnerships with central and local government and developing our already established work within NHS Wales.

# Workspaces - Manage what you do

**October 2022** – Today, Verto 365, the popular project management app for Microsoft Teams, launches Workspaces, a new approach for a wider section of the workforce to manage work in ways that suit them.

Workspaces are dedicated areas that hold task information and documents relating to a piece of work or activity within Kanban Boards. Kanban functionality is already heralded as one of the more able productivity methods and are well-known by many within today's workforce. Verto 365 have now included advanced Kanban features, with all the capabilities available within the Microsoft Teams platform, which increases the accessibility to the powerful organisational tools for anyone at any level and within any role with tasks to manage.

A user's Workspace operates as a personal activity hub or can be shared with colleagues to co-create and collaborate on work they are doing together. The home dashboard will allow people to navigate through each area to help build in more functionality if required, invite colleagues to share work, and use links to helpful web pages and the Knowledge Hub.

New users can enjoy three Workspaces for free and create as many Kanban Boards as needed with a total of 250 cards. Following these limits, prices start at £5 per user, per month for unlimited Workspaces and cards. Verto 365 then scales up depending on the work you do and the demand for the complex tools to help you do it.

Workspaces have been designed with the knowledge that productivity is personal, and people seek different ways of handling their work activity to feel they have achieved each day. Verto's Workspaces can be set up and used in ways that work best for the individual so they can manage in the way that suits them best.



# Current Partnerships



UK Research  
and Innovation



Department for  
Business, Energy  
& Industrial Strategy



Gwasanaeth Gwaed Cymru  
Welsh Blood Service



GIG  
CYMRU  
NHS  
WALES

Bwrdd Iechyd Prifysgol  
Caerdydd a'r Fro  
Cardiff and Vale  
University Health Board



GIG  
CYMRU  
NHS  
WALES | Partneriaeth  
Cydwasaethau  
Shared Services  
Partnership



Cyngor  
sir ddenbighych  
denbighshire  
County Council



Innovate  
UK

# Denbighshire County Council case study

Denbighshire County Council have been using Verto for their project management for many years now. But as well as mapping and managing the types of large and complex project work expected of a Local Authority organisation, Denbighshire place great importance in tracking all outcomes from each and every project delivered, and have a dedicated arm of the business looking after the measurement information around measuring all project performance through Verto.

The council has recently renewed its Verto contract, which will see the council move into its next 5-year plan as an organisation.

## The on-going work

They required one complete system that would help keep control of all the council's frameworks, of which the main document is the current 5-year Corporate Plan running from 2017 to 2022. The plan concentrates on 5 priority areas, as set by the council, and have been worked on from both the project and performance divisions, all through Verto.

To shape the next plan, the views of the public, stakeholders and staff via surveys, and the learnings from previous consultations will help structure the priorities moving forward to identify what ambitions should be set for the next 5-years. But as well as looking to the next, the current plan also has to be closed off appropriately, which requires functionality from Verto to aid with the coming together of all activities within the time frame, whether the 2017 ambitions were met, and what benefits can be realised.

### Our Solution

Having one single system was key to house all the strategies across all priority areas. While Verto was already being used to help run projects, Denbighshire then decided to work closely with Verto on the performance side of things.

They were instrumental in helping develop a new build to include customised performance management tools that complemented the existing project tools already in Verto. While many companies focus on projects or performance, and therefore look for either a project system provider, or performance system provider, Verto can deliver both and have all connected information and reports in one central repository : the single version of the truth.

### The Future

The platform continues to be ever-evolving, the system has to remain logical, up-to-date and useful to the teams who are using it.

The project team are currently in talks with TMI to further develop aspects of the Verto platform, such as reporting and specific language used that reflects terminology that makes sense internally at Denbighshire. Once this is complete, the performance team will also work with TMI to match their functionality in order to maintain a streamlined and intuitive set of tools.

# Working with Welsh Blood Service

The Welsh Blood Service is responsible for the collection of blood in Wales, and of the distribution of blood products to hospitals within the country. As well as managing blood donation and distribution, they manage other related functions such as research and development into public health and therapies and a substantial amount of fund raising and awareness to increase the country's blood levels for donation.

## The Challenge

The team didn't need a project management solution, but instead required an electronic platform to manage change, partly because there was a regulatory requirement for the organisation to track the change they were managing but also a business planning element so they could manage their capacity to deliver the change. They chose Verto due to its configuration capabilities, meaning they could manipulate the existing platform from having a project management focus, to one that would suit their processes and incorporate their change management needs.

The benefits included the use of the gateway system, usually intended for projects and programmes of work to move through their various stages, but in their case, were able to reconfigure it to track the various stages of change and move the various documents through in a much more effective and visual way than their old paper-based system.

## Onboarding Verto

During the last 18 months, Welsh Blood have been using their bespoke Verto system aligning the gateway stages with their processes. Now they are starting to explore using project management functionality in even more detail to manage some of the change aspects within projects as needed. They are also creating their own dynamic dashboards, suited for all levels such as senior management, department heads, as well as individuals to drive a positive culture of accountability and ownership to the change managers themselves.

# Working with Welsh Blood Service

## Onboarding Verto

The organisation has witnessed a big improvement having moved from its paper-based system to Verto's fully digital collaborative platform. It has also been tasked with learning a newly implemented business planning element at the same time, so a lot of training and support was factored in. However, Welsh Blood weren't short of buy-in from users wanting to move away from the old way of doing things, so implementation was accepted across the organisation as the focus was on embracing Verto's benefits and communicating the visual process more clearly.

*"Verto has completely replaced our paper-based system, which was a huge undertaking for our organisation. With the continued support from the Verto team, we have been able to move to a completely digital process for tracking and managing our change management programmes and tailored the Verto 365 platform to fit our needs and processes."*

**Rhianydd McGovern, Project Support Manager at Welsh Blood**

### Additional information

The 'Verto club' is a monthly meeting involving several like-minded organisations within Welsh Heath who also use, or are looking to use, Verto. The meetings are an idea sharing space to develop knowledge on Verto best practice and ways to improve day to day working. Verto members also frequently attend to provide updated information, new functionality and useful knowledge around Verto's roadmap.

Verto's versatility allows it to be configured by all its customers over time to become a powerful solution that matches the ever-changing processes they need.

Verto enables each department and organisation to create its own configuration but link and report across multiple sites. For Welsh Blood, reports were developed with specific needs in mind to benefit certain departments and roles within Welsh Blood. Continuous improvement mechanisms are also firmly in place, so the system continues to evolve to provide relevant and required enhancements. While Verto is a project management solution first and foremost, Welsh Blood has proven that the platform's scalability and impressive customisation means it can be used to further advance all organisations regardless of its structure and current level of digital maturity.

# The new Verto 365 app is now approved by NHS Wales to access directly from within Microsoft Teams

search Verto in the AppSource\*

November 2021 - The Verto 365 App for Microsoft Teams, that provides a solution for any organisation to manage complete projects and programmes, launches on the popular collaboration platform.

Verto 365 marks a significant shift in user experience as there is no need to navigate away from MS Teams to use or manage any aspect of the project process from within the main Verto site. Everything can now be done directly from within MS Teams.

*"Following the Verto 365 demo, we're really excited at the prospect of using Verto's project management tools straight from MS Teams without having to navigate from one platform to another on a web browser. It's going to make managing projects a lot simpler for our staff and we anticipate greater engagement from it!"*

**Greg Patel-Harris,  
Corporate Systems Manager at West of  
England AHSN**

For those not using MS Teams, Verto 365 is also available via a web browser, showcasing the new updated view and all Verto 365 functionality as found within the MS Teams app.

Verto 365 allows new users to sign up for complete project management software to be used in its entirety from within MS Teams. The app allows for complete project management from within MS Teams, including the use of Kanban boards, flexible dashboards, Gantt charts, risks, benefits, finances and every detail needed to successfully run projects and programmes on any scale.

For those looking to test the system across their organisation, Workspaces have been launched for free, and can be used by anyone in any role. Set up a Workspace to hold as many Kanban Boards as you need to bring and manage all your task information and documents together in ways that help you be productive and organised.

\*If your organisation has yet to whitelist external apps, please contact us or your IT Dept to request Verto 365



# Why it's important

Verto 365's seamless Single Sign-on process eliminates the need to remember and input login credentials across multiple platforms each time you want to access your project information. By accessing all your work from within the familiar Microsoft Teams platform, where workforces spanning many industries already communicate and collaborate (especially as hybrid or remote-working teams), there is now no need to navigate away to manage your workstreams, share documents, and control and report on data. And you can still maintain effective communication via the chat functionality and link-sharing features with your team members regarding their actions. The benefits of integrating this effectively with Office 365 is also evident when uploading/downloading documents directly from/to your OneDrive folders from Verto 365, minimising interruptions to your flow of work.

## What's next

Verto are user-led in their approach to continuous improvement and are excited to work with their existing clients, already making use of Verto 365, for the next phases of development. With the release of Workspaces, we aim to introduce Verto 365 to a wider section of the workforce requiring flexible methods to manage their work in the way that works for them. As a small and agile company, Verto are one of the first organisations to exploit the new opportunities that Microsoft's deep integration abilities now offer, and by simply asking, "why not?", they have re-designed MS Teams into a fully functioning task management platform to bring ease and simplicity to organisations', often complex, working practices.



Verto 365 enables  
Microsoft Teams to become  
your complete project  
management tool

This is more than basic integration. Using cutting edge technology from Microsoft (such as OpenID and the Graph API) Verto365 embeds a wide range of work management tools directly into Teams. Transform Teams into your all-in-one project management system, or use within a browser window with exactly the same view and functionality.

# Contact Us

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