

Project Management Software Evaluation Checklist

By Adam Hughes

- Your Team Characteristics**
 - Size.** How big will your team be?
 - Location.** Will your staff be co-located or work from a variety of locations?
 - Tech savvy.** Evaluate the overall technical aptitude of your team.
 - Working style.** What types of tools would help staff work efficiently?
 - Existing tools.** Evaluate with an eye toward what is lacking.
- Your Customer Characteristics**
 - Location.** Are customers located within or external to your company?
 - Tech savvy.** Evaluate the overall technical aptitude of your customers.
 - Transparency.** Decide how closely customers need to follow your progress.
 - Reporting.** Determine what types of project reports will help customers the most.
 - Meeting logistics.** How often and in what fashion you will meet with customers?
 - Communication.** Decide which modes work best.
- Your Project Characteristics**
 - Project type.** Categorize your upcoming work as software development, process redesign, etc.
 - Financials.** Determine how much money your company will invest in the overall project.
 - Scope.** Determine how long your project will run.
 - Dynamics.** Will the types of projects you engage change dramatically in the next year or two?
- Potential Software Characteristics**
 - Budget:** Does the software fit your budget, or is there a scaled-down version that will fit your project?
 - Technical requirements.** Will you need additional hardware or expertise to implement the software package?
 - Hosting.** Is the software hosted by the vendor, or will your company need to manage it?
 - Ease of use.** Is the software easy to use, both for technical and non-technical users?
 - Transparency.** Does the software package allow customers to follow project progress?
 - Remote collaboration.** Does the software support a geographically dispersed workforce?
 - Communication.** Can the software facilitate electronic communication with customers?
 - Mobility.** Is the software system mobile friendly?

- Expandability.** Can you add new users to projects without incurring additional costs?
- Future considerations.** Does the software agreement include regular upgrades?
- Vendor Characteristics**
 - Stability.** Has the vendor been in business for more than a couple of years?
 - Client profile.** Does the vendor serve other companies similar to yours?
 - Business practices.** Does the software company have any outstanding complaints with the Better Business Bureau?
 - Liability and security.** Do the proposed contractual agreements protect you in the case of potential data loss?