Project Management Software Evaluation Checklist

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# Tasks:

☐ **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?*

☐ **Remove 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 Bureu?*

☐ **Liability and security.**

*Do the proposed contractual agreements protect you in the case of potential data loss?*