

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?

- 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 Bureau?
 - Liability and security.**
Do the proposed contractual agreements protect you in the case of potential data loss?