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 work-force?
  - ☐ **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?