Project Management Software Evaluation Checklist

By Adam Hughes

	Yo	our 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.	
	You	ur 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?	
	Po	tential 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?
Ve	ndor 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?