

Buyer's guide to project management software

Selecting a project management solution isn't easy and you can face some difficult considerations: How can you match internal needs with solution capabilities, not just today but as you grow? What should you look for to determine if a solution will be easily adopted or not? What are key integration and configuration considerations? These are just some of the questions you may be struggling with.

In this executive report you will discover more about the project management software landscape: the strengths and weaknesses of traditional tools along with today's modern alternatives to help you sort through what's important, what works—and what doesn't.

On-premise or off-premise?

When considering an on-premise or an off-premise solutions you must take into account the benefits and the costs of such a solution. For on-premise solutions it is important to know the upgrade policy, the support policy and the overall total cost of ownership.

Given the advantages of hosting a solution elsewhere, today's enterprise often opts for SaaS solutions because of the convenience, flexibility and ability to easily scale and support remote and international teams. For cloud-based solutions, you need to ask about security and compliance of the specific vendor and understand how configurable the solution is to your specific business processes.

It is critical to know how adaptable an off-premise solution is and what level of automation it provides. Another important consideration for any solution is the overall time to value. Not every solution is quick to implement or demonstrate value. Doing the due diligence and discovering what a typical implementation looks like is important in organizations where there is pressure to gain immediate ROI from a software investment.

How secure is the system?

When it comes to cloud-based vendors of portfolio and project management solutions you need to ask essentially three questions in terms of security and compliance. Is the vendor ISO 27001 compliant? Do they meet SOC 2 type II compliance? It's also important to know if your organization requires a solution with additional security and compliance requirements above and beyond the best of breed compliance standards.

THE BREAKDOWN

Traditional project management tools can't keep up with the pace of today's business.



Inefficient resource utilization



Poor visibility



Limited data capture and reporting



Solution:

Overcome these obstacles, manage projects and collaborate across the enterprise with a solution purpose-built for today's enterprise.

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The vendors you evaluate should not only be open and clear about their security policies but they should be able to provide penetration test history, audit trails and full compliance reports to demonstrate they are following industry-established standards.

What's the integration strategy to other business software?

Key things to evaluate around integration include discovering if the vendor has an open API or if they charge extra for API access. It's also important to know if the system has out-of-the-box integrations with other business critical applications like Salesforce and JIRA. You can avoid costly service engagements or other connection problems by having integrations built in—versus solutions that only package integrations with third-party vendors.

Is there real-time visibility into operations and beyond?

In a modern portfolio and project management office you need to be proactive and not reactive to information about the overall projects and portfolios that are being executed.

Relying on outdated information for a project or portfolio can result in disaster. Unfortunately, traditional tools for portfolio and project management often have information that is out of date even at the time that a project manager updates the project plan.

In addition to allowing team members to move faster on “good data,” having visibility and real-time information encourages adoption and accountability as everyone is in the loop. It also reduces overlapping duties and double-work while giving an accurate state of the business. Project managers can immediately know the health of their projects, based on team member input. This all rolls up to executives so that they can see what's going on and act accordingly at any point in time.

Are reports, dashboards and business intelligence included out of the box?

As you evaluate vendors, it is important to determine if reports and dashboards are an integral part of the solution or a bolted-on feature. If they are separate, discover if they are an extra (hidden) cost as well. You should discover if reports and dashboards are set up to show real-time information or not. Also find out if they can be shared with external stakeholders: customers, suppliers and partners if necessary.

Reporting shouldn't require a professional services engagement to set up. There should be robust reports available within the tool to give users an easy starting point to create and customize their own.

At Clarizen, we have a Fortune 100 professional services customer that has enabled thousands of project managers to create their own reports and dashboards for sharing reports with their clients—giving them a real-time view of project status. Service delivery is critical and setting customer expectations and gathering immediate input and customer intelligence can mean the difference between a happy customer and a churn. Project managers can also update reports that directly rollup at a regular cadence to executives.

Can you collaborate in context; does collaboration move work forward?

Traditional portfolio and project management lack the notion of collaboration. Discussion based tools often are more noise than relevant content, and conversations are often based in channels as opposed to the work that actually needs to be done.

For an effective PPM solution you should ask if the conversations and collaboration are results oriented and include the correct people to get the work done without creating excess noise. Conversations need to be purposeful — not like Slack, Yammer, Jive — where it's just noise, not in the context of the project, issue, or task, that you're working on.

Can you take action from conversations and use them for audit purposes, for approvals and to provide business context and data? Social collaboration is important but it should happen with a purpose.

A first-class PPM solution should automate your processes as required by your business requirements.

Can you easily secure work and conversations based on permissions?

In large organizations, there can be many projects, programs and portfolios being executed at the same time. Executive leadership should have visibility into all of these projects and their operational progress, however you need to ask the question – are team members, project and program managers only given the level of visibility that makes sense for their role.

In today's environment, with remote and geographically dispersed teams, where multiple departments are working on projects together, you need flexibility in the tool to have private versus public projects, conversations, issues, etc.

This isn't something you would necessarily know or see in a vendor demo, so you need to ask the questions about the level of permissions and security options that you have.

We've had customers come to us from other vendors where the solution isn't flexible to meet their matrix security options.

Can you have discussions with customers, partners and suppliers?

Assuming that you can bring in customers, partners and suppliers and the conversations and discussions within your project and portfolio management solution you should then understand how the solution will protect your intellectual property. Can it allow you to limit conversations where an outside party is involved? You should also ask how difficult it is to set up his level of permissions or if these permissions come out of the box for your PPM solution.

Customers now expect instant response from their vendors, they expect a white glove service experience. Our customers use an external collaborator feature that allows clients access to a portal where they can see the live project work plans, provide feedback, review documents and raise and resolve issues.

By collaborating with customers you can prevent scope creep, align expectations and work on a single shared plan together. You can also capture customer feedback and execute on customer input to give your clients a true sense of partnership and ensure customer satisfaction.

Can the software solution automate your business processes?

Many businesses and operations within businesses have their own unique processes to accomplish work. By automating these processes, organizations can be more flexible, agile, responsive and ultimately move faster to respond to changing market conditions. There are some PPM solutions that only have limited options for automation. However, a first-class PPM software solution should be able to adapt and automate your processes as required by your unique business requirements.

Meanwhile, configuring a PPM solution should easily map to your processes and not require custom code or a prolonged services engagement.

For example, our customers can easily modify the request approval process for a project: who is notified, who has to approve it at what stage of the request lifecycle, and what files are required to move to the next stage in a gated process. These are all common processes that customers need to automate, and many solutions do not offer the flexibility needed to make the configurations without manipulating code or requiring professional services.

Can automated workflows be triggered from an email or a mobile device?

Email is a fundamental business object and many PPM solutions only offer a limited connection to email systems. However, a modern project management solution should expand beyond the basic communication and correspondence and allow you to trigger automated workflows from email, out-of-the-box.

How responsive are the vendor's support, training and customer success teams?

Any piece of software that is critical to business operations needs to have support, training and customer success teams to make sure that you are successful in using the software solution. Ask about the responsiveness of a vendor's support teams, training programs and customer success and implementation teams. If the vendor chooses to outsource any of these key functions you need to ask how reliable and consistent are those outsourced teams. If the vendor delivers supportive training and customer success from internal teams, discover what they will provide as you implement and use your project and portfolio management solution.

Can you align and define business objectives when prioritizing your portfolio?

Business organizations have different objectives and key performance indicators that indicate the overall health of the business. A project and portfolio management solution should be flexible enough that it can take into account overall business health indicators when selecting and prioritizing projects to be executed as part of a portfolio. A PPM solution should not simply assume that net present value return on investment or other financial metrics are the only considerations when prioritizing a portfolio. Enterprise organizations have multiple lines of business and are managing diverse portfolios. Each portfolio needs to manage their own selection criteria, but they also need to make sure to align to organizational objectives as well. So you need to make sure the PPM solution you select offers the flexibility to align to organizational as well as corporate objectives—and gives the PMO the flexibility to manage their own portfolio of project metrics as well.

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Checklist summary:

- Security compliant?
- Integrates with your software?
- Real-time reporting and dashboards built in?
- Provides business intelligence you need?
- Relevant purposeful collaboration?
- Secure conversations based on permissions?
- Collaboration with customers and partners?
- Automates your business processes?
- Responsive support, training and customer success teams?
- Defines organizational objectives when prioritizing your portfolio?

ABOUT CLARIZEN

Clarizen is a global leader in collaborative work management software, bringing together cross-company project management, configurable workflow automation, in-context collaboration and a tailored, role-based experience, all built on a secure, scalable enterprise platform.

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