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GUIDE

TO BUYING
PROJECT MANAGEMENT

SOFTWARE

IN 2019

Introduction

Step #1 — Considerations:

1. Team (Size of the team and how they like to work)
2. Projects (Why types of projects are you looking to complete using the software?)
3. Needs Analysis (Figure out exactly what you need)

Step #2 — Getting Stakeholder Analysis & Feature Selection:

1. Product Landscape
2. Top Features to Consider

Step #3 — Finding the Right Software:

1. Selecting Software
2. 7 Questions to Ask
3. 5 Key Considerations
4. How to Run a Test Pilot
5. Pricing Considerations

Step #4 — Onboarding:

1. What happens after the sale?
2. 5 Ways to Train Your Team

The Future of Project Management:

1. Purchase for today, purchase for tomorrow
2. Analytics
3. Artificial Intelligence

A Simple Checklist:

- A brief checklist of everything you need to do

Gone are the days where Microsoft Projector Excel were your only options for project management software. With an overwhelming number of solutions, how do you choose? In this guide, we're going to help you navigate through the murky waters to a blue ocean of decision-making bliss.

What is Project Management Software & Why do You Need it?

Projects come in all different shapes and sizes. Some are simple with few people and resources involved. Others are large and complex. Because all projects are unique, they have their own problems. For a project manager, those problems normally stem from the overwhelming amount of aspects that require tracking and organization. Project management software can help solve those issues by keeping all resources, tasks, project planning, client management, billing and communication centralized in a single collaborative space.

According to the The 2019 State of Work & Project Management Survey, only 36% of project managers claim to use project management software. The rest, adopt productivity tools that their company already uses, such as Microsoft Excel or Google Docs. Theses tools are workarounds for not purchasing Project Management software for small teams that work on non-dependent tasks. If you're projects are more complex than that, PM software is not just a bonus, it's a necessity.

At Easy Projects, we speak with a lot of companies. The conversations we have with prospective customers help us

understand what issues organizations are trying to solve using project management software.

The ones we hear most often are :

- Missed deadlines, leading to expensive delays;
- Team leads and team members unable to prioritize, leading to a focus on non-revenue generating activities;
- Delayed invoicing due to unmet milestones (resulting in cash flow challenges);
- Mismanagement of people, money, equipment and time;
- Lost contracts due to bad client management;
- Inaccurate time tracking and billing leading to revenue loss.

If you have any of the above issues, implementing work & project management software is the solution. The right software will help you effectively navigate and digitally transform how your organization works.

In this guide, we're going to walk you through the steps you need to take to purchase the right software solution all the way through to implementation . This will help you better prepare for the journey.

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STEP #1:

DETERMINE WHAT YOU NEED

The first step to buying PM software is to have a full understanding of your current processes, where the gaps are and how software can help fill those gaps. You need to understand exactly *why* software is needed.

If you have the resources, the first thing to do is set up a "change management" team. This is a small group of individuals who are responsible for conducting a needs analysis in full to answer the following questions: *Is there a need for project management software and why? What problems will it solve?*

Tip: If you do NOT have the resources for a change management team, that's ok — it's easy enough to figure out on your own. We'll tell you exactly what to do below.

Considerations to keep in mind when conducting your assessment:

Your Team

Your team (s) is (are) the most important part of the decision

because they will be using the solution on a daily basis. Knowing the way your team(s) is (are) organized and how they like to work will help determine the features required. Here are some questions to consider:

- Do they work remotely?
- Are they on a mission to cut down the number of meetings they have?
- Do they need to log hours for accurate billing?
- Do you have a PMO that manages project portfolios?
- How many teams are there in total? (Capacity)

Projects

Every project team is different as is every project. The project management methodology that your team uses most to plan and complete work should be taken into account when choosing. Knowing this will help you understand how robust you want the system to be and, again, the required features.
Some of the most common methodologies that PM software is built around are:

- **Waterfall** - Where projects are planned sequentially
- **Agile** - Where projects are planned and executed in a way that allows for flexibility

- **Kanban** - Where projects are planned visually & sequentially

You can learn more about these methodologies in our Project Management Guide.

The good news is that many major players in the field have recognized the need for flexibility in the approaches taken to complete a successful project. They have built platforms that allow for that. This does not mean that one-size fits all. It just means that one-size can often be quite accommodating to many if you're focused on finding a solution that allows for your teams to work how they want.

Legal & Procurement

If you work within a larger organization, you'll have set protocols on how to go about selecting a vendor to work with you. More often than not, your organization will have already vetted options for you which are in-line with their legal requirements and also met their security requirements. It's best to check this list before spending time searching for a new solution. Also, if you are selecting a *new* software for your team, remember that the process will be long (it can sometimes take 6-8 weeks) so make sure to account for that when planning your timeline.

STEP #2:

STAKEHOLDER ANALYSIS AND FEATURE SELECTION

Once your Change Management Team has identified a need, it's time to move on to the stakeholder analysis. In this stage, you must compile a list of features that your end-users require. You'll likely produce a very long list and will have to decide between what's essential versus fluffy features the team does not need/is not ready for. Make a short list of the most important ones and go from there there.

Product Landscape

There are an overwhelming number of solutions available, especially if you don't know what you're looking for. To make things easier for yourself, determine what size your organization is and the number of projects on the go at one time. Are you an SMB, Mid-Sized or Enterprise company? Depending on your answer, your feature requirements will be different.

Features to Consider

Below is a list of features that most companies consider. You'll notice that as the list progresses the features become more complex.

STAKEHOLDER ANALYSIS AND FEATURE SELECTION

- ## Task Management

Task management is the foundation of most project management tools. This feature helps assign due dates, update progress, organize priorities and dependencies. It normally comes with messaging, file sharing and notifications capabilities as well.

- ## Time Tracking

As projects are generally tracked by time, this feature is a must-have. It allows for accurate tracking of wages and client billing. Make sure that the platform that you're shortlisting offers an app that allows team members to track their time in real-time, anywhere.

- ## Project Planning & Scheduling

Building off of the previously mentioned features, project planning requires both Task Management and Time Tracking to work properly. This feature allows for milestones, timelines, and critical path planning. It's often also accompanied by some sort of visual representation, like an interactive Gantt chart.

- ## Reports

Reports help stakeholders to get an overview into how projects

are performing. They can be as simple or complex as you want. Reports can also display data that paints a clear picture on project health, KPI's and EVA. Ideally you want a solution that will enable you to export data as well as one that supports custom reporting. It's a lot of work to build reports from scratch so reporting templates can be very helpful.

- **Resource Planning & Management**

This is one of the most sought after features for companies who are growing because that's when things start to get confusing. Resource management helps you plan projects according to employee skill set, availability, and then putting them on the right projects. This features makes sense for companies that have many projects on the go with available in-house resources.

- **Client management**

If your organization delivers projects for internal or external clients, then a client management feature will be helpful. Client portals grant clients insight and allow for participation in their project. Ideally, they should be able to give input and leave comments, including submit issue and requests. A client portal should also allow for quick and easy approvals.

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- **Integrations**

As your team grows, you'll want to accommodate their productivity needs. Maybe they started off using a small productivity tools that they're hooked on. You'll need to make a list of what those must-have tools are and make sure that the platform you choose can integrate with them. This will make managing the transition that much easier.

- **Portfolio Management**

If your company has a lot of simultaneous active projects, it's important for management to group projects together for better analysis and prioritization. Project portfolios allow executives to ensure that their teams are working on the right projects in order to maximize resources for better returns. This feature is ideal for large organizations who are focused on optimizing workflows and results.

- **Budget Management**

Project budget management is key for the success of any project. This feature is important for all sized organizations as it will allow you to track budget against the actual cost of the project helping you to keep an eye on the revenue & profit and then allowing you to optimize it through built-in calculations.

If you're a serviced based business who bill hourly, then the budget feature is essential.

- **Security**

Though security is often overlooked as a function of the product, it plays an extremely important role in the digital age. If your projects are being stored in the cloud, you must be sure that the vendor you choose has or supports password protection policies policies, encrypted traffic, user-lockout, and options like Private Cloud, and data encryption at rest.

Tip: We suggest consulting your current teams. Team members will be able to help by adding requirements that you may have not initially identified. What we know for sure is that many people want to change or get a project management platform that allows for ease of use so that the tool they invest in actually gets used.

STEP #3:
SOFTWARE EVALUATION

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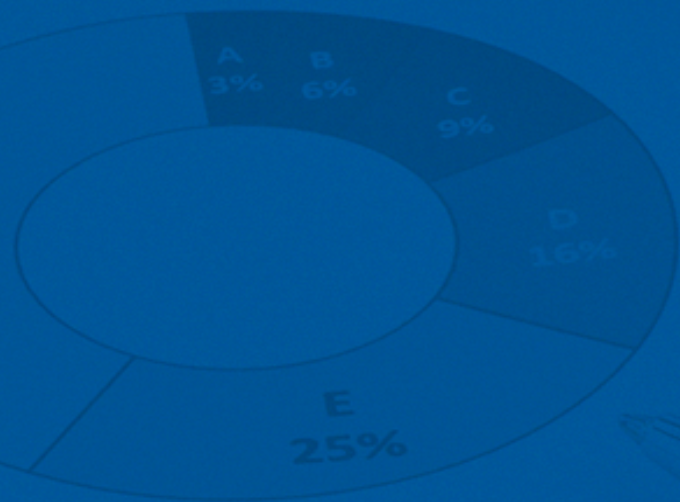
Now that you have your shortlist of features, it's time to get into looking at software options that fit your criteria. Just a few years ago this used to be a painstaking process of Googling and checking out individual software websites one...by...one....Today, there are many reliable software review sites that you can turn to for help that have already done all the work for you. You'll be able to compare features, plans, read reviews,

Here are a three top sites to check out:

- [G2 Crowd](#)
- [Better Buys](#)
- [Capterra](#)

Most software review sites have a lot of information available. This can become overwhelming when there are so many data points to consider. **When you read the reviews there are just two things you want to know about:** *Ease of use and customer support.* If a company is getting rave reviews for both of those there's probably a good chance your team will adopt faster.

Selecting Software

You've made your list of requirements, you've read the reviews and you now have a short list of 3-5 products you're interested

in - time to sign-up for some demos and trials.

Normally, this begins by requesting a demo and having an initial call with a sales specialist. During the call, the sales specialist may ask some of the following questions so have your answers ready - they will only help you in the end:

1. Describe your typical project by stage and the typical duration.
2. What are the key milestones? Do you budget time?
3. How do you start your projects ? Who is responsible for initiation? (management, clients, stakeholders, PMO, etc?)
4. Are there any review / approval stages?
5. What are the expected deliverables?
6. What is the Impact if the project is delayed or deadlines are missed?
7. What other software systems are used and at what stages ?

SOFTWARE EVALUATION

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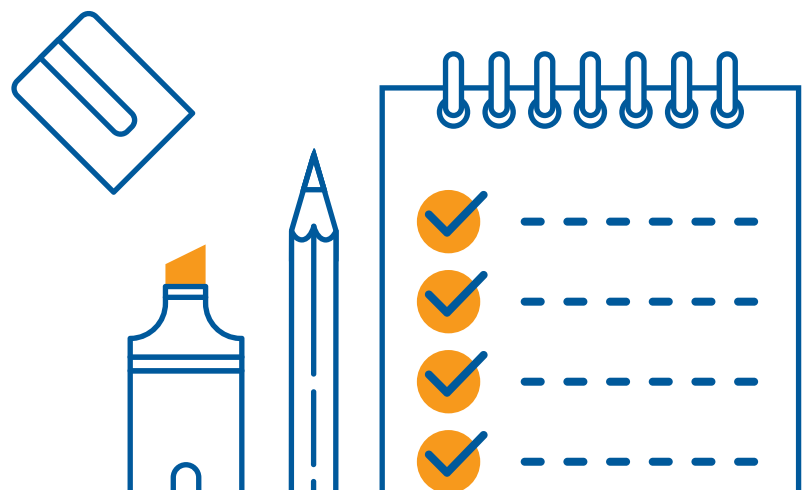
Tip: If you have a number of stakeholders involved in the decision, it's important to set up a demo with each of them whether it be everyone together on one call, in small groups or individually. This will help all stakeholders evaluate their own needs and processes and decide whether the software is a good fit for them.

If you want to know exactly how to execute the trial period & run a test pilot, please see our 9 Tips on How to Run an Enterprise Trial.

As you and your team analyse and test out the different options, you need to narrow down your focus once again. There are five main aspects to keep in mind when doing a deep dive into your shortlisted platforms:

1. **Ease of Use** — This one is important because if your team won't use it because the learning curve is too sharp, it's useless. Also keep in mind that there is no magic solution out there that your team will adopt quickly. Each product is different and the good ones all

require some form of training and onboarding because they want to make sure that your team is successful in the long run.

2. **How long it will take to implement in part or in full?** — Implementing and rolling out a new platform is a project unto itself. How soon can you be up and running? How much training is involved?

3. **Integration requirements** — What productivity tools does your team already use that must be integrated with the new platform? Will the tools you're evaluating allow for this and how complicated will it be to set up?

4. **Configuration requirements** — What special requirements might you need? Do you need special tracking set-up? Profitability, Stress Levels? A different language? Make sure the platform can support your special requirements.

5. **Data Migration** — This one is important for companies who already use another platform. If you need your workflows, projects, and all information securely transferred over, is it possible? How long will it take?

Tip: This is a general overview on how the process works, the deciding factors will vary based on each organization's needs based on size and project count.

Test Pilot

Narrow down to your top two softwares of choice. Once you've got two, it's time to run a pilot of the same project on both platforms with the same team. A pilot is simply a life like experiment conducted in a monitored environments (in this case within the software of choice). Choose a workflow that your team is most familiar with and see how they do with it. The sales and customer happiness teams should most likely be there helping you set it up so you have a good experience with the product. A test pilot will last anywhere from 2 weeks to a month so pick a small doable project for that time frame.

Pilot post mortem

Your team has successfully completed the pilot. Do what you

would do after any project and conduct a post mortem. Once you've collected all of their feedback - you're ready to make a decision.

Tip: Sometimes it's a really close call. You like both the products, you like the people at the software company, you like how they do business and the prices are the same. So now what? That's the part where you need to think ahead. Ask your vendors about the features or offerings that they have coming out in the future. If their product road-map really lines up with what you want and how you want to grow then you've got yourself a winner.

Pricing Consideration

A lot of vendors will suck you into using their platforms for free, or some will charge you an arm and a leg.

What you want to focus on when purchasing is *the quality of*

SOFTWARE EVALUATION

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the product that you're getting and the value it will deliver when implemented correctly.

To calculate the value you need to use an ROI calculator to see how quickly your projects will break even and be profitable. If the returns are quick and within your realistic expectations - then it's worth it. Example ROI Calculator.

The other thing to be weary of are those pesky hidden costs. It's not uncommon for sales specialists to avoid talking about small costs, but they do add up. If pricing is a sensitive issue for you, it's best to ask about hidden costs upfront.

Here is a list of common additional costs to consider:

- Setup fees;
- Training fees;
- Hosting fees;
- Integration costs;
- Cost of having your IT department involved for maintenance;
- And others...

STEP #4:

ONBOARDING & USER ADOPTION

So what happens after you've made a final decision and sent out the cheques?

Depending on how many user licenses you bought, you may have also purchased an implementation package.

Implementation packages are a very important part of the sale because they make sure that your investment is worthwhile.

Your vendor will work to ensure their product is configured for your needs and that everything is set up the way you want. Beyond that, they help train your team so that the user adoption rate is high, your team is happy and that you see the return on your investment as promised.

How to get the most out of your Training Package

Break down the trainings by user group and only focus on the things that would be most valuable to them. The marketing team doesn't need to know how ticketing requests work and the tech support team doesn't need to know how to access the project analytics. This will prevent everyone from becoming overwhelmed by everything they have to learn in a construed

amount of time. It keeps things nice and focused.

To make onboarding successful, it's important to treat training as good learning should be: tailored. Every user group is unique and will be using the platform in their own ways.

There are many ways to engage your team — here are a few:

- **Group Trainings**

As mentioned before, group trainings are effective when training specific teams to learn how to use the software for their own purposes.

- **Lunch & Learn Sessions**

To run a lunch and learn for a particular group, identify 1-3 issues they are having or want to learn more about and teach them.

- **Train the Trainer**

Choose a few people who will be the lead experts on the platform. Ask your vendor to thoroughly train them on the ins and outs and then make them the official trainers for everyone else.

- **Offer peer to-peer Coaching**

Eventually, certain team members will become very good with the new tool or they may have had extensive training as mentioned in the previous point. Ask them to offer peer-to-peer coaching to those who are having trouble or for new hires as part of their onboarding.

- **Self training**

More often than not, your vendor will provide documents, guides and some video training on how to use their platform. For the self-starters, these are more than enough to become an expert.

And that's it. Once your team is on board, you can start reaping the benefits of having a well organized work & project management platform.
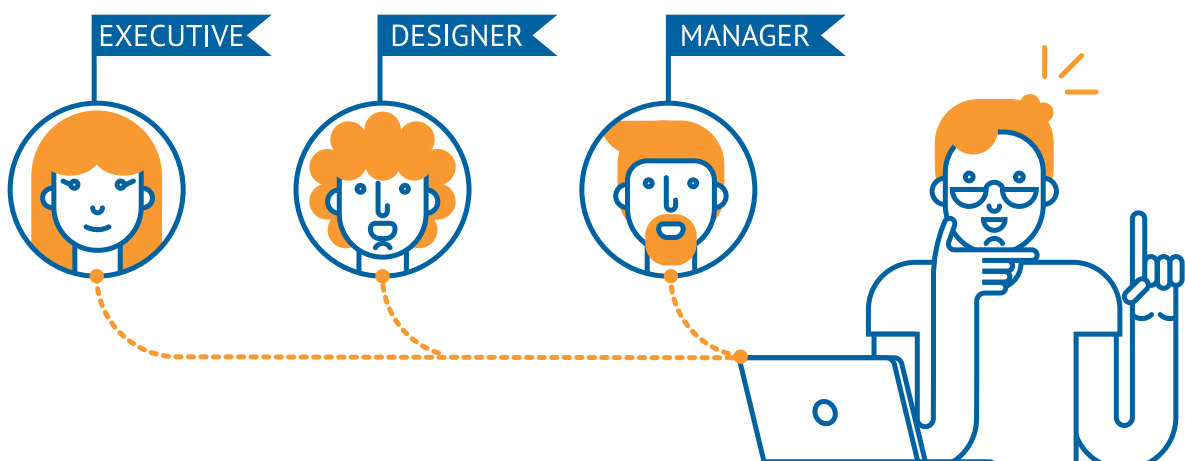
THE FUTURE OF PROJECT MANAGEMENT

Beyond Project Management

Purchase for today, purchase for tomorrow

When looking for project management software, you want to make sure that you're thinking about a few things: What do you need for today, and what do you think you will need tomorrow.

Let's unpack that.

There are probably some tools that your team is using right now. They were great in the beginning, but now they find that they need something different, or they need the tool to do something more. In essence, they have outgrown the tool. You want to choose not just a tool, but a work management platform that will scale and grow with you.

Analytics

Big data was a hot topic for many years and it still is as companies scramble to catch up on the data revolution. Big data begins with collecting information on how your team works, how efficient they are, and other data points of significance. You can't collect this data unless you have a system that allows you to do this effectively.

AI

The true value of collecting data in the long run is to be able to use it in order to understand how your team works and then automating some of their work to make everyone's lives easier. The future of work management software lies in its ability to collect data and then completely eliminate time-consuming tasks. This is of course just the beginning of the AI revolution and there is so much more to come.

Product Road Maps

Another thing to consider is the longevity of the software company that you're choosing to invest in. Will they disappear in a few years? You want to make sure that you're partnering with someone who is on solid footing and has maintained a presence in the project management community for some time. This is important for a number of obvious reasons but mainly this one: you don't want the rug pulled out from under your feet.

A SIMPLE CHECKLIST

A Brief Buyer's Checklist

1. Determine what you need
2. Make a list of features that your end-users require/have requested
3. Short-list the requested items to the most important and useful ones
4. Use software review sites like G2Crowd, Better Buys and Capterra to research vendors that meet your requirements.
5. Choose the top three and sign-up for trials and product demos
6. Speak to vendor sales teams, they will help you better understand their product
7. Narrow down to the top one or two options
8. Run a Test Pilot
9. Conduct a test pilot post mortem
10. Make your final choice
11. Get your team trained and onboard

Purchasing project management software should not be an overwhelming process. It should be comfortable and enjoyable. After all, the potential impact is huge and that's a great reason to be excited for the future.

Try Easy Projects Today!

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ALL YOUR PROJECTS ALL IN ONE PLACE

GET STARTED FOR FREE

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