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HOW TO RUN

A PROJECT MANAGEMENT SOFTWARE

PILOT

WITHIN

ENTERPRISE TEAMS

◆

9 proven steps to ensure you choose the right
project management platform for your organization

INTRODUCTION

Since 2004, the Easy Projects team has helped thousands of companies select and implement project management software in their organizations.

Over the years we've witnessed a number of successful trials and pilot projects. We interviewed pilot participants to determine and analyze which factors led to long-term success.

Our definition of success is *the complete adoption of the selected project management platform, its continuous use past the original term and the achievement of the measurable improvements on Key Performance Indicators (KPIs).*

This whitepaper highlights 9 best practices followed by our Enterprise clients during their Project Management Software trials.

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PRACTICE #1:
CHOOSE YOUR SUCCESS METRICS AND KPIS

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As the famous quote attributed to Peter Drucker says: "If you can't measure it, you can't improve it." It might sound like a common sense, but in reality it's not easy to follow. It's very tempting to say: "Well, we need to implement a project management platform because we want to be more effective". That's nice. But, in six months, how will you know if you've become more effective?

You need to decide on a few metrics or KPIs that you can measure before new project management software is implemented. Then, you will be able to compare the results at regularly scheduled health checkpoints after your go-live. We recommend checkpoints to be conducted every 4-6 months.

While each company has its own unique processes and workflows, here are some sample KPIs and metrics that you can use as a guide:

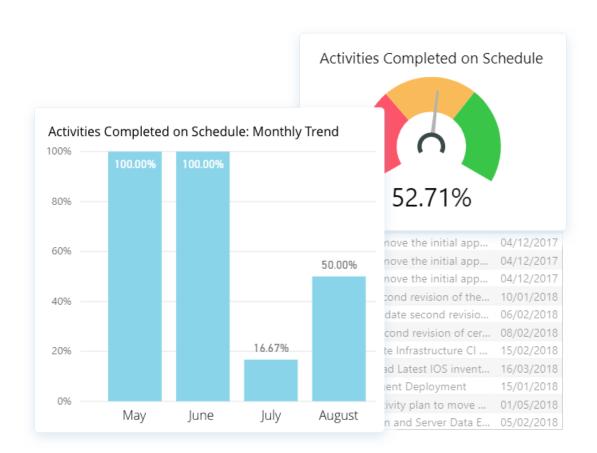1. Increase percentage of projects that complete on time;

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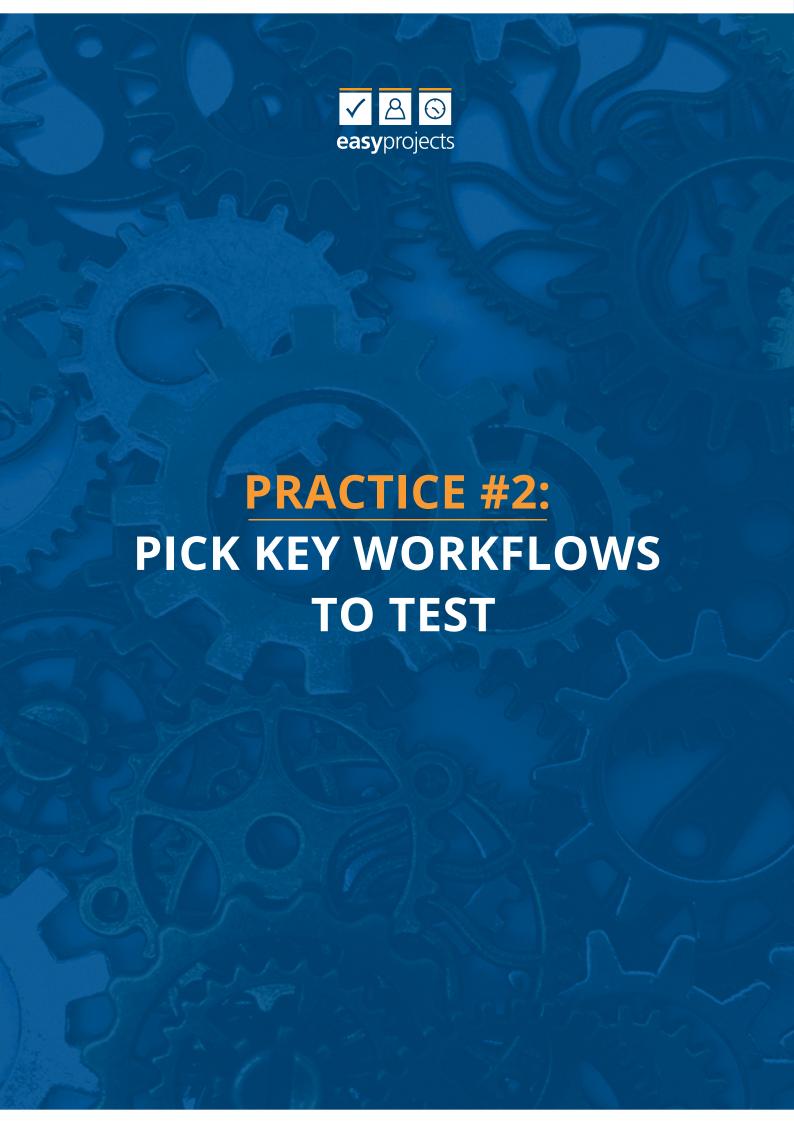
2. Decrease employee stress level[1];

3. Decrease time-to-production.

[1] Actual metric used and measured by one of Easy Projects clients

Activities Completed on Schedule

52.71%

Activities Completed on Schedule: Monthly Trend

nove the initial app...	04/12/2017
nove the initial app...	04/12/2017
nove the initial app...	04/12/2017
cond revision of the...	10/01/2018
date second revisio...	06/02/2018
cond revision of cer...	08/02/2018
te Infrastructure CI ...	15/02/2018
ad Latest IOS invent...	16/03/2018
ent Deployment	15/01/2018
tivity plan to move ...	01/05/2018
n and Server Data E...	05/02/2018

PRACTICE #2:
PICK KEY WORKFLOWS TO TEST

PICK KEY WORKFLOWS TO TEST

Due to the time-limited nature of your trial, you won't be able to test out how the project management platform handles every single permutation of your business processes. That's why it's important to decide what the key workflows are and how they will operate to support the KPIs and metrics we mentioned before. We recommend choosing 1-3 meaningful workflows or business processes for your pilot.

Another consideration while choosing the workflows is their data entry intensity. In most cases, organizations don't have the luxury of taking the Pilot team off their regular responsibilities and tasks. So the effort required to replicate the chosen workflows in the new system should be reasonable enough.

PRACTICE #3:
DECIDE ON YOUR PILOT SUCCESS CRITERIA

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Once you decide on the workflows that you'll be testing, pick your Pilot success criteria. These goals most likely will be different from the full-scale implementation metrics due to the time limits of your trial period. We recommend choosing no more than three key criteria.
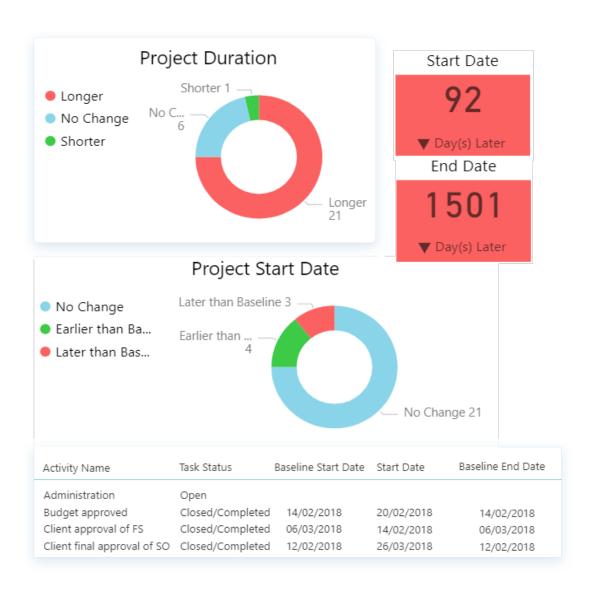
Similar to the Implementation success metrics, pilot success criteria should be easily measurable and well-defined. Here are some examples of the Pilot Success goals:

- Decrease in time required to produce weekly project reports;

- Ability to see real-time project statuses across multiple departments, teams, portfolios or LOBs;

- Decrease in time required to forecast resource availability for upcoming projects.

DECIDE ON YOUR PILOT SUCCESS CRITERIA

It is crucial to ground the evaluation process against an objective set of criteria. In its absence, there is high risk of ending up with stakeholders feedback like "all tools are nice, but i really liked that button…"

PRACTICE #4:

CHOOSE YOUR PILOT TEAM

CHOOSE YOUR PILOT TEAM

Now that you know your trial workflows and success objectives, you need to pick your pilot team. It can get tricky. The Goldilocks rule applies. The team cannot be too small. Otherwise, you'll risk getting an one-sided
evaluation not reflecting interest of all key stakeholders. The team cannot be too big because it will cause too much communication and coordination overhead.

Within an enterprise environment, we have witnessed successful trial teams ranging from 5 to 15 people.

What's the right size of the trial team? Unfortunately, there is no one-size-fits-all solution (pun intended). However there are some guidelines that might help you:

- Choose members from multiple teams to see how the evaluated platform handles cross-team collaboration;

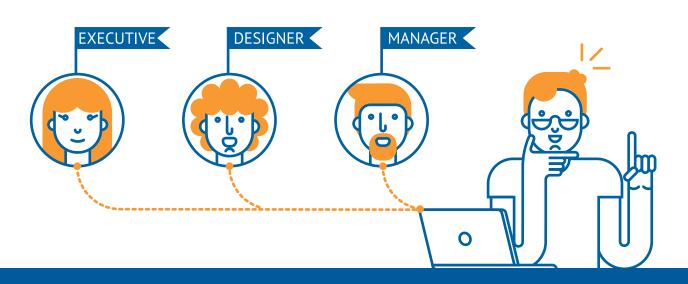- Involve team members from various functions;

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- Invite stakeholders representing 3 clear audiences:
    - Project, Functional or Resource Managers (typically in charge of process and/or resource allocation);
    - Contributors (task oriented users);
    - Executives.

It is important to discuss and set expectations for each group. What is important to them, what functionality,
experience or results they are looking for.

For example, if your executives expect to see a financial dashboard and nobody gathered and included this requirement into your pilot's scope, there is high risk of the pilot ending with no decision.

EXECUTIVE   DESIGNER   MANAGER

PRACTICE #5:

DECIDE ON THE LENGTH OF YOUR PILOT

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Again, striking the right balance of the trial duration is essential. If the trial is too short, everyone will will feel rushed and you won't have any conclusive results. If it's too long, there is the risk of your team not making it a priority. This is known as the "There is plenty of time" phenomena. On the opposite side of the spectrum, everyone can get so involved and spend so much time evaluating various tools, that your core business might be negatively affected.

Our recommended time allocation for the pilot is 1-2 hours per week per participant, including 30 minutes with the vendor per week.

While trials in small businesses can be conducted after 10-14 days, we recommend optimal trial period for the Enterprise evaluation to be in the range of 3 to 4 weeks.

PRACTICE #6:
SHORTLIST EVALUATED SOLUTIONS

Project Management is a highly saturated market. There are well over 500 products that position themselves as project, task or collaboration software. We often encounter customers who started their search from a list of 20 tools.

With the team and time investments that we discussed in Steps 4 & 5, you want to be as prudent as possible when deciding which platforms to pilot. We recommend shortening your list to the top 3, or ideally, 2 solutions.

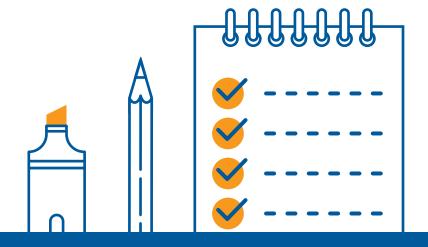Here is a quick checklist that will help you choose the right candidates:

- Meeting at least 80-90% of your functional requirements;

- Ability to continue to meet your requirements as you grow and/or evolve your processes (plan for 2-3 years ahead);

- Ability to meet your data security requirements;

- Ability to meet your data residency requirements;

- Responsiveness of the vendor on both product and technical sides;

- Clearly defined vendor's methodology for delivering successful implementations and platform adoption;

- Proof of successful roll-outs within the same industry / functional area;

- Ability to accommodate non-standard integration or customization requirements;

- Cost-benefit analysis: conduct an initial conservative return on investment (ROI) calculation[2] based on efficiency, risk mitigation or cost avoidance.

| [2] Calculate your ROI

PRACTICE #7:
TRAIN YOUR PILOT TEAM

TRAIN YOUR PILOT TEAM

All right! You shortlisted your top platforms. Now it's time to get your team trained. It's crucial that you don't leave the outcome of the evaluation to chance. You don't want a situation when someone makes a decision based on incomplete information.

This step requires some additional work from your preselected vendors. Our recommendation is to have 2-3 training sessions based on the functional requirements of various user group.

It's a good idea to incorporate a Trial Kickoff session into your training plan. It is one of the most important steps to aligning the entire team around Pilot objectives.

Also, do schedule both internal and vendor feedback checkpoints. A few open forum and Q&A sessions with the vendor can save your team hours of valuable evaluation time.

Seeing which vendor is willing to go the extra mile to deliver personalized support during your pilot will give you another evaluation point of reference.

PRACTICE #8:
CREATE EVALUATION MATRIX

CREATE EVALUATION MATRIX

Whether the final decision is going to be made by PMO, management team or based on the entire pilot team consensus, it has to be as objective as possible.

In addition to the outcome of the Pilot Success criteria, which we discussed at Step 3, we also recommend creating a shared Evaluation Matrix[3].

[3] Download Project Management Software Evaluation Chart Template

This matrix will allow each decision maker or member of the pilot team score tested platforms based on a number of functional, aesthetic, and organizational points.

Each evaluation item is can be assigned score (e.g. 1 to 10) and weight (1 to 10). Weight determines relative importance of each criteria.

Project Management Software Evaluation Chart

Instructions:
1. Assign each product a score of 1 to 10 based on the following criteria (10 being the best score)
2. Adjust criteria weight if needed (1 being the most important criteria)

Criteria	Criteria weight	Score Easy Projects	Score Product B	Score Product C
Functionality to meet current needs	1	10	10	10
Functionality to support growth needs in 2-3 years	1	10	10	10
UI / UX	1	10	10	10
Platform Security	1	10	10	10
Datacenter Reliability	1	10	10	10
Integration capabilities (API, Zapier, etc)	1	10	10	10
Reporting and Business Intelligence	1	10	10	10
Support for Integrated Dashboards (connection with other company systems)	1	10	10	10
Quality of customer support	1	10	10	10
Quality of implementation and adoption program	1	10	10	10
Cost of ownership over 3 years (1 - most expensive, 10 - least expensive)	1	10	10	10
Total Product Score:		**110**	**110**	**110**

PRACTICE #9:
ENGAGE YOUR STAKEHOLDERS EARLY

ENGAGE YOUR STAKEHOLDERS EARLY

As your pilot progresses hopefully you will see some early evidence of how the project management platform will help your organization achieve the desired improvement on your KPIs. Now, it's time to bring other stakeholders into the process to make sure you have a smooth transition from the pilot into the full-scale deployment:

- **Executive Management Team**
  We recommend that you set up an Executive Alignment call/meeting involving your shortlisted vendors and your executive sponsors as early as possible. The goal of this call is to ensure an alignment on vision, a better understanding of joint success criteria and a strong executive backing for the pilot team. Also, during your initial meeting with the Executive team, discuss the reports and dashboards they expect to see by the end of the pilot[4].

  [4] Read "How to Gain Executive Sponsorship" whitepaper

- **IT Department**
  If your internal IT is not a part of the Pilot project, engage them ASAP. There are a lot

of things they'll need to sign off on: security, authentication, deployment method, integration with other systems, etc.

- **Finances**
  Things to present: total cost of ownership (TCO) for 2-5 years, KPIs and metrics from Step 1 and projected ROI.

We hope that these nine steps of running Enterprise Pilot will help your evaluation team choose the most optimal project management platform for your organization and will make its implementation a huge success!

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ALL YOUR PROJECTS
ALL IN ONE PLACE

GET STARTED FOR FREE

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