



How to Compare Project Management Software

What to look for, what to avoid, and what questions to ask to find the right fit for your business.



ABOUT THIS eBook

Project management software can be a lifesaver, helping you avoid

problems, work more efficiently and ultimately be more productive as a team. But with dozens of different tools out there, many of which boast similar features, it can be hard to differentiate between systems and find the right solution for your business.

That's why we created this guide to help people just like you compare software and come away with the perfect solution. We've included helpful tips, things to keep in mind and questions to ask any software vendor before you make a purchase.

To get the most out of this guide, you'll need to do a little self-exploration to determine what is working for your team and where you could use a little help. Identifying your priorities, strengths and weaknesses is critical for finding a system that enhances your already established processes and team culture.

By taking time to evaluate your top contenders in detail, you can go beyond the listed software features and find a vendor that can act as a true partner empowering your team to achieve success.



PROJECT INITIATION

You can't manage projects if you can't get them started. So, finding software that meets your needs for project initiation is critical for long-term success.

Look for software that includes templates for project briefs (online forms) that capture all of the information you need to begin a project. This will eliminate rework and the need for long email chains seeking to clarify certain project details. You also want to make sure you can customize those templates to fit different project types and your own unique needs as a team.

Ask vendors how their systems go from capturing information to generating a project workflow. To maximize efficiency, look for a system that automatically populates time estimates for each task and dynamically adjusts due dates when any changes are made. This will save your team a lot of time manually adjusting small details within a project.

Above all else, think about how your team works and what your best projects looked like. How did you begin those projects and where did you go from there to achieve success? As you assess software, look for a system that mimics those same processes or a tool that is easily customizable, so you can recreate your most successful strategies in your new software.

Questions to ask:

- How does this system manage project briefs and set up workflows?
- Is there only one template for project briefs or can I customize templates based on project type?



WORKFLOW AUTOMATION

Your workflow is the backbone of your project creation process. So, any new software you purchase should create a streamlined operation to take your projects from initiation to completion as efficiently as possible.

But you also need to strike a balance between structure and flexibility. Look for software that allows you to save time by creating templates for common projects, while maintaining the flexibility

for changes and variations, as well as those occasional one-off projects. As projects evolve and due dates shift, your workflow should automatically adjust so you don't have to change everything manually. Ask vendors how dynamic their workflows are and how much space you have to customize them to fit your established processes.

While not strictly part of the workflow, you should also ask vendors about the kinds of collaboration and communication tools included in their software. A system that stores and organizes all project communications becomes a true hub for project creation. This will help foster team collaboration and makes it easier to avoid delays by keeping everything contained within a single system.

Questions to ask:

- How much can I customize workflows to match my established processes?
- What kinds of collaboration tools are included in the software?
 - Online Proofing
 - Project Portfolios
 - Notes



RESOURCE PLANNING

Managing human capital is one of the most important functions of any manager. So, you want to find software that makes this task easier, allowing you to make informed resource planning decisions that benefit your entire team.

Look for software that allows you to view team workloads and capacity in a dashboard so you can assign projects to the right person as soon as requests come in. This will help avoid overburdening employees with too much work and can increase job satisfaction for your team. A system that allows employees to track time directly in the project management software, rather than a separate system, will help you better leverage data and improve your project development process overall.

In general, you want to find software that can go beyond the simple, “Who has capacity to take on this project?” You need data visibility and tools to see the bigger picture so you can allocate resources most effectively based on your organization’s strategic goals. Consider how you currently handle these issues, and then talk to vendors about how they can support your efforts and enhance your resource planning capabilities.

Questions to ask:

- What kind of visibility does your software provide in terms of workload management and team capacity?
- Does the software include time tracking and how can it leverage that data?



REPORTING

To make effective decisions and be the best manager you can be, you need solid data. That means being able to quickly and easily access detailed reports about your operation. From the most high-level metrics to granular details, you should be able to segment data in a way that makes sense for your organization.

Make sure any system can provide reports for KPIs like:

- Total projects completed
- Project ROI
- Overdue tasks
- Time spent per task
- Workload and capacity reports

Before choosing a vendor, identify what kinds of reports are most important to you and your organization. Then find software that can generate those reports in an easily digestible (and exportable) format.

Questions to ask:

- How granular can I get with reports?
- How easy is it to view and export reports, and what format will they be in?

You should also look for software that features robust dashboards so you can access critical information at a glance. This increased visibility will help you respond to issues faster and hopefully avoid problems in the first place.



REVIEWS AND APPROVALS

When projects get delayed, the review and approval process is often to blame. Stakeholders have lots of demands on their time, and the back and forth of making edits can quickly turn into a slow and tedious process if you don't have the right tools. So, in choosing new project management software, you need a system that can avoid the bottleneck and keep projects moving towards completion.

Look for software that automatically sends reminders to stakeholders when items require their review and approval. Automatic notifications and approval tracking features can help establish a culture of accountability within your organization that can create positive change in a number of ways.

To really take your review process to the next level, consider software that allows users to compare assets side by side with version controls and make notations directly on the assets themselves. This will help avoid confusion about what edits need to be made before a project can be approved. Having this type of functionality can help your employees work smarter, not harder, allowing you to more easily move projects through your pipeline.

Questions to ask:

- How does your software handle approval tracking and can it automate reminder notifications and create a sequential review process?
- How does your software foster collaboration between team members during the project review process?
- How does your tool integrate with Adobe tools and is there a Portfolio output?



SUPPORT

Having high quality support from your software vendor goes beyond an automated help desk or a dedicated 1-800 number. It means the vendor has the tools and expertise to truly benefit your organization and enhance your use of their software tool.

The quality of support you receive impacts your speed to implementation, training for frontline employees and troubleshooting if problems with the software should arise. Ask vendors what kinds of resources they supply for user education and consider testing their support services by sending their help desk a message to see how quickly they respond.

As you search for new software, look for a vendor who is an expert not only in project management, but also in your particular field. This will help ensure that their software is tailored to your industry and will reflect the needs of teams like yours. A vendor with true expertise in your field will be able to answer detailed questions and devise solutions that improve the way you work.

Questions to ask:

- Do you specialize in one particular area, or is this just general project management software?
- How long does it typically take to implement your system and train our employees?

For a project management tool that meets all of your needs, contact RoboHead today and schedule a demo or try RoboHead's Review feature, free for 14-days.

