

ALL-IN-ONE PROJECT MANAGEMENT SOLUTION CHECKLIST



For Single and Multi Project Environments

The all-in-one tool for project management is the solution that encompasses the following capabilities:

- ✓ Planning and scheduling
- ✓ Prioritization
- ✓ Resource allocation
- ✓ Tracking project and team performance
- ✓ Uncertainty and risk management
- ✓ Bottleneck detection and mitigation
- ✓ Collaboration and reporting

An all-in-one multi-project management solution will automate most processes and operations that a project and resource managers are in charge of and will let you get rid of all additional software tools. With such a solution at hand, you'll reach your goals faster by completing multiple projects on time and within budget.

CLASSIC PM **VS** MULTI-PROJECT MANAGEMENT TOOLS

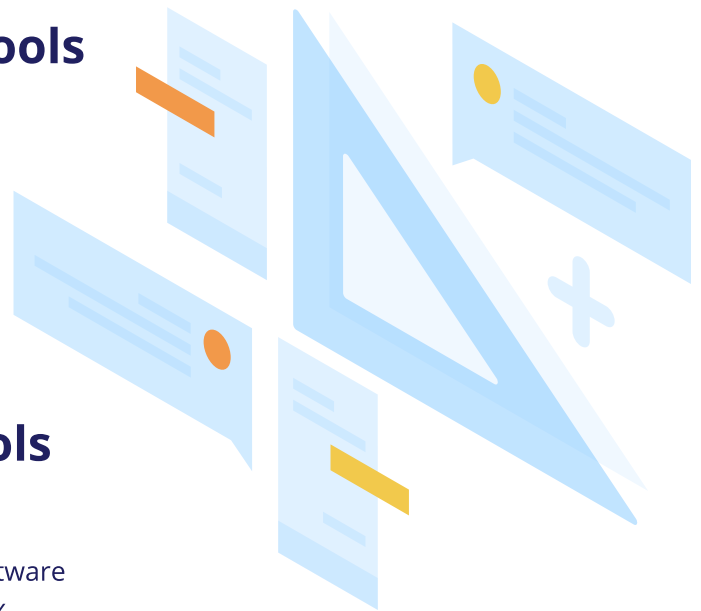
Classic Project Management Tools

Traditional tools developed for managing only one project at a time consider multiple projects in isolation just as a set of single projects without regard to their dependencies, while MPM software treats them as a system.

Multi-project management tools

The solutions developed for administering one project are primitive and don't have as many features as MPM software has. Most instruments of MPM tools are based on complex smart algorithms that provide more opportunities for efficient project and resource management.

We suggest choosing the software solution based on the criteria below.



METHODOLOGY & FUNCTIONALITY

Methodology/Approach

Any PM product must rest upon a certain methodology. Make sure the idea behind the solution is clear to you and you support the approach they apply to project and resource management.



Functionality

Features make the product unique and capable of bringing benefits to its users. We suggest considering a PM tool at the following five levels: project management level, resource management level, task management level, and performance analysis level.

Project Management Level

- A comprehensive overview of the whole project environment** with all deadlines, milestones, and dependencies.
- Dashboards** to show the projects' progress over time (e.g., against buffer time or remaining budget).
- The ability to spot projects that require maximum management attention.
- The ability to **test project decisions in a simulated environment** (features based on predictive analytics).
- Project scheduling:**

Setting up milestones and managing them (calculating project duration, etc.).

Rescheduling opportunities (in case of changes).



NB: Access to real-time data is essential to keep control of all project-related processes and timelines.

Solution: Check if a software solution you're considering has corresponding capabilities.

Functionality



Resource Management Level

Human resource management capabilities:

Resource availability management opportunities.

Resource capacity control.

Resource workload management.

Resource demand forecasting.

Competence management.

Managing individual resources.

Ability to unite individual resources into groups and manage them.

Resource performance analysis.

Resource allocation based on different attributes (availability, capacity, skills, experience).

Material resource management capabilities (tools, raw materials, facilities and equipment):

Tracking the consumption of material resources.

Controlling the amount of material resources.

Tracking the costs of material resources.

Assining material resources to tasks.

Budget management capabilities:

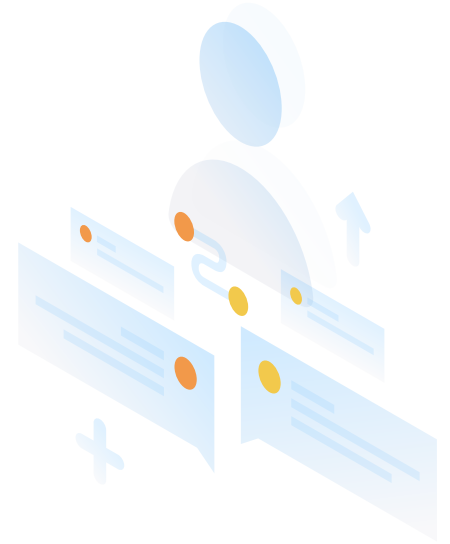
Budget planning.

Budget utilization tracking.

Budget distribution.

Baseline budget management.

Functionality



Task Management Level

- Task prioritization (making up a 'hierarchy' of tasks based on their significance for the project)
- Task allocation (assigning tasks to project team members)
- Availability of task-related information in a single place:
 - Information about the assignee,
 - Information about task's predecessors and successors,
 - Information about due dates,
 - Information about time (planned, spent, remaining),
 - Comments to tasks,
 - Information about task dependencies.
- The ability to examine completed, current, and planned tasks.

Functionality

Task Management Level

Availability of task statuses:

Urgent,

High-priority tasks,

Paused,

Postponed,

Completed,

Cancelled.

Handy task processing (simplicity of collaboration on the task):

Adding comments,

Editing task attributes,

Reporting on task completion.

All project tasks overview (the list of all tasks):

Tasks with task-related information in the list,

Task filtering opportunities,

Task ordering opportunities: manual or automatic ordering/reordering.



NB: Managing projects in isolation and prioritizing tasks randomly without considering task and resource interdependencies between projects doesn't work in multi-project management.

Solution: Prioritizing tasks across the whole multi-project environment, taking into account constraints and dependencies between projects.

Functionality

Performance Analysis

- The ability to **analyze resource performance** (e.g., analyze their output in relation to capacity).
- Tracking progress of projects and their performance (e.g., the number of projects delivered on time and with a delay).
- The ability to create **manual and automatic reports**.



NB: Insufficient data on resource performance won't let you detect bottlenecks and assess the state of the whole project environment.

Solution: Tools that visualize current and future workload, output, and capacity.

USABILITY

- ✓ User-friendly interface
- ✓ Multi-language capabilities
- ✓ Pop-up prompts



Technical support

Support types:

- Online support:** live chat, e-mail, ticket system.
- Support **over the phone.**
- Technical **webinars/training sessions.**

Mobile version

Support:

- Android
- iOS

Functionalities:

- Project management functionalities,
- Task management functionalities,
- Resource management functionalities.

User guidelines

- PDF user materials,
- Wiki base with all technical materials,
- Technical blog posts on the website.



NB: The tool should be easy to use, and the software vendor should provide high-quality support to the users.

ARCHITECTURE

Security:

Login access control,

Multi-factor authentication,

End-to-end encryption,

IP whitelist.

Integration opportunities:

Ready-made integrations,

Availability of on-demand integrations,

Integrations with other PM and RM tools,

Integrations with other solutions (e.g., with human resource management system).

Scalability:

The ability to work with the required number of users (that corresponds to your business needs),

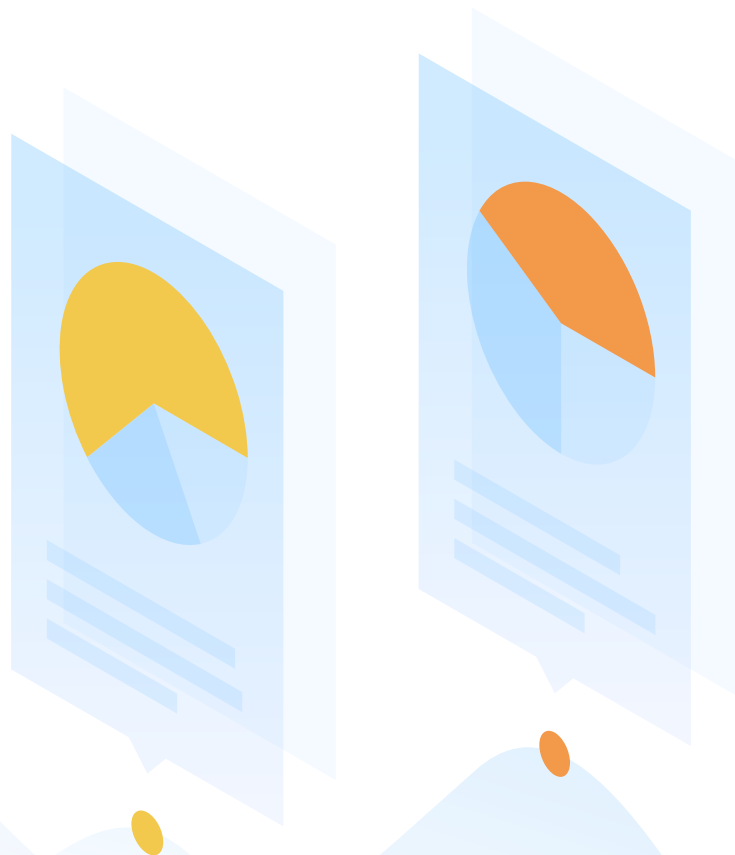
The ability to process the required number of projects (that aligns with your business needs),

The ability to process the desired number of requests (that corresponds to your business needs).

VENDOR REPUTATION & FEEDBACK

Reliable feedback

- Case studies** with an opportunity to contact the company to ask questions about the product.
- Feedback from customers on **independent platforms**.
- Awards or badges** from independent software assessment companies.



COST & TERMS OF USE

Licence conditions

Access options:

Access for a single device,

Access for multiple devices.

Diversity of payment options

Time:

One-time fee,

Subscription-based pricing (monthly/semi-annual/annual).

Users:

Per-user payment,

The whole team payment.

Features:

Per-user payment,

Payments for the whole set of features.

BONUS

SOFTWARE SOLUTION SELECTION CHECKLIST

Define your **business goals**.



Examine the category of the solution by reading pieces of research, blog posts, etc. (not about the certain product but the category, for example, 'multi-project management software solution').



Examine the **market of vendors** who develop these solutions.



Apply the criteria suggested in this paper to overview all essential characteristics of the ideal software.



Make up a **list of products** that comply with the criteria.



Select the top 5 products and make appointments with their representatives (ask for a call/personal meeting/webinar/demo). Don't forget to make up a list of questions you may want to ask a company representative.



Engage partners and colleagues to compare the tools and **discuss every detail together**.



Make a final decision and **reach your business goals**.



Ready to boost your project management?

[Book a Live Demo](#)