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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
- Constraint detection
- Collaboration and reporting

An all-in-one MPM 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 programs. With such a solution in hand, you'll reach your goals faster and safely by completing multiple projects on time and within budget.

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CLASSIC PM VS MULTI-PROJECT MANAGEMENT TOOLS

Classic Project Management

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. Before you start your search journey, familiarize yourself with them and before making the final choice, just check off the points that your solution has to be sure it's the best one.**

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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 adhere to 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

- [ ] **Real-time data accessibility** to see project workflow with deadlines, milestones, and task statuses: pipeline, gantt charts, kanban/scrum boards, or dashboard.
- [ ] **Fever chart** to show the projects' progress over time against buffer time and project constraints.
- [ ] The ability to **forecast project flow up** to a certain date in the future.
- [ ] The ability to **test project decisions in a simulated environment** (features based on predictive analytics).

NB: No access to real-time data results in project failure because it's essential to detect a constraint early on before it becomes a real danger.

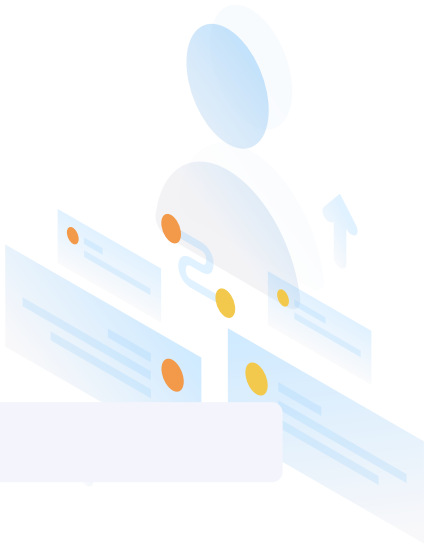
Solution: Features that display project flow with all related data.

Functionality

Resource Management Level

- [ ] **Human resource management facilities:**
  - Resource availability management opportunities.
  - Resource capacity control.
  - Resource workload management opportunities.
  - Resource demand control.
  - Ability to manage individual resources.
  - Ability to unite individual resources into groups and manage them.
  - Ability to allocate resources based on different attributes (availability, capacity, skills, experience).
- [ ] **Material resource management facilities (tools, raw materials, and equipment):**
  - Tracking the consumption of material resources.
  - Controlling the amount of material resources.
  - Tracking the costs of material resources.
  - Monitoring the “work” of material resources (e.g. WOC).
- [ ] **Budget management facilities:**
  - Budget planning,
  - Budget utilization tracking,
  - Budget allocation opportunities,
  - Baseline budget management.

Functionality



Task Management Level

- [ ] **Task prioritization (making up a 'hierarchy' of tasks based on their significance for the project):**
  - Manual,
  - Automatic.
- [ ] **Task allocation (assigning tasks to project team members):**
  - Manual,
  - Automatic.
- [ ] **Project scheduling:**
  - Setting up milestones and managing them (calculating project duration, etc.).
  - Rescheduling opportunities (in case of changes).
- [ ] **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 in terms of 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: A traditional approach to address projects in isolation and solve tasks randomly without considering task and resource interdependencies between projects, which is used when managing a single project, doesn't work here.

Solution: Automatic task prioritization and resource allocation based on lessons learned analysis and real-time data with regard to the dependencies between all projects.

Functionality

Performance Analysis

- [ ] Availability of **historical information** about resources' load and project-related data from the past.
- [ ] The ability to **track** human resources' **current progress**.
- [ ] The ability to **forecast resource load** based on real-time and historical data.
- [ ] The ability to make **manual and automatic reports**.

NB: Insufficient Information About Team Progress Results Either in Resource Overload or Underload.

Solution: Instruments for Tracking and Analyzing Previous, Current, and Future Load and Performance.

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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: Besides the features, the tool must be easy to use and the company producing it 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 (non-PM and RM tools).

- [ ] **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).

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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.

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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