Checklist

for Choosing a Suitable Project Management Software

Planning Functions

What do you want to plan? Decide what you will use the software for: project management, task management, scheduling, resource management, cost management, risk and opportunity management, workflow management, etc.

Planning Elements

Which type of elements are to be planned? For example: tasks, ideas, projects, programs, portfolios.

Management Approach

What planning approaches and PM standards are to be supported by the software? Be clear about what methods and standards you want to use: Agile PM with Scrum and Kanban, Cascade with Gantt chart and milestones, hybrid approaches; standards like DIN, PMI, IPMA, Prince 2, Hermes, etc.

Communication

What communication features do you need? Do you need support for dispersed teams? Collaboration features that make e-mails superfluous are helpful, e.g. notifications, activity tracking, chats, meeting functions.

Controlling and Admin Functions

Which functions for analysis and administration do you need? How comprehensive do you want them to be? Popular functions are: Reports, key figures, controlling, progress monitoring, time recording, rights management, change management, etc.

Interfaces

Do you need interfaces to other systems and specific data formats for import and export? Connecting your PM system to existing ERP, time recording, or PM tools can make sense.

Adaptability

To what extent do you want the software to adaptable to your company's requirements? To what extent do you want the software to be scalable?

Data Security and GDPR Conformity

What requirements does the company set for data security and data protection?

License and Operational Model

Which price and license models are possible? SaaS or on-premises? Which operating system is to be supported? Do you want to be able to use it in a mobile fashion?

Budget Frame

What is your budget? Make sure that you include possible follow-up costs such as adjustments and maintenance in your budget calculation.

Implementation and Service

Which service offers do you need and how much time do you allow for their introduction? Do you prefer a rapid standard implementation or do you want the software to be adapted precisely to your own processes. How extensve do you want to benefit from support and training offers.

Find Out Whether the PLANTA Software Meets Your Checklist

PLANTA Projektmanagement-Systeme GmbH
Bunsenstraße 14, 76135 Karlsruhe
+49 721 8281111 · kontakt@planta.de
www.planta.de

Make a non-binding appointment