

Selection of PM Software

Checklist

☐ Planning Scope

What should the software cover?

- ☐ project management, task management and scheduling
- ☐ Resource management, cost management, and risk and opportunity management
- ☐ workflow management, ideas, programs, and 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 (Scrum und Kanban)
- ☐ traditional PM (Cascade with Gantt charts and milestone)
- ☐ hybrid PM (combining the advantages of traditional and agile PM)

☐ Communication

What communication features do you need? Do you need support for dispersed teams?
Collaboration features that make e-mails superfluous are helpful

- ☐ notifications
- ☐ activity tracking
- ☐ chats & meeting functions

☐ Controlling & Admin Functions

Which functions for analysis and administration do you need?
How comprehensive do you want them to be?

- ☐ Reports, key figures, controlling and progress monitoring
- ☐ time recording, rights management and change management

☐ Integration & Adaptability

How well must the software integrate into the existing IT and process landscape?

- ☐ Interfaces to **ERP, time recording, or PM tools** and suitable import/export formats
- ☐ Adaptability to company requirements and sufficient scalability

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☐ License & 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?

☐ Data Security & GDPR Conformity

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

- ☐ Data keeping in accordance with GDPR and BDSG, full compliance with the EU GDPR
- ☐ Server locations in Germany and Europe (certified at the highest technological standards)
- ☐ Data encryption during transfer and in storage
- ☐ Cloud security with ISO 27001 and 27018 certification

☐ Budget Frame

What budget is available?

- ☐ suitable pricing and licensing model
- ☐ include follow-up costs for implementation, adaptations, and maintenance

☐ Implementation & Service

How should the software be implemented and supported long?

- ☐ rapid standard implementation or precise adaptation to your own processes
- ☐ define timeframe, service, support, and training requirements

Any questions?

We will be happy to provide further advice:

[Contact us](#)