

PROJECT MANAGEMENT SOFTWARE RESEARCH COMPARISON CHART

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HOW TO USE THIS TEMPLATE

Organize your project management software research notes using this chart. During your research, consider the questions in the left column and note what each option offers. Use these notes to compare project management software offerings and choose what is right for your team.

RESEARCH COMPLETED BY:

DATE:

PM SOFTWARE OPTIONS

	PM SOFTWARE OPTIONS		
Does this company provide initial training and support?			
Does it provide training for new version releases?			
Does it provide live chat or phone support?			
During what hours is live support available?			

PM SOFTWARE OPTIONS

PM SOFTWARE OPTIONS			
Does this product provide flexible project management tools?			
Can you view project information in the following formats? (See below)			
Gantt chart			
calendar			
spreadsheet			
dashboard			
Can you track the amount of time that employees spend on tasks?			
Can you create timelines and set deadlines for tasks?			
Can you easily change these timelines and deadlines?			
Can you use dashboards to post project-related messages to others?			

PM SOFTWARE OPTIONS

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Does this product provide in-depth reporting?			
Can you create charts and graphs?			
Can you display project status in real time?			
Are changes automatically updated for everyone?			
Can you display information from multiple projects in one place?			

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Can this program automate tasks?			
Can we set up automatic notifications?			
Can we set them up to remind people about deadlines?			
Can we set them up to alert people about a task's completion?			
Can we set them up to alert people about the updating of a document?			
Can we automate more complicated workflows?			
Can we automate approval requests?			
Can we automate the assignment of tasks?			
Can we move or share information between documents?			

PM SOFTWARE OPTIONS

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How much does this product cost?			
Is there a monthly cost per user?			
Is there a minimum number of users?			
Is there a maximum number of users?			
Is there a free tier or free trial?			
How long does the free trial last?			
Does the free tier/trial limit the functionality of the product?			

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Does this product keep my data secure?			
Does the product store our data locally or on a server?			
Does the product encrypt our sensitive data?			
Is there a data storage maximum?			

PM SOFTWARE OPTIONS

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<p>Does this product allow tiered access based on the role of the user?</p>			
<p>Can we share information with non-users?</p>			
<p>Can we share project information outside our organization?</p>			
<p>Who can create documents?</p>			
<p>Who can edit them?</p>			
<p>Can you share some project information without sharing all of it?</p>			

PM SOFTWARE OPTIONS

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Does this product integrate well with the following apps? (See below)			
file storage apps like Dropbox, Google Drive, and Evernote			
communication apps like Slack, Microsoft Teams, and Gmail			
data management apps like QuickBooks, Oracle, and Microsoft Excel			
asset managers, directories, and sales software			
Is this product mobile compatible?			
Can you access this product through a browser?			
Does the product have a dedicated app?			
Does the app have full functionality?			

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