



Project Management Technology Unpacked

A quick hit guide to understanding the when, what, why, and how to acquire, integrate, and maintain project management technology - along with what not to do.

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Why and when to invest in PM technology

Investing in structured project management technology is a big decision. It can provide several benefits to your organization, such as improved project planning, better resource allocation, more efficient communication, and more effective tracking of project progress. However, because it is a big decision to invest in such technology, careful analysis of the potential costs and benefits must be considered.

Here are some factors to consider when deciding whether to invest in structured project management technology:

1. **Size and complexity of projects:** If your organization manages small and simple projects, it may not be necessary to invest in sophisticated PMO/PM technology. However, as the size and complexity of your projects increase, the need for more advanced tools and software often becomes mandatory.
2. **Project timelines:** If your organization has tight project deadlines with a lot of dependencies, investing in project management technology will help ensure that tasks are completed on time, in the right order, and within budget. By providing real-time updates on project progress, project management software will help identify potential conflicts, roadblocks, and delays early on.
3. **Resource availability:** If limited resources are an issue (which they usually are), investing in project management technology will help optimize the allocation of those resources. By providing a centralized platform for gauging competing projects, managing tasks, and analyzing resource demands, project management software will help ensure that resources are used efficiently and effectively.
4. **Communication needs:** Does your organization manage remote teams or stakeholders? If so, investing in project management technology will help facilitate communication and collaboration. By providing a centralized platform for sharing project updates, reports, and documents, project management software will help ensure that all stakeholders are consistently on the same page.
5. **Long-term goals:** If your organization has ambitious long-term goals, investing in project management technology will help ensure that those goals are attainable. By providing a structured framework for managing projects, project management software will help align project goals with the overall strategic direction of the organization.

Reasons for investing in PM technology

Investing in and implementing project management technology has the potential to bring numerous benefits to your organization. Here are seven of the most compelling reasons:

1. **Increased productivity:** PM technology automates and streamlines most project management tasks, such as scheduling, task assignment, risk and issue management, stakeholder and communications management, progress tracking, and lessons learned. This will invariably save time and increase productivity by reducing manual work and eliminating errors.
2. **Improved collaboration:** PM technology allows your project team members to collaborate more effectively, share information, and communicate in real-time. This will help to improve teamwork, increase accountability, and foster better relationships between team members - not to mention all other stakeholders.
3. **Better resource management:** PM technology helps organizations manage their resources more effectively, by providing visibility into resource availability, workloads, conflicts, and utilization. In turn, this drives optimized resource allocation and reduces the risk of overburdening team members.
4. **Greater transparency:** PM technology provides visibility into project progress, status, issues, risks, and spend. This helps businesses to identify issues early, make informed decisions, and keep stakeholders informed.
5. **Enhanced risk management:** PM technology helps organizations identify, track, and mitigate risks more effectively. This drives reduced risk of project failure, improve project outcomes, and increase stakeholder confidence.
6. **Better decision-making:** PM technology provides businesses with data-driven insights and real-time information to support decision-making. This will lead organizations to make more informed decisions, based on accurate and up-to-date information.
7. **Increased profitability:** PM technology drives your organization to complete projects more efficiently, reduce costs, and deliver projects on time and within budget. This almost always converts to increased profitability, improved customer satisfaction, and enhances the reputation of the organization.

PM technology suggestions by function

Organizations should evaluate their unique project management requirements and choose the appropriate technology that aligns with their vision, objectives, and goals. Here's a comprehensive list of the primary types of project management technologies that organizations should consider:

1. **Project Management Software:** These platforms provide a comprehensive suite of tools to manage tasks, schedules, budgets, and resources. Popular examples include: **Trello, Asana, and Basecamp.**
2. **Collaboration and Communication Tools:** These tools facilitate team collaboration, communication, and file sharing. Examples include: **Slack, Microsoft Teams, and Google Workspace.**
3. **Time Tracking Software:** These platforms track and manage employee time, including billable hours, project hours, and time-off requests. Examples include: **Toggl, Harvest, and Clockify.**
4. **Resource Management Tools:** These platforms help manage project resources, including personnel, equipment, and materials. Examples include: **Resource Guru, Float, and Ganttlic.**
5. **Budget and Expense Management Software:** These platforms help manage project budgets and expenses, including tracking expenses and generating reports. Examples include: **QuickBooks, FreshBooks, and Xero.**
6. **Risk Management Tools:** These platforms help identify, assess, and manage project risks, including mitigating strategies. Examples include: **Risk Matrix, RiskyProject, and Active Risk Manager.**
7. **Project Portfolio Management (PPM) Software:** These platforms help manage multiple projects and align them with organizational goals. Examples include: **Planview, Clarizen, and Mavenlink.**
8. **Agile Project Management Tools:** These platforms enable agile project management methodologies, including Kanban and Scrum. Examples include: **Jira, Agilean, and Targetprocess.**
9. **Industry-Specific Project Management Platforms:** These platforms cater to specific industries and their unique project management needs. Examples include: **Wrike for marketing, Deltek for construction, and SAP for enterprise resource planning.**

PM technology suggestions by methodologies/process

There are a variety of project management tools available to support various project management best practices. Here are some examples:

1. **Agile Project Management:** For agile project management, popular tools include **JIRA, Trello, Asana, and Monday.com**. These tools support agile methodologies such as Scrum, Kanban, and Lean, allowing teams to plan and track sprints, manage backlogs, and visualize work in progress.
2. **Waterfall Project Management:** For traditional, waterfall project management, tools such as **Microsoft Project, Smartsheet, and TeamGantt** are popular choices. These tools provide features such as Gantt charts, critical path analysis, and resource management, allowing teams to plan and track projects in a linear fashion.
3. **Risk Management:** For risk management, tools such as **RiskyProject, Palisade DecisionTools, and Active Risk Manager** are widely used. These tools allow teams to identify, assess, and mitigate risks throughout the project lifecycle.
4. **Resource Management:** For resource management, tools such as Resource **Guru, Float, and 10,000ft** are popular choices. These tools provide features such as resource scheduling, capacity planning, and time tracking, allowing teams to optimize resource utilization and manage workload.
5. **Collaboration and Communication:** For collaboration and communication, tools such as **Slack, Microsoft Teams, and Google Workspace** are widely used. These tools provide features such as instant messaging, video conferencing, file sharing, and project management integrations, allowing teams to communicate and collaborate effectively.
6. **Portfolio Management:** For portfolio management, tools such as **Planview, Clarizen, and CA PPM** are popular choices. These tools allow organizations to manage multiple projects and programs, prioritize investments, and allocate resources effectively.

It's important to note that the best project management tool for any given project or organization depends on a variety of factors, including project size, complexity, team size, budget, and available resources. It's also important to evaluate multiple options and choose the one that best meets the needs of your project or program. The first one you see is likely not the best choice

PMO technology suggestions and summaries

The list of PMO technology software is long. New tools are being introduced monthly, but it's critical that you ensure whatever investment you do make are backed by companies that will be around for the long-haul. The last thing you need is to invest in a new toolset and have that company go under a year later. To avoid this type of risk, we suggest that you look at mainstream tools that have a large user base and longevity in the market. Here are six of the most popular tools for managing PMO's today:

1. **ProjectManager:** A very solid, structured, and holistic PMO platform to support most of the project management functions you will ever need. ProjectManager is an award-winning cloud-based platform, with tools for project planning, workflow management, issue and risk management, resource management, and time tracking across the entire work lifecycle.
2. **Asana:** Asana is a popular project management tool that allows teams to collaborate on projects and track progress. It offers features such as task management, team collaboration, and reporting.
3. **Trello:** Trello is a visual project management tool that allows teams to organize and prioritize their work using boards, lists, and cards. It is widely used for agile project management, as well as for managing personal tasks and projects.
4. **JIRA:** JIRA is a project management tool that is widely used for software development projects. It offers features for agile project management, issue tracking, and team collaboration.
5. **Wrike:** Wrike is a project management tool that offers features for project planning, task management, team collaboration, and reporting. It is widely used by small and medium-sized businesses to manage their project portfolios.
6. **Basecamp:** Basecamp is a project management tool that offers features for task management, team collaboration, and reporting. It is widely used by small and medium-sized businesses to manage their projects and teams.

It's important to note that the popularity of PMO technologies can vary depending on the industry, the size of your organization, and the specific needs of the project or program. It's also important to evaluate multiple options and choose the one that best meets the needs of your organization.

Typical snags with PM technology integrations

Although PM technology can bring a myriad of benefits to your organization, there are also a number of potential snags that organizations experience with the acquisition and integration of these types of investments. Here are the seven most common issues:

1. **Lack of user adoption:** One of the biggest problems with new PM technology is non-adoption by users. This can be due to a lack of training, poor user experience, or resistance to change.
2. **Integration issues:** Integrating new PM technology with existing systems and processes is challenging. It often requires additional IT resources and expertise to ensure that the new technology works seamlessly with existing systems.
3. **Cost:** Acquiring and implementing new PM technology can be expensive. The cost of licensing, training, and implementing the new technology may exceed the budget of the organization.
4. **Technical difficulties:** New PM technology is often prone to technical difficulties and bugs, especially during the initial stages of implementation. This can result in downtime and lost productivity.
5. **Security and privacy concerns:** New PM technology may raise security and privacy concerns, especially if it involves sharing sensitive information or data. It is important to ensure that the new technology complies with the security and privacy regulations associated with your industry.
6. **Compatibility issues:** New PM technology may not be compatible with your existing hardware or software, which can create technical challenges and increase costs.
7. **Lack of customization:** New PM technology may not offer the level of customization that the organization requires. This can limit its usefulness and effectiveness.

Methods to avoid the snags with PM tech integrations

Acquiring and integrating new project management technology can be challenging, but there are several things your organization can do to avoid issues and problems. Here are some examples:

1. **Conduct a thorough needs assessment:** Before investing in new project management technology, it's important to assess your organization's needs and requirements. This will help ensure that the technology meets your organization's specific needs and goals.
2. **Involve key stakeholders:** Involve your key stakeholders in the decision-making process when selecting and implementing new project management technology. This can help establish buy-in from all parties and increase the likelihood of successful adoption.
3. **Plan for implementation:** Developing a comprehensive plan for implementation will ensure a smooth transition and avoid potential issues. This should include timelines, budgets, resource allocation, and contingency plans.
4. **Test the technology:** Testing the new technology in a controlled environment will help identify potential issues and allow for adjustments to be made before full implementation.
5. **Provide adequate training:** Providing adequate training to users will increase user adoption and minimize resistance to change. This should include training on the new technology, as well as any changes to your associated processes and procedures.
6. **Consider compatibility:** Ensure that the new project management technology is compatible with existing hardware and software. This will help you avoid technical issues and reduce implementation costs.
7. **Address security and privacy concerns:** Address security and privacy concerns early in the process to ensure that the new technology complies with regulations and meets your organization's security and privacy requirements.
8. **Monitor and evaluate:** Monitor and evaluate the implementation of the new technology to identify any issues or areas for improvement. This will help ensure that the technology is delivering the expected benefits and that it is aligned with your organization's goals.

Tips for skipping industry standard PM/PMO Technology

Word Processing:

- Use templates for project plans, status reports, meeting minutes, and other project-related documents to save time and ensure consistency.
- Use track changes and comments to collaborate with team members and stakeholders on documents and keep track of feedback and revisions.
- Use headers, footers, and page numbers to make it easier to navigate longer documents.
- Use tables of contents and appendices to organize information and make it easier to find.

Spreadsheets:

- Use spreadsheets for budgeting, resource allocation, and tracking project tasks and milestones.
- Use conditional formatting to highlight important information, such as overdue tasks or budget variances.
- Use data validation to prevent data entry errors and ensure consistency.
- Use pivot tables and charts to analyze and visualize data and communicate insights to stakeholders.

Calendaring:

- Use a shared calendar to schedule meetings and appointments with team members and stakeholders.
- Use reminders and notifications to ensure that meetings are attended and deadlines are met.
- Use color-coding and labels to differentiate between different types of events, such as team meetings, stakeholder meetings, and project milestones.
- Use recurring events to schedule regular meetings, such as weekly status updates or monthly check-ins.

Shared drives:

- Use a shared drive to store project-related documents and resources, such as project plans, requirements, and design documents.
- Use folder structures and naming conventions to organize information and make it easier to find.
- Use version control to keep track of changes to documents and ensure that everyone is working with the latest version.
- Use access controls to restrict access to sensitive information and ensure that only authorized personnel can view or edit certain documents.

Slide decks:

- Use slide decks to communicate project status, plans, and updates to stakeholders.
- Use slide templates to ensure consistency in design and formatting.
- Use charts, diagrams, and images to make information more engaging and easier to understand.
- Use speaker notes to provide additional context and guidance for presenters.

Email:

- Use email to communicate with team members and stakeholders, particularly for informal or ad-hoc communications.
- Use email templates for common types of messages, such as meeting invitations or project updates, to save time and ensure consistency.
- Use email folders and filters to organize messages and make it easier to find important information.
- Use email signatures to provide contact information and other relevant details.