Enterprise Project Manager Software Checklist

☐ **AI Enablement**
Software-enabled AI systems perform day-to-day administration and project management, such as chatbots that simulate human conversation. With AI, you can automate simple tasks, and the system will develop an understanding of essential project performance. AI tools can help the team to uncover insights, perform more complex tasks, and make recommendations and decisions.

☐ **API Integration**
To maintain the tools and apps your team is already using for tasks like scheduling, messaging, or customer management, look for project management software with a robust API to seamlessly connect to the apps your team loves.

☐ **Automated Workflows**
Work tasks are automatically triggered and routed between people, technology, and data to free teams for other tasks and collaboration.

☐ **Communication and Collaboration**
Streamlined communication is growing as a critical need with the increase of remote work or employees' geographical distribution across disparate offices. A built-in messaging app helps team members quickly communicate and collaborate with centralized online workspaces where you can store and share activity streams, files, and project calendars.

☐ **Customization**

Customization enables you to create a work environment that reflects your culture, including logo, color scheme, and custom exports, as well as how you prefer to organize your data. Customize reports and data columns to display information that enable you to easily show relevant data and metrics to different stakeholders quickly.

☐ **Dashboards**

Use a team dashboard to get a high-level view of project statuses to keep everyone updated on projects' position with graphs, charts, visual metrics, and key performance indicators (KPIs).

☐ **Demand Management**

Demand management organizes workflows and capacity when there are changes needed to meet supply chain, manufacturing, or marketing shifts to meet demand. Evaluate and address impending needs, including new product features, technical changes, operational constraints, and other information in current, upcoming, and unplanned projects in a portfolio.

☐ **Deployment**

Select on-premise or cloud options based on security, price, and other organization-specific constraints. While enterprise-grade solutions were historically on-premise, the advancements in software security have made large enterprises prefer cloud-based software, due to the seamlessness of setup and software upgrades.

☐ **Ease of Use**

Choose software that offers an intuitive interface that makes sense for the way your team works and reduces downtime. The more complex the tool, the less likely it will be used to its total capacity.

☐ **Issue Tracking**
Issues around missing tasks or quality assurance can be found, identified, and quickly fixed before they become major problems.

☐ **Mobile App**
The ability to work remotely keeps projects, programs, and portfolios on track without interruptions.

☐ **Project Planning & Management**
Use built-in templates to plan projects through timelines and task schedules. Keep track of project progress and upcoming milestones using reports such as burndown charts.

☐ **Project Portfolio and Program Management**
Track and handle projects from initial concept to final delivery. Compare initiatives using risk-return profiles, enabling projects within a portfolio to align with strategic goals and bring in business value.

☐ **Real-time Reporting**
Some software provides invoice automation, customer relationship management (CRM), and other functionalities to sync customer interactions and information automatically and control errors.

☐ **Resource Capacity and Planning**
Determine employee skill levels and earmark resources across projects, depending on skill sets and availability. Implement resource capacity planning and ensure that you staff high-priority projects first.

☐ **Risk Management**
Identify risks, assign them to staff to evaluate and monitor, and create plans for risk management. Establish protocols to deal with potential change requests and the possibility of issues coming up during project execution.

☐ **Scheduling & Planning**
Creation of efficient timelines, workflows, and dependencies are far easier with this feature.

☐ **Security and User Management**
Investigate flexible security options, including data encryption and user management features for handling user permissions and setting up single sign-on (SSO).

☐ **Task Management**
Determine tasks and team member assignments, and make sure to clarify responsibilities. Organize tasks in an intuitive manner, and consider a tool that allows you to set reminders for upcoming deadlines.

☐ **Time, Budget, and Resource Tracking**
These three aspects often overlap, and when you use them together, they can inform each other to help you distribute your team and resources more efficiently.

☐ **Visualization Tools**
Gantt charts and other visualization tools simplify data communication and metrics to handle complex data and reporting. Hence, the team stays informed, and managers can stay on top of their projects.