



Project

**Project Management
Software**

Buyer's Guide



Intelligent project management is the secret sauce of productivity and efficiency for every organization.

In fact, statistics indicate that:



498 hrs

(20.7 days) annually

are saved by the average employee using project management software.



80%

of employees spend half of the workweek redoing poorly delivered tasks due to communication issues.



50%

of teams equipped with project management software deliver tasks faster than those without.

If there's anything that data tells us, it's that software is the secret sauce to success in project management.

And you're at that stage where you're convinced about that and you're looking to dive in and invest in a project management software tool.

Having a thousand-and-one project management tools with each promising to transform your project management doesn't make it any easier.

But here's our promise:

This eBook will serve as your comprehensive guide to understanding:

- ✓ Exactly what you need
- ✓ [How project management will complete your organization's productivity & efficiency puzzle](#)
- ✓ Which features to look out for when choosing a project management tool
- ✓ The ideal project management tool for your needs

You'll learn all you need to know to help you make an informed and productive decision.

But, wait, you say. I already have a couple of spreadsheets where I create tasks, assign them to my team, and trigger alerts in Slack.

Maybe some combination of Google Sheets + Trello + Asana + Airtable, etc.

Doesn't that cut it, you ask?

Not at all. Now, to start with,

Task management is **NOT** project management

no matter how similar they look (more on that later).

Instead of stringing together a dozen tools that were never built to integrate, how about switching to a tool designed with your needs in mind?

You get to manage all your work in one place and eliminate [project burnout](#).

Here's why that matters.

According to Visual Planning,

95% of companies that deliver projects on time & under budget attribute it to the project management tool they use.

Long short story:

If you need to hit targets faster and more efficiently, you need to quit hacking tools together or second-guessing. You need one software tool that just works. That's what this guide will help you get right.

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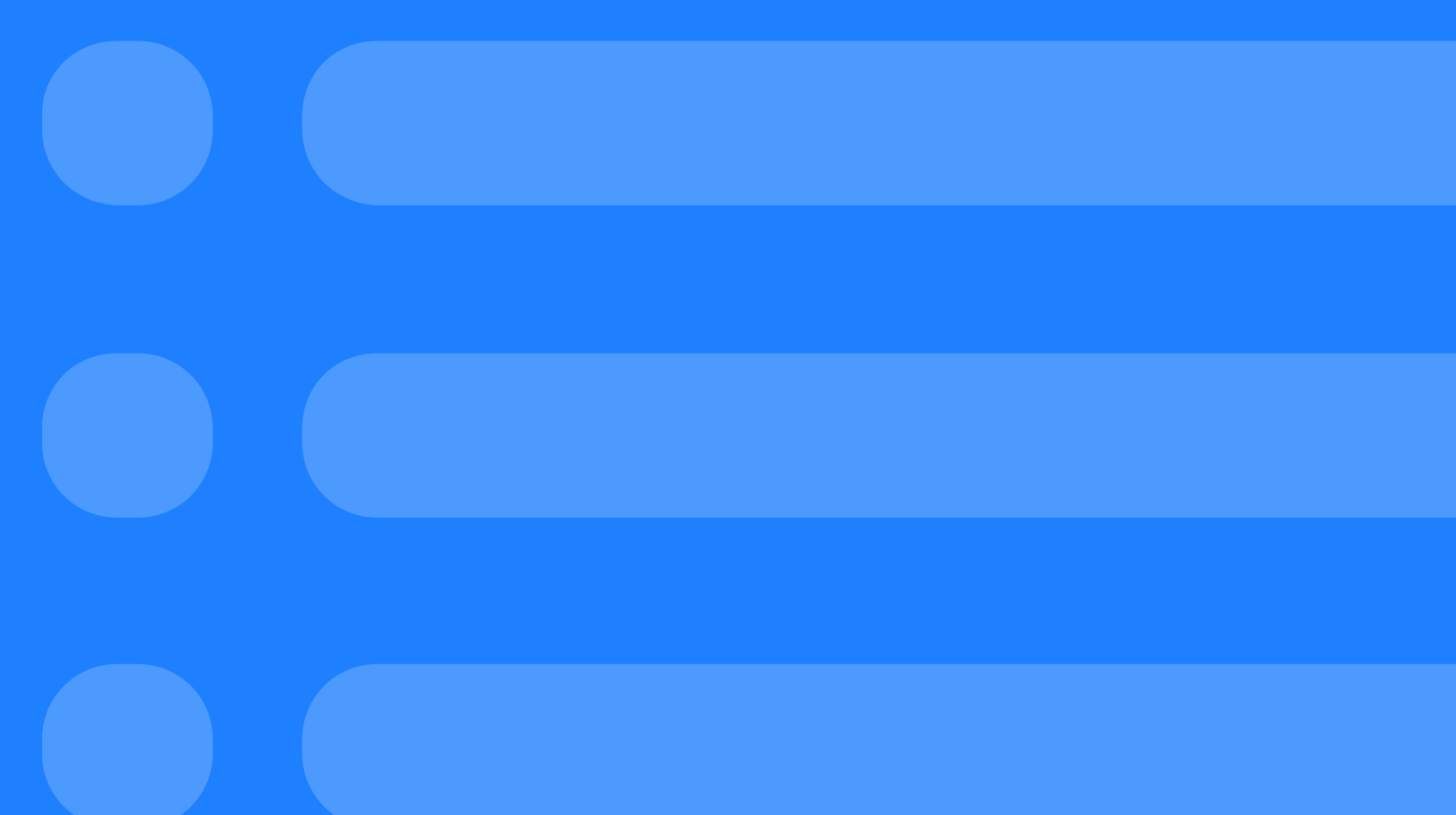
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Challenges of choosing project management software

Now, choosing a project management tool can be demanding and confusing even—if you don't have a blueprint to follow (which is why we wrote this eBook!).

Given the fact that project management will hold the center stage in your organization, it can be a delicate field to navigate, especially if you lack experience.



Some of the challenges that may be bugging you

Too many options on the market

Statistics indicate that the project management industry is estimated to grow to a whopping \$6.6 trillion value. If you guessed, a significant number of startups are looking to own a good chunk of that figure.

That's why it seems like there's a new task and project management tool launching on Product Hunt every week.

The PM software market is blowing up, giving users a lot of alternatives and forcing legacy players to get better.

Now, this constitutes an entire issue in itself. With several project management tools on the market and a wide range of very identical tools you could choose from, which one do you choose?

Decision fatigue quickly sets in when you're already testing out a handful and you start getting ads (thanks Google!) for even better-looking options for you to try out. With virtually infinite options to choose from, picking a project management tool can be very demanding —especially without a guidebook.

Unnecessarily complicated features of tools

Whenever you're buying software, or just about any tool out there, you're always faced with a dilemma either to buy pricey, advanced software that offers features you don't really need or to opt for cheaper, underpowered options that may struggle even with an average workload.

The ideal is to opt for a solution that does just what you need it for, preferably in a way that suits your existing workflows and processes. So, the trick is to first understand exactly what you need before you take a single step toward acquiring anything.

But here's where many organizations and project managers miss it big time. They jump right into shopping without having [a detailed breakdown of what they need to be looking out](#) for in the first place.

As a result, the entire organization gets stuck with either a complicated tool everyone dreads using or an underpowered kit that needs several other apps integrated to get it to even work.

In this eBook, we've added a comprehensive guide to defining your need and buying software that meets it so you don't get lost in the buying process.



Longer execution time with a new tool

Anything that'll add value will take time. Especially when you're adopting a new project management software.

Question: how long is ideal for choosing and switching to a new project management software?

That depends totally on you, but many project management tools have quite a difficult learning curve to navigate with your team when you choose to adopt them.

Too many pricing plans and budget constraints

You can't change the world beyond your budget. Or, in our case, you can't get good project management software without a good budget.

As a responsible netizen, you probably already understand that whenever a service is free, you're often the product being sold.

Now, the question is simply how much is manageable enough for your budget to support. Here's another big area where choosing a project management software tool can be demanding.

Most project management software tools charge a flat rate when you're getting started but as your usage increases, pricing can start to get out of hand, threatening your budget.

A combination of sneaky pricing and a moderate budget may mean that you have several project management tools to choose from and little opportunity of working with any of them.

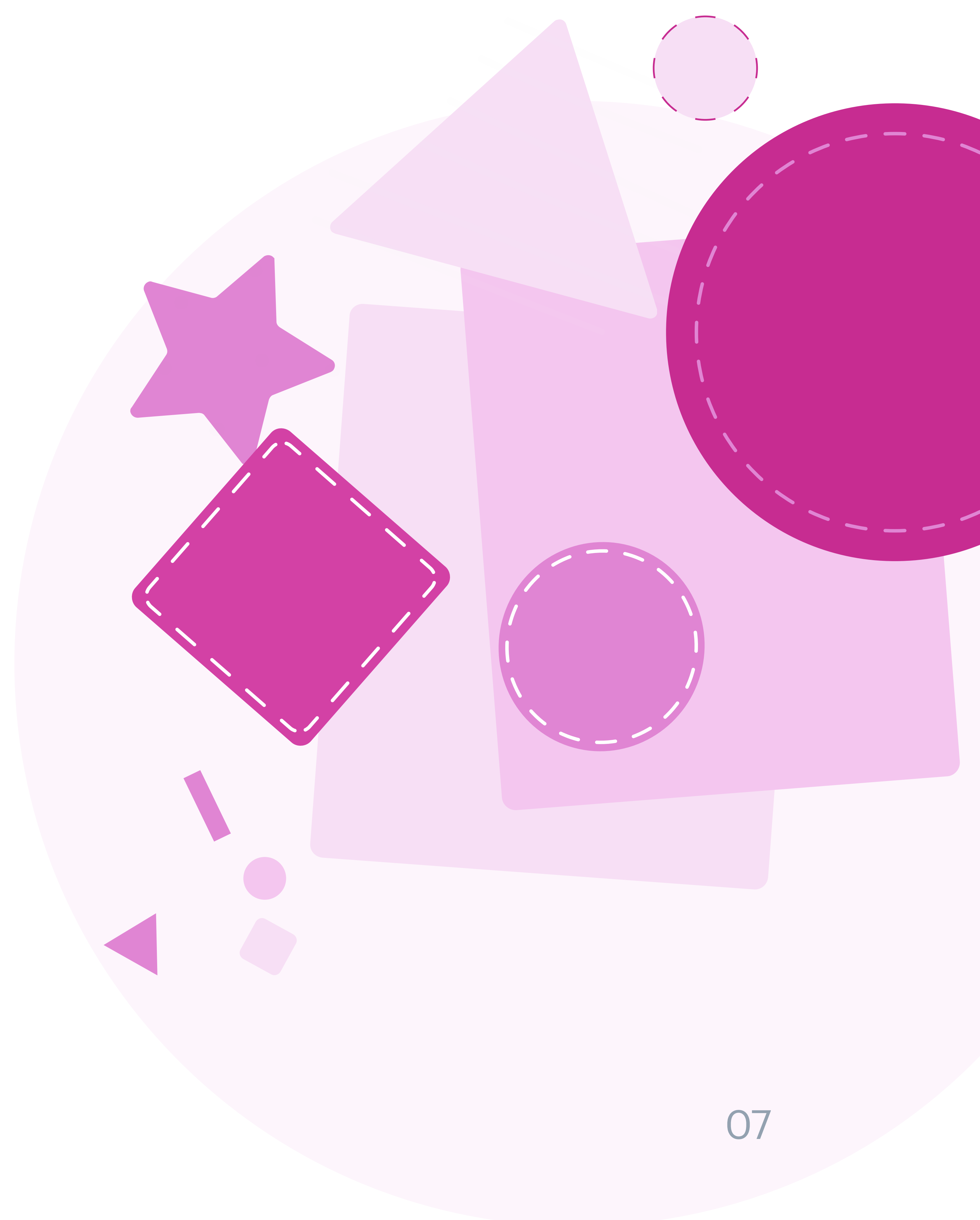
Limited customization on tools

Another big pain point with choosing project management software is the huge number of options you have to sift through.

There's little or no room for customization with the majority of project management software tools. You either stick with working the way a software developer imagined you should or just drop it and restart your search afresh.

While this is a huge challenge to surmount, it also offers us some insight into the type of project management tool you should be gunning to get.

Ideally, it's best to aim for a project management tool that empowers you to customize as the need arises. This makes it a more useful tool for the variety of situations you probably work in.



Benefits of using project management software

Before we get started explaining how to choose the project management software suited to your organization's needs, we must first define exactly what it does.

[What is a project software going to help you achieve if you choose to invest in one?](#)

To justify the investment you'll be making on it, you need to understand exactly what a project management software will help you achieve. Here are five key benefits of using a project management software.



Unify all your work in one place—eliminate fragmented work and software fatigue

According to [McKinsey](#), the average knowledge worker spends just under two hours daily shuffling through apps, tools, and files.

Over a 40-hour work week, that equals 10 good hours.

Over a year, that constitutes 25% of active working time wasted jumping from Asana to Trello.

Does that mean productivity & project management tools are bad or inadequate? Not at all.

On the contrary, project management and productivity tools have never been this advanced. But we have just too many of them. And that's proving to be a distraction.

Create and assign tasks in Google Sheets, receive alerts in Gmail, store and share files in Google Drive, collect data with Typeform, JotForm, or Google Forms, and glue it all together with lots of Zapier glue.

This creates a lot of room for everything to crash if one channel gets disconnected. Likewise, it's hard to track all your work with certainty when it's all over the place.

An ideal project management tool would be one that combines your project management A-Z into one toolkit where it's easy to visualize everything from 30,000 ft., [manage collaborators](#), and share with ease.

Manage tasks with ease—always know who is responsible for what

You’ve probably been in this situation a couple of times. The entire team agrees to do some work at the start of the week.

You plan, strategize, and all. Come end of week, the team leader asks whether you completed a certain task.

Of course, you didn’t. Didn’t he ask Jenny to do it instead?

Jenny? She was busy and asked Mike to pick up the slack instead.

Mike was out-of-office and he had his assistant reach out to Brett to put the task on his queue...

And on and on. Long short story—nothing got done.

This scenario plays out often in organizations where there’s no unified way of managing tasks.

No one—not even the team lead— can keep track of what they’ve been assigned, how urgent it is, and what they need to deliver on it.

As a result, tasks are never delivered on time, deadlines are not met, and projects stagnate.

An ideal project management tool should offer one place where you can manage tasks, assign them, and keep track as they’re completed. No one should be second-guessing what they should be doing per time.

Automate work with powerful processes

Depending on the project management methodology you work with, you probably have a process you use for managing projects, right? Something like a series of steps a project goes through from start until it’s completed.

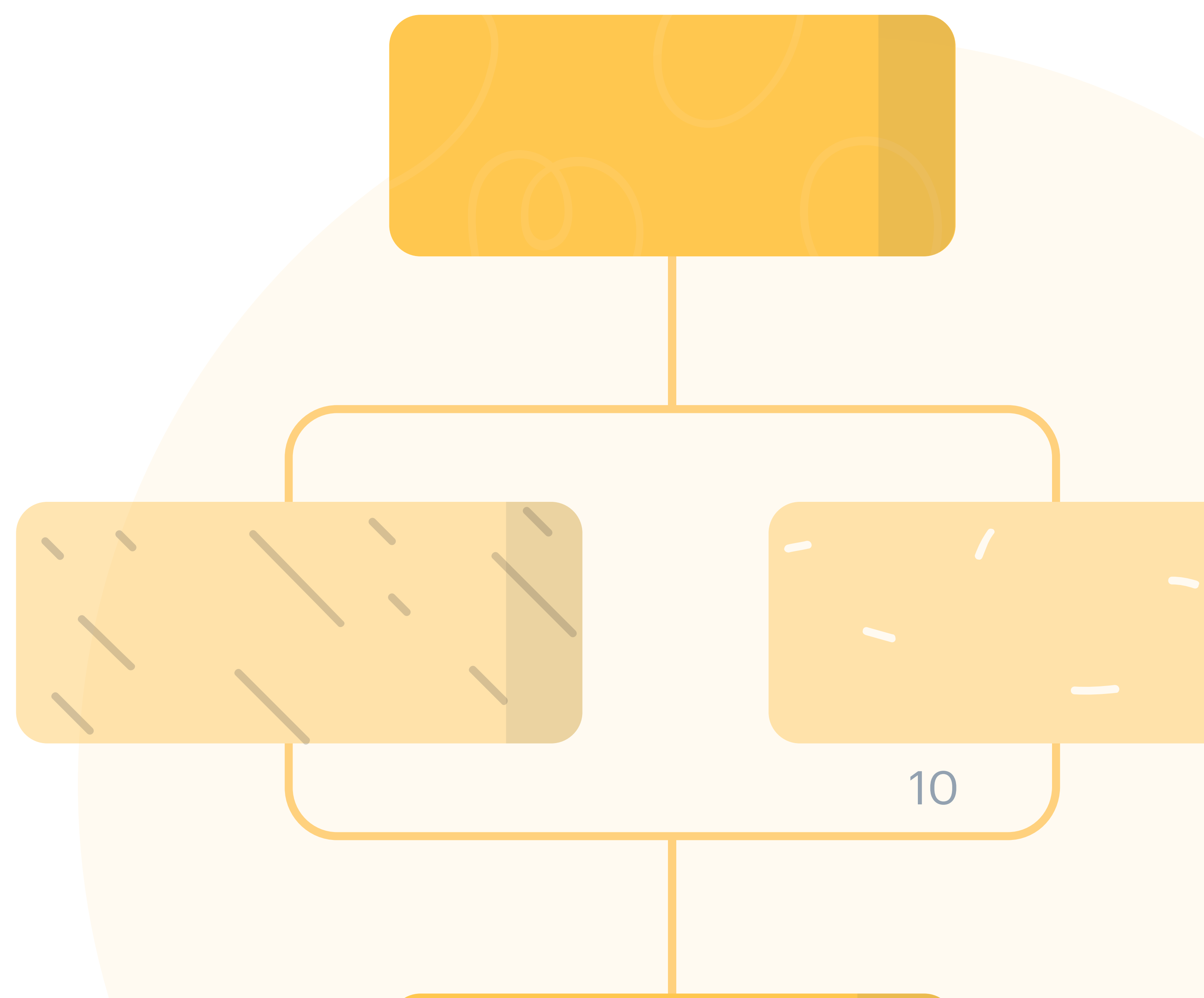
Now, how do you remember to run that process every time if it’s all in your head?

Even if you’re the team lead and have it all memorized, how do you get team members to know where a file should go when they’re done with it? Call you every time to ask? Or pull out a printed checklist?

It’s easy to see you can’t succeed in project management without processes, so how do you run them?

Automate.

A project management software helps you build processes that suit your needs, map how work flows, assign team members at each relevant stage, and run these processes with ease.



Move data seamlessly—and fast, and eliminate endless email threads

It's the 21st century, the age of Slack, Facebook, Tesla, and (fill in the blanks...)

We have an app for literally everything.

One way you can leverage this new power of tech is by automating tasks so that software completes them for you and your team focuses on higher-stakes work.

That's where automation comes into the project management equation. Instead of spending 25% of each week sending emails, notifying colleagues, and sharing files, there's a better way.

Powered by automation, modern project management tools move data from one place to another, notify team members of any changes, etc. all on autopilot.

An ideal project management software eliminates the need to manually move data every time.

Manage your work with greater visibility

Let's say you have four phases of a project planned out. Each is scheduled to take a week for the project to be completed in a month. By the third week, you're just rounding up on the second phase, putting out fires on the deliverables you have to make.

Not surprisingly, at month's end, you still don't have your work completed. All you've got is a scattered mess of half-finished work, burnt-out team members, and low morale.

Sadly, this is the norm for many teams. Without [a tool for tracking progress on a project](#), no one knows where to concentrate effort to get the best outcomes on time and under budget.

An ideal project management tool should empower you to visualize all your work from a 360-degree view and uncover what's working, what's not, and what to fix to get better outcomes.

Busting project management myths

What does project management software not do?

As the axiom goes, the best way to define anything is to define what it's not.



Project management software is a perfect fit for that expression.

In this situation, to understand just how project management software will improve your business is to clear doubts on what you may think it is but it's actually not.

Project management is not task management

For anyone who's been in the project management field, it's easy to start using project and task management interchangeably like they're synonymous.

[In reality, there's a world of difference between them.](#)

Project management is all about creating targets, planning, and executing to achieve a big-picture goal.

On the other hand, task management deals with managing the tasks a project's goals have been broken into to ensure the bigger picture goal gets achieved.

While project management deals with the big picture of achieving a long-term goal, task management is all about delivering the smaller milestones that will add up to the bigger picture goal.

Project management is not reserved for project managers only

Here's another popular misconception different staff across an organization may hold, but nothing could be further from the truth.

In its essence, project management is all about setting targets, pursuing them, and taking the steps necessary to achieve them. [Given the right tools, just about anyone can coordinate a team, break down a milestone into tasks, and guide the team towards fulfilling these targets.](#)

In fact, even if not in a project lead position, it's important that other members of a team get a good grip on the tools of the trade so they can collaborate and flow together.

All-in-all, project management software is dedicated to equipping teams of all sizes with one place where they can manage big picture goals efficiently and collaboratively.



Project management software features you need to win

At the end of the day, a project management software is nothing but a tool designed to help you get work done. So, before you opt for any one, you need a very specific idea of the exact functions it should be able to deliver.

Put together, these functions are what will help you get work done, shorten project cycles, eliminate waste, and justify your investment on whatever tool you choose.



Task management

Task management is simply the art of managing a task through its lifecycle. Task management includes creating, assigning, executing, reviewing, and approving completed tasks.

Tasks are the smallest unit of work in the project management process, and, as a result, go a long way to determine how much success you enjoy in your bigger picture efforts.

[An ideal project management software for tasks](#) would be one that enables you to:

- Create tasks with information and as many attachments as necessary
- Track tasks throughout the process
- Visualize the tasks assigned to you
- Attach files as required
- Make notes or comments as necessary

Task management helps in breaking work into manageable bits across the team to get it delivered faster and without guesswork.

Time Tracking

[Time tracking](#) is recording the hours team members spend working on projects and tasks. This can either be so they can be paid by the hour or for record-keeping purposes.

In general, time tracking helps you keep a pulse on just how much of your team's time is getting spent on relevant or unimportant activities so it's easy to know what needs fixing.

Communication & collaboration

Communication is the soul of project management. After all, no one works in a vacuum and you need your team to assist you in achieving your big picture goals, right?

[Communication in project management](#) is all about making sure information flows smoothly from wherever it's generated to where it's needed at the moment.

This quickens the working process since employees are more focused on delivering tasks vs. searching the web or waiting hours to get a reply via email.

Communication and collaboration tools may be in the form of:

- Chats
- Comments
- Notifications
- Mentions

The aim of communication tools in project management software is to share knowledge and ensure team members have the information they need to do their best work always.

An ideal project management tool must simplify communicating to ensure no one lacks the information they need to do their work.



Visual tools—Kanban boards, Gantt charts

Visual elements are an important part of modern project management. They help bring context into the process and present data in a more appealing and assimilable format.

We humans are visual creatures and absorb picture and video content 60,000x faster than text content.

[Kanban boards](#) are a visual planning tool used for managing projects under the Kanban methodology.

They feature cards filled with task details and swimlanes that signify task stages. Moving cards from one swimlane to another signifies tasks moving through your task management process.

[Gantt charts](#) are a visual planning tool that visualize tasks moving through a timeline. They are a great tool for managing tasks and planning against a moving time frame.



Customizable processes

A process is a sequence of tasks needed to achieve a specific goal.

Processes are a key driver of results in project management since they empower teams to achieve certain classes of tasks without manually transferring data, assets, and information.

They are made up of the different stages of automation that combine to make work as smooth as possible.

An ideal project management software tool would be one equipped with process builders so you can create customizable processes to streamline tasks.

Reporting

Reporting takes all the data you generate in the project management process and presents it as refined insights, trends, and actionable information.

Reports offer a 360-degree overview of your project management and help you to easily detect what's working, what's not, and what could be improved.

A great project management software tool should be able to store data long term, aggregate that data, segment it, and present it in [detailed reports](#) for stakeholders.

Forms

Project management is all about taking data, processing it, and acting on the information it gives you. And if you're looking to adopt the ideal project management software, you need a way to collect the data you need to process.

Forms provide the ideal tool to acquire as much information you need, segment it, and integrate it with your entire project management stack to make sense of it.

Choosing the perfect project management software for your needs

Knowing what to look out for when shopping for project management software is half the job done.

You need to be able to:

- Determine whether you need a new project management software
- Understand the specific type of project management software you require

This way, you'll be able to find a balance between buying pricey, advanced software that you don't need and an affordable, yet underpowered tool.



How to determine if you need a new project management software

How do you decide whether you need a new project management software to save your next buy from being another shiny software kit that never gets used?

Here's an easy-to-follow guide to determining how you should invest in a new project management tool.

Define your need

It's a no-brainer.

The first step to take when you're looking to acquire a better solution is to first define the problem you're trying to solve.

But in the race to get started with better project management, it's easy to lose sight of this and jump right into Google search for snazzy project management apps.

And after an hour or so, you're confused with the handful of project management software tools that all look like "the one."

Easy fix: define your need. Understand exactly what you're trying to achieve before you set out trying to get it done.

Write down a clear vision of where your current project management tool could use some help or any areas where it performs below your expectation.

Understanding what your project management needs are helps you to be specific in your search for a new solution.

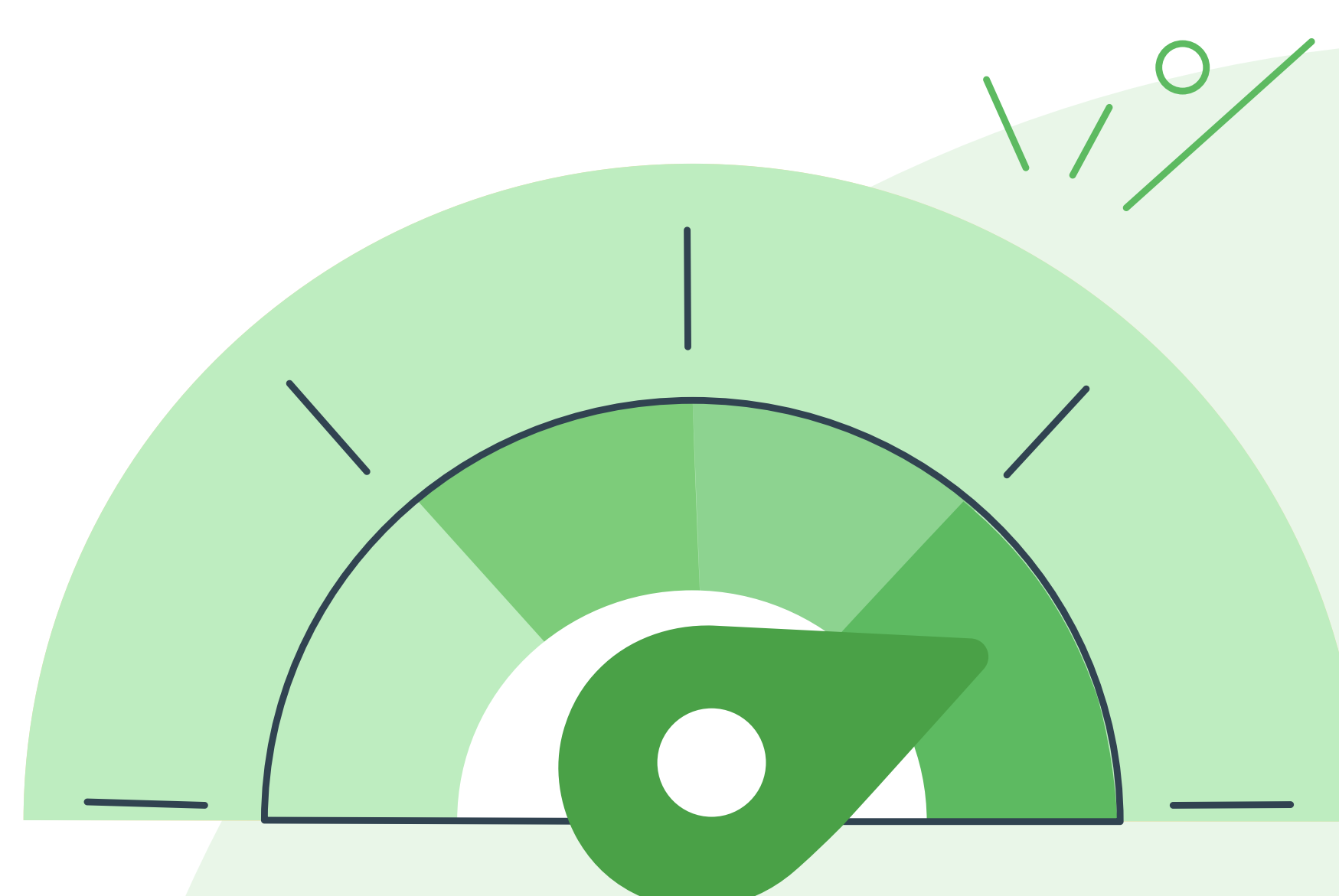
Evaluate your current tool's performance

Once you have an idea of what your project management software tool should be offering you, the next step is to evaluate how well your current tool is filling that need.

This gives you a clear outline of where it could be better as you're shopping for a new tool to replace it. Some questions that could help you better understand what you need include:

- What existing or missing feature always holds up our work?
- What do we envision to do with our current solution that we don't?
- What features do we have to string together other tools to get access to? Can another tool offer it all in one kit?

Understanding how your present project management tool could be better serves as the best way to define what you need in a new one.



Choose a tool that checks all your needs

Once you have a grip on what project management features you need and how well your current project management tool fits that bill, next up is to use that as a canvas for choosing the ideal project management software.

Of course, given the number of competitors in the project management field, it may be hard to glance at once and discover exactly which tool to choose from a hundred and one.

That's where detailed reviews come in. Here's where you break down each tool into the features and flexibility it offers and start comparing them with the product vision you've created.

And if a number of tools appear to be suited to your needs, you can go ahead to shortlist them for the next step.

Test your shortlist

With a few tools that look like it, it may be hard to determine which one exactly fits your needs best. Until you start testing.

Grab each one of the project management software tools shortlisted and take each one for a test run along with your team.

Just allow each one to feature as a supporting project management tool for your testing team for, say, two weeks (14-days free trial).

During and after that period, interview your team to understand how well the project management tool fit into their day-to-day workflow.

With the data you accumulate, you'll be able to determine the best project management tool that'll serve your needs on a daily basis.

Remember to involve your team throughout the process: Project management is a team sport and for it to work, everyone's unique needs have to be factored in before you can choose a well-rounded tool.



How to identify the right type of project management software for your needs

One of the key tasks we mentioned for determining whether you need a new project management software is to choose a tool that ticks all the boxes for you.

More importantly, given the variety of project management tools available on the market, you need to choose the specific type suited to your needs.

And this can't be an impulsive decision. There's a process involved in evaluating your needs and finding the type of project management tool that best addresses your pain points.

Choosing the right type of project management software can make or break your project management process since that'll determine just how much you'll be able to solve pain points, communicate information, and manage your work.

Here are a few actionable steps for choosing the right type of project management software.

Define your situation

It all starts with clearly outlining where you're at.

With that done, you can then proceed to tracing a path to where you want to be. Defining your current situation is all about looking long and hard to understand what your needs look like.

If you're just a one-man team, it's best to adopt an individual project management tool that lets you manage your work without any advanced collaboration. But very rarely will an individual project management tool do the trick since you will still have to collaborate with clients.

If you have a team of multiple members who need to always stay on the same page, you need [a collaborative project management tool](#) that will keep everyone coordinated.

If you want to build more flexibility and availability into your project management process, you'll need a cloud-based tool that stores and updates all your data on the web in real time.

The first step in choosing project management software is to first define where you're at since it'll help you chart a course to where you're headed.

Evaluate potential project management software options

Again, before you adopt a specific project management software type, you need to go hands-on with the options out there.

Shortlisting potential options is where you collect all the features you need in a project management tool and start to identify the project management tools that can meet your needs comfortably.

Test out your options

Just because it's spelled out on their homepage doesn't mean a project management tool will actually offer the experience you expect it to.

The testing phase is where you grab each of the options on your shortlist and start to extensively test them with your team to determine whether it's the type that's suited to your needs.

At this stage, you may have to make a couple of trade-offs if nothing perfectly fits your taste.



Buying project management software is more complicated than checking out a few landing pages and homepages and going along with whatever catches your eye.

Given that your team will be working with whatever project management tool you pick for the foreseeable future, it's important to make a choice that empowers you to achieve your [project management goals](#) in the short term and in the future alike.

Now, as we've said already, the functionality a project management tool can offer you is tied to the features built into it.

And that simplifies buying project management software down to just one question: what features do you want your project management tool to offer?

Here are some of the key features you'll need to guarantee project management success.

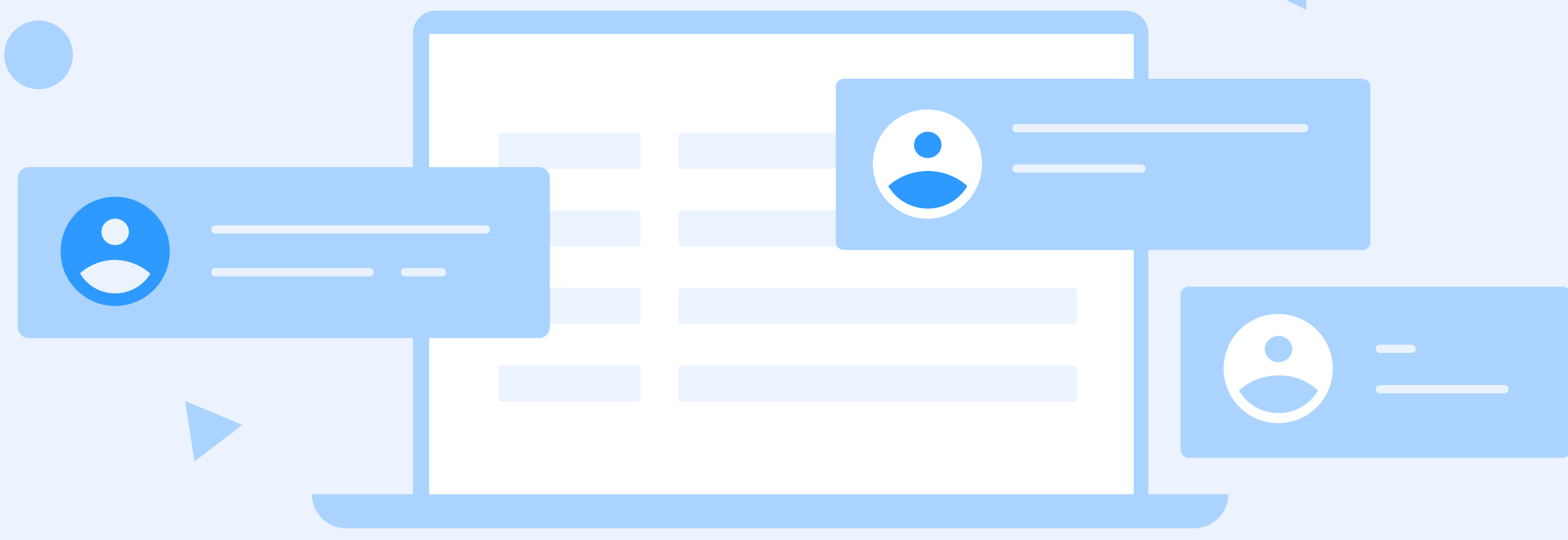
- **Task management** for creating, assigning, and tracking action items within your organization
- **Communication** and **collaboration** with chat, @mentions, and notifications
- **Time tracking**
- **Visual planning tools**, like Kanban boards and Gantt charts
- **Forms** for collecting data used for running workflows and processes
- **Workflows** and **processes**
- **Reporting**, analytics, and data segmentation

With a clear vision of which of these features you need, you can start shopping around for the perfect match that offers them.

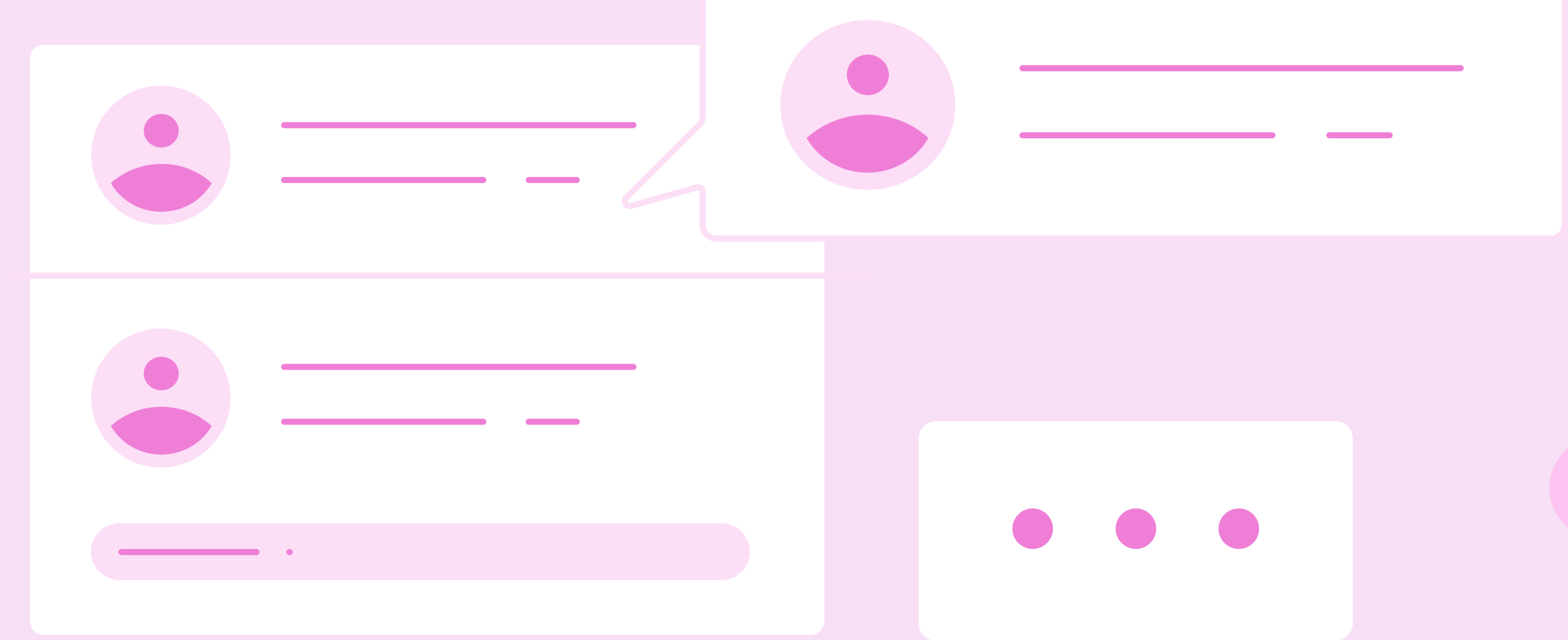
And for the record, [Kissflow Project](#), our homegrown project management tool offers all these features and even more for teams of all sizes.

Kissflow Project is designed to help you get started simplifying your project management so you can deliver projects faster and within budget.

Using Kissflow Project you can



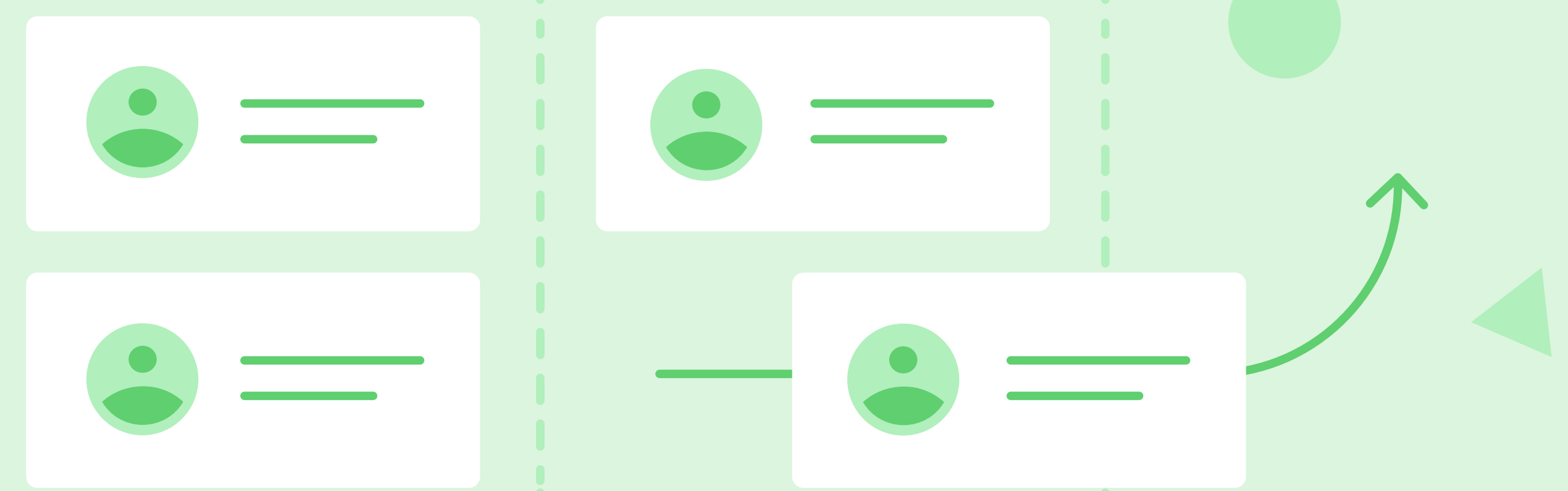
Create, assign, and track action items across your organization



Communicate and collaborate with team members



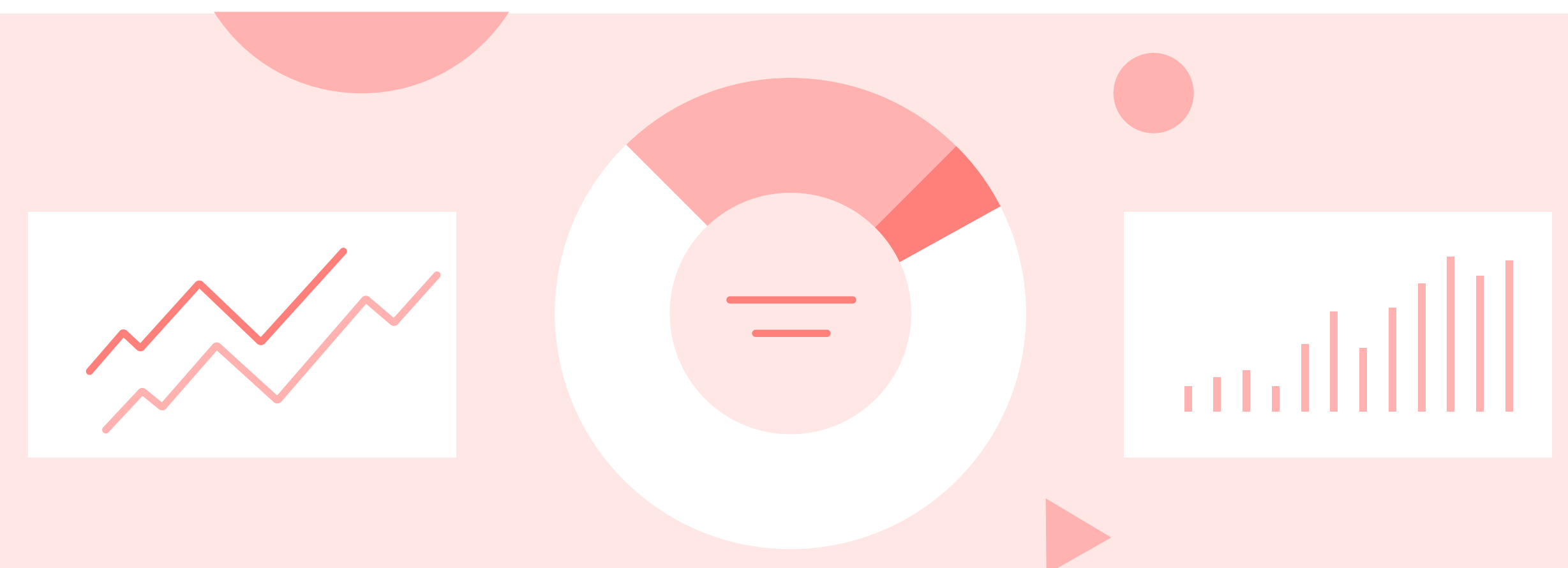
Improve efficiency by tracking time for individual tasks or entire projects



Plan visually with tools like Kanban boards



Collect and segment data for your workflows with dynamic forms



Get the bigger picture of your project management with in-depth reports and analytics

[Kissflow Project](#) empowers you to simplify your project management so you can get more done with fewer humans shuffling through files and endless email threads.



Project

Learn more about how Kissflow Project can transform your project management [here](#).

Try it now