



3 Common Mistakes To Avoid When Choosing a PPM Solution

Avoiding these 3 mistakes can help select your next project portfolio management solution with confidence.

Avoid these mistakes with Proggio.

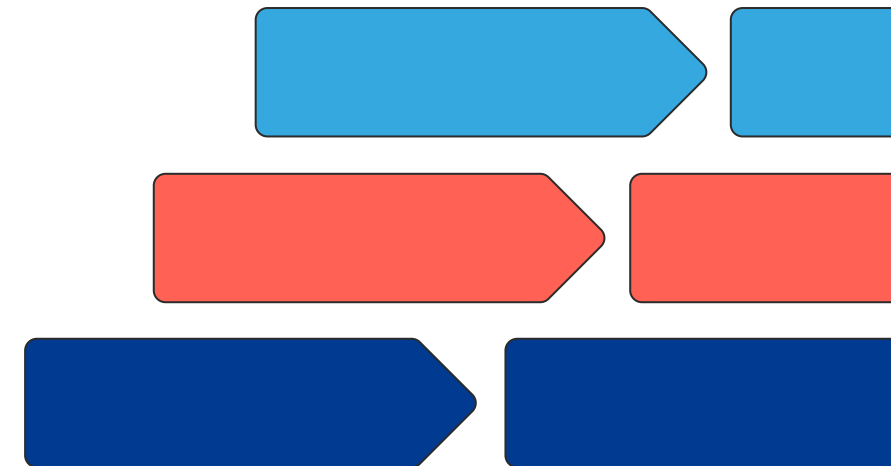
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Introduction

Selecting a project portfolio management (PPM) solution in 2021 can be quite challenging if you don't have clear selection criteria. A quick glance at existing solutions yields an assortment of tools with different focuses, different capabilities, and very different time-to-value benefits.

Finding the right solution for your organization is critical to accelerate growth, meet business goals, and keep everyone focused around the same objectives and priorities.



Mistake #1

You're being misled by so-called capabilities

Today, several ticket management systems and communication systems in the marketplace are misleadingly labeling themselves to be a “Project Management” solution. Choosing their system specifically for this important capability that you need to work for you will lead to a huge waste of time and money.

Here is a quick checklist of items that are fundamental criteria you should use to help you qualify a winning competitive project portfolio management solution:

- **Top-down planning:** Starting from your strategic goals down to your tactic operations
- **Portfolio visualization:** High-level view of all your projects, with timelines and statistics
- **Tracking capabilities:** Ongoing project progress tracking and analytics
- **Project visualization:** Project diagram that people understand
- **Share options:** Ability to collaborate with people over a shared, online timeline
- **Resources management:** Mid- and longer-term resources capacity calculation
- **Data collection:** Ability to add metadata, files, and notes to any project object
- **Built-in collaboration:** Communication within the project team at all levels
- **Budget management:** Target, plan, and capture actual expenditures
- **Task management:** Short-term execution in the context of your projects

Mistake #2

The PPM tool is not that "easy"

If you didn't fall for mistake #1, you already know that you will be getting the basic capabilities from your selected solution. But how long will it take to extract the expected value? Is the effort-to-value reasonable, and is it worth the effort at all?

These questions are extremely important since so many project management tools just can't get through the day-to-day difficulties and existing (bad) habits of their users. Some solutions are just too complicated, too hard to adopt, or just not modern enough.

Consider the ability to deploy with these criteria:

1. Is this solution adoptable for various users?

Will people learn it alone or will it require weeks, or even months of training? Solutions that require expert know-how will mean that it will be difficult to get everyone within your organization to contribute to a single source of truth, which in turn will create data islands, and ultimately make it more difficult for PMOs to stay aligned with their goals.

2. What kind of support do I get as an admin when onboarding the solution?

Questions are inevitable. Make sure that the solution you choose

will have onboarding support that is easily accessible, fast, and helpful. It will save you time and effort, and it will increase the chance of success.

3. Customization

You don't really like to go back to the vendor with every change. What kind of customization capabilities are built-in for the end user? Make sure that you don't need any external help, and that these are self-managed options.

Mistake #3

Choosing a solution that doesn't give you a competitive edge

Having a competitive edge not only will put you ahead of your competition, it will help open the door to new opportunities and innovation into your organization.

Here are several leading-edge capabilities to consider:

- **Strategic Goals Alignment** – Allow the director-level to connect organization's strategic goals with the operational plans
- **Customized visualization** – Allow users to build their own high-level views, dashboards, and data tables
- **Project lifecycle management** – Managing projects goes beyond task assignment and execution. See your projects through from ideation to delivery in the same platform that you execute.
- **Mobile adoption** – Don't count on people installing mobile apps! Modern solutions can be adopted into mobile screens with the web app and a standard web browser
- **Remote work or seperatly located team members** – Ability to collaborate over a shared timeline from multiple locations in real time
- **Project prioritization** – With so many project ideas and pipeline projects, prioritization is key to keep the team focused on what really matters
- **Integrations** – How the solution interacts with other applications, office suites, and Enterprise operations solutions
- **Risk management** – An integral part of project management methods, project risk analysis must be tracked to avoid obstacles and delays.

Summary

Avoiding these 3 mistakes can help select your next project portfolio management solution with confidence, knowing that you covered all the key aspects. To make it easier, you can list the above bullets as a base for your next RFP, working with solution vendors.

Good luck selecting your next solution!

If you are interested in learning how you can avoid these mistakes with Proggio, schedule a quick call with our solutions manager.

[Schedule a call >](#)





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Get the PPM tool built to empower PMOs with the visibility they need to be in better control.

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