

HOW TO SELECT A PPM SOLUTION WITH CONFIDENCE:

BUYERS CHECKLIST

In this guide you'll find templates for the steps you need to take to confidently recommend a shortlist of PPM solutions.

Our aim is to help you choose the right platform to manage an entire portfolio of work from one place, whilst giving stakeholders the real time information they need to make decisions so you can show your value.

iCoTech Services

DO YOU NEED A PPM SOLUTION



There will be a time when you need to consider whether your processes align with your available technology and, if not, whether to update them or update the system.

What is the purpose of the PPM Solution?

	Business Response
How could a new solution stack up against your long-term goals?	
What exisiting tools will the solution need to connect to?	
What resources will you need to implement a new solution?	
What's the urgency of addressing this issue?	

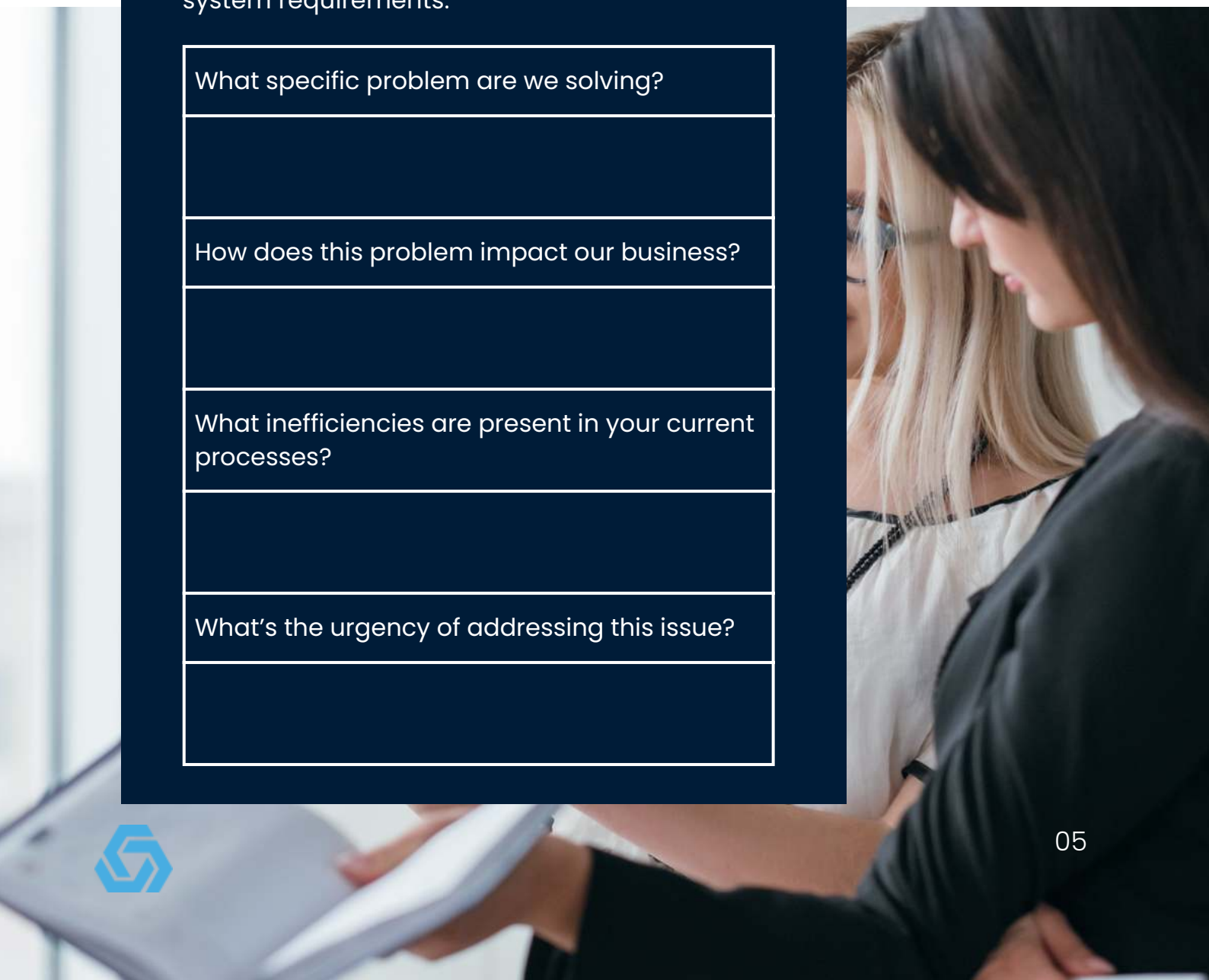
Tip: Engage key stakeholders early in the process to gain a comprehensive understanding of pain points across departments.

CONSIDER CURRENT AND FUTURE REQUIREMENTS

A strong business case will need to feed into your organisation's strategic objectives.

Start with a half day workshop with key stakeholders to understand the problems you're trying to fix and to gain clarity of the system requirements.

What specific problem are we solving?
How does this problem impact our business?
What inefficiencies are present in your current processes?
What's the urgency of addressing this issue?



MAP YOUR PROCESSES

Map out your processes so you can make the new system work for them, whilst simultaneously considering ways the system can help improve them



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DEFINE HOW A SOLUTION WILL HELP

Drill down and capture your current needs and future requirements.

Focus on right now

- Review your excel spreadsheets, SharePoint Lists, the reports.
- Consider what visibility and planning engines you need.
- What could you digitise to make things simpler and better?

Planning:
Do you require top-line or detailed planning with tasks that have assignments underneath them?

Timesheets:
Will you record time to understand how long critical task take or is this not a requirement in your business?

Resourcing:
Do you need to have oversight of incoming and active portfolio work to understand resource demand?

Processes:
Are processes defined and embedded? Do they use the same methodology across projects or differ?

Then... consider where you want to be in 3 years?



GET YOUR DATA IN ORDER

Transferring bad data and processes make any solution redundant so taking time to improve all underlying components is important.



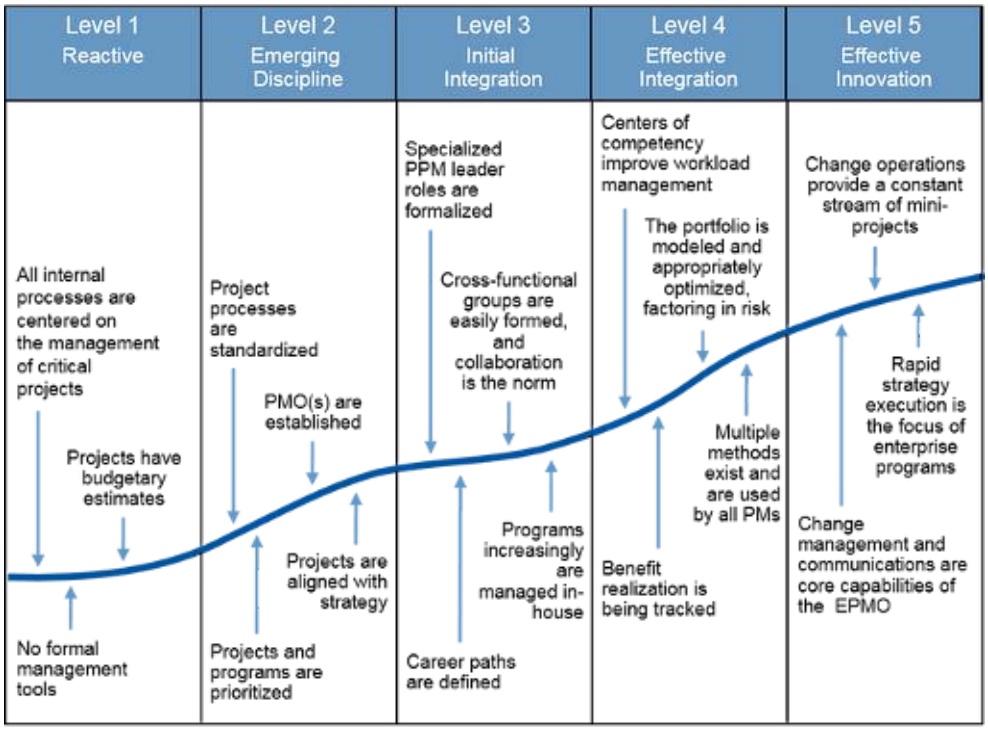
Data Worksheet

	Discussion
What data do you have?	
Where is it held?	
Why do you need it?	
How are you going to use it?	

ASSESS YOUR PROJECT MATURITY

You don't necessarily need to look too far into the future or subscribe to 'bigger is better'. And those that do are likely to over complicate their processes and cripple user adoption. Consider your PMO maturity through Gartner's maturity matrix before deciding on an elaborate PPM solution.

The general consensus is it's better to begin with out-of-the-box solutions if you are one of the 80% of businesses which Gartner says are in the nascent stages of maturity. Only those level 3 or above should consider more complex PPM solutions.



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ASSESS YOUR OPTIONS

What type of solution do you need?

One size doesn't fit all; not everyone needs a PPM solution.

Project Management:
For those that require a work breakdown structure and simple task management for individual projects.

Portfolio Management:
Get visibility of all projects to helps you to determine whether you're focusing on the right projects.

Project Portfolio Management:
Track and manage your projects, programmes and portfolios across your business.

What category fits your needs?

Low Functionality: These are solutions are best suited to start-ups as they aren't directly designed to operate as a Project Portfolio Management system, but can be tailored and used for some sort of PPM system.

Turnkey SaaS: Easy to get up and running quickly and have a great user interface and experience. They work best for a small team of Project Managers, but they don't easily scale and configure with other products.

Heavy Solutions: For large Project Portfolios within Construction, Engineering or Enterprise Scale Delivery teams. These are powerful and comprehensive but are very expensive to setup, and can't be configured quickly and iteratively.

Flexible Solutions: These don't have the high costs of an Enterprise system but are flexible and built iteratively to grow with your business needs. Built on the premise of one size doesn't fit all; they are flexible, scalable and adaptable to most needs across PPM but take an iterative approach to implementation.

BUILD YOUR SHORTLIST

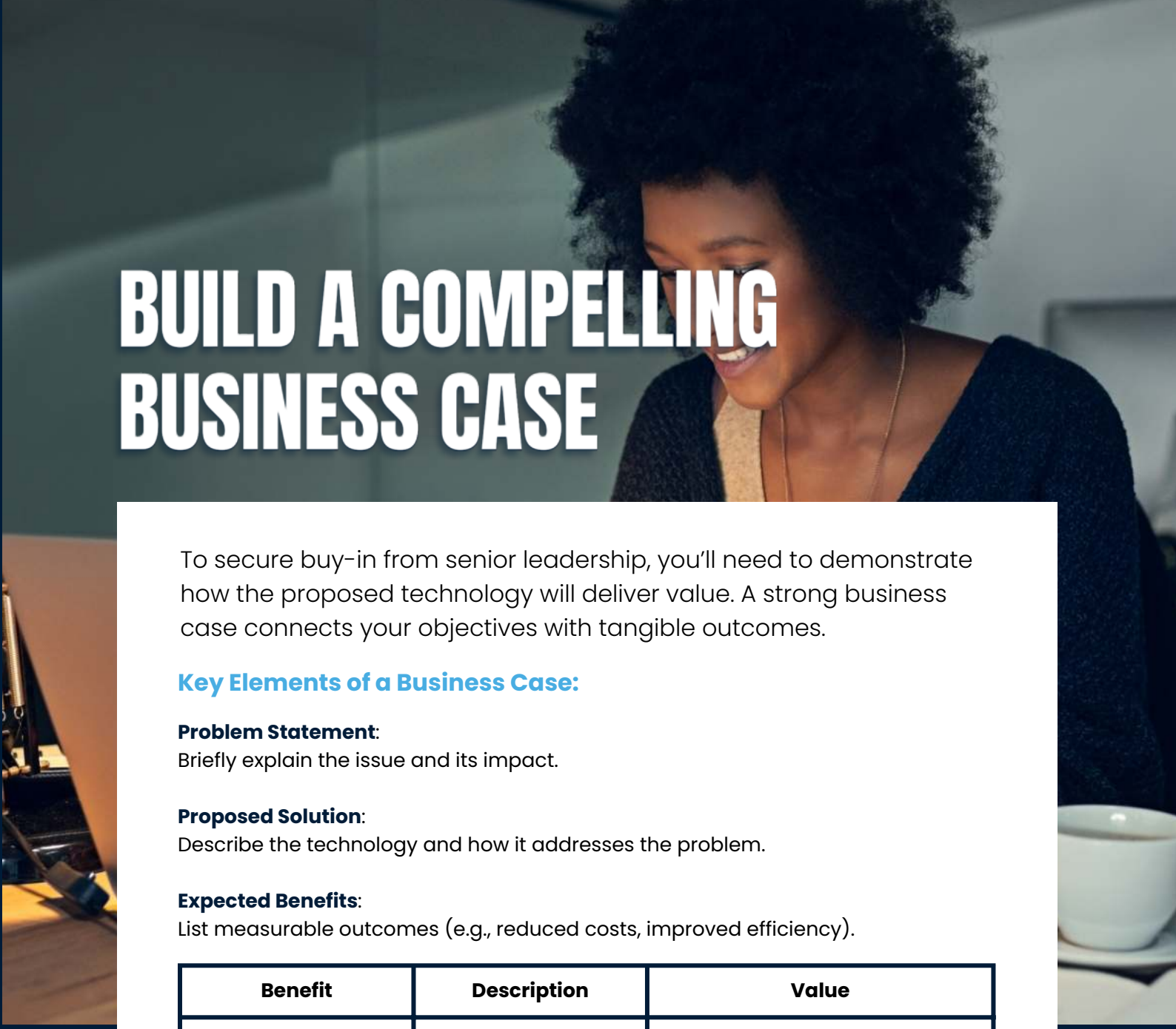


When it comes to putting a shortlist together you will need to balance all your research and consider what is most important to you - usability with lean features OR broad functionality and reporting. There are also industry specific PPMs.

Consider:

- Technical Criteria and Interoperability
- Usability and Adoption
- Cost

You can read more about these considerations in our in-depth report on buying PPM solutions with confidence.



BUILD A COMPELLING BUSINESS CASE

To secure buy-in from senior leadership, you'll need to demonstrate how the proposed technology will deliver value. A strong business case connects your objectives with tangible outcomes.

Key Elements of a Business Case:

Problem Statement:
Briefly explain the issue and its impact.

Proposed Solution:
Describe the technology and how it addresses the problem.

Expected Benefits:
List measurable outcomes (e.g., reduced costs, improved efficiency).

Benefit	Description	Value
Time Saving	*Automating manual reporting saves 20 hours per week.*	*Example: £15K/year*

ROI Analysis
Calculate expected ROI using this formula: ROI (%) = [(Net Benefit) / (Cost)] x 100

Risks and Mitigation
Identify risks and your plan to mitigate them.

Risk	Likelihood	Mitigation Plan
Low adoption rates	*Medium*	*Tailored training and onboarding*

ENSURE ADOPTION ACROSS THE ORGANISATION

Even the best technology is useless if no one uses it. Adoption should be a priority from day one, not an afterthought.

Steps to Drive Adoption:

Engage Early:

Involve end-users during the planning phase to ensure the solution meets their needs.

Tailored Training:

Develop training programs specific to different roles and technical expertise levels.

Communicate the "Why":

Show teams how the technology simplifies their work and aligns with the organisation's goals.

Monitor and Support:

Use feedback loops to identify adoption challenges and provide ongoing support.



CHECKLIST FOR SELECTING A PPM SOLUTION:

Understand your needs

- Understand if you need a PPM solution
- Define your current and future requirements
- Map your project processes.

Understand your position

- Get your data in order
- Assess your project maturity
- Consider your PPM solution options

Understand your best choice

- Gather a vendor shortlist
- Build a data-driven business case.
- Drive user adoption

At iCoTech we apply our knowledge and expertise to design innovative solutions to give you more control over project delivery and better management over your portfolio with Microsoft Power Platform and Planner.



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