



Project Management Advanced Diploma



Computers & PM – Josephine Coffey

Computers & PM – Week 3

- Overview of Computers & Project Management
- **Guidelines for Procuring PM Software**
- Project Management using MS Office applications

Computers & PM - Josephine Coffey

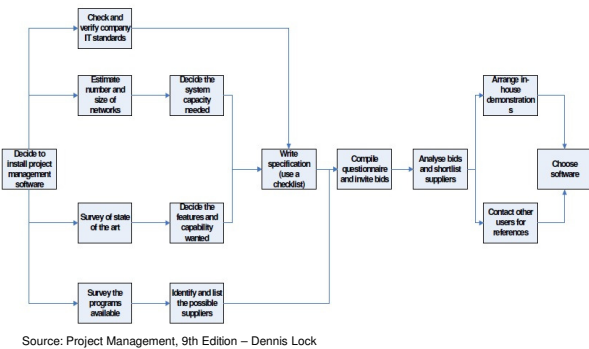
Process for PM software selection

1. Assess existing situation
2. Form selection group
3. Begin research – best practice, industry standards, suppliers / vendors
4. Consider functional & support needs
5. Begin cost-benefit analysis
6. Compile detailed questionnaire – functional & technical
7. Create Long List

Process for PM software selection

8. Create Short List & arrange vendor presentations
 9. Contact other customers
 10. Select preferred vendor
- Project Management, 9th edition (Dennis Lock)
- Lock's Selection Process

Lock's Selection Process



1. Assess existing situation

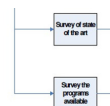
- Compile list of apps already in use
- Consider nature of existing PM organisation
- What are you hoping to achieve?
- Technical constraints
- Budget constraints
- Any criteria that allow existing apps to be discounted?

2. Form Selection Group

- The chairperson (sponsor) e.g. project management office manager
- An IT representative
- Business area specialists (operational)
- PMO staff and some of the organisation's Project Managers
- Group should be clear on objectives of a new tool

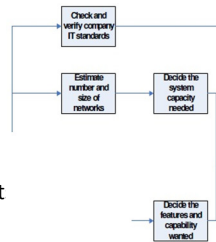
3. Begin research

- Internet search, publications & PM org (PMI, PRINCE2)
- Professional and Personal contacts
- Hire consultant
- Purchase PM Software [RFP](#)
- Keep record of research, contact made with vendors
- Download demos



4. Functional & Support Needs

- Requirements gathering
 - Fact finding
 - Interviews
 - Observation
 - Document & Scenario Analysis
- IT/Operation support requirements
- Capacity Needs? Nr of users, project
- Implementation needs



4. Functional & Support Needs

COTS & Customisation

- “Commercial off the Shelf” packages (COTS), sold-as-seen
- Customisation is process of getting software changes made
- Most solutions involve a combination of both
- Integration with existing systems may be required

5. Begin Cost/Benefit Analysis

- Consider available budget
- Assess benefits:
 - Functional
 - Productivity
- Estimate Costs:
 - buying, customising, installing, operating and maintaining the new system
- No mention of CBA in Lock’s process (Gap?)

6. Compile Detailed Questionnaire

- Specification requirements and minimum capacities
- Questionnaire for purchase of software
- Request for Proposal (RFP)
 - Lists requirements as questions; include technical reqs e.g server types
 - “Weight” given to each item
 - Give Vendor choice of responses to select from e.g. Supported, Unsupported, Enhancement required
 - To be sent to vendors on Long List



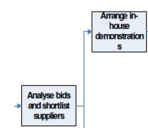
7. Create Long List of Vendors

- Prequalification criteria may be used
- Long list may contain 5-10 vendors
- Cover Letter and Questionnaire (RFP) sent
- Score responses
Weight x Response = Score
- Compare responses & scores



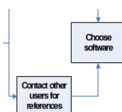
8. Create Short List & Arrange Demos

- Short List may be 3-5 Vendors
- Invite to deliver demos
- The Presentations
 - Provide agenda, sample project and use cases
 - Score Sheet should be used:
summary of questionnaire items plus demo related items
- Each Group member scores Vendor and results compared after demo



9. Contact Other Customers

- Make efforts to discover experience of other companies with the short-listed tools



10. Select Preferred Vendor

- Decision made on “preferred bidder” based on all available information and on completed Score Sheets

Summary

- To justify the cost and get the best fit for your organisation a PM Software Selection Process should be used
- The more detailed and specific to your needs the RFP questionnaire the better the short-list
- Use scoring to rate responses and demo so best Vendor is selected to meet your needs