Introduction

Thus far, we've just discussed the techniques and strategies that you can use to manage your projects better and why you need to do that. In this lesson, we're going to talk about how you can find the perfect project management tool for you and your business so that you can actually put all of that into action and stay organized easily. At this step we are going to discuss what to look for in a project management system.

Basics of choosing a project management tool

There are lots of different things to think about when you're choosing a project management tool. However there are a couple different things that you can ask yourself to narrow down the scope and just choose something:

- **Mobile experience**. Will you be accessing it on the go? For me, this is a deal breaker. If something doesn't have a mobile app, or at the very least, a responsive well-designed mobile website, I just can't use it. That might not be the same for you. But if it is, it's something to think about and it's something to check before you invest yourself into a system and put all of your tasks and information in there.
- **Desktop app**. If you work a lot without the Internet access, then having a desktop app is really useful, especially if you don't have a mobile app. That just means that you'll have an easy way to access it on your computer with all of the tasks synced offline. This is not something that many tools offer.
- **Budget**. How much can you spend? I don't recommend cheaping out on this. That said, there are some really great low-cost and free solutions. You can definitely find a great project management tool for about $10 a month or less. $20 a month might be good as well, but spending any more than that is probably overkill, assuming that you're running a one-person business, unless you have really difficult needs.
- **Recurring tasks**. This is a surprising, but many tools are lacking this feature. If you have a lot of such tasks in a project, manually moving them can be a pain. It might only take about 30 seconds each time, but that adds up if you have many of them in your projects.

Delegating

Another thing to think about is **delegating**. How often do you work with a team, and how often do you have to delegate? These are both things to think about because some tools are more adapted for personal task management. So if you need to start adding people in or if you anticipate having more of that soon, then you want to look for a slightly different feature set.

File attachments

File attachments is something that you should look for. This is more commonly available feature in full-fledged project management tools versus task management tools. An example of a task management tool might be Wunderlist, which is something that we're going to talk about later. They have expanded their feature set, and now you can attach tasks to it. But something like a Todo list app typically don't provide file attachments functionality.

This isn't necessarily a big deal if it's just you and you don't need to manage a team because the main usage of file attachments is when you're delegating to other people. For example, you might want to have everything in a central location, to avoid using e-mail for such task. The only thing that I can think of where you might want to have file attachments and you're not managing a team is if you work from multiple computers or you have a habit of misplacing and losing files.

Client usage

Client usage is another thing to think about. If your average client is actually going to be inside your project management system and using it to communicate with you and they aren't tech savvy, you need to be using a project management tool that's really easy to use and get the hang of. If you, on the other hand, will be working on their system, which is often something like Basecamp, you will still need something outside of what you're using to keep track of your internal stuff. For example, when I get pulled into a Basecamp project for a client, I still have client tasks in Asana, which is what I use. It is a little bit of duplicate effort, but it's really important to me to have all of those tasks in one spot, and that's how I stay organized. Even if you're okay with checking Basecamp, you still need to have that something else so that you can keep track of your marketing and administrative tasks and all the other stuff we've talked about that's not just client work, but that is absolutely necessary to running a business.

Discussion features

Discussion features are the things like commenting on a task, replying to comments, or tagging people. It just makes it easier to keep everyone out of their email inbox in this central location. So if you aren't going to be managing a team, or you're not using this to communicate with your clients, then these are not necessary.

Visual features and interface

Visual features and interface might not be as much of a deal breaker for you. For me, I always need something that is a calendar view, because I have a bad habit of putting way too much stuff on one specific day, so such view keeps me from doing that.

Another thing to think about is color coding. So if you want to be able to color code things according to client or to the type of work they are, then that's something to think about. I use color codes to see the difference between my internal work and the client work. This allows me to see the balance of my workweek at a glance.

Another thing is how far you can see into the future. You need to balance this so that you aren't getting too short-sighted or getting too overwhelmed. If all you can see is like, today and tomorrow, it's going to be hard to keep an eye on future events and make sure that you aren't leaving your client funnel totally empty two weeks from now. If, on the other hand, the default is a six-month view, that makes it really hard to be focused on what you want to do today. So depending on which way your natural tendencies falls, especially if you tend to be overwhelmed or if you tend to be short-sighted, this is something to keep in mind.