A picture containing bird, flower, tree

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|  | Whare tapere o hapori ao whānui is a new Digital Education Centre, located at the Ōtākou Marae, Portobello, Dunedin. The centre is managed by 3 part-time staff who facilitate the delivery of digital literacy programs and support services to Māori. The program creates opportunity through global citizenship and re-connection with Māori culture. Staff communication and collaboration are vital to the programme’s delivery and long-term success. The remote location of the centre and the part-time availability of the staff are potential barriers to the centre's long-term success.  Cloud-based project management software will provide the tools needed to maintain communication channels between staff members, enabling them to collaborate, develop programs, efficiently manage the centre, record participant progression and deliver a high-quality program.  Microsoft 365 provides a suite of applications that are widely used across all sectors. Free or substantially discounted subscriptions are available to non-profits, educators and schools. Whare tapere o hapori ao whānui is eligible to apply to Microsoft as a non-profit or as an education facility; applications to Microsoft should be prepared as soon as possible.  Microsoft 365 has the tools and resources required by Whare tapere o hapori ao whānui staff to communicate, plan, collaborate, track client progression and manage tasks. Applications are remotely accessible using web browsers or mobile devices and high capacity, secure cloud storage is provided.  Before deployment, set-up and testing of the applications, integrations and user accounts should be completed. This will ensure the end-user can seamlessly access the applications and fully utilise them. Microsoft provides access to free training resources and customer technical support; before deployment, staff must be provided with these resources. |  |

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| **Introduction** |  | The Dunedin City Council has partnered with the Te Rūnanga o Ōtākou Marae to support the creation of Whare tapere o hapori ao whānui, a community initiative that will operate in the digital education centre, which recently opened at the Ōtākou Marae. The Marae provides a vital opportunity for Māori taking part in the initiative to re-connect with Māori language, culture and tradition. Whare tapere o hapori ao whānui will provide a supportive and engaging learning environment where Māori can develop digital literacy skills and improve employment opportunities. Participants are provided access to computer equipment, digital literacy courses and free internet. Additionally, they will have access to social support services to address problems in the Māori community, such as poverty, poor health, poor mental health, lack of education, illiteracy and addiction. Whare tapere o hapori ao whānui will be managed and facilitated by three part-time staff; their role in the Māori community makes having access to a system which enables efficiency through collaboration and communication vital to serving the community effectively.  Dunedin City Council supports community projects through ratepayer funds allocated in its annual budget. Because funding needs to be used responsibly, Dunedin City Council is obligated to address any potential issues which may affect the long-term success of the project. Dunedin City Council has engaged the services of Phoenix Consultancy through a request for proposal dated 1 April 2020, seeking guidance on the selection and implementation of a project management (PM) system.  Phoenix Consultancy Ltd is a Dunedin based company which has 10 successful years’ experience within the IT field. In that time, it has successfully managed several Dunedin City Council projects and looks forward to aiding this important community initiative. |

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| **Objectives** |  | For clarity and consistency, Phoenix Consultancy has established the following criteria. **Project Management Software****Task Management**  * Users can assign and delegate tasks * Receive task-related notifications across connected devices * Status and progress updates * Sub-Tasks and Milestones * Due Dates * File Attachments * Messaging and Comments * Tracking the progress of a task * Tagging of a task for easy searching * Tasks per user and per project * Overview of past, overdue and upcoming tasks  **Communication and Collaboration Tools**  * Communications between staff are kept centralised   + Ensuring information is not lost and project progression is easily monitored   + Permanent records are available that will ensure the continuation of projects in the absence of team members * Secure, real-time communication   + Video and voice calling, instant messaging, tagging users into message responses or comments   + Email integration   + Chat feature * Message notifications * File storage and sharing * Shared calendars.  **Planning, Scheduling and Shared Calendar**  * Dashboard Feature   + Project dashboard or other such display option, which provides users with a high-level overview of the project   + Users can update themselves quickly on all project-related information   + All current tasks are displayed alongside overdue or newly assigned tasks   + The displayed information can be filtered according to user access permissions or preferences * Planning project tasks with set time allocation, milestones and sub-tasking.   + Monitoring time tracking to enable effective completion of tasks   + Allows for more accurate task planning in future * Client Management   + Users can access and update client records relating to training program progression   + Client templates for an easy onboarding process for new clients   + Flexible information viewing options.  **Security and Accessibility** Network availability is required for cloud-based services to be considered. Given the remote location of the Digital Education Centre at 25 Tamatea Road, Portobello, Ōtākou, Dunedin, Phoenix Consultancy has confirmed with network provider Chorus, that VDSL connectivity is available.  Figure 1: Broadband Access Checker Tool (Chorus, 2020)  A screenshot of a cell phone  Description automatically generated  Because Whare tapere o hapori ao whānui staff are part-time and the education centre is remotely located, providing staff remote access to data should be given priority.   * Remotely Accessible, Secure and Reliable Cloud-Based Service   + Secure file storage and sharing   + Access permission settings   + Automatic data back-up   + Cloud storage limitations versus capacity required * Client information is secure across all devices and applications * Users can log in through Android or iOS apps, Windows, Mac OS operating system or a web browser   + Allows communication and collaboration from any location or device * Office computer installations can be kept secured through login and inactivity log-out   + All changes are automatically backed-up to the cloud server.  **Microsoft 365 Integration** Digital Education Centre staff and participants are eligible for free access to the Microsoft 365 suite of applications.   * Integration with Microsoft 365 applications including Microsoft Outlook and Microsoft Teams could enhance productivity  **End-User Requirements**  * The application enables users to quickly and easily integrate it into their workflow * End-users are busy professionals with limited time available, therefore prior set-up will ease the process of learning and adopting the new application into the organisation’s workflow.   + The application account, including all individual user accounts, should be activated   + Office computers have the desktop application installed and tested   + Microsoft 365, Microsoft Teams and Outlook have available integrations enabled and tested   + User preferences and customisation options have been completed   + Remote access to the service has been tested for each user account. * End-users need to access information quickly and easily * Dashboard feature displays all the information the user needs   + Can be customised to the users’ needs or organisational role * Application is easy to access and has an interface that is easy to understand and navigate   + remotely accessible * Functions, features and custom options need to support user productivity * The application can adapt to suit individual needs and organisational change * Māori language integration or workaround options to include this * Access to training material and customer technical support * Intuitive application, ease of functionality with minimal training required |
| **Discussion** |  | 71% of respondents to KPMG's 2019 Project Management survey reported using a project management system software and 51% reported use of collaboration software applications to support projects (KPMG et al., 2019). The increasing popularity of these tools means the consumer has almost 900 software options available to choose from (Capterra, 2020). Project management software developers incorporate business solutions into the software, which varies between platforms and subscription options. Each offers something unique, but all will incorporate the same core functionality (Capterra, 2020):   * Task management * Communication and collaboration tools * Cloud-storage and file sharing * Project tracking and planning * Resource and time management * Time and expense tracking * Reporting |
| **Benefits of Project Management Software** |  | Project management software ensures project teams work collaboratively toward project targets and complete them on schedule. Teams will be kept up-to-date on all changes across the entire project alongside their workload. The PM system will ensure productivity and project success is not compromised through miscommunication or an inaccurate or incomplete account of progress. 77% of high-performing projects use project management software (Tavrizyan, 2019) and it is easy to see why this is the case. Successful project teams will collaborate, plan, manage resources and communicate. PM software centralises project information and workflow tools, enabling teams to better manage information, workload and streamline processes efficiently. This will help to prevent project failure through poor communication or misplaced information (Kerzner, 2017, pp. 549–551). |
|  |  | Figure 2: Impacts of Software on PM Functions (O’Loughlin, 2019)  Impact of software on project management function  Using PM software, teams will be able to remain in direct contact with one another through the messaging, commenting, voice and video calling features. This ensures all communications are kept centralised to a single workspace. Centralisation of data will provide all team members access to the same information. This will prevent workplace misunderstandings, save time, increase productivity and enable staff to work cohesively (CareerAddict Team, 2018). Collaboration tools enable users to communicate regarding specific tasks, documents or calendar events directly within the related item (Maria, 2020b). Project management software simplifies task management, enabling users to track progress, prioritise or delegate tasks or sub-tasks, set dues dates and keep the team up-to-date on task progression through to its completion (Maria, 2020a). Data input to the PM program streamlines planning processes. Information collected can be filtered, collated then presented in a clear, easily understood format which will help teams to make a well-informed decision when making necessary changes or developing plans for the future of the organisation (Miller, 2016). Access to the project team members calendars makes booking team meeting much easier and allows project managers to assess the current workload, and delegate if necessary (Maria, 2020b).  Centrally storing project data on a secure, remotely accessible storage service has several important benefits. Users can access information from any location, using any internet-connected device and their login credentials. This enables team members to input information, upload or edit documents. All changes are synchronised and made accessible to the project team. Storing data on a remote server reduces the risk of locally stored data being lost due to hardware failure (Maria, 2020b). |
| **Investment Considerations** |  | Functionality, price, customer support and ease of use are the top considerations when making a PM software purchase (Capterra, 2019). Providing end-users with new software featuring intuitive functionality through a user-friendly user interface, will make the process of integrating the software into the organisation's workflow easier, and increase user engagement with the tools and features provided. Software that unnecessarily overloads the end-user with complex functionality and user interface options, will affect user engagement with the software. This could require an additional investment of time to set-up the software before deployment and necessitate more advanced staff training (Donnelly, 2019).  **1. Cloud-Based Versus Local Software Installation**  Communications technology is rapidly advancing; nearly two-thirds of the world’s population is predicted to have internet access by 2023. There will be 5.3 billion internet users by 2023 (Cisco, 2020). Increased access to fast data speeds has enabled the global workforce to adopt remote work practices. Software developers have factored these changes into the development of their products. A 2019 Capterra survey showed that 60% of current PM tools are accessed from a cloud-based solution compared to 40% that use locally installed desktop solutions (O’Loughlin, 2019). Cloud-based technology facilitates team collaboration and communication seamlessly. Additionally, cloud-based applications are less expensive than the outright cost of the licensed software, offer greater flexibility for future expansion of the organisation and for collaborating externally (Kashyap, 2018).  **2. Microsoft 365 Application Integrations**  As businesses vary in structure and processes, they utilise a variety of software. These applications will often already be in use and need to be maintained. Software developers have incorporated the ability to integrate third-party software into their applications. Microsoft 365 and Google's G-Suite applications are common in most workplaces, schools and homes, and because these products are widely available, users will often need to integrate these. Integrations can be limited by a user’s service subscription. Some applications may provide free integrations but with capped usage.  **3. KPI Reporting Dashboards**  Cloud-based project management systems streamline data input and access. Changes to the information are immediately synchronised with the cloud-server, ensuring teams with permitted access have access to up-to-date information. Dashboards provide a collated version of up-to-date project information, specific to their needs in a clear, easily digested format. A team member will have specific roles in the organisation dictating the level of information access they require. Dashboard availability, custom features and access permission options are limited in free service subscriptions.  **4. Mobile Devices and Apps**  A high percentage of the population has access to a mobile or tablet device, consequently increasing consumer demand for mobile app versions of PM applications for Android and iOS devices. Apps for many project management systems are available to download for free, giving users a wider range of access options to streamline working remotely, collaborating, and communicating with the project team. Additionally, support for browser-based access is increasing - this is a vital consideration for users of unsupported mobile devices.  Figure 3. Global device and connection growth (Cisco, 2020)  A screenshot of a cell phone  Description automatically generated  Source: Cisco Annual Internet Report, 2018–2023  **5. Software Trial Periods.**  A high percentage of Capterra’s 2019 survey respondents reported using one or more trial versions of applications before purchasing full version software or a professional service subscription. A high proportion of respondents who did not use a trial version before purchase report abandoning the software within six months of deployment. The most common reasons for this were complex functionality that did not support productivity, and lack of customer support (O’Loughlin, 2019).  Most applications in the market will offer a free trial option to new customers. Trial period restrictions vary between developers. Most allow users access to all features for the duration, however, some may limit access to basic functions only. The period of the trials can vary from 2 weeks up to 90 days.  **6. Paid Subscription Versus Free Software**  Many developers of project management software offer free versions. However, these are limited in features, customisations, customer support and cloud-storage capacity. Software installed on local machines is more expensive than cloud-based software subscriptions as license cost is incurred for each machine on which the application is installed.  **7. Set-Up, Training and Technical Support**  To ease the adoption of the software into a user’s workflow, all software will require some set-up before deployment. A common timeframe for regardless of local or cloud-based access and free or paid subscription. |
| **Software Plans, Cost and Features** |  | **Asana.** Asana is primarily a task management tool. While Asana may not natively feature the range of popular tools and services provided in many project management applications, it is a very flexible option. Asana enables users to easily integrate the functionality they need from third-party applications such as Microsoft Teams. Tasks can be tracked easily through Asanas intuitive user interface, dashboard and custom viewing options which do not distract users with pop-up menus and options. Asana simplifies task management, enabling users to create, assign, delegate, re-schedule and track the progress of all tasks across the project. Users can also upload documents relevant to the task for others to access (Graw, 2019).  Figure 4. Asana Plans and Features (Asana, 2019)   |  |  |  | | --- | --- | --- | | Basic | Premium | Business | | Tasks management | Basic features plus: | Premium features plus | | Task assignees and due dates | Timeline & Progress View | Portfolios | | List, board and calendar project view | Custom dashboards, fields, forms and templates | Workload management | | Collaborate with up to 15 team members | Unlimited guest access | Custom rules builder | | Third-party app integration | Admin console | Approvals | | Status updates | Automation rules | Document proofing | |  | Task milestones | Lock custom fields | |  | Advanced search & reporting | Advanced application integration |   Figure 5. Asana Devices and Support (Capterra, 2018)   |  |  | | --- | --- | | Devices | Support & Training | | Install on Mac and Windows  Web Browser  Mobile – iOS and Android | Online Customer Help Desk Live Online Training Webinars  Documentation |   Figure 6. Asana Plan Options and Costs (Asana, 2019)   |  |  | | --- | --- | | Plan | Cost (AUD) | | Basic - Free | $0 | | Free trial 30 days full access to premium | $0 | | Premium, per user, per month, billed annually | $11.99 | | Premium, per user, per month, billed monthly | $14.69 | | Business, per user, per month, billed annually | $26.99 | | Business, per user, per month, billed monthly | $32.99 | | Non-Profit Discount Option Available for Premium and Business Subscribers. Applications Via: <https://asana.com/nonprofit> |  |  **Microsoft 365** Microsoft has recently begun a roll-out of changes to its Office application suite, which will be re-branded as Microsoft 365. As these come online, Microsoft 365 users will gain access to new features and integrations in Microsoft Teams, Microsoft Planner, Outlook, and Skype. Non-profit organisations, students and educators at eligible institutions can access Microsoft 365 free or at heavily discounted subscription cost. Applications include Word, Excel, PowerPoint, OneNote, OneDrive cloud storage and Microsoft Teams. Microsoft provides mobile app versions of the 365 applications and browser-based applications, enabling users to easily communicate, access documents and information remotely, and collaborate (Andre, 2020a).  Figure 7. Microsoft Plans and Features (Microsoft, 2019)   |  |  |  | | --- | --- | --- | | Business | Education | Non-Profit | | Microsoft 365 Business Basic | Microsoft 365 (A1) |  | | Microsoft 365 Business Standard | Microsoft 365 (A3) |  | | Microsoft 365 Business Premium | Microsoft 365 (A5) |  |   Figure 8. Microsoft 365 Devices and Support (Capterra, 2018)   |  |  | | --- | --- | | Devices | Support & Training | | Access and sync files on PC or Mac and mobile devices | 24/7 phone and online support | | 5 PCs or Macs, 5 tablets and 5 mobile devices per user | 99.9% financially backed service uptime guarantee | | Word, Excel, PowerPoint, OneNote for iOS, Android mobile devices |  | | Work on a file and save it directly to OneDrive or SharePoint; changes are updated across all synced devices. |  |   Figure 9. Microsoft 365 Plan Options and Costs (Microsoft, 2019)   |  |  | | --- | --- | | Plan | Cost (NZD) | | One-month trial available for Business Standard Plan | $0 | | Microsoft 365 Business Standard Monthly subscription, per user | $18.90 | | Microsoft 365 Non-profit Business Basic Free for eligible non-profit organisations | $0 | | Microsoft 365 Business Standard for Non-profits Monthly subscription, per user | $4.50 | | Microsoft 365 Education (A1) Free for eligible educators, students and schools | $0 | | Microsoft 365 Education (A5) Monthly subscription, per user | $5.20 |  **ActiveCollab** ActiveCollab combines project management, task management and collaboration tools into an easily used application packed with powerful features. End-users will experience a well-designed application that has an easily navigated user interface, that will not overwhelm and distract with unnecessary customisation options and difficult functionality. Nevertheless, this is a very configurable system that enables teams to plan with a high level of detail, assign, re-organise and delegate tasks, set milestones, track progress and help teams with time management. Details of overall performance across all projects and individuals within the organisation are easily accessible through the systems interface. Files can be uploaded and assigned to team members or tasks (Andre, 2020b).  Figure 10. ActiveCollab Plans & Features (Andre, 2020b)   |  |  | | --- | --- | | Cloud-Based | Self-Hosted | | Team Collaboration | Team Collaboration | | Task Management, Assignment, Recurring Tasks | Task Management, Assignment, Recurring Tasks | | Time and Expense Tracking | Time and Expense Tracking | | Calendar & Email Integration | Calendar & Email Integration | | File Management & Storage | File Management | | Collaborative Writing | Collaborative Writing | | Unlimited projects, tasks and time records | Unlimited projects, tasks and time records | | Desktop & mobile app  (Android and iOS) | Desktop & mobile app  (Android and iOS) | | Client management | Client management | | Advanced reports | Advanced reports | | Time estimates |  |   Figure 11. ActiveCollab Devices and Support (Andre, 2020b)   |  |  | | --- | --- | | Devices | Customer Support & Training | | Windows and Mac  Android and iOS Devices  Browser/Web-based Apps | Customers Contact Email  Support Phone Line |   Figure 12. ActiveCollab Plan Options and Costs (ActiveCollab, 2020)   |  |  | | --- | --- | | Plan | Cost (USD) | | A 90-day trial of cloud service currently available for a limited time.14-day trial available when this offer expires. | $0 | | Cloud service and self-hosted – per user/per month | $7 | | Total per month - 3 users | $21 | | Annual total for 3 users, monthly payment plan | $252 | | Annual subscription - per user | $75 | | Annual subscription - 3 users | $225 | | Self-hosted single payment incl. 1 year of support and upgrades | $999 | | Self-hosted support and upgrade renewal (per year) | $699 | | 50% discount available for approved non-profit organisations, schools and educators. Applications via:  <https://activecollab.com/non-profit-discount> |  | |

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| **Recommendations** |  | **Software Application**  * Microsoft 365 has the tools and resources required by Whare tapere o hapori ao whānui staff to communicate, plan, collaborate, track client progression, and manage important tasks through to completion. * Māori language is supported * Task management is provided using teams and planner applications * High capacity, secure cloud storage * access to free training resources and customer technical support * accessible using web browsers or mobile devices  **Implementation**  * Application required by Microsoft for non-profit or education subscription * Installation, set-up, and testing of all applications on local machines * Assistance for staff if needed, to remotely access data using mobile devices or home computers * Technical support following deployment  **Training**   * Training resource to be provided prior to deployment |

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