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Project Management Tool Overview | ClickUp Pilot

The following is an overview of Water.org's decision to pilot an advanced project management tool. This document covers the background and rationale the Project Management Office (PMO) used when deciding to bring on a new (paid) application, as well as benefits and implications of rolling it out more broadly to the organization.

Project Management Tool Pilot

Now that the PMO team is fully operational, it has been determined that a more robust project management tool for use with Organizational (Tier II) projects is needed. The OCOO allocated funds in the FY24 budget to cover expenses related to an application supporting a pilot program for testing a project management tool. In September 2023, the OCOO department began assessing project management tools with more advanced features and functionality than our current tools (MS SharePoint and MS Planner) could easily provide. The team solicited feedback from other departments with similar needs, and after evaluating several options, decided to move forward with a tool called "ClickUp". The team will use ClickUp to manage Organizational (Tier II) Projects in FY24 and plans to evaluate its suitability for permanent adoption by the end of FY24.

ClickUp Overview

ClickUp is a comprehensive project management application that serves as a versatile platform for teams and individuals to efficiently organize, collaborate, and track tasks. Offering a user-friendly interface, ClickUp encompasses a wide array of features such as customizable task lists, project timelines, document sharing, goal tracking, and team communication tools. Its unique flexibility allows users to tailor their workspace according to their preferred project management methodologies, whether it be Agile, Scrum, or Kanban. With a focus on streamlining workflow and enhancing productivity, ClickUp integrates with various third-party applications and provides seamless communication channels, making it a robust solution for teams of all sizes across diverse industries.

ClickUp Pilot Licenses

In FY24, the PMO is providing ClickUp licenses for staff participating in organizational projects (e.g. InteGreat, eLearning, Pre-Award and HRIS). These full licenses include "Business Plus" set of features and functionality for internal users with Water.org emails. Internal user licenses come with guest licenses that can be granted to external users (without a Water.org email address). All of the internal 24 licenses have been assigned and will be periodically reviewed by the Technology department to ensure license usage by the assigned users. ClickUp spaces inactive for over 30 days will transition to view-only access.

ClickUp Licenses Beyond

License requests beyond the initial subscription will be reviewed and vetted on a rolling basis by the Technology department for business necessity, cost, and proposed usage. We understand that various department teams may benefit from utilizing project management tools to manage department projects / tasks, and we want to carefully meet those business needs while keeping in mind that:

- ClickUp is still in pilot phase and may not be the final application used broadly within the organization. If a different direction is chosen for FY25, it may result in the need to migrate work away from ClickUp or add expenses for redundant licensing for an additional project management tool.
- Training and support will be needed to make sure new users engage effectively and fully benefit from the application.
- Each user license costs approximately \$190/year, which is expected to be covered using the requesting department's budget.

- The use of MS SharePoint and MS Planner is still encouraged to achieve some of the functionality required for simpler projects and task management.

License Request Process

Department leaders seeking ClickUp licenses are advised to evaluate specific criteria before reaching out to the Technology department via help@water.org:

- **Business need** – ensure that the project / initiative requires functionality that cannot be provided by MS SharePoint or [MS Planner](#) or a free (limited feature) version of ClickUp
- **Usage** – ensure that the user plans to actively use ClickUp throughout the fiscal year or during a specified period (after which the license can be deactivated)
- **Cost** – the business needs justify the approximate \$190/year expenditure per user
 - Consider if you need a team member to manage it and let the team view or if you would like to collaborate and invite all team members to access and edit

Roles and Responsibilities: OCOO and Project Management Office (PMO):

Team Lead, Operations:

- Approves PM tool.
- Provides onboarding services and PMO templates to Organizational Project teams.

Project Managers:

- Actively participate in the pilot, evaluating ClickUp's effectiveness in managing organization's project workflows.

Roles and Responsibilities: Technology Department Roles

Director of Technology:

- Manages access for all users.
- Ensures that ClickUp aligns with Water.org's data security and compliance standards.

IT Lead:

- Provides onboarding services and troubleshooting support to new users.
- Explores and implements integrations with existing tools.

Throughout the pilot, participants are encouraged to provide feedback on their experience with ClickUp. This feedback will be crucial in determining whether ClickUp meets the org's long-term project management needs.

For new license requests or assistance, contact the Technology department at help@water.org.