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The Essential Buyer's Guide for Project Portfolio Management (PPM)

This essential buyer's guide provides a business primer for Project Portfolio Management (PPM) and outlines the important buying criteria to help you select the best PPM solution for your business.

WHITE PAPER

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1. Project Portfolio Management (PPM): A Business Primer

Today, the business value that can be realized from PPM is far more than strategic alignment of investments, improved resource management, and visibility into business initiatives. Today's PPM solutions can help transform business execution and provide executives, stakeholders and project teams with new ways to collaborate and get work done more productively and effectively.

> ***"An appropriate PPM application should match some immediate functional needs and also support a successive road map toward improving PPM maturity."***
>
> Gartner 2010 IT PPM Magic Quadrant

1.1 THE BUSINESS VALUE OF PPM

If your organization is actively considering a PPM solution, you have likely reached the stage where disparate project, demand, resource, portfolio, and time management activities are leading to a lack of accountability and inefficient business processes. Common issues include ad-hoc or ineffective prioritization decisions, time-consuming data gathering for management reports, resource bottlenecks and lack of visibility into resource utilization, and inconsistent approaches to planning and managing projects.

Organizations that successfully improve their PPM processes and adopt a PPM tool realize most or all of the following business benefits:

- **Strategic alignment across project portfolios.** Aligning resources with strategic priorities is challenging for any organization, but by capturing all work across the company, both project-related and non-project work, prioritization and trade-off decisions can be made with full visibility into business impact. Avoiding low-value projects and "rogue work" is one of the major benefits an improved PPM process can deliver.
- **Better collaboration across organizational silos.** If a PPM process and tool is easy to use and adopt, it enables teams across organizational silos to collaborate. For instance, resource managers and project managers can better collaborate on project staffing, and finance can more easily provide regular updates on project costs. This broad adoption enables real-time visibility into project and portfolio status , thereby allowing executives and project managers to ensure business results are being achieved.
- **Improved decision-making and accountability.** A strong PPM solution will provide powerful business intelligence and reporting capabilities to enable a "single source of truth" for dashboards and reports. This enables more accurate and timely information for management decisions about project investments and which projects require more oversight and controls.
- **Streamlined PMO processes and templates.** Implementing an overall project

management framework, with just the basic phases and gates and a few key controlling artifacts (business case, project schedule, status report, etc.), enables a common streamlined process for the PMO while also enabling individual projects to select the right methodology for their project type.

- **Improved organizational productivity.** Utilizing a PPM tool enables a more predictable process to be implemented that eliminates unstructured data entry and management. In addition, a PPM solution should enable customization to ensure the tool matches the way your organization works.

These business benefits are clearly compelling and lead many organizations to implement a Project Management Office (PMO) or similar function. Unfortunately, Gartner Research estimates that PMOs have a failure rate of 50%[1] or more on their first try. The most common reasons for failure include neglecting to improve PPM processes *in parallel with* tool implementation and/or a lack of executive sponsorship. Hence, it's critical to find a vendor that can offer a combination of proven PPM expertise and a comprehensive, flexible solution that will lead to successful adoption in your organization.

1.2 INDUSTRY TRENDS SHAPING THE FUTURE OF PPM

There are a number of industry innovations that are addressing important business requirements to improve executive visibility, lower costs, mitigate adoption risk, and facilitate team collaboration. The key trends to consider when assessing a PPM solution include:

1. **Software-as-a-Service (SaaS).** Cloud computing is a major trend in the industry that is causing many organizations to take a "SaaS-first" approach to reduce cost and implementation risk. Costs are reduced because large upfront capital expenses for hardware and software are exchanged for a lower annual subscription. In addition, SaaS vendors are typically far more efficient at operating their services than internal IT organizations due to economies of scale and operational experience. Risk is reduced because SaaS implementations are usually faster to deploy and business value can be proved more quickly through a trial or proof-of-concept. Some traditional software companies now claim they can offer both packaged and SaaS offerings. Often these companies are only providing expensive hosted solutions which don't offer the cost benefits of a true multi-tenant SaaS provider.

> ***"Small PPM budgets, a need for a fast PPM deployment, and functions meeting immediate requirements (without invoking extensive process and behavioral change management) continue to drive the interest and need for SaaS-based PPM systems."***
>
> Gartner 2010 IT PPM Magic Quadrant

1 Gartner ITxpo, 2010.

2. **Web 2.0 and User Experience.** Many users of PPM tools now include business users and nontraditional project managers which underscores the need for usability. User interface design has dramatically improved in the last couple of years with the introduction of new "Web 2.0" technologies that require fewer mouse clicks and page refreshes. This, in turn, has aided the adoption of PPM solutions as users can experience the benefits of a PPM solution without a complex learning curve.

> ***"User experience for the nontraditional project manager is a high priority."***
>
> The Forrester Wave, PPM Q4 2009

3. **Business Intelligence.** Although business intelligence is not a new technology, its deep integration into PPM applications to provide a "single source of truth" and insight into project and portfolio activity is a recent trend. To provide sophisticated business intelligence a vendor must provide (1) a single data model, (2) seamlessly integrated PPM applications, (3) the ability to customize data fields and processes, and (4) easy-to-use report generation and customization.

> ***"Expect to see in the near term a revolution in reporting services, as providers begin to leverage more-advanced Web-based development technologies."***
>
> Gartner 2010 IT PPM Magic Quadrant

4. **Collaboration and Communication.** PPM solutions that enable real-time collaboration and communication provide significant business value for organizations. These capabilities not only improve team productivity, but also provide better executive visibility into project activity, status and risks. Collaborative features include document management, project workspaces, dashboards, newsgroups, blogs, wikis and team activity feeds. This is an important industry trend that will improve project execution as end-users become adept at using these new technologies.

> ***"Leveraging PPM as a lynch pin requires a robust integration plan."***
>
> "Breaking Out of the PPM Silo," Forrester Webinar 2010

5. **Integration to ERP Systems.** As more organizations grow and mature their PPM capabilities, integration to other corporate systems, such as ERP financial management or CRM, is becoming a common trend. Even if an organization doesn't need this capability initially, they should choose a vendor that can support integrations as and when they become required.

These industry trends should be factored into your organization's business requirements to provide a comprehensive framework to select a PPM vendor. In the next section, we'll look at business justification and ROI and common criteria organizations use to evaluate vendors.

2. Selecting the Right PPM Solution for Your Organization

> *"Simply stated, when it comes to project management, one size does not fit all."*
>
> PPM Tool Selection: Look Beyond Core Functions, Forrester, 2009

2.1 BUSINESS JUSTIFICATION AND ROI

Developing a business justification and ROI model for a PPM solution is an important step once the main business drivers have been identified. This process ensures executives have a way to measure the benefits of new PPM solution and can evaluate the ROI of the required investment. Presenting a compelling business case can also help securing budget approval from the CFO.

The Forrester Research Total Economic Impact™ (TEI) methodology provides one way to assess the ROI of a PPM solution. Common measurable benefits for a PPM solution include:

- Increased productivity through process standardization and automated reporting.
- An enhanced portfolio management process leading to improved decision-making and increased productivity.
- Cost savings due to reduction in internal IT support requirements.
- Savings through software license fees, server, and maintenance cost avoidance.
- Improved scalability for portfolio and project management initiatives.
- Increased accountability.
- Improved visibility and business focus through automated and enhanced reporting.
- Improved collaboration.

Other business outcome-based benefits can also be estimated, including:

- **Reduction in the number of non-strategic projects.** Reducing the projects that are not aligned with strategy or are unnecessary, and therefore erode the value of the overall project portfolio.
- **Improvement in resource utilization.** Improving the percentage resource utilization against billable targets due to better resource management and visibility.
- **Reduction in cost overruns.** Improving the ability to avoid cost overruns due to poor estimation, scheduling, and lack of project visibility.
- **Reduction in project failure rate.** Reducing the percentage of projects that fail to deliver business value due to budget, schedule or cost overruns, or failure to deliver on business requirements.
- **Reduction of project delivery times.** Reducing the time it takes to complete a project due to more efficient project methodologies and improved project visibility to make decisions.
- **Reduction in administrative time.** Reducing the administrative time to collect project data and manually build status reports.

A recent Forrester survey found PPM tools improved these business outcomes by 10%-25% depending on the organization. Even though your projected ROI will be based on assumptions and estimates, this exercise will typically generate a valuable dialog with executives and stakeholders around the business justification for a PPM solution.

An example of a Total Economic Impact™ (TEI) evaluation is available on the Daptiv website which concluded that the risk-adjusted ROI of Daptiv was 143% with a breakeven point (payback period) of less than two months after deployment.

2.2 ASSESSING YOUR ORGANIZATION'S PPM MATURITY LEVEL

Many PPM implementations fail because an organization selects a tool that is too complex or too simplistic for their needs. The key is to select a vendor with the right combination of tool and services that meet your organization's current needs and is flexible enough to evolve as you progress along the maturity curve. The following table will help you assess your current maturity level and associated tool needs.

	Level 1 Ad-Hoc	Level 2 Emerging	Level 3 Managed	Level 4 Integrated	Level 5 Optimized
Process / Organization	▪ Reactive project selection process ▪ No consistent PM framework across projects ▪ Basic budget estimates/tracking ▪ Resource bottlenecks ▪ Limited risk mitigation ▪ No portfolio mgmt	▪ Standard PM framework implemented ▪ Project prioritization against strategy ▪ 'Bottom-Up' resource mgmt ▪ PMO created ▪ Project costs/hours	▪ Cyclical project intake process ▪ PMO roles well-defined ▪ Emerging EPMO ▪ 'Top-down' resource planning ▪ Portfolio analysis/ monitoring ▪ Value-based estimates ▪ Chargeback/ financial integration	▪ Organization-wide PPM processes ▪ EPMO/multiple business unit PMOs ▪ Portfolio results actively tracked ▪ Center of Excellence ▪ Resource mgmt optimized ▪ Integrations to enterprise systems	▪ Innovation-centric PPM processes ▪ EMPO owns strategy/project execution ▪ Sophisticated financial mgmt ▪ Role specialization/ career paths ▪ Enterprise-wide frameworks/best practices
Tools	▪ Uncoordinated spreadsheets ▪ MS Project	▪ Resource mgmt ▪ Project workspaces ▪ Exec dashboards ▪ T&E Tracking ▪ Standard project templates ▪ Simple configuration ▪ Single data store ▪ Business intelligence (BI) reporting	▪ Resource 'what-if' analysis ▪ Portfolio analysis ▪ Configurable processes/workflow ▪ Enterprise administration ▪ Advanced BI ▪ Integration to ERP/ CRM	▪ Advanced financial management ▪ Advanced risk analysis/modeling ▪ Portfolio modeling ▪ Custom development	▪ Integration to enterprise knowledge-management

2.3 VENDOR SELECTION CRITERIA

Once the business justification has been approved, an organization will typically develop a Request for Information (RFI) and/or a Request for Proposal (RFP) to solicit information from vendors as part of the selection process. Both an RFI and RFP will contain the following information:

1. Summary of business problem and solution required

2. Vendor selection process and instructions for responding

3. Information requests based on specific criteria and stage of selection process.

For a PPM tool, the selection criteria can range from 50 to 250+ items across a number of dimensions. It's important to outline the critical business needs to determine the key dimensions and assign appropriate weighting for the scoring model.

Deciding What Is Important

We recommend ranking the 5–10 critical success factors for your organization and mapping these to the selection criteria to guide development of the vendor comparison matrix. For instance, some example critical success factors and selection criteria could include:

Critical Success Factor	Selection Criteria
1. Implement a project intake process to prioritize and select strategic projects	▪ Core PPM Functionality: Portfolio Management, Project Intake ▪ Professional Services / Support: PPM process consulting
2. Successful adoption by project teams	▪ Usability: Simple, intuitive web-based interface ▪ Technology: Software-as-a-Service delivery
3. Real-time executive reporting / visibility into project and portfolio status	▪ Business Intelligence: Dashboards and Views ▪ Business Intelligence: Single data store
4. Ability to tailor PPM solution for existing and new business processes	▪ Functionality: Import spreadsheets / project templates ▪ Configuration: Easily add custom data fields ▪ Configuration: Configure new processes ▪ Business Intelligence: Build role-based reports and views
5. Improve PPM process maturity from Level 1 to Level 3	▪ Customization: Solution templates ▪ Professional Services / Support: PPM best practices web-based training
6. Reduce administrative overhead for reporting and data visualization	▪ Business Intelligence: Single data store ▪ Business Intelligence: Build role-based reports and views ▪ Usability: Simple interface for creating reports
7. Improve collaboration / communication between project teams	▪ Core PPM Functionality: Project workspaces ▪ Core PPM Functionality: Workflow
8. Improve resource planning and utilization	▪ Core PPM Functionality: Resource Planning

Agreeing on the critical success factors will help prioritize the important aspects of a vendor evaluation, such as usability, customization / flexibility, business intelligence and professional services, which can significantly impact the success of a PPM initiative.

Developing a Vendor Comparison Matrix

An example vendor comparison matrix is included in Appendix A. This matrix is not intended to be exhaustive, but includes the frequent selection criteria and dimensions utilized by organizations. If the scores are close for 2 or 3 vendors, reviewing qualitative feedback and revisiting the critical success factors can be useful to make the final selection.

3. Evaluating Daptiv PPM

Daptiv has helped thousands of companies improve their strategic planning and business execution with its industry-leading PPM solution and expert professional services. Daptiv's customers include world-class organizations such as BASF, Chase Paymentech, Harvard University, Honeywell, La Poste and Virgin Australia.

We would welcome the opportunity to discuss your business needs and demonstrate our unique approach to PPM. Specifically, we would be happy to provide:

1. A business requirements discussion with one of our PPM experts

2. Solution demos tailored to your requirements

3. A comprehensive response to your RFI or RFP

4. Customer references on request

Next Steps

Please contact one of our solution specialists at +1-888-621-8361 or request more information at http://daptiv/contact.

4. Appendix A: Sample Vendor Comparison Matrix

This sample vendor comparison matrix contains 8 dimensions and 100+ criteria. Dimensions and criteria should be added or removed based on your business requirements. Each vendor receives a score between 0% and 100%. To complete the matrix, complete the following steps:

1. For each dimension, assign a weight based on importance. The total for all dimensions should equal 100% (see the grid below for an example).
2. For all criteria in the vendor scoring matrix, assign a score based on the following:
   - Criteria completely met (4 points)
   - Criteria completely met with configuration (3 points)
   - Criteria partially met (2 points)
   - Criteria completely met with software customization (1 points)
   - Criteria not met (0 points)
3. Calculate the maximum score for each dimension by multiplying the number of criteria in a dimension by 4. For instance, if the business intelligence dimension has 8 criteria, the maximum score is 32. Total the scores for criteria in each dimension and divide by the maximum score to give a percentage score for a dimension. For example, if a vendor scored 16 in the business intelligence dimension, the percentage score would be 16/32 = 50%.
4. Transfer the percentage score for each dimension (S) to the summary table and multiply by the weight for each dimension (W) to calculate the total column (W*S). Sum the Total (W*S) column for the final vendor percentage.

Sample Vendor Scoring Summary

Dimension	Weight (W)	Score (S)	Total (W*S)
1. Core PPM Functionality	30%	88%	26.40%
2. Business Intelligence	15%	92%	13.80%
3. Configurability / Flexibility	10%	98%	9.80%
4. Usability	10%	85%	8.50%
5. Pricing	10%	90%	9.00%
6. Professional Services and Support	10%	85%	8.50%
7. Vendor Qualifications	10%	100%	10.00%
8. Technology	5%	85%	4.25%
		Final Vendor Score	**90.25%**

Sample Vendor Scoring Matrix

Dimension	Criteria	Score	Notes
1. Core PPM Functionality			
1.1 Portfolio Management			
	Create user definable portfolios		
	Group related projects by any portfolio attribute		
	Associate projects to the organizational structure (business unit, division, etc.)		
	Roll up budgets and costs		
	Show budget impact of proposed projects against a target portfolio budget		
	Show impact of proposed projects on resource capacity		
	Automate proposal approvals		
	Support rating criteria based on strategic goals		
	Vary strategic goals by organizational unit		
	Create tailored scoring models based on customer specific criteria to prioritize, align and compare projects and/or project requests		
	Ability to configure tailored scoring models		
	Map projects to corporate objectives		
	Allow for project classification, filtering, and sorting by type and other characteristics		
1.2 Demand Management / Project Intake			
	Create web forms allowing for licensed or non-licensed users to submit project requests/ proposals		
	Create and track project requests / proposals outside of a project workspace		
	Ability to add reviewers ad hoc to project requests / proposals		
	Ability to estimate resource labor costs and revenue potential at the project request/proposal stage		
	Ability to expose or hide configurable fields in the project request form		
	Ability to enable and automate approval orders and notifications		
	Support “proposed” projects not yet approved		
	Support customized forms (e.g., new project request, change request, etc.)		
	Project request review and approval		
	Attach documents to project request		
1.3 Resource Management			
	Skill inventory and tracking		
	Track billable and labor cost rates		
	Provide standard role-based billing rates		
	Track allocation (top-down), schedule (bottom-up) and actual time for individual and teams		
	View resource allocations and schedules across projects		
	Instantaneous what-if analysis on resource supply and projected demand		
	Provide the ability to tailor billing rate categories with rate schedules		
	Forecast resource requirements by role at either the project request/proposal stage and/or at the project workspace.		
	Forecast resource availability for named or generic resources		
	Automated resource utilization calculations for individuals and roles		
	Provide online resource requests (by role or individual) to a resource manager		
	Provide the ability to define and separate resource teams by resource manager(s)		
	Provide flexibility and functionality to support both an approval driven resource request and allocation process and/or a more casual approach to invite project members		

Dimension	Criteria	Score	Notes
	Map users to organizational workgroups		
	Capture contact info in resource profile		
1.4 Project Management			
	Timeline views grouped by projects/ clients/portfolios or any project/portfolio attribute		
	Planned vs. actual summaries		
	Milestone Summaries		
	Dynamic Project Gantt charts		
	Team member calendars		
	Define/maintain task dependencies within the project or across other projects		
	Summary tasks automatically roll up subtask data		
	Two way sync with MS Project		
	Ability to define, track and manage non-project work time categories		
	Ability to create non-working day categories and applying to company-wide work week calendar(s)		
	Ability to relate project plan artifacts (tasks, issues, documents, risks, expenses, or any tailored project item) between each other		
	Ability to bulk edit tasks including custom fields in a grid like fashion with an intuitive interface		
	Ability to copy/move/paste tasks within projects and/or between projects		
	Provide hierarchical task plan/WBS with target and actual delivery dates		
	Permit any project plan to become a template		
	Manage task dependencies		
	Support task constraints		
	Assign multiple resources to a task		
	Provide security permissions for tasks		
	Notify resources via email when assigned to a task		
	Allow permissions to distinguish project members by role to manage (create, edit, delete, view, update) projects, tasks, issues, documents on a project by project basis		
	View and report tasks for a resource		
	Provide printable Gantt chart views		
1.5 Issue / Risk Management			
	Manage issue lifecycles		
	Associate issues, risks or action items to any other items, including to a project or a task		
	View, report, and track issues across projects/programs		
	Assign issues to individuals		
	Notify assignee/ PM or any other project role by email when issues are created, assigned or completed		
	Allow conditional rollup of issues and risks to drive project status indicators		
	Include link to the issue in an automated email		
	Permit non-assigned issues to be viewed only		
	Drill up from the issue to the project or task		
	Drill down from the project or task to the issue		
	Categorize issues (i.e.: issue “types”)		
	Permit user-defined probability and impact levels (risks only)		
	Ability to weight issues and risks with tailored scoring models to measure impacts		
	Report a single project’s issues and risks		
	Support issue and risk reporting across a portfolio or group of projects		

Dimension	Criteria	Score	Notes
	Provide custom fields in both issues and risks		
	Capture project action items with due dates and ownership		
	Capture project decisions with decision date and responsibility		
1.6 Time and Expense			
	Provide intuitive, easy to read time sheet		
	Record time at the project level, task level or non-project work level		
	Record time and update notes at the assigned tasks only		
	Automatically route timesheets to project managers and final approvers for approval		
	Capture notes on each time entry; report notes on time reports		
	View, edit and approve time and expenses		
	Report and define notifications triggered by timesheet states (e.g. reminders, edits delinquent)		
	Allow flexibility for team members to manually update % complete or have % complete automatically calculate.		
	Allow Team members to enter in Estimate to Complete which will automatically recalculate the % complete		
	Allow managers to override recorded task % complete		
	Only approved timesheet entries update task schedules		
	Timesheet entries automatically update task schedule		
	Report billable vs. non-billable work		
	Resource can add non-working time (e.g. vacation) to timesheet		
1.7 Project Team Collaboration / Document Management			
	Ability to provide a configurable, project-specific home page to serve as a centralized, real-time source for project team collaboration, document sharing and project milestone tracking		
	Select events that trigger notifications which can be preserved from projects started from templates		
	Permit personalized notification rules		
	Enable sending news to team members		
	Easily identify unread items		
	Post replies or update notes with notification capabilities within discussion threads, tasks, issues, documents		
	Upload documents in a centralized repository by definable folder structures with check-in/check-out, version control, locking and event history log capabilities		
	Include documents in project templates		
	Relate document with any other project item (tasks, risks, issues, other documents, projects)		
	Provide document approval routing		
	Add custom attributes/fields to categorize documents		
	Notifications get routed to e-mail address		
	Ability to perform search for documents only		
	Ability to search for text within documents		
	Ability for subscribers to manage documents using Windows Explorer		
1.8 Financial Management / Budgeting			
	Provide top-down budgeting where financial targets and goals can be identified at the portfolio and/or project level		
	Provide top-down budget cost and revenue forecasting of labor effort and expenses		
	Provide bottom-up estimates of hours, costs and revenue		
	Report actuals for hours, costs and revenue		
	Report project finances by task, phase, milestone, project, program, account, etc.		

Dimension	Criteria	Score	Notes
	Provide project-to-date reporting		
	Report earned value		
	Distinguish between capital and non-capital costs on a project		
	Rollup sums, min, max, averages, differences in real time within views and/or reports		
	Exchange and integrate financial information with ERP systems		
	Capture invoice information and exchange data with other financial packages		
	Track budget planned and actual spend over a period of time		
	Expense reporting		
1.9 Integration			
	Web Services Application Program Interfaces (APIs)		
	Prebuilt integrations to major ERP / CRM systems		
	Customized Integration Options		
	Synch tasks and import appointments with Microsoft Outlook		
	Two way sync with MS Project (incl. import/export .mpp)		
	Import/export project data with Microsoft Excel		
	Active Directory/LDAP integration for user management		
	Single sign on capability		
1.10 Administration and Security			
	Control functions, access and permissions by role, i.e.: Admin, Resource Manager, Project Manager, Team Member		
	Allow for limited functional use subscription		
	Provide audit trails		
	Simple wizard driven enterprise configuration		
	Support localized languages		
	Provide IP Filtering to control user access based on customer definitions		
	Capability to define different project types that can be separated and distinguished from each other with roles based access		
	Role-based security model		
	Project-based security model		
	Enterprise/organization based security model		
	Item level permissions		
	Total		Max Total=
2. Business Intelligence			
	Provide user-specific, configurable, real-time dashboards		
	Summarize financial information for organization, department, account, program, etc.		
	Drill down to details from dashboards		
	Track and report status of portfolios		
	Track and report project health with project status reports		
	Provide traffic light indicators or similar on dashboards		
	Track and report project pipeline, backlog, completed projects, etc.		
	Provide project views of resource requirements		
	Provide departmental views of resource requirements		
	Map projects to corporate objectives		
	For each project or proposal, show degree of alignment, business value, benefits, etc.		
	Report financial forecast and actuals by date range		

Dimension	Criteria	Score	Notes
	Report resource forecast and actuals by date range		
	Report spending patterns across different types of projects		
	Provide reporting capabilities for realized post-project value		
	Provide ad-hoc reporting and queries		
	Provide ad-hoc graphical reporting and queries		
	Enable permissions to allow any user to create their own reports or views		
	Allow permission to publish dashboard reports to other roles		
	Filter data on user-definable criteria		
	Provide wizards for writing basic reports		
	Export all reports to Excel, TXT or HTML for off-line analysis		
	Ability to deliver reports via a variety of vehicles e.g. roles-based dashboards, PDF, XLS, html, xml, email attachments		
	Total		Max Total=
3. Configuration / Flexibility			
	Pre-built solutions templates including best practice reports, dashboards, views, scoring models and project plans		
	Simple wizard driven interface configuration that is not bound by generic product defined business rules and designed for a business user to configure		
	Ability to configure project types and project request types that can be distinguished and separated from each other with custom fields, applications, roles, reports, views		
	Ability to create custom fields / applications		
	Single data model to enable reporting across standard and custom applications		
	Define custom notifications / workflow		
	Ability to create templates based on project types		
	Role-based views (executive, project manager, team member, client, etc.)		
	Total		Max Total=
4. Usability			
	Simple, intuitive web-based interface		
	Provide context sensitive online help		
	Provide user and/or roles-based customizable views of project data		
	Provide user and/or roles-based customizable views of personal home page		
	Search across all objects or by object type		
	Provide centralized administration - User ID's, password resets, etc.		
	Include links to data in email notifications		
	Provide wizards for creating new projects and/or project requests		
	Ability for non-subscribers to create project requests		
	User level currency and language selection		
	Easily sharable with business and collaborate with customers / partners		
	Segregate projects so tool is usable by many groups across the enterprise		
	Ability to re order, move, copy/paste, bulk edit, bulk update project tasks		
	Total		Max Total=
5. Professional Services / Support			
	Implementation methodology and process		
	Quick Implementation timeframe		
	Range of best practices services		
	Solutions consultant's experience		

Dimension	Criteria	Score	Notes
	Solutions templates		
	Provide web based training		
	Offer on-site training; support for train-the-trainer methodology		
	Unlimited free technical support for each subscriber during business hours via web portal, email and telephone		
	Option for a dedicated technical support account manager		
	Post implementation optimization and/or coaching services		
	Offer after-hours support		
	Provide an SLA for support response times		
	Community forum and product feedback center		
	Online knowledge base		
	Total		Max Total=
6. Pricing			
	Pricing for a X user deployment		
	Pricing for implementation services		
	Pricing for training and ad-hoc services post implementation		
	Total		Max Total=
7. Vendor Qualifications			
	Financial viability, including profitability / cash flow		
	Vision and strategy		
	Standard terms and conditions		
	Executive management		
	Number of years in business		
	Size of customer base / subscribers?		
	International presence		
	Customer references		
	Total		Max Total=
8. Technology			
	Uptime statistics for past 24 months		
	Provide documented technical architecture diagrams		
	Security and ISO 270001 certification		
	Provide documented Disaster Recovery Plan		
	Provide up-time guarantees (e.g. 99.7%)		
	Use Akamai or similar caching technology to reduce latency		
	Regular release schedule		
	Server redundancy to support the business continuity plan		
	Off-site storage of tape backups		
	Total		Max Total=

daptiv™

ABOUT DAPTIV

Founded in 1997, Daptiv is the leading provider of on-demand Project Portfolio Management (PPM) solutions. Daptiv has helped thousands of companies improve their strategic planning and business execution by offering flexible PPM solutions and expert professional services. Daptiv's customers include world-class organizations such as BASF, Chase Paymentech, Harvard University, Honeywell, La Poste, and Virgin Australia.