WEBCAST HANDOUT: "Finding Project Management Software for Your Lean Six Sigma Projects"

Questions to Consider

1. **Planning**
   - What are the key drivers for implementing a new project management system?
   - What new capabilities are we hoping to achieve?
   - What capabilities were valuable in the old system that we need in the new system?
   - Given these needed capabilities, what features are most important?

2. **Searching for Options** *(Suggest gathering about 7 software options.)*
   - Take a look at a variety of options from various providers including MoreSteam.com's online project management system, TRACtion®.
   - Use online feature lists available on the product web pages to make sure the products have the minimum requirements.
   - Sign up for Demos and Webinars before working through a formal evaluation.

3. **Features important for Lean Six Sigma Projects:**
   - Project Charters
   - Roadmaps (Workflows)
   - Task Tracking (Gantt Charts)
   - Toll Gate Management
   - Financials
   - Reporting
   - File Storage
   - Discussion Boards
   - Team Member Management
   - Time Tracking

4. **Evaluating Options** *(Evaluate 3 options by actually working in the software with a sample project.)*
   - Why was this project management system developed? For example, was it originally designed for general projects, marketing/sales teams, or can it be used for process-improvement projects?
   - Does it offer all the features important for Lean Six Sigma projects?
   - Is the product focused on the needs of an Enterprise?
     - Does it have reporting capabilities?
     - How does the product handle certifications?
   - Can features of the product be customized to make it work for our business? Are there settings so it can be customized business unit by business unit? Project by project?
   - Who uses this product? Can you talk with them to understand their experience?

5. **Pilot: Working with your Vendor**   (1 option)
   - What training is available to support the software?
   - Do they help with the initialization of the instance and do they continue support after launch of product, deployment wide? How is support provided? When is it available?
   - Can you talk directly with developers about additional needed features?
   - What sort of relationship does the vendor have with Enterprise customers in the ongoing evolution of the product over time?

6. **Pick the product that meets the needs of the enterprise, the deployment and your users.**