

Checklist: How to Choose the Best Project-Based Management System for Your Consulting Firm

Use this checklist to keep you thinking holistically about what the “right” solution will look like. Start with a documented understanding of your firm’s current processes (beyond basic accounting) to factor in steps from business development all the way through to project delivery.

- ☐ Define the primary and secondary business and project challenges you want to address with your system.
- ☐ Describe the metrics you need to capture for individual projects. Define where that detail is captured from and what kind of additional data is needed.
- ☐ Decide how you’ll need your project-based system to deliver information. Determine how easily it will serve your typical and recurring reporting needs (i.e., % utilization, % completion, % budget, etc.).
- ☐ Determine if the system allows you to consolidate and review multiple projects for a single client, or across multiple clients.
- ☐ Decide how far into the future you need to be able to plug and forecast client, engagement and firm data, and make sure your system and processes support it.
- ☐ Make sure the system has capacity to meet immediate needs and expand as needs grow in the future. Is it flexible enough to support an evolving firm?
- ☐ Check to make sure your technology provider has a track record of innovation and improvements, to user interface and other functions.
- ☐ Find out the upgrade cycle, and how quickly bugs are addressed.
- ☐ Define what additional features are in the works that would support your processes.
- ☐ Catalog what features and functions are plug-and-play, and which ones require customization on your dollar.
- ☐ Make sure the provider has a generous and reliable support offering.
- ☐ Find out how much support you will want/need to customize and implement the platform you choose.
- ☐ Define with your provider how the support function will work – including stated standards for responses.
- ☐ Of course, be sure to check references whose experience most closely resembles yours.



Ready to take the next step?

How Consulting Firms Win: The Definitive Playbook For Exceptional Project Delivery, Growth, Profitability and Talent

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