



**BUSINESS  
COMPLEXITY  
SIMPLIFIED**

Beware the  
Consultant: A Better  
Way to Select  
the Right Project  
Management System

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*"Once a new technology rolls over you, if you're not  
part of the steamroller, you're part of the road."*  
**Stewart Brand**

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## Project Management Software Usage Slow But Increasing

An increasing number of companies recognize that a strategic investment in project management (PM) systems software can improve employee productivity and overall financial performance. However, the adoption rate for such software remains low, estimated at between 31% and 36% as recently as 2023.

## Helping An Organization Make the Right Choice

While a growing number of PM systems are available, the optimal choice for a company depends largely on the nature of its business and operations. In our experience, starting the selection process by focusing on specific needs and existing competencies boosts confidence when making that critically important decision.

For example, we worked with a growing financial services company that lacked practical PM tools or systems. Concerned that this presented an obstacle to future growth objectives and employee productivity, and recognizing the lack of internal PM technology expertise, leadership decided to turn to an outside consultant to help them identify and implement the PM system that best served their business requirements.

The company's original intent was to combine the PM vendor selection and system implementation phases into a single project, but BCS Consulting recommended pursuing the selection and implementation as separate projects (although that meant BCS might not be engaged for both).

We'll explore the reasoning for that recommendation and how it allowed for successful delivery of both projects in this white paper. In addition, we'll suggest points to consider when selecting an external consultant to support plans for new PM systems.

## Consultants Are Often Biased

As the marketplace for PM systems grows, it's evident a consultant cannot have extensive experience with all of them. Given human nature, it's likely that consultants may acquire a bias toward systems that are comfortable and familiar. Unfortunately, what's best for a consultant isn't necessarily the optimal choice for their client. When selecting a client, companies should be alert for signs of a bias toward a particular platform.

Consultants also tend to be biased toward their core strengths, such as their technology or project management expertise. Again, the choice should focus on what's best for the company, so consultants need to understand both the company's core business and the challenges it faces. A consultant that appears to be more focused on the technology or a desire to reach a decision quickly probably isn't putting the company and its challenges first.

## SOLUTION: Beginning the PM System Selection

Armed with basic knowledge of the client's functionality requirements, BCS developed a list of potential vendors. To narrow that list, our team then created a detailed assessment methodology

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built upon the company's unique business requirements. The methodology included four phases:

1. **Requirements.** Our team began with a comprehensive review of all publicly available materials (primarily from the client's public-facing website) to confirm understanding of the client's business and business challenges. Before the next steps, we submitted a detailed list of questions and additional material requests to help us prepare.

Next, we performed a series of client interviews, meetings, and workshops -- and collected and reviewed additional artifacts -- to deepen our operational knowledge and ensure the requirements being developed would be comprehensive and complete. From these steps, we prepared a detailed written requirements document, then reviewed and validated it with the client to make any needed adjustments (see PM System Requirements document in Appendix). Beyond the stated goals of growth support and higher productivity, the document identified these high-level must-have needs:

- Simplistic design and ease of use
- Minimal administration requirements
- Robust self-paced user training
- Project dashboard for external customers
- Hybrid project methodology support
- Box.com and Salesforce integration

These requirements were realistic given that the company would begin with five users, growing to ten within two years. In addition, the company had a well-documented project methodology that could be easily migrated from the spreadsheets they were using. After BCS completed the initial requirements document, we held a workshop with the client's core project team to perform a detailed review of the document and fine-tune it as needed.

2. **Research.** Once the client approved the requirements document, we began detailed research on vendors that might meet the requirements. To simplify the process while keeping it objective, we used Microsoft's CoPilot Pro AI platform to identify 14 potential vendors deserving of a closer look.

We created a detailed scoring spreadsheet to score and rank each vendor against the requirements, along with a worksheet summarizing all vendors (see PM System Vendor Scoring Example in Appendix). Scoring involved manual review with additional insight from CoPilot Pro.

For PM systems selection efforts that are larger in scale, technically complex, have extensive business requirements, or are required by internal procurement policies, companies might choose a more involved RFI/RFP process, but for this client, the approach we recommended involved significantly less time and expense.

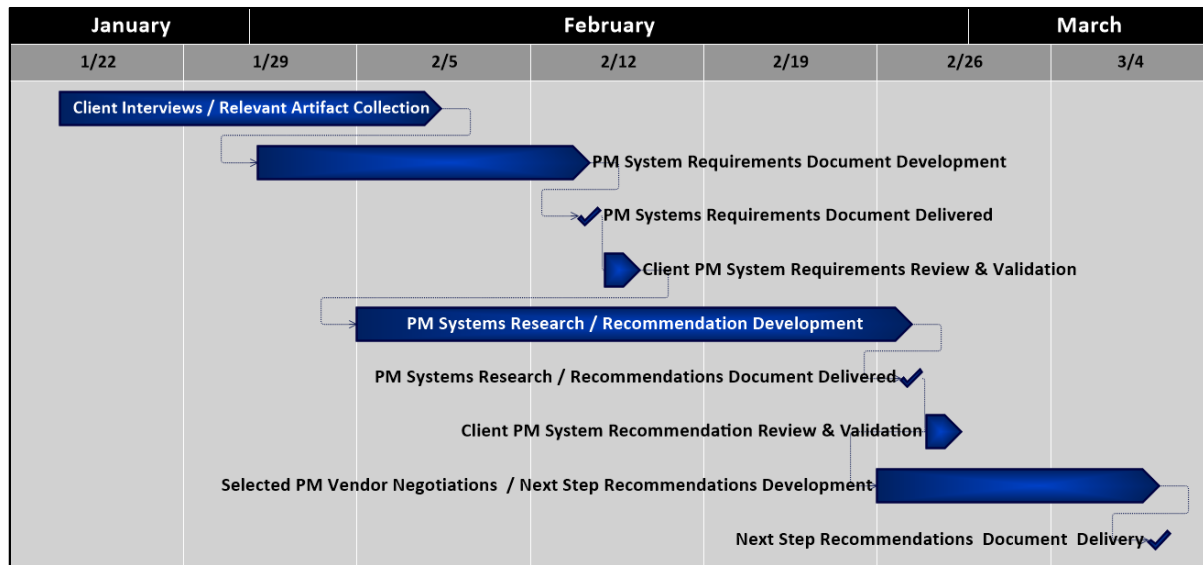
3. **Recommendations.** We discussed the recommendation with the client and had conversations with the four top-ranked vendors before narrowing the vendor list to two finalists. One was recognized as the primary, while the next was held as a backup in case final negotiations were unsuccessful.
4. **Selection.** With the client's full approval, we contacted the selected vendor to address any remaining questions before we could begin the implementation project. In addition to application functionality questions, vendor discussions focused on software license pricing, along with vendor implementation resources and support.

## Beware the Consultant: A Better Way to Select the Right Project Management System

This approach allowed the client to choose the ideal PM system regardless of the consultant's experience bias. It also provided everything the client needed to begin the implementation project, including potential resources to lead the implementation project if they wished.

### Selection Project Timeline

The entire PM selection process took just over six weeks to complete. When preparing a project timeline for this type of selection, it's critical to consider the system scale, requirements complexity, number of business processes being implemented, and procurement policies. Increasing the scale, requirements complexity, number of business processes or adding an RFP/RFI phase will lengthen the duration and complexity of any PM selection project plan, making it imperative that the consultant is experienced in implementing systems of all sizes, requirements complexity, and business processes and has done so using an RFP/RFI phase.



### SOLUTION: PM System Implementation Project

Although BCS had extensive hands-on experience with a wide range of project management systems and platforms, we had no direct experience implementing the selected system, Monday.com. This was not a cause for concern, as Monday.com's product appeared simple to learn, configure, and implement. Because the client believed knowledge and understanding of their business model and operations were critical to a successful implementation, they decided to retain BCS instead of a consultant with Monday.com experience.

BCS adapted its normal implementation methodology to address the client's unique must-have requirements and leveraged Monday.com's project methodology recommendations. While the implementation was successful, the original baseline was adjusted to match the availability of client resources. The implementation project included the following phases:

1. **Account Setup/Initial System Configuration.** High-level deliverables for this phase involved final licensing arrangements/payment, initial account setup, initial planning meetings, and creating user accounts for the core project team. We created and managed the implementation project using Monday.com to facilitate engagement and learning by the core project team.
2. **Discovery/Business Process Workflow Development/Self-Paced Training.** We executed a comprehensive analysis of the client's existing customer engagement processes and supporting

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documentation, based on the requirements from the system selection project. This discovery process also included on-site workshops to ensure BCS fully understood the business requirements and challenges. We moved the client's primary business processes into Monday.com based upon system workflow and automation configurations. Periodic client reviews of the workflow allowed us to fine-tune the configuration.

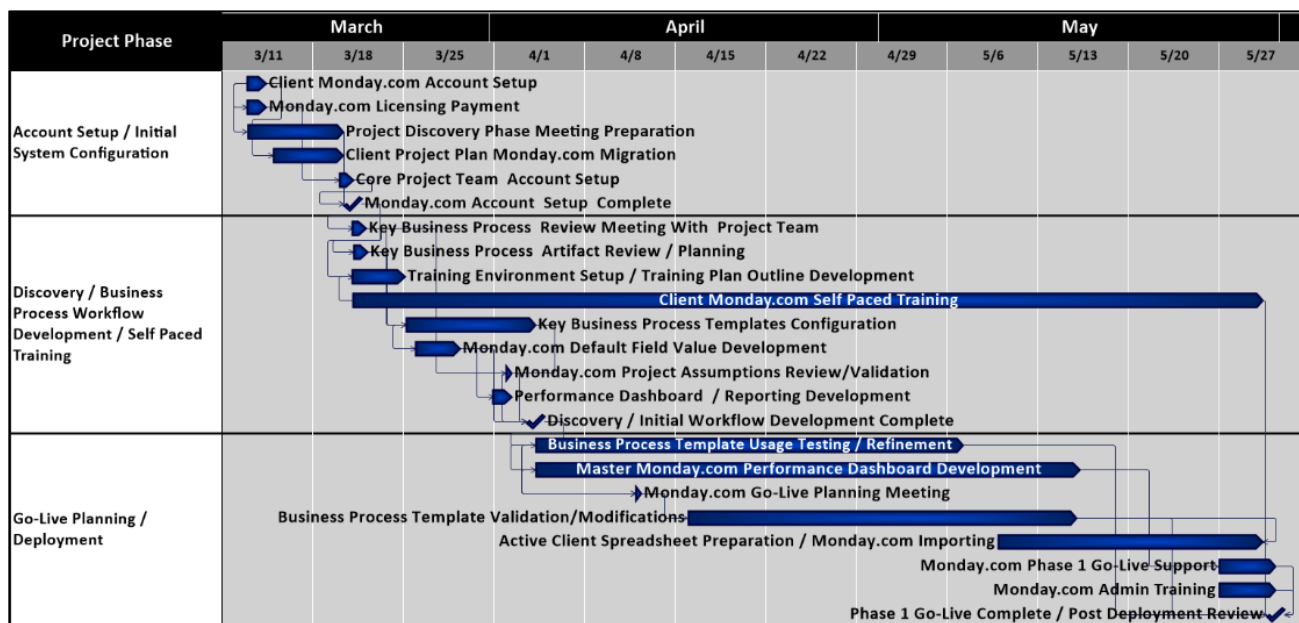
Our team used Monday.com's training content as the basis of an end-user self-paced training plan, allowing the employees to learn the functionality they would need to use the go-live workflows. Where needed, we developed custom training material focused specifically on understanding and using the primary business processes. We incorporated input from the end-users to refine the workflows. As employees faced other unanticipated daily operational demands, this end-user training became the critical path in the project timeline.

3. **Go Live Planning/Deployment.** Our immediate focus was implementing the minimum system functionality to address the must-have requirements the company had expressed during selection. They included a thorough understanding of how the processes being migrated into Monday.com would function most effectively. The client's planned rollout of performance dashboards for external customers proved more challenging than anticipated. While the work was completed, the client chose to table this functionality in favor of a focus on the core project's team use of the system. The client identified which clients would transition to go-live initially (preferably those in the early stages of contracts) and how the others would gradually migrate to the system. We then agreed upon the go-live date.

Following the initial migration of customers onto Monday.com, we reviewed the results with the client and many any needed adjustments. The client began planning for implementation of future functionality once everyone was proficient with the new system. BCS completed Monday.com's administration training before transition admin support to the client (remaining available if needed).

## Implementation Project Timeline

Together, we successfully implemented the new system in just over 12 weeks. As with the selection project, the duration and complexity were driven largely by the system scale, complexity of requirements, and the number of business processes being implemented.



### A Success for Our Client

The successful implementation allowed the financial services company to support its clients through a leading-edge cloud-based project management system. Instead of communicating through spreadsheets, the company now engaged with clients in real time, delivering solid evidence of their portfolio's performance.

Companies thinking about implementing a similar project management system to support their specific business needs in similar ways would benefit by remembering what helped to make this engagement successful for everyone involved, including:

- **Keep PM Selection and Implementation Projects Separate.** Executing the selection and implementation projects separately ensures the best system is selected while avoiding consultant PM system bias. The client should consider the right consulting resources for both projects before beginning.
- **Solve for Business Challenges.** Always start by identifying business challenges and what's needed to address them. Which of today's PM systems is right for your business? The one that best addresses your business challenges. Avoid consultants that talk about technology before talking about your business processes.
- **Client Engagement, Focus, and Participation is Critical.** The critical path in the project timeline will prove to be the client's core project team members' active participation and engagement. Expect the consultant to provide an estimate of the hours they believe the initial phases of the project will require.
- **Project Methodology Experience/Understanding.** A consultant's experience and understanding of a wide range of PM methodologies (i.e., waterfall, agile, Kanban, Kaizen, hybrid, etc.) is more valuable and far more critical than in-depth knowledge of any PM system.
- **Key Business Process Template Development.** Critical business processes or project plans should be developed as templates to facilitate employee familiarity and productivity.
- **Minimum Viable Product Functionality Implementation Focus.** It's better to handle a simple, limited implementation successfully than to discover a more complex effort may not be practical. Start with nothing but must-have business requirements.
- **Consultant Roll-off Plan Development.** Before the go-live date, ensure the consultant is developing a roll-off plan and admin training for the transition to your team.
- **Consultant Project Plan Management.** To gain immediate experience with a PM system, the consultant should migrate any implementation project plan and manage the project in the new system. This should include task assignments for core project team members to provide experience.
- **Vendor Implementation Methodology Usage.** PM system vendors have based their methodology on other successful implementations, so the consultant should leverage the vendor's knowledge as needed.
- **Perfect Systems Don't Exist.** You aren't going to find a PM system ready for your unique needs without some customization or adjustments. The goal is to choose the system that most closely matches what you need.

## Want A Successful Implementation, Too?

If you'd like to better understand how these processes work and learn how our expertise can help you accomplish your key business objectives, contact BCS today at [Dan.Smith@BCSinc.org](mailto:Dan.Smith@BCSinc.org).



# Appendix

## PM System Vendor Scoring Spreadsheet Example

#	Requirement	Priority	1. Monday.Com	2. Clickup	3. Asana	4. Wrike	5. Airtable	6. Smartsheet	7. Trello	8. Hive	9. Teamwork	10. CloudCoach	11. MS Project Planner	12. Project.Co	13. Zoho Projects	14. Basecamp	
1.0	System Administration		15	15	12	11	11	13	10	11	12	11	10	11	12	8	
1.1	System Licensing Year 1 *	5 Internal, 50 External	\$2,640	\$7,200	\$1,829	\$1,488	\$2,700	\$1,500	\$1,050	\$1,980	\$1,200	\$3,540	\$1,800	\$600	\$540	\$4,188	
1.1	System Licensing Year 2 *	10 Internal, 100 External	\$5,280	\$7,200	\$3,659	\$2,976	\$5,400	\$3,000	\$2,100	\$3,960	\$2,400	\$7,080	\$3,600	\$1,200	\$1,080	\$4,188	
1.2	Simplicity/Ease of Usage	Must Have	4	4	3	3	3	3	2	3	3	3	2	3	3	2	
1.3	Training	Must Have	4	4	3	3	3	2	2	3	3	3	2	3	3	2	
1.4	Vendor Implementation Support	Should Have	3	4	2	2	2	4	2	3	3	3	2	3	3	2	
1.5	Vendor Financial Considerations	Should Have	4	3	4	3	3	4	4	2	3	2	4	2	3	2	
2.0	Project Methodology Support		20	20	20	20	20	15	15	20	20	20	20	20	15	10	
2.1	Key Business Process Support	Must Have	4	4	4	4	4	3	3	4	4	4	4	4	3	2	
2.2	Engagement Project Template Creation	Must Have	4	4	4	4	4	3	3	4	4	4	4	4	3	2	
2.3	Project Task Element Support	Must Have	4	4	4	4	4	3	3	4	4	4	4	4	3	2	
2.4	Active Project Maintenance Flexibility	Must Have	4	4	4	4	4	3	3	4	4	4	4	4	3	2	
2.5	Project Financials Reporting	Nice-To-Have	4	4	4	4	4	3	3	4	4	4	4	4	3	2	
3.0	Performance Reporting Dashboard		16	16	16	15	11	11	12	16	15	16	14	16	12	7	
3.1	Client Portal Functionality	Must Have	4	4	4	3	3	2	3	4	3	4	2	4	3	1	
3.2	Management Reporting Functionality	Must Have	4	4	4	4	2	3	3	4	4	4	4	4	3	2	
3.3	Flexible Project Status Visualization	Should Have	4	4	4	4	3	3	3	4	4	4	4	4	3	2	
3.4	Program Status Reporting	Should Have	4	4	4	4	3	3	3	4	4	4	4	4	3	2	
4.0	Integration		12	12	12	12	12	12	10	12	9	8	10	3	6	3	
4.1	Box.com	Must Have	4	4	4	4	4	4	4	4	4	3	3	1	1	1	
4.2	Salesforce	Must Have	4	4	4	4	4	4	4	4	1	4	3	1	1	1	
4.3	Microsoft Office	Nice-To-Have	4	4	4	4	4	4	2	4	4	1	4	1	4	1	
5.0	System Functionality		20	20	19	18	18	18	20	18	18	19	19	19	15	12	
5.1	Cloud-Based/Multi-Tenant Support	Must Have	4	4	4	4	4	4	4	3	3	4	3	4	3	4	
5.2	Workflow/Alerting	Must Have	4	4	4	4	4	4	4	4	4	4	4	4	3	2	
5.3	Resource Management	Must Have	4	4	4	4	4	4	4	4	4	4	4	4	3	2	
5.4	Project Time Reporting	Nice-To-Have	4	4	3	3	3	3	4	4	4	4	4	4	3	2	
5.5	Client Collaboration	Nice-To-Have	4	4	4	3	3	3	4	3	3	3	4	3	3	2	
Requirement Evaluation Legend			Aggregate Score	83	83	79	76	72	69	67	77	74	74	73	69	60	40
4 - Available Out Of Box/Excellent			* Licensing expense only, does not reflect implementation costs														
3 - Configuration Required/Good																	
2 - Customization Required/Average																	
1- Poor/Not Available																	
Vendor Scoring Summary			MondayCom	Clickup	Asana	Wrike	Airtable	Smartsheet	Trello	Hive	Teamwork						



## PM System Single Vendor Assessment Spreadsheet Example

#	Requirement	Priority	Score	Comments
<b>1.0</b>	<b>System Administration</b>		<b>15</b>	
1.1	System Licensing Year 1	5 Internal, 50 External	\$2,640	Pricing option used was the "Enterprise" package
1.1	System Licensing Year 2	10 Internal, 100 External	\$5,280	
1.2	Simplicity/Ease of Usage	Must Have	4	UI appears to be simple to use and configure
1.3	Training	Must Have	4	Training options appear to be as good or somewhat better than the other vendors that have been shortlisted.
1.4	Vendor Implementation Support	Should Have	3	Monday.com primarily offers train-the-trainer as part of their licensing. Assistance beyond this is through a partner or freelance contractor network, which could cost in the \$125-\$250 per hour range
1.5	Vendor Financial Considerations	Should Have	4	Monday.com is publically traded, based in Israel
<b>2.0</b>	<b>Project Methodology Support</b>		<b>20</b>	
2.1	Key Business Process Support	Must Have	4	Appears to meet all requirements
2.2	Engagement Project Template Creation	Must Have	4	Appears to meet all requirements
2.3	Project Task Element Support	Must Have	4	Appears to meet all requirements
2.4	Active Project Maintenance Flexibility	Must Have	4	Appears to meet all requirements
2.5	Project Financials Reporting	Nice-To-Have	4	Appears to meet all requirements
<b>3.0</b>	<b>Performance Reporting Dashboard</b>		<b>16</b>	
3.1	Client Portal Functionality	Must Have	4	Provides the ability to add logos, color schemes, etc. and provide external access to clients to management reports
3.2	Management Reporting Functionality	Must Have	4	Appear to have a superior set of management reports along with ease of customization
3.3	Flexible Project Status Visualization	Should Have	4	Very good visual reports
3.4	Program Status Reporting	Should Have	4	Available and customizable
<b>4.0</b>	<b>Integration</b>		<b>12</b>	
4.1	Box.com	Must Have	4	Available, per website
4.2	Salesforce	Must Have	4	Available, per website
4.3	Microsoft Office	Nice-To-Have	4	Available, per website
<b>5.0</b>	<b>System Functionality</b>		<b>20</b>	
5.1	Cloud-Based/Multi-Tenant Support	Must Have	4	Available, per website
5.2	Workflow/Alerting	Must Have	4	Available, per website
5.3	Resource Management	Must Have	4	Available, per website
5.4	Project Time Reporting	Nice-To-Have	4	Available, per website
5.5	Client Collaboration	Nice-To-Have	4	Available, per website

### Requirement Evaluation Legend

- 4 - Available Out Of Box/Excellent
- 3 - Configuration Required/Good
- 2 - Customization Required/Average
- 1 - Poor/Not Available

### Aggregate Score

83



### Company Information

<b>Legal Name:</b>	Monday.com
<b>URL:</b>	<a href="https://monday.com/">https://monday.com/</a>
<b>Year Established:</b>	2012
<b># Employees:</b>	1,000
<b>Products / Services:</b>	Cloud based PM company
<b># Clients:</b>	127,000
<b>References:</b>	
<b>Vendor Licensing</b>	Per \$ 44
<b>Cost Containment %:</b>	
<b>Comments:</b>	Monday.com is a cloud-based platform that allows users to create their own applications and project management software. As of 2023, Monday.com has over 1,000 employees and serves over 127,000 customers across over 200 business verticals. Monday.com is a publicly owned company that is traded on the NASDAQ stock exchange under the ticker symbol MNDY. The company went public in June 2021 and is based in Tel Aviv, Israel

# PM System Detailed Requirement Document Example

## Project Management System Requirements

February, 2024

### 1. System Administration

#### 1.1. Licensing Requirements

##### Priority: Must Have

- This section will summarize vendor licensing information and the system will only be used by Company personnel specifically.
- Internal licensing requirements will be five user licenses, growing over the next few years.
- The primary managers/users will initially use the system. Up to 100 over the next few years.
- Peak period active client engagements (e.g., project plans) support growing up to one hundred over the next few years.

#### 1.2. Simplicity/Ease of Usage

##### Priority: Must Have

- The guiding principle for the PM system selection is simplicity. As the system may have many functionalities, many will be "Nice-To-Have" and not required by Company in the near future.

#### 1.3. Training

##### Priority: Must Have

- The selected system must have functionality that facilitates self-training for users. Ideally, this would be video training embedded into the User Interface.

#### 1.4. Vendor Implementation Support

##### Priority: Should Have

- The PM system vendor's ability to provide timely and effective implementation support is required.

#### 1.5. Vendor Financial Considerations

##### Priority: Should Have

- Some level of financial status, time in business, and vendor reputation should be reported.
- The selected vendor will likely require a deeper level of evaluation of stability and longevity of the company.

### 2. Project Methodology Support

#### 2.1. Key Business Process Support

##### Priority: Must Have

- The system must support hybrid project methodologies combining traditional and agile methodologies for client engagements.
- The system must handle all primary business process key data points and plan system functionality.
- The system must be able to handle any "workflows" currently handled in any business process documentation or process (i.e., cross-selling, project plan creation, etc.).
- The ability to filter project views such that some engagement project manager but not the client (i.e., the client will not see cross-selling activities).
- Any system requiring fundamental changes to the primary business process is not acceptable.

#### 2.2. Engagement Project Template Creation

##### Priority: Must Have

- Using the primary business process as the foundation, the system must support project plan templates. Project templates will facilitate onboard new clients and creating and setting up client engagement projects in the PM system.

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## Project Management System Requirements

February, 2024

### 2.3. Project Task Element Support

##### Priority: Must Have

- This requirement includes but is not necessarily limited to project task elements such as start date, end date, duration, predecessor/successor tasks, priority, notes, and resource allocation.
- PM system names should be modifiable to task naming convention (e.g., Milestone renamed to Checkpoint).
- The ability to store notes against a selected task/project or folder location. This functionality would support the design of project notes.
- The ability for a client to edit engagement project plans is not required, but the capability will ever be required.
- External advisory personnel will not require edit capabilities.

### 2.4. Active Project Maintenance Flexibility

##### Priority: Must Have

- Project engagement plans for active projects must be flexible. For instance, a project engagement may initially be based on a template, but the client may decide to change approach re project.

### 2.5. Project Financials Reporting

##### Priority: Nice-To-Have

- Available only to Company personnel, tracking/reporting project financials would be nice but not required.

### 3. Performance Reporting Dashboard

#### 3.1. Client Portal Functionality

##### Priority: Must Have

- Provide web-based access for external clients to PM system performance dashboards and reports.
- Access should be multi-tenant based; each supported Company performance data for their project.
- The PM system will not store any Personal Identifying Information. All data will be stored in Salesforce or Box.com.
- The ability to include some level of Company branding into the client portal.

#### 3.2. Management Reporting Functionality

##### Priority: Must Have

- The system will have both canned and custom report generation.
- The reports should provide performance dashboards and charts for internal and external client usage.
- External client dashboards will focus on primary business process metrics.
- Where a client chooses not to access a web-based client portal, quickly generating static or interactive reports that the management can use.
- Internal Company-only dashboards will focus on management metrics.

#### 3.3. Flexible Project Status Visualization

##### Priority: Should Have

- The system should be able to visually generate a gantt chart and grid-based project status views for any project.
- For any project, the ability to switch between views to display client should be available.

#### 3.4. Program Status Reporting

##### Priority: Should Have

- Available internally to Company management, the ability to generate reports that reflect client performance across all active projects.

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## Project Management System Requirements

February, 2024

- Engagement KPI metrics that report the productivity of the managers and the projects they support should be available.
- Some Red, Yellow, and Green status indicators to report client status would be helpful.
- Project risk management and reporting at go-live is not required, and the need for it is TBD.

### 4. Integration

#### 4.1. Box.com

##### Priority: Must Have

- Box.com is a must-have but not necessarily required for day one.
- The ability to link a specific task in a project template to a particular document or folder location in Box.com must be available.

#### 4.2. Salesforce

##### Priority: Must Have

- Integration to Salesforce is not required for day one but must be available for future usage.
- Other than PM system workflow/alerting functionality, all cross-selling activities will be handled within Salesforce.

#### 4.3. Microsoft Office

##### Priority: Nice-To-Have

- Integration with Outlook calendaring and the other Microsoft Office applications would be a Nice-to-Have and not required for day one or the near future.

### 5. System Functionality

#### 5.1. Cloud-Based / Multi-Tenant Support

##### Priority: Must Have

- The system should be a cloud-based platform supporting all major browser types (i.e., Edge, Chrome, Safari, etc.).
- A system requiring some level of client-based software to function is unacceptable.
- The system must provide multi-tenant functionality for client-based access.

#### 5.2. Workflow / Alerting

##### Priority: Must Have

- PM system must be able to configure automated workflows against a project and the tasks within the project. Associated with this is some "push" notification that will alert managers via e-mail or SMS messaging.
- Workflow/alerting functionality will be critical to ensuring the PM system can support cross-selling activities, which will be handled in Salesforce.

#### 5.3. Resource Management

##### Priority: Must Have

- The ability to have primary and secondary managers for any given project must be available.
- The system must provide the ability to use Company job titles for any resource assigned to a project.
- The ability to manage and forecast resource staffing across client engagements is not essential at this time. The need for this functionality is TBD.

#### 5.4. Project Time Reporting

##### Priority: Nice-To-Have

- Any system with personnel time reporting capability (i.e., timesheets) will be considered a Nice-To-Have functionality, but it's anticipated it will not be used soon.

#### 5.5. Client Collaboration

##### Priority: Nice-To-Have

- Real-time collaboration between Company personnel and clients using PM system communication mediums (i.e., chat) is a nice-to-have that will not be used at go-live, and the need for this functionality is TBD.
- It is anticipated that Company will continue to use client driven choices for communications (i.e., Zoom, Teams, e-mail, cell-phone, etc.).

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