

PPM TOOL REQUIREMENTS CHECKLIST

Capability	What to look for
Strategic alignment	Can the tool connect OKRs, KPIs, and strategic goals to portfolios and projects? Does it provide hierarchies and dependency visibility to show how work supports company objectives?
Portfolio visibility	Does the system offer multi-level boards, real-time dashboards, and portfolio status insights across teams and departments?
Work prioritization	Are there scoring models, prioritization techniques, and what-if analysis tools for evaluating project value and impact?
Resource & capacity planning	Can the platform visualize capacity, highlight constraints, and forecast resource availability?
Risk management	Can the platform visualize capacity, highlight constraints, and forecast resource availability?
Scenario modeling	Does the tool support scenario planning and portfolio simulation for budget, capacity, and timeline trade-offs?
Workflow customization	Are workflows, fields, structures, and views fully customizable?
Automation & AI	Does the system automate approvals, handoffs, and governance rules? Does AI provide insights, trend analysis, and recommendations?
Security requirements	Does the platform support enterprise RBAC, encryption, SSO/SAML, and compliance standards?
Integrations	Can the tool connect with ERP, CRM, DevOps, BI tools, financial systems, and existing project management platforms? Is API access available?
TCO evaluation	Are you aware of subscription vs. licensing costs, implementation cost, customization fees, support charges, and long-term maintenance costs?
Implementation readiness	Does the vendor provide migration tools, onboarding plans, deployment timelines, and change-management support?
Support & training	Are dedicated success managers, training programs, guided onboarding, and ongoing consulting available?