

# PMO/Portfolio Management Software Evaluation Model

Dimension	Importance (1-5)	Criteria	Evaluation					Analysis				
			Tool #1	Tool #2	Tool #3	Tool #4	Tool #5	Tool #1	Tool #2	Tool #3	Tool #4	Tool #5
<b>1 Functions</b>	0	< Maximum Score	0	0	0	0	0	0	0	0	0	0
<b>1.1 Opportunity Identification/Demand Management</b>	0	< Maximum Score	0	0	0	0	0	0	0	0	0	0
1.1.1 Identification								0	0	0	0	0
1.1.2 Identify follow-up information requirements								0	0	0	0	0
1.1.3 Evaluation								0	0	0	0	0
<b>1.2 Portfolio Identification</b>	0	< Maximum Score	0	0	0	0	0	0	0	0	0	0
1.2.1 Organizational								0	0	0	0	0
1.2.2 Product-based								0	0	0	0	0
1.2.3 Strategy-based								0	0	0	0	0
1.2.4 Project type								0	0	0	0	0
<b>1.3 Project Prioritization &amp; Selection</b>	0	< Maximum Score	0	0	0	0	0	0	0	0	0	0
1.3.1 Criteria development								0	0	0	0	0
1.3.2 Scoring and evaluation								0	0	0	0	0
1.3.3 Prioritization and ranking								0	0	0	0	0
1.3.4 Project approvals								0	0	0	0	0
<b>1.4 Resource Management</b>	0	< Maximum Score	0	0	0	0	0	0	0	0	0	0
1.4.1 Resource identification								0	0	0	0	0
1.4.2 Resource skill definition								0	0	0	0	0
1.4.3 Skill-based resource searches								0	0	0	0	0
1.4.4 Role-based resource searches								0	0	0	0	0
1.4.5 Resource capacity management								0	0	0	0	0
1.4.6 Assignments to specific individuals								0	0	0	0	0
1.4.7 Role-based assignments								0	0	0	0	0
1.4.8 Department/group assignments								0	0	0	0	0
1.4.9 Management of 100% of resource effort								0	0	0	0	0
<b>1.5 Governance</b>	0	< Maximum Score	0	0	0	0	0	0	0	0	0	0
1.5.1 Governance role identification								0	0	0	0	0
1.5.2 Governance process definition								0	0	0	0	0
1.5.3 Gating process definition								0	0	0	0	0
1.5.4 Process-based milestone definition								0	0	0	0	0
1.5.5 Project-based milestone definition								0	0	0	0	0
1.5.6 Approval tracking								0	0	0	0	0
1.5.7 Approval workflow								0	0	0	0	0
1.5.8 Electronic approval/signatures								0	0	0	0	0
1.5.9 Follow-up tracking and management								0	0	0	0	0
<b>1.6 Methodology Support</b>	0	< Maximum Score	0	0	0	0	0	0	0	0	0	0
1.6.1 Methodology definition support								0	0	0	0	0
1.6.2 Support for multiple methodologies								0	0	0	0	0
1.6.3 Methodology adaptation for individual projects								0	0	0	0	0
1.6.4 Template definition and distribution								0	0	0	0	0
1.6.5 Standard organization definition								0	0	0	0	0
1.6.6 Role and responsibility definition								0	0	0	0	0
<b>1.7 Workflow</b>	0	< Maximum Score	0	0	0	0	0	0	0	0	0	0
1.7.1 Standard workflow definition								0	0	0	0	0
1.7.2 Multiple workflow definition support								0	0	0	0	0
1.7.3 Workflow customization for individual projects/portfolios								0	0	0	0	0
1.7.4 Management of individual approvals								0	0	0	0	0
1.7.5 Management of multiple/group approvals								0	0	0	0	0
1.7.6 Support for different approval thresholds								0	0	0	0	0
1.7.7 Approval/role delegation								0	0	0	0	0
<b>1.8 Document Management</b>	0	< Maximum Score	0	0	0	0	0	0	0	0	0	0
1.8.1 Project documentation archiving								0	0	0	0	0
1.8.2 Project deliverable archiving								0	0	0	0	0
1.8.3 Support for multiple document types								0	0	0	0	0

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			Tool #1	Tool #2	Tool #3	Tool #4	Tool #5	Tool #1	Tool #2	Tool #3	Tool #4	Tool #5
1.8.4 Customizable document metadata								0	0	0	0	0
1.8.5 Support for multiple project categories/portfolios								0	0	0	0	0
1.8.6 Full-text document search and retrieval								0	0	0	0	0
<b>1.9 Project Management</b>	<b>0</b>	<b>&lt; Maximum Score</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
1.9.1 Project plan definition								0	0	0	0	0
1.9.2 Business case definition								0	0	0	0	0
1.9.3 Risk Tracking								0	0	0	0	0
1.9.4 Risk monitoring and management								0	0	0	0	0
1.9.5 Issue tracking and management								0	0	0	0	0
1.9.6 Scope change identification								0	0	0	0	0
1.9.7 Scope change impact analysis								0	0	0	0	0
1.9.8 Scope change approval								0	0	0	0	0
1.9.9 Baseline management								0	0	0	0	0
1.9.10 Cost tracking								0	0	0	0	0
1.9.11 Effort tracking								0	0	0	0	0
1.9.12 Schedule tracking								0	0	0	0	0
1.9.13 Performance measurement								0	0	0	0	0
1.9.14 Resource assignment monitoring								0	0	0	0	0
1.9.15 Resource levelling								0	0	0	0	0
1.9.16 Lessons learned/post implementation reviews								0	0	0	0	0
<b>1.10 Reporting</b>	<b>0</b>	<b>&lt; Maximum Score</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
1.10.1 Project reporting								0	0	0	0	0
1.10.2 Portfolio reporting								0	0	0	0	0
1.10.3 Role-based reporting								0	0	0	0	0
1.10.4 Standard project management reports								0	0	0	0	0
1.10.5 Standard portfolio reports								0	0	0	0	0
1.10.6 Dashboard portfolio views								0	0	0	0	0
1.10.7 Dashboard project views								0	0	0	0	0
1.10.8 Drill-down from dashboards to individual documents/deliverables								0	0	0	0	0
1.10.9 Customization of reports								0	0	0	0	0
1.10.10 Customization of dashboards								0	0	0	0	0
1.10.11 Personalized reports/dashboards								0	0	0	0	0
<b>1.11 Analysis</b>	<b>0</b>	<b>&lt; Maximum Score</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
1.11.1 Analytical tools								0	0	0	0	0
1.11.2 Decisions support tools								0	0	0	0	0
1.11.3 Statistical and trend analysis tools								0	0	0	0	0
<b>1.12 Value Realization</b>	<b>0</b>	<b>&lt; Maximum Score</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
1.12.1 Business case definition								0	0	0	0	0
1.12.2 Business case change management								0	0	0	0	0
1.12.3 Performance measurement tracking								0	0	0	0	0
1.12.4 Value realization management								0	0	0	0	0
<b>2 Integration</b>	<b>0</b>	<b>&lt; Maximum Score</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
2.1 Accounting								0	0	0	0	0
2.2 HR systems								0	0	0	0	0
2.3 Payroll systems								0	0	0	0	0
2.4 Work management systems								0	0	0	0	0
2.5 Business planning								0	0	0	0	0
2.6 Project management software								0	0	0	0	0
2.7 Time reporting								0	0	0	0	0
2.8 Analytics engines								0	0	0	0	0
2.9 Dashboard reporting								0	0	0	0	0
2.10 E-mail								0	0	0	0	0
2.11 Custom interface capability								0	0	0	0	0
2.12 XML support								0	0	0	0	0



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			Tool #1	Tool #2	Tool #3	Tool #4	Tool #5	Tool #1	Tool #2	Tool #3	Tool #4	Tool #5		
<b>3 Standards Support</b>	<b>0</b>	<b>&lt; Maximum Score</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
3.1 ISO 9000														
3.2 ITIL														
3.3 Sarbanes-Oxley														
3.4 CMMI														
3.5 PMBOK														
<b>4 Vendor</b>	<b>0</b>	<b>&lt; Maximum Score</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
4.1 Stability														
4.2 Revenue														
4.3 Installed base														
4.4 Partners														
4.5 Support policies														
4.6 Warranty														
4.7 Consulting Support														
4.8 Customization services														
4.9 Implementation services														
4.10 Training services														
4.11 After-sales support and care														
4.12 Escrow policy														
<b>5 Customization</b>	<b>0</b>	<b>&lt; Maximum Score</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
5.1 Methodology														
5.2 Templates														
5.3 Organization Structure														
5.4 Project Structure														
5.5 Project Evaluation Criteria														
5.6 Project Planning Requirements														
5.7 Project Tracking														
5.8 Project Reporting														
5.9 Project Metrics														
<b>6 Administration</b>	<b>0</b>	<b>&lt; Maximum Score</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
6.1 Organizational Definition														
6.2 Role Definition														
6.3 Category Definition														
6.4 Multiple time zones														
6.5 Multiple currencies														
6.6 Functional Security														
6.7 Project Security														
6.8 Data Security														
6.9 Role-Based Security														
6.10 Person-Based Security														
6.11 Role Delegation														
6.12 Audit trails														
6.13 Archiving														
<b>7 Technology Environment</b>	<b>0</b>	<b>&lt; Maximum Score</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
7.1 Operating System														
7.2 Database														
7.3 Delivery Platform														
	<b>0</b>	<b>&lt;&lt;&lt; Maximum Possible Score</b>												