

PDG B-5: PROJECT MANAGEMENT TOOLS

Project Management Guidance: For a project to meet its goals, stay on budget, and adhere to deadlines, there must be a strong plan in place for management and accountability of project activities. Project managers must track outcomes and deliverables, be aware of potential risks to project performance, and ensure appropriate staffing and resources are available to fulfill the project needs. In projects such as the PDG B-5 grant, with different activities and a multitude of tasks and components within each, many grantees have found a need for a tool to help them track project work. This document provides a breakdown of some of the project management tools available, along with brief descriptions for each.

- **Project Planning Software** – Allows both managers and stakeholders to map out and visualize a project's critical path, or the sequence of activities and tasks required to complete a project and the duration of those tasks and the way they relate to one another.
- **Task Management Software** – Enables users to organize and manage tasks and various aspects of each task, such as status, timeline, priority, update notifications, and resource allocation.
- **Project Tracking Software** – Allows managers to compare project metrics, such as costs, schedules, deliverables, personnel, and estimates made during the planning of the project.
- **Collaboration Software** – Enables multiple users to communicate, conference, and coordinate among themselves to facilitate group work and allows different users to work simultaneously on the same set of files by updating in real time.
- **Dashboard Software** – Connects data throughout a project and consolidates the information into digestible visualizations to help decision-makers come to intelligent conclusions.

The software applications and tools identified below are not an exhaustive list of platforms available, and these tools are not being endorsed by PDG B-5. Each grantee must identify the functions and tools that best align with their project work. Costs will vary depending on the product functions and capabilities. Interested grantees may wish to explore applications that allow potential users an opportunity to explore the tools and functions for no cost prior to purchase.

Table 1. **Tools with Feature Lists and Descriptions**

Company and Link	Features*	Description**
ActiveCollab https://activecollab.com/	<ul style="list-style-type: none"> • Project Planning • Task Management • Project Tracking • Collaboration • Dashboard 	ActiveCollab is an integrated project management and collaboration tool that combines task management, time tracking, and billing into one application. Its planning and organizational tools streamline and automate processes by linking time records with invoicing and a payment gateway for more accurate billing. The program helps organize projects, tasks and files in one place.
Asana https://asana.com/	<ul style="list-style-type: none"> • Project Planning • Task Management • Project Tracking • Collaboration • Dashboard 	Asana is a software-as-a-service designed to improve team collaboration and work management. It helps teams manage projects and tasks in one tool. Teams can create projects, assign work to teammates, specify deadlines, and communicate about tasks in Asana. It also includes reporting tools, file attachments, and calendars, along with additional features.

Company and Link	Features*	Description**
Basecamp https://basecamp.com/	<ul style="list-style-type: none"> • Project Planning • Task Management • Collaboration (no real-time updates to third-party documents) 	<p>Basecamp focuses on making project management more streamlined. Primary features include to-do lists, milestone management, forum-like messaging, file sharing, and time tracking. It proposes to increase accountability by helping teams communicate more efficiently, and enables users to organize people, delegate tasks, and monitor progress.</p>
Evernote https://evernote.com/	<ul style="list-style-type: none"> • Collaboration • Dashboard 	<p>Evernote is an application designed for note taking, organizing, task lists, and archiving. It allows users to create notes (which can be formatted in text), web pages, photographs, voice memos, or handwritten "ink" notes. Notes can also have file attachments, be sorted, tagged, annotated, given comments, searched, and exported.</p>
FunctionFox https://www.functionfox.com/	<ul style="list-style-type: none"> • Project Planning • Task Management • Project Tracking • Collaboration • Dashboard 	<p>FunctionFox is a cloud-based time tracking and project management application, offering timesheets and estimates, as well as scheduling, task assignment, and reporting. It can support an unlimited number of clients and projects and allows users to track project costs, expenses, project estimates, and quotes and budgets. Its to-do lists offer automated email alerts and users can run reports on clients, personnel, expenses, estimates, and more.</p>
Groupsite https://groupsite.com/	<ul style="list-style-type: none"> • Collaboration • Dashboard 	<p>Groupsite is a collaboration website for groups. It enables groups to communicate, share, and network. It features listservs, collaboration software, and social networks that empower groups to communicate, share, and network. It is a multi-purpose social collaboration platform.</p>
Hive https://hive.com/	<ul style="list-style-type: none"> • Project Planning • Task Management • Project Tracking • Collaboration • Dashboard 	<p>Hive is a cloud-based project management platform offering features, such as file sharing, task management automation, and chat. It allows users to create, classify, and assign tasks to members of a team, assign due dates, and attach files. The system allows you to track project status and modify items and variables. The software connects with popular cloud storage for easy file access, sharing, and collaboration.</p>
Monday https://monday.com/	<ul style="list-style-type: none"> • Project Planning • Task Management • Project Tracking • Collaboration • Dashboard 	<p>Monday is a collaboration and communication app for teams. It syncs information in a single, accessible hub, and empowers agents and team members to make decisions together. Monday focuses on streamlining contribution and assembling and displaying progress data in a logical manner, making it possible for team members to keep track of projects and common operations.</p>
Proggio https://www.proggio.com	<ul style="list-style-type: none"> • Task Management • Project Tracking 	<p>Proggio is a project management software that focuses on collaboration and teamwork. It is built for projects both long-term (highly integrated projects) and short-term (continuous stream of deliveries). It allows teams to view tasks, schedules, and priorities. Managers can plan steps, monitor progress, and manage budget, resources, and manpower.</p>
Project Insight https://www.projectinsight.net/	<ul style="list-style-type: none"> • Project Planning • Task Management • Project Tracking • Collaboration • Dashboard 	<p>Project Insight is a web-based project management software for teams. This software can serve as a centralized hub to delegate tasks, monitor productivity, and collaborate with team members. The platform allows for project prioritization, resource allocation, collaboration, and reporting on project performance.</p>

Company and Link	Features*	Description**
ProjectManager https://www.projectmanager.com/	<ul style="list-style-type: none"> • Project Planning • Task Management • Project Tracking • Dashboard 	<p>ProjectManager is a cloud-based project management system that combines project planning and scheduling features with collaboration tools for teams. This system allows users to create new projects, plan out and schedule tasks, allocate resources and assets, and monitor progress of all projects from a project dashboard.</p>
SmartSheet https://www.smartsheet.com/	<ul style="list-style-type: none"> • Project Planning • Task Management • Project Tracking • Collaboration • Dashboard 	<p>Smartsheet is a web-based collaboration tool for project management, team task management, crowdsourcing, and sales pipeline tracking. It offers programs a way to collaborate on projects and processes and is accessible from any browser and device. Smartsheet works like a spreadsheet and allows for visual timeline management, collaborative file sharing and discussions, and automated workflow capabilities.</p>
Trello https://trello.com/en-US	<ul style="list-style-type: none"> • Task Management • Collaboration • Dashboard 	<p>Trello is a project management and collaboration system. Trello utilizes the concept of boards (which correspond to projects) and cards (which correspond to tasks). The cards can track the progress of a project or organize activities. A few features include activity logs, voting features, in-line editing, data filtering, and deadline reminders.</p>
Vabotu https://vabotu.com/	<ul style="list-style-type: none"> • Task Management • Collaboration • Dashboard 	<p>Vabotu is a team messaging and collaboration application for teams. It allows for instant messaging, task boards, and is designed to increase efficiency and streamline collaboration. Additional features include note functions, calendar, and virtual, public, and private workspaces.</p>
Wrike https://www.wrike.com	<ul style="list-style-type: none"> • Project Planning • Task Management • Project Tracking • Collaboration • Dashboard 	<p>Wrike is an online project management software designed to improve the speed and efficiency of work in both co-located and distributed groups. Wrike enables multifunctional groups to collaborate from a single location. The service allows teams to schedule, prioritize, discuss, and keep track of both work and progress in real time.</p>
Zoho Projects https://www.zoho.com/projects/	<ul style="list-style-type: none"> • Project Planning • Task Management • Project Tracking • Collaboration • Dashboard 	<p>Zoho Projects is a project management software designed to streamline the process of project management and provide real-time tracking of productivity. This software allows teams to monitor progress and changes made to the project and tasks. Additional features include invoicing, budgeting, resource utilization, dashboards, and others.</p>

*Based on report from the company or PDG B-5 staff interpretation of features per the website.

**Product descriptions from Finances Online: Reviews for Business. <https://reviews.financesonline.com/>.