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Building Your Business Case for Switching to a Microsoft Project Alternative

With increasing pressure to do more with less, professionals within every industry are finding themselves more focused on improving efficiencies for the projects and processes they manage to stay ahead of the rapidly changing digital environment.

In fact, according to the **PMI Pulse of the Profession 2018**, one in four project management professionals stated that the ability to "learn, understand, apply, and keep up with technology" is the most-needed skill to stay ahead of the impacts of digital transformation.

This importance of staying ahead of the technology curve is why so many professionals are switching from legacy tools like Microsoft Project to work management solutions that help to improve collaboration, visibility, and efficiency for their projects and processes.

Even if you are one of the many ready to make the switch from MS Project, you may be dealing with a work culture hesitant to change.

That's why we created this guide to provide actionable steps that will help you make a business case for an MS Project alternative.

Understand How Your Team Likes to Work

Change can be met with resistance when teams consider the additional work and effort related to changing existing systems. It's important that you take into account how your team likes to work, showing that you've assessed the impact to them and are taking steps to minimize it. Consider the following factors:

☐ **Identify systems already in place.**
What operational systems are currently being used? There are likely systems in place like email, communication apps, and HR or time-tracking tools that would be helpful for your MS Project alternative to seamlessly integrate with.

☐ **Consider who will need to access the work.**
Does your team mostly collaborate with internal teams? Or is there a need to share project plans and documentation outside of your organization? Be sure to assess this need and ensure the tool you've selected can handle sharing and collaboration requirements.

☐ **Determine if remote access is necessary.**
Workplace structure has evolved and often means that your team or stakeholders are dispersed across departments, physical locations, and even time zones. Consider whether the ability to access work from anywhere and on any device is important.

☐ **Develop selection criteria to narrow the search.**
Understand that different stakeholders will have different requirements when it comes to your project management tool. Be sure to meet with key stakeholders to gather their "must haves" and develop selection criteria to evaluate the options on. Be sure to meet with key stakeholders to gather their "must haves" and develop selection criteria in order to narrow down the options to no more than three tools and complete the evaluation.

Know the Benefits & Be Ready to Share Them

Now that you've identified the criteria that your team will work best with, start to put together your proposal for making the switch. A key piece of this step is knowing the benefits of switching from MS Project, and then being able and ready to share them with your team. Consider the following benefits:

☐ **Increased productivity.**
With MS Project, typically only project managers access project plans. But by enabling team members' access to project details, it reduces the amount of time spent manually making updates and tracking down statuses. With the increased time savings, you can focus more on project execution and result delivery.

☐ **Centralized place to manage multiple tasks/projects.**
When everyone has access to the key project details and information (without needing to allocate licenses like in Microsoft Project), it reduces the time spent answering questions and providing information. It also increases transparency for stakeholders by giving them access to the information they need to make better decisions.

☐ **Improved visibility.**
In MS Project, it can be difficult to maintain visibility into the work getting done. With real-time visibility into project tasks and responsibilities, you can identify items that could be at-risk and quickly mitigate any potential issues. Additionally, with a clear, real-time view into the work getting done, it increases accountability and keeps team members on track.

☐ **Better adoption and engagement rates.**
One common feedback about MS Project is that it's too rigid and clunky, resulting in lower adoption rates. With a solution that is easy-to-use, your team will be more likely to adopt it and make updates, resulting in the most up-to-date information.

☐ **Access on any device.**
When access to MS Project is limited to certain devices, it hinders productivity and real-time updates. With the right alternative that enables remote access and the ability to update plans from a mobile device, teams are empowered to make updates as they come in, no matter where they are located.

Plan for the Launch & Involve the Right Stakeholders

Once you've laid out specific benefits of making the switch, you'll want to develop your plan to implement it. Gain input from all stakeholders, including someone from IT, who will be involved with the change. Be ready to present the "So what?" to key stakeholders, so they know how investing in the change will help the organization. Once you gain buy-in, help your team ease into the change by planning for it. Consider the following factors:

☐ **Plan.**
Identify and outline how current processes and resources will be impacted so nobody is surprised when the change occurs. Consider the scope, and break down large tasks into sub-tasks to make the work more manageable.

☐ **Track.**
Document measurable targets, goals, and milestones for each phase of the change in order to track progress. Alert team members of tasks they are responsible for to keep everyone accountable.

☐ **Manage.**
Ensure you have one location to plan and track both the change initiative and all key documentation so that it's accessible by your team and key stakeholders.

☐ **Report.**
Set up an implementation report or dashboard that rolls up key information, deadlines, and milestones, so that your team and key stakeholders can easily find status and identify whether the initiative is on track.

Create a Communication Plan to Help Handle the Switch

Communication is key when handling change, especially for those who are reluctant to it. A communication plan enables teams to discuss the changes, how specific individuals will be affected, and the ways in which team members can communicate with others regarding questions, concerns, or frustrations. Ensure your plan focuses on the following factors:

☐ **Communicate openly.**
Provide clear and open lines of communication between everyone at the organization — stakeholders, upper management, individual contributors, etc.

☐ **Facilitate feedback.**
Provide avenues to vent frustrations, questions, or other areas of concern in order to mitigate any issues.

☐ **Designate a champion.**
Identify a person on each team or within each department to be the subject matter expert when it comes to the new solution or process. This will empower those that have adopted the tool and will reduce the amount of questions you need to field.

☐ **Equip your team.**
Provide tools for change, such as trainings, tutorials, guides, and open discussions to address concerns and improve ease of adoption.

☐ **Make learning flexible.**
Store resources regarding the change in one location that is easily available to everyone, at any time, and continue to update them as you gain learnings.

There's No Time Like Now to Start Building Your Case

Ensuring you have the right tools and processes in place can make the difference when it comes to delivering projects and initiatives on time and on budget. And, although change can be met with resistance, staying with legacy tools that hinder adoption and productivity will have greater negative impact than the effort necessary for change.

Now that you have the essential factors to meet that resistance head on and provide a solution to clear the way, you can move forward with an MS Project alternative that improves collaboration, visibility, and efficiency to help you deliver more successful projects.

About Smartsheet

Smartsheet is a leading cloud-based platform for work execution, empowering organizations to plan, capture, track, automate, and report on work at scale, resulting in more efficient processes and better business outcomes. Smartsheet empowers collaboration, drives better decision making, and accelerates innovation for over 78,000 customers in 190 countries.

Smartsheet also complements existing enterprise investments by deeply integrating with applications from Microsoft, Google, Salesforce, Atlassian, and many others. Smartsheet has been recognized by 451 Research for exceptional technology innovation and named a leader in The Forrester Wave™: Collaborative Work Management Tools for the Enterprise, Q4 2018.

Discover a more collaborative, real-time way to manage your projects and processes with Smartsheet. **Contact our team, today.**