PROJECT INSIGHT

SB
CONSULTING,LLC

What to Consider Before Implementing a Project Management Tool

By Stacye Brim, Purpose-Driven Consultant and **Project Insight** Partner

Why Tools Alone Don't Solve Execution Challenges

When organizations feel bogged down by missed deadlines or can't see how work connects to goals, the first instinct is to adopt a new project management (PM) tool. After all, there's no shortage of software promising instant organization and accountability. **For mission-driven teams—nonprofits, educational institutions, and foundations—this challenge can feel even heavier.** Limited resources and high expectations make it crucial to get processes right before investing in new technology. But here's the truth: a tool alone cannot fully solve execution challenges. Without clear processes, even the best tool won't reach its full potential. Before you roll out a PM platform across your team, it's essential to step back and build a foundation.

Use this checklist to make sure your organization is ready before adopting a project management tool.

STEP ① Start with a portfolio view

Before processes, before software, you need clarity on what's already on your plate. Start by listing all your active projects and any that are "waiting in the wings." For each project, note basics such as:

- Who is leading it
- Team members supporting the project
- Start and expected end date
- Intended outcome

A simple table will give you a portfolio-level view, often for the first time. This exercise surfaces duplication, overcommitment, and priorities, giving you the clarity to decide how best to use your team's resources and what kind of tool will best support them.

Bonus: Take this a step further by noting each project's connection to your organization's strategy or annual goals. This helps you prioritize the work that truly advances your mission.

Portfolio view → clarity

See everything in one place.

▶ **Project Insight** gives leaders a complete picture of org-wide work so you can map projects to initiatives, spot overlaps, and right-size priorities. Keep the portfolio view current, then let the tool maintain it as work evolves.

STEP ② Define how projects begin

Next, examine how projects start in your organization. Is there an approval process, or can anyone kick off a project with an email or casual comment in a meeting? Are projects tied to annual goals and strategy, or do they pop up ad hoc?

Ask yourself:

- Who has authority to initiate projects?
- Why are projects started? Are they strategy-driven or reactive?
- How are priorities set and the backlog managed?

Without agreement on initiation, a PM tool risks becoming a dumping ground rather than a decision-making aid.

STEP ③ Make planning a discipline, not an afterthought

Too often, teams rush from "let's do this project" straight into execution. A strong planning process helps you avoid wasted effort and scope creep. It also gives your team confidence and clarity before work begins.

Key questions:

- Do you start with a clearly defined scope? Is it documented in a charter or similar format?
- Are resource needs (people and budget) identified upfront?
- Do project leads know how to create a realistic schedule?
- How are team members engaged in planning?

Remember the old saying often attributed to Dale Carnegie: "An hour of planning can save you 10 hours of doing." It's a reminder that investing time upfront creates efficiency later and prevents wasted effort when teams rush straight into execution.

A PM tool can help organize tasks, but it can't create alignment on scope and resources. That alignment comes from your team, not the tool.

> ### Process first → then scale the tool
>
> **Start with a minimum viable process.**
>
> Define initiation, a basic plan, and simple checkpoints.
> ▶ **Project Insight** fits that cadence on day one, then adds capacity planning, time and expense, and portfolio roll-ups when you are ready.

STEP ④ Decide how you'll track progress

Execution is where most teams hope a tool will save them. And yes, dashboards, task assignments, and reminders can make a big difference. But don't overlook the human side. Ask:

- How will you track progress against the plan?
- Will you hold regular check-ins (short, focused meetings work best)?
- What data must be reported upward for visibility?

A tool can streamline updates and reporting, but only if you first define what matters and how the team will communicate.

From updates to insight

Turn status into answers.

Dashboards in ▶ **Project Insight** surface percent complete, milestone health, and hours vs plan so you can brief executives, boards, and funders without manual spreadsheets.

STEP ⑤ Close projects with intention

Closure is the step most often skipped. Teams finish a project and immediately jump to the next. But without documenting lessons learned, you miss the chance to improve your processes.

Ask yourself:

- Do you follow a defined closeout process?
- What steps are taken when closing a project? Do you ensure final deliverables are complete, secure stakeholder sign-off (if appropriate), and capture lessons learned?

Building a habit of reflection, even briefly, makes each project better than the last. Intentional closure transforms every project into a learning opportunity, helping your organization grow stronger with each cycle.
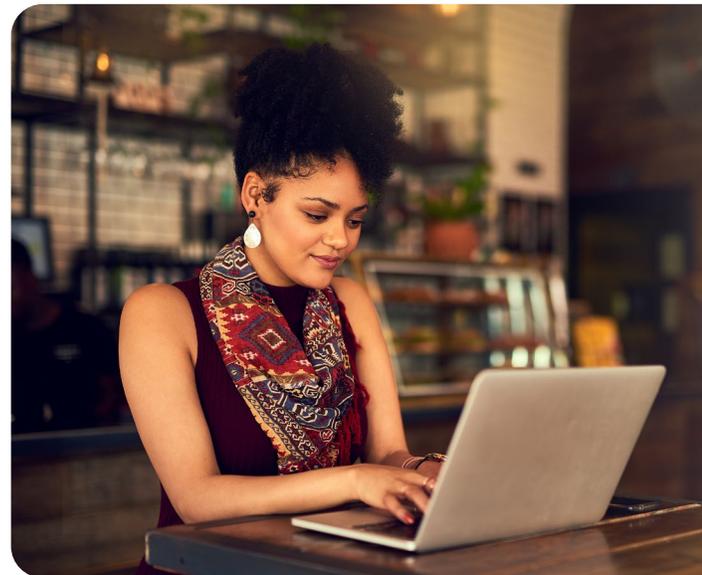
Start with a "minimum viable process"

Not every process has to be perfect before adopting a PM tool. But aim for a "minimum viable process," which includes clarity on initiation, basic planning discipline, a simple way to monitor progress, and closure habits. Once that framework is in place, a tool can amplify your efforts rather than create noise.

Build the foundation, then add the tool

Project management tools are powerful allies, but only if they're aligned with your organization's way of working. Start by clarifying your portfolio, defining initiation and planning processes, setting expectations for execution and closure, and committing to continuous improvement. Once you have that foundation, a PM tool can help you scale, streamline, and succeed.

PROJECT INSIGHT

Project Insight is a project and portfolio management system built to help connect the work you do with your mission and strategic goals. Once you've taken the time to align your projects, priorities, and people, Project Insight is ready to provide the structure and visibility to turn that strategy into measurable impact.

Verified nonprofits and mission-driven teams receive special pricing. Our partner, **Stacye Brim** can help introduce the Project Insight platform based on your organization's foundational strategy.

GET IN TOUCH

🌐 projectinsight.com

✉ sales@projectinsight.com

📱 949-476-6499

Book a Demo

STB
CONSULTING, LLC

Need help defining your "minimum viable process?"

I'd love to work with you! Together we can build the foundation that makes any tool work smarter for your team. Once your foundation is in place, it's time to find a tool that fits your team's rhythm and goals.

Full disclosure: Project Insight is one of several tools I recommend when teams are ready to scale process and visibility.