

Enterprise PMO Software Readiness Checklist

Complete this assessment before your first vendor demo — and use it to score every tool consistently.

PMO / Organization: _____	Evaluator: _____	Date: _____
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Part 1: PMO Self-Assessment

Complete this section before evaluating any vendor. Your answers define which tools belong on your shortlist.

1.1 PMO Maturity Level

Identify your current stage — it determines which tools are appropriate and which are overkill.

PMO maturity level	Characteristics	Best-fit tools
Emerging PMO (0–3 years, 10–30 projects)	Formalizing governance; needs standardized templates, project intake, basic portfolio visibility	Nimble , Wrike , Smartsheet
Scaling PMO (3–7 years, 30–100 projects)	Hitting ceilings on cross-team resource visibility, financial tracking, methodology consistency	Nimble Project , Asana , Microsoft Project
Mature EPMO (7+ years, 100+ projects)	Needs scenario planning, what-if capacity modeling, ERP/HRIS integration, deep financial governance	Planview , ServiceNow SPM , Oracle Primavera P6 , Triskell

Our PMO maturity level: _____

1.2 Current Tool Gaps — What's Breaking

Check every gap your current tool fails to address adequately. These are your non-negotiables in the evaluation.

Question / Criterion	Score (1–5)	Notes
Visibility		

	Question / Criterion	Score (1–5)	Notes
<input type="checkbox"/>	Cross-project portfolio visibility is manual (built in PowerPoint or Excel the night before steering committee)		
<input type="checkbox"/>	No unified view of all projects, programs, and their status in one place		
<input type="checkbox"/>	Stakeholder reporting requires significant manual effort to assemble		
<input type="checkbox"/>	Leadership cannot see portfolio health without asking the PMO to build a report		
Resource management			
<input type="checkbox"/>	Resource allocation happens in a spreadsheet that is always out of date		
<input type="checkbox"/>	No capacity planning — no visibility into who is overcommitted or underutilized		
<input type="checkbox"/>	Skill-based resource matching is not possible in the current tool		
<input type="checkbox"/>	Utilization forecasting across multiple projects is not available		
Governance and standardization			
<input type="checkbox"/>	Project intake is ad hoc — no standardized request/initiation process		
<input type="checkbox"/>	Different business units run projects differently with no consistency		
<input type="checkbox"/>	No stage-gate or approval workflow enforced by the tool		
<input type="checkbox"/>	Governance compliance relies on individual PM discipline, not system enforcement		
Financial tracking			
<input type="checkbox"/>	Project costing and budget vs. actuals are tracked outside the PM tool		
<input type="checkbox"/>	No financial forecasting or revenue tracking at project or portfolio level		
<input type="checkbox"/>	PMO cannot report on portfolio financial performance without manual consolidation		
Methodology and delivery			
<input type="checkbox"/>	Different teams run different methodologies (Agile, waterfall, Kanban) with no unified view		
<input type="checkbox"/>	The current tool forces all teams into one methodology regardless of fit		

	Question / Criterion	Score (1–5)	Notes
<input type="checkbox"/>	No hybrid support — cannot manage Agile and waterfall delivery in the same portfolio		

Part 2: Requirements Definition

Use this section to define what the new tool must deliver — and what success looks like. Complete before speaking to vendors.

2.1 Must-Have Requirements (Non-Negotiable)

List the 5–8 capabilities the tool must have. Any tool that fails here is eliminated from the shortlist.

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____

2.2 Nice-to-Have Requirements

Capabilities that would add value but are not eliminators if absent.

1. _____
2. _____
3. _____
4. _____
5. _____

2.3 Success Definition

What does success look like at 90 days and 12 months? Agree on this before evaluating vendors.

Timeframe	Success looks like...
At 90 days	
At 12 months	

Timeframe	Success looks like...
PMO KPI we expect to improve	
Stakeholder outcome leadership expects	

Part 3: Vendor Evaluation Scorecard

Use the same scorecard for every tool you evaluate. Score each criterion 1–5 (see scoring guide at the end). Run this during or immediately after each vendor demo.

A. Portfolio & Program Visibility

	Question / Criterion	Score (1–5)	Notes
Portfolio dashboards			
<input type="checkbox"/>	Real-time portfolio dashboard — all projects, status, and health in one view		
<input type="checkbox"/>	Cross-project dependency tracking and visualization		
<input type="checkbox"/>	Program-level rollup from team boards to program dashboard to portfolio		
<input type="checkbox"/>	Dashboard is role-configurable — executive view vs. PM view vs. team view		
Reporting			
<input type="checkbox"/>	Stakeholder reporting generated automatically — not manually assembled		
<input type="checkbox"/>	Report scheduled and distributed without PM intervention		
<input type="checkbox"/>	Portfolio financial performance reportable (budget, actuals, forecast)		
<input type="checkbox"/>	Export to PDF, Excel, or integration with BI tools (Power BI, Tableau)		

B. Resource Management & Capacity Planning

	Question / Criterion	Score (1–5)	Notes
Capacity planning			

	Question / Criterion	Score (1–5)	Notes
<input type="checkbox"/>	Resource capacity planning across all projects — not just within one project		
<input type="checkbox"/>	Utilization forecasting: who is overcommitted in the next 4/8/12 weeks?		
<input type="checkbox"/>	What-if scenario modeling: what happens to capacity if we take on a new project?		
<input type="checkbox"/>	Demand vs. capacity view for PMO planning conversations with leadership		
Resource allocation			
<input type="checkbox"/>	Skill-based resource matching — not just availability, but capability and experience		
<input type="checkbox"/>	Resource allocation visible to PMO across all projects simultaneously		
<input type="checkbox"/>	Timesheets native to the platform (not a third-party integration)		
<input type="checkbox"/>	Project costing and resource rate management built in		

C. Governance & Standardization

	Question / Criterion	Score (1–5)	Notes
Project intake			
<input type="checkbox"/>	Standardized project intake form / request workflow enforced by the system		
<input type="checkbox"/>	Approval routing: project requests go through defined approval chain before initiation		
<input type="checkbox"/>	Intake automatically assigns template, reporting structure, and stakeholder access		
Standards enforcement			
<input type="checkbox"/>	Project templates that enforce governance structure at project creation		
<input type="checkbox"/>	Stage-gate workflow: projects can only advance when defined criteria are met		
<input type="checkbox"/>	Definition of done / exit criteria enforceable at project and phase level		
<input type="checkbox"/>	Audit trail: changes to project plans, approvals, and escalations are logged		
Methodology support			

	Question / Criterion	Score (1–5)	Notes
<input type="checkbox"/>	Agile (Scrum/Kanban) supported out of the box		
<input type="checkbox"/>	Waterfall / phase-gate delivery supported out of the box		
<input type="checkbox"/>	Hybrid: different teams can run different methods in the same portfolio		
<input type="checkbox"/>	PMO can enforce consistent governance across teams regardless of methodology		

D. Financial Management

	Question / Criterion	Score (1–5)	Notes
Project-level financials			
<input type="checkbox"/>	Project budget creation and tracking native to the platform		
<input type="checkbox"/>	Actual cost tracking against budget in real time		
<input type="checkbox"/>	Cost forecasting / ETC (estimate to complete) built in		
<input type="checkbox"/>	Project profitability / revenue tracking for PS organizations		
Portfolio-level financials			
<input type="checkbox"/>	Portfolio financial dashboard: total investment, actuals, forecast by program		
<input type="checkbox"/>	Budget vs. actuals reportable across all projects without manual export		
<input type="checkbox"/>	Financial data integrates with ERP or finance systems (if required)		

E. Strategic Alignment

	Question / Criterion	Score (1–5)	Notes
Strategy to execution			
<input type="checkbox"/>	OKR / strategic goal mapping: projects linked to organizational objectives		
<input type="checkbox"/>	Portfolio investment aligned to strategic priorities — not just delivery status		

	Question / Criterion	Score (1–5)	Notes
<input type="checkbox"/>	PMO can report on portfolio value realization, not just milestone completion		
Prioritization			
<input type="checkbox"/>	Project prioritization framework built in or configurable		
<input type="checkbox"/>	Demand management: incoming project requests scored and prioritized against capacity		
<input type="checkbox"/>	What-if analysis: can model impact of adding/removing projects from portfolio		

F. Integration & Technical Fit

	Question / Criterion	Score (1–5)	Notes
Integration			
<input type="checkbox"/>	Integrates with existing engineering tools (Jira, GitHub, Azure DevOps)		
<input type="checkbox"/>	Integrates with communication tools (Slack, Microsoft Teams)		
<input type="checkbox"/>	HRIS / ERP integration available (if required for resource and financial data)		
<input type="checkbox"/>	API available for custom integrations		
Security & compliance			
<input type="checkbox"/>	SSO / SAML authentication supported		
<input type="checkbox"/>	SOC 2 Type II certified		
<input type="checkbox"/>	GDPR compliant data handling		
<input type="checkbox"/>	Role-based access control meets our governance requirements		

G. Implementation & Adoption

	Question / Criterion	Score (1–5)	Notes
Implementation			
<input type="checkbox"/>	Implementation timeline is realistic for our internal capacity		

	Question / Criterion	Score (1–5)	Notes
<input type="checkbox"/>	Professional services / customer success team available for onboarding		
<input type="checkbox"/>	Data migration support from current tool		
<input type="checkbox"/>	Configuration can be done without dedicated platform engineering resources		
Adoption			
<input type="checkbox"/>	PMO team can be productive within 30 days of go-live		
<input type="checkbox"/>	Stakeholder-facing reporting accessible without training non-PM users		
<input type="checkbox"/>	Mobile access for approvals and status updates		
<input type="checkbox"/>	Training materials and documentation are comprehensive and current		

H. Pricing & Total Cost of Ownership

	Question / Criterion	Score (1–5)	Notes
Pricing transparency			
<input type="checkbox"/>	Portfolio management is included in base plan — not a paid add-on		
<input type="checkbox"/>	Resource management and capacity planning included natively		
<input type="checkbox"/>	Financial tracking / timesheets included natively		
<input type="checkbox"/>	Pricing is sustainable at our projected user count for the next 24 months		
<input type="checkbox"/>	Implementation / professional services cost is clearly scoped upfront		
<input type="checkbox"/>	Free trial available without credit card commitment		

Part 4: Knockout Questions

If a tool fails any of these, remove it from your shortlist before scoring. These are the non-negotiable PMO requirements.

- Portfolio-level visibility is native — not a paid add-on or manual export process?

- Resource capacity planning across all concurrent projects is available natively?
- Supports our teams' delivery methodologies (Agile, waterfall, hybrid) without heavy configuration?
- Governance standardization (templates, intake, stage gates) is enforced by the system?
- Pricing is sustainable at our projected scale for the next 24 months?
- Security requirements are met (SSO, SOC 2, GDPR, role-based access)?
- Implementation timeline and cost are acceptable given our internal capacity?

Scoring Guide

Score	What it means
5	Excellent — fully meets this requirement; no gaps
4	Strong fit — meets key needs with minor gaps
3	Workable — meets most needs; some workarounds required
2	Weak fit — significant gaps that will affect PMO effectiveness
1	Not suitable — fails on this criterion

Tip: Weight Section A (portfolio visibility), B (resource management), and C (governance) at 3× their raw score — these are the PMO-critical capabilities. Weight Sections D–H at 2× or 1× based on your organization's specific priorities.

Part 5: Decision Summary

Tools evaluated	
Current PMO maturity level	
Top 3 tools shortlisted	
Best overall fit	
Primary governance gap this tool closes	
Biggest risk or limitation identified	
Internal champion / decision owner	

Target go-live date	
Next step	

See how NimbleWork scores on every criterion above.
Book a 30-minute PMO demo → nimblework.com/free-demo-request