

# Excel Doesn't Excel in Project Management: The Case for Web-Based Project Management Software

Over the past decade WorkZone has spoken with thousands of companies, in a wide range of industries, about their existing project management processes. To our continuing surprise, far and away the tool that companies currently use to manage their projects is Excel. While Excel is great for number crunching and data management, when it comes to project management across an organization, it leaves much to be desired.

## Why Not Excel?

Nearly every company in the world uses Excel in some area of its operations. For good reason too -- Excel is an extremely customizable and powerful analytical tool. Where Excel *doesn't* succeed, however, is in managing projects and sharing information across a team.

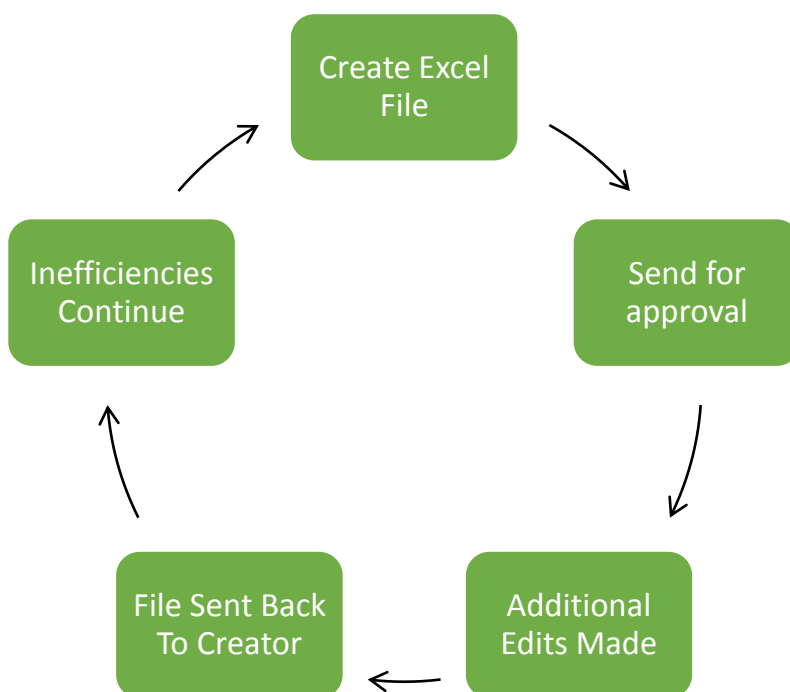
### *Limited Team-Wide Visibility*

Effective project management requires coordination across the multiple people working on a project. The latest version of an Excel file typically sits on a specific person's computer. Managing data this way works fine when flying solo, but proves problematic when the file needs to be sent to coworkers for review. Multiple versions of the file start to exist, and it becomes increasingly difficult to keep track of the latest version. While the project progresses, the spreadsheet's data may not get updated accordingly. With old or inaccurate data, the likelihood of missing deadlines or making mistakes increases significantly.

### *Inefficient Updating Process*

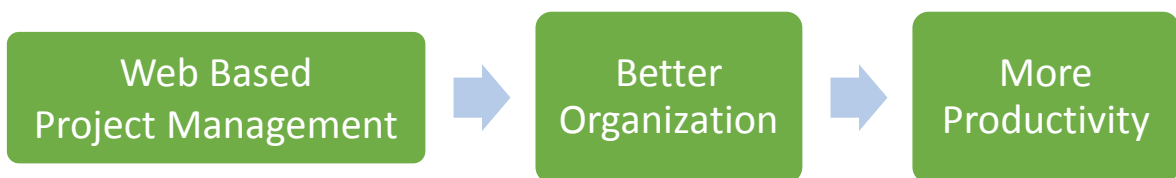
The person keeping the latest version of the Excel file usually has the burden of keeping it updated. This means repeated checking with other members on the team to get updates on their parts of the projects. This process can be very time consuming and inefficient. The process can also be error-prone, as the limited visibility means that the keeper of the spreadsheet is primarily responsible for quality control.

## Inefficient Updating Process



As a blank canvas, Excel has no built-in project management capabilities. Its use is typically limited to a list of projects with columns laying out specific milestones or target dates. While this information is helpful (subject to it being updated consistently and circulated frequently), it is not nearly sufficient to manage projects effectively. Here are some specific project management capabilities missing from the typical Excel spreadsheet:

- **Management Dashboard:** The detailed information in an Excel spreadsheet typically does not lend itself to a quick understanding of project status or identification of roadblocks. The project manager must create additional views or reports for senior management to give them the summarized information they need.
- **Missing task details and interdependencies:** Because Excel can be so cumbersome to maintain, projects typically are listed without much detail (often just a single row per project). As such, key steps in the process can be missed and delays in one step can push out the completion of the project, with little advanced notice.
- **No distribution of assignments to team members:** Excel is typically used as the project manager's view, but doesn't provide each team member with his/her own to-do list of what they need to do to keep the project moving ahead.
- **Reporting:** With no built-in reporting, Excel requires the project manager to build reports, which can be very time consuming. Moreover, certain reports (e.g., Gantt charts, workload, project roll-ups) may be beyond the capabilities of the project manager to report from Excel.

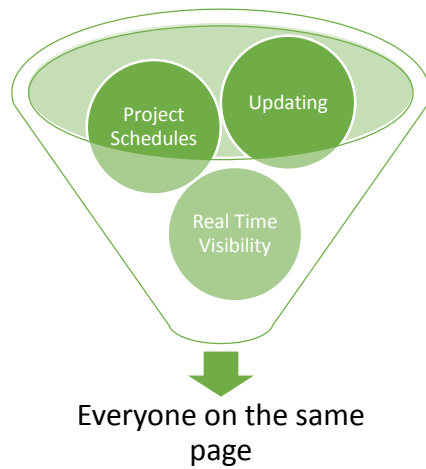


## Web-Based Project Management Software Offers Capabilities Excel Can't Match

There's been a dramatic shift in recent years toward cloud-based software, where instead of having a copy of the software on each local computer, the software sits on a server on the web and is accessed by each user with a web browser. Project management software has migrated to the web, as well, and is well worth considering as your organization looks to upgrade its project management processes.

Thankfully, there are many high-quality web-based project management tools that offer a significant upgrade to Excel. While specific tools vary widely, here are some of the main benefits you can expect from a quality web-based solution:

- **Real Time Visibility:** Those problems we mentioned before about tracking down the "true" version of a file in Excel? Gone using web-based project management software. Every member of the team has simultaneous access to the most recent project data.
- **Distributed Updating:** Instead of a single project manager having to update everything in Excel, with a web-based tool, the most appropriate team member updates each project or task. This makes the process much more efficient and reduces errors caused by information hand-offs.
- **Calculating Project Schedules:** Project management software can automatically calculate the project schedule from its component tasks, adjusting for weekends and holidays. Moreover, more advanced tools allow for the linking together of tasks that are sequential/interdependent, where changing the date of one task affects other parts of the project.



- **Different Views for Different Roles:** The best project management tools allow you to determine what each user can/can't see. Senior management may have access to data and views that are different from those seen by more junior team members.
- **Personal To-Do Lists:** Team members play different roles on a project, something Excel doesn't recognize. Web-based project management tools can create personalized to-do lists for each team member, allowing them to focus on the work they need to get done.
- **Automatic Alerts and Notifications:** As a static tool, Excel requires the user to remember to look at it and identify when there are issues that need attention. Sophisticated web-based project management tools, on the other hand, can automatically flag issues and email reports to users identifying potential items that need to be addressed.
- **Sophisticated Reports and Views:** Advanced project management tools provide Gantt Charts and a variety of other views (e.g., Workload, Time Tracking, Expense Tracking) that are not available in Excel, but are critical for effective project management.
- **Consistent Support:** The last, and possibly most important, point is that web-based project management software companies often have support teams *dedicated* to helping clients create success. Try finding someone at Microsoft to help you customize Excel to meet your current project management needs!

### Which Project Management Software Should We Choose?

There are many high-quality web-based project management tools that offer a significant upgrade to Excel. The right tool for a specific organization typically depends on:

- The volume and type of projects an organization needs to manage (this determines the functionality/capabilities the tool needs)
- The experience/technical skills of the team (how intuitive/user-friendly does the tool need to be)
- The level of support/handholding needed
- The available budget

WorkZone is an excellent option for teams managing a large volume of projects, needing sophisticated functionality in a user-friendly interface. If we can be of help in steering you towards the right project management tool for your situation (even if it's not WorkZone), please contact us at 610-275-9861 or visit us at [www.workzone.com](http://www.workzone.com).