

Salesforce Project Management Tool (PMT) vs. Project Lifecycle Pro

This is a comparison of Salesforce's **Project Management Tool (PMT)** vs. **Project Lifecycle Pro (PLP)** which are both available on the Salesforce AppExchange. PLP is the app I recently built and I wanted to understand how PLP compared and plan future improvements. I thought I'd share my analysis to save others time in evaluating Salesforce project management app options. I'll summarize my findings below and you'll find a detailed Excel scoring sheet attached which you can use to perform your own analysis.

If you are looking for Salesforce's equivalent to a scheduling tool like Microsoft Project or Primavera, neither of these tools are for you. PMT recently added a Gantt chart, but it is still buggy and lacks lots of basic scheduling functionality. PLP is intended to support all the project management processes **except** scheduling and is intended to integrate with a best-of-breed scheduling tool for a comprehensive project management solution.

If you are a professional service organization (software development, consulting, accounting, engineering, etc.) wanting to manage your client projects, neither of these tools are for you. You should search the Salesforce AppExchange for PSA tools to find the several apps dedicated to this industry.

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Summary of Findings

Overall, Project Lifecycle Pro (PLP) has much more functionality than PMT and covers all the project management processes but Quality Management. There are four processes where PMT doesn't have any functionality. The table below shows the coverage of each process as a percentage basis compared to full coverage.

PLP vs. Salesforce PMT Scores by PM Process		
	Project Lifecycle Pro	Salesforce PMT
Total	38%	24%
Communications Management	27%	9%
Cost Management	31%	0%
Integration Management	53%	52%
Procurement Management	13%	0%
Quality Management	17%	17%
Resource Management	31%	26%
Risk Management	83%	17%
Schedule Management	25%	28%
Scope Management	94%	44%
Stakeholder Management	71%	17%

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Pricing Comparison

Pricing is a major differentiator between PLP and PMT. PLP has a max single site-wide license of \$10K/year, with discounts for small companies. PMT is free, however, it requires Service Cloud. If you need to purchase Service Cloud for PMT in addition to another Salesforce license, the minimum additional cost will be \$300/yr/user. So if you have to purchase Service Cloud, PLP costs less for 33 or more users. If your users are already on Service Cloud, then PMT is truly free.

Scoring Methodology

I structured the analysis around the [Project Management Institute's \(PMI\)®](#) project management process. This is outlined in the [PM Book of Knowledge \(PMBOK\)®](#). First, I listed the project management processes and then the activities within each process. Finally, I developed a list of requirements related to each of the activities. The list of requirements is based upon my 30 years of project management experience and experience evaluating project management tools for clients. Of course, I'm sure I missed some requirements and welcome any suggestions.

I gave all processes and requirements equal weights, but you can adjust the scoring weights in the Excel spreadsheet to suit your needs. Each requirement was rated as either:

- **Yes - As Is** - Meaning, the requirement is met with out-of-the-box functionality. This rating is awarded four point.
- **Yes - With Configuration** - Meaning the requirement can be met with minimal configuration or no-code updates. Since, Salesforce is highly configurable I used this rating for simple things like changing picklist values, adding a field to an existing data object, creating a report, etc. This rating is awarded two points.
- **No - Not Available or Requires Customization** - Meaning the requirement cannot be met without significant investment of time or money. I assigned this rating if custom coding would be required, or a new custom data object or a new custom flow. This rating is awarded zero points.

Finally, the scoring spreadsheet totaled the ratings by process to show how the apps compare by process. Therefore, you can assess the apps based on which processes are the most important to you.

Communications Management

The only Communications Management functionality PMT has is the ability to communicate project status. However, PLP has dedicated functionality to identify stakeholders and project change impacts, as well as, plan the communications required. In other words, PLP has been built to provide change management support.

Cost Management

PMT does not have any functionality for recording or tracking project costs. In PLP, you can create separate cost line items and then total these costs by release, project or program. A baseline and current cost estimate are recorded so budget variances can be tracked. The costs are also categorized so you can differentiate expenses and capital expenditures.

Integration Management

Integration Management is the process of coordinating the overall project and the different project management processes. The two apps are fairly comparable in this process. PLP has a slight advantage because it supports different project record types so that you can customize the project phases, picklist values and various page layouts based on the type of project. Having functionality across more of the project management processes also means PLP will make overall integration and management easier.

Procurement Management

Neither of the two apps have significant procurement functionality. However, PLP has the ability to forecast cash flows by reporting costs by date. Also, vendor information can be added to the cost records to track vendor spend against a contract.

Quality Management

Neither of the two apps have functionality for testing or quality control. However, I hope to add software testing functionality in a future release of PLP. Testing functionality would consist of documenting test scripts and recording testing results.

Resource Management

Both apps have the ability to allocate resources to the project. However, PLP only allocates a person to the total project as a percentage of time. PMT allows allocation based on time periods (weeks, months, quarters). I hope to add the same functionality to PLP in the future. PLP does have more advanced functionality for controlling people's access to project data. PLP can provide global read-only access to a public project. PLP can provide access to the project, but restrict access to sensitive project financial data.

Risk Management

PMT only has a single text field to record risks associated to the project. PLP supports multiple risk records with associated mitigation plans. PLP users can assign tasks specifically to a risk to track its resolution. PLP will be expanding risk management capabilities in future releases, but since the infrastructure is in place, you can easily configure it to provide more detailed risk functionality.

Schedule Management

PMT captures isolated tasks and can display them on a Gantt chart. This is about the extent of its scheduling capabilities. As of October 2023 the Gantt chart is pretty buggy. Tasks aren't being displayed on the correct day in the Gantt. I was having difficulty changing tasks, duration, start or finish dates within the Gantt. PMT's Gantt is also missing basic scheduling capabilities:

- Doesn't support dependencies between tasks.
- Tasks cannot be scheduled using durations.
- Tasks don't capture labor.
- Tasks can't be arranged in chronological order.

PMT has a major flaw in that it uses a custom task object. That means that PMT tasks are stored separately from the standard Salesforce tasks. This means for a user to see all of their assigned tasks they must look in two different places: the Salesforce home page and the PMT dashboard.

PLP is not intended to be a scheduling tool, but is instead intended to integrate with a best-of-breed scheduling tool to provide a comprehensive project management solution. PLP uses the standard task object, with the intent that a user can view all their assigned tasks on the Salesforce home page regardless if the task is being generated from a project schedule or is created ad hoc directly in PLP. Integration with a scheduling tool involves implementing a flow that will synch tasks between the scheduling tool and the standard Salesforce task object. The popular Salesforce scheduling app Inspire Planner comes with this capability so can integration easily with PLP.

One nice feature of PLP is that tasks can be associated with both the project and its related objects. So you can associate a mitigation task with a risk, or a follow-up task to a requirement, etc. Yet, you can also report on all tasks within the project.

Scope Management

PMT only has a single text field to note scope of the project. PLP has a proper data structure where individual scope records are created and they can be categorized by people, process, technology and whether they are in or out of scope. Individual scope items can also be assigned tasks and Chatter conversations during the planning process. Finally, PLP has a scope metric based on the number of components to be built. This allows tracking the component count changes from the plan baseline as a proxy for scope variance.

Stakeholder Management

The only stakeholder management functionality PMT has is to record some key stakeholders such as 'Owner's Department' and 'Project Initiator'. PLP on the other hand, has been built to support change management. Separate stakeholder records are created and they can be associated to the planned changes so that communication and training can be planned. Department managers can also see upcoming changes because their departments have been identified as stakeholders, the stakeholders have been associated to changes, and the changes have been associated to release dates. This requires a complex many-to-many relationship which has been built into PLP's data infrastructure.

In Conclusion

If you currently have Service Cloud licenses and you are looking for a very basic project management tool, then PMT may be a good option for you. If you don't have Service Cloud or are looking for a fully functioning project management tool, you should have a closer look at PLP.

Regards,

Brian

