

Studio management software.

Why have a studio management software?

The best way to leverage and organise data is to manage it in one system – it's just not efficient to have it scattered in different systems/places.

Besides that, studio management software improves studio productivity:

- » a large database means you can do most tasks without keying new text.
- » the databases are linked, so estimates link to purchase orders and timesheets. This means invoicing can be as easy as clicking a few buttons to collate all the information.
- » profit margins are set within the software and displayed within the invoice template. It's a red flag if you don't make the expected profit.

Sure, the software licence is part of your overheads, but the increased productivity (and accuracy of data) means it pays for itself in a short time.

Features.

Here's a list of all the features to consider when searching for a studio management software:

Timekeeping.

The most basic use for studio management software is to record time against task against jobs. Timekeeping is the foundation of job costing and estimating.

Collaboration tools.

The most useful part of any studio management platform is that a disparate group of people can collaborate on a single project. Ability to collaborate on project resources, manage users, assign tasks and coordinate schedules is valuable for a local or remote team. Features like shared to-do lists, file sharing, milestones, time tracking and project overview makes collaborating easier.

Task scheduling.

When applied correctly, task scheduling is an incredibly crucial part of any project process. The ability to allocate tasks to different people and create dependencies on sub-tasks will help get all members of the team on task and on time.

A good example of hybrid studio management is a software that allows the studio manager to set up general milestones and the sub-tasks are left to the individual team-members to set. It's a middle ground between to-do's and objectives.

File storage and sharing.

Uploading documents and files to share with your project group is one of the best ways to get an overview of a project in terms of deliverables. It saves hunting through email chains for content and reduces the risk of missed files.

Time tracking and dependencies (task hierarchies).

The size and depth of a project can be diluted over time with strategic milestones, hierarchies and dependencies assigned by date and staff – an essential feature of a project management system.

Reporting and analytics.

If a project management software has reporting capabilities such as dashboards, you'll be able to visualise a project with graphs and charts to assess risk. This helps you to prepare reports such as job profit and losses, client billing reports, designer time billing reports, monthly profit and losses.

Studio management software checklist.

Name of software

Work management

Requests	<input type="radio"/>	Standardise request templates to gather information before project starts
	<input type="radio"/>	Automatically route requests to the appropriate team
	<input type="radio"/>	View status of all submitted requests
	<input type="radio"/>	Easily convert requests into new projects
	<input type="radio"/>	Convert emails into tasks
Prioritisation	<input type="radio"/>	See all requests in one view
	<input type="radio"/>	Easily prioritise work via commit date, project name, or by dragging and dropping
	<input type="radio"/>	View and prioritise personal tasks
	<input type="radio"/>	Easily organised daily to-do list, even with ad-hoc, high-priority requests incoming
	<input type="radio"/>	Be able to set task priority
Planning	<input type="radio"/>	Create custom workflows and project plans
	<input type="radio"/>	Easily set deadlines, milestones, and dependencies
	<input type="radio"/>	Adjust project plans and timelines via drag and drop
	<input type="radio"/>	Be able to see and adjust plans for multiple projects in one view
	<input type="radio"/>	Easily share project timelines and current status with clients
Assignments	<input type="radio"/>	Assign tasks to team members
	<input type="radio"/>	Evenly distribute workload across team for optimum productivity
	<input type="radio"/>	See tasks assigned to each team members and get a high level view of responsibilities
Project / task management	<input type="radio"/>	Use one central tool to manage all aspects of the project
	<input type="radio"/>	Create project folders, tasks, and subtasks
	<input type="radio"/>	Create custom workflows
	<input type="radio"/>	Compare schedule to see actual vs. planned progress
	<input type="radio"/>	Visual project timelines
	<input type="radio"/>	View progress across all current projects in one view
	<input type="radio"/>	Create custom, sharable project dashboards
	<input type="radio"/>	Easily share project progress with clients and stakeholders
Work notifications	<input type="radio"/>	Receive real-time status updates and notifications
	<input type="radio"/>	Receive notifications when a project or task is overdue
	<input type="radio"/>	View all notifications in one place
	<input type="radio"/>	Send instant notifications to team members with instructions or feedback
	<input type="radio"/>	Receive notifications when work can begin on a dependent task

Collaboration features	<input type="radio"/>	All communication held within the tool
	<input type="radio"/>	Real-time collaborative editing
	<input type="radio"/>	Document collaboration and version history
	<input type="radio"/>	Task comments section for work discussions
	<input type="radio"/>	Selectively share tasks with freelancers and contractors

Visibility

Calendar views	<input type="radio"/>	Custom calendars
	<input type="radio"/>	Integrations with Google Calendar, Outlook Calendar, iCal, etc.
Time tracking	<input type="radio"/>	Built-in task timer
	<input type="radio"/>	Compare planned vs. actual time spent
Reporting and dashboards	<input type="radio"/>	Custom dashboards
	<input type="radio"/>	Shared team dashboards
	<input type="radio"/>	Keep high-priority projects and tasks at hand
	<input type="radio"/>	Custom reports for big-picture visibility
Individual and team insight	<input type="radio"/>	View progress and achievements so team members can be recognised and appreciated
	<input type="radio"/>	See productivity across individuals and teams

Integrations

Digital asset management	<input type="radio"/>	Store, organise, and access all files and documents
	<input type="radio"/>	Link documents to related tasks so they stay in the proper context
	<input type="radio"/>	Proof HQ
Business applications	<input type="radio"/>	Excel, Evernote, Wordpress, QuickBooks, Xero, MYOB
Social/collaboration features	<input type="radio"/>	Slack
Custom Integrations	<input type="radio"/>	Open API

Usability and user experience

User-friendly interface	<input type="radio"/>	Customisable workspace
	<input type="radio"/>	Easy to navigate
	<input type="radio"/>	Adoption support (video tutorials, help pages)
Mobile apps	<input type="radio"/>	Free apps for iOS and Android
Security	<input type="radio"/>	Ensure work is secure
	<input type="radio"/>	Automatic data backups and easy data recovery
Support	<input type="radio"/>	24-hour customer and technical support
	<input type="radio"/>	Searchable knowledge base and simple tutorials