

# PSA Software Requirements Checklist

Choosing the right Professional Services Automation (PSA) software is one of the most consequential decisions your company can make. The wrong platform locks your team into more complexity, more manual work, and less visibility into the numbers that drive profitability.

This PSA software requirements checklist is designed to help you evaluate any PSA platform against the capabilities that matter most, organized across the six pillars of a fully connected service operation: **project management, resourcing and capacity planning, project financials, business intelligence, AI intelligence, and integrations**. Use it to build your internal requirements, align your buying committee, and hold every vendor you evaluate to the same standard.

## Project Management

Requirement	Why It Matters
<input type="checkbox"/> Project planning & scoping	Defining scope, timelines, and budgets before work begins reduces the risk of overruns from the start.
<input type="checkbox"/> Task management & assignment	Work needs to be clearly owned, prioritized, and trackable at the individual level across every project.
<input type="checkbox"/> Gantt charts & timeline views	Project schedules should be visible across the team, making dependencies easy to identify and adjust in real time.
<input type="checkbox"/> Task dependencies & sequencing	Managing the order of work prevents bottlenecks before they cause delays or budget creep.
<input type="checkbox"/> Agile & waterfall methodologies	Support for both agile and waterfall delivery ensures your team can match the right execution style to each project.
<input type="checkbox"/> Project milestones	Progress measured at key stages keeps stakeholders aligned and surfaces delivery risk early.
<input type="checkbox"/> AI-powered project completion forecasting	Based on the current delivery pace, the prediction of where a project will land against its deadline gives teams the visibility to course correct.
<input type="checkbox"/> Project templates	Recurring project types should launch consistently and efficiently, without starting from scratch each time.
<input type="checkbox"/> Project portfolio view	Leadership needs visibility across all active projects, not just individual ones, to manage capacity and risk at scale.

## Requirement

## Why It Matters

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<input type="checkbox"/> Project baselines	Comparing planned versus actual performance is how you continuously improve estimation accuracy.
<input type="checkbox"/> Retainer & recurring work management	Teams working across both one-time projects and ongoing client contracts need a single system that handles both.
<input type="checkbox"/> AI-powered risk flagging	Delivery risks, scope creep, and budget overruns should be surfaced automatically, while there is still time to act.
<input type="checkbox"/> Request & approval management	Client requests, change orders, and internal approvals need a consistent, trackable process to prevent them from falling through the gaps.
<input type="checkbox"/> Client portal	Clients should be able to view project status, submit requests, and approve quotes without requiring manual updates from your team.
<input type="checkbox"/> Workflow automation	Repetitive handoffs, notifications, and task creation should happen automatically, freeing your team for billable work.
<input type="checkbox"/> Mobile access	Team members need to log time, update tasks, and stay informed from anywhere, not just at their desks.
<input type="checkbox"/> Email & calendar sync	Communication and meetings should automatically link to the correct project or client record, with no manual entry required.

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# Resourcing & Capacity Planning

Requirement	Why It Matters
<input type="checkbox"/> AI-assisted resource scheduling	Assign the right people to the right work based on availability, skills, and project demand, not guesswork.
<input type="checkbox"/> Capacity forecasting & dynamic placeholders	Anticipating future demand with dynamic placeholder scheduling enables proactive staffing decisions to prevent gaps or overloads.
<input type="checkbox"/> Soft & hard resource allocations	Scheduling tentative resourcing for upcoming work without committing resources prematurely keeps pipelines realistic.
<input type="checkbox"/> Team availability view	Managers need to see who has capacity in real time, across roles, teams, and projects, without chasing updates.
<input type="checkbox"/> Custom user roles & access permissions	The right people should see the right data, and sensitive financial or operational information should be appropriately controlled.
<input type="checkbox"/> PTO / internal time capture	Ensuring planned time off and internal work are accounted for prevents overallocation and improves capacity accuracy.
<input type="checkbox"/> Dynamic drag-and-drop scheduling with real-time updates	Resource plans should be easily adjustable with immediate visibility into the impact of changes across projects and teams.
<input type="checkbox"/> Timesheet approvals & time-entry suggestions	Streamlining time submission and approvals improves accuracy, reduces admin overhead, and ensures billable time is captured.

# Project Financials

Requirement	Why It Matters
<input type="checkbox"/> AI-assisted time tracking	Time should be accurately logged with minimal manual effort, reducing the risk of unbilled hours and end-of-week guesswork.
<input type="checkbox"/> Billable & non-billable hour tracking	A clear picture of your team's time protects billable utilization rates, reveals where admin is consuming capacity, and protects margins.
<input type="checkbox"/> Billable rates management	Applying the right rates by client, project type, or team member ensures accurate invoicing every time.
<input type="checkbox"/> Project budgeting	Every project needs a financial framework from day one; without one, scope creep and margin erosion are inevitable.
<input type="checkbox"/> Expense & materials tracking	All project costs, not just labor, must be captured and attributed correctly for accurate margin reporting.
<input type="checkbox"/> Quote & proposal management	Estimates should be professional, consistent, and convertible directly into projects without re-entering data.
<input type="checkbox"/> Automated invoicing & billing	Invoices should be generated directly from logged time and expenses, with no manual reconciliation required.
<input type="checkbox"/> Retainer billing	Recurring revenue contracts need to be billed consistently and tracked against actual time and scope consumed.
<input type="checkbox"/> Revenue forecasting	Projecting future revenue based on active projects, pipeline, and resource capacity requires connected data.
<input type="checkbox"/> Real-time margin visibility	Knowing whether a project is profitable while you can still do something about it vs. finding out after the fact.

# Business Intelligence

Requirement	Why It Matters
<input type="checkbox"/> Real-time reporting dashboards	Leadership needs an up-to-date view of project health, team performance, and financial outcomes without waiting for manual reports.
<input type="checkbox"/> Project profitability reporting	Measuring the actual margin on every project reveals which work types, clients, and team structures are most profitable.
<input type="checkbox"/> Utilization tracking & reporting	Tracking billable utilization by person, team, or role shows exactly where productivity and revenue are being lost.
<input type="checkbox"/> Budget vs. actual reporting	Variances need to be visible early enough to course correct before they become margin problems.
<input type="checkbox"/> AI-powered financial forecasting	Forecasting that draws on delivery history, capacity signals, and financial targets produces projections and protects profitability.
<input type="checkbox"/> Custom reporting	Every firm measures success differently; look for custom reporting on the metrics that matter most to your business.
<input type="checkbox"/> Firm-wide visibility	Executives and operations leaders need a single source of truth across all clients, projects, and teams, not a patchwork of disconnected data.

# AI Architecture

Requirement	Why It Matters
<input type="checkbox"/> Native AI	AI capabilities embedded across the platform, and connected to real operational data, produce meaningfully better insights than AI added as a separate feature layer.
<input type="checkbox"/> AI across the full project lifecycle	AI that only touches one part of the platform can't see the full picture. Look for AI that simultaneously draws on data across delivery, resourcing, and financials.
<input type="checkbox"/> AI that continuously improves	Continuous machine learning from your historical project performance, past estimates, and delivery patterns improves predictions and recommendations with every project.
<input type="checkbox"/> AI-assisted resource and capacity planning by skill, availability, workload, and best fit	Resource recommendations should consider multiple dimensions simultaneously to optimize project outcomes and team utilization.
<input type="checkbox"/> AI-powered project insights, including completion dates and budget financials	Real-time insights should surface where projects are heading across both timelines and financial performance.
<input type="checkbox"/> Predictive risk flagging across projects, resourcing, and financials	Risks should be proactively identified across all operational areas, not just project delivery.
<input type="checkbox"/> AI-forecasted profitability	Profitability should be projected dynamically based on current performance, resource allocation, and financial trends.
<input type="checkbox"/> In-app agentic AI that makes recommendations and answers project questions	Agentic AI should proactively flag changes and risks, while allowing teams to quickly check project status and explore scenarios using natural language prompts.
<input type="checkbox"/> MCP connections to external AI tools (ChatGPT, Claude, Copilot, Gemini)	Seamless integration with preferred AI tools allows teams to query project data, visualize status, and model scenarios using both Accelo and external data sources to optimize delivery and profitability.

# Integrations & Platform Considerations

Requirement	Why It Matters
<input type="checkbox"/> CRM integration	Won opportunities should flow directly into project delivery without re-entering client or deal data, while pipeline visibility enables teams to plan ahead for likely wins.
<input type="checkbox"/> Accounting software integration	Financial data needs to stay in sync between your PSA platform and your accounting system to eliminate duplicate entry and reconciliation.
<input type="checkbox"/> Email & calendar integration	Communication should be captured automatically against the right client or project record, without manual logging.
<input type="checkbox"/> Project ticketing tools	Triage customer requests and streamline issue resolution using ticketing tools like Jira to connect existing workflows without disruption.
<input type="checkbox"/> Open API access	Custom integrations or connections to proprietary internal systems need to be possible as your firm's needs evolve.
<input type="checkbox"/> Single platform for all billing models	Billing for retainers, fixed fees, value-pricing, and project-based requests should all be manageable within a single system.
<input type="checkbox"/> Configurable workflows	The platform should adapt to how your firm works, not the other way around.
<input type="checkbox"/> Implementation & onboarding support	Getting up and running quickly requires expert guidance, not self-service setup alone.
<input type="checkbox"/> Security & access controls	Client data, financial information, and operational data must be protected with appropriate permissions and compliance standards.
<input type="checkbox"/> Scalability	The platform needs to grow with your firm, handling more clients, more projects, and more complexity without requiring a re-platform.

## Not every PSA platform is built the same. Accelo is purpose-built for professional services.

Where other PSA platforms cover parts of the lifecycle, Accelo connects the whole lifecycle: project delivery, resourcing, and financials, in a single, AI-fueled platform designed to help you deliver better work, protect margins, and grow profitably.

Seeing is believing; [schedule a personalized demo today](#).