inspire planner

Choosing a Salesforce-Native Project Management App

Seven questions to ask before you install. Bring them to every vendor on your shortlist, including us.

Several apps on AppExchange describe themselves as Salesforce-native. The label covers very different designs. These questions are about the year after the demo.

In the demo
Ask each question and note the answer.

In the trial
Check the answers on one real project.

In the security review
Share questions 1 and 2 with your security team.

01 Where does the project data live, and who owns it?

- [ ] Are projects, tasks, assignments and time Salesforce objects in our org?
- [ ] Do our sharing rules, reports and dashboards work on them?
- [ ] What happens to the data if we leave?

VENDOR'S ANSWER

INSPIRE PLANNER

Managed package; project records are objects in your org. Inspire Planner - External Portal 2.0 is hosted by Inspire Planner. Our security documentation sets out how it handles data.

02 What does a customer, partner or contractor need to participate?

- [ ] Is external collaboration built on Experience Cloud, or something else?
- [ ] What license does each external user need, and what does it cost?
- [ ] Do external users get a real project view?

VENDOR'S ANSWER

INSPIRE PLANNER

External Portal 2.0 is included. External users need no Salesforce license and carry no per-user Inspire Planner fee.

03 Is there a real scheduling engine?

- [ ] Do dependencies, constraints, calendars and non-working days reschedule the plan?
- [ ] Are there baselines and a critical path?
- [ ] Can automation recalculate the schedule?

VENDOR'S ANSWER

INSPIRE PLANNER

The Gantt Scheduler is included for every customer. Advanced Scheduling Automation is coming to Premium+ and is in Private BETA with selected customers.

04 How do you standardize - and keep projects standardized?

- [ ] Can a project be built from the Products on an Opportunity?
- [ ] How are template versions managed?
- [ ] What happens to live projects when a template improves?

VENDOR'S ANSWER

INSPIRE PLANNER

Templates, Template Stitching and Template Console. Advanced Template Management is coming to Premium+ and is in Private BETA with selected customers.

05 Does every stakeholder get the experience they need?

- [ ] What does a project manager, a team member and an executive each see?
- [ ] Do they all pay the same?

VENDOR'S ANSWER

INSPIRE PLANNER

Project Gantt, Task Console, Project and Portfolio Dashboards, External Portal 2.0. Standard, Contributor and Read-Only licenses.

06 What does it cost, all in?

- [ ] Are features gated by edition?
- [ ] What is the minimum commitment?
- [ ] What do external users cost?

VENDOR'S ANSWER

INSPIRE PLANNER

One platform, no feature editions. Published prices, 10 Standard licenses to start, volume pricing for 30+ licenses.

07 Who will your admin be talking to in year two?

- [ ] How often does the app release, and do new features arrive switched off?
- [ ] What is the support model?
- [ ] Does the vendor's own team run onboarding?

VENDOR'S ANSWER

INSPIRE PLANNER

Three Major Releases a year, new capabilities Available - Opt-in, a structured 6-8 week onboarding plan, run by our team.

Put our answers to the test.

Book a demo in your own Salesforce org, or start a 30-day free trial from AppExchange.

inspireplanner.com

© 2026 Inspire Planner Inc. Salesforce, AppExchange and Experience Cloud are trademarks of Salesforce, Inc. Inspire Planner is an independent application available on AppExchange and is not affiliated with Salesforce.