How to Decide if the Software Solution You Are Researching…

Is Right For You.

An Action Guide

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How to Choose the Right Software System That's Right For You and Your Team

We've written a comprehensive checklist for you to use when searching for a new software system for your organization.

Step 1 System Analysis:

Identify Your Stakeholders

Include all stakeholders when discussing requirements – end users, executives and appropriate finance and IT personnel. Make sure you talk with them about:

- ☐ **Learning Curve / Time to Ramp Up**
  Can you pick up and figure out the software within a day or so?
- ☐ **Scalability and Flexibility Factor**
  How well will the software match your future needs if you plan to expand your current employee and revenue levels?
- ☐ **Integration Factor**
  Does the software need to integrate with other software that you are currently using?
- ☐ **Current Business Processes**
  Are you buying software to fix a broken business process? Software can't do this. Make sure to optimize your business processes before buying software.

Web-based or Installed?

To determine if you need a web-based or installed (on premise) software solution, answer the below 4 questions. If you answer "yes" to 3 or more, an installed solution may be the one for you. Otherwise consider web-based or SaaS (Software as a Service) options.

- ☐ Do you have a dedicated, in house IT Dept?
- ☐ Are there numerous customizations/unique requirements for your business? (Tip: we recommend fewer customizations and more configurations, unless the software includes tools to easily customize your solution).
- ☐ Do you have control, access, or security constraints?
  - ✓ How elaborate is your internal security setup?
  - ✓ Do you have unique roles for individuals such as those who only need to access certain parts of the software, e.g., an "intake" person only needs access to the

intake screens / a grant writer only needs access to the reporting tools / an admin needs access to the entire system.

- Do you need to integrate with several other systems?

Step 2: Ten Critical Questions to Ask

1. Does the solution satisfy your most important requirements?
   Yes | No
2. Does the vendor offer excellent support and speedy service?
   Yes | No
3. How user-friendly is the solution?
   5(easy) | 4 | 3 | 2 | 1(hard)
4. How compelling are the vendor's testimonials/reviews?
   5(compelling) | 4 | 3 | 2 | 1(weak)
5. How easy/complex is the implementation?
   Yes | No
6. Does the solution require changes to your business processes?
   Yes | No
7. Does the vendor have customers similar to you?
   Yes | No
8. How customizable is the solution?
   5(very) | 4 | 3 | 2 | 1(cannot be tailored)
9. How innovative is the solution, compared to others on the market?
   5(very) | 4 | 3 | 2 | 1(not innovative)
10. Does the solution satisfy some of your less important, "nice to have" requirements?
    Yes | No

Step 3: Evaluations

References

When asking a software consultant or vendor for references, stipulate that they should be as similar to your company as possible. References from current customers speak much louder than anything the software company can say. Try and obtain at least 3 references. Examples to think about:

- In your industry
- Of similar size to your company
- With similar business requirements

- In the same state or city?
- Who have used the software for at least one year

SIX No-Nonsense Questions to Ask a Reference:

1. What was the true cost of the software (including upkeep and maintenance)?
   - ☐ Licenses $______________/user/yr
   - ☐ Hosting $______________/yr
   - ☐ Training $______________/user/yr
   - ☐ Professional Services $______________/hour

2. What's the quality of the support you receive from the vendor?
   5 (good) | 4 | 3 | 2 | 1 (poor)

3. Have you experienced any bugs or problems with the software after your system went "live"?
   - ☐ Yes | Explain:
   - ☐ No

4. How, specifically, has the solution cut costs or improved efficiency (or has it)?
   Explain:

5. What does your company receive (if anything) from the vendor in return for being a reference (i.e., what is your relationship to the vendor)?

6. What would you have done differently when selecting/implementing this software?

Step 4: Demonstrations

Demonstrations are your opportunity to see the software solution 'in action'. It is your opportunity to see how it will meet your need or requirement.

FIVE Tips to Getting the Best Demonstration for Your Time

1. Include a handful of various user groups at your demo. Each group will have specific questions about their work and how the software will affect it. Try to include folks from at least each of these groups.
   - ✓ End-users (case workers)
   - ✓ Report writers
   - ✓ Administrators

- ✓ Managers/Directors
- ✓ CFO or accounting
- ✓ Training

2. Write down a process script. Make sure you know what you want the vendor to show before the demo occurs. Although the software may include a lot of functionality – it's important you see what you need to; those items that are important to required functionality vs. "nice to have" items. Also – handing your script to the vendor in advance will give them an idea of what they absolutely need to cover during your time together.
3. Create detailed scorecards – this is extremely important as it will allow you to objectively compare different vendors for various areas of functionality, features and benefits.
4. Debrief after your demo. Many companies do not do this – but it is important to debrief "right after" or shortly after the actual demo so you keep what you learned fresh in your mind. At the very least – schedule a debrief with your team members soon thereafter. What you don't want to do is skip this very crucial step!
5. Don't do more than 3-5 demos. This is another important step. If you watch too many demos… you risk each system blending in with the next – a problem that may cause indecisiveness. Treat a free trial the same way. Once you download it – spend a few hours (no more) testing it out.

Now this entire process can take as long as you need, however – depending on the urgency of your situation – you may have a compelling event to decide and move quickly. In either case – this action guide can help you stick to the mission critical questions… along the way! Of course, if you'd like to speak to someone on our team – [you can reach out to us at any time].