

Your Roadmap To Buying BUSINESS SOFTWARE



The road to buying business software is tough to navigate, and it's easy to get lost along the way. With tens of thousands of business software programs available, how do you know which direction to go? Capterra has mapped out a guide to finding the best software for your organization. Happy travels!

1 RECOGNIZE NEED FOR SOFTWARE



Identify a tedious, cumbersome process that can be automated through software.

Payroll?
Employee Reviews?
Website Content?

Lead management?
eCommerce?
Customer Service?

Identify an opportunity for growth that can only be made possible by software.



2 EDUCATE YOURSELF



Read about how other companies like yours use software to address similar issues.



Understand the software costs, such as licensing, support, implementation, and training.



Understand the additional costs, including the time to train employees and potential changes to your business processes.



Research all the features available and how they could benefit you.



Learn about common pitfalls.



Educational Resources: vendor websites, industry websites, online forums, tradeshows, customer interviews and case studies.

Be Aware: much of your reading material will be biased, often written by the vendors themselves. This isn't necessarily bad since the vendors are often the experts, but it is worth recognizing.

REQUIREMENTS	10
BENEFITS	23
BUDGET	250

3 DETERMINE YOUR GOALS

Write down your requirements. Distinguish between must-haves and nice-to-haves.

Articulate your expected benefits.
How will software save your company time and money?
How will it help generate additional revenue?

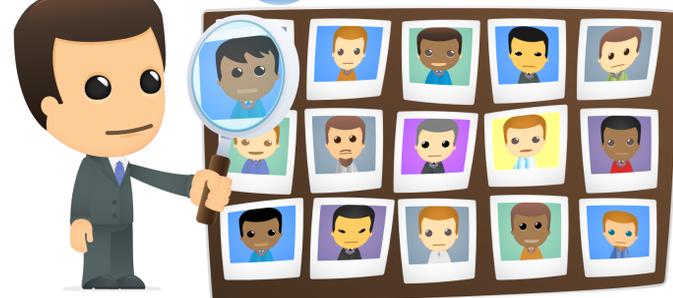
Develop an initial budget based on the benefits and what you learned about software costs from your initial research.

Create a list of criteria by which you will grade each vendor.

Get buy-in from future software users, executive team, and tech team.



4 IDENTIFY POTENTIAL VENDORS



Create long list:



This should be as comprehensive as possible, there will likely be dozens of potential vendors.

Narrow to short list



Based on your criteria, cut your long list down to 3-6 vendors.

Schedule demos



A better look at your short list solutions with online demos, which usually last 30-90 minutes.

5 EVALUATE THE VENDORS



Include end users in the demos. If your users don't enjoy using the software, they won't use it.



Take excellent notes. How the salesperson treats you is a great indicator for how they treat customers.

Ask about integration with other software products.



Ask about training.



Request references from companies that are similar to yours.



But also find your own additional references!

6 CHOOSE YOUR VENDOR



Receive quotes/proposals

Negotiate

Thank the others

Pick One



WELCOME

7 IMPLEMENT THE SOFTWARE



- Schedule training
- Make necessary changes to business processes
- Perform data migration and integration
- Schedule periodic reviews to measure usage and benefits



Sources: <http://www.capterra.com/>