

Selecting business software: A survival guide



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Sixteen business owners are taken into a computer store and given one week to find, purchase and implement new financial software for their company. They're left to their own devices, given little direction. And their only luxury item is Internet usage, adding more choices to further compound the task at hand. Who will find software nirvana, and who will end up wishing they were never born?

Sound like a crazy new reality TV series? Not exactly. But in the business world, many professionals find themselves in a similar dilemma. They haven't a clue how to analyze which program would best match their business needs.

But don't despair. Here is a simple, structured approach to selecting the right software. For larger purchases, more than \$500, these basic tactics can be used to avoid expensive mistakes.

Rule 1: Know what you want

Many times the person put in charge of software procurement doesn't have a complete comprehension of how the organization uses (or will use) the program. The first phase of software selection is to analyze your needs, then perform research. However overwhelming, time taken here is time well spent.

Interview end users

Gather all personnel who will use the software (from clerical staff to the owner). Ask them to explain how each department will use the tool in performing their jobs. Find out what they

With so many products, it's a jungle out there. Learn to buy precisely what you need

like/dislike about the current software, and get a "wish list" of items they would like to see.

Produce a feature/function list

After speaking with the end users, compile a complete list of system features and functionality, ranking it as "mandatory," "important" or "wish list" items. Include non-product-related needs, such as vendor locality, training services, warranty and maintenance, technology used, new hardware required, implementation needs, etc.

Organize a project team

Have a representative from each department on a selection team to perform research, view demonstrations and select the final product choice.

Create a requirements list

Using the information gathered in previous steps, create a requirements list, be it an RFP list or something less intricate. A requirements list/RFP document will help you to evaluate competing software products using the same uniform criteria. Many Web sites provide example requirements lists and templates, such as www.technologyevaluation.com.

Outline project logistics

Budgets, deadlines, live date—make certain you address all of these issues. Try to be as realistic as possible, allowing enough time to complete each step. In addition, be flexible; understand that these dates are subject to change.

Rule 2: Shop till you drop

Now that you have painstakingly outlined your company's requirements, begin to research vendors. The Web is

a powerful tool to gather information. Search engines such as www.google.com, www.msn.com or www.yahoo.com can make locating vendors easy. Enter a few key words to describe the software you are looking for, then thoroughly review each vendor's Web site. If you are able to get in without a password, check out their client support page to see how robust and user-friendly it is.

In addition to Web research, seek out advice from others, such as industry professionals (for example, CPAs for accounting and financial software, designers for desktop publishing applications, etc.) as well as peers within your industry.

A final research path typically considered is hiring a consultant. If you pick a good consultant, this option can have fabulous results. The down side is that you almost need a consultant to hire the consultant, and determining what represents a good consultant can be as difficult as selecting the software package itself. Do everything that you would do if you were going to analyze the packages on your own. In addition, check the consultant's credentials. Get a good feel for his or her experience level with both the type of software you need and your industry. And most importantly, stay involved. You will still need to put forth as much, if not more, effort to stay in control of the analysis process.

Send the requirements list/RFP to vendors

After gathering a list of potential vendors,

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send each one a letter with your requirements list/RFP. Be very specific in your instructions, providing exactly what you want them to do along with a deadline for submission. Ask the vendor to send you a hard copy of their company and product literature, a demonstration CD, hardware requirements and reference information from current users you can contact. You may also wish to request samples of their user documentation.

Narrow the pool

Once these are returned, review and organize the information. Rank the vendors based on how well they handle your specific needs. Meet with your team to select the top three to five companies to contact for a formal demonstration.

Rule 3: Select a winner

You are now ready to see each software product in action. It is important to have your selection team members present, ensuring that every question gets answered. Ideally, you should prepare a brief script or checklist outlining the key areas you need to analyze. This helps ensure that you are comparing apples to apples as you see each system.

Control the demonstration

You may notice that each sales representative seems

to follow a standard demo script. They will (or should) start by asking questions about your business and what your objectives are for the new system. This is normal and will help the salesperson to understand your business.

This is not to say, however, that you should remain completely submissive during the presentation. It is important to establish control over what you want to see in the demonstration. Make it a point to ask questions about the salesperson's credentials, background and experience in system training and support. You can also ask what version of the system you are seeing, if it is the same version you would be purchasing, how long this version has been on the market and how many clients they have in total versus how many are running the current version.

Specify what you want to see

During the demonstration, use your script as a guide. Ask the salesperson to show you how to perform various functions critical to your business. Some vendors will only show you the end results because the processes to get there are cumbersome. Look at all features/functions of the software that interest you

and your project selection team.

Interview the vendor

Working with a great product without the backing of a great company makes for a frustrating endeavor. You will be working with this company for quite some time, so get to know them. Ask if you will be dealing with a project team or random individuals during your implementation, and speak with these people if possible. You should feel comfortable that your personality and business style match the vendor's approach. Additionally, you will want to get the skinny on such important areas as the product warranty, yearly maintenance costs and additional product and service offerings.

Check references

Upon request, vendors will provide references. Be certain to call as many as possible. Ask detailed questions concerning their experience with the product and the vendor. Questions include: What does your company do? How many employees are there? What software were you using prior to changing? What other products did you look at? What made you choose this vendor? What version of the soft-

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