



QMS Software Buyers Guide

A definitive guide to selecting the right QMS software vendor

Investing in a new Quality Management System is a long term investment. This document will help you evaluate each software solution and the service which supports it.



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Before embarking on your Quality Management software purchase journey, it's important to really understand what you need, and which vendor is best positioned to deliver your exact requirements. This guide takes you through 8 simple steps to a straightforward selection process, helping ensure you make the right decision:

Step 1. Define your needs

Step 1, is all about defining your requirements. Ask yourself 4 key questions, and be as detailed with your answers as you can;

- ✓ What do you want from the software?
- ✓ Who will be using it?
- ✓ What key features **must** it have?
- ✓ What's my budget?

Remember, if you don't ask you don't get. Giving yourself a clear requirement specification means you can provide detailed information to your vendors. They will be far more likely to hit your sweet spot.

Step 2. Longlist your Vendors

Find your vendors; scour the web, get recommendations, read blogs then make your initial enquiries. Gather together an initial longlist and ensure you actually speak to each vendor. Get a feel for the organisation and level of customer care, and finally, ensure they're happy to provide you with a rough estimate on price. There's no point viewing a software demo for a product that's way over budget.

When compiling your longlist, ask the below questions;

1. Does the software satisfy your most important requirements?
2. Does the vendor offer excellent support and speedy service?
3. How easy/complex is the implementation?
4. How user-friendly is the solution?
5. How compelling are the vendor's testimonials/reviews?
6. Does the vendor have customers similar to you?
7. How customisable is the solution?
8. Is the solution within budget?

Step 3. Shortlist your Vendors

You've spoken to everyone on your longlist, now's the time to narrow down your vendors and compile your shortlist. Vendors that achieve high scores in your above questions should go on to your shortlist and be kept in mind for a demo.

Remember to keep the number of demos down to a maximum of 4 vendors, any more than this and the solutions can all blur in to one.

Step 4. Create Scenarios

You've got your shortlist of 3 or 4 vendors. Before you get in to your demos make sure you are prepared. Using real scenarios to describe tasks that you need to accomplish when using the system is a great way to see a system in practice, solving a real life problem.

Example: a scenario during a document manager demo could be "*managing a controlled change to a policy or procedure*".

Think of a number of scenarios that you'd like to see during each demo, and share these with each vendor prior to the demo so that they can prepare and tailor the demo if needed.

Step 5. Create a Scorecard

A score card helps you to keep note of the things you liked, and the things you didn't when viewing a demo. It's key in helping you to rate your vendors, and ensures that you're in control of what you see during a demonstration. Create a scorecard by listing your key requirements, and scenarios, and then provide a mark out of 5 for each. Remember to *share* with your vendor the elements of your scorecard that outline what you want out of the software.

Step 6. Focus on the Demo

- ✓ Your vendor will know what problem you are looking to solve,
- ✓ And, will have reviewed and prepared the demonstration against your predefined scenarios



Have your scorecard at the ready. If there are others from your team who are also viewing the demo, ensure they too have a copy of the scorecard. Complete the scorecard, and keep the vendor on track if they miss out any key scenarios.

Step 7. Evaluate

Ensure you've fully completed the scorecard then speak the rest of the team involved. Collate the general feedback and rate against your other demo scorecards.

Step 8. Talk to References

All being well, if the demo ticked most of your boxes now's the time to approach the vendor to ask for references. Key questions to ask the referee:

1. What was the true cost of the software (including upkeep and maintenance)?
2. What's the quality of the support you receive from the vendor?
3. Have you experienced any bugs or problems with the software?
4. How, specifically, has the solution cut costs or improved efficiency (or has it)?
5. What does your company receive 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 9. Decision Time

At this point you may have made your decision, or may be stuck between two vendors, if you're torn...

1. Carefully evaluate your references and the answers to their questions.
2. Re-evaluate your original requirements, where do both vendors sit?
3. Customer service, which vendor really shone? Remember QMS software is a long term investment; you need to ensure you work with a team that shares similar values to you, and whom you can trust to deliver.
4. Budget? How do the two compare. If a vendor is over budget, is the additional cost warranted?
5. Finally, if you need to, request a further demo to help cement your decision.



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More information?



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