



## **A Guide to Finding the Best Software for Your Organization**



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## Who Should Read this Book

Your company is in need of a new software solution; you are a business owner, stakeholder or a member of a steering committee involved in the decision making process. This book will help you navigate through the process of selecting the right software vendor.

For over 25 years, BAASS has been assisting small and medium sized businesses acquire new and/or replace outgrown business software solutions. They include, Accounting/Finance (ERP), Customer Relationship Management (CRM), Business Intelligence (BI), Warehouse Management (WMS) and Human Resources (HR).

With thousands of projects completed, we wanted to share some best practices that prospects and clients should follow to ensure their greatest chance of success. We understand that most clients will seldom participate in numerous software selection processes. The key to mitigating the business risk involved with these projects and securing a return on your investment is to create a strategy and a blueprint for success up front.

The information contained in this document provides you with a framework to follow based on many years of implementing projects for small and medium enterprises. We hope you find the information valuable and may your project be a success!

## **Some Tips before you start:**

1. Will the business solution impact different departments in the organization? If so, consider the formation of a steering committee that includes a representative in each of the areas that will be impacted, including IT.
2. Create a functional list of “needs” and “wants” for each area. Prepare a Needs Analysis that addresses each of the functional areas so that you have a clear picture of what is required.
3. Need to determine what your budget is going to be. Include hardware requirements, professional services for software installation, training and configuration. Lastly, determine what recurring expenses will be required to keep the software up to date.
4. Be strategic when deciding what to purchase. Consider what strategic plans the organization may have in place including expected growth, acquisitions, transaction volume, among others.
5. Does the solution have extended offerings that can be added at a later date? For example, you may be looking for an accounting solution, but future needs may include a solution for customer service, sales automation or business analysis. Strong consideration should be placed for software publishers that offer these additional integrated solutions out of the box.



### **What to look for in a Software Publisher:**

1. How long have they been in business?
2. What markets and size companies do they serve?
3. How financially sound is the company?
4. Depth and breadth of product and service offerings.
5. How long has the product been in the market?
6. How many end users do they have?
7. Are clients supported by a reseller channel, direct with them or do they offer both?
8. What is their commitment to Research & Development - how often is the product updated?
9. Is the product easy to integrate with other solutions?
10. Are they using standard industry platforms and technologies?



## **"Show Me, Don't Tell Me" Stage**

1. Once you have documented your requirements and have several potential vendors, request a demo of the product. A live demo would be preferable but remote demos will suffice at this stage.
2. Provide prospective vendors with a list of your specific requirements so that you can determine how the software addresses your needs.
3. Divide the demo by functional area and ask end users to attend. This is critical for two reasons. First, they will feel like they were part of the decision-making process and you will get an easier buy-in. The other is that user adoption is critical to the success of a project. Ease of use and navigation will be important to them since they will work with the product on a daily basis. End users tend to be more granular and will uncover strengths or deficiencies in the product that you may have missed.
4. Depending on the size of the project and amount of investment required, you may consider a prototype before committing to a purchase. This is typically handled as a separate engagement. However, you will be able to mitigate your risk by seeing your converted data in the new system and going through business scenarios that are relevant to the users.
5. Once you have a preliminary decision on which product you like, it is time to consider which business partner to use.



## **Summary**

Selecting the right software solution is the first step in achieving a successful project. In our white paper, "How to Select the Right Business Partner" we will address how to choose the right firm that will help you install, configure and train your team.

If you require any assistance, please contact us at 866-260-5302 or visit us at [www.baass.com](http://www.baass.com).