Choosing a new software platform is no easy task; whether you’re selecting a document management system, a donor management system, an accounting package, or otherwise, the process is positively daunting. What’s worse?

**IMPLEMENTING A SOFTWARE SOLUTION THAT IS A POOR FIT CAN POSITIVELY CRIPPLE YOUR ORGANIZATION’S OPERATIONS**

To help you get on the right track with your own software selection project—and to break it all down in a way that is more digestible—we’ve put together the following checklist that hits on the key elements of the process.

**Key Elements of Successful Software Selection**

- **CHART YOUR NEEDS.** Before you begin comparing options, make sure you have a firm grasp of what features you absolutely must have, which would be nice to have, and which you could do without entirely. Map them out in a matrix. This will include pieces like:
  - **Usability.** Are there certain interface requirements that you’ll have given your team’s workflow or technical abilities? Is there going to be a massive learning curve?
  - **Functionality.** *Will it do everything you need it to do?*
  - **Reporting.** Is this offered? Can you control access?
  - **Access.** Do you need to be able to access it remotely? From mobile devices?
  - **Integration.** Does it integrate with your billing? Your website? Your email? Does it need to?
  - **Support.** What sort of support is available? Email only? Phone? *When* is it available? Will it cost you extra?

- **RESEARCH.** There is a lot of legwork here. You’ll have to put in time to research online, make phone calls to vendors, and make phone calls to references. (Don’t forget that this can be outsourced.)

- **GET A DEMONSTRATION.** See the solution in action. Have them take you through each piece as it relates to your business. Feature lists can only tell you so much about a product.

- **SECURE TRAINING.** Even the best software package will be worthless if your people don’t know how to use it properly. Make sure you get your money’s worth, and make sure that your team is comfortable using the platform.

Questions? Give our team a call at 240-499-7900 and we’ll see how we might be able to help. Or, shoot us an email at info@optimalnetworks.com. Best of luck on your hunt!