Features checklist

be the business

Functionality

What should the new system help you make happen?

What existing process will it improve or enhance?

How many people will use it and how often?

What do you need the software to do?

Do you operate in multiple locations and do you need software to support this?

Do you need the software to work across multiple languages, currencies, tax regimes or regulatory environments?

Will you need helpdesk support for the software in all the geographies relevant to you?

How does your business operate?

Are there any requirements you absolutely cannot budge on?

Are there particular features that might make you raise your budget?

How flexible are your requirements?

Specialisation

Have you considered whether you want off-the-shelf, customised or bespoke software?

Are you happy with off-the-shelf software which is likely to be cheaper, but may require you to change some processes?

Or would you prefer to pay more for software which is tailored to your business? Would you be willing to spend time and money maintaining and upgrading a custom-built software

Are you willing to tie yourself to a single supplier?

Can you develop an in-house solution?

Do you have in-house specialists who can develop and maintain custom-built software for you? and sustain it for the long term, What would you do if your in-house specialists leave?

Is it more worthwhile focusing your in-house specialists on something else?

Is there any reason why standard software might not work for you?

What is truly special about your sector or your business, which might mean standard software cannot work for you?

Do other businesses in your industry use specific software?

Are there any special circumstances in which your staff will use the software? For example, do you need it to support voice integration for hands-free use?

Compliance & security

Do your security needs go beyond those of a 'standard' business?

Do any of your clients require advanced security, or for data to be handled in a certain way? For example, do you do any work in the defence sector, or the care sector?

What security needs do you and your clients have?

Do you need to choose software which is approved by a regulatory body, or complies with particular standards?

Are there industry or sector-specific regulations you need to be compliant with?

Integration

Will you be adding other software or systems in the near future you might want to integrate with?

What will this software need to integrate with?

Is there anything you can learn from your experiences with the previous software?

Do you need to transfer data from an old system to the new system? How will this work?

Is this new software replacing old software?

Infrastructure

What infrastructure do you already have in place?

Will the new software work with your Macs, PCs, Android phones or iPhones?

If you're choosing cloud-based software, do you have a reliable enough Internet connection?

If your new software requires new technical expertise, do you have this in-house or will you have to bring this in?

Does the software you're considering create any new requirements?

Would you be happy to add new infrastructure if it adds additional capabilities to any system?

People & stakeholders

What software would be most appropriate for your staff?

How might the software impact day-to-day roles?

What help will users need to transition to new ways of working?

Will any users have specific requirements you'll need to consider?

Will you involve users in the selection of software?

What impact, if any, might the new software have on the culture of your organisation?

What software would be most appropriate for your clients or partners?

How might new software change their experience of working with you?

Do they have particular needs to consider?

Support & implementation

Do you want a supplier to offer support themselves, or are you happy to work with a partner?

What help will you need to set up and implement the software?

Would you want a partner to deliver training? Or would you want to arrange it yourself?

What training will your people need?

Do you have the capability and capacity to support the software internally?

If you need external support, what level of service do you need? How critical is the system and how much downtime is acceptable?

How do you want to support the software?

Future needs

Are increases in usage likely? For example, will you need more licences, or more volume? Can the software support this? Can the provider?

What changes in requirements are likely as you grow? For example, additional functionality, new geographies, improved customer service.

What are your future growth ambitions, and how will the software you're considering accommodate this?

Are your required service levels likely to change? Will a provider be able to deliver this?

How might your plans impact the ongoing support you might need?

Type of supplier

Do you want to purchase a product, or do you want to undergo a consultative process where a provider helps you implement and optimise?

What values and behaviours are you looking for in a provider?

What kind of suppliers are you looking for?

What level of customer service are you looking for?

Are you prepared to accept less intimate customer service in return for an established product which may have better support, or would you rather accept the risk of a smaller provider who you may end up tied to?

Would you prefer a large provider where you are a relatively small customer, or a smaller provider where you may be a large customer?

Budget

What's your budget?

How much can you spend up front?

If you're paying a supplier to custom-build your software, will you be paying them for their time or for a final workable deliverable?

How much can you spend on ongoing support such as ongoing training, updates and maintenance?

What's your contingency plan?

Do you have a buffer in your budget for unforeseen expenses?

How much benefit will the software have to deliver to cover its costs, how soon do you need to see these benefits and what's your exit strategy if it does not deliver?

Now you've defined the things you're looking for from new software, you're ready to start researching products.

You're in Step 3 of the SME Guide to Choosing Software. For more templates and guidance please go to **bethebusiness.tools**

1. Setting your objective	2. Justifying your budget	3. Creating your shopping list	4. Buying with confidence	5. Making it work for the team	6. Getting your money's worth