

## Step 1: Do an ROI check

**When?** Monthly or quarterly for the first 6 months

**How long?** Allow an hour

**Who?** You

This involves going back to your business case and ROI projections (from Step 2) and comparing it to the actual benefits the software has brought you. You can do it quarterly if you prefer.

## Step 2: Run a 'Lessons Learned' workshop

**When?** Around 2 months in

**How long?** Allow 2 hours

**Who?** You, managers, users (or user representatives)

This is a good way to get a broader view on how the new software is doing, giving all users a chance to express their views, share knowledge and see if more training or support is required. It's also a good time to review the purchase and implementation process too: what could have gone better? Here's a rough agenda you could use:

- Are people using the new system? All of them or just some?
- Are they using it the way you intended?
- Did the implementation period ever really end, does the new software feel embedded?
- Are people still leaning on old ways of working?
- How successful are your support resources? Do you need more?
- What impact has the new solution had on staff? Has anyone's role changed significantly as a result?
- Have there been any unintended consequences, positive or negative?
- Have new issues become apparent, e.g., skills shortages have been revealed which you may not have been aware of?

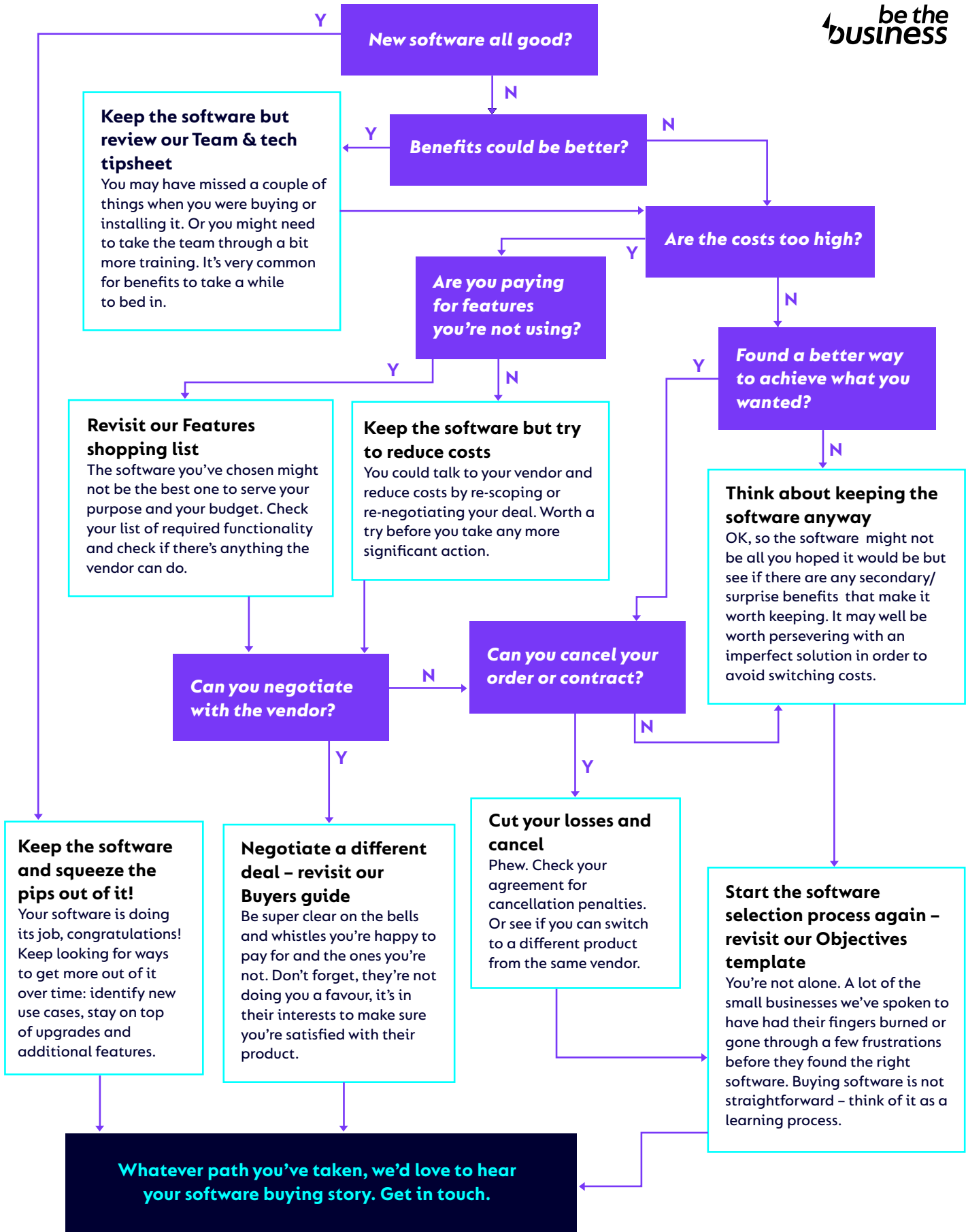
## Step 3: Decide what to do next

**When?** 6 months in

**How long?** Allow 2 hours

**Who?** You, senior managers, finance team

After your ROI check and workshop, you'll have a good idea of how successful – or otherwise – your software purchase has been. That brings you to our software decision tree.



You're in Step 6 of the SME Guide to Choosing Software. For more templates and guidance please go to [bethethebusiness.tools](https://bethethebusiness.tools)

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