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Jessica De Pinto's

MARKETING PORTFOLIO

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A GUIDE

Finding the Best Software for Your Organization



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WHO SHOULD READ THIS?

If 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 document will help you navigate through the process of selecting the right software vendor.

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 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 upfront. The information contained in this document provides you with a roadmap to follow, based on many years of implementing projects for small to medium enterprises.

For over 25 years, BAASS has been assisting small to 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 both prospects and clients should follow to ensure their greatest chance of success.

TIPS Before You Start

- ✓ 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, finance, HR and more.
- ✓ Create a functional list of needs and wants for each area. Prepare an analysis directed toward your organization's needs, which addresses each of the functional areas so that you have a clear picture of what is required.
- ✓ Determine what your budget is going to be. Include hardware requirements, professional services for software installation, training and configuration. Also, keep in mind to decide what recurring expenses will be required to keep the software up to date.
- ✓ Be tactical when deciding what to purchase. Consider what strategic plans the organization may have in place including expected growth, acquisitions, transaction volume, among any others.
- ✓ 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 even business analysis. A strong consideration should be directed toward software publishers that offer these additional integrated solutions out of the box.

10 THINGS 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 to allow you to 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 test for issues that 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 the user 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 toward achieving a successful project. At BAASS, we can assist you through the implementation of the appropriate software to your services, allowing your organization to reach its maximum potential.

In our white paper, "How to Select the Right Business Partner", we further address how to choose the right firm that will help you install, configure and train your team.

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Webinar Presenter:



Don Thomson,
CEO,
TaiRox Software Inc.

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TaiRox Software Inc. has been a Sage 300 Development Partner since 2009. TaiRox's best-selling product, Productivity Tools, adds hundreds of features to Sage 300. Don Thomson, CEO, is a founder of the original Accpac development company.

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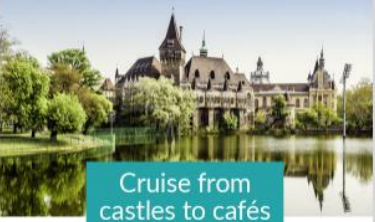
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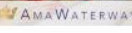

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