

## Action plans



### Step 4 – Buying with confidence

Your efforts in creating an informed shopping list based on thinking about key considerations such as functionality, integration, ongoing support and future needs means you're now ready to take the next step and engage with potential suppliers directly.

However, rather than rushing in and undoing a load of hard work by making an impulsive decision, we have three key steps it is important to undertake at this stage. You need to get past supplier sales spin with questions about pricing, support and free trials.

- **Effort:** High
- **Impact:** High

#### Step 1:

Get quotes and zoom in on pricing models. Once you've found suppliers you think you can work with, get a detailed proposal from each of them, even if you're buying off the shelf.

- **Impact:** High
- **Why this will help:** There's only so much information you can glean from a website. Speaking with someone directly will allow you to get proper answers to questions relating specifically to your business. How well they listen or absorb your specific needs is a good indicator of the kind of relationship you can expect post-purchase. Our step-by-step buyers guide will help you through this action plan.

#### Step 2:

Having covered functionality, it's now time to tackle specialisation. At this point, using our checklist, you'll be asking yourself questions such as: can you develop an in-house solution and is there any reason why standard software might not work?

- **Impact:** Medium
- **Why this will help:** Upfront payments, subscription costs, maintenance services and legacy integrations all make for a confusing set of numbers if you're relying on what appears on a supplier website. Ask specific questions and you'll get the answers you need to be properly informed.

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### Step 3:

Trial the product. Once you've identified a preferred product and supplier, you should trial the product or at least see a demo. It's very difficult to get a real impression of what a system will be like within your organisation before you use it.

- **Impact:** High
- **Why this will help:** Some services will come with a requirement to be locked in for a certain period of time. A trial period can help overcome the issue of buying a product or service that isn't actually the right fit. You can also get valuable feedback from your team that can help with final negotiations such as the number of registered users.