Step 3 – Creating your shopping list

It's now time to drill down into detail on your requirements and start exploring potential suppliers. Knowing what features and functionality you're looking for will help you filter out products and suppliers more effectively – and get to a good shortlist more quickly. It also helps to gather your thoughts before you speak to salespeople.

After completing this action plan, you should have clearly defined your requirements and have potentially narrowed down a solution(s) and/or supplier(s).

The first step of creating your shopping list is to use our features checklist – a series of questions that can help you identify exactly the right software for you. You'll see that these questions are not all about technology - they're designed to help you understand your business requirements, so you know exactly how your software will fit in.

- **Effort:** Medium
- **Impact:** Medium

Step 1:

Starting with functionality, you'll need to ask yourself questions such as: what do you need the software to do; how does your business operate; and how flexible are your requirements?

- **Impact:** Medium
- **Why this will help:** Every business is different and, therefore, you can't take a boilerplate approach to defining what will best suit your company's individual needs. Taking the time to break down, consideration by consideration, the variables you're likely to encounter will ensure, when you do get integrating, you stand the best possible chance of succeeding and being able to truly exploit the technology's potential. For this action plan you'll need to make the most of our features checklist first, and then research guide.

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:** Taking the time to break down, consideration by consideration, the variables you're likely to encounter will ensure, when you do get integrating, you stand the best possible chance of succeeding and being able to truly exploit the technology's potential.

Step 3:

It's an issue that's tempting to skirt around, but, at this point, ask yourself compliance and security questions such as whether there are industry or sector-specific regulations you need to follow.

- **Impact:** Medium
- **Why this will help:** Taking the time to break down, consideration by consideration, the variables you're likely to encounter will ensure, when you do get integrating, you stand the best possible chance of succeeding and being able to truly exploit the technology's potential.

Step 4:

Integration is a big part of making any new tech adoption successful. So, asking yourself whether there is anything you can learn from your experiences with previous software will help flag at an early stage any issues that might arise.

- **Impact:** Medium
- **Why this will help:** Taking the time to break down, consideration by consideration, the variables you're likely to encounter will ensure, when you do get integrating, you stand the best possible chance of succeeding and being able to truly exploit the technology's potential.

Step 5:

Will the new software work with your existing hardware? If you're choosing cloud-based software, do you have a reliable enough Internet connection? This is the time and place to look at your existing infrastructure in detail.

- **Impact:** Medium
- **Why this will help:** Taking the time to break down, consideration by consideration, the variables you're likely to encounter will ensure, when you do get integrating, you stand the best possible chance of succeeding and being able to truly exploit the technology's potential.

Step 6:

People are a big, and often overlooked, part of new technology applications being successful. Asking you and other decision makers what, if any, impact the new software might have on the culture of your organisation will identify areas of concern to watch.

- **Impact:** Medium
- **Why this will help:** Taking the time to break down, consideration by consideration, the variables you're likely to encounter will ensure, when you do get integrating, you stand the best possible chance of succeeding and being able to truly exploit the technology's potential.

Step 7:

It's time to think about support/implementation. 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?

- **Impact:** Medium
- **Why this will help:** Taking the time to break down, consideration by consideration, the variables you're likely to encounter will ensure, when you do get integrating, you stand the best possible chance of succeeding and being able to truly exploit the technology's potential.

Step 8:

While it might be tempting to focus on the needs your business has right now, it's also valuable to cast an eye to the future. What changes in requirements are likely as you grow?

- **Impact:** Medium
- **Why this will help:** Taking the time to break down, consideration by consideration, the variables you're likely to encounter will ensure, when you do get integrating, you stand the best possible chance of succeeding and being able to truly exploit the technology's potential.

Step 9:

Answering some questions about the type of supplier you want to engage with will help direct your shopping list towards either a smaller operator, which can provide a more tailored service or a larger, more established vendor with a track record.

- **Impact:** Medium
- **Why this will help:** Taking the time to break down, consideration by consideration, the variables you're likely to encounter will ensure, when you do get integrating, you stand the best possible chance of succeeding and being able to truly exploit the technology's potential.

Step 10:

It's finally time to think about your budget, not in excruciating detail but in a way that helps shape your research and buying. How much are you willing to pay for up front? Do you have reserves in case unexpected costs arise?

- **Impact:** Medium
- **Why this will help:** Having looked in more detail at your specific needs and requirements it's now possible to wrap a budget around your technology purchase.

Action plans

Step 11:

Once you've defined the things that you're looking for from your new software, you're ready to start considering different products and suppliers.

- **Impact:** Medium
- **Why this will help:** Successful software shopping starts with research. It's worth investing time in this phase to arm yourself against the hard sales pitches you'll get from vendors. Not all sources of information are objective and unbiased. It's a crowded marketplace and all the vendors are making lots of noise about their "innovative, unique, turnkey solutions".