INTRODUCTION

Real wisdom comes from investigation. Lucky for you, then, that we’ve researched the essentials on how to evaluate any purchase of business software.

Use this sheet as a pre-purchase checklist. It shows the key issues and questions to help you make the wisest, most-informed decision on any ERP.

WHAT’S THE PROBLEM?
- What are the pain points – profits, processes or people?
- What are your short, medium and long-term goals?
- What’s needed to achieve your goals?
- Which software best suits those who’ll use it?

WHICH PRIORITIES?
- Are your needs business-critical or mission-critical?
- Is it about reporting or regulatory compliance?
- Do you need flexibility and ease of use?

SECURITY
- How will your data be secured?
- Who is able to access it, and how?
- Who is ultimately responsible; you or the vendor?

RESEARCH
- Read prior case studies.
- Which businesses have used the solution?
- Speak to vendor referees.

IMPLEMENTATION SUPPORT
- Will the product integrate with your existing systems?
- Who integrates it into your business?
- Who will use it?
- Who will train them?

SCALABILITY
- Can it grow with your business?
- What’s the scaling cost?
- Will it accommodate industry and technological advancements?

COST-BENEFIT ANALYSIS
- Make a CBA report.
- Benefits v Costs = Price Point.
- Short, medium and long-term costs of all options.
- Factor-in hardware and vendor training fees.

AFTER-SALES
- Who fixes glitches and issues?
- How is support provided?