



SUPERCHARGING SOFTWARE A WORKBOOK SERIES FOR TECHNOLOGY LEADERS



The Selecting Process



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WORKBOOK SERIES

Getting the most from your technology is more than checking boxes off a list. It's about getting a real understanding about what you need. It's not just about what the software can do; it's about what it can do for you.

There are different points throughout the software process where companies get stuck. Software is not a one-size-fits-all solution, so to get the most from your software, you need to take a deep dive into your use case. So, how do you do that?

At Faye, we eat software. We eat the complexity and are shooting out a series of questions for you to answer to truly unlock your software's full potential.

SELECTING PROCESS

Buying and implementing a CRM is a big decision for any company. There are many factors to consider. It's not just about the bells and whistles of new software. It's realizing your current system isn't working anymore, identifying the goals you'd like to achieve, and finding the solution that will tackle your current challenges.

The problem is, most often, businesses get excited about the chance to jump at something new, they jump too far, too fast. Whether they saw an ad for some shiny new software solution, or want to use the software they used at their old company, people are easily distracted by the vendor. The truth is, we see a lot of companies purchase software and then have no idea how to make it meet their needs.

This Supercharging Software Workbook Series walks you through the questions you need to answer at each stage of software: selection, implementation, integration, adoption, and optimization.

It's a roadmap for you to break through some of the sticking points most common during the software process. You may only need one of these workbooks, or maybe all five. Regardless, don't get tied down, cut through the complexity. Let's kick this process off with Step 1: Selecting.

Instead, when thinking about new software, that's the time to do an internal audit of what your current situation is, then take a look at the software options on the market. Answer these series of questions honestly and purposefully to get the most from the software selection process. There are two phases to this process.

PHASE 1:

Questions to Work Through with Your Team Prior to Going to the Marketplace:

1.

Do you need a full reboot, or can you do an upgrade?
Take stock into what your current system is doing or not doing. If a few targeted add-ons can get you where you need to go, then you may not need a full reboot. Check in with what's available with your current system first.

2.

How is your current software failing you?
What are the biggest pain points in your current software? Ask your users this question too, don't just assume. Users and managers may have different answers, but it will help shape your use case.

3.

What are your goals for the new software?
Once you identify where your current system is lagging, you can start to build what you want your new system to do.

4.

What business processes do you want to improve?
What processes do you have that you want to automate?

5. Who should be involved in the selecting process?
While having one decision maker keeps things on pace, it's important to get input from users. The more input they have, the more likely they will want to use the system...and the more likely it will actually be helpful for them.

6. What resources do you want to integrate into the new system?
Are you planning to integrate data? For instance, do you want CRM and ERP data to connect?

7. What's your budget? While everyone has a dream solution, you want to be realistic. What is your overall budget? Can you breakdown implementation into phases to help with costs?

8. Who gets the final say about your software selection? Getting input from various teammates will give you a stronger idea of what you really need. Yet, if there isn't one decision maker, it's easy to send your software project into the weeds before you even get started.

9. Who's the task manager for software project? Some companies choose to have the decision maker and task manager be the same person, while others decide to have someone in charge of putting together all the information and present it to the final decision maker. What resources do you have in house? Regardless how you set this up, setting up responsibilities will help keep your software selection on track to assign a task manager.

10. How will you get your C-Suite and team members onboard with this change?
Software is only as good as its usage. How is this new solution helping with cost saving, efficiency, lead generation?

PHASE 2:

Questions to ask about and to the software vendor:

1. Does the software serve your type of company? Does it focus on small businesses? Enterprises?

2. Does the software specialize in your industry?
If not the software itself, does it have an integration partner that does? What kind of partners does that software have for you to work with that can specialize in your needs?

3. Is the software scalable?
Can you roll out different phases and grow the system as you grow your business?

4. Is the software customizable? Are there applications or integrations you can add to your instance that fit your need? Or just standard packaging?

5. What's the support's level of quality?
What's their response time? Is it 24/7?

6. Does it have all the features you require within the tier of your budget?
Don't get swept away with top-tier capabilities if you can't afford them.

7. What are the software's integration options?
Can you integrate CRM with your ERP and marketing automation systems? What about Accounting software (like QuickBooks), TMS, POS systems, or email?

8. What's the user experience like?
Does the system have mobile access? How difficult is it to navigate it?

9. How does the system protect your business data?
Do they have security partners? Any recent data breaches?

10. Does the software allow you to meet your goals and ease your workflow?
Remember, don't get caught up in all the bells and whistles.

11. Does it have reporting capabilities that match your needs?
Check out reporting options before you sign up.

NEXT STEPS

You can find the perfect solution for you after you put in the work to find it.

After answering the above twenty questions, you'll be able to find the absolute best solution *for you*.

Yet, selecting your software is only the first step of the software process. If you want smooth sailing through adoption, check out the next Supercharging Software Workbook: Implementation.

Go to www.fayedigital.com/resources for more education.



At Faye, we love software. We eat it, breath it, and build it. Our mission is to make the best software in the world even better by helping clients lead the way with software strategy, deployments, integrations and technical support.

With us is better than without us. As an Inc 5000 award winner 7 years in a row, we help mid-market and enterprise clients globally achieve up to 10x productivity returns by leveraging the hidden potential within Zendesk, SugarCRM, Salesforce, HubSpot, and more.

There is no ceiling to what we can achieve with a lot of caffeine and an uncompromising commitment to make software better. We are intensely passionate about eating your software complexity and challenges, so that you don't have to.

Our flagship offering, AXIA by Faye™ bundles our IP, capabilities and pre-built software enhancements into one monthly or annual subscription. The result-A partnership that drives lasting value and optimization even as you grow.

**WE EAT
SOFTWARE**

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