



Software

selection

checklist

## Six steps to help you make the right choice

There are few responsibilities that instill quite as much fear and grief in leaders like replacing software systems.

It might be because of past experiences gone wrong, or the overwhelming number of solutions available, or even the ramifications around making the wrong choice. Sometimes leaders get paralyzed and opt not to make any changes, so their organization continues to scrape by with outdated systems.

The solution here is to take the fear and grief out of software selection — to recognize that success can be achieved by using a methodical approach. That's why we've created this six-step checklist. On the next page, we lay out the stages and milestones required for your organization to find a solution that optimizes value and helps you achieve your vision.

**WIPFLI**

## 1. Identify your goals

Step one is to lay a solid foundation by clearly defining the why, what and how of your organization's needs. This will make it so much easier to evaluate potential solutions.

If the why is a growing footprint and the need to give easy systems access to a number of offices, then a cloud-based application may be the best fit. If customer self-service is driving your decision, then an intuitive user interface and robust security may bubble to the top. Identifying your strategic needs will help guide the process from start to finish.

## 2. Gather data

The next step is to challenge stakeholders in your organization to identify what you require from a new system.

It's important to remember that you are not redesigning your old system.

Instead, you should identify key business processes that will give you competitive advantages in the marketplace. By identifying and prioritizing these key features, you can target a software package that excels at executing these market-differentiating processes for you.

## 3. Document

One of the most critical steps in evaluating new software is making sure the software providers fully comprehend what you are looking for. By giving them an understanding of your organization's background, needs and vision – plus the goals of the project – you can give them much-needed context around your overarching strategy.

Also, if you add detailed feature requirements and day-to-day process use cases, the providers can show and tell you how their solution can drive value for your organization.

## 4. See for yourself

Once you've narrowed your search down to a few potential solutions, ask the software providers to come to you and show you how the system will work. Provide specific processes and ask them to walk through the system so you can see and feel how it will work firsthand. This will help prevent the providers from showing you a standard demo filled with features they typically highlight and generic use cases that don't help you picture the software in place at your organization. You need to see the system in use with your own processes before moving on to the next phase.

## 5. Decide

This seems like the most difficult step, but if you've moved through steps 1–4, actually making a decision is a validation of the process to this point, not a leap of faith. By checking the boxes on organization strategy and overall system requirements and putting the system through a vigorous demonstration script, you should have a framework for making the correct decision.

## 6. Communicate

While software selection is challenging for the team tasked with choosing the new system, any new software rollout is disruptive to your employee base, too.

Even if the implementation goes 100% according to plan, they will have to adapt to changes to their daily work. The key to making changes less disruptive is communication. Even in the early selection stages, information shared with employees can set the stage for future adoption. It also helps employees begin to accept that change is coming and they will be involved in the journey along the way.

## Let's get started

Wipfli can be your guide through every step of the process, providing added peace of mind that you've identified your needs and the right system to meet them. Contact us to learn more about our software selection services or to get started.

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