

CHORTEK
CPAs | BUSINESS ADVISORS

SELECTING A NEW BUSINESS MANAGEMENT SYSTEM
CHORTEK BUSINESS TECHNOLOGY CONSULTING EBOOK

BEFORE YOU BEGIN THE PROCESS

First and most importantly is to create a steering/selection committee that is represented by individuals throughout the organization. This committee will be the resource to move the company through a successful selection by representing their functional area, defining the requirements, evaluating software against those requirements and be an advocate for the software chosen. Much higher success (based on completion of selection and implementation within a timeline) is achieved with a committee versus just accounting or IT involvement.





DOCUMENT YOUR NEEDS

Most companies will start searching for software when they really don't know what they're looking for. Thoroughly documenting your current processes and procedures will allow you to identify what really keeps your business running, identify opportunities for improvement and most importantly, keep you from forgetting critical needs. Gather this information by functional area (invoicing, job costing, payroll) for example.

IDENTIFY YOUR KEY REQUIREMENTS

The ability to print checks is not a key requirement, as all software can, but vendor price-list imports, service history, scheduling, customer asset listing, seasonalized inventory levels, customer discounts based on sales volume and return material authorization are. By functional area, document the key items you need your system to perform. Don't forget reporting, as most businesses have very specific information they need in management reports to make daily business decisions.



RESEARCH POSSIBLE SOLUTIONS

Sage Software (Sage 50 formerly Peachtree, Sage 100 formerly MAS 90/200, Sage 300 formerly Accpac, and Sage X3. Microsoft Business Solutions (Dynamics GP, NAV and AX) and Intuit (QuickBooks) dominate the general software marketplace but you may need to look at specific (vertical) solutions for manufacturing, distribution, service, construction, etc. from Epicor, Infor or Exact. And, you may want to include cloud solutions also known as Software as a Service (SaaS) including Intacct, NetSuite, and Acumatica in your research.

REQUEST FOR INFORMATION

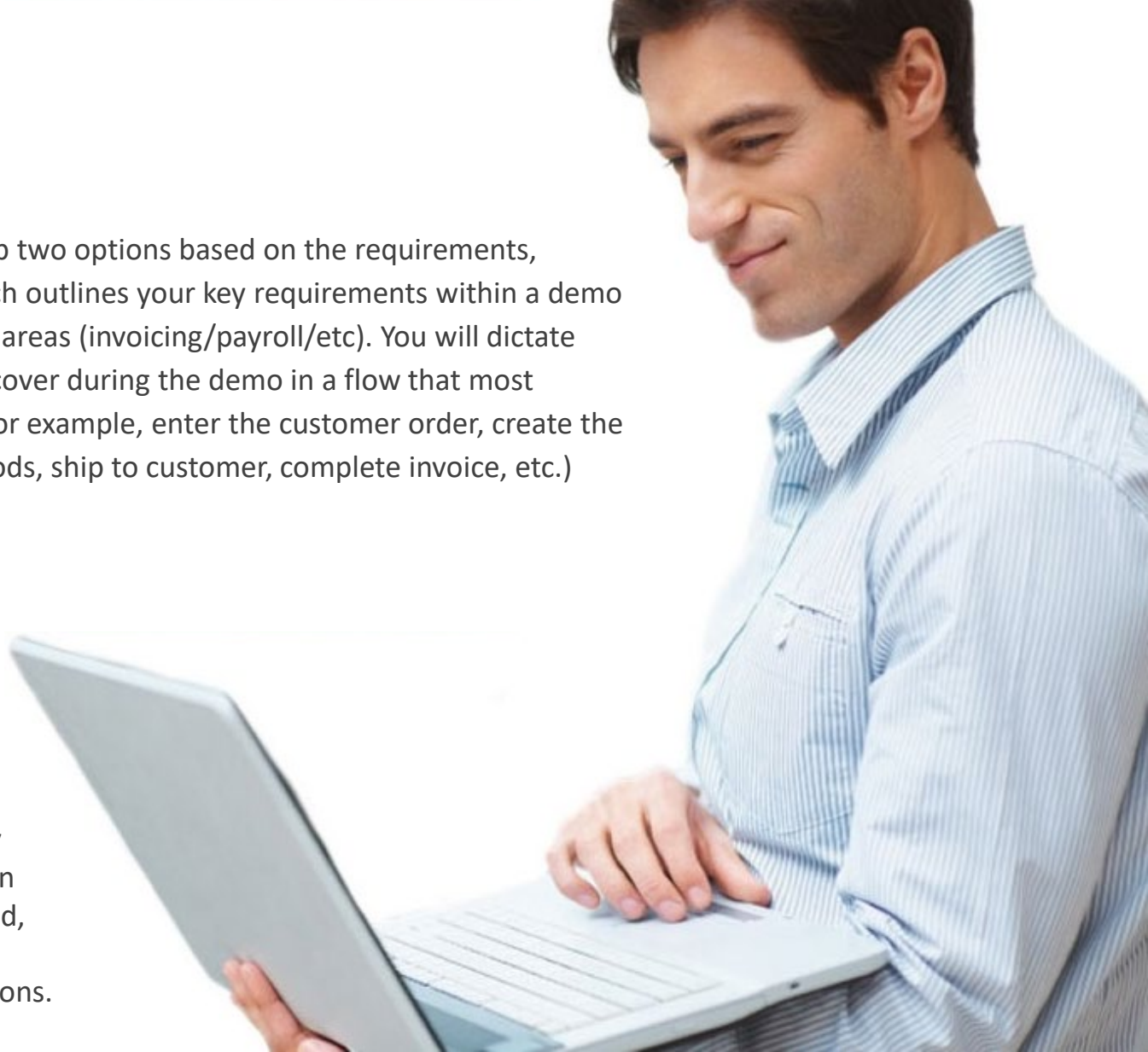
This step involves sending vendors your key requirements and asking them to reply with their ability to meet your needs and the approximate cost for software and implementation for the user count you provide them. Once all replies are received, you will be able to easily narrow the field to the two top candidates.

DEMO SCRIPT

Now that you have your top two options based on the requirements, prepare a demo script which outlines your key requirements within a demo focused on your functional areas (invoicing/payroll/etc). You will dictate the items the vendor is to cover during the demo in a flow that most resembles your business (for example, enter the customer order, create the purchase order, receive goods, ship to customer, complete invoice, etc.)

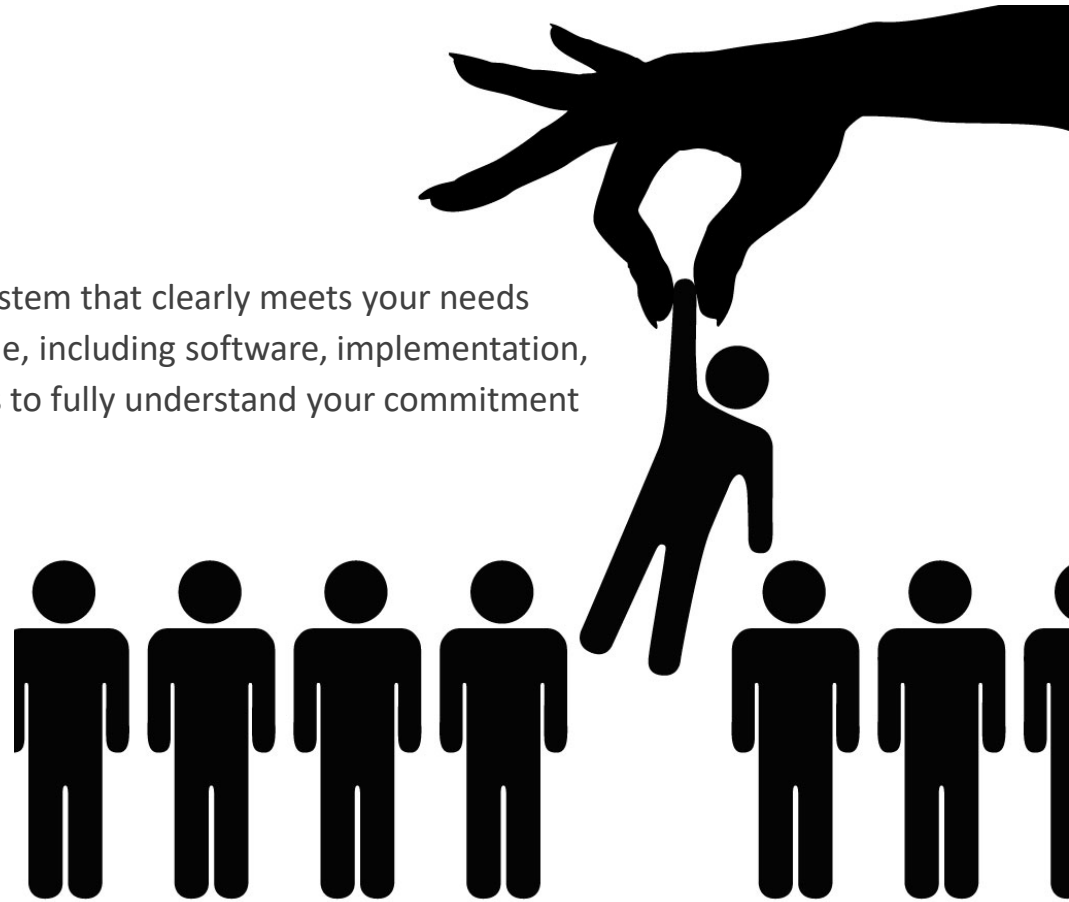
CONDUCT THE DEMO

Using your demo script, schedule vendors for half-day or full-day demos so they can prove to you that they can deliver on what they promised, allowing an apples-to-apples comparison of possible solutions.



FINALIZE SELECTION

After the demos, you will usually find one system that clearly meets your needs over the others. Finalize the cost and timeline, including software, implementation, training, hardware and annual ongoing costs to fully understand your commitment of resources (cost and people).



IMPLEMENT

Selecting the right software is one thing, implementing it is another. Software is only a tool that takes proper training, resources (people) and procedures to be utilized for its intended needs. A proper implementation plan will continue you down the road toward success.

While companies with proper resources can perform these searches on their own following these steps, many choose to hire an outside facilitator with the experience, tools and templates to set a realistic timeline and provide expertise about vendors. Sometimes, solutions look good on paper and in a demonstration, but in practice, some companies offer much more in customer support and implementation after the sale is made.

If you have questions or would like to discuss the steps involved in selecting a new Business Management System, please contact me.

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Chortek has been helping businesses manage their technology investments for over 25 years. Our suite of offerings includes customer relationship management (CRM), Sage, and Job Ops software solutions. We also assist businesses in managing their network services, security and remote access, disaster preparedness, and server deployment. Our team of professionals serves customers throughout the Midwest and across the country.