

Business Software Buyer's Checklist

Use this before you buy HR, ERP, CRM, warehouse or asset management software.

Most software projects that fail do so because of choices made before the contract was signed. Tick each box; anything you can't tick is a risk to fix first.

1. Know why you're buying

- ☐ We can name the three problems this software must solve
- ☐ Each problem has a cost we can estimate (time, errors, lost sales)
- ☐ We know what "success" looks like 12 months after go-live
- ☐ One senior person owns the project and has time for it

2. Map how you work today

- ☐ Our key processes are written down, step by step
- ☐ We know every spreadsheet and system the new software replaces
- ☐ We know who uses each process and how often
- ☐ We've listed what must not change (legal, tax, customer promises)

3. Requirements

- ☐ Requirements are split into must-have and nice-to-have
- ☐ Number of users and locations is known, now and in 3 years
- ☐ We know which other systems it must connect to
- ☐ Reporting needs are listed (what, who, how often)

4. Choosing a supplier

- ☐ Every demo used our real processes, not a standard script
- ☐ Licence costs and set-up costs are quoted separately, in writing
- ☐ We know the cost for 3 years, including support and upgrades
- ☐ We've seen the plan for moving our existing data
- ☐ We know who supports us after go-live, and how fast they respond

5. Before you go live

- ☐ Data has been moved, checked and signed off
- ☐ Staff are trained on their own tasks, not a generic tour
- ☐ We've done a full practice run of a normal day
- ☐ There is a fallback plan if go-live day goes wrong

6. After go-live

- ☐ Support is in place for the first weeks
- ☐ We'll review success measures at 30, 90 and 180 days

Scoring: 20 or more ticks, you're ready to buy. 12 to 19, fix the gaps first and your project will be cheaper. Under 12, start with a short review of how you work; it will save you money.