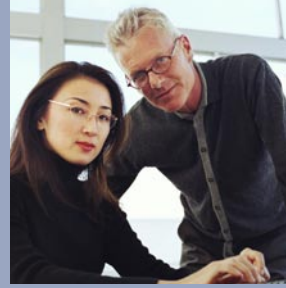
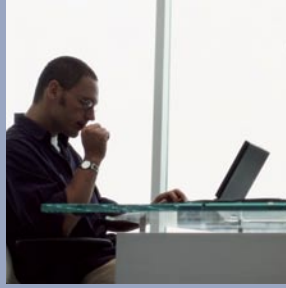


# 10 Simple Steps to find software that fits



# 10 Simple Steps

to find software that fits



## Nobody looks forward to choosing new business software.

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Given the sheer number of software packages available in today's market, the prospect of searching out the best solution can be overwhelming. A mistake is frustrating as well as expensive—so we've developed this guide to help you maneuver through the options.

The 10 Simple Steps are designed to identify the software features you need and want, and then quantify how well a particular software product satisfies those requirements. We hope you'll discover that Sage Timberline Office financial and operations software is right for your construction, estimating or property management needs. But if another software company can provide you with a better "fit", then we're glad that we've been able to help you make a successful decision.

# 1

## List Needs & Wants

Before you start looking at products, take a hard look at what your company really needs from a software package. Talk with managers about the kinds of information they consider essential. Ask data entry personnel about the pros and cons of the existing system. Your needs assessment should yield two groups of issues: capabilities that you absolutely must have (Fixed Items) and features that you want but would be willing to sacrifice (Negotiable Items). Make lists of your Fixed and Negotiable items. Later these lists will help you quantify and compare individual software products.

### Fixed Items

Some of these issues might be on your Fixed Items List, but don't view this as a complete inventory of the topics you should consider. Your company's list will likely include many items not shown here.

- Must work within business plan objectives (i.e. growth, customer base, e-commerce, 5-year strategic plan, markets).
- Must meet current information requirements of each department and offer opportunities for enhanced data use.
- Must meet needs of data entry personnel.
- Must offer easy audit trails.
- Must meet current and anticipated financial reporting needs.
- Must include a powerful report writer that offers easy customization.
- Must be compatible with your company's existing hardware.
- Must support ODBC. (Open Database Connectivity, or ODBC, enables applications to access multiple database management systems using Structured Query Language or SQL.)
- Must be capable of simultaneous use by several employees. (What will be the maximum demand on the system?)
- Must be designed for end users with a certain level of expertise. (What is the minimum skill-level required?)
- Must allow control of access to data; flexibility in access levels desirable.
- Must be a complete, integrated system.

### Negotiable Items

These are a few of the items that might appear on your Negotiables list. Your specific company list will probably be much longer.

- Should offer ability to expand and enhance system capabilities with add-on modules.
- Could require buying new hardware to run new software.
- Would like faster invoicing capability.
- Would like ongoing technical support.
- Would prefer personal software training to written manuals.
- Would like easier access to job-cost data.
- Would like to streamline employee duties; improve productivity.
- Would prefer a complete, integrated system.

# 2

## Identify the Contenders

Armed with your lists of needs and wants, you can start looking for corresponding software. At this point the objective is to focus only on the most important issues. Here are some guidelines:

- Begin by looking at the ads and articles in trade journals.
- Use the Internet to locate vendors' Web sites and online software reviews.
- Attend trade shows and visit exhibit booths of potential vendors with interesting software packages.
- Find out what firms win awards for software design and development.
- Contact local trade associations for software recommendations.

It shouldn't take long to come up with a list of a dozen companies that seem to match your lists of wants and needs.

# 3

## Review Reputations

Now it's time to concentrate on the companies that make the software; you'll deal with the products later. Approach this task as if you were hiring a key employee. Some factors to consider are:

- How long has the company been in business?
- What do stock analysts say about the company (if it is publicly held)?
- Does it have the size and staff to fulfill advertised promises of training, technical service, product support, product enhancements?
- Is the company known for providing quality products? Or is it known for "bugs" and system crashes?
- Can the company provide referrals, testimonials or case studies of previous customers?
- Does it design products to integrate with promising new technologies (e.g. mobile technology, Internet, ODBC, SQL)?
- Is the company an industry leader?

If possible, ask your competitors what software systems they are using (and if they'd buy the same software again). If you're concerned about any of the answers you find, eliminate the questionable companies from your list.

# 4

## Make First Contact

Call each of the software vendors on your “short list.” Ask each company to send you:

- Current brochures.
- Information on service and support programs.
- A schedule of training programs and user events.
- The most recent financial statement (if the company is stable it probably won’t disappear six months after you commit to their products).

Ask whether the company would be willing to send someone out to demonstrate the software for you. A demonstration is typically much faster and more informative than trying to struggle through trial software or demo disks on your own.

Because this is your first interaction with the software providers, you can expect to start receiving follow-up contacts from both the manufacturers and their representatives in the field. View these contacts with the following considerations in mind:

- Was the company responsive to your initial requests?
- Did it follow up after you received the information to answer any questions or offer further assistance?

# 5

## Review Service, Support & Training

Software doesn’t operate by itself. Employees must be trained to use it, and someone has to be responsible for providing support and service when you need it. Examine each vendor’s brochures for specific information about service options and training programs.

### **Does a company provide technical support?**

If so, for how long? And in what way? Look for a provider that offers a variety of support channels phone, fax on demand, Internet knowledgebase, online tech support, and so on.

### **Does the vendor offer several levels of service or support programs?**

Do you get to choose the level of support you want and need—regardless of the product or package you buy? Will you be able to change your mind later on, without paying a penalty?

### **Does the vendor provide a number of training methods?**

In-house training? Regional training centers? Ongoing training opportunities? Web based training? A forum for user groups?

### **Is the provider committed to getting the software implemented?**

Has the company talked about data conversion? What resources of staff and time is it willing to offer?

### **Are there any service, support or training commitments that make one provider stand out from the rest?**

# 6

## Take the Test Drive

Now it's time to put the software through its paces. If you haven't already arranged for a demonstration, contact the two or three manufacturers that seem most promising, and arrange for demonstrations at your office. You should expect to see:

- A system that is intuitively easy to use.
- User-friendly graphical user interface (GUI) programming.
- Modules and reports that you can easily tailor to your company's specific needs.

If the vendor does not volunteer this information, be sure to inquire about:

- Data conversion and installation methodologies (see section 7 for specific questions).
- Its track record for getting systems up and running on time.

If you have any doubts about the capabilities of the reseller or installer, ask for three to five local references.

# 7

## Ask About Implementation & Integration

When a provider's field representatives contact you, ask some hard questions about how they would marry their products with your company.

1. How long it will take to implement the new software, and who will be responsible for installation?
2. How will the implementation affect your ability to service your own customers?
3. How much down-time will there be?
4. What changes (good and bad) will your customers notice?
5. What internal procedures will need changing, and who will be affected?
6. What are the plans for data conversion from the old system to the new?

Get a specific proposal on exactly what data would be moved, and who would be responsible for the coherency of converted data.

# 8

## Talk to References

So far, most of your information has come from the software companies themselves. But what do their customers say? Call the references supplied by vendors. Ask each contact the same questions, including these:

- How long have you been using X-Brand software?
- Why did you choose X-Brand over the others?
- Who performed the installation?
- Did X-Brand do a good job and finish installing the system on schedule?
- Have you been satisfied with the software?
- What problems have you had with the X-Brand products?
- Does X-Brand interface well with your other programs?
- Do your employees like working with X-Brand?
- Have you been happy with X-Brand technical support and training?
- Do you feel that your company received good value for the money you spent?

If a vendor receives three positive references, keep that provider on your short list. If you get negative feedback, try to determine whether the core problem lies with the software, support, training, implementation or other issues. If you're not satisfied with the results of your calls, ask the vendor to provide you with more references.

# 9

## Consider All Costs

Be careful about making snap judgments based solely on the cost of the software. You may also need to invest in new hardware, buy additional software from third parties, or pay for software maintenance plans, data conversion costs, and staff training expenses. Remember that the price of software is only one aspect of the cost for the entire implementation process. One last word on cost: avoid "over-buying" just because a feature looks interesting. Don't confuse what you want with what you need.

# 10

## Quantify the Facts

By now you should have narrowed the field to just two or three vendors. It's time to compare your original "wants and needs" with the capabilities offered by each software package.

To evaluate products quantitatively, prepare a simple spreadsheet (example shown below).

- A. **Criteria** are the issues you identified as "wants and needs." Your spreadsheet may include only a few criteria or dozens.
- B. **Weight** is the relative importance that you assign to each of the criteria (0 = no importance; 3 = most important).
- C. **Rating** is the ability of a software package to satisfy specific criteria (0 = fails; 3 = meets ; 5 = excels).
- D. Multiply weight by rating to achieve a **value** for each of the criteria.
- E. Add the values to arrive at **total points**.

### Example of Weighted Spreadsheet

Criteria	Weight	Software "X"		Software "Y"	
		x Rating	= Value	x Rating	= Value
Handles growth	2	2	4	1	2
Easy data entry	2	1	2	4	8
Audit trails	1	3	3	1	1
Report writer	3	5	15	2	6
Supports ODBC	1	1	1	4	4
Intuitive interface	2	3	6	2	4
Add-on modules	2	1	2	4	8
No new hardware	2	5	10	1	2
Technical support	1	2	2	0	0
Personalized training	2	3	6	4	8
Easy install	3	1	3	2	6
Internet/email	3	1	3	3	9
References	2	4	8	2	4
		<b>Total</b>	<b>65</b>	<b>Total</b>	<b>62</b>

The results of the spreadsheet are not carved in stone. There is no right or wrong answer. The figures merely help you to quantify factors that will help you to make a decision. The final decision, however, must still be made by you.

If you'd prefer not to develop your own spreadsheet, you can use the blank master form provided on the last page of this document.

# The Decision

A software package that “fits” your business can improve cash flow, increase employee productivity, provide accurate data to support better decisions, and grow with your business. Your company’s software selection process may take months to complete. Or you may find your ideal software long before completing all 10 steps described above. Only you can decide how much effort to expend in the search for the best software package to meet your current and future needs.

Whether you choose Sage Timberline Office or another software package, we hope that the outcome of your search exceeds all expectations.

## **About Sage Timberline Office**

The people behind Sage Timberline Office products and services are inspired by creating integrated solutions that are able to flex, adapt, and evolve to help businesses expand and grow. Serving construction and real estate professionals, the software is used by more than 20,000 customers worldwide, helping them streamline and accelerate every phase of the facility lifecycle — from a building’s earliest conception through occupancy and deciding when or if to sell.

In 2000, we received the prestigious STAR Award for Most Improved Software Support Organization, awarded by the Software Support Professional Association in recognition of our two-year effort to re-engineer our client services program. In 2004, we received our fourth consecutive Support Center Practices certification for excellence. In addition, the Sage Timberline Office customer support center was one of nine winners selected internationally by the 2004 Global Call Center of the Year. The award recognized overall commitment to improving customer service and providing consistent performance in the delivery of technical support services.

## **About Sage Software**

Sage Software offers leading business management software and services that support the needs, challenges, and dreams of more than 2.4 million business customers in North America. Its parent company, The Sage Group plc (London: SGE.L), supports 4.5 million customers worldwide. For more than 25 years, Sage Software has delivered easy-to-use, scalable, and customizable software for accounting, customer relationship management, human resources, time tracking, and the specialized needs of accounting practices and the construction, distribution, manufacturing, nonprofit, and real estate industries. For more information, please visit te Web site at [www.sagesoftware.com/moreinfo](http://www.sagesoftware.com/moreinfo).

