ABSTRAKT

Software Buyer's Guide

A Practical Framework for Evaluating and Selecting the Right Software Partner

1. CATALYST EVENT
2. WHY NOW
3. DEFINE THE DETAILS
4. SOLUTIONS EXPLORATION
5. PLAN THE ROLLOUT
6. CHECKLIST TO USE TODAY

1 CATALYST EVENT

Purpose:
Identify the specific event or realization that made you aware that the current system/process isn't sustainable. Without a clear catalyst, it's difficult to create urgency or leadership buy-in.

Action Items:

- [ ] Reflect on what specifically triggered the need for change. Was it:
    - *A failed audit or compliance gap?*
    - *A client escalation or lost business?*
    - *Productivity or reporting issues?*
    - *Growth or scaling limitations?*
    - *Remote employees?*

Anticipated Challenges:

- Teams may remember the event differently or minimize its impact.
- Leadership might not feel the same urgency yet.
- Without data or examples, it can sound like a one-off complaint rather than a systemic problem.

Outcomes of Stage 1:
You can clearly explain what happened. There's agreement that something needs to change, creating the foundation for forward momentum.

2 WHY NOW

Purpose:
Connect the catalyst event to today's reality. Identify how the problem has intensified and what risks or costs make the change more urgent. There is an opportunity cost of waiting.

Action Items:

- [ ] Document this event in plain terms: what happened, when, and how it currently affects the business today.
- [ ] Summarize why "doing nothing" is no longer an option.
- [ ] Begin identifying the potential business impacts.
    - These will be defined in Stage 3, but it's important to start thinking about them:
        - Compliance or audit exposure
        - Inefficient workflows or manual processes
        - Missed revenue or limited scalability
        - Data silos or integration barriers
        - Legislative changes
- [ ] Use industry benchmarks to gauge where your business stands.

Anticipated Challenges:

- Teams may struggle to quantify the impact of inefficiencies.
- Competing priorities can make it hard to maintain focus.
- Some may resist framing the situation as urgent without visible pressure.

Outcomes of Stage 2:
Everyone agrees *why* this initiative matters now and how delaying action increases business risk.

3 DEFINE THE DETAILS

Purpose:
Establish the details that will guide the project. The exact problems to solve, the people involved, the expected investment, and the ownership structure. Without this step, projects are often delayed or die.

Action Items:

- ☐ Define the core problem statements and business impacts.
- ☐ Identify key pain points across departments (Ops, Sales, Support, IT, Compliance, Finance, Security).
- ☐ Establish a preliminary budget range and funding source.
- ☐ Assign project ownership and define roles/responsibilities.
- ☐ Clarify what “success” looks like for leadership vs. daily users.
    - Determine whether this initiative is expected to generate revenue or reduce costs.

Anticipated Challenges:

- Budget discussions can stall if value isn’t yet quantified.
- Unclear ownership leads to delays or scope creep.
- Conflicting priorities between teams/departments may emerge.
- Overly detailed requirements can paralyze progress before exploration begins.

Outcomes from Stage 3:
You have a documented understanding of what the project is solving for, who’s involved, and what resources are available. The effort now has structure, ownership, and direction.

4 SOLUTIONS EXPLORATION

Skipping earlier steps can stall vendor discussions or cause misalignment on expectations. Stages 1-3 are very important.

Purpose:
Investigate potential solutions, engage vendors, and assess how each option aligns with your operational, compliance, and technical needs.

Action Items:

- ☐ Finalize project scope and confirm internal stakeholders.
- ☐ Develop an evaluation framework to keep comparisons objective.
- ☐ Create a vendor shortlist based on requirements and references.
- ☐ Requirements should be shared with the vendor upfront.
- ☐ Multiple focused demos will be needed for each vendor.
    - Examples:
        - Operations demo: daily workflow and agent usability.
        - Compliance/IT demo: Reg F, PCI, SOC 2 alignment, data handling, access control, integration readiness, etc.
        - Executive/ROI demo: reporting, analytics, and cost model.
- ☐ Gather feedback from all leaders/teams and consolidate scores or notes.
- ☐ Timeline and budgets need to be confirmed internally.

Risks:

- Demos should show the product in action; PowerPoint/videos need additional validation.
- Stakeholders can lose engagement if sessions feel repetitive.
- Security and compliance reviews can delay decision-making.
- Overemphasis on “cool features” instead of business outcomes.
- Overlooking total cost (integration, data migration, support).

Outcomes from Stage 4:
You’ve evaluated solutions objectively, validated compliance and technical fit, and identified a preferred vendor supported by leadership and business case evidence.

5 PLAN THE ROLLOUT

Purpose:
Translate the selection decision into a structured rollout plan that sets clear expectations, defines responsibilities, and ensures user adoption.

Action Items:

- ☐ Finalize MSA, BAA, DPA, and order form.
- ☐ Define the implementation roadmap (milestones, owners, and timelines).
- ☐ Establish a clear testing and go live process.
- ☐ Create a training and change management plan for staff adoption.
- ☐ Align internal and vendor teams on communication cadence and support expectations.
- ☐ Identify early success indicators to measure post-launch performance.

Risks:

- Legal or procurement bottlenecks delaying the timeline.
- Missing clarity on who owns implementation tasks.
- Underestimating user training and change-management needs.
- Changes in third-party client requirements or external circumstances may delay new vendor approvals.

Outcomes from Stage 5
Contracts are complete, and the implementation plan is approved/begins.

6 CHECKLIST

- ☐ Reflect on what specifically triggered the need for change.
- ☐ Document this event in plain terms: what happened, when, and how it currently affects the business today.
- ☐ Summarize why “doing nothing” is no longer an option
- ☐ Begin identifying the potential business impacts.
- ☐ Use industry benchmarks to gauge where your business stands.
- ☐ Define the core problem statements and business impacts.
- ☐ Identify key pain points across departments
- ☐ Establish a preliminary budget range and funding source.
- ☐ Assign project ownership and define roles/responsibilities.
- ☐ Clarify what “success” looks like for leadership vs. daily users.
- ☐ Finalize project scope and confirm internal stakeholders.
- ☐ Develop an evaluation framework to keep comparisons objective.
- ☐ Create a vendor shortlist based on requirements and references.
- ☐ Requirements should be shared with the vendor upfront.
- ☐ Multiple focused demos will be needed for each vendor.
- ☐ Gather feedback from all leaders/teams and consolidate scores or notes.
- ☐ Timeline and budgets need to be confirmed internally.
- ☐ Finalize MSA, BAA, DPA, and order form
- ☐ Define the implementation roadmap (milestones, owners, and timelines).
- ☐ Establish a clear testing and go live process
- ☐ Create a training and change management plan for staff adoption.
- ☐ Align internal and vendor teams on communication cadence and expectations.
- ☐ Identify early success indicators to measure post-launch performance.