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SHOPPING LIST CHECKLIST

To help create your shopping list, and decide which software you need, it's worth asking yourself the questions below. They cover everything from features, functionality and integration, to how it will affect your business, your customers and your team.

YOUR BUDGET AND THE SOFTWARE FEATURES YOU WANT	Starting with what you want the software to fix and the features it must have, this section also looks at what budget you've set aside for it – and the plans you've made for longer-term and ongoing costs.
What type of software do you need? *If you're unsure, take a look at our guidance on finding the right software for you before completing this checklist.*	
Which process or way of working do you want to improve? *This could be one process, such as digitising your tax, or multiple processes to reduce time spent on admin.*	
What are the must-have features for this software? *These are the features that the software must include for you to consider investing in it. They'll link back to the problem(s) you're trying to solve.*	
Are there any features you'd like the software to have, but aren't essential? *These are lower priority, but good to have in mind for when you talk to suppliers.*	
How much can you afford to spend on the software? *This is the sum you've set aside to cover all the costs of adopting the new software and implementing it into your business.*	

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YOUR BUDGET AND THE SOFTWARE FEATURES YOU WANT *(continued)*	Starting with what you want the software to fix and the features it must have, this section covers what budget you've set aside for it – and the plans you've made for longer-term and ongoing costs.
How much have you budgeted for ongoing costs? *This could be used for subscriptions, for example, or support offered by the supplier.*	
Have you allowed a buffer for longer-term costs? *If so, how much? And what have you allocated this for? For example, if your business is growing, how might this affect how you use the software in the future? Are you likely to need to upgrade it?*	
YOUR TEAM AND CUSTOMERS	This section focuses on the impact of new software on your team, customers and business, and considers training you'll need to provide so that everyone is able to fully adopt the new tech.
How many people in your team is the new software likely to affect? *Think about whether the new software will affect every aspect of the business or just certain roles.*	
To what extent will the new software affect your team's ways of working? *This will help you understand the likely impact of a digital roll-out. A team already familiar with software is likely to need less support than one adopting a completely new way of working.*	
How many members of your team will need training? Can you do this in-house? *If the answer to in-house training is no, then include how much budget you can allocate for this.*	
Do your customers or suppliers have any needs the software could help fulfil? *Include any challenges or issues you've found in your working practices with customers and suppliers. For example, you might be looking at how staff can communicate with each other better, and find there's a way to improve their communications with customers too.*	

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YOUR TEAM AND CUSTOMERS *(continued)*	This section focuses on the impact of new software on your team, customers and business, and considers training you'll need to provide so that everyone is able to fully adopt the new tech.
How will you get feedback from your team on what they would like from the new software? *It's important to get your team involved as early as possible and to consider their feedback when making your choice.* *How will you gather feedback? Who in your team will organise this?*	
How might the new software change your customers' experience? *Think about the positives and negatives, including the impact of a transition period on their experience.*	
ABOUT THE SOFTWARE	This section invites you to think about how the software needs to work. How many licences will you need? Are there specific requirements you need to consider that are related to your business or industry? Will the new software need to be compatible with other technology you're using?
How many licences will you need? *Some software is charged per licence, so consider how many people are going to need access immediately and over the first 12 months after roll-out.*	
Where does the software need to work? *For example, will it be used in just one location? Or by teams of people in various sites across the country?*	
Does the software need to support multiple languages, currencies and/ or regulatory environments? *Are you likely to need any of these features in the medium or long term?*	
Are there any special requirements your software will need to cater for? *This could be accessibility requirements, such as supporting voice integration for hands-free use.*	
Are you replacing old software? *If so, what did you dislike about the old software? Do you need to transfer data from the old system to the new one?*	

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ABOUT THE SOFTWARE *(continued)*	This section invites you to think about how the software needs to work. How many licences will you need? Are there specific requirements you need to consider that are related to your business or industry? Will the new software need to be compatible with other technology you're using?
Are you looking at Cloud-based software (i.e. not stored on your local Server)? If so, do you have a good internet connection? *A good internet connection would mean you could stream videos/music online, for example, without waiting for them to load.*	
Which type of operating system do you already have in place? *For example, Windows, Android or Apple?*	
Does the new software need to be compatible with other systems you're running? *If so, which other software?* *Are you likely to buy more extras and add-ons over time, which will also need to be compatible?*	
Is there a unique feature to your business that could mean standard software wouldn't work for you? *This could be a regulatory requirement, or because you use a specialist system for another area of your business that the new software would need to link to.*	
Is there an industry-standard software that's used for your business type? *It's worth spending some time researching what other businesses in your sector use.*	
Are you planning to buy standard, customised or bespoke software? *Standard software is usually cheaper, but you may have to change some of your processes to accommodate it. Generally, the more software is tailored to your unique needs, the more it costs.*	

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SECURITY	These questions reflect on your existing level of cyber security and whether you need extra measures for protecting your business and customer data when implementing new software.
Do you already have cyber security in place for your current digital processes? *This could include processes and systems in place to protect emails, data and your business' devices, including phones and computers.*	
Are you looking to improve your cyber-security protection with this software? *Do you want to boost your security, to avoid cyber-attacks such as phishing and malware?*	
Do you or your clients need advanced cyber security, or for data to be handled in a certain way? *For example, do you work in the care or security sector and need to store and protect data for vulnerable individuals? If so, write down the extra levels of security you would need.*	
SUPPORT AND ROLL-OUT	This section looks at the level of help you'll need when implementing your new software. This covers the support you'll need from your supplier and any extra costs you may need to factor into your budget to get this support.
Will you need help installing and implementing this software? *Think about the level of technical support you'll need, who can provide this, and how much you can pay for this service.*	
Do you have in-house help? *Do you have people in your team who can help maintain the software and support the rest of the team who'll use be using it?*	
Do you need the supplier to provide help and support for this software? *This could be an ongoing IT support desk or extra help with installation.*	

Once you've created your shopping list, it's time to work out how much you want to spend.

Find out more in step 3 of our 6-part series of guides Calculate your software budget.

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