The *Step-by-Step Checklist* for Buying Business Software

Has your business outgrown handshake agreements, paper invoices and endless email threads? If so, it's time to modernize and add a business software platform to your day-to-day operations. But before you go buy the first tech tool that crosses your path, use this checklist to fine tune your needs and choose the best software features to benefit your business.

☐ Goals

Define what you're trying to accomplish within your business. For instance, if you need more market penetration, perhaps a tool with automated marketing or social media scheduling is key for you. If you need to reduce no-shows, then an online appointment schedule tool with automated reminder notifications should be at the top of your list.

☐ Budget

Do some research on what typical tech systems cost, then target that range. Most are monthly subscriptions. Decide which features are must-haves and which are nice-to-haves. Be wary of bargain pricing. The best platforms are those that offer free tech support and continue to add new features and functionality. Tech businesses that offer one lifetime cost are not going to be around to provide you support or new capabilities.

☐ Consolidation

Do you need multiple tools to do very specific tasks, or an all-in-one solution? Be careful of buying into tools that are meant for larger organizations. There is such a thing as too much technology.

☐ Scale

Can a tool lead you into growth? Or will you have to pull it along to meet your needs — or worse, pay for additional tools for other needs? Ask how effective each system is at interim levels. Try to discern if they'll be one step behind or one step ahead of you.

☐ Support

How much tech support do you think you'll need? Are you a tech native or is that outside your strengths? Characterize the urgency of when you need tech support, then find vendors with offerings to match. Be wary of those that charge extra for technical support via phone calls.

☐ Integrations

Every industry has their own stable of industry-specific tools (e.g., practice management software). Whether you're looking to buy inside or outside that sphere, learn what tools work together to create a seamless experience.

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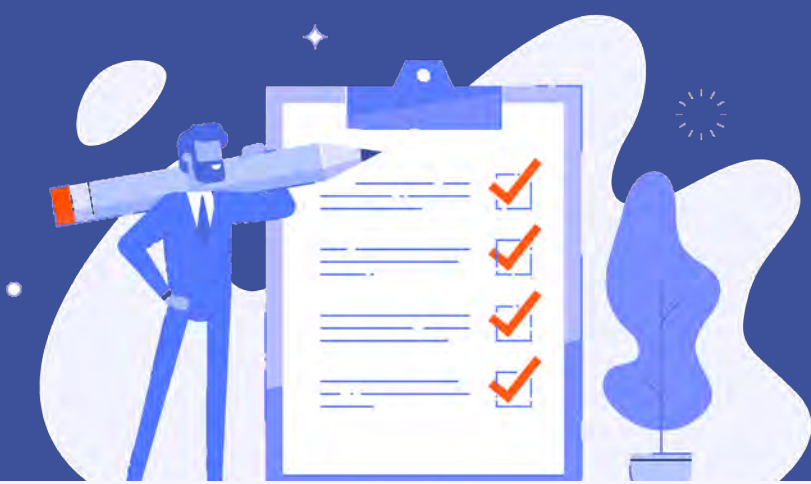
Thryv's all-in-one business management software is designed specifically for small businesses. Learn why more than 50,000 small businesses run better using Thryv. Learn more at Thryv.com.

☐ Security

This is nonnegotiable. You are dealing in personal information. Any system you choose must ensure no data can escape. What kind of security measures does each tool provide? How ready are they for disaster? How safe is your data as well as your customers'?

☐ Compliance

If your industry has regulatory restrictions, can the systems you're considering meet those requirements? Will they follow your industry to implement new requirements so you're always compliant? Ask these questions before you buy.

☐ Customer Journey Capabilities

To effectively understand how well your business is doing, you need to understand the journey your clients take. Are you able to see their progression from their days as a prospect to customer to advocate? Ask if you're able to clearly see a 360-degree view of each client at every stage.

☐ Customer Communication

How easy is it to maintain clear lines of communication with your clients when they use multiple tools? For instance, do messages from various platforms, such as social media, Google, text and webchat, flow into a centralized inbox?

☐ Mobile Friendly

Are you able to take these systems on the road? Do they have accompanying apps that work seamlessly?

☐ Reviews

Consider the positive and negative of any tool. How does each relate to your goals and mandatory needs? Seek out other users personally to see if they'll share their experiences.

Buying software can be overwhelming. If you have a hard time choosing between two finalists, consider testing each tool in a live setting. Some platforms offer free trials, others have an entry-level (yet limited) product at a low price point.

Once you make a selection and get started, take advantage of as much onboarding support as possible. Give the tool a solid test run of at least a few months in real-life scenarios to determine if it's the right long-term investment for you and your business.

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