


The SMB guide to evaluating new software

Evaluating new software tools this year? Use this worksheet to assess and select the ideal software for your business. During your research, add your notes to the sheet to easily compare options and find the right fit.




Name of software: _____

Ease-of-use 


Any new software should be easy for the typical user to learn and begin using. Ease-of-use generally means it's easy to understand the tool's features, the tool is simple to navigate, and it doesn't require technical or specialized skills. It's important to determine in advance whether the software is accessible to your team and won't require a lot of time and training to implement.

Notes

Essential features 


It's important to compare the tool's features to a list of capabilities your team is looking for. In addition to evaluating whether the software offers all essential features, it also helps to consider whether it comes with a lot of features you don't need. Too many unnecessary features may increase cost and complicate the tool's use.

Notes

Easy integrations 

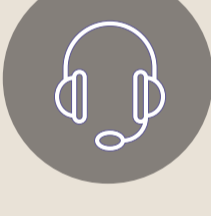
Software that integrates with the tools you use most will make it easier to implement and include in analytics. Any applications tied to customer data can be especially important to connect. Those integrations help give you the full view of your customers' journeys.

Notes

Pricing plans 


Software pricing may be available in annual or monthly subscriptions to simplify budgeting. Consider whether you can choose the features or levels you need so that you're only paying for what you will use.

Notes

Level of Support 


Software solutions may offer one support option or a variety of tiers. It's important to see what support methods are offered by a solution, as well as anticipated response times.

Notes

Security and Compliance 


It's essential that a software solution has its own security and compliance safeguards in place. Its policies and vulnerabilities can directly impact your business and customers.

Notes

Getting Started 

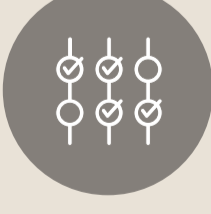
Getting off on the right foot with your new software can help set your team up for long-term success. It also wastes time and resources to invest in a tool that requires lengthy setup and training.

Notes

Reputation and Reliability 


Reviews and testimonials from real users can give you a good idea of what to expect from your software investment. You can also look at their community forum to see how responsive they are to current customers.

Notes

Customization Options 

A software solution's customizable options may allow you to brand or tailor various features like integrations and dashboards. Determine which customization options are important to your business before committing to a software solution.

Notes

Scalability and Flexibility 

It's important that software tools give your business room to grow. The right software can also help you be more agile and adaptable within your business.

Notes