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# An Insider's Guide to SELECTING BUSINESS SOFTWARE

By Paul Kirsch

**As a 30-year veteran of the technology industry, I** often found myself taking for granted the incredible pressure placed upon “non-technical” individuals that had the audacity to launch a company, armed with only a business degree.

*What were they thinking? How did they possibly hope to make the technological decisions they needed to make without an engineering degree from MIT in their other pocket?*

An exaggeration? Possibly. The fact remains that at one point or another every business operator is going to be faced with some very important—and very expensive—technological decisions that will ultimately have a profound effect on the operation of their business. Just to be competitive in a modern business climate, businesses will eventually have to select “line-of-business” software to assist with daily operations and some form of ERP/ accounting software to keep track of all the money they’re making in the process.

While the specific reasons one may find to choose one software package over another are as diverse and abundant as choices available, there are a number of fundamental caveats that every would-be software purchaser needs to keep in mind. In nearly every professional field one will encounter, they will also find those who have made their careers in said field will have a specific perspective on the issues that matter the most. The prototypical “industry insiders” will always know the right

questions to ask; it's the reason we ask our mechanic friends to "check out" the used car we're thinking of buying, or why we ask the doctor we meet at the golf course for a second opinion on the problem that our "friend" is currently suffering from.

As mentioned previously, I've made my living in the software industry for a very long time. I've designed systems and helped people select them. I've seen a lot of really great ideas and a lot of dismal failures. Through it all, and with the help of some colleagues, I've assembled my top list of "must-have" considerations for any software purchase.

By following some simple, but very sage advice, one can side-step most of the potential sources of software tragedy. With that in mind, I humbly offer my *"Insider's Guide to Software Selection."* As for the website and the social media, you'd best find yourself a web-obsessed twenty-something with a Red Bull habit and hope for the best.

### **It's Your Data—Maintain Control Over It**

In recent years, the emergence of "cloud computing" has made accessing our critical data easier and more convenient than anyone could have ever imagined. Like many information workers, I have a computer at my office desk and another in my home. For those times when I'm at neither location, I have a laptop that allows me to work wherever I may find myself. Supplementing these "traditional" PCs is my arsenal of mobile devices: a smartphone, a couple of tablets, and so on and so on. The amazing thing is that my essential data—contacts, calendar, email, documents, photos, etc.—is conveniently waiting for me on whichever device I happen to pick up or sit in front of.

The entire experience has become so seamless, it's almost magical! It's easy to picture a "cloud"—bursting full of my precious data—following me around in all its ubiquitous fluffiness, like an obedient puppy. Fortunately, I know better. I'm in the software

business. I know there's no fluffy cloud carrying my data in the sky above; my email and contacts are safely stored in a pair or mirrored hardware drives installed on a file server located in my office's server room. If I close my eyes I can even picture it—first rack from the right, four servers up from the bottom—there it all is.

The question one needs to ask is, "Do you know where your data is?" When someone tells you that your precious, irreplaceable company data is being safely kept "in the cloud," substitute the word "cloud" for "someone else's computer" in your mind. That will give you an accurate picture of the situation as it is.

A "cloud" provider (otherwise referred to as a "public cloud"), is nothing more than an outside party that is leasing you space on their servers to warehouse your data. While this may be all well and good, you need to recognize that you are not in control of your data. Quite frankly, you probably don't have the faintest idea where your data even is. The only thing you can be sure of is that it is being kept in some server—or servers—somewhere... anywhere!

The moment that comforting image of the magical cloud goes "poof" in your imagination, any number of obvious questions should come to mind, such as, "Who's in control of my data?" and "Who has access to it on a regular basis?" You can be quite certain that wherever these servers containing the fruits of your labor are located, there are also employees who are responsible for maintaining them. Possibly all, but certainly some of these "employees" can access your data as easily as you can access the data on your hard drives.

Optimistically, I choose to believe that most cloud providers do their very best to keep your data safe and secure; but then reality steps in. Is it so unreasonable to suggest that at least one of those "employees" is a recent university graduate with an unbelievable load of student debt, or perhaps just someone who has picked up an

unfortunate and expensive habit on the side? People are people, and many of them are easy to motivate—especially if you have competitors willing to pay for access to your confidential data.

The reality of the situation is you can simply never be certain. We've all read of supposedly secure data stores being hacked, and often some very personal data or photos finds their way on the public internet. No one can ever be certain about how it got there, but isn't that the lesson to be taken from all of it? The moment any asset—including your financial data and confidential bids—is placed in the trust of another party; you can never truly be secure.

The good news is that there is an alternative. So-called "private clouds" have taken the corporate IT world by storm (pardon the pun). "Private" clouds work exactly like their "public" counterparts, except the data is stored on *your* servers, under *your* lock and key. No matter what, you have the final word on what happens to *your* data. No one can withhold access, even if they become insolvent or you decide not to pay your maintenance fees. "Private" clouds are a simple solution that provide much-needed peace of mind.

### **It's Your Data, Part 2—Make Certain It's Accessible**

Having established where your data makes its home, you probably feel as though your potential problems are behind you. No such luck. Many software applications, especially those built on an older "legacy" code base, store their data in proprietary formats and provide no tools with which to access it. This is particularly true with packages that have a heritage stretching back to the days of DOS-based networks; long before any data access standards even existed.

The net effect couldn't be more frustrating. While may you be secure in the knowledge that your data resides on your secure hardware, and is beyond the reach of outsiders, it can also be just as unreachable by you. If the

data is written in a format that can only be read by a single software package, you could find yourself facing with the digital equivalent of “locked-in” syndrome. You know the information is in there somewhere; you just can’t get to it.

There are several ways one can lose the ability to use a software product. The vendor or developer could fall off the face of the earth, or you may find yourself cut off should you stop paying your maintenance fees. In any event, the net result is the same—your data is locked in a box that you simply don’t have the key to.

Even if this never occurs, and you continue to have access to said software for the foreseeable future, you’ll still be faced with limitations and the frustrations that accompany them. “Business Intelligence” (BI) is another technological trend that is gaining popularity with each passing day. New applications that allow business operators to use their existing repositories of data are being constantly released. Businesses are finding countless new ways to leverage those valuable data assets and use them in ways they never imagined before.

Even if you’ve never considered such a thing, you can be fairly certain that at some point someone in your company will want to use your data for something that your existing business software can’t accommodate. By keeping your data accessible, in some industry standard format, you keep your options open. You can purchase off-the-shelf applications, or retain the services of other developers to create the bespoke tools you may find yourself in need of.

It all comes down to this simple point: don’t underestimate the importance of “future proofing” your business. Make certain that any software you implement provides a mechanism for accessing your business data, especially if you and the vendor part ways down the road.

### ✔ **Know the People You’re Dealing with—All of Them!**

When contemplating the purchase of any piece of business software, there is one major consideration that nearly all inexperienced shoppers can often overlook. When software developers present their products, these potential buyers always begin with the same assumption—that the “developer” actually developed everything they’re showing you. An understandable assumption, but in reality, nothing could be further from the truth.

Apple Computer’s co-founder Steve Jobs made famous the statement: “*Good artists copy; great artists steal.*” Ironically, Jobs even stole the quotation itself, which has been attributed to everyone from Pablo Picasso and Igor Stravinsky to T.S. Eliott. The point is the quote captured the attention and the imaginations of the masses; and like all good clichés, it contains a good deal of truth.

“*Intellectual property*” is a term that most people have encountered at one time or another, and the majority of

them doubtlessly understand that it refers to the specific elements of innovation that differentiate one particular product from others in its field. For software developers, it refers to the fountain from which the money flows. These often patentable components are lucrative licensing opportunities for the geniuses that created them—but potential problems for the unsuspecting software buyer.

Software developers, especially smaller ones, routinely source software components and technologies from other companies and developers. Sometimes these components are properly licensed, and sometimes they’re not. Unsuspecting software buyers could find themselves in a very crowded room. Any issues that could potentially arise from improper or expiring license arrangements could seriously impact a vendor’s ability to continue supporting a product. Did any other person or company contribute elements of the software you’re about to purchase? Who’s responsible for the ongoing maintenance and development? What happens if they terminate their arrangement or the other party goes out of business?

As a mere purchaser, it’s unlikely that you’ll be held responsible for any such mishaps, but as someone who has invested in the product at the center of the dispute, you are most certainly going to be affected by it. The last thing anyone needs to hear in a moment of technological crisis is that the problems you’re experiencing are “someone else’s fault,” and your friendly software vendor can’t do anything but sit helplessly alongside side as you both wait for some unknown third party to save the day.

Each and every outside party that a software developer relies upon is one more person or company that you are now also relying on, for as long as you use the product. You are ultimately subject to the terms and conditions they’ve negotiated among themselves, long before you ever entered the picture. Your brand new and very expensive business system could easily be at the mercy of a one-man development team working out of their parents’ basement.

The bottom line is simply this: Find out exactly who has contributed to, and is responsible for, the ongoing maintenance of every aspect of the software that you’re considering. Make sure you understand everyone’s responsibilities and obligations, and what recourse you may have if one of them leaves the party early. The one thing you can be certain about is you’ll inevitably find yourself dealing with each and every one of them at some point.

### ✔ **It’s All About Support**

Obviously no one needs the advice of an “insider” to convince them of the importance of good technical support. What they may need, however, is some insight into what kinds of questions to ask and help to anticipate needs they may have never considered. Making the operation of your business dependant on a software package is a lot like walking a tightrope. The situation is precarious

and potentially dangerous; you need to know that there's a safety net ready to catch you if the worst should happen.

I'm reminded of an old salesman's joke about a man who dies and is given of choice of whether to spend eternity in heaven or hell. Before he decides, he's given a brief tour of each. Heaven looked just as he expected—angels playing harps floating about on clouds and the like. Hell, however, looked like a cross between Las Vegas casino and strip club: drinking, gambling and every imaginable form of debauchery. It took only a moment for the surprised man to make his choice—compared to endless days of harp concertos, the scene downstairs looked like a far more interesting way to spend eternity.

Decision made, off to the basement he went. When he got there, however, there was nothing but fire and brimstone as far as the eye could see. *"I don't understand,"* he protested, *"what happened to the party? Everything looked amazing when you showed it to me before!"* The attendant looked at him with wide eyes, and replied calmly, *"Then you were a prospect. Now you're a client."*

There's nothing easier for a vendor to do than extol the virtues of the support they're going to provide. The problem is in knowing what the reality is going to look like when money has exchanged hands and your business is now at their tender mercies.

Obtaining references from other clients is an obvious first step. Bear in mind, however, you can't rely entirely on what others have to say. There's a strange phenomenon I've observed over my many years in this industry that I can only attribute to a form of "Stockholm Syndrome" as experienced by hostages that end up feeling sympathy and even affection for their captors. A vendor's clients may be understandably reluctant to give them a poor review; for fear that they'll be penalized with even worse service in the future. Besides, there is the simple truth—misery loves company.

The best one can do is try to get an accurate assessment of your vendor's resources and as such form a realistic image of what you can probably expect. Despite what they may promise, and even their best possible efforts, a one-man support team simply won't be able to be there for their clients at all times. Everyone gets sick, goes on vacation and can simply answer only so many inquiries in a day. The likelihood of receiving a timely response to a support inquiry improves with the size of the support team that is available to you.

Above all else, as a business operator, you need to decide on exactly what your expectations are regarding support. If a technical issue arises or if you simply have a question about how something is done, how long are you prepared to wait for a response? Many so called "support" teams can take days to respond to an inquiry, and even longer if something needs to be corrected. It makes no sense to settle for a support system that is bound to leave you frustrated or even result in the loss of potential revenue.

That being said, a vendor's ability to respond to inquiries and help requests is only a portion of the support picture. Invariably there are going to be other things you're going to require from the developer of your primary business software. Are they continuing to develop the product? Are they embracing new technologies as they emerge? Do they have the resources to keep up with the evolving needs of your business?

As the needs of your business and your industry evolve, your software needs to keep in step with the changes happening around you. As your business grows, you may need to scale up to more comprehensive accounting platform; does the software you're considering allow for that possibility?

There may well come a day when you find you need to integrate your business software with another application. Does your vendor have any experience with development projects like this? Do they have the resources in house to complete them?

### Putting it All Together

Selecting a piece of software that is going to become the centerpiece of your daily operations is a massive responsibility and not a task to be taken lightly. The items covered in this article are just a few universally applicable items that should be addressed as part of the evaluation process. Beyond these, one still needs to compose a clear list of their business requirements and make certain the software in questions can address them to your satisfaction.

This is not a time for compromise. Decisions should never be based solely on financial considerations; it's far too easy to settle for the most economical choice. Selecting business software is a lot like choosing a plastic surgeon; they are both times you don't want to be hunting for a bargain!

Above all, don't be afraid to ask questions—lots of questions—about anything and everything that you may be uncertain or unclear about. With enough questions, you should eventually be able to form a good impression of what you can come to expect from the vendor and the software you're considering. ■

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