

What's your objective for the new software? This could be increasing sales, fixing a bottleneck, increasing staff retention, managing risk or ensuring compliance.

What's the exact goal? Give yourself a specific measurable target to aim for. If you want new software to help grow sales for example, how much do you want to grow them by?

When do you want it to happen? Give yourself an ambitious deadline for achieving your objective.

## 1. What do you want to see happen in your business?



### Example

- We need to get invoices out there faster to speed up cashflow
- We need to spend less time on HR admin now we've got more people
- We need a better way to share and store project documents
- We need to co-ordinate the way we communicate with clients

How does this objective for new software fit with your other objectives?

Have you tried to introduce this kind of software before? If so, how did it go, why did it fail?

Why is this a particular priority, and why is it a priority right now?

What do you need to keep in mind? for example, has high staff turnover been a problem for a long time or is it a new thing? If so, why?

## 2. What's the broader history and context?

What will 'good' look or feel like for you and your team?

How do you want to introduce new software? What do you want the process to be like?

How should the people in the rest of the business experience the process?

Is there anything you want to avoid as you implement new software?

What would make you look back at the project as having gone well?

## 3. How will you know the new software has succeeded?

Which bits of the business are you prepared to change?

Is there anything you don't want to touch?

What constraints are there? What wouldn't you do?

For example, is there a budget limit?

#### 4. What's in scope, and what are your limits?

Who will do the work involved in introducing new software?

Who might be affected by any changes?

Whose help will you need?

Who do you need to make sure is on side if the software is to succeed?

#### 5. Who's involved, and who might be impacted?

What else needs to be taken into account to ensure a good result? For example, are there other changes being made which need to be considered? Will the new software have to integrate with existing systems?

Does making this change rely on anything else happening?

#### 6. What dependencies are there?

You're in Step 1 of the SME Guide to Choosing Software. For more templates and guidance please go to [bethebusiness.tools](https://bethebusiness.tools)